



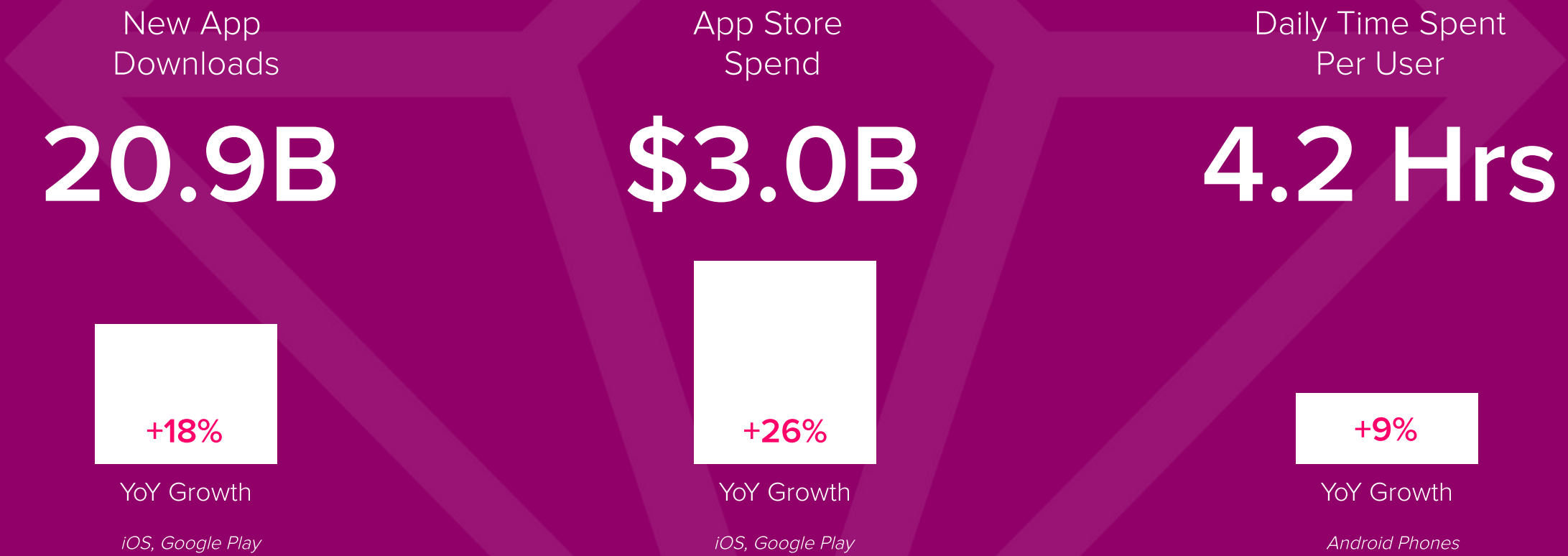
# How to Win On Mobile in LATAM

[appannie.com](https://appannie.com)





# The Latin American Mobile Landscape at a Glance: July 2020 — June 2021





# What's Inside

- [The LATAM Market: At a Glance](#)
- [Sizing the Mobile Market](#)
- [How Increased Digital Access Has Spurred Growth](#)
- [Mobile-First Gaming Market](#)
- [Spotlight on Shopping](#)



# The Mobile Performance Standard



Google

Tencent 腾讯



SAMSUNG

ebay



Walmart



SEGA

ACTIVISION

VISA



intuit

LIONSGATE

ROVIO

peak



kakao

CVS

PROGRESSIVE



SciPlay



OUTFIT7

JAM CITY

LINE





We're continuously working to make Pinterest a positive and inspiring place for everyone. In 2021, we focused on bringing the best of our new creators' experience and our solutions for brands in Latin America. We expect to continue our mission to inspire people in an inclusive and diverse environment together with our growing community of creators and to make this experience more actionable through our enhanced shopping surfaces.

**André Loureiro**  
**Managing Director for Latin America**  
**Pinterest**





With a solid omnichannel model and a successful digital strategy, Magalu has consolidated in the last year as the leader of formal retail in Brazil. Focused on its mission of promoting Brazilian retail digital transformation, Magalu strengthens its ecosystem through a marketplace model and new acquisitions covering logistics, financial services, food delivery and content. All of this converges in the strategy of increasingly create value to a single app, that offers multiple services on a customer-centric platform, promoting user engagement and higher retention rates.

**Marina Galvão**

**Performance Marketing & App Growth Manager**

**Magalu**





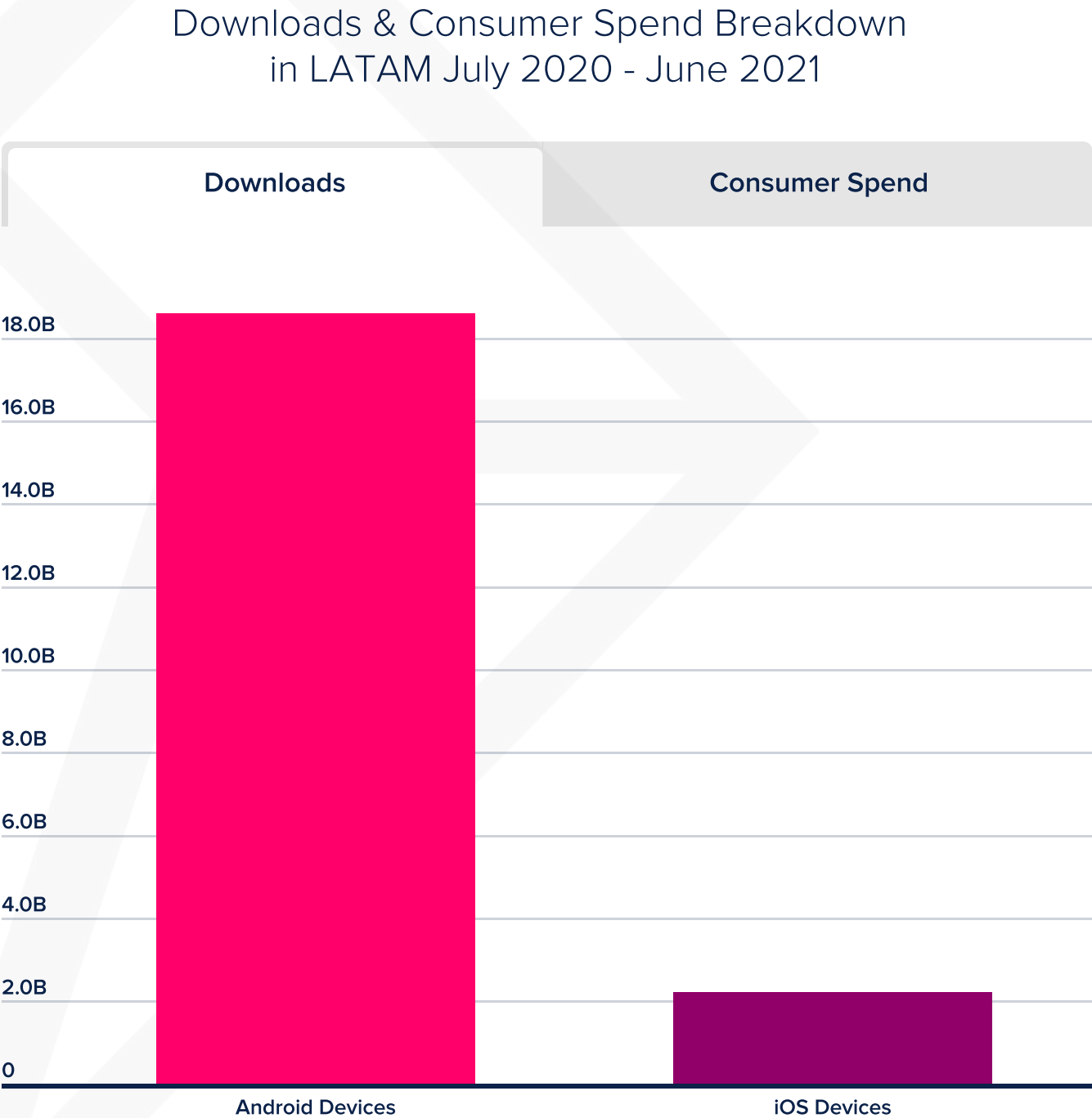
# The LATAM Market: At a Glance



# Reaching Mass Share is Critical to Success — Android Devices Drove 89% of App Downloads in LATAM Region

LATAM appears to be a sweet spot of mobile opportunity. When adapting a strategy for Android users vs. iOS users, factors like penetration and monetization potential should be considered carefully, along with the platform-unique behaviors. Use App Annie's market level data to assess opportunity and use insights from regional players to help inform your launch strategy on Android and iOS.

- LATAM represents a unique region in its distribution of downloads and spend by platform, revealing the importance of Android in the regions' growing mobile market.
- Downloads neared 21 billion in regional mobile market, and internet penetration continued to expand. Compared to spend, the share of downloads was significantly higher for Android devices, likely due to Operating System (OS) representation in the region.
- The consumer spend split between iOS and Google Play indicates positive monetization potential on mobile across both platforms. Consumer spend reached \$1.62 Billion on iOS (56%) and \$1.27 Billion on Android (44%) in LATAM compared to iOS commanding 65% of the market globally.



Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS, Google Play. Spend is gross — inclusive of any percent taken by the app stores.



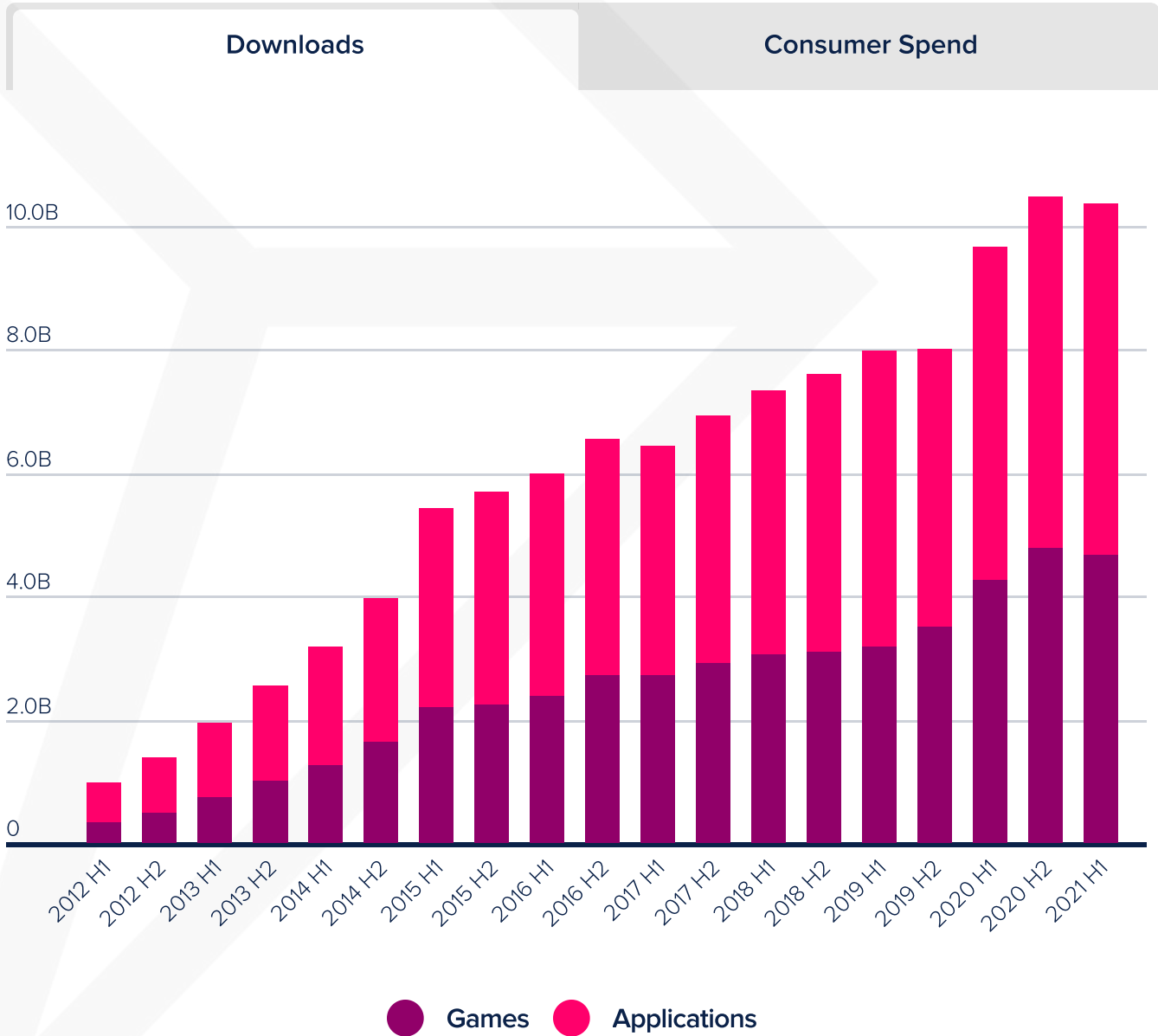


Mobile App Consumption in LATAM  
Shows an Increasing Share of the Global Market

# LATAM's Mobile Market Has Grown 76% Since H1 2019, Nearing \$1.6B on Mobile in H1 2021

The pandemic helped to accelerate growth on mobile in developing regions like LATAM.

- LATAM has seen strong adoption of mobile devices which has led to an increased share in the overall global market. From July 2020 - June 2021, the region generated 15% of total global downloads on iOS and Google Play.
- Consumer spend during June 2020 - July 2021 reached \$2.9 billion at 26% growth year-over-year.
- Games made up 50% of LATAM consumer spend in H1 2021, compared to worldwide average of 68% as share of non-gaming apps have gained more momentum.



Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS, Google Play. Spend is gross — inclusive of any percent taken by the app stores.



# Sizing the Mobile Market

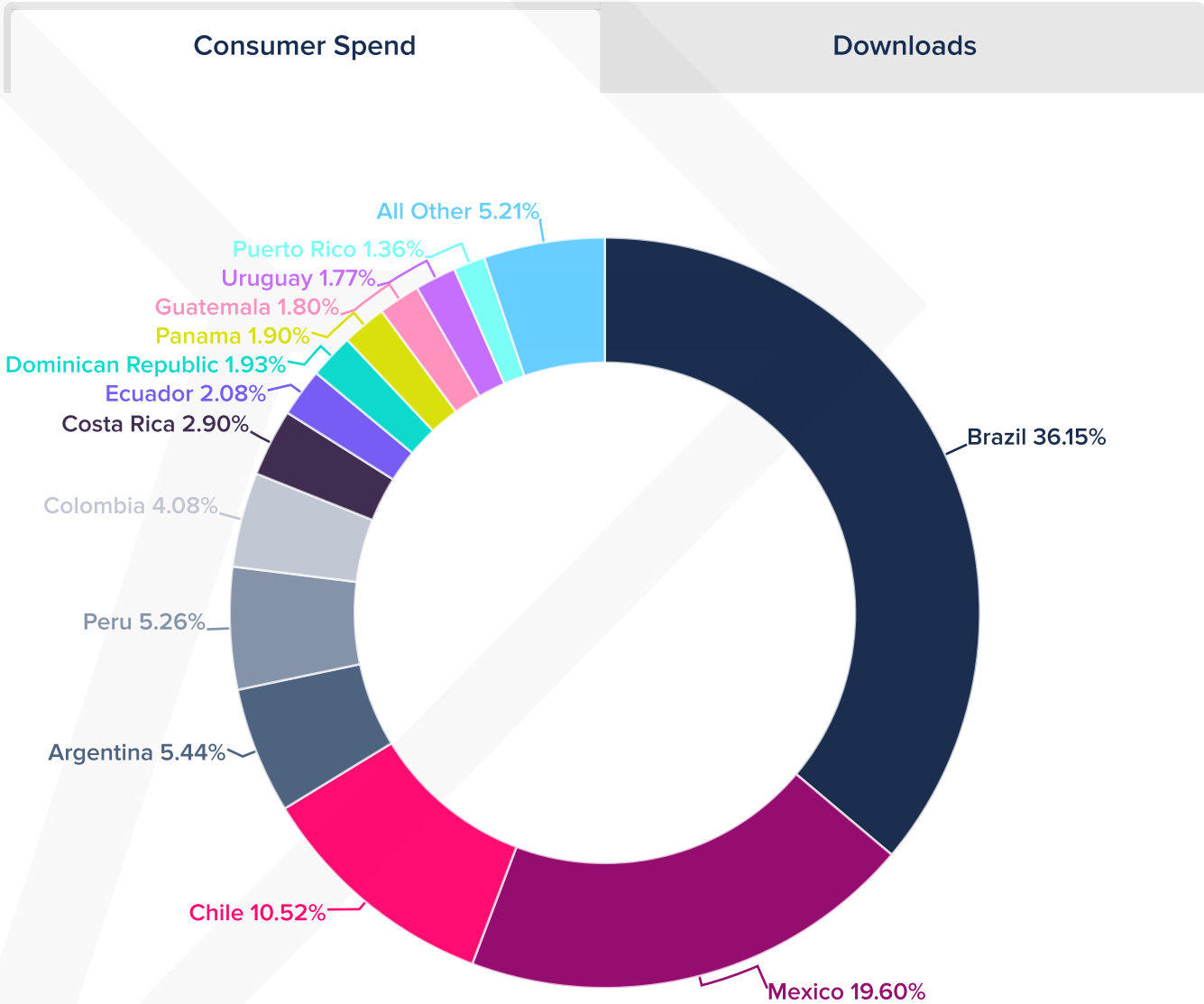


# Sizing the Market: Brazil & Mexico at the Forefront of LATAM's Growing Mobile Market

LATAM is made up of a variety of regions that have unique governmental and societal factors that influence that mobile landscape. Differences in market maturity levels along with regional regulations direct the mobile landscape for individual countries.

- The top 5 countries by consumer spend made up over 75% of all consumer spend in LATAM from July 2020 - June 2021. **Just two countries alone - Brazil and Mexico - generated 73% of LATAM's downloads during the period.**
- Countries with fewer downloads see a greater share of consumer spend because they have a higher per capita income. Uruguay for instance has only 3 million people (and 0.14% downloads) but the per capita income is \$16,000 (and 1.77% when it comes to consumer spend). Brazil's per capita income, for instance, is less than half that in Uruguay.
- The region is fragmented based on the pace of mobile and internet adoption in each country, population size and socioeconomic characteristics.

Country Level Breakdown of the LATAM Mobile Market  
July 2020 - June 2021



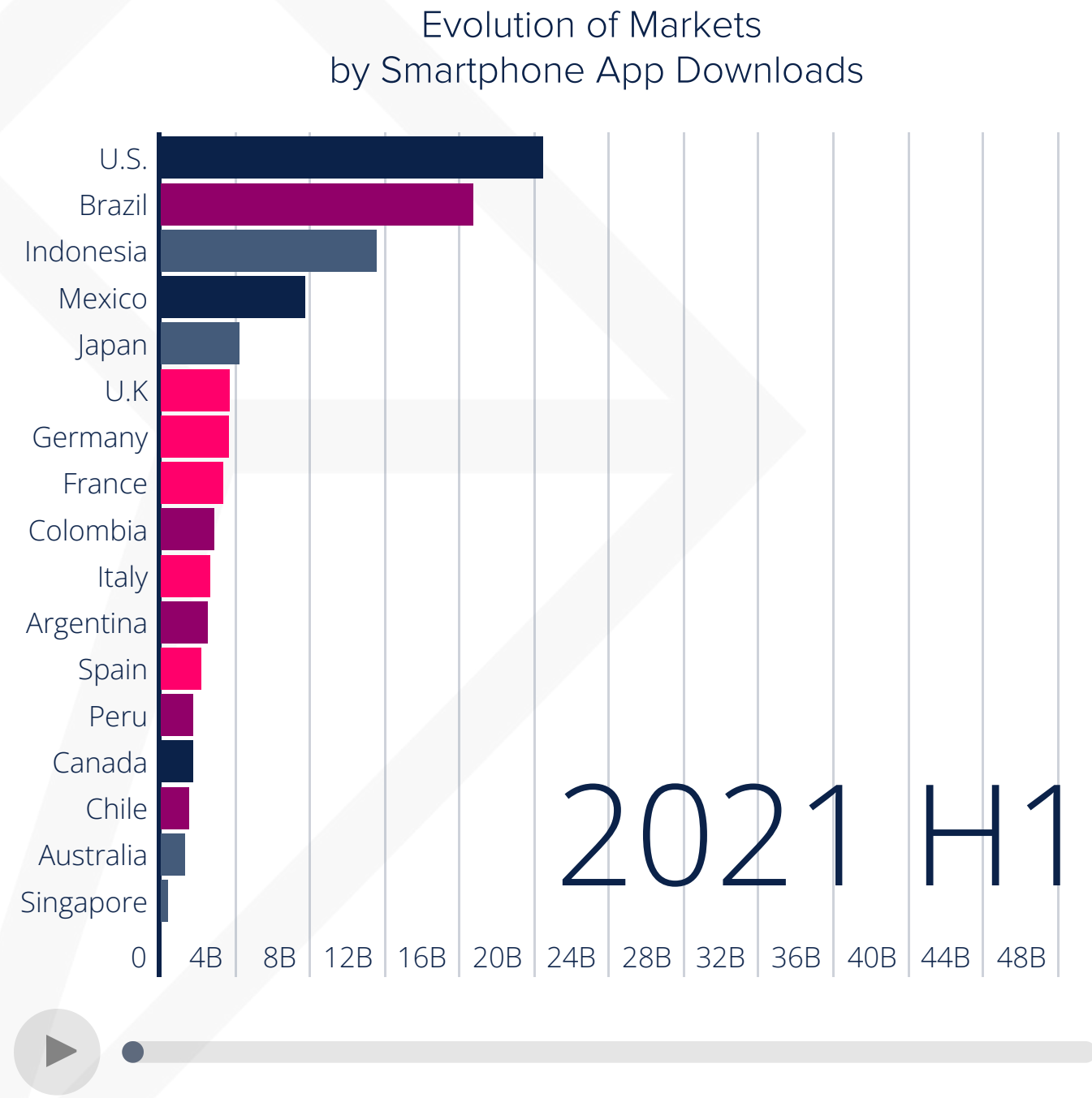
Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS and Google Play combined. Includes games and applications combined.



# While Brazil Was an Early Mobile Adopter in the Region, Other Countries in LATAM Have Started to Speed Past Top Markets for Downloads

The digital landscape in LATAM is evolving rapidly, and it is expected that the share of the population with smartphone access will increase to ~75% by 2025. To find success, you need to assess market penetration and usage consumption patterns on a region-by-region basis.

- In H1 2021, Brazil ranked at #3 behind India and the US by total downloads.
- Outside of Mexico and Brazil, other LATAM countries are climbing the ranks in recent years due to the rapid growth in mobile adoption and connectivity.
- Colombia's downloads surpassed Italy, Argentina, and Spain during H1 2021 — regions that had ranked above Colombia in downloads in 2019.



N.AMER LATAM EMEAR APAC

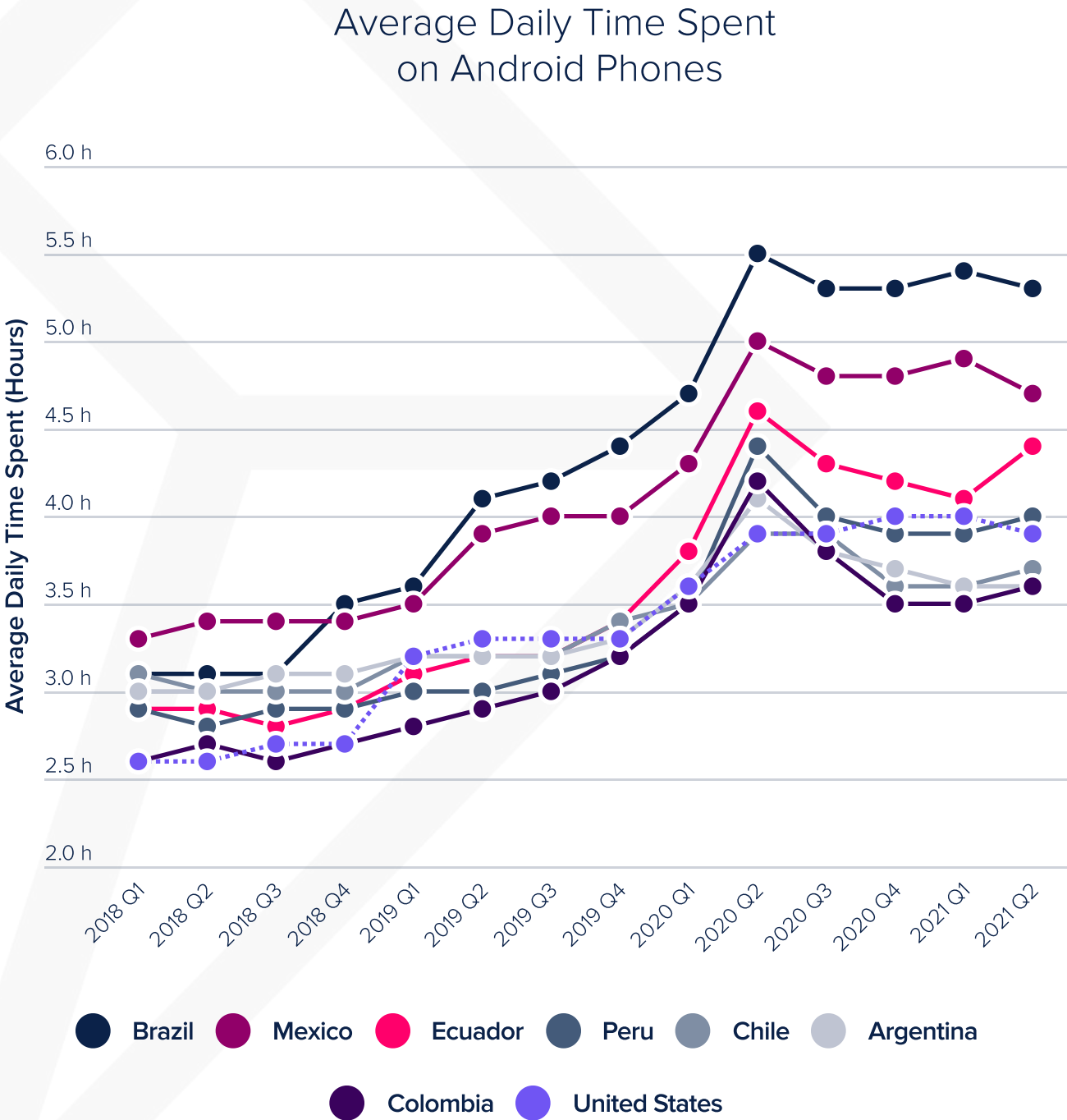
Source: App Annie Intelligence  
Note: Downloads across iOS, Google Play.



# Daily Time Spent on Android Phones in Latin American Countries Surpassed the U.S. in H1 2021 as Users Averaged 4.2 Hours on Mobile

LATAM's high growth rates coupled with some of the highest time spent on smartphones indicates strong market potential. Use App Annie's Top Apps report to see which apps are capturing greater share of time spent on mobile devices.

- Brazil and Mexico led in daily device time in H1 2021 — Up more than 3x compared to H1 2019.
- In Brazil, mobile took up 5.4 hours per user per day, up 6% from H1 2020 and 32% from H1 2019. Users in Mexico spent 4.8 daily hours on Smartphone devices in H1 2021, an increase of 15% vs. 1 year ago and 36% vs. 2 years ago.
- Chile, Argentina, and Colombia saw a surge in time spent in Q2, Q3 2020 driven by the pandemic, but device time has dipped slightly since — **as the number of connected households increases alongside improved technology and internet access, combined screen time is set to grow.**



Source: App Annie Intelligence  
Note: Average Daily Time Spent is on Android phones.



# How Increased Digital Access Has Spurred Growth in Mobile Engagement

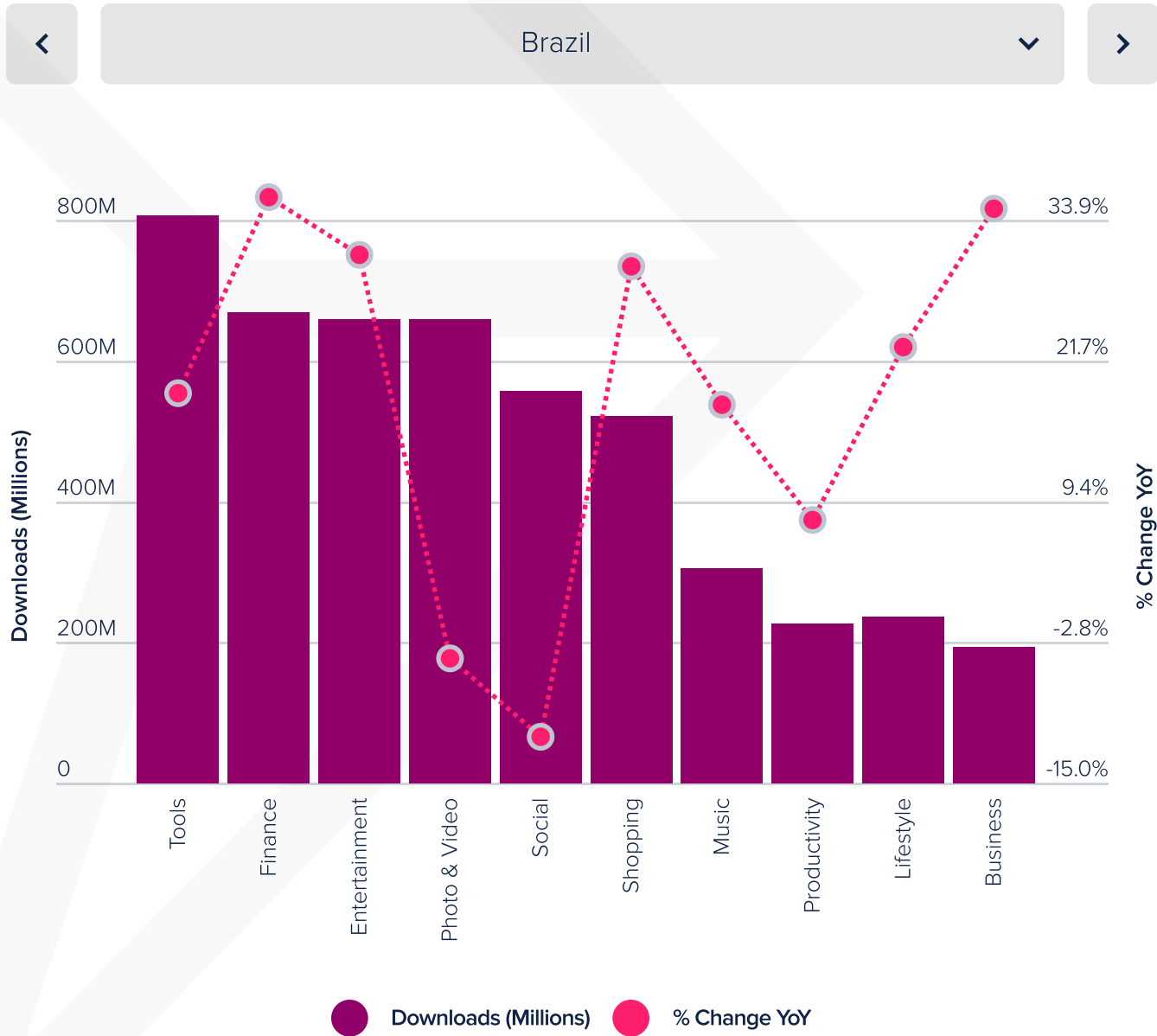


# Downloads of Finance & Shopping Apps Grew Across Top Countries in LATAM

Countries within LATAM sit at different stages of development so it is important to monitor trends across regions. Use App Annie data to gain insight into vertical growth on a more granular level.

- Tools was a top category among LATAM markets, dominated by mobile-security including anti-virus, privacy, and cleaning apps. In Brazil, Federal Government apps like Carteira Digital de Trânsito and gov.br fell into the Tools category which aided significantly in driving category share.
- **COVID-19 revved up the growth of Finance apps as users sought new ways of handling payments and income.** In Brazil, Finance apps reached over 670M downloads from July 2020 - June 2021, a 36% increase year-over-year.
- **Shopping apps took off during COVID-19, with Brazil downloads growing 30% year-over-year.** As retailers looked to mobile to drive sales and build loyalty during this time, several top retailers created a special customer service approach for users that offered the first purchase through the app. Other retailers like Magazine Luiza expanded their distribution center and physical stores to facilitate and decrease delivery time on App Purchases/Digital Purchases.

Top Categories by Downloads in LATAM Regions  
July 2020 - June 2021



Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS and Google Play combined.



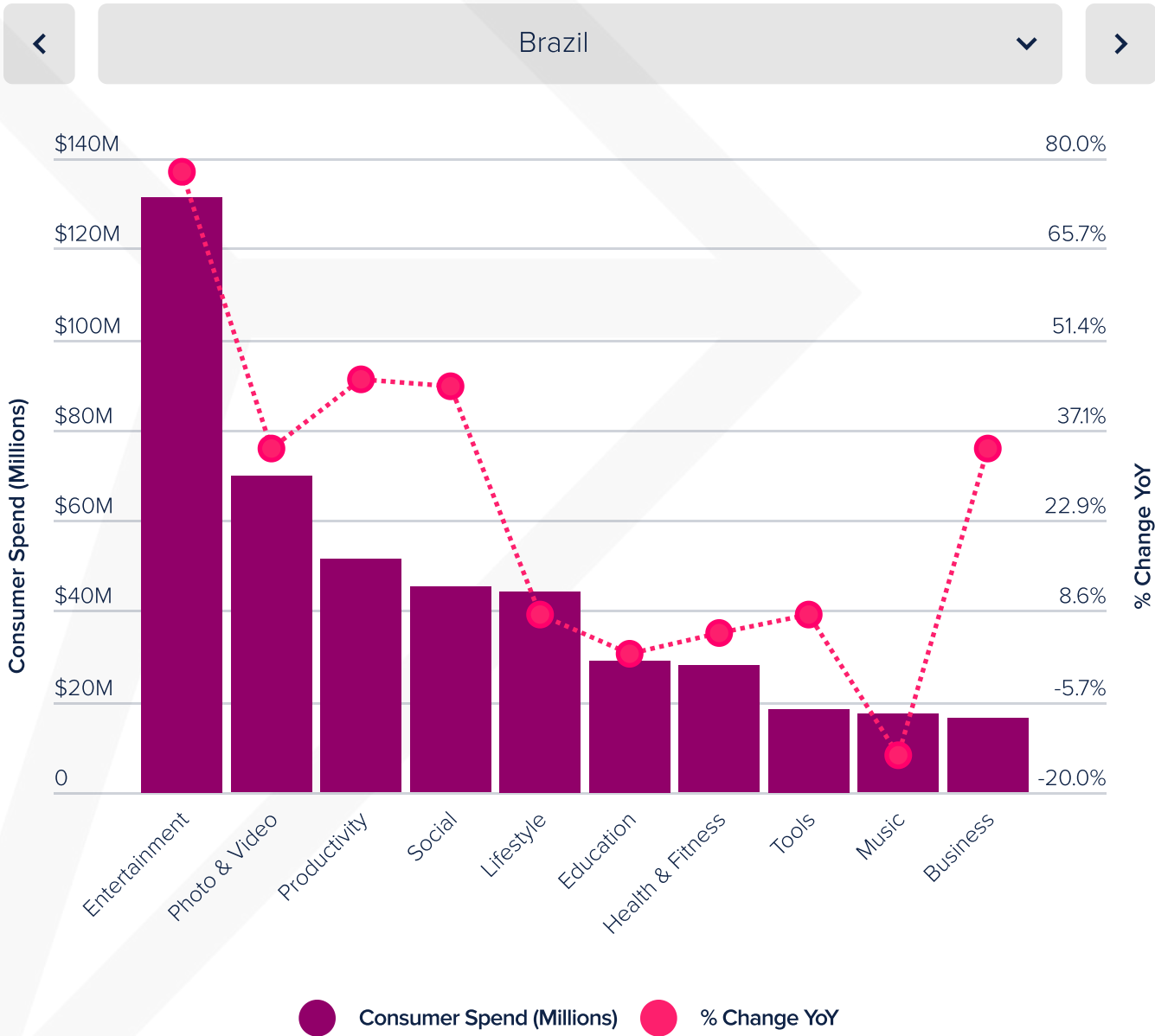


# Limited access to Smart TV's is fostering streaming on mobile, making Entertainment a top category by consumer spend in LATAM

It is important to consider access vs. value when developing a strategy for LATAM. Pivoting subscription offerings and product price point play a critical role in a successful LATAM break-through. In the Brazilian market, HBO Max offers a mobile-only subscription that allows users to access content in app-only at a reduced subscription price.

- Outside of games, Entertainment was the largest category by consumer spend across four of the six largest countries in LATAM.
- Health & Fitness was the #1 category by spend in Colombia during the period. In Argentina, consumers spent the most in Photo & Video apps.
- Top growing Photo & Video apps by consumer spend appeared to be complimentary to other growing app categories including business, social, and games. Notable apps included graphic design platform [Canva](#), editing apps like [Mojo - Story Editor](#), [InShot](#), and [Adobe Lightroom](#), and live streaming app [Twitch](#).

Top Categories by Consumer Spend in LATAM Regions  
July 2020 - June 2021



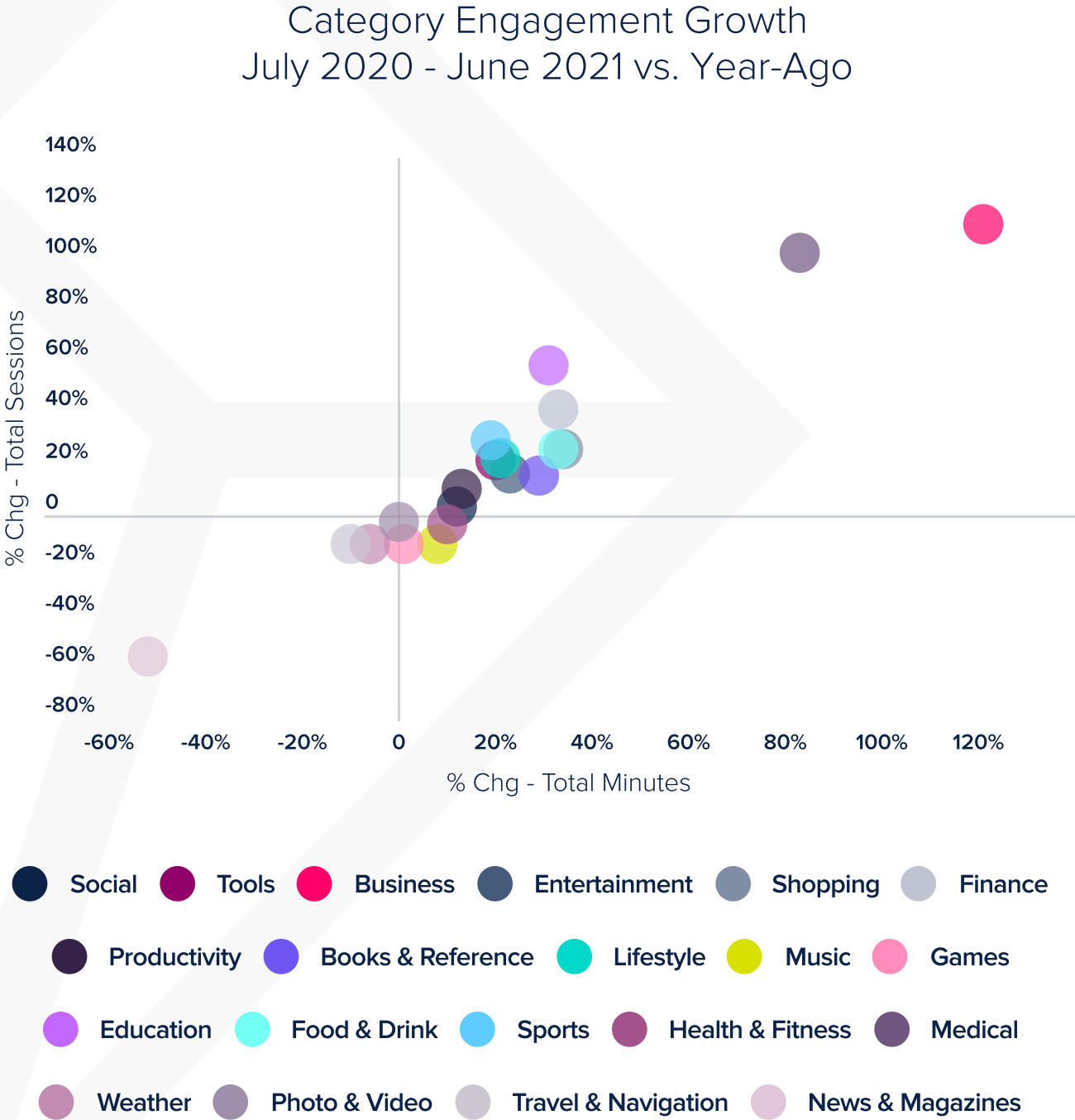
Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS and Google Play combined.





# Identify Top Performing Categories in LATAM: Business & Medical Led Growth in Sessions and Time Spent

- Use mobile market estimates to monitor the market post-COVID and to identify nascent emerging and disruptive trends.
- **COVID-19 lockdown measures drove growth in "daily-living" functions like Business, Medical and Education.** LATAM is one of the top regions in terms of longest hours at work — for mobile, this could be an opportunity to create apps and features within the Education and Business categories that help improve skills and productivity.
  - **Contactless payment technology continues to see increasing adoption in LATAM,** and new neobanks, digital wallets, contactless credit cards, and other FinTech apps are surging. The Latin American FinTech market experienced a 41% increase in sessions during the period, and is expected to gain rapid momentum over the next few years.



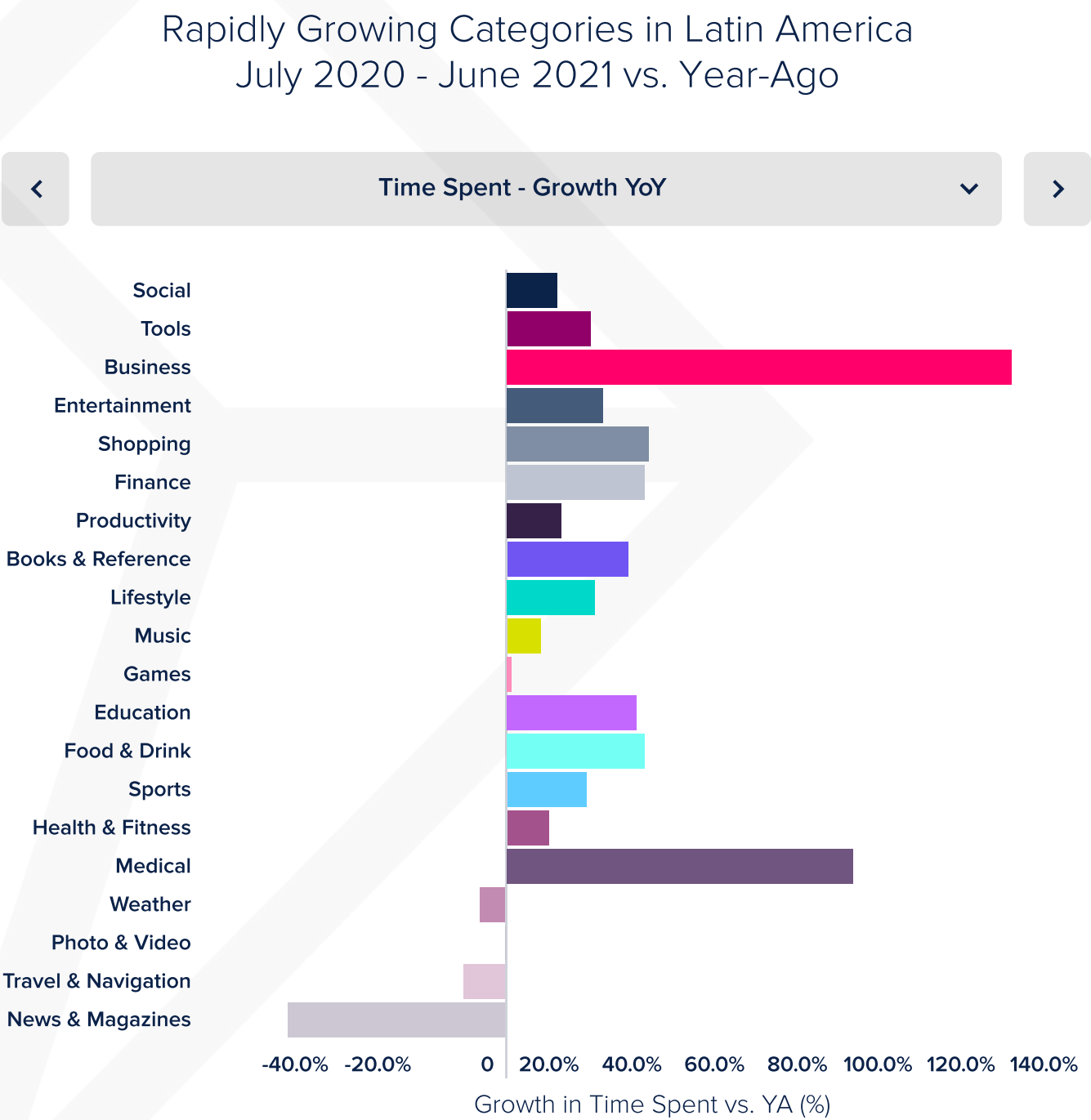
Source: App Annie Intelligence Note: Hours Spent and Sessions Spent represent Android phones. Legend order reflects rank by share in LATAM across categories. Data supports top seven LATAM countries by time.



# Social Occupied Over 25.9 Billion User Hours as Latin Americans Continued to Seek Out Peer-to-Peer Connection

High growth in sessions and time spent will mean more consumer spend will shift towards mobile. Use mobile market estimates to monitor early and plan in advance for emerging and disruptive trends.

- Latin American mobile consumers spent the most time in Social apps, spending more than 25.9 billion hours on their favorite Social apps during the period.
- Growth was largely driven by Social Communication tools like WhatsApp, Social Media platforms such as Facebook, Instagram, and Twitter, and Social Entertainment apps like TikTok.
- Sessions spent in Finance apps grew by 41% in LATAM. Mobile wallets and contactless credit cards have become increasingly popular, growing Shopping sessions by 26%.



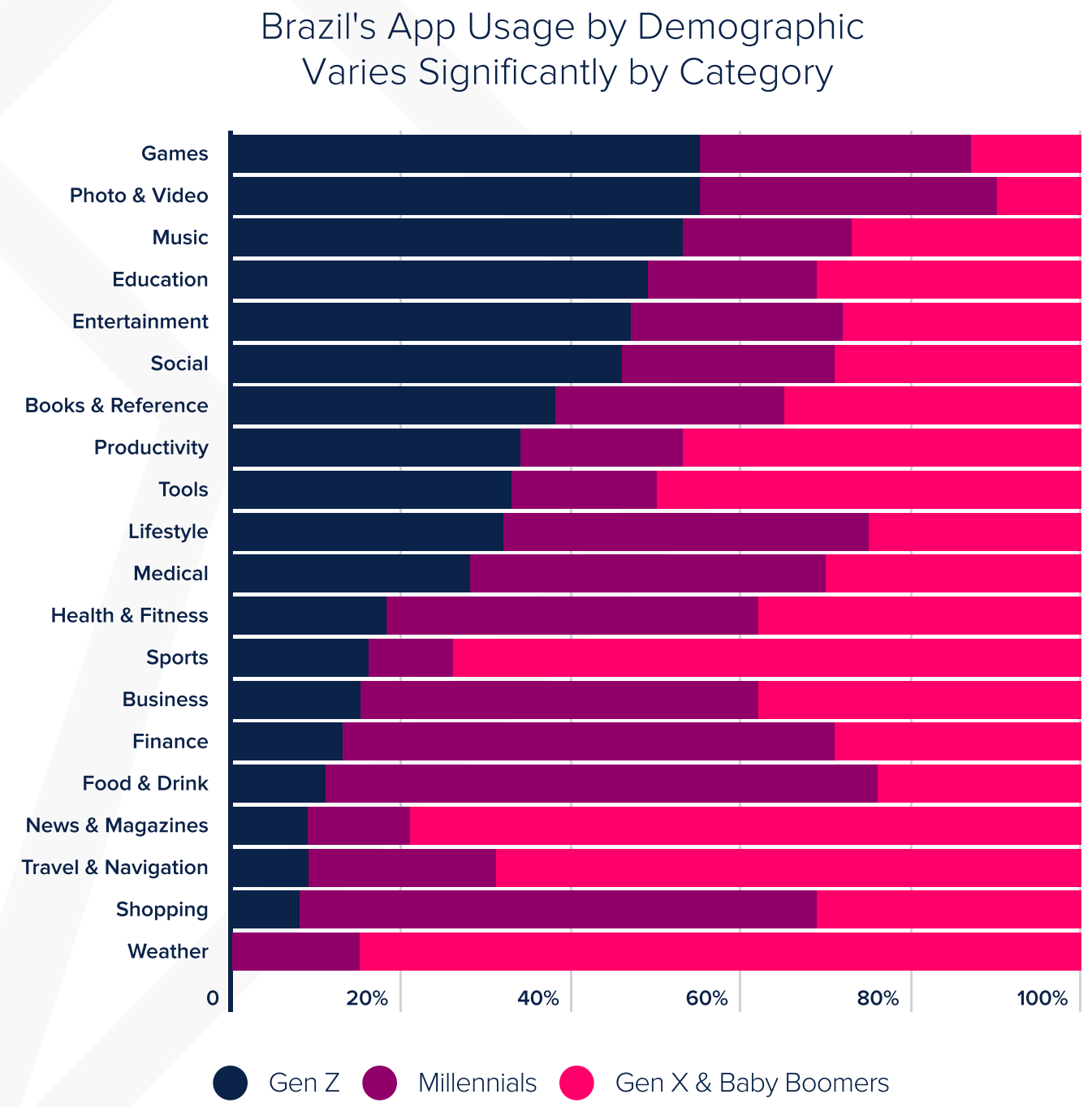
Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS, Google Play. Spend is gross — inclusive of any percent taken by the app stores; Hours Spent is on Android phones



# Brazil's Large, Young Audience Pushed Mobile Market Growth in All Things "Digital Entertainment"

Understanding Gen Z's likelihood of engaging with your category is important when setting benchmarks. This is particularly important in Brazil where the user demographics lean toward a young population. Use App Annie demographics data to evaluate unique user demographics within your category.

- **LATAM has a very young internet audience.** Population data from 2021 shows that Brazil has an average age of thirty-three, which is 5-years lower than the average age in the U.S.
- **Categories that heavily lean towards Gen Z are also leading in revenue.** Games, Photo & Video, and Entertainment are winning amongst this audience.
- **In Brazil, 61% of Shopping app users were Millennials.** They also were the biggest users of apps in the Finance and Food & Drink categories, making up 58% and 65% of users.



Source: App Annie Intelligence Note: July 2020 - June 2021, iPhone and Android phones; Share of top 100 apps by MAU per Category where each demographic groups are most likely to use. Gen Z represented by those aged 16 -24; Millennials represented by those aged 25-44; Gen X and Baby Boomers represented by those aged 45+



# Discover the Movers & Shakers Among Top Categories in LATAM

Top Breakout Apps by Downloads, H1 2021 vs. H1 2020

Entertainment		Finance		Shopping		Photo & Video		Social		Education		Food & Drink		Health & Fitness	
Brazil		Mexico		Colombia		Argentina				Peru				Chile	
1	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+	Disney+
															
2	Pluto.tv	Tubi TV	TikTok	WOMBO	BOOYAH Live	REFACE: face swap videos	Pluto.tv	WOMBO	REFACE: face swap videos	Pluto.tv	WOMBO	REFACE: face swap videos	Pluto.tv	WOMBO	REFACE: face swap videos
															
3	VIX	BOOYAH Live	Pluto.tv	REFACE: face swap videos	Pluto.tv	WOMBO	REFACE: face swap videos	Pluto.tv	WOMBO	REFACE: face swap videos	Pluto.tv	WOMBO	REFACE: face swap videos	Pluto.tv	WOMBO
															
4	WOMBO	FunimationNow	VIX	VIX	TikTok	STARZPLAY	WOMBO	STARZPLAY	VIX	Crunchyroll	WOMBO	STARZPLAY	WOMBO	STARZPLAY	WOMBO
															
5	REFACE: face swap videos	Paramount+ International	WOMBO	STARZPLAY	VIX	Crunchyroll	WOMBO	STARZPLAY	VIX	Crunchyroll	WOMBO	STARZPLAY	WOMBO	STARZPLAY	WOMBO
															

**Source: App Annie Intelligence** Note: Top Apps by year-over-year Downloads Growth across iOS, Google Play. Jan 2021 - June 2021 year-over-year change. Apps that are listed across Photo & Video, Social, and Entertainment categories were included in only one ranking table. Across all categories, ranking table reflects top breakout apps that fall within the store category. removing apps that are unrelated to the category definition. Within Social, government apps were excluded.



# Trends in LATAM's Mobile-First Gaming Market

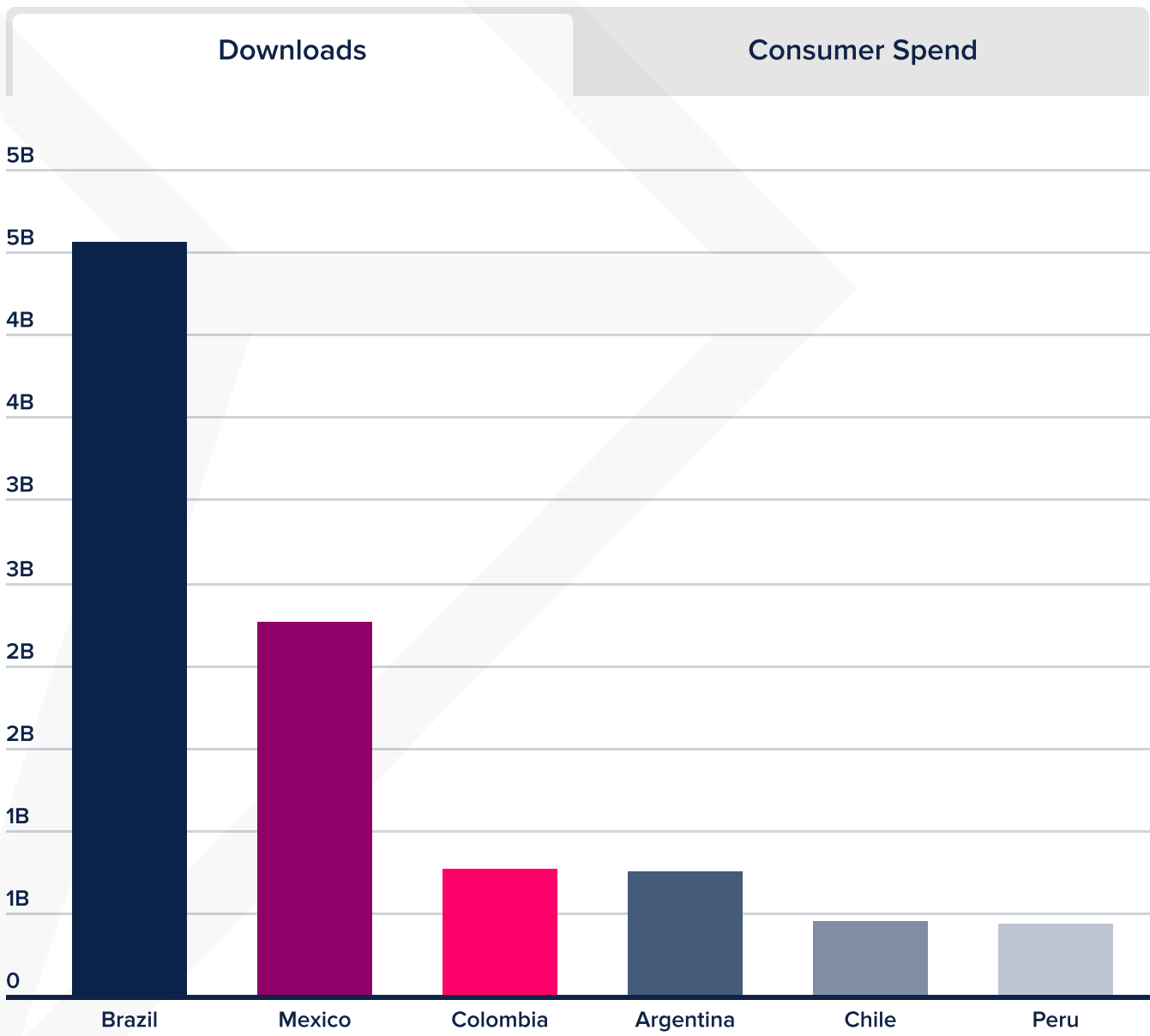


# LATAM's Booming Mobile Gaming Market Could Offer Positive Monetization Potential for Developers in the Region's Unique Mobile-First Gaming Market

Since TV ownership is low, Latin Americans Look to Mobile when it comes to Gaming. Nearly all countries revealed a booming gaming market for downloads and consumer spend. Use App Annie data to understand how competitors drove success in each market.

- The mobile gaming market showed promising potential as gaming apps jumped 33% in spend and 21% in downloads across LATAM.
- **Brazil led in downloads and revenue**, growing downloads by 22% YoY to 4.6 Billion and growing consumer spend 36% YoY to a \$557 Million from June 2020 - July 2021.
- **Consumer spend in Chile was especially strong relative to downloads.** The mobile gaming market revealed tremendous gains in consumer spend, increasing 77% YoY to \$183 Million in spend during the period.

Country Breakdown of the Mobile Gaming Market in LATAM  
July 2020 - June 2021



Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS and Google Play combined; Data reflects LATAM countries that had at least 100 M category downloads from July 2020 - June 2021





LATAM Mobile Gaming Genre Breakdown  
July 2020 - June 2021

Download

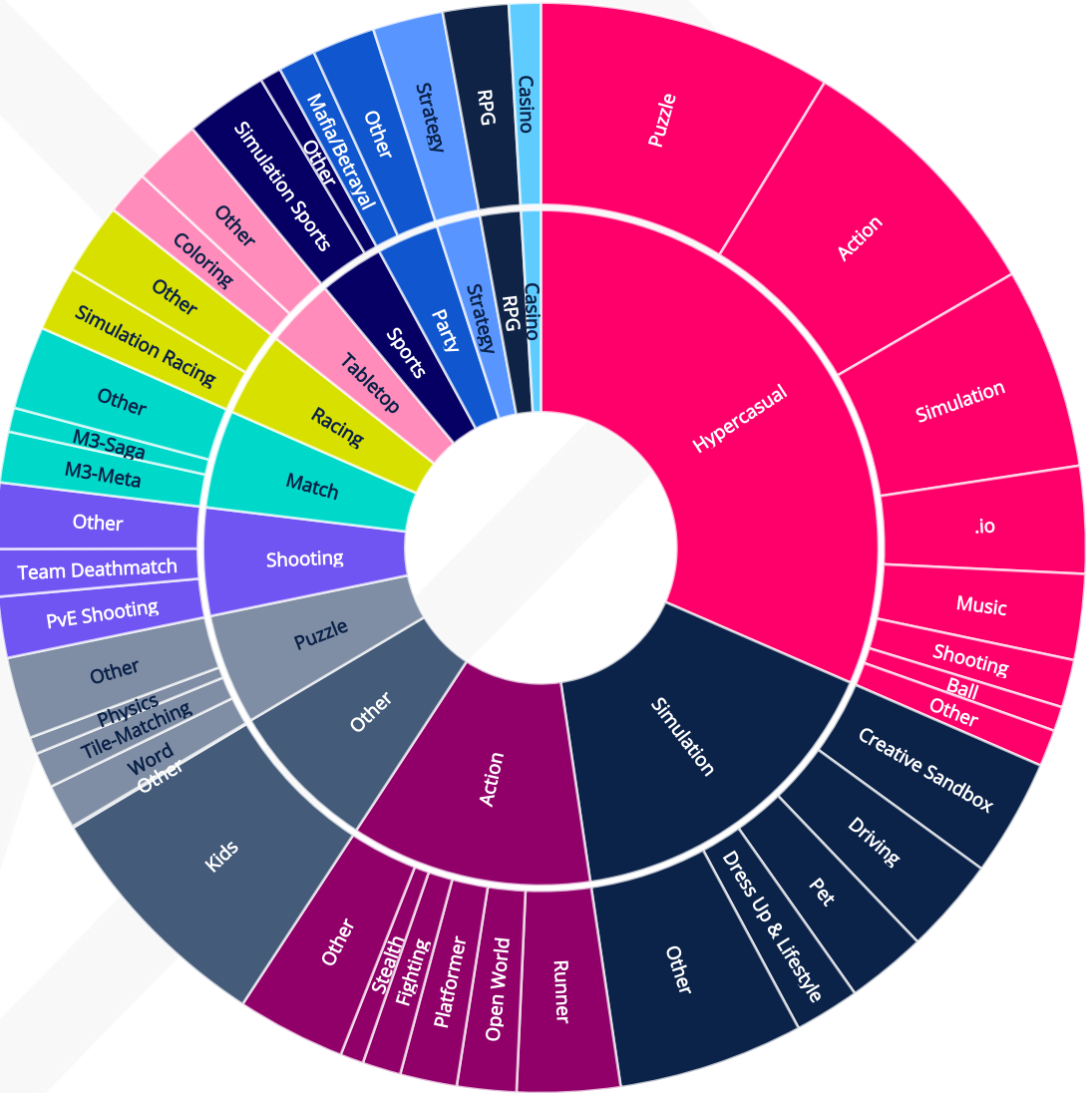
Total Hours

Consumer Spend

# Use Game IQ to See Which Genres Have the Most Share in Latin America's \$1.46B Mobile Gaming Market

Leverage App Annie's Game IQ to uncover detailed market opportunities, build products catered to your subgenre, and analyze granular gamer preferences.

- Across LATAM, Gaming apps reached 9.42 Billion downloads and \$1.46 Billion in consumer spend overall.
- Core subgenres (Simulation, Strategy, RPG, and Shooting) generated 60% of total spend but drove a much lower share of downloads at 25%. Hypercasual games led in app downloads, making up 32% of all downloads.
- Notable gaming segments included 4X March Battle - Strategy games with \$135.8M in spend (+66% YoY), Creative Sandbox - Simulation games with \$80.0M in spend (+101% YOY), and Luck Battle - Party games with \$52.8M in spend (+637% YoY).



Source: App Annie Intelligence Note: Downloads and Consumer Spend are across iOS and Google Play combined.



# Discover the Games Leading the LATAM Market

## Top Games in H1 2021

Brazil				Mexico				Colombia				Argentina				Peru				Chile			
Downloads				Consumer Spend				Monthly Active Users															
1		Coin Master	1		Free Fire	1		ROBLOX															
2		Free Fire	2		Coin Master	2		Free Fire															
3		Crash Bandicoot: On the Run	3		ROBLOX	3		Among Us!															
4		League of Legends: Wild Rift	4		Lords Mobile	4		Minecraft Pocket Edition															
5		ROBLOX	5		PUBG MOBILE	5		Coin Master															
6		Craftsman: Building Craft	6		Call of Duty: Mobile	6		PK XD															
7		Among Us!	7		League of Legends: Wild Rift	7		Brawl Stars															
8		PK XD	8		Brawl Stars	8		Candy Crush Saga															
9		Phone Case DIY	9		Gardenscapes - New Acres	9		Pokémon GO															

Source: App Annie Intelligence Note: Top Apps from Jan 2021 - June 2021. Downloads and Consumer Spend data is across iOS and Google Play combined. Monthly Active Users data is based on iPhone and Android phones.





# Spotlight on Shopping

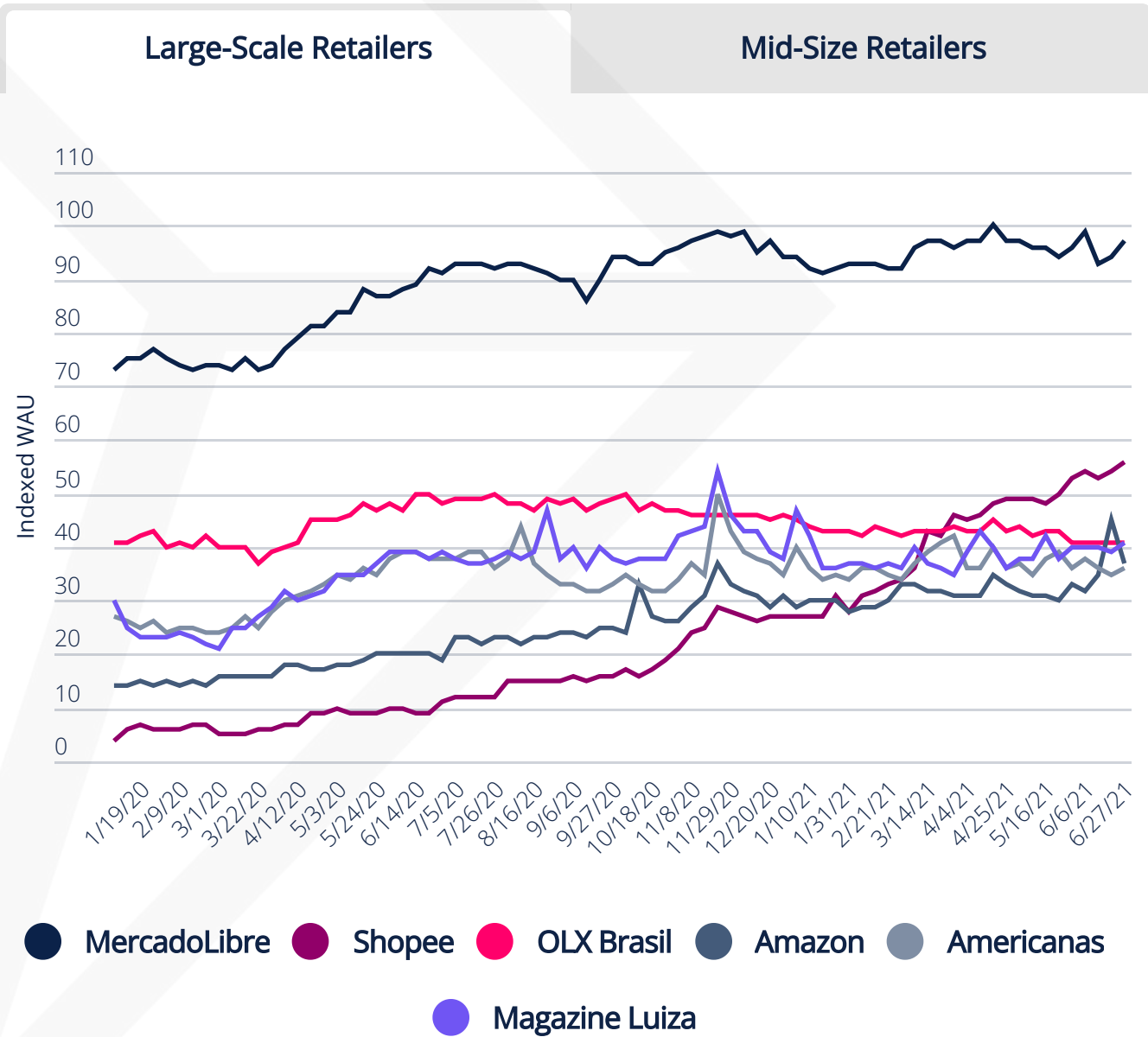


Weekly Active Users of Shopping Apps in Brazil  
January 2020 - June 2021

# Shopee's Rapid Success Indicates There is Still Room for Non-LATAM Publishers to Grow in the Retail Market

Leverage usage data from App Annie to analyze seasonality trends and gather insights around competitive performance.

- After launching in Brazil in Oct 2019 just before COVID-19, Shopee took less than two years to rise to the top, ranking as the #1 Shopping app by iOS and Google Play downloads and by Android phone time spent in Q2 2021.
- Shopee's use of gamification has expedited growth in Brazil. Within the app, users can participate in mini-games where they can earn coupons if they win.
- Although foreign publishers are gaining traction in LATAM, four of the top five apps by average MAU in Q2 2021 were LATAM-HQ'd. Argentina's MercadoLibre ranked #1, followed by Brazil's Americanas (#3), Magazine Luiza (#4) and OLX Brasil (#5).
- Among the foreign-HQ'd apps ranking in the top 10 shopping apps by MAU in Brazil during Q2 2021 was Amazon (#7) and SHEIN (#10).



Source: App Annie Intelligence Note: Weekly Active Users on Android phones



# App Annie Fuels Successful Mobile Experiences & Monetization





# Disclaimer

App Annie is a mobile market estimate service provider. App Annie is not registered in any investment advisory capacity in any jurisdiction globally, and does not offer any legal, financial, investment or business advice. Nothing contained in this communication, or in any App Annie products, services or other offerings, should be construed as an offer, recommendation, or solicitation to buy or sell any security or investment, or to make any investment decisions. Any reference to past or potential performance is not, and should not, be construed as a recommendation or as a guarantee of any specific outcome. You should always consult your own professional legal, financial, investment and business advisors.



# Thank You

[Request a Demo](#)

[appannie.com](https://appannie.com)