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— 汇量科技 —

# 全球化格局下的使命

段 威



# 移动互联网全球化的三个阶段

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# 全球化1.0时代 大国出海



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# 全球化2.0时代

## 多国链接

### 区域市场分析

#### Japan<sup>1</sup>

| Rank | App Name                       | HQ          | Category |
|------|--------------------------------|-------------|----------|
| 1    | LINE                           | South Korea | Social   |
| 2    | Animal Crossing: Pocket Camp   | Japan       | Game     |
| 3    | Yahoo! JAPAN                   | Japan       | Content  |
| 4    | DELISH KITCHEN                 | Japan       | Utility  |
| 5    | AbemaTV                        | Japan       | Content  |
| 6    | Instagram                      | US          | Social   |
| 7    | SNOW                           | Korea       | Utility  |
| 8    | Kurashiru Krasil               | Japan       | Utility  |
| 9    | QR code reader plus for iPhone | Japan       | Utility  |
| 10   | Yahoo! Weather                 | Japan       | Utility  |
| 11   | Twitter                        | US          | Social   |
| 12   | Spotify Music                  | Sweden      | Content  |
| 13   | McDonald's Japan               | Japan       | Others   |
| 14   | Google Translate               | US          | Utility  |
| 15   | Yahoo! Transit                 | Japan       | Utility  |
| 16   | Disney zumutrum land           | Japan       | Utility  |
| 17   | Facebook                       | US          | Social   |
| 18   | Tver                           | Japan       | Content  |
| 19   | GANMA!                         | Japan       | Content  |
| 20   | Piccoma                        | Japan       | Content  |

#### Singapore<sup>1</sup>

| Rank | App Name           | HQ        | Category |
|------|--------------------|-----------|----------|
| 1    | WhatsApp Messenger | US        | Social   |
| 2    | oBike              | Singapore | Other    |
| 3    | Grab               | Singapore | Other    |
| 4    | Messenger          | US        | Social   |
| 5    | Uber               | US        | Other    |
| 6    | Facebook           | US        | Social   |
| 7    | Mobile Legends     | China     | Game     |
| 8    | Instagram          | US        | Social   |
| 9    | WeChat             | China     | Social   |
| 10   | ofo                | China     | Other    |
| 11   | Nestia             | Singapore | Other    |
| 12   | Carousell          | Singapore | Shopping |
| 13   | Spotify Music      | US        | Content  |
| 14   | Healthy 365        | Singapore | Utility  |
| 15   | YouTube            | US        | Content  |
| 16   | Google Translate   | US        | Utility  |
| 17   | Wish               | US        | Shopping |
| 18   | Lazada             | Singapore | Shopping |
| 19   | Foodpanda          | Germany   | Other    |
| 20   | SHAREit            | China     | Utility  |

#### Thailand<sup>1</sup>

| Rank | App Name         | HQ          | Category |
|------|------------------|-------------|----------|
| 1    | Messenger        | US          | Social   |
| 2    | LINE             | South Korea | Social   |
| 3    | Facebook         | US          | Social   |
| 4    | Garena RoV       | Singapore   | Game     |
| 5    | JOOX Music       | China       | Content  |
| 6    | Instagram        | US          | Social   |
| 7    | Camera360        | China       | Utility  |
| 8    | Lazada           | Singapore   | Shopping |
| 9    | YouTube          | US          | Content  |
| 10   | Shopee           | Singapore   | Shopping |
| 11   | B612             | South Korea | Utility  |
| 12   | BeautyPlus       | China       | Utility  |
| 13   | Mobile Legends   | China       | Game     |
| 14   | K PLUS           | Thailand    | Utility  |
| 15   | TrueMoney Wallet | Thailand    | Utility  |
| 16   | BeeTalk          | Singapore   | Social   |
| 17   | Google Translate | US          | Utility  |
| 18   | SNOW             | South Korea | Utility  |
| 19   | SCB EASY         | Thailand    | Utility  |
| 20   | LINE TV          | South Korea | Content  |

#### Indonesia<sup>1</sup>

| Rank | App Name           | HQ          | Category |
|------|--------------------|-------------|----------|
| 1    | WhatsApp Messenger | US          | Social   |
| 2    | SHAREit            | China       | Utility  |
| 3    | Messenger          | US          | Social   |
| 4    | Instagram          | US          | Social   |
| 5    | Facebook Lite      | US          | Social   |
| 6    | BBM                | China       | Social   |
| 7    | Facebook           | US          | Social   |
| 8    | UC Browser         | China       | Utility  |
| 9    | Grab               | Singapore   | Other    |
| 10   | Mobile Legends     | China       | Game     |
| 11   | LINE               | South Korea | Social   |
| 12   | UC News            | China       | Content  |
| 13   | Shopee             | Singapore   | Shopping |
| 14   | GO-JEK             | Indonesia   | Other    |
| 15   | JOOX Music         | China       | Content  |
| 16   | Sing! by Smule     | US          | Content  |
| 17   | Opera Mini         | Norway      | Utility  |
| 18   | UC Browser Mini    | China       | Utility  |
| 19   | Google Play Games  | US          | Game     |
| 20   | Lazada             | Singapore   | Shopping |

Notes: 1. Rank by downloads in iOS and Google Play Stores in the selected country in 2017.

Source: iResearch Analysis

# 全球化2.0时代

## 多国链接

UBER amazon Google  
f twitter ebay Zillow  
YAHOO! Groupon King

PSafe FUN  
dafiti  
SUA NOVA LOJA DE CALÇADOS

ROCKETINTERNET ROVIO  
UBISOFT SUPRECELL FUN GOOD GAME  
LOVOO Space Ape  
ASOS discover fashion online

Yandex @mail.ru Gamelnsight

Tencent Alibaba.com  
360 Baidu 百度 Rakuten  
cheetahmobile 网易 NETEASE  
www.163.com  
京东 MI

RobiKwik Quikr  
flipkart.com paytm  
OLA MYNTRA.com  
snapdeal.com

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# 全球化3.0时代 强国崛起

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二战后美国的崛起

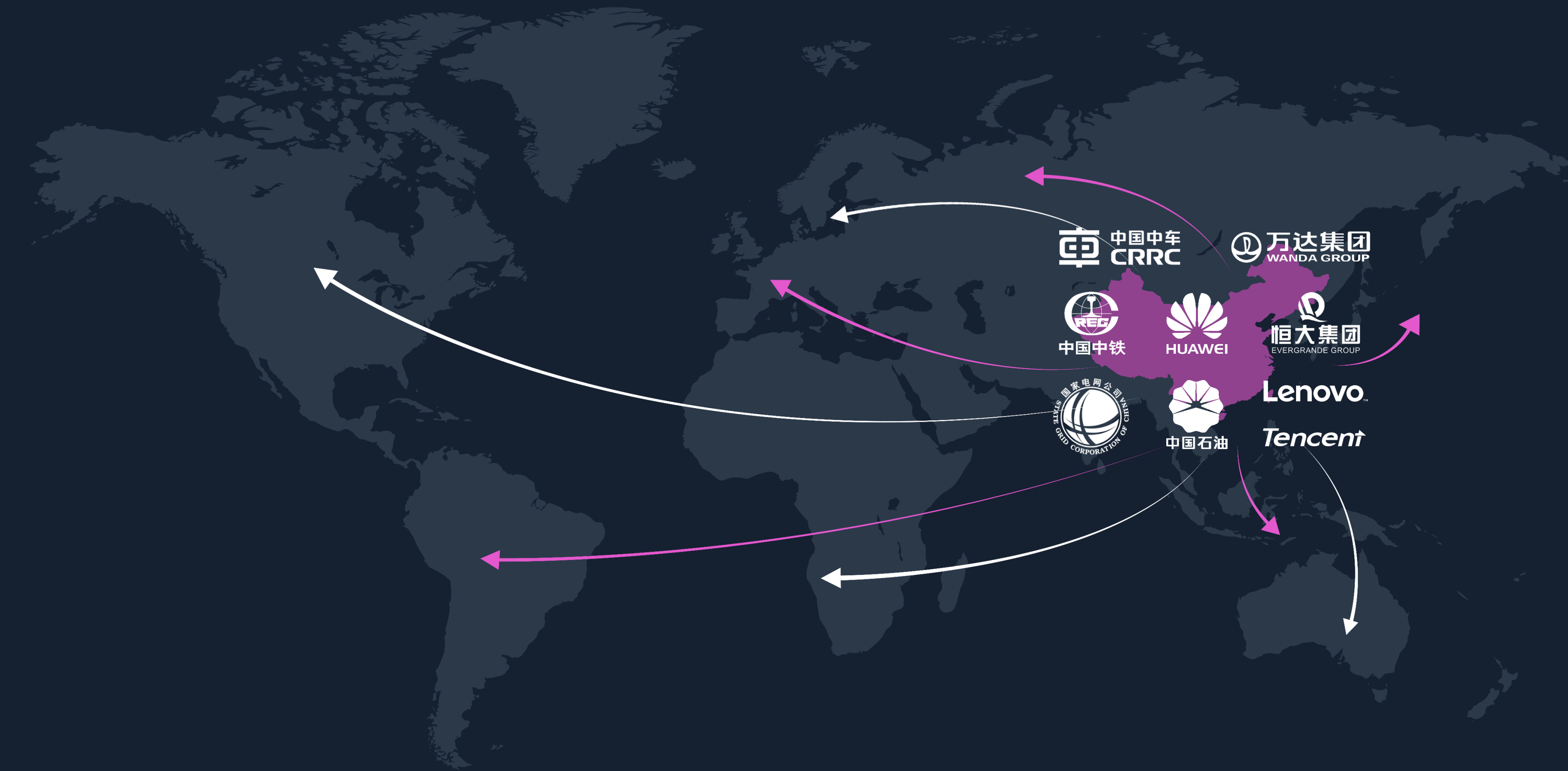


HOLLYWOOD



# 全球化3.0时代 强国崛起

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“一带一路”  
新时代新机遇

# 全球化3.0时代 强国崛起

## 中国移动应用 出海发展历程

2010

### 探索

少量工具进行出海探索，跨境贸易开始互联网化，进行电商尝试  
代表企业（产品）：网秦、UC

2012

### 工具

工具应用开始大规模海外探索  
出海企业以国内发展成熟、体量较大的企业为主  
代表企业：猎豹、360

2015

### 游戏

移动游戏出海规模化  
工具应用成熟用户形成规模、开始进行平台广告流量分发探索

2016

### 电商

国内电商加快“走出去”的步伐  
各类传统零售商、电商巨头、跨境电商新秀、供应链分销商等纷纷入局，加速跑马圈地。

2017

### 金融

中国金融科技市场迅猛发展，金融科技企业快速走向国际化、全球化，引领全球行业发展成为趋势

2018

### 新起点

在“一带一路”战略指引下，各行各业、线上和线下迎来“大航海时代”

# 专注服务全球化



广告主



用户获取



商业化



头部媒体



...



中小媒体



...

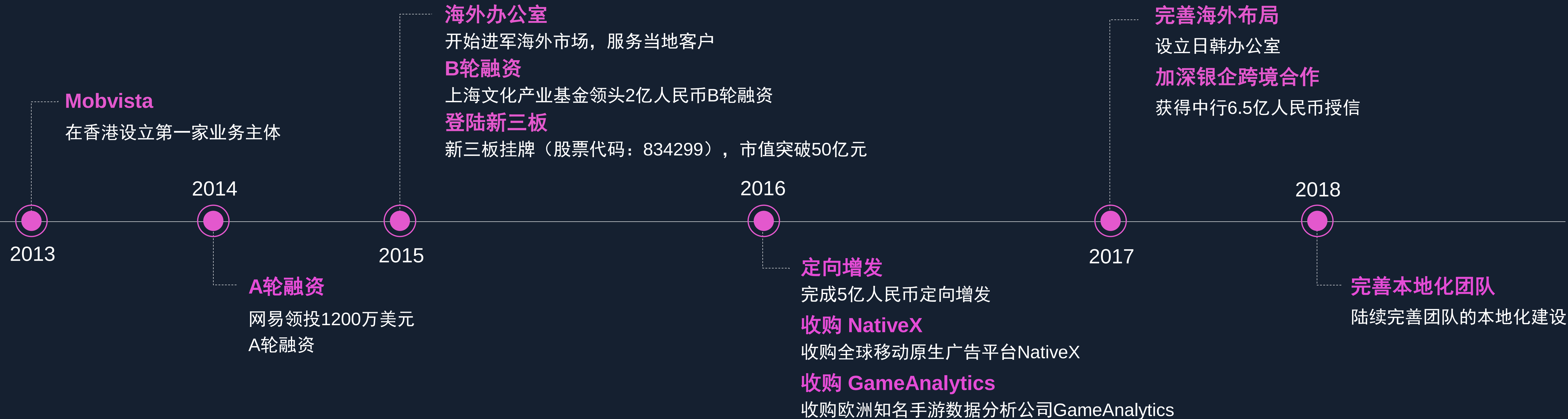


用户

商业智能分析



# 发展历程



# 全球部署



14 办公室

600+

集团员工

40%

来自技术研发团队

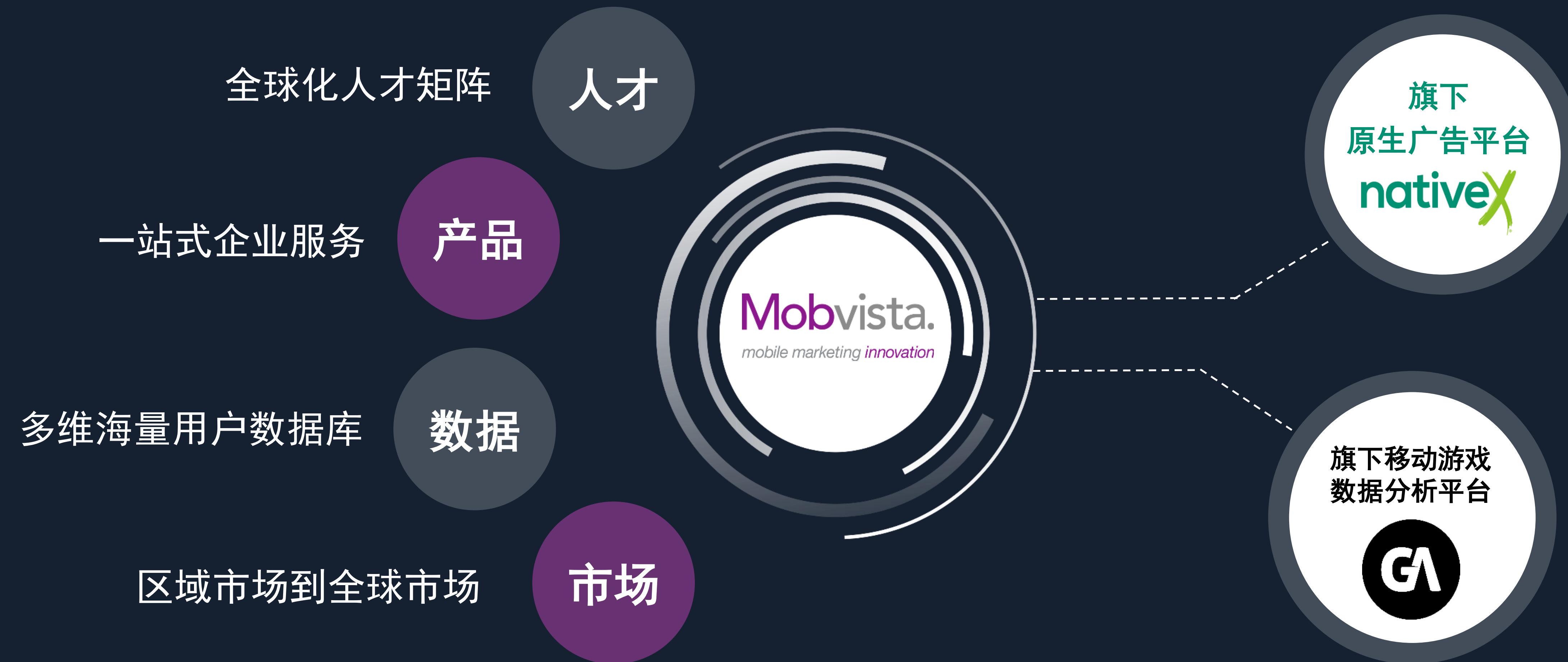
70亿

市值（人民币）

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# 资源整合

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