e4m | groupm ESP

INDIA
ONLINE
GAMING
REPORT

INTRODUCTION

Gaming used to necessitate a lot of technology, with consoles, PCs, and a lack of digital awareness, so it's no surprise that playing on a screen was considered as a leisure activity or a pastime for a long time. However, with the increasing penetration of smartphones, low-cost data plans, and a shift of the consumer mindset, India has emerged as one of the biggest markets for online gaming.

According to a report, the Indian domestic market for online gaming is estimated to grow to more than **1500 Cr INR** in 2023 representing a CAGR of nearly 22 percent. It goes on to say that 85% of online gamers in India are expected to be mobile gamers in 2022.

Even the tier-III cities have joined the gaming bandwagon contributing to this rise. Some reports suggest that small towns have reported more than 100 percent and up to 200 percent growth.

Above data is calculated according to the following conversion size, 1 USD= 75 INR

PLAY

THE PANDEMIC EFFECT

Mobile gaming had already been on the rise before the pandemic hit. However, Covid 19 brought along a new wave of mobile usage with a significant surge in gaming as well. It is reported that around **45%** of Indians started playing mobile games due to the pandemic. People were engaging in games, not just for relaxation, but to connect with family and friends as well.

Further, the pandemic took gaming beyond leisure, and towards brand consciousness. As brands tried to find new ways to grab their customer's attention, gaming emerged as a new mass medium channel.

But, what are the next steps towards tapping into this opportunity? What are the challenges of the industry? How are influencers driving this growth?

This report by **GroupM ESP** and **e4m** seeks to focus on the current landscape of online gaming in India and how brands can leverage this billion-dollar industry for marketing and brand recognition.

RISING THROUGH THE RANKS

MOBILE GAMERS IN A PRE-AND POST - LOCKDOWN WORLD

January 2020

January 2021
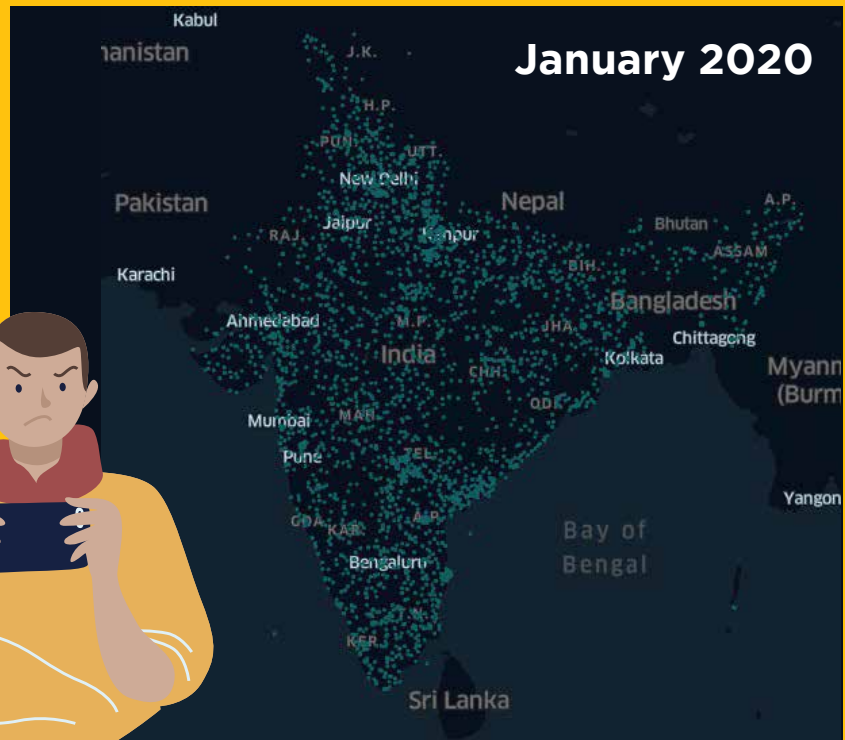
LANDSCAPE OF ONLINE GAMING IN INDIA

Home to **40 Cr users**, India has undoubtedly become a lucrative market for advertisers and brands today. From crypto to FMCG, most industries are leveraging this opportunity. Some of the giants of the online gaming sector include **Nazara, Nodwin, Jetsynthesys, Octro** and more.

But what are the ideal steps to ensure an effective marketing strategy? As they say, knowing your audience is the first step to marketing, let's understand the modern mobile gamer.

WHO PLAYS
WHAT AND WHERE

CASUAL GAMES	MIDCORE AND HARDCORE GAMES	REAL MONEY GAMES
Low skills required	Games are intense and complex, but skills can be developed over time	These are usually games such as poker, teenpatti which require skills
Easy to use interface	VFX and CGI heavy	Designed in a way to provide real life experiences
These games are ad dependent for revenue, no to less in-app purchases	Main source of revenue is usually in-app purchases, brand integrations, subscriptions, merch etc.	Players are required to buy coins/tokens using their own money in order to play
Types of Ads- crypto, FMCG, footwear, apparel etc.	Example- Tesla and Spiderman No Way Home integrated with BGMI.	Ads are rare but focused on customers paying more to enhance their experience
Ludo King, Chess, Candy Crush, Puzzle games, etc	Call of Duty, BGMI, etc	Ultimate Teen Patti, Rummy Circle, A23, etc

CASUAL GAMES

These games are usually free to download and are played for entertainment purposes. Who is a casual gamer? Nearly everyone. These games require a very low level of concentration and one can even multitask while playing. Nowadays, users can even find instant games, pre-installed and free. They are usually short and easy.

Monetized heavily by local ads, this segment leads the number of downloads, and rightly so. Gamers are usually playing to relax and don't seem to mind watching an ad or two. Some of these ads also give rewards like extra coins or upgrading the levels, which further motivates the user to watch the ad instead of skipping. A classic example of this category is Ludo King. Developed by Gametion technologies, the USP of the game seems to be nostalgia.

MIDCORE GAMES

As the name suggests, these games lie somewhere on the spectrum between casual and hardcore games. It simply means they are easy to play and learn but yet hard to master. Mainly consisting of RPGs (role-play games) and MOBAs (multiplayer online battle arenas), mid-core games have a huge potential for brands and advertisers. As these games are not too intense, users are likely to stay and the retention rate is high.

The target audience is usually between 20-40 years and the revenue channels are a mix of both in-app purchases and ads. Some of the examples are MARVEL strike force, Clash of Clans, etc.

HARDCORE GAMES

The gamers of the industry, most of us know at least one gamer who takes a mission seriously, enters contests, and is too serious about his armors and badges. Hardcore games are complex and require a lot of attention and time. As these are generally played by serious users, the IAP (in-app purchases) rate is really high. These games focus more on live users than the number of downloads.

Hardcore games use heavy computer graphics and VFX. One of the most popular sub-genre is action/battle-royale games such as **Call of Duty, BGMI**, etc. **PUBG** was one of the top games in this category before it got banned in the country.

REAL MONEY GAMES

Needless to say, this category has benefited a lot from mobile gaming. Some of the major players are **Dream11, Paytm First Games, Rummy Culture**, etc. The users aim to play and win real cash, hence usually the category involves real-life like games. Card games such as **Teenpatti, Poker**, etc gained a lot of momentum during 2020 to 2021.

Of course, the revenue model revolves around the cash deposited by the users but rarely, ads also contribute towards this. With fantasy being one of the major sub-genres, sponsorship is more than common for this segment.
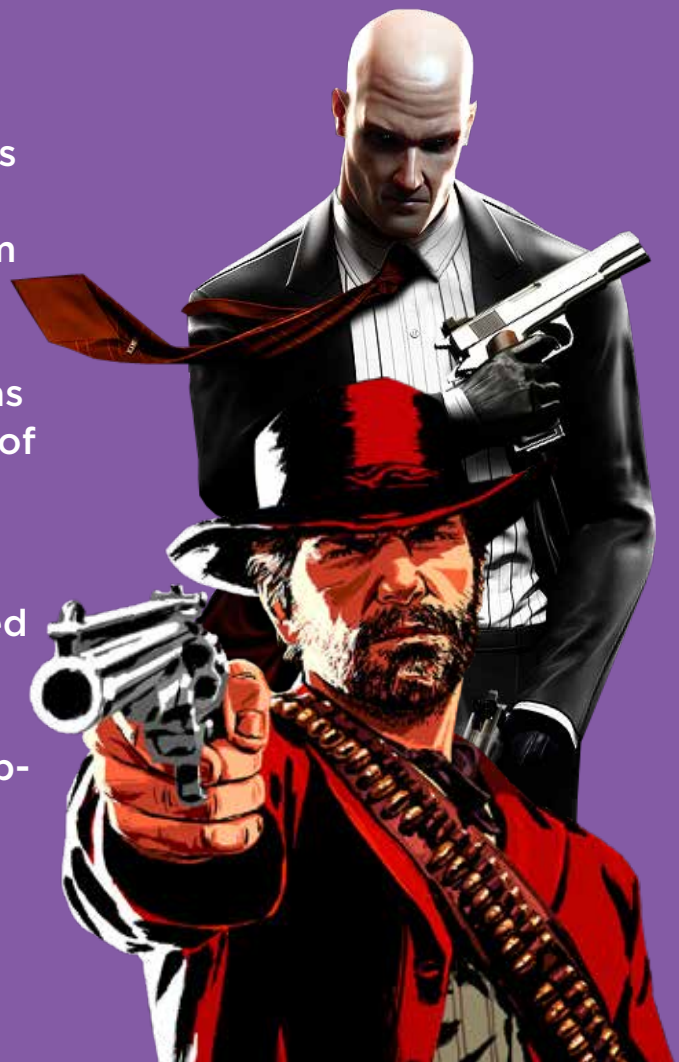
BIG OPPORTUNITIES, BIGGER **SPENDS**

Naturally, India's mobile-first gaming approach has attracted a lot of attention over the years. Some of the key advertisers of the segment are **Dream11, Mobile Premier League, Play games 24*7** (RummyCircle), **Gameskraft** (RummyCulture), **BGMI**, etc.

Digital channels are primarily driving the advertising in e-gaming industry. This involves ad campaigns to attract new users, more downloads.

Midcore and Hardcore games use a mix of both digital, and offline channels to reach their audience. The business strategy not only focuses on acquisition but retention as well.

When it comes to real money gaming or game of chance, companies use offline media & sponsorships heavily to promote usage.

According to a report by Statista, the market size is estimated to touch 6000 Cr INR by 2025.

Above data is calculated according to the following conversion size, 1 USD= 75 INR

UNDERSTAND YOUR **CUSTOMER**

As gaming attracts more attention, it is safe to say that well-defined KPIs and marketing strategies can do wonders for businesses. Therefore, it is important to understand your target audience and make a connection with the users.

For instance, casual and real money games have a broader range of target audiences as they rely on downloads and acquisition, while core games are more focused on retention and building long-lasting relationships.

Performance marketing can be a useful tool if done right. The ROI-based strategies can be aptly used for gaming as it is a repetitive and engaging activity, for all of the segments. Whether brands use this as a mode of advertising, building an engaged community, or simply for brand awareness, ultimately this is an opportunity that cannot be ignored for long. No matter the nature of your business, gaming has something to offer for every niche and industry, given that you use it right.

DECODING THE MONETISATION: FOR THE GAMER

PAYING FOR DOWNLOADING THE GAME

Users pay an upfront fee directly to be able to download the game, commonly called as "paid" games on playstore/appstore

FREEMIUMS

Users are allowed to use the basic features, but pay a fee to upgrade the characters, levels, etc. In simple terms, they pay to use advanced versions of the game.

IAP (IN-APP PURCHASES)

Other than extra lives and characters, IAPs also include buying virtual currency at an extra cost. For example: Candy Crush allows gamers to use all features at no cost but they are required to pay for extra lives.

SUBSCRIPTIONS

Users pay a monthly or annual fee to use the upgraded features in a game. For example- Gardenscapes, Homescapes, etc

DECODING THE MONETISATION: FOR ADVERTISERS

IN-APP ADVERTISING

Here, users are required to watch Ads, The formats include banner ads, pop up ads, video ads, etc. The revenue is based on CPC(cost per click) or CPM(cost per mille).

PRODUCT/BRAND INTEGRATION

A common example of this kind of advertising is seen in sports-based games such as racing and FIFA with billboards.

REWARDED ADS

These kinds of ads provide incentives to the user such as virtual currency. These are more likely to keep the customer interested as you are rewarding them for their time.

ADVERGAMING

These are entirely custom built games developed by a brand aimed at brand recognition. For example: Lexus has a racing game and Jack Daniels has a billiards game.

THE ECOSYSTEM OF ONLINE GAMING

The online gaming ecosystem has been growing impressively over the years thanks to the advancement in technology and the surge in data consumption. But one can't ignore the contribution brands and businesses have made in this growth.

Brands have started acknowledging the potential of Tier-III and Tier-IV cities and advertising has taken a new turn. Now businesses are focusing on expanding their reach, acquiring new customers irrespective of the geographical boundaries.

Even the gaming industry is bringing in new ways to reach the local audience. Addition of desi games such as ludo and carrom is one of the many steps to tap in the potential of Bharat. The scope of advertising in these cities is immense and Bharat is ready for this revolution.

MODES OF ONLINE GAMING

CONSOLE   PC/LAPTOP   MOBILE/TABLET

DECODING THE CATEGORIES-GOOGLE PLAY STORE

EDUCATION
5.3%

SINULATION
5.3%

ACTION
21.1%

STRATEGY
5.3%

TOP 20 FREE APPS

ARCADE
15.8%

BOARD
10.5%

CASUAL
21.1%
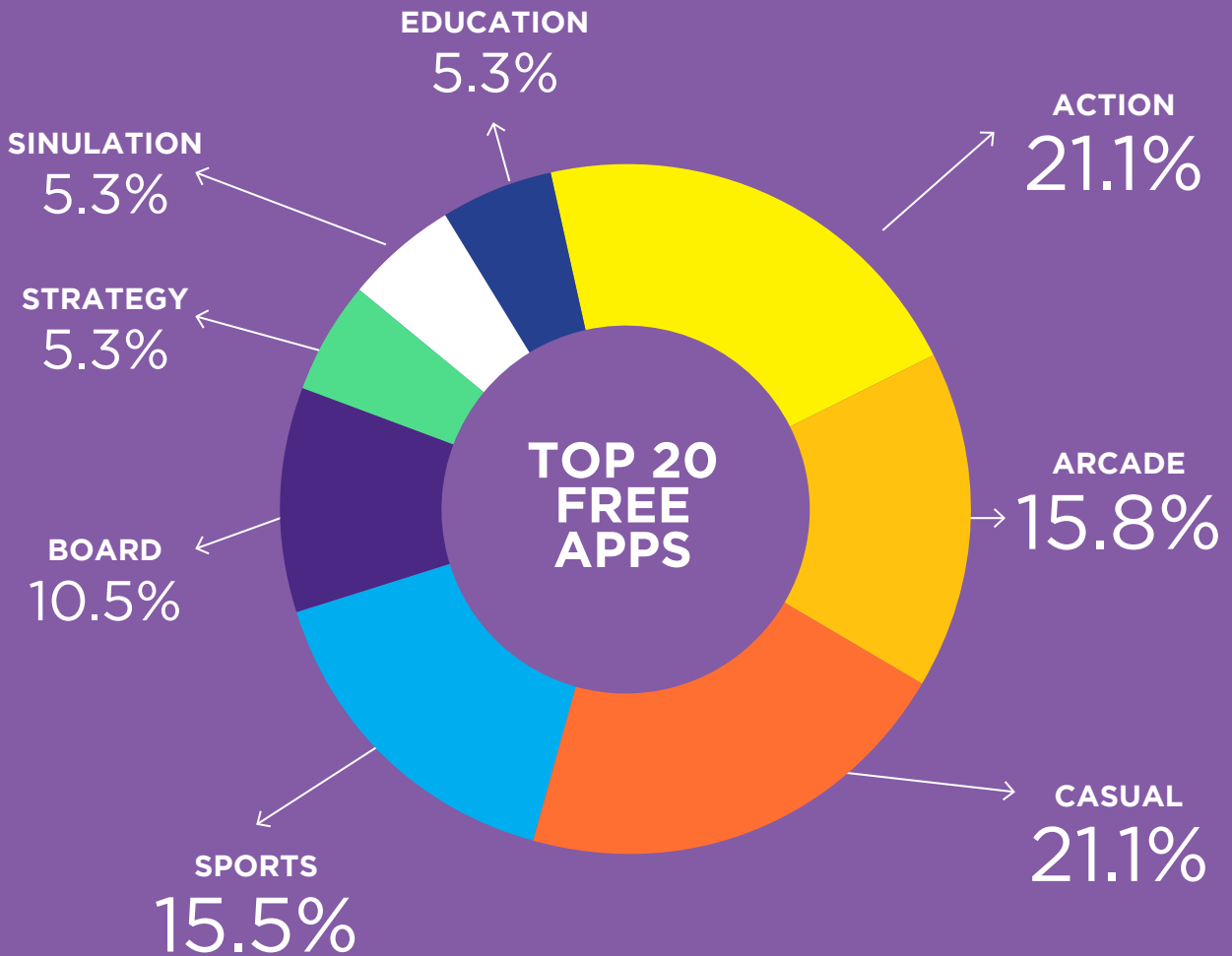
SPORTS
15.5%

Action, Casual, Arcade and Sports are the most preferred genres among them 'top free' category.

This graphic is made according to the data recorded on 20 February 2022. Source: Similarweb

ADVENTURE
5%

CASINO
10%

ACTION
20%

STRATEGY
25%

TOP 20 GROSSING APPS

CASUAL
15%

BOARD
5%
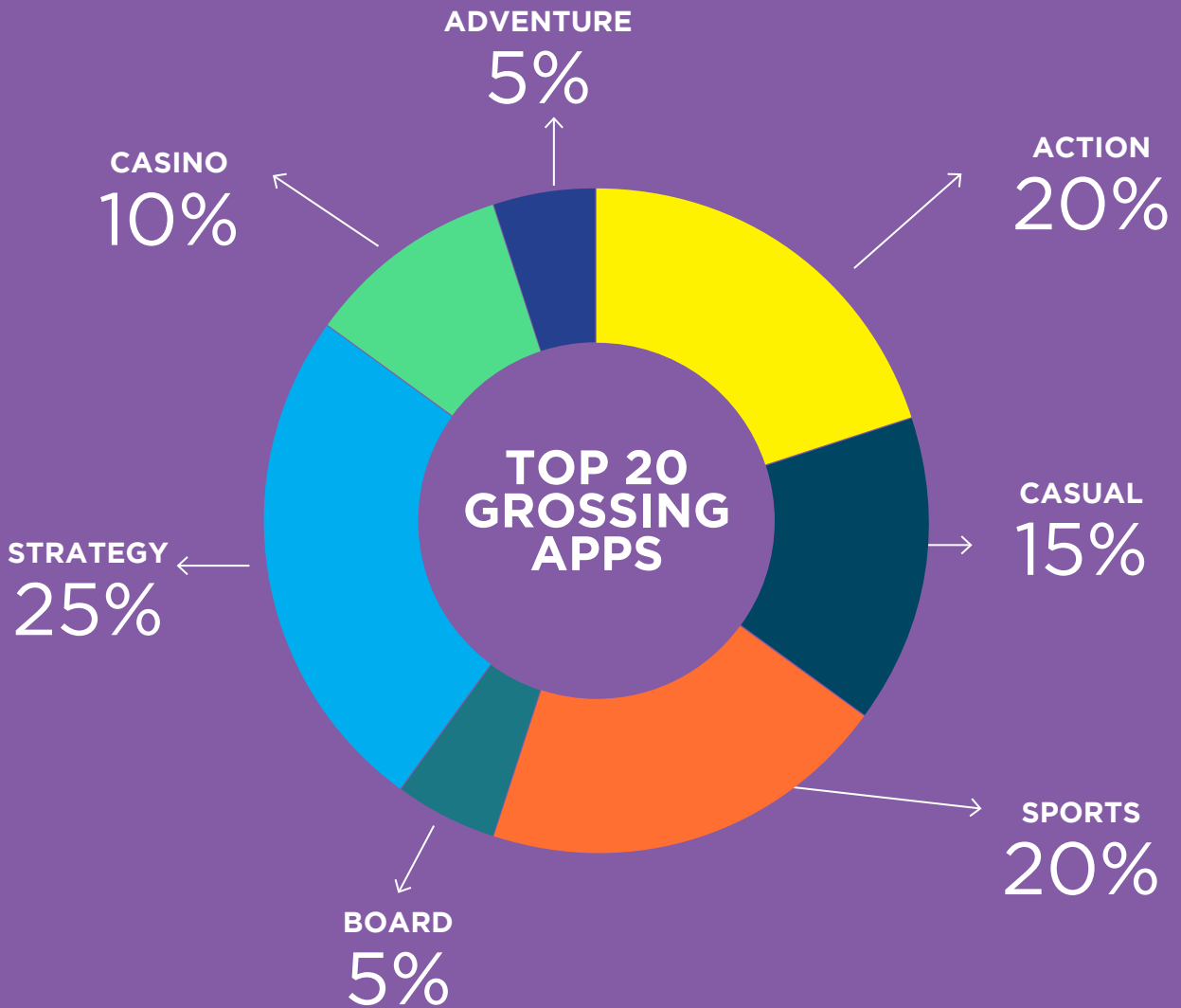
SPORTS
20%

Action, Strategy, and Sports are the most preferred genres among the 'top grossing' category.

This graphic is made according to the data recorded on 20 February 2022. Source: Similarweb

TOP 20 PAID APPS

- **RACING** 10%
- **PUZZLE** 5%
- **SIMULATION** 20%
- **ADVENTURE** 5%
- **BOARD** 5%
- **ARCADE** 15%
- **ACTION** 40%
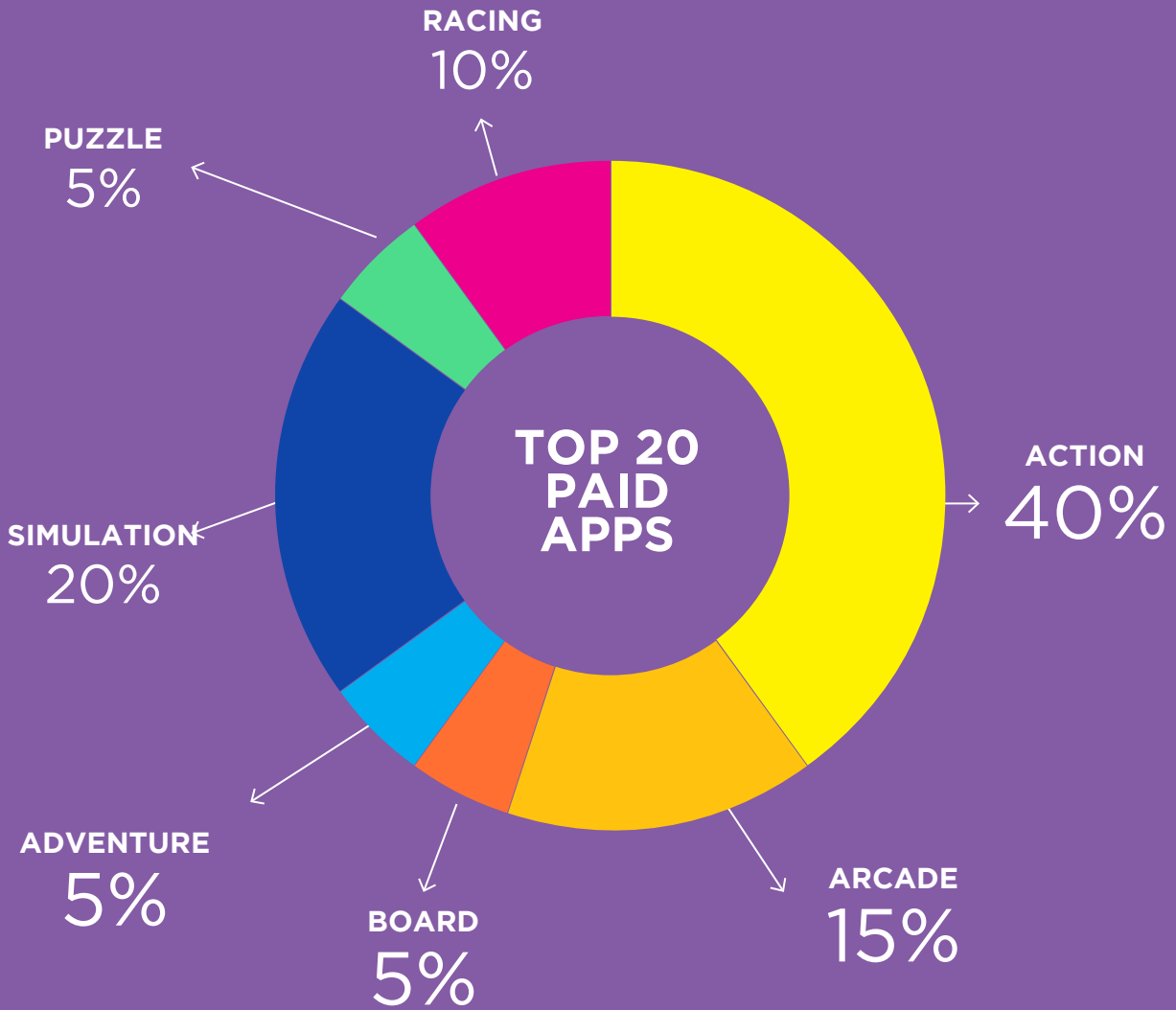
Action, Simulation, and Arcade are the most preferred genres among the 'top paid' category.

This graphic is made according to the data recorded on 20 February 2022. Source: Similarweb

DECODING THE CATEGORIES- APPLE APP STORE

TOP FREE

Battlegrounds Mobile India

Ludo King

Subway Surfers

Slap And Run

Candy Crush Saga

Fishdom

Bazooka Boy

Guns Master

WinZO Games

8 Ball Pool™

TOP GROSSING

Battlegrounds Mobile India

Candy Crush Saga

Coin Master

eFootball PES 2021

Evony

Genshin Impact

Clash of Clans

Rise of Empires: Fire and War

Blackjack 21: Blackjackist

Top War: Battle Game

TOP PAID

Hitman Sniper

Minecraft

Grand Theft Auto: Vice City

RFS - Real Flight Simulator

Grand Theft Auto: San Andreas

Lep's World Plus

Football Manager 2022 Mobile

Pocket Build

The Dark Pursuer

Need for Speed™ Most Wanted

CATEGORISATION BASED ON GENRE

According to a BCG-Sequoia report, mobile gaming is expected to triple to more than **3750 Cr INR** market opportunity by 2025. This surge along with the level of investors interest in the industry are indicative of high growth for the industry.

There are over **30 genres** of games available on the Google play store, and offers a wide variety ranging from sports, strategy, educational, casual, action, arcade and so on. Ios also offers a range of games to choose from.

The surge in online gaming along with the level of investors interest in the industry are indicative of high growth for the industry.

TOP RATED GAMES ON GOOGLE PLAY STORE

TOP FREE GAMES		
ACTION	**STRATEGY**	**SPORTS**
Battlegrounds Mobile India Garena Free Fire - Illuminate **Garena Free Fire MAX** PUBG Mobile Lite **Worms Zone .io - Hungry Snak**	**Clash of Clans** Clash Royale **Train Station 2: Trains Tycoon** Car Games: Advance Car Parking **Bubble Shooter! Extreme**	Carrom Pool: Disc Game **8 Ball Pool** eFootball PES 2021 **Cricket League** Real Cricket™ 20

TOP GROSSING GAMES		
ACTION	**STRATEGY**	**SPORTS**
Garena Free Fire MAX Battlegrounds Mobile India **Call of Duty Mobile Season 1** Marvel Contest of Champions **War Robots Multiplayer Battles**	Clash of Clans **Evony: The King's Return** Lords Mobile: Tower Defense **Top War: Battle Game** Rise of Empires: Ice and Fire	eFootball PES 2021 **Carrom Pool: Disc Game** FIFA Soccer **8 Ball Pool** Cricket League

TOP PAID GAMES		
ACTION	**STRATEGY**	**SPORTS**
Grand Theft Auto: San Andreas Hitman Sniper **Shadow Fight 2 Special Edition** PPSSPP Gold - PSP emulator **JCheater: San Andreas Edition**	• Bloons TD 6 • **GUNS UP! Mobile** • Empire Warriors - Offline RPG • **Five Nights at Freddy's 2** • Age of History II	**True Skate** NBA 2K20 **Football Manager 2022 Mobile** Boxing Gym Story **Athletics 2: Summer Sports**

This graphic is made according to the data recorded on 20 February 2022. Source: Similarweb

TOP RATED GAMES ON APPLE APP STORE

TOP FREE GAMES		
ACTION	**STRATEGY**	**SPORTS**
BATTLEGROUNDS MOBILE INDIA **Subway Surfers** Call of Duty®: Mobile **Bridge Race** Clash of Clans	**BATTLEGROUNDS MOBILE INDIA** State of Survival: The Joker **Age of Z Origins: Tower Defense** Evony **Clash of Clans**	Guns Master **8 Ball Pool™** Carrom Pool: Disc Game **Cricket League** Asphalt 9: Legends Car Game

TOP GROSSING GAMES		
ACTION	**STRATEGY**	**SPORTS**
BATTLEGROUNDS MOBILE INDIA **eFootball PES 2021** Clash of Clans **Roblox** Call of Duty®: Mobile	**BATTLEGROUNDS MOBILE INDIA** Evony **Clash of Clans** Rise of Empires: Fire and War **Top War: Battle Game**	**eFootball PES 2021** FIFA Soccer **Golf Clash** WWE SuperCard - Battle Cards **Mech Arena**

TOP PAID GAMES		
ACTION	**STRATEGY**	**SPORTS**
Hitman Sniper **Grand Theft Auto: Vice City** Grand Theft Auto: San Andreas **Lep's World Plus** The Dark Pursuer	Hitman Sniper **Papa's Freezeria To Go!** Plague Inc. **Five Nights at Freddy's** Guns'n'Glory Premium	Football Manager 2022 **Mobile** HB2 PLUS **True Skate** Real Steel **Alto's Odyssey**

This graphic is made according to the data recorded on 20 February 2022. Source: Similarweb

SWIPE RIGHT ON YOUR PERFECT MATCH

Today, almost everyone out there has at least one game installed on their smartphone. But every user has a chosen game, genre etc. Some don't mind paying, some want to enjoy gaming without paying any fee. Some enjoy playing alone to relax their mind, some even like to play with tens and hundreds of other players. When it comes to monetization, In-app purchases(IAPs) and In-app advertising(IAA) have become two of the most popular ways of advertising.

Keeping the consumer behaviour and preference in mind while devising a marketing strategy is crucial. So, how do genres affect the IAPs and IAAs?

The primary objective is to maximise revenue but user retention, enhancing the overall experience for the user should not be ignored. Different forms of advertising can have different outcomes and it is important to understand what works best for your brand.

BANNER ADS

- Generally displayed at top or bottom of the screen, banner ads display a clear CTA(call to action)

- Apt for games which don't require users to control the screen consistently (like in battle royale)

- Good for brand and performance ads

INTERSTITIAL ADS

- Displayed as images or videos, these ads take over the entire screen. Unlike banner ads, they don't interfere with the gameplay

- Apt for games which have no IAPs so revenue model is based on IAAs only

- Good for running creatives, suitable for casual games which have different levels so ads can be integrated accordingly

INCENTIVE ADS

- Reward based ads, usually offer virtual currency for watching an Ad

- Apt for games which have a virtual currency to offer, or other values that can benefit the user for example extra lives or even daily rewards

- These can be a mix of both playable ads or product based ads, revenue generation is almost achievable as users don't mind watching an ad in lieu of a reward
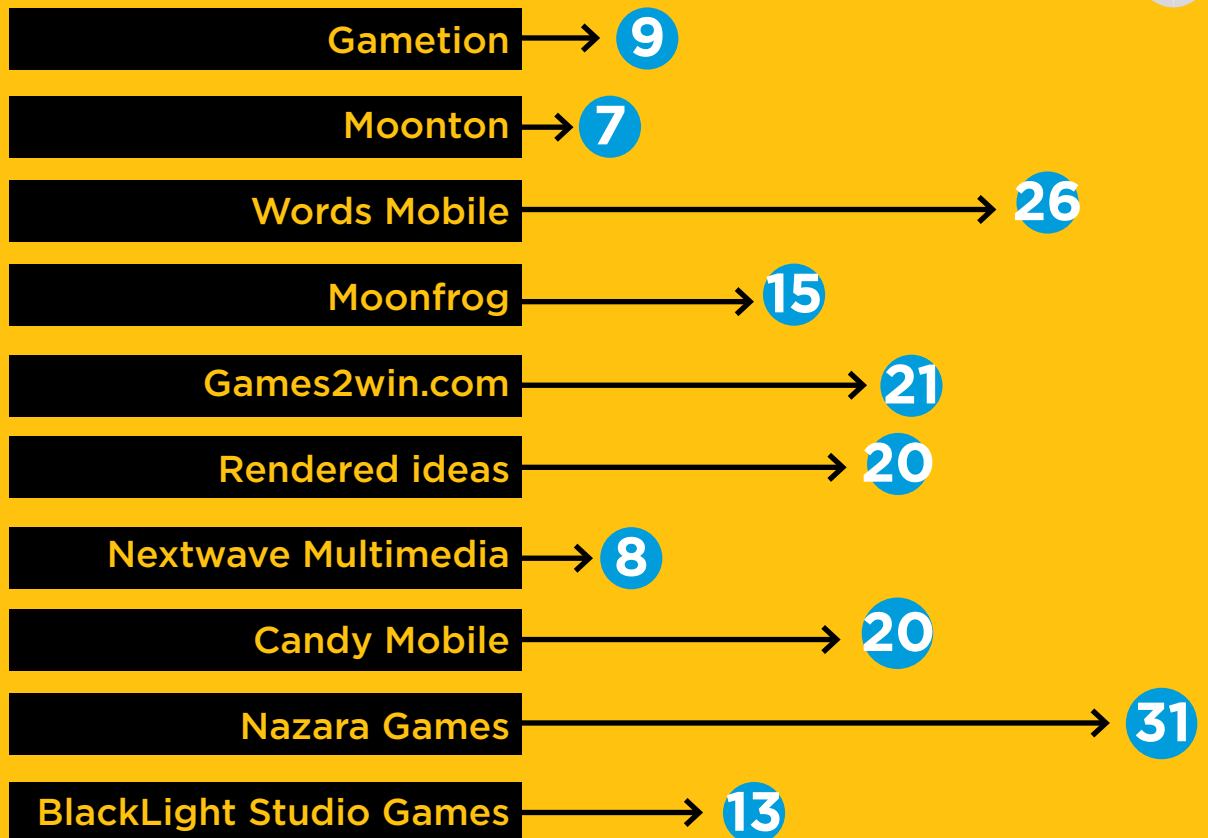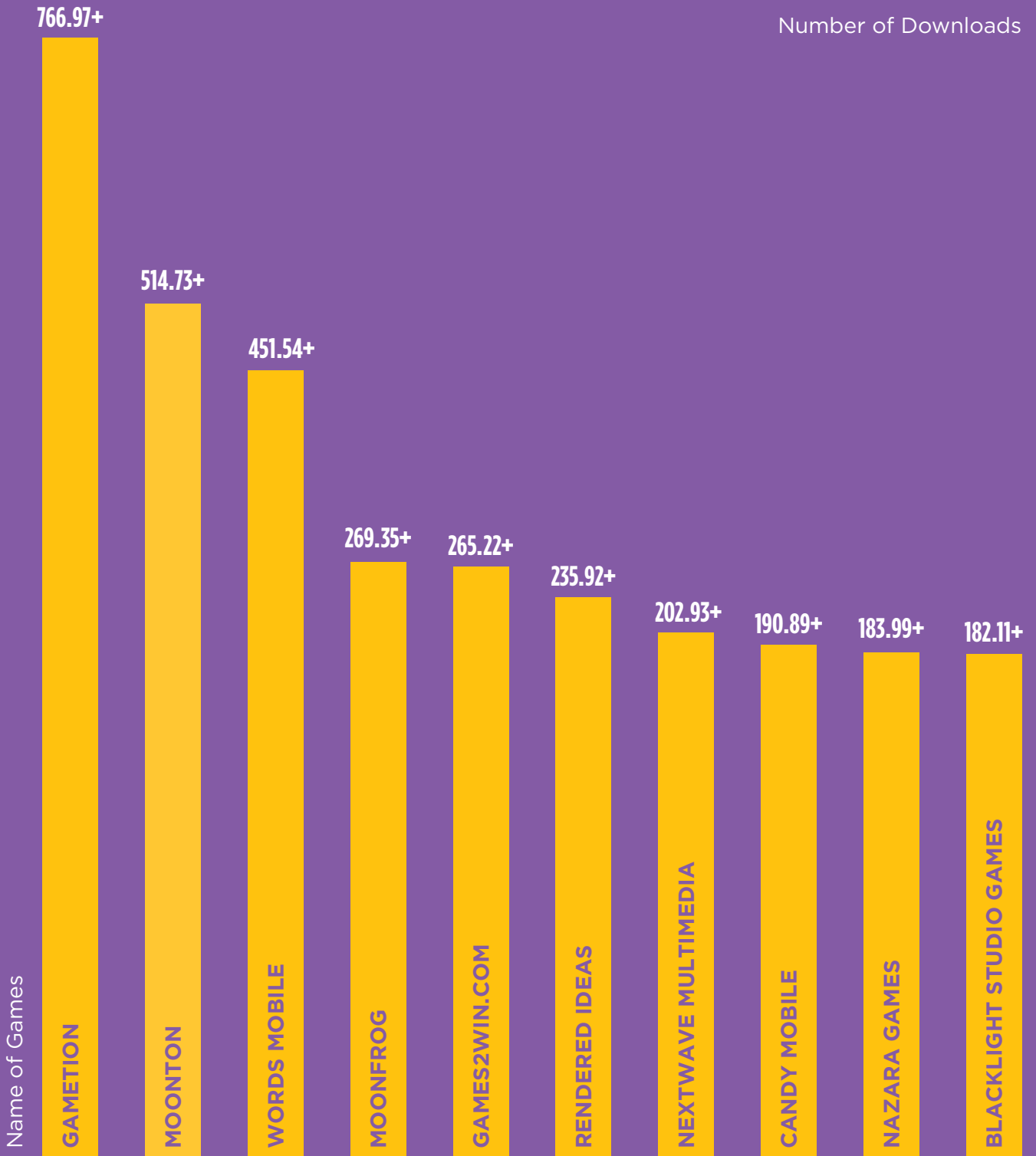
BHARAT'S GAMING INDUSTRY

According to research by 42matters, there are more than **4,792** Indian publishers on Google Play out of all **159,473** game publishers. The most popular games are Ludo King™, World Of Carrom: 3D Board Game, Bottle Shooting Game, Bus Simulator Games: Bus Games, Indian Bikes Driving 3D, Ludo SuperStar, Cutie Garden, Motu Patlu Speed Racing, Ludo Comfun Online Live Game, Teen Patti Gold Poker & Rummy.

TOP INDIAN PUBLISHERS
NUMBER OF GAMES ON PLAY STORE

Publisher	Number of Games
Gametion	9
Moonton	7
Words Mobile	26
Moonfrog	15
Games2win.com	21
Rendered ideas	20
Nextwave Multimedia	8
Candy Mobile	20
Nazara Games	31
BlackLight Studio Games	13

Number of Downloads

Name of Games

Game	Downloads
GAMETION	766.97+
MOONTON	514.73+
WORDS MOBILE	451.54+
MOONFROG	269.35+
GAMES2WIN.COM	265.22+
RENDERED IDEAS	235.92+
NEXTWAVE MULTIMEDIA	202.93+
CANDY MOBILE	190.89+
NAZARA GAMES	183.99+
BLACKLIGHT STUDIO GAMES	182.11+

Above mentioned graphic shows data according to 42matters.com.

INFLUENCERS- THE ROCKSTARS OF ESPORTS

Influencer marketing has been a buzzword for sometime now, and gaming has become the next new, exciting market. YouTube reported about five of the top ten creators in India were gaming creators in 2021. Live streaming on the platform is one of the most followed trends.

With gaming becoming so popular, it's time for brands to tap into this potential. The opportunity to create awareness, reach new customers, and build a community is immense.

There is no limit

If numbers are to be believed, gaming will continue to reach new heights. The popularity and the recognition the influencers hold is unmatched. It is not news that influencers have proved to be the face of brand marketing and gaming is not an exception to this rule.
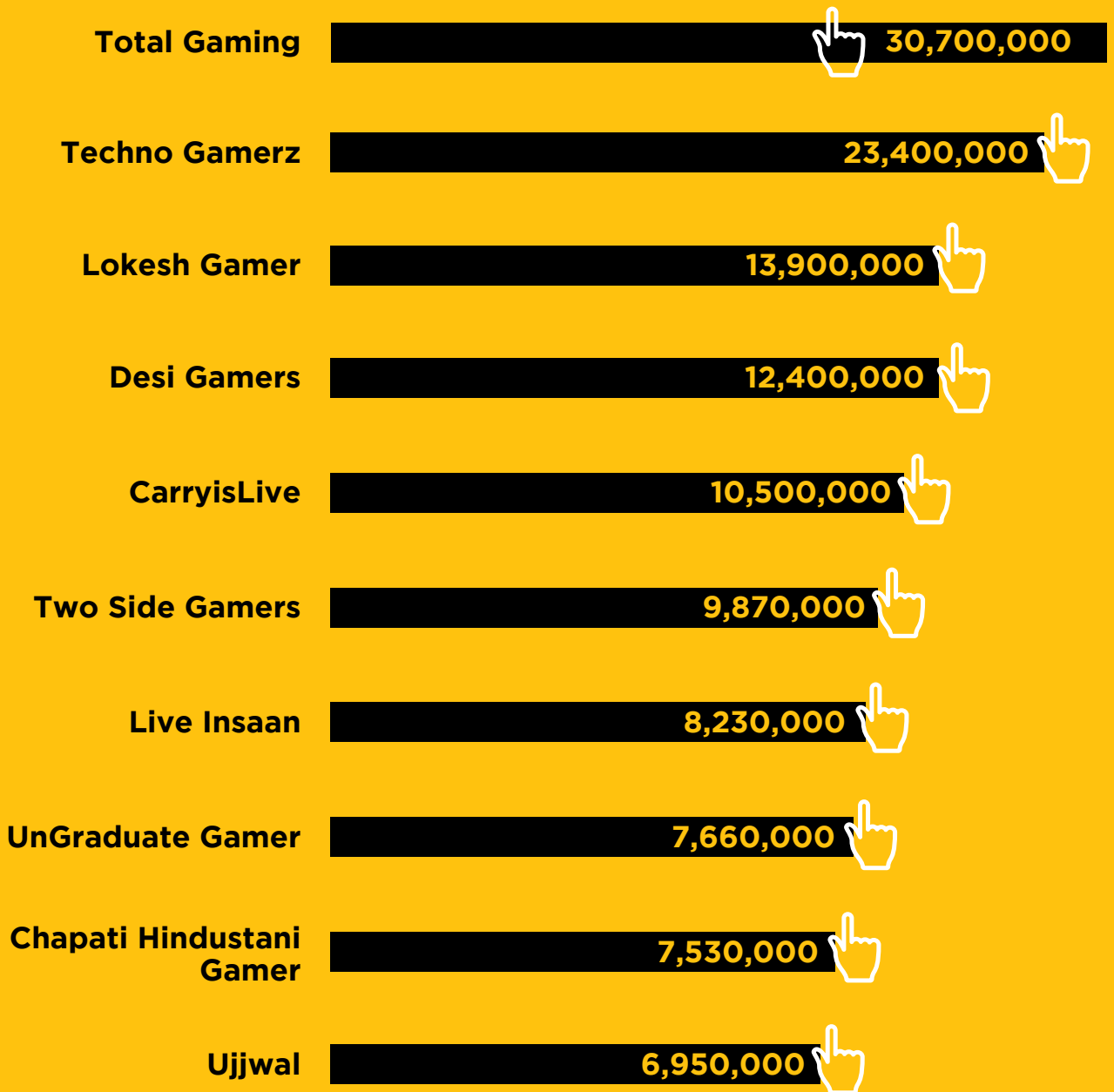
The audience sits for hours looking at their favourite influencers, think about the impact this can have for the brands and advertisers.

There is a seat for everyone

Budget has always been the constraint for a lot of SMBs in the past when it comes to mainstream marketing, but influencers have changed this dynamic too. There's an influencer for almost every brand/advertiser out there. With so many content creators with different numbers of followers, demographic, target audience a brand has the freedom to choose. Unlike old days when only models and actors used to enjoy fame, now there's a whole new wave of content creators. With smart decisions, businesses can thrive under this influence.

TOP
GAMING CHANNEL ON YOUTUBE
IN INDIA (BY SUBSCRIBERS)

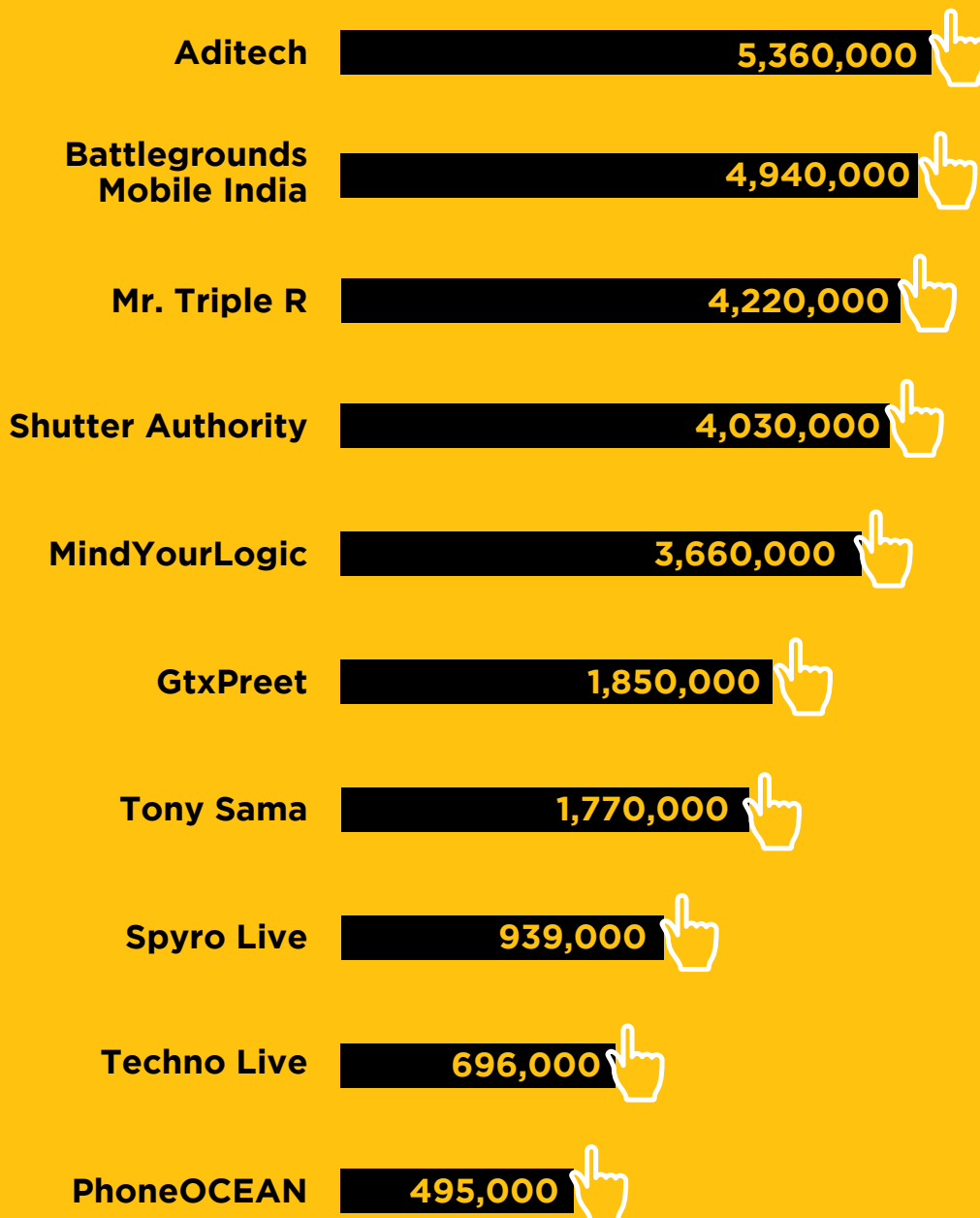| Channel	Subscribers
Total Gaming	30,700,000
Techno Gamerz	23,400,000
Lokesh Gamer	13,900,000
Desi Gamers	12,400,000
CarryisLive	10,500,000
Two Side Gamers	9,870,000
Live Insaan	8,230,000
UnGraduate Gamer	7,660,000
Chapati Hindustani Gamer	7,530,000
Ujjwal	6,950,000

This graphic is made according to the data recorded on 20 February 2022.
Source: Similarweb

TOP
GAMING CHANNEL ON YOUTUBE
IN INDIA (BY SUBSCRIBERS)

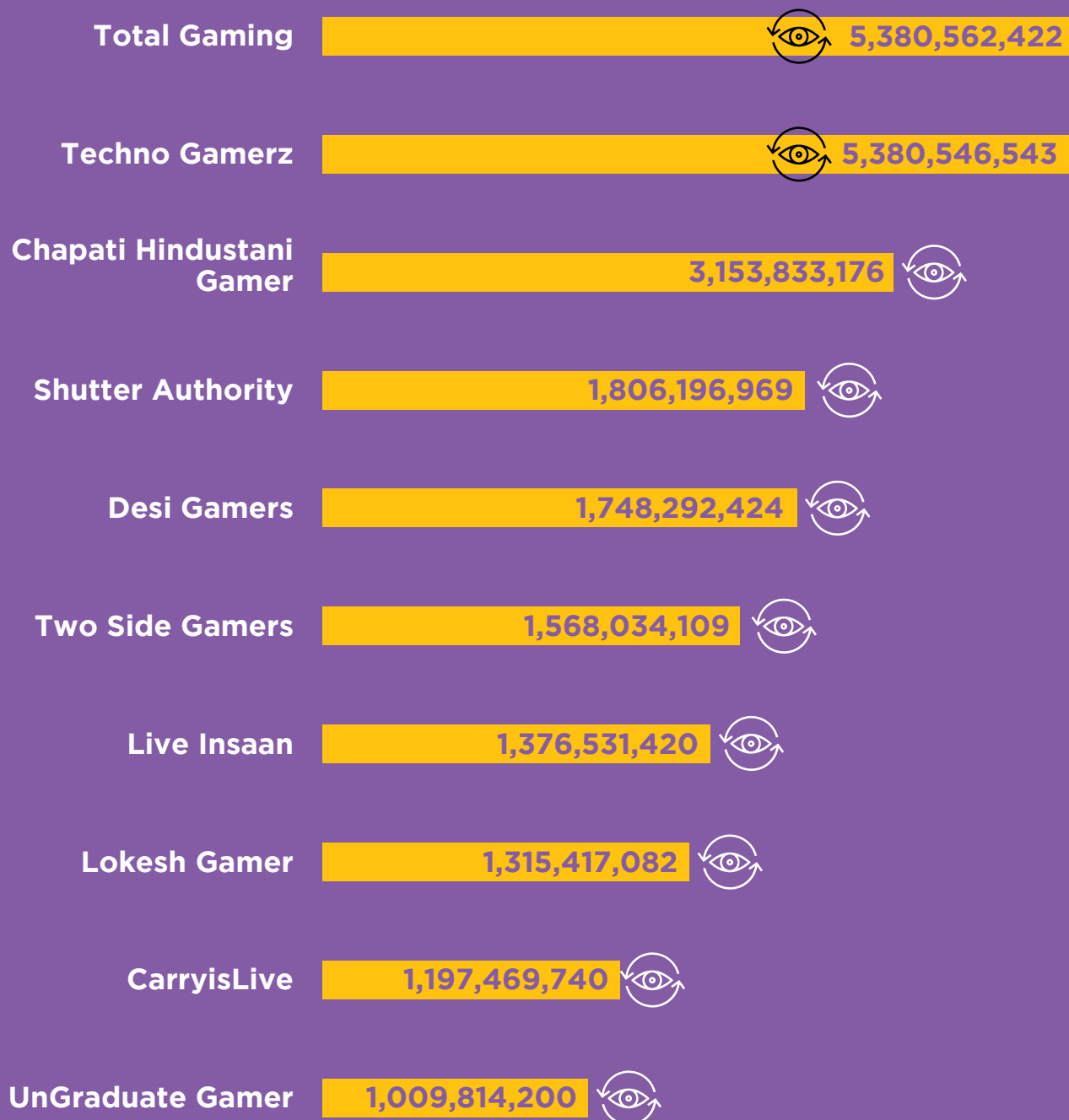| Channel	Subscribers
Aditech	5,360,000
Battlegrounds Mobile India	4,940,000
Mr. Triple R	4,220,000
Shutter Authority	4,030,000
MindYourLogic	3,660,000
GtxPreet	1,850,000
Tony Sama	1,770,000
Spyro Live	939,000
Techno Live	696,000
PhoneOCEAN	495,000

This graphic is made according to the data recorded on 20 February 2022.
Source: Similarweb

TOP
GAMING CHANNEL ON YOUTUBE IN INDIA (BY VIEWS)

Channel	Views
Total Gaming	5,380,562,422
Techno Gamerz	5,380,546,543
Chapati Hindustani Gamer	3,153,833,176
Shutter Authority	1,806,196,969
Desi Gamers	1,748,292,424
Two Side Gamers	1,568,034,109
Live Insaan	1,376,531,420
Lokesh Gamer	1,315,417,082
CarryisLive	1,197,469,740
UnGraduate Gamer	1,009,814,200

This graphic is made according to the data recorded on 20 February 2022.
Source: Similarweb

TOP
GAMING CHANNEL ON YOUTUBE IN INDIA (BY VIEWS)

Channel	Views
MindYourLogic	718,969,941
Mr. Triple R	677,902,929
Ujjwal	643,307,226
ADITECH	505,729,372
Tony Sama	487,131,164
Spyro Live	370,867,009
GtxPreet	285,607,230
Battlegrounds Mobile India	281,547,137
PhoneOCEAN	164,056,843
Techno Live	131,046,972

This graphic is made according to the data recorded on 20 February 2022.
Source: Similarweb

Ways to market your brand

There are a number of ways gaming influencers can work as important levers of the marketing plan. Paid content/partnerships has several formats such as unboxing videos, product reviews, PC hardwares, consoles, etc.

YouTube Shorts is also used by a lot of creators today to shoot short form content. It is common that businesses collaborate with the influencers from their own industry, for instance a fashion brand will look for fashion based content creators.

However, the dynamic is changing in the gaming industry. Where earlier only gaming brands were seen collaborating with the influencers to promote their games, now even brands from other industries are taking an interest in this side of the market.

For instance, a smartphone brand can collaborate with a gaming influencer to promote a phone with good battery capacity, screen resolution and higher RAM. Similarly, a laptop brand can use influencers to promote their line of products.

Sponsorships and campaigns

Event sponsorships is an age old marketing strategy, and it hardly goes wrong. Just like any other marketing campaign brands can launch a campaign around online gaming and reap the benefits. The objective is to mainly create brand awareness and expand the audience reach here.

This also allows a great opportunity for product placement. For instance, an energy drink can become the go-to drink for the participants. The winning trophies, merchandise, jerseys all can have the brand logos.

All comes back to the vision

No matter what the platform is, or the budget is- influencer marketing is a strong tool and here to stay for a long time. It is time brands realise the potential and start investing. This being said, devising the right strategy, maximising on the resources available, aligning with the business model- all these factors play a big role.

Influencers have emerged as important pillars for brand marketing and it is time to dive in!

GAMING: DRIVING THE NEXT WAVE OF MEDIA CONSUMPTION

Video games have always been a part of popular culture. Some games such as Mario Kart 64 or Super Mario 64 have even managed to create an emotional, nostalgic bond with the audience.

The early 2000s marked the emergence of gaming in India. However, only middle-income or rich households could afford to be a part of the gaming community due to the high cost of PCs, consoles, etc. Games such as Call of duty, FIFA, Counter-Strike became popular amongst the Indian audience. Access to the internet and a PC combined with the CGIs and multiplayer approach drove the rise of these games.

Then came the online gaming era. People were exposed to social media and started exploring various online games. Farmville, Mafia Wars are some of the games which became a favourite. Not only did they offer the ease of playing a game without downloading it on your computer, but they also gave you a chance to stay connected with your peers. This also meant new genres entering the battlefield. Action-centric games now shared the stage with mystery, adventure sci-fi, and other genres.

Mobile Gaming: The Golden Era Of Gaming

Smartphones, or phones as we call them today are easily one of the top 10 inventions of all time. After 2010, mobile gaming took the centre stage and has been there since then. Audiences loved the ease, convenience, and affordability of mobile games. Increased internet penetration across Bharat also contributed to this growth.

Today, the best phones out there have the high processing power, storage, resolution, and graphics to provide an unmatched gaming experience. Gaming phones have become a category smartphone brands offer.

WAYS TO REACH THE TARGET AUDIENCE

Ad Networks

Communities

Tournaments

Team Associations

Influencers

In-Game Integrations

The adoption of mobile phones has broadened the gaming industry by a significant number. There's a game for everybody, and there's a game on every mobile phone. Irrespective of the geographical location, age, gender, users are engaging in e-gaming more than ever.

Gaming is slowly taking over the traditional entertainment space, thanks to the streaming platforms such as Twitch and YouTube. This rise has been attracting the interest of marketers and brands, they want to know the whys and hows of the industry.

Ad Networks
(In-Game Inventory)

An Ad network acts as a mediator between the advertiser and the publisher. Serving the perfect ads to the target audience, maintaining the CPM/CPC all are managed by Ad networks. The various formats used are reward-based ads, programmatic ads, campaigns, playable ads, etc. The format depends highly on the game niche and the target audience.

Ad networks play a highly important role in the overall monetization strategy for publishers and advertisers. Some of the factors to consider while choosing an Ad network are high fill rate, analytics support, and training, regular updates, KPIs such as Cost per Click, Cost per Install, Cost per View, etc.

Ad networks are highly responsible for tracking and maintaining the ROI. It provides a solution for every kind of budget and hence can be a great tool to test out the waters before launching a big campaign across various platforms. This gives a fair idea of your target audience and consumption behaviour. Although, it is important to be realistic about the goals and avoid over-indexing on certain titles or genres. It is also crucial to choose the right network and work together on reaching the audience while ensuring brand safety and positioning in the market.

Communities

Gaming fandom or communities is another way to reach the target audience. Platforms such as Discord allow the users to engage with like-minded players, thus forming communities. This can be used to market the brand, launch a campaign, etc. Providing incentives, offers, discounts are some other ways. Streaming platforms such as YouTube can't be ignored for brand awareness. Video ads on the platform are highly recommended for

advertising today.

These methods are great as they can be tracked easily with the impressions generated. Discord has features such as live-tagging, event, screen share which provide a highly flexible environment for brands. YouTube ads are an age-old tool in the advertising industry and rightly so.

While most of the features on Discord can be used for free and budget is not a constraint, it is advised to monitor the communication and ensure the brand message is clear. It is very easy to get a bad image for certain actions and get involved in a scandal.

Esports Tournaments

Esports tournaments offer great potential for all brands and all sizes. Millennials are highly engaged in these tournaments and they can be utilised for driving purchases, brand recognition, etc. It starts with finding the right audience, targeting the right channels, and devising a good content strategy.

There are several ways to make use of the opportunity- sponsoring the event, experiential marketing via booths, contests, venue branding, etc. Starting an esports team of your own, launching merch, partnering with key influencers accordingly, and creating exclusive content pre-event

CPM – COST PER MILE

An advertiser is charged every time his or her ad is displayed a thousand times.

CPC – COST PER CLICK

An advertiser is only charged whenever a click is made on his or her ad.

CPI – COST PER INSTALL

The advertiser is charged per installation.

CPA – COST PER ACTION

An advertiser is charged when a specific action takes place.

CPV – COST PER VIEW

An advertiser in this case is charged according to the number of views his or her video ad receives. This KPI is used for video based campaigns.

to create a buzz are some other ways. Not only does it create a realistic, hands-on product experience but competing for sponsored prizes can add extra points to the brand value and recognition.

This is a fascinating and engaging way to reach the customers but it is important to pre-calculate the amount of effort it will take and prepare your team accordingly. Having an experienced team is a crucial part of implementing this strategy. Brands can also partner with agencies to manage the campaign, but it might add to the overall budget.

Team Associations

From branding logos on jerseys, partnering with professional gamers, even signing deals to name the teams, brands can leverage this opportunity. Although, this is more suitable for brands with endemic brands for esports, or when the gaming fans are your target audience. For instance, an energy drink brand can create a campaign and collaborate with gamers to promote the product effectively.

Competitive gaming is getting bigger than ever and the advent of esports brands such as Fnatic, SoloMid in the Indian market has made the industry even more promising. They are competing with domestic organisations such as Global esports, Team SouL, Orange Rock, and more.

Given that this can be highly successful for certain brands, it is vital to not go overboard and invest wisely. The ROI tracking can be a difficult task due to the volatile brand exposure and brands need to keep this in mind while devising a strategy.

Influencers

Influencers or creators have become an important pillar of marketing today. Gaming influencers have a loyal fanbase, and brands are using this to influence the masses' purchasing decisions. Apart from social media posts and product reviews, live streaming and native advertising are also gaining popularity.

Collaboration can be done across various platforms such as Instagram, Facebook, YouTube, etc. Moreover, reaching the local audience becomes easier by using vernacular content and regional influencers.

The power of a shout-out is not unheard of, and if used properly, social media can be the key to branding. However, it is a double-edged sword and advertisers should ensure staying out of scandals and bad publicity. Using paid followers and likes is also

IN-GAME INTEGRATION VS CUSTOM BUILT GAME

	Custom Built Game	In-game integration
Wish to sustain a branded community in gaming	yes	
IP is timeless & relatable to target audiences	yes	yes
Wish to create a highly immersive experience	yes	yes
Do not have a strong, existing digital community around our brand		yes
Need to promote something timely to a scaled audience		yes
Want to use gaming as a promotional tool		yes
Brand doesn't translate effortlessly into a game		yes

something to watch out for.

In-Game Integrations
This is suitable for brands with a less digital user base, aiming to generate brand/product awareness. The gaming industry has a lot of timeless classics, already established games with huge fan bases, and this should not be ignored.

With the huge following, it can be a little tricky to identify the target audience but that being said, this is an excellent way of creating a buzz for your product. Although, brands should watch out for extended development timelines and publishers' interest and willingness to collaborate.

OTHER FACTORS
TO KEEP IN MIND

CROSS PLATFORM MARKETING

It is advised to be present across various platforms to boost visibility. It is important to combine two or more routes to lower the risks and maintain consistency.

KNOW YOUR T.A.

Like any other marketing strategy, identifying the target audience is the first and most important step. There is no point in selling a product to people who don't need it in the first place. If the aim is to drive sales, knowing the key demographic is essential.

USE DATA AND LEARNINGS

Brands must make data-backed decisions to ensure success. Instead of turning a blind eye to previous learnings, it is important to understand the drawbacks and work on them.

DON'T UNDER OR OVER ESTIMATE A GAME BY ITS TITLE OR GENRE

Some genres are more preferred, and some games emerge as the all-time favourites. But don't set goals blindly just based on the audience preference or the number of users. For instance, a fashion-based brand will not benefit from an arcade, battle royale game as much as it will benefit from a fashion/store-based game. In the bigger picture, arcade is a bigger and more popular category but that's not where your audience lies.

BRAND SAFETY MUST BE ENSURED

It is easy to get lost in the trends and get blinded by the popularity. But brands must ensure that the tone of the brand is maintained in a positive environment. Avoid working with blacklisted publishers and maintain transparency as much as possible.

GAME CHANGERS OF INDIA

Like traditional gaming, esports has organised competitive leagues and tournaments. The teams usually compete against each other for various prizes, including cash. These can be sponsored prizes, and hence presents another opportunity for branding. Here we cast a spotlight on the top teams, leagues and tournaments.

TOP MAJOR LEAGUES	ORGANISER
Battlegrounds Mobile India Series	Krafton
Dreamhack	Nodwin
ESL India Premiership	Nodwin
Esports Premier League	India Today Gaming
India Today League	India Today Gaming
Indian LAN Gaming	LXG
Skyesports Championship	Skyesports
Valorant Conquerors Championship	Nodwin
World Esports Cup	India Today Gaming

TOP TEAMS

- **IND**
- **GODL**
- **SKYLIGHTZ**
- **SOUL**
- **TSM**
- **FNATIC**
- **VLT**
- **GE**
- **XO**
- **OR**

TOP 10 EVENTS BY PRIZE POOL

Battleground Mobile India Series

Battleground Mobile Open Challenge

Battleground Mobile Pro Series

Esports Premier League

Free Fire India Championship

Free Fire Pro League India

Indian LAN Gaming

Skyesports Championship

Valorant Conquerors Championship

World Esports Cup

CASE STUDIES

GILLETTE - GET YOUR FACE ON CAMPAIGN

PUBG became popular pretty quickly and stayed number one choice for battle royale. But in september 2021, it got banned in India due to privacy concerns. Unfortunately, players had a hard time finding an alternative but just then BGMI was released in India.

This news was received with a lot of enthusiasm from the gaming community, and Gillette announced their "Get Your Face On" campaign to celebrate the advent of PUBG's Indian adaptation. The brand collaborated with five influencers- Mortal, Scout, Ghatak, Jonathan, and Nemo.

Gillette has been a supporter of the sports for sometime now, and was also recognized as "Brand of the Year" at the Tempest Awards for its work in the esports and gaming community in 2021.

INSTAGRAM ENGAGEMENT (OVER 800K+ LIKES)

THE CAMPAIGN INCLUDED THREE STAGES:

• Pre launch stage had images of influencers getting ready for the relaunch

• There was a moving image campaign celebrating the launch of BGMI in India

• A final match with all the influencers (face of the campaign)

AXE WORLD CRICKET CHAMPIONSHIP 3

HUL's grooming brand Axe entered the gaming space in India with World Cricket Championship 3. The in gaming partnership was implemented by Mindshare and GroupM ESP. WW3 has been downloaded more than 160 Mn times and boasts of features such as career mode with over 400 tournaments, international leagues, women's cricket, and more. The brand had just launched a new product in the market.

The bodyspray which was advertised as "dual action", claimed 48 hours of odour protection and long-lasting fragrance. Timing also worked in the brand's favor as the campaign coincided with ICC Cricket World Cup 2021. Axe was targeting their young audience using the game as a way of connecting and reaching out.

The campaign was a success as the brand awareness scores went up by **47%** and consideration by **22%**. Further, the brand proposition had approximately 3 Mn impressions daily with total 1.8 Mn active brand interactions, also called 'Axe Daily Bonus'.

AXE WORLD CRICKET CHAMPIONSHIP 3

The brand realized the rise in interest in cricket-centric mobile games during the mega-events and WCC3 was a leader in the space. So the CPG brand launched 'Axe Dual Benefits' campaign within WCC3. This is not an explored path for traditional brands.

In-game integration is an excellent way of brand communication. Axe kept cricket kits as rewards, and on an average atleast two players were rewarded in a day. The game also offers player upgrade cards- where users get one upgrade for one skill.

For instance, if a user gets the upgrade card he can upgrade either one of his skills such as batting, fielding, etc. With Axe Dual Benefit, users got a chance to upgrade two skills at once thus providing more benefits to the players.

CHUPA CHUPS

Chupa Chups is a Spanish brand popular for its candies, chewing gums, and lollipops available in over 100 flavors. Present in over 150 countries, the brand's core philosophy is 'sharing happiness with everyone irrespective of their age'.

Staying true to the tagline, "Karte Raho, Fun Fana Fun Fun" the brand wanted to target young adults. While the brand enjoys 90+% awareness in its audience, driving consideration within teens and tweens had been a key challenge for the brand. Chupa Chups partnered with Loco, one of India's foremost game streaming platforms to create social acceptance and establish itself as a fun, cool brand.

The partnership was conceptualized and executed by GroupM ESP.. The brand

THE SUCCESS FACTORS

• Identifying the right games

• Identifying the right moments where our branding was placed

• Choosing the right ambassadors for promotion

CHUPA CHUPS

Both games were hosted on LOCO app as a tournament, which lasted for 6 weeks. It began in october'20 and ended in december'20. Winners were rewarded with a gaming console weekly.

Banners ads were displayed on the homepage near the popular streaming section. Other than that, several mini banners were integrated across the app reminding the users about the contests.

wanted to connect with the consumers and their inner kids within them. The task was to keep the fun alive while increasing the 'Coolness Quotient' amongst the audience.

To get maximum gameplays, the brand decided to develop two games, a skinned version of Loco's chartbuster game **Bull-Bash,** another was Loco's take on iconic **Snakes game**.

e4m

GAME ON

ONLINE GAMING SUMMIT

CO-POWERED BY

INMOBI

INNOVATION PARTNER

Xapads

ASSOCIATE PARTNER

LOCO

TRADE MEDIA PARTNERS	MUSIC COMMUNITY PARTNER	BUSINESS MEDIA PARTNER
e4m [IMPACT] Pitch समाचार Realty+	loudest	BW BUSINESSWORLD