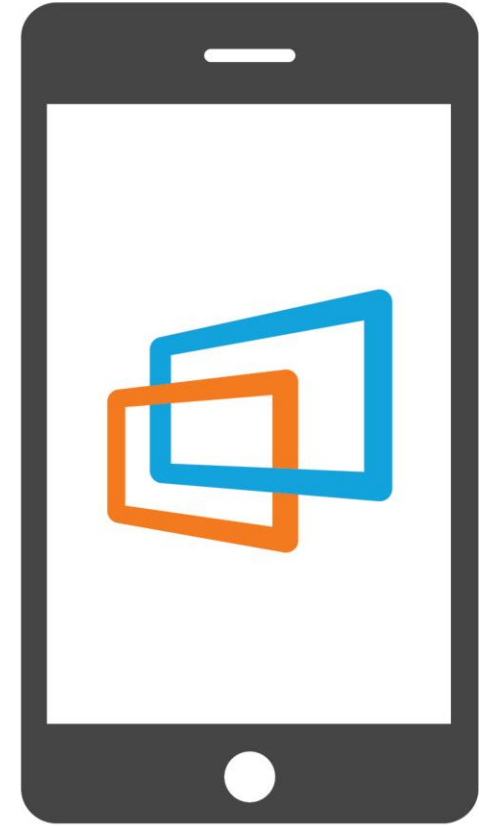


**THE 2017 U.S.**

# 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”.

For more information about subscribing to comScore services, please contact us at [www.comscore.com/learnmore](http://www.comscore.com/learnmore).

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## App Overview

## App Download Habits

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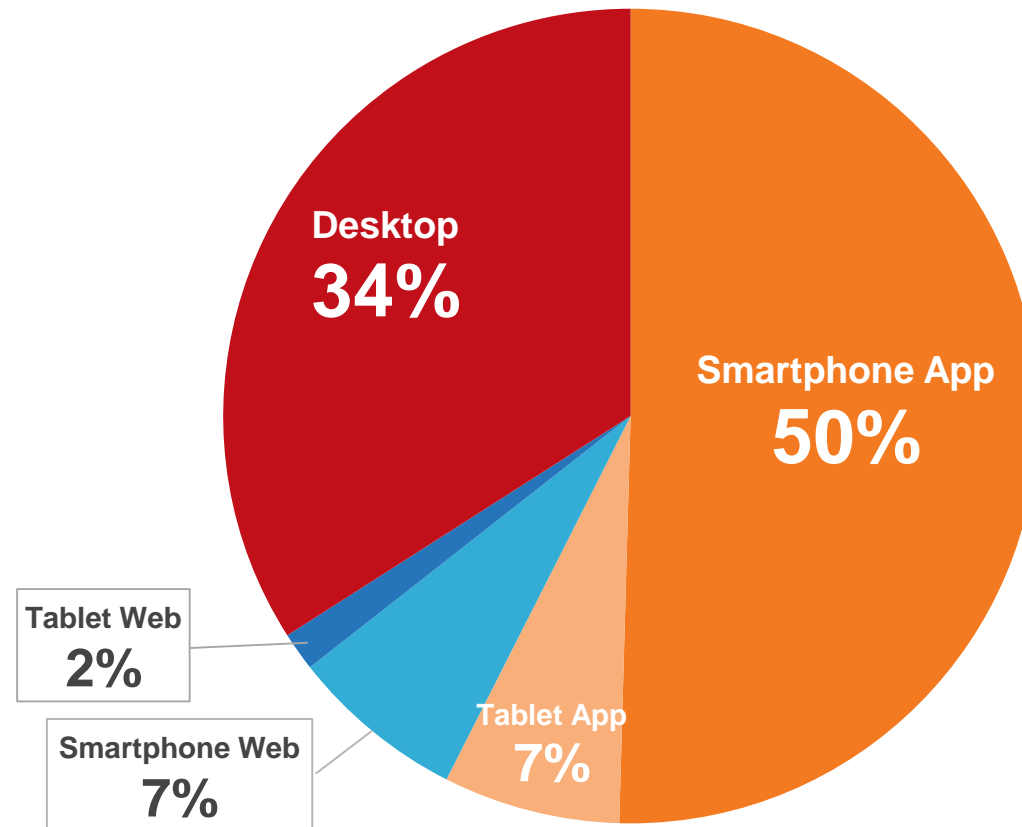
## Summary & Key Findings

# 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

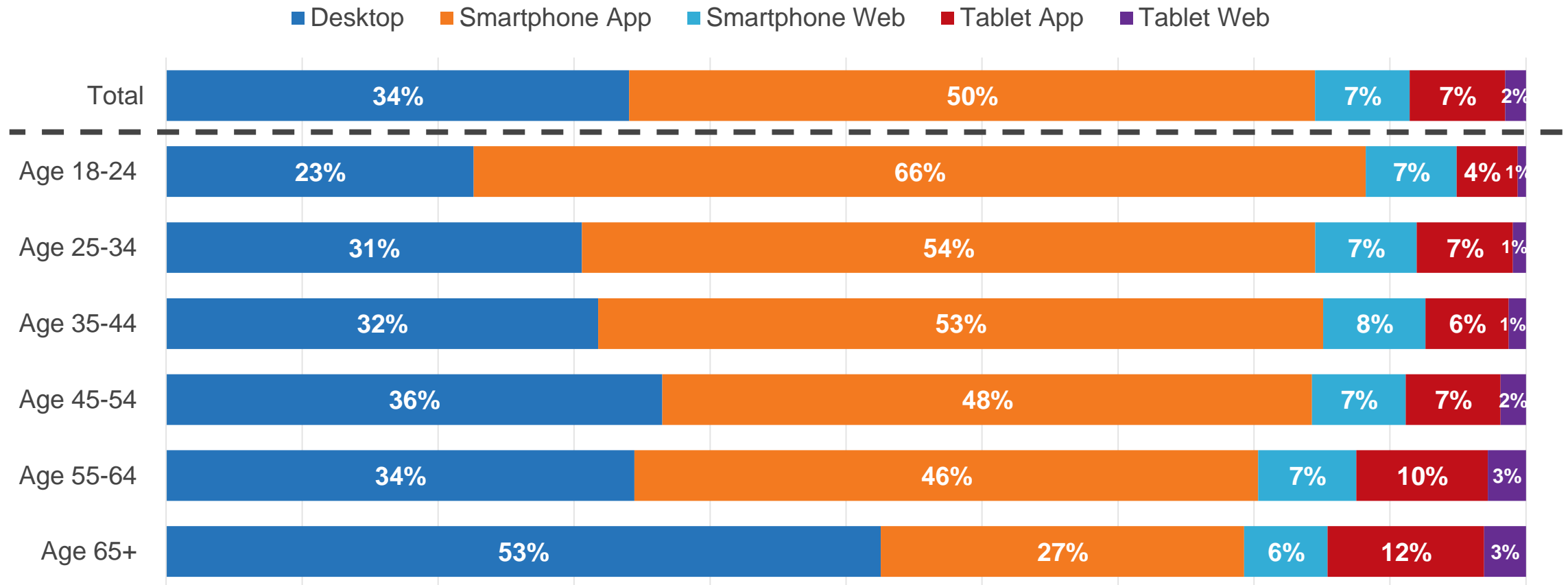
Source: comScore Media Metrix Multi-Platform & Mobile Metrix, U.S., Total Audience, June 2017



# 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

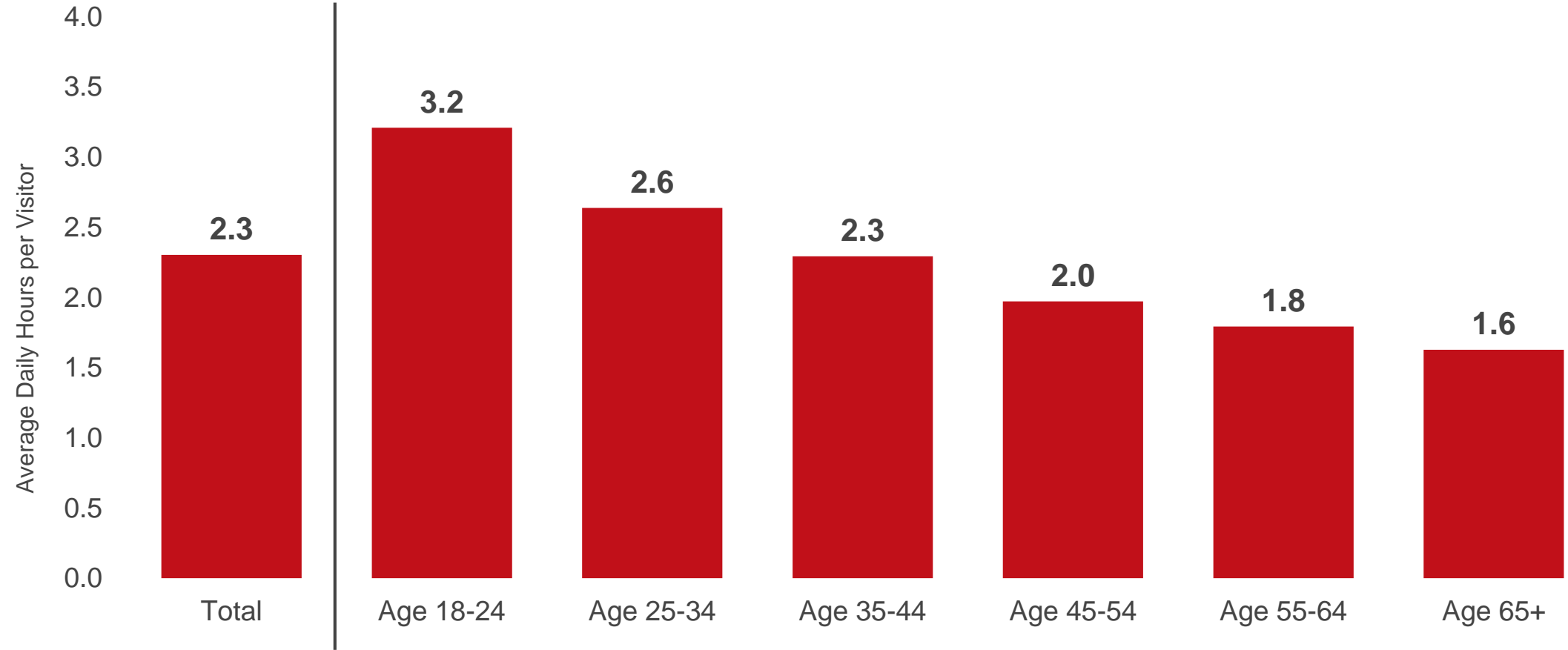
Source: comScore Media Metrix Multi-Platform & Mobile Metrix, U.S., Age 18+, June 2017



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

Average Daily Hours per Mobile App Visitor by Age

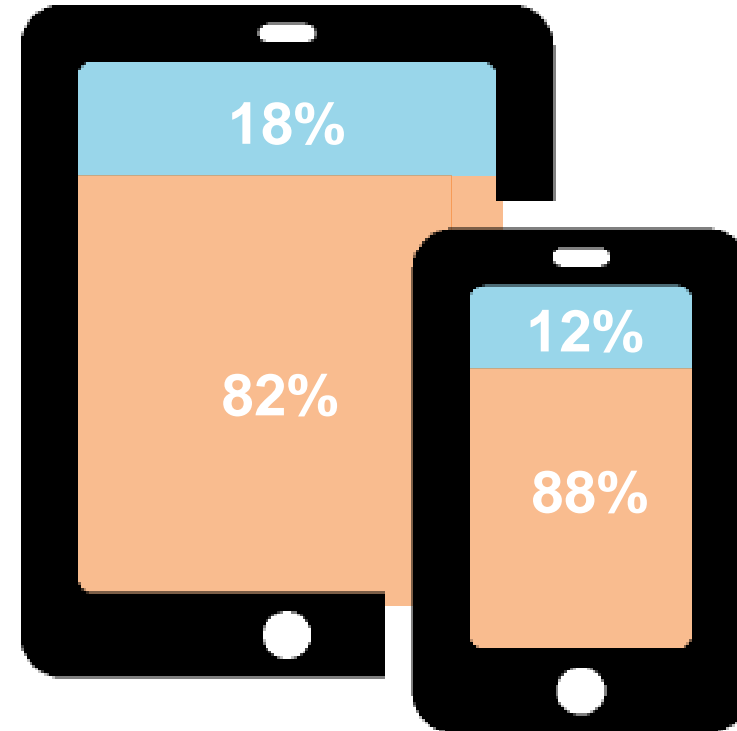
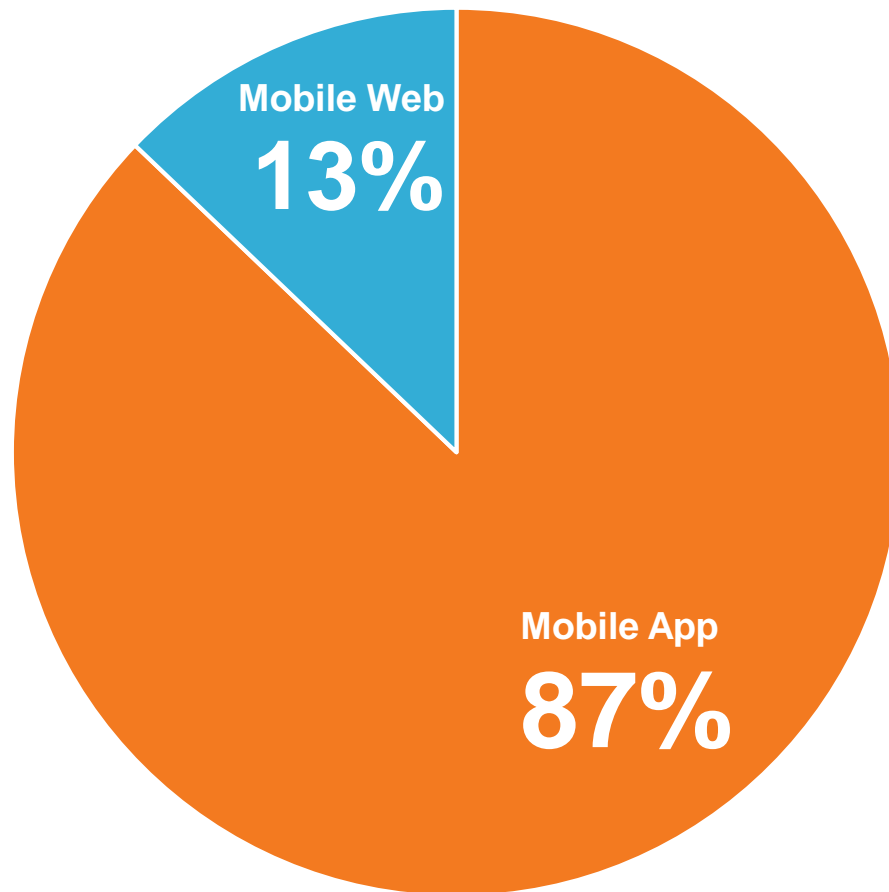
Source: comScore Mobile Metrix, U.S., Age 18+, June 2017



# 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

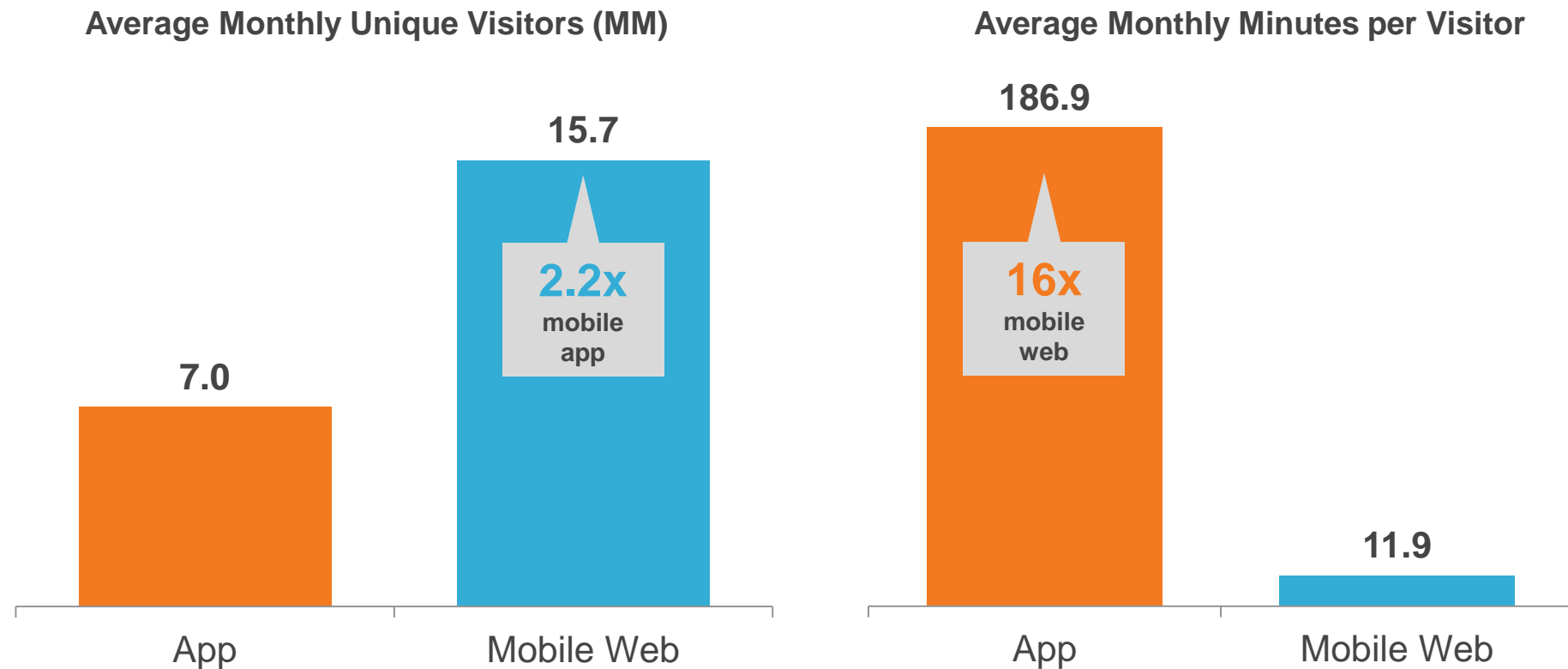




The average user spends 16x more time on the top apps than they do on the top mobile websites, but mobile web tends to capture larger audiences

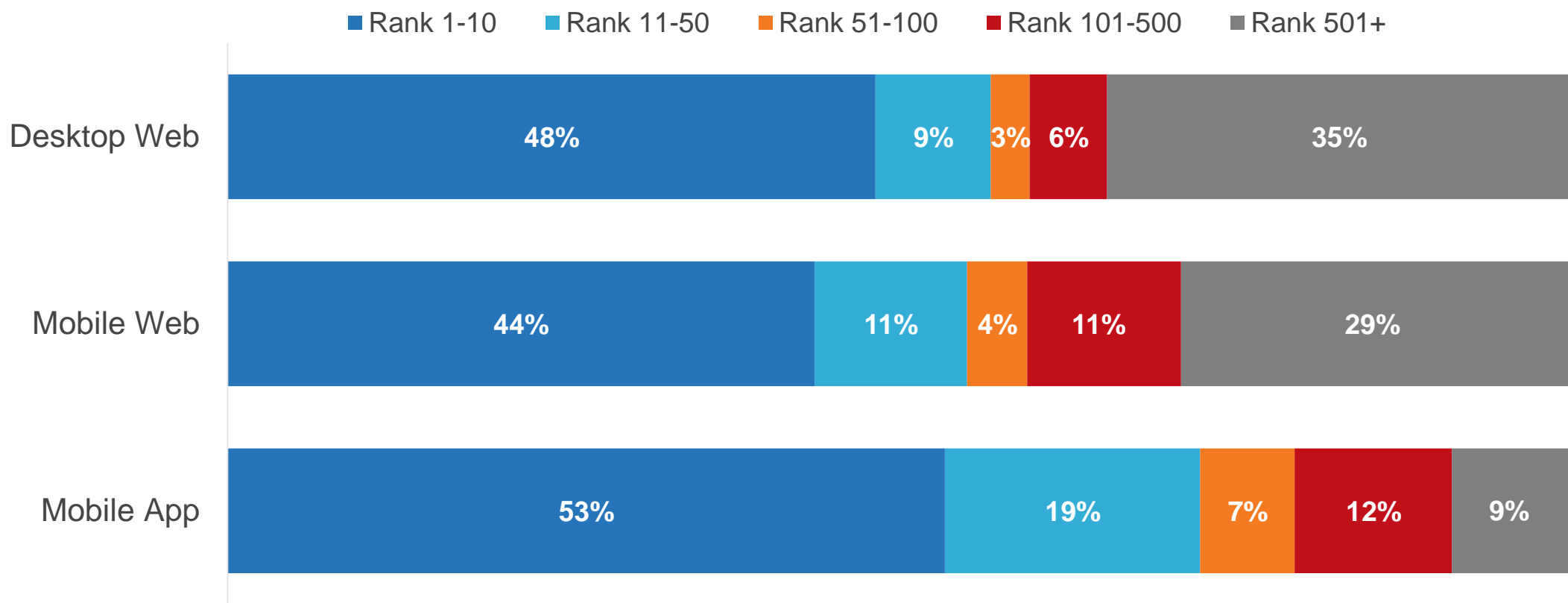
### Top 500 Mobile Apps vs. Top 500 Mobile Web Properties

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

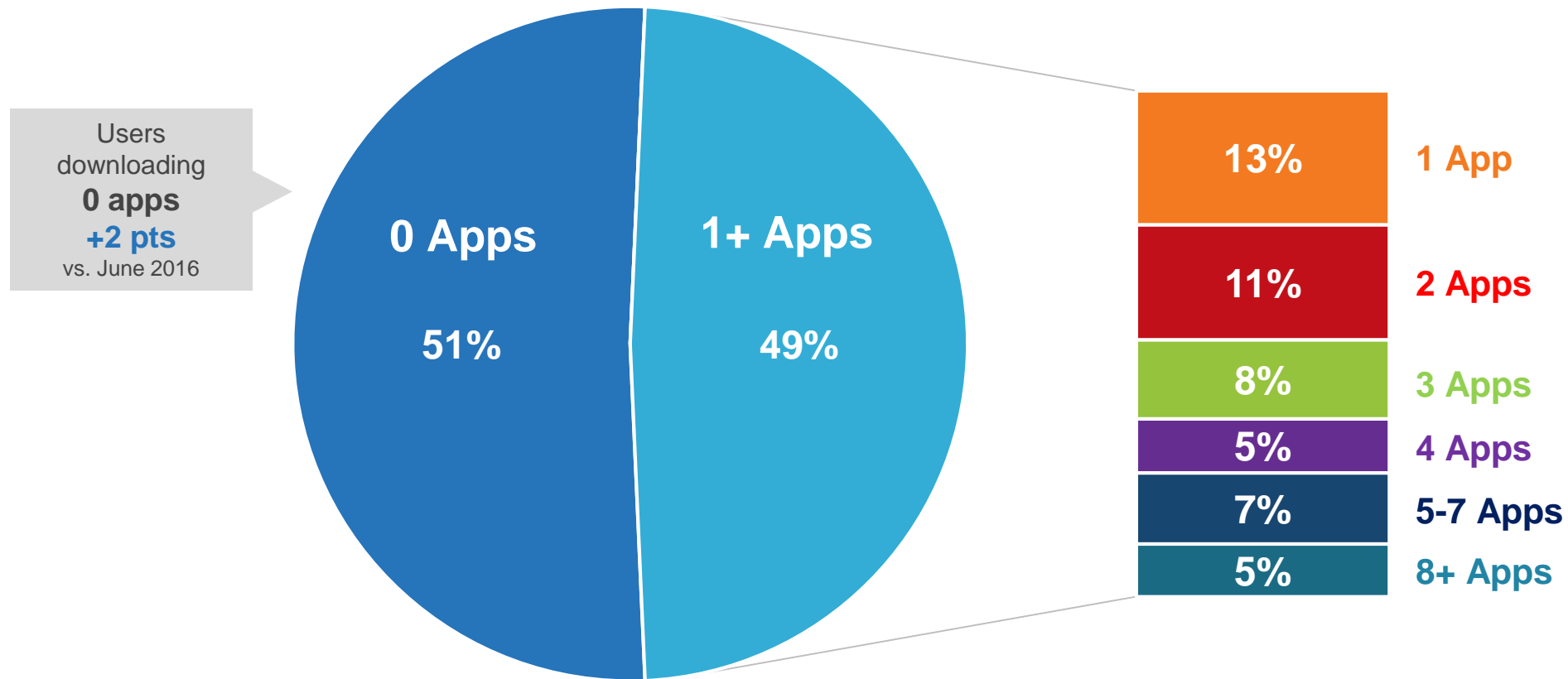


# App Download Habits

# 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

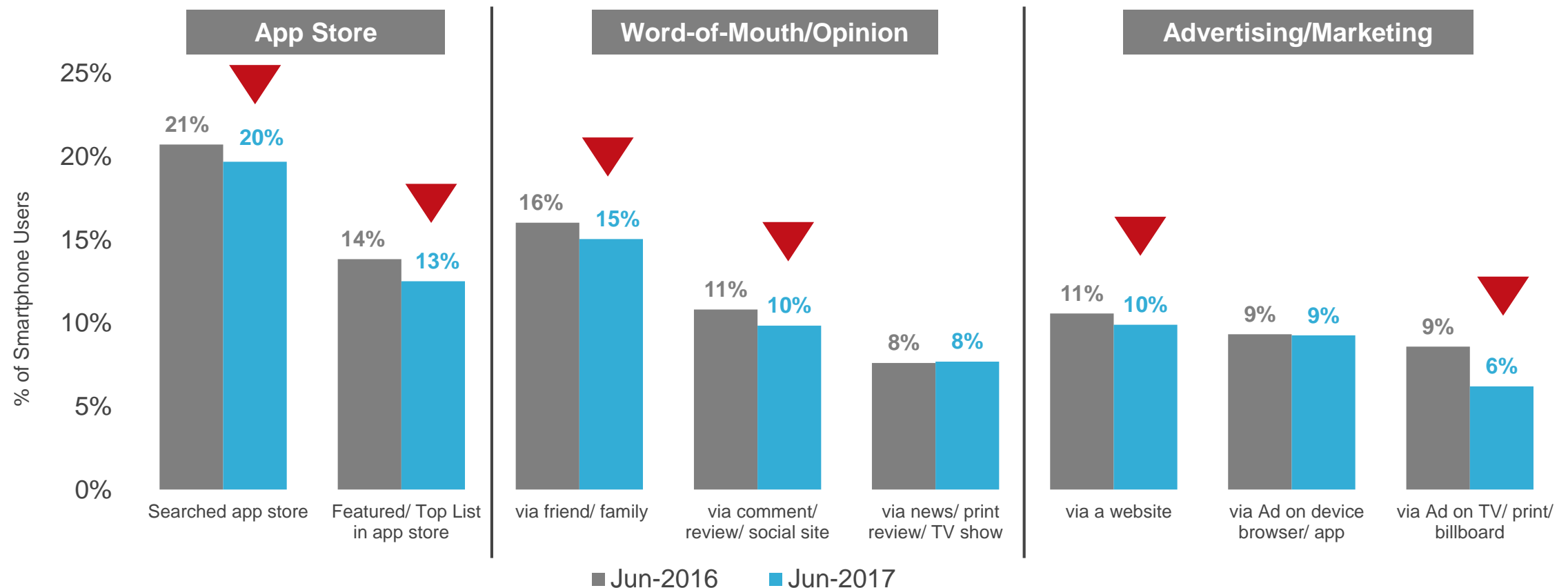
Source: comScore MobiLens, U.S., Age 13+, 3 Month Average Ending June 2017



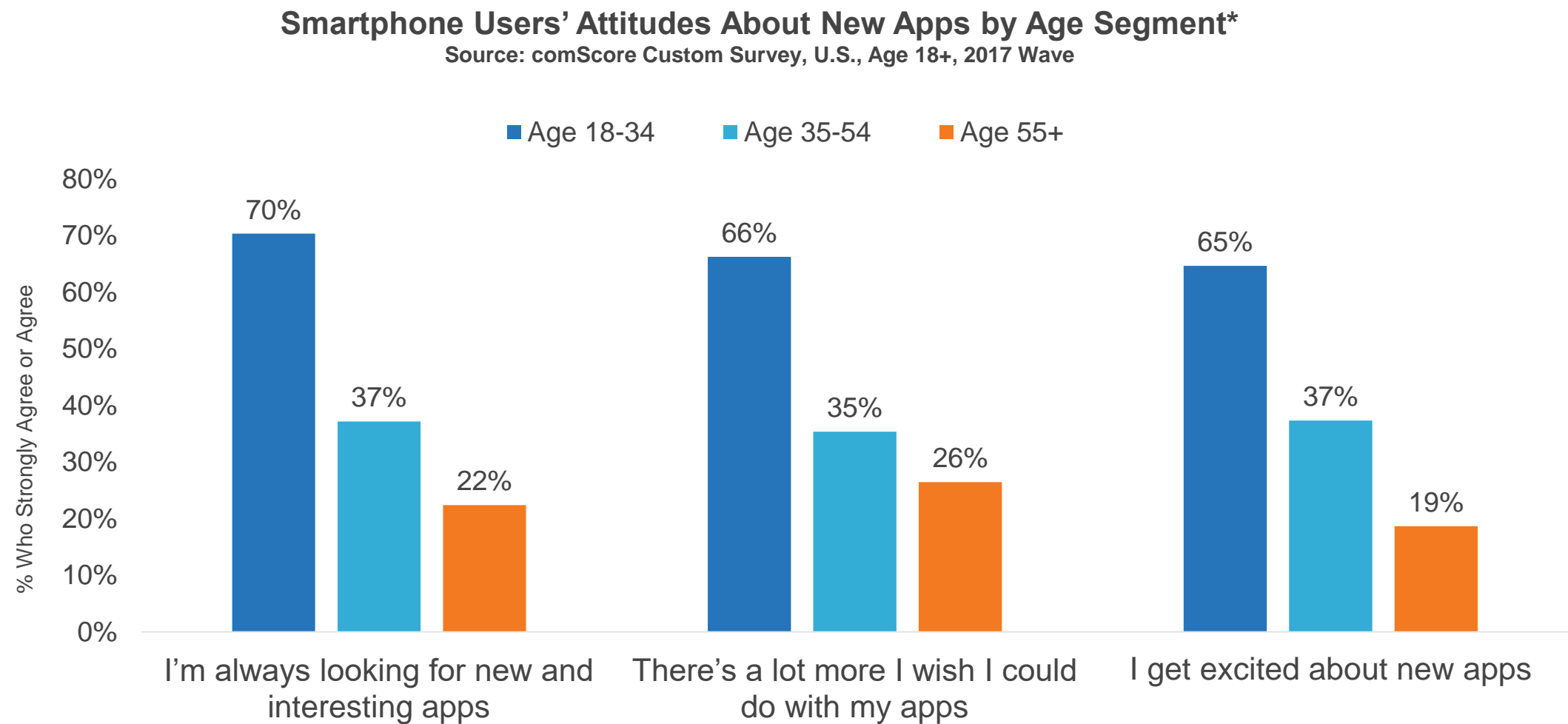
# App discovery is down across several channels, including the app store, word-of-mouth and advertising. Is interest in new apps waning?

## Most Common App Discovery Channels Among Smartphone Users

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



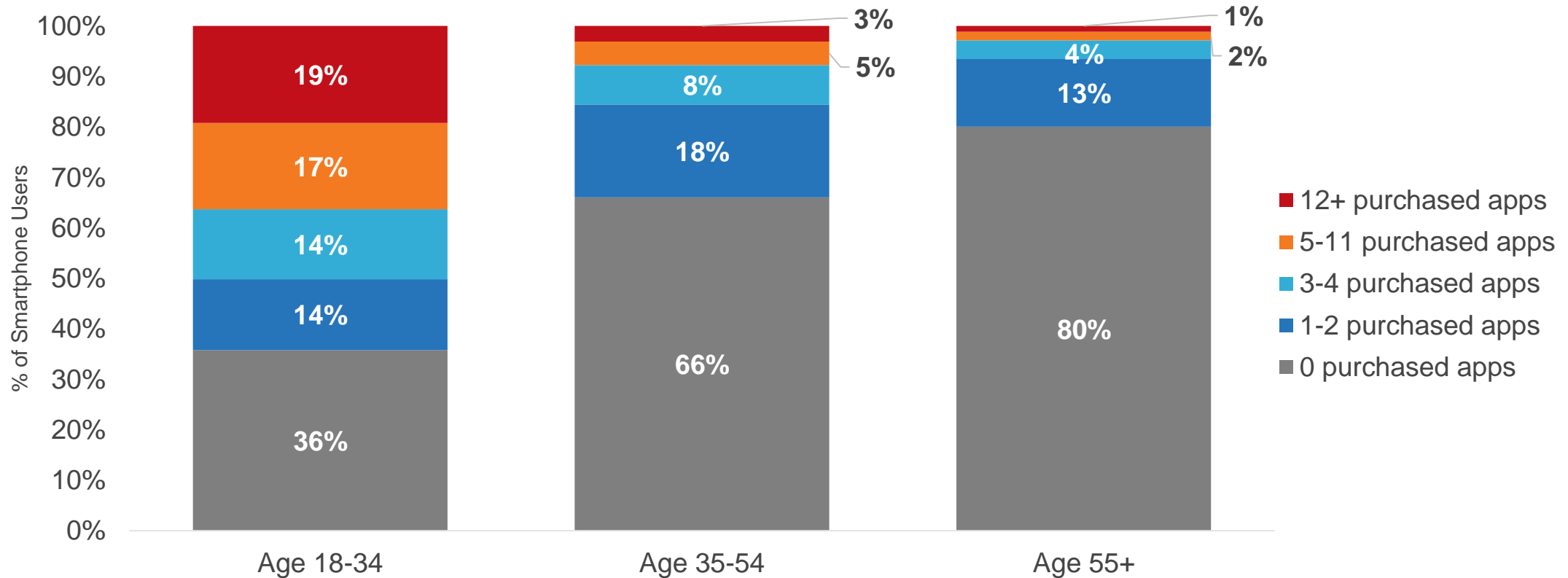
# Millennials still have a lot of excitement for new apps, but older smartphone users do not match Millennials' level of interest



# 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

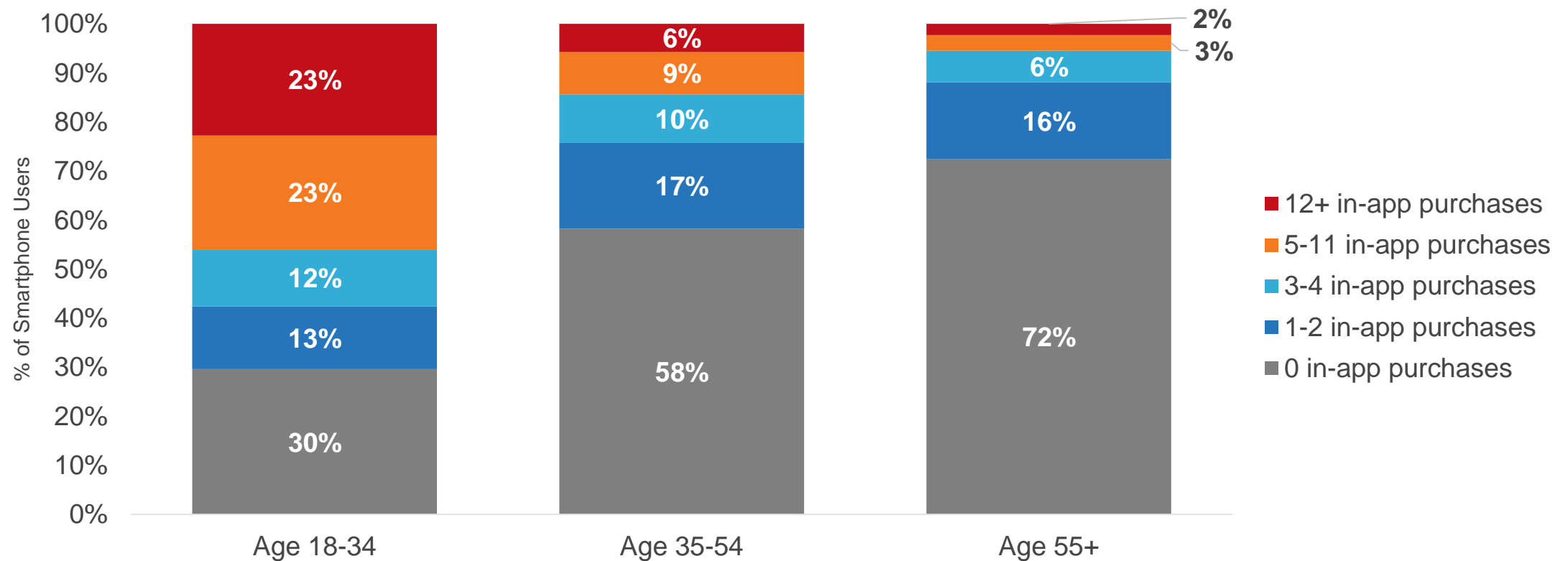
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



Millennials are also more willing to make purchases within an app, with nearly half making five or more in-app purchases annually

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

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

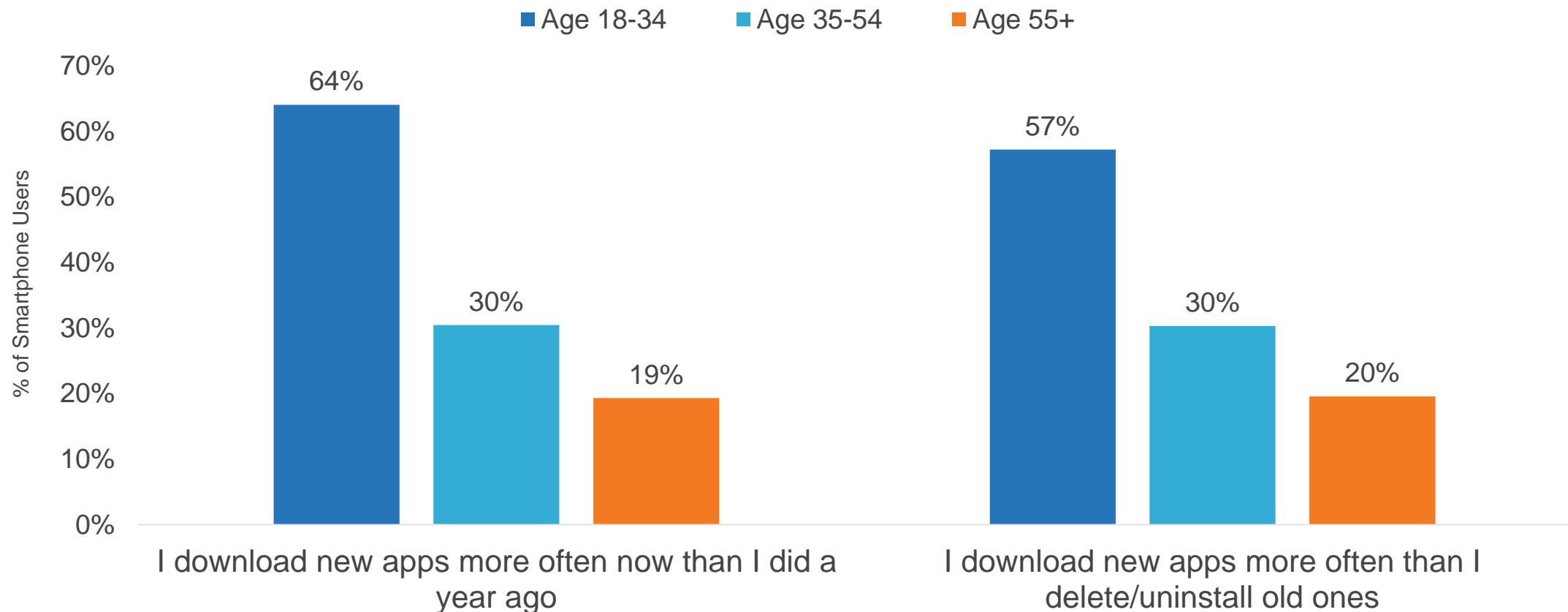




# Millennials are still adding apps often, but older smartphone users' download habits are losing steam and they may now be net app deleters

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

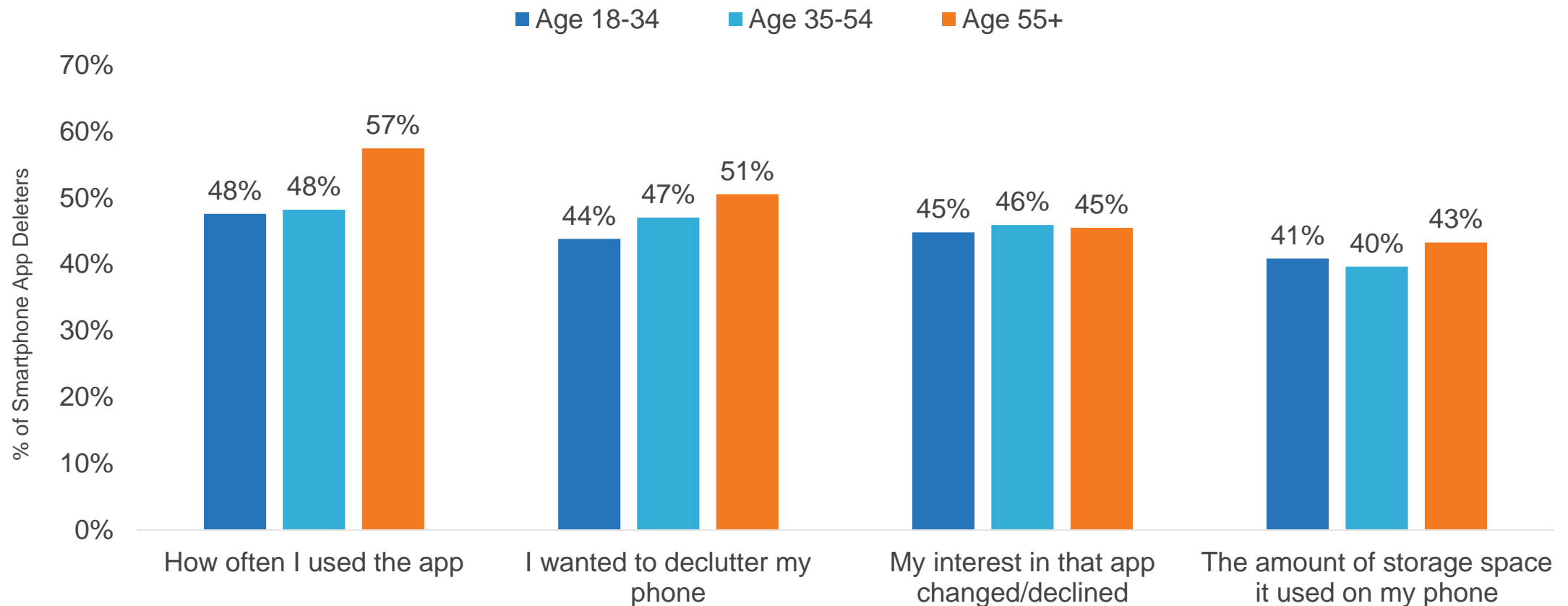
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



# 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\*

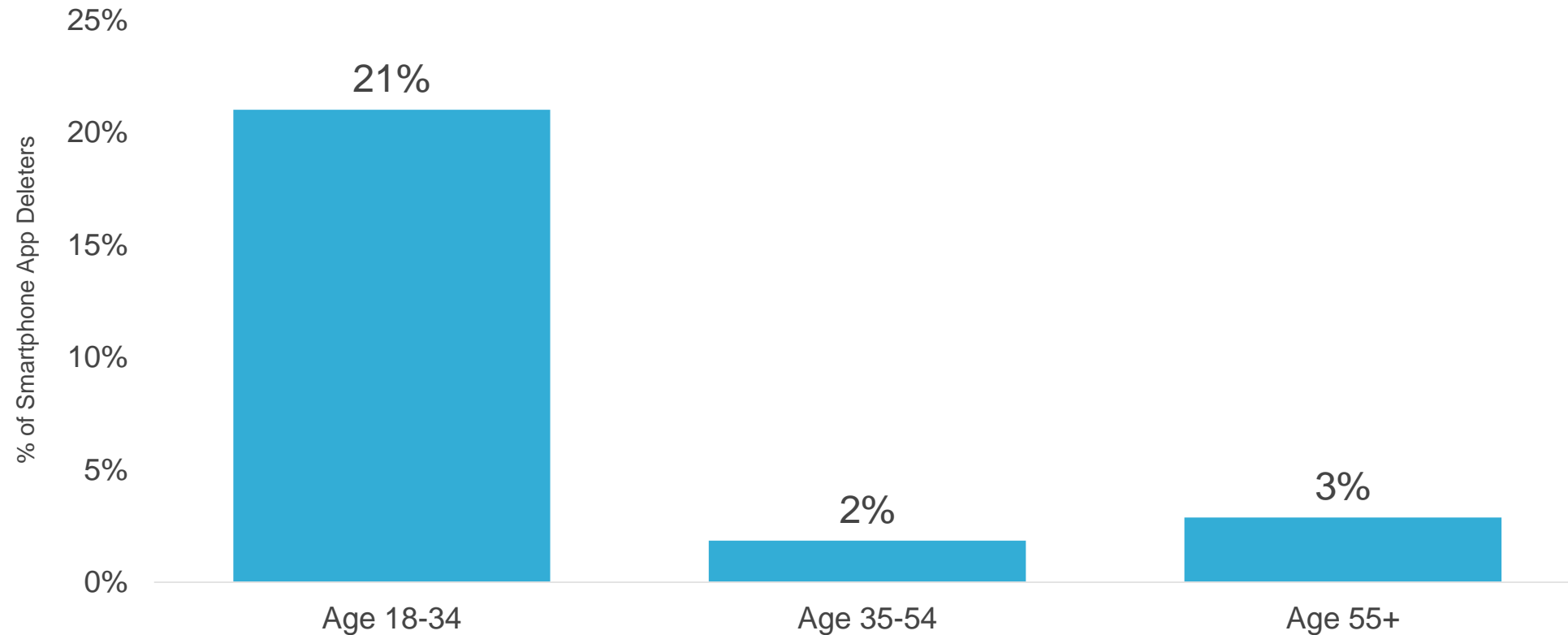
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



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

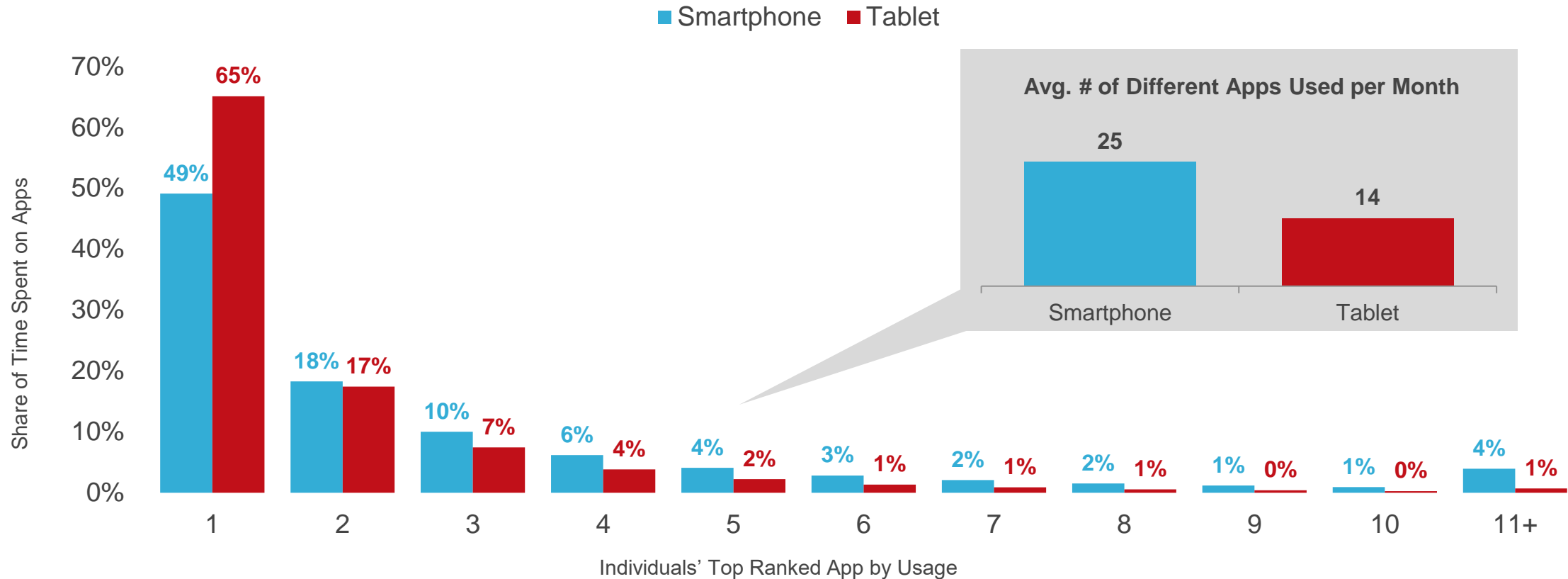


# App Usage Habits

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

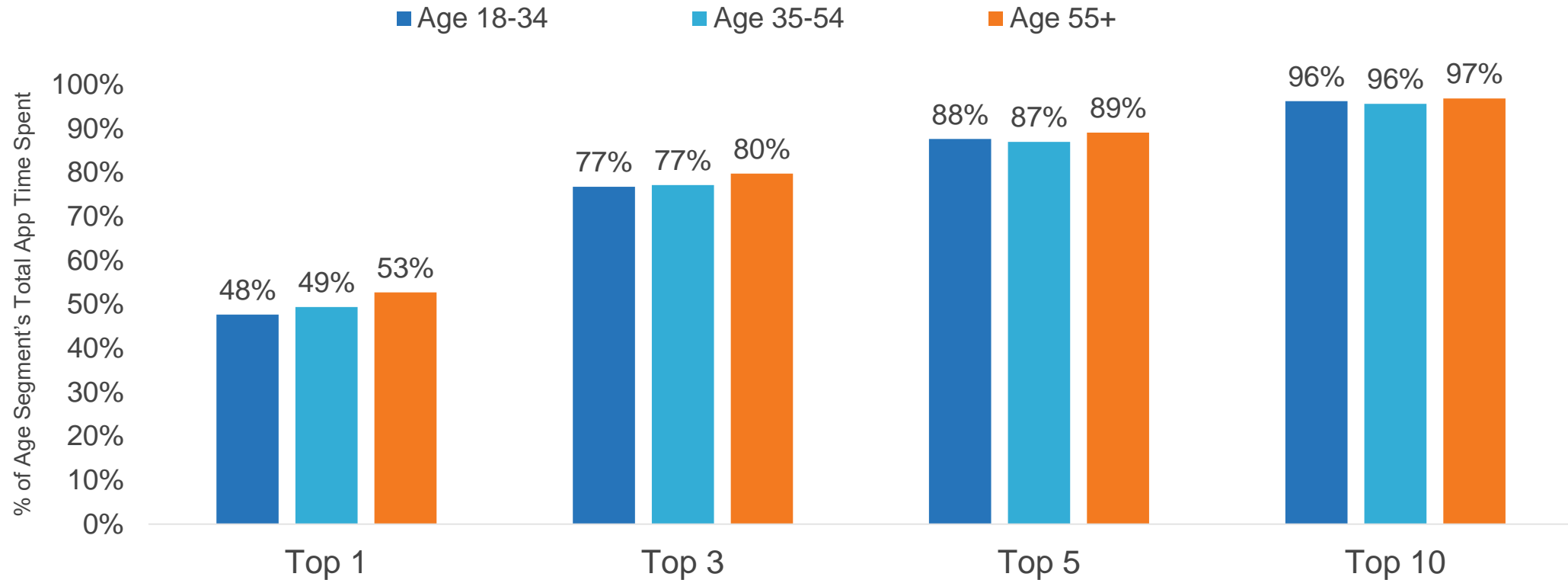
Source: comScore Mobile Metrix (Custom), U.S., Age 18+, June 2017



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

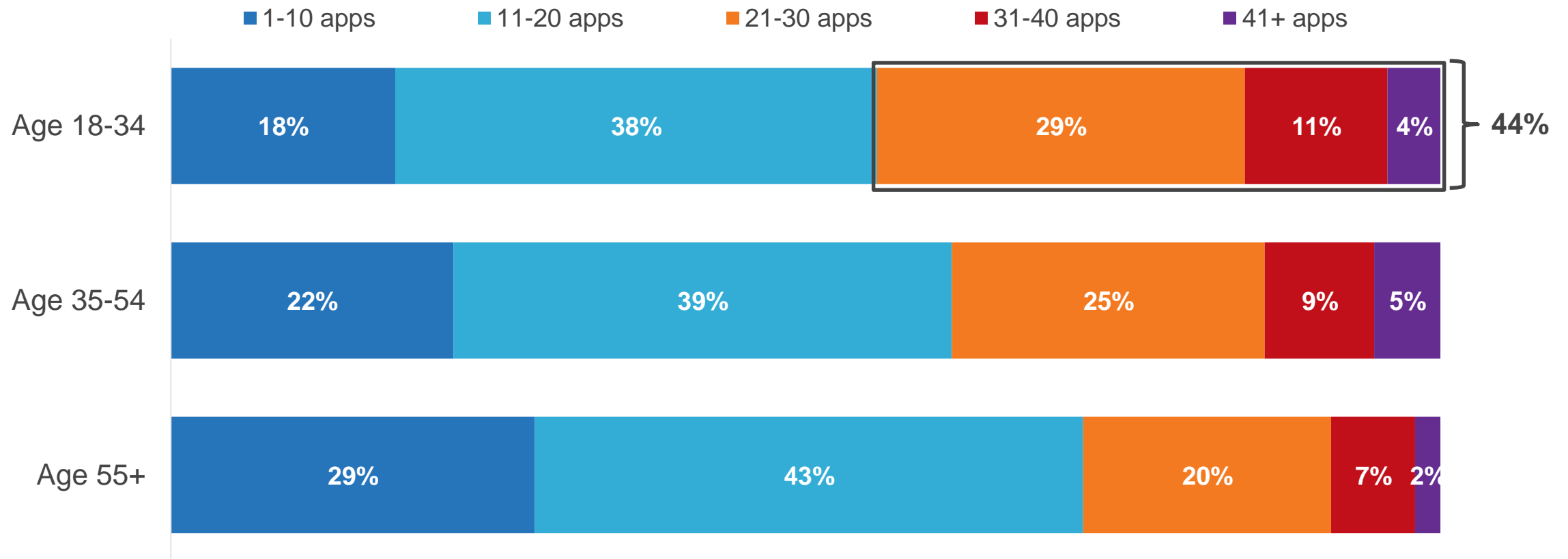
Source: comScore Mobile Metrix (Custom), U.S., Age 18+, June 2017



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

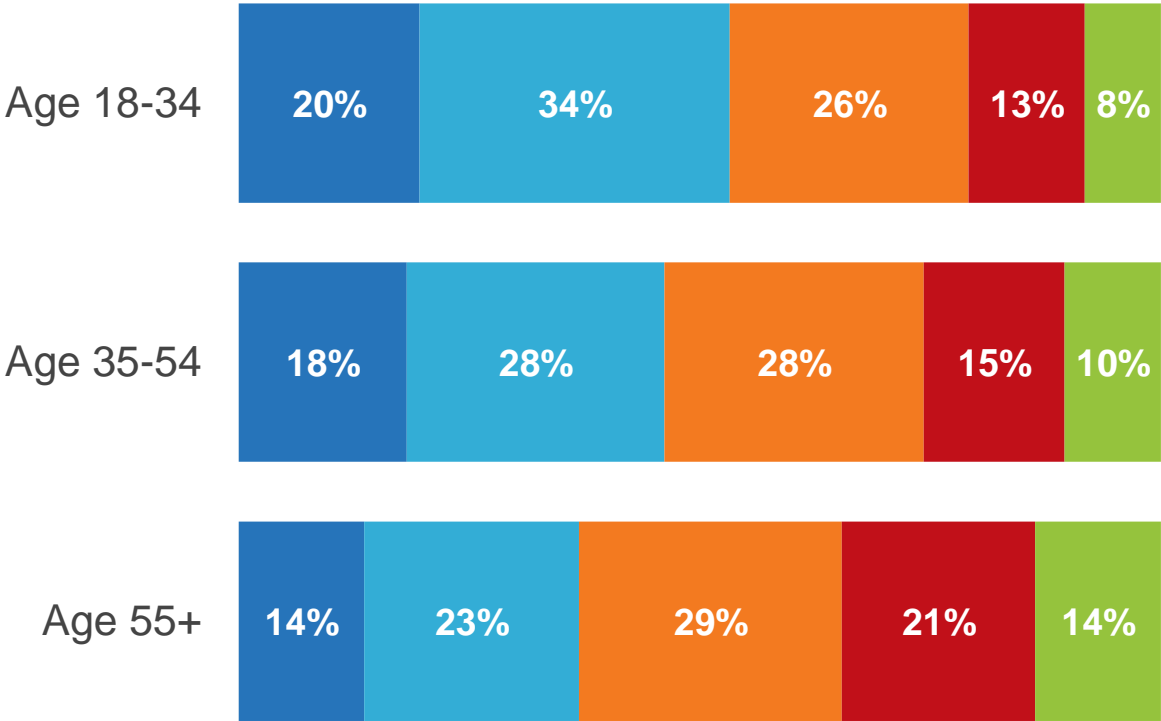


# Despite using more apps than older segments, Millennials utilize fewer screens on their phone and instead organize their apps into folders

## Number of Screens Featuring Apps on Users' Smartphones

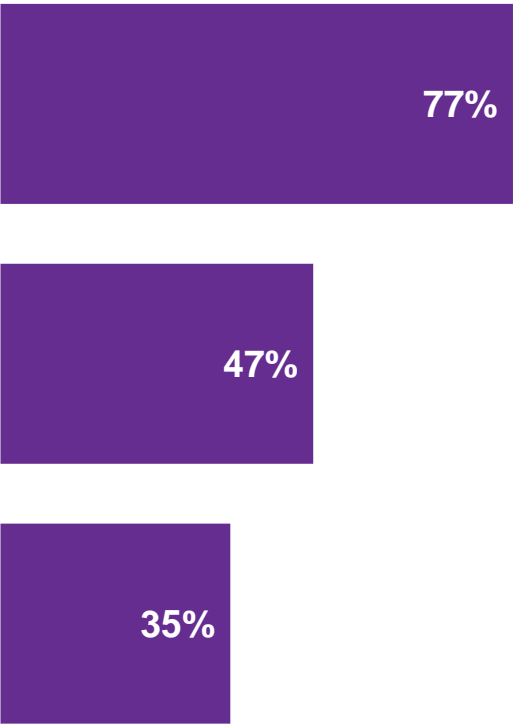
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave

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



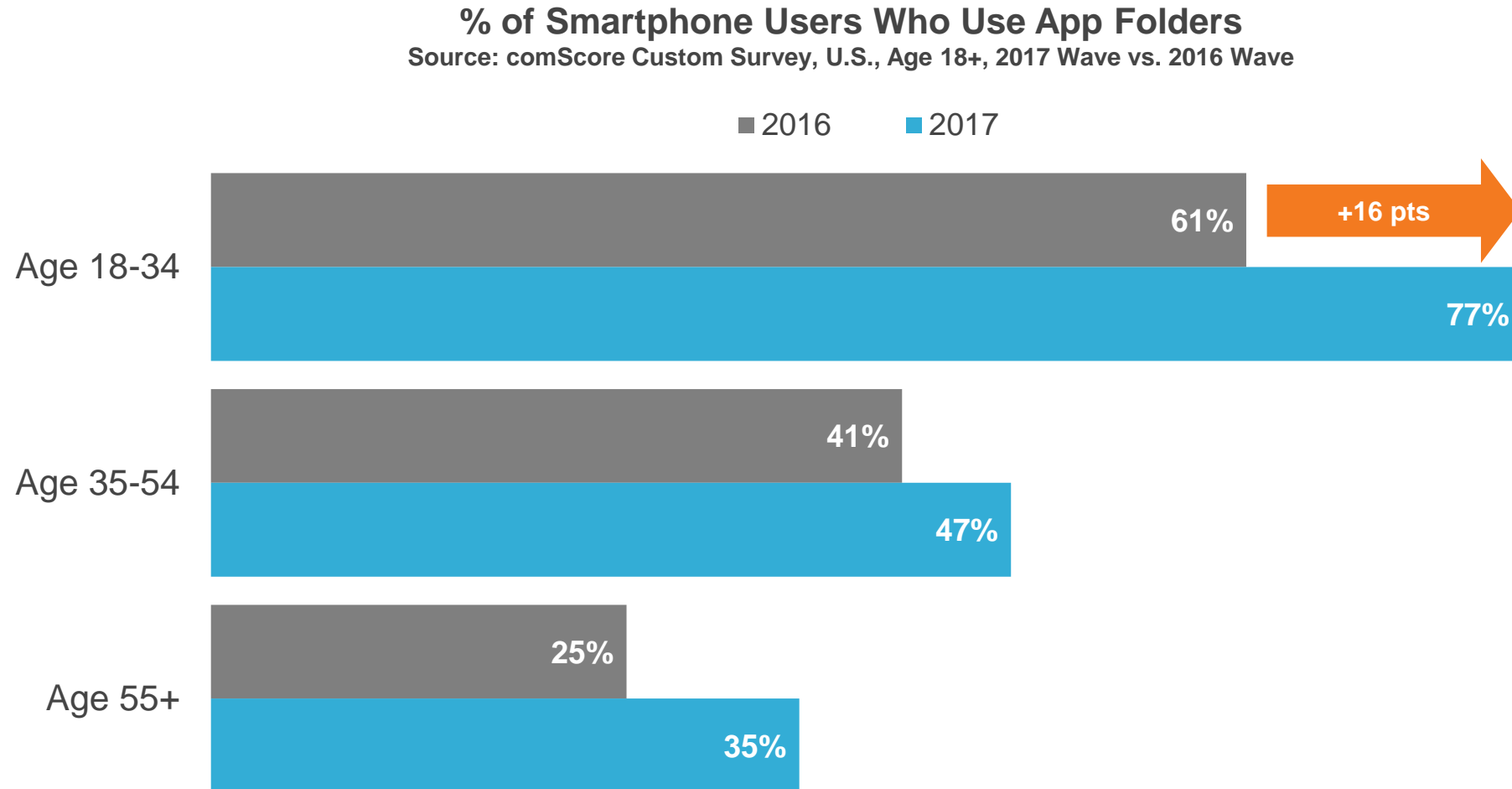
## % of Smartphone Users Who Use App Folders

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

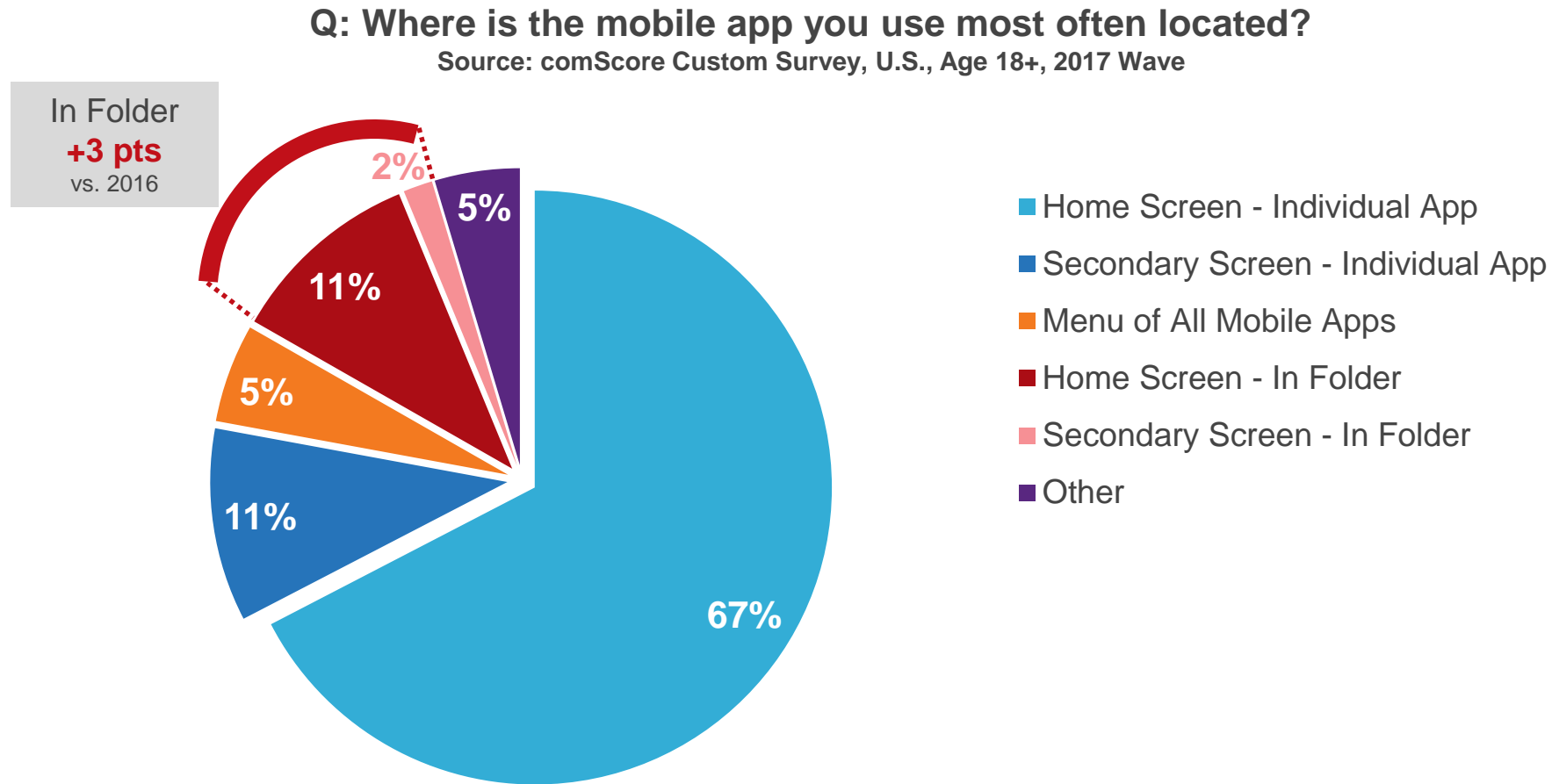




# All age groups are relying on folders more as they seek to organize the high number of apps on their smartphones



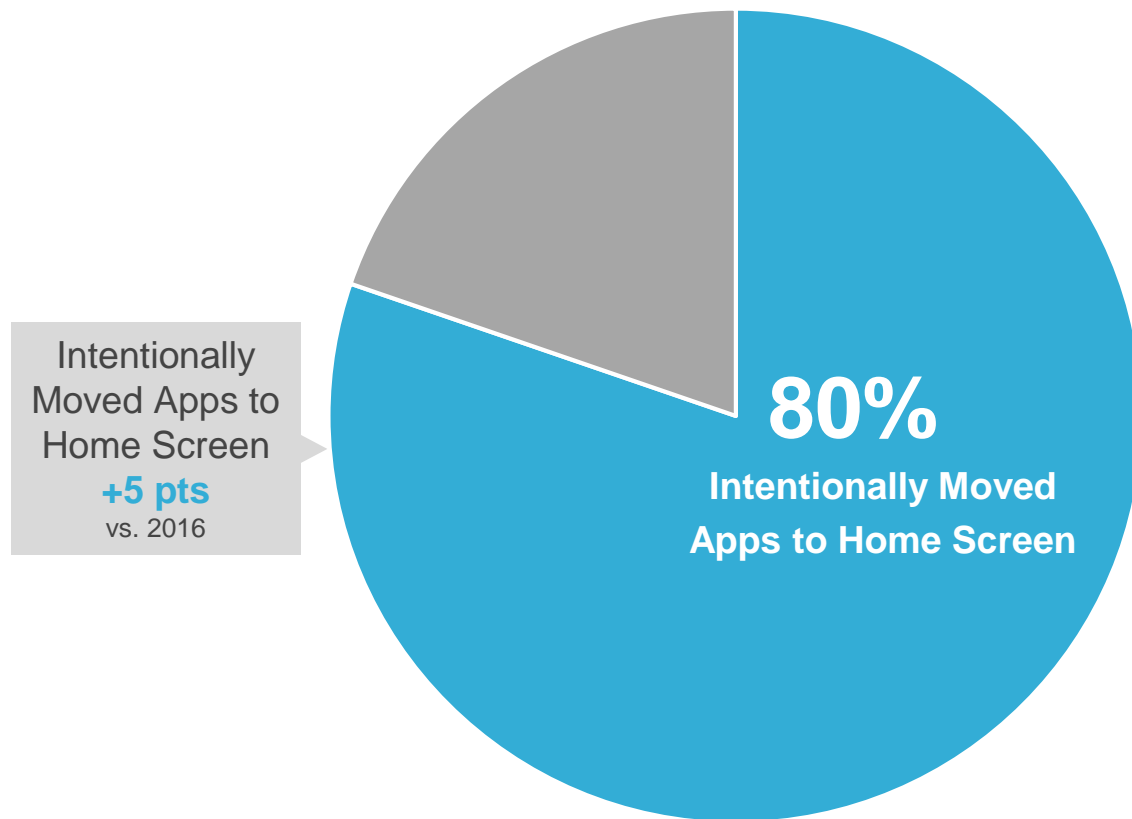
# 2 in 3 smartphone users keep their #1 most used app front and center on the home screen, but more users are now putting it in a folder



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

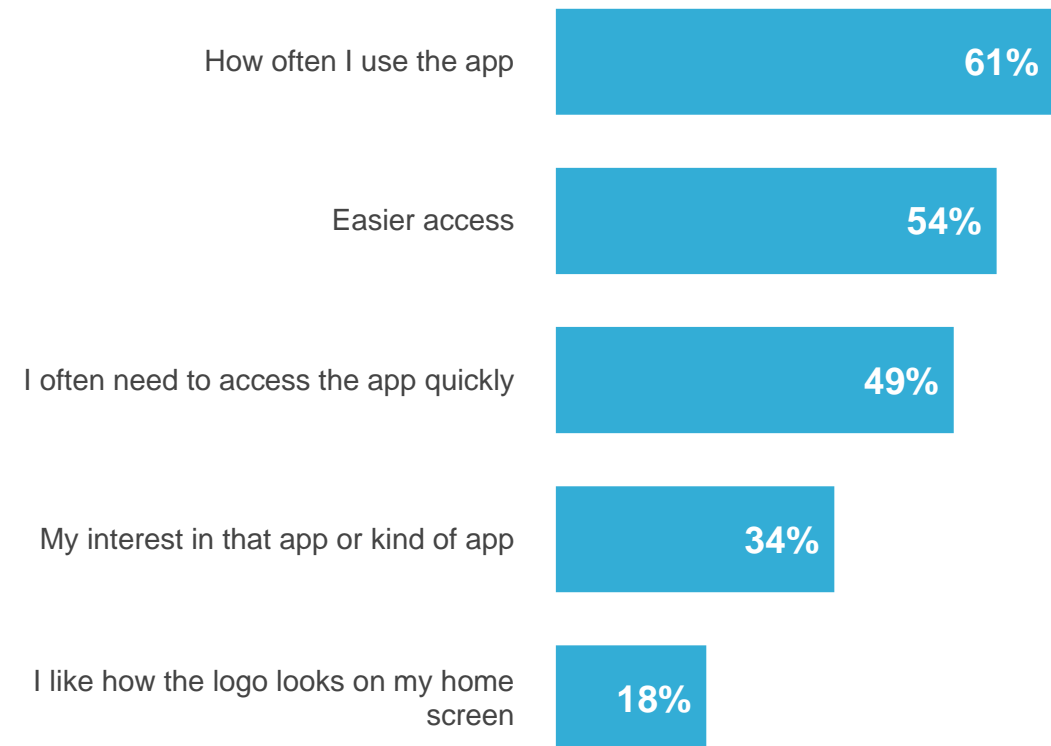
## Percent of Users that Intentionally Move Apps to Home Screen

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



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

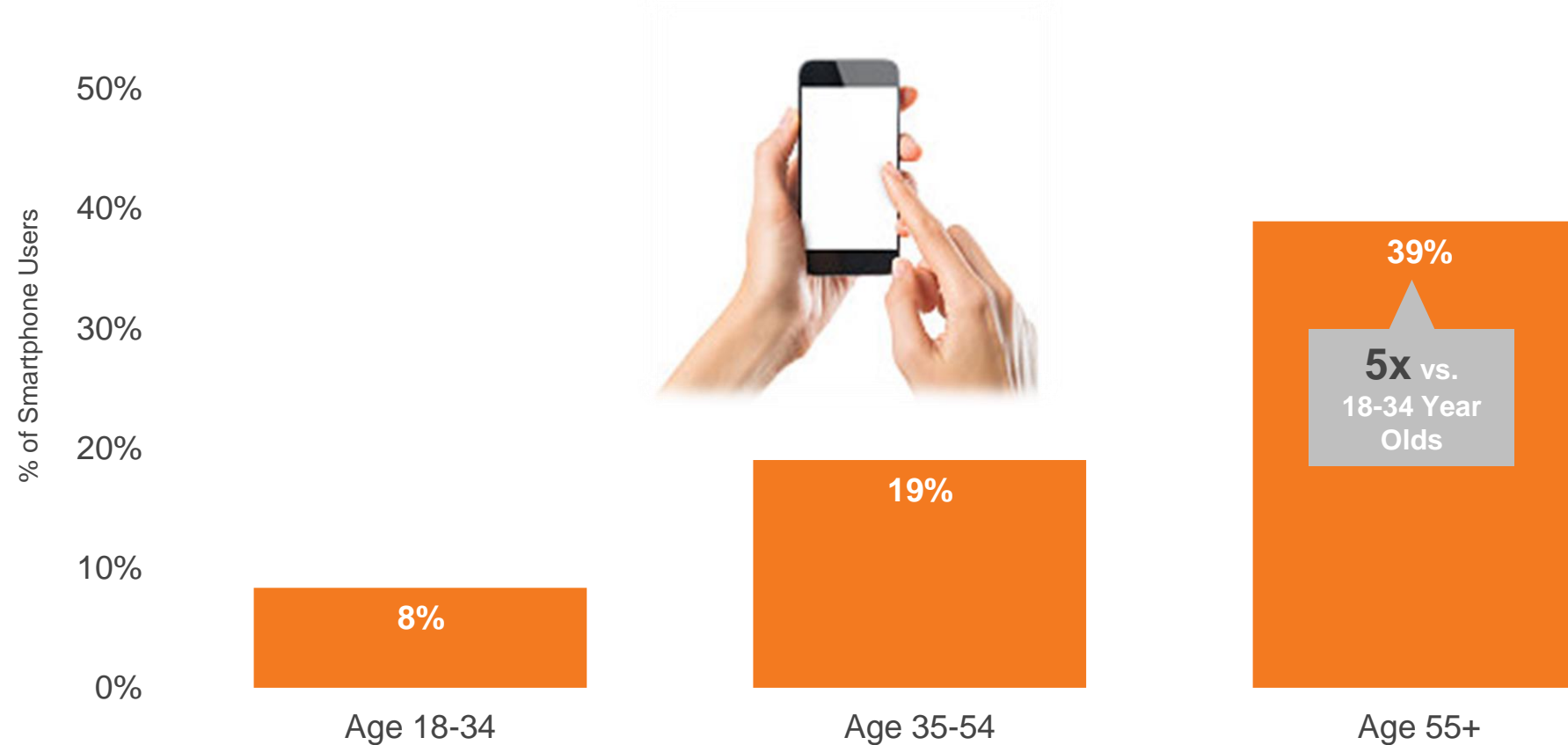
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



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

## % of Smartphone Users by Age Segment Who Only Operate Phone with Two Hands

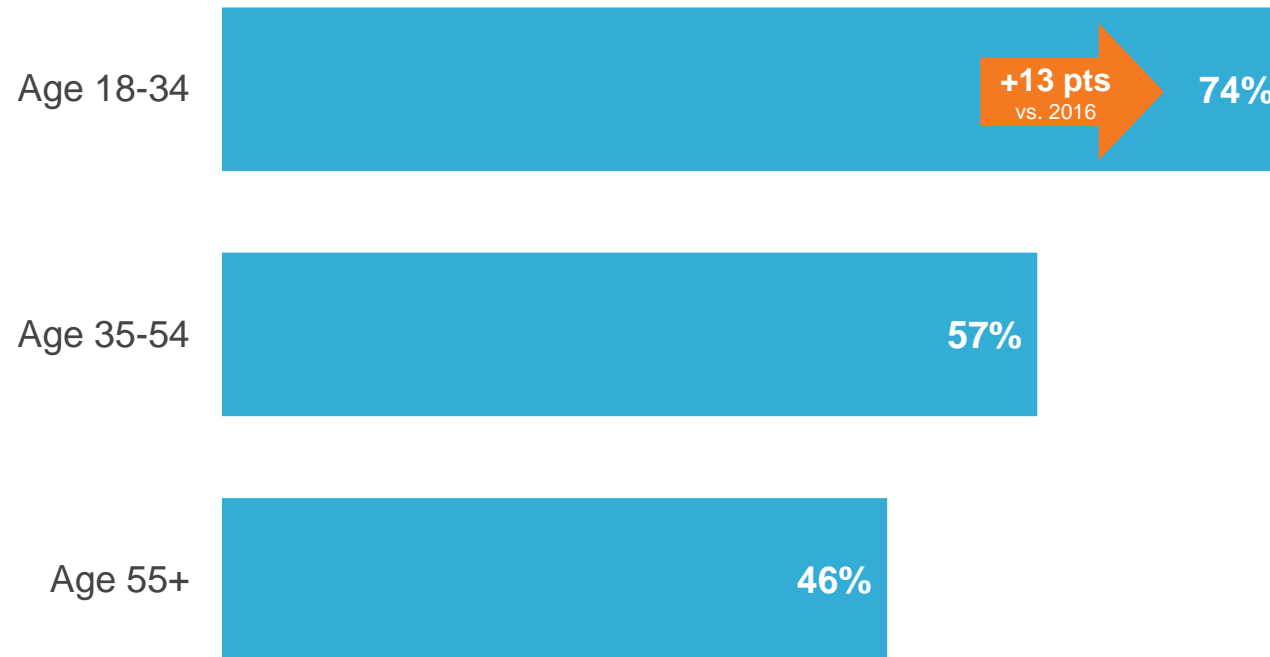
Source: comScore Custom Survey, U.S., Age 18+, July 2017



# 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\*

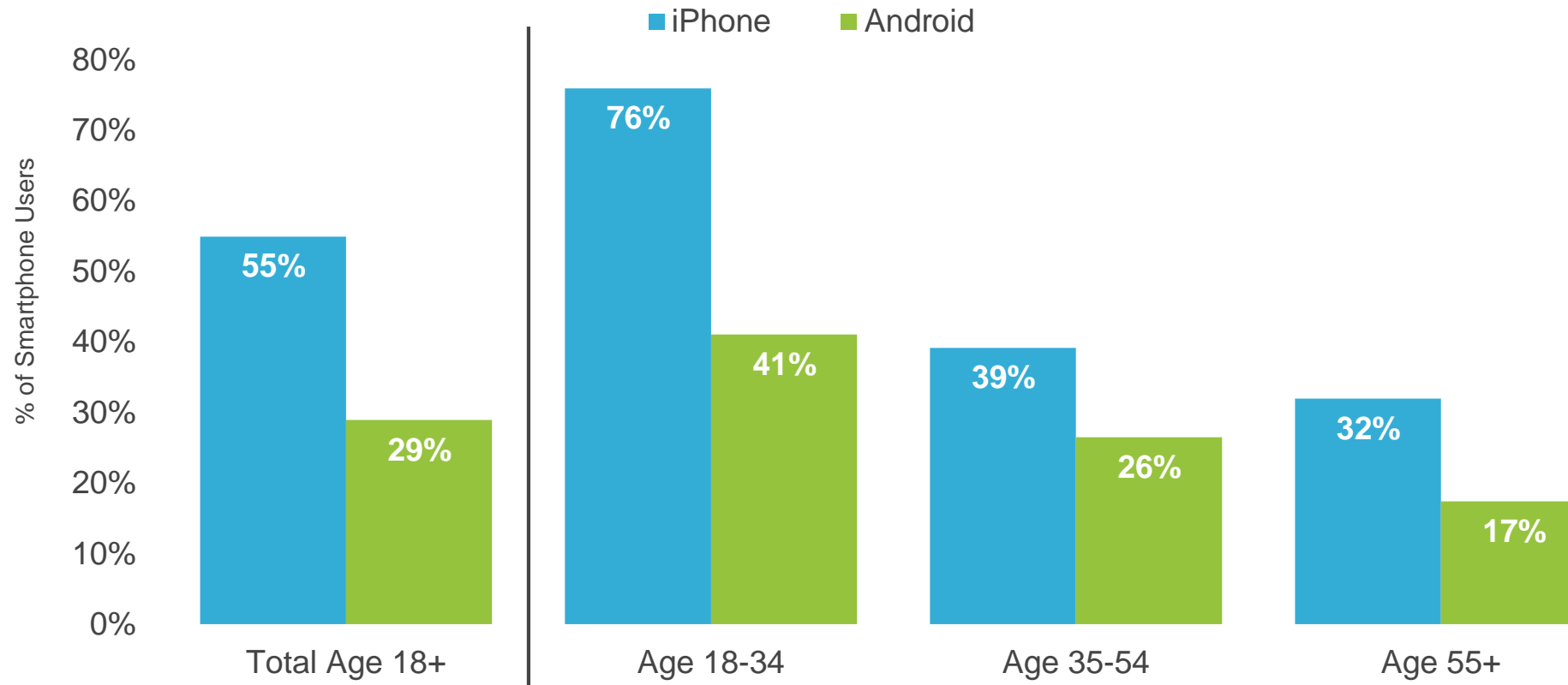
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



# 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

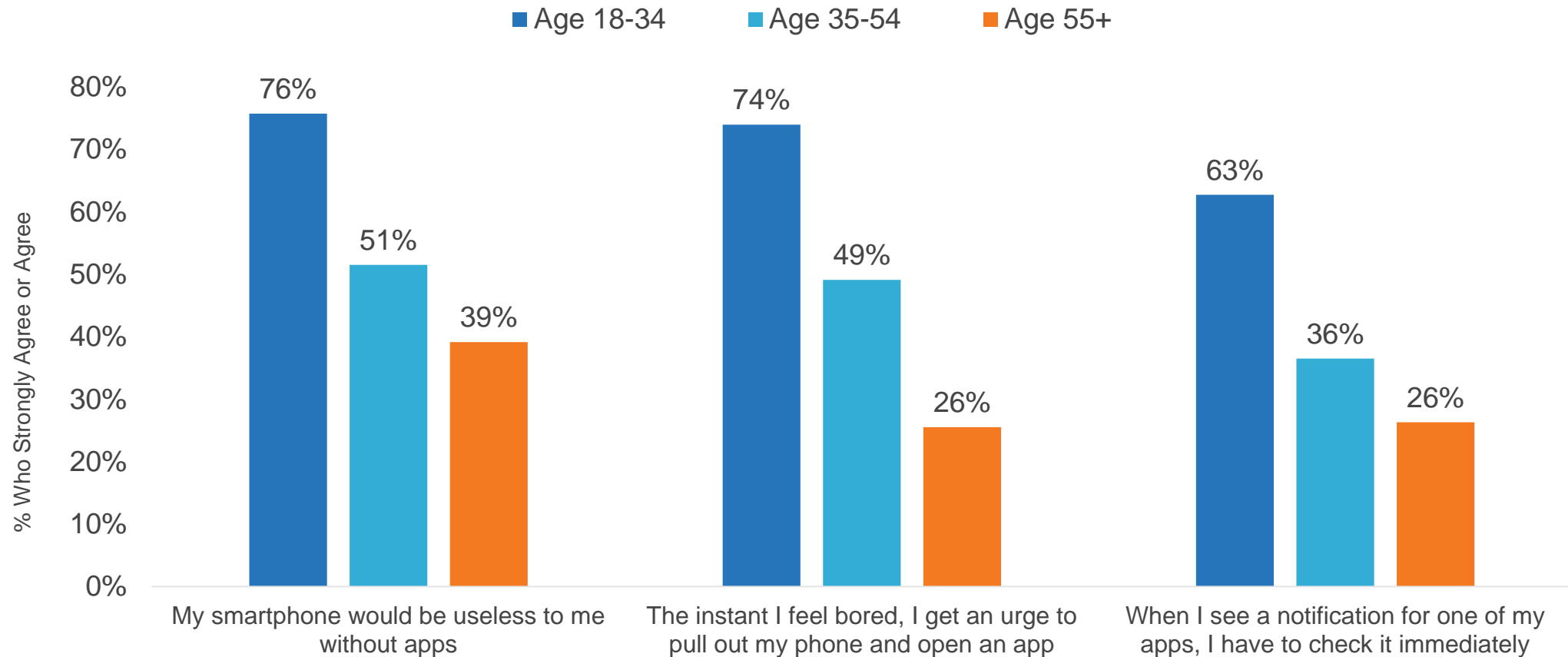
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



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

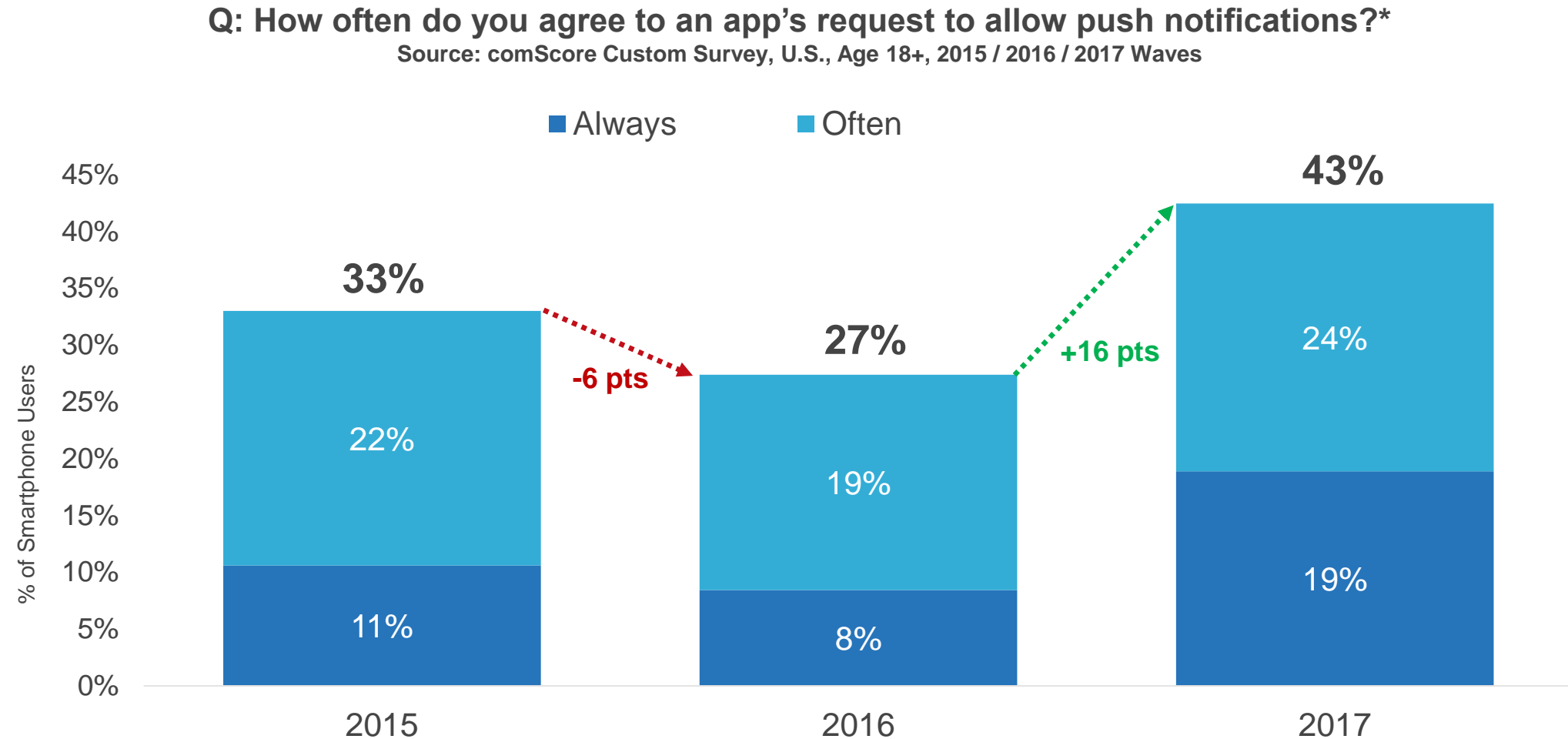
## Smartphone Users' Attitudes About the Importance of Apps by Age Segment\*

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?



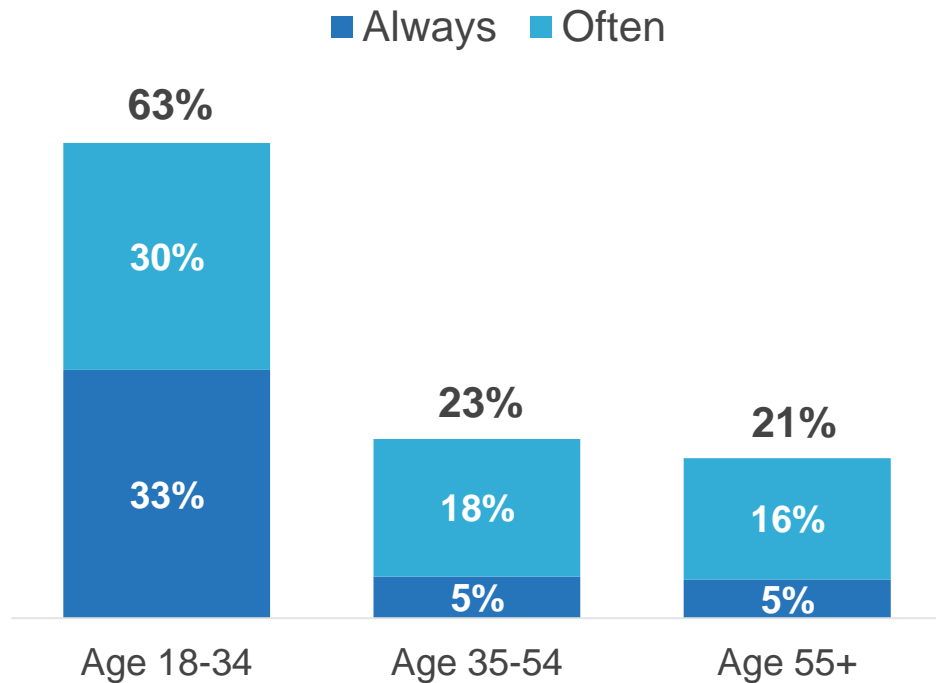


# As the most permissive of push notifications, Millennials have only themselves to blame for their high level of annoyance at receiving them

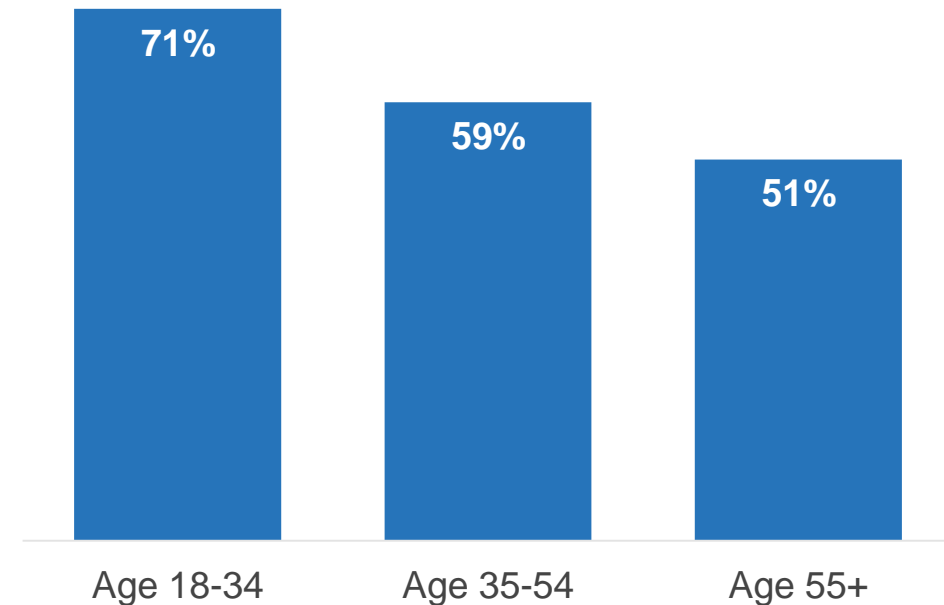
## % of Smartphone Users by Age Segment

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"

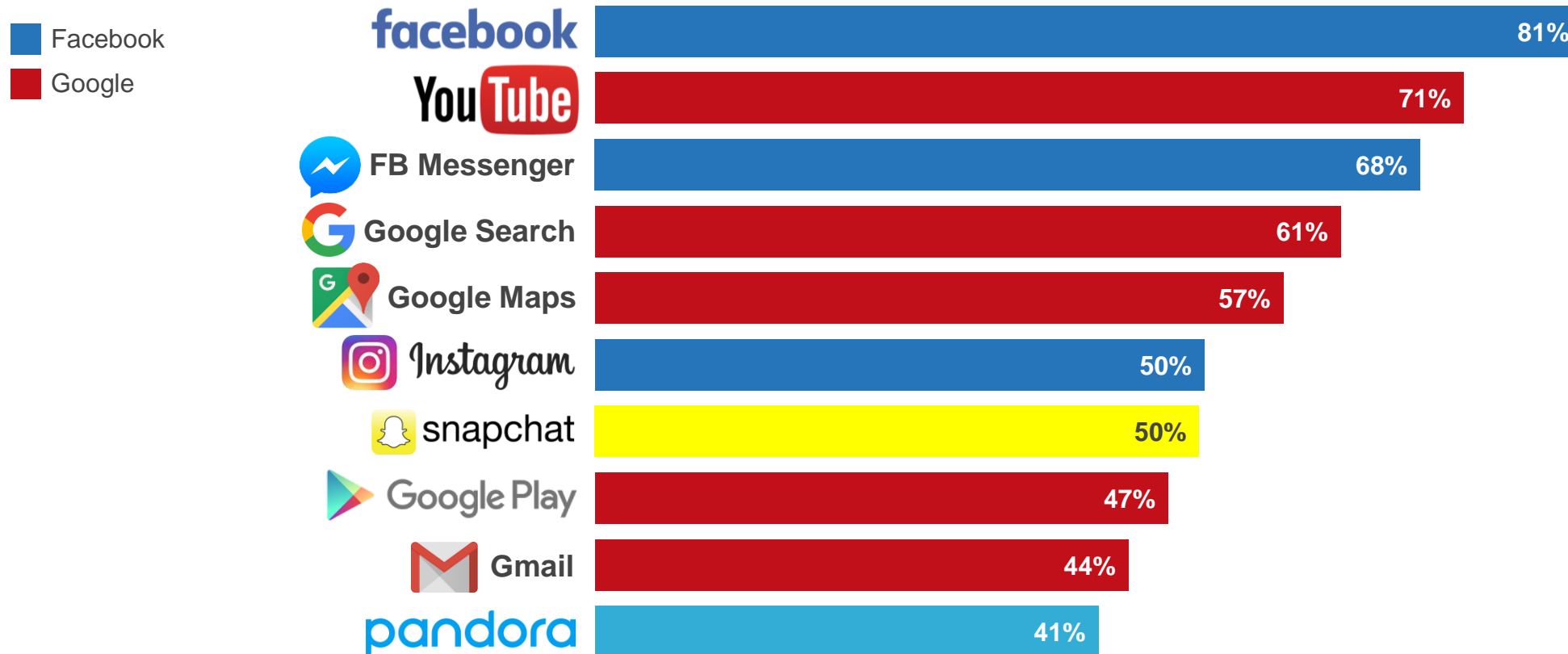


# Top & Fast- Growing Apps

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

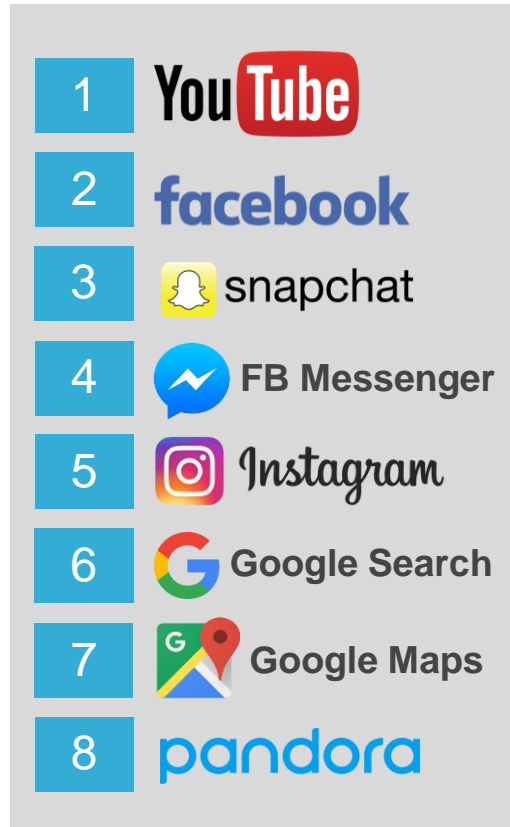


# The top apps vary by age group, with YouTube and Snapchat ranking higher on the list among younger Millennials

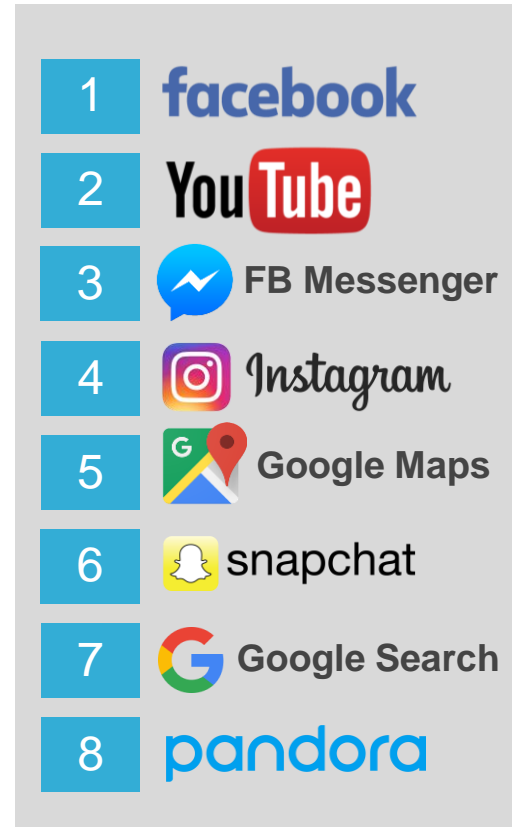
## Top Apps by Unique Visitors

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

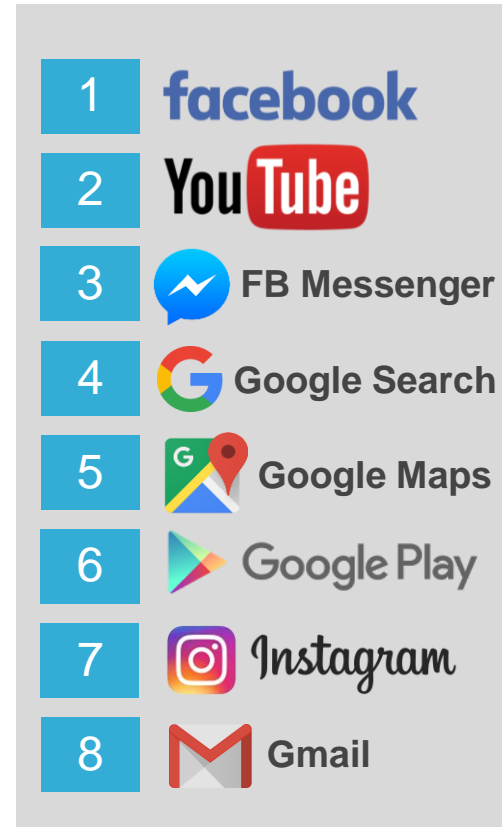
### Age 18-24



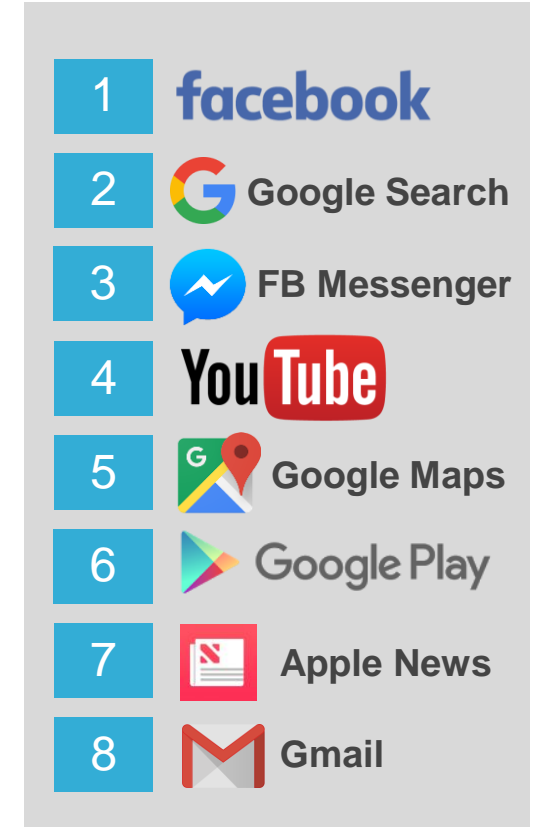
### Age 25-34



### Age 35-54

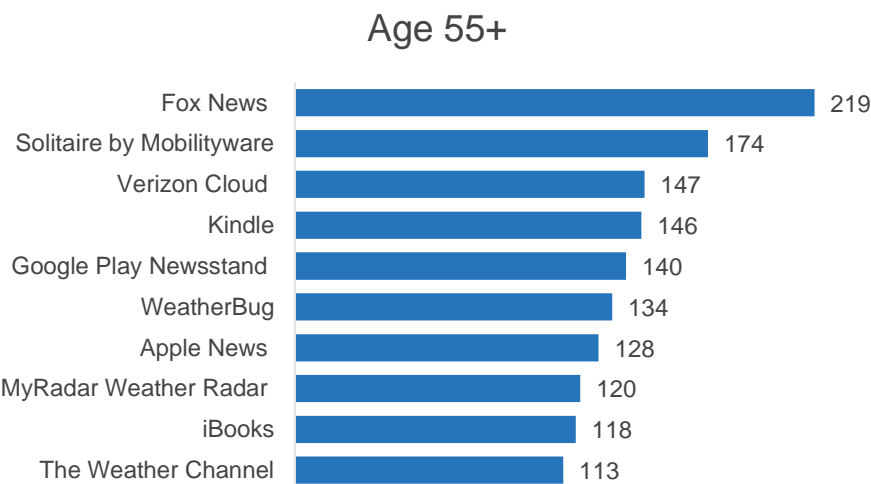
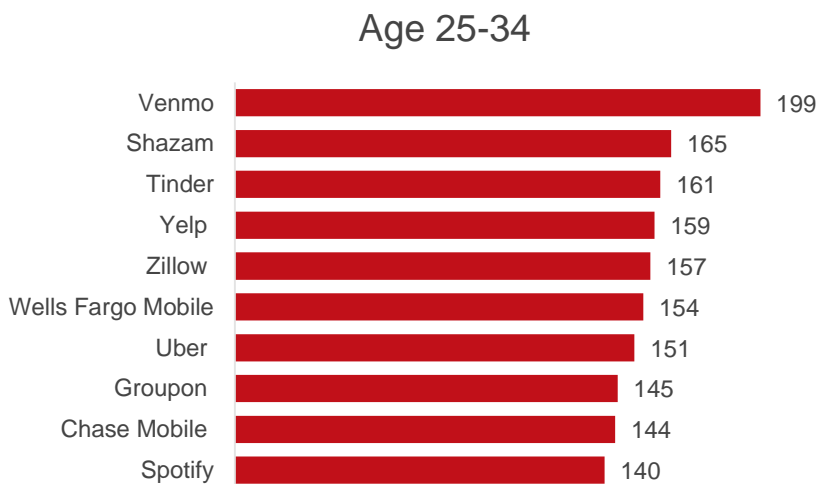
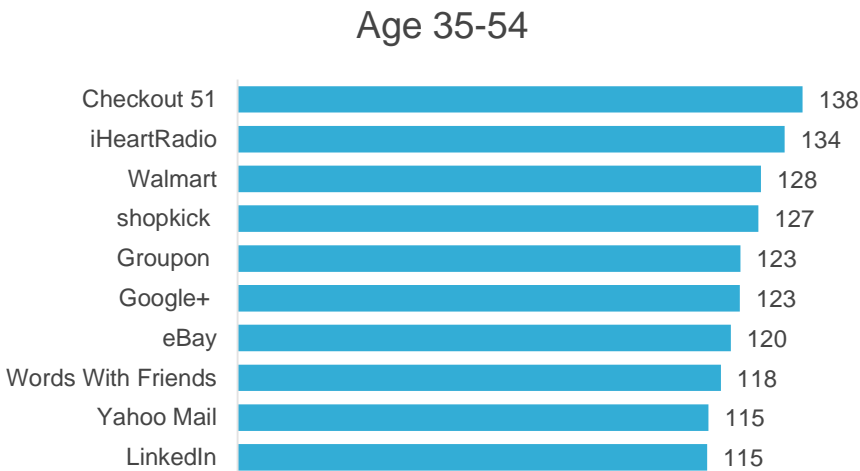
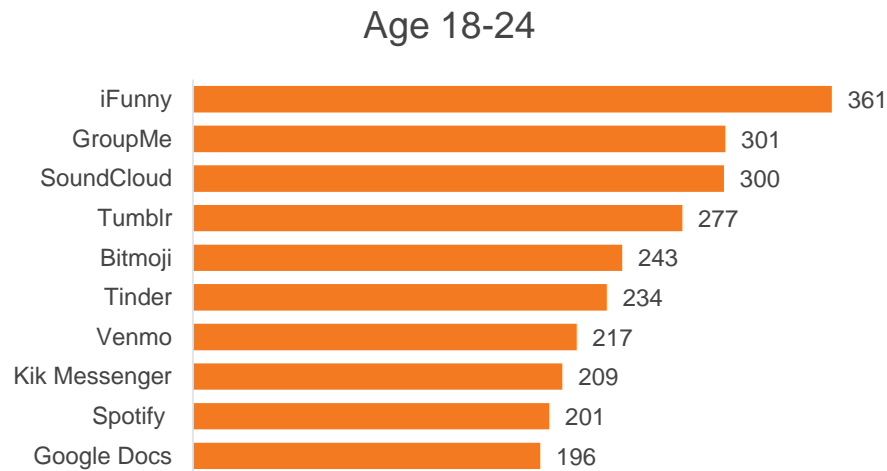


### Age 55+



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

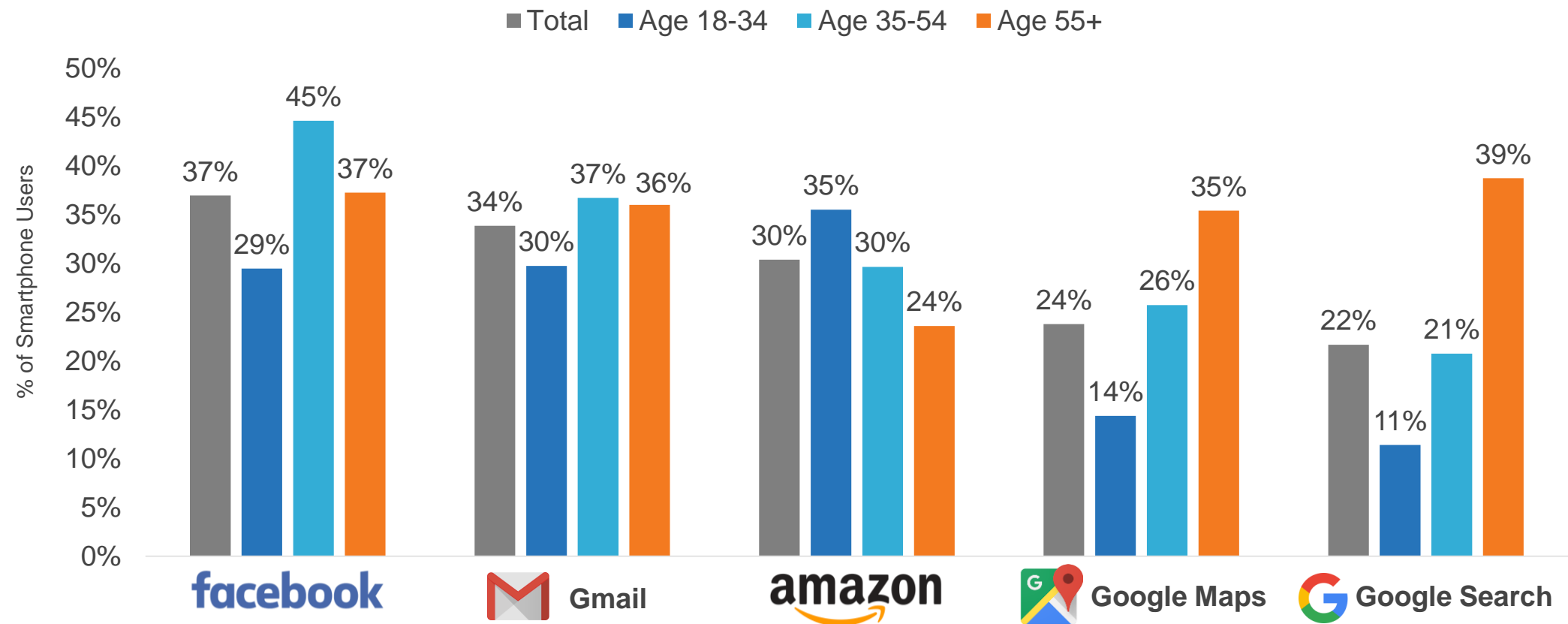
**Top Indexing Apps\* by Age Segment**  
Source: comScore Mobile Metrix, U.S., Age 18+, June 2017



# 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

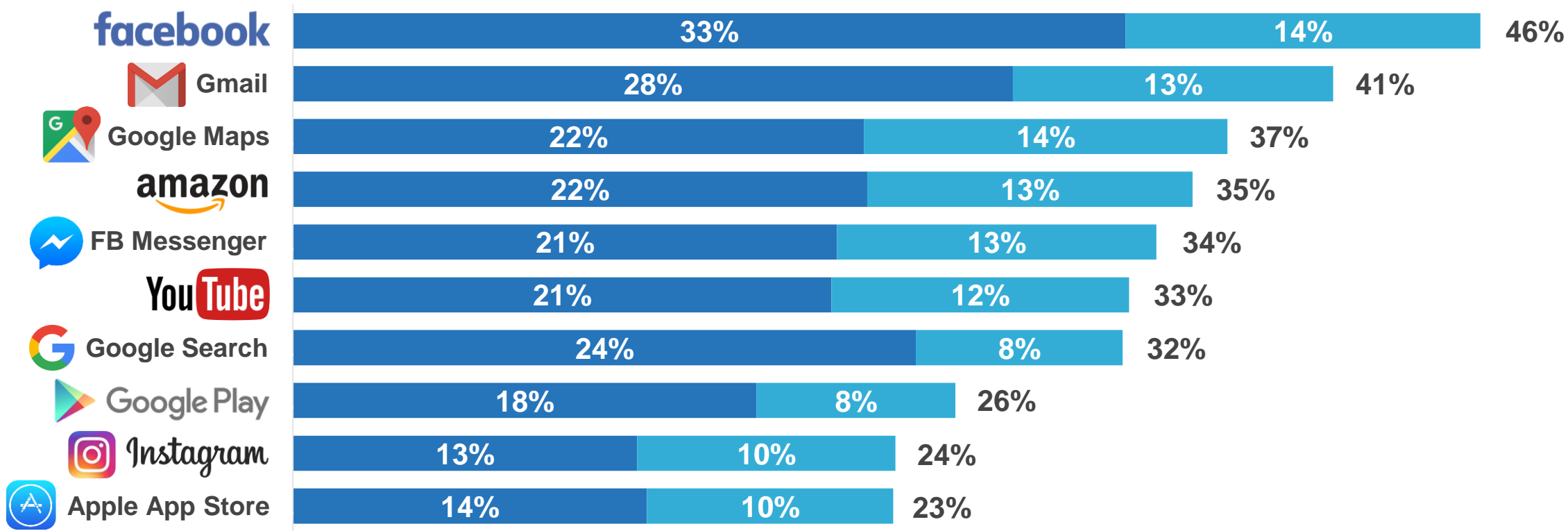


Facebook is also the most likely app to be positioned on smartphone users' home screens for easy access

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

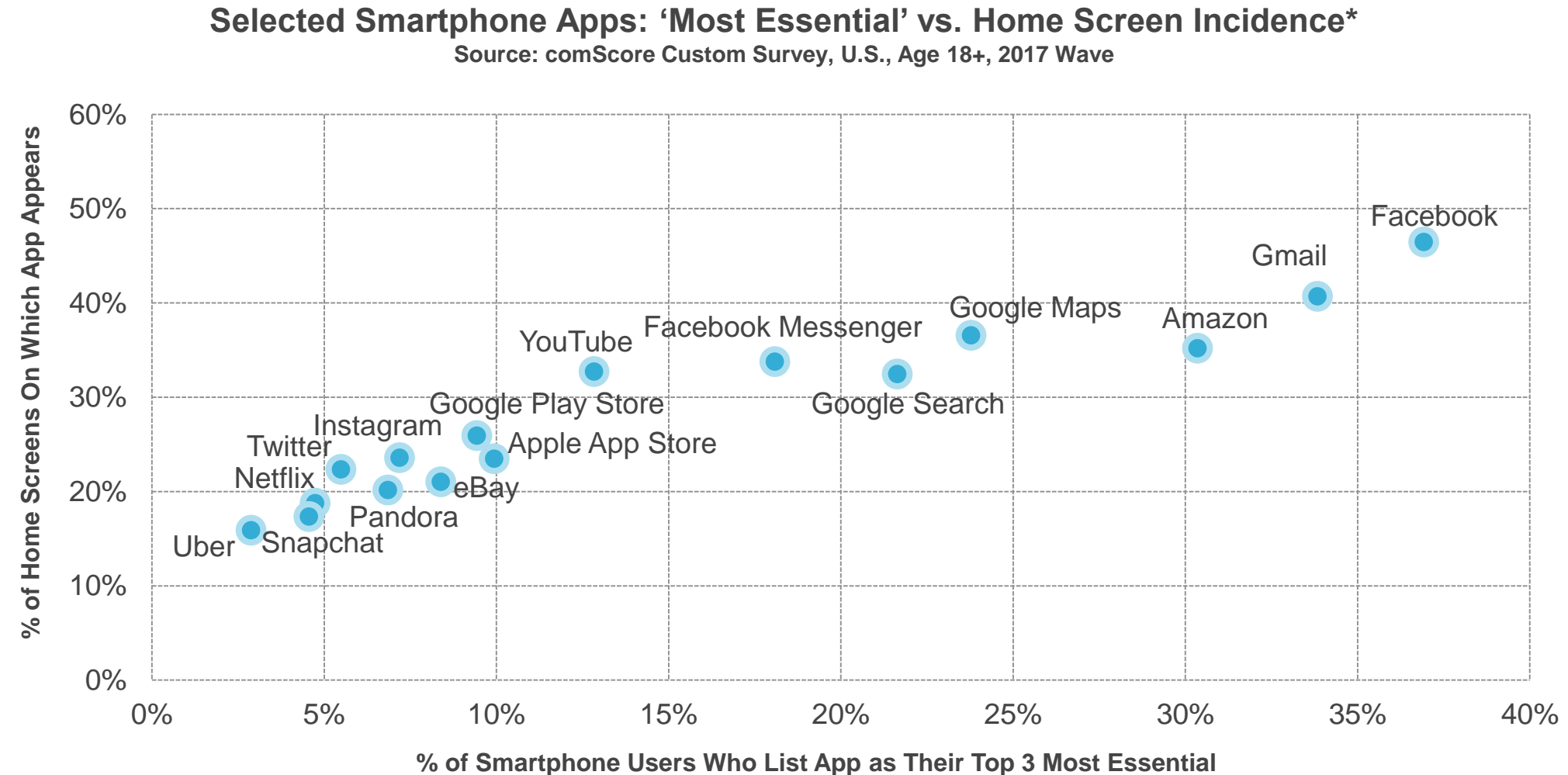
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave

■ Home Screen - Individual App      ■ Home Screen - In Folder





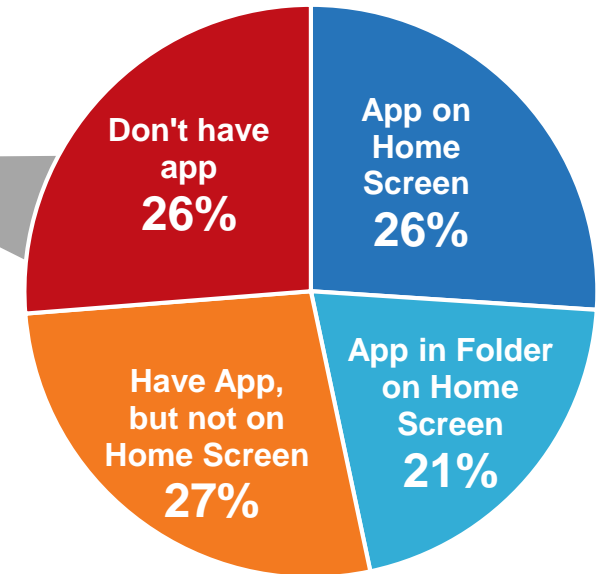
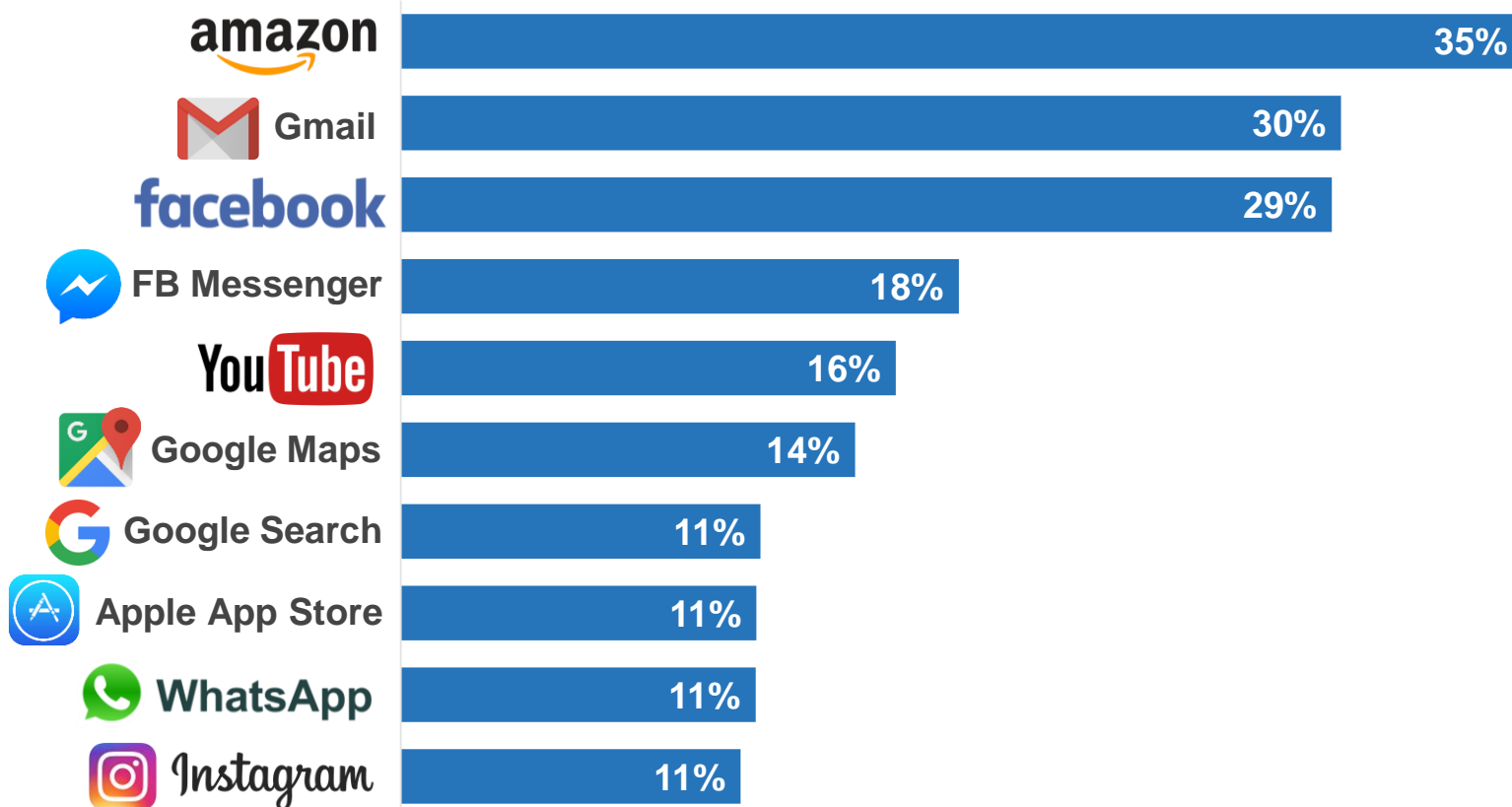
# There's a strong correlation between how essential an app is to a user and whether it gets placed on their home screen



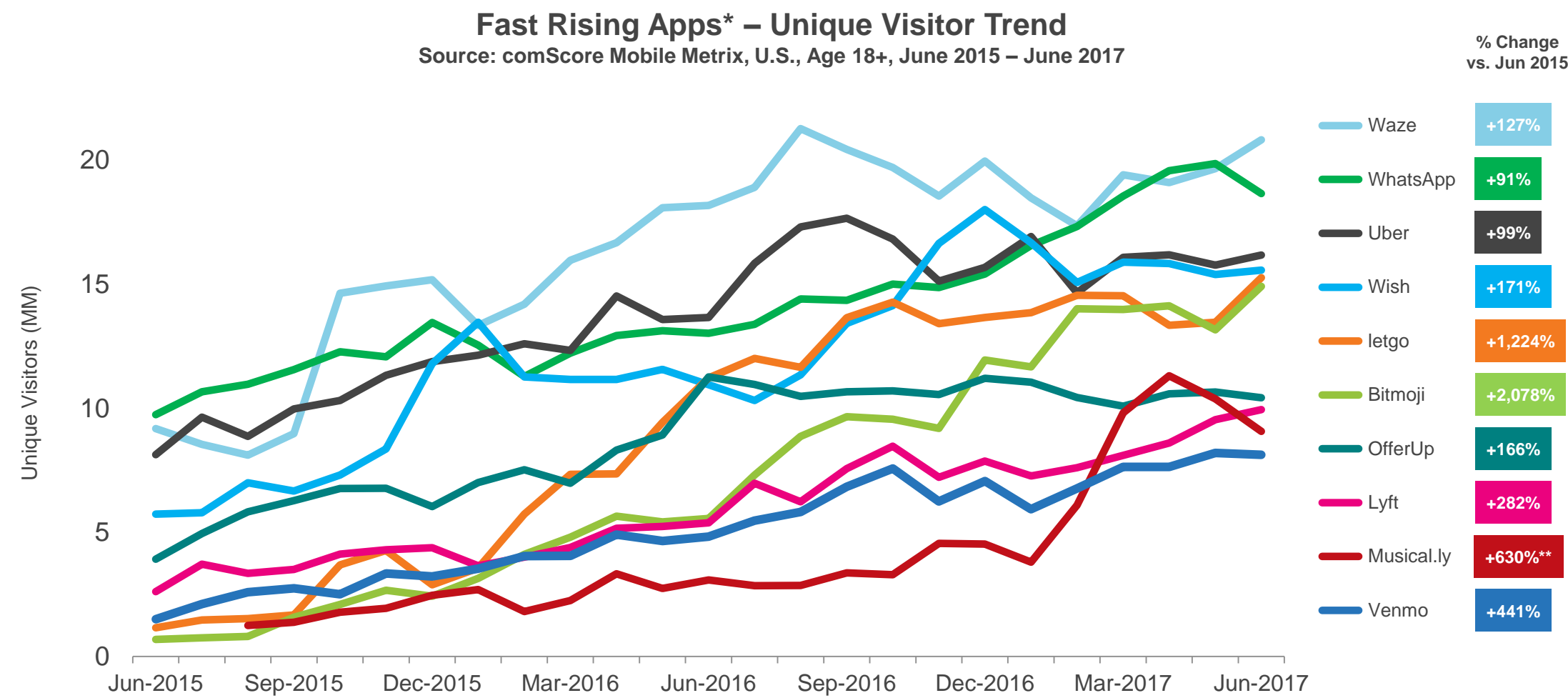
# 35% of Millennials selected Amazon as one of three apps they can't go without, and often ranked more functional apps over social apps

## Most Essential Apps 18-34 Year-Olds Said They 'Can't Go Without'

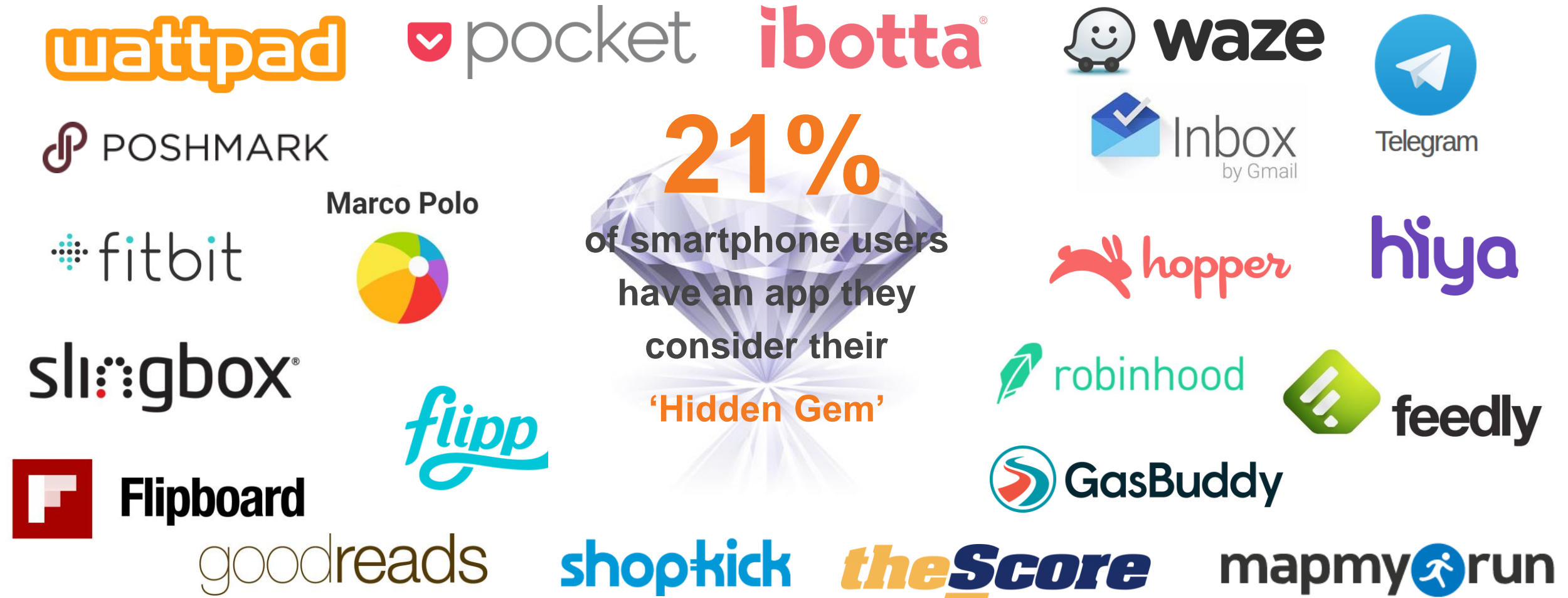
Source: comScore Custom Survey, U.S., Age 18+, 2017 Wave



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



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

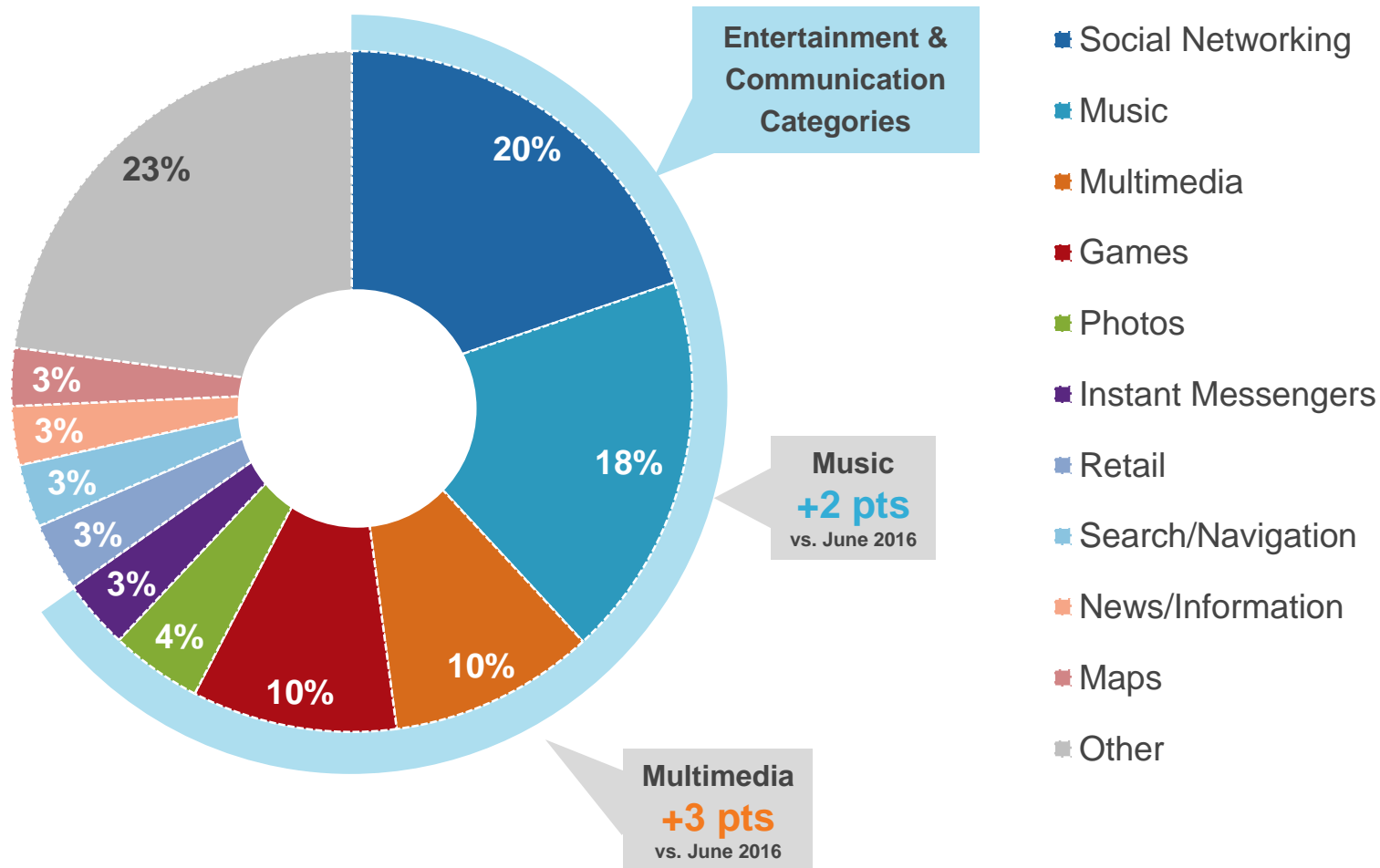


# App Content Categories

# 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

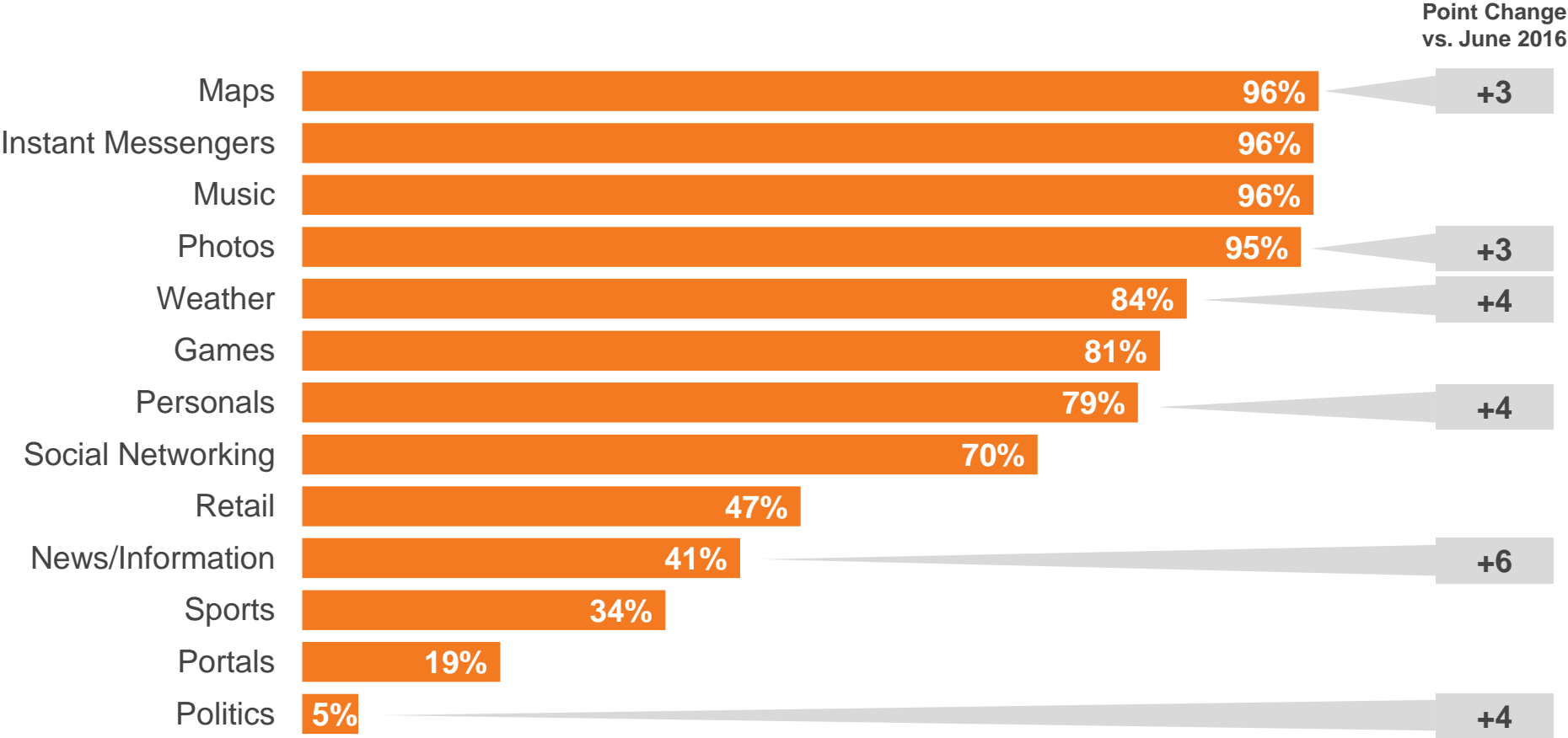
Source: comScore Mobile Metrix, U.S., Age 18+, June 2017



# Engagement in several content categories continues to transition to apps, with News seeing one of the most notable shifts from a year ago

## Mobile App Share of Total Digital Time Spent for Selected Content Categories

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



# Social Networking Apps: Category Snapshot



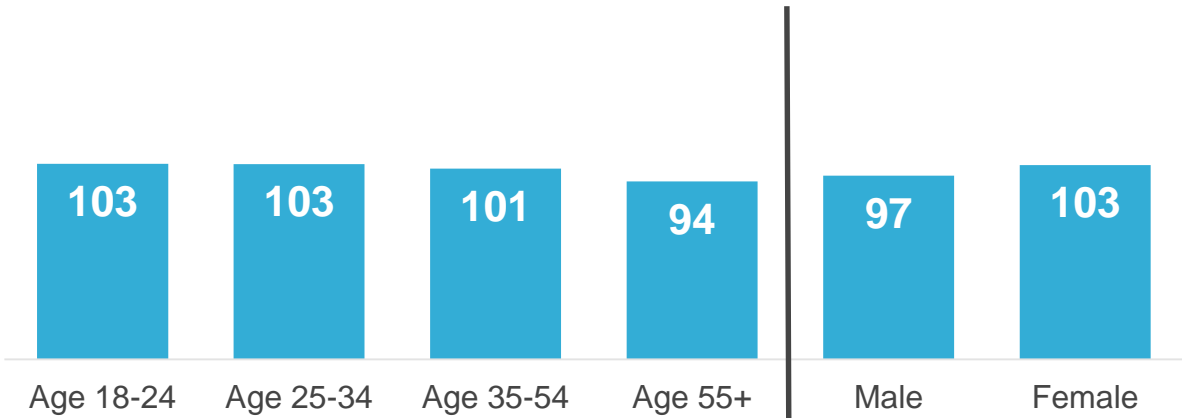
## App User Penetration

% Reach of Total App Audience

93%

## Demographic Profile

Index of Category vs. Total App Audience



## #1 Ranked App

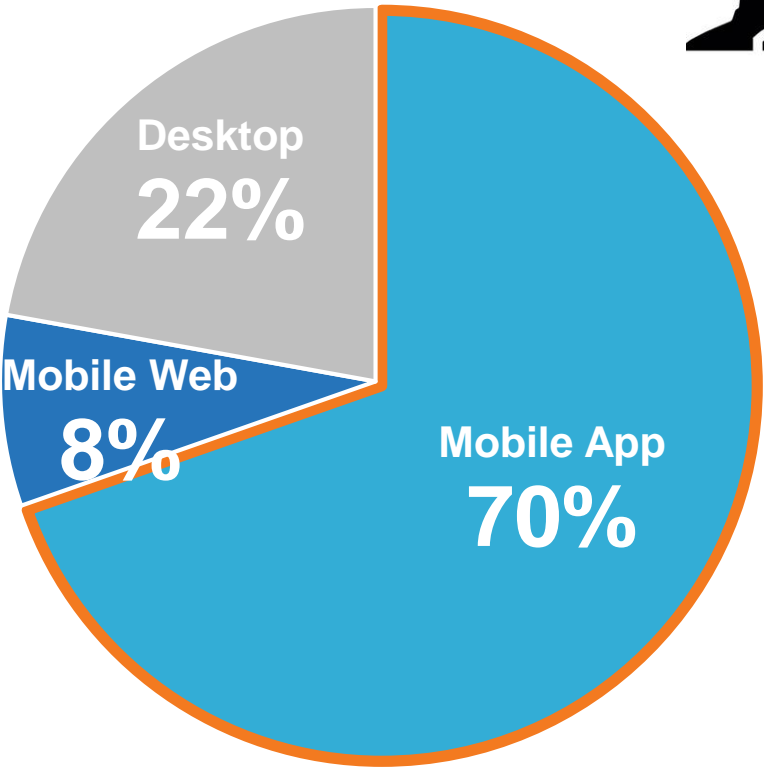
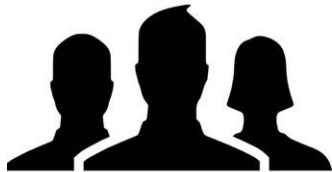
by Unique Visitors



Facebook

## Usage Breakdown

by Share of Category's Total Digital Time Spent





# News Apps: Category Snapshot



## App User Penetration

% Reach of Total App Audience

77%

## #1 Ranked App

by Unique Visitors



Apple News

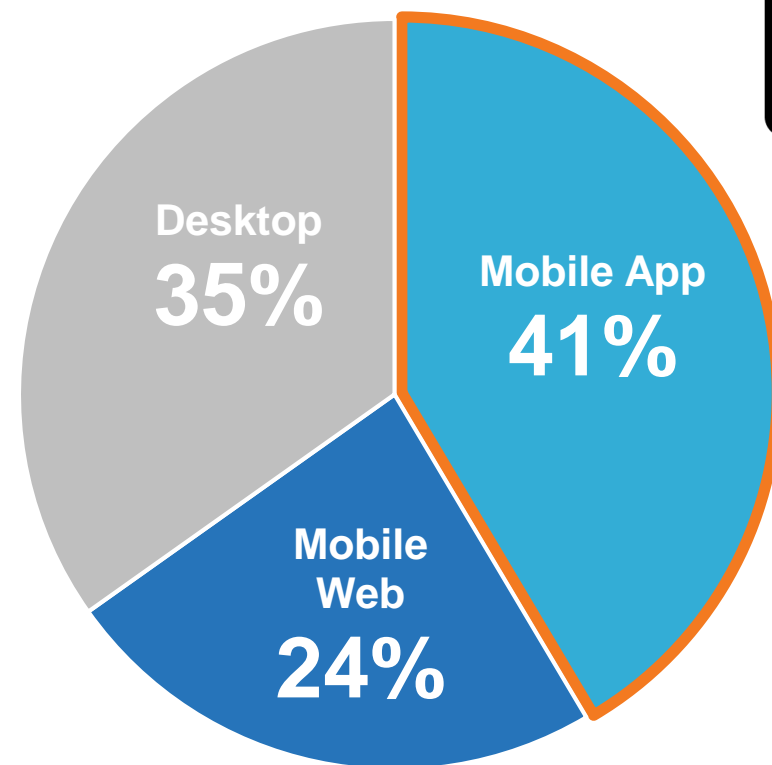
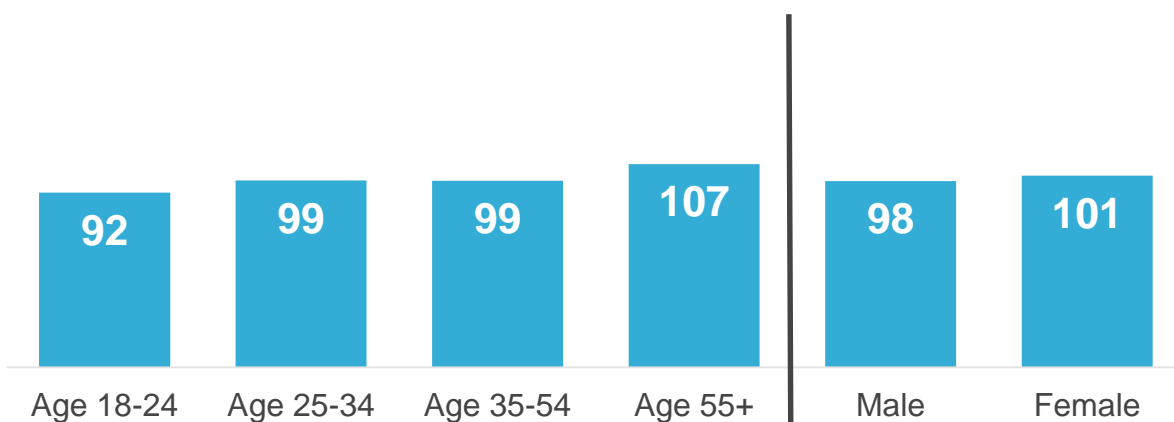
## Usage Breakdown

by Share of Category's Total Digital Time Spent



## Demographic Profile

Index of Category vs. Total App Audience



# Retail Apps: Category Snapshot



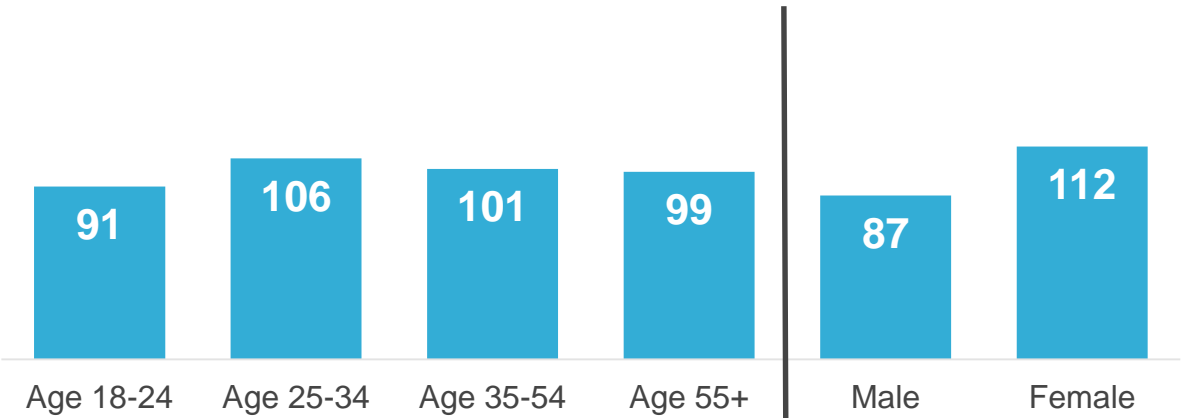
## App User Penetration

% Reach of Total App Audience

75%

## Demographic Profile

Index of Category vs. Total App Audience



## #1 Ranked App

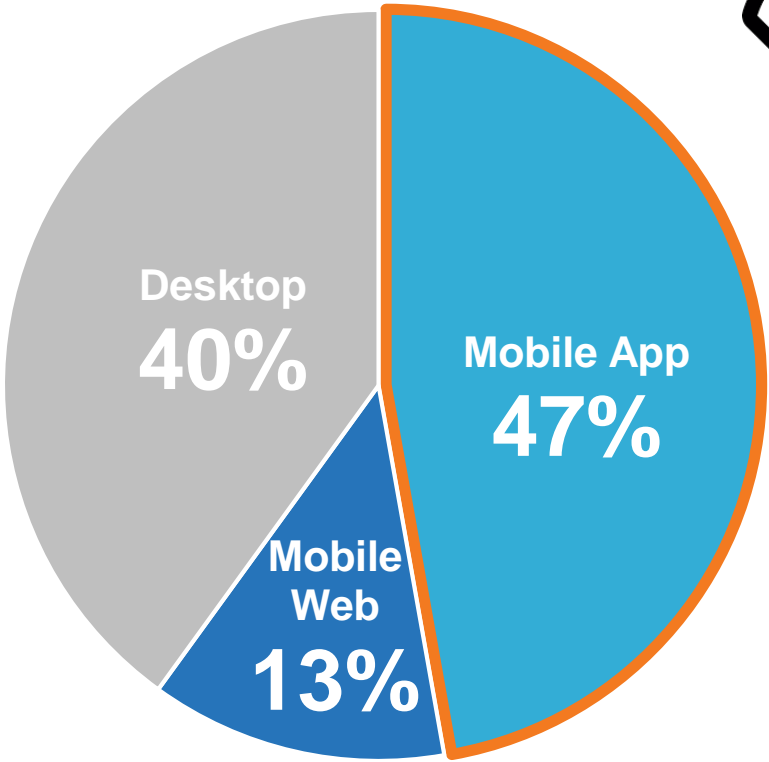
by Unique Visitors



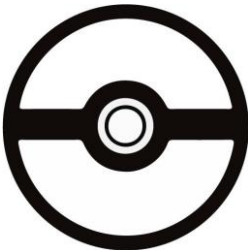
Amazon

## Usage Breakdown

by Share of Category's Total Digital Time Spent



# Gaming Apps: Category Snapshot



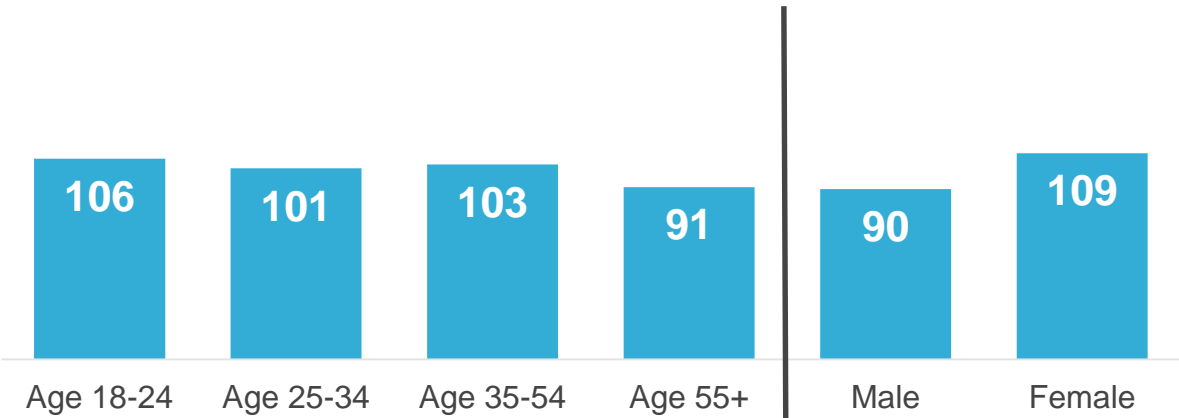
## App User Penetration

% Reach of Total App Audience

67%

## Demographic Profile

Index of Category vs. Total App Audience



## #1 Ranked App

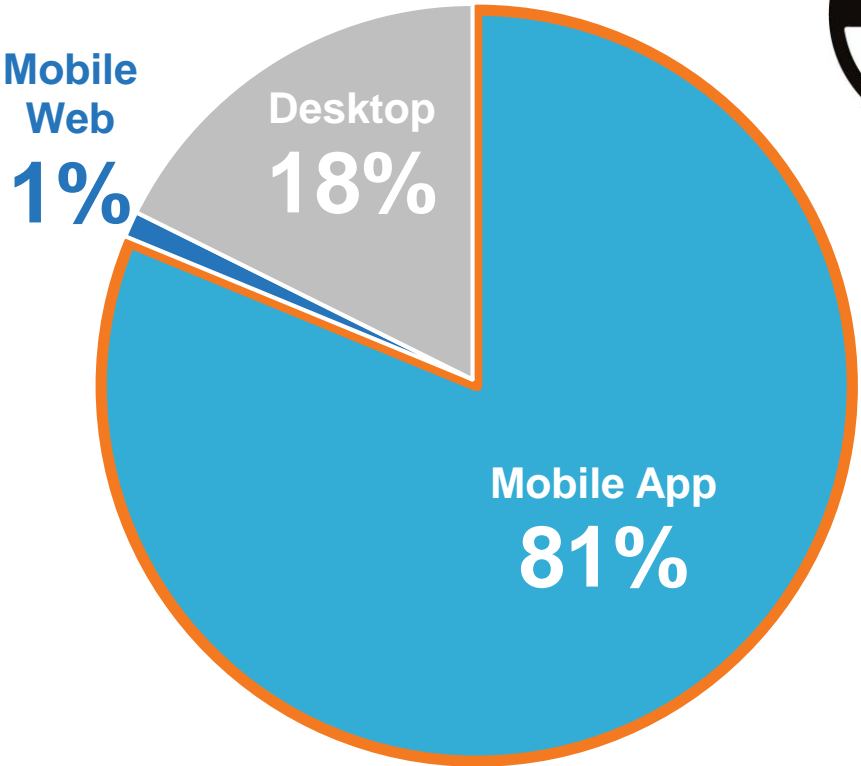
by Unique Visitors



Words With Friends

## Usage Breakdown

by Share of Category's Total Digital Time Spent



# Travel Apps: Category Snapshot



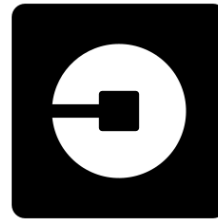
## App User Penetration

% Reach of Total App Audience

**27%**

## #1 Ranked App

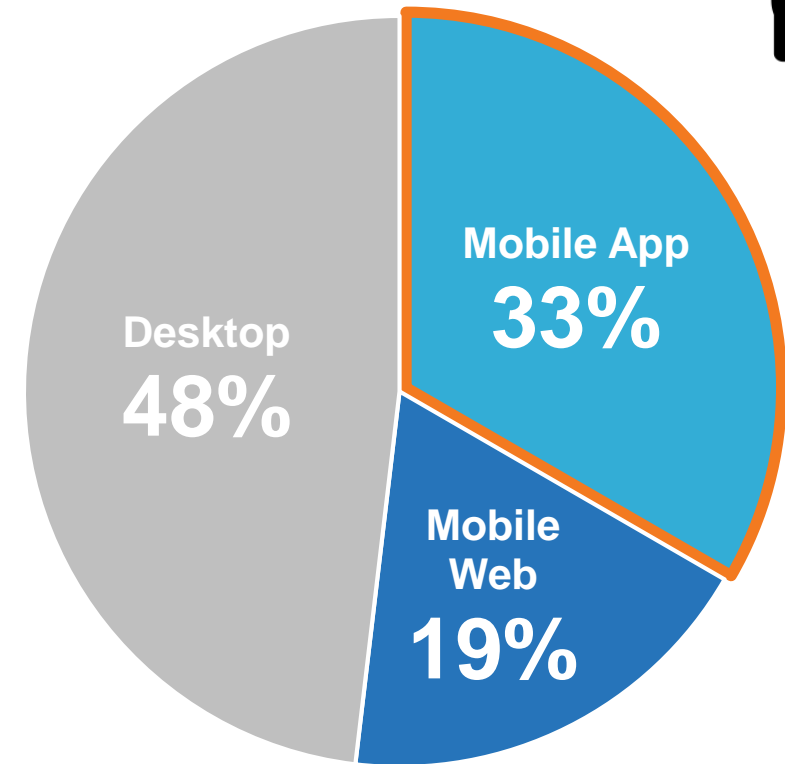
by Unique Visitors



Uber

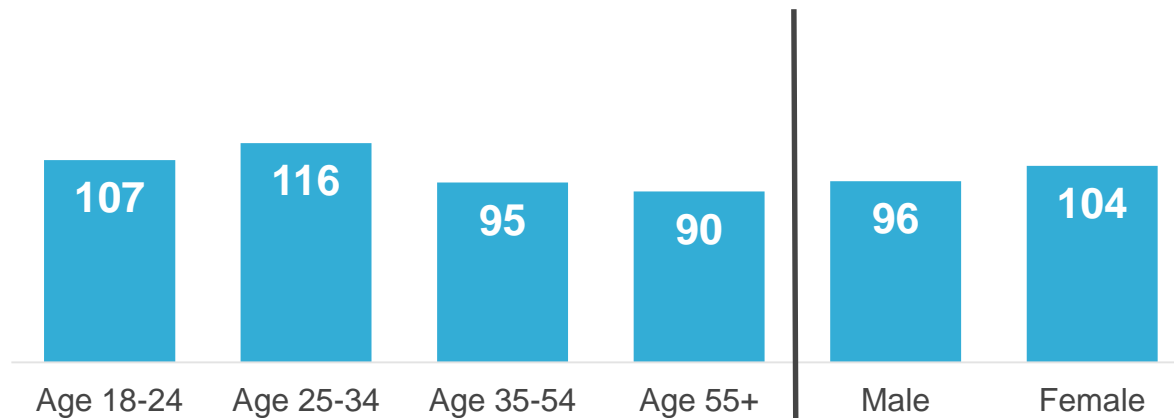
## Usage Breakdown

by Share of Category's Total Digital Time Spent



## Demographic Profile

Index of Category vs. Total App Audience



# Sports Apps: Category Snapshot



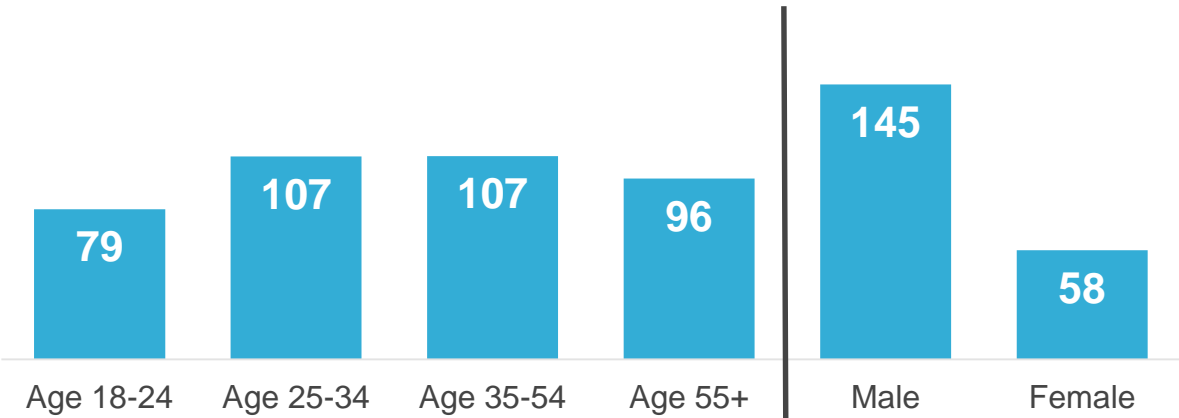
## App User Penetration

% Reach of Total App Audience

23%

## Demographic Profile

Index of Category vs. Total App Audience



## #1 Ranked App

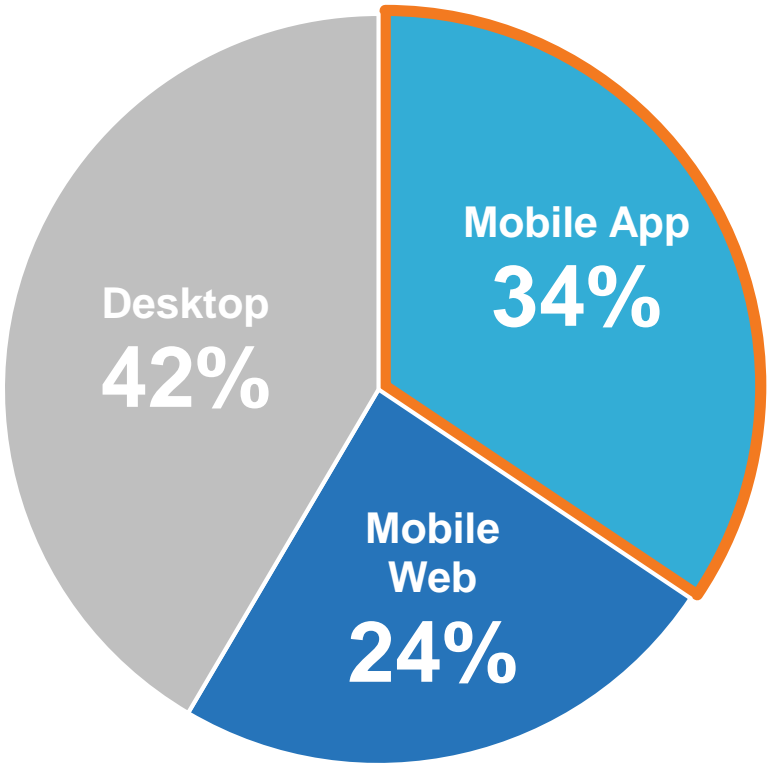
by Unique Visitors



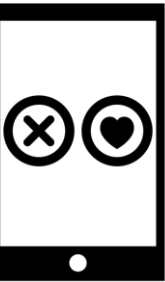
ESPN

## Usage Breakdown

by Share of Category's Total Digital Time Spent



# Dating Apps: Category Snapshot



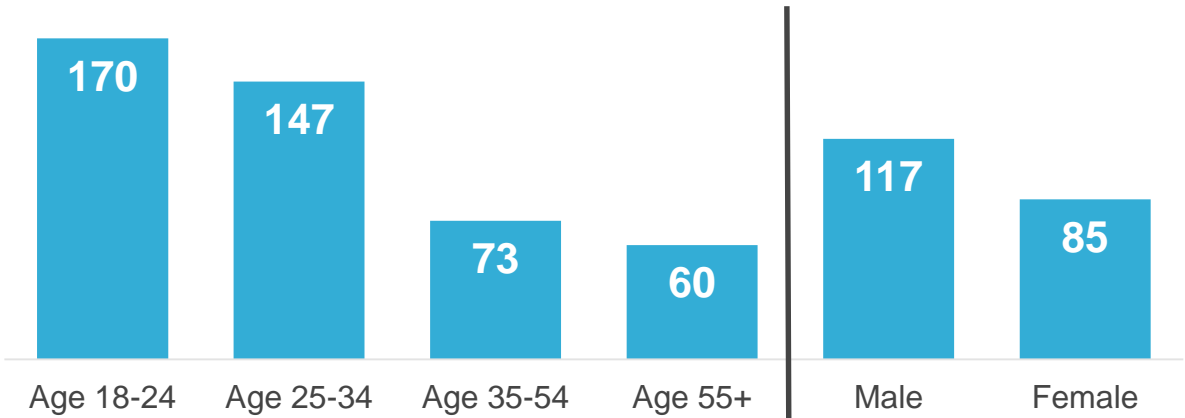
## App User Penetration

% Reach of Total App Audience

11%

## Demographic Profile

Index of Category vs. Total App Audience



## #1 Ranked App

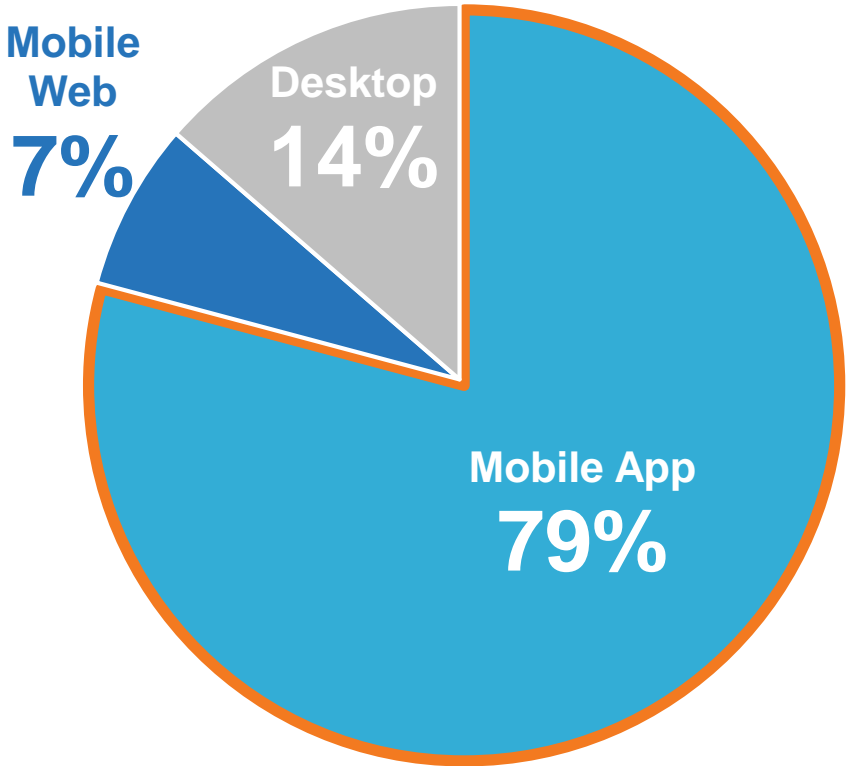
by Unique Visitors



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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