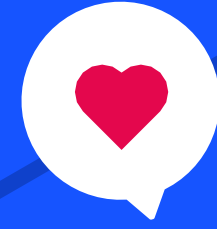


EVERYONE'S GAMING AMONG US

Mobile Gaming through the Pandemic and
Beyond

2021 Mobile Gaming Report, India



ABOUT THE REPORT

The following report is based on a detailed analysis of a survey conducted in India between 9th Feb – 16th Feb 2021 on the InMobi Pulse Platform along with data from the InMobi Advertising and Audiences Platform. The analysis explores the mobile advertising opportunity in the mobile gaming space in India. The analysis is based on data from Jan 2020 to Jan 2021 (over 1.7 trillion auctions) and highlights gaming personas, advertiser insights and the performance of different ad experiences in the gaming category.

INMOBI

Consumer Research

INMOBI

Pulse

Audience Insights

INMOBI

Audience
Intelligence

Advertising Insights

INMOBI

Marketing
Cloud

RESEARCH METHODOLOGY

INMOBI
Pulse

The Leading
Mobile
Consumer
Intelligence
Platform



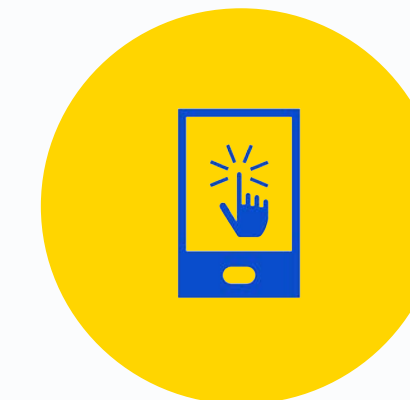
A mobile survey conducted using
InMobi Pulse



A sample of n=1000+ Indian
smartphone users



Respondents recruited programmatically via
the InMobi mobile advertising platform from
February 9–16, 2021



Results targeted and weighted to be
representative of India's smartphone
population

CONTENT



01

SETTING THE STAGE

02

INDIA: THE LAND OF THE COMMITTED GAMER

03

EMERGING TRENDS, LASTING BEHAVIOUR

04

GAMING ADVERTISING MYTHBUSTERS



SETTING THE STAGE

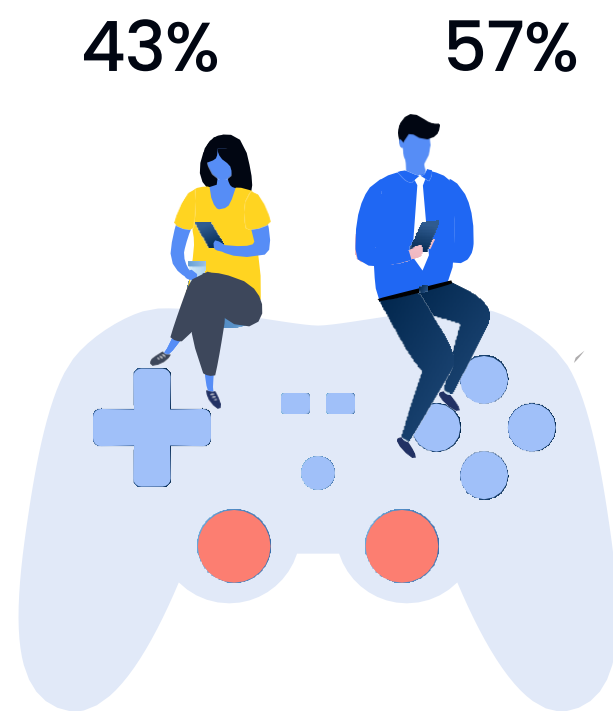
Home to 1 out of 10 gamers across the globe, India is the 5th largest mobile gaming market across the world. This boom has been made possible in large parts by access to affordable smartphones, the cheapest network data tariffs in the world, and improving mobile internet speeds.

According to some estimates, 44% of India's smartphone population will be playing games on their devices by 2022. Gaming has now achieved escape velocity in India, competing with other popular entertainment categories such as short-form video, streaming services, and social networks for user attention.

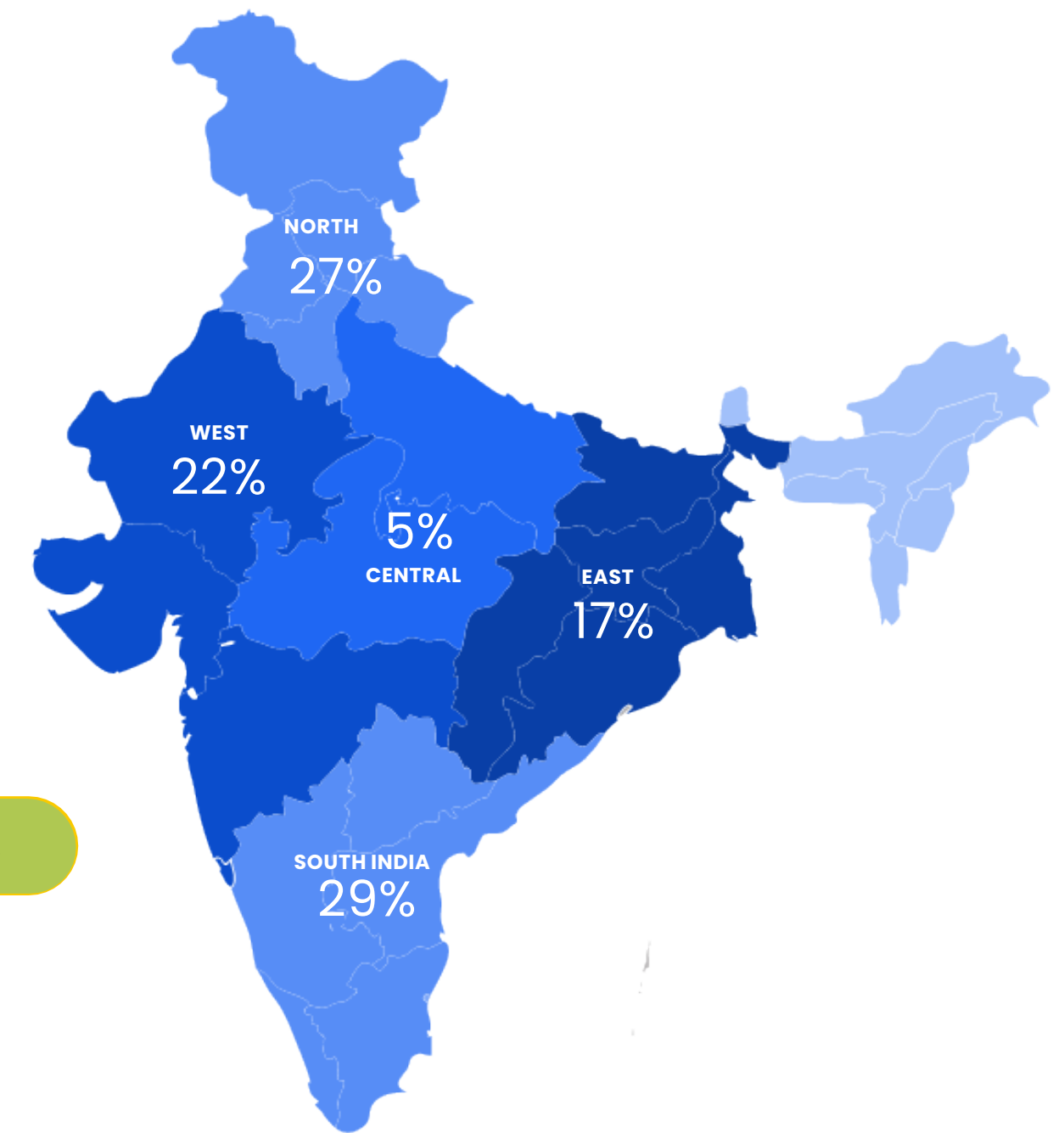
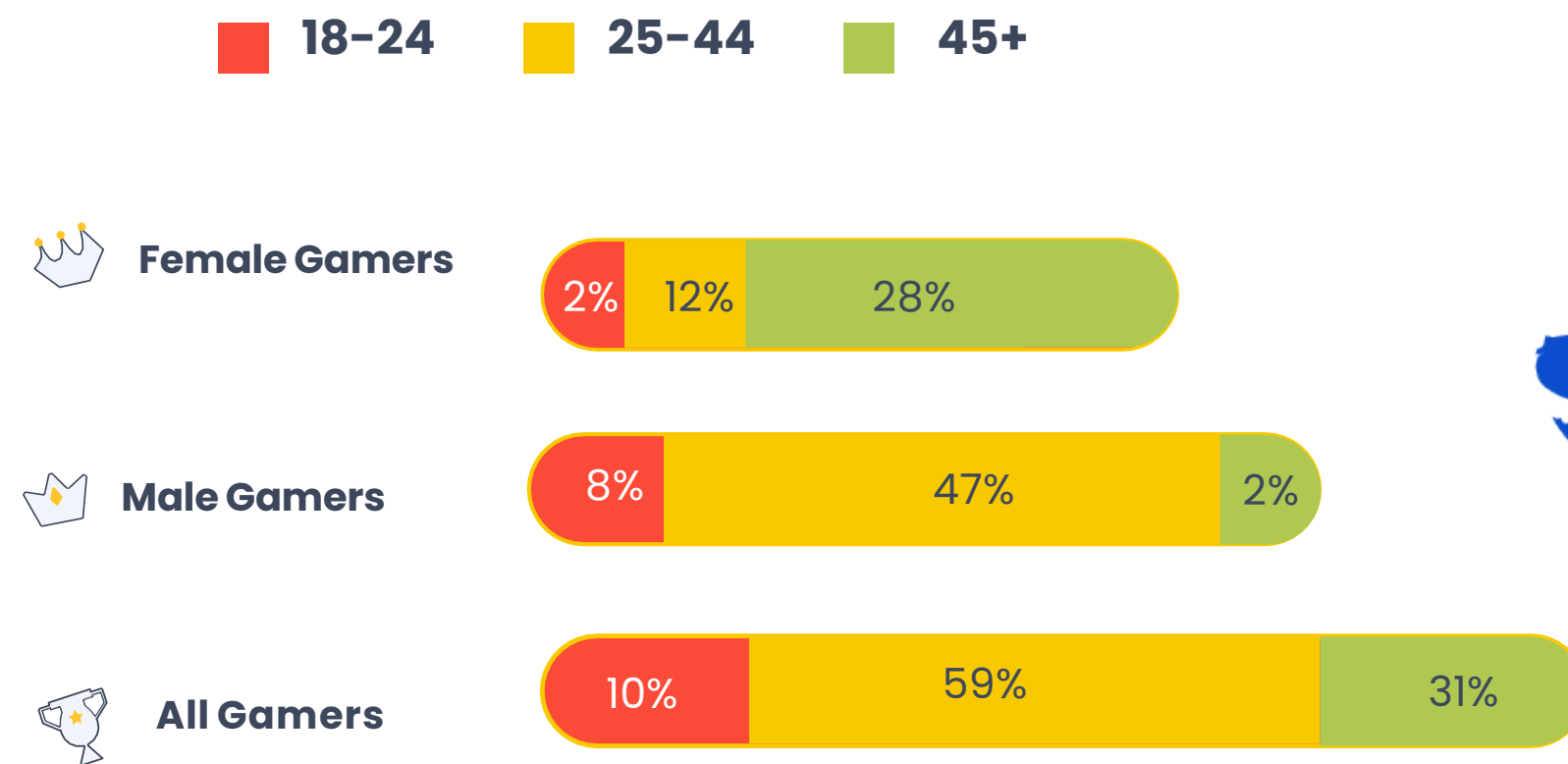


NOT JUST A YOUNG URBAN MAN'S GAME

Ditch the notion that gaming is only popular among the Gen Z men. It is equally popular among those in the age group of 45 to 54.

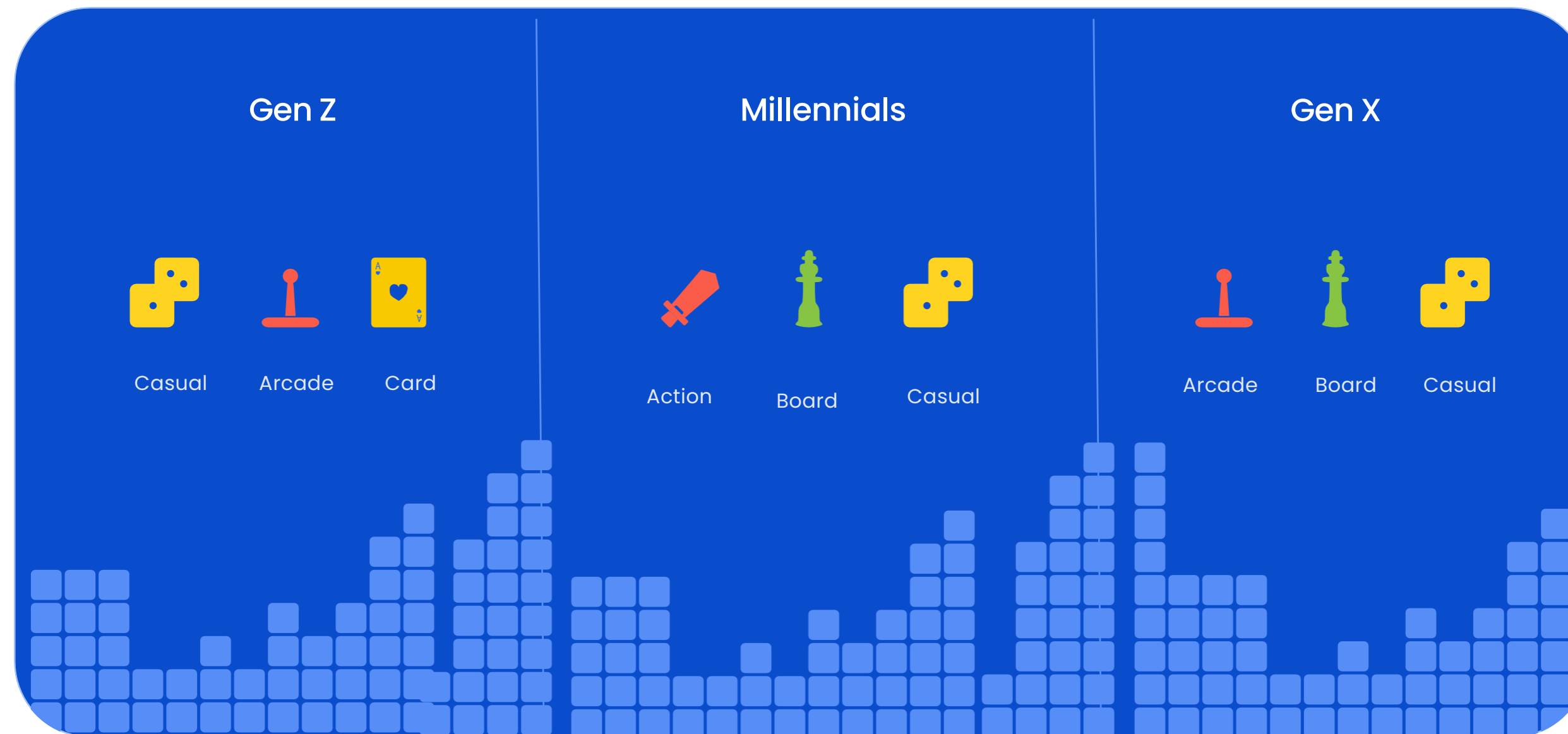


Top Gaming Audiences



NOT JUST A YOUNG URBAN MAN'S GAME

Different generations are logging on to play mobile games and their favorites include:



'GAME-ON' INDIA: THE LAND OF THE COMMITTED GAMER

With over 2.7 billion players across the world, can we place each gamer in the same category? Absolutely not. The types of gamers are about as varied as the types of games themselves. In our research we found 3 overarching themes. There are the committed gamers, the regular gamers and the occasional gamers. In this section we dive deeper into their behavior and motivations



THE LAND OF THE COMMITTED GAMER



Committed Gamers

Play once to several times a day

Regular Gamers

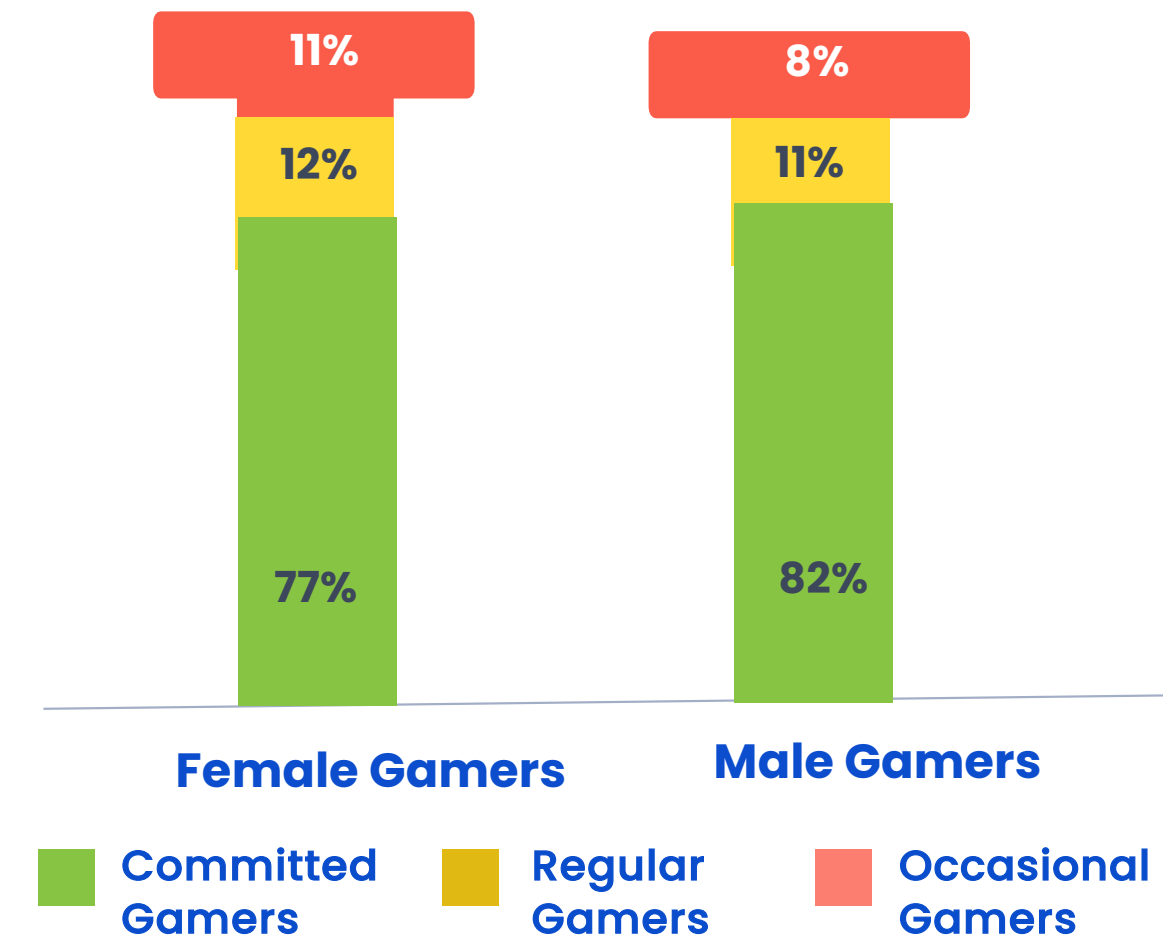
Play at least once a week

Occasional Gamers

Play once a month or less

The majority of Indians – 80% are committed gamers, playing a mobile game every day. Across age group, gender and cities, Indians love their mobile games.

Type of Gamers by Gender



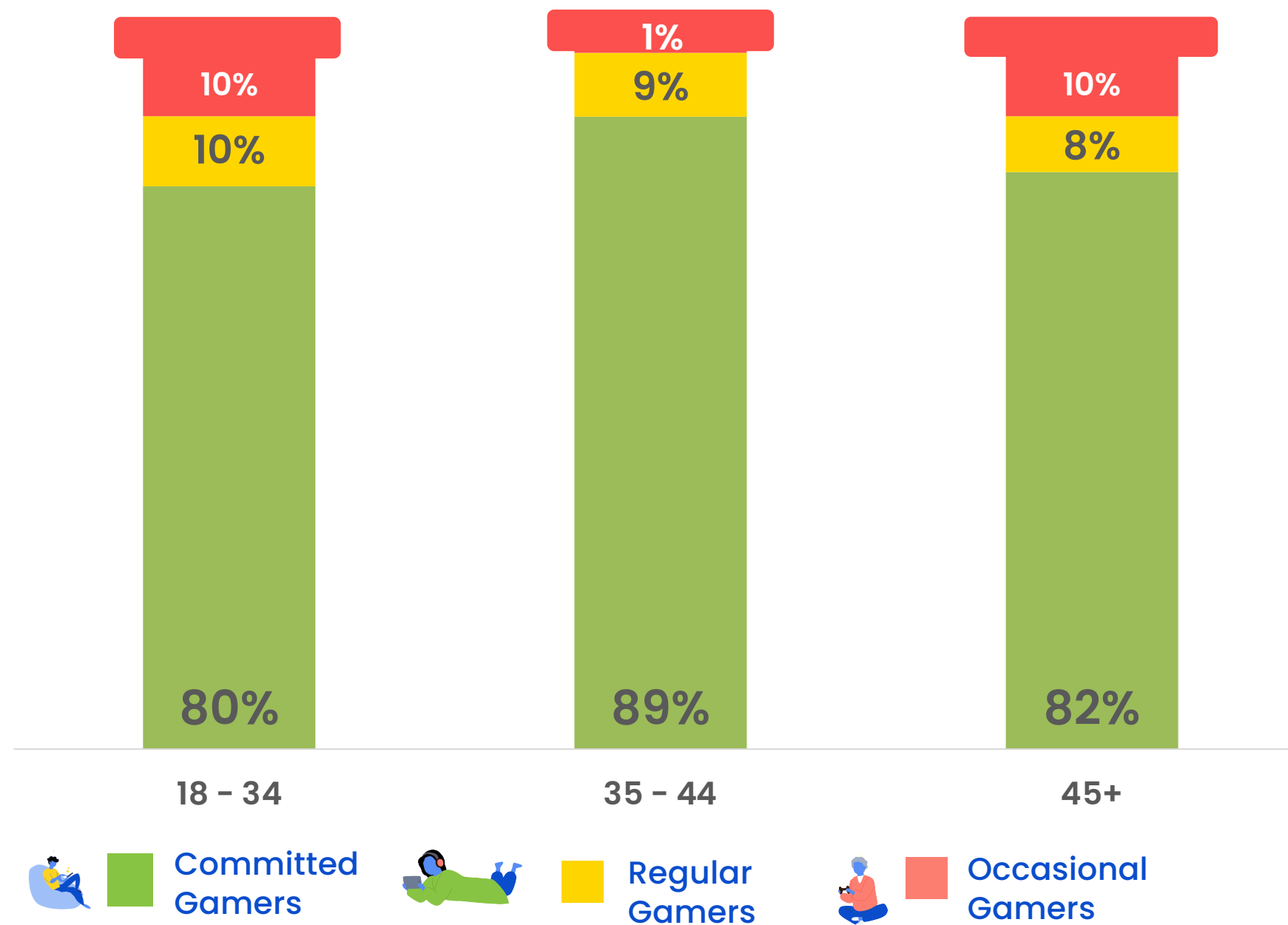
Female Gamers

Male Gamers

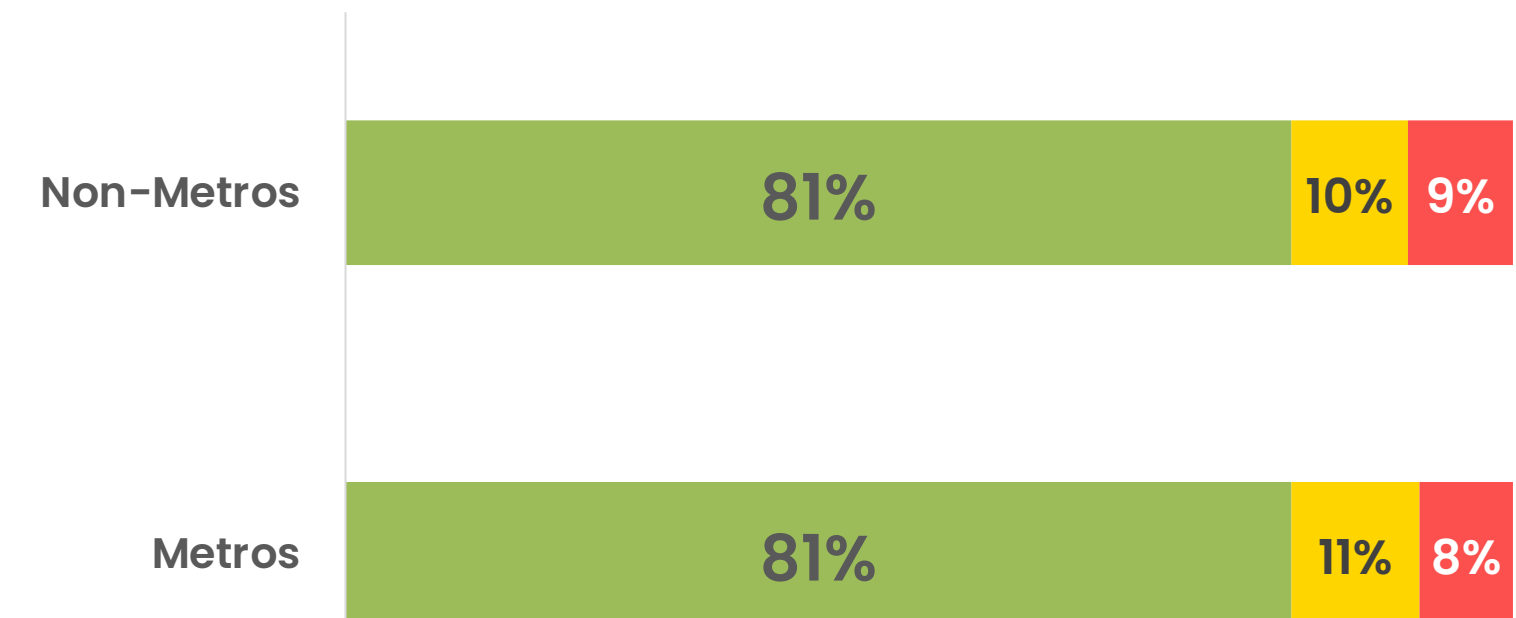
■ Committed Gamers
 ■ Regular Gamers
 ■ Occasional Gamers

THE LAND OF THE COMMITTED GAMER

Type of Gamers by Age



Type of Gamers by Location



Gaming has become a very popular source of entertainment regardless of age and location. Access to smartphones and high-speed internet have been huge drivers in bringing about this change. Gaming is now truly accessible no matter who you are or where you're from.

MOBILE GAMING = RELAXATION

Mobile Gaming has democratized playing, helping folks relax and stay entertained, unlike console gaming, where competition and winning take priority. With the rapid rise on multiplayer in app games, gaming has also become an avenue for folks to connect with friends and family, harboring a sense of community on these apps.

Top Reasons why Committed Gamers play



- ★ **Entertainment/Relaxation**
- ★ To compete and win
- ★ To improve skills

Top Reasons why Non-Metros Gamers play



- ★ **Entertainment/Relaxation**
- ★ To compete and win
- ★ To fight boredom

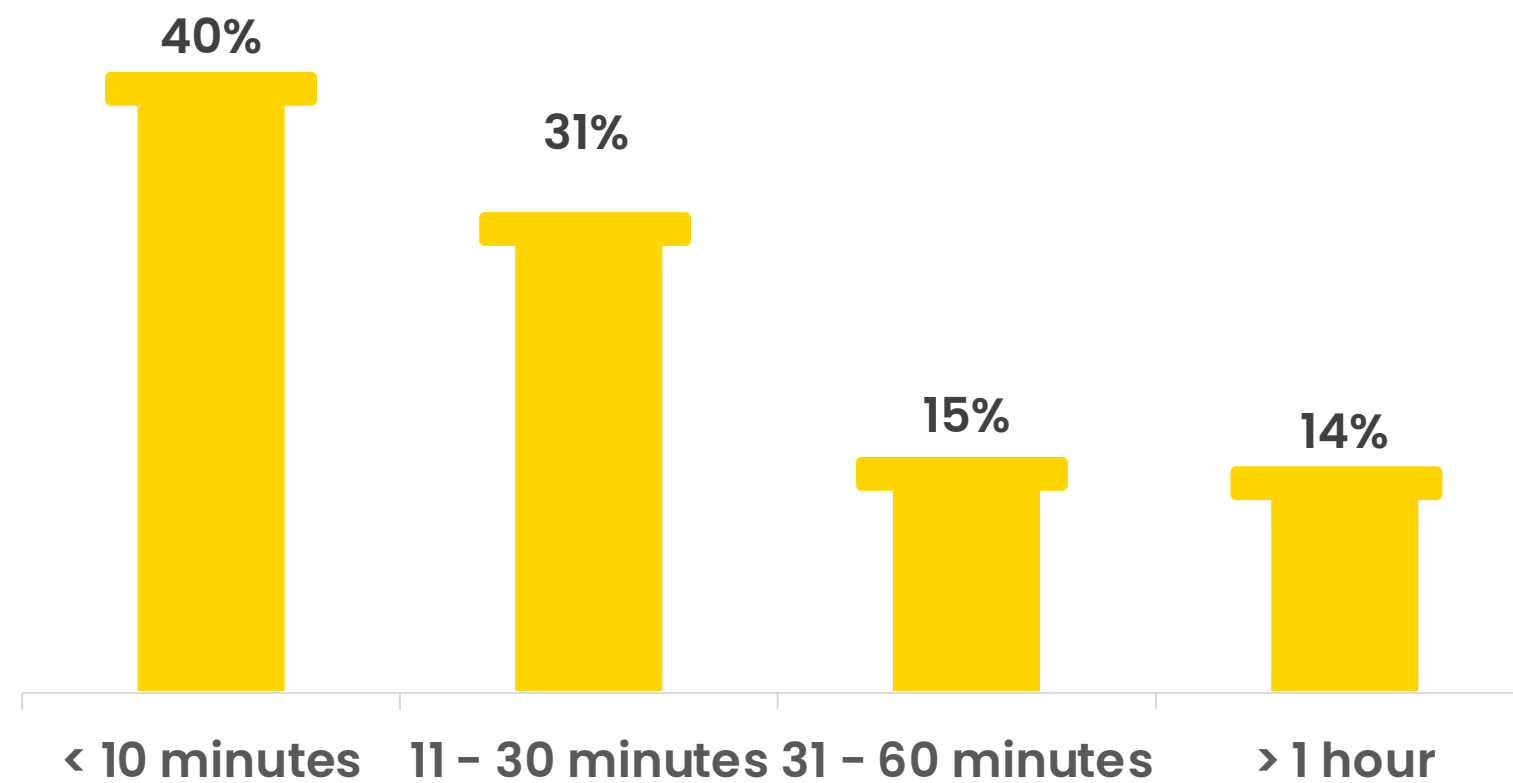
Top Reasons why Gen X (45+) Gamers play



- ★ **Entertainment/Relaxation**
- ★ To connect with friends/family
- ★ To compete and win

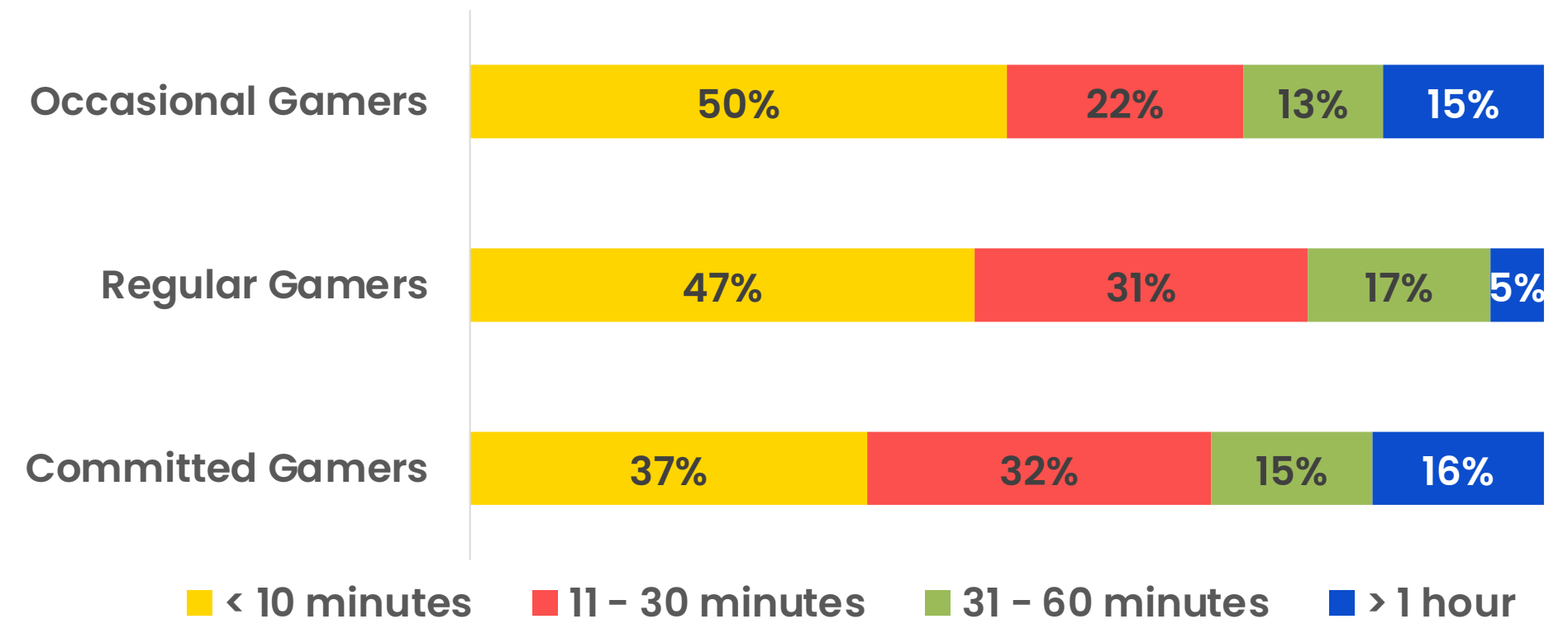
SNACKING ON MOBILE GAMING

Time Spent per Gaming Session on Smartphones



Majority of Indians play mobile games in short spurts, almost like they are snacking on it throughout the day - in between meetings, chores, meals etc.

Time Spent Per Session by Indian Gamers



Committed gamers spend substantially more time per session than other gamers, with over 84% of players spending up to an hour on mobile gaming in a single sitting.

Source: InMobi Pulse Gaming Survey India, February 2021
Q8. How long do you usually end up playing a session of game at a stretch?

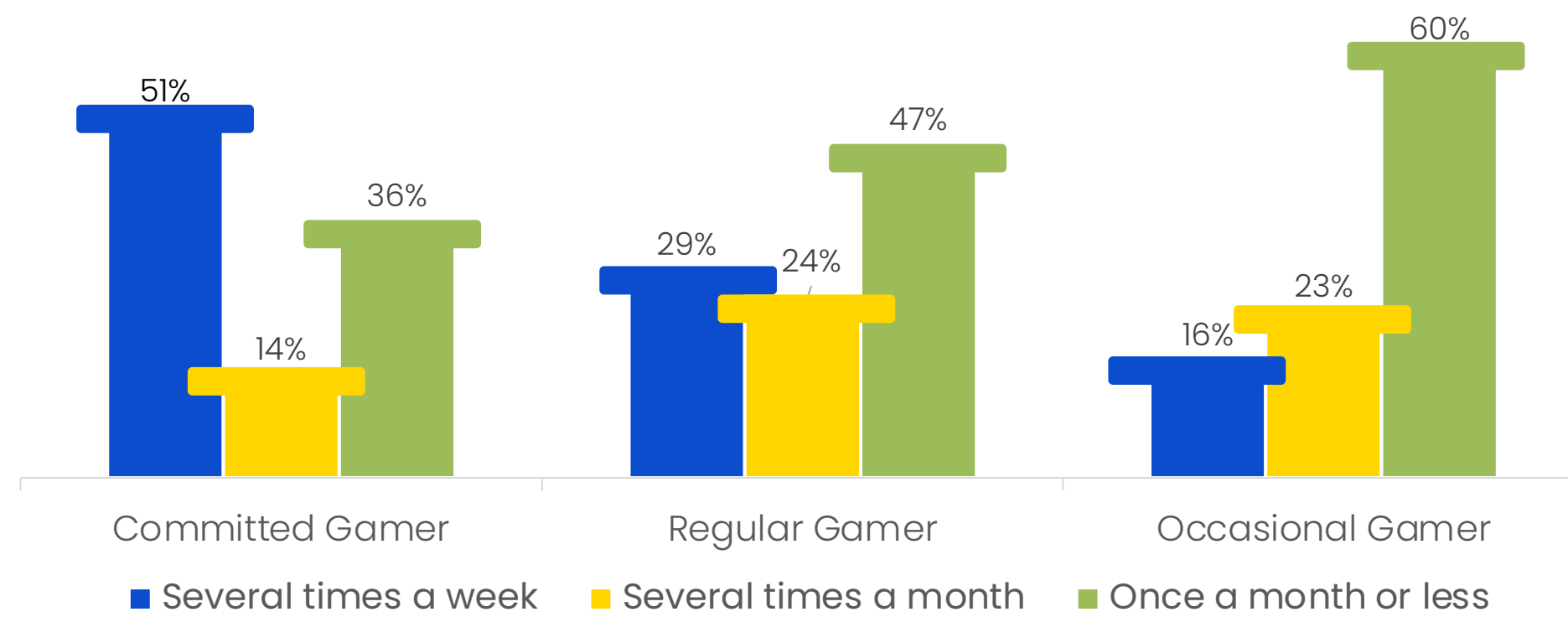
THE RACE FOR SPACE

Number of Games Installed by the Average Indian



Indian Gamers love exploring new games, especially committed gamers who play every day. These folks try new games every week compared to Regular and Occasional gamers who tend to experiment a few times a month.

Frequency of downloading new games








Nonetheless, most Indian gamers have an average of 3 games installed on their phones. Despite the availability of improved storage space on smartphones today, Indians have more apps to choose from. Combined with increasing app sizes, Indian gamers have to constantly choose between apps they can keep on their smartphones resulting in a high app churn.

GOT TO PLAY THEM ALL!








The Games that Committed Gamers Play

-  Casual
-  Card/Puzzle/Board
-  Multiplayer Online Battle Arena (MOBA)
-  Simulation/Adventure
-  Action









The Games that Non-Metro Gamers Play

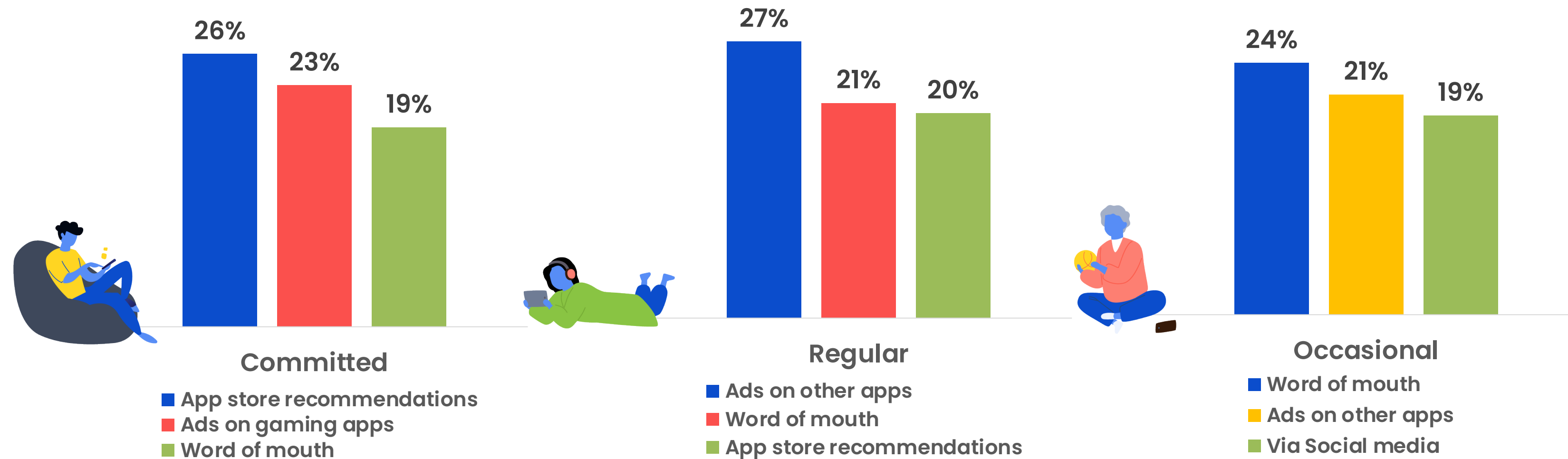
-  Card/Puzzle/Board
-  Casual Multiplayer
-  Multiplayer Online Battle Arena (MOBA)
-  Action/Arcade
-  E-Sports



The Games that Gen-Z Gamers Play

-  Multiplayer Online Battle Arena (MOBA)
-  Casual
-  Card/Board/Puzzle
-  Action/Arcade
-  Simulation/Adventure/
-  Racing

DISCOVERING NEW MOBILE GAMES



When it comes to discovering new games, each avatar has a different source they like to tap into. Committed gamers are most likely to rely on app store recommendations or ads on other gaming apps. Whereas regular gamers are far more likely to rely on in-app advertising for their next download suggestion. Occasional gamers on the other hand are far more likely to rely on word of mouth when compared to other groups as they are only interested in playing games that already enjoy a certain amount of popularity.

EMERGING TRENDS, LASTING BEHAVIOUR

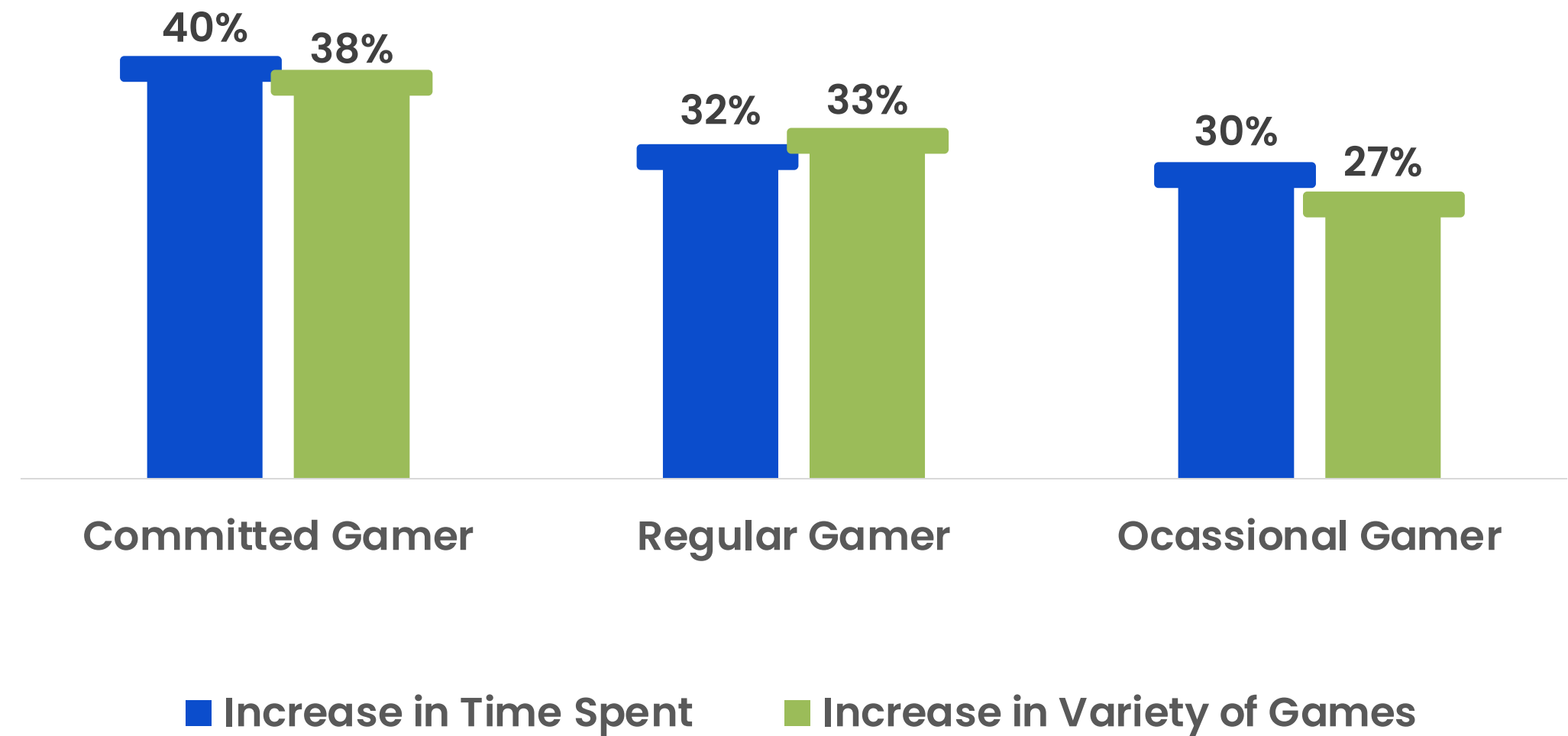
Despite many misjudging it as a fad that will go out of style over time, mobile gaming is truly here to stay. While mobile gaming accelerated during the first phase of lockdown in India, it has become a main stay in the life of the average Indian.



EMERGING TREND: ACCELERATED DEMOCRATIZATION

The onset of the pandemic in 2020 brought about a significant shift in mobile usage and consequently in mobile gaming too. A significant share of Indians took to mobile gaming in order to unwind. At the same time, time spent on mobile gaming witnessed a surge as did the number of apps Indians experimented with.

Change in Mobile Gaming Behavior by Gamer Profile

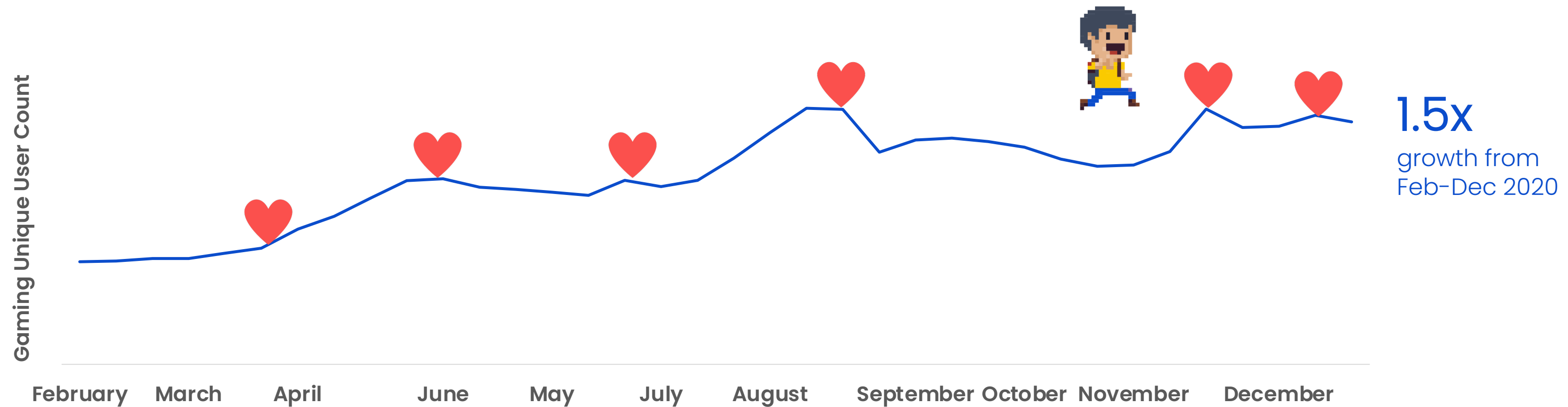


45%

Indians started playing mobile games due to the pandemic

LASTING BEHAVIOUR: GAMING APP USERS SURGE

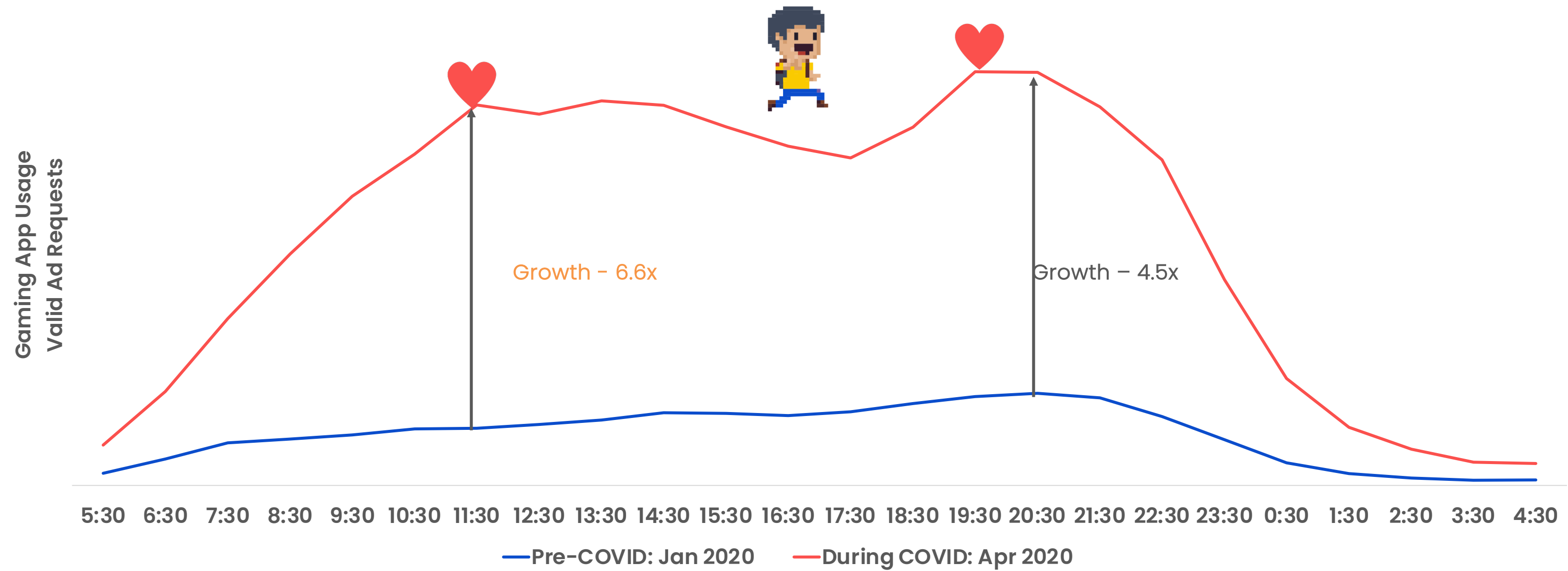
Gaming App Usage through the Pandemic



While many considered that gaming would be a fad, Indians have retained their habit of playing mobile games even much later into Jan 2021. With a 1.5X increase in the unique user count from February (pre-lockdown) to December (post lockdown) in 2020.

EMERGING TREND: INDIANS LOG ON

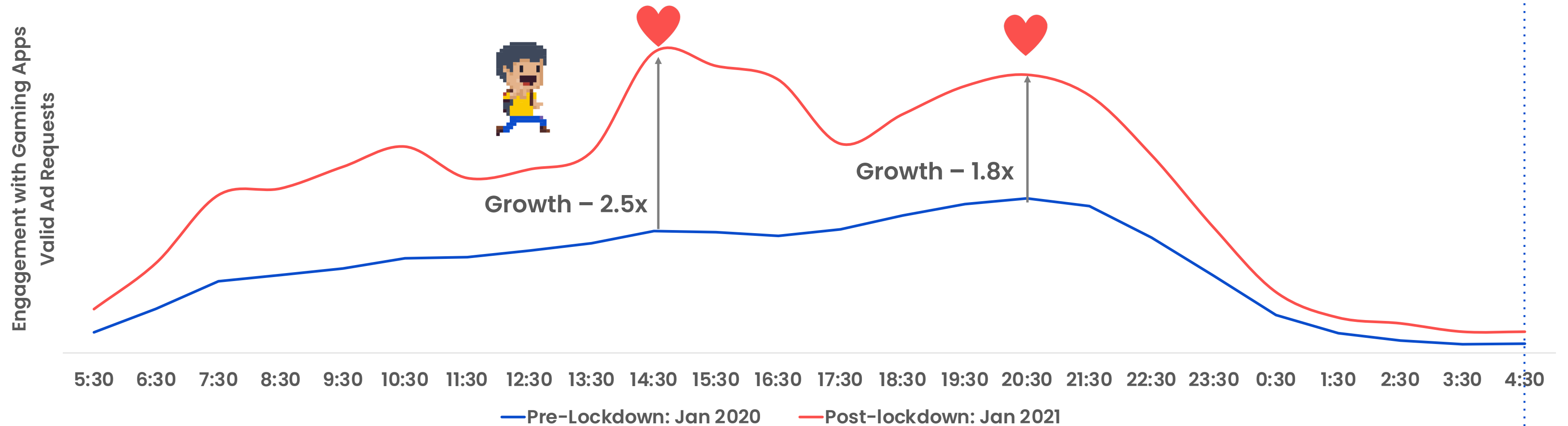
Game App usage pre-lockdown and during lockdown



Pre-lockdown, Indians would increase their game play between 4:30 – 6:30pm. However, during and post lockdown, game play declines during these hours. Pre-lockdown these hours would typically be when folks would travel back home after a long day at office. However, during lockdown, these would continue to remain work hours.

LASTING IMPACT: GAMING FINDS A PERMANENT SPOT

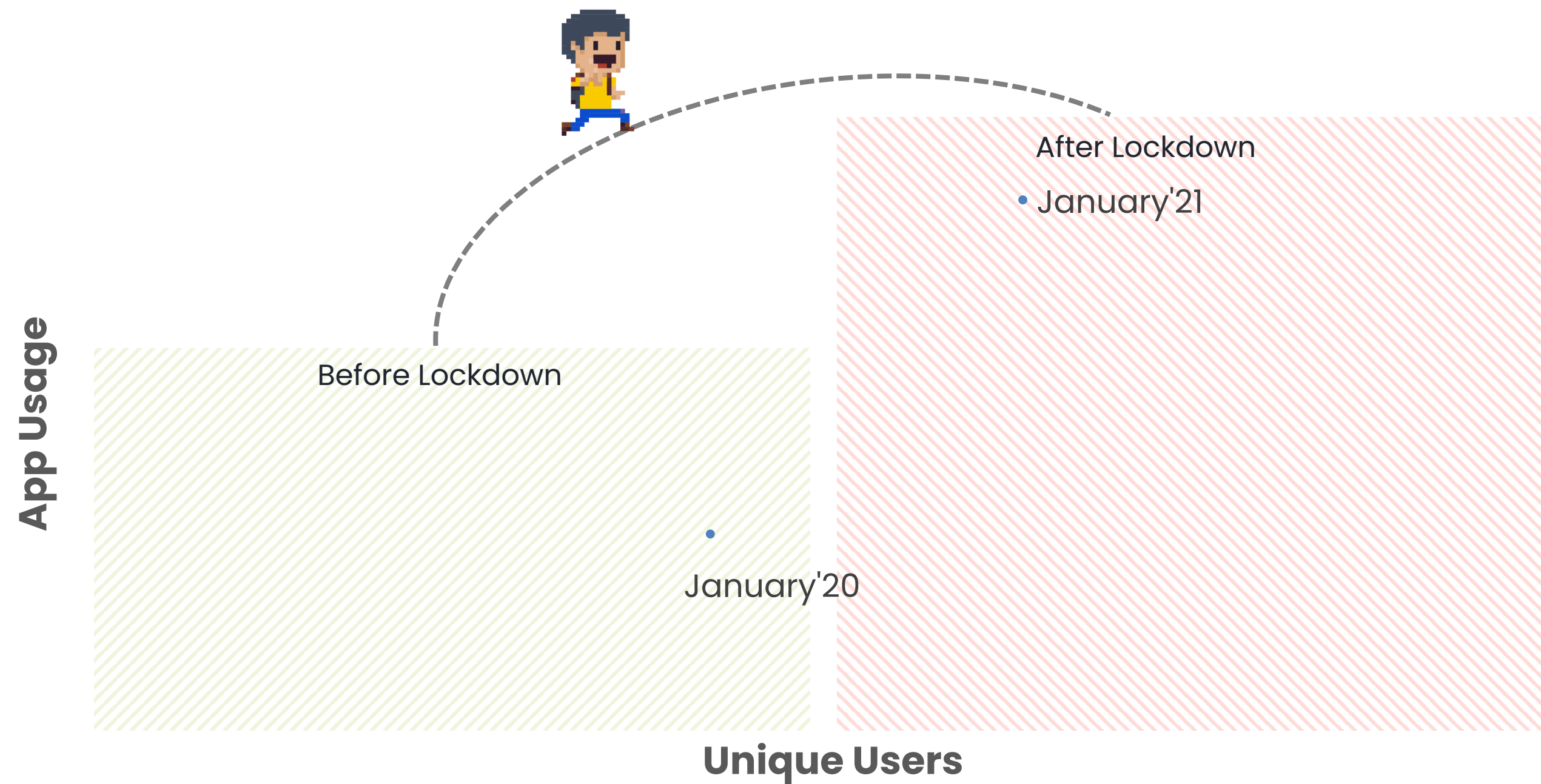
Game App usage pre and post lockdown



Indians have retained their habit of playing more mobile games which started during the pandemic, even much later into Jan 2021. Pre-lockdown, Indians would increase their game play between 4:30 – 6:30pm. However, during and post lockdown, game play declines during these hours. Pre- lockdown these hours would typically be when folks would travel back home after a long day at office. However, during lockdown, these would continue to remain work hours.

RISING THROUGH THE RANKS

Gaming Audience engagement between Jan 2020 – 2021



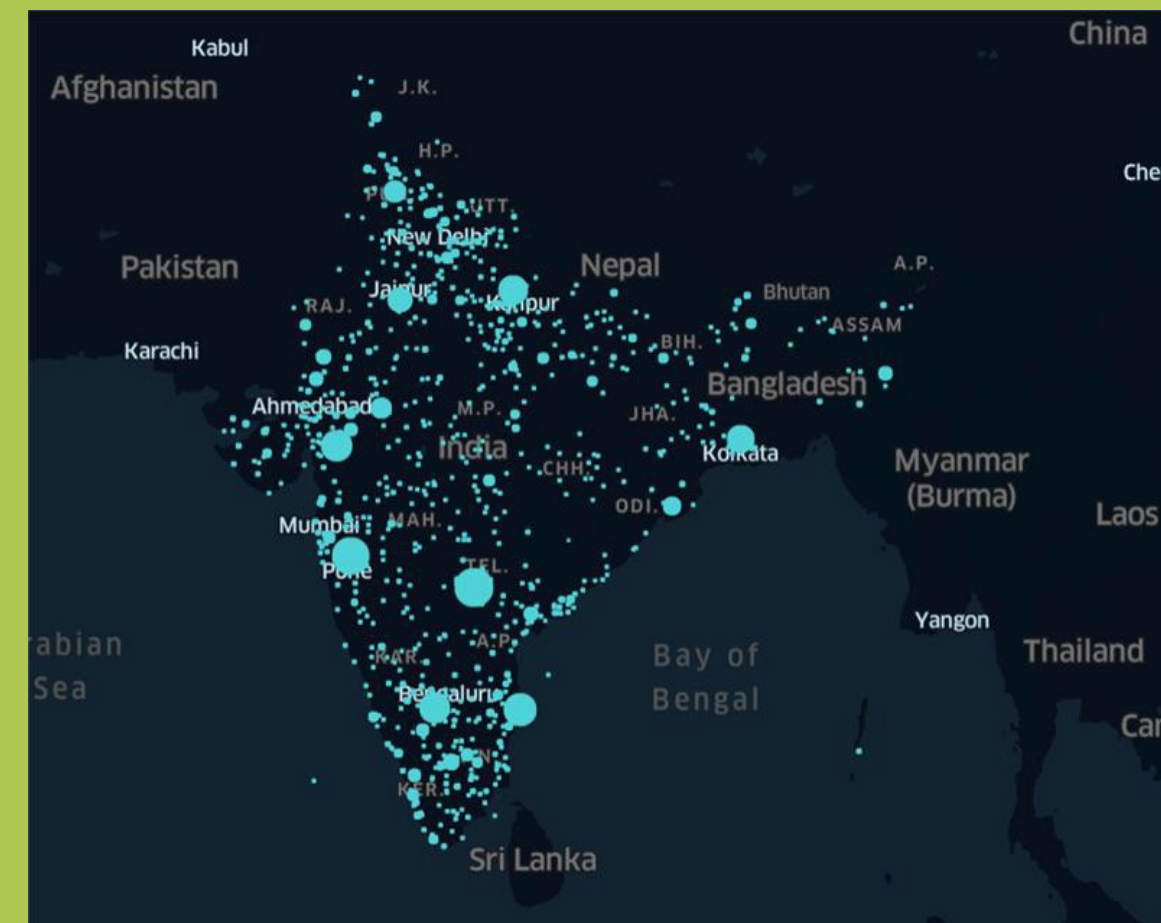
RISING THROUGH THE RANKS

Mobile Gamers in a Pre- and Post-lockdown World

January 2020



January 2021



GAMING ADVERTISING MYTHBUSTERS

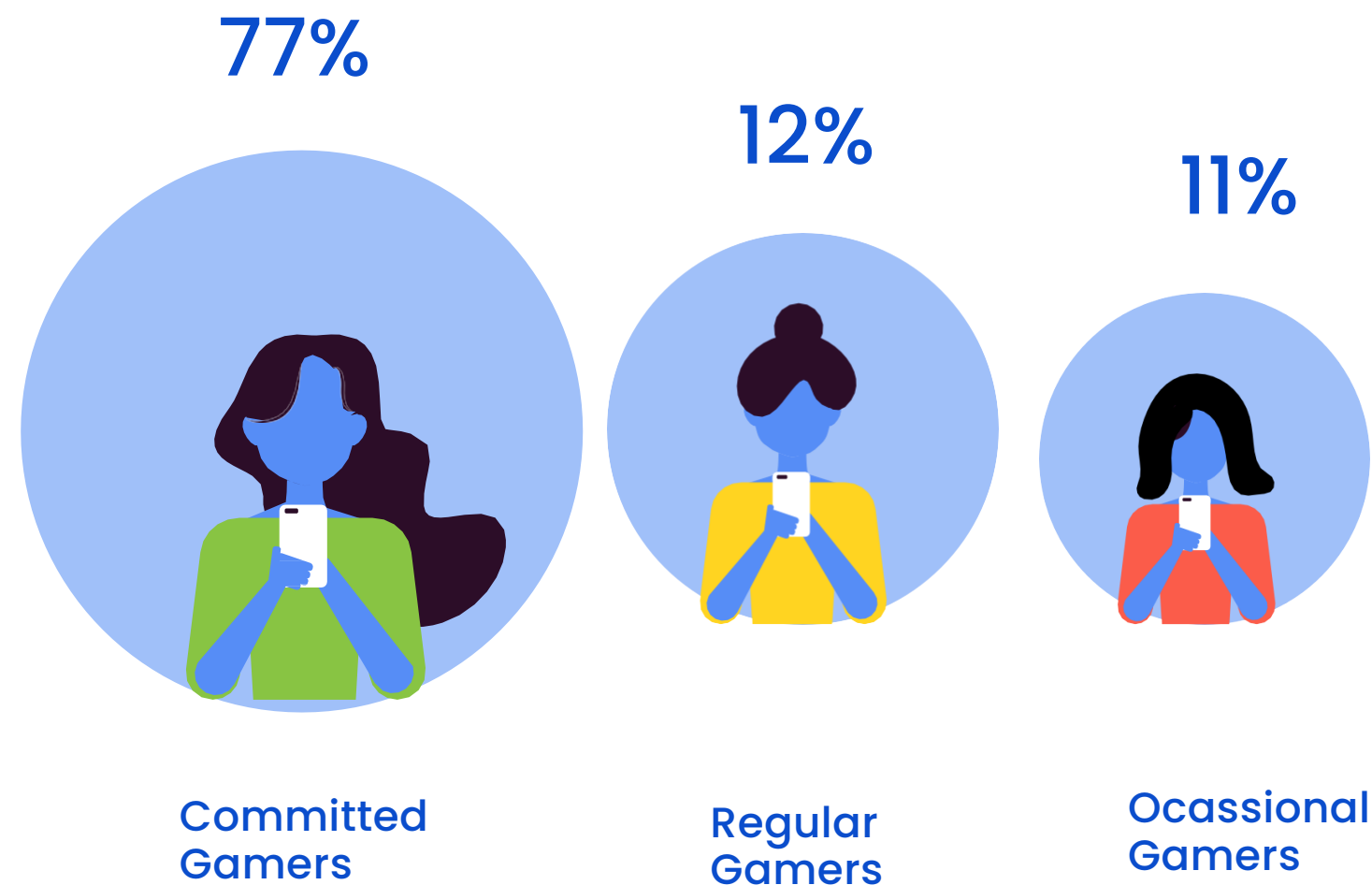
Despite the explosive opportunity right in front of them, most marketers seem to be hesitant when it comes to investing in advertising on mobile gaming. They carry misplaced notions on the lack of personas, placements, engagement, and of course brand safety – but this couldn't be further from the truth! Let's bust some of the most popular myths the advertisers hold today!



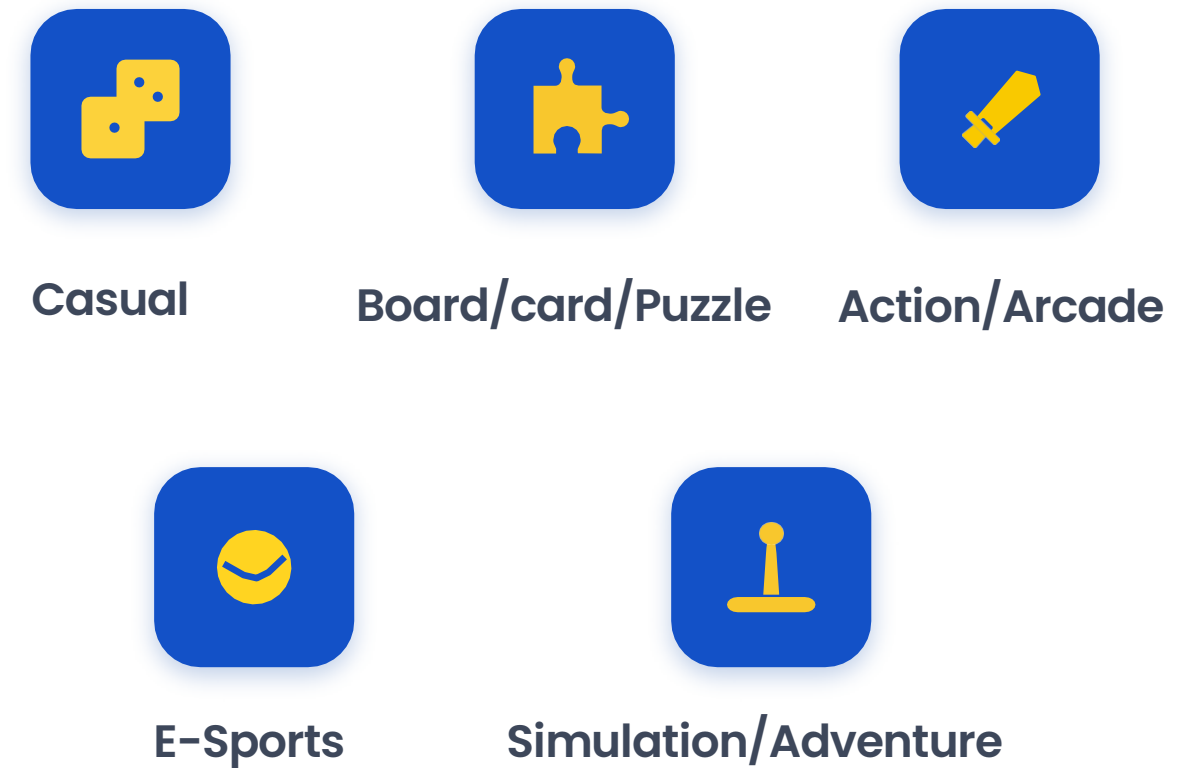
BUSTING MYTH #1: WOMEN HAVE ENTERED THE ARENA!

Mobile Gaming has seen a surge in players and usage since the onset of COVID-19 where more people are spending time indoors due to the lockdown

Women Gamers in India are highly Committed!



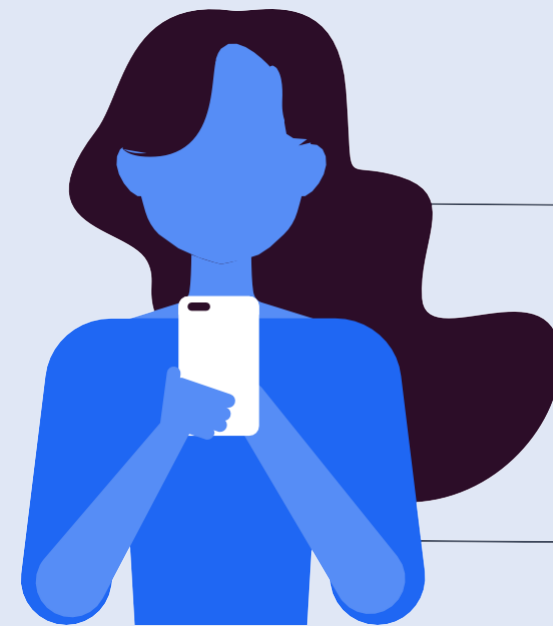
The Most Popular Mobile Games among Indian Women



BUSTING MYTH #1 WOMEN HAVE ENTERED THE ARENA!

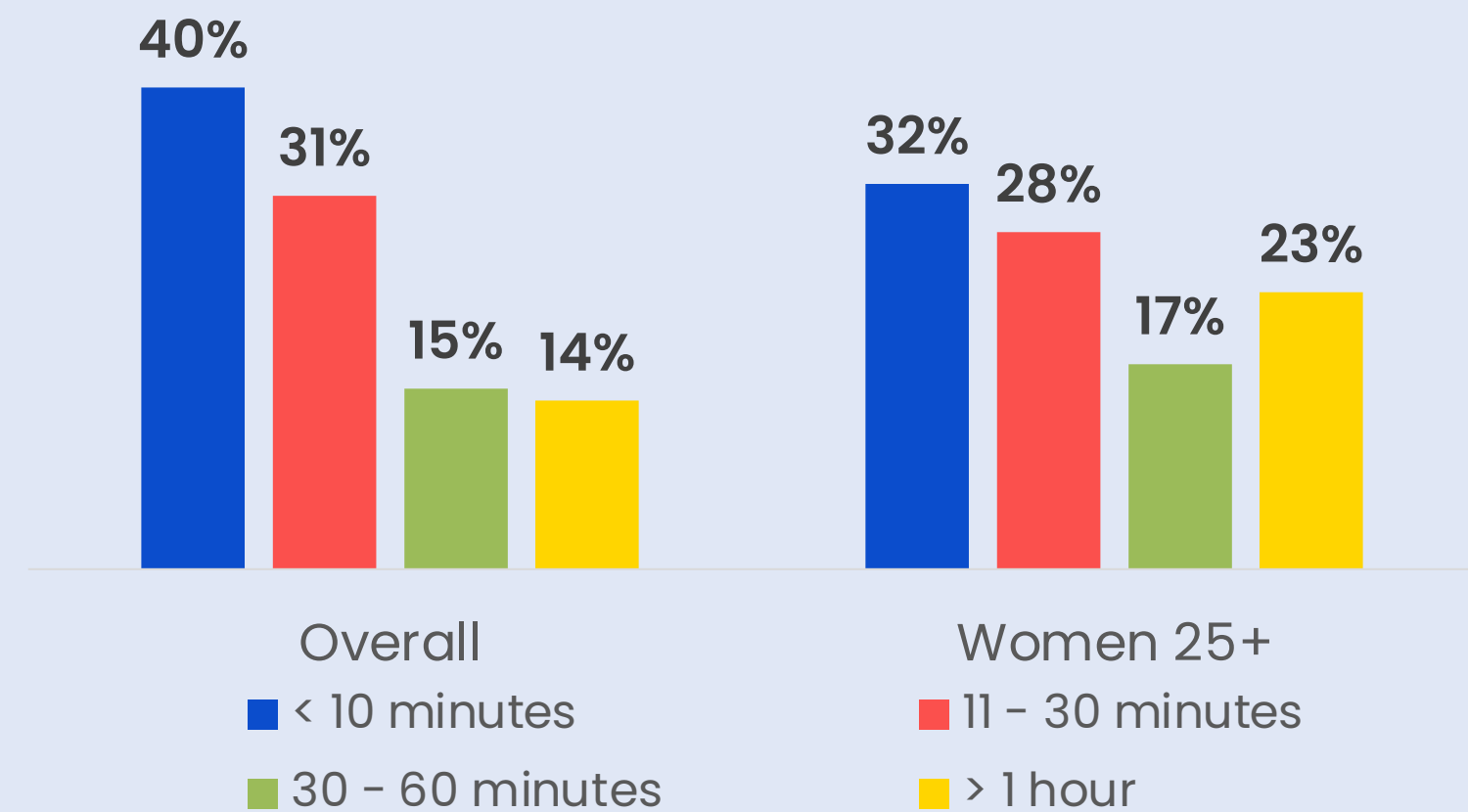
While most women gamers snack and play in 10-minute increments, a substantial share play for much longer – over an hour

Why do Indian women gamers play?



- Entertainment/Relaxation
- Connect with family/friends
- To compete and win

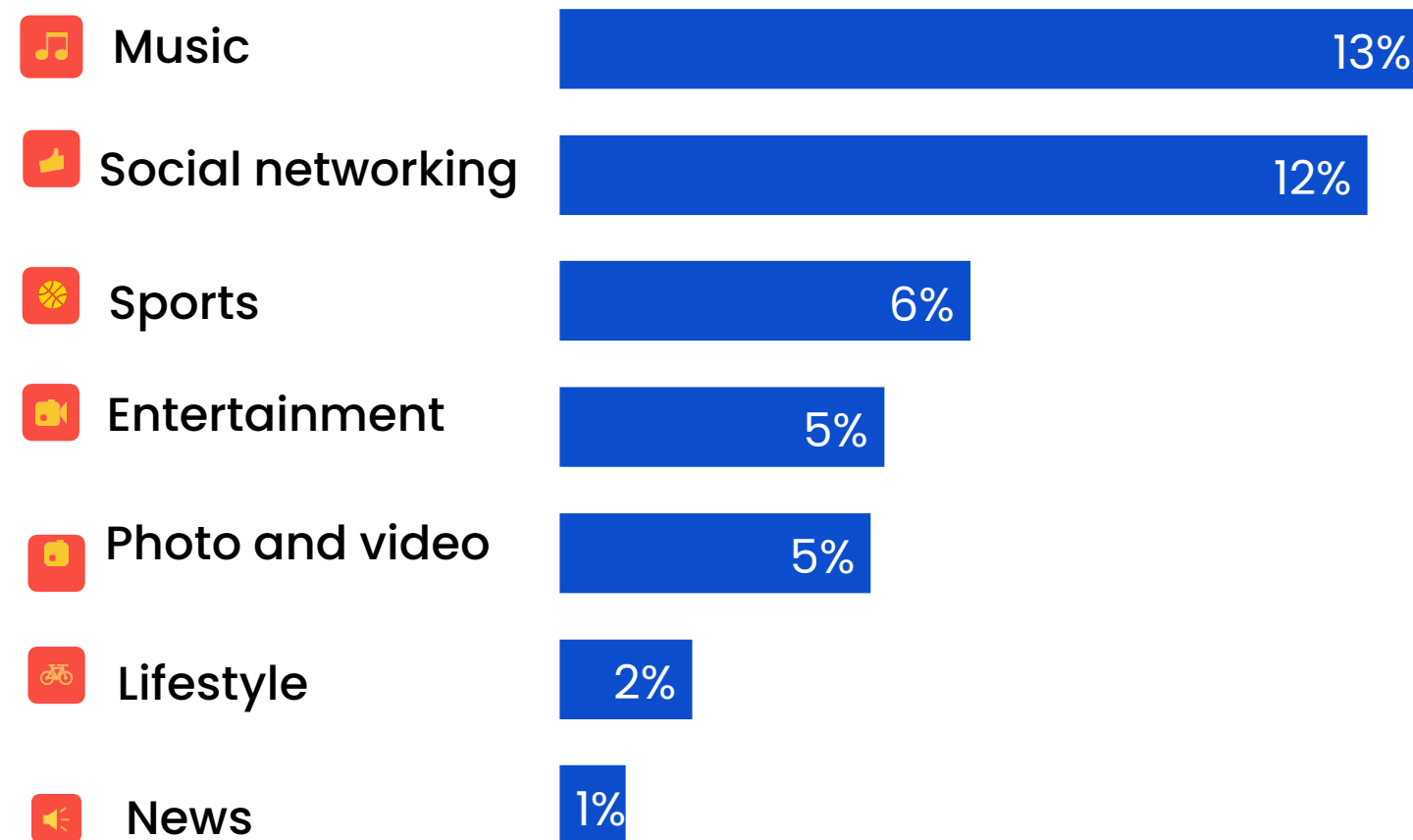
Time spent per session gaming



BUSTING MYTH #2 ONE GAMER, MANY AVATARS

Gamers have a wide variety of interests both online and offline. Be it social networking apps or visiting retail store visitors, it is likely that the audiences you are after are gamers too!

In pursuit of the other: Other Apps that Gamers use



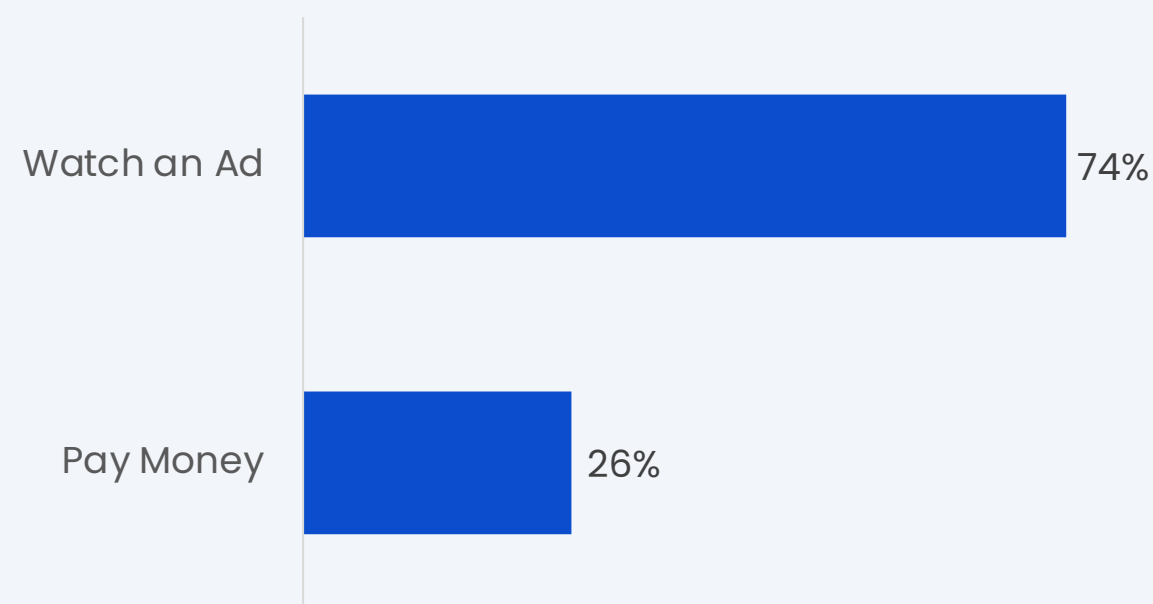
In pursuit of the other: Offline characteristics



BUSTING MYTH #3 A WATCHFUL AUDIENCE

Gamers are familiar with gaming ads and clearly prefer to watch them over and above paying money when looking to progress in a game or in exchange for a benefit. Ad recall is also very high amongst Indian Gamers, especially when it is engaging and about a topic of interest.

Preferred method to progress in a game



Ad Recall when playing Mobile Games



Top Reasons for Ad Recall

When the ad is about a brand/product or topic of interest

When the ad helps them benefit in the game

When the ad is engaging and interactive

Source: InMobi Pulse Gaming Survey India, February 2021
 Q16. How do you usually prefer to progress to the next level in a game? For e.g. when you find yourself stuck on a level.
 Q17. Can you recall the ads that you see while gaming?

BUSTING MYTH #4 NO IMPOSTERS AMONGST US

Gamers are familiar with gaming ads and clearly prefer to watch them over and above paying money when looking to progress in a game or in exchange for a benefit. Ad recall is also very high amongst Indian Gamers, especially when it is engaging and about a topic of interest.

Who's Spending on Gaming apps



Shopping



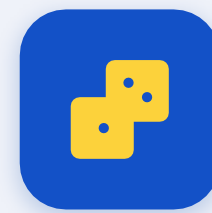
Social Media



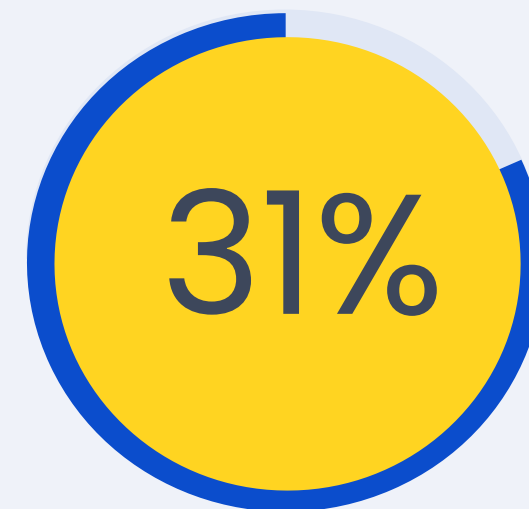
Entertainment



Chat &
Communications



Games



higher **video completion rate** seen on gaming than the MOAT benchmark for in-app video ads.

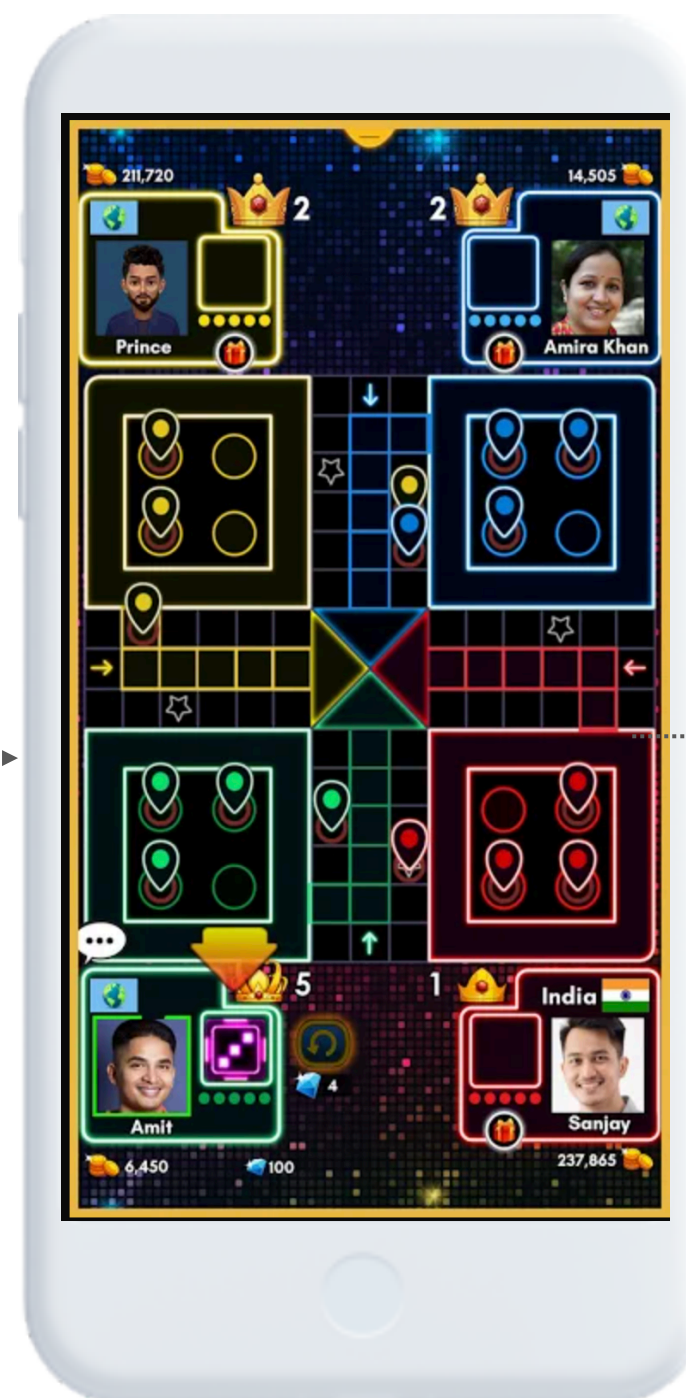


times higher **video ad engagement** seen on gaming apps than on non-gaming apps

READY, SET, GAME ON! (VERTICAL VIDEO)



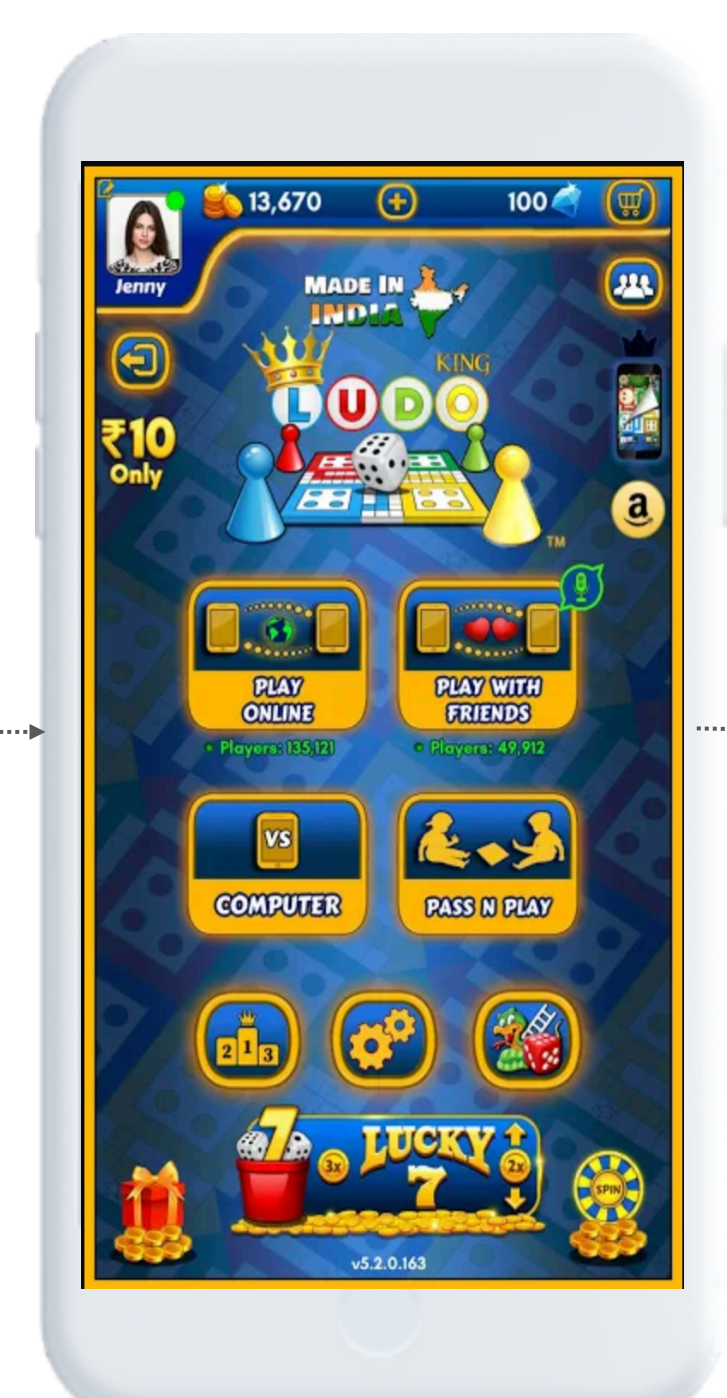
Mobile Gamer Engaged in Gameplay



Natural Break in Gameplay



Non-intrusive and Immersive Ad Experience

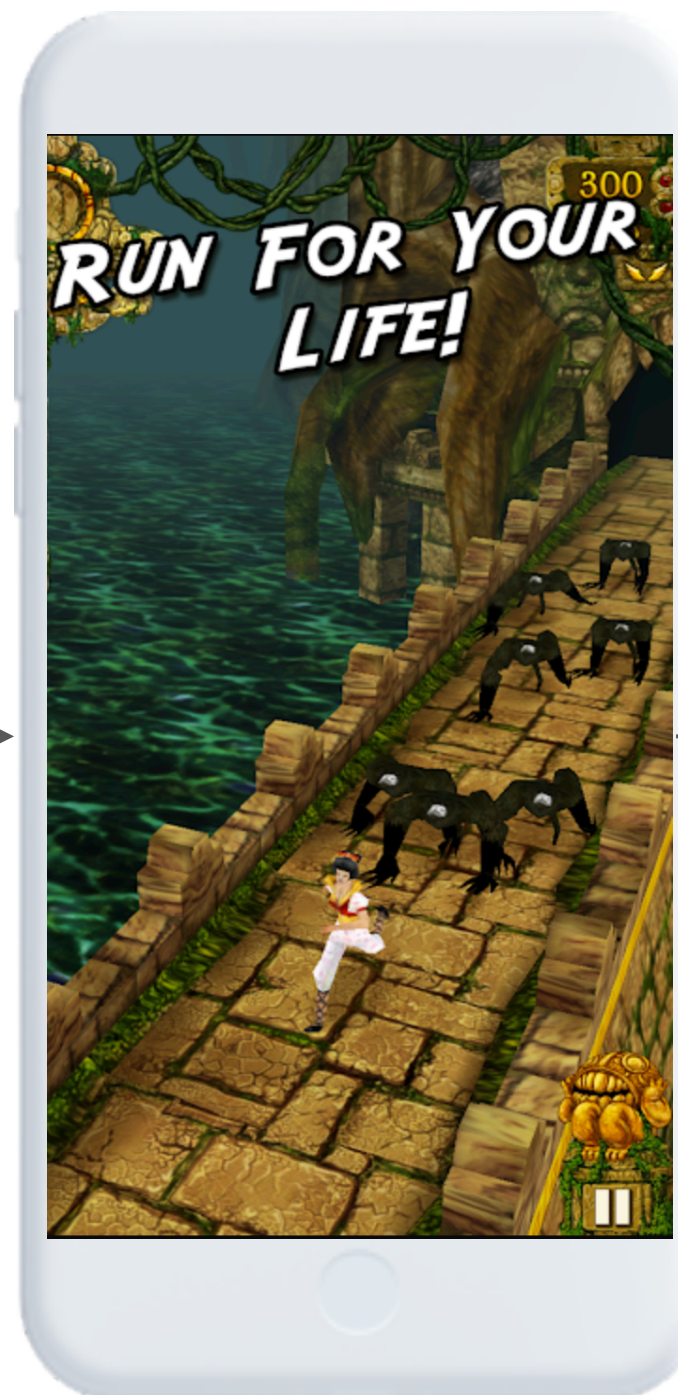


Gameplay Resumes Immediately after Ad Experience

READY, SET, GAME ON! (REWARDED VERTICAL VIDEO)



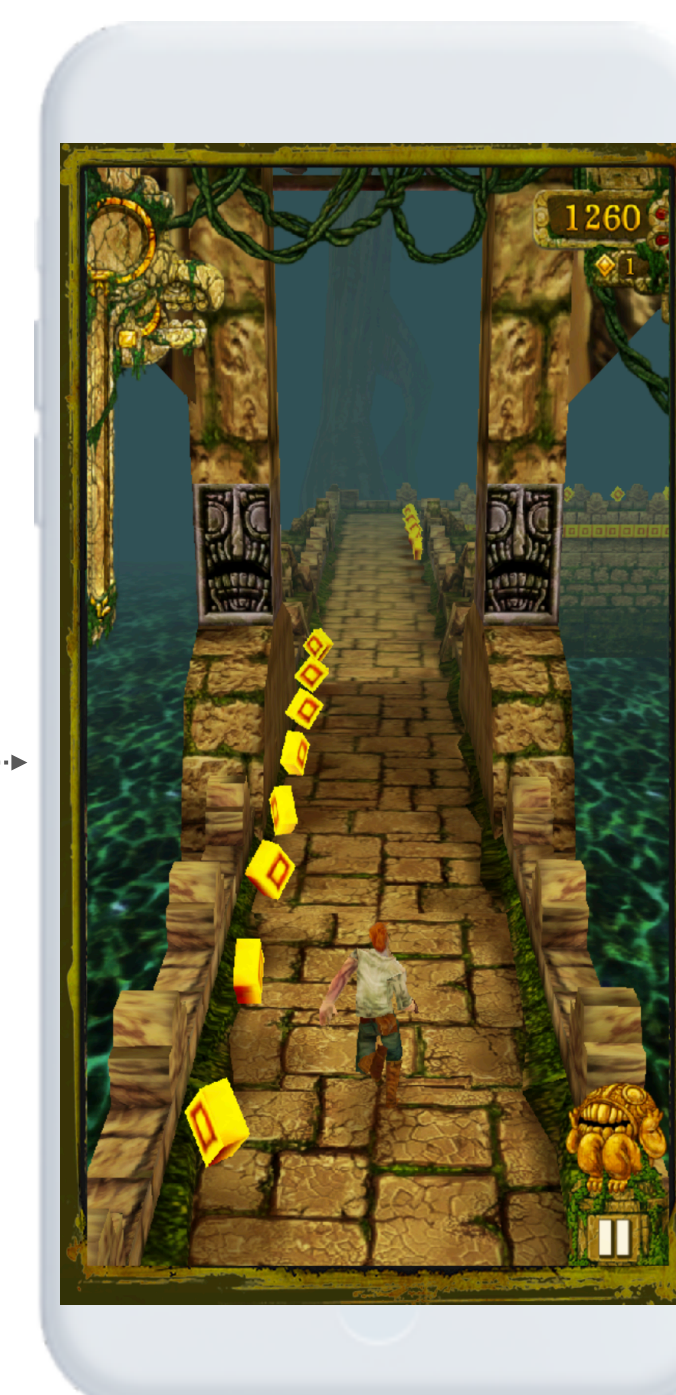
Mobile Gamer Engaged in Gameplay



Natural Break in Gameplay

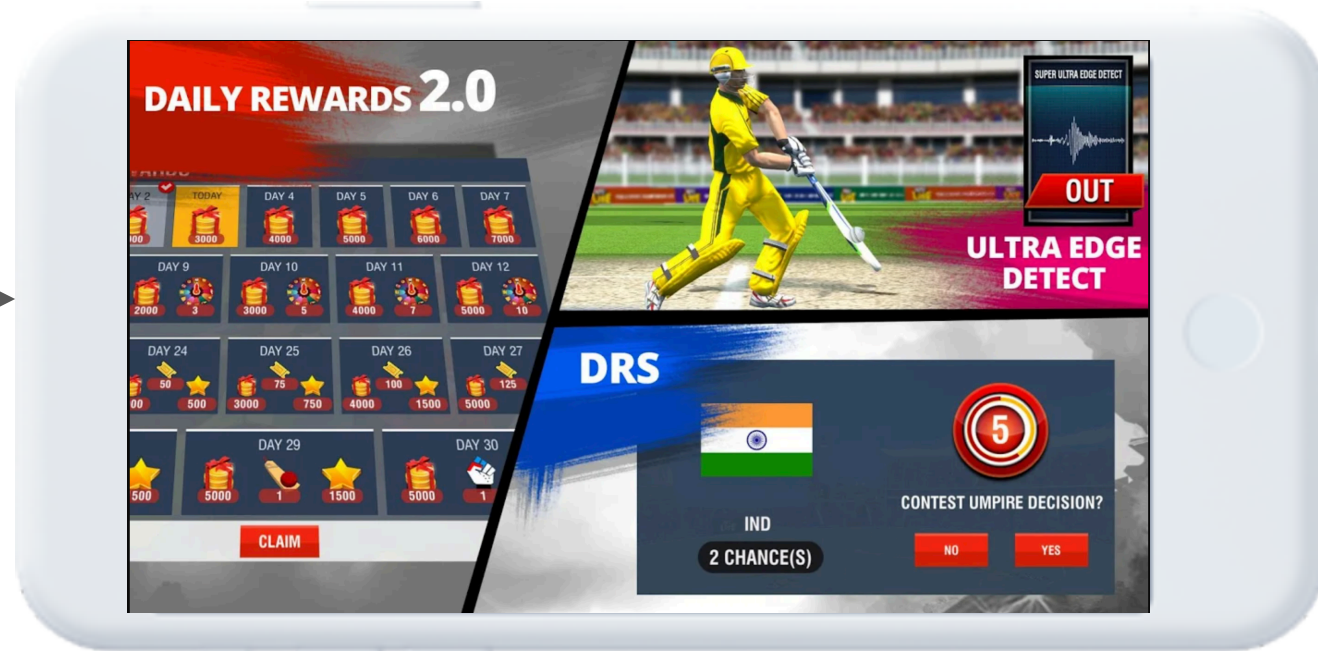


Non-intrusive and Immersive Rewarded Ad Experiences



Gameplay Resumes Immediately after Rewarded Ad Experience

READY, SET, GAME ON! (LANDSCAPE VIDEO)



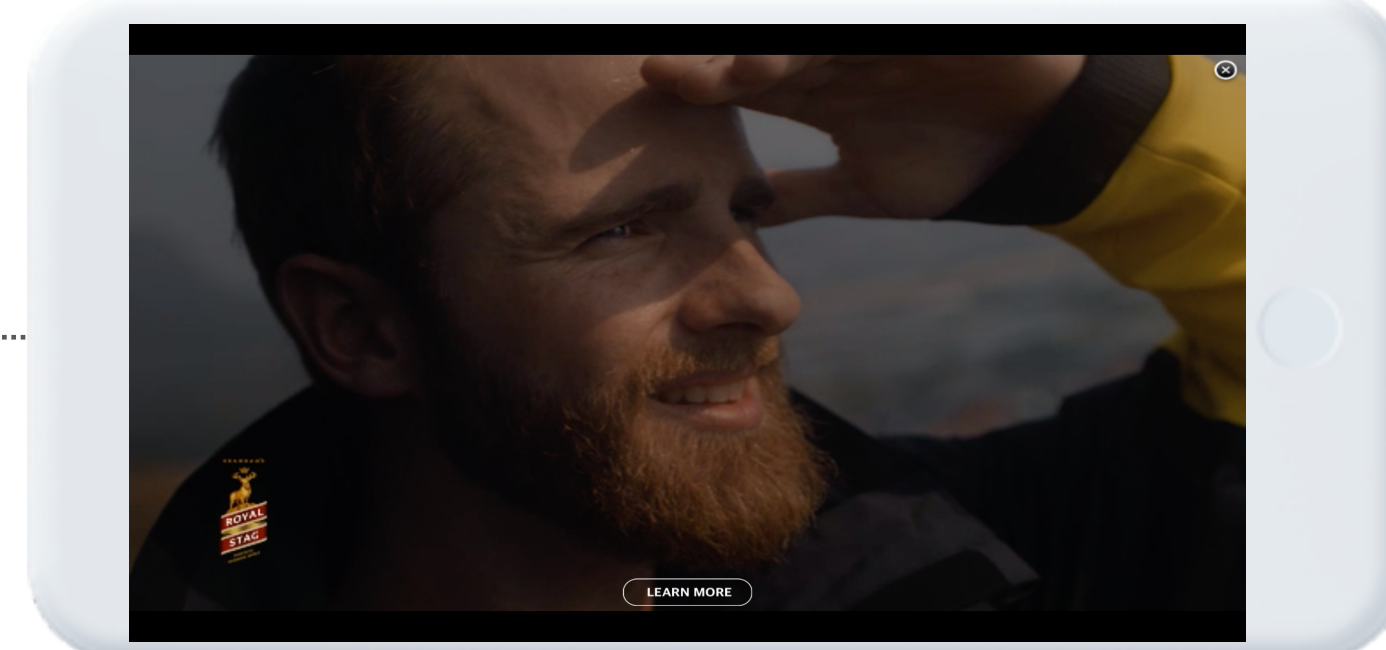
Mobile Gamer Engaged in Gameplay



Natural Break in Gameplay



Gameplay Resumes Immediately after Ad Experience



Non-intrusive and Immersive Ad Experience

InMobi drives real connections between brands and consumers by leveraging its technology platforms and exclusive access to mobile intelligence. Its Marketing Cloud creates new paths for brands to understand, identify, engage and acquire connected consumers.

Powered by

- Mobile Intelligence
- Transparent
- Always On
- Integrated

Marketing Cloud



**Understand
& Identify**



**Engage &
Acquire**

Interested in learning more? Write to us at mobilemarketing@inmobi.com