INDIA: MOBILE MARKET SPOTLIGHT

A Booming Mobile Economy

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What's Inside

The Mobile Performance Standard

Some of the largest and most innovative mobile companies
have partnered with App Annie

India

Market Overview

Top Markets by App Store Downloads, Consumer Spend & Hours Spent in 2020
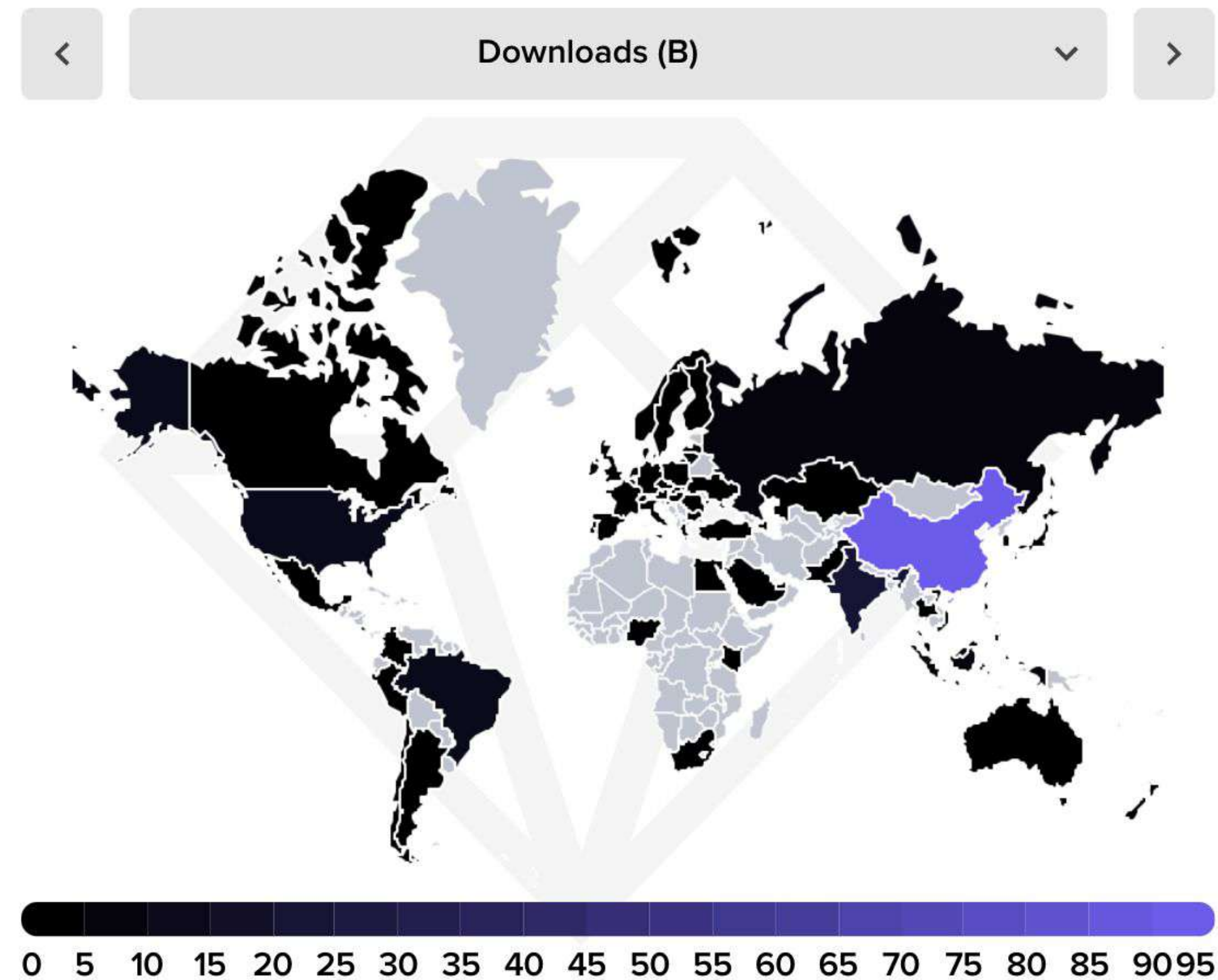
Downloads (B)

0 5 10 15 20 25 30 35 40 45 50 55 60 65 70 75 80 85 90 95
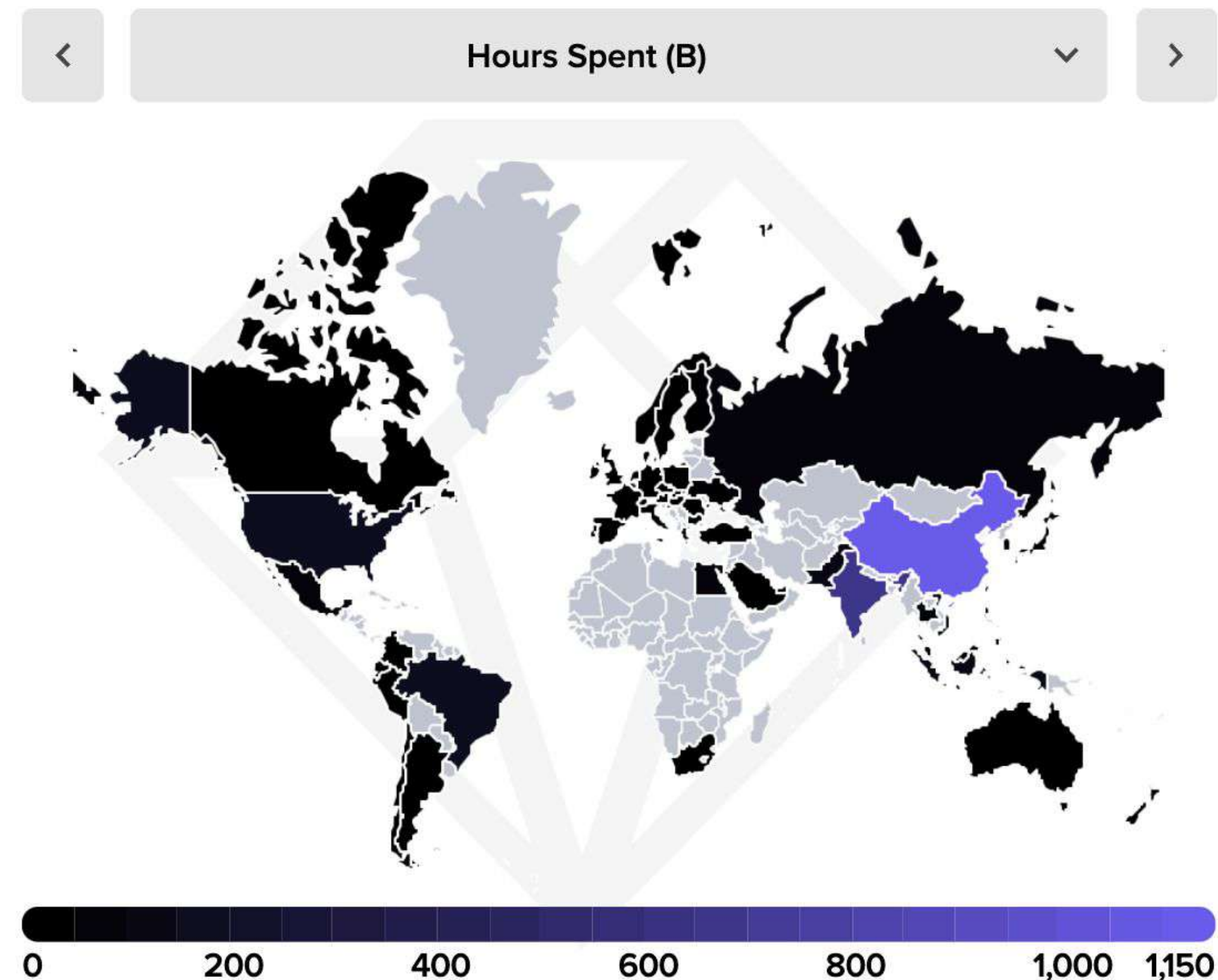
Source: App Annie Intelligence *Note: Downloads and Consumer Spend are across iOS, Google Play, Third-Party Android in China combined; Spend is gross — inclusive of any percent taken by the app stores; Hours Spent is on Android phones*

24 Billion Downloads in India in 2020

- Total Downloads increased by 28% year over year
- Top categories for downloads were: Games, Social Apps and Entertainment Apps
- India ranked #2 by downloads in 2020 globally after China

Top Markets by App Store Downloads, Consumer Spend & Hours Spent in 2020

| < | Hours Spent (B) ∨ | > |

Scale: 0 | 200 | 400 | 600 | 800 | 1,000 | 1,150

Source: App Annie Intelligence *Note: Downloads and Consumer Spend are across iOS, Google Play, Third-Party Android in China combined; Spend is gross — inclusive of any percent taken by the app stores; Hours Spent is on Android phones*
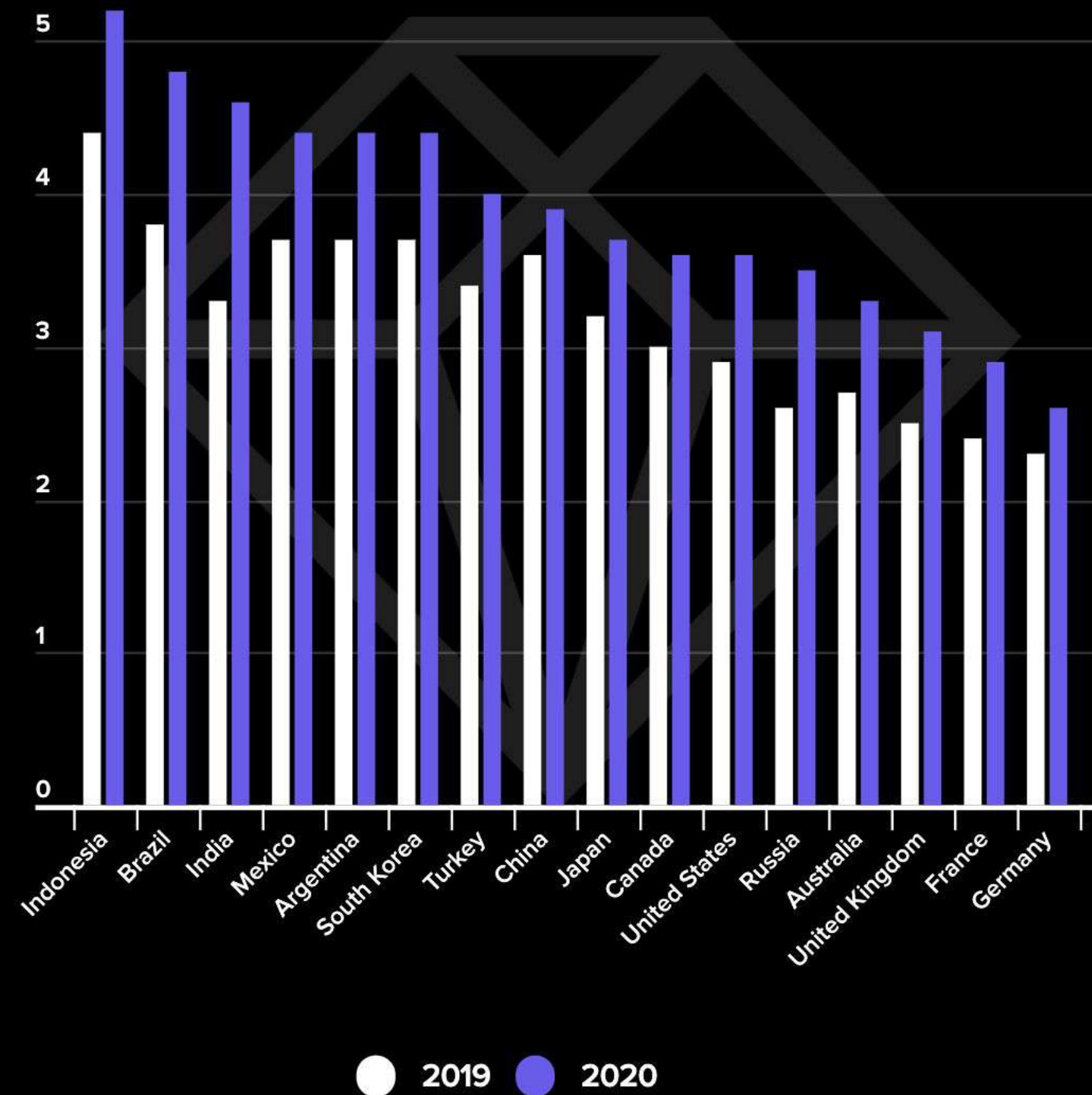
651 Billion Hours Spent in Mobile Apps & Games in India in 2020 on Android Phones

- Top apps are within Social & Entertainment categories: YouTube, WhatsApp Messenger & Facebook
- YouTube and Whatsapp Messenger increased by 33 billion minutes each on Android phone devices versus 2019

Average Hours Spent on Mobile Per Day Per User

Source: App Annie Intelligence
Note: Android phones

In India the Average User Spent 4.6 Hours Each Day on Android Phones

- Average time spent per user grew 40% from 3.3 hours per day in 2019 driven by surging mobile adoption during the COVID-19 pandemic
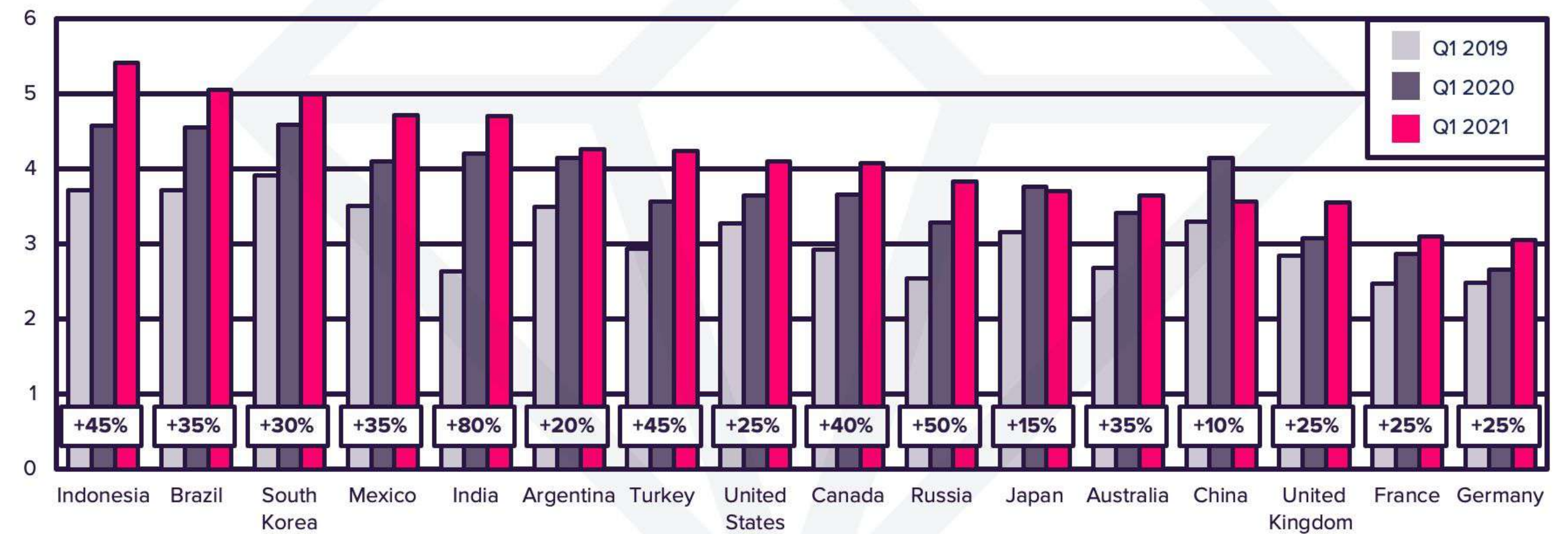
80% Increase in Average Daily Hours Spent in Apps in Q1 2021 vs Q1 2019 in India

- Daily time spent passed four hours in India for the first time in Q1 2020.

- India is the among the most mobile-first markets in the world with some of the highest daily time spent in apps.

Avg. Daily Hours Spent in Apps
Select Markets

Legend: Q1 2019, Q1 2020, Q1 2021

Market	Increase
Indonesia	+45%
Brazil	+35%
South Korea	+30%
Mexico	+35%
India	+80%
Argentina	+20%
Turkey	+45%
United States	+25%
Canada	+40%
Russia	+50%
Japan	+15%
Australia	+35%
China	+10%
United Kingdom	+25%
France	+25%
Germany	+25%

Note: Android phones.
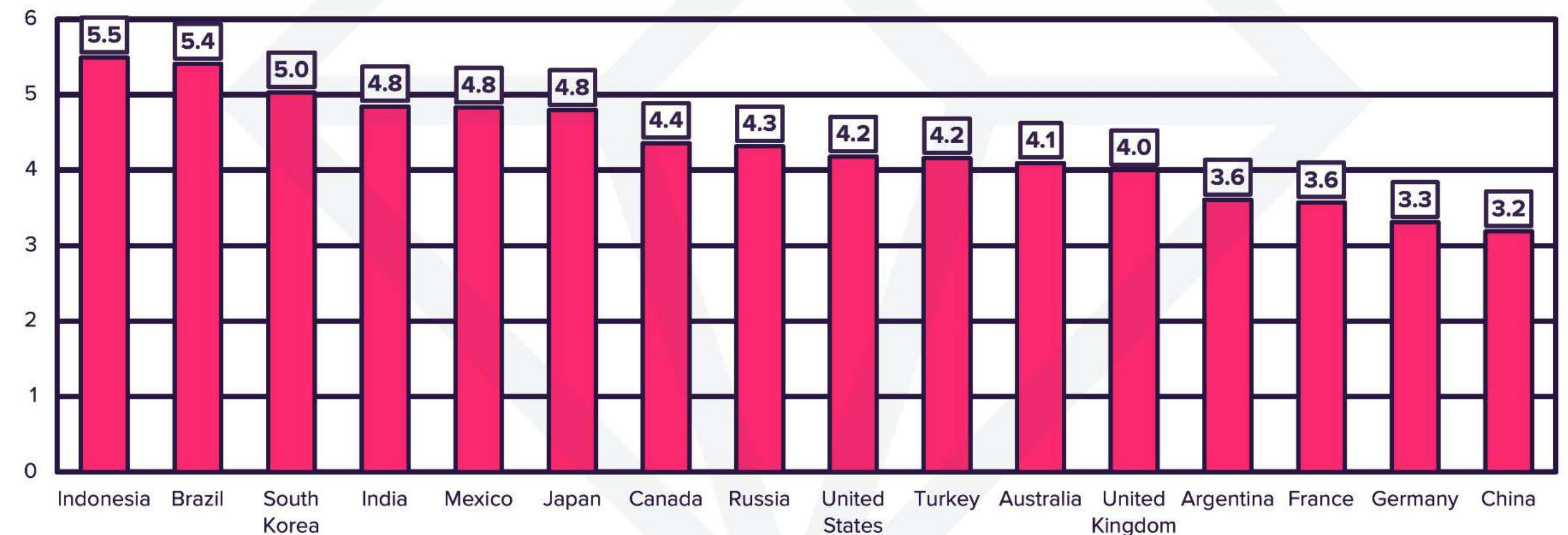*All estimates from App Annie Intelligence.*

In Q3 2021, 4.8 Average Daily Hours Spent in Apps During in India

- Daily time spent passed four hours in India for the first time in Q1 2020.

- India is the among the most mobile-first markets in the world with some of the highest daily time spent in apps.

Avg. Daily Hours Spent in Apps Q3 2021
Select Markets

Market	Avg. Daily Hours
Indonesia	5.5
Brazil	5.4
South Korea	5.0
India	4.8
Mexico	4.8
Japan	4.8
Canada	4.4
Russia	4.3
United States	4.2
Turkey	4.2
Australia	4.1
United Kingdom	4.0
Argentina	3.6
France	3.6
Germany	3.3
China	3.2

Source: App Annie Intelligence

Note: Android phones.
All estimates from App Annie Intelligence.

Gaming

Top Markets by Mobile Game Downloads
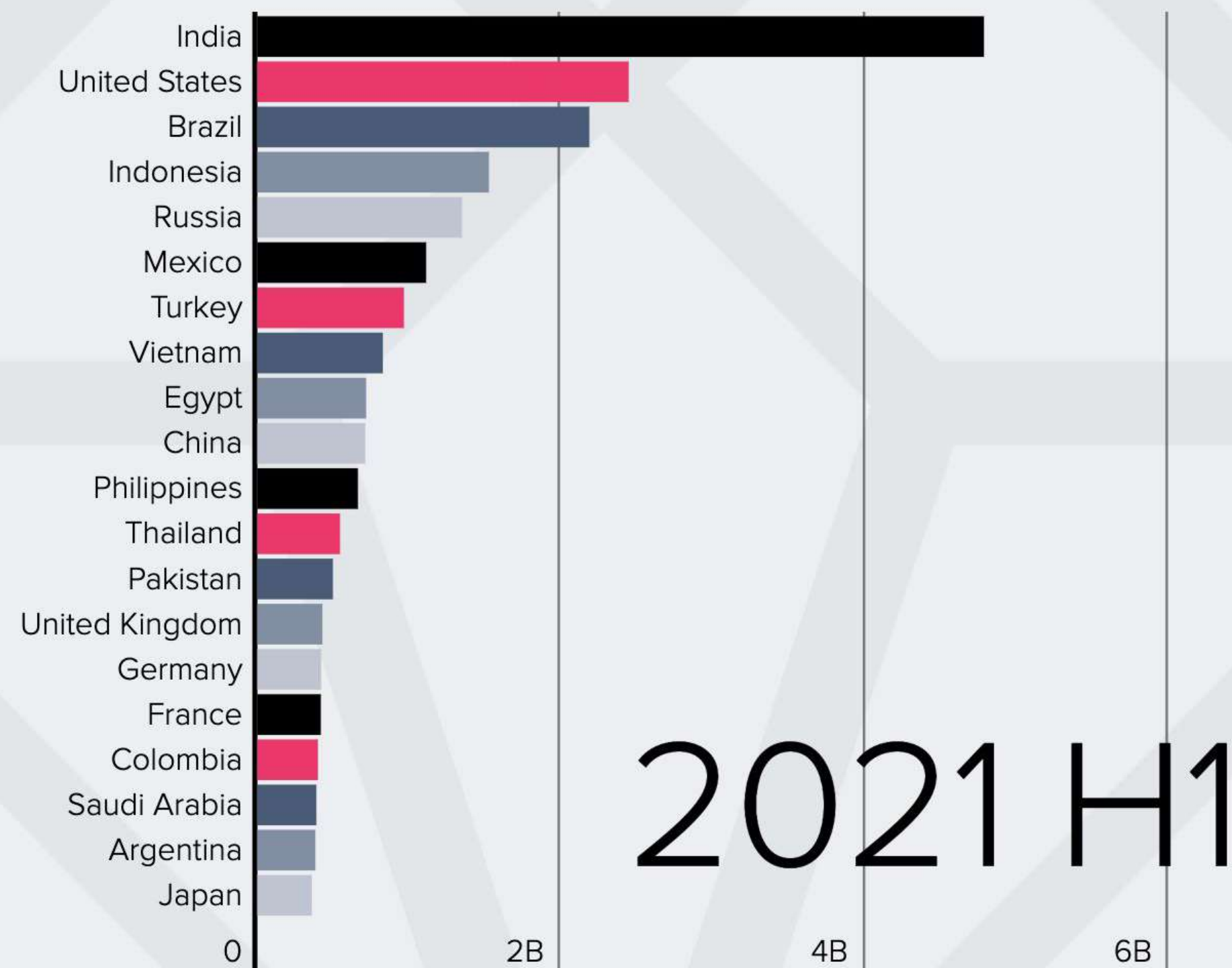
2021 H1

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

India was Largest Mobile Games Market for Downloads in H1 2021

- 4.8b games downloads in H1 2021
- Nearly 1 of every 5 global games downloads came from India

Ludo King was the Most Popular Game in India in H1 2021 by Downloads & Average MAU

DOWNLOADS

Rank	App Name	Subgenre
1	Ludo King	Board Game(Tabletop)
2	FAU-G: Fearless and United Guards	Other Action(Action)
3	Carrom Pool	Board Game(Tabletop)
4	Join Clash 3D	Action(Hypercasual)
5	Bubble Shooter by Ilyon	Bubble Shooter(Match)
6	Subway Princess Runner	Runner(Action)
7	Temple Run	Runner(Action)
8	Free Fire	Battle Royale(Shooting)
9	Candy Crush Saga	M3-Saga(Match)
10	Hill Climb Racing	Arcade Racing(Racing)

CONSUMER SPEND

App Name	Subgenre
Free Fire	Battle Royale(Shooting)
Call of Duty: Mobile	Team Deathmatch(Shooting)
Coin Master	Luck Battle(Party)
Teen Patti	Poker & Card(Casino)
Candy Crush Saga	M3-Saga(Match)
Lords Mobile	4X March-Battle(Strategy)
Clash of Clans	Build-Battle(Strategy)
Gardenscapes - New Acres	M3-Meta(Match)
8 Ball Pool	Simulation Sports(Sports)
eFootball PES 2020	Simulation Sports(Sports)

ACTIVE USERS

App Name	Subgenre
Ludo King	Board Game(Tabletop)
PUBG MOBILE	Battle Royale(Shooting)
Free Fire	Battle Royale(Shooting)
Candy Crush Saga	M3-Saga(Match)
Carrom Pool	Board Game(Tabletop)
Subway Surfers	Runner(Action)
Bubble Shooter by Ilyon	Bubble Shooter(Match)
Callbreak Multiplayer	Poker & Card(Casino)
Subway Princess Runner	Runner(Action)
Hill Climb Racing	Arcade Racing(Racing)

Battle Royale games also rank among the most downloaded, top grossing
and the most monthly active users with Free Fire (#8 by downloads,
#1 by spend, #3 by MAU) among notable titles.

The Top 1000 Downloaded Games Came from a Variety of Markets & Only 7.6% of Downloads from Homegrown Publishers

- As the largest market for game downloads, this is a major opportunity for homegrown publishers to tailor to the local market.

Share of Downloads by Location of Company HQ
Among Top 1000 Games in Select Markets in H1 2021

Legend:
- China
- United States
- Japan
- France
- South Korea
- Russia
- Israel
- Vietnam
- Turkey
- India
- Others

X-axis: HQ Share (20%, 40%, 60%, 80%, 100%)
Y-axis (Market): China, Japan, South Korea, India, Indonesia, Thailand, Vietnam, Australia
Regions: AMER, EMEAR, APAC
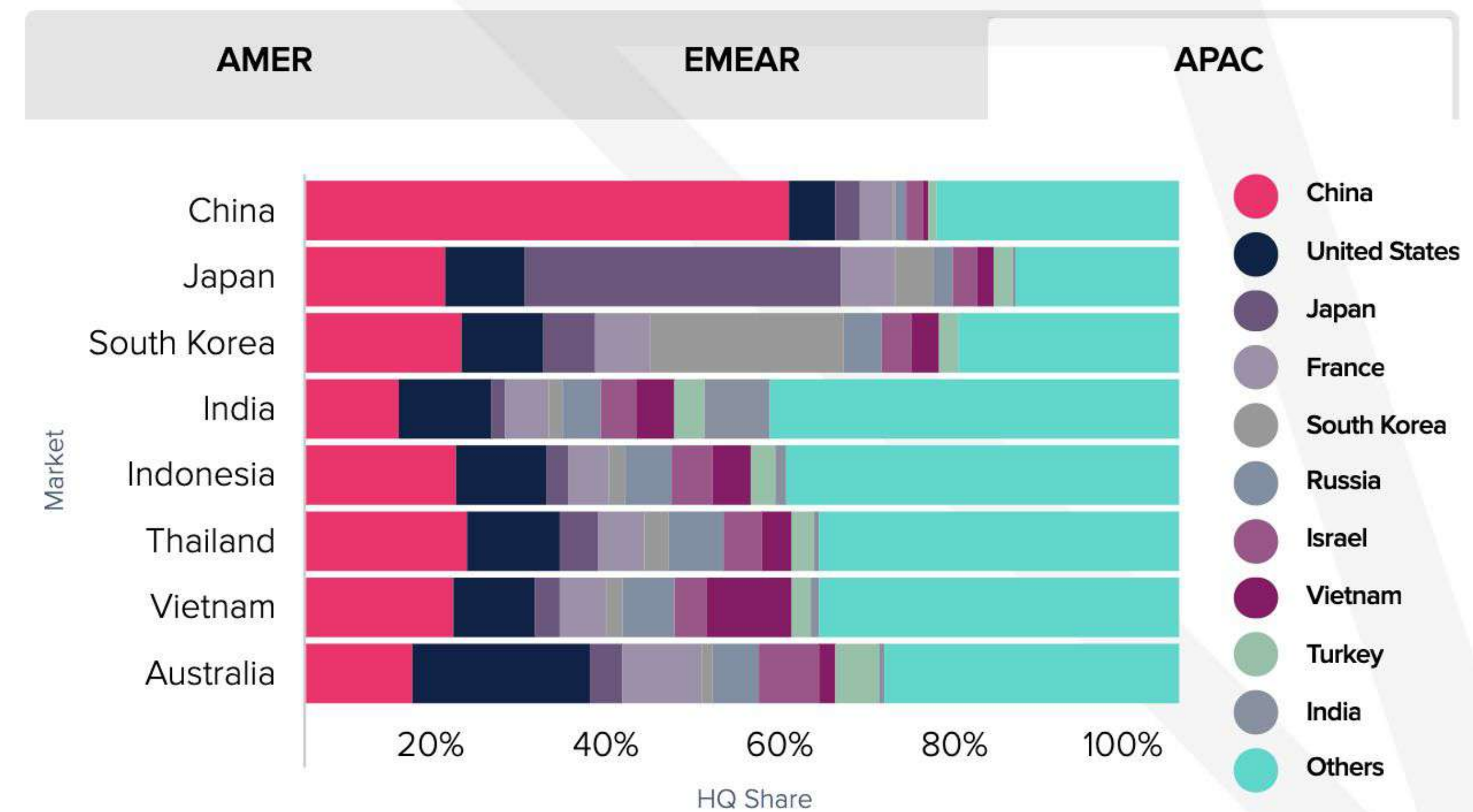
In Q3 2021, Genshin Impact Broke into Top 10 Games in India by Consumer Spend, up 17 Ranks from Q2 2021

	DOWNLOADS	vs. Q2 2021		CONSUMER SPEND	vs. Q2 2021		MONTHLY ACTIVE USERS	vs. Q2 2021
1	Ludo King	-		Free Fire	-		Ludo King	-
2	PUBG MOBILE	New!		PUBG MOBILE	New!		PUBG MOBILE	-
3	Carrom Pool	-		Coin Master	+1		Free Fire	-
4	Free Fire	+6		Call of Duty: Mobile	-2		Candy Crush Saga	-
5	Bridge Race	-1		Genshin Impact	+17		Carrom Pool	-
6	Hill Climb Racing	+6		Candy Crush Saga	-3		Subway Surfers	-
7	Subway Princess Runner	+2		Top War: Battle Game	+4		Bubble Shooter by Ilyon	-
8	Candy Crush Saga	-		Lords Mobile	-		Callbreak Multiplayer	+1
9	Subway Surfers	+5		Evony	+3		Subway Princess Runner	-1
10	Bubble Shooter by Ilyon	-5		Teen Patti	-5		Hill Climb Racing	-

Battlegrounds Mobile India was another breakout game of the quarter,
a testament to the popularity of of the battle royale genre.

Number of Games with Hybrid Ad Monetization Among Top 1000 Grossing Games in Select Markets
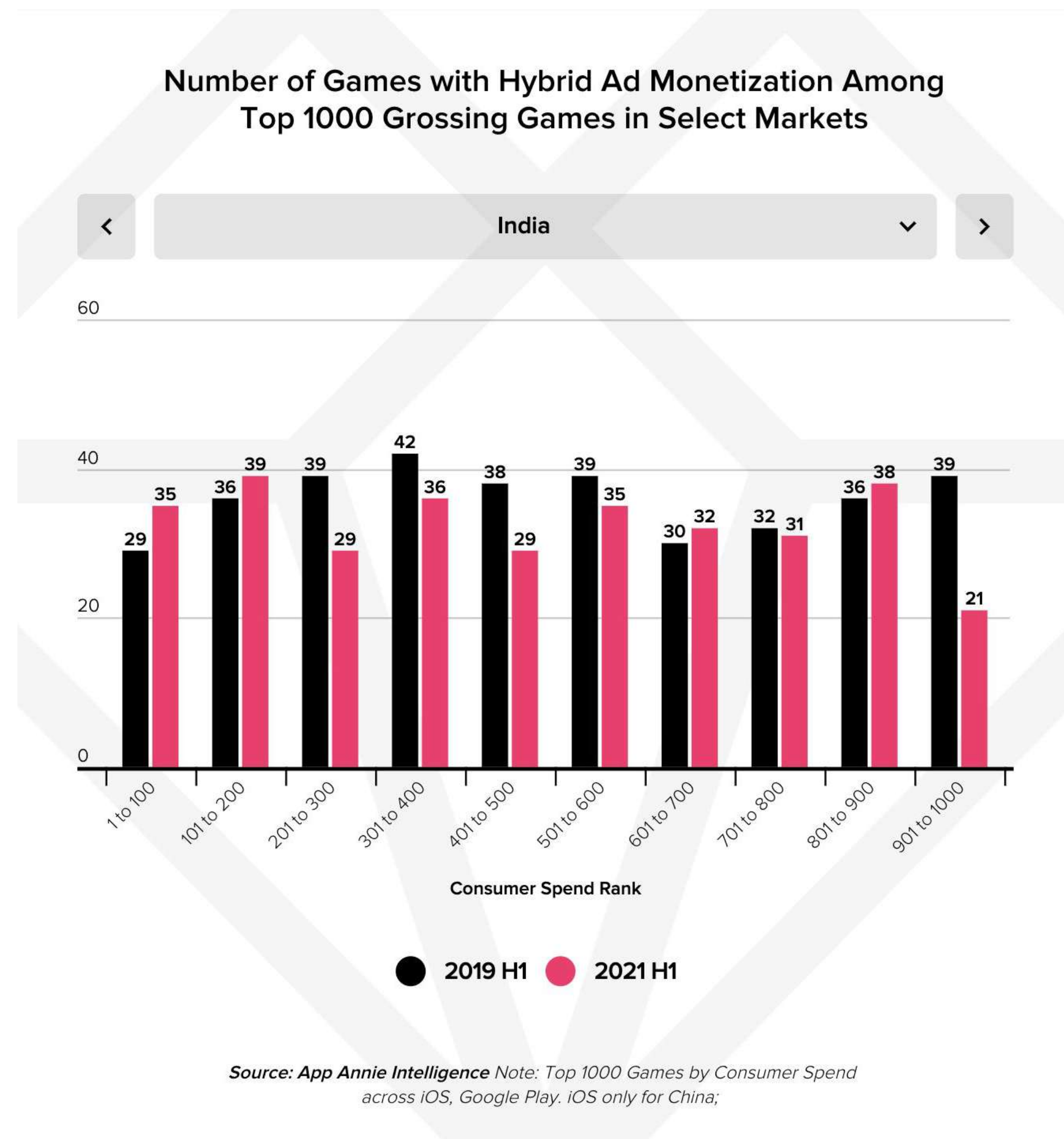
15% More of Top 200 Grossing Games Incorporated In-App Advertising into Monetization Model Alongside In-App Purchases

Source: App Annie Intelligence Note: Top 1000 Games by Consumer Spend across iOS, Google Play. iOS only for China;

Finance

Year-Over-Year Growth in Hours Spent
in Top Investment & Trading Apps
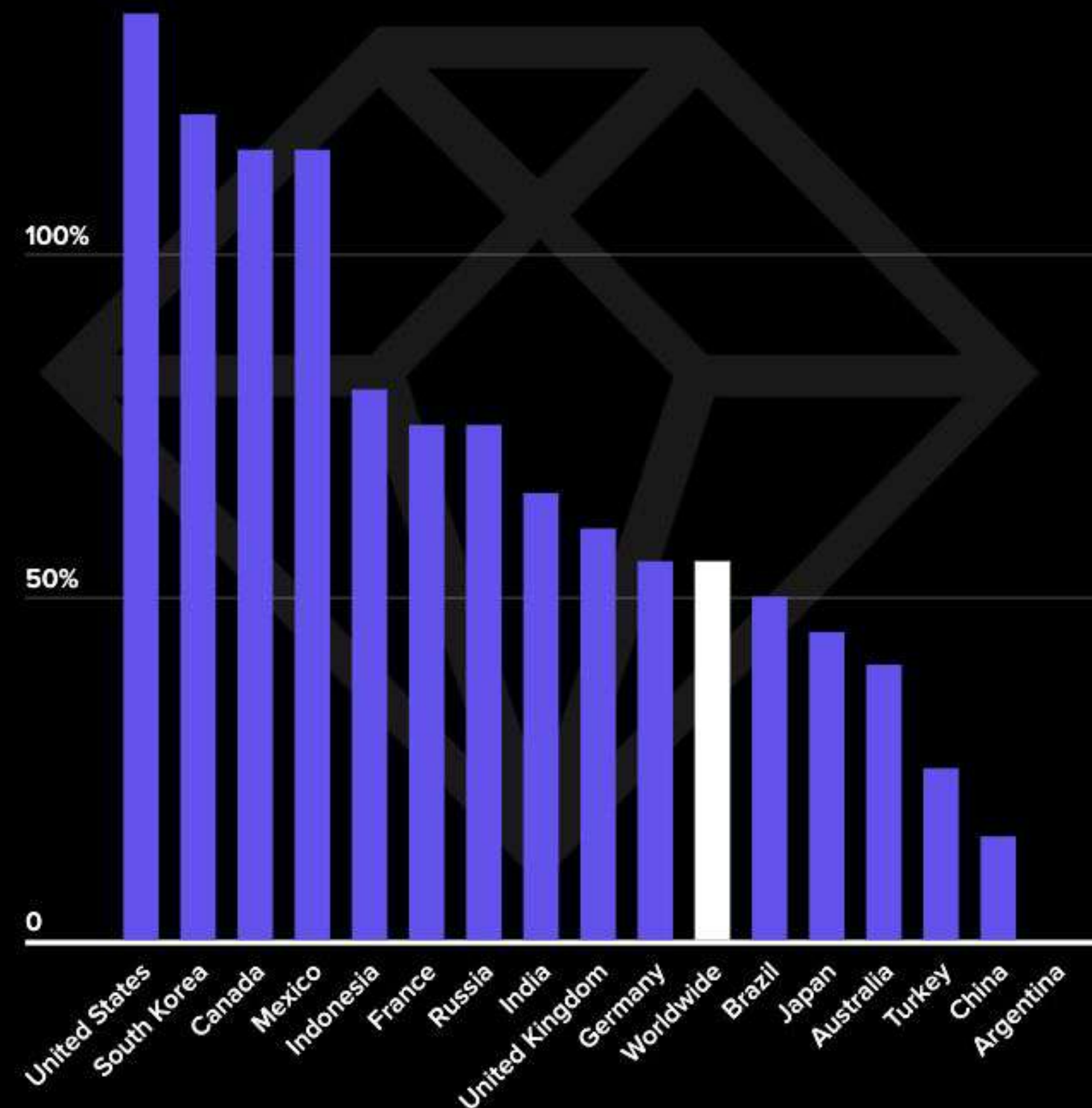
Source: App Annie Intelligence
Note: Android phones; Among top 5 apps

65% YoY Growth in Hours Spent in 2020 in Top 5 Investment & Trading Apps in India

- Above the Global Average of 55% with Significant Headroom for Growth

5.4x Average Sessions per User in Fintech than Banking Apps in India in 2020

Country	Finance-Fintech multiplier
South Korea	8.9x
China	10.8x
Turkey	4.4x
Indonesia	3.2x
India	5.4x
United Kingdom	3.0x
Canada	3.2x
France	2.3x
Germany	2.1x
Japan	4.7x
Australia	1.1x
Russia	1.6x
United States	2.1x
Argentina	1.5x
Brazil	0.7x
Mexico	0.6x

Finance-Fintech   Finance-Banking
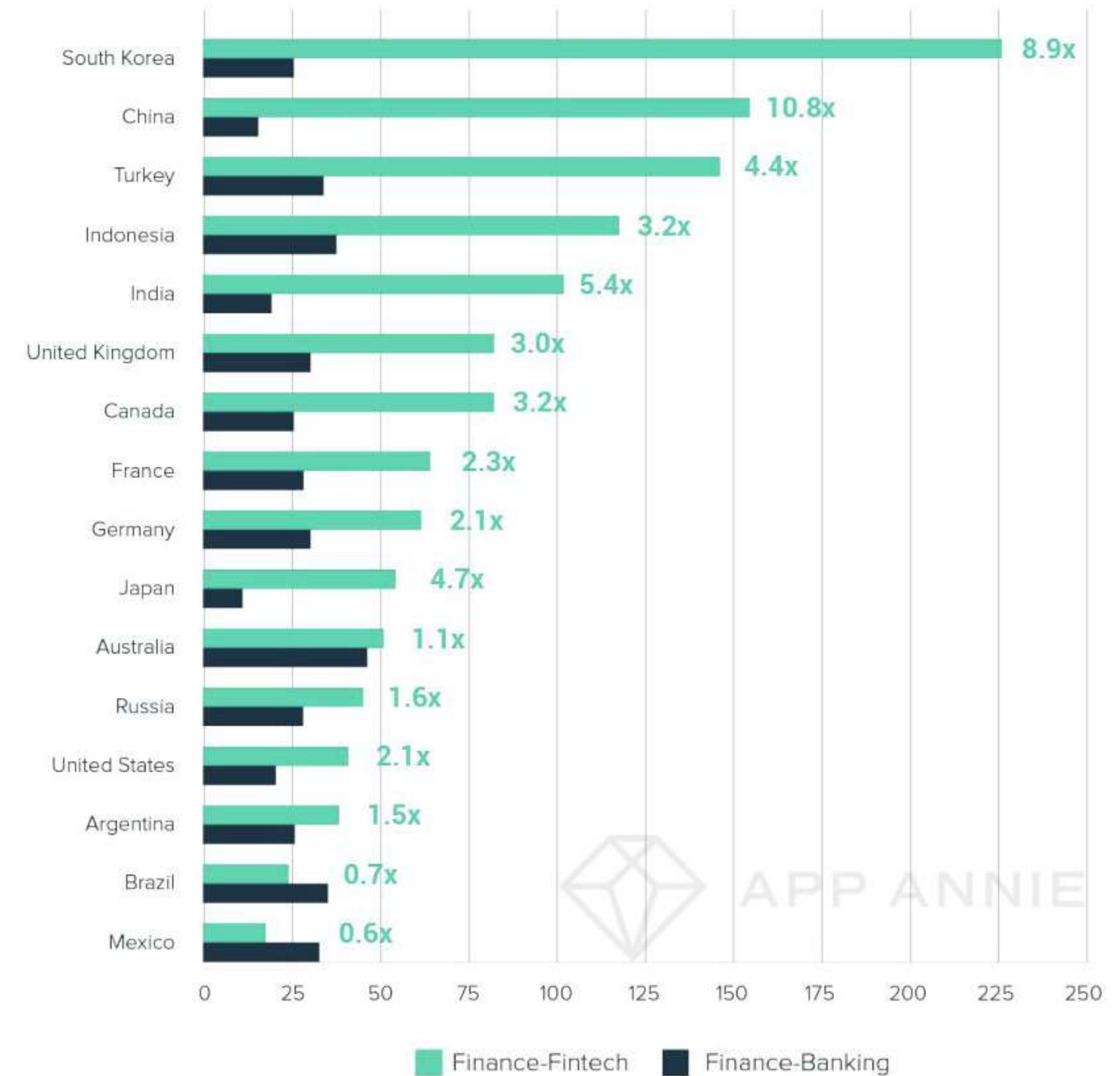
#LevelUp

India Top 10 Breakout Finance Apps by Downloads

RANK	APP		PARENT COMPANY	HQ COUNTRY
1		Upstox Pro	RKSV	India
2		WazirX	Zanmai Labs	India
3		CoinSwitch	CoinSwitch	India
4		CoinDCX Investment	CoinDCX Official	India
5		Dhani	Indiabulls Ventures	India
6		CRED	Dreamplug	India
7		Webull Stocks	Webull	United States
8		Groww - Mutual Funds App	Nextbillion Technology	India
9		Binomo	Binomo	St. Vincent and The Grenadines
10		MobiKwik	One Mobikwik Systems	India

Note: iOS and Google Play Combined; Quarter-over-Quarter growth in downloads
Rankings are based on App Annie Intelligence estimates as of July 16, 2021

Upstox Pro, WazirX & CoinSwitch Saw the Greatest Growth in Downloads Among Finance Apps

India Q2 2021

Unified Payments Interface (UPI) is Seeing Strong Growth in India Propelled by Merchant Utility Apps Whilst Credit Card Penetration Remains ~5%

- Among select Merchant Utility apps, total downloads in India saw a 48% increase YoY in Q2 2021 to surpass 124 Million, whilst the volume of UPI transactions reached nearly 8 Billion in Q2 2021 alone, more than 2x the volume in Q2 2020

Cumulative Downloads of Select Merchant Utility Apps vs Quarterly Volume of UPI Transactions
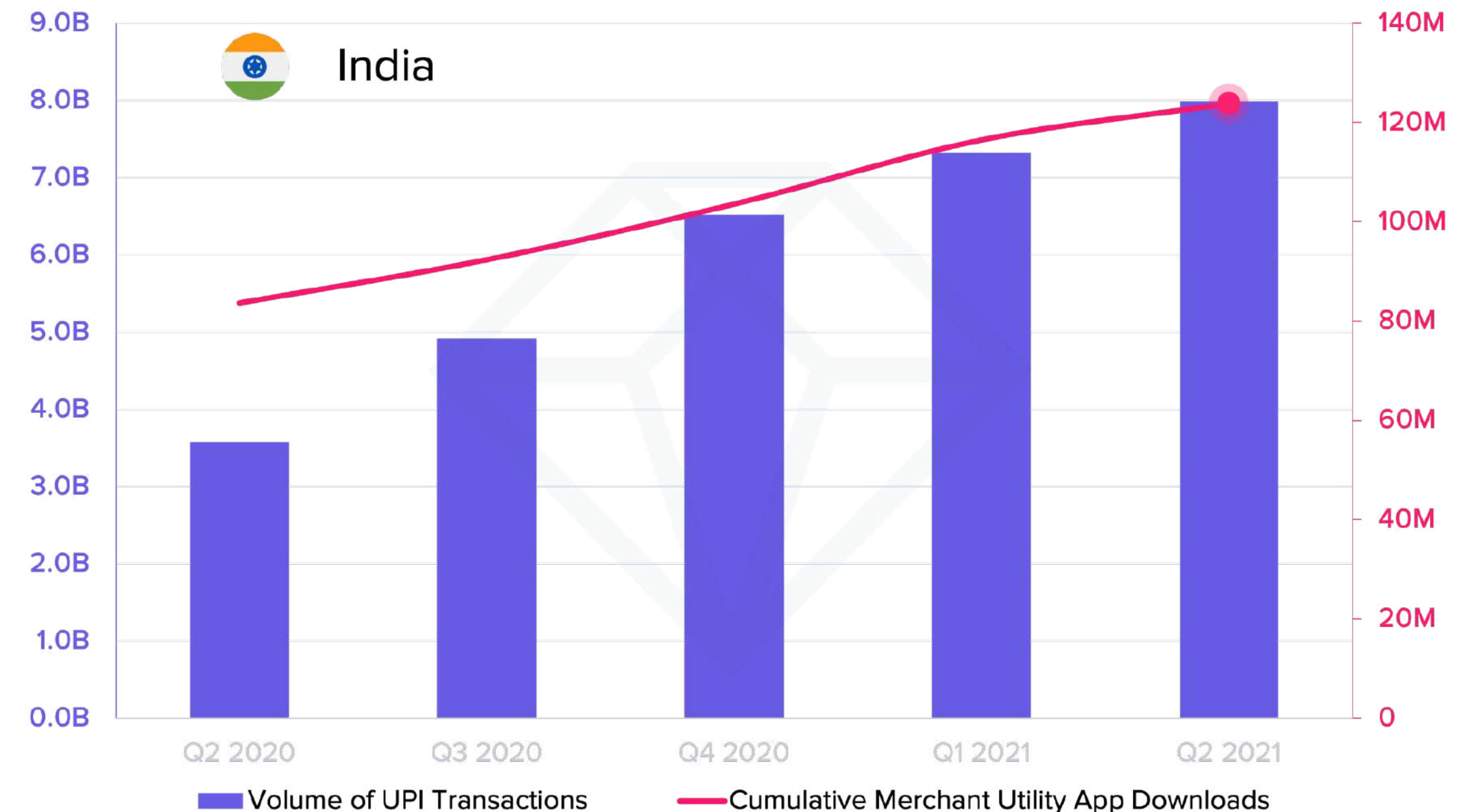
India

Legend:
- Volume of UPI Transactions
- Cumulative Merchant Utility App Downloads

Source: App Annie Intelligence

iOS and Google Play downloads in India, January 2020 – June 2021
Volume of UPI Transactions from the National Payments Corporation of India (NPCI)
Select Merchant Utility apps include Khata Book Udhar Bahi Khata, OkCredit, Paytm for Business, BharatPe for Merchants, Mswipe, and Open Money

Khata Book Leads Among Merchant Utility And Accounting Apps in India by Average Monthly Active Users in Q2 2021

Quarterly Active User Volume of Select Merchant Utility Apps, Q2 2020 vs Q2 2021

🇮🇳 India

	BharatPe	Khata Book	OkCredit	Paytm For Business
Q2 2020	3M	14M	9M	8M
Q2 2021	5M	14M	8M	8M
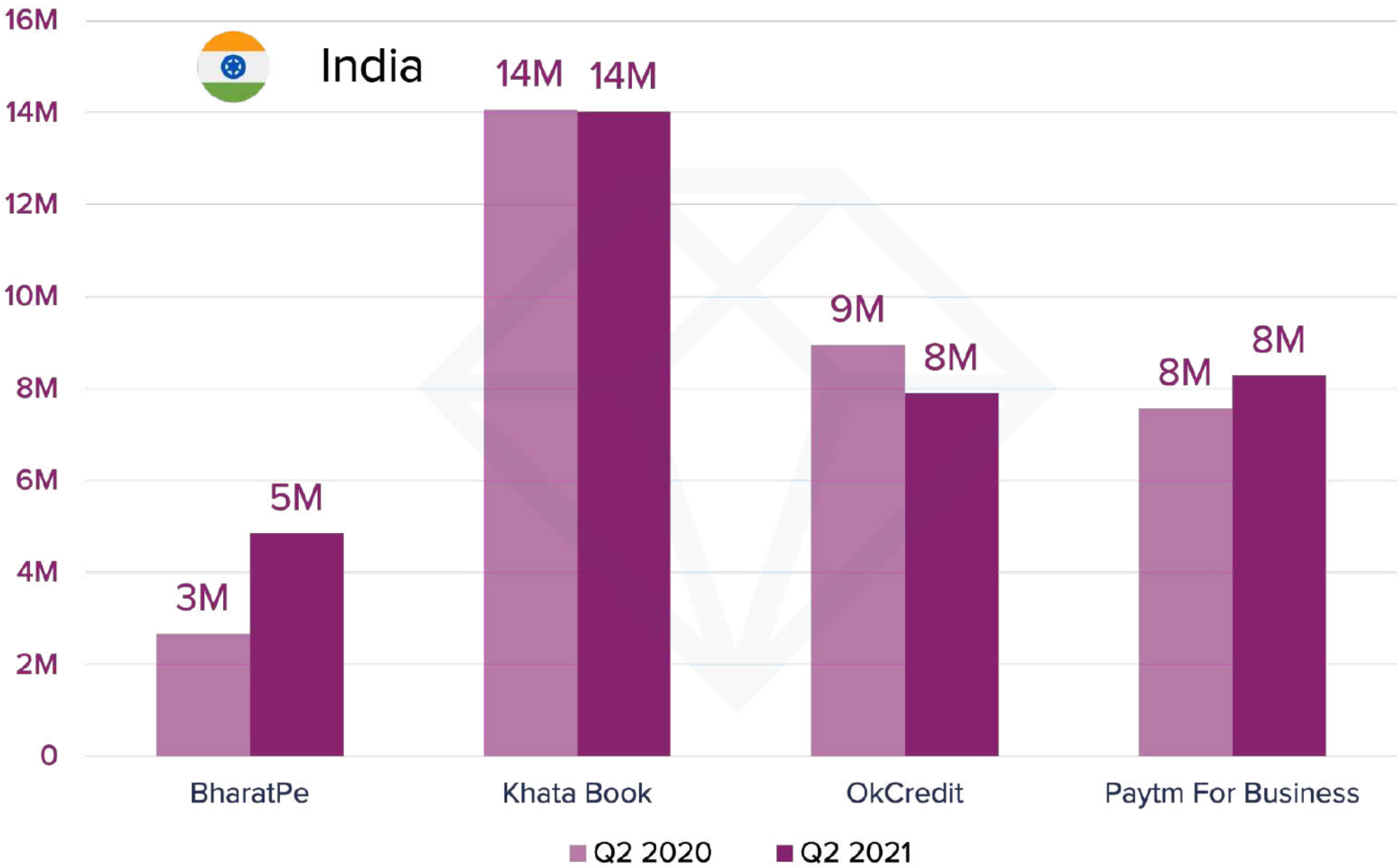
■ Q2 2020 ■ Q2 2021

Source: App Annie Intelligence

iOS and Google Play downloads in India

Select Merchant Utility Apps
(Cumulative Downloads from Q2 2020 – Q2 2021)

Khata Book	BharatPe	Paytm for Business	OkCredit	Mswipe	Open Money
(+20M YoY)	(+8M YoY)	(+7M YoY)	(+5M YoY)	(+23K YoY)	(+11K YoY)

Dhani Saw Tremendous Growth to Become the Most Popular Buy Now Pay Later (BNPL) App by Cumulative Downloads in India Since Q3 2020
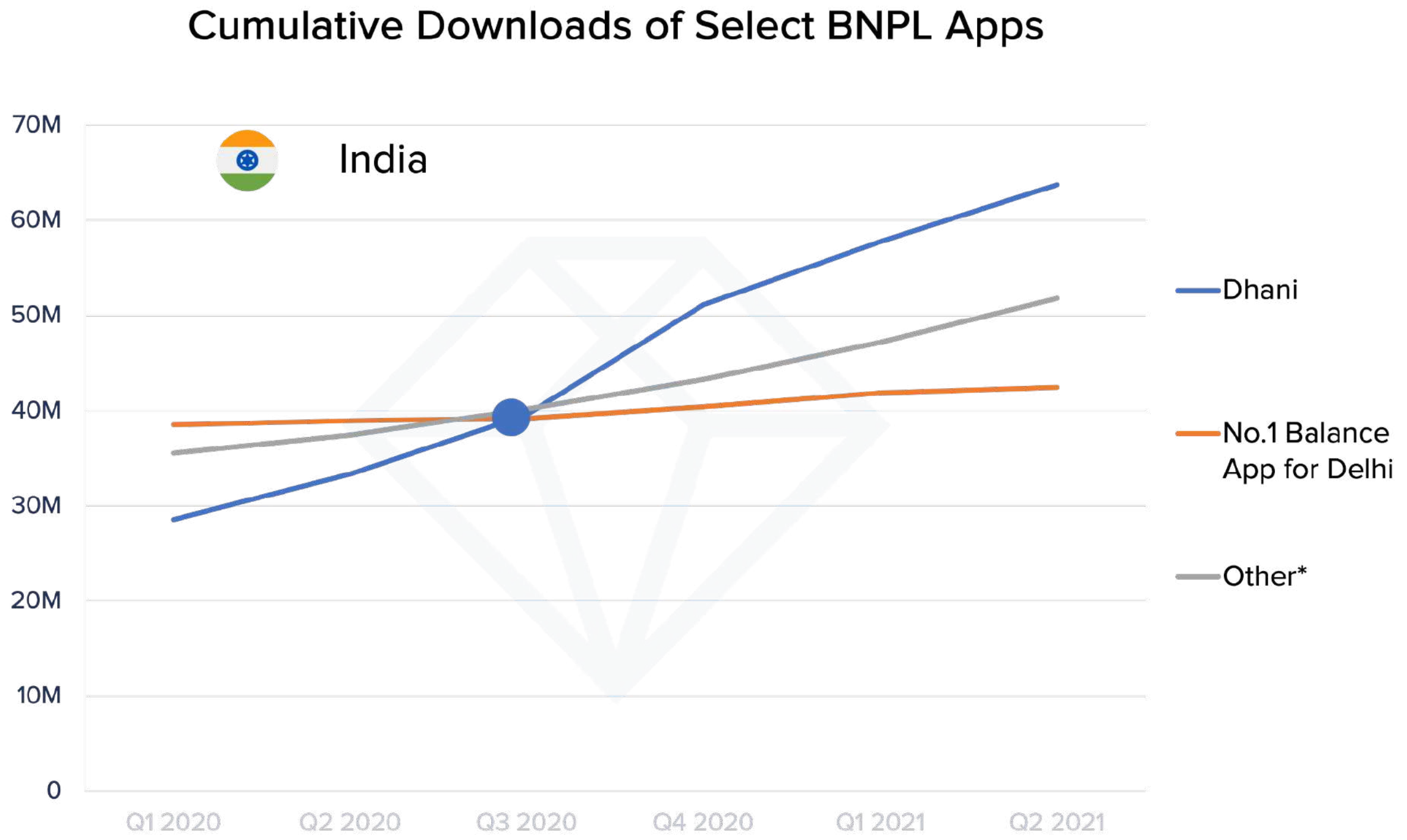
Cumulative Downloads of Select BNPL Apps

India

Dhani

No.1 Balance App for Delhi

Other*

Source: App Annie Intelligence

iOS and Google Play downloads in India, January 2020 – June 2021
Other select BNPL apps include Bullet, EarlySalary, Kissht, Money View, Navi, Personal Loan, Slice Super Card, and StashFin

StashFin's Active User Base Grew 64% Quarter over Quarter in Q2 2021, Showing Strong Potential in the Buy Now Pay Later Market in India

Percent Change in Average Active Users of Select BNPL Apps
Q2 2020 vs Q2 2021

Volume Change

App	% Change	Volume Change
StashFin	64%	+231K
Dhani	24%	+2.2M
Kissht	14%	+267K
Slice Super Card	14%	+81K
Navi	12%	+97K
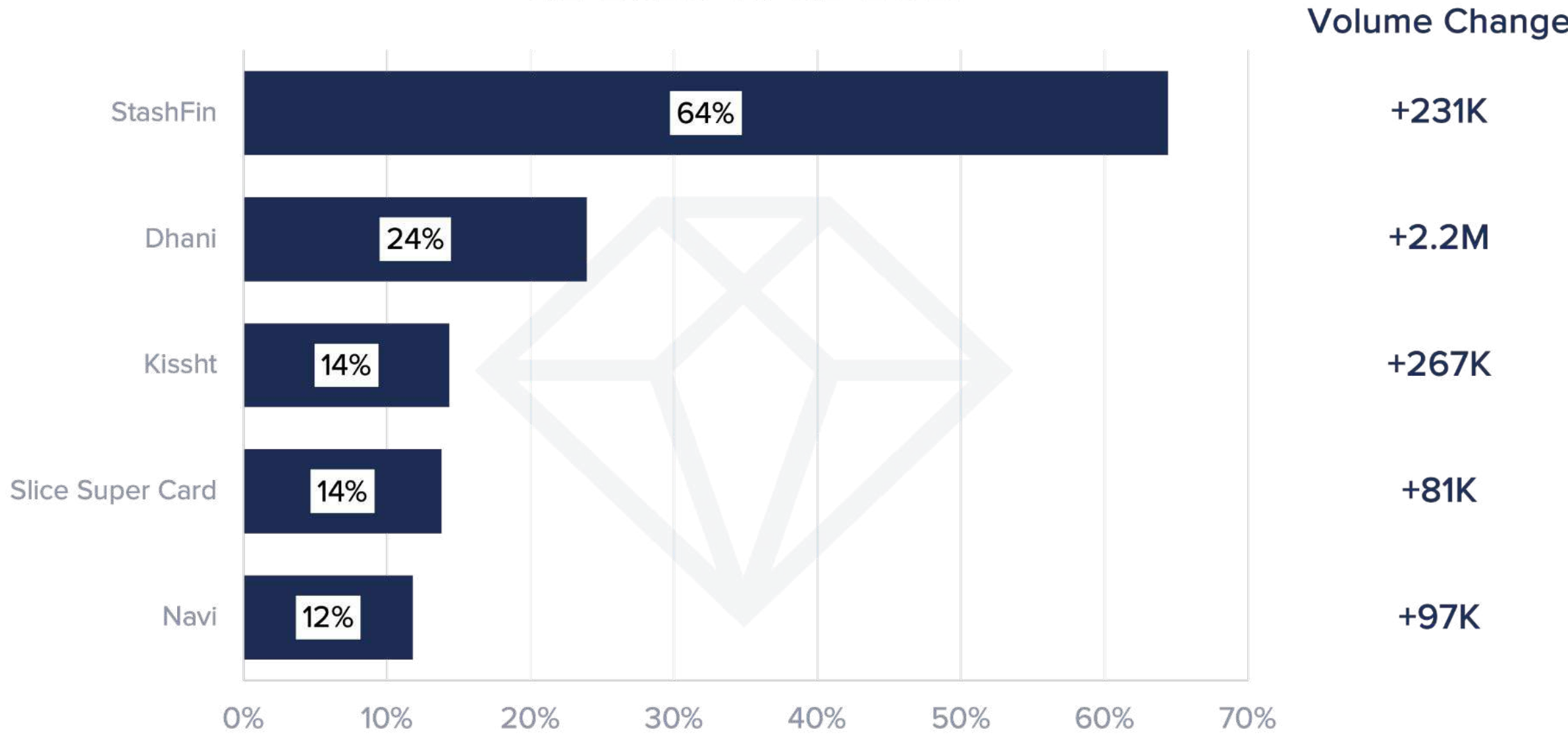
Source: App Annie Intelligence

Note: Android and iOS phones in India; Year-over-Year aggregate growth from Q2 2020 to Q2 2021

Cumulative Downloads vs Average M1 Retention Rates of Select Crypto Trading Apps, Q2 2021

India — Cumulative Downloads ● M1 Retention Rate
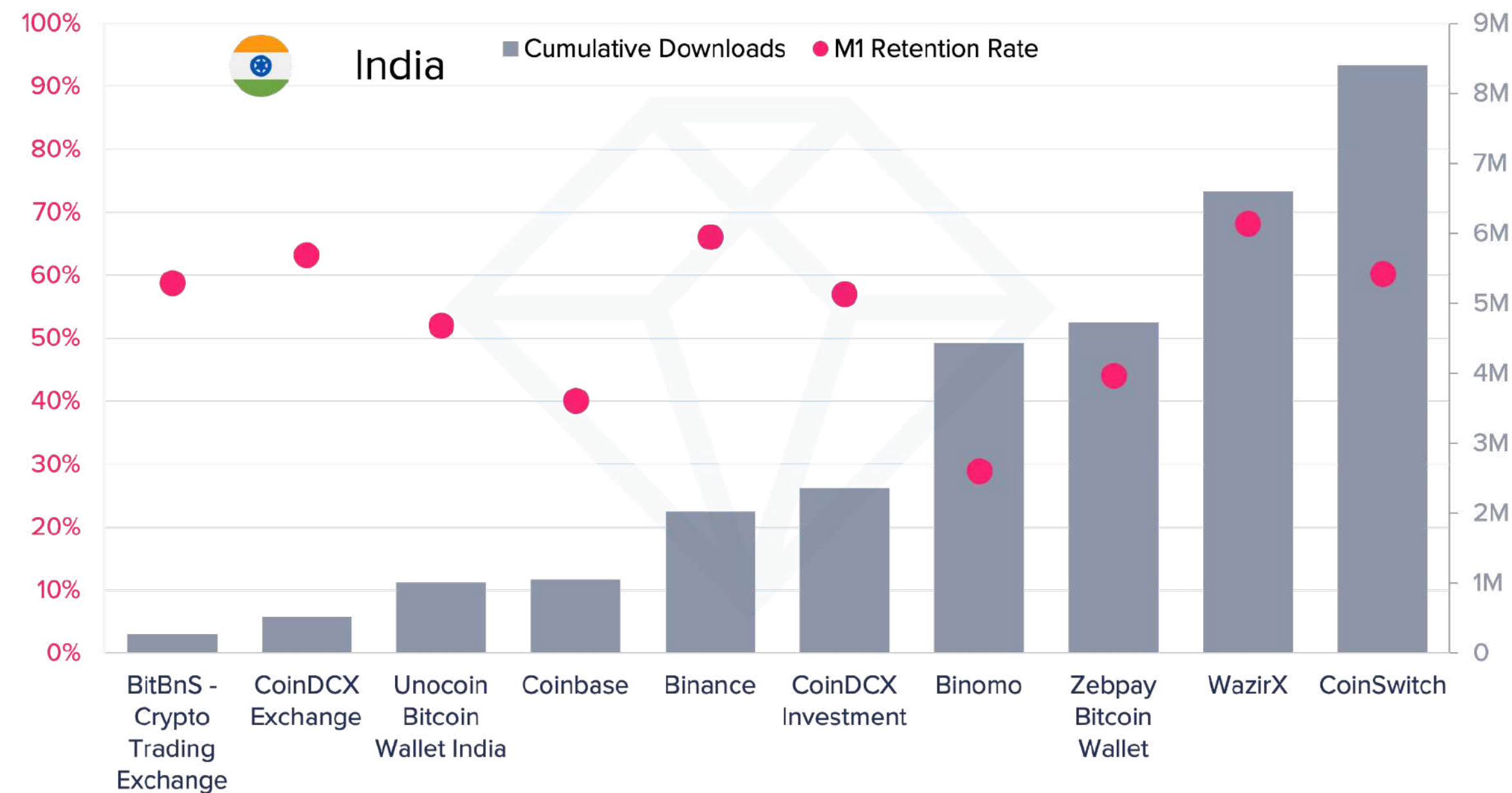
Source: App Annie Intelligence

Google Play and iOS in India, Q2 2021

Most Crypto Trading Apps Have Healthy One-Month Retention Rates Among Users in India

● Unified Payments Interface (UPI) is also used to assist in fund transfers between trading accounts and banks

Social Networking & Video Streaming

The Evolution of Social & Entertainment Apps Over Time in India by Total Time Spent

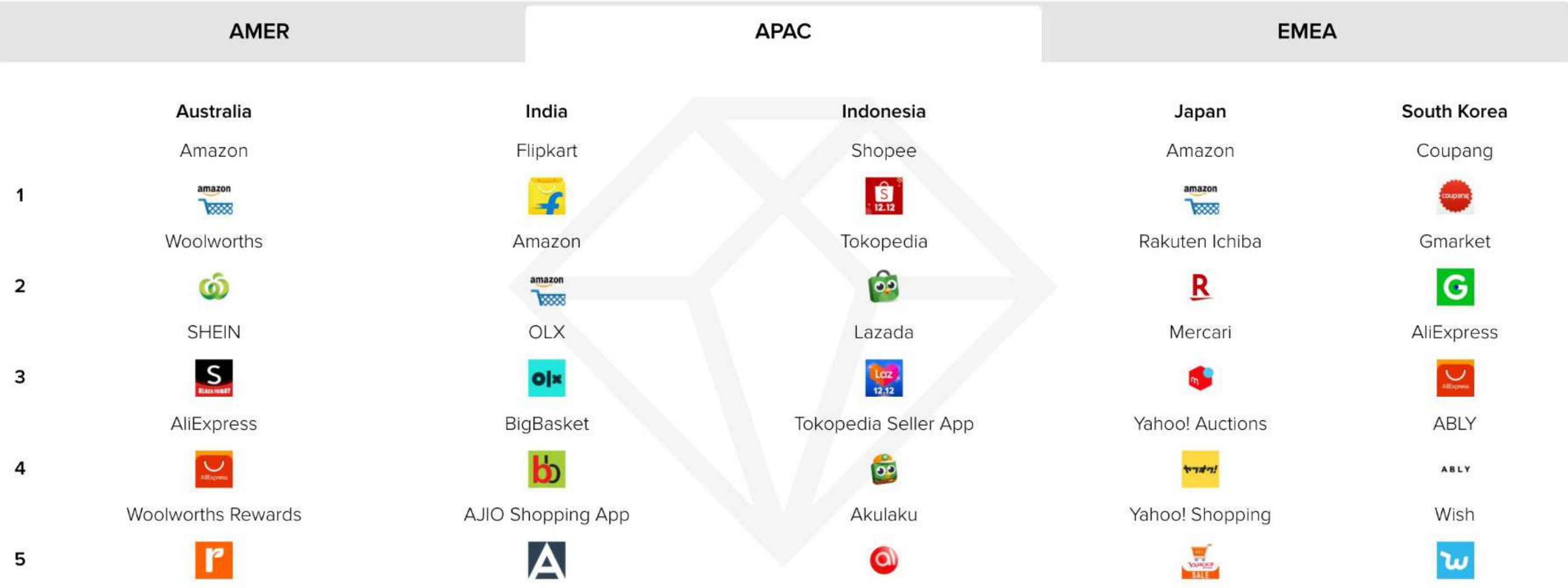|	2013	2014	2015	2016	2017	2018	2019	2020	2021 H1
1	WhatsApp Messenger	WhatsApp Messenger	WhatsApp Messenger	WhatsApp Messenger	WhatsApp Messenger	YouTube	YouTube	YouTube	YouTube
2	Facebook	Facebook	Facebook	Facebook	YouTube	WhatsApp Messenger	WhatsApp Messenger	WhatsApp Messenger	WhatsApp Messenger
3	MX Player	MX Player	YouTube	YouTube	Facebook	Facebook	Facebook	Facebook	Facebook
4	YouTube	YouTube	MX Player	MX Player	Instagram	Instagram	Instagram	Instagram	Instagram
5	Facebook Messenger	Viber	Hike Sticker Chat	Instagram	MX Player	MX Player	MX Player	MX Player	Truecaller
6	Viber	Hike Sticker Chat	Instagram	Hike Sticker Chat	Hotstar	Truecaller	Truecaller	Truecaller	MX Player
7	WeChat	Instagram	Facebook Messenger	Facebook Messenger	Jio4GVoice	Facebook Messenger	Hotstar	TikTok	Hotstar
8	Hangouts	Truecaller	Twitter	Hotstar	Facebook Messenger	Hotstar	TikTok	Hotstar	WhatsApp Business
9	Truecaller	Facebook Messenger	Truecaller	Twitter	Hike Sticker Chat	JioTV	Facebook Messenger	Snack Video	Facebook Messenger
10	Twitter	Twitter	Motorola Gallery	VLC Media Player	JioTV	Jio4GVoice	WhatsApp Business	Facebook Messenger	Telegram

In H1 2021, Telegram Broke into the Top 10

In 2020, MX Player, Netflix & Amazon Prime Video Saw the Greatest Growth in Time Spent for Video Streaming Apps in India

Breakout Apps

2020 Shopping: Time Spent

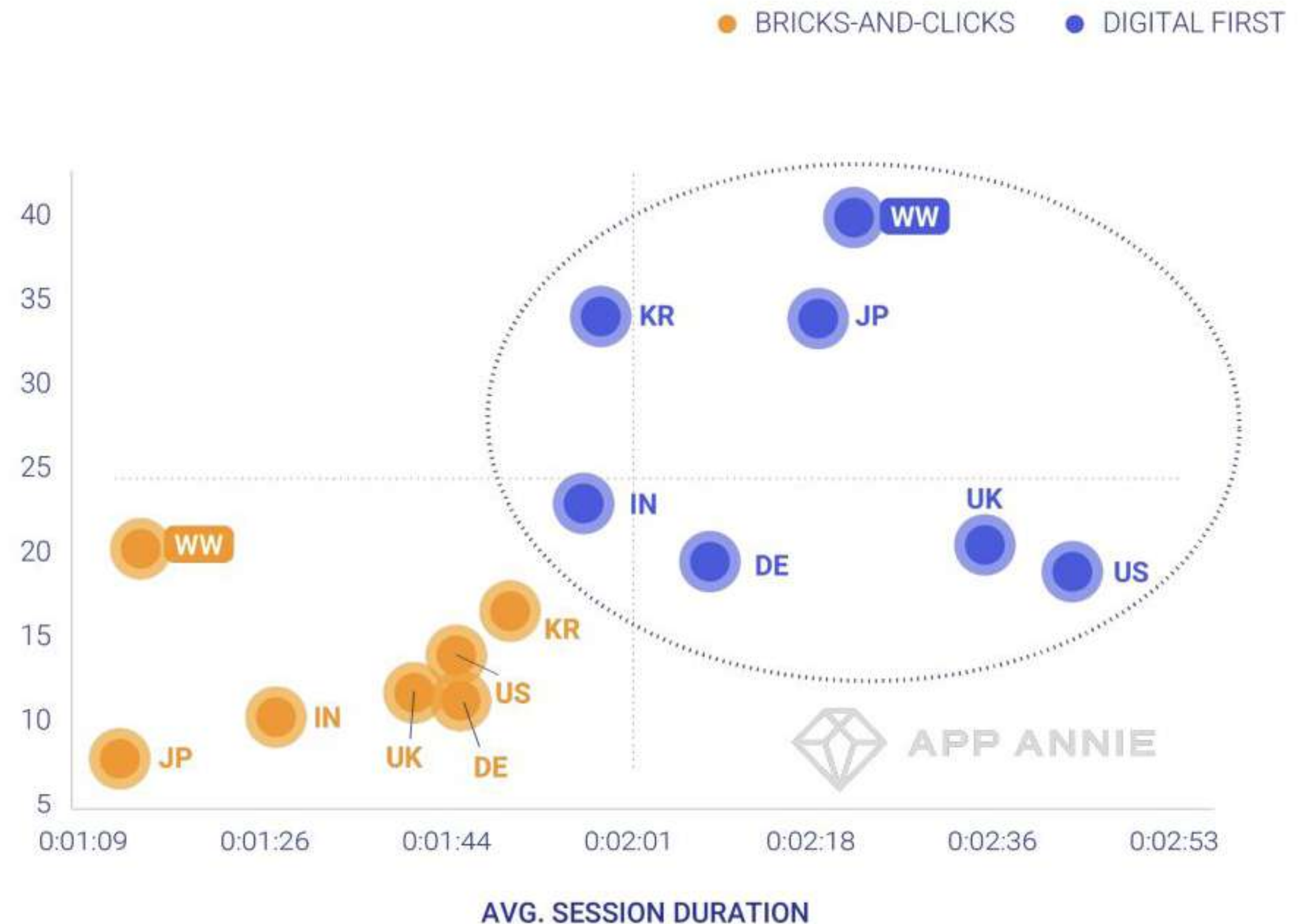|	AMER		APAC			EMEA	
	Australia		India	Indonesia		Japan	South Korea
1	Amazon		Flipkart	Shopee		Amazon	Coupang
2	Woolworths		Amazon	Tokopedia		Rakuten Ichiba	Gmarket
3	SHEIN		OLX	Lazada		Mercari	AliExpress
4	AliExpress		BigBasket	Tokopedia Seller App		Yahoo! Auctions	ABLY
5	Woolworths Rewards		AJIO Shopping App	Akulaku		Yahoo! Shopping	Wish

Shopping & Food

In Q1 2021 in India, Digital-First Shopping Apps Saw 23 Avg Sessions Per User Each Month Compared to 10 in Bricks-And-Clicks Shopping Apps

Legend: ● BRICKS-AND-CLICKS   ● DIGITAL FIRST

X-axis: AVG. SESSION DURATION

Food Delivery & QSR Apps Dominate
Top Food and Drink Apps by Downloads

AUSTRALIA

1	UberEATS	Uber Technologies	Food-Delivery
2	Menulog-Order Takeaway Online	Just Eat Takeaway	Food-Delivery
3	DoorDash	DoorDash	Food-Delivery
4	mymacca's Ordering & Offers	McDonald's	QSR
5	KFC Australia: Order On The Go	Yum! Brands	QSR
6	Domino's Pizza AU and NZ	Domino's Pizza	QSR
7	Hungry Jacks Shake Win App	Hungry Jack's	QSR
8	Dan Murphy's	Woolworths	Retail-Brick
9	Deliveroo	Deliveroo	Food-Delivery
10	HelloFresh	HelloFresh	Food-Delivery

HONG KONG

1	McDonald's Hong Kong	McDonald's China	QSR
2	foodpanda	Delivery Hero	Food-Delivery
3	Deliveroo	Deliveroo	Food-Delivery
4	大家樂	Cafe de Coral	QSR
5	UberEATS	Uber Technologies	Food-Delivery
6	OpenRice	Openrice	Food-Delivery
7	Eatizen	Maxim's Caterers	Restaurant-Coupons
8	Storellet	Storellet	Restaurant-Rewards
9	KFC HK	Birdland	QSR
10	香港壽司郎	Akindo Sushiro	QSR

INDIA

1	Zomato	Zomato	Food-Delivery
2	Swiggy Food Delivery	Swiggy	Food-Delivery
3	Domino's Pizza India	Jubilant Foodworks	QSR
4	KFC India	Yum! Brands	QSR
5	McDonald's App	McDonald's	QSR
6	Pizza Hut UK Ordering App	Yum! Brands	QSR
7	Dineout: Reserve a Table	Times Group	Restaurant-Coupons
8	McDelivery- India West & South	McDonald's	QSR
9	Burger King India	BURGER KING INDIA LIMITED	QSR
10	Fresh To Home	Freshtohome	Grocery-Delivery

INDONESIA

1	McDonald's App	McDonald's	QSR
2	Pizza Hut Delivery Indonesia	PHD Indonesia	QSR
3	GrabMerchant	Grab	Business-Management
4	COOKPAD International	COOKPAD	Cooking-Recipes
5	McDelivery Indonesia	Rekso Nasional Food	QSR
6	Chatime Indonesia	Kawan Lama	QSR
7	Kopi Kenangan	Bumi Berkah Boga	QSR
8	Burger King Indonesia	PT Sari Burger Indonesia	QSR
9	Yummy	Media Putra Nusantara	Cooking-Recipes
10	HappyFresh	iCart	Grocery-Delivery

India | Q1 2021

Health & Fitness

H1 2021: Top 2 Grossing Health & Fitness Apps in India were Meditation Apps Calm & Headspace

RANK	🌐 WORLDWIDE	🇺🇸 UNITED STATES	🇨🇦 CANADA	🇮🇳 INDIA	🇧🇷 BRAZIL	🇬🇧 UNITED KINGDOM
1	Calm	Calm	Calm	Calm	Strava Running and Cycling	Courtney Black Fitness
2	MyFitnessPal	MyFitnessPal	MyFitnessPal	Headspace	Meditopia	Strava Running and Cycling
3	Headspace	Weight Watchers Mobile	Fitbit	cure.fit	Calm	MyFitnessPal
4	Strava Running and Cycling	Fitbit	Headspace	Yoga-Go: Train at Home	Flo Period & Ovulation Tracker	Calorie Counter by NutraTech
5	Fitbit	Peloton	Peloton	Flo Period & Ovulation Tracker	Headspace	Calm

Indicating Demand for Mindfulness and Mental Health

INDIA

Travel & Navigation

Top Travel & Navigation Apps by Average MAU

APAC | May - July 2021

#	CHINA	SOUTH KOREA	JAPAN	INDIA
1	Amap	Naver Map	Yahoo! Japan Transit	Where is my Train
2	Baidu Map	T map	Yahoo Map	Ola cabs
3	Tencent Maps	KakaoMap	Yahoo! Car Navi	IRCTC Rail Connect
4	Didi Chuxing	KakaoTaxi	Norikae Annai	Uber
5	易行天下	Kakao Navi	Google Earth	IRCTC Train Booking ixigo
6	Ctrip	KORAIL	NAVITIME Transit	RTO Vehicle Information
7	Hellobike	KakaoBus	楽天トラベル	MakeMyTrip
8	Qunar Travel	지하철 종결자	じゃらん	ConfirmTkt
9	Dida Chuxing	Yanolja	NAVITIME	OYO Rooms
10	车来了-最精准的实时公交	KakaoMetro	SUUMO スーモ	Google Earth
11	飞猪旅行	How About Here	Tokyo Disney Resort App	RTO Vehicle Information & Exam
12	智行火车票	고속버스모바일	Taxibell	Goibibo
13	滴滴专车	Intercitybus Mobile	Railway Route Search	m Indicator Mumbai
14	Lalamove	전국 스마트 버스	Booking.com	Rapido
15	铁路12306	SRT NEW	ANA	PNR Status & IRCTC Train info
16	掌上公交	Airbnb	Docomo map navi	redBus
17	同程旅游-一元景点门票抢先订	Subway Korea	JR東日本アプリ	NTES
18	Mafengwo Travel Guides	T map Taxi	Google Street View	Booking.com
19	Umetrip	Olleh Navi	Ekitan	JD Justdial
20	曹操出行	T money	JAL	what3words

Travel & Navigation Apps Began to See Waves of Recovery in 2021

INDIA

Marketing & Advertising

Top 10 Keywords by Search Volume

2021 Q1 for Android Phones in India

| | iPhone | | | | Android Devices | | | | | | |

	United States		United Kingdom		France		Germany		Spain		India	
Keyword Rank	Keyword	Max Search Volume	Keyword	Max Search Volume	Keyword	Max Search Volume	Keyword	Max Search Volume	Keyword	Max Search Volume	Keyword	Max Search Volume
1	instagram	100	vpn	100	snapchat	100	instagram	100	amazon	100	instagram	100
2	snapchat	99	snapchat	95	instagram	99	snapchat	96	google	100	whatsapp+	96
3	facebook	96	instagram	96	scanner gratuit	99	tinder	96	youtube	98	whatsapp	95
4	tik tok	92	tinder	92	facebook	92	whatsapp	95	game	97	snapchat	91
5	youtube	91	facebook	90	tinder	93	tik tok	92	facebook	97	facebook	90
6	tinder	91	tiktok	90	whatsapp	92	qr code scanner	97	games	96	youtube	90
7	roblox	90	free vpn	94	messenger	91	youtube	91	instagram	96	vpn ·	91
8	messenger	90	whatsapp	87	tik tok	90	scanner app	95	sports	94	vpn	92
9	among us	93	roblox	88	vpn	94	facebook	90	el corte inglés	93	google pay	89
10	whatsapp	89	among us	88	youtube	91	zoom	91	corte inglés	93	free fire	89

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Comprehensive Data to Act on

Connect first and third-party data to know how you are performing against competitors across downloads, usage, monetization, and beyond.

Trusted Source of Insights

App Annie Intelligence is cited in IPOs, earnings reports, as well as by leading media and analysts. Over 1,100 companies rely on App Annie data to win in mobile.

Cloud Solution With Global Reach

We have teams in 12 offices to deliver the global service and support customers need.

Thank You

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