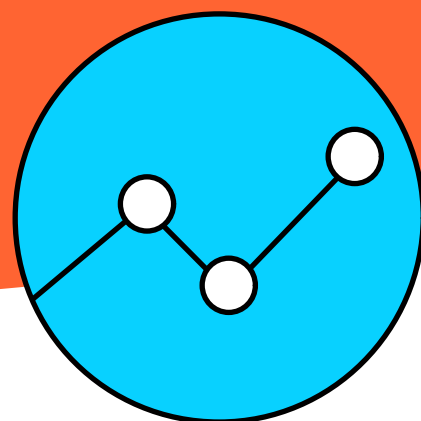


Mobile App Trends 2021:

# A focus on APAC

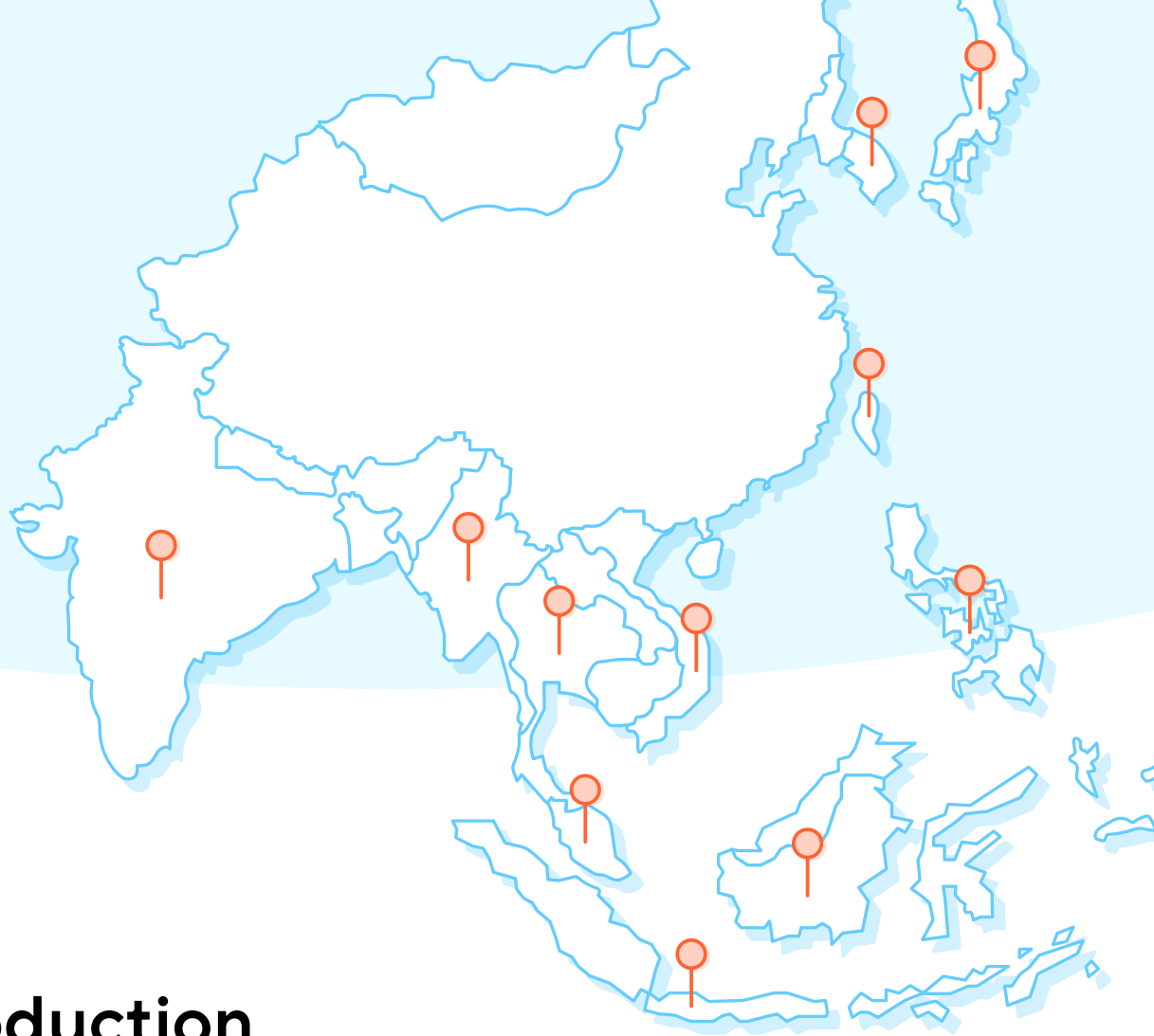


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# Introduction

App usage habits and trends saw a drastic change during 2020 as people all around the world turned towards mobile for entertainment, daily tasks and necessity during lockdowns. Within the APAC region, it wasn't just the number of sessions and installs that increased drastically, the time users spent in-app, the number of sessions they had per day, and the length of the average session also grew.

In this report, we take a deep dive into mobile performance in APAC, drawing on data and industry-insights to help marketers and developers understand users' trends in their region.

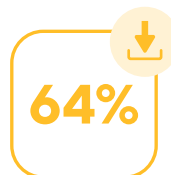
## The verticals:

We're shining a spotlight on fintech, e-commerce and gaming — focusing on everything from installs and sessions to reattributions, eCPI, paid and organic ratios and the number of partners that apps in these verticals are working with. We break non-hyper casual and hyper casual gaming into two distinct verticals, as user behavior and in-app trends are increasingly divergent.

## Industry trends and predictions:



APAC leads the world in mobile app download growth<sup>1</sup>



APAC accounts for 64% of global mobile app downloads<sup>2</sup>



45% of mobile app market growth is predicted to come from APAC between 2020 and 2024<sup>3</sup>



60% of mobile gaming revenue came from APAC in 2020<sup>4</sup>



By 2021, the number of mobile gamers in South East Asia will rise to 250 million<sup>5</sup>



Fintechs from APAC attracted USD 11.6 billion across 565 deals in 2020<sup>6</sup>



APAC's e-commerce sales are expected to nearly double to USD 2 trillion by 2025<sup>7</sup>

<sup>1</sup> <https://www.appannie.com/en/go/state-of-mobile-2020/>

<sup>2</sup> <https://www.businessofapps.com/data/app-statistics/>

<sup>3</sup> <https://www.businesswire.com/news/home/20210202006143/en/497.09-Billion-Growth-in-Global-Mobile-Apps-Market-During-2020-2024-Featuring-Key-Vendors-Including-Alphabet-Inc.-Amazon.com-Inc.-and-Apple-Inc.-Technavio>

<sup>4</sup> <https://globaldata.com/60-mobile-gaming-revenue-came-apac-region-2020-led-china-35-says-globaldata/>

<sup>5</sup> <https://www.prnewswire.com/news-releases/southeast-asia-gaming-market-forecasts-2020-2025-mobile-5g-and-esports-will-drive-growth-301105474.html>

<sup>6</sup> <https://ibsintelligence.com/ibsi-news/asia-pacific-records-usd11-6-billion-in-fintech-investment-report/>

<sup>7</sup> <https://www.businesswire.com/news/home/20210524005631/en/E-Commerce-Sales-in-Asia-Pacific-to-Nearly-Double-by-2025-Reaching-USD-2-Trillion>



## Top 3 takeaways

1

Installs and sessions in APAC grew by 31% and 54% respectively from 2019 to 2020, and are continuing to grow in 2021, demonstrating that the industry is hanging onto users acquired during lockdown and continuing to bring new users in.

2

Almost all verticals grew in the countries analyzed – with fintech and hyper casual gaming backing up their impressive lockdown spikes with sustained growth in 2021.

3

Retention rates were very consistent throughout 2020 despite the impacts of the pandemic – in Q4, the day 30 average was 5.68%

# Methodology

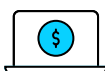
## Verticals:



**Fintech**



**Gaming - hyper casual & non-hyper casual**



**E-commerce**



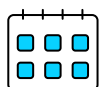
### **Dataset:**

A mix of Adjust's top 910 APAC-based apps and the total dataset of all apps tracked by Adjust. Our data comes from India, Indonesia, Japan, Malaysia, Myanmar, Philippines, Singapore, South Korea, Taiwan, Thailand and Vietnam.



### **Reattributions share and paid/organic:**

Reattributions share and paid/organic ratio are both expressed as ratios, where X:1. In the case of paid/organic ratio, a value of 3 (3:1) would mean for every 100 organic installs there are 300 paid installs. Similarly for reattributions share, a value of 0.7 (0.7:1) would mean for every 100 installs there are 70 reattribution.



### **Date:**

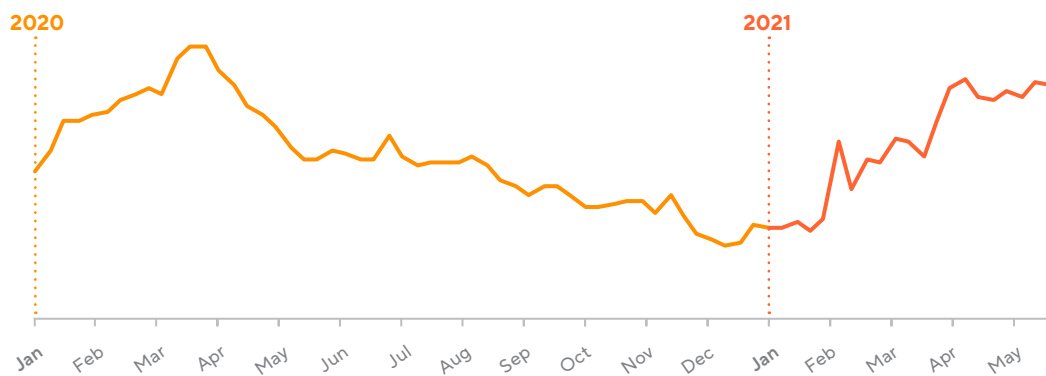
01.01.2019 - 31.05.2021



# Installs

When looking at all verticals, we see installs increase by 31% when comparing 2019 to 2020. We've also noticed the continuation of this growth has carried on into 2021, with installs up by another 4% and growing steadily. This is impressive considering the huge H1 spike in 2020 only started occurring during the first wave of lockdowns.

Installs across all verticals in APAC Q1 2020 - Q1 2021

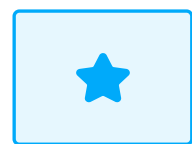
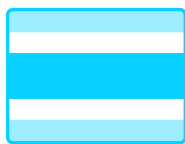
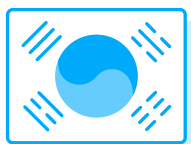
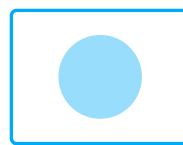
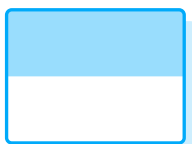
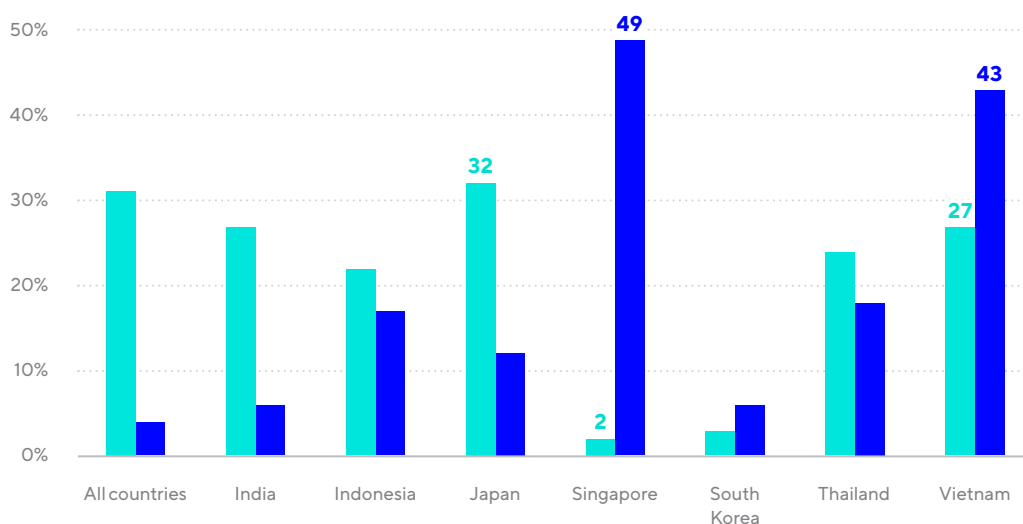


## Install growth by vertical and country

Installs grew for all countries analyzed from 2019-2020 and are continuing to grow so far in 2021, showing the strength of mobile growth in APAC. While this continued growth for many markets has been slower in 2021 (compared to the initial lockdowns and resulting installs in 2020), Singapore and Vietnam have posted highly impressive uptakes in 2021, growing up to 49% and 43% this year compared to 2% and 27% in 2020. Japan grew the most in 2020, jumping 32%, just above the regional average of 31%.

### Install growth by country

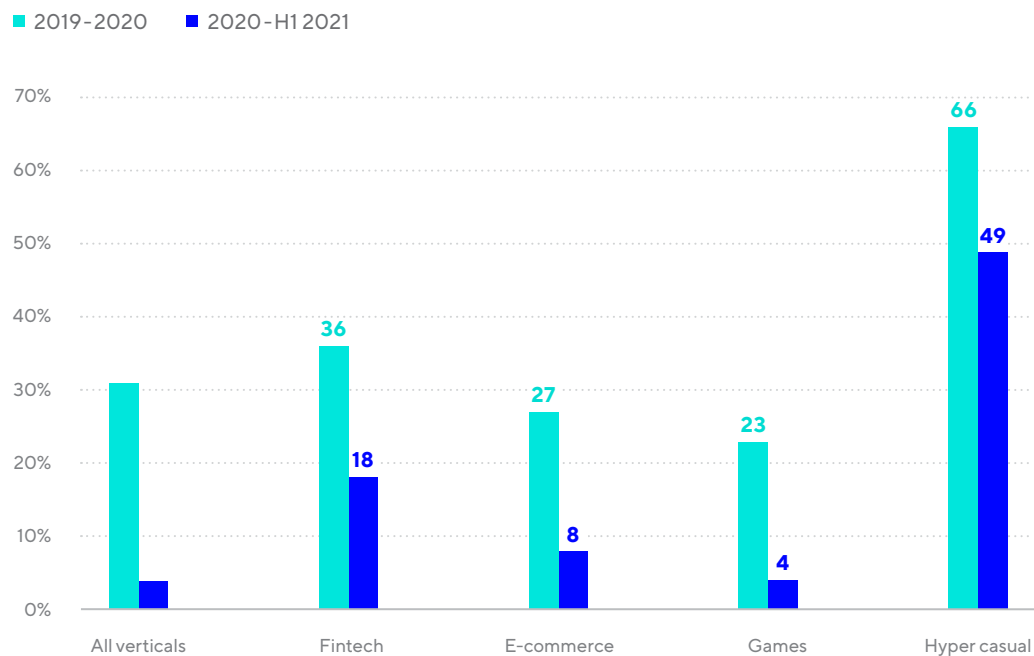
■ 2019-2020 ■ 2020-H1 2021





When breaking down install growth in APAC by vertical, we see that fintech, e-commerce, non-hyper casual games and hyper casual games all performed exceptionally well in 2020, and are all continuing to grow into 2021. Hyper casual grew the most in both time periods (66% and 49%) followed by fintech (36% and 18%) and e-commerce (27% and 8%). Non-hyper casual games came in last, but still performed well at 23% and 4%.

### Install growth by vertical



## Installs country vs vertical

### Fintech

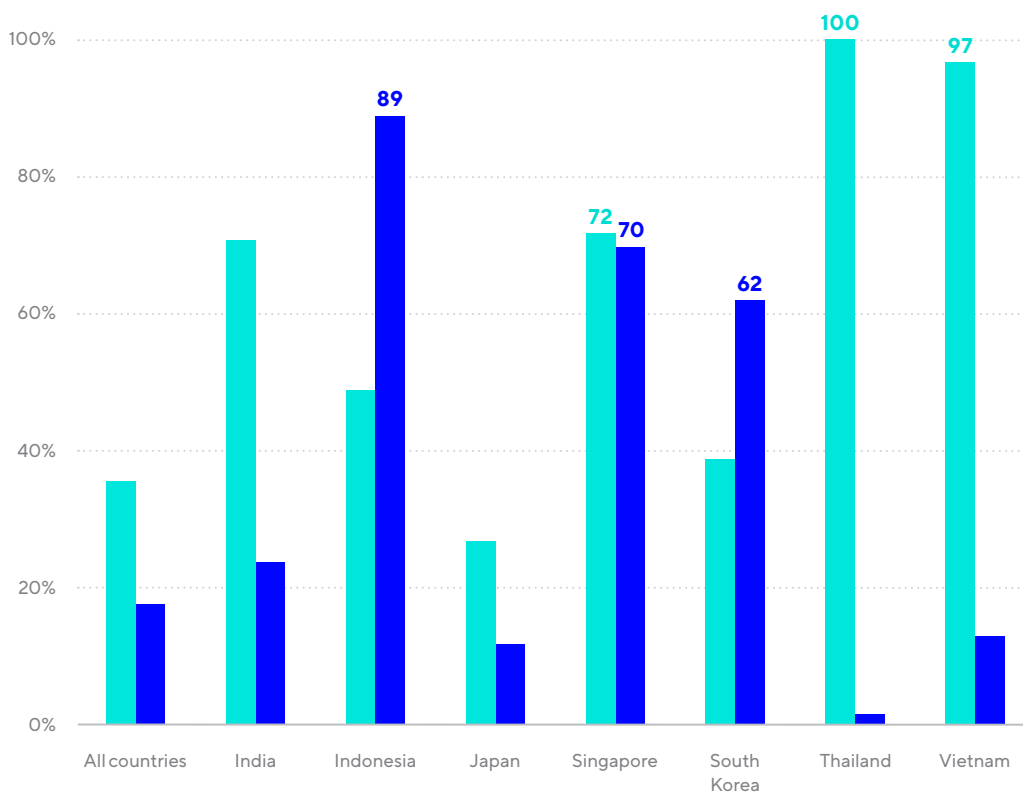
As more people turned to mobile banking and payments, fintech apps enjoyed a 36% increase in the number of installs in 2020. Thailand and Vietnam led the charge with massive increases of 100% and 97%, followed by Singapore at 72%. Moving into 2021, all markets have continued to grow, with Indonesia (89%), Singapore (70%) and South Korea (62%) being standouts.



Singapore has shown the most sustained installs growth in APAC in the fintech vertical, growing by **72%** in 2020 and **70%** in the first half of 2021.

### Fintech install growth by country

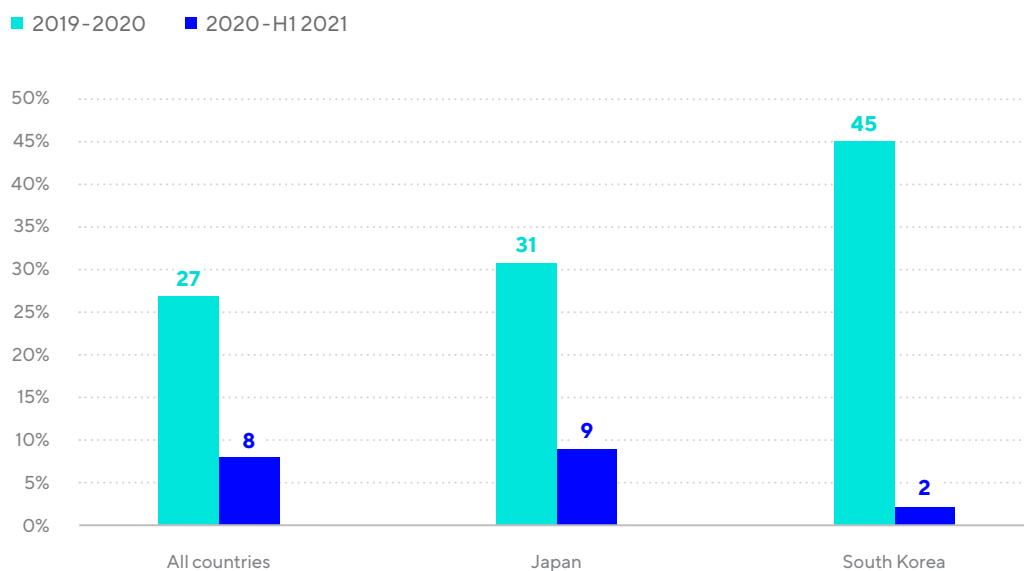
■ 2019-2020 ■ 2020-H1 2021



## E-commerce

Turning now to e-commerce installs, Japan and South Korea displayed the most impressive performance in the region. The average growth rate for APAC sat at 27% comparing 2019 to 2020 and at 8% from 2020 to H1 of 2021. Japan grew at a slightly higher rate of 31% and 9%, while South Korea eclipsed this in 2020 at 45% and has continued to grow into 2021, boasting a 2% boost in H1.

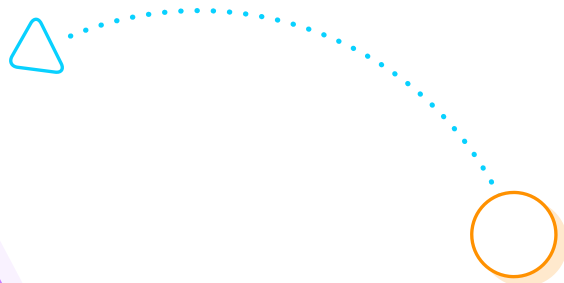
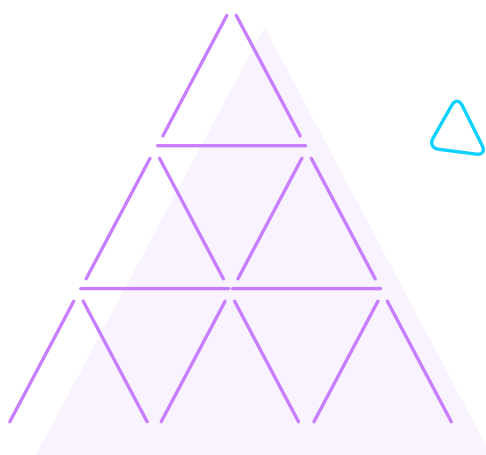
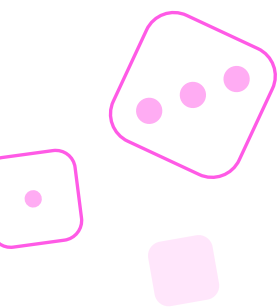
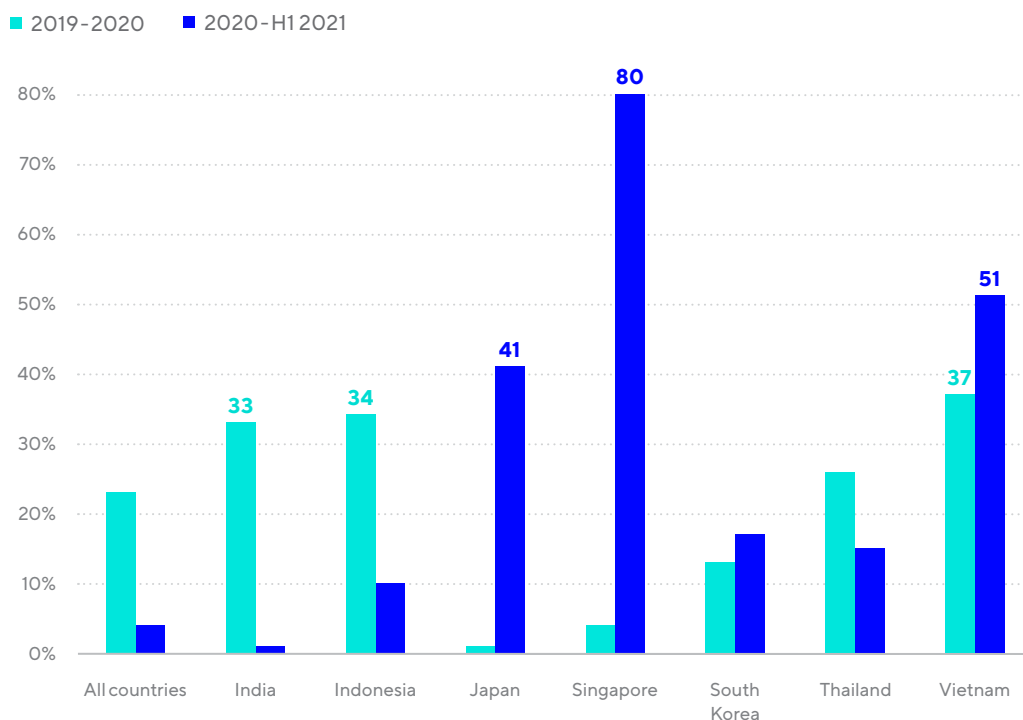
### E-commerce install growth by country



## Gaming

Hyper casual and non-hyper casual gaming both grew impressively from 2019 to 2020 and have continued to trend upwards in all APAC markets so far this year. The top-performing market for gaming in 2020 was Vietnam, which posted a 37% boost compared to 2019, followed closely by Indonesia at 34% and India at 33%. So far in 2021, it's Singapore (80%), Vietnam (51%) and Japan (41%) that are leading the pack.

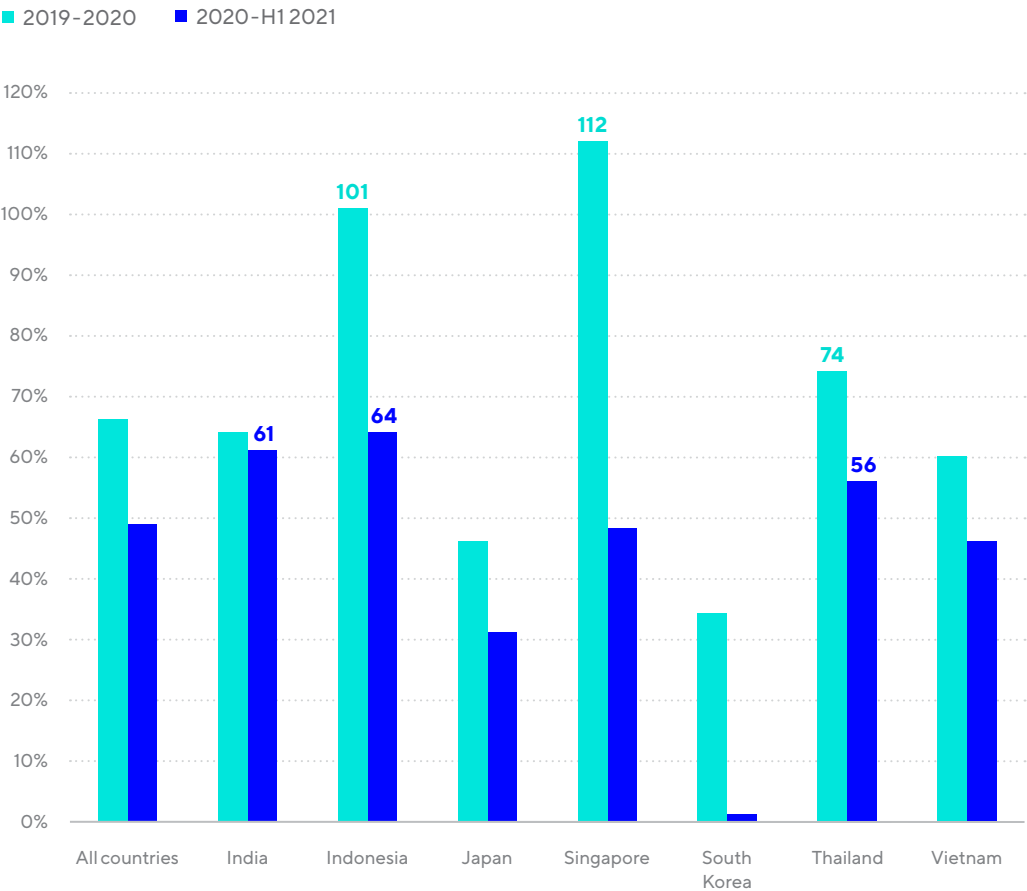
### Non-hyper casual gaming install growth

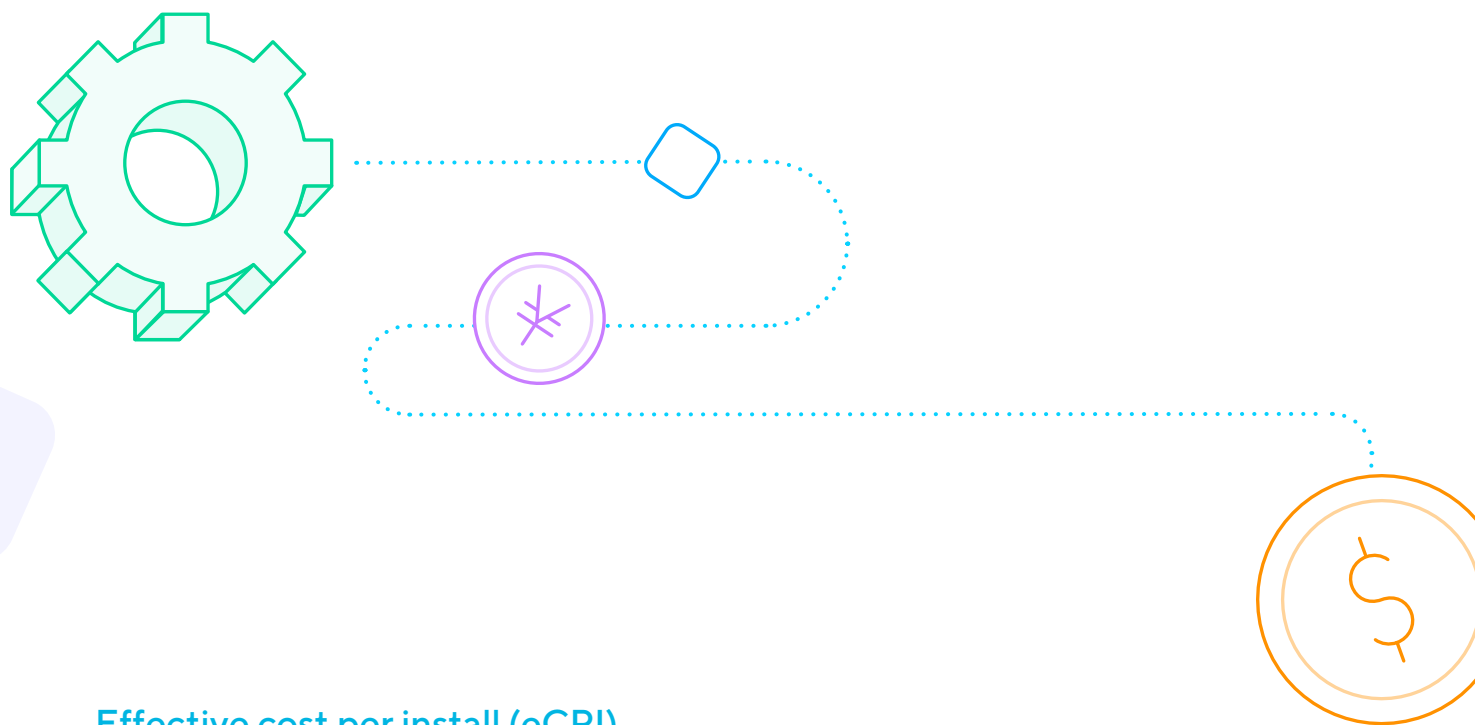




Hyper casual tells a slightly different story. While all markets grew, those topping the charts differed. In 2020, Singapore saw the most growth (112%), followed by Indonesia (101%) and Thailand (74%). The countries that have shown the most growth this year are Indonesia (64%), India (61%), and Thailand (56%).

Hyper casual gaming install growth

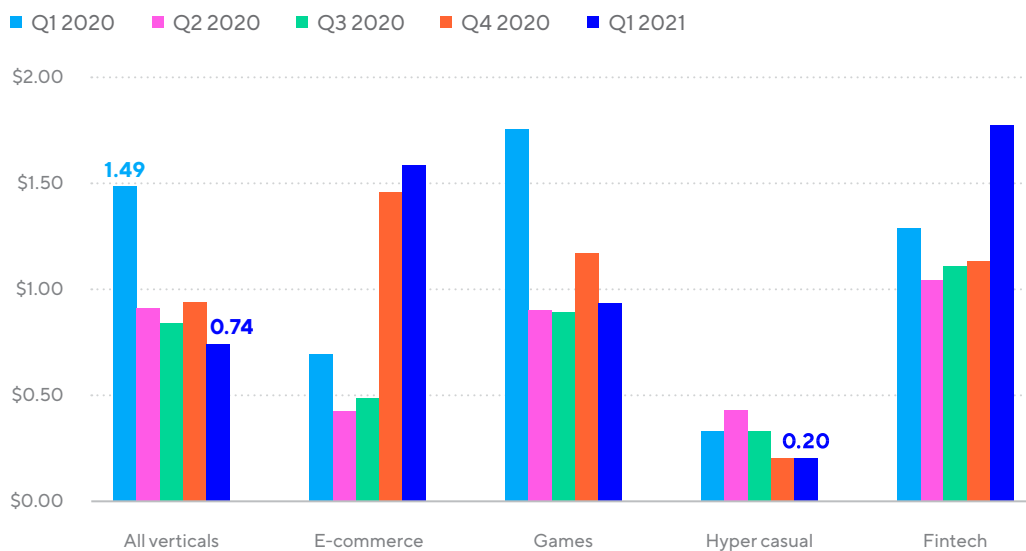




## Effective cost per install (eCPI)

Q1 of 2020 was the most expensive quarter overall in which to acquire users at a median of USD \$1.49 per install. From the verticals we examined only non-hyper casual games followed this trend. Installs in Q1 of 2021 had a significantly lower cost at USD \$0.74 a piece. E-commerce, games and fintech are all consistently more expensive across the board than the all-verticals average, but hyper casual is significantly cheaper – coming in as low as USD \$0.20 in the last two quarters.

### Effective cost per install by quarter in USD



## Paid vs. organic

Q1 of 2021 had a higher share of overall paid installs (0.24) than any quarter in 2020 – with higher figures showing in Q4 2020 (0.21) compared to the rest of the year.

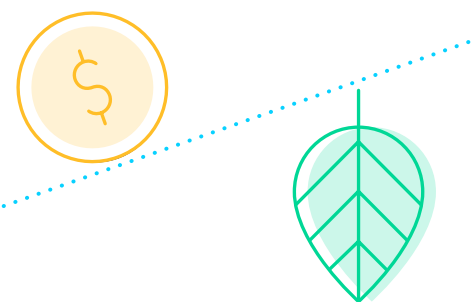
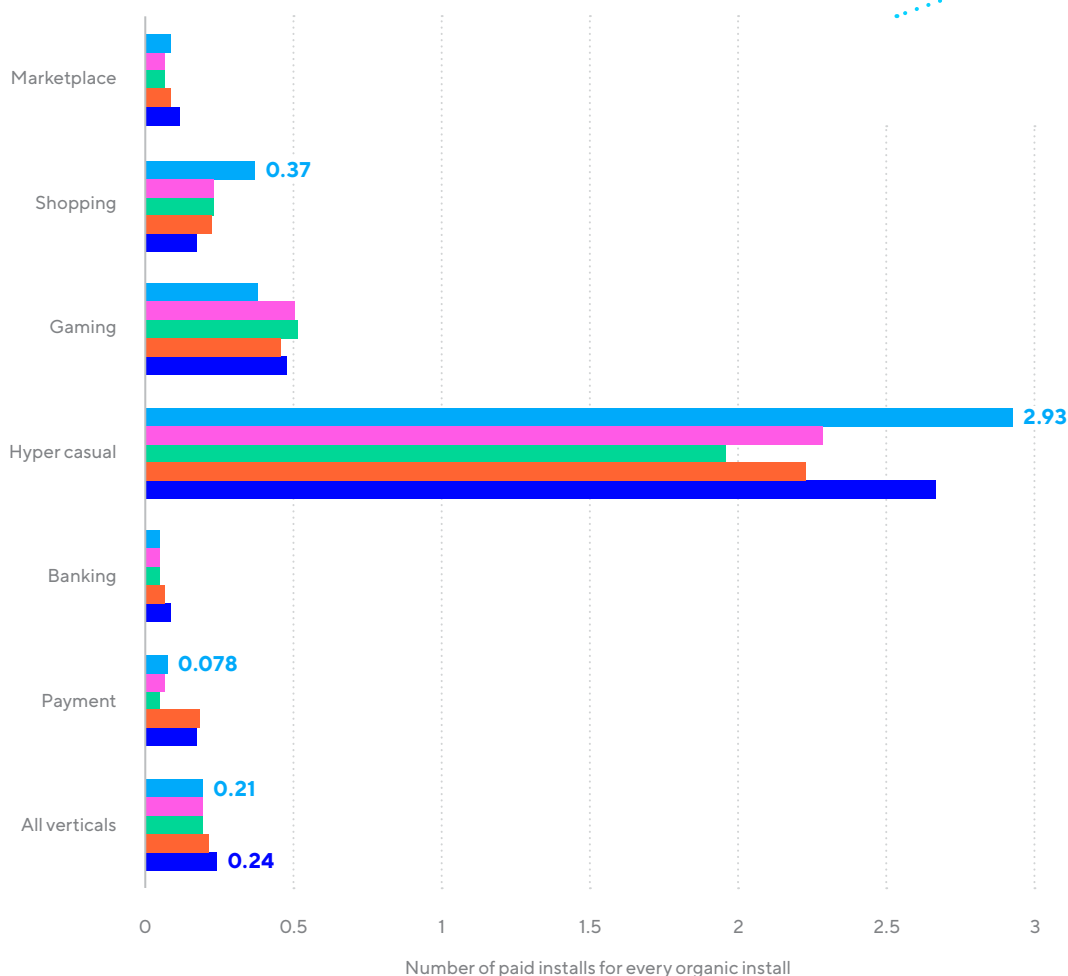
In complete contrast to eCPI, hyper casual has the highest paid/organic ratio of the verticals we examined, with Q1 of 2020 coming in at a ratio of 2.93. Notably, the paid/organic ratio for APAC is significantly lower than globally (although the differences between the verticals are very similar), where the highest point in 2020 reached 0.45.

While shopping reached a high of 0.85 in 2020, the highest it got in APAC was 0.37.

Similarly, payments reached 0.13 globally but peaked at 0.078 in APAC.

### Paid /organic ratio Q1 2020 to Q1 2021

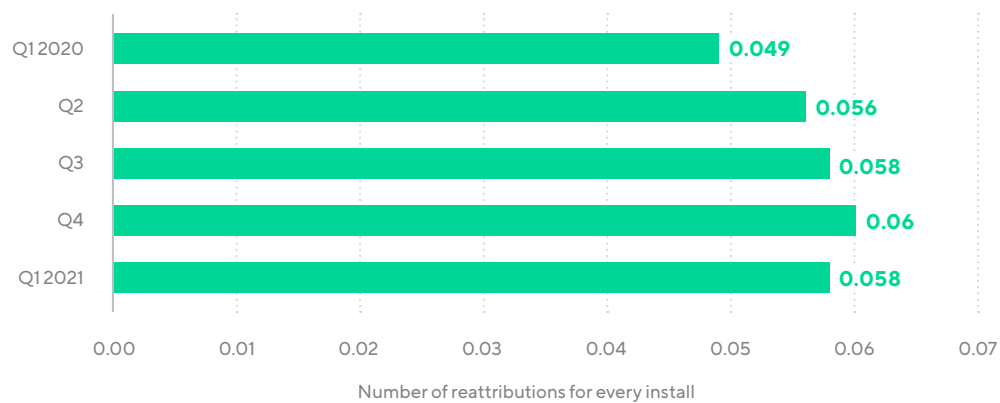
■ Q1 2020 ■ Q2 2020 ■ Q3 2020 ■ Q4 2020 ■ Q1 2021



## Reattributions share

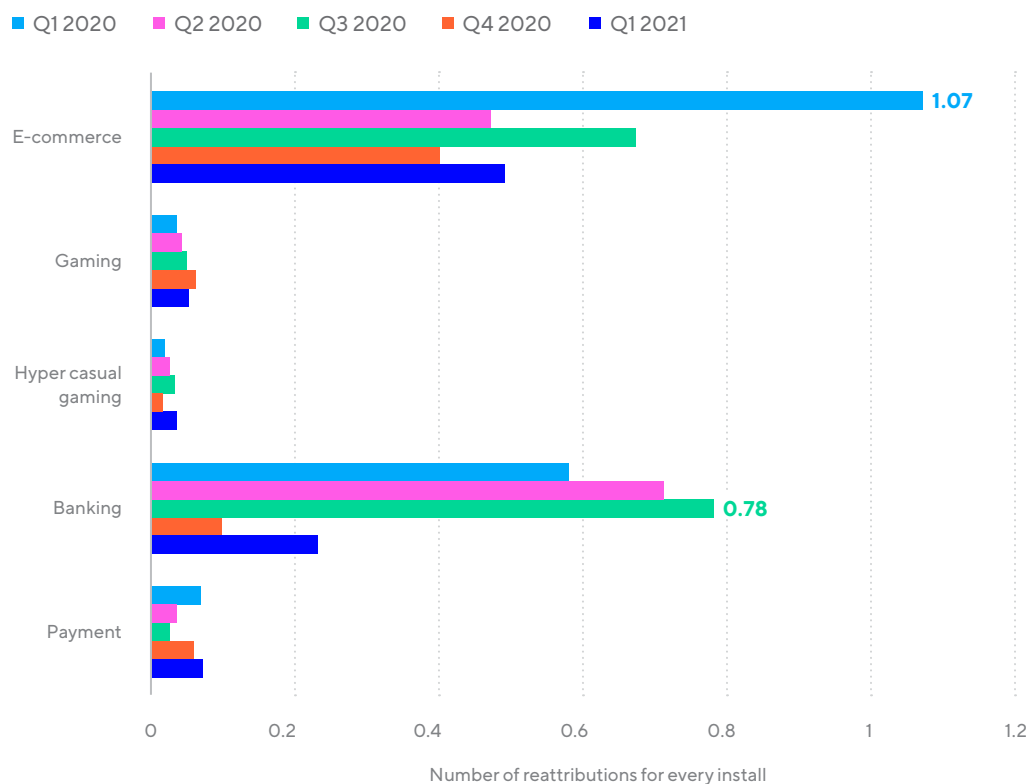
Overall, the number of reattributions for every install (the reattributions share), increased with each subsequent quarter in 2020, starting at 0.049 and reaching 0.06 by Q4. Q1 of 2021 sits at 0.058 – the same as Q3 2020. The reattributions share for APAC is also lower than on a global level, where the figures sit between 0.06 and 0.077.

### Reattributions share all verticals Q1 2020 to Q1 2021



Looking at the verticals, e-commerce and banking consistently have the highest number of reattributions, while hyper casual is the lowest. E-commerce peaked in Q1 of 2020 at 1.07 – banking reached as high as 0.78 in Q3.

### Reattributions share by vertical Q1 2020 to Q1 2021



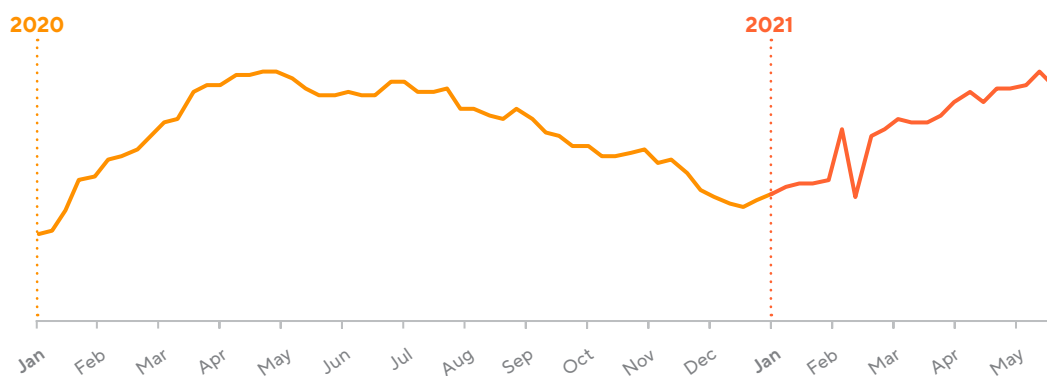




## Sessions and in-app patterns

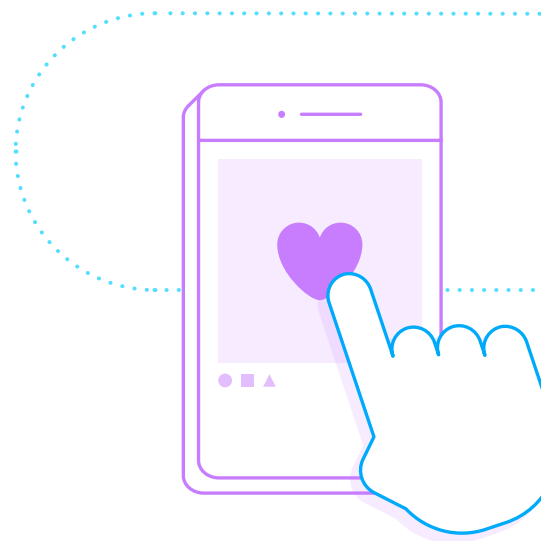
Sessions overall in APAC increased by 54% in 2020, a huge spike pushed largely by the move to mobile during lockdowns. While growth in 2021 has by no means been as explosive (currently sitting at 1% up from the 2020 average), it is continuing steadily and has almost leveled out with the 2020's Q1 peak. In fact, the second week of May was the highest performing week ever for sessions in APAC.

Sessions across all verticals in APAC Q1 2020 - Q1 2021



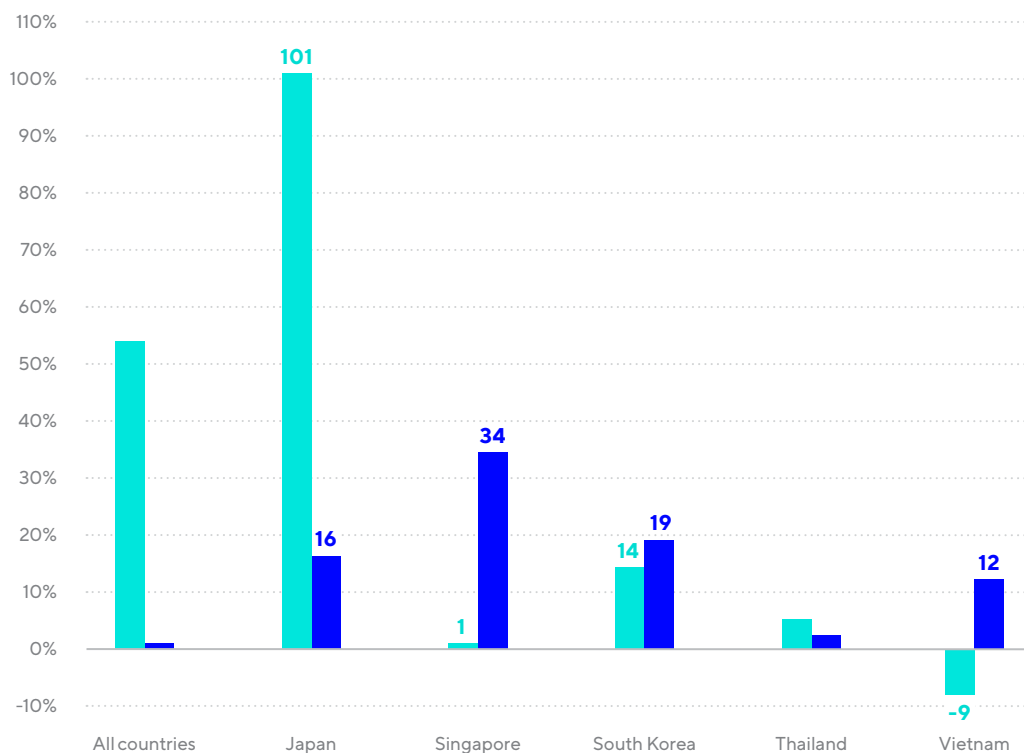
## Sessions country vs. vertical

The growth in sessions has not been as obviously impressive as the growth in installs — however the results are more optimistic than they first appear. Sessions in Japan grew exponentially from 2019 to 2020 (101%) and have continued to grow steadily into 2021, currently sitting at 16%. South Korea's 2021 growth (19%) is ahead of 2020 (14%) and Singapore, which only grew by 1% in 2020 is currently racing at 34% growth this year. Vietnam was the only country that didn't grow in 2020, decreasing by 9%. However, we see the inverse of this in 2021 with Vietnam's installs up 12%.



### Sessions growth by country

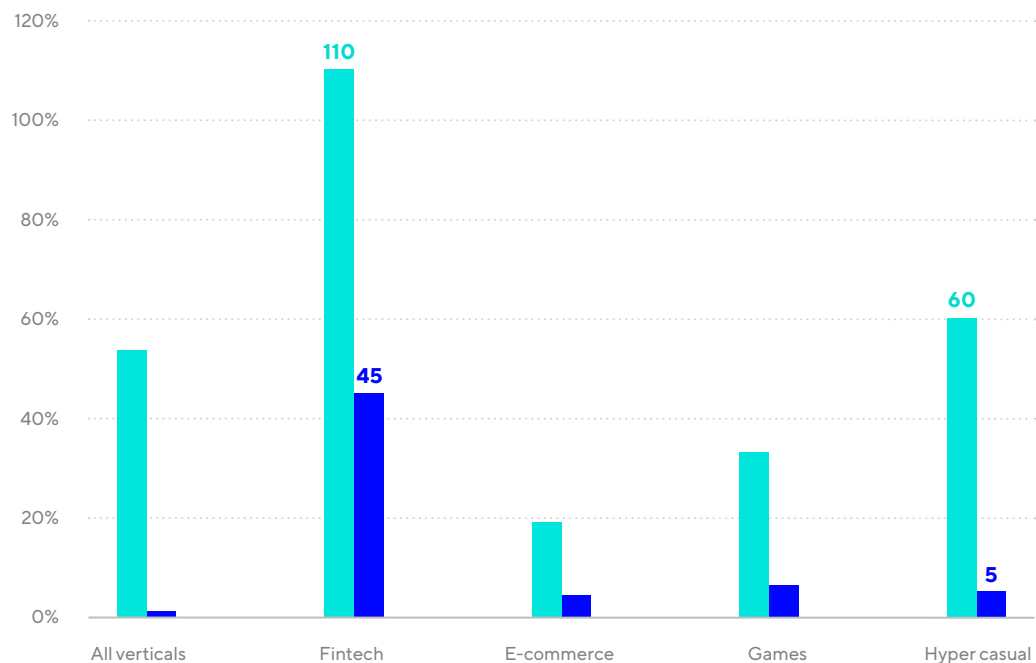
■ 2019-2020 ■ 2020-2021



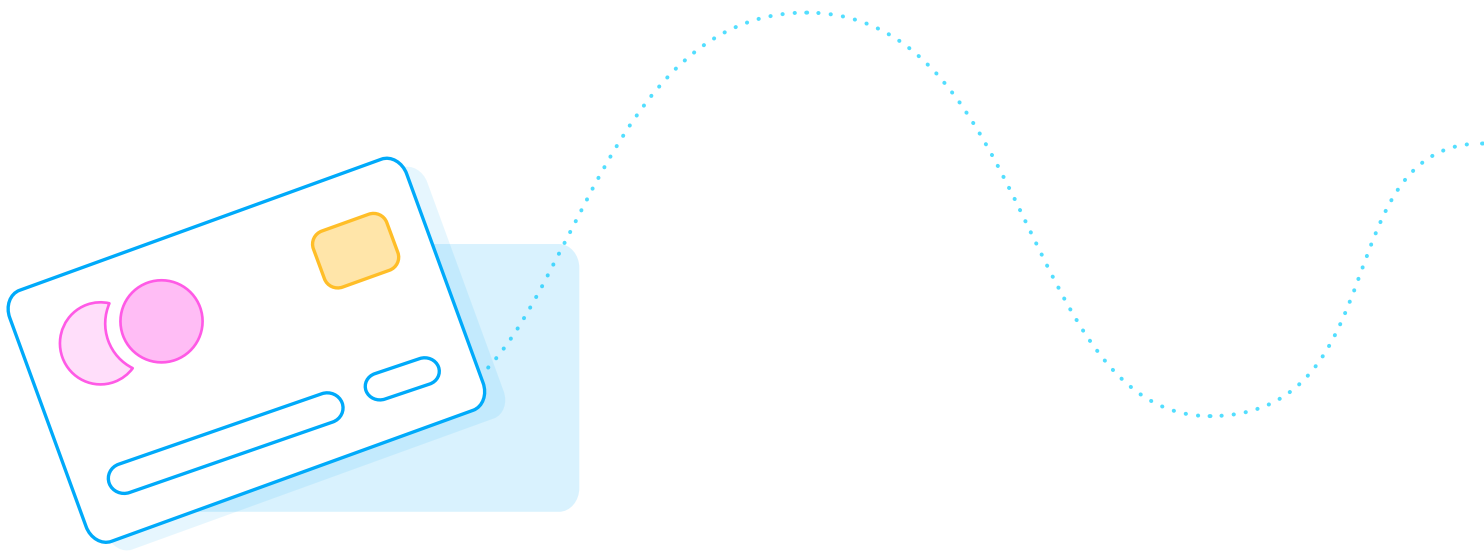
Looking at the verticals, fintech and hyper casual boomed in 2020, growing at 110% and 60% respectively – and this growth has continued well into 2021 at 45% (fintech) and 5% (hyper casual). E-commerce and non-hyper casual gaming also saw a considerable boost in 2020 and have backed it up with a continued spike in sessions so far this year.

### Sessions growth by vertical

■ 2019-2020 ■ 2020-2021



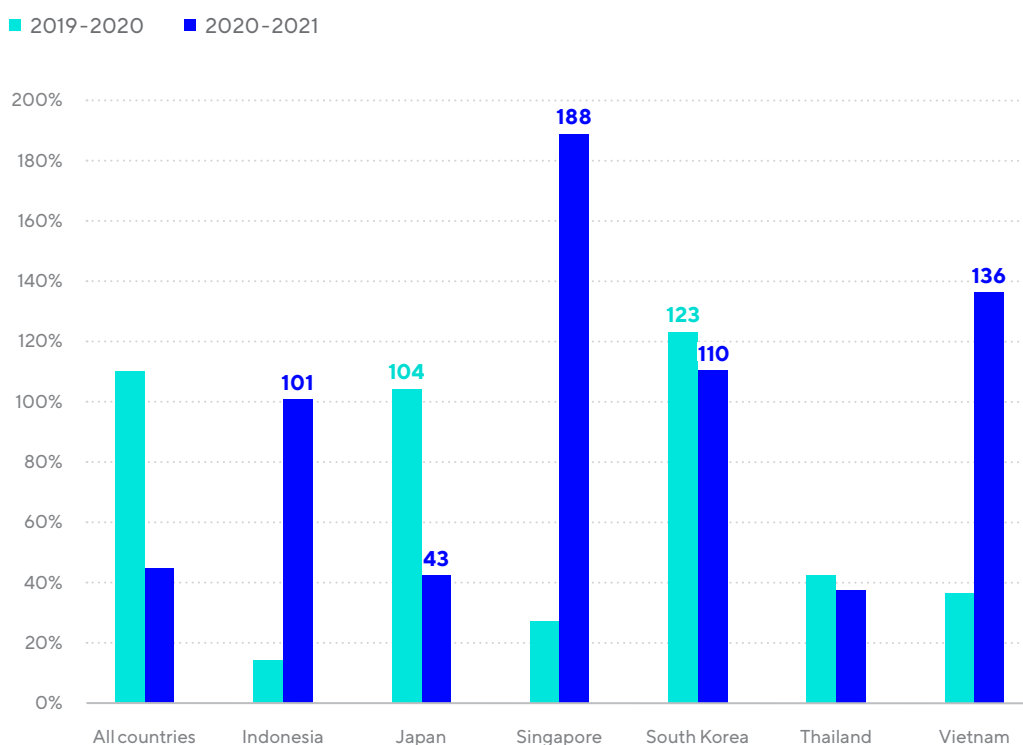




## Fintech

Fintech had an excellent 2020 in APAC, with South Korea and Japan seeing growth rates of 123% and 104% each. This success has rolled into 2021 as they've enjoyed continued growth of 110% and 43% respectively. It's Singapore (188%), Vietnam (136%) and Indonesia (101%) that are the real standouts so far in 2021.

### Fintech sessions growth

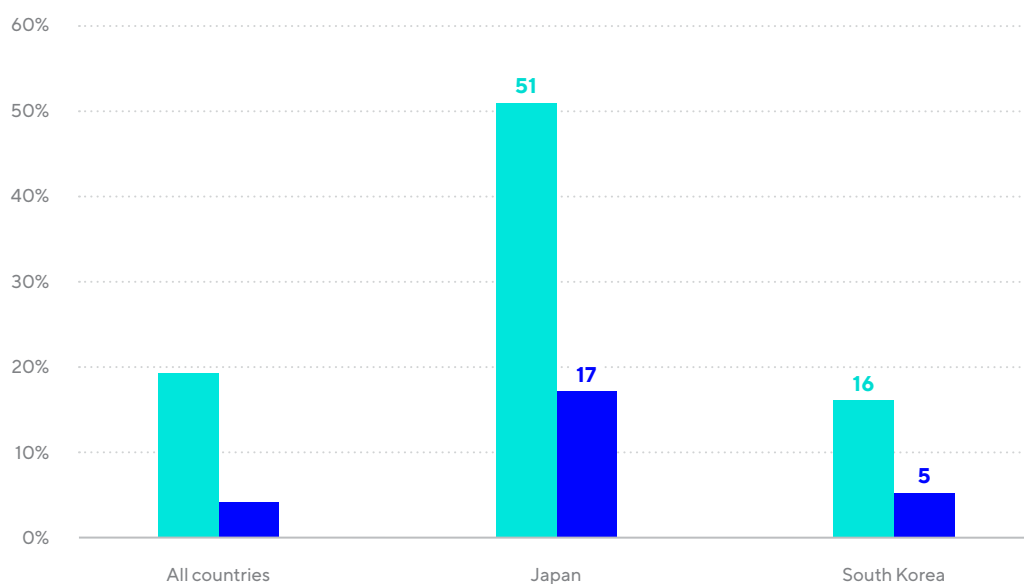


## E-commerce

As with installs, sessions for e-commerce in Japan and South Korea were also impressive in APAC. In Japan, sessions grew by 51% in 2020 and by 17% so far in 2021 – South Korea posted growth rates of 16% and 5%.

### E-commerce sessions growth

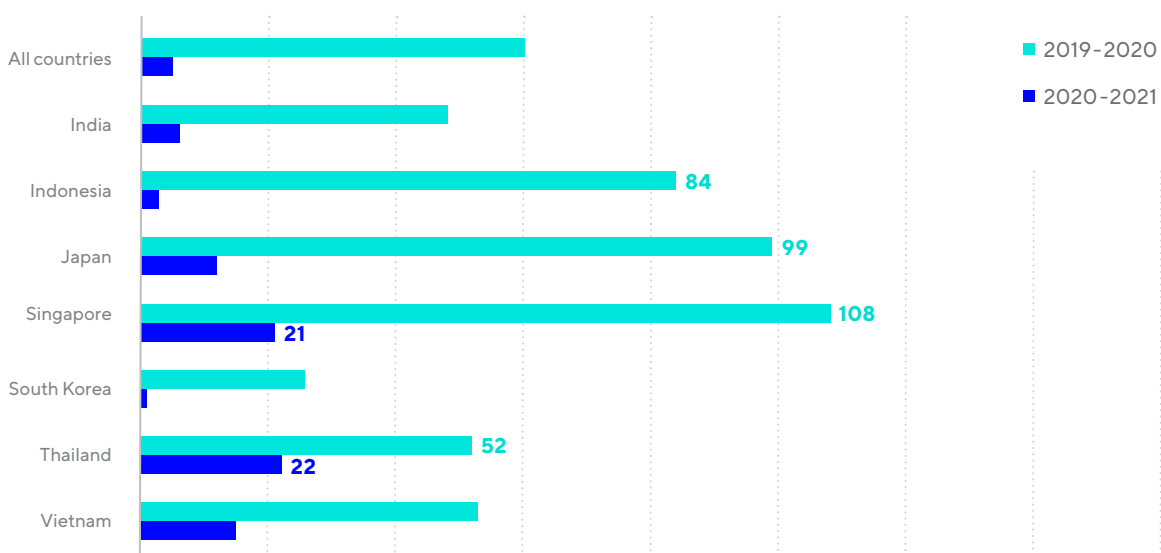
■ 2019-2020 ■ 2020-2021



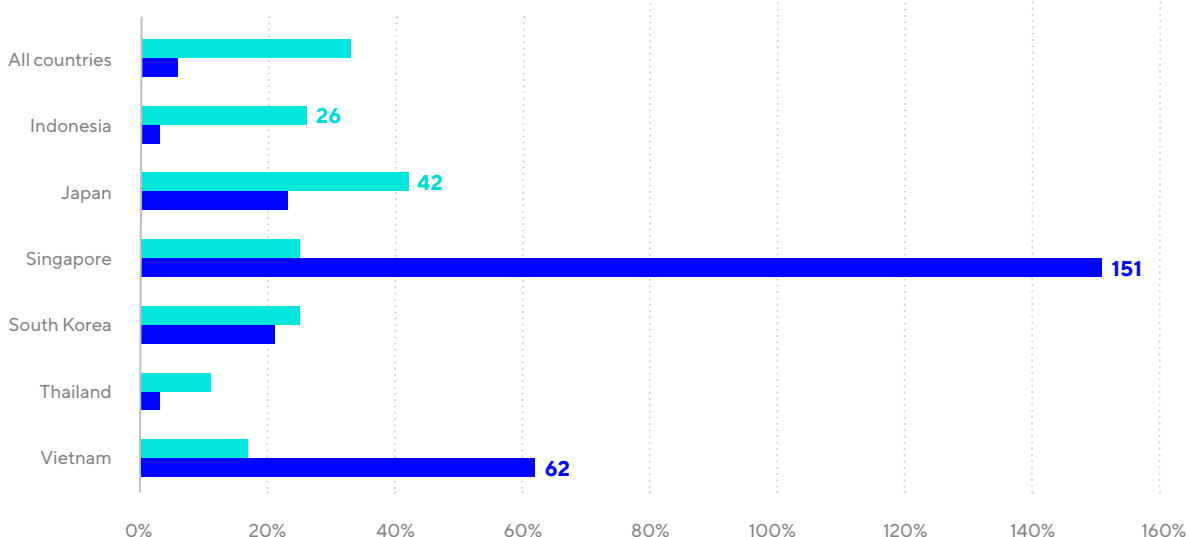
## Gaming

When it comes to gaming in APAC, **hyper casual** is really where the hype was in 2020, with all markets growing exponentially. Singapore and Japan grew by 108% and 99%, Indonesia by 84% and Thailand by 52%. Moving on to 2021, all markets have continued to grow, most notably with Thailand and Singapore at 22% and 21% respectively. Japan and Indonesia were the top two markets for **non-hyper casual** gaming in 2020, growing at 42% and 26% compared to 2019. So far this year, it's Singapore and Vietnam that are clocking the most non-hyper casual gaming sessions. Singapore grew by an enormous 151% – Vietnam follows at 62%.

### Hyper casual gaming sessions growth

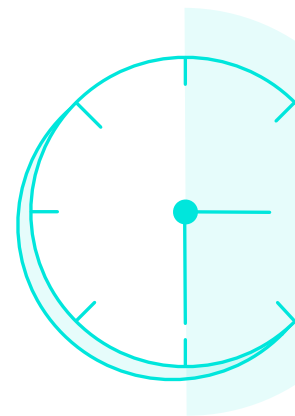


### Non-hyper casual gaming sessions growth



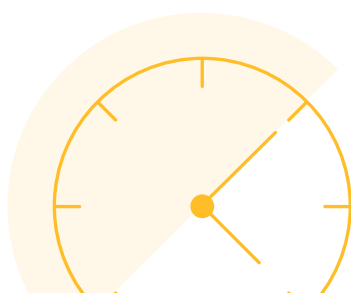
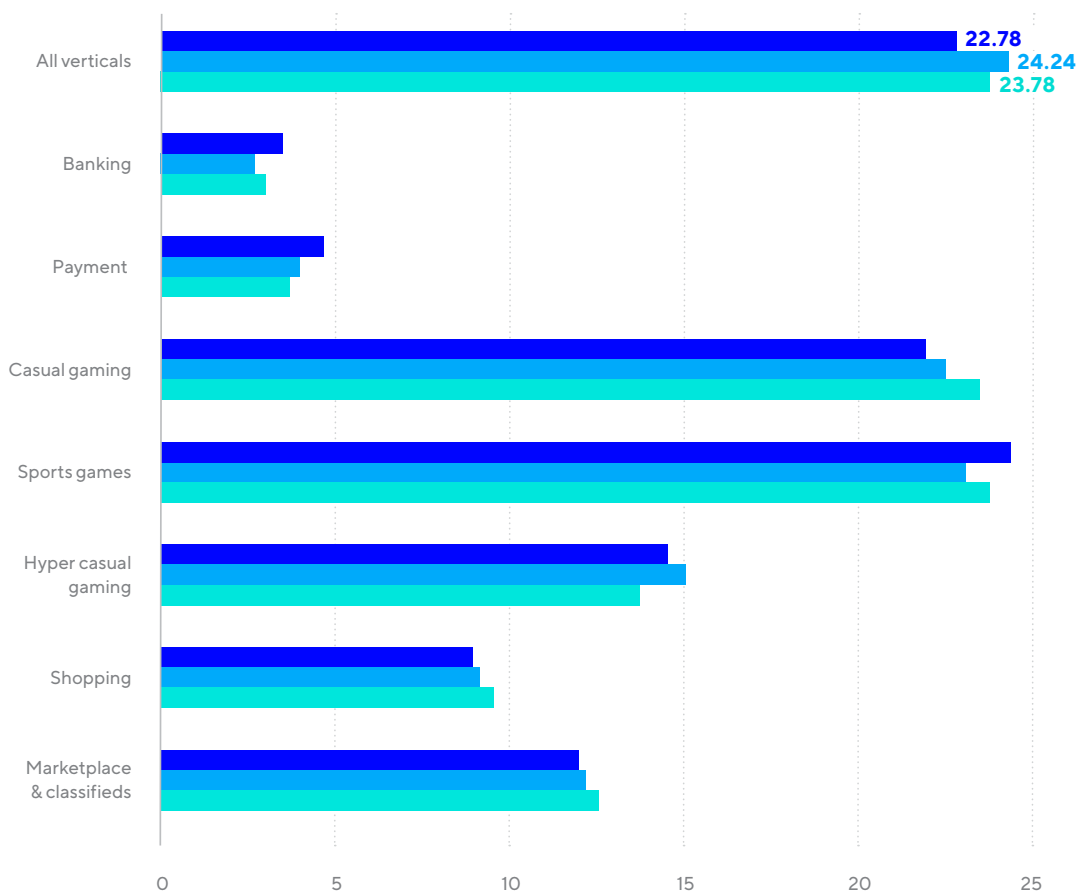
## Average session length

Average session lengths increased from 23.78 minutes in 2019 to 24.24 minutes in 2020 – but have regressed slightly to 22.78 minutes for Q1 2021. Session lengths in APAC are significantly longer than the global averages, where 2019 and 2020 came in at 19.09 minutes and 20.04 minutes each.



### Average session length in minutes

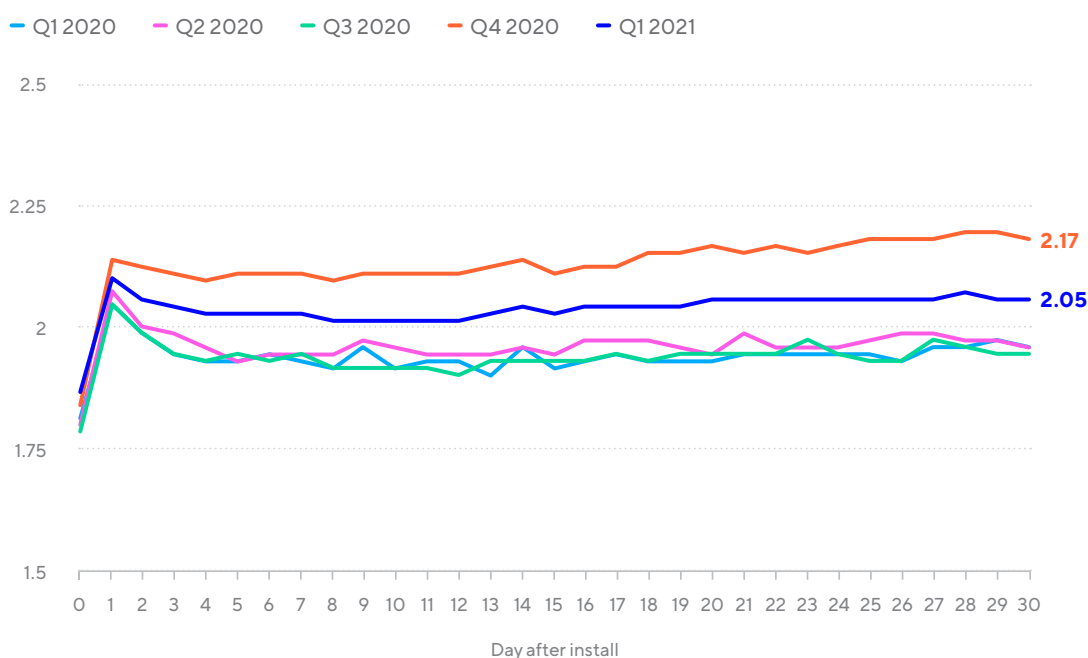
■ Q1 2021 ■ 2020 ■ 2019



## Sessions per user per day

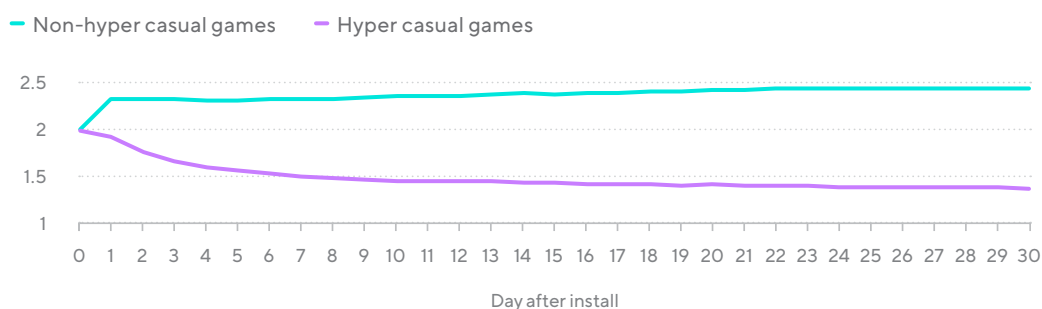
It wasn't just sessions and installs that increased throughout 2020 – users were also highly active in-app, engaging in more sessions per day on average throughout the year. This reached its peak in Q4, where day 30 users had an average of 2.17 sessions per day. Q1 of 2021 was also up compared to the first three quarters of 2020, at 2.05 sessions per day by day 30.

### Sessions per active user per day Q1 2020 to Q1 2021



Gaming is really where the figures get interesting. The difference between non-hyper casual and hyper casual is as stark as ever. Taking a closer look at Q4 for example, we see that two subverticals, as expected, go on completely opposing trajectories.

### Gaming sessions per active user per day



## Time spent in-app

When comparing Q4 of 2020 to Q1 of 2021, we see that the amount of time spent in-app decreased slightly – but that the average number of minutes remains high. We predict that, as with 2020, this will continue to grow throughout the year and that Q4 of 2021 will be higher than Q4 of 2020.

### Q4 2020

Vertical	Day 0	Day 1	Day 3	Day 7	Day 30
All Verticals	11	27	24	22	22
Gaming	24	57	52	50	48
Hyper casual	10	17	12	10	8
E-commerce	4	11	9	8	8
Fintech	2	5	4	4	3

### Q1 2021

Vertical	Day 0	Day 1	Day 3	Day 7	Day 30
All Verticals	9	23	20	19	18
Gaming	24	50	50	48	47
Hyper casual	9	16	12	9	7
E-commerce	3	10	9	7	7
Fintech	2	5	4	3	3

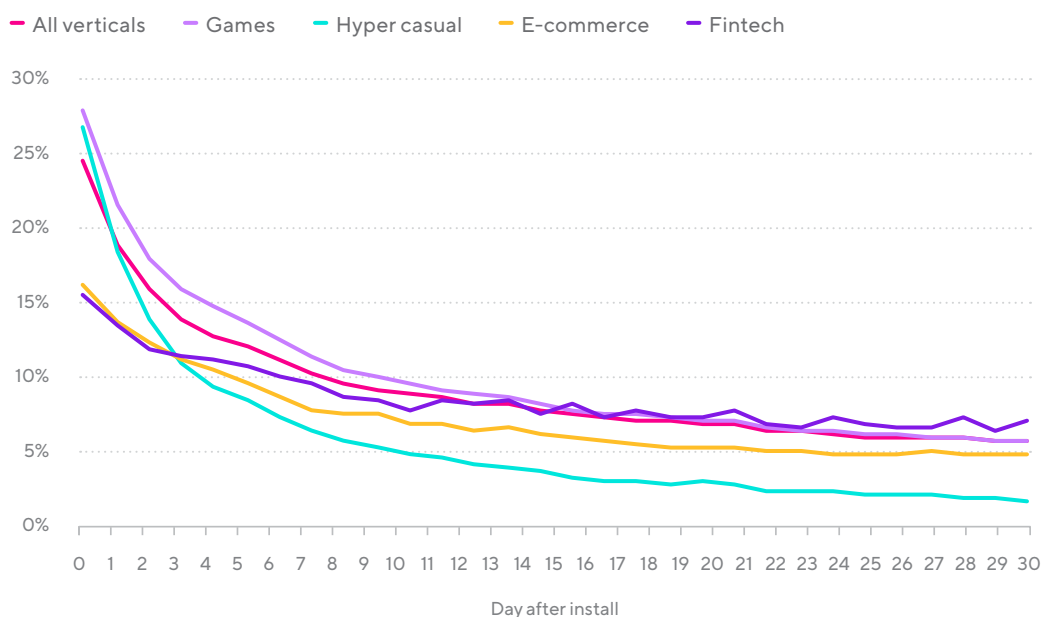


# Retention rates

Retention rates were very consistent through 2020 in APAC, showing just how well the industry adapted to the large number of users acquired during lockdowns. Putting Q4 under the microscope, we can see the differences between the verticals — retention for fintech is exceptionally high, while, as expected, hyper casual gaming (with its simple game mechanics and focus on snowballing), by nature, does not excel in this department.

Where non-hyper casual gaming holds on to 5.64% of users by day 30, hyper casual only has 1.69% of its cohort. Fintech keeps 7.14%, well above the overall average of 5.68%. E-commerce sits at 4.74% on day 30 — but has an impressive 8.59% still engaged on day 7, presenting a case for consistently retargeting users in the first week.

## Retention rates by vertical Q4 2020





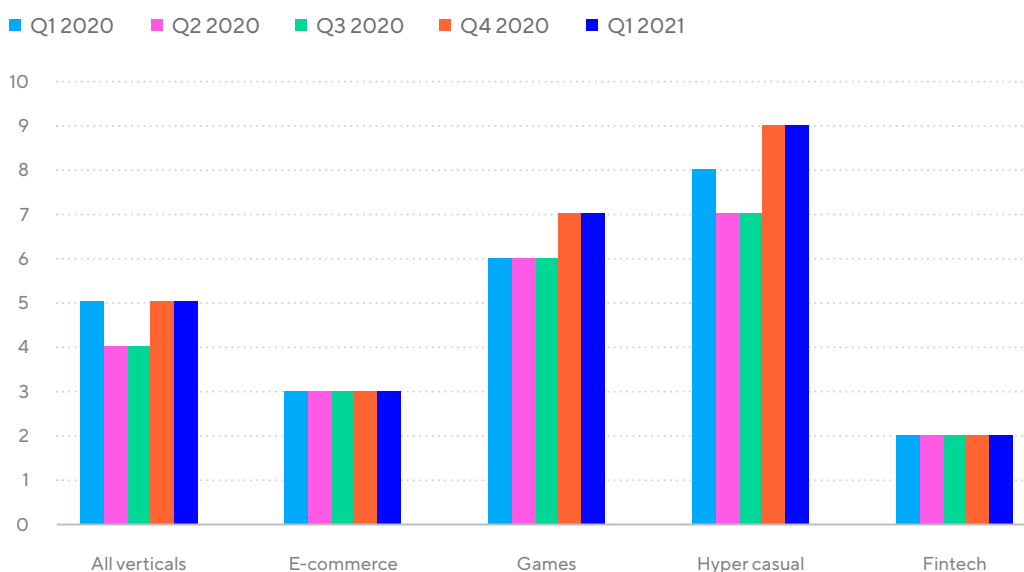


## Partners per app

The number of partners that apps work with varies greatly between each vertical, and is relatively consistent across the quarters. Non-hyper casual and hyper casual games both work with more partners than average (as many as 9) while fintech works with the least with only 2.

All verticals in APAC work with less partners than the global average – where fintech in APAC works with 2, fintech globally works with 3. This goes for e-commerce apps too, which in APAC work with an average of 3 partners but globally with an average of 4. This indicates the potential for APAC apps to work with more partners to potentially find their next swathe of new users.

### Number of partners per app Q1 2020 to Q1 2021



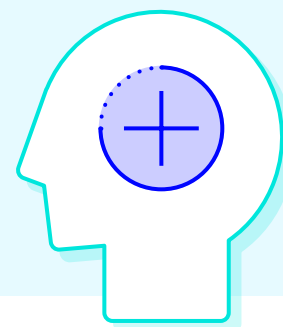


# Conclusion

The key to successfully marketing an app is understanding the nuances of the vertical and subverticals in which it belongs. The differences on a sub-vertical level might be exceedingly obvious — as with hyper casual gaming — but the user behaviors and in-app patterns can also be deceptively subtle. The number of installs and sessions taking place within a particular vertical or region is an important indicator of how popular or necessary certain types of apps are, particularly as mobile adoption continues to rise in the APAC region. But it's the more granular data points that help you understand what users expect and how you can optimize your in-app experience to better meet their needs.

## Marketers are then able to drill into and analyze the amount of time users:

- Spend in their apps
- When they're coming back to their apps
- How many times they're coming back per day
- When they're dropping off
- What their pain points are
- How they behave depending on where they've been acquired



Marketers will then be empowered to map their users' journeys, which will in turn help them to test and optimize campaigns to yield more impressive results.

More people in APAC are turning towards mobile and digital solutions for entertainment and daily tasks than ever before. To truly stand out in this region, developers and marketers need to be more data-driven, focus on perfecting their UX — and prepared to adapt to the ever growing and changing mobile ecosystem.

With iOS 14.5+ redefining how we approach UA as an industry, and with Android 12 changes on the horizon, the importance of A/B testing and gaining a deeper user understanding are becoming increasingly important. It's critical to have an expert understanding of UA and to be laser-focused on user behaviors that lead to high lifetime value (LTV).

# About MMA

Comprised of over 800-member companies globally and 15 regional offices, the MMA is the only marketing trade association that brings together the full ecosystem of marketers, tech providers and sellers working collaboratively to architect the future of marketing, while relentlessly delivering growth today.

Led by CMOs, the MMA helps marketers lead the imperative for marketing change – in ways that enable future breakthroughs while optimising current activities. The MMA is committed to science and questioning and believes that creating marketing impact is steeped in constructively challenging the status quo, encouraging business leaders to aggressively adopt proven, peer-driven and scientific best practices, without compromise.

The MMA invests millions of dollars in rigorous research to enable marketers with unassailable truth and actionable tools. By enlightening, empowering and enabling marketers, the MMA shapes the future of modern marketing propelling business growth.

- 1 To cultivate inspiration by driving innovation for the Chief Marketing Officer.
- 2 To build the modern marketing capabilities for marketing organizations through fostering know-how and confidence.
- 3 To champion the effectiveness and impact of modern marketing through research providing tangible ROI.
- 4 To advocate for modern marketers.

Anchoring the MMA's mission are four core pillars; to cultivate inspiration by driving innovation for the Chief Marketing Officer; to build marketing capabilities for marketing organizations through fostering know-how and confidence; to champion the effectiveness and impact through research providing tangible ROI measurement; and advocacy .

Members include: HUL, McDonalds , ITC Limited, L'Oreal, HDFC Bank, Mondelez, Diageo, ICICI Bank, Flipkart, Reckitt Benckiser, Perfetti Van Melle, Autumn Grey group, ABG, GroupM, DAN group, Httpool, SonyLIV, Kantar, InMobi, AdColony, Spotify, JioSaavn, Google, Facebook, Intel, Disney+Hotstar, MX Player, Double Verify, Blis and many more. The MMA's global headquarters are located in New York with regional operations in Asia Pacific (APAC), Europe/Middle East/Africa (EMEA) and Latin America (LATAM).

For more information, see <https://www.mmaglobal.com/local-councils/india>



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# MMA AMMP Community

The MMA AMMP Community is a credible industry resource centre for everything one needs to know on modern marketing.

The circumstances of 2020 accelerated digital innovation and adoption by several years hence for MMA it becomes the best time to showcase growth frameworks, opportunities in the space of modern marketing.

With this in mind, in 2021, MMA brought together a high-powered ecosystem to 'Accelerate Modern Marketing Practices'(AMMP).

**The MMA AMMP Community is a specialized task force with elite leaders across the below six core councils:**

- Martech
- E-Commerce
- Voice & Audio
- Brand Safety
- Creativity
- Media Effectiveness

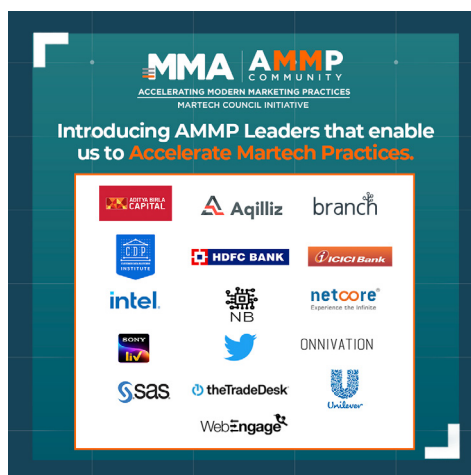
The key objective of the taskforce is to enable resources, tools, evangelism and education to accelerate modern marketing practices in the ecosystem.



Below is an overview of our taskforces that enable AMMP:



The **E-Commerce Council** seeks to build an overall understanding of the ecosystem and address cluster-specific issues, build capability in the Omni Channel Marketing and streamline the ecosystem through building a common vocabulary and enable industry standards.



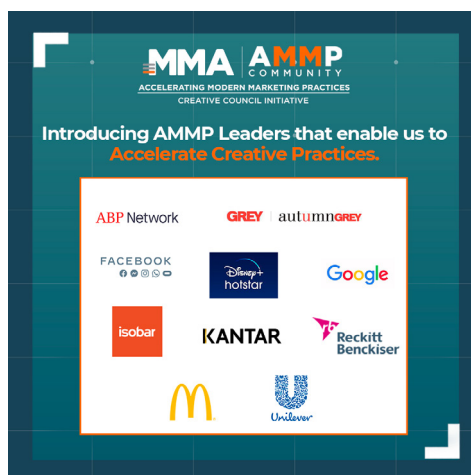
The **MarTech Council** objective is to enable pioneering marketers to understand the dynamically evolving nature of modern marketing. The Council seeks to add value to marketers by helping them to assess & adopt the right Martech stack, enabling business transformation and optimise marketing KPIs.



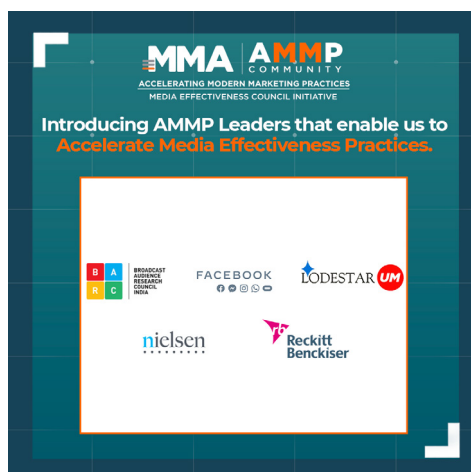
The **Voice & Audio Council** seeks to create leadership & evangelism for marketers to better understand the dynamically evolving nature of voice marketing and enable guidelines, use cases, expertise to exploit the platform.



The **Brand Safety Council** works on enabling best practices, standards & guidelines for brand marketing & performance marketing by driving compliance at various levels in the ecosystem amongst stakeholders to deter ad-fraud.



The **Creative Council** works extensively in building guidelines and best practices for effective short-format advertising content.



The **Media Effectiveness Council** seeks to enable POV on cross-media reach and mobile effectiveness versus other media & assess the impact of new media on business outcomes.

To learn more about the AMMP Community & its initiatives, [click here](#)

Become a part of the AMMP Community, contact us at [mmaindia@mmaglobal.com](mailto:mmaindia@mmaglobal.com)



## ABOUT ADJUST

Adjust is the mobile marketing analytics platform trusted by growth-driven marketers around the world, with solutions for measuring and optimizing campaigns and protecting user data. Adjust powers thousands of apps with built-in intelligence and automation, backed by responsive global customer support.

In 2021, Adjust was acquired by AppLovin, a leading marketing software company providing developers with a powerful, integrated set of solutions to grow their mobile apps.

Learn more about Adjust at :

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