

App Annie

INDEX

JAPAN OVERTAKES USA

The East Asian dragon now number one
in Google Play revenues

About the App Annie Index™

Who is App Annie?

App Annie is the industry leader in app store analytics and market intelligence for the global app economy. More than 80 percent of the Top 100 iOS publishers by worldwide revenues use its services, and more than 150,000 apps rely daily on App Annie Analytics to track their downloads, revenues, rankings and reviews. The company is tracking more downloads and revenues than any other app store market data company - to date, over 11 billion downloads and more than US\$ 1.5 billion in app store publisher revenues. App Annie is a privately held global company with offices in Beijing, Paris, San Francisco, and Hong Kong.

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What is the App Annie Index™?

The App Annie Index™ is a monthly report that ranks the app stores by monthly downloads and revenues - segmented by stores, countries, publishers and apps. This is based off market estimates from App Annie Intelligence data.

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Why the App Annie Index™?

Our objective is to better inform business decisions in the app world, driving forward the global app economy through data. While the daily app store rankings are a great way to organize content for consumers, we provide a monthly report that is useful for companies commercially invested in app stores, whether they be publishers, stores, ad networks, investors or media companies.

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About App Annie Intelligence

App Annie Intelligence is built from an advanced statistical model that App Annie's data science team has developed. This model combines billions of anonymized datapoints that we have tracked in downloads, revenues and rankings to generate the most accurate and comprehensive app market estimates in the industry.

App Annie is tracking more downloads and revenues than any other app store market data company - to date, we have tracked more than 11 billion downloads and more than US\$1.5 billion in revenue. This forms the foundation of the statistical model that we use to build App Annie Intelligence estimates, making it the most accurate market data available for app stores.

November 2012 Report : Highlights



Japan ousts US for top spot in Google Play monthly revenues

Japan overtakes the US in Google Play monthly revenue, marking the first time that the US is not the number one country for monthly revenues on Google Play.

iOS monthly revenues 4x those of Google Play, but Google Play growing?

The gap between monthly global revenues on iOS and Google Play is significant, but it's gradually closing. Although iOS monthly revenues are four times larger than its counterpart, Google Play October revenues are 17.9% greater than those of September while iOS October revenues are 0.7% lower than its September revenues.

East Asian publishers beginning to dominate

The app publishing business is by its very nature a global business, but there has long been an East-West divide. Well, that barrier is coming down. Indeed in recent months, we're starting to see more East Asian publishers invest in global content with significant commercial success. For October 2012, seven of the Top 10 publishers on Google Play by monthly revenue, are Japanese or Korean.

Game publishers monetize best on app stores

Game publishers from West and East are leading the way in monetization across the app stores. In October 2012, nine of the top 10 publishers by monthly revenue on both iOS and Google Play are game publishers.

The few outperform the many

If you're on the lookout for the next Rovio, then the present month may be a good time to read this report. App publishers such as Supercell, NextFloor and Applibot are monetizing their users at an astounding rate on the back of a couple of apps. And no wonder you'll find their apps at the top of the 'App monthly Revenue Top 10' charts.

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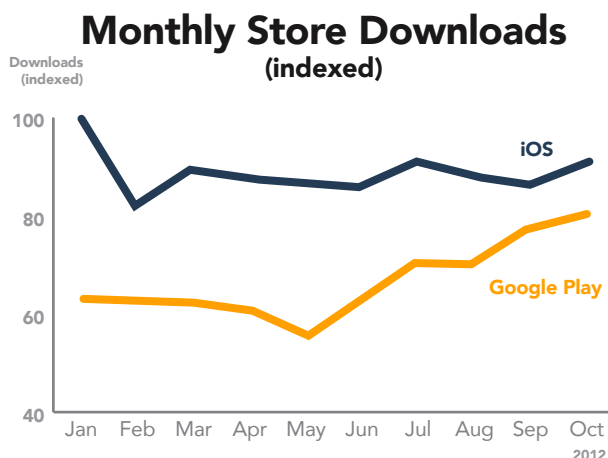
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Store Index

Google Play is closing the gap on iOS, but can it catch up?

DOWNLOADS: Google Play's October downloads are 48% higher than in May 2012, fuelling its catch-up

Much has been reported about Android's sheer growth in smartphone distribution over the last year. However, the volume of global free downloads in October is still 10% greater on iOS than on Google Play. What is noteworthy though is the speed of Google Play's catch-up. Comparing October 2012 to May 2012, Google Play monthly downloads have increased by 48%, while iOS downloads have increased by 3.3%. Although, in the most recent month, growth has slowed considerably, and the question remains, can Google Play keep growing at a lightning pace?



Still a way to go, but Google Play closing the gap with iOS

For month of October 2012, iOS global revenues are four times larger than those on Google Play

REVENUES: iOS's October revenue is 4x that of Google Play's

It's a similar story in the revenue game, with the gap even larger. In October 2012 iOS global revenues are four times larger than those on Google Play. But this does not tell the whole story. Google Play October 2012 monthly revenues are 311% greater than its January revenues. In contrast, iOS October 2012 monthly revenues are 12.9% greater than those from January 2012. Furthermore, Google Play October 2012 revenues are 17.9% greater than those of September 2012 while iOS October 2012 revenues are 0.7% lower than its September 2012 revenues.



iOS monthly revenues maintain a healthy lead in the face of Google Play monthly revenue growth

Store Index

The Store Index monitors global free downloads and grossing monthly revenues across the two most commercially significant global mobile stores, iOS and Google Play. An index value of 100 corresponds to January 2012 iOS revenues or downloads so you can track changes in each store.

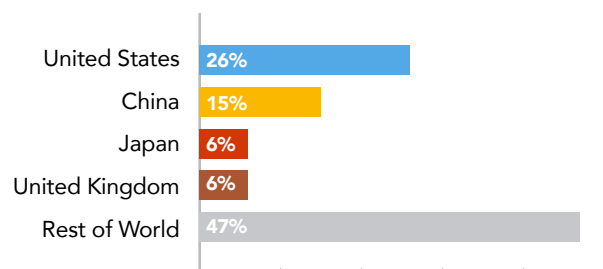
Country Index

The US's app store dominance is being challenged by the dragons of East Asia

DOWNLOADS: China is challenging the US's superpower status on iOS, while South Korea and India are becoming major forces in Google Play

In January 2012, the US accounted for 30% of all global monthly iOS free downloads. Ten months later in October 2012 the US now accounts for just 25.8% of global monthly downloads, with China just behind, accounting for 15.3% of global monthly downloads.

Monthly Downloads by Country iOS October 2012

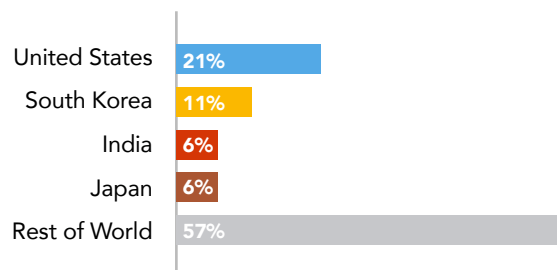


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SOURCE: App Annie Index™ November 2012

In Google Play, it's a very different set of countries that are vying for the world's downloads. We first reported about the growth of Google Play in South Korea a month ago. The country that gave us the Samsung Galaxy series now stands as the nation driving the most free downloads in October 2012 behind the US, eclipsing download volumes in Japan by nearly two times. India is also starting to show its distribution muscle, coming in at third place ahead of Japan, accounting for 6.2% of global monthly free downloads in October 2012. The flood of low-cost Android phones into the Indian market is really starting to turn this BRIC nation into a download superpower - monetizing those downloads however, is still a challenge that has yet to be solved.

Monthly Downloads by Country Google Play October 2012



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SOURCE: App Annie Index™ November 2012

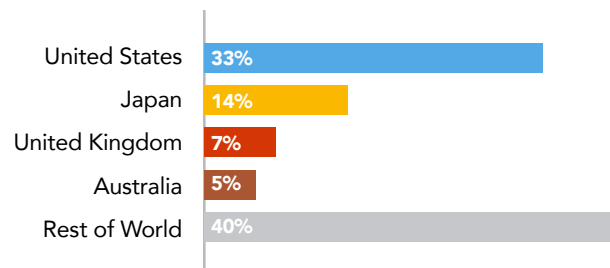
What these trends do demonstrate is a shift in the balance of power towards East Asia on the global app stage

REVENUES: In October 2012, Japan Overtakes US for Google Play monthly revenue, catching up with iOS

In October 2012 Japan has leapfrogged the US in Google Play monthly revenues. This is the first time that the US is not number one by monthly revenues for Google Play. Japan has seen rapid revenue growth in the last few months and it demonstrates the monetization advantage that publishers enjoy in Japan, especially when you consider that its monthly download volume is a little over a quarter that of the US. On iOS, Japan is still second behind the US, but continuing to grow faster than its Western counterpart. What these trends do demon-

strate is a shift in the balance of power towards East Asia on the global app stage - they represent countries that have a sizeable mobile population combined with the propensity to download and /or spend.

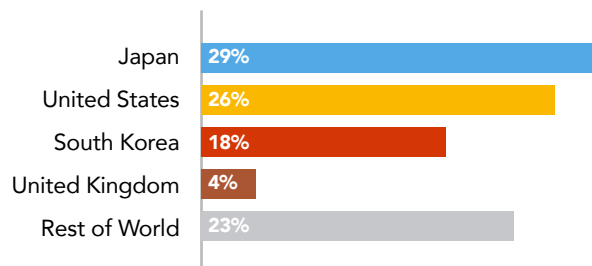
Monthly Revenues by Country iOS October 2012



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SOURCE: App Annie Index™ November 2012

Monthly Revenues by Country Google Play October 2012



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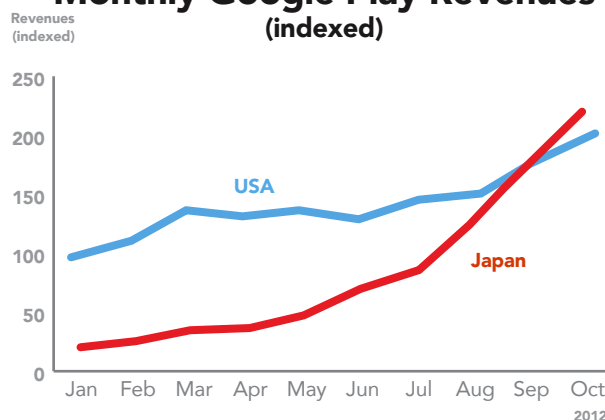
SOURCE: App Annie Index™ November 2012

To explain the how and the why of Japan's Google Play miracle, we've dug a little deeper. We've put together a chart indexing US against Japan monthly 2012 revenues. While US monthly revenues have grown at a gradual pace, Japanese monthly revenues have skyrocketed so that October 2012 is more than 10X January monthly revenues this year.

Country Index

This index monitors the share of monthly global free downloads and revenues by country as a percentage of global total. We track 155 countries for iOS and 35 countries for Google Play. Rest of the World includes all remaining countries outside of the Top Four. Please note that Google Play does not support paid apps and in-app purchases in China, and has limited distribution in that country since it is not the default store for any major handset or carrier in China.

Monthly Google Play Revenues (indexed)



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Set January 2012 USA = 100

SOURCE: App Annie Index™ November 2012

Japan monthly revenues on Google Play have exploded 10X since January 2012

Monthly Downloads by Country iOS October 2012

Country	Global Share	vs prev month
United States	25.8%	▼ 0.4%
China	15.3%	▲ 0.5%
Japan	5.9%	▲ 0.6%
United Kingdom	5.6%	▲ 0.2%
Rest of World	47.4%	▼ 0.9%

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iOS Free Downloads by Country as % Share of Global
SOURCE: App Annie Index™ November 2012

Monthly Downloads by Country Google Play October 2012

Country	Global Share	vs prev month
United States	20.6%	▲ 0.6%
South Korea	10.6%	▼ 2.0%
India	6.2%	▲ 0.2%
Japan	5.7%	▼ 0.8%
Rest of World	56.8%	▲ 2.0%

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Google Play Free Downloads by Country as % Share of Global
SOURCE: App Annie Index™ November 2012

Monthly Revenues by Country iOS October 2012

Country	Global Share	vs prev month
United States	32.7%	▼ 0.8%
Japan	14.4%	▲ 1.5%
United Kingdom	7.3%	▼ 0.1%
Australia	5.2%	▼ 0.1%
Rest of World	40.3%	▼ 0.5%

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iOS Revenues by Country as % Share of Global
SOURCE: App Annie Index™ November 2012

Monthly Revenues by Country Google Play October 2012

Country	Global Share	vs prev month
Japan	28.9%	▲ 2.3%
United States	26.0%	▼ 1.4%
South Korea	18.1%	▼ 0.3%
United Kingdom	4.2%	▼ 0.1%
Rest of World	22.8%	▼ 0.4%

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Google Play Revenues by Country as % Share of Global
SOURCE: App Annie Index™ November 2012

Publisher Index

American, Japanese, and Korean game publishers dominate the download charts in October 2012

MONTHLY DOWNLOAD TOP 10 in OCTOBER 2012: Gameloft and Rovio back in the iOS top 10, Halfbrick Studios rises up the Google Play charts

In October 2012, the worldwide download top 10 publisher charts are dominated by a few interesting headlines and insights:

1. The biggest gainers in October are game and entertainment publishers

In October 2012, Gameloft and Rovio have made significant leaps in iOS, jumping into the top 10. While in Google Play, Halfbrick Studios, the maker of 'Fruit Ninja', has jumped in the rankings to become the sixth most downloaded publisher in October.



2. Game publishers dominate on iOS, social networks on Google

In October 2012, half of the top 10 monthly download iOS publishers are in the gaming space, compared to only two of the top 10 Google Play publishers. Electronic Arts, Gameloft, and Storm8, are all game publishers that appear in the iOS but not Google Play top 10. Conversely, makers of social networking apps dominate the Google Play top 10 including the likes of Google, Facebook, Whatsapp, Microsoft (Skype) and Twitter.

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...it's a sign of how app stores have really globalized the content publishing industry.

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Top Publishers by Monthly Free Downloads iOS October 2012

	Publisher	Rank Change	Category	HQ Country	# of Apps
1	Apple	-	Various	United States	19
2	Google	-	Various	United States	26
3	Electronic Arts	-	Games	United States	962
4	Gameloft	▲ 8	Games	France	259
5	Facebook	▲ 3	Various	United States	5
6	Tencent	▲ 4	Various	China	76
7	Outfit7	-	Games	Cyprus	58
8	Storm8	-	Games	United States	28
9	Disney	▼ 5	Various	United States	183
10	Rovio	▲ 3	Games	Finland	23



SOURCE: App Annie Index™ November 2012

Game publishers have a stronghold in the iOS top 10 monthly free downloads in October 2012

Top Publishers by Monthly Free Downloads

Google Play October 2012

	Publisher	Rank Change	Category	HQ Country	# of Apps
1	Google	-	Various	United States	59
2	Facebook	-	Various	United States	3
3	Rovio	▲ 1	Games	Finland	11
4	Go Launcher	▼ 1	Tools	China	250
5	Outfit7	▲ 1	Entertainment	Cyprus	26
6	Halfbrick Studios	▲ 17	Games	Australia	7
7	Adobe	-	Photography	United States	19
8	WhatsApp	▼ 3	Communication	United States	2
9	Microsoft (Skype)	▲ 2	Various	United States	3
10	Twitter	▲ 3	Social	United States	3

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SOURCE: App Annie Index™ November 2012

Variety reigns in the Google Play charts, with only two game publishers in the top 10 monthly free downloads

3. App publishing is a global business

If you thought that all the most successful app publishers were based out of Silicon Valley, think again. In October 2012, four of the top 10 publishers by monthly free downloads are based outside the US both for iOS and Google Play. Publishers such as Go Launcher from China who develop utility apps are driving more free monthly downloads than more large US internet giants, and it's a sign of how app stores have really globalized the content publishing industry.

MONTHLY REVENUE TOP 10: US, Japanese and Korean game publishers dominating the October revenue charts

We talked about a balance of power shift towards East Asia on a country level - well, it's becoming just as apparent at a publisher level too. East Asian publishers are both capitalizing on their own audiences and launching successful IP amongst Western audiences too (take for example Rage of Bahamut by DeNA, which reached the top of the US monthly grossing charts in June 2012).

1. US, Japanese and Korean companies raking in all the cash

In October 2012, Japanese and US publishers account for eight of the top 10 monthly grossing on iOS, with Supercell and Gameloft being the only exceptions.

In October 2012 on Google Play, a staggering eight of the top 10 monthly grossing companies are from Japan or Korea. The top three are all Japanese publishers including DeNA (who climbed 107 places to head the list on the back of its number one hit Rage of Bahamut), COLOPL and GungHo Online. Korean publishers WeMade Entertainment and GAMEVIL are fourth and sixth, respectively.

2. The few versus the many: Supercell is closing in on EA with only two apps

It's no surprise that companies like Electronic Arts, Zynga, Gameloft, DeNA and GREE top the October 2012 revenue charts on iOS and Google Play. These are large companies whose sheer international distribution is enough to dwarf any independent publisher many times over - EA publishes 962 apps directly and through its subsidiaries on iOS, Gameloft 259 apps.

Top Publishers by Monthly Revenues iOS October 2012

	Publisher	Rank Change	Category	HQ Country	# of Apps
1	Electronic Arts	-	Games	United States	962
2	Supercell	-	Games	Finland	2
3	Zynga	▲ 2	Games	United States	52
4	Gameloft	▼ 1	Games	France	259
5	Apple	▼ 1	Various	United States	19
6	Applibot	▲ 4	Games	Japan	4
7	SQUARE ENIX	▲ 6	Games	Japan	142
8	GungHo Online	▲ 7	Games	Japan	13
9	Kabam	▼ 3	Games	United States	5
10	GREE	▼ 3	Games	Japan	110

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SOURCE: App Annie Index™ November 2012

East meets West while small and big publishers sit next to each other in this top 10 monthly revenues

Top Publishers by Monthly Revenues Google Play October 2012

	Publisher	Rank Change	Category	HQ Country	# of Apps
1	DeNA	▲ 107	Games	Japan	168
2	COLOPL	-	Games	Japan	37
3	GungHo Online	▲ 18	Games	Japan	12
4	WeMade Entertainment	▲ 12	Games	South Korea	7
5	Zynga	▲ 1	Games	United States	18
6	GAMEVIL	▼ 3	Games	South Korea	77
7	GREE	▲ 3	Games	Japan	96
8	NAVER	▲ 4	Various	Japan	46
9	Gameloft	▼ 4	Games	France	61
10	NextFloor	▲ 265	Games	South Korea	1

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SOURCE: App Annie Index™ November 2012

East Asian publishers generate the most monthly revenue on Google Play

What is even more interesting though, is how the app stores have also allowed smaller, independent publishers to make as much money if not more, through a distribution pipeline that includes just a handful of apps. On iOS, Supercell is the most

impressive, second only to EA on the back of two apps. Applibot and Kabam also make it into the October 2012 top 10 with just a few apps each. On Google Play, the Korean game publisher Next-Floor makes more money than many of the large

Electronic Arts (Publisher in Apple App Store) 351 apps

	BOGGLE FREE Details • Daily Ranks • Rank History		Road Trippin' Details • Daily Ranks • Rank History
	Road Trippin' Details • Daily Ranks • Rank History		Max and the Magic Marker Details • Daily Ranks • Rank History
	Fight Night Champion by EA Sports™ Details • Daily Ranks • Rank History		Max and the Magic Marker for iPad Details • Daily Ranks • Rank History
	Fight Night Champion by EA Sports™ Details • Daily Ranks • Rank History		Ultimate Mortal Kombat™ 3 for iPad Details • Daily Ranks • Rank History
	NBA JAM by EA SPORTS™ Details • Daily Ranks • Rank History		Dead Space™ for iPad Details • Daily Ranks • Rank History
	BATTLEFIELD: BAD COMPANY™ 2 Details • Daily Ranks • Rank History		Ultimate Mortal Kombat™ 3 Details • Daily Ranks • Rank History
	Pogo Games (World) Details • Daily Ranks • Rank History		Pogo Games Details • Daily Ranks • Rank History
	Ultimate Mortal Kombat™ 3 (World) Details • Daily Ranks • Rank History		Need for Speed™ Hot Pursuit for iPad Details • Daily Ranks • Rank History
	EA Sports 総合格闘技 Details • Daily Ranks • Rank History		Need for Speed™ Hot Pursuit Details • Daily Ranks • Rank History

Supercell (Publisher in Apple App Store) 2 apps

	Hay Day Details • Daily Ranks • Rank History		Clash of Clans Details • Daily Ranks • Rank History
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Supercell competing with EA on revenue with only two apps
SOURCE: App Annie Store Stats

multinationals. This is on the back of a single app, DragonFlight for Kakao.

3. Zynga the only US company on both the iOS and Google Play October 2012 top 10 monthly grossing charts

Zynga has received more than its fair share of press lately, but Zynga's fortunes on mobile appear to be relatively bright. They are the only US company to appear in the October top 10 monthly revenue for both iOS and Google Play, moving up a couple of spots on the charts. Zynga has reorganized its workforce around mobile with notable releases of new apps across its 'With Friends' series and other franchises, and it appears to be paying off.

4. Surprise, surprise. Game publishers are the most effective monetizers

It'll be no surprise to industry insiders that nine of the top 10 publishers by monthly revenues on iOS and Google Play are game publishers. In fact, the only exceptions to that rule are Apple on iOS and NAVER on Google Play (Korean maker of popular social networking app LINE).

Supercell is closing in on EA with only two apps

Publisher Index

These tables chart the top ten publishers worldwide, ranked by the free downloads or revenues that they generate across all their apps for the month of October 2012, as estimated by App Annie Intelligence. We have grouped together parent publishers (i.e. Instagram's downloads would be included under Facebook) to give a more accurate business view. The 'Rank Move' refers to the movement within this ranking compared to the previous month. And we define 'category' as the category that the publisher publishes under (for publishers whose apps are in many categories, we've defined this as 'Various').

New To The Top 100: International publishers continue to lead growth

In October 2012, on Google Play, the gaming publishers on this list are experiencing breakout growth. We have companies like NextFloor, the Korean game publisher with the breakout hit 'DragonFlight for Kakao' and Nordeus, the European sports gaming startup, as well as the Chinese game studio Feelingtouch. The growth of NextFloor, Nordeus and PlusMX has been particularly meteoric - two months ago, they weren't even inside the monthly top 1000. This also demonstrates the opportunities for startups in Google Play.

On iOS, we see a similar theme: it's mostly gaming publishers that have started to make significant monthly revenue gains. We find Kiloo, the Danish creator of 'Subway Surfers' alongside Chinese publisher Magic Universe. DreamDevLasers is the lone non-gaming company, as the success of their 'Video Downloader Pro' app is the main reason for their appearance on this list. In contrast to the sudden risers on the Google Play table, all of the iOS publishers here have been riding a slower, linear path to the monthly top 100. Three of these apps have been steadily moving up within the monthly top 1000 ranks since January 2012, of this year, giving some insight into the difference in ranking volatility between the stores.

New to the Monthly Top 100 October 2012 Monthly Revenue Rankings

iOS	Google Play
Buffalo Studios	Applibot
DreamDevLasers	BitRhymes
Kiloo	Feelingtouch
Magic Universe	highbrow
Telltale	inXile entertainment
	NextFloor
	Nordeus
	PlusMX
	Silent Ocean
	TomTom International
	Top Free Games
	Ubisoft

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SOURCE: App Annie Index™ November 2012

On Google Play, it's mostly gaming publishers that are experiencing breakout growth.

New To The Monthly Top 100

This tracks publishers that have for the first time reached the monthly top 100 publisher charts by monthly global revenue according to monthly App Annie Intelligence estimates. If they have ever appeared in the monthly top 100 before this current month, they cannot be listed in this tracker. Therefore its objective is to showcase newly successful, breakout start-ups as well as larger publishers who have recently broken into a new store.

App Index

Asian game publishers dominate on Google Play,
Western game publishers on iOS

GAMES: Asian gamers make their presence known

1. Strategy and Casino games on iOS, Brain and Casual on Google Play

Strategy games such as Clash of Clans and Kingdoms of Camelot, as well as casino games such as Zynga Poker and Slotomania are among the best monetizing games on iOS. While on Google Play, it's the wave of Asian brain and casual games that are driving revenues.

amongst Japanese and Korean audiences) are shooting up the rankings, hundreds of places each month. Whereas the iOS charts are much more stable, with apps moving up and down several places on a monthly basis.

3. The Kakao factor in Google Play

There are four apps in the October top 10 monthly grossing that are built for Kakao, the popular Korean social networking service. And while games in the West predominantly integrate with Facebook to provide them with a social graph,

Top Game Apps by Monthly Revenues iOS October 2012

	Game	Publisher	Rank Change	Subcategory
1	Clash of Clans	Supercell	-	Strategy
2	The Simpsons™: Tapped Out	Electronic Arts	-	Adventure
3	Puzzle & Dragons	GungHo Online	▲ 2	Puzzle
4	Hay Day	Supercell	▲ 4	Family
5	Kingdoms of Camelot: Battle for the North	Kabam	▼ 2	Strategy
6	拡散性ミリオンアーサー	SQUARE ENIX	▲ 9	Card
7	Slotomania	Playtika	-	Casino
8	CSR Racing	NaturalMotion	▲ 1	Racing
9	Poker by Zynga	Zynga	▼ 3	Casino
10	DragonVale	Backflip Studio	▼ 6	Role Playing



SOURCE: App Annie Index™ November 2012

Strategy and Casino games stand out on the iOS monthly revenue top charts

2. Google Play rank movement much more volatile than iOS

So when we analyze the movement of apps up and down our monthly revenue charts, what's clear is the volatility within Google Play. Since the store is growing quickly in particular regions, it means certain apps (particularly those that monetize

Kakao is providing a very effective and monetizable social graph in Korea. DragonFlight for Kakao, the one-hit phenomenon from NextFloor, is the highest ranked among these and has risen 308 places from the previous month into fourth place. What is impressive about these apps is that although they monetize predominantly from

Top Game Apps by Monthly Revenues

Google Play October 2012

	Game	Publisher	Rank Change	Subcategory
1	Puzzle & Dragons	GungHo Online	▲ 38	Brain
2	GREE	GREE	▲ 1	Casual
3	DragonFlight for Kakao	NextFloor	▲ 308	Arcade & Action
4	애니팡 for Kakao	SUNDAYTOZ	▼ 3	Brain
5	秘宝探偵 [登録不要の無料本格RPG]	COLOPL	▲ 1	Casual
6	Rage of Bahamut	DeNA	▲ 1	Arcade
7	아이러브커피 for Kakao	PATISTUDIO	▼ 5	Casual
8	暴走列伝 単車の虎	Donuts Co	▼ 3	Casual
9	캔디팡 for Kakao	WeMade Entertainment	▲ 202	Brain
10	Rule the Sky	JCE	▼ 6	Casual

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SOURCE: App Annie Index™ November 2012

Four Kakao-based games led monthly revenues for all Google Play games in October 2012

Korean audiences, they're up in the global top ten. This says something about the revenue scale of top-ranked apps amongst East Asian audiences.

4. Google Play dominated by Asian game publishers, iOS dominated by Western game publishers

The regional skew between Google Play and iOS is marked and noticeable. In October, eight of the top 10 monthly grossing apps on iOS are from US or European based publishers. Most of the top 10 apps on Google Play are Korean or Japanese. The ability of these East Asian game publishers to monetize their own local audiences provides lessons for the publishing world.

NON-GAMES: Asian gamers make their presence known

1. Google Play users like to customize their devices, iOS users like to socialize through apps

There's an interesting contrast between the top non-game apps by monthly revenue for iOS and Google Play. On iOS, users are willing to spend money on social networking apps like LINE,

Whatsapp, Zoosk and Badoo as well as productivity apps including iWork and Quickoffice software. On Google Play, productivity apps tools such as Smart Tools and Norton Security are monetizing well.

2. Productivity apps monetizing well

As users start to think of their mobile and tablet devices more and more as tools for work and not just play, seven of the 20 apps across the iOS and Google Play in October top 10 monthly grossing apps are work-related apps, including iWork, Quickoffice and OfficeSuite. Apple's Pages app stays on top of the iOS October top 10 for the second month running.

3. LINE, the social networking app phenomenon that's monetizing

LINE, because of its monetization value across both iOS and Google Play where it's ranked 2nd and 1st respectively in monthly grossing non-games. The app has spread from Japan across Latin America and South East Asia, and as opposed to Whatsapp which monetizes exclusively through the price of the download on iOS, LINE is a free app, monetizes solely through in-app purchases for Emoji virtual items.

Top Non-Game Apps by Monthly Revenues iOS October 2012

	App	Publisher	Rank Change	Category
1	Pages	Apple	-	Productivity
2	LINE	NAVER	▲ 1	Social Networking
3	Whatsapp Messenger	Whatsapp	▲ 1	Social Networking
4	Comics	comiXology	▼ 2	Books
5	Pandora Radio	Pandora Media	▼ 4	Music
6	Badoo	Badoo Software	▼ 1	Social Networking
7	Zoosk	Zoosk	-	Social Networking
8	Keynote	Apple	▼ 2	Productivity
9	Numbers	Apple	▼ 1	Productivity
10	Quickoffice Pro	Quickoffice	▼ 1	Business

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SOURCE: App Annie Index™ November 2012

Social Networking apps around the world are proving they can monetize

Top Non-Game Apps by Monthly Revenues Google Play October 2012

	App	Publisher	Rank Change	Category
1	LINE	NAVER	-	Communication
2	SwiftKey 3 Keyboard	SwiftKey	▼ 1	Productivity
3	Comics	comiXology	-	Comics
4	OfficeSuite Pro 6+	Mobile Systems	▲ 5	Business
5	Poweramp Full Version Unlocker	Max MP	-	Music and Audio
6	NAVIGON Europe	Garmin	▲ 1	Travel and Local
7	DocumentsToGo Full	DataViz	▼ 3	Business
8	ウイルスバスター™ モバイル for Android™	トレンドマイクロ株式会社	▲ 2	Tools
9	Norton Security & AntiVirus	NortonMobile	▼ 1	Tools
10	Smart Tools	Smart Tools	▲ 39	Tools

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SOURCE: App Annie Index™ November 2012

Device utilities lead the way for monetizing on Google Play

App Index

This monitors the top apps by monthly revenue as estimated by monthly App Annie Intelligence data. We have separated game and non-game apps in order to understand the dynamics within both subsets.

Methodology

Where does the data come from?

The App Annie Index™ leverages App Annie's most advanced market data product App Annie Intelligence. App Annie Intelligence calculates accurate market estimates around the downloads and revenues of the entire app store ecosystem, broken down by store, country, publisher and app. The monthly ranks of the App Annie Index™ are based on these granular market estimates, allowing us to provide the app industry with a common methodology from which to see who are the top apps, publishers, countries and stores.

Interpreting the App Annie Index™

To help you read this report, we've provided a short explanation about the data in each index and our methodology.

Store Index

The Store Index monitors global free downloads and grossing monthly revenues across the two most commercially significant global mobile stores, iOS and Google Play. An index value of 100 corresponds to January 2012 iOS revenues or downloads so you can track changes in each store.

Country Index

This index monitors the share of monthly global free downloads and revenues by country as a percentage of global total. We track 155 countries for iOS and 35 countries for Google Play. Rest of the World includes all remaining countries outside of the Top Four. Please note that Google Play does not support paid apps and in-app purchases in China, and has limited distribution in that country since it is not the default store for any major handset or carrier in China.

Publisher Index

These tables chart the top ten publishers worldwide, ranked by the free downloads or revenues that they generate across all their apps for the month of October 2012, as estimated by App Annie Intelligence. We have grouped together parent publishers (i.e. Instagram's downloads would be included under Facebook) to give a more accurate business view. The 'Rank Move' refers to the movement within this ranking compared to the previous month. And we define 'category' as the category that the publisher publishes under (for publishers

whose apps are in many categories, we've defined this as 'Various').

New To The Top 100

This tracks publishers that have for the first time reached the monthly top 100 publisher charts by monthly global revenue according to monthly App Annie Intelligence estimates. If they have ever appeared in the monthly top 100 before this current month, they cannot be listed in this tracker. Therefore its objective is to showcase newly successful, breakout startups as well as larger publishers who have recently broken into a new store.

App Index

This monitors the top apps by monthly revenue as estimated by monthly App Annie Intelligence data. We have separated game and non-game apps in order to understand the dynamics within both subsets.

Downloads

Downloads on app stores can be divided into free and paid downloads. For the purposes of this report, we have focused on free downloads as a measure of download volume. The revenues generated from the sale of paid apps is included in the 'grossing revenues', but we have chosen not to include an analysis of paid download volumes within this report in order not to mix free and paid apps that operate under different business models.

Revenues

By revenues, we refer to what stores define as 'grossing revenues'. This includes all the revenues generated by the app through the store, including revenue both from the price to download an app, as well as any in-app purchases (including subscriptions). It should be noted that the revenues we track are the effective revenues that are generated from the point of view of the publisher and therefore the store's 30% revenue cut is subtracted.

Categories and sub-categories

When tracking categories or sub-categories, we are directly using the categories as defined by the store, which are different between iOS and Google Play.

Countries

As with categories, we also use the countries as defined by the store, and analyze our data according to those country demarcations. On iOS we are tracking 155 countries and on Google Play 35 countries or regional stores.

Find Out More

For those that are hungry for app store market data and insights, App Annie offers a wealth of free and premium resources.:

App Annie Intelligence

Start informing your business decisions with the most advanced market data available for app stores. Learn more at:

<http://www.appannie.com/intelligence/>

App Annie Store Stats

Access the most complete app rankings database in the industry. For free!

<http://www.appannie.com/top/>

App Annie Index

Be the first to spot app store market trends with the monthly report that ranks the world's largest stores, countries, publishers and apps.

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We often work with the press, providing market data for interesting stories and feature articles.

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