

# App Annie 2019 State of Mobile

## Report Methodology

- The publisher and app rankings reported in the App Annie 2019 State of Mobile are based on the download, consumer spend and usage estimates available through App Annie Intelligence.
  - App Annie 2019 State of Mobile consumer spend rankings are based on consumer spend that the iOS App Store and Google Play earned from paid downloads and in-app purchases. They do not include consumer spend earned from in-app advertising.
- Top companies in Games are ranked by downloads and consumer spend in the Games category only, while top publishers in Apps are ranked by downloads and consumer spend in categories outside of Games.
- In the iOS App Store, an app can be categorized under a Primary Category as well as an optional Secondary Category. If an app has a Primary Category of Games and a Secondary Category of Entertainment, it is a candidate to be included only in the Games tables of the App Annie 2019 State of Mobile. If the app's Primary Category is Entertainment and its Secondary Category is Games, it is a candidate to be included only in the Apps tables within this report.
- Download rankings are based on individually downloaded apps and exclude app downloads when included in bundles. Consumer spend rankings are based on consumer spend from individually downloaded paid apps as well as in-app purchase consumer spend from both individually downloaded apps and app bundles.
- Consumer spend is gross spend — the sum of payments made before Apple or Google takes a fee. iOS App Store and Google Play share of consumer spend on apps varies, but is generally 30%.
- For publishers acquired by another company during 2018, downloads and consumer spend are attributed to the new parent company from the start of the calendar month after the acquisition occurred.
- Occasionally, a publisher may decide to shift an existing app from one category to another category. In these cases, the App Annie 2019 State of Mobile ranks that app based on its app store categorization at the time of writing.
- Monthly Active Users (MAU), download and consumer spend rankings in this report are based on unified apps made possible by App Annie's exclusive DNA. In unified apps, similar versions of the same app with different names and on different platforms are unified. For example, *Fruit Ninja* and *Fruit Ninja Free* on iOS, and *Fruit Ninja* and *Fruit Ninja Free* for Android on Google Play are all aggregated and ranked as a single *Fruit Ninja* unified app.
  - Company and app rankings are based on the current and historical App Annie DNA relationships as of the time of writing. App Annie DNA relationships are subject to change over time.

- In the event that a unified app in the top downloads and consumer spend app rankings is connected to multiple companies, we selected one company to be represented in the ranking. For top company rankings, each app directly connected to a company contributed to that company's rank. For instance, Tencent's version of *Candy Crush Saga* contributed to Tencent's ranking.
- Top apps and games usage rankings exclude pre-installed apps as well as apps published by platform owners and downloaded to devices running their OS (such as *Google Translate* on Android phone and *GarageBand* on iPhone). However, downloads from apps published by platform owners are included in the calculations of company rankings.
- In the App Annie 2019 State of Mobile rankings, all apps and publishers are reported under their parent companies, where available; for example, the *Minecraft - Pocket Edition* app is reported under its parent publisher Microsoft, rather than its direct publisher Mojang. Note that if you view the Microsoft parent publisher page on App Annie Intelligence Free, you will see the publishers that roll under the parent publisher Microsoft, including Mojang. The *Minecraft - Pocket Edition* app will be listed under the Mojang publisher page.
- Note that the ranking approach used in the App Annie 2019 State of Mobile differs from that used in the iOS App Store. In the latter, app rankings for a given category will include all apps whose Primary Category or Secondary Category matches that given category. Therefore, an app can appear in the rankings for more than one category within the iOS App Store.
- In Google Play, an app can be categorized under only one category, so there is no double-categorization.
- App Annie Intelligence is currently available for the iOS App Store, Google Play and third-party Android app stores in China. It does not currently provide estimates for other app stores, such as the Amazon Appstore.
- App Annie Usage Intelligence data for iPhone and Android phone were derived from mobile usage data collected from a large sample of real-world users, combined with additional proprietary data sets.
- Smartphones are defined as mobile devices with screen sizes below seven inches. Tablets are defined as mobile devices with screen sizes seven inches and above.
- For the purposes of this report, an active user is defined as a device having one or more sessions with an app in the time period. A single person may be active on multiple devices in any time period, and, therefore be counted as one user per device in the total active users.
- A session as defined in this report is the period for which a user has a given app open in the foreground with the screen on. Background data usage does not contribute to session length.
- Push notifications are not considered active use and, as a result, do not count towards estimates of users, sessions, or session time.
- For Android total time spent calculations, some apps (such as system apps and others which do not appear on Google Play) may not be included.

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## Category and Top App Definitions

- Video streaming apps were identified by App Annie from the Entertainment, News, Photo & Video and Sports categories on the iOS App Store, and the Entertainment, Video Editors & Players, News & Magazines, and Sports categories on Google Play. Video streaming apps were defined as those that include at least some long-form video in the form of TV series, movies, news programs and full sports events (including eSports) where the content provider retains ownership and control of the content. Apps exclusively showing short-form video, music videos, user-generated content and highlights and clips were excluded.
- Retail apps were identified by App Annie from the Lifestyle, Food & Drink and Shopping categories on the iOS App Store, and the Shopping, Food & Drink and Lifestyle categories on Google Play. Our analysis is limited to apps published by retailers, as well as apps that facilitate B2C transactions for goods. The analysis excludes apps that primarily drive C2C transactions, third parties providing vouchers and coupons, and apps not related to selling goods despite being from retailers.
- Bricks & Clicks retailers sell goods in brick-and-mortar stores and online channels. Digital-First businesses exclusively sell goods through e-commerce and m-commerce. Mobile-first companies are Digital-First businesses that are predominantly focused on m-commerce.
- Retail banking and fintech apps were identified from the Finance categories in iOS and Google Play. Retail banking apps were identified as coming from organizations that are designated as commercial banks that are the primary provider of banking services. This includes apps from banks with no physical branches, or apps that only offer a single service type. It does not include apps that consolidates banking services offered by other companies. Fintech banking services were identified as coming from organizations that are not classified as banks, but offer at least one specialist retail banking service to consumers.
- Social apps were identified from the Social Networking, Lifestyle, Business, News and Photo and Video categories on iOS and the Social, Communication, Lifestyle, News & Magazines and Business categories on Google Play. Our analysis is limited to apps whose primary purpose is communication, whether one-to-one or one-to-many.
- Travel apps were identified from the Travel and Navigation categories on iOS and the Travel & Local and Maps & Navigation categories on Google Play.
- Food Delivery and QSR apps were identified from the Food and Drink category on iOS and Google Play.