



Confederation of Indian Industry

iDES
INDIAN DIGITAL GAMING SOCIETY

INDIAN GAMING INDUSTRY

OVERVIEW, MARKET SIZE, POTENTIAL, SEGMENTATION AND
GENRE



INDIA'S VIDEO GAMES MARKET



TOTAL GAME REVENUE *



* This excludes revenue from real money games (RMG)



TOTAL GAMERS *

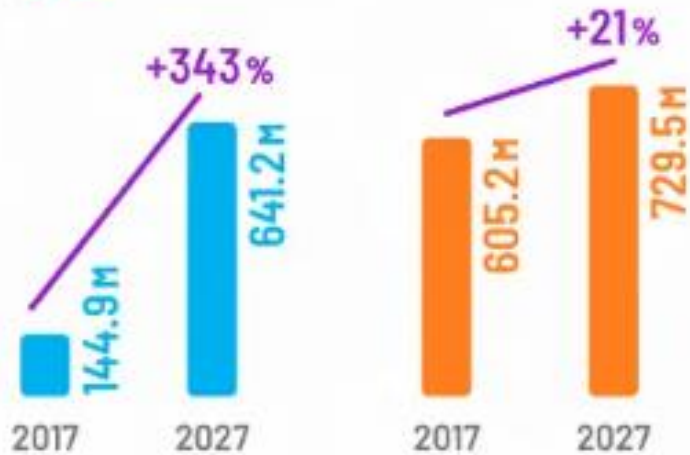


* Includes mobile, PC and console



INDIA VS CHINA GAMERS *

● INDIA
● CHINA



INDIA'S GAMERS



of Indian gamers play on smartphones and tablets (mobile devices)



Total gamers who spend on video games

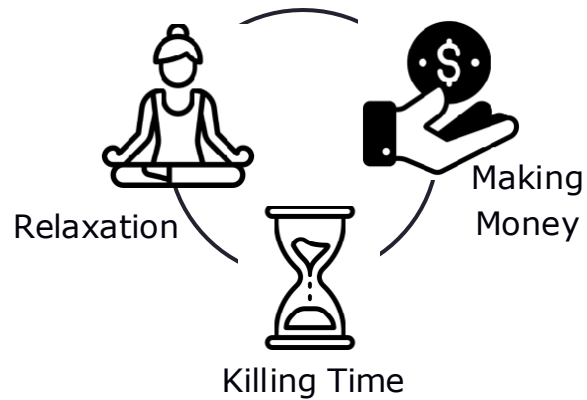


of gamers engage with esports*



INDIA'S VIDEO GAMES MARKET

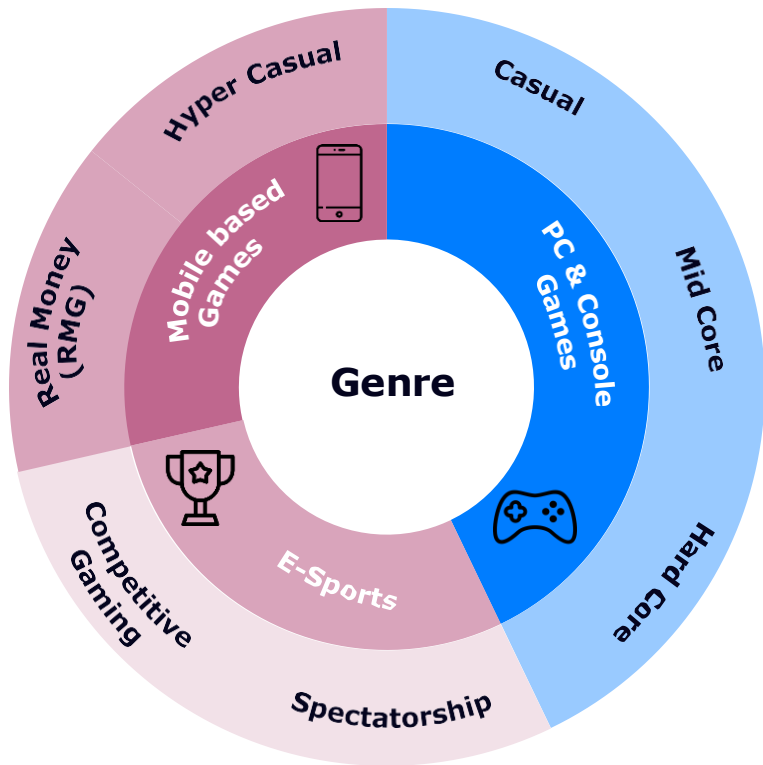
Top 3 Motivations to Play



Weekly
Activity²

- The India video games market generated revenue of \$868 million in 2023, up 15.9% YoY, a slight decline from the 19% growth in 2022.
- 3% of gamers spend money on video games, with monthly ARRPU standing at \$0.29.
- The India video games market is set to grow 13.6% in 2024, with revenue of \$943 million, surpassing \$1 billion in 2025, and is forecasted to reach \$1.5 billion in 2027, growing at a 5-year CAGR of 17.2%.
- India is the fastest growing market.
- Mobile games in India will continue to dominate the gaming pie by spending, accounting for 77.9% of total revenue, followed by PC (14.5%) and console (7.7%).
- India anime market size was valued at USD 1,642.5 million in 2023. The market is anticipated to grow from USD 1,855.4 million in 2024 to USD 5,036.0 million by 2032, exhibiting a CAGR of 13.3% during the forecast period.

OVERVIEW: GAMING GENRE



PC & Console Games

- **Casual:** Simple & repetitive action games, played on PC & Console
- **Mid core:** Simple games usually with a resource management theme
- **Hard Core:** Games involve complex & multi-faceted games



Mobile Based Games

- **Hyper Casual:** Ultra simple & low graphic games
- **Real Money (RMG):** Skill based / luck based with real money, usually played on mobile



E-Sports

- **Competitive Gaming:** Popular Multiplayer games (Hard Core) played professionally
- **Spectatorship:** Viewing tournaments and professional gamers

INDIA'S ESPORTS MARKET

Indian Esports Industry



Growth Drivers

- The eSports market in India was valued at approximately \$68 million in 2021 and is projected to reach \$151 million by 2025. Total revenue includes Streaming Revenue, Prize pool and Sponsorship
 - The investment in eSports infrastructure in India is expected to grow at a CAGR of 20% over the next few years.
 - By FY2025, India will have 1.5 million esports players
-
- Increased smartphone penetration in India – nearly 1 billion smartphones will be in use in the country by FY2025
 - Consequently, internet users would cross 1 billion, reaching over 80% of India's population by CY2025
 - Over 10% of handsets sold in the country will have capabilities to support professional grade esports
 - Nearly 50% of the Indian population, being younger than 24 years of age, will drive overall gaming growth
 - Digital India push by the Government is boosting less expensive made in India handsets and affordable broadband availability

ANIME INDUSTRY

India anime market size was valued at USD 1,642.5 million in 2023. The market is anticipated to grow from USD 1,855.4 million in 2024 to USD 5,036.0 million by 2032, exhibiting a CAGR of 13.3% during the forecast period.

India Anime Market Segmentation

T.V., Movie

Video, Internet Distribution, Merchandising
Music, Live Entertainment

By Genre

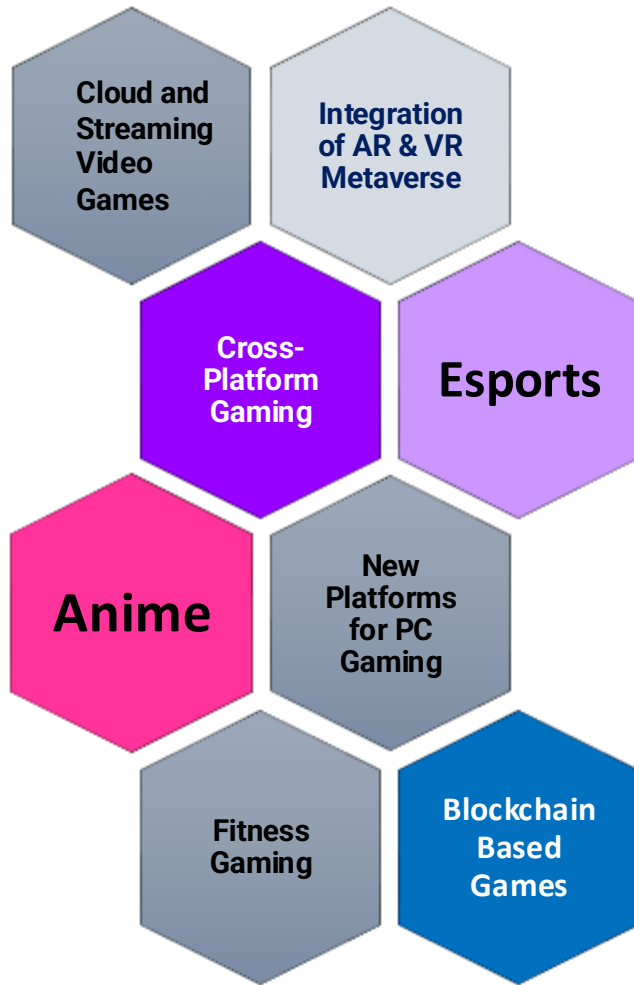
- Action & Adventure
- Sci-Fi & Fantasy
- Romance & Drama
- Sports
- Others

By Age Group

- Children
- Teenagers
- Young Adults



CURRENT TRENDS AND OPPORTUNITIES



The Global video game market will hit USD 583.69 billion by 2030.

The Indian amine industry is anticipated to grow from USD 1,855.4 million in 2024 to USD 5,036.0 million by 2032

The AR and VR video game market will hit \$ 11.0 billion by 2026. The growth follows an 18.5% CAGR from 2021 to 2026.

AR fitness is also becoming increasingly popular as a fun and engaging way to stay fit

Developing games that can be played using multiple systems and consoles. Cross-platform gaming has been gaining popularity in recent years, and it is likely that this trend will continue into 2023 and beyond

Esports turning into a global phenomenon and the rapid popularity of games like PUBG Mobile, Multiplayer mobile games have proved themselves a prominent gaming trend

The PC gaming market worldwide will touch \$31.52 Billion by 2028.

The metaverse video game market will reach 710.21 billion by 2027

EMERGING TRENDS

- Edutainment experiences that blend learning with fun
- Themed environments based on famous Indian mythological stories or Bollywood
- Sustainability-focused attractions and eco-friendly practices
- Multi-generational activities that appeal to extended families
- Integration of traditional Indian games with modern technology
- Different eras of Indian history using AR/VR, interactive exhibits, and themed games.
- Anime is new genre, Industry is exploring





Confederation of Indian Industry

iDGS
INDIAN DIGITAL GAMING SOCIETY

INTRODUCTION



INDIAN DIGITAL GAMING SOCIETY (IDGS)

Vision

"Catalyse the Indian Digital Gaming Industry to effectively contribute to India's economic growth and become a trustworthy Global partner"

Scope



Policy
Advocacy



New Tech
Introduction



Export
Promotion



Innovation &
Indigenization



Market
Research



Skill
Development

Ecosystem

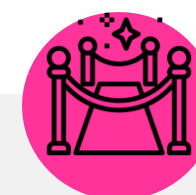


Stakeholders

- E-sports Participant
- Game Studios & Developers
- Gaming Service Providers
- Publishers
- Investors
- Academia
- Hardware & New Tech
- Members



Members



Major Events

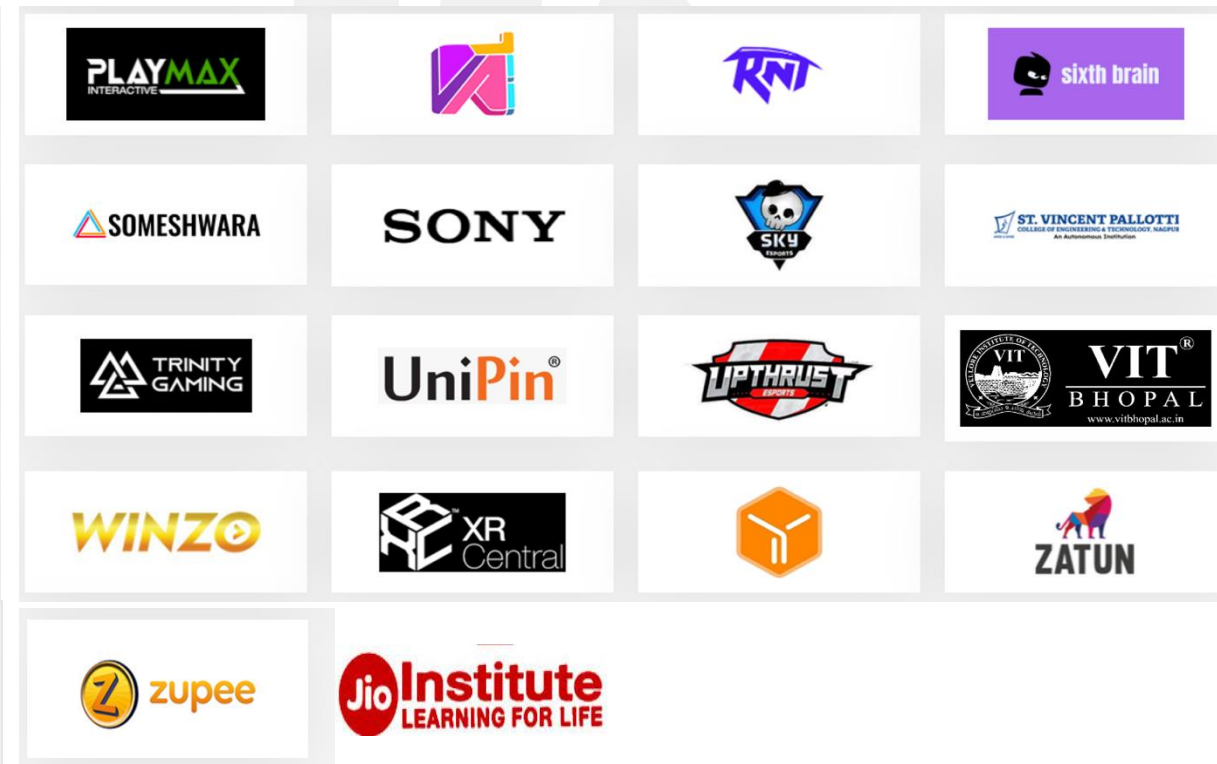
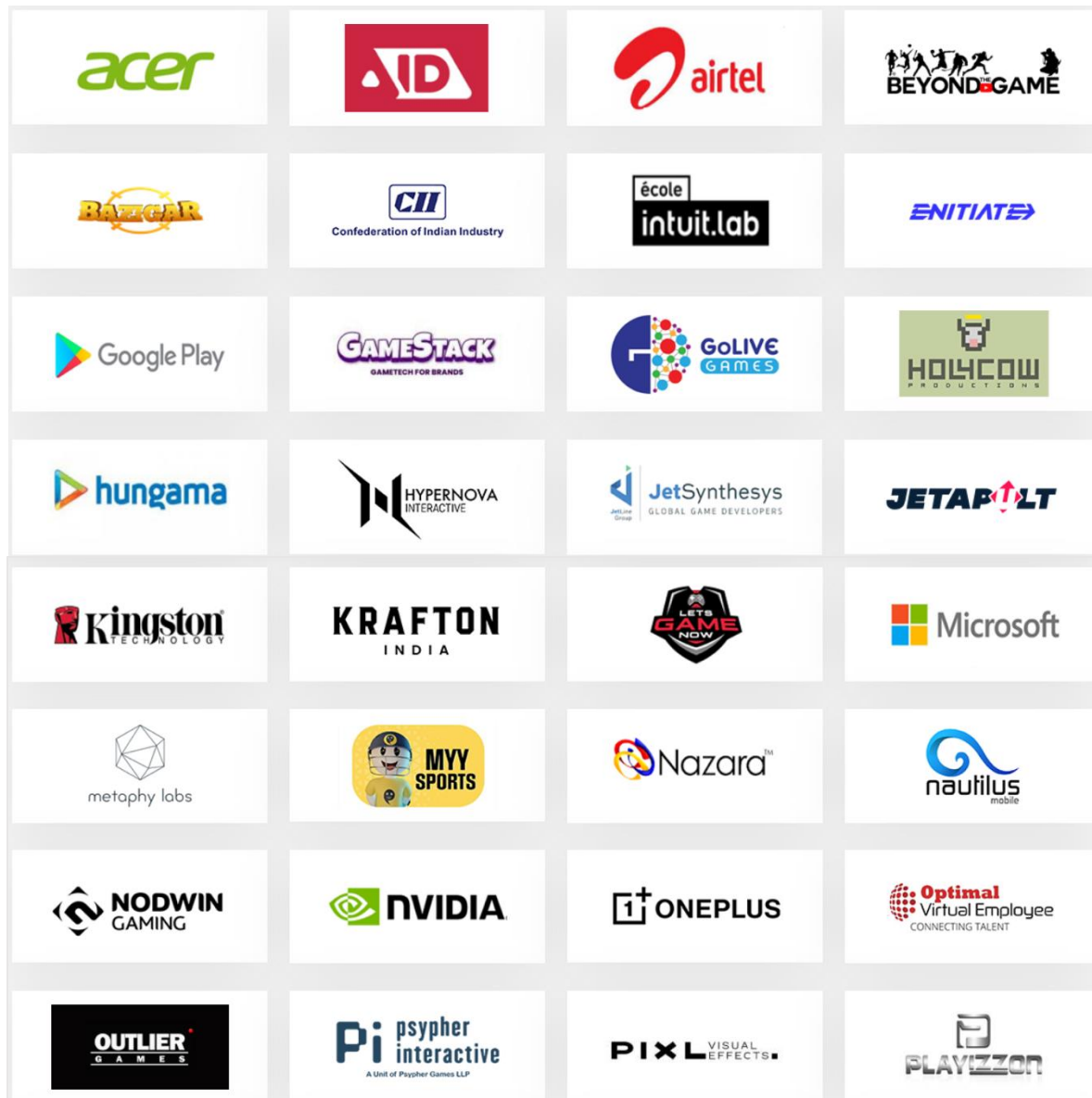


Three-day annual event



Multi-city 1 day event





Members belongs to Publisher, Distributors, Hardware (laptop, PC and Console), Game Developers, and Esports Tournament Organisers, and Academia





Confederation of Indian Industry



THANK YOU



www.gamingsociety.in