

ONLINE GAMBLING IN INDIA : 2020

TRENDS & OPPORTUNITY



THE WORLD HAS A NEW FAVOURITE PAST TIME

Bigger than Oscar



Music
\$19.1 Billion



Films
\$136 Billion



Gaming
\$152.1 Billion

Bigger than Google



Twitter
\$8



Facebook
\$20.1



Google
\$27



Tencent
\$59

INDIA IS NOT FAR BEHIND..

Gambling is as old as civilization and India being world's earliest civilizations, it is no surprise that Indians love to Gamble!

80%

of Indians gamble at-least once a year.

Be it sports, slots or casino tables
(Source: [Gambling.com](https://www.gambling.com))





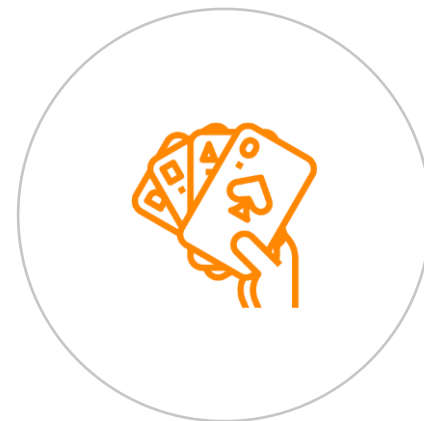
GAMBLING IN INDIA **CURRENT LANDSCAPE**

POPULAR FORMS OF GAMBLING

Games of “mere skill”



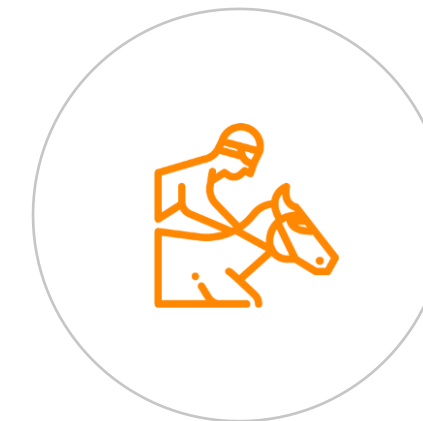
Rummy



Poker



Fantasy
Sports



Horse
Racing

Games of “chance”



Casino



Bingo



Roulette

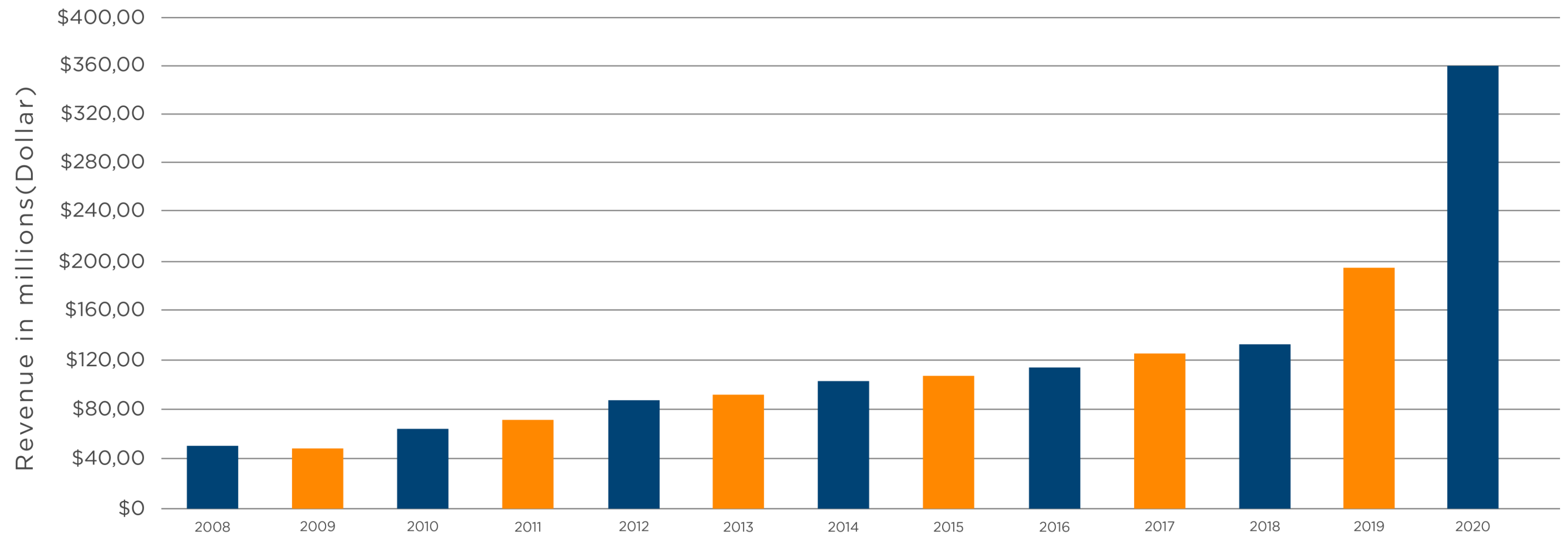


Slots



Lotteries

INDIA'S REAL MONEY GAMING INDUSTRY



MARKET SIZE

- India's real money gaming industry has been pegged at 360 million USD
- Growth rate of 20% per annum
- Expected to be a \$1 Billion industry by 2021

Source: Casinowebsites.in

KEY OPERATORS



PROFILING THE INDIAN GAMER



AN AVERAGE INDIAN ONLINE GAMER



Is below **24 Years**

Gen Z (Under 21 Years) & Millennials (22 – 37 Years) constitute **90%** of target audience.



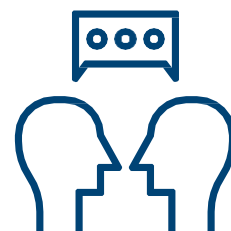
Is **Male**

83% of Online Gamers are Male



Prefers to **Play on Mobile**

88% of Online Gamers prefer to play on Mobile



Plays for **Recreation & Social Interaction**

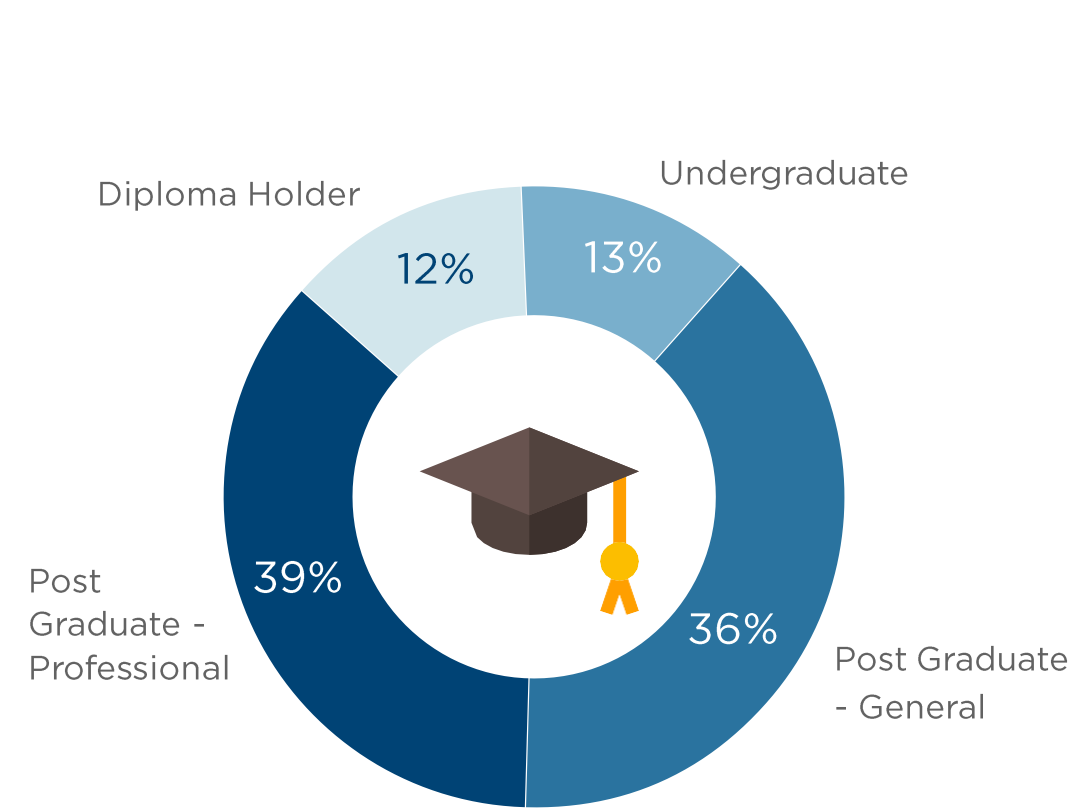
Winning is not the only goal



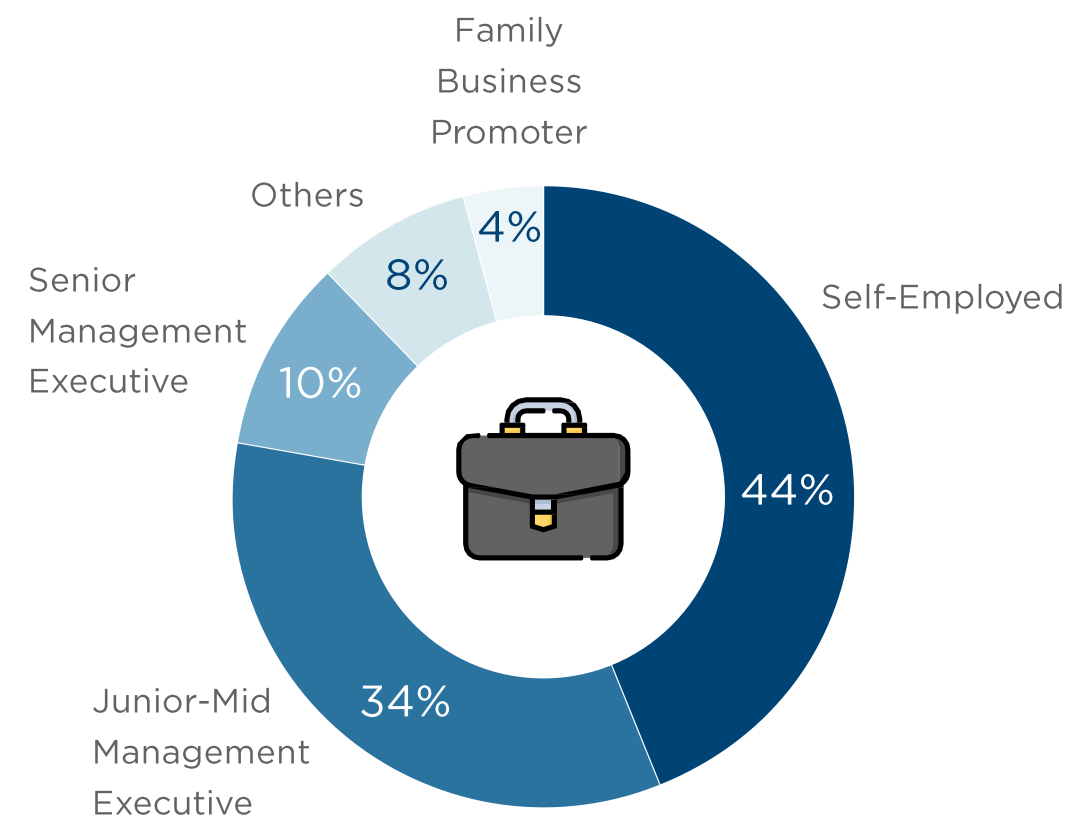
Is well **Educated**

75% of Online Gamers are graduate

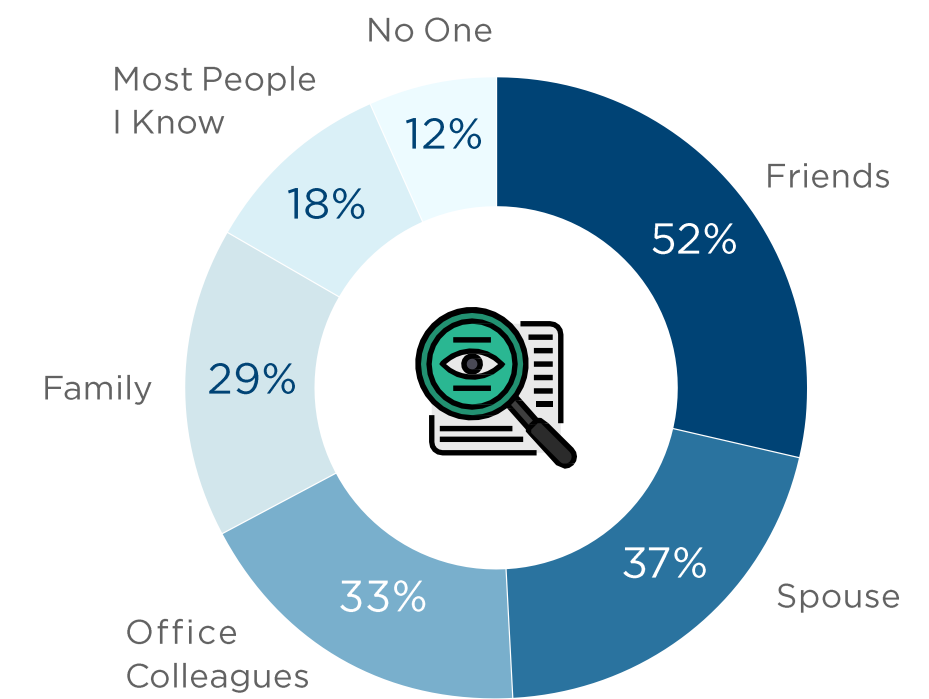
DETAILED DEMOGRAPHICS



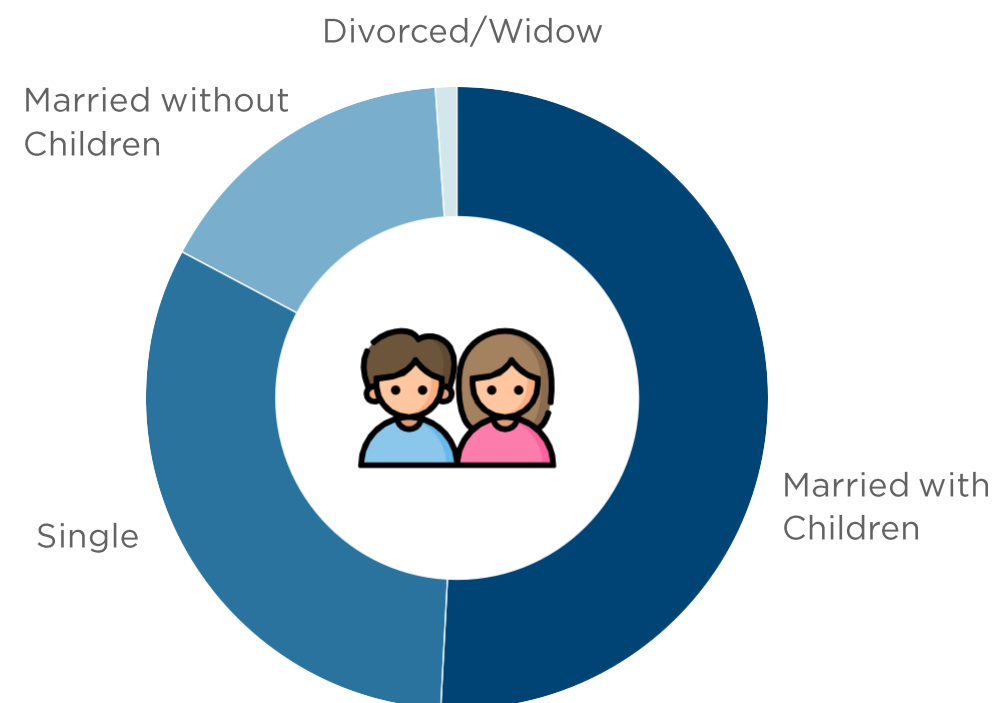
Educational Statistics



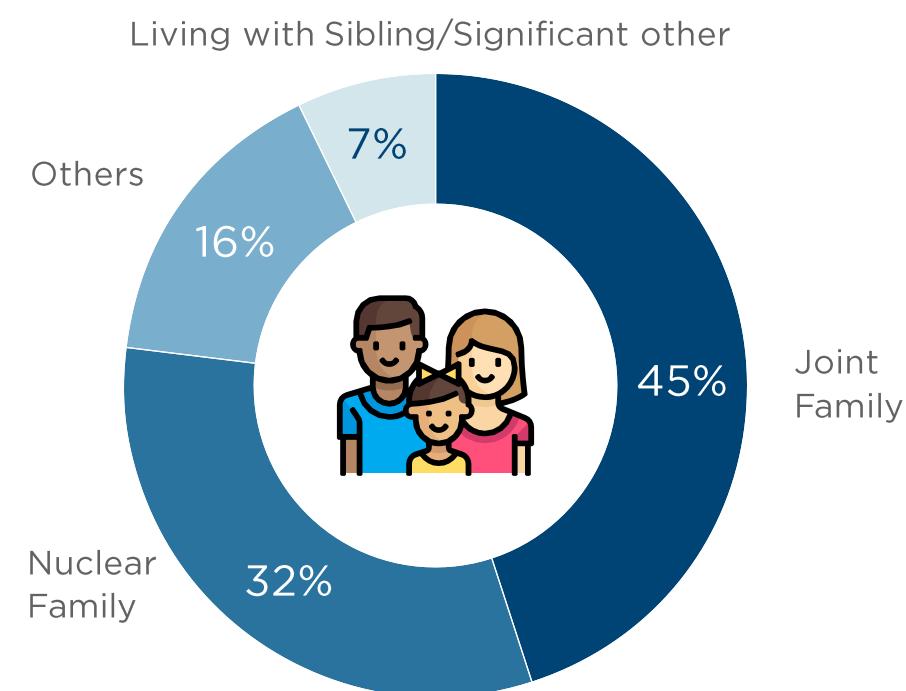
Occupational Statistics



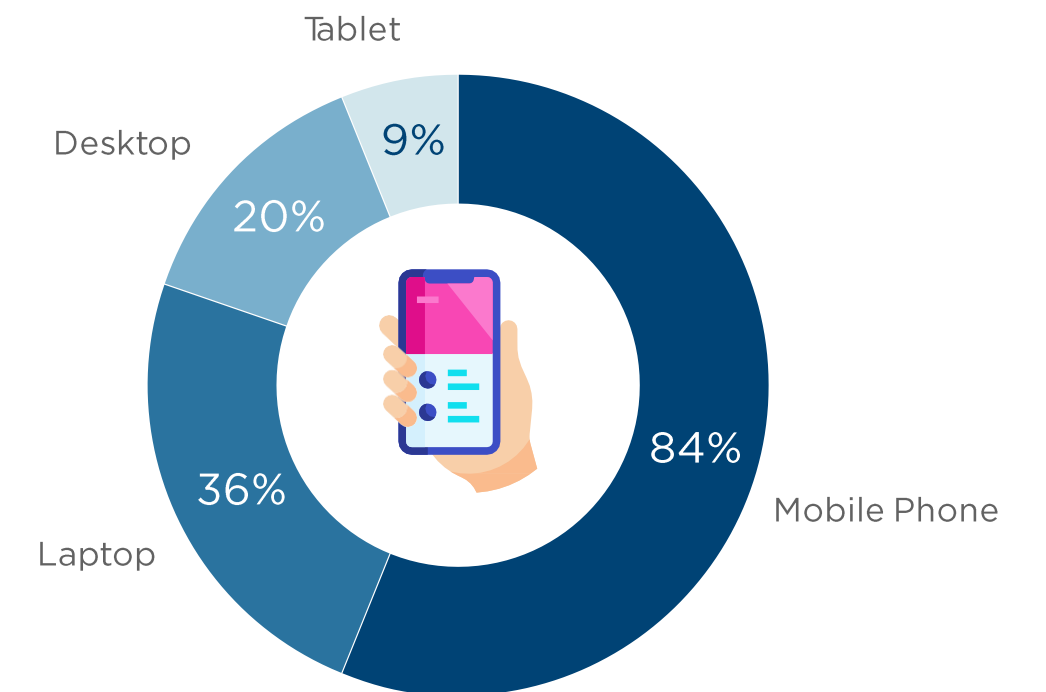
Transparency about Online Games



Relationship Status



Family Status



Device Usage

WHY INDIANS LOVE TO GAME

Analysis of need states identified the following:

20%

Gainful
Entertainment



36%

Connection



34%

Relief



10%

Dominance



GAMBLING IN INDIA : 2020

50% OF MID & BIG SIZE GAMING COMPANIES
ARE SETTING UP OFFICES IN INDIA IN 2020.

ARE YOU?



INDIA 2020: KEY DRIVERS FOR GROWTH

RISE OF
ONLINE
GAMERS

530_{MN}

RISE IN
DISPOSABLE
INCOME

50%+

RISE IN
SMARTPHONE
USERS

800_{MN}

E-KYC (AADHAR POWERED)
DIGITAL PAYMENT
WALLETS

300_{MN}

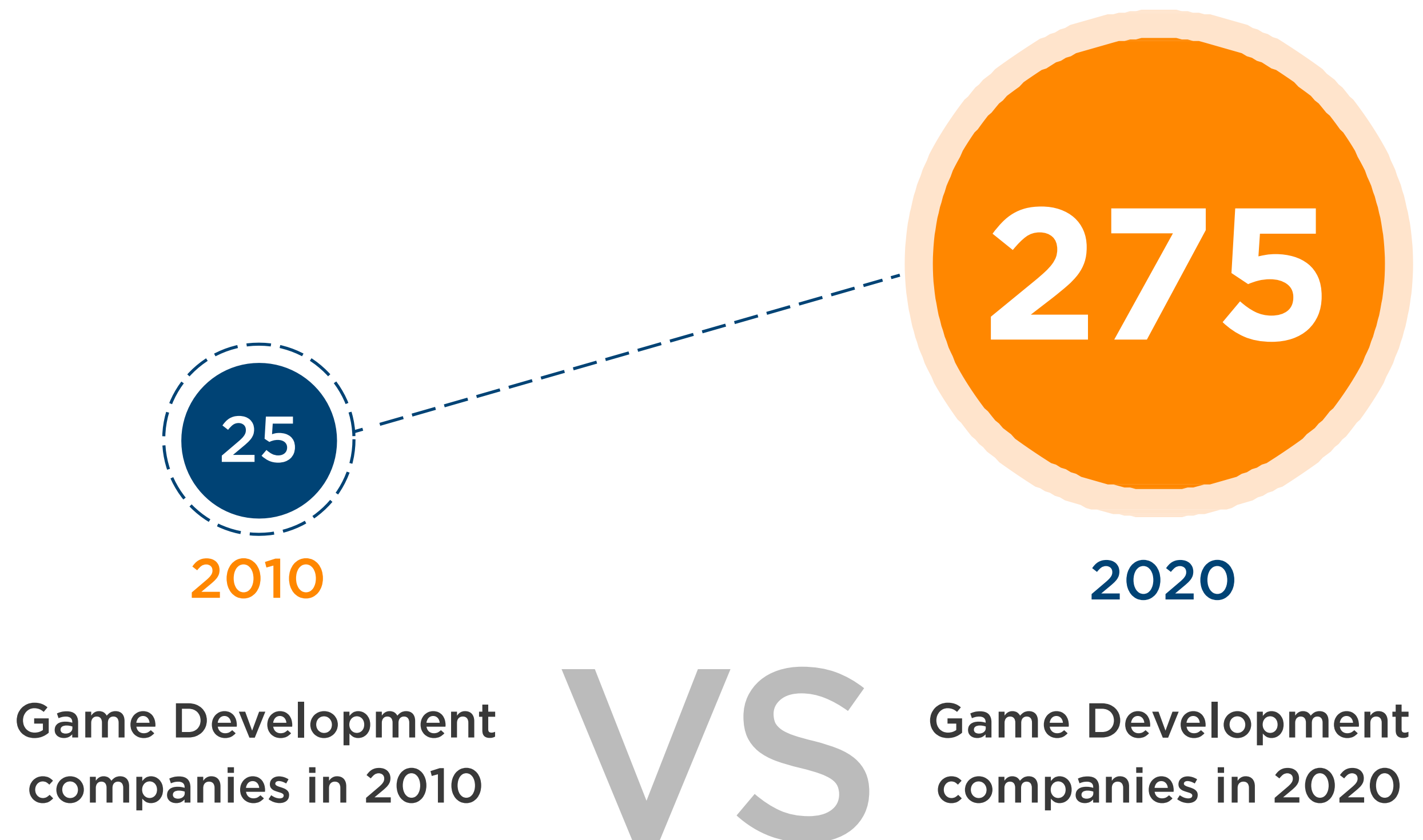
RISE IN
INTERNET
PENETRATION

750_{MN}

DIGITAL PAYMENT
TRANSACTION
VOLUME

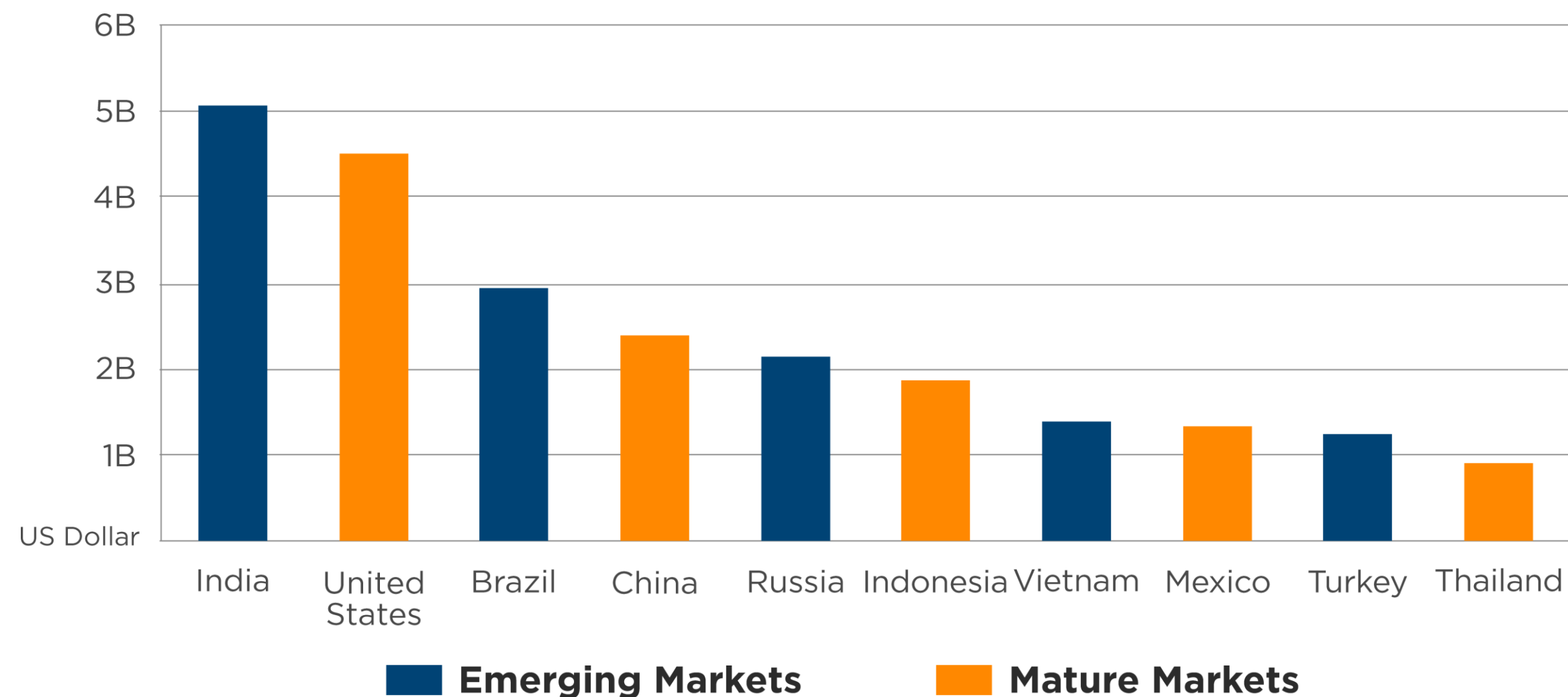
\$30_{BN}

ENTRY OF NEW GAME DEVELOPMENT COMPANIES



INDIA LEADS GAME DOWNLOADS GLOBALLY

iOS & Google Play as Per 2018 Report



Indian gaming market is competitive

- Cost of user Acquisition will continue to rise
- Need for higher marketing spends

However, higher player value & rise in gamers population make it lucrative

3 INDIAN GAMING COMPANIES GOING GLOBAL IN 2020

Consolidation in FRP Space. 2-3 major acquisitions expected in 2020



- To Invest \$20 million in gaming startups by 2020
- Buys majority of stakes in sportskeeda to sharpen focus on sports content.



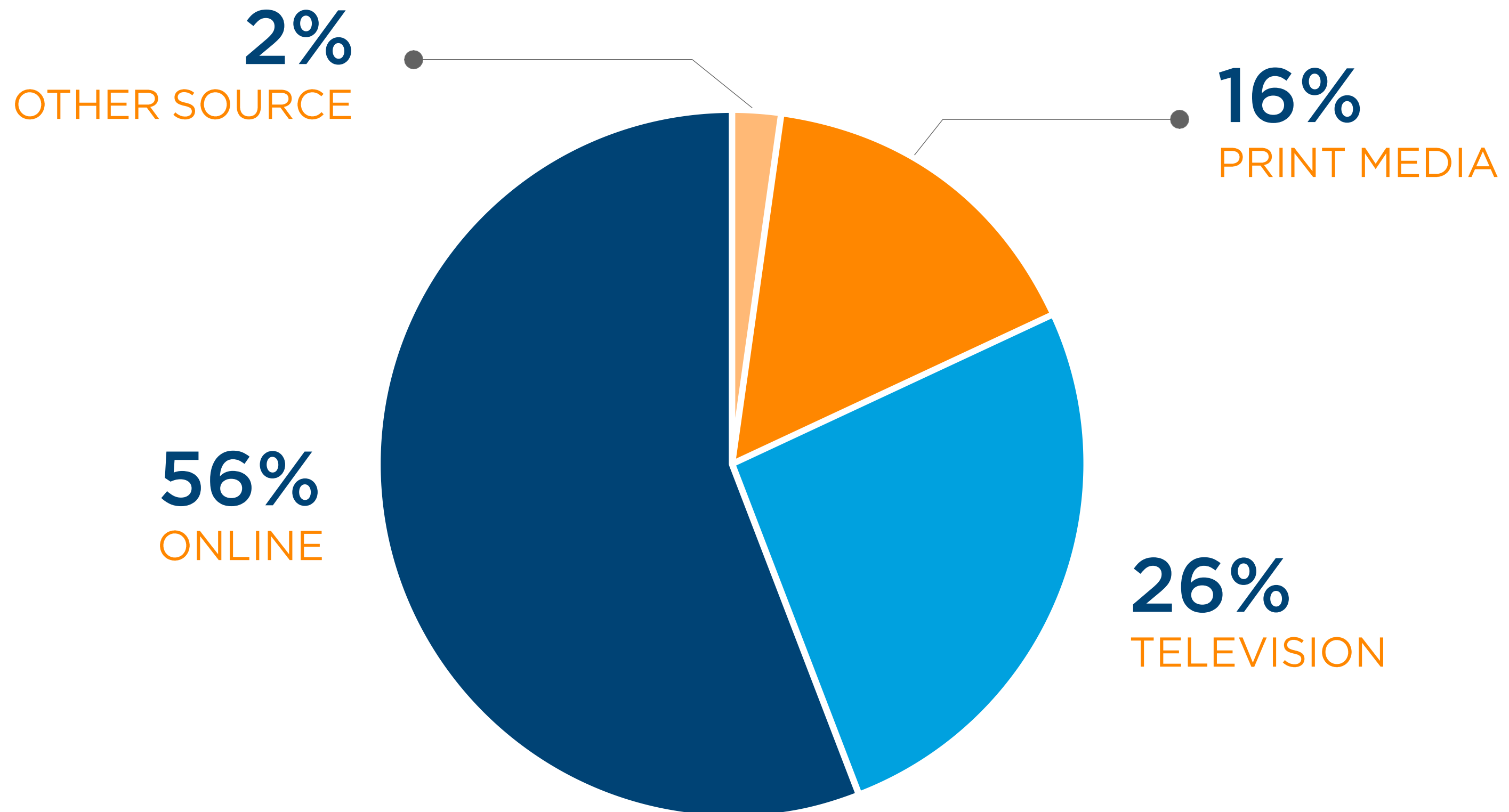
- Dream11 becomes fastest growing unicorn
- To hit 100 million user mark with a growth rate of 300X in 2020



- Acquired Adda52.com, India's leading online poker site
- Launched land-based casinos in Sikkim & Goa

YOUNG INDIA GETS THEIR NEWS ONLINE

% Of indians under 35 years who get news online



LOW INFLATION GLOBALLY & IN INDIA

But India's inflation still high vs Global levels

Inflation

India's ranking

India at
#161
in the world



2010

India still at
#145
in the world

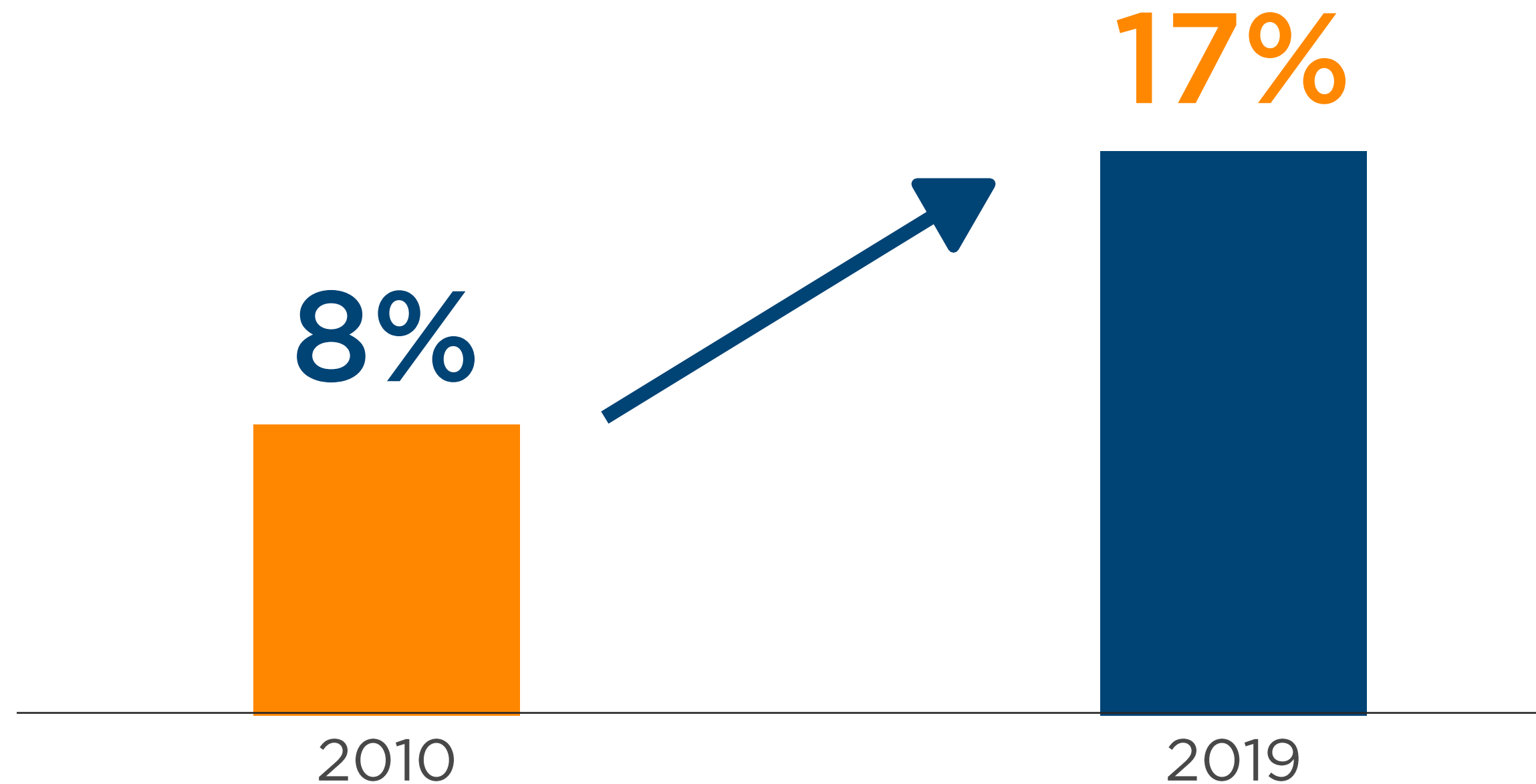


2019

Note : Out of 190 Countries

INDIA: RISE OF LOCAL NATURAL PRODUCTS

% Market share of local brands

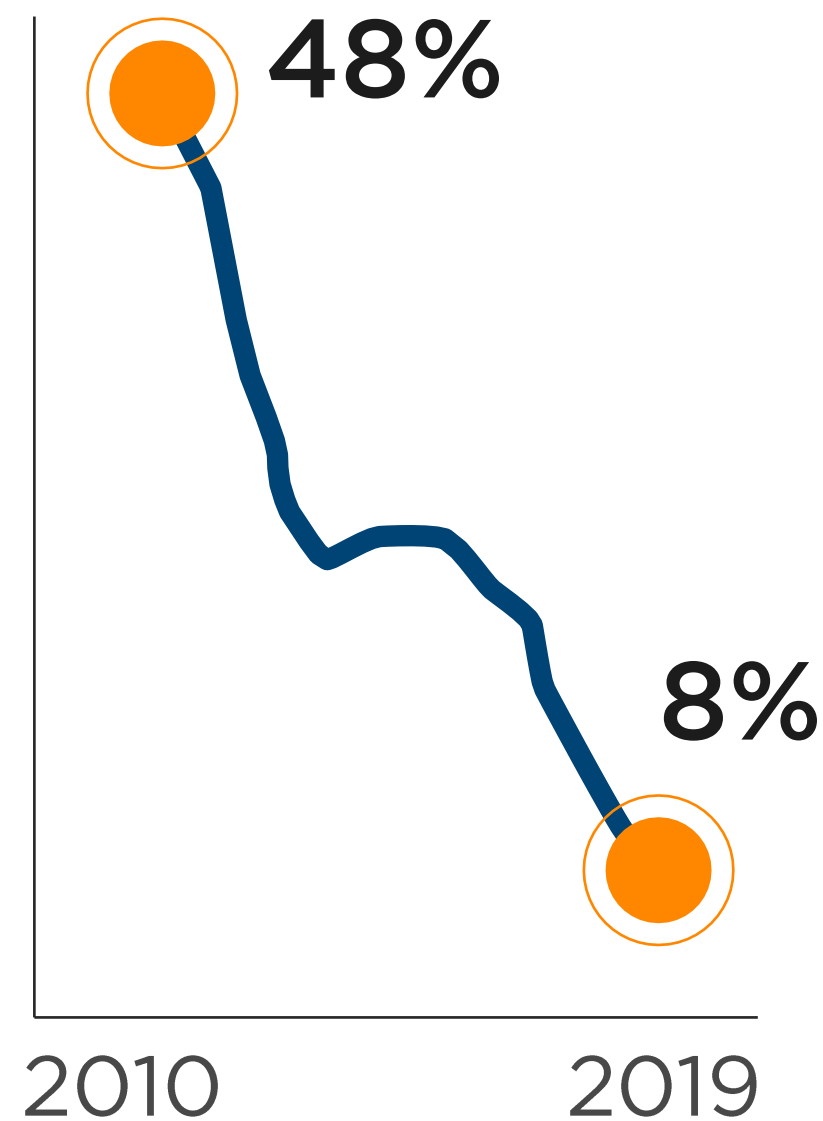


Source : Credit suisse (Simple average of toothpaste, shampoo, skin care)

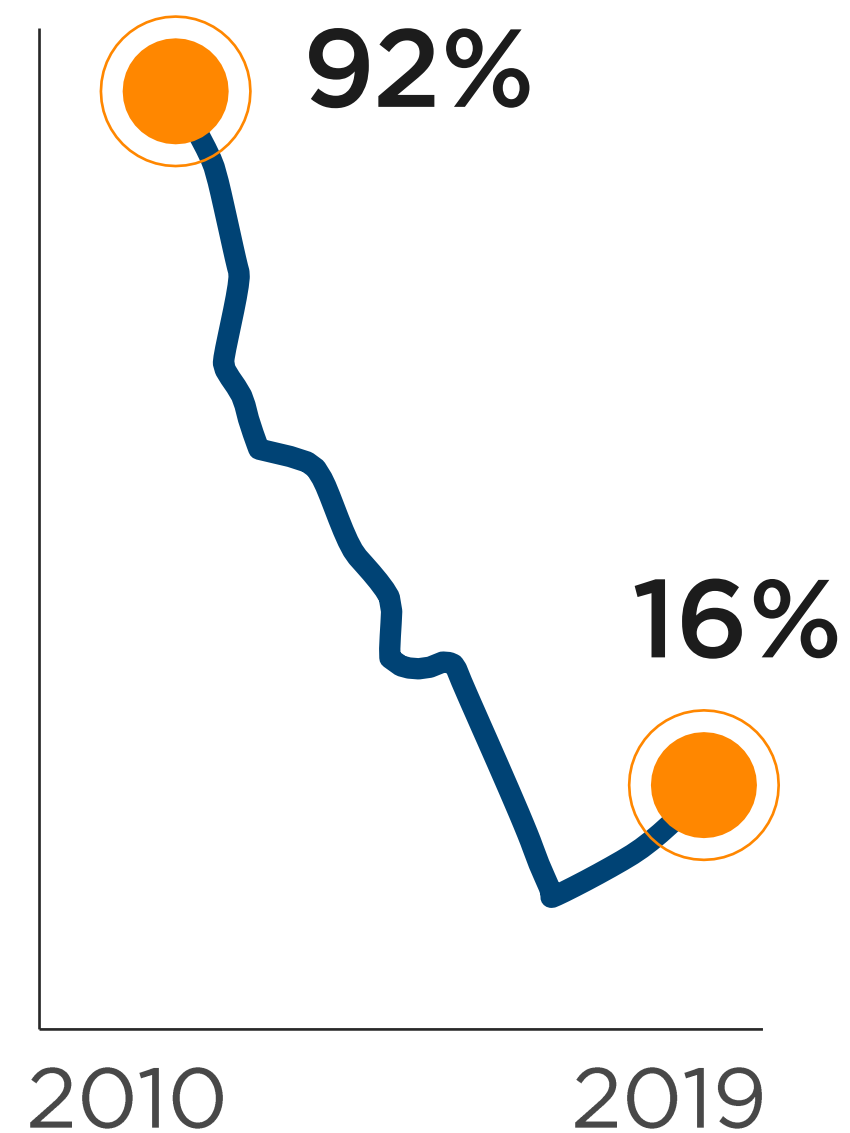
BIG TECH SLOWING DOWN

Growth rates dropping

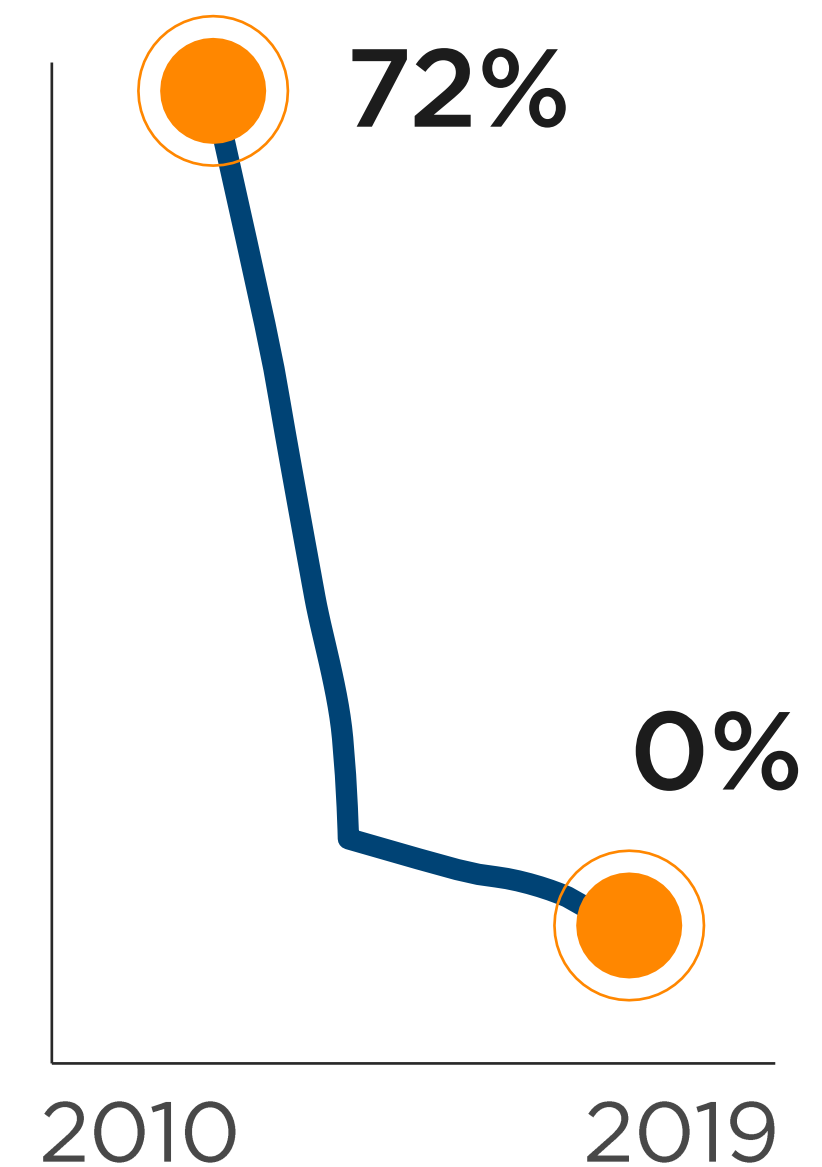
FACEBOOK



SNAPCHAT



TWITTER



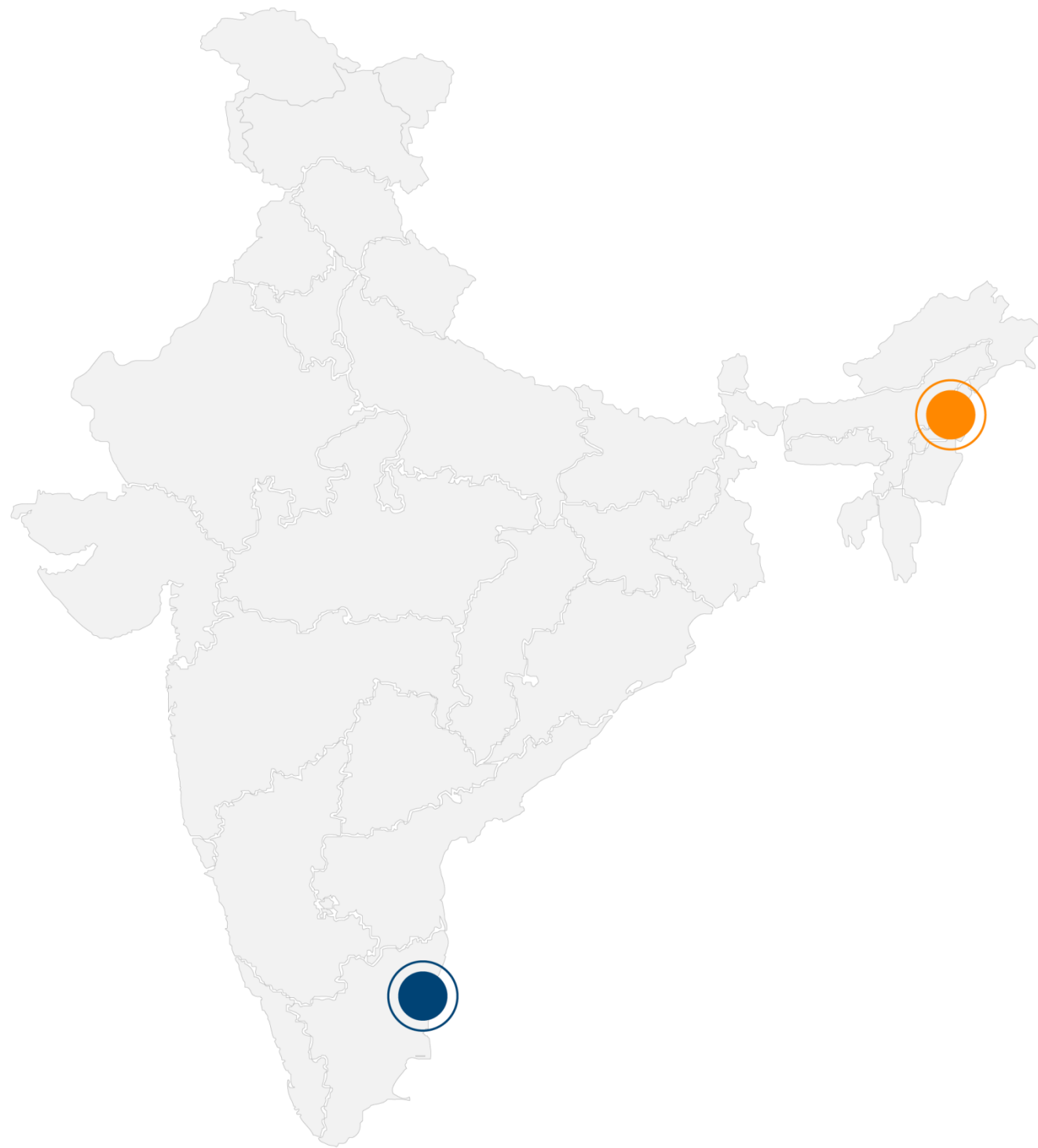
INDIA TO BECOME A SIZEABLE GAMING MARKET IN 2020

The **global gambling** industry is estimated to reach **500 Billion US Dollars** this year

India is nowhere behind
estimated to be worth
60 Billion US Dollars



2020 SOCIO-POLITICAL LANDSCAPE FAVOURS GAMING



■ **Online Games of Skill** legal in Nagaland since 2016

■ **Puducherry** on path to Legalise Casinos

Rise in family acceptance
for gambling in India

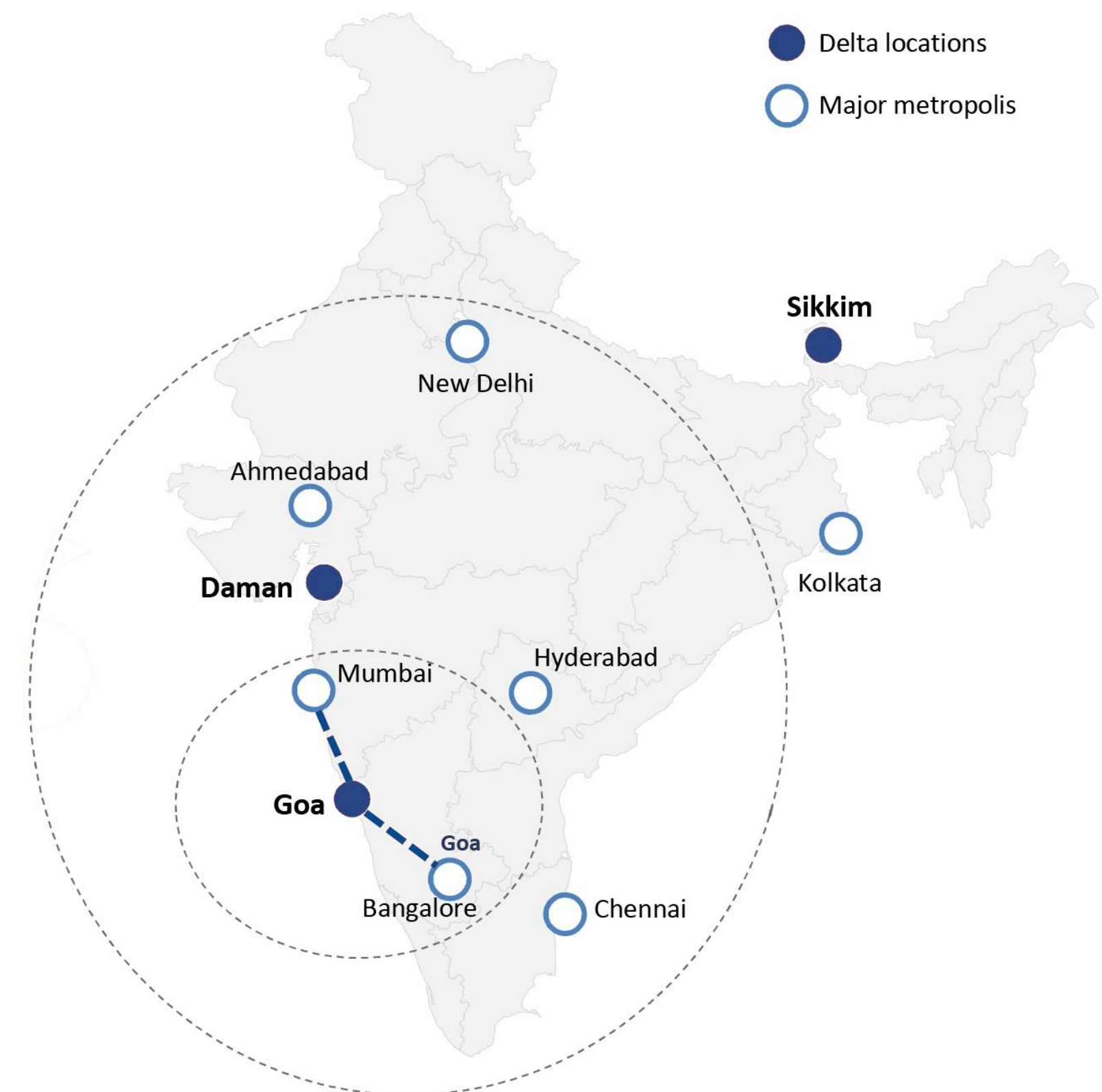
RISE OF OFFLINE CASINOS IN 2020 : SPREADHEAD BY DELTIN

GOA

- Casino Pride Panaji
- Casino Pride 2
- Chances Resort & Casino - Goa
- Casino Paradise at Neo Majestic
- Goa Nugget Casino

SIKKIM

- Deltin Denzong Casino
- Casino Sikkim at Hotel Royal Plaza



HOW TO WIN THE INDIAN MARKET IN 2020



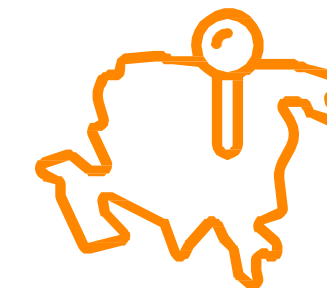
Need to Localize Content

South India is more prone to gamble than north



User Experience

Focus on player experience



Region Specific

Provide region specific choice of games



Small Ticket Fee

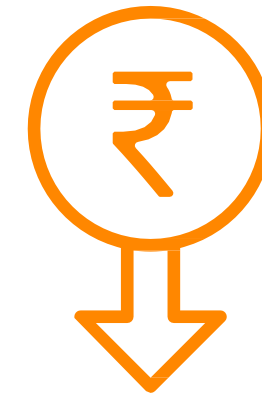
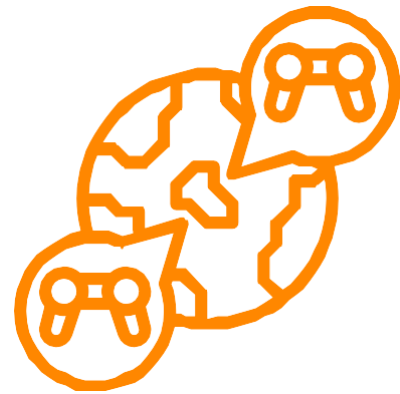
Rural youth is receptive to online gambling, target them with a Rs 99 entry fee



Emotional & Social Connect

Connect on an emotional level with the young Indians – Provide visible social commitments as a company

CHOICE OF GAMES



LOCAL/REGIONAL SPECIFIC

EMOTIONAL APPROACH

SMALL MIN.
TICKET GAME (INR 100)



LUXURY GAME

BIGGER TICKET (INR 3000)

The image shows the Gateway of India in Mumbai, India, a large archway monument. The monument is divided into two main sections by a diagonal line. The left section is bathed in a warm orange light, while the right section is bathed in a cool green light. The central archway is dark, creating a silhouette effect. The sky is a clear blue. The text 'GAME FOR INDIA?' is overlaid in white, bold, sans-serif font across the center of the image, with a thin white horizontal line underneath it.

GAME FOR INDIA?