



APP ANNIE

**STATE
OF
MOBILE
2021**

Webinar



EXECUTIVE SUMMARY

2020 Mobile Landscape at a Glance

New App Downloads

218B

+7%

YoY Growth

*iOS, Google Play, Third-party
Android in China*

App Store Spend

\$143B

+20%

YoY Growth

*iOS, Google Play, Third-party
Android in China*

Daily Time Spent Per User

4.2 Hrs

+20%

YoY Growth

Android Phones

Mobile Ad Spend

\$240B

+26%

YoY Growth

Venture Capital to Mobile Tech

\$73B

+27%

YoY Growth

Source: Curnchbase

STATE OF MOBILE 2021

A P P A N N I E



Agenda

- Macro Mobile Trends
- Gaming
- Finance
- Social Networking
- Video Streaming
- Retail
- Food & Drink
- Business
- Marketing & Advertising
- Q&A



The Mobile Performance Standard





Disclaimer

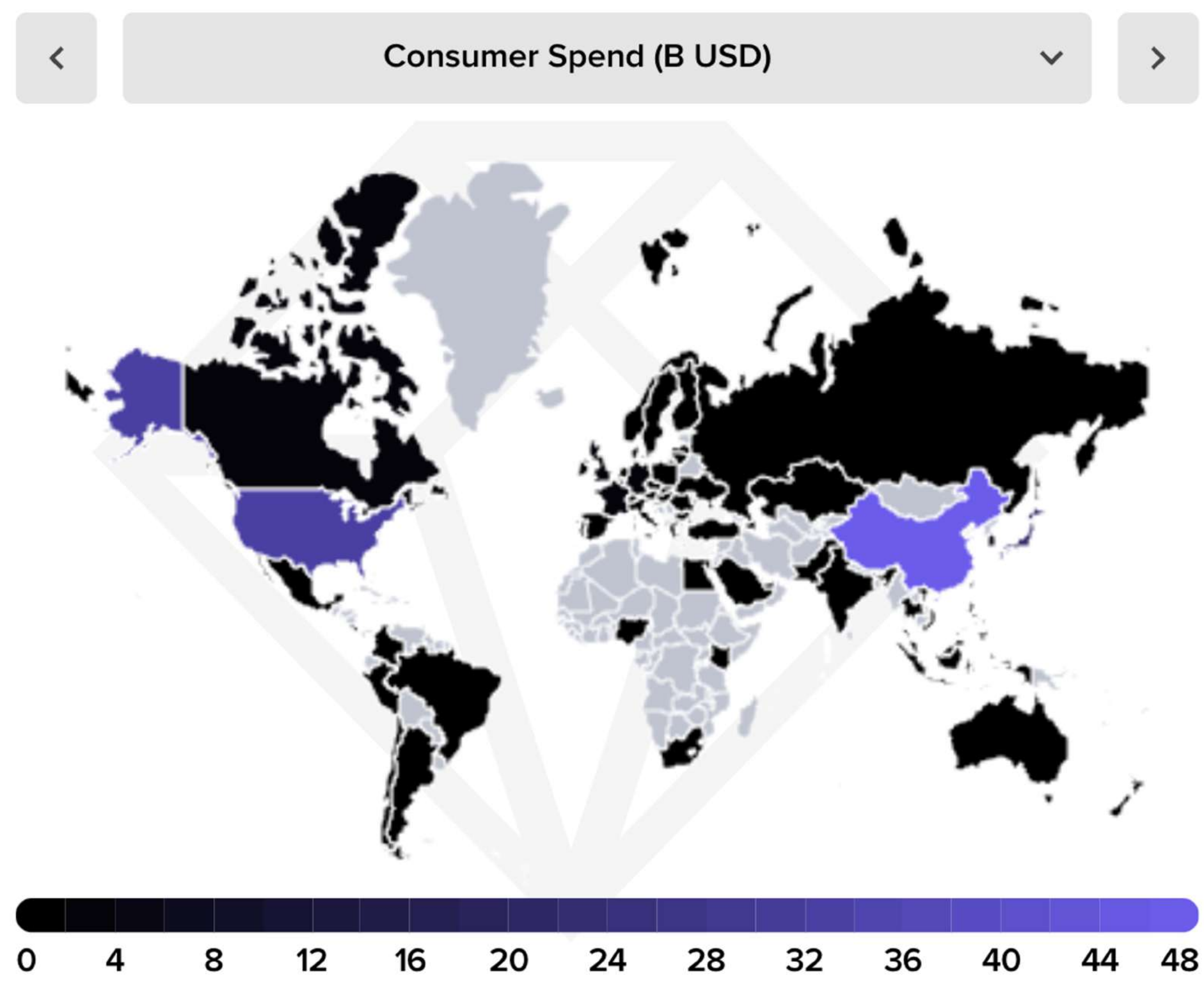
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Macro Mobile Trends





Top Markets by App Store Downloads, Consumer Spend & Hours Spent in 2020



Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS, Google Play, Third-Party Android in China combined; Spend is gross — inclusive of any percent taken by the app stores; Hours Spent is on Android phones

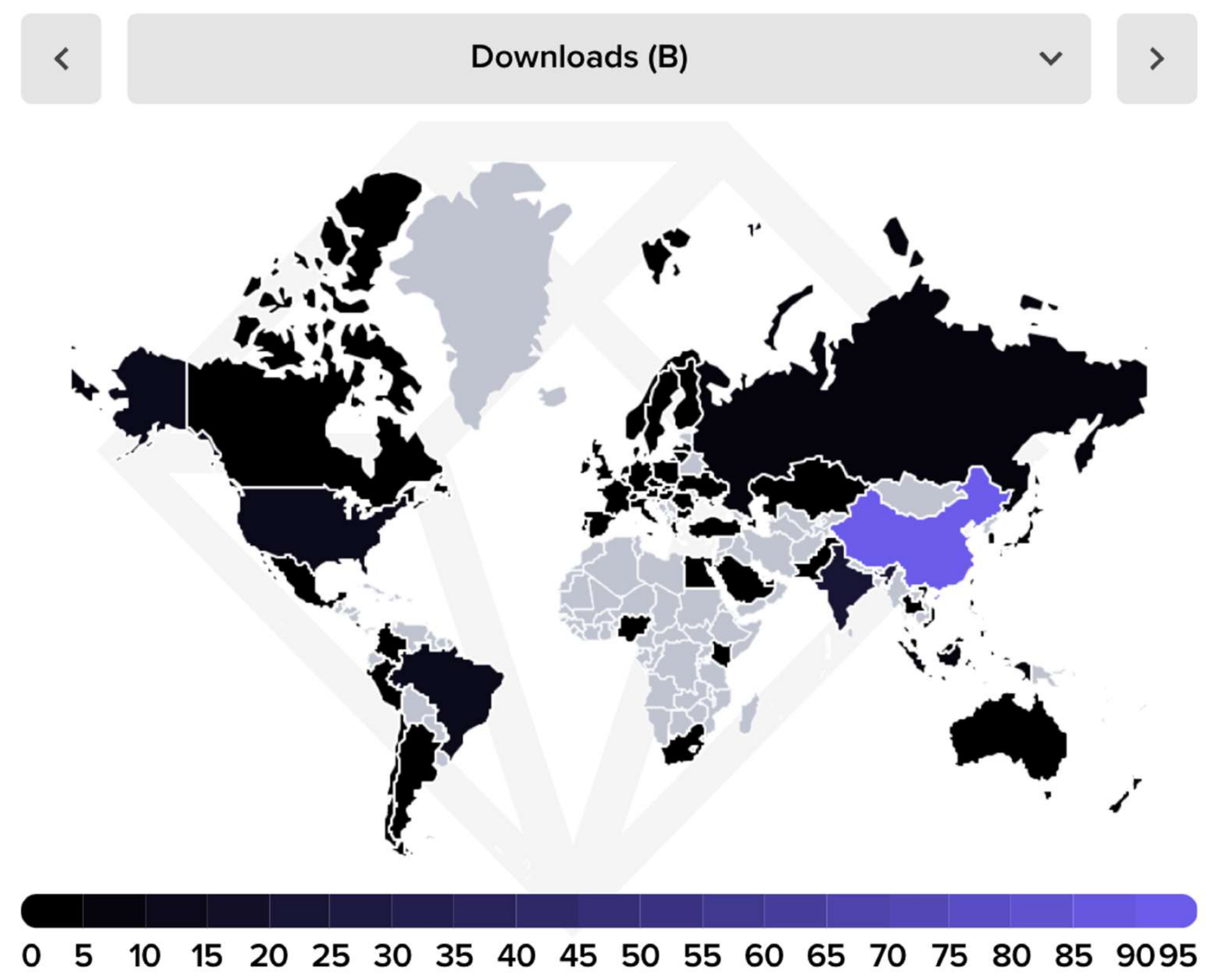
\$143B Consumer Spend in 2020, Up 20% YoY

Spend Hit New Record High

Are you ready to seize the next big opportunity?
Uncover key market drivers, shifts in consumer demand, spend and engagement, and markets primed for growth.



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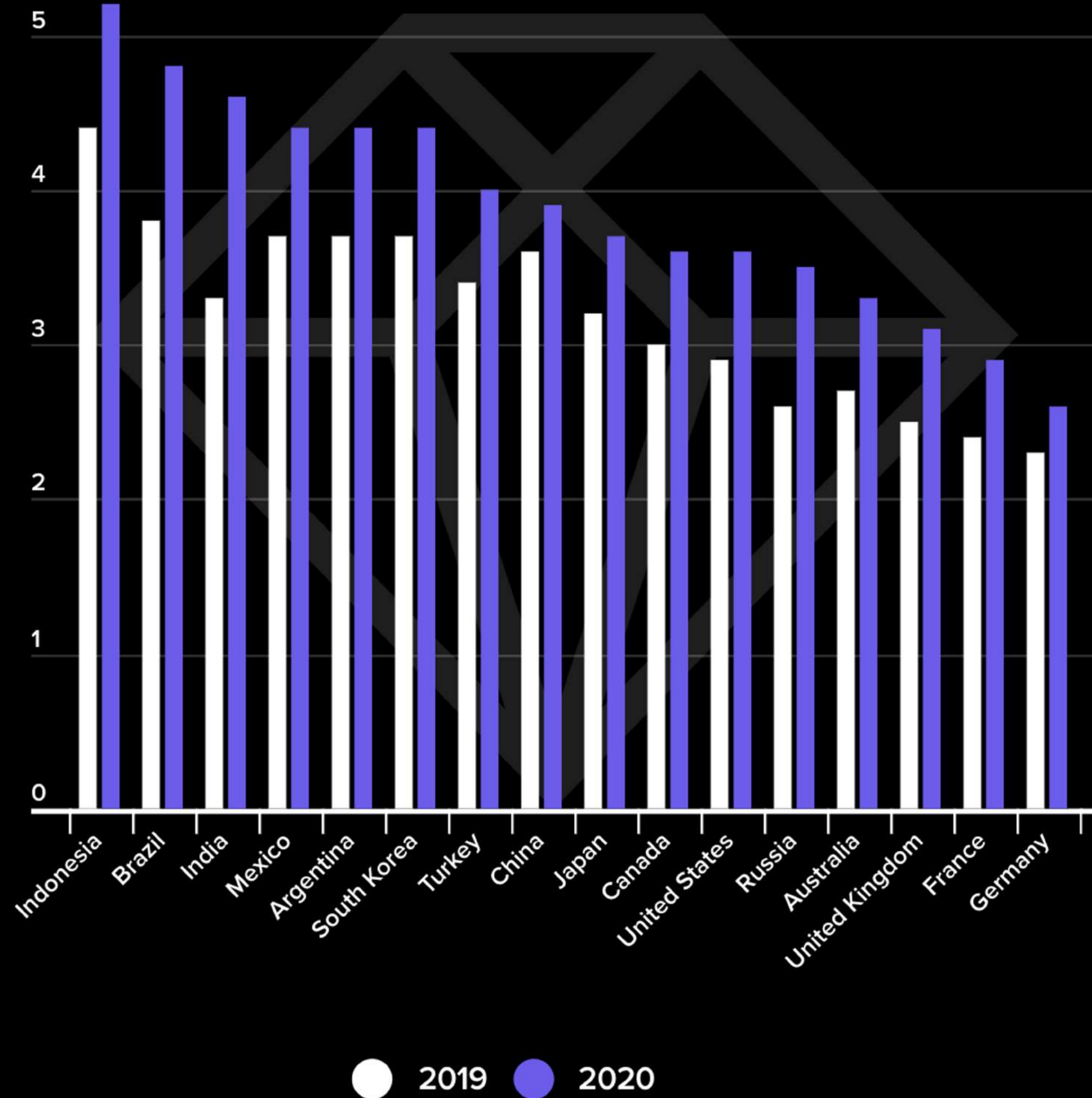
218B Downloads in 2020, Up 7% YoY

Increased Demand for New Apps and Games

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Uncover key market drivers, shifts in consumer demand, spend and engagement, and markets primed for growth.



Average Hours Spent on Mobile Per Day Per User



Source: App Annie Intelligence
Note: Android phones

Mobile Time Spent Surpassed Live TV

Americans Spent 8% More Time on Mobile Than Watching Live TV Each Day

Know where to make strategic decisions: advertising spend, corporate prioritization and resource allocation follow the eyeballs — and they are on mobile. Mobile market estimates highlight growth sectors to inform strategic roadmap and investment priorities.

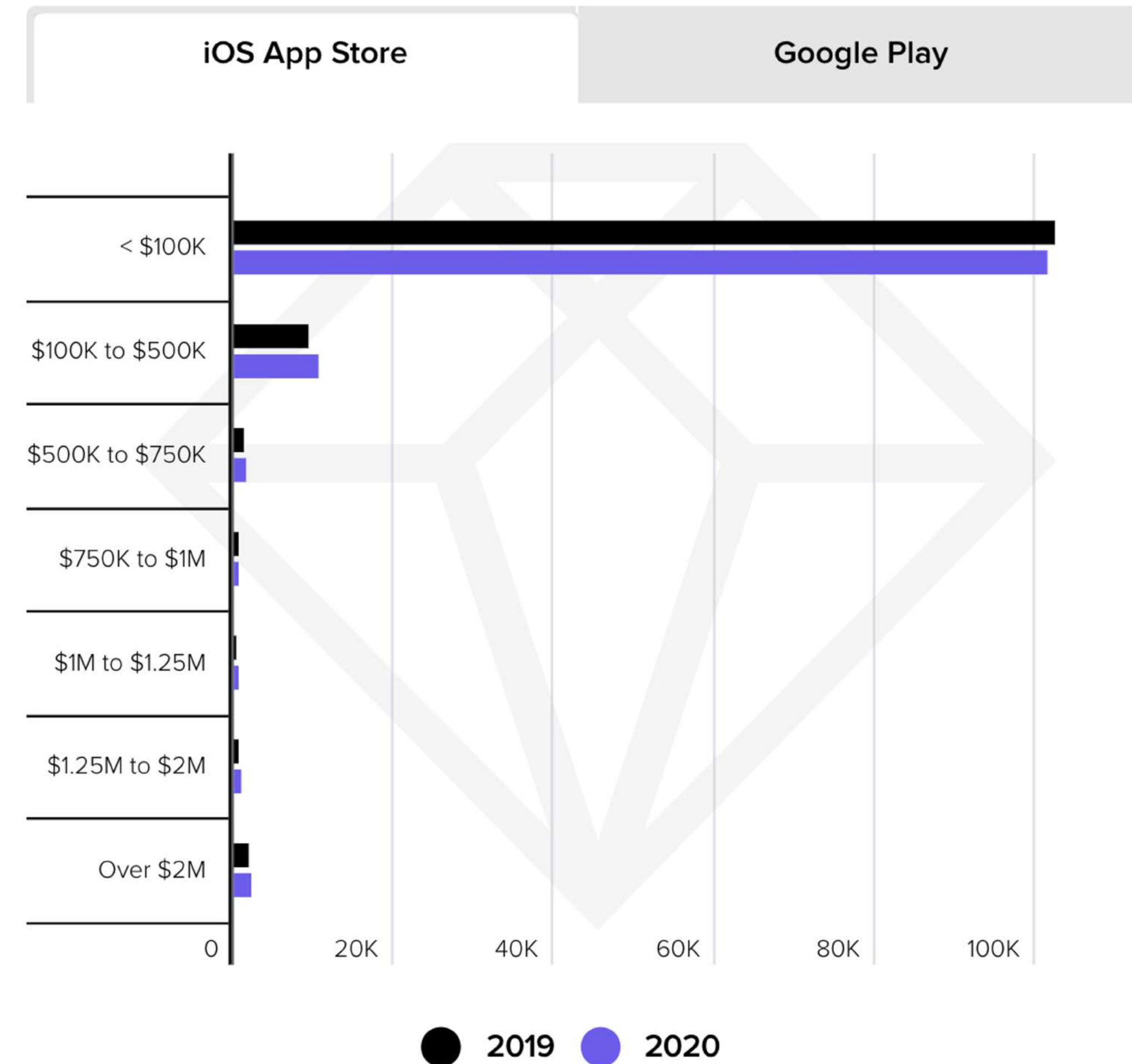


Monetization: 25% More Publishers Earned Over \$2M Per Annum on Either Store

Majority < \$1M Per Store; Would
Benefit from Apple's App Store Small
Business Program

Analyze revenue trends across stores, categories and
countries to maximize your LTV and revenue potential.

Distribution of Mobile App Publishers
by Annual Global App Store Consumer Spend



Source: App Annie Intelligence Note: China is iOS only; Among top publishers analyzed; Publishers can roll up into companies and parent companies; Analysis is done on the publisher-level among apps that monetize through the app stores; Not all publishers across both app stores are represented; Starting value of ranges is \$100,001, \$500,001, \$750,001, \$1,000,001, \$1,250,001, \$2,000,001 respectively.

Gaming

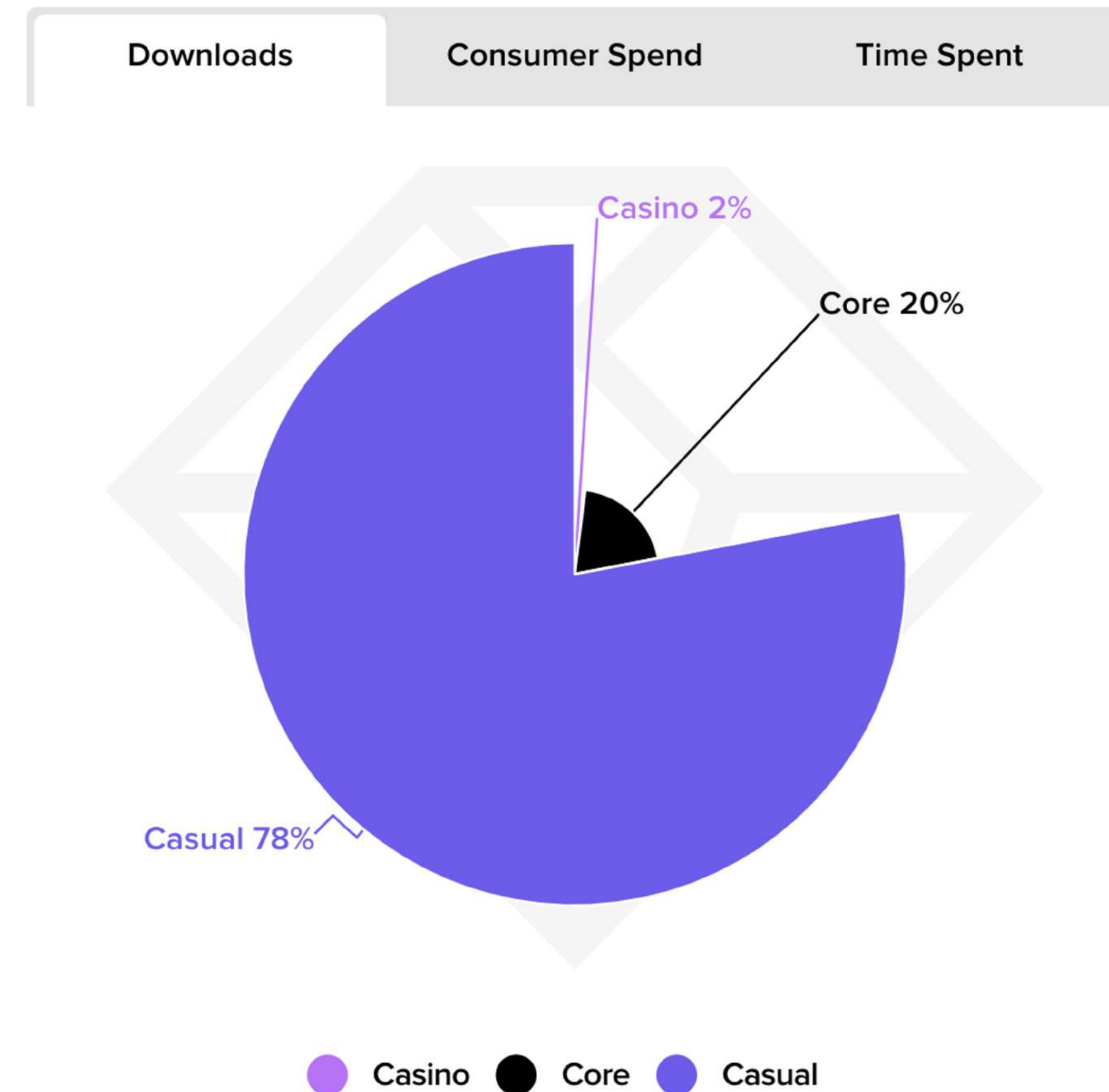


Casual Gamers Dominate Global Downloads

Easy-to-Use Games like Among Us, ROBLOX See Widespread Demand

Uncover detailed market opportunities, build products catered to your subgenre, and analyze granular gamer preferences with Game IQ the industry standard for game classification.

Global Mobile Gaming Breakdown 2020



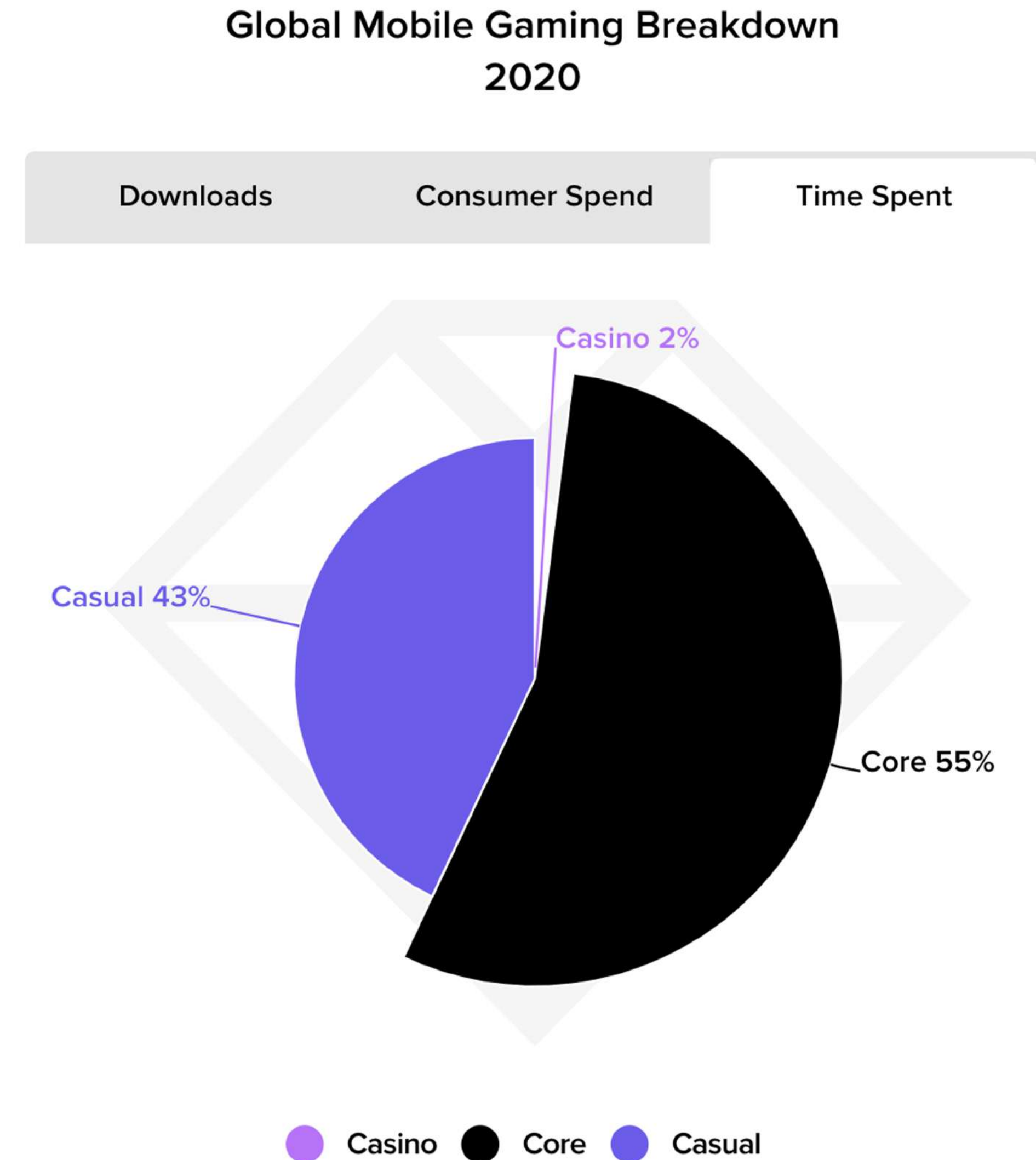
Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS and Google Play combined (iOS only in China); Spend is gross — inclusive of any percent taken by the app stores; Time Spent is on Android phones



Core Gamers Chose Mobile Console at Home

Core Gamers Generate 66% of Spend, 55% of Time Spent on Mobile Games

Uncover detailed market opportunities, build products catered to your subgenre, and analyze granular gamer preferences with Game IQ the industry standard for game classification.



Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS and Google Play combined (iOS only in China); Spend is gross — inclusive of any percent taken by the app stores; Time Spent is on Android phones

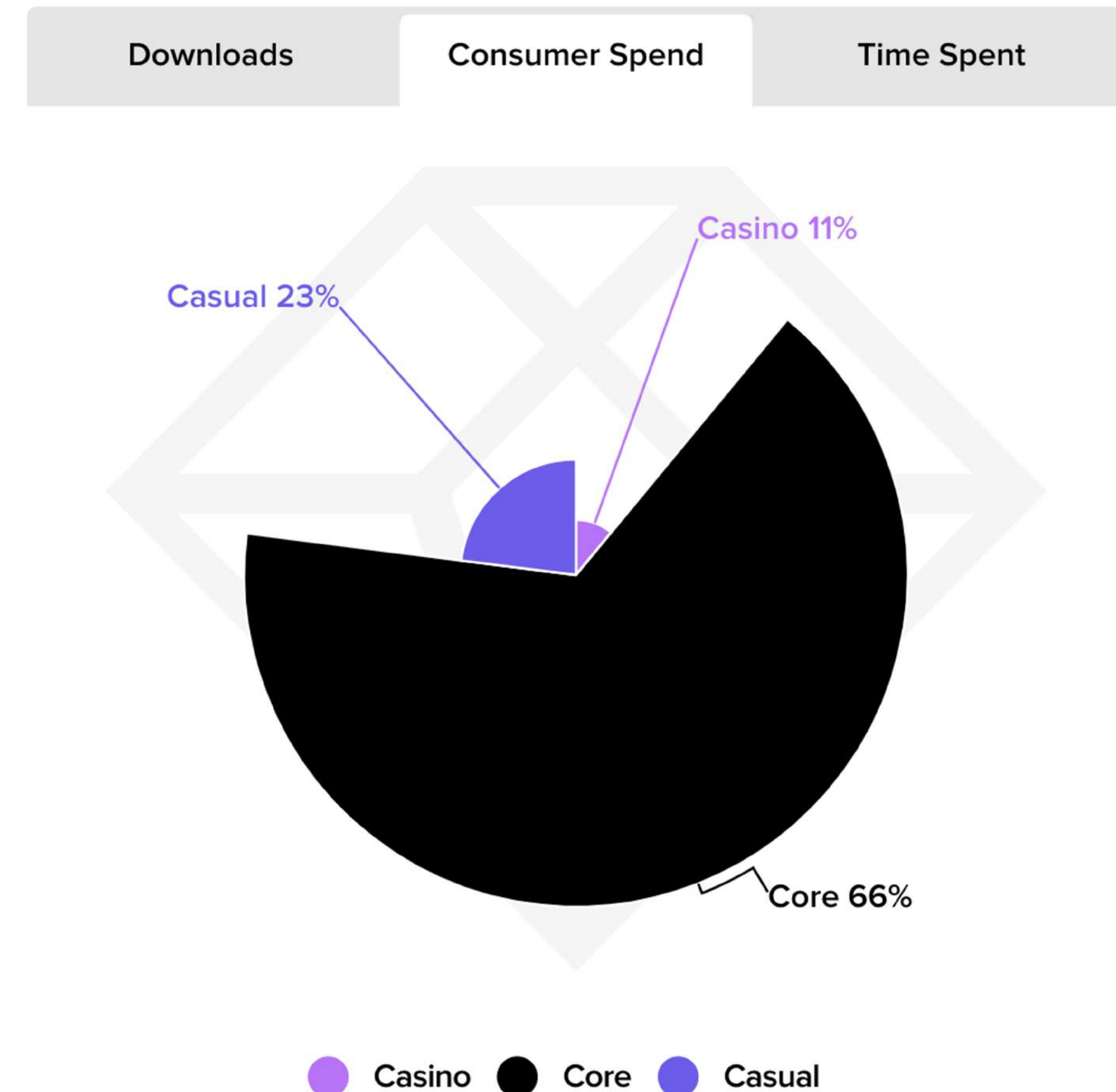


Mobile Gaming to Surpass \$120B in 2021

1.5x of the Market Compared to All Other Gaming Combined

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Global Mobile Gaming Breakdown 2020



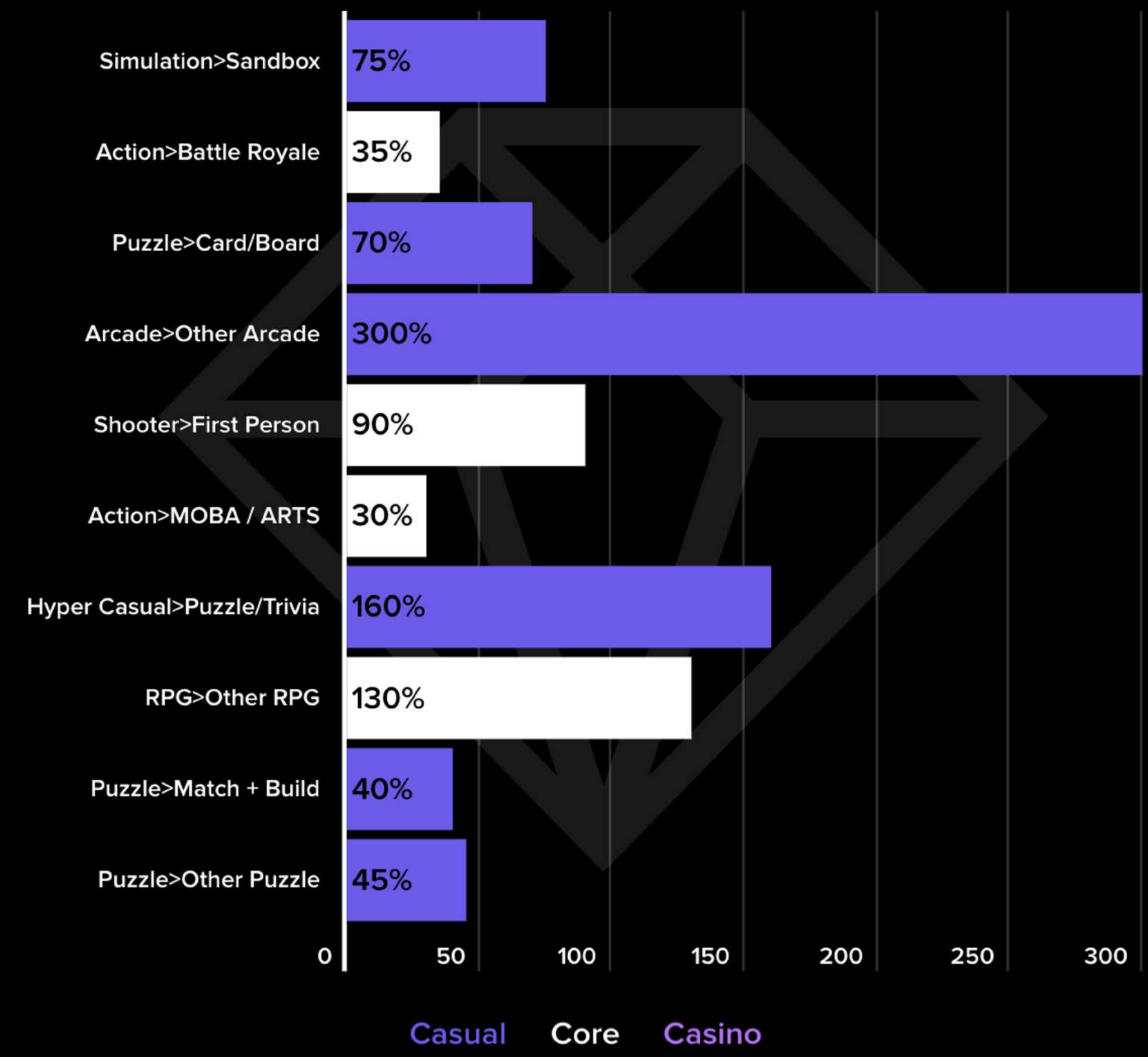
Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS and Google Play combined (iOS only in China); Spend is gross — inclusive of any percent taken by the app stores; Time Spent is on Android phones





Gaming

Year-Over-Year Growth in Global Hours Spent
Ordered by Year-Over-Year Market Share Growth
in 2020



Source: App Annie Intelligence Note: Android phones, Among top 10 subgenres by year-over-year growth in market share of time spent

Sandbox, Arcade & Card / Board Casual Games Gained Market Share

Mobile Gaming Moves Mainstream

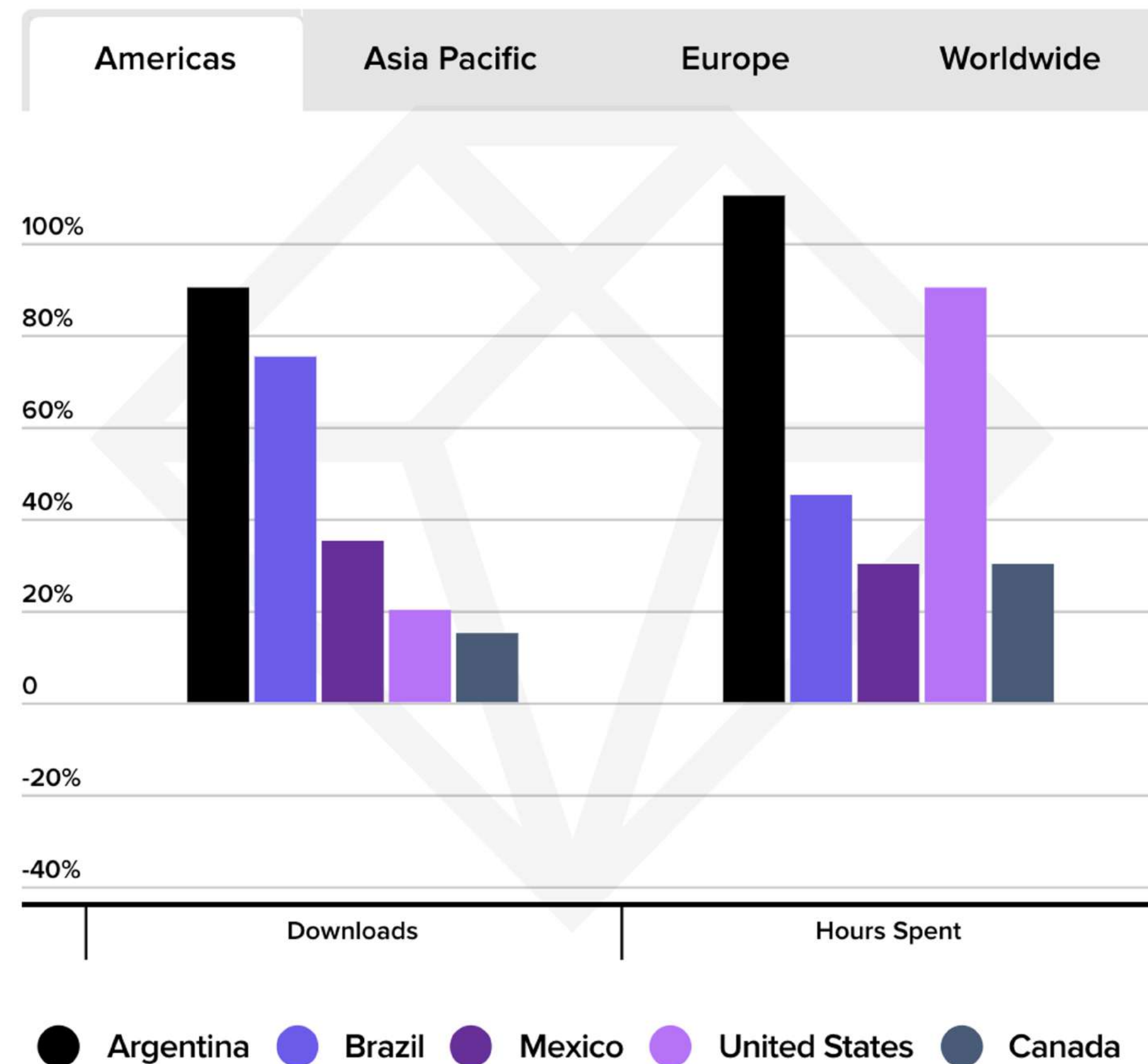
The mobile game market is moving fast. In order take advantage of trends, timely and in-depth estimates and analysis are required. Let Game IQ take you to the next level with detailed game classification.

Finance





Year-Over-Year Growth in Downloads & Hours Spent in Finance Apps in 2020



Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS, Google Play, China is iOS only; Hours Spent is on Android phones

Mobile Fuels 45% More Financial Engagement

Mobile Is the Channel for Influencing Financial Decisions

Understand which features are cultivating stickiness with users and preferred over desktop or in-person interfaces. Mobile is the common thread in financial decision-making: from research to consideration, evaluation & purchase or investment.

Social Networking



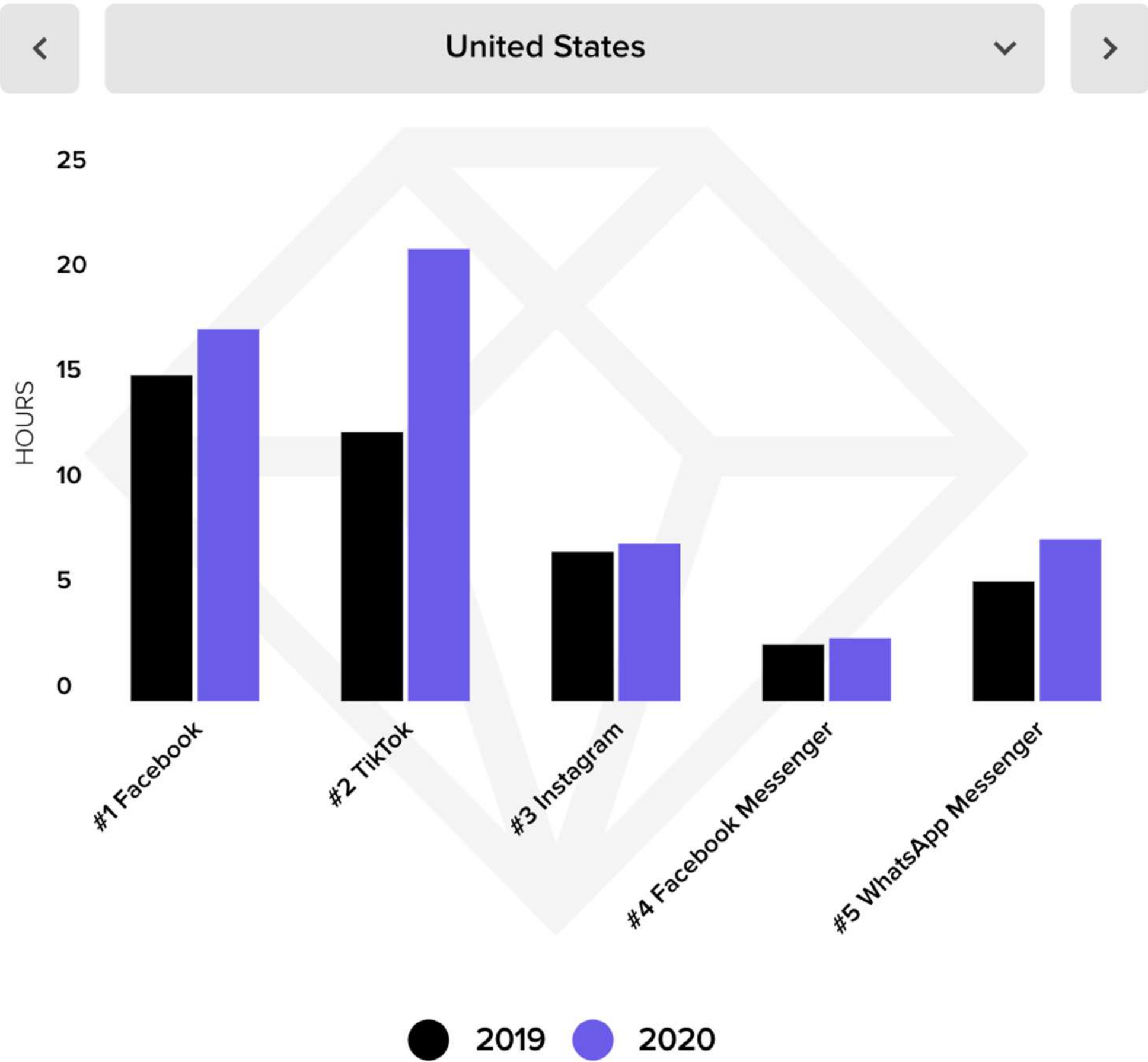


TikTok Outpaces Top Social Apps in Hours Per User

Up to 325% Year-Over-Year Growth

Monitor consumer behavior shifts: TikTok is commanding significant per-user engagement. Mobile market estimates inform if this is cutting into your market share, or additive overall and how that shapes your next steps.

Average Monthly Time Spent Per User Among Top Social Networking Apps by Hours Spent in 2020



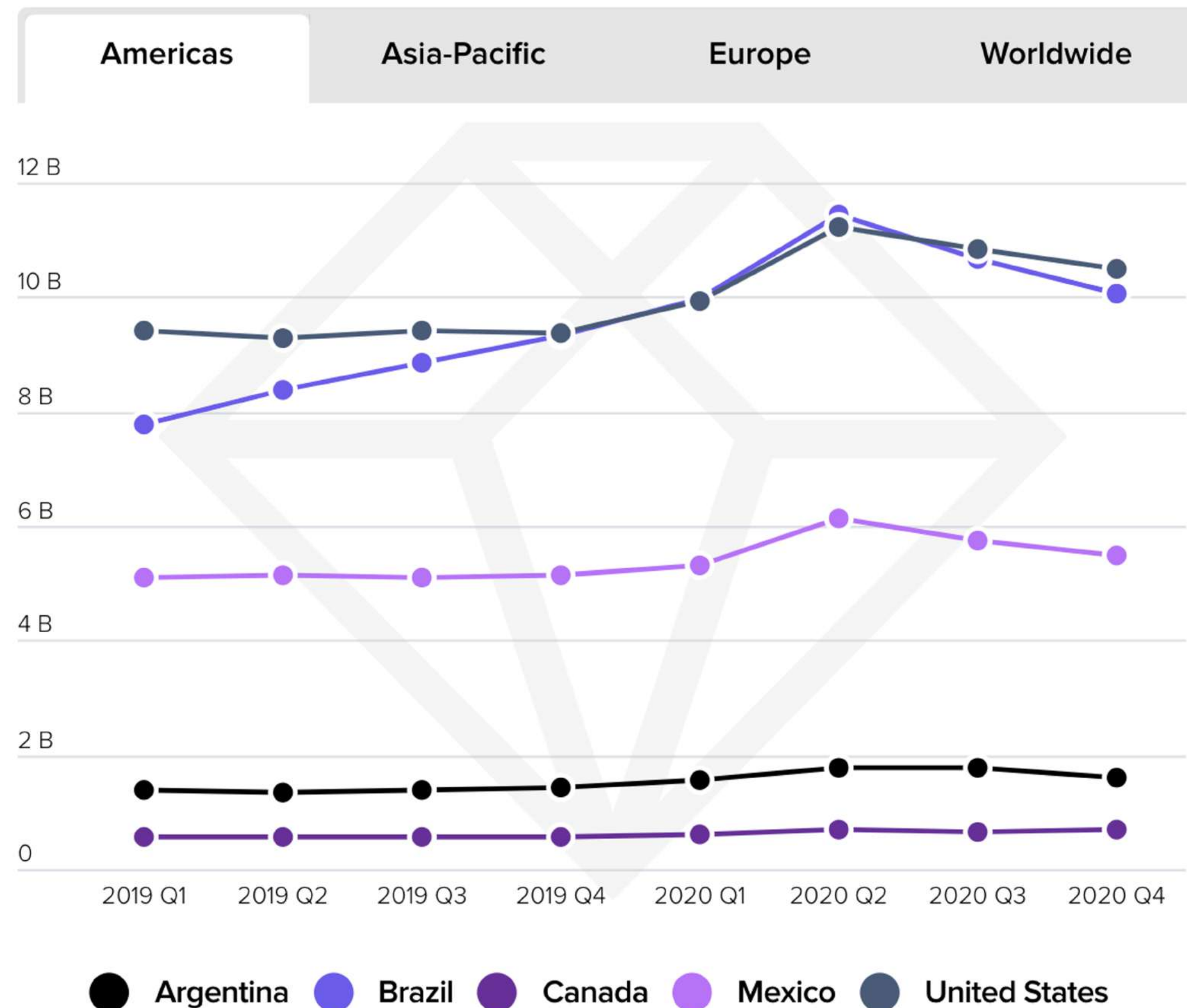
Source: App Annie Intelligence
Note: Android phones; Top apps ranked by overall Time Spent

Video Streaming





Quarterly Hours Spent in Video Streaming Apps



Source: App Annie Intelligence

Note: Android phones; Video Streaming apps comprised
of Entertainment and Video Players & Editors

40% More Hours Streamed on Mobile in 2020

Binging From Anywhere —
Consumers Choose Mobile Over TV

Maximize your output: Know where to focus your ads, craft your SDK and ad partnerships and analyze features in high demand to inform your strategy.

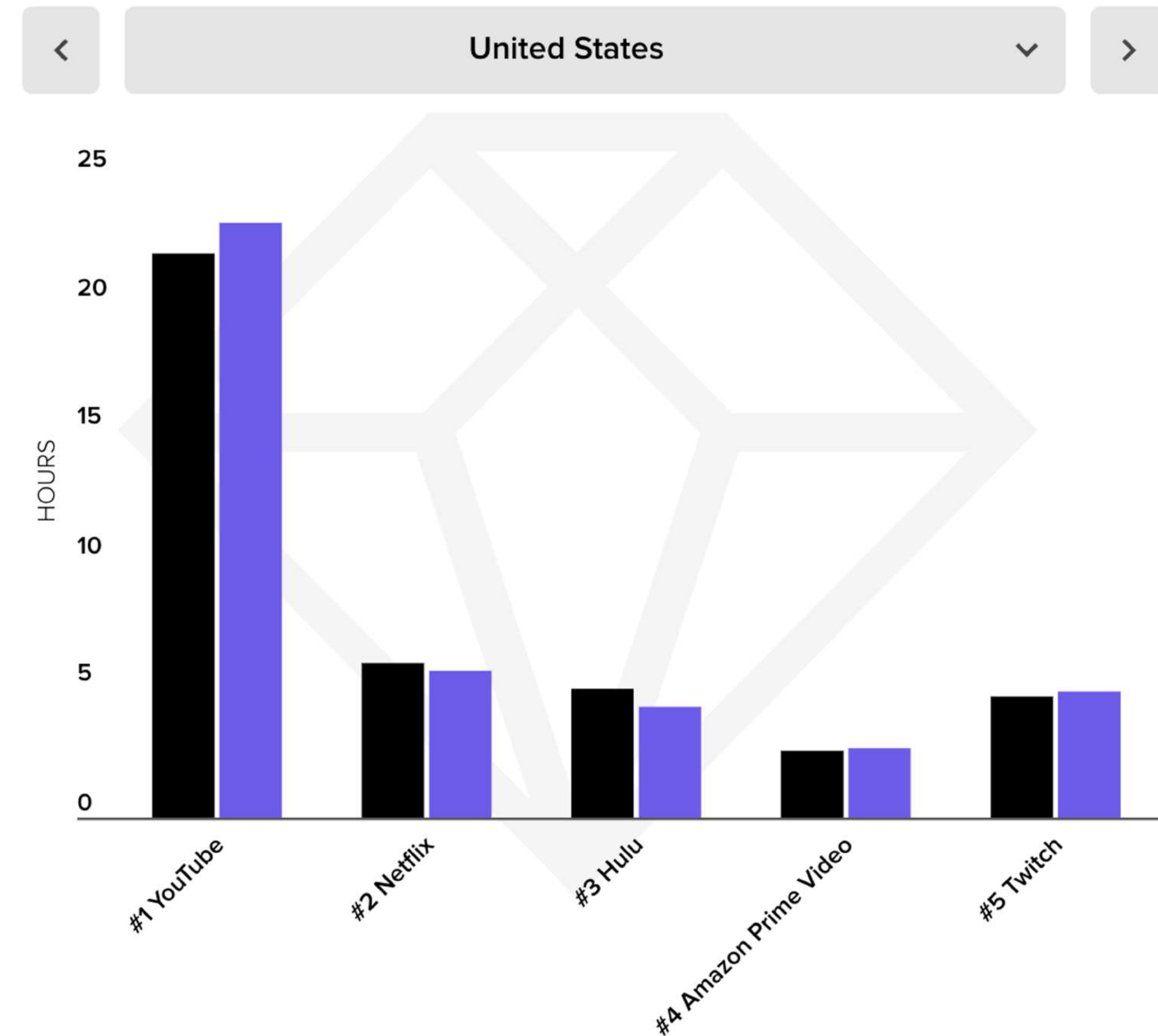


YouTube Sees Up To 6x Time Spent Per User vs. Next Closest App, Up to 38 Hours a Month

Equivalent to One Week's Worth of Full-Time Work Spent Streaming

Benchmark your success and progress in highly competitive markets like video streaming. Lower than average time spent per user? Consider your re-engagement mechanisms, recommendation engine and streaming features like joint-viewing. Evaluate mobile market estimates to benchmark progress.

Average Monthly Time Spent Per User Among Top Video Streaming Apps by Hours Spent



Source: App Annie Intelligence

Note: Android phones; Top apps ranked by overall Time Spent; Excluding News & Sports streaming apps

Retail



M-Commerce Boom Changes Shopping Behavior

Biggest Mobile Shopping Year Yet —

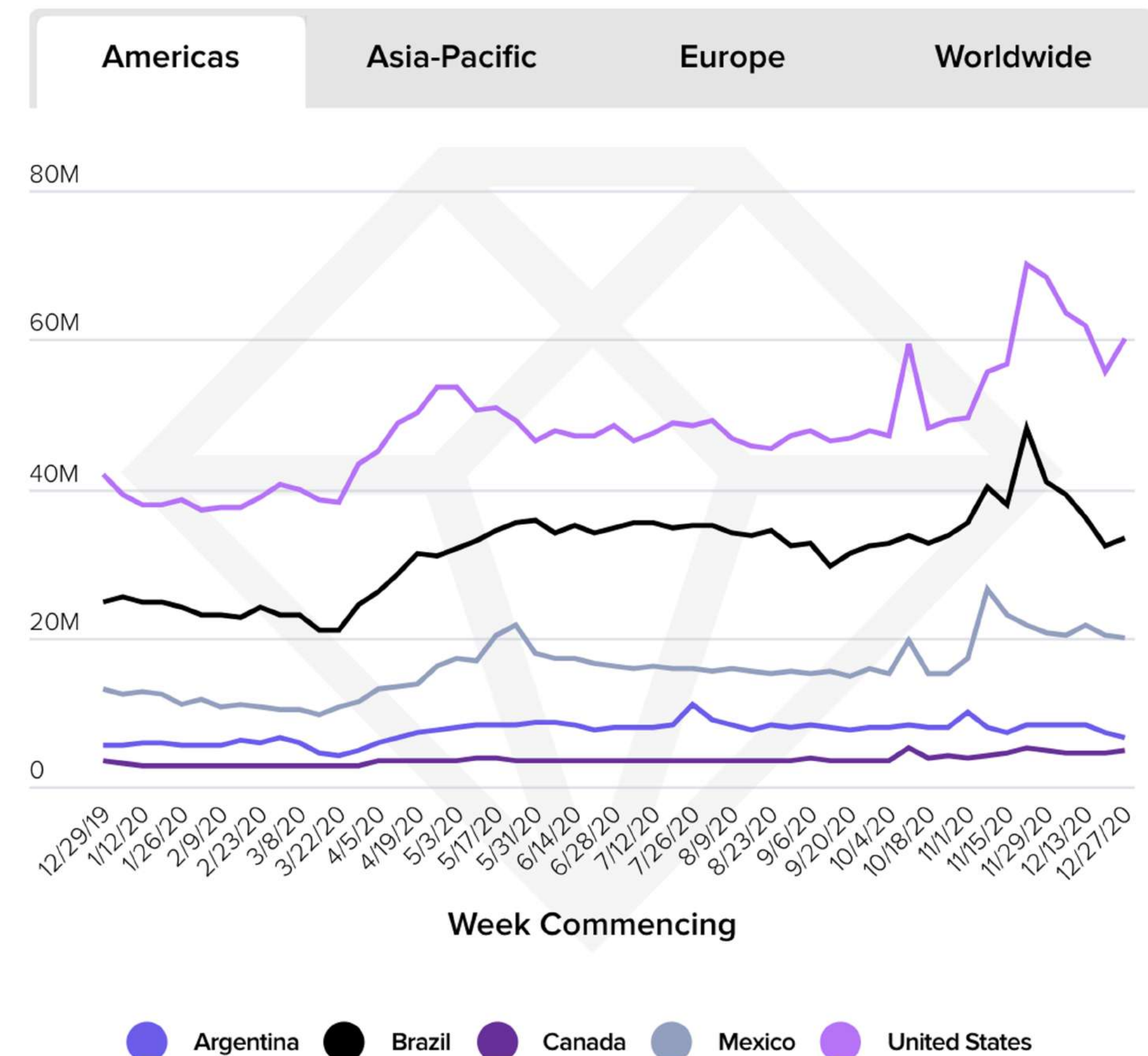
\$115B During 11.11 Shopping Festival,

\$53.2B on mobile Nov 1 - Dec 9 in the US (+55% YoY)

+30% YoY Time Spent Globally

Capitalize on a rapidly growing market — use data to segment, strategize and identify opportunities to drive top-line retail growth.

Weekly Hours Spent
in Shopping Apps in 2020

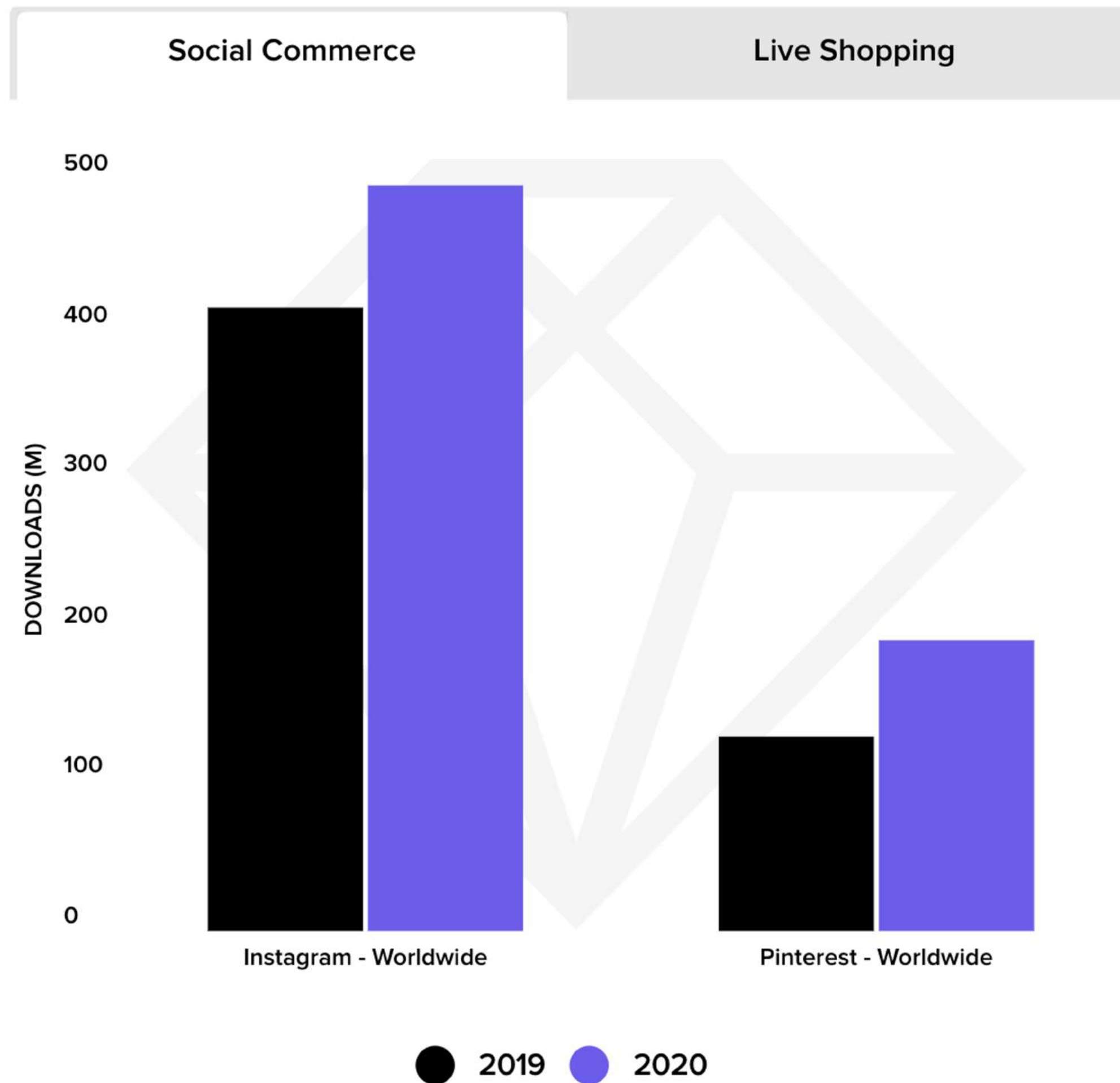


Source: App Annie Intelligence

Note: Android phones



Downloads of Select Social Commerce & Live Shopping Apps in Select Markets



Source: App Annie Intelligence

Note: iOS and Google Play combined; China is iOS only

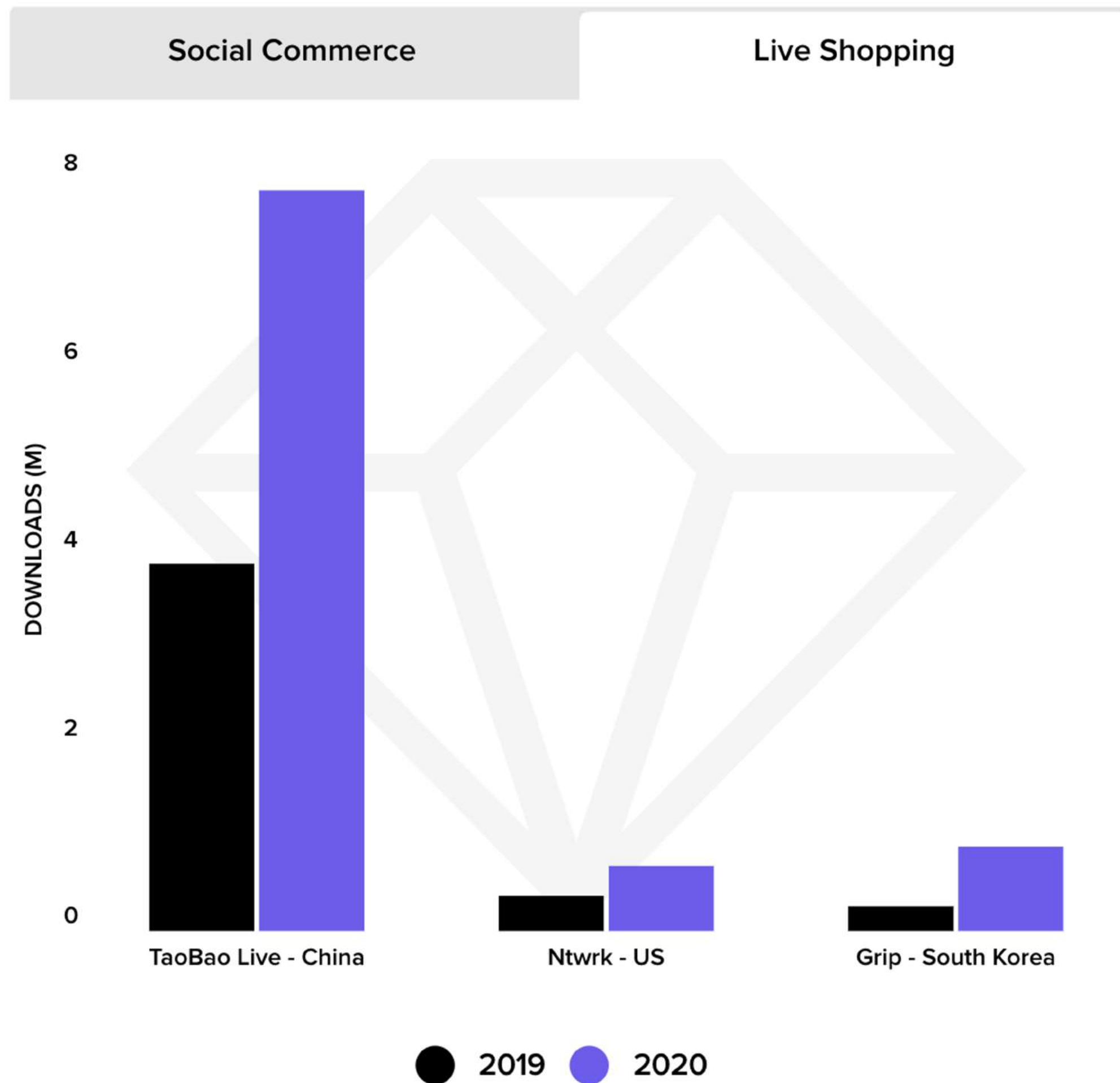
Alternative Commerce: Social & Live Shopping, a \$2 Trillion Opportunity

Mobile-First Shopping of 2021 & Beyond

Monitor early indicators of high-growth segments in the mobile market by country and region to plan in advance for emerging and disruptive trends.



Downloads of Select Social Commerce & Live Shopping Apps in Select Markets



Source: App Annie Intelligence

Note: iOS and Google Play combined; China is iOS only

Alternative Commerce: Social & Live Shopping, a \$2 Trillion Opportunity

Mobile-First Shopping of 2021 & Beyond

Monitor early indicators of high-growth segments in the mobile market by country and region to plan in advance for emerging and disruptive trends.

Food & Drink





Weekly Sessions Spent in Food & Drink Apps in 2020



Source: App Annie Intelligence
Note: Android phones

Mobile Orders of Fast Food & Food Delivery Surge

Country Sessions Grew Up to 105% Year-Over-Year

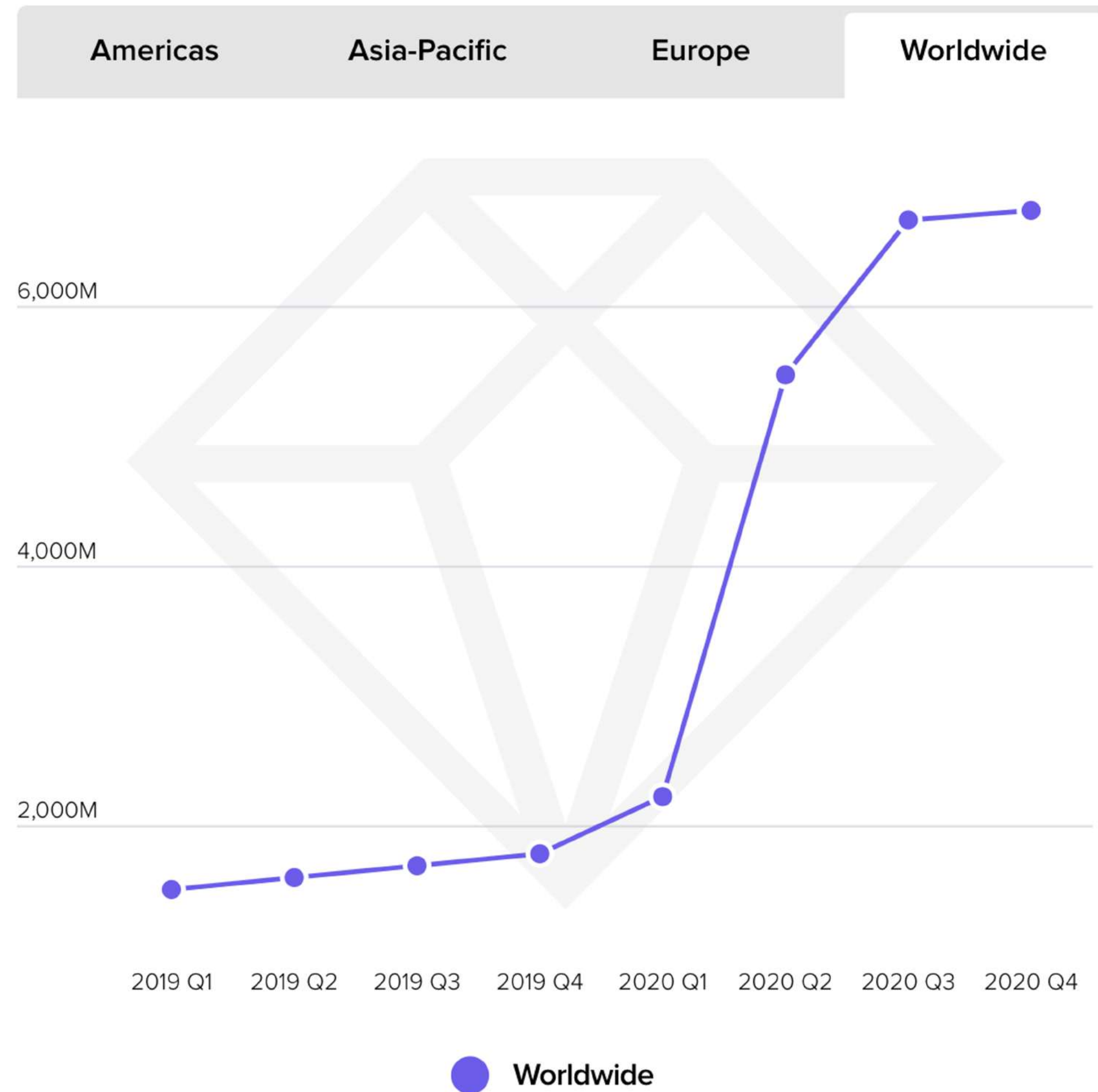
Analyze app features and their performance metrics. Contactless delivery, contactless payments, a desire for choice and variety help fuel demand for Food & Drink apps.

Business





Quarterly Hours Spent in Business Apps



Source: App Annie Intelligence

Note: Android phones; Worldwide outside of China

Time Spent in Business Apps Grew 275% YoY in Q4 2020

ZOOM, Google Meet Soar

Increased video conferencing during the 40-hour workweek can spill over into other consumer habits. Understand affinity across apps and industries to minimize time to action.

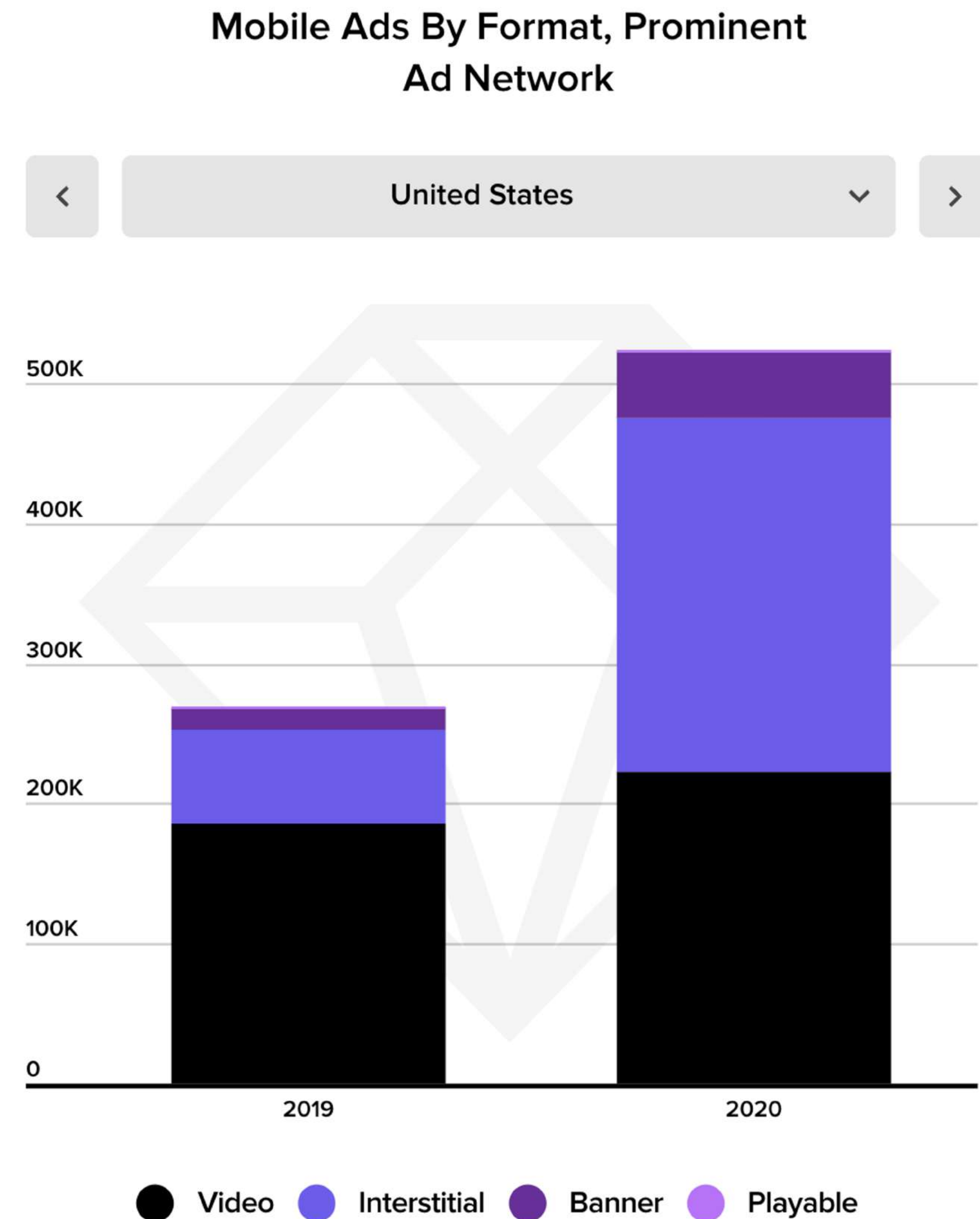
Marketing & Advertising



Mobile Ad Placements Grew 95% YoY in US

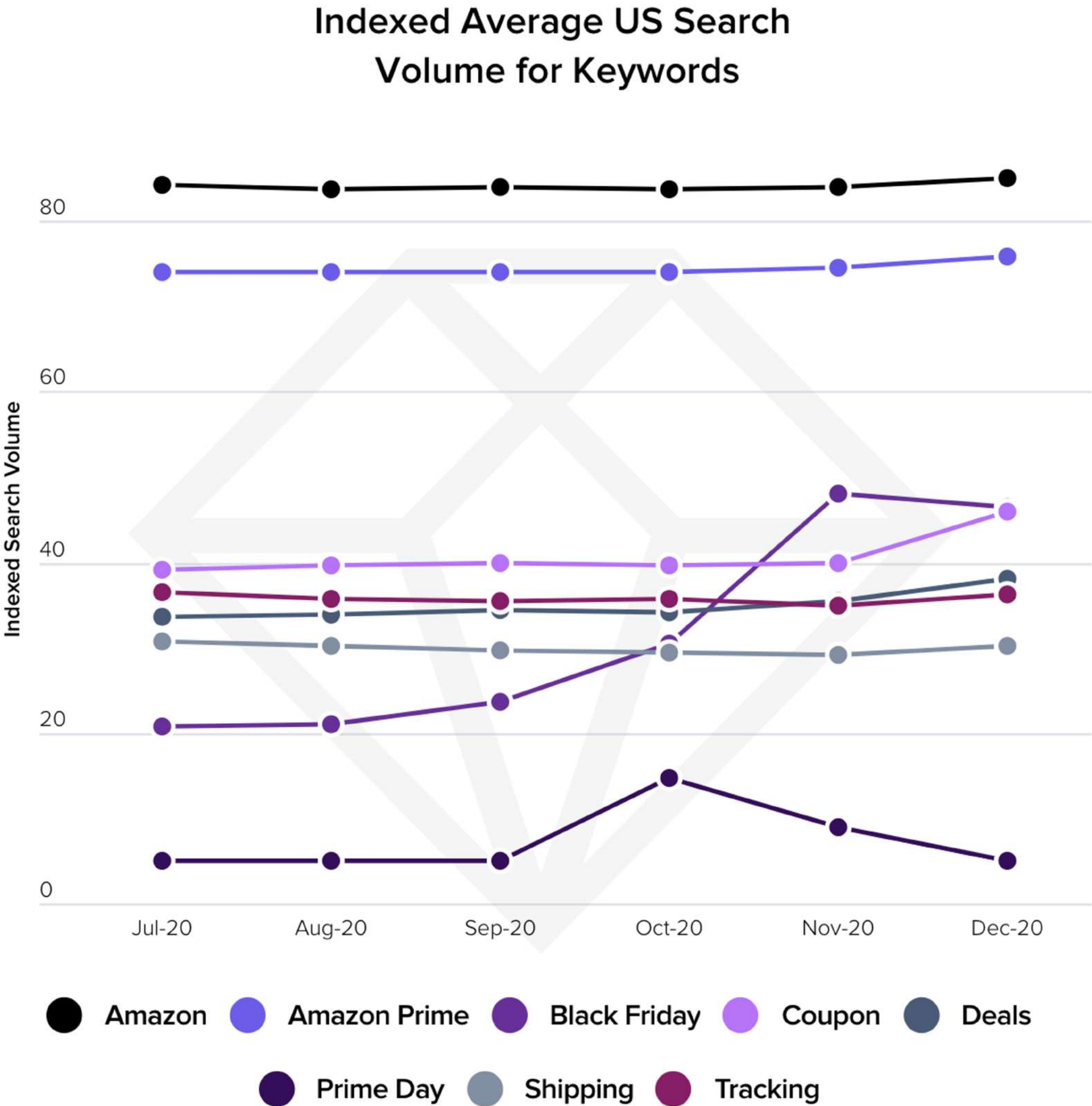
335% in Turkey, 175% Mexico, 165% France, 170% Brazil

Mobile bolstered the ad industry in 2020 — growing to \$240 billion in mobile ad spend and set to top \$290 billion in 2021. Use SDK and ad network penetration insights along with creative intelligence to explore the ad partnerships and best practices for the strongest ROI.



Source: App Annie Intelligence
Note: iPhones and Android phones





Capitalize on Organic Search Traffic With Strategic Keyword Optimization

Black Friday Interest Ramps in September

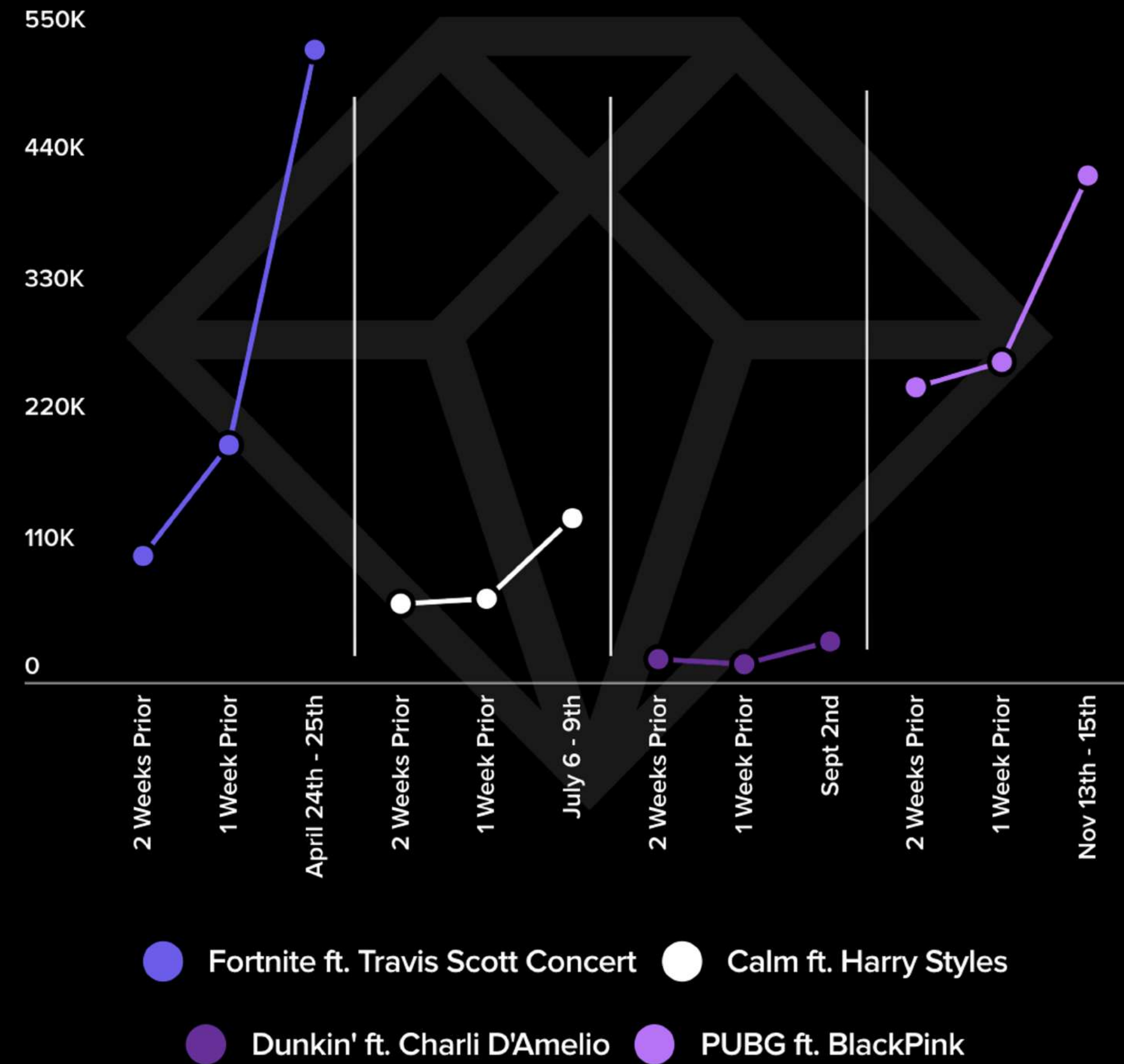
Source: App Annie Intelligence
Note: iPhones; Averaged daily search volume

Strategic Celebrity-Mobile App Collabs Spur Up to 2.7x Downloads

Mobile-Savvy UA Needed to Cut Through the Noise

Collaborations can boost your user acquisition if planned carefully, fueled by demographic, cross-app usage and engagement data, and integrated marketing resources diverted to fully support the mobile campaign.

Average Daily Global Downloads During Celebrity Collab Events in 2020

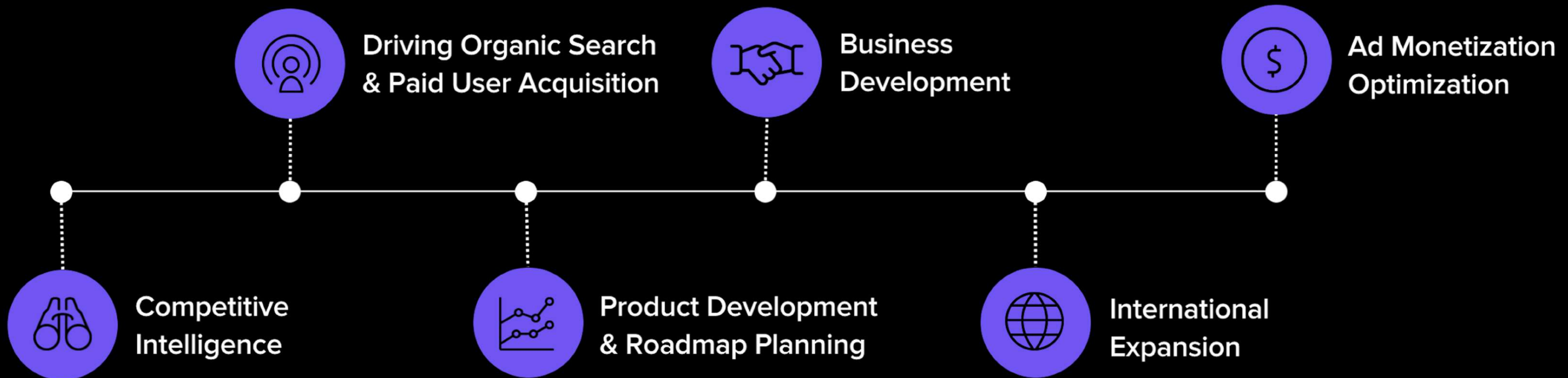


Source: App Annie Intelligence
Note: iOS and Google Play, China is iOS only



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