



#### **About this report**

The 2015 U.S. Mobile App Report leverages several data sources unique to comScore:

- The report is based primarily on behavioral measurement from comScore Media Metrix® Multi-Platform, which provides deduplicated reporting of digital audiences across desktop computers, smartphones and tablets, and comScore Mobile Metrix®, which provides deduplicated reporting of mobile web and app audiences across both smartphones and tablets. The report also includes survey-based data from comScore MobiLens®.
- Custom analytics data derived from the aforementioned products' data streams is also included.
- The report also incorporates results from a survey of 1,084 smartphone users to understand their habits.

#### **Important Definitions:**

- Any reference to "mobile" means the combination of smartphone and tablet. When data is referring specifically smartphones or tablets, it will be labeled accordingly.
- All mobile data is based on Age 18+ population.
- A "unique visitor" is a person who visits an app or digital media property at least once over the course of a month. This metric, in app parlance, is equivalent to a "monthly active user/MAU". A "daily visitor" is similar to a "daily active user/DAU."

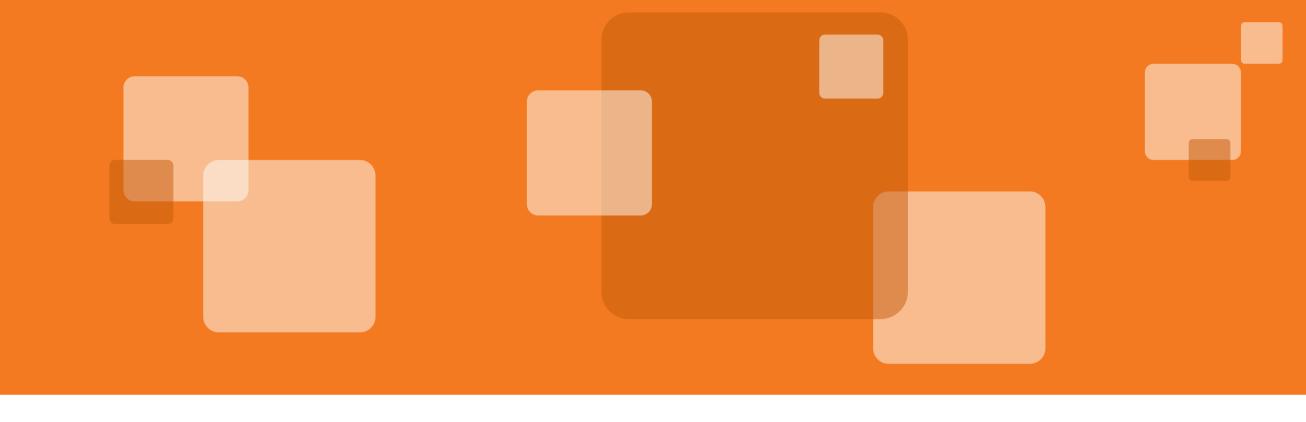
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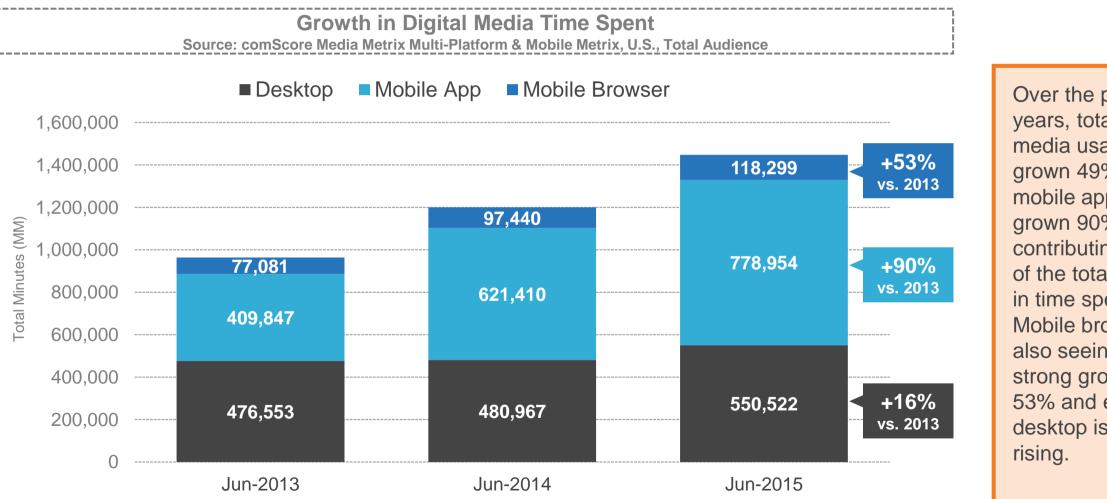




#### App Overview



#### Digital media usage time is exploding right now, and it's predominantly being driven by mobile apps.

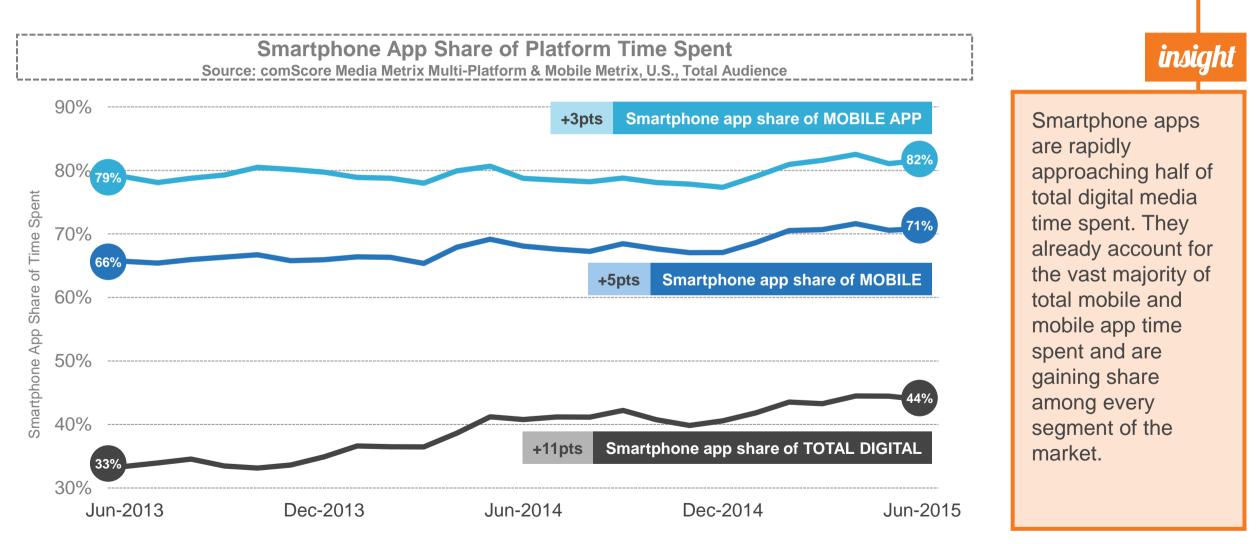




Over the past two years, total digital media usage has grown 49% with mobile apps having grown 90% and contributing to 77% of the total increase in time spent. Mobile browser is also seeing very strong growth at 53% and even desktop is still

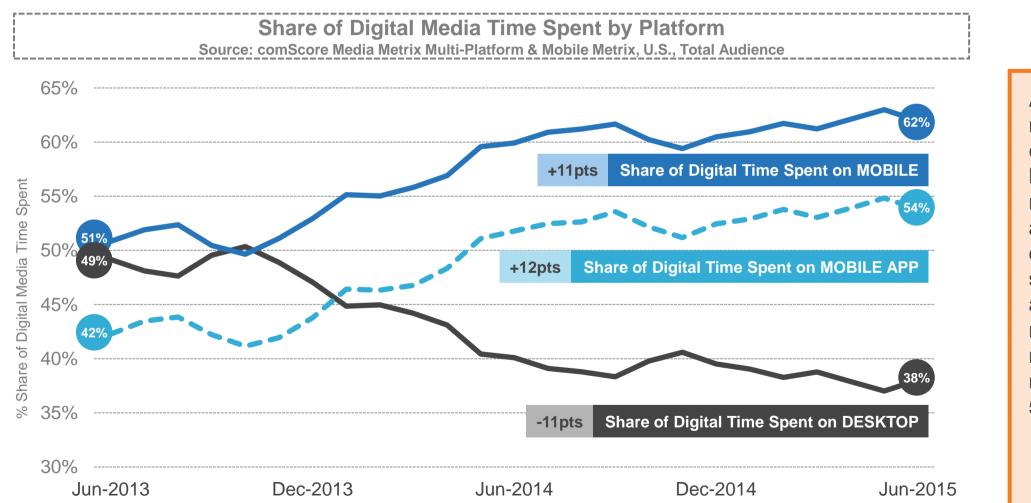


### Smartphone apps are eating up the digital universe and are now close to being a majority of all digital media time.





## Mobile now represents almost 2 out of 3 digital media minutes, and mobile apps alone now constitute a majority.

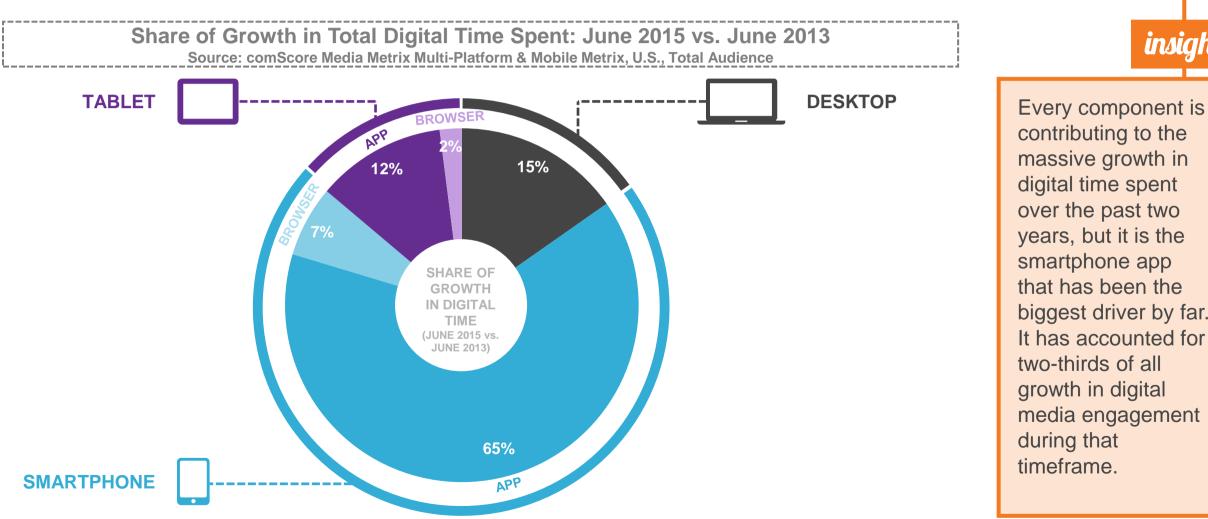




Although desktop is not declining in total engagement, it is losing share to mobile – which now accounts for 62% of digital media time spent. And mobile apps on their own now drive the majority of digital media time spent at 54%.



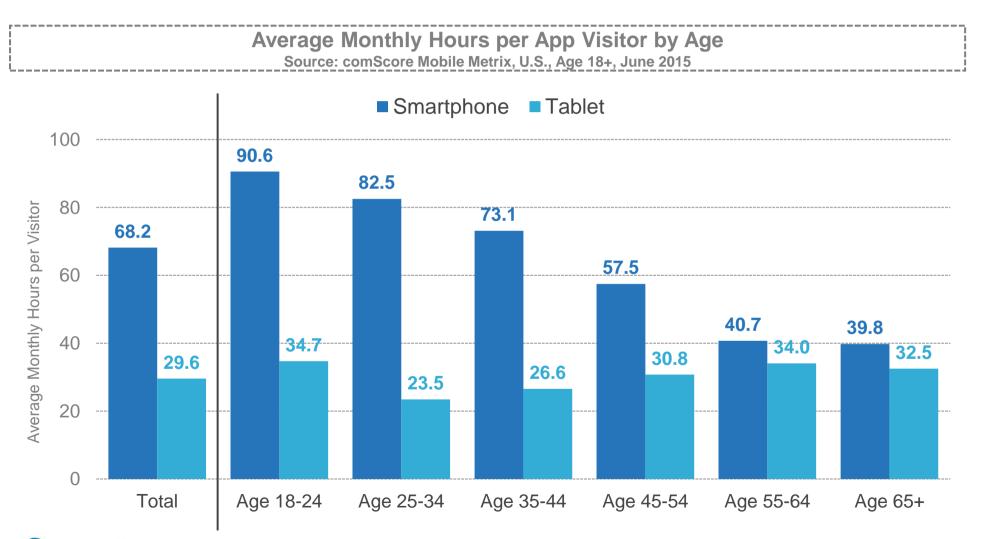
#### Smartphone apps have driven most of the growth in digital media usage in the past 2 years.



contributing to the massive growth in biggest driver by far. It has accounted for media engagement



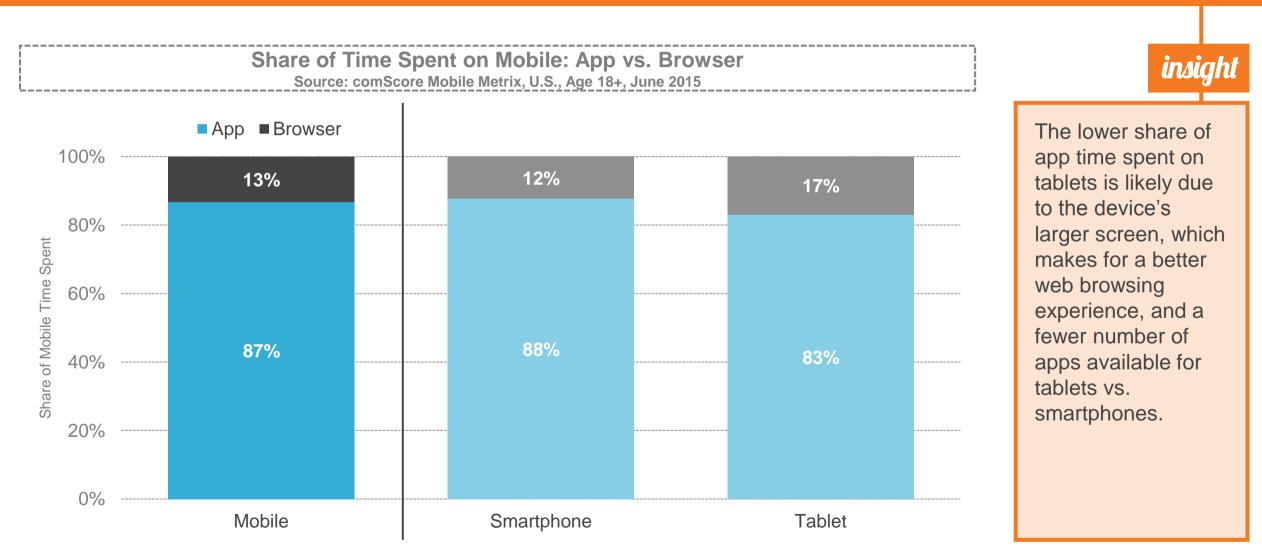
## App usage time is being driven heavily by Millennials on smartphones, while older segments skew on tablet apps.





Millennials spend an exorbitant amount of time on their smartphone apps, and usage declines with age. Tablet app engagement is much lower on average, but generally increases with age outside of the 18-24 year-old segment.

# Apps dominate mobile web in time spent. But these stats only tell part of the story, especially when looking at driving audiences...



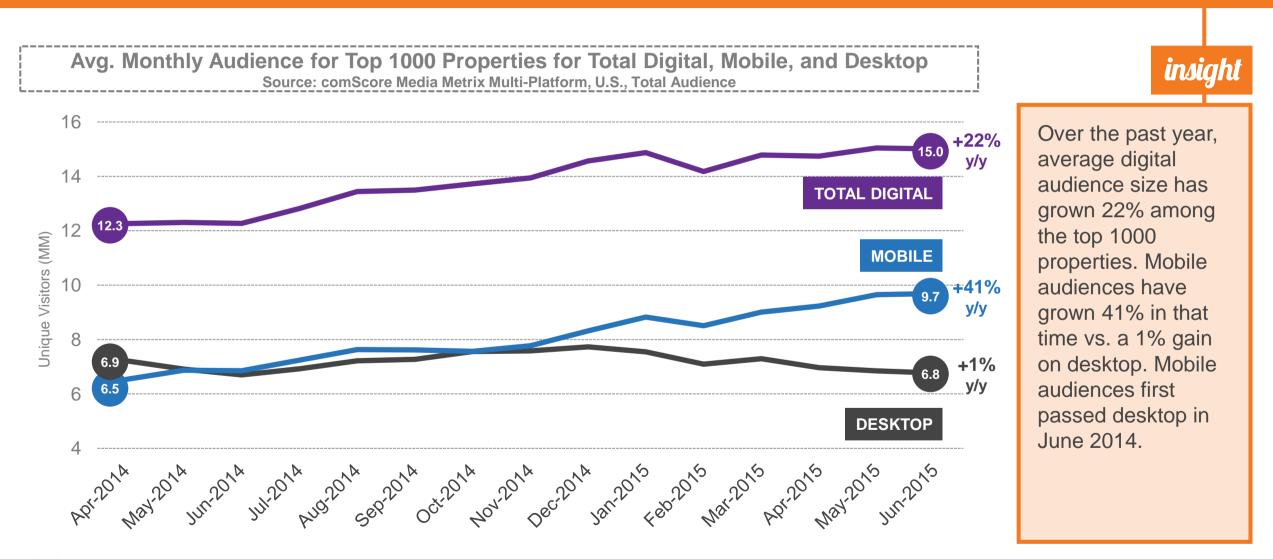




#### App Audiences

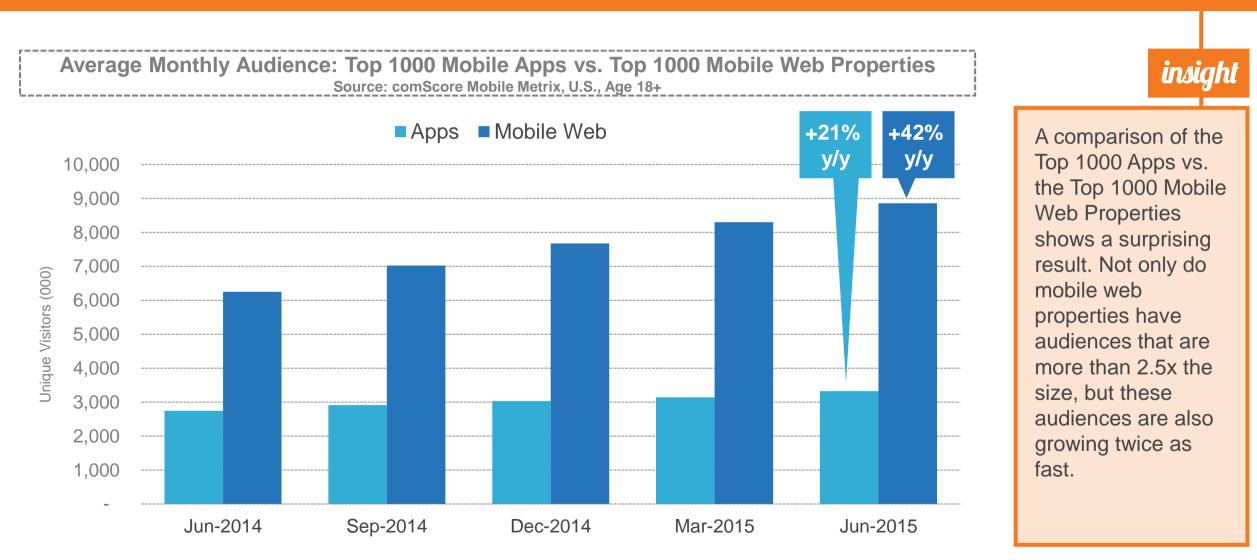


#### Multi-platform digital audiences are getting much bigger on average, and it's all because of mobile.



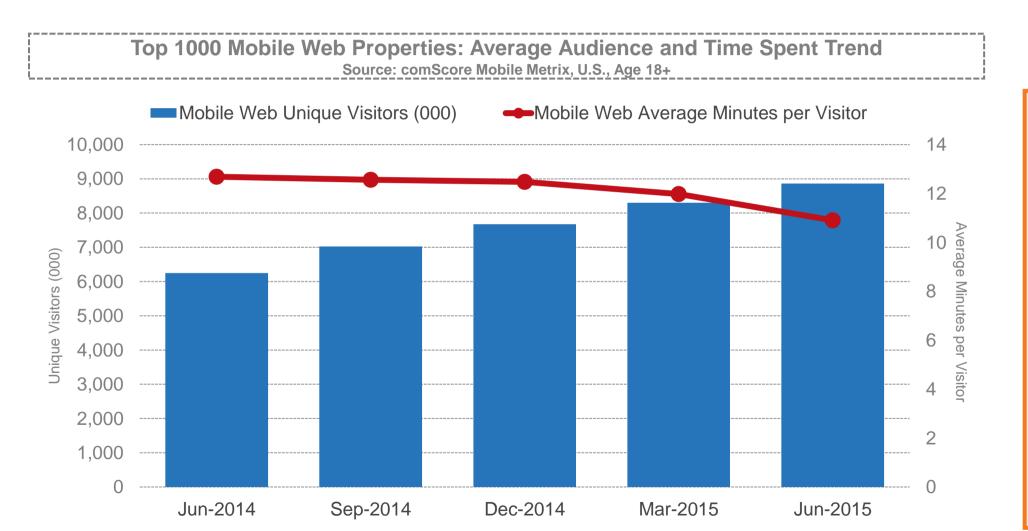


# And mobile audience growth is being driven more by mobile web properties, which are actually bigger and growing faster than apps.





## But mobile web audiences also tend to be a mile wide and an inch deep. As audiences increase, average time on mobile web declines.

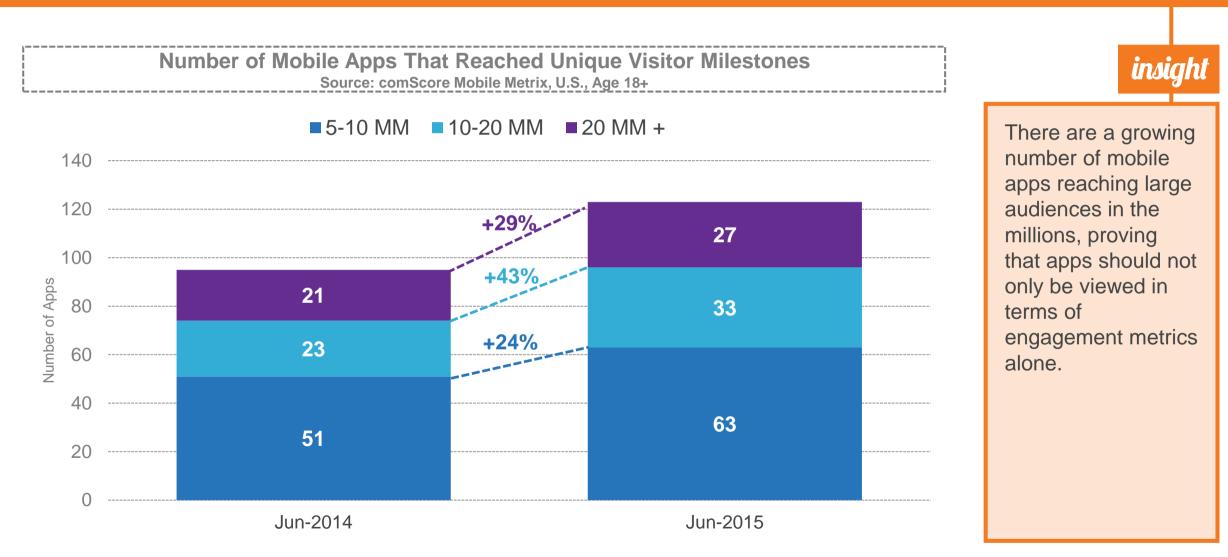




As average mobile web audiences climb. the depth of average engagement has steadily declined, suggesting an increase in drive-by traffic. While this traffic can help establish larger audience reach for mobile media properties, there may also be limits to the advertising opportunity it creates.



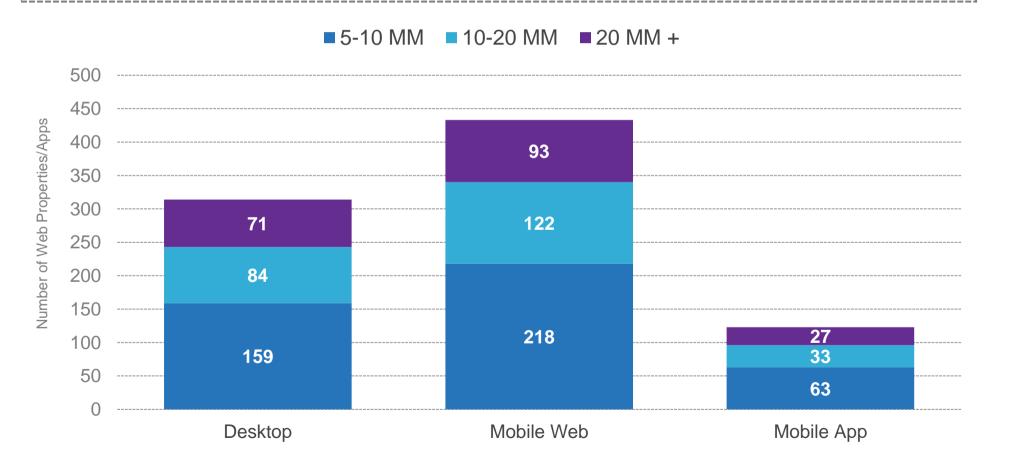
## Nevertheless, app audiences are growing. And the number of apps reaching 5/10/20 million monthly visitors has jumped.





#### But, it's still much easier to build a large audience on the desktop and mobile web because of more fluid linking of content.



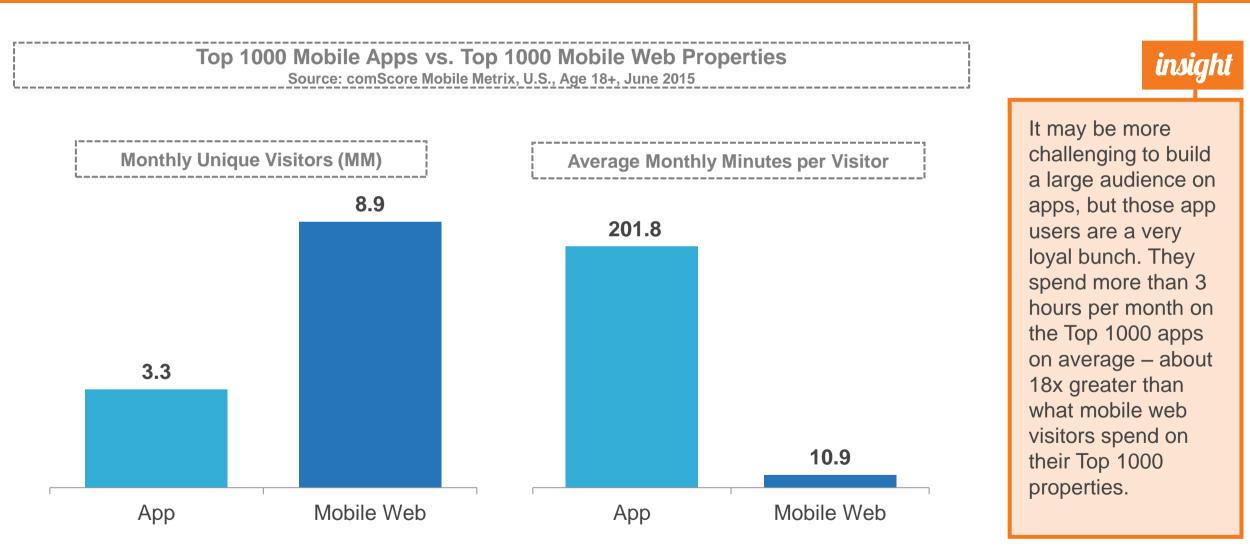




Despite growing audiences on apps, the existing digital infrastructure makes it harder to build large audiences on apps than on the web. As evidenced, the mobile web still has 3.5x more web properties with 5 million unique visitors than apps have.



# Establishing app audiences is harder, but their real value is in their loyalty. They spend 18x more time on apps than mobile web visitors.



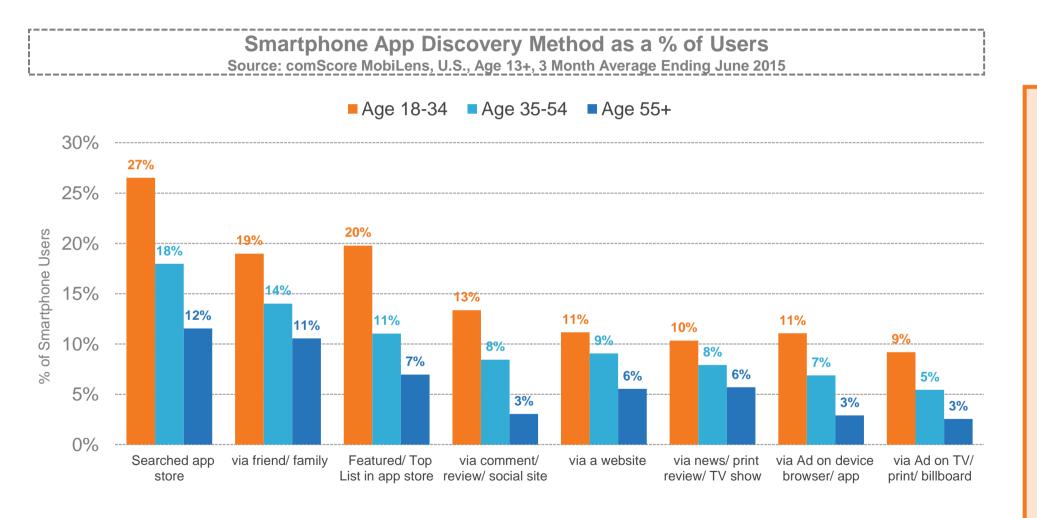




#### App User Habits



## Smartphone users rely most on the app store for app discovery, and more Millennials seek out apps across all methods of discovery.





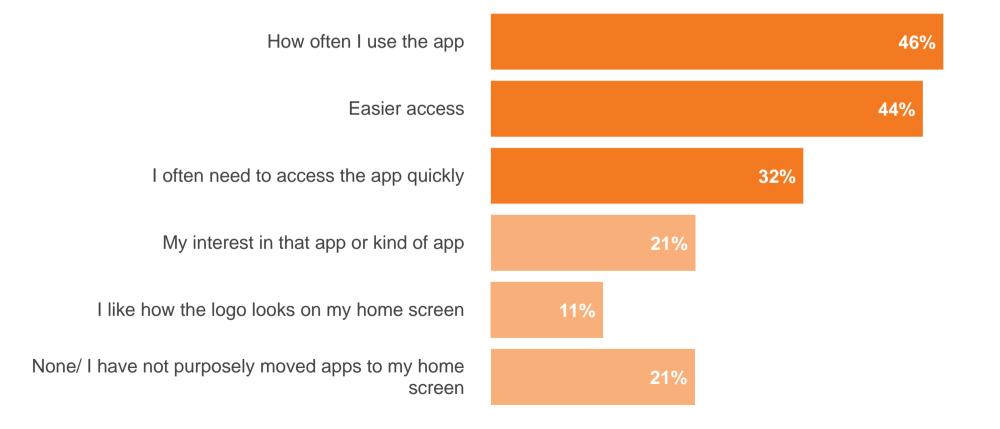
Since Millennials are heavier app users, it makes sense that they also would be more inclined to go out and discover new apps from a variety of methods. This age group is a great target for app advertising, and are likely a big driver of the growth in app install ads.



# Smartphone home screen real estate is scarce, and frequency of usage determines which apps get promoted to this screen.

Q: Which factors, if any, influence your decision to move any of your apps to your home screen?

Source: comScore Custom Survey, U.S., Age 18+, August 2015





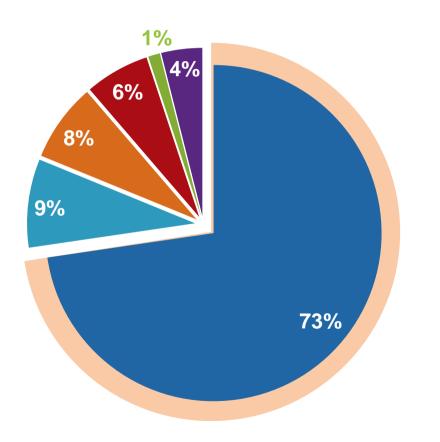
The desire to access certain apps easily and rapidly are other key drivers in determining which apps get placed on the home screen. Only 1 out of 5 smartphone users made no effort to customize which apps appear on their home screen.



## 3 in 4 smartphone users keep their most used app on the home screen and fully in view, outside the confines of an app folder.

#### Q: Where is the mobile app you use most often located?

Source: comScore Custom Survey, U.S., Age 18+, August 2015



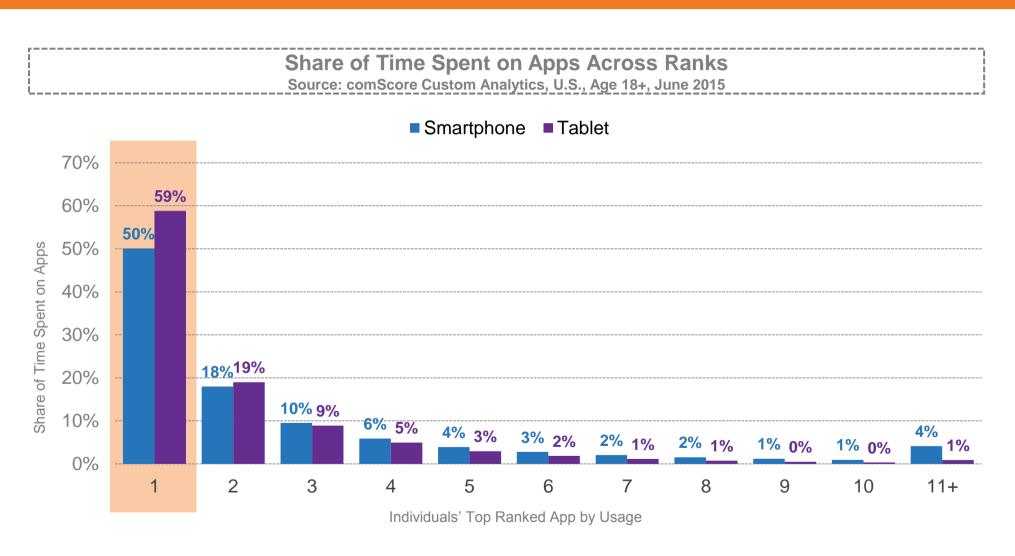
- Home Screen Individual App
- Secondary Screen Individual App
- Menu of All Mobile Apps
- Home Screen In Folder
- Secondary Screen In Folder
- Other



Nearly 3 out of every 4 smartphone users prefer to keep their most frequently used app in the location with the least amount of friction on their phone – one click away on their home screen. About 1 in 10 keep their most used app outside a folder on a secondary screen.



#### Half of all time spent on smartphone apps occurs on the individual's single most used app. And it's almost 60% on tablets.

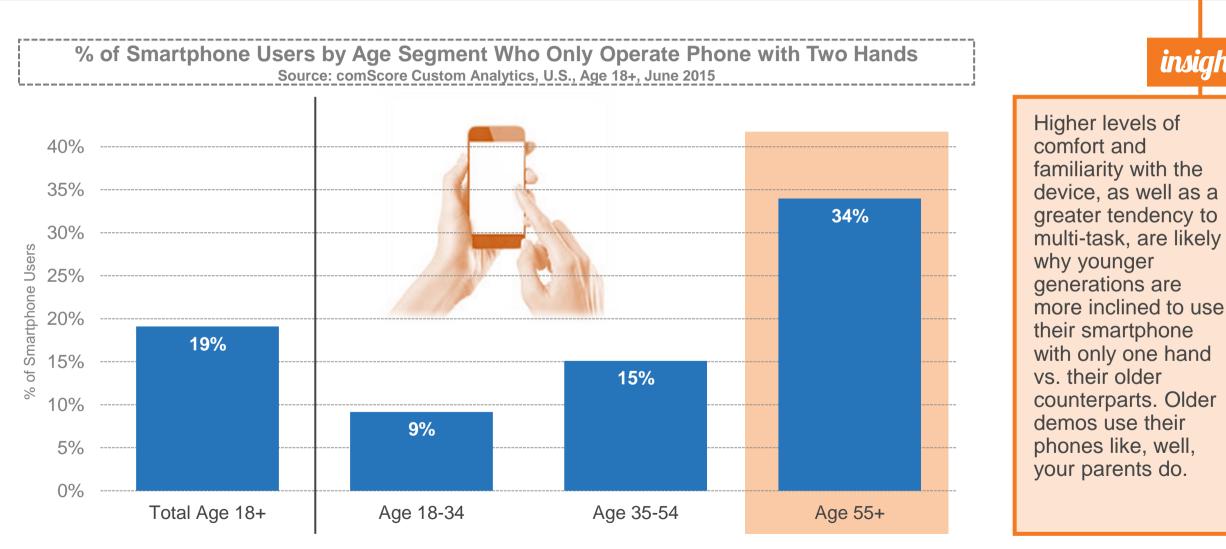




Nearly 4 out of 5 smartphone app minutes are spent on the individual's Top 3 apps, despite the average smartphone user visiting 25 apps per month. Tablet users are even more engaged with their top apps, with 87% of their app usage occurring on their Top 3.



## Your Dad's not the only one who operates his smartphone with two hands – it's a generational thing.

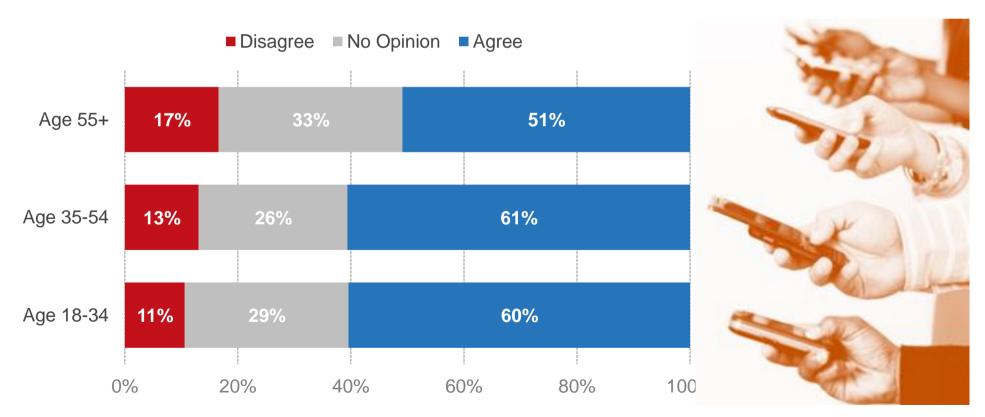




#### One-handed smartphone users consciously decide on where apps are positioned on their phones based on "thumb reach."

Q: Agree/Disagree: The ease with which I'm able to reach an app with my thumb when operating my phone affects where I have positioned that app on my smartphone?\*

Source: comScore Custom Survey, U.S., Age 18+, August 2015



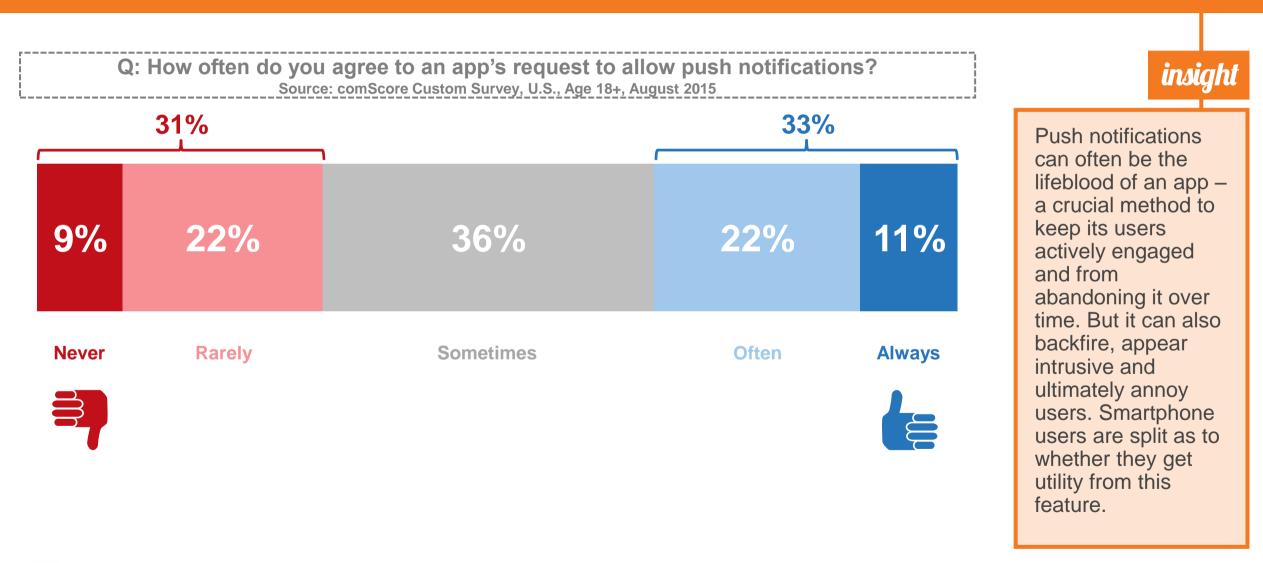
insight

The majority of onehanded smartphone users of all ages consider thumb reach when positioning apps on their phone. Those age 55+ are somewhat less likely to practice this behavior, but overall it appears that thumb reach is an important consideration across all age groups.



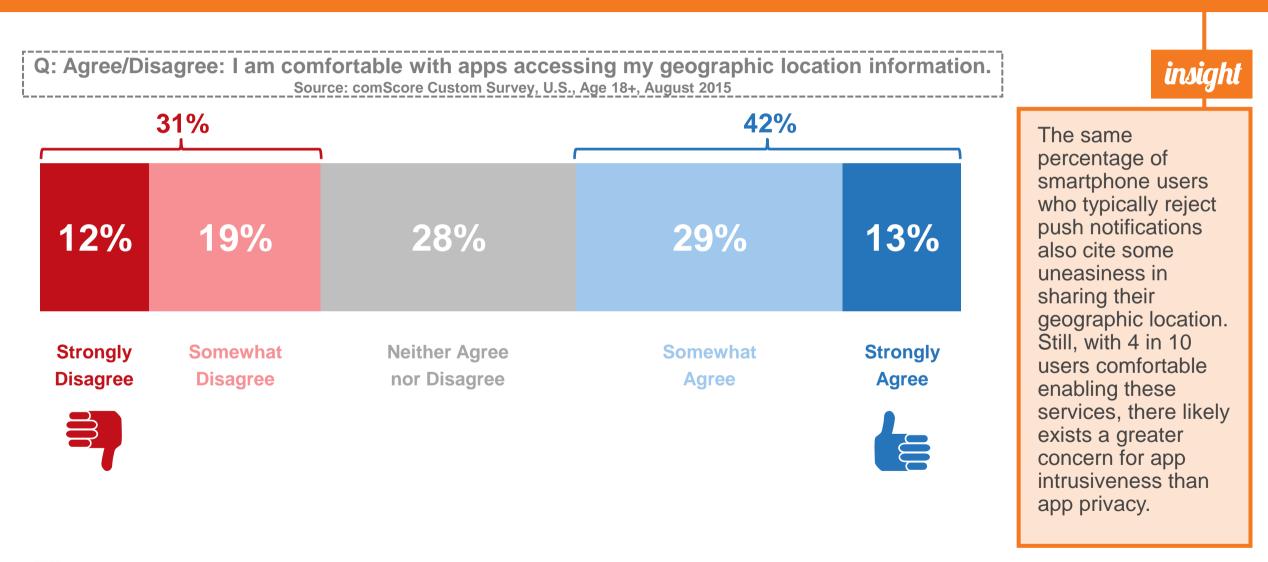
<sup>\*</sup> One-handed smartphone users who responded that they "Strongly Agree" or "Somewhat Agree" with the above statement were combined into a single group labeled "Agree." Similarly, the "Disagree" group of respondents consists of one-handed smartphone users who stated that they "Strongly Disagree" or "Somewhat Disagree."

# Smartphone users are as likely to accept push notifications as reject, indicating a need to balance utility with intrusiveness.





# Smartphone users are *more* comfortable sharing location info than receiving notifications. Privacy less of a concern than annoyance?







## Top & Fast-Growing Apps

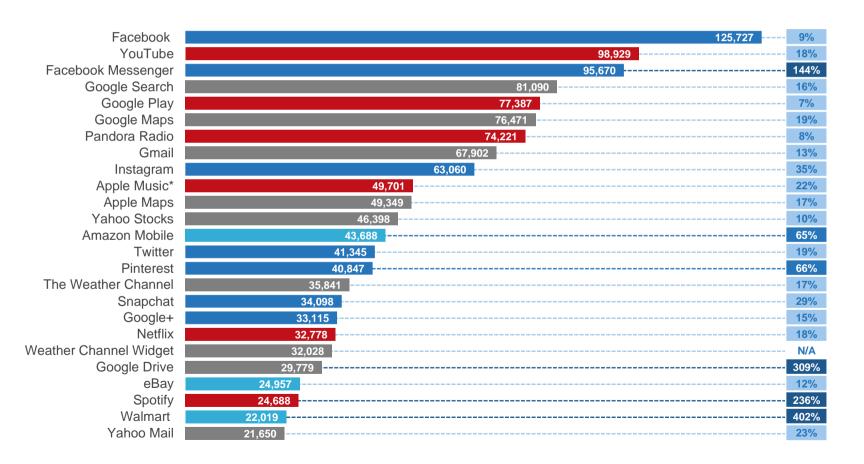


# The list of Top 25 mobile apps is dominated by the leading digital media companies and tends to concentrate within a few categories.

#### Top 25 Mobile Apps by Unique Visitors with Y/Y Growth

Source: comScore Mobile Metrix, U.S., Age 18+, June 2015 / June 2014





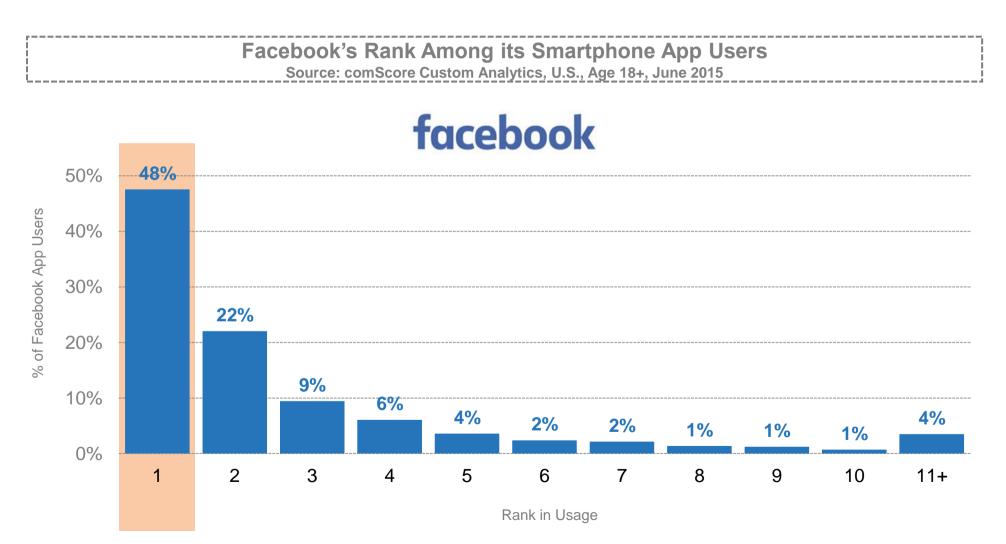


The Top 6 – and 8 of the Top 9 – apps are owned by Facebook or Google. The Top 25 apps can all be broadly classified as either Utilities (9), Social (7), Entertainment (6), or Retail (3), highlighting some of the most critical needs that apps fulfill.



<sup>\* &</sup>quot;Apple Music," as it appears above, is the same measured entity as the previously named "iTunes Radio/iCloud." This entity, now under the new name, is referring to Apple's native music app, which captures all music activity within that app, including listening via the streaming service, radio service and users' personally downloaded music libraries.

## Facebook ranks as the #1 smartphone app by total time spent for almost half its user base – an astounding number.



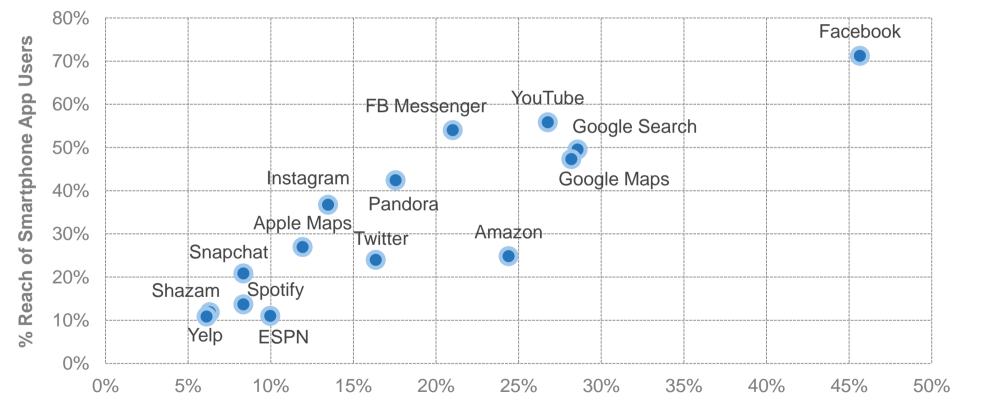


Facebook continues its impressive reign as the #1 app overall in both users and engagement, and it's in the Top 3 for nearly 80% of users. With constantly refreshing social content and home screen accessibility for most users, the app is made for habitual usage.



#### Location, location, location. Apps occupying valuable home screen real estate tend to have the most visitors.





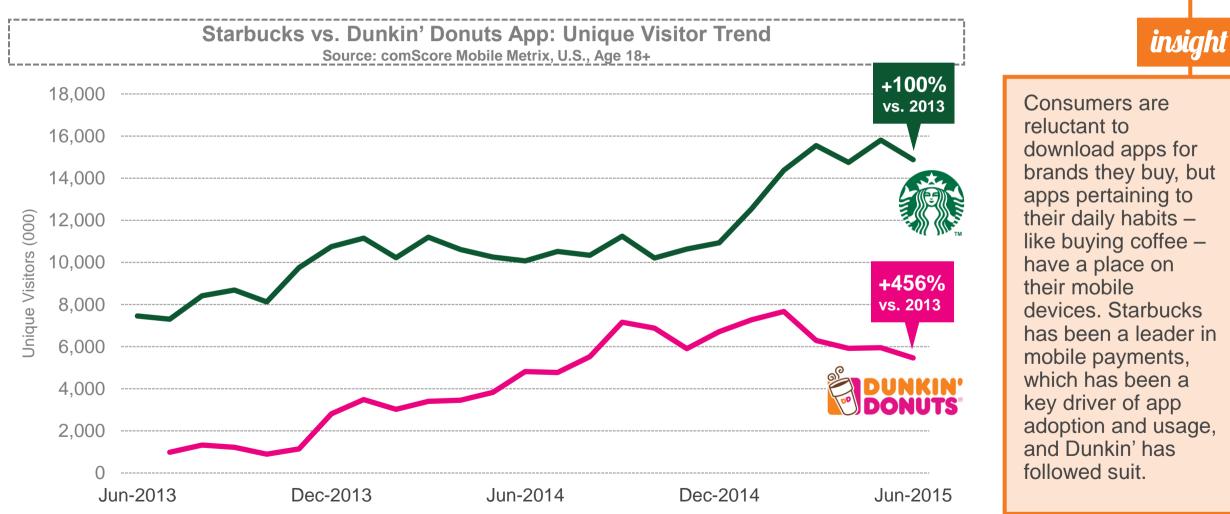
% of Home Screens on Which App Appears



Apps with easy access and visibility on the home screen unsurprisingly attract more visitors than apps that rarely obtain home screen real estate. Of course, apps that are most often selected for the home screen tend to generally be more popular, creating a chickenand-egg phenomenon.



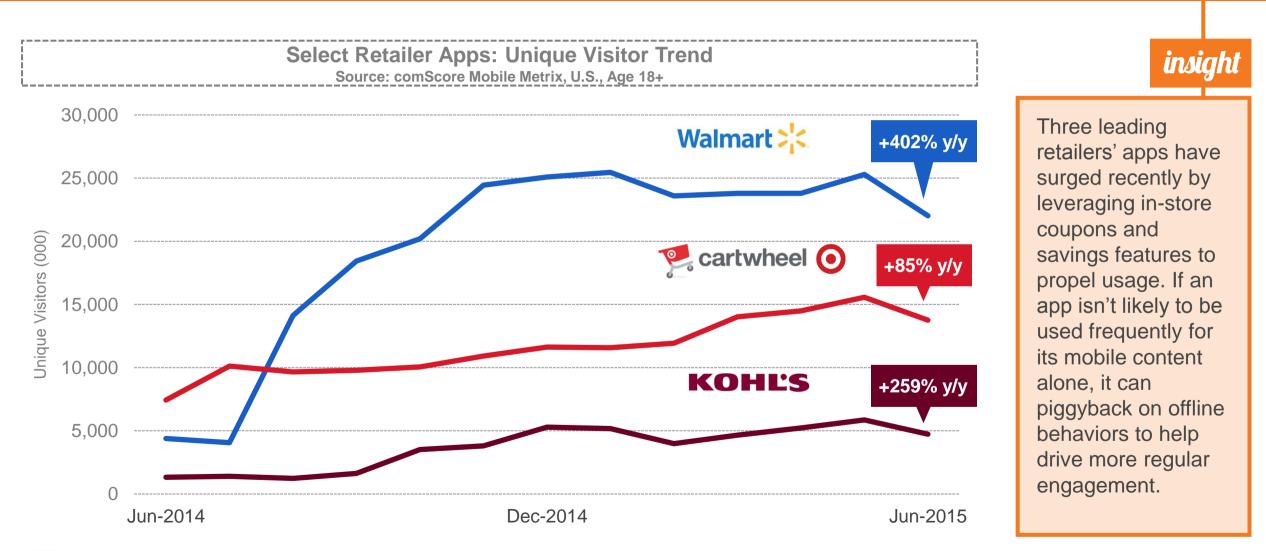
#### Habits can be powerful drivers of app usage, particularly when daily behaviors are involved. Like getting your caffeine fix.





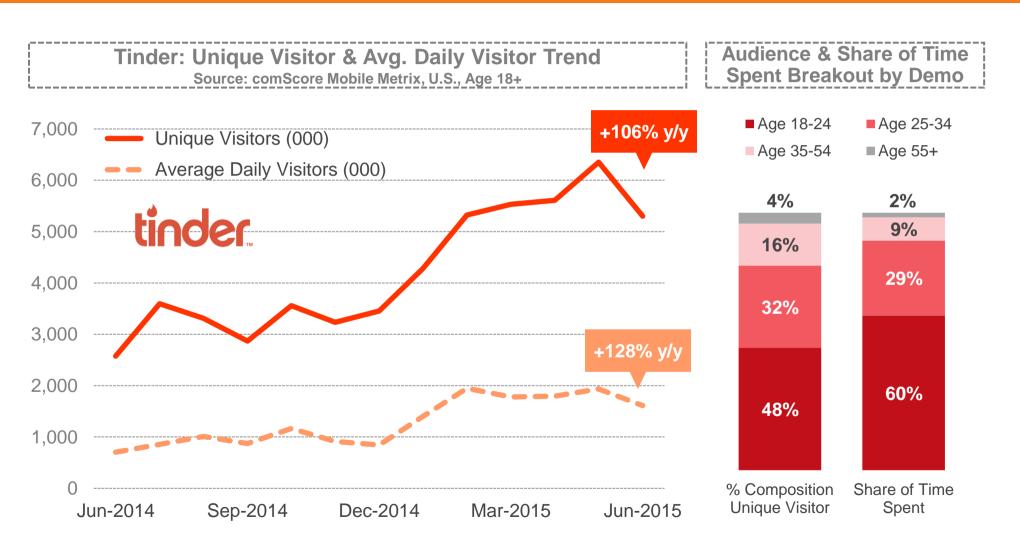


## Some leading retailers have experienced recent app success by leveraging their customers' routines of visiting their stores.





# Tinder, whose 2x growth in the past year is dominated by Millennials – particularly college kids – is transforming the dating landscape.

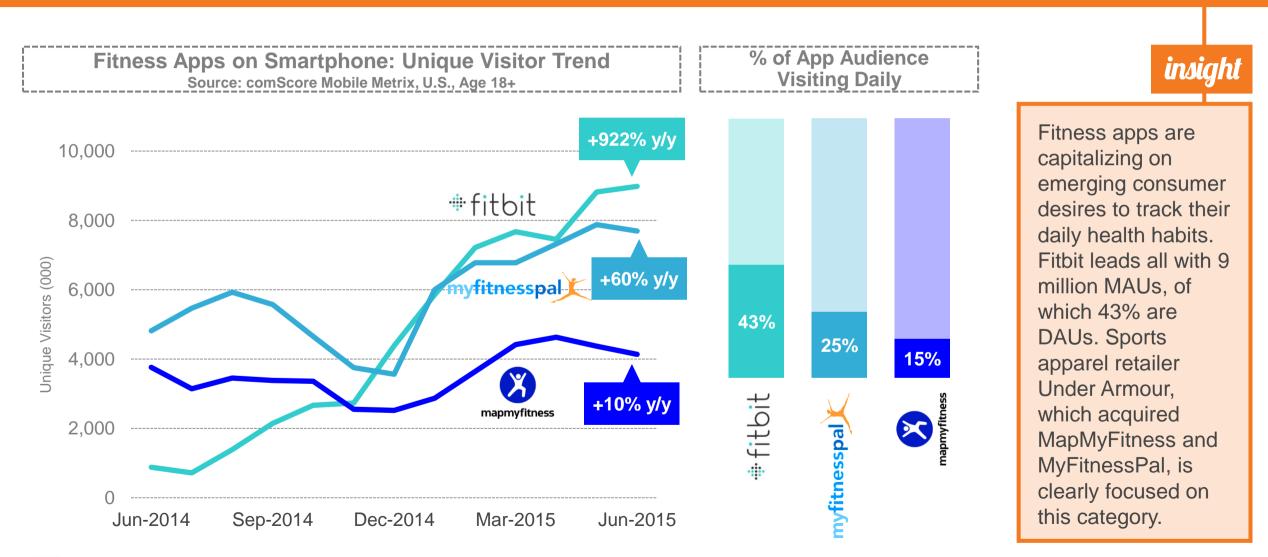




Tinder's popularity among Millennials is impressive, as 4 out of 5 users on the dating app are 18-34 years old, and nearly half its users are 18-24 years old. This youngest 18-24 segment is also the most engaged, spending 3.5 hours on the app per month, accounting for 60% of Tinder's total time spent.

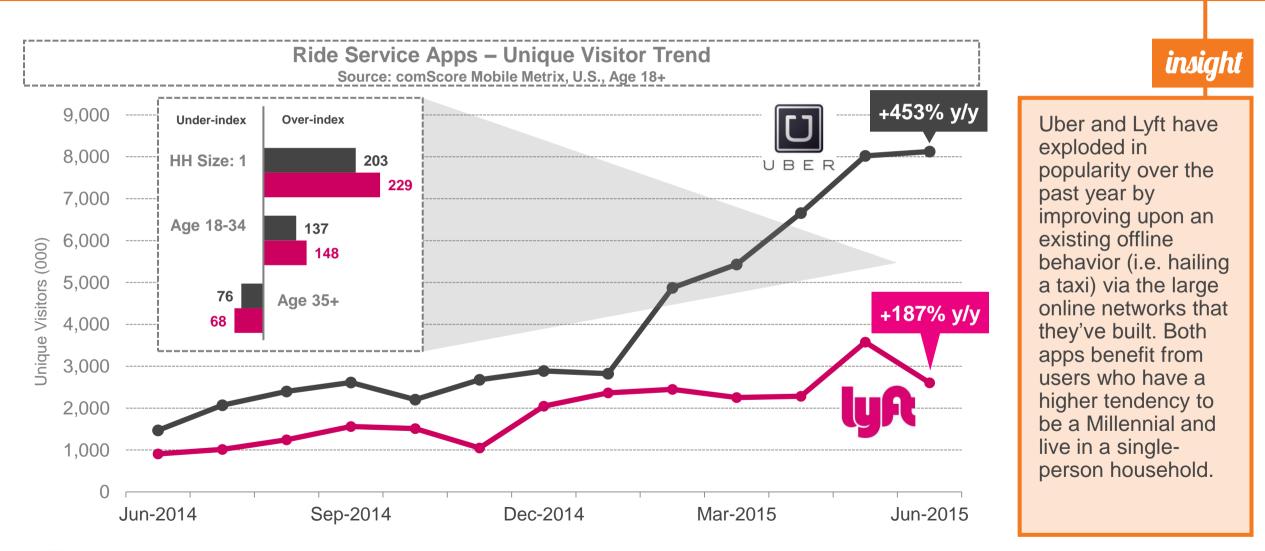


#### Fitness is another daily habit for many Americans, and several apps have seen big growth with their personal health tracking features.





## Accessing on-demand services has also become habitual for many people, and Uber & Lyft lead the way for on-demand transportation.







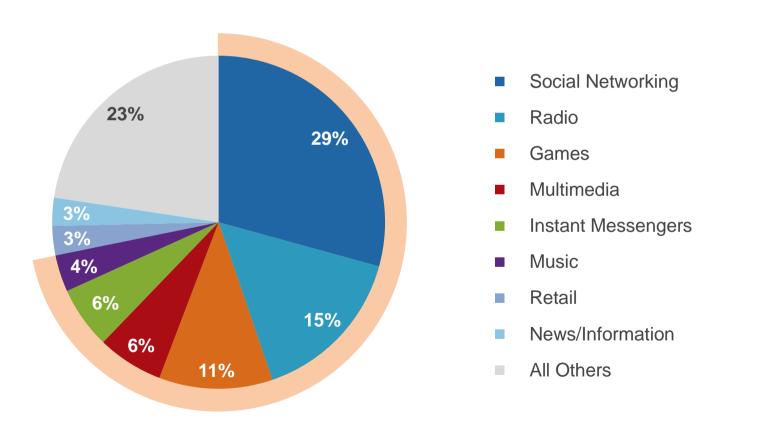
#### Content Categories



#### Social media and entertainment account for the six top app categories and drive two-thirds of total time spent on apps.

#### **Share of Mobile App Time Spent**

Source: comScore Media Metrix MP and Mobile Metrix, U.S., Total Audience, June 2015





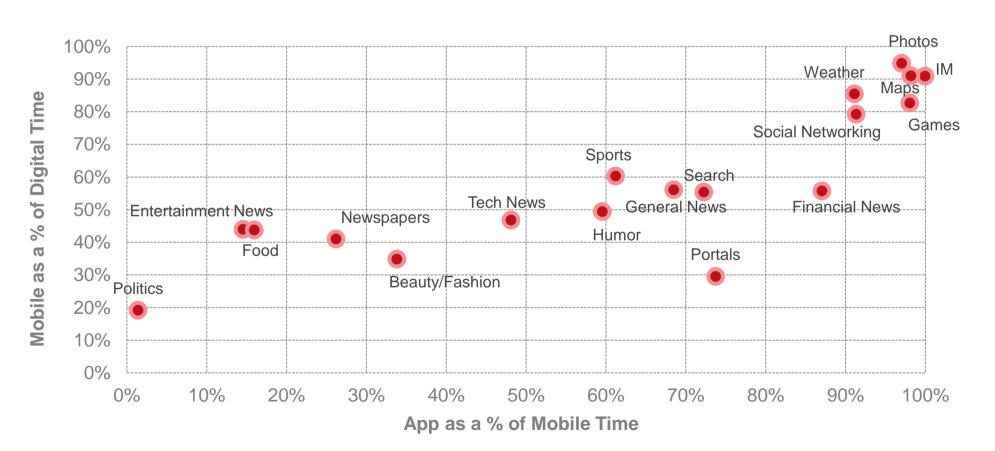
Social Networking, Radio and Games contribute more than half of total time spent on mobile apps. The strength of the top categories highlights that mobile devices are more heavily used for entertainment and communication than their desktop counterparts.



## Mobile usage lives and dies by the success of apps. Categories with strong app usage are more likely to shift from desktop to mobile.



Source: comScore Media Metrix MP and Mobile Metrix, U.S., Total Audience, June 2015



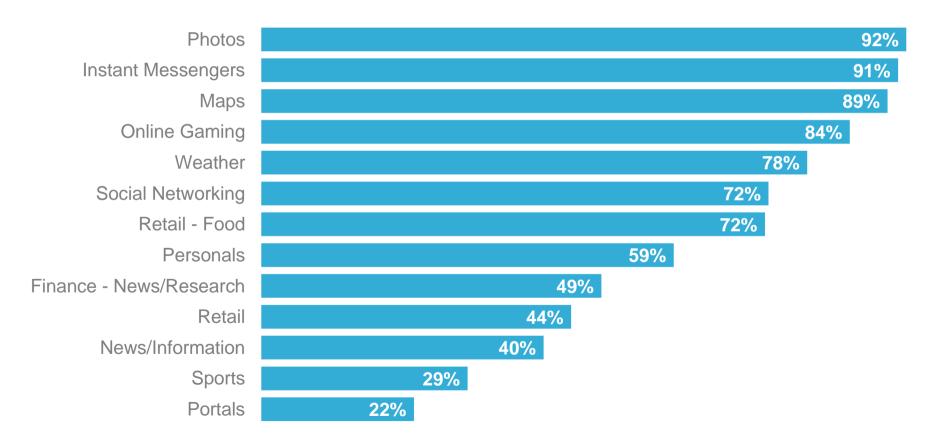


Categories with high engagement on apps as a percentage of all mobile activity also tend to see mobile as a higher percentage of all digital activity. It appears that without strong apps, categories are not navigating overall transition to mobile as effectively.



# Certain content categories' usage is now driven almost exclusively by apps, with Photos and Instant Messengers leading the way.



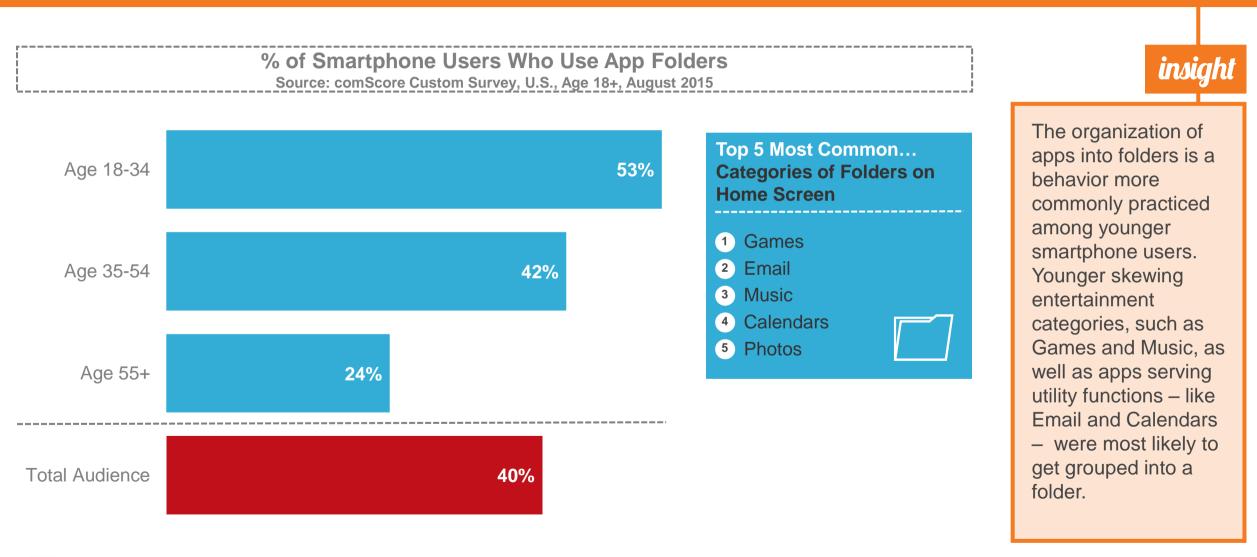




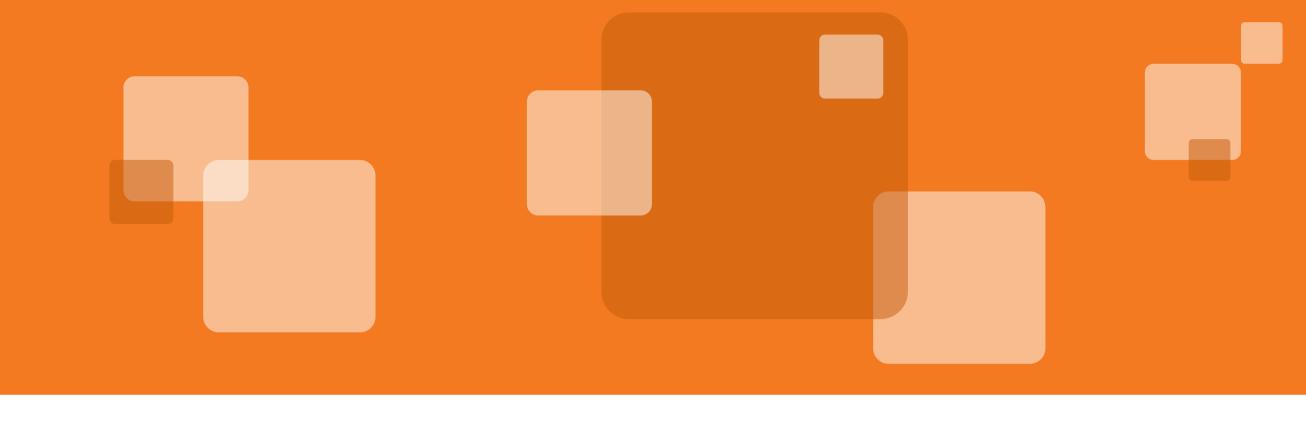
Mobile Apps dominate total time spent for social and communication categories, and for on-the-go utilities like Maps and Weather. Categories like **News and Sports** are somewhat less reliant on apps, both because they skew towards desktop and have substantial mobile web usage.



# Younger smartphone users are significantly more likely to use folders to organize their apps into categories.



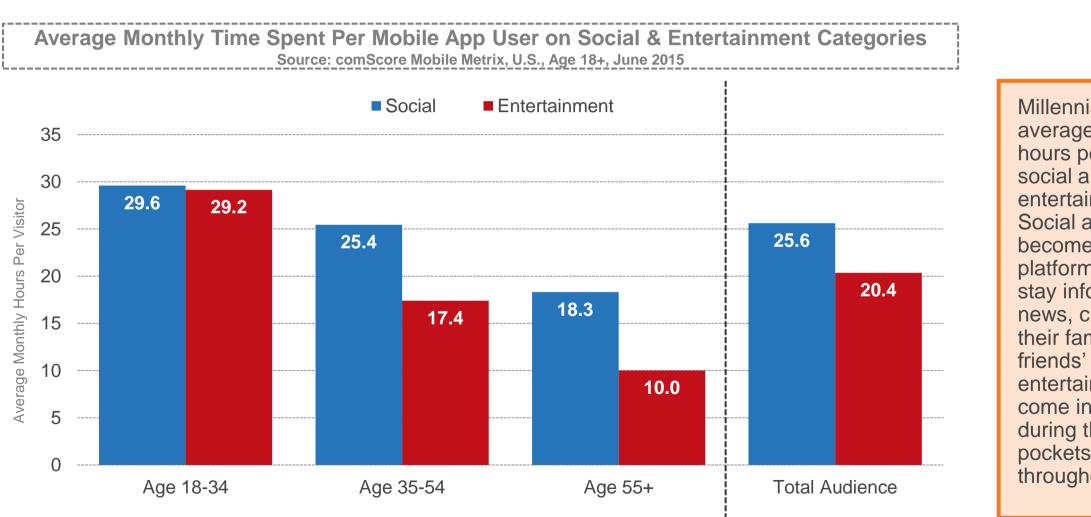




#### Social Media & Entertainment Apps



## The average mobile user spends a whopping 26 hours per month on social apps. For Millennials, it's 16% higher than the total audience.

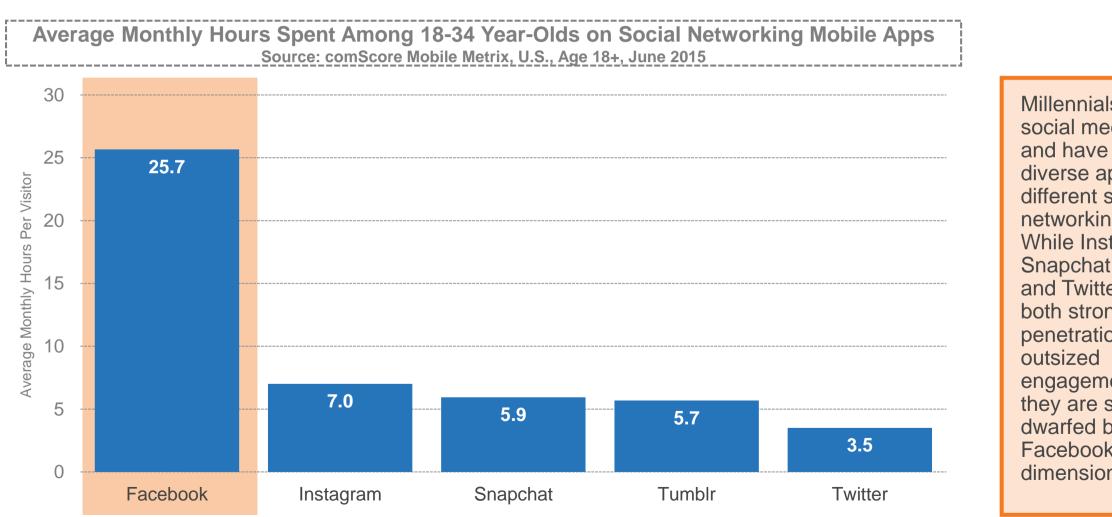




Millennials spend an average of two hours per day on social and entertainment apps. Social apps have become the primary platform for users to stay informed on news, culture, and their family and friends' lives. While entertainment apps come in handy during those pockets of free time throughout the day.



## Facebook still wins the battle for the app attention of Millennials but other social platforms also drive very high engagement.





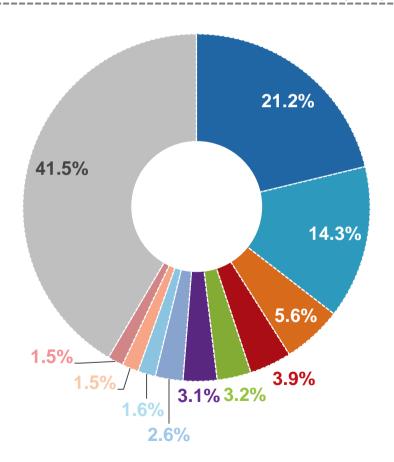
Millennials are social media junkies and have shown a diverse appetite on different social networking apps. While Instagram, Snapchat, Tumblr and Twitter all boast both strong penetration and engagement stats, they are still dwarfed by Facebook on both dimensions.



#### Millennials' app usage time is dominated by social, video, music and communications.

#### Millennials' Top Apps by Share of Total Mobile App Time Spent

Source: comScore Mobile Metrix, U.S., Age 18+, June 2015



- Facebook
- Pandora Radio
- YouTube
- Instagram
- Spotify
- Facebook Messenger
- Snapchat
- SoundCloud
- Netflix
- Google Search
- All Other



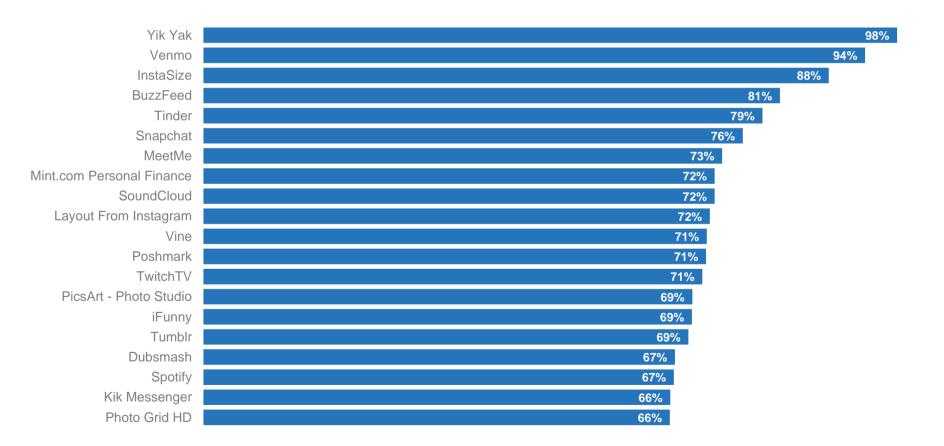
More than half of Millennials' app engagement occurs in their Top 6 apps, and every single app in their Top 10 is a social or entertainment app, with the exception of the ever-present Google Search. YouTube, Instagram and Snapchat are all notable for capturing relatively bigger slices of the Millennial pie.



#### The vast majority of the apps skewing most heavily toward Millennials are social in nature.



Source: comScore Mobile Metrix, U.S., Age 18+, June 2015

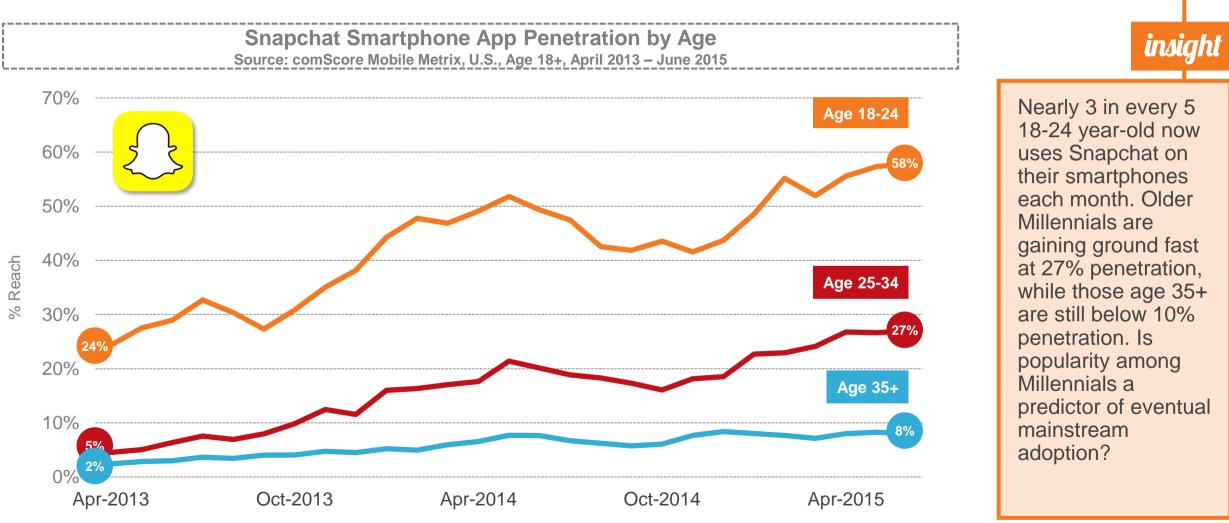




The list of
Millennial-heavy
apps is very telling,
with the vast
majority being
related to social,
chat, and music.
Several social
personalization
apps also indicate
their affinity for
creative expression
and enhanced
communications.



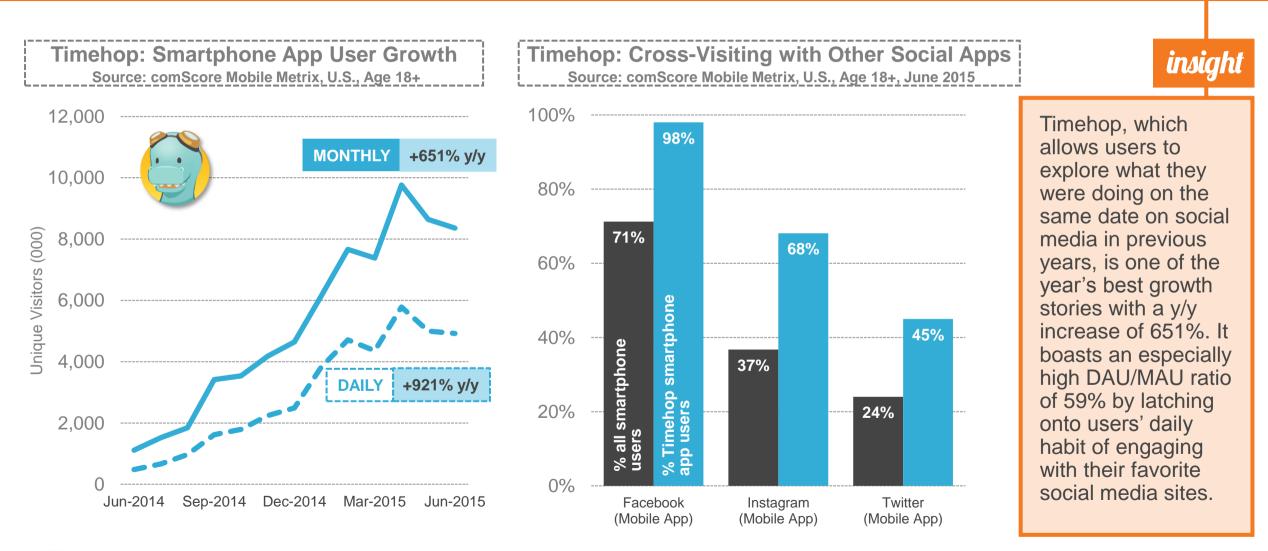
#### A strong majority of college kids use Snapchat every month, and the popular app is picking up traction among older Millennials, too.





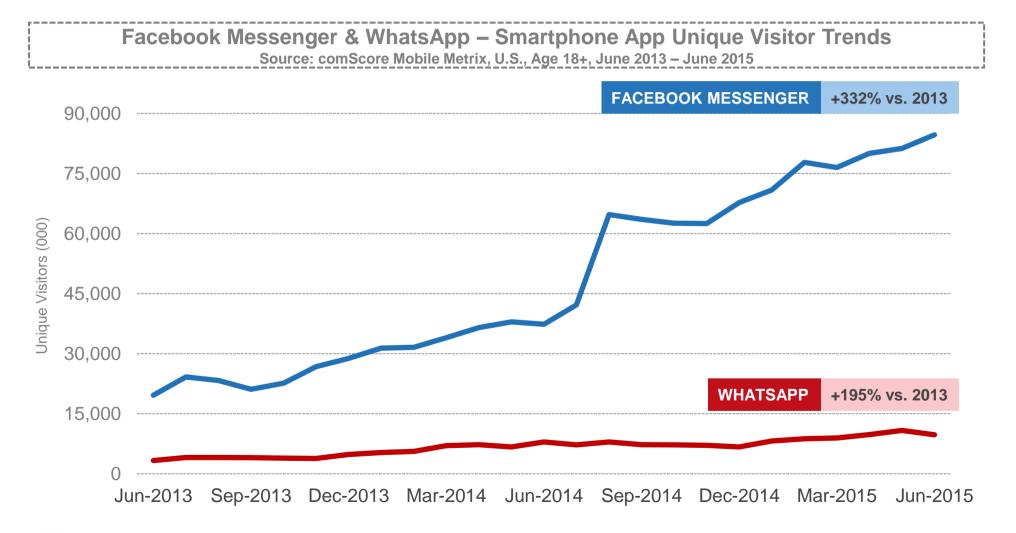


# Timehop has recently asserted itself as one of the fastest-growing and most oft-used apps with a majority of users accessing daily.





# Facebook's unbundling of FB Messenger has helped drive massive growth and kick-started the emergence of messaging in the U.S.

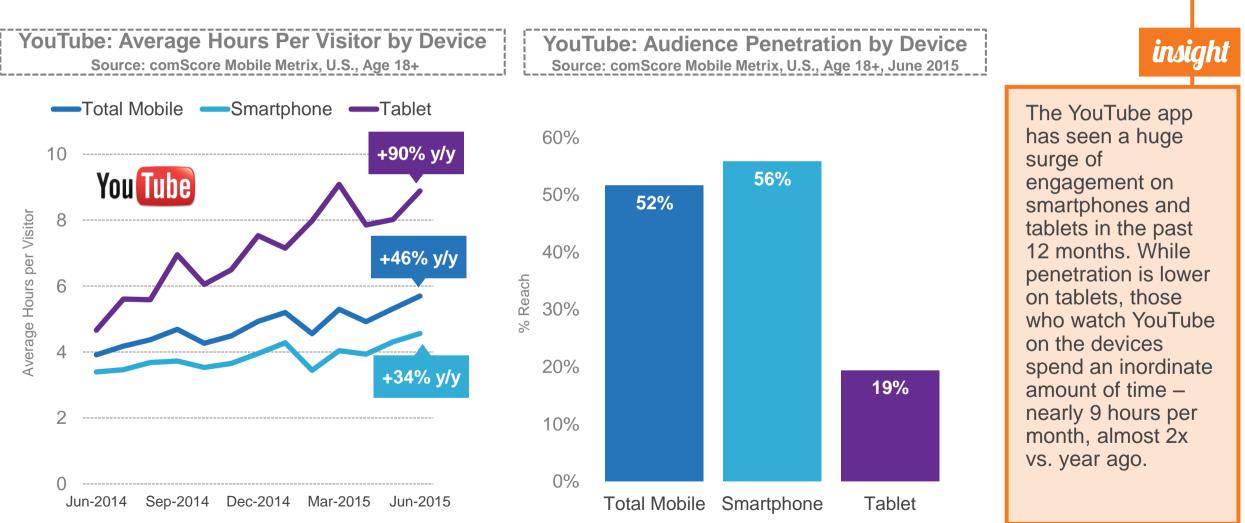




Messaging is a very hot sector of apps, but is much more prevalent internationally right now. Facebook Messenger has seen huge growth as it unbundled from the flagship app, while FB's other messaging service WhatsApp is also on the rise. But this market still feels relatively early stage in the U.S.

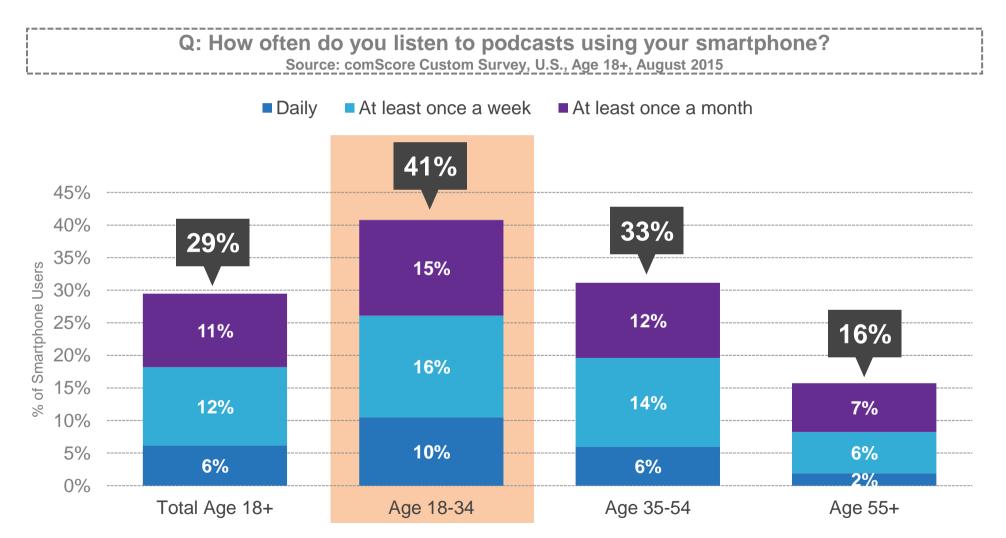


## The YouTube mobile app's explosion in engagement on smartphones and tablets highlights the rapid shift to mobile video.





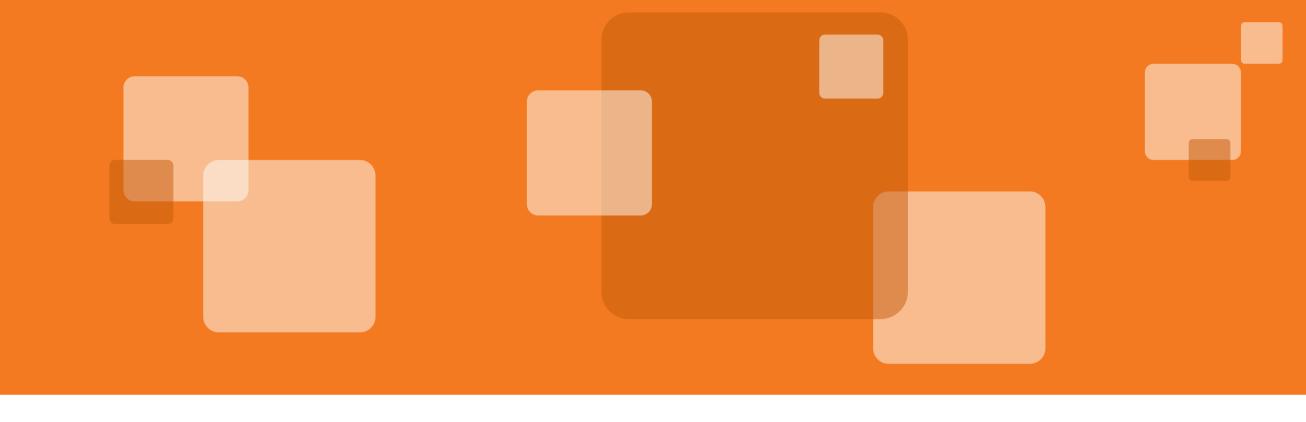
## Podcasting looks poised for lift-off as more than 4 in 10 Millennials now listen on smartphone apps at least once a month.





While podcasting has been around for more than a decade, it seems to have finally found a market. The popularity of new content combined with the power of the smartphone app has helped it gain traction from a growing number of users, particularly Millennials.





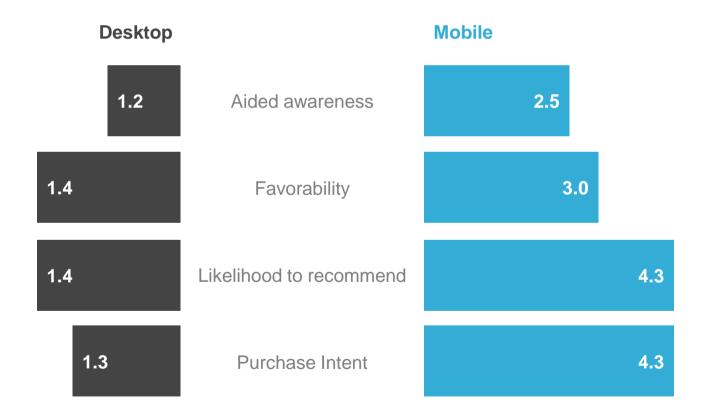
#### App Ads & Monetization



## Mobile ads not only work, but they work much better than desktop ads on average – particularly at the bottom of the funnel.



Source: comScore BSL and mBSL Benchmarks, U.S., 2014

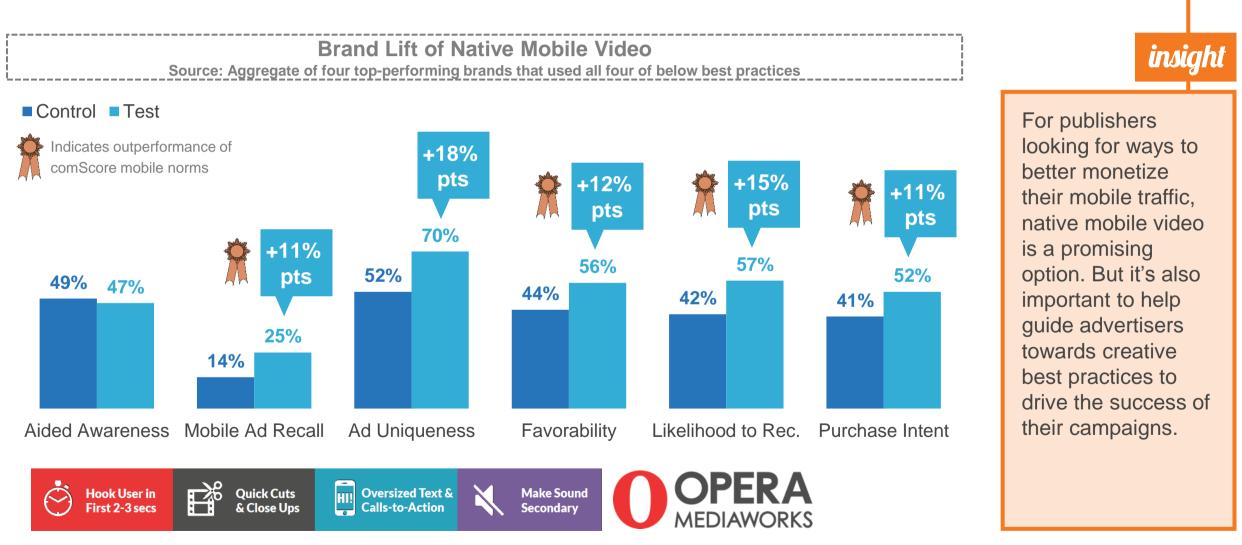




Mobile ads caused point lifts 2-3x greater than ads on desktop across four key brand metrics and performed strongest in bottomfunnel metrics, such as intent to buy and likelihood to recommend. Less ad clutter and proximity to point of purchase may be driving better effectiveness for mobile ads.



# Mobile native in-app video ads can be very effective, especially when adapting ad creative for short-form viewing.







#### Summary & Key Findings



#### **Key Takeaways**

Mobile app usage is exploding as it becomes the #1 means of digital media consumption. But it's not coming at the expense of desktop or mobile web.

Confluence of factors is driving the huge uptick in app usage time, and apps are overtaking other media in importance. However, it's also important to recognize the others haven't gone away and the opportunity lies in multi-platform engagement.

2 App usage is a reflexive, habitual behavior where those occupying the best home screen real estate are used most frequently.

Publishers must place more value on this real estate if they don't want to lose out in the transition to mobile. A small slice of app users can contribute a lot of usage.

(3) Publishers must look to Millennials' app habits to win in mobile long-term.

Millennials are the heaviest app users and they spend a lot of time on social media and other platforms. Publishers must have a well-developed platform strategy to get mobile traffic and find ways to convert app users.







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For more information on the report, please contact:

- Adam Lella, Senior Marketing Insights Analyst, alella@comscore.com
- Andrew Lipsman, VP Marketing & Insights, alipsman@comscore.com
- Ben Martin, Director Global Marketing Insights, bmartin@comscore.com

**Survey Research by** 

**Kelly Pedotto** 

**Custom Data Analytics by** 

J.P. McElyea