



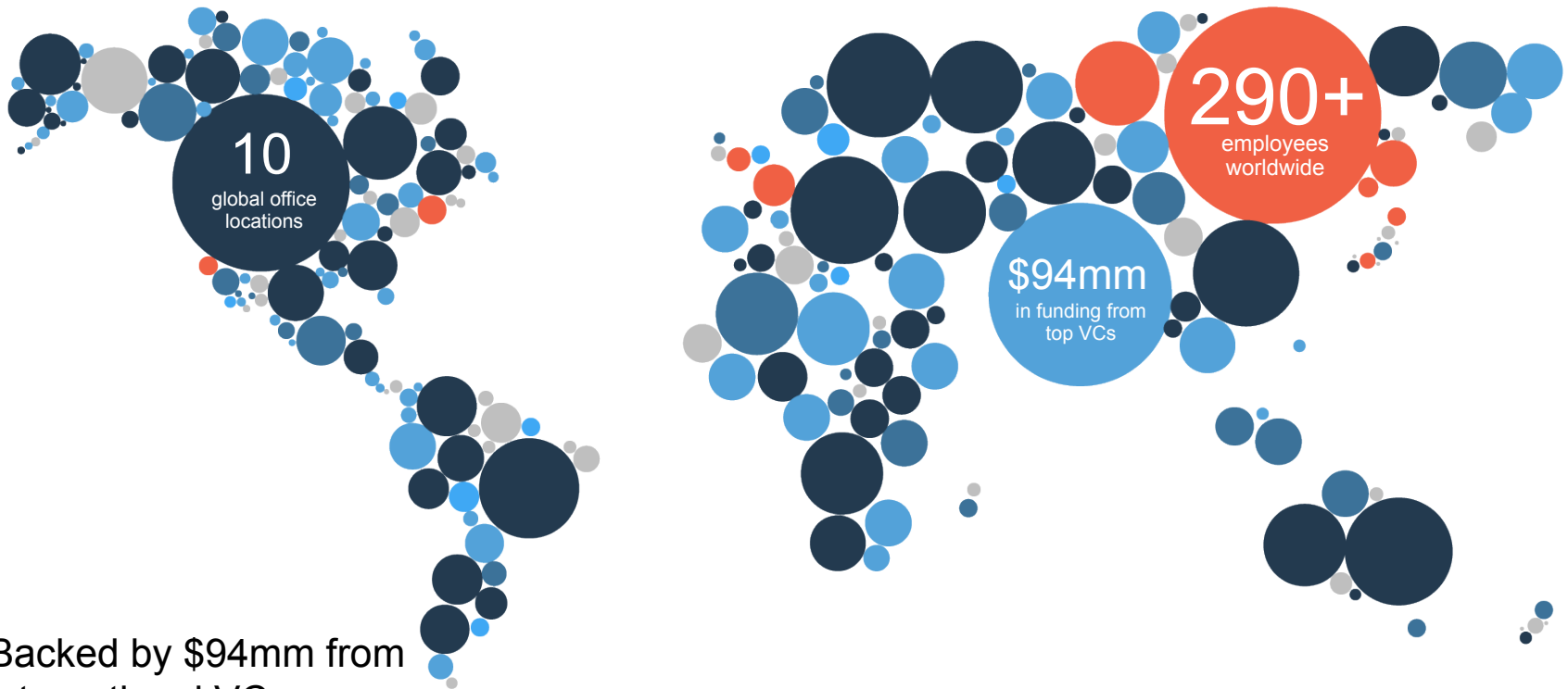
Game Trends in Taiwan and Worldwide

Asia Pacific Game Summit 2015
Taipei, Taiwan - Jan. 29, 2015

Bin Dai
Director, Greater China

About Us

With offices in San Francisco, New York, Utrecht, London, Moscow, Shanghai, Seoul, Beijing, Hong Kong, and Tokyo, App Annie is the world's biggest mobile analytics company



Backed by \$94mm from international VCs

United States

SEQUOIA CAPITAL



GREYCROFT

China

IDG Capital Partners

Japan








































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Global

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App Annie

The best and brightest choose App Annie

Games	       
Social	       
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Advertising	      

90% of the top 100 publishers use App Annie

App Annie products – the industry standard



Analytics

Track your own apps sales, downloads, and reviews.

Used by over 700,000 apps.



Advertising

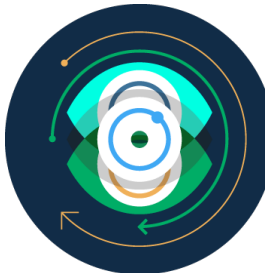
Combine data from all your ad platforms, automatically and track your own ad revenue and ad spend.



Store Stats

Track the rank, pricing and placement of any app and e-book.

Following 6,400,000+ apps.



Intelligence

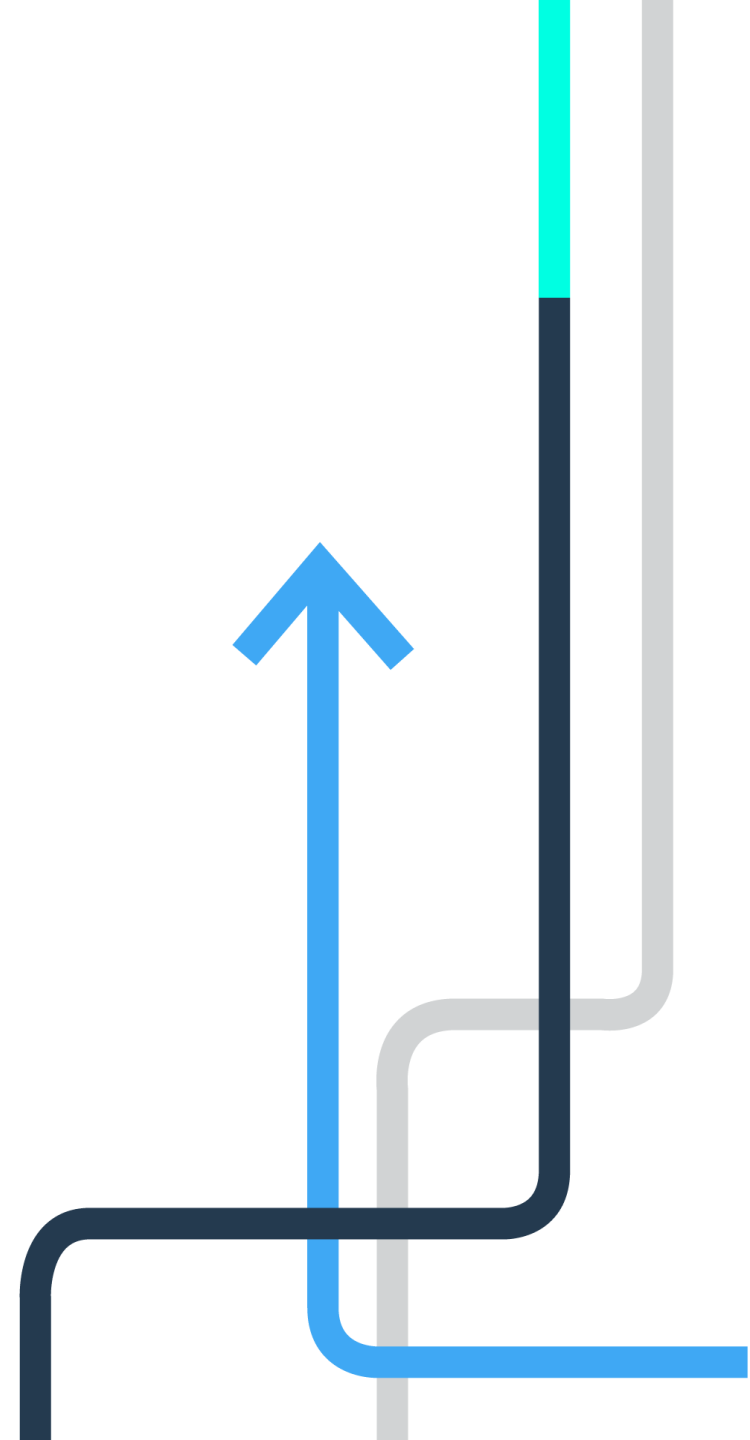
Obtain the most accurate estimates of revenues and downloads for any app.

Purchased by 9 of the top 10 publishers.

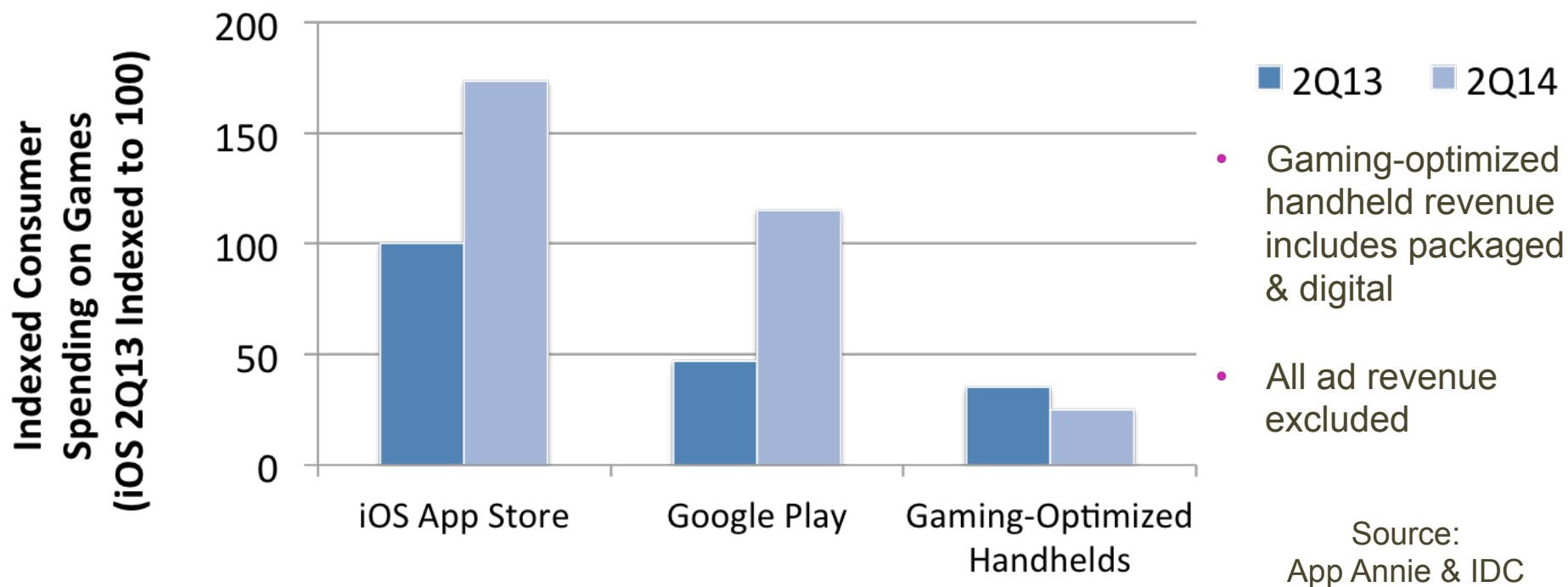
Game Trends in Taiwan and Worldwide

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2. Country Trends
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App Annie



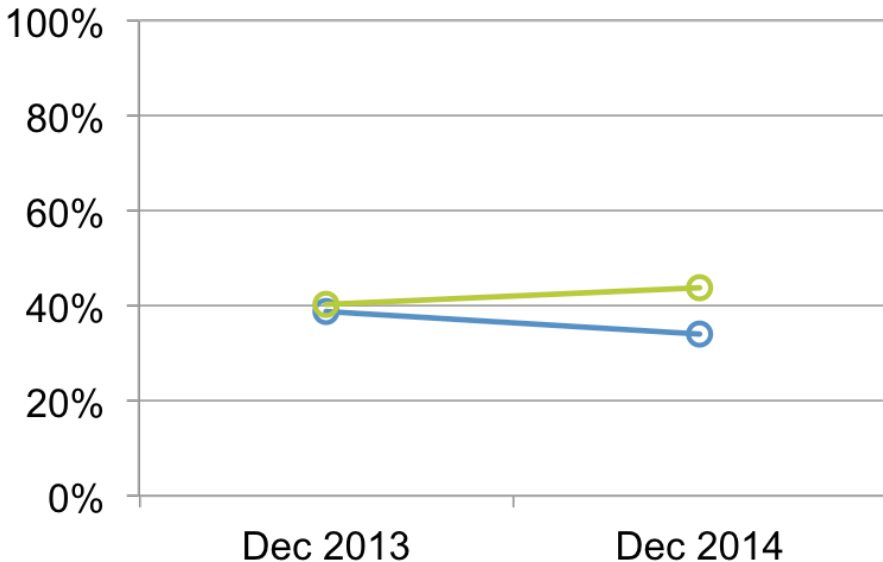
Worldwide Mobile & Portable Game Consumer Spending Q2 2013 vs. Q2 2014



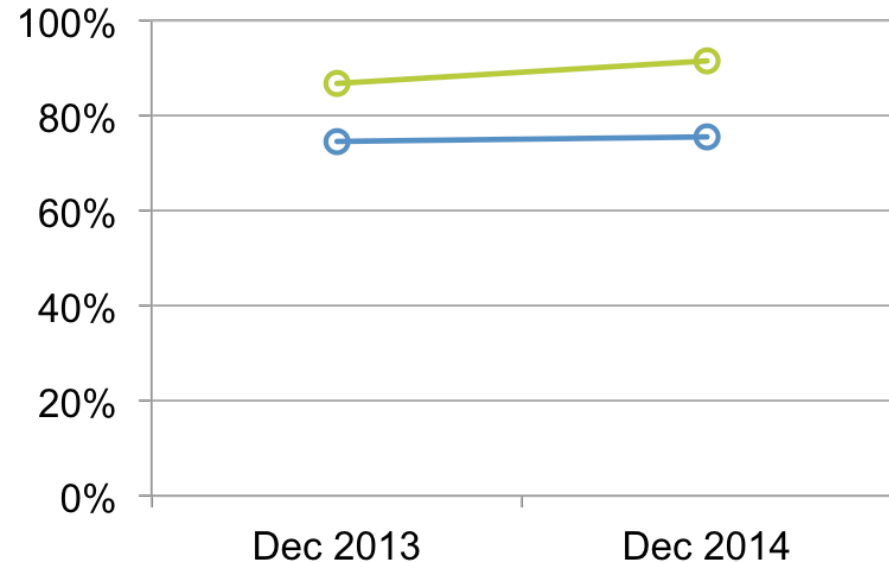
- iOS app store game revenue grew over 70% from 2Q13 to 2Q14 & Google Play more than doubled total game revenue generated
- Gaming-optimized handheld software revenue declined 28% over the same period

Game Downloads and Revenue Share iOS App Store and Google Play

% of Downloads from Games



% of Revenue from Games



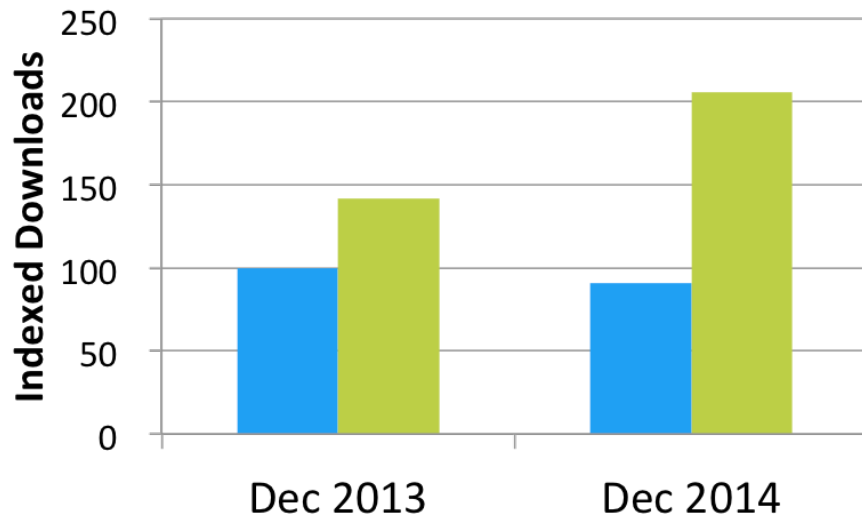
— iOS App Store — Google Play

- Games kept growing its share of downloads and revenue on Google Play
- Games continue to contribute over 70% of revenue on the iOS App Store

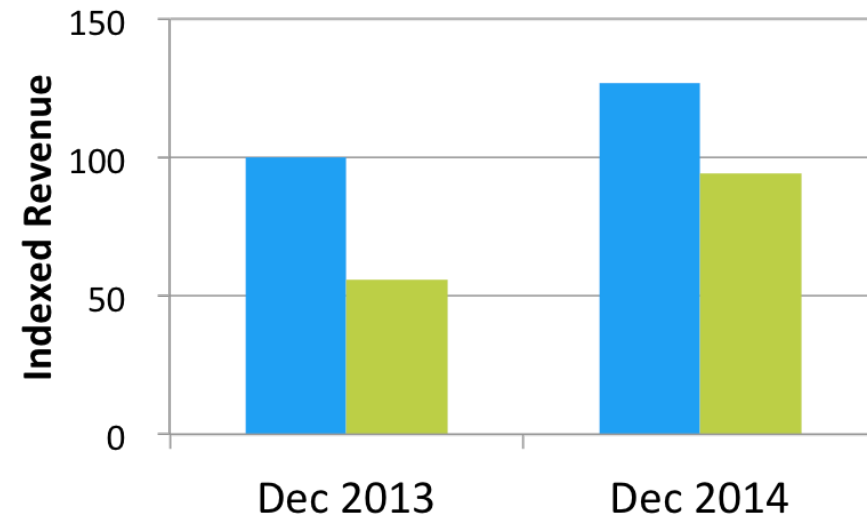
Game Downloads and Revenue Trends

iOS App Store and Google Play

Game Downloads



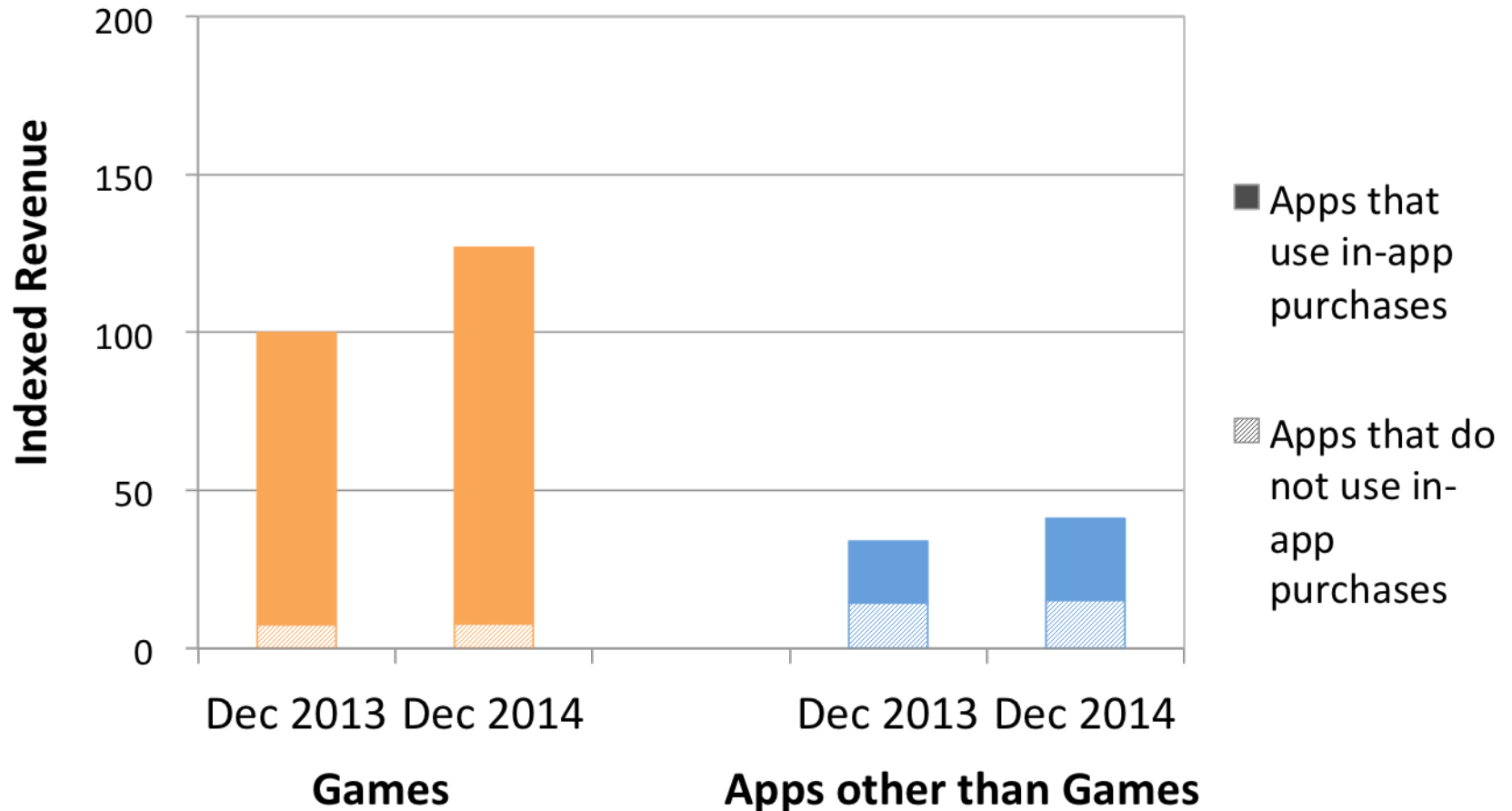
Game Revenue



■ iOS App Store ■ Google Play

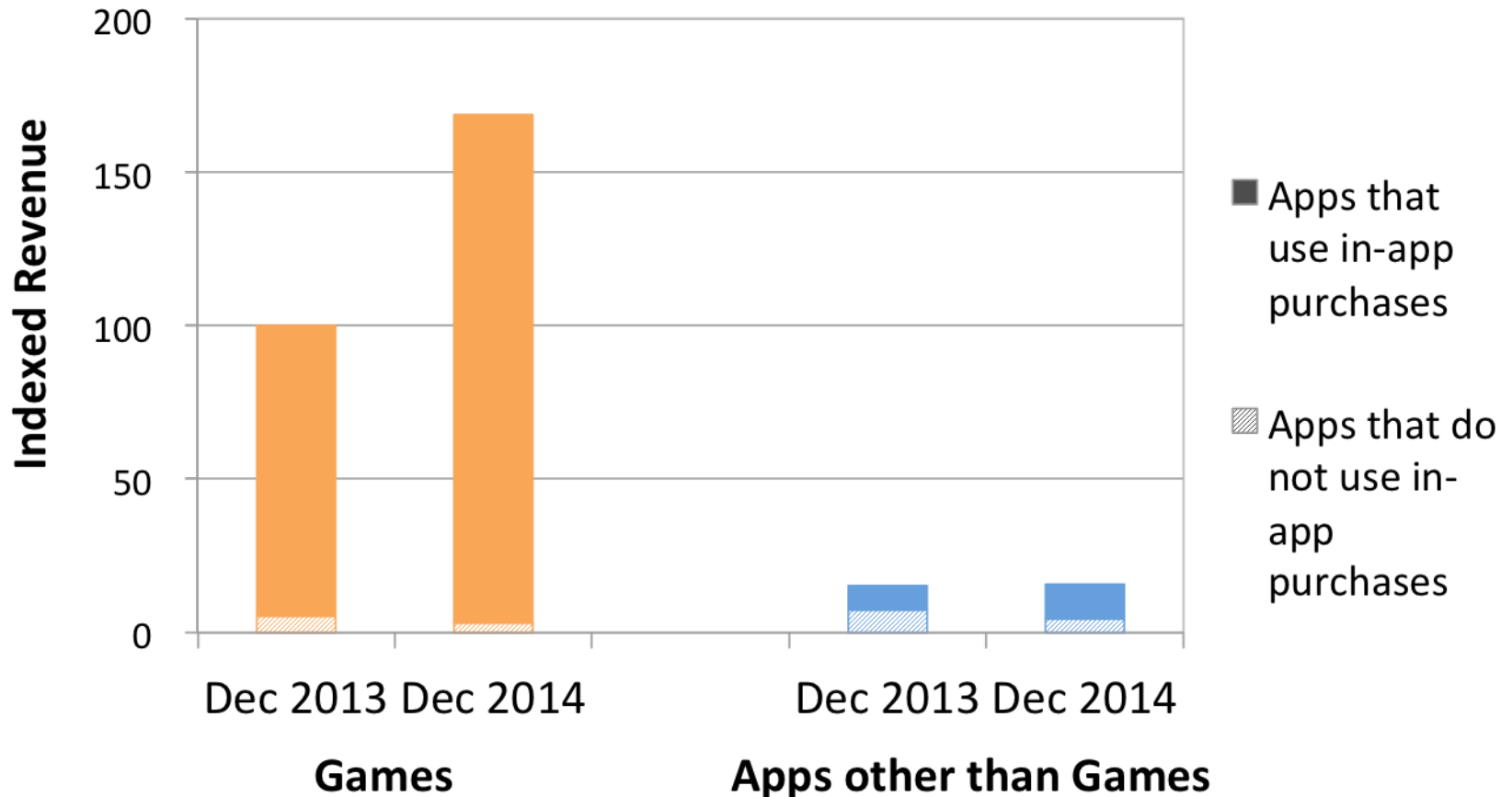
- Over the past year, Google Play has grown a significant lead in downloads
- iOS App Store remained the leader in game monetization, earning over 35% more than Google Play

In-App Purchases in the iOS App Store



- Over the past year, the in-app purchase business model has gained momentum, especially for games

In-App Purchases in Google Play

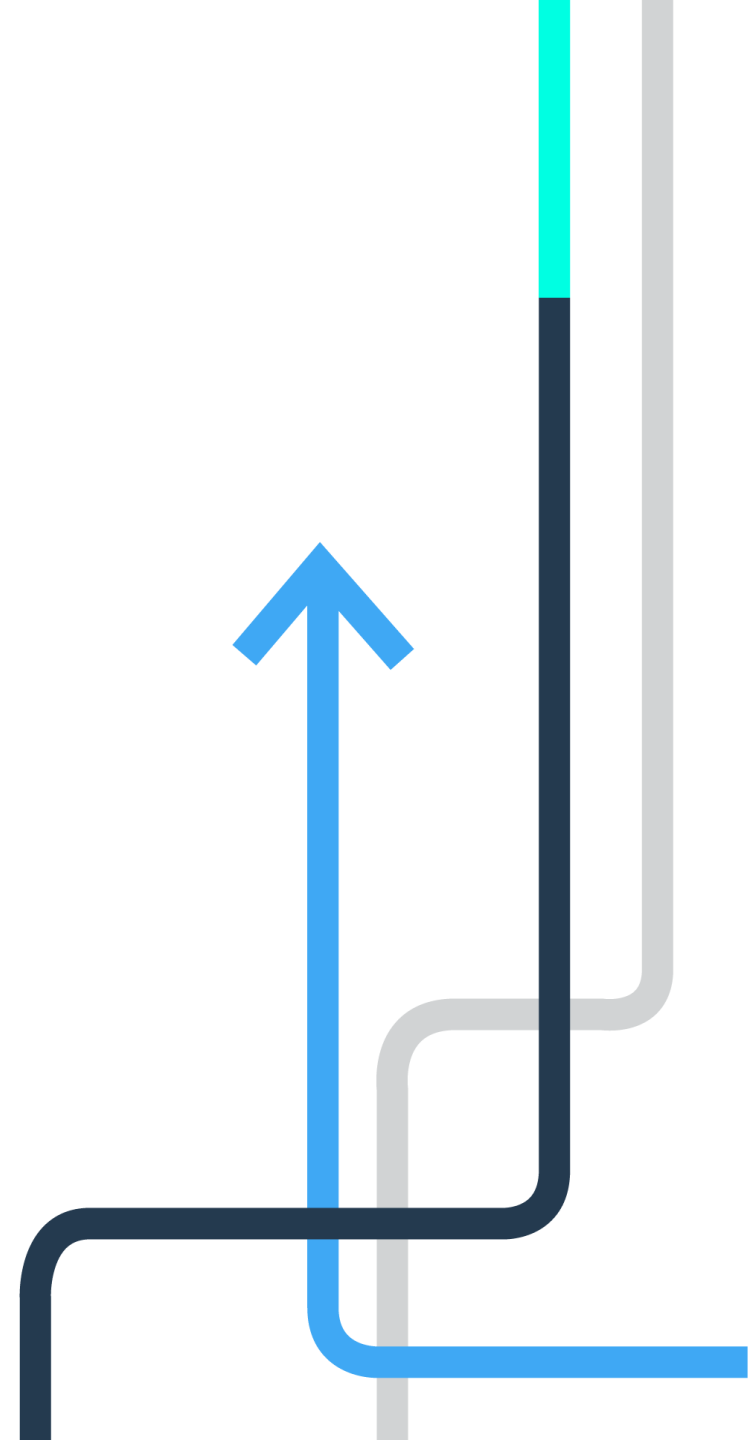


- Game revenue is even more concentrated in in-app purchases in Google Play than in the iOS App Store

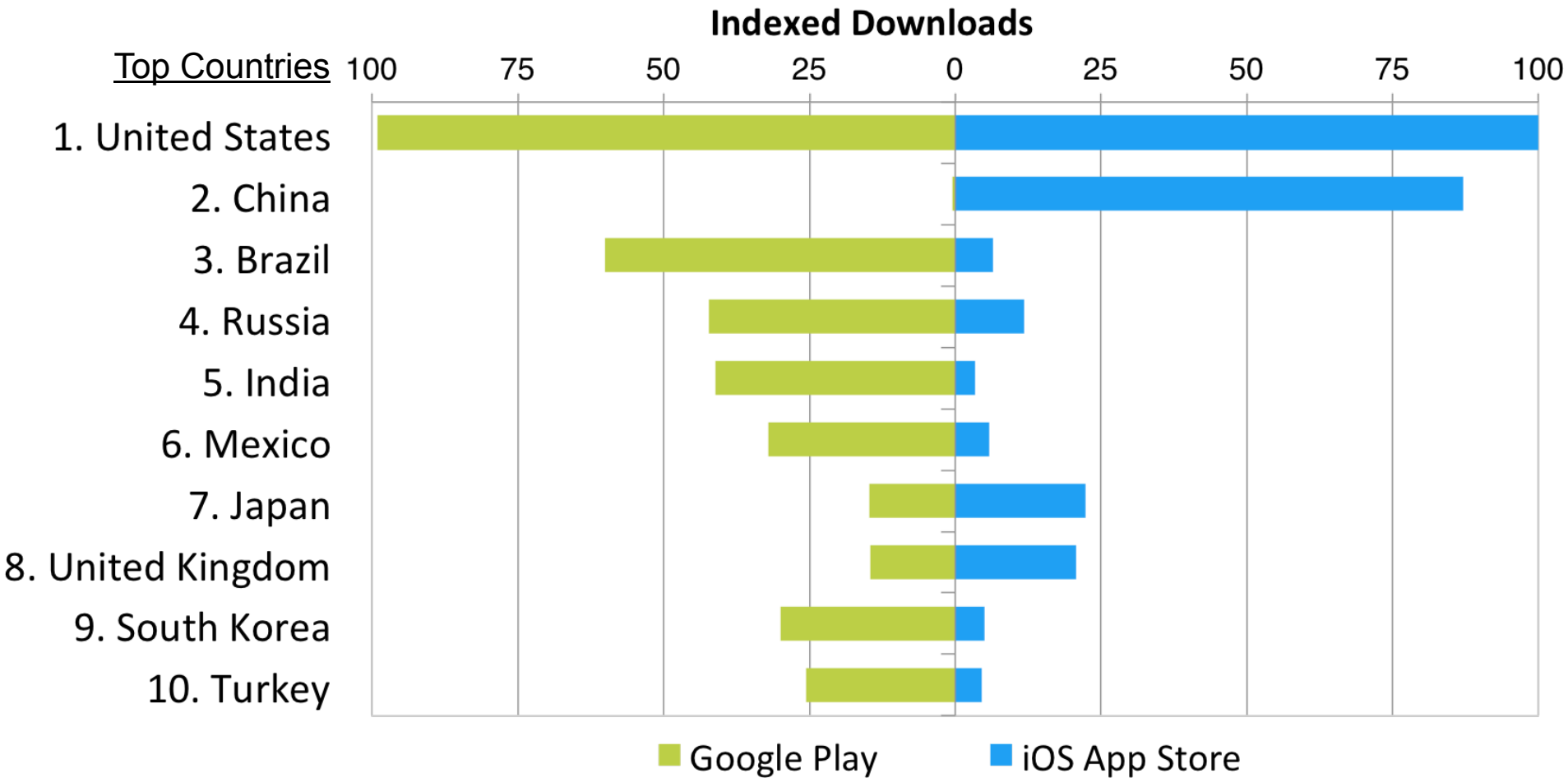
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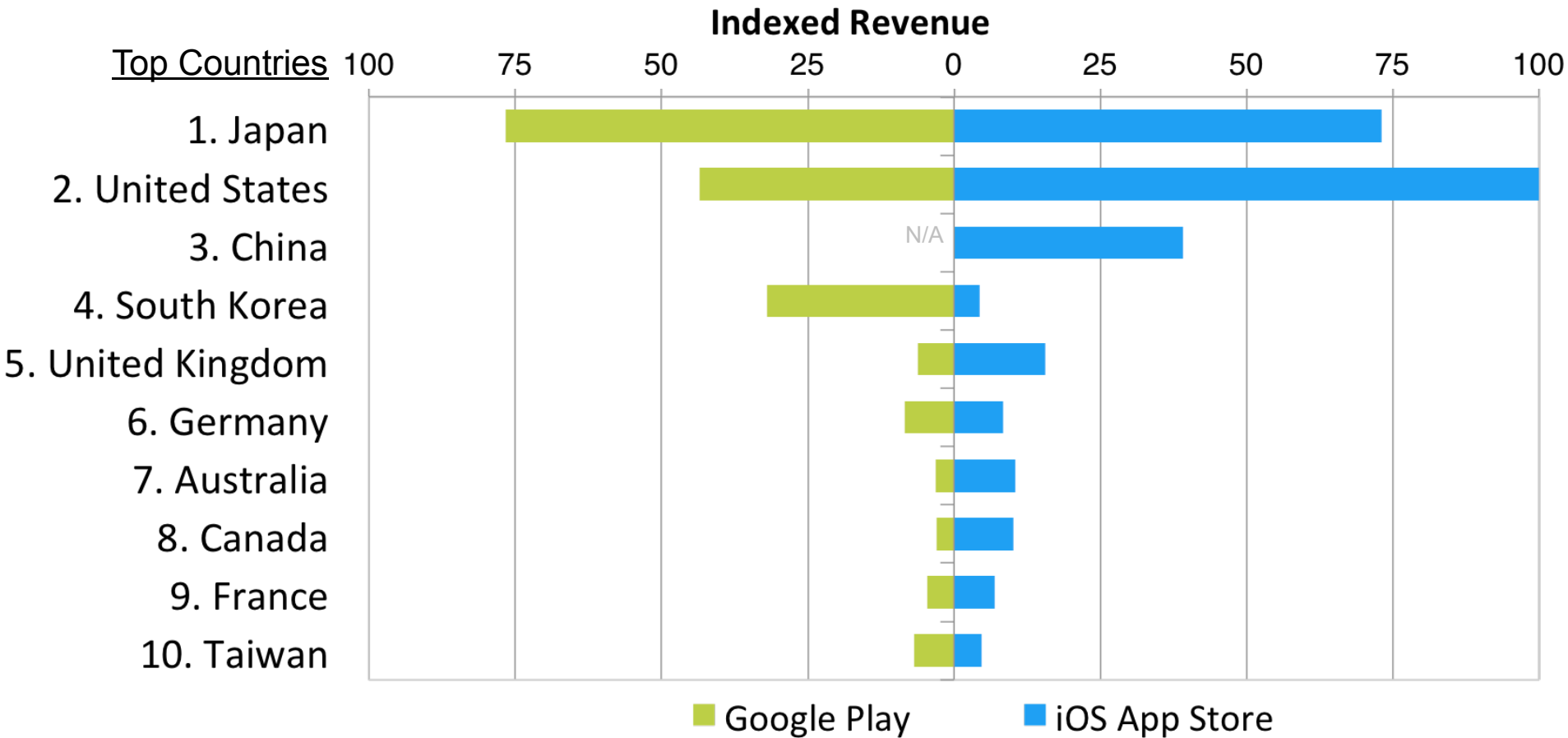
App Annie



App Store Downloads by Country, December 2014



App Store Revenue by Country, December 2014



- United States, Japan, and South Korea drove nearly 70% of Google Play revenue
- Asia-Pacific is well-represented in the Top 10 countries by revenue

How are the markets shifting in the iOS App Store?

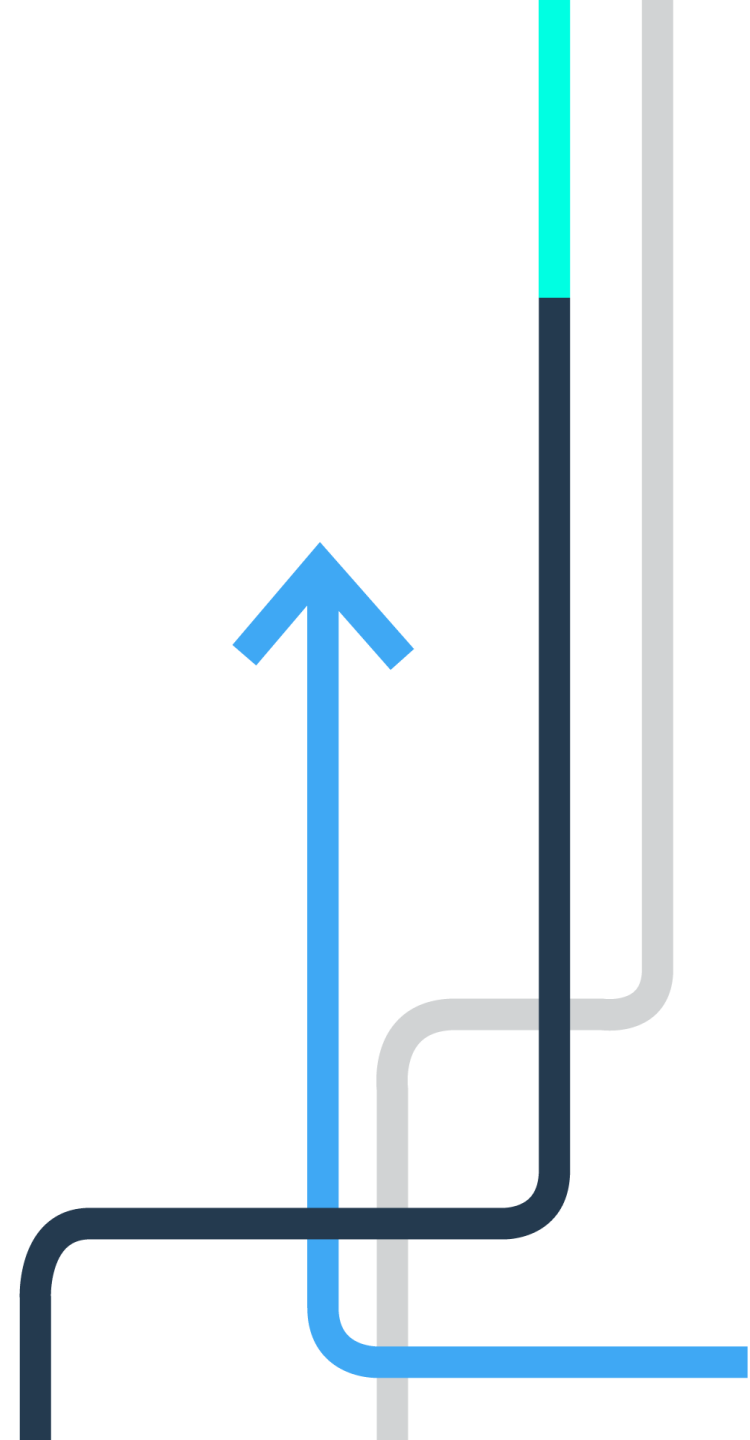
Rank by Downloads			Rank by Revenue	
<u>Rank</u> <u>Dec 2014</u>	<u>Country</u>	<u>Chg vs.</u> <u>Dec 2013</u>	<u>Country</u>	<u>Chg vs.</u> <u>Dec 2013</u>
1	United States	-	United States	-
2	China	-	Japan	-
3	Japan	↑1	China	-
4	United Kingdom	↓1	United Kingdom	-
5	Russia	-	Australia	-
6	France	-	Canada	-
7	Canada	-	Germany	-
8	Germany	-	France	-
9	Australia	-	Russia	-
10	Brazil	↑3	Taiwan	↑2

How are the markets shifting in Google Play?

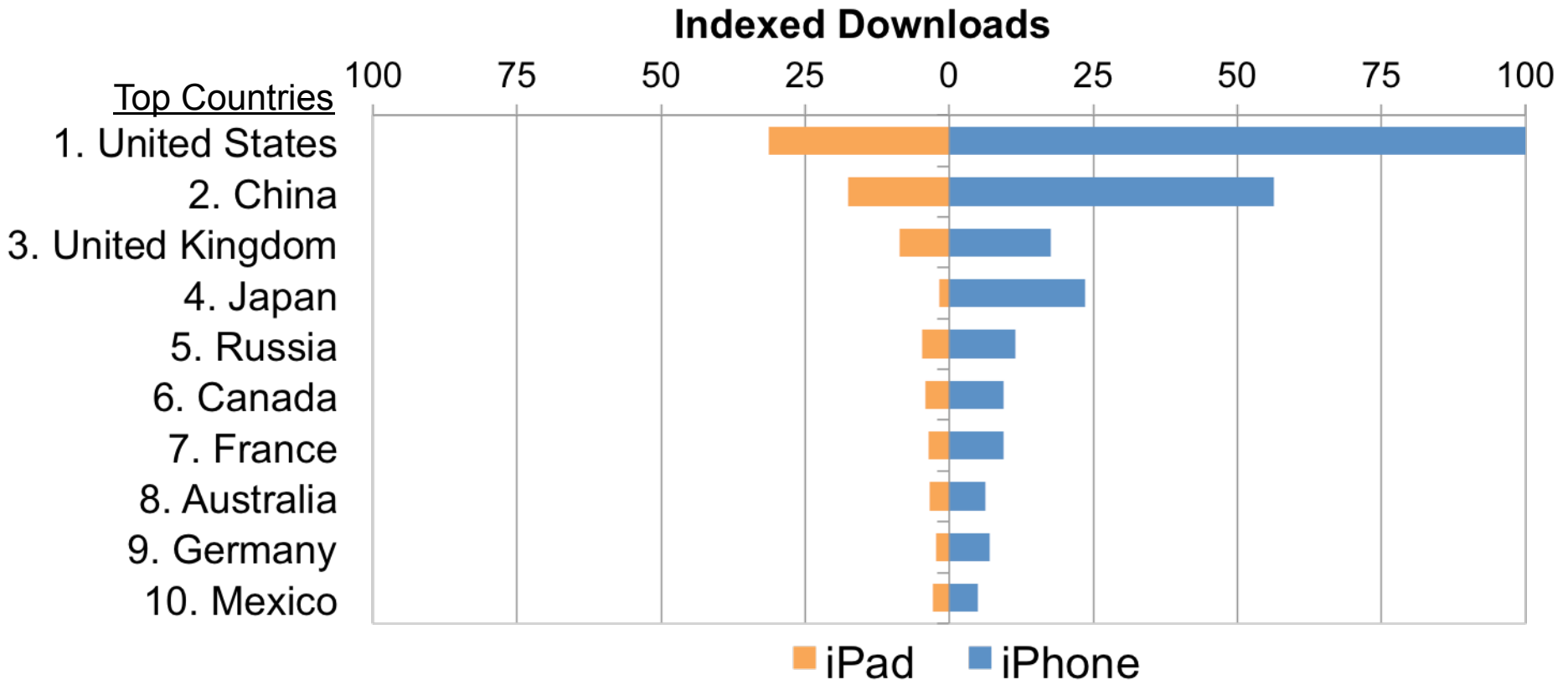
Rank by Downloads			Rank by Revenue	
<u>Rank</u> <u>Dec 2014</u>	<u>Country</u>	<u>Chg vs.</u> <u>Dec 2013</u>	<u>Country</u>	<u>Chg vs.</u> <u>Dec 2013</u>
1	United States	-	Japan	-
2	Brazil	↑1	United States	-
3	Russia	↑1	South Korea	-
4	India	↑1	Germany	-
5	Mexico	↑1	Taiwan	↑1
6	South Korea	↓4	United Kingdom	↓1
7	Indonesia	↑2	France	-
8	Turkey	↑2	Hong Kong	↑1
9	Germany	↓2	Australia	↓1
10	Thailand	↑4	Canada	↑1

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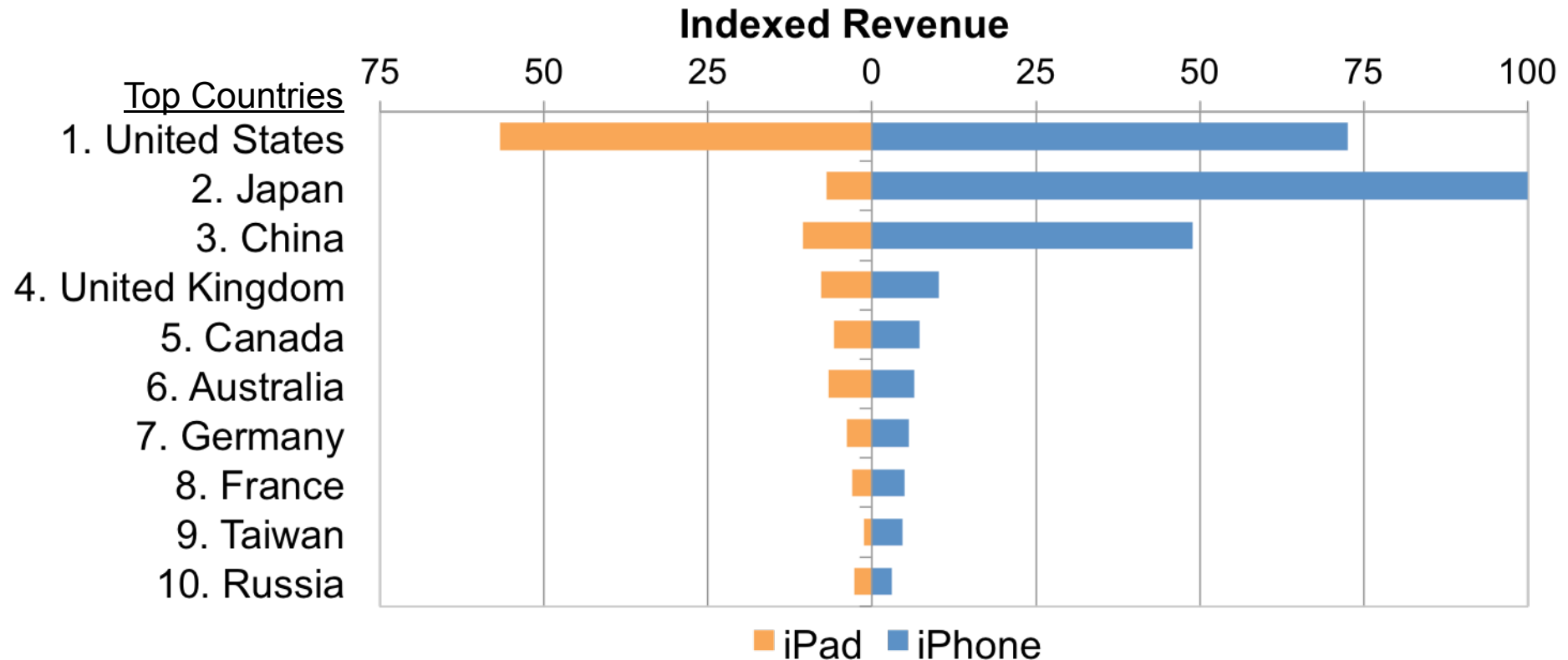


Game Downloads by iOS Devices, December 2014



- Over 25% of all iOS App Store game downloads were for the iPad
- Japan had minimal iPad usage, while United Kingdom saw nearly 33% of its iOS game downloads come from iPad

Game Revenue by iOS Devices, December 2014

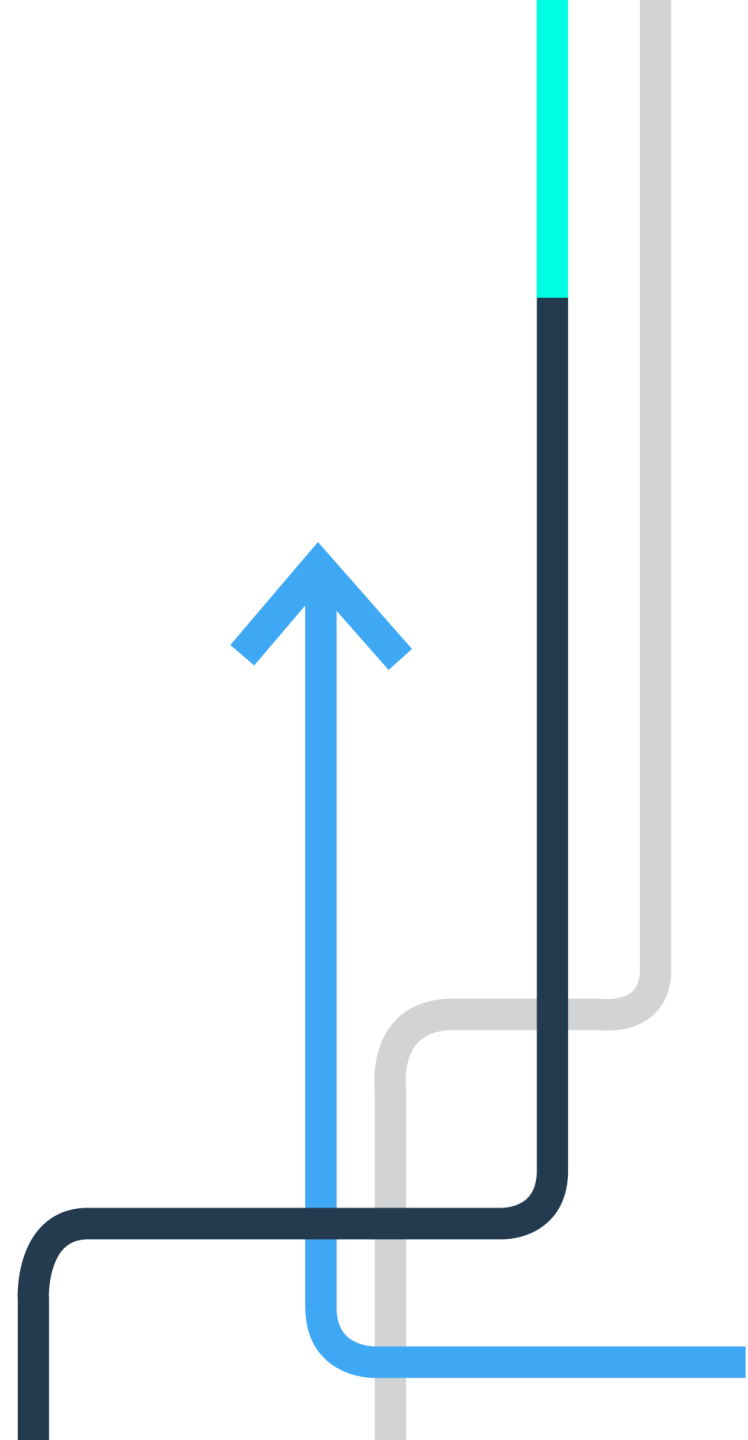


- iPad drove about 30% of iOS App Store game revenue worldwide
- US drove over 40% of worldwide iPad game revenue, the leading market by far

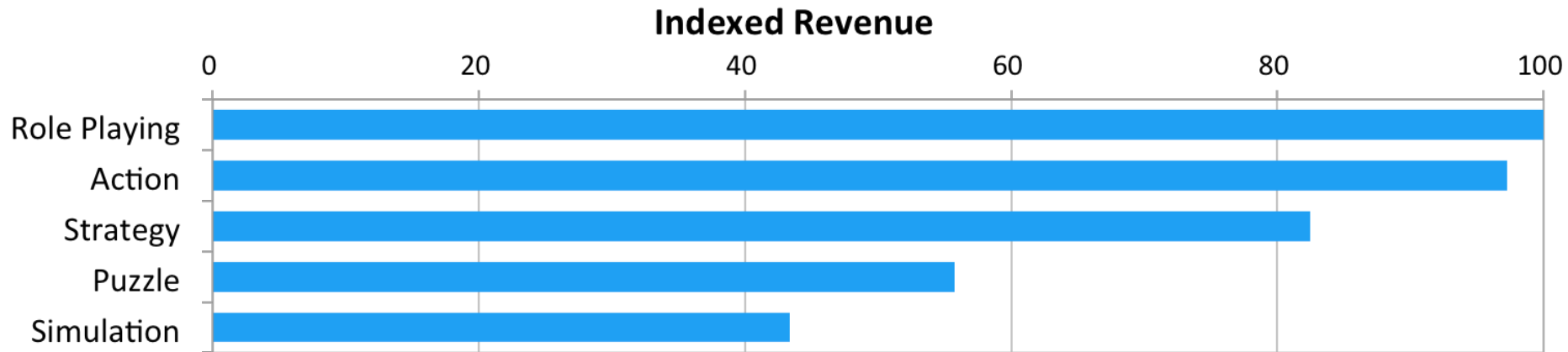
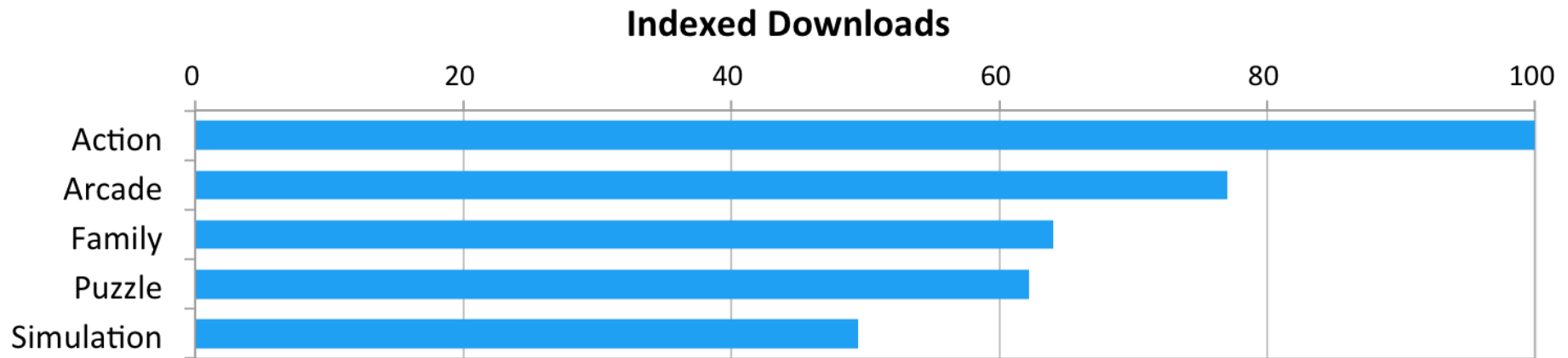
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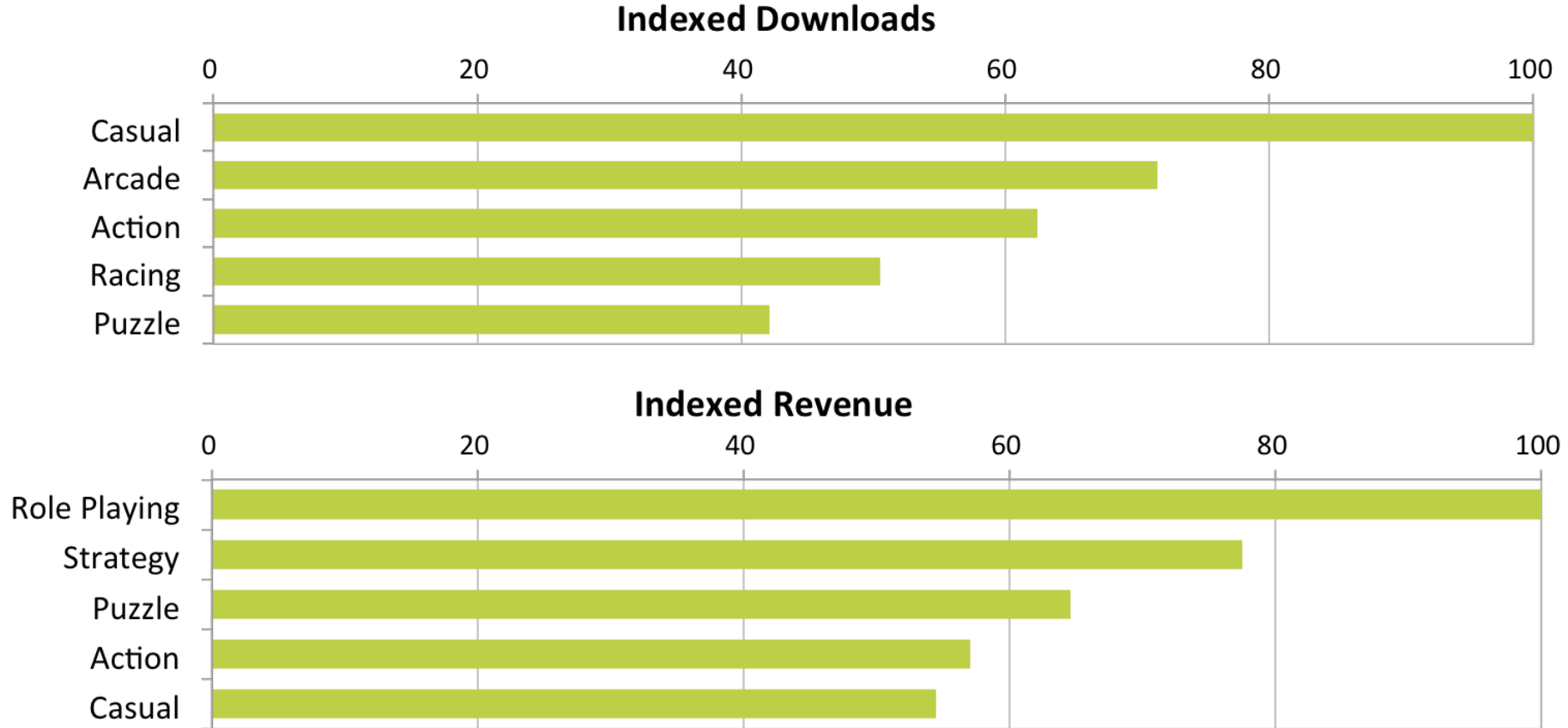


iOS: Top Game Subcategories, December 2014



*In the iOS App Store, a game can be put in up to two subcategories. As a result, there is overlap among the subcategories.

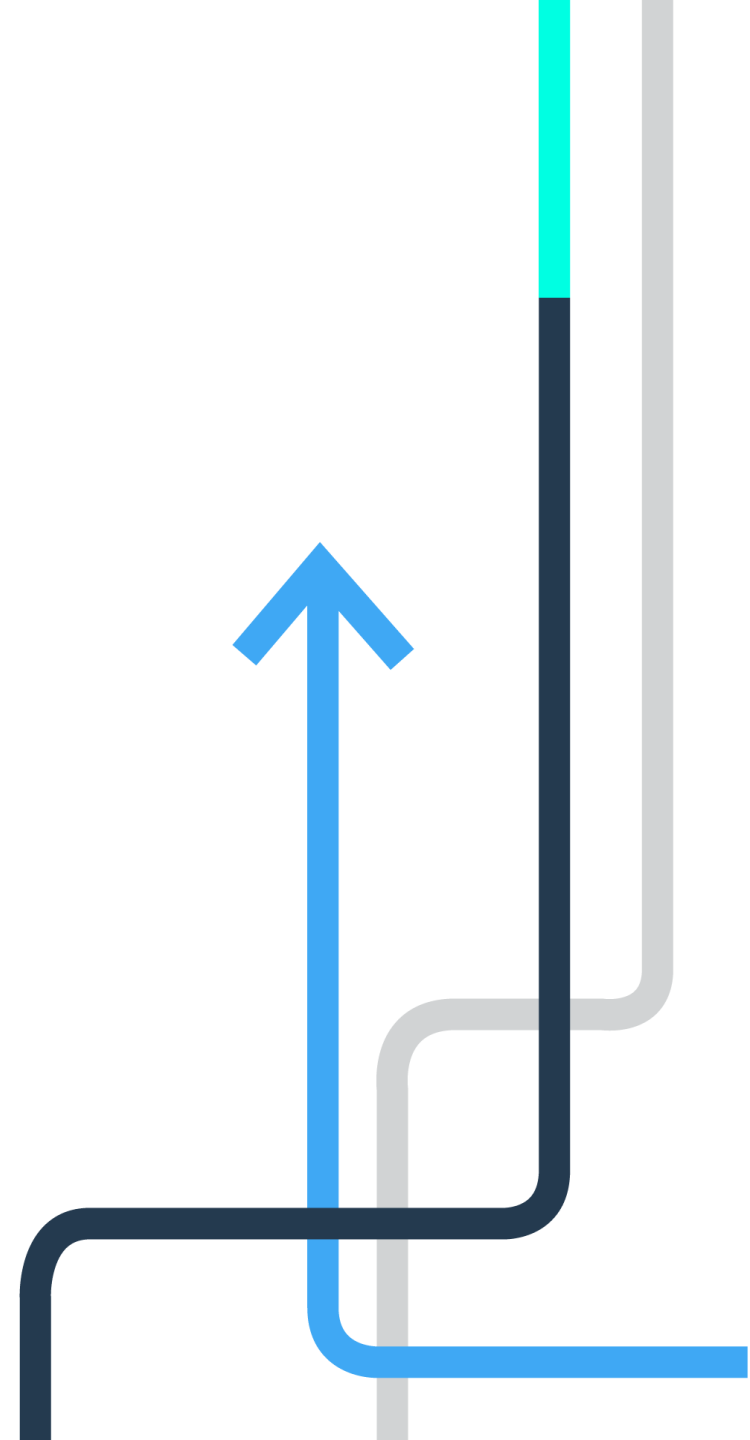
iOS: Top Game Subcategories, December 2014
























- Casual and Arcade Google Play game subcategories led downloads, but Role Playing and Strategy subcategories generated more revenue

Game Trends in Taiwan and Worldwide

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



Top Games Worldwide - December 2014

#	By Downloads			Company
1		Candy Crush Soda Saga	=	King 
2		Subway Surfers	▲1	Kiloo 
3		Trivia Crack	▲38	Etermax 
4		My Talking Angela	▲	Outfit7 
5		Candy Crush Saga	▼3	King Tencent (腾讯)  
6		My Talking Tom	▼1	Outfit7 
7		Dumb Ways to Die 2	▲15	Metro Trains 
8		Clash of Clans	▼2	Supercell 
9		Despicable Me	=	Gameloft 
10		Stick Hero	▼6	Ketchapp Studio 

#	By Revenue			Company
1		Clash of Clans	=	Supercell 
2		Puzzle & Dragons (パズル&ドラゴンズ)	=	GungHo Online (ガンホー・オンライン) 
3		Monster Strike (モンスターストライク)	=	Tencent (腾讯)  Mixi (ミクシイ) 
4		Candy Crush Saga	=	King  Tencent (腾讯) 
5		Game of War - Fire Age	=	Machine Zone 
6		Candy Crush Soda Saga	▲6	King 
7		Disney Tsum Tsum (ディズニー ツムツム)	▼1	LINE (ライン) 
8		Hay Day	▼1	Supercell 
9		Everybody's Marble (모두의마블 for Kakao)	=	LINE (ライン)  Netmarble (넷마블)  Tencent (腾讯) 
10		Farm Heroes Saga	▼2	King 

Top Game Companies Worldwide - December 2014

#	By Downloads		Headquarters	Apps
1	 King	=		29
2	 Gameloft	=		199
3	 Electronic Arts	=		845
4	 Ketchapp Studio	▲1		61
5	 Outfit7	▲10		66
6	 Doodle Mobile (涂鸦移动)	▲2		107
7	 Rovio	▼3		66
8	 Zynga	▲3		112
9	 Glu	▼2		246
10	 Supercell	▼1		7

#	By Revenue		Headquarters	Apps
1	 Supercell	=		7
2	 King	=		29
3	 GungHo Online (ガンホー・オンライン)	=		96
4	 Mixi (ミクシィ)	▲1		60
5	 LINE (ライン)	▼1		176
6	 Tencent (腾讯)	=		328
7	 Electronic Arts	▲2		845
8	 COLOPL (コロプラ)	▼1		453
9	 Machine Zone	▼1		14
10	 SQUARE ENIX (株式会社スクウェア・エニックス)	▲8		284

Source: App Annie Intelligence











Top Games in Taiwan - December 2014

#	By Downloads		Company
1	 Everybody's Marble (모두의마블 for Kakao) =		Netmarble (넷마블)  LINE (라인)  Tencent (腾讯) 
2	 BloodLine (血族) New Release		37Wan  Shanda (盛大网络) 
3	 League of Angels (女神联盟) ▲▲		Youzu (游族)  ICAN (艾肯娛樂) 
4	 Thunder Fighter (雷霆战机) ▲▲		Garena Online  Tencent (腾讯) 
5	 Ninja Coming (忍者Q傳) ▲▲		Longtu Game (龙图游戏) 
6	 Monster Strike (モンスターストライク) ▲4		Tencent (腾讯)  Mixi (ミクシィ) 
7	 LINE God of War New Release		EFUN (易幻網絡科技有限公司) 
8	 Candy Crush Soda Saga ▼6		King 
9	 Soul sword (三国战神) New Release		Ghostgames (고스트게임즈)  NQ Mobile  Cheetah Mobile (猎豹移动) 
10	 Reverse World (疾风勇者传) ▲30		Gameone (智傲)  Chukong (触控科技) 

#	By Revenue		Company
1	 Everybody's Marble (모두의마블 for Kakao) ▲1		Netmarble (넷마블)  LINE (라인)  Tencent (腾讯) 
2	 Dot Arena (刀塔传奇) ▼1		Fun Plus Game  Longtu Game (龙图游戏)  GAEA Mobile (盖娅网络科技) 
3	 Tower of Saviors (神魔之塔) ▲1		Tencent (腾讯)  Mad Head 
4	 LINE Rangers ▼1		LINE (라인) 
5	 Pili Heroes (霹靂江湖) ▲59		WINKING (唯晶數位娛樂) 
6	 Summoners War (서머너즈 워) ▼1		GAMEVIL ((주)게임빌) 
7	 決戰神魔 ▼1		iWPlay (艾玩天地)  Perfect World (完美世界) 
8	 Clash of Clans ▲1		Supercell 
9	 Candy Crush Saga ▼1		King  Tencent (腾讯) 
10	 LINE God of War New Release		EFUN (易幻網絡科技有限公司) 

Source: App Annie Intelligence

Top Game Companies in Taiwan - December 2014


#	By Downloads		Headquarters	Apps
1	 LINE (ライン)	=		176
2	 2FunFun (趣玩网络)	▲28		20
3	 Chukong (触控科技)	▲10		119
4	 King	▼2		29
5	 Longtu Game (龙图游戏)	▲9		22
6	 GAMEVIL ((주)게임빌)	▼1		300
7	 Gameloft	▲1		199
8	 Kalends (昆仑万维集团)	▼4		140
9	 37Wan	▲		24
10	 EFUN (易幻網絡科技有限公司)	▼4		101

#	By Revenue		Headquarters	Apps
1	 LINE (ライン)	=		176
2	 Longtu Game (龙图游戏)	=		22
3	 Mad Head	=		17
4	 Kalends (昆仑万维集团)	=		140
5	 GAMEVIL ((주)게임빌)	=		300
6	 EFUN (易幻網絡科技有限公司)	=		101
7	 WINKING (唯晶數位娛樂)	▲47		10
8	 Happy Elements (乐元互动)	▼1		57
9	 King	=		29
10	 iWPlay (艾玩天地)	=		7

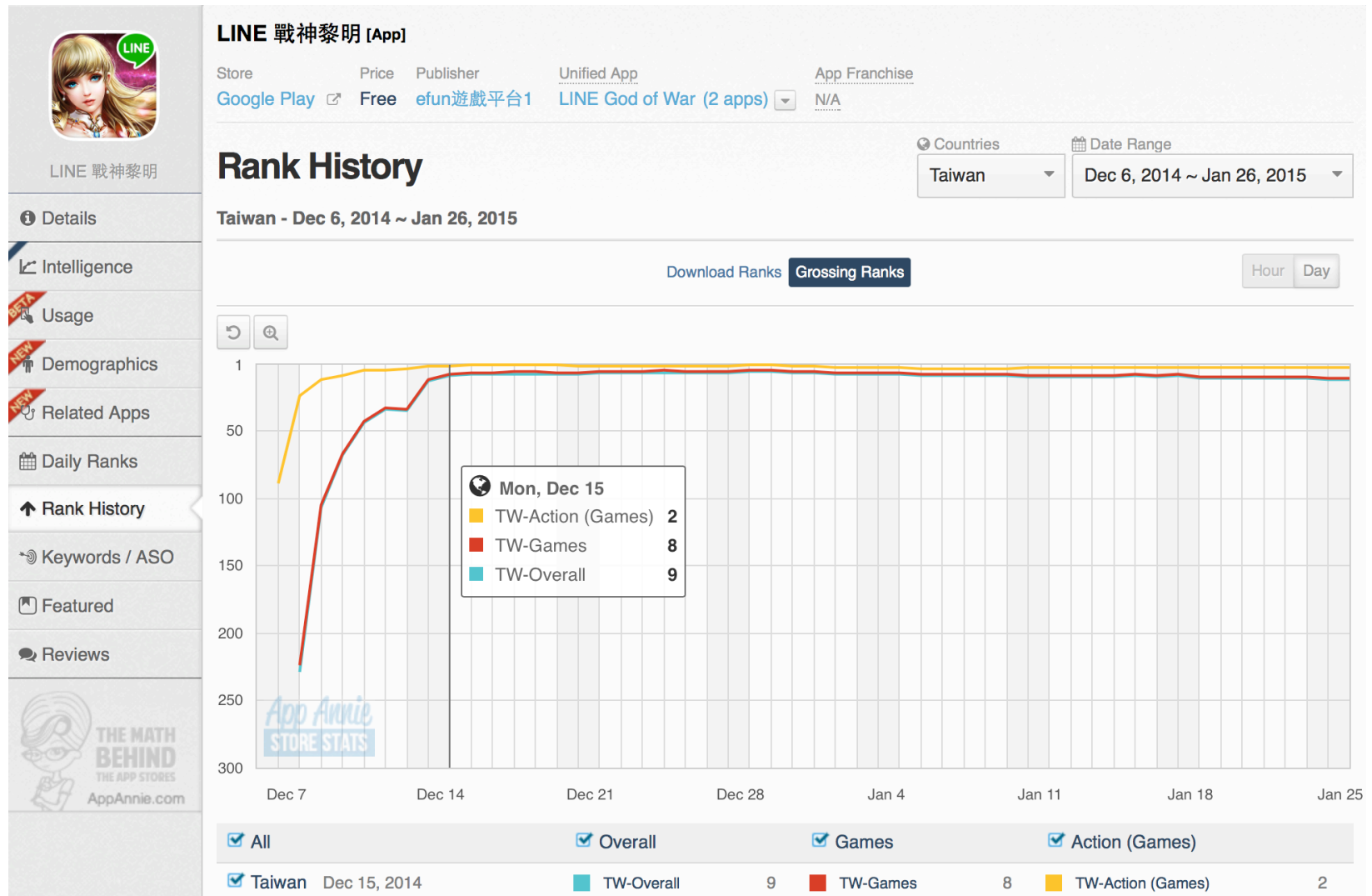
Source: App Annie Intelligence

Taiwan Mobile Game Highlights

Three types of mobile games are prevailing in Taiwan

- **LINE Games:** 
 - The most popular social app, **LINE** grant superb discoverability to games
 - Of Taiwan's population of 23 million, 17 million+ are registered users
 - **LINE** Game started with **casual / puzzle games**, sometimes with **strong IP**
 - Attracted **non-gamers** on the PC / console platforms (e.g. housewives)
 - Targeting **higher ARPD**, LINE started to roll out **content-heavy** games
 - **LINE God of War (LINE 戰神黎明)** is the 1st game on the LINE platform that not by LINE itself
 - This help **LINE** secure content-heavy products faster and easier

Taiwan Mobile Game Highlights

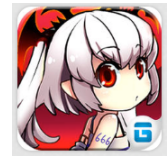
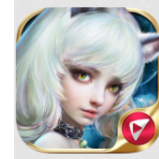


- **LINE God of War took only about 1 week to jump into the top 10 by revenue with the help of LINE platform**

Taiwan Mobile Game Highlights

Three types of mobile games are prevailing in Taiwan

- Chinese games with online PC games roots:
 - Taiwan is a major online PC games (include web game) market
 - Chinese publishers established capacity in Taiwan in the past
 - In the smartphone era, the capacity was easily diverted to mobile games publishing and operation
 - There is large user base of hard-core MMORPG, MOBA and web games
 - They formed the new market of adapted mobile games

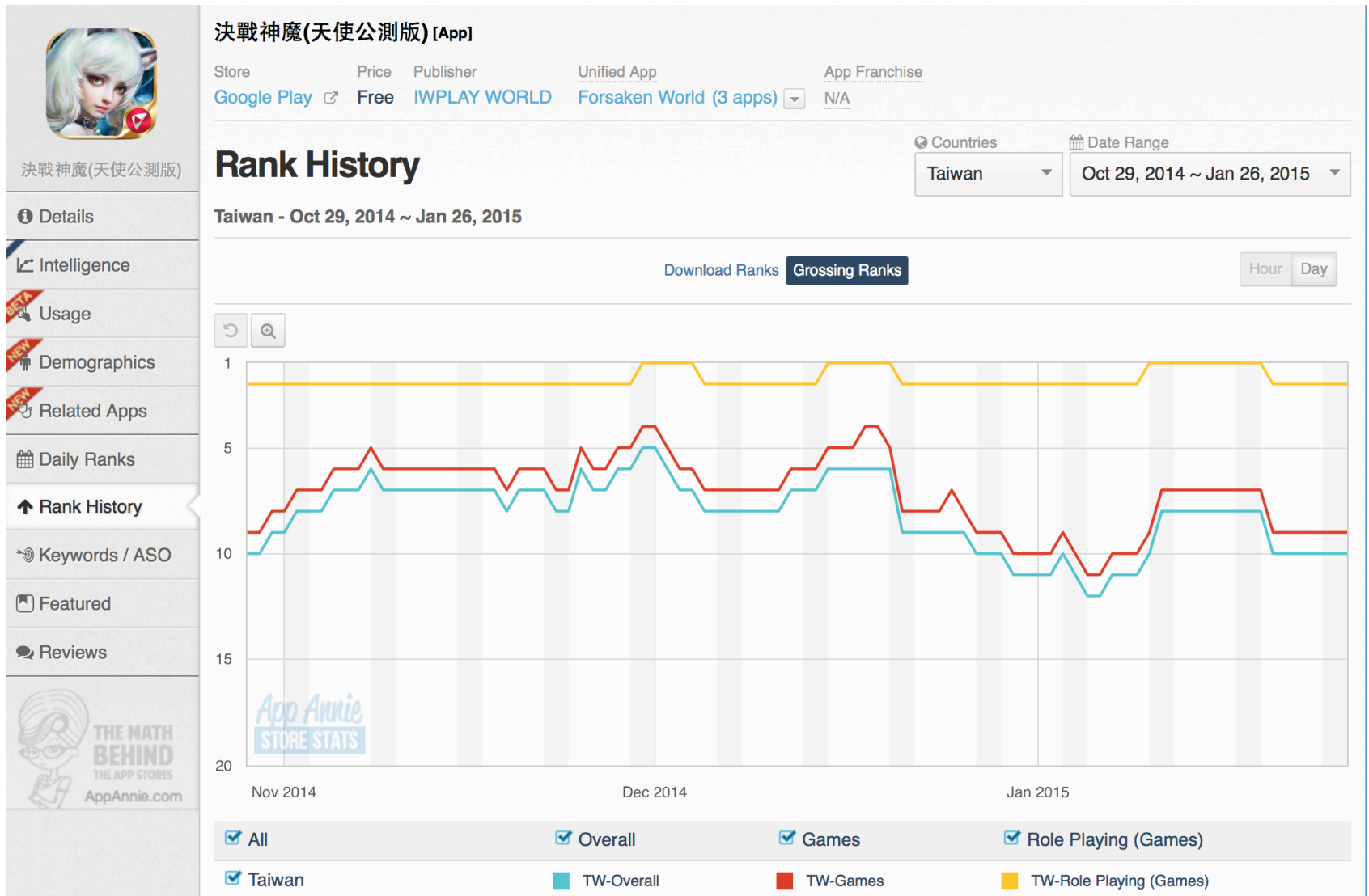


- Global leading games:



- They achieved top by revenue only with organic growth in Taiwan
- Taiwan could be a growth market if they invest in user acquisition

Taiwan Mobile Game Highlights

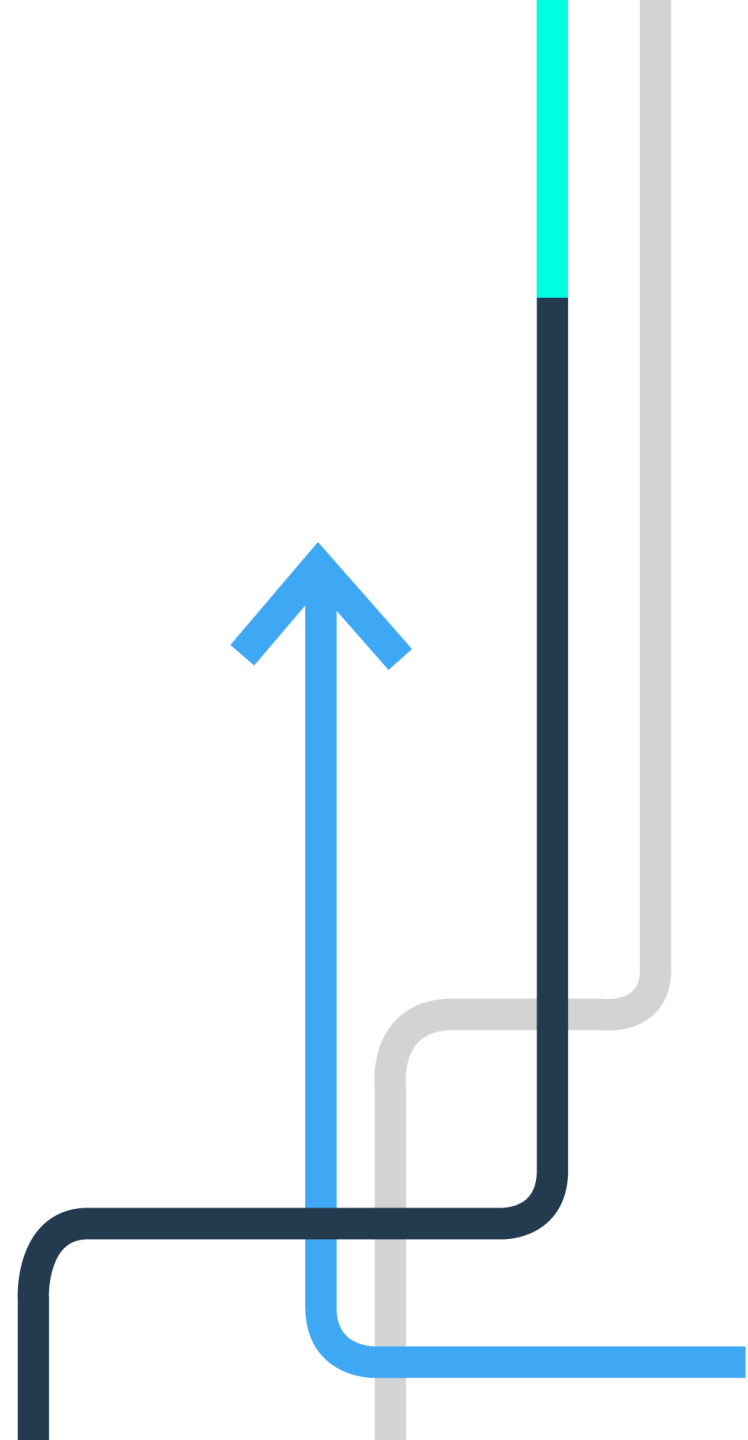


- **Forsaken World** was a famous MMORPG title by Perfect World; It inherited the hard-core gameplay from the PC version and kept staying in the top 10

App Economy in Taiwan and Worldwide

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Top Taiwanese Publishers by Performance in Taiwan, December 2014

By Combined iOS and Google Play Downloads

Rank

Publisher

1	Userjoy
2	MixerBox
3	Kuro Times
4	WINKING
5	iStargame
6	Iwplay
7	CyberLink
8	Gamesofa
9	Hope Joy
10	GigaMedia

By Combined iOS and Google Play Revenue

Publisher

WINKING
iWPlay
iStargame
9Splay Entertainment
Userjoy
Kuro Times
9388
Gamesofa
7725
International Game System

Top Taiwanese Publishers by Performance Outside of Taiwan, December 2014

By Combined iOS and Google Play Downloads

Rank

Publisher

1	XPEC
2	CyberLink
3	Cardinal Blue
4	Orangenose
5	MixerBox
6	AZSoft Technology
7	Chi-Chi
8	WaGame
9	CloudMosa
10	Kdan

By Combined iOS and Google Play Revenue

Publisher

iWPlay
Rayark
XPEC
Gamesofa
International Game System
Unalis
iStargame
7725
Kuro Times
SNSplus

Top Taiwanese Publishers by Worldwide Growth, November - December 2014

By Combined iOS and Google Play Downloads

Rank

Publisher

1	Userjoy
2	Unalis
3	Hope Joy
4	XPEC
5	CyberLink
6	Kdan
7	SNSplus
8	WaGame
9	AZSoft Technology
10	Cardinal Blue

By Combined iOS and Google Play Revenue

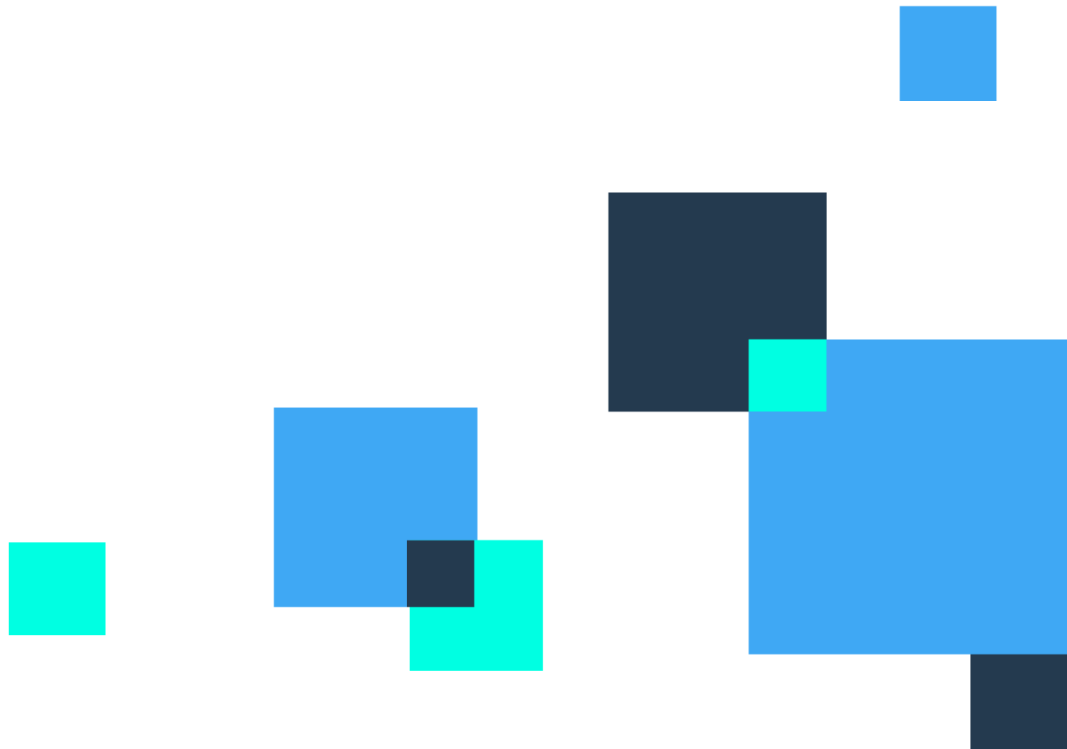
Publisher

X-Legend
iWPlay
Auer Media & Entertainment
9388
FUN MOBI
Kuro Times
iStargame
Goodgame
Kdan
9Splay Entertainment

Note: The growth is evaluated by the parent company's monthly cumulative growth rate based on the downloads or revenue estimation of App Annie Intelligence. A publisher must have total downloads of more than 100,000 within November 2014 to qualify for the downloads chart and total revenue of more than US\$ 50,000 of revenue within November 2014 to qualify for the revenue chart.

Quiz Time!

App Annie



Quiz (1/3)

Q: Game revenue percentage in iOS vs GP, Which one is higher (Dec. 2014)?

Quiz (1/3)

Q: Game revenue percentage in iOS vs GP, Which one is higher (Dec. 2014)?

A: GP, ~90%

Quiz (2/3)

Q: What's Taiwan's Global ranking in GP Revenue Dec. 2014?

Quiz (2/3)

Q: What's Taiwan's Global ranking in GP Revenue Dec. 2014?

A: No. 5

Quiz (3/3)

Q: What's Taiwan's best performing Company in oversea revenue Dec. 2014?

Quiz (3/3)

Q: What's Taiwan's best performing Company in oversea revenue Dec. 2014?

A: 艾玩天地 (iWPlay)

Thank you!

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