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GDC Mobile/Handheld

Publishing Mobile Games in a multi-platform, multi-store environment

by Maarten Noyons
NCC Partners
and founder of the IMGA

THINK SERVICES
A DIVISION OF UNITED BUSINESS MEDIA LLC

GDC 10

www.GDConf.com

Who I am

- Maarten Noyons CEO of Noyons Content Consultancy (NCC)
- advises Media Companies, Content Houses, Operators, handset manufacturers and government organisations,
- creates the International Mobile Gaming Awards in 2004, the largest competition for Mobile Games in the World
- creates the Playground festival for Real World Games in Marseille, France

Contents

- Key figures of the Mobile Games Market,
- The key issues,
- Overview of the different paths to the consumer,
- Analysis,
- Recommendations and your questions

Key Figures

- Installed Base
- Operating Systems and Platforms
- App Stores
- Trends

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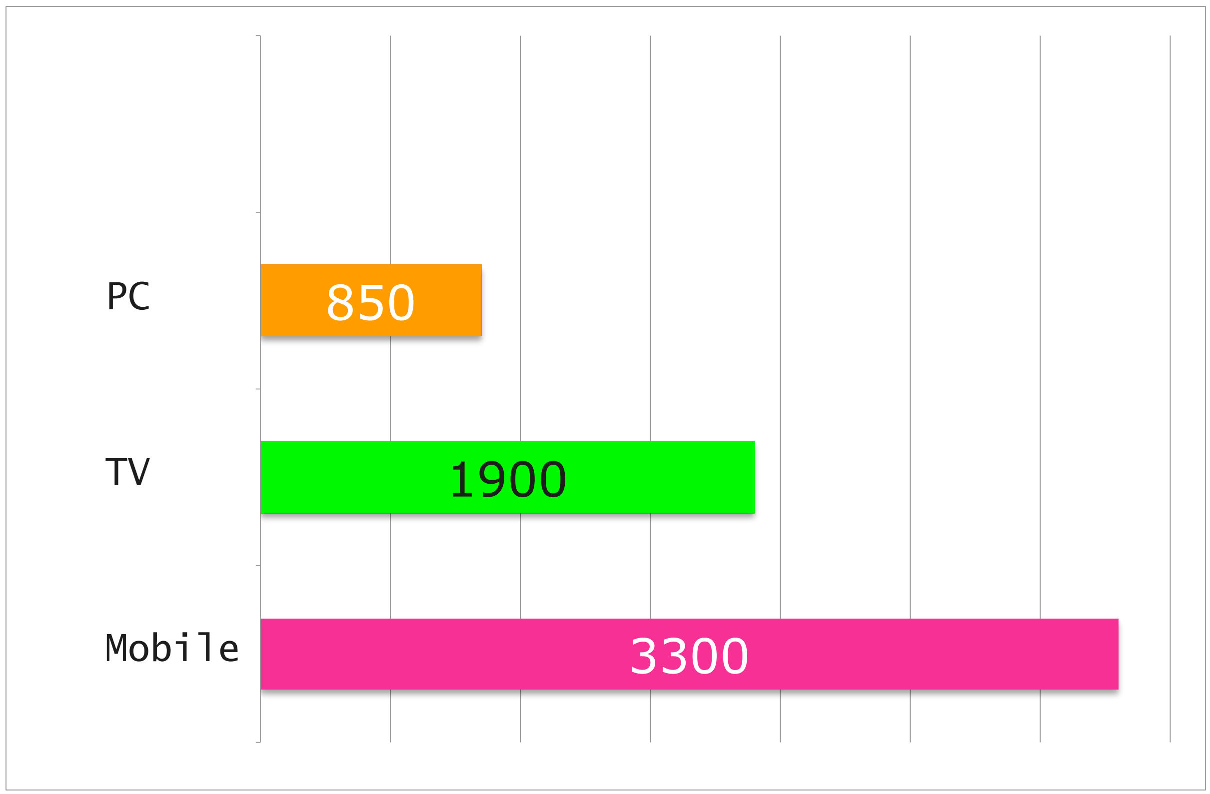
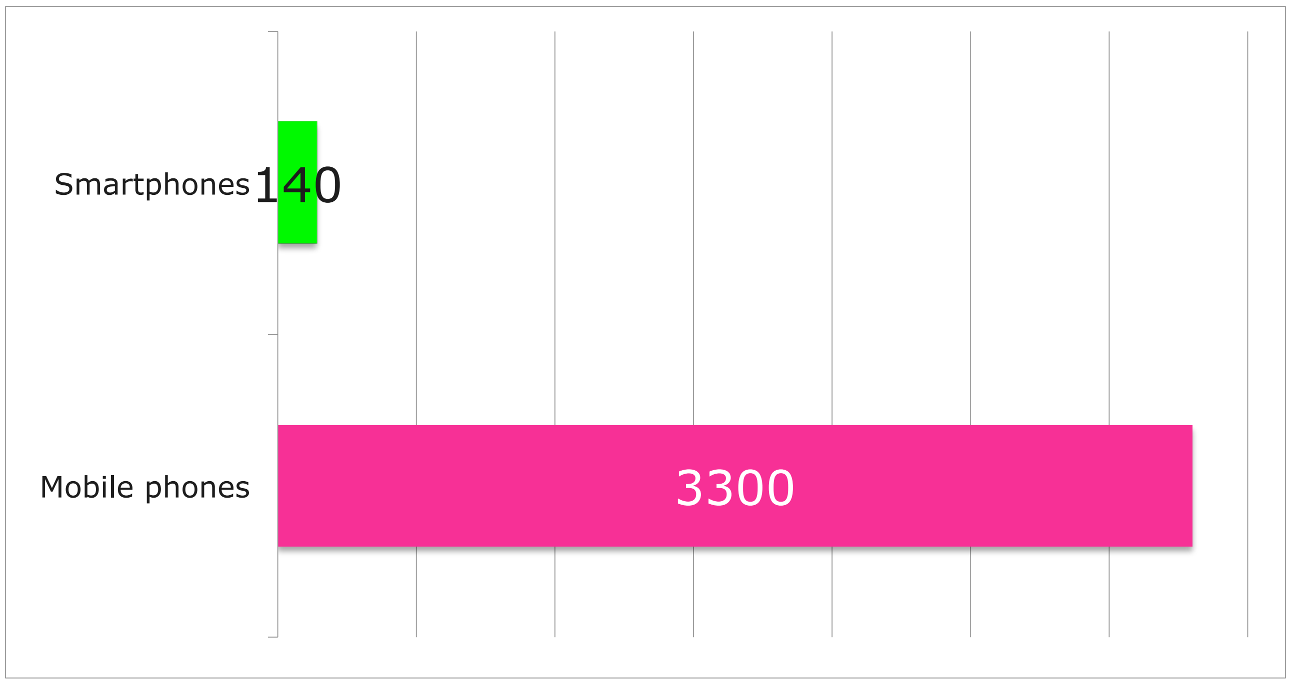
Installed base, worldwide

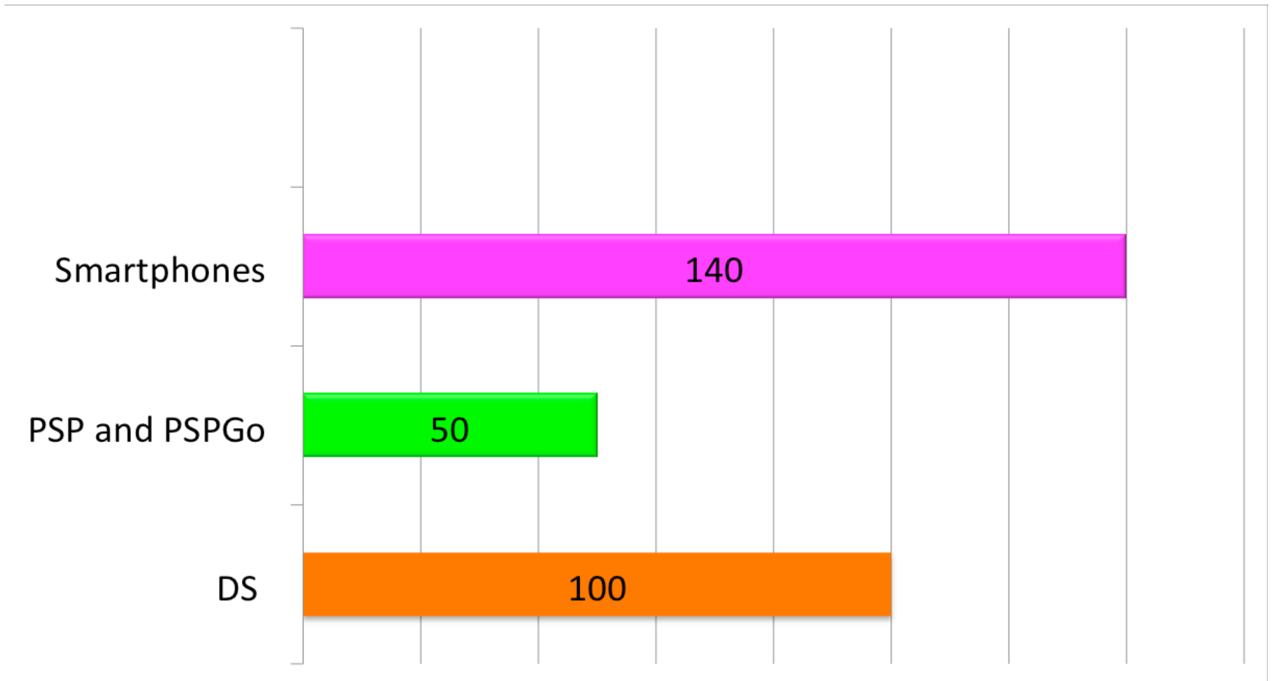


Source: Screendigest, Gartner, GSMA

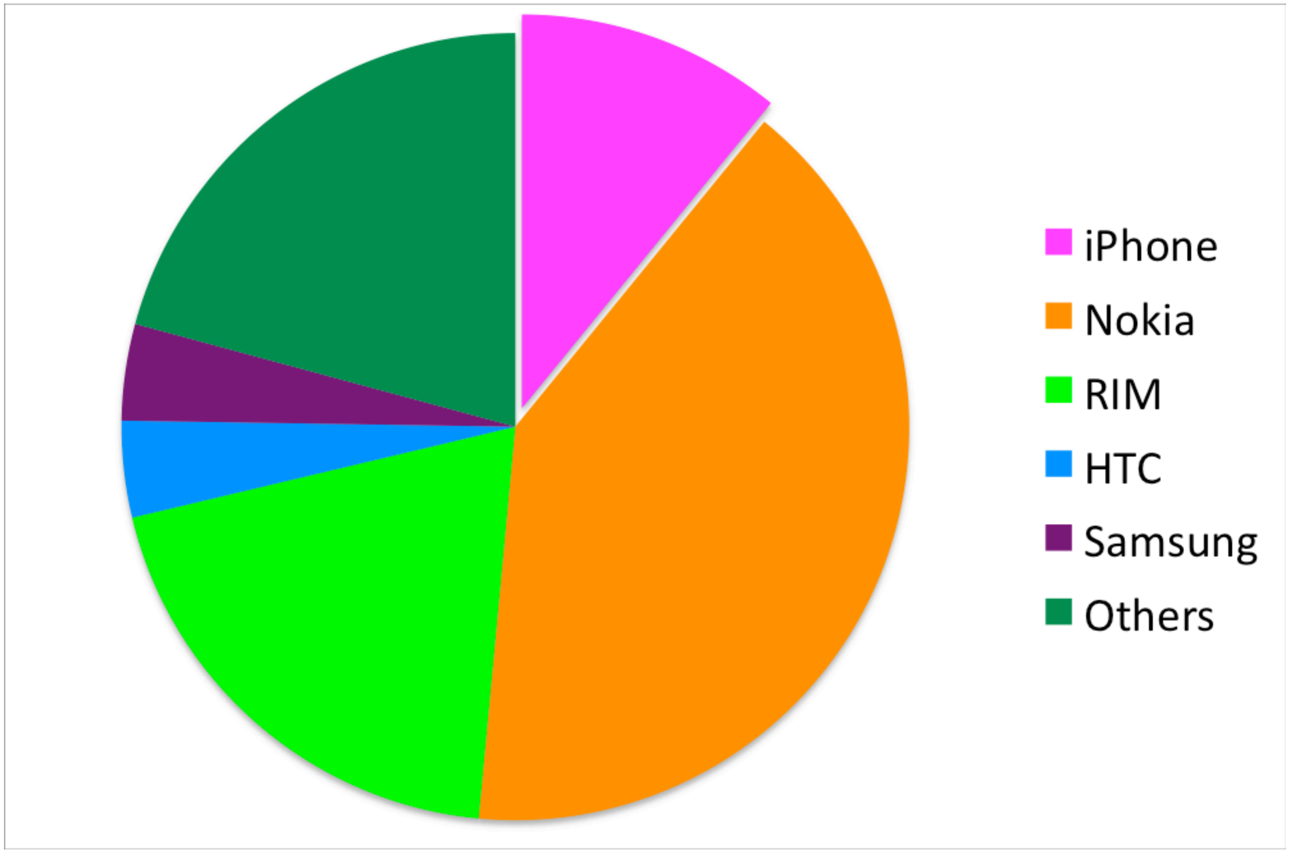
Smartphones shipped as a percentage of all mobile phones worldwide (in Mln.)



Smartphones and handheld installed base

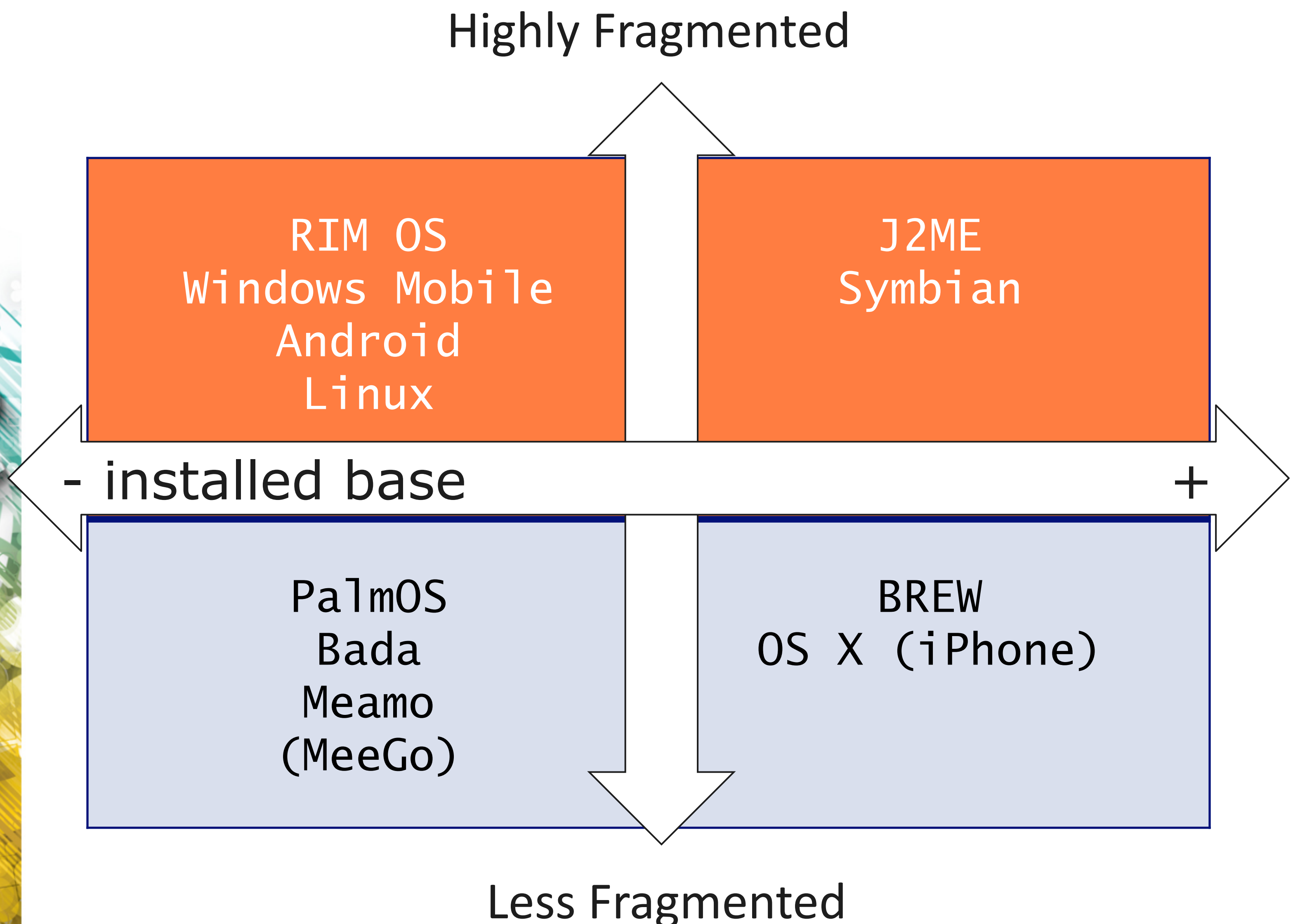


Smartphone market shares

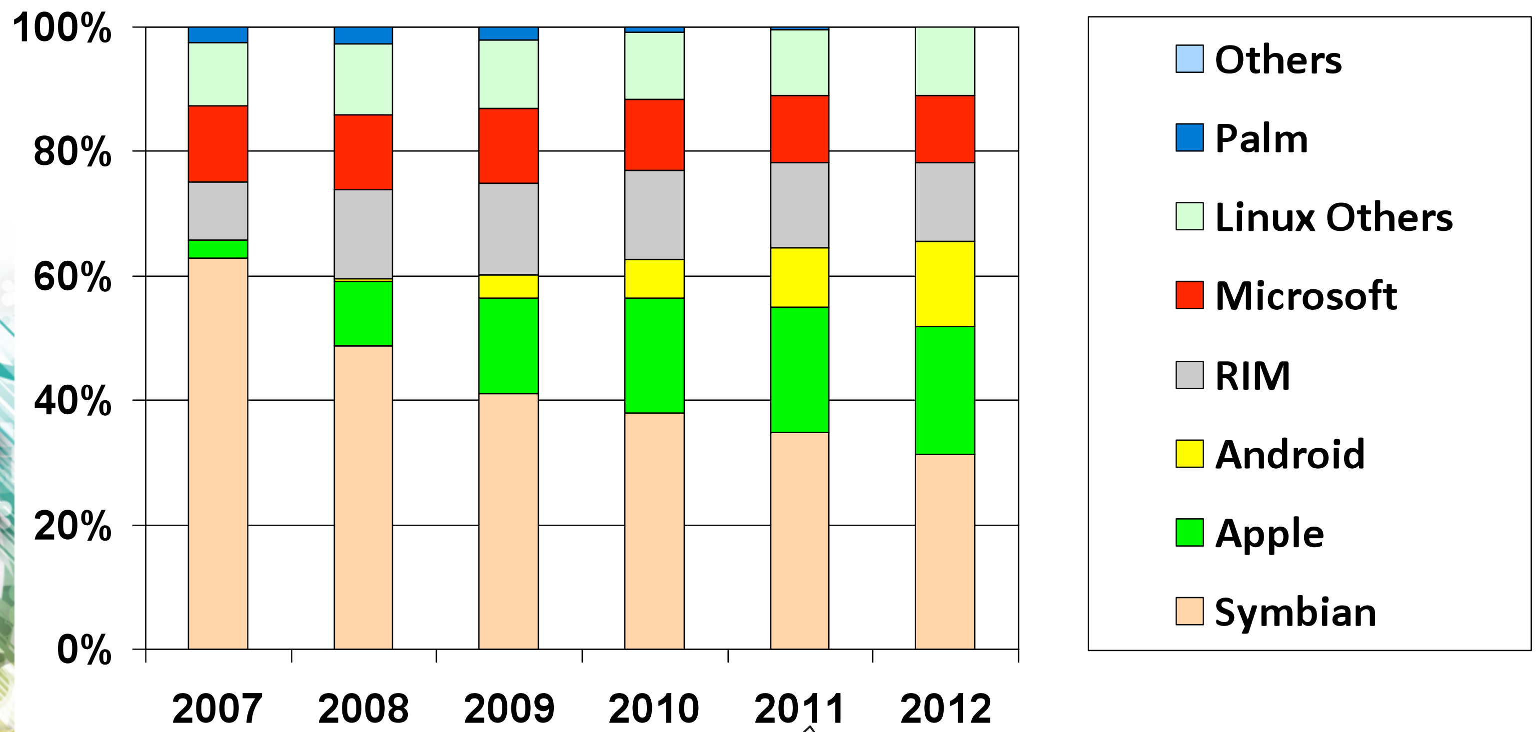


12+ Operating Systems

J2ME	SUN, now Oracle
BREW	Qualcomm
Linux	Open Source
Maemo	Nokia, Linux based
Android	Google, multi-OEM
Bada	Samsung, Linux based
Windows Mobile	Microsoft
PalmOS	Palm
OS X (iPhone)	Apple
Symbian	Symbian Foundation
MeeGo	Intel and Nokia
RIM OS	Research in Motion


Highly Fragmented
RIM OS
Windows Mobile
Android
Linux
J2ME
Symbian
- installed base
+
PalmOS
Bada
Meamo
(MeeGo)
BREW
OS X (iPhone)
Less Fragmented

Global Smartphone OS Share



In Q3 2011 we could start seeing the presence of MeeGo and Bada

Source: Strategy Analytics

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History of App stores

‘99 ’00 ’01 ’02 ’07 ‘08

Launch of *N-Gage store*
Launch of the *App Store*

Announcement of *Joint Innovation Lab*

Vodafone live !

NTT DoCoMo's *iAppli* Store

BREW launch in South Korea + roll out

Launch of *Les Games* by French MNO Orange

Launch of Handango

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'09

OEM Store launches

Ovi Store	Nokia
App World	Blackberry
Android Market	Various MNO's
Play Now	Sony Ericsson
SamsungApps	Samsung
Shop for Apps	Motorola
LG Application Store	LG

‘09

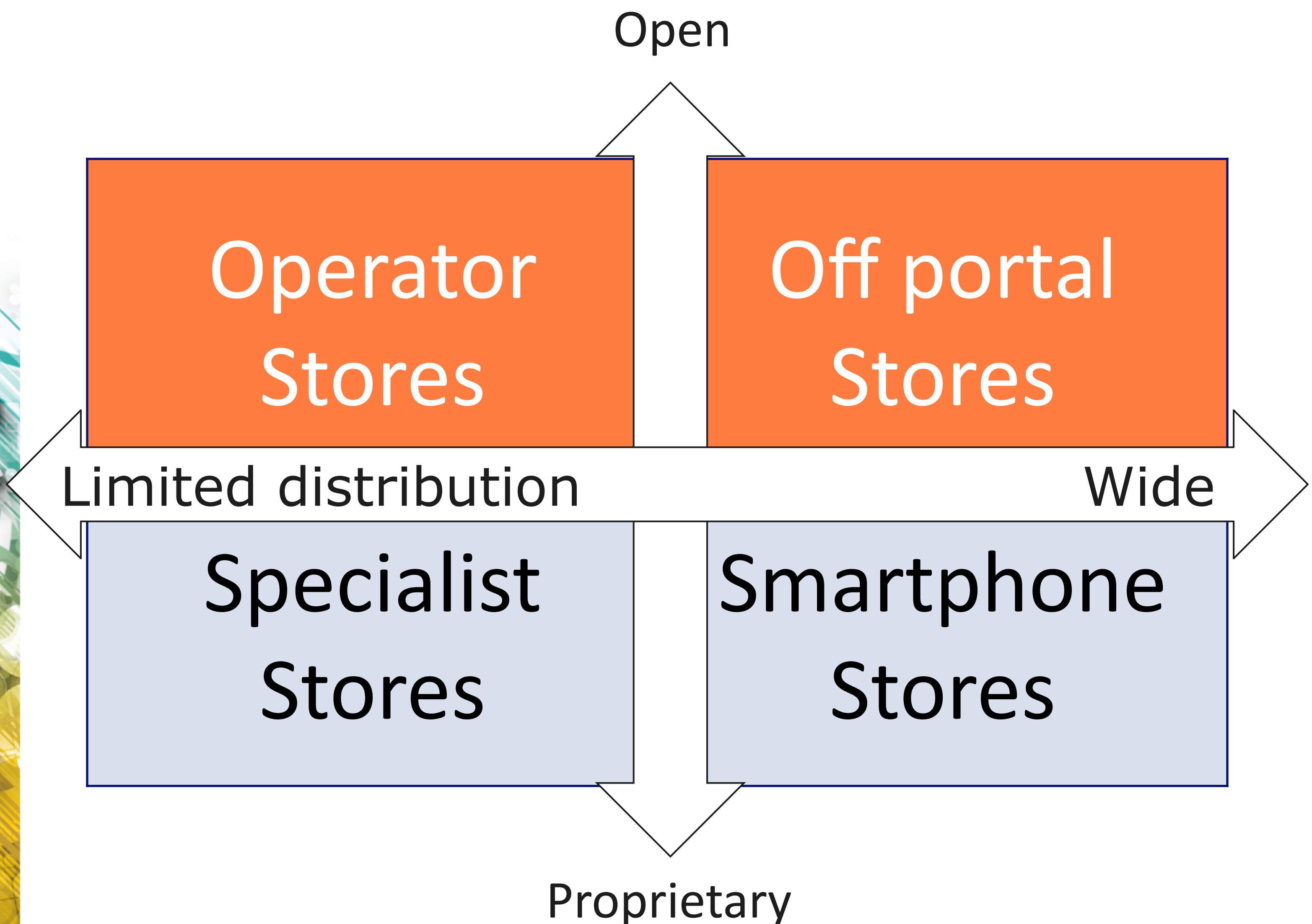
Operator Store launches

Vodafone 360	Vodafone
App Shop	Orange
MMarket	China Mobile
Web2go	T-Mobile US
TIM Apps store	TIM (Brasil)
App Store	Aircel
Digital Lounge	Sprint

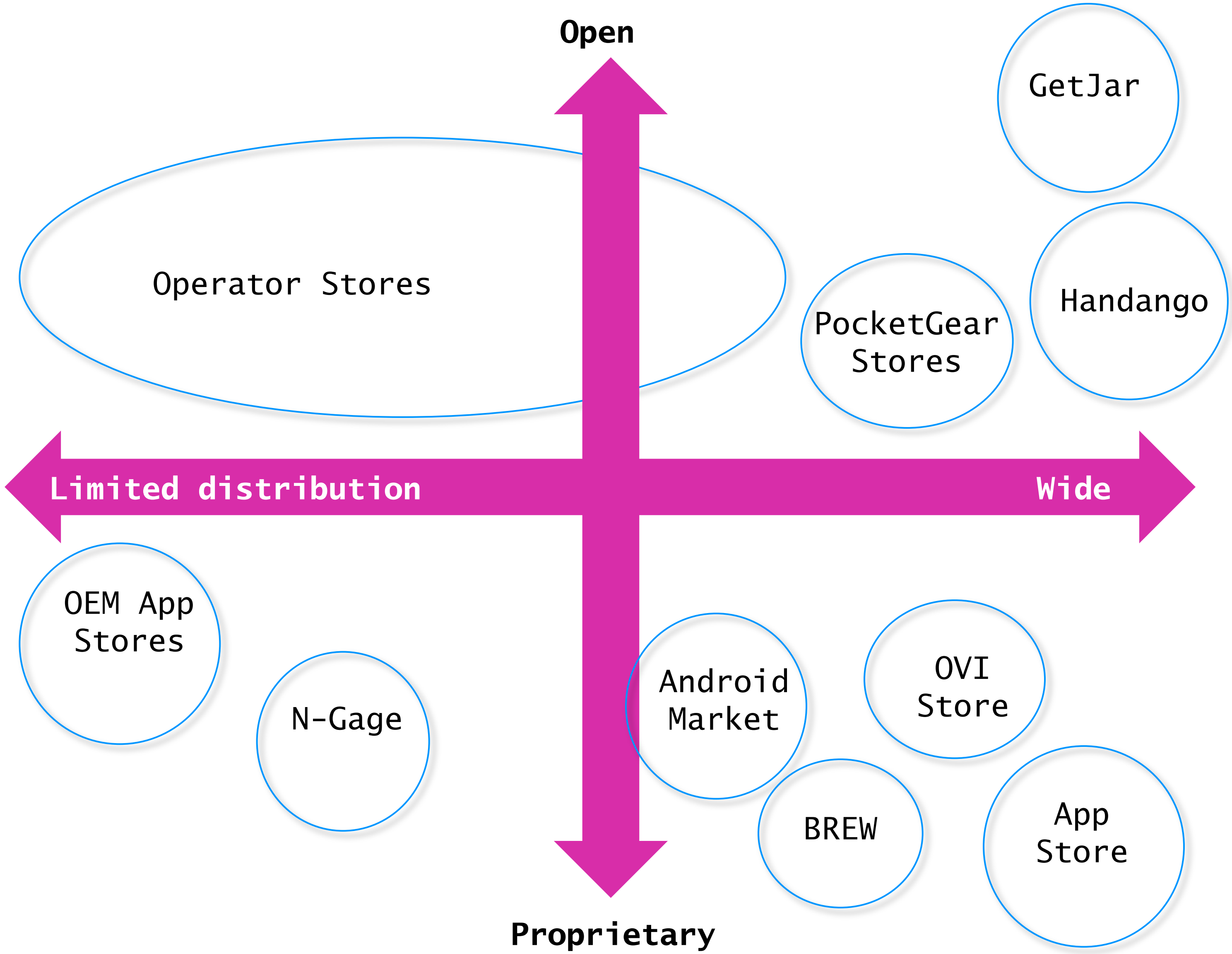
'10

And:

Intel App developer, Archos' Appslib, AndAppStore, Openmarket, Handster, the recent merger PocketGear and Handango, JavaAppStore and new players to enter this year: Ebay, PayPal, Amazon, Yahoo.

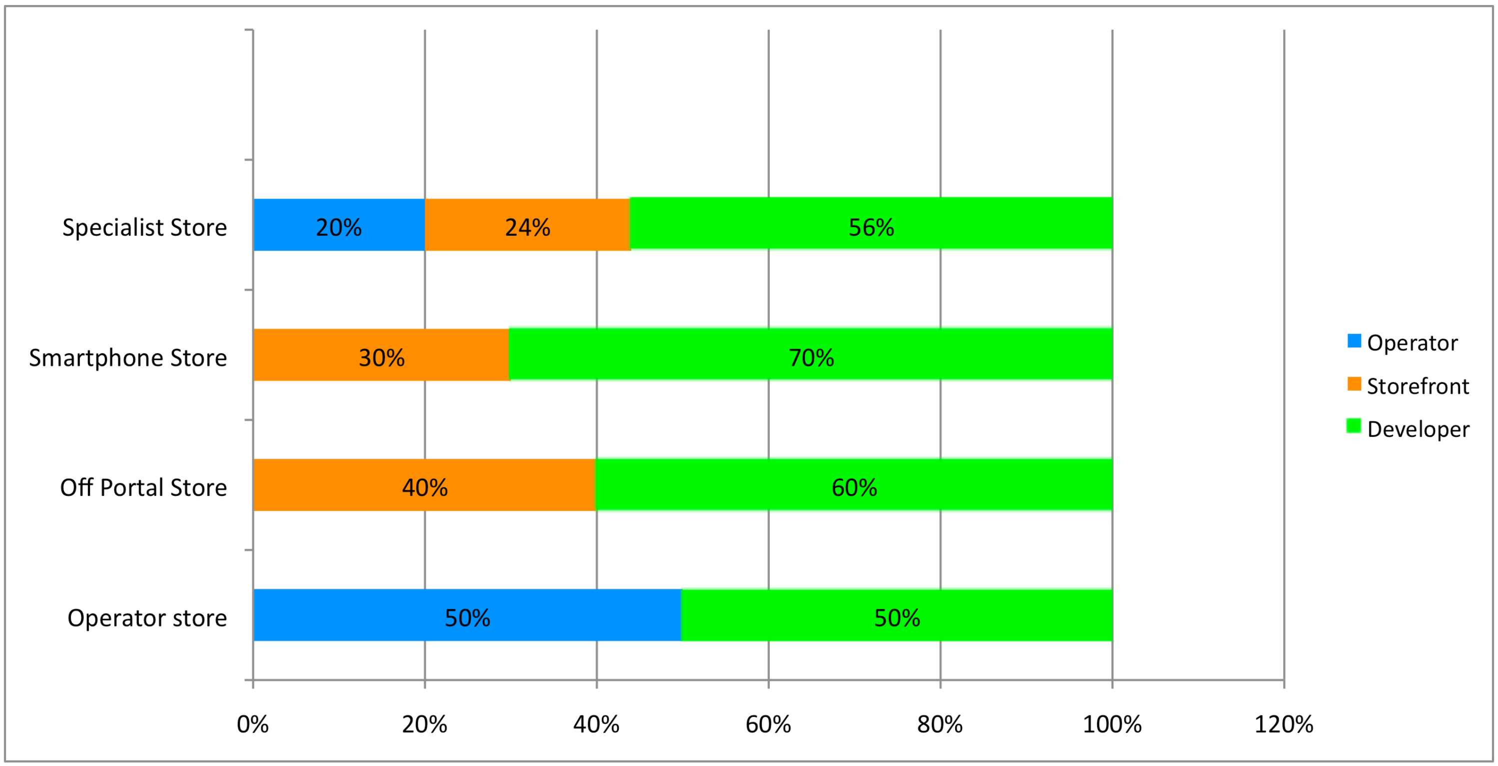


Source: Strategy Analytics



Source: Strategy Analytics

Revenue sharing for the 4 categories



Source: Strategy Analytics

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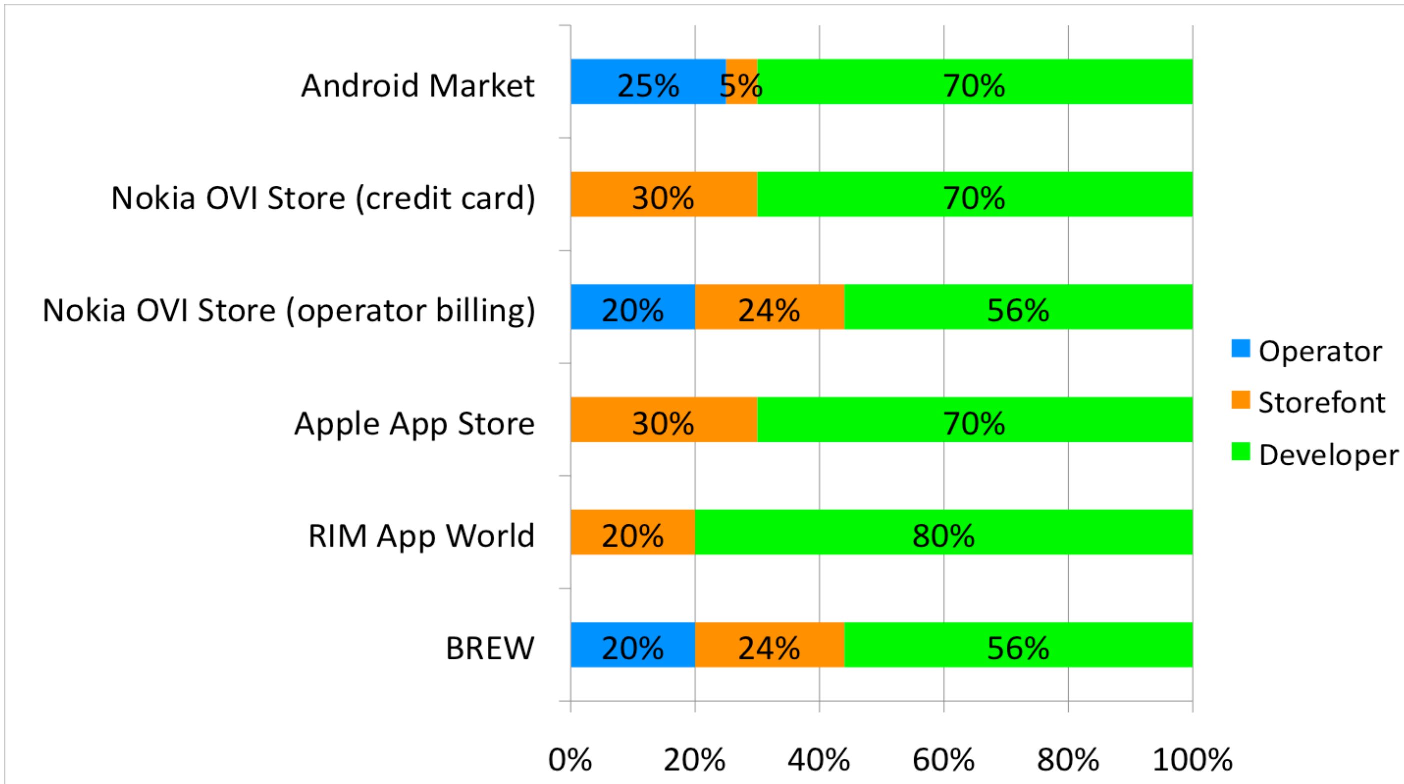
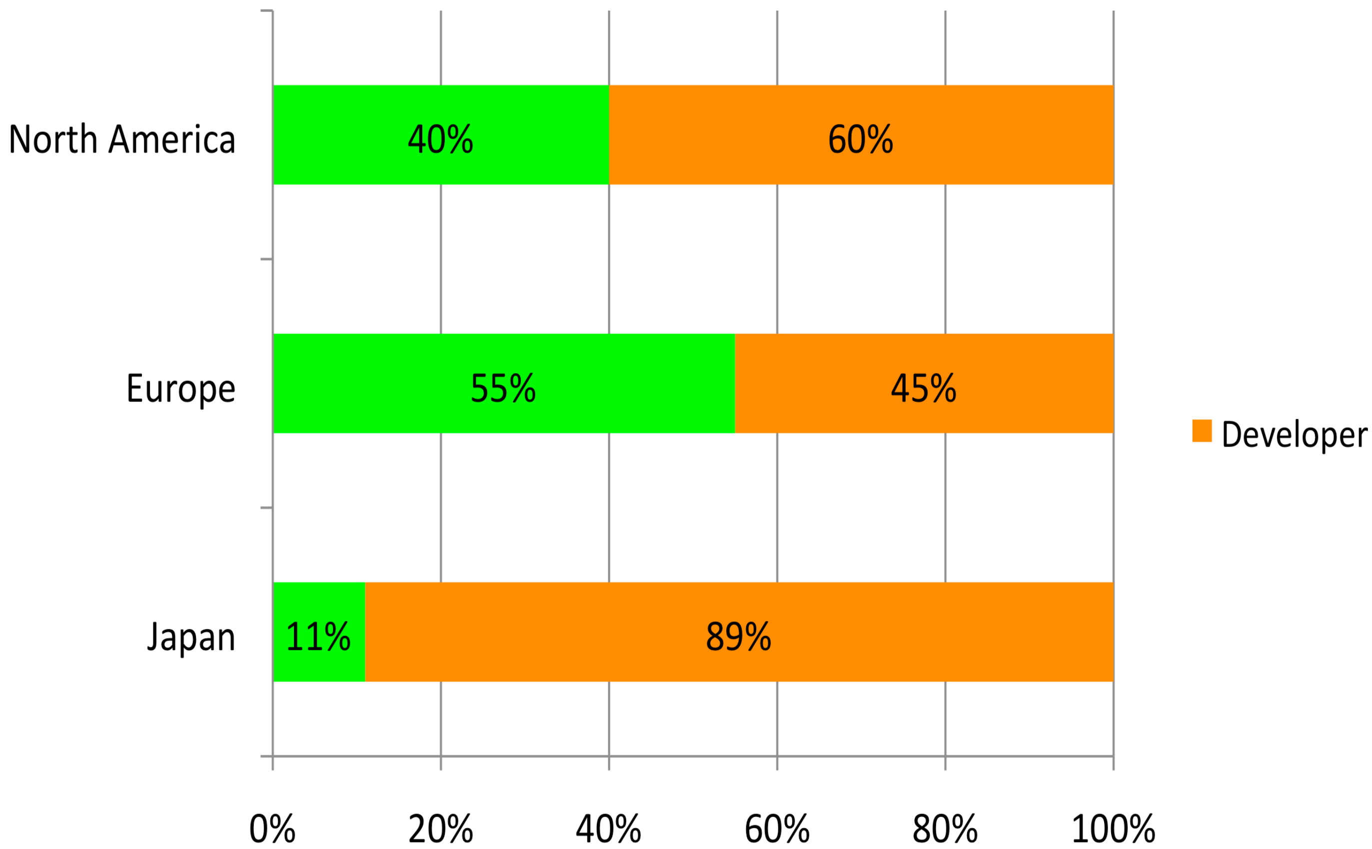
Revenue sharing for the App stores



Source: Strategy Analytics



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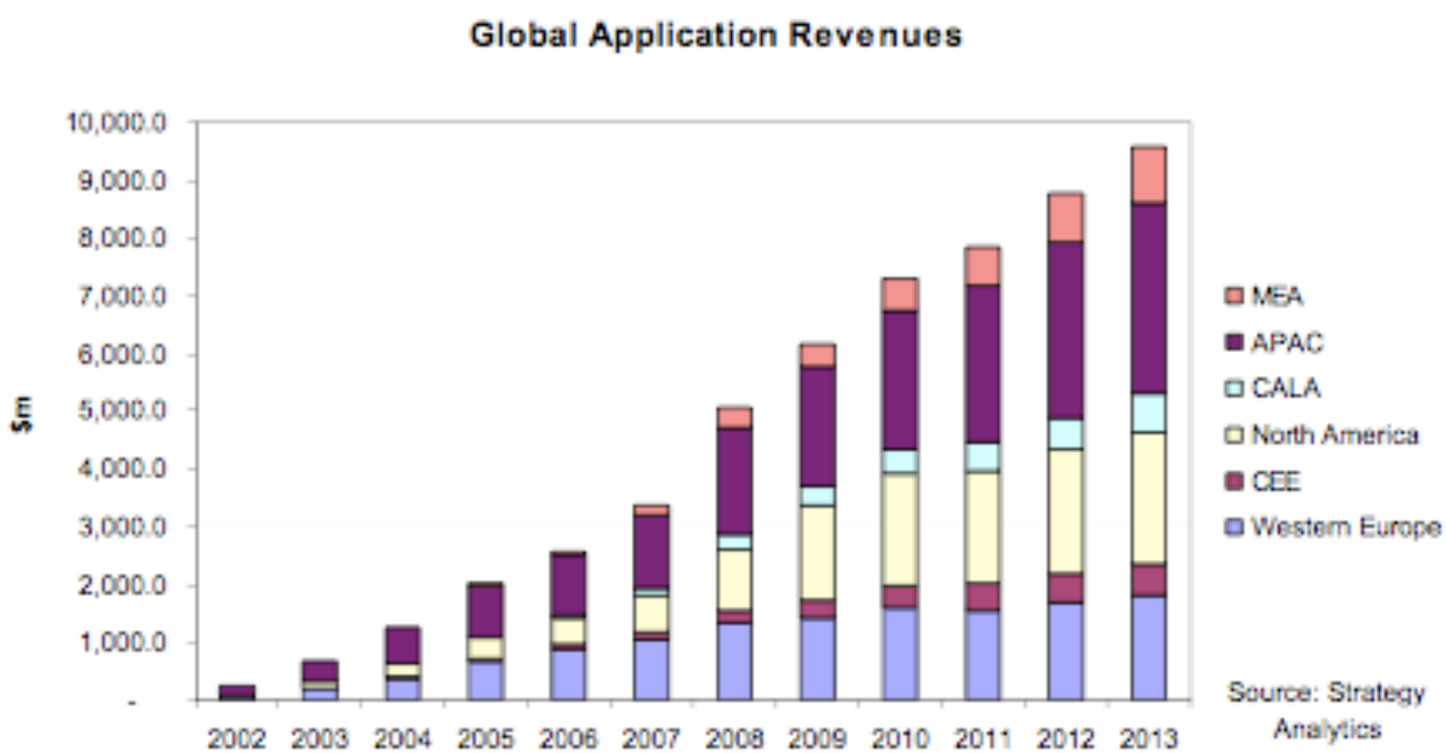
Global Application Revenues
$m
10,000.0
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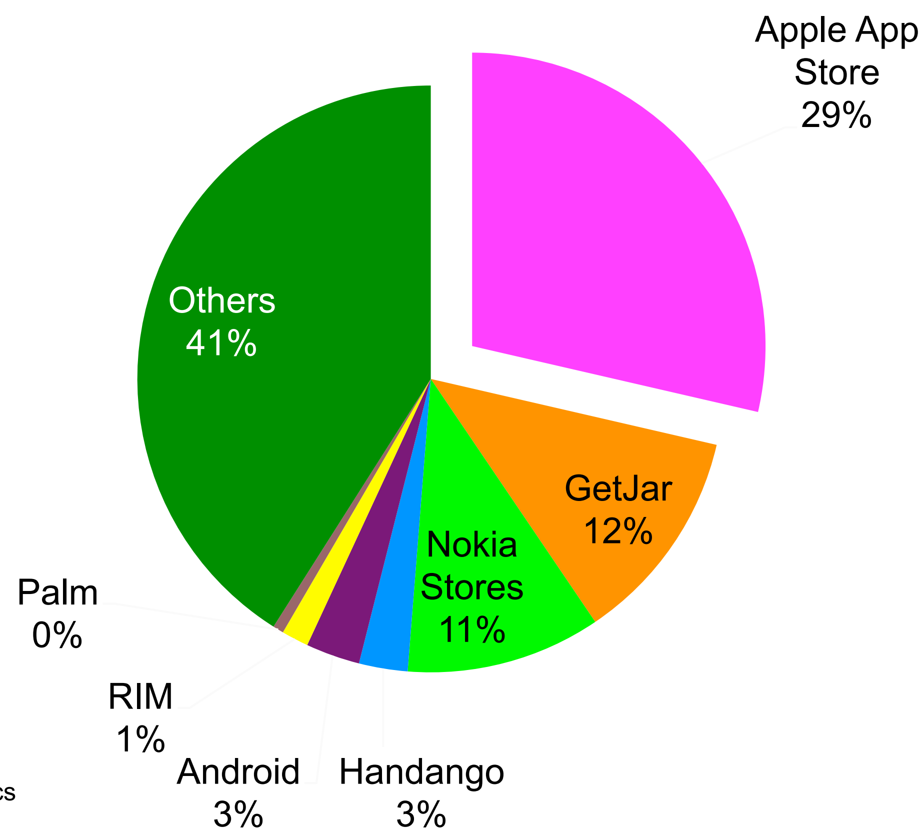
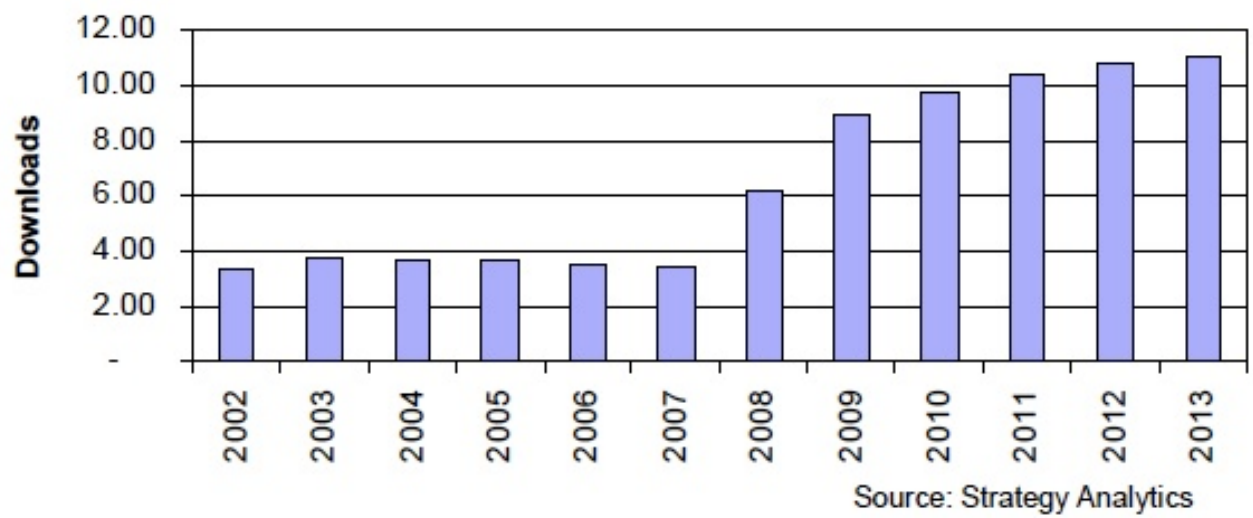
8,000.0
7,000.0
6,000.0
5,000.0
4,000.0
3,000.0
2,000.0
1,000.0
-
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
MEA
APAC
CALA
North America
CEE
Western Europe
Source: Strategy Analytics

App Stores: Volume Market Share first Half 2009

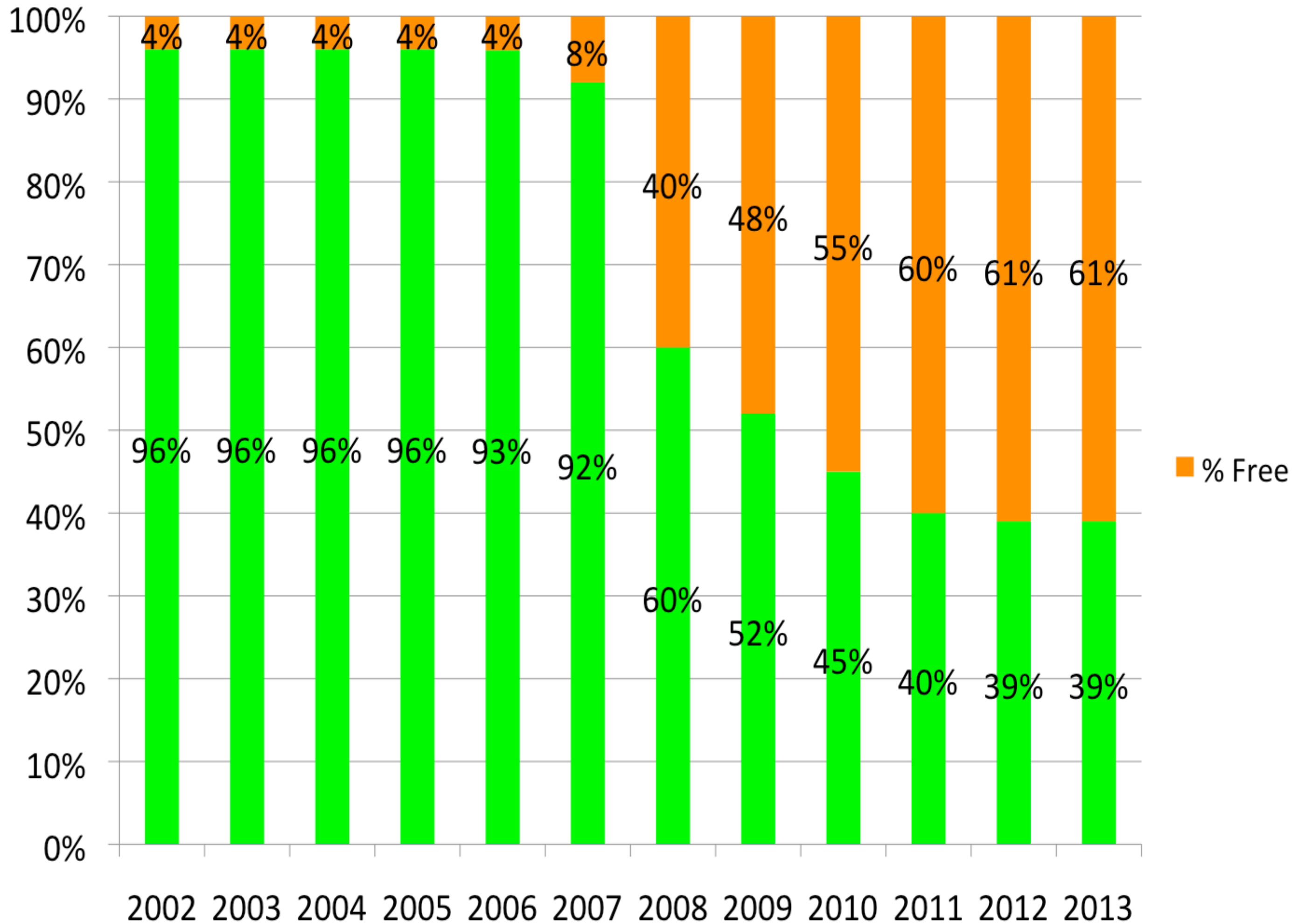


Source: Strategy Analytics

Annual applications : downloads / user



Pricing : free versus paid



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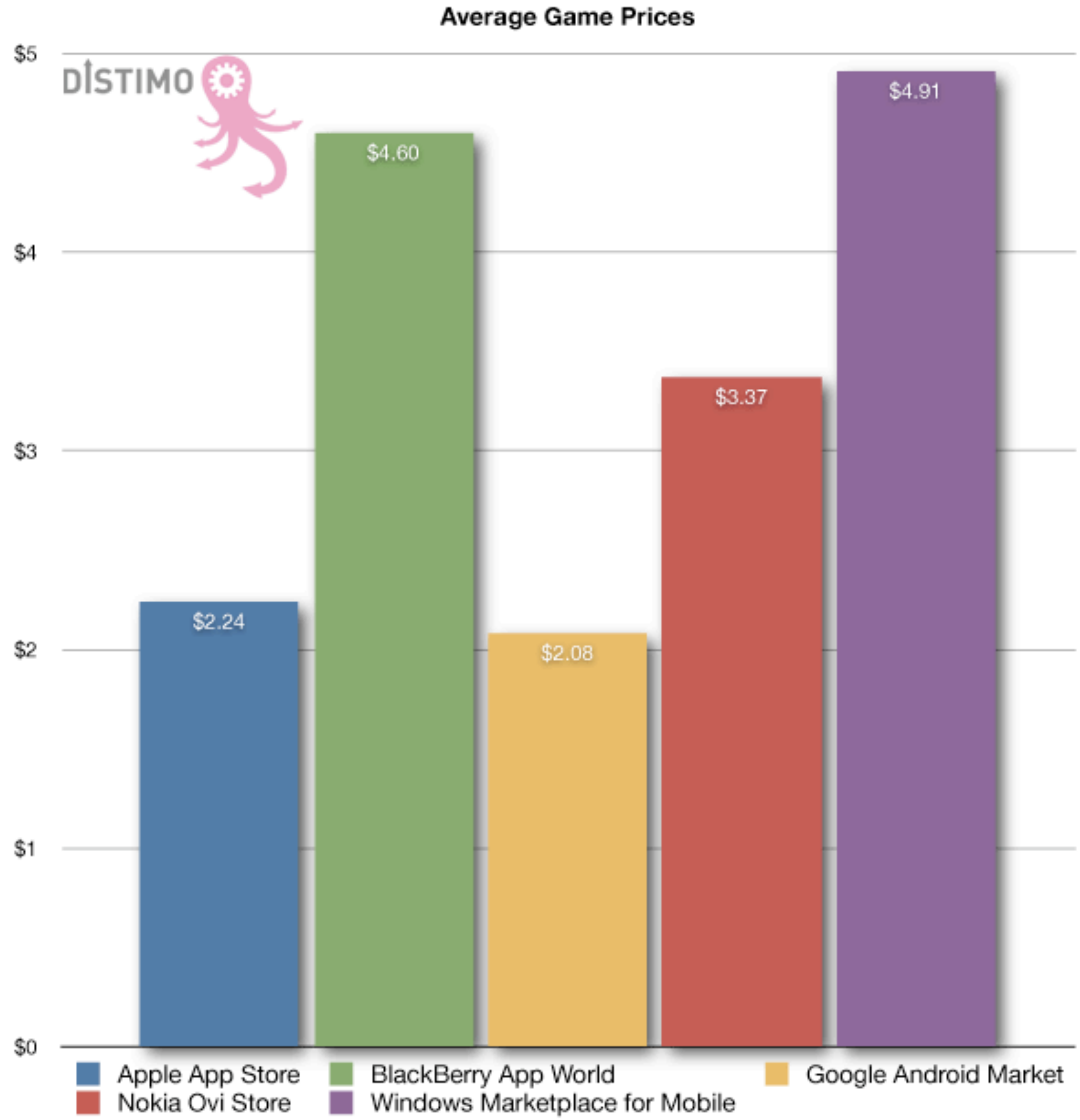

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Key Issues

- ROI
- Fragmentation related costs
- Marketing

ROI of a App Store

- % of revenue share
- Installed Base
- Fragmentation
- Price per App
- Payment mechanism
- Volumes of sales
- Marketing
- Geographic spread of consumers
- Time to Market
- Competition other apps.
- Ease of Use for Consumer (search, ergonomics,..)
- Audience profiles
- Piracy and Policing

Fragmentation Related Costs

- Ask yourself the ROI question
- There are affordable solutions in the market:
  - Ideaworks3D, Polarbit, Metismo, J2MEPolish, Mobile Sorcery, Celcius,Innaworks, Flexicore
- Let's start a Applications Suppliers Community.

The Fragmented Fight Against Fragmentation

- JIL, Joint Innovation Lab
- OMTP Bondi (Open Source standard for mobile web)
- Wholesale Application Community (24 operators)
- LiMo (10 operators) Mobile Linux Open Source consortium
- One API (GSMA)
- Open Mobile Ammiance (OMA)

Let's Fight Against Fragmentation

- Developers interests are different (no issue with Apple..)
- Developers are not represented in these consortia
- Developers have knowledge about fragmentation, because they are paying for it
- Call for a joint developers/publishers effort:

★ White Paper or Open Letter outlining key issues:

- ☑ Technology (standards, future, etc..)
- ☑ Business (revenue share, service agreement, etc..)

Interested? mcnoyons@nccpartners.com

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Marketing

- A free game should be like a movie trailer: Learn from the film industry,
- Use social networks in promoting your game,
- Determine price carefully (read Distimo)
- Participate in Awards (IMGA!)
- Use upgrades, features, highscores, achievements, feedback to establish relationships with consumers.

Any questions?

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