



n•stra
IT HITS
DIFFERENT

Nostra Gaming Trends
Report 2023



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BIKASH CHOWDHURY

Chief Marketing Officer, Glance

“

Undoubtedly, the world of gaming is experiencing an exciting time. The rapid growth of technology has democratized gaming, making it more inclusive and accessible. We, at Nostra, are committed to creating a world-class gaming platform where every gamer finds what they love

”

FOREWORD

It's an exciting time for the gaming industry, globally!

The explosion in technology, the conquest of new surfaces and markets, and the unprecedented access to the internet have brought gamers across genders, life stages and regions together in extraordinary ways.

Gaming is no longer an elite, high-investment, clique activity – it's a low-stakes, high-expectations, challenging and inclusive pursuit.

These changes are propelling the industry forward and are leading to interesting expectations -

For gaming platforms, it's the pressure to enable better discovery.

For the gamer, playing a game is an interaction – one where you put a part of yourself out there and get something incredible in return.

For the game developer, making a game is a creative pursuit – but one that becomes truly meaningful only when it reaches the right gamer.

In the face of unparalleled variety and choice, one of the common pain points is – matching the right game with the right gamer.

Nostra, from Glance, the largest mobile gaming platform in India and Southeast Asia, solves this.

With a range of experiences, at the point of the lock screen, Nostra has something for every gamer. With an easy three-step integration process that lands access to 90 Mn gamers across India and Indonesia, infinite game trials, and a near-perfect feedback loop – the developers need to look no further than the Nostra lock screen gaming solution.

The result? A win-win for all. Users, developers and brands alike!

With its upcoming launches in Japan, US and LATAM, Nostra will spread its wing across continents.

This report brings to life the Nostra audience story and tells a tale of how it has leveraged its presence on the Lock screen to become one of the most-loved mobile gaming destinations across the globe.

Come, experience the Nostra story with us!



MOBILE GAMING IS
HERE TO STAY

GAMING: THE SEARCH FOR A HOLISTIC, IMMERSIVE EXPERIENCE

Gaming is no longer an elite, clique activity – it's a low-stakes, high-expectations, challenging and inclusive pursuit.

For the average gamer from the APAC region, there is more than one reason to actively seek the world of online gaming:

- **Aspiration**
- **Entertainment**
- **Escape**
- **Competition**
- **Socialization**
- **Relaxation**
- **Flexing the brain**

100%

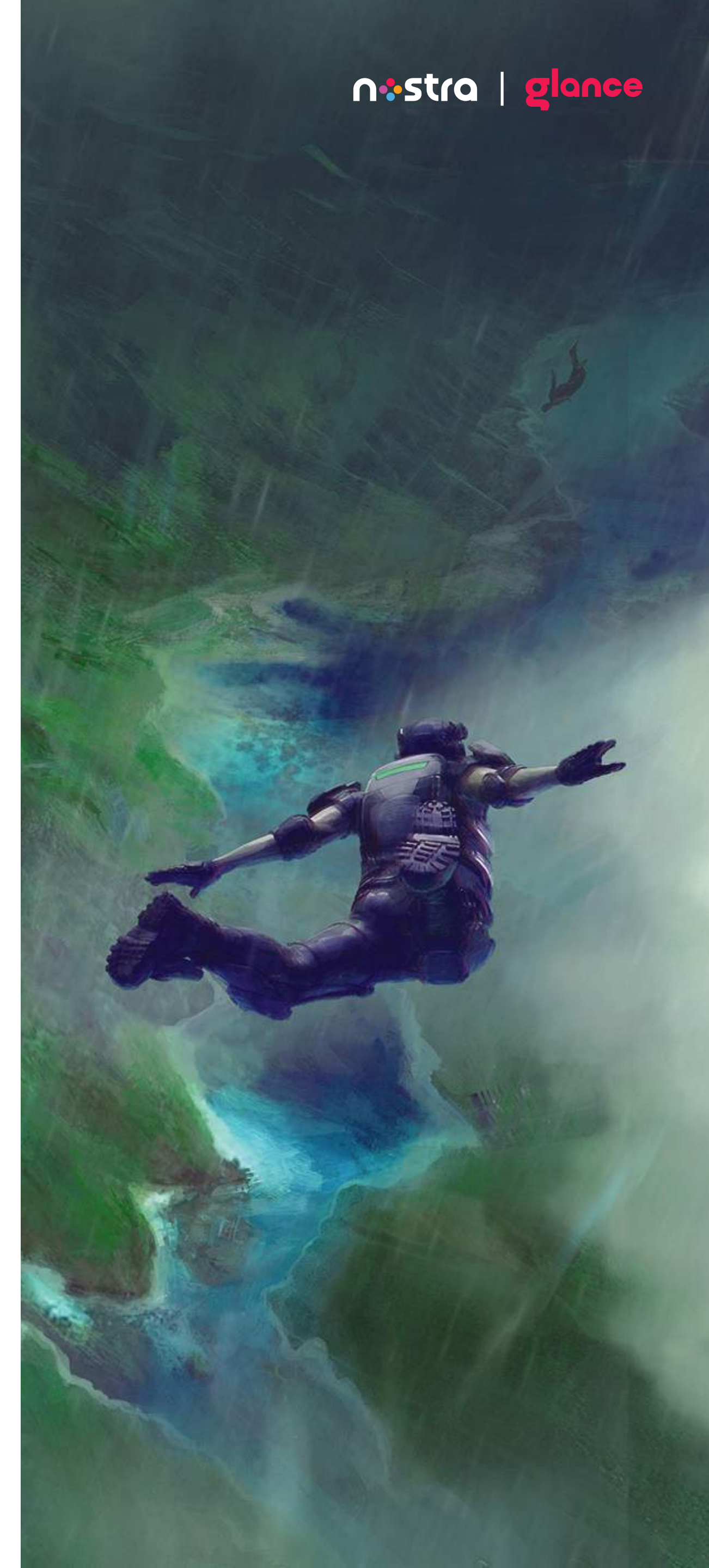
Growth in searches for
"best mobile games"
since 2022

Games have the power to educate, connect, and even liberate us from the boxes we've put ourselves in.

But the real questions are:

How can a user discover games that are a perfect fit for their preferences?

How can developers deliver their roster of games to this growing pool of gamers?





ENTER OURS TRULY: NOSTRA!

Nostra, the only gaming platform that lives on the smartphone lock screen, embodies the meaning of its name in all senses.

Apart from the variety of gaming content/experiences with shared content and experience zone on the smartphone what really drives the users to the platform?

No Unlock 

No Search 

No Logins 

Play without
download option 

DISCOVERY, MADE EASY

Right on the lock screen!

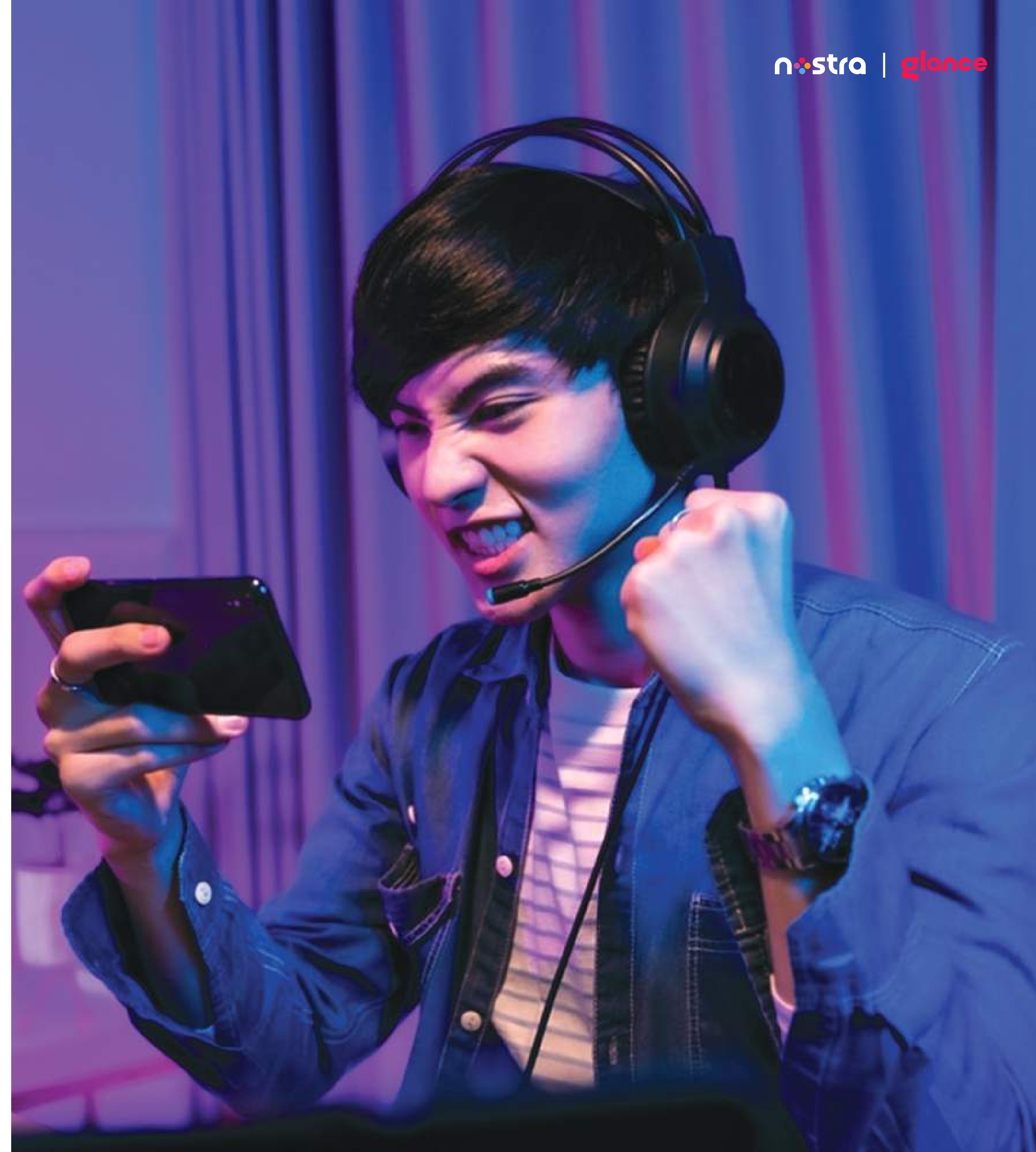
CAPTIVATING TWO DIVERSE GEOGRAPHIES...

Nostra, the gaming platform on the smartphone lock screen, originated in India in 2019. Expanding to various markets in 2022, it has become the go-to gaming destination for all users

90 Mn+
MAU

1.6x
Growth in
DAU

20
Minutes average
time spent per
user daily



WITH A WIDE RANGE OF EXPERIENCES

500+ instant games, 15+ categories

A new game everyday

Personalized recommendations

Games curated for your interest and stay up to date with your favourite games

One platform, multiple formats

Online, offline

Active community of gamers

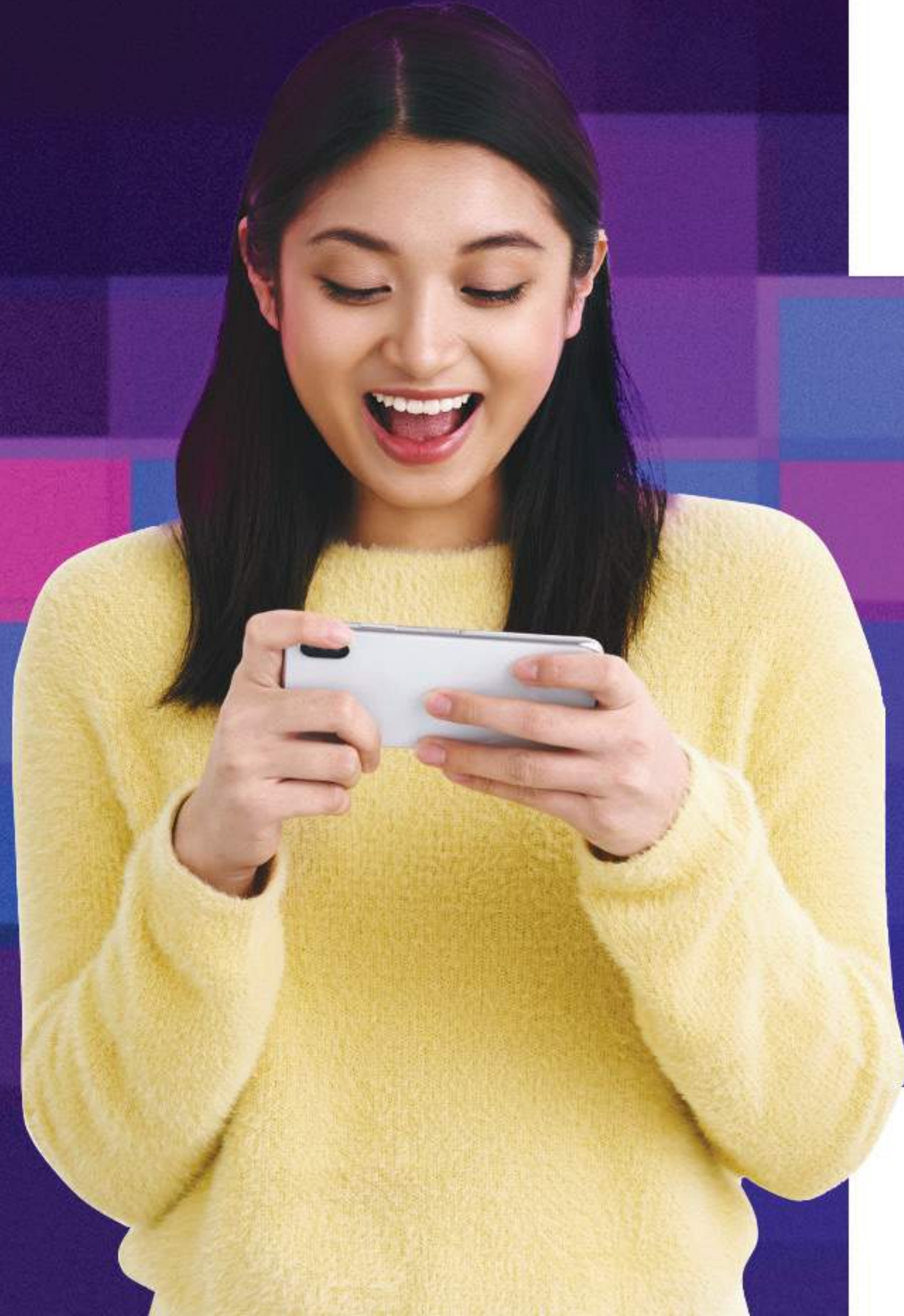
Connect with millions of players on discussion forums

Tournaments, Live Streams

Compete for the top spot across leaderboards, watch and learn from skilled gamers around the world

NOSTRA CATEGORIES SHARE





NOSTRA INDIA:
LOCKED AND
LOADED



NOSTRA INDIA: LEADING THE MOBILE-FIRST GAMING INDUSTRY

Home to over 430 million mobile gamers – a number that is expected to grow to 650 million by 2025. India is among the fastest growing mobile gaming markets.

The Glance Lock Screen, boasting over 200 million active users in India, serves as a haven for more than 82 million gamers seeking an escape into the world of Nostra.

82 Mn
Monthly
active users

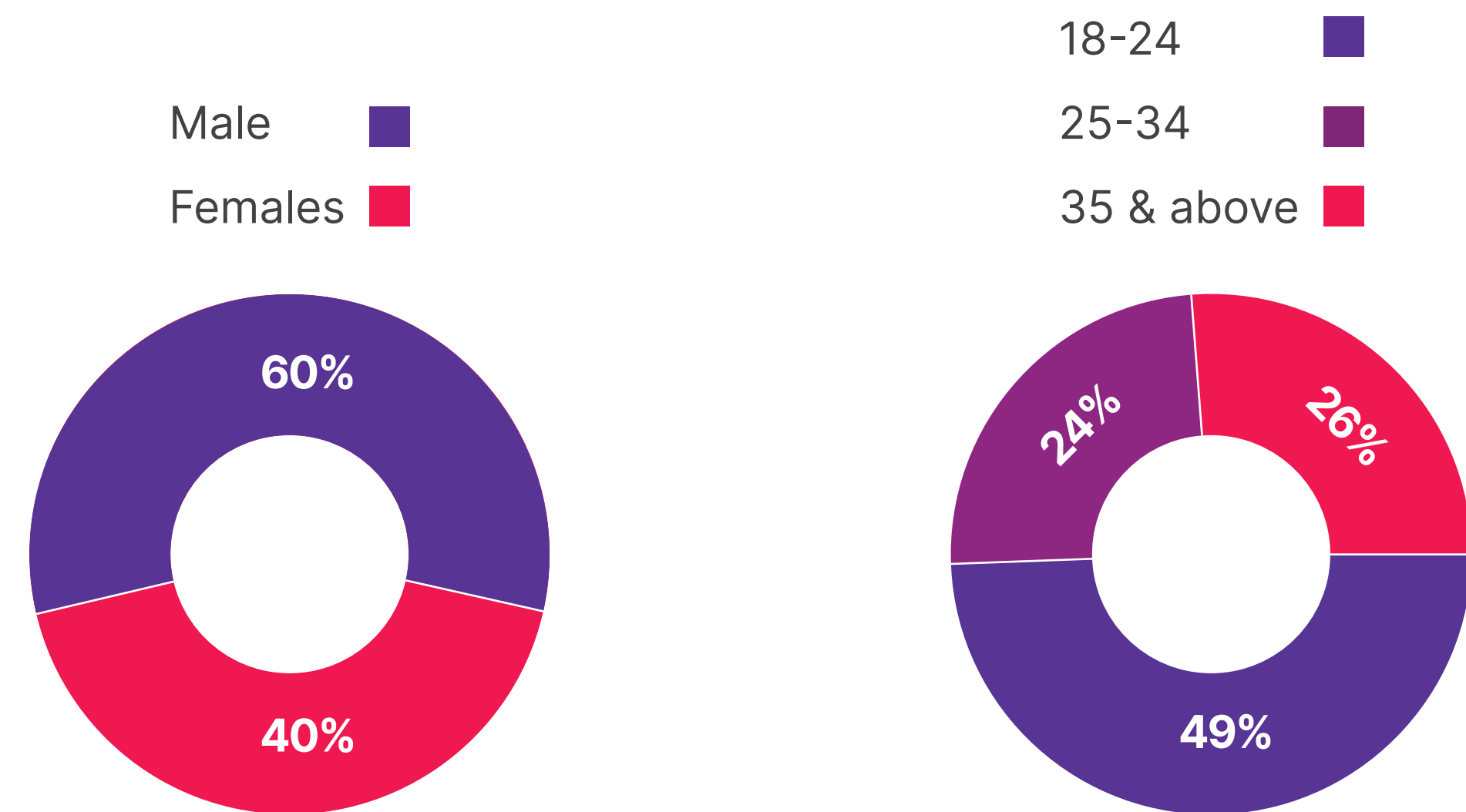
1.7x
Growth
in DAU

1.3x
Growth in
MAU

1.5x
Growth in no. of
games played per
session

AND RIDING THIS HIGH, EVERY CORNER OF INDIA IS PLUGGED INTO NOSTRA

Men and women, young and old, across Nostra, speak a common language - Games!

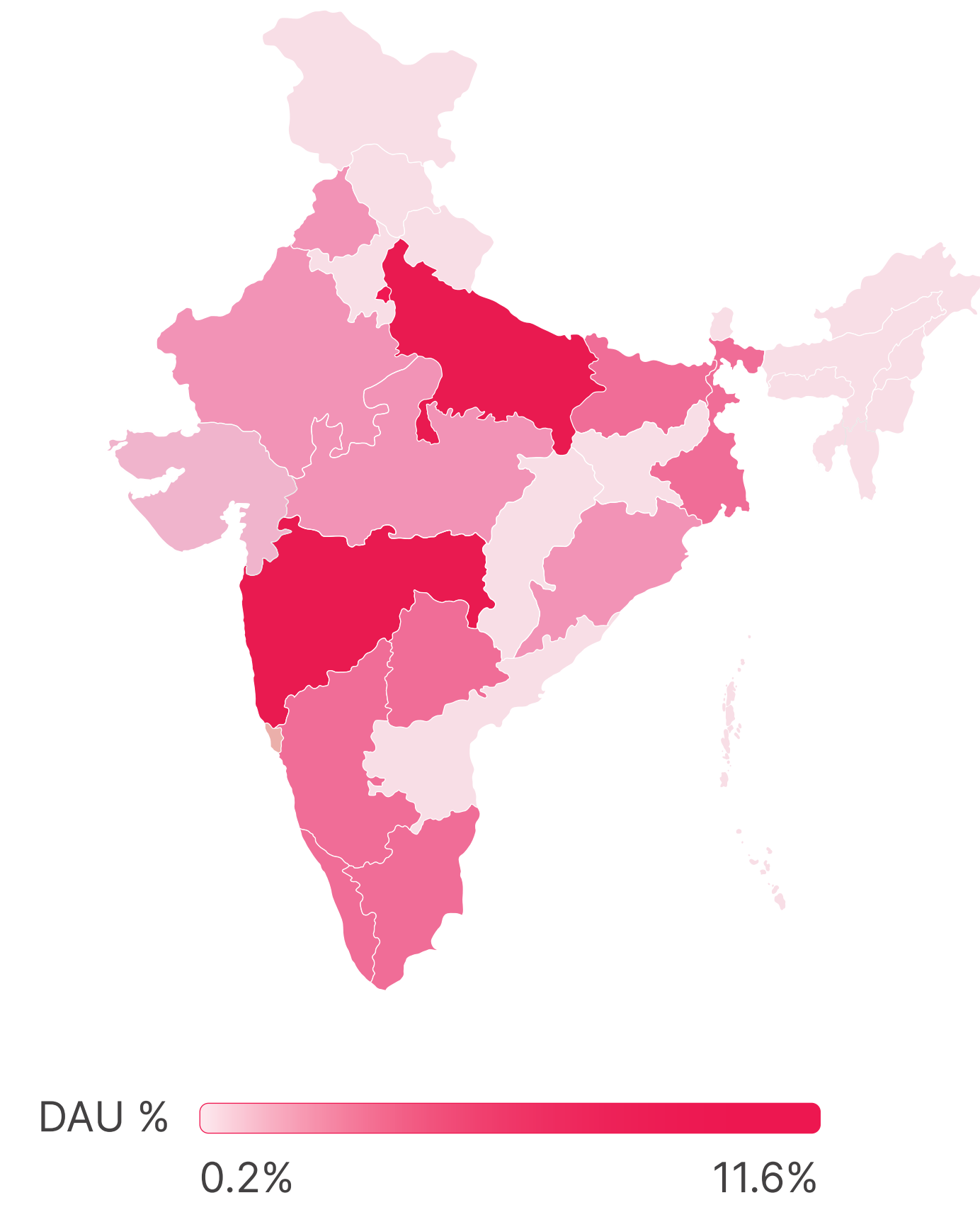


NOSTRA CONSUMERS, GENDER COMPOSITION

NOSTRA CONSUMERS, AGE COMPOSITION

Source: Nostra consumers quarterly track

DISTRIBUTION OF DAILY ACTIVE USERS ACROSS STATES, JUNE 2023



NOSTRA'S APPEAL: GAMERS ALWAYS ENGAGED, EVERY MINUTE COUNTS!

Peak play hits noon and late evenings

Sessions skyrocket by 1.7X, go off the charts during weekends

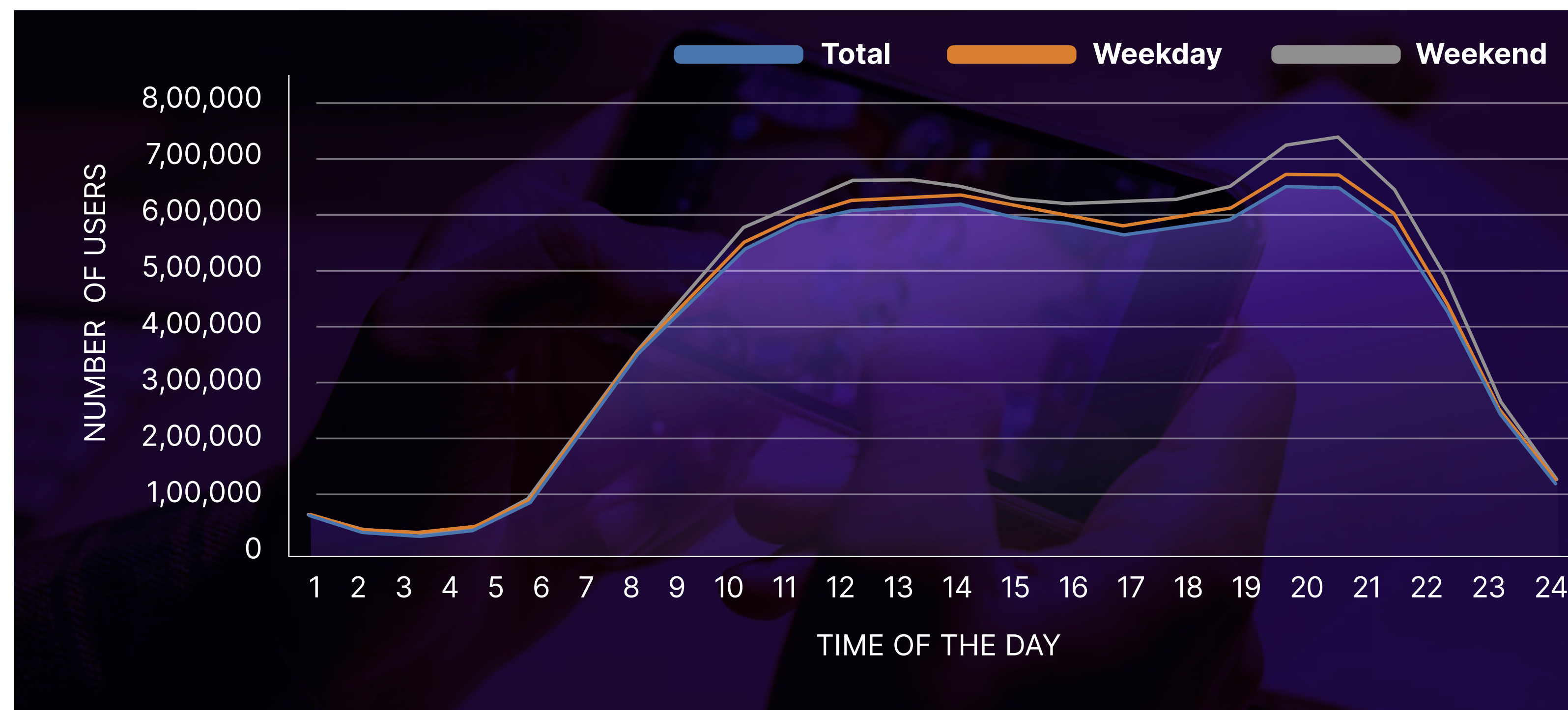
Nostra's winning trio:

38% Ideal gaming platform to spend time

26% Simple to navigate and enjoy

24% Fascinating variety of gaming experiences

NOSTRA CONSUMPTION BY TIME OF THE DAY



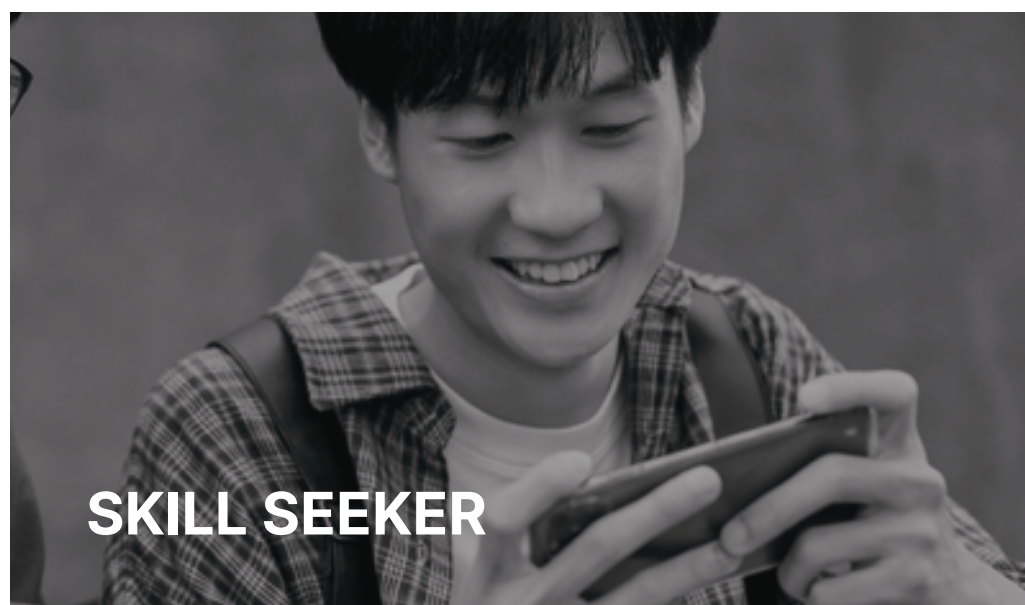
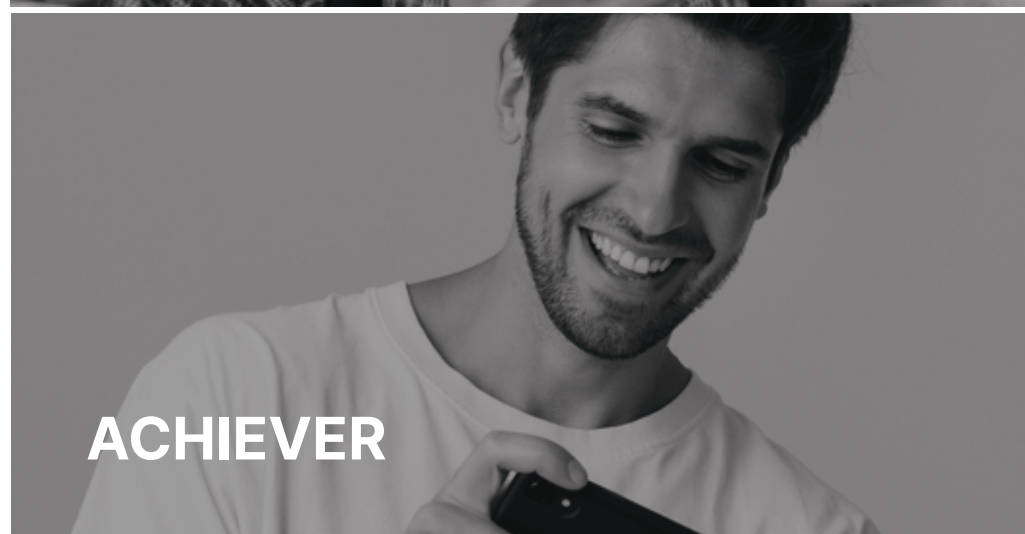
THREE VITAL PERSONAS WHO ENLIVEN THE NOSTRA GALAXY

3 KEY NOSTRA PERSONAS

WHO ARE THEY?

THEIR PREFERRED CATEGORIES

WHAT BRINGS THEM TO NOSTRA?

 <p>SKILL SEEKER</p>	<p>18 - 24 year-olds (52%) Men (66%)</p>	<p>Action, Endless Runner Puzzle, Strategy, Arcade</p>	<p>Live-streams - Learning from the best streamers; Newer games - sharpening skills; New games - a break from high- intensity gaming</p>
 <p>ACHIEVER</p>	<p>25 - 34 year-olds (55%)</p>	<p>Sports, Action, Puzzle, Strategy, Arcade</p>	<p>For the love of winning - Live Tournaments/multiplayer games For the thrill of competing - Creative leaderboards</p>
 <p>BRAINIAC</p>	<p>35 years & above (51%) Women (58%)</p>	<p>Board, Running/Racing, Puzzle/Arcade</p>	<p>For mental stimulation - variety of instant puzzle games For the no data breaks - offline games</p>

CRACKING THE PERSONA CODE

Skill seekers or consistent gamers are **driven by perfection**.

- Over 50% play several times a week
- Nearly 80% dedicate more than an hour to gaming every day

Achiever are driven by a passion to win and **overcome a challenge** whether it is a weekday or a weekend.

- More than 60% play several times a week
- Almost 70% spend more than an hour every day

Brainiacs single minded focus is to **stimulate their mind**. Every break they get is a quick gaming break.

- More than 65% play online games several times a week
- About 66% spend over an hour every day.



NOSTRA LIVE-STREAMS: FEEDING THE DRIVE TO UPSKILL

From BGMI to Heroes & Tanks to Candy Crush, there's a stream for almost all kinds of games on Nostra:

30
Daily
Streams

35
Streamers

3x
Increase In
Time Spent

If you are looking for some tips, tricks, or just interesting content, this is place to be.

Teach, learn and watch gaming with your people, in your own language.

NOSTRA GAMING WEEK: PUMPING UP E-SPORTS ENTHUSIASTS

Nostra Gaming Week offers an unparalleled opportunity for all gamers to embrace their true passion through immersive challenges open to everyone.

What better way to ignite their enthusiasm and dive headfirst into the excitement of these immersive experiences!

- An open-to-all e-sports gaming challenge
- Active from 12 PM to 10 PM
- For 7 consecutive days a month
- A prize pool of 1 lakh rupees

22 Mn
Views

815 K+
Total Watch
Hours

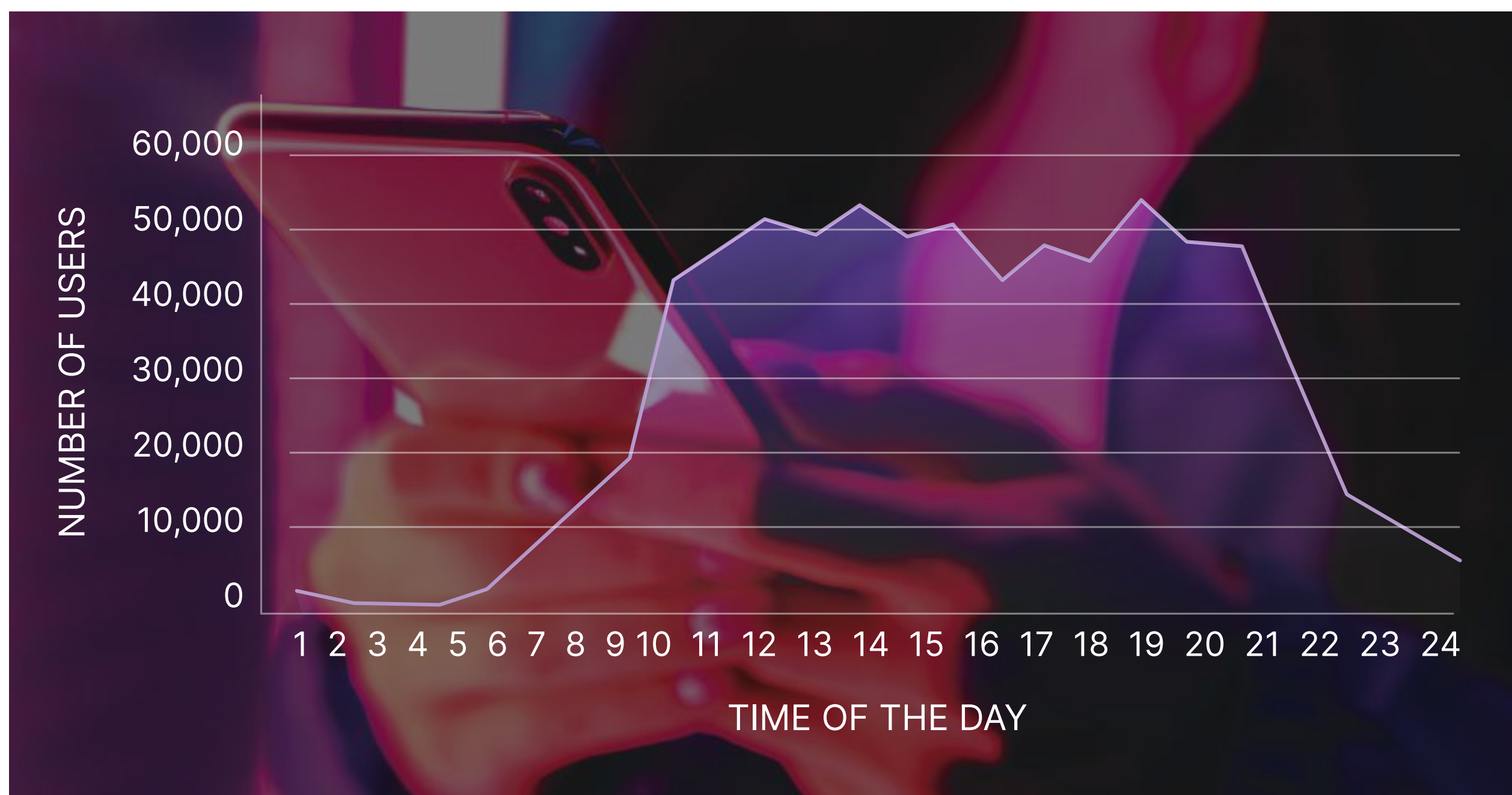
4 K+
Amateur
Participants



TOURNAMENTS: THE NEED TO LEAD

- In the realm of always-on Live tournaments, gamers truly shine
- Gamers are driven by a passion to win and moving up the creative leaderboard excites them
- This world is alive from 8 AM to 11 PM

NOSTRA TOURNAMENTS CONSUMPTION BY TIME OF THE DAY



15 Tournaments
Per Day



15+ Tournaments
Categories



3X Growth
in Daily Active
User Base



NOSTRA INDONESIA:
A YEAR OF
LOVE

INDONESIA: HERE TO PLAY!

Indonesia boasts a youthful and tech-savvy population, with an average age of 29 and over 40% of its people aged below 24. With 77% of its population as internet users and the number of mobile connections surpassing 128% of the total population, Indonesia emerges as a fertile ground for mobile gaming.

Indonesia's top mobile gaming categories: action, adventure, and casual games. Mobile gaming sessions soared by 14% in Q1 2023 compared to Q4 2022.



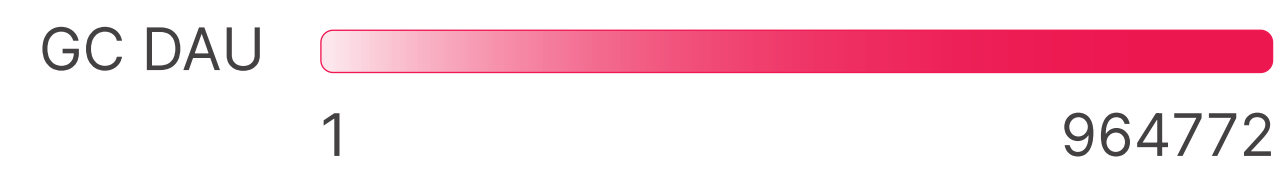
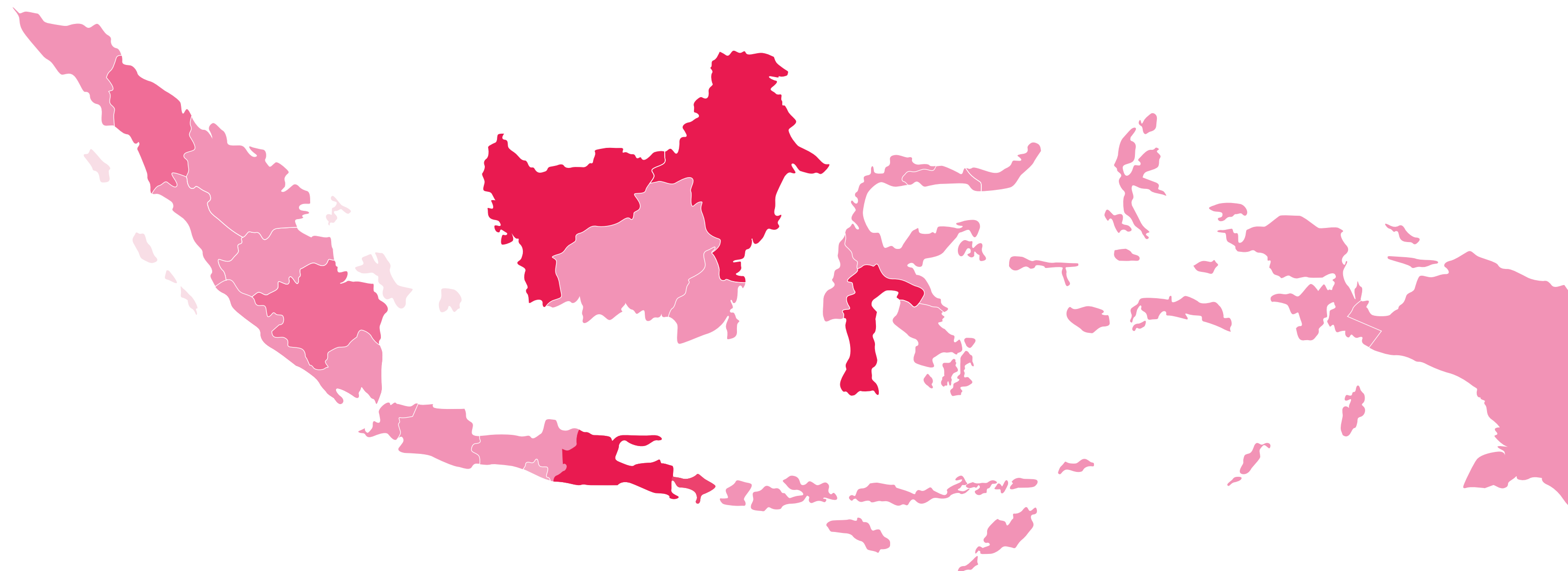
Mobile gaming's key motivators span all demographics, yet, thrill-seeking and unwinding hold particular significance. Indeed, mobile gaming motivations encompass aspiration, entertainment, escapism, competition, socializing, time-killing, relaxation, and brain training

Since its May 2022 launch, Nostra has captivated Indonesians at an exhilarating pace, making it their very own gaming platform!

ACROSS ALL THE ISLANDS

As the largest Archipelagic state in the world, the beautiful stretch of islands are all united by their shared culture, history, and of course, Nostra!

**DISTRIBUTION OF DAILY ACTIVE USERS
ACROSS ISLANDS, JUNE 2023**

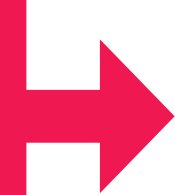


ONE YEAR AND MANY MILLIONS

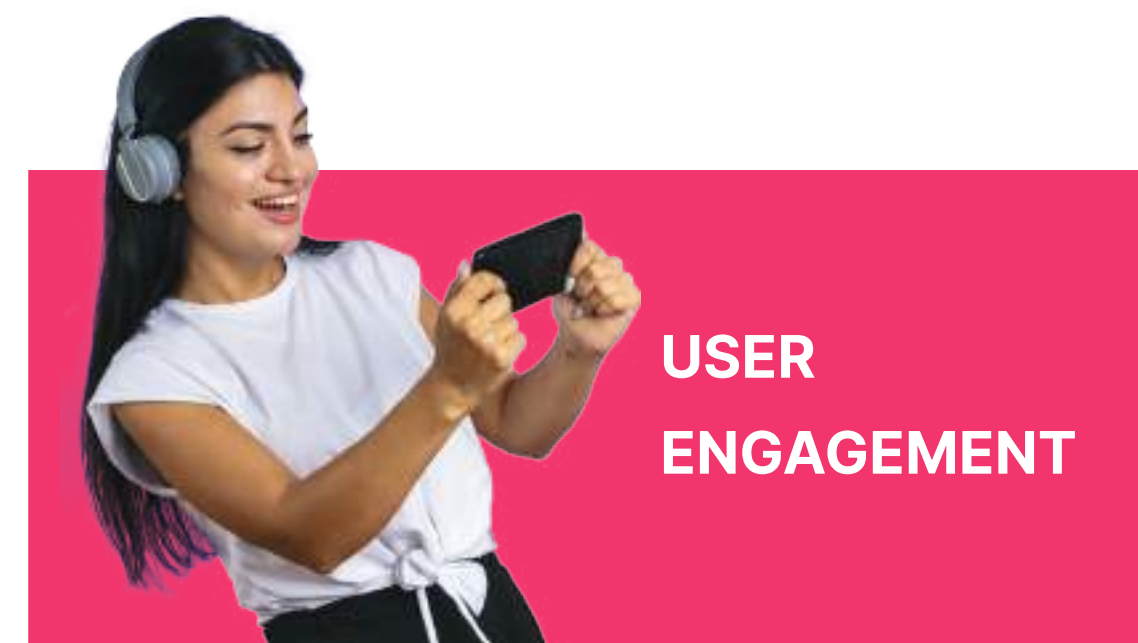
With **7.6 Mn** monthly active users in just a year, this young Island nation has embraced Nostra as its go-to gaming experiences platform.



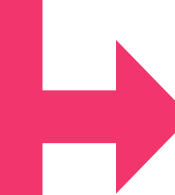
**MONTHLY
ACTIVE USERS
(MAU)**



1.1x
Growth Since
Dec - 2022.



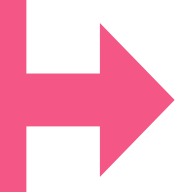
**USER
ENGAGEMENT**



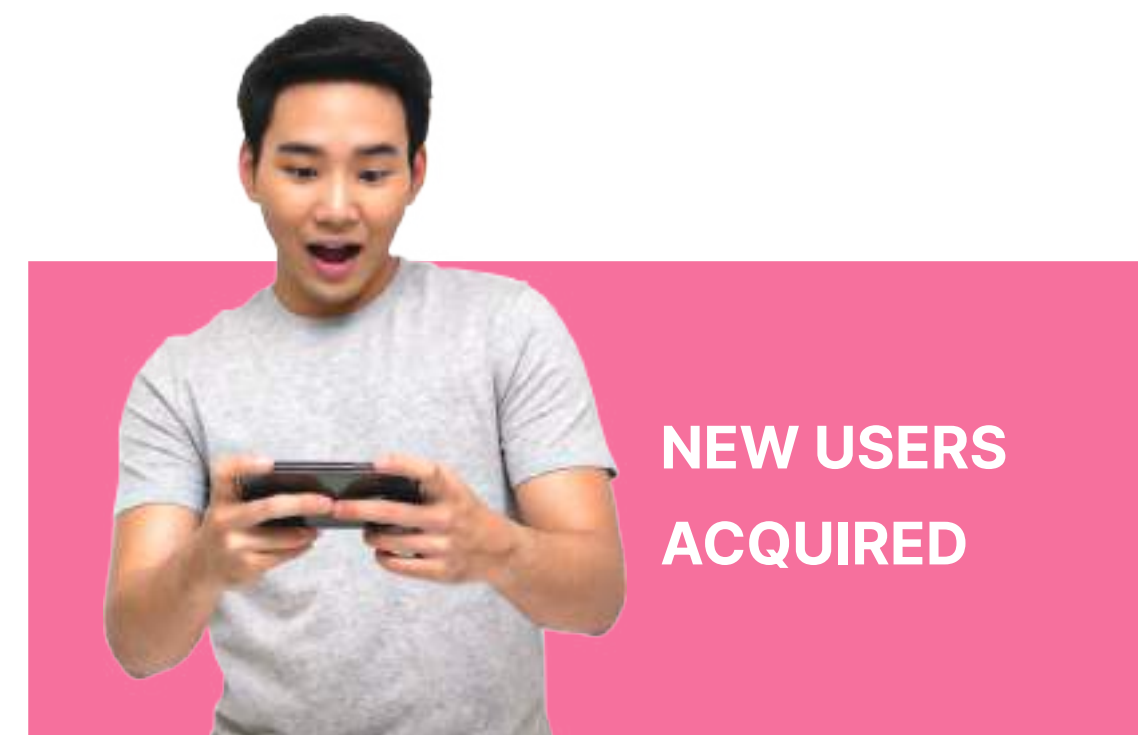
10%
More Sessions
Played Per Day



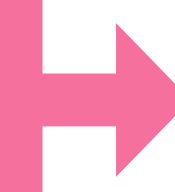
**DAILY ACTIVE
USERS (DAU)**



1.05x
Growth Since
Dec - 2022.

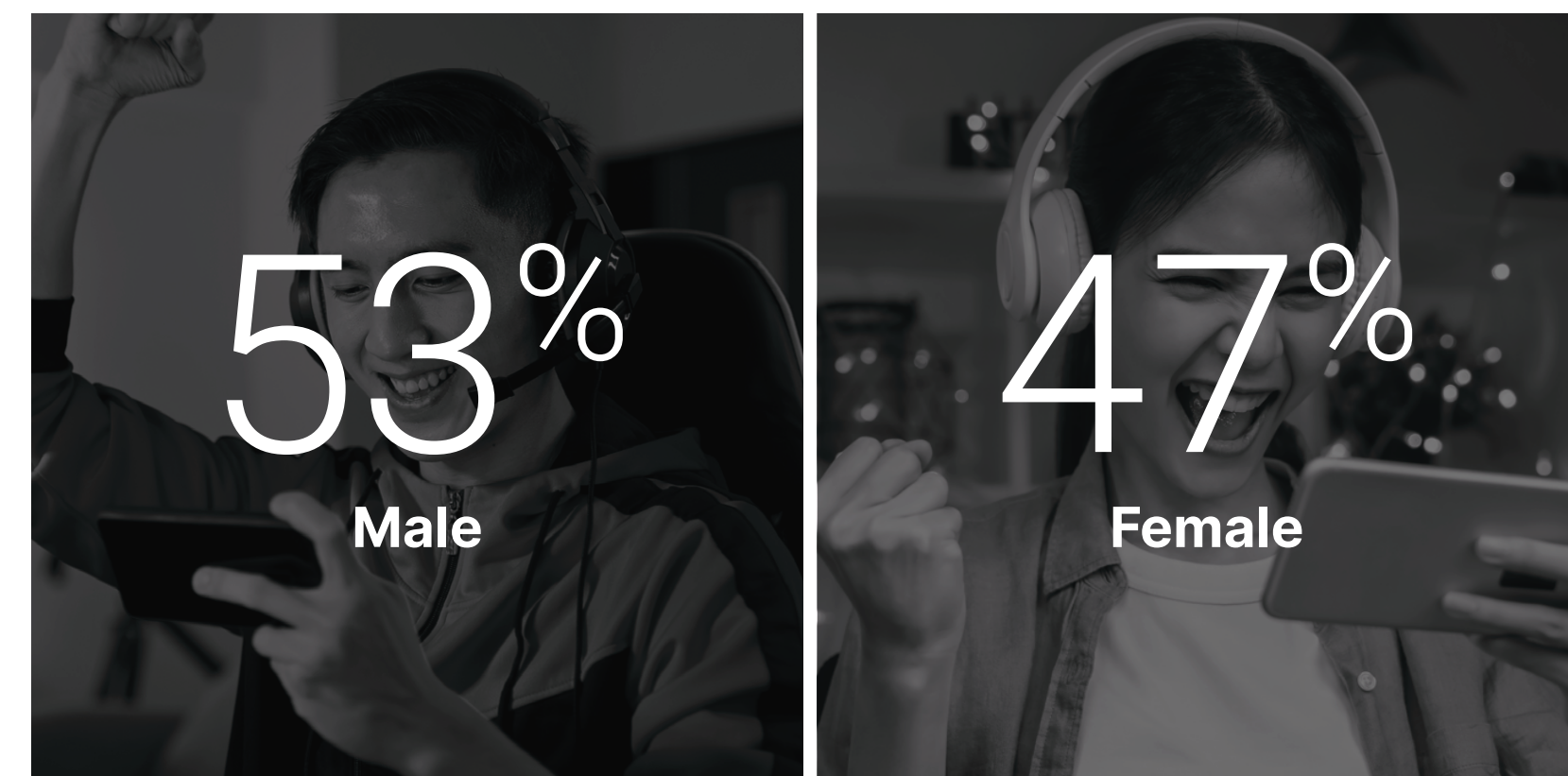


**NEW USERS
ACQUIRED**



1.3x
Growth Since
Dec - 2022.

NOSTRA CONSUMERS, GENDER COMPOSITION



NOSTRA CONSUMERS, AGE COMPOSITION



GAMING MOST FREQUENT, (AL)MOST EQUAL

3 out of 5 Nostra users engage in gaming more than twice daily.

Wide range of games on offer keep young gamers (44%) plugged into Nostra.

The motivations to play are universal...

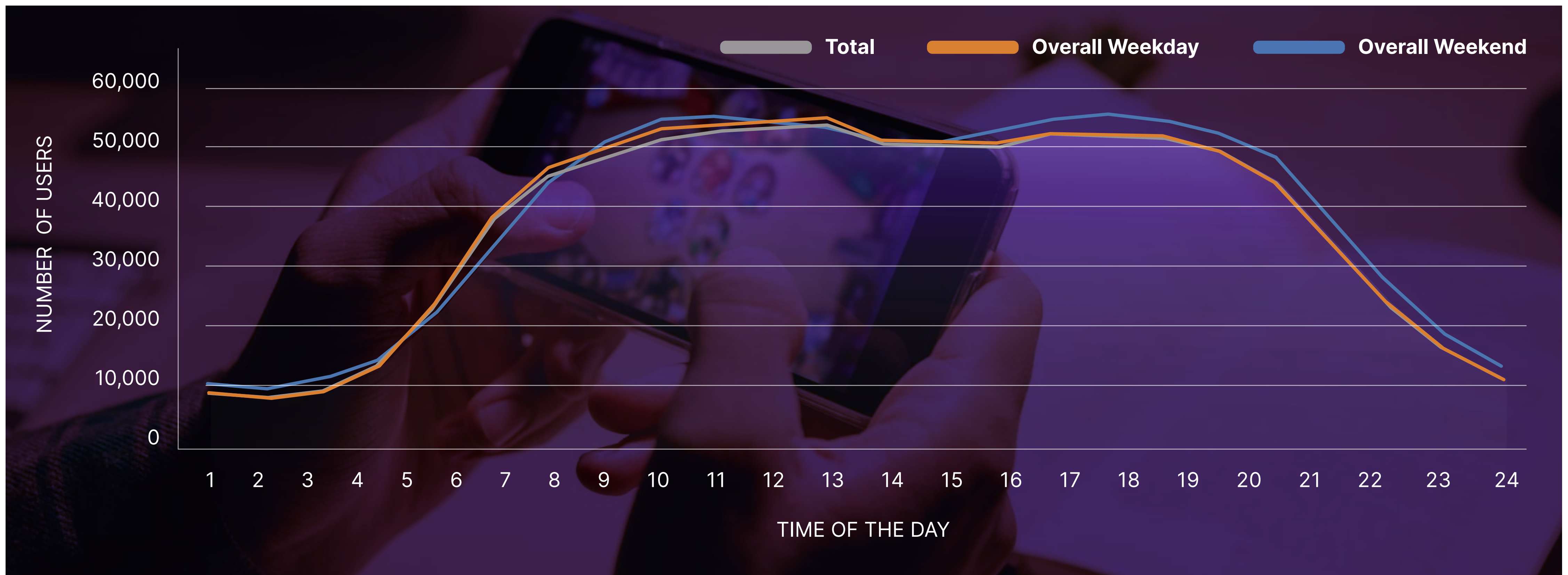
Nostra's winning trio:

- **Simple to navigate and enjoy**
- **Fascinating variety of gaming experiences**
- **Ideal gaming platform to spend time**

SPREAD ACROSS THE DAY

The hours just before lunch (11 AM-12 PM) and early evenings (4-6 PM) are the peak times.

NOSTRA CONSUMPTION BY TIME OF THE DAY





DEVELOPERS:
EASE AND
AUTONOMY

VISIBILITY

360

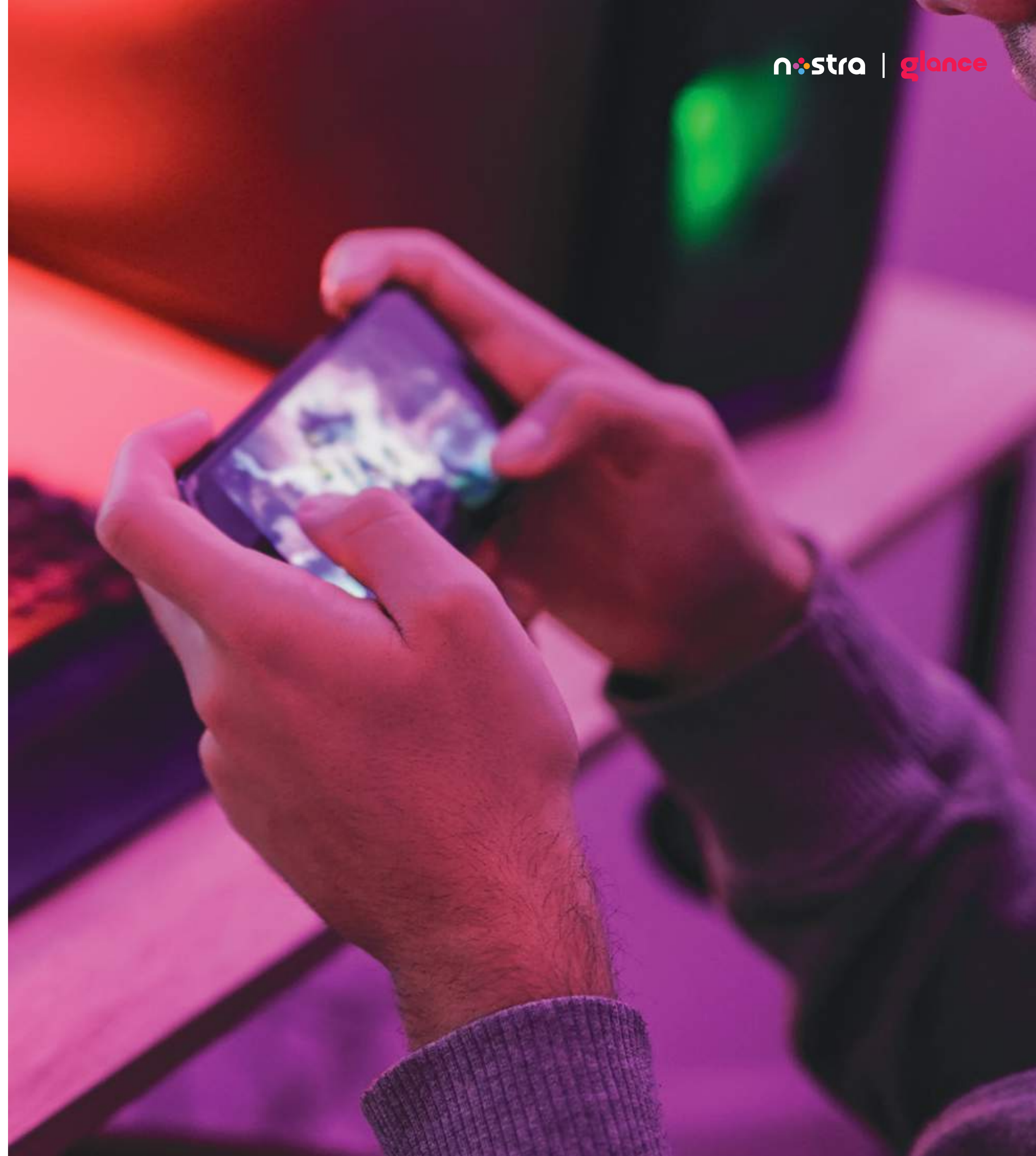
Besides being the largest mobile gaming platform in India and Indonesia, Nostra is also the platform that brings together

44 Developers across
6 countries

90Mn Users, across
demographics

580Mn Minutes of
gaming monthly

With maximum efficiency and utmost transparency.



SIMPLIFICATION, BEYOND ACCESS, WITH A 3-STEP INTEGRATION

Nostra's ease-of-use extends seamlessly to game developers through a straightforward three-step integration process

- Unified Publishing Portal and Knowledge Hub
- Nostra SDK to integrate all features
- Access and complete control post deployment

Load game on the
Developer Portal



Integrate
Nostra SDK



Ad integration
on content



Publish on
Glance





LEADING DEVELOPERS INTO A A WORLD OF 'MORE'

Discovery at scale

Making games stand out by reaching users directly on their lock screen

New markets, diverse players

The diverse and highly-engaged user base ensures that every game (from every genre) reaches the right gamer

Unlimited engagement opportunities

Engaging and retaining users with multiple immersive formats that go beyond gameplay, including updates, live events, connecting features, tournaments, and much more

DEVELOPERS SPEAK

“

Nostra is a great publishing partner for instant games. The team constantly strives to deliver a stellar and transparent experience to its studio partners. I'm glad we have had the opportunity to publish our games with Nostra.

-Felicity

”

“

Integrating Nostra's SDK is quite easy... streamlined and efficient.

-Debasis Kuila, Gameson

”

“

With Nostra, we have experienced increased visibility and user acquisition, enabling us to expand our game's reach and maximize its potential. We are grateful for the opportunities Nostra has provided us as game developers and highly recommend it as a trusted platform for distributing games.

-ARClight

”

“

Exciting insights into markets we haven't worked in before...

**-Kevin Bernatek,
Business Manager, Famobi**

”





LEADERBOARDS:
THE NOSTRA
POWER RANKINGS

TOP 5 INSTANT GAMES: INDIA



DAU - 2.4 Mn



DAU - 4.5 Mn



DAU - 5.7 Mn

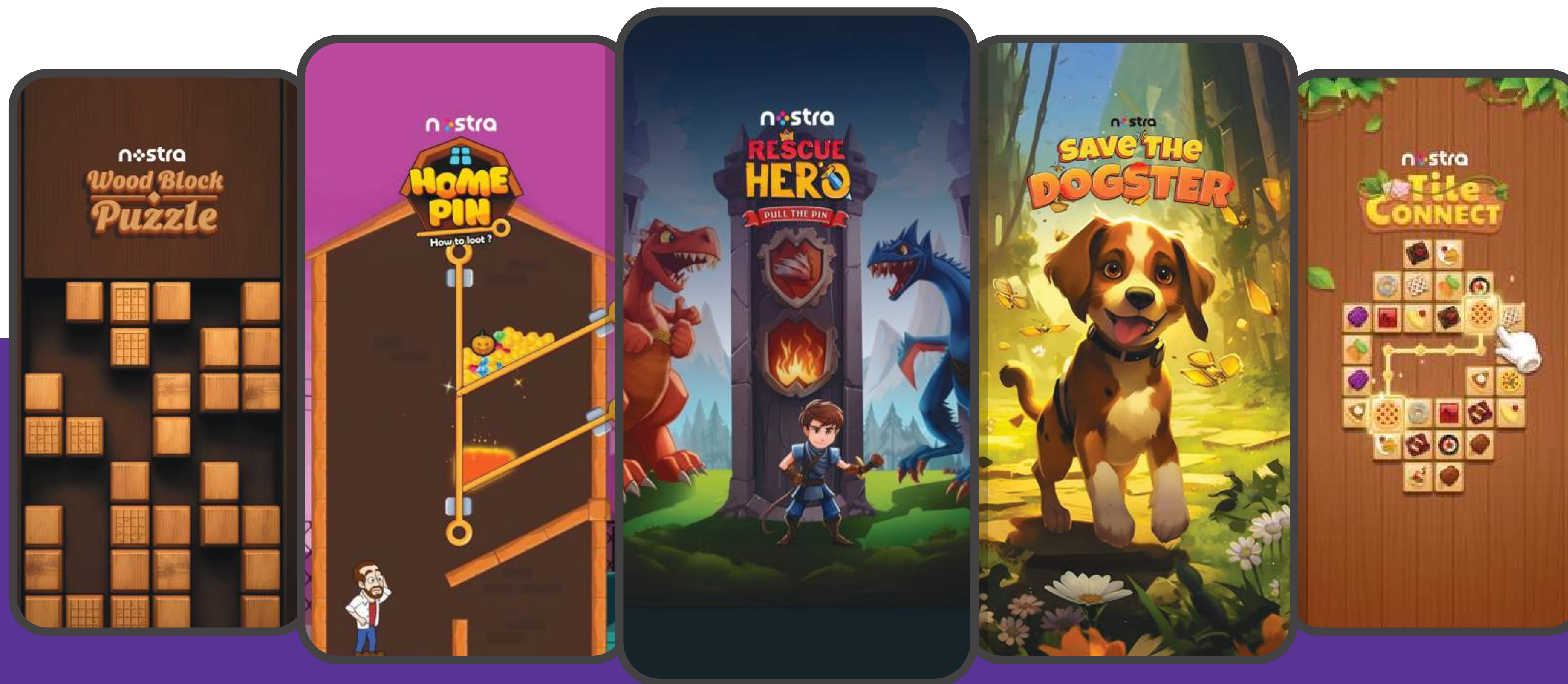


DAU - 4.7 Mn



DAU - 4.3 Mn

TOP 5 INSTANT GAMES: INDONESIA



DAU - 109 K

DAU - 240 K

DAU - 293 K

DAU - 261 K

DAU - 256 K

TOP 3 TOURNAMENTS: INDIA

Wood Block Journey

DAU - 177 K



Chhota Bheem Bubble Master

DAU - 108 K

Pop Jewel

DAU - 109 K

TOP 3 STREAMERS: INDIA

TRAZEMAG

No. of viewers/stream - 41 K

Average watch hours - 1.7 K



WEREWOLFX

No. of viewers/stream - 36 K

Average watch hours - 1.5 K

SHERNI

No. of viewers/stream - 40 K

Average watch hours - 1.8 K

TOP 3 STREAMERS: INDONESIA

SELLY TAENGO

No. of viewer/stream - 46 K

Average watch hours - 1.8K



COCACILA

No. of viewers/stream - 40 K

Average watch hours - 1.5 K



RADIT OVERKILL

No. of viewers/stream - 13 K

Average watch hours - 0.5 K

METHODOLOGY

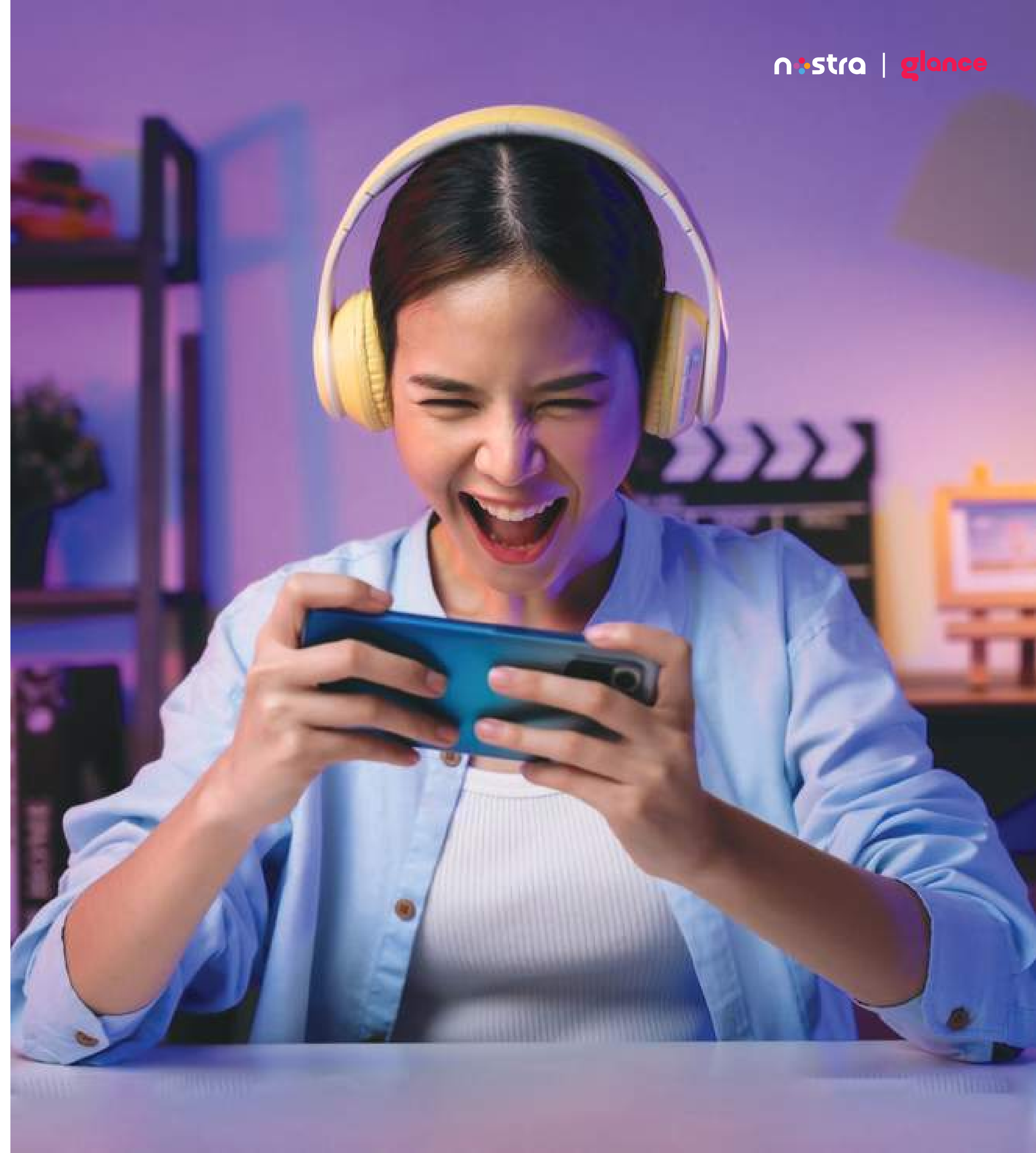
This findings in this report are based on Nostra platform analytics, consumer survey data and industry reports; OEM brands covered Xiaomi, Realme and Samsung

Time frame:

Jan 2023 to Jun 2023

Target consumers:

Nostra Consumers





LINGO

OEM:

The mobile manufacturer company on which we display our content

Connect:

Discussion forum to connect with other players for any game

DAU:

The number of unique users who came into the gaming section of Glance in a day

MAU:

The number of unique users who came into gaming section of Glance within a 30-day window

Mn & K:

Numbers in millions (Mn) and
Numbers in thousands (K)

ABOUT GLANCE

Founded in 2019, Glance is a consumer technology company that operates some of the most disruptive digital platforms including Glance, Roposo, and Nostra. Glance has redefined the way internet is consumed on the lock screen, removing the need for searching and downloading apps. Over 400 million smartphones now come enabled with Glance's next-generation internet experience.

Nostra is India and Southeast Asia's largest gaming platform with a rich variety of gaming experiences (instant, online, live, tournaments). The platform offers game developers innovative plug-and-play solutions and instantaneous access to passionate gamers, while brands can leverage it for unique contextual engagement with their audiences.

Headquartered in Singapore, Glance is an unconsolidated subsidiary of InMobi Group and is funded by Jio Platforms, Google, and Mithril Capital. For more information visit glance.com, roposo.com and inmobi.com

THANK YOU

Reach out to insights@glance.com



For more information, visit
glance.com