

COMSCORE

**THE 2017 U.S.**

# Mobile App Report



# About this report

The **2017 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 1,033 smartphone users in July 2017 to understand their habits. In some charts we compare these results to our August 2016 and August 2015 surveys.

## Important Definitions:

- Any reference to “mobile” means the combination of smartphone and tablet. When data is referring specifically to smartphones or tablets, it will be labeled accordingly.
- All mobile data is based on Age 18+ population.
- Age 18-34 segment may be referred to as “Millennials”.
- 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”.

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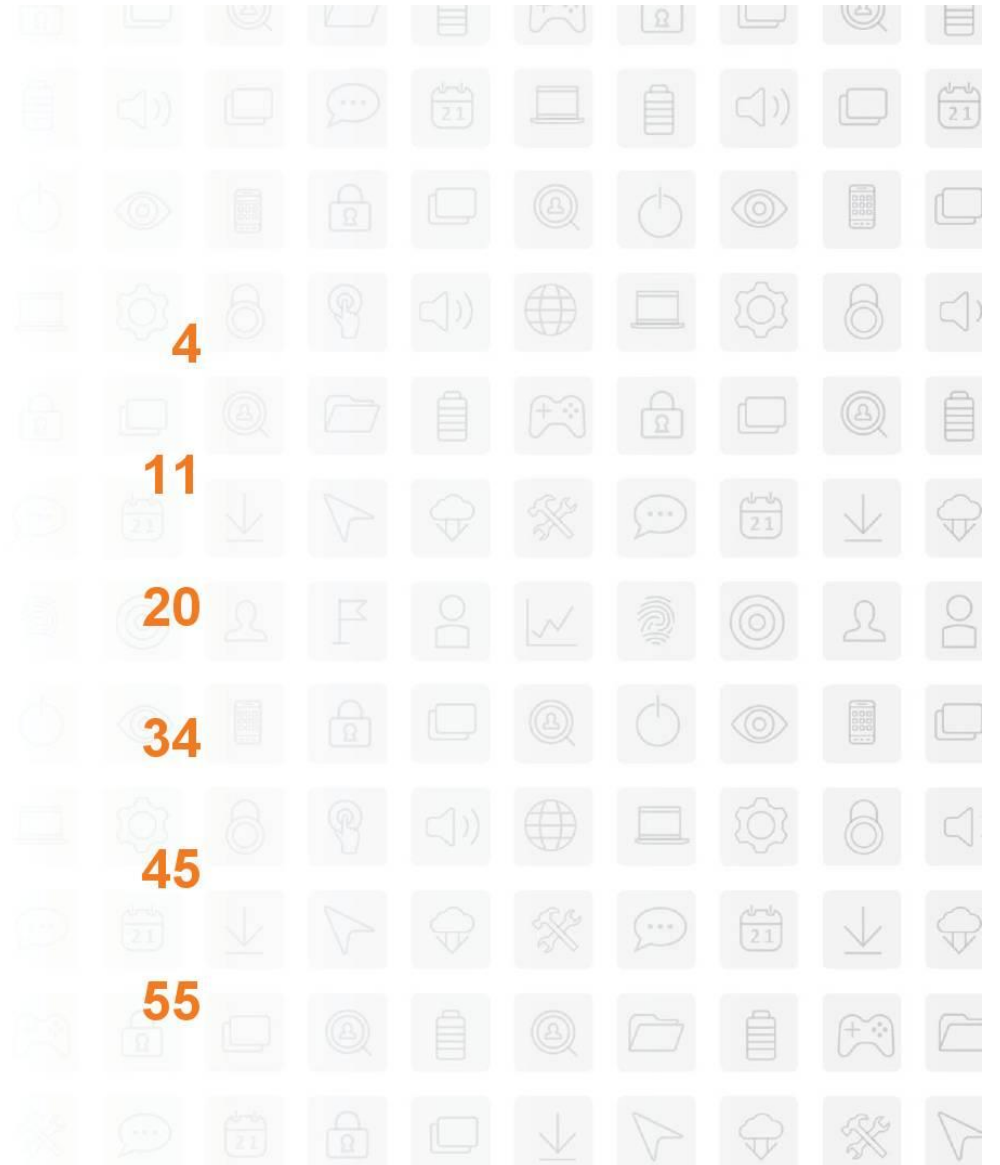
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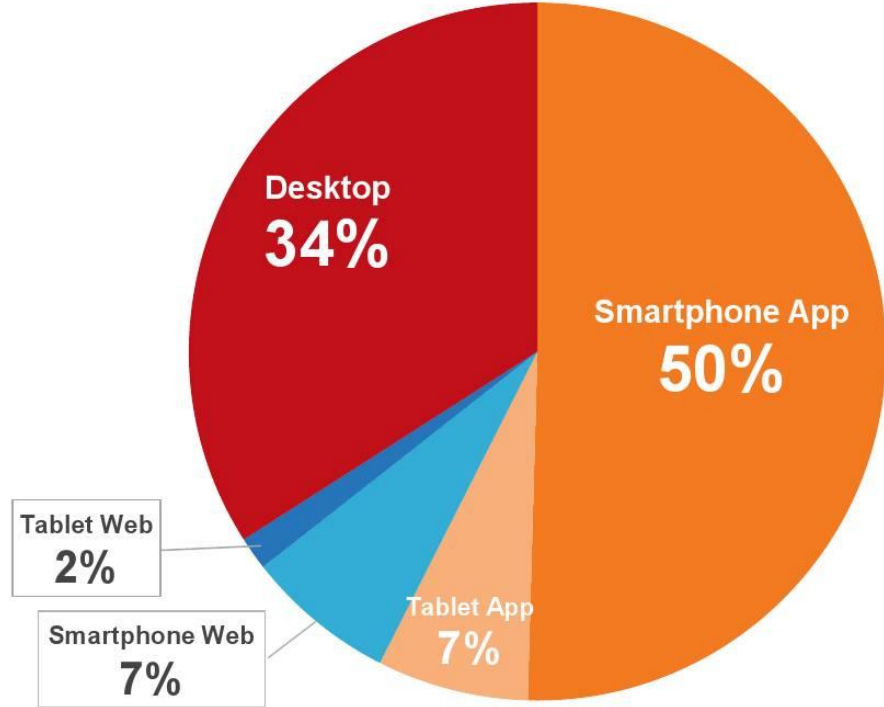


# App Overview

Digital media usage time is driven by mobile apps, with smartphone apps accounting for half of all time spent

### Share of Digital Media Time Spent

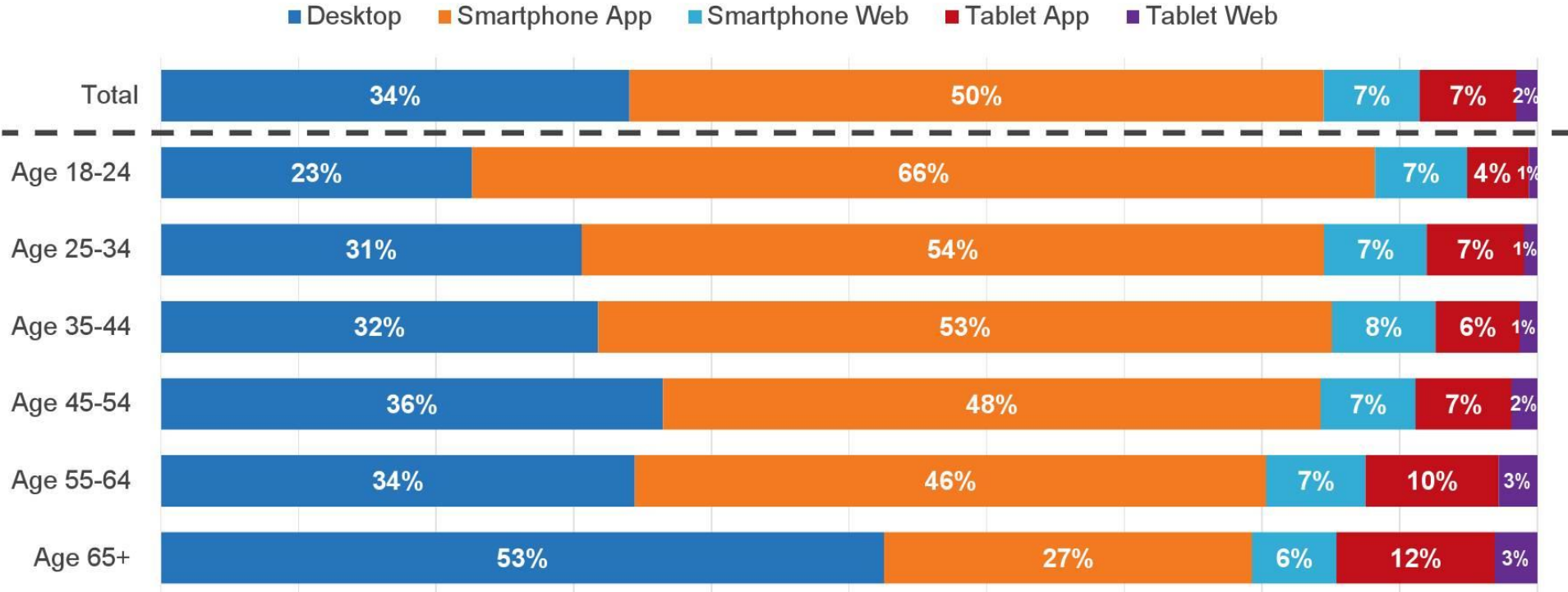
Source: comScore Media Metrix Multi-Platform & Mobile Metrix, U.S., Total Audience, June 2017



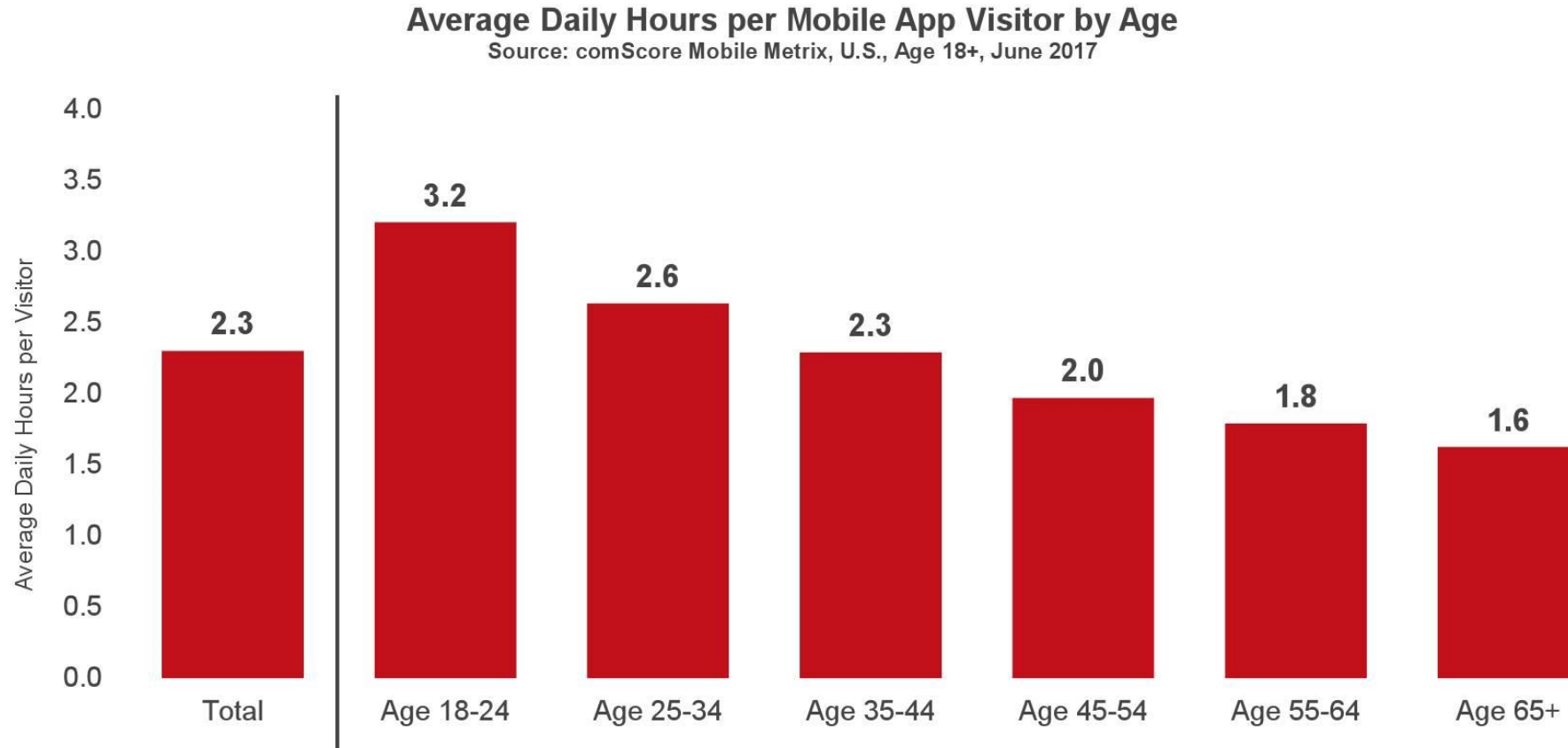
# The smartphone dominates for 18-24 year-olds, who spend an amazing 2/3<sup>rd</sup> of their digital media time on smartphone apps alone

## Share of Platform Time Spent by Age

Source: comScore Media Metrix Multi-Platform & Mobile Metrix, U.S., Age 18+, June 2017



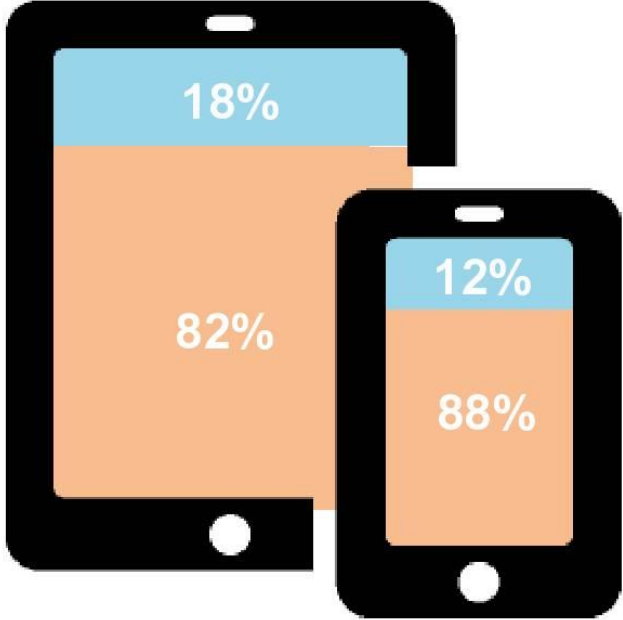
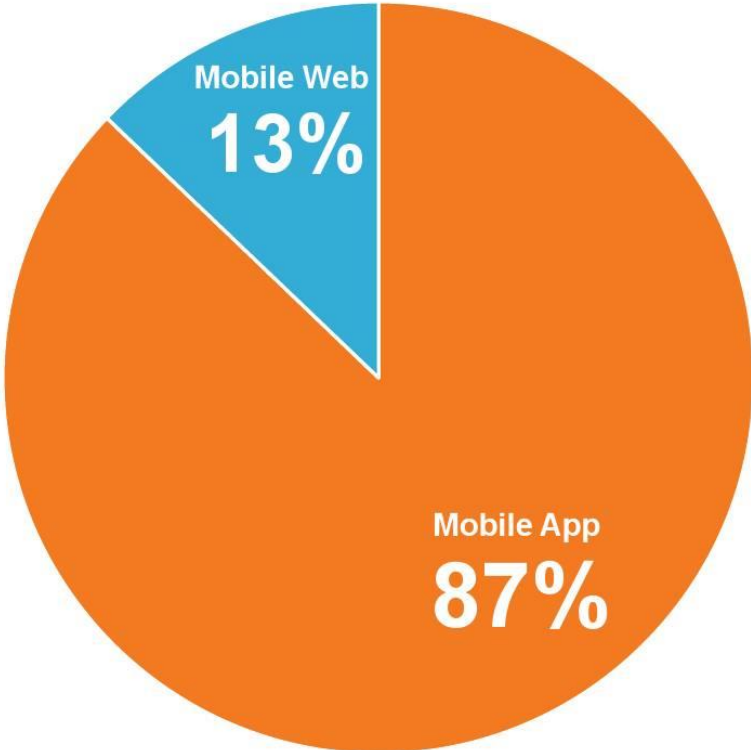
App usage tends to be heavier among younger users, with 18-24 year-olds spending more than 3 hours a day on apps



Mobile app dominates time spent vs. mobile web, with a slightly higher split for smartphones than tablets

**Share of Time Spent on Mobile: App vs. Web**

Source: comScore Mobile Metrix, U.S., Age 18+, June 2017

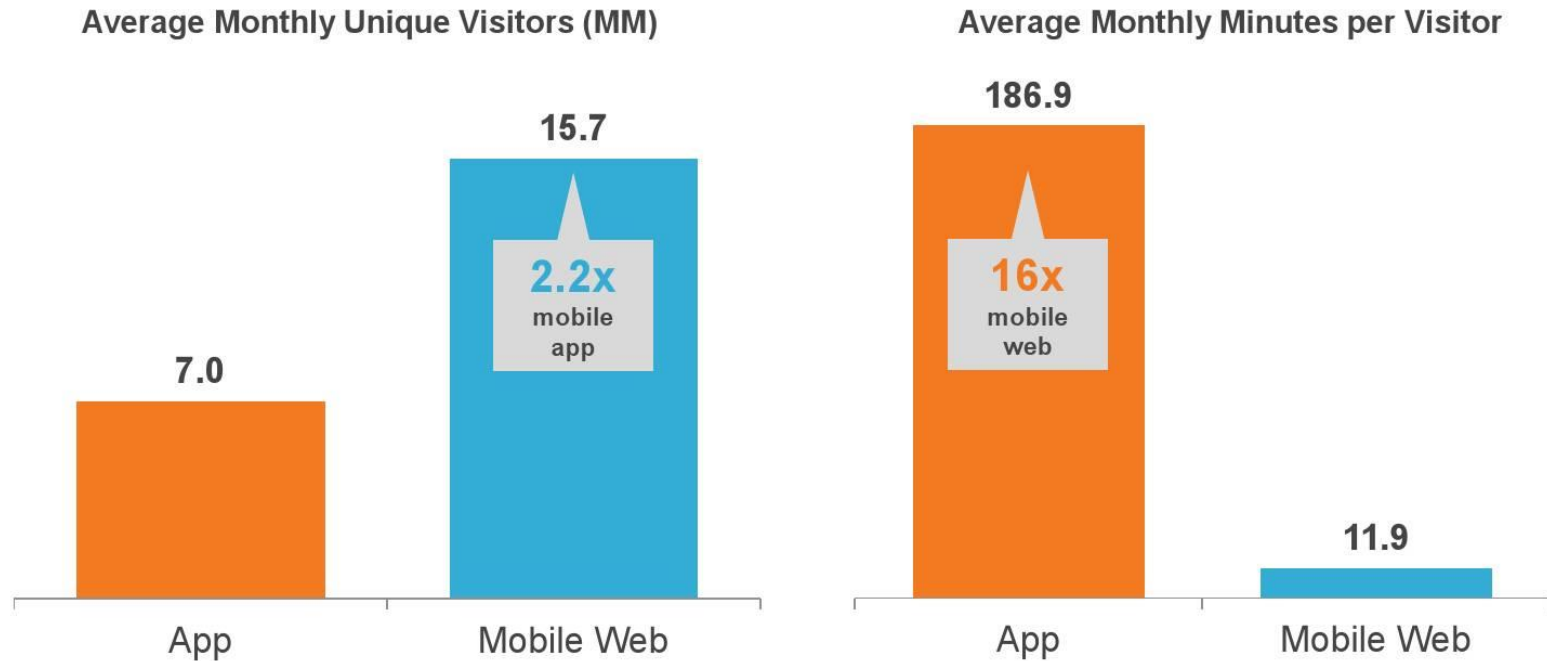




The average user spends 16x more time on the top apps than they do on the top mobile websites, but mobile web tends to capture larger audiences

### Top 500 Mobile Apps vs. Top 500 Mobile Web Properties

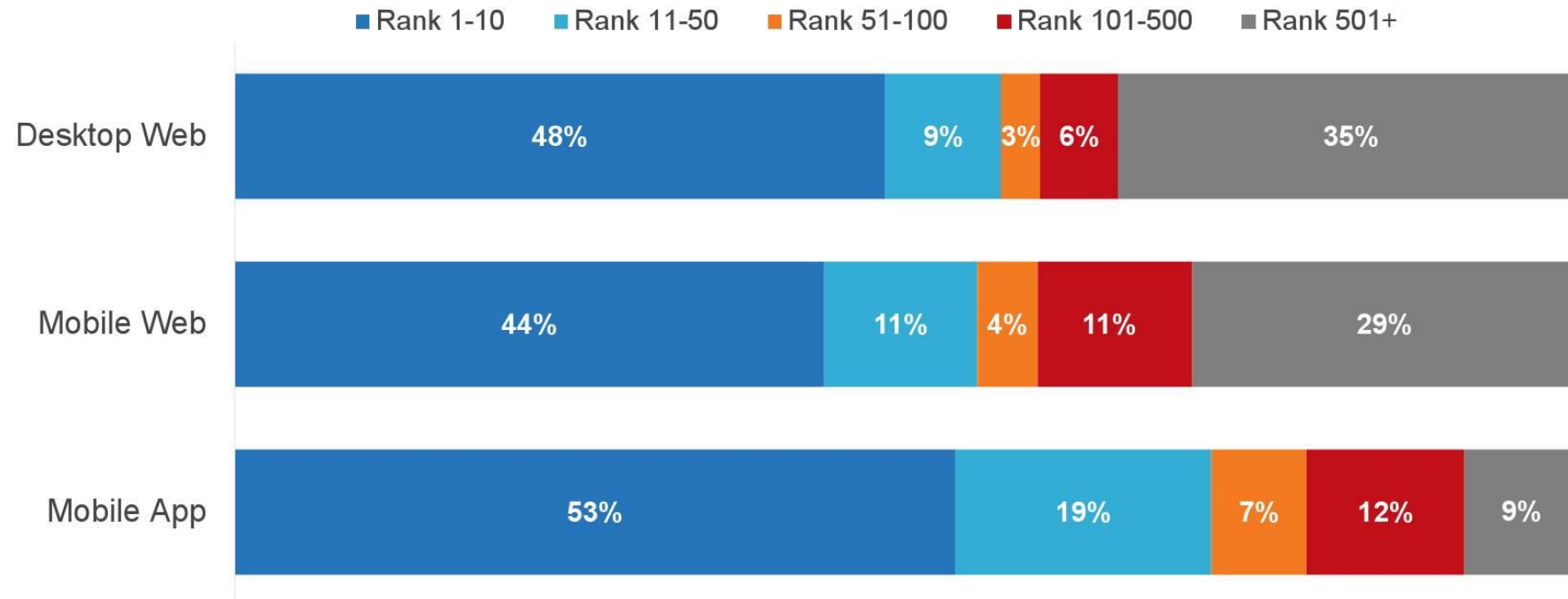
Source: comScore Mobile Metrix, U.S., Age 18+, June 2017



Mobile apps have a higher concentration of time spent in the top 10 and a significantly smaller long-tail than desktop and mobile web

### Concentration of Time Spent in Top Websites & Apps

Source: comScore Media Metrix Multi-Platform & Mobile Metrix, U.S., Total Audience, June 2017

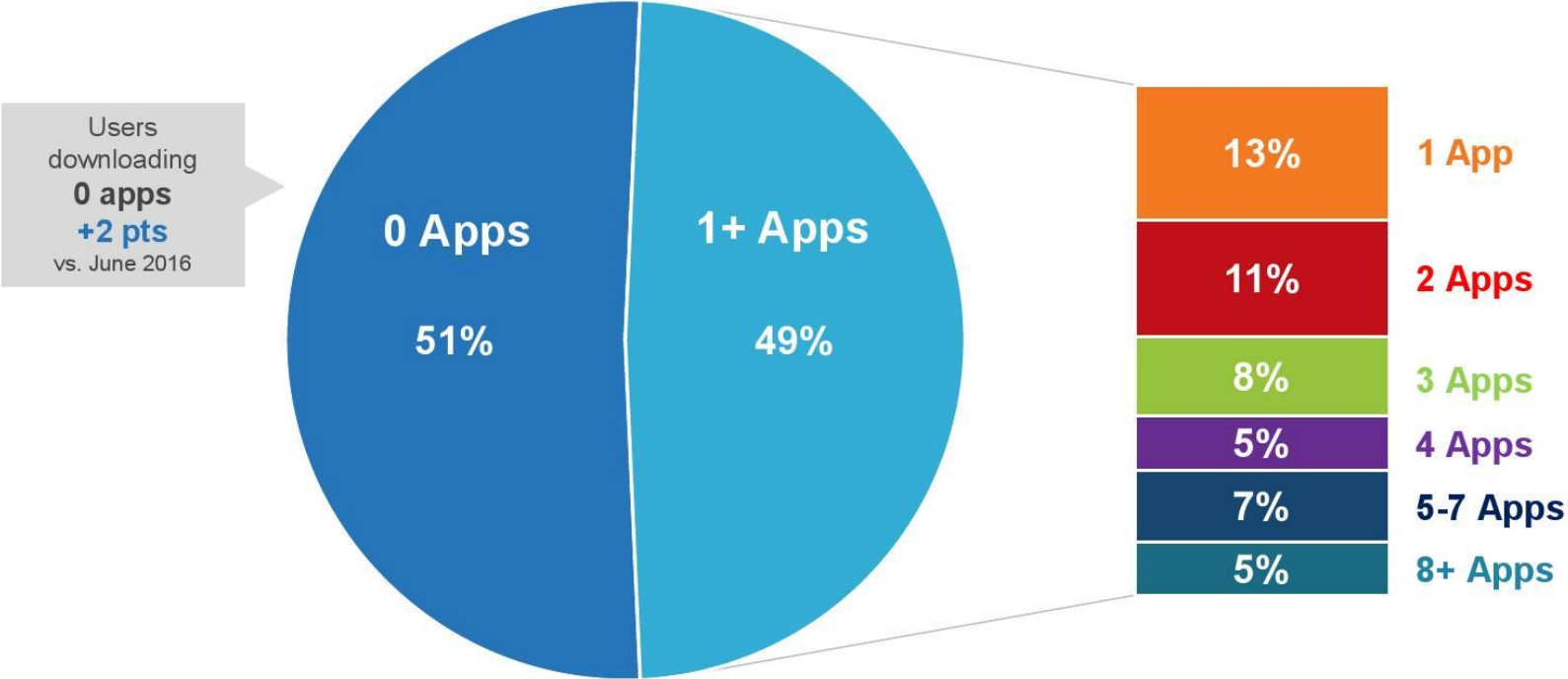


# App Download Habits

A majority share of smartphone users don't download any apps in a month, and the average user downloads two

### Smartphone Users' Number of App Downloads Per Month

Source: comScore MobiLens, U.S., Age 13+, 3 Month Average Ending June 2017

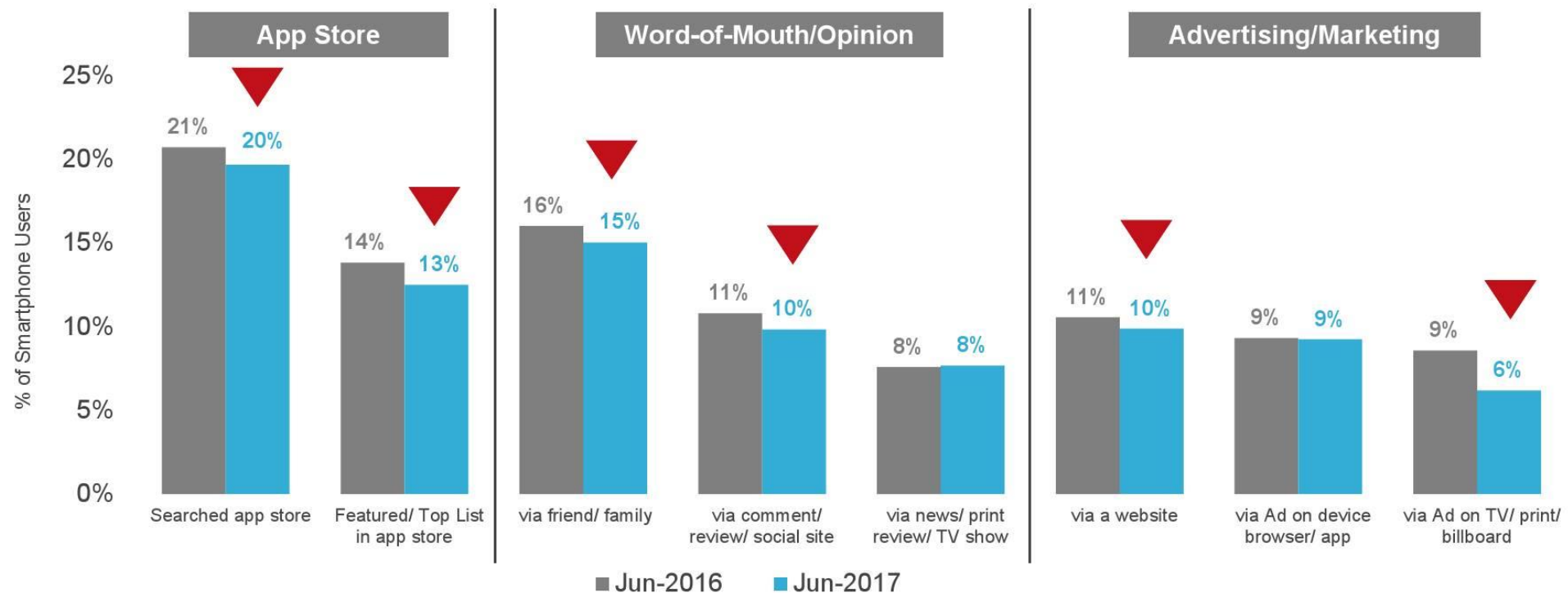


\* comScore made significant improvements to the statistical weights and audience projections for MobiLens in 2015. Due to these changes, comparisons of this chart with a similar version that appeared in The 2014 U.S. Mobile App Report should be avoided.

App discovery is down across several channels, including the app store, word-of-mouth and advertising. Is interest in new apps waning?

### Most Common App Discovery Channels Among Smartphone Users

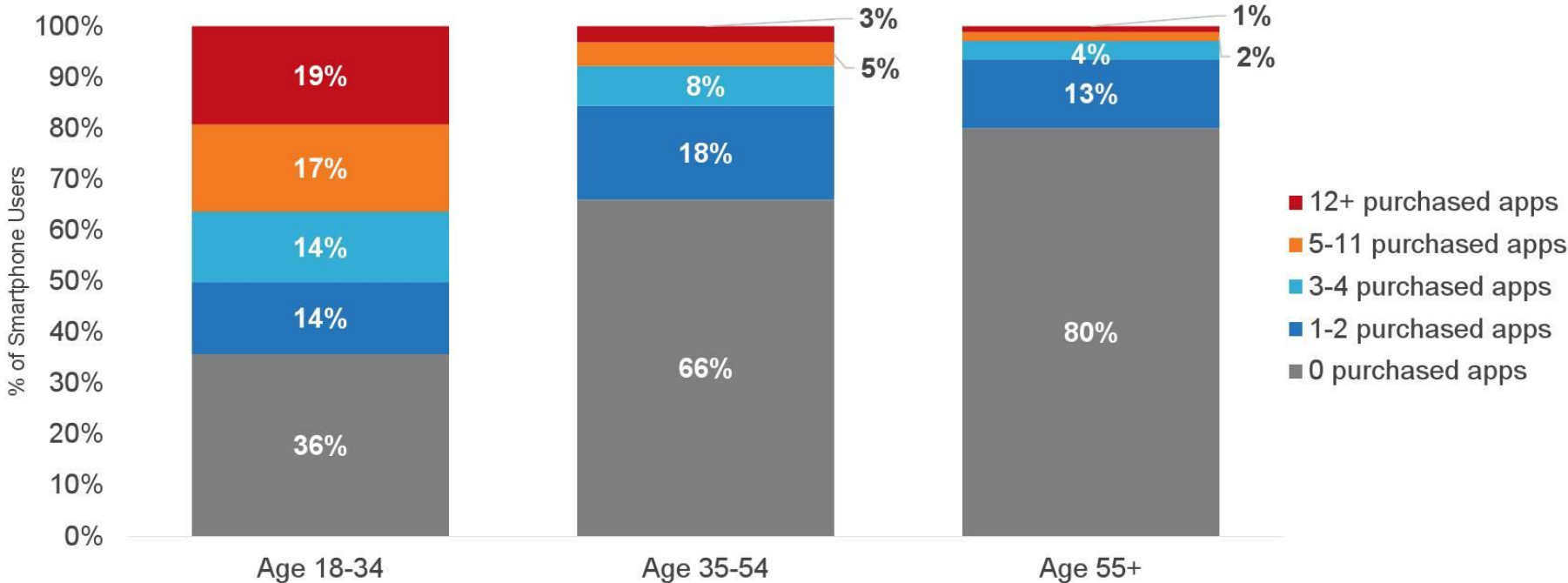
Source: comScore MobiLens, U.S., Age 13+, 3 Month Average Ending June 2017 vs. June 2016



Millennials are much more willing to shell out cash for apps, with 1 out of 5 downloading an average of one paid app per month

### App Purchases in the Past Year by Age Segment

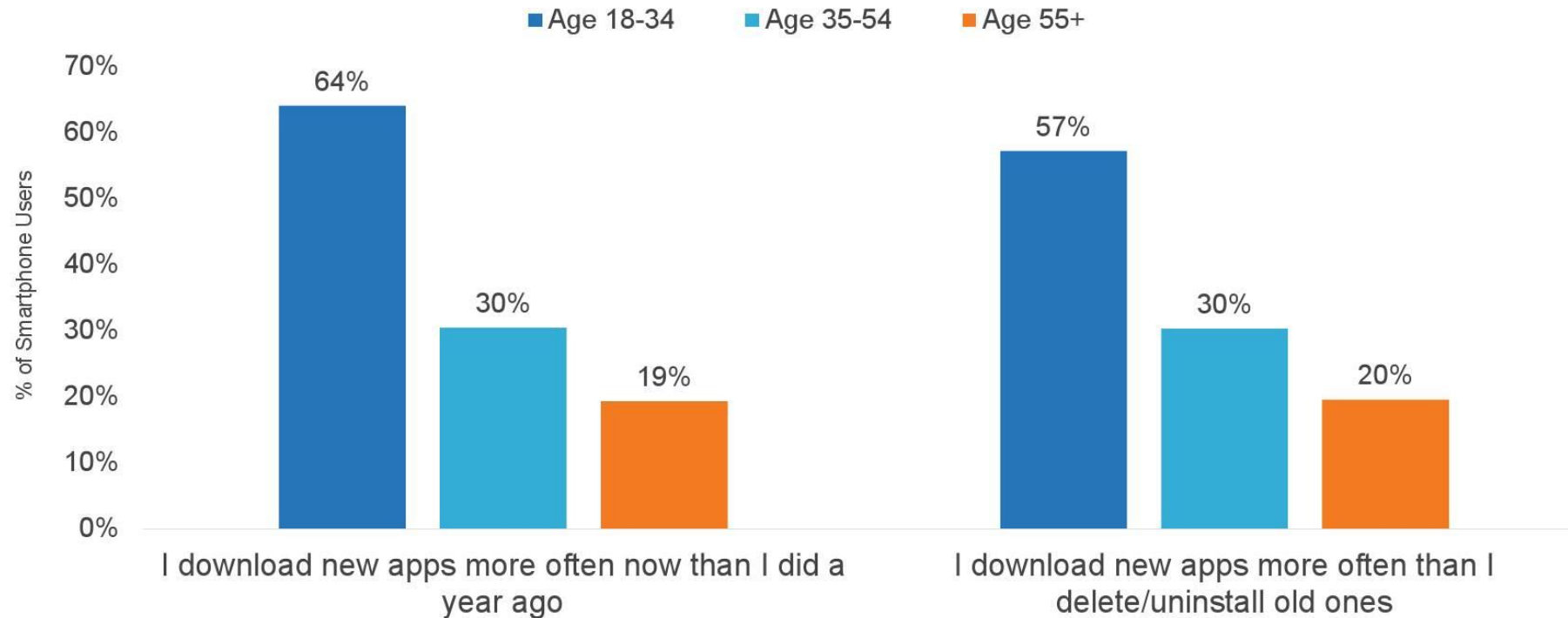
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



# Millennials are still adding apps often, but older smartphone users' download habits are losing steam and they may now be net app deleters

## Smartphone Users' App Addition/Deletion Habits by Age Segment\*

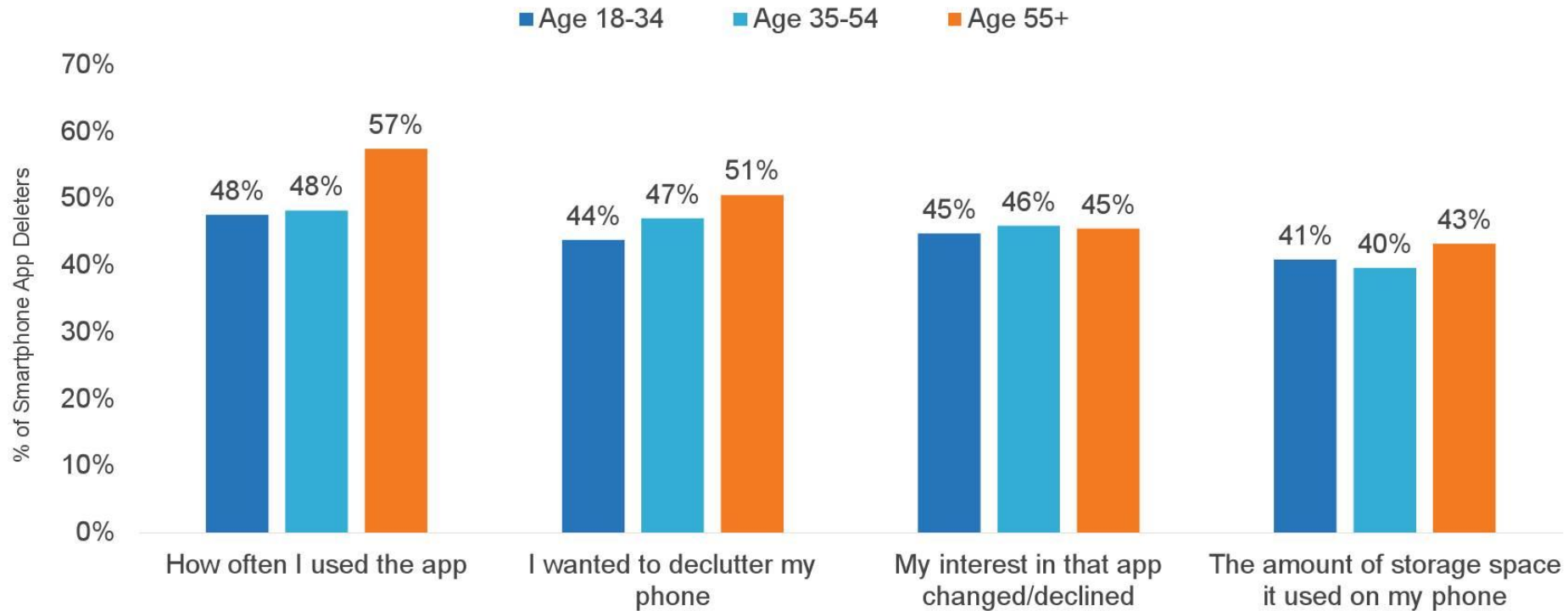
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



The top reasons for deleting apps are largely consistent across age groups, with usage frequency ranking as the top factor

### Smartphone Users' Reported Reasons for Deleting Apps by Age Segment\*

Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave

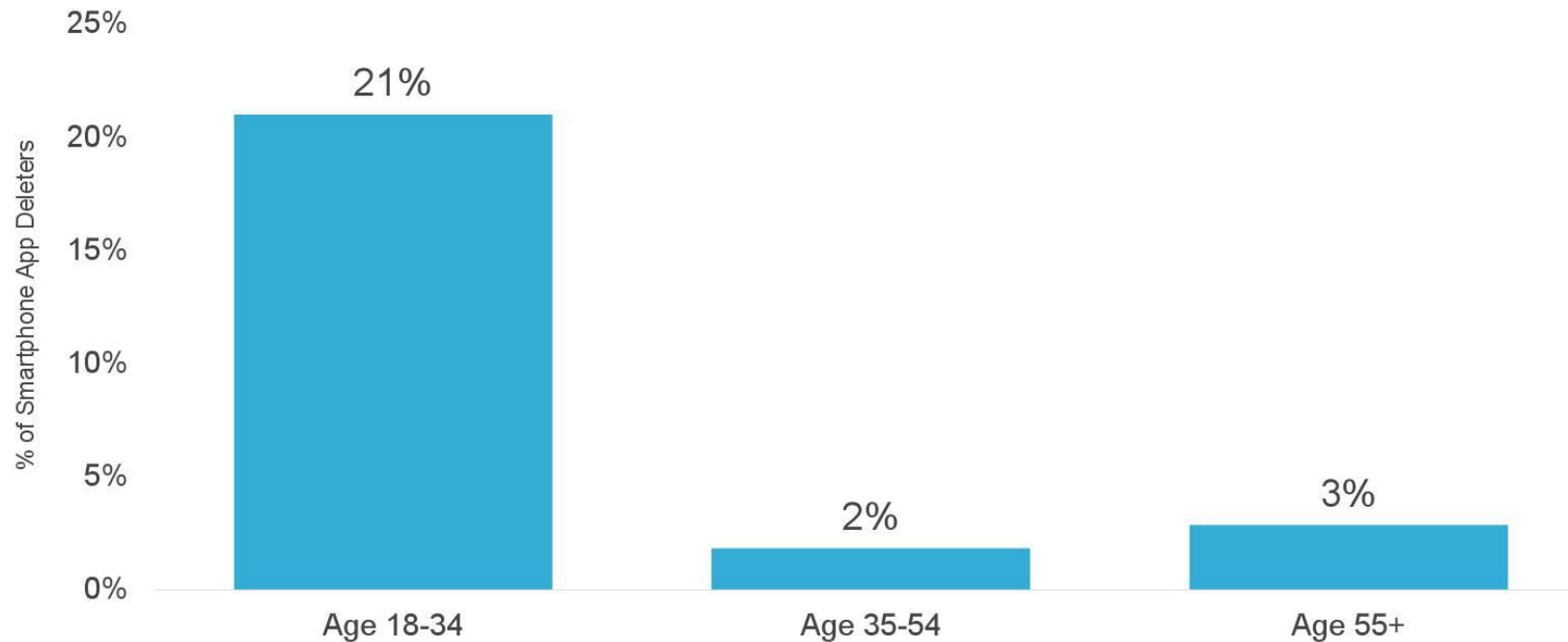




Logos matter. Because apps confer social identity, Millennials will delete an app if they don't like how it looks on their screen.

### Deleted Apps in the Past Year Because They Didn't Like How it Looked on their Home Screen\*

Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave

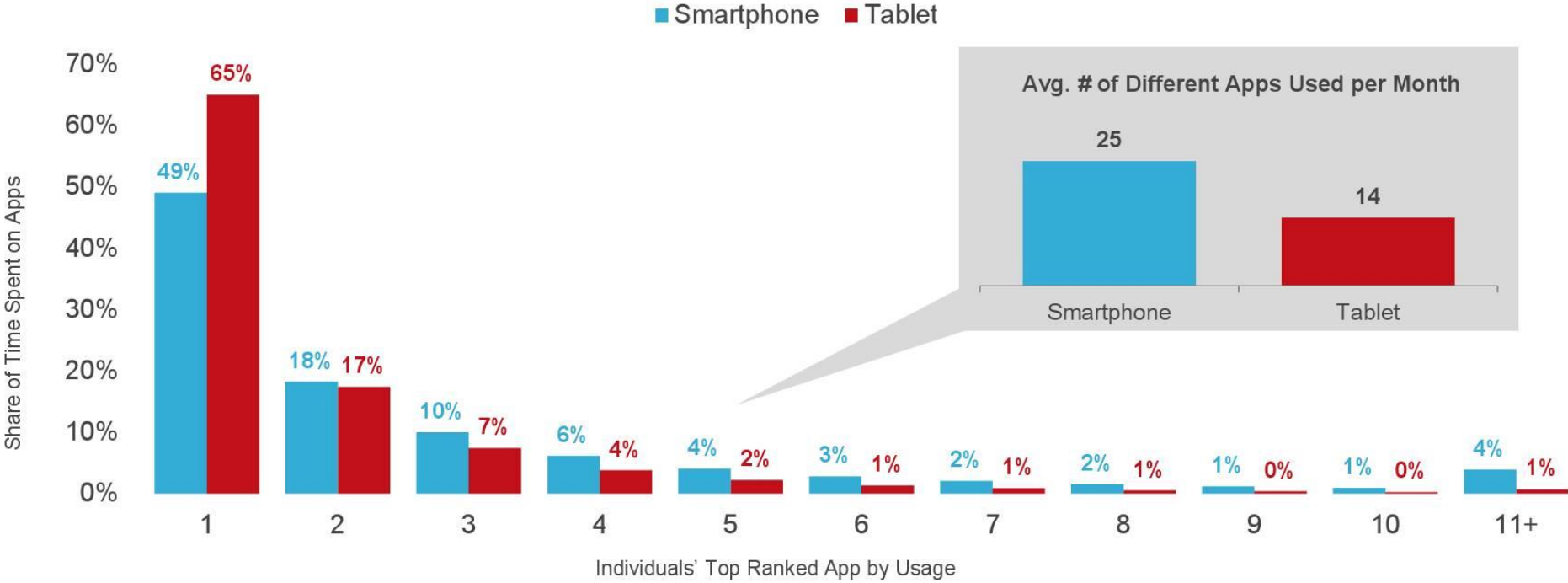


# App Usage Habits

Smartphone users spend half their time on their #1 most used app, while tablet users spend almost 2/3<sup>rd</sup>s of their time on it

**Share of Individual Users' Time Spent on Apps by Rank**

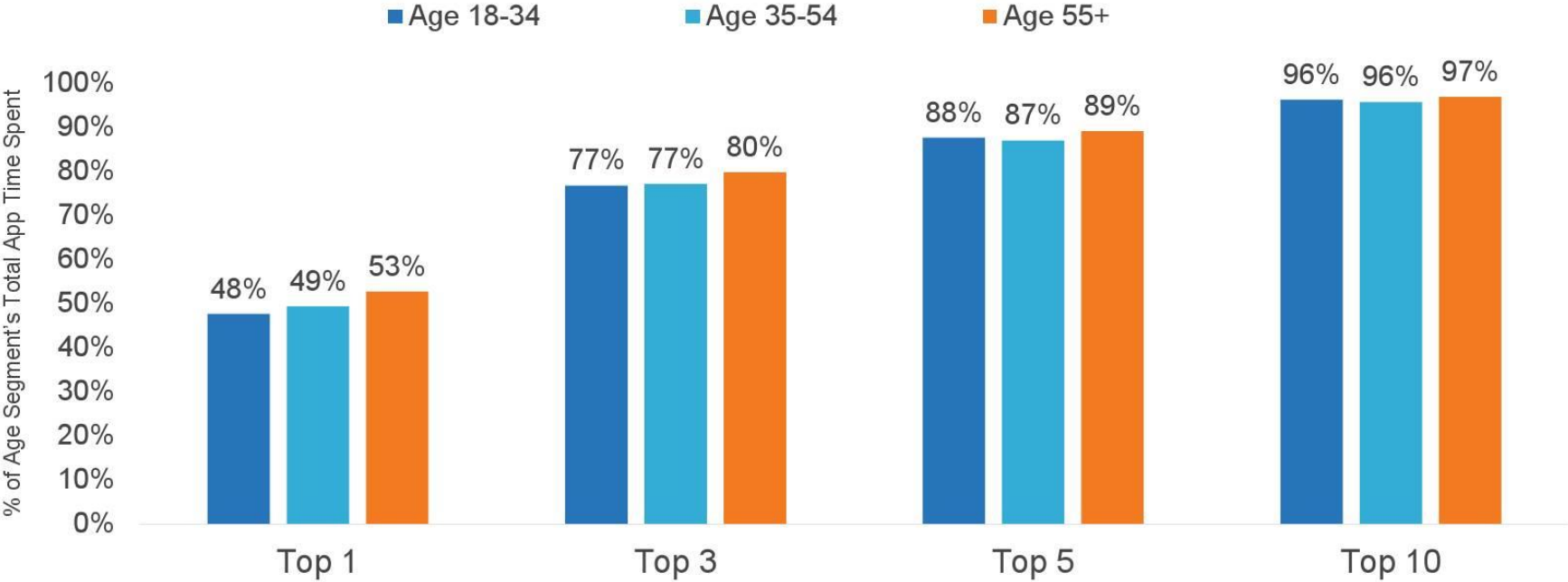
Source: comScore Mobile Metrix (Custom), U.S., Age 18+, June 2017



Across age segments, smartphone users' #1 app accounts for half of all time spent on apps, and the top 10 account for almost the entirety

### Concentration of App Time Spent by Smartphone App Rank

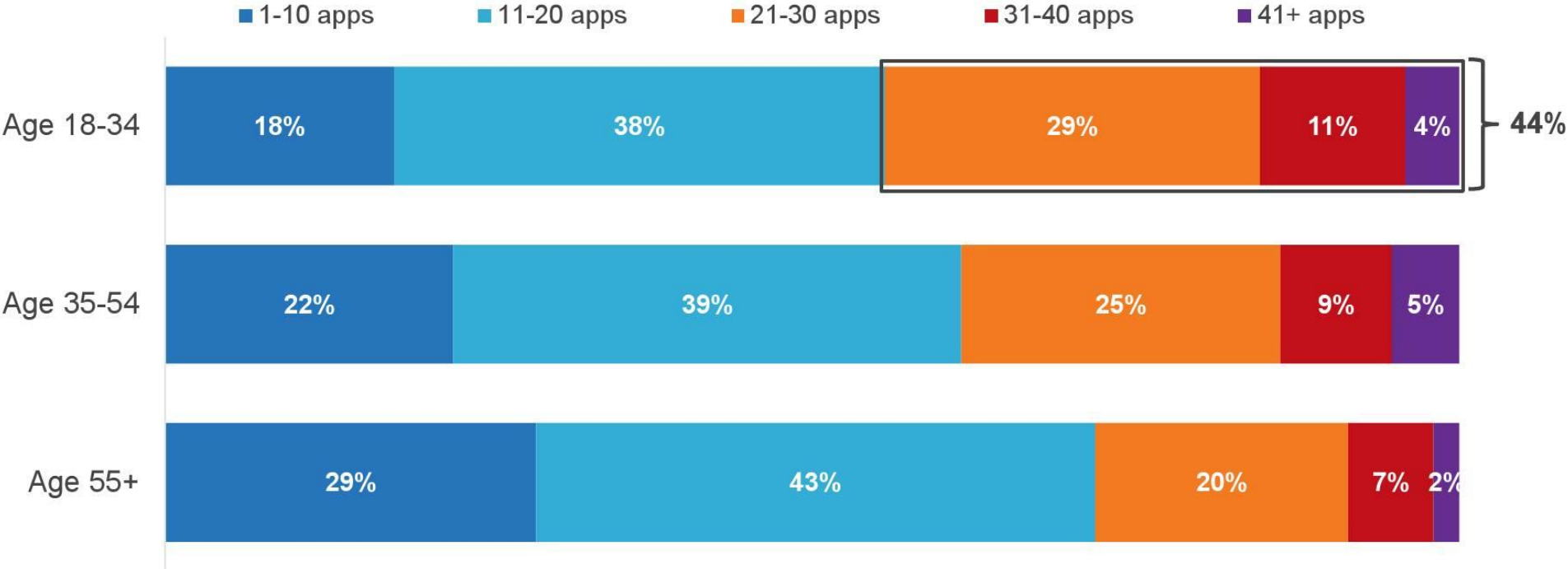
Source: comScore Mobile Metrix (Custom), U.S., Age 18+, June 2017



The majority of app users access 20 or fewer apps in a month, but younger users are much more likely to exceed that

### Number of Monthly Apps Used by Age Segment

Source: comScore Mobile Metrix (Custom), U.S., Age 18+, June 2017



# Despite using more apps than older segments, Millennials utilize fewer screens on their phone and instead organize their apps into folders

## Number of Screens Featuring Apps on Users' Smartphones

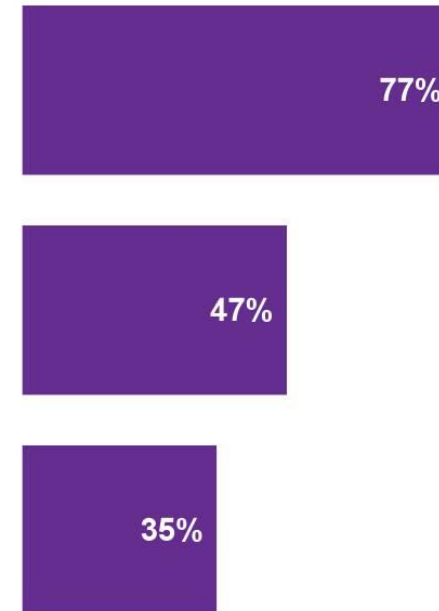
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave

■ 1 Screen ■ 2 Screens ■ 3 Screens ■ 4 Screens ■ 5+ Screens

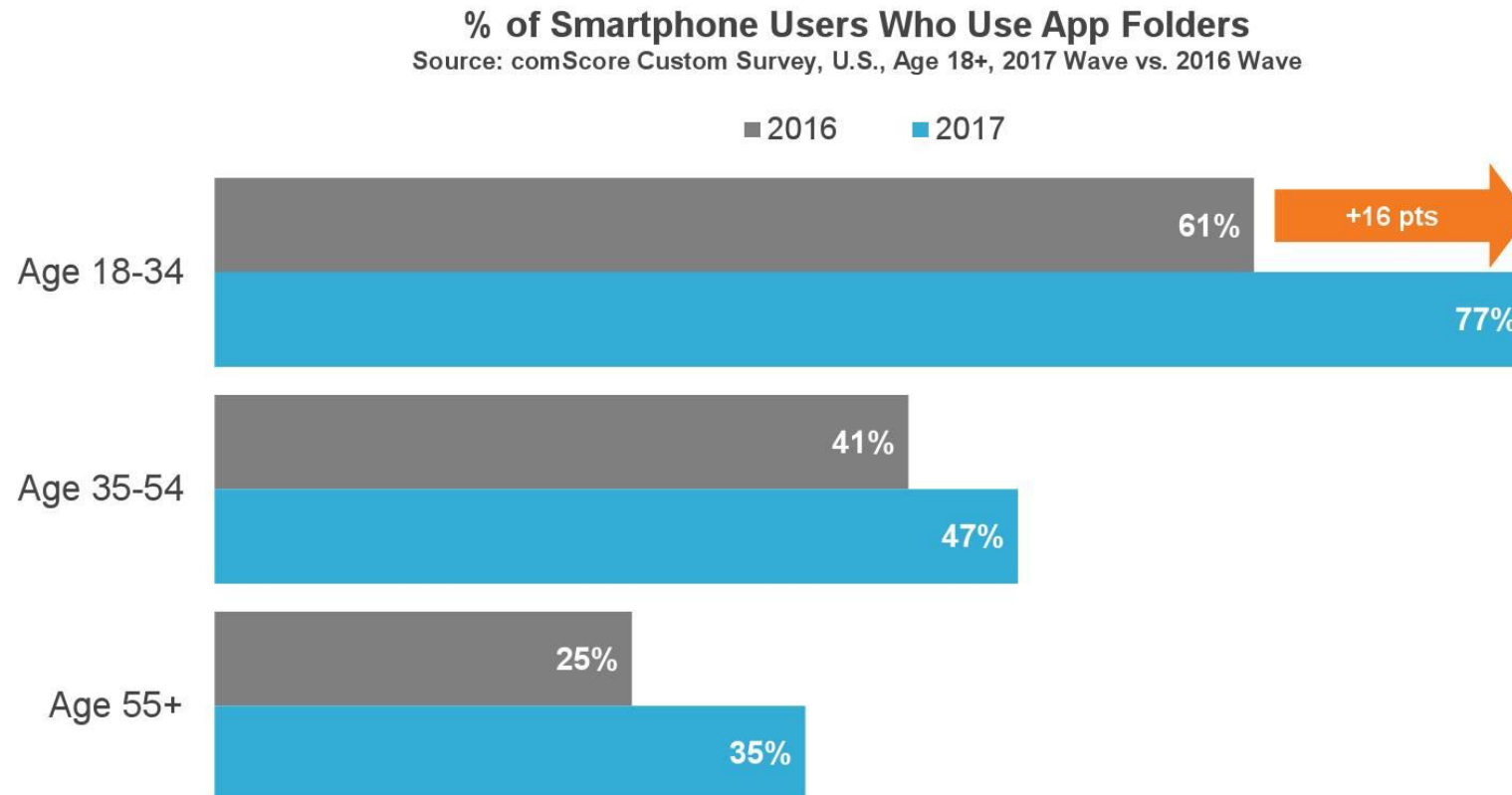


## % of Smartphone Users Who Use App Folders

Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



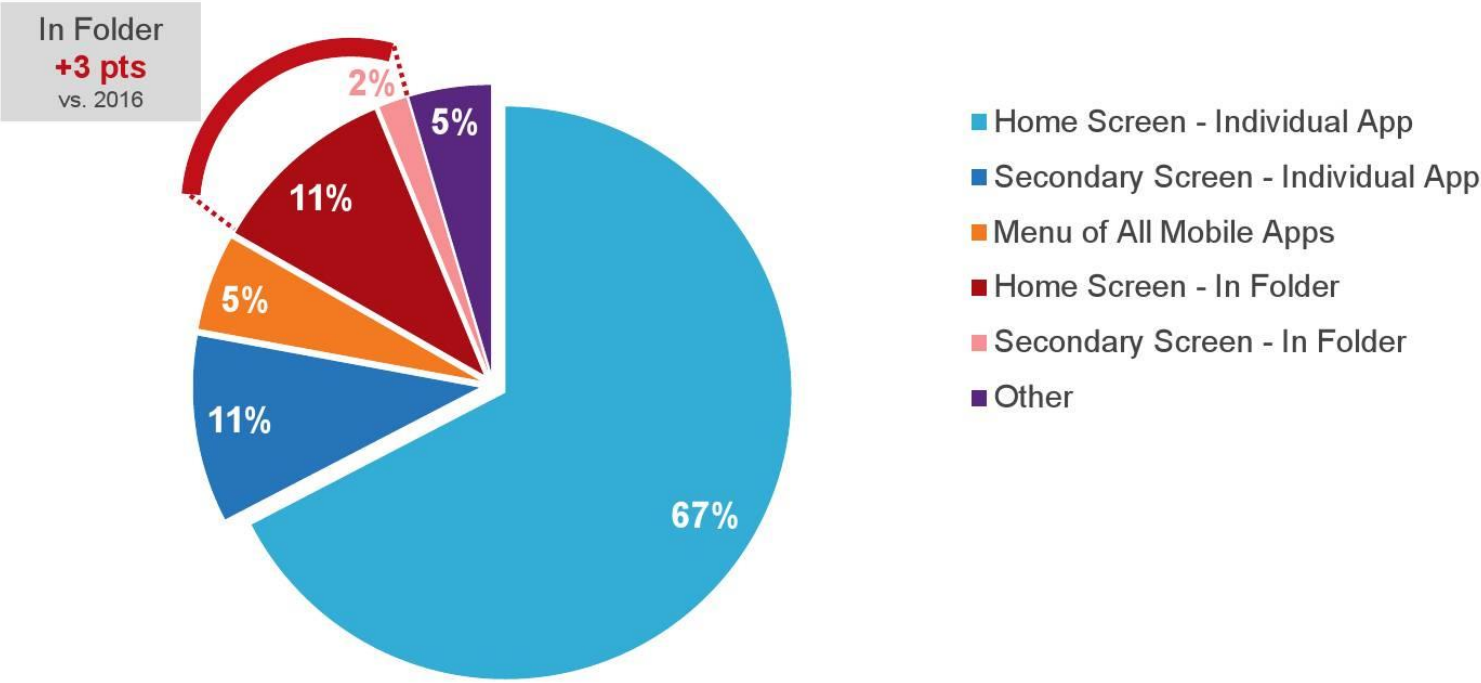
All age groups are relying on folders more as they seek to organize the high number of apps on their smartphones



2 in 3 smartphone users keep their #1 most used app front and center on the home screen, but more users are now putting it in a folder

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

Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave

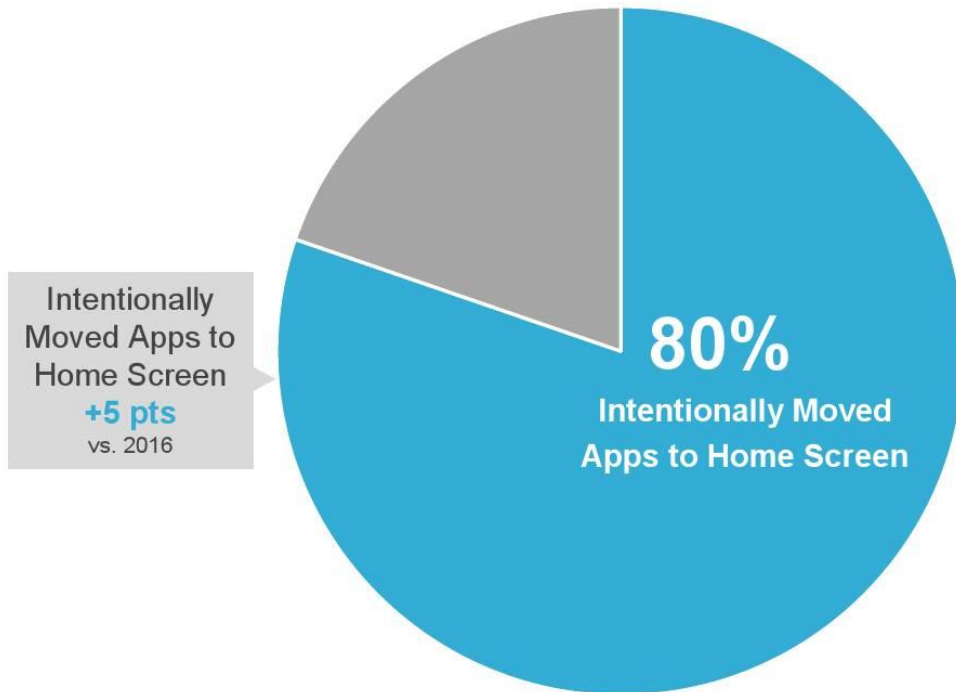




It's becoming more common for smartphone users to strategically position apps on their home screen, with frequency of use being the top factor

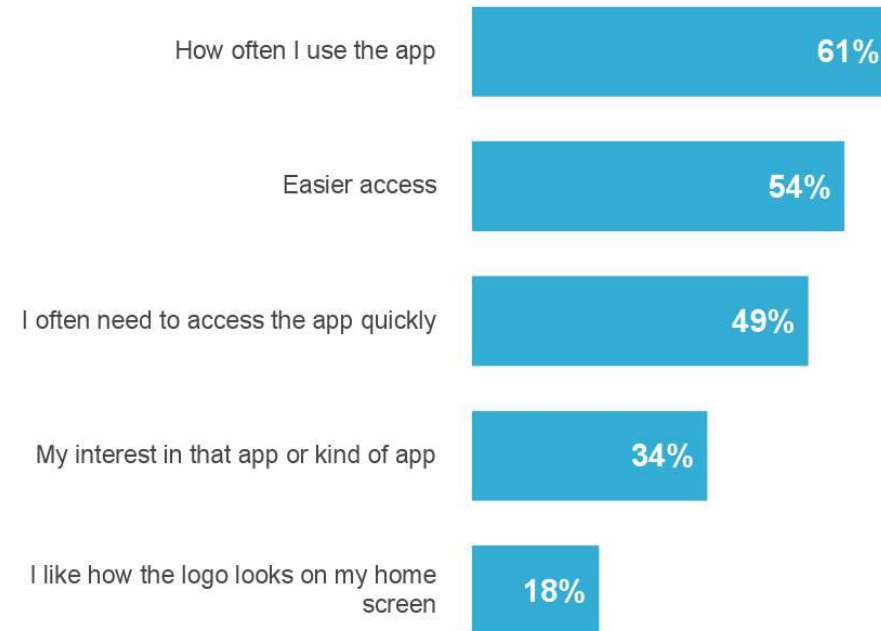
### Percent of Users that Intentionally Move Apps to Home Screen

Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave

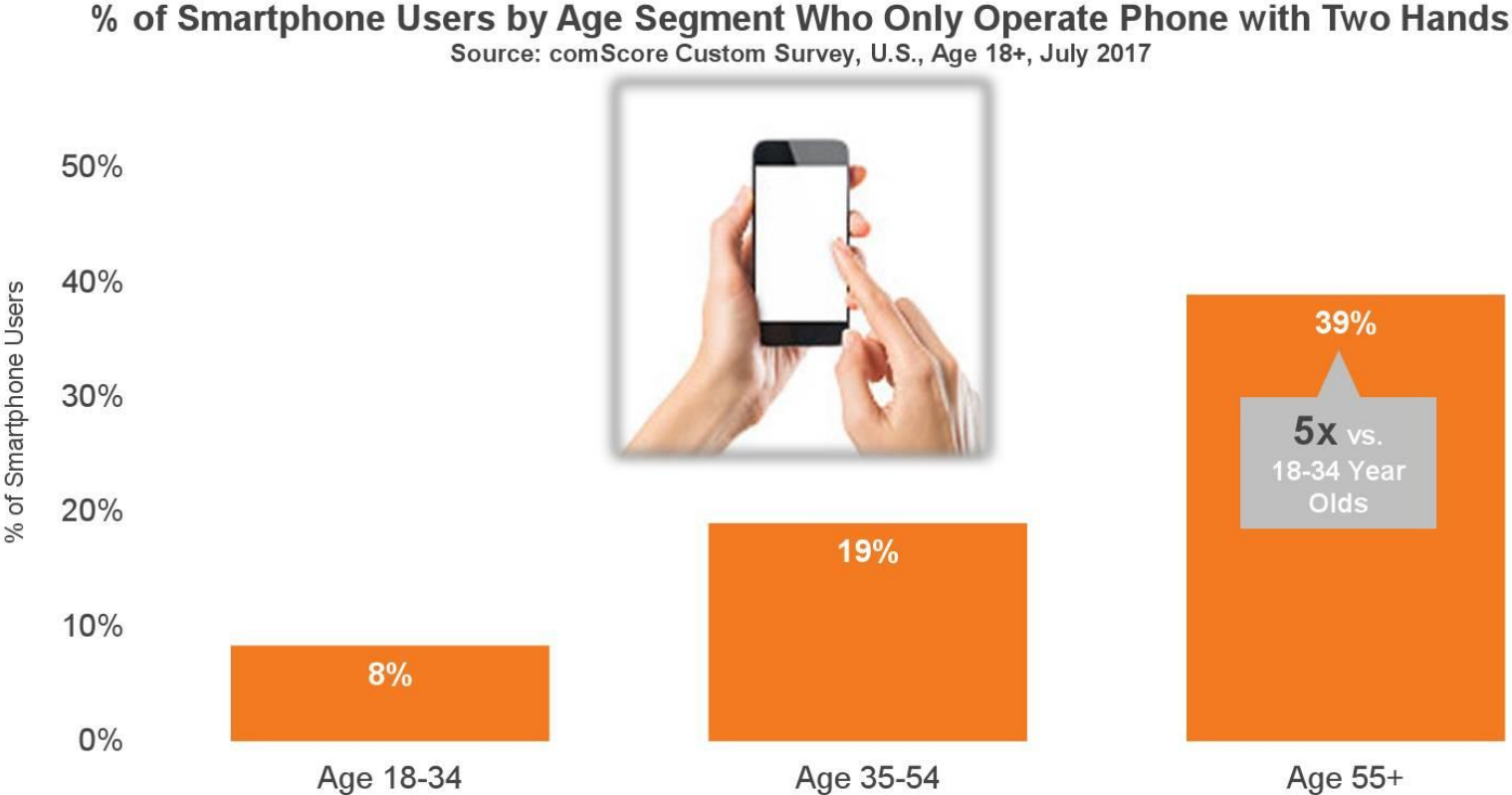


### Top Factors Influencing Decision to Move Apps to Home Screen

Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



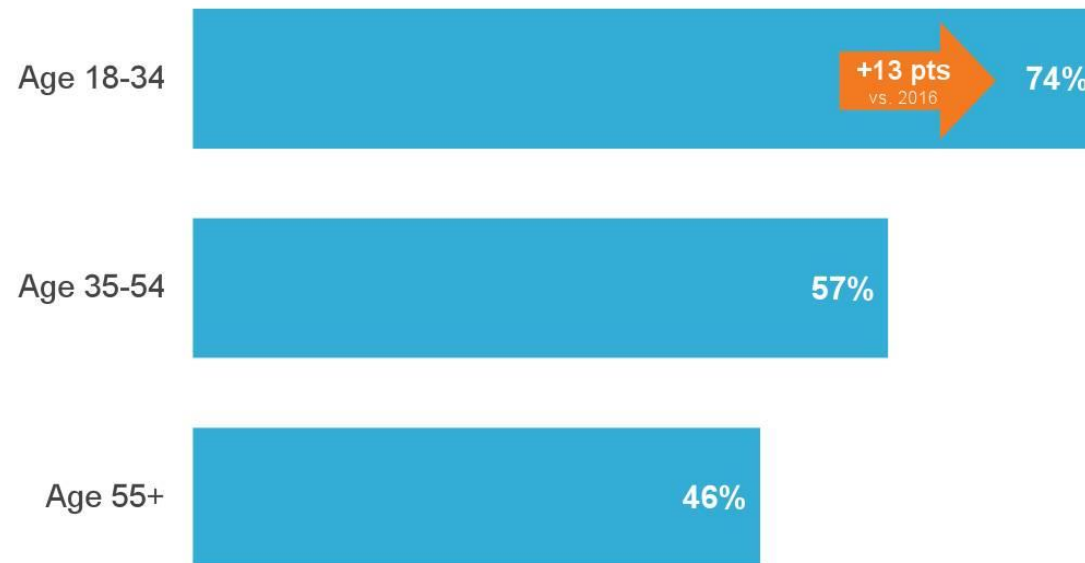
# 55+ year-olds are 5x as likely as 18-34 year-olds to only operate their smartphone with two hands



# Millennials are more likely to position apps on their phones based on 'thumb reach' and are increasingly considering this dynamic

## % of One-Handed Smartphone Users who Consider Thumb Reach when Positioning Apps on Phone Screen\*

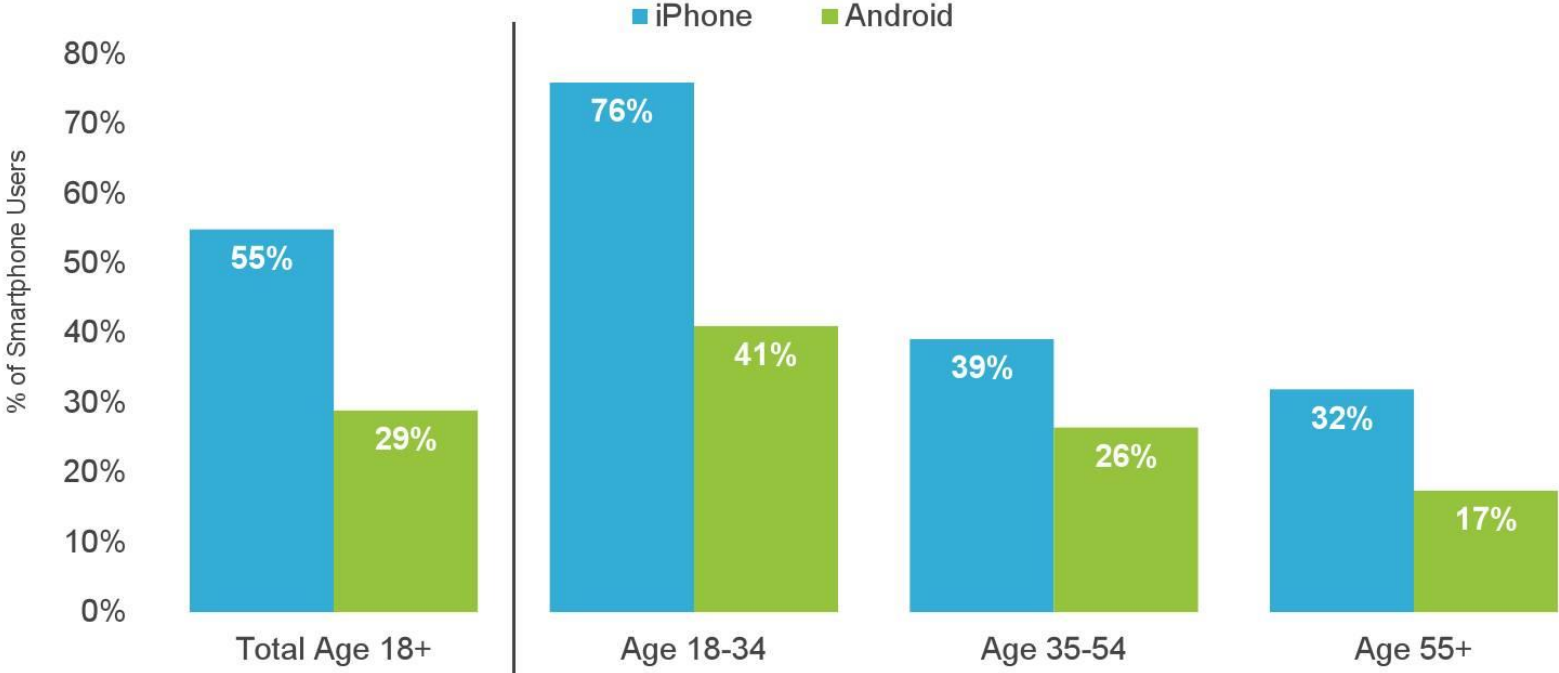
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



As single-handed, tech-savvy smartphone users, Millennials are more likely to use the reachability feature – especially on iPhone

**% of Smartphone Users who Use Reachability Feature by Age Segment & Platform**

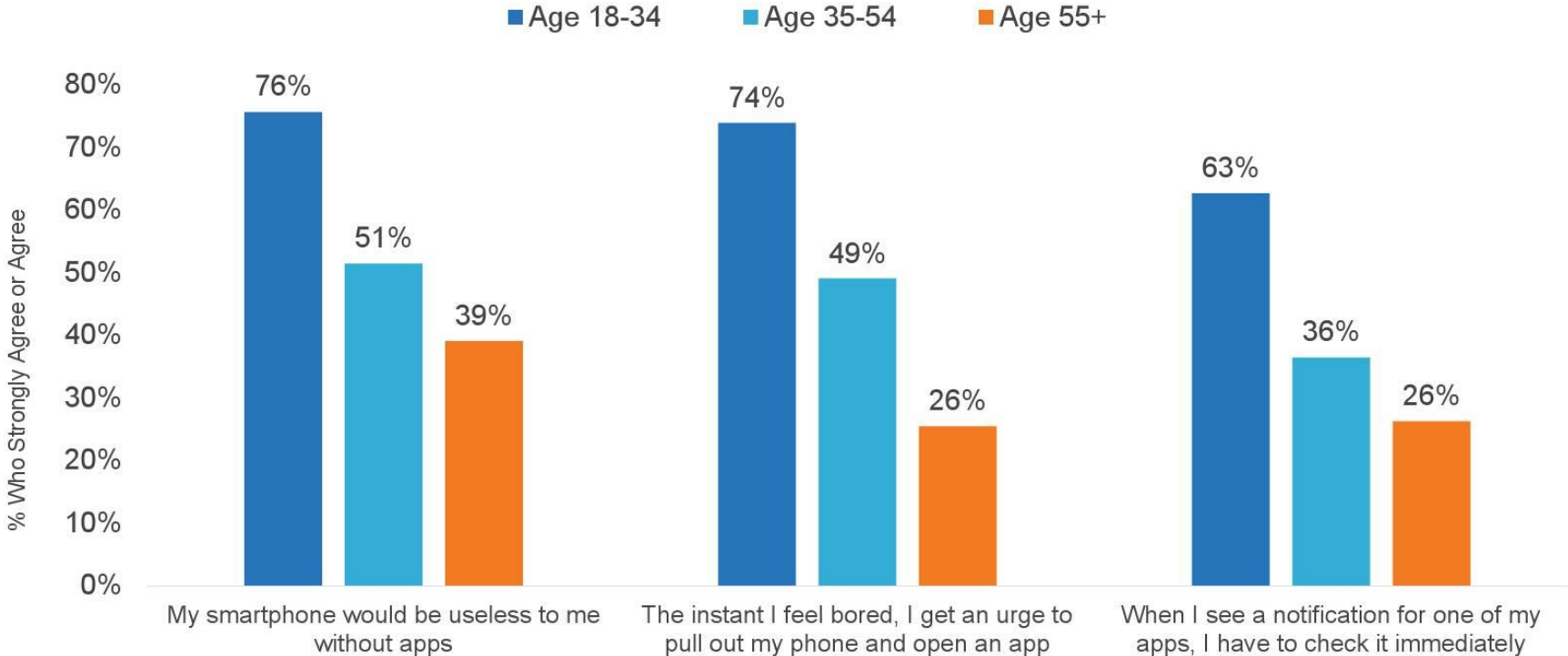
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



# Signs of 'app addiction' are much more prevalent amongst Millennials, who rely on apps and have the urge to constantly check them

### Smartphone Users' Attitudes About the Importance of Apps by Age Segment\*

Source: Custom Survey, U.S., Age 18+, 2017 Wave

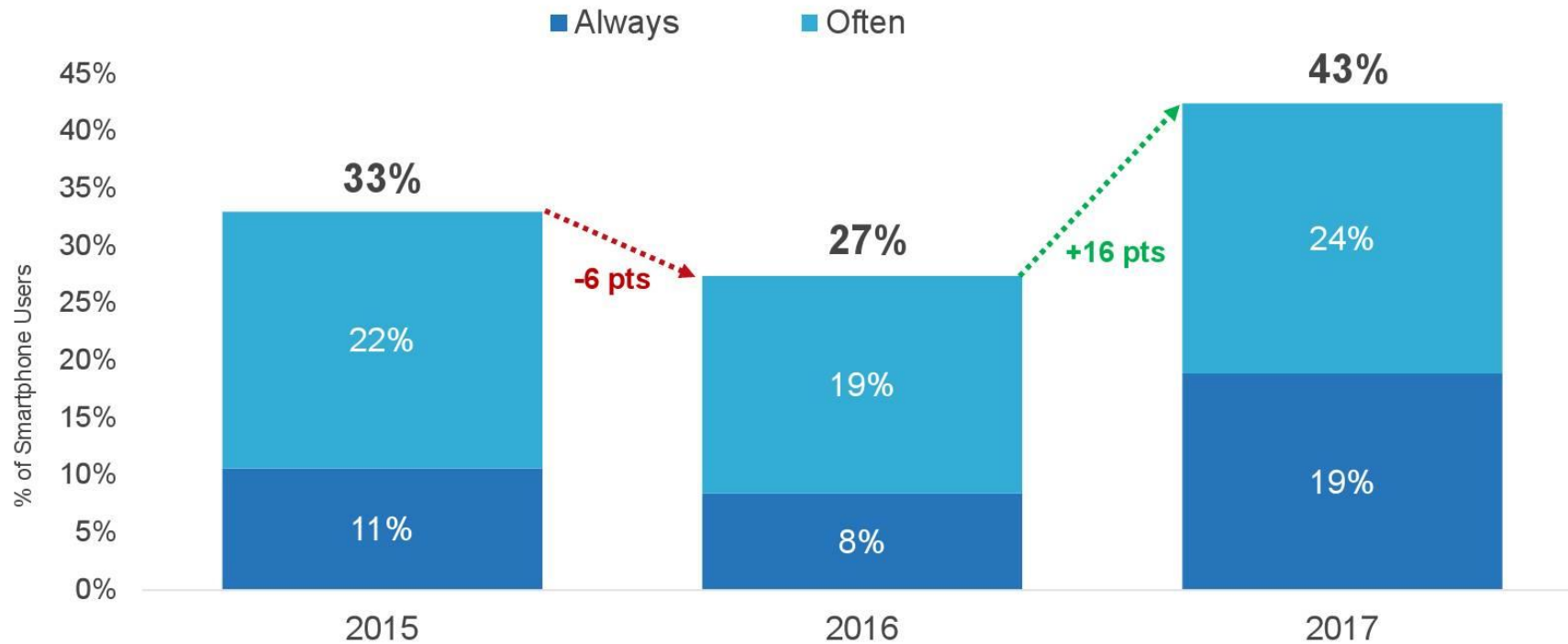


\* Represents the percentage of smartphone users who responded on a 5-point scale that they "Strongly Agree" or "Somewhat Agree" with the statements shown.

# Last year's increase in 'push notification fatigue' reversed itself in 2017. Is the uptick in news events making users want to stay more connected?

**Q: How often do you agree to an app's request to allow push notifications?\***

Source: comScore Custom Survey, U.S., Age 18+, 2015 / 2016 / 2017 Waves



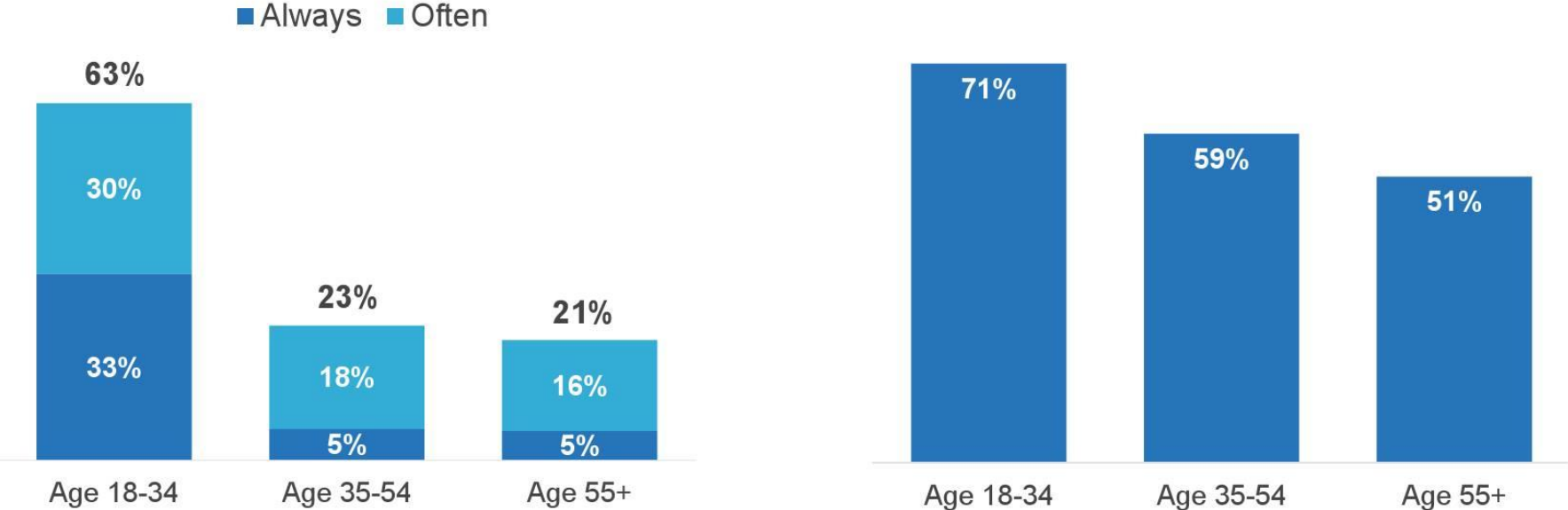
As the most permissive of push notifications, Millennials have only themselves to blame for their high level of annoyance at receiving them

**% of Smartphone Users by Age Segment**

Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave

Q: How often do you agree to an app's request to allow push notifications?

Strongly Agree/Somewhat Agree\*: "I get annoyed when I get too many app notifications"



\* Represents the percentage of smartphone users who responded on a 5-point scale that they "Strongly Agree" or "Somewhat Agree" with the statements shown.

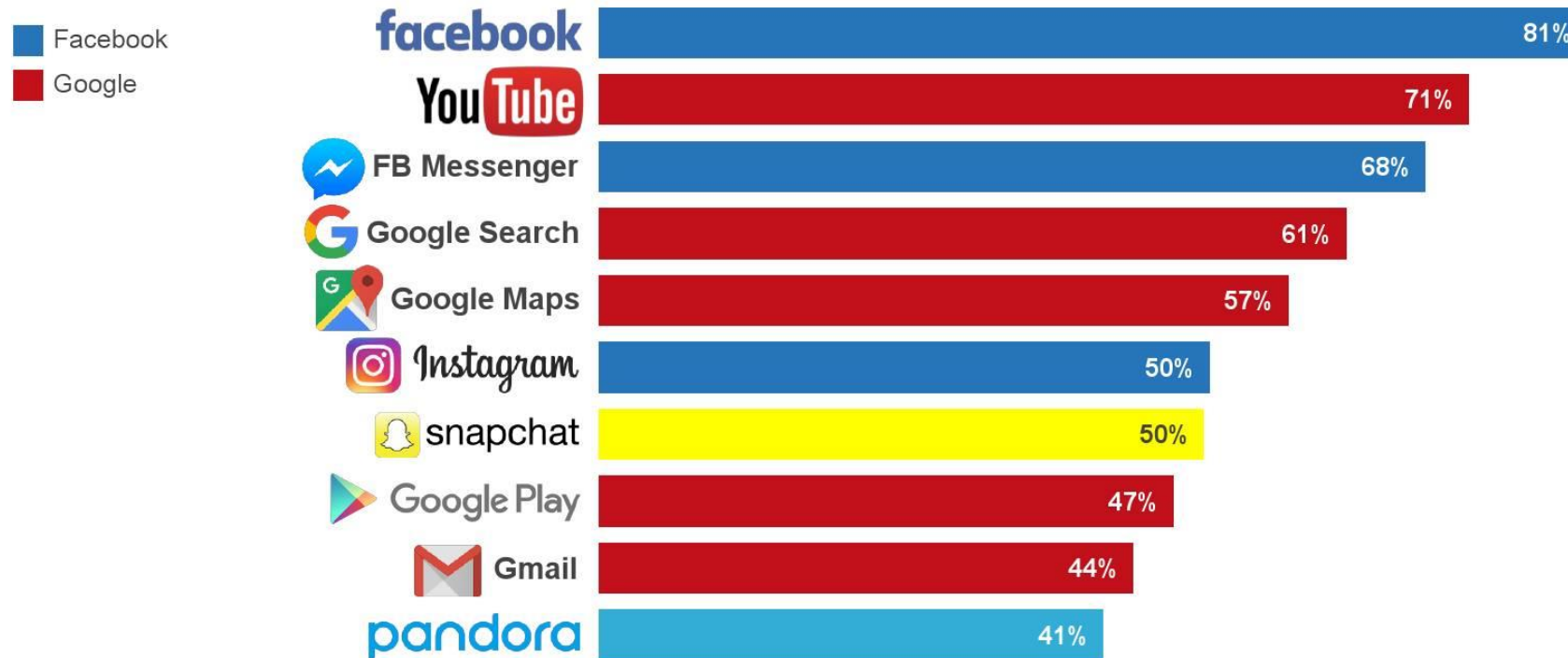
# Top & Fast-Growing Apps



Facebook and Google own the top 6 – and 8 of the top 10 – most used apps, with Snapchat and Pandora rounding out the ranking

### Top 10 Mobile Apps by Penetration of App Audience

Source: comScore Mobile Metrix, U.S., Age 18+, June 2017

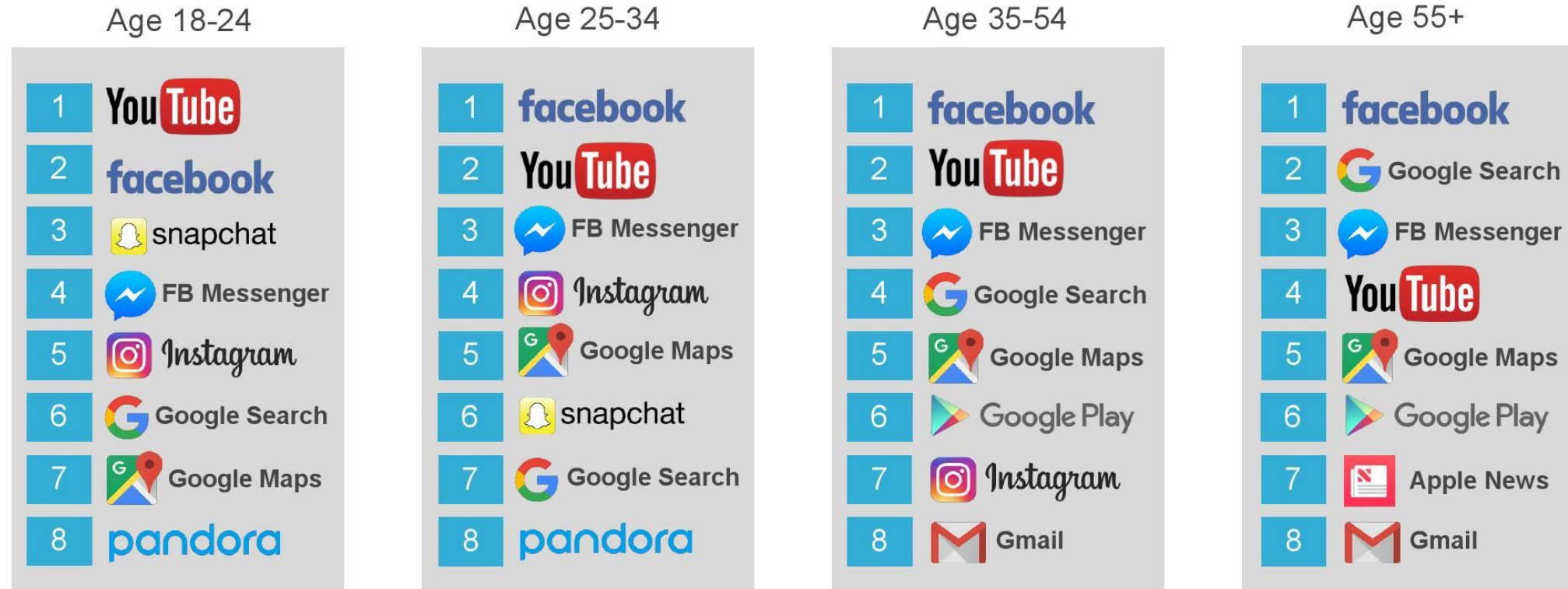


# Facebook maintains its position as the #1 app in monthly users



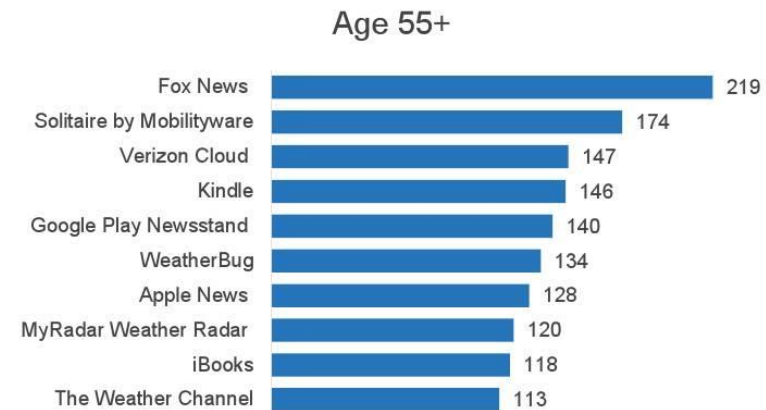
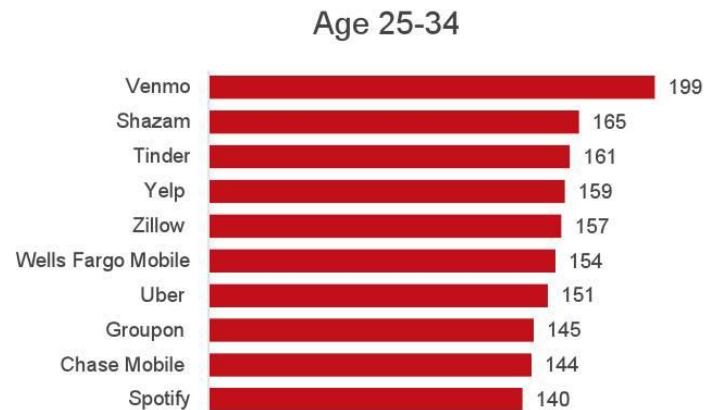
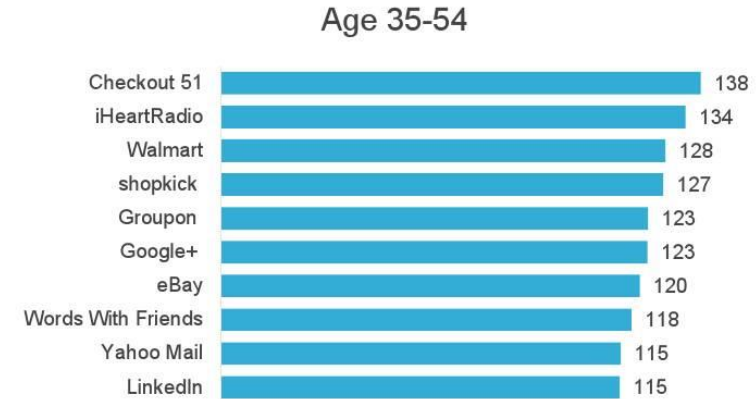
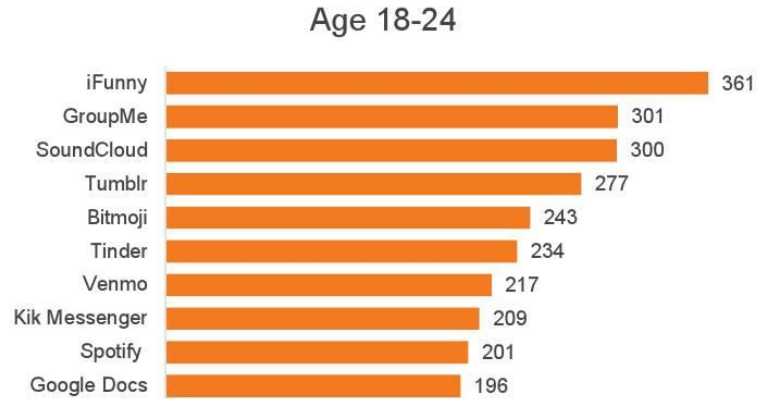
# The top apps vary by age group, with YouTube and Snapchat ranking higher on the list among younger Millennials

**Top Apps by Unique Visitors**  
Source: comScore Mobile Metrix, U.S., Age 18+, June 2017



# The top indexing apps by age segment reveals social and entertainment affinity among younger adults, and news and retail affinity among older adults

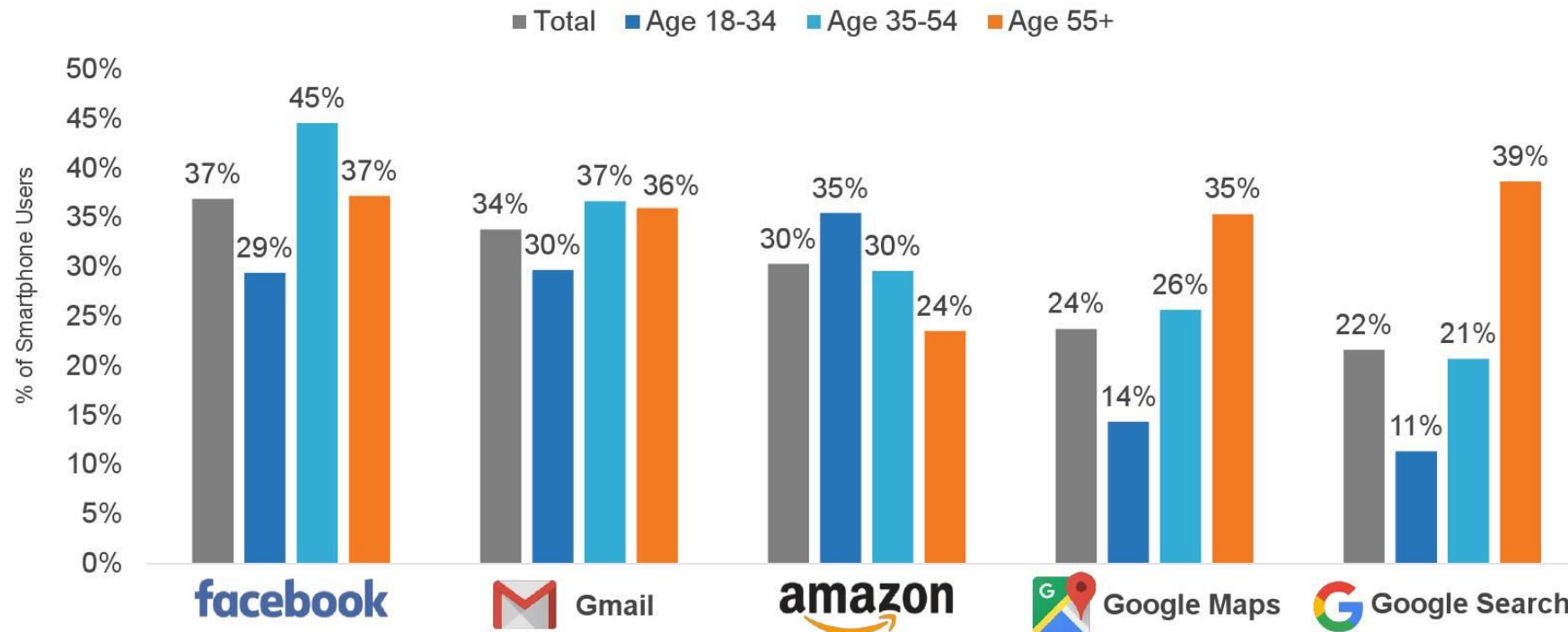
**Top Indexing Apps\* by Age Segment**  
 Source: comScore Mobile Metrix, U.S., Age 18+, June 2017



# Smartphone users are most likely to select Facebook as their 'most essential' app, but otherwise favor functional apps over entertainment

### Top Apps Smartphone Users 'Cannot Go Without' by Age Segment

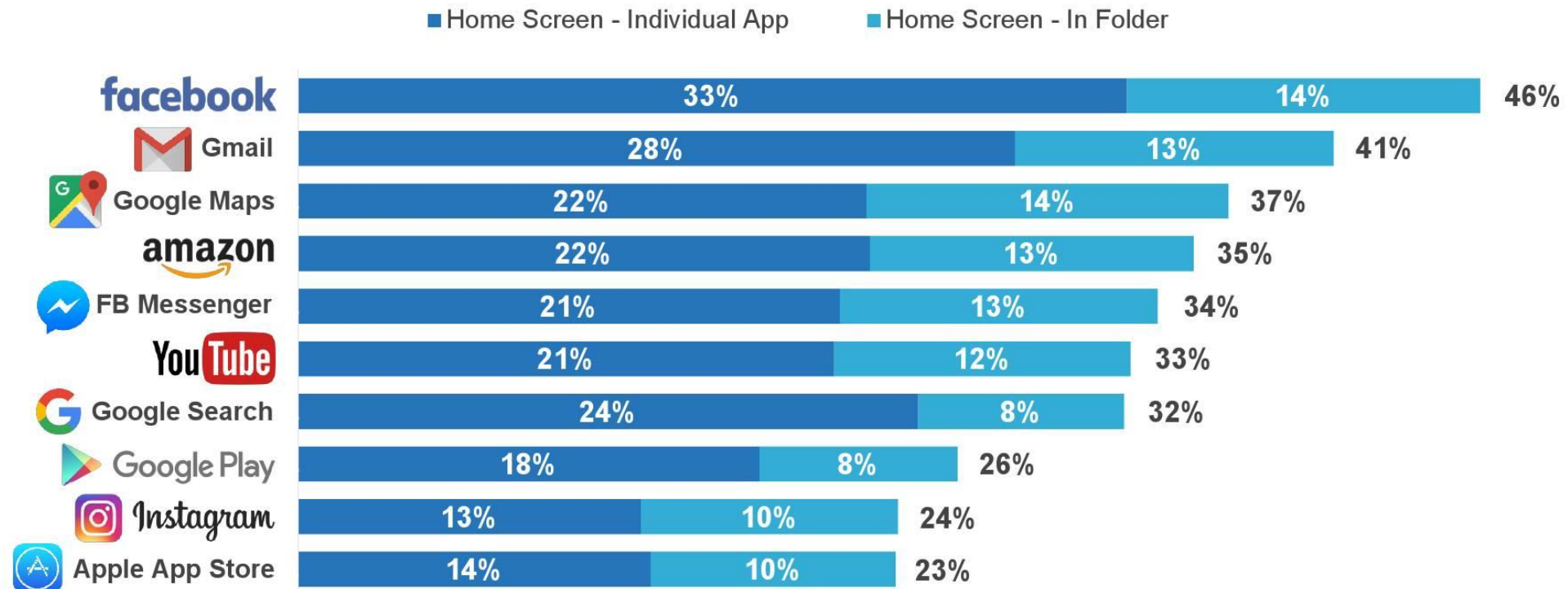
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



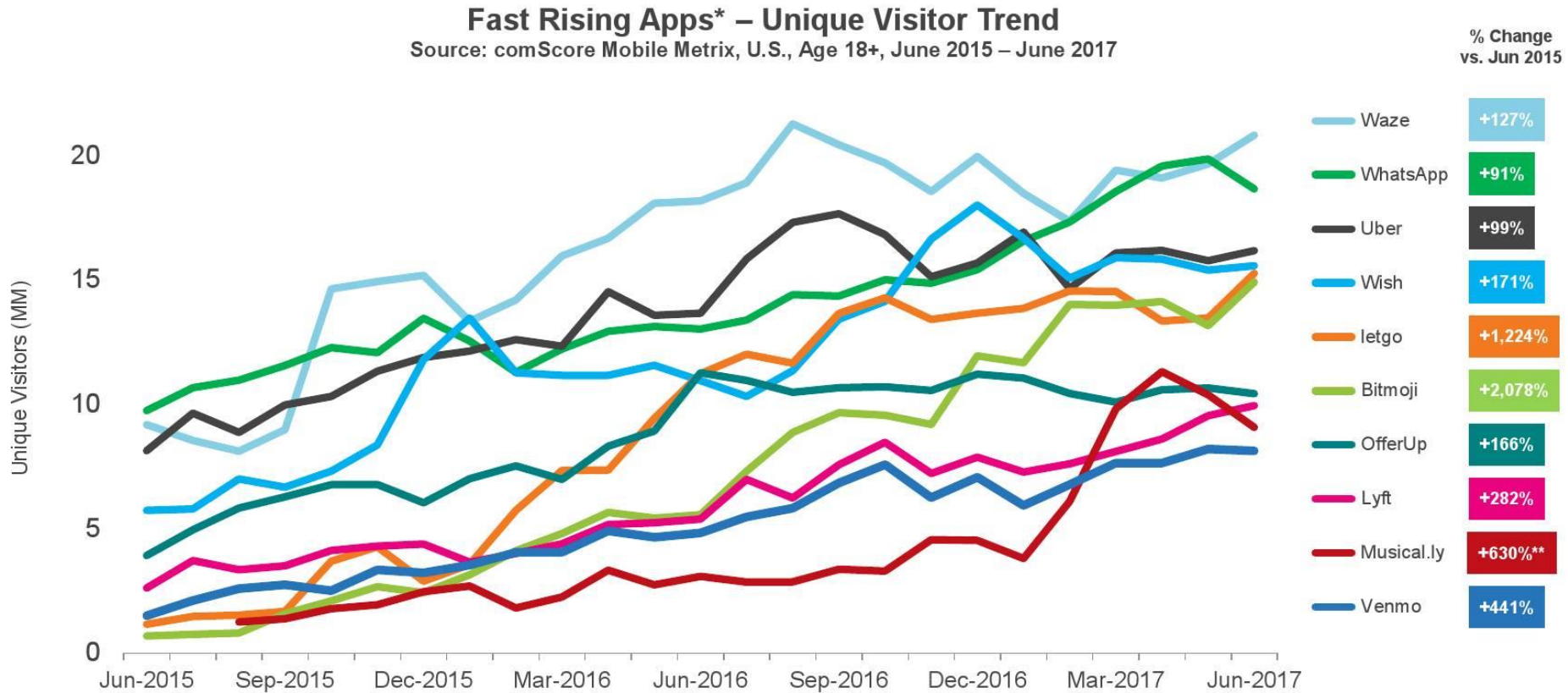
Facebook is also the most likely app to be positioned on smartphone users' home screens for easy access

### Top Apps by Home Screen Incidence - % Share of Smartphone Users

Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



Many of today's most prominent fast-growing apps are marketplaces or services that are thriving due to network effects



\* Based on a selection of apps with at least 5 million monthly visitors growing at very strong rates over the past two years.

\*\* Musical.ly's percent change figure represents its app audience growth from August 2015 to June 2016.

Consumers reported a wide variety of apps when asked what app they considered their 'hidden gem'





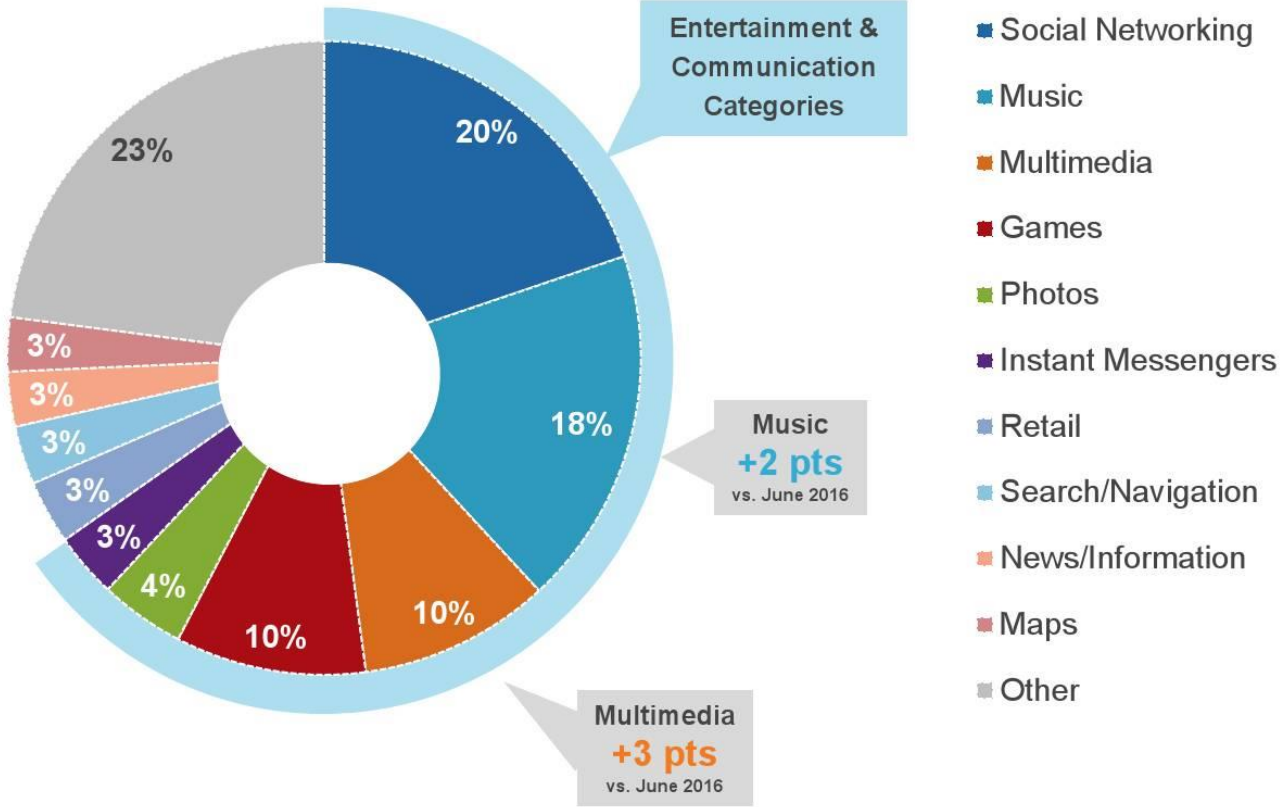
# App Content Categories



The top 6 categories representing nearly 2/3<sup>rds</sup> of time spent on apps are entertainment or communication-focused

### Share of Mobile App Time Spent by Content Category

Source: comScore Mobile Metrix, U.S., Age 18+, June 2017



# Social Networking Apps: Category Snapshot



## App User Penetration

% Reach of Total App Audience

93%

## #1 Ranked App

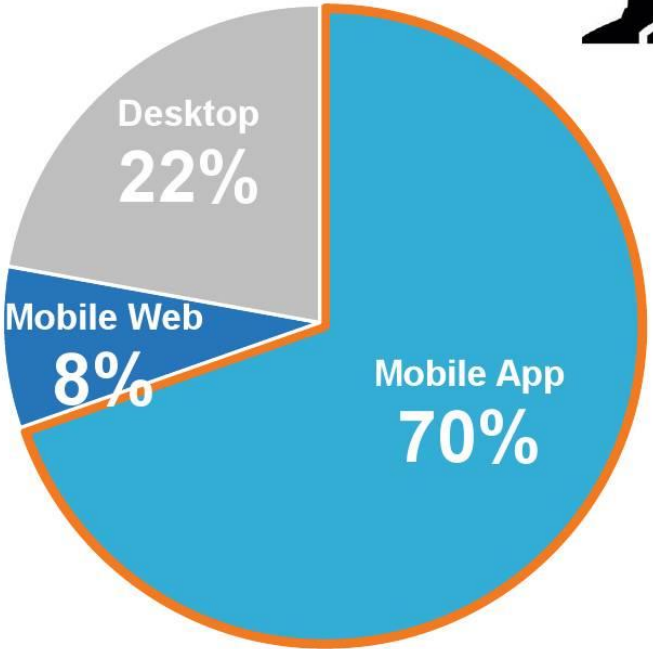
by Unique Visitors



Facebook

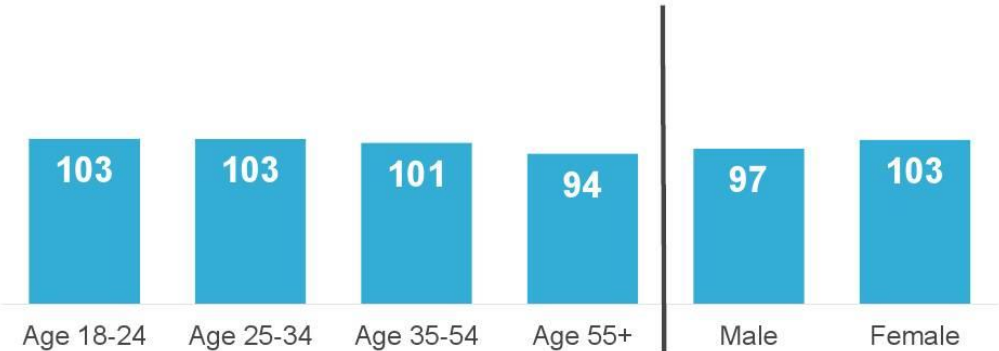
## Usage Breakdown

by Share of Category's Total Digital Time Spent



## Demographic Profile

Index of Category vs. Total App Audience



# News Apps: Category Snapshot



## App User Penetration

% Reach of Total App Audience

77%

## #1 Ranked App

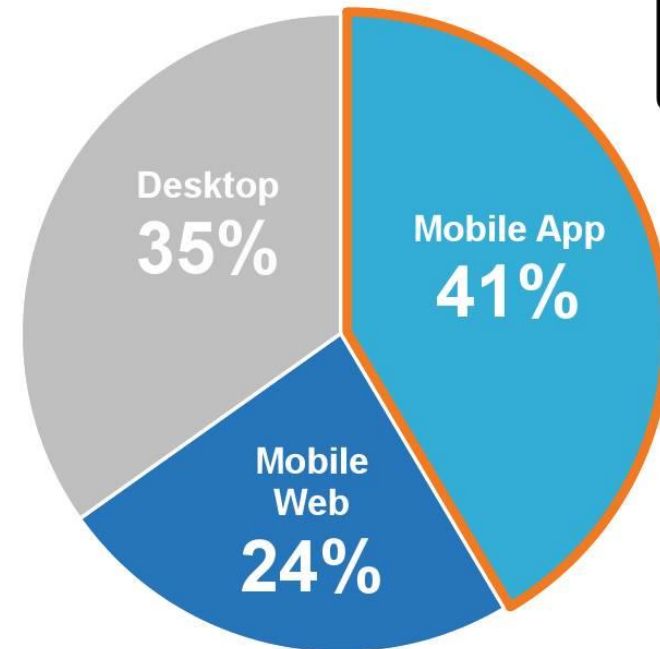
by Unique Visitors



Apple News

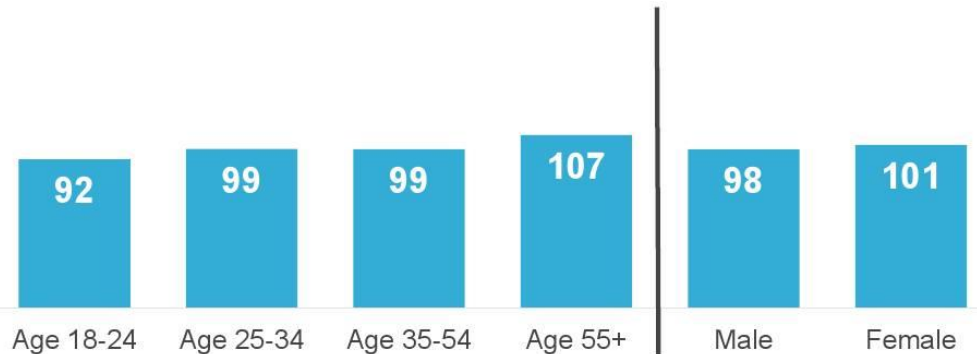
## Usage Breakdown

by Share of Category's Total Digital Time Spent



## Demographic Profile

Index of Category vs. Total App Audience



# Retail Apps: Category Snapshot



## App User Penetration

% Reach of Total App Audience

# 75%

## #1 Ranked App

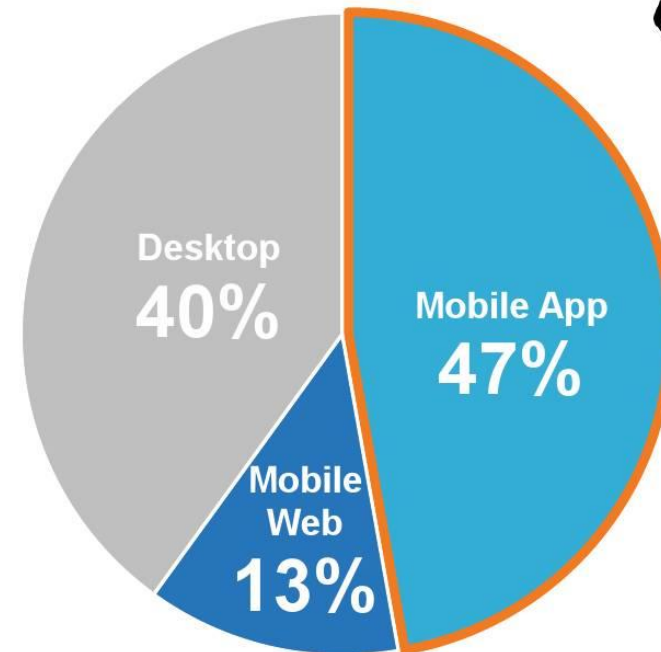
by Unique Visitors



Amazon

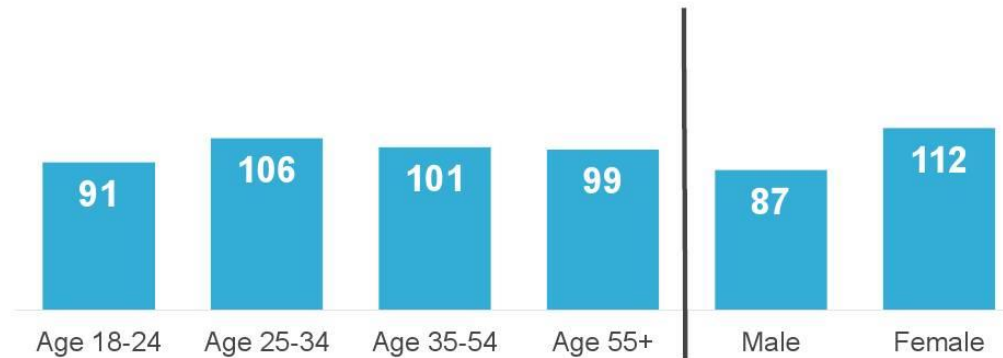
## Usage Breakdown

by Share of Category's Total Digital Time Spent



## Demographic Profile

Index of Category vs. Total App Audience



# Gaming Apps: Category Snapshot



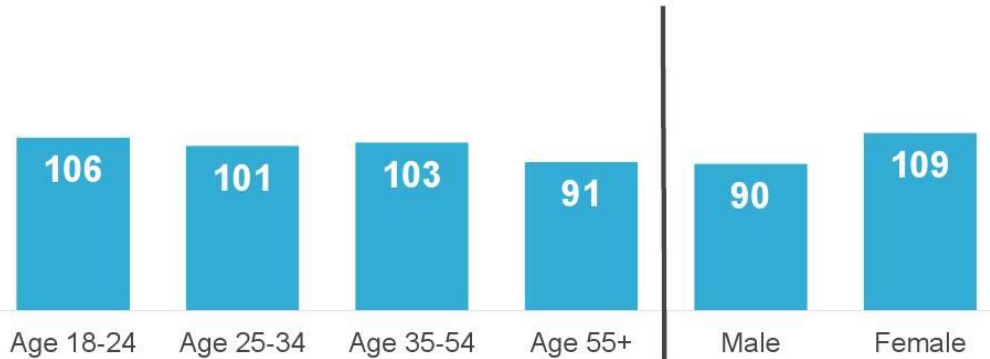
## App User Penetration

% Reach of Total App Audience

67%

## Demographic Profile

Index of Category vs. Total App Audience



## #1 Ranked App

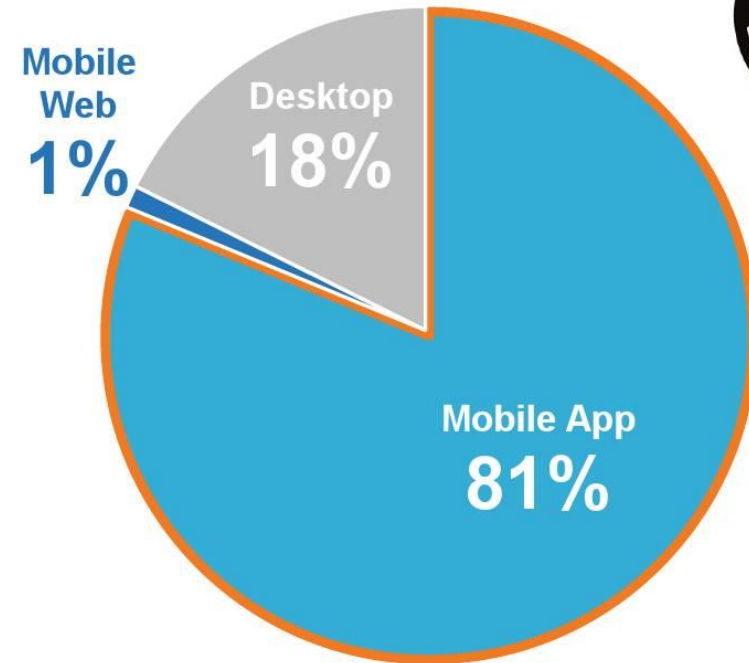
by Unique Visitors



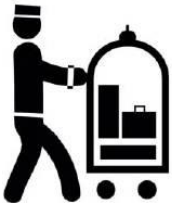
Words With Friends

## Usage Breakdown

by Share of Category's Total Digital Time Spent



# Travel Apps: Category Snapshot



## App User Penetration

% Reach of Total App Audience

**27%**

## #1 Ranked App

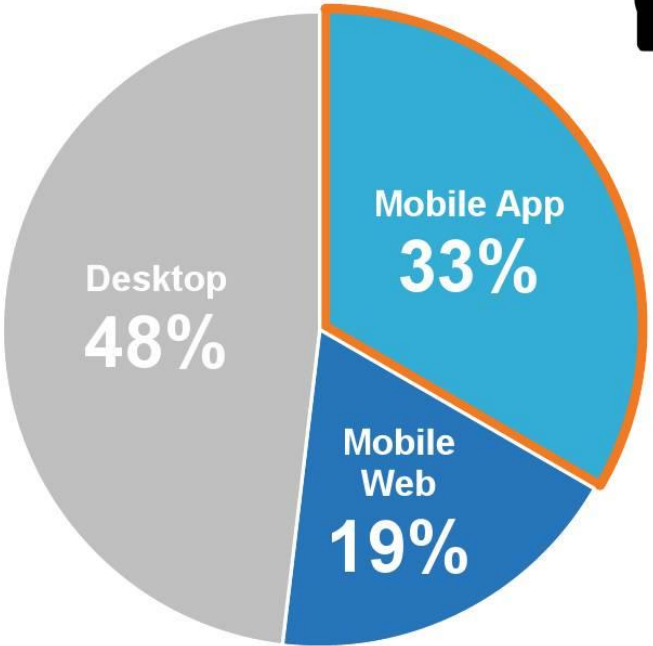
by Unique Visitors



Uber

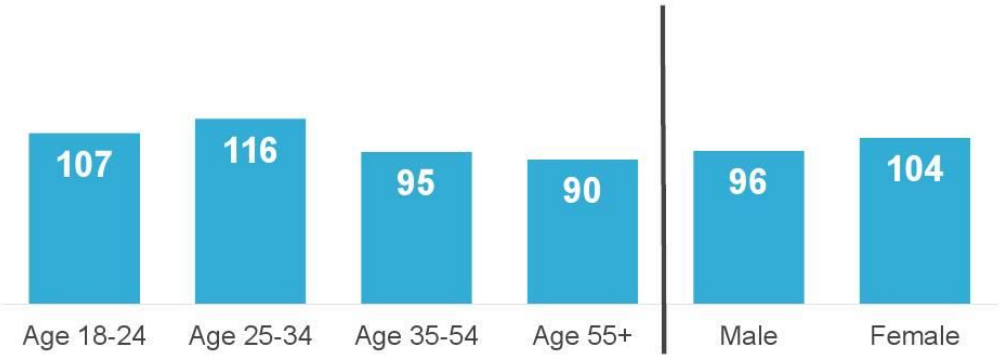
## Usage Breakdown

by Share of Category's Total Digital Time Spent



## Demographic Profile

Index of Category vs. Total App Audience



# Sports Apps: Category Snapshot



## App User Penetration

% Reach of Total App Audience

**23%**

## #1 Ranked App

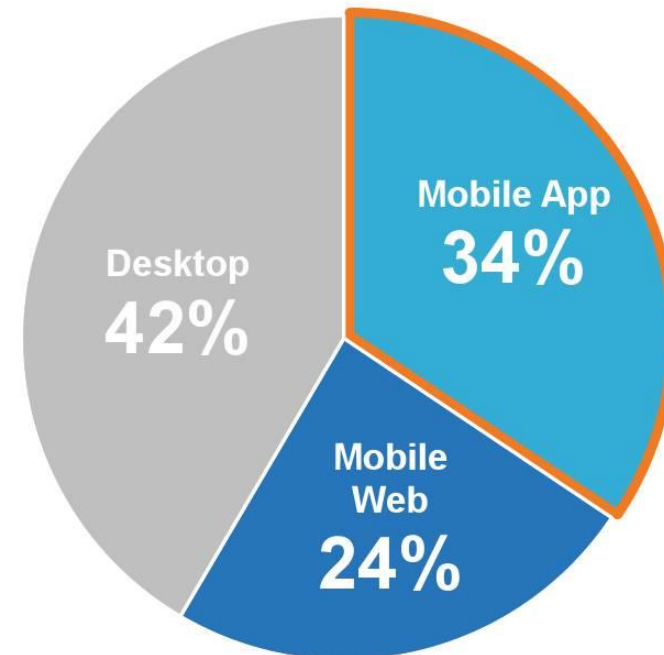
by Unique Visitors



ESPN

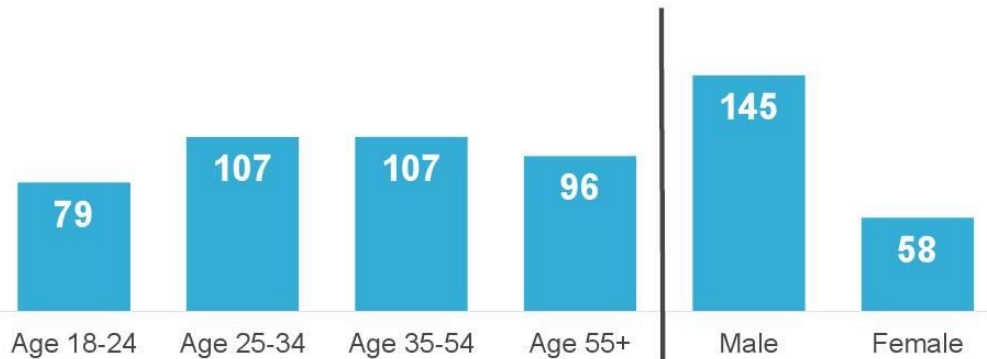
## Usage Breakdown

by Share of Category's Total Digital Time Spent



## Demographic Profile

Index of Category vs. Total App Audience





# Dating Apps: Category Snapshot

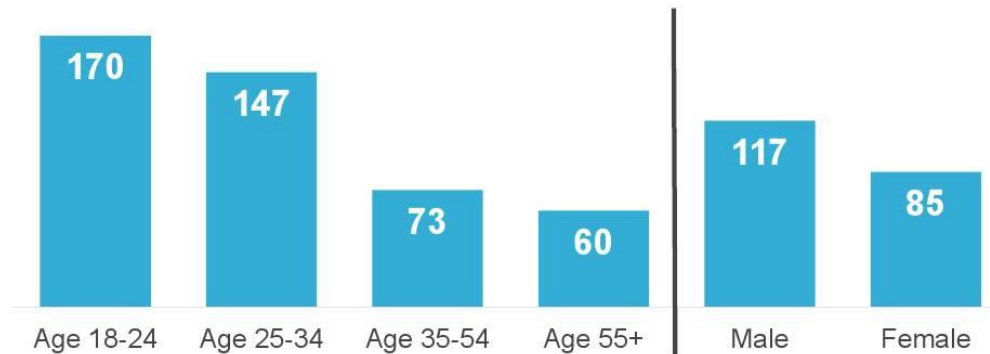
## App User Penetration

% Reach of Total App Audience

11%

## Demographic Profile

Index of Category vs. Total App Audience



## #1 Ranked App

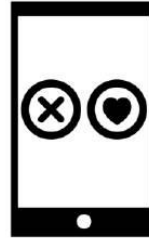
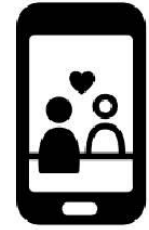
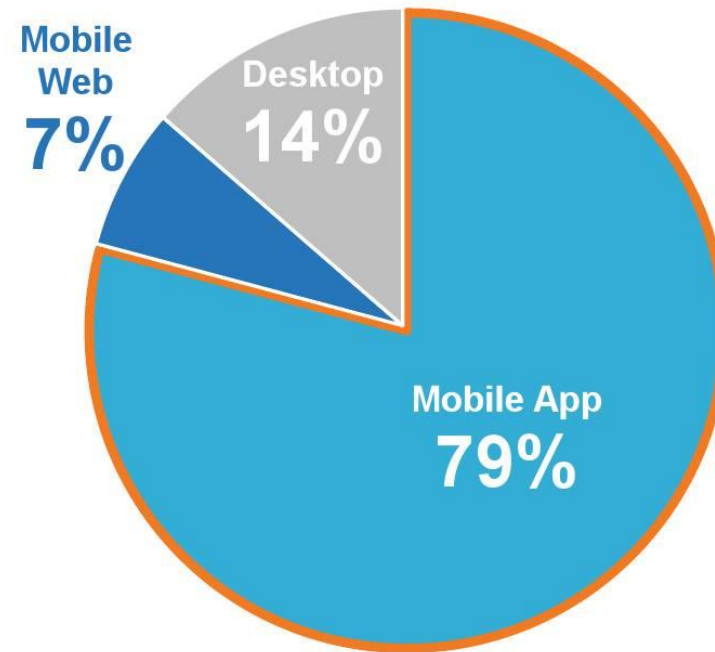
by Unique Visitors



Tinder

## Usage Breakdown

by Share of Category's Total Digital Time Spent



# Summary & Key Findings

# Key Takeaways

1

**Mobile Apps are the primary driver of digital media consumption but activity is concentrated**

- The average user spends 2.3 hours per day using mobile apps
- Apps dominate mobile web in usage time, 87% to 13%
- Half of digital media time spent occurs in smartphone apps
- Smartphone users' #1 app drives half of their app time, and the Top 10 drive 95%+
- Apps have a shorter long-tail for usage compared to the web, with less than 30% of app time occurring outside the Top 50

2

**More signs of having reached 'peak app' are emerging as interest in new apps begins to wane**

- Many app acquisition methods are seeing modest declines over the past year
- The majority of app users don't download any apps per month
- Most app users across all age segments access 20 or fewer apps in a month
- While many fast growing apps still exist, fewer apps have emerged of late to revolutionize the digital landscape

3

**Millennials prove to be the most engaged, sophisticated and addicted users of apps**

- Millennials are more likely to engage in curation of apps by location and accessibility on their home screens
- While they love social and entertainment apps, they are also extremely reliant on more functional apps
- They can't live without their apps, but also show signs of app fatigue



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