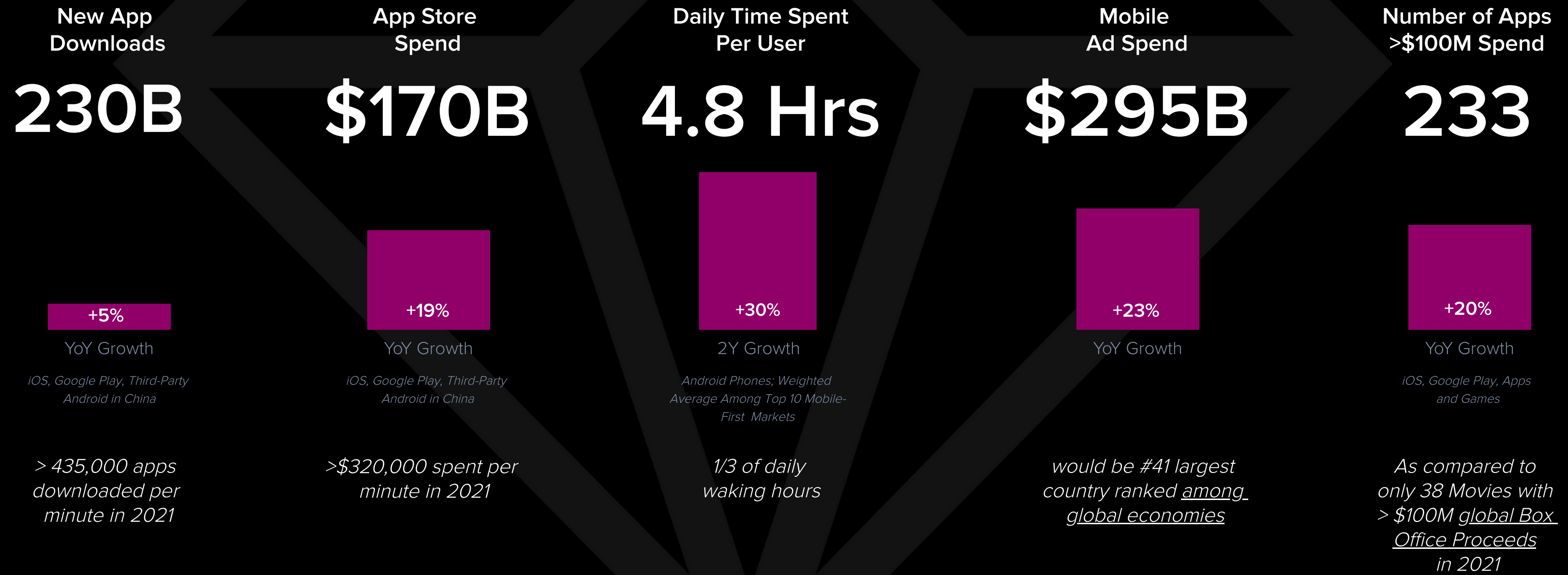


STATE OF MOBILE 2022

EXECUTIVE SUMMARY

2021 Mobile Landscape at a Glance



Contents

- [Macro Mobile Trends](#)
- [Gaming](#)
- [Finance](#)
- [Retail](#)
- [Video Streaming](#)
- [Food & Drink](#)
- [Health & Fitness](#)
- [Social](#)
- [Travel](#)
- [Dating](#)
- [Other Industries Embracing Mobile](#)
- [Top App & Games of 2021](#)

Dive deeper into the insights contained in this report by exploring directly in App Annie Intelligence. Each slide contains links to view the data in expanded markets and trended over time. For Access to App Annie Intelligence, [reach out today](#). This report is interactive. For the best user experience, please view in your web browser.

APP ANNIE

A Few of Our Amazing Customers

VISA

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LINE



SciPlay

JAM CITY

SAMSUNG

intuit



ACTIVISION



SEGA

CVS



LIONSGATE



Panasonic



ROVIO

Alibaba



Voodoo



Macro Mobile Trends

Our partnership with App Annie has helped us better navigate the gaming market, providing us insight and assistance in the decision-making process. Our favorite has to be Game IQ's pioneering capability to present a clearer picture of our clientele and allow us to create a tailor-made experience.

Matt Liu
Global Publishing & Marketing Vice General Manager
NetEase Games



Mobile-First Markets Spend 1/3 of Waking Hours on Mobile

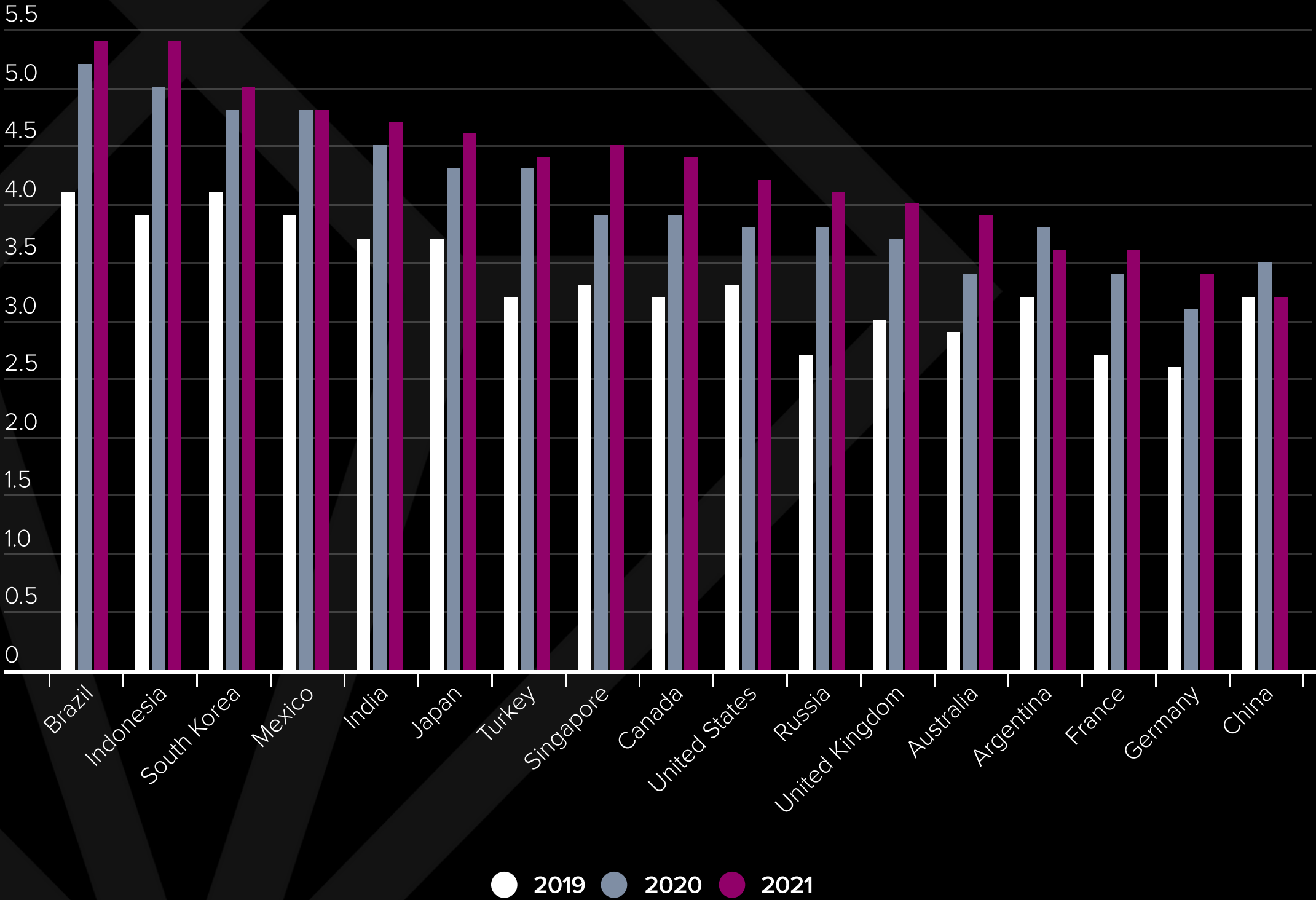
Across the top 10 markets analyzed, the weighted average surpassed 4 hours 48 minutes in 2021 — up 30% from 2019.

Users in Brazil, Indonesia and South Korea surpassed 5 hours per day in mobile apps in 2021.

The average American watched 3.1 hours of TV a day, whereas they spent 4.1 hours on their mobile device in 2021.

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

Average Hours Spent on Mobile Per Day Per User



Source: App Annie Intelligence
Note: Android phones

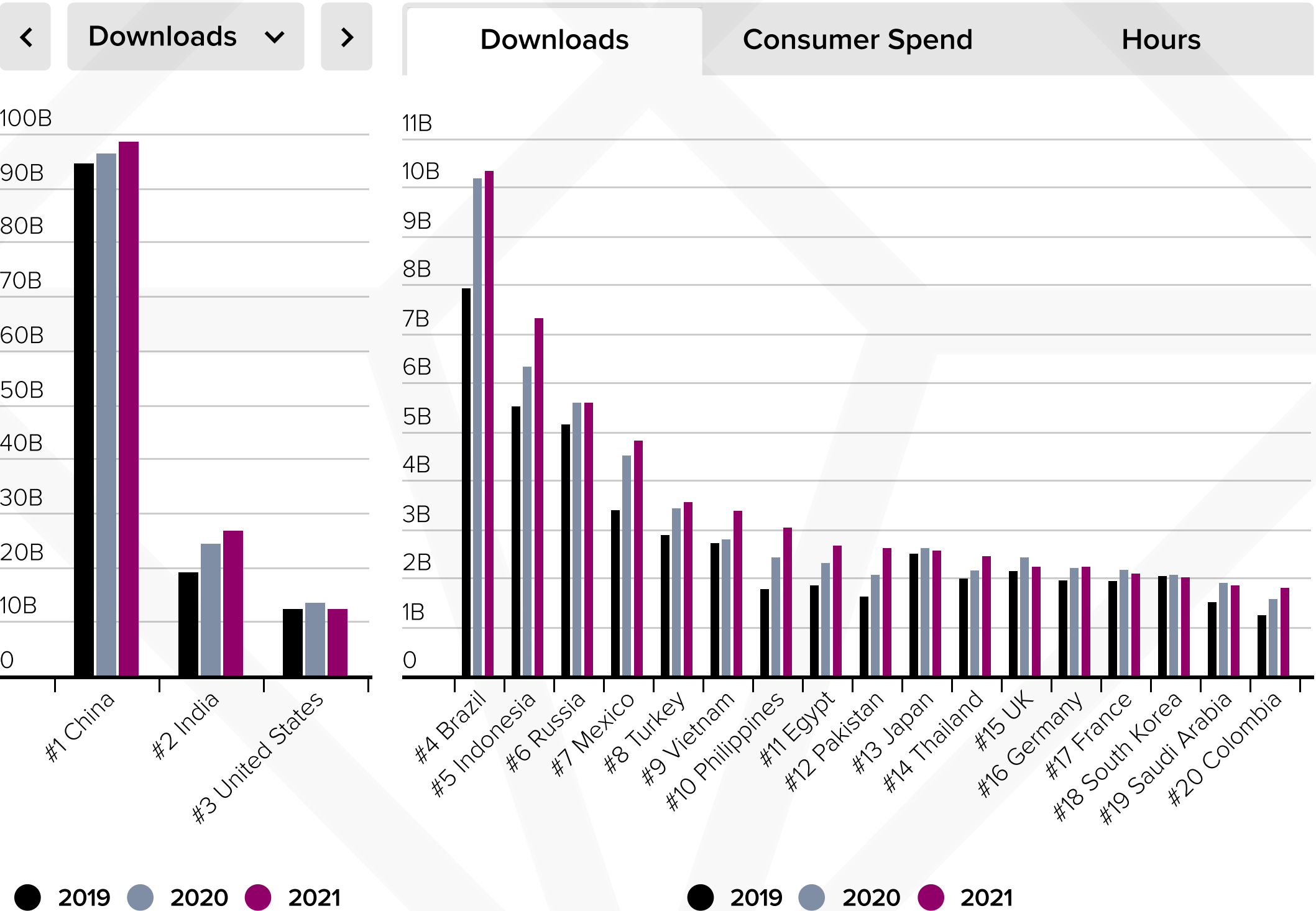
Globally 230 Billion Downloads, \$170 Billion in Consumer Spend, 3.8 Trillion Hours

The US has seen phenomenal growth in consumer spend, adding an additional \$43 billion in 2021, \$10.4 billion more than 2020, equating to 30% growth YoY as mobile gaming and in-app subscriptions go mainstream.

Emerging markets dominate for downloads growth with India seeing standout downloads. Pakistan, Peru, Philippines, Vietnam, Indonesia and Egypt were among the fastest growing markets for downloads at 25%, 25%, 25%, 20% 15% and 15% growth YoY, respectively.

Mobile adoption boomed in 2021, with growth across downloads, usage and app store consumer spend. Size the market and keep tabs on fast-growing areas of opportunity in App Annie.

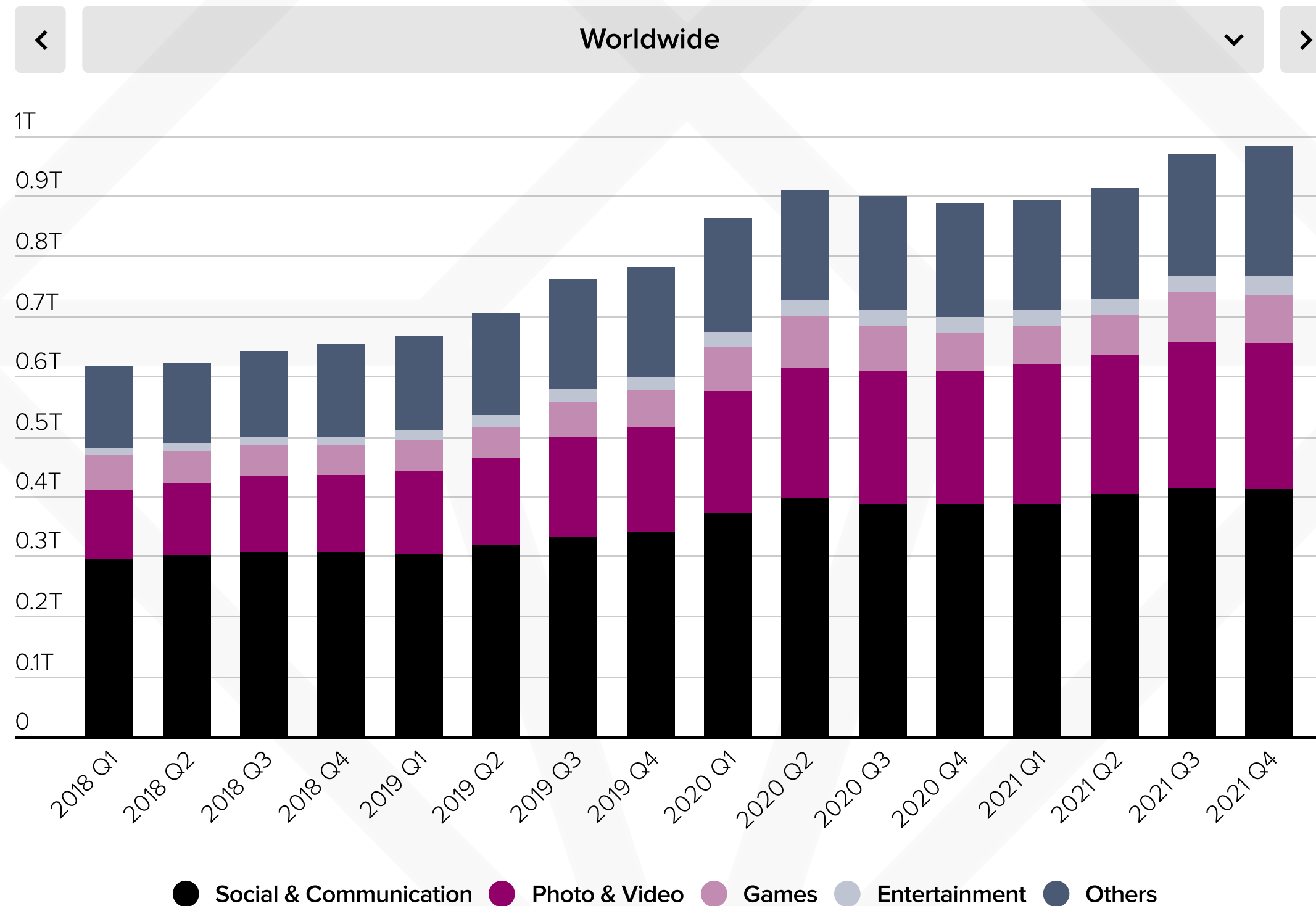
Top 20 Mobile Markets in 2021



Source: App Annie Intelligence

Note: Downloads across iOS, Google Play and third-party Android in China combined; Time spent is Android phones only; Spend is gross — inclusive of any percent taken by the app stores

Hours Spent in Apps by Category



Source: App Annie Intelligence
Note: Android phones

MACRO MOBILE TRENDS

7 of Every 10 Minutes on Mobile Was Spent in Social and Photo & Video Apps in 2021

As time increases on mobile in emerging categories, consumers are also engaging deeper in early-mover categories like Social, Communication and Photo & Video apps.

While Photo & Video apps (e.g. *YouTube* and *TikTok*) have seen an increase in market share of time spent, this has largely not been at the expense of current habits. Rather, consumers have turned historically 'non-mobile' time into time spent in apps and games.

The pandemic accelerated existing mobile habits, which have solidified in 2021. While social dominates for time spent globally, regional differences in app preferences highlight unique market differences. [Discover local trends in App Annie.](#)

MACRO MOBILE TRENDS

Mobile Ecosystem Healthier Than Ever: Publishers Released 2 Million New Apps & Games in 2021

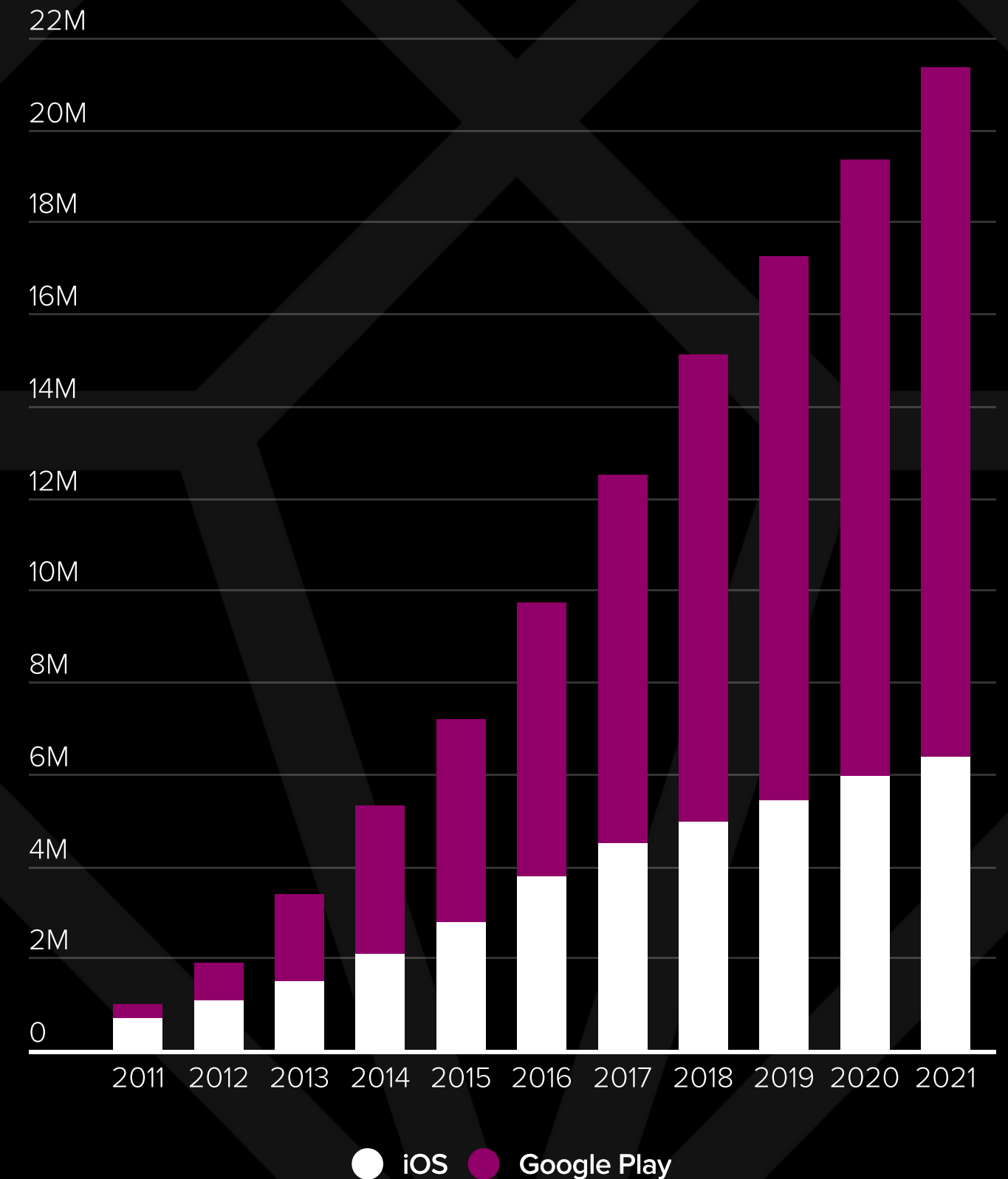
This brings the total of apps and games ever released on iOS and Google Play to over 21 million.

Google Play accounted for 77% of all apps and games releases in 2021. Across both iOS and Google Play, Games represented 15% of all new releases in 2021. The remaining 85% of new apps span all categories of the app stores, from mobile-first movers like social to mobile-forced industries like insurance and healthcare.

Apps are also removed and phased out overtime to leave the current live apps and games available to download on the app stores at 5.4 million (1.8 million on iOS and 3.6 million on Google Play).

With smartphones providing unparalleled reach and access to billions of consumers worldwide, every industry is a mobile-focused industry — New app releases illustrates the demand for engaging customers on mobile. Keep tabs on the rapidly-changing competitive landscape with App Annie.

Cumulative Number of Apps Released by Store



Source: App Annie Intelligence. Note: Number of apps released as of December 2021. Release date is based on app metadata on iOS App Store or Google Play in any country

MACRO MOBILE TRENDS

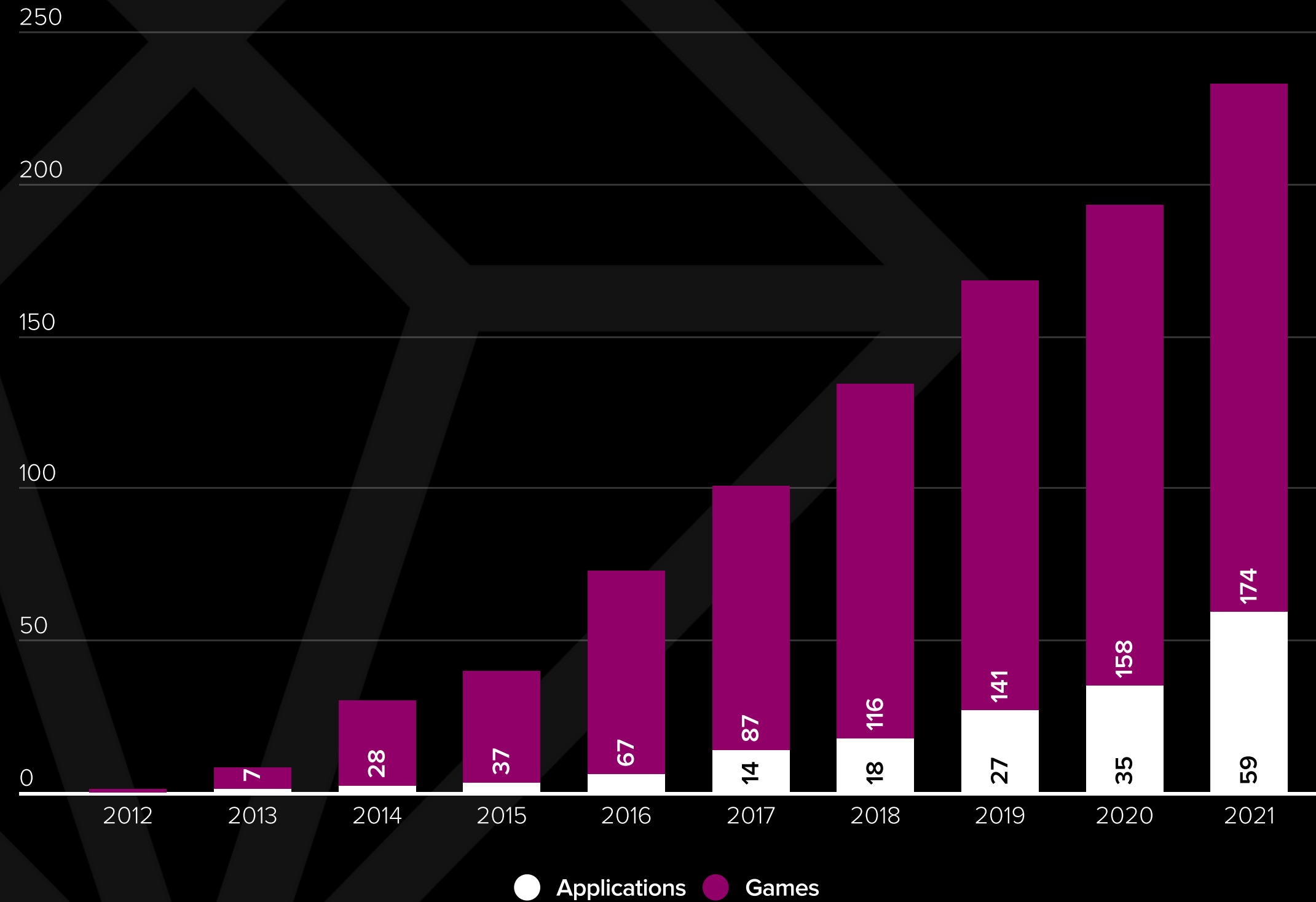
233 Apps & Games Generated Over \$100 Million Dollars Annually in 2021

Consumers migrated more of their entertainment and games consumption onto mobile. In 2021, there were over 230 apps and games surpassing \$100M in annual consumer spend, with 13 of them surpassing \$1 Billion.

This was up 20% from 2020 at 193 apps and games over \$100M in annual spend, and only 8 over \$1 Billion.

Improved connectivity, screen size and hardware have made it easier than ever before to enjoy premium applications & gaming experiences on-the-go. Consumers, consequently, migrated share of wallet to mobile as the de facto gaming console and tool for managing our lives. [View top grossing apps in App Annie.](#)

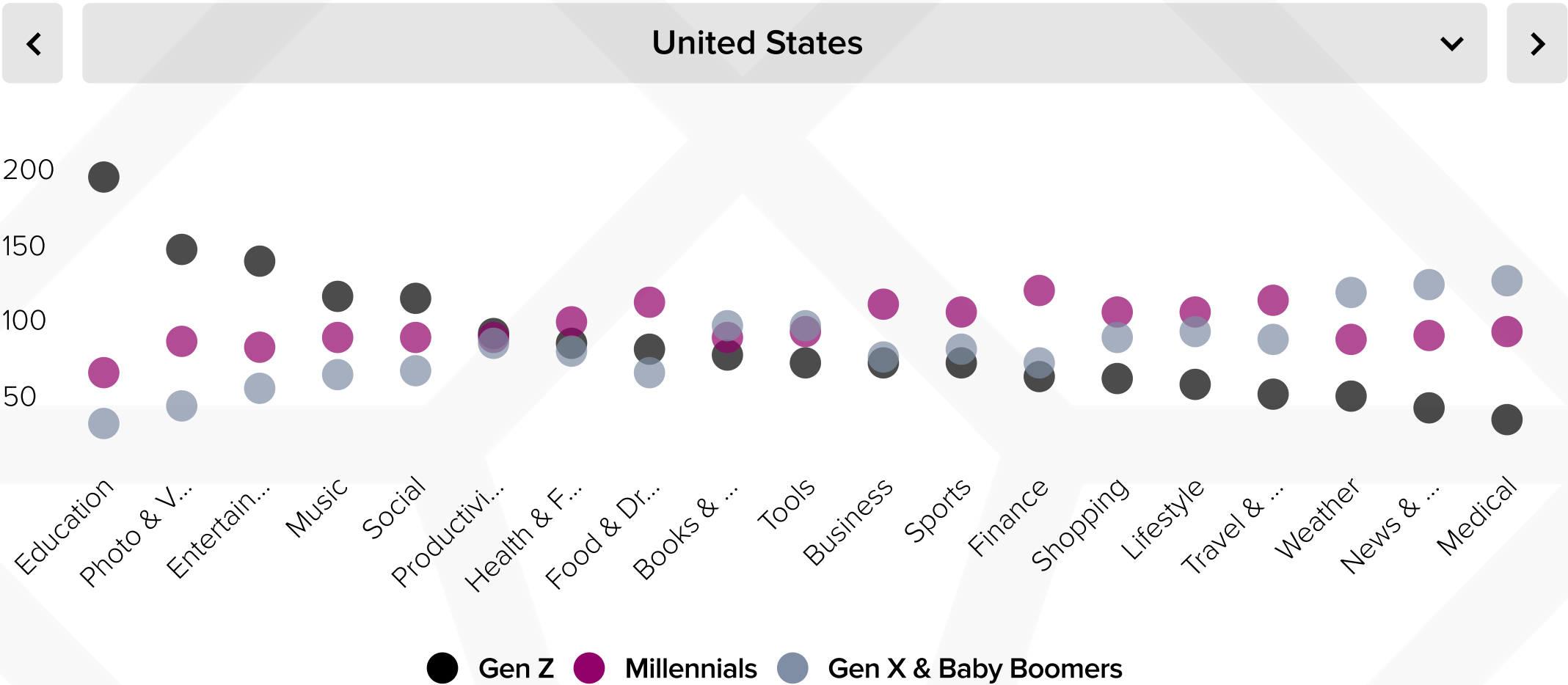
Number of Apps Surpassing \$100 Million in Annual Global Consumer Spend



Source: App Annie Intelligence
Note: Consumer Spend across iOS, Google Play, iOS only for China; Spend is gross — inclusive of any percent taken by the app stores

Average Age Group Index Among Top Apps Per Category

Index >100 Skews Towards Demographic Group



Top Apps by MAU by Likelihood of Use

- Gen Z**
- 1 Instagram
 - 2 Spotify
 - 3 Netflix
 - 4 Snapchat

- Millennials**
- Facebook
 - Facebook Messenger
 - WhatsApp Messenger
 - eBay

- Gen X & Baby Boomers**
- BOM Weather
 - Check In Qld
 - Service Victoria
 - Stocard

Source: App Annie Intelligence Note: 2021, Android phones; Average of Top 20 apps by MAU per category; Gen Z represented by those aged 16 -24; Millennials represented by those aged 25-44; Gen X and Baby Boomers represented by those aged 45+

MACRO MOBILE TRENDS: DEMOGRAPHICS

Gen Z is a Mobile Social & Video First Generation

Apps in categories that are already highly relevant to Gen Z can be excellent partners to help you increase engagement, including Photo & Video, Entertainment, and Social.

Finance and Shopping apps haven't managed to reach a broad Gen Z audience, but these categories have experienced strong growth YoY and represent a promising area for investment. These categories tend to skew more towards Millennials at this stage.

Mobile data unearths opportunities for reaching Gen Z: whether its an underserved market or a highly-engaged vertical to leverage. Uncover how app preferences change by generation in App Annie.

Market Differences Emerge by Gender Based on App Category

Sports apps overindex heavily with males in each market analyzed, whereas Food & Drink apps tend to skew more female. However, the difference can be subtle in the case of the US for Food & Drink and more dramatic in other markets like Japan.

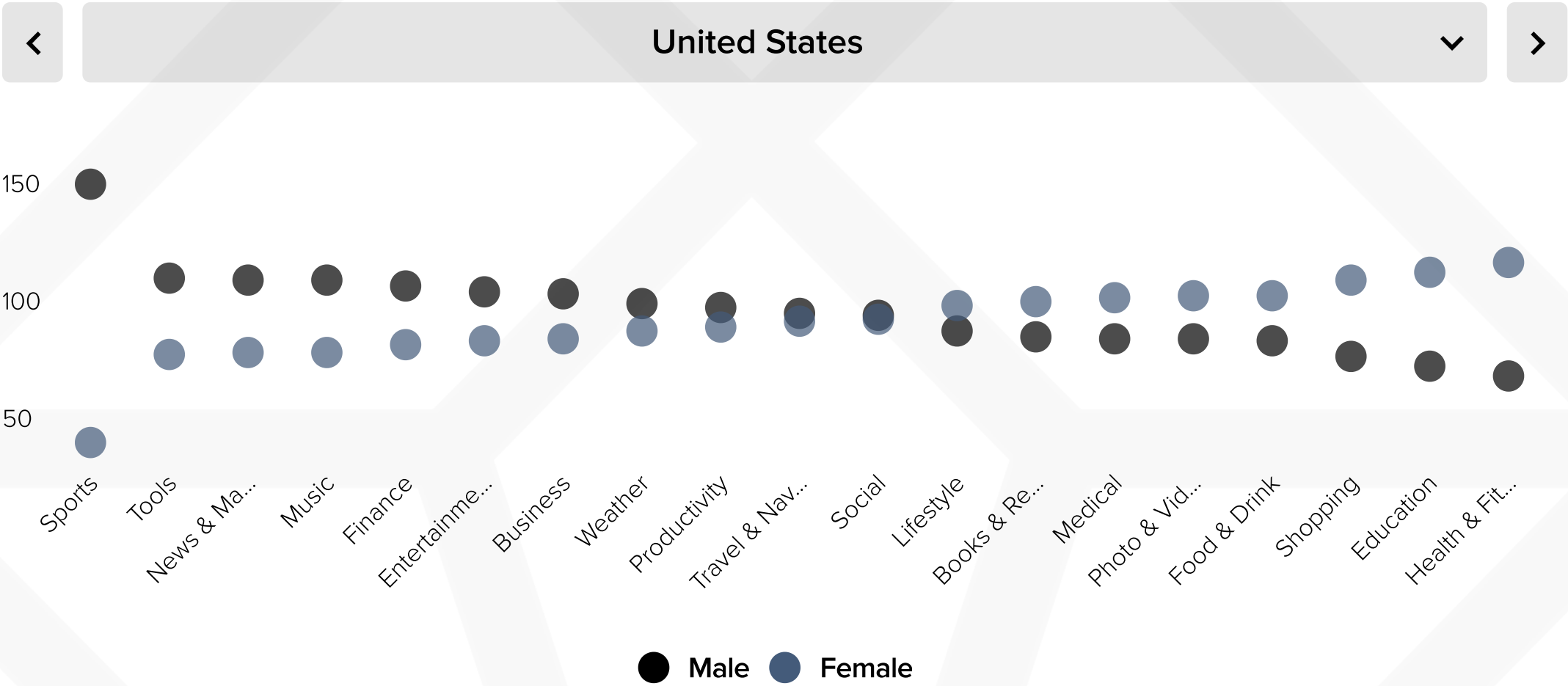
We also see that the most used apps in each country tend to buck category. For instance, Shopping apps on the whole tend to skew more female overall, yet *Amazon* skews more male in Japan, the UK, Germany, France and Canada. Only in the US does *Amazon* skew more female.

Our analysis is limited to males and females only and is not representative of all gender identities.

Mobile demographic data gives you a benchmark for your industry and allows you to spot differences in your and your competitor's audience, which can be critical for user acquisition. [View demographics splits in App Annie.](#)

Average Gender Group Index Among Top Apps Per Category

Index >100 Skews Towards Demographic Group

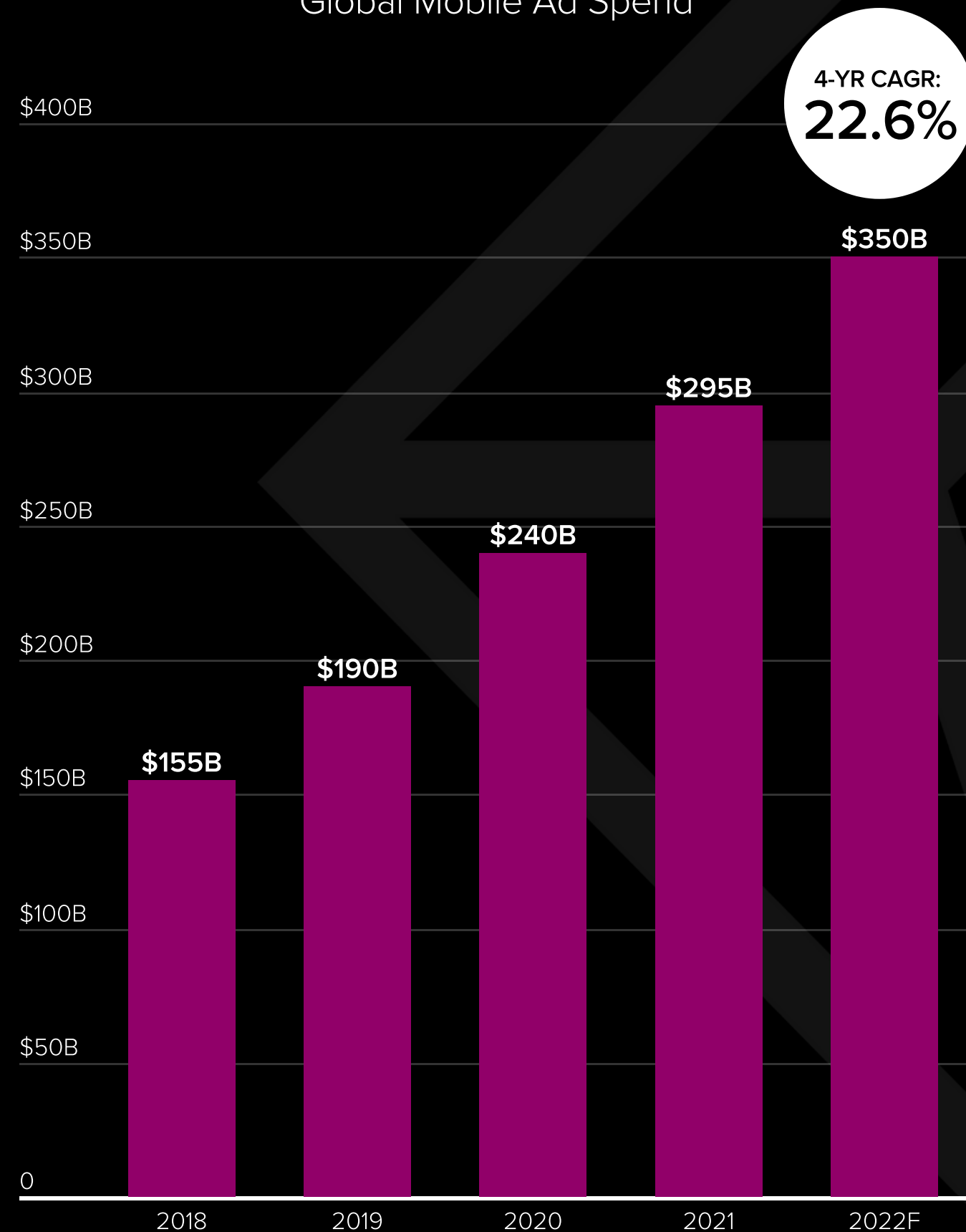


Top Apps by MAU by Likelihood of Use

Male		Female	
1	 WhatsApp Messenger	 Facebook	
2	 eBay	 Facebook Messenger	
3	 CommBank	 Instagram	
4	 Microsoft Outlook	 Spotify	

Source: App Annie Intelligence Note: 2021, Android phones; Average of Top 20 apps by MAU per category; Gender represented as Male and Female only and is not representative of all gender identities

Global Mobile Ad Spend



Source: App Annie Intelligence

MACRO MOBILE TRENDS: ADVERTISING

Despite IDFA Fears, Dollars Flocked to Mobile Ads — Topping \$295B in 2021, up 23% YoY and Poised to Hit \$350B in 2022

Mobile is driving digital ad spend globally. Amidst an economic rebound with GDP up 5.9% in 2021, cyclical events like the Tokyo Olympics and UEFA Euro Tournament, and engrained mobile habits, ad dollars flowed to mobile as the primary and captive channel for engaging consumers — representing 70% of digital spend.

With the Beijing Olympics in 2022 and US mid-term elections, digital ad spend is set to be robust with the majority driven by mobile. Brand marketing vs performance marketing is set to pick up as businesses and brands capitalize on mobile's broad and captive audience amidst the backdrop of IDFA deprecation.

Monitor the changing best practices in mobile advertising, pinpoint ad creatives are performing best and decode the growth strategies of the leaders in the mobile user acquisition. Uncover advertising insights in App Annie.

The Most Searched iOS App Store Keywords in 2021

<

Business

>

Rank	Australia	Brazil	Canada	China	France	Germany	India	Indonesia	Japan	Mexico	Russia	South Korea	Turkey	United Kingdom	United States
1	australia	google meet	job	boss直聘	scanner	teams	whatsapp+	zoom	zoom	zoom	zoom	zoom	edevlet	scanner app	zoom
2	seek	zoom	zoom	企查查	zoom	zoom	zoom	google meet	yahoo	meetings	почта россии	줌	türkiye	zoom	microsoft teams
3	australia post	meet	linkedin	天眼查	teams	scanner app	google meet	meet	teams	meet	hh.ru	알바몬	zoom	teams	indeed
4	job	claro	indeed	腾讯会议	linkedin	pdf scanner	whatsapp business	meetings	やふー	google meet	зум	알바천국	linkedin	scanner	teams
5	zoom	linkedin	teams	阿里云	pôle emploi	scanner app kostenlos	call recorder for iphone free	pdf	やふー	teams	сканер	한글	işkur	microsoft teams	microsoft authenticator
6	linkedin	meetings	canada post	wps	camscanner	autoscout24	scanner	linkedin	やふー	microsoft teams	леруа мерлен	알바	stream	scanner app free	duo mobile
7	jobs	teams	microsoft teams	企业微信	indeed	microsoft teams	teams	pln	まいなぽいんとアプリ	pdf	мой налог	사람인	meetings	linkedin	linkedin
8	microsoft teams	vagas de emprego	chat	顺丰	whatsapp business	microsoft authenticator	linkedin	jobstreet	ずーむ	linkedin	лукойл	블라인드	meet	indeed	google meet
9	xero	minha claro	google meet	今日头条	pdf	linkedin	zoom meeting	scanner	zoom アプリ無料	stream	teams	pdf	teams	cam scanner	the zoom app for iphone
10	teams	cpf	services	钉钉	ornikar	pdf	scanner for iphone	jne	zoom アプリ無料	chat	сканер документов	스캔	pdf	uber driver	scanner app

Uncover trends in App Store Optimization (ASO) in and competitive insights on app store search traffic, keyword rankings and paid app store search ads in App Annie.

Source: App Annie Intelligence Note: iPhones; ranked by average Search Volume

Gaming

Jam City's business has experienced terrific growth over the years and we head into 2022 with billions in aggregate lifetime revenue and tens of millions of players around the world. App Annie has remained a valued partner whose market intelligence platform provides industry benchmarking and competitive insights across the mobile ecosystem which our team uses daily to help drive our continued success at scale.

Josh Yguado
President and COO
Jam City

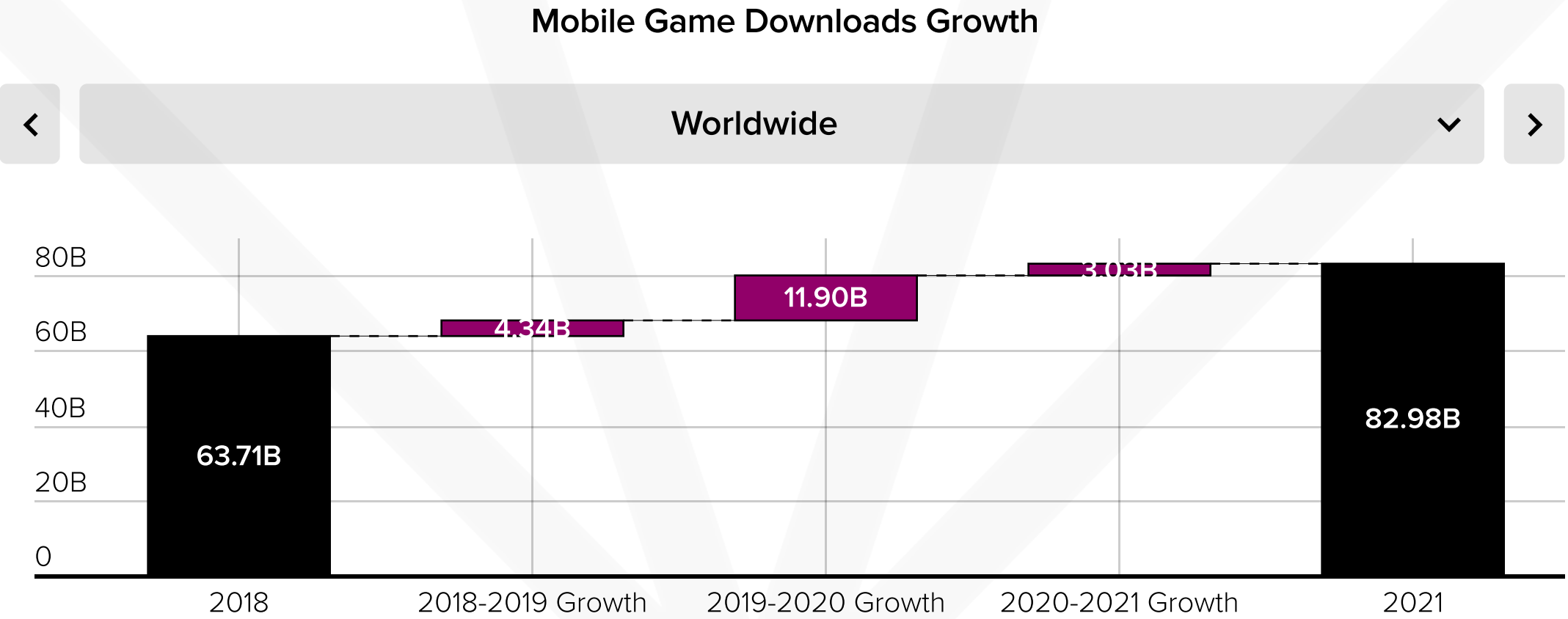
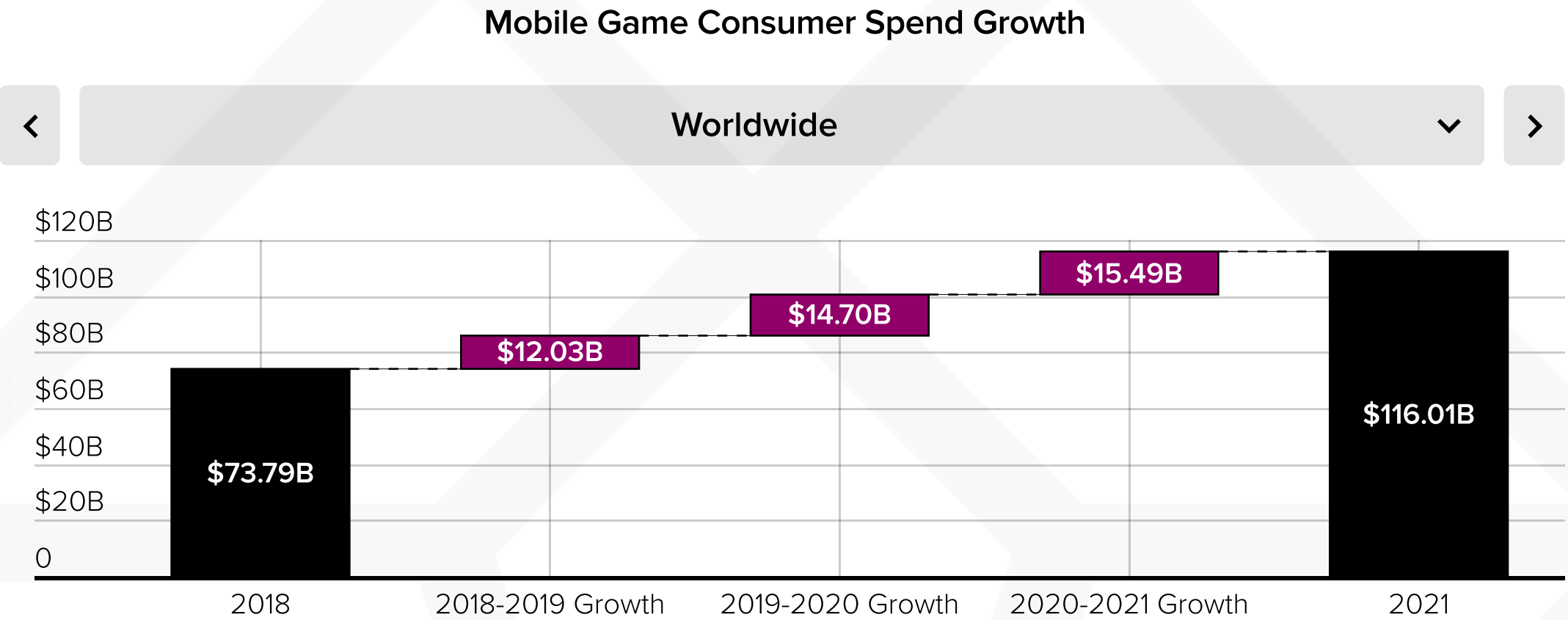


Additional \$16 Billion in Gaming Consumer Spend was Added in 2021, Bringing Total to \$116 Billion

In 2021, hit games such as *Roblox* and *Genshin Impact* saw further growth in consumer spend as mobile games are now capable of offering console-like graphics and gameplay experiences. The gaming scene in China has seen renewed excitement over the release of *Harry Potter Magic Awakened* and *League of Legends: Wild Rift* in H2 2021, and we expect these to further occupy the top revenue charts in the coming months and further add to global mobile gaming growth.

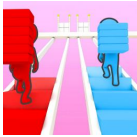
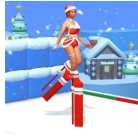
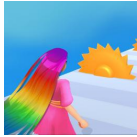
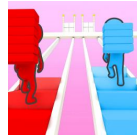
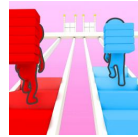
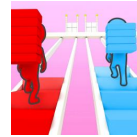
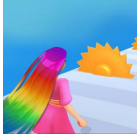
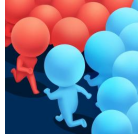
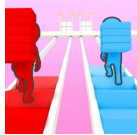
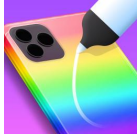
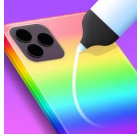
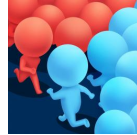
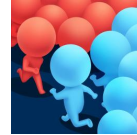
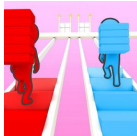
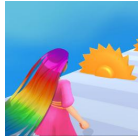
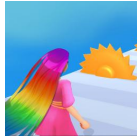
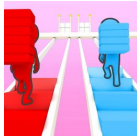
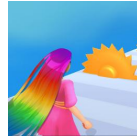
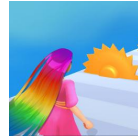
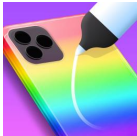
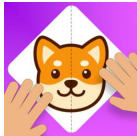
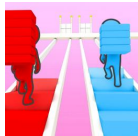
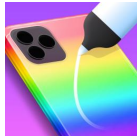
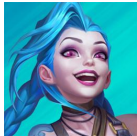
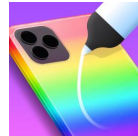
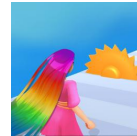
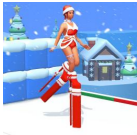
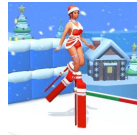
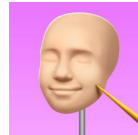
Hypercasual games like *Bridge Race* and *Hair Challenge* were key downloads driver, but 2021 saw some well known IPs such as *Pokémon UNITE*, and *PUBG: NEW STATE* making major gains in downloads and usage.

Mobile game sustained strong momentum from pandemic surge — 2021 in gaming was as dynamic as any previous year. The time to act is now.



Source: App Annie Intelligence Note: Downloads across iOS, Google Play and third-party Android in China combined; Time spent is Android phones only; Spend is gross — inclusive of any percent taken by the app stores

2021 Breakout Rankings by Market | Games

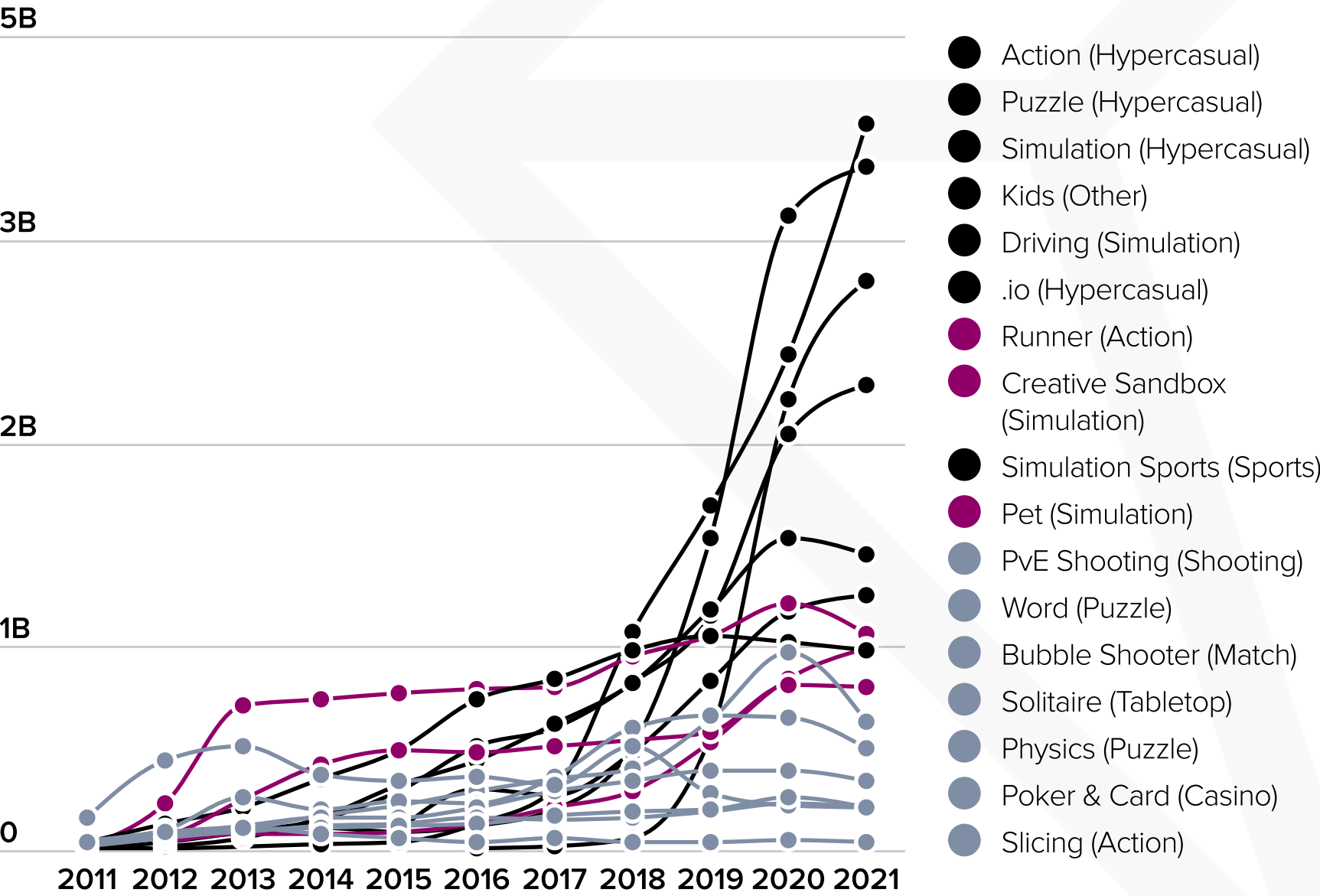
	AMER - Breakout Downloads								
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	 Bridge Race	 High Heels	 High Heels	 Crash Bandicoot: On the Run	 Hair Challenge	 Count Masters	 Bridge Race	 Bridge Race	 Bridge Race
2	 Hair Challenge	 Project Makeover	 Count Masters	 Bridge Race	 Phone Case DIY	 Phone Case DIY	 Count Masters	 DOP 2: Delete One Part	 Count Masters
3	 Count Masters	 Bridge Race	 Hair Challenge	 Hair Challenge	 Crash Bandicoot: On the Run	 Bridge Race	 Hair Challenge	 Hair Challenge	 My Talking Angela 2
4	 Phone Case DIY	 Paper Fold	 Bridge Race	 Phone Case DIY	 League of Legends: Wild Rift	 DOP 2: Delete One Part	 Going Balls	 Phone Case DIY	 Hair Challenge
5	 High Heels	 Count Masters	 Project Makeover	 Count Masters	 Sculpt people	 Fidget Toys 3D	 High Heels	 Sculpt people	 Fidget Toys Trading 3D

Learn More: [Uncover the Top Games by Change in Yearly Downloads](#)

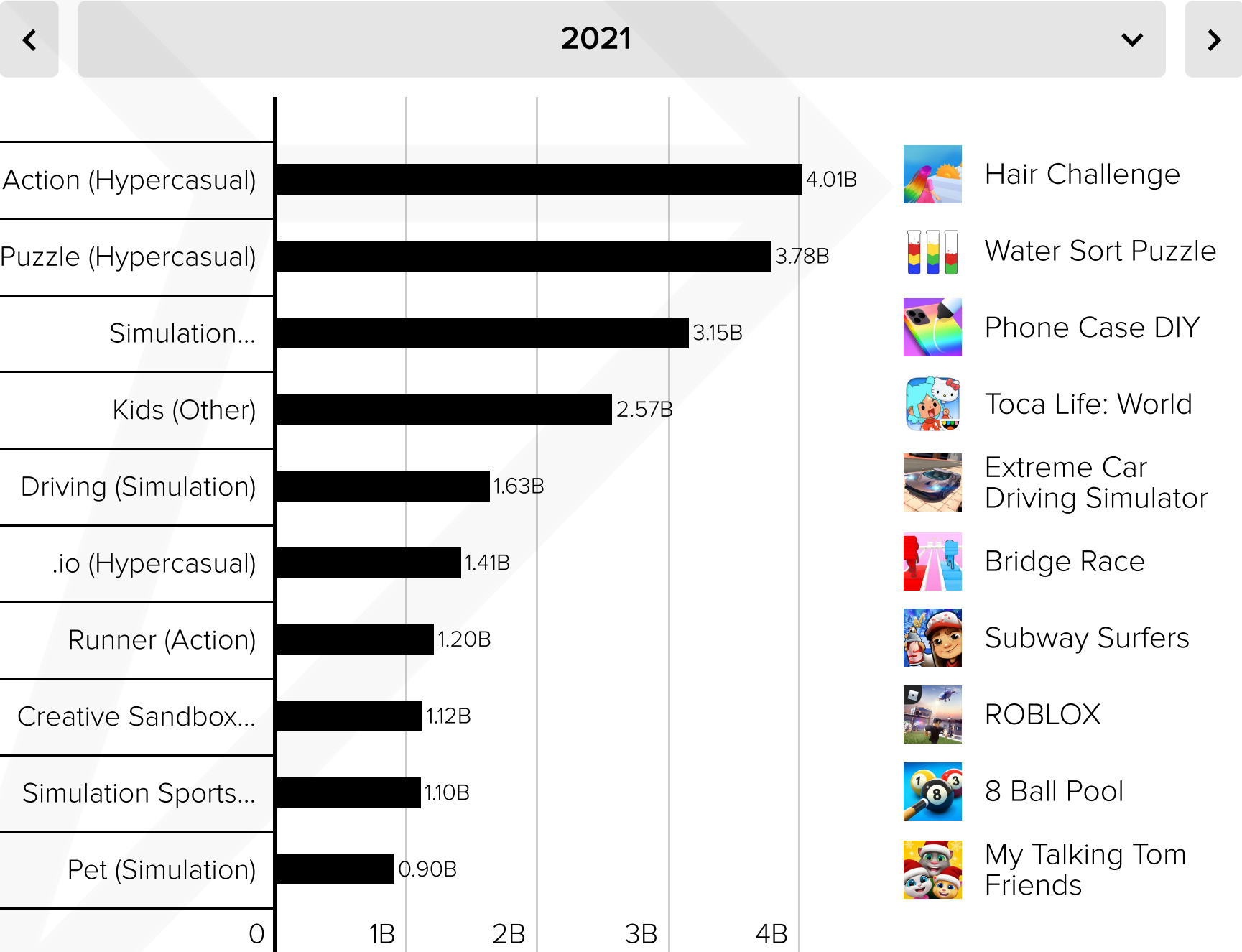
Source: App Annie Intelligence Note: Top Apps by year-over-year Downloads, Consumer Spend and Average Active User Growth across iOS, Google Play. MAU Growth on iPhones and Android Phones

Astronomical Rise of Hypercasual: Innovation & Shifting Player Preferences Gave Way to Emerging Game Genres

Yearly Evolution of Top Genres by Downloads
2021 Top Genres 2021's Top Genres in 2011 2011 Top Genres



Worldwide | Top Gaming Subgenres & Top Games by Downloads



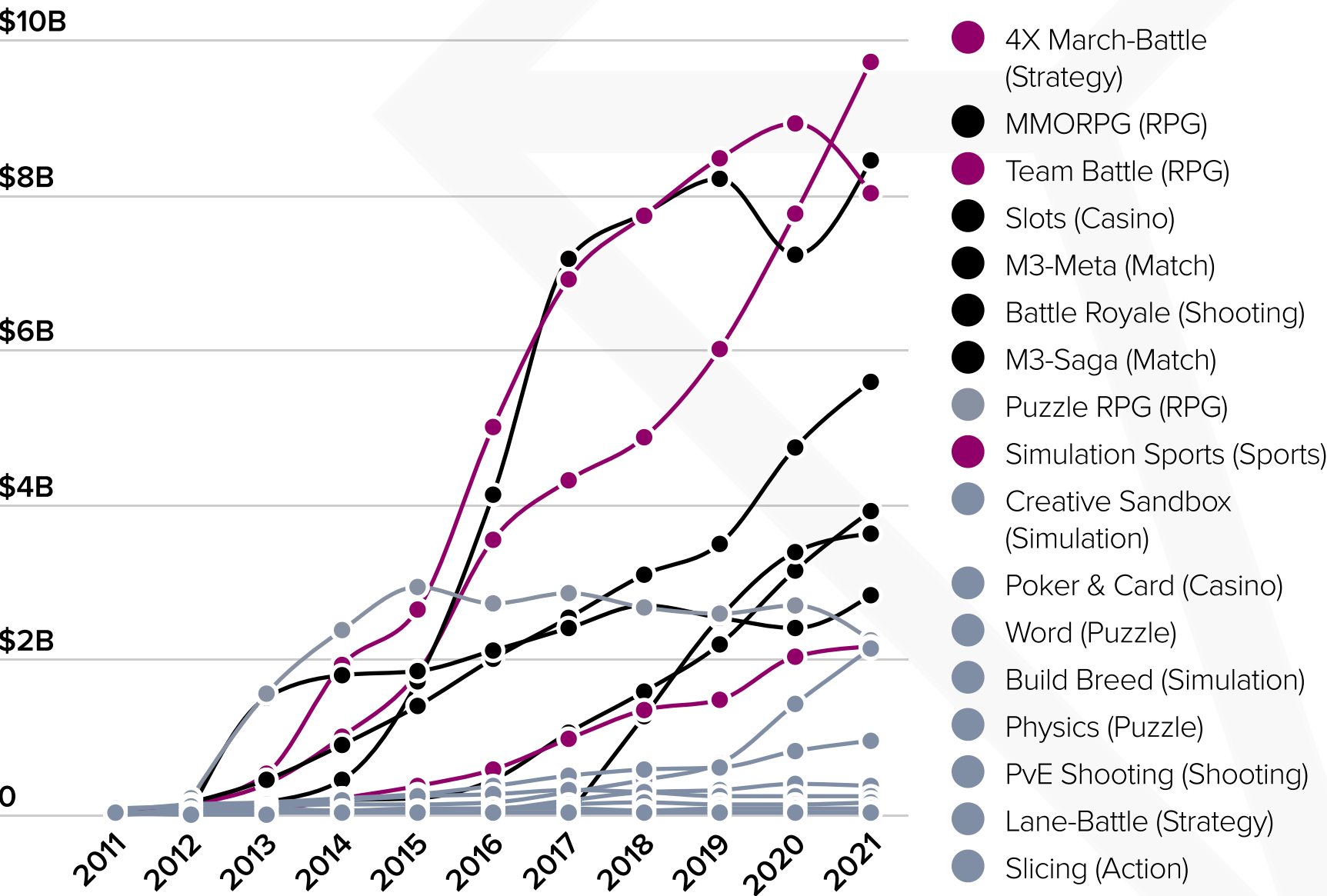
[Analyze More Genres in App Annie's Game IQ Market Sizing Report](#)

Source: App Annie Intelligence Note: Downloads across iOS, Google Play. China is iOS only. Genre breakdown based on App Annie Game IQ Taxonomy as of January 7th, 2022

4x March-Battle Strategy Games Emerged as the Most Monetizable Genre for Mobile Games

Yearly Evolution of Top Genres by Consumer Spend

2021 Top Genres 2021's Top Genres in 2011 2011 Top Genres



Worldwide | Top Gaming Subgenres & Top Games by Consumer Spend

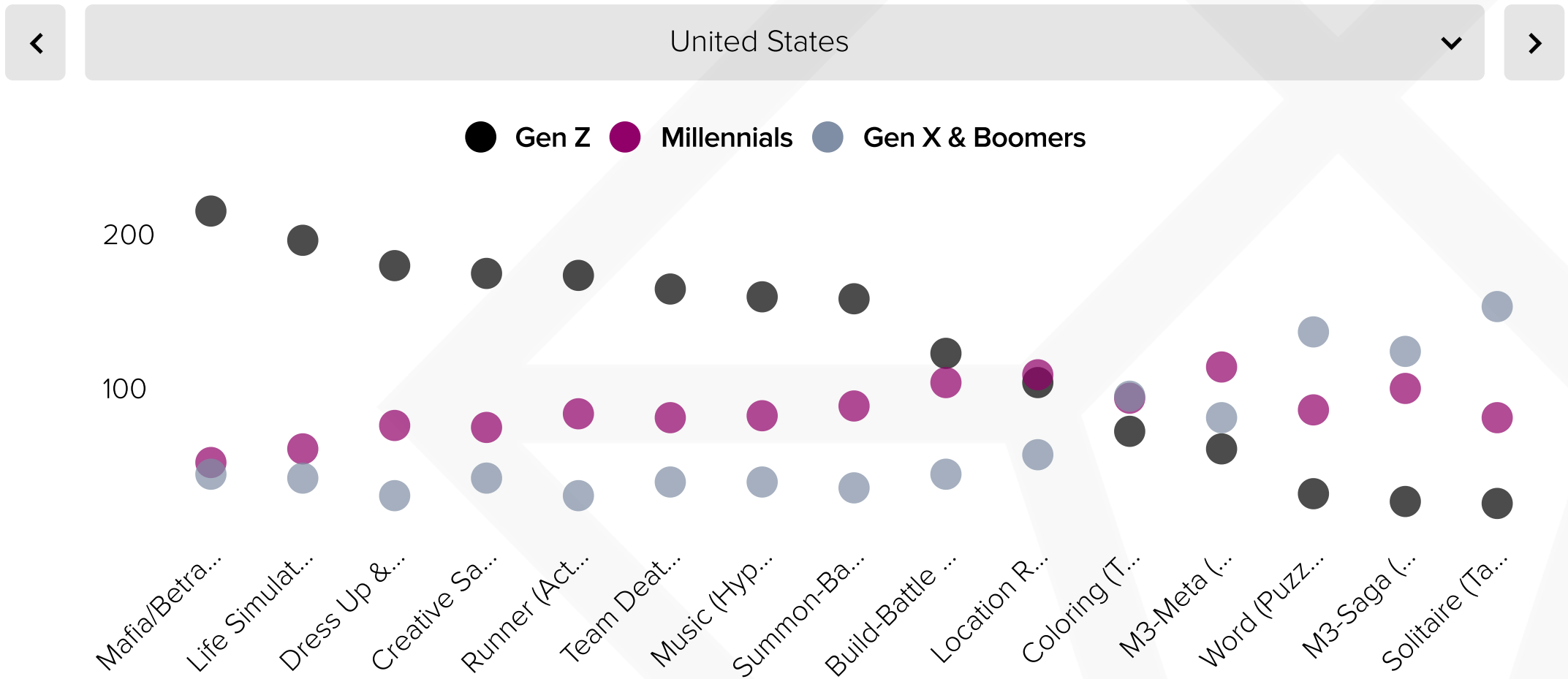


[Analyze More Genres in App Annie's Game IQ Market Sizing Report](#)

Source: App Annie Intelligence Note: Downloads across iOS, Google Play. China is iOS only. Genre breakdown based on App Annie Game IQ Taxonomy as of January 7th, 2022

Average Age Group Index Among Select Subgenres

Index >100 Skews Towards Demographic Group



Top Games by MAU Most Likely to Be Played by Age Group

Gen Z			Millennials			Gen X & Baby Boomers		
1		ROBLOX		Creative Sandbox (Simulation)		Project Makeover		M3-Meta (Match)
2		Among Us!		Mafia/Betrayal (Party)		Coin Master		Luck Battle (Party)
3		Pokémon GO		Location RPG (RPG)		Homescapes		M3-Meta (Match)
								Candy Crush Saga
								Wordscapes
								New Words With Friends
								M3-Saga (Match)
								Word (Puzzle)
								Word (Puzzle)

Source: App Annie Intelligence Note: 2021, iPhone and Android phones; Gen Z represented by those aged 16 -24; Millennials represented by those aged 25-44; Gen X / Baby Boomers represented by those aged 45+; Average of Demographics Index (a measure of demographic cohort compared to the overall population) among top 10 apps by average MAU per Genre.

GAMING

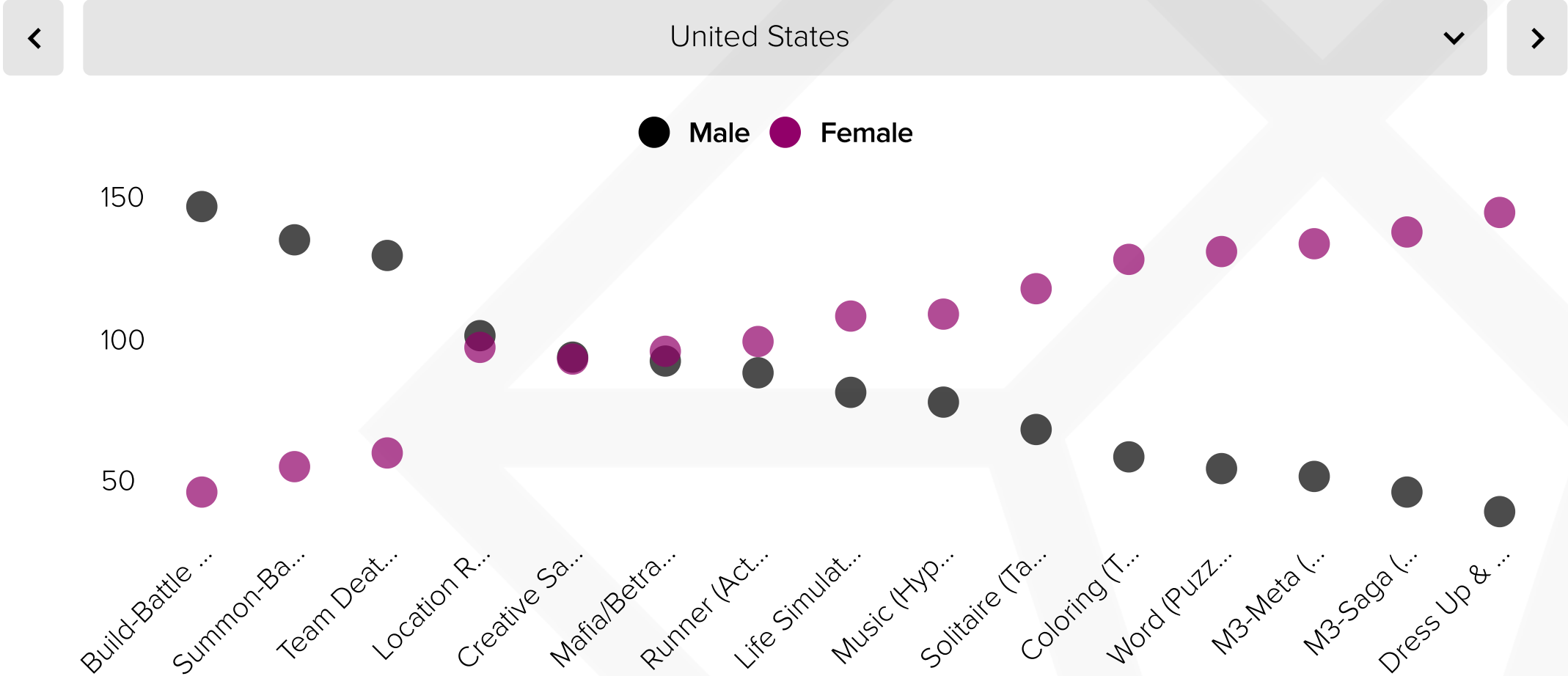
Party, Simulation, Shooters & RPG Skew Towards Gen Z; Match 3 & Puzzle Preferred By Older Age Groups

Gen Z gamers in the markets analyzed are around 2.0x more likely to play Mafia/ Betrayal (Party) games such as *Among Us!*, while Gen X & Boomers in the US and UK are around 1.5x more likely to play Solitaire (Tabletop) games compared to the average population.

Understanding demographics segmentation can help you build out marketing campaigns and partnerships for games with demographics that match your target audience. [View the most used games by age group in App Annie over time, by device and in different markets.](#)

Average Gender Group Index Among Select Subgenres

Index >100 Skews Towards Demographic Group



Top Games by MAU Most Likely to Be Played by Gender Group

Male			Female		
1		Pokémon GO		ROBLOX	Creative Sandbox (Simulation)
2		Call of Duty: Mobile		Among Us!	Mafia/Betrayal (Party)
3		Clash Royale		Candy Crush Saga	M3-Saga (Match)

Source: App Annie Intelligence Note: 2021, iPhone and Android phones; Average of Demographics Index (a measure of demographic cohort compared to the overall population) among top 10 apps by average MAU per Genre

GAMING

Match 3 Games Tend to Skew Towards Female Audience, While Build-Battle Games Skew Male

In the US, France and Japan, female gamers are around 1.3x more likely to use 4X M3-Saga (Match) games, and male gamers in the US are 1.7x more likely to play Build-Battle (Strategy) games than the general population.

Not only are Among Us! and ROBLOX clear favorites among Gen Z, they also have higher tendency to be played by female audiences. Pokémon GO has enjoyed widespread popularity globally, but tends to skew towards a male audience.

App Annie's audience index can further show you where the specific demographic group is engaging on mobile. Dive Deeper into Genre Demographics in the Genre Summary Report.

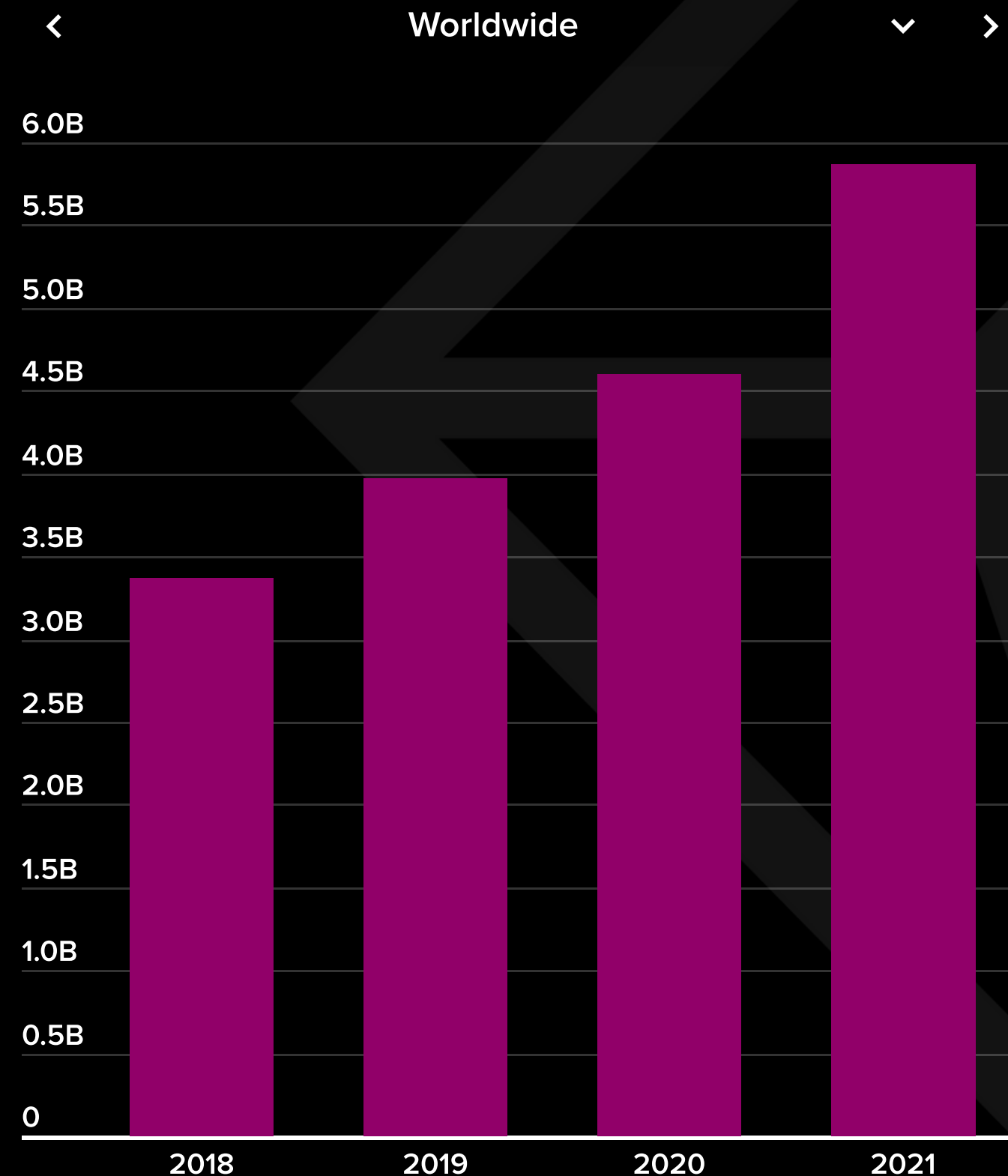
Finance

Consumers have shown how much they love the convenience and control of our all-in-one shopping app. From shopping inspiration and payment methods to transparent banking, budgeting features and post-purchase services, the Klarna app helps consumers to save time and money at every step of the shopping journey. With 70% of mobile shoppers looking for a single app that better unites services and features instead of switching between apps, Klarna is optimally positioned to become the world's favorite way to shop, pay and bank.

David Sandström
Chief Marketing Officer
Klarna

The Klarna logo, consisting of the word "Klarna." in a bold, sans-serif font, enclosed within a light blue rounded rectangle.

Finance App Downloads by Country



Source: App Annie Intelligence

Note: Downloads across iOS, Google Play; China is iOS only

FINANCE

Finance App Downloads in India Surpassed 1B in 2021, Fueling the 28% YoY Increase in Finance App Downloads Worldwide to 5.9B

Although not the largest markets globally, Mexico, Indonesia, Argentina, and Brazil saw the largest growth over the past 4 years, up 250%, 185%, 180% and 175%, respectively.

In Latin America, there is a substantial underbanked community as 70% of their population does not have a bank account and nearly 80% does not have a credit card. Consumers are more willing to try alternatives to retail banks, such as neobanks, which tend to be more accessible to those without excellent credit and offer custom features better suited for specific needs.

Knowing high-growth areas is key for app publishers when determining their expansion strategies. Compare Finance app downloads over the years and track their market growth.

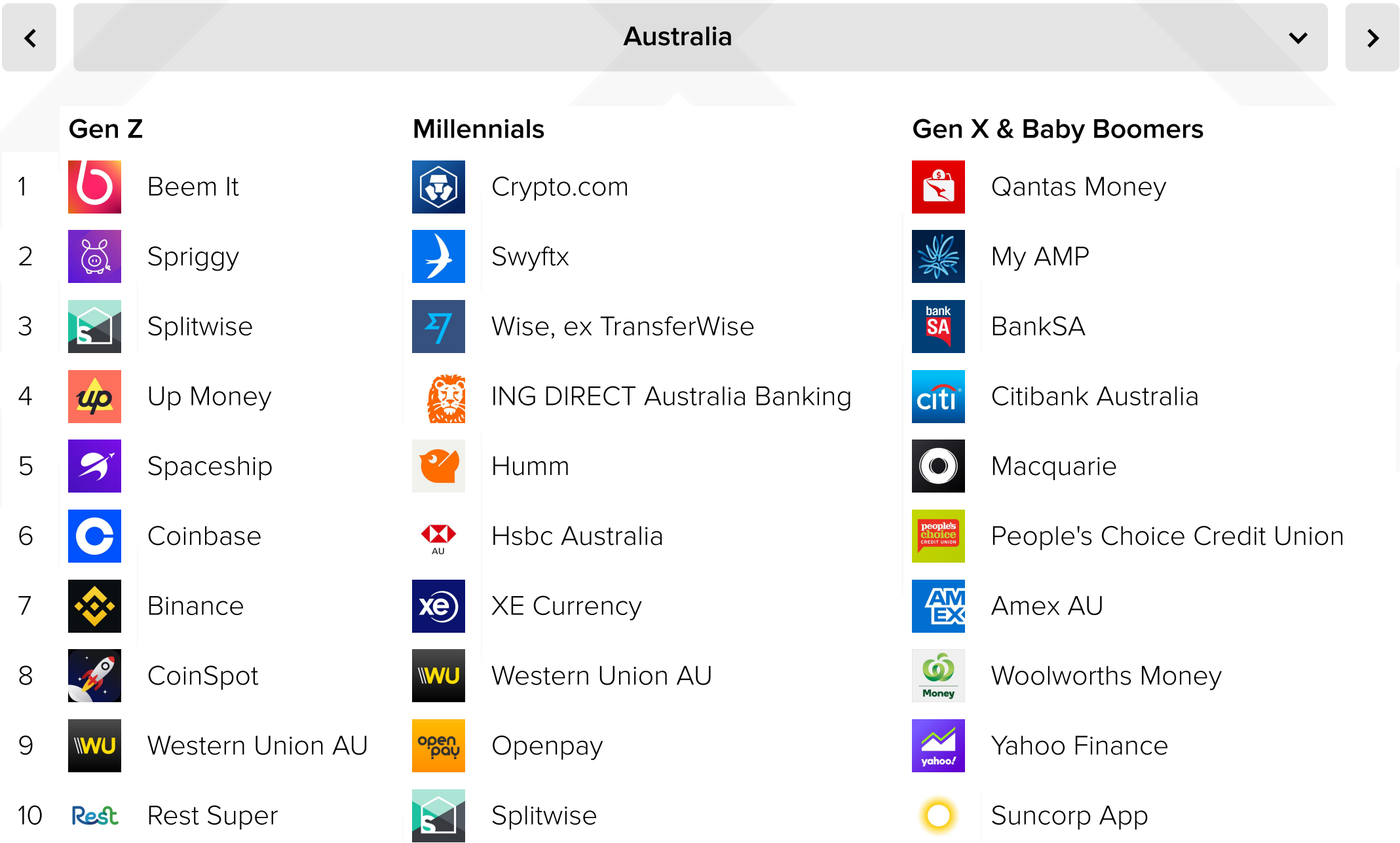
Embracing Innovation: Gen Z Are Most Likely to Use Neobanks and Cryptocurrency Trading Apps

Although retail banks are widely used by Gen X and Baby Boomers, Gen Z are most likely to use trading apps and neobanks across regions. In addition, they also prefer to use money transfer apps such as *Venmo*, *Cash App*, and *Splitwise* as they are increasingly comfortable using their mobile phones as a form of payment instead of cash.

Finance app publishers who wish to reach the next generation of mobile-savvy users should keep in mind what they now come to expect: fast and simple money movement and financial flexibility that tailors to their needs.

Compare the top finance apps by active users across countries in App Annie.

Top Finance Apps by MAU by Likelihood of Use



Source: App Annie Intelligence Note: 2021, iPhones and Android phones; Top 10 Finance apps used per age group indexed among the Top 50 apps overall by MAU in the Finance category; Gen Z represented by those aged 16 -24; Millennials represented by those aged 25-44; Gen X and Baby Boomers represented by those aged 45+

Neobanks Gain in Popularity as YONO SBI, Nubank, and PicPay Each Saw >30% YoY Increase in Average MAU Worldwide

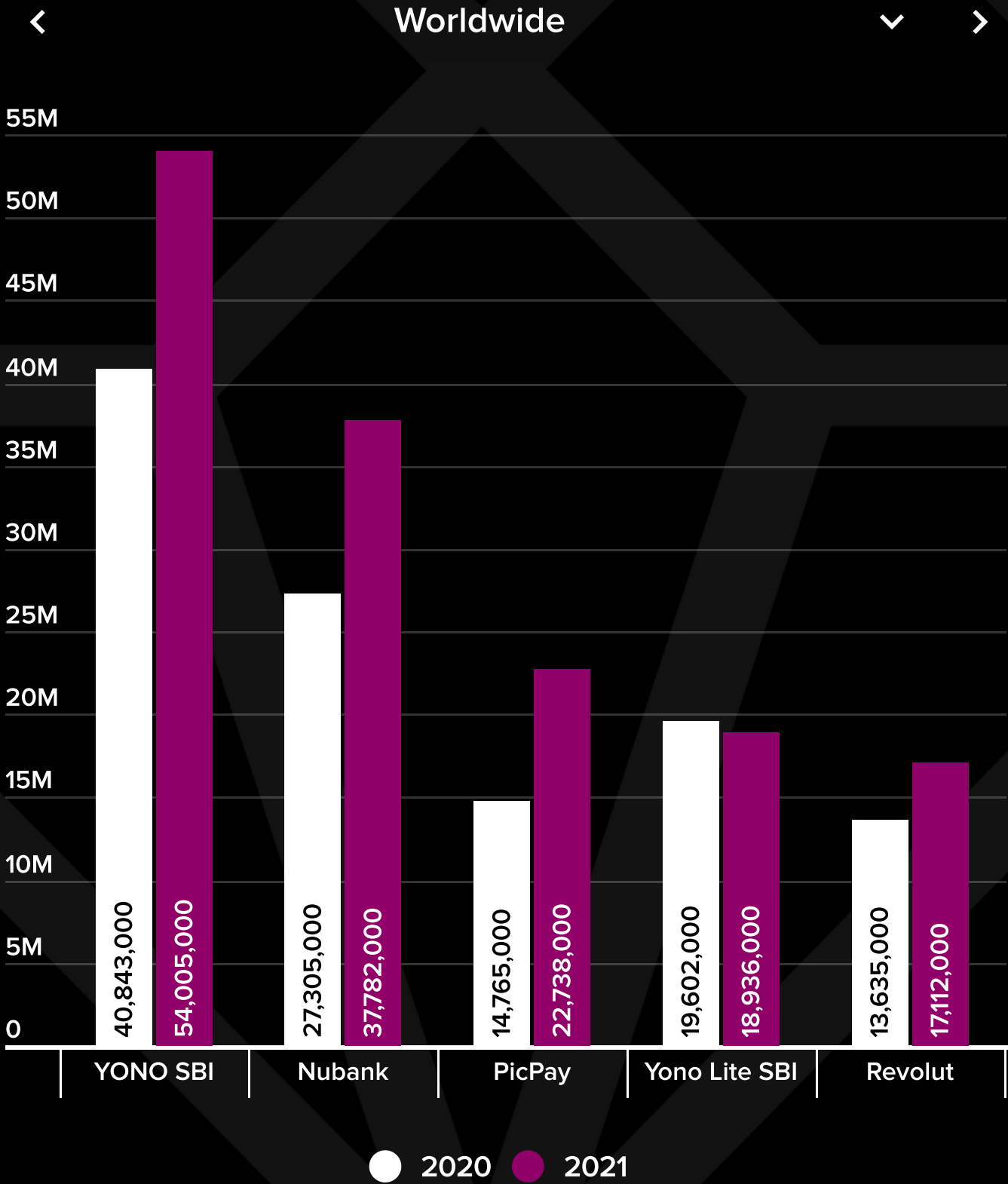
Most countries tend to use homegrown neobanks; Mexico is an exception, where *Brazil's Nubank* topped the charts across both countries.

In fact, Brazil is a hotspot for neobank adoption as it has a large population that currently does not have relationships with retail banks; *Nubank* and *PicPay* had the second and 3rd highest average MAU worldwide in 2021, while its *C6 Bank* and *Banco PAN* saw >200% growth in MAU YoY.

In contrast, Australia's user base, for example, rely less on neobanks due to the popularity of the advanced money movement capabilities within the region's existing retail banks.

Knowing the current offerings of existing finance apps and whether they serve the needs of the region's users is crucial for any finance app publisher. [Explore Brazil's Top Finance apps of 2021.](#)

Top 5 Neobanks by Average MAU in 2021



Source: App Annie Intelligence Note: iPhones and Android devices
Mydoh launched in May 2020 on iOS and in June 2021 on the Google Play Store.
Neo: BNC Bank launched in March 2021 across iOS and the Google Play Store.

FINANCE

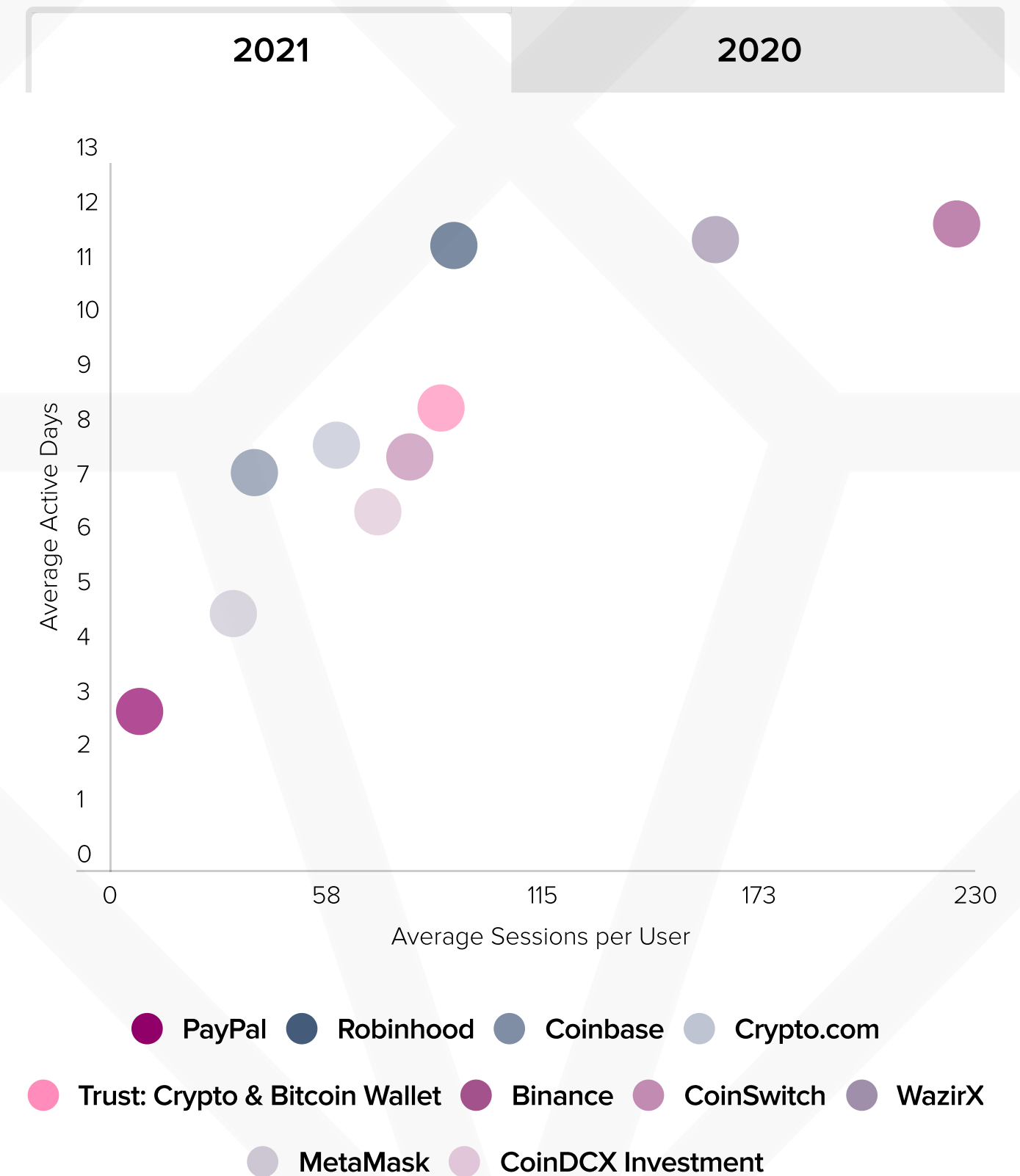
PayPal Entered the Cryptocurrency Market in 2021; Binance & WazirX Saw the Highest YoY Increase in Sessions Per User Worldwide

Although US-HQ'd publishers dominates the cryptocurrency space, taking up half of the top 10 most downloaded cryptocurrency apps worldwide, India was a rising contender in 2021.

CoinDCX Investment made a splash despite only launching in Q4 2020 across iOS and Google Play stores. Within one year, it has reached #9 worldwide in terms of the most downloaded cryptocurrency apps.

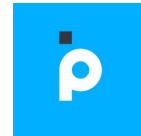
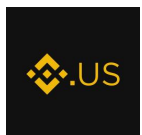
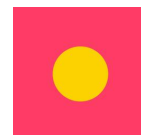
Although PayPal had the highest average MAU worldwide, Trust: Crypto & Bitcoin Wallet, Binance, and WazirX saw the highest increase in usage YoY; understanding the flexibility of their offerings that go beyond trading cryptocurrency assets is crucial for any app publisher that tries to emulate their successful adoption worldwide. Compare the top breakout cryptocurrency apps of 2021.

Monthly Engagement Among the Top 10 Cryptocurrency Apps by Worldwide Downloads in 2021



Source: App Annie Intelligence Note: Downloads across iOS, Google Play; usage data on Android only. Average Sessions per User represents the average number of sessions per active user in a given month throughout 2021. Average Active Days represents the average days of use across all active users in a given month throughout 2021. CoinDCX Investment was launched in Q4 2020 across iOS and Google Play Stores.

2021 Rankings by Market | Finance

	AMER - Breakout Downloads							
	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	 Coinbase	 Wealthsimple Trade	 Bienestar Azteca	 Banco PAN	 BNA	 PROFIN- Préstamos de Crédito	 Mi Banco	 Fpay Perú
2	 Crypto.com	 Crypto.com	 Stori	 iti Itaú: pagar e receber	 Billetera Santa Fe	 Nequi Colombia	 Mercado Pago	 iSolez
3	 Google Pay	 Binance	 iFectivo	 C6 Bank	 MODO	 Itaú Colombia	 Mi Pass	 Treinta - Gestión de tu pequeño negocio
4	 Webull	 Coinbase	 YumiCash	 Nubank	 Naranja X	 PayPal	 Muevo	 PayPal
5	 Binance.US	 Shakepay	 Préstamos de crédito en efectivo cash	 Bitz	 Binance	 Treinta - Gestión de tu pequeño negocio	 Mi Banco Chile	 Tunki

Learn More: [Uncover the Top Finance Apps by Change in Yearly Downloads](#)

Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; MAU is across iPhones and Android phones; Market-level rankings; Breakout defined as Year-over-Year growth in Downloads or average MAU

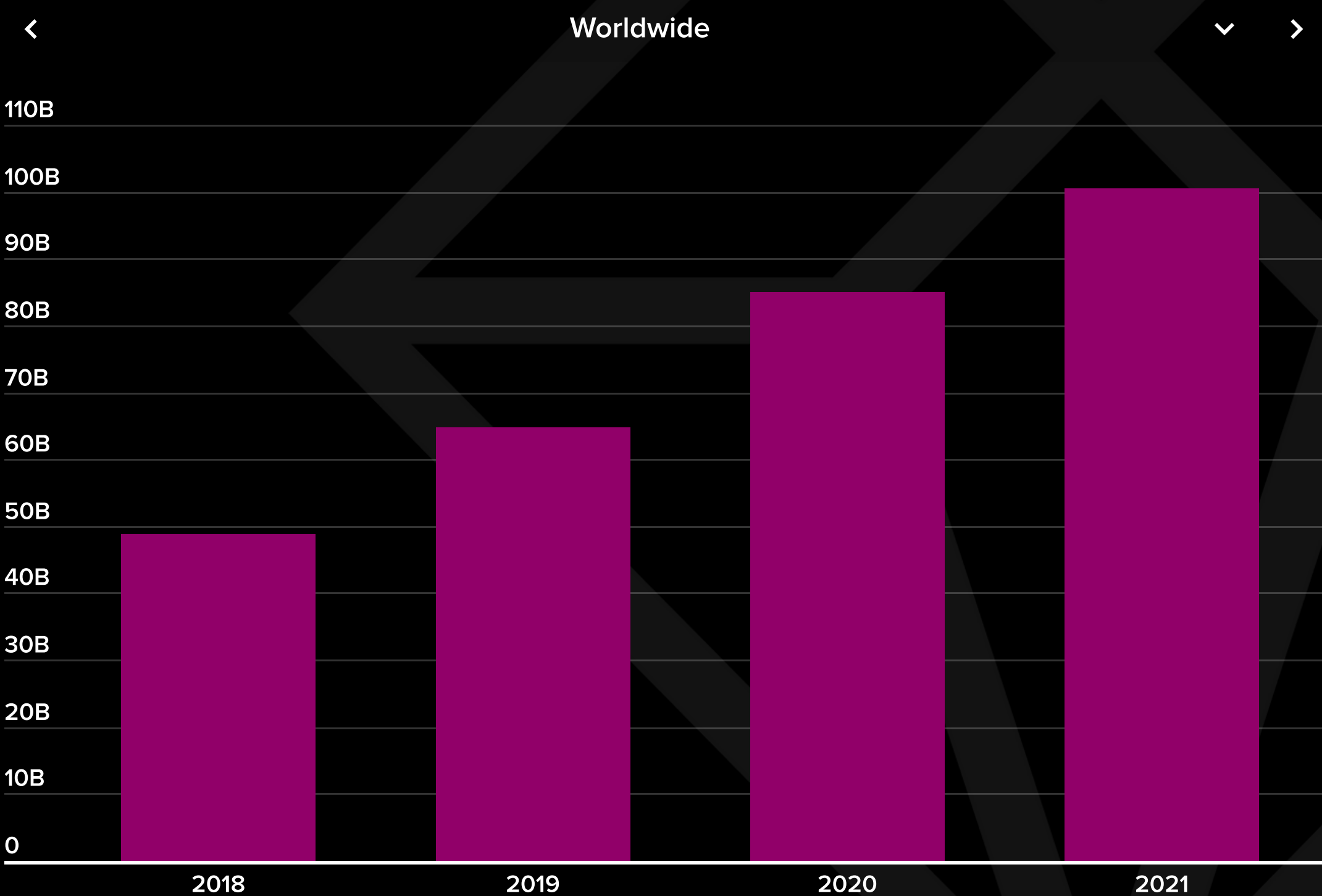
Retail

At ASOS, our vision is to be the go-to global destination for fashion loving 20-somethings - the place that our target consumers turn to for fashion. Our apps are critical in helping us realise that vision - enabling us to create a place that's inspiring, engaging and entertaining - with the technical agility, global scale, and resilience to continuously innovate and personalise our offering to become the fashion best friend of each of our customers.

Vijay Ram
Head of Technology - Mobile Apps
ASOS



Annual Hours Spent in Shopping Apps



RETAIL

Time in Shopping Apps Reached Over 100 Billion Hours Spent Globally

Time spent in Shopping apps rose 18% year-over-year, with strong movement in fast fashion, social shopping, and mobile-savvy big-box players.

Among the countries with the fastest growth were Indonesia, Singapore and Brazil at 52%, 46% and 45% growth YoY, respectively.

Mobile shopping habits catalyzed during COVID-19 have solidified. Monitor peak shopping periods in App Annie.

Source: App Annie Intelligence
Note: Android Phones

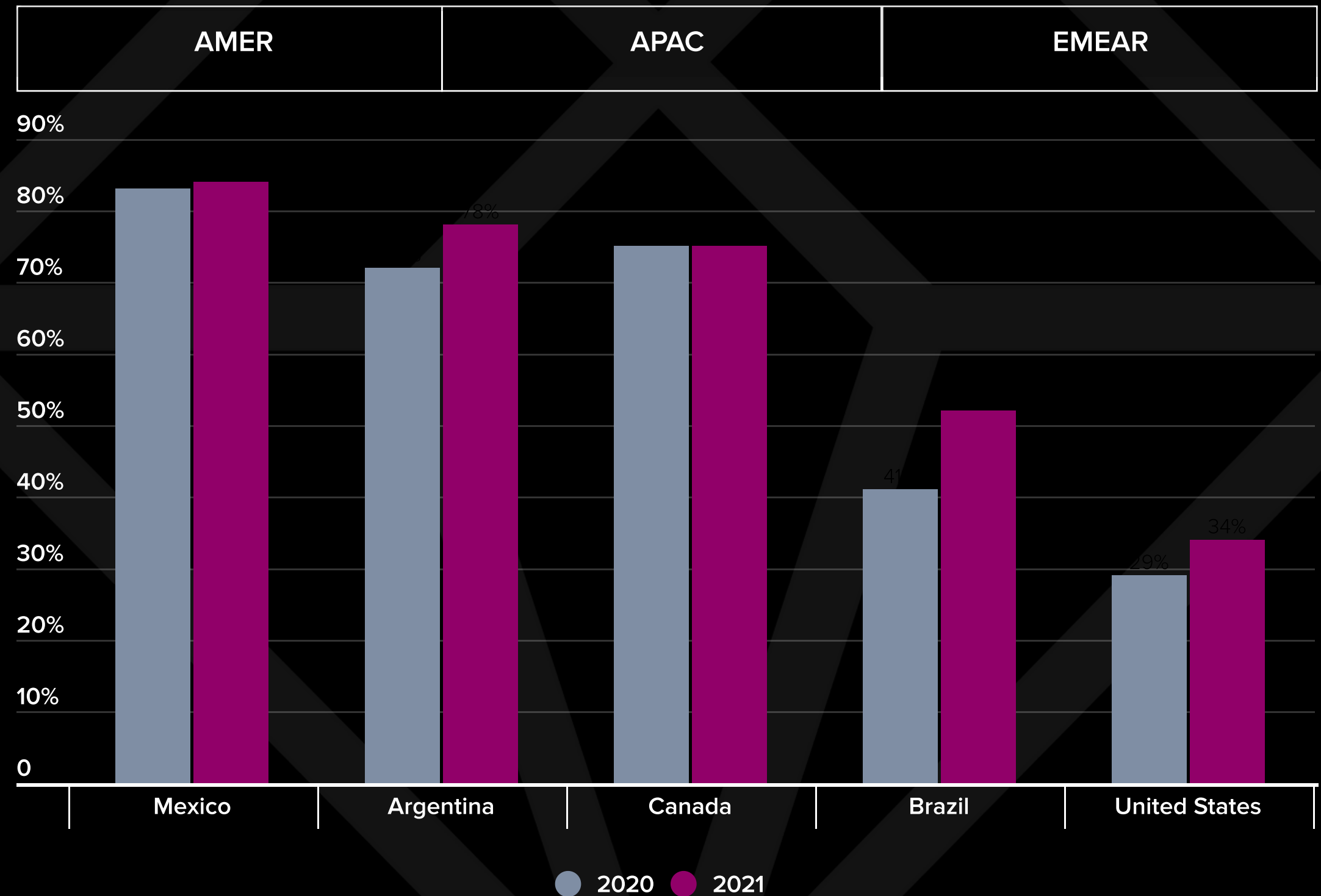
Overseas Brands Grow International Footprint, Growing Market Share by 11% in Some Regions

APAC-HQ'd shopping apps have grown international downloads, shifting market share to non-native-based brands in many regions. Across AMER, overseas publishers grew in share of downloads. In the US, however, the mobile shopping market continued to be dominated by US-based brands (66% share), with only 34% from non-domestic brands.

Still, US-based apps lost 5% share of downloads to overseas publishers, driven by China, Canada, Australia, and Japan. In Brazil, Overseas-HQ'd apps dominated 52% of all shopping app downloads in 2021, an increase in share of 11% YoY.

Retail brands are losing share to non-local companies, most notably in regions across AMER as shoppers turn to overseas-HQ'd Shopping apps. Evaluate which of the top companies are driving shifts in market share.

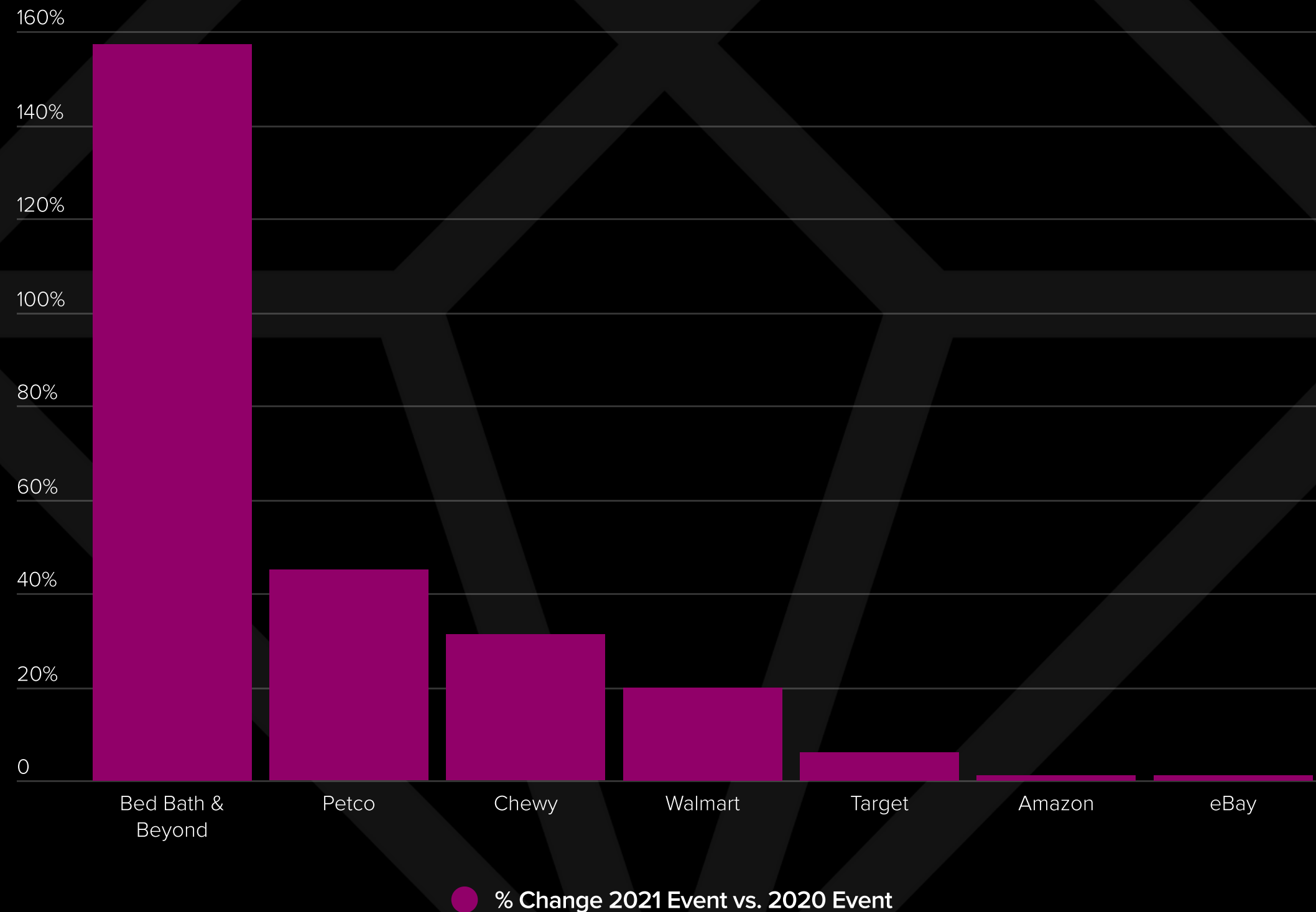
Going Global: Share of Shopping Downloads by Overseas-HQ'd Publishers



Source: App Annie Intelligence

Note: Downloads across iOS and Google Play; China is iOS only

Growth in Sessions Spent in Shopping Apps in the US
During "Prime Day" Deal Period



Source: App Annie Intelligence Note: Android Phones. Among select retailers that held a "Prime Day competitive savings event" in 2021. Data reflects the 2-day event period only, based on Amazon's official Prime Day event dates (6/21-6/22 in 2021 and 10/13-10/14 in 2020)

RETAIL

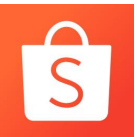
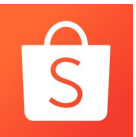
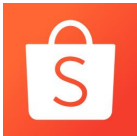
Competing "Amazon Prime Day" Events Spurred Sessions Growth by 20% for Walmart & Smaller Savvy Players

While Prime Day was started by Amazon, nearly all major retailers piggyback with rival events as they compete for share of wallet. This year, Amazon held Prime Day 2021 in June (6/21 - 6/22) vs the October event period that was held last year, and competitive retailers followed suit.

Walmart held their first "Prime Day" event in 2020 called the "Big Save Event", which ran parallel to Amazon Prime Day's 10/13 - 10/14 event. Because of its success, Walmart ran "Deals for Days" in 2021 alongside Prime Day and saw 20% more sessions than the year before. Similarly, Target announced Target Deal Days, and Chewy hosted their Blue Box Event sale.

Dive into our creative data to see how other players promote on mobile surrounding high traffic retail holidays.

2021 Rankings by Market | Shopping

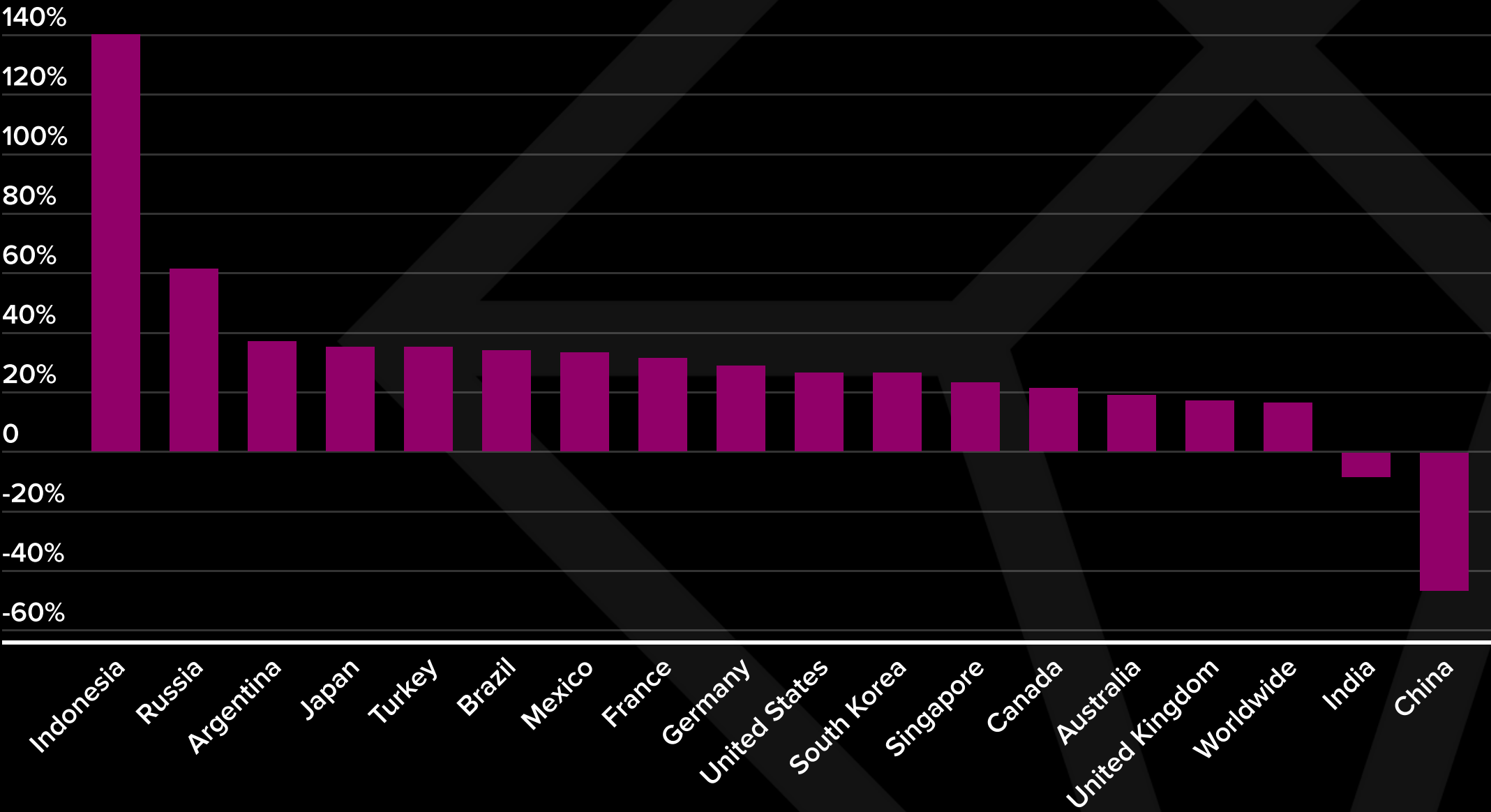
	AMER - Breakout Downloads								
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	 Meesho	 Blush Mark	 Nike	 Shopee	 SHEIN	 GELT	 Shopee	 Shopee	 AliExpress
2	 Shopee	 SHEIN	 Triangle	 Nike	 Facily Social Commerce	 Alibaba.com	 Alibaba.com	 Paris app	 Alibaba.com
3	 SHEIN	 Afterpay	 Honey Smart Shopping Assistant	 hibobi-enrich baby's childhood	 Shopee	 Plus La Anónima	 AliExpress	 Fazil	 Fazil
4	 Alibaba.com	 Klarna	 Etsy	 Claro shop	 enjoei	 LootBoy	 SHEIN	 Lider	 RipleyPago
5	 A	 a	 PETROCANADA	 Alibaba.com	 AliExpress	 BOX	 Trendier — Sell n' buy	 Snid35: Miles de	 B

Learn More: [Uncover the Top Shopping Apps by Change in Yearly Downloads](#)

Source: App Annie Intelligence. Note: Combined iOS and Google Play; China is iOS only; MAU is across iPhones and Android phones; Market-level rankings; Breakout defined as Year-over-Year growth in Downloads or average MAU.

Video Streaming

Growth in Total Hours Spent Streaming
2021 vs 2019



Total Hours Spent Watching Video Streaming Apps Grew 16% Worldwide Since Pre-Pandemic Levels

Most countries in Asia saw growth in time spent among the top 20 video streaming apps, continuing the momentum first seen during the initial stage of the global pandemic. Conversely, in China, video streaming apps saw substantial declines as consumers increasingly gravitated towards short-form video apps; *TikTok* and *Kwai* saw total time spent in app grow by 205% and 225% since 2019, respectively.

Indonesia and Russia saw the highest increases in total hours spent across their video streaming apps in 2021, with *India's MX Player* being the primary driver of growth.

Growth in Total Hours Spent on Short-Form Streaming
Apps in China, 2021 vs 2019



Source: App Annie Intelligence
Note: Time spent on Android phones among top 20 video streaming apps by time spent; worldwide excludes China

Despite access to bigger screens, consumers are still watching content on mobile. Competition is heating up in the space and exclusive content is a way of drawing in new viewers. Keep track of the rapidly changing industry in App Annie.

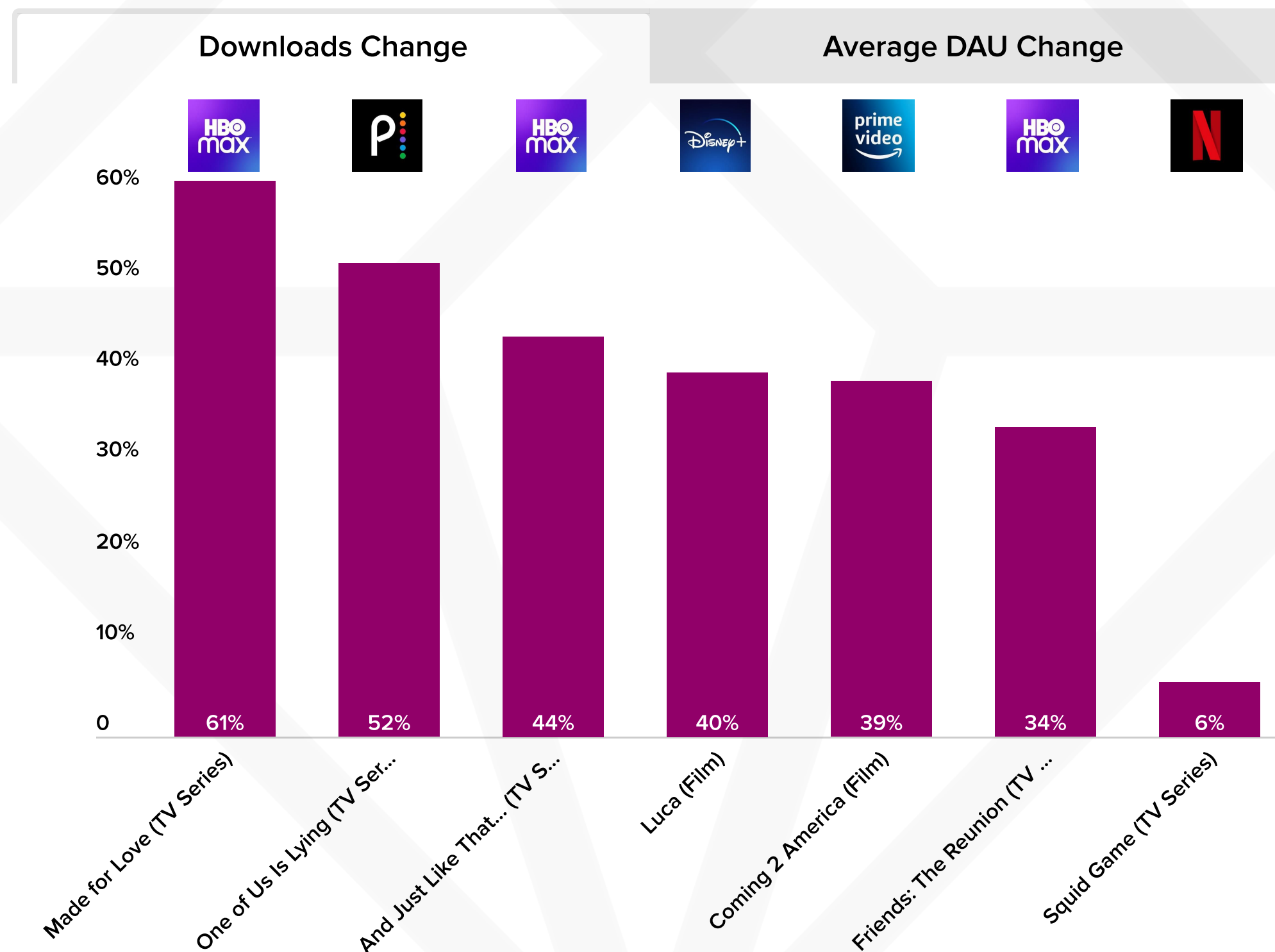
Exclusive Content Releases Drive Spikes in Video Streaming App Downloads Amidst Increased Competition in 2021

As more people were forced indoors due to COVID-19 and continuing to remain at home throughout 2021, demand for video streaming apps surged. To remain competitive, providers leveraged exclusive content releases to capture market share.

The launch of Made for Love (TV Series) coincided with a 61% increase in downloads of the HBO Max app, while Squid Game's release in September 2021 saw a 6% boost for Netflix app downloads.

The demand among viewers for exclusive content is stronger than ever. Knowing what original content resonates with the target audience is crucial to staying ahead in an increasingly crowded space. [Compare US-based video streaming app downloads.](#)

Downloads and Active Users Growth for Select Exclusive Content Releases, United States 30 Days Prior to Release vs 30 Days After



Source: App Annie Intelligence

Note: Downloads across iOS, Google Play. MAU is across iPhones and Android phones
Average DAU represents the average Daily Active Users of an app

VIDEO STREAMING

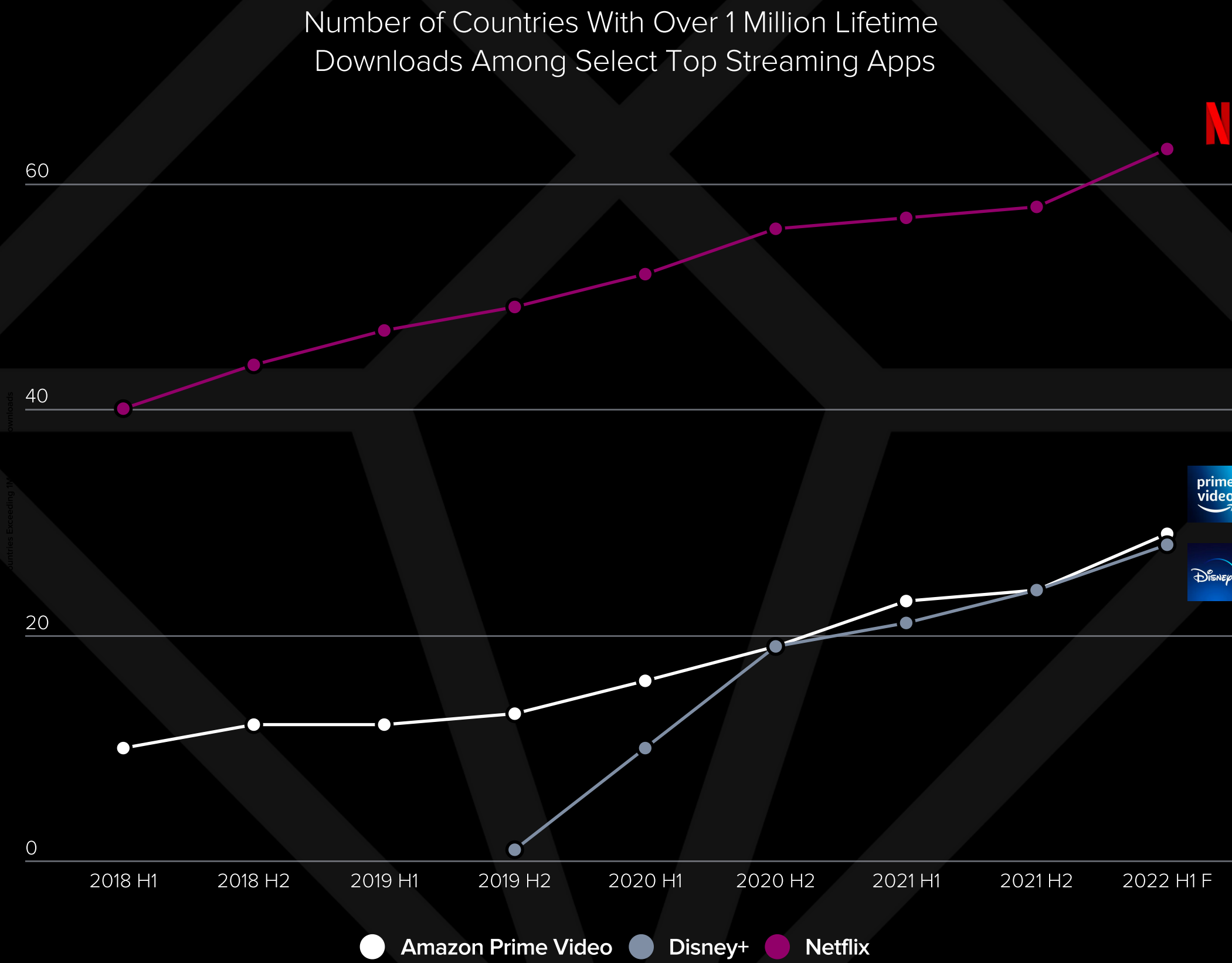
Global Expansion Heats Up: Netflix Set to Surpass 1 Million Downloads in Over 60 Countries in 2022

Netflix has the largest global footprint among video streaming platforms and a robust audience in each: with over 1 million local downloads in 60+ countries.

Disney+ rivals *Amazon Prime Video's* global footprint, despite launching 7 years later on mobile.

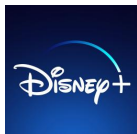
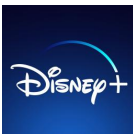
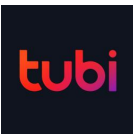
Exclusive content, strategically timed releases, and overseas expansion are fuelling growth in the video streaming sector — a mobile-first strategy is needed to succeed.

Track lifetime downloads and monitor the global strategies among top players in your competitive set.



Source: App Annie Intelligence
Note: Downloads across iOS, Google Play

2021 Rankings by Market | Video Streaming

	AMER - Downloads								
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	 YouTube	 YouTube	 YouTube	 Disney+	 Netflix	 Disney+	 Disney+	 Disney+	 Disney+
2	 Netflix	 Netflix	 Amazon Prime Video	 Netflix	 Disney+	 Netflix	 Netflix	 Netflix	 Netflix
3	 Amazon Prime Video	 HBO Max	 Disney+	 HBO Max	 Pluto.tv	 Pluto.tv	 Pluto.tv	 Amazon Prime Video	 BOOYAH Live
4	 Disney+	 Disney+	 Netflix	 Tubi TV	 Amazon Prime Video	 Amazon Prime Video	 Amazon Prime Video	 HBO Max	 Pluto.tv
5	 YouTube Kids	 Hulu	 Twitch	 Pluto.tv	 Globo Play	 Twitch	 VIX	 Twitch	 Amazon Prime Video

Learn More: [Uncover the Top Video Streaming Apps by Downloads](#)

Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings. Video Streaming Apps custom categorized from the Entertainment, Photo & Video, News, Sports, News & Magazines and Video Editors & Players categories across iOS and Google Play

Food & Drink

From grocery, alcohol, and convenience to morning coffee runs, we're focused on making Uber Eats reliable, flexible and easy to use. Trusted data points from sources like App Annie help us to measure that success and refine our mobile strategy over time.

Pierre Dimitri Gore-Coty
SVP of Delivery
Uber

The Uber logo, consisting of the word "Uber" in a white sans-serif font, centered within a solid black square.

New Record: Sessions in Food & Drink Apps Reached 62 Billion

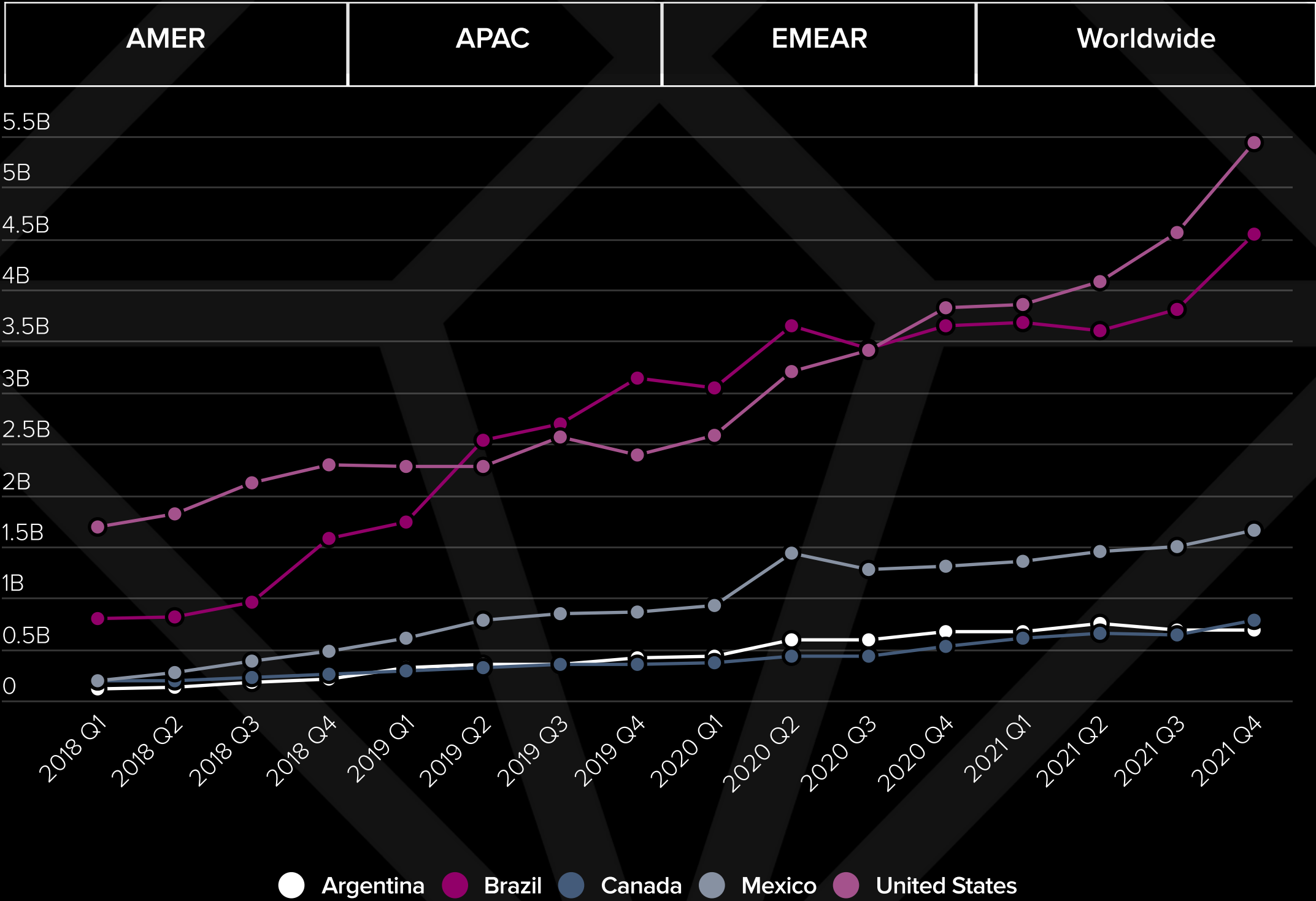
The pandemic expedited usage of Food & Drink apps across the world. Despite concerns for a slowdown following regional re-openings, an increase in both supply and in demand pushed market growth further than ever. Globally, users spent 49% more sessions YoY in 2021 in Food & Drink apps.

After facing a decline in user sessions in India in Q2 2020 due to logistics issues arising from the pandemic, India bounced back to 12.1 billion sessions in Q4 2021.

Several regions drove high growth in Q4, including: The US (42% YoY), Russia (154% YoY), Turkey (75% YoY), and Indonesia — who saw over 9x growth YoY — surpassing user sessions in China.

Fostered by new players, partnerships, delivery, quick-fulfilment, user demand continued to increase throughout the year, with users spending more sessions than ever in Q4. Dive deeper in App Annie's [market level report](#) to see how downloads and sessions stack up.

Quarterly Sessions Spent in Food & Drink Apps Growth Over Time



Source: App Annie Intelligence
Note: Android Phones

Top Keywords by iOS Search Volume
Among Food & Drinks Apps

< Brazil >

restaurantes
comida
supermercado
ifood subway
food mcdonalds
happy delivery
burger king

FOOD DELIVERY

QSR & FAST-CASUAL

GENERIC KEYWORDS

DISCOVERY / REWARDS / RECIPES

Source: App Annie Intelligence Note: Top 10 keywords searched on iPhone within each region,
ranked by average est. keyword search volume in 2021

FOOD & DRINK

Established Markets: QSR Terms & Delivery Dominated the Top Searches in 2021

In established markets, users tend to search for branded keywords. In emerging markets for mobile Food & Drink, brand awareness remains an opportunity.

For many categories on mobile, branded keywords top the charts by app store search traffic. In this case, what users wanted, they searched for. In established markets such as the US, UK, and France, branded food delivery keywords ranked among the top terms, followed by QSR brand names. Top searches in Indonesia, one of the fastest growing markets for food and drink apps, were almost exclusively QSR (8 of 10).

Generic keyword opportunities within ASO surfaced in many other markets — in 2021, user searches for "food", "delivery" and "coffee" were on the rise. "Food" was a top 5 keyword in several regions, ranking as the #1 searched keyword in Canada, Mexico, and Australia, and at #2 in Turkey and #3 in Brazil.

Use the Keyword Search report to understand where competitors stack up for the top organic keywords in each country.

International Launches & Recent Acquisitions Drive Rapid Growth for 10-Minute Delivery

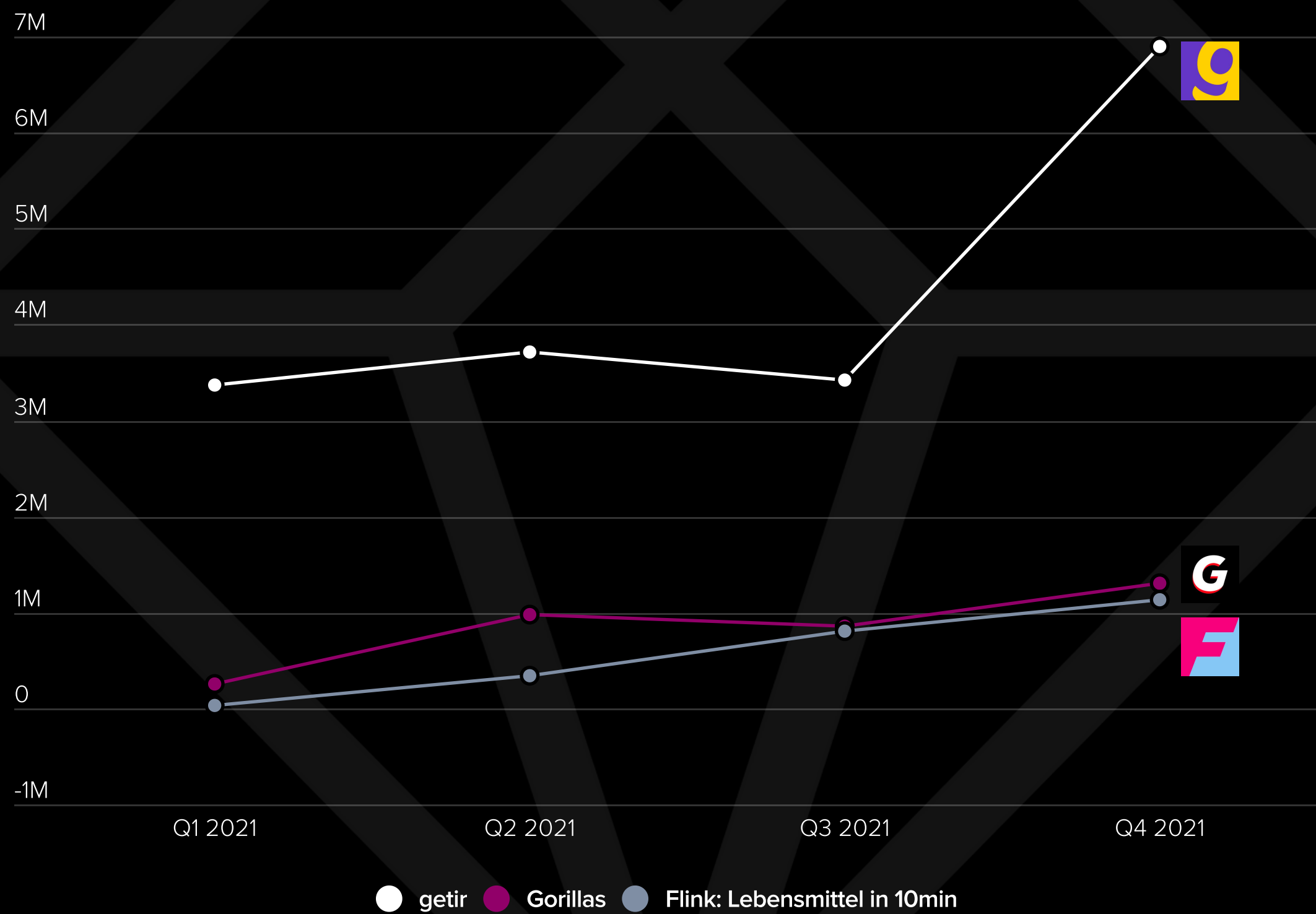
In 2020, consumers wanted delivery. In 2021, consumers wanted delivery...now. Hyper-fast grocery delivery apps grew at speeds faster than their delivery times.

Turkish delivery company Getir hit nearly 7 million downloads worldwide in Q4 2021, up 105% from Q1 - driven by international expansion. After making their first acquisition in July to expand into Spain and Italy, Getir acquired UK-based rival Weezy in November just weeks before starting operations in the US — wrapping up 2021 with services in Chicago, NYC, and Boston.

DE-based Gorillas and US-based Flink are among several rapidly growing players both reaching over 1 million global downloads in Q4.

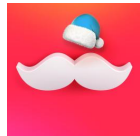
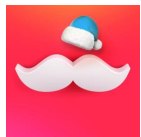
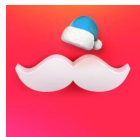
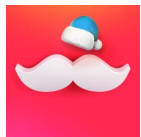
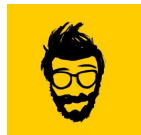
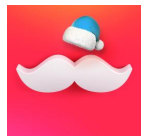
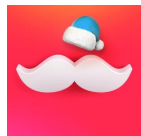
Dive into emerging trends and players even further. Use App Annie to help uncover new and emerging competitors driving global growth within rapid delivery.

Trend Spotlight: Rapid Delivery Apps See Strong Growth in Quarterly Downloads Worldwide



Source: App Annie Intelligence Note: iOS and Google Play combined; Select top delivery apps marketed as having "10-minute delivery"

2021 Rankings by Market | Food & Drink

	AMER - Downloads								
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	 UberEATS	 DoorDash	 Tim Hortons	 Rappi	 iFood Delivery de Comida	 PedidosYa	 iFood Colombia	 PedidosYa	 PedidosYa
2	 Zomato	 McDonald's	 McDonalds Canada	 DiDi Food	 McDonald's App	 McDonald's App	 Rappi	 Rappi	 Rappi
3	 McDonald's App	 UberEATS	 UberEATS	 UberEATS	 Zé Delivery de Bebidas	 Burger King Argentina	 OLIO	 UberEATS	 Bees U
4	 foodpanda - food delivery	 Yelp	 DoorDash	 Dominos MX	 Rappi	 Rappi	 McDonald's App	 Papa Johns Pizza Chile	 Wabi Casa
5	 DoorDash	 Grubhub	 SkipTheDishes	 Burger King Mexico Nuevo	 UberEATS	 Wabi Casa	 DiDi Food	 McDonald's App	 McDonald's App

Learn More: [Uncover the Top Food & Drink Apps by Yearly Downloads](#)

Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

Health & Fitness

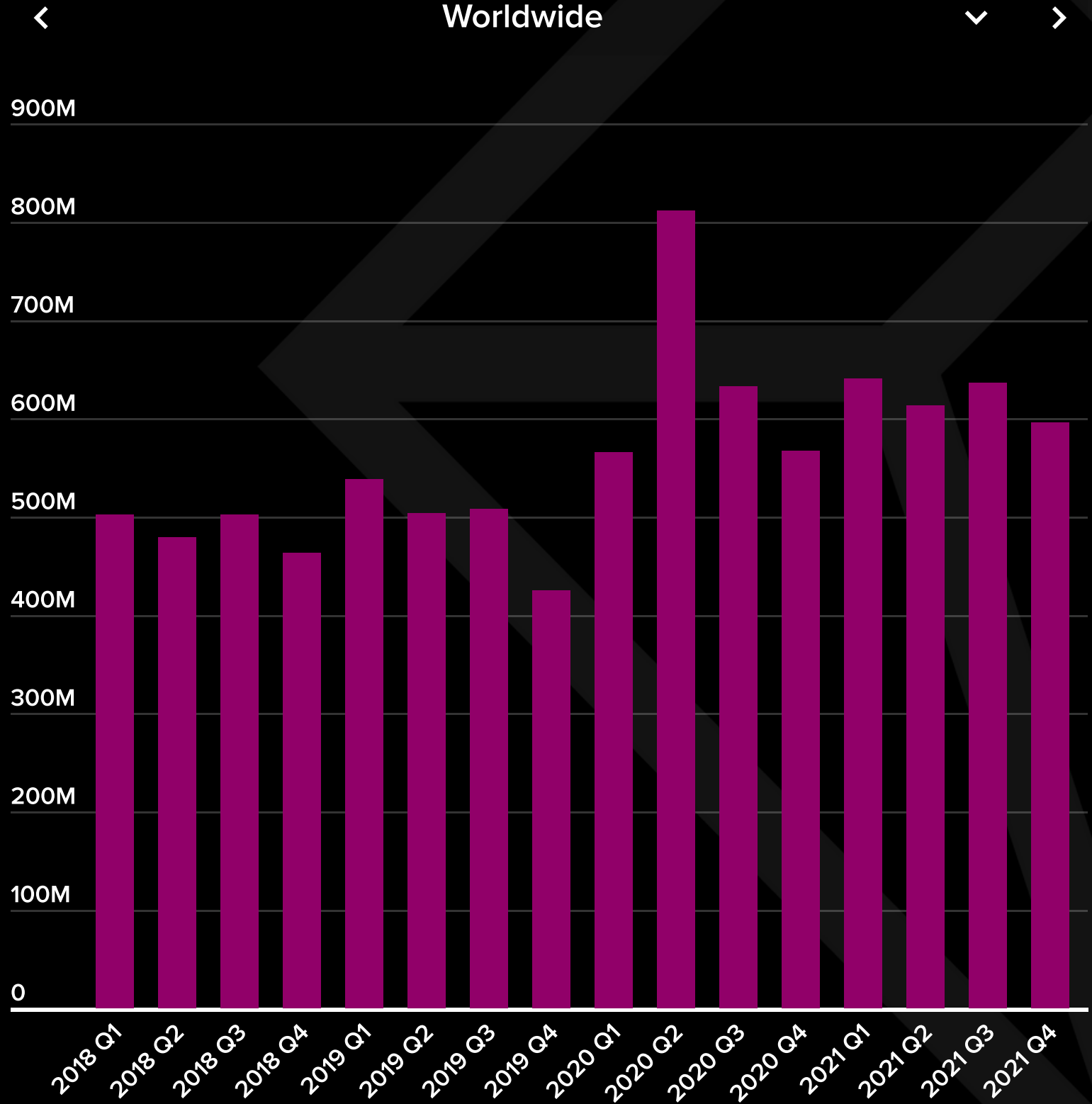
In 2021, mobile apps became more integrated in our daily lives as people aimed to enrich their lives while staying at home amidst Covid-19. We believe this trend will continue as mobile apps become more tailored to meet individual consumer needs. In the healthcare domain, we believe that more people will be using smartphones, tablets, and wearable devices even more for health management, diagnosis, and treatment.

Takuma Ishibashi
Executive Director,
Eisai Co., Ltd..



Quarterly Health and Fitness App
Downloads by Country

HEALTH & FITNESS



Global Health & Fitness App Downloads Surpassed Pre-Covid Levels in 2021 as Health & Wellbeing Are Top of Mind 2 Years Into the Pandemic

Worldwide downloads of Health and Fitness apps remained high despite seeing a slight softening from a pandemic-induced high in 2020 for most countries. While China and the United States were two markets that did not see their 2021 download volumes surpass pre-pandemic levels in 2018, there were still areas of download growth. Despite this, meditation, fitness and mental health apps saw sustained popularity YoY.

Mobile is a pulse check of consumer sentiment. Health, fitness and mental wellbeing are top of mind for consumers. Monitor market shifts in App Annie.

Source: App Annie Intelligence

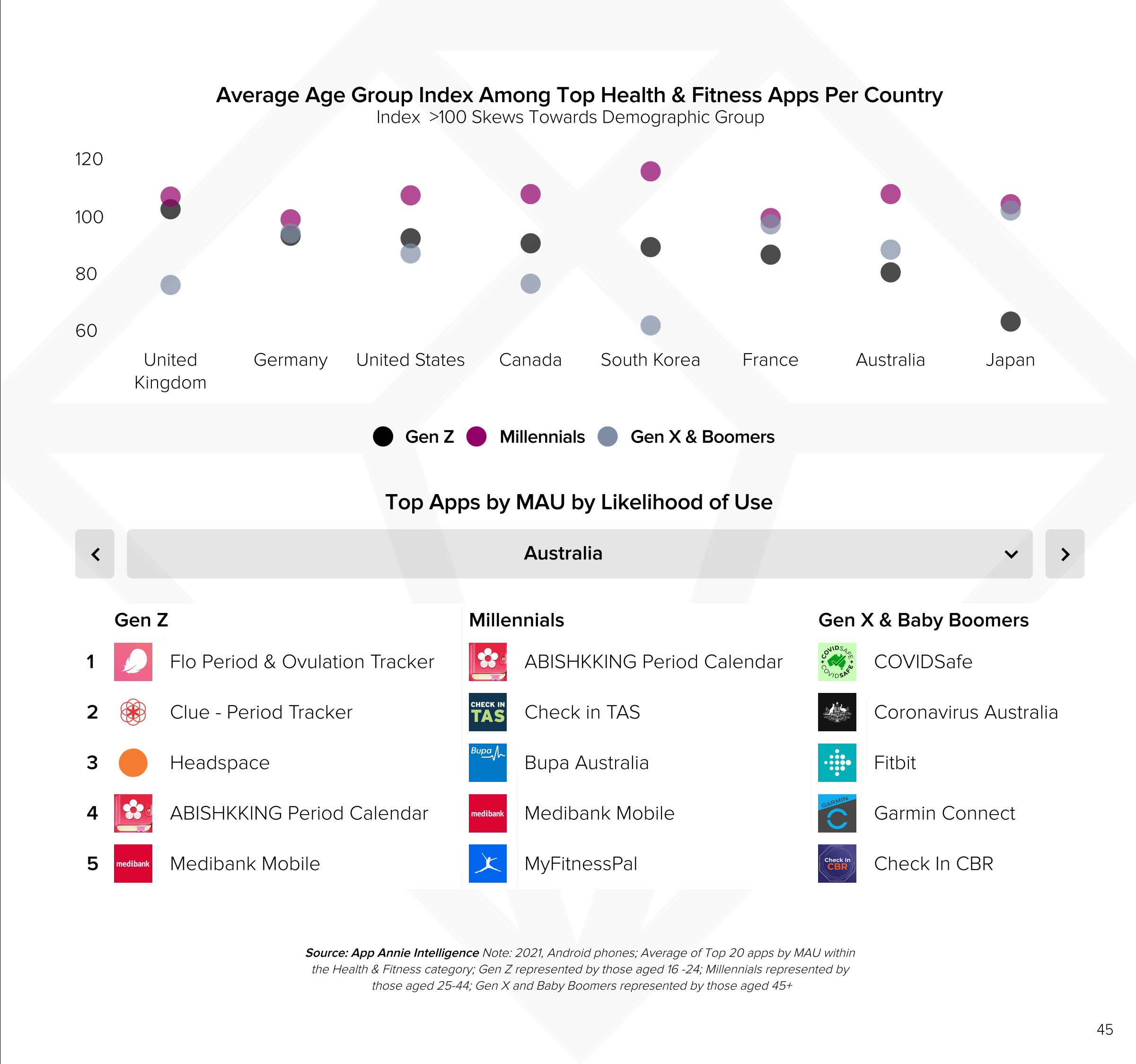
Note: Downloads across iOS, Google Play; China is iOS only

Walking & Fitness Apps are Most Popular Among Older Groups, While Meditation Apps More Likely Used Among Gen Z

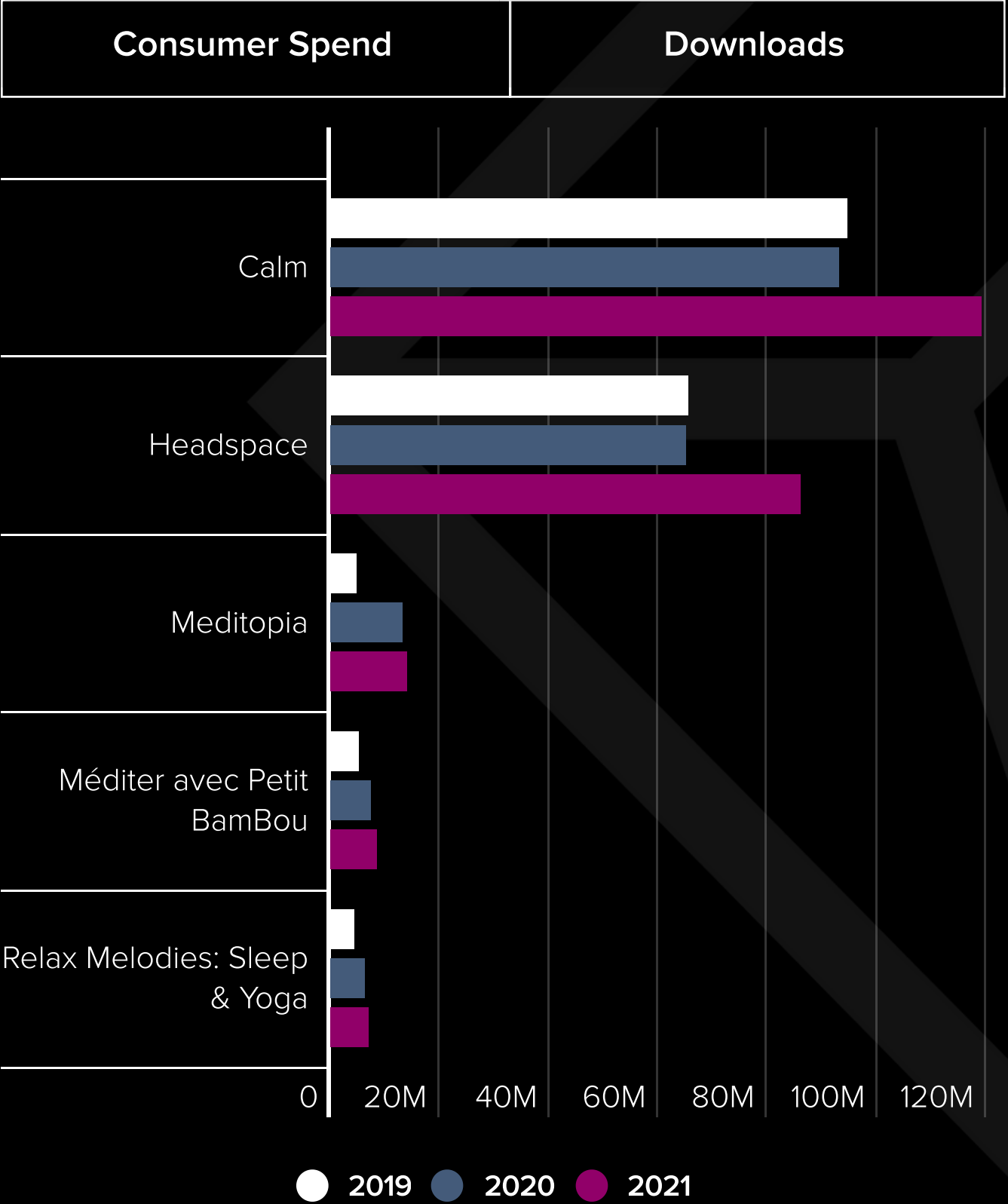
The most differences in generational use of Health & Fitness apps emerged in South Korea, with the least in Germany.

Gen Z users of Health & Fitness apps tend to be more comfortable using apps that center around knowledge empowerment and privacy, such as feminine health apps; they are also more willing to try mental-health focused apps such as *Headspace*.

This contrasts with Gen X & Baby Boomers, where pedometer, walking and hiking apps tend to be more popular. [Compare demographics data across age groups.](#)



Consumer Spend & Downloads Among Top Most Downloaded Meditation Apps Worldwide



Source: App Annie Intelligence
Note: Revenue and Downloads across iOS, Google Play

HEALTH & FITNESS

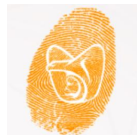
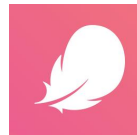
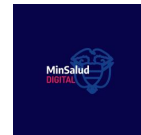
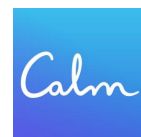
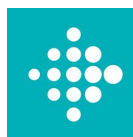
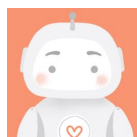
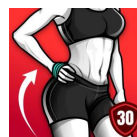
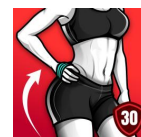
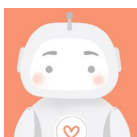
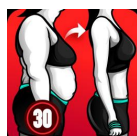
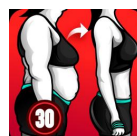
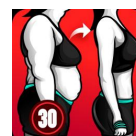
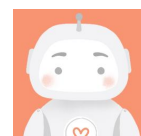
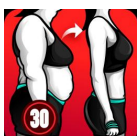
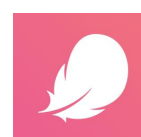
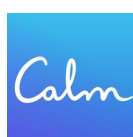
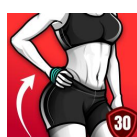
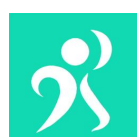
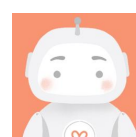
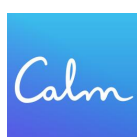
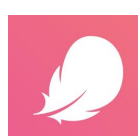
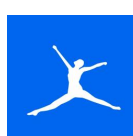
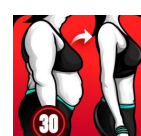
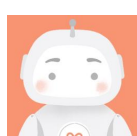
The Top 5 Downloaded Meditation Apps Saw 27% Growth YoY in Consumer Spend Following Record Downloads in 2020

Meditation apps are becoming a fast-growing subcategory within Health and Fitness apps, accelerated by the global pandemic at the start of 2020 that has since forced many to remain indoors as lockdowns become the sudden norm.

Calm remains the most downloaded meditation app both in 2020 and 2021 worldwide, with Headspace and Meditopia rounding out the top 3. Although downloads softened in 2021, both Calm and Headspace saw total time spent in their Google Play apps increase YoY by 12% and 15%, respectively.

More time spent in app can translate to higher revenue despite declines in app downloads. Compare time spent among meditation apps to see how it correlates with revenue.

2021 Rankings by Market | Health & Fitness

AMER - Downloads									
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	 PeduliLindungi	 Planet Fitness	 AllTrails	 Imss Digital	 Flo Period & Ovulation Tracker	 vacunatePBA	 Coronapp-Colombia	 Fitia - Nutrición Inteligente	 SIS: Asegúrate e Infórmate
2	 Home Workout - No Equipments	 Calm	 Fitbit	 Yana	 Workout for Women: Fit at Home	 Blood Pressure INFO	 Workout for Women: Fit at Home	 Betterfly	 Yana
3	 Mi Fit	 MyFitnessPal	 COVID Alert	 Lose Weight App for Women	 Lose Weight App for Women	 Lose Weight App for Women	 Yana	 Muscle Booster Workout Tracker	 Lose Weight App for Women
4	 Aarogya Setu	 Flo Period & Ovulation Tracker	 Calm	 Workout for Women: Fit at Home	 Hryfine	 Yana	 Home Workout - No Equipments	 Calm	 6 Pack Abs in 30 Days
5	 Flo Period & Ovulation Tracker	 Fitbit	 MyFitnessPal	 Home Workout - No Equipments	 Strava Running and Cycling	 Mi Fit	 Lose Weight App for Women	 Yana	 Fitia - Nutrición Inteligente

Learn More: [Uncover the Top Health & Fitness Apps by Yearly Downloads](#)

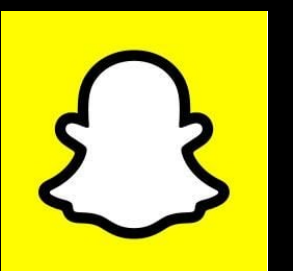
Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

Social

Mobile augmented reality experiences are changing the way we live, from how we communicate and have fun to how we shop for and discover products. With over 6 billion AR interactions on Snapchat every day, these aren't distant hopes; it's the new reality.

Thanks to the power of mobile, this cutting edge technology is at the fingertips of everyone with a cell phone right now, and as we look ahead to 2022, AR will continue to evolve and grow in utility for both consumers and businesses.

Chip Kanne
Head of North America Emerging Sales
Snap



SOCIAL

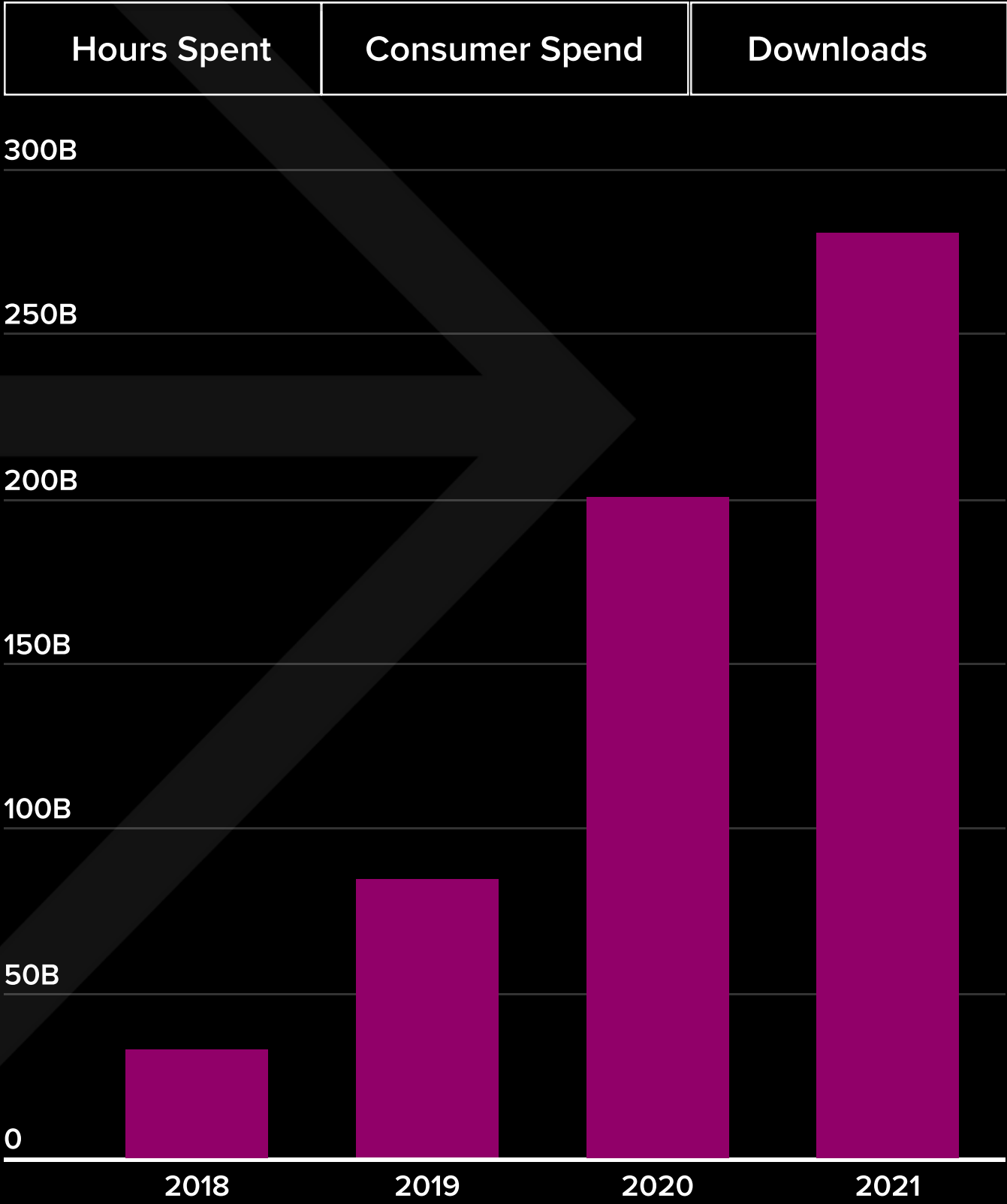
All Eyes on Live Streaming: Time Spent Grew 9x in 4 Years — Cultivating the Deepest Social Engagement

In 2021, time spent in the top 25 live streaming apps outpaced the social market overall year over year by a factor of 9 — YoY growth of 40% compared to all social apps at 5%.

Live streaming apps are also driving consumer spend in Social apps as consumers 'tip' their favorite content creators — with global consumer spend in the top 25 live streaming apps in 2021 growing 6.5x from 2018 and 55% YoY.

Social apps are the linchpin to connection in our mobile-first world. Live streaming apps are changing the game — providing opportunities for live shopping, content creator compensation, creative empowerment and the rise of authenticity in social apps. Keep on top of the latest social trends in App Annie.

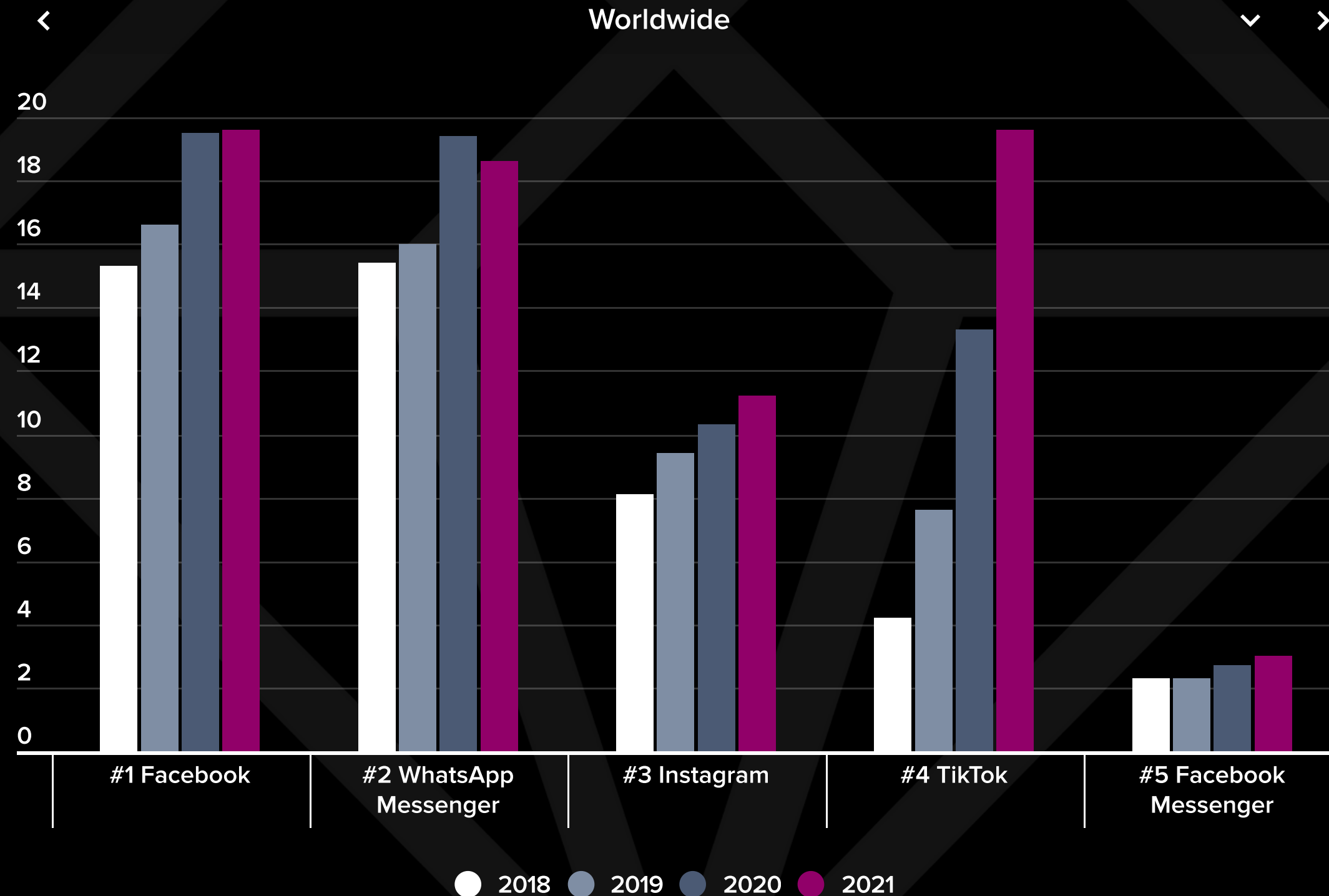
Global Growth of Live Streaming Apps
Among Top 25 Apps



Source: App Annie Intelligence Note: Downloads and Consumer Spend across iOS, Google Play; China is iOS only. Time spent is Android phones only

Average Monthly Hours Spent Per User in Top 5 Social Apps by Total Time

Worldwide



Source: App Annie Intelligence

Note: Android phones; Excluding business-management apps; Worldwide excluding China

SOCIAL

TikTok's Rocket Ship Growth: YoY Growth Rates As High As 75%

TikTok was a standout winner in per user engagement among the top 5 social apps commanding the most time spent in 2021.

It is notable that *TikTok* has seen the greatest in depth of engagement over 4 years and had a standout year in 2021, off the back of an already record-breaking 2020.

Meta properties in India benefited from the *TikTok* ban in 2021, with engagement deepening in both *Facebook* and *Instagram* by 15% and 35% respectively.

Explore evolving engagement patterns, including average time spent, demographic base and cross-app usage of top players to monitor how they are carving out mindshare in 2022 and beyond.

SOCIAL

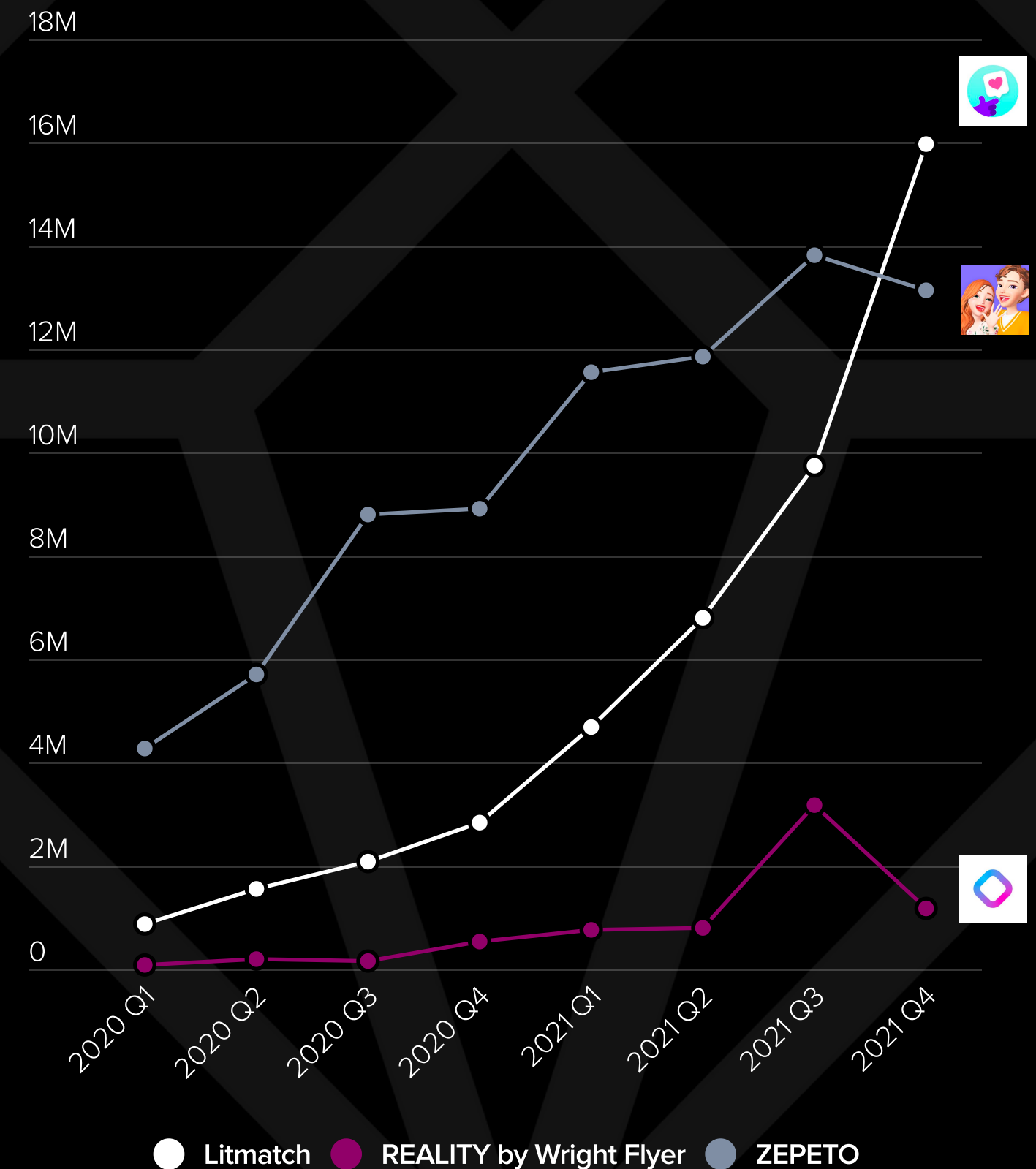
Emerging Trend: Avatar Apps Tap Into Increasing Demand for Metaverses: Social, User-Generated Content, Creativity

Demand for avatar social apps has grown amidst interest in metaverses in 2021, particularly H2.

Among the 3 select avatar social apps including *Litmatch*, *REALITY by Wright Flyer* and *ZEPETO*, downloads grew 160% YoY. *Litmatch* emphasizes matching with friends and using a simple avatar — highlighting the overlap of growing demand for avatar-based apps, even without a metaverse component — 2 converging trends. *Litmatch* saw downloads grow 405% YoY amidst surging demand.

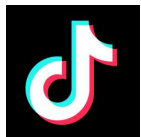
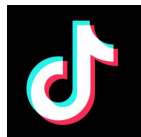
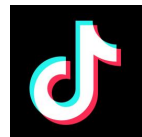
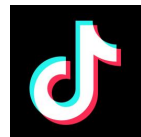
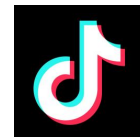
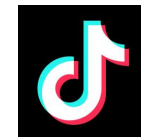
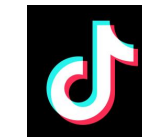
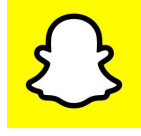
Creativity, creation and connection are at the core of growing interests in 2022. Mobile is the pulse of the cultural zeitgeist. Monitor rising stars to be among the first to capture shifts in these trends.

Spotlight on Avatar Social Apps: Worldwide Downloads



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

2021 Rankings by Market | Social

	AMER - Downloads								
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	 TikTok	 TikTok	 TikTok	 TikTok	 TikTok	 TikTok	 TikTok	 TikTok	 TikTok
2	 Instagram	 Facebook	 Instagram	 WhatsApp Messenger	 Instagram	 Instagram	 Facebook	 WhatsApp Messenger	 WhatsApp Messenger
3	 Facebook	 Instagram	 Facebook Messenger	 Facebook	 WhatsApp Messenger	 WhatsApp Messenger	 WhatsApp Messenger	 Instagram	 Facebook
4	 WhatsApp Messenger	 Facebook Messenger	 Facebook	 Instagram	 Facebook	 Facebook	 Instagram	 Telegram	 Instagram
5	 Telegram	 Snapchat	 WhatsApp Messenger	 Facebook Messenger	 Telegram	 Telegram	 Telegram	 Facebook	 Telegram

Learn More: [Uncover the Top Social Apps by Yearly Downloads](#)

Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings; Excluding dating apps

Travel

DiDi as a global leader in ride-hailing services, continues to grow rapidly in international markets in providing affordable ride-hailing and food delivery services in 2021. App Annie is an integral analytics platform for our marketing planning process. With its trusted mobile insights covering the app landscape we are better equipped to optimize our user acquisition, retention and engagement programs. It also helps us prioritize our roadmap and plan new markets entry.

Ajay Kaul
Global Performance Marketing Head
DiDi



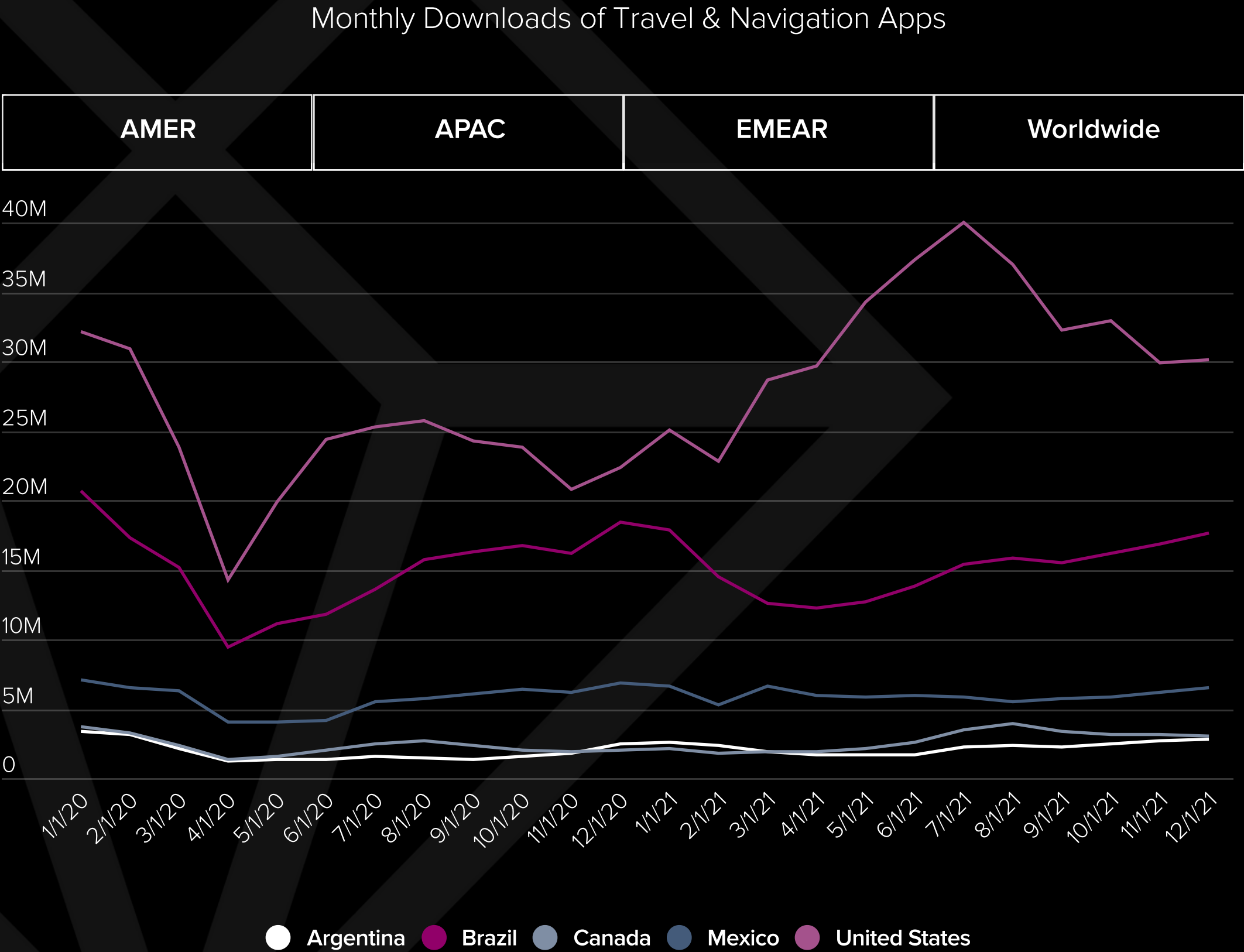
Downloads of Travel Apps Rebound by 20% in H2 driven by Sharp Increases from July – Dec 2021

The second half of 2021 showed positive trends for travel on mobile. H2 2021 downloads hit 1.95 billion worldwide, nearing pre-pandemic levels of 2.08 billion in H2 2019.

According to Tripit.com, 82% of Americans traveled in the Summer of 2021. During this time, the mobile travel market saw activity closely aligned to levels in 2019. In July 2021, travel apps reached 40 million downloads in the US, the highest since August 2019.

Several countries in Europe saw strong rebound rates in H2 2021 after loosening shelter-in-place restrictions and travel regulations. In fact, travel growth increased so steeply over the peak summer season that downloads in Germany, Turkey, and India were up 7%, 22%, and 5% compared to H2 2019, respectively.

Identify the top apps driving growth within the Travel & Navigation market.



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

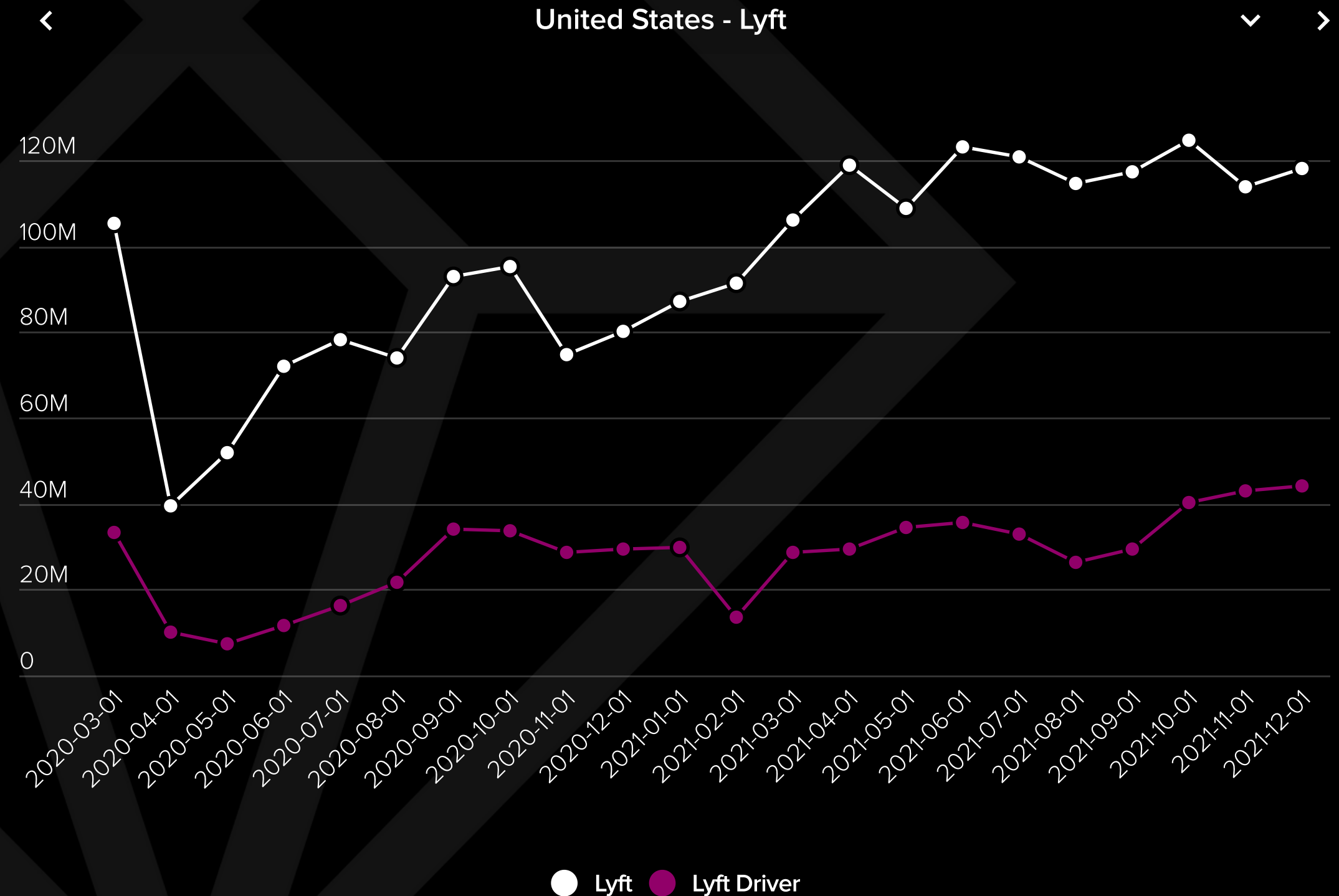
Drivers vs. Riders: Rideshare Supply & Demand Dynamics Differ Across Regions

Demand for rideshare apps has returned to normal levels, even higher in some regions. In the US, Uber riders spent nearly 212 million sessions in the app in December 2021.

Riders spend 3 sessions for every 1 driver session on Lyft in the US, showing demand for on-demand transport. In the UK, "supply" of available, active drivers was nearly equal with demand from riders in 2021.

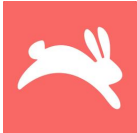
Marketplaces face the balancing act of supply and demand in real time. Monitor mobile data to keep track of market movement.

Monthly Sessions Spent in Select Rideshare Apps
"Driver" vs. "Rider" Apps on Android



Source: App Annie Intelligence
Note: Android Phones

2021 Rankings by Market | Travel

	AMER - Downloads								
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru
1	 Google Maps	 Google Maps	 Google Maps	 DiDi-Mobility	 Uber	 DiDi-Mobility	 inDriver	 Waze	 inDriver
2	 Uber	 Uber	 ArriveCAN	 Uber	 99Taxis	 Cabify	 DiDi-Mobility	 DiDi-Mobility	 DiDi-Mobility
3	 Waze	 Lyft	 Uber	 inDriver	 Waze	 Uber	 Waze	 Uber	 Waze
4	 Google Earth	 Waze	 Waze	 Google Maps	 inDriver	 Transit Directions by Moovit	 Picap	 inDriver	 Uber
5	 Booking.com	 Hopper	 Google Earth	 Airbnb	 Booking.com	 SUBE	 Uber	 Google Maps	 Taxibeat

Learn More: [Uncover the Top Travel Apps by Yearly Downloads](#)

Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

Dating

DATING

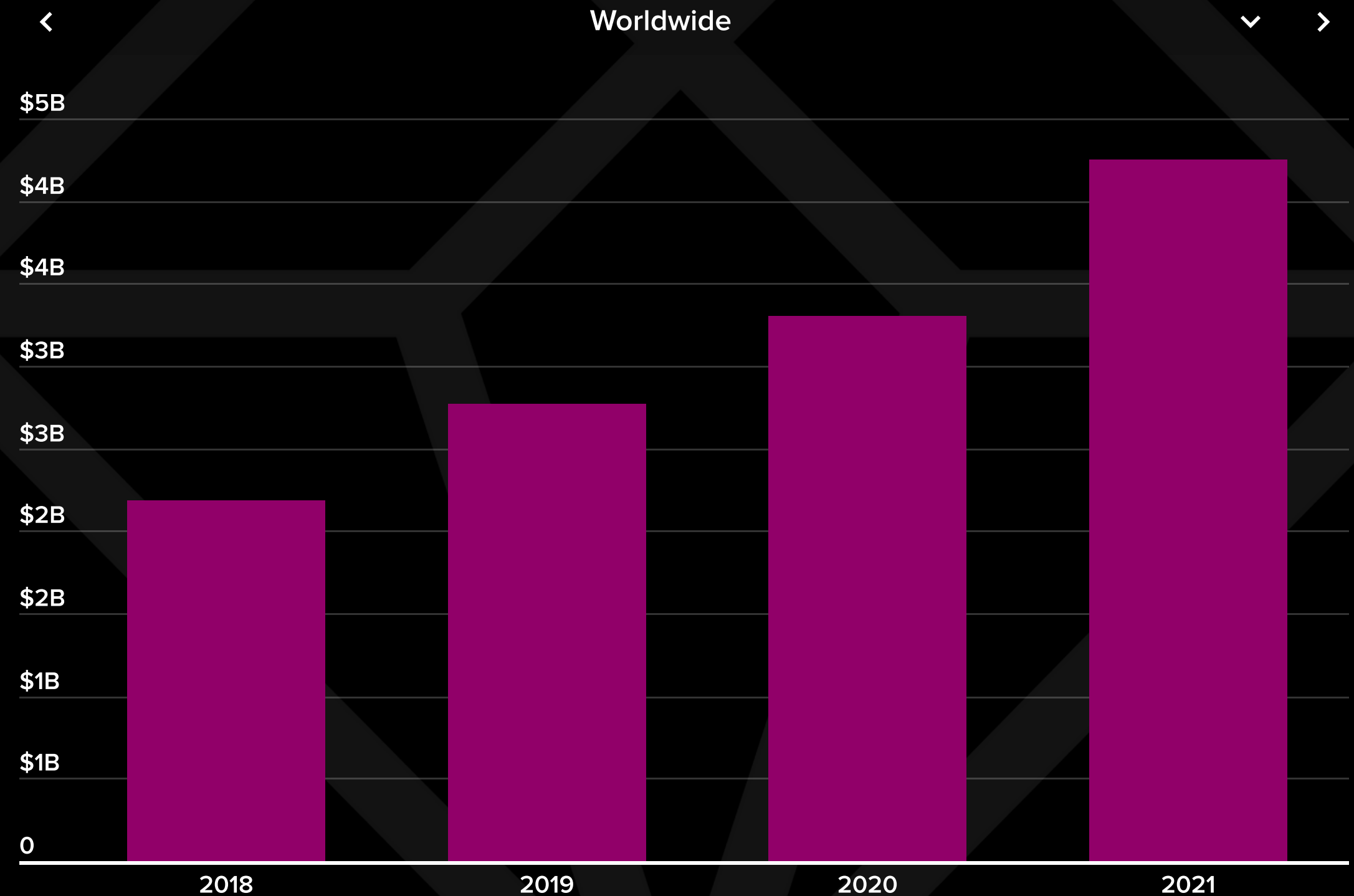
Worldwide Consumer Spend on Dating Apps Surged Past \$4B in 2021, Seeing an 95% Increase Since 2018 Despite the Pandemic

The unabated growth in consumer spend was primarily driven by the US, Japan, the UK and China, the four largest markets in 2021.

For the US, Germany, Indonesia, and Japan, consumer spend more than doubled since 2018. Despite its population size, India is one region that saw declining consumer spend on dating apps, although it is still up 18% since 2018. India is a unique market where, although users of dating apps may not be spending heavily, more than 75% of Indian daters have started going on hobby dates and more than 50% are thinking of dating as a way to explore. Mobile is perfectly positioned to capture budding demand in this sector.

It is important for dating app publishers to know their primary KPIs early, whether it is maximizing user acquisition or revenue. See how dating apps metrics changed year-over-year in App Annie.

Consumer Spend on Dating Apps by Country



Source: App Annie Intelligence
Note: Consumer Spend across iOS, Google Play

DATING

Users of Dating Apps With Generationally-Unique User Bases More Likely to Skew Male in Most Regions Except for Australia

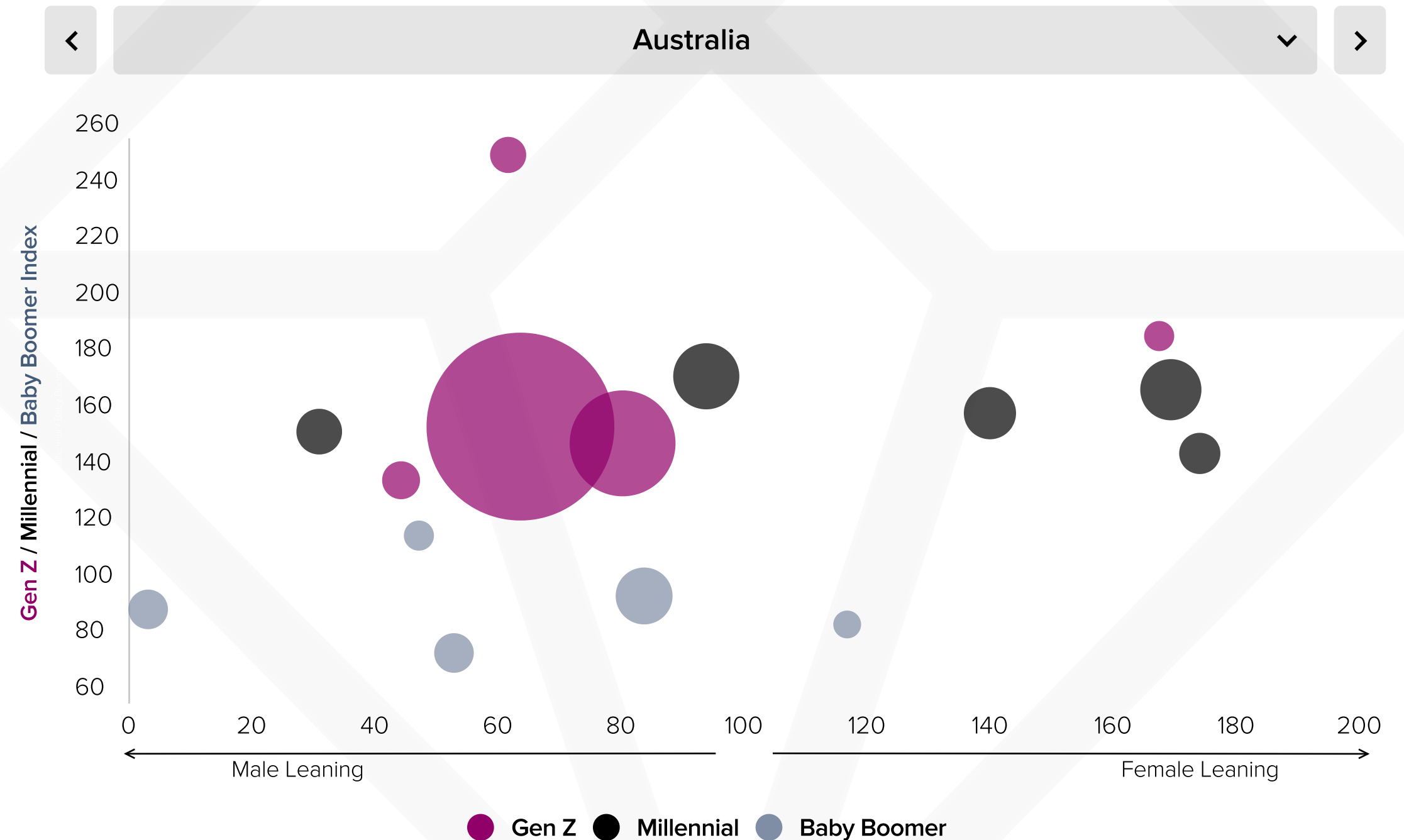
Taimi, Hily, and Tinder tend to be more popular among Gen Z in the US.

Gen X & Baby Boomers in North America and Australia tend to use 'mobile-forced' dating apps; among those, Zoosk and Match.com tend to be popular. SCRUFF, Bermuda, and Plenty of Fish Online Dating bucked the trend and saw popularity among Baby Boomers despite being mobile-first providers.

[Compare dating apps across countries in App Annie.](#)

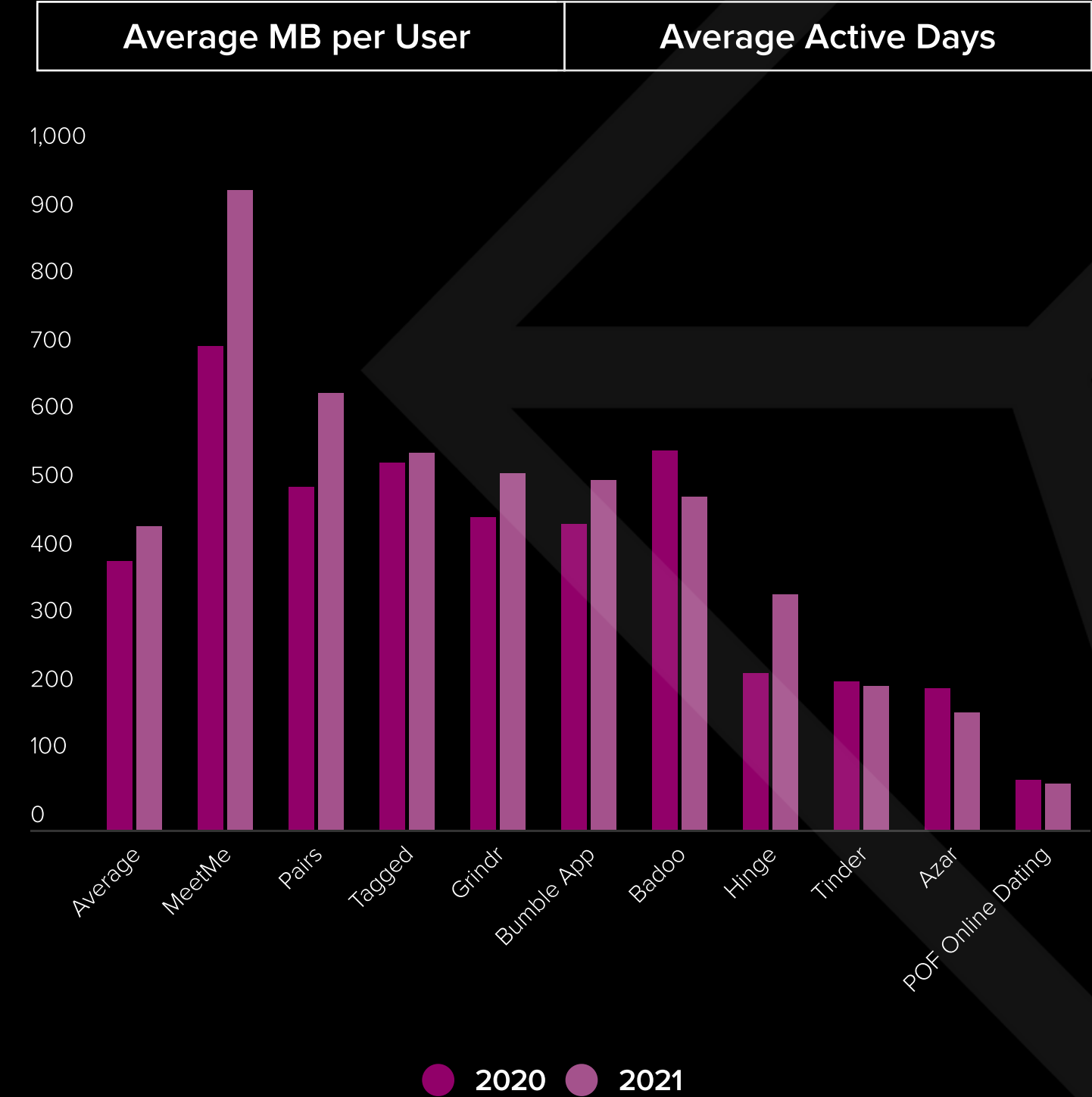
Top 5 Dating Apps Used as Ranked by Generational Index, 2021

Index >100 Skews Towards Demographic Group



Source: App Annie Intelligence Note: 2021, iPhone and Android phones; Gen Z represented by those aged 16 -24; Millennials represented by those aged 25-44; Gen X / Baby Boomers represented by those aged 45+; Top 5 Dating apps by Demographics Index (a measure of demographic cohort compared to the overall population) among top 25 Dating apps by average MAU overall; bubble size corresponds to average MAU of each demographic cohort

Monthly Avg Active Days vs Data Usage per User Among Top 10 Dating Apps Worldwide by Consumer Spend in 2021



Source: App Annie Intelligence Note: Android phones only; Average active days per month; "Average Sessions per User represents the average number of sessions per active user in a given month throughout year. Average Active Days represents the average days of use across all active users in a given month throughout year.

DATING

Among the Top 10 Dating Apps Worldwide by Consumer Spend, Most Apps Saw an Increase in Usage Two Years Into the Pandemic

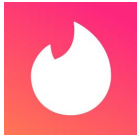
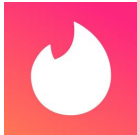
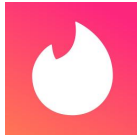
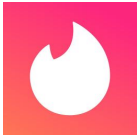
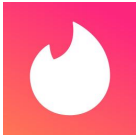
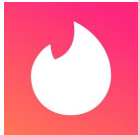
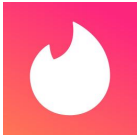
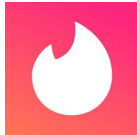
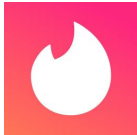
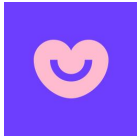
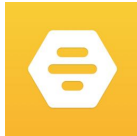
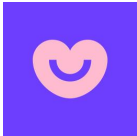
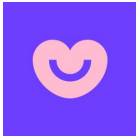
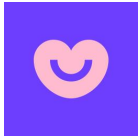
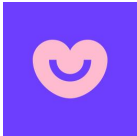
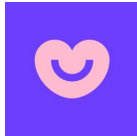
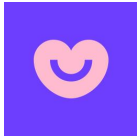
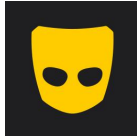
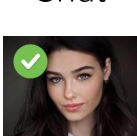
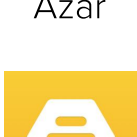
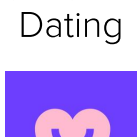
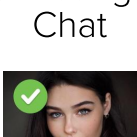
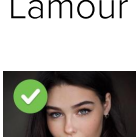
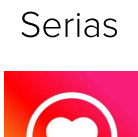
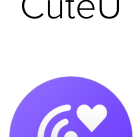
The top grossing dating apps also tended to have high average MB per user, signalling the rising popularity of using photos and videos to communicate. However, higher usage does not always correlate with higher consumer spend.

Tinder saw a slight decline in average MB per user but saw a record-breaking \$1.35B in consumer spend worldwide in 2021, maintaining its lead thanks to a 35% increase YoY.

Tinder's pricing model works well among its large user base, with its free-to-use model that charges users for extra features such as Boosts and Super Likes included in in-app subscriptions and purchases. It even dynamically adjusts its price based on the user's age - a proxy for demand.

Understanding each dating app's target audience and user behavior is crucial to its success. Explore engagement and monetization strategies in App Annie.

2021 Rankings by Market | Dating

	AMER - Downloads									
	Worldwide	United States	Canada	Mexico	Brazil	Argentina	Colombia	Chile	Peru	
1										
	Tinder	Tinder	Tinder	Tinder	Tinder	Tinder	Tinder	Tinder	Tinder	
2										
	Badoo	Bumble App	Bumble App	Badoo	Badoo	Badoo	Badoo	Badoo	Badoo	
3										
	CuteU	Hinge	Hinge	Bumble App	CuteU	happn	2Steps: Dating App & Chat	Grindr	MeetMe	
4										
	Azar	POF Online Dating	POF Online Dating	2Steps: Dating App & Chat	Lamour	Match.com - Relaciones Serias	SweetMeet	Lamour	CuteU	
5										
	Bumble App	MeetMe	Badoo	SweetMeet	SweetMeet	CuteU	CuteU	Grindr	2Steps: Dating App & Chat	

Learn More: [Uncover the Top Dating Apps by Yearly Downloads](#)

Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

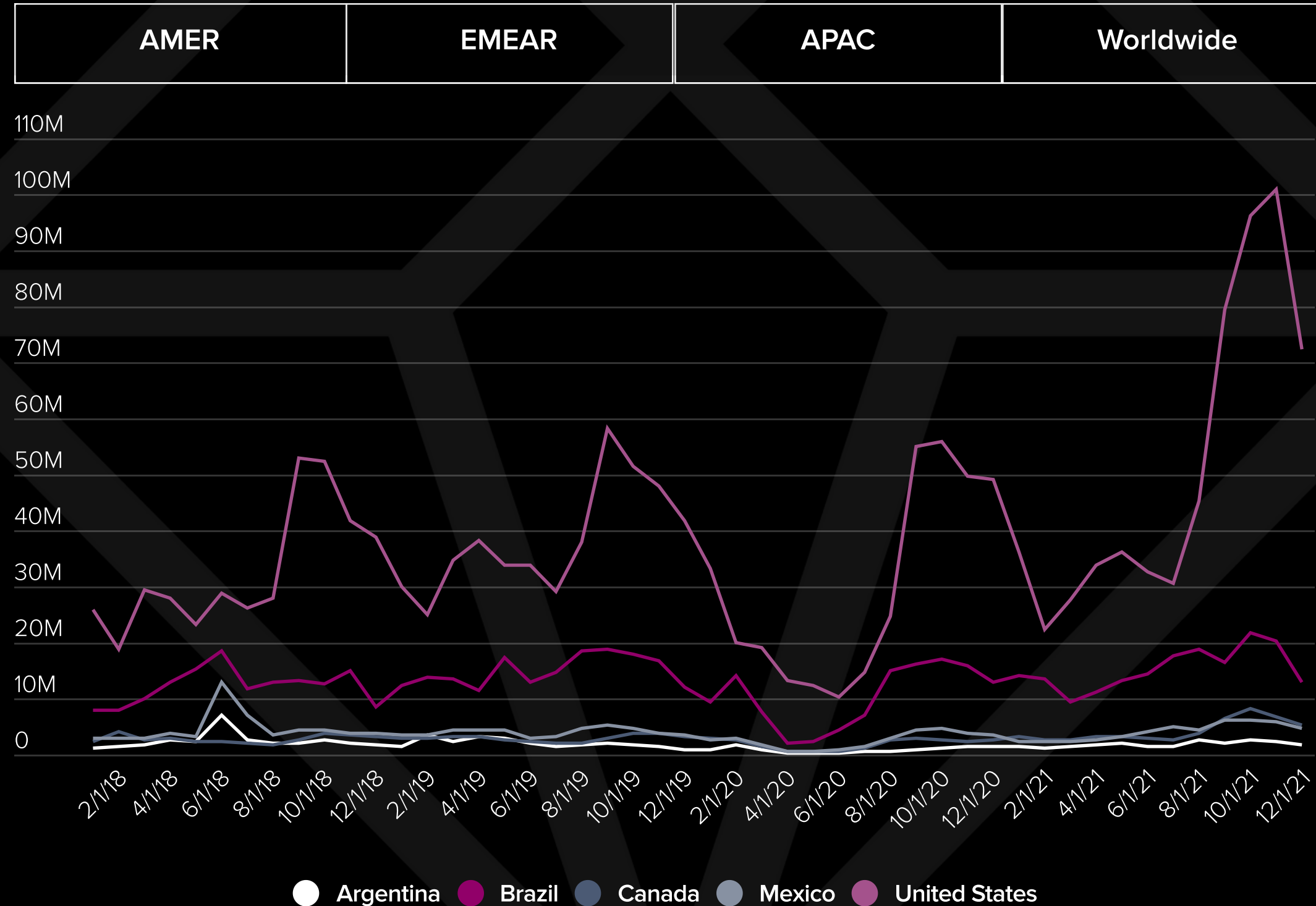
Other Industries Embracing Mobile

App Annie continues to be one of our most trusted tools and partners, helping us keep an eye on market trends and competitive benchmarks. Marketability from the game concept stage is a pivotal strategic pillar at Rovio, so we continue to work closely with App Annie on new features that help us in identifying market opportunities.

Luis de La Camara
VP Marketing
Rovio



Hours Spent in Sports Apps



Source: App Annie Intelligence
Note: Android Phones

SPORTS

Sports Rebounded in 2021: Tokyo Olympics & Return of Live Sports Drives Mobile Streaming

Hungry for new content, eyes returned to sports in 2021. The UEFA Euro Tournament, the return of NFL and fantasy football in the US and the Cricket World Cup in APAC were in high demand following a year with delays and limitations on live sports.

Globally time spent in sports apps rebounded 30% from 2020 back to 2019's pre-pandemic levels. Countries seeing the greatest rebounds included: Singapore (+125%), Canada (+125%), Russia (+120%), Argentina (+105%), Indonesia (+90%), Australia (+85%) and the US (+70%).

Monitor shifts in seasonality with App Annie.
Benchmark your app against market trends to see if you are in-line with, out-pacing or falling behind the market.

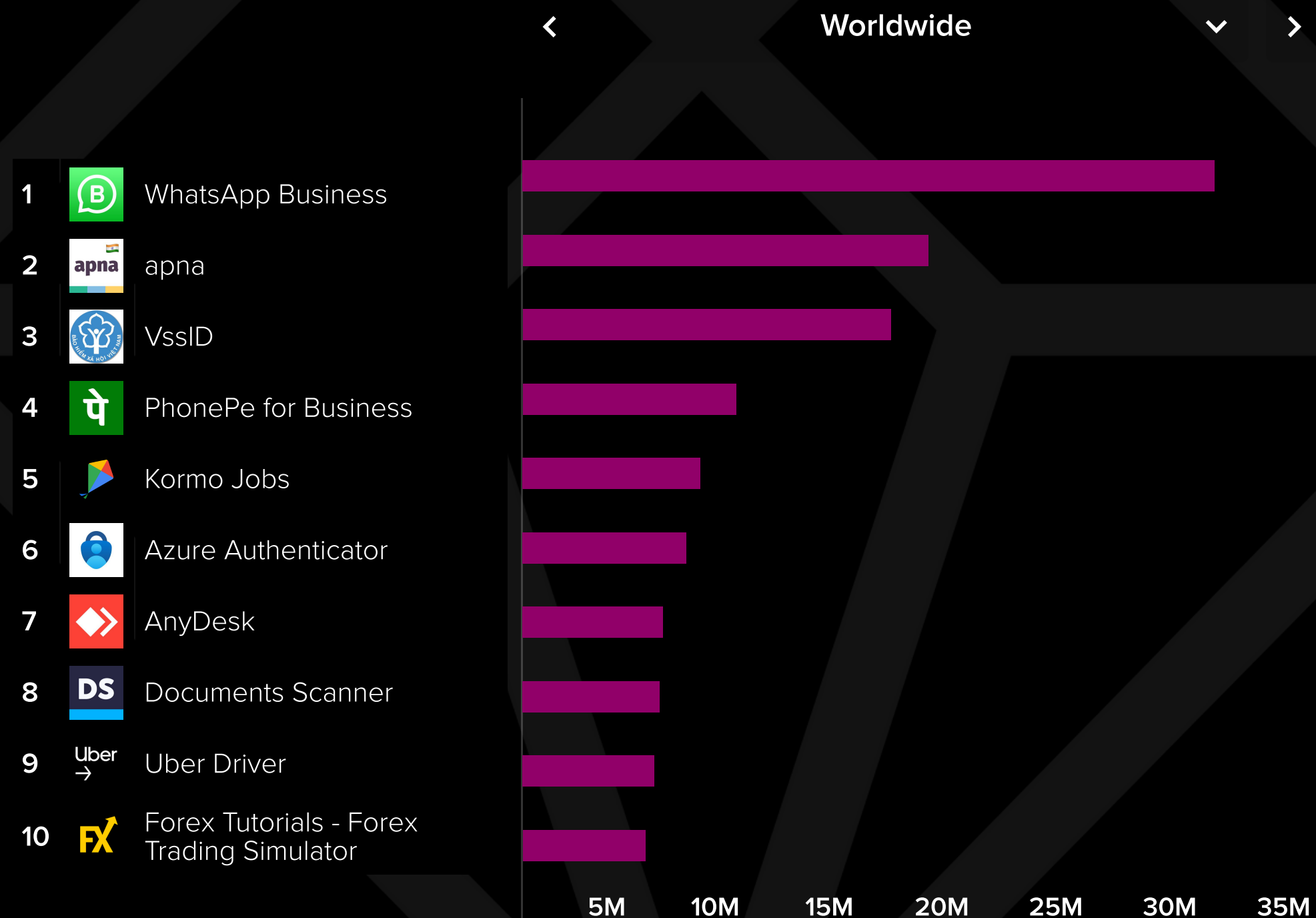
The Great Resignation? More Like The Mobile-Empowered Work Force

Job searching platforms like *Sonic* and *Apna* were the #1 breakout apps by downloads in the UK and India, respectively.

Choosing to work for themselves: Delivery driver apps like *DoorDash Driver* (#1 breakout business app in the US seeing 60% growth YoY from an already high level of demand in 2020), *Deliveroo Rider* (#7 breakout app in the UK) and *Baemin Riders* (#3 in South Korea) saw record levels of demand. Apps to empower individuals to earn extra money or work for themselves like *WhatsApp Business* (#1 Worldwide) and *GetNinjas* in Brazil (#2) also saw standout growth in demand as consumers turned to mobile for career freedom.

Monitor how consumer behavior manifests on mobile with App Annie. Uncover opportunities, meet your customer needs and identify nascent trends before your competitors.

Top Breakout Business Apps
by Absolute Growth in Downloads 2021 vs 2020



Source: App Annie Intelligence

Note: iOS and Google Play, China is iOS only

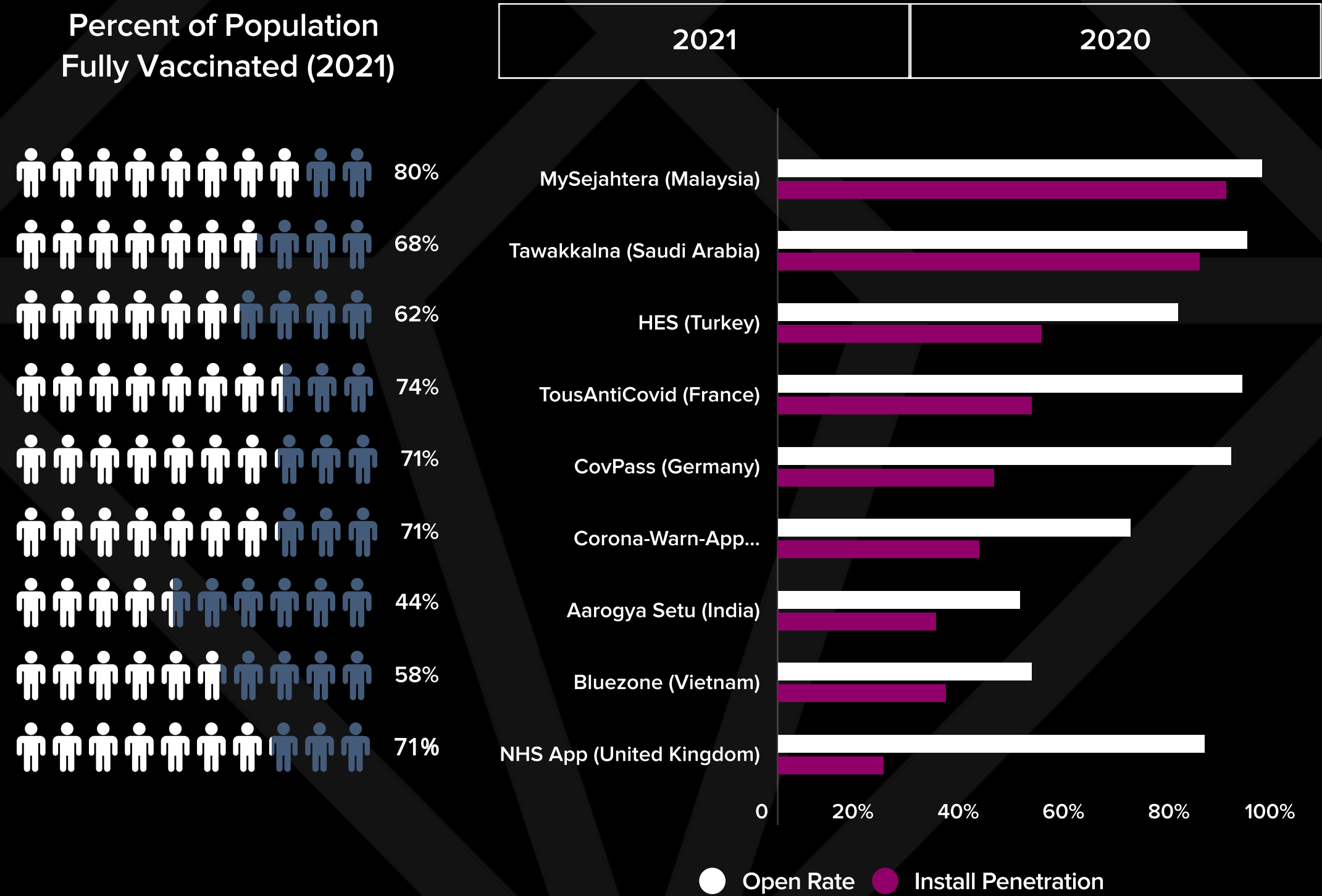
Vaccine Rollout & App Engagement Are Crucial Drivers of the Ongoing Effort to Combat Covid-19

Each market has a unique way of handling the COVID-19 pandemic at the national level. In the UK, COVID-19 information and vaccine cards were incorporated into the national healthcare app (*NHS*). App downloads increased by >300% YoY and open rate reached 81% in 2021 — showing a highly engaged user base despite a low install penetration.

Other regions have dedicated apps to help users keep track of vaccine and COVID-19 information on the go. *Malaysia's MySejahtera* and *Saudi Arabia's Tawakkalna* saw the highest install penetrations and open rates in 2021. Although *India's Aarogya Setu* app saw the highest downloads, surpassing 100M since launch (April 2020), it saw declines in open rate YoY. Not all regions have a unified nationwide app; in the US, for example, it is state-led.

Compare how COVID-19 apps have empowered consumers to trace and connect.

Install Penetration & Open Rate Among Top COVID-19 Apps by Downloads Worldwide in 2021



Source: App Annie Intelligence Note: Android Phones only. Open Rate shows the percent of the install base that opened the app in the given year for each respective country. Install Penetration shows the percent of devices with the Covid-19 app installed for the region where the app is based. CovPass was launched in June 2021 in Germany COVID-19 vaccination rate by country from Johns Hopkins University, December 31, 2021

Top Apps & Games

2021 was a very interesting year with new privacy rules on iOS, changes in app store creatives moderation policy, and the emergence of new big players in the market of app promotion — representing a challenge for the industry as a whole and for us in particular. We're fortunate that we don't have to solve these industry headwinds alone, but in partnership with App Annie.

Petr Abroskin
CMO Search and Portal
Yandex

The Yandex logo, featuring the word "Yandex" in a bold, sans-serif font. The "Y" is red, and the "andex" is black. It is positioned within a white rectangular box.

2021 Rankings by Market | Top Apps

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Worldwide

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DOWNLOADS

1		TikTok	Short Videos (Entertainment)
2		Instagram	Media Sharing Networks (Social Media)
3		Facebook	Social Networks (Social Media)
4		WhatsApp Messenger	Communication (Social Media)
5		Telegram	Communication (Social Media)
6		Snapchat	Media Sharing Networks (Social Media)
7		Facebook Messenger	Communication (Social Media)
8		ZOOM Cloud Meetings	Meeting (Business)
9		CapCut	Video Editing (Photo & Video)
10		Spotify	Music & Audio (Entertainment)

CONSUMER SPEND

1		TikTok	Short Videos (Entertainment)
2		YouTube	Video Sharing (Entertainment)
3		Tinder	Dating (Social Media)
4		Disney+	OTT (Entertainment)
5		Tencent Video	OTT (Entertainment)
6		piccoma	Comics (Books & Reference)
7		HBO Max	OTT (Entertainment)
8		Google One	File Management (Utility & Productivity)
9		Twitch	Live Streaming (Entertainment)
10		BIGO LIVE	Live Streaming (Entertainment)

MONTHLY ACTIVE USERS

1		Facebook	Social Networks (Social Media)
2		WhatsApp Messenger	Communication (Social Media)
3		Facebook Messenger	Communication (Social Media)
4		Instagram	Media Sharing Networks (Social Media)
5		Amazon	E-Commerce (B2C) (Shopping)
6		TikTok	Short Videos (Entertainment)
7		Telegram	Communication (Social Media)
8		Twitter	MicroBlogging (Social Media)
9		Spotify	Music & Audio (Entertainment)
10		Netflix	OTT (Entertainment)

[Learn More: Uncover the Most Popular Apps By Market](#)

Source: App Annie Intelligence Note: Downloads and consumer spend based on combined iOS App Store and Google Play. MAU based on Combined iPhone and Android Phone Monthly Active Users; Excluding pre-installed Apps. Market-level rankings

2021 Rankings by Market | Top Games

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Worldwide

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DOWNLOADS

1		Free Fire	Battle Royale (Shooting)
2		Subway Surfers	Runner (Action)
3		ROBLOX	Creative Sandbox (Simulation)
4		Bridge Race	.io (Hypercasual)
5		Candy Crush Saga	M3-Saga (Match)
6		PUBG MOBILE	Battle Royale (Shooting)
7		Ludo King	Board Game (Tabletop)
8		Hair Challenge	Action (Hypercasual)
9		Among Us!	Mafia/Betrayal (Party)
10		Join Clash 3D	Action (Hypercasual)

CONSUMER SPEND

1		ROBLOX	Creative Sandbox (Simulation)
2		Genshin Impact	Open World RPG (RPG)
3		Coin Master	Luck Battle (Party)
4		Honour of Kings	MOBA (Action)
5		Candy Crush Saga	M3-Saga (Match)
6		PUBG MOBILE	Battle Royale (Shooting)
7		Pokémon GO	Location RPG (RPG)
8		Uma Musume Pretty Derby	Idol Training Sim (Simulation)
9		Game For Peace	Battle Royale (Shooting)
10		Homescapes	M3-Meta (Match)

MONTHLY ACTIVE USERS

1		PUBG MOBILE	Battle Royale (Shooting)
2		ROBLOX	Creative Sandbox (Simulation)
3		Candy Crush Saga	M3-Saga (Match)
4		Free Fire	Battle Royale (Shooting)
5		Among Us!	Mafia/Betrayal (Party)
6		Ludo King	Board Game (Tabletop)
7		Minecraft Pocket Edition	Creative Sandbox (Simulation)
8		Subway Surfers	Runner (Action)
9		Call of Duty: Mobile	Team Deathmatch (Shooting)
10		Pokémon GO	Location RPG (RPG)

[Learn More: Uncover the Most Popular Games By Market](#)

Source: App Annie Intelligence Note: Downloads and consumer spend based on combined iOS App Store and Google Play. MAU based on Combined iPhone and Android Phone Monthly Active Users; Excluding pre-installed Apps. Market-level rankings

2021 Rankings by Market | Top Companies - Apps

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Worldwide

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DOWNLOADS

	Company	HQ	Top Apps by Downloads	
1	Google	United States		Google Meet
2	Meta	United States		Instagram
3	ByteDance	China		TikTok
4	Microsoft	United States		Microsoft Teams
5	InShot Inc	China		InShot
6	Alibaba Group	China		Alibaba.com
7	Amazon	United States		Amazon
8	Tencent	China		Tencent Video
9	ABISHKKING	Hong Kong		Free Video Downloader - Video Downloader App
10	NAVER	South Korea		B612

CONSUMER SPEND

	Company	HQ	Top Apps by Consumer Spend	
1	Google	United States		YouTube
2	Match Group	United States		Tinder
3	Tencent	China		Tencent Video
4	Disney	United States		Disney+
5	ByteDance	China		TikTok
6	Amazon	United States		Twitch
7	AT&T	United States		HBO Max
8	Kakao Japan Corp	Japan		piccoma
9	LINE	Japan		LINE
10	JOYY Inc.	China		BIGO LIVE

[Learn More: Uncover the Top Apps Publishers Across Different Markets](#)

Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

2021 Rankings by Market | Top Companies - Games

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Worldwide

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DOWNLOADS

	Company	HQ		Top Games by Downloads
1	AppLovin	United States		Project Makeover
2	Voodoo	France		aquapark.io
3	Azur Interactive Games	Cyprus		WormsZone.io
4	SayGames	Belarus		DOP 2: Delete One Part
5	ironSource	Israel		Bridge Race
6	Crazy Labs	Israel		Phone Case DIY
7	Zynga	United States		Hair Challenge
8	Tencent	China		8 Ball Pool
9	OneSoft	Vietnam		1945 Air Forces
10	Jinke Culture - Outfit7	China		My Talking Tom Friends

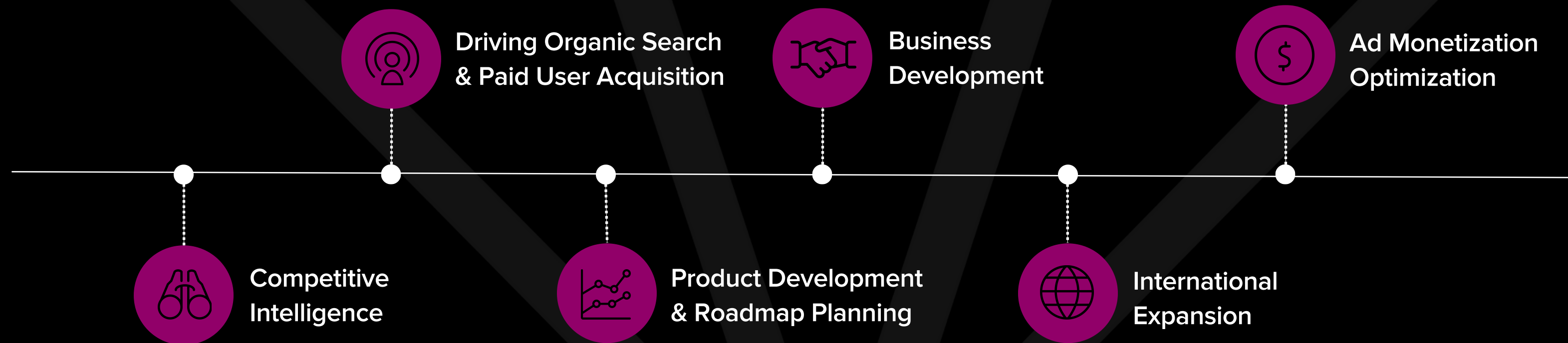
CONSUMER SPEND

	Company	HQ		Top Games by Downloads
1	Tencent	China		Honour of Kings
2	NetEase	China		Fantasy Westward Journey
3	Activision Blizzard	United States		Candy Crush Saga
4	Playrix	Ireland		Homescapes
5	Zynga	United States		Empires & Puzzles
6	Supercell	Finland		Clash of Clans
7	Playtika	Israel		BINGO Blitz
8	Roblox	United States		ROBLOX
9	Netmarble	South Korea		Marvel Contest of Champions
10	miHoYo	China		Genshin Impact

Learn More: Uncover the Top Games Publishers Across Different Markets

Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

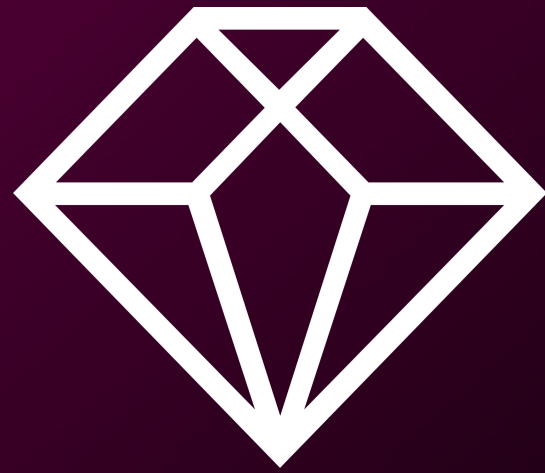
We Fuel Mobile Excellence & Monetization



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