KANTAR IMRB

Understanding Mobile Gaming in India 2018

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MOBILE MARKETING ASSOCIATION

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TOPICS

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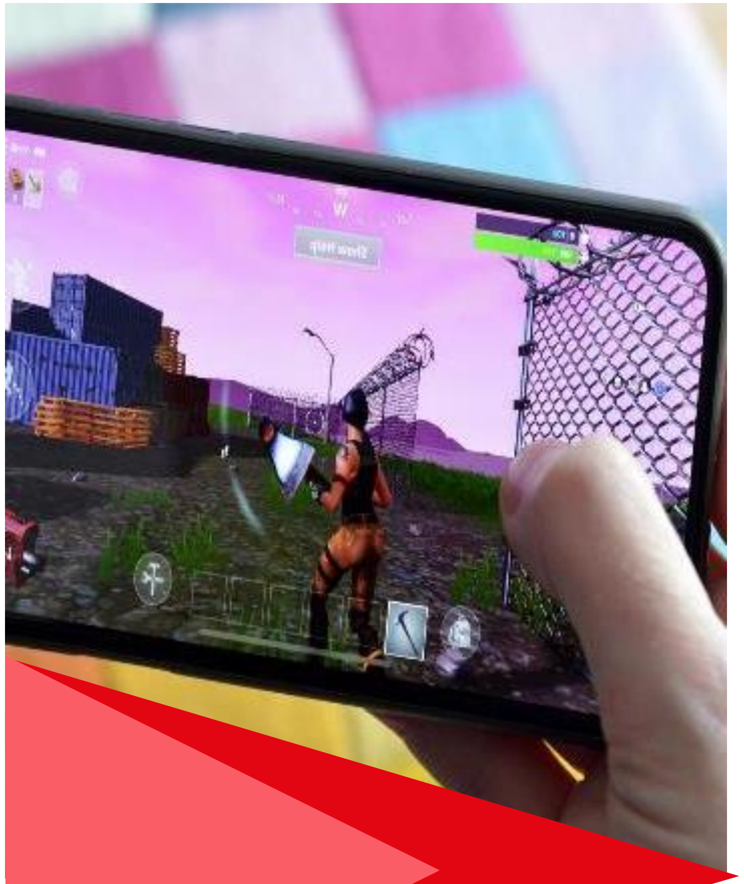

Indian mobile gaming : An overview

Indian online gaming market: an overview

The online gaming market in India is expected to reach new heights with a jump of nearly 28% CAGR by 2021[1]. The growth is being fuelled by many enablers in the ecosystem viz., affordable smartphones and cheaper data plans to name a few. Additionally, factors like higher disposable income and propensity to spend on new mobile devices in the country would play a pivotal role in pushing this growth.

Did you know ?

- ✓ **Around <u>50%</u> of smartphone users play mobile games [2]**
- ✓ **Average time spent on mobile games daily is <u>more than one hour</u> [2]**

[1] KPMG Report on Indian Online Gaming – 2017,

[2] Kantar IMRB WAM data

The power of mobile gaming in India

250 Mn+

Mobile Gamers in India[a]

3 out of 4

Indian gamers play mobile games more than twice a day[b]

Amongst

Top 5

gaming countries globally[c]

60 mins+

Daily avg. time spent playing mobile games[d]

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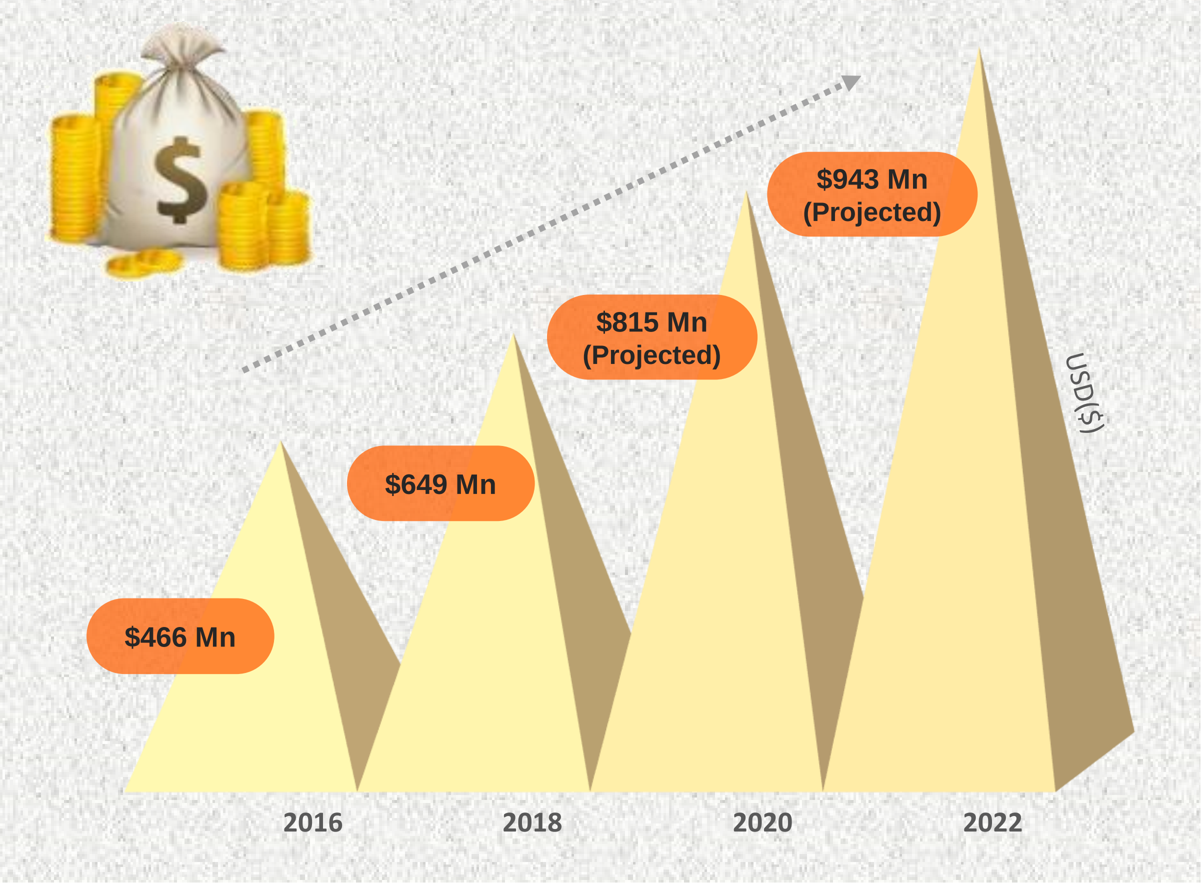
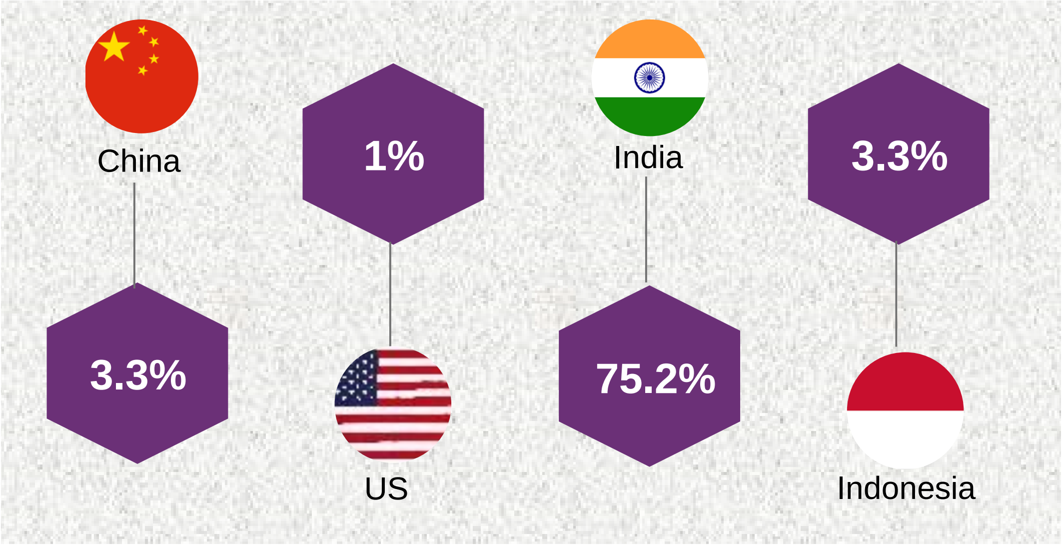
a. Secondary Research
b. Kantar IMRB and Pokkt Survey 2018
c. Newzoo 2018
d. Kantar IMRB WAM Panel

Mobile gaming revenue accelerates



Mobile gaming revenue in India (in USD millions) from 2016 to 2022

Annual mobile gaming revenue in India is projected to grow to USD 943 million in 2022 [3] , making India the fastest-growing mobile markets in the world by overall revenue. Growth in average annual spend per paying mobile gamer is also set to witness a double-digit growth[4] when compared to other markets.



Growth in average annual spend per paying mobile gamer (between 2018 and 2020)

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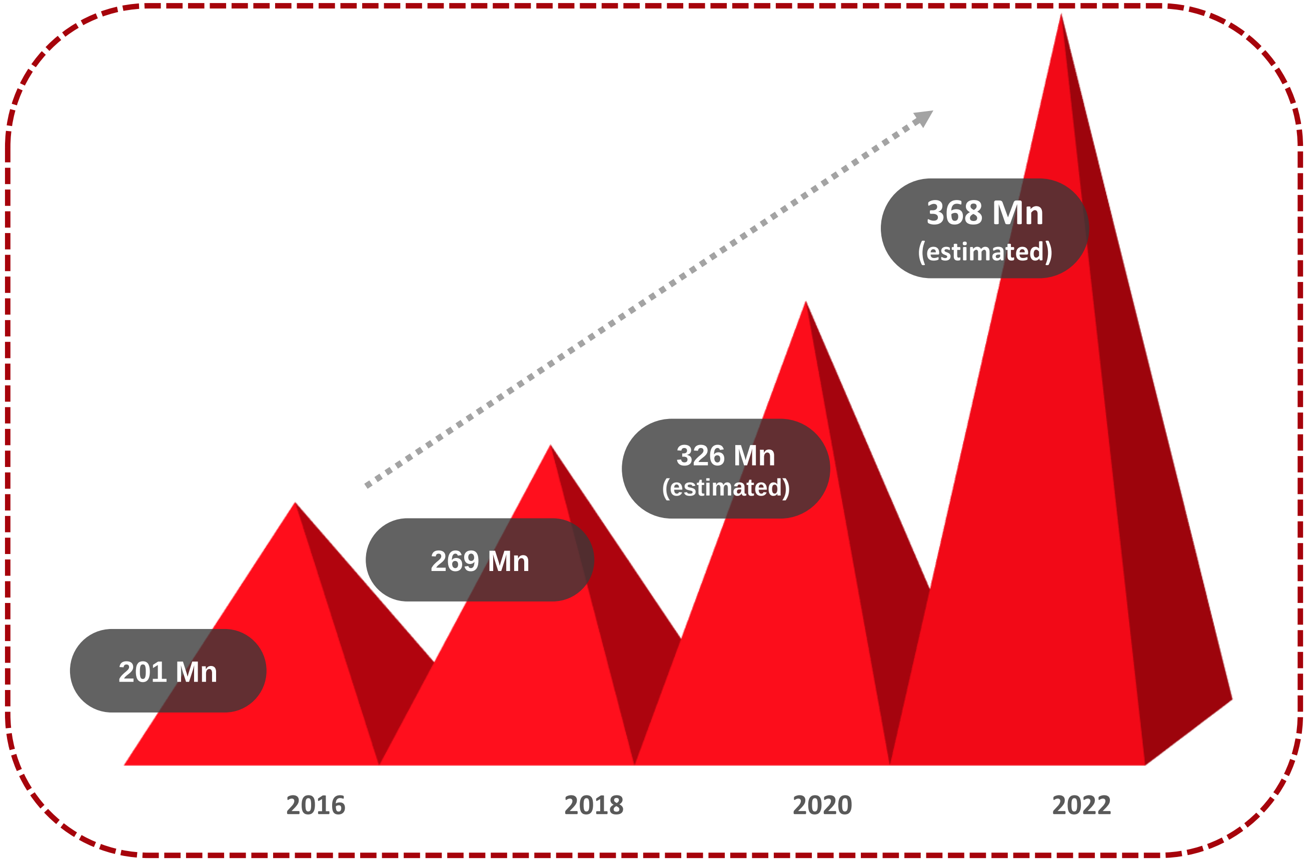
[3]Statista and Pokkt insights,

[4] Global games Market report, Newzoo, 2018

Surge in mobile gamers in the country



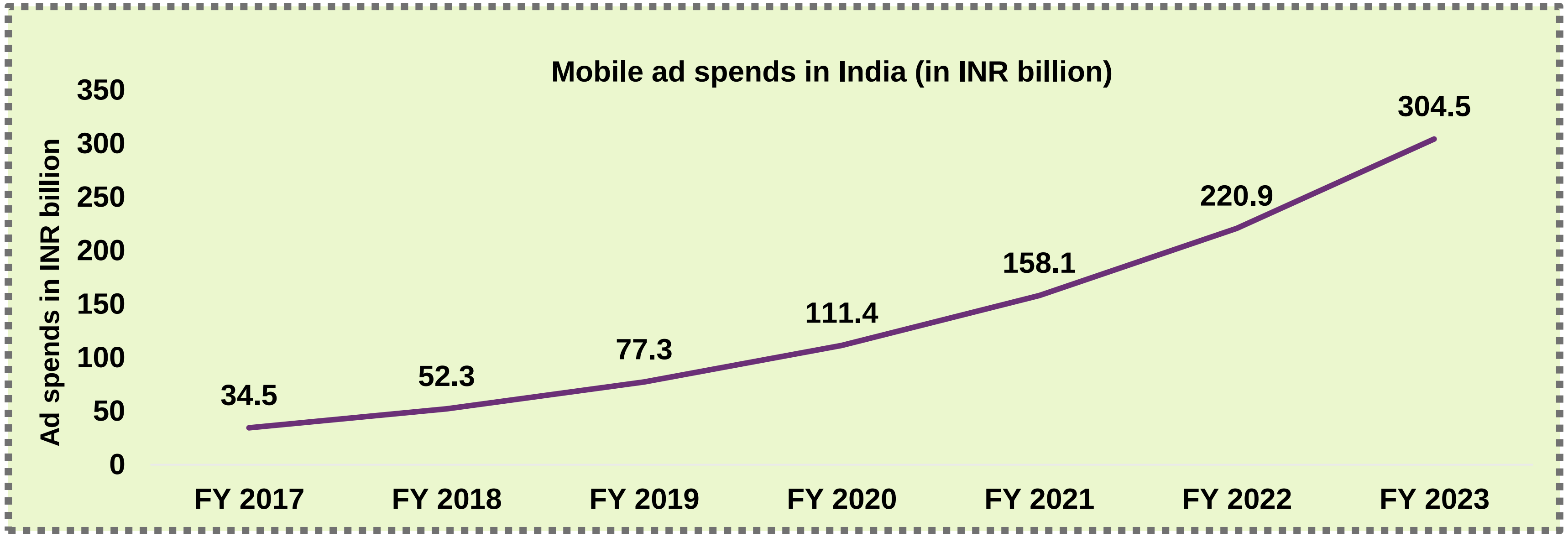
"Phenomenal growth in mobile gamers in India"

Expected to further increase to 368 Mn in 2022

Mobile advertisements – supercharged growth

With digital ad spends becoming mainstream in India, it is expected to cross INR 400 billion in 2023. In line with this, brands today are devoting a larger share of their marketing budgets towards mobile advertisements in order to leverage this opportunity. Coupled with increased time spent on mobile games and a growing population being glued to smartphones, targeted mobile ads are a compelling medium for marketers to maximize their ROI through higher engagement and reach.

Mobile advertisements are expected to grow from INR 34.5 billion in 2017 to INR 304.5 billion in 2023 at a CAGR of 43.8%.



Source : Media and Entertainment in India, report, KPMG, 2018

Why is Mobile Gaming important to a marketer?

When it comes to Mobile gaming, India has a diverse consumption pattern and gaming behaviour; and thus demystifying the role and impact of mobile is imperative for marketers seeking to leverage mobile ad campaigns effectively.

With the meteoric rise in the mobile gaming industry, mobile advertisements are expected to be the biggest contributor in the growth of digital advertising in the years to come. India's mobile advertising market is set to account for 62%[6] of the total digital ad spends in India.

> ***"Given the dramatic shifts in the way consumers are engaging with mobile media —and gaming in particular—it becomes imperative for marketers to understand the role of mobile gaming in the consumer's daily life."***

[6] eMarketer, report 2017

All you need to know about mobile gamers : a snapshot

Mobile phones are used as a primary device to play games. **Omni-channel** preferred (both online and offline mode)

Prime time is the new time for gaming | Prefer **uninterrupted gaming** experience

Today's gamer is a **multi-genre gamer** | Majority play **more than** twice a day

High degree of experimentation in trying out new games

Free to play games are played by the majority

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

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Understanding India’s mobile gamers

What will we cover in this section ?

<u>**UNDERSTANDING INDIA'S MOBILE GAMER(S)**</u>

- ➢Who are India's mobile gamers
- ➢How is Mobile gaming redefining family time
- ➢Triggers for mobile gaming
- ➢Popular genres of mobile games
- ➢Deep dive into popular genres preferred across gender and age cohorts

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WHO IS THIS GAMER ?

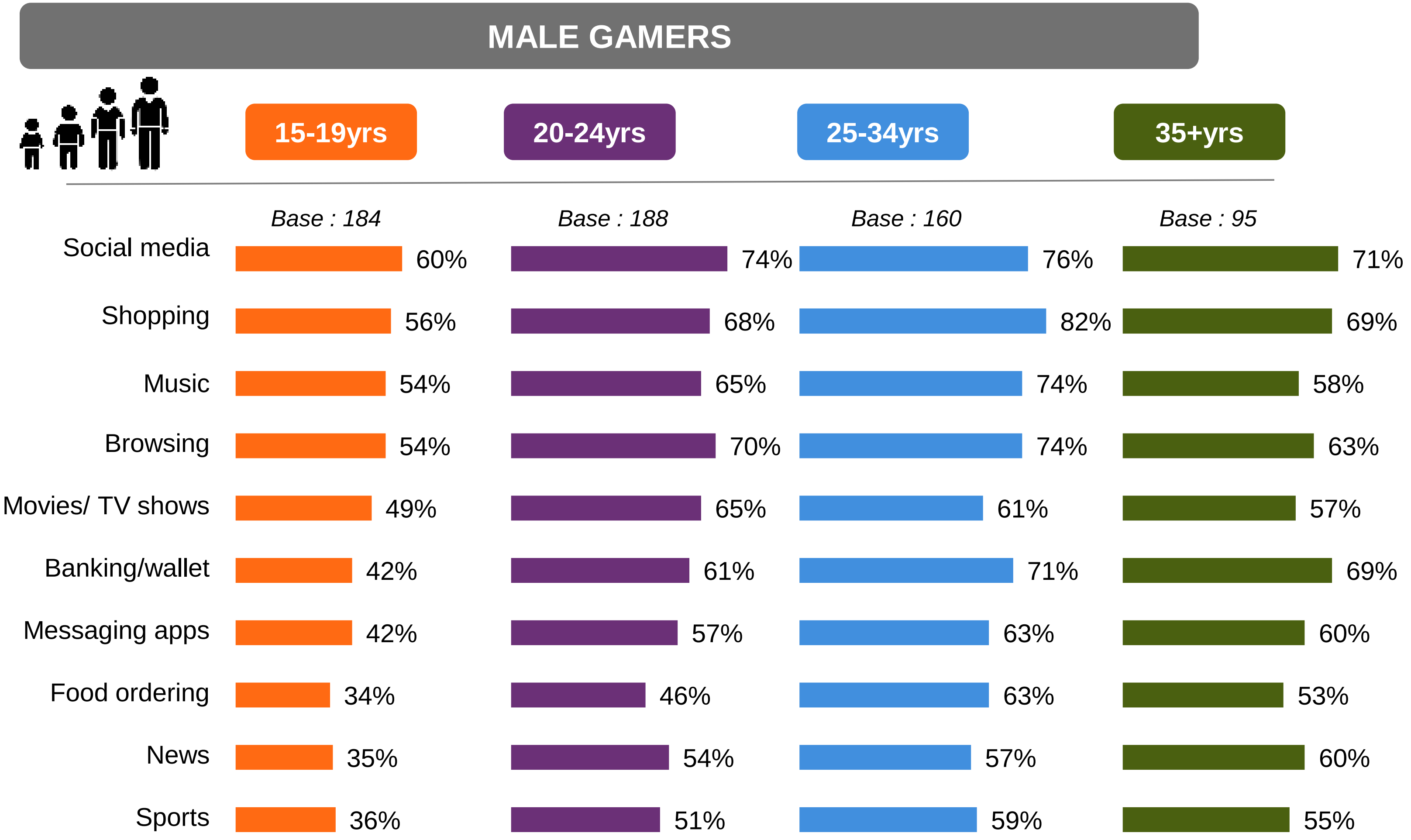
Mobile gaming : not just for Men and the Young

45% of mobile gamers are females and 58% of moms are gamers.

Older audiences regularly engage with mobile games. Nearly 1/3rd of gamers are aged 35+

Source : Kantar IMRB MAM data Jan'18 to Aug'18

What do male gamers do online ?

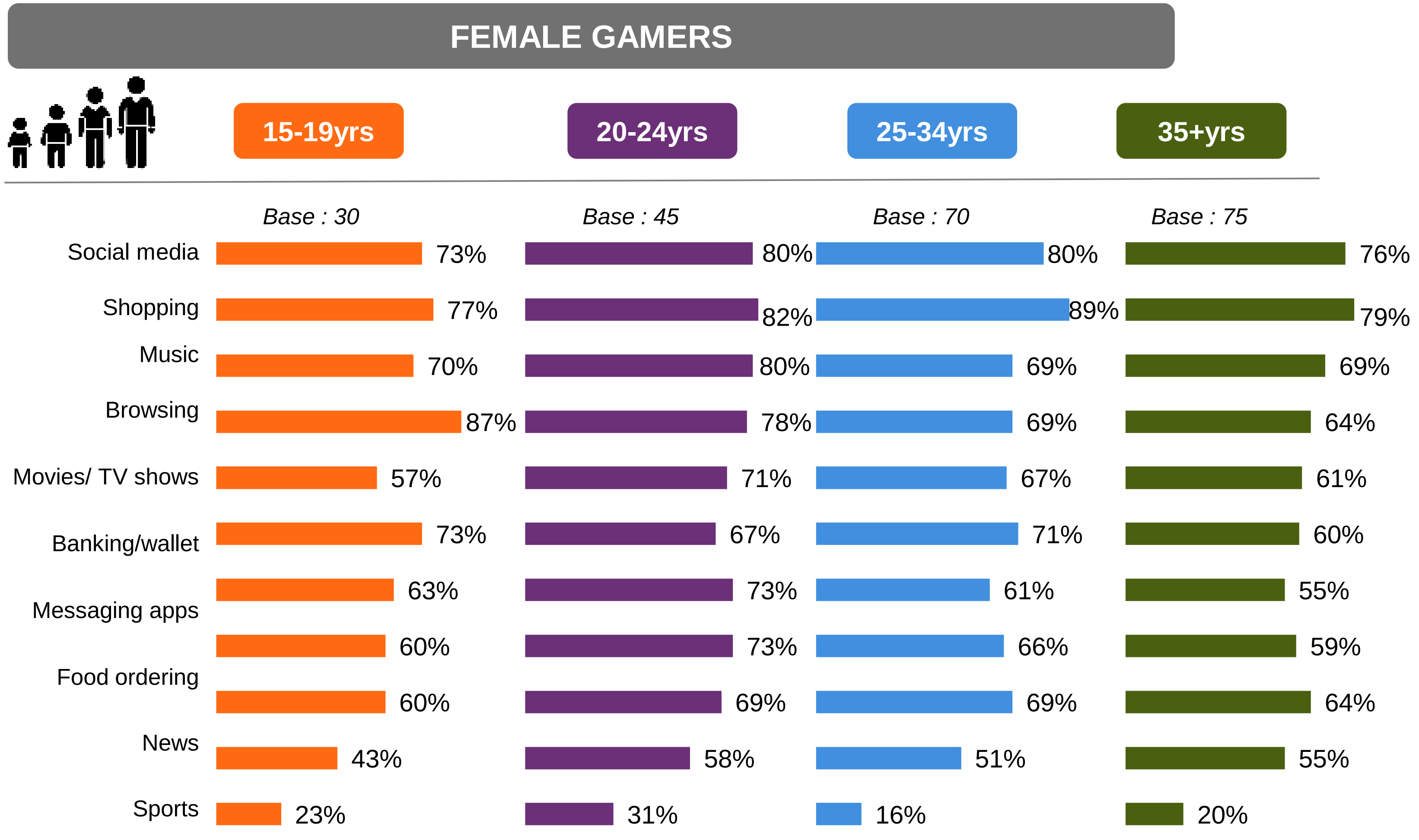


ACTIVITIES DONE ONLINE

Social media, Shopping and Entertainment (Audio / Video streaming) are the most popular activities undertaken by Males. Online banking and payments, News, Sports, and Food ordering are not so popular for teens but this category has much higher relevance for older age groups.

Kantar IMRB and Pokkt survey, 2018

What do female gamers do online ?



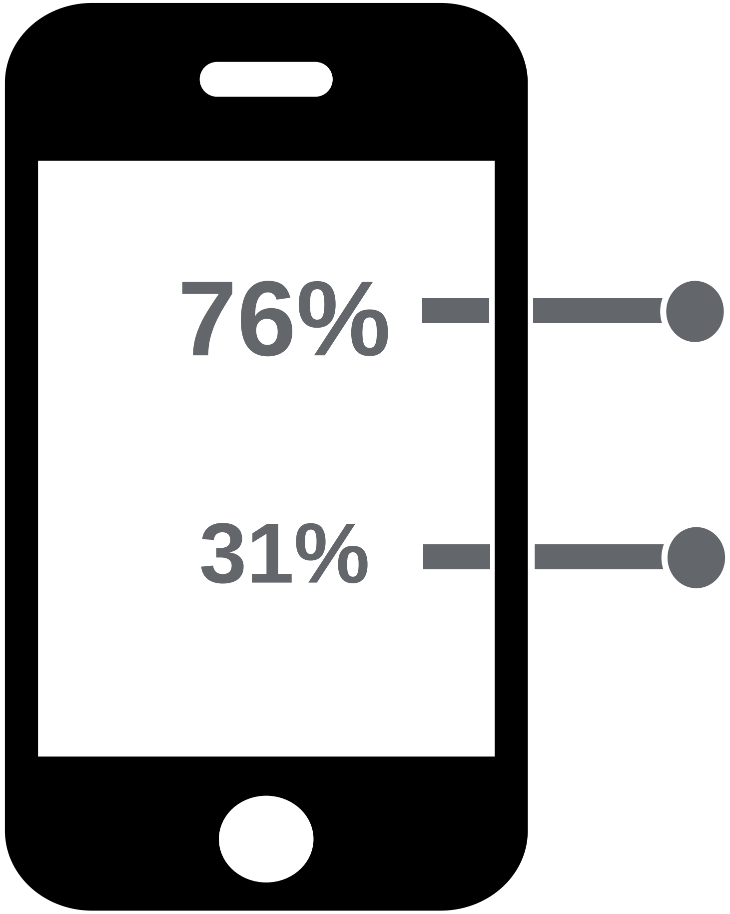
ACTIVITIES DONE ONLINE

Social media, online shopping and listening to music are the popular activities done online by female gamers across age cohorts.

Women in the age group of 20-34yrs access online banking/wallets and watch Movies / TV shows as well on a large scale.

Kantar IMRB and Pokkt survey, 2018

Mobile games are a <u>highly engaging</u> medium



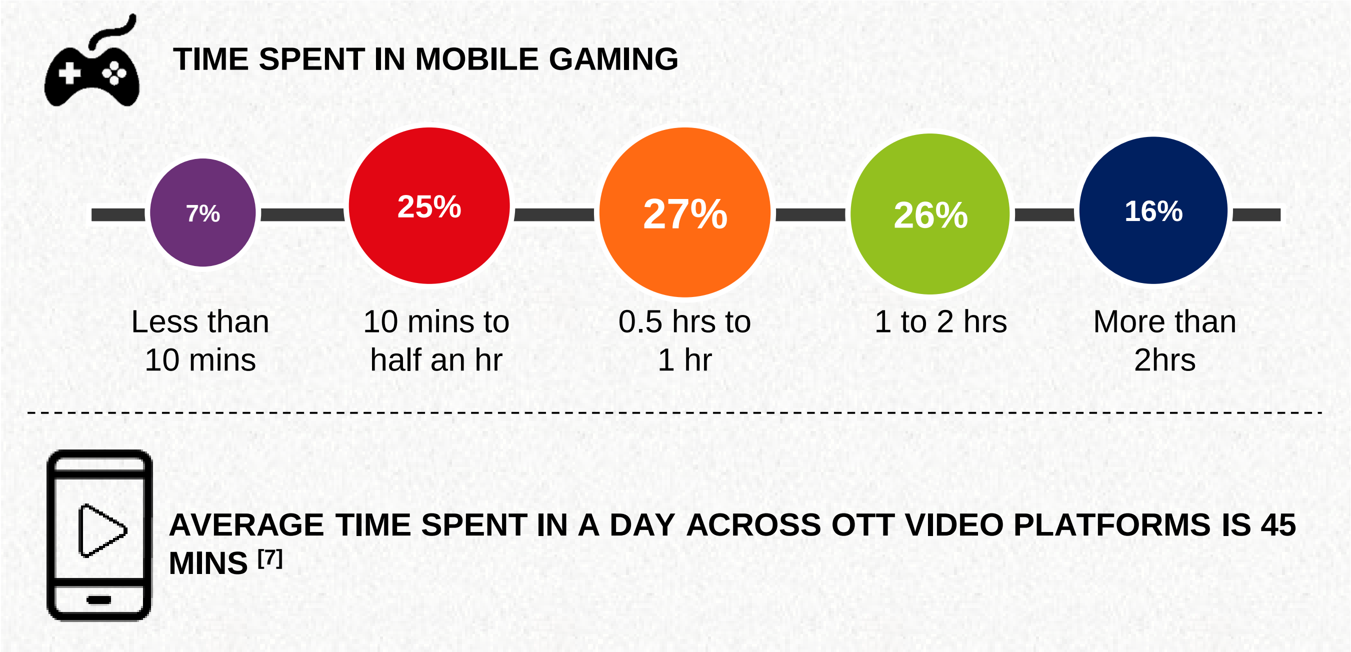
FREQUENCY OF PLAYING GAMES

Three out of four gamers indulge in playing games on their mobile phone **more than twice a day**

31% gamers play games **4-5 times in a day** showing higher levels of engagement in gaming

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Mobile gaming – the new Cinema ?



Around 70% of gamers spend more than half an hour in a day on mobile games while 42% of gamers spend more than an hour playing mobile games

Over 40% of the gamers spend **more than an hour per day** playing mobile games. While the average time spent in a day across 'Over-the-top' video platforms (like HotStar, Voot, Prime Video etc.) is around 45 minutes[7]. The time spent and level of engagement has clear implication for marketers looking to influence consumers on the mobile medium.

Marketing professionals often resort to media vehicles like TV, print, OOH and radio, which are expensive mediums to advertise one's brand. Mobile gaming platforms can prove to be an effective medium for advertising which is also cost effective than Television or other traditional mediums.

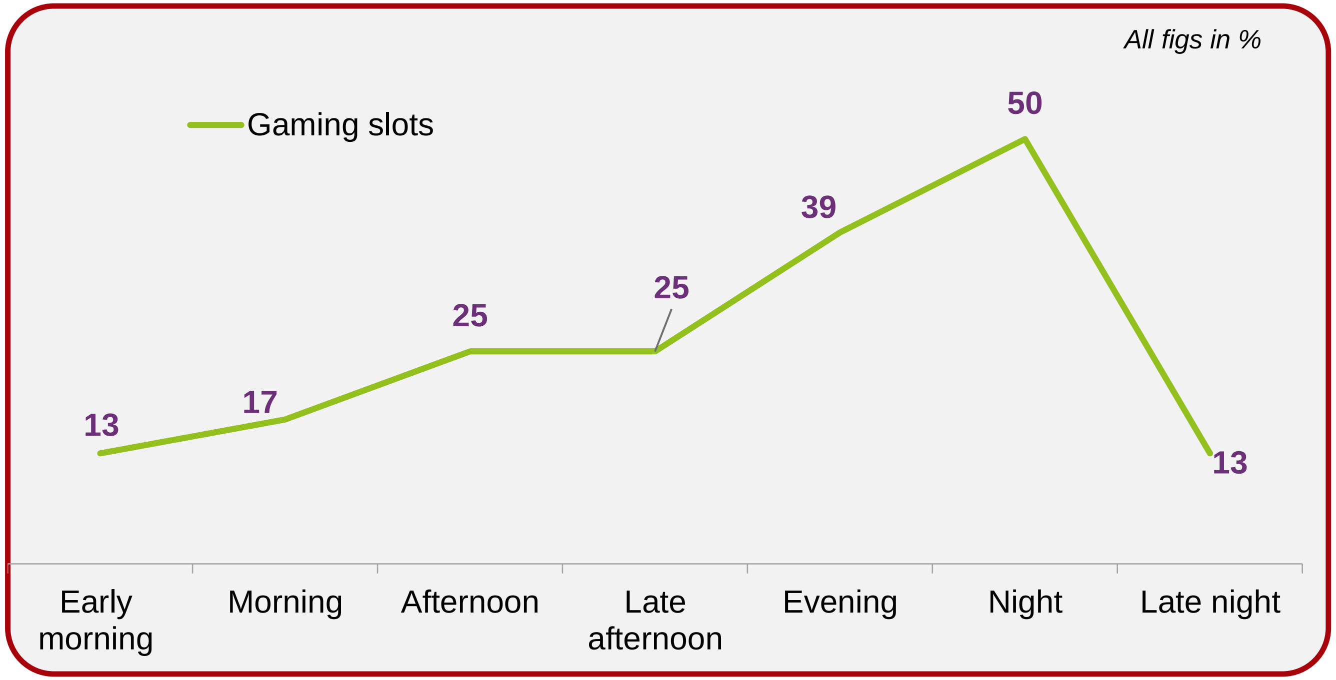
Base (All): 847
[7]Kantar IMRB MAM data Jan'18 to Aug'18
Kantar IMRB and Pokkt survey, 2018

Mobile gaming is redefining family time

PRIME TIME DOES NOT BELONG TO ONLY TV ANYMORE

With the media landscape constantly evolving and with the consumer being exposed to a large variety of touch points, 'Prime Time' is no longer the domain of TV alone.

This definition of 'Prime Time' seems to be changing. The time-slot between 6pm to 12pm which attracts highest TV viewership[8] also has the highest engagement among mobile gamers. Given that mobile games are by and large a solo activity, this also impacts that traditional 'family time' that was being spent in front of the television. A multitude of screens in the household means that even if the television is switched on, it is one of many screens vying for the consumers attention. About 60% of females prefer to play mobile games during the prime time slot and this is also high during the afternoon slot where home-makers play mobile games rather than watching TV shows and serials.



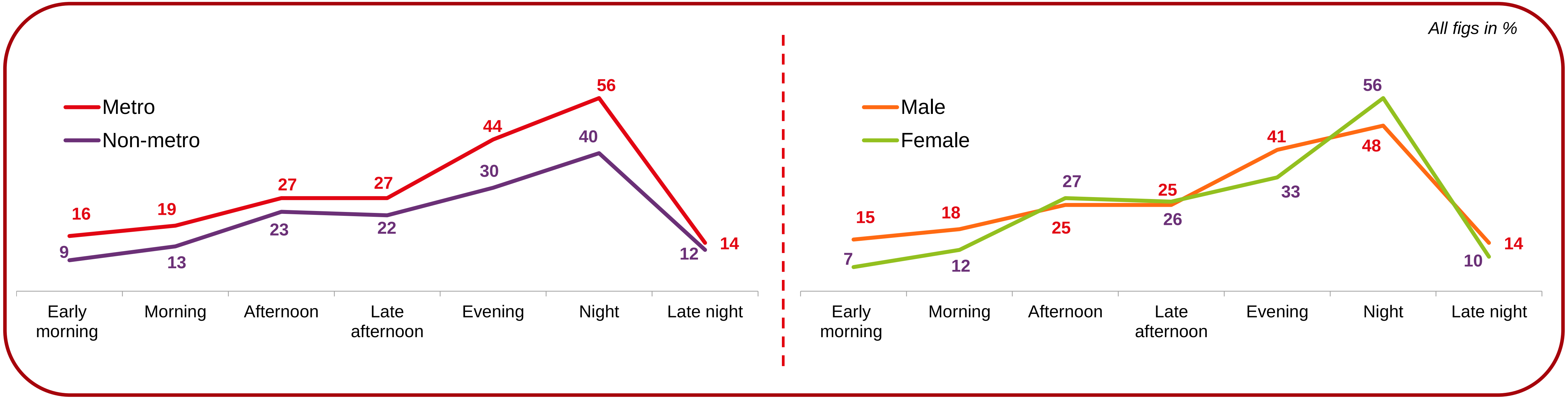
Preferred time slots

Base (All): 847
[8]TV viewership from TGI 2017

Similar patterns, but clear differences

While men largely prefer anytime between 6pm to 12am for playing games, women play more during the night slot of 9pm to 12am.

Metro cities and non-metro cities show similar behaviour with prime time being the most preferred slot for playing games.



Base : Male – 627 ; Female : 220 ; Metro: 518 , Non-metro: 329
Kantar IMRB and Pokkt survey, 2018

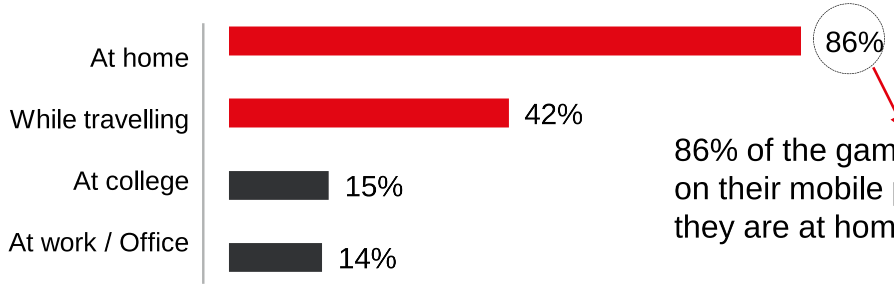
Gaming is the new "Me-time"

Mobile games require focus and attention, so it's no surprise that gamers look for uninterrupted time and gaming experience which would allow them to focus entirely on playing. Playing at home is the preferred gaming destination for mobile gamers, where the disturbance is minimal. The next most preferred venue is during their daily commute when they have dedicated window of uninterrupted time.

> ***Gamers are highly committed during playing and thus prefer to play at home where the disturbance is minimal.***

The benefits of these dedicated time slots is that it puts gamers in a receptive mode to receive, interpret and evaluate information. With this environment, where the gamer is highly engaged, advertising exposures are more likely to leave a stronger imprint in the consumers' mind and positively influencing brand scores.

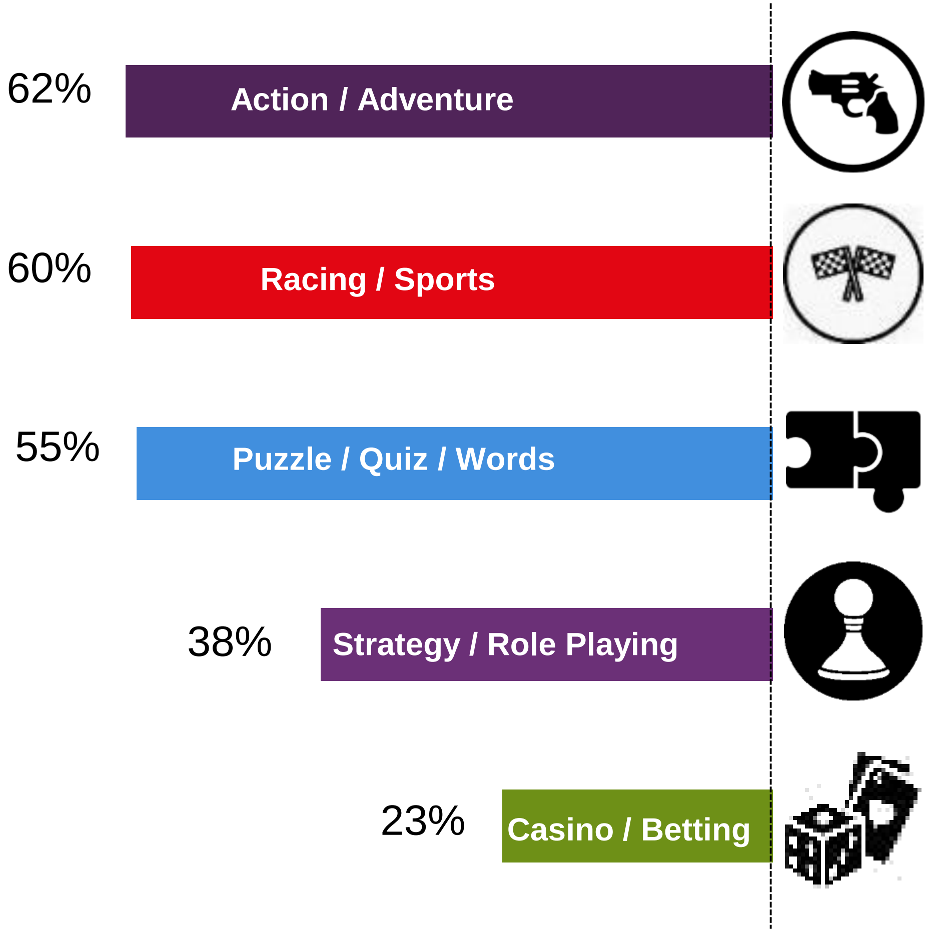
44% of mobile gamers like to play during leisure time



86% of the gamers play games on their mobile phones when they are at home

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Popular genres

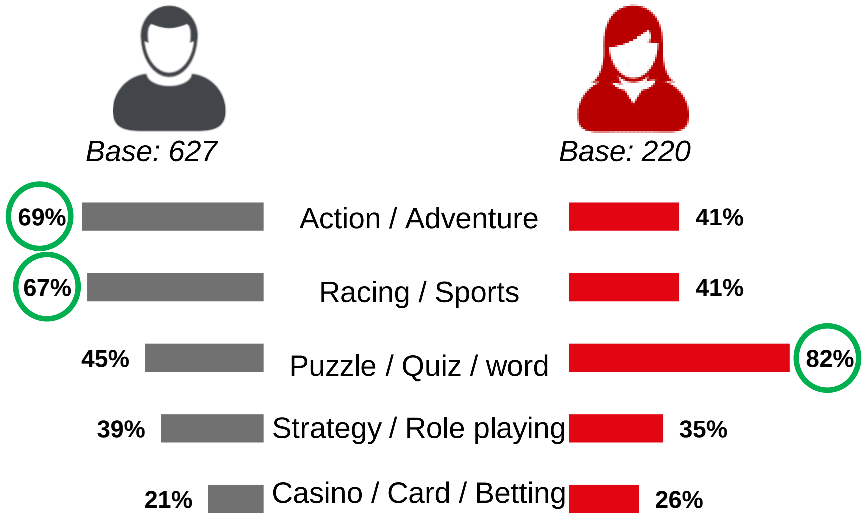


- Today's gamer is a **multi-genre gamer**
- **Action / Adventure, Racing / Sports and Puzzle / Quiz / Words** are the top 3 gaming genres
- Strategy / Role playing games and Casino / betting games are amongst the **least preferred gaming genres**

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Games with an ‘adrenaline rush’ is popular among men while ‘mental simulation’ games is a favourite among women gamers.

Even though gamers prefer to play games from multiple genres, male gamers are more skewed towards Action / Adventure and Racing / Sports games along with other genres. Female gamers on the other hand are more inclined towards Puzzle / Quiz / Word games

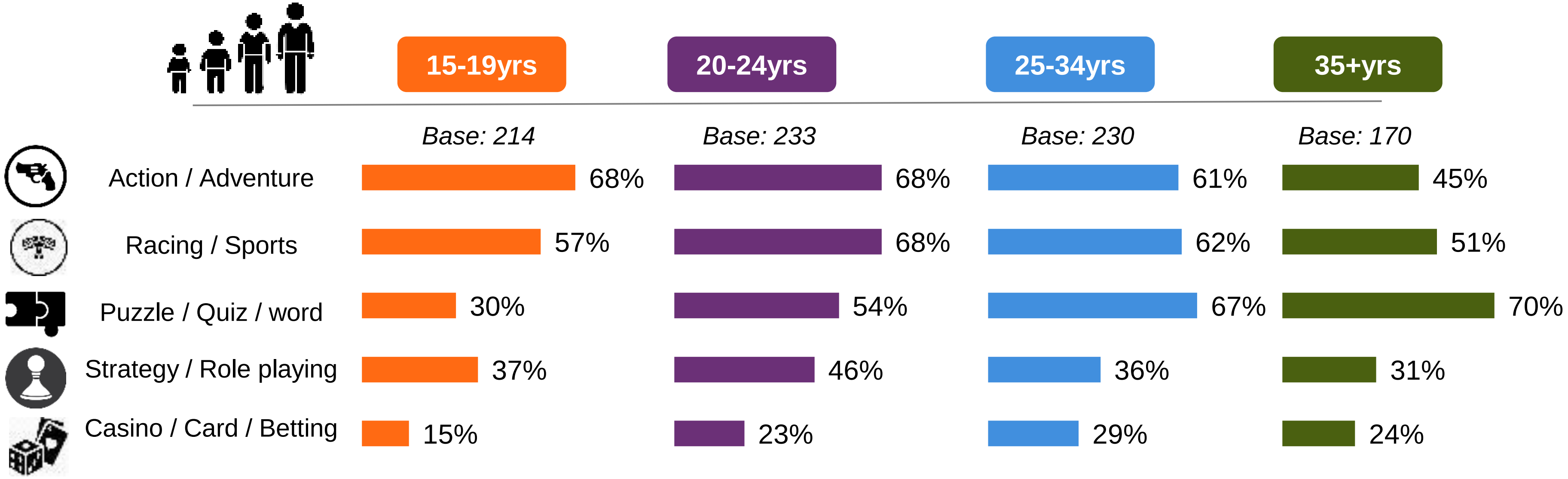


MARKETING IMPLICATIONS:

While gamers like to experiment with different genres, there are clear preferences between the sexes. Furthermore, game preferences change as audiences mature, so marketers seeking to influence consumers should pay heed to these trends when targeting mobile gamers.

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Mental simulation games is a hit among older gamers

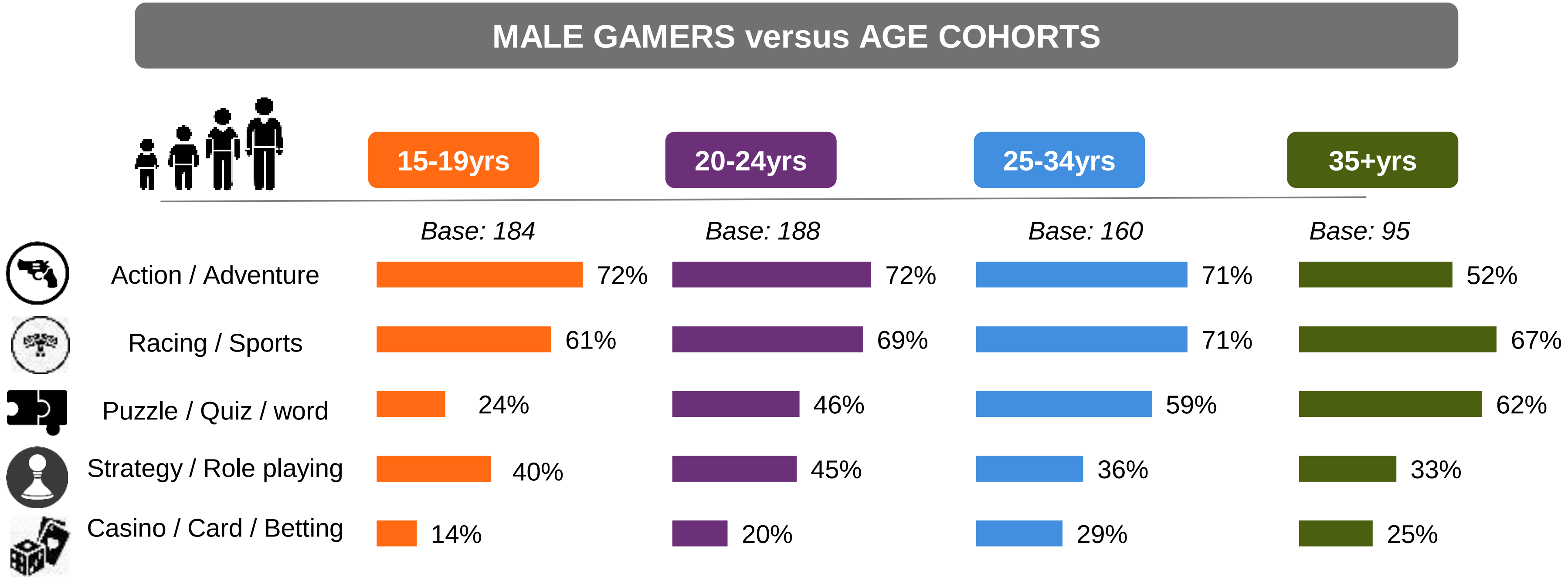


- Among GenZ gamers (15-19yrs), Action / Adventure games and Racing / Sports are the most popular mobile games.
- Strategy / Role playing gamers in the age group of 20-24yrs is significantly higher than the upper age group of 25+yrs.
- Racing / Sports gamers between 20-34yrs is remarkably higher the upper age cohort of 35+yrs.
- Top three genres in the age group of 25-34yrs are Puzzle / Quiz / word games, Racing / Sports and Action / Adventures.
- In the upper age group of 35+ yrs, Puzzle / Quiz / Word games is the most preferred genre.

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Male Gamers - shift in genre preferred as age increases

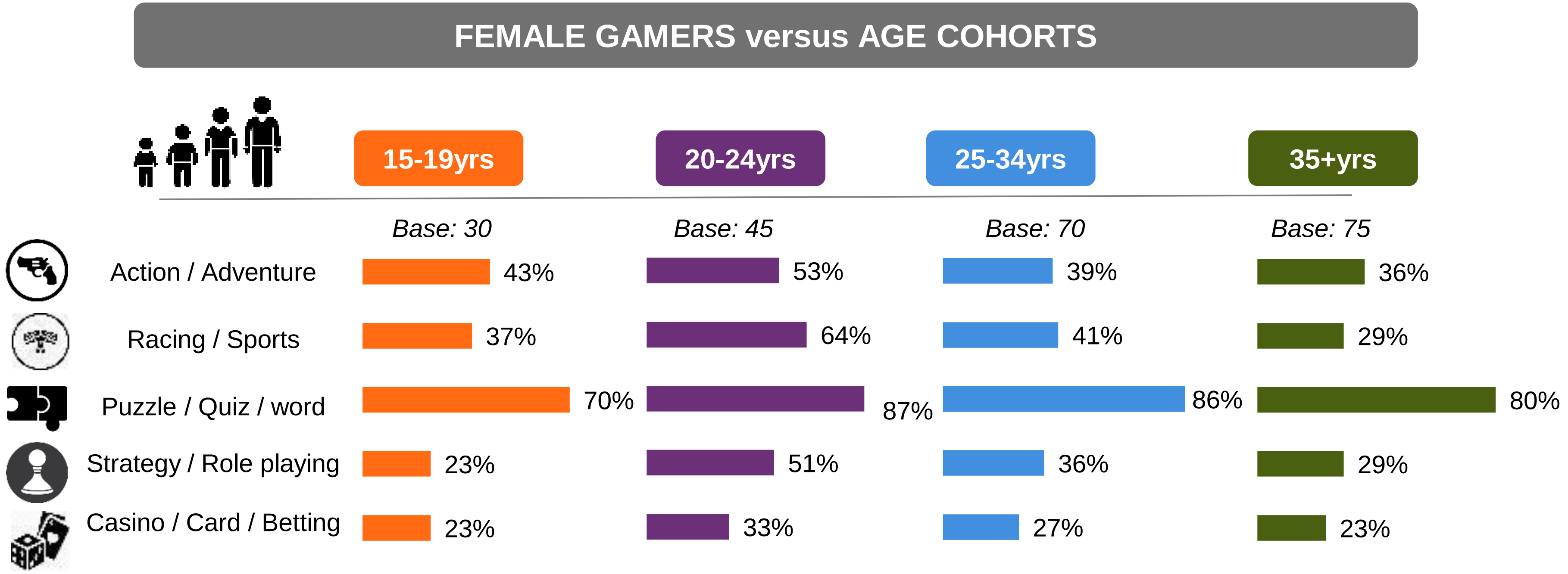
We observe a notable shift in the genre preferred among men as their age increases. Major proportion of younger male are inclined towards games which give them an ‘adrenaline rush’. While preferences shift to ‘mental simulation’ games for Men in the upper age group of above 35yrs. About a quarter of gamers, aged above 25yrs enjoy playing casino / betting / card games.



Base (All Males): 627
Kantar IMRB and Pokkt survey, 2018

Female gamers – Mental Simulation games is a winner across age groups

Female gamers across age groups are highly inclined towards playing puzzle / quiz and word games. Given the multi-genre preferences, female in the age group of 20-34yrs are also likely to play action/adventure and racing games.



Base (All Females): 220
Kantar IMRB and Pokkt survey, 2018

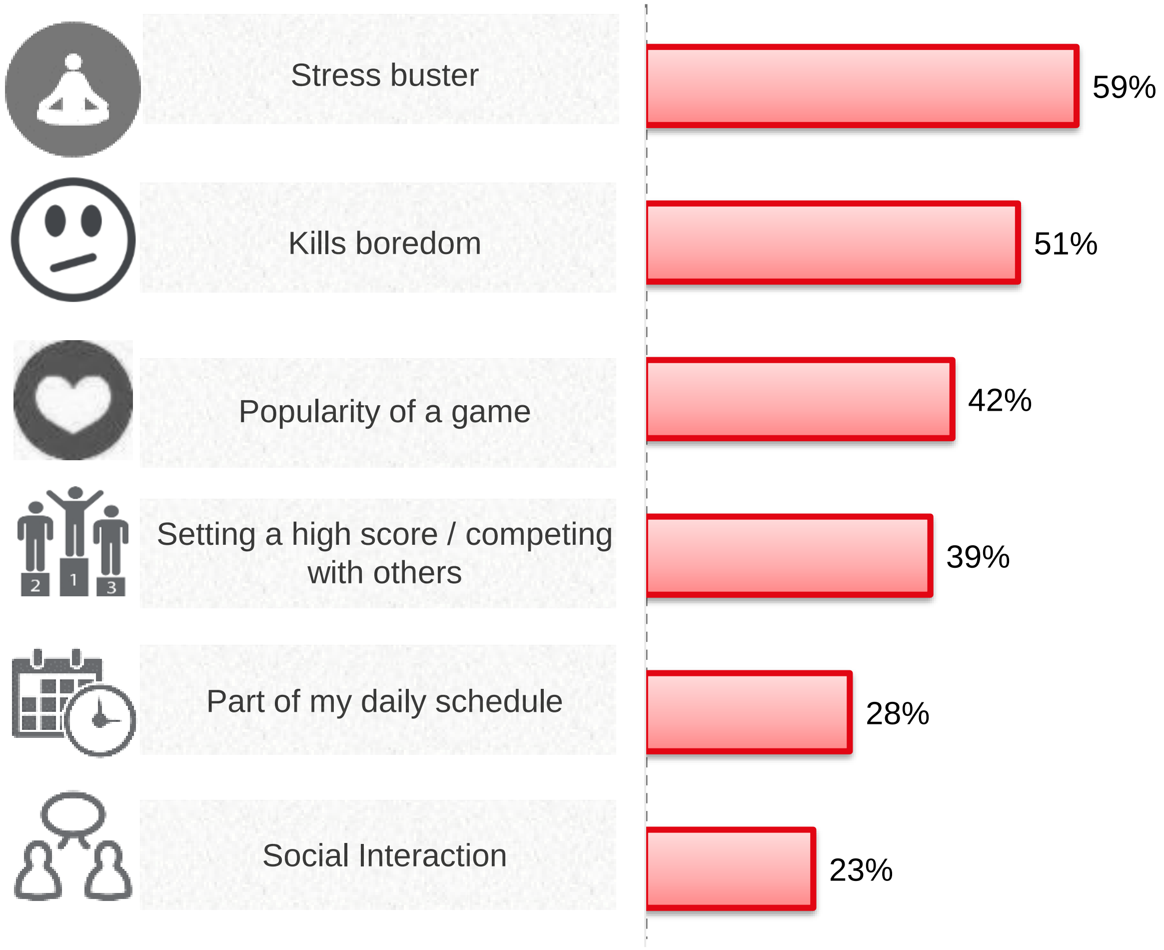
Preferred Genres across NCCS

Action / Adventure games is a preferred across the NCCS households. Mental simulation games like Puzzle / Quiz / Word games is highly preferred by games in NCCS A household.

NCCS

	NCCS A	NCCS B	NCCS C / D /E
	Base: 608	*Base: 144*	*Base: 95*
Action / Adventure	65%	51%	56%
Racing / Sports	65%	53%	42%
Puzzle / Quiz / word	63%	42%	21%
Strategy / Role playing	46%	19%	15%
Casino / Card / Betting	25%	19%	11%

What triggers gaming ?



Base (All): 847
Kantar IMRB and Pokkt survey, 2018

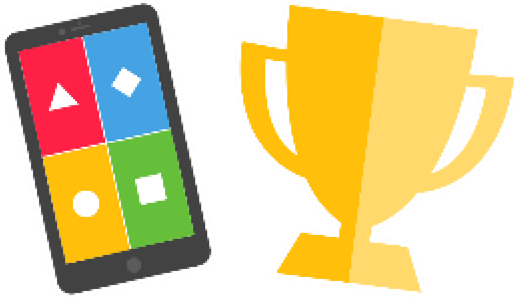
Mobile games : A daily ritual

Around 30% of the gamers play mobile games as a part of their daily regime.

For three in ten mobile gamers, playing mobile games daily is synonymous to a lifestyle. High stickiness to playing games and large amount of time spent in playing games daily leaves a broad opportunity to tap these audiences for a marketer. With higher inclination to play mobile games daily, the engagement rates is likely to be high and the receptivity of the ad campaign can be remarkable.

RUSH TO COMPETE AND WIN MOTIVATES GAMING

Around 40% of gamers have a strong urge to set up high competitive scores which motivates them to play mobile games.



Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Seeking new experiences: Gamers like to experiment and play new games

73%	49%	40%	29%	18%	18%
Google Play Store	Social Media	Recommendations from friends/family	Ads while playing games	Ads on non-gaming apps	Gaming forums

Mobile gamers like to discover and experiment new games via Google Play Store; which indicates that gamers do not prefer waiting for reviews and feedback from friends / family to try out new games. Social media is the next medium through which gamers learn about new games. Advertisements, recommendations are of secondary importance to gamers when it comes to learning about new games.

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

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Monetization of mobile games

What will we cover in this section ?

MONETIZATION OF MOBILE GAMES

This section entails how can a marketer leverage and benefit by understanding the spends made on mobile games and the type of games downloaded by a mobile gamer.

- What type of games do gamers play ?
- How much do gamers spend on buying games?
- Does the spending pattern differ across age groups ?

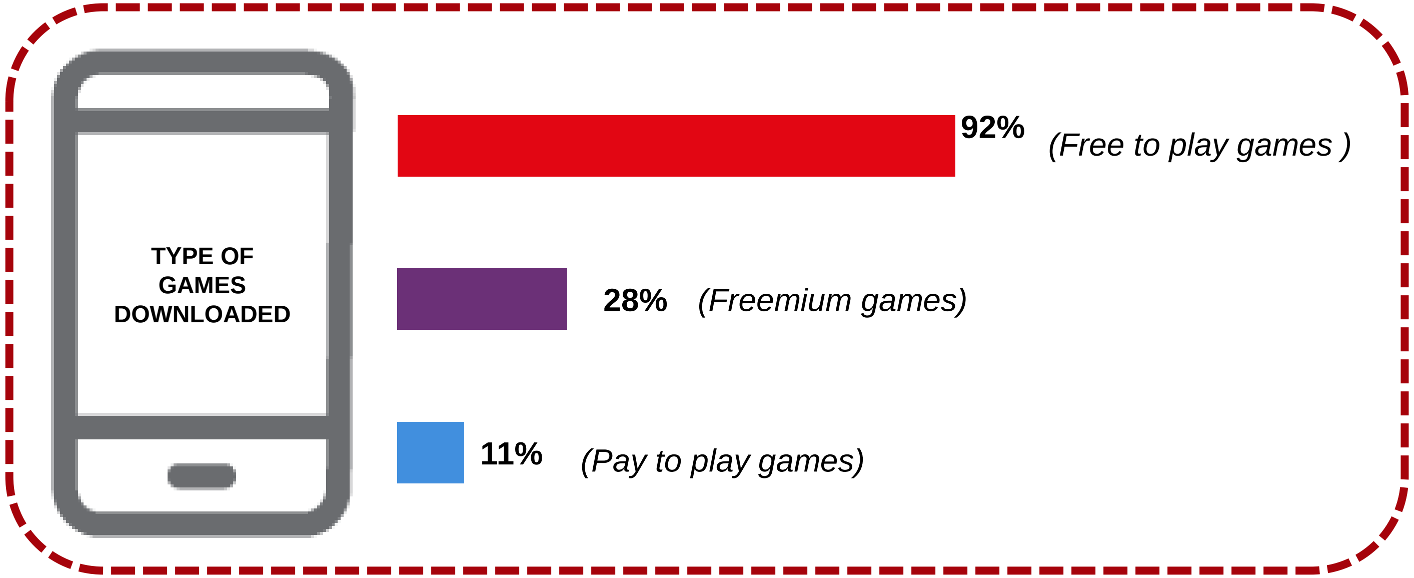
Type of games downloaded

HOW MOBILE GAMES ARE CLASSIFIED

Free to play games	Free-to-play games are available for downloading free of cost. Advertisements are the main source of revenue for such free to play gaming models
Freemium games	The freemium model of games is structured such that the developers release the core functionality of the games for free (i.e. the gamer would be allowed to download the games for free), while upgrades and additional content is made available for a price through in-app purchases
Pay to play games	In this gaming model, gamers pay upfront in order to download the games.

‘Free’ lures gamers

Even though majority of gamers prefer to download ‘free to play’ games, **about two in every five gamers prefer to pay for the games at any stage of mobile gaming**.



Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Propensity to pay – a result of engrossed gaming

Spends made for buying games

Though free to play games are likely to be downloaded by most of the mobile gamers; a sizeable chunk (more than 50%) of **gamers are willing to spend more than INR 50/-** for buying games. About one in five are also open to paying more than INR 150/- for downloading a game.

Inclination to spend more than INR 50/- can be attributed to the gamer's daily routine of gaming.

Base: those who pay for games (272)

44%	36%	20%
Less than INR 50/-	Between INR 50/- to 150/-	Above INR 150/-

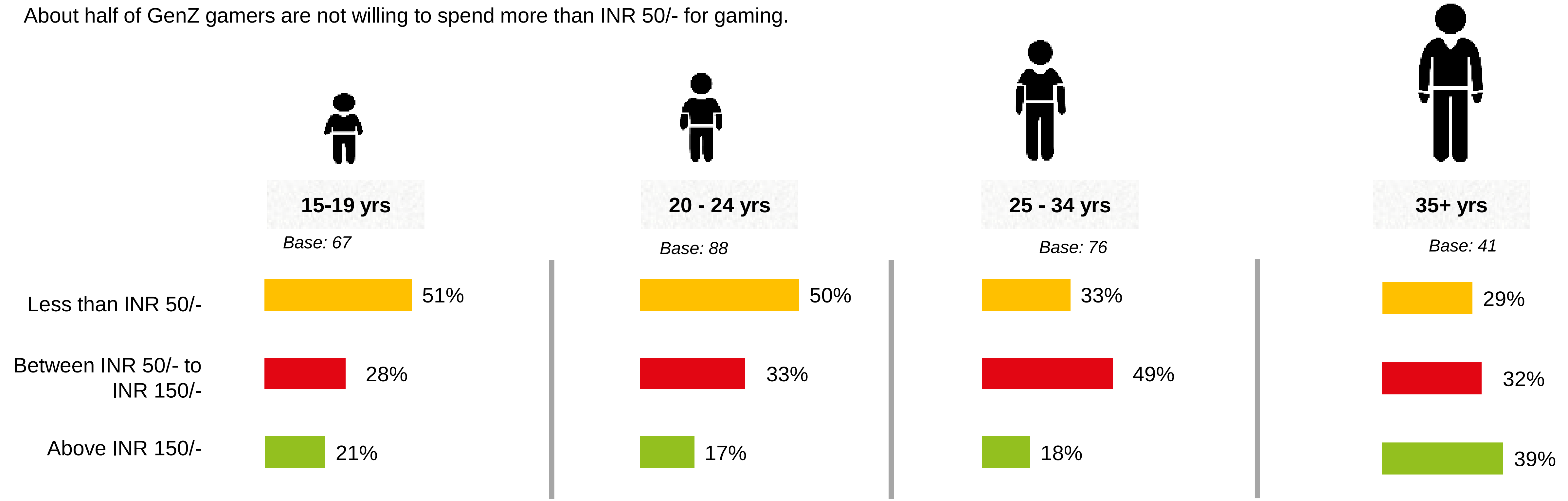
Base (All those who pay for games): 272
Kantar IMRB and Pokkt survey, 2018

Higher the age, higher is the propensity to spend on games

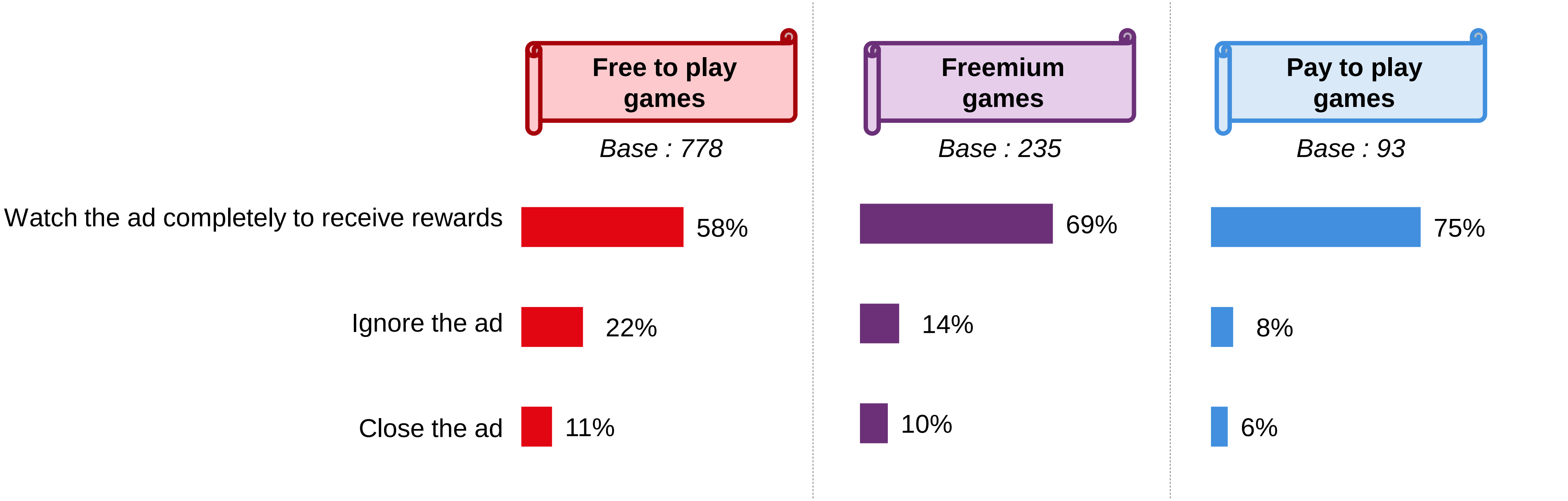
As the age grows, the propensity to spend on mobile games increases. The upper age bracket of gamers (above 35+ years) are likely to spend more than INR 150/-.

There is a huge scope to convert free to play gamers in this age cohort to download paid games as they have a higher propensity to spend.

About half of GenZ gamers are not willing to spend more than INR 50/- for gaming.



Reaction to mobile ads



Gamers who play ‘free to play games’ tend to ignore the mobile ads which they see while playing as it could be interruptive while gaming. However, gamers who pay for games at any stage of gaming are more likely to watch the ad completely to enter into the next level while playing.

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

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Mobile Gaming Advertisements

What will we cover in this section ?

<u>MOBILE GAMING ADVERTISING</u>

With varied choices and preferences of gamers in mobile gaming, advertisers can take advantage of this opportunity by understanding the format of ads that would be most engaging, placement of the ad on the screen so as to draw gamer's attention. This section would envisage the following:

- Why is mobile advertising important to a marketer
- Advertisement recall
- Categories perceived as relevant in the ads
- Ad format preferred
- When to show an ad to the gamer and where should the ad be placed for higher engagement?
- Understanding gamer's perception towards ads

What did we learn?

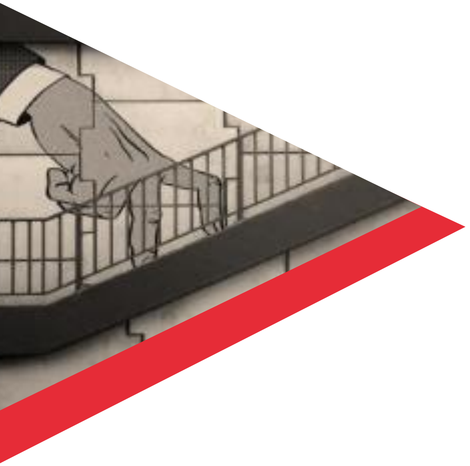
Higher acceptance to advertisements on gaming platforms

58%	Watch the ad to receive points/rewards
22%	Ignore the ad
11%	Close the ad

About 60% of the gamers watch rewarded video ads while playing games. As rewarded games unlock entry to the next stage and shares points and rewards, mobile gamers tend to watch such ads to receive in-game rewards. Only 1 in 10 gamers tend to close the ad, thus presenting a lucrative opportunity to a marketer to place advertisements on mobile games.

Gaming ads are more personalised than TV or Radio ads

Perception of gaming ads being more personalized than TV/print or radio



Top 2 box score
(Completely agree / Somewhat agree)

~50%

At an overall level, almost half of the gamers consider gaming ads to be personalized. Metro gamers consider mobile gaming ads to be more personalized when compared to a non-metro gamer.

	Metro	Non-metro	Male	Female	15-19 yrs.	20-24 y.rs	25- 34 yrs.	35+ yrs.
Base:	***518***	***329***	***627***	***220***	***214***	***233***	***230***	***170***
Top 2 Box Score (Completely agree / Somewhat agree)	51%	42%	48%	49%	49%	49%	51%	42%
Bottom 2 box score (Completely disagree / Somewhat disagree)	26%	41%	33%	25%	33%	33%	30%	28%

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Highlighted in green: Significantly higher at 95% CI

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Leveraging mobile gaming ads –

How have brands effectively used mobile gaming as a platform for advertising?

Engagement is the key – Promotion opportunities in gaming

Case Study: How Horlicks targeted Moms during exam time ?

The idea of the campaign was to highlight the importance of essential nutrients specially required during exam time and highlight the science of Horlicks.

- The creative had a dynamic clock which presented the daily time to give a realistic approach
- The rich media prompted the user to explore healthy tips from Horlicks
- User engagement will educate them how Horlicks fulfills the required nutrition and drive the user to the desired landing page

Leveraging in-gaming ads – Other markets

Case Study: Nissan's static banner campaign in Thailand

Static banner ad campaign run by Nissan for its different models like Nissan Almera and Nissan Note in Aug'2018.

Banner ads delivered high impressions and clicks for the brand using static banner ads.

Source : Study conducted by Pokkt Video ads, 2018

Leveraging in-gaming ads – Other markets

Case Study: Rewarded video ad for Pantene

Rewarded video ad campaign for P&G's Pantene Shampoo and conditioner was able to engage the gamer into the ad and the click through rate was around 6%. Given the nature of rewarded ads, it is highly likely that a gamer would click on it to reach the next level of the game.

Source : *Study conducted by Pokkt Video ads, 2017*

Leveraging in-gaming ads – Other markets

Case Study: Rewarded video ad yields returns for Gillette (Vietnam Market)

Rewarded video ad campaign for Gillette vector allowed a gamer to respawn in the play once again after watching the ad. CTR for this campaign was at a high of 8.94%.

Source : Study conducted by Pokkt Video ads, 2017

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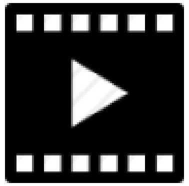
Mobile gaming ad formats

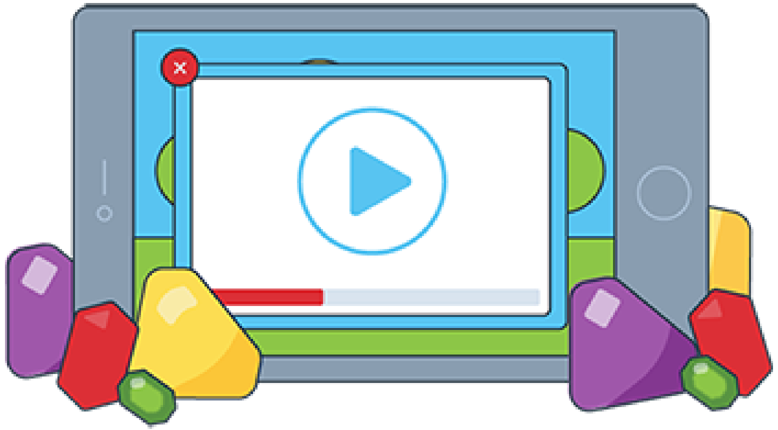
Understanding ad formats

Static banner / image ads



Video ads

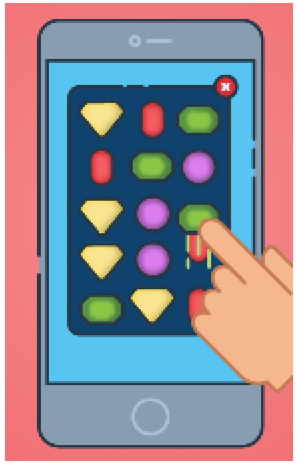
Rich media / interactive ads



Rewarded ads

Users watch a video ad in return for premium in game currencies but choose whether to interact with the content by themselves.

By placing the brand ad during a quiet moment within a game, such as after a player has lost a life, rewarded video advertising encourages users to interact more frequently with adverts.



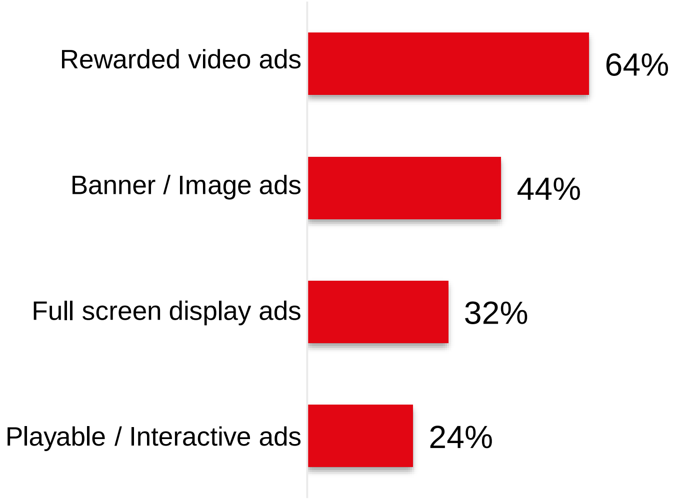
Customized interactive playable ads

Playable ads are interactive ads which are engaging and effective to grab gamer's attention.

With the gamer interacting with the brand ad which is in the form of a game, makes the engagement even more stronger using this medium.

Nearly 2 in every 3 gamers are likely to click ‘rewarded video ads’ – making it a promising ad format for advertisers

Gamers would not mind clicking on the following formats:



Base (All): 847

Rewarded video ads is the most apt ad format, as 64% of gamers do not mind clicking on rewarded video ads while gaming. Given the quid pro quo model of this ad format, it draws gamer’s attention as watching the ad takes them to the next level of the game.

Banner / Image ads – the second best ad format ,can be one of the most effective ones for a marketer as 44% of gamers said that they would not clicking on banner ads / image ads while gaming.

Playable / Interactive ads require higher attention span of the gamer while playing games which can be interruptive while playing games. Thus, playable / interactive might not serve as the best ad format for brand communication.

Rewarded video ads : A quid pro quo approach

With rewarded ads being the most likely format to be clicked while gaming, this format is likely to increase the click through rate for advertisements; thanks to its quid pro quo model. Rewarded ads are non-skippable and triggered by the user where the gamer chooses to watch the ad and in exchange, they are "rewarded".

Reaction to rewarded ads

Base (All): 847

40%	36%	24%
I watch the ad to reach next stage	I watch the ad to avail rewards/points	I close the ad

About three out of four gamers are likely to watch rewarded ads to benefit by reaching to the next stage or to avail points / rewards. The monetization model of this ad format is more likely to benefit the ad platform because of the higher possibility of clicking these ads.

Events that are likely to trigger a mobile gamer to watch a rewarded are as follows:

- A gamer falls short of an important part to play the game
- Entry to the next stage requires the gamer to watch the rewarded ads
- A gamer exhausts free content after a certain level and playing the next level requires viewing rewarded ads

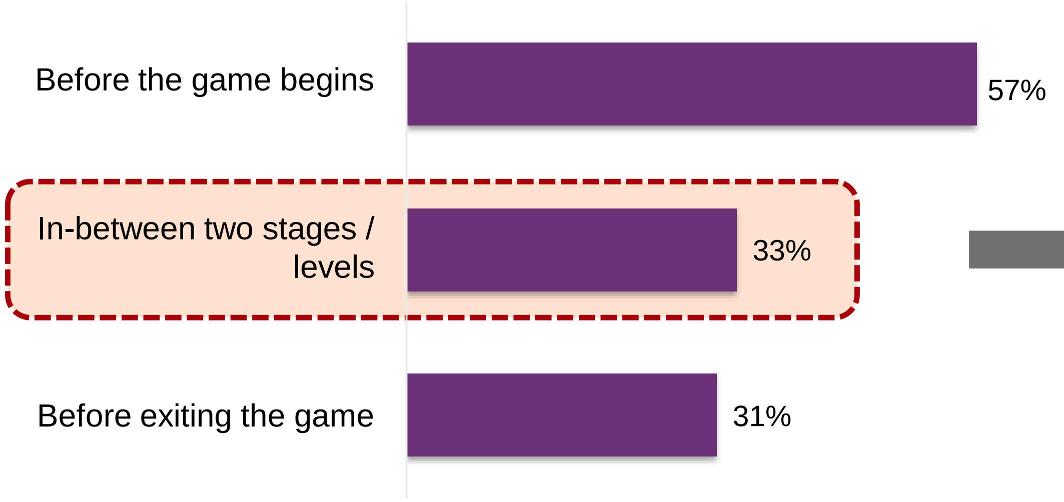
The rewarded ads can prove to be one of the best mediums to engage with the gamers because they are in a spot where app publishers can monetize the opportunity, the marketer at the same time can ensure audience engagement in the process.

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Full screen ads between two stages or levels of games are preferred by nearly 4 in 10 gamers

AD WATCHING PREFERENCE

Base (All): 847



Full screen ads may not work effectively when it is displayed before / after the game begins. However, it is preferred by ~4 in 10 gamers in-between two stages and levels

<u>Among those who prefer in-game advertisements →</u>

- **57%** prefer the ads to be placed at the bottom of the screen (horizontal bottom placed)
- **38%** prefer full screen ads
- **25%** prefer the ads to be placed vertically on the side of the screen
- **25%** prefer the ads to be placed horizontally at the top of the screen

KANTAR IMRB

Are ‘gamer moms’ any different?

Indian Mom – Her digital life

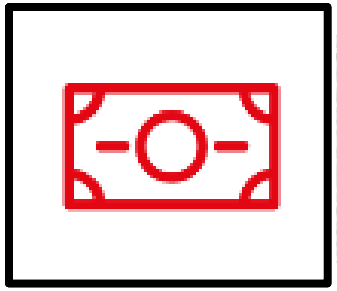
DID YOU KNOW ?

- Globally, mobile moms spend an average of more than 6hrs per day consuming media content
- Multi-tasking for moms is a mastered skill. 3 out of 5 moms engage in dual screen activities (between TV and mobile)
- Listening to music, playing games and consuming videos are the top 3 activities Indian mothers do online

Source : Report on Mobile gaming in India by Madhouse

‘Gamer moms’ prefer to play easy games | Likely to spend less on gaming apps | Would not mind clicking on full screen ads

60% of mothers like to play novice games.



Mothers are likely to spend less on games. 60% spend less than INR 50/- on gaming

AD FORMATS FOR MOTHERS : Although Rewarded Video is the most preferred ad format with moms. Banner / image and full screen display ads are a very close second.

Interestingly, mothers are ~1.2x times more likely to prefer Rewarded Video ads as it rewards the user while playing games and is user initiated. Thus, ensuring higher levels of engagement and better brand recall.

KANTAR IMRB | POKKT MMA MOBILE MARKETING ASSOCIATION

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Summary of the report

G — <u>G</u>aming on mobile is mainstream

A — Attracts wide range of <u>A</u>udiences

M — Highly sticky <u>M</u>edium with increased levels of engagement

E — Prime time <u>E</u>xtends beyond Television

R — Low <u>R</u>esistance to advertising

How can brands play to win? – Leveraging ads on mobile games

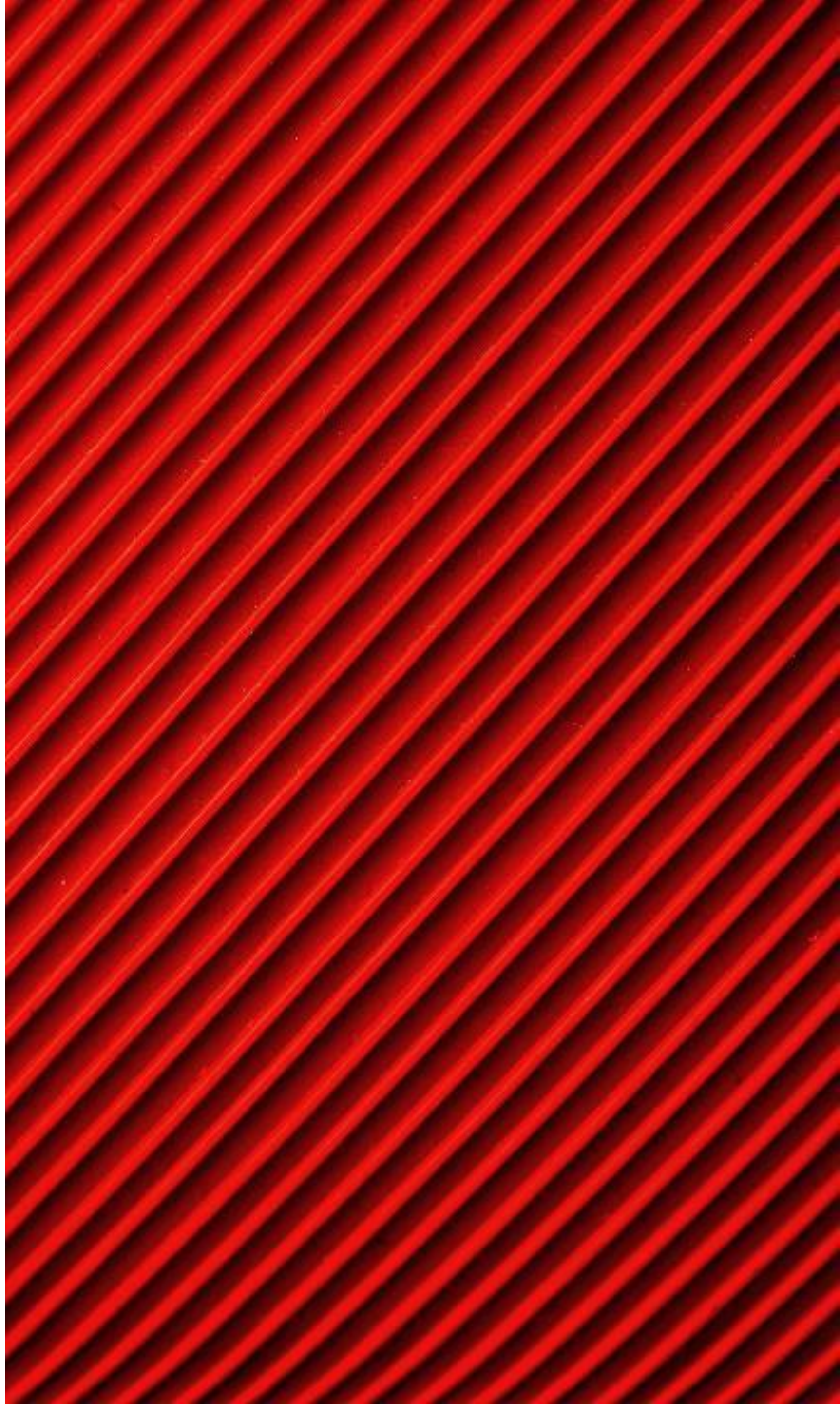
Innovative Environment : Marketers can leverage the opportunity of mobile gaming by publishing their ads in a dynamic gaming environment which keeps the consumer engaged and hooked on to their mobile phones with high attentiveness and thus have an open mind to evaluate the brand communication.

High scoring reach: As mobile games have gamers across all the ages; brands can target audiences across age groups to promote a campaign effectively to drive brand engagement and visibility.

Engagement and creative is the key: Creative ad campaigns to promote a brand on a gaming platform is the key to win on this platform.

Rewarded video ads –a clear winner: Rewarded video ads are the most popular ad format and can prove to be an engaging one to hold a consumer’s attention. Simple ad formats like the banner ads / image ads which are cost effective can also do wonders in uplifting brand communication on a gaming platform as well.

Annexure



Devices preferred and the mode of playing

		Metro	Non-metro	Male	Female	15-19yrs	20-24yrs	25- 34yrs	35+yrs
	Base:	***518***	***329***	***627***	***220***	***214 (A)***	***233 (B)***	***230 (C)***	***170 (D)***
Devices	Mobile	74	84	81	70	81	76	78	78
	Tablet	3	1	2	1	2	1	3	1
	Both Mobile and Tablet	23	15	17	28	17	23	20	21
Mode of playing	Online	20	24	23	17	33 BCD	18	15	21
	Offline	13	18	14	17	16	15	16	14
	Both online and offline	67	57	63	65	50	67 A	69 A	66 A

All figs are in %

Non-metro gamers are highly likely to play games on their mobile phones than a metro gamer. A metro gamer is comfortable playing on both the devices – mobile and tablets interchangeably. Male gamers playing on mobile phones is significantly higher than those of females. Female gamers playing on both the devices – mobiles and tablets outnumber the male counterparts.
No skews seen in the age cohorts

Base (All): 847
Kantar IMRB and Pokkt survey, 2018
Highlighted in green: Significantly higher at 95% CI

Majority of the gamers across the cohorts play mobile games 2-3 times in a day.

Frequency of playing games

	Metro	Non-metro	Male	Female	15-19yrs	20-24yrs	25- 34yrs	35+yrs
Base:	***518***	***329***	***627***	***220***	***214 (A)***	***233 (B)***	***230 (C)***	***170 (D)***
Once in a day	21	28	26	19	31 B	16	24	25 B
2 -3 times in a day	45	46	43	50	45	42	46	48
4-5 times in a day	15	16	15	17	15	21 CD	14	12
More than 5 times in a day	19	10	16	14	9	22 AD	15	14

All figs are in %

Base (All): 847
Kantar IMRB and Pokkt survey, 2018
Highlighted in green: Significantly higher at 95% CI

Gamers spot : where do gamers play?

Preferred place of playing games

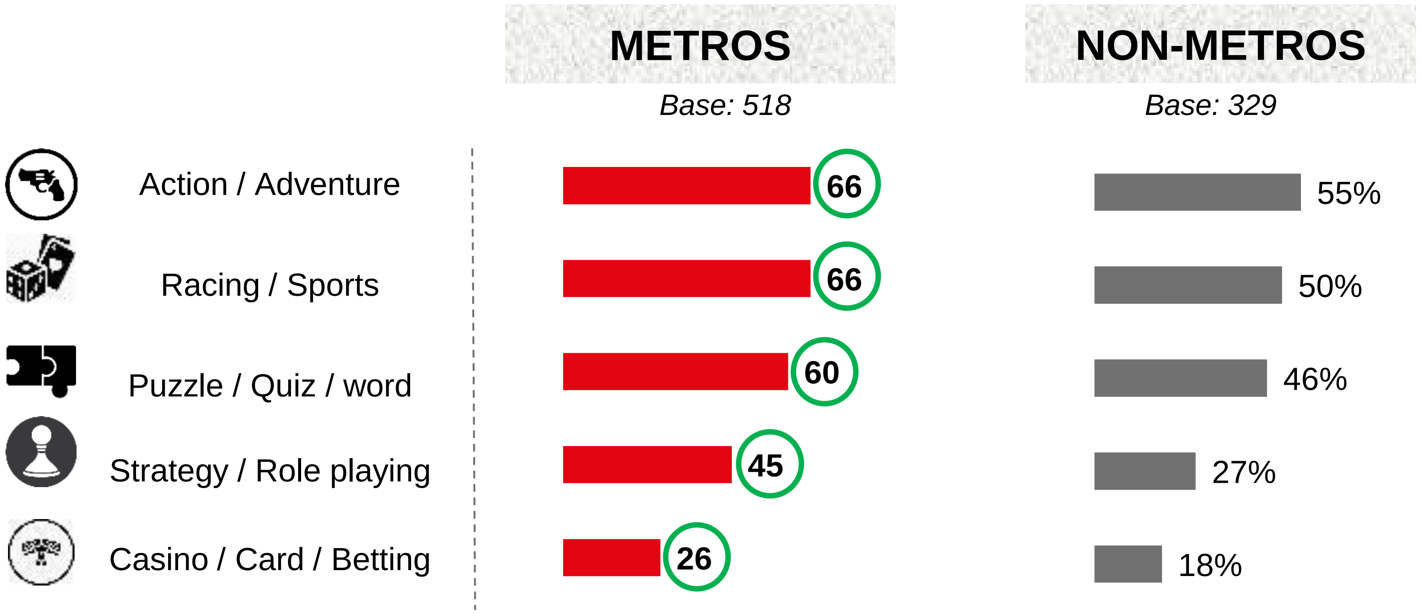
	Metro	Non-metro	Male	Female	15-19yrs	20-24yrs	25- 34yrs	35+yrs
Base:	***518***	***329***	***627***	***220***	***214 (A)***	***233 (B)***	***230 (C)***	***170 (D)***
At home	88	84	89	80	86	87	89	84
Travelling	51	29	41	45	29	50 A	46 A	43 A
At college	19	9	16	13	19 CD	24 CD	5	11
At work/office	18	8	15	13	7	17 A	16 A	18 A

All figs are in %

While all the cohorts majorly prefer to play games when they at home; in the metro cities gamers who play games while traveling, at college and at work/office is significantly higher than the non-metro gamers. Except the lower age group of 15-19yrs, gamers in the remaining age cohorts who play while travelling and at work are significantly higher.

Base (All): 847
Kantar IMRB and Pokkt survey, 2018
Highlighted in green: Significantly higher at 95% CI

Gaming genre selection not specific to town-class



Top three genres remain the same in the metros as well as non-metros. However, the gamers across every genre metro cities is significantly higher than that of non-metros

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Highlighted in green: Significantly higher at 95% CI

Triggers across cohorts

	Metro	Non-metro	Male	Female	15-19yrs	20-24yrs	25- 34yrs	35+yrs
Base:	***518***	***329***	***627***	***220***	***214 (A)***	***233 (B)***	***230 (C)***	***170 (D)***
Stress buster	64	51	57	64	46	59	68 AB	63 A
Kills boredom	59	38	50	53	46	55	53	50
Popularity of a game	47	33	44	34	45 C	50 CD	34	36
Setting a high score / competing with others	44	30	38	40	34	44 A	37	40
Part of my daily schedule	32	22	26	34	20	36 AC	27	28
Social Interaction	27	18	23	24	21	28 C	19	27

All figs are in %

All the reasons for triggering a gamer to play mobile game in a metro city is higher than that of a non-metro city. *Popularity of a game* is a strong driver among male gamers vis-à-vis a female gamers. On the other hand, female gamers who play games because it is a *part of their daily schedule* is considerably higher than male gamers

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Highlighted in green: Significantly higher at 95% CI

Across cohorts, what are barriers for playing games?

Barriers for playing games	Metro	Non-metro	Male	Female	15-19yrs	20-24yrs	25- 34yrs	35+yrs
Base:	***131***	***132***	***222***	***41***	***73***	***66***	***82***	***42***
I have a very busy schedule	32	30	30	37	29	33	28	38
It is a waste of time	25	34	31	24	21	33	34	31
Gaming consumes a lot of battery	21	21	20	27	18	23	21	24
Mobile games are addictive	17	19	18	20	16	18	17	21
Uses too much storage / memory on your phone	18	16	16	22	10	17	22	21
High data consumption	10	14	11	17	4	9	16	24
Screen size is small	9	13	11	10	21	8	10	2
Games on mobile stutter / freeze / hang	10	13	11	12	11	15	10	10
Buying games are too costly	5	8	6	10	4	5	5	17
My handset does not support gaming apps I like	3	6	5	5	4	5	5	5
User controls are difficult to be operate	3	4	4	2	3	5	2	5

All figs are in %

Base (those who have not played games in the last 3 months) - 263
Kantar IMRB and Pokkt survey, 2018
Highlighted in green: Significantly higher at 95% CI

Google Play Store and social media platforms serve as the best medium to learn about new games across cohorts.

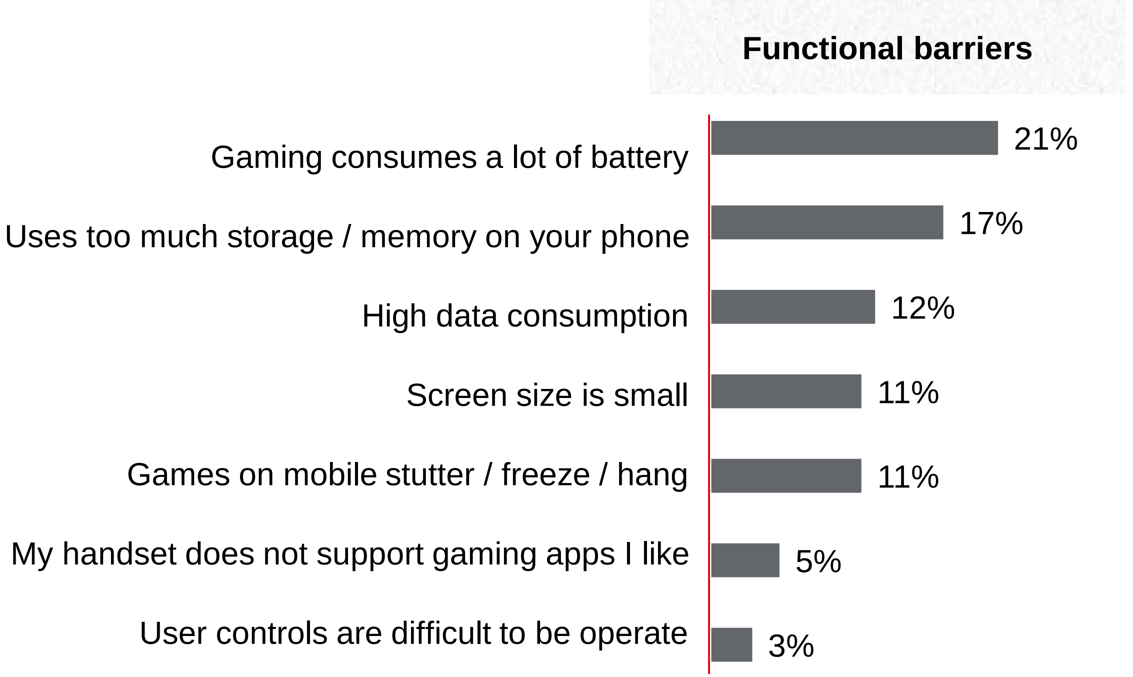
	Metro	Non-metro	Male	Female	15-19yrs	20-24yrs	25- 34yrs	35+yrs
Base:	***518***	***329***	***627***	***220***	***214 (A)***	***233 (B)***	***230 (C)***	***170 (D)***
Google Play store	76	70	76	67	71	81 ACD	73	66
Social media	56	39	47	56	38	52 A	53 A	55 A
Recommendations from friends /family	46	29	39	43	30	41 A	43 A	44 A
YouTube	38	36	39	31	41 C	41 C	29	38
Ads while playing games	34	22	24	44	18	29 A	34 A	37 A
Ads while accessing non - gaming apps	21	13	16	24	12	20 A	16	26 AC
Gaming forums	22	11	19	15	15	18	19	18

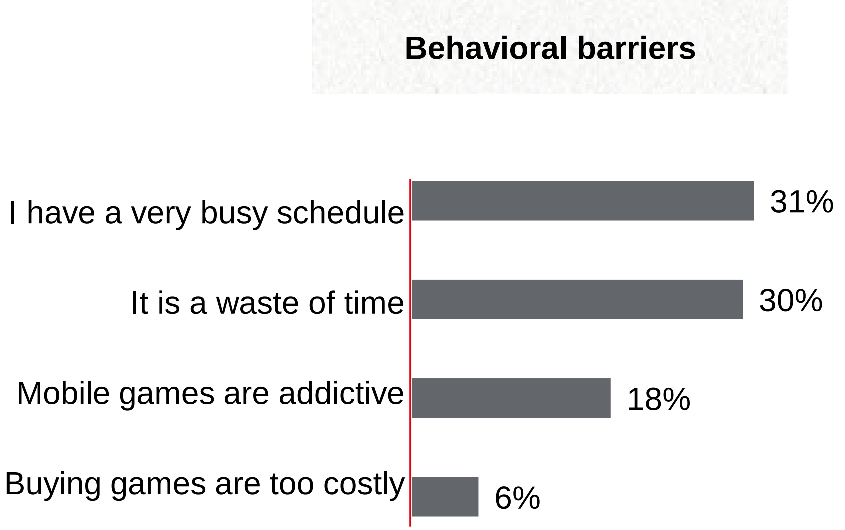
All figs are in %

Metro gamers are highly influenced by most of the mediums when compared to non-metro gamers. Male gamers are significantly impacted by both Google Play Store and YouTube vis-à-vis their female counterparts. Female gamers are highly impacted by social media, Ads displayed on the apps (while both playing games and while accessing non-gaming apps)

Base (All): 847
Kantar IMRB and Pokkt survey, 2018
Highlighted in green: Significantly higher at 95% CI

Hardware, time constraints – biggest barriers





Only a mere 6% of gamers perceive buying games to be costly; implying cost is not a hindrance for gamers to buy games. Functional aspects like huge battery consumption, memory usage are the top 2 reasons for not playing games.

One of the key barriers among gamers not playing games is that they are afraid of spending far too much time in gaming.

Base (those who have not played games in the last 3 months) - 263
Kantar IMRB and Pokkt survey, 2018

‘Removing ads’ – Not many gamers pay for this

66% Gamers spend to unlock the next stage of the game and to reach the next level

61% Second reason for making spends is to buy upgrades for performance enhancements

51% About half of the gamers spend to make aesthetic changes/enhancing the appearance of player in the game

32% Only one in three spend to remove ads while playing games

Advertisers can benefit from the fact that only one in three gamers pay for removing ads from the gaming apps.

Most of the in-game purchases are made in order to reach the next level while playing and for making upgrades / performance enhancements

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Perception of gaming ads basis the types of games downloaded

	Free to play games (A)	Freemium games (B)	Pay to play games (C)
	Base: 778	*Base: 235*	*Base: 93*
Gaming ads are more personalized than TV / Print ads *(Top 2 box – completely agree and somewhat agree)*	**47%**	**63% A**	**71% A**

Gamers who download freemium games and pay to play games perceive gaming ads to be more personalized is significantly higher than gamers who download free to play games

Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Highlighted in green: Significantly higher at 95% CI

Is there any difference between the genres played?

	Free to play games	Freemium games	Pay to play games
Base:	***778 (A)***	***235 (B)***	***93 (C)***
Action / Adventure	61	84 A	84 A
Racing / Sports	61	74 A	81 A
Puzzle / Quiz / word	57	56	58
Strategy / Role playing	37	61 A	63 A
Casino / Card / Betting	22	34 A	47 AB

All figs are in %

Freemium and pay to play gamers show significantly higher preference to play action / adventure, racing, strategy and casino games than gamers who download free to play games. Gamers who download pay to play games are highly likely to play casino games than the other two cohorts.

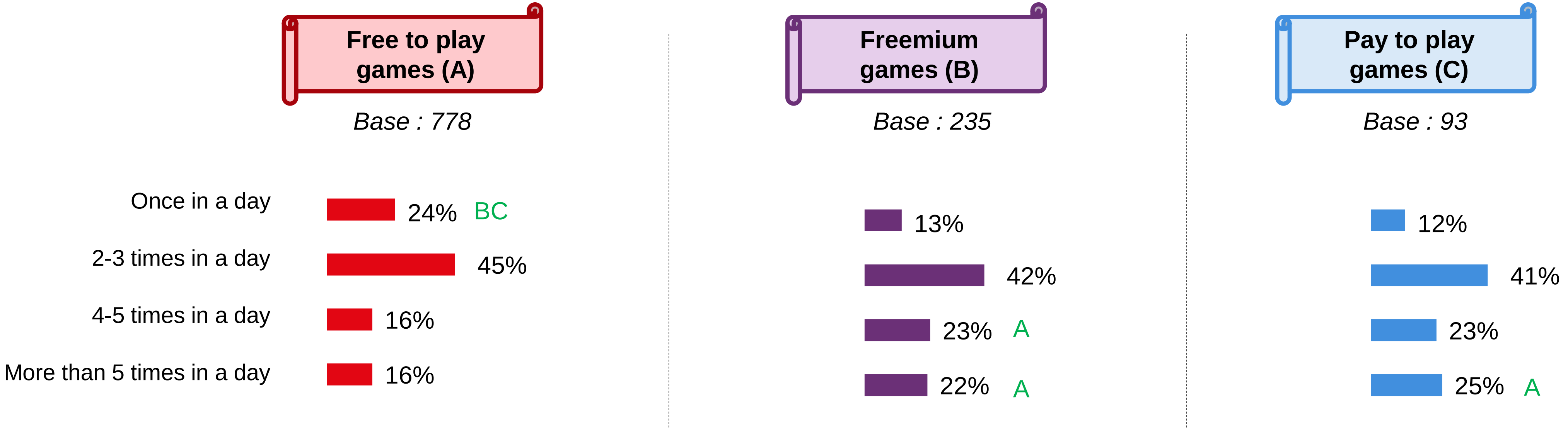
Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Highlighted in green: Significantly higher at 95% CI

Gamers paying for games are glued to gaming

Gamers who pay for buying games are highly likely to spend more time playing it. Freemium gamers (who download the games for free but eventually make purchases for enhancements or unlocking the next stage) and pay to play gamers (who pay upfront for downloading / accessing the game) play at least five times in a day which is significantly higher than the gamers who download free to play games.

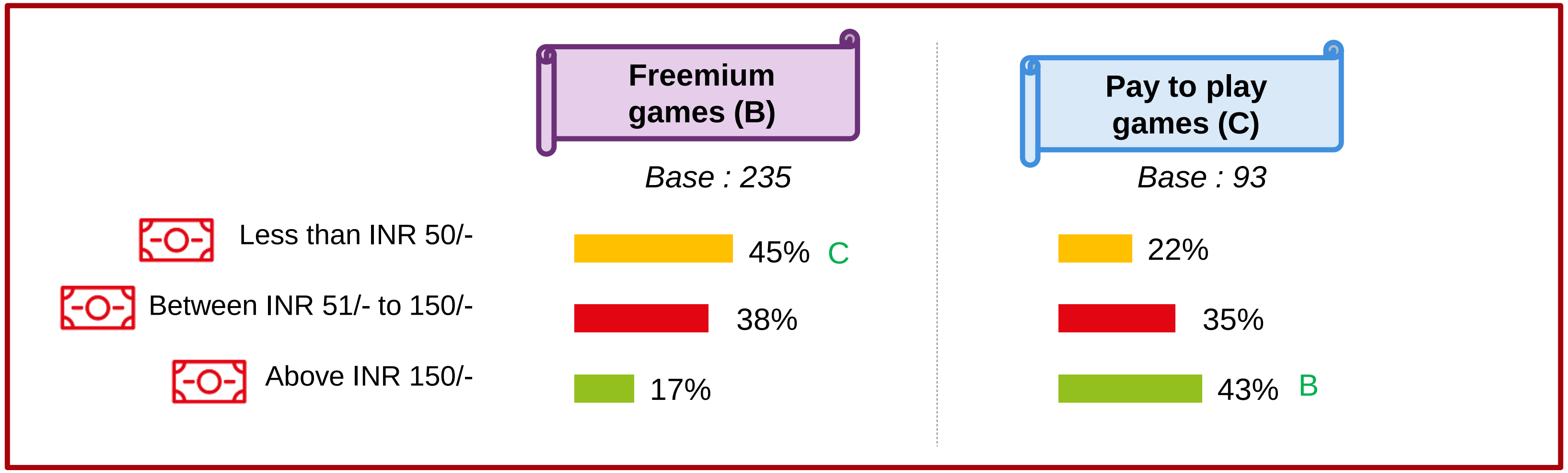
Gamers downloading free to play games on the other hand are highly likely to play games once in a day.



Base (All): 847
Kantar IMRB and Pokkt survey, 2018

Highlighted in green: Significantly higher at 95% CI

Pay to play gamers are willing to spend more than INR 150/- for buying games



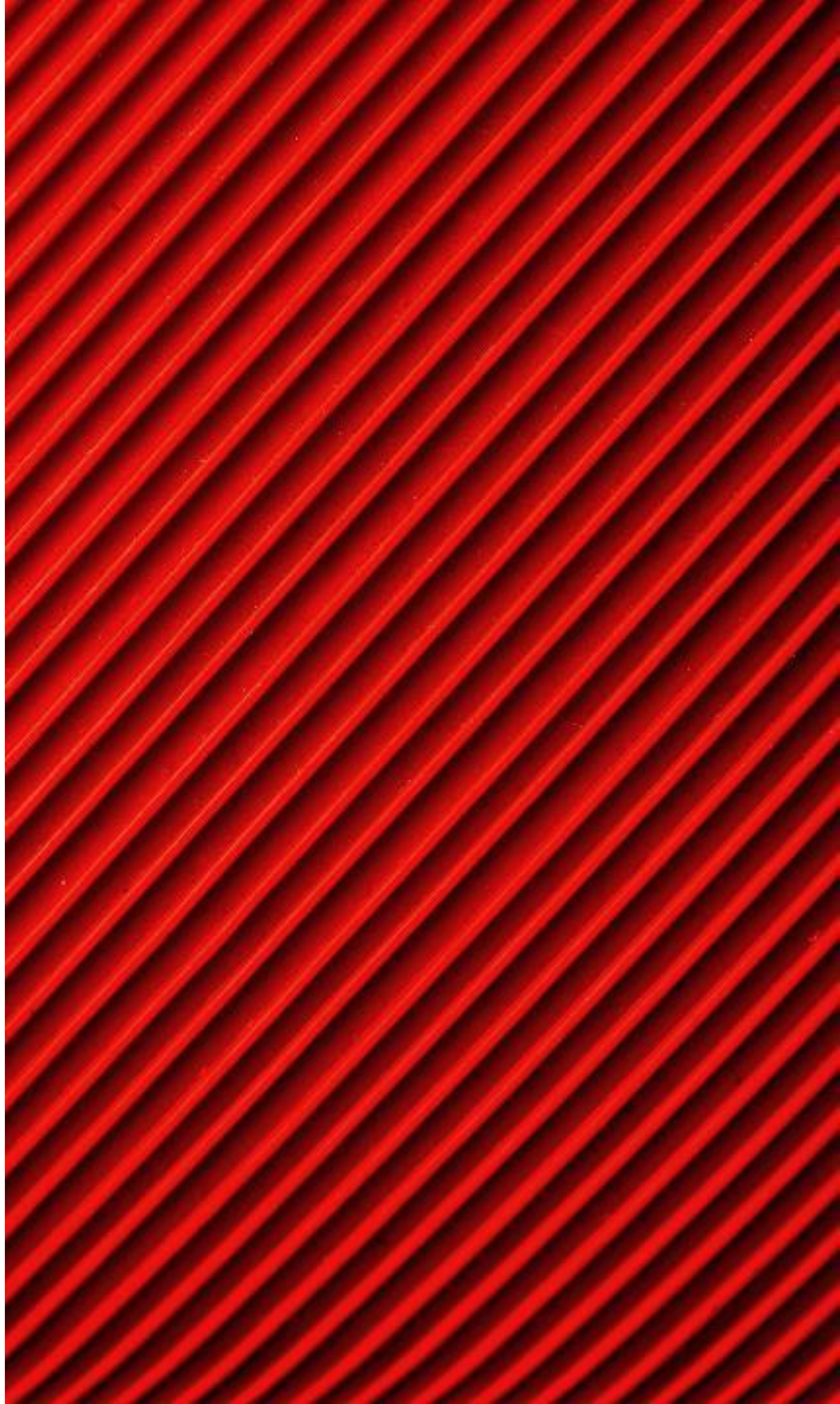
The spending behaviour among those who play free to play games and freemium games is similar with higher inclination of spends up to INR 150/-. Gamers who buy games while downloading it for the first time (pay to play gamers) are significantly higher to spend above INR 150/- than the other cohort.

Kantar IMRB and Pokkt survey, 2018

Highlighted in green: Significantly higher at 95% CI

KANTAR IMRB

Understanding our research approach



Our Approach

Kantar IMRB's approach

A dual research approach was considered to conduct online surveys (using structured questionnaire) among mobile gamers and a secondary layer of desk research was taken into account in order to have a holistic view of the mobile gaming industry in India.

ONLINE SURVEY + **SECONDARY RESEARCH** = **Comprehensive understanding of Indian mobile gaming industry**

Target Group *(Whom did we reach out to?)*

- Mobile gamers (who have played online/offline mobile games in the last 3 months)
- Respondents in the age group of 15+
- Male and Female (quotas were maintained)

Markets taken into consideration

- Metros (Mumbai, Delhi, Hyderabad, Kolkata, Chennai, Pune, Ahmedabad, Bangalore)
- Non-metros (Rest of India)

ABOUT KANTAR IMRB

Kantar IMRB is a pioneer of market research services in Asia. It partners its clients across the entire brand lifecycle through a unique mix of innovation and analytical thinking to design customised solutions that deliver maximum impact. By leveraging on its large array of syndicated services and specialist divisions, Kantar IMRB helps clients in crafting marketing and consumer strategies. With a multi-disciplinary and multi-cultural workforce, it is at the forefront of research and consulting services.

Kantar IMRB has been a leader in setting up industry measurements like for Television (Television Ratings Point), Household purchases of FMCG's (Kantar World Panel), Digital (I Cube), Online audiences (WAM) and Mobile usage (Mobi Trak)

An eight-time recipient of "Agency of the Year", Kantar IMRB's footprint extends to 50 offices across 12 countries.

Visit: www.imrbint.com for more information

About Kantar

Kantar is one of the world's leading data, insight and consultancy companies. Working together across the whole spectrum of research and consulting disciplines, it's specialist brands employ30,000 people, provide inspirational insights and business strategies for clients in 100 countries. Kantar is part of WPP and it's services are employed by over half the Fortune 500.

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THANK YOU

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