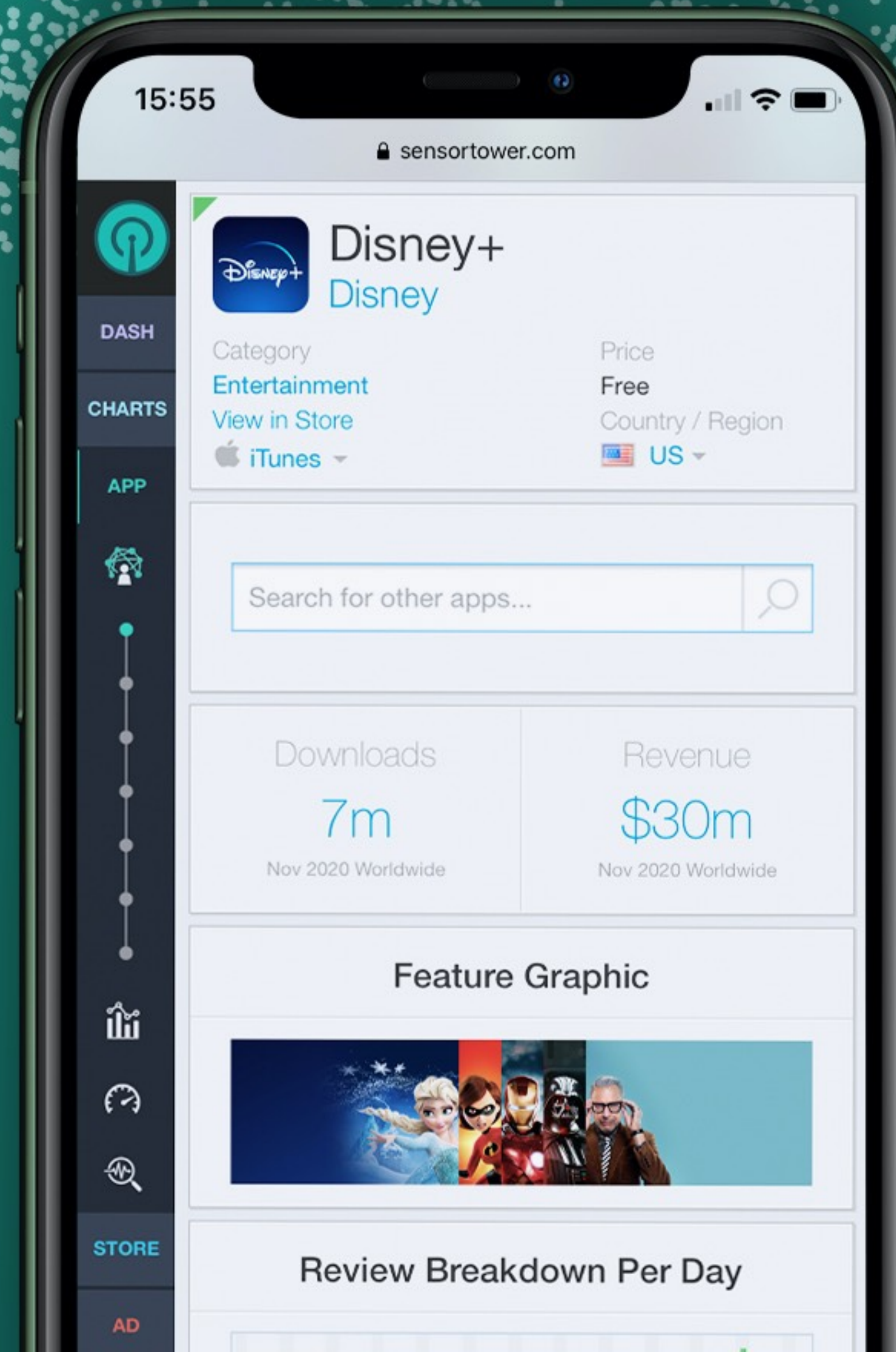




Mobile App Industry Trends 2021

How Mobile Apps are Adjusting to the New Virtual Lifestyle



Executive Summary: Highlights



Hypercasual continues to be a hot trend in mobile gaming, with the top hypercasual titles surpassing 10 billion installs in 2020. Easy-to-play games gained massive popularity amid COVID-19.



Stock trading and cryptocurrency apps continue to see high volume in demand going into the new year. IQ Option and Expert Option were the top two trading apps by downloads in 2020.



More core games are adopting in-app subscription models. Subscriptions in games saw a slight correlation with higher long-term retention rates than games without them in 2020.



More consumers being home has led to a 39 percent Y/Y growth rate among top smart home apps. Home-centric lifestyles have inspired consumers to invest in smart technology.

Industry Trends 2021: Table of Contents

Mobile Industry Trends 2021 report offers analysis on the latest trends for the category:

5. 2020 Industry Recap

An overview of the app industry in 2020 along with top categories and countries

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14. Hypercasual Game Adoption Takes Off

Examine how hypercasual games grew their massive popularity in 2020

18. Mobile Games Find Success with Subscriptions

A look at games that use in-app subscriptions and how it affects retention

22. Mobile Apps

25. The Booming Fintech Market

The global fintech market continues to experience high adoption

30. The Rise of 5G and Smart Home Apps

A look at smart home apps and how quarantines affected growth

33. Growth of Mobile Hangout Apps Accelerates

COVID-19's impact on adoption and demographics of social apps



About This Data: Methodology

Sensor Tower's Mobile Insights team compiled the download estimates provided in this report using the Sensor Tower Store Intelligence platform.

- Figures cited in this report reflect App Store and Google Play download estimates for January 1, 2018 through December 31, 2020.
- Download estimates presented are on a per-user basis, meaning that only one download per Apple or Google account is counted towards the total.
- Downloads of the same app by the same user to multiple devices, updates, or re-installs of the same app by the same user are not counted towards the total.
- Android app install estimates represent downloads from the Google Play Store only. Sensor Tower does not provide download estimates for third-party Android stores.

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2020 Mobile App Market Recap

2020: An Eventful Year in Mobile Apps

Top industry events in 2020 corresponding to installs

Monthly Worldwide Installs

Byte, the short video app from the co-founder of **Vine**, was released and generated 1.3M installs in its first week.

TikTok surpassed 120M worldwide downloads. **Disney+** launched in the European app stores.

Zoom crossed 140M worldwide downloads. **Quibi**'s mobile-only streaming service made its first appearance in April.

Animal Crossing: New Horizons spurred Nintendo's **Pocket Camp** mobile game to \$150M in spending. The **HBO Max** app released on both stores.

Multiple apps removed on the App Store in China due to strict enforcement of ISBN. India banned **TikTok** and Chinese apps.

Among Us gained 85M downloads in September. Oracle became the cloud provider for **TikTok** amid calls for its ban in the U.S.

Genshin Impact released on both app stores and generated \$60M in spending during its first week.

Mobile app spending surpassed a record high of \$400 million on Christmas Day. **Roblox** was the top app by worldwide spending.



Jan

Feb

Mar

Apr

May

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Jul

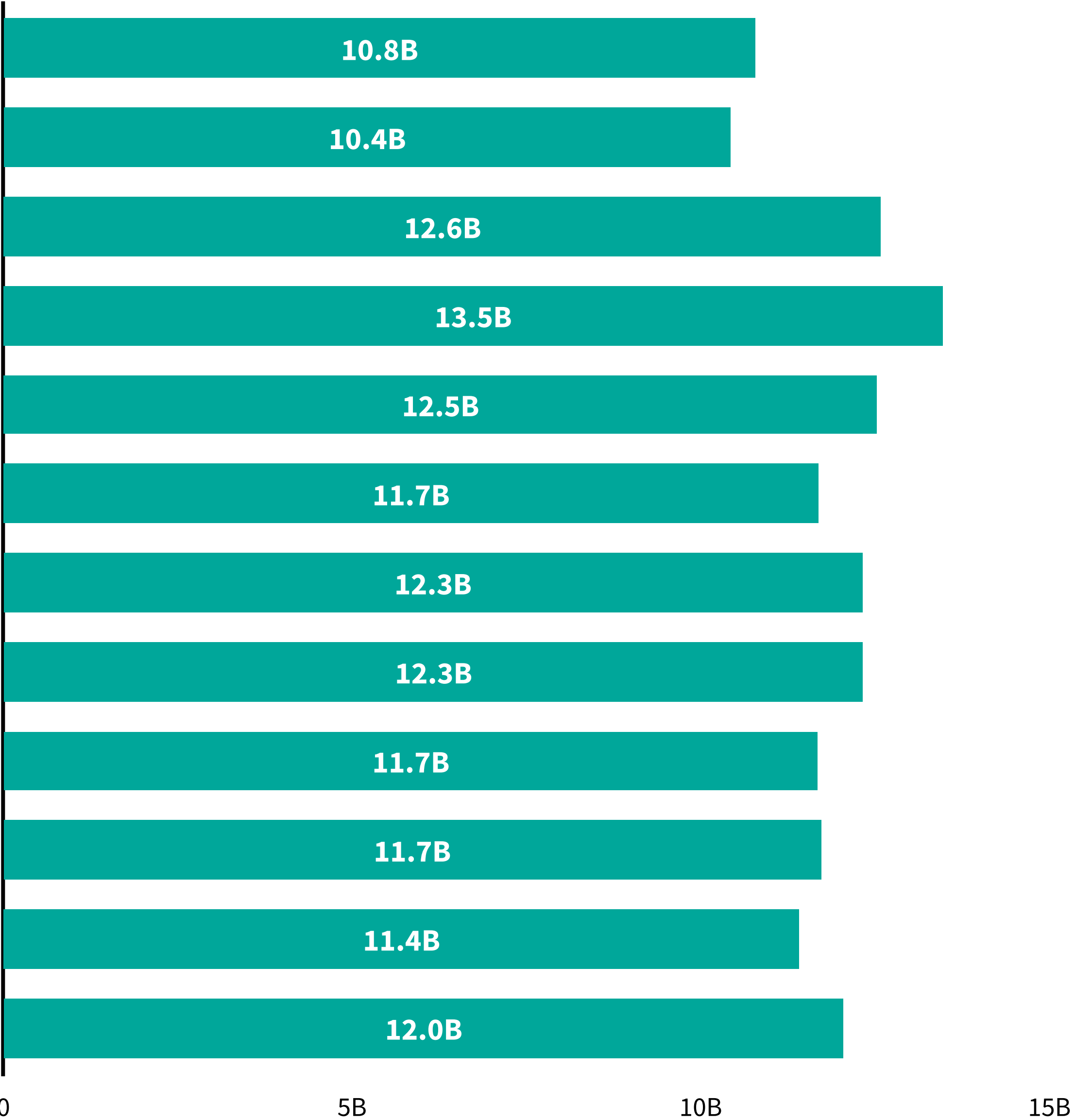
Aug

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Oct

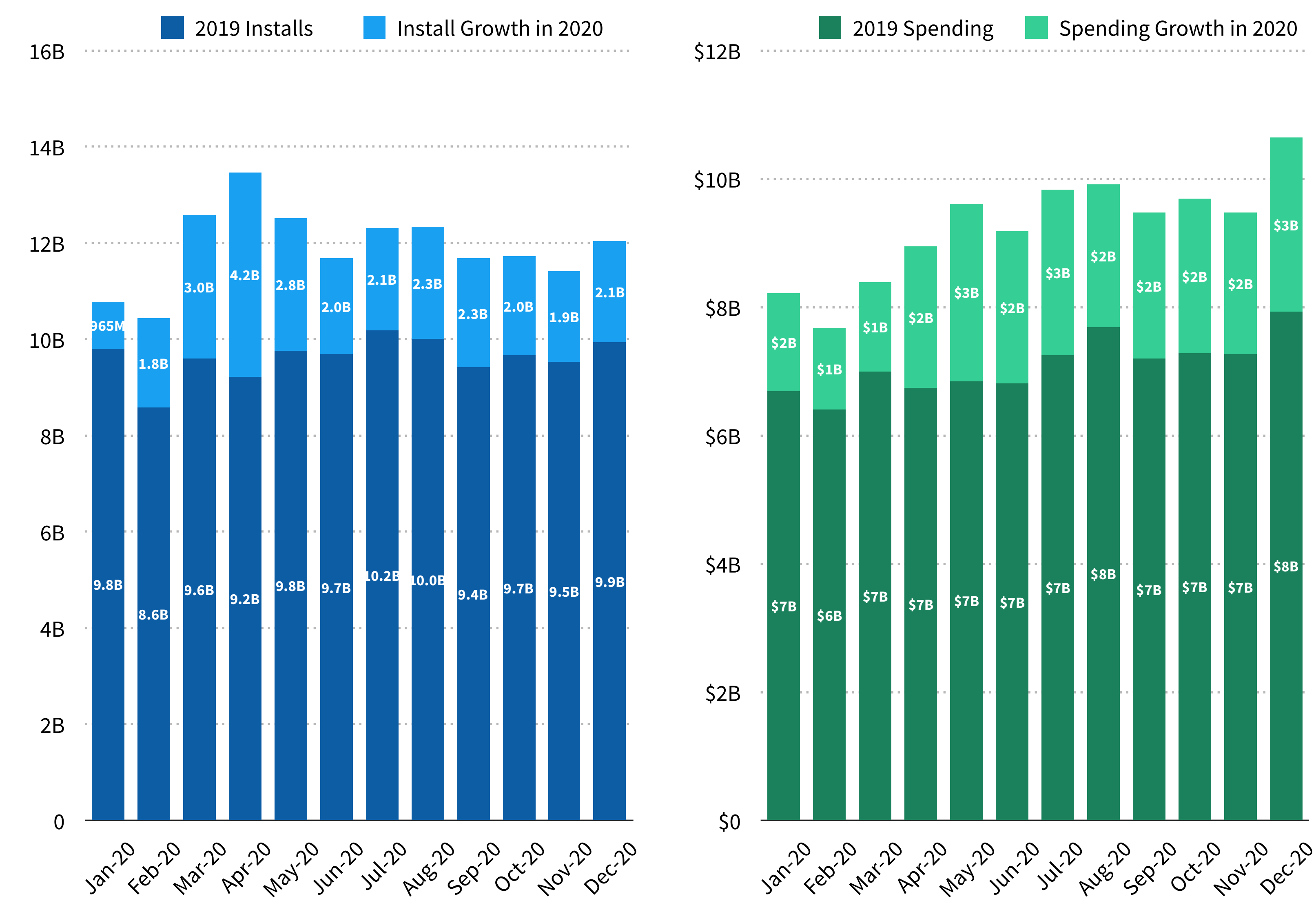
Nov

Dec



COVID-19 Spurred Lasting Lift in Mobile App Spending

Worldwide monthly installs and spending across the App Store and Google Play

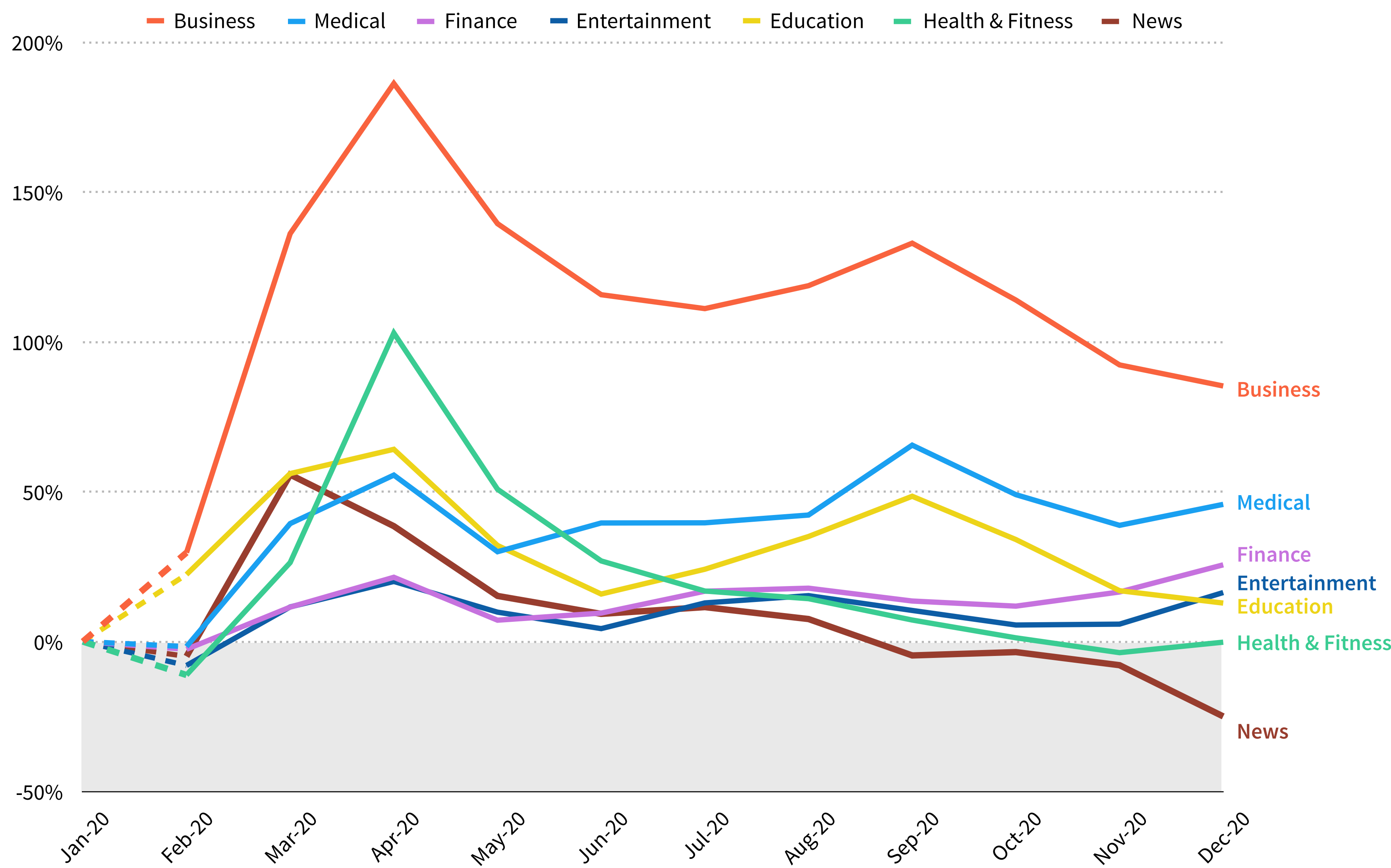


The 2020 holiday season drove mobile spending to a new record of \$10 billion in December, while monthly downloads surpassed 12 billion for the sixth time in 2020.

COVID-19 boosted the year-over-year spending growth rate for monthly installs and revenue to above 30 percent throughout the year after March, as opposed to an average of 21 percent in the beginning at the start of year. COVID-19’s impact on downloads may be short-lived, but spending trends indicate that apps are already seeing the benefits of adding these new users.

Growth of Essential Apps Remains High

Monthly install growth by category compared to January 2020



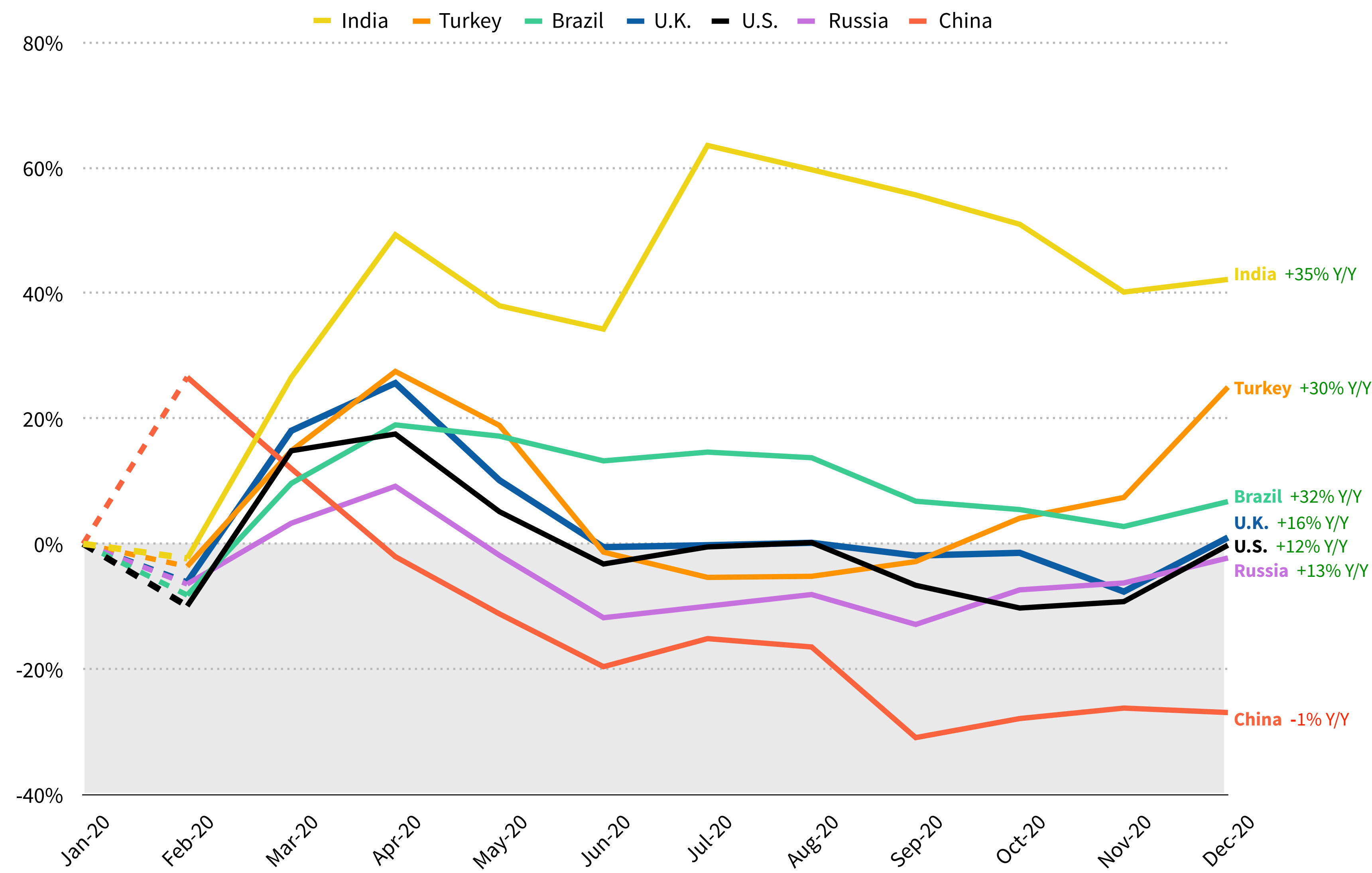
Business, Health & Fitness, and Education category apps saw the largest COVID-19 related boost following the outbreak of the virus. The demand for remote work and home workouts spiked along with downloads of related apps.

Contact-tracing and telemedicine apps continued to show high adoption growth throughout the year as COVID-19 raised awareness for health monitoring. The British contact-tracing app, NHS COVID-19, was the most downloaded medical app in 2020, accounting for 15 million installs.

Note Regarding Growth Rate
Each monthly growth rate is calculated based on the category downloads in January 2020.

India’s Mobile App Adoption Continues to Break Records

Monthly install growth by country compared to January 2020



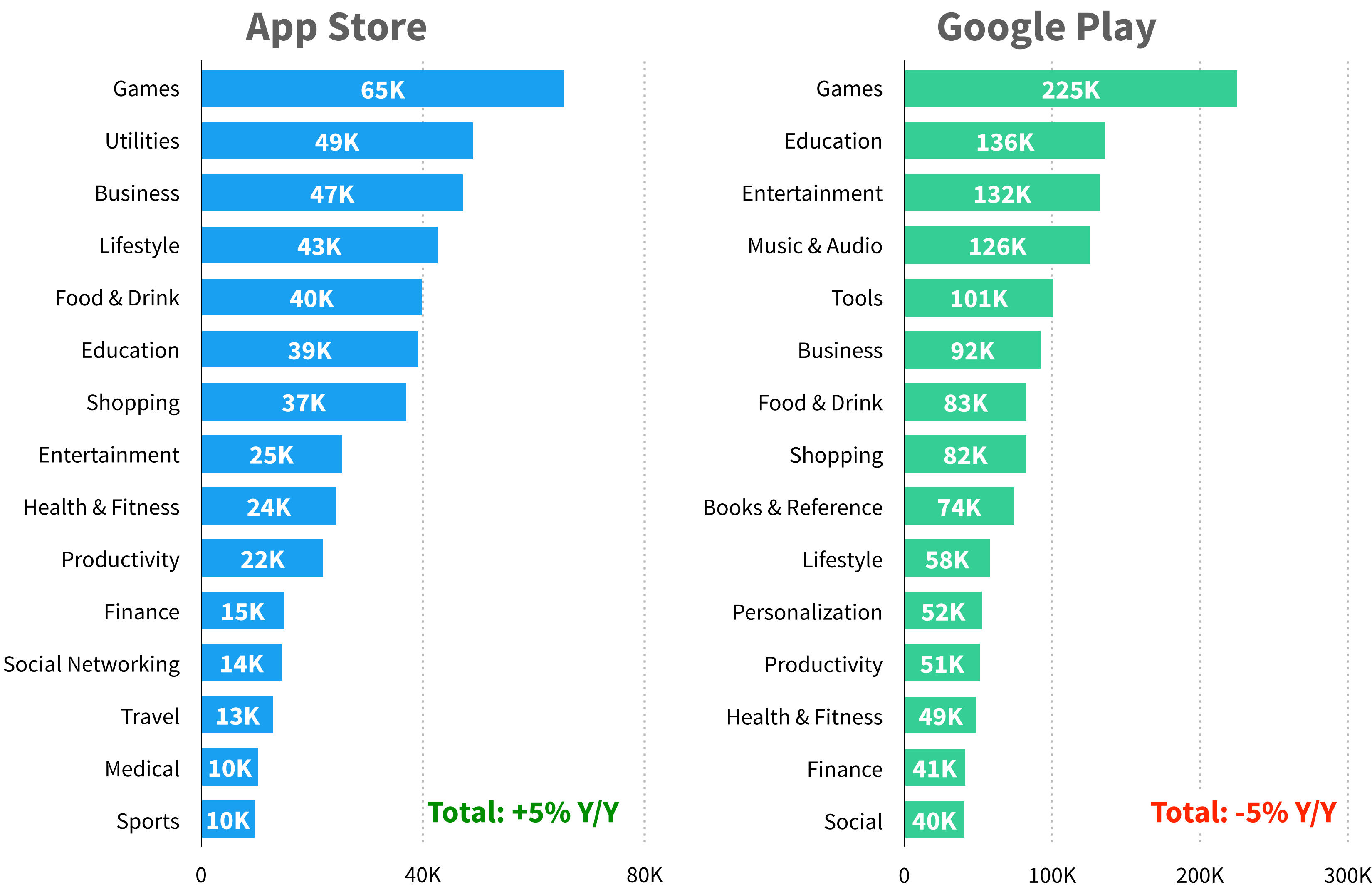
India and Brazil’s mobile markets are on a rise, achieving a year-over-year growth in mobile adoption of 35 percent and 32 percent, respectively, in 2020. Utility and Photo & Video category apps saw the most success outside mobile games in these markets.

While the largest markets have started to see downloads return towards pre-pandemic numbers or below, Turkey’s installs climbed in December. Another top growing market, Brazil, saw 32 percent Y/Y growth.

Note Regarding Growth Rate
Each monthly growth rate is calculated based on the country downloads in January 2020.

New Apps Releases Increase by 5% on the App Store

Apps released in 2020 on App Store and Google Play by top category



Approximately 5 percent more new apps were released on the App Store in 2020 than 2019, with Games accounting for 13 percent and Utilities accounting for 10 percent of new apps. Utilities and Business stood out as the top growing non-gaming categories, suggesting that increased demand created a market for new apps on the App Store.

The Education and Entertainment categories both saw an increase in the number of apps released in them on Google Play, each accounting for 8 percent of the new apps launched. Entertainment was the second most popular non-gaming category on Google Play by downloads in 2020.

Note Regarding New Apps

New apps include apps released in 2020 on at least one of the stores and have ranked among the top 1,500 apps by daily downloads at least once.













Mobile Gaming Trends











Among Us and Hypercasual Titles Lead the Top Mobile Games by Downloads

Quarterly top games by worldwide downloads on the App Store and Google Play











Q1 2020

1		Hunter Assassin Ruby Game Studio
2		Brain Out Focus Apps
3		Woodturning Voodoo
4		Johnny Trigger SayGames
5		PUBG Mobile Tencent
6		Garena Free Fire Garena Games
7		Draw Climber voodoo
8		Subway Surfer Sybo Games
9		Gardenscapes Playrix
10		Rescue Cut MarkApp











Q2 2020

1		Save The Girl AppLovin	NEW
2		Garena Free Fire Garena Games	+4
3		PUBG Mobile Tencent	+2
4		Gardenscapes Playrix	+5
5		Ludo King Gametion	NEW
6		Subway Surfers Sybo Games	+2
7		Hunter Assassin Ruby Game Studio	-6
8		Fishdom Playrix	NEW
9		Brain Test Unico Studio	NEW
10		Brain Out Focus Apps	-8

Q3 2020

1		Among Us InnerSloth	NEW
2		My Talking Tom Friends Outfit7	NEW
3		Scribble Rider Voodoo	NEW
4		Subway Surfers Sybo Games	+2
5		Garena Free Fire Garena Games	-3
6		Cube Surfer Voodoo	NEW
7		Stack Colors Voodoo	NEW
8		Tie Dye Crazy Labs	NEW
9		Ludo King Gametion	-4
10		PUBG Mobile Tencent	-7







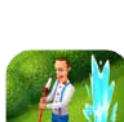
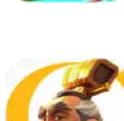


Q4 2020

1		Among Us InnerSloth	-
2		Join Clash 3D Supersonic Studios	NEW
3		Shortcut Run Voodoo	NEW
4		Garena Free Fire Garena Games	+1
5		Subway Surfers Sybo Games	-1
6		Tiles Hop Amanotes	NEW
7		Roblox Roblox	NEW
8		My Talking Tom Friends Outfit7	-6
9		PUBG Mobile Tencent	+1
10		Acrylic Nails Crazy labs	NEW









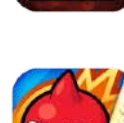
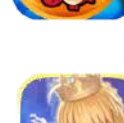
Core Titles Including Newcomer Genshin Impact Are Driving Player Spending

Quarterly top games by worldwide gross revenue on the App Store and Google Play











Q1 2020

1		PUBG Mobile Tencent
2		Honor of Kings Tencent
3		Monster Strike mixi
4		AFK Arena Lilith Games
5		Lineage 2M NCSOFT
6		Candy Crush Saga King
7		Gardenscapes Playrix
8		Rise of Kingdoms Lilith Games
9		Fate/Grand Order Sony Corporation
10		Coin Master Moon Active









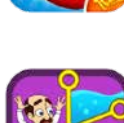

Q2 2020

1		PUBG Mobile Tencent	-
2		Honor of Kings Tencent	-
3		Roblox Roblox	NEW
4		Coin Master Moon Active	+6
5		Pokémon Go Niantic	NEW
6		Gardenscapes Playrix	+1
7		Candy Crush Saga King	-1
8		Three Kingdoms Strategic Alibaba	NEW
9		Monster Strike mixi	-7
10		Fate/Grand Order Sony Corporation	-1

Q3 2020

1		Honor of Kings Tencent	+1
2		PUBG Mobile Tencent	-1
3		Pokémon GO Niantic	+2
4		Roblox Roblox	-1
5		Coin Master Moon Active	-1
6		Fate/Grand Order Sony Corporation	+4
7		Gardenscapes Playrix	-1
8		Candy Crush Saga King	-1
9		DBZ Dokkan Battle Bandai Namco	NEW
10		Monster Strike Mixi	-1

Q4 2020

1		Honor of Kings Tencent	-
2		PUBG Mobile Tencent	-
3		Genshin Impact miHoYo	NEW
4		Pokémon GO Niantic	-1
5		Coin Master Moon Active	-
6		Roblox Roblox	-2
7		Rise of Kingdoms Lilith Games	+5
8		Candy Crush Saga King	-
9		Homescapes Playrix	NEW
10		Moonlight Blade Tencent	NEW

What's Trending:

Hypercasual Game Adoption Took Off During Stay-at-Home Orders

Mobile games prospered during quarantine when consumers were left with more time on their hands. Hypercasual was one of the fastest growing genres of mobile games, accumulating 10 billion installs across the top 1,000 such titles in 2020.

Key Takeaways:

- Adoption of the top 1,000 Hypercasual genre games grew 45 percent Y/Y in 2020. The continued rise in Hypercasual installs indicates that mobile games are reaching more casual players than ever before.
- Many Hypercasual genre games were among the top growing titles in 2020.

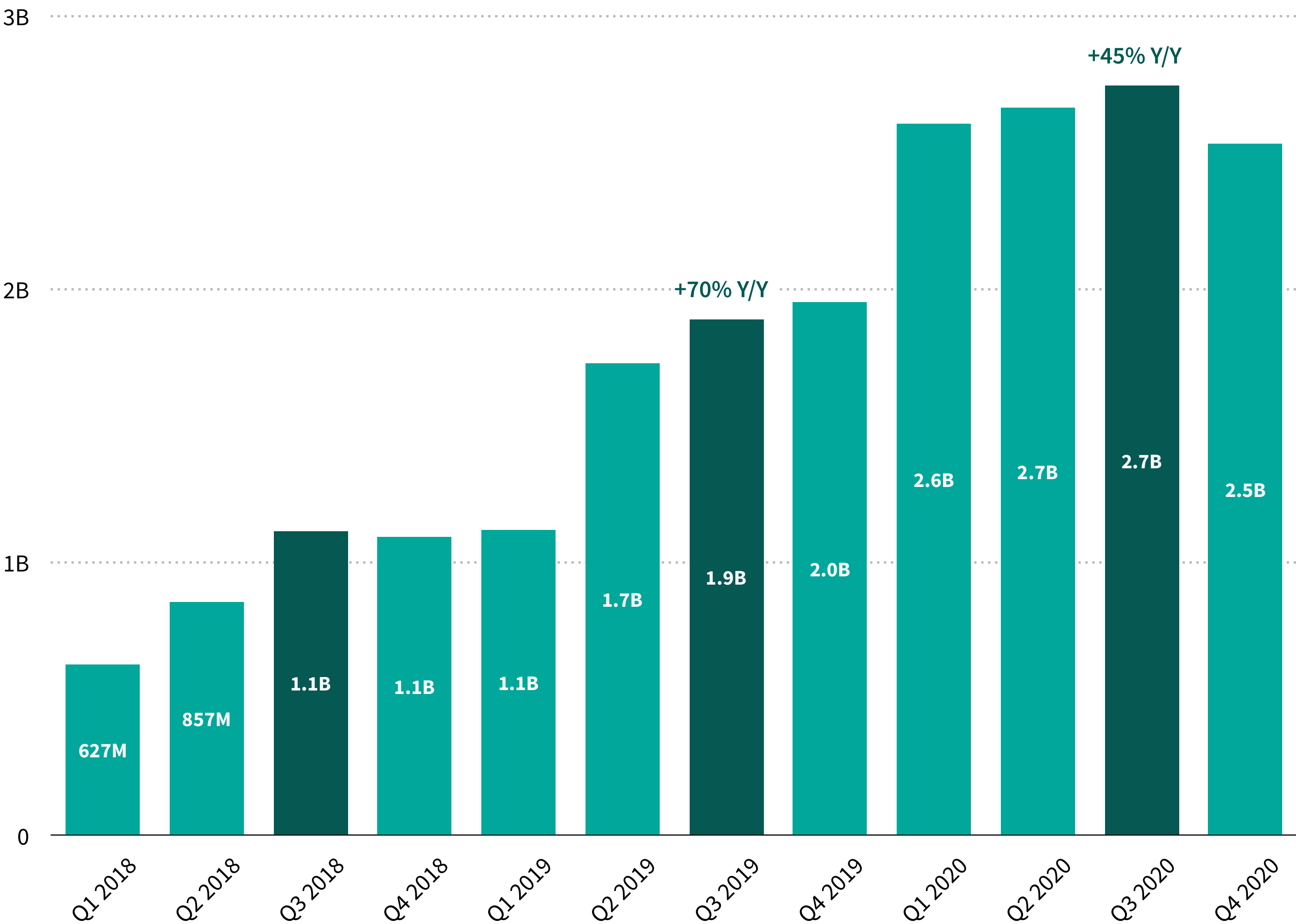


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Hypercasual Titles Surpassed 10 Billion Installs in 2020

Global downloads of top 1,000 hypercasual games by quarter



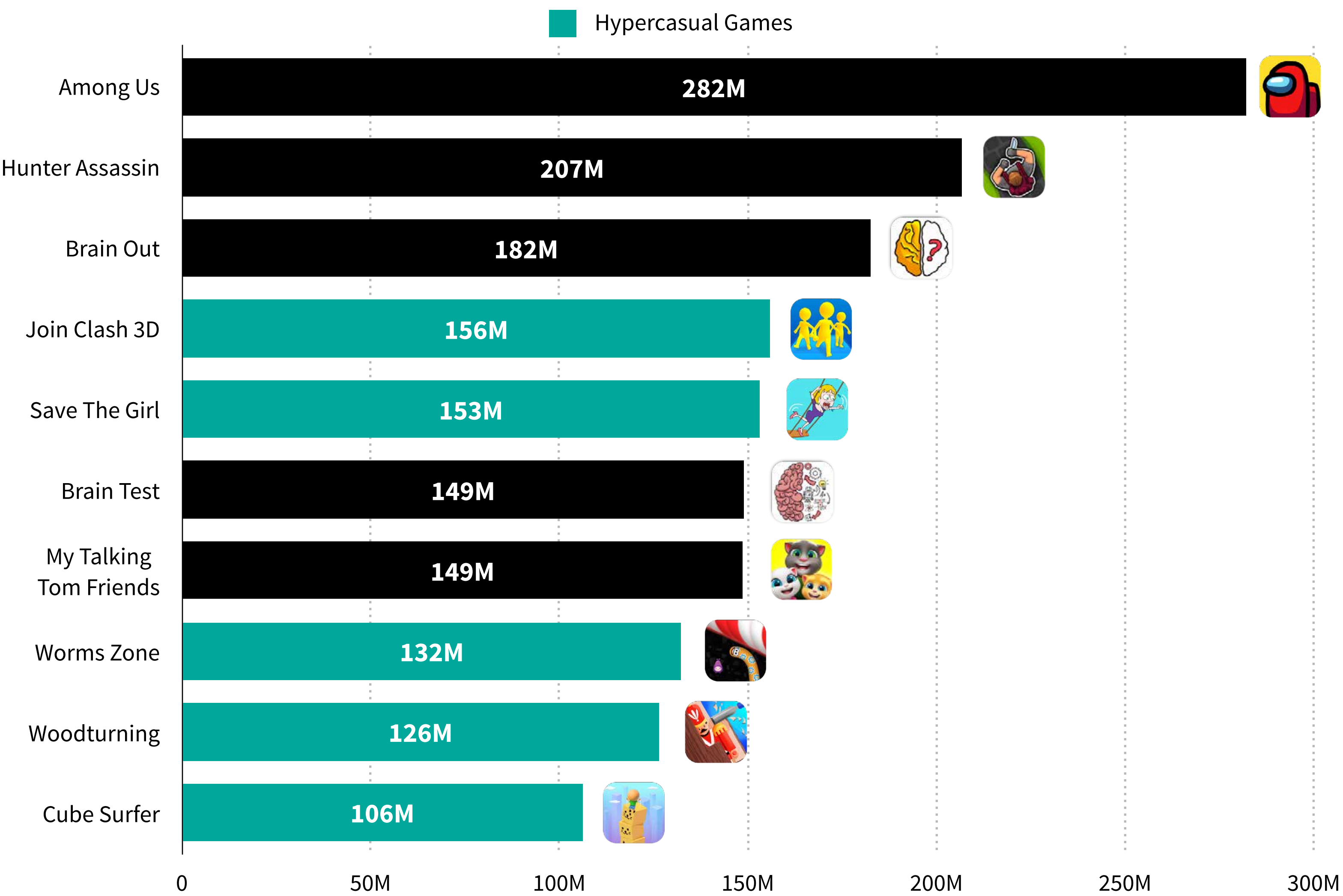
The top 1,000 hypercasual games surpassed 2 billion quarterly downloads for four consecutive quarters in 2020, with Q3 being their best performing quarter so far.

Hypercasual games saw massive popularity during stay-at-home orders and saw year-over-year growth of 45 percent in 3Q20.

Although Hypercasual games saw a decrease in adoption in Q4 2020, the genre is set to have a good year in 2021 if ad tracking related headwinds are diminished. Demand for Hypercasual games is remaining strong, with the top 10 titles accumulating 80 millions installs in the first two weeks of 2021.

Consumers Flock to Simple Games Amid Quarantine

Top growing games by year-over-year increase in downloads for 2020

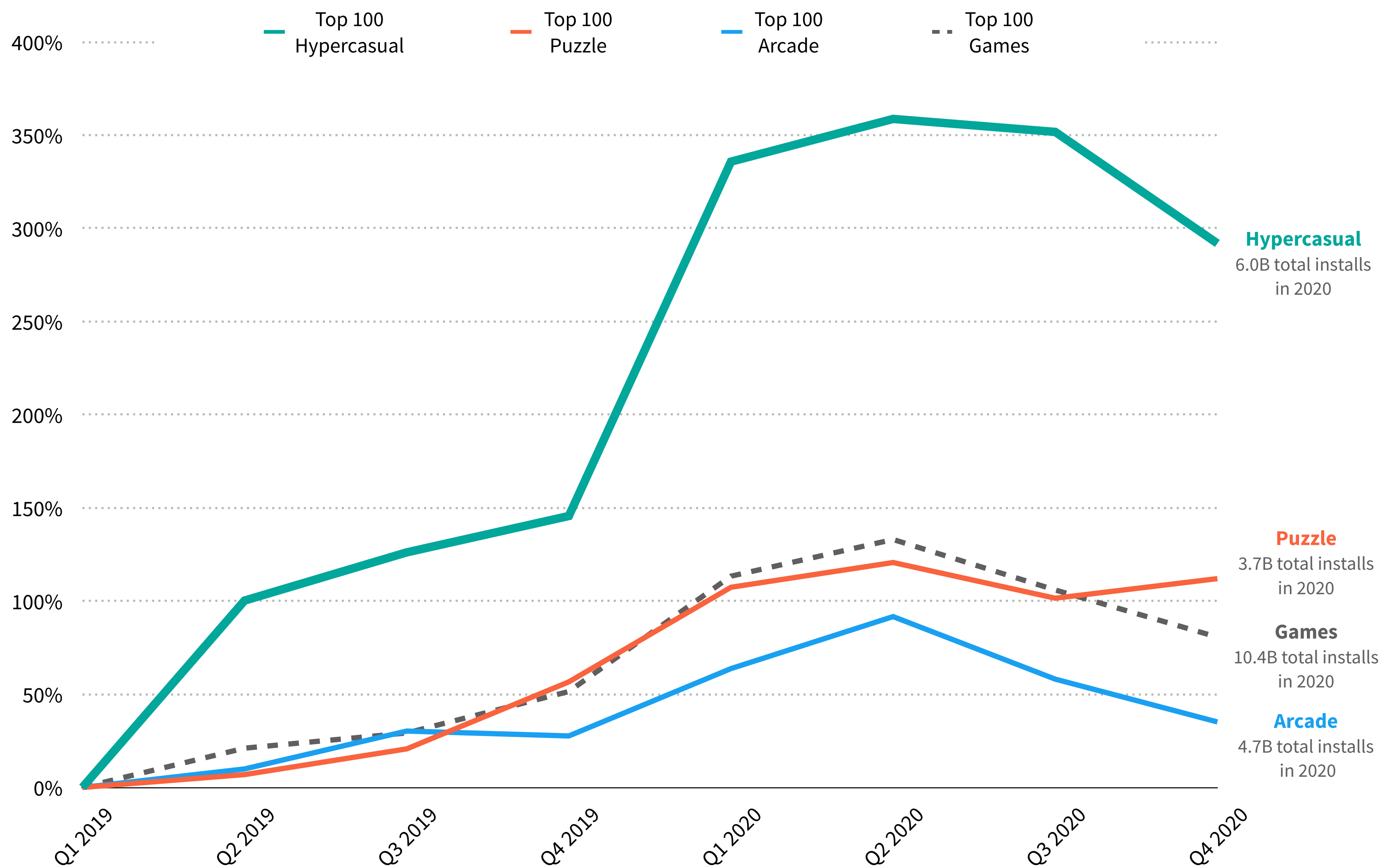


Hypercasual games dominated the top growing games chart, accounting for five out of the top 10 fastest growing games. Join Clash 3D, released in March 2020, ranked as the second most downloaded game in Q4 2020, competing with the viral multi-player title Among Us.

Amid the stress brought by COVID-19, mobile gaming attracted a significant number of first-time players in 2020. These consumers flocked to titles that encourage social interaction with friends or friend-like NPCs, such as Among Us and My Talking Tom Friends, or simple, easy-to-play titles that require minimal commitment from players.

Hypercasual Growth Rises Above Other Genres

Install growth among the top Hypercasual, Arcade, and Puzzle genre games vs. Q1 2019



Hypercasual is far-and-away the fastest growing genre in mobile gaming. The top 100 Hypercasual games saw growth of 350 percent over Q1 2019 downloads in Q2 and Q3 2020 while mobile games overall saw maximum growth of 133 percent in 2Q20.

The continued rise in adoption of Hypercasual genre games on mobile reaffirms the existence of a large market and strong demand for simpler titles. While these games monetize quite different from other genres—using in-game advertising—the fact that mid-core games have the potential to attract more users by adding modes aimed at beginning players shouldn’t be overlooked.

What's Trending:

Mobile Games Are Finding Success with In-App Subscription Models

Subscription-based monetization is becoming more pervasive among mobile games as a growing number of titles have found success with in-app subscriptions for optimizing revenue streams and retention rates.

Key Takeaways:

- Eight out of the top 15 grossing mobile games in 2020 have adopted in-app subscriptions as a monetization model.
- Casino and Strategy have seen the highest proportions of subscription games, accounting for 39 percent and 35 percent among their top apps, respectively.
- Subscription-based games saw higher long-term retention rates than non-subscription games in 2020.

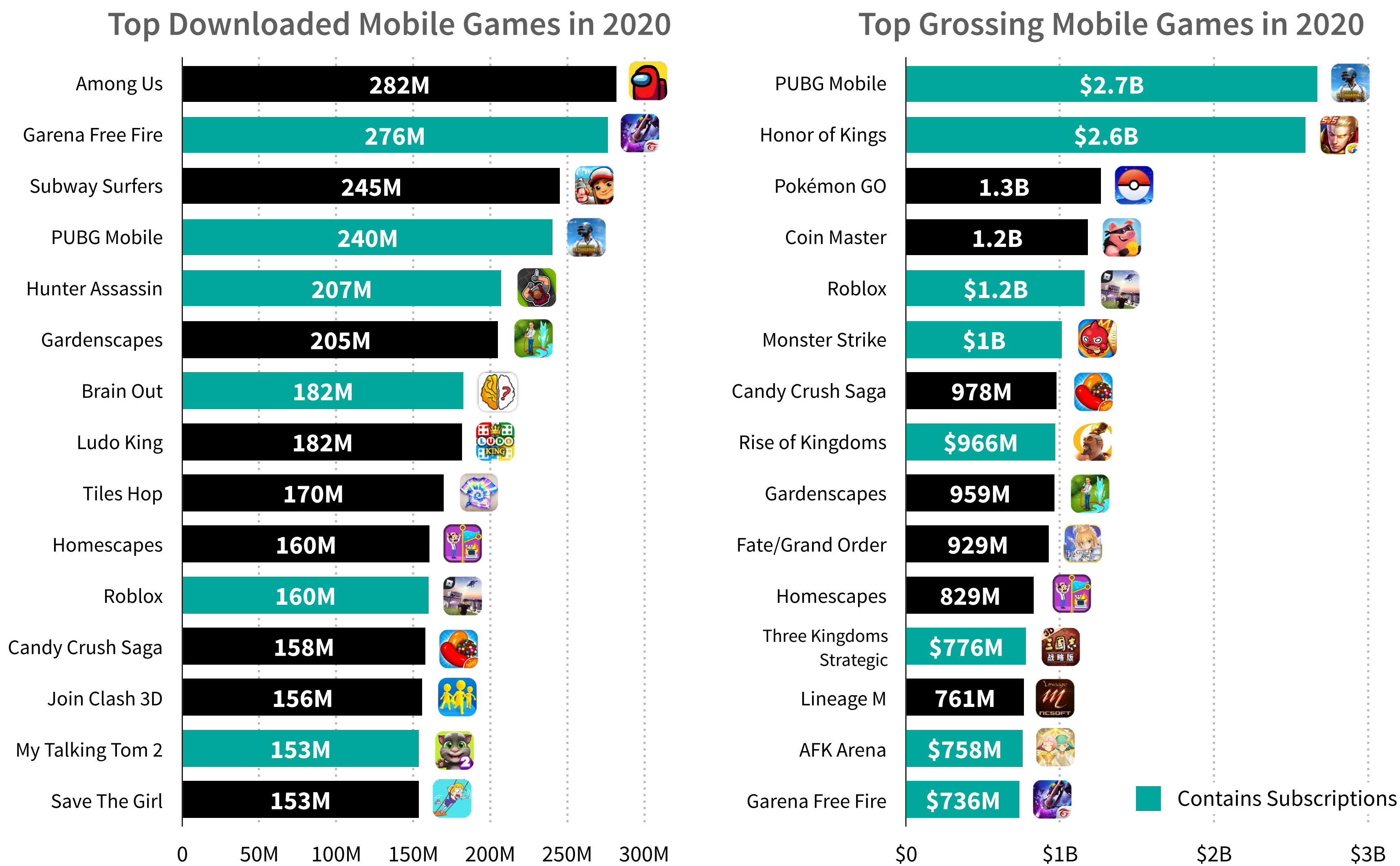


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Subscriptions Are Common Among Top Grossing Games

Top games by adoption and spending across the App Store and Google Play in 2020

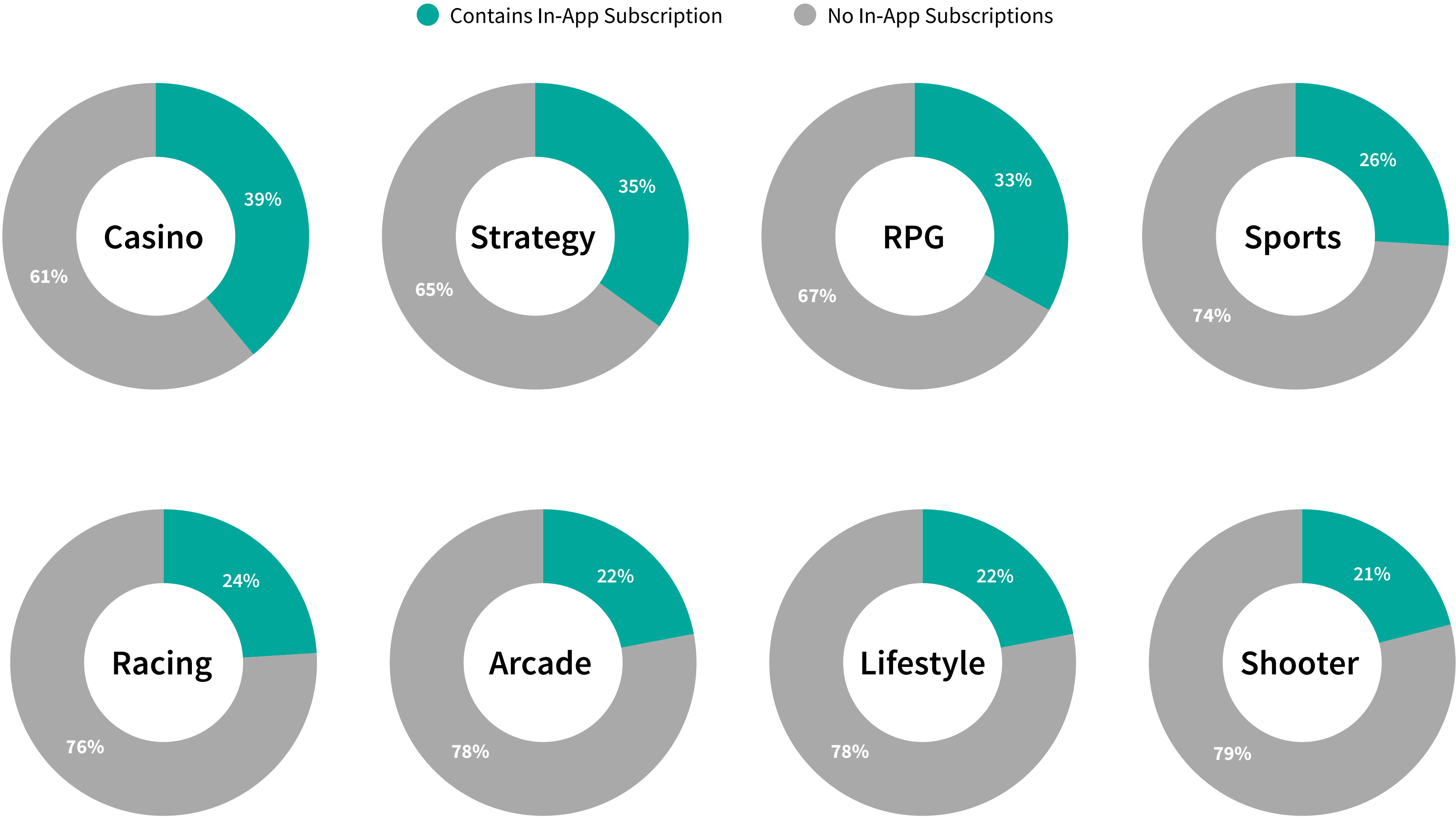


Multiple successful mobile games have now adopted in-app subscription models. Roblox was one of the pioneers of implementing a subscription model, called Builders Club (now Premium), into its mobile game. Newer titles, such as Hunter Assassin, launched with subscriptions from day one.

In-app subscriptions have the potential to boost revenue for top games. **Rise of Kingdoms, for instance, saw a 13 percent increase in user spending one month after the release of its monthly subscription package.**

Core Games Are More Likely to Adopt Subscriptions

Proportion of games with in-app subscriptions by genre



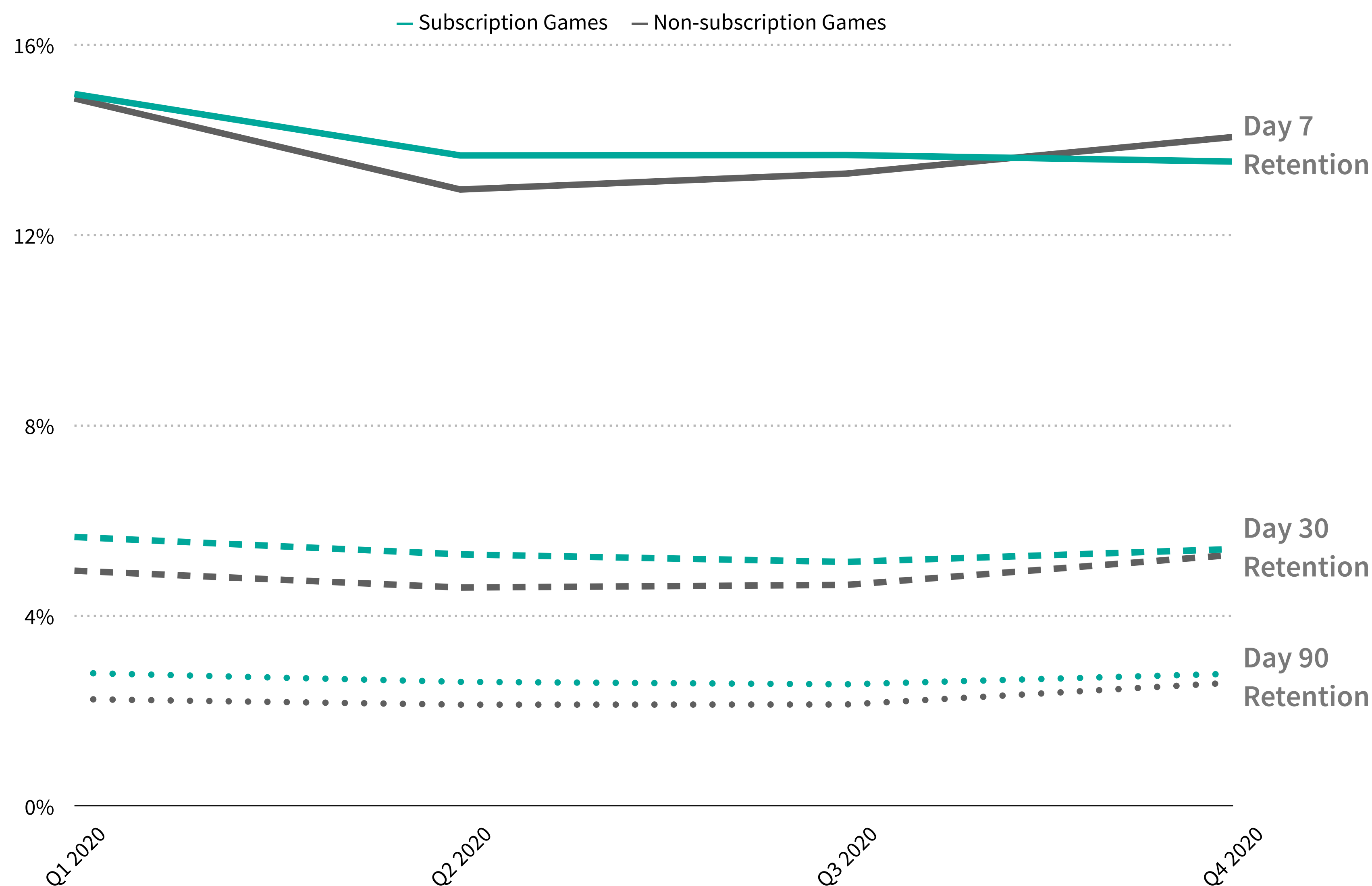
Approximately 39 percent of top Casino games utilize in-app subscriptions, followed by Strategy (35 percent) and RPG (33 percent). Complex titles with heavy user engagement appear to have found success using in-app subscriptions to boost revenue along with user retention.

Designing a subscription product and rewards based on demographics, genre, and gameplay features, in addition to accurately tailoring them to player needs, is essential to achieving the best possible ARPU.

Note Regarding Game Population
Proportion calculations utilized thousands of games in our Game Taxonomy, while comparing subscription games to non-subscription games by genre

Games with Subscriptions See Higher Longterm Retention

Day 7, 30, and 90 retention rates of the top 1,000 subscription and non-subscription games



Although the gap wasn't large, subscription-based games saw consistently higher retention rates than non-subscription games.

The difference was most obvious in Q2 2020 amid COVID-19, when non-subscription games saw a day 7 retention of 13 percent while subscription-based games saw a higher retention of 13.7 percent.

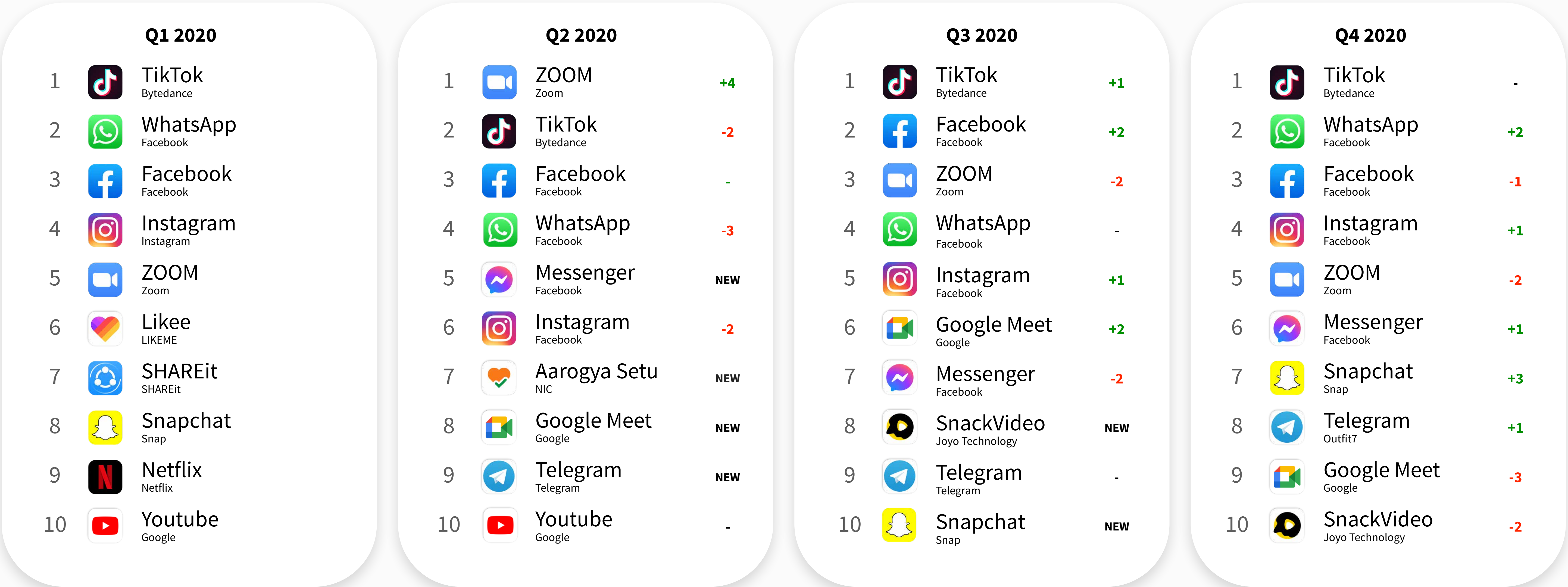
Collect player feedback on subscription products using App Intelligence's Review Analysis feature, which derives insights from user experience so you can make data-driven decisions on product improvements.



Mobile App Trends

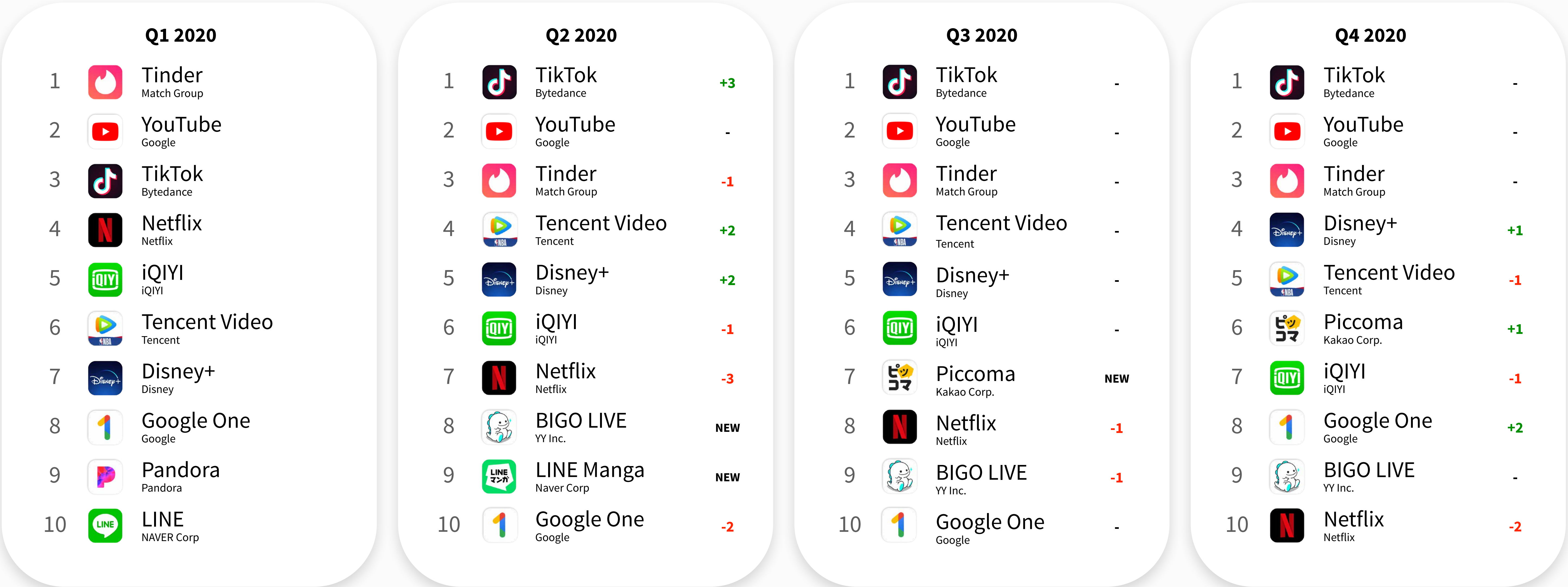
Social and Communication-Focused Apps Dominated Q4's Top 10 by Downloads

Quarterly top apps by worldwide downloads on the App Store and Google Play



Few Newcomers Shook Up the Global Revenue Charts in 2020

Quarterly top apps by worldwide gross revenue on the App Store and Google Play



What's Trending:

Fintech Reaches New Highs on Mobile, Led by Payment and Stock Trading

Fintech has been rapidly gaining popularity on mobile, and this was even more evident in 2020 when interest in the stock market and cryptocurrency were driven by a worldwide recession. In the mobile space, fintech apps responded to dynamic financial markets with a surge in app adoption.

Key Takeaways:

- Finance apps accumulated nearly 5 billion downloads worldwide in 2020 at a growth rate of 25 percent year-over-year
- Trading and cryptocurrency apps are among the fastest growing finance sectors in mobile, with IQ Option seeing the most downloads and growth in 2020.
- Payment apps have been on a safe and steady rise, while B2B became the next step for many top payment titles.

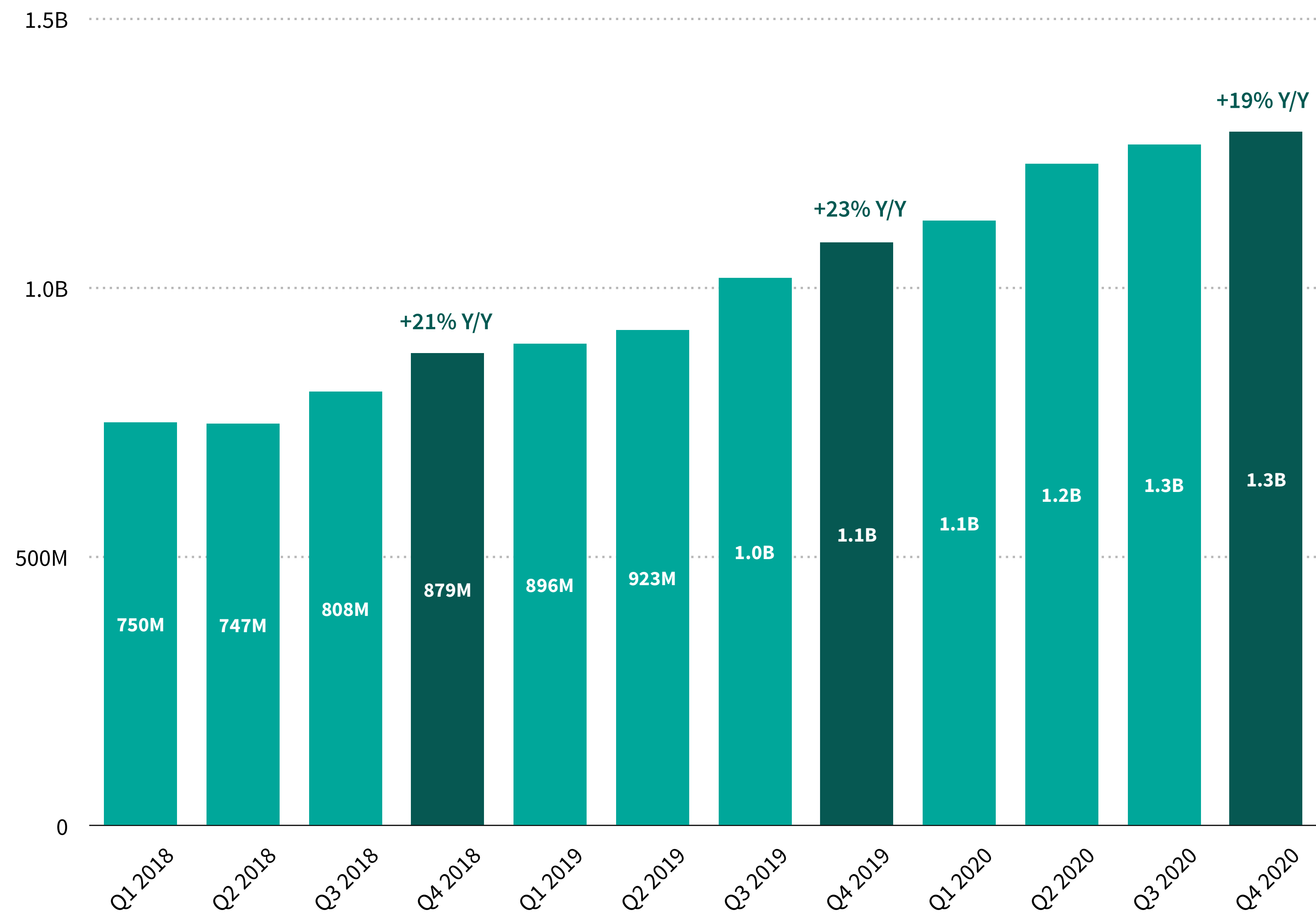


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Finance Apps Are Experiencing Steady Growth Over Time

Worldwide download growth of finance apps by quarter

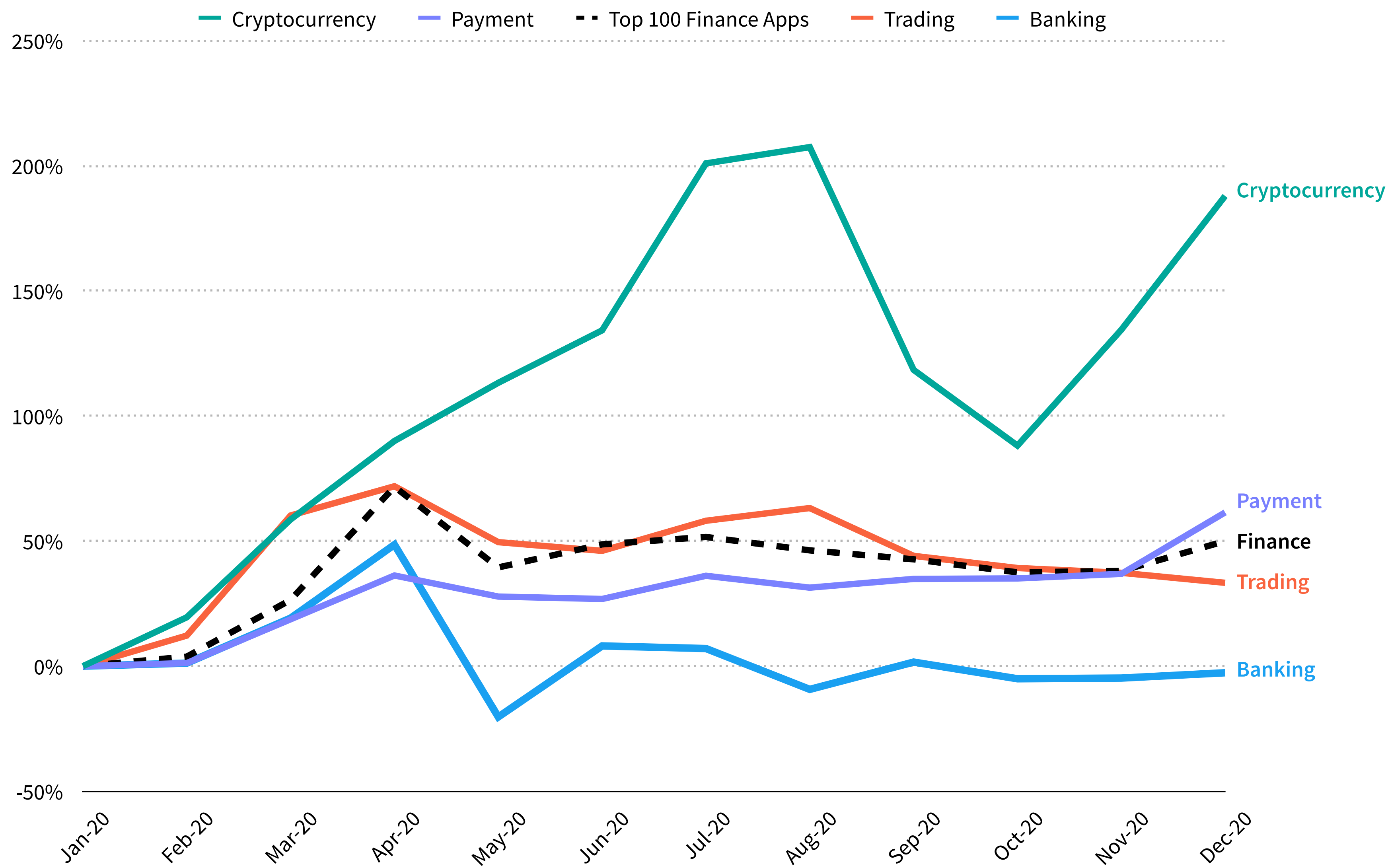


Worldwide finance app installs have been on a rise, growing at a rate of 19 percent year-over-year in Q4 2020. Finance apps saw steady growth during the study period, achieving a compound annual growth rate of 22 percent. Among the top finance apps in 2020, payment apps dominated the download charts, with **Google Pay and PayPal ranking No. 1 and No. 2 in the category.**

Download trends of finance apps further confirm the ongoing expansion of the global fintech market. **Payment apps are currently leading the adoption for this mobile sector.**

Cryptocurrency Apps Took Off Amid COVID-19

Install growth of payment, trading, banking, and cryptocurrency apps



Cryptocurrency app download growth spiked following the outbreak of COVID-19 in 2020.

Cryptocurrency apps saw high adoption growth of more than 200 percent in August compared to January, corresponding with record cryptocurrency trading volumes.

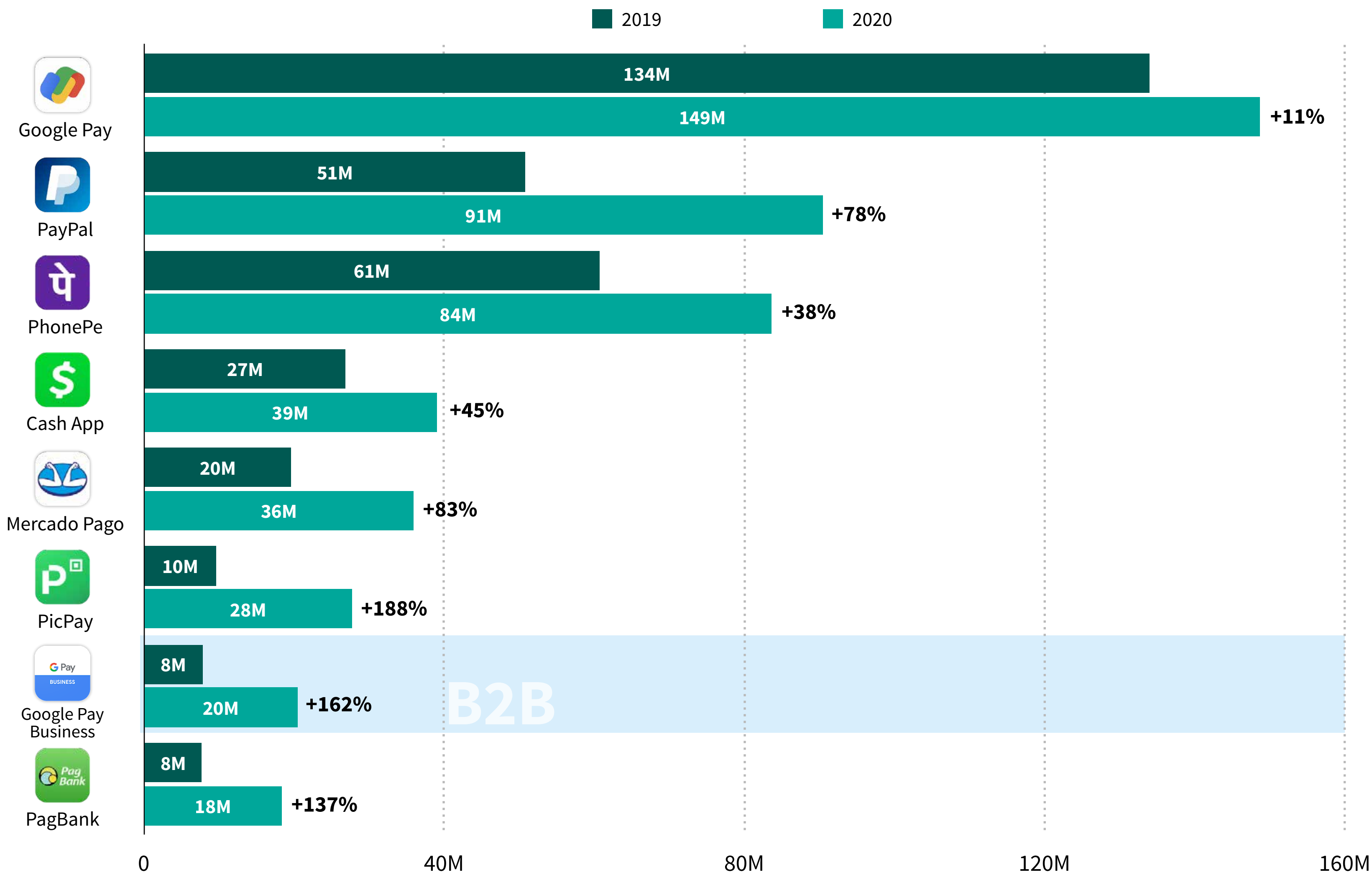
The rest of the Finance space also saw a boost following COVID-19. **Interestingly, that growth was short lived for mobile banking apps as downloads returned to pre-pandemic levels after a brief spike in March and April.**

Note Regarding Growth Rate

Each subcategory growth rate is calculated based on the monthly downloads compared to January 2020. Downloads are from the top 100 apps of Finance and Finance subcategories in 2020 by raw growth over 2019.

Payment Apps Are Trending Up, B2B In Particular

Top growing payment apps by worldwide download growth

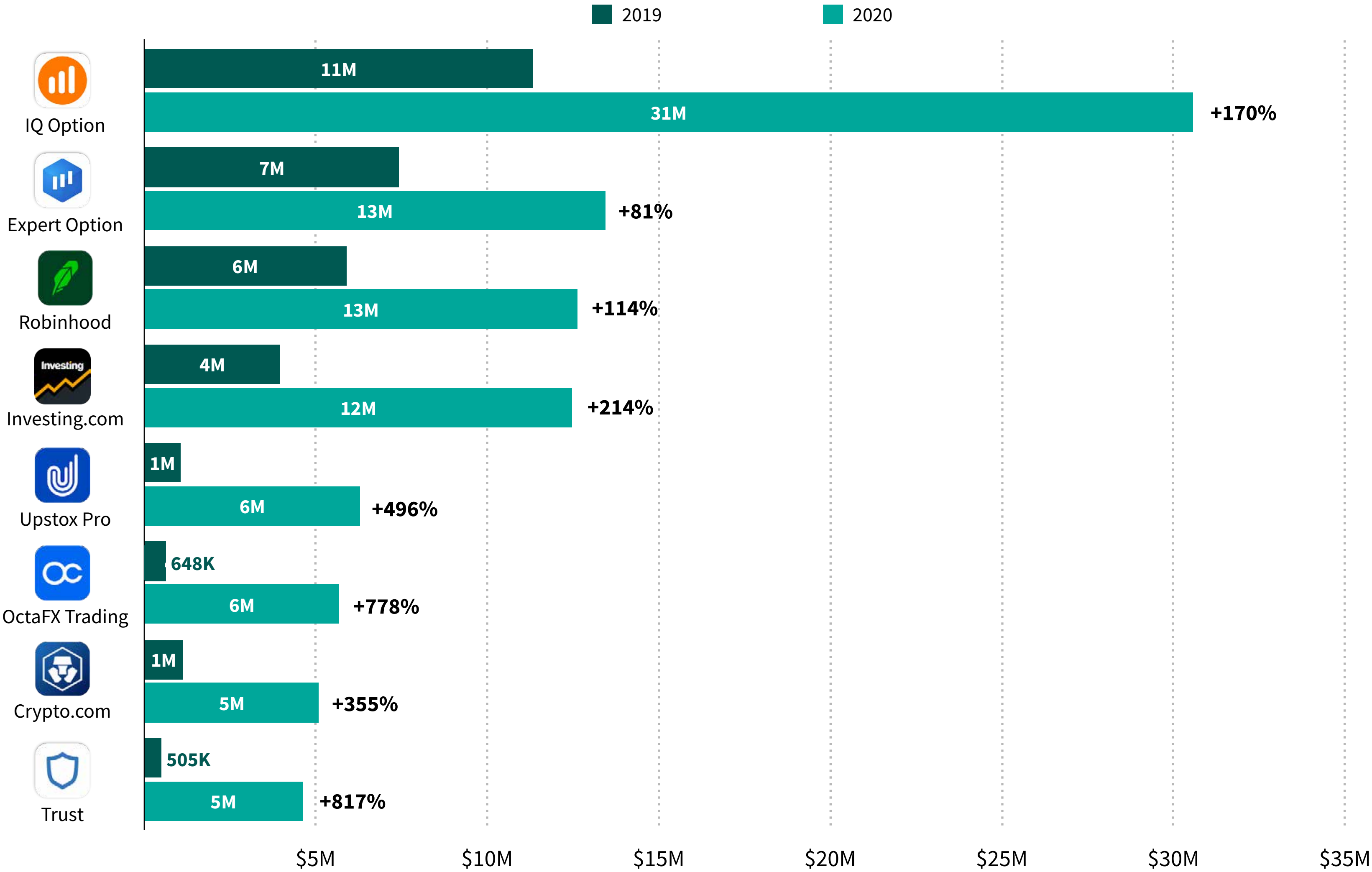


PayPal and PhonePe were the top growing payment apps by Y/Y growth, accounting for 40 million and 23 million in raw download growth, respectively. The two apps achieved this success in different ways: PayPal had at least 2 million downloads in 10 different countries in 2020, while 99 percent of PhonePe’s installs were from India.

Google Pay for Business, a business-to-business payment app, stood out for its high yearly growth percentage of 162 percent. **Top payment apps, such as Google Pay and PhonePe, have also seen major growth for their B2B versions.**

Trading and Crypto App Installs Rise as Markets Rebound

Top growing trading and cryptocurrency apps by worldwide download growth



IQ Option was the top growing trading app in 2020, with a total of 31 million downloads accumulated and year-over-year growth of 170 percent. The demand for trading apps surged in response to rebounding of stock and cryptocurrency markets later in the pandemic.

Top growing trading apps such as Upstox Pro and OctaFX Trading found most of their success in just a few key markets like India, Indonesia, and Pakistan. **Cryptocurrency apps including Crypto.com and Trust saw their installs more evenly distributed across many countries.**

What's Trending:

Smart Home Apps Soar Amid Stay-at-Home Orders and 5G Growth

With the faster speeds and greater bandwidth they offer, 5G networks are expected to host more smart devices than before, including smart home hardware. Smart home app adoption saw notable growth amid COVID-19, when consumers spent more time in their homes and on their mobile devices than ever before.

Key Takeaways:

- The top 10 smart home apps accumulated 151 million worldwide installs in 2020.
- COVID-19 created a boost in smart home app adoption that was seen outside of the holiday season in 2020.
- Google Play saw major growth in adoption for smart home apps in countries including India, Brazil, and Mexico, where installs doubled year-over-year.

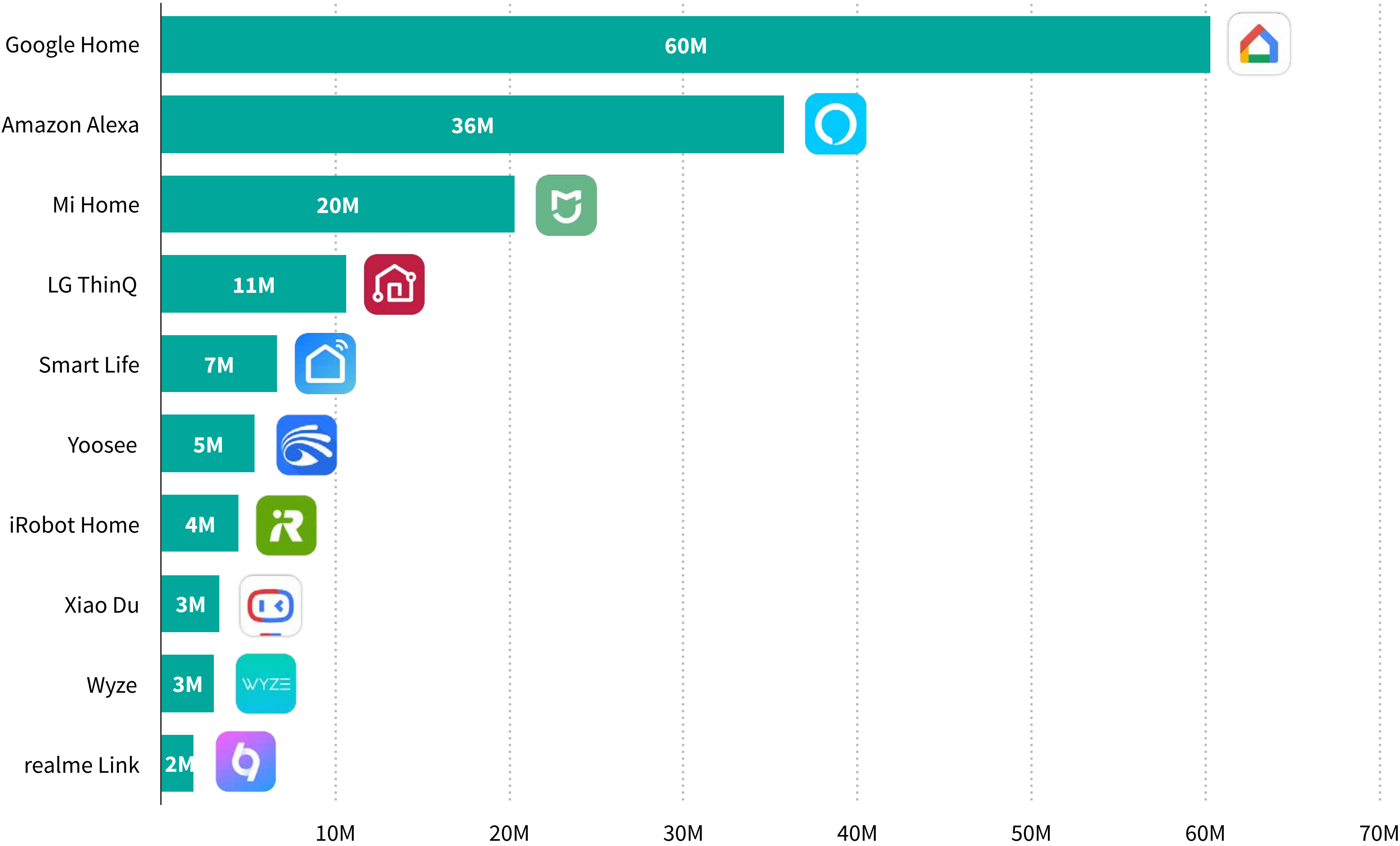


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Google Home Blazes the Path for Smart Home Apps

Worldwide downloads of top smart home apps in 2020

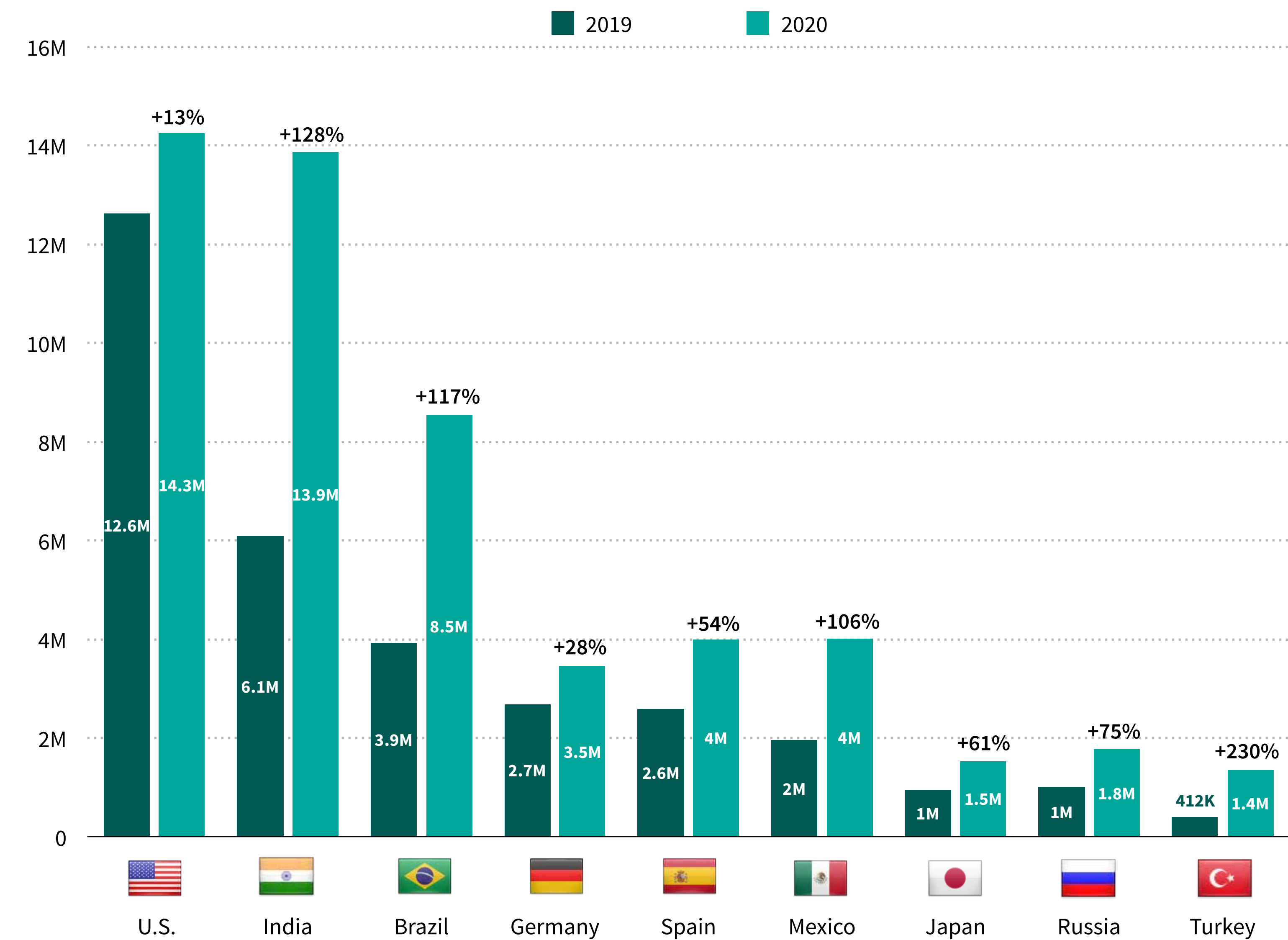


Google Home was the most downloaded smart home app in 2020, accounting for 60 million installs globally. Amazon Alexa was No. 2 on the chart with 36 million downloads. The top 10 smart home apps overall accumulated 151 million downloads across the App Store and Google Play.

COVID-19 has accelerated the growth of smart home apps. With more time spent at home, consumers are investing in technology to make their home-centric lifestyles more convenient and efficient.

Smart Home Apps See Greatest Growth on Android

Downloads of smart home apps on Google Play by country



Google Play has seen a major increase in adoption of smart home apps worldwide.

India, Brazil, and Mexico saw the most raw growth year-over-year, with more than double the downloads in 2020 than 2019 in each of these markets.

Smart home companies looking to expand into new markets can track app adoption to identify which ones show the highest growth potential. LG ThinQ provided a great example of this: After observing the expansion of Google Home and Amazon Alexa in Mexico, it localized its app for that market in June 2020 and saw its downloads spike in the second half of 2020.

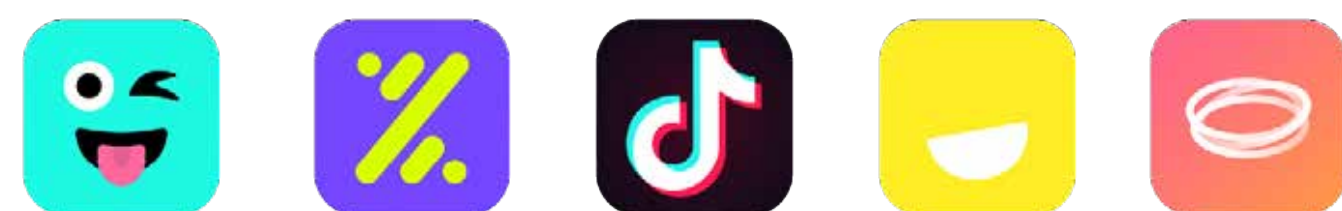
What's Trending:

Growth of Mobile Hangout Apps Is Accelerating

COVID-19 created a surprise shift in the social app space in 2020—the influx of younger users looking for ways to find friends and socialize in the time of school closures and stay-at-home orders. Apps that marketed themselves to this younger audience saw a rapid increase in first-time installs in early 2020.

Key Takeaways:

- The average age for users of top social apps dipped during the first three quarters of 2020. The pandemic increased demand for social apps among a younger user base.
- Top emerging social apps in 2020 like Wink, Yubo, and Hoop marketed themselves as ways to make new friends. While the features of these apps varied, they each promised a way to find and connect with friends during COVID-19 which was appealing to younger users.
- As age trends reverted towards pre-pandemic levels in Q4 2020, adoption for many of these friend finding apps also declined. Retaining these new users will be the challenge as schools begin to re-open in 2021.

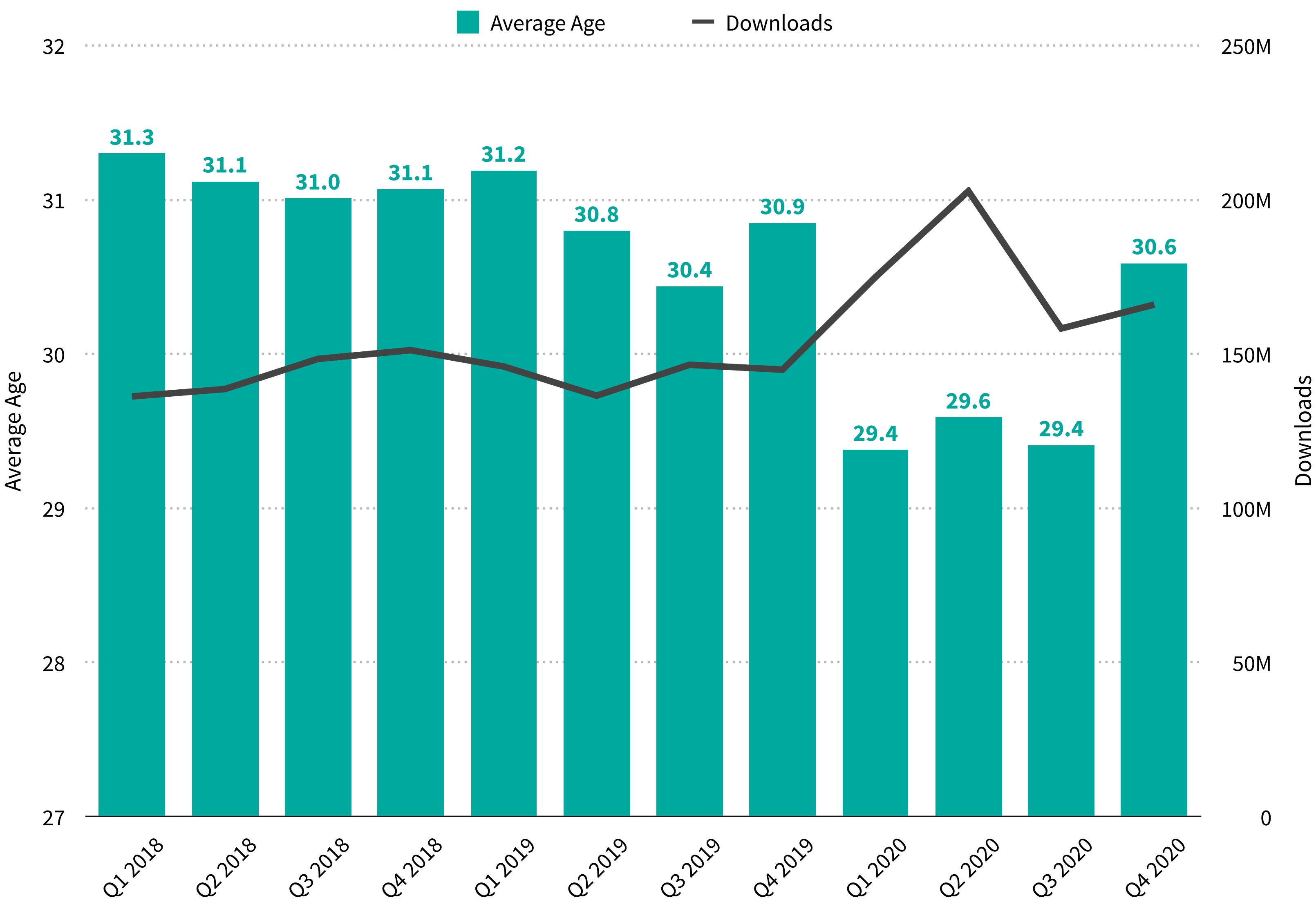


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Younger Users Embraced Social Apps Amid COVID-19

Quarterly average age and U.S. downloads for the top 100 social apps



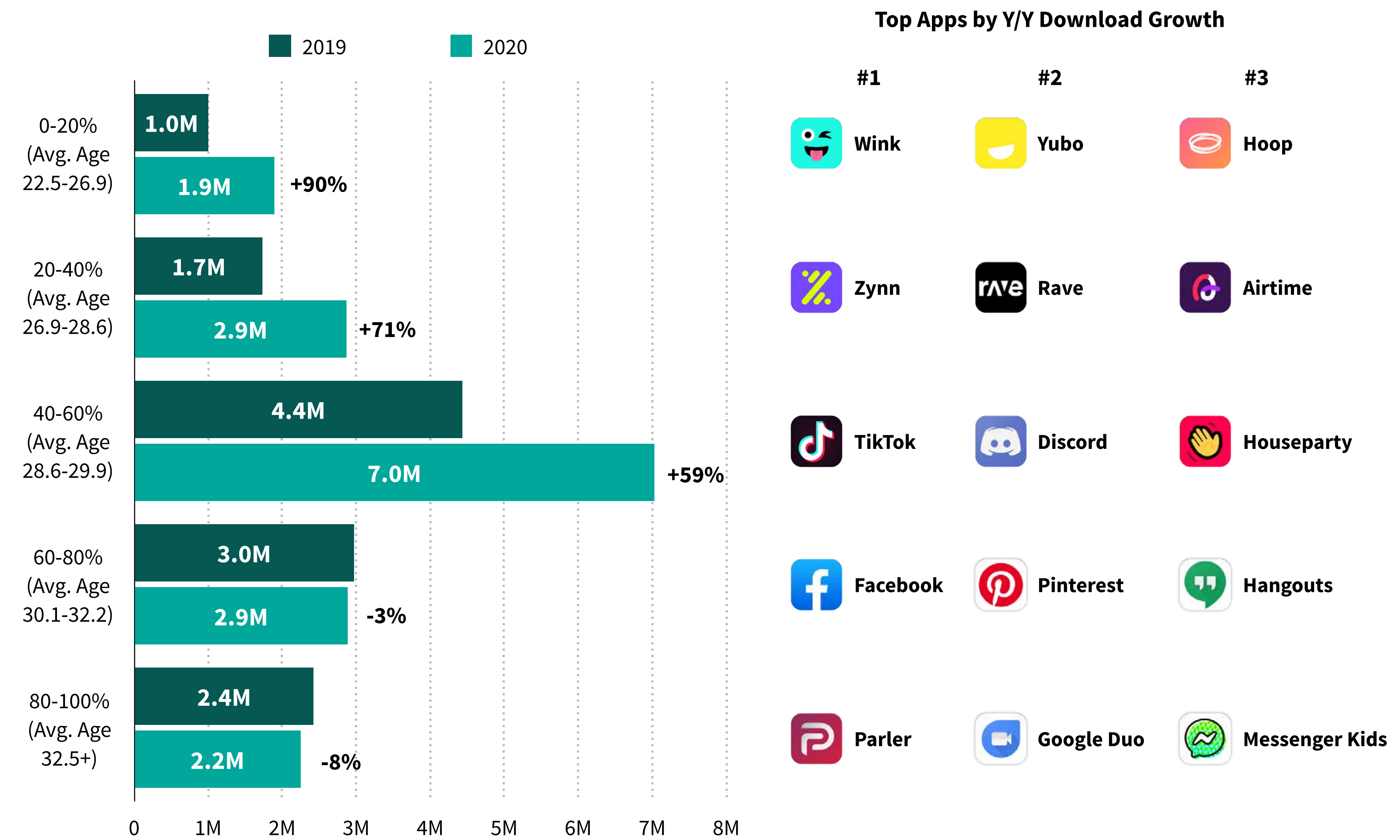
As downloads spiked during the COVID-19 pandemic in 2020, the average age among the top social apps dipped, suggesting that younger users drove a significant portion of the growth. Age trends reverted towards pre-COVID-19 levels by Q4 2020.

Younger users flocked to mobile social apps in amid school closures and social distancing orders. **Social apps will increasingly market themselves towards a younger age group to engage with a relatively untapped user base.**

Note Regarding Download and Age Estimates
Population of apps includes the top 100 apps by U.S. downloads each quarter across the App Store and Google Play. Apps include any with Social Networking as their primary App Store category or Social as their Google Play category. Average age is among the same top 100 apps, and is App Store only.

Apps with Younger Users are Growing Fastest

Growth in median U.S. installs by average age cohort among the top 100 social apps in 2020



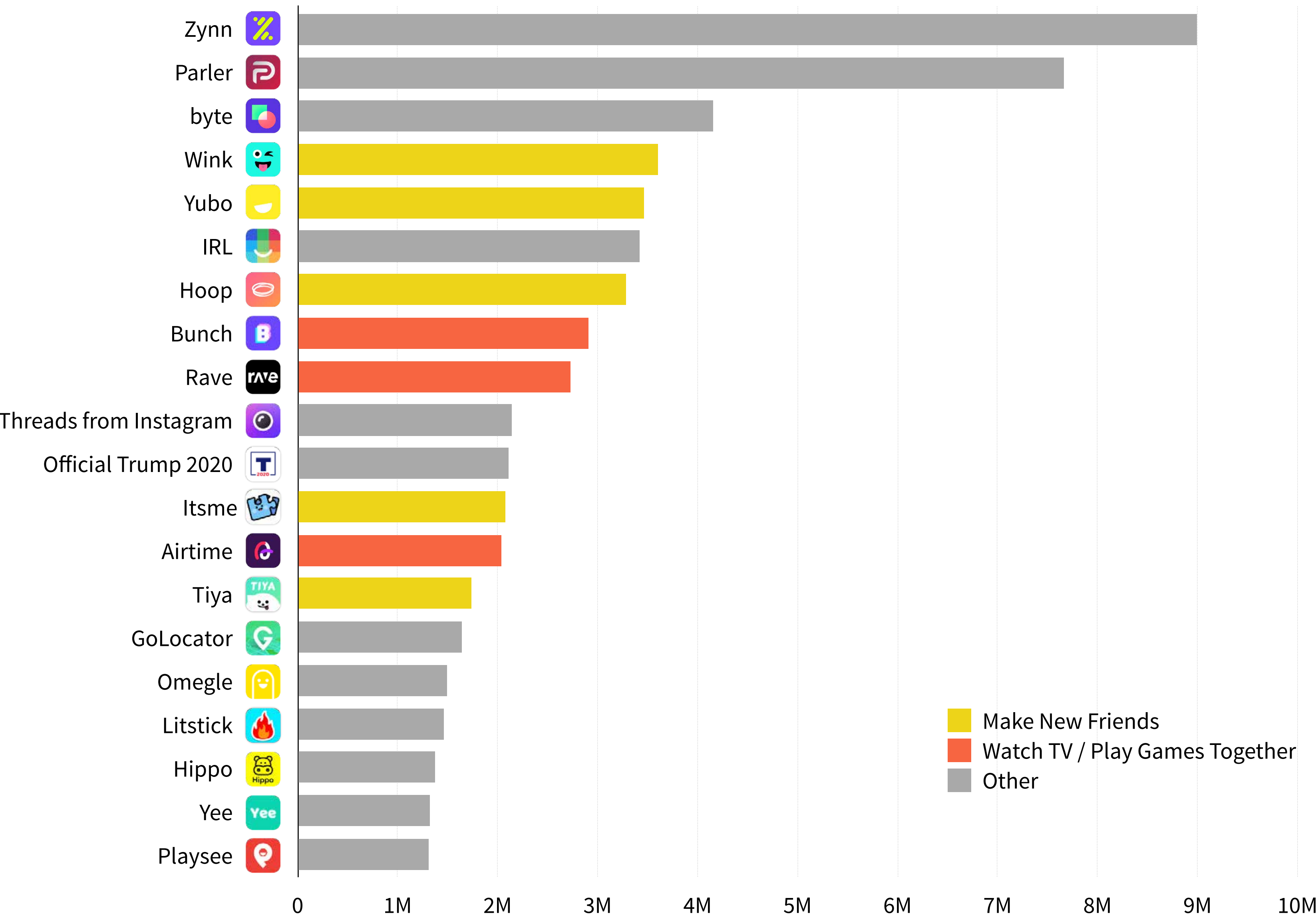
Apps popular among younger users saw their median downloads nearly double Y/Y in 2020, while the median downloads for apps with average age above 30 decreased. Top apps by download growth among the youngest user cohort included apps for finding friends and socializing in-app.

In 2020, the highest growth apps among older users were mostly well-established at the top of the category. Younger users provided opportunities for newly emerging apps.

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Top New Apps Focus on Socializing and Finding Friends

Top social apps by Y/Y U.S. download growth among those with < 3M U.S. installs in 2019

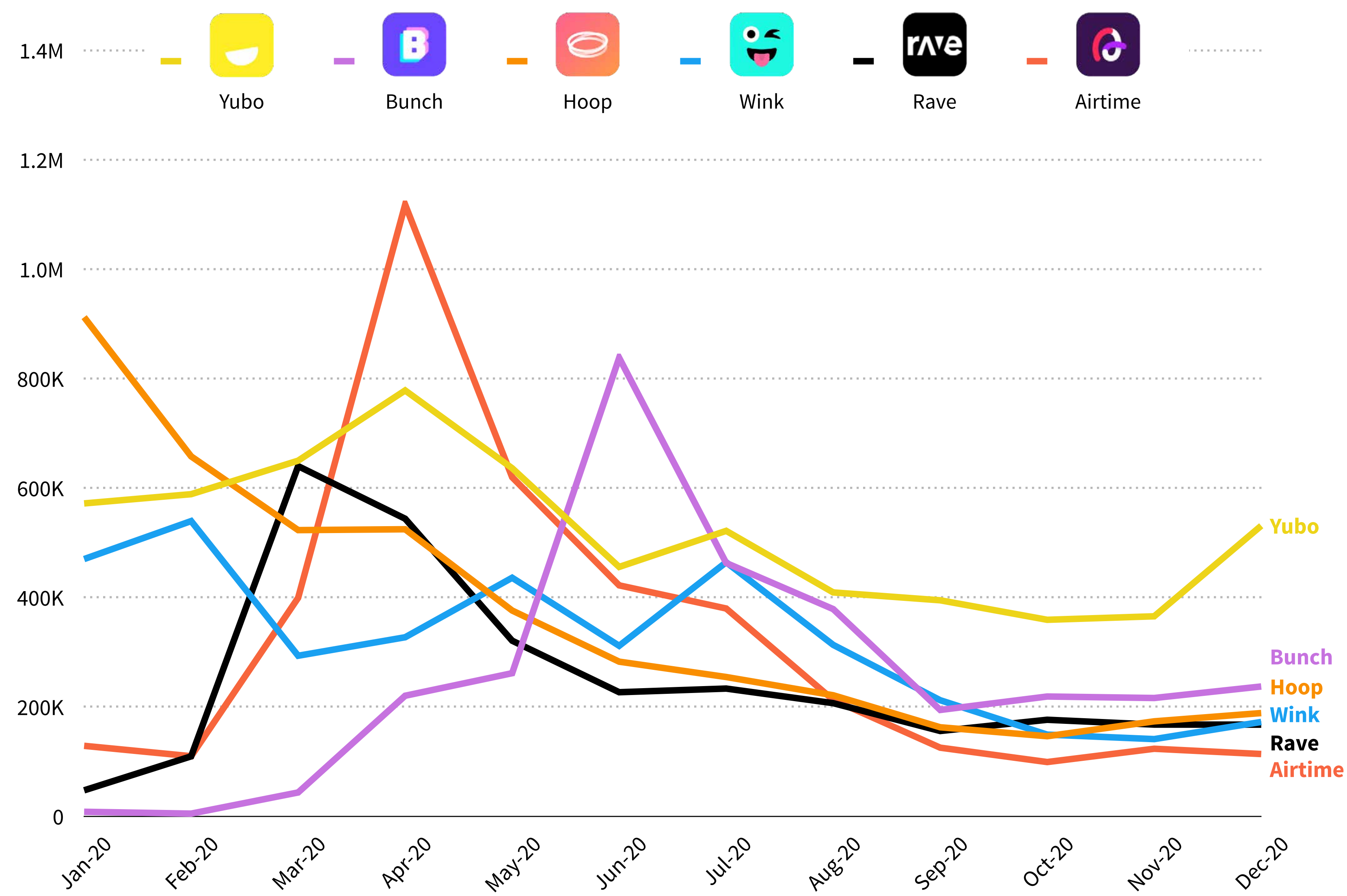


Many of the top emerging social apps in 2020 are meant for making new friends, including **Wink, Yubo, and Hoop**. Other top apps by year-over-year growth were for watching TV or playing games together over a video call.

Top growing social apps like Wink, Yubo, and Hoop had similar features to other social or dating apps, but were simply marketed for finding friends or socializing remotely during COVID-19. **Adapting quickly to demographic trends can give an app an advantage in such a competitive and ever-changing space.**

Yubo Pulled Away from Its Competitors in Late 2020

Monthly U.S. downloads for friend finding and group video apps

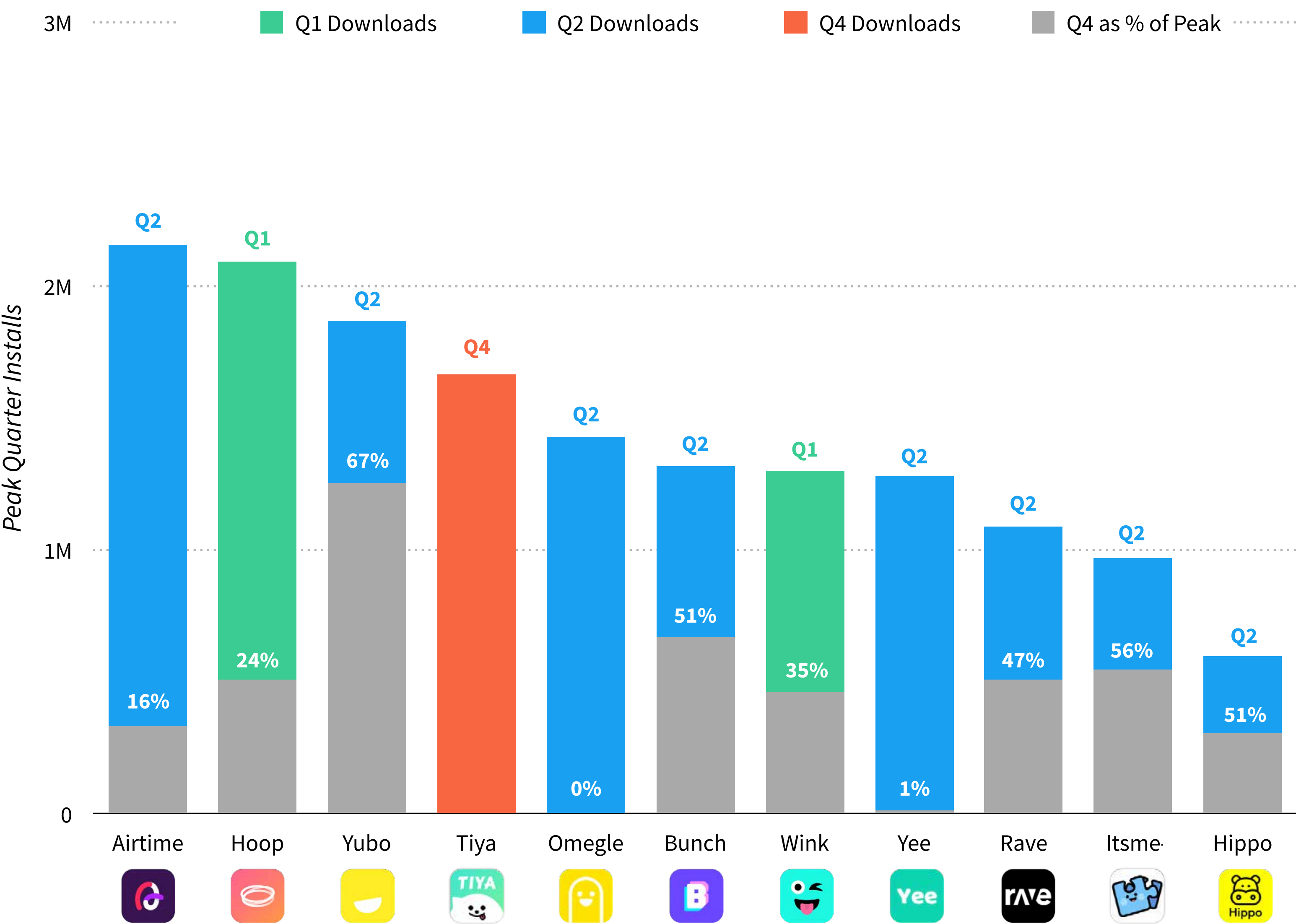


Apps for playing games or watching TV with friends saw large download surges in the first half of 2020, including Bunch, Rave, and Airtime. **With Yubo as a notable exception, downloads for each app fell back between 100 and 250K in December 2020.**

Yubo set itself apart from other top emerging social apps by maintaining higher monthly installs through the end of 2020. This **demonstrated the benefit of having a larger existing presence prior to 2020 compared to its competitors, as well as consistent advertising on ad networks like TikTok.**

Staying Power Is a Challenge for Emerging Social Apps

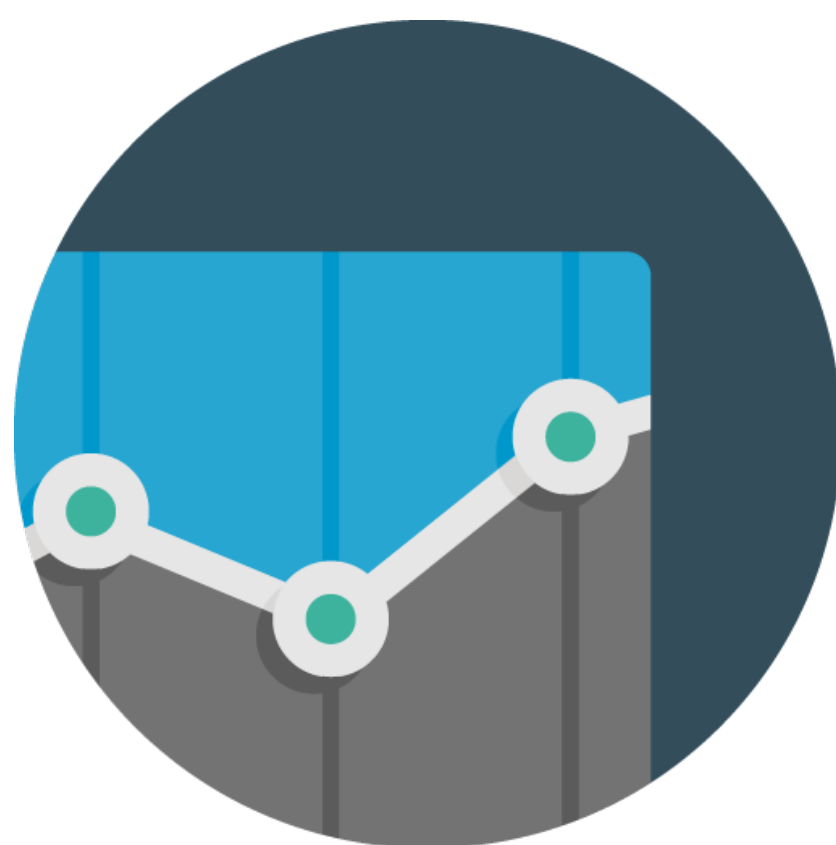
Top friend finding and group video apps by peak quarter relative to Q4 downloads in 2020



Nearly all of the top emerging social apps saw their downloads peak in the first half of 2020. Very few were able to sustain this level of success into Q4. Yubo was the only top friend finding / group video app to reach even two-thirds of its download peak in Q4.

Many social apps were able to attract over 1 million new users in 2020. Retaining this young user base will be the challenge throughout 2021 as the world begins to re-open.

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