

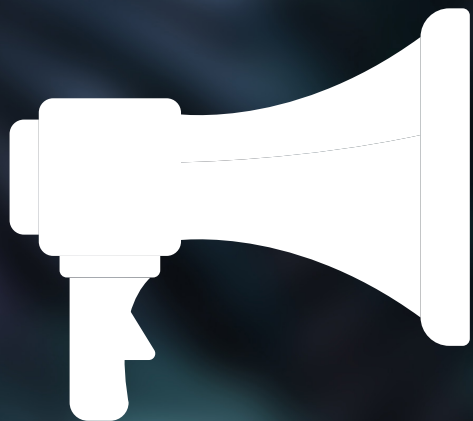
**Apps
vs
Mobile
Websites:
Understanding
Their Users**

INMOBI
2020 Report

Table of Contents:

- **Introduction**
- **Overview of User Gender**
- **Overview of User Ages, Incomes and Locations**
- **Overview of User Demographics and Interests**
- **Predicting the Future of Apps and Mobile Websites**
- **About InMobi and About Our Data**

Introduction



INMOBI
2020 Report

In 2020, consumers in the U.S. are expected to spend close to four hours a day with their favorite mobile devices (3:49 to be exact, [according to eMarketer](#)). Across all mobile devices, around 87% of all time spent is devoted to apps - and it jumps to 90% when looking just at time spent using smartphones.

90% of all time spent on smartphones are devoted to apps

But this doesn't mean the demise of mobile web browsers. While apps make sense for some use cases, they're not ideal for certain transactions. Just looking up a quick fact or making a one-time purchase? Mobile web is probably your best bet. Logging into your favorite social network or playing your favorite game? Apps are more ideal here.

So who specifically downloads apps, and who tends to visit mobile websites? To find out, we turned to [InMobi Pulse](#). InMobi Pulse builds a holistic understanding of the customers from across data sources ranging from [InMobi Exchange](#), which reaches 1.6 billion users globally, to permissively-sourced deterministic first-party telco data to stated feedback directly from the customers.

We aimed to better understand how these audiences compare by looking at mobile web visitors and app owners (i.e. people who have the app downloaded on their mobile device) in the following categories: streaming video, e-commerce and retail, auto, health and fitness, pharmacy/convenience store, home and garden, and quick-service restaurants (including food delivery apps and coffee and pizza chains, among other major brands).

Here's what the data reveals.

Overview of User Gender

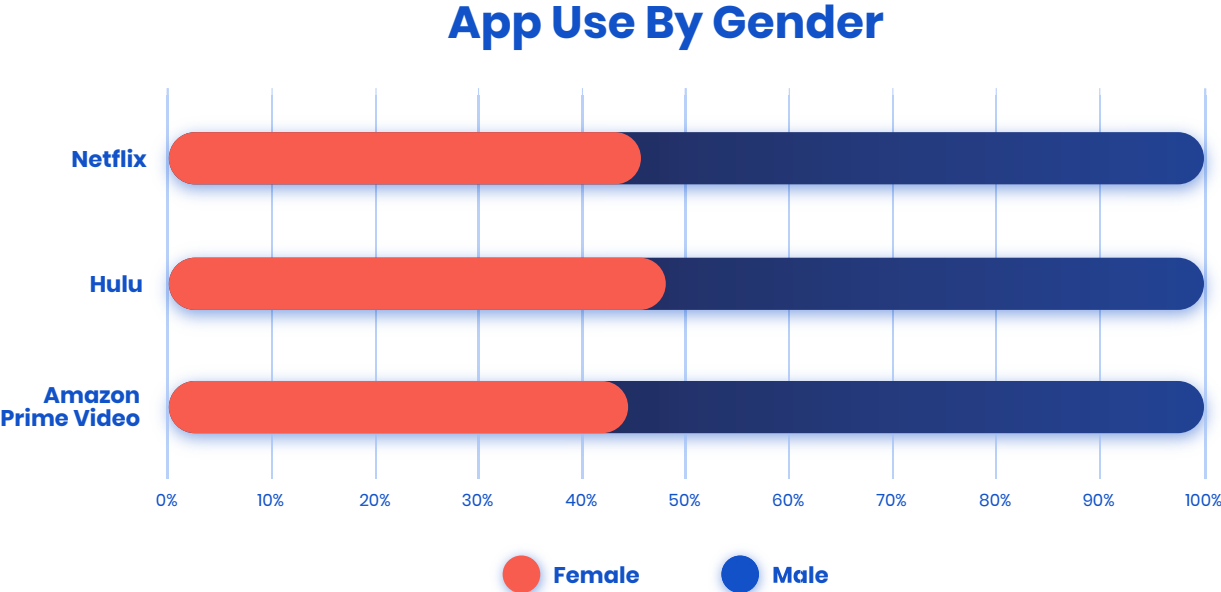


INMOBI
2020 Report

The vast majority of the time, app owners are more likely to be male than female. This is especially the case [in the QSR category](#). For example, for both Wendy's and Domino's, over 61% of all app owners are male. The app owner audiences for Chick-Fil-A and Chipotle are more evenly split than that, but even their app owners are over 52% male.

QSR is not alone in this breakdown. [Auto](#) is another male-dominated category, with Kia and Hyundai having the most evenly split mobile app audience among the top 10 auto brands in the U.S. And, to be expected, most of those with sports apps or [men's shaving apps](#) are - you guessed it - male.

Somewhat surprising though is the gender split on [streaming video apps](#). The majority of those with the Netflix, Hulu and/or Amazon Prime Video apps on their mobile devices are male.



This doesn't indicate a male-only audience for mobile, however. For Chick-Fil-A and McDonald's, for example, more of their mobile website visitors are female than male. Over 58% of Chick-Fil-A mobile website visitors and more than 50% of McDonald's mobile web visitors are female.

More women than men visit the mobile website of auto research and buying website CarMax as well. And, over half of those watching Netflix and Hulu on mobile web are female.

Back on the app side though, there are some notable exceptions to this breakdown. Not only are Sweetgreen app owners more likely to be female than male, but the same is true in the coffee category; Dunkin' and Starbucks, the two biggest coffee brands in the U.S., have more female app owners than male ones.

The pharmacy space is similar to the coffee space in this regard as well. The app audience for Walgreens, CVS and Rite Aid all skews female.

Health and fitness apps are another exception. In fact, for some of the top health and fitness apps in the U.S., as many as 85% of all app owners are female.

65%

of people with the CVS, Rite Aid and/or Walgreens apps on their mobile devices are female

52%

of CarMax's mobile website visitors are female

Overview of User Ages, Incomes and Locations



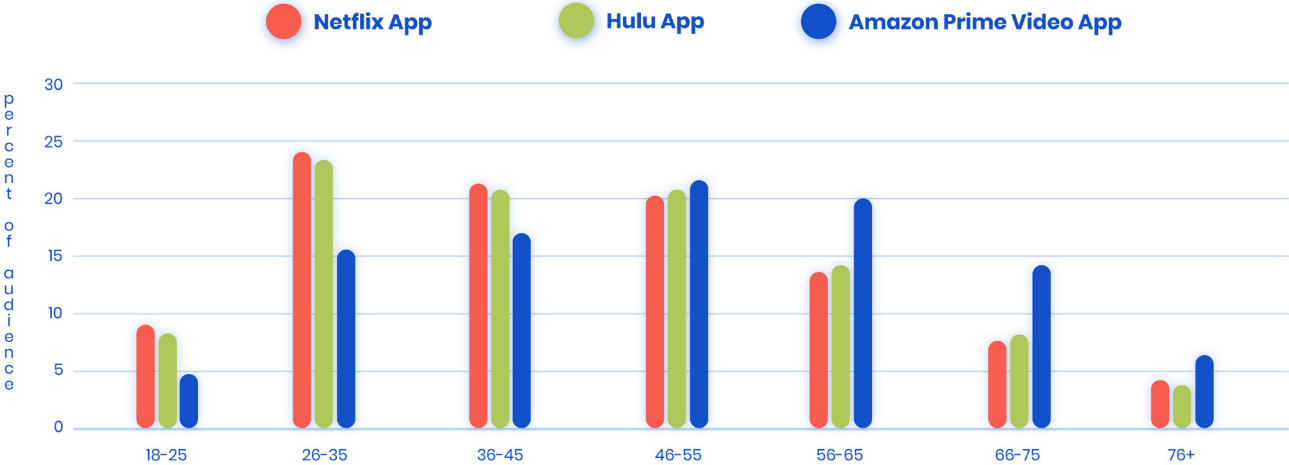
Inmobi
2020 Report

Unlike with gender, there's no clean split between app owners and mobile website visitors when it comes to age. It depends more on the space versus the medium. But, more often than not, mobile web visitors tend to skew slightly younger.

In the QSR space, often around a quarter of both mobile website visitors and app owners are between 25 and 34, another quarter are between 35 and 44, and another quarter are between 45 and 54. This is true for coffee brands too, and this ratio more or less exists for the major pharmacy brands as well.

Auto tends to skew older, as does Amazon Prime Video's audience and those visiting the mobile websites of major shaving brands like Schick. Health and fitness is usually on the younger side, as are Netflix's and Hulu's audiences. Android Auto also gets a lot of usage from the 24-35 crowd.

App Use By Age Group



More often than not, app owners tend to make more money per year than do mobile website visitors. This is true in video streaming, DTC men's shaving, auto and with major QSR brands like McDonald's, Burger King and Domino's.

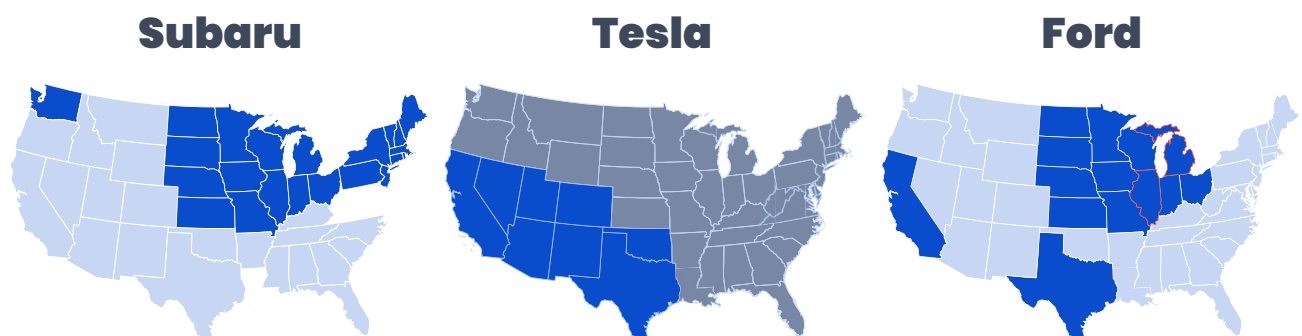
There are apps that have more broad appeal, and thus do well with both more and less affluent audiences. This includes free apps like many health and fitness properties and sports-centric apps.

Are app owners located in different parts of the country than mobile website visitors are? It depends.

Take the video streaming world. Among mobile website visitors, California is the top state. But, among app owners, Texas is the top state.

For other sectors, the difference is far less clear cut. For some brands, more app owners might be in major cities, but the opposite could be true for others.

More often than not, regional preferences and brand loyalties trump mobile web versus app. Auto is a good example of this, with newer brands like Tesla doing well in California and the Southwest, more established ones like Ford having a strong following in the upper Midwest, and outdoors-oriented Subaru having a larger than average presence in Washington state.



Overview of User Demographics and Interests



INMOBI
2020 Report

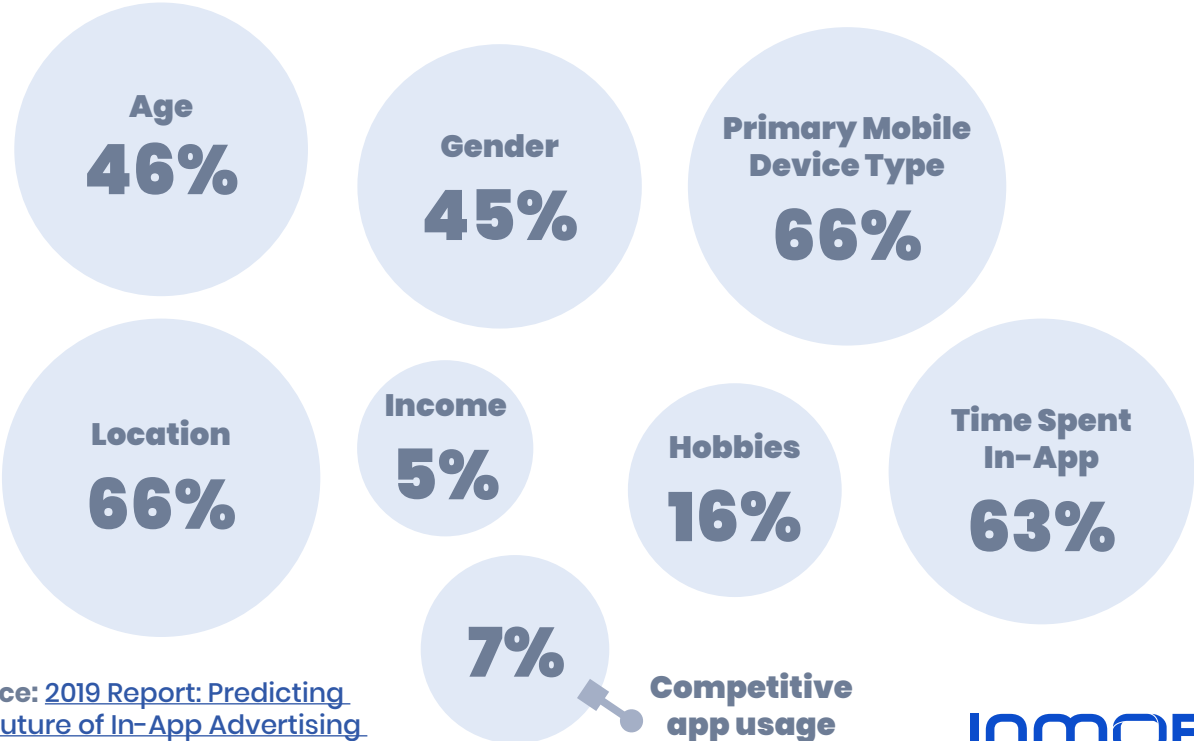
Across the board, app owners are more likely to be White than Non-White. Mobile website visitors are often majority White as well, but the difference isn't as stark as it is on the app side.

In coffee, QSR, pharmacy, auto and shaving, app owners and mobile website visitors are either majority White or mostly White. Take Nextdoor for example; over 66% of app owners are White, while around 64% of mobile web visitors are White. The ratios are different, but the same trend is there.

There are a few exceptions here though. Many **soccer-focused apps** have a majority Hispanic audience, as do some consumer-to-consumer brands like OfferUp. Some top fitness apps also have a majority non-White audience.

Among the **top three pizza brands in the U.S.**, most app users are White or Hispanic, while most website visitors are Hispanic or Black/African-American.

Which of the following attributes do you know about your app users?



Source: [2019 Report: Predicting the Future of In-App Advertising and Monetization](#)

More often than not, what a mobile website visitor is interested in aligns with what app owners are interested in. This makes sense, as there's still likely a shared motivation whether or not a dedicated app was involved.

Take streaming video. There, both mobile web visitors and app owners like to be entertained and show a strong preference for other entertainment apps and sites. In the consumer-to-consumer space, the shared interest is in scoring deals and saving money. In QSR, it's all about ordering food and drinks.

You get the idea. How someone is accomplishing their task may be different, but why (i.e. their motivation), remains the same.

- **C2C app owners often spend around 100 minutes per session using apps like letgo, OfferApp and VarageSale.**
- **Soccer fans are also big shoppers, frequently using e-commerce apps and mobile shopping websites.**
- **Some health and fitness app owners will often spend one to two hours a day on average using these workout and healthy lifestyle apps.**

Predicting the Future of Apps and Mobile Websites

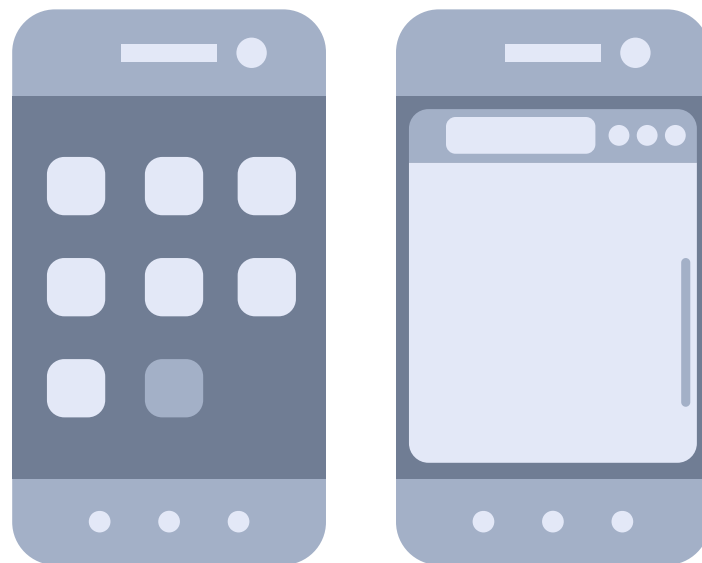


INMOBI
2020 Report

So is there a unifying theory of app versus mobile web audience? Not quite. As the data shows, it really depends. App owners and mobile website visitors are found at all age ranges, states and income levels, and among all ethnicities and genders. App owners tend to be wealthier White men, but that's hardly a universal distinction. Mobile is really the one thing that serves to unite all of us.

What does the future hold for mobile audiences? Likely, apps will continue to capture a greater share of the audience. Wealthier White men may be first adopters, but everyone else is not far behind them. As mobile devices become even more ubiquitous, as mobile cloud storage takes off and as more brands begin to wake up to the power and potential of apps, expect to see more universal app adoption across all consumer categories.

Mobile web browsers are unlikely to go away. Not only are web apps getting better, but the transactional use cases are sticking around. Still, as apps continue to assert their primacy, expect to see a greater array of app users among all Americans throughout 2020 and beyond.



About InMobi



inMOBI
2020 Report

About InMobi

InMobi is the world's leading Marketing Cloud, driving real connections between brands and consumers. We create new paths for brands to understand, identify, engage and acquire consumers by leveraging our exclusive access to mobile intelligence and technology platforms.

As a leading technology company founded in 2007, InMobi has been recognized as a 2019 CNBC Disruptor 50 company and as Fast Company's 2018 Most Innovative Companies. For more information, head to inmobi.com.

Our Commitment to Data Privacy: What You Need to Know About This Data

InMobi takes user privacy extremely seriously. We meet the most rigorous governance, compliance, and security standards. We have collaborated with consumer advocacy groups and incorporate guidelines from multiple federal government agencies to define industry-leading practices for data governance in the U.S.

Users retain complete control over the data they provide, have a choice in whether they participate and have transparency as to how their data is utilized. Subscribers have constant access to their privacy elections through multiple telco touchpoints. The patented anonymization platform ensures data sets are 100% secure, and are refreshed to ensure all data are anonymized.