Executive Summary

- **204B**: Worldwide Downloads in 2019
- **$120B**: Worldwide App Store Consumer Spend in 2019
- **3.7 Hrs**: Per day spent in mobile by the average user in 2019
- **825%**: Higher avg IPO valuation for mobile companies in 2019
- **60%**: Higher per user engagement by Gen Z vs older demos in 2019
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The Mobile Performance Standard

Through our mobile data and insights platform, we help create winning mobile experiences for those aspiring to achieve excellence.
Consumers Downloaded a Record 204 Billion Apps

- Annual worldwide downloads have grown 45% in the 3 years since 2016 and 6% year over year, which is particularly impressive given this excludes re-installs and app updates.
- Downloads are largely fueled by emerging markets, including India, Brazil and Indonesia.
- Consumers in *mature markets* like the US, Japan and Korea have seen download growth level off, but are still seeking out new apps. Downloads in 2019 alone topped 12.3B, 2.5B and 2B in the US, Japan and South Korea, respectively.

**Note:** iOS, Google Play, Third-Party Android in China combined
Consumer Spend Hit $120B, up 2.1x From 2016

- Games now make up 72% of all app store spend. Subscriptions in non-gaming apps fueled growth in spend, from 18% share in 2016 to 28% in 2019.
- China remains the largest market, making up 40% of global spend.
- Spend in both mobile gaming and non-gaming mobile subscriptions has fueled growth in mature markets like the US, Japan, South Korea and the UK.
- By 2023, the mobile industry is set to contribute $4.8 Trillion to global GDP.

Note: Spend is gross — inclusive of any percent taken by the app stores; iOS, Google Play, Third-Party Android in China combined.
MACRO MOBILE TRENDS

Mobile Is Our Go-To Device, Capturing 3 Hrs 40 Min Per Day

- Across the markets analyzed, consumers are spending 35% more time in mobile in 2019 than 2 years prior.
- Mobile-first emerging markets like Indonesia, Brazil and India continue to spend the most time in mobile each day.
- France, India and Canada saw strong growth with the average user spending 25% more time in mobile each day in 2019 than in 2017.

Note: Android phones
Mobile-First Companies Saw 825% Higher Avg IPO Valuation

- The 3 largest initial public offerings (IPOs) in 2019 were companies with mobile as a core focus of their business: #1 Alibaba Group ($167.6B USD), #2 Prosus & Naspers ($100B USD), #3 Uber ($82.4B USD).
- Mobile-focused companies had a combined $544B valuation, 6.5x higher versus companies without a mobile focus.
- These are further indications that mobile is essential to succeeding with customers in 2020 and beyond.
In-App Subscriptions Contribute to 96% of Spend in Top Non-Gaming Apps

- On iOS in the US, 97% of non-gaming consumer spend in the top 250 apps was driven by apps with subscriptions in 2019. On Google Play, this was slightly lower at 91%.
- Dating and video streaming apps have seen strong success with in-app subscriptions: Tinder, Netflix and Tencent Video topped the 2019 consumer spend chart for non-gaming apps.
- Publishers are taking advantage of the expanded monetization opportunities from in-app subscriptions. On Google Play, 79% of the top 250 apps by spend in the US monetized through in-app subscriptions in 2019. On iOS, this was higher at 94%.

“2019 was a year of explosive growth for PicsArt. App Annie data showed PicsArt was the #4 top grossing app worldwide in the photo and video category. With the rise of visual communication, we’re seeing more and more users - particularly millennials and Gen-Z’ers - willing to spend money for all-in-one editing apps with premium features like PicsArt.”

Jeff Roberto, VP Growth Marketing, PicsArt

Distribution of Consumer Spend in Top 250 Non-Gaming Apps Between Apps With Subscriptions and Apps Without Subscriptions
United States, 2019

- iOS - Subscription
- iOS - Non-Subscription
- Google Play - Subscription
- Google Play - Non-Subscription

Note: Combined iOS and Google Play combined
Mobile Is the Central Nervous System of Our Connected Lives

- In the US, there were over 106 million downloads of the top 20 IoT (Internet of Things) apps in 2019 alone.
- Mobile is set to be the brain for all devices and screens everywhere — whether streaming to Apple TV or Chromecast or controlling features in your car.
- The new decade ushers in the next phase of mobile, with smartphones serving as the primary interface through which we interact with the world around us.
- With major players in the industry working together to create IoT standardization, the industry is primed for growth. By 2025, there will be 25.2 billion connected devices, up 177% from 2018.

### Top IoT Apps in 2019 by Downloads, United States

<table>
<thead>
<tr>
<th>Rank</th>
<th>App Name</th>
<th>Developer</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Amazon Alexa</td>
<td>Amazon</td>
</tr>
<tr>
<td>2</td>
<td>Roku</td>
<td>Roku</td>
</tr>
<tr>
<td>3</td>
<td>Google Home</td>
<td>Google</td>
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<tr>
<td>4</td>
<td>Xbox</td>
<td>Microsoft</td>
</tr>
<tr>
<td>5</td>
<td>Ring - Always Home</td>
<td>Ring.com</td>
</tr>
<tr>
<td>6</td>
<td>Fitbit</td>
<td>Fitbit</td>
</tr>
<tr>
<td>7</td>
<td>Android Auto</td>
<td>Google</td>
</tr>
<tr>
<td>8</td>
<td>HP All in One Printer Remote</td>
<td>Hewlett-Packard</td>
</tr>
<tr>
<td>9</td>
<td>Amazon Fire TV Remote</td>
<td>Amazon</td>
</tr>
<tr>
<td>10</td>
<td>DIRECTV</td>
<td>AT&amp;T</td>
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<td>11</td>
<td>PS4 Remote Play</td>
<td>Sony</td>
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<td>Rokie - Roku Remote</td>
<td>Kraftwerk 9</td>
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<tr>
<td>13</td>
<td>Nest</td>
<td>Google</td>
</tr>
<tr>
<td>14</td>
<td>Samsung Gear</td>
<td>Samsung Group</td>
</tr>
<tr>
<td>15</td>
<td>Bose Connect</td>
<td>Bose</td>
</tr>
</tbody>
</table>

Note: Combined iOS and Google Play
MACRO MOBILE TRENDS

Don’t Miss Out: Gen Z Has 60% More Sessions Per User in Top Apps Than Older Demographics

- Gen Z is expected to surpass Millennials as the largest generation by the end of 2019, comprising roughly **32%** of the population.
- It is imperative to win Gen Z on mobile, or risk missing out on a mobile-native generation of consumers.

Gen Z’s Mobile Engagement in 2019

- **3.8 HOURS** spent per app per month per user among top 25 non-gaming apps on average.
- **150 SESSIONS** per app per month per user among top 25 non-gaming apps on average.

“Millennials and Gen Z have over $1 trillion in direct spending power, and will continue gaining influence in 2020 and beyond. In order to reach them, marketers need to take advantage of immersive mobile platforms like Snapchat, where we build engaging mobile experiences and drive powerful incremental reach among younger audiences.”

Kathleen Gambarelli, Group Product Marketing Manager, Snapchat

Note: Top 25 Apps by MAU excluding pre-installed apps, Android phones only, Average across Brazil, Canada, France, Germany, Indonesia, Japan, South Korea, UK, US.
2020 Is Set to Be Mobile’s Biggest Year, With Advertising Fueling Revenue

- Mobile ad spend to reach $240B as brands harness mobile’s potential.
- The streaming wars will heat up in 2020 and consumers will decide where they spend their 674B hours on mobile.
- Apple Arcade and Google Play Pass will result in innovative new games for consumers and new revenue streams for publishers.
- 5G is the next battleground, and gamers will be first to reap the rewards.
- Consumer and mobile ad spend to top $380 billion globally in 2020.
- View our Top 5 Predictions for 2020.

"As most growth marketers know all too well, driving performance through programmatic channels, be it CPA, ROAS or LTV, comes down to two things: (1) having a broad set of high quality unbiased, fraud-free user data, and (2) a rigorous practice for building and testing ad creatives. To successfully scale UA on mobile, marketers must invest equally in each."

Dennis Mink, VP Marketing, Liftoff
Mobile Gaming Is the World’s Most Popular Form of Gaming

- Mobile games in 2019 saw 25% more spend than in all other gaming combined.
- *Call of Duty: Mobile* and *Mario Kart Tour* launched on mobile in 2019 — evidence of console migrating to mobile to capitalize on the larger market.
- Mobile gaming extended its global lead in consumer spend to 2.4x PC/Mac gaming and 2.9x home game consoles in 2019.
- Mobile has democratized gaming, allowing for a portable gaming console to be in the pocket of nearly every consumer.
- Mobile gaming is on track to surpass $100B across all mobile app stores in 2020.

Note: Other Gaming data from IDC; 2019 data for other gaming is projected, Mobile Gaming data is iOS, Google Play, Third-Party Android in China combined
Casual Arcade Games Contributed 47% of Games Downloads

- Games within Casual genres, led by Arcade and Puzzle, were the most downloaded globally in 2019. Since users tend to switch between multiple Casual Games, many companies leverage a portfolio of Casual Games to retain high user bases overall.
- Publisher Good Job Games had a breakout year with multiple Casual Games topping the charts. Fun Race 3D ranked #5 by global downloads in 2019, despite only launching in May.
- Core Games represented almost one-fifth of global downloads. Free Fire was the most downloaded Core Game of 2019, falling under the Action subgenre.

“One of our crucial pillars of performance for 2020 is ASO. We achieved 200% growth in organic downloads of the 24 months ending Dec 2019 versus the 24 months prior across our portfolio of games. App Annie has been a critical partner in achieving and surpassing our goals.”

Nadir Garouche, Senior Growth Manager, Tilting Point
Core Games Represented Only 18% of Downloads, Yet 55% of Time Spent in Top Games

- Core Games tend to drive deeper engagement and longer gaming sessions. Mobile devices have made strides in power and hardware capabilities, enabling Core Games to flourish. 5G will make it even easier to play Core Games on-the-go.
- Increasingly, games incorporate gameplay and design elements across genres. It's important to analyze deeper gaming category information to understand this hybridization and how to leverage it.
- Within Core Games, Action represents the biggest portion of time spent. In 2019, PUBG MOBILE was the #1 Action Core Game by time spent on Android phones globally in 2019.
- Among Casual Games, Puzzle Games saw the most time spent in 2019. Anipop was the #1 Casual Puzzle Game by time spent, representing 10% of all time spent in the top 100 Games.
Core Games Made Up 76% of Spend, Echoing the Growing Shift Towards Core Gaming in Western Markets

- Core RPG, Strategy and Action Games combined made up over half of consumer spend in key APAC markets — such as China, Japan and South Korea.
- Core Games engage gamers deeply, leveraging extensive customization, competitive online play, and season pass membership to cultivate stickiness. The #1 Core Game by consumer spend in 2019 was *Fate/Grand Order*, an RPG.
- Only 1% of time spent was in Casino Games, yet they accounted for 6% of total spend. *Coin Master* was the #1 Casino Game in 2019 by consumer spend and was particularly popular in the US, UK and Germany.
Companies Increased Spend on Branding Ad Campaigns in Games

- Games have historically been used for performance advertising, but companies are increasingly running branding campaigns in mobile games.
- In November 2019, for every dollar a brand DSP spent on MoPub’s exchange, about 74 cents went to a gaming publisher — a 19% increase year over year.
- One major factor that makes gaming inventory effective for brands is that it offers engaging formats like full screen video. On MoPub’s exchange, the average rewarded video completion rate in games was 93% in November 2019. MoPub has seen brand spend increase on video by approximately 180% year over year in November 2019.

“Common misconception in mobile in-app gaming is that the audience skews younger, meaning they don’t possess any major buying power. The reality is that people across diverse demographics (both men and women of assorted ages) are playing games on their phones. According to our data, gaming ARPDAU was at least 2.5 times higher than any other vertical in November 2019. This is a signal that the gaming user is becoming more valuable to both advertisers and publishers.”

Nayef Hijazi, Head of Product Marketing, MoPub

Note: Source is MoPub; Brand DSPs as determined by MoPub (aka omni-channel DSPs) run the majority of their campaigns with a focus on meeting branding or brand performance KPIs.
South Korea Saw Highest ARPU Among 2019 Game Releases

- Among the markets analyzed, South Korea led in terms of Average Revenue Per User (ARPU) among newly released games in 2019, followed by Japan and China.
- *Game of Thrones Slots Casino* ranked #1 in Canada for ARPU and was the only Casino Game to claim a #1 rank among the countries analyzed.
- *Perfect World*, an Action RPG Core Game was the #1 game released in 2019 by ARPU among the countries analyzed.
- *Sea Game: Mega Carrier*, a Battle Core Game, saw the highest ARPU among new releases in the United States in 2019.
More Games Than Ever Before Surpassed $5M in Annual Consumer Spend

- Mobile gaming is the leading gaming platform worldwide by consumer spend, and opportunities are continuing to expand in the sector — it is not a market limited to incumbents or the biggest players.
- 17% more games surpassed an annual consumer spend of $5 million USD in 2019 versus 2017.
- The number of games that exceeded $100M annual consumer spend saw an incredible 59% growth in 2019 compared to two years prior.

Note: Consumer spend is in USD. Combined iOS and Google Play.
# Breakout Games of 2019: Downloads

<table>
<thead>
<tr>
<th>rank</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>France</th>
<th>Germany</th>
<th>India</th>
<th>Indonesia</th>
<th>Japan</th>
<th>Russia</th>
<th>South Korea</th>
<th>United Kingdom</th>
<th>United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Run Race 3D</td>
<td>Mario Kart Tour</td>
<td>Killing Virus</td>
<td>Mario Kart Tour</td>
<td>Color Bump 3D</td>
<td>Carrom Pool</td>
<td>Free Fire</td>
<td>Mario Kart Tour</td>
<td>Color Bump 3D</td>
<td>Brawl Stars</td>
<td>Mario Kart Tour</td>
<td>Mario Kart Tour</td>
</tr>
<tr>
<td>2</td>
<td>Call of Duty: Mobile</td>
<td>Call of Duty: Mobile</td>
<td>Drift Race 3D</td>
<td>Call of Duty: Mobile</td>
<td>Mario Kart Tour</td>
<td>Free Fire</td>
<td>Stack Ball</td>
<td>Roller Splat</td>
<td>Brawl Stars</td>
<td>Archero</td>
<td>Color Bump 3D</td>
<td>Color Bump 3D</td>
</tr>
<tr>
<td>3</td>
<td>Color Bump 3D</td>
<td>Color Bump 3D</td>
<td>Knife.io</td>
<td>Run Race 3D</td>
<td>Coin Master</td>
<td>PUBG MOBILE</td>
<td>Fun Race 3D</td>
<td>Call of Duty: Mobile</td>
<td>Run Race 3D</td>
<td>aquapark.io</td>
<td>aquapark.io</td>
<td>Call of Duty: Mobile</td>
</tr>
<tr>
<td>4</td>
<td>Stack Ball</td>
<td>aquapark.io</td>
<td>Crazy Racing KartRider</td>
<td>Fun Race 3D</td>
<td>Run Race 3D</td>
<td>Fun Race 3D</td>
<td>Higgs Domino Island</td>
<td>aquapark.io</td>
<td>Words Of Wonders</td>
<td>Color Bump 3D</td>
<td>Coin Master</td>
<td>aquapark.io</td>
</tr>
<tr>
<td>5</td>
<td>Fun Race 3D</td>
<td>Traffic Run</td>
<td>My Home - Design Dreams</td>
<td>Brawl Stars</td>
<td>aquapark.io</td>
<td>Sand Balls</td>
<td>Tiles Hop: EDM Rush</td>
<td>Color Bump 3D</td>
<td>Fun Race 3D</td>
<td>Crowd City</td>
<td>Traffic Run</td>
<td>Run Race 3D</td>
</tr>
</tbody>
</table>

*Year-over-Year Growth in iOS & Google Play Downloads*
## Breakout Games of 2019: Consumer Spend

<table>
<thead>
<tr>
<th>Year-over-Year Growth in iOS &amp; Google Play Consumer Spend</th>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>France</th>
<th>Germany</th>
<th>India</th>
<th>Indonesia</th>
<th>Japan</th>
<th>Russia</th>
<th>South Korea</th>
<th>United Kingdom</th>
<th>United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Free Fire</td>
<td>Rise of Kingdoms</td>
<td>Game For Peace</td>
<td>Brawl Stars</td>
<td>Coin Master</td>
<td>PUBG MOBILE</td>
<td>Free Fire</td>
<td>Dragon Quest Walk</td>
<td>Game of Sultans</td>
<td>Blade &amp; Soul: Revolution</td>
<td>Coin Master</td>
<td>Coin Master</td>
</tr>
<tr>
<td>2</td>
<td>Brawl Stars</td>
<td>PUBG MOBILE</td>
<td>Perfect World</td>
<td>Clash of Clans</td>
<td>Brawl Stars</td>
<td>Free Fire</td>
<td>PUBG MOBILE</td>
<td>Romancing Saga Reuniverse</td>
<td>Hero Wars</td>
<td>Brawl Stars</td>
<td>ROBLOX</td>
<td>PUBG MOBILE</td>
</tr>
<tr>
<td>3</td>
<td>Ragnarok M: Eternal Love</td>
<td>Homescapes</td>
<td>Arkrights</td>
<td>AFK Arena</td>
<td>AFK Arena</td>
<td>Coin Master</td>
<td>Game of Sultans</td>
<td>Black Desert</td>
<td>Empires &amp; Puzzles</td>
<td>Lineage 2</td>
<td>Star Trek Fleet Command</td>
<td>Matchington Mansion</td>
</tr>
<tr>
<td>5</td>
<td>PUBG MOBILE</td>
<td>Star Trek Fleet Command</td>
<td>Sangokushi Strategy</td>
<td>Saint Seiya: Awakening</td>
<td>Rise of Kingdoms</td>
<td>Last Shelter: Survival</td>
<td>Rise of Kingdoms</td>
<td>Mafia City</td>
<td>PUBG MOBILE</td>
<td>Rise of Kingdoms</td>
<td>Merge Dragons</td>
<td>Game of Thrones: Conquest</td>
</tr>
</tbody>
</table>
Globally, Consumers Are Migrating More of Their Financial Activities to Mobile

- Globally, consumers accessed Finance apps over 1 trillion times in 2019, up 100% from 2017. From stock management to mobile banking to payment apps, this showcases mobile’s central role in managing our daily finances.

- Loyalty and referral programs can help cultivate deeper engagement in finance apps. Citi reported 83% of consumers — and 94% of millennials — are more likely to participate in a loyalty program if it’s on mobile.

- Both Apple and Google have both recognized the power of mobile as our financial hub, with Google offering checking accounts and Apple offering a credit card.

"Grab has become a multi-services platform offering transport, food and payments services with 45% of Grab users using two or more services. We are aiming to serve the region’s rising middle class, which is mobile-savvy and craves digital services. We started offering e-healthcare services in Indonesia in Dec 2019 and are making a deeper push into financial services such as insurance, wealth management and micro-loans to consumers and small and medium-sized businesses. This accelerates financial inclusion, ensuring that everyone benefits from the rise of the digital economy."
User Base Growth of Top Fintech Apps Topped Traditional Banking Apps

- Globally, the average MAU of top 10 Fintech apps grew 20% year over year in 2019, while Banking MAU grew 15%. While Banking apps tend to have higher existing user bases, this illustrates Fintech's disruption — enabled and accelerated by mobile — of traditional banking services.
- The key to mobile is ease, accessibility and simplicity. Features like face or finger recognition streamline the user journey. This underscores why companies can’t port over an existing experience to mobile. Mobile requires deliberate planning to meet consumers’ expectations.
- After all, a good mobile experience can make trading stock or transferring money as fun as leveling up in a game or as engaging as social media.

Growth in Average MAU From 2018 to 2019
Traditional Banking Apps vs. Fintech Apps

Note: Combined iPhone and Android phones: Average of Top 10 Apps by MAU
Globally, Money Is Left on the Table for Wallet Apps by Banks, but This Varies by Market

- Globally, wallet apps by fintech companies engaged users one more time per user each week than wallet apps by traditional banks. This indicates an additional 52 sessions per year for users of wallets apps by fintechs, representing millions of potential transactions each year flowing through fintech companies instead of banks.

- However, in Indonesia, Brazil, France, Germany, Canada, Russia, and the UK, wallet apps by traditional banks saw far greater engagement per user than wallet apps by their fintech counterparts — an important market distinction.

- In China and South Korea, cryptocurrency exchange wallets such as UpBit, Binance, Bithumb helped drive strong engagement.
Fintech Apps Dominated the Breakout Finance Apps of 2019

- Breakout Finance apps saw the greatest year-over-year increase in absolute downloads. While some maintained high levels of downloads from the previous year, many also boasted impressive growth rates year over year.

- **Postbank BestSign** — an additional security app for Postbank — grew 9,300% year over year in downloads in Germany after a December 2018 launch, emphasizing mobile’s ability to provide not only increased access to sensitive information, but additional methods to keep it secure.

- **PC Financial** also saw phenomenal growth in downloads. The app launched in Feb 2019, which is why the growth rate isn’t featured in the chart.

- **Tez** — Google Pay in India — had a breakout year, adding 36 million new downloads — 50% growth year over year.
# Breakout Finance Apps of 2019

## Brazil
1. Nubank
2. FGTS
3. PicPay
4. CAIXA
5. MercadoPago

## Canada
1. PC Financial
2. Scotiabank
3. Credit Karma
4. Borrowell
5. PayPal

## China
1. China Individual Income Tax
2. JD Finance
3. Gome easecard (国美易卡)
4. Huanbei Loan (还呗-还享借)
5. Xiaomi Loan (小米借条)

## France
1. Google Pay
2. S-pushTAN
3. Lydia
4. PayPal
5. NUMBER26

## Germany
1. Postbank BestSign
2. Bankin'
3. S-ID-Check
4. VR-SecureGo
5. comdirect photoTAN App

## India
1. Tez
2. CashBean
3. KreditBee
4. PhonePe
5. Kredit Pintar

## Indonesia
1. PayPay
2. OVO
3. AEON WALLET
4. Rupiah Cepat
5. LINE Pay

## Japan
1. Google Pay
2. d Payment
3. KreditQ
4. Rakuten Pay
5. LINE Pay

## Russia
1. Google Pay
2. Hanorв ФИ
3. i-ONE Bank
4. Sovcombank (Совкомбанк — Халва)
5. Google Pay

## South Korea
1. PayPay
2. PayPay
3. AEON WALLET
4. PayPay
5. KakaoPay

## United Kingdom
1. Monzo
2. Virgin Money Credit Card
3. i-ONE Bank
4. Virgin Money Banking
5. Revolut

## United States
1. Cash App
2. Zeel
3. Venmo
4. Monzo
5. Expertan

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Year-over-Year Growth in iOS & Google Play Downloads
Shoppers Turn to Mobile for Research, Consideration, Purchase and Loyalty

- Increased time spent in Shopping apps is driven by both growing user bases and increased engagement.
- Global Shopping app downloads grew 20% from 2018 to 2019 to over 5.4 billion, an indication of strong demand.
- Time spent in Shopping apps in Indonesia grew 70% from 2018 to 2019 — highest among markets analyzed.
- With more companies adopting mobile platforms and experiences for their users, businesses are enhancing mobile experiences to streamline usability, personalization and services offered.

Growth in Time Spent in Shopping Apps
2018 - 2019

<table>
<thead>
<tr>
<th>Country</th>
<th>Growth (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indonesia</td>
<td>70%</td>
</tr>
<tr>
<td>India</td>
<td>60%</td>
</tr>
<tr>
<td>Brazil</td>
<td>40%</td>
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<tr>
<td>Russia</td>
<td>30%</td>
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<tr>
<td>China</td>
<td>20%</td>
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<tr>
<td>France</td>
<td>10%</td>
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<tr>
<td>United States</td>
<td>5%</td>
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<tr>
<td>Japan</td>
<td>5%</td>
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<tr>
<td>Canada</td>
<td>5%</td>
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<tr>
<td>Germany</td>
<td>3%</td>
</tr>
<tr>
<td>South Korea</td>
<td>2%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1%</td>
</tr>
</tbody>
</table>

Note: Android phones
Time Spent in Shopping Apps Drives Online and In-Store Conversions

- Mobile is a critical avenue for omni-channel growth. It’s not just about converting through the mobile app, it’s about mobile driving research and consideration, and facilitating fulfillment — such as through in-store pickup and tracking of packages.

- The strong correlation (r-value of 0.94) between total retail sales (online and in-store) and time spent in Shopping apps indicates that not only are consumers turning to mobile to shop, but retailers are enhancing mobile experiences to better serve all phases of the buying journey — whether a user is browsing, checking out, facilitating pickup, or tracking their purchase.

Source: US Census and App Annie
Note: Android phones: Average of Top 10 Shopping Apps (Digital-First, Bricks-and-Clicks, Peer-to-Peer Marketplaces) by MAU
Brick-and-Mortar Retailers Made Strong Gains in Mobile Engagement

- Bricks-and-Clicks apps saw strong gains in total sessions year over year, often out-pacing Digital-First apps in their respective markets, a notable change from past years.
- However, among markets analyzed, Digital-First apps still had up to 3.2x more average monthly sessions per user than Bricks-and-Clicks apps in 2019.
- Mobile is central to growing retail businesses in 2020 — for both Brick-and-Mortar and E-Commerce brands. In Q3 2019, Nike’s digital business grew 42% — driven by mobile and app experiences.
- Nike has also focused on innovative app features that enhance the in-store experience, including product reservations and foot scanning technology to give shoppers an accurate shoe size.
More Mobile Shopping Than Ever Before

$38.4B
Spent globally in 24 hours on Alibaba’s Singles Day 2019. Mobile drove the lion’s share

2.5B
Hours Spent globally in the weeks of Black Friday, Cyber Monday and the two weeks after on Android phones, up 40% yoy

$33.1B
Spent on mobile in the US from Nov 1 - Dec 2, 2019; representing 40% of all online sales

Note: Worldwide time spent figure excludes China
## Breakout Retail Apps of 2019

<table>
<thead>
<tr>
<th>Country</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
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</table>

**Year-over-Year Growth in Total Sessions on Android Phones Among Shopping Apps**
Consumers Choose the Small Screen: Mobile Is Our Go-To Device for Entertainment

- Globally, consumers spent 50% more sessions in Entertainment apps in 2019 than in 2017.
- The ever-growing adoption of video streaming apps on mobile devices to watch movies, TV shows, and live events on-demand helped bolster demand for Entertainment apps.
- High quality streaming, growth in user-generated content, and offline mode becoming standardized were industry advancements that helped tip the scales from screen size to on-the-go viewing.
- Competition in the video streaming space will bolster better user experiences to drive growth in downloads, usage and revenue, and ultimately lead to partnerships and consolidation to win the wallets of consumers long term.

Growth in Sessions in Entertainment Apps
2017 - 2019

Note: Android phones
*China’s growth rate is from 2018 to 2019
TikTok and Disney+ Carve Into Crowded US Video Streaming Market

- The entrance of Disney+ into the video streaming space — with Netflix, Amazon Prime Video and HBO NOW as incumbents, AppleTV+ as a new entrant, and HBO Max and NBCUniversal’s Peacock set to launch in 2020 — has dialed up competition.
- Nearly 25% of Netflix’s iPhone users also used Disney+ in Q4 2019, its highest overlap of users among top video streaming apps in the US.
- TikTok saw the greatest 2-year growth in cross-app usage of Netflix at over 135%, indicating that competition in the video streaming space is heating up not only by traditional companies launching standalone streaming services, but from social media companies carving new mobile-first consumption pathways.

Note: Disney+ launched in Nov 2019, data is for Nov - Dec 2019
YouTube Music Used Cross-Promotion to Attract 77M Active Users

- **YouTube Music** saw 980% growth in worldwide active users from Dec 2017 to Dec 2019.
- Cross-promotion across other properties (e.g. **YouTube**) helped grow the user base — along with strategic global expansion.
- YouTube Music focuses heavily on music discovery, including recommendations and playlists based on location, taste, and time of day.
- On Android phones in the US, **YouTube Music** skewed male at 70% of its user base, 1.3x more than **Pandora** and and 1.2x more than **Spotify**.

---

**YouTube Music's Growth in Smartphone User Base**

- Rest of World
- United States
- India
- Brazil
- Mexico
- Thailand
- Indonesia
- Japan
- Ukraine
- Russia

Note: Combined iPhones and Android phones
### Breakout Video Streaming Apps of 2019

<table>
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<td>Netflix</td>
<td>Hulu</td>
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<tr>
<td>2</td>
<td>YouTube Go</td>
<td>Amazon Prime Video</td>
<td>Baidu Haokan</td>
<td>SFR TV</td>
<td>Amazon Prime Video</td>
<td>Hotstar</td>
<td>MX Player</td>
<td>TVer</td>
<td>Twitch</td>
<td>BuzzVideo</td>
<td>Amazon Prime Video</td>
<td>Amazon Prime Video</td>
</tr>
<tr>
<td>3</td>
<td>Amazon Prime Video</td>
<td>MX Player</td>
<td>Zhongzhong Community (种种社区)</td>
<td>Molotov</td>
<td>TV NOW</td>
<td>Netflix</td>
<td>Viu</td>
<td>Netflix</td>
<td>ivi.ru</td>
<td>pooq</td>
<td>BBC News</td>
<td>ESPN</td>
</tr>
<tr>
<td>4</td>
<td>Globo Play</td>
<td>Crave</td>
<td>iQiyi PPS</td>
<td>Amazon Prime Video</td>
<td>waipu.tv</td>
<td>Amazon Prime Video</td>
<td>Netflix</td>
<td>GyaO</td>
<td>MegaFon.TV</td>
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<td>Viki</td>
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<td>Twitch</td>
<td>Joyn i deine Streaming App</td>
<td>JioTV</td>
<td>YouTube Kids</td>
<td>AbemaTV</td>
<td>YouTube Kids</td>
<td>tving</td>
<td>Sky Go</td>
<td>Pluto.tv</td>
</tr>
</tbody>
</table>

Year-over-Year Growth in Time Spent on Android Phones Among Entertainment or Video Players & Editors
50% of Time Spent on Mobile Is in Social and Comms

- Social and Comms was a first-mover industry to mobile. Because of this, it is a relatively mature industry with ingrained app habits.
- Yet, due to innovation in the space and mobile’s increasing importance in our daily lives — as both a source for communication and for entertainment — consumers are still downloading (9.5 billion in 2019 alone) and spending 25% more time in Social and Comms apps worldwide in 2019 versus 2017.
- Socials apps — particularly those popular with Gen Z — are blurring the lines with Entertainment apps. Snapchat prioritized innovating for Gen Z, capitalizing on this generation’s “Fear of Missing Out” (FOMO) with disappearing messages, pioneering the “Stories” feature later adopted by other top social apps, as well as Augmented Reality and branded filters.

![Global Hours Spent on Mobile by Category](chart)

Note: Android phones, Worldwide excluding China
Fragmentation and Specialization in Social Market as Niche Apps Fill a Market Void

- Looking at examples in India and the US, hyper-local Social apps have grown in demand as consumers look for smaller circles to complement social media behemoths like Facebook.
- Nextdoor in the US offers one specific use case of Facebook carved out into a niche app. The app has grown 65% from Dec 2017 to Dec 2019 among smartphone users in the US, an indication of appetite in the market for more specialized and localized social networking.

Note: Combined iPhones and Android phones
TikTok Tidal Wave: Time Spent Exceeded 68B Hours in 2019

- TikTok has grown to become both a social networking app and a source of entertainment, showcasing short, user-generated videos, often featuring lip-syncing or comedy. Musician Lil Nas X’s “Old Town Road” started as a meme on TikTok and went viral on the platform, landing at #1 and breaking Billboard Hot 100 records.

- Global time spent in TikTok grew 210% year over year in 2019, both from expanding user bases and increasing time spent per user. TikTok’s advertising platform positions this engaged and growing audience for brands to reach through videos designed to show value and entertain.

- 8 of every 10 minutes spent in TikTok in 2019 were by users in China, but the app’s usage has also skyrocketed in other markets.
# Breakout Social Apps of 2019

<table>
<thead>
<tr>
<th>Brazil</th>
<th>Canada</th>
<th>China</th>
<th>France</th>
<th>Germany</th>
<th>India</th>
<th>Indonesia</th>
<th>Japan</th>
<th>Russia</th>
<th>South Korea</th>
<th>United Kingdom</th>
<th>United States</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. WhatsApp Business 🇧🇷</td>
<td>TikTok 🇪🇸</td>
<td>Duoshan 🇨🇳</td>
<td>F3 🇲🇾</td>
<td>Opera Browser 🇫🇷</td>
<td>TikTok 🇨🇳</td>
<td>MiChat 🇨🇳</td>
<td>Snapchat 🇺🇸</td>
<td>GetContact 🇺🇸</td>
<td>Snapchat 🇺🇸</td>
<td>YOLO: Q&amp;A 🇺🇸</td>
<td>YOLO: Q&amp;A 🇺🇸</td>
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<tr>
<td>3. Snapchat 🇧🇷</td>
<td>Messenger Kids 🇧🇷</td>
<td>Well 🇨🇳</td>
<td>Plato: Find Fun 🇪🇸</td>
<td>Ecosia Browser 🇦🇷</td>
<td>Hago 🇧🇷</td>
<td>Tantan 🇦🇺</td>
<td>Pinterest 🇦🇺</td>
<td>F3 🇧🇷</td>
<td>Zenly 🇧🇷</td>
<td>Tellonym 🇦🇺</td>
<td>Life360 Family Locator 🇦🇺</td>
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<tr>
<td>4. Telegram 🇧🇷</td>
<td>Hily 🇧🇷</td>
<td>Oasis (绿洲) 🇨🇳</td>
<td>Hily 🇧🇷</td>
<td>Tantan 🇧🇷</td>
<td>VMate 🇧🇷</td>
<td>SHAREit 🇧🇷</td>
<td>InControl: Followers Tracker 🇧🇷</td>
<td>Pinterest 🇧🇷</td>
<td>WAVE - Video Chat Playground 🇧🇷</td>
<td>Hily 🇧🇷</td>
<td>Hily 🇧🇷</td>
</tr>
</tbody>
</table>

*Year-over-Year Growth in iOS & Google Play Downloads*
Ride-Sharing Apps See Strong Growth in Total Rides in 2019

- Ride-sharing apps saw strong growth in sessions in most markets analyzed, with South Korea being the main outlier.
- UK is the most concentrated market among those analyzed. It will be interesting to see if the November 2019 licensing changes in London will impact this in 2020.
- As sessions continue to grow, more mobility options proliferate. Some come from larger players looking to diversity (e.g. JUMP by Uber), while others are focusing solely on a sub category such as scooter-sharing (e.g Bird).

Note: Herfindahl-Hirschman Index – relative concentration of sessions. Each circle represents one market. The closer to 1 on the x-axis, the more concentrated the ride-share category in that market. In the chart above, the UK is the most concentrated market, while Germany is the least. Sessions Growth is on Android phones; Analysis Among top 5 Ride-Sharing apps by average MAU
INDUSTRIES IN MOBILE TRANSFORMATION

Fast Food and Food Delivery Apps Upend Restaurant Industry

● The US restaurant industry is forecast to hit **$1.2 Trillion** in sales by 2030. As of 2019, 60% of sales are off-premise (drive-thru, delivery and carryout), and these are set to drive 80% of the industry’s growth by 2025.

● Much of this demand is funneled through delivery apps. Globally, outside of China, sessions in Food and Drink apps grew 240% from 2017 to 2019 and 105% year over year. In response to this demand for food delivery, delivery-only ‘ghost kitchens’ have emerged — evidence of restructuring in the industry.

● The food delivery market is highly competitive, and companies are innovating to stay ahead. Uber Eats and Postmates both launched group ordering features in 2019.

● GrubHub had a standout year — seeing 55% growth in US downloads year over year.

● Germany’s Delivery Hero expands to APAC with **$4B deal** to buy South Korea’s Woowa, a signal of market consolidation.
INDUSTRIES IN MOBILE TRANSFORMATION

Consumers Spent Over $2.2B in Dating Apps, 2x As Much As in 2017

- **Tinder** dominates for global consumer spend in dating apps. Tinder was the 2nd highest non-gaming app for consumer spend over the last decade, seeing strong success from in-app subscriptions.

- While the most popular dating apps are still growing, companies are also growing by creating a portfolio of apps that cater to a variety of dating interests, as opposed to trying to fit all needs in one app, such as **JSwipe**, **Single Parent Meet**, **Chispa**, and **OurTime**.

Note: Consumer spend is combined iOS and Google Play. Hily launched in 2018; 2018 - 2019 growth rate shown.
Consumers Turned to Mobile to Stream Their Favorite Sports Matches

- Globally, time spent in sports apps has grown 30% from 2017 to 2019.
- However, during the same time period, total megabytes used has grown 80%. This indicates that sports fans are increasingly turning to mobile to stream matches — whether from a connected device casting to a TV or on-the-go from their always-on device: their smartphone.
- In the US, ESPN and MLB.com at Bat were the top two sports streaming apps, respectively, by time spent on Android phones in 2019. In the UK, the top two were BBC Sport and Sky Sports, and in Japan the top two were Sports Navi and DAZN.
- 5G stands to lead to advancements in augmented sports viewing in 2020 and the years to come.
Consumers Spent 130% More Money in Health and Fitness Apps in 2019 vs 2017

- Globally, consumers spent $1.5B in Health and Fitness apps in 2019. Mobile offers new pathways to meal planning, training regimes, exercise tracking and wellness and meditation — carving into the time and money spent at the gym.
- Growth in engagement and spend were strongest in APAC among markets analyzed. Consumers in China spent 330% more in Health and Fitness apps and in South Korea, 570% more time in them from 2017 to 2019.
- **Cashwalk**, a pedometer app, saw incredible growth in time spent in Korea at 175% year over year.

"We’re excited to see continued growth success through improvements to our in-app promotion from free to paid. App Annie has helped us understand the competitive landscape so we can confidently ratchet monetization without sacrificing market position. We’re also excited by our paid acquisition success in international markets and out of home campaigns."

Patrick Wetherille VP Growth, Lose It!

Note: Android phones, Worldwide excluding China
## Worldwide Monthly Active Users in 2019

### Top Apps

<table>
<thead>
<tr>
<th>Rank</th>
<th>App</th>
<th>Developer</th>
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<tbody>
<tr>
<td>1</td>
<td>WhatsApp Messenger</td>
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<td>2</td>
<td>Facebook</td>
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<td>3</td>
<td>Facebook Messenger</td>
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<td>4</td>
<td>WeChat</td>
<td>Tencent</td>
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<tr>
<td>5</td>
<td>Instagram</td>
<td>Facebook</td>
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<tr>
<td>6</td>
<td>TikTok</td>
<td>ByteDance</td>
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<td>7</td>
<td>Alipay</td>
<td>Ant Financial Services Group</td>
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<tr>
<td>8</td>
<td>QQ</td>
<td>Tencent</td>
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<td>9</td>
<td>Taobao</td>
<td>Alibaba Group</td>
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<tr>
<td>10</td>
<td>Baidu</td>
<td>Baidu</td>
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### Top Games

<table>
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<th>Developer</th>
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<td>1</td>
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<tr>
<td>2</td>
<td>Candy Crush Saga</td>
<td>Activision Blizzard</td>
</tr>
<tr>
<td>3</td>
<td>Honour of Kings</td>
<td>Tencent</td>
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<td>4</td>
<td>Anipop</td>
<td>Happy Elements</td>
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<tr>
<td>5</td>
<td>Game For Peace</td>
<td>Tencent</td>
</tr>
<tr>
<td>6</td>
<td>Clash of Clans</td>
<td>Supercell</td>
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<td>7</td>
<td>Pokémon GO</td>
<td>Niantic</td>
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<td>8</td>
<td>Subway Surfers</td>
<td>Kiloo</td>
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<td>9</td>
<td>Clash Royale</td>
<td>Supercell</td>
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<td>10</td>
<td>Free Fire</td>
<td>Sea</td>
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*Combined iPhone and Android Phone monthly active users*
Worldwide Downloads in 2019

### Top Apps

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<tr>
<td>3</td>
<td>Subway Surfers</td>
<td>Kiloo</td>
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<tr>
<td>4</td>
<td>Color Bump 3D</td>
<td>Good Job Games</td>
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<tr>
<td>5</td>
<td>Fun Race 3D</td>
<td>Good Job Games</td>
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<td>6</td>
<td>My Talking Tom 2</td>
<td>Outfit7</td>
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<td>Good Job Games</td>
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<td>10</td>
<td>Stack Ball</td>
<td>Azur Interactive Games</td>
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### Top App Companies

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<th>Country</th>
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<td>Facebook</td>
<td>United States</td>
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<td>Tencent</td>
<td>China</td>
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<tr>
<td>Alibaba Group</td>
<td>China</td>
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<tr>
<td>Microsoft</td>
<td>United States</td>
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<td>YY Inc</td>
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<td>Tencent</td>
<td>China</td>
</tr>
<tr>
<td>Amazon</td>
<td>United States</td>
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<td>InShot Inc</td>
<td>China</td>
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<td>Snap</td>
<td>United States</td>
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### Top Games Companies

<table>
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<th>Company</th>
<th>Country</th>
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<td>Voodoo</td>
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</tr>
<tr>
<td>Good Job Games</td>
<td>Turkey</td>
</tr>
<tr>
<td>SayGames</td>
<td>Belarus</td>
</tr>
<tr>
<td>Outfit7</td>
<td>Cyprus</td>
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<td>Playgendary</td>
<td>Germany</td>
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<tr>
<td>AppLovin</td>
<td>United States</td>
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<tr>
<td>Crazy Labs</td>
<td>Israel</td>
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<td>Miniclip</td>
<td>Switzerland</td>
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<tr>
<td>BabyBus</td>
<td>China</td>
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<tr>
<td>Tencent</td>
<td>China</td>
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</tbody>
</table>
Worldwide Consumer Spend in 2019

Top Apps
1. Tinder (InterActiveCorp (IAC))
2. Netflix
3. Tencent Video
4. iQIYI
5. YouTube
6. Pandora Music
7. LINE
8. LINE Manga
9. Youku
10. Google One

Top Games
1. Fate/Grand Order (Sony)
2. Honour of Kings (Tencent)
3. Candy Crush Saga (Activision Blizzard)
4. Monster Strike (mixi)
5. Pokémon GO (Niantic)
6. Lineage M (NCSoft)
7. Fantasy Westward Journey (NetEase)
8. Clash of Clans (Supercell)
9. PUBG MOBILE (Tencent)
10. Dragon Ball Z Dokkan Battle (BANDAI NAMCO)

Top App Companies
1. InterActiveCorp (IAC) (United States)
2. Tencent (China)
3. Google (United States)
4. Netflix (United States)
5. Baidu (China)
6. LINE (Japan)
7. SIRIUS XM Radio (United States)
8. AT&T (United States)
9. Google One (Google)
10. Badoo (United Kingdom)

Top Games Companies
1. Tencent (China)
2. NetEase (China)
3. Activision Blizzard (United States)
4. Supercell (Finland)
5. BANDAI NAMCO (Japan)
6. Netmarble (South Korea)
7. Playrix (Ireland)
8. Sony (Japan)
9. Playtika (Israel)
10. Zynga (United States)
Discover New Mobile Trends and Insights for 2020

2020 State of Mobile:
- 2019 Country-Level Ranking Tables: Top Apps and Companies by Downloads, Active Users and Consumer Spend
- 2020 State of Mobile Report Summary
- 5 Things You Need to Know for a Successful 2020 on Mobile
- A Look Back At the Top Apps & Games of the Decade

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