



FREE
VERSION



2017 GLOBAL **MOBILE** MARKET REPORT

TRENDS, FORECASTS, APP
MARKETS, MOBILE DEVICE
USAGE, AND SMARTPHONE
PENETRATION

newzoo

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Get the Real Deal, Working with Us, Our Global Partners



INTRODUCTION

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FOREWORD

GLOBAL MOBILE MARKET REPORT

This is the maiden edition of Newzoo's annual Global Mobile Market Report, which aims to provide subscribers with a global overview of the mobile market with a focus on consumers and their interaction with actively used devices, rather than defining the market in terms of units shipped. Identical to Newzoo's other flagship global reports on games and esports, this report is part of a subscription service that includes quarterly update reports and continuous access to a Tableau dashboard with smartphone penetration and app revenue forecasts. The data is derived from our full mobile intelligence portfolio of services that aims to serve all industries where mobile developments are a key consideration for strategy, product development, or marketing.



JELLE KOOISTRA
Newzoo Head of Mobile

"Our mobile intelligence portfolio is the result of almost two years of preparation, partnering, data sourcing, and modeling. The resulting intelligence focuses on active devices, users, and the app (store) economy. From a geographic perspective, our Chinese partner and strategic investor TalkingData plays a key role in enabling us to paint a truly global picture, previously unavailable in the market."



PETER WARMAN
Newzoo CEO & Co-Founder

"In brief, we believe that the current pace of change in consumer behavior, media consumption, and technology requires a new type of intelligence firm that is agile, innovative, truly global, and ahead of the curve. Ultimately, we aim to be recognized as the #1 provider of games, esports, and mobile intelligence in the world. This report is a key first step toward achieving that ambition."



INCLUDES QUARTERLY UPDATES & DASHBOARD ACCESS
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SCOPE & METHODOLOGY

Newzoo's mobile intelligence service provides unique and broad insight into the mobile ecosystem, including active devices, users, apps, and app stores. Our analysis of historical data and current trends forms the basis of our views on key developments shaping the mobile market. Our market intelligence aims to provide actionable data that helps answer important questions in areas such as product development and strategy. This report combines data from three separate but linked models, which are the basis for the most important takeaways. We reevaluate all our models on a quarterly basis, ensuring up-to-date information on the market for our clients.

1. APP REVENUES MODEL & FORECAST

Newzoo's app store revenue forecast model is based on analysis of several data sources, including historical app store data, the financial performance of relevant companies, and socio-economic development indicators for individual countries, such as internet and smartphone penetration rates. Historical app revenue and download estimates are corroborated by data from our strategic partner Priori Data and Newzoo's proprietary app store tracking technology.

Key definitions:

- APP REVENUES:** All direct consumer revenues that pass through app stores, including third-party Android stores. Advertising and e-commerce revenues are excluded.
- NON-GAME APP REVENUES:** Revenues generated through in-app purchases, subscriptions, or paid installs from apps that are not categorized as games by app stores.
- GAME REVENUES:** Revenues generated through in-app purchases, subscriptions, or paid installs from apps that are categorized as games by app stores.

2. SMARTPHONE USERS MODEL & FORECAST

A key part of the report is sizing the smartphone market in terms of active users, rather than units shipped. We focus on how many consumers use a smartphone on at least a monthly basis. To calculate this, we have developed a detailed model using several socio-economic development indicators per country. Most importantly, we consider a country's economic development to determine how many consumers can afford a smartphone. Furthermore, we make use of demographic variables, as the smartphone penetration in certain age groups will be higher than others. We also adjust

for inequality to ensure a country's wealth is representative of the larger population, rather than a select group that is able to afford a smartphone. Finally, census data allows us to monitor the total size of various countries, and how this will develop in the near future. Results are benchmarked with key clients and partners in the industry, as well as third-party reports and industry news.

Key Definitions:

- SMARTPHONE USER:** An individual who possesses his/her own smartphone and uses it at least once a month.
- SMARTPHONE DEVICES USED:** The total number of smartphone devices used at least once a month by smartphone users.

3. SMARTPHONE & TABLET TRACKING

Newzoo's Smartphone and Tablet Tracking service is also based on a combination of various data sources. We collect and process global monthly device usage data from strategic partners, giving us aggregated data on the number of actively used devices and models around the world, enriched with more detailed information, such as chipset, screen size, or memory size per model. In total, the monthly sample consists of more than 400 million devices. The results are extrapolated to total smartphones and tablets actively used in each country and provide key insights into the MAU of brands, models, and spec details (e.g., type of device, battery sizes, screen resolutions, and many more characteristics). We focus on the two dominant mobile operating systems, iOS and Android, and cover the top 100 countries in terms of smartphone users. Together, these 100 countries cover 98.5% of the smartphone users in the world.

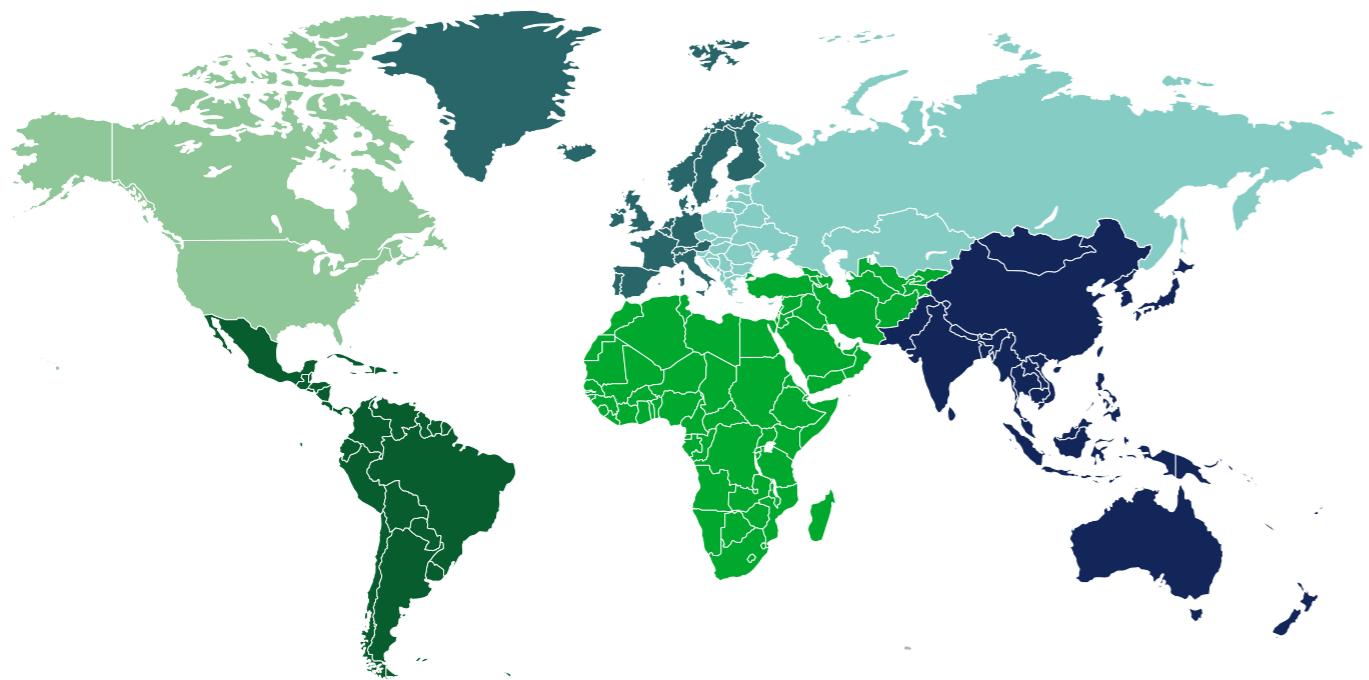
Key definitions:

- ACTIVE DEVICE:** A device used at least once a month.
- SMARTPHONE:** A device with a screen size under 7 inches and an advanced operating system.
- TABLET:** A device with a screen size of 7 inches or larger and an advanced operating system.
- DEVICE BRAND:** Manufacturer or brand name of the device as indicated by the device software.
- HIGH-END DEVICE:** Devices with at least 2GB of RAM, 2 CPU cores, NFC, fingerprint scanning, 4G compatibility, and a launch date after 2014.

KEY TAKEAWAYS

REGIONS

All data sources are grouped into six regions: North America, Latin America, Western Europe, Eastern Europe, the Middle East and Africa, and Asia-Pacific.



- NORTH AMERICA
- EASTERN EUROPE
- LATIN AMERICA
- MIDDLE EAST & AFRICA
- WESTERN EUROPE
- ASIA-PACIFIC

SMARTPHONE USERS AND PENETRATION

In 2016, there were **2.3 BILLION SMARTPHONE USERS** globally, or 31% of the total population. In 2020, this will grow to 3.6 billion smartphone users, close to half of the world's population. Together, they will use 4.2 billion smartphone devices in 2020.

CHINA has the most smartphone users, with **717 MILLION** actively using a smartphone in 2017. China is followed by India, the U.S., Brazil, and Russia as the largest smartphone markets by number of users.

In 2016, **INDIA** overtook the U.S. as the world's second-biggest smartphone market. The gap between the two countries will increase as India will grow strongly to **300 MILLION** smartphone users by the end of 2017, while the number in the U.S. will only grow modestly to 226 million.

The world's highest **SMARTPHONE PENETRATION** can be found in the **MIDDLE EAST**. In countries such as Qatar, the United Arab Emirates, Bahrain, and Kuwait, more than 75% of the country's population has a smartphone.

SMARTPHONE AND TABLET DEVICES



At the end of 2016, the **100 LARGEST MARKETS** in the world in terms of smartphone users accounted for more than 98% of all smartphone users. In these countries, **2.8 BILLION SMARTPHONES** were in use, in addition to **260 MILLION TABLETS**.

SAMSUNG is the leading smartphone manufacturer, with **859 MILLION** of all smartphones in use globally made by the Korean company. **APPLE** ranks second with **704 MILLION** actively used smartphones. The two market leaders together account for 56% of the total number of smartphones that are currently in use worldwide.

At the end of 2016, there were 260 million active tablets. The joint **MARKET SHARE** of **SAMSUNG AND APPLE** in this segment is even higher with **89%**. Apple leads with 166 million active tablets, more than double Samsung's 65 million.

CHINA is the largest smartphone market with **875 MILLION** smartphones in use at the end of 2016. Its sheer size allows manufacturers that largely focus on the local Chinese market, such as **VIVO** and **OPPO**, to reach a scale similar to other global players. In fact, six out of the top 10 global brands in terms of smartphone use have Chinese roots.

APP STORE REVENUES

APP STORE REVENUES are forecast to grow from **\$46.2 BILLION** in **2016** to **\$85.0 BILLION** in **2020**.

Over the same period, revenues from mobile games will grow from \$38.6 billion to \$65.0 billion, resulting in a significant increase in market share of non-game apps. The share of total app store revenues accounted for by non-game apps is expected to grow from 16.4% (\$7.6 billion) in 2016 to 23.6% (\$20.0 billion) in 2020.

The biggest region in the world in terms of app store revenues in 2017 is **ASIA-PACIFIC**, accounting for **\$31.8 BILLION (56%)**. Taking third-party app stores into account, China is the biggest single market within Asia-Pacific, generating \$16.4 billion in consumer spend on apps. North America and Europe are considerably smaller in terms of revenues, with \$10.6 billion and \$8.5 billion, respectively.

CHINA is also poised for relatively strong growth in the coming years, with a **CAGR** of **+21.2%** from 2016 to 2020, resulting in revenues of \$26.3 billion in 2020. The regions with the strongest growth in the same period are the Middle East and Africa (+36.0% CAGR) and Latin America (+25.9% CAGR).

THE GLOBAL MOBILE MARKET & SELECTED TRENDS

2





GLOBAL OVERVIEW | 2017



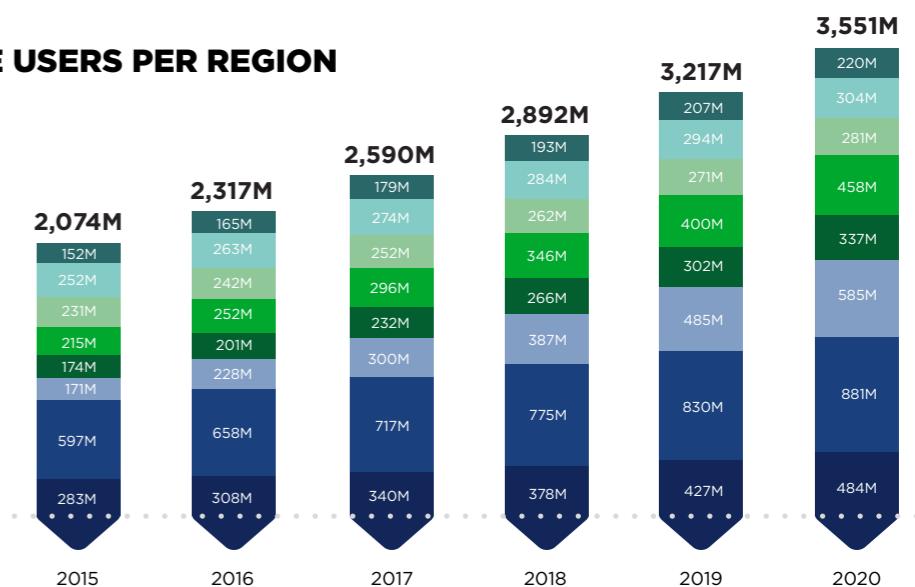
*high-end devices have at least 2GB of RAM, 2 CPU cores, NFC, fingerprint scanning, 4G compatibility, and were launched after 2014.

SMARTPHONE USER FORECAST

GLOBAL

GLOBAL SMARTPHONE USERS PER REGION

2015-2020



*Excludes India & China

Globally, there will be 2.6 billion smartphone users in 2017. More than half of these will come from the Asia-Pacific region, with 717 million smartphone users in China alone. Together, Asia-Pacific, Europe, and the Middle East and Africa will account for 80% of the global total this year. In 2020, there will be 3.6 billion smartphone users, with Asia-Pacific as the biggest growth region thanks to countries such as India, Indonesia, and China. Asia-Pacific will have almost 2 billion smartphone users in 2020, while Europe, the Middle East and Africa, and North America together will have 1.3 billion. Latin America will surpass North America in terms of smartphone users in the coming years. Developing countries, such as Nigeria, will grow fast in terms of smartphone users compared to mature markets, such as Europe and North America.

TOP COUNTRIES BY SMARTPHONE USERS

2017 | GLOBAL

RANK	COUNTRY	SMARTPHONE USERS	SMARTPHONE PENETRATION
1	CHINA	717M	51.7%
2	INDIA	300M	22.4%
3	UNITED STATES	226M	69.3%
4	BRAZIL	79M	37.7%
5	RUSSIAN FEDERATION	78M	54.7%
6	JAPAN	63M	50.1%
7	GERMANY	55M	68.8%
8	INDONESIA	54M	20.7%
9	MEXICO	52M	40.7%
10	UNITED KINGDOM	44M	68.6%

MOBILE VIRTUAL REALITY



GLOBAL
FEATURE
MOBILE
VIRTUAL
REALITY

HOW VR-READY IS THE MOBILE WORLD?

Virtual reality will one day be part of daily life, but where do we stand today and what can we expect in the meantime? Since 2016, manufacturers have been selling VR headsets, allowing users to enter new worlds and enjoy new experiences. The highest profile devices include the PlayStation VR, Oculus Rift, and HTC Vive, all of which are tethered and developed with PC and console gaming in mind. These high-end devices have enjoyed considerable commercial success, particularly the PlayStation VR with almost 1 million devices sold in just over four months since launch. The consumer interest for these devices will remain strong, but they are unlikely to become mainstream until prices come down, more (non-gaming) content is available, and various practical issues are solved. For instance, many players still experience motion sickness and setting up a VR environment typically requires a lot of free space.

Mobile VR presents a far bigger market opportunity in the short term. Handset manufacturers across the globe have been developing their own headsets, with Samsung Gear VR and Google Daydream taking the lead in the West and many vying for market leadership in China. How have these peripherals performed and what will trigger mass uptake?

Looking at hardware (unit) sales, mobile VR is not yet a billion-dollar business, with devices generally retailing for less than \$100, compared to the \$400+ price point for a tethered VR headset. Nonetheless, mobile VR headsets have commercial traction, as illustrated by Samsung's announcement that it had sold 5 million Gear VR headsets by January 2017 (initially launched in November 2015). While this seems like a big number, it is only a fraction of the overall addressable market, defined as Samsung devices compatible with Gear VR. If the 5 million device sales were in the U.S. alone, they would have covered 21% of the addressable market. However, the total global market of compatible Samsung devices is more than 180 million, meaning market penetration is less than 3%.

NUMBER OF ACTIVE DEVICES COMPATIBLE PER VR PLATFORM

GLOBAL | JANUARY 2017

GEAR VR

184.4M

DAYDREAM

4.9M

In China, mobile VR has been enthusiastically received. As VR arcades and "experience zones" mushroomed across cities and shopping malls, local manufacturers have been very quick to spot the mobile VR opportunity. Baofeng Mojing reported selling more than 1 million devices priced at around \$30 each, and online retailer Alibaba reported sales of more than 300,000 mobile VR devices per month. These are all manufactured domestically, based on the open-source Google Cardboard specs, by brands like RiTech, VirGlass, Pico VR, Baofeng Mojing, Deepoon, and most of the smartphone manufacturers, generally retailing for somewhere between \$20 and \$100.

There are several factors that will contribute to the mass adoption of mobile VR. First, the quality of the relatively affordable mobile VR devices will improve substantially over time, as teething problems related to manufacturing new innovative products are overcome. Being able to enjoy a good quality mobile VR experience by purchasing a \$30 device will open a larger market.

Secondly, close to a third of smartphones still have very limited options for experiencing VR. Significantly, Apple has not yet released a VR device for its smartphones, which means more than 700 million smartphones cannot access meaningful VR content. Like all devices, iPhones work with Google Cardboard, but this is probably not the setup that most iPhone owners get excited about. Compatibility issues, such as the Daydream being incompatible with the latest Samsung Galaxy models, also need to be addressed as they unnecessarily hinder growth.

Finally, the increased availability of good quality content will be a key driver. Video formats have the potential to speed up the mass adoption of (mobile) VR. In addition to the obvious celebrity and nature themes, we expect sports and music events to play a key role in mass adoption. While there will be many mobile VR games, they will not likely be the content category that will monetize best. The natural fit between VR and events is illustrated by the 2017 Super Bowl, where viewers could watch VR highlights of the game following a partnership between Fox Sports and LiveLike. NBA fans, meanwhile, can watch a VR game every week on their Gear VR or Daydream headsets, with the experience described as "surprisingly good" and "with a future on the court" by Fortune. This VR content is currently being wrapped into existing subscription models, but once it becomes possible to buy access to a single experience or game in VR, the market will really take off. The current model limits the potential for the NBA, for instance, to tap into new audiences and revenue streams. This opportunity is huge within Western markets, but even bigger in Asia and particularly China, where Western sports are very popular.

MOST POPULAR SMARTPHONE & TABLET BRANDS

GLOBAL

Globally, there were 2.8 billion active smartphones in use at the end of 2016, more than half of which were in the Asia-Pacific region. Samsung and Apple were the two biggest manufacturers, with Samsung edging out Apple with 859 million active smartphones, or 31% of smartphones used globally. The global ranking of Chinese brands Huawei, Xiaomi, OPPO, and Vivo was mostly due to their performance in the Asia-Pacific market, especially China. Between 60% and 85% of the user base of these brands was in China. While Samsung was the most popular brand overall, Apple's iPhone 6 was the most active smartphone model globally last year. LG performed best across the Americas, with about 50% of all active LG smartphones in these two regions (28 million active smartphones in North America and 21 million in Latin America). Asia-Pacific and North America were the two biggest smartphone regions, and Apple ranked #1 in both.

Apple was the world's leading tablet brand, holding almost 64% of the market share with 165 million active devices at the end of 2016. Apple was also the #1 tablet manufacturer across each of the individual regions. Together, Apple and Samsung accounted for almost 90% of the global tablet market, leaving little room for other brands. The Asia-Pacific region is the largest tablet market, representing more than 80 million active tablets, with North America and Western Europe following with around 60 million active tablets each. The Apple iPad Air and Air 2 were the most popular tablet devices, accounting for almost one in five active tablets globally.

RANK	MANUFACTURER	ACTIVE SMARTPHONES	MARKET SHARE
1	SAMSUNG	859M	31%
2	APPLE	704M	25%
3	HUAWEI	205M	7%
4	XIAOMI	176M	6%
5	OPPO	152M	5%
6	VIVO	110M	4%
7	LG	93M	3%
8	SONY	79M	3%
9	MOTOROLA	76M	3%
10	LENOVO	50M	2%
2,772M			100%

TOP 10

SMARTPHONE BRANDS BY
MONTHLY ACTIVE DEVICES
2016 | iOS AND ANDROID
GLOBAL



TOP 5

TABLET BRANDS BY
MONTHLY ACTIVE DEVICES
2016 | iOS AND ANDROID
GLOBAL



RANK	MANUFACTURER	ACTIVE TABLETS	MARKET SHARE
1	APPLE	166M	64%
2	SAMSUNG	65M	25%
3	LENOVO	6.5M	2%
4	HUAWEI	5.8M	2%
5	ASUS	5.2M	2%
260M			100%

Based on the top 100 countries in terms of smartphone users, representing more than 98% of the world's smartphone population. Based on monthly active use at the end of 2016 (December 2016).

DEVICE SPECS

HOW DO TECHNICAL SPECS INFLUENCE YOUR GLOBAL STRATEGY?



GLOBAL
FEATURE
DEVICE
SPECS

The mobile market is increasingly global, but every country or region has its combination of features that makes it unique. Aside from the obvious language, cultural, and economic aspects, one major differentiator is the technical capabilities of the devices used. Technical specs, including the relative popularity of operating systems, play a key role in defining the market opportunity for apps and mobile services on a country-by-country basis.

The popularity of Android versus iOS is an important consideration, as iOS tends to be associated with wealthy and higher-spending consumers, while Android skews toward the young and more cost-conscious. Majority iOS markets, such as the U.S., Western Europe, and Japan, generate high revenues per device. Android majority markets offer huge growth potential, but also more challenges due to fragmentation and lower purchasing power. Fragmentation includes the many different versions of Android, with each manufacturer tweaking the operating system according to its preferences, the many different device types, and the diverse app distribution channels.

The popularity of Android versus iOS is not enough to assess market potential. The quality and power of mobile devices in use are at least as important. The share of high-spec devices in a market reflects consumers' purchasing power, and high-end device owners tend to spend more on apps. In South Korea, for example, Android is dominant because of Samsung, but the country has a very large share of high-end devices. Our app store intelligence shows that spending per device in South Korea is indeed very high compared to other Android-dominated markets.

A detailed look at Newzoo's Monetization Metrics by type of device, powered by our partner deltaDNA, further supports our view that high-end devices monetize better, as illustrated by the conversion rates of premium devices such as the Galaxy S7 and the iPhone 7 Plus. Finally, as most iPads in use are more than three years old, understanding device specs is important in this case too.

CONVERSION RATE FOR APPLE & SAMSUNG

FLAGSHIP DEVICES | 2017

DEVICE	CONVERSION RATE
APPLE IPHONE 7 PLUS	4.6%
APPLE IPHONE 7	3.2%
APPLE IPHONE 6S PLUS	2.9%
APPLE IPHONE 6S	2.3%
APPLE IPHONE 6	2.5%
SAMSUNG GALAXY S7 EDGE	3.4%
SAMSUNG GALAXY S7	3.4%
SAMSUNG GALAXY S6 EDGE	2.9%
SAMSUNG GALAXY S6	2.4%

Data provided by deltaDNA. Conversion rate equals the share of players that have converted to spending money at least once for an average free-to-play game.

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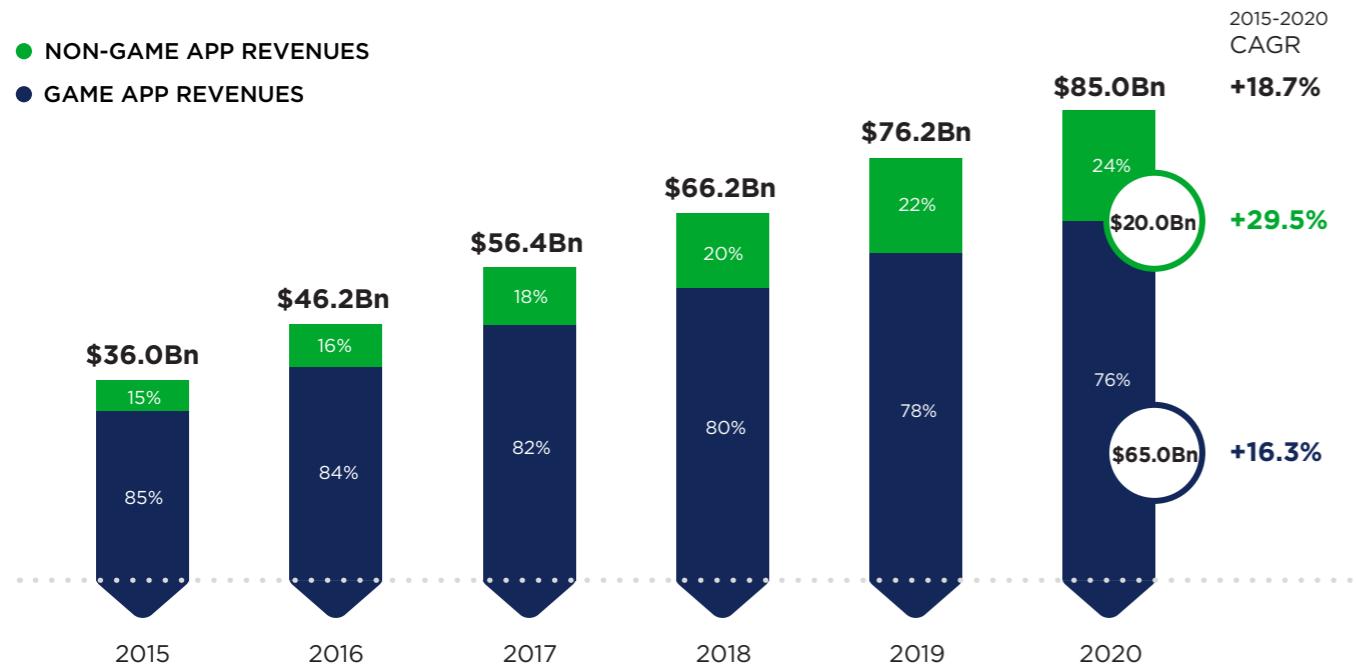
APP STORE REVENUE FORECAST

GLOBAL

APP STORE REVENUES | GAME & NON-GAME SPLIT

GLOBAL | 2015-2020

- NON-GAME APP REVENUES
- GAME APP REVENUES



Global app store revenues are poised for strong growth in the coming years. As the number of smartphone users increases from 2.1 billion in 2015 to 3.6 billion in 2020, the potential for apps to monetize their services through different app stores will also expand. We estimate that revenues from games within the app stores will grow from \$30.5 billion in 2015 to \$65.0 billion in 2020, a CAGR of +16.3%. Most of this growth will come from Asia-Pacific and the Middle East and Africa, while more mature markets of North America and Europe will continue to grow at a lower but stable rate.

Revenues from non-gaming services will grow dramatically, as companies figure out the best way to monetize their services through apps and the app stores. Total revenues from the non-gaming segment are set to increase from \$5.5 billion in 2015 to \$20.0 billion in 2020, a CAGR of +29.5%. We estimate these revenues to grow healthily across the board, in developing and mature markets alike.

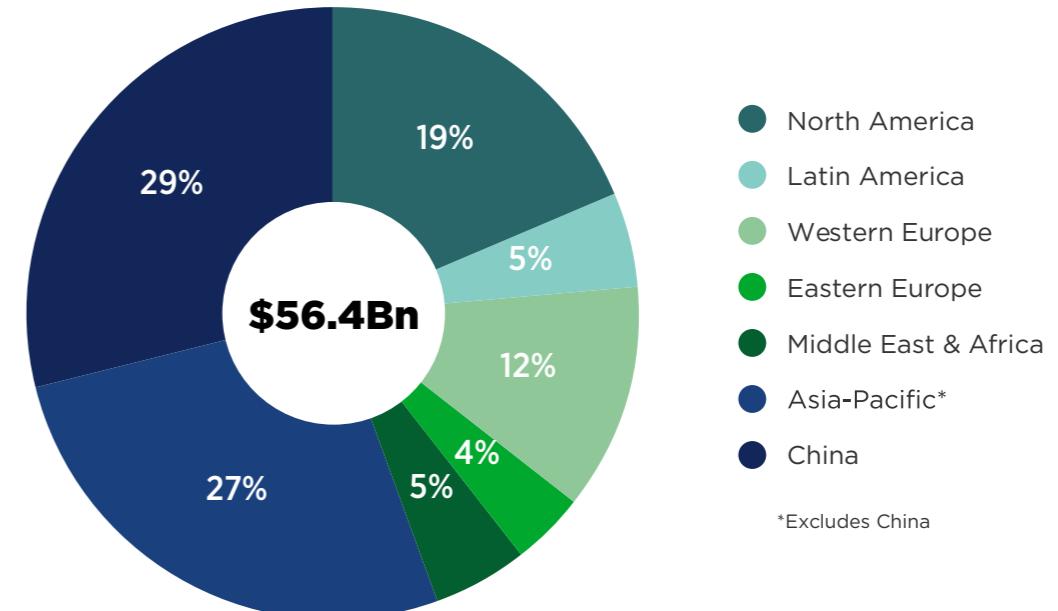


FULL REPORT INCLUDES THIS DATA FOR 6 REGIONS
WITH SPECIAL FOCUS ON CHINA & INDIA

In 2017, direct consumer spending in the global app market will jump to \$56.4 billion, a year-on-year growth of 22%. Of these revenues, 82% will come from mobile games (\$46.1 billion), while \$10.3 billion will come from non-game apps and services. China, the world's biggest mobile market, will account for more than 29% of total revenues (\$16.4 billion). It will also account for more than 50% of all app revenues in Asia-Pacific, which will total \$15.5 billion. Meanwhile, North America's lucrative market will generate another \$10.6 billion in 2017, while European consumers will spend \$8.5 billion.

APP STORE REVENUES | PER REGION

GLOBAL | 2017



*Excludes China

APP STORES: THE END OF AN ERA?

APP DISTRIBUTION BEYOND THE APP STORE AND GOOGLE PLAY



GLOBAL
FEATURE
THE END
OF AN ERA

Outside of China, Apple's App Store and Google Play have been the major distribution channels for most mobile app developers over the past decade. However, it is becoming increasingly apparent that a new era is dawning, one in which app distribution no longer depends almost entirely on a duopoly enjoyed by Apple and Google. It is not surprising that these stores are attracting increasing competition, having earned \$6 billion and \$4 billion in gaming revenues in 2016, respectively, through their 30% app store cut (see newzoo.com/top-25-companies-2016).

There are three complementary drivers of change. The first is the impact of (international) politics on the reach of the two main global stores. The second is the increased competition from other stores with a similar business model and from alternative distribution models, such as direct downloads from websites. The third is innovation, undermining the established business model of the dominant app stores.

China is the main example of political impact; the ban on Google Play in the Chinese market has allowed independent Android stores to flourish, despite the segment being fiercely competitive. Android accounts for 72.5% of devices in China, and 61.5% in terms of revenues. Even if Google Play could operate in China, it would be very difficult for it to gain a meaningful market share, as the competing stores have developed a huge lead and are fully localized. Nevertheless, the market remains very fragmented. Analysis by Newzoo and our partner TalkingData indicates that any developer wishing to reach 80% of the Android market in January 2017 must release its app on at least five stores: Myapp, 360 Mobile Assistant, Baidu Mobile Assistant, Xiaomi App Store, and Huawei's store.

Politics can also indirectly influence the reach of Google Play and the App Store. In Iran, local app store Café Bazaar has carved out a defensible niche for itself by filling a void left by Google and Apple, as Iran is a country where American firms tread carefully due to political sensitivities at home.

The second driver of change comes from increased competition from newcomers with similar business models and firms using alternative distribution. The most threatening ones in the Western markets are perhaps Amazon and Facebook. While Facebook Messenger's Instant Games currently only distributes free mobile games, the presence of a store within an app can pose a threat. Further competition is coming from increasingly common alternative distribution, especially in Asian emerging markets. Publishers are keen to avoid app store fees by promoting direct downloads of APK files to Android users, of which Garena in Southeast Asia and NetEase in China are two examples.

Increased competition may also come from platform-on-platform businesses, such as Line and Kakao. Currently, they often only add another layer of marketing costs to app developers, sometimes taking total distributions costs to more than 50% of gross revenues. Their huge marketing and distribution power in specific markets can justify this, but the benefit of reducing these costs is equally huge. The question is whether it will be publishers abandoning platform-on-platform propositions, or firms like Line and Kakao side-stepping app stores, or something else altogether.

The third and final driver of change in the mobile distribution market is further innovation. Initiatives like Amazon Underground, which pays developers for every minute their game is played by users, and Hatch, which allows players to stream premium games in return for a monthly subscription or advertisements, are both encouraging premium developers to reduce their App Store and Google Play dependencies.

The changing nature of apps is potentially even more important. The arrival of Google's Instant Apps for Android, in which Google enables access to content contained within apps without installing them, deliberately blurs the line between the mobile web and fenced-off applications. It helps users access app functions that they only need occasionally (for example, booking a last-minute hotel room) directly through search in a mobile browser. Tencent has launched similar "mini-programs" in China for WeChat.

In summary, the long-established dominance of both stores is under threat on several fronts. This could lead to sharply reduced fees, as Apple already did for ongoing subscription fees. App stores could become more of a utility with a different business model, charging a modest distribution fee, while generating revenues primarily through promotions and advertising.

APP FEATURE



APTOIDE

Aptoide is a third-party Android app store that allows companies or individuals to provide their own selection of apps using a syndicated infrastructure. For instance, operators and OEMs can partner with Aptoide to deliver relevant local apps in a polished way. In return, Aptoide receives revenue share for any advertising or purchase revenue generated by these apps.

ABOUT NEWZOO

3



GET THE REAL DEAL

SUBSCRIBE TO OUR GLOBAL MOBILE MARKET REPORT

KEY TOPICS & DATA POINTS

- GLOBAL MOBILE MARKET (2015-2020):
GLOBAL & SIX REGIONS WITH SPECIAL COUNTRY FOCUS: INDIA & CHINA
- KEY TRENDS (E.G., VR, AR, MOBILE PAYMENTS, FUTURE OF APP STORES)
- RANKINGS: TOP 50 COUNTRIES BY SMARTPHONE USERS & PENETRATION
- TERMINOLOGY & METHODOLOGY

REGION SCOPE

- NORTH AMERICA
- LATIN AMERICA
- EASTERN EUROPE
- WESTERN EUROPE
- MIDDLE EAST & AFRICA
- ASIA-PACIFIC



6 REGIONS

ANALYSIS SUPPORT



JELLE KOOISTRA

Head of Mobile



BERND VEN DER WIELEN

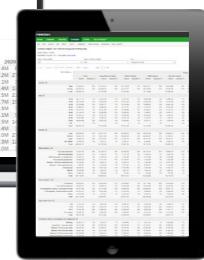
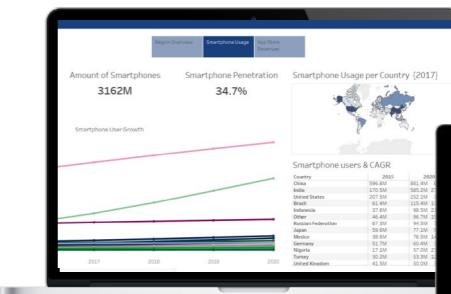
Data Analyst



SCOTT JANSE

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ONLINE DASHBOARD & DATASETS



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WORKING WITH US

We are not consultants. We provide direct access to market intelligence scoped to the needs of our clients. Our analysis support and expertise are an integral part of our subscriptions.



**STANDARD
SUBSCRIPTIONS**

These are our standard data and report services. Reporting varies from quarterly PDF reports to monthly Tableau or XLS files to continuous dashboard access, including support.

STARTING AT \$10K



**ONE-OFF
PROJECTS**

Custom combination of intelligence and analysis support required to make smart investment, strategic, marketing, or product development decisions.

STARTING AT \$25K



**CUSTOM
TRACKERS**

Track companies, markets, categories, and products on a monthly basis using the most relevant combination of data from our intelligence suite.

STARTING AT \$50K



**PARTNER
MODEL**

The ultimate subscription model allowing continuous support of various needs with practically unlimited access to our global market intelligence.

STARTING AT \$100K

OUR GLOBAL PARTNERS

THE BEST OF BREED IN THEIR SPECIALTY FIELDS

Newzoo's Mobile Intelligence suite is powered by proprietary models, algorithms, and predictive analytics that combine numerous sources of data, including aggregated tracking data from our strategic partners, global leaders in their respective fields. These partners are also involved in performing custom projects that are outside of the scope of standard products.

WORLD-LEADING STRATEGIC PARTNERS



TalkingData is China's largest independent Smart Data service platform that focuses on the mobile app marketplace. TalkingData provides best-in-class Smart Data products and services, such as mobile app analytics, mobile ad tracking, mobile game analytics, mobile market intelligence, DMP (Data Management Platform), and industry consulting.

www.talkingdata.com



PRIORI DATA
Quantify the app economy.

Priori Data is an App Store Intelligence company providing comprehensive market data and competitive benchmarking information on the global app economy. Priori Data provides key metrics such as app revenue, downloads, and ranks on more than 3 million apps across more than 55 international markets.

www.prioridata.com



DeltaDNA is the games industry's leading real-time analytics and marketing platform. It is the only platform to provide a complete view of players' in-app purchase and ad monetization engagement. Its services allows developers to maximize engagement and lifetime value through player segmentation, predictive modelling, and real-time targeted interventions.

www.deltadna.com



Pushwoosh, with five years of expertise in push notifications technology, sends over 10 billion push notifications per month and reaches more than 1.2 billion devices, making it a global leader in the push notifications market. The firm has built solid relationships with more than 50,000 clients and more than 100,000 apps receive push messages powered by Pushwoosh.

www.pushwoosh.com



SafeDK is a complete mobile SDK management platform, enabling app publishers to monitor and control mobile SDKs in real time, allowing them to build better and safer apps. SafeDK is the only solution that covers the entire span of the app development cycle, from finding the top rated SDKs to ongoing monitoring and real-time control of the SDKs.

<http://www.safedk.com/>

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