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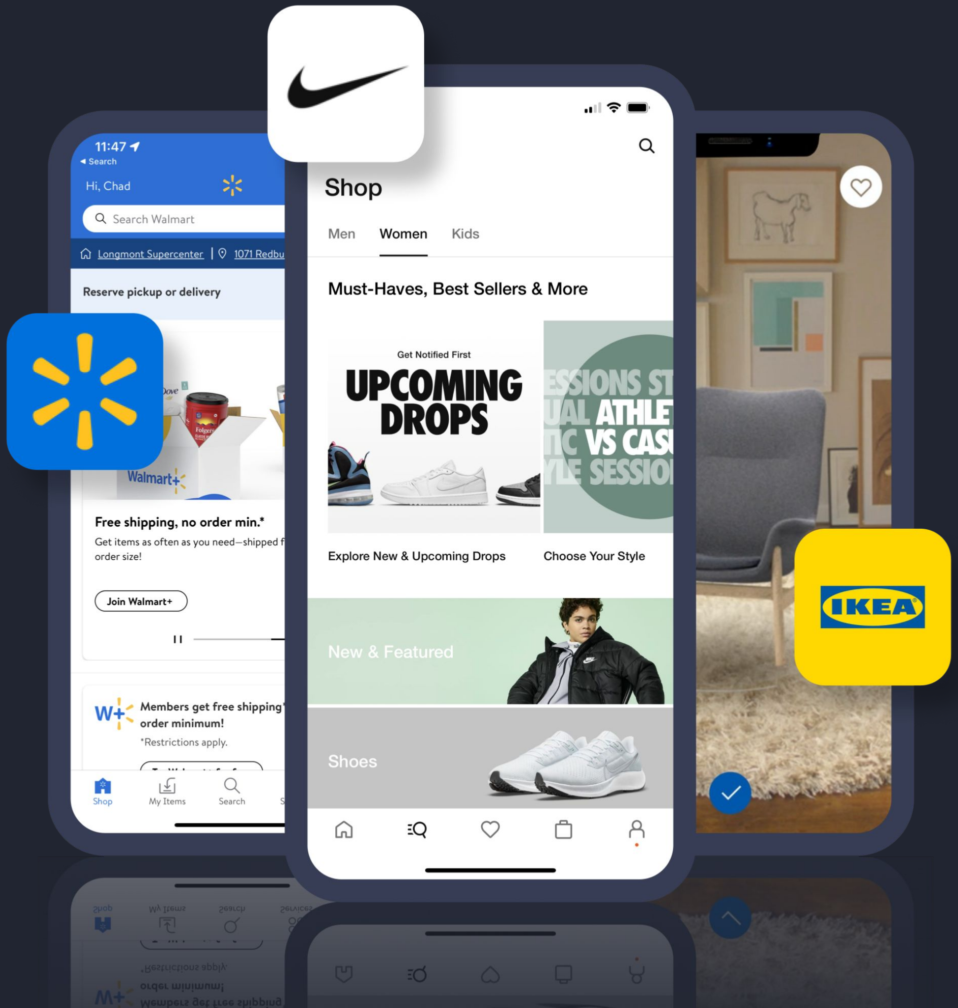
Benchmarking the Global Mobile Retailing Landscape

With deeper performance insights for the U.S. market



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01

Trends & Top Performing Shopping Apps of Q4 2021 and Full Year 2021

All Apptopia estimates are inclusive of those from iOS and Google Play. In-app revenue estimates are what the publisher receives after fees are levied by Apple and Google.

10 Most Downloaded Shopping Apps in Q4 2021

Rank	Worldwide	Europe	United States	Latin America	Southeast Asia
#1	Meesho 70.8M	Vinted 6.2M	Amazon 11.5M	Shopee 40M	Shopee 41.9M
#2	Shopee 68.4M	Lidl Plus 6.1M	Walmart 9.5M	SHEIN 14.6M	Lazada 15.8M
#3	SHEIN 43.6M	SHEIN 4.2M	Shop 8.4M	Mercado Libre 11.7M	SHEIN 3.8M
#4	Amazon 40.1M	Klarna 4M	SHEIN 6.8M	Facily 9.7M	Tokopedia 3.3M
#5	Flipkart 39.2M	AliExpress 3.1M	Klarna 6.2M	Americanas 7.8M	Akulaku 3.3M
#6	AliExpress 20M	Zalando 3.1M	Nike 5M	Magalu 6.3M	ShopBack 1.9M
#7	Pinduoduo 18.9M	eBay 2.9M	Etsy 4.8M	AliExpress 4.8M	Indomaret Poinku 1.7M
#8	Taobao 18.1M	Amazon 2.7M	Target 4.7M	Casas Bahia 4M	Blibli Belanja Online Mall 1.4M
#9	Lazada 16.6M	Shop 2.6M	OfferUp 4.1M	Amazon 3.3M	Alibaba 1.4M
#10	Nike 14.2M	Kaufland 2.2M	Fetch Rewards 4M	Extra 2.8M	Tiki 1.2M

Outsmart your competition with app intelligence from apptopia.com

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10 Most Downloaded Shopping Apps in 2021

Rank	Worldwide	Europe	United States	Latin America	Southeast Asia
#1	Shopee 211M	Vinted 26.9M	Amazon 41.4M	Shopee 118M	Shopee 87M
#2	SHEIN 193M	SHEIN 23.9M	SHEIN 32.3M	SHEIN 53.4M	Lazada 65.6M
#3	Meesho 162M	Lidl Plus 16.9M	Shop 31.1M	Mercado Libre 44.4M	Tokopedia 19.4M
#4	Amazon 154M	AliExpress 12.6M	Walmart 28.5M	AliExpress 25.1M	SHEIN 14.7M
#5	Flipkart 96.9M	eBay 12.4M	OfferUp 17.6M	Magalu 22.7M	Akulaku 11.7M
#6	AliExpress 86M	Amazon 12M	Nike 17.4M	Americanas 22.7M	Alibaba 8.2M
#7	Wish 72.9M	Zalando 11.4M	Fetch Rewards 16.5M	Facily 17.7M	ShopBack 6.9M
#8	Pinduoduo 70.9M	Klarna 10M	eBay 16.3M	Amazon 16.1M	Indomaret Poinku 5.9M
#9	Lazada 69.2M	Wish 9.6M	Klarna 14.5M	enjoei 13.7M	Wish 4.6M
#10	Alibaba 63.1M	Shop 9.4M	Wish 14.3M	Casas Bahia 13.1M	JD.com 4.5M

Trends & Top Shopping App Performance

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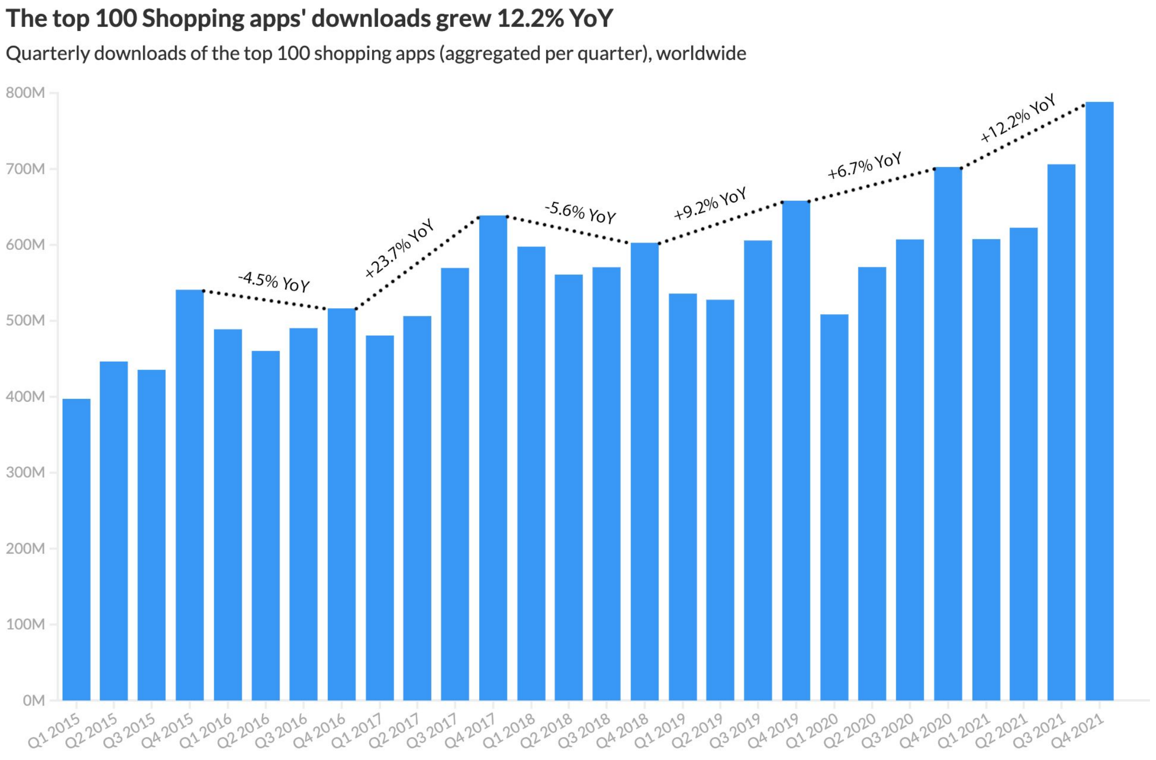


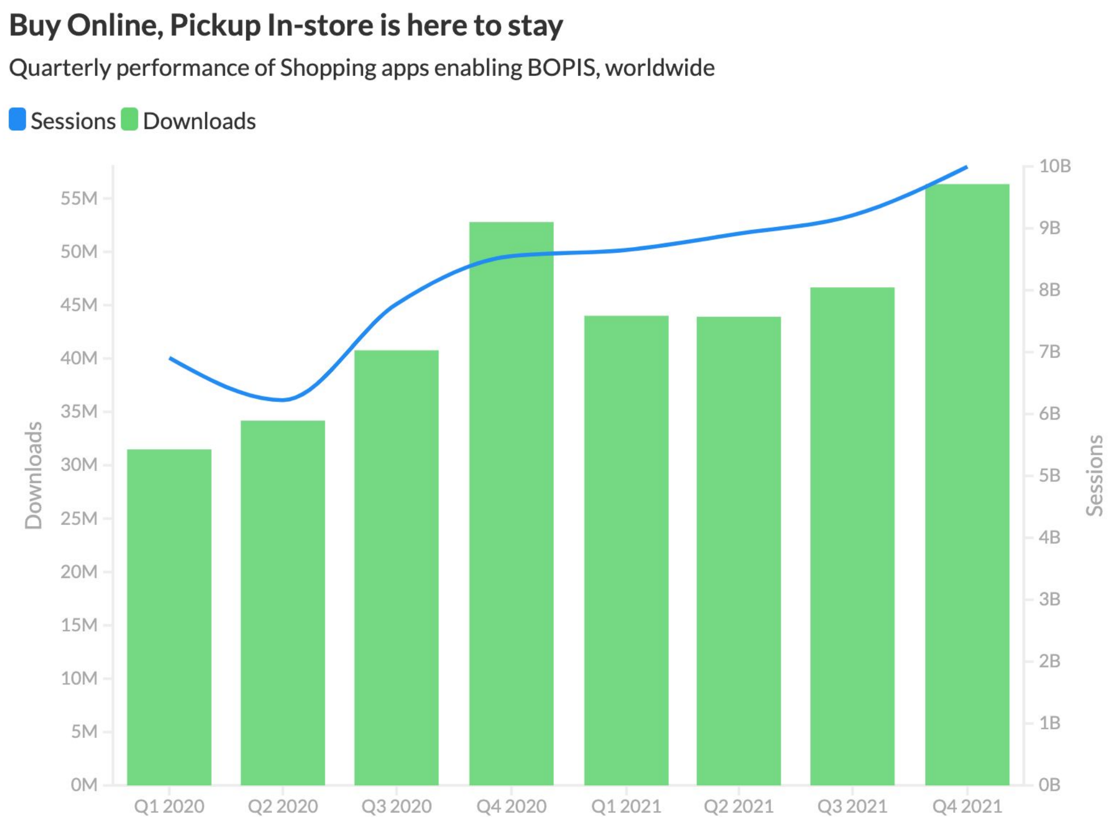
WHAT TO KNOW

The top 100 Shopping apps across the globe have grown year-over-year in the fourth quarter for three consecutive years.

With more than 788 million downloads, Q4 2021 had more new installs of top shopping apps than any quarter previously.

Ecommerce, BOPIS (buy online, pickup in store), BNPL (buy now, pay later) and niche shopping experiences have led to increased demand for retailers' mobile apps.

Trends & Top Shopping App Performance



WHAT TO KNOW

Apps enabling BOPIS have grown user sessions 17% YoY (year-over-year) in the fourth quarter.

BOPIS has made the move from a nice to have to a need to have for brick n' mortar retailers.

The feature was an ecommerce trend before the pandemic but the incentive to pick up orders without leaving the car, or not have to stay in a physical store too long, increased dramatically and so did the response from retailers.

Trends & Top Shopping App Performance

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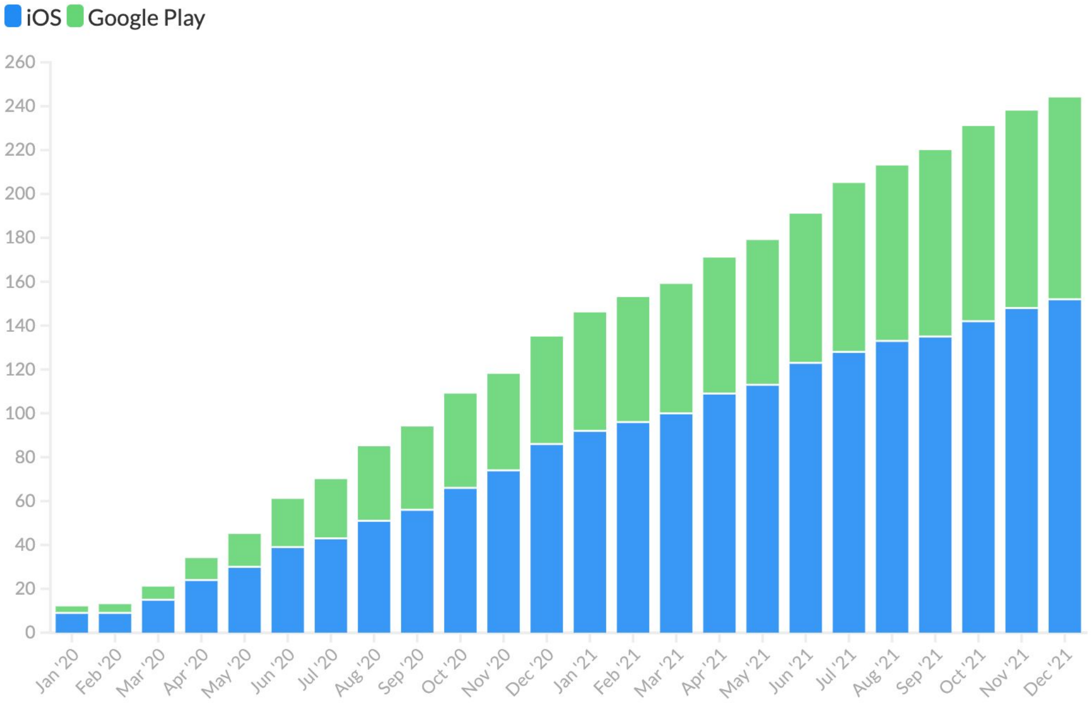
Augmented reality may help convert mobile shoppers into mobile buyers

Number of apps in the Shopping category with AR functionality live



WHAT TO KNOW

Referencing Apptopia's X-Ray dataset, we see a dramatic increase in the number of Shopping apps deploying augmented reality tools into their mobile apps.

Companies like Warby Parker and Sephora are enabling shoppers to virtually try on products to see how they look before purchasing. This increases time spent in-app and confidence in making a buying decision for the shopper.

Furniture companies like Ikea and Wayfair are also using AR so shoppers can visualize what a new couch might look like in their family room.

Trends & Top Shopping App Performance

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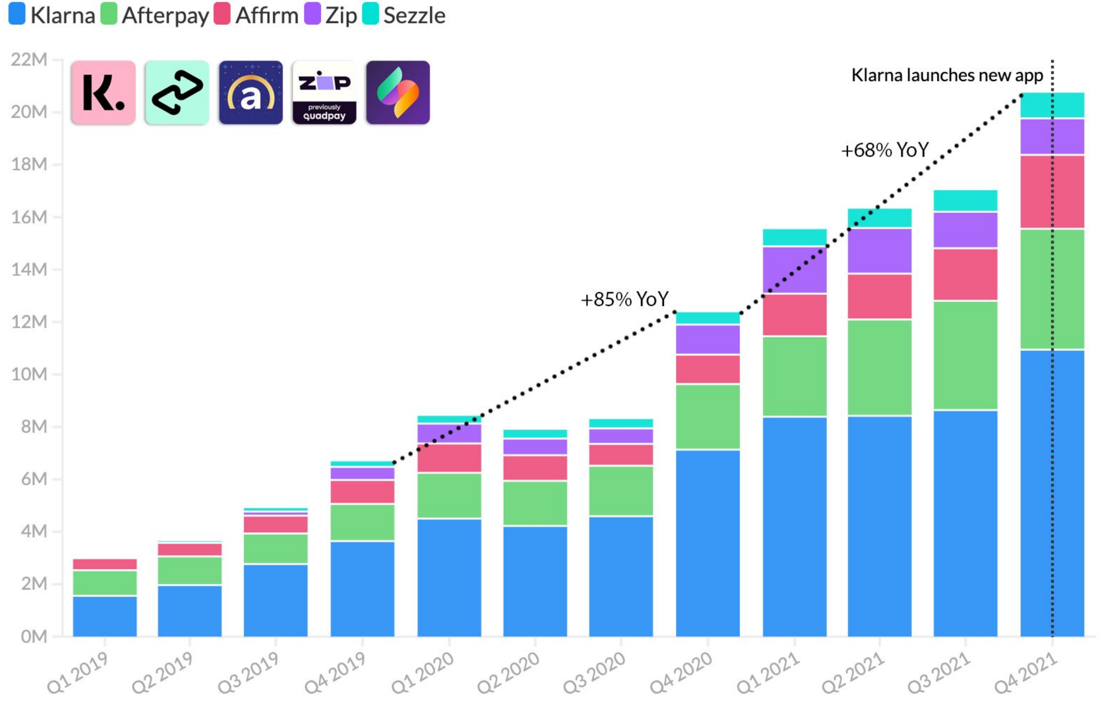
Buy Now, Pay Later apps continue to reach new heights

Average monthly active users, worldwide



WHAT TO KNOW

Buy now, pay later apps are not included in our grouping of global ecommerce marketplaces but they are a driver of business for them, enabling more customers to purchase big ticket items.

Affirm grew the most at 152% YoY in Q4 but Klarna continues to dominate with new users coming to the BNPL market.

After launching a “new” app in November, Klarna increased its market share two points from Q3 to Q4 in 2021.

Identify market opportunities & threats faster with data.
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02

Ecommerce Marketplaces

Apps tied to companies which launched online initially. They likely do not have any physical stores. These apps are selling across a variety of verticals and are not D2C brands.

Ecommerce Marketplaces

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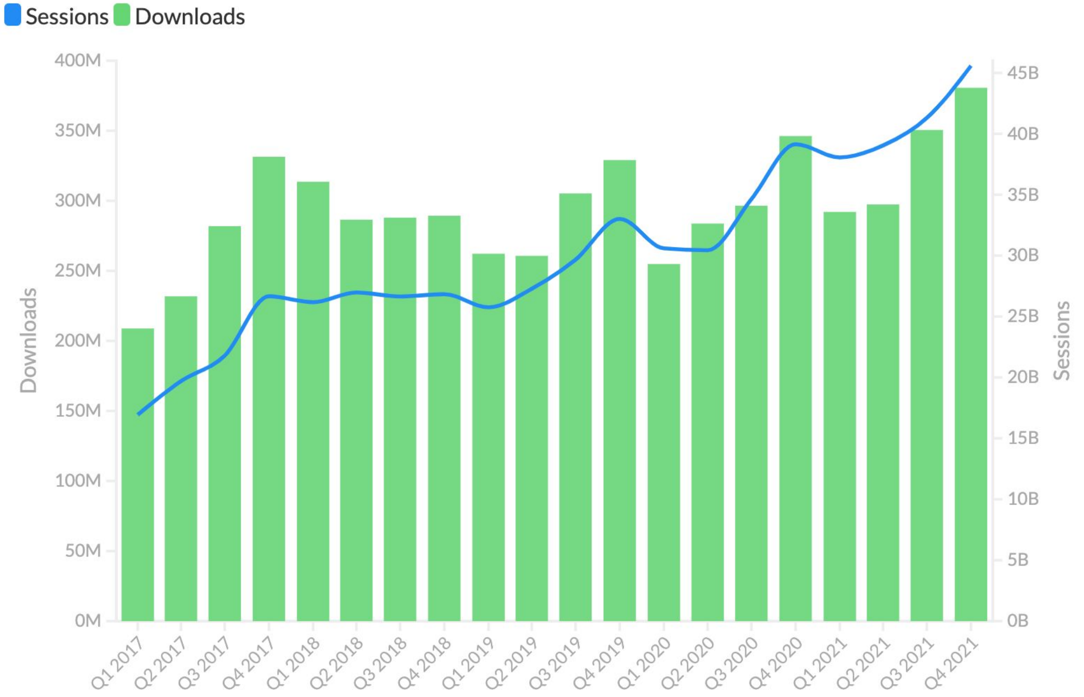
Ecommerce marketplace usage growth is stronger than new user growth

Quarterly performance of the top 25 ecommerce apps, worldwide



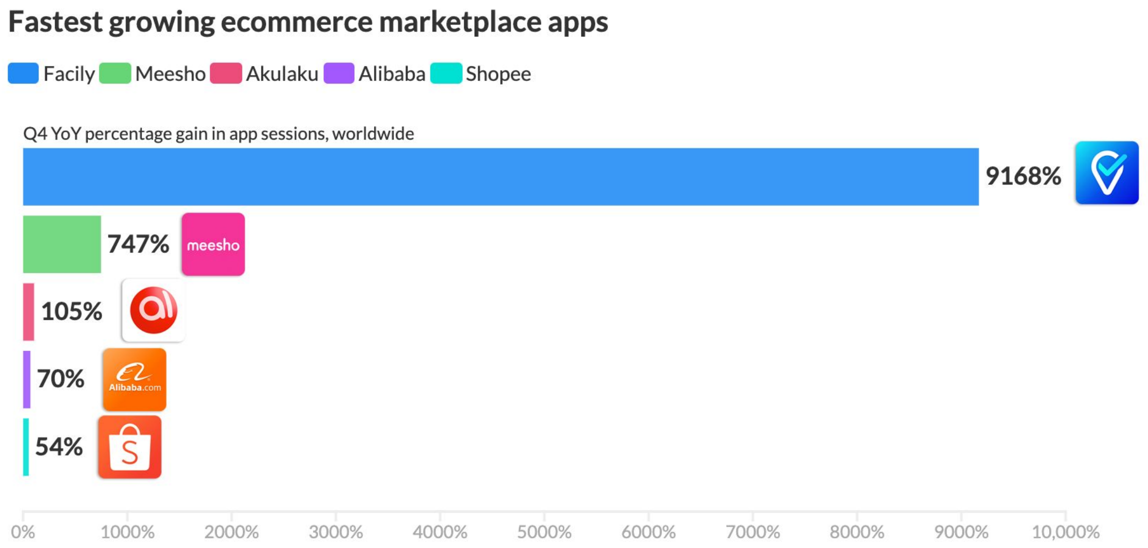
WHAT TO KNOW

With 381 million downloads and 45.6 billion app sessions in Q4 2021, the top 25 ecommerce apps had their best quarter so far.

Downloads grew 10% YoY while app sessions grew 16.5% YoY.

Nine out of the ten most downloaded shopping apps globally in 2021 fall into our defined category of Ecommerce Marketplaces. They are by far the largest driver of mobile app shopping activity.

Ecommerce Marketplaces



WHAT TO KNOW

Facily has taken a page out of Pinduoduo's book and opted to provide better prices through group purchases, enabling stronger word of mouth marketing. Facily also provides pickup points (no shipping cost for consumer) and a variety of payment options for Brazil's unbanked consumers.

Meesho was easily the most downloaded shopping app in India this year. It's a reseller and marketplace platform combined, and became the first ecommerce company in India to have 0% commission for its sellers.

Akulaku has benefitted from natively offering a buy now, pay later service with no credit cards required.The app is almost exclusively used in Indonesia.

Ecommerce Marketplaces

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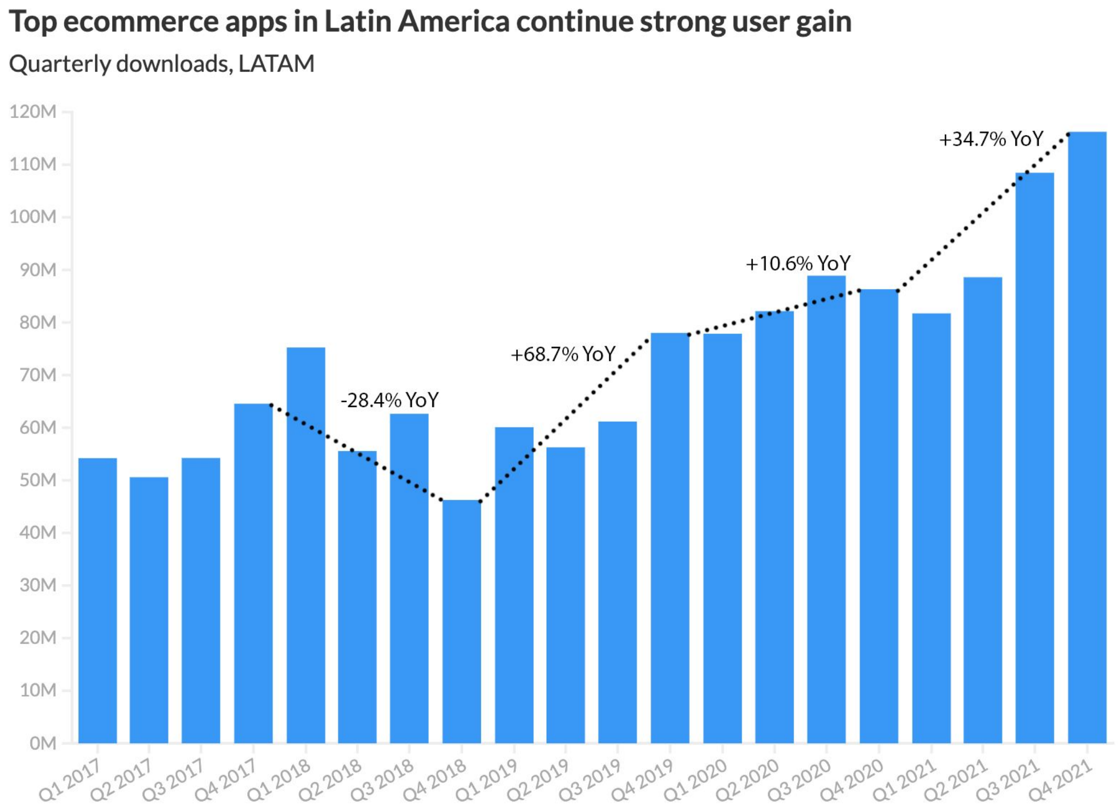

WHAT TO KNOW

Downloads of the top ecommerce apps in Latin America continue their impressive growth, reaching an all-time high of 116 million in Q4 2021. This is an emerging market, where being unbanked had previously meant one could not be an ecommerce customer.

Shopee and Mercado Libre combined have generated 45% of Q4 downloads in 2021.

Mercado Libre is typically thought of as the dominant ecommerce player in Latin America but there are several fast growing competitors such as Facily, Sou Barato and Riachuelo.

Ecommerce Marketplaces

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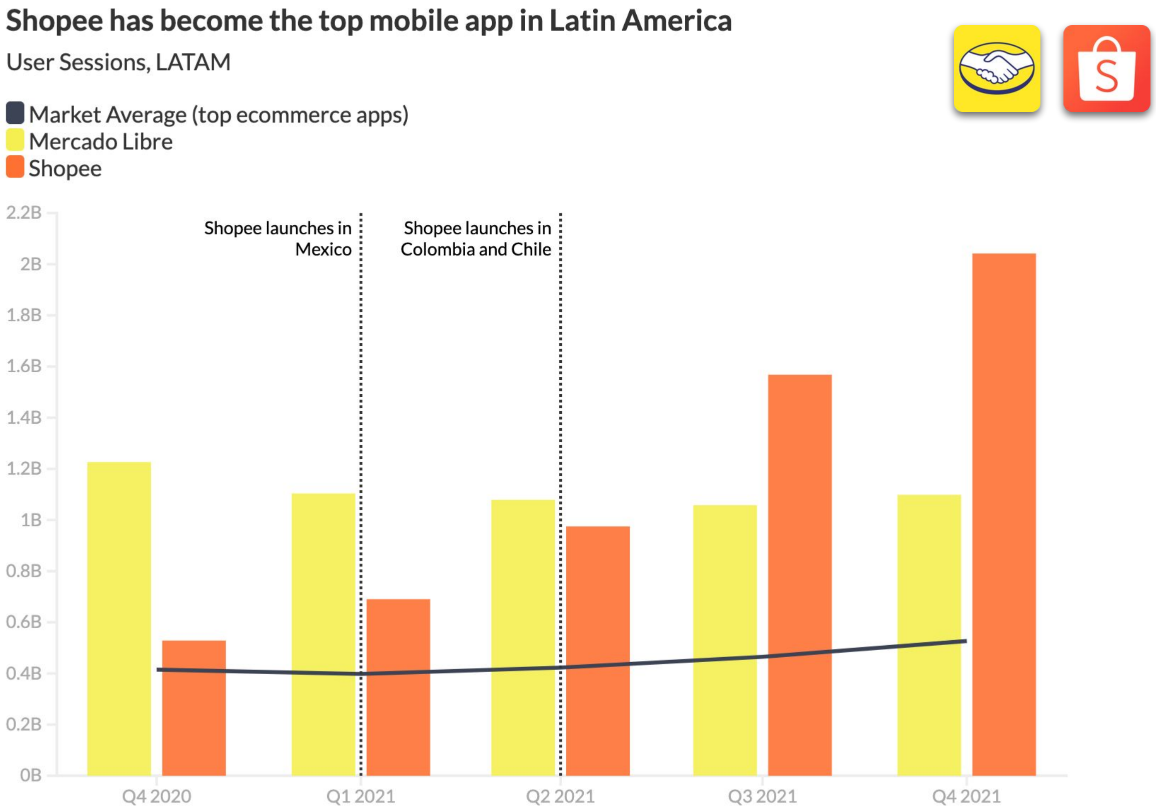
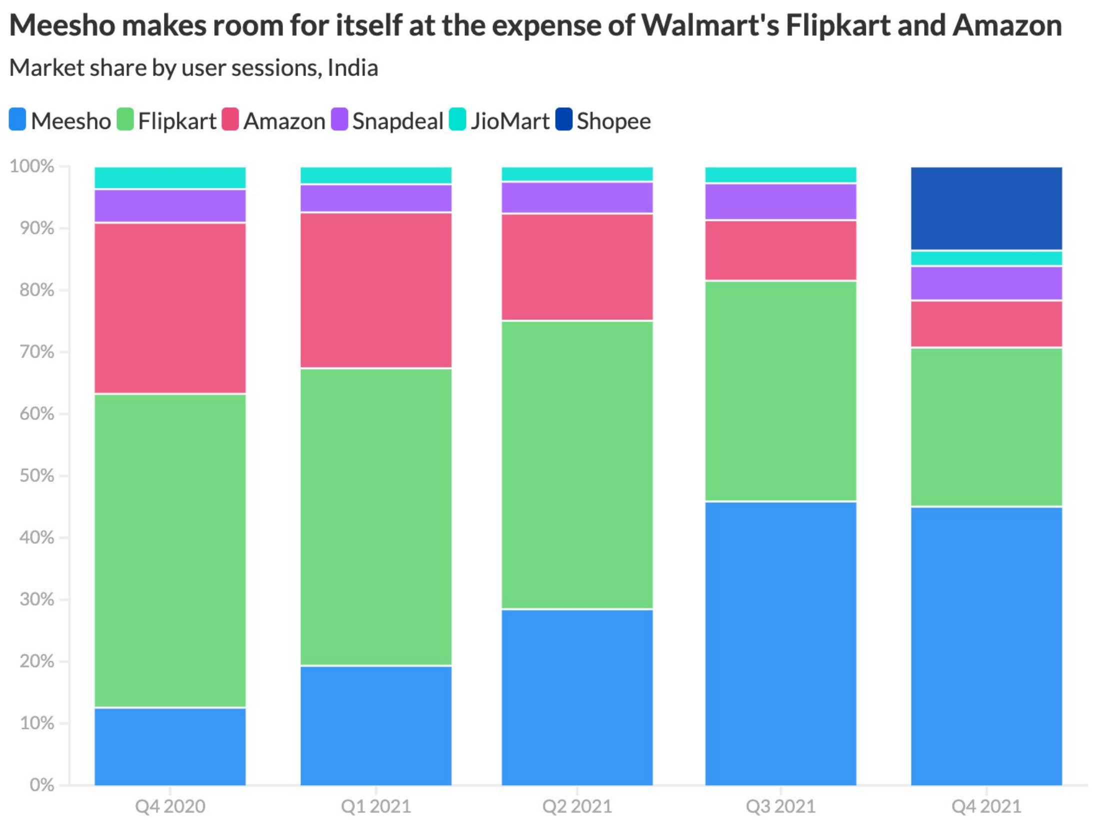


WHAT TO KNOW

Ecommerce players are figuring out how to compete and grow in the LATAM market.

Shopee, owned by Sea Limited and headquartered Singapore, has become the top shopping app in Latin America.

While Mercado Libre's mobile app growth is stagnating, another competitor in Amazon has also surpassed it last calendar year when looking at user sessions.



WHAT TO KNOW

Meesho’s market share was growing strong all year long before taking a slight step back when Shopee entered the market. With each quarter Meesho grew, it looked to have a direct impact on the market shares of both Flipkart and Amazon.

Shopee expanded into India in November 2021, and took a 13.6% chunk of market share in just two months. Shopee wastes no time and typically grows rapidly into any market it enters.

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U.S. Market Overviews

Brick n' Mortar

Fast Fashion

Direct to Consumer

C2C Marketplaces

Luxury

All Apptopia estimates are inclusive of those from iOS and Google Play. IAP revenue estimates are what the publisher receives after fees are levied by Apple and Google.

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03

Brick n' Mortar

Apps stemming from retail businesses which are traditionally and/or primarily known for their physical locations.

Brick n' Mortar

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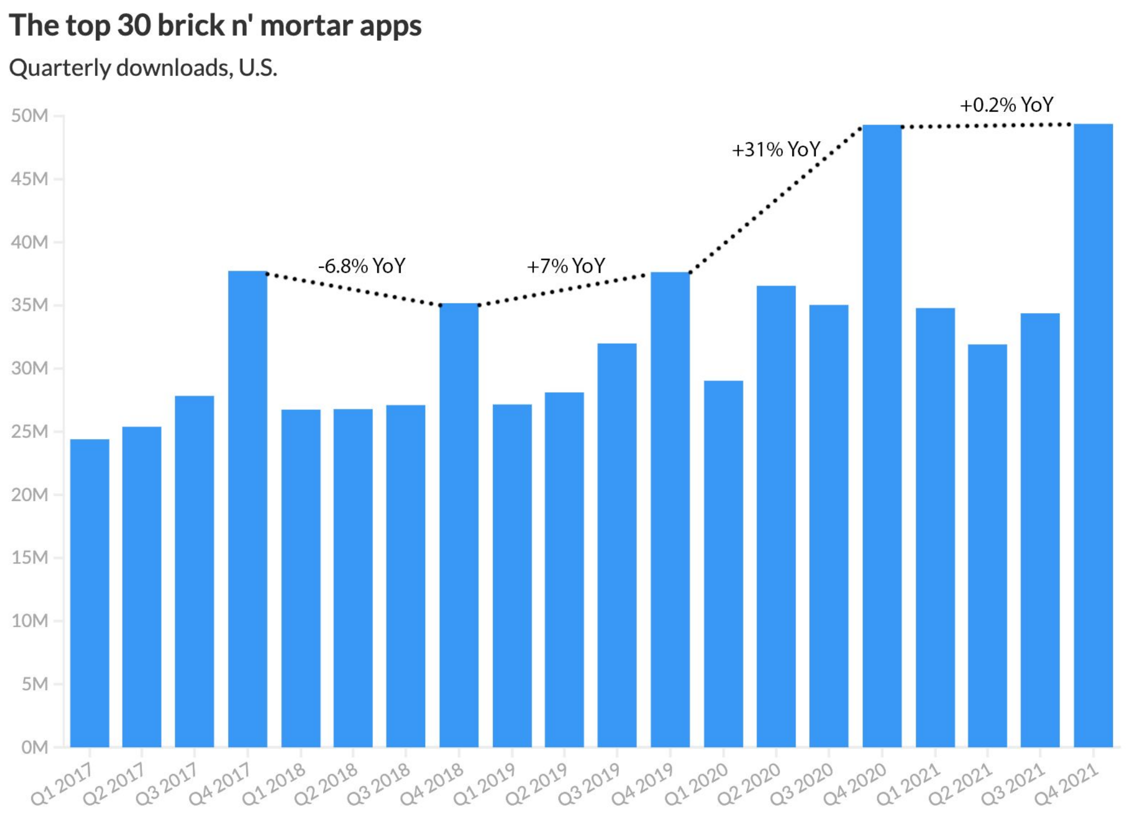


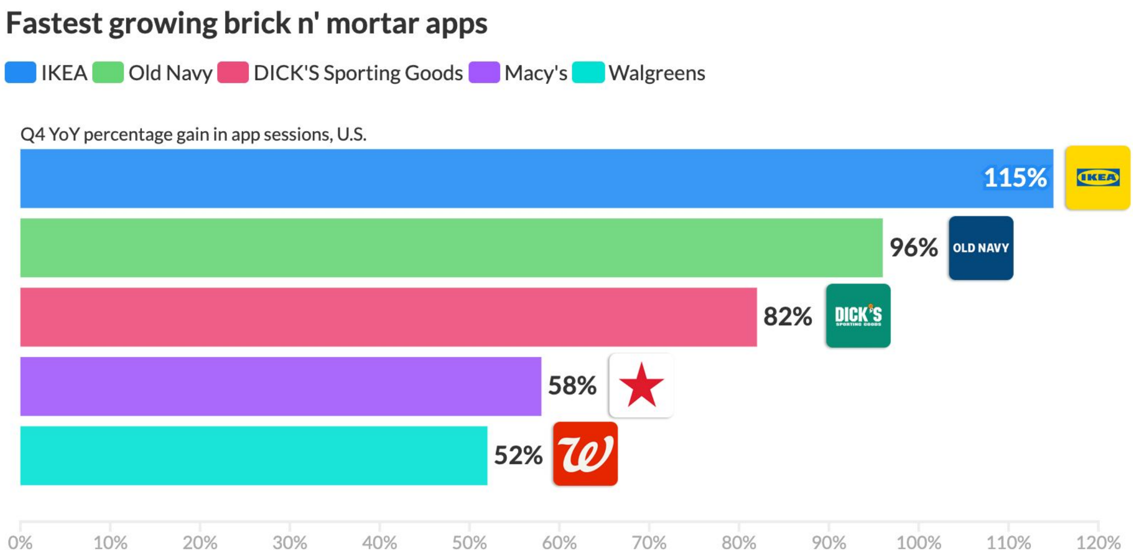
WHAT TO KNOW

For the most part, brick n' mortar retailers are not the savviest when it comes to digital because they traditionally think about physical location and store layout first.

Last year (2020) required B&M retailers, who wanted to stay competitive, get it in gear on mobile and provide features like curbside pickup.

In 2021, it looks like retailers took their foot off the gas as state government restrictions eased.

Brick n’ Mortar



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WHAT TO KNOW

The IKEA app launched in in the U.S. in Q4 2020, which is the reason for its strong growth. It has a companion app which leverages AR technology to convert more sales without having buyers go in-store.

Old Navy went all in on plus-size clothing, creating more sizes for all items offered and eliminating the plus-size section, creating more equality for shoppers in-store and online.

Dick’s Sporting Goods refreshed its app in mid-September 2021, updating its navigation and rewards management. It also enabled curbside pickup and the ability to save/favorite items.

Macy's bug squashing and added features help boost engagement

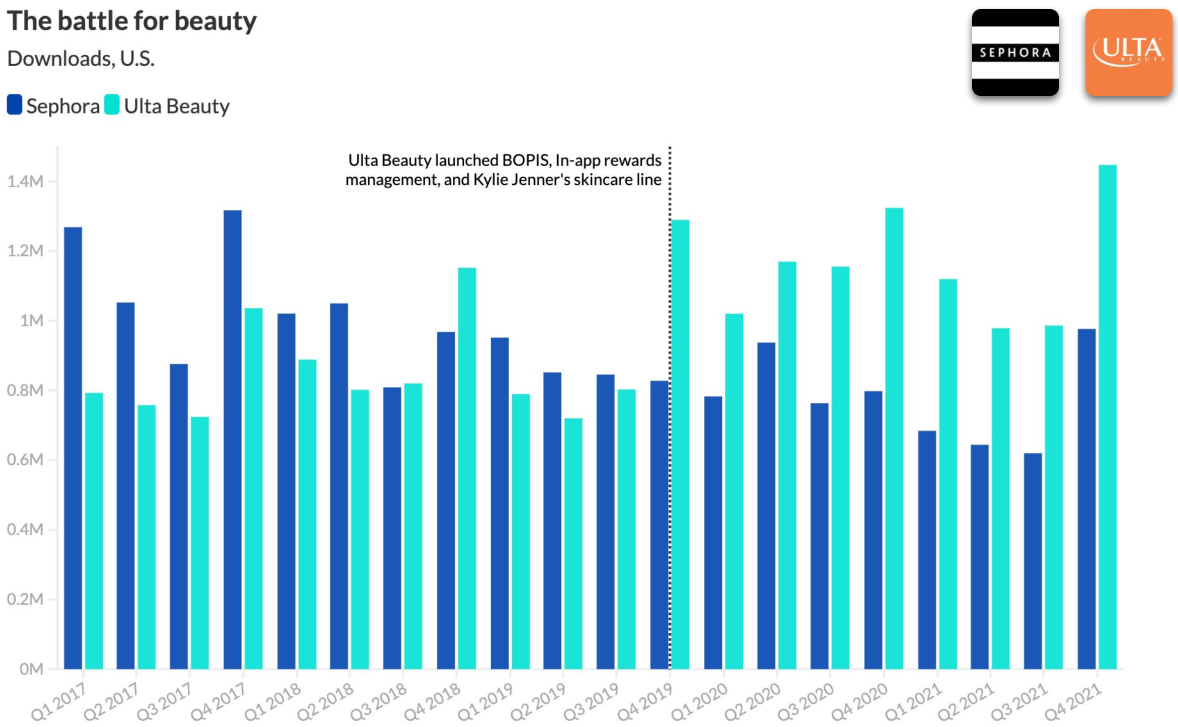
WHAT TO KNOW

Last year, Belk was the fastest growing brick n' mortar app, and this year Macy's is the fourth fastest growing app of the bunch. Dillard's launched a new app in 2021. All this is to say that traditional department stores are finally investing into digital channels like mobile.

In 2020, Macy's pushed out 13 app updates and in 2021, the retailer more than doubled that number with 28. The increase was a combination of new features and squashing more of the bugs that had previously plagued it.

Macy's made a push to get its more effective updates live before the holiday shopping season started.

Brick n' Mortar

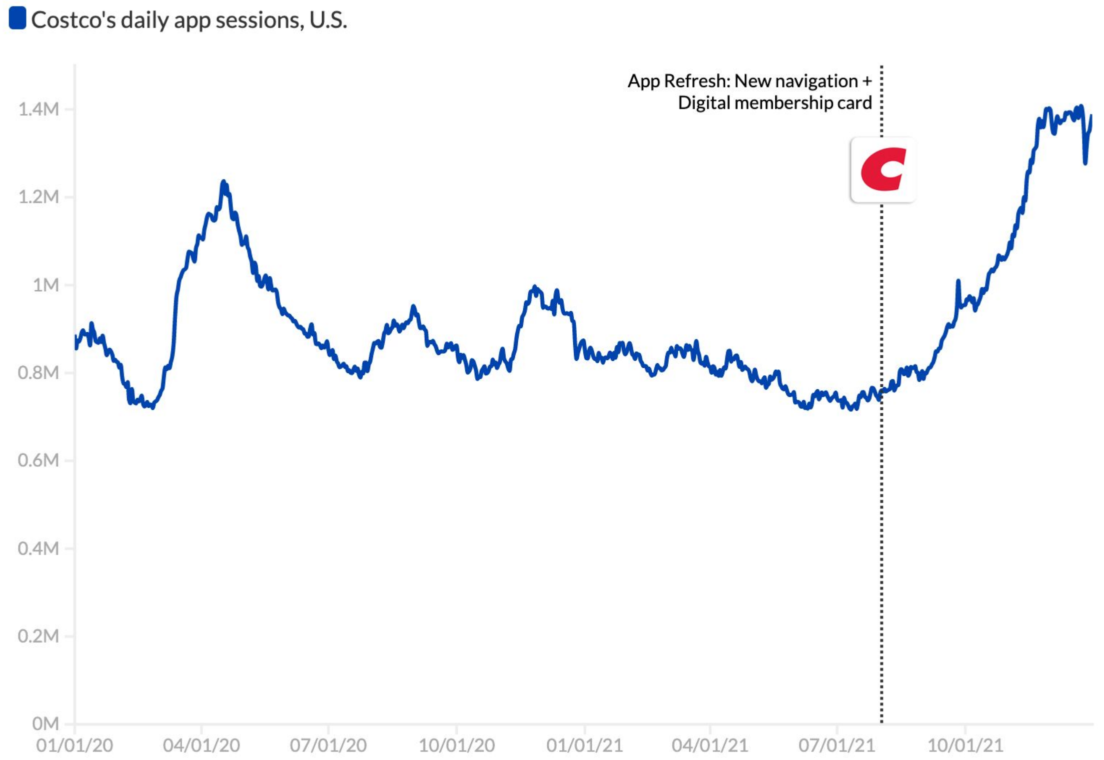


WHAT TO KNOW

Sephora launched the ability to buy online and pickup in-store in August 2020, well after Ulta Beauty had been providing the ability through its own app, and well after it became a necessary ecommerce feature.

Sephora had stronger year-over-year growth in the fourth quarter than Ulta Beauty (9.3% compared with 23.4%) but Ulta Beauty averaged 402k more quarterly downloads in 2021.

Basic updates help grow Costco app grows user sessions 37% YoY in Q4

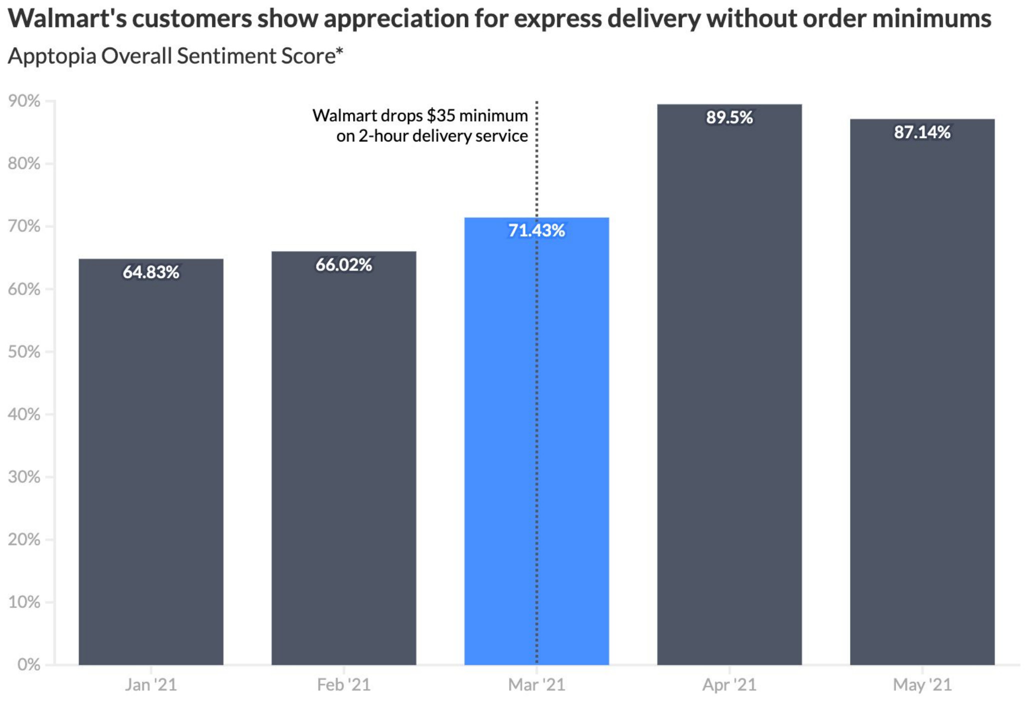


WHAT TO KNOW

Outside of Sam's Club, wholesale clubs in the U.S. have not invested in basic upkeep of, and expected features for, their mobile apps. Costco's written user reviews and 2.3 App Store rating are a perfect indicator of this.

In 2020 alone, "Sam's Club" was mentioned in more than 200 Costco app reviews, which Apptopia's natural language processing technology tagged with negative sentiment. The reviews spoke to expected features Costco's competitor already had.

In November, when Costco added the ability to view receipts in its app, the word "receipt" went from having a negative impact on user review sentiment to a positive one.



*Overall Sentiment score ranges from 0% - 100%, where 100% indicates the best positive sentiment score possible. We use a 30-day weighted moving average that takes into account several factors, including: volume of reviews, recency of reviews, ratio of positive and negative reviews.

WHAT TO KNOW

In May 2020, Walmart merged its grocery delivery app into its flagship app because, well, asking your customers to have more than one app is not ideal. In March 2021, it dropped its $35 minimum on express delivery. This resulted in a 14.6% M/M gain of new installs for the app, but it was a strong play for customer retention and brand loyalty.

Customers shared the love right back in Walmart's app reviews. **Day 7 User Retention for the app increased by 7.5% from February through May.**

04

Fast Fashion

Apps stemming from companies which specialize in producing inexpensive clothing rapidly, in response to the latest trends.

Fast Fashion

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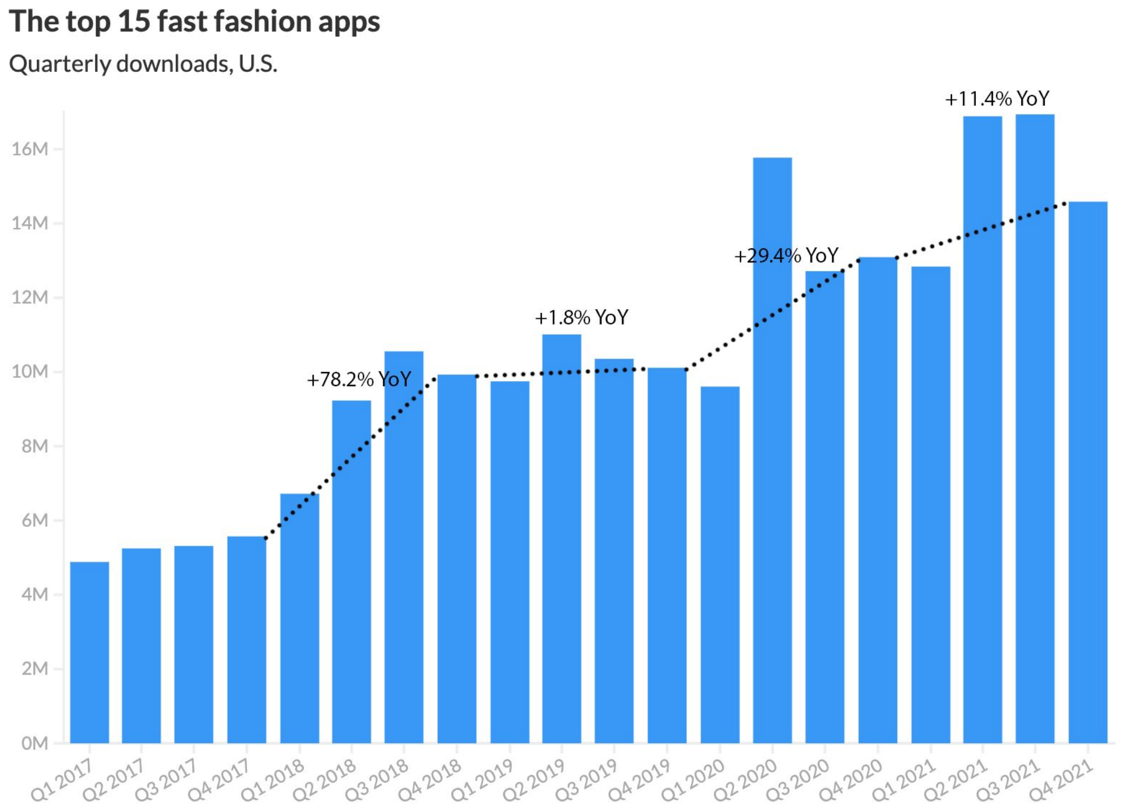

WHAT TO KNOW

Most everywhere else you look in retail, Q4 will be the best performing quarter. While fast fashion apps are growing year-over-year in the fourth quarter, Q4 is not the dominant period for this market.

SHEIN has such a large share of downloads (53% in 2021) that it significantly affects the market's performance. If SHEIN were to be removed from the chart to the left, Q4 2021 would be the first time that Q4 downloads were the highest of the year.

Still, this would be the first year which means fast fashion brands have traditionally had a tougher time competing during the holiday season.

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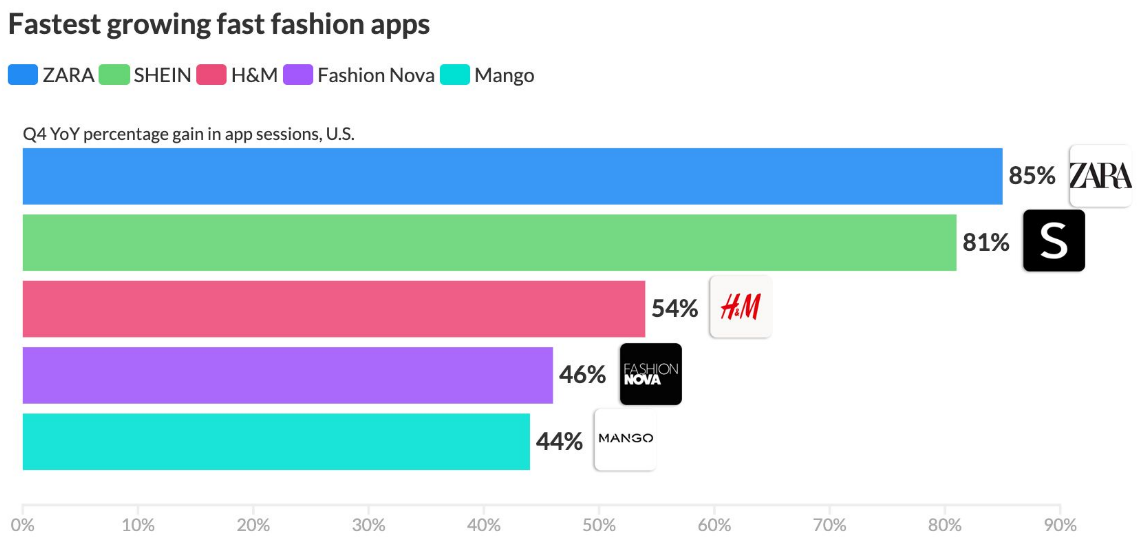

WHAT TO KNOW

While SHEIN is the largest fast fashion retailer, it is usually the fastest growing as well, but this year Zara pushed ahead.

Zara increased its annual downloads by 59% in 2021, the most annual growth the app has ever had. This was likely from paid user acquisition.

H&M increased its app updates by 31% this year, cutting down on user reviews pointing out performance and bug issues, by 42%.

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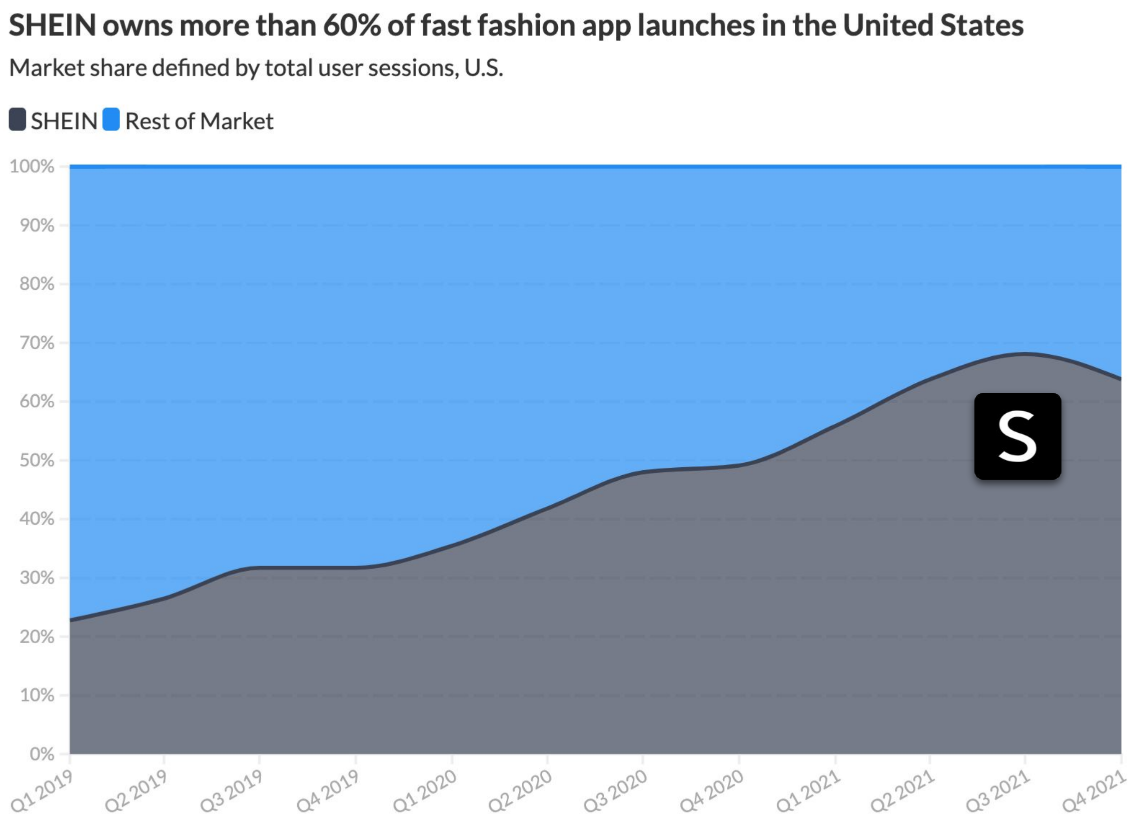

WHAT TO KNOW

SHEIN is so far ahead of its direct competitors that it's difficult to even compare them. In 2020, SHEIN launched a beauty brand called SheGlam. Last year, the app expanded into pet products and announced it's dipping its toes into higher-end fashion.

Outside of its physical products, SHEIN also offers something that many retailers do not; a fashion community. The app live streams events (like its SHEIN Together Fest, featuring Katy Perry, Lil Nas X and Nick Jonas), offers styling recommendations, and supports indie fashion designers through SHEIN X. By supporting clothing designers, content creators, and musical artists alike, SHEIN has positioned itself as a dominant force in both the fashion industry and the creator economy.

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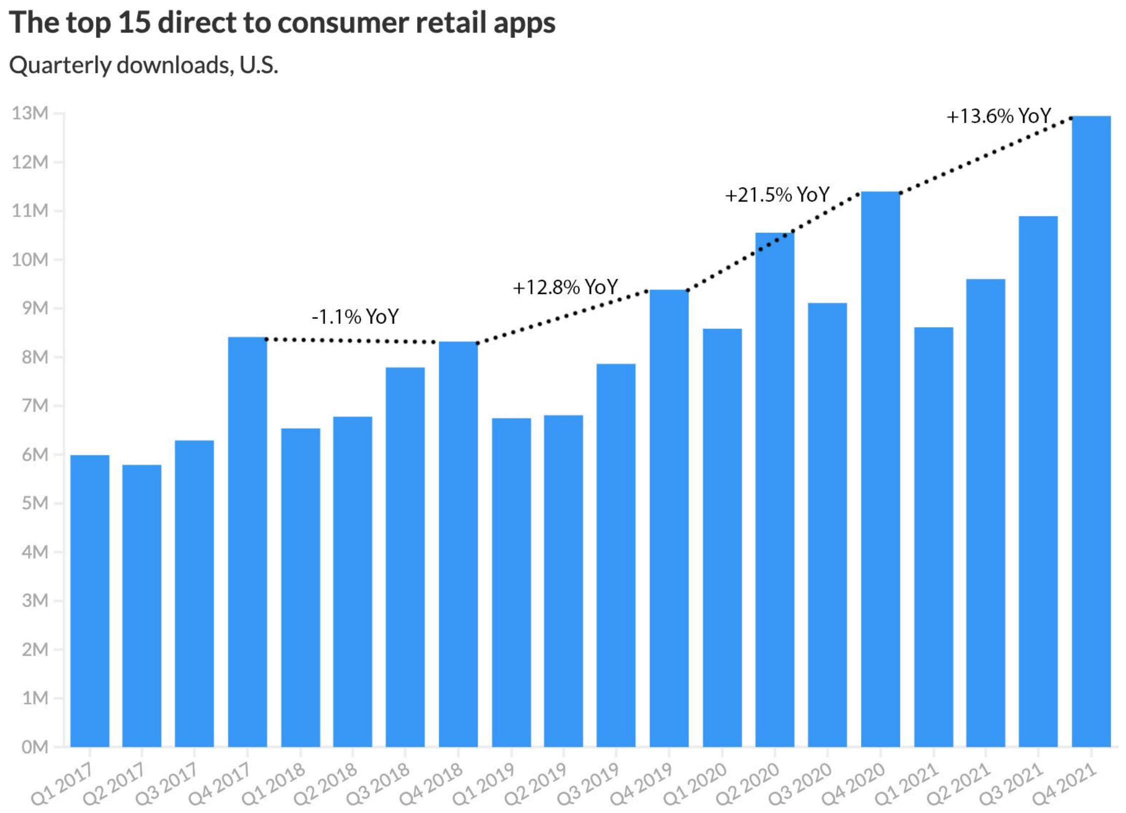
05

Direct to Consumer

Brands that sell directly to their customers through their digital properties and sometimes physical locations.

Direct to Consumer

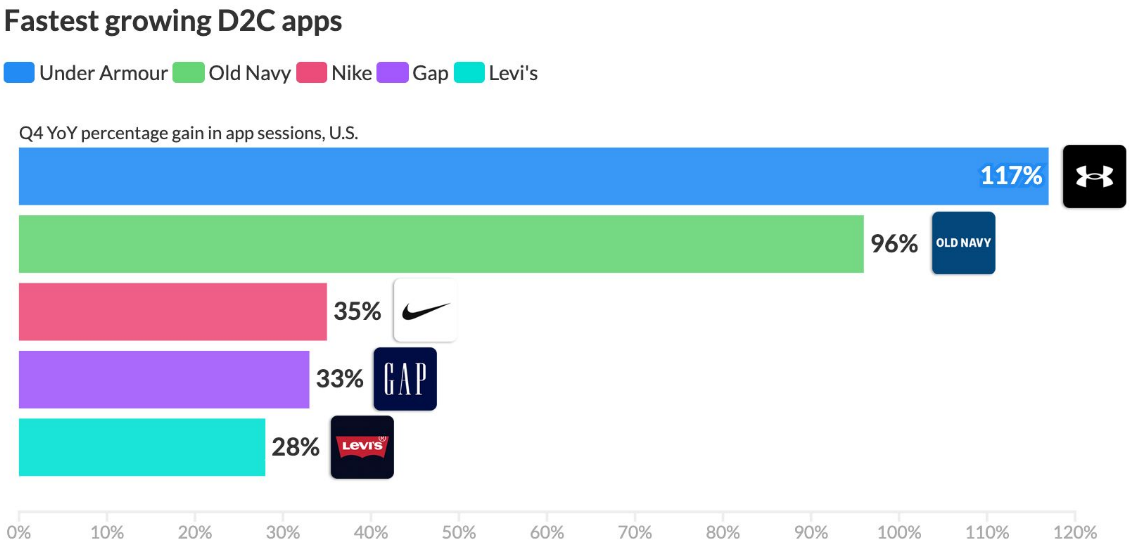


WHAT TO KNOW

The top direct to consumer apps have grown new users year-over-year in the fourth quarter for three years in a row.

Athletic brands such as Nike, Adidas and Lululemon have played an integral role in this growth. They've long paid attention to the importance of the data that having a digital presence can provide, along with having real estate on shoppers' mobile phones. Think of when Asics bought Runkeeper or when Under Armour bought MyFitnessPal.

Direct to Consumer



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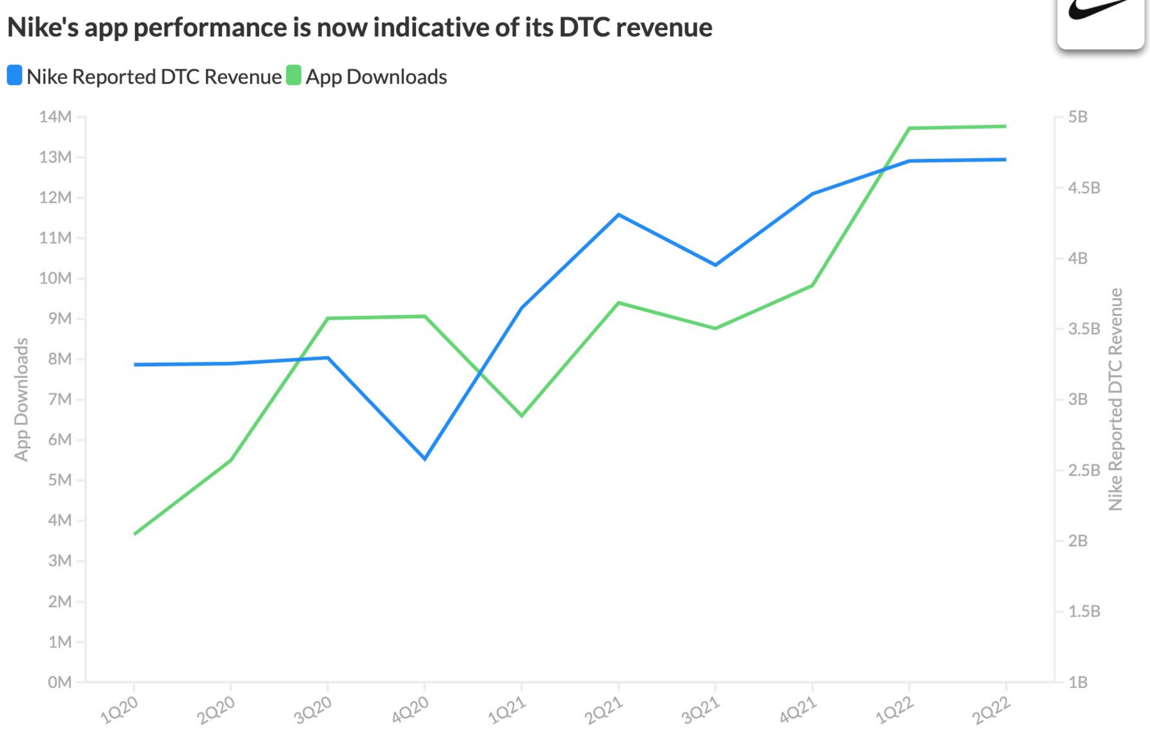
WHAT TO KNOW

Usage of Under Armour's app took off in May as Apptopia's X-Ray dataset indicated the launch of a sharing feature. Product Share, as the company calls it, provides functionality to share content with others on social media.

Old Navy went all in on plus-size clothing, creating more sizes for all clothing offered and eliminating the plus-size section, creating more equality for shoppers in-store and online.

The Gap's user sessions started to heat up in September, shortly after Kanye West started releasing clothing items from his Yeezy line on Gap's digital properties.

Direct to Consumer



WHAT TO KNOW

Nike was able to capitalize on changes in consumer behavior brought about by the pandemic. Going direct to the customer has been paying off.

The company did a lot of work transitioning a large portion of its marketing and sales to digital during the pandemic, generating loads of new mobile app users.

At a certain point (2Q21), downloads of the Nike app started to correlate highly with its direct to customer revenue.

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06

Consumer-to-Consumer Marketplaces

Marketplaces where the products can be sold by anyone to anyone, and are not necessarily from corporate entities.

C2C Marketplaces

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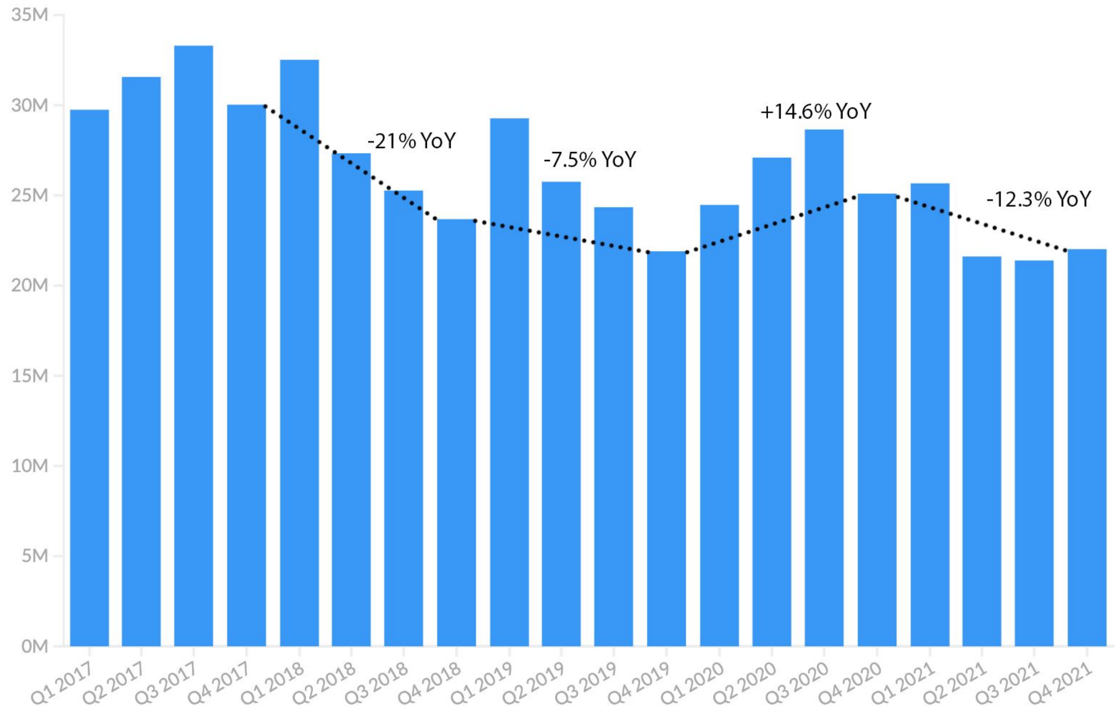
The top 15 consumer to consumer marketplace apps

Quarterly downloads, U.S.



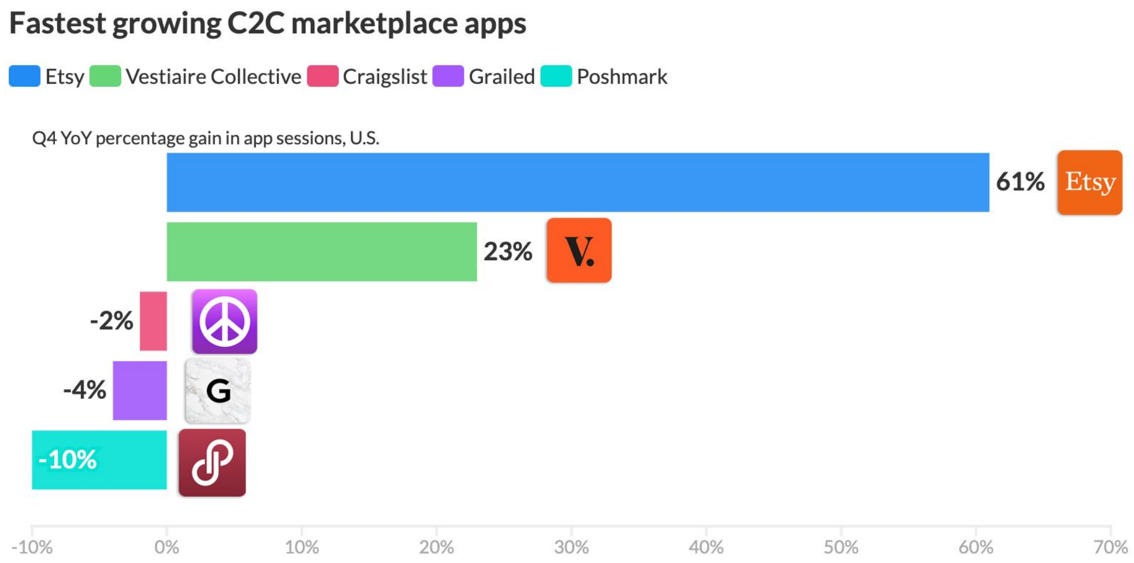
WHAT TO KNOW

This market has been sliding but it's unclear why. There is the potential that buy now, pay later apps have made installment payments so easy that less shoppers are price-conscious.

The fourth quarter tends to be the low quarter for the grouping as deals/sales from top retailers are tough to beat.

There was an uptick in 2020, likely due to an influx of sellers who needed income after being laid off from work.

C2C Marketplaces



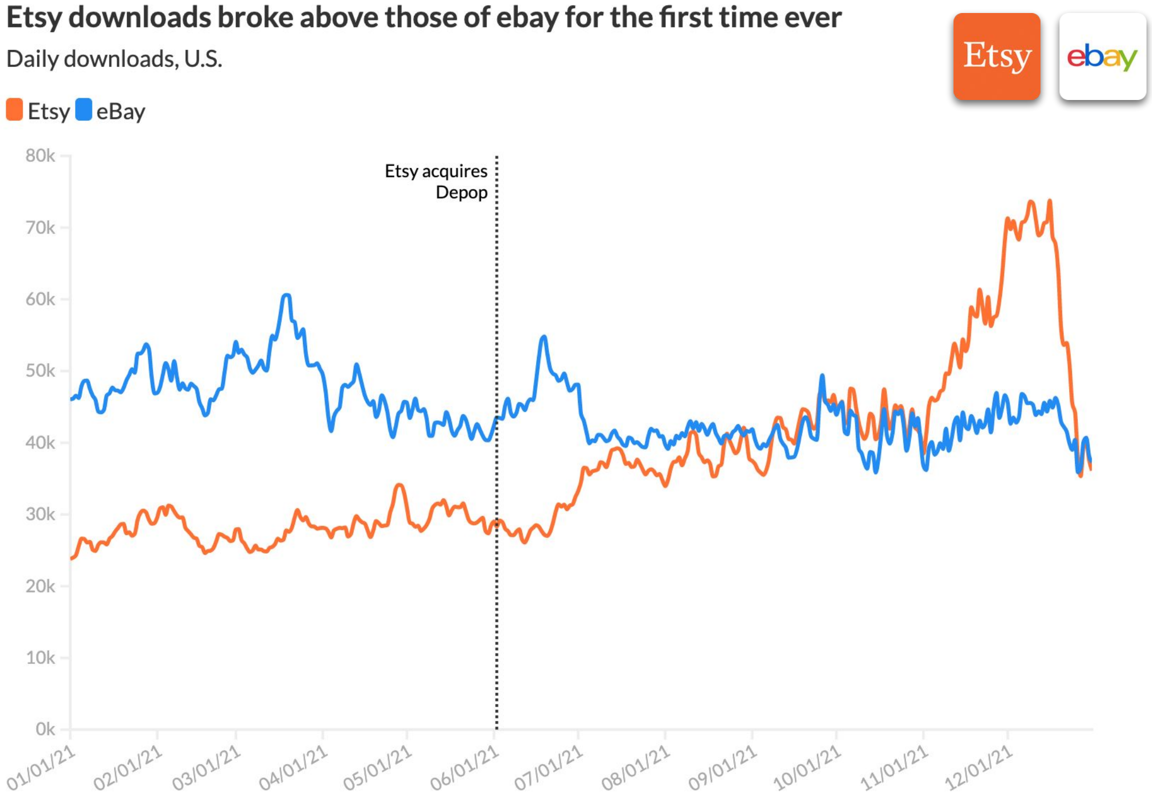
WHAT TO KNOW

Three of the fastest growers did not actually grow, so Etsy (see next page) and Vestiaire are exceptional in this regard.

Vestiaire is a reseller marketplace devoted to designer fashion. The app launched a handful of updates in Q1 2021 which helped boost performance all year long:

- Added 80 payout currencies
- Added Venmo and Visa Direct as checkout options
- Decreased payout wait times for sellers
- Created a more intuitive payments interface for sellers

C2C Marketplaces



WHAT TO KNOW

Etsy acquired a fellow C2C marketplace in Depop, which caters to a younger audience, often selling via social media. While the timing lines up, this is not the likely reason why Etsy became a highly sought after shopping app.

This past holiday shopping season was somewhat marred by supply chain issues. Etsy doesn't rely on cargo ships full of containers to move goods, and so consumers realized they have a greater chance of receiving their gifts on time from smaller sellers. While eBay can have some of this allure as well, the platform has a greater number of large companies selling products, as opposed to individual sellers.

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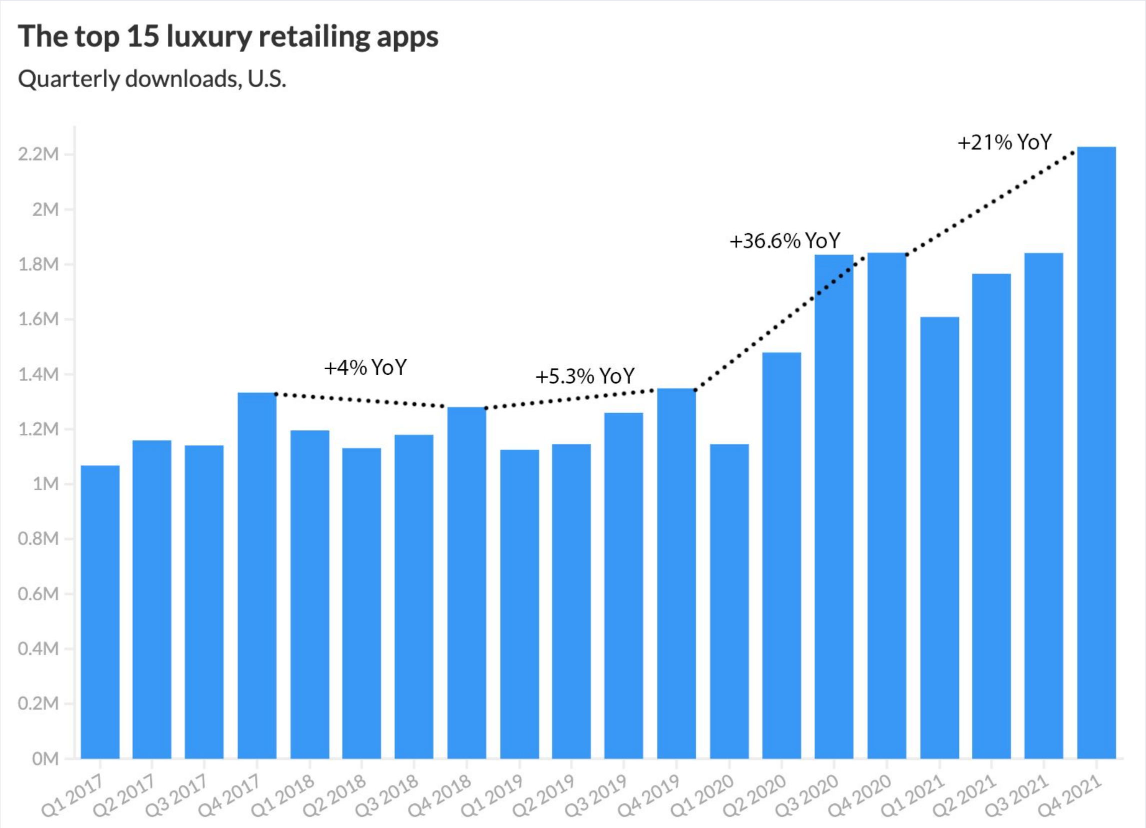
07

Luxury

Retailing companies specializing in selling clothing and/or accessories from luxury clothing brands. Consumer to consumer marketplaces specializing in luxury are not included.

Luxury



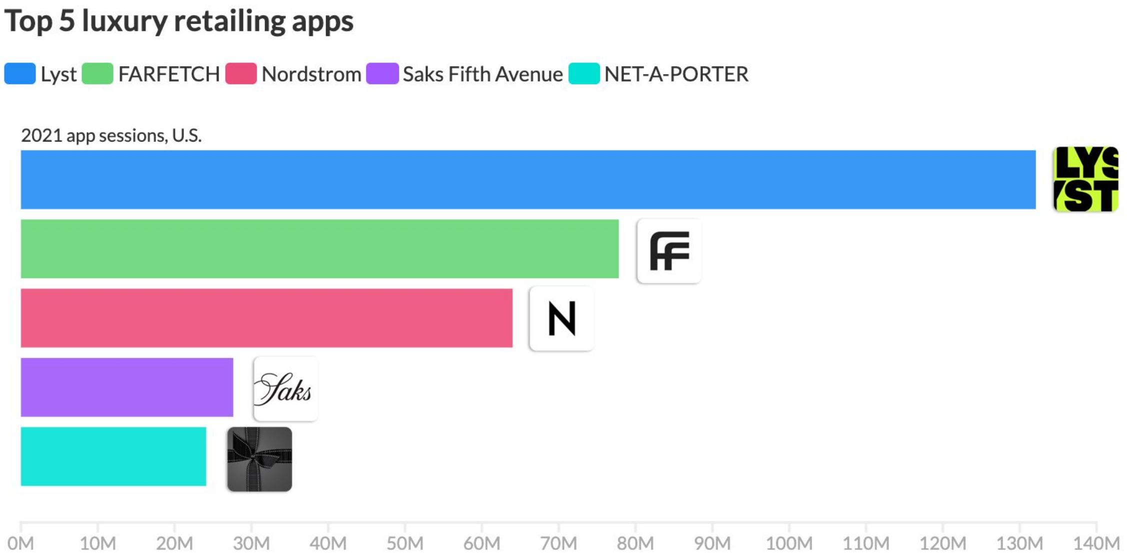
WHAT TO KNOW

Luxury shopping has typically been something done in-person and rightfully so. You can imagine wanting to try items on before you spend a lot of your hard earned dollars on them.

Like retail in general, the pandemic changed where shopping happens, which forced retailers to invest into their digital channels for selling.

Another school of thought surrounding the boost in luxury shopping is a little bit of retail therapy to help out the quarantine blues.

Luxury



WHAT TO KNOW

Lyst tackles FOMO (fear of missing out) head on by enabling shoppers to get sales notifications for brands they care about, and receive personalized recommendations based on their favorited items.

The company just launched an Android version in November, which has been excluded from our data findings.

Nordstrom also had a good year after enabling guests (those not logged into profiles) to checkout via PayPal.

Apptopia is the leader in real-time competitive intelligence

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Industry Agnostic

Trusted by more than 100,000 publishers worldwide

We enable brands to analyze critical competitive signals across mobile apps & connected devices.

Data on over 7M+ apps

Coverage in over 60 countries

Data Points

- Downloads
- IAP Revenue
- Daily Active Users
- Monthly Active Users
- Avg. Sessions Per user
- Total # of Sessions
- Avg. Session Length
- Total Time Spent In App
- SDK installs/uninstalls
- Demographics
- Cross-app usage
- Feature tagging
- User reviews

Data Granularity

- App
- Store
- Day
- Country

Products & Solutions

Performance intelligence on 7M+ Apps

Downloads, revenue, and usage estimates for over 7M+ apps

Review Intelligence

Natural language processing extracts insights from over 1.5 billion user reviews

SDK Intelligence

SDK install/uninstall data on over 6M+ apps & over 2,900 SDKs identified

Actionable Insights

Audience Intelligence

Demographic insights on over 1.8M apps

Search Intelligence

ASO tools and insights to power keyword research and organic downloads

Product Intelligence

Bone-deep product insights into every app and mobile game

Our Data

Collect

Where does the data come from?

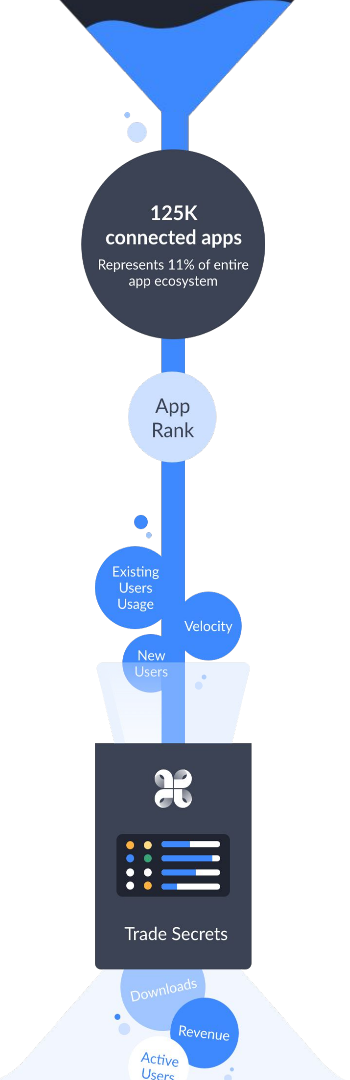
Combining the analytics dashboards for over 125K+ apps with our advanced models, we provide the most reliable estimated data for more than 7 million apps. Over the past 8 years, we have ethically sourced our data without relying on panel data, allowing us to provide the most accurate estimated mobile data without compromising our integrity.

Transform

How is that turned into useful data?

An app's rank is derived from the velocity of new users and existing users' usage. By reverse engineering apple and google's ranking algorithms, we are able to get download, revenue, and usage data for every app in the world.

We also use Trade Secrets to derive usage signals from the metadata of an app such as category, ratings, reviews and release notes.



You can find more information on how we collect data and create our models here: Part 1 and Part 2. Visit our compliance page here.