

# Insights Into App Engagement

Q1 2015

*App Annie*

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# 1. Introduction

The mobile app economy continues to grow at a phenomenal pace. In 2014, revenue from app stores and in-app advertising were both around [70% higher than the previous year](#). For app publishers looking to make the most of the opportunities available in the app economy, understanding the way the users interact with apps on their devices is a key component of forming an effective app strategy.

App Annie is excited to offer insight into the way these apps are being used with our first spotlight on app usage. In this report, we dive into five key app markets around the world -- the United States, United Kingdom, Germany, Japan and South Korea -- to compare and contrast how apps are shaping the way people use their mobile devices. We focus on the categories and individual apps that dominated the use of iOS and Android mobile devices in Q1 2015.

App usage data, provided through *App Annie Usage Intelligence*, is sourced from the industry's largest iOS and Android datasets, providing unprecedented insights into app usage across millions of users in 60 countries. When combined with App Annie's industry-standard *Store Intelligence* and *Audience Intelligence*, it provides a 360-degree view of the mobile app economy.

For deeper insight into the use of apps around the globe, including additional markets, device breakdowns and usage metrics, request a [demo](#) of the *App Annie Intelligence* suite today.

## 2. Communication Forms the Core of Smartphone App Usage

Smartphones, as the name suggests, are primarily communication devices. Messaging apps remain the hot topic in the mobile world, and their position as the center of mobile life is highlighted by recent developments such as *Facebook Messenger's* transition to a [full messaging platform](#).



**Top App Categories\* by Sessions Per Active User  
Android Smartphones, Q1 2015\*\***

Rank	United States	United Kingdom	Germany	Japan	South Korea
1	Social	Communication	Communication	Communication	Communication
2	Communication	Social	News & Magazines	Productivity	Social
3	News & Magazines	News & Magazines	Productivity	Personalization	Personalization
4	Tools	Productivity	Social	Tools	Books & Reference
5	Personalization	Tools	Tools	Social	Games

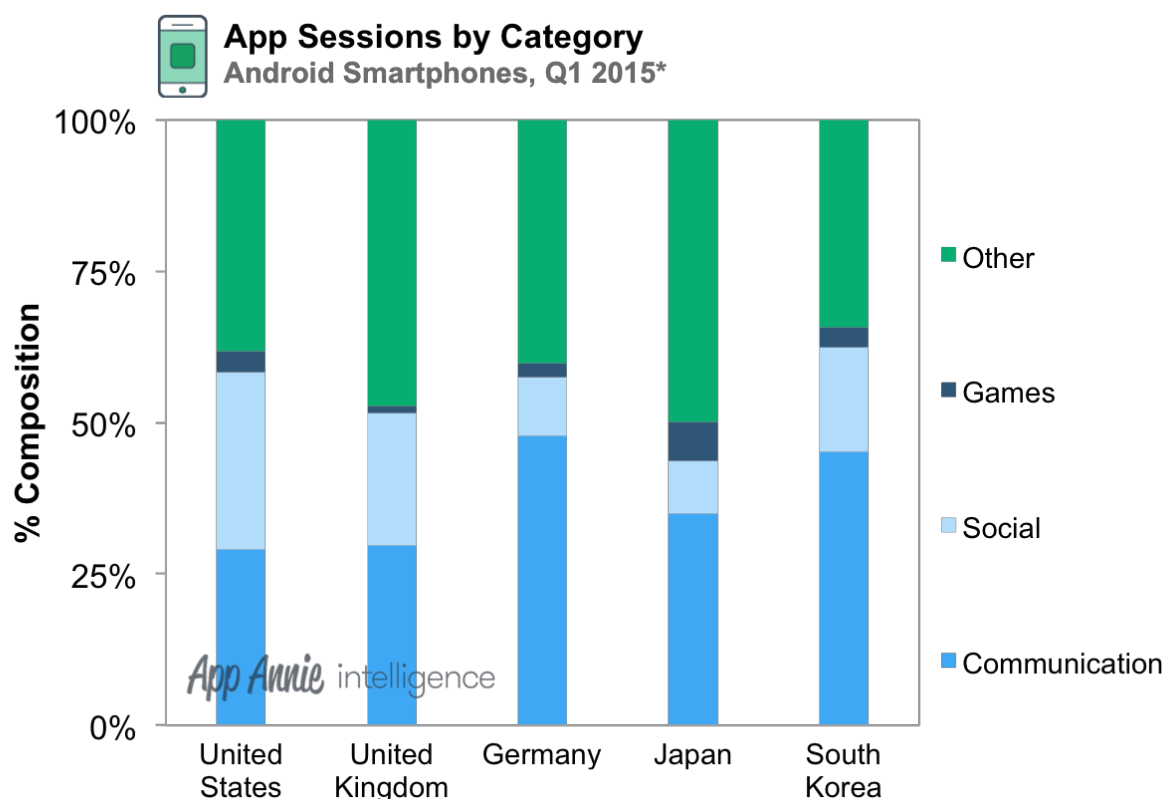
*App Annie* intelligence

\* App categories were determined by publisher-selected categories on Google Play

\*\* Q1 2015 data calculated as a straight average of January, February, and March 2015 sessions per active user.

The Communication and Social categories played a key role in app engagement across all five major markets. In South Korea, the Communication and Social categories accounted for around 60% of all Android smartphone app sessions in Q1 2015, while Germany and the United States were not far behind this level.





\* Q1 2015 data calculated as a straight average of January, February, and March 2015 % compositions.

Similarly, time spent in apps by Android smartphone users was also dominated by the Social and Communication categories. In the United States and Germany, these two categories combined accounted for approximately 60% of time spent in apps on Android smartphones. In South Korea and Japan, the proportion of time spent in Social and Communication apps is slightly lower, but still accounted for 45% of total time spent in apps on Android smartphones in Q1 2015.



## Top App Categories\* by Time Spent Per Active User Android Smartphones, Q1 2015\*\*

Rank	United States	United Kingdom	Germany	Japan	South Korea
1	Social	Social	Communication	Communication	Communication
2	Communication	Communication	Social	Games	Games
3	Media & Video	Media & Video	Media & Video	Social	Social
4	Games	News & Magazines	Games	Media & Video	Media & Video
5	Entertainment	Games	News & Magazines	News & Magazines	Books & Reference

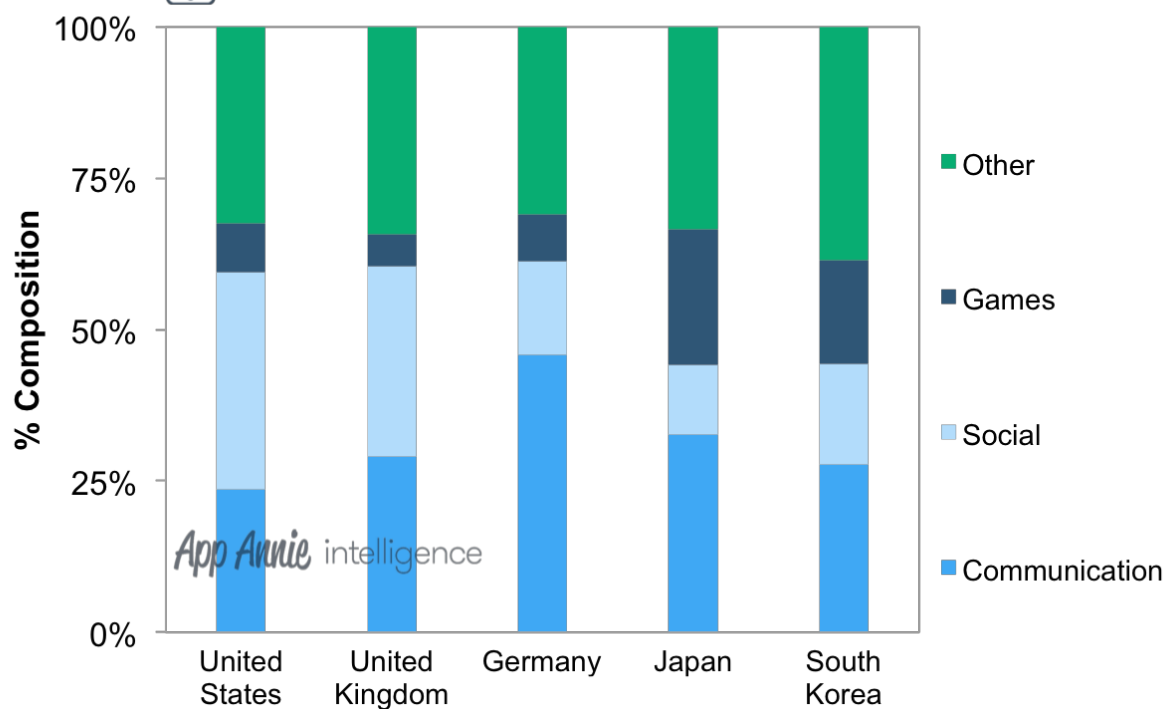
*App Annie* intelligence

\* App categories were determined by publisher-selected categories on Google Play

\*\* Q1 2015 data calculated as a straight average of January, February, and March 2015 time spent per active user.



## Time Spent in Apps by Category Android Smartphones, Q1 2015\*




\* Q1 2015 data calculated as a straight average of January, February, and March 2015 % composition.

As publishers select the categories in which their apps are listed, there can be considerable overlap in functionality between the Social and Communication categories, especially among the top apps where social networks and messaging apps dominate. However, the top apps across these categories reveal some small but key differences in app use between different countries.



### Top Apps by Sessions Per Active User Combined Social and Communication Categories, Android Smartphones, Q1 2015\*

Rank	United States	United Kingdom	Germany	Japan	South Korea
1	 Facebook	 WhatsApp Messenger	 WhatsApp Messenger	 LINE	 KakaoTalk
2	 Chrome Browser	 Facebook	 Facebook	 Chrome Browser	 CashSlide
3	 Snapchat	 Chrome Browser	 Chrome Browser	 Twitter	 Facebook

*App Annie* intelligence

\* Q1 2015 data calculated as a straight average of January, February, and March 2015 sessions per active user.

All markets saw strong influence from large social networks such as *Facebook* and *Twitter*, messaging apps such as *WhatsApp Messenger*, *LINE* and *KakaoTalk*, and web browsers such as *Chrome Browser* and *Daum*. However, it is notable that the United States saw *Facebook* dominate Android smartphone sessions, whereas the other markets all saw more sessions from messaging apps. Likewise, by time spent in apps, the social networks *Facebook* and *Instagram* led in the United States whereas messaging apps were more prominent in other markets.



## Top Apps by Time Spent Per Active User Combined Social and Communication Categories, Android Smartphones, Q1 2015\*

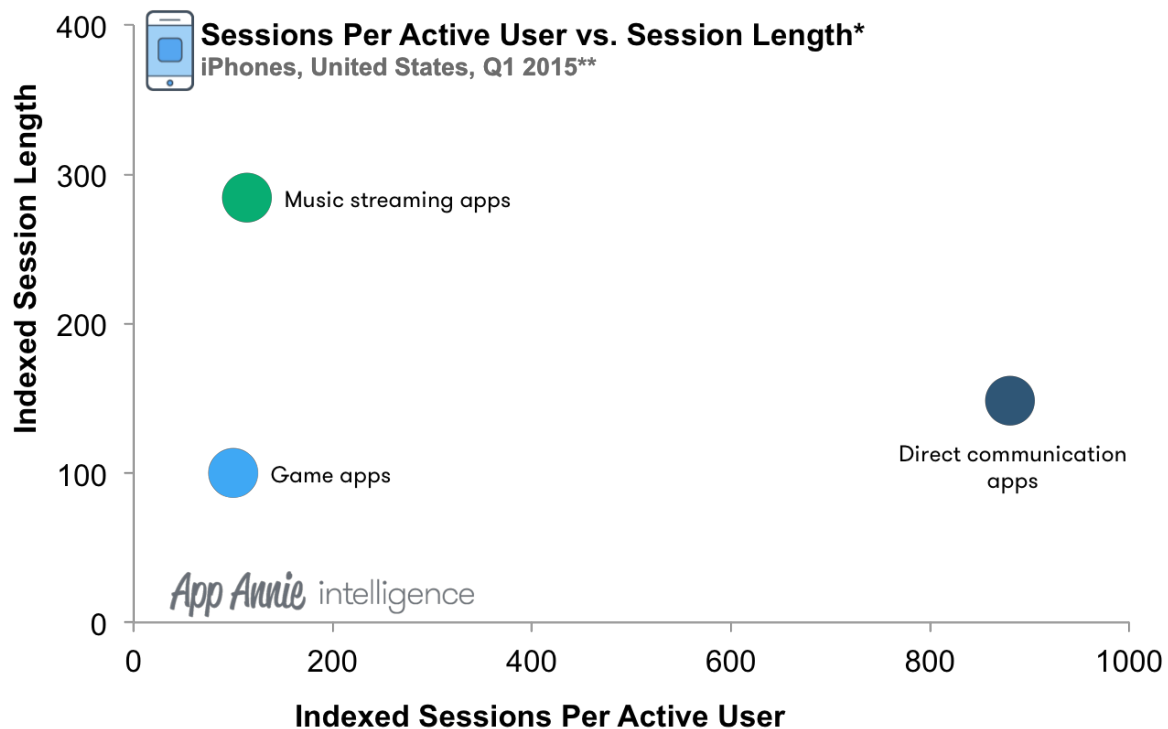
Rank	United States	United Kingdom	Germany	Japan	South Korea
1	Facebook	Facebook	WhatsApp Messenger	LINE	KakaoTalk
2	Chrome Browser	WhatsApp Messenger	Facebook	Chrome Browser	Facebook
3	Instagram	Chrome Browser	Chrome Browser	Twitter	Daum

App Annie intelligence

\* Q1 2015 data calculated as a straight average of January, February, and March 2015 time spent per active user.

It appears that US Android smartphone users lean more towards one-to-many communication through social networks, whereas app usage in other markets (particularly Germany, Japan and South Korea) is weighted slightly more towards direct one-to-one (or one-to-few) communication.

The prominence of apps for direct person-to-person communication is also reflected in the top iPhone apps by active users (Appendix A). Messaging apps took the top spot among iOS users in South Korea (*KakaoTalk*), Japan (*LINE*) and Germany (*WhatsApp Messenger*). That is not to say that messaging apps were not popular in the United States. However, it is interesting to note that US Android smartphone users appear to have a preference for the image-focused messaging of *Snapchat*.



\* Categories were defined by App Annie, and do not necessarily reflect iOS App Store categories. Pre-installed Apple apps were not included. Games were defined by their iOS App Store primary category. Communication apps were considered those whose primary purpose is one-to-one communication, including text, voice, image and video communication. Music streaming apps were considered as those offering on-demand or radio streaming of audio, and have a primary category of Music on the iOS App Store. This chart shows the average of the top 5 apps in each category; the top 5 apps were selected based on a straight average of January, February, and March 2015 MAUs.

\*\* Q1 2015 data calculated as straight averages of January, February, and March 2015 sessions per active user and session lengths.

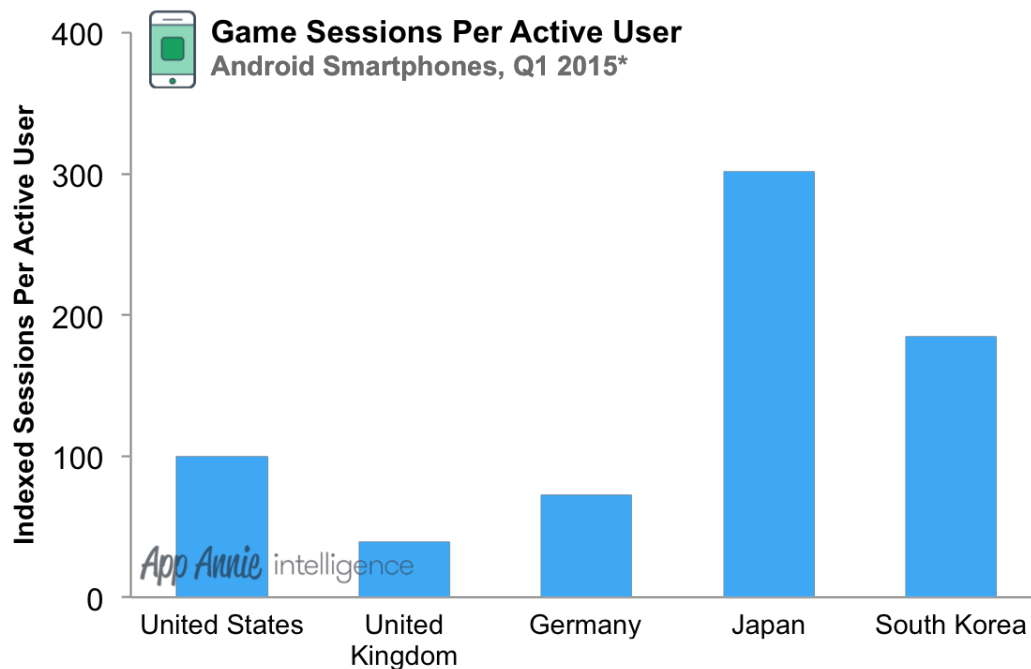
On iPhones in the United States, direct communication apps (messaging and calls) also featured among the most heavily used apps. The top five person-to-person communication apps by average monthly active US iPhone users in Q1 2015 saw over 7x as many average monthly sessions per active user as the leading game apps and the leading music streaming apps. However, session length tended to be shorter for communication apps than music streaming apps, as music streaming app sessions often run in the background while consumer engagement apps for communication tends to be more active.

It will be interesting to see how app usage changes as messaging apps continue to add [more services](#) and [communication media](#), further blurring the lines between social networks and messaging.

### 3. Asia Dominates Mobile Gaming

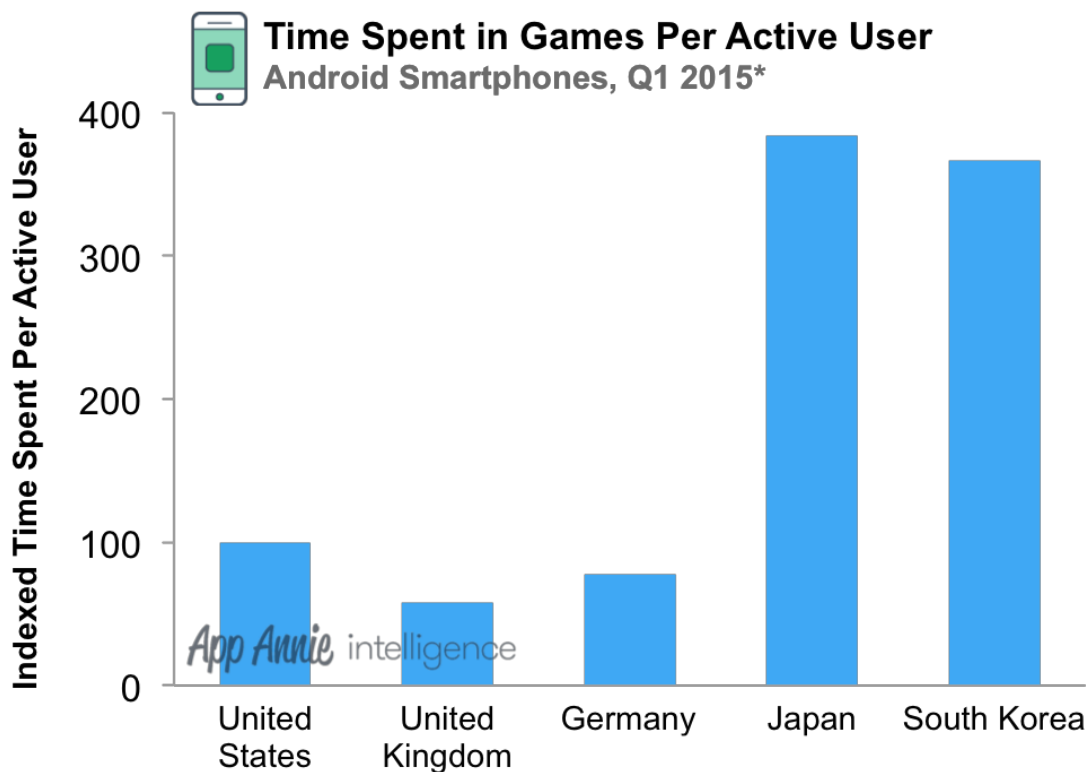
Beyond the ubiquity of messaging, social networking and other apps for communication, there were some significant differences in app usage habits among the five markets in this study. One of the key differences between markets in Asia and those in Europe and the United States was the extent of game usage on mobile devices.

#### Japan Saw 4x More Game Time Per User Than the US



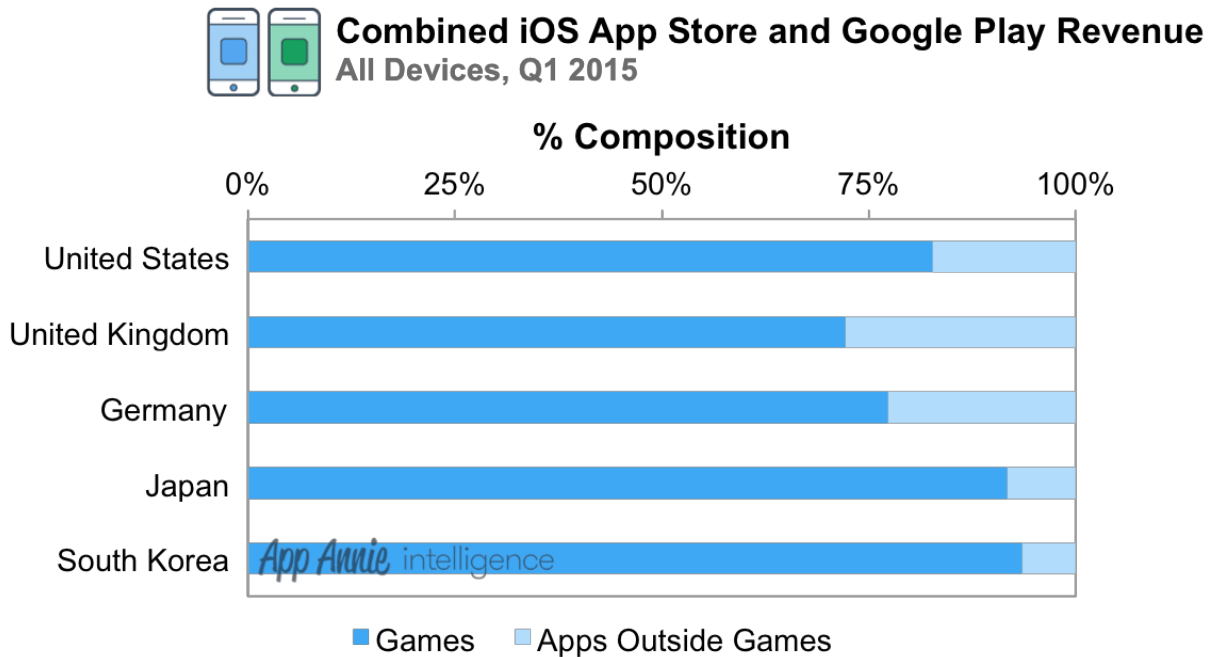
\* Q1 2015 data calculated as a straight average of January, February, and March 2015 sessions per active user.

On average, Android smartphone users in Japan activated around 3x more gaming sessions per month than their counterparts in the United States, and around 7.5x more than those in the United Kingdom. This significant difference between Western and Asian markets is also reflected in the amount of time that users spent in games. Games ranked as the second highest category by time spent per Android smartphone users in Japan and South Korea in Q1 2015, behind only the Communication category. In Japan, Android smartphone users spent around 4x as much time per month as users in the United States playing mobile games in Q1 2015. In contrast, Android smartphone users in Europe and the United States tended to spend more time in apps from the Social and Media & Video categories than in games.



\* Q1 2015 data calculated as a straight average of January, February, and March 2015 time spent in games per active user.

All app usage metrics point to a clear conclusion -- mobile gaming in Asian markets is huge. Although games provide the majority of app store revenue in all markets, the extent of the dominance reflected time spent in games per user. In Japan and South Korea, over 90% of iOS and Google Play app store revenue comes from games, whereas games accounted for approximately 70% of app store revenue in the United Kingdom and around 80% in the United States in Q1 2015.

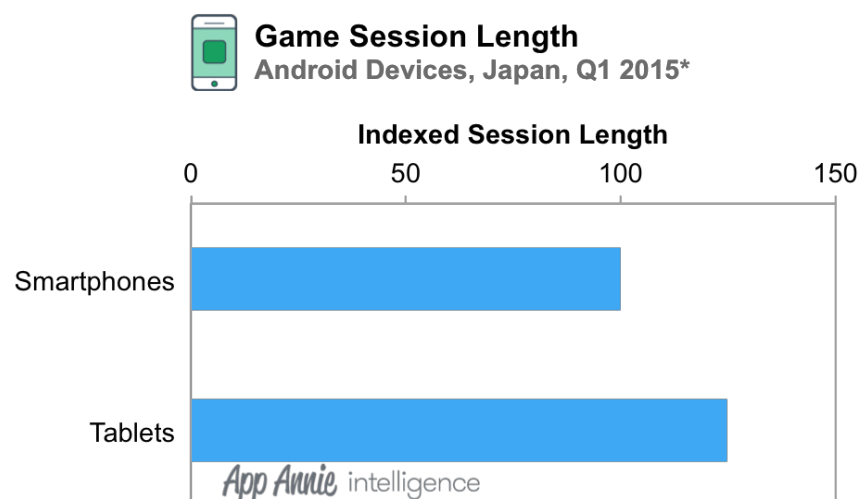


It is interesting to note that while there were over 50% more game sessions per active Android user in Japan than South Korea, there was little difference in the time spent in games per user per month. The top 10 games by active users on both iOS and Android (Appendix B) indicate that the market in South Korea may lean slightly more towards mid-core gaming than that in Japan, with titles such as *Seven Knights* and *Hero for Kakao* featuring in the top 10 by MAUs. While more casual games such as *Candy Crush Saga*, *LINE Disney Tsum Tsum* and *Anipang 2* also see high usage in Japan and Korea, they dominate the top 10 to a lesser extent than similar titles in Europe and the United States.



## Tablets Inspire 25% Longer Game Sessions in Japan

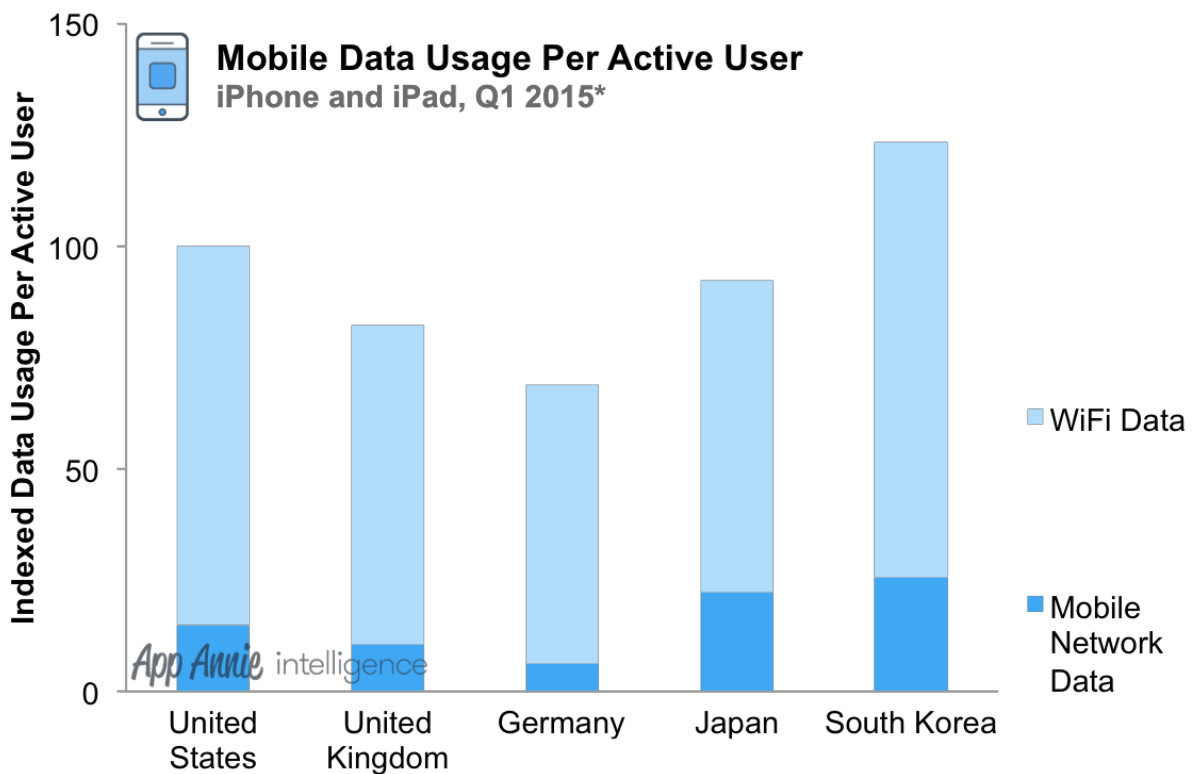
The majority of mobile gaming in Japan occurred on smartphones. Average monthly game time spent per active Android user was more than twice as high on smartphones than on tablets; game session lengths, however, were 25% longer on tablets. This indicates that game publishers are likely to see fewer sessions from tablet users, but those who successfully attract tablet users may be rewarded with higher levels of engagement.



\* Q1 2015 data calculated as a straight average of January, February, and March 2015 game session lengths.

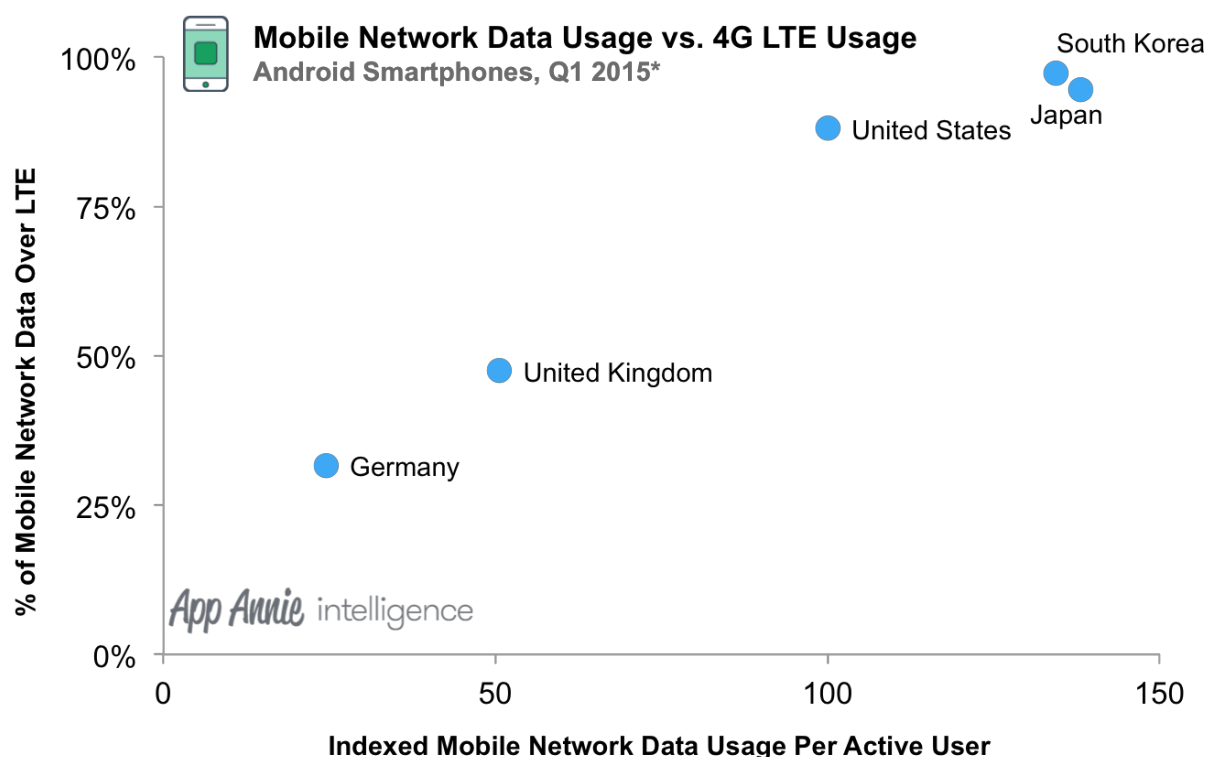
## 4. South Korea Leads Mobile Data Use

With its extensively developed telecommunications infrastructure combined with high app engagement, it is little surprise that South Korea led data consumption per active user on mobile devices. Although communication services and games led app engagement in South Korea, the highest data usage during Q1 2015 came from Media & Video apps, with *YouTube* leading the way as it did across all five markets in this study. However, given the [recent emphasis on Facebook video plays](#) on mobile devices, it was interesting to note that *Facebook* was the 2nd highest consumer of data on Android smartphones in the United States, United Kingdom and Germany in Q1 2015, and ranked 3rd in South Korea.



\* Q1 2015 data calculated as a straight average of January, February, and March 2015 data usage per active user.

It is interesting to note that mobile data usage per active user showed a strong correlation with the proportion of mobile data transferred over 4G LTE networks. Mobile data use per user on Android smartphones in South Korea and Japan, where LTE data is approaching 100% of mobile data, is around 35% higher than in the United States. Conversely, Germany's LTE use lags behind and saw, on average, 75% less mobile data use per active Android smartphone user than the United States. Offline capabilities or minimizing mobile data use may, therefore, be an important consideration for publishers targeting markets where 4G infrastructure is less well-developed.



\* Q1 2015 data calculated as straight averages of January, February, and March 2015 mobile network data usage per active user and % of mobile network data over LTE.

## 5. Summary

- Apps for communication and social networking remain at the forefront of iOS and Android mobile device usage across the United States, United Kingdom, Germany, Japan and South Korea. On Android smartphones, the Communication and Social categories generally accounted for the majority of time spent in apps in Q1 2015.
- Use of apps from the Communication and Social categories was particularly strong in the United States and Europe, comprising around 60% of time spent in apps on Android smartphones.

- The five markets we studied showed subtle but important variations in preferred apps for communication and social interaction. Messaging apps were particularly strong in Japan, South Korea and Germany. The United States, and to a lesser extent the United Kingdom, showed a slight lean towards broader one-to-many communication through social networks such as *Facebook* and *Instagram*.
- Users in Asia and Western markets showed significant differences in their engagement with mobile games in Q1 2015. Android smartphone users in Japan spent, on average, around 4x as much time in games per month than their United States counterparts. The United Kingdom trailed the other four markets in this study for game time spent per active user on Android smartphones.
- While smartphones accounted for the majority of game time spent in Japan, session lengths on tablets were approximately 25% longer for Android.
- With its extensive 4G LTE infrastructure, it was little surprise to see South Korea and Japan lead mobile and overall data usage in Q1 2015. *YouTube* generally led data usage in the five major markets we studied, with *Facebook* coming in just behind in the United States, United Kingdom and Germany.

## About App Annie

App Annie is the largest mobile app intelligence platform, providing developers and publishers with a full 360-degree view of what they need to know to build, market and invest in their apps, including data about their own apps as well as a granular understanding of their competition and relevant industries. Today, more than 90 percent of the top 100 publishers and over 400,000 mobile app professionals at 100,000 companies rely on App Annie, including Electronic Arts, Google, LinkedIn, Line, Microsoft, Nexon, Nestle, Samsung, Tencent, Bandai Namco, Universal Studios and Dow Jones. App Annie is a privately held global company headquartered in San Francisco. For more information, please visit: [www.appannie.com](http://www.appannie.com) or follow App Annie on Twitter: @appannie.

Report methodology and updates are available [here](#).

## Appendix A: App Usage Top Charts



# Top Apps\* Outside Games by Active Users iPhone, Q1 2015\*\*

United  
States

United  
Kingdom

Germany

Japan

South  
Korea

China

1



Facebook



Facebook



WhatsApp  
Messenger



LINE



KakaoTalk



WeChat

2



Skype for iPhone



Facebook  
Messenger



Facebook



Google Maps



네이버 - NAVER



QQ

3



Facebook  
Messenger



WhatsApp  
Messenger



YouTube



Facebook



Facebook



Taobao for  
iPhone

4



YouTube



YouTube



Facebook  
Messenger



YouTube



KakaoStory



Alipay

5



Instagram



Instagram



Google Maps



Twitter



YouTube



Weibo

6



Pandora Radio



Snapchat



eBay



Facebook  
Messenger



네이버 지도 - Naver  
Map



Baidu

7



Snapchat



Twitter



Amazon



Google



Facebook  
Messenger



Baidu Map

8



Google



Google Maps



Google



Gmail



BAND



QQ Music

9



Netflix



eBay



DB Navigator



SmartNews



멜론(MelOn)



Meituan

10



Twitter



BBC News



Shazam



Amazon



Instagram



Youku



# Top Apps\* Outside Games by Active Users iPad, Q1 2015\*\*

United States

United Kingdom

Japan

China

1



Skype for iPad



Facebook



YouTube



WeChat

2



Facebook



YouTube



Google Maps



QQ HD 2015

3



YouTube



Facebook Messenger



Facebook



Taobao for iPad

4



Facebook Messenger



Google Map



Gmail



Youku HD

5



Netflix



BBC iPlayer



Google



iQIYI HD

6



Pandora Radio



eBay for iPad



LINE for iPad



Baidu Map HD

7



Instagram



BBC News



Chrome



Alipay

8



Tango



Chrome



SmartNews



Baidu HD

9



Pinterest



Google



Yahoo! JAPAN



Weibo HD

10



Chrome



Twitter



LINE



Jingdong HD



# Top Apps Outside Games by Active Users\* Android Smartphones, Q1 2015\*\*

United  
States

United  
Kingdom

Germany

Japan

South  
Korea

India

1



Google



Google



WhatsApp  
Messenger



Google



KakaoTalk



WhatsApp  
Messenger

2



YouTube



Maps



Google



LINE



YouTube



Google

3



Maps



YouTube



Maps



YouTube



네이버 - NAVER



Gmail

4



Facebook



Facebook



YouTube



Maps



Google



YouTube

5



Gmail



Chrome Browser



Chrome  
Browser



Gmail



KakaoStory



Facebook

6



Chrome Browser



WhatsApp  
Messenger



Facebook



spモードメール



BAND



Chrome Browser

7



Messenger



Gmail



Gmail



Chrome Browser



Facebook



Maps

8



Google+



Messenger



Google+



Google+



Google+



Google+

9



Drive



Google+



Messenger



Facebook



네이버 지도 - Naver  
Map



Truecaller

10



Instagram



eBay



Clean Master



Twitter



Chrome Browser



MX Player

\* Includes pre-installed apps because of variation in pre-installed apps between devices and manufacturers.

\*\* Q1 2015 data calculated as a straight average of January, February, and March 2015 active user penetration.





# Top Apps Outside Games by Active Users\* Android Tablets, Q1 2015\*\*

United States

Japan

South Korea

India

1



Google



Google



KakaoTalk



Google

2



YouTube



YouTube



YouTube



WhatsApp Messenger

3



Chrome Browser



Maps



Google



YouTube

4



Gmail



Chrome Browser



네이버 - NAVER



Gmail

5



Facebook



Gmail



KakaoStory



Facebook

6



Maps



LINE



BAND



Chrome Browser

7



Google+



Google+



Chrome Browser



Maps

8



Netflix



spモードメール



Facebook



Google+

9



Messenger



Yahoo! Japan



Gmail



Messenger

10



Google Drive



ES File Explorer



Daum



MX Player

\* Includes pre-installed apps because of variation in pre-installed apps between devices and manufacturers.

\*\* Q1 2015 data calculated as a straight average of January, February, and March 2015 active user penetration.

## Appendix B: Game Usage Top Charts



# Top Games by Active Users iPhone, Q1 2015\*

United  
States

United  
Kingdom

Germany

Japan

South  
Korea

China

1



Trivia Crack



Crossy Road



Quizduell



LINE: Disney Tsum  
Tsum



Clash of Clans



Landlord Poker

2



Candy Crush  
Saga



Candy Crush  
Saga



Candy Crush  
Saga



Puzzle & Dragons



Everybody's  
Marble



Happy Elements

3



Candy Crush  
Soda Saga



Clash of Clans



Clash of Clans



Monster Strike



OvenBreak for  
Kakao



WeChat Dash

4



Clash of Clans



Candy Crush  
Soda Saga



Candy Crush  
Soda Saga



Q...



Crossy Road



Craz3 Match

5



Modern Combat  
5: Blackout



8 Ball Pool™



2048



LINE PokoPoko



Anipang 2



WeFire

6



UNO™ & Friends



ZigZag



Quizduell im  
Ersten



Clash of Clans



SimCity BuildIt



Clash of Clans

7



Crossy Road



2048



The Simpsons™:  
Tapped Out



Candy Crush  
Saga



Candy Crush for  
Kakao



We Fly

8



Subway Surfers



Subway Surfers



4 Bilder 1 Wort



FINAL FANTASY  
Record Keeper



Seven Knights for  
Kakao



2048

9



Words With  
Friends



Stick Hero



Crossy Road



Candy Crush  
Soda Saga



Hero for Kakao



Boom Beach

10



Game of War -  
Fire Age



Boom Beach



Hay Day



Ingress



Monster Taming



Candy Crush  
Saga (WeChat)



# Top Games by Active Users iPad, Q1 2015\*

## United States

## Japan

## China

1



Candy Crush Saga



LINE: Disney Tsum Tsum



Clash of Clans

2



Candy Crush Soda Saga



Puzzle & Dragons



Boom Beach

3



Modern Combat 5: Blackout



Monster Strike



Happy Elements

4



UNO™ & Friends



Clash of Clans



Asphalt 8: Airborne

5



Clash of Clans



Candy Crush Saga



Landlord Poker

6



Trivia Crack



SimCity BuildIt



Hearthstone

7



Game of War – Fire Age



Hay Day



Plants vs. Zombies 2

8



Subway Surfers



Candy Crush Soda Saga



SimCity BuildIt

9



Crossy Road



Taiko no Tatsujin



Carrot Fantasy 2

10



Farm Heroes Saga



Q...



WeChat Dash



# Top Games by Active Users Android Smartphones, Q1 2015\*

United  
States

United  
Kingdom

Germany

Japan

South  
Korea

India

1



Trivia Crack



Candy Crush  
Saga



Quizduell



LINE: Disney Tsum  
Tsum



Everybody's  
Marble



Candy Crush  
Saga

2



Candy Crush  
Saga



Candy Crush  
Soda Saga



Candy Crush  
Saga



Puzzle & Dragons



Anipang 2 for  
Kakao



Subway Surfers

3



Clash of Clans



Crossy Road



Clash of Clans



Monster Strike



OvenBreak for  
Kakao



Temple Run 2

4



Candy Crush  
Soda Saga



Clash of Clans



Candy Crush  
Soda Saga



Q



Clash of Clans



Candy Crush  
Soda Saga

5



Words Words  
With Friends



Solitaire



Crossy Road



LINE Pokopang



Crossy Road



Hill Climb Racing

6



Crossy Road



8 Ball Pool



Quizduell  
PREMIUM



LINE PokoPoko



Candy Crush  
Kakao



Clash of Clans

7



Solitaire



Farm Heroes  
Saga



Hill Climb Racing



Candy Crush  
Saga



Seven Knights for  
Kakao



Teen Patti

8



Subway Surfers



Don't Tap The  
White Tile



Subway Surfers



The World of  
Mystic Wiz



Anipang for  
Kakao



My Talking Tom

9



Farm Heroes  
Saga



Subway Surfers



4 Bilder 1 Wort



Clash of Clans



Monster Taming



Dr. Driving

10



Hill Climb Racing



Temple Run 2



Farm Heroes  
Saga



FINAL FANTASY  
Record Keeper



Minecraft -  
Pocket Edition



Chess Free



# Top Games by Active Users Android Tablets, Q1 2015\*

United States

Japan

South Korea

India

1



Candy Crush Saga



Puzzle & Dragons



Clash of Clans



Candy Crush Saga

2



Candy Crush Soda Saga



LINE: Disney Tsum Tsum



Everybody's Marble



Subway Surfers

3



Clash of Clans



Monster Strike



Anipang 2 for Kakao



Temple Run 2

4



Trivia Crack



Candy Crush Saga



OvenBreak for Kakao



Candy Crush Soda Saga

5



Subway Surfers



Clash of Clans



Crossy Road



Clash of Clans

6



Solitaire



Yokai Taisou



Minecraft - Pocket Edition



Hill Climb Racing

7



Farm Heroes Saga



LINE Pokopang



Anipang for Kakao



My Talking Tom

8



Words With Friends



The World of Mystic Wiz



Anipang Mahjong



Angry Birds

9



Pet Rescue Saga



LINE PokoPoko



Seven Knights for Kakao



Temple Run

10



Crossy Road



Candy Crush Soda Saga



Monster Taming



Hay Day