

The logo for the GPU Technology Conference, featuring the text "GPU TECHNOLOGY CONFERENCE" in white on a green rectangular background. The background of the entire slide is a complex, colorful grid of glowing lines in shades of blue, green, and purple, resembling a circuit board or data network.

**GPU** TECHNOLOGY  
CONFERENCE

# Ecosystem Engineering:

How Apple, Google and Amazon are building their empires

Michael Vakulenko,  
VisionMobile  
March 2013

# VisionMobile | Ecosystem analysts

## Developer Economics

The biggest, most global developer research platform



## Mobile Innovation Economics

Thought-leading ecosystem economics



## Trends watch

Tracking app and developer trends



## Tier-1 clients

trusted by the top brand names in mobile



at&t

Telefonica

NOKIA

BlackBerry.



mozilla

## Digital ecosystem experts

Thought leaders in the economics of ecosystems and telecoms in the software era



## Media coverage

Global media reach

theguardian

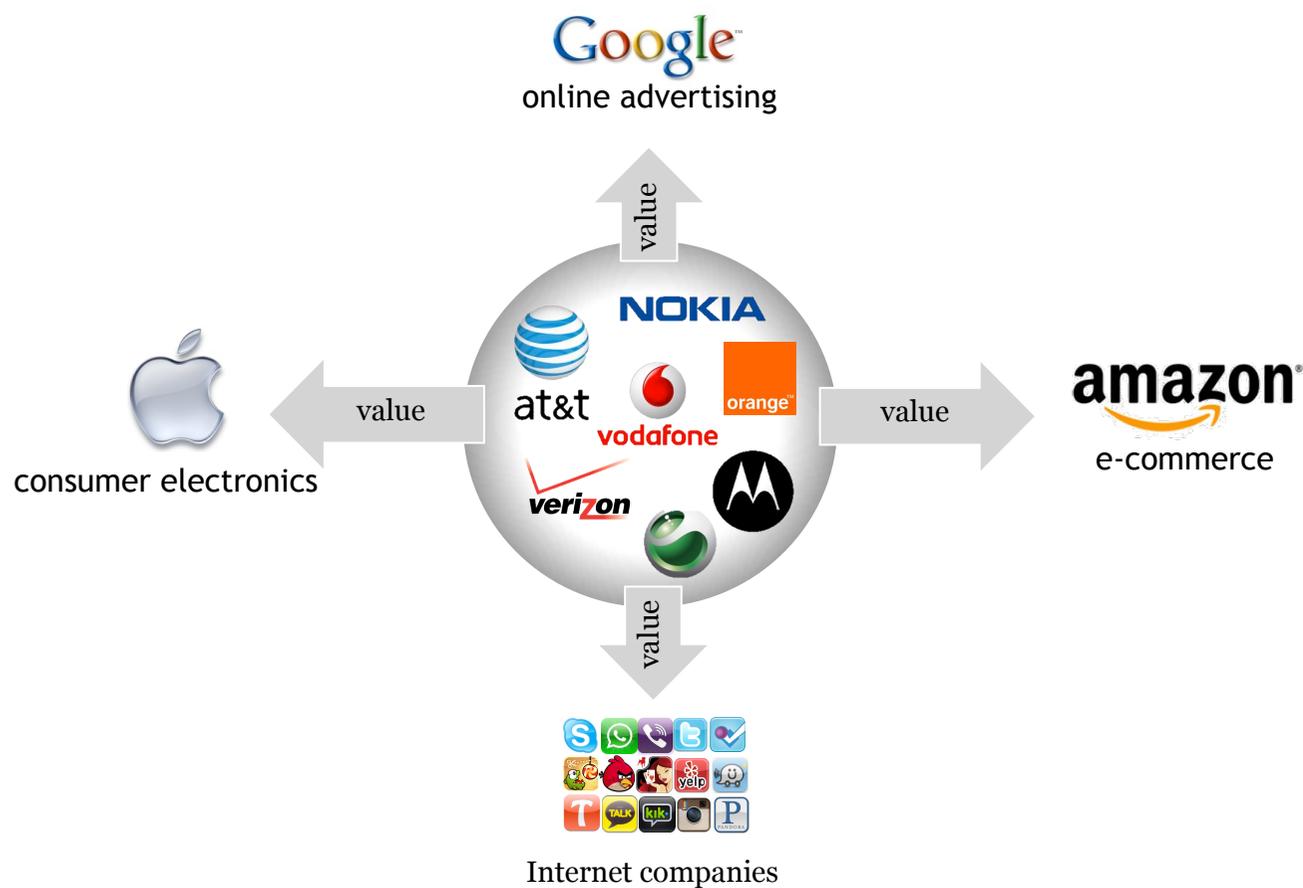
TechCrunch

WIRED IT



intomobile

# Mobile is being disrupted by asymmetric competition



# Apple media business - a \$8.5B empire?



apps, games



music, movies



magazines,  
newspapers



ebooks

Bigger than

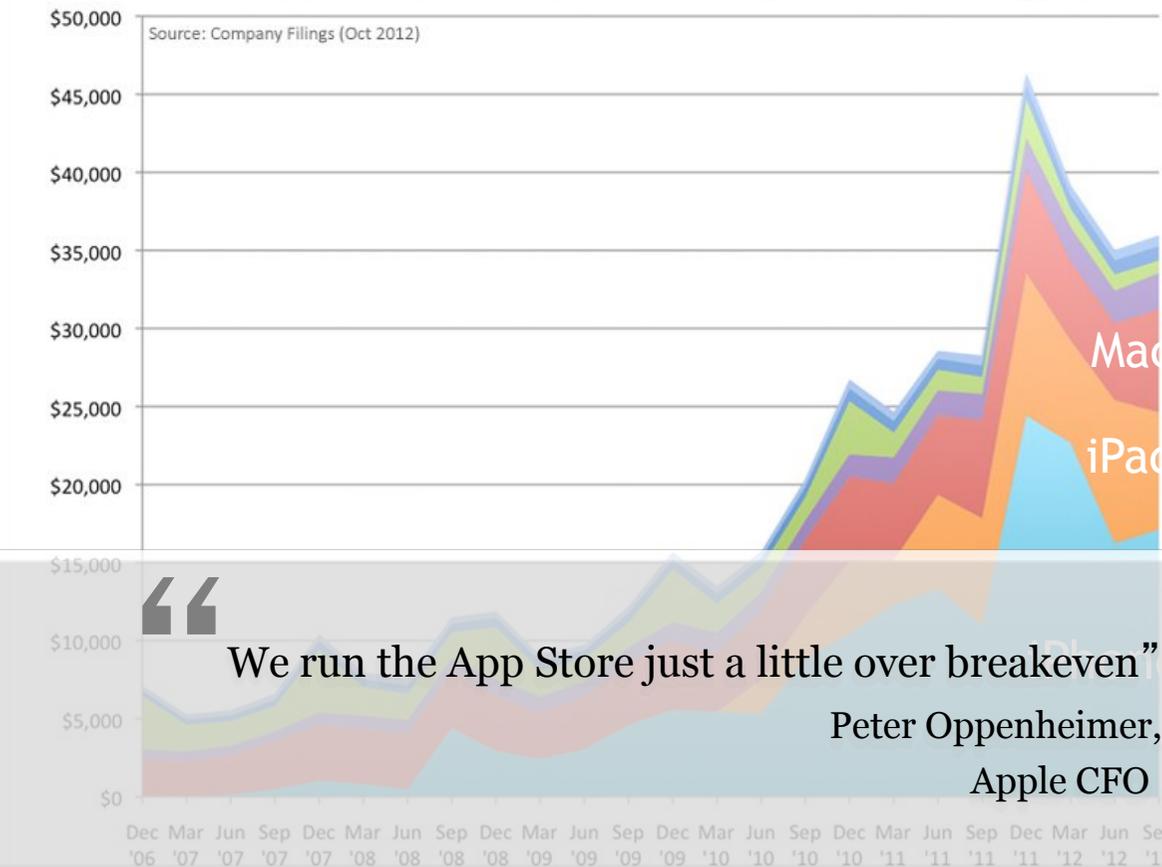


Time Inc.

combined

# Why Apple is in media business?

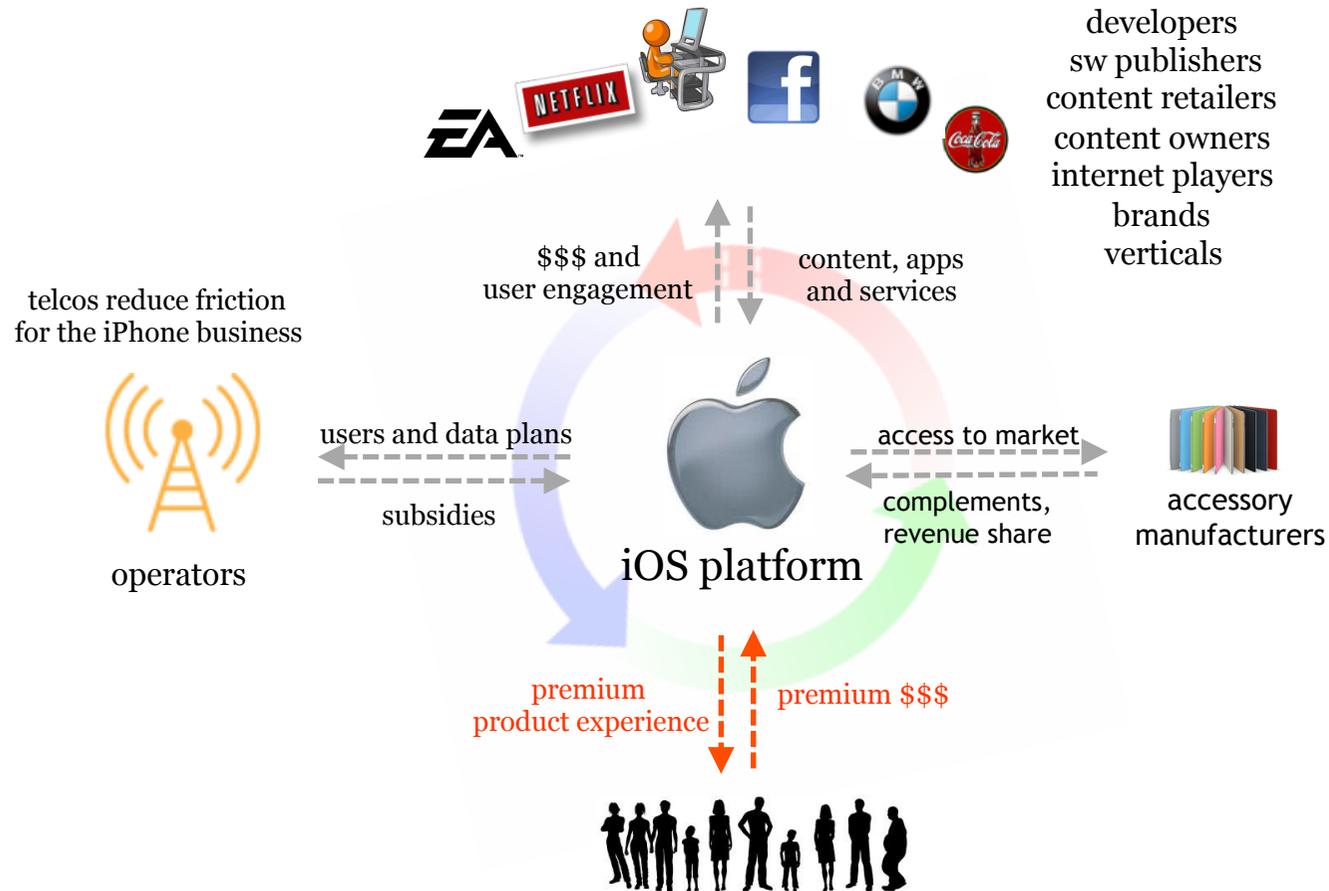
**Apple's Quarterly Revenue By Product Category**



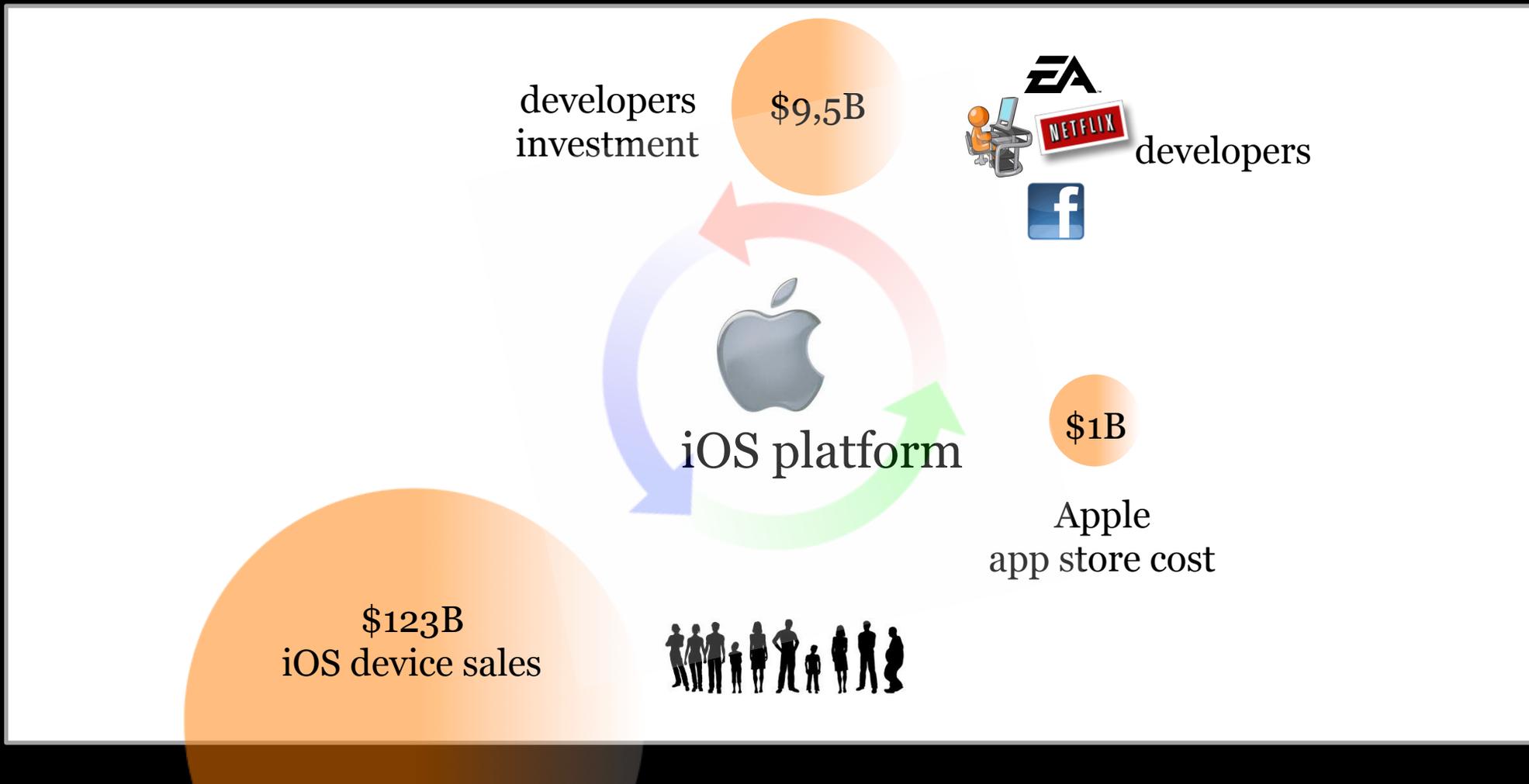
non-device revenues (music, apps, video, peripherals)

“We run the App Store just a little over breakeven”  
Peter Oppenheimer,  
Apple CFO

# The mechanics of iOS ecosystem



# Turning developers into investors (2012 figures)



# Google strategy pillars

- Flatten anything standing between eyeballs and ad inventory

Uses the economics of complements to increase the value of Google's core product. Android and Chrome strategies are examples.



- Expand the footprint of ad inventory

Across user journey by introducing new services like Gmail, Google Maps, YouTube, Google TV.

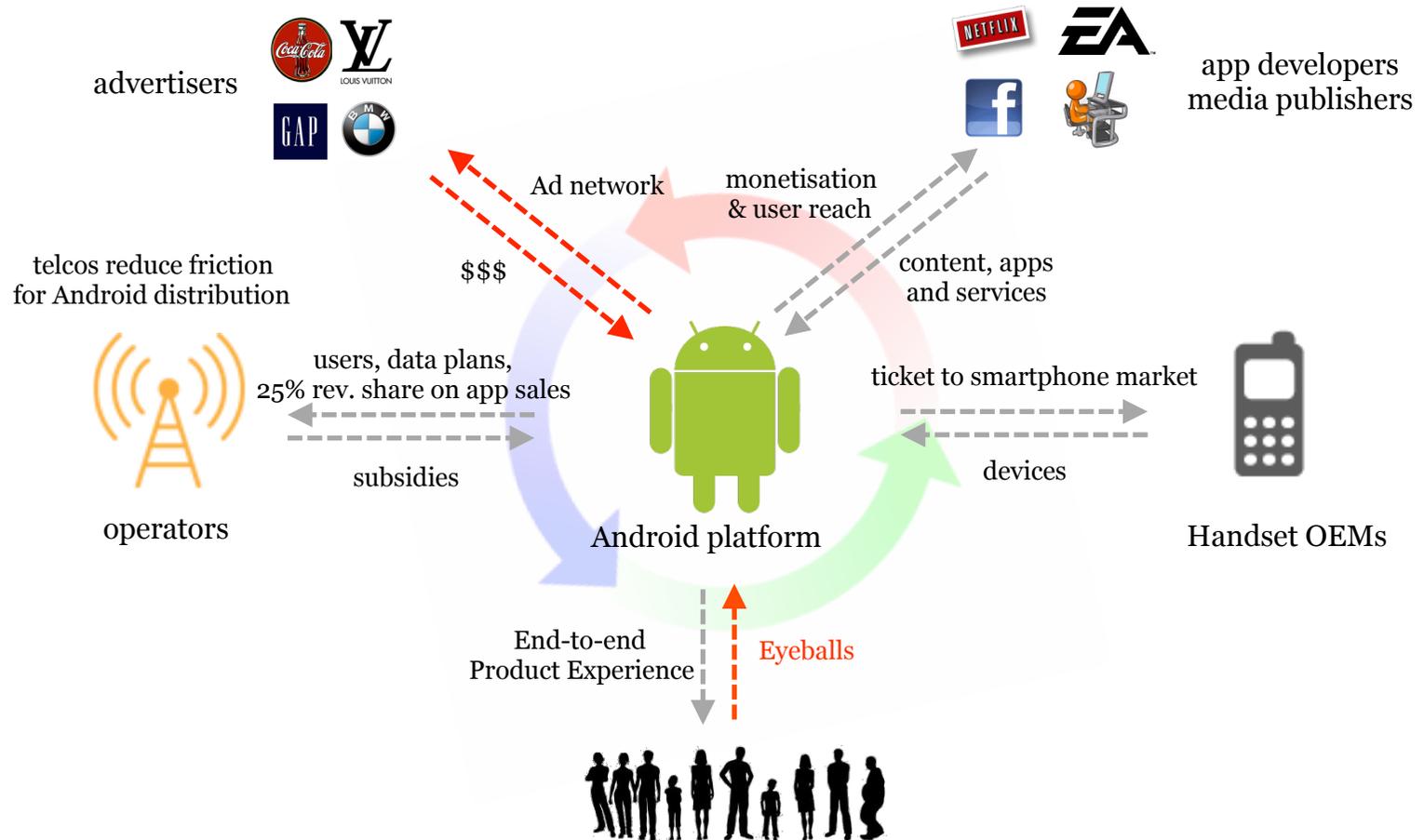


- Mine information on every user

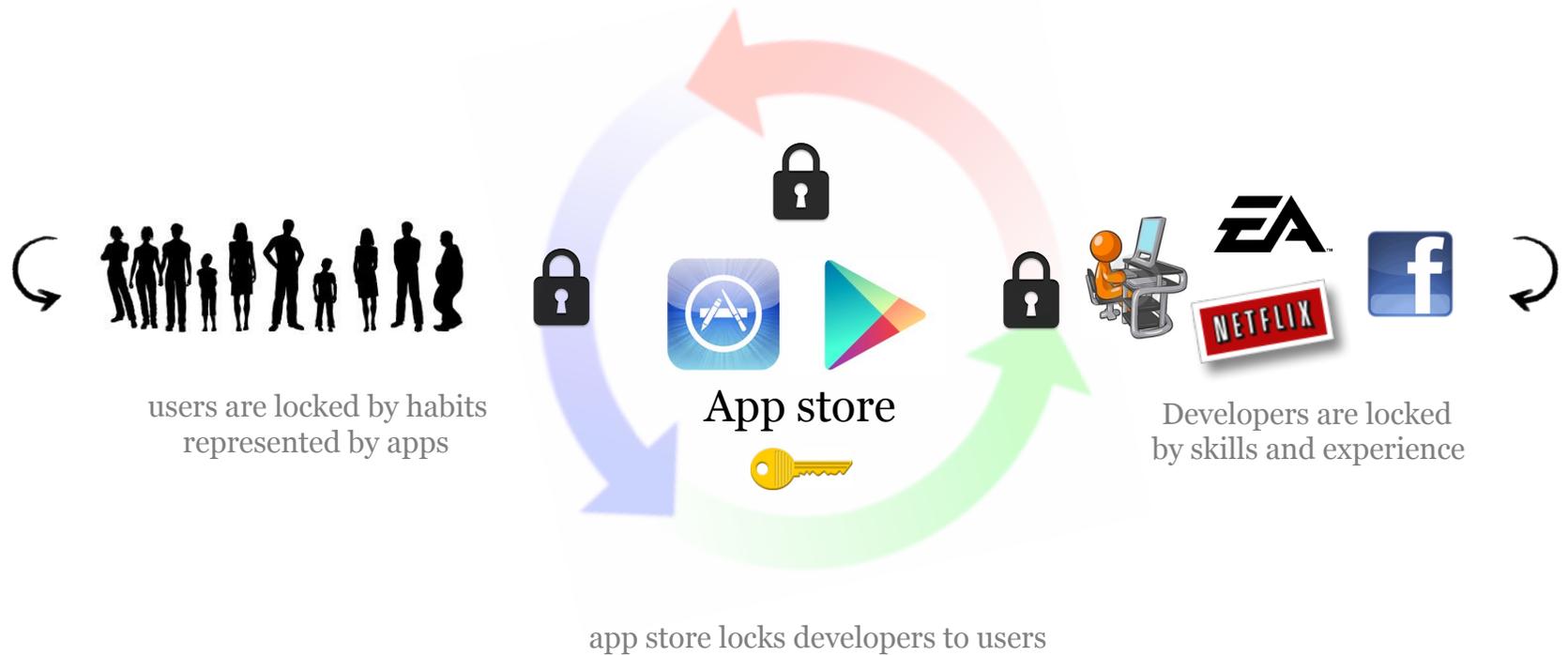
Helps Google to better micro-target users directly increasing the value of its inventory. Mobile payments will provide even more customer intelligence.



# The mechanics of Android ecosystem



# Google and Apple - Entrenched duopoly



Source: VisionMobile

## What business Amazon is in?

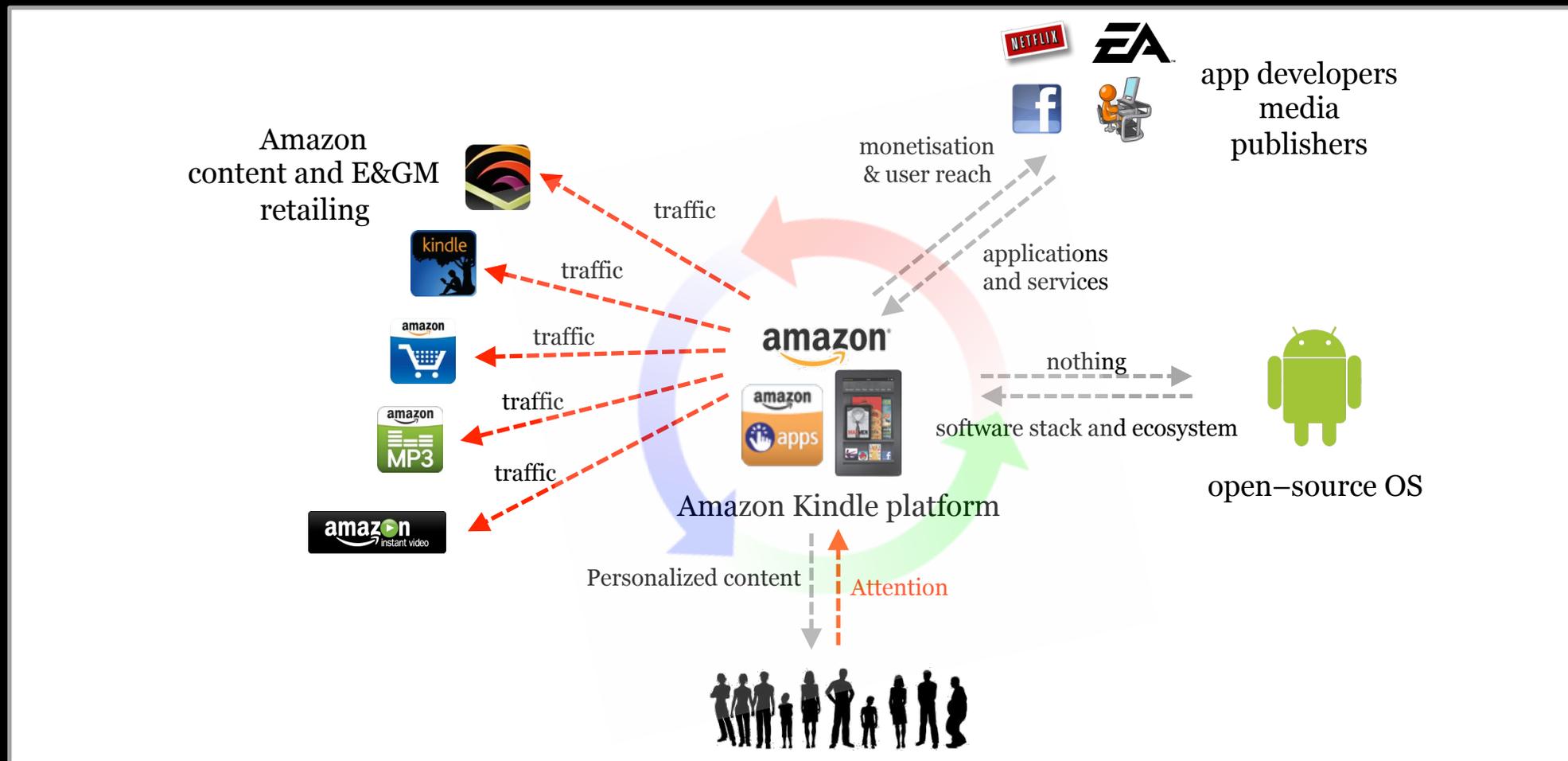
“Amazon is in the business of taking the right decisions for customers”

Amazon VP of Design, Brian Kralyevich at SXSW

# Amazon expertise - Convert traffic into sales



# The mechanics of Amazon Kindle ecosystem



# GPU capabilities are key to performance of smartphones and tablets

## Games

33% of downloads and 66% of revenues on iOS



immersive and sticky experiences  
to drive up loyalty and ASPs

## Photo sharing



NVIDIA computational  
photography architecture



Thanks for listening!

want more?

[michael@visionmobile.com](mailto:michael@visionmobile.com)

Michael Vakulenko | Strategy Director | +44 2033 844166