

# App Annie

## Japan and Global App Trends

Mobile Monday  
May 2014

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Country Director - Japan



## THE MATH BEHIND THE APP STORES

# Japan and Global App Trends

1. App Annie Overview
2. App Store Trends
3. Country Trends
4. Category Trends
5. Device Trends
6. Top Publishers and Apps
7. Top Publishers in Japan



# App Annie is the #1 Provider of App Store Intelligence

1950's



**Broadcast**  
Market data for TV, Radio and  
Print.

1990's



**Web**  
Market data for websites.

2010's



**App Stores**  
Market data for the  
leading stores.

*App Annie*

# #1 App Store Analytics and Market Data

Games |         

Social |        

Investors |        

Platforms / Mobile |       

Media / Entertainment |         

Advertising |       

And many more...

App Annie products are used by **90% of the top 100 publishers\***  
and have more than **210,000** registered business users

\* 90% Penetration on iOS and Google Play based on Top 100 highest grossing publishers globally using App Annie Store Stats (March 2014)

# App Annie Products: The Industry Standard

## Analytics



Track your **own apps'** and **e-books'** actual sales, downloads, and reviews. Track your ad revenue and ad spend.

**Used by over 400,000 apps.**

## Store Stats



Track the rank, pricing and placement of **any app and e-book.**

**Following 4,200,000+ apps.**

## Intelligence



Obtain the most accurate estimates of revenues and downloads for **any app.**  
**Purchased by 9 of the top 10 publishers.**

App Annie Supports\*



iOS



Mac



Google Play



Amazon



Windows 8

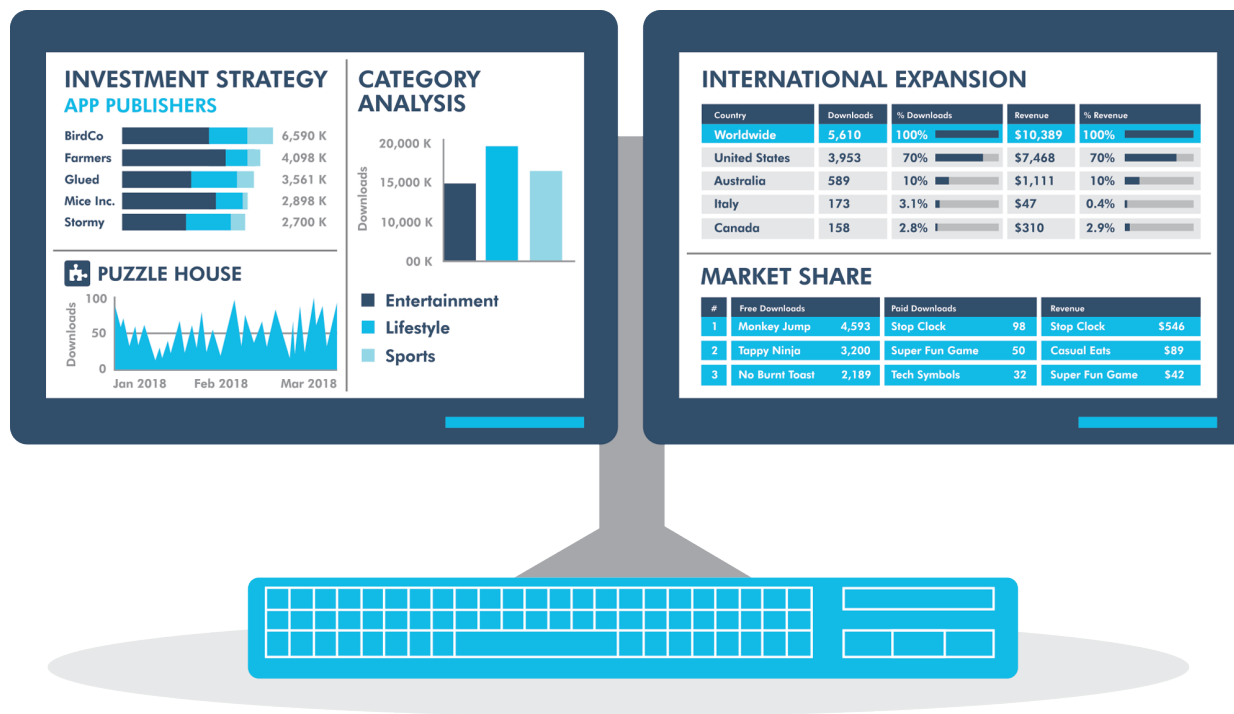


\* Support of each platform varies by product

# This Presentation is Powered by App Annie Intelligence

The most accurate market data available for the app stores

[appannie.com/intelligence](http://appannie.com/intelligence)



# Japan and Global App Trends

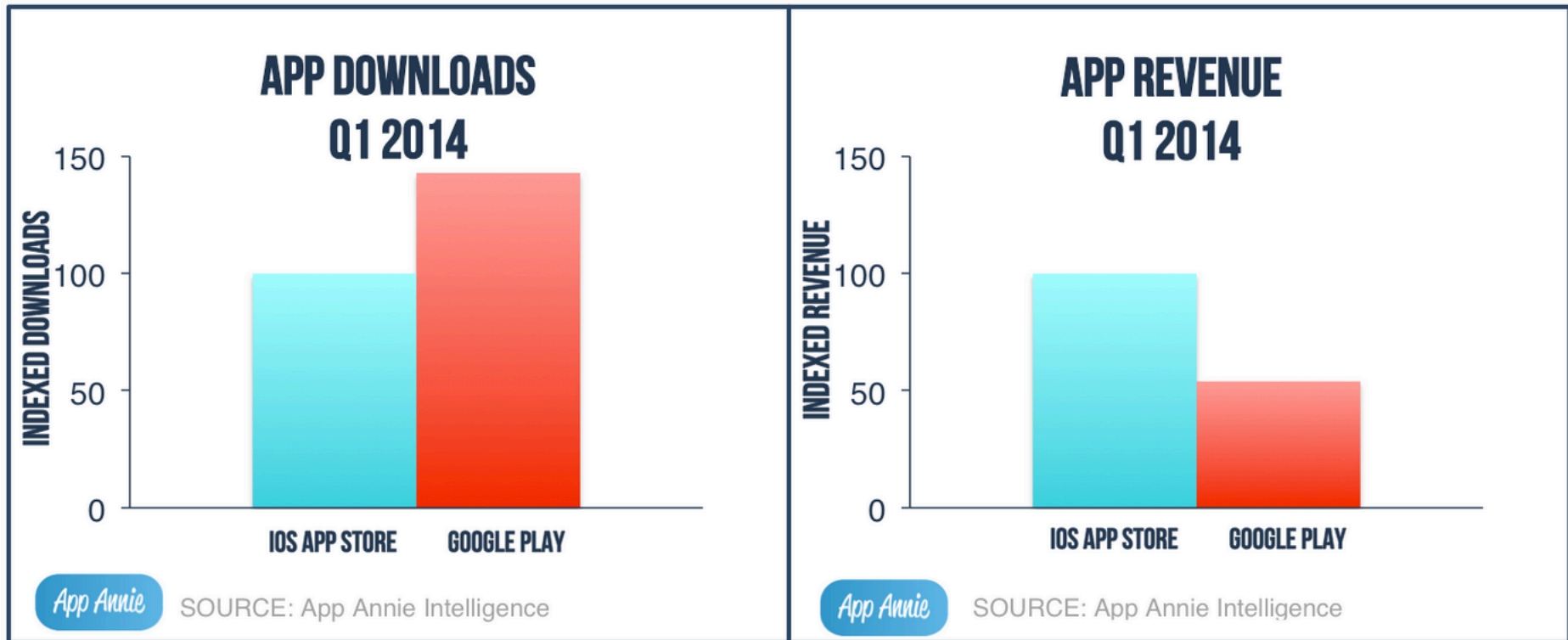
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# App Revenue and Download Trends

## iOS App Store and Google Play



- In Q1 2014, Google Play led the iOS App Store in app downloads by around 45%
- iOS maintained a strong monetization lead, generating about 85% more revenue than Google Play in Q1 2014

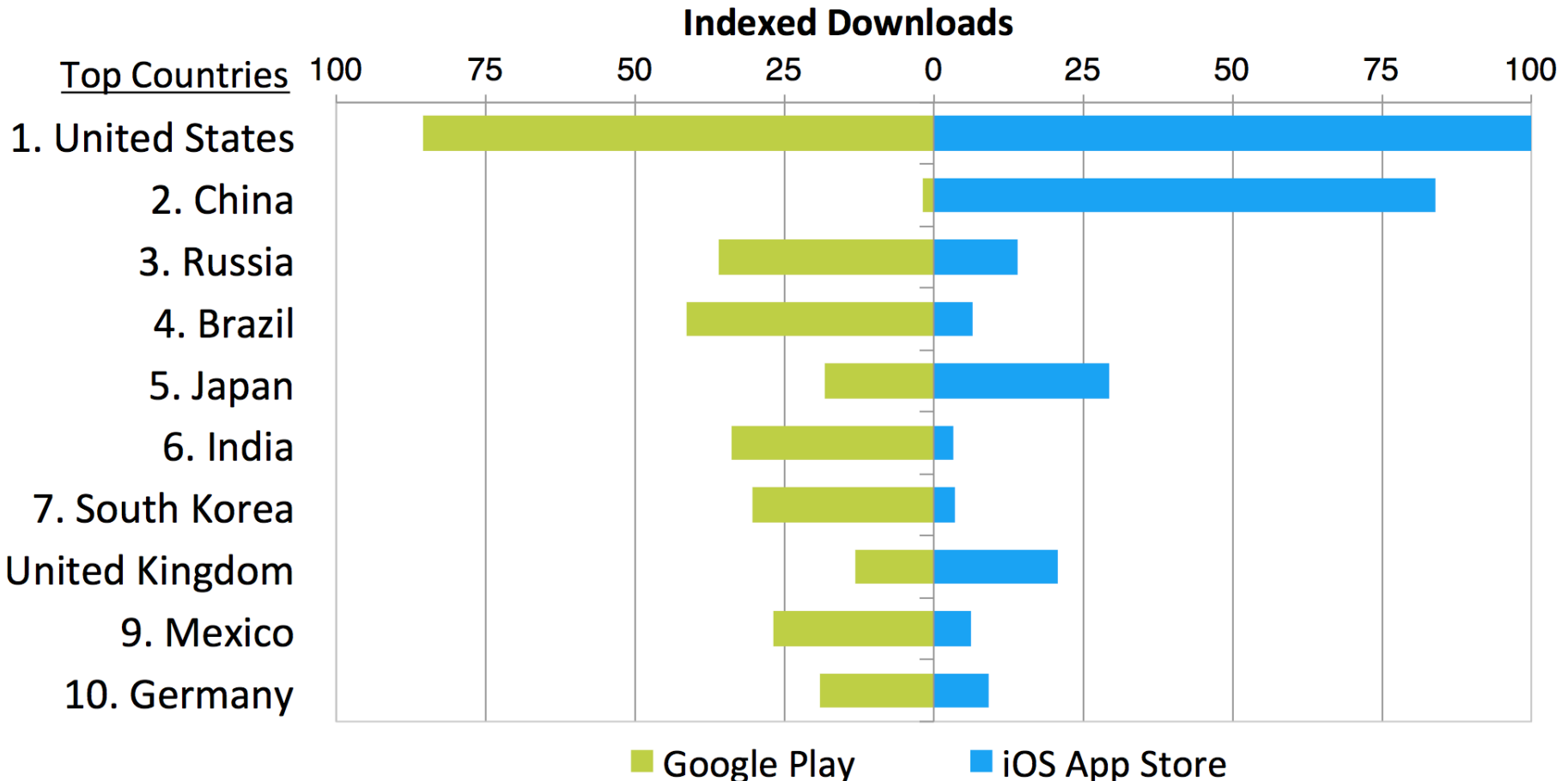


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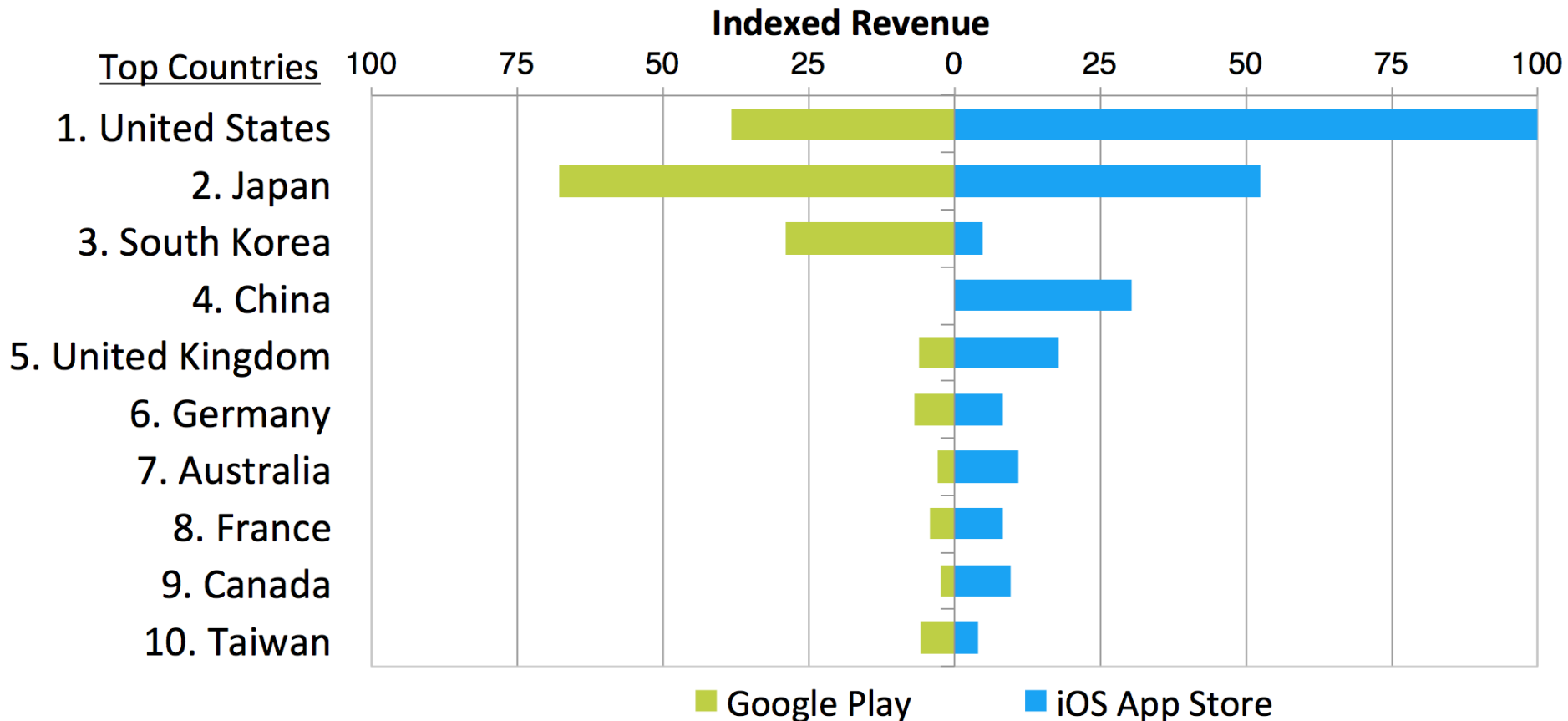


# App Store Downloads by Country, March 2014



- United States and China drove around 45% of iOS App Store downloads
- China used Android app stores extensively, but not Google Play

# App Store Revenue by Country, March 2014



- US, Japan, and Korea drove about 70% of Google Play revenue
- iOS remained the clear revenue leader in most countries, except South Korea, Japan, and Taiwan

# How are the markets shifting in the iOS App Store?

Rank Mar 2014	By Downloads		By Revenue	
	Country	Chg vs. Mar 2013	Country	Chg vs. Mar 2013
1	United States	-	United States	-
2	China	-	Japan	-
3	Japan	-	China	↑1
4	United Kingdom	-	United Kingdom	↓1
5	Russia	↑2	Australia	-
6	France	↓1	Canada	-
7	Canada	↑1	France	↑1
8	Germany	↓2	Germany	↓1
9	Australia	-	Russia	-
10	Italy	-	South Korea	-

- Russia was the emerging market in iOS App Store downloads
- China (rank #3) moved up the ranks in iOS revenue

# How are the markets shifting in Google Play?

Rank Mar 2014	By Downloads		By Revenue	
	Country	Chg vs. Mar 2013	Country	Chg vs. Mar 2013
1	United States	-	Japan	-
2	Brazil	↑5	United States	-
3	Russia	↑1	South Korea	-
4	India	↓1	Germany	↑1
5	South Korea	↓3	United Kingdom	↓1
6	Mexico	↑2	Taiwan	↑2
7	Turkey	↑8	France	-
8	Indonesia	↑8	Hong Kong	↑3
9	Germany	↓3	Australia	↓3
10	Japan	↓5	Russia	-

- Turkey, Indonesia, and Brazil were the emerging markets in Google Play downloads
- Google Play added carrier billing for Hong Kong in June 2013
- Paid apps returned to Google Play Taiwan in February 2013

# Country Highlights

## iOS App Store and Google Play, March 2014

### What is the recommended country launch strategy today?

- **Japan** and **US**: Launch across both iOS App Store and Google Play
- **China**: Launch for iOS, and use local distribution and monetization channels for Android
- **South Korea**: Develop for Google Play, rather than iOS App Store
- **Most other countries**: iOS App Store monetizes better than Google Play

### Which markets are emerging?

- **China** for iOS revenue
- **Russia** for its growth in iOS downloads
- **Turkey**, **Indonesia**, and **Brazil** for Google Play downloads
- **Taiwan** and **Hong Kong** for Google Play revenue

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# How are the categories shifting in the iOS App Store?

Rank Mar 2014	By Downloads		By Revenue	
	Country	Chg vs. Mar 2013	Country	Chg vs. Mar 2013
1	Games	-	Games	-
2	Entertainment	-	Social Networking	-
3	Photo and Video	-	Music	↑1
4	Social Networking	↑2	Education	↑1
5	Lifestyle	↓1	Entertainment	↑1
6	Utilities	↓1	News	↑2
7	Music	-	Productivity	↓4
8	Productivity	↑1	Books	↓1
9	Education	↓1	Sports	↑3
10	Travel	-	Lifestyle	↑1

- Social Networking made major gains in downloads

- Sports and News made big revenue ranking strides

# How are the categories shifting in Google Play?

Rank Mar 2014	By Downloads		By Revenue	
	Country	Chg vs. Mar 2013	Country	Chg vs. Mar 2013
1	Games	-	Games	-
2	Tools	↑1	Communication	-
3	Communication	↓1	Social	-
4	Entertainment	-	Tools	↑1
5	Social	-	Travel & Local	↓1
6	Photography	↑3	Sports	↑5
7	Personalization	↓1	Entertainment	↑1
8	Music & Audio	↓1	Productivity	↓2
9	Productivity	↓1	Music & Audio	↑3
10	Media & Video	-	Personalization	↓3

- Photography and Tools gained in download rankings
- There was much movement in the top revenue categories, with Sports and Music & Audio making notable gains

# Category Highlights

## iOS App Store and Google Play, March 2014

Across both iOS and Google Play in March 2014, we saw the following category trends compared to March 2013:

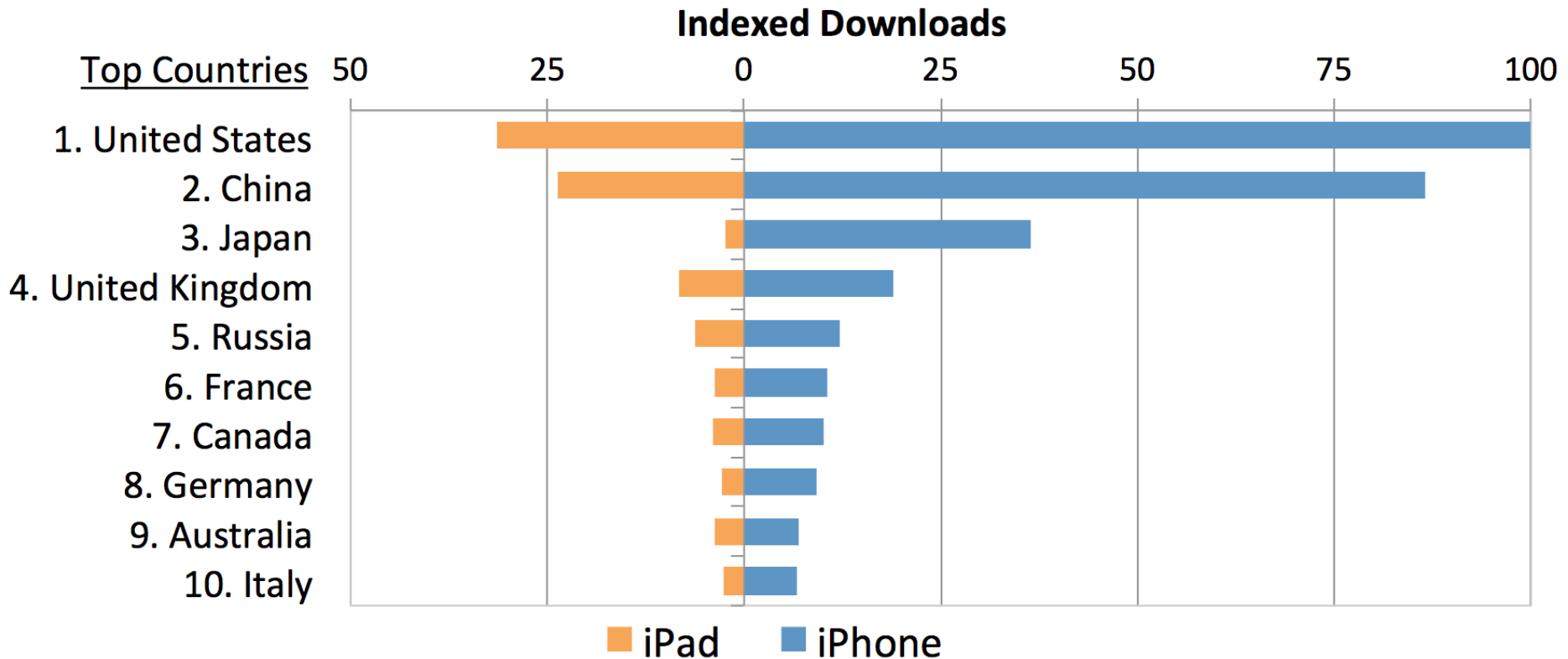
- **Games** was the flagship category of the market across iOS and Google Play, consistently leading in both downloads and revenue
- **Social Networking** moved up in the iOS download rankings
- **News** gained in the revenue rankings on the iOS App Store
- **Sports** categories gained significantly in revenue on both iOS and Google Play, largely from streaming subscription services
- **Music & Audio** made big revenue gains on Google Play
- Overall, there was a great deal of movement in the iOS and Google Play revenue rankings

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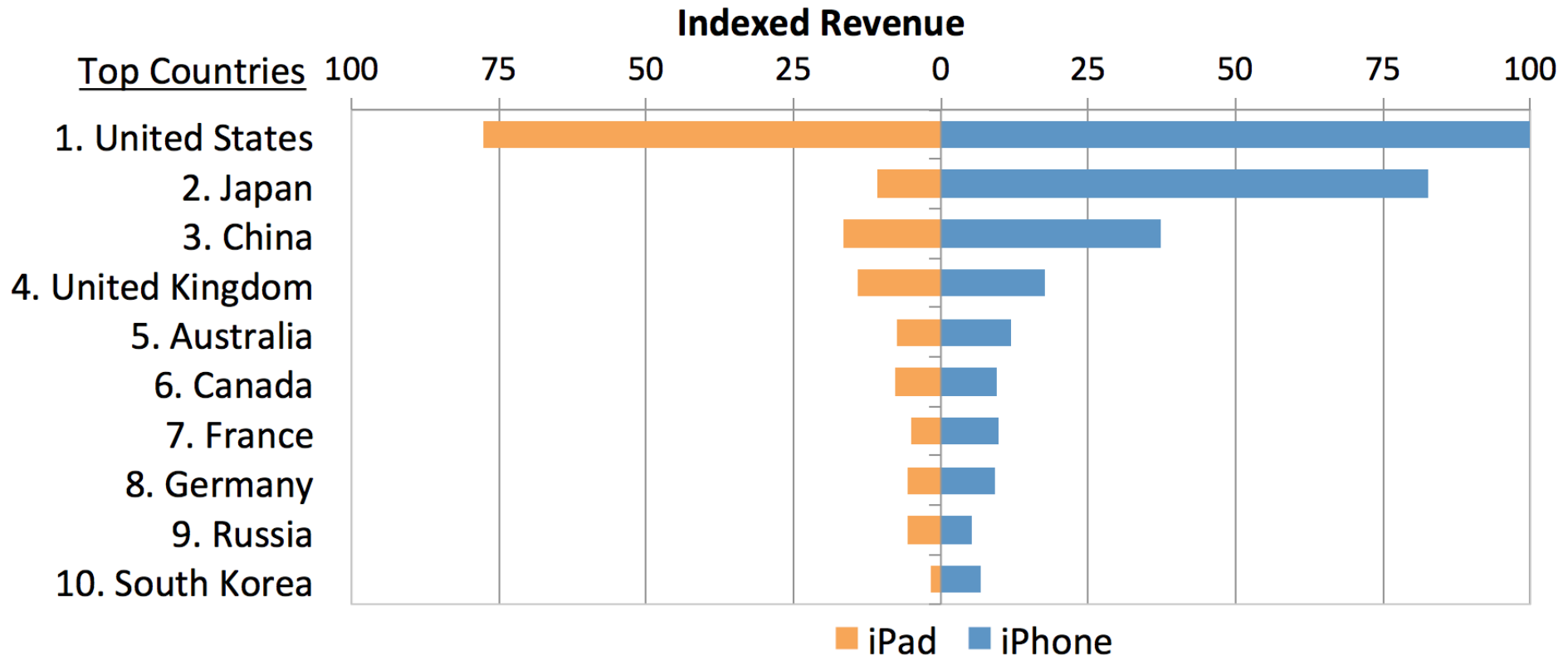


# Downloads by iOS Device, March 2014



- Around a quarter of all iOS App Store downloads were for the iPad
- Japan had minimal iPad usage in comparison with iPhone

# Revenue by iOS Device, March 2014



- iPads accounted for over one-third of iOS App Store revenue worldwide
- US drove about 35% of worldwide iPad revenue, the leading market by far
- Russia saw about 50% of its iOS revenue come via iPad

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# Top iOS App Store Publishers by March 2014 Game Downloads

	Publisher	Rank Change vs. Feb 2014	Headquarters	Total Apps (incl. non-games)
1	Tencent	▲ 3	China	157
2	Electronic Arts	-	United States	809
3	Gameloft	▲ 2	France	199
4	Mediocre	▲ 586	Sweden	8
5	King	▲ 1	United Kingdom	16
6	Glu	▲ 7	United States	77
7	Disney	-	United States	406
8	redBit	▼ 5	Italy	19
9	LINE	▲ 2	Japan	100
10	Rovio	▼ 1	Finland	37

App Annie

SOURCE: App Annie Index™

- **Tencent** hit #1 on iOS, propelled by the App Store release 雷霆战机 (*Thunder Fighter*) and WeChat release of 神魔之塔 (*Tower of Saviors*)

App Annie

# Top Google Play Publishers by March 2014 Game Downloads

	Publisher	Rank Change vs. Feb 2014	Headquarters	Total Apps (incl. non-games)
1	King	-	United Kingdom	22
2	Gameloft	-	France	87
3	Rovio	▲ 1	Finland	23
4	Electronic Arts	▲ 2	United States	147
5	LINE	▲ 3	Japan	289
6	Tiny Piece	▼ 3	China	121
7	Kiloo	▲ 2	Denmark	2
8	Outfit 7	▲ 7	Cyprus	29
9	Glu	▲ 1	United States	109
10	Disney	▲ 2	United States	151

App Annie

SOURCE: App Annie Index™

- **Outfit 7** saw a big jump with *Groove Racer*'s release, particularly in Russia
- **LINE** moved into the top 5 publishers thanks to *LINE Rangers* release

App Annie

# Top iOS App Store Publishers by March 2014 Game Revenue

	Publisher	Rank Change vs. Feb 2014	Headquarters	Total Apps (incl. non-games)
1	Supercell	-	Finland	3
2	King	-	United Kingdom	16
3	GungHo Online	-	Japan	51
4	Tencent	-	China	157
5	Electronic Arts	-	United States	809
6	Machine Zone	-	United States	11
7	GREE	-	Japan	101
8	Kabam	▲ 2	United States	16
9	Storm8	-	United States	50
10	LINE	▼ 2	Japan	100

App Annie

SOURCE: App Annie Index™

- **Kabam** saw a boost after acquiring **Phoenix Age**, incorporating *Castle Age* and *Underworld Empire* into their lineup

App Annie

# Top Google Play Publishers by March 2014 Game Revenue

	Publisher	Rank Change vs. Feb 2014	Headquarters	Total Apps (incl. non-games)
1	GungHo Online	-	Japan	35
2	King	-	United Kingdom	22
3	Supercell	-	Finland	2
4	LINE	-	Japan	289
5	CJ Group	▲ 1	South Korea	192
6	COLOPL	▼ 1	Japan	181
7	SundayToz	-	South Korea	4
8	GREE	▲ 1	Japan	134
9	Electronic Arts	▼ 1	United States	147
10	GAMEVIL	▲ 2	South Korea	222

App Annie

SOURCE: App Annie Index™

- **GAMEVIL** made the Top 10 fueled by *별이되여라!* (*Dragon Blaze*) for Kakao's success in South Korea
- **CJ Group** plans to work with **Tencent** to bring games to *WeChat*

App Annie

# Top iOS App Store Games by March 2014 Downloads

	Game	Rank Change vs. Feb 2014	Publisher	Headquarters	Subcategory
1	Smash Hit	N/A*	Mediocre	Sweden	Action, Arcade
2	Farm Heroes Saga	▲ 3	King	United Kingdom	Arcade, Puzzle
3	Flappy Wings	▲ 5	Green Chili	Germany	Action, Arcade
4	Frontline Commando 2	N/A*	Glu	United States	Action, Adventure
5	2048	N/A*	Ketchapp Studio	France	Board, Puzzle
6	Candy Crush Saga	▲ 3	King	United Kingdom	Arcade, Puzzle
7	Frozen Free Fall	▲ 2**	Disney	United States	Family, Puzzle
8	雷霆战机 (Thunder Fighter)	N/A*	Tencent	China	Strategy, Arcade
9	Unroll Me	▼ 5	Turbo Chilli	Australia	Family, Board
10	Clash of Clans	▲ 1	Supercell	Finland	Strategy, Action

App Annie

SOURCE: App Annie Index™

\* Rank change from February to March 2014 is not available as the game was released in March 2014

\*\* Rank change is approximate because of updates to unified app attribution

- *Smash Hit* lived up to its name, hitting #1 by iOS downloads
- 4 newly-released games joined the Top 10 games in March

App Annie

# Top Google Play Games by March 2014 Downloads

	Game	Rank Change vs. Feb 2014	Publisher	Headquarters	Subcategory
1	Candy Crush Saga	▲ 1	King	United Kingdom	Casual
2	Subway Surfers	▲ 1	Kiloo	Denmark	Arcade
3	Farm Heroes Saga	▲ 3	King	United Kingdom	Casual
4	Pou	▲ 1	Zakeh	Lebanon	Casual
5	My Talking Tom	▲ 4	Outfit 7	Cyprus	Casual
6	Smash Hit	N/A*	Mediocre	Sweden	Arcade
7	Temple Run 2	-	Imangi	United States	Action
8	Hill Climb Racing	-	Fingersoft	Finland	Racing
9	Clumsy Bird	▼ 5	Candy Mobile	United States	Action
10	Despicable Me	-	Gameloft	France	Casual

App Annie

SOURCE: App Annie Index™

\* Rank change from February to March 2014 is not available as the game was released in March 2014

- *My Talking Tom* performed well in Brazil and Russia to join the Top 5
- **King** published 2 of the Top 3 Google Play games by downloads

App Annie

# Top iOS App Store Games by March 2014 Revenue

	Game	Rank Change vs. Feb 2014	Publisher	Headquarters	Subcategory
1	Clash of Clans	-	Supercell	Finland	Strategy, Action
2	Candy Crush Saga	-	King	United Kingdom	Arcade, Puzzle
3	パズル&ドラゴンズ (Puzzle & Dragons)	-	GungHo Online	Japan	Puzzle, Role Playing
4	Game of War – Fire Age	-	Machine Zone	United States	Role Playing, Strategy
5	Hay Day	-	Supercell	Finland	Simulation, Family
6	Farm Heroes Saga	▲ 1	King	United Kingdom	Arcade, Puzzle
7	全民飞机大战 (Massive Plane Warz)	▲ 2	Tencent	China	Arcade, Action
8	天天飞车 (Flying Carz)	▲ 7	Tencent	China	Racing, Action
9	Pet Rescue Saga	▼ 1	King	United Kingdom	Puzzle, Arcade
10	天天酷跑 (GunZ Dash)	▼ 4	Tencent	China	Action, Adventure

App Annie

SOURCE: App Annie Index™

- **Tencent** published 3 of the Top 10 games by iOS revenue, all running on the *WeChat* gaming platform

App Annie



# Top Google Play Games by March 2014 Revenue

	App	Rank Change vs. Feb 2014	Publisher	Headquarters	Subcategory
1	パズル & ドラゴンズ (Puzzle & Dragons)	-	GungHo Online	Japan	Puzzle
2	Clash of Clans	-	Supercell	Finland	Strategy
3	Candy Crush Saga	-	King	United Kingdom	Casual
4	애니팡 (Anipang) 2	▲ 1	SundayToz	South Korea	Puzzle
5	Hay Day	▲ 3	Supercell	Finland	Family
6	Pokopang	▼ 2	LINE/NHN Entertainment	Japan/South Korea	Puzzle
7	魔法使いと黒猫のウィズ (The World of Mystic Wiz)	▼ 1	COLOPL	Japan	Role Playing
8	Farm Heroes Saga	▲ 1	King	United Kingdom	Casual
9	몬스터 길들이기 (Monster Taming) for Kakao	▼ 2	CJ Group	South Korea	Role Playing
10	Brave Frontier	▲ 1	gumi/Chukong	Japan/China	Role Playing/Action

App Annie

SOURCE: App Annie Index™

- *Brave Frontier* saw benefits from releasing 4 localized versions
- 4 of the Top 5 games by revenue are shared across iOS and Google Play

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# Top iOS App Store Publishers by March 2014 Downloads Excluding Games

	Publisher	Rank Change vs. Feb 2014	Headquarters	Total Apps (incl. games)
1	Google	-	United States	37
2	Tencent	▲ 2	China	157
3	Facebook	▼ 1	United States	14
4	Baidu	▼ 1	China	641
5	Apple	-	United States	38
6	Microsoft	▲ 2	United States	62
7	Alibaba Group	-	China	62
8	Disney	▲ 1	United States	406
9	Outfit 7	▼ 3	Cyprus	62
10	LINE	▲ 1	Japan	100

App Annie

SOURCE: App Annie Index™

- **Microsoft** made gains following the release of *Office for iPad* apps
- **Tencent** was boosted by downloads of 腾讯视频 (*Tencent Videos*) and 腾讯新闻 (*Tencent News*)

App Annie

# Top Google Play Publishers by March 2014 Downloads Excluding Games

	Publisher	Rank Change vs. Feb 2014	Headquarters	Total Apps (incl. games)
1	Facebook	-	United States	10
2	Google	-	United States	97
3	Kingsoft Internet Software*	-	China	37
4	Sungy Mobile	-	China	2613
5	Outfit 7	-	Cyprus	29
6	Microsoft	-	United States	42
7	LINE	-	Japan	289
8	Rakuten	▲ 2	Cyprus	1
9	Twitter	▲ 2	United States	5
10	Adobe	▲ 2	United States	19

App Annie

SOURCE: App Annie Index™

\* Kingsoft Internet Software changed its name to Cheetah Mobile on April 2, 2014

- **Rakuten** made gains in Brazil with a *Viber* promotion offering free calls

# Top iOS App Store Publishers by March 2014 Revenue Excluding Games

	Publisher	Rank Change vs. Feb 2014	Headquarters	Total Apps (incl. games)
1	Pandora	▲ 1	United States	1
2	LINE	▼ 1	Japan	100
3	Microsoft	▲ 3	United States	62
4	Disney	-	United States	406
5	Zoosk	-	United States	1
6	MLB	▲ 21	United States	9
7	Smule	▲ 2	United States	10
8	Apple	-	United States	38
9	Badoo	▲ 2	United Kingdom	2
10	Time Warner	▼ 3	United States	523

App Annie

SOURCE: App Annie Index™

- **MLB** jumped up the revenue ranks as US baseball season began
- *Office for iPad* apps generated a revenue boost for **Microsoft**

App Annie

# Top Google Play Publishers by March 2014 Revenue Excluding Games

	Publisher	Rank Change vs. Feb 2014	Headquarters	Total Apps (incl. games)
1	LINE	-	Japan	289
2	Sungy Mobile	-	China	2613
3	Voltage	-	Japan	64
4	Kakao	▲ 1	South Korea	16
5	Pandora	▲ 1	United States	2
6	Facebook	▼ 2	United States	10
7	Cocone	▲ 3	Japan	15
8	comiXology	-	United States	2
9	MagazineCloner	-	United Kingdom	696
10	MLB	▲ 197	United States	7

App Annie

SOURCE: App Annie Index™

- **MLB** also made significant strides on Google Play, as major US sports seasons continue to influence the rankings

App Annie

# Top iOS App Store Apps by March 2014 Downloads Excluding Games

	App	Rank Change vs. Feb 2014	Publisher	Headquarters	Category
1	YouTube	▲ 1	Google	United States	Photo and Video
2	Facebook	▲ 1	Facebook	United States	Social Networking
3	Google Maps	▲ 2	Google	United States	Navigation
4	Instagram	▲ 4	Facebook	United States	Photo and Video
5	WhatsApp Messenger	▼ 4	Facebook	United States	Social Networking
6	Facebook Messenger	▼ 2	Facebook	United States	Social Networking
7	Snapchat	▲ 2	Snapchat	United States	Photo and Video
8	LINE	▲ 2	LINE	Japan	Social Networking
9	Skype	▼ 2	Microsoft	United States	Social Networking
10	滴滴打车 (Didi Dache)	▲ 6	小桔科技 (Xiaoju Technology)	China	Travel

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SOURCE: App Annie Index™

- Taxi-booking app 滴滴打车 (*Didi Dache*) benefited from *WeChat* integration and fare promotions
- *LINE* made gains in the US, coinciding with a marketing campaign

App Annie



# Top Google Play Apps by March 2014 Downloads Excluding Games

	App	Rank Change vs. Feb 2014	Publisher	Headquarters	Category
1	Facebook	-	Facebook	United States	Social
2	WhatsApp Messenger	-	Facebook	United States	Communication
3	Facebook Messenger	-	Facebook	United States	Communication
4	Clean Master	-	Kingsoft Internet Software*	China	Tools
5	Instagram	▲ 1	Facebook	United States	Social
6	Skype	▼ 1	Microsoft	United States	Communication
7	Viber	▲ 1	Rakuten	Japan	Communication
8	LINE	▼ 1	LINE	Japan	Communication
9	Clean Master Security	▲ 16	Kingsoft Internet Software*	China	Tools/Productivity
10	Twitter	▼ 1	Twitter	United States	Social

App Annie

SOURCE: App Annie Index™

\* Kingsoft Internet Software changed its name to Cheetah Mobile on April 2, 2014

- *Clean Master Security* performed strongly in the United States, Mexico and Brazil

App Annie

# Top iOS App Store Apps by March 2014 Revenue Excluding Games

	App	Rank Change vs. Feb 2014	Publisher	Headquarters	Category
1	Pandora Radio	-	Pandora	United States	Music
2	LINE	-	LINE	Japan	Social Networking
3	Zoosk	▲ 1	Zoosk	United States	Social Networking
4	MLB.com At Bat	▲ 9	MLB	United States	Sports
5	Skype	-	Microsoft	United States	Social Networking
6	LINE PLAY	-	LINE	Japan	Social Networking
7	Badoo	-	Badoo	United Kingdom	Social Networking
8	Comics	-	comiXology	United States	Books
9	TurboTax 2013	▼ 6	Intuit	United States	Finance
10	Deezer	▲ 2	Deezer	France	Music

App Annie

SOURCE: App Annie Index™

- *MLB.com At Bat* monetized with monthly and annual subscriptions
- *Deezer* grew revenue further in France, Brazil and Mexico

App Annie

# Top Google Play Apps by March 2014 Revenue Excluding Games

	App	Rank Change vs. Feb 2014	Publisher	Headquarters	Category
1	LINE	-	LINE	Japan	Communication
2	LINE PLAY	-	LINE	Japan	Social
3	LINE Manga	▲ 1	LINE	Japan	Comics
4	KakaoTalk	▲ 1	Kakao	South Korea	Communication
5	Pandora Radio	▲ 1	Pandora	United States	Music & Audio
6	WhatsApp Messenger	▼ 3	Facebook	United States	Communication
7	LINE Fortune-telling	-	LINE	Japan	Entertainment
8	ポケットコロニー (PocketColony)	▲ 1	Cocone	Japan	Social
9	Comics	▲ 1	comiXology	United States	Comics
10	MLB.com At Bat	▲500+	MLB	United States	Sports

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SOURCE: App Annie Index™

- Comics publisher **comiXology** was acquired by **Amazon** after performing strongly throughout the last year

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# Top Games Publishers in Japan by Combined iOS and Google Play Performance, March 2014

Rank Mar 2014	By Downloads		By Revenue	
	Publisher	Headquarters	Publisher	Headquarters
1	LINE	Japan	GungHo Online	Japan
2	BANDAI NAMCO	Japan	LINE	Japan
3	DeNA	Japan	COLOPL	Japan
4	CyberAgent	Japan	BANDAI NAMCO	Japan
5	GungHo Online	Japan	SEGA	Japan
6	COLOPL	Japan	CyberAgent	Japan
7	SEGA	Japan	Mixi	Japan
8	SQUARE ENIX	Japan	SQUARE ENIX	Japan
9	Konami	Japan	GREE	Japan
10	Mediocre	Sweden	KLab	Japan

- **Mediocre** was the only publisher from outside Japan to make the Top 10 in March, thanks to downloads of *Smash Hit*
- **Mixi** continue to gain in game revenue ranks with モンスターストライク

# Top Publishers in Japan Outside of Games by Combined iOS and Google Play Performance, March 2014

Rank Mar 2014	By Downloads		By Revenue	
	Publisher	Headquarters	Publisher	Headquarters
1	Yahoo Japan	Japan	LINE	Japan
2	LINE	Japan	Voltage	Japan
3	Google	United States	Cocone	Japan
4	Recruit	Japan	Mixi	Japan
5	Facebook	United States	Shueisha	Japan
6	DeNA	Japan	SQUARE ENIX	Japan
7	KDDI	Japan	COLOPL	Japan
8	App Bank	Japan	Kinokuniya	Japan
9	Twitter	United States	DWANGO	Japan
10	Rakuten	Japan	GREE	Japan

- **LINE**'s performance in games and outside of games made it to dominant publisher by overall downloads in Japan
- **SQUARE ENIX** performed well in revenue outside of games with ドラゴンクエストX 冒険者のおでかけ便利ツール

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