



Q2 2015 INDONESIA MOBILE DATA REPORT

Based on MoboMarket user data research



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- How many apps do users update?
- What type of apps do users update?

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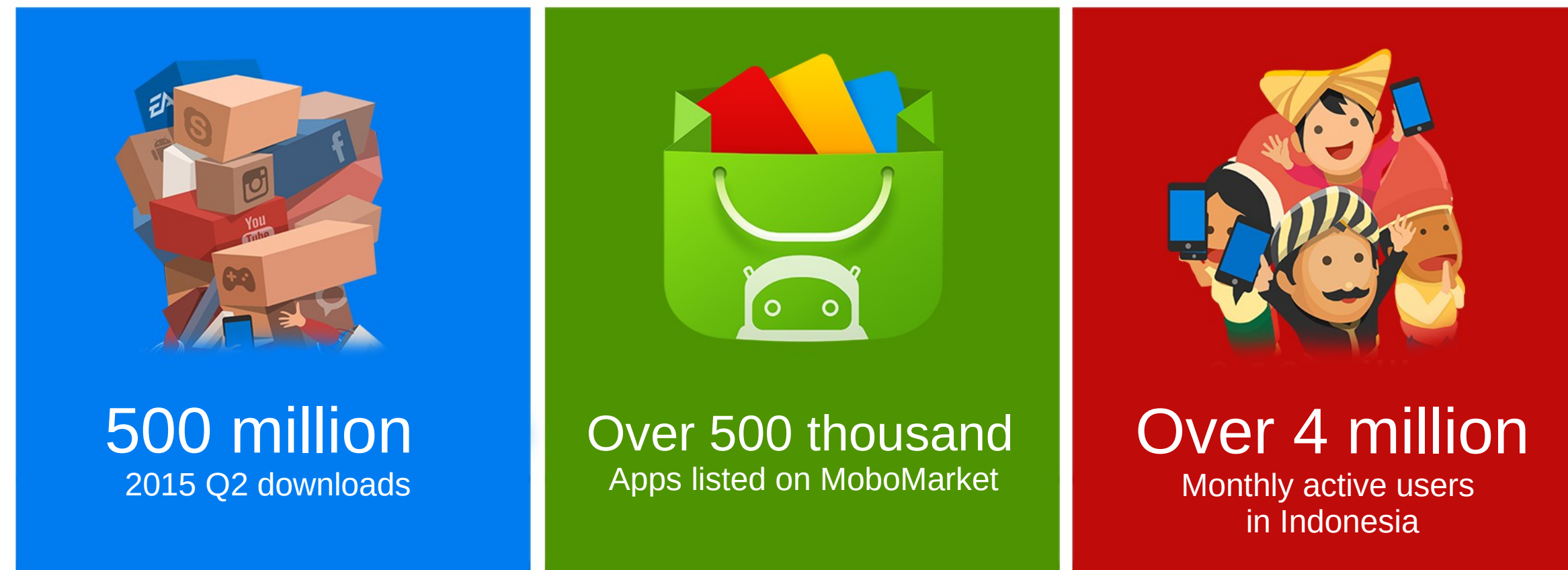
Overview

- Research background and data sampling
- Main conclusions

Research background and data sampling

■ Based on MoboMarket Indonesian user data

MoboMarket is an Android app store developed by Baidu, and introduced to the Indonesian market in February, 2014. Currently, it has one of the largest download quantities of any third-party app store, with millions of regular users worldwide. MoboMarket is an industry pioneer in its implementation of a point exchange system which accomodates local payment habits and preferences in Indonesia. In terms of app downloads, MoboMarket includes a download pause function in order to help users manage their mobile data traffic usage, which is of specific concern in Indonesia and in other emerging markets.



■ The purpose of this research:

1. To gain insight into the current app market situation and trends in the mobile market in Indonesia.
2. To provide a comprehensive picture of mobile user behavior in Indonesia and in other emerging markets.

■ Data updated as of June 2015 (6.73 million samples).

Main conclusions

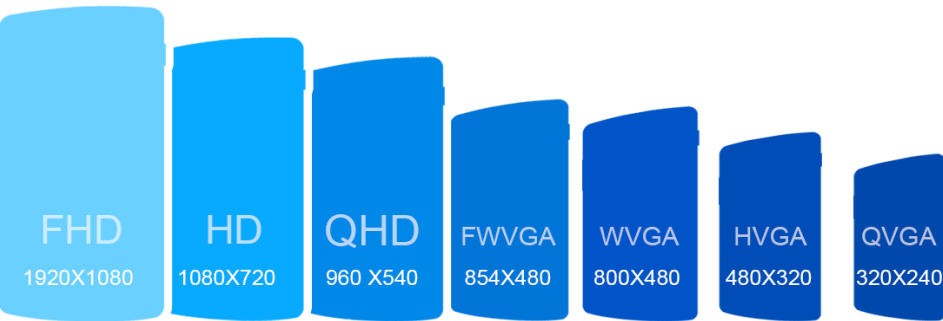
- The most common phone resolution type is still WVGA, accounting for 32.93% of the total market share in Indonesia. The percentage of higher resolution phones (FWVGA~FHD) increased from 23.34% (2015 Q1) to 26.89% (2015 Q2).
- There were few changes in user network distribution, and the share of 3G users remained stable at around 60%.
- The search browsing to download conversion rate was 22.98% higher than the list browsing to download conversion rate. App users tend to do a precise search for what they want.
- The top 20 search terms are mainly in social media, popular games and photography.
- Saturday is the day with the highest download activity, especially for game downloads.
- Users are very welcoming of all kinds of apps for children and tourism. We observed that users are eager to try all available apps in these categories, and don't want to miss a single one of them.
- 16.67% of users download apps on a daily basis. On average, each user downloads 0.65 app per day. The 3 highest groups are gamers, social media users and tool enthusiasts. Within the games category, casual games were downloaded at the highest percentage.
- Social, tools and strategy apps make up a higher percentage of downloads, as these categories belong to the red ocean market category (established markets). Lifestyle, personalization and simulation apps belong to the blue ocean market category (uncontested markets).
- 4.97% of users update their apps on a daily basis. On average, they update 0.17 apps per day, which demonstrates that users are not particularly willing to update their apps. Social apps outperformed other categories in terms of updates, thus demonstrating a long lifespan in social apps. On the other hand, games exhibited a rather short life span.



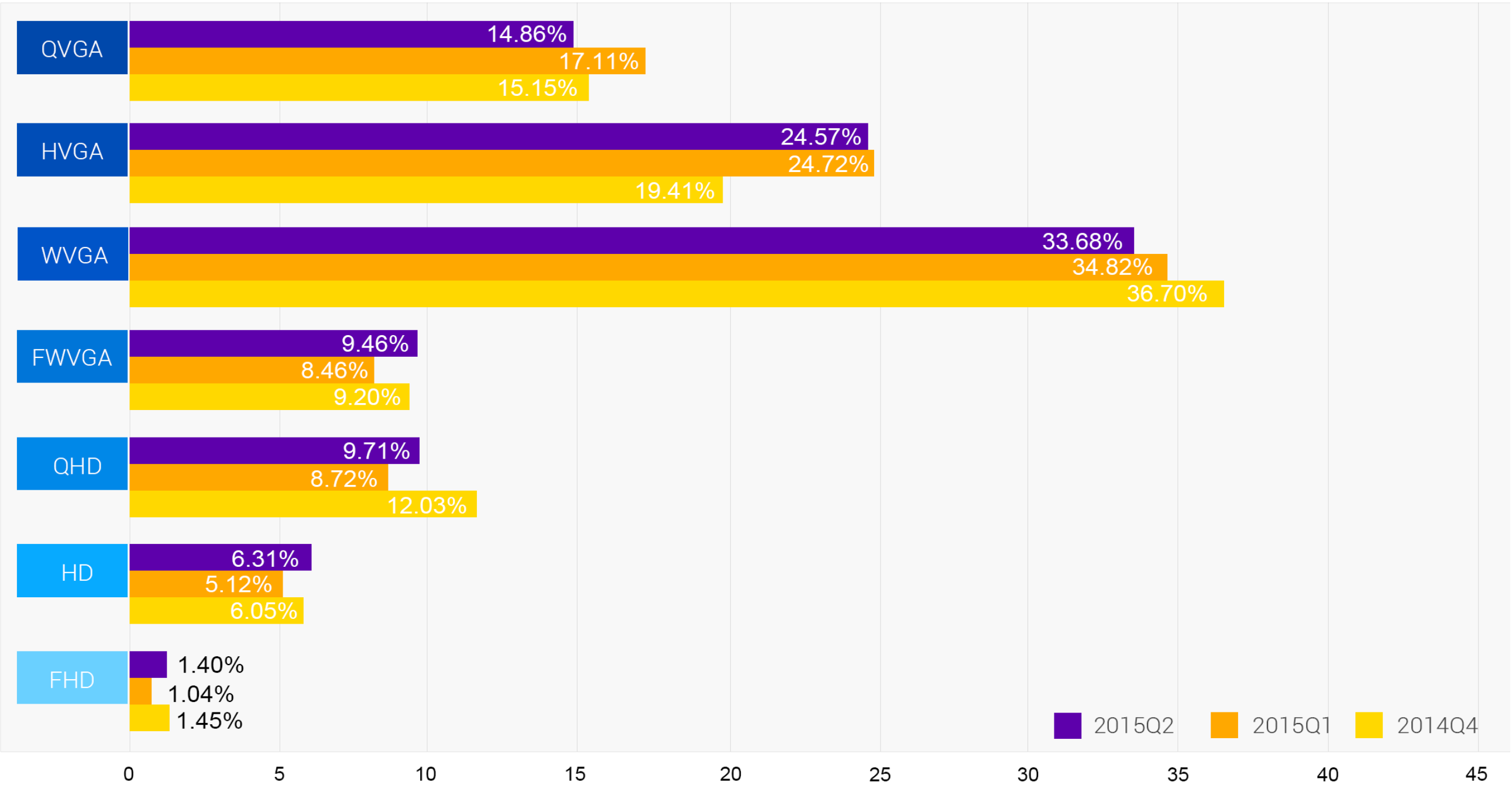
Device market analysis

- Changes in mobile phone screen resolution
- Mobile users network breakdown
- Android version distribution

Changes in mobile phone screen resolution



- The most common phone resolution type is still WVGA, accounting for 32.93% of the total market share in Indonesia.
- The percentage of higher resolution phones (FWVGA~FHD) increased from 23.34% (2015 Q1) to 26.89% (2015 Q2).



Mobile users network breakdown

There were few changes in user network distribution, and the share of 3G users remained stable at around 60%.

	2014Q4	2015Q1	2015Q2
	26.35%	27.69%	28.30%
	62.63%	61.16%	59.08%
	11.03%	11.15%	12.61%

Android version distribution

There was a significant increase in the percentage of people using a higher version of Android. In 2014 Q4, 80.10% of people used lower than version 4.4, and this percentage dropped to 59.20% in 2015 Q2. However, 15% of the market share is still using version 2.X. It is thus still important to consider compatibility for lower OS versions when developing apps.

	2015Q2	2015Q1	2014Q4
2.2	0.78%	1.10%	1.20%
2.3	14.26%	17.64%	16.20%
3.0-3.2	0.08%	0.07%	0.09%
4.0	4.74%	5.66%	7.49%
4.1	11.63%	12.51%	17.77%
4.2	24.94%	29.89%	33.08%
4.3	2.77%	3.27%	4.27%
4.4	39.88%	29.68%	19.81%
4.5	0.00%	0.00%	0.00%
5.0+	0.91%	0.18%	0.07%



Search behavior analysis

- Search and downloads are continuously growing
- App seekers tend to do a precise search for what they want
- Top 20 popular search terms

Search and downloads are continuously growing

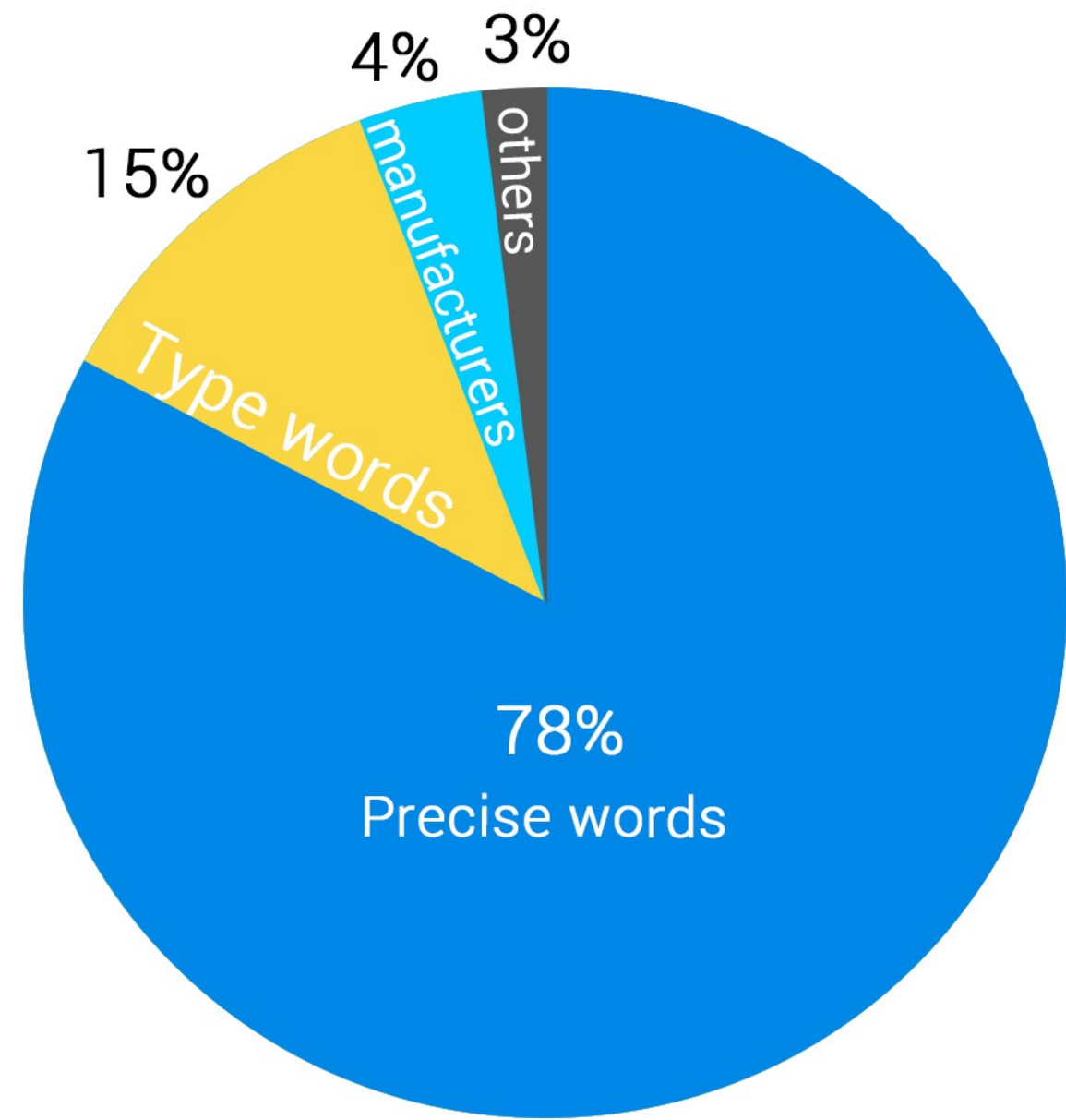
- The search-browsing-to-download conversion rate was 22.98% higher than the list-browsing-to-download conversion rate.
- Key takeaway: The search feature is important to users. Mobile app developers should have a very accurate description of their app's name, details and classification.

Mobile internet user search and download percentage	
2015Q2	34.76%
2015Q1	34.18%

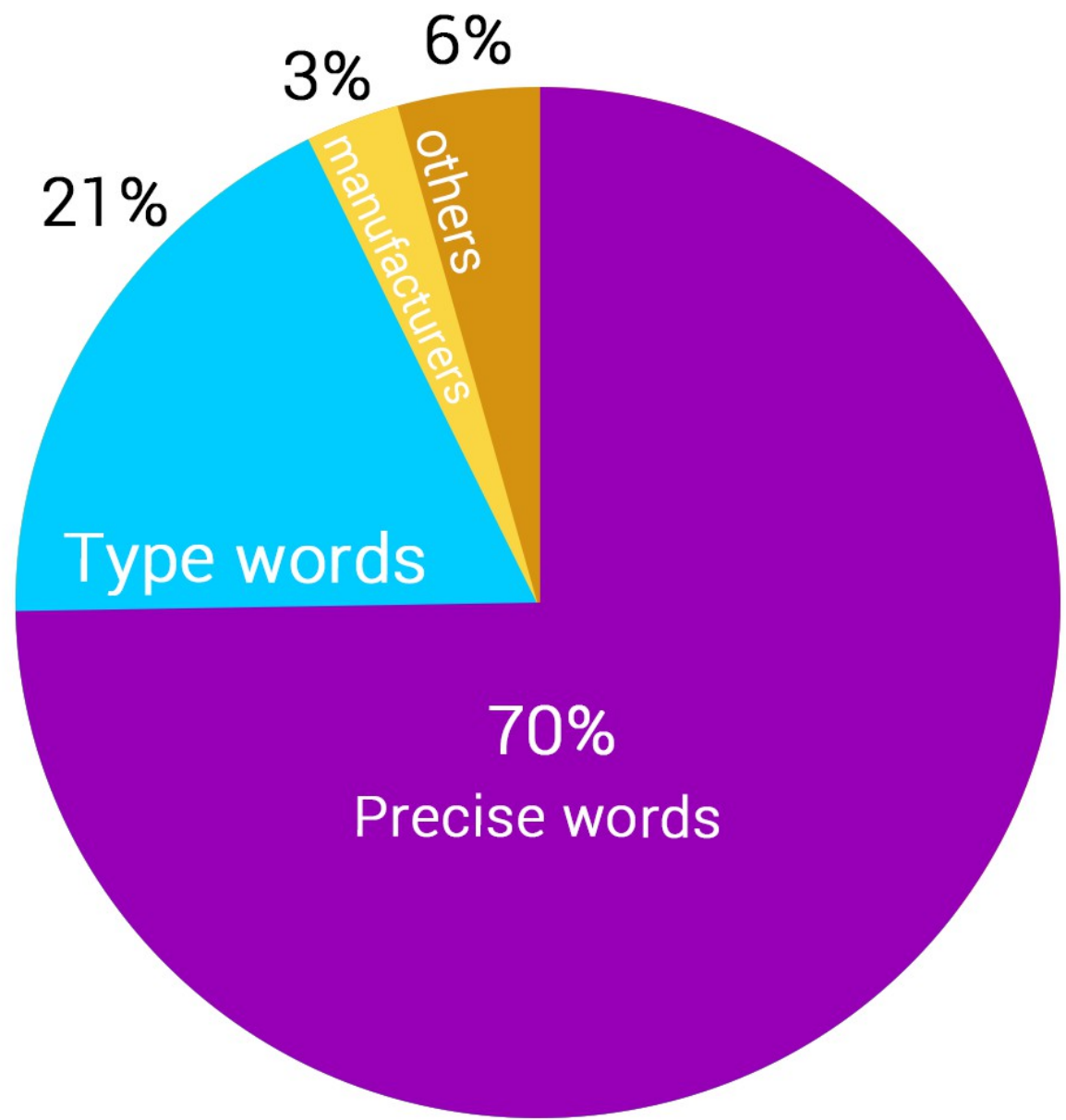
search browsing conversion rate	59.35%
list browsing conversion rate	36.37%

App seekers tend to do a precise search for what they want

The majority of user search terms are for precise words. They search for exactly what they're looking for. Comparing the search habits of users looking for games versus other app categories ("App seekers"), users searching for games will search for a greater variety of words, while app seekers tend to do a more precise search.



App seekers
Top 500 search terms by term type



Game seekers
Top 500 search terms by term type

Notes: Precise words: BBM, Facebook; Types words: Single games, video; Manufacturers: Baidu, Google.

Popular search terms

The top 20 search terms are mainly for apps in the categories of social media, popular games and photography.

Popular search word

1



bbm

2



line

3



facebook

4



coc

5



game

6



pou

7



naruto

8



b612

9



camera

10



opera mini

11



dubsmash

12



minicraft

13



tema

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web toon

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instagram

16



play store

17



go keyboard

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camera 360

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gta

20



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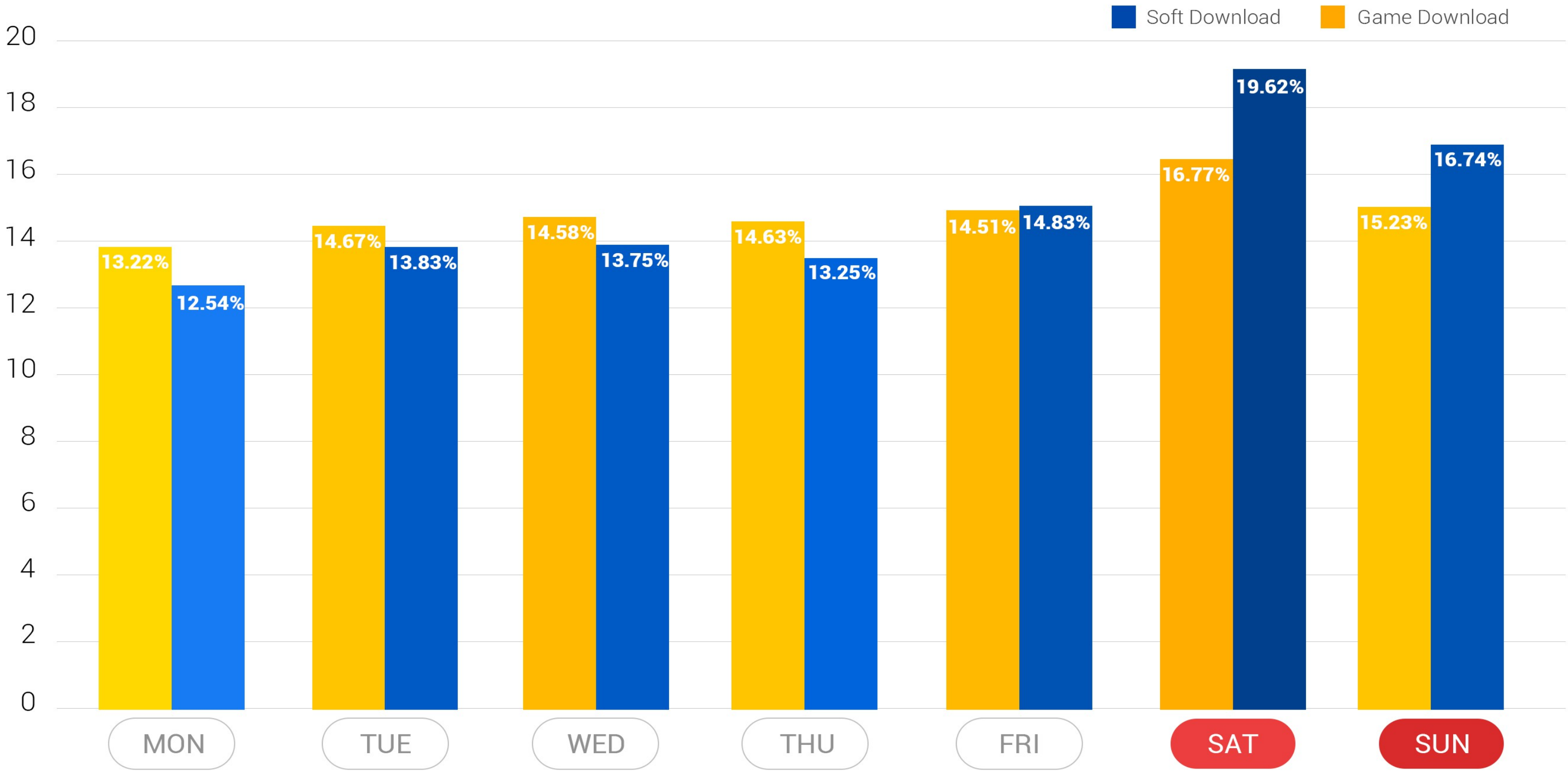
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Download behavior analysis

- Popular download days
- Download quantity
- Infographic of mobile Internet users interests/habits
- Game types downloaded
- Top 200 most downloaded new apps
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Popular download days

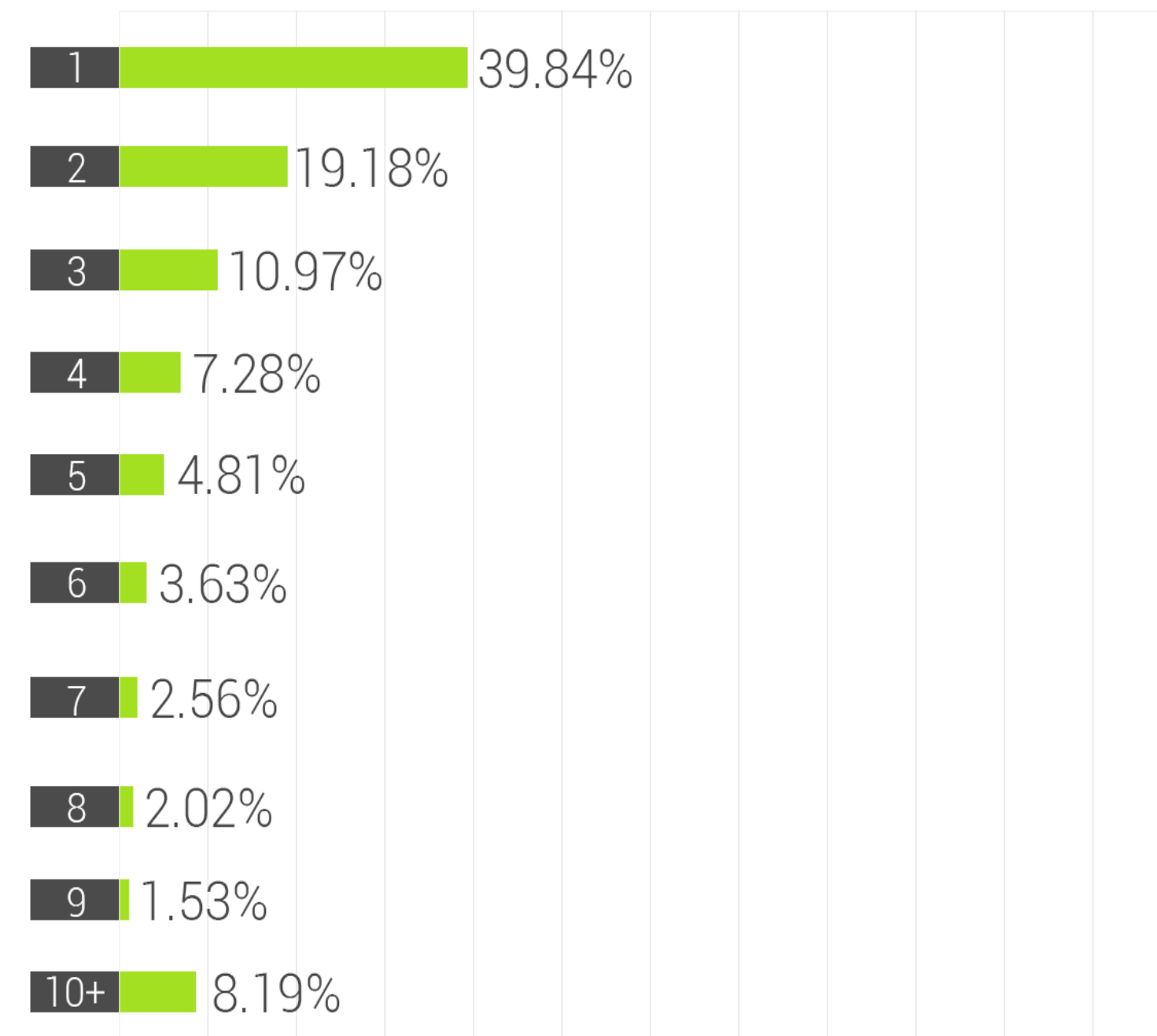
● Saturday is the day with the highest download activity, followed by Sunday.



Download quantity

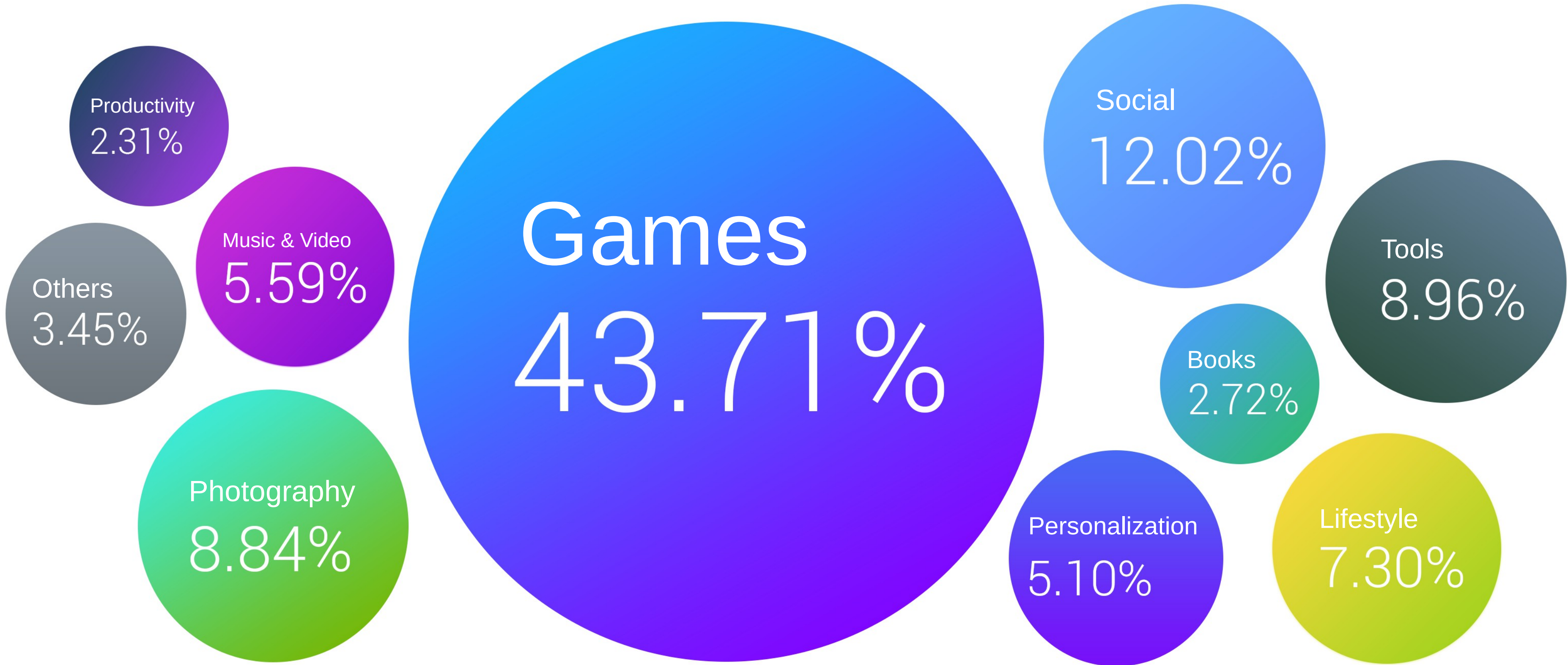
- 16.67% of users download apps on a daily basis.
- On average, each user downloads 0.65 apps per day.
- There is a large discrepancy in the number of apps individual users download per day. 39.84% of users download 1 app per day, while 22.73% of users download 5 or more apps per day.

app daily download number



Infographic of mobile Internet users' interests/habits

This user habits Infographic was compiled using MoboMarket's app tags and user download data. The 3 largest groups are gamers, social media users and tool enthusiasts. If promotion channels are made to target specific groups, not only will this reduce developers' promotion costs, but it will also achieve greater efficiency by allowing developers to make the best use of their resources.

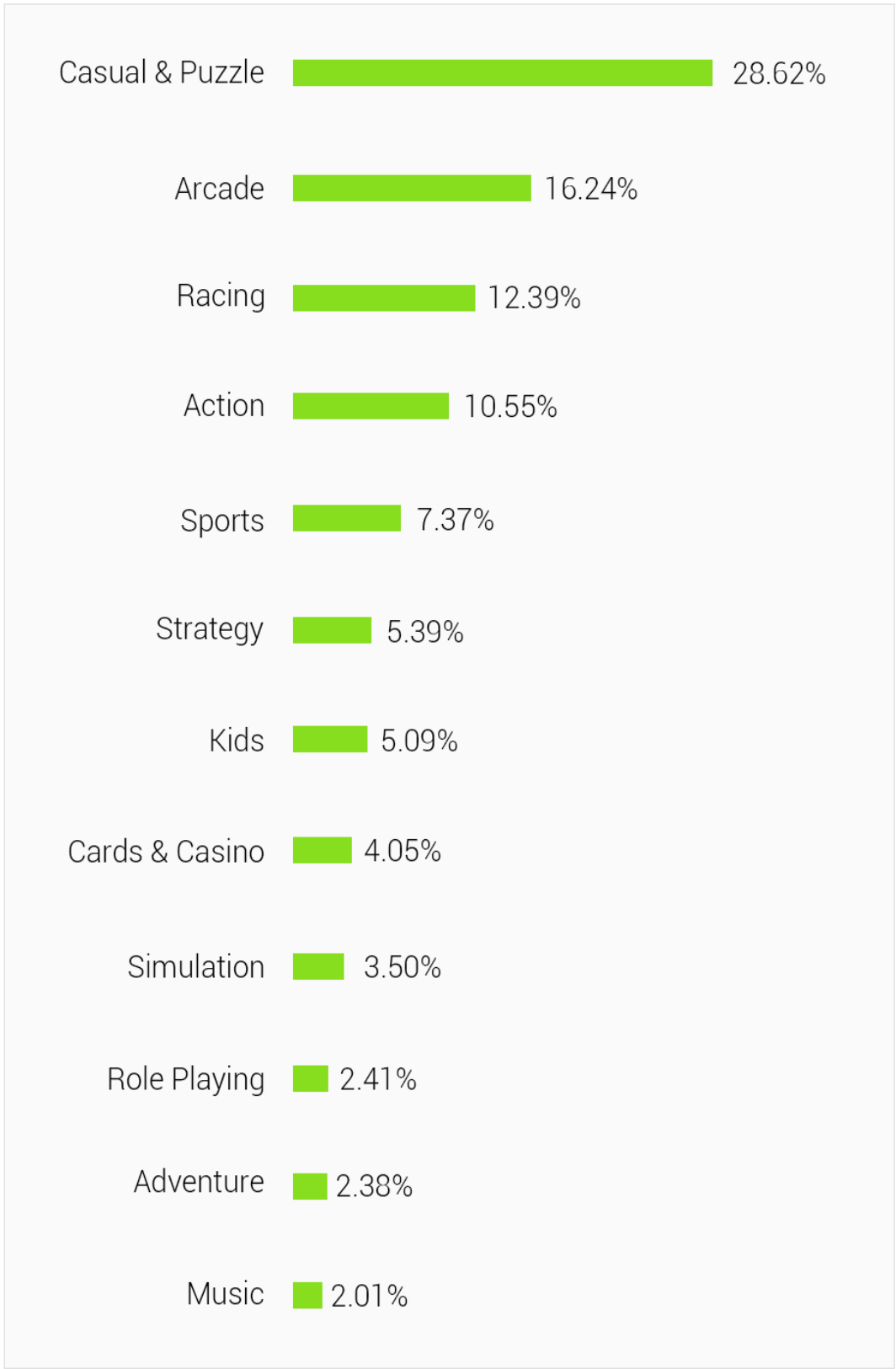




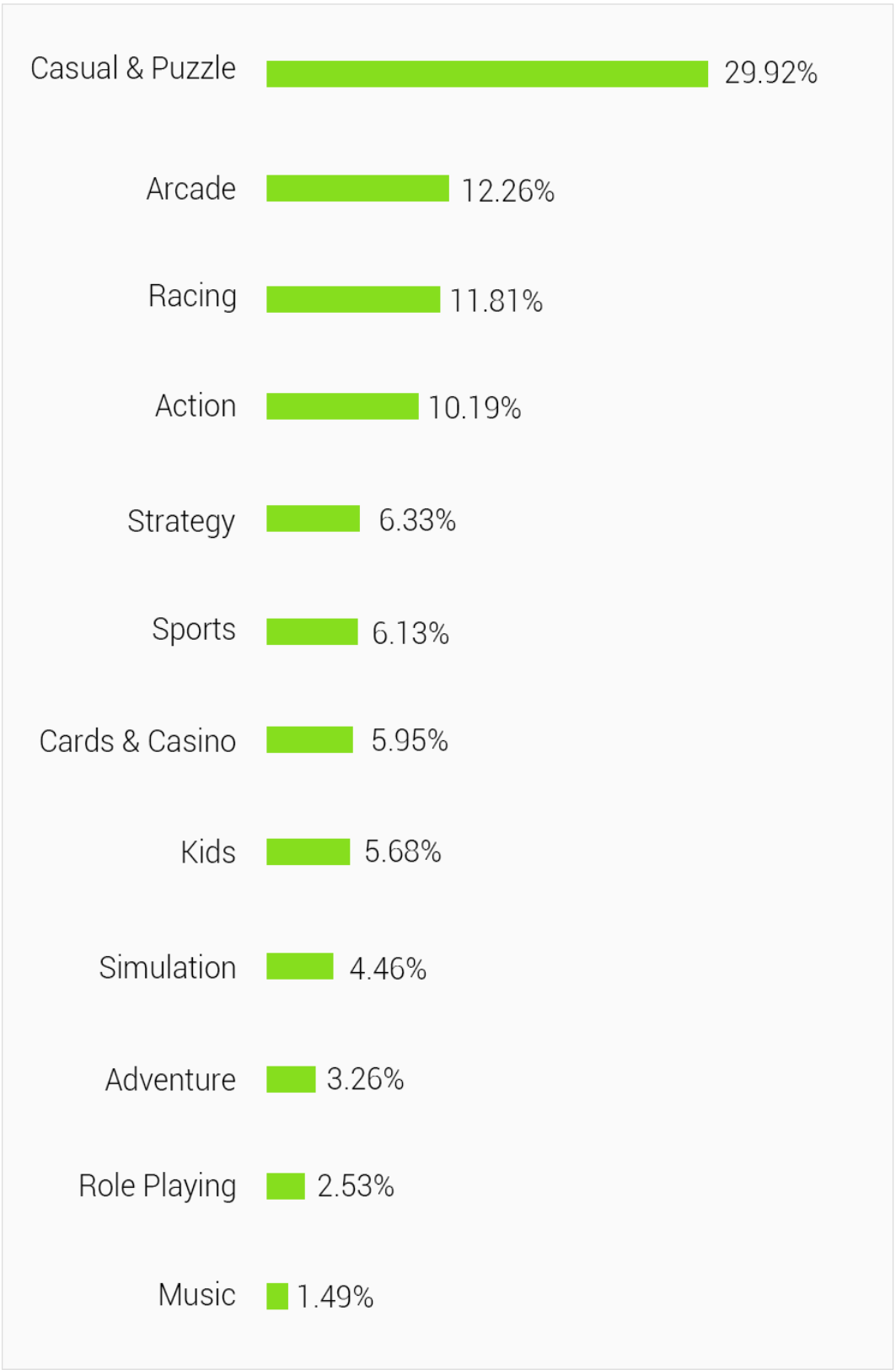
Game types downloaded

Users mainly downloaded games in the Casual & Puzzle category, as well as games in the Arcade and Action categories.

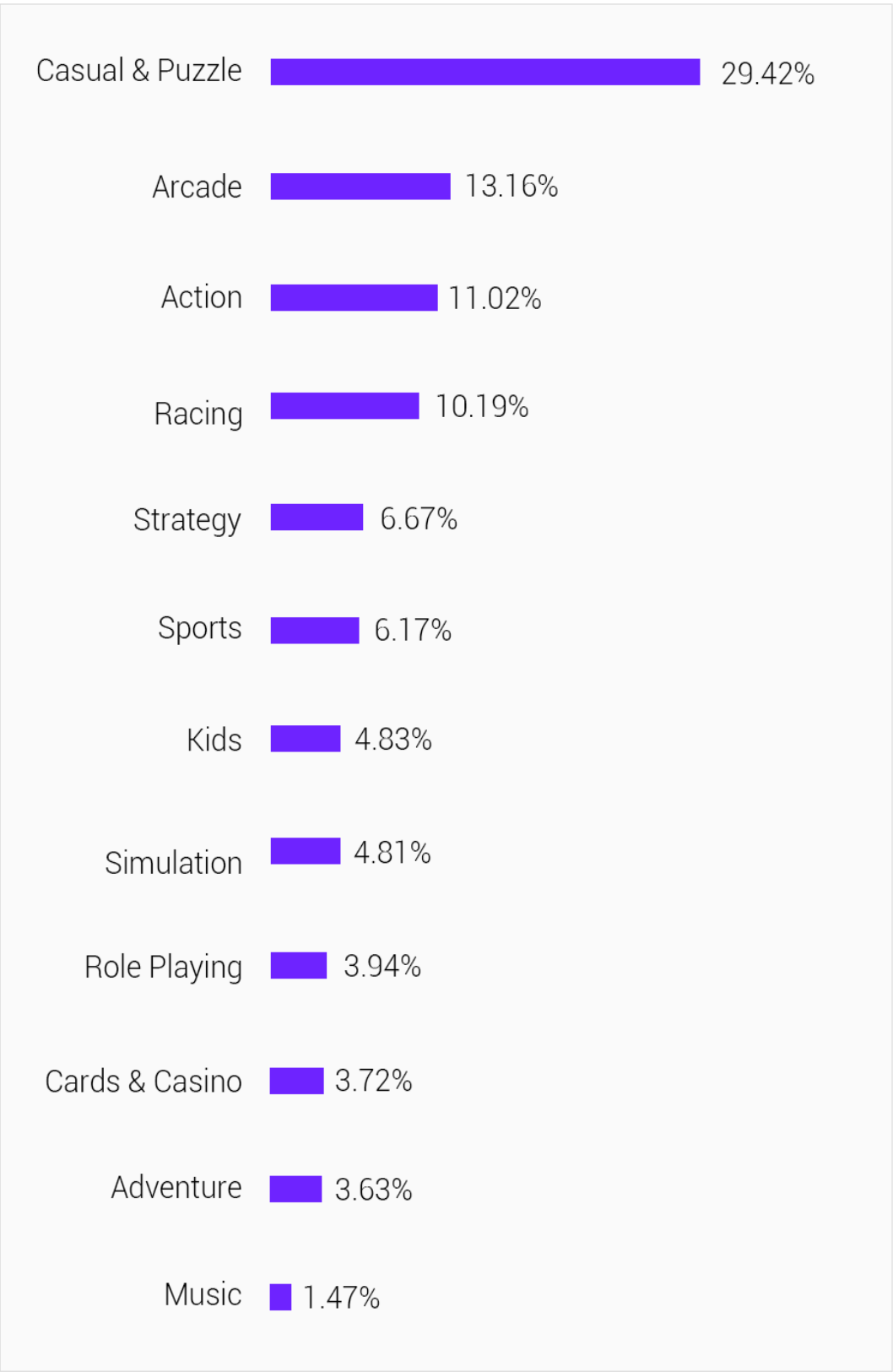
2014Q4



2015Q1



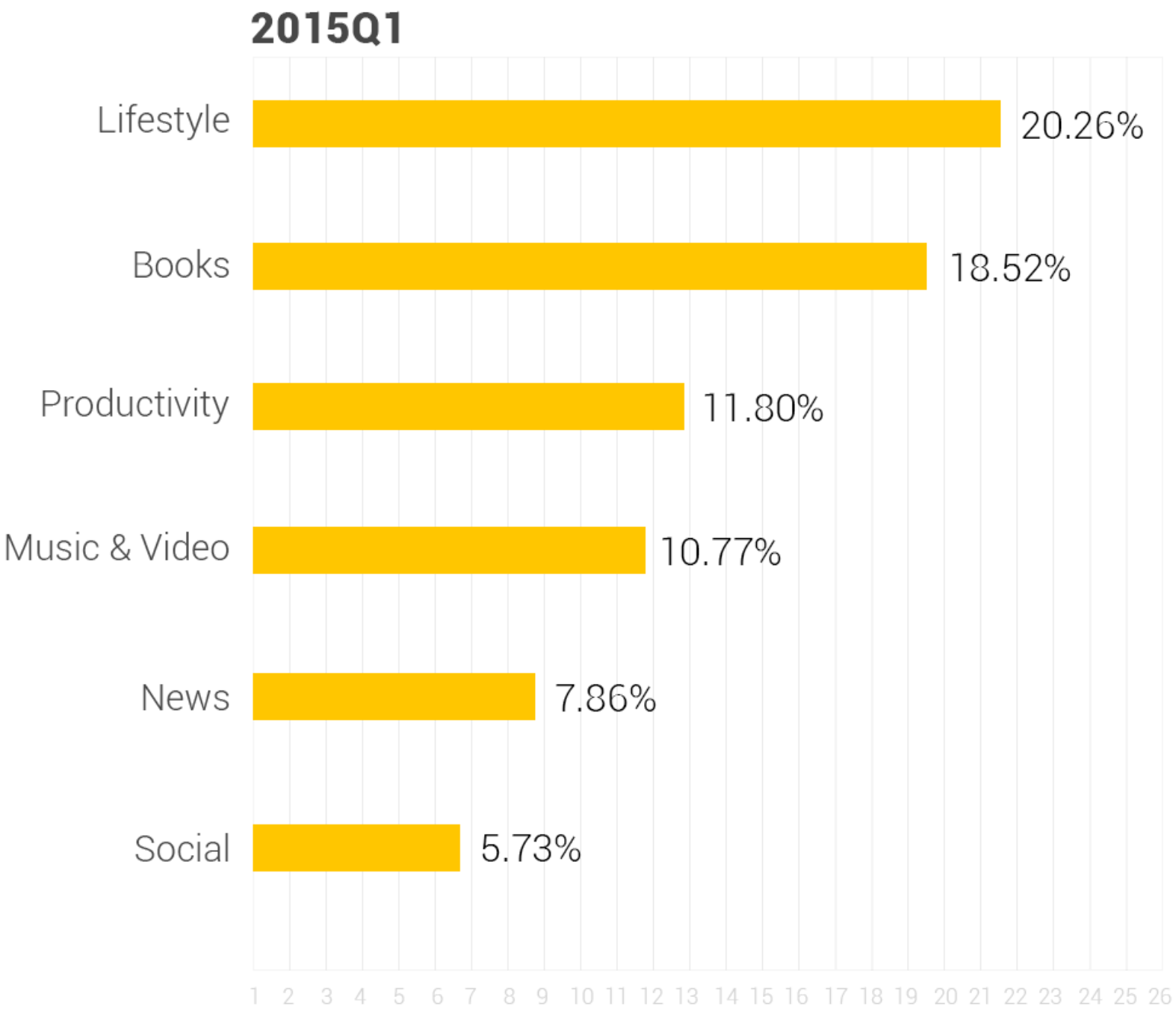
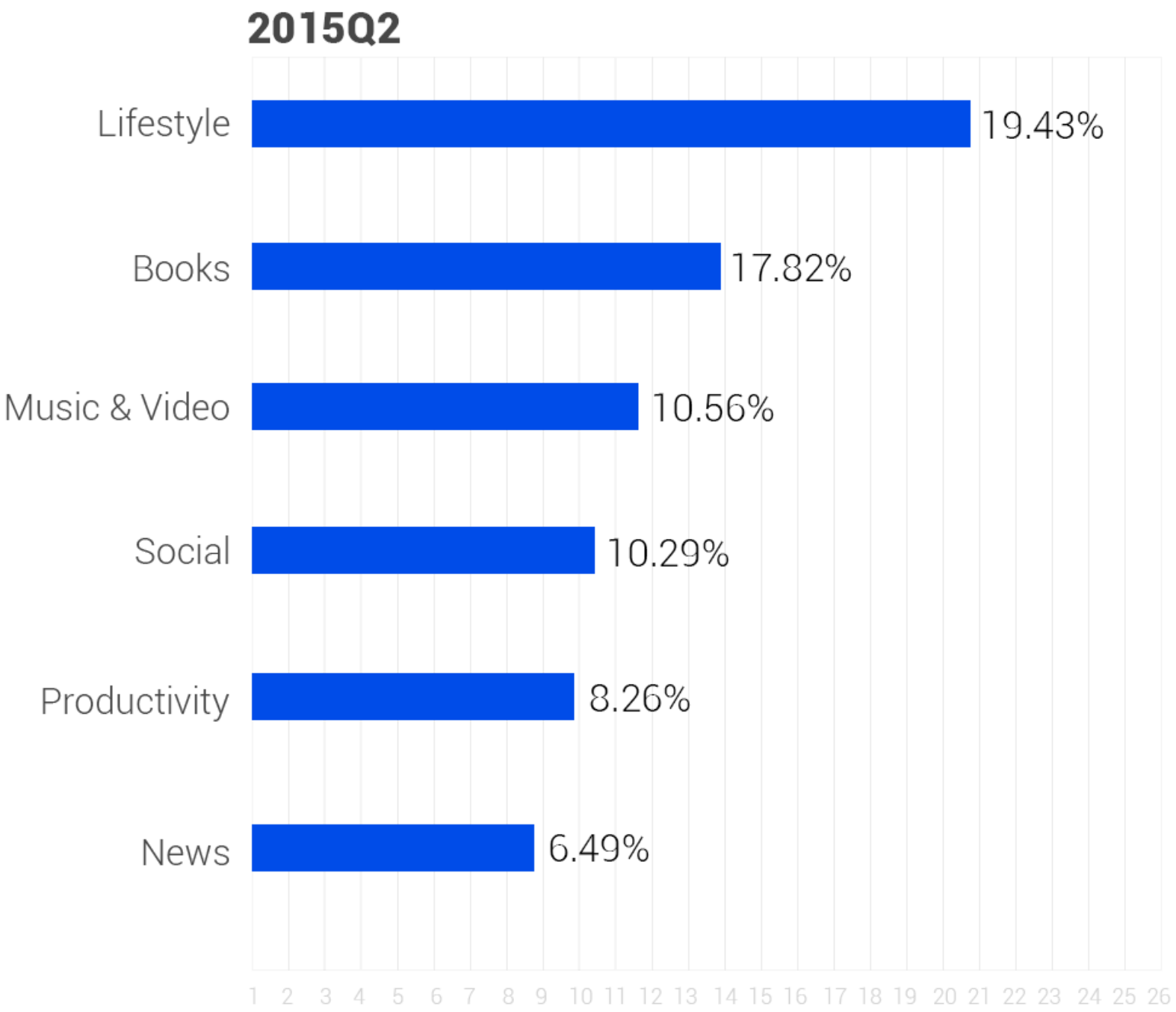
2015Q2





Top 200 most downloaded new apps

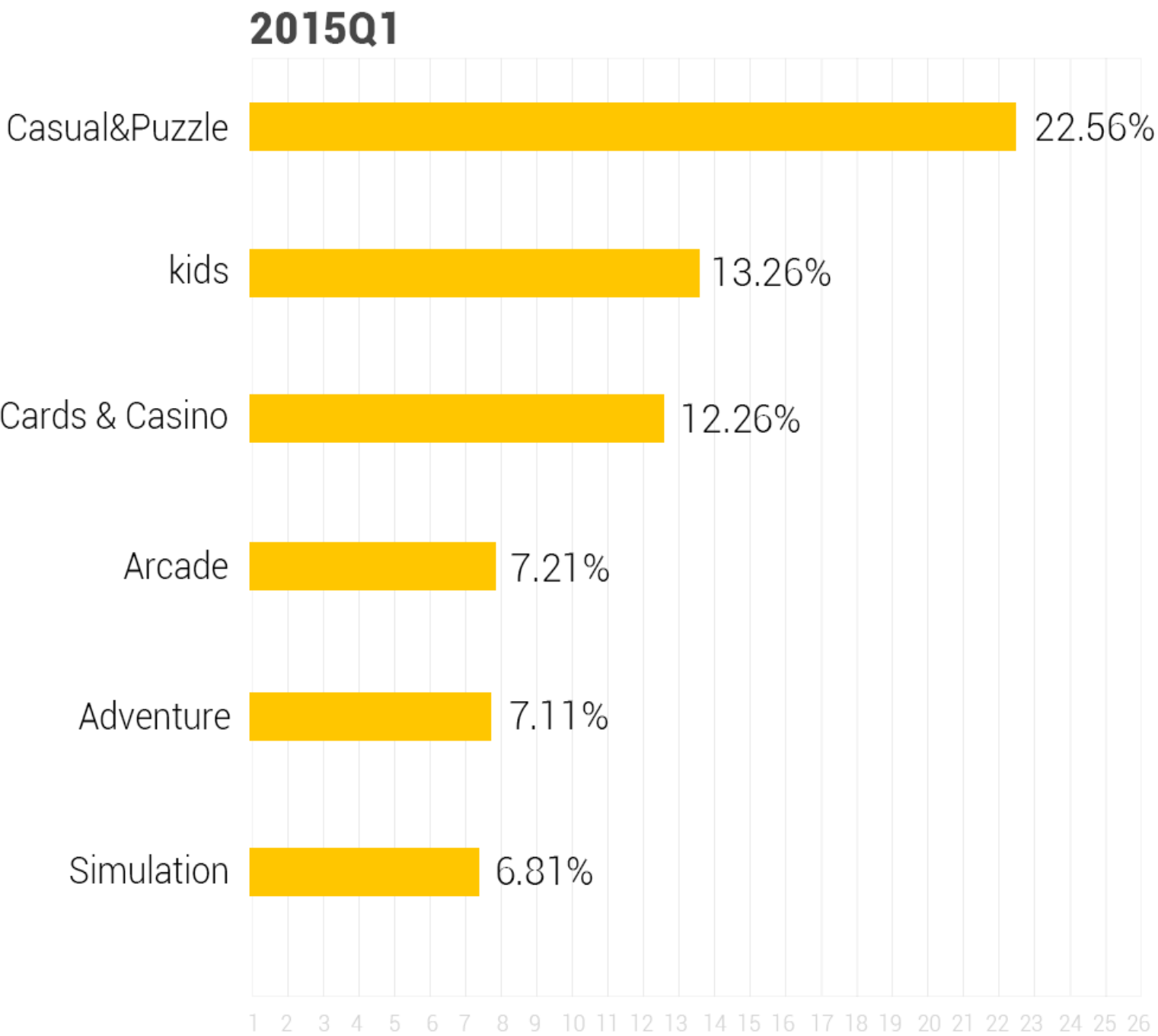
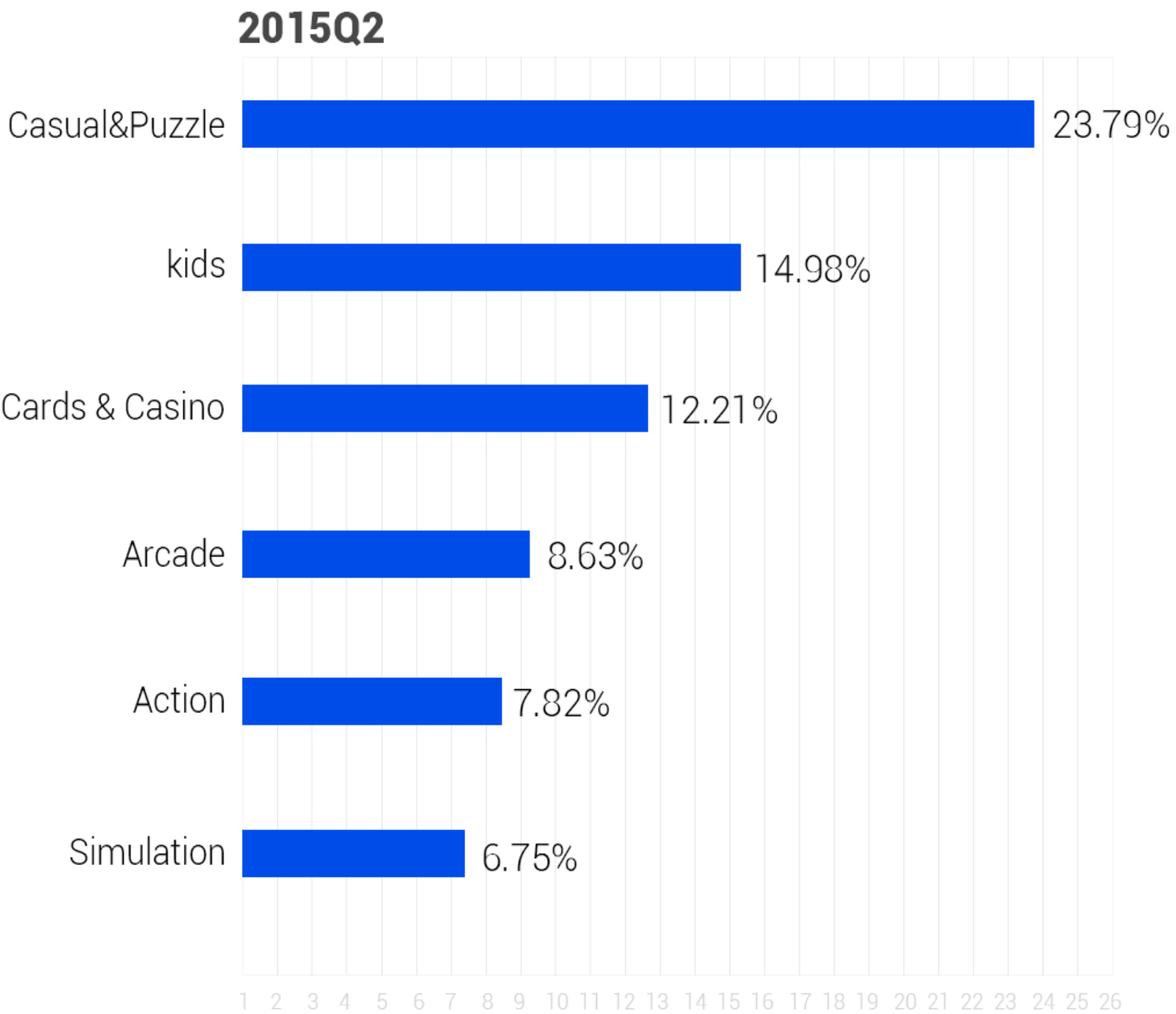
The most-downloaded new apps in 2015 Q2 were in the Lifestyle category. The second highest category was Books. Downloads of these two categories of apps decreased slightly from 2015 Q1 to 2015 Q2.





Top 200 most downloaded new games

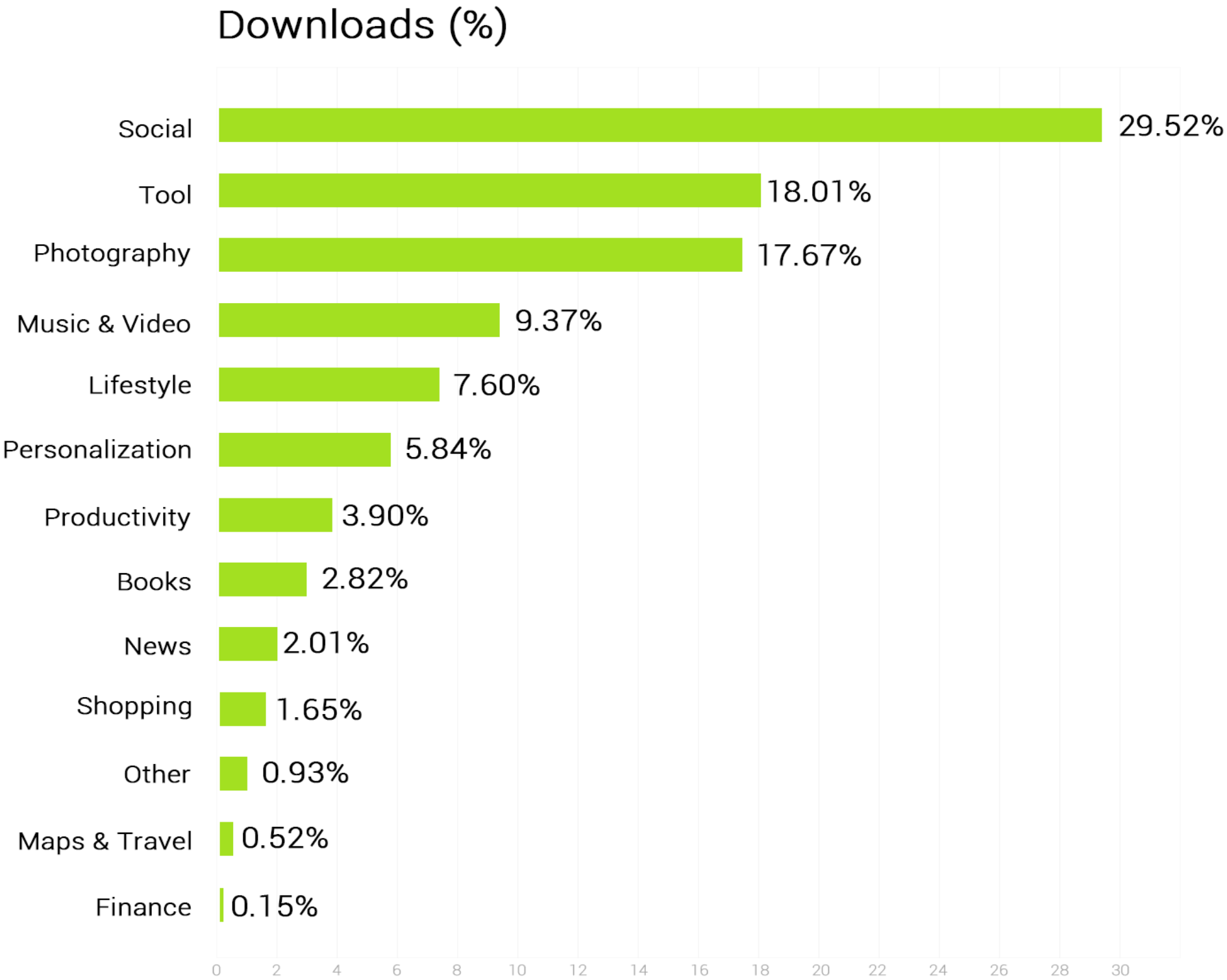
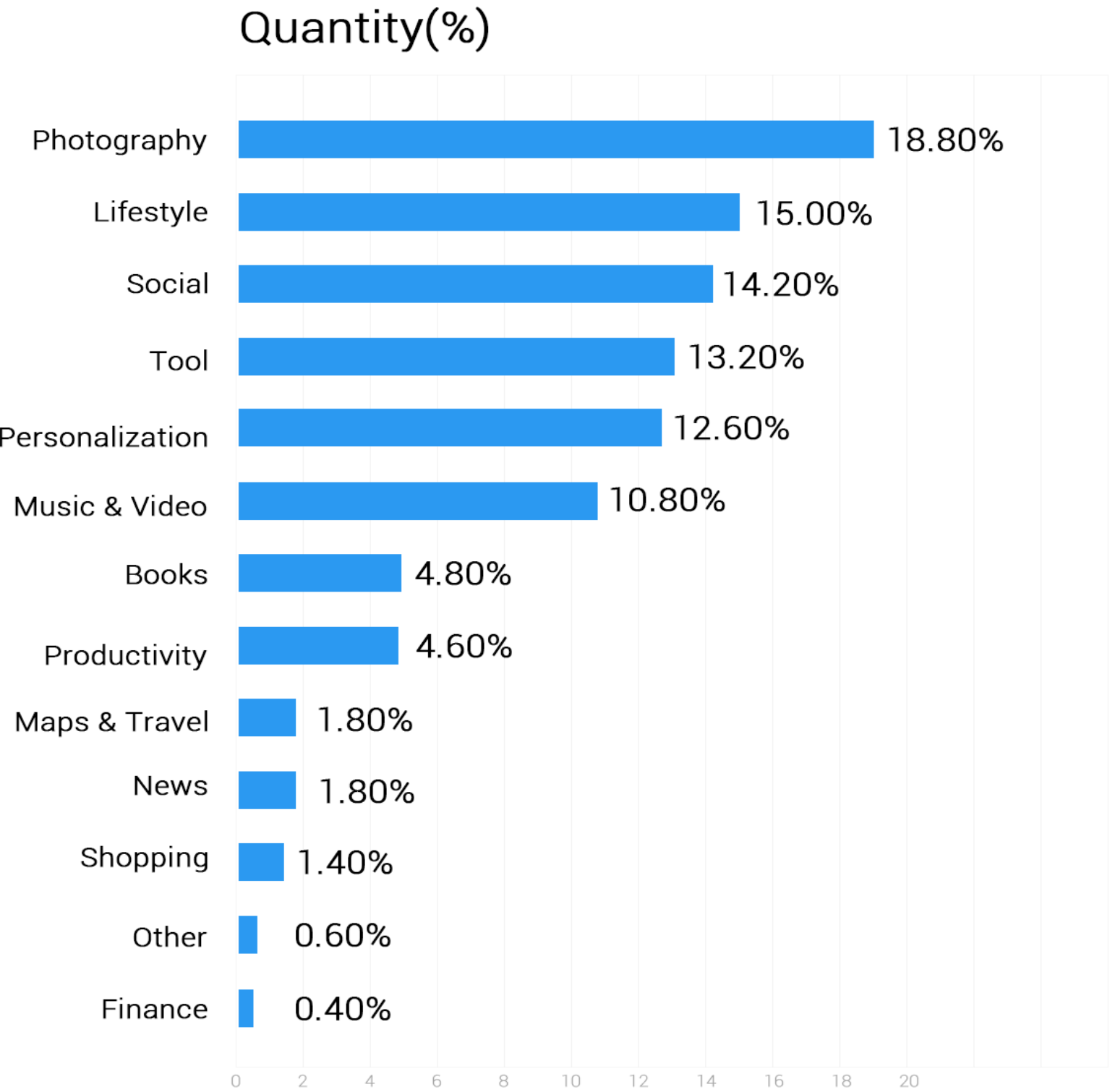
Games in the Casual & Puzzle category remained the most downloaded games, and the other top 5 categories remained largely the same from 2015 Q1 to 2015 Q2.





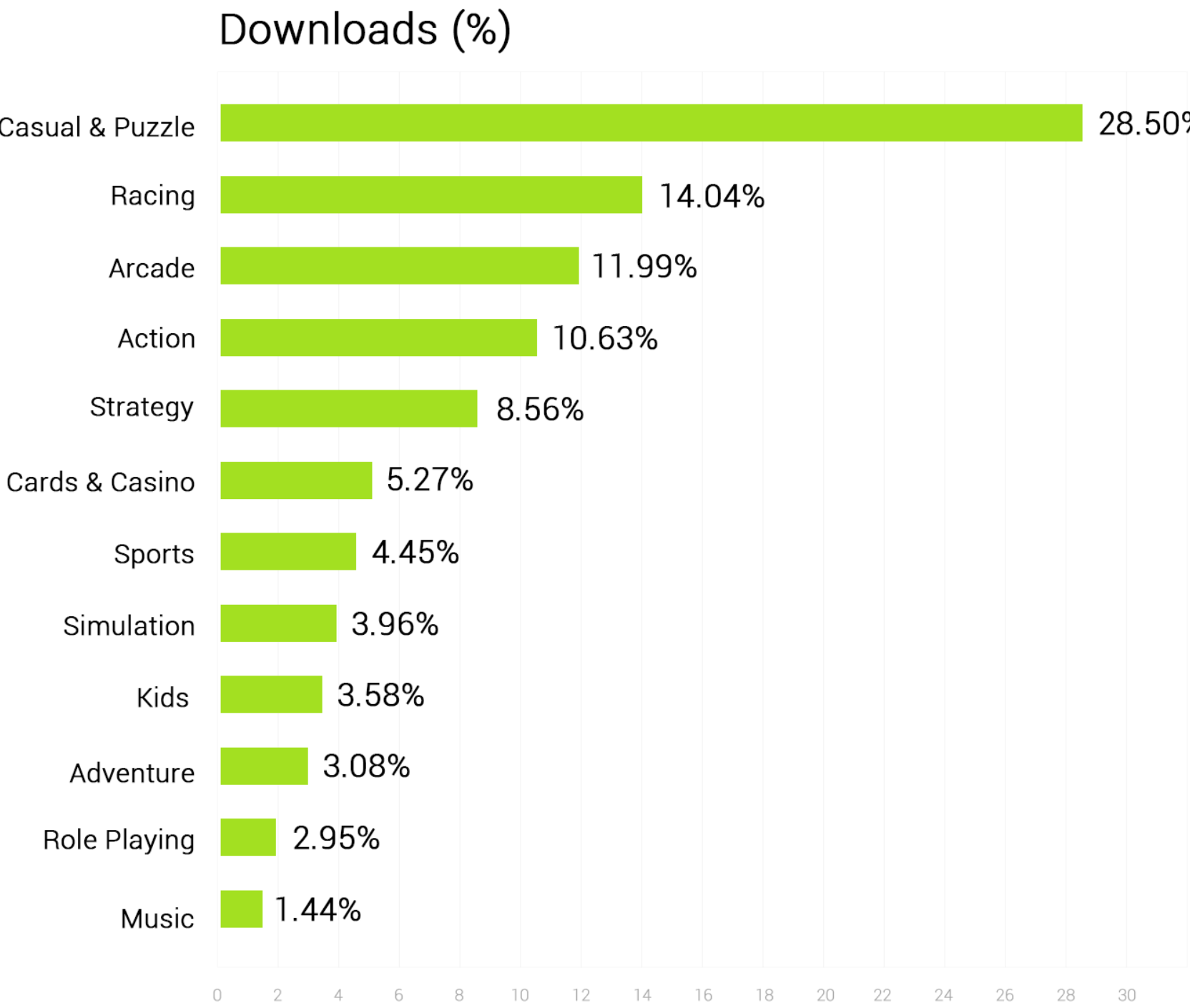
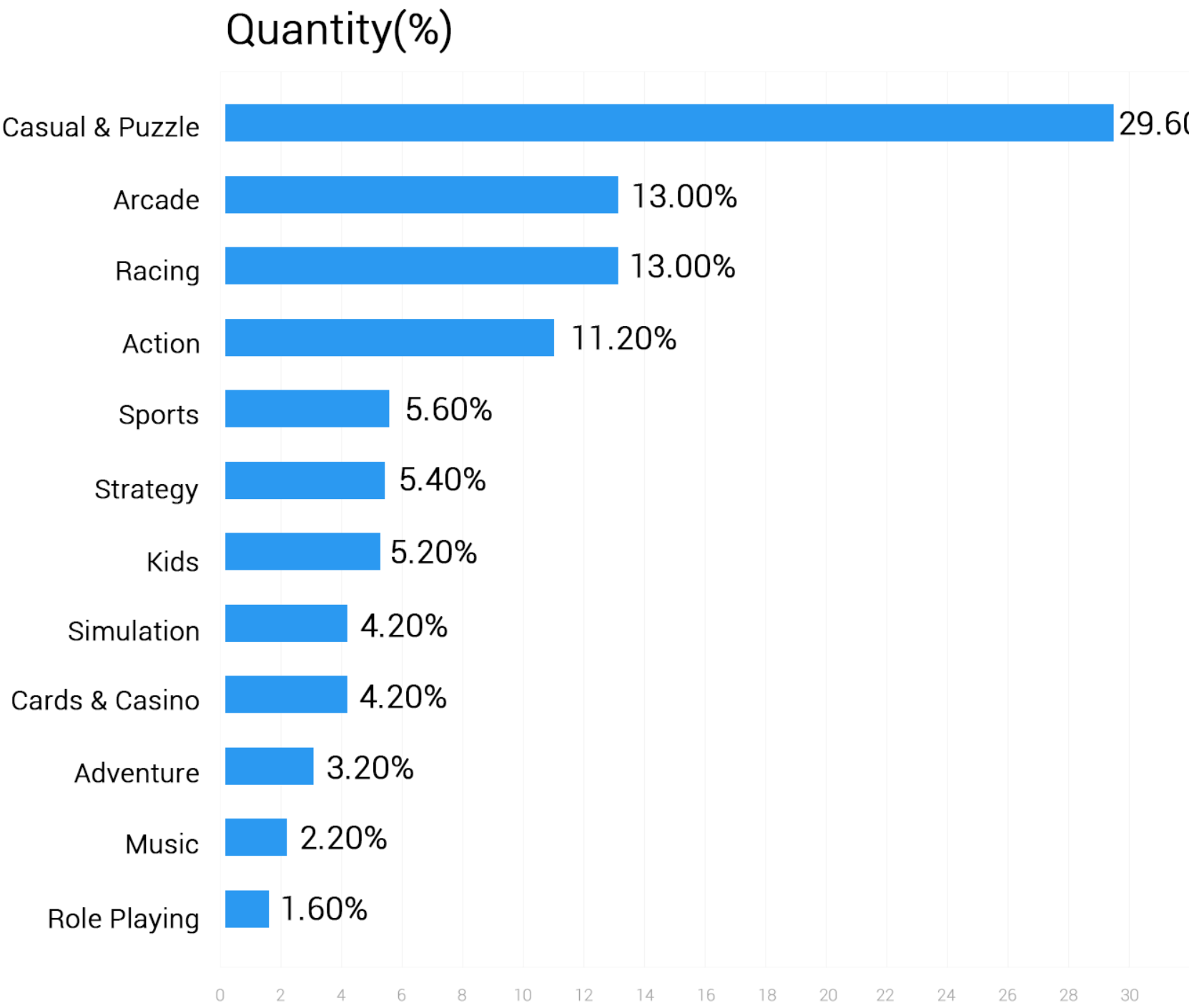
Top 500 app types distribution

Apps in the Social and Tools categories had a disproportionately higher percentage of downloads compared to their quantity (availability) on MoboMarket.



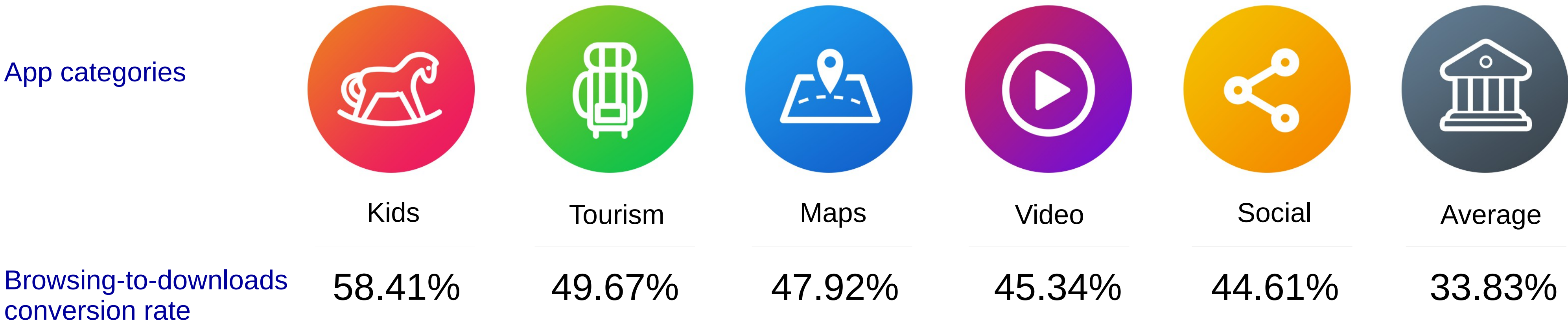


Top 500 game types distribution



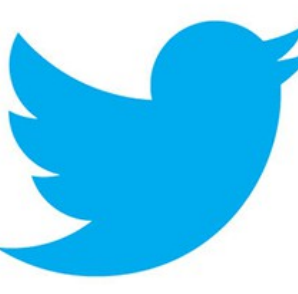
App browsing conversion charts

In examining the browsing-to-downloads conversion rate, we can see that users are eager to try all kinds of apps for children and tourism. We observed that users are apparently willing to try all available apps in these categories.



Top 10 installed social apps

Apps in the Social Media category remained relatively stable in terms of popularity, although there were some changes. Tema Transparan BBM is no longer in the list of top communication apps used by MoboMarket users. In addition, WeChat made an appearance for the first time in our user base.

1  BBM	2  Facebook	3  Instagram	4  LINE	5  WhatsApp
6  UC Browser	7  Messenger	8  Opera Mini	9  Twitter	10  WeChat

Top 10 installed photography apps

PicsArt, Camera 360, Behel Camera Cantik and Candy Camera for selfies all made the list of top 10 installed photography apps via MoboMarket for the first time in 2015 Q2.

1  B612 - Selfie from the heart	2  Camera360 Ultimate	3  Photo Grid - Collage Maker	4  Retrica	5  BeautyPlus - Magical Camera
6  PicsArt - Editor de imagem	7  Camera360 for Android 1.5	8  Camera 360 Editor	9  Behel Camera Cantik	10  Candy Camera for Selfie

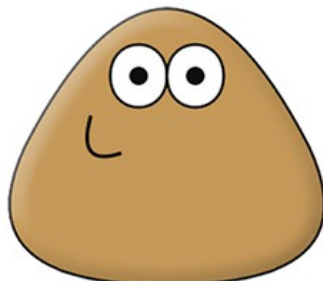
Top 10 installed tool apps

There is a very clear preference for browsers, accelerators, power-saving apps and security apps.

1  UC Browser Mini for Android	2  Clean Master (Speed Booster)	3  Baidu Browser Mini(Small&Fast)	4  Emoji Keyboard	5  DU Speed Booster Cache Cleaner
6  Baidu Browser (Fast & Secure)	7  LEO Privacy Guard	8  Omni Swipe (ex-Lazy Swipe)	9  Remote Control for TV	10  APUS Launcher -Small, Fast, Boost

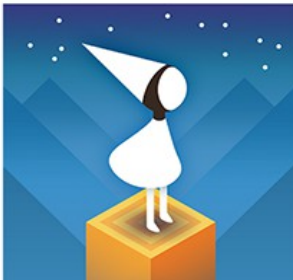
Top 10 installed games

A few things have changed in the Games category since the previous quarter. Minecraft - Pocket Edition, Dragon Rider, HeroCraft, Domino QiuQiu and Sopo tow Jarwo Balapan Motor grew very fast to enter the list of top 10 installed games.

1  Clash of Clans	2  Subway Surfers	3  LINE Let's Get Rich	4  Pou	5  Minecraft Pocket Edition
6  Dragon Rider	7  HeroCraft	8  Domino QiuQiu	9  Sopo tow Jarwo Balapan Motor	10  Plants vs. Zombies FREE

Top 10 installation package sizes

The largest package size on MoboMarket is around 1338 Mb, and the smallest is around 0.0068 Mb, 2,000 times smaller than the biggest. The download quantity of large packages was relatively small. To a certain extent, streamlining the installation package size is conducive to enhancing an app's market share.

1  FIFA 14 by EA SPORTS™	2  UAE Camel Racing	3  Plants vs. Zombies™ 2	4  The Room	5  Scribblenauts Remix
6  DuckTales: Scrooge's Loot	7  Monument Valley	8  Back to Bed	9  忍者Q傳 (岸本さん獨家授權)	10  Worms 2: Armageddon

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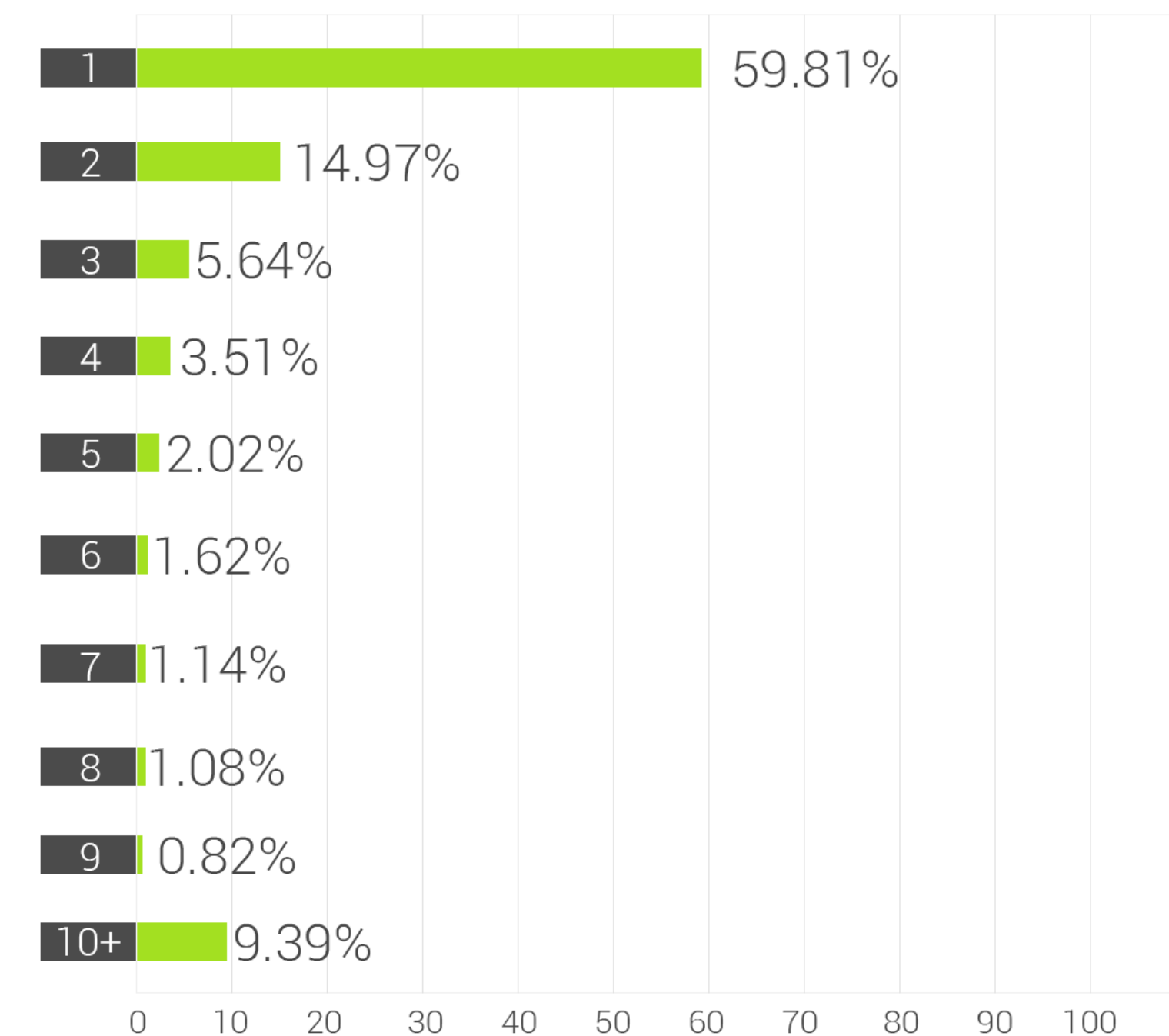
Update behavior analysis

- How many apps do users update?
- What type of apps do users update?

How many apps do users update?

- 4.97% of users update apps on a daily basis. On average, they update 0.17 apps per day, which shows that users are not particularly willing to update their apps.
- Among those users who update their apps at least once, 74.78% of them update 1 or 2 apps per day, and the share of those people who update 10 apps or more per day is 9.39%. This means a minority of users update their apps frequently.

app daily update number

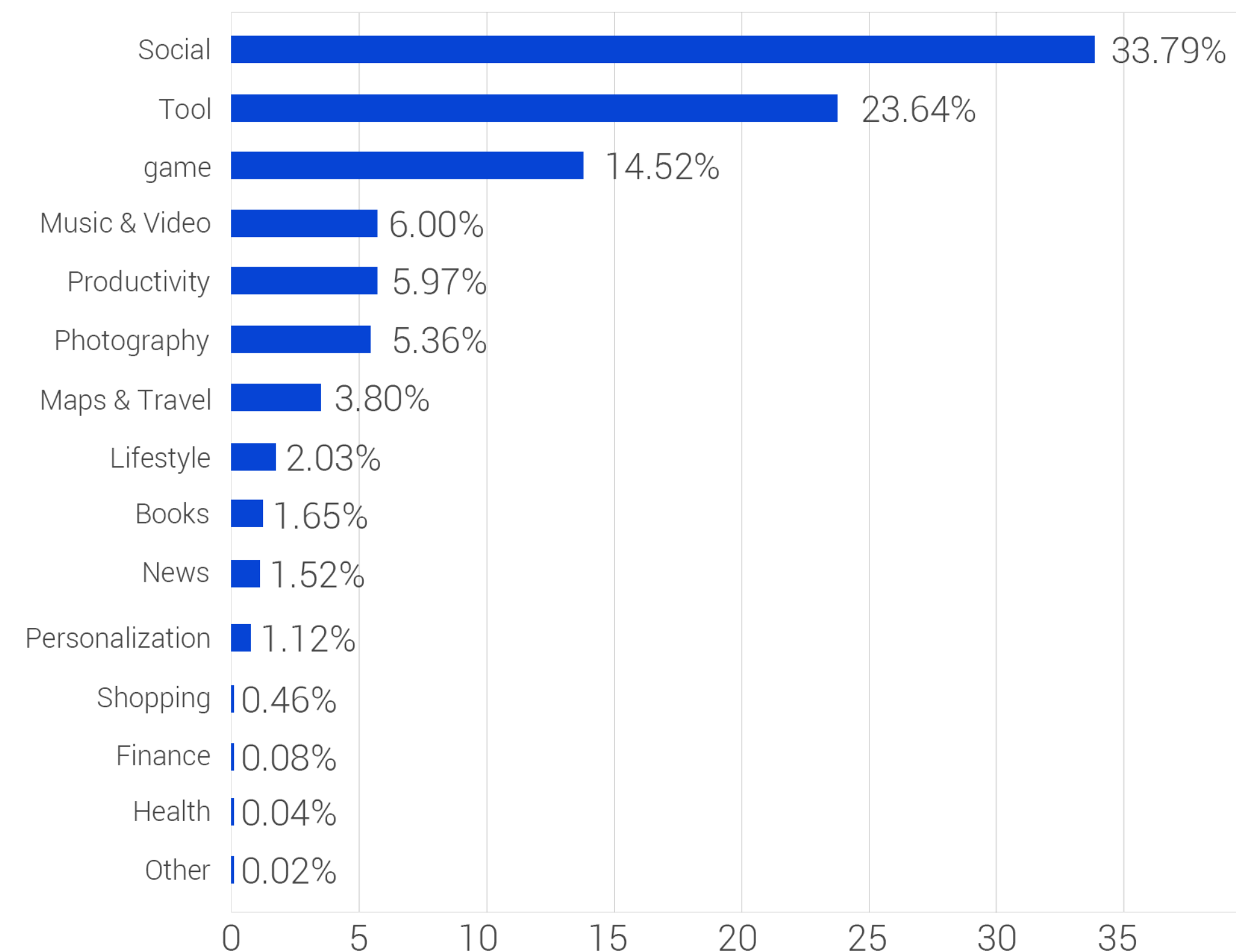


What type of apps do users update?

- Social apps are updated most frequently at 33.79%, followed by Tools at 23.64%.
- Although apps in the Game category had the most downloads, updates for games accounted for only 14.52%. This is mainly because social apps like BBM and Facebook have a huge number of users and are used by people over a long period of time. Games have a shorter life-cycle and can't maintain a steady public demand like social apps or tools.
- On average, users install 3 to 4 social apps on their phone.

*1. Social apps: examples are Facebook, Twitter, etc.

*2. Tool apps: examples are Baidu Browser, DU Speed Booster, etc.





For further information, please visit:

Our official website for app downloads: <http://m.mobomarket.co.id/>
Our developers platform to promote your app: <http://dev.mobomarket.co.id/>

Our news platform for further information:

Facebook: [MoboMarket Indonesia](#)

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