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OPENING THE DOOR TO [MOBILE] ASIA

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#1

Global market leader in mobile attribution & marketing analytics

70%

Market share in Asia

4k

Customers in Asia

AliExpress, Baidu 百度, Tencent Games, cheetahmobile, musical.ly, IGG I GOT GAMES, Alibaba Group, 5miles, ibibo, JD.COM 京东, meitu, 360 www.360.cn, agoda, GO-JEK, tap4fun

500B

Mobile actions measured globally per month

5 (50 on staff)

Offices in Asia

- Beijing
- Bangkok
- Bangalore
- Tokyo
- Seoul

Asia LOVES mobile

Even more than the rest of us...

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The Sheer Size

4,000,000,000

mobile connections in Asia

Source: GSMA

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Future Looks Bright

~1B

new smartphone connections forecast in Asia by 2020

Source: GSMA

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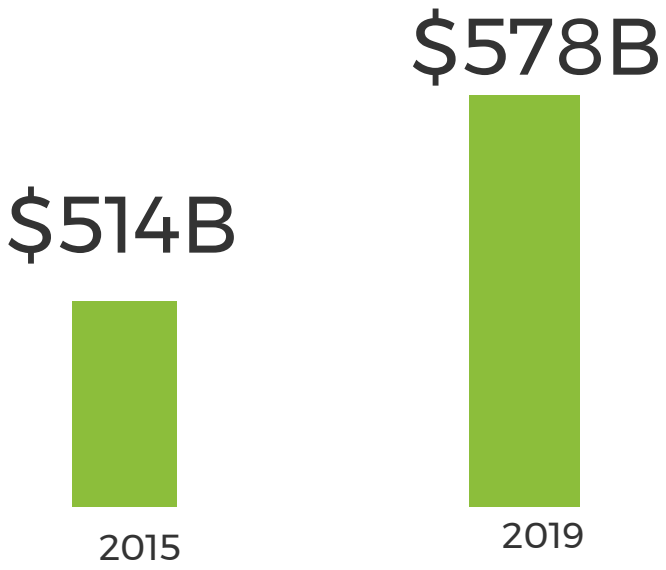
Asia is the World's largest region in terms of mobile related spend*



Source: IDC

* Consumer and enterprise hardware (e.g., smartphones, portable PCs, and tablets), services (e.g., connectivity services) and software.

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The Asian App Economy Boom

Hardware growth maturing, infrastructure improving

2x

Growth in software revenues

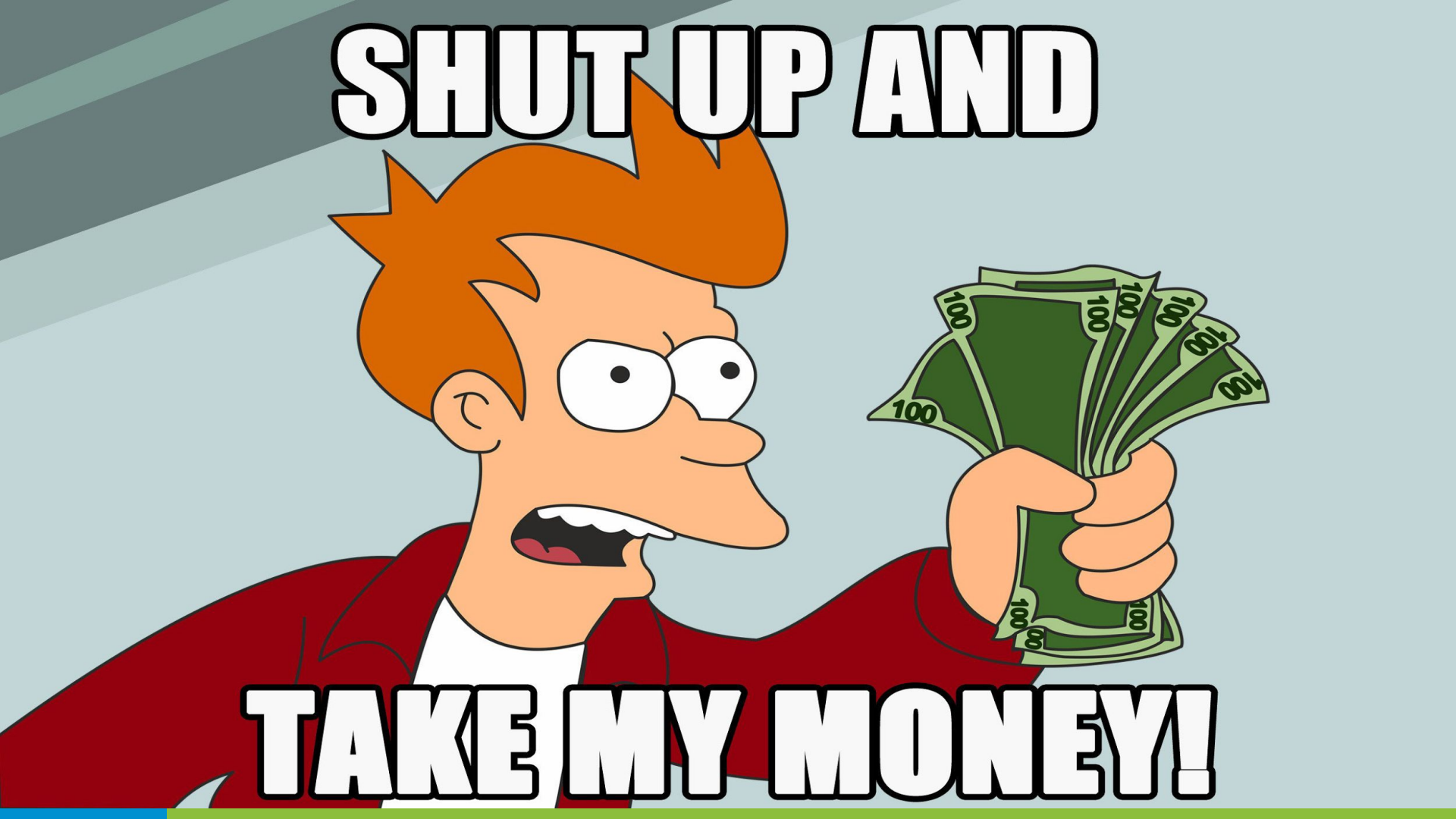
Source: IDC

Ad Budgets Are Following

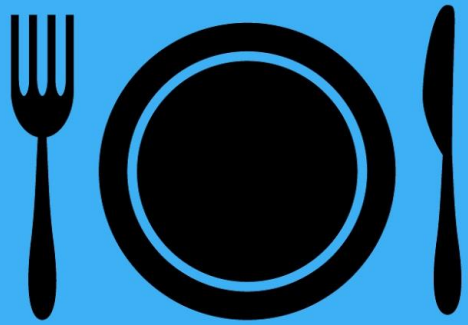
Mobile Internet Ad Spending Asia Pacific,
2015-2020

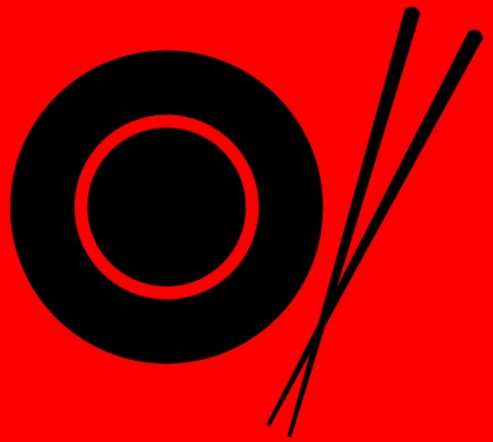
2015	2016	2017	2018	2019	2020
$25.3	$40.5	$55.7	$78.9	$93.4	$107.6
97.7%	59.7%	37.6%	38.0%	21.6%	15.1%

Source: eMarketer


SHUT UP AND
TAKE MY MONEY!

Before you get too excited, it's vital to understand Asia is a different animal





In the West, Data is Not An Issue

	US
Average monthly salary	$2,987
Cost of data	1MB = $0.01

But in Asia, Data Certainly is An Issue

China
$886

1MB =
$1.13

Malaysia
$801

1MB =
$0.61

India
$532

1MB =
$0.38

Thailand
$403

1MB =
$0.32

Indonesia
$351

1MB =
$0.30

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Handset Fragmentation

While the market share of iPhones and Samsungs dropped to 13% and 20% respectively from 18% and 24% two years ago, Huawei and Oppo are climbing; over 40% of handsets are of brands we never hear of.

Main Brands

OEM Brands

Messaging Apps As a Platform / Way of Life

- Communication tool
- Send and receive money
- Shop
- Book restaurants / vacation
- Order taxis
- And more...

All from the app

Mobile Payments

53%

of connected consumers use mobile to pay for goods or services at point of sale via apps

Source: Kantar TNS

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Do Not Proceed Independently!
Proper Localization is a Must

In itself, Asia is
Extremely Fragmented

Developed

Japan

Korea

Singapore

Developing

China

India

Emerging

Indonesia

Vietnam

Myanmar

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Let's Focus on the Largest, Most Exciting Market

Developed	Developing	Emerging
Japan	China	Indonesia
Korea	India	Vietnam
Singapore		Myanmar

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WAKE UP TO CHINA!

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Mobile Users, % of Internet Users

China has 700M mobile users, which represents 95% of total internet users

图 38　中国手机网民规模及其占网民比例

#1 On The App Store

Massive Ad Spend Growth Forecast

Mobile Ad Spend in China (Billions)

2016	2017	2018	2019	2020
$27.31	$37.63	$49.18	$60.25	$70.43

Source: eMarketer

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Powerful Media Sources In Your Market

Banned in China since 2009

Left China in 2010

Blocked in China

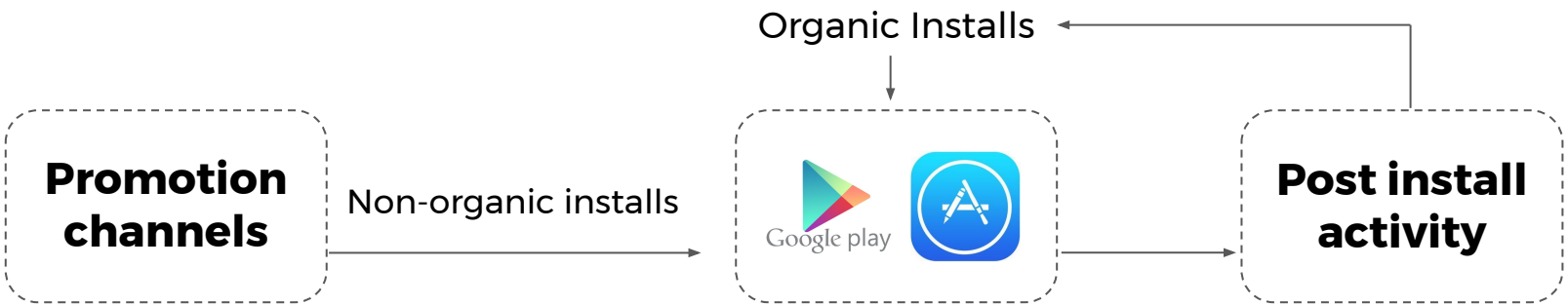
Blocked in China

Instead, The Media Market is Dominated By Powerful Local Players

Tencent 腾讯

Baidu 百度

The App Landscape You Know



Attribution / measurement partner

But In China...

iOS

Same as the rest
of the world
(except for the different media powerhouses)

Android

OVER 300 APP STORES

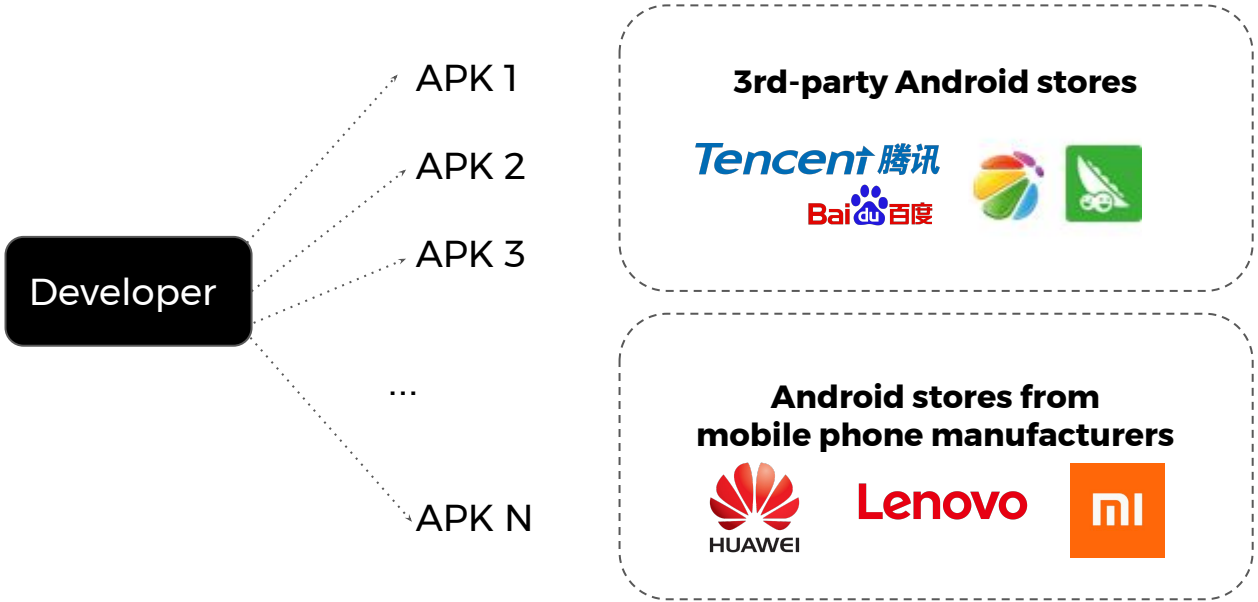
APK per store

Most don't support
tracking links

The Android Landscape in China

Stores do both app listing and promotion

No attribution is needed as all marketing within a store is driven by the store itself.
But there is also no distinction between organic and non-organic...



Android Fragmentation

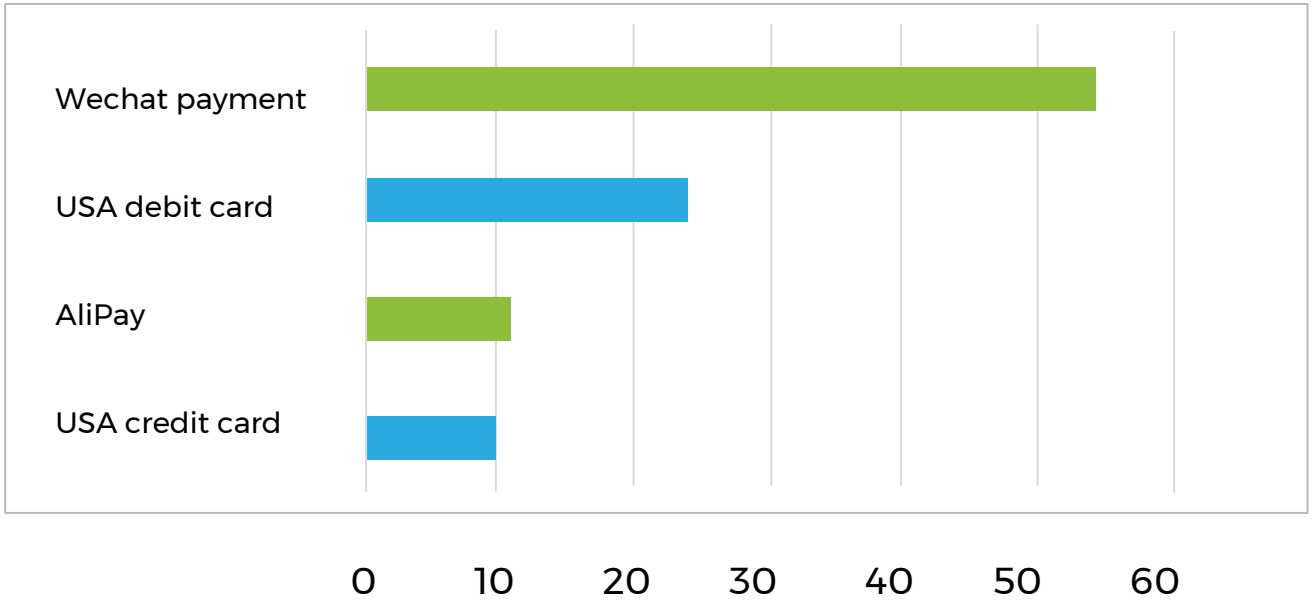
"If you want to scale, publishing on 40 to 60 Android markets at game launch is pretty standard."

Vincent Diao, VP Yodo1

Source: Chartboost

Smartphones = Wallets

Monthly Payment Transactions Per User in China



Bureaucracy

New regulations in place since July 2016 affecting gaming apps due to the high level of piracy in the market

Most Non-Gaming Apps

Same as the rest of the world:
submit to store and await approval

Gaming Apps

1) Setup a local entity

2) Fill in the forms to get a publication number

3) Load your game into a smartphone, and send to authorities to verify its content

4) Wait for up to 3 months

Loophole: Still technically self-publish (on iOS only) if you're a non-Chinese company

Bureaucracy

Chinese government more lenient towards Apple for now

iOS

Publication Number requirement on hold for the time being

Android

Publication Number required

The Bottom Line

Challenges

Opportunities

These challenges can be overcome! And the Asian market with all its potential are for the taking for those who overcome

GREAT SUCCESS!

Thanks!
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