

GDC 2014

The Global Android Explosion Succeeding on Earth's Largest Gaming Platform

Torrey Lincoln

Sr. Director, Publisher Relations



@flurrymobile








FLURRY SEES...

 **OVER 4 BILLION**
APP SESSIONS 
launched around the world each day

CONSUMER BEHAVIOR ON OVER
 **1.3 BILLION**
smartphones and tablets each month

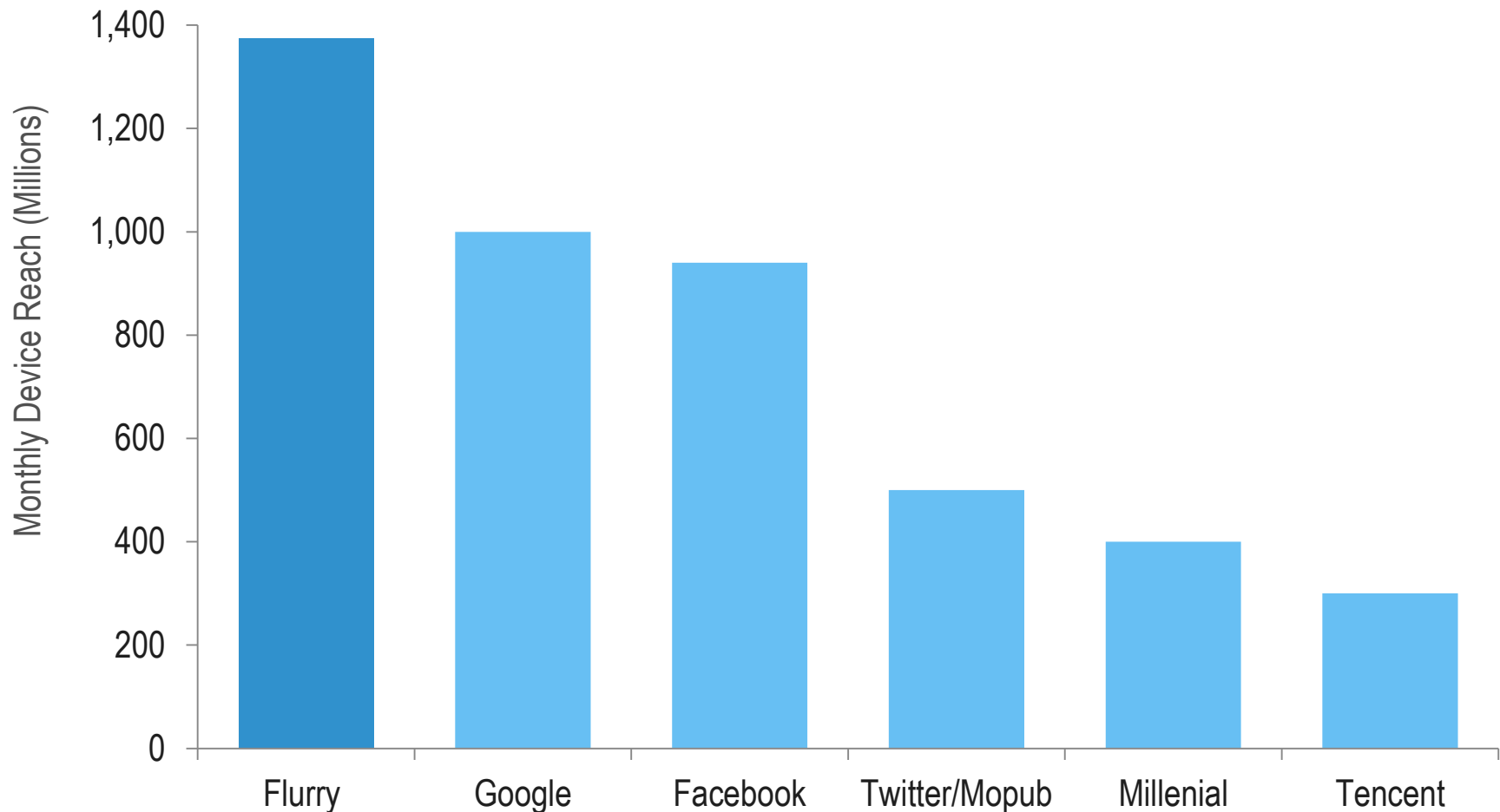
APP USAGE ON
 **90%**
of all active smartphones and tablets
around the world each month

 **OVER 1 TRILLION**
UNIQUE ACTIONS   
completed by consumers in apps each month

USER ACTIVITY FROM
7-10       
apps per device, on average

More Mobile Data Than Any Other Company

Few companies are positioned to optimize marketing investment at scale



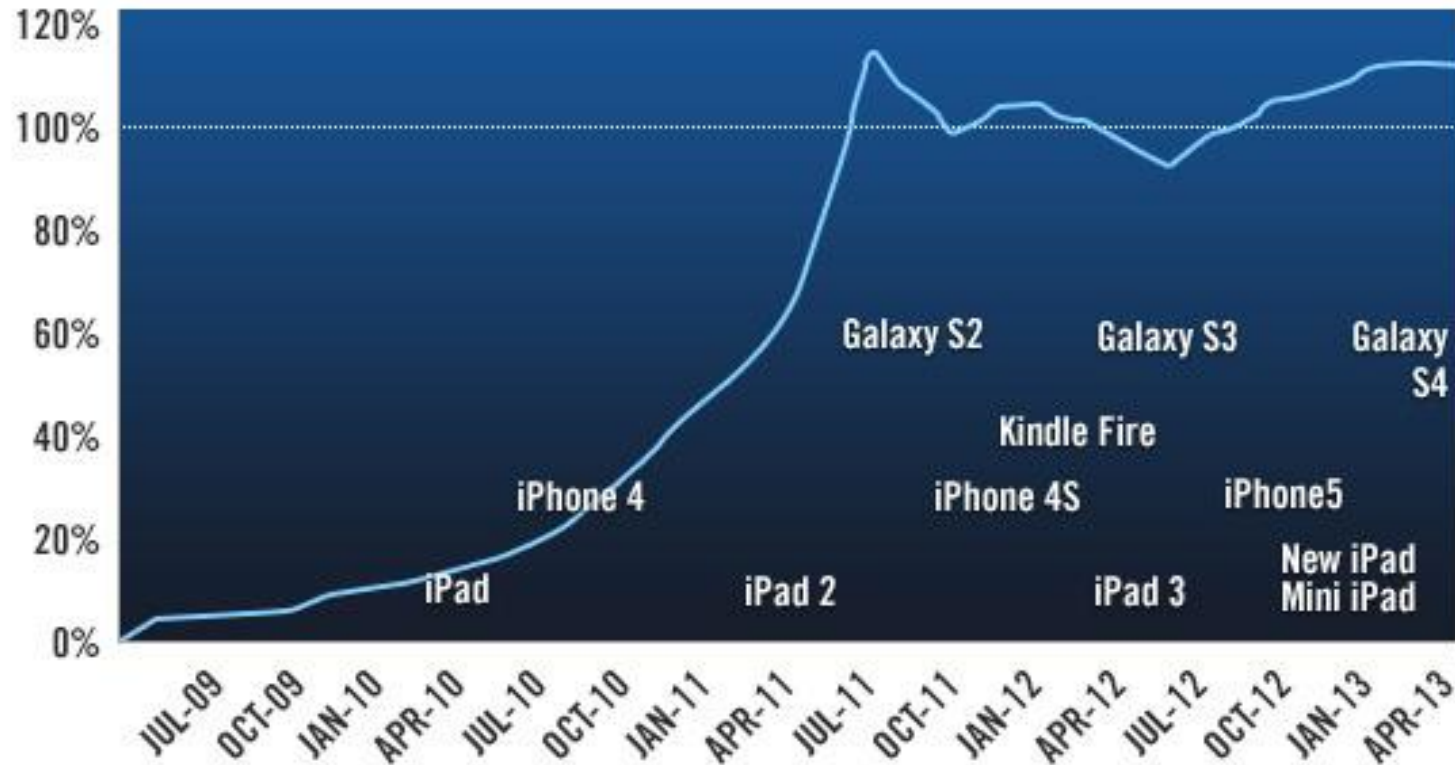
Common questions about Android

- Should we invest in Android development?
- What regions and countries are dominated by Android?
- How should we develop based on the Android device mix?
- How will in-app purchase revenues differ from iOS?
- What is the ad-based revenue opportunity?
- What are the common retention and usage patterns for different Android game genres?

Android's Global Adoption

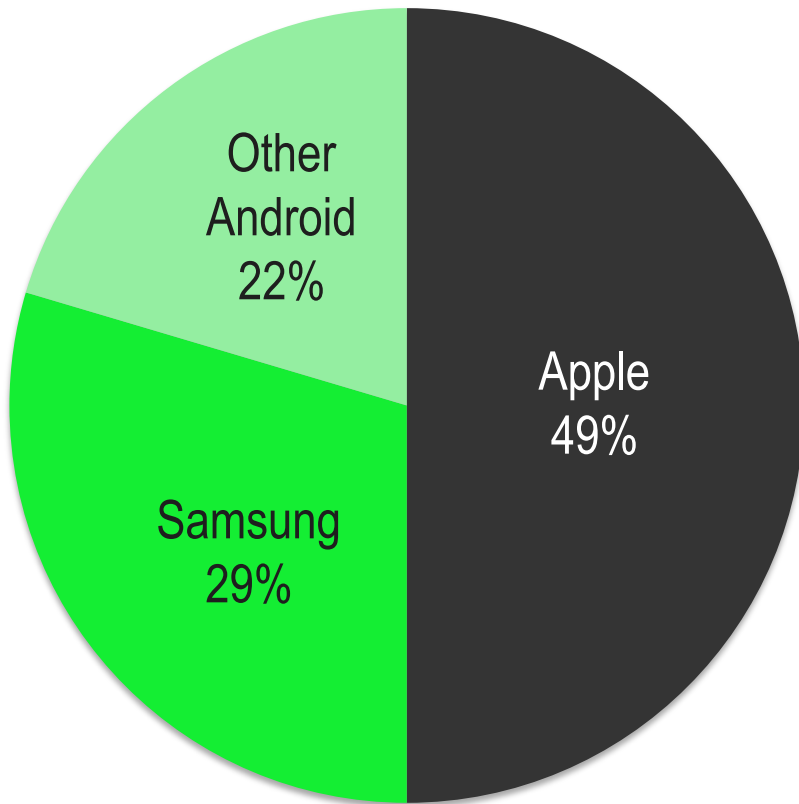
Android took a definitive lead in active devices back in 2012

Active Android Devices As A Percent of iOS Devices

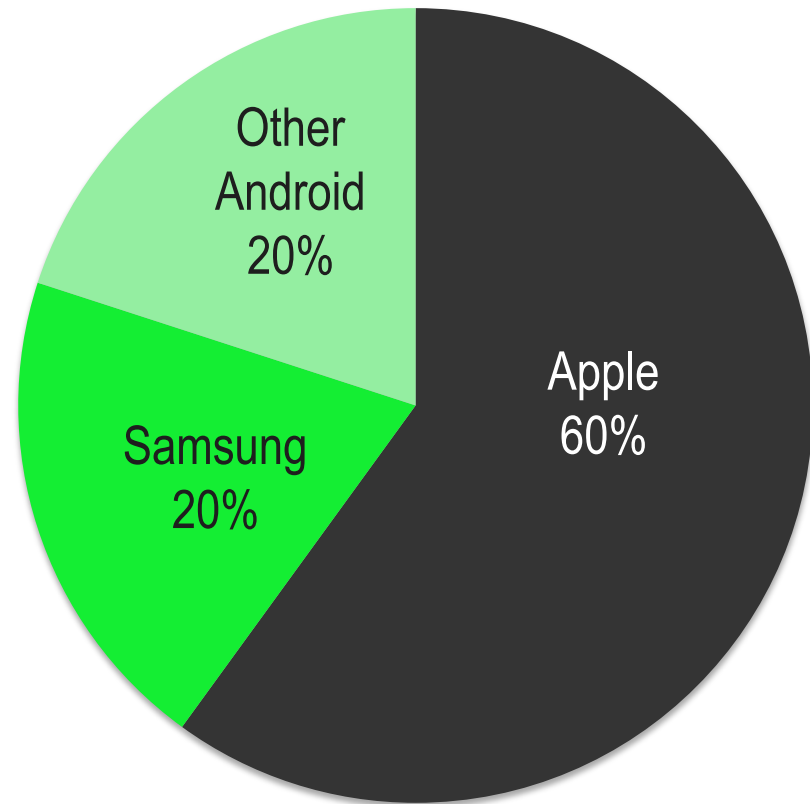


GLOBAL and US breakdown of Android vs. iOS

GLOBAL



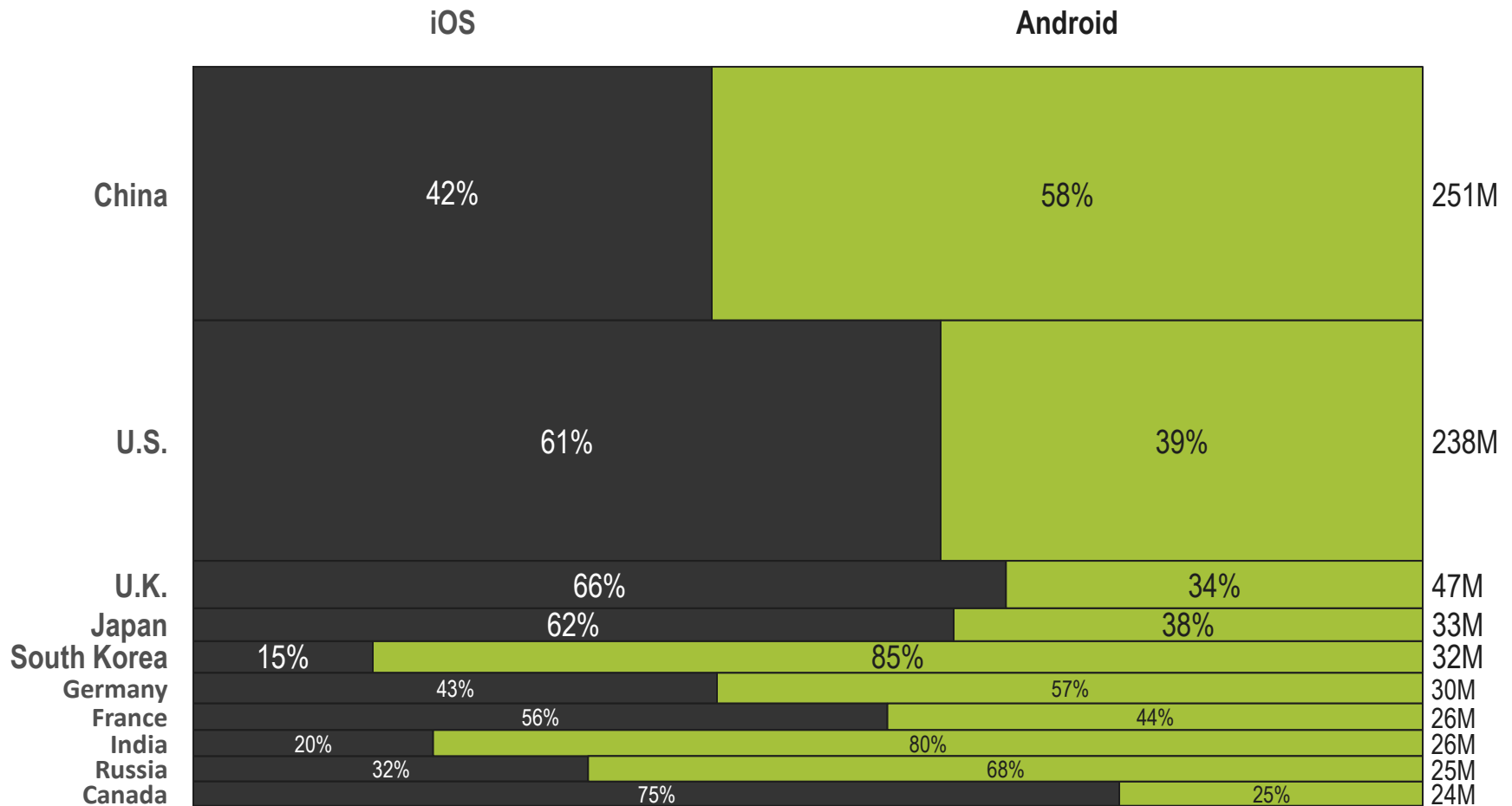
US



Source: Flurry Analytics; August 2013 sample of 107,339 devices (25,371 of which were US-based)

China Is the Largest Gaming Country with 251M Mobile Gamers

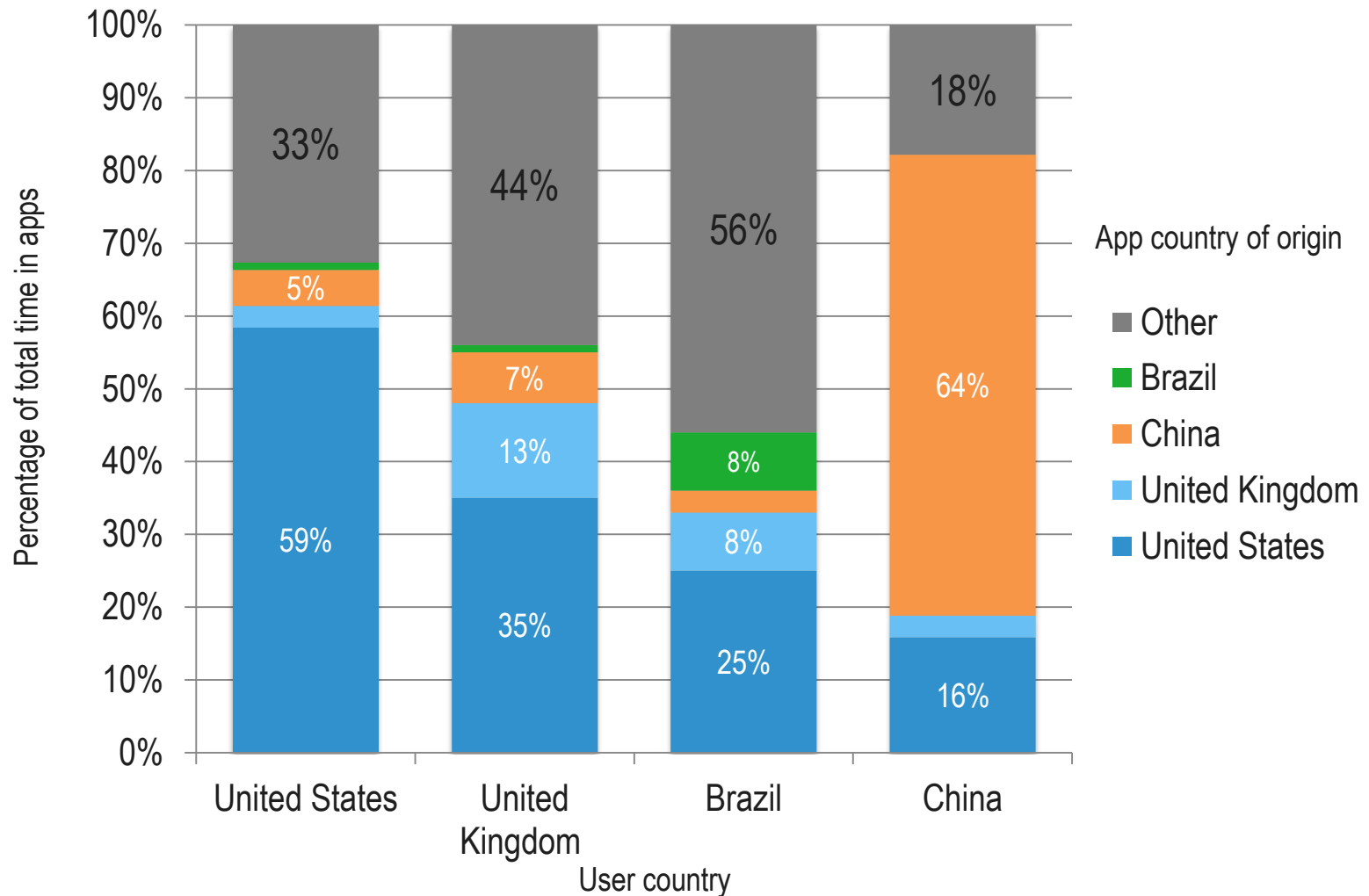
Top 10 Global Gaming Markets



Source: Flurry analytics data estimates of iOS and Android smart devices with usage in gaming apps (May 2013).

China is a Huge Opportunity, but Need to Localize

Total time spent in apps by user country and app country of origin

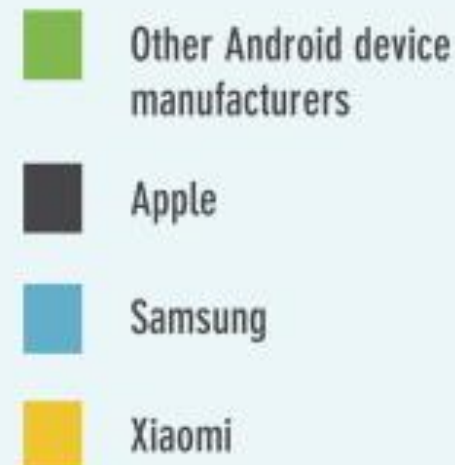
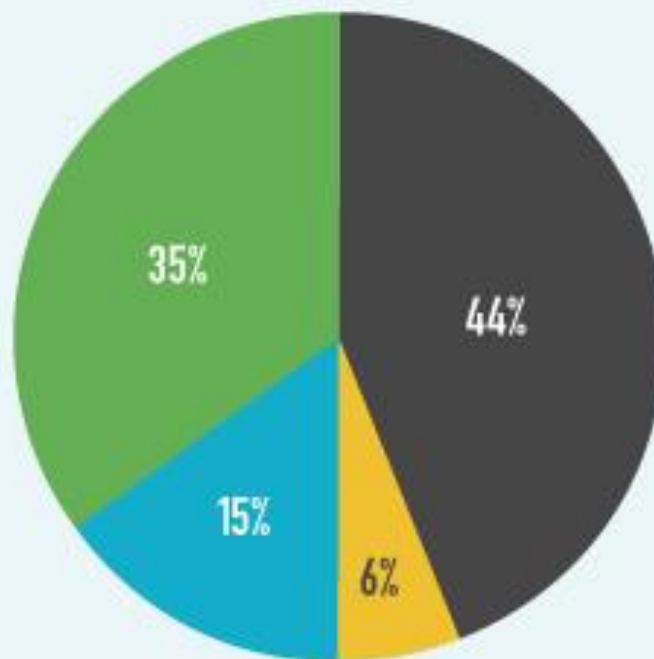


China Provides Massive Playing Fields for Both Android and iOS

iOS and Android Chinese Installed Base

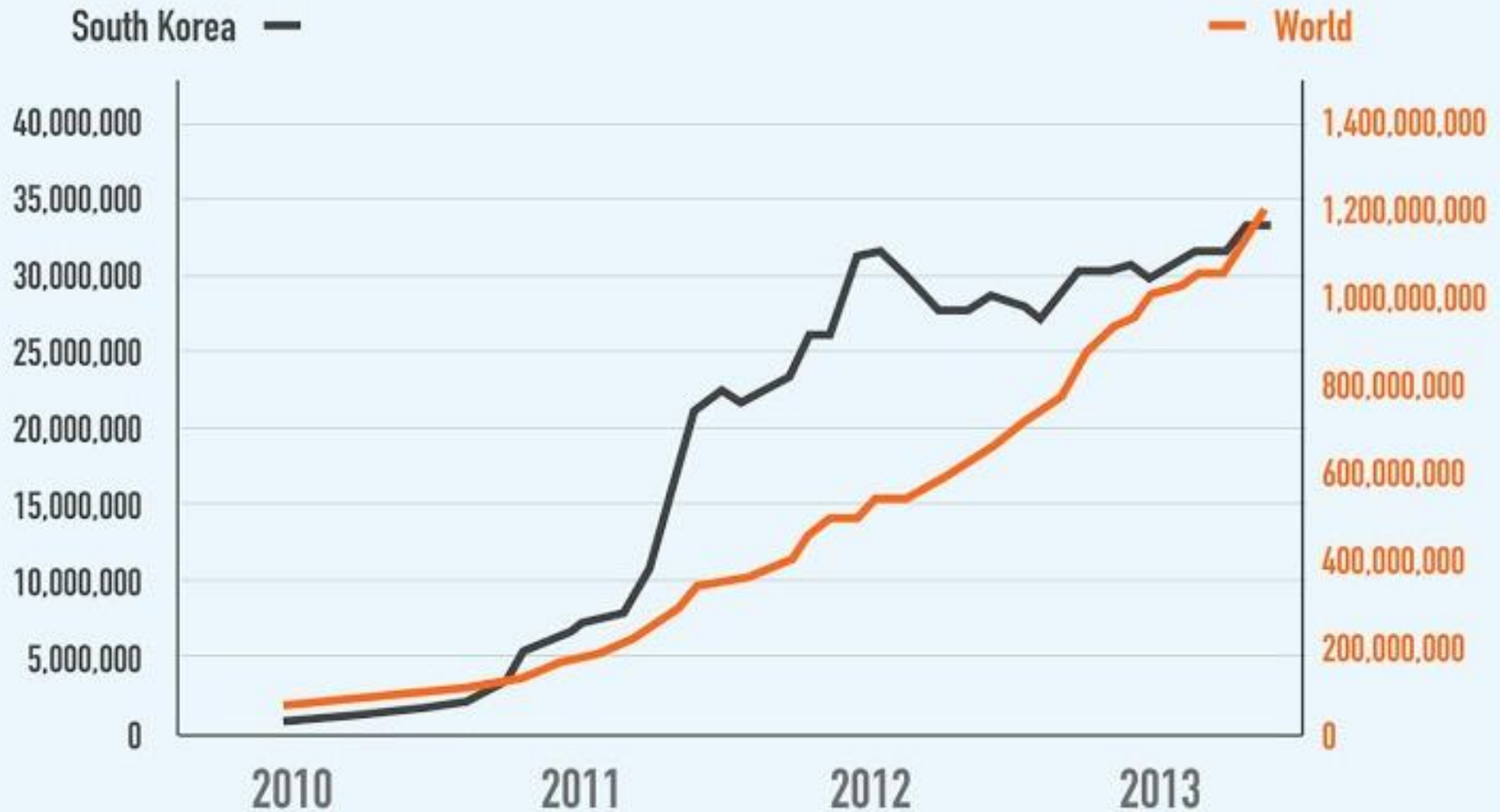


Huawei	2.63 %
Lenovo	2.56 %
HTC	2.44 %
BBK	1.39 %
ZTE	1.30 %
OPPO	1.25 %
Coolpad	1.16 %
Sony	0.69 %
Sony Ericsson	0.68 %
Meizu	0.68 %
Motorola	0.58 %
Gionee	0.49 %
K-Touch	0.49 %
LG	0.46 %
Hisense	0.26 %
APEC	0.20 %
Other	17.74 %



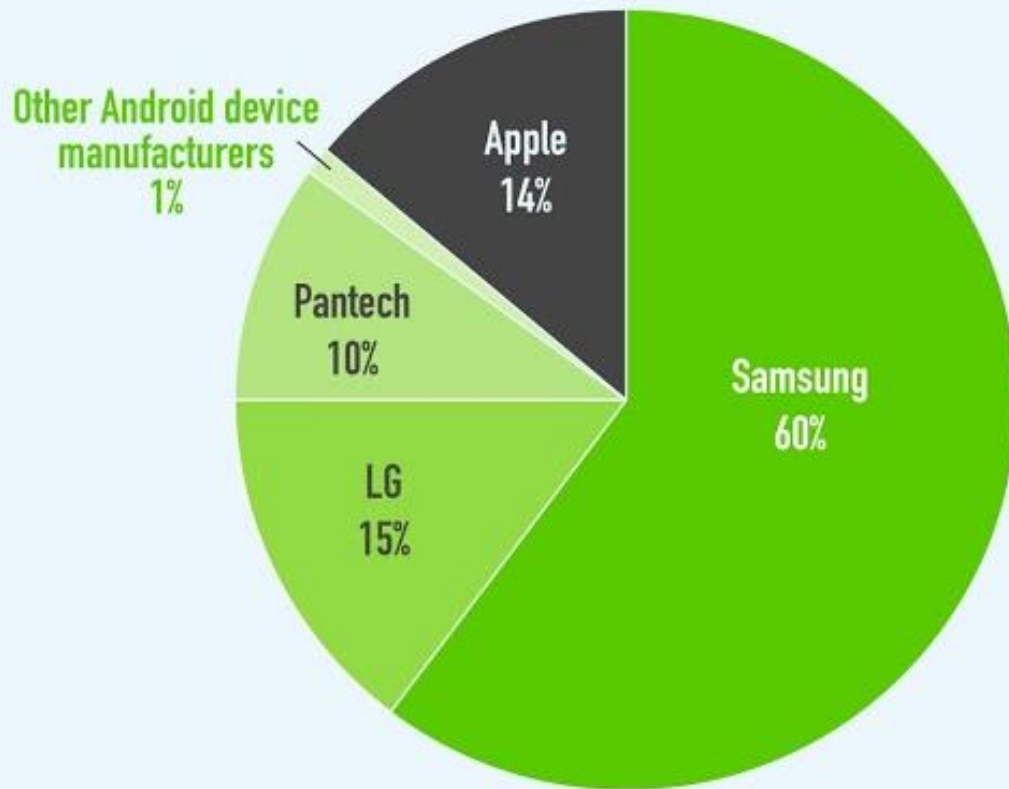
Source: Flurry Analytics, random sample of 18,310 Chinese owned iOS and Android devices.

South Korea – World's First Saturated Smart Device Market



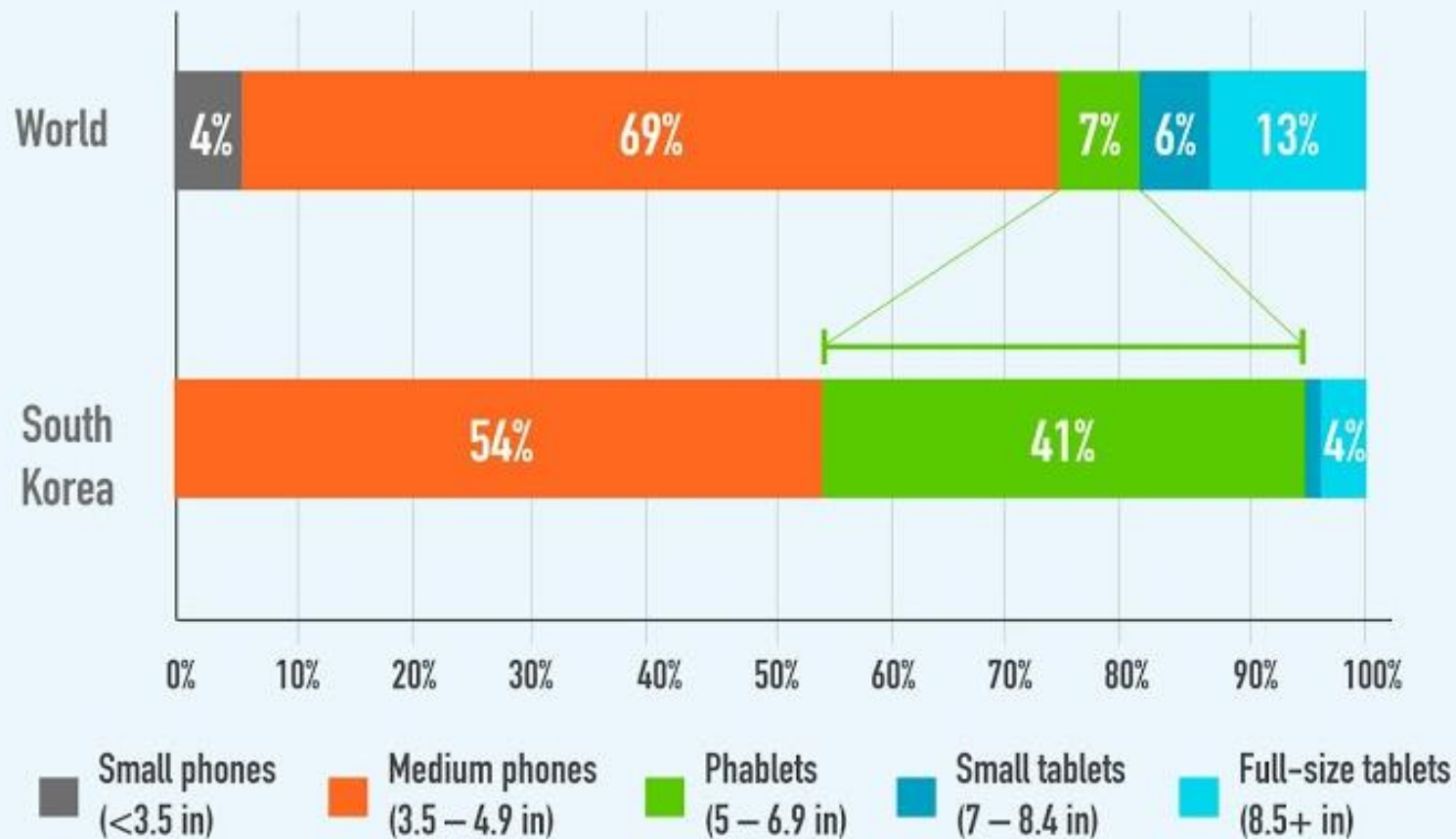
Source: Flurry Analytics

Android Dominates the South Korean Market



Source: Flurry Analytics, August 2013 random sample of 3124 South Korean owned iOS and Android devices.

Tablet + Phone Hybrids are Uniquely Popular in South Korea

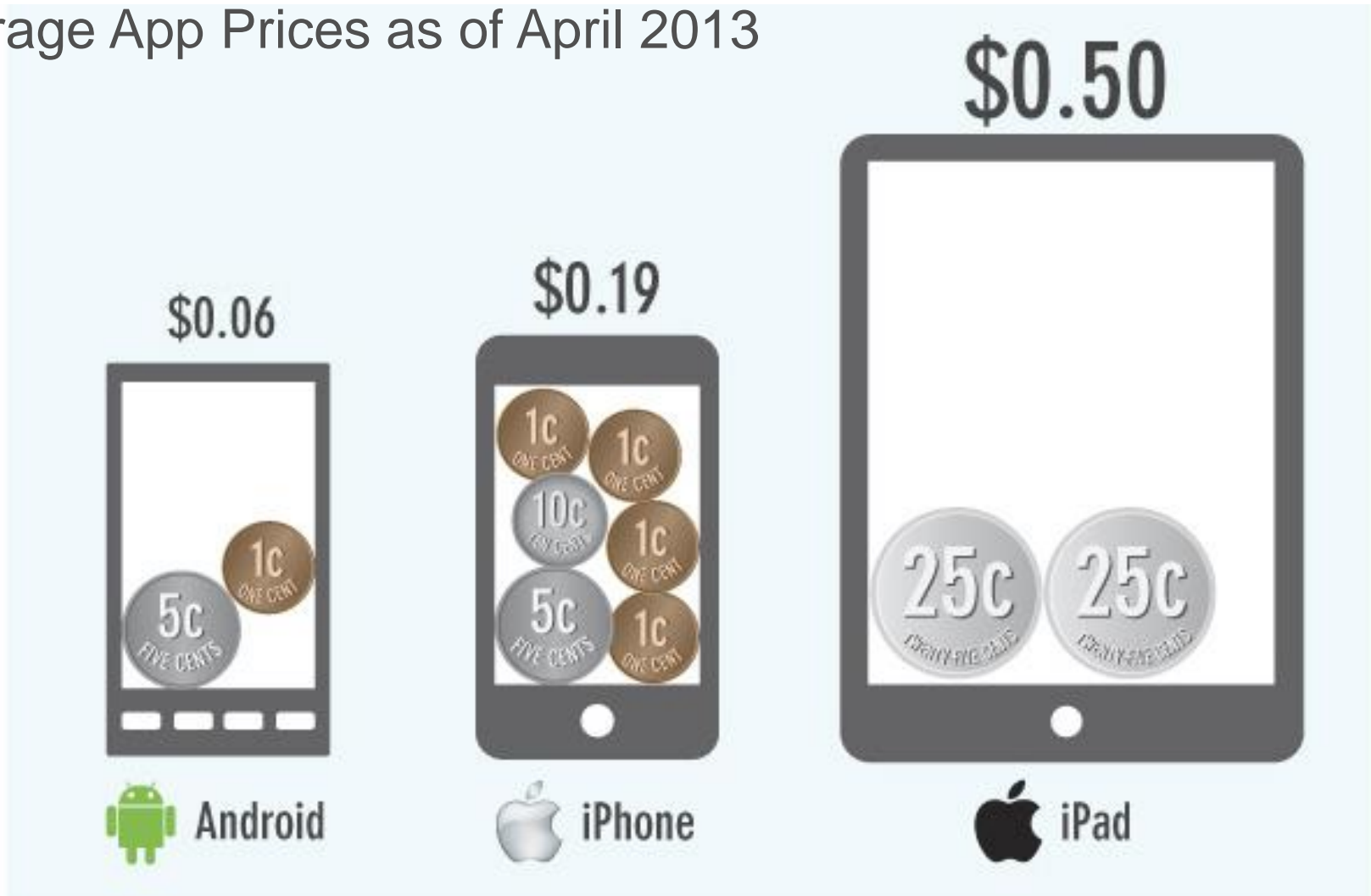


Source: Flurry Analytics, form factor shares for an August 2013 random sample of 97,963 iOS and Android devices.

Android Gaming

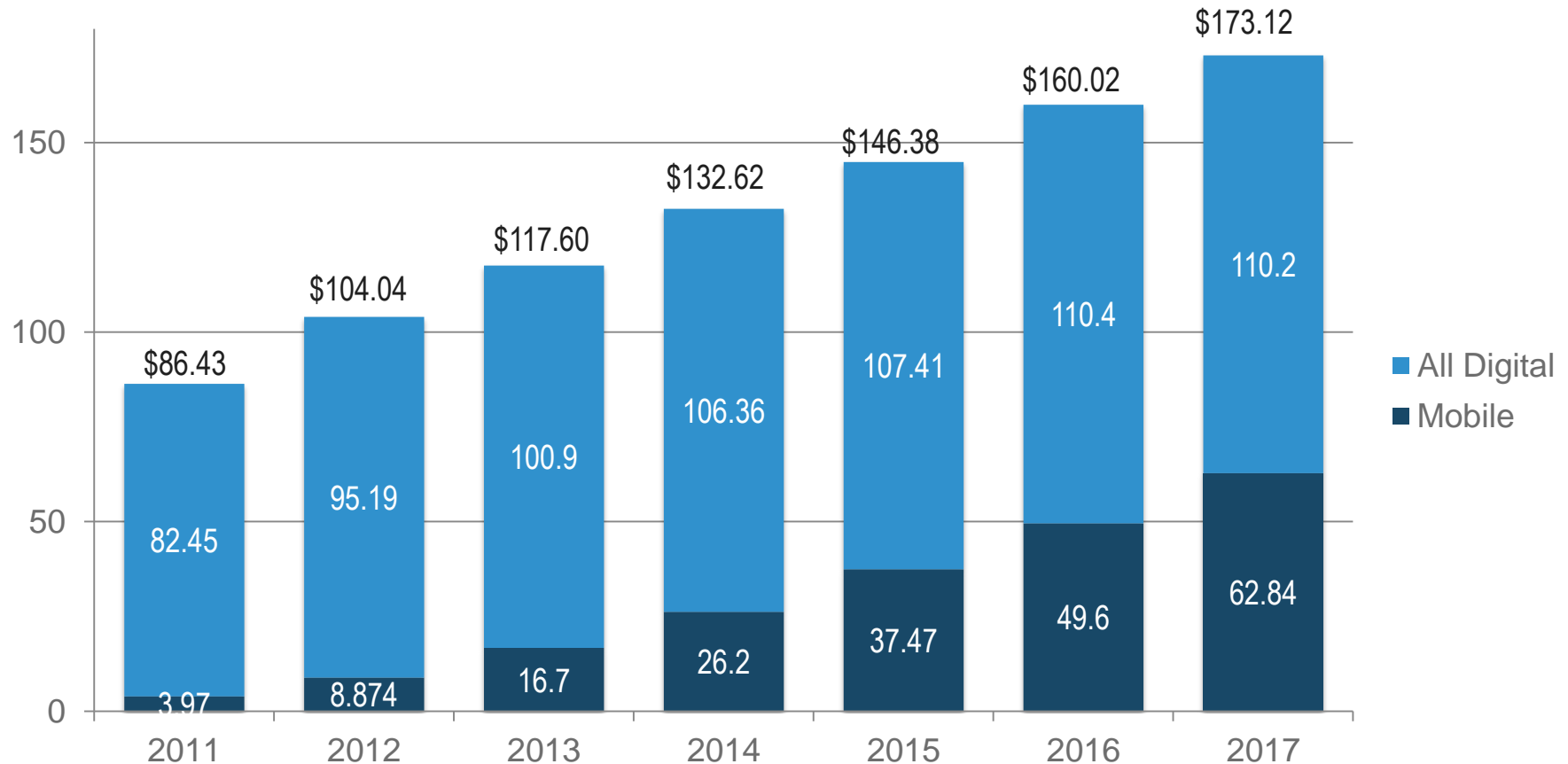
Android Games = Free Games!

Average App Prices as of April 2013



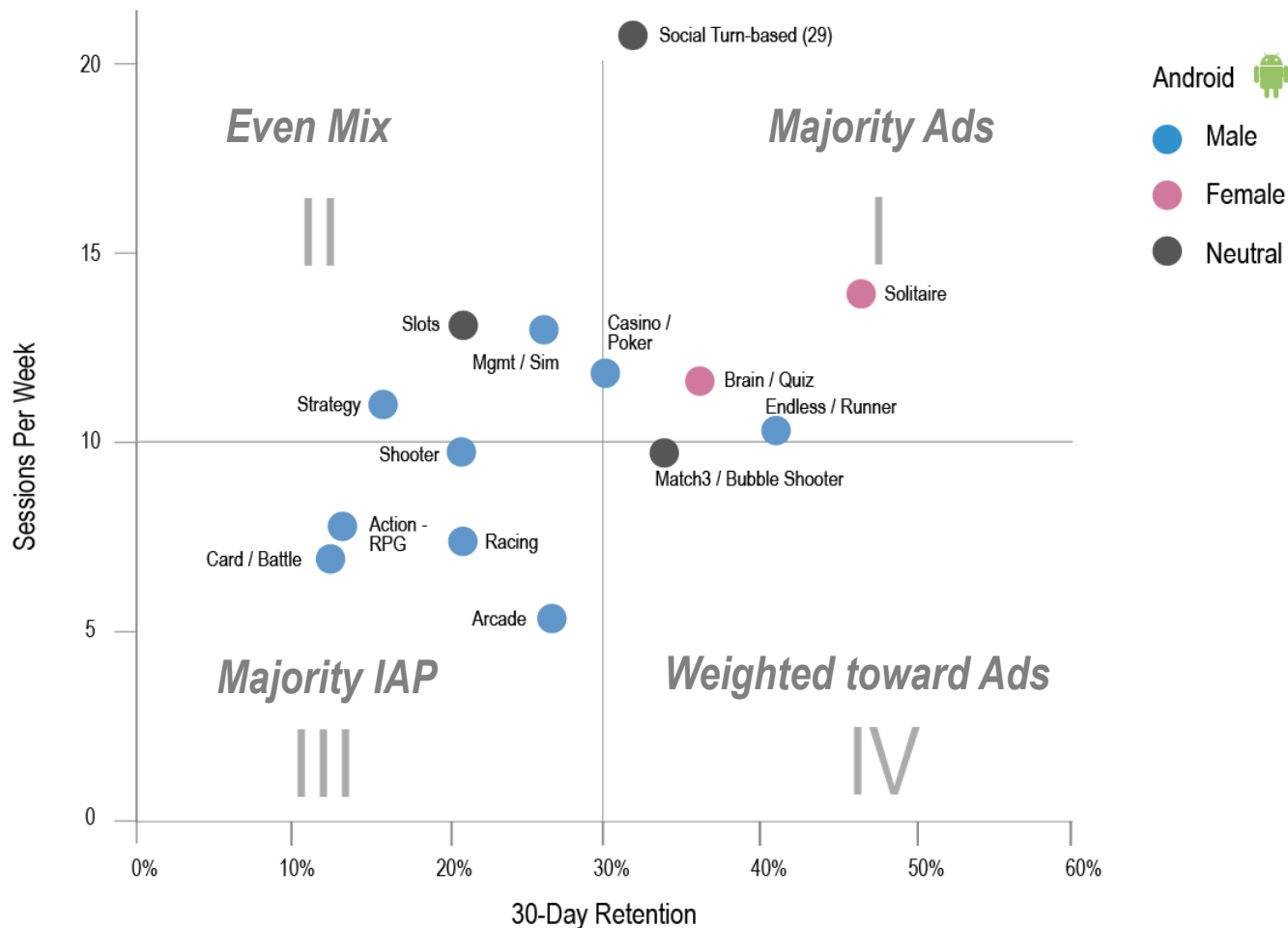
Mobile's Share of Advertising is Growing at Incredible Rates

Worldwide total mobile spend as a % of digital spend (in \$BN)



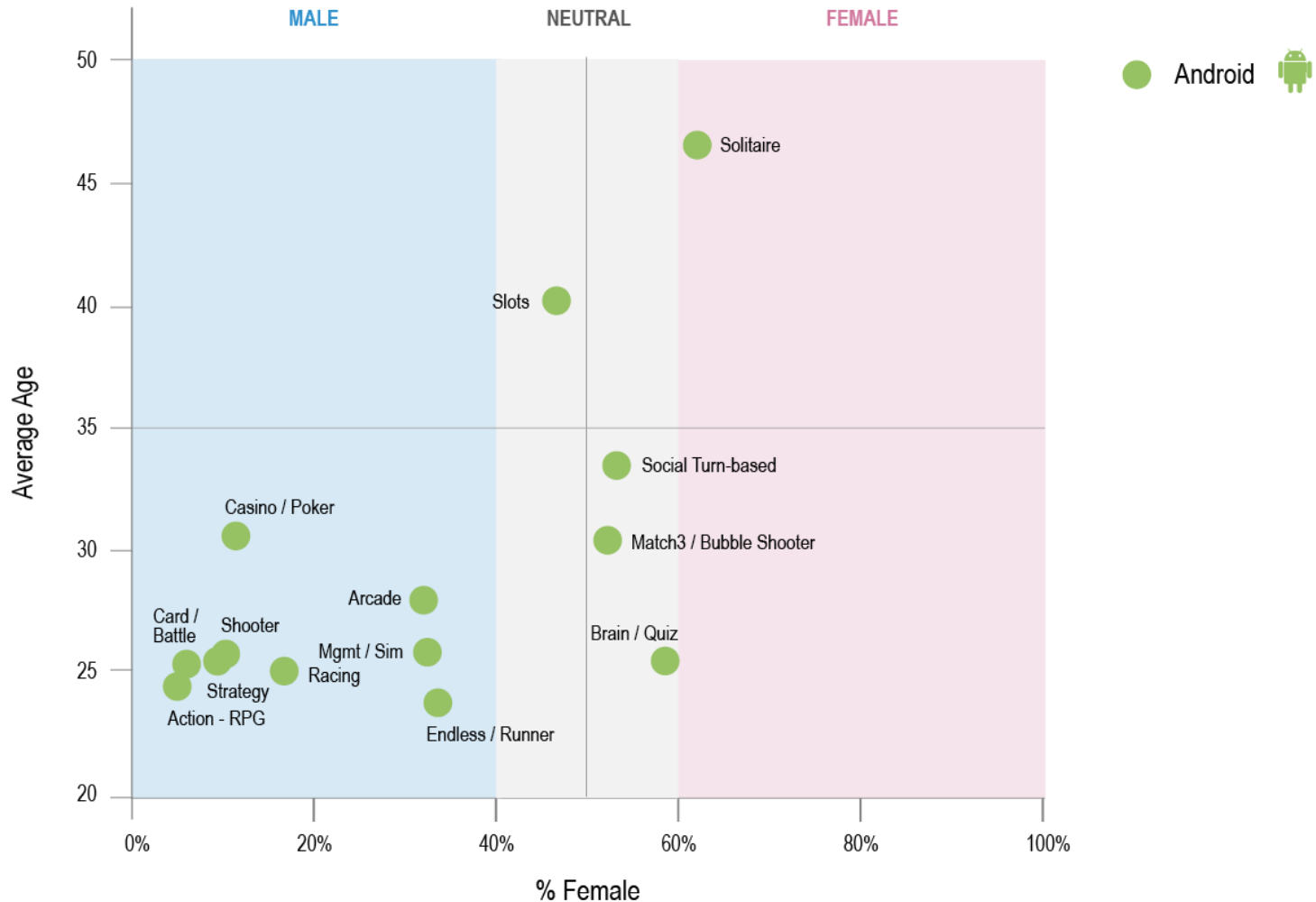
The Matrix: Reloaded for Android

Loyalty by App Category: Top Free Android Game Genres



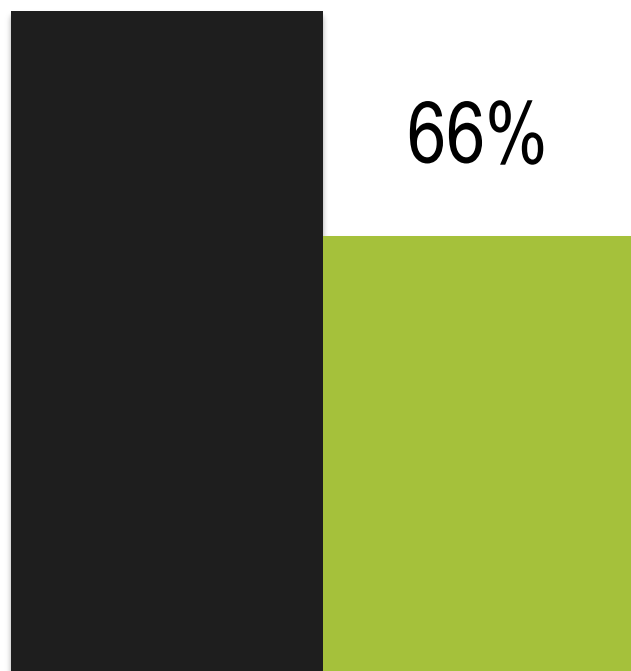
Know Your Audience: Targeted User Acquisition

Top Free Android Games by Audience

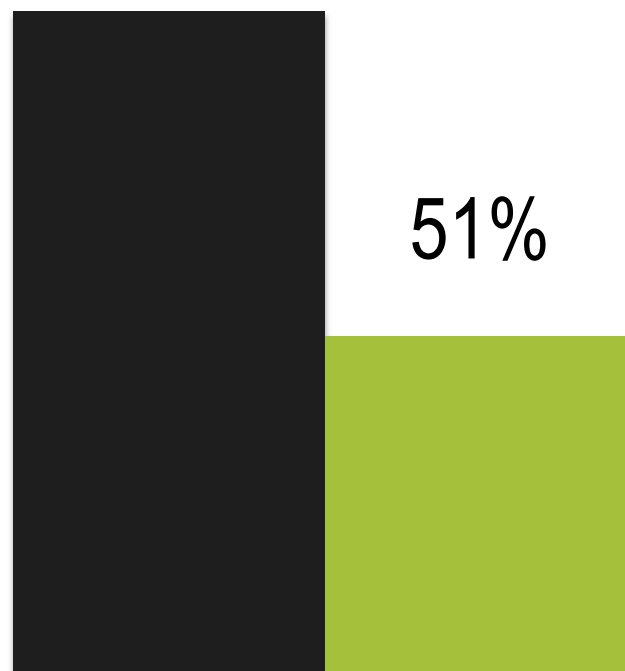


Effective CPMs on Android Lag their iOS Counterparts

Display eCPMs



Rewarded Video eCPMs

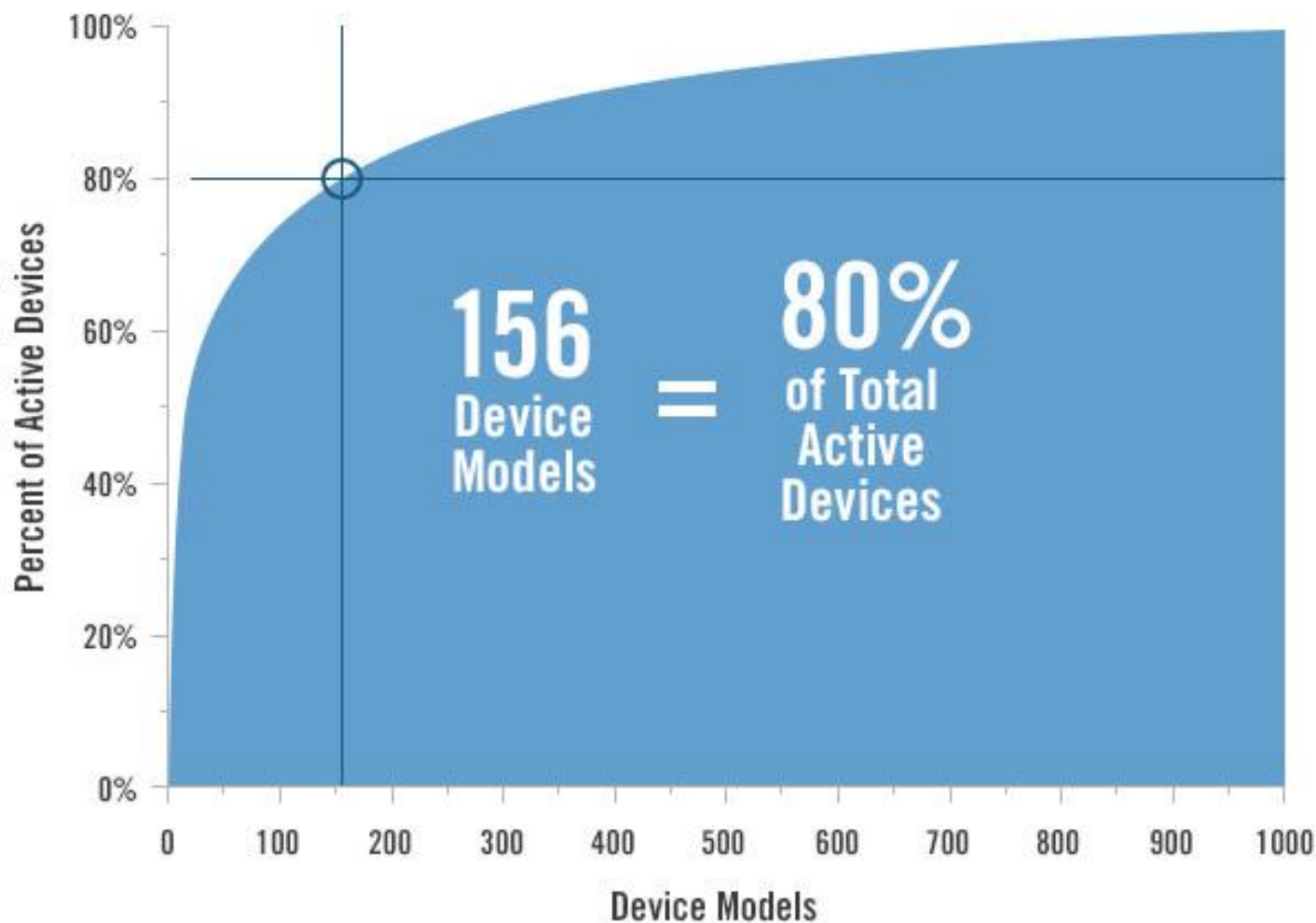


■ iOS

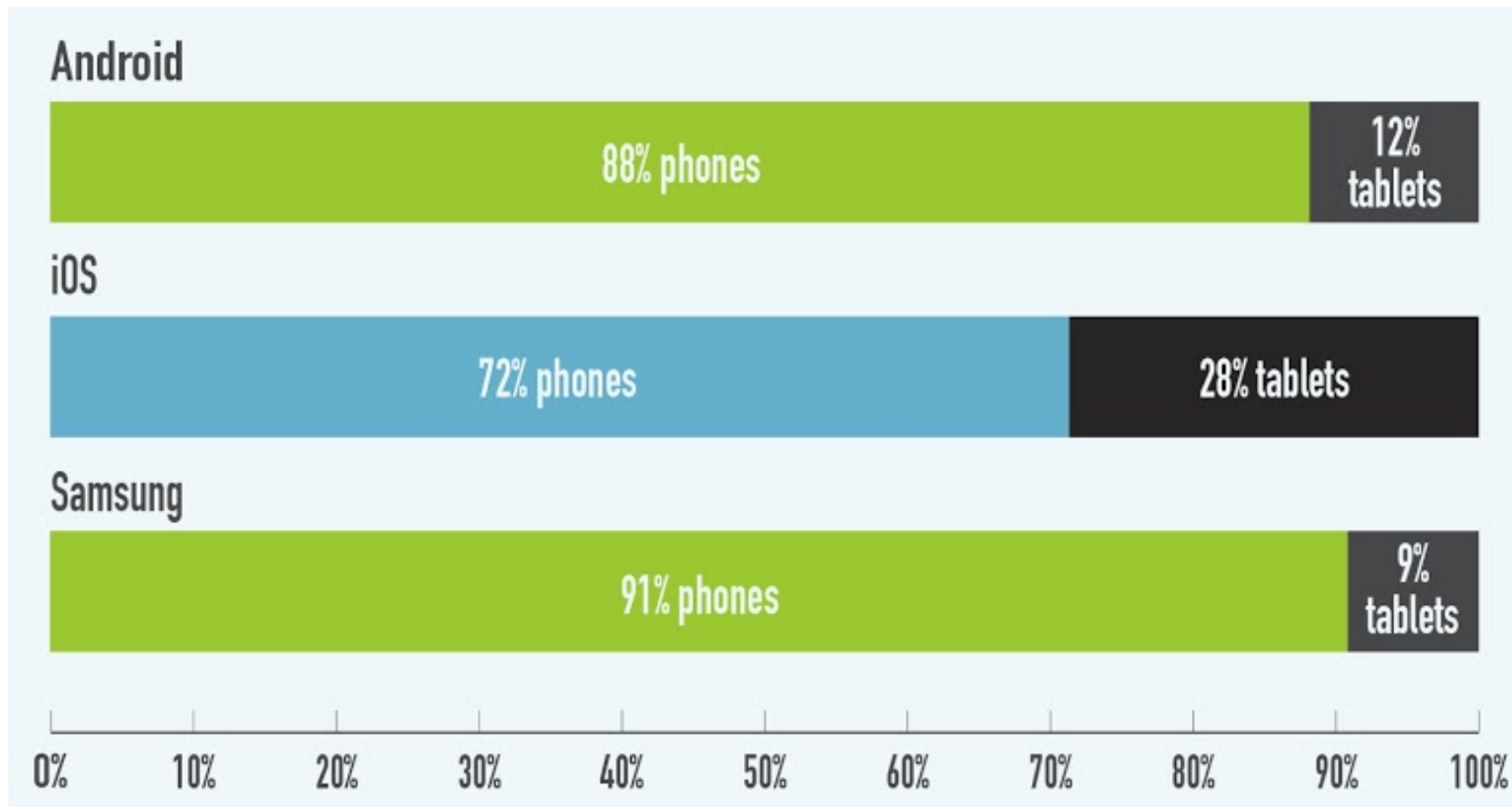
■ Android

Broad Android Device Support Requires Significant Work

Number of Device Models that Make Up % of All Active Devices



Device-Type Splits by Platform / Manufacturer



Takeaways

1. The age of Android global dominance is here
2. Asia represents and enormous opportunity for games in Android
3. Free games are a must
4. Regardless of genre you can monetize successfully
5. Design monetization tactics around different usage patterns for each genre
6. Utilize audience and device targeting in user acquisition
7. Consider different device prioritization on Android

March 17, 2014

Thank you

torrey@flurry.com

blog.flurry.com

[@flurrymobile](https://twitter.com/flurrymobile)