

MILLENNIALS GAMING HABITS

01. 08. 2018



VOICES OF

INDIA'S GAMING YOUTH

India's Youth & Gaming Tastes

Over 50% of gamers in our country are under 24 years of age and a vast majority of them are under 36 years, the so called Millennials age group. With gaming become pervasive in India over the past 2 years, JetSynthesys undertook a study of over 1100 millennials across metros and Tier 1 cities to understand gaming preferences across mobile, console, PC and other new forms of gaming like Virtual Reality and Augmented Reality.

The study, inclusive of interviews with ardent gamers and even players who played professional gaming tournaments, throws light on vastly different behaviours compared to two years ago. On one front is the shift to multiplayer based gaming on mobile and live PVP while another is adoption of gaming video and watching gaming streams as new means for players to identify with those who relate to their personality.

Not only has India's young gamers begun to engage themselves more with games they play, be it on mobile or PC, they are also beginning to spend, with almost 3 out of 10 gamers having spent in games and almost 70% of those in the past 6 months.

A bright future beckons for India's gamers and gaming community as we get ready to welcome the 2020's era where gamification and games in various forms will become part of our country's millennial psyche and daily lives.

310Mn Indian Gamers By 2021

Gaming apps are the most popular apps on Smartphones, as about 23 percent of the all apps on AppStores fit in this category. Even in terms of engagement, gaming consumes about 30 hours of time spent on apps each month, making it 3x to 5x higher in comparison to time spent in categories like Travel (60 Minutes) & Shopping (90 Minutes) which are more need based.

By 2021, India is expected to have 310Mn gamers in India out of 735Mn internet users, which indicates that approximately 1 out of 2 users would have played a mobile game.

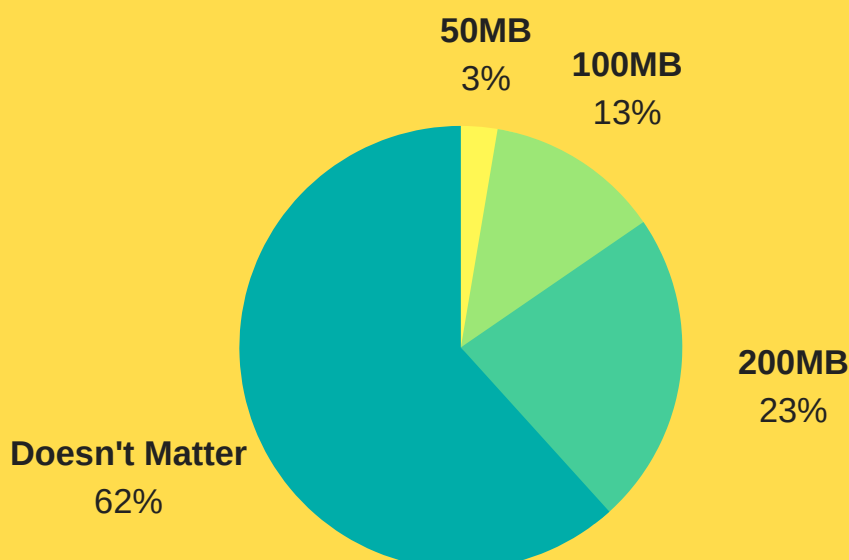
Games represented over 80% of total worldwide consumer spend for combined iOS App Store and Google Play last year, while accounting for roughly 35% of total worldwide downloads showcasing power of engagement is key to monetize players.

Globally mobile games are expected to grow from \$50 billion in 2016 to \$105 billion in 2021 and has surpassed PC & Console gaming by a big margin over the past few years. Interest has also begun to rise in real money gaming, augmented reality and virtual reality as millennials sample various game forms for their entertainment needs.

Data conscious for Downloading games? No More!

One of the most interesting facets of the millennial study has been that size doesn't matter as much today for downloading mobile games . With data prices falling from \$4.4 per GB of data to \$0.17 per GB, a drop of over 90% over the past few years, this shouldn't come as a surprise, but it has deep effects in terms of quality of games, that players want to consume now compared to two years ago.

Over 61% of the millennials mentioned that game size doesn't matter, while over 22% are open to downloading a 200MB plus game! This is in stark contrast to the past, when game developers were building games which are sub 50MB to cater to the young and data conscious audience in the country.



App Stores : Trusted for game Discovery

Despite the influences of friends, AppStore & PlayStore recommendations plays a key role in Game Discovery. Over 61% millennial respondents mentioned this a leading form of game discovery.

The most exciting new trend is that around 13% of survey respondents mentioned YouTube as a form of game discovery showing that millenials are open to consuming curated content where influencer opinions and video counts.

Passive players who are new to gaming and generally play puzzle games and are more influenced by ratings and top charts in app stores than mature gamers.

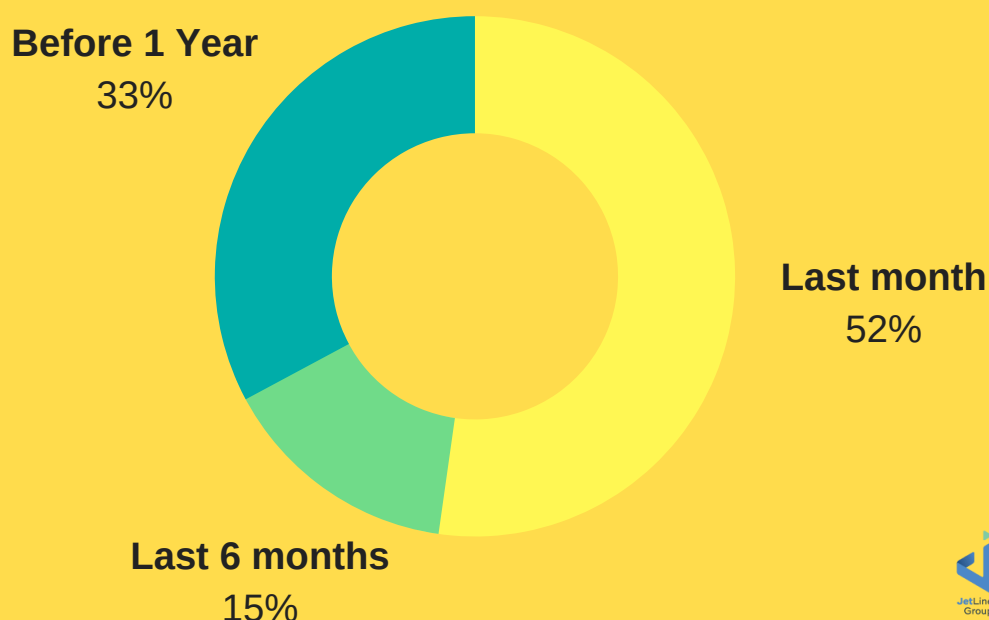
Given that HowTo video searches have grown by over 3x in the last year on YouTube in India, videos informing new game updates and tutorials for pro-gamers as well as physical e-Sports tournaments have become a millennial favourite. Social media and video content on Instagram, YouTube and Facebook will become a significant acquisition channel for new games in the years to come.

Advertisement also serves as means of discovery especially for newly launched titles in the market. Around 9% of millennials also referred to downloading new games due to advertisments on social media or other gaming apps.

Aware of what they want to Download

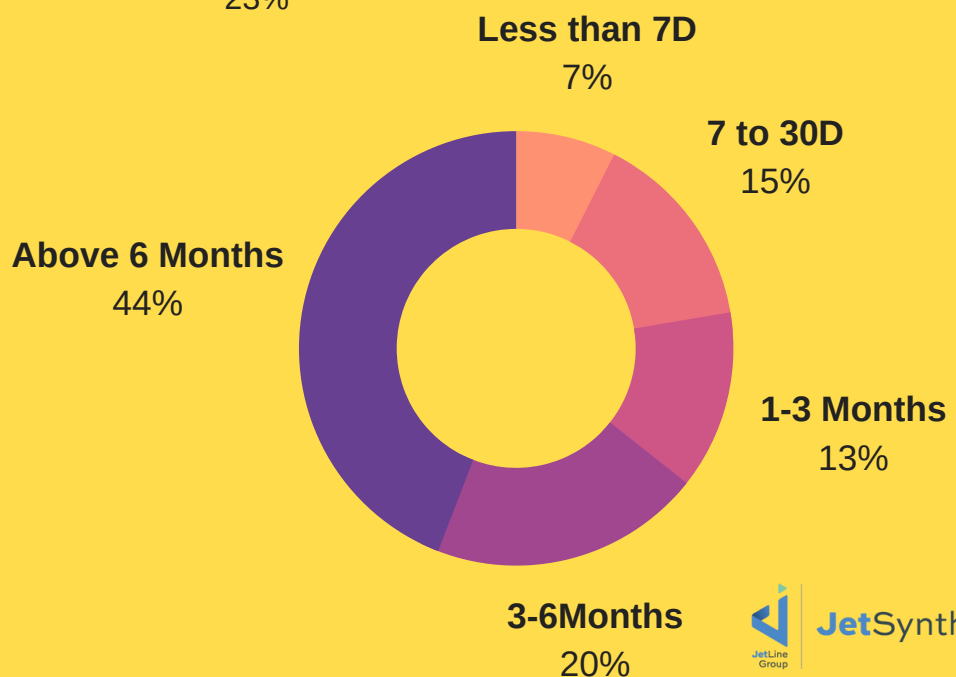
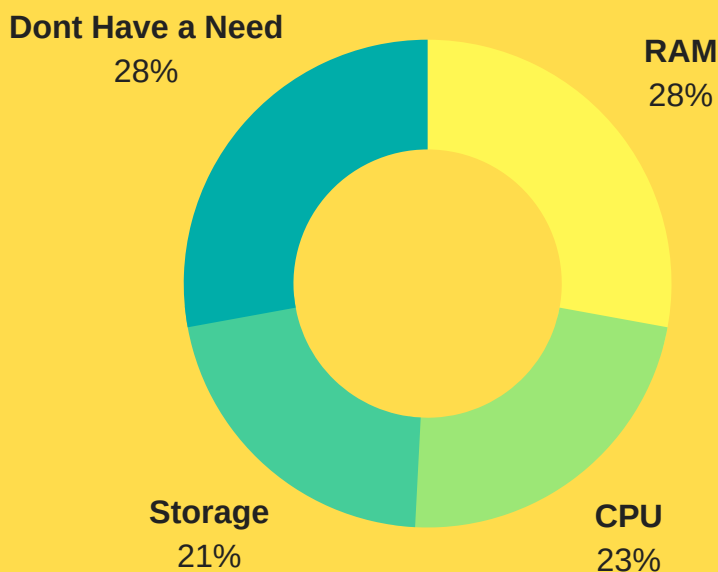
Indian gamers are known to be extremely data sensitive given lower storage memory to store games on their phones leading to high churn rate among gaming apps. However, the study also revealed that over 57% of players ideally want to keep a game for over 3 months on their phones after downloading it and for 44% of the players, the intent was to keep a new game on the phone for over 6 months showing millennials make a conscious choice in deciding which content to engage with.

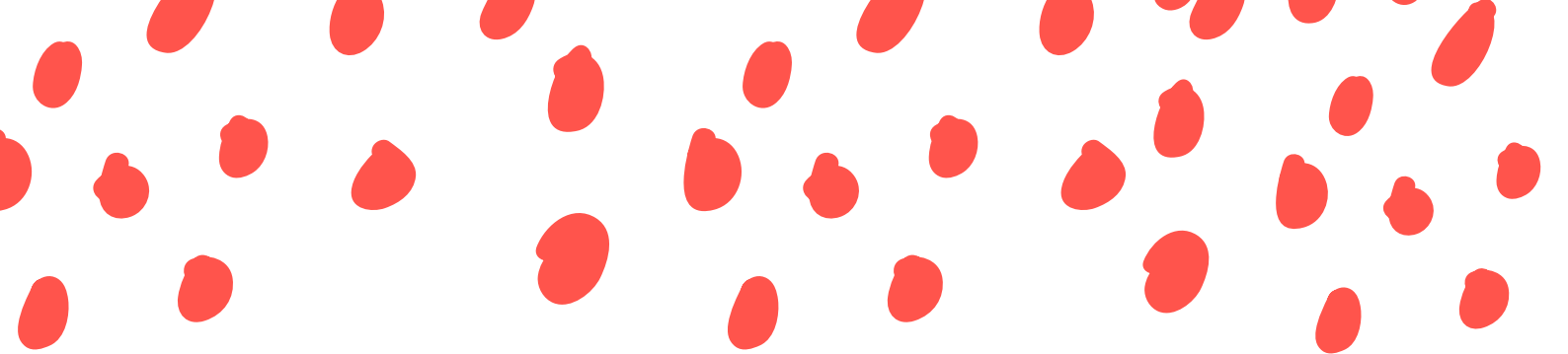
The awareness of nature of gaming content and engagement also reflects in monetization with almost 52% of those who made purchases on games claim to have made their spent in the last month showing that most of them are recent converts or repeat spenders in gaming.



RAM preferred for Gaming Smartphones

Over 50% of the millennials also stated that they plan to upgrade their phones for gaming needs in the next 6 months especially to upgrade their RAM to over 3GB to have an improved gaming experience. Only 22% of the millennials mentioned that their intent was to download and keep a new game for less than 30 days indicating that quality content can win the churn battle!





HOOKED TO MULTIPLAYER



TOURNAMENTS
HEAD TO HEAD

Live PVP Expands its Presence

In mobile gaming, Live PvP (Player vs Player) expanded its presence in top 5 grossing games on both iOS and Google Play. This expansion of this space has given rise to esports-related games and tournament streaming and viewing globally.

One of the recent global hits Fortnite which grossed more than 1 Billion dollars across console and mobile with a Battle Royale Live PVP gameplay in just under 10 months, had the longest viewing time in May 2018 on Twitch, with 143.87 million hours viewed on an average of 10,276 channels. Battle Royale has also become the most popular genre for streaming with viewer's watching 700 million hours of Battle Royale gaming in May, compared to 275 million hours of MOBA (Multiplayer Online Battle Arenas).

Globally these mobile gamers who engage with Live PVP were nearly 2x more likely to have spent money on a mobile game in than the non-PvP or co-op gamer sample.

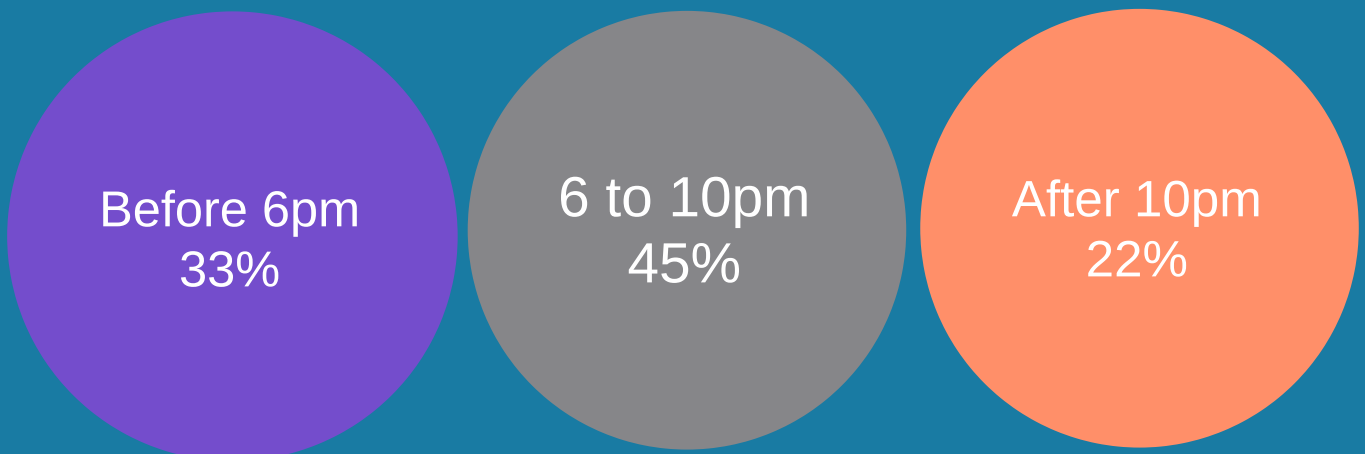
India too is not lagging behind with Live PVP games such as Fortnite and Player Unknown Battlegrounds making inroads and growing user bases in the last 3 months amongst core & mid core gamers.

PVP Gameplay sizzles at Night!

In terms of social gameplay, over 83% of survey respondents mentioned that they had played Elimination Tournaments or Head to Head PVP (Player vs Player) matches. Friends PVP or Local multiplayer matches had less takers amongst millennial gamers.

In addition many gamers attributed to social game play being so addictive because they can connect with other players within the mobile game in order to obtain more items like costumes, weapons or the similar and progress further along with in-game friends.

Most players also mentioned that their favourite time to play is between 6-10pm (65%) or post 10pm (22%) when they get free from daily chores.



10
50



SALE!
PURCHASES



OFF
ER

Ample new avenues to Spend money

Over the past 24 months, gaming in India has found multiple avenues for monetization from Real money games to Fantasy Sports gaming and traditional Mobile gaming.

Although casual, puzzle, sports, strategy and racing remains some of the most popular genres among millennial generation with over 90% in the study having experienced games in these genres, over 56% also mentioned that fantasy sports is something they have tried their hands at and 16% claimed to have tried real money gaming.

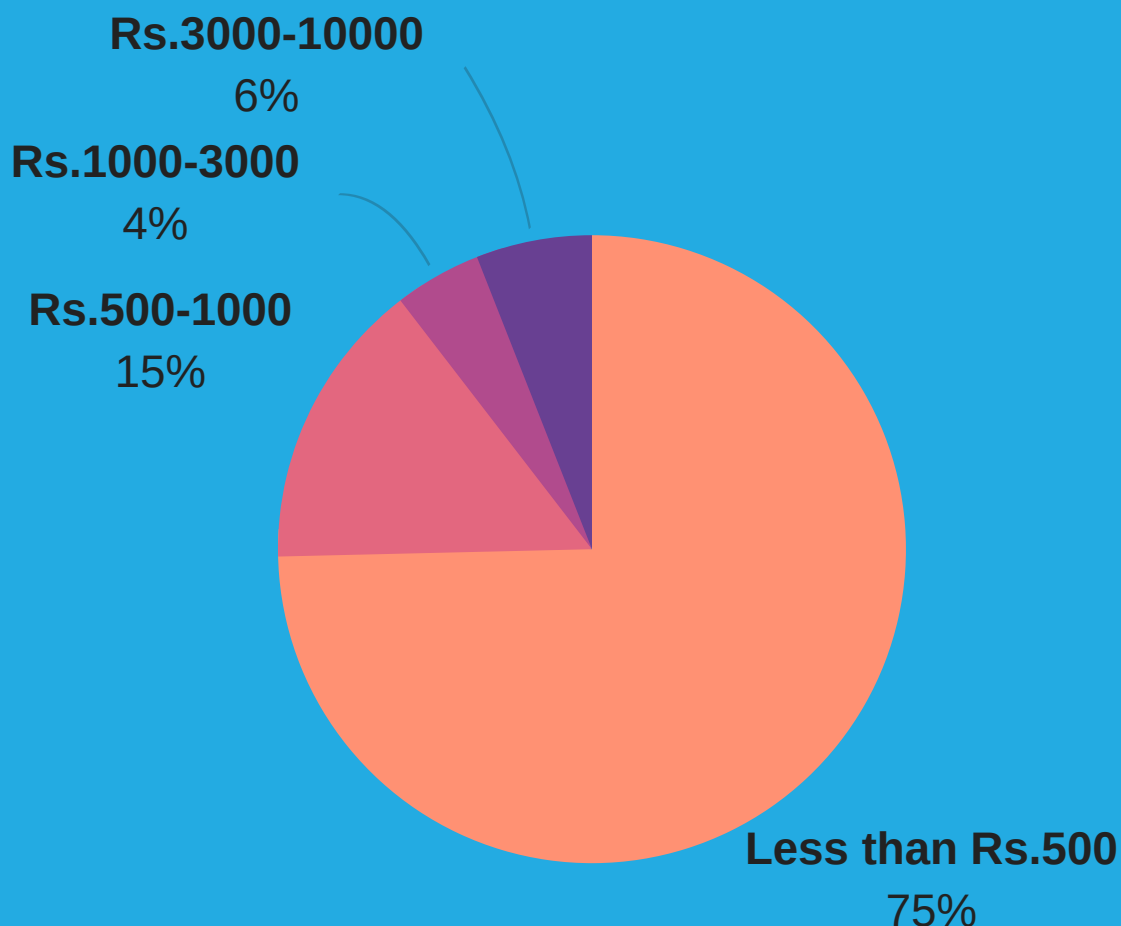
In addition more than 35% of the millennial gamers in the survey have paid subscriptions to one of these OTT platforms including Netflix (13%), Amazon Prime (20%) and HotStar (26%) indicating that they are willing to spend on an ongoing basis for quality entertainment.

33% also claimed to have spent money in Fantasy Sports, which was a revelation showcasing that despite a small base of about 20 million users in India, Fantasy Sports gaming has high conversion potential among Indian gamers and strong headroom for growth in the years to come.

3 out of 10 Millennials have spent on games

Scale of monetization growth in India over the past one year was also seen in the millennial study when almost 3 of 10 (28%) of the study respondents claimed to have spent in mobile games in their lifetime and with a vast majority spending in the last one year (over 67%).

The most preferred transaction price points were less than Rs.500 (75%), and a small segment (6%) was spending close to Rs.10,000 on games.



Player Comments

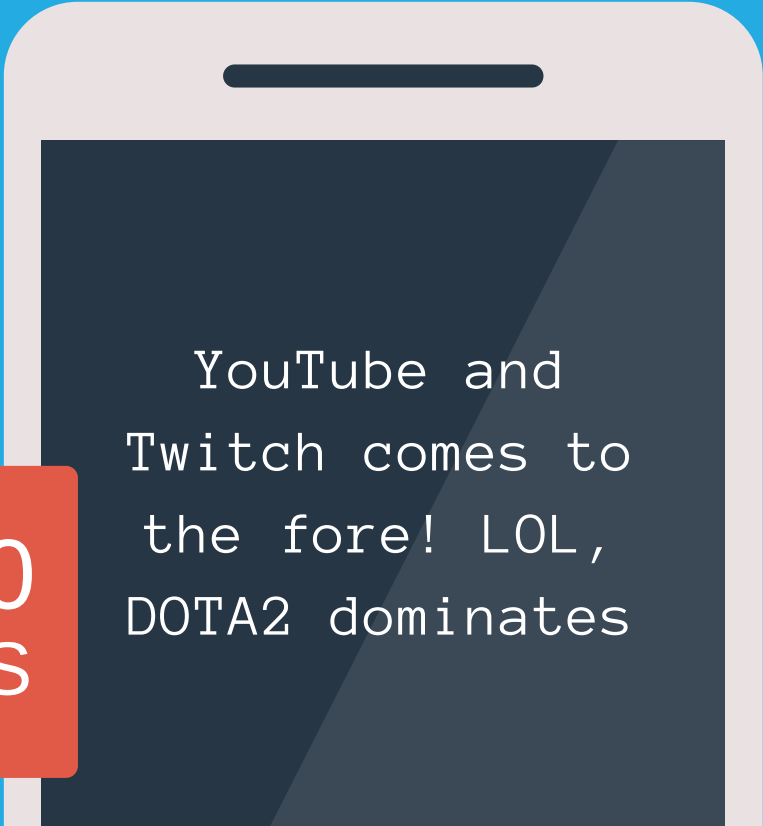
"Fantasy Sports lets me showcase my knowledge & still earn money at the same time"

"Battle Royale is fun but needs a good online connection. I am planning to upgrade my phone and data pack to play more PVP games"

"I made many purchases sometimes 6 to 7 in a single day. But I dont regret spending 1000 Rs. if its worth it."

The Streaming Superstar

Aspirational youth influenced by games and Streamers

A white smartphone is shown vertically. The screen is black with white text. The text reads: "YouTube and Twitch comes to the fore! LOL, DOTA2 dominates".

YouTube and
Twitch comes to
the fore! LOL,
DOTA2 dominates

A grey hand with the thumb pointing up, representing a 'like' or 'thumbs up' gesture.

1500
LIKES

Tuning Up on Twitch for Game Streaming

Gaming especially on mobile may seem to be a solitary activity, but social behavior in games can take many forms, from competing with others to building communities and alliances and watching streamers who entertain gamers with action packed sequences and commentary – hallmarks of the best eSports video content for most ardent fans.

Asia, being the largest gaming market overall, is also estimated to generate the lion's share of the eSports revenue at \$406Mn of the total global eSports revenue of over a billion dollars.

Most esports fans use both Twitch and YouTube to consume gaming content. YouTube is used for more curated content and Twitch for live streams. Intel Extreme Masters Katowice held in Poland, was the one of most watched eSports event, with a recorded 46 million unique viewers. The event included competitions in Counter Strike, League of Legends and Starcraft.

In United States, Twitch remains the most popular destination for esports fans; 87% of US esports viewers tune into their live streams while 77% watch esports content on YouTube. League of Legends one of the top eSports games was a leader with a player base of over 100 million globally.

Passion for Video Commentary Grows!

Although 85% of gamers in the millennial study watched gaming videos on YouTube or Twitch, more interesting is the fact that more than 37% of gamers admitted to creating gaming videos themselves on these platforms.

The love for streaming gaming content has created global streaming icons like Summit1g (who streams for 35 hours a week) or the Syndicate with over a million followers on Twitch.

Influenced by these celebrities of the streaming world, 45% of the millennials also mentioned that they have considered a professional career as a game commentator or streamer owing to the overwhelming fame, money and attention that the profession can generate if you get it right!

Streamers are also mostly multi-platform players experiencing games in different forms. After mobile games millennial streamers ranked these platforms in order of play preference starting with PC (46%), Console (23%), VR (16%) & AR (15%).



FANTASY SPORTS

THE
NEXT
BIG
THING

Fantasy Sports becomes Mainstream

Fantasy sports has become more popular in India with the rise of daily fantasy contests especially in urban India. In developed markets, groups of friends and coworkers have long played season-long fantasy contests together.

In the U.S., fantasy sports (and especially daily fantasy sports) provide a rare legal way for fans to wager money on the results of competitions resulting in over 50 million players participating in this form of gaming.

Unlike traditional mobile games daily fantasy sports is usually played alone or with strangers and most fantasy sports platforms, charge entry fees to enter these daily contests ranging from Rs.10 to over Rs.5000 in certain cases. Our survey revealed that most fantasy sports players display high stickiness playing over 5 days a week, and some even play 4+ contests simultaneously.

As per the Fantasy Sports trade association in US, Fantasy sports players are much younger, better educated, with higher household incomes and more likely to have full-time employment: 71% Male & 29% Female. Most of them have college degrees and have household incomes over \$75,000.

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REPORT BY
JETSYNTHESYS PVT. LTD