The Global Mobile Report

comScore's cross-market comparison of mobile trends and behaviours

comScore

Introduction

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Earlier in 2017, our Mobile's Hierarchy of Needs report highlighted some key consumer behaviours on mobile devices that align with the human needs established in Maslow's famous paper.

With the addition of new markets, this report expands on those findings to provide a global snapshot of the mobile ecosystem. In The Global Mobile Report, comScore mobile and multi-platform data to highlight demographics, content categories and brands that are shaping the digital landscape.

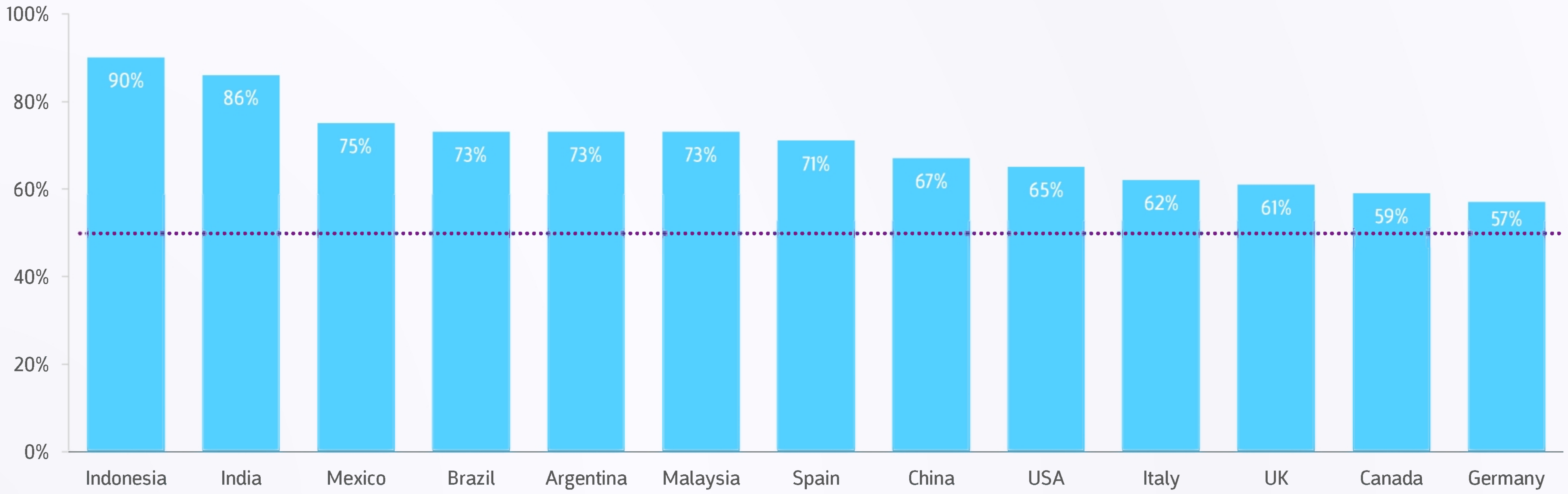
We examine audiences that are driving 'mobile only' digital consumption, which categories are more 'mobile first', and the state of global app consumption, identifying actionable sweetspots for publishers, advertisers and digital businesses.

Global Mobile Overview

Mobile has established primary position around the globe

Mobile accounts for over half of all digital minutes in 13 markets, and over 75% in Mexico, India and Indonesia

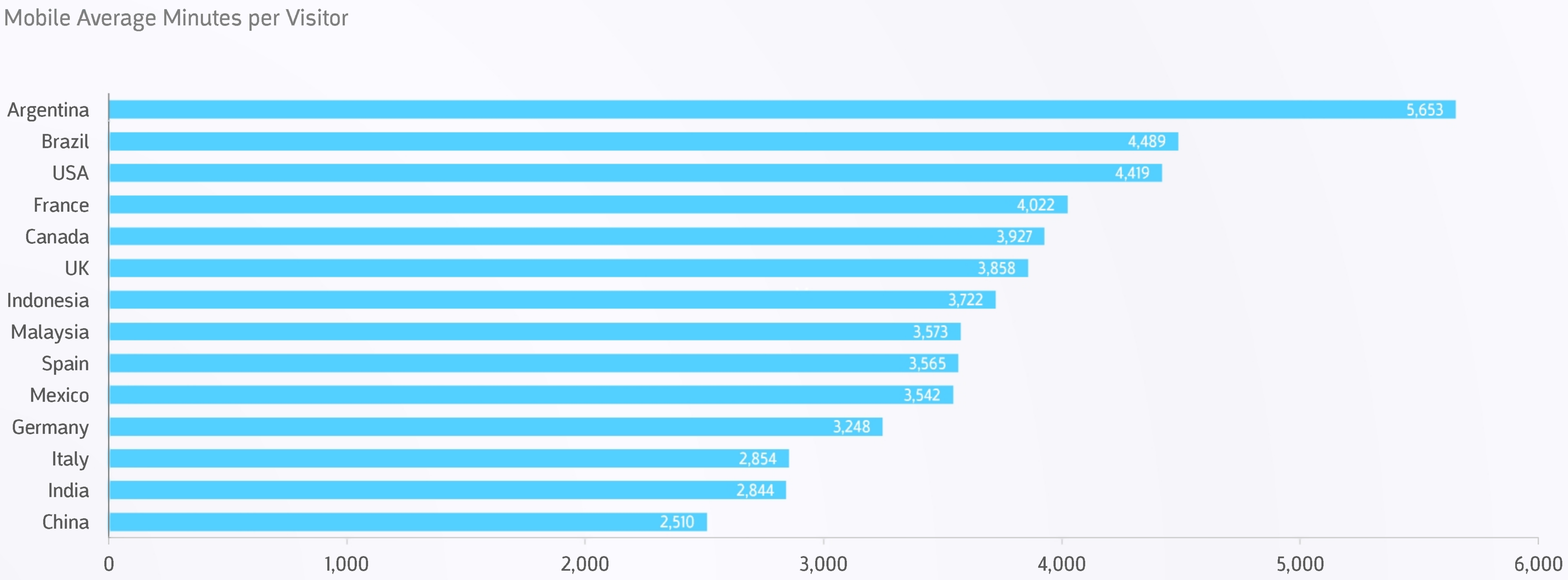
Mobile Percentage of Total Digital Minutes



Source: comScore Mobile Metrix, May 2017

Argentina leads the world in per-person mobile minutes

Latin American markets top the world in terms of average mobile minutes per visitor

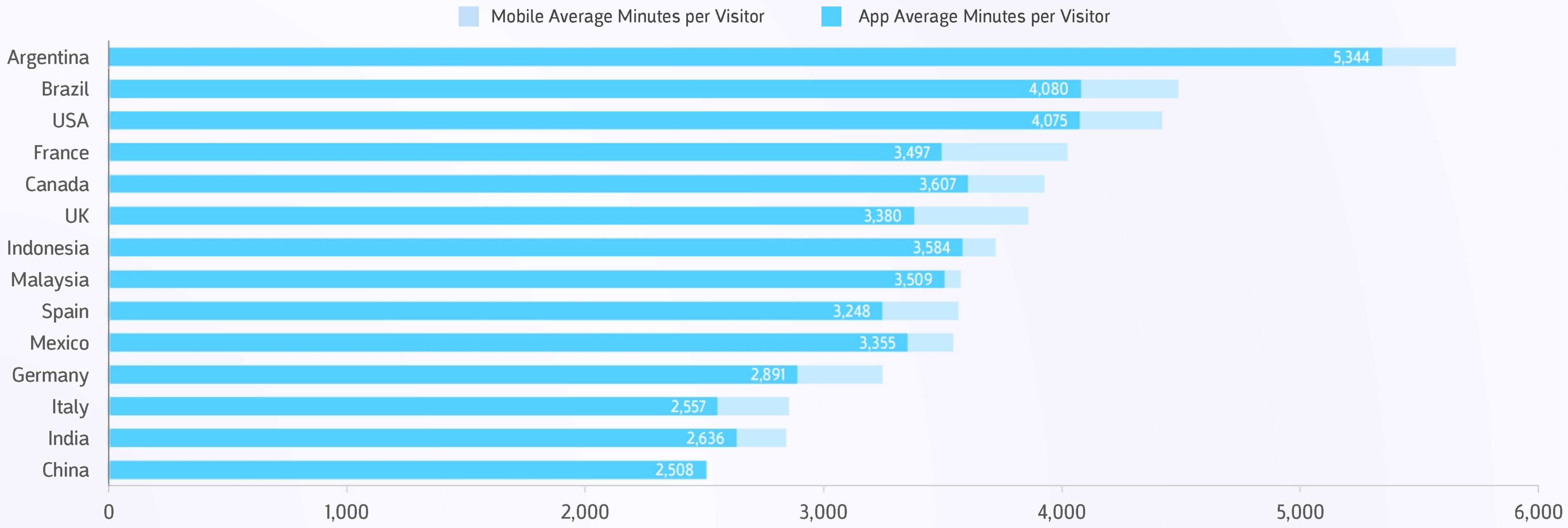


Source: comScore Mobile Metrix, May 2017

App time is universally a larger contributor than mobile web

The refined user experience and functionality of apps has led to their dominance of mobile time

App Average Minutes per Visitor

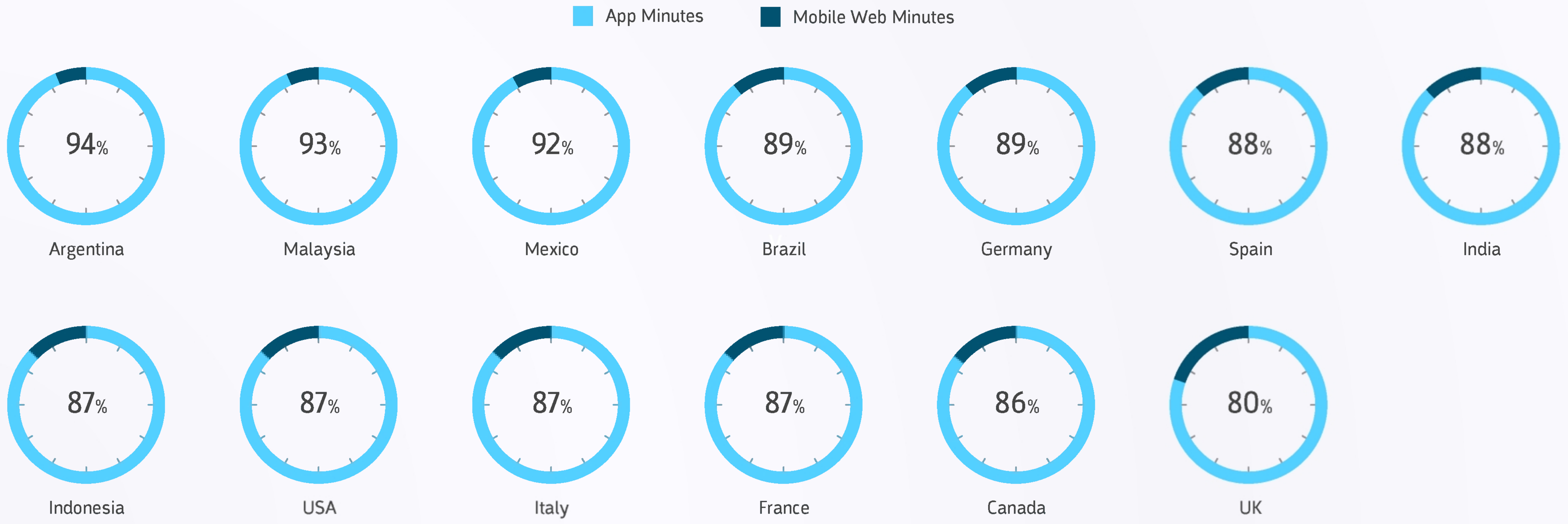


Source: comScore Mobile Metrix, May 2017

Apps drive dominant share of mobile time in all markets

More than 80% of mobile minutes in all markets are spent on apps

Share of Mobile Minutes for Apps / Mobile Web

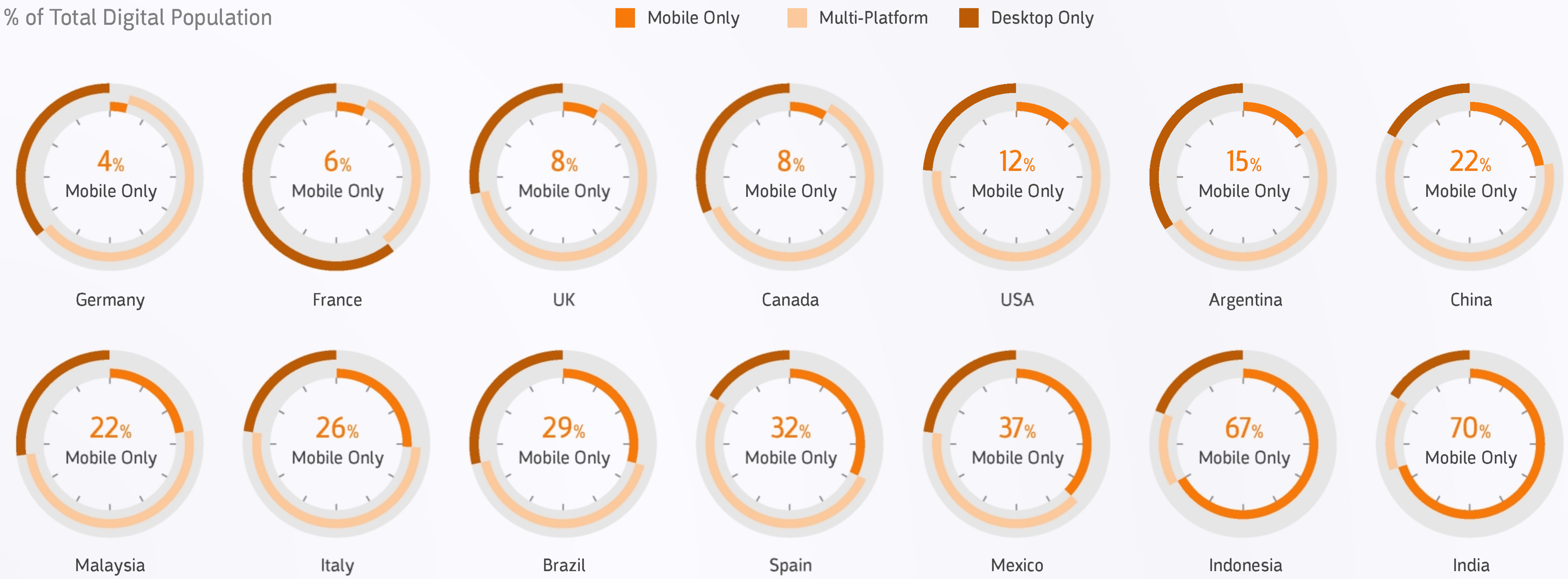


Source: comScore Mobile Metrix, May 2017

Mobile Only Audiences

More than ¼ of global users measured are now mobile only

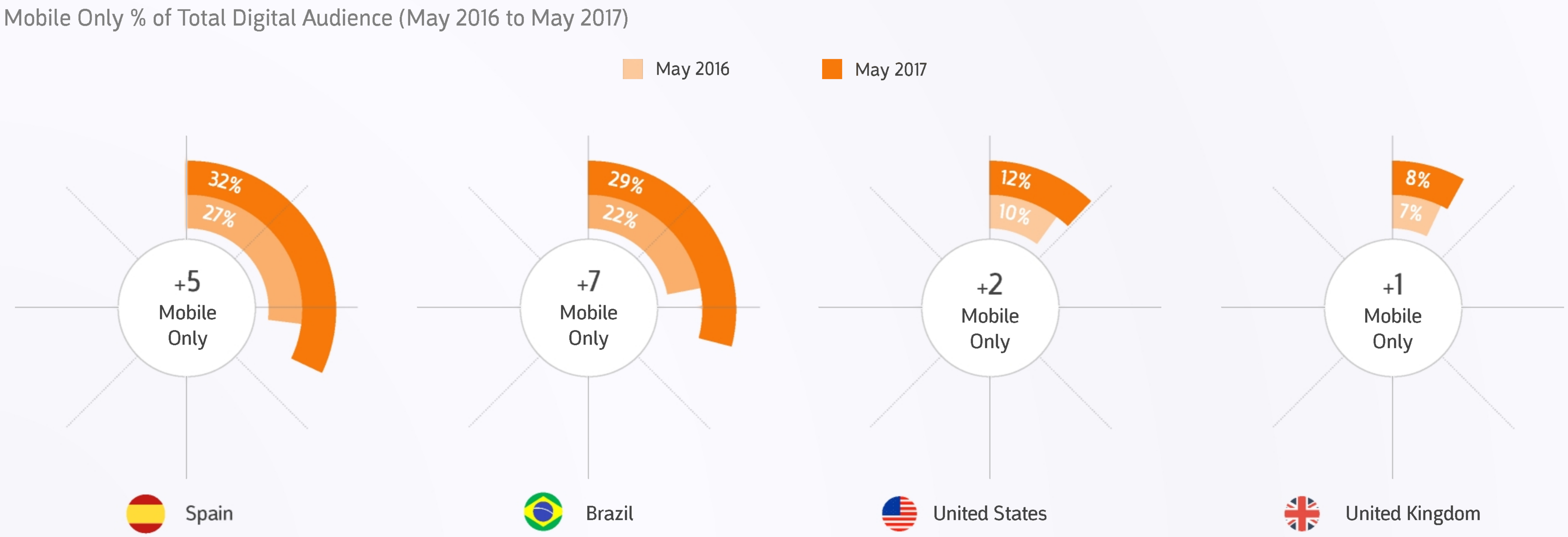
In all but 3 markets, 70%+ of users are active on mobile during the month. In India 70% use ONLY mobile



Source: comScore MMX Multi-Platform, May 2017

'Mobile only' share of total digital audience is growing

Brazil and Spain increased an already high share of mobile only users, but all markets saw this segment grow

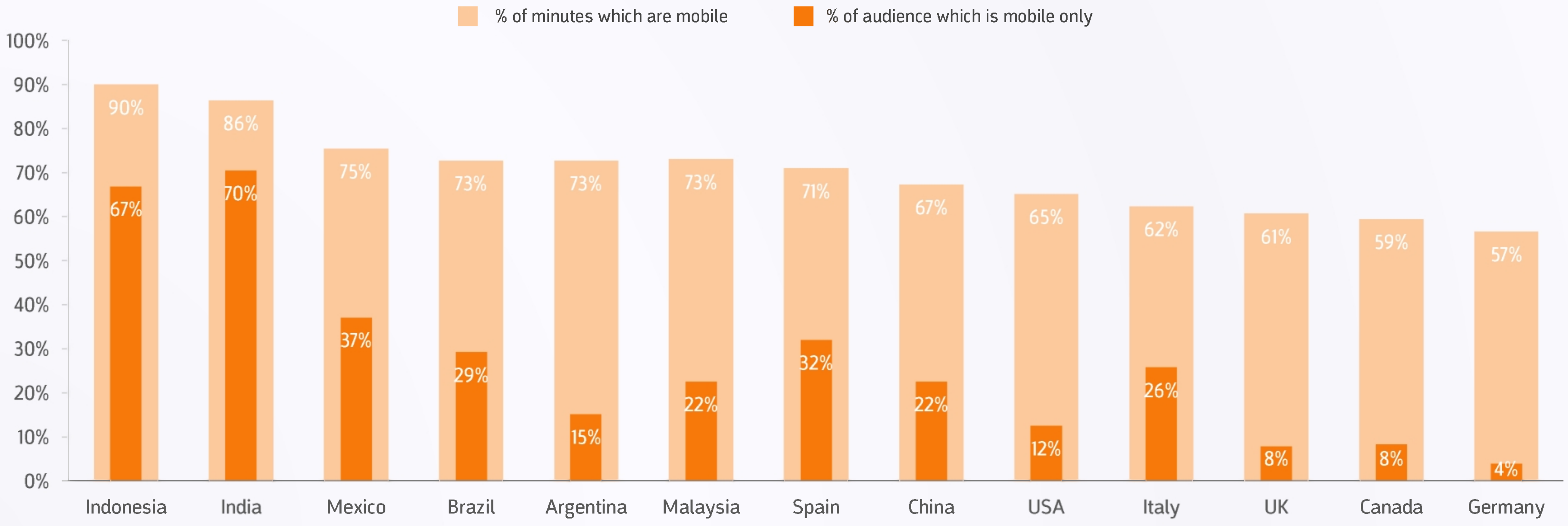


Source: comScore MMX Multi-Platform, May 2017

Mobile only usage correlates strongly with mobile time

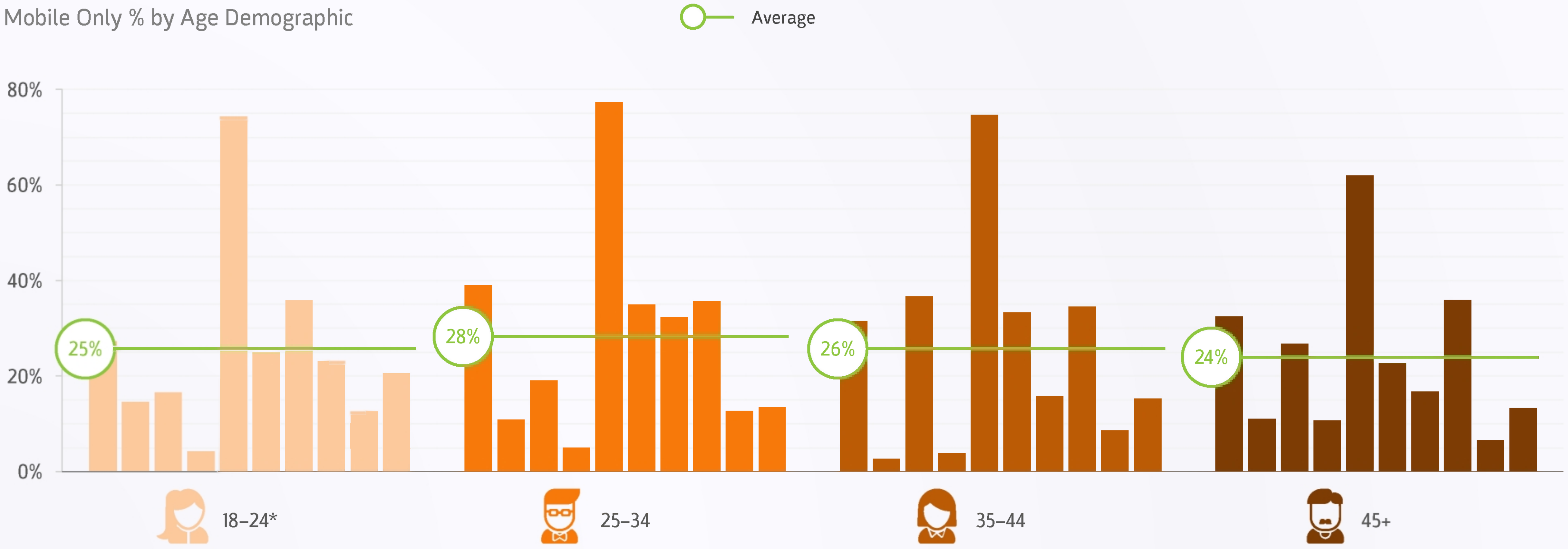
Even as a minority, larger mobile only audiences intensify the overall share of the platform in their market

Mobile Only Audiences vs. Mobile's Percentage of Total Digital Minutes



Mobile only usage not restricted to demographic extremes

Despite high mobile minutes, younger and older demographics are less likely to abandon desktop altogether



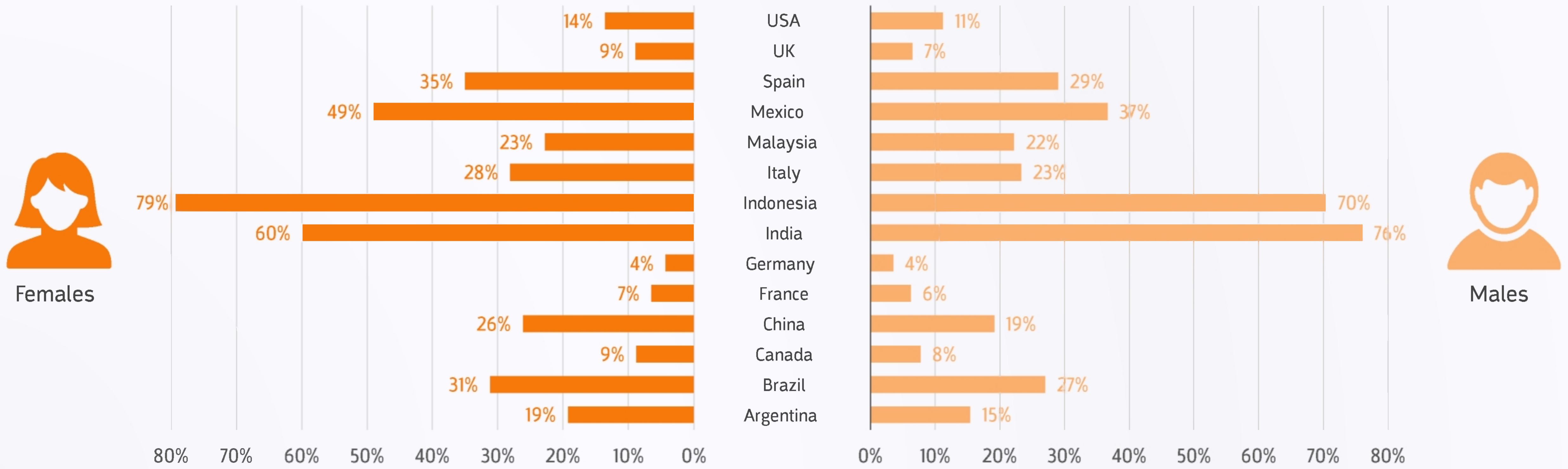
Bars shown in order: Brazil, Canada, China, France, India, Italy, Malaysia, Spain, UK, USA

Source: comScore MMX Multi-Platform, May 2017 | *Ages 15–24 in Brazil, China, India, Italy, Malaysia, Spain & UK

Females are more likely to be mobile only internet users

India was the only market where male users were more likely to be mobile only

Mobile Only % by Gender

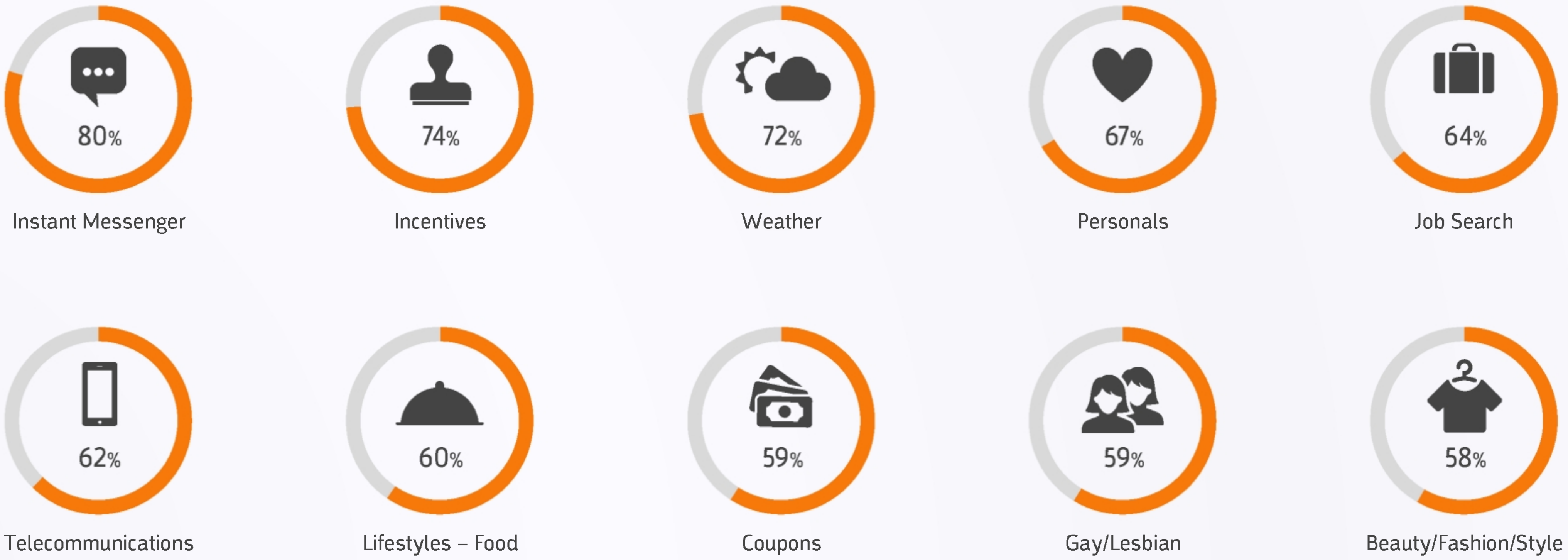


Source: comScore MMX Multi-Platform, May 2017

Certain content categories are driven by mobile only usage

On-the-go categories like communications and weather most likely to skew toward mobile only

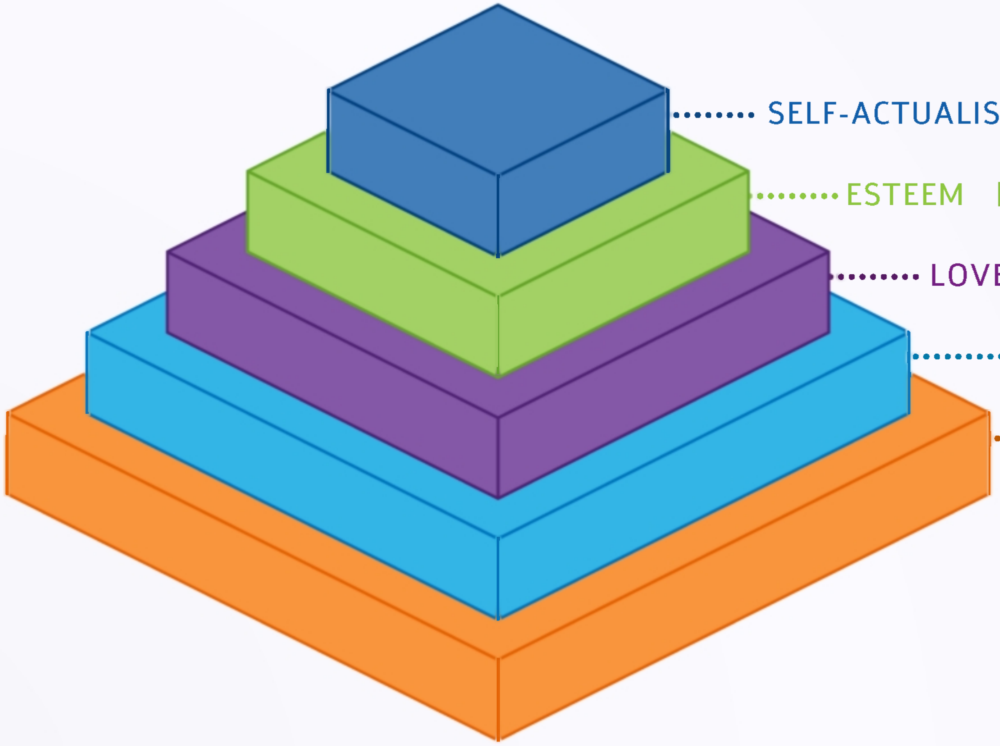
Average Mobile Only % of Total Digital Audience Across 14 Markets



Source: comScore Mobile Metrix, May 2017

‘Mobile first’ categories and human need states

Highlighted in a 2017 comScore study, mobile first behaviours can be aligned with human needs



SELF-ACTUALISATION | Travel

ESTEEM | Newspapers, Social networking

LOVE / BELONGING | Personals, Instant Messaging

SAFETY | Banking, Weather, Career services

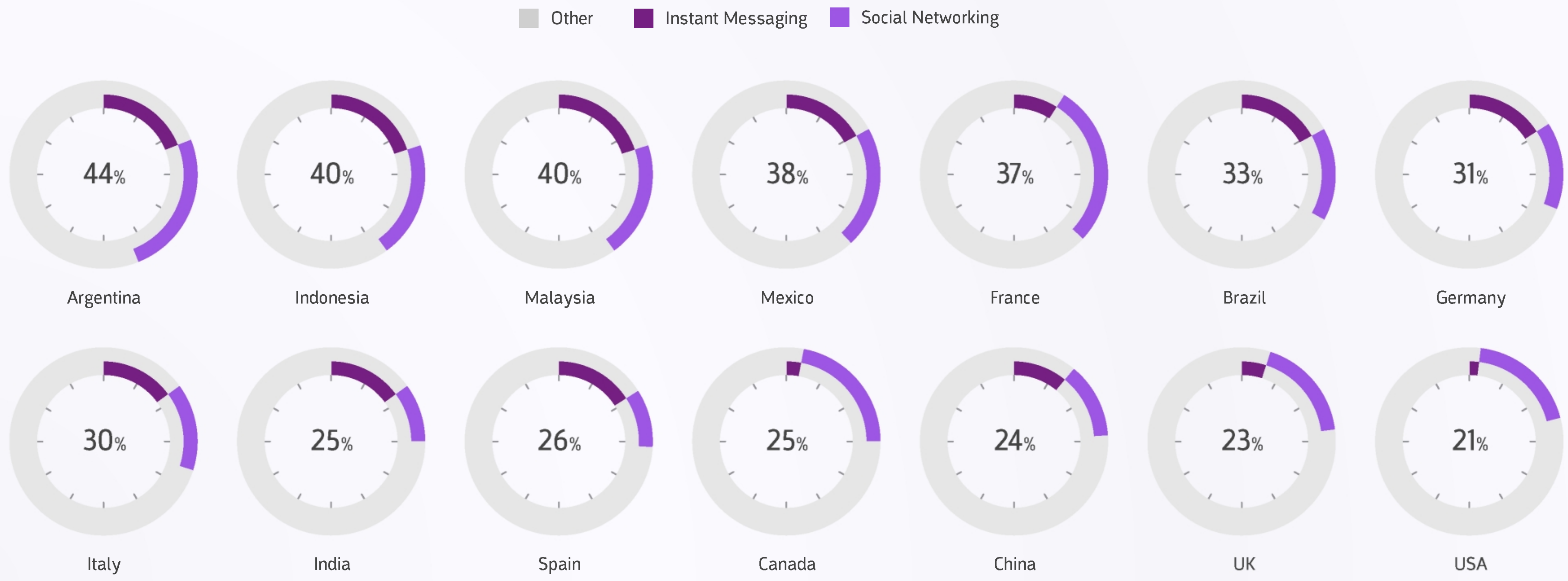
PHYSIOLOGICAL | Health, Weather, Apparel, Retail - food, Real estate

Download Mobile’s Hierarchy of Needs for more information

Mobile Category Dynamics

More than ¼ of mobile minutes on socially-driven functions

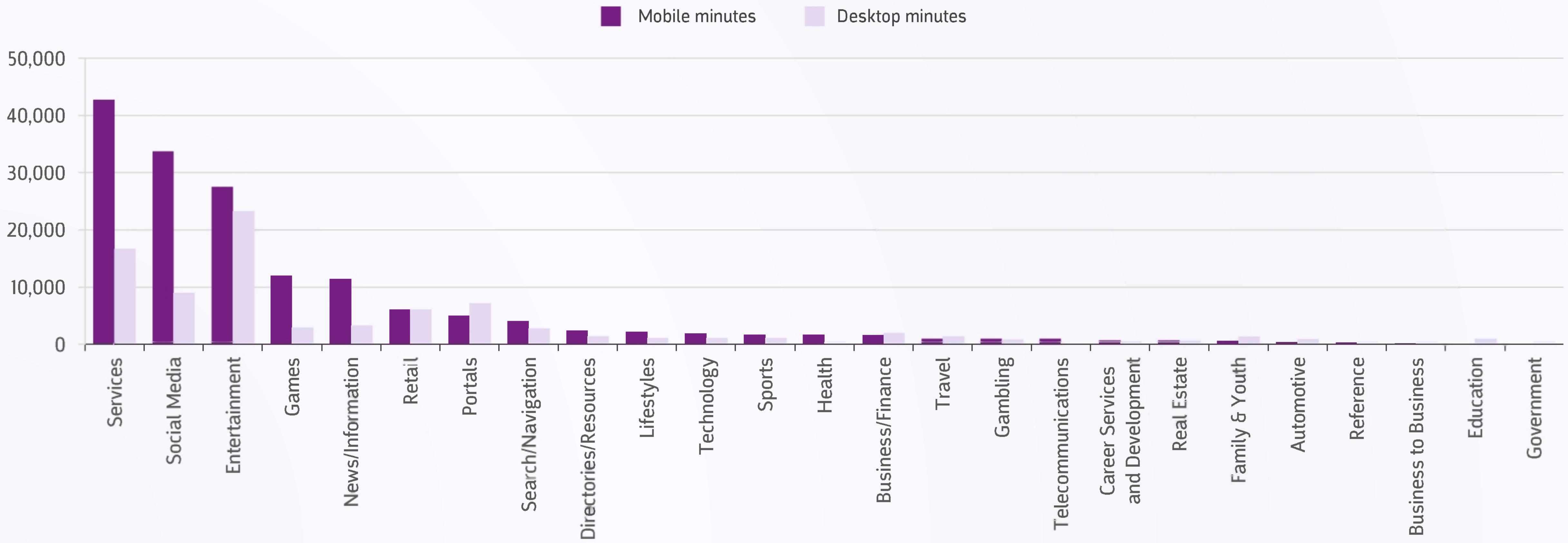
Social networking and instant messengers are consistently among the most popular mobile behaviours



Overall mobile share is driven by highly mobile categories

Services (including instant messaging), entertainment and social drive up overall share of mobile minutes

UK Total Minutes (MM) by Category / Platform

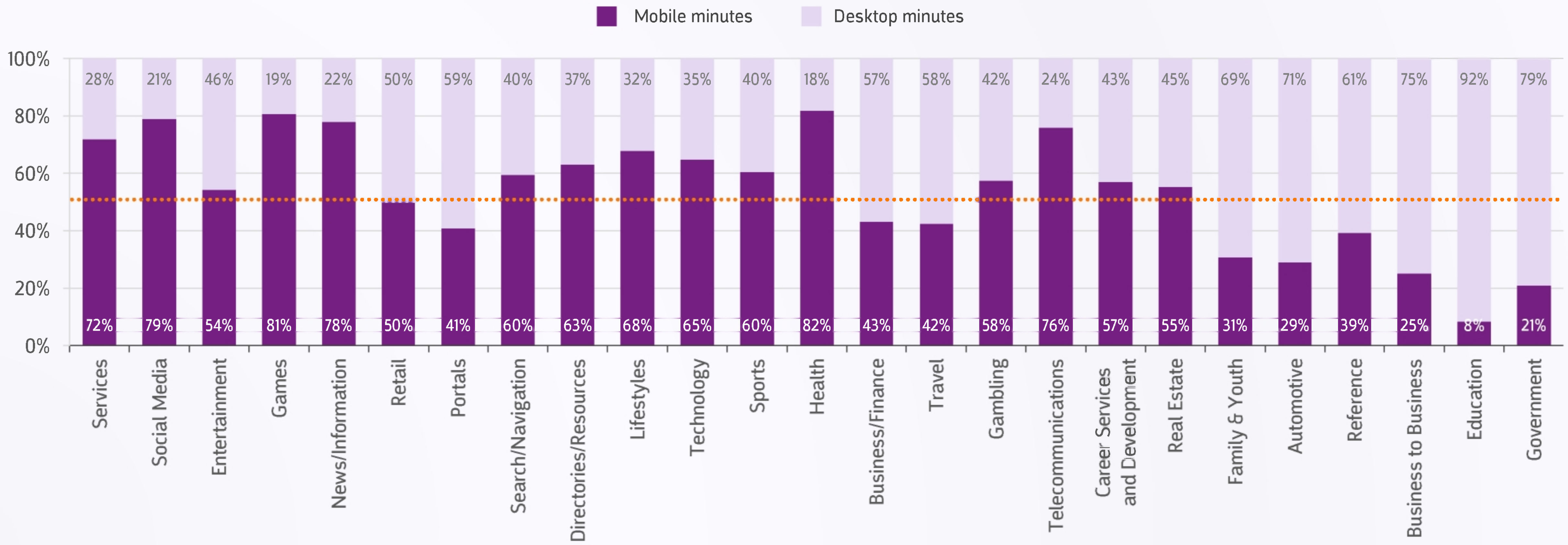


Source: comScore MMX Multi-Platform, May 2017

The longer tail of categories still relies heavily on desktop

Beyond categories delivering large absolute volumes of mobile minutes, desktop share is often over 50%

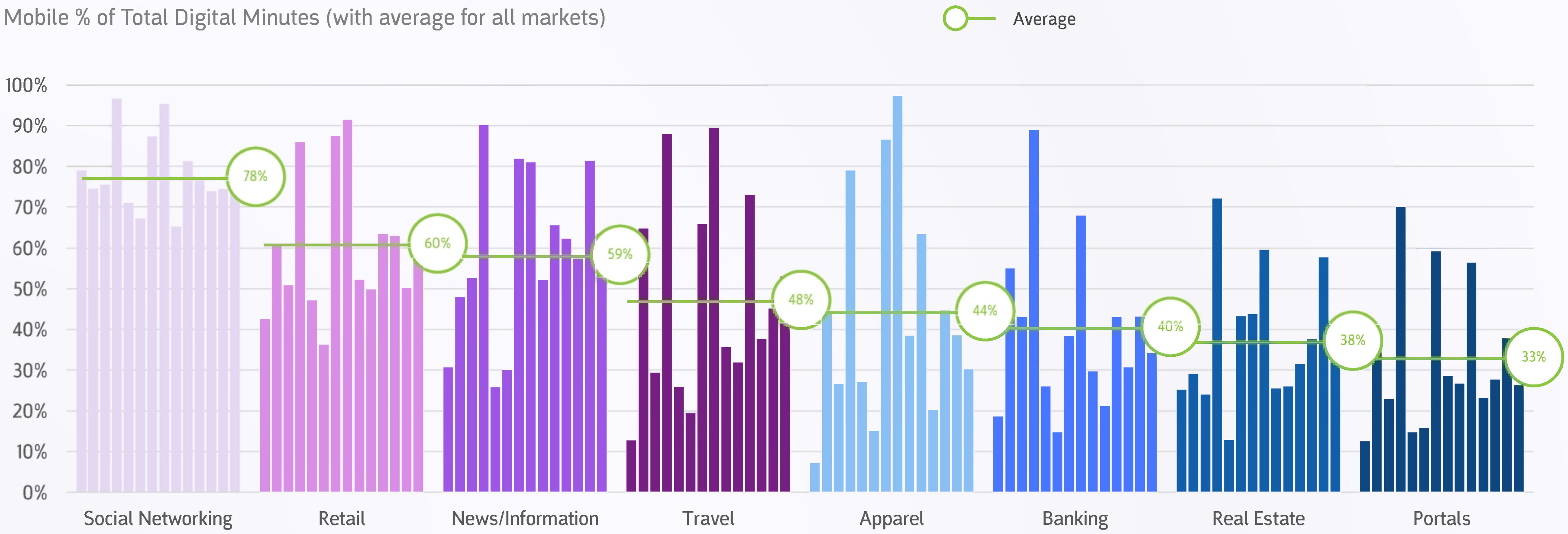
Share of UK Total Minutes (MM) by Category / Platform



Source: comScore MMX Multi-Platform, May 2017

Cross-market averages identify 'mobile first' categories

Mobile takes a large share of overall digital minutes, but category nuances are important to understand



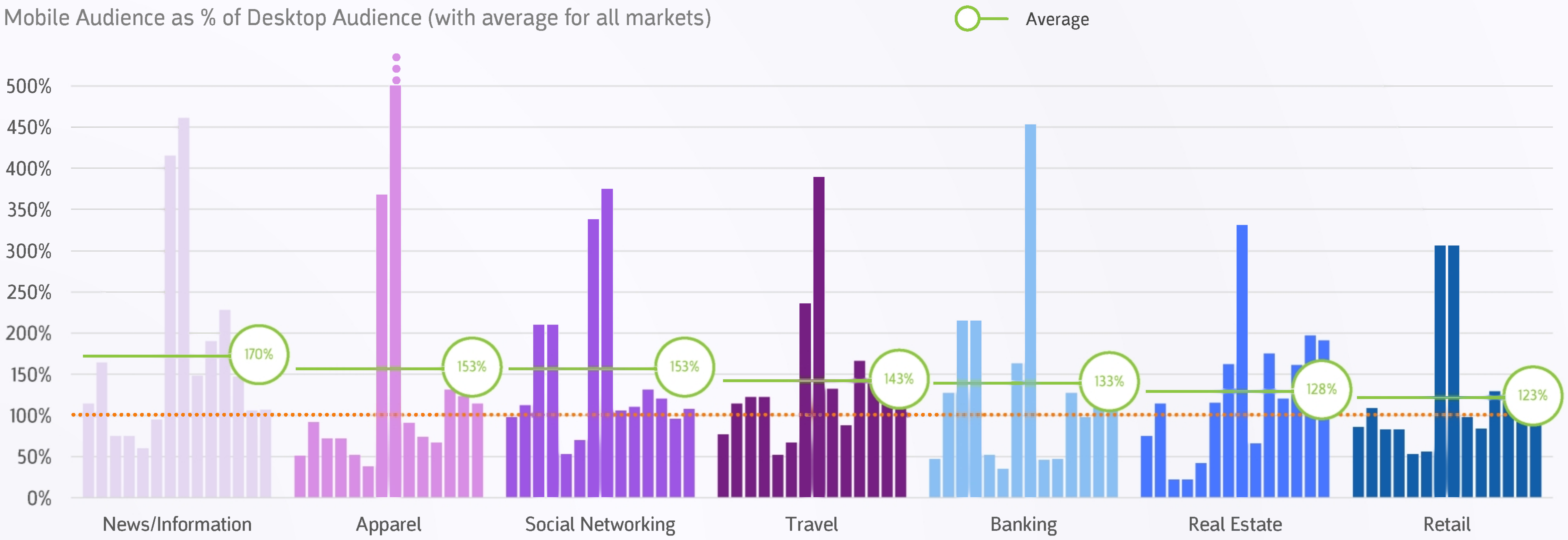
Bars shown in alphabetical order: Argentina, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Malaysia, Mexico, Spain, UK, USA

Source: comScore MMX Multi-Platform, May 2017

Some category audiences are also surpassing desktop

In a number of major categories, mobile audiences are now larger on average than their desktop counterparts

Mobile Audience as % of Desktop Audience (with average for all markets)

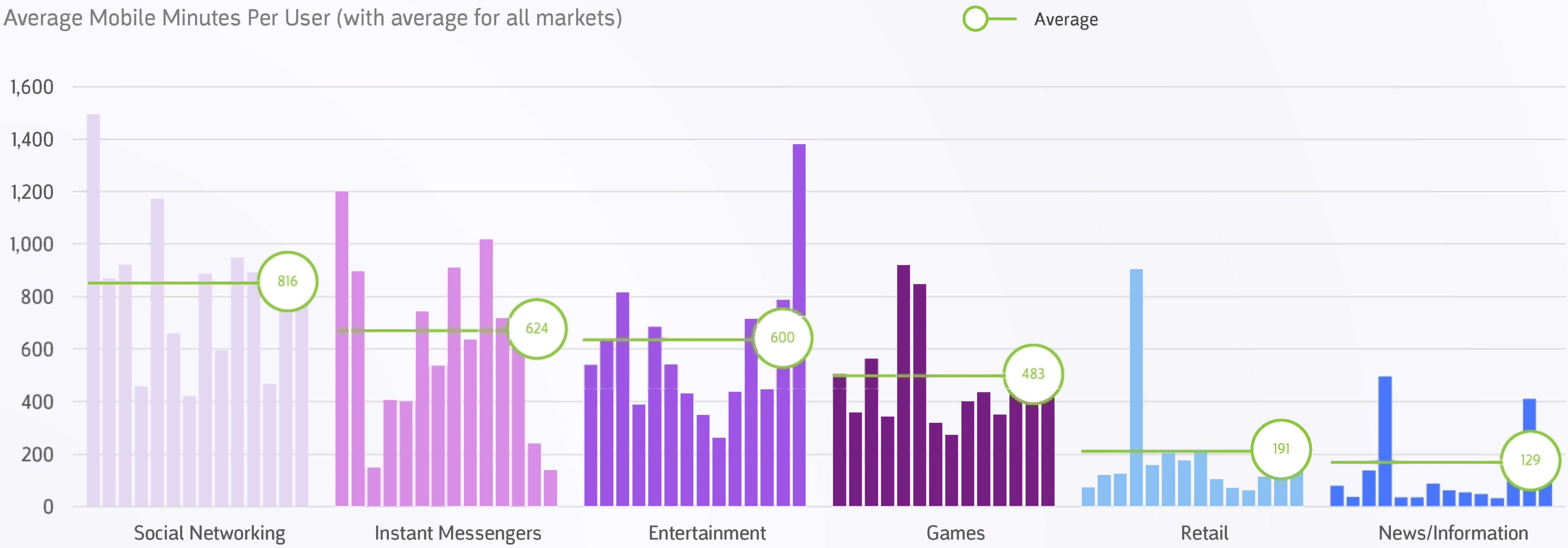


Bars shown in alphabetical order: Argentina, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Malaysia, Mexico, Spain, UK, USA

Source: comScore MMX Multi-Platform, May 2017

Social / leisure categories draw most mobile time per user

On a per-user basis, users spend more time on communication and entertainment than practical uses

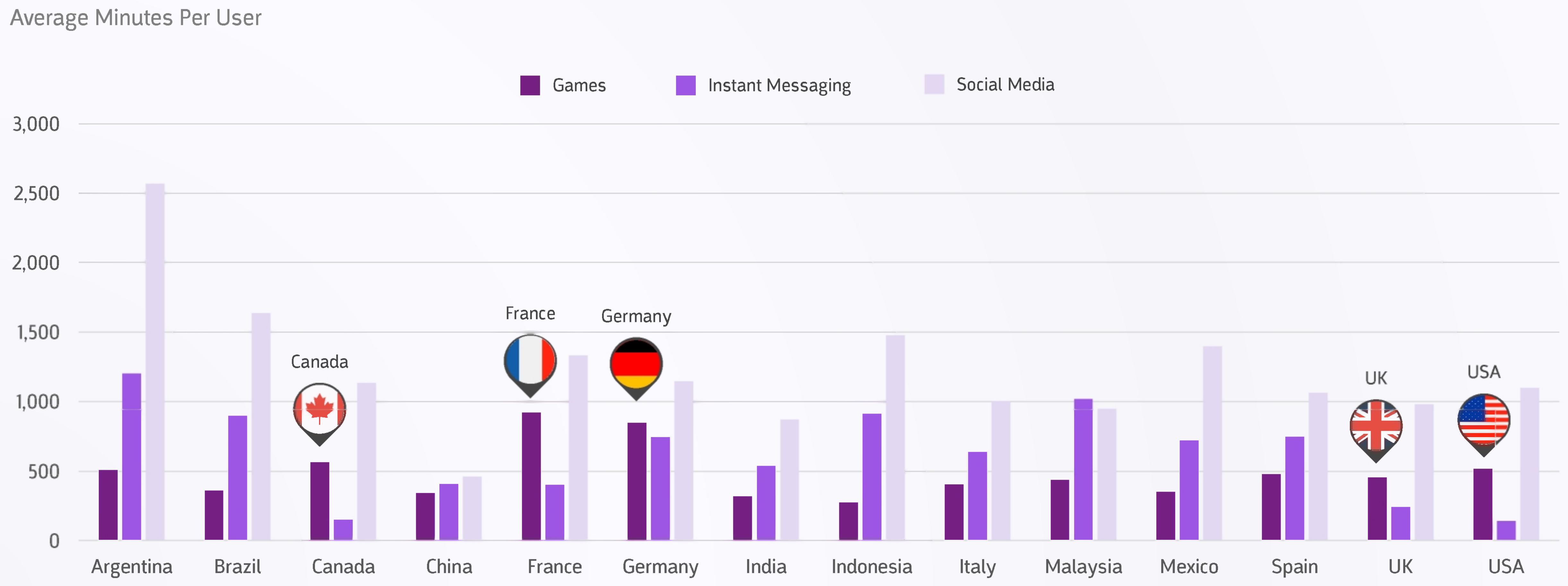


Bars shown in alphabetical order: Argentina, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Malaysia, Mexico, Spain, UK, USA

Source: comScore MMX Multi-Platform, May 2017

Games flourish in North America and Western Europe

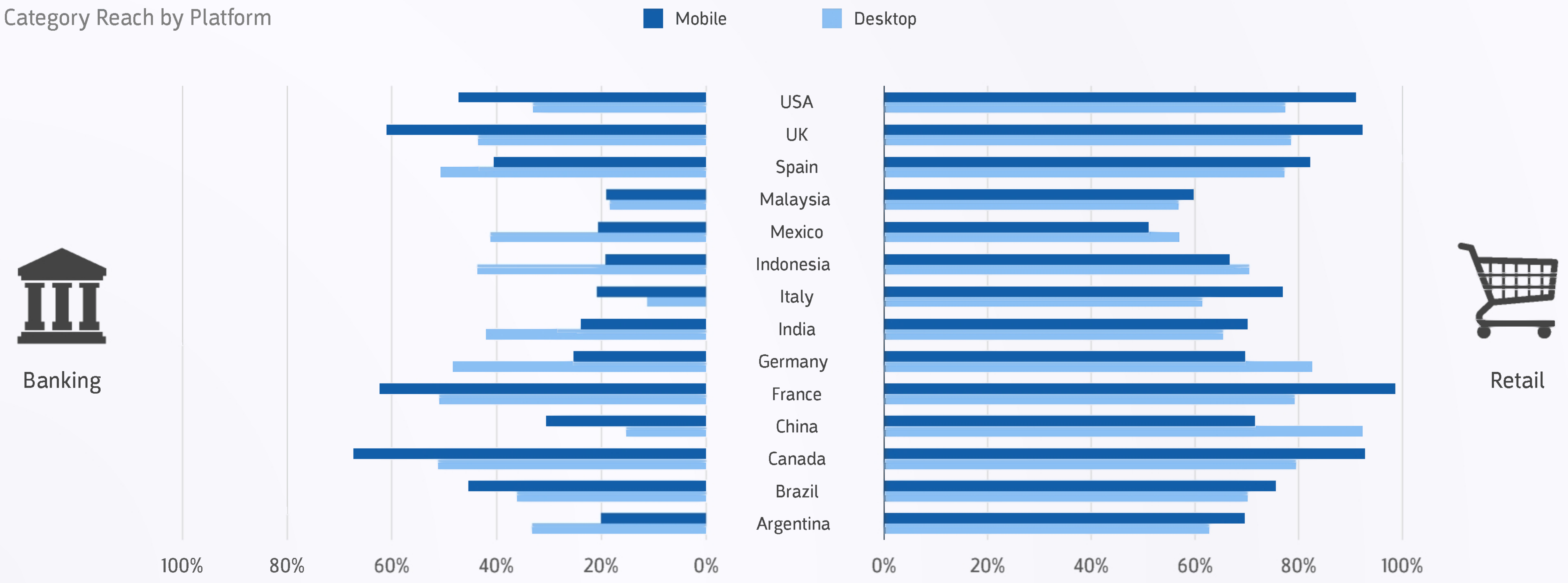
In several markets, gaming accounts for more minutes per user than even the instant messaging category



M-commerce and mobile transactions

Mobile banking / retail reach achieves relative parity with desktop

Mobile adoption for the banking and retail categories now almost mirrors desktop equivalents

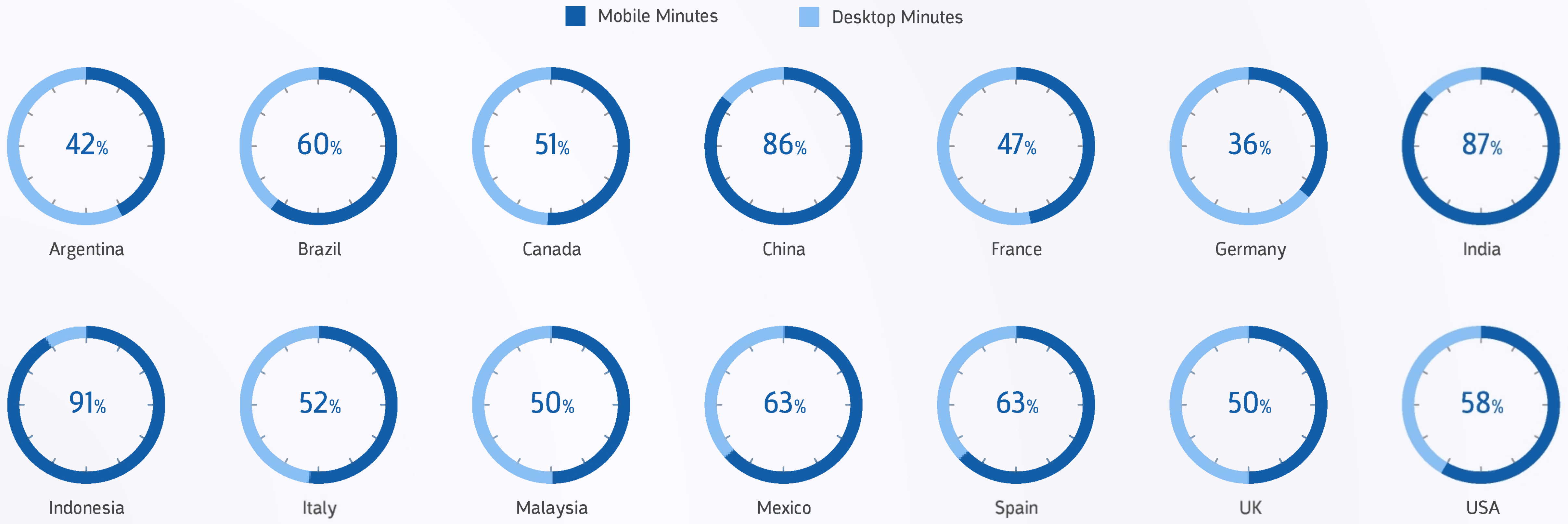


Source: comScore MMX Multi-Platform, May 2017

Global retail time has generally shifted to mobile devices

More than half of time in the retail category has shifted to mobile in most markets, but are they converting?

Share of Retail Minutes by Platform

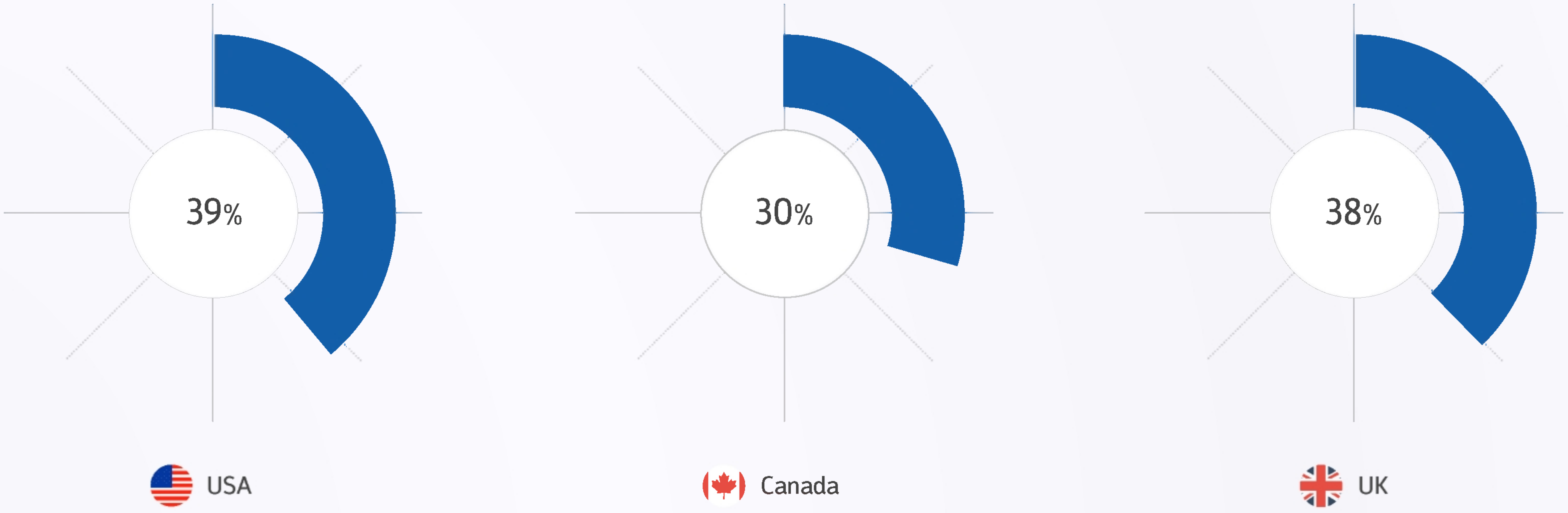


Source: comScore MMX Multi-Platform, May 2017

Fewer than 4 out of 10 mobile users purchase in a month

Under half of all mobile users in three major markets are making all mobile retail transactions

% Making a Retail Purchase on Mobile in a Month

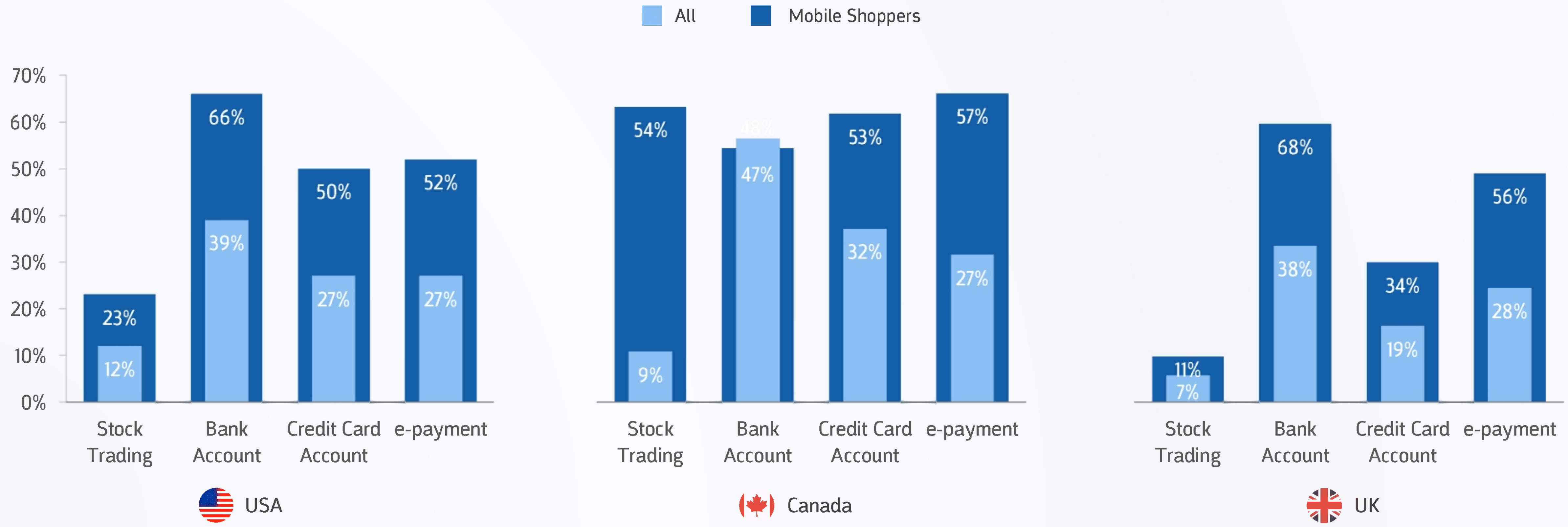


Source: comScore MobiLens, May 2017 (3 month average) for USA / UK, June 2017 for Canada

Mobile shoppers show greater comfort with mobile finance

Retail purchasing is indicative of comfort, with mobile shoppers often 2x more likely to perform finance activities

% Performing Mobile Financial Actions in a Month

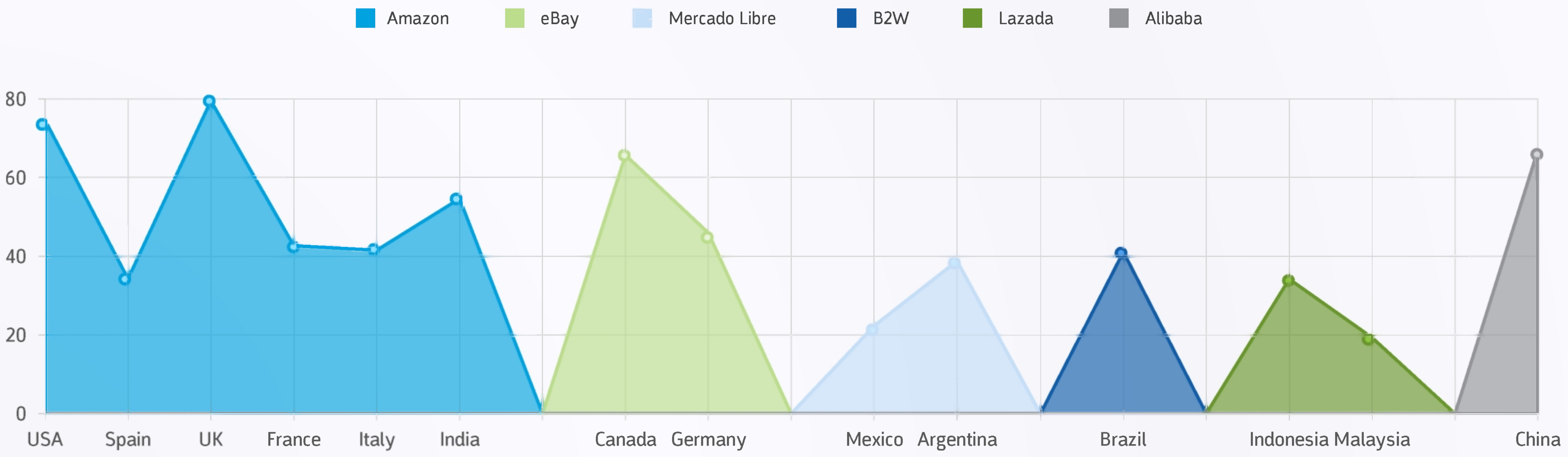


Source: comScore MobiLens, May 2017 (3 month average) for USA / UK, June 2017 for Canada

Large international retailers share market leadership

These 6 retailers dominate the #1 spot in the Retail category across all 14 markets studied

% Mobile Reach for largest Retail entity by country



Footnote

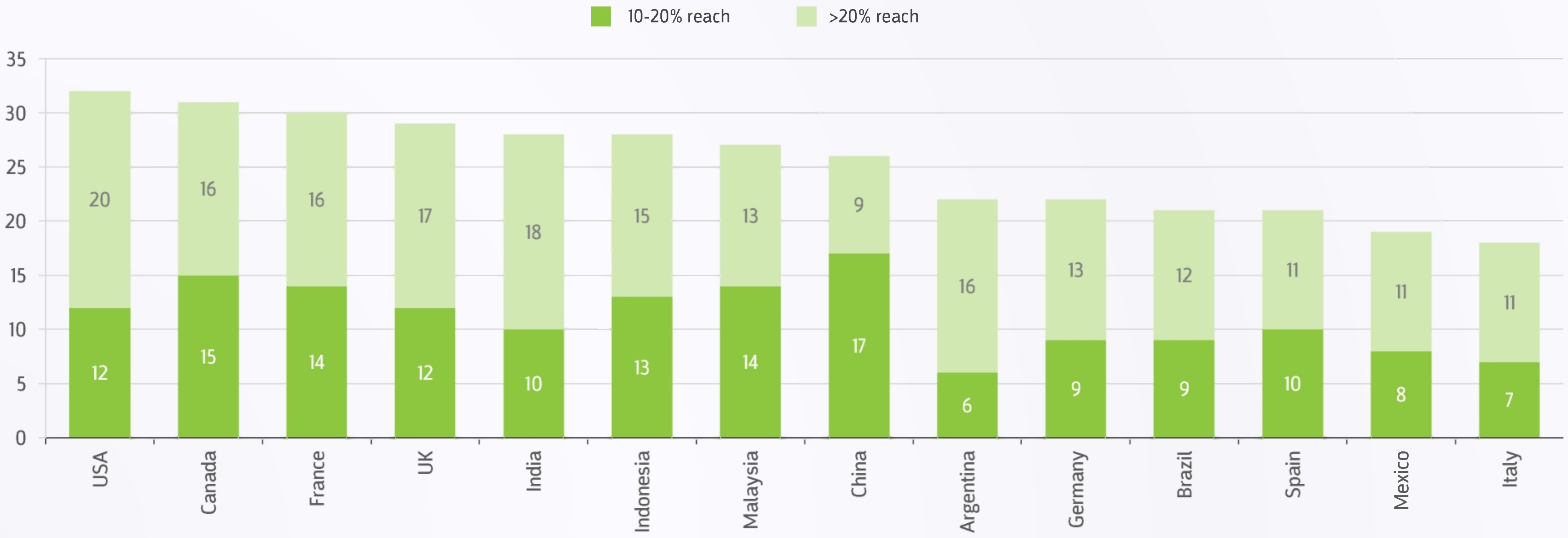
Source: comScore Mobile Metrix, May 2017 | India combines Amazon Mobile and Amazon India Apps. B2W is a a result of the merger between Americanas.com and Submarino.com.

Mobile App Usage

App reach still dominated by a small number of apps

Only US / Canada have over 30 apps reaching more than 10%, and none have more than 20 with 20%+ reach

Number of Apps Within Reach Brackets



Source: comScore Mobile Metrix, May 2017

Reliance on top 30 for mobile minutes is consistent globally

The top 30 apps in all markets generate over 40% of all mobile minutes, and around 60% in Indonesia and Mexico

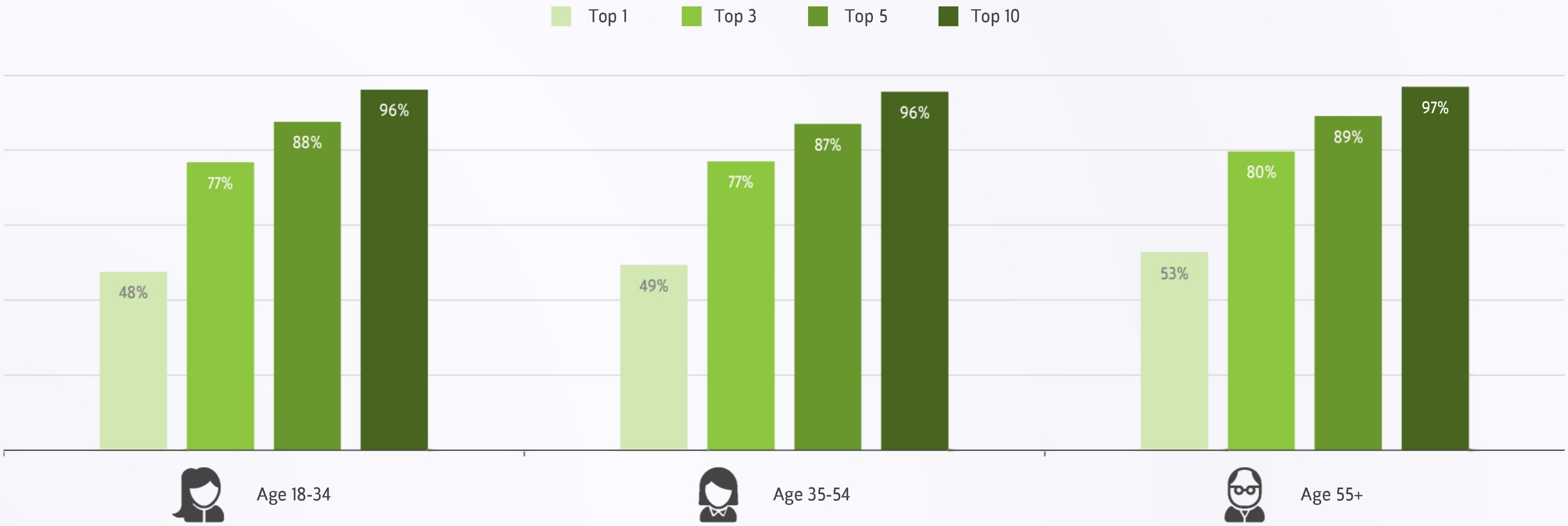
Top 30 Apps' Share of Total Mobile Minutes

Source: comScore Mobile Metrix, May 2017

Individual users spend over 95% of time in their top 10 apps

Almost half of all mobile time is spent inside users' most used app, and nearly all of it within their top 10

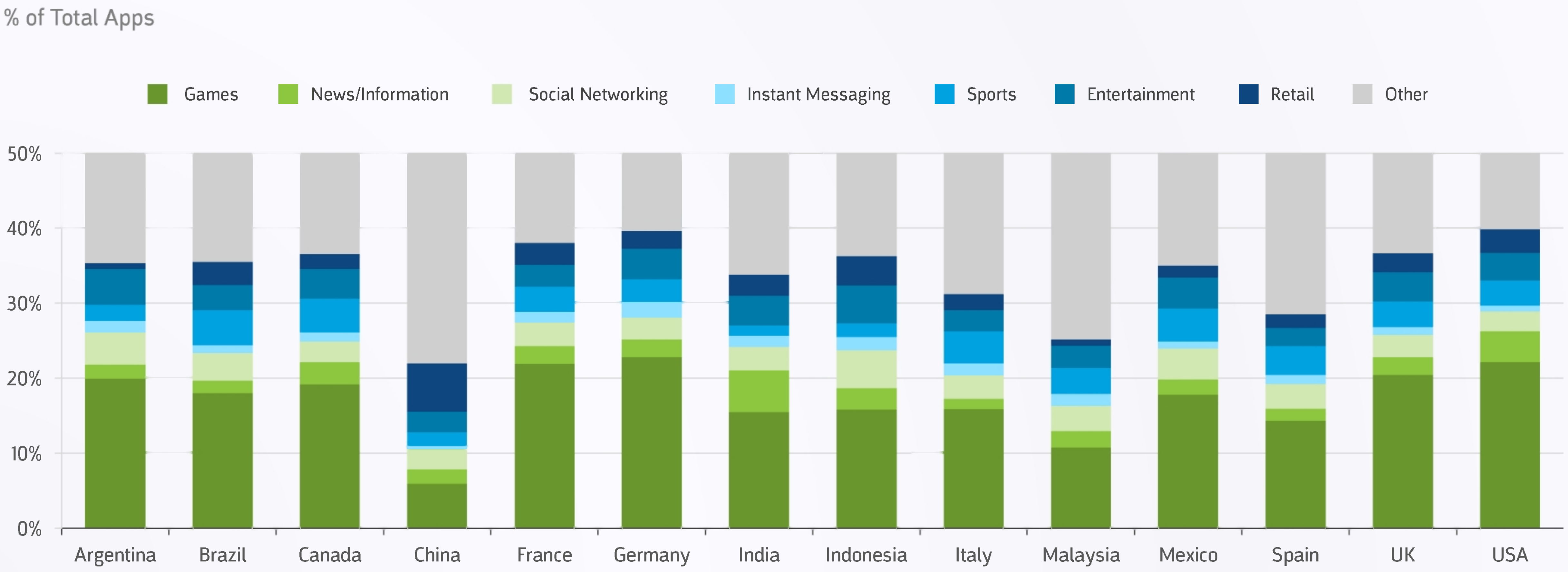
Concentration of Time Spent by Individual Users for App Rank



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

The most significant number of apps are games…

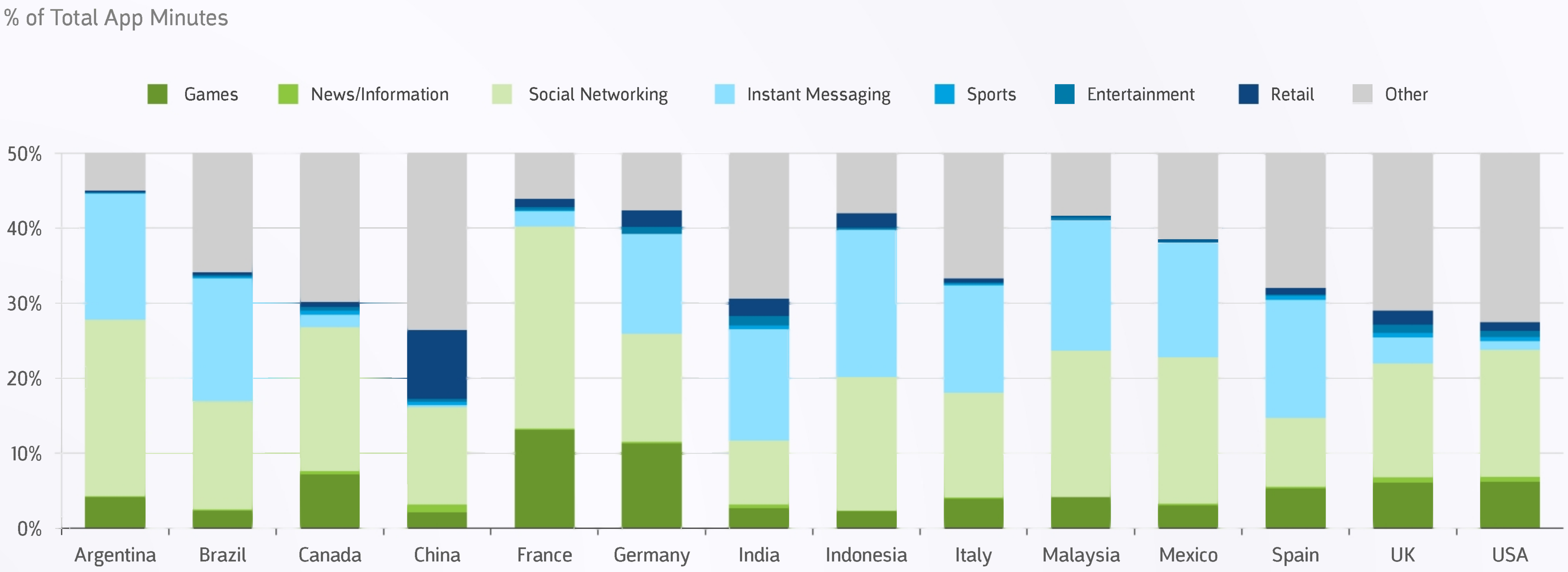
In almost every market, the category with the largest number of apps is gaming



Source: comScore Mobile Metrix, May 2017

…but app minutes are dominated by social and IM

Despite a smaller number of apps, these two categories share a disproportionately large number of minutes

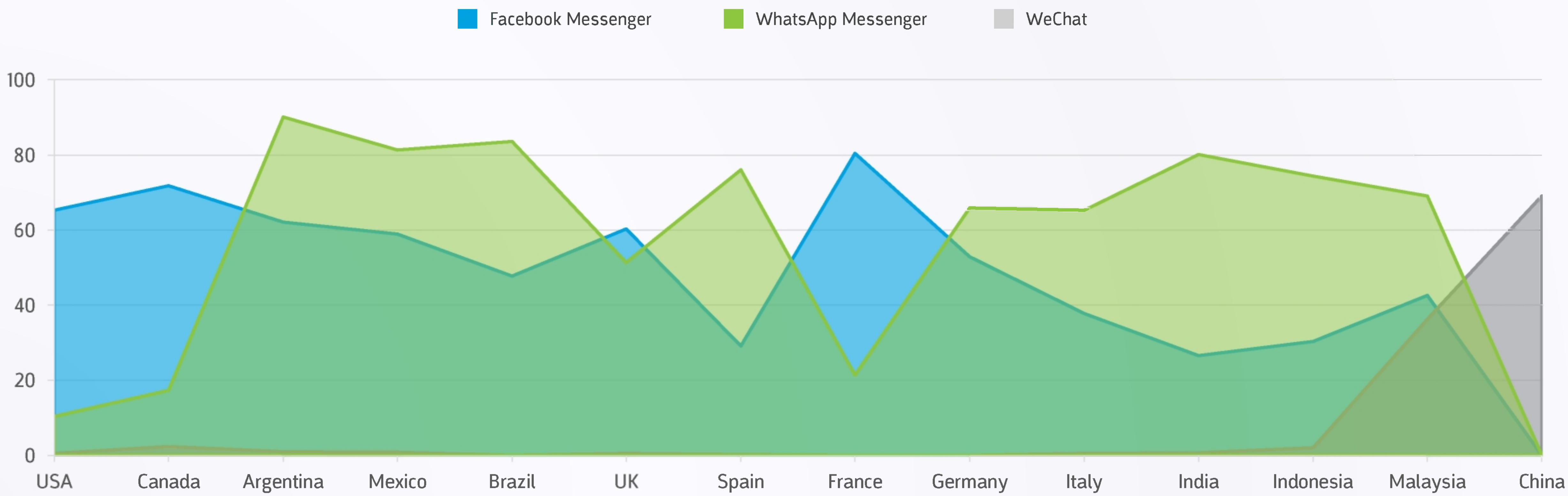


Source: comScore Mobile Metrix, May 2017

Adoption almost binary for Instant Messaging Apps

Despite a relatively small number of apps, markets generally have one established category leader

% Reach of 3 Major Instant Messaging Apps



Source: comScore Mobile Metrix, May 2017

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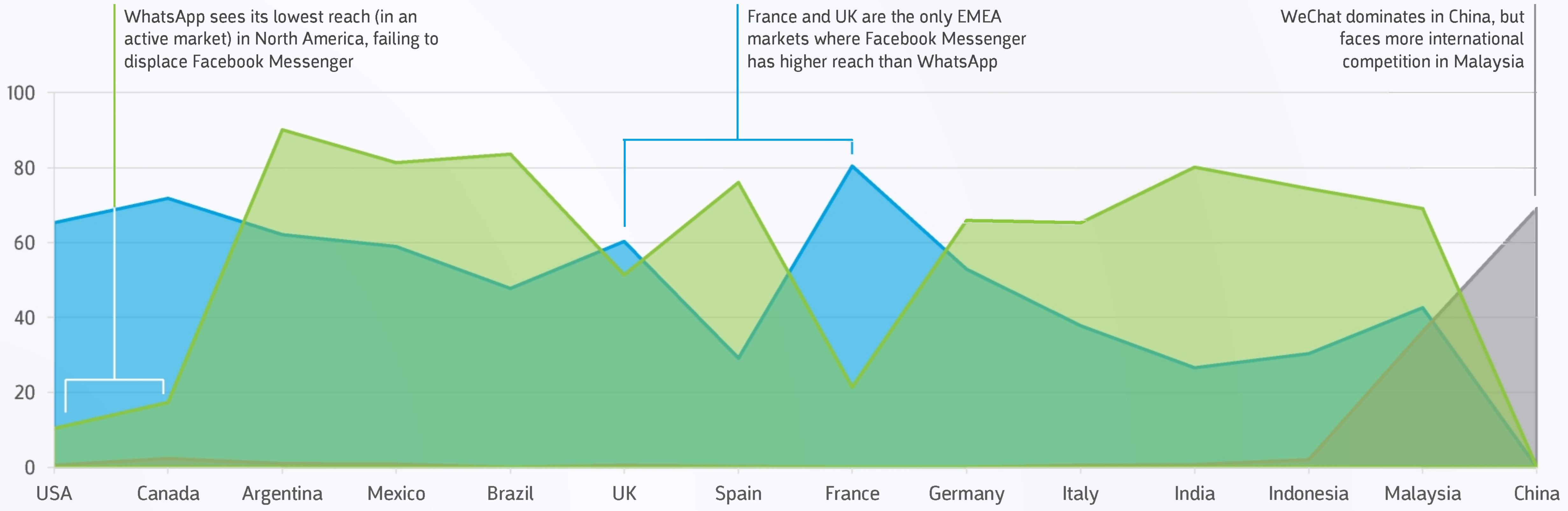
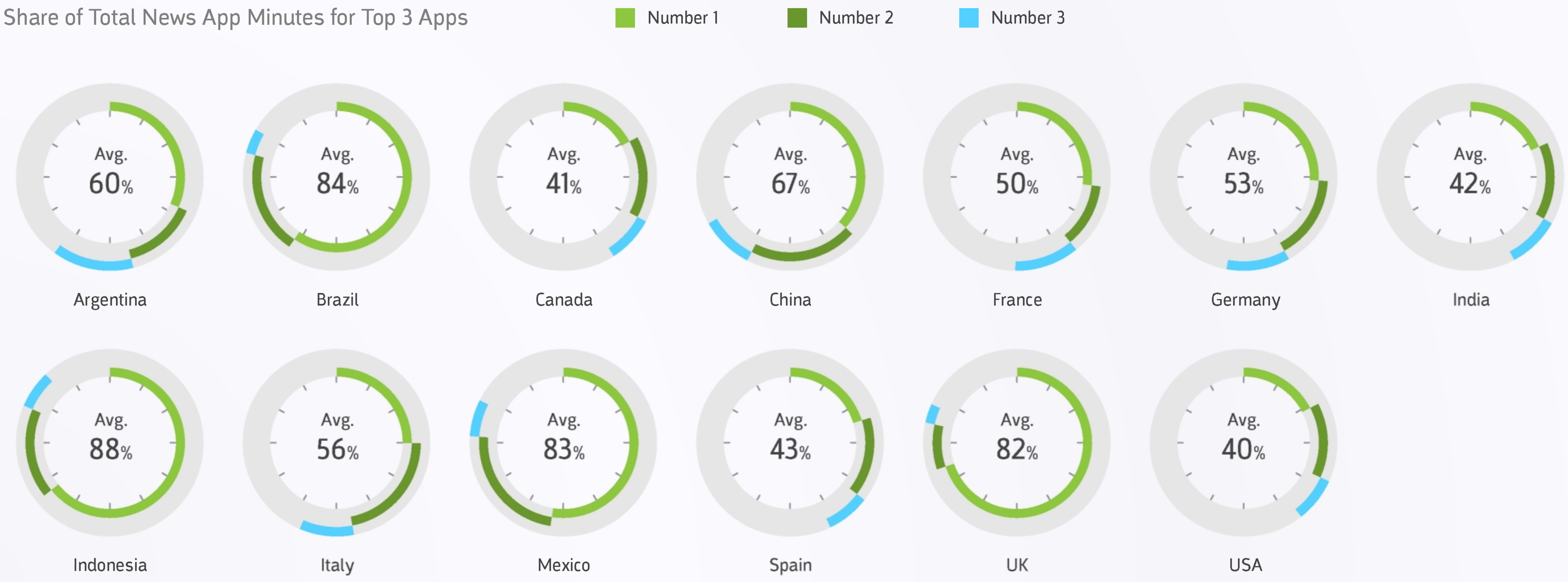


Source: comScore Mobile Metrix, May 2017

Winners Take All: Top News Apps Dominate Category Minutes

The dominance of top apps is especially noteworthy in Brazil, Indonesia, Mexico and the UK

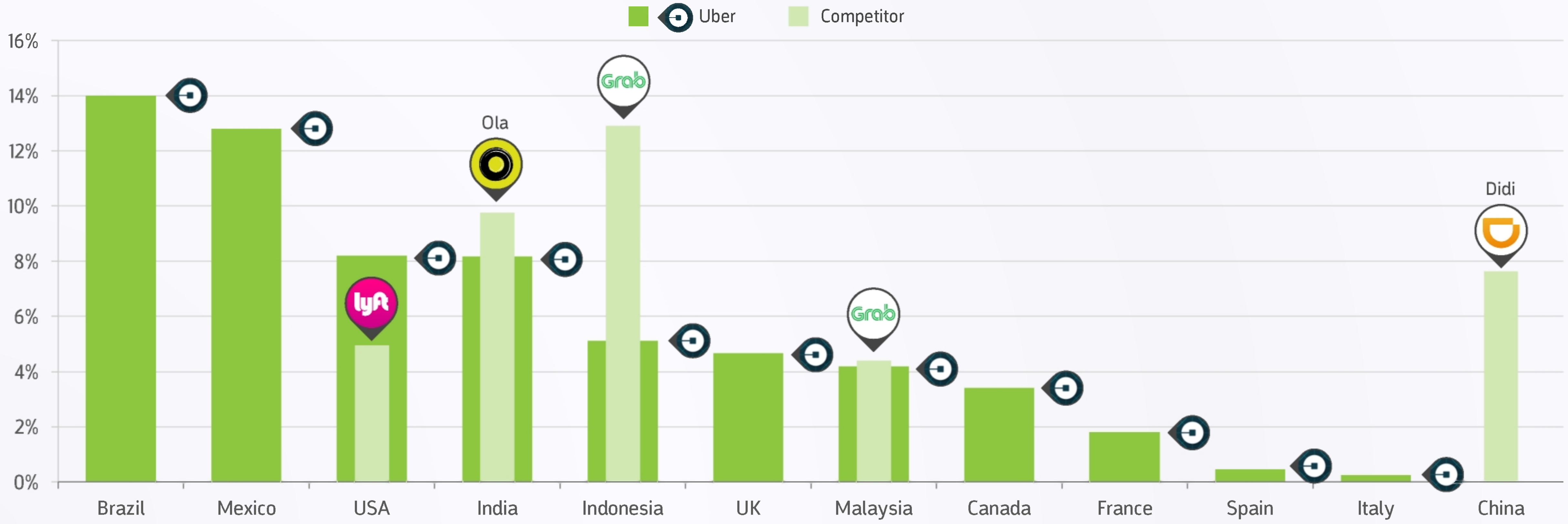


Source: comScore Mobile Metrix, May 2017

Is LATAM leading the Way for the Ride Sharing Economy?

Uber enjoys its highest reach in Brazil and Mexico, although APAC regions appear to support 2 large players

Reach of Uber vs. Selected Ride Sharing Services (% of Mobile Users)

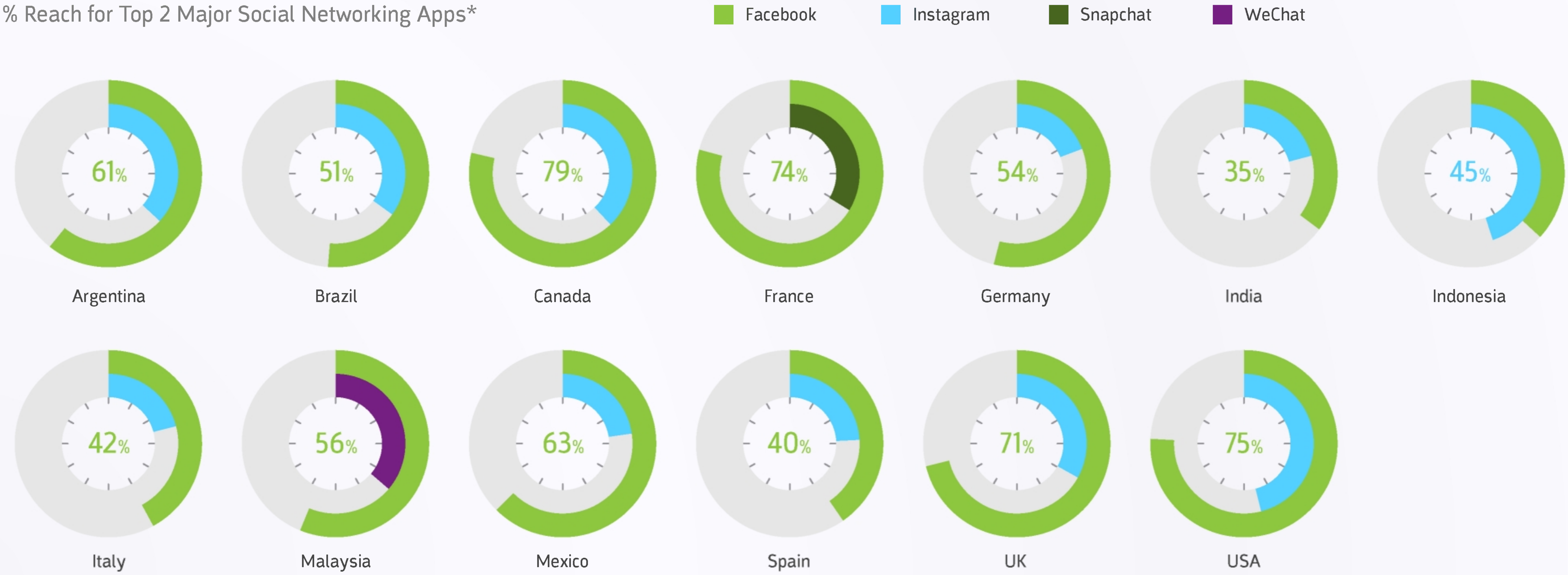


Source: comScore Mobile Metrix, May 2017 | Note: Didi acquired Uber's business in China in 2016.

Facebook leads adoption of global social apps

Other apps are more subject to regional variation, notably in Indonesia where Instagram eclipses even Facebook

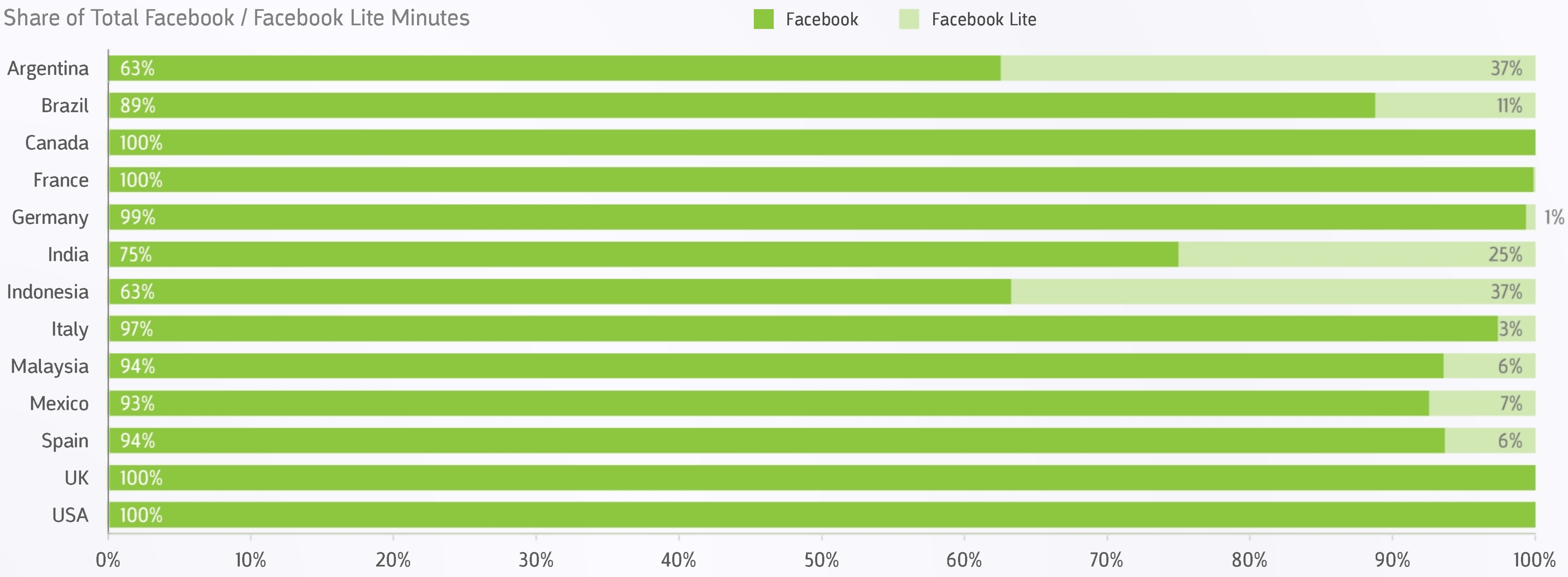
% Reach for Top 2 Major Social Networking Apps*



Source: comScore Mobile Metrix, May 2017 | *Facebook, Google+, Instagram, Pinterest, Snapchat, Twitter, WeChat

Facebook Lite boosts minutes in heavily-mobile markets

Argentina, India and Indonesia are within the top 5 markets for share of mobile minutes

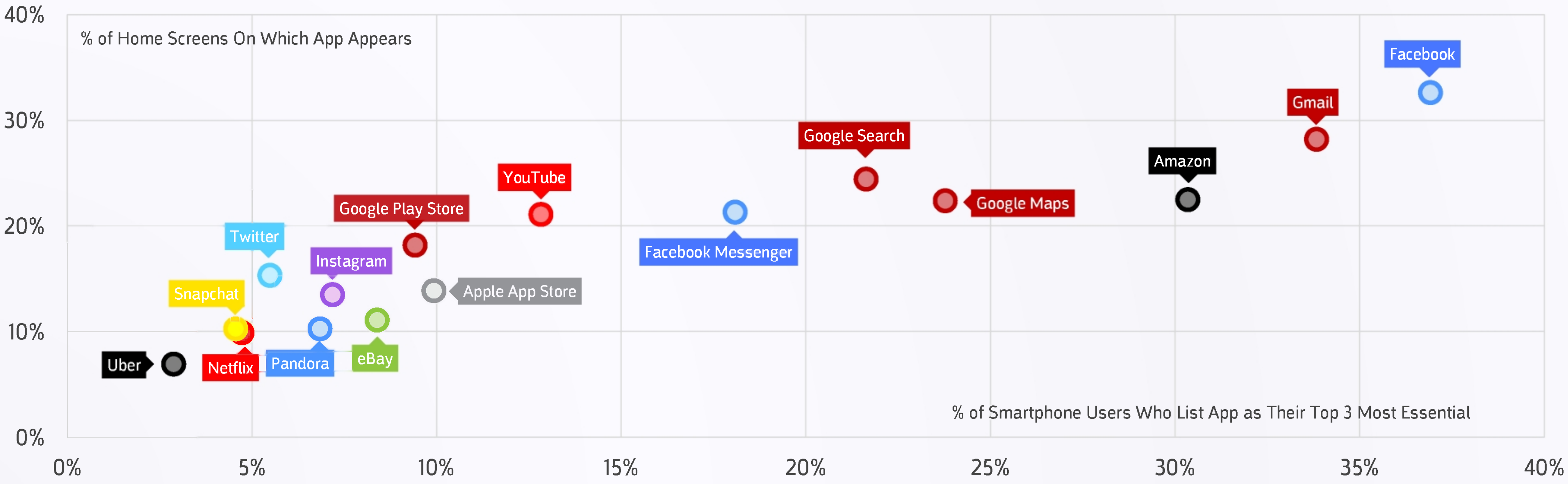


Source: comScore Mobile Metrix, May 2017

Homescreens are the domain of 'essential' apps

There is a strong correlation between apps which make it onto users' homescreen and those considered essential

Selected Smartphone Apps: 'Most Essential' vs. Home Screen Incidence



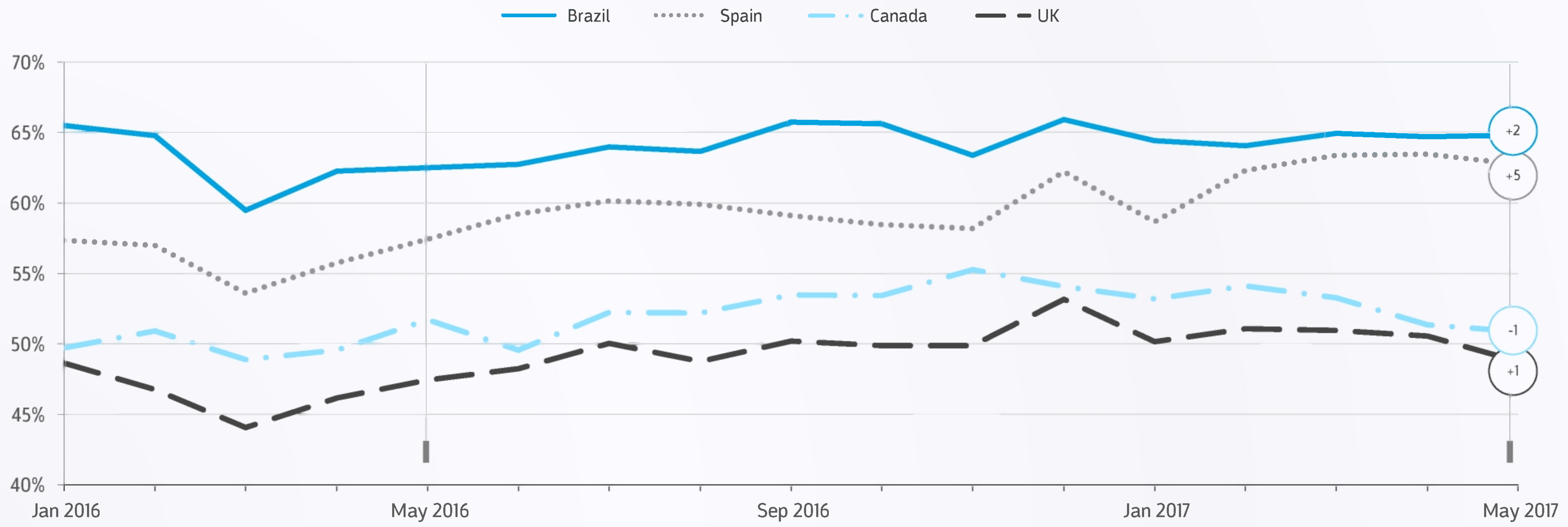
Source: comScore Custom Survey, U.S., Age 18+, July 2017

A Maturing Mobile Marketplace

Apps' share of time appears to have reached a plateau

Most markets saw almost flat or declining change in apps' share of minutes. Only Spain saw noteworthy growth

Mobile app % of total digital minutes

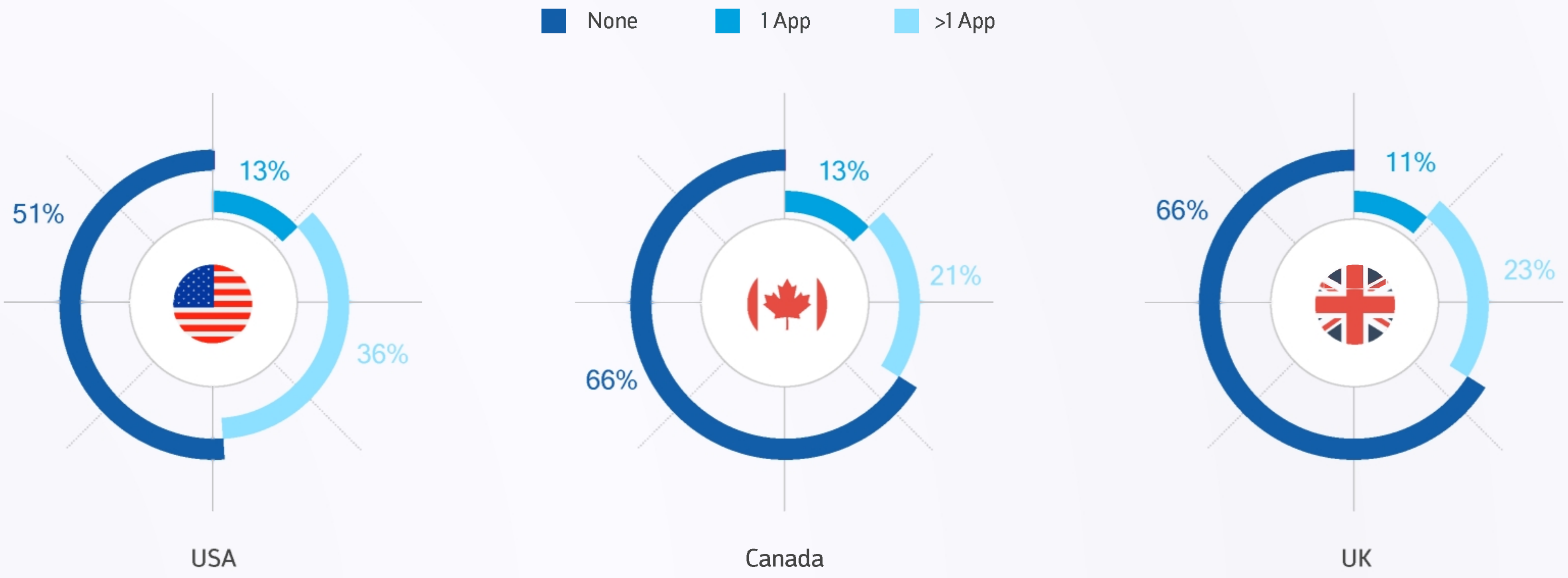


Source: comScore MMX Multi-Platform, May 2017

More than half of users don't download new apps

Only a minority of smartphone owners download more than one, creating hurdles for new apps to be adopted

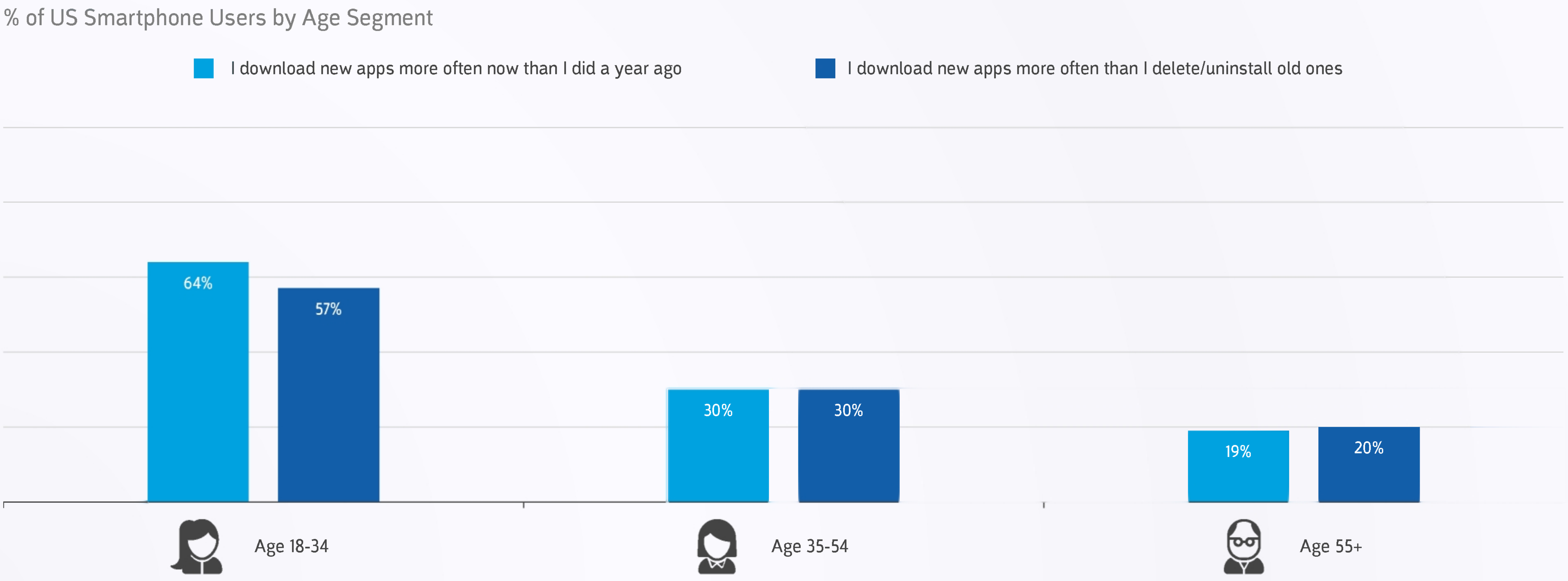
Number of Apps Downloaded in a Month (% of Smartphone Owners)



Source: comScore MobiLens, May 2017 (3 month average) for USA / UK, June 2017 for Canada

Only younger users are 'net positive' for app downloads

Over 35s are more likely to download fewer apps than a year ago, and more likely to delete at a faster rate



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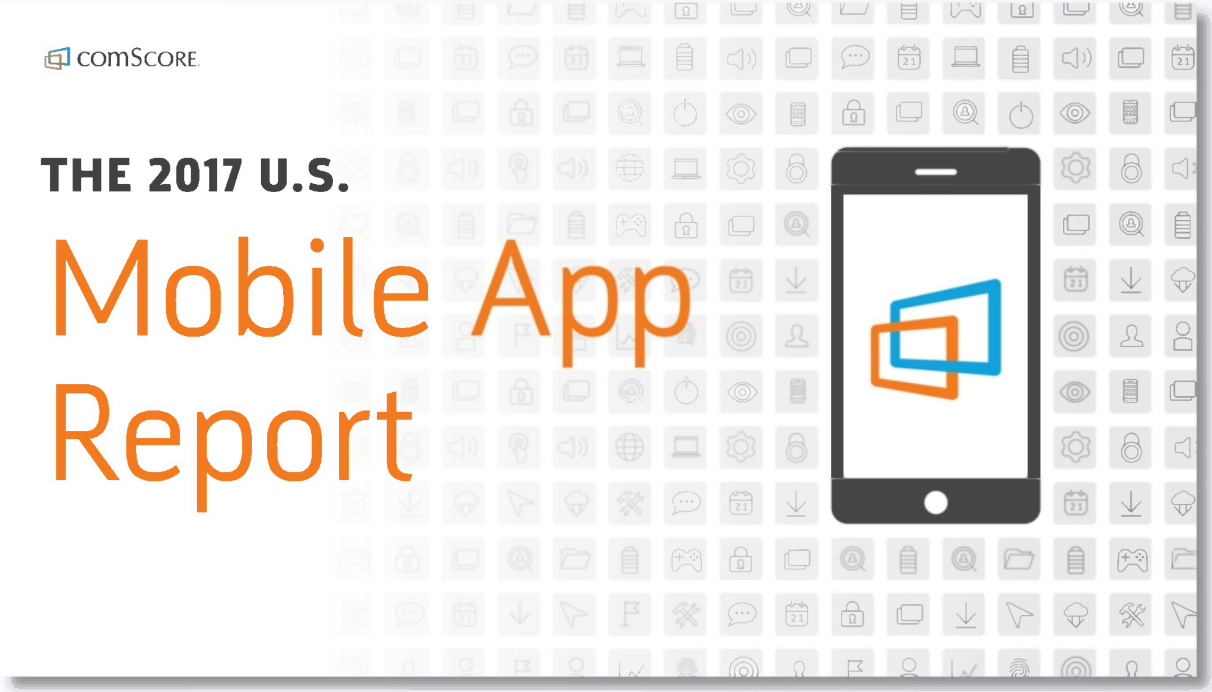
The 2017 U.S. Mobile App Report

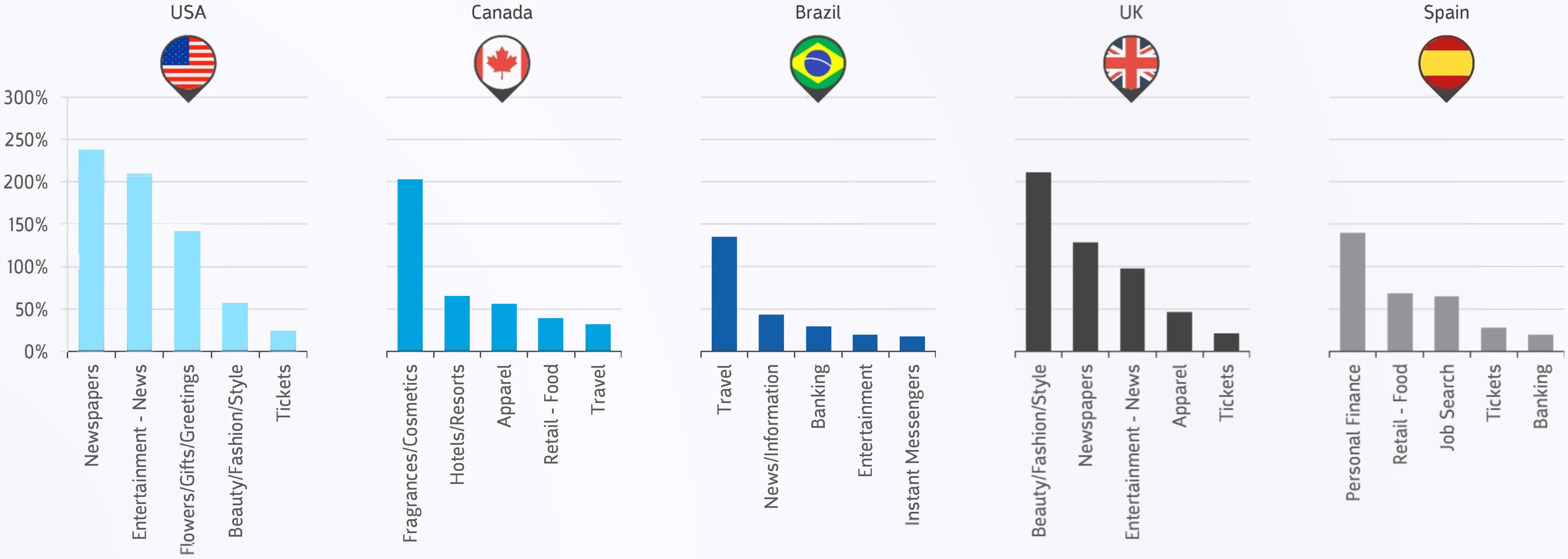


Download **The 2017 U.S. Mobile App Report** for more information

App categories experiencing growth

Flattening overall app time has not stopped some categories tripling audiences in the last year

% Change in Unique Users (May 2016 – May 2017) for Selected Categories



Key takeaways

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Key Takeaways

Mobile Audience Dynamics Vary from Market to Market

While mobile now accounts for the majority of time spent across nearly every market, the extent to which different countries rely on mobile vs. desktop varies considerably. Some markets are dominated heavily by mobile-only internet users, while multi-platform internet usage is the norm in others.

Mobile Usage Time Dominated by a Few Content Categories

Social networking, entertainment and gaming are universally the biggest drivers of overall mobile time, but there is still value across many other categories that are important functions, offer marketing touchpoints or drive transactions.

Comfort with Mobile Transactions Can Unlock Growth for Multiple Categories

Trust and user experience are traditional barriers to m-commerce, and it there is a natural link between users who make retail purchases on mobile devices, and other transactions. Improving confidence and usability can allow transactional categories to truly benefit from an already-enlarged mobile share of time.

Mobile App Usage is Highly Concentrated Within the Leading Apps

Consumers spend more than 95% of their app time on their 10 most regularly used apps, often drawn from a relatively short list of top overall apps that contribute the majority of app time spent and are most likely to be found on users' home screens.

The Mobile Marketplace is Showing Signs of Maturity

Apps' share of overall digital time has plateaued in many markets over the last year. As downloading of new apps begins to stall while usage concentrates among the leaders, the opportunity to disrupt the local or global market is a growing challenge.

Where the data comes from

MMX®
MULTI-PLATFORM

Get a complete, unduplicated view of how digital audiences consume content across devices

MOBILE METRIX®

Understand total mobile audience behaviour across browsers and apps

MOBILENS

Gain a deeper understanding of your mobile audiences' behaviours and device preferences

CUSTOM SOLUTIONS

Gain tailored mobile and desktop insights to address unique business needs

Why comScore

MASSIVE SCALE

Our scale of digital census network, mobile and desktop panels enables measurement of real consumer behaviour.

MULTI-PLATFORM AUDIENCES

First to measure unduplicated audience across desktop, smartphones and tablets.

TRUSTED EXPERIENCE

Over 17 years measuring audiences around the world.

About This Report

The Global Mobile Report leverages several data sources unique to comScore:

- The report is based primarily on behavioral measurement from comScore MMX Multi-Platform, which provides deduplicated reporting of digital audiences across desktop computers, smartphones and tablets, and comScore Mobile Metrix®, which provides deduplicated reporting of mobile web and app audiences across both smartphones and tablets. The report also includes survey-based data from comScore MobiLens®.
- Custom analytics data derived from the aforementioned products' data streams is also included.
- The report also incorporates results from a survey of 1,033 smartphone users in July 2017 to understand their habits. In some charts we compare these results to our August 2016 and August 2015 surveys.

Important Definitions:

- Any reference to "mobile" means the combination of smartphone and tablet. When data is referring specifically to smartphones or tablets, it will be labeled accordingly.
- All mobile data is based on Age 18+ population except where labelled otherwise. Mobile reporting in Spain, Brazil, Argentina, Mexico, Italy, France, Germany, India, Indonesia, Malaysia is conducted via an Android smartphone panel and census-based measurement for tagged entities. In USA, UK and Canada, this is supplemented by iOS panels.
- A "unique visitor" is a person who visits an app or digital media property at least once over the course of a month. This metric, in app parlance, is equivalent to a "monthly active user/MAU".

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