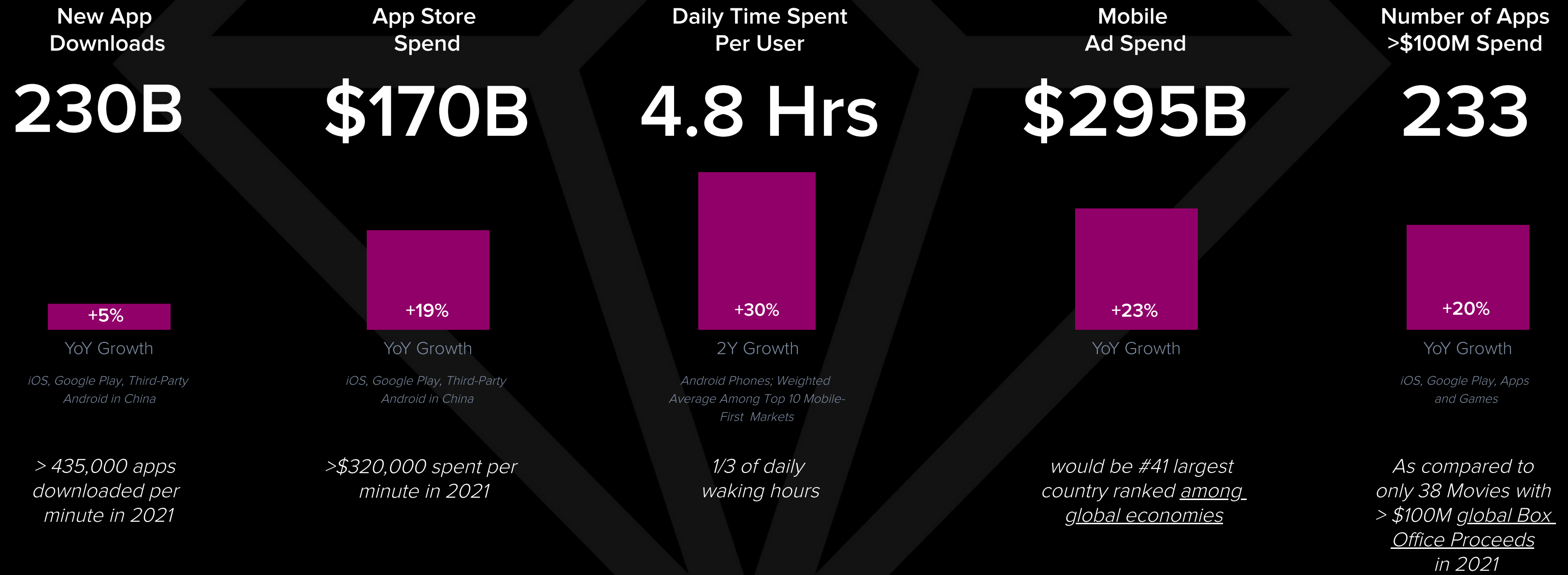


STATE OF MOBILE 2022

EXECUTIVE SUMMARY

2021 Mobile Landscape at a Glance



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- [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



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

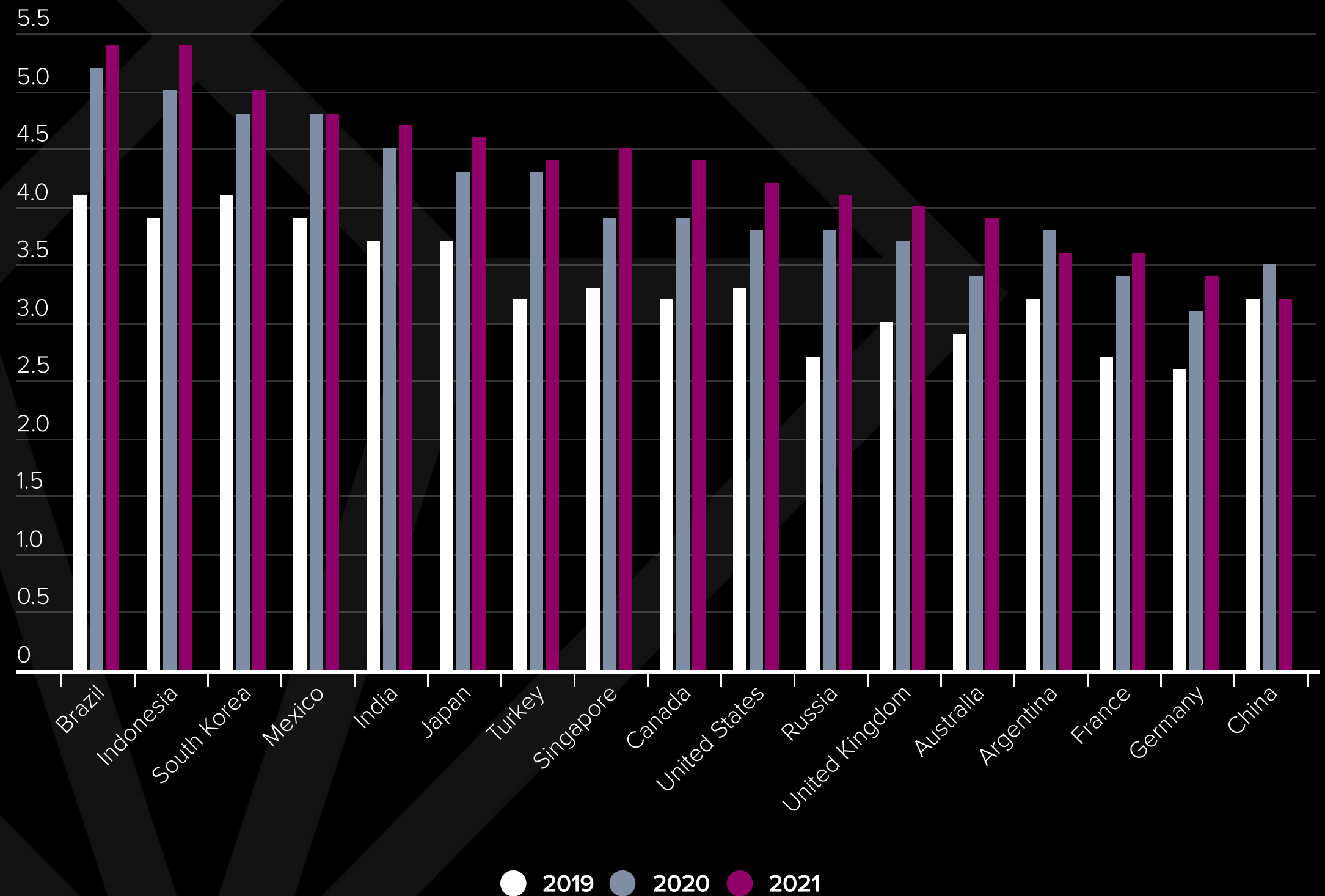
Across the top 10 markets analyzed, the weighted average surpassed 4 hours 48 minutes in 2021 — up 30% from 2019.

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.

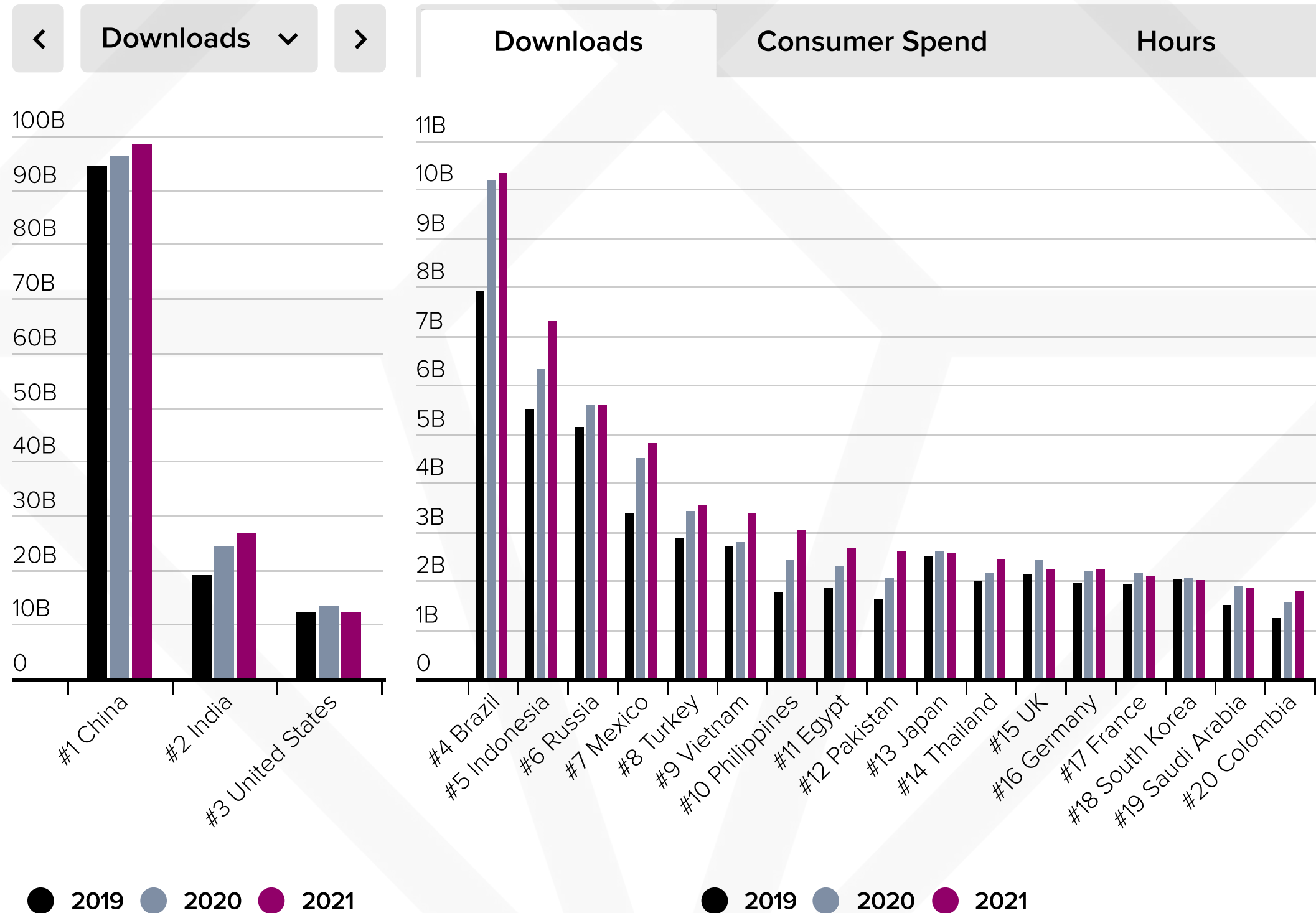
Mobile usage estimates highlight growth sectors to inform strategic roadmap and investment priorities. Know where to make strategic decisions: advertising spend, corporate prioritization and resource allocation follow the eyeballs — and they are on mobile.

Average Hours Spent on Mobile Per Day Per User



Source: App Annie Intelligence
Note: Android phones

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

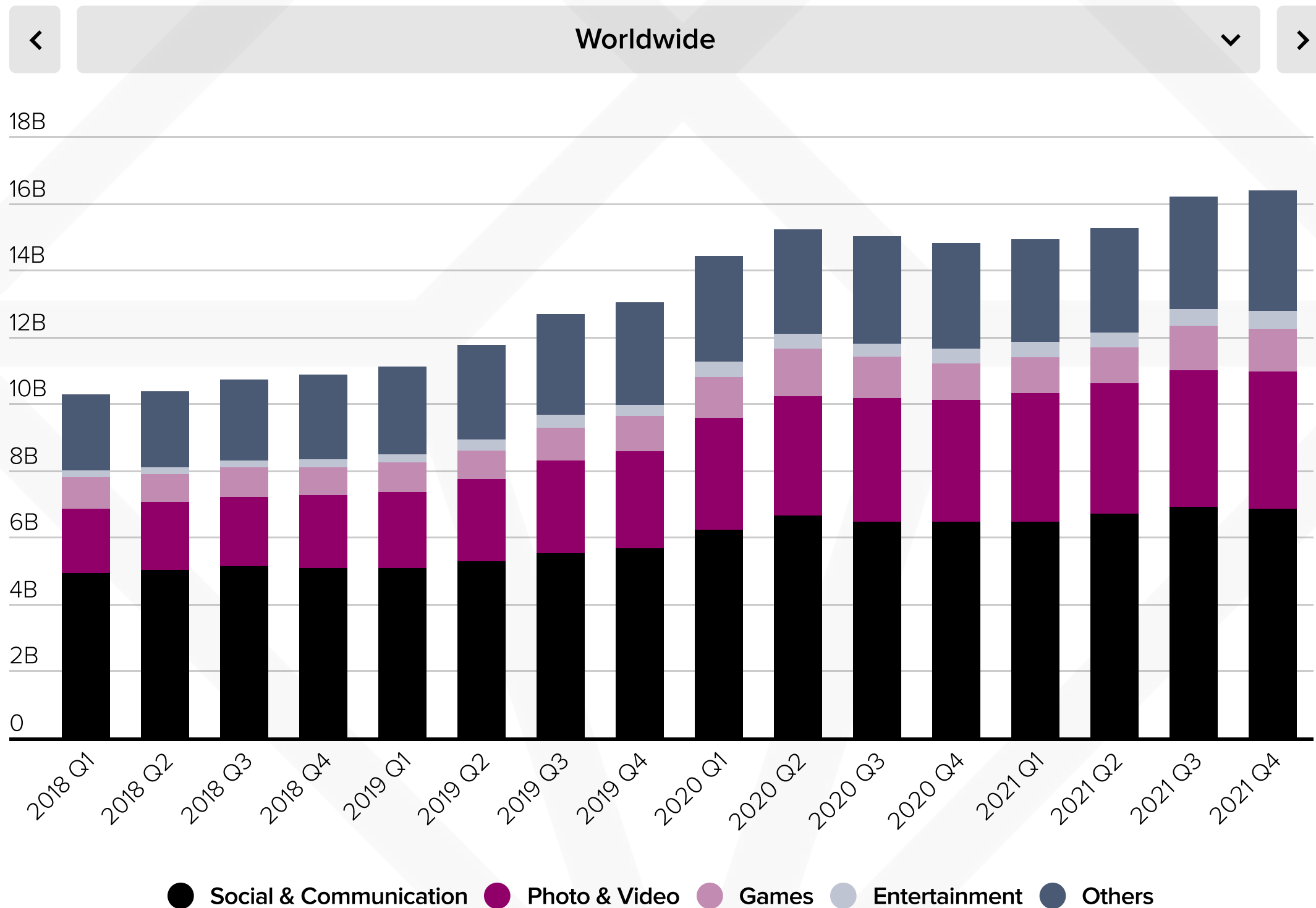
Globally 230 Billion Downloads, \$170 Billion in Consumer Spend, 3.8 Trillion Hours

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.

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

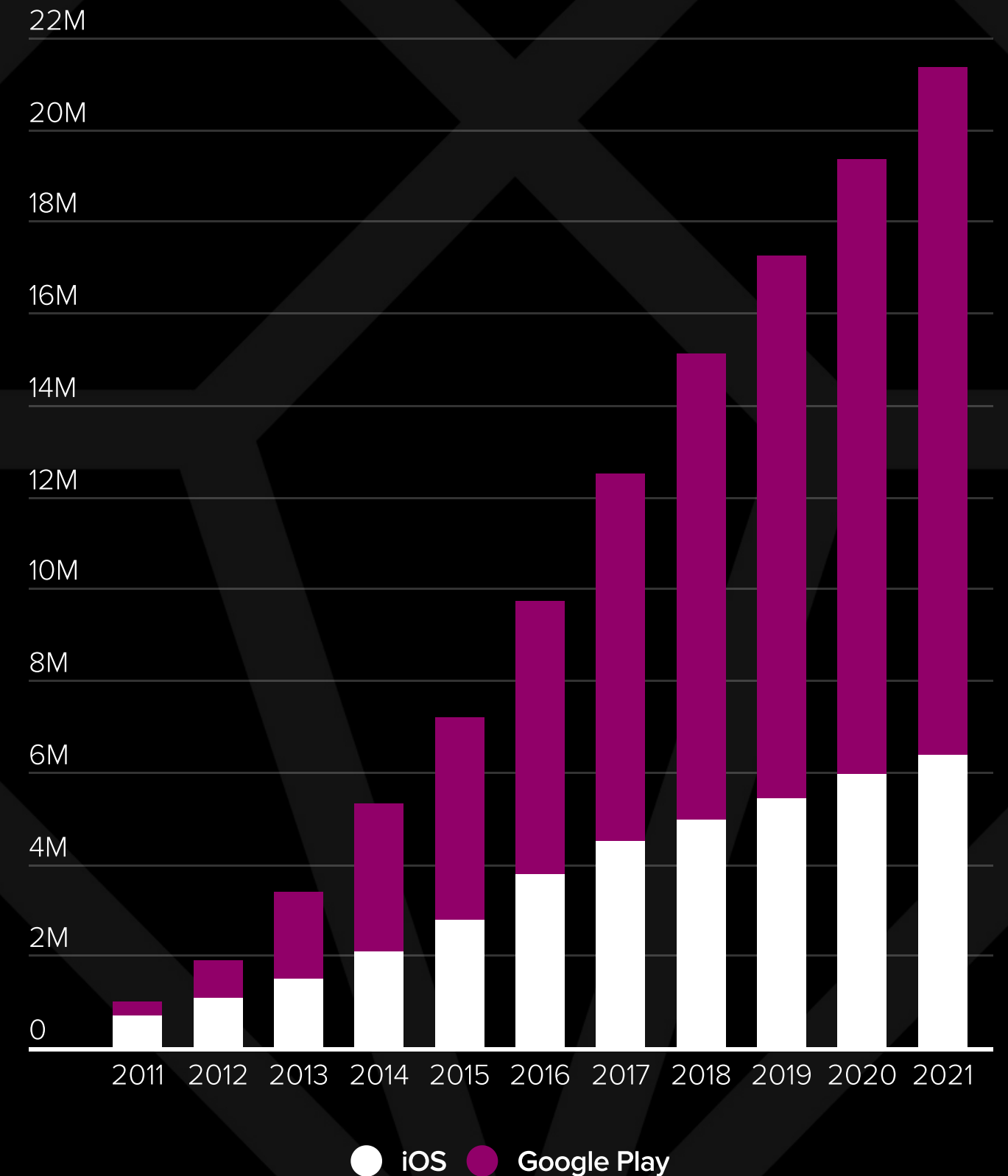
This brings the total of apps and games ever released on iOS and Google Play to over 21 million.

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

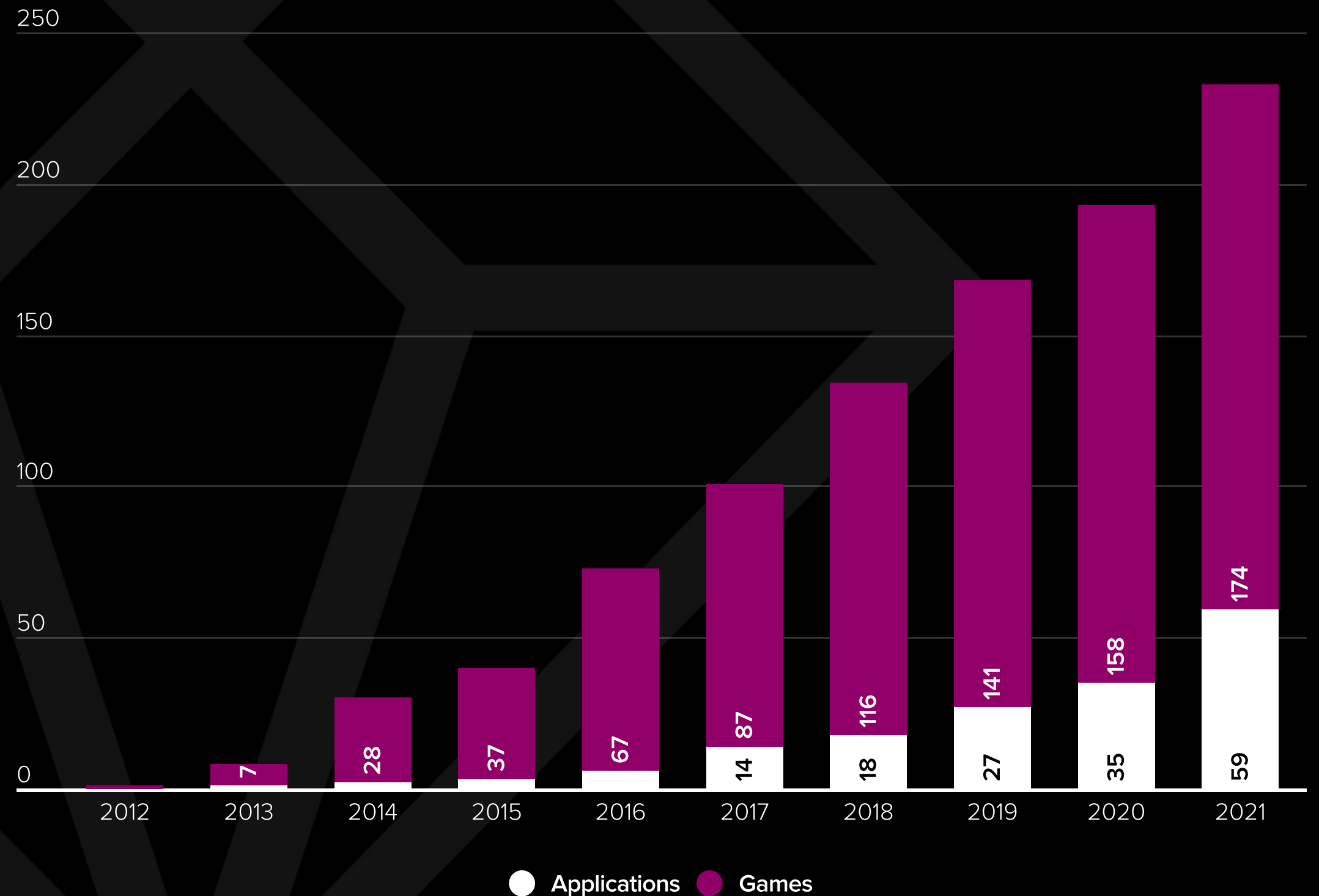
233 Apps & Games Generated Over \$100 Million Dollars Annually in 2021

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

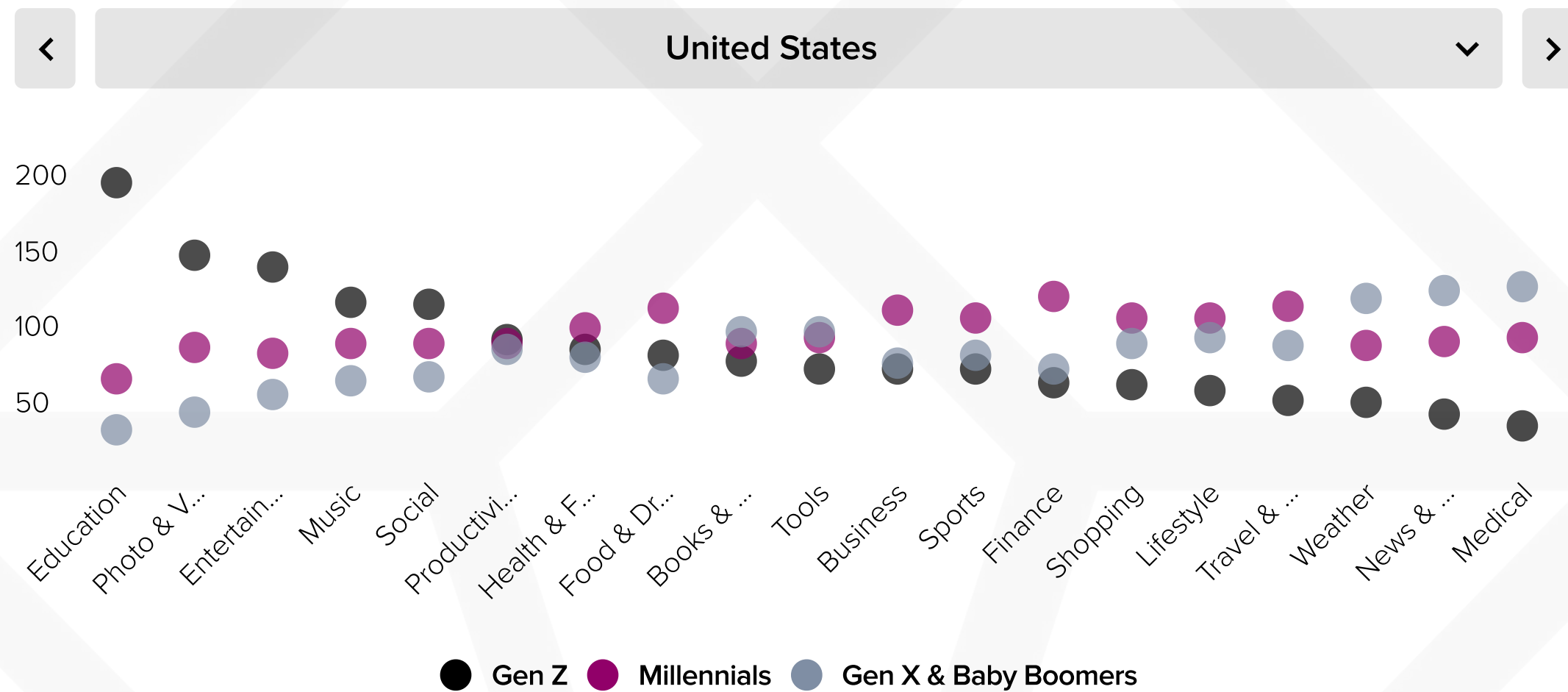


Source: App Annie Intelligence

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

| Rank | Gen Z | Millennials | Gen X & Baby Boomers |
|------|-----------|--------------------|----------------------|
| 1 | Instagram | Facebook | BOM Weather |
| 2 | Spotify | Facebook Messenger | Check In Qld |
| 3 | Netflix | WhatsApp Messenger | Service Victoria |
| 4 | Snapchat | eBay | 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

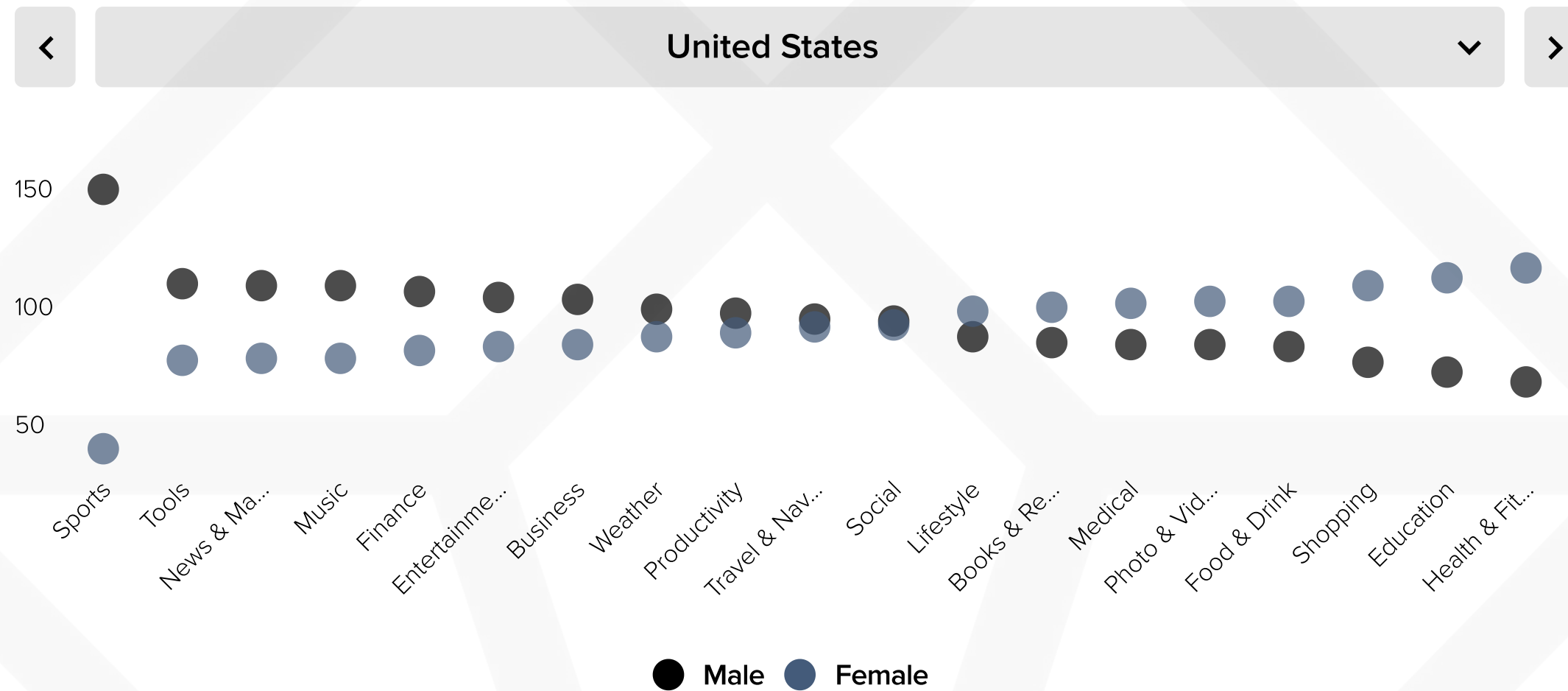
Apps in categories that are already highly relevant to Gen Z can be excellent partners to help you increase engagement, including Photo & Video, Entertainment, and Social.

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.

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

MACRO MOBILE TRENDS: DEMOGRAPHICS

Market Differences Emerge by Gender Based on App Category

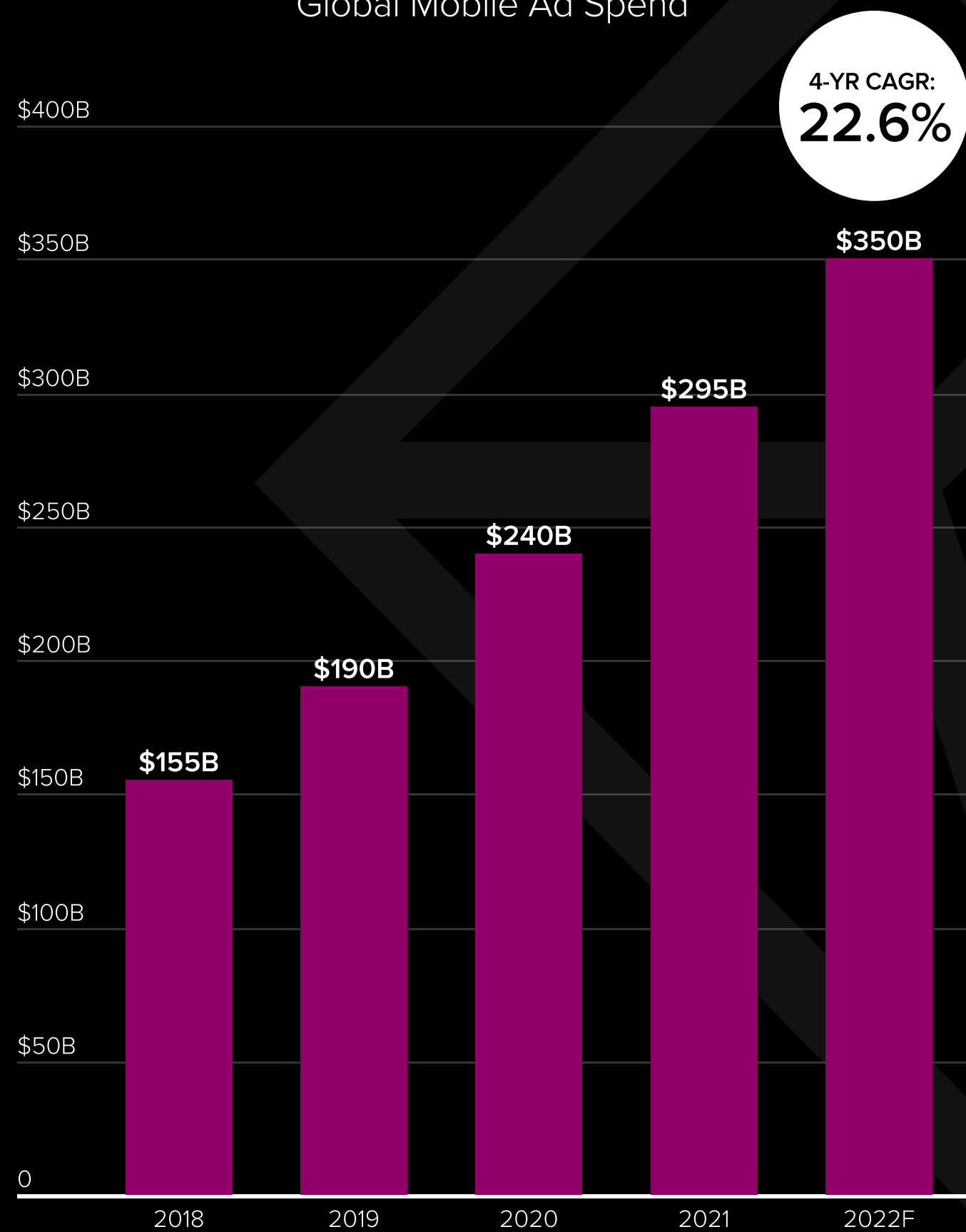
Sports apps overindex heavily with males in each market analyzed, whereas Food & Drink apps tend to skew more female. However, the difference can be subtle in the case of the US for Food & Drink and more dramatic in other markets like Japan.

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.](#)

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 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



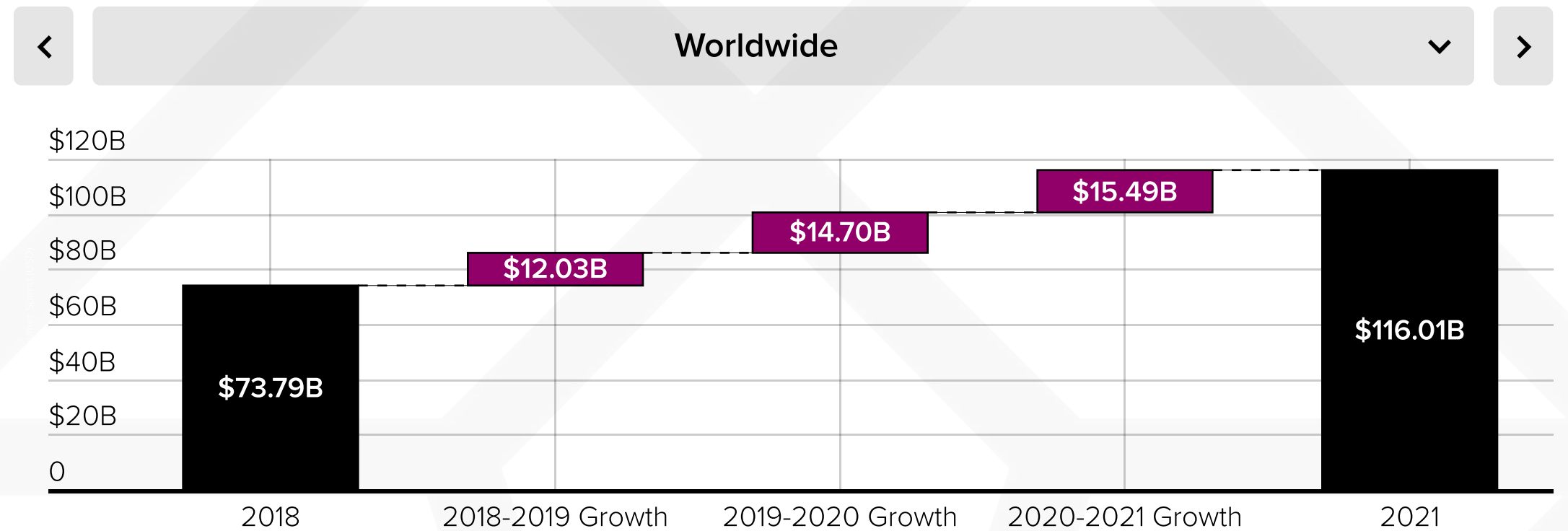
Additional \$16 Billion in Gaming Consumer Spend was Added in 2021, Bringing Total to \$116 Billion

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.

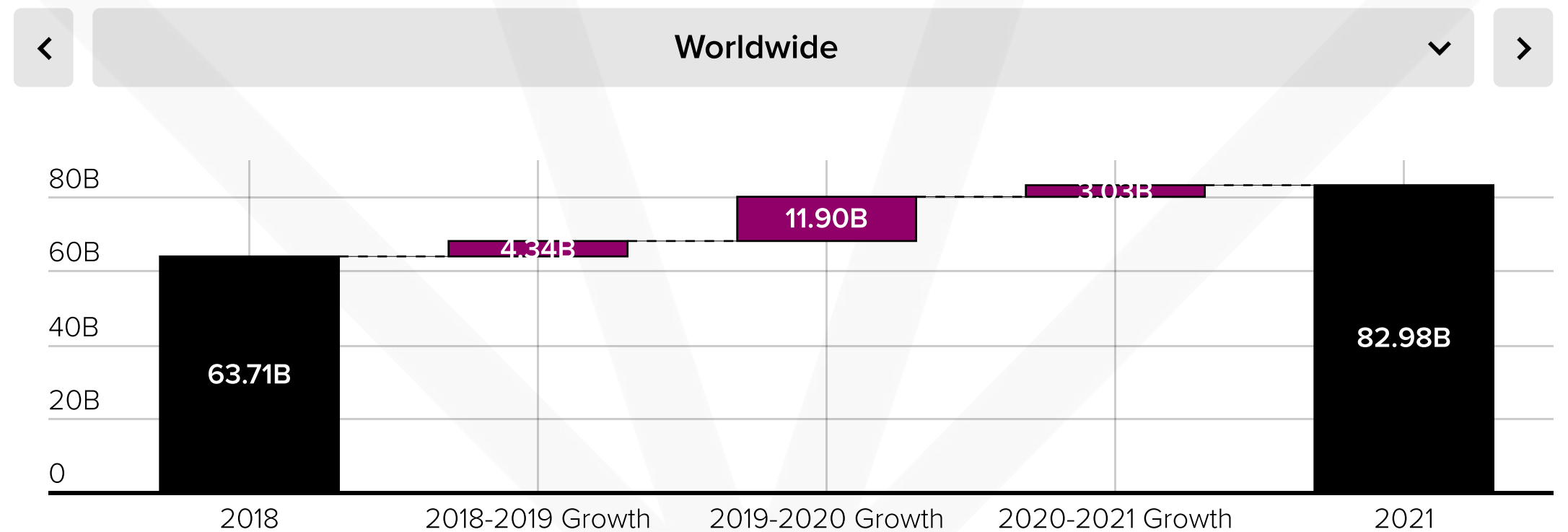
Hypercasual games like *Bridge Race* and *Hair Challenge* were key downloads driver, but 2021 saw some well known IPs such as *Pokémon UNITE*, and *PUBG: NEW STATE* making major gains in downloads and usage.

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

Mobile Game Consumer Spend Growth



Mobile Game Downloads Growth



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 |

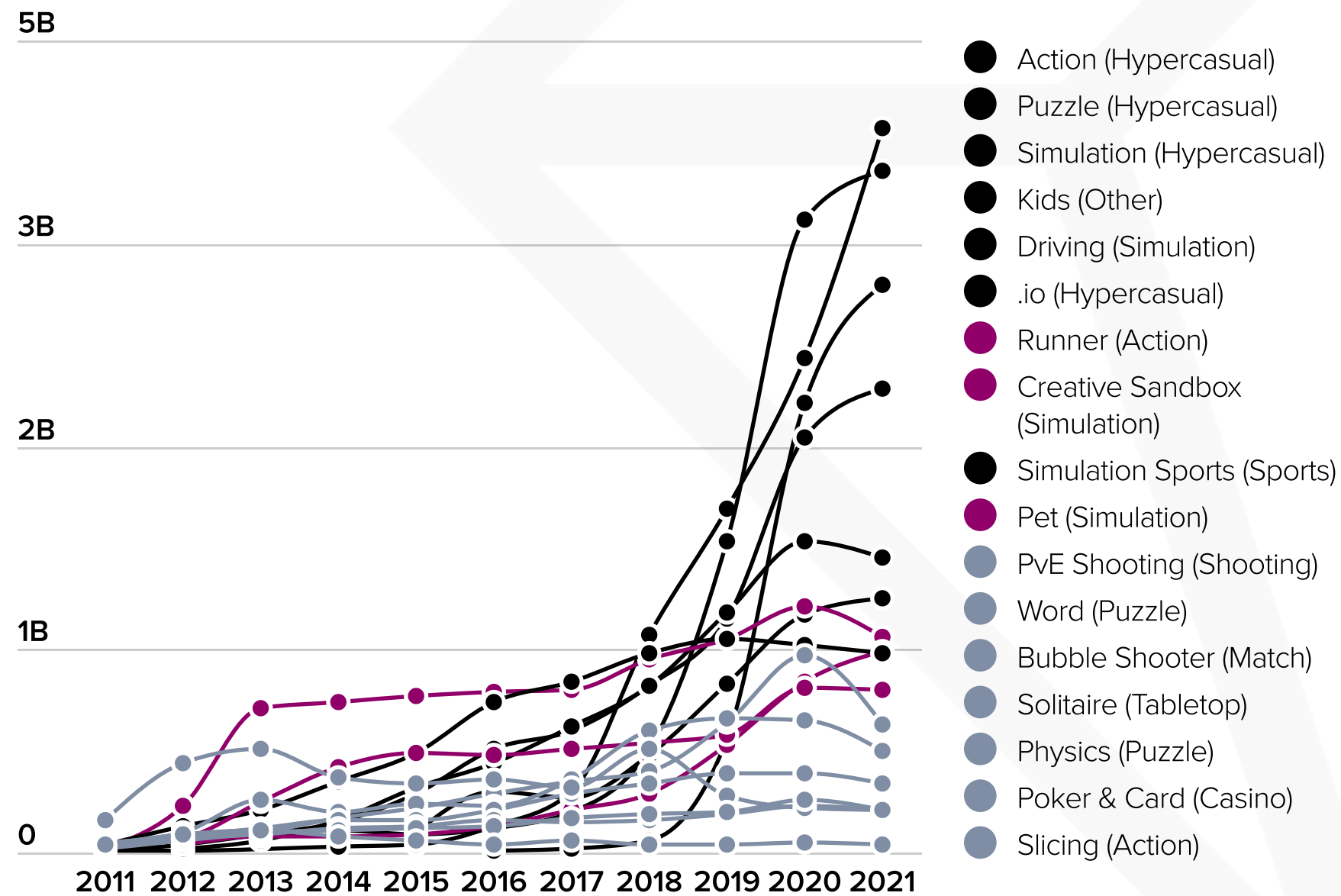
Learn More: [Uncover the Top Games by Change in Yearly Downloads](#)

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

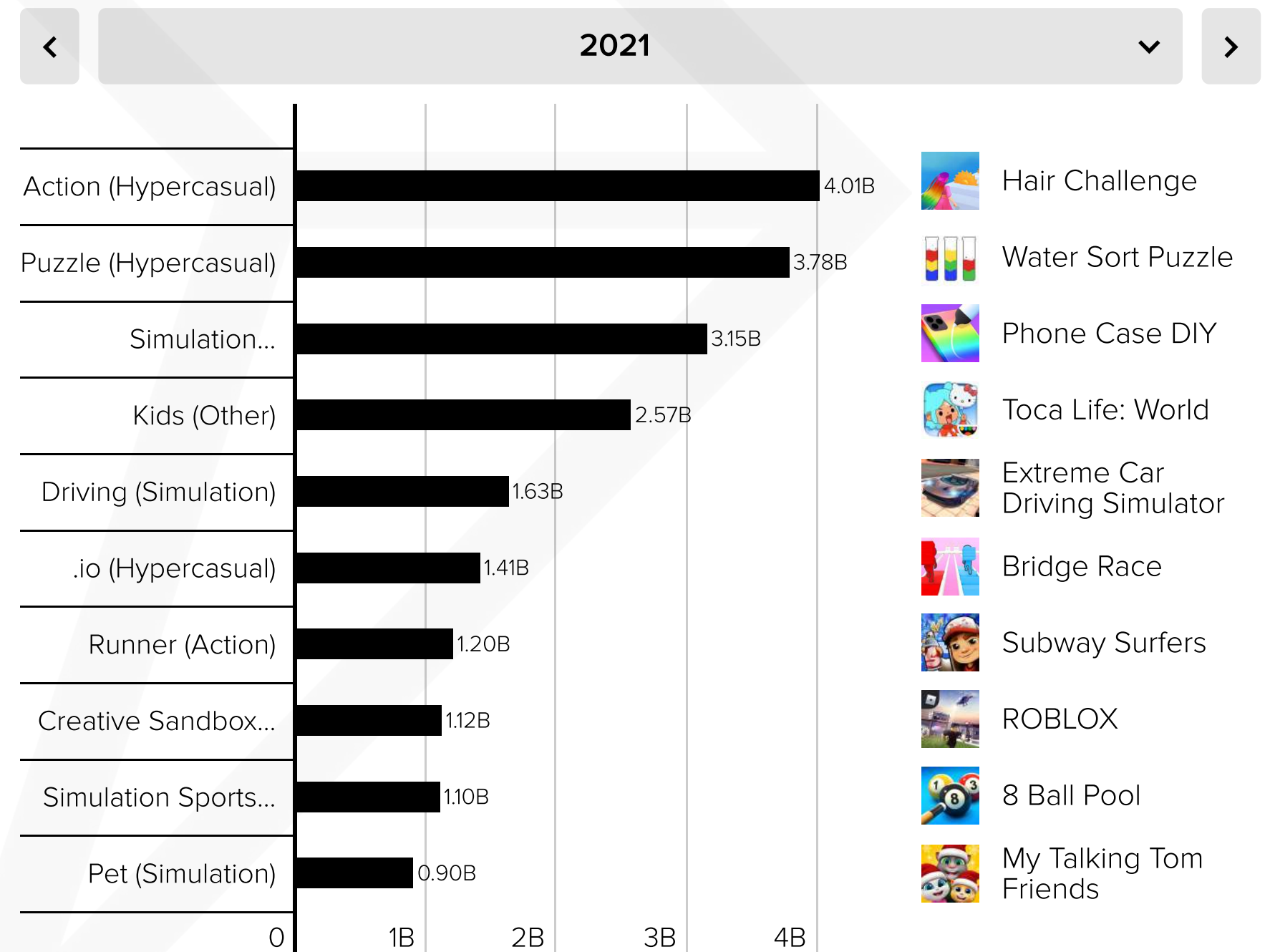
Astronomical Rise of Hypercasual: Innovation & Shifting Player Preferences Gave Way to Emerging Game Genres

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



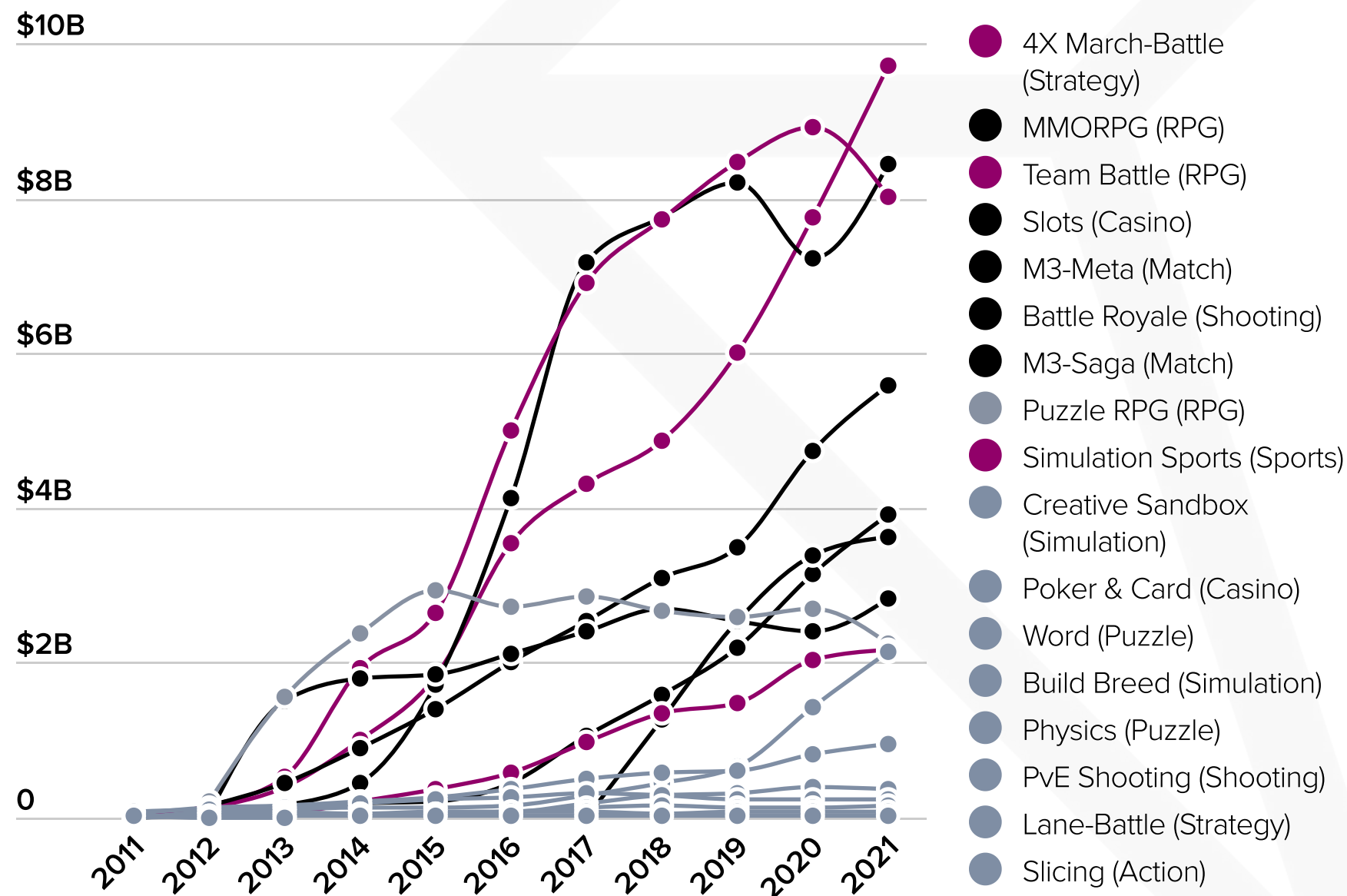
[Analyze More Genres in App Annie's Game IQ Market Sizing Report](#)

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

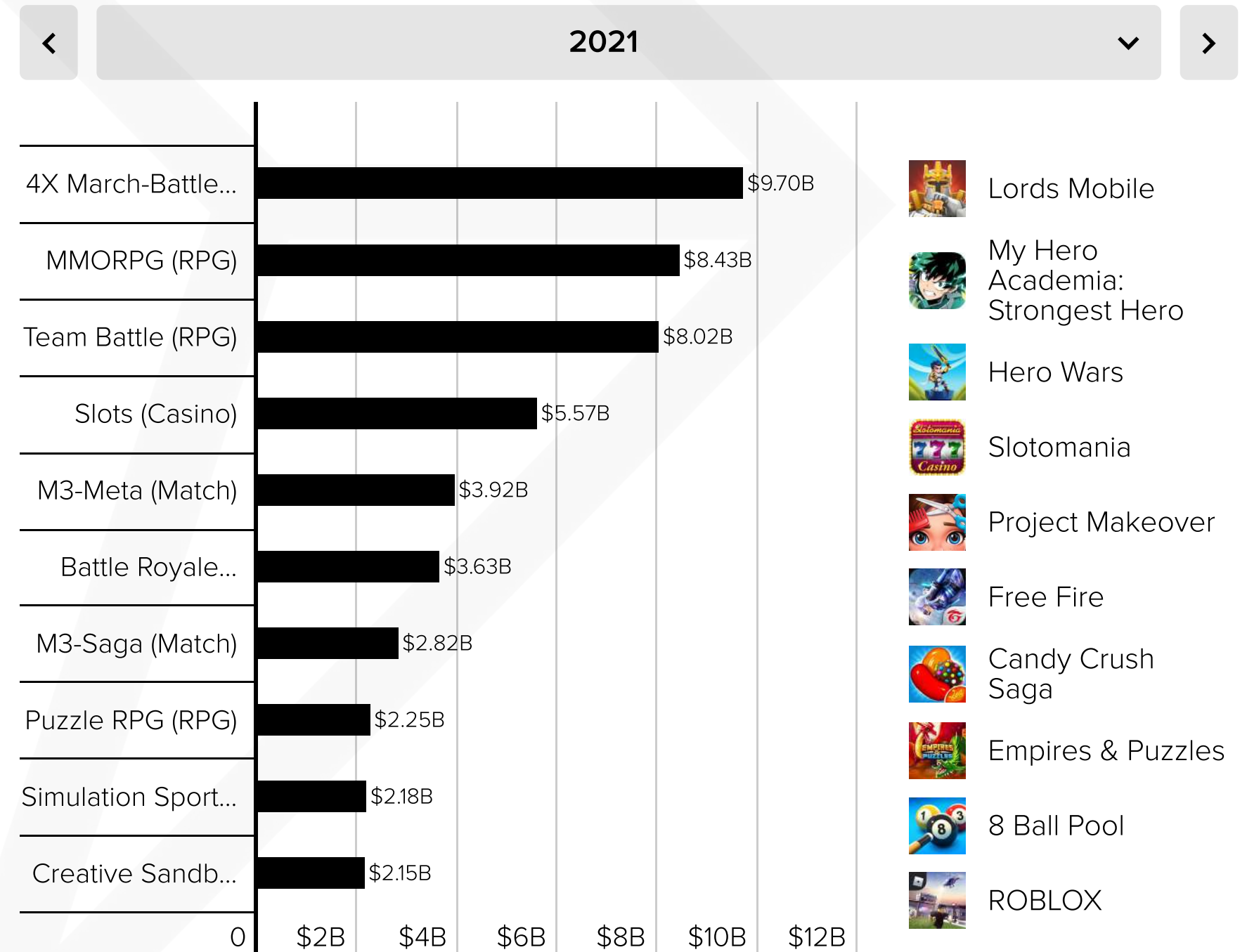
4x March-Battle Strategy Games Emerged as the Most Monetizable Genre for Mobile Games

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

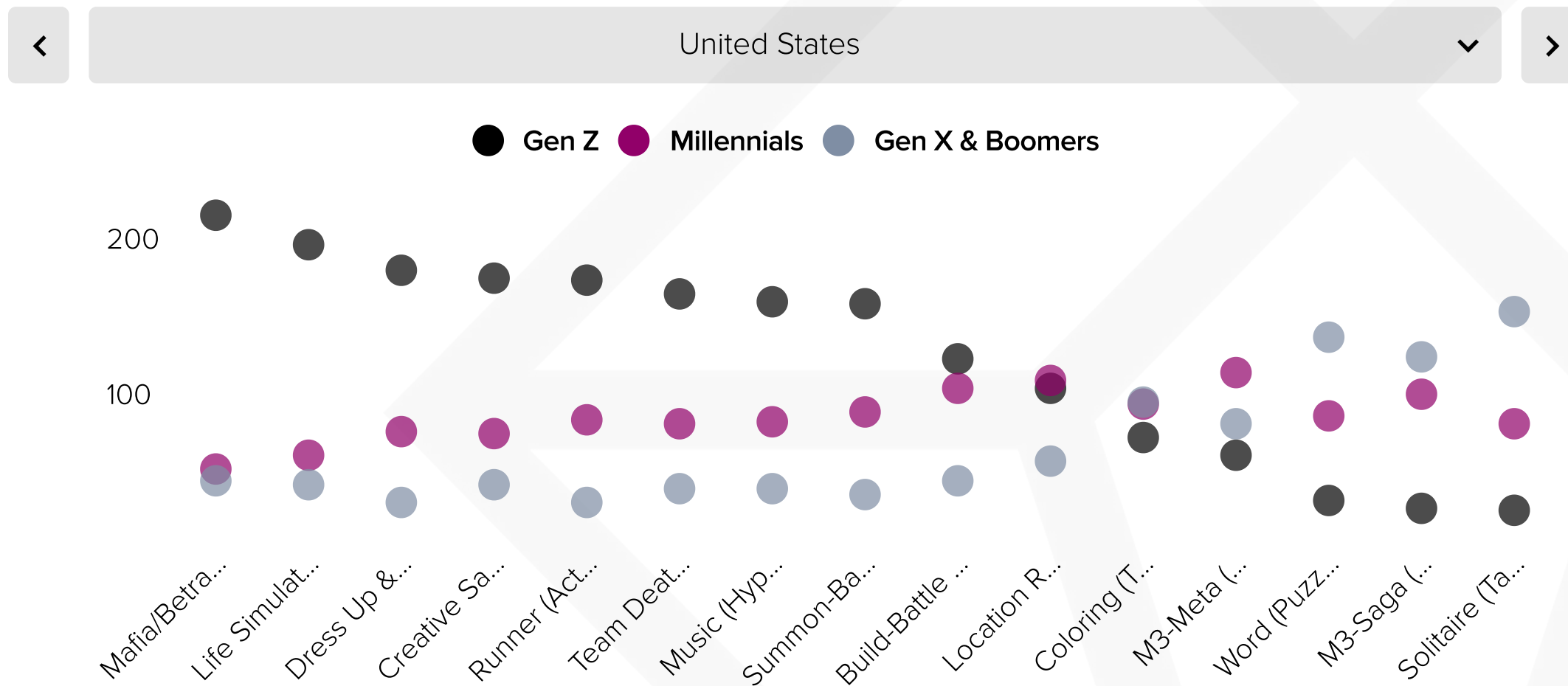


[Analyze More Genres in App Annie's Game IQ Market Sizing Report](#)

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

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

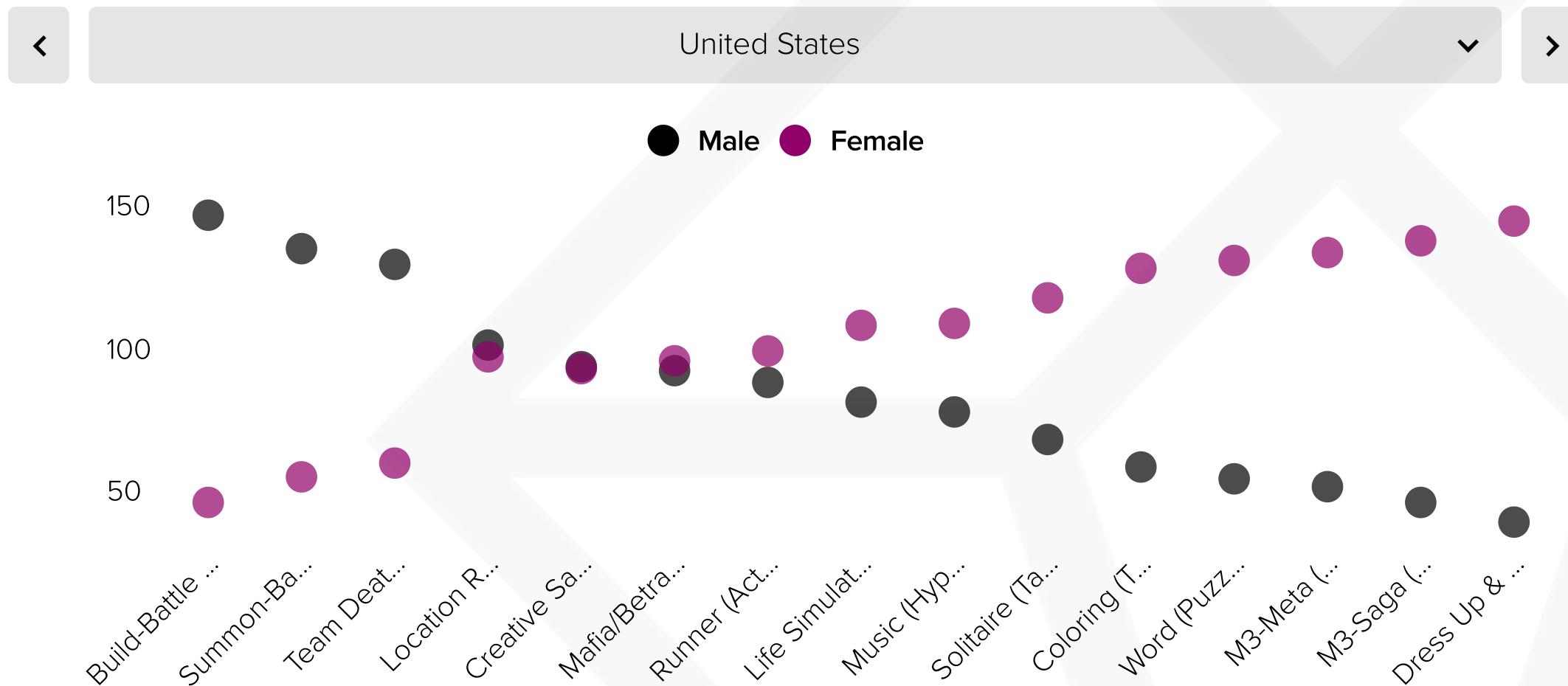
Party, Simulation, Shooters & RPG Skew Towards Gen Z; Match 3 & Puzzle Preferred By Older Age Groups

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

- Pokémon GO
- Call of Duty: Mobile
- Clash Royale

Location RPG (RPG)

Team Deathmatch (Shooting)

Summon-Battle (Strategy)

Female

- ROBLOX
- Among Us!
- Candy Crush Saga

Creative Sandbox (Simulation)

Mafia/Betrayal (Party)

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.

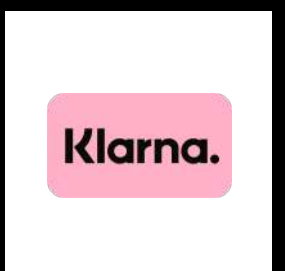
Not only are *Among Us!* and *ROBLOX* clear favorites among Gen Z, they also have higher tendency to be played by female audiences. *Pokémon GO* has enjoyed widespread popularity globally, but tends to skew towards a male audience.

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](#).

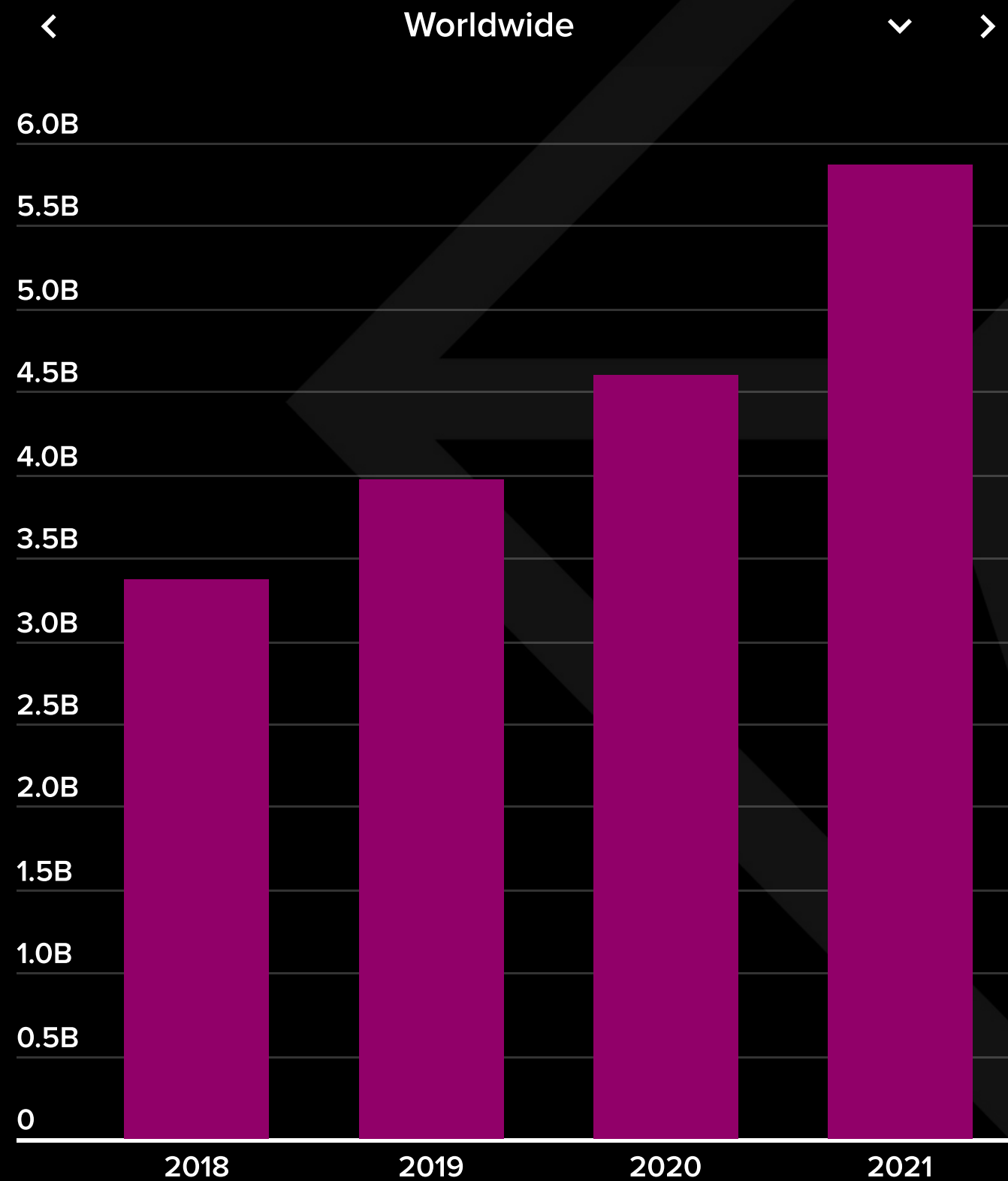
Finance

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



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.

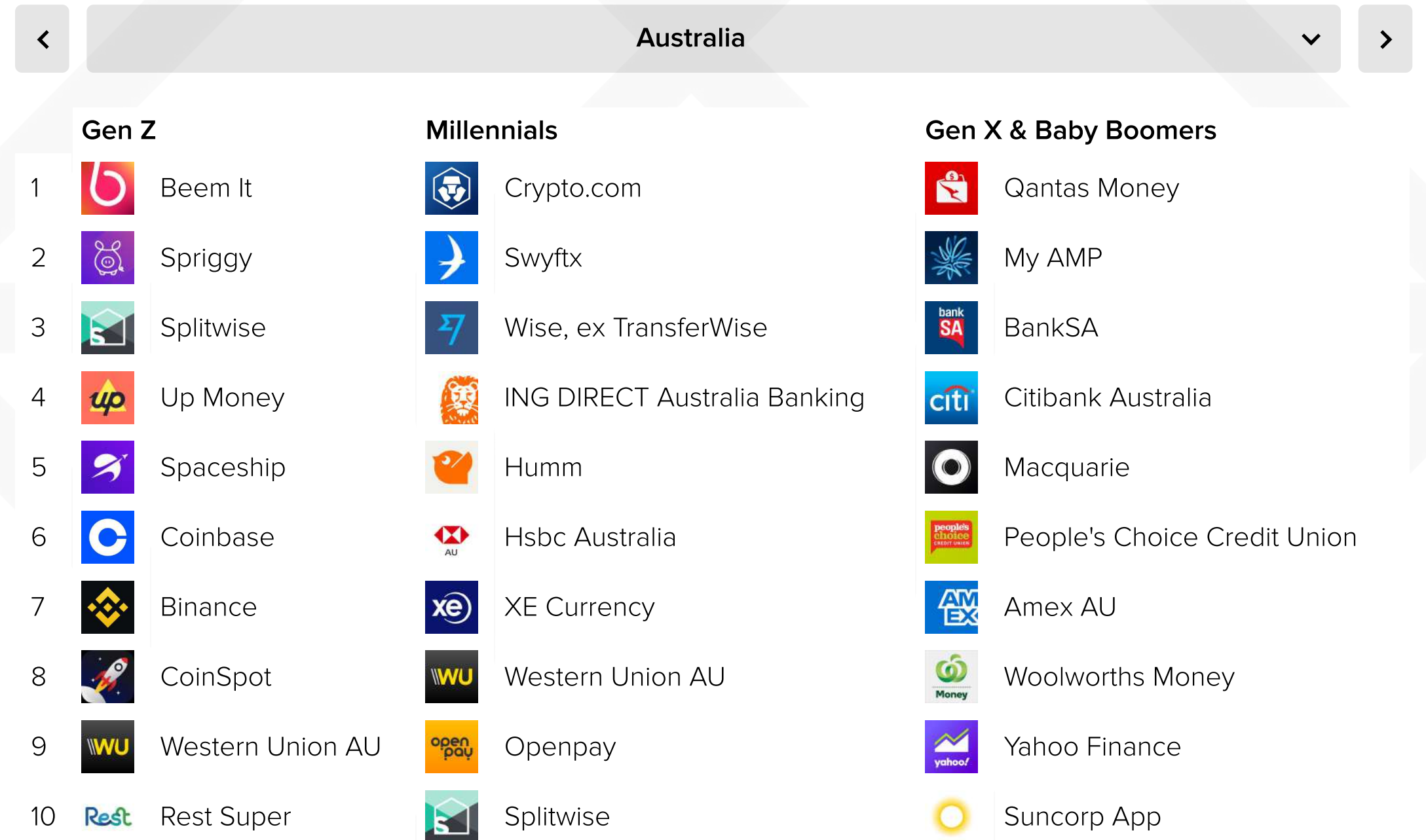
Embracing Innovation: Gen Z Are Most Likely to Use Neobanks and Cryptocurrency Trading Apps

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

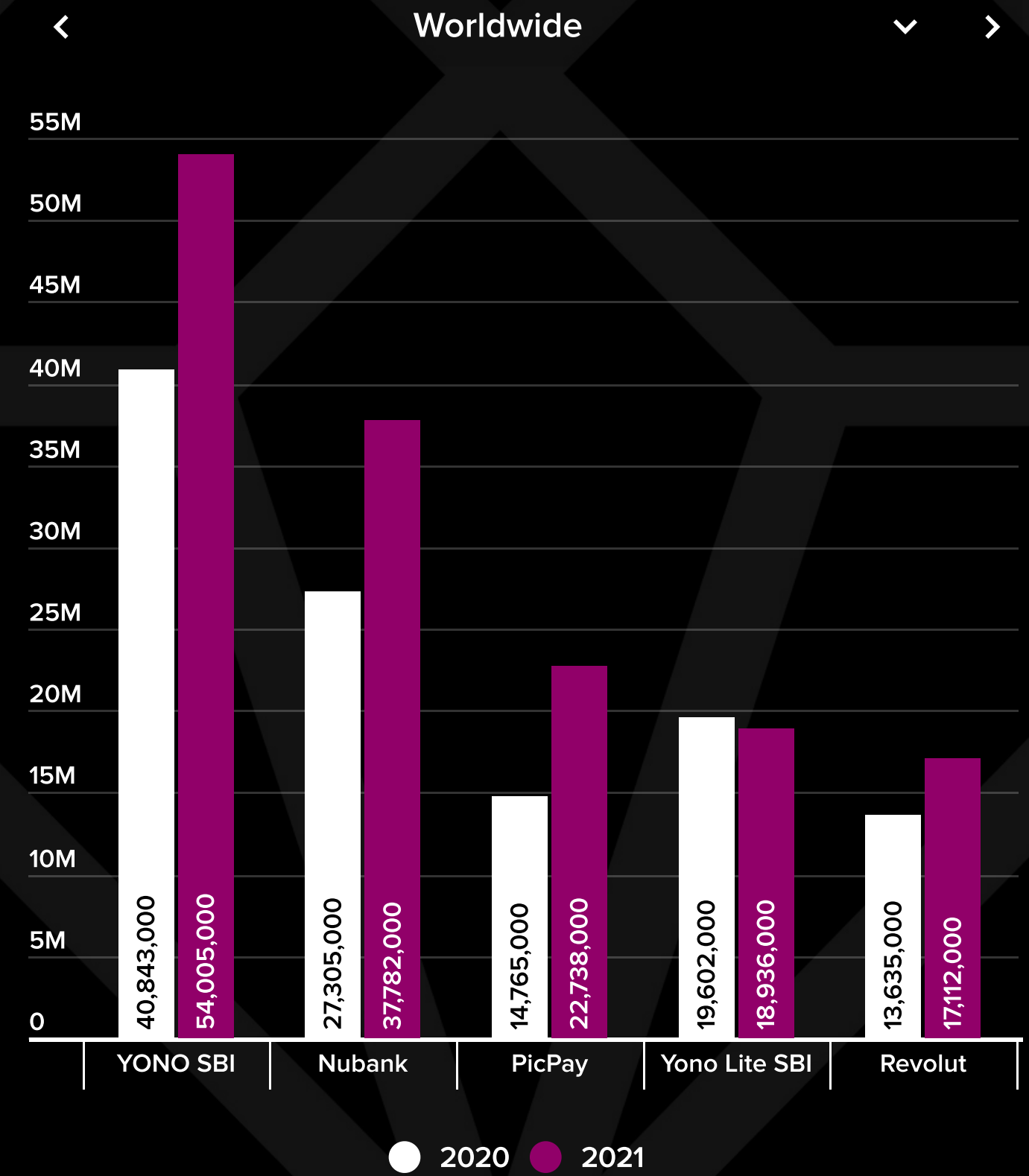
Most countries tend to use homegrown neobanks; Mexico is an exception, where *Brazil's Nubank* topped the charts across both countries.

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.

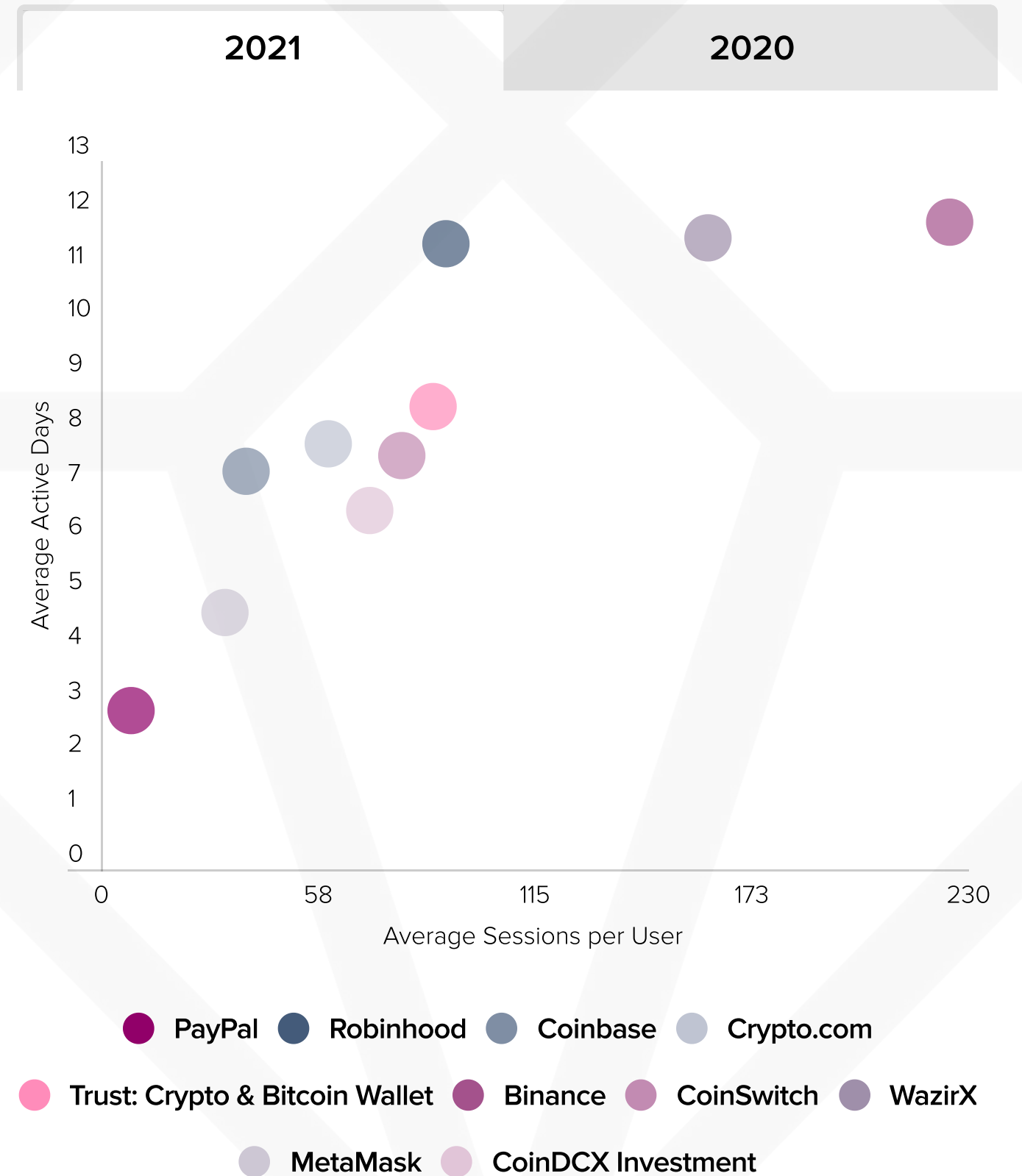
PayPal Entered the Cryptocurrency Market in 2021; Binance & WazirX Saw the Highest YoY Increase in Sessions Per User Worldwide

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.

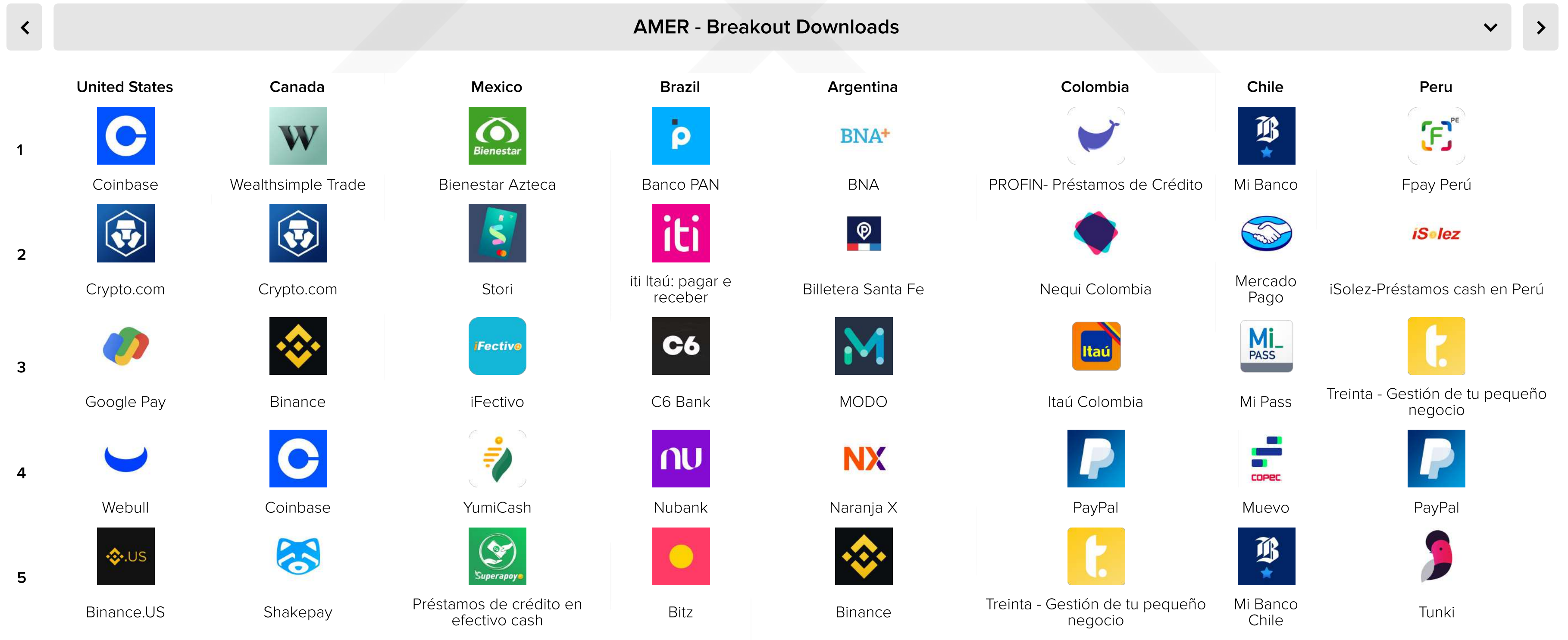
Although PayPal had the highest average MAU worldwide, Trust: Crypto & Bitcoin Wallet, Binance, and WazirX saw the highest increase in usage YoY; understanding the flexibility of their offerings that go beyond trading cryptocurrency assets is crucial for any app publisher that tries to emulate their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



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

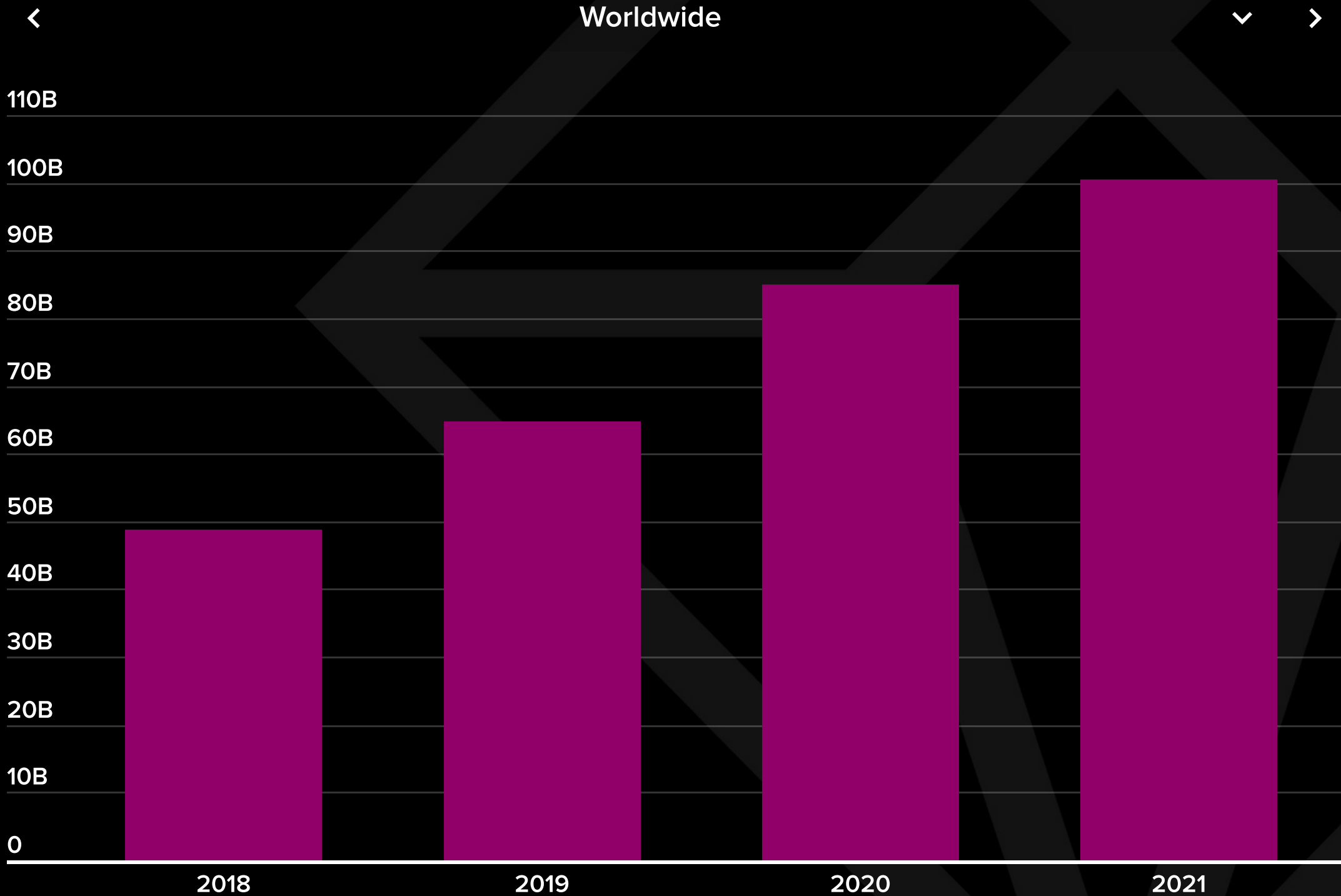
Retail

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.

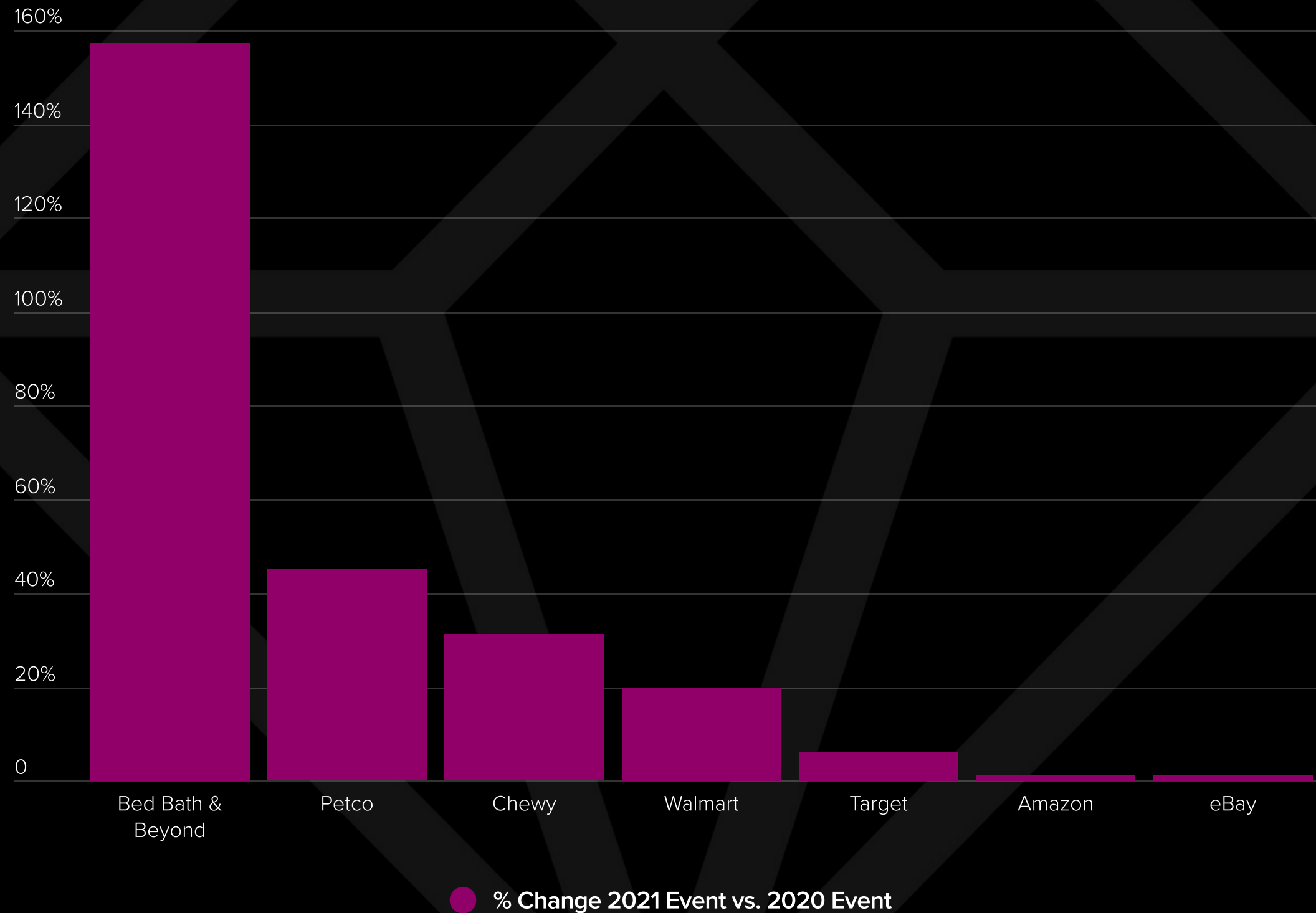
Retail brands are losing share to non-local companies, most notably in regions across AMER as shoppers turn to overseas-HQ'd Shopping apps. Evaluate which of the top companies are driving shifts in market share.

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

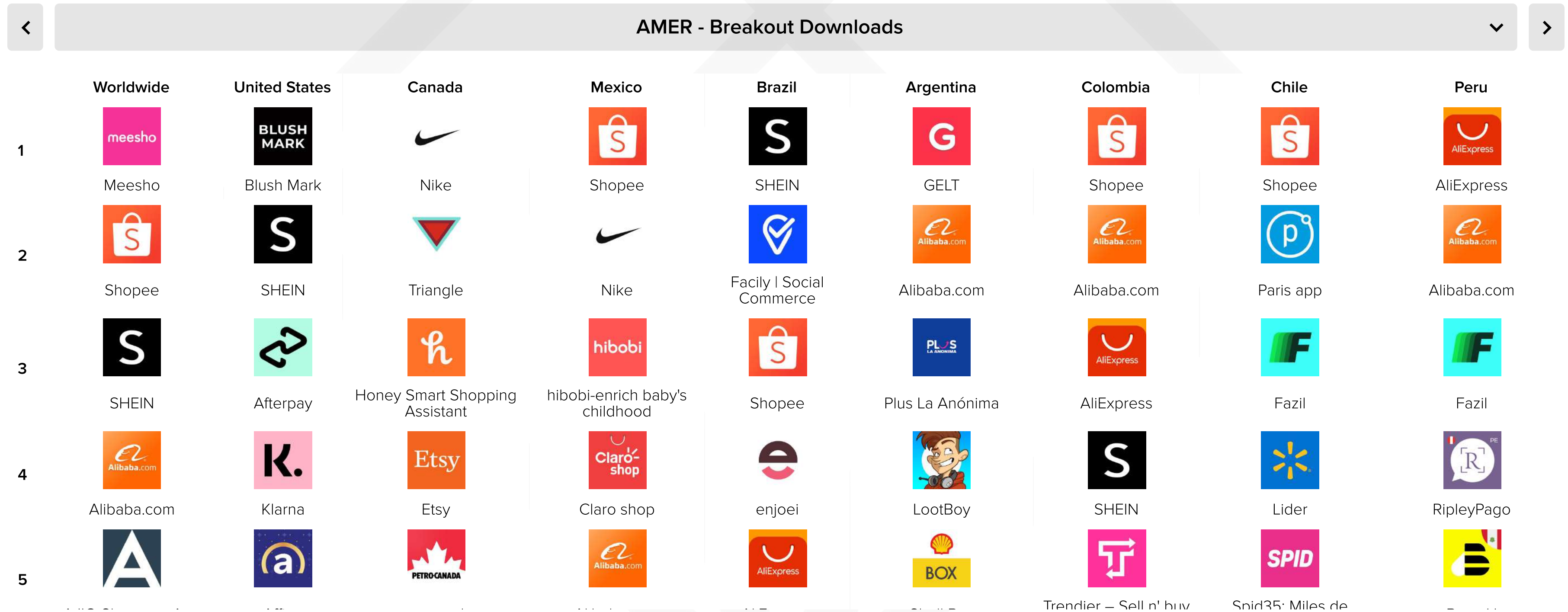
Competing "Amazon Prime Day" Events Spurred Sessions Growth by 20% for Walmart & Smaller Savvy Players

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

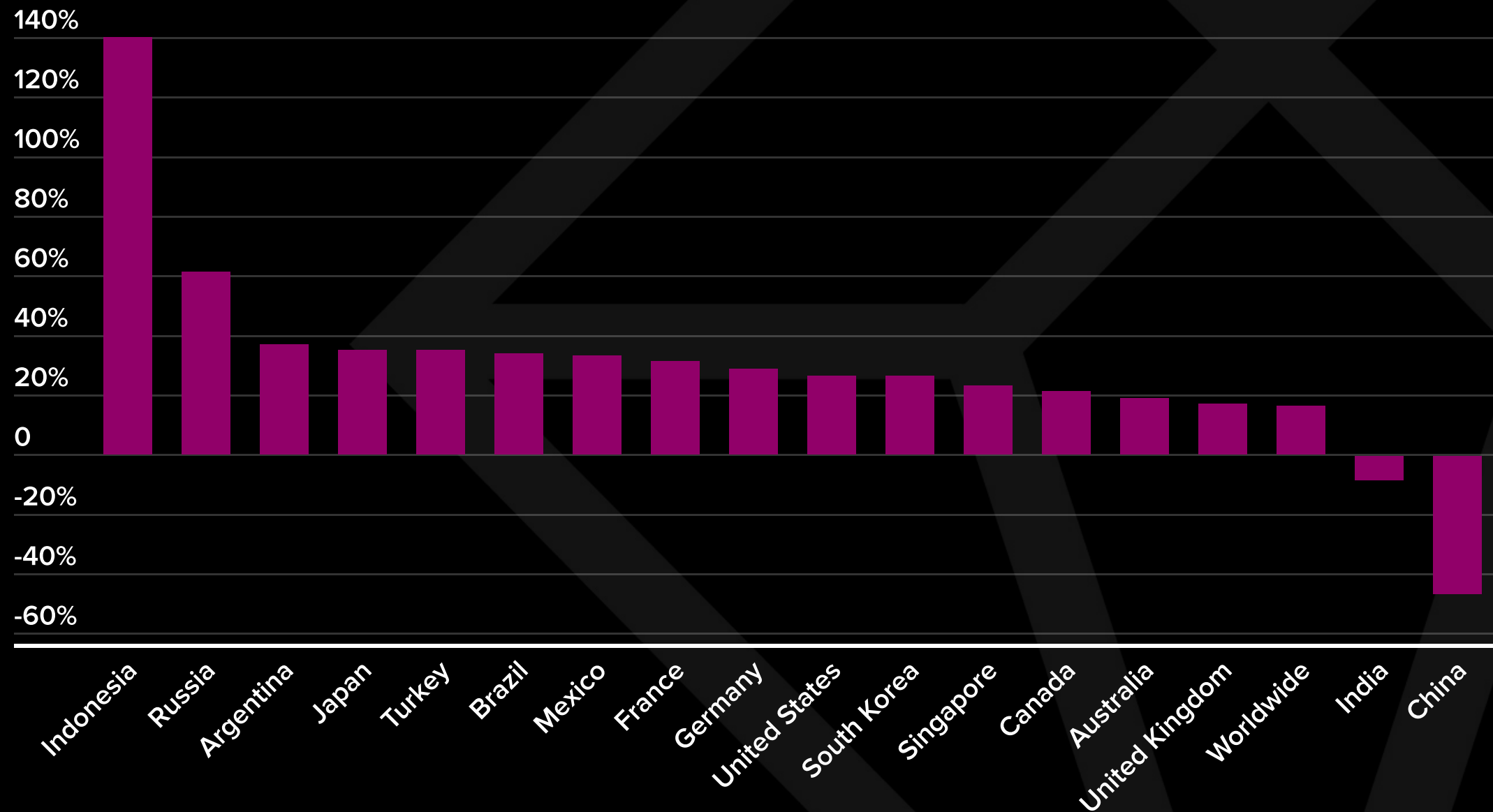


Learn More: [Uncover the Top Shopping Apps by Change in Yearly Downloads](#)

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.

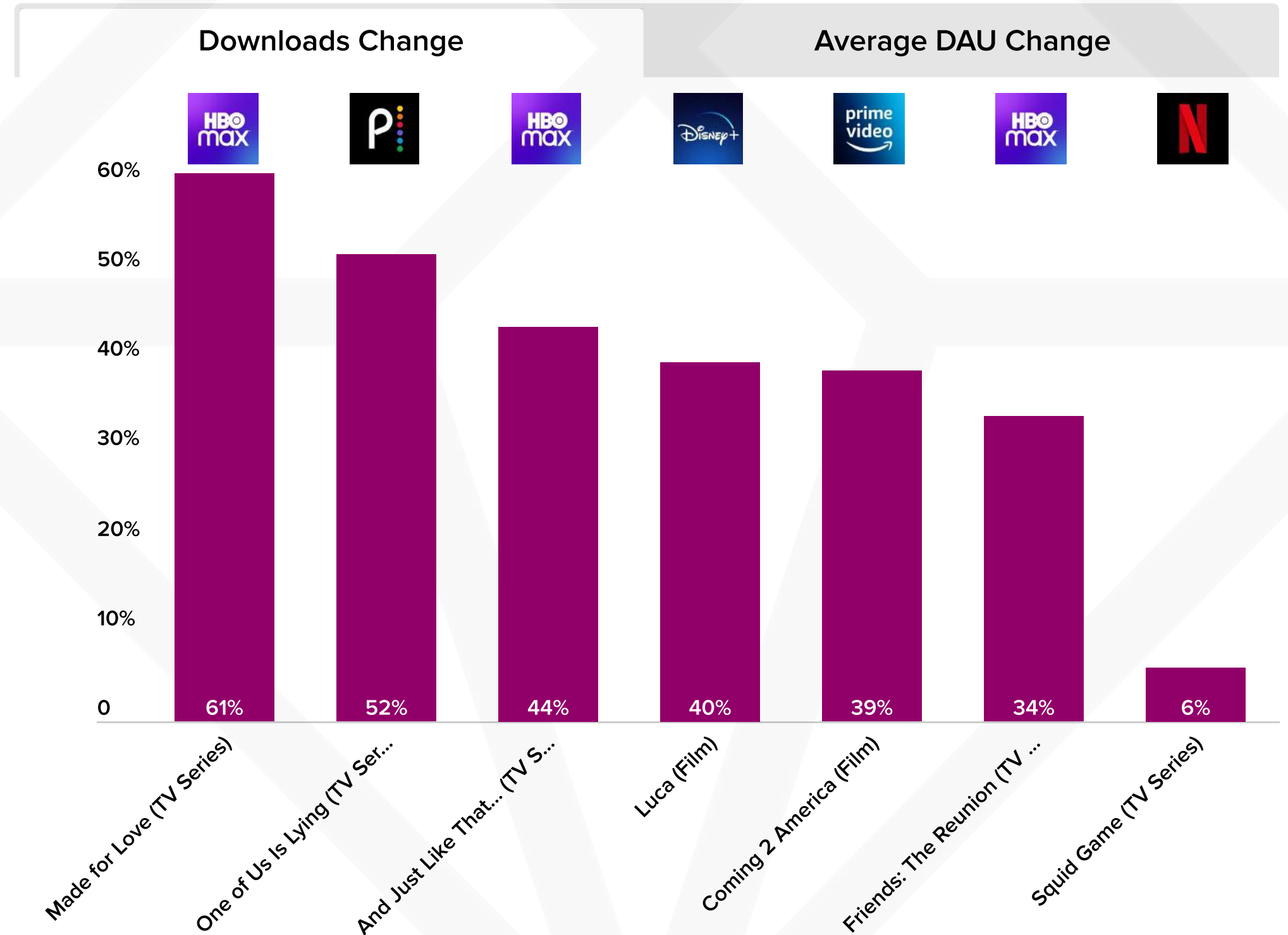
Exclusive Content Releases Drive Spikes in Video Streaming App Downloads Amidst Increased Competition in 2021

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

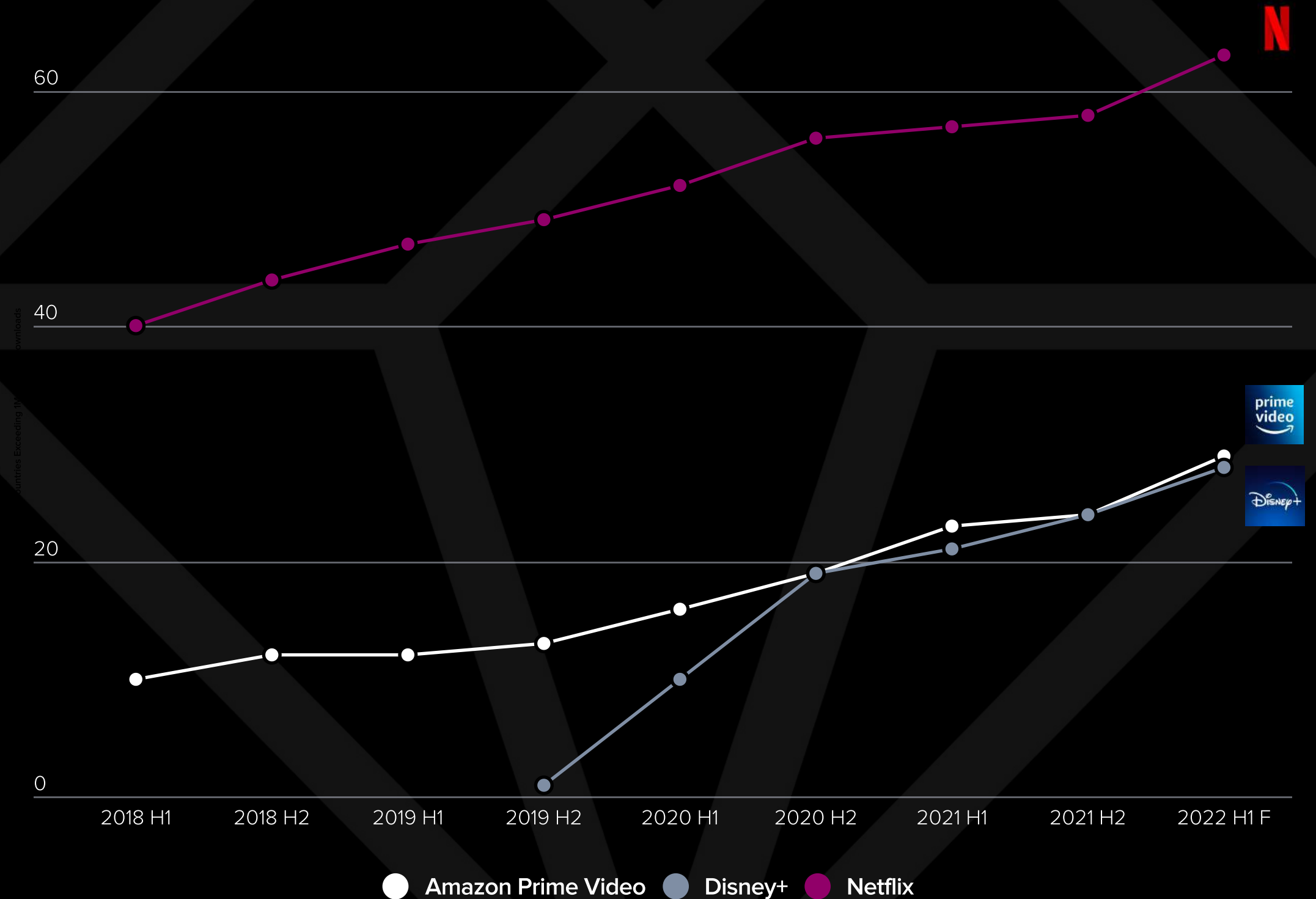
Netflix has the largest global footprint among video streaming platforms and a robust audience in each: with over 1 million local downloads in 60+ countries.

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.














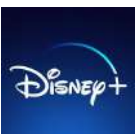























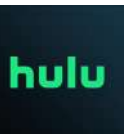
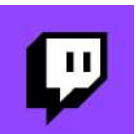






Track lifetime downloads and monitor the global strategies among top players in your competitive set.

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

| | 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 white square.

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

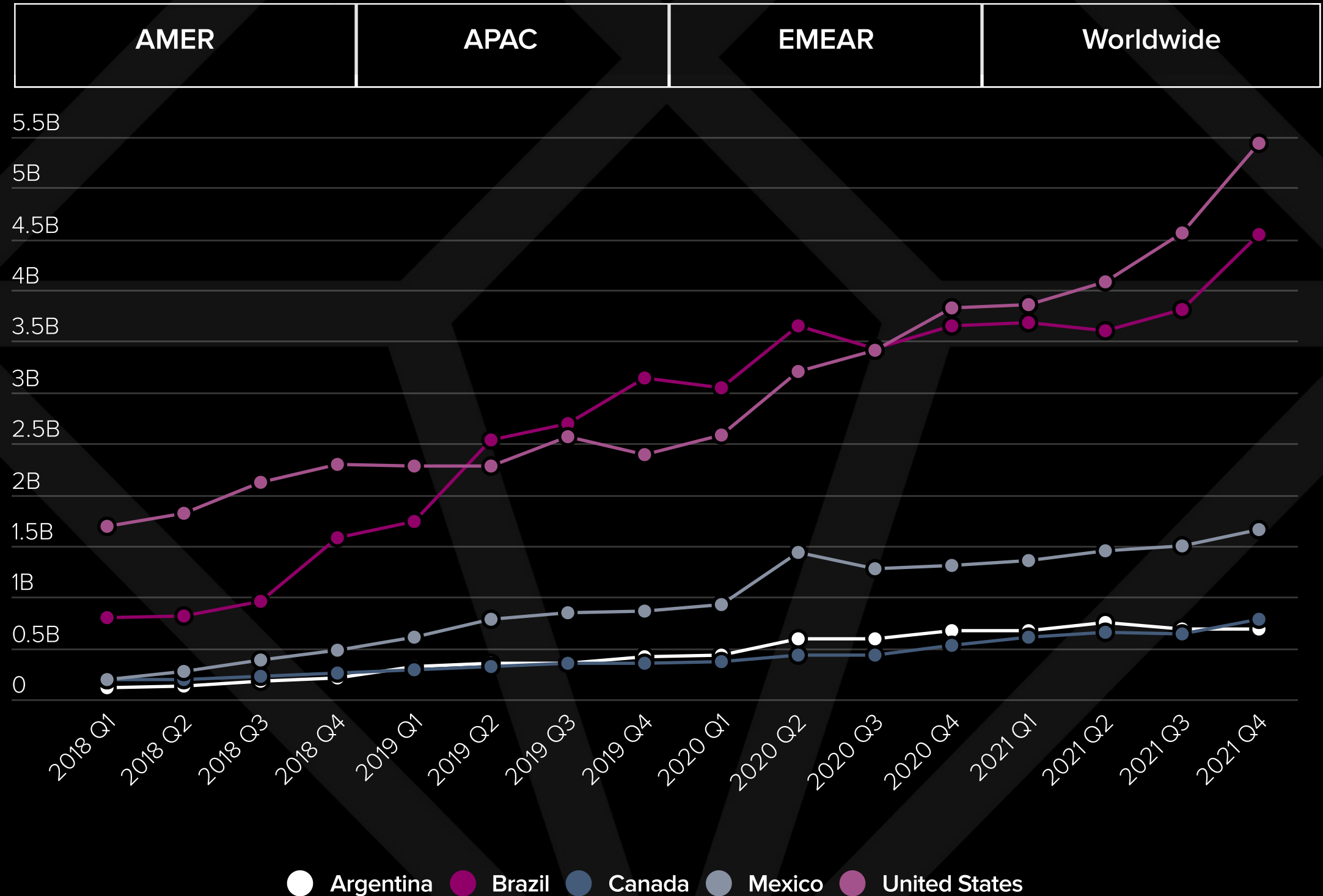
The pandemic expedited usage of Food & Drink apps across the world. Despite concerns for a slowdown following regional re-openings, an increase in both supply and in demand pushed market growth further than ever. Globally, users spent 49% more sessions YoY in 2021 in Food & Drink apps.

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-fulfillment, 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 >



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

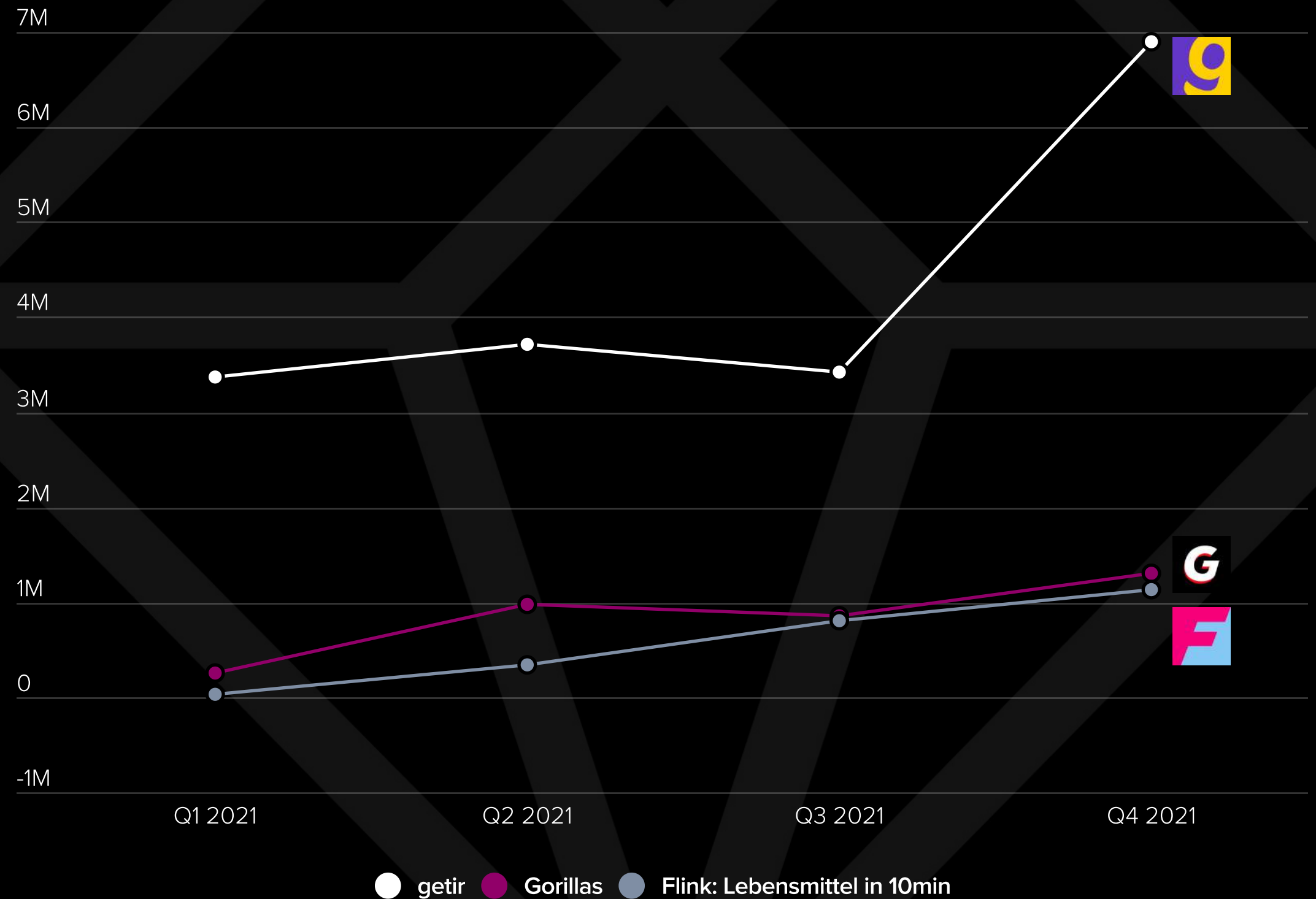
In 2020, consumers wanted delivery. In 2021, consumers wanted delivery...now. Hyper-fast grocery delivery apps grew at speeds faster than their delivery times.

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.




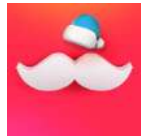











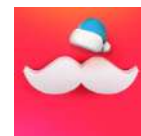
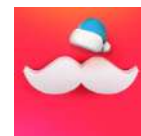
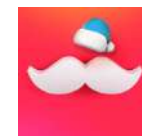













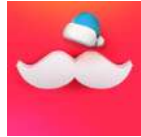
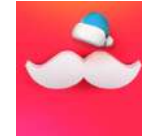












Trend Spotlight: Rapid Delivery Apps See Strong Growth in Quarterly Downloads Worldwide



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

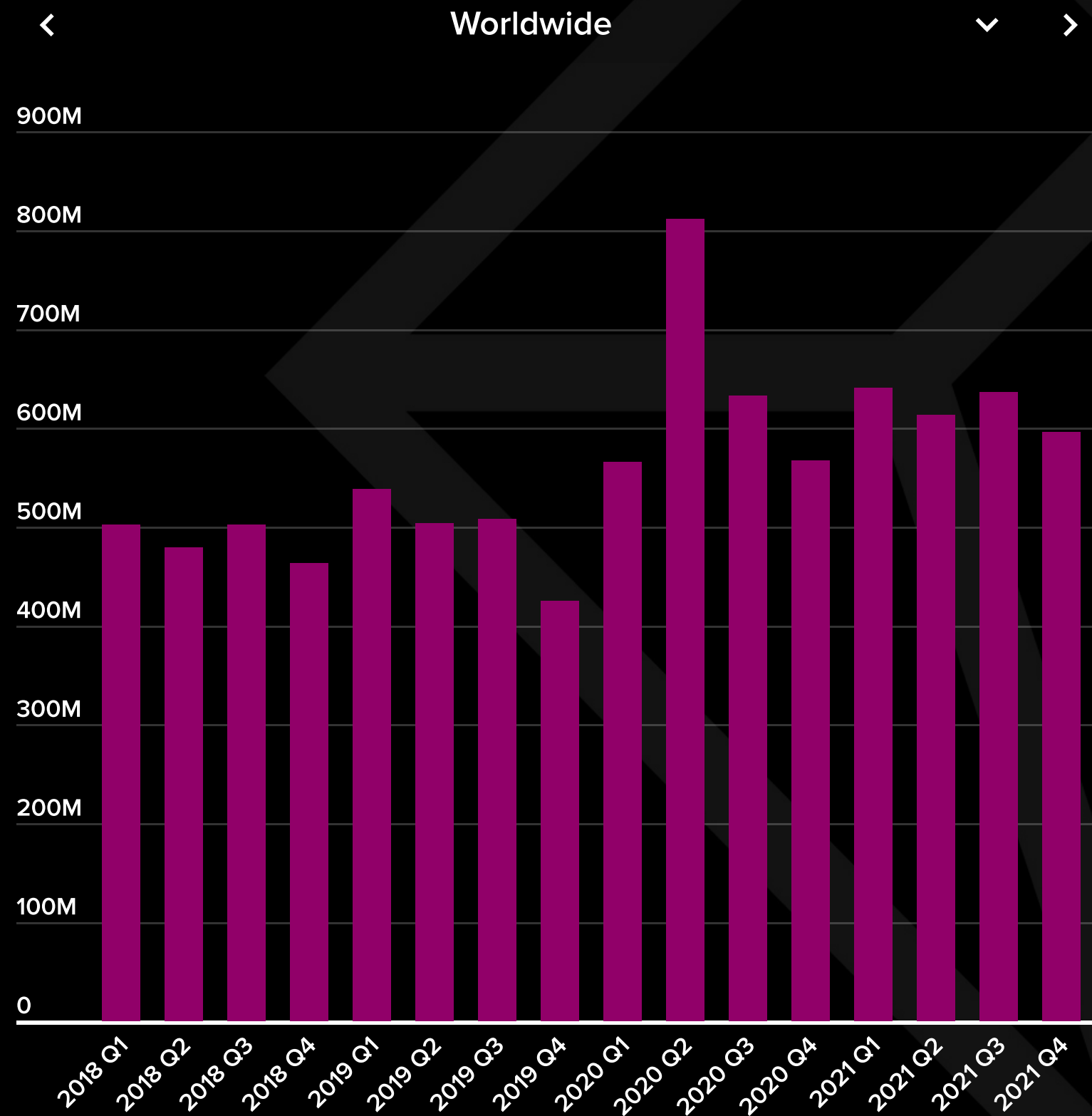
In 2021, mobile apps became more integrated in our daily lives as people aimed to enrich their lives while staying at home amidst Covid-19. We believe this trend will continue as mobile apps become more tailored to meet individual consumer needs. In the healthcare domain, we believe that more people 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

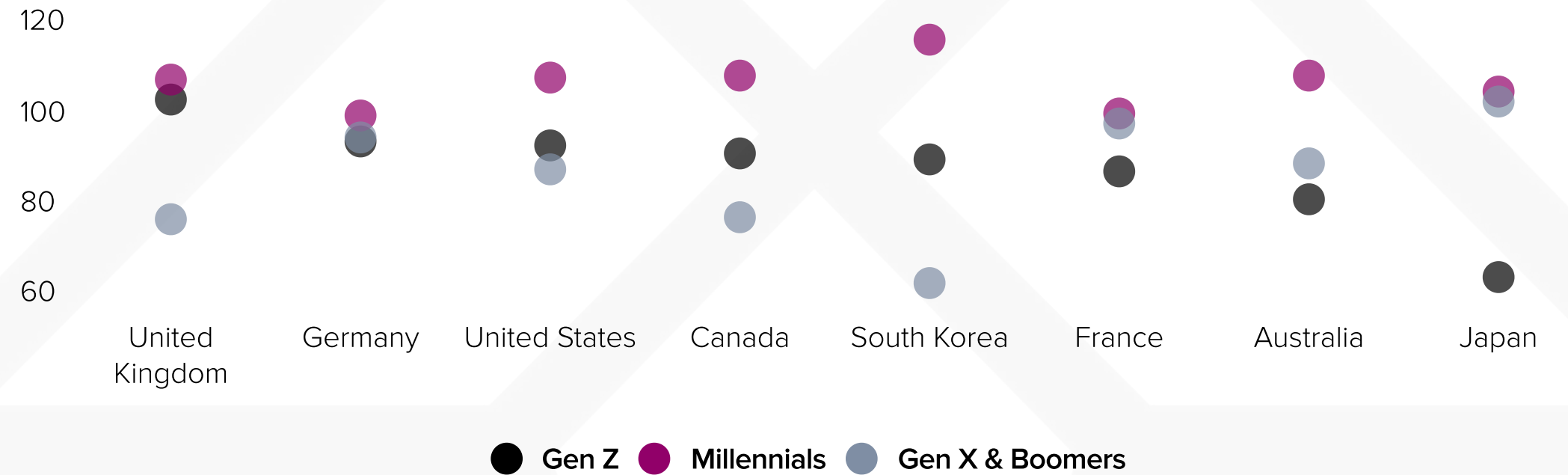
The most differences in generational use of Health & Fitness apps emerged in South Korea, with the least in Germany.

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.](#)

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

Index >100 Skews Towards Demographic Group



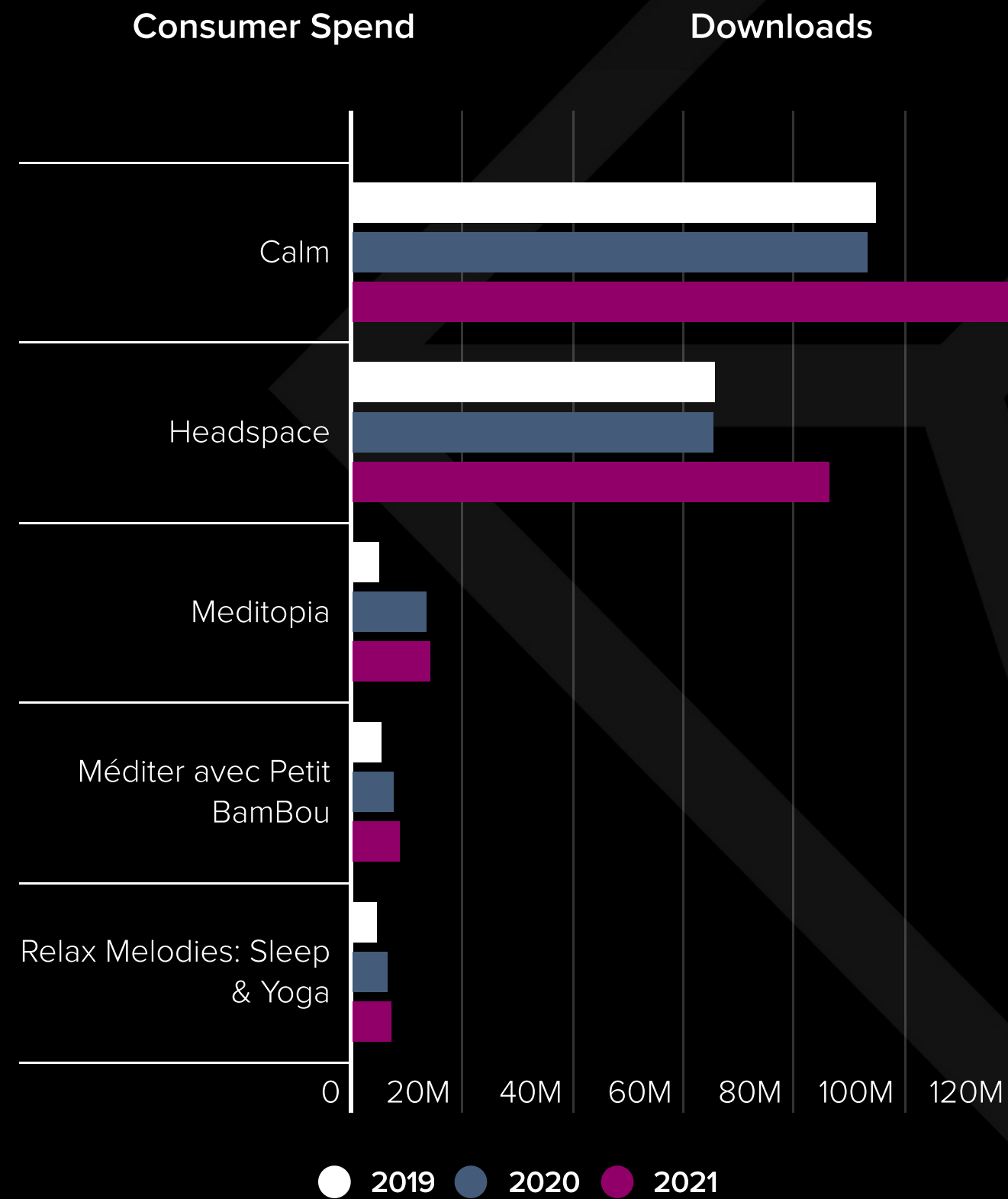
Top Apps by MAU by Likelihood of Use

Australia

| Gen Z | Millennials | Gen X & Baby Boomers |
|-----------------------------------|-------------------------------|--------------------------|
| 1 Flo Period & Ovulation Tracker | 1 ABISHKKING Period Calendar | 1 COVIDSafe |
| 2 Clue - Period Tracker | 2 Check in TAS | 2 Coronavirus Australia |
| 3 Headspace | 3 Bupa Australia | 3 Fitbit |
| 4 ABISHKKING Period Calendar | 4 Medibank Mobile | 4 Garmin Connect |
| 5 Medibank Mobile | 5 MyFitnessPal | 5 Check In CBR |

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



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.














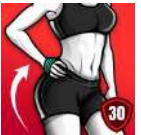

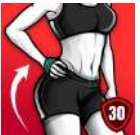







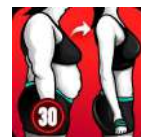




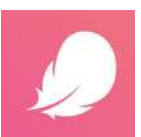
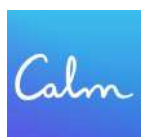
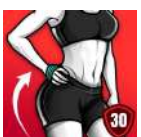

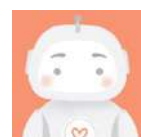












Calm remains the most downloaded meditation app both in 2020 and 2021 worldwide, with *Headspace* and *Meditopia* rounding out the top 3. Although downloads softened in 2021, both *Calm* and *Headspace* saw total time spent in their Google Play apps increase YoY by 12% and 15%, respectively.

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.](#)

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

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](#)

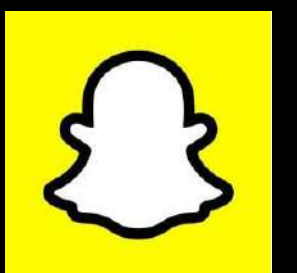
Source: App Annie Intelligence Note: Combined iOS and Google Play; China is iOS only; Market-level rankings

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

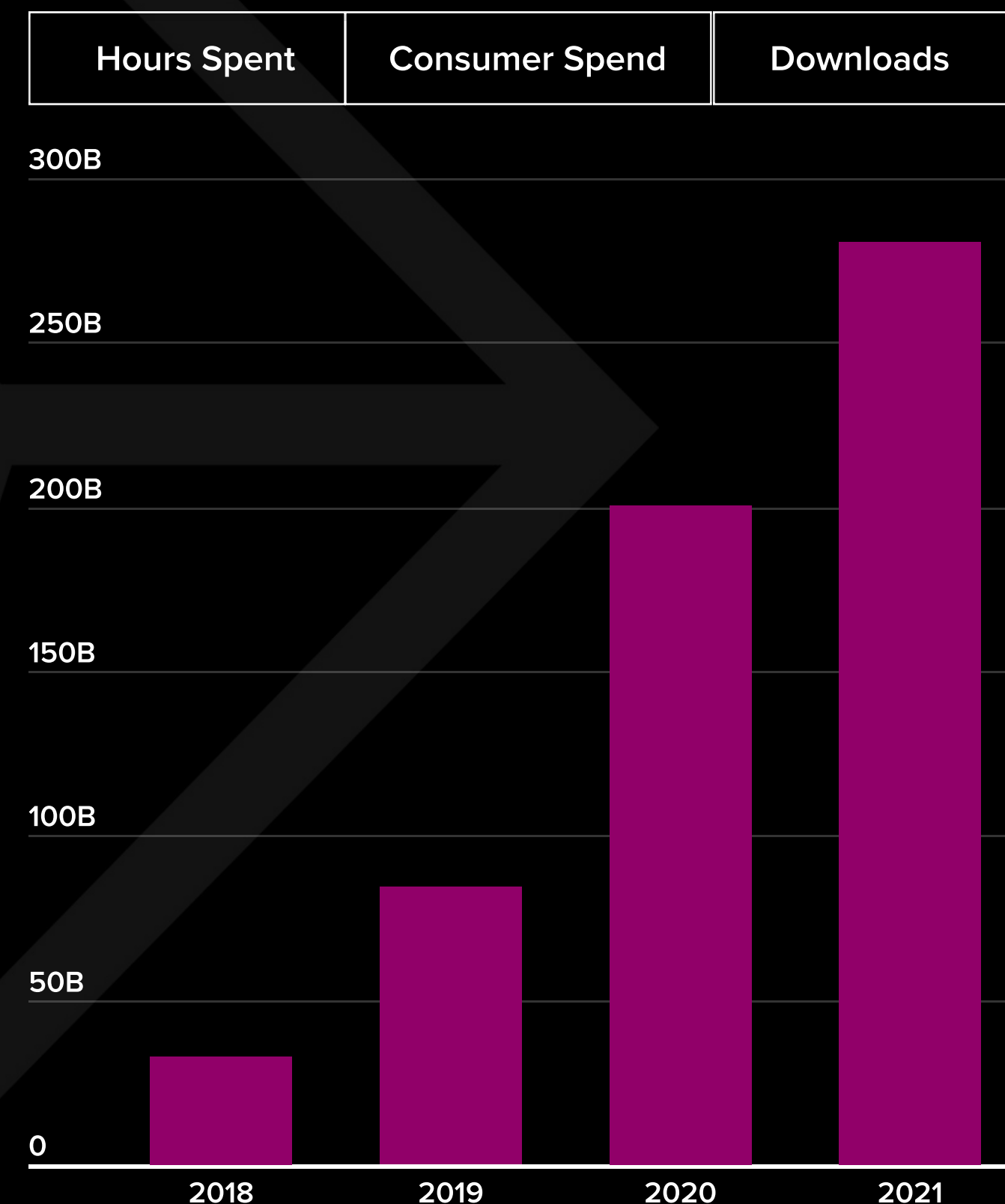
All Eyes on Live Streaming: Time Spent Grew 9x in 4 Years — Cultivating the Deepest Social Engagement

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.

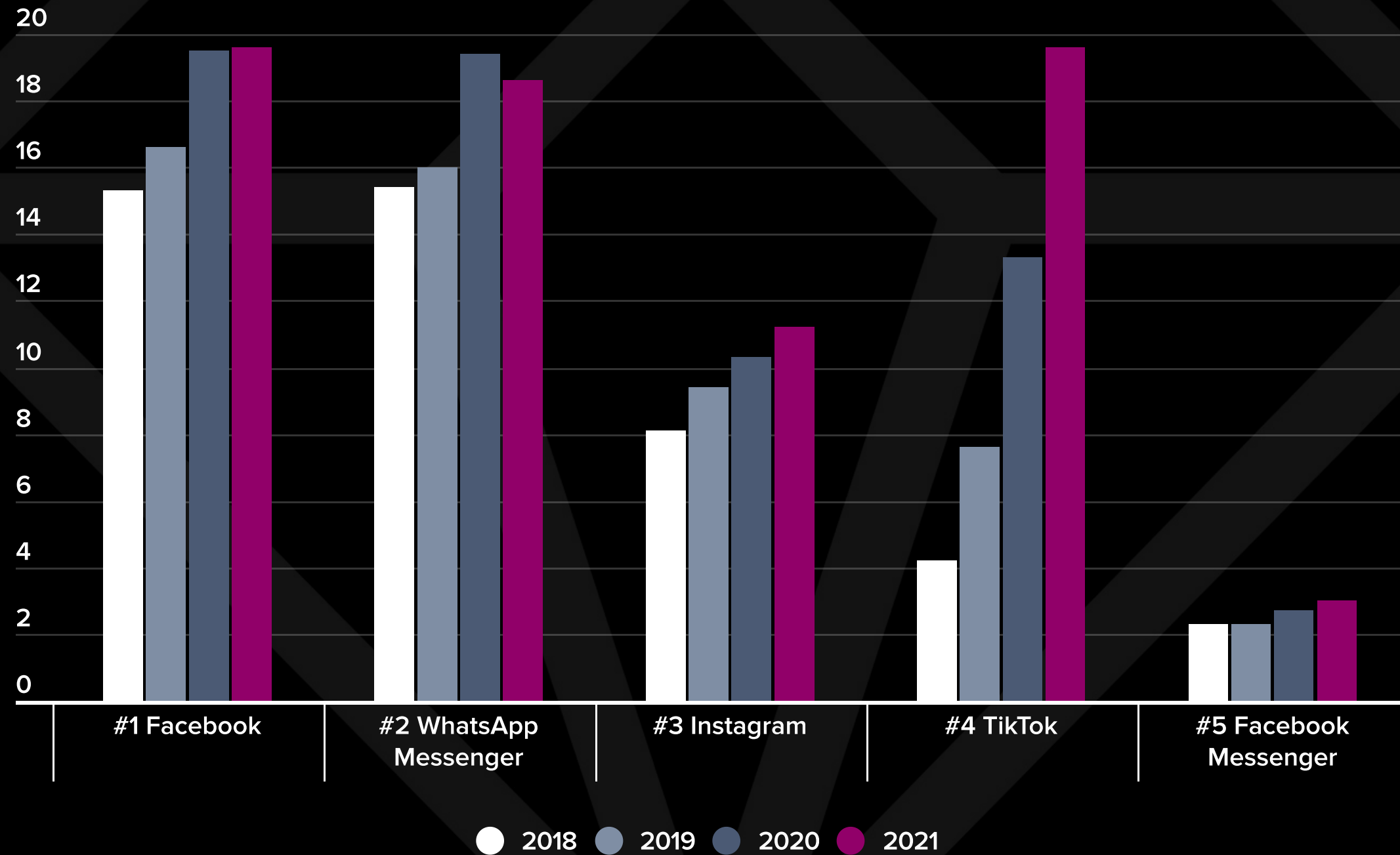
Global Growth of Live Streaming Apps
Among Top 25 Apps



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



● 2018 ● 2019 ● 2020 ● 2021

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

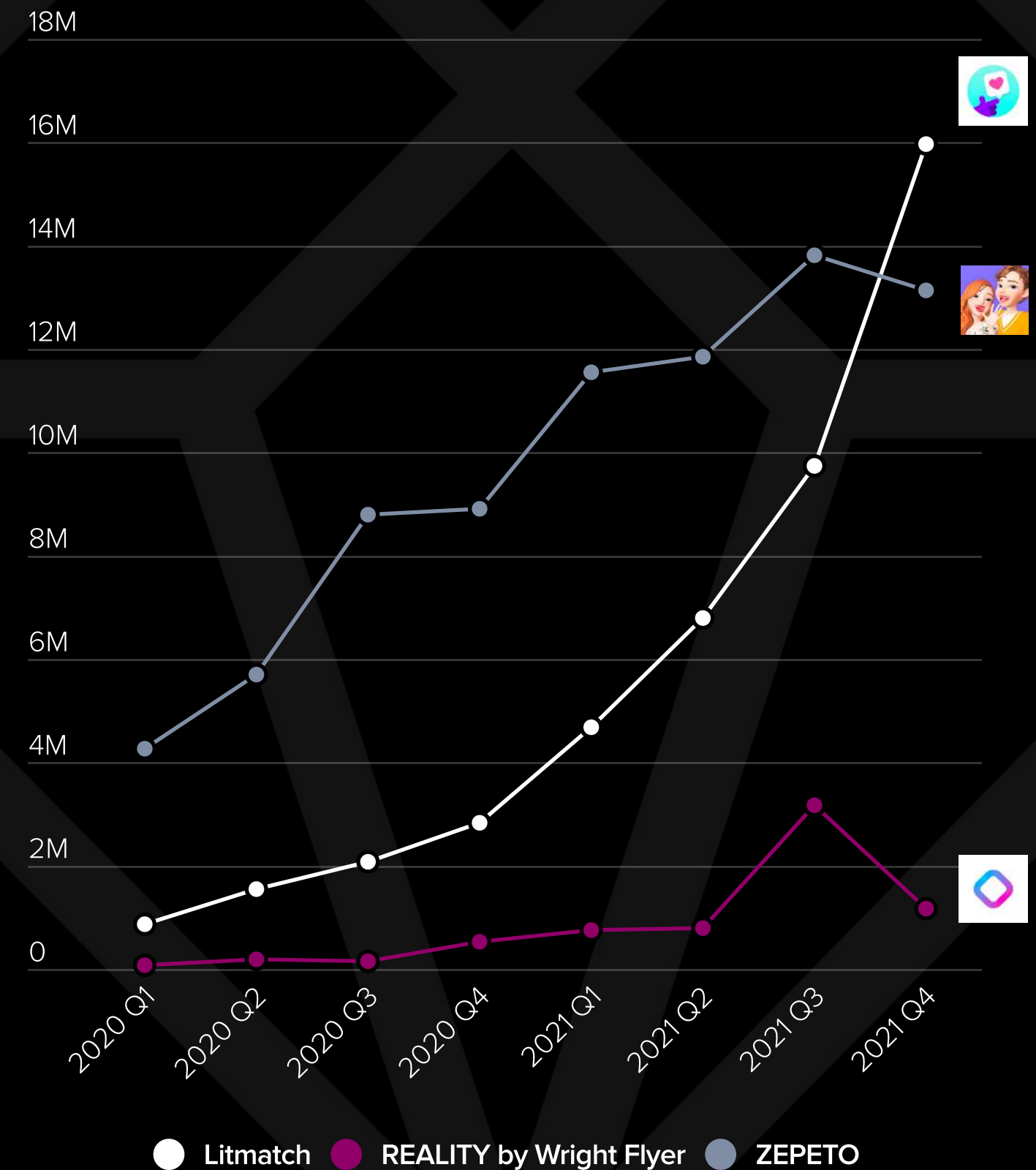
Emerging Trend: Avatar Apps Tap Into Increasing Demand for Metaverses: Social, User-Generated Content, Creativity

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.

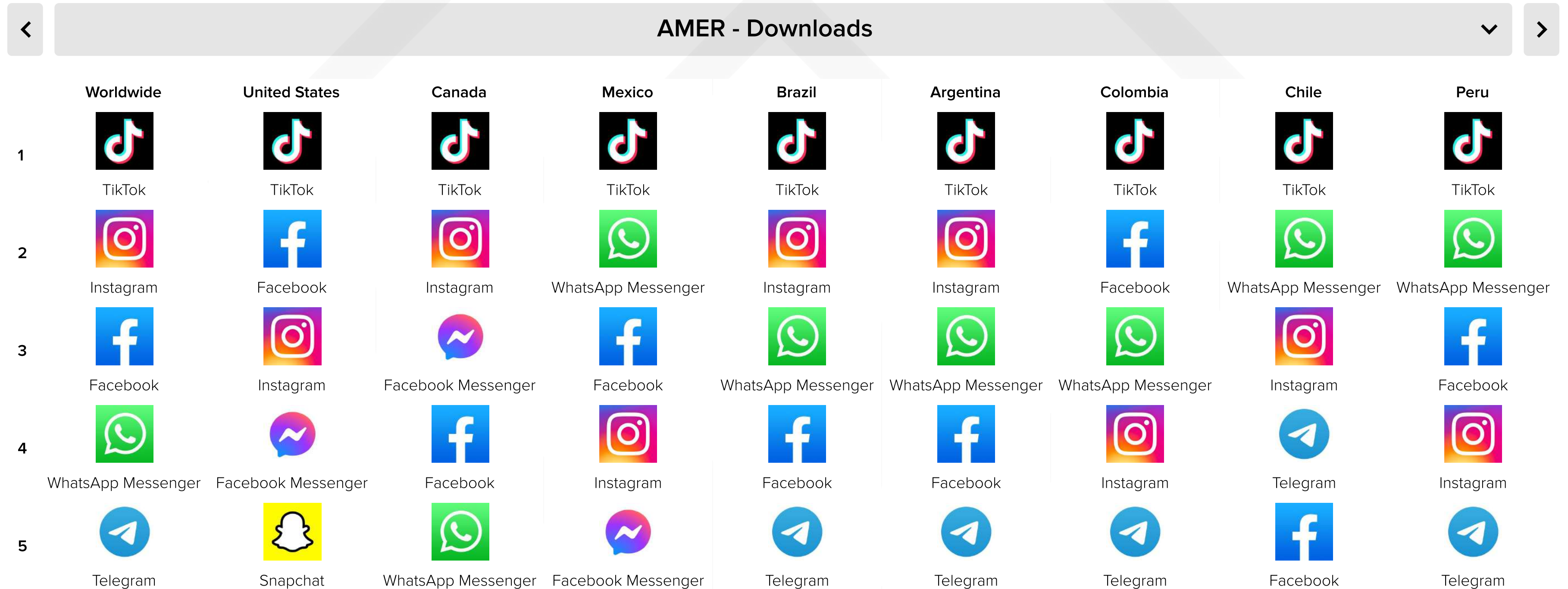
Creativity, creation and connection are at the core of growing interests in 2022. Mobile is the pulse of the cultural zeitgeist. Monitor rising stars to be among the first to capture shifts in these trends.

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



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

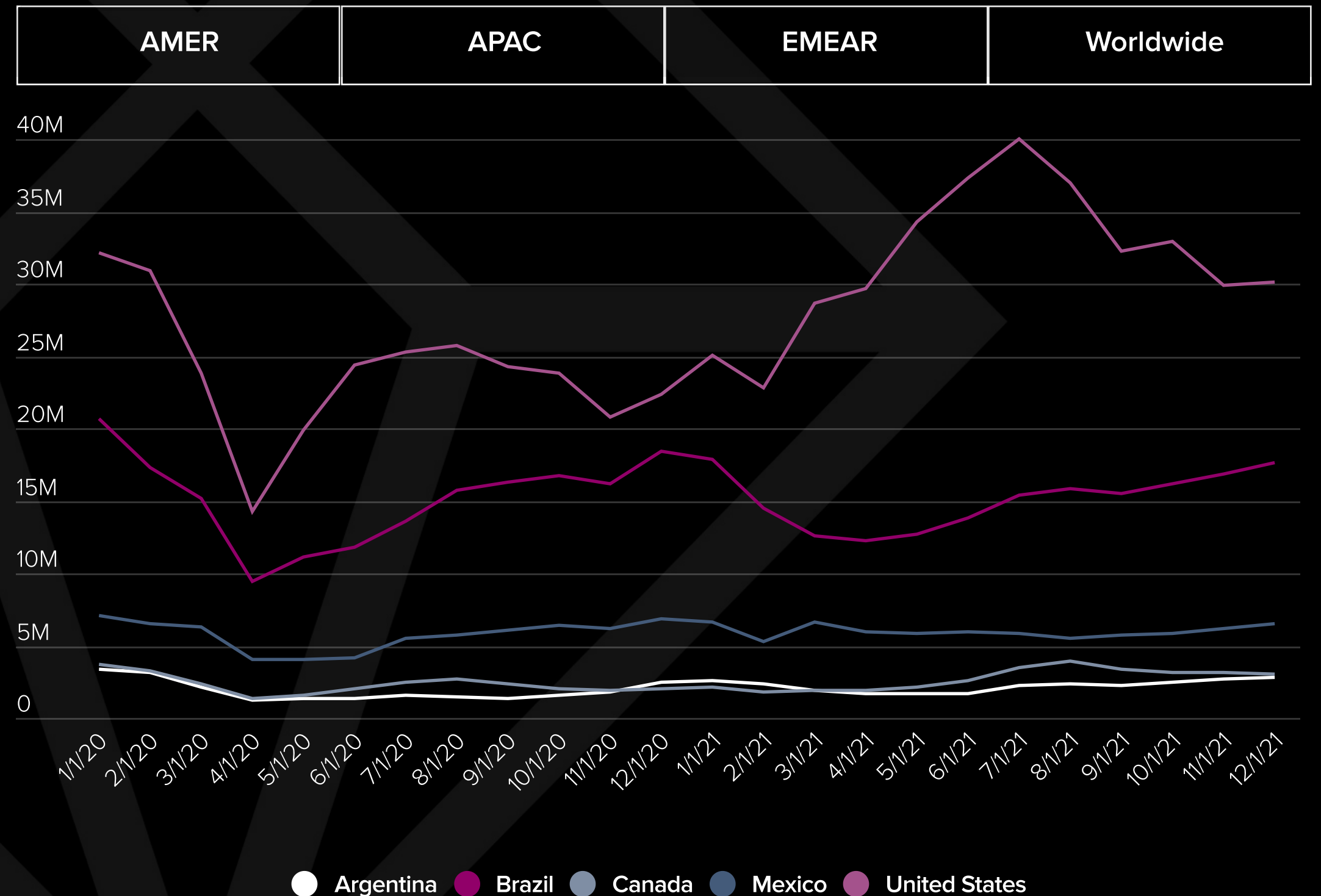
The second half of 2021 showed positive trends for travel on mobile. H2 2021 downloads hit 1.95 billion worldwide, nearing pre-pandemic levels of 2.08 billion in H2 2019.

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.

Monthly Downloads of Travel & Navigation Apps



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

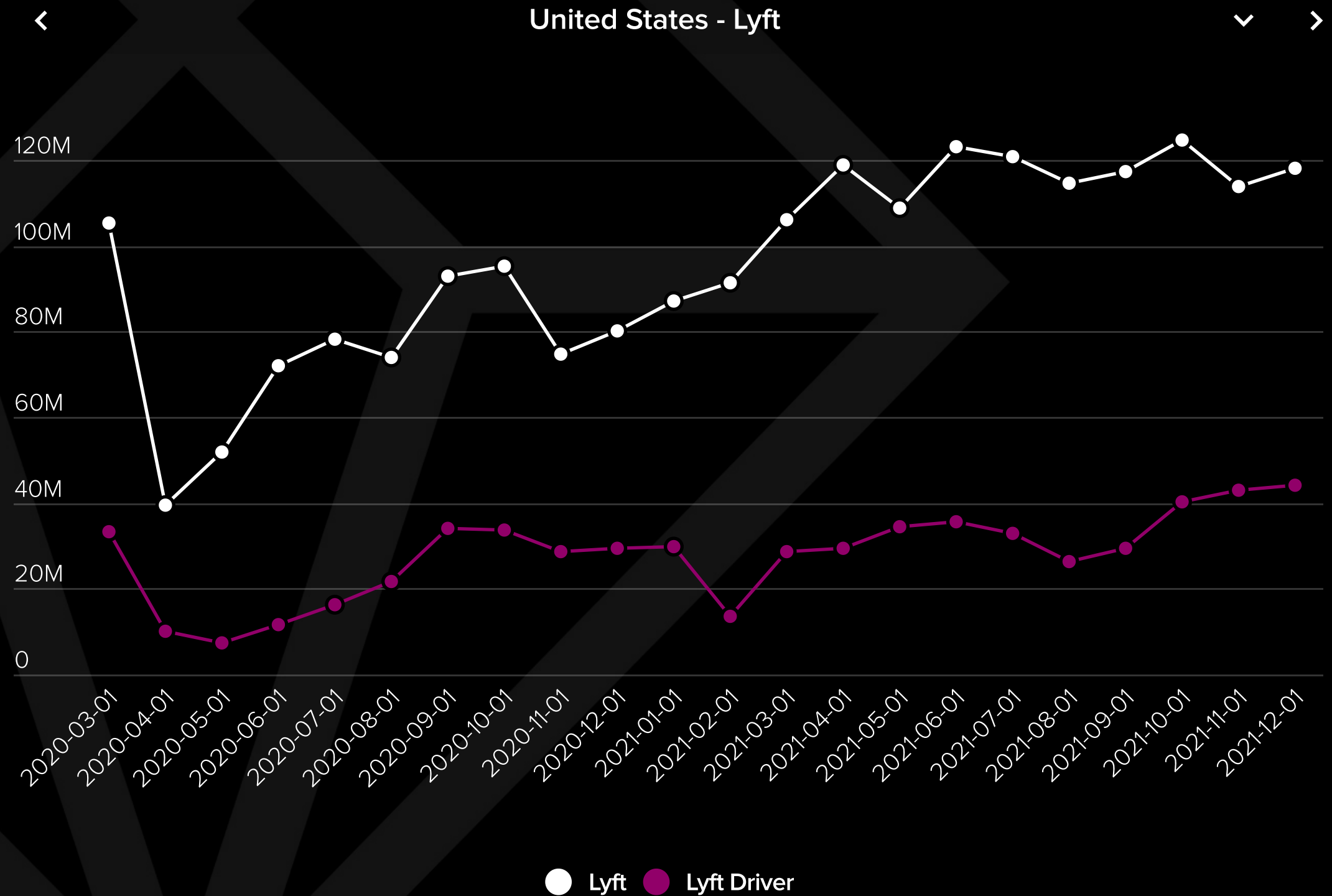
Drivers vs. Riders: Rideshare Supply & Demand Dynamics Differ Across Regions

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.

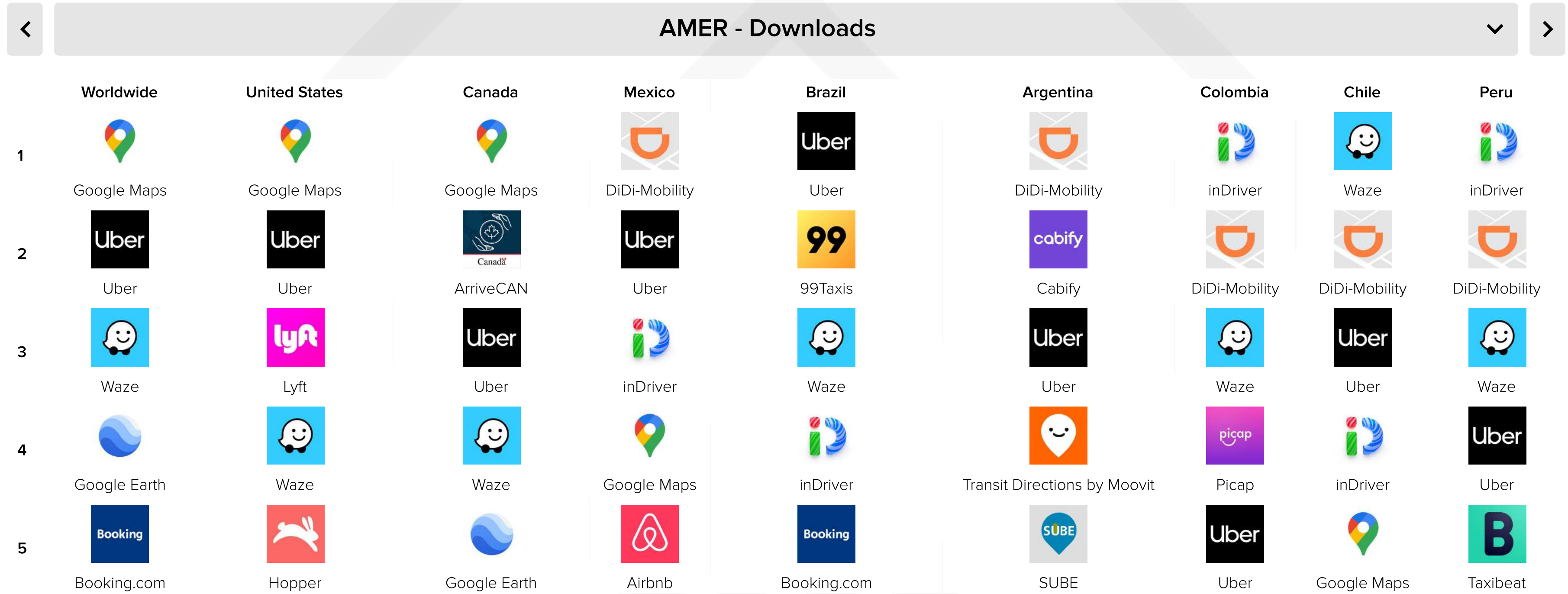
Marketplaces face the balancing act of supply and demand in real time. Monitor mobile data to keep track of market movement.

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



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

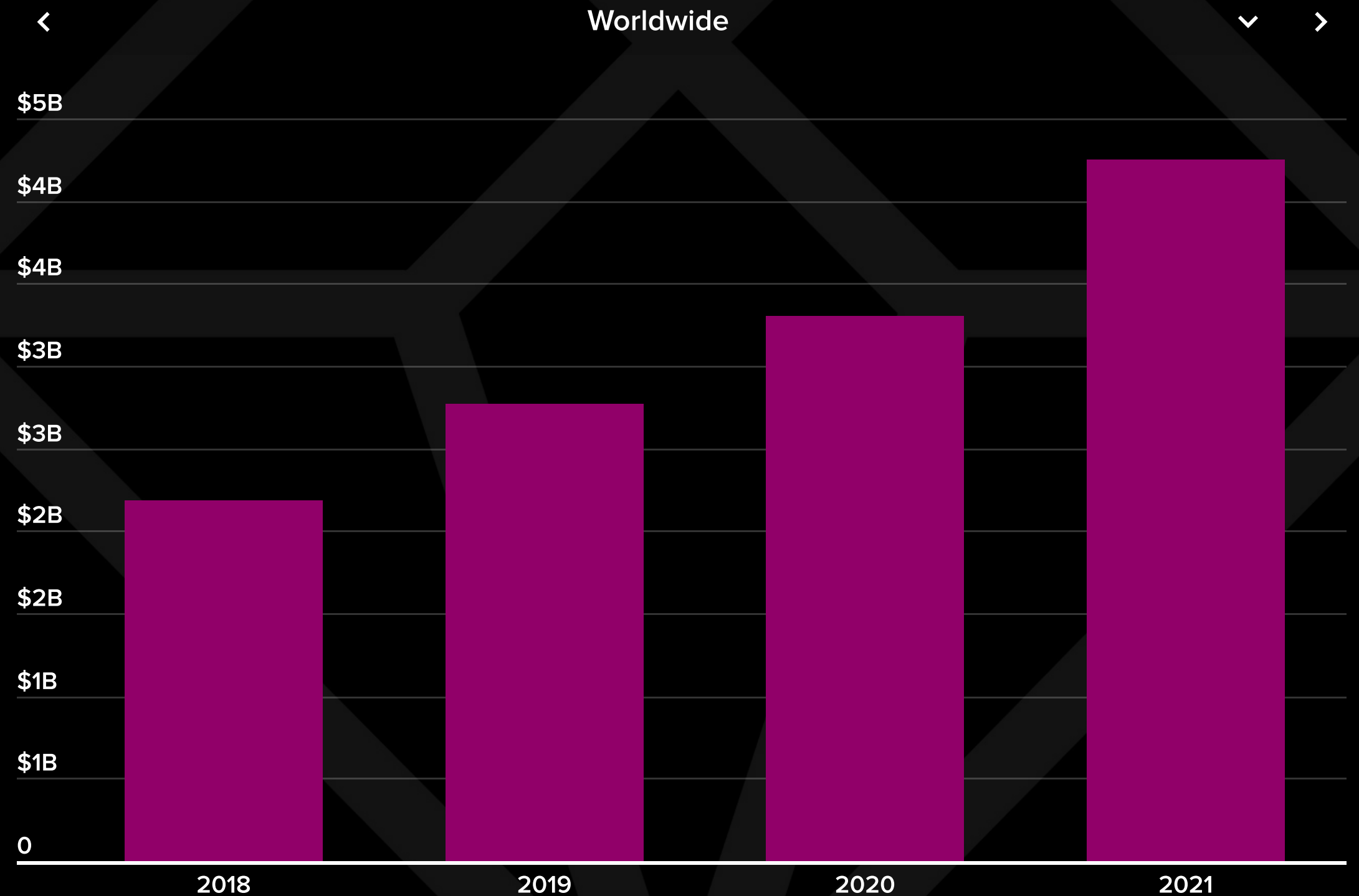
Worldwide Consumer Spend on Dating Apps Surged Past \$4B in 2021, Seeing an 95% Increase Since 2018 Despite the Pandemic

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

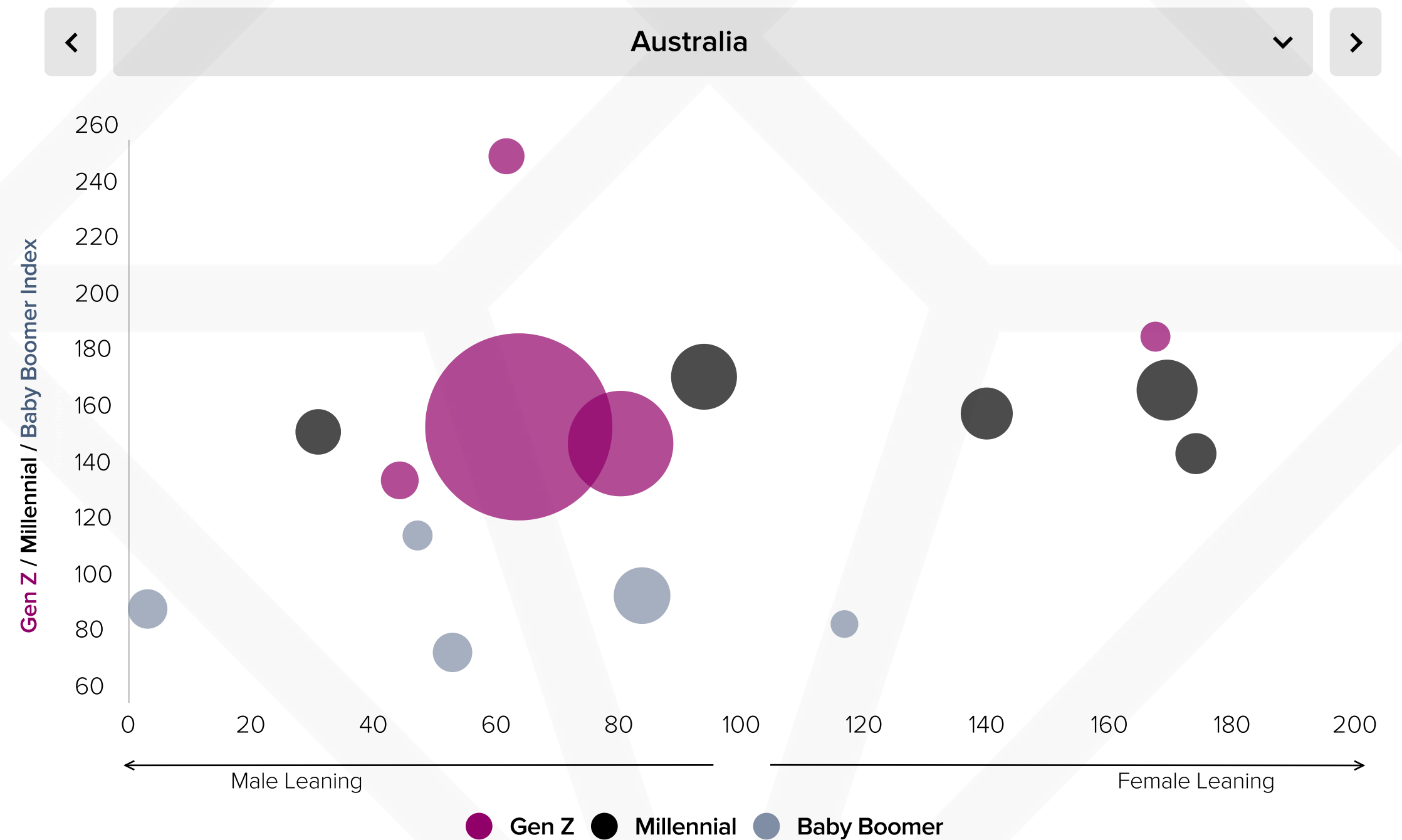
Taimi, *Hily*, and *Tinder* tend to be more popular among Gen Z in the US.

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

DATING

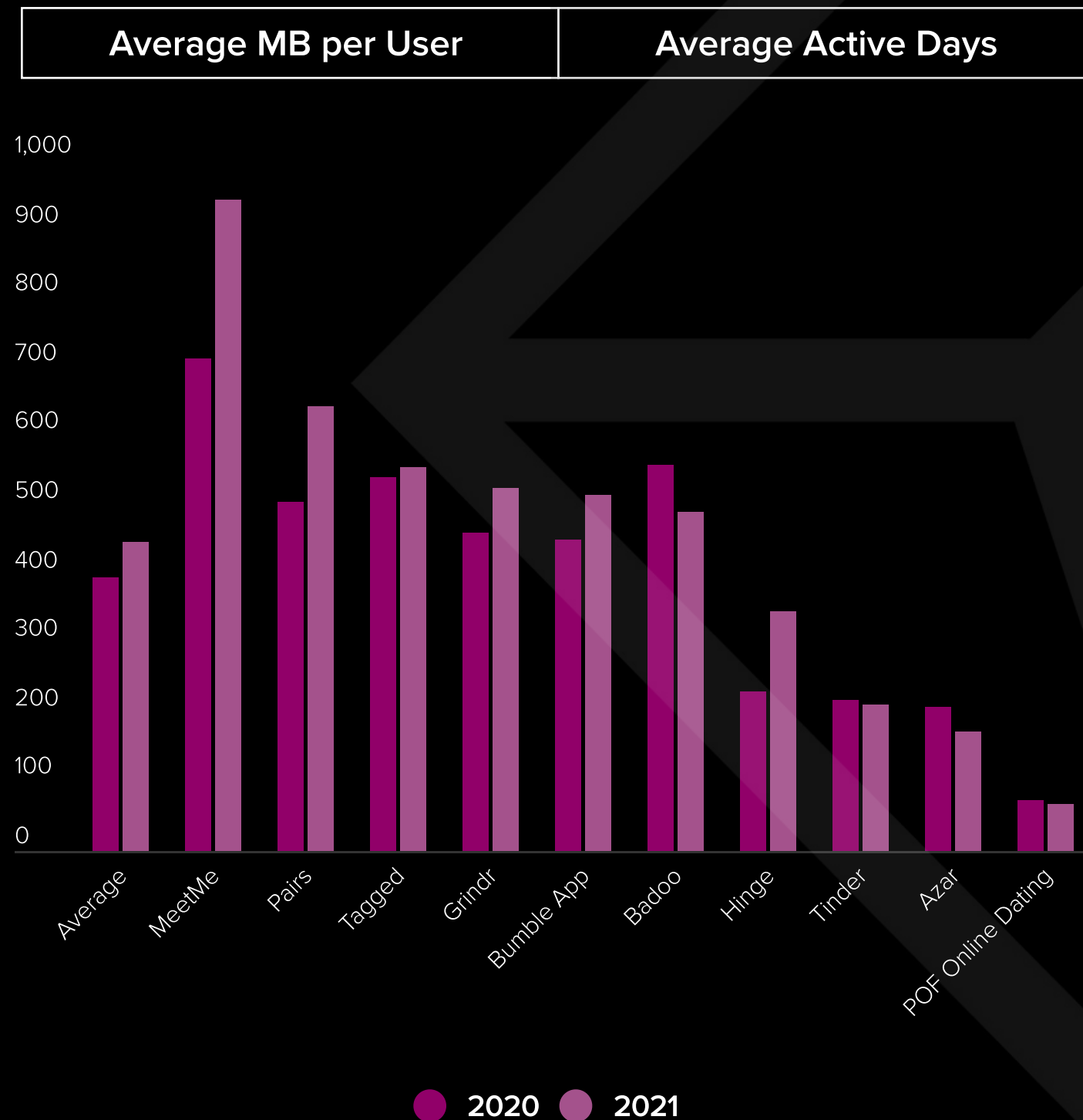
Among the Top 10 Dating Apps Worldwide by Consumer Spend, Most Apps Saw an Increase in Usage Two Years Into the Pandemic

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.

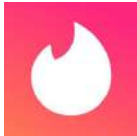
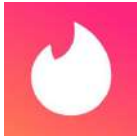

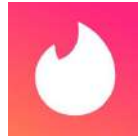
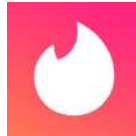
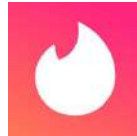
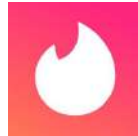
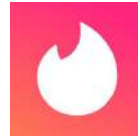
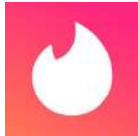



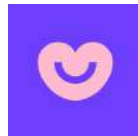
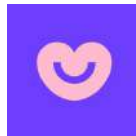
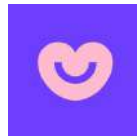
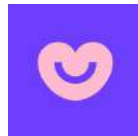
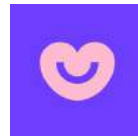








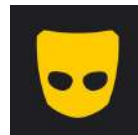







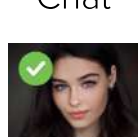


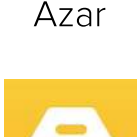


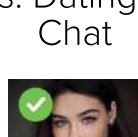
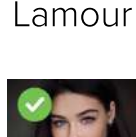
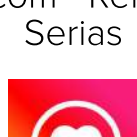


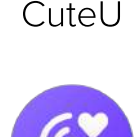
Understanding each dating app's target audience and user behavior is crucial to its success. [Explore engagement and monetization strategies in App Annie.](#)



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.

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 |  Lamour |  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

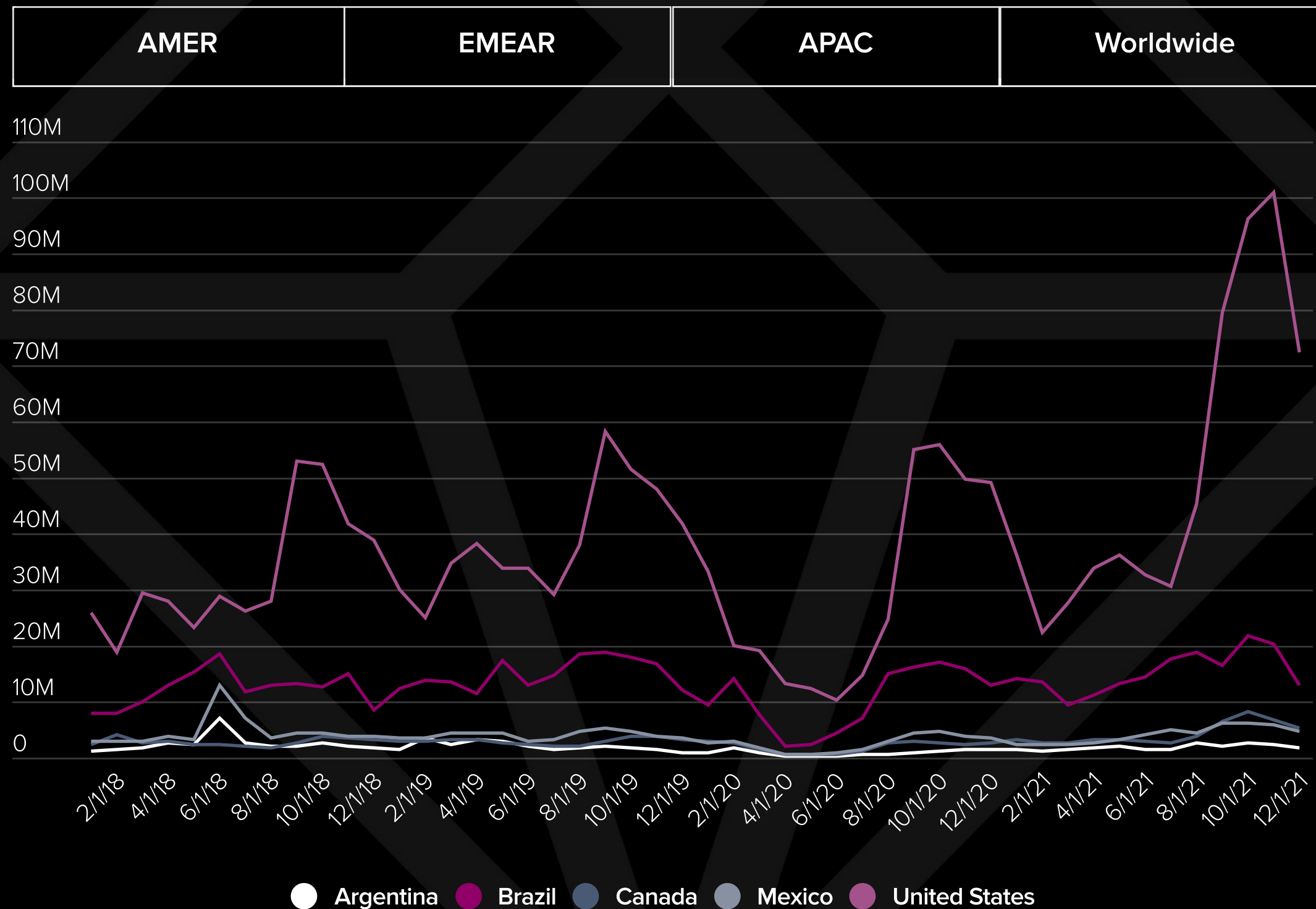
Other Industries Embracing Mobile

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 Championship in Europe, 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.

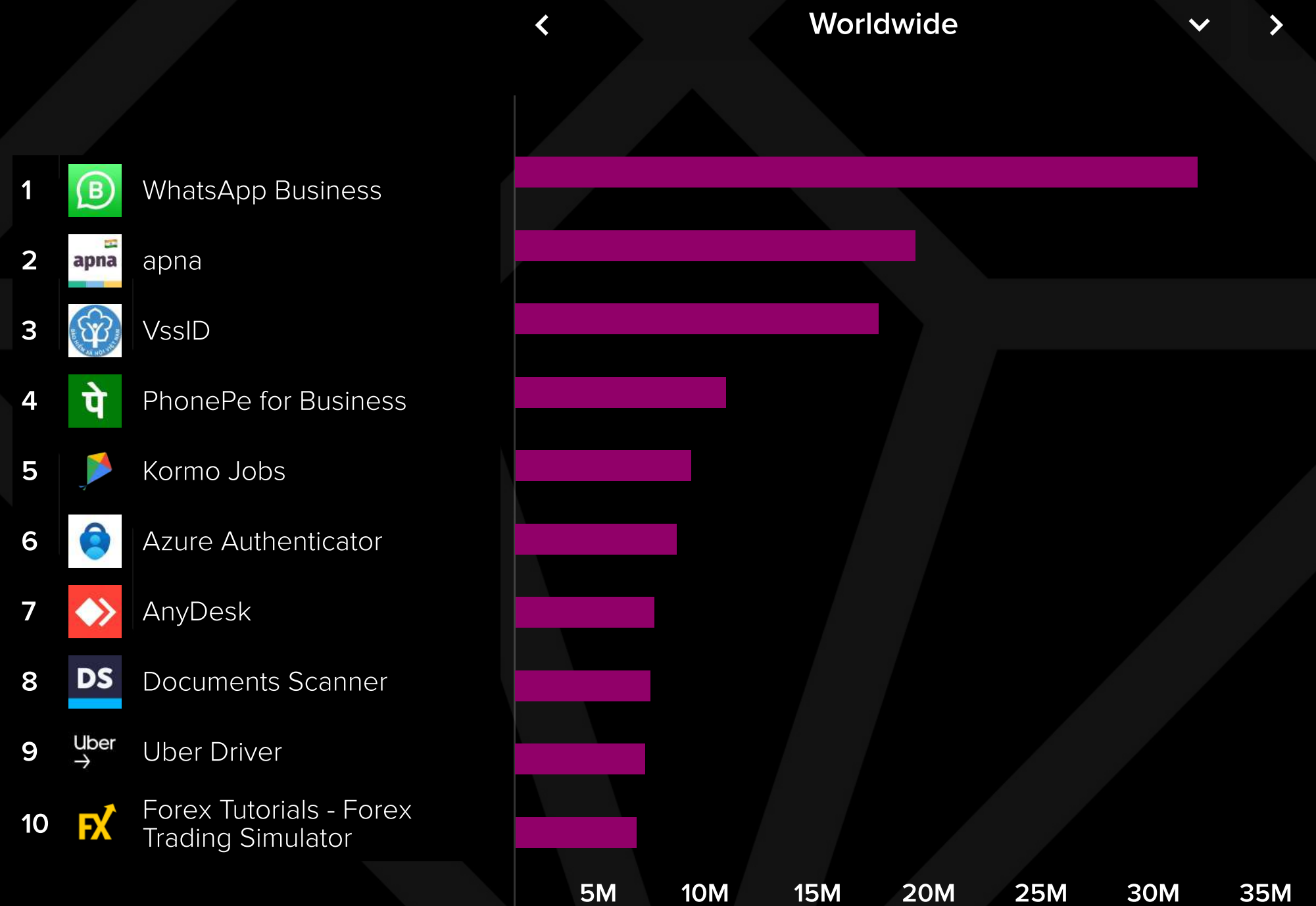
The Great Resignation? More Like The Mobile-Empowered Work Force

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

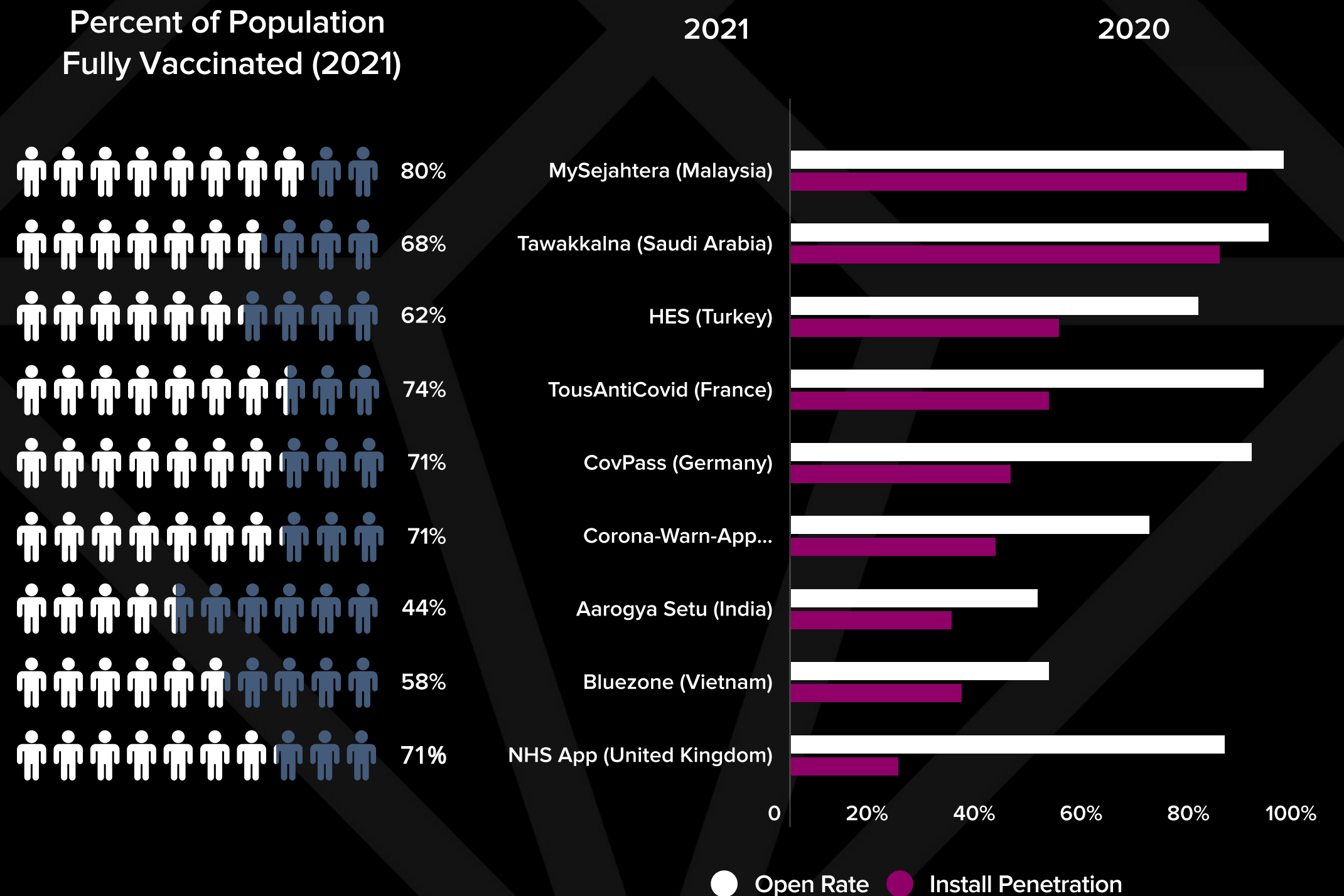
Vaccine Rollout & App Engagement Are Crucial Drivers of the Ongoing Effort to Combat Covid-19

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













2021 Rankings by Market | Top Apps

< Worldwide >











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

< Worldwide >











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

< Worldwide >

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

Worldwide

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  |

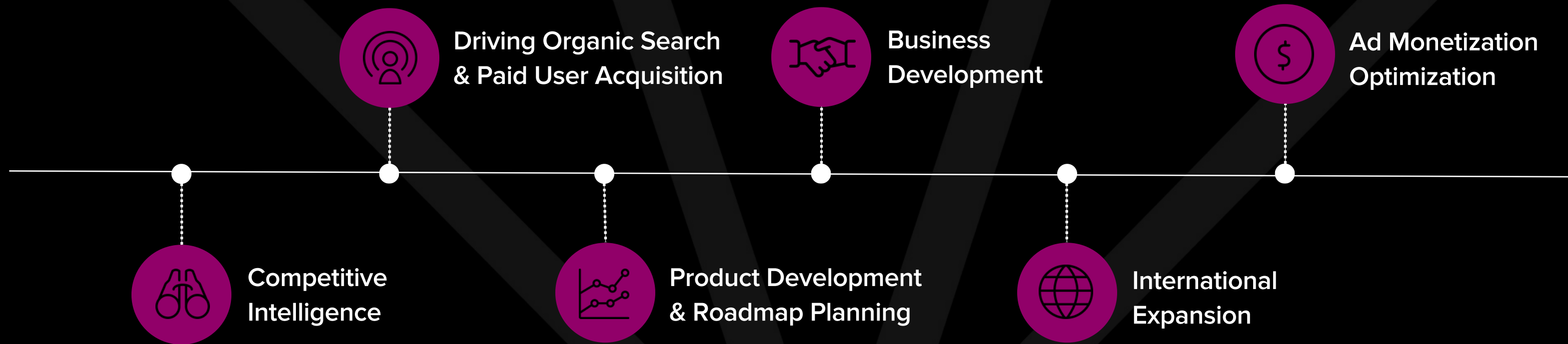
CONSUMER SPEND

| 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

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