



# State of Mobile 2022



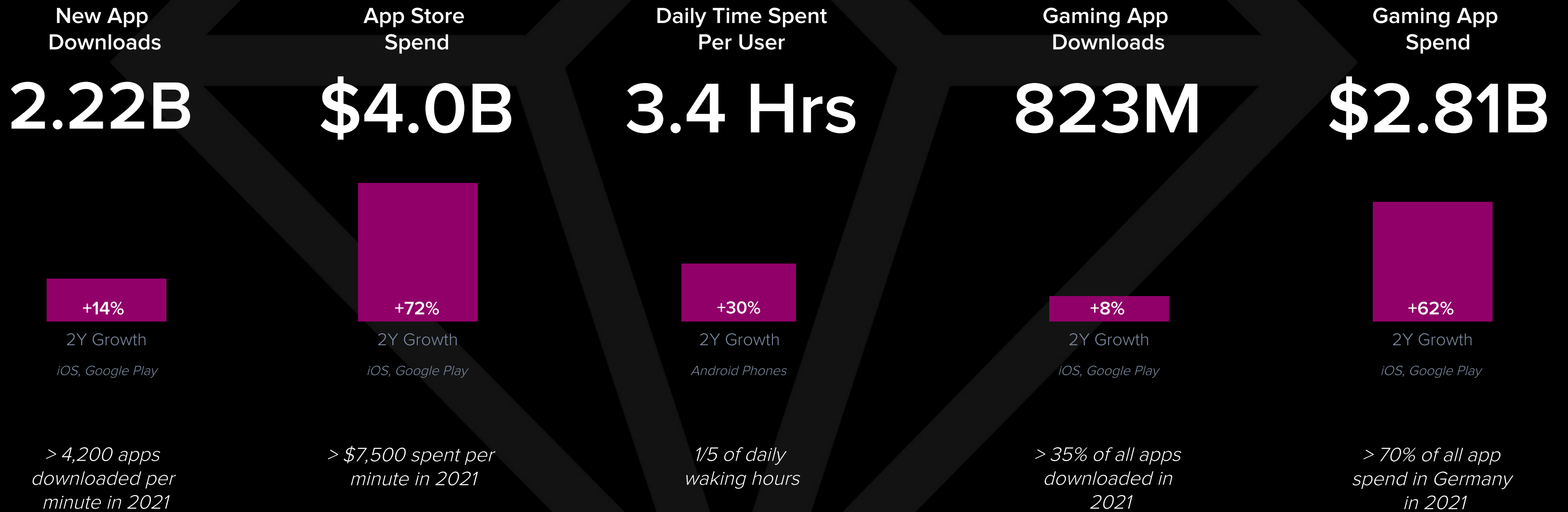
GERMANY

[appannie.com](https://appannie.com)



EXECUTIVE SUMMARY:

# 2021 German Mobile Landscape at a Glance



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*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



# 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



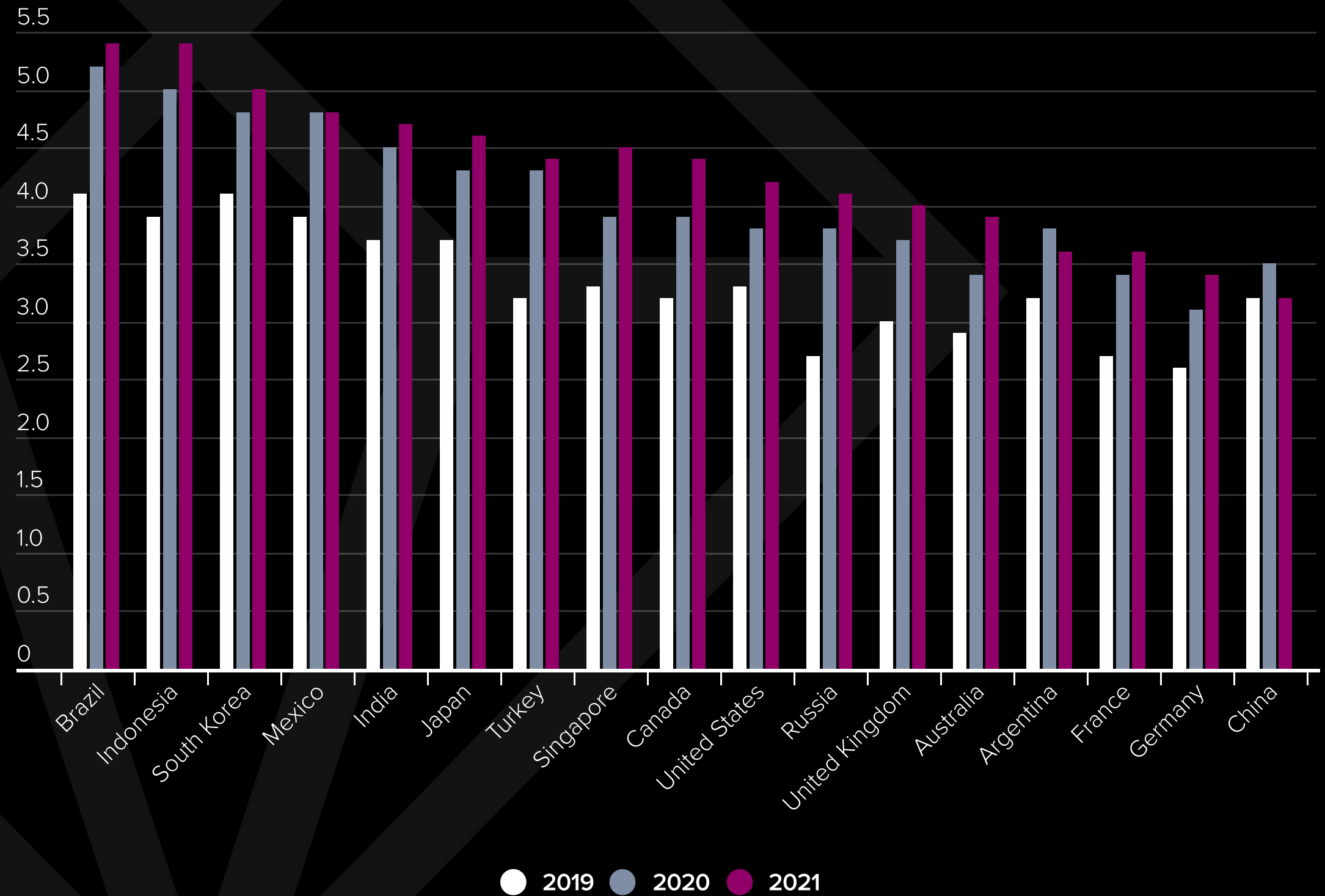
# Germany Spent 1/5 of Waking Hours on Mobile, Up 30% Since 2019

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.

Although the average German watched 3.7 hours of TV a day in 2020, the time they spend on their mobile devices is quickly set to surpass that.

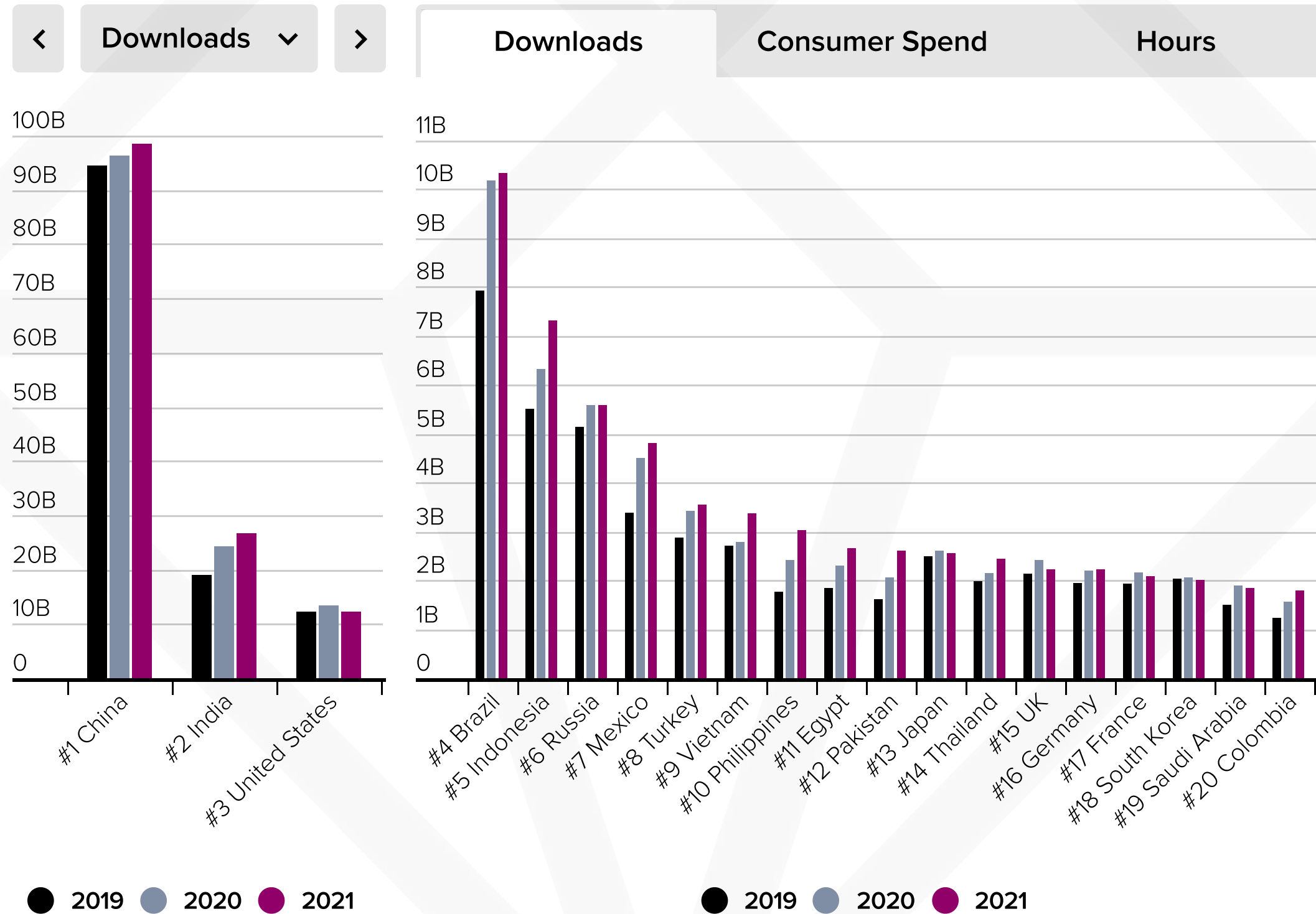
**Mobile usage estimates highlight growth sectors to inform strategic roadmap and investment priorities. Know where to make strategic decisions: advertising spend, corporate prioritization and resource allocation follow the eyeballs — and they are on mobile.**

Average Hours Spent on Mobile Per Day Per User



Source: App Annie Intelligence  
Note: Android phones

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

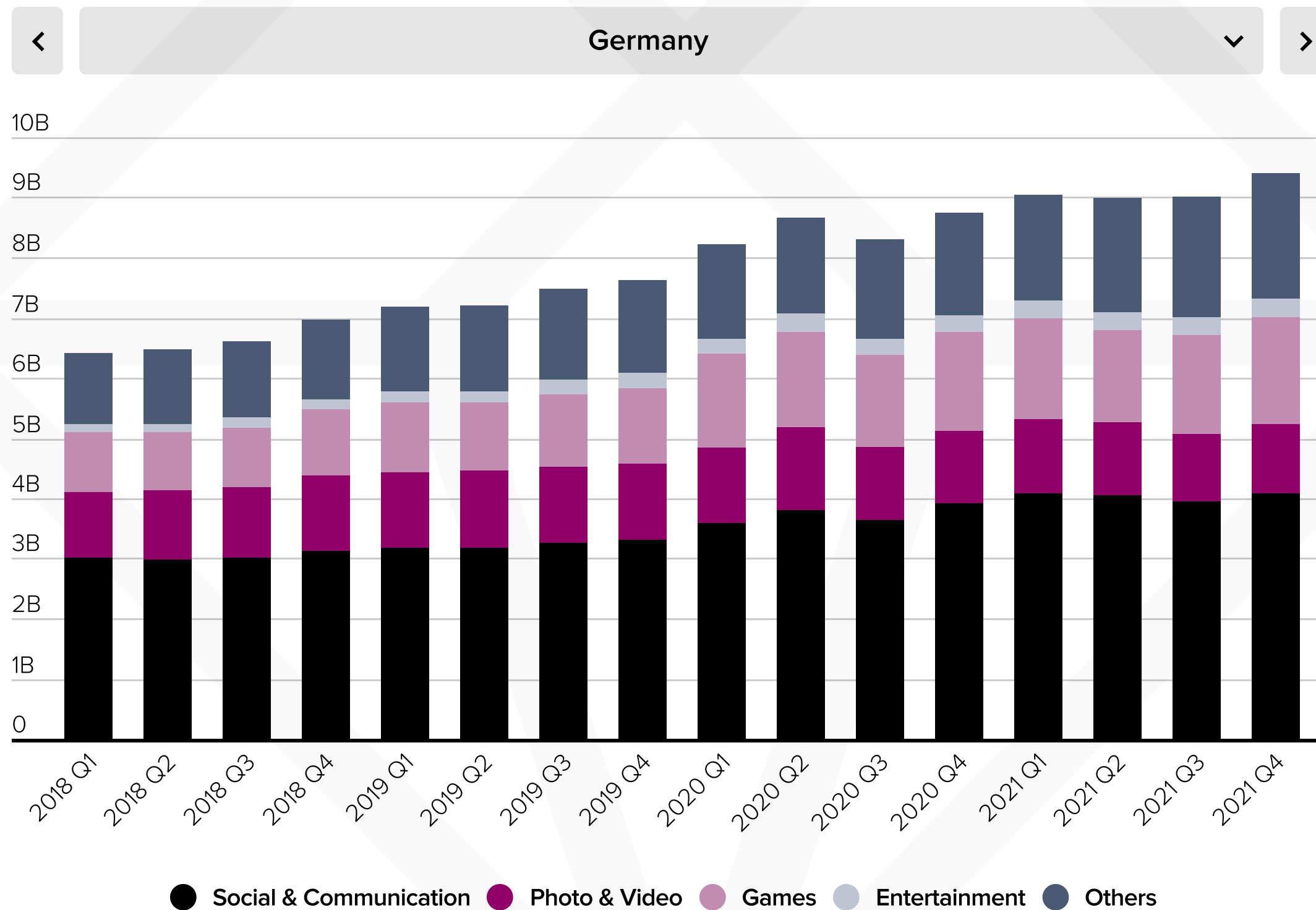
# Globally 230 Billion Downloads, \$170 Billion in Consumer Spend, 3.8 Trillion Hours

Germany has seen phenomenal growth in consumer spend, adding an additional \$4.0 billion in 2021, \$850 million 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.**

## Hours Spent in Apps by Category



Source: App Annie Intelligence  
Note: Android phones

### MACRO MOBILE TRENDS

# In Germany, 6 Out 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

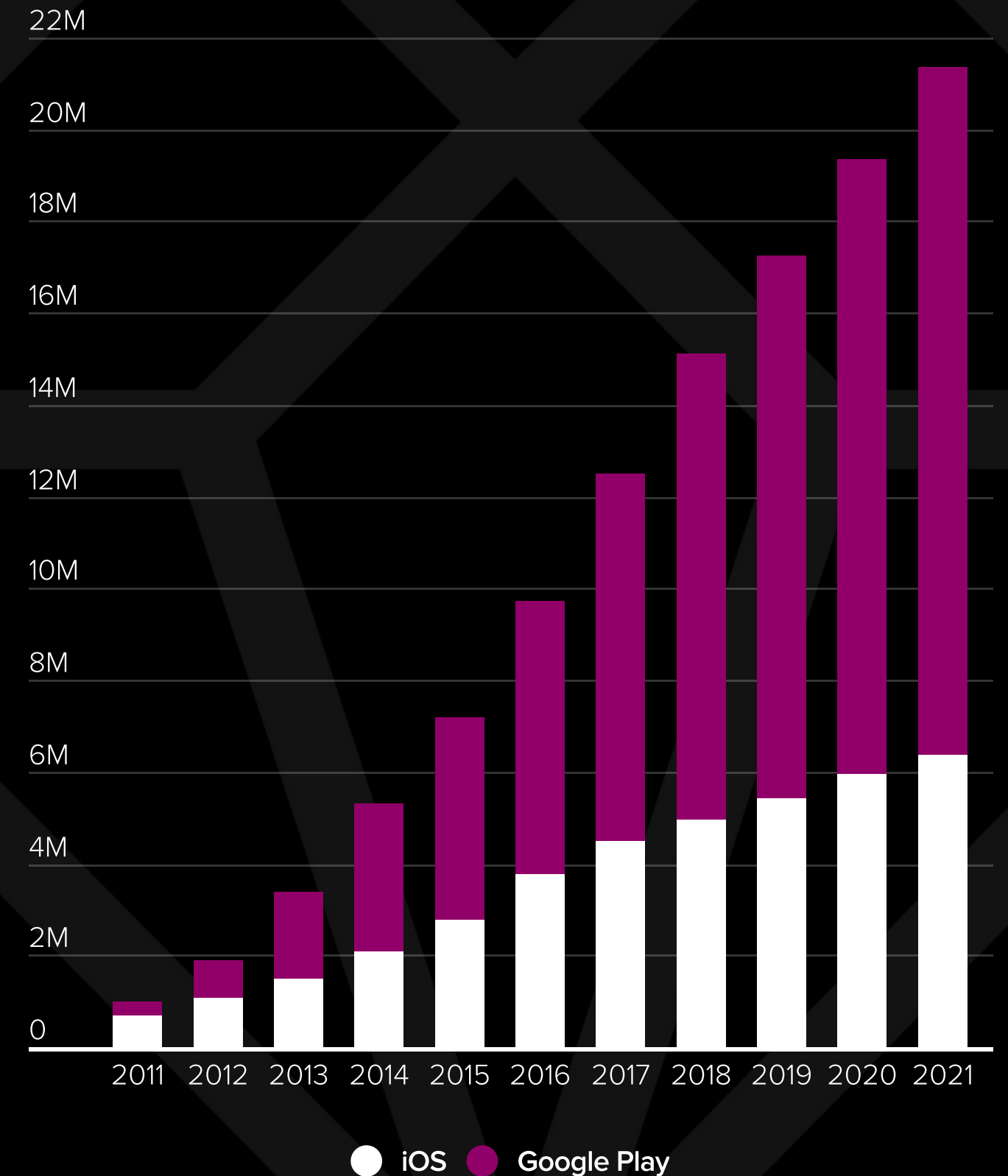
This brings the total of apps and games ever released on iOS and Google Play to over 21 million.

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

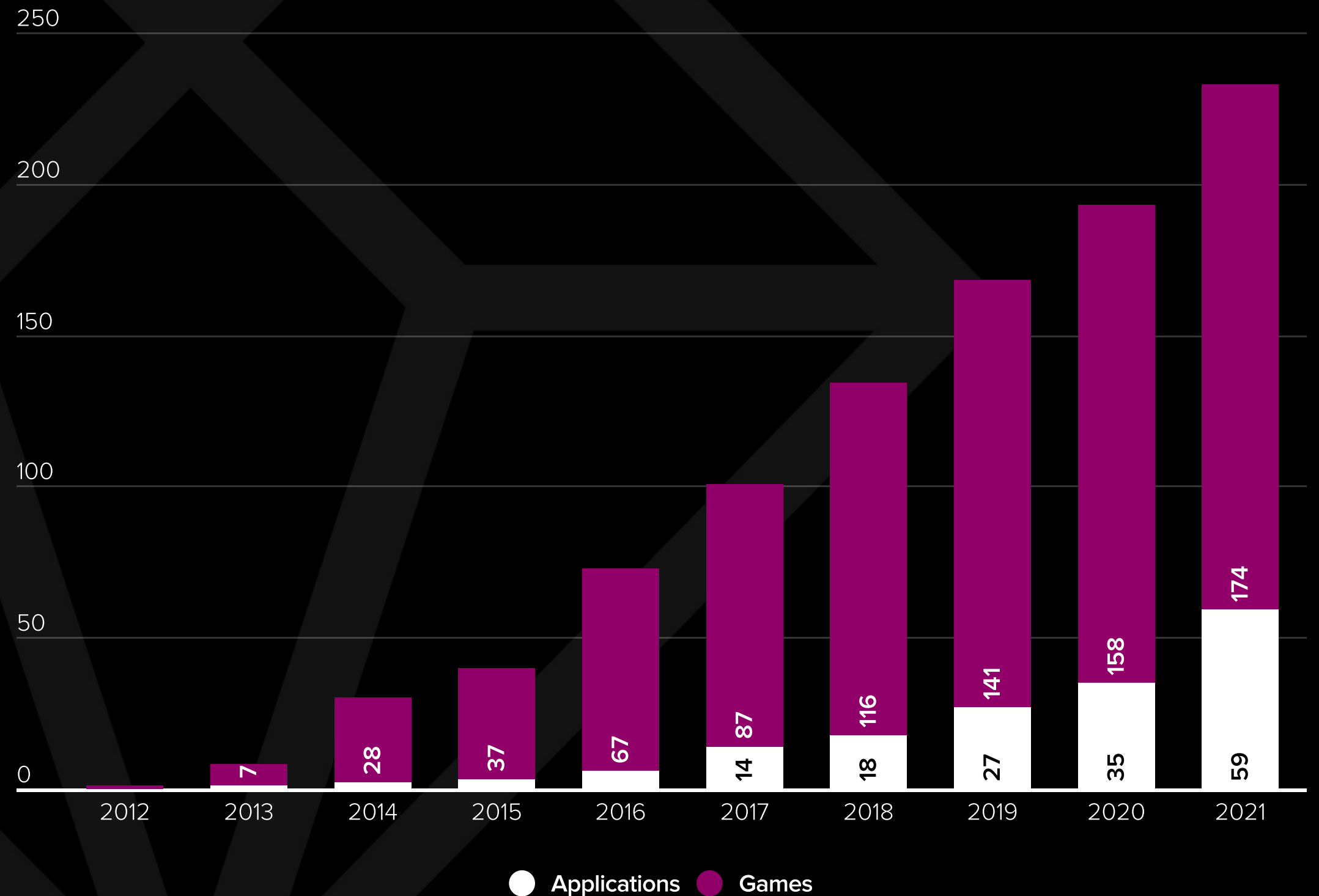
# 233 Apps & Games Generated Over \$100 Million Dollars Annually in 2021

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

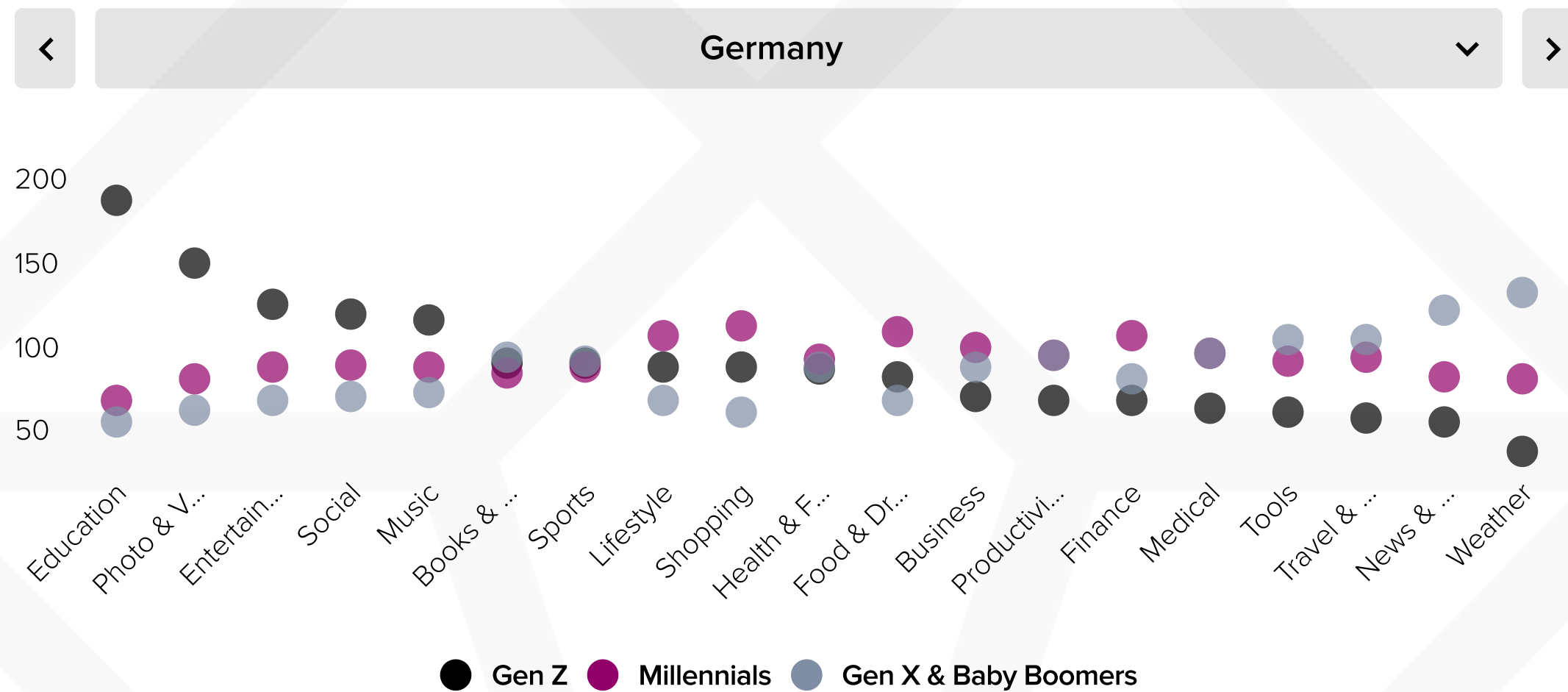


Source: App Annie Intelligence

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

Rank	Gen Z	Millennials	Gen X & Baby Boomers
1	WhatsApp Messenger	Facebook	CovPass
2	Instagram	Amazon	Corona-Warn-App
3	Spotify	Facebook Messenger	Weather & Radar
4	TikTok	eBay Kleinanzeigen	Signal Private Messenger

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

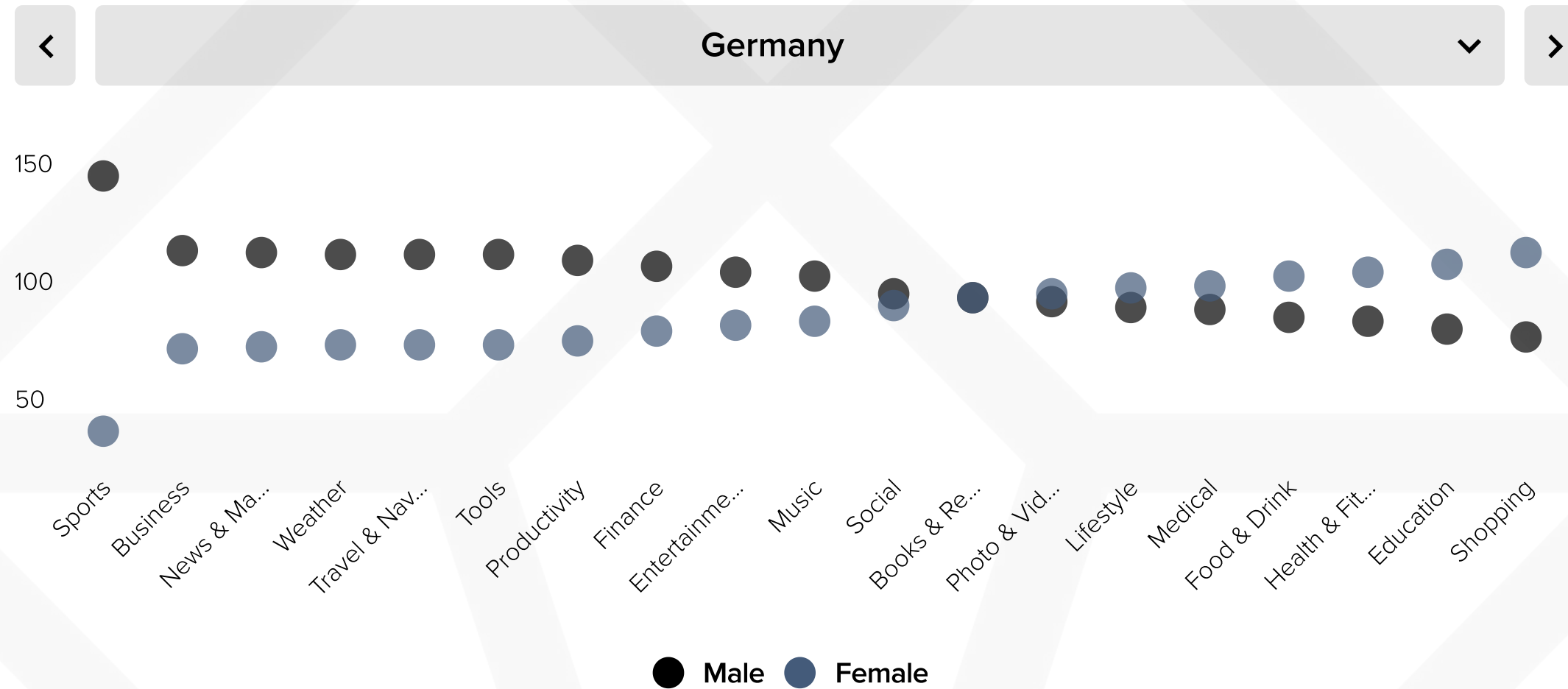
Apps in categories that are already highly relevant to Gen Z can be excellent partners to help you increase engagement, including Photo & Video, Entertainment, and Social.

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.**

## 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	Amazon	WhatsApp Messenger
2	CovPass	Facebook
3	Corona-Warn-App	Instagram
4	eBay Kleinanzeigen	Facebook Messenger

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

## MACRO MOBILE TRENDS: DEMOGRAPHICS

# Market Differences Emerge by Gender Based on App Category

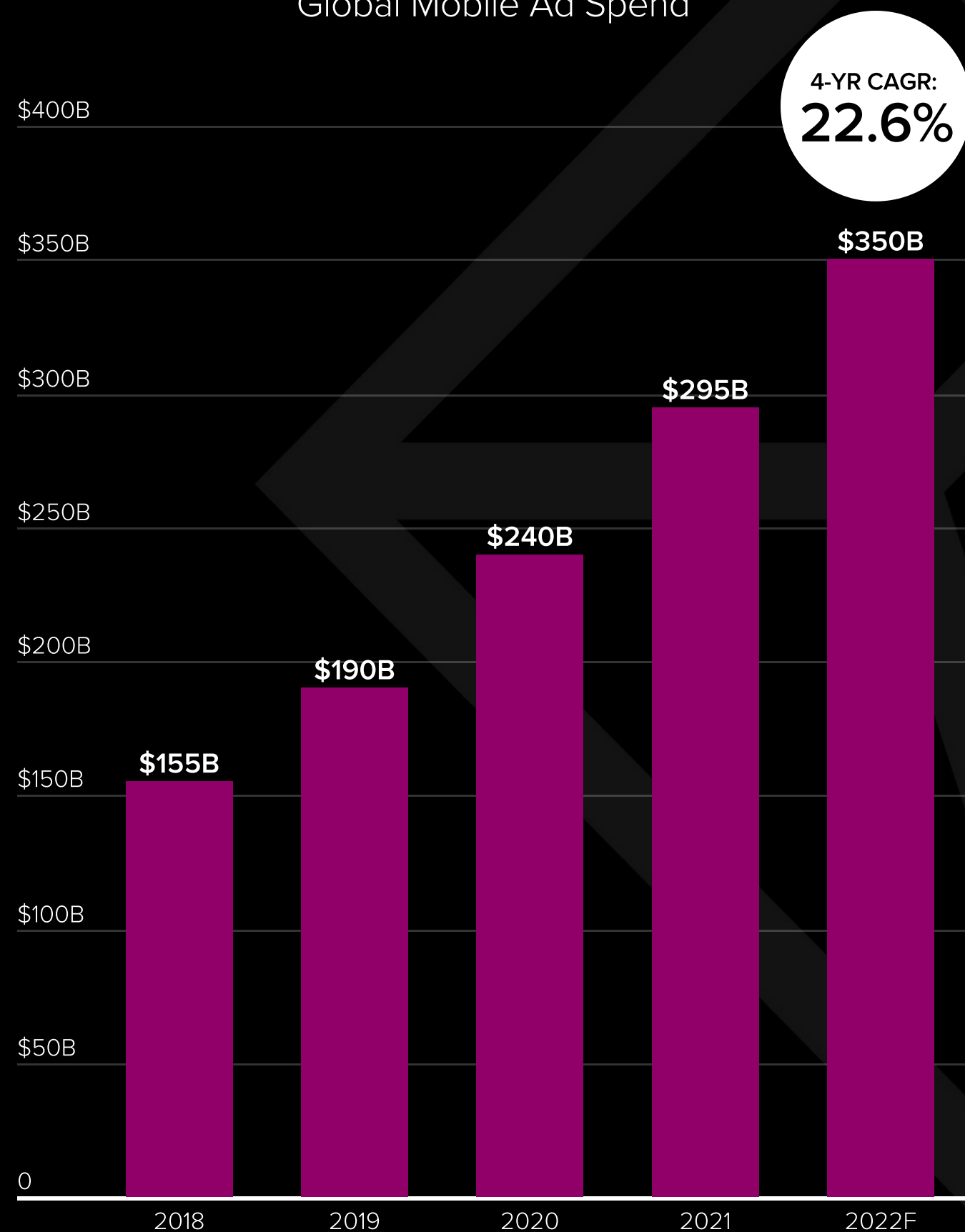
Sports apps overindex heavily with males in each market analyzed, whereas Food & Drink apps tend to skew more female. However, the difference can be subtle in the case of Germany for Food & Drink and more dramatic in other markets like Japan.

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 Germany, Japan, the UK, 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.](#)**

## 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	まいなぼいんとアプリ	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

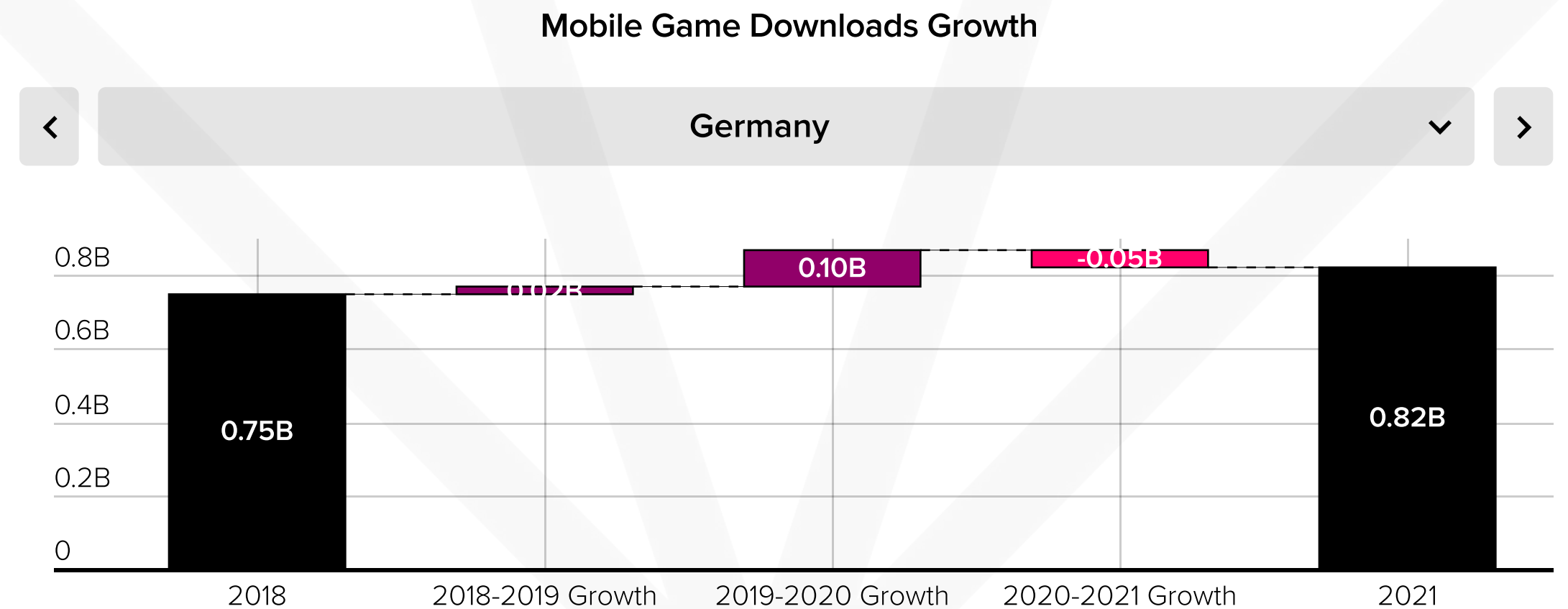
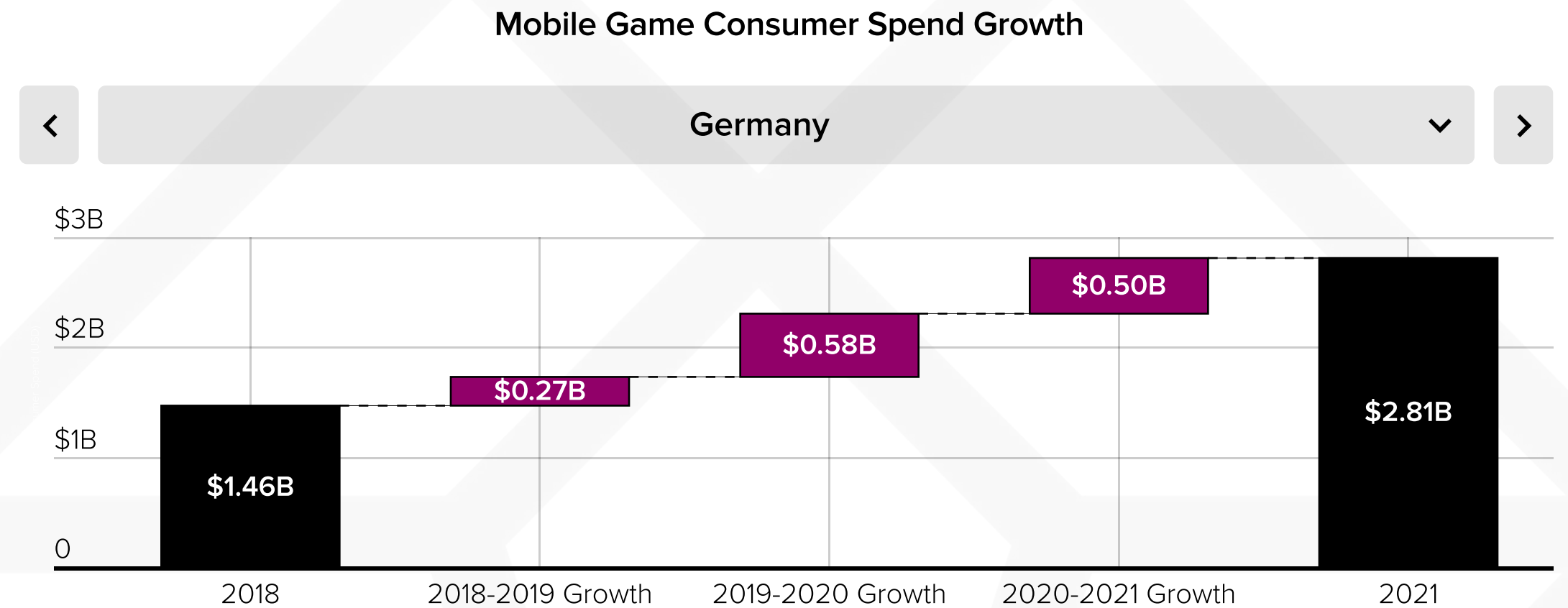


# In Germany, Additional \$500 Million in Gaming Consumer Spend was Added in 2021, Bringing Total to \$2.8 Billion

In 2021, hit games such as *Roblox* and *Genshin Impact* saw further growth in consumer spend worldwide 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 such as *Hair Challenge* and *Count Masters* 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.


















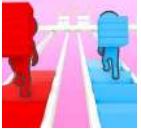

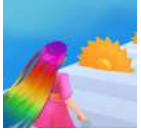


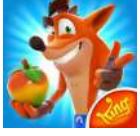
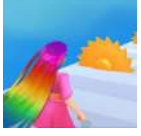

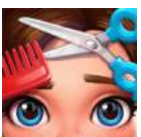



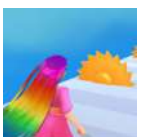


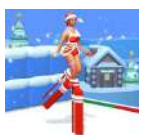
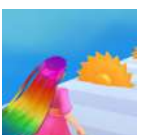


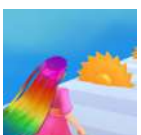











**Mobile game sustained strong momentum from pandemic surge — 2021 in gaming was as dynamic as any previous year. The time to act is now.**



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

	EMEA - Breakout Downloads							
	Worldwide	United Kingdom	France	Germany	Russia	Turkey	Italy	Spain
1	 Bridge Race	 Count Masters	 Count Masters	 Count Masters	 PUBG: NEW STATE	 Going Balls	 Count Masters	 Count Masters
2	 Hair Challenge	 High Heels	 Hair Challenge	 Project Makeover	 DOP 2: Delete One Part	 Bridge Race	 Hair Challenge	 Stumble Guys
3	 Count Masters	 Bridge Race	 Project Makeover	 Hair Challenge	 Going Balls	 Phone Case DIY	 Crash Bandicoot: On the Run	 Hair Challenge
4	 Phone Case DIY	 Project Makeover	 Bridge Race	 DOP 2: Delete One Part	 Phone Case DIY	 Hair Challenge	 DOP 2: Delete One Part	 DOP 2: Delete One Part
5	 High Heels	 Hair Challenge	 Mots Malins	 Royal Match	 Hair Challenge	 Count Masters	 Phone Case DIY	 Phone Case DIY
								

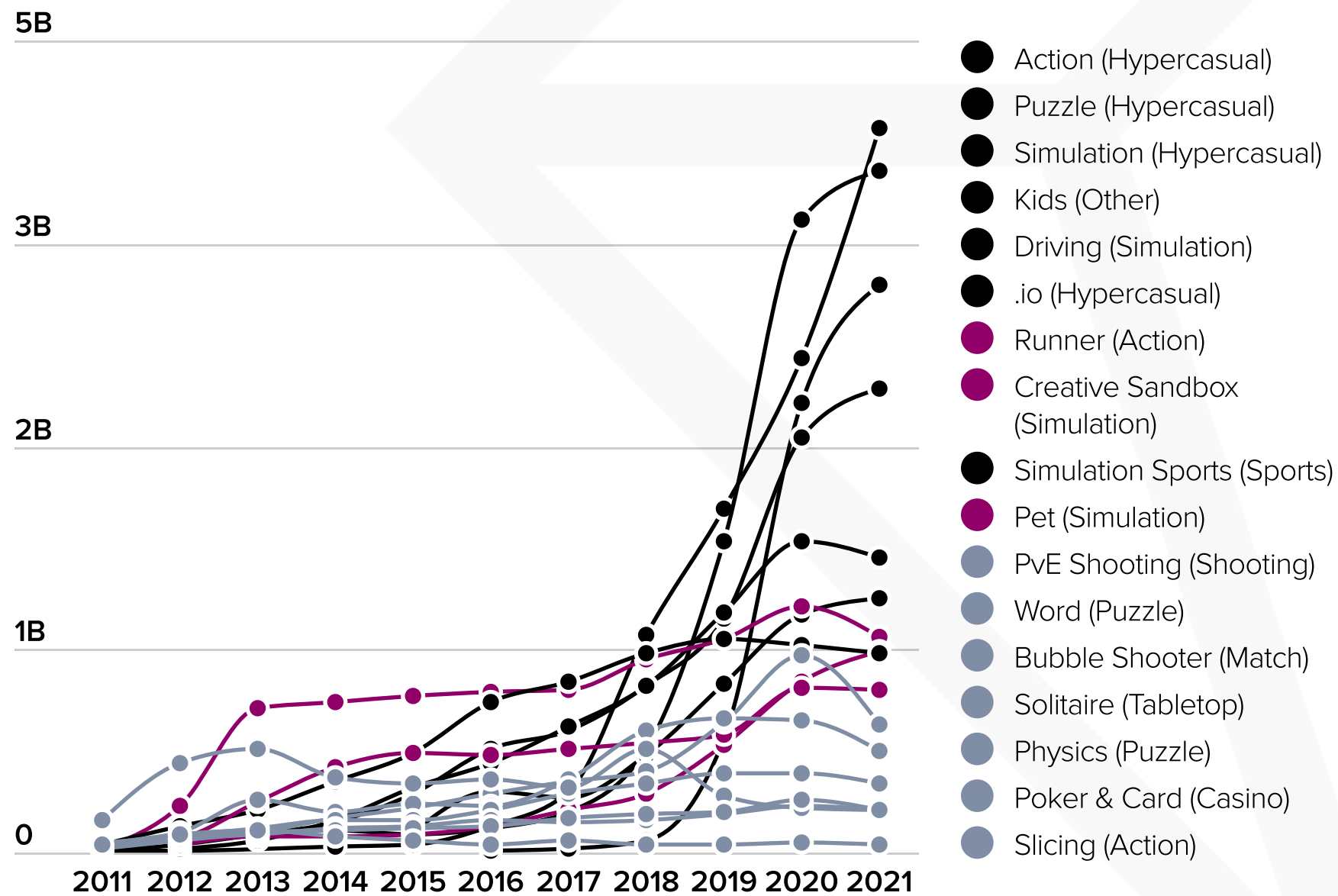
Learn More: [Uncover the Top Games by Change in Yearly Downloads](#)

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

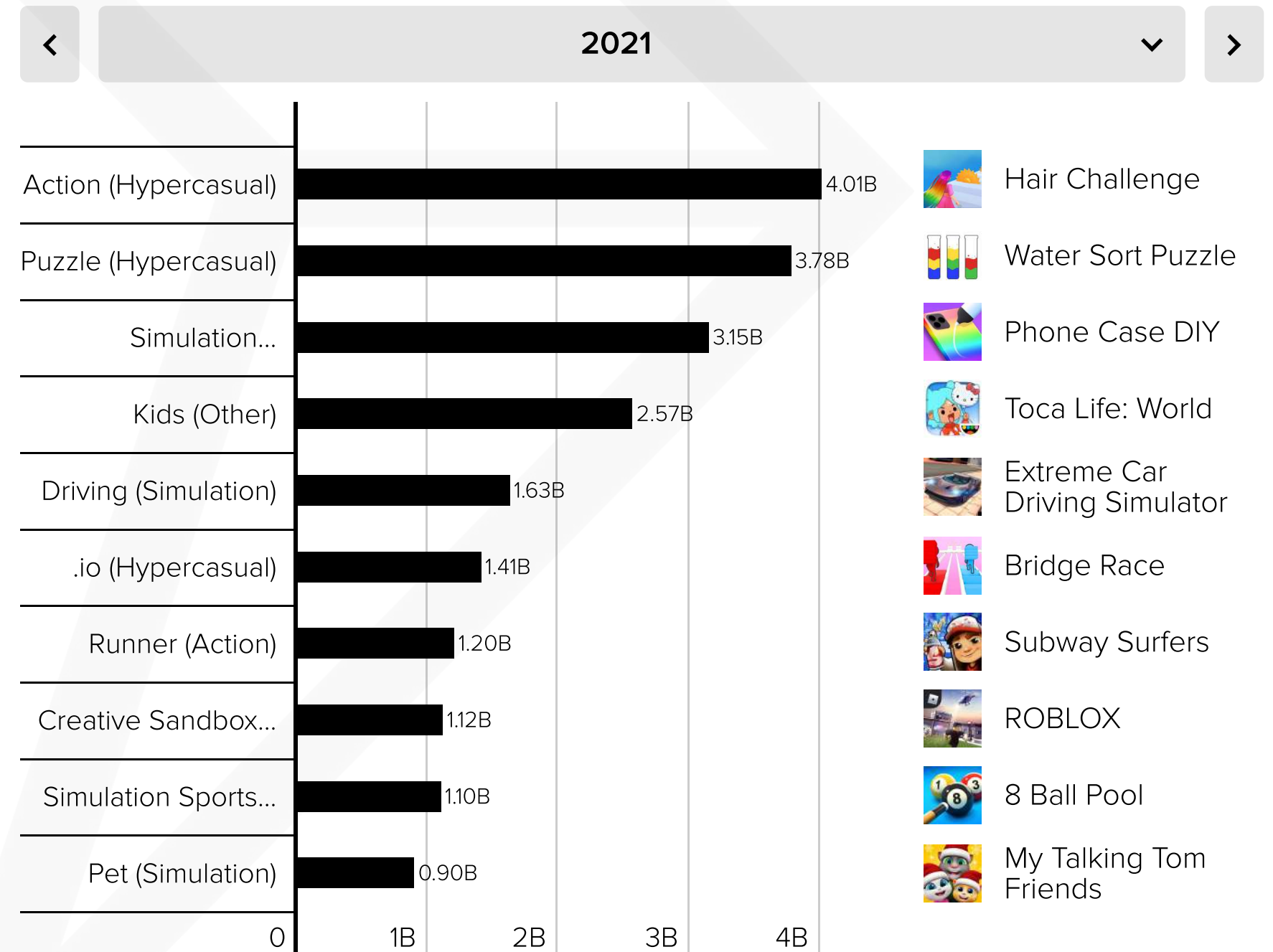
# Astronomical Rise of Hypercasual: Innovation & Shifting Player Preferences Gave Way to Emerging Game Genres

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



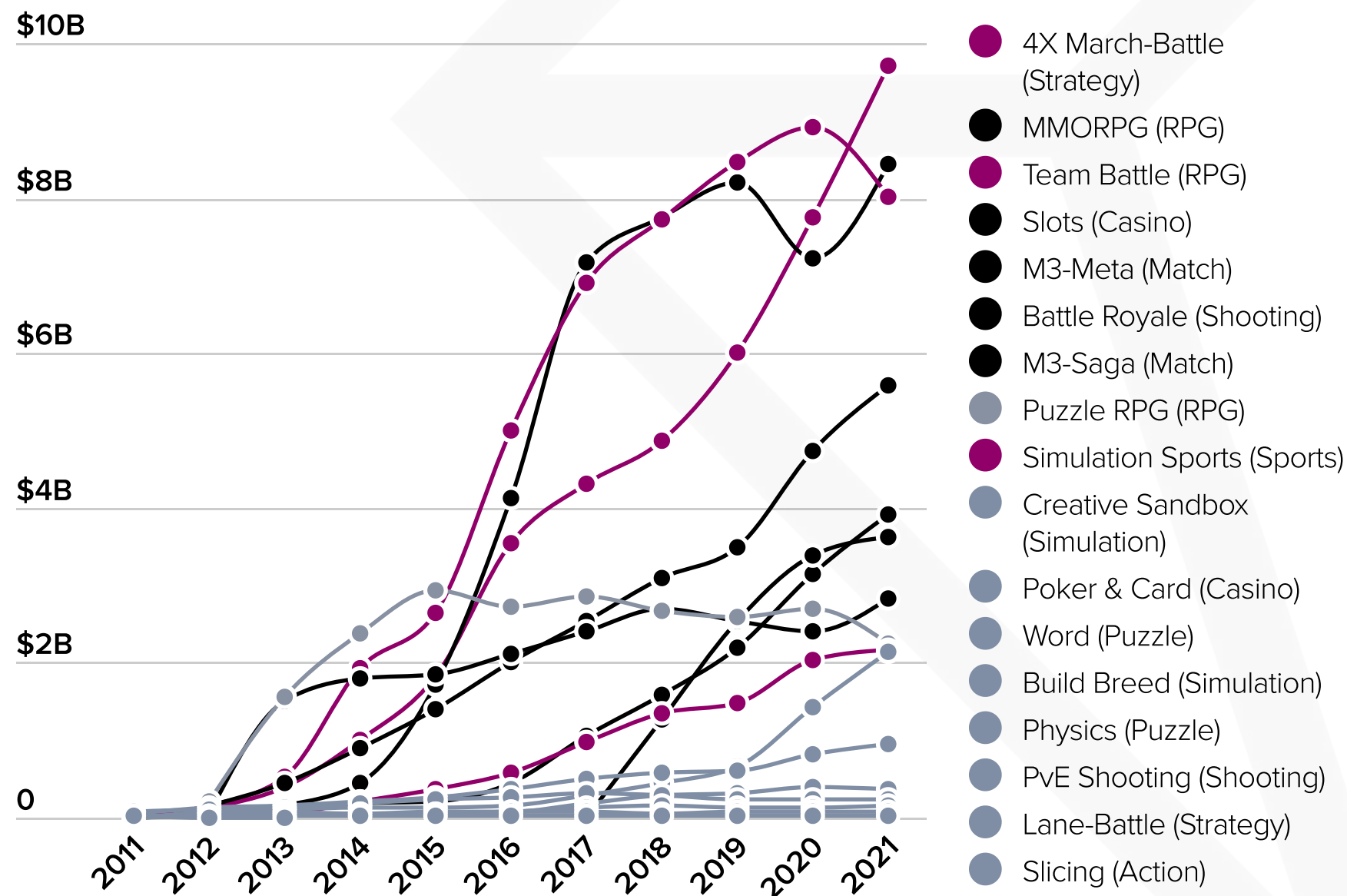
[Analyze More Genres in App Annie's Game IQ Market Sizing Report](#)

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

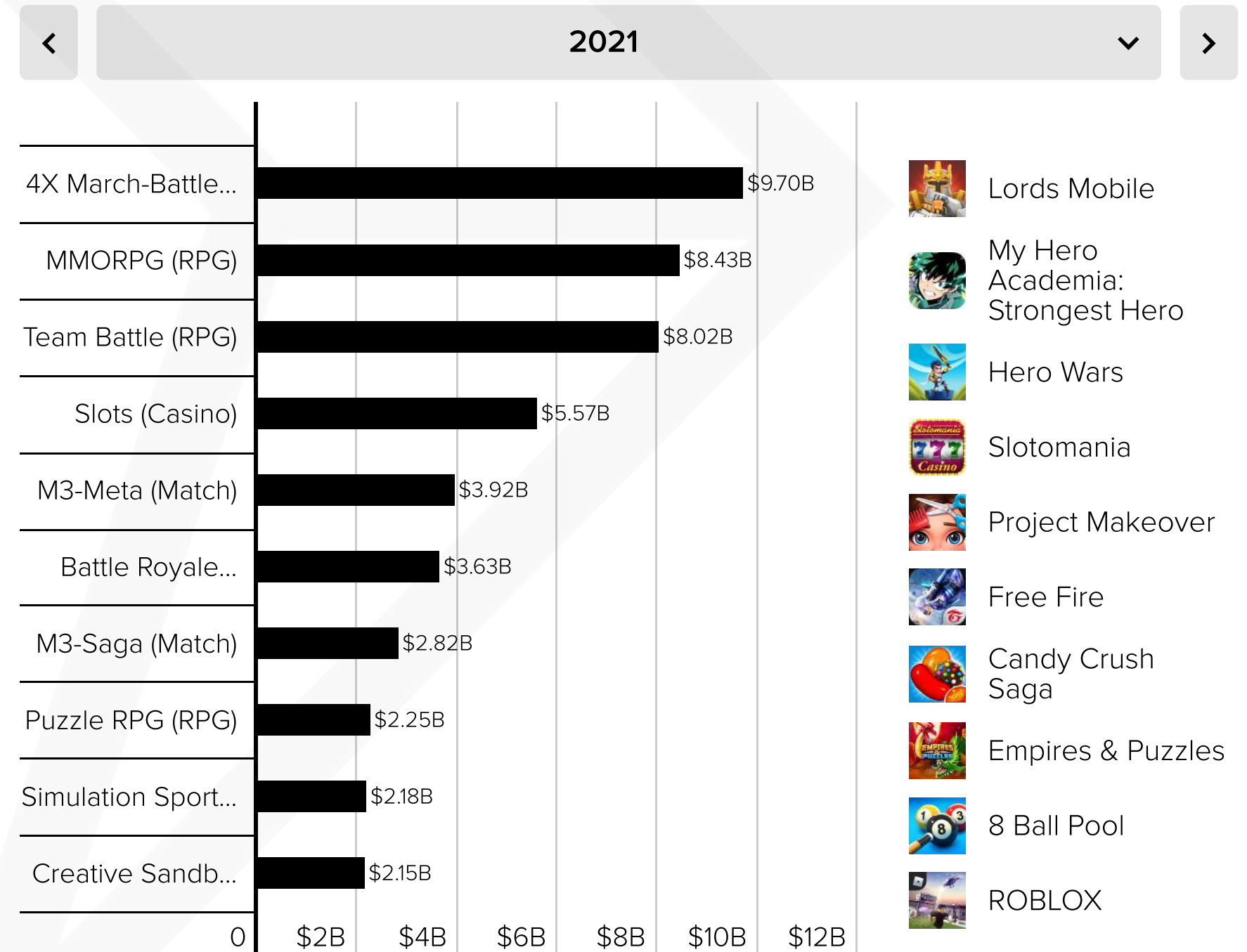
# 4x March-Battle Strategy Games Emerged as the Most Monetizable Genre for Mobile Games

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

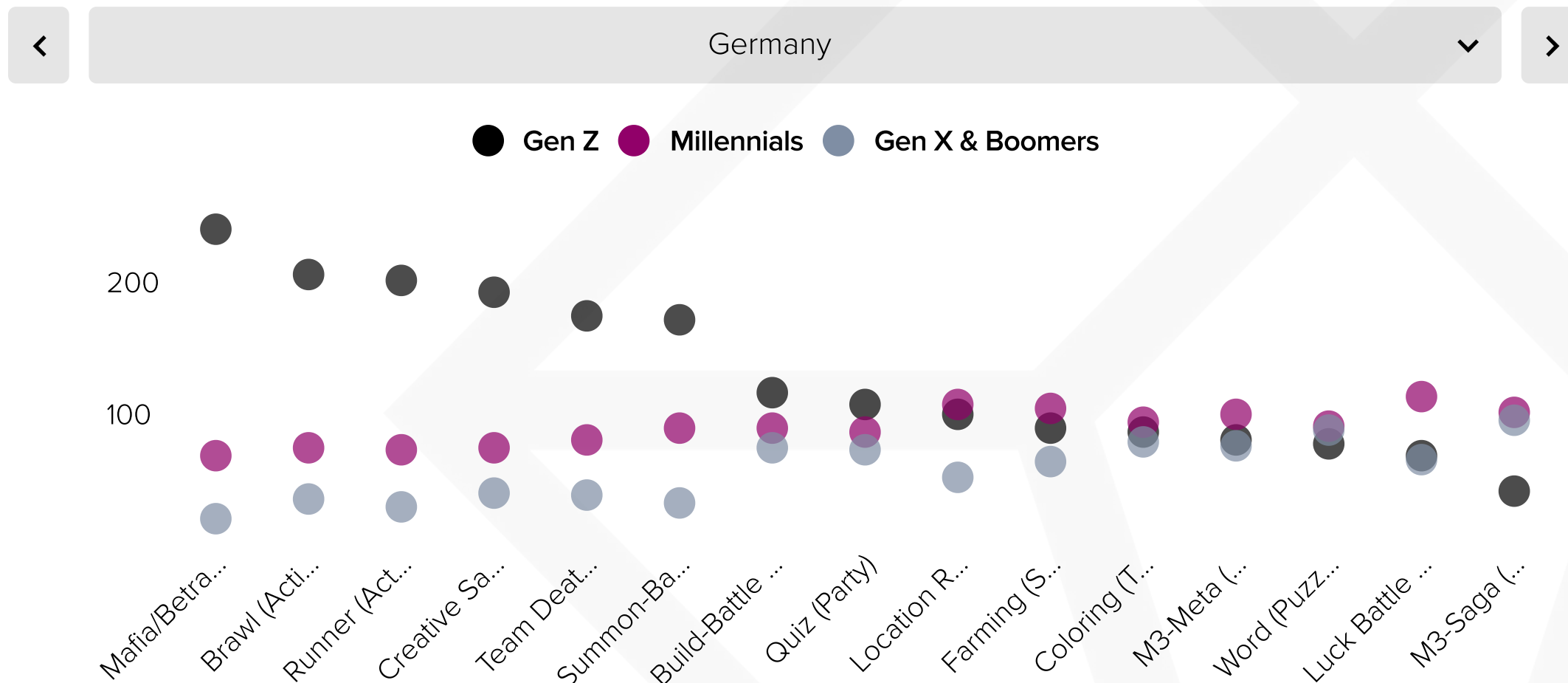


[Analyze More Genres in App Annie's Game IQ Market Sizing Report](#)

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



## GAMING

# Party, Action, Simulation, & Shooting Games Skew Towards Gen Z; Match 3 & Puzzle Preferred By Older Age Groups

Gen Z gamers in Germany are around 2.5x more likely to play Mafia/ Betrayal (Party) games such as *Among Us!*, while Millennials are around 1.3x more likely to play Luck Battle (Party) games such as *Coin Master* compared to the average population.

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

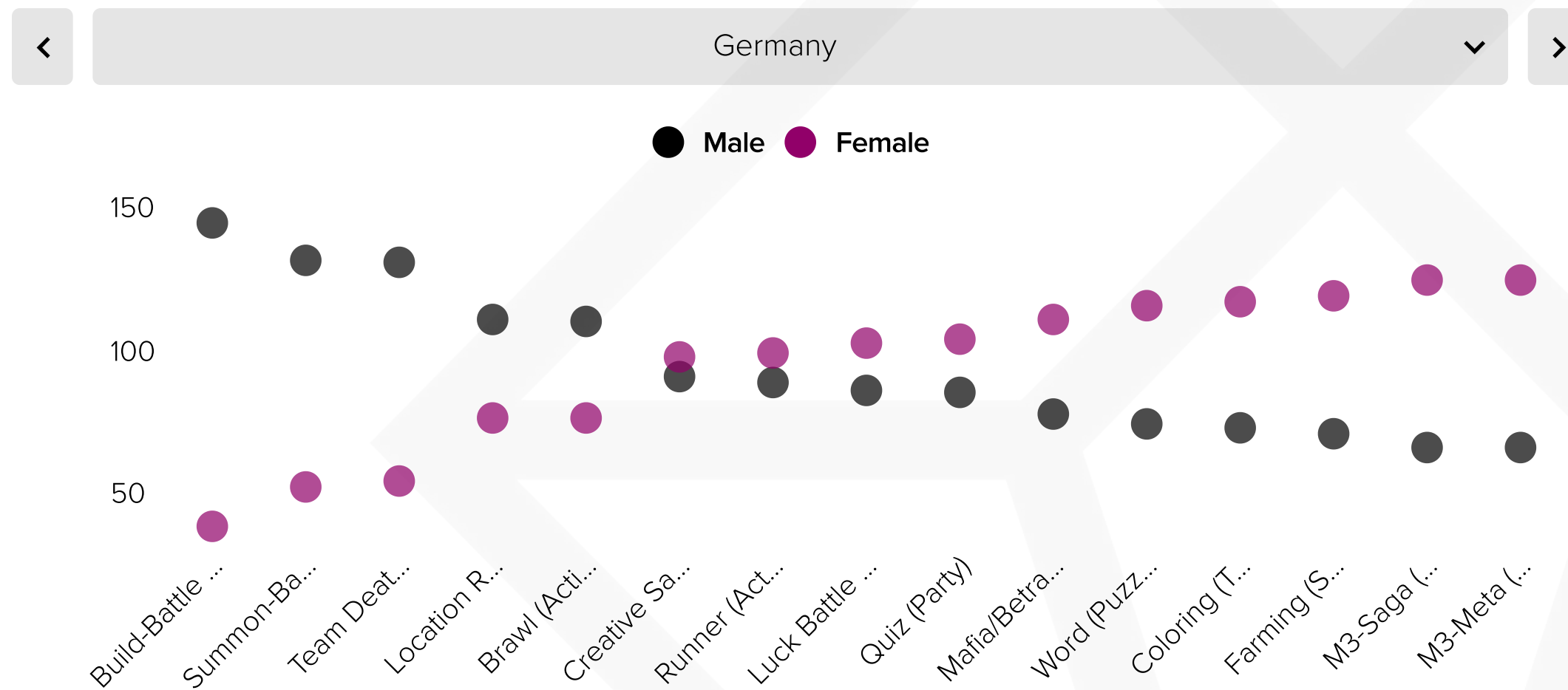
Rank	Gen Z	Millennials	Gen X & Baby Boomers
1	ROBLOX Creative Sandbox (Simulation)	Candy Crush Saga M3-Saga (Match)	New Quizduel Quiz (Party)
2	Pokémon GO Location RPG (RPG)	Homescapes M3-Meta (Match)	Fishdom: Deep Dive M3-Meta (Match)
3	Among Us! Mafia/Betrayal (Party)	Gardenscapes - New Acres M3-Meta (Match)	Toon Blast Blast-Saga (Match)

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.](#)

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.

## 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	Location RPG (RPG)	ROBLOX
2	Brawl Stars	Brawl (Action)	Creative Sandbox (Simulation)
3	Clash Royale	Summon-Battle (Strategy)	Candy Crush Saga
		Among Us!	M3-Saga (Match)
			Mafia/Betrayal (Party)

*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 Germany, the US, France, and Japan, female gamers are around 1.3x more likely to play M3-Saga (Match) games, and male gamers in Germany are 1.5x more likely to play Build-Battle (Strategy) games than the general population.

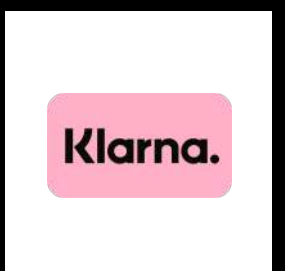
Not only are ROBLOX, Candy Crush Saga, and Among Us! clear favorites among Gen Z, they also have higher tendency to be played by female audiences. Pokémon GO has enjoyed widespread popularity globally, but tends to skew towards a male audience.

**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](#).**

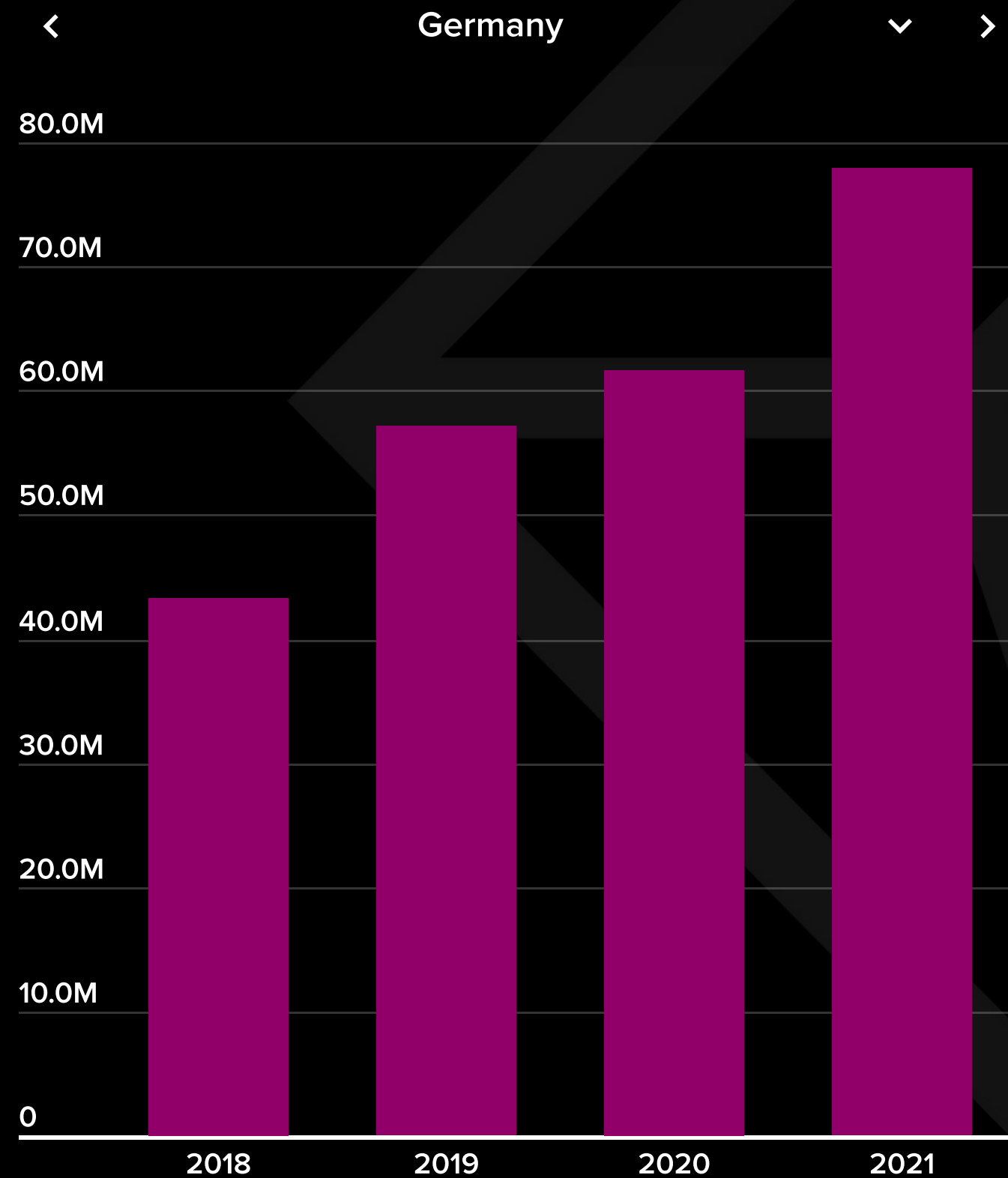
# Finance

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



## Finance App Downloads by Country



Source: App Annie Intelligence

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

### FINANCE

## Finance App Downloads in Germany Surpassed 77M in 2021, a 25% YoY Increase and an 80% Increase Since 2018

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.

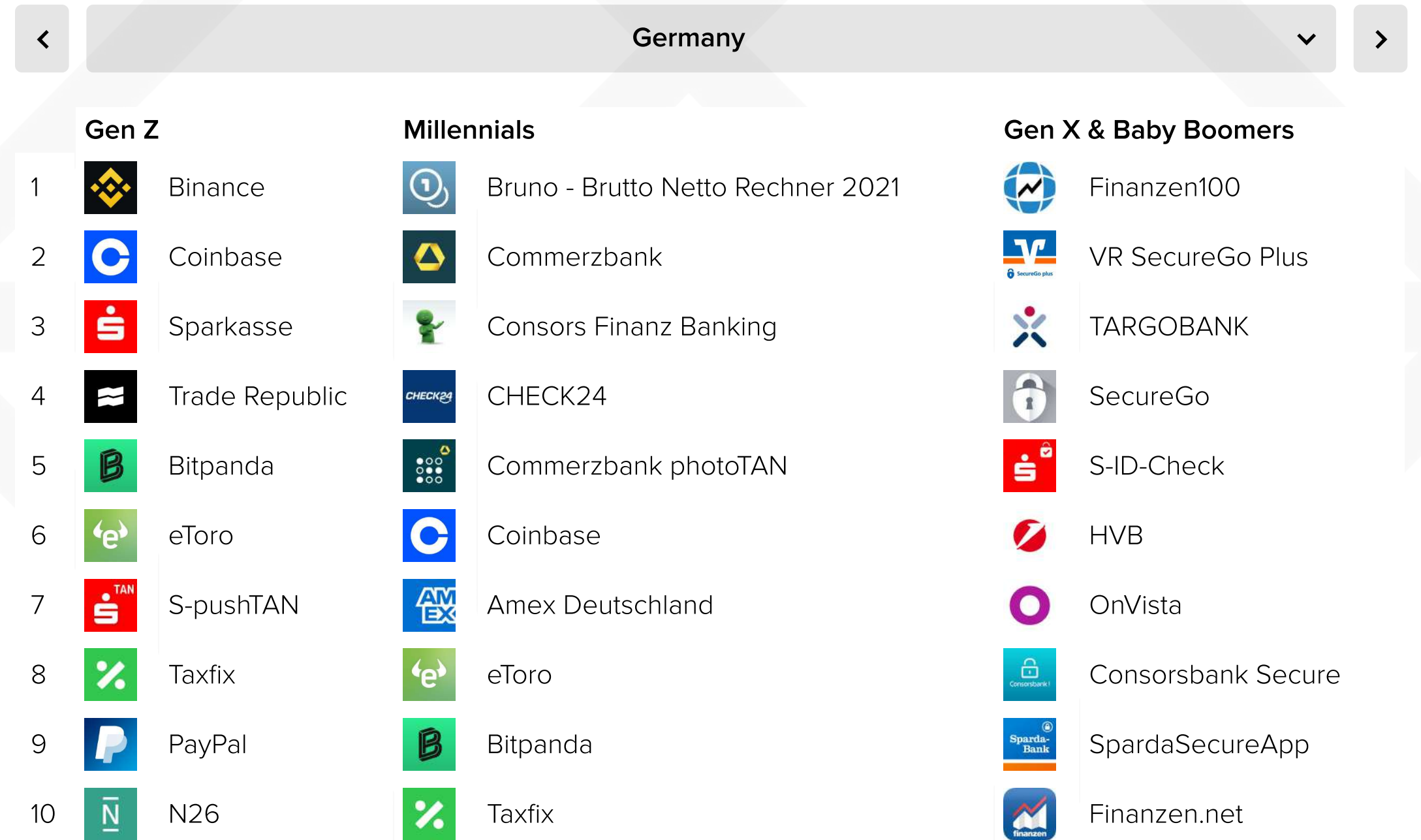
# Embracing Innovation: Gen Z Are Most Likely to Use Neobanks and Cryptocurrency Trading Apps

Although retail banks are widely used by Gen X and Baby Boomers, Gen Z are most likely to use trading apps and neobanks across most markets. In addition, they also prefer to use money transfer apps such as [Venmo](#), [Cash App](#), and [PayPal](#) 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 Globally in 2021; Germany's N26 Saw an 18% Increase in Monthly Active Users YoY, 2X That of Revolut's

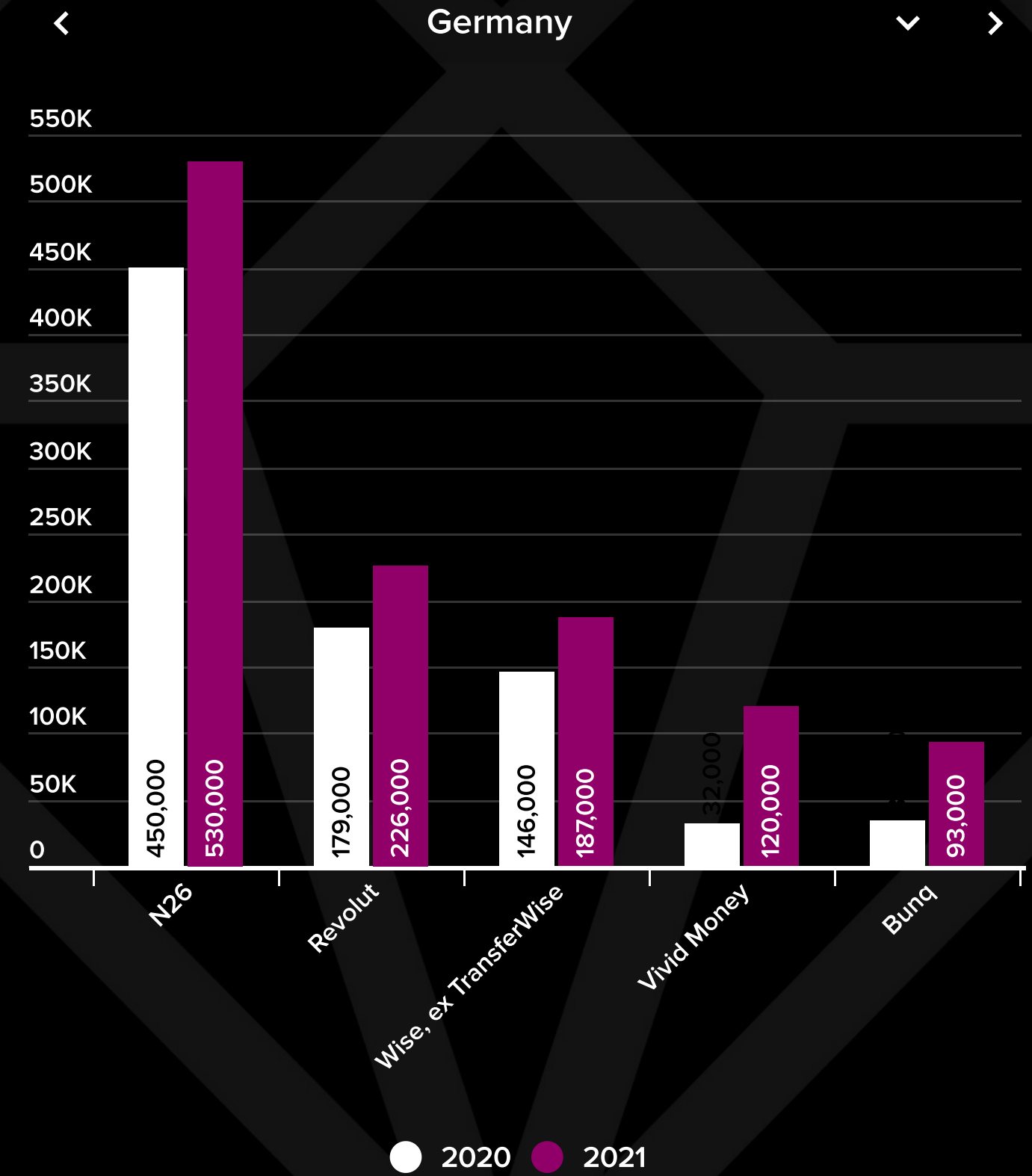
Most countries tend to use homegrown neobanks; Mexico is an exception, where *Brazil's Nubank* topped the charts across both countries.

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.

# 2021 Rankings by Market | Finance

< EMEAR - Breakout Downloads >

	United Kingdom	France	Germany	Russia	Turkey	Italy	Spain
1	 Binance	 Binance	 VR SecureGo Plus	 Tinkoff	 Binance	 Crypto.com	 Binance
2	 Crypto.com	 BLING	 Binance	 Binance	 Binance TR	 Binance	 Crypto.com
3	 Coinbase	 Paylib le paiement	 Trade Republic	 Tinkoff Investing	 Paribu	 Eni Live	 Verse
4	 eToro	 Coinbase	 PayPal	 MTC Банк (MTC Деньги)	 BtcTurk Pro	 Crédit Agricole Italia	 Unicaja Banco
5	 Zilch	 Trade Republic	 Crypto.com	 BTB Мои Инвестиции	 Papara	 Smart Bcard	 Trade Republic
6	 Virgin Money	 PayPal	 Coinbase	 Bank	 Bank	 Smart Banking	 Coinbase

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

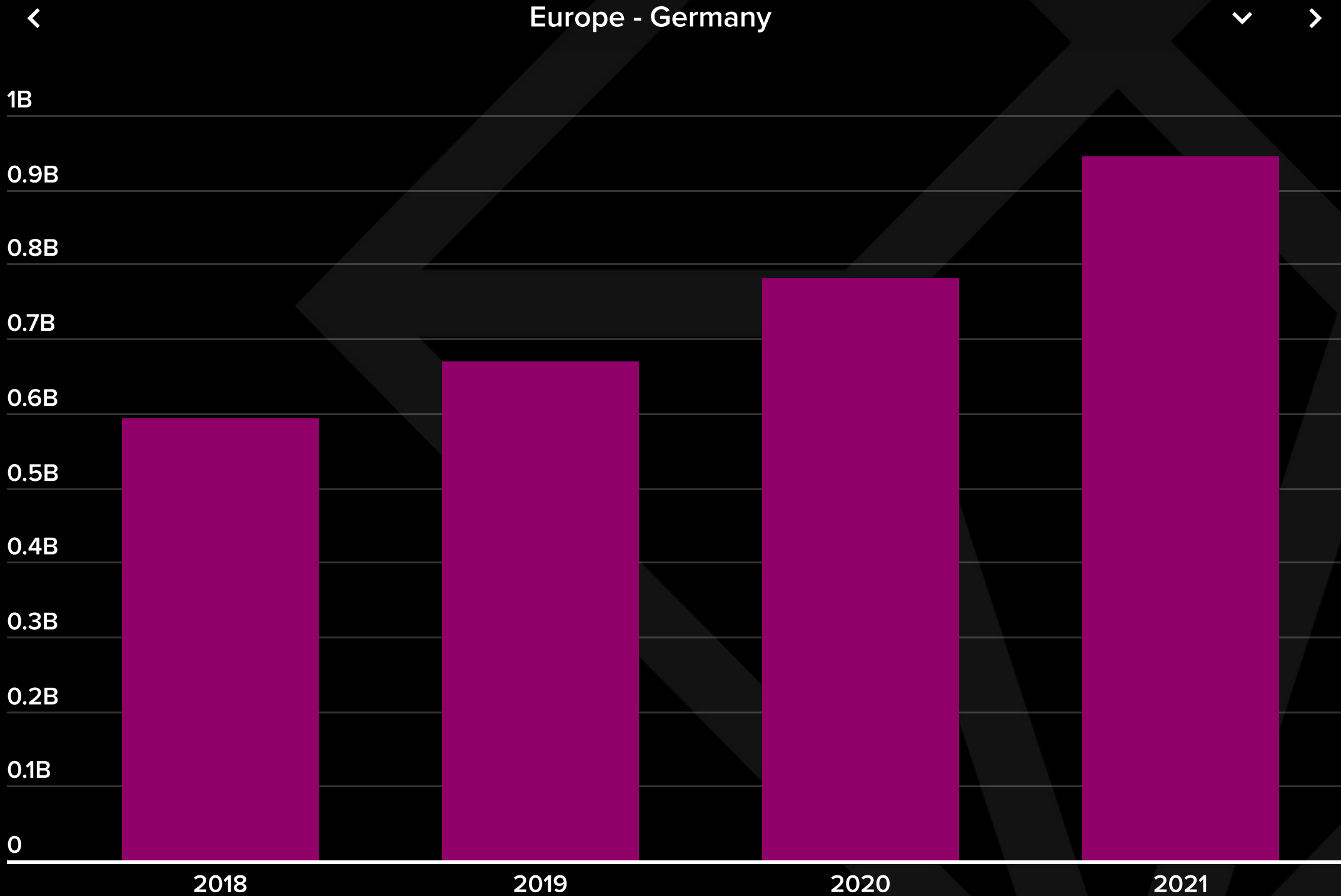
# Retail

We aim to inspire everyone with personalized and curated content, expert advice and best-in-class shopping experience for all things beauty. The Douglas app is the ideal driver on this way. With our data-driven approach, we are continuing to improve customer experience inline with our omnichannel platform approach. Live-Shopping, loyalty features and AI driven beauty advisory are our differentiator in the world of beauty ecommerce.

**Simone Grau**  
**Senior Manager App Acquisition**  
**Douglas**



Annual Hours Spent in Shopping Apps



Source: App Annie Intelligence  
Note: Android Phones

RETAIL

# Time Spent in Shopping Apps Reached Over 100B Hours Globally and 940M Hours in Germany

Time spent in Shopping apps rose 18% globally and 20% in Germany 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.

# 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.**
















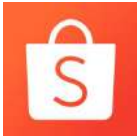










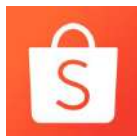

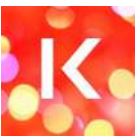











Going Global: Share of Shopping Downloads by Overseas-HQ'd Publishers



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

# 2021 Rankings by Market | Shopping

< EMEA - Breakout Downloads >

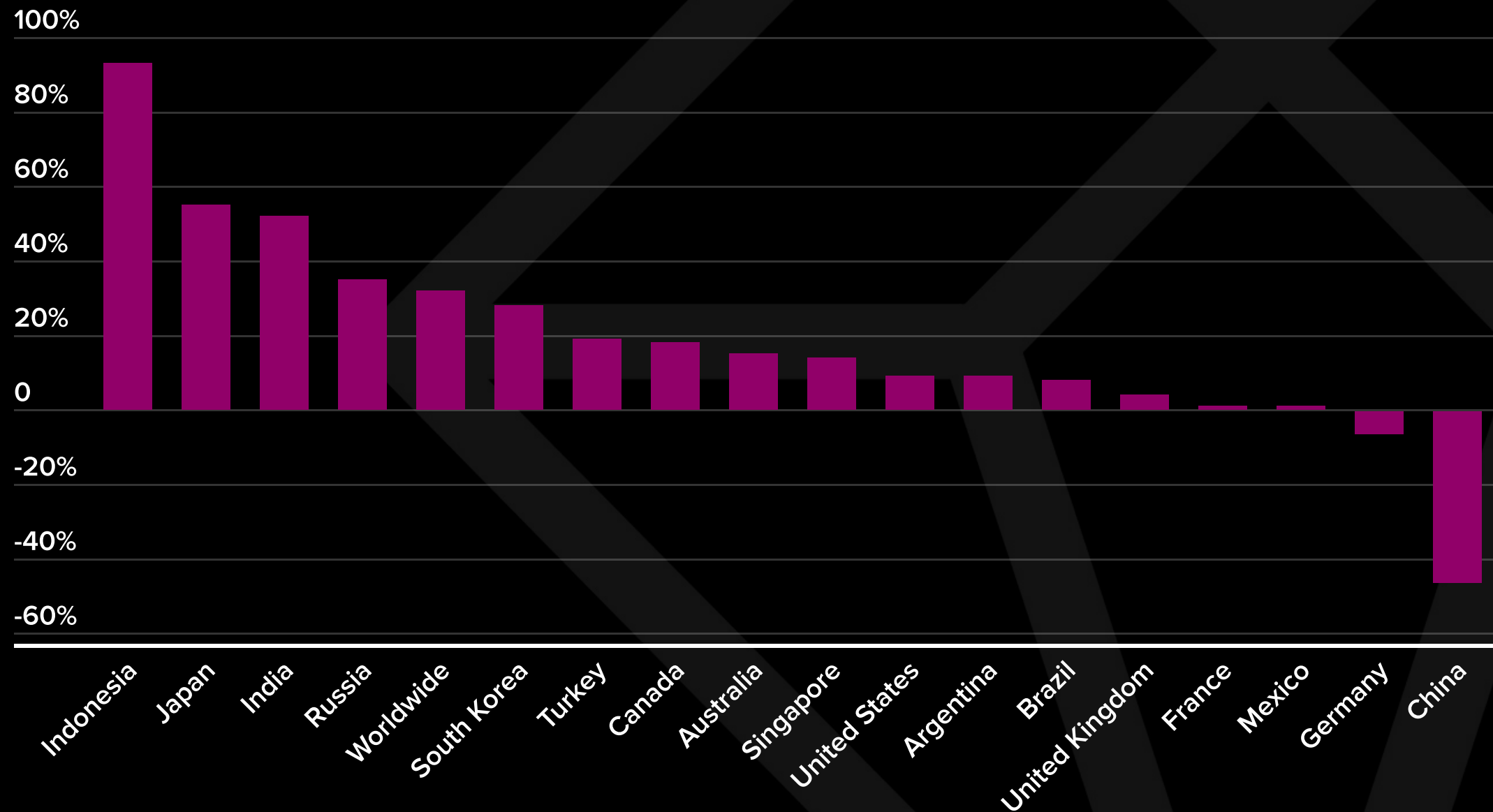
	Worldwide	United Kingdom	France	Germany	Russia	Turkey	Italy	Spain
1	 Meesho	 Vinted	 Lidl Plus	 Klarna	 AliExpress Russia	 getir	 Vinted	 ABOUT YOU
2	 Shopee	 Shop	 PatPat	 Flink: Lebensmittel in 10min	 SHEIN	 LC Waikiki	 Lidl Plus	 Shopee
3	 SHEIN	 getir	 ABOUT YOU	 Kaufland	 SberMegaMarket	 Cicek Sepeti	 ABOUT YOU	 SHEIN
4	 Alibaba.com	 Tesco Clubcard	 Shopee	 Gorillas	 KazanExpress	 istegelsin	 Wallapop	 GELT
5	 AJIO Shopping App	 Iceland Bonus Card	 Blush Mark	 PatPat	 Ikea	 Karaca	 Vestiaire Collective	 getir

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 32% 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, Japan, and India saw the highest increases in total hours spent across their video streaming apps in 2021, with *YouTube* 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.



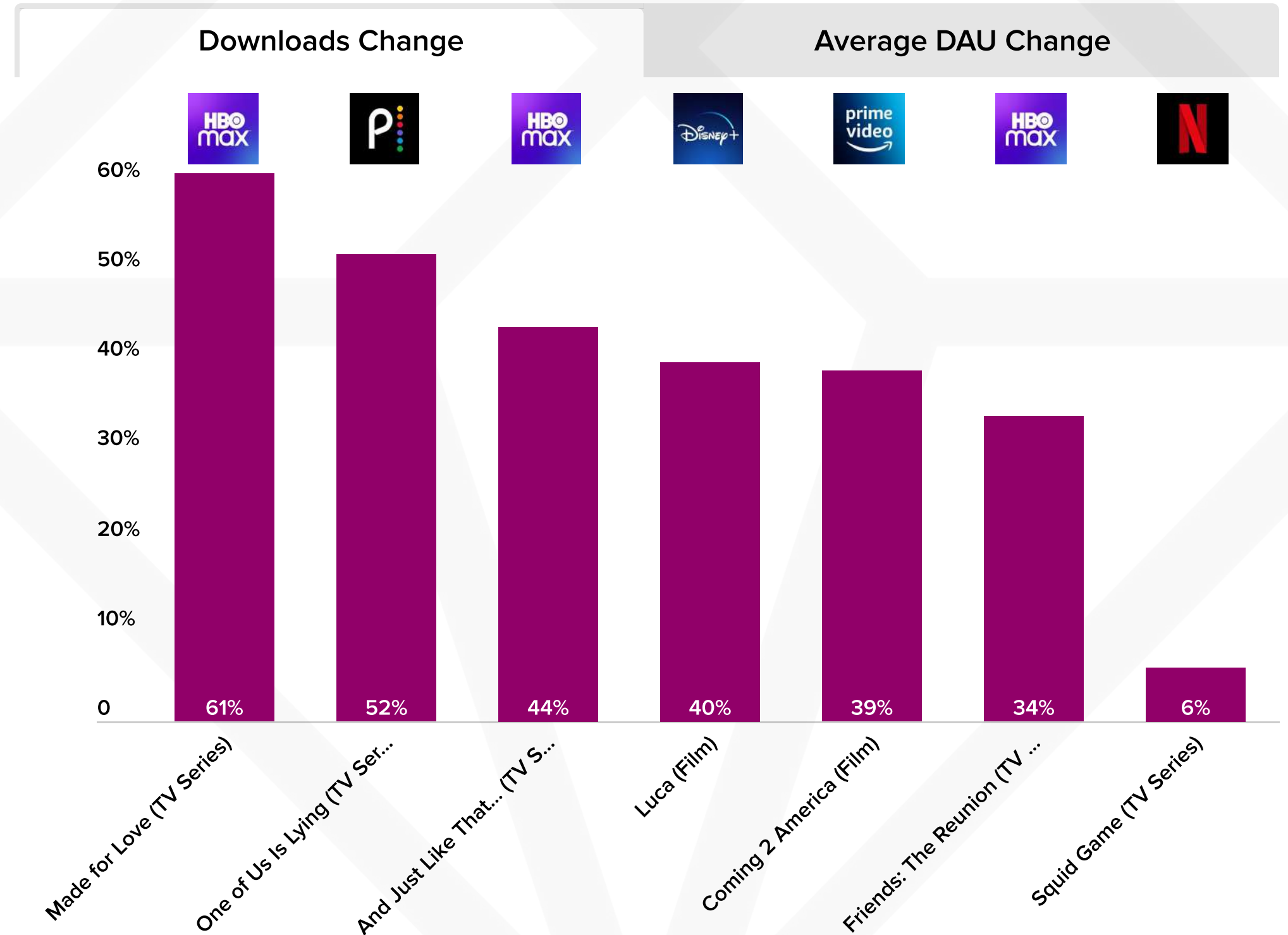
# Exclusive Content Releases Drive Spikes in Video Streaming App Downloads Amidst Increased Competition in 2021

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

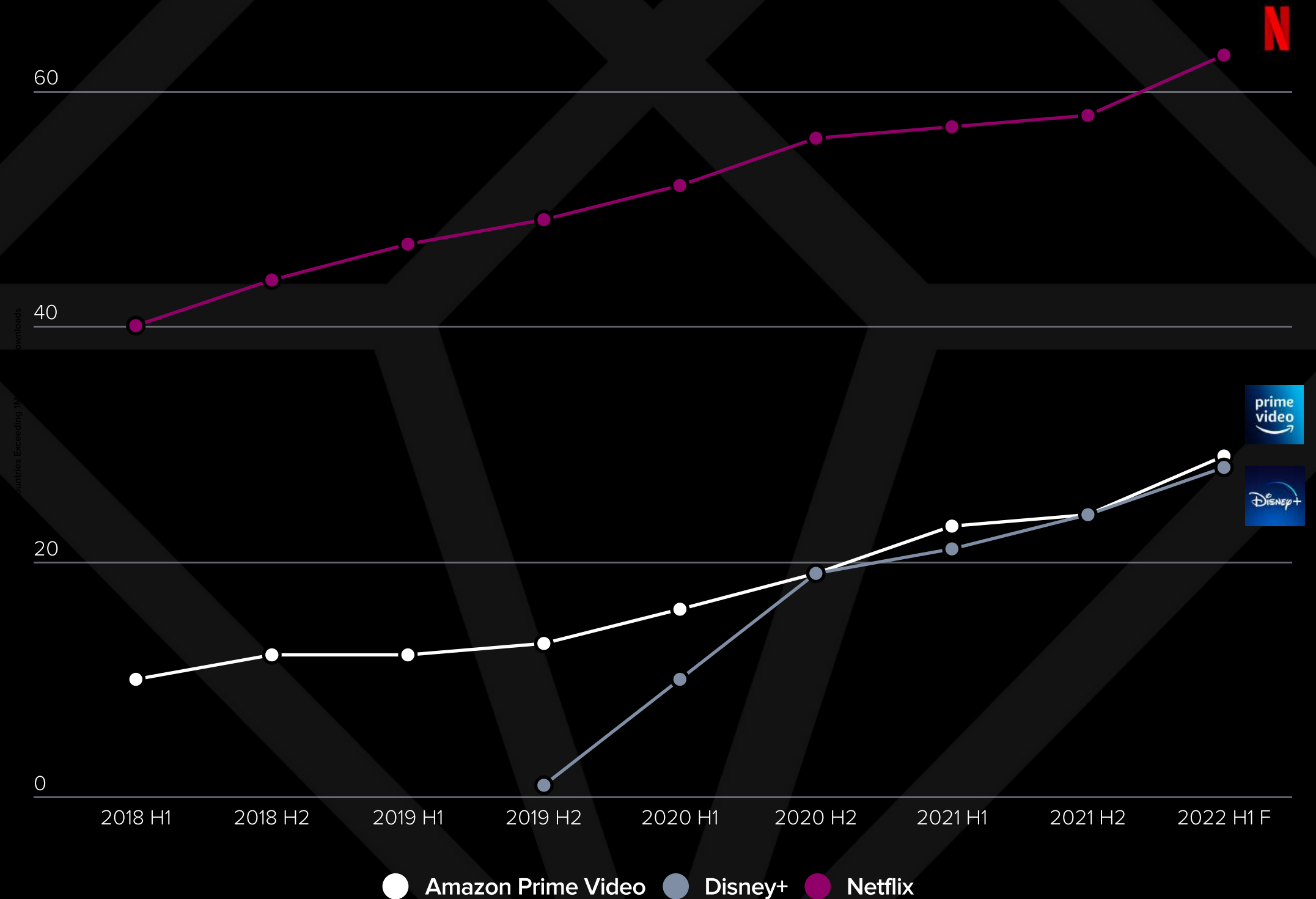
*Netflix* has the largest global footprint among video streaming platforms and a robust audience in each: with over 1 million local downloads in 60+ countries.

*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.**

Number of Countries With Over 1 Million Lifetime Downloads Among Select Top Streaming Apps



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

# 2021 Rankings by Market | Video Streaming

< EMEA - Downloads >

	Worldwide	United Kingdom	France	Germany	Russia	Turkey	Italy	Spain
1	YouTube	YouTube	Netflix	Netflix	Kinopoisk	Netflix	Amazon Prime Video	Amazon Prime Video
2	Netflix	Disney+	Amazon Prime Video	Amazon Prime Video	YouTube	Exxen	RaiPlay	Netflix
3	Amazon Prime Video	Netflix	Disney+	YouTube	Okko	YouTube Kids	Netflix	Disney+
4	Disney+	Amazon Prime Video	YouTube	Disney+	IVI	YouTube	MEDIASET	Twitch
5	YouTube Kids	BBC iPlayer	Twitch	Twitch	YouTube Kids	Nimo TV	Disney+	Pluto.tv

**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 white square.

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

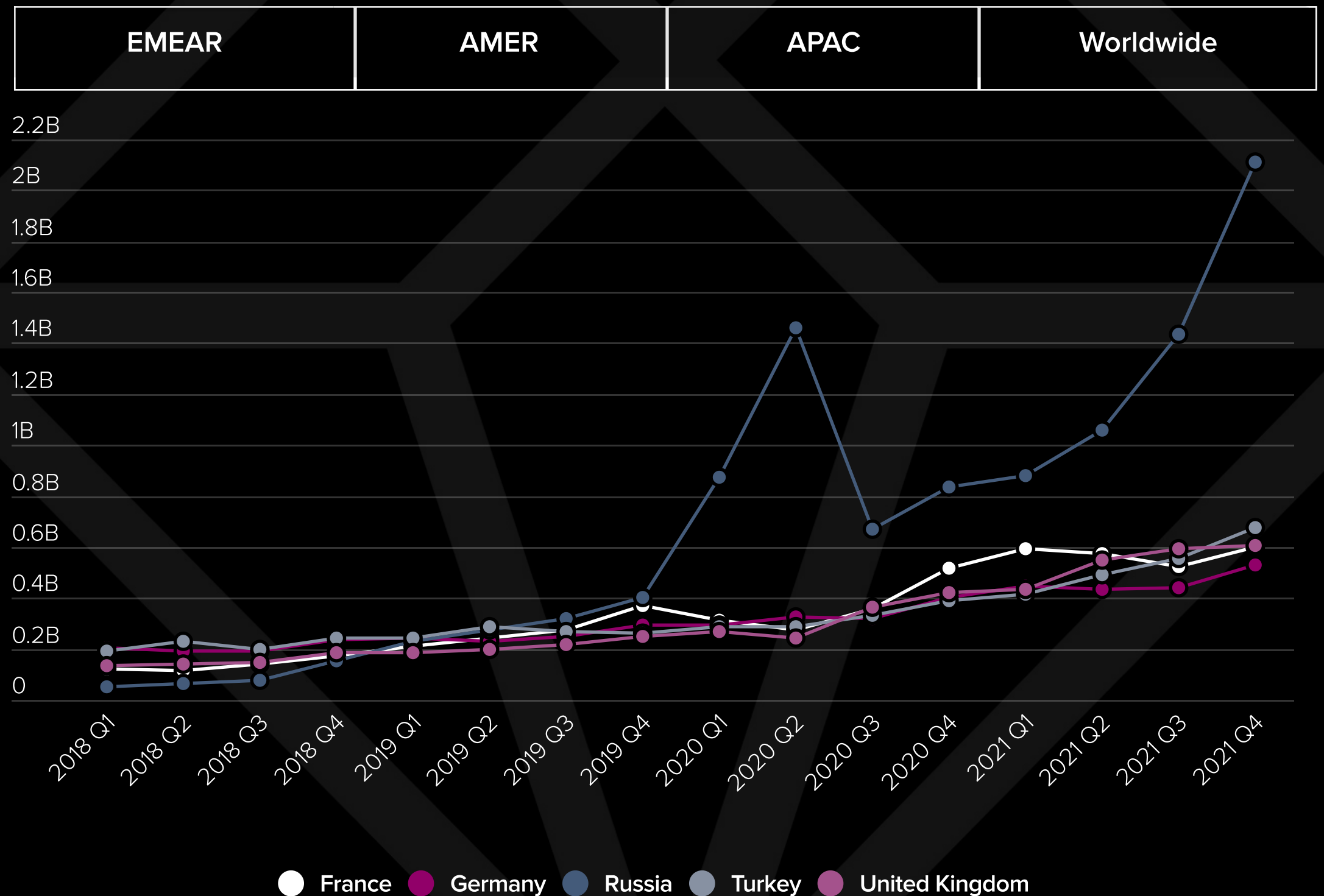
The pandemic expedited usage of Food & Drink apps across the world. Despite concerns for a slowdown following regional re-openings, an increase in both supply and in demand pushed market growth further than ever. In Germany, users spent 37% more sessions YoY in 2021 in Food & Drink apps.

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.**

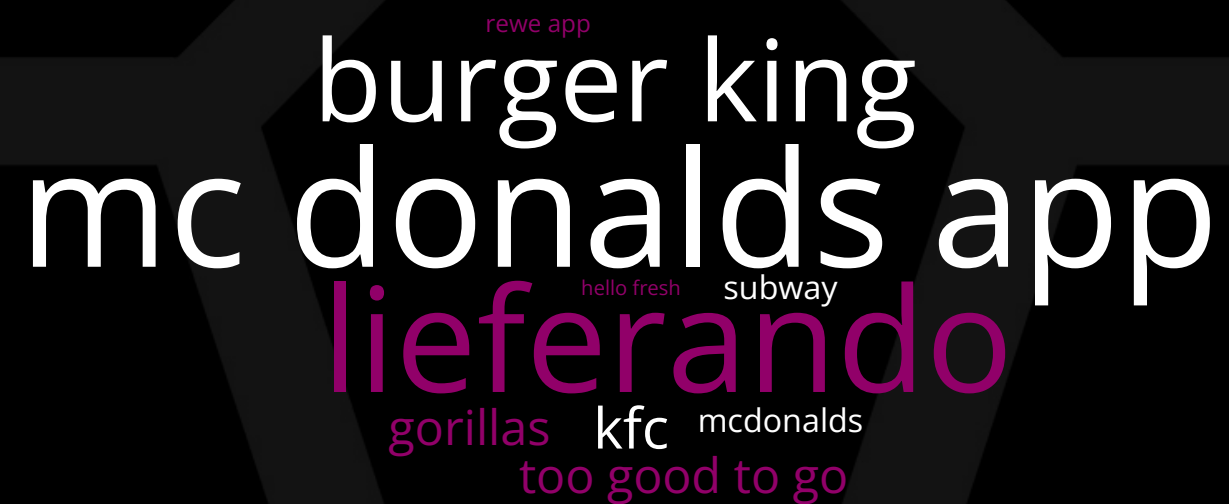
Quarterly Sessions Spent in Food & Drink Apps Growth Over Time



Source: App Annie Intelligence  
Note: Android Phones

Top Keywords by iOS Search Volume  
Among Food & Drinks Apps

< Germany >



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 Germany, the top searched terms were evenly split between branded food delivery keywords and Quick Service Restaurant brand names, indicating that users are more likely to search based on brand association in the region. By comparison, 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

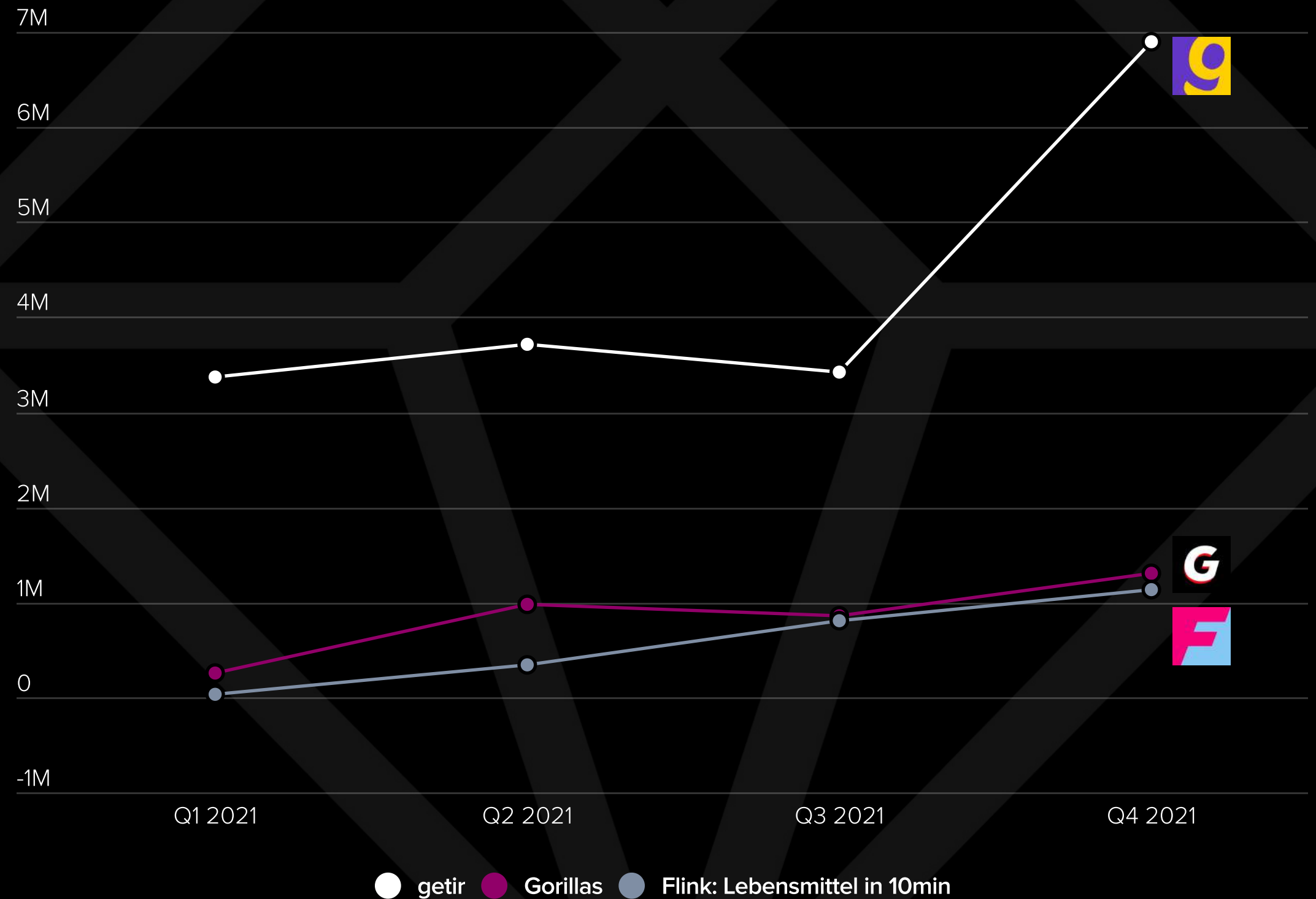
In 2020, consumers wanted delivery. In 2021, consumers wanted delivery...now. Hyper-fast grocery delivery apps grew at speeds faster than their delivery times.

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.

Germany-based Gorillas and 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

	EMEA - Downloads							
	Worldwide	United Kingdom	France	Germany	Russia	Turkey	Italy	Spain
1	 UberEATS	 UberEATS	 UberEATS	 Lieferando	 Pyaterochka	 Yemeksepeti	 Too Good To Go	 McDonald's App
2	 Zomato	 McDonald's UK	 McDo France	 McDonald's Germany	 McDonald's Russia	 Tikla Gelsin®	 McDonald's App	 Too Good To Go
3	 McDonald's App	 Deliveroo	 Deliveroo	 Burger King Germany	 Delivery Club	 Domino's Pizza Turkey	 Deliveroo	 BURGER KING Spain
4	 foodpanda - food delivery	 Just Eat UK	 Too Good To Go	 Too Good To Go	 Camokat	 Starbucks Turkey	 Just Eat Italy	 UberEATS
5	 DoorDash	 Too Good To Go	 Jow	 REWE	 Sbermarket	 Nefis Yemek Tarifleri	 Burger King Italia	 Just Eat Spain
	 Gmh		 BURGER KING			 KÖFTECİ UICIC		

[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

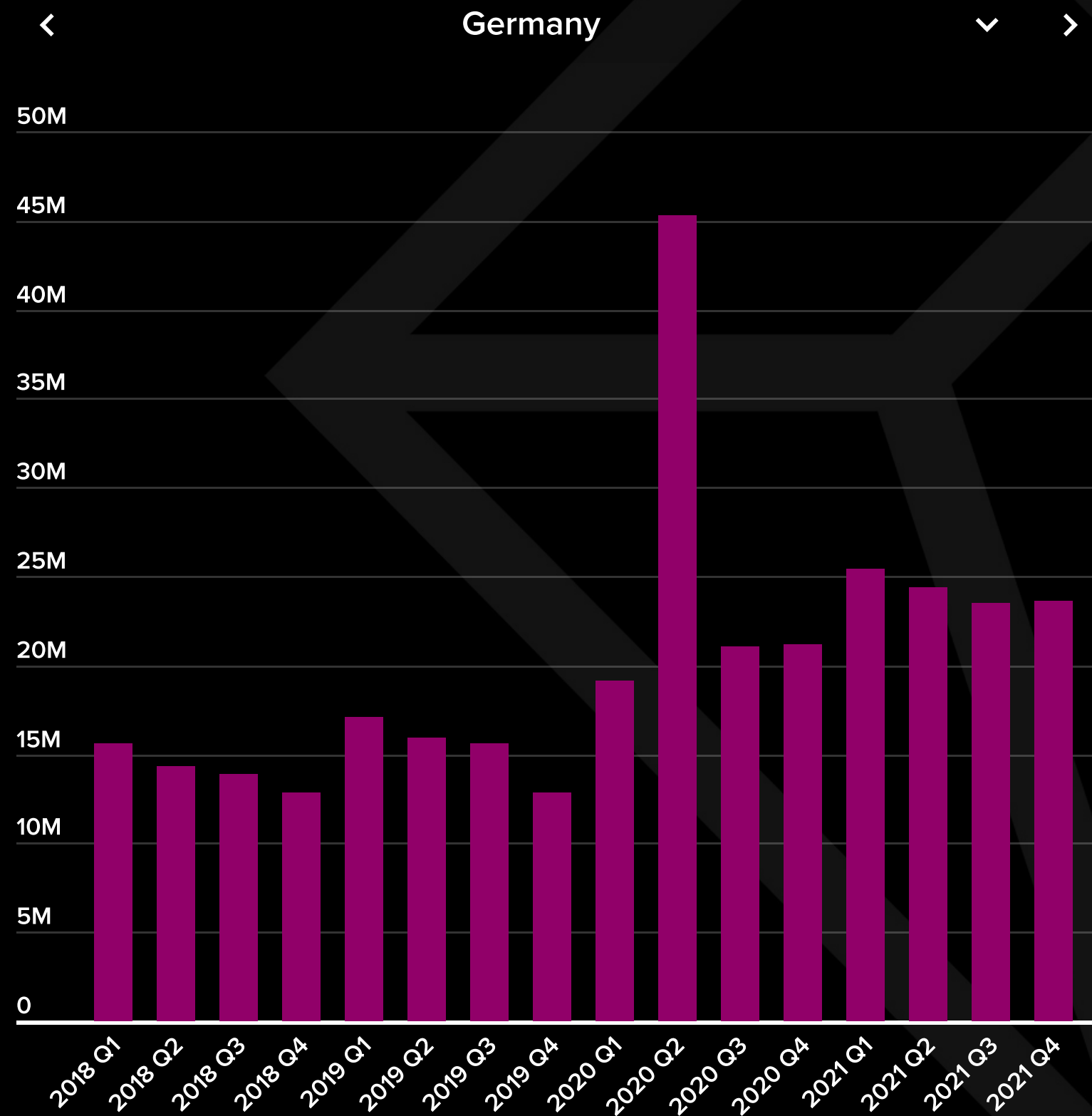
With komoot, people find, plan, and share outdoor adventures. As the most successful platform in Europe, it is important for us to understand the mobile ecosystem in the new markets we are entering. App Annie is a reliable source of data that helps us to monitor our success with detailed metrics beyond downloads.

**Markus Hallermann**  
CEO & Co-founder,  
komoot



Quarterly Health and Fitness App Downloads by Country

HEALTH & FITNESS



# Germany's 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 Feminine Health Apps More Likely Used Among Gen Z

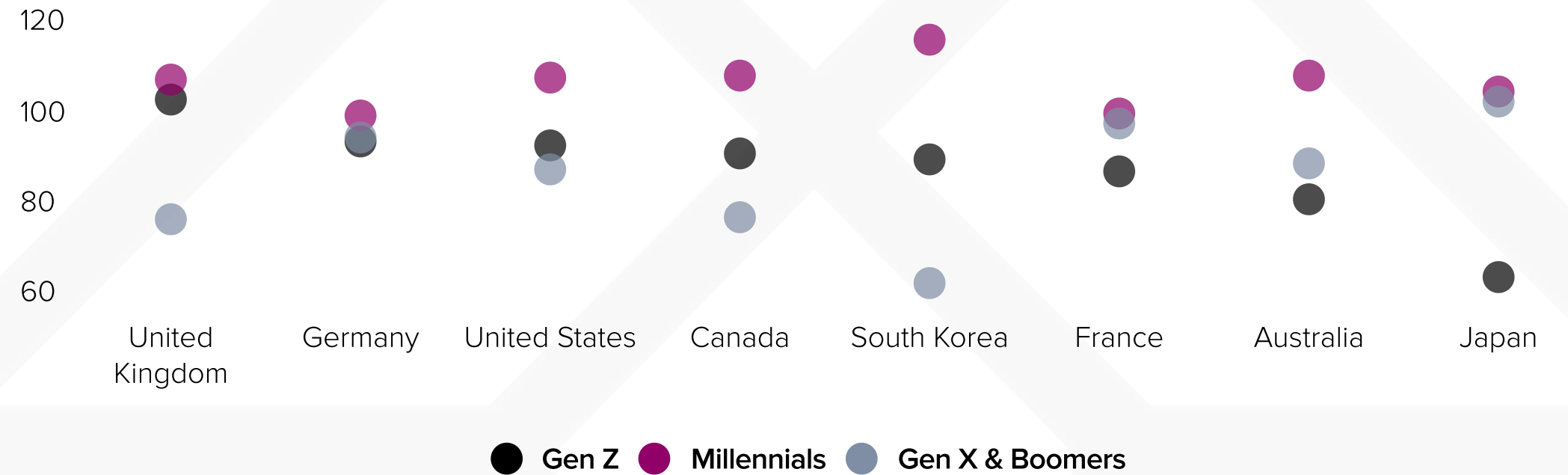
The most differences in generational use of Health & Fitness apps emerged in South Korea, with the least in Germany.

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.](#)

Average Age Group Index Among Top Health & Fitness Apps Per Country

Index >100 Skews Towards Demographic Group



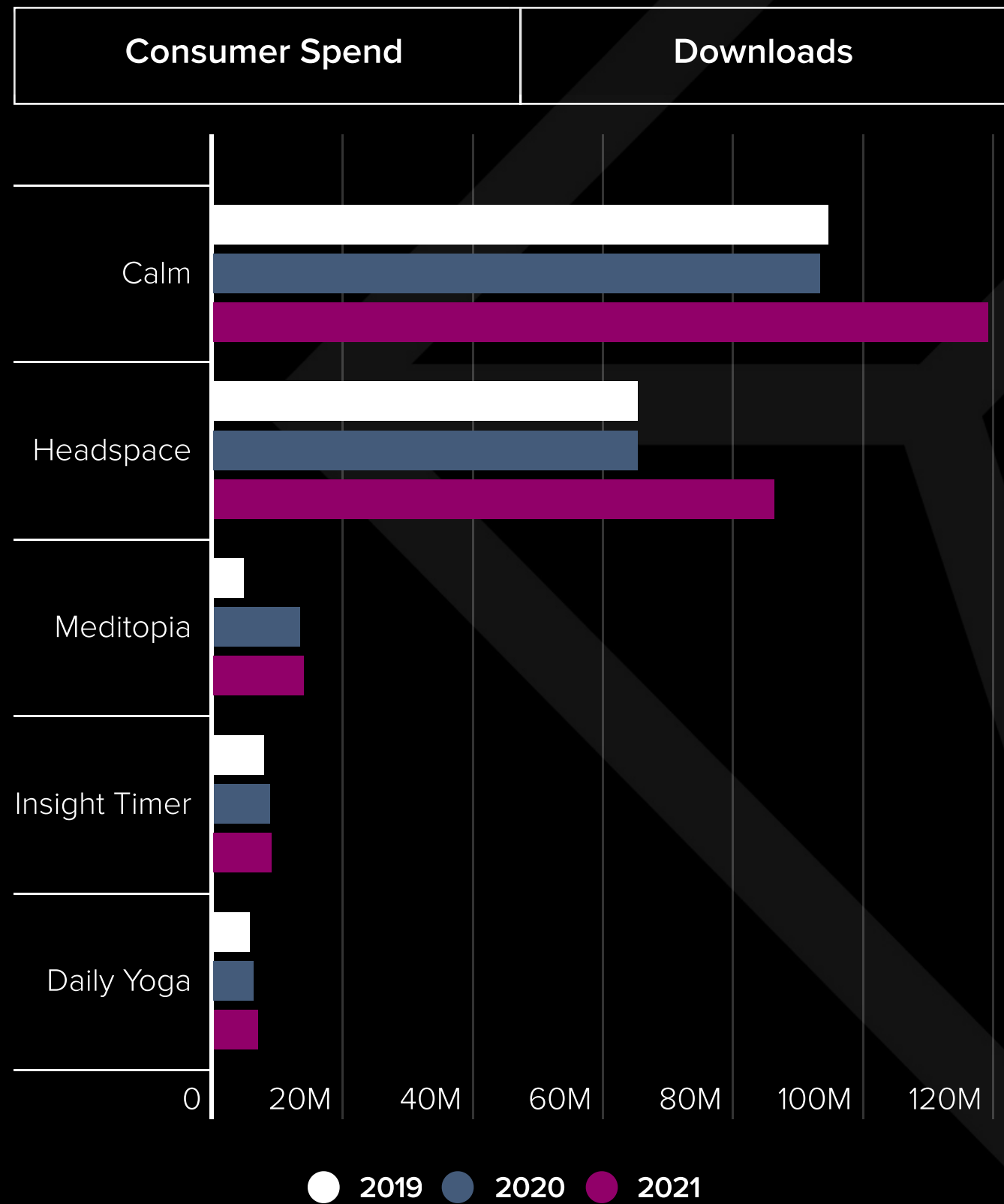
Top Apps by MAU by Likelihood of Use

Germany

Gen Z	Millennials	Gen X & Baby Boomers
1 Clue - Period Tracker	1 ABISHKING Period Calendar	1 CovPass Check
2 Flo Period & Ovulation Tracker	2 Strava Running and Cycling	2 komoot
3 ABISHKING Period Calendar	3 Mi Fit	3 Step Counter
4 Calorie Counter by YAZIO	4 Die TK-App	4 Garmin Connect
5 Runtastic Running & Fitness	5 Calorie Counter by YAZIO	5 Huawei Health

Source: App Annie Intelligence Note: 2021, Android phones; Average of Top 20 apps by MAU within the Health & Fitness 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+

Consumer Spend & Downloads Among Top Most Downloaded Meditation Apps Worldwide



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

HEALTH & FITNESS

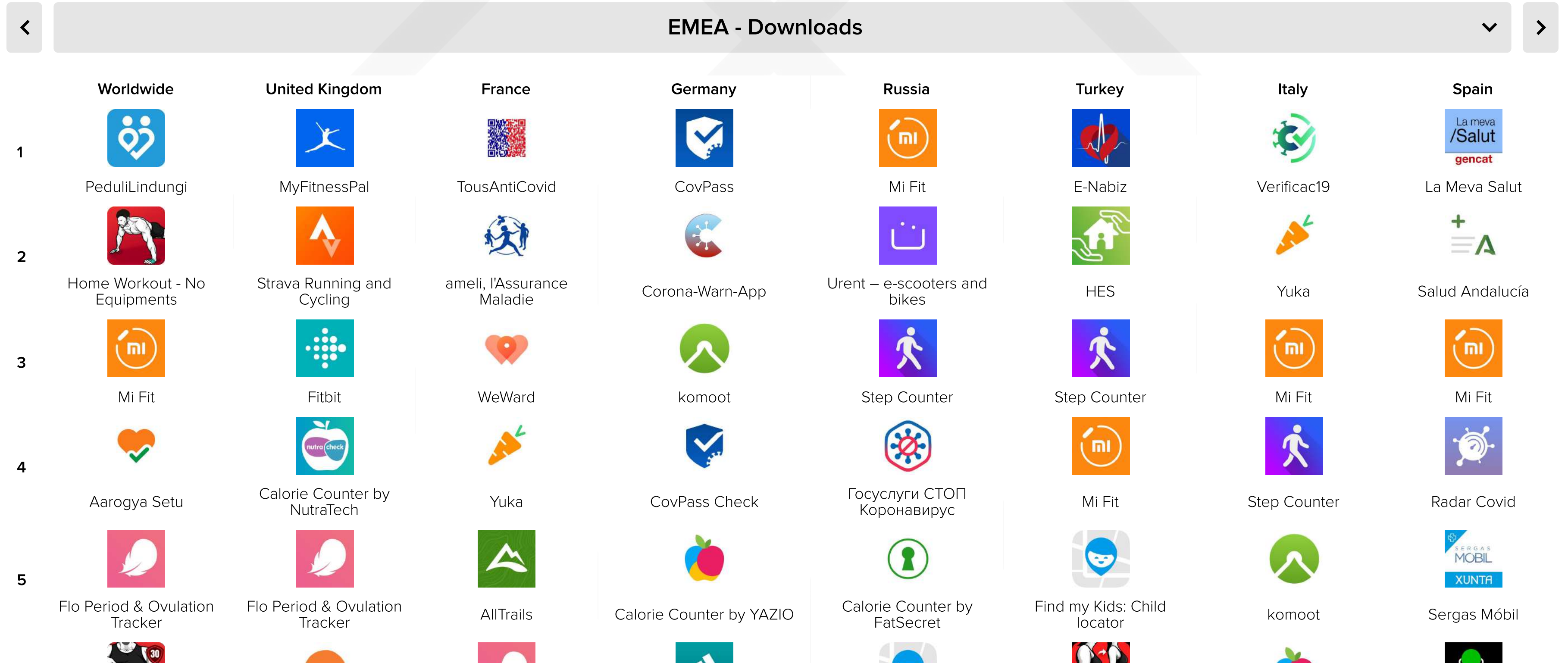
# The Top 5 Downloaded Meditation Apps Saw 25% Growth YoY in Consumer Spend Following Record Downloads in 2020

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



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

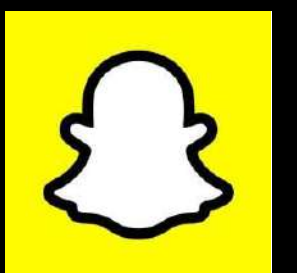
Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

# 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

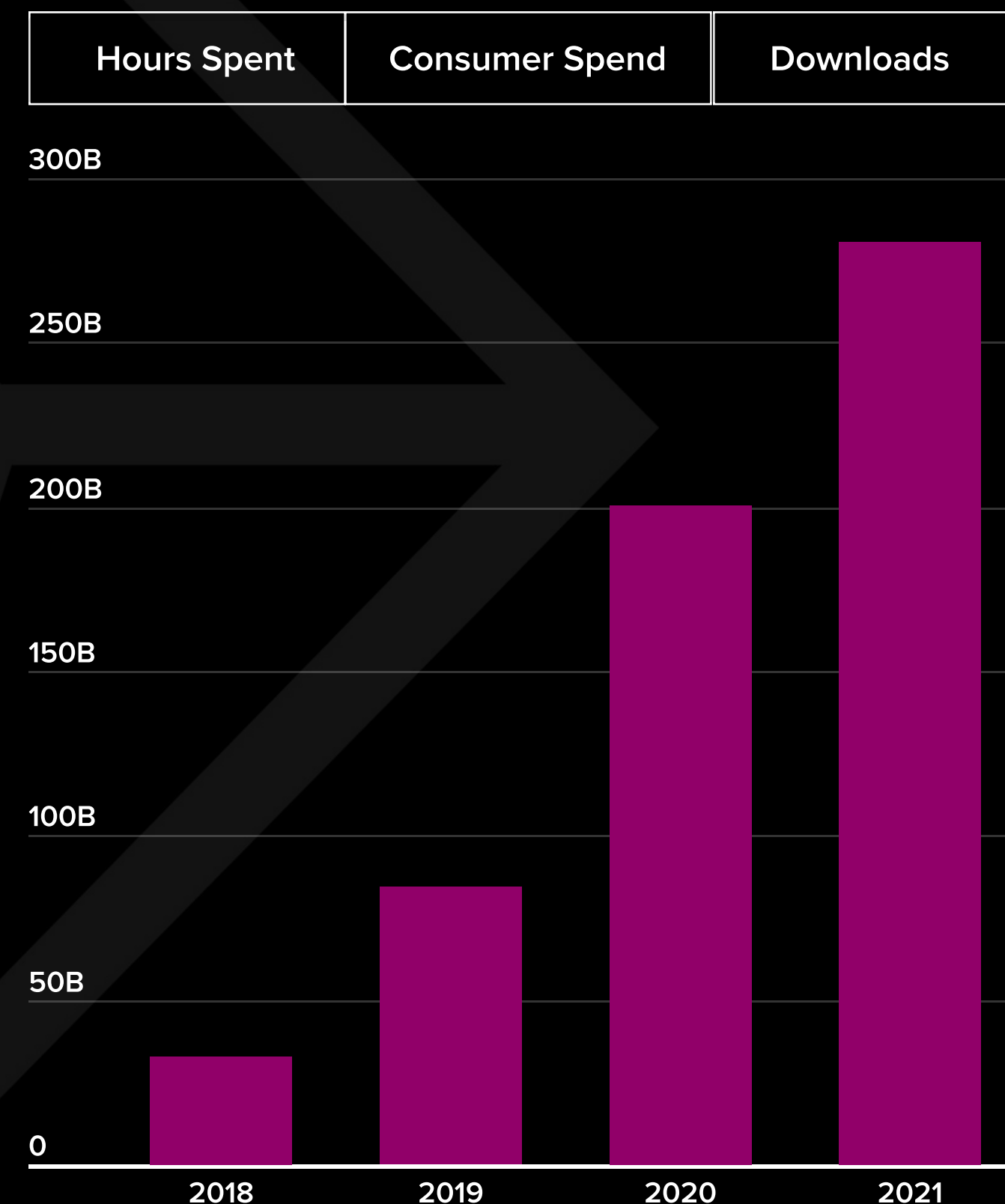
# All Eyes on Live Streaming: Time Spent Grew 9x in 4 Years — Cultivating the Deepest Social Engagement

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.**

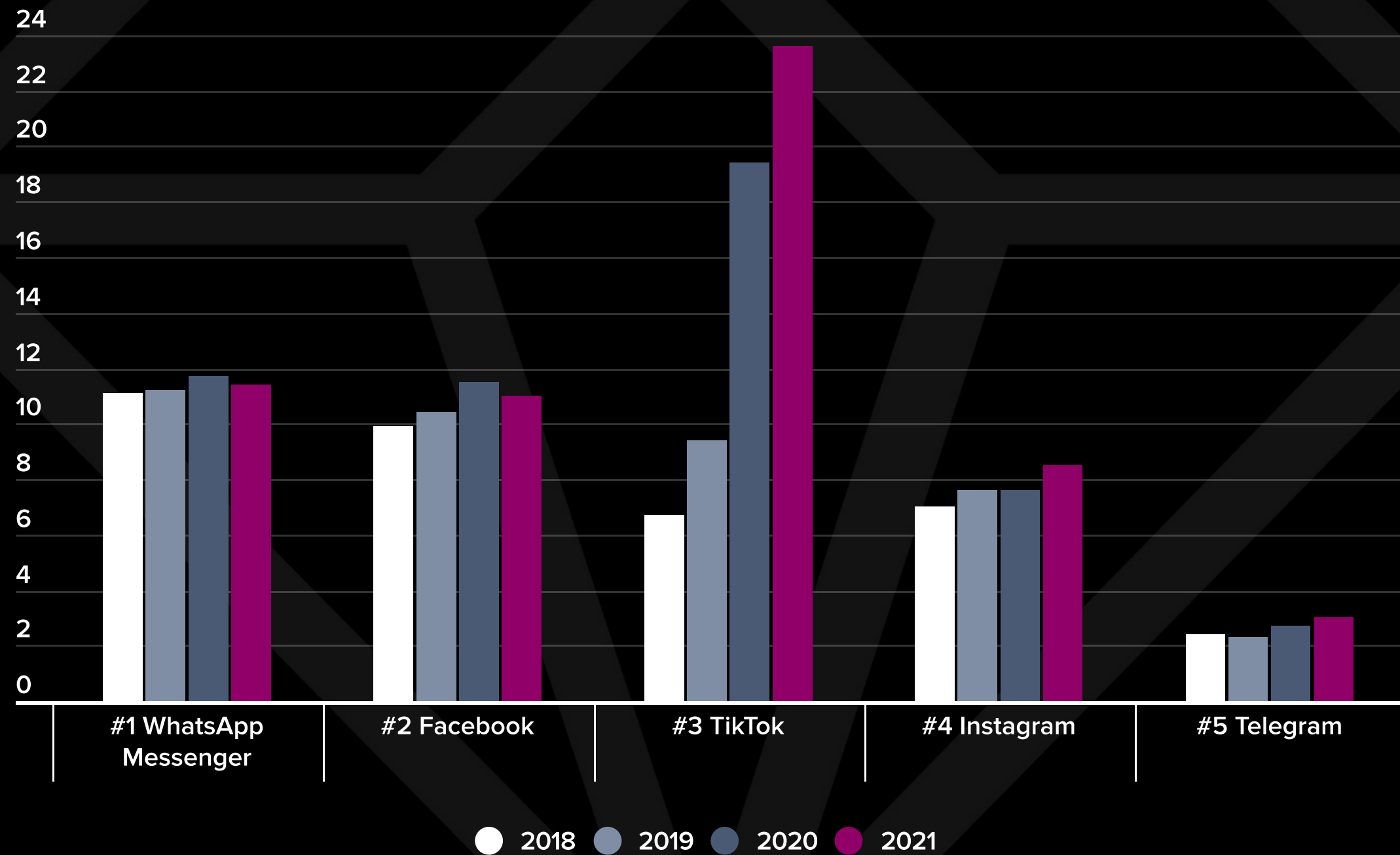
Global Growth of Live Streaming Apps  
Among Top 25 Apps



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

Germany



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.

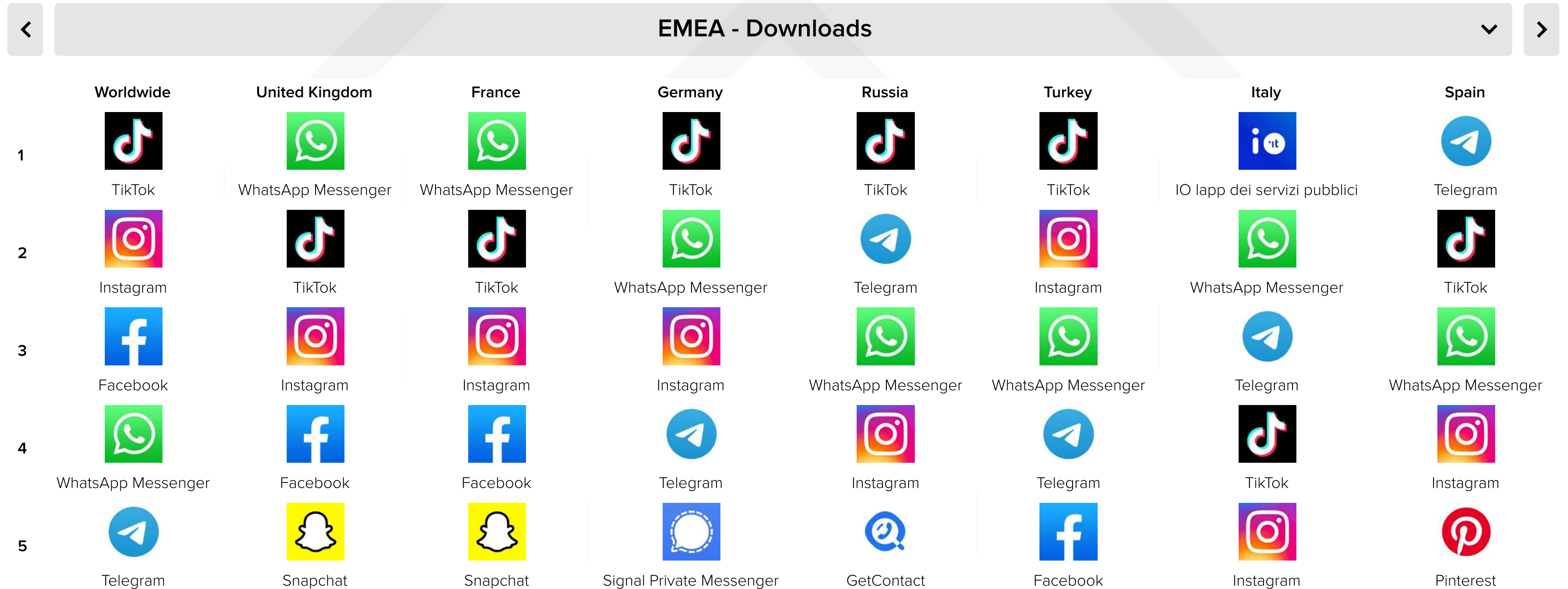
It is notable that *TikTok* has seen the greatest in depth of engagement over 4 years and had a standout year in 2021, off the back of an already record-breaking 2020.

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.**



# 2021 Rankings by Market | Social



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

With our constant expansion into new markets and increasing variety of different mobility types and providers on our platform (from ride-hailing over car-sharing, emopeds, ebikes to scooters) comes an ever-increasing need for understanding market conditions and competitor operations. AppAnnie is our one-stop-solution to gather insights and answers to these questions, especially with its depth of information on city level! All these insights help us to improve our service on a daily basis to provide a truly enjoyable, sustainable and customised urban mobility experience in every European neighbourhood.

**Tim Wiegels**  
**VP Data**  
**Free Now**



# Downloads of Travel Apps Rebound by 25% YoY in Germany, Driven by Sharp Increases in Summer

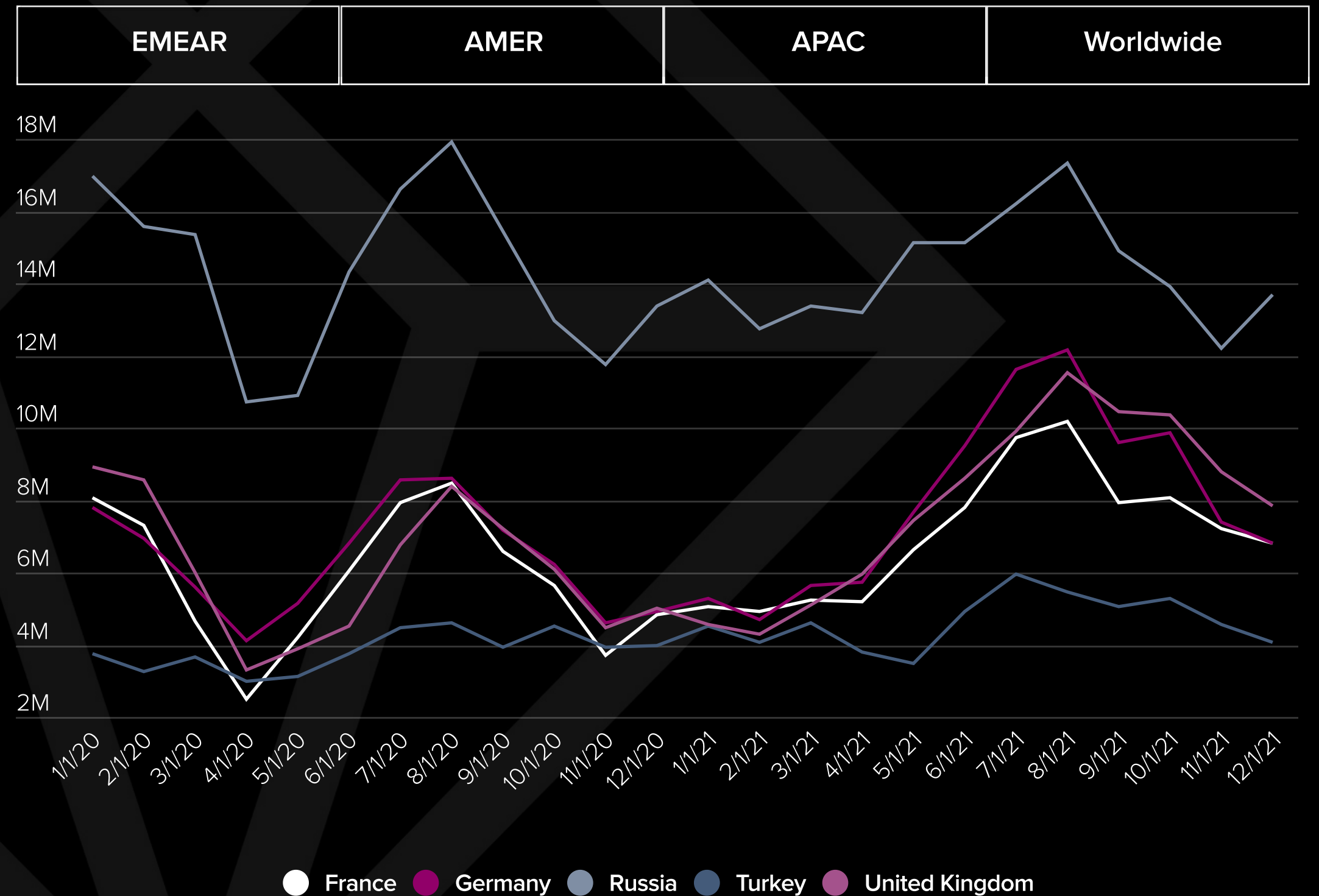
The second half of 2021 showed positive trends for travel on mobile. H2 2021 downloads hit 1.95 billion worldwide, nearing pre-pandemic levels of 2.08 billion in H2 2019.

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.**

Monthly Downloads of Travel & Navigation Apps



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

# Omio's App Downloads in Germany Increased In-Line With Improved ASO Strategy

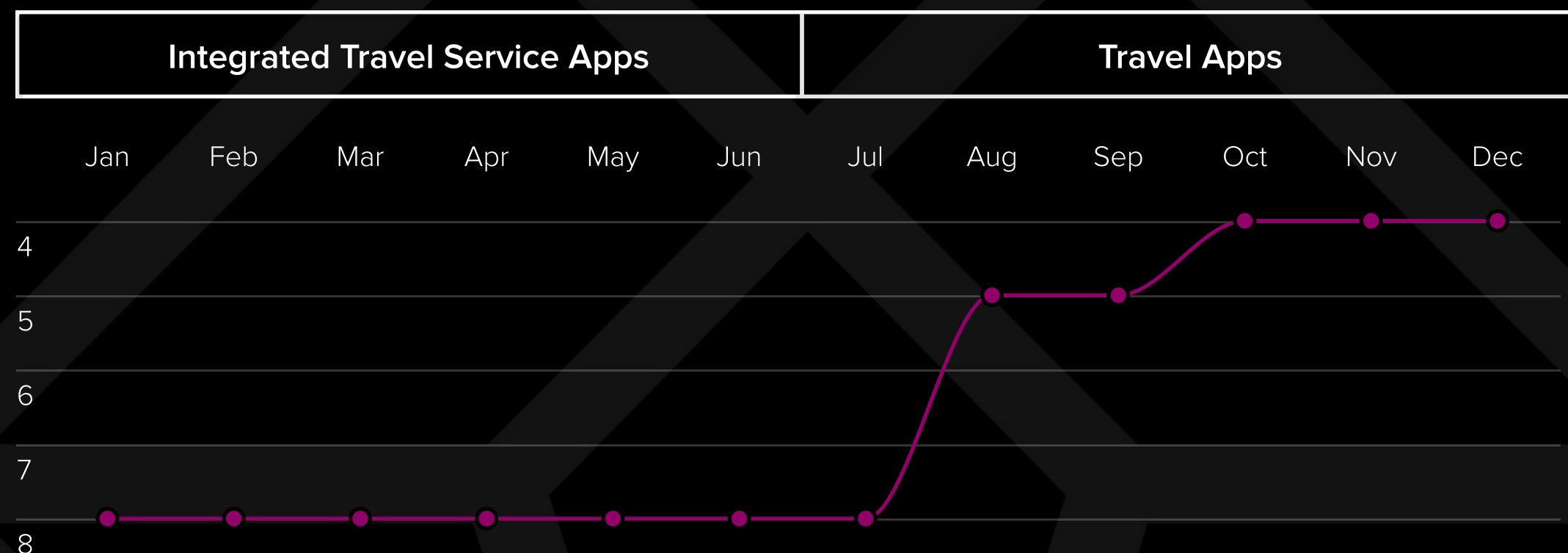
Omio, a travel app headquartered in Berlin that helps travelers from 130+ countries explore Europe, the US and Canada, brings together more than 1,000 transportation providers in a single digital location.

Omio optimized for search intent and saw increases in the app's position in search results in Q3 2021. It appeared higher up in broad keyword searches such as "ticket" and "bus", coinciding with an increase in app downloads in Germany since July.

Read more about how Omio and App Annie are partnering together in the [case study](#).

**Search behavior is constantly changing. Track ASO keyword lists and rankings in App Annie to understand how you rank against competitors and uncover customer intent.**

2021 Omio Downloads Rank by Category, Germany



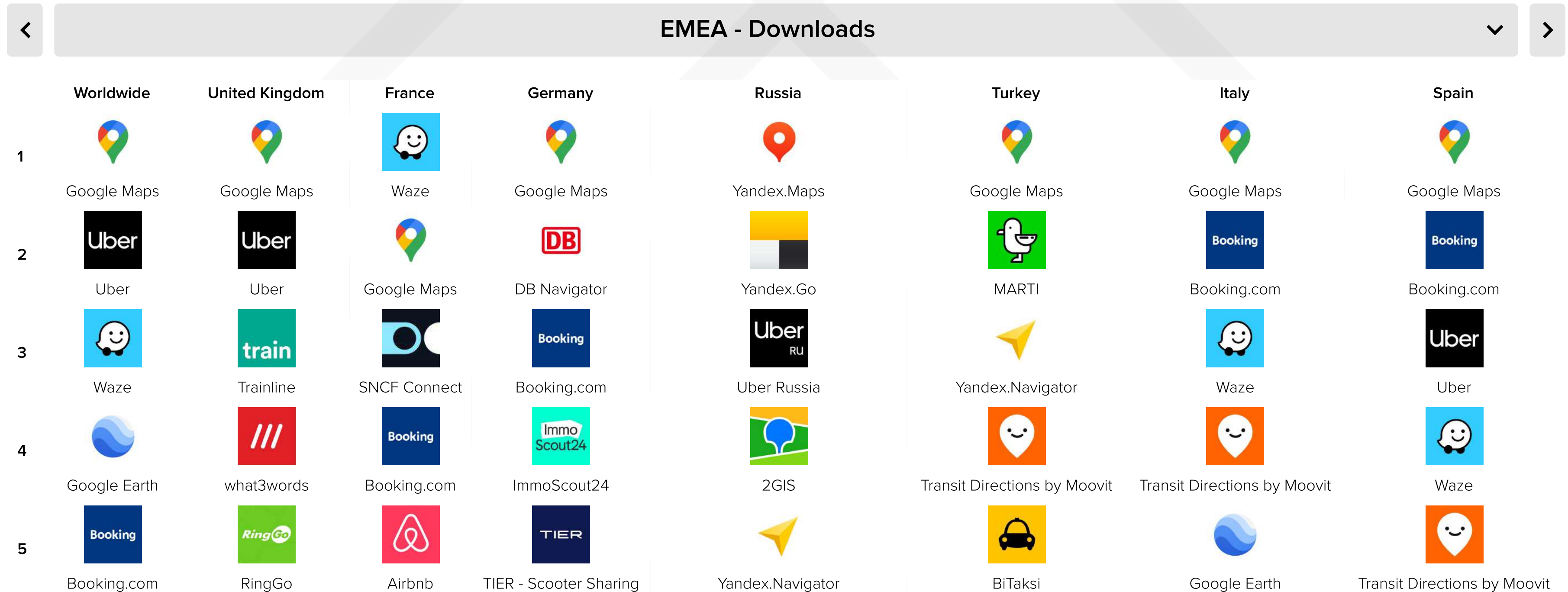
Omio's Keyword Ranks Across Top 15 Search Terms, Germany

Q1 2021 Keyword	Omio Keyword Rank	Q2 2021 Keyword	Omio Keyword Rank	Q3 2021 Keyword	Omio Keyword Rank	Q4 2021 Keyword	Omio Keyword Rank
omnio	1	omnio	1	omnio	1	omnio	1
from a to b	1	from a to b	1	omio	1	omio	1
omio	1	omio	1	from a to b	2	from a to b	2
rome2rio	2	interrail	2	trainline	3	rome2rio	2
trainline	3	rome2rio	2	interrail	3	trainline	3
interrail	4	trainline	3	flixbus	3	flixbus	4
flixbus	4	flixbus	3	blablabar	3	blablabar	4
flixtain	5	flixtain	3	rome2rio	3	rail planner	4
flug	10	flug	4	testflight	4	flixtain	4
trenitalia	11	trenitalia	8	flixtain	4	interrail	8
ryanair	15	blablabar	9	ticket	5	trip com	8
ticket	16	rail planner	13	bus	6	flug	9
snof	18	ryanair	14	citymapper	6	ticket	11

Source: App Annie Intelligence

Note: Download ranks across iOS and Google Play, Germany. Keyword Rank across Android devices shows the Omio app's position in the search results for each keyword at that point in time.

# 2021 Rankings by Market | Travel



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

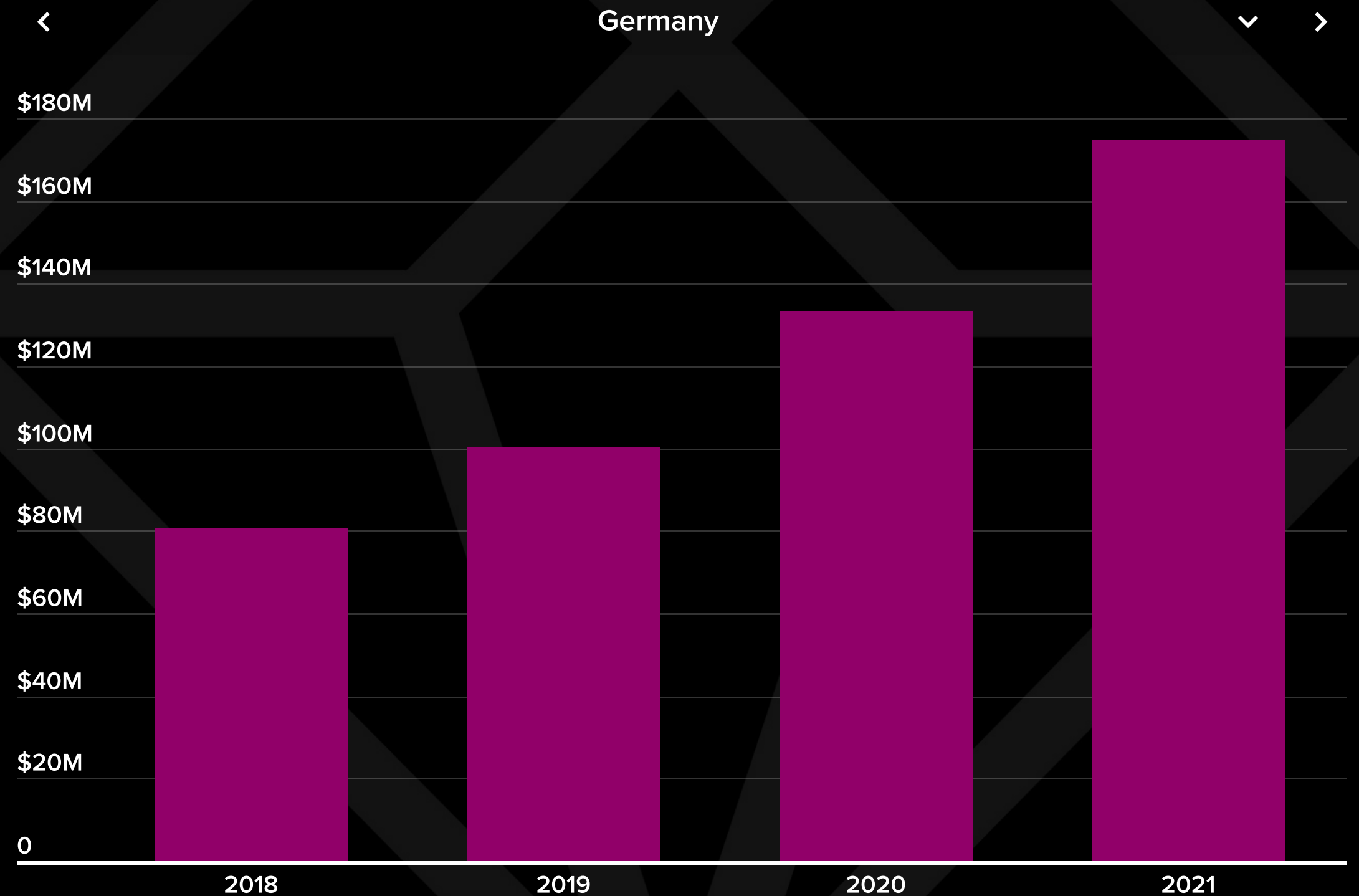
# German Consumer Spend on Dating Apps Surged Past \$170M in 2021, Seeing an 115% Increase Since 2018 Despite the Pandemic

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

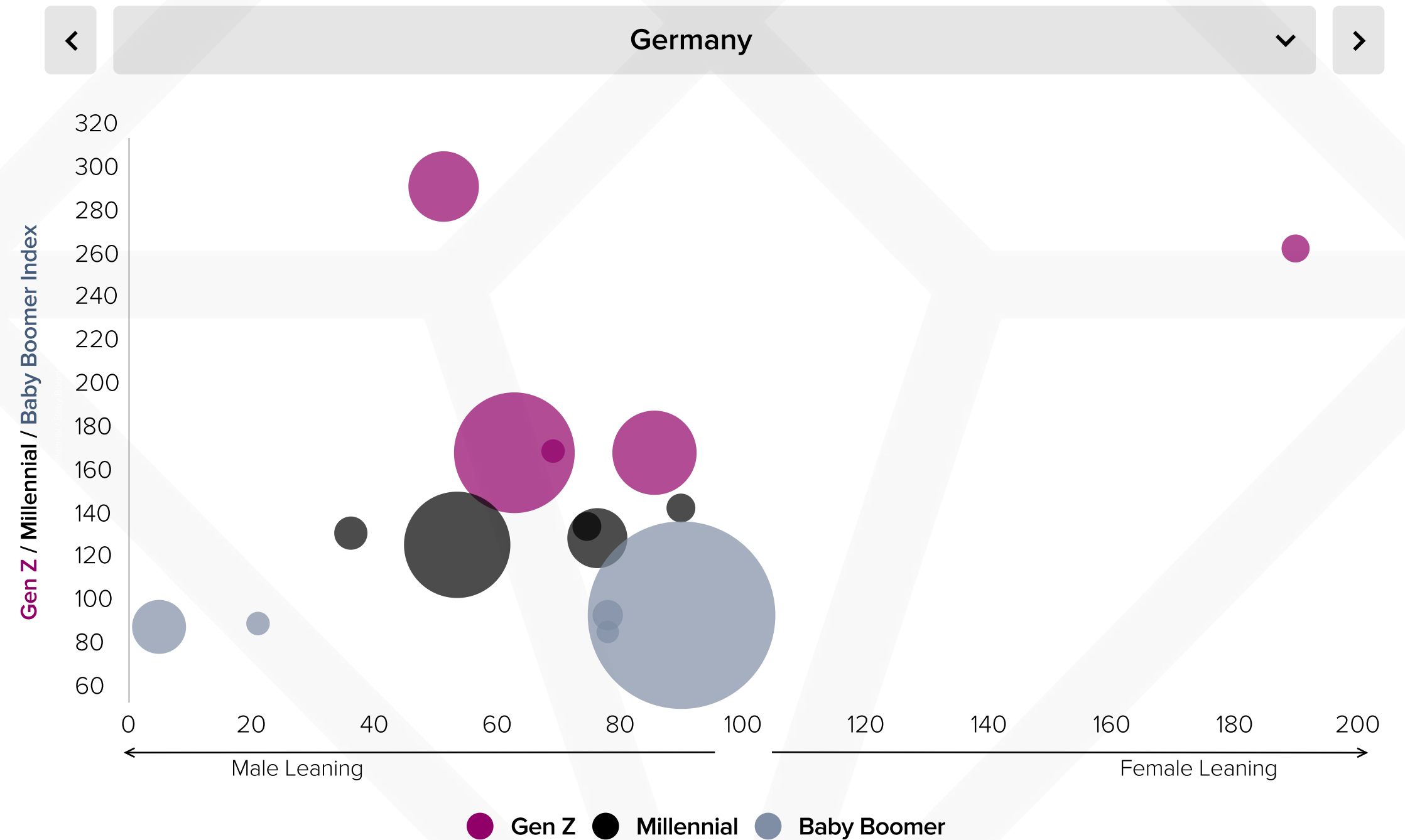
Azar, Bumble, and Germany-based LOVOO tend to be more popular among Gen Z in Germany.

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

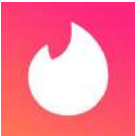
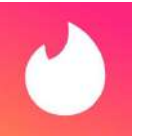
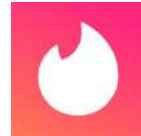
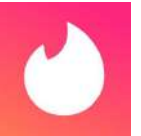



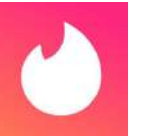


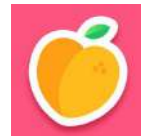


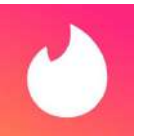

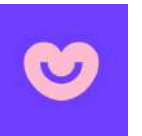


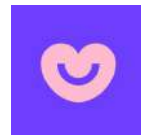








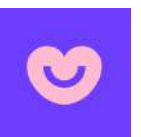
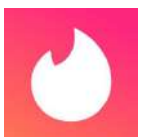
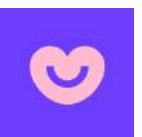



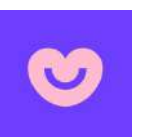




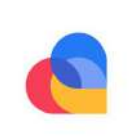
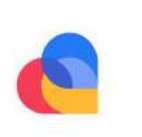


Source: App Annie Intelligence Note: 2021, iPhone and Android phones; Gen Z represented by those aged 16 -24; Millennials represented by those aged 25-44; Gen X / Baby Boomers represented by those aged 45+; Top 5 Dating apps by Demographics Index (a measure of demographic cohort compared to the overall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



# 2021 Rankings by Market | Dating

< EMEA - Downloads >

	Worldwide	United Kingdom	France	Germany	Russia	Turkey	Italy	Spain
1	 Tinder	 Tinder	 Tinder	 Tinder	 Badoo	 Azar	 Tinder	 Tinder
2	 Badoo	 Bumble App	 Fruitz	 LOVOO	 Chatruletka	 Tinder	 Badoo	 Badoo
3	 CuteU	 Hinge	 Badoo	 Bumble App	 Mamba Dating	 CuteU	 Azar	 Azar
4	 Azar	 POF Online Dating	 happn	 Badoo	 Tinder	 Badoo	 Meetic	 Meetic
5	 Bumble App	 Badoo	 Azar	 Azar	 Frim	 LivU	 LOVOO	 LOVOO

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

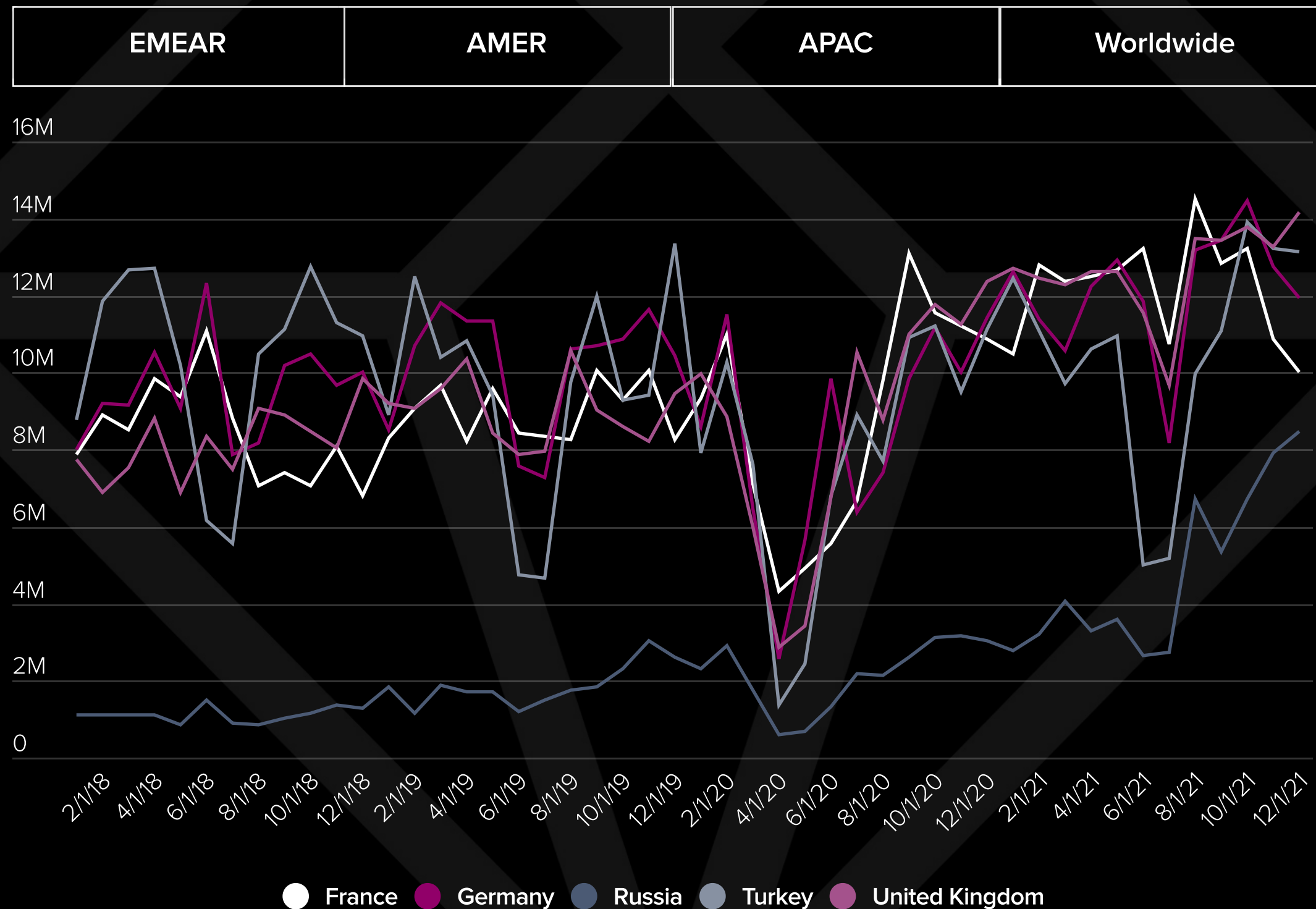
# Other Industries Embracing Mobile

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%). Germany saw a 45% YoY increase in hours spent.

**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.**

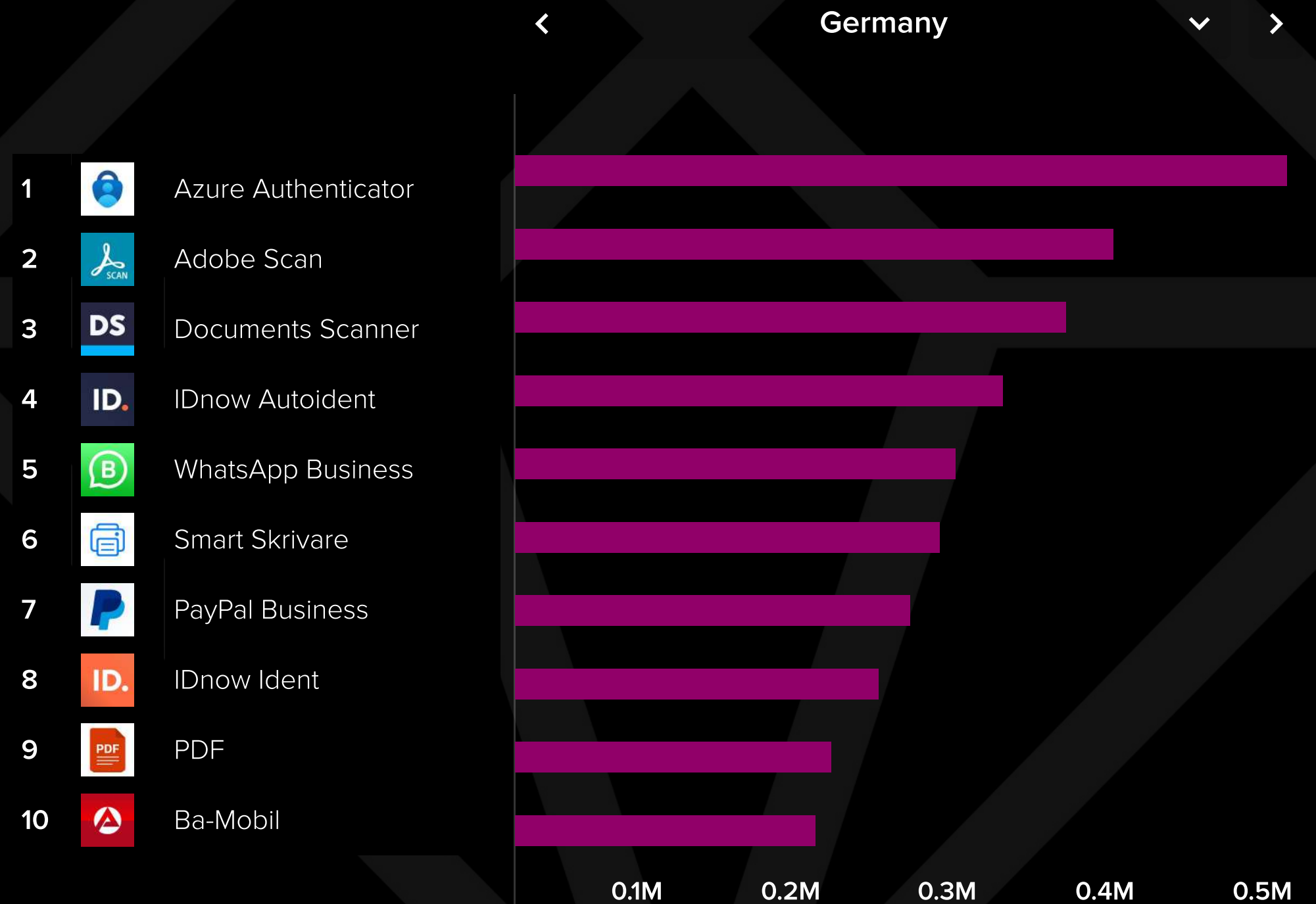
# The Great Resignation? More Like The Mobile-Empowered Work Force

Business productivity apps such as [Adobe Scan](#) and [IDnow](#) were among the top breakout apps by downloads in Germany, while job searching platforms were popular in the UK and India in 2021.

**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

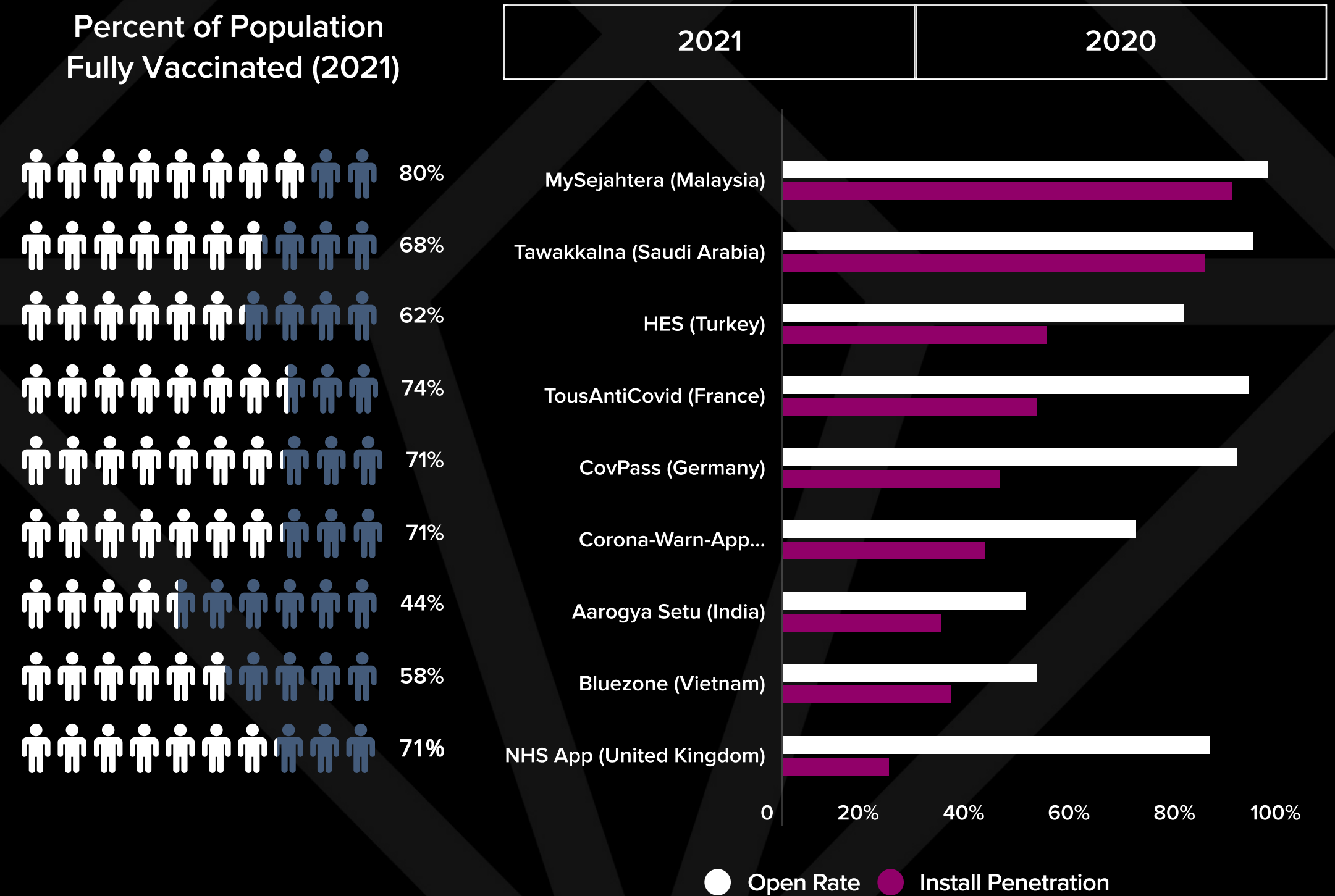
# Vaccine Rollout & App Engagement Are Crucial Drivers of the Ongoing Effort to Combat Covid-19

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. *Germany's Corona-Warn-App* and *CovPass* tend to be used more by males, as seen among the *Top Apps by Likelihood of Use Across Gender*. 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













# 2021 Rankings by Market | Top Apps

< **Germany** ▾ >











## DOWNLOADS

1		CovPass	Medical Health (Health & Fitness)
2		luca app	Public Service (Utility & Productivity)
3		TikTok	Short Videos (Entertainment)
4		Corona-Warn-App	Medical Health (Health & Fitness)
5		WhatsApp Messenger	Communication (Social Media)
6		PayPal	Digital Wallets & Payment (Finance)
7		ZOOM Cloud Meetings	Meeting (Business)
8		Instagram	Media Sharing Networks (Social Media)
9		eBay Kleinanzeigen	E-Commerce (C2C) (Shopping)
10		Telegram	Communication (Social Media)

## CONSUMER SPEND

1		Tinder	Dating (Social Media)
2		Disney+	OTT (Entertainment)
3		DAZN	Sports TV (Sports)
4		TikTok	Short Videos (Entertainment)
5		YouTube	Video Sharing (Entertainment)
6		Twitch	Live Streaming (Entertainment)
7		LOVOO	Dating (Social Media)
8		komoot	Navigation (Utility & Productivity)
9		Google One	File Management (Utility & Productivity)
10		Babbel	Language Learning (Education)

## MONTHLY ACTIVE USERS

1		WhatsApp Messenger	Communication (Social Media)
2		Facebook	Social Networks (Social Media)
3		Amazon	E-Commerce (B2C) (Shopping)
4		Instagram	Media Sharing Networks (Social Media)
5		CovPass	Medical Health (Health & Fitness)
6		Facebook Messenger	Communication (Social Media)
7		Corona-Warn-App	Medical Health (Health & Fitness)
8		eBay Kleinanzeigen	E-Commerce (C2C) (Shopping)
9		Spotify	Music & Audio (Entertainment)
10		TikTok	Short Videos (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

< Germany v >











## DOWNLOADS

1		Project Makeover	M3-Meta (Match)
2		ROBLOX	Creative Sandbox (Simulation)
3		Subway Surfers	Runner (Action)
4		Among Us!	Mafia/Betrayal (Party)
5		Count Masters	Action (Hypercasual)
6		Water Sort Puzzle	Puzzle (Hypercasual)
7		New Quizduel	Quiz (Party)
8		Homescapes	M3-Meta (Match)
9		Brawl Stars	Brawl (Action)
10		Magic Tiles 3	Music (Hypercasual)

## CONSUMER SPEND

1		Coin Master	Luck Battle (Party)
2		State of Survival	4X March-Battle (Strategy)
3		Gardenscapes - New Acres	M3-Meta (Match)
4		PUBG MOBILE	Battle Royale (Shooting)
5		Pokémon GO	Location RPG (RPG)
6		Homescapes	M3-Meta (Match)
7		Brawl Stars	Brawl (Action)
8		Clash of Clans	Build-Battle (Strategy)
9		Fishdom: Deep Dive	M3-Meta (Match)
10		ROBLOX	Creative Sandbox (Simulation)

## MONTHLY ACTIVE USERS

1		ROBLOX	Creative Sandbox (Simulation)
2		Pokémon GO	Location RPG (RPG)
3		Candy Crush Saga	M3-Saga (Match)
4		Among Us!	Mafia/Betrayal (Party)
5		Brawl Stars	Brawl (Action)
6		Clash Royale	Summon-Battle (Strategy)
7		Subway Surfers	Runner (Action)
8		Clash of Clans	Build-Battle (Strategy)
9		Homescapes	M3-Meta (Match)
10		New Quizduel	Quiz (Party)

[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

< Germany >

## DOWNLOADS

Rank	Company	HQ	Top Apps by Downloads
1	Google	United States	 YouTube
2	Microsoft	United States	 Microsoft Teams
3	Amazon	United States	 Amazon
4	Meta	United States	 WhatsApp Messenger
5	Robert Koch-Institut	Germany	 CovPass
6	ABISHKKING	Hong Kong	 FREE QR Scanner by Simple Design
7	ByteDance	China	 TikTok
8	culture4life	Germany	 luca app
9	Otto Group	Germany	 OTTO
10	InShot Inc	China	 InShot

## CONSUMER SPEND

Rank	Company	HQ	Top Apps by Consumer Spend
1	Match Group	United States	 Tinder
2	Google	United States	 YouTube
3	Disney	United States	 Disney+
4	DAZN Group	United Kingdom	 DAZN
5	Amazon	United States	 Twitch
6	ByteDance	China	 TikTok
7	ProSiebenSat.1 Media	Germany	 LOVOO
8	Microsoft	United States	 Microsoft Word
9	Komoot	Germany	 komoot
10	Bumble	United Kingdom	 Bumble App

[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

Germany

## DOWNLOADS

Company	HQ	Top Games by Downloads
1 AppLovin	United States	Project Makeover
2 Voodoo	France	Bounce and collect
3 Zynga	United States	Hair Challenge
4 SayGames	Belarus	DOP 2: Delete One Part
5 Azur Interactive Games	Cyprus	Hit Master 3D: Knife Assassin
6 Crazy Labs	Israel	Phone Case DIY
7 ironSource	Israel	Bridge Race
8 Tencent	China	PUBG MOBILE
9 OneSoft	Vietnam	Galaxy Attack: Alien Shooter
10 Ubisoft	France	Rider

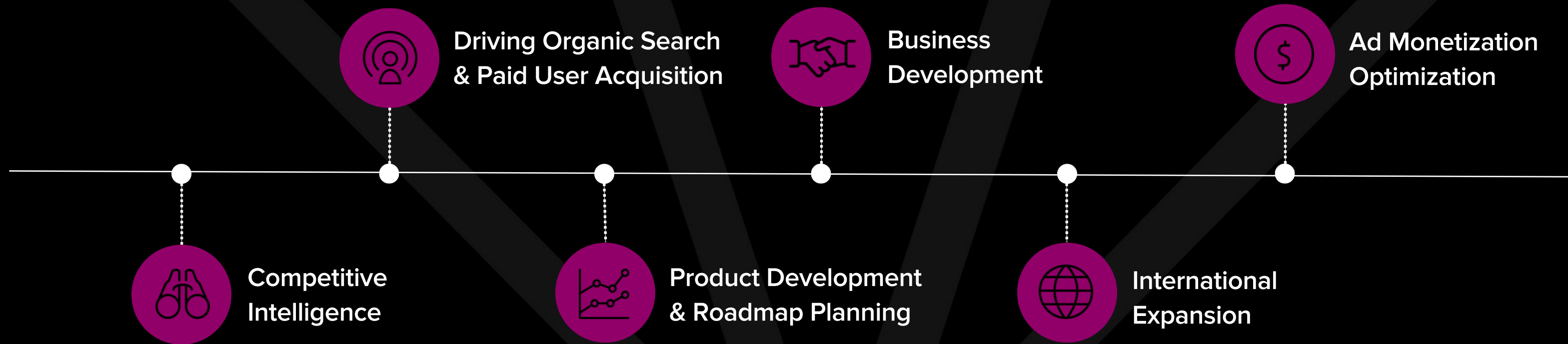
## CONSUMER SPEND

Company	HQ	Top Games by Downloads
1 Playrix	Ireland	Gardenscapes - New Acres
2 Supercell	Finland	Brawl Stars
3 FunPlus	China	State of Survival
4 Moon Active	Israel	Coin Master
5 Zynga	United States	Empires & Puzzles
6 Activision Blizzard	United States	Candy Crush Saga
7 Tencent	China	PUBG MOBILE
8 Playtika	Israel	Solitaire - Grand Harvest
9 Niantic	United States	Pokémon GO
10 Lilith	China	Rise of Kingdoms

[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

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