



# Web and Mobile as Growth Engines in APAC

## How to Foster Innovations through Partnerships and Policy Reforms

Barbara Navarro, Public Policy Director  
APAC, Middle East, Africa & Russia



# Defining Mobile First World

“I would give up \_\_ before my smartphone.”

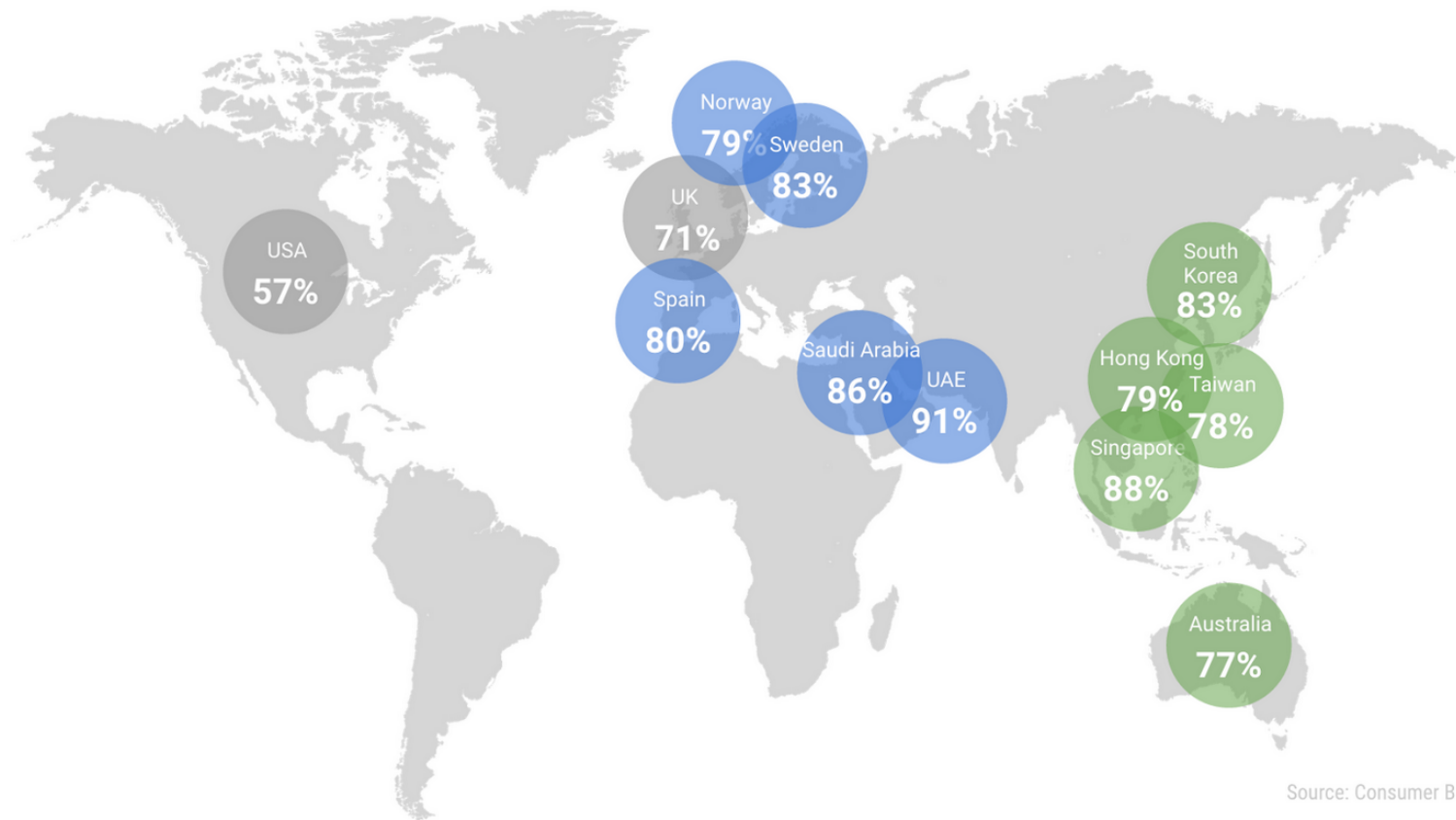
Percent of people in each country who said they'd rather keep their smartphone than forsake the following.

	Alcohol	Chocolate	Shower	Sat. Nav.	Coffee	Fast food	Exercise	Car	Sex
<b>Brazil</b>	76	59	8	78	60	72	43	24	12
<b>China</b>	86	82	37	79	85	78	45	56	36
<b>France</b>	69	66	5	77	61	86	42	23	16
<b>Germany</b>	77	70	10	77	55	89	45	23	16
<b>India</b>	70	64	36	71	63	67	44	38	33
<b>Indonesia</b>	89	78	78	76	75	73	52	34	34
<b>Japan</b>	70	86	17	86	74	85	60	44	56
<b>Russia</b>	80	76	14	85	70	88	50	36	15
<b>S. Africa</b>	77	74	13	81	63	80	49	10	22
<b>S. Korea</b>	69	84	25	74	70	83	50	43	41
<b>Turkey</b>	74	66	19	82	65	71	59	32	23
<b>U.K.</b>	65	78	17	84	76	91	47	21	25
<b>U.S.</b>	73	77	7	84	69	83	43	10	21

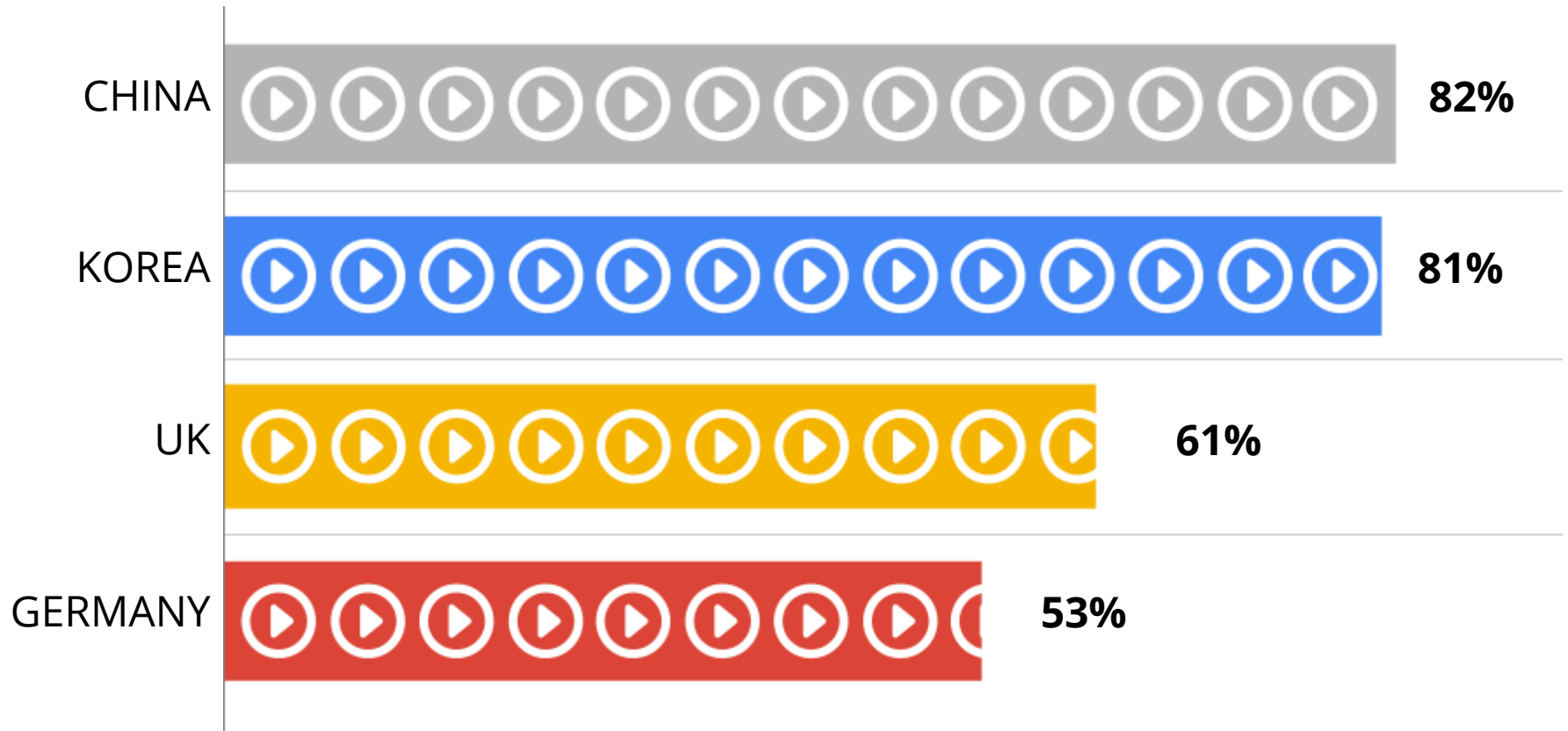
Source: “The Growth of the Mobile Internet Economy” Boston Consulting Group

# Asia: revolutionizing the mobile Internet for the rest of the world

Smartphone Penetration in Asia: 5 markets on the Top 10 list



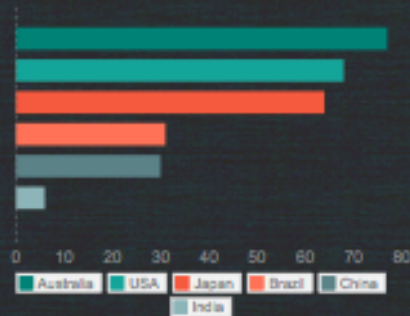
# Video on Smartphones



Source: **Consumer Barometer**  
([consumerbarometer.com](http://consumerbarometer.com))

# Australia's Mobile Economy

Smartphone penetration among people over 18

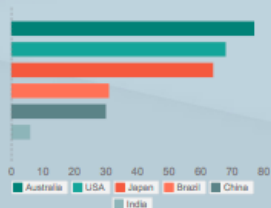


The mobile economy contributed \$21 billion in 2013, it will climb to \$30 billion in 2017.



## India's Mobile Economy

Smartphone penetration among people over 18



India's mobile Internet sector is growing at almost 40% per year

Mobile Internet economic activity will more than double from \$6 billion 2013 to \$14 billion in 2017.



## MOBILE ECONOMY IN KOREA

**40 BILLION USD**  
MOBILE ECONOMY IN 2017

**28 BILLION USD**  
MOBILE ECONOMY IN 2013



**74%**

SMARTPHONE PENETRATION HIT

# When Internet is... A Marketplace



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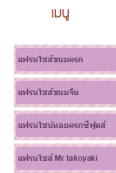
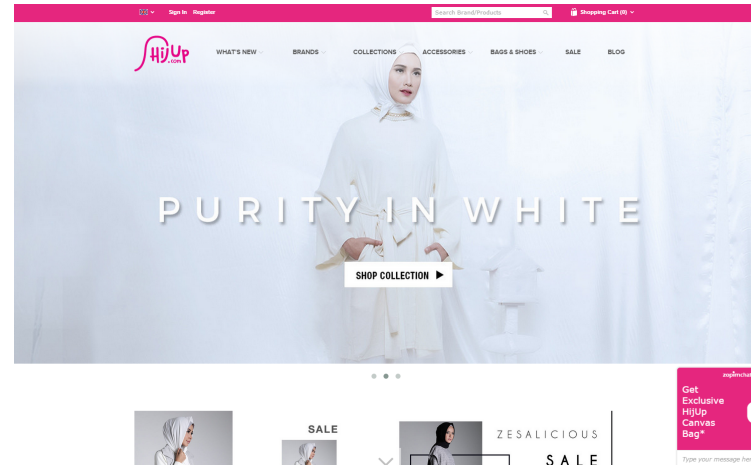
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안녕하세요! 두근두근 장난감입니다! 이번 따끈따끈 장난감을 드려요 이벤트에 참여해주신 분들에게 너무나 감사드립니다.^^ 모든 분들에게 선물을 드리고 싶지만...그렇지 못하진 죄송합니다.^^ 당첨되신 다섯 분을 공개합니다...

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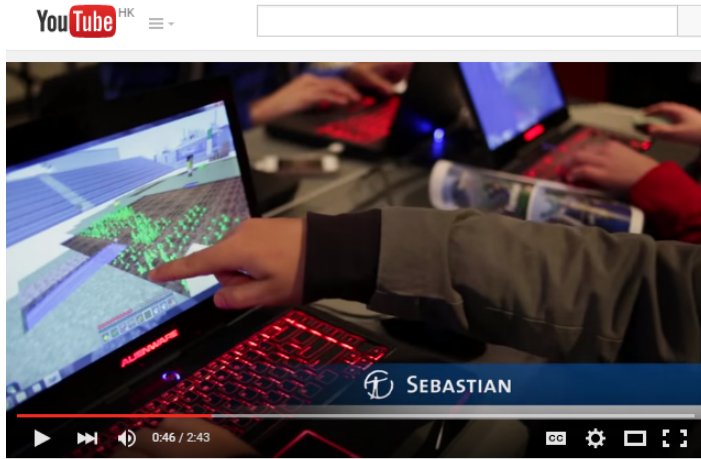
[KONGSUNI UNBOXING] 공순이 연박싱

공순이 하나둘셋 마트 계산대 연박싱 9:37  
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# When a Phone is... A Museum



American Museum of  
Natural History  
(United States)



Asian Civilisations Museum  
(Singapore)



When a phone is a virtual reality





# Enabling Regulation + Education

**Flexible regulatory environment is key:**

- 93% of Australian investors believe the legal environment has the most negative impact on their investing activities
- 72% of the surveyed investors felt uncomfortable about investing in the businesses where there are data localization requirements

Fifth Era & Engine, 2014

***Innovate + Educate***