

**PRIORI DATA**  
Quantify the app economy.

# **CLASSIFIEDS AS MOBILE APPS**

## **ICMA Amsterdam**

**May, 2016**

Patrick Kane  
Founder & CEO  
@pdkane

**[www.prioridata.com](http://www.prioridata.com)**  
**@prioridata**



## **Agenda**

1. Priori Data Background
2. The Mobile Economy
3. Today's landscape for classifieds apps
4. Q&A



**PRIORI DATA**  
Quantify the app economy.

**1.**

# **PRIORI DATA BACKGROUND**





**WE ANALYZE  
APP STORES**

**WIR SIND  
EIN BERLINER**

**Founded June 2013  
International team of 22**

PRIORI DATA BACKGROUND

## Me: A Reformed Banker Building A Data Business



Patrick Kane  
Founder / CEO

**Nationality:** US, now camped in an Eastern American outpost (Berlin)

**Before going “Start-up”:** I analyzed and invested in information companies, mostly in the healthcare space

**Talked to:** hundreds of publishers over the past 2 years, plus, yes, just about as many VCs

**Excited about:** mobile as the first truly global, truly universal technology product to deliver the internet (and information) to every person on the planet

Ex.

Morgan Stanley



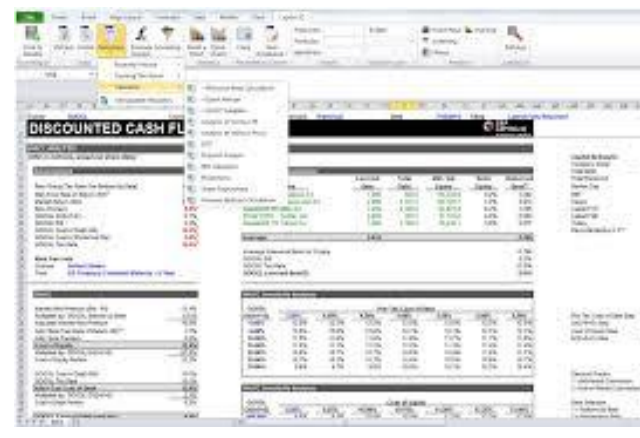


## PRIORI DATA BACKGROUND

## What I was Used To....Comprehensive Information Platforms



Asia Pacific						Europe					
Index Name	T	Last	Chg	%Chg	High	Low	Index Name	T	Last	Chg	%Chg
<b>ASX 200</b>	11/04/2011	5,148.50	-19.40	-0.38%	5,165.50	5,129.20	<b>FTSE 100</b>	11/04/2011	6,357.80	-1.80	-0.03%
NASDAQ Composite	11/04/2011	2,854.25	-1.75	-0.06%	2,859.00	2,849.00	<b>DAX</b>	11/04/2011	7,014.50	-1.50	-0.02%
CSI Industrial Index	11/04/2011	3,240.40	-8.00	-0.25%	3,250.40	3,231.40	<b>IBEX 35</b>	11/04/2011	9,124.00	-1.00	-0.01%
Dow Jones Industrial Average	11/04/2011	12,335.00	-5.00	-0.04%	12,341.00	12,327.00	<b>Stoxx 50</b>	11/04/2011	3,454.00	-0.50	-0.01%
Nikkei 225	11/04/2011	9,122.00	-10.00	-0.11%	9,132.00	9,112.00	<b>EURO STOXX 50</b>	11/04/2011	3,454.00	-0.50	-0.01%
S&P 500	11/04/2011	1,212.25	-0.25	-0.02%	1,213.00	1,211.50	<b>Hang Seng</b>	11/04/2011	23,000.00	-100.00	-0.43%
S&P 500 VIX	11/04/2011	25.75	0.25	0.97%	26.00	25.50	<b>Hong Kong</b>	11/04/2011	23,000.00	-100.00	-0.43%
Alibaba Group	11/04/2011	110.00	-1.00	-0.91%	111.00	109.00	<b>Shanghai</b>	11/04/2011	4,800.00	-20.00	-0.42%
Amazon.com	11/04/2011	340.00	-2.00	-0.59%	342.00	338.00	<b>Shanghai CSI 300</b>	11/04/2011	4,800.00	-20.00	-0.42%
Oracle Corp	11/04/2011	38.00	-0.20	-0.53%	38.20	37.80	<b>Shanghai CSI 300 VIX</b>	11/04/2011	18.00	0.50	2.78%
Qualcomm	11/04/2011	110.00	-1.00	-0.91%	111.00	109.00	<b>Shanghai CSI 300 VIX</b>	11/04/2011	18.00	0.50	2.78%
Twitter	11/04/2011	13.00	-0.10	-0.77%	13.10	12.90	<b>Shanghai CSI 300 VIX</b>	11/04/2011	18.00	0.50	2.78%
Facebook	11/04/2011	85.00	-1.00	-1.18%	86.00	84.00	<b>Shanghai CSI 300 VIX</b>	11/04/2011	18.00	0.50	2.78%
Google	11/04/2011	280.00	-2.00	-0.71%	282.00	278.00	<b>Shanghai CSI 300 VIX</b>	11/04/2011	18.00	0.50	2.78%
Microsoft	11/04/2011	31.00	-0.10	-0.32%	31.10	30.90	<b>Shanghai CSI 300 VIX</b>	11/04/2011	18.00	0.50	2.78%
Apple	11/04/2011	150.00	-1.00	-0.67%	151.00	149.00	<b>Shanghai CSI 300 VIX</b>	11/04/2011	18.00	0.50	2.78%
IBM	11/04/2011	170.00	-1.00	-0.59%	171.00	169.00	<b>Shanghai CSI 300 VIX</b>	11/04/2011	18.00	0.50	2.78%
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PRIORI DATA BACKGROUND

# What Existed in Mobile....An Annual Press Release

Apple Press Info [Press Releases](#)

## iPhone App Store Downloads Top 10 Million in First Weekend

More than 800 native applications are now available on the App Store

touch users have already downloaded more than 10 million applications from its groundbreaking new App Store since its launch late last week. Developers have created a wide array of innovative mobile applications ranging from games to location-based social networking to medical applications to enterprise productivity tools. Users can wirelessly download applications directly onto their iPhone or iPod touch\* and start using them immediately. More than 800 native applications are now available on the App Store, with more than 200 offered for free and more than 90 percent priced at less than \$10.

"The App Store is a testament to the power of the iPhone. In just three days," said [redacted], "we've seen over 10 million applications downloaded."

Many of these amazing new applications take advantage of iPhone's large display, Multi-Touch™ user interface, fast hardware-accelerated 3D graphics, built-in accelerometer and location-based technology to bring far more powerful applications to the mobile arena than ever before.

Apple Press Info [Press Releases](#)

## App Store Rings in 2015 with New Records

CUPERTINO, California—January 8, 2015—Apple® today announced that the first week of January saw the developer community has now earned over \$25 billion."

Store developers have earned a cumulative \$25 billion from the sale of apps and games. The introduction of the significant iOS update ever, gave developers the ability to create amazing new apps and offers innovations that proved wildly popular with App Store customers around the world.

"This is a testament to the power of the App Store," said Eddy Cue, Apple's senior vice president of Internet Software and Services. "We're so proud of the developers that bring to the apps they create for iOS users and that the developer community has now reached over 1.4 million apps."

During the holiday season App Store customers helped make history with their support of Apps for the Global Fund to fight AIDS. Apple donated \$20 million this quarter, and since partnering with (RED) has donated over \$100 million.

the iOS ecosystem has helped create 627,000 jobs in the US alone.

segment is the newest generation of independent game creators, including the UK's ustwo, maker of Monument Valley; Australia's Hipster Whale, creator of the clever and intuitive game Crossy Road;

## PRIORI DATA BACKGROUND

# What Existed in Mobile...An Ordinal Rank List

The screenshot displays the Apple App Store interface for the 'Top Free iPhone Apps' section. The header shows navigation options like 'My Apps', 'My iPhone Apps', 'My iPad Apps', 'Updates', and 'App Store'. Below the header, the 'Top Free iPhone Apps' title is followed by filters for 'Paid', 'Free', and 'Top Grossing'. The apps are listed in a grid, each with its icon, name, category, and a 'Get' button. The apps are ranked by their ordinal position in the list.

Rank	App Name	Category	Get Button
1.	Shpock boot sale & classifie...	Lifestyle	+ Get
2.	eBay Kleinanzeigen f...	Lifestyle	Get
3.	Amazon DE	Lifestyle	+ Get
4.	eBay	Lifestyle	Get
5.	PAYBACK - Coupons,...	Lifestyle	Get
6.	H&M	Lifestyle	Get
7.	Zalando Fashion &...	Lifestyle	+ Get
8.	Tinder	Lifestyle	Get
9.	Kleiderkreisel	Lifestyle	+ Get
10.	Wish - Shopping Mad...	Lifestyle	+ Get
11.	ALDI TALK	Lifestyle	Get
12.	Next Music Player and Mp...	Lifestyle	Get
13.	iMusic Stream for ...	Lifestyle	Get
14.	barcoo Barcode Scann...	Lifestyle	+ Get
15.	stylefruits - Fashion & Outfits	Lifestyle	+ Get
16.	Geek - Smarter...	Lifestyle	+ Get
17.	IKEA	Lifestyle	Get
18.	Ultra Music Player - Best...	Lifestyle	+ Get
19.	ASOS	Lifestyle	+ Get
20.	Lidl	Lifestyle	Get
21.	Groupon - Deals, Coupon...	Lifestyle	+ Get
22.	ZARA for iPhone	Lifestyle	Get



PRIORI DATA BACKGROUND

# What We Built...An Information Platform for the Mobile Era

**Public Data**  
crawled from  
the app stores



**Proprietary Data**  
shared by our  
partners



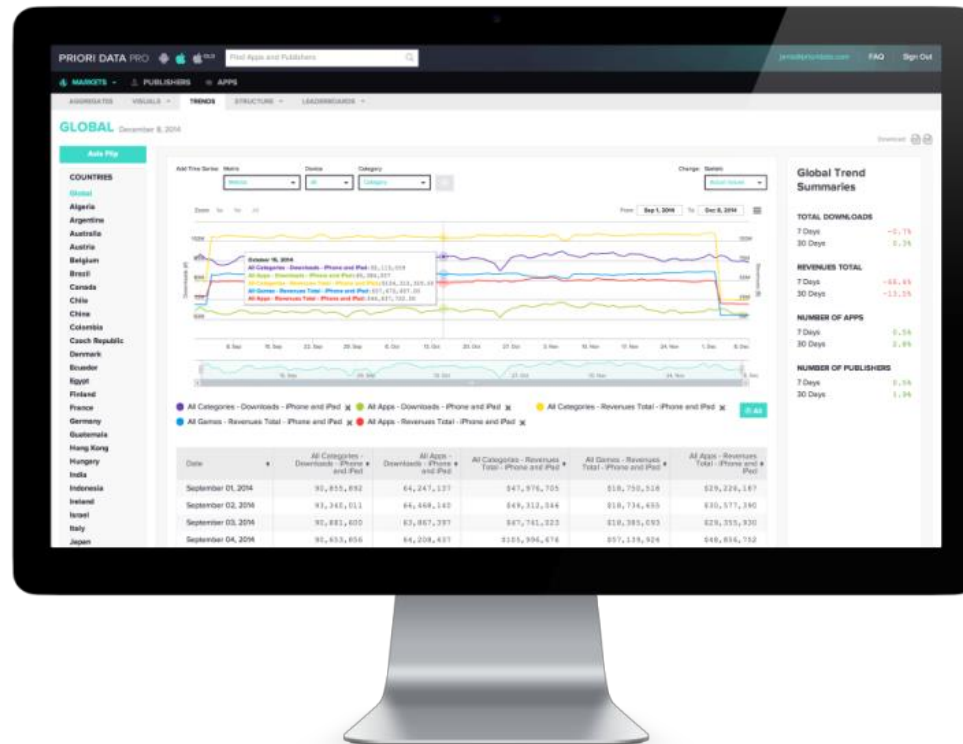
**Download and revenue estimates**  
for all apps, publishers, and  
categories across 57 countries



**COMPETITIVE  
INTELLIGENCE**



**MARKET  
TRENDS**



**NEWCOMER  
DETECTION**



**CUSTOMIZED  
WATCHLISTS**

PRIORI DATA BACKGROUND

## How We Built It: We Partner With Leading Global Players

### Social / Music / Entertainment:



### News & Reference:



### E-commerce:



### Gaming:



### Health & Fitness / Finance:



### Travel & Navigation:



### Sports / Kids / Food:



**Why is any of this important?**

**PRIORI DATA**  
Quantify the app economy.

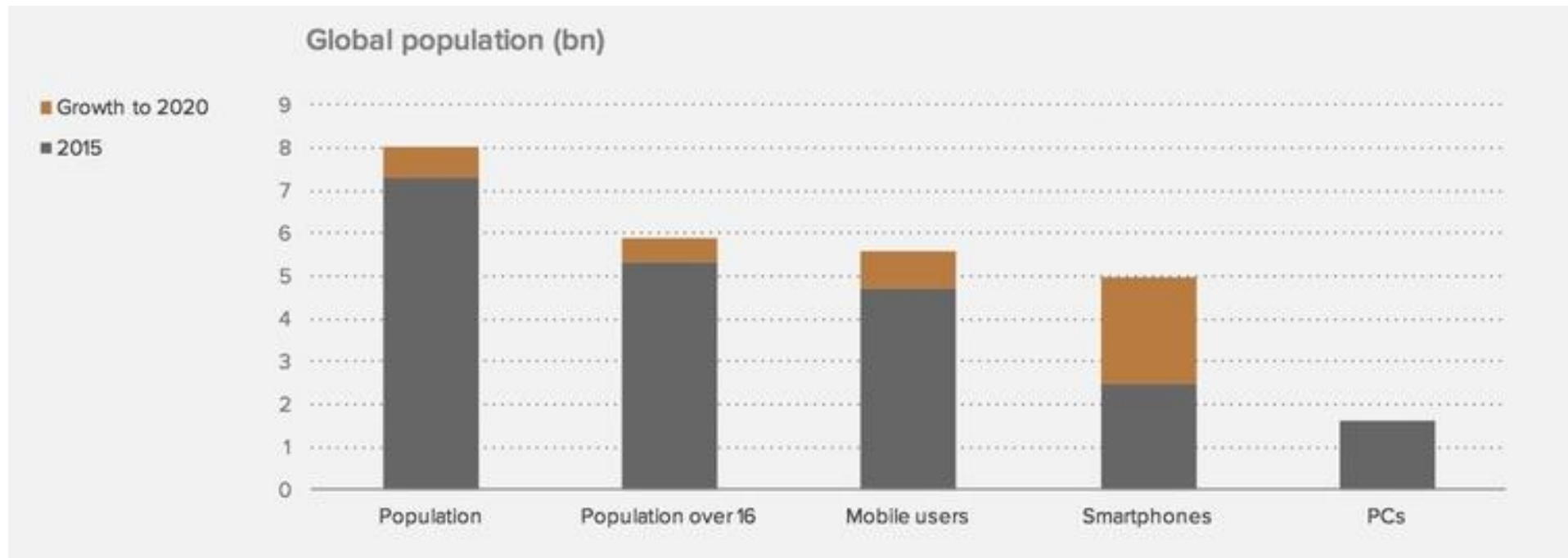
## **2.** **THE MOBILE ECONOMY**



THE MOBILE ECONOMY

## Smartphones are a Universal Technology

From nonexistence in early 2000s to 5 billion by the end of this decade

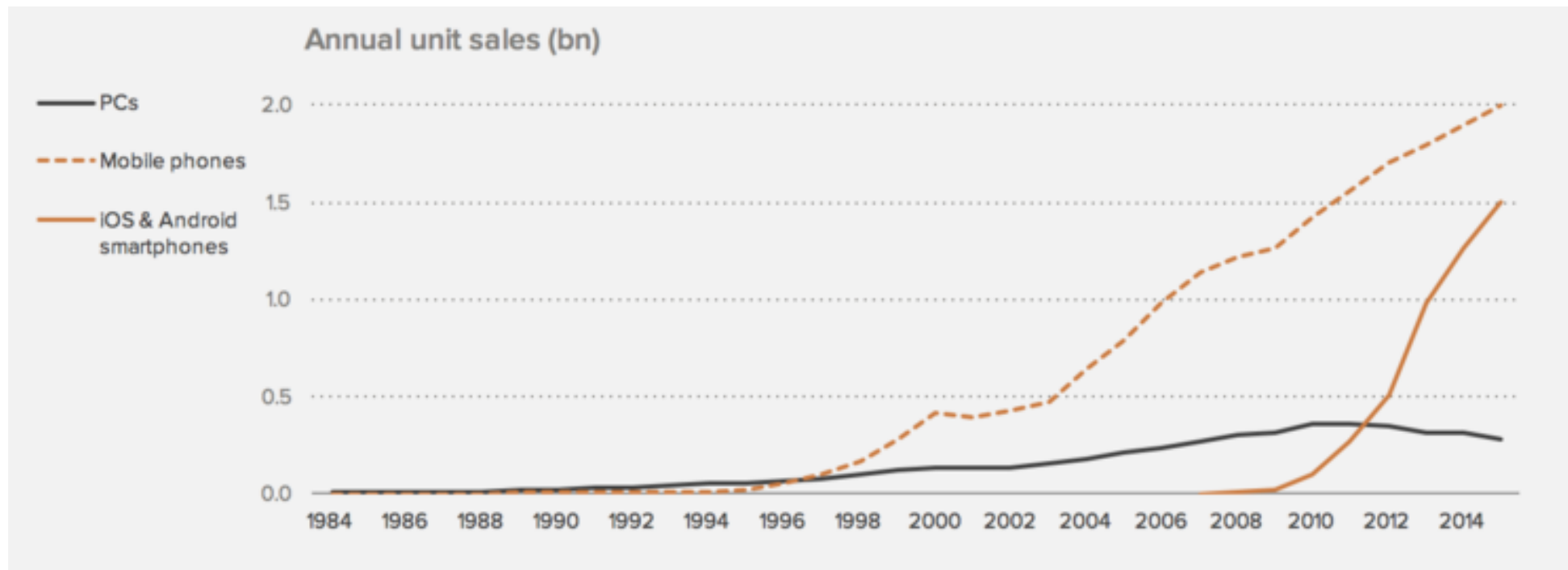




## THE MOBILE ECONOMY

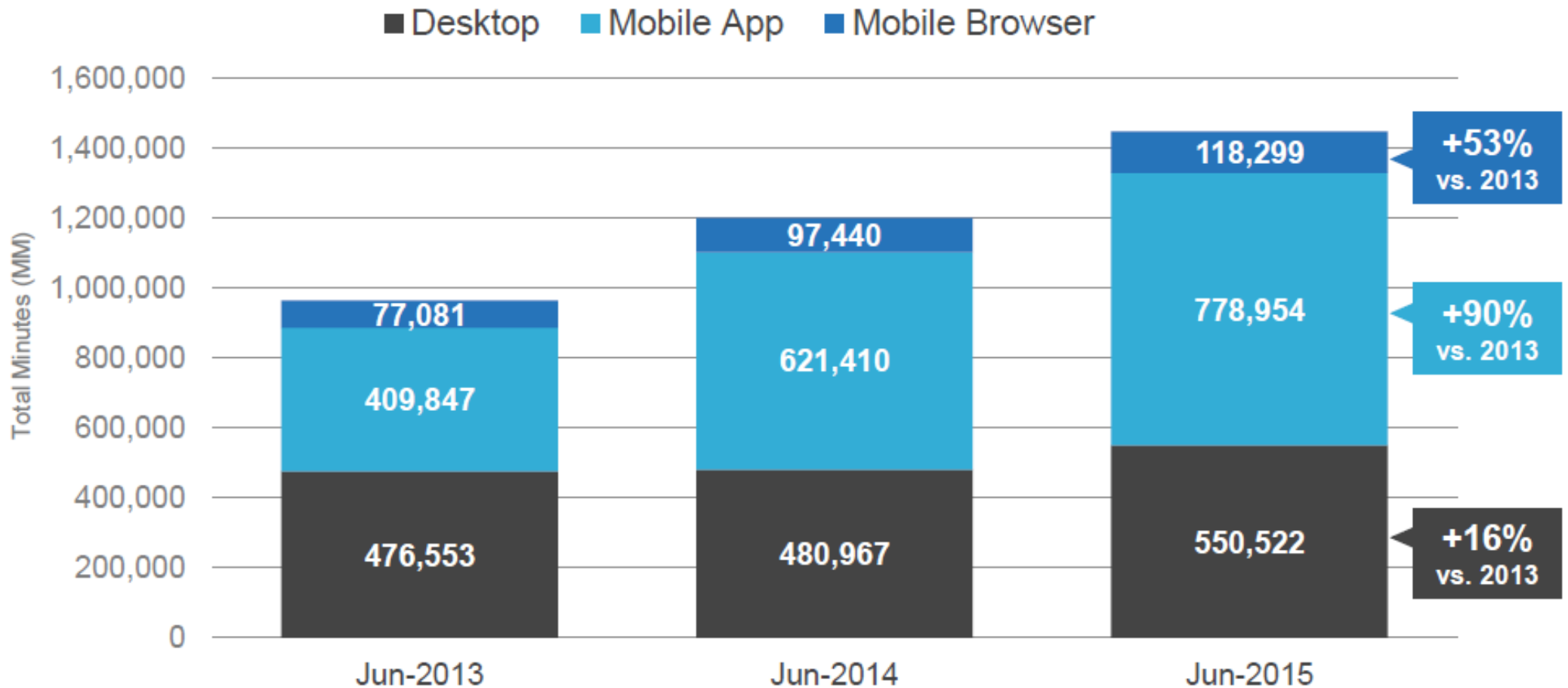
# Mobile is the New Scale, and is now 4x PCs

Past 10 years: Exponential growth for smartphones while PC sales remain almost flat



THE MOBILE ECONOMY

## Time Spent on digital media is increasing, Apps are dominating



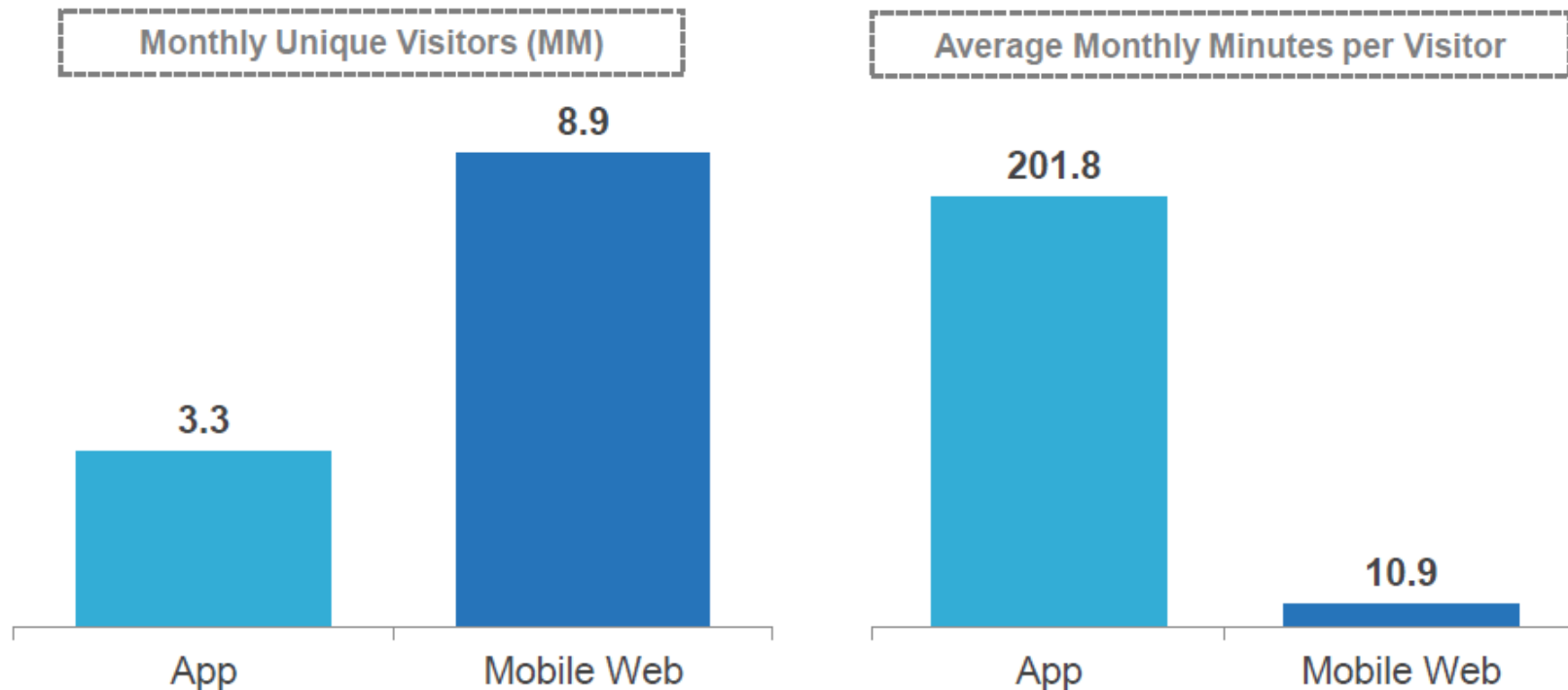
Source: <https://www.comscore.com/Insights/Presentations-and-Whitepapers/2015/The-2015-US-Mobile-App-Report>

THE MOBILE ECONOMY

# Users spend 20 times more time on apps than on web browsers

## Top 1000 Mobile Apps vs. Top 1000 Mobile Web Properties

Source: comScore Mobile Metrix, U.S., Age 18+, June 2015



Source: <https://www.comscore.com/Insights/Presentations-and-Whitepapers/2015/The-2015-US-Mobile-App-Report>

THE MOBILE ECONOMY

# Not Web vs. Mobile, Web & Mobile

	Web	Apps
Reach	A broad scope, low retention	Narrow scope, higher retention
Customer type	High number of visitors but less loyal	Lower number of visitors but more loyal
Cost	Low cost, easy to maintain	Higher cost, harder to maintain
Spending	Customers spend big, but less frequently	Customers spend small, but more frequently
Advantages	Gain customers	Retain customers

**PRIORI DATA**  
Quantify the app economy.

### 3.

# **TODAY'S LANDSCAPE FOR CLASSIFIED APPS**





CLASSIFIEDS

## Top 5 most downloaded classifieds apps which were on the web first



**Craigslist.com**

Free, insertion fee for some categories



**ebayclassifieds.com**

Standard insertion fee



**olx.com**

Free with the option of paid promoted posts



**gumtree.com**

Mostly free, insertion fee for some categories + display adds



**backpage.com**

Mostly free, fee for promoting posts in multiple cities



CLASSIFIEDS

## Top 5 most downloaded classifieds apps which are mobile native



**Wallapop**

Free



**Shpock**

Free



**Offerup**

Free



**letgo**

Free



**5miles**

Free



CLASSIFIEDS

## App launch dates

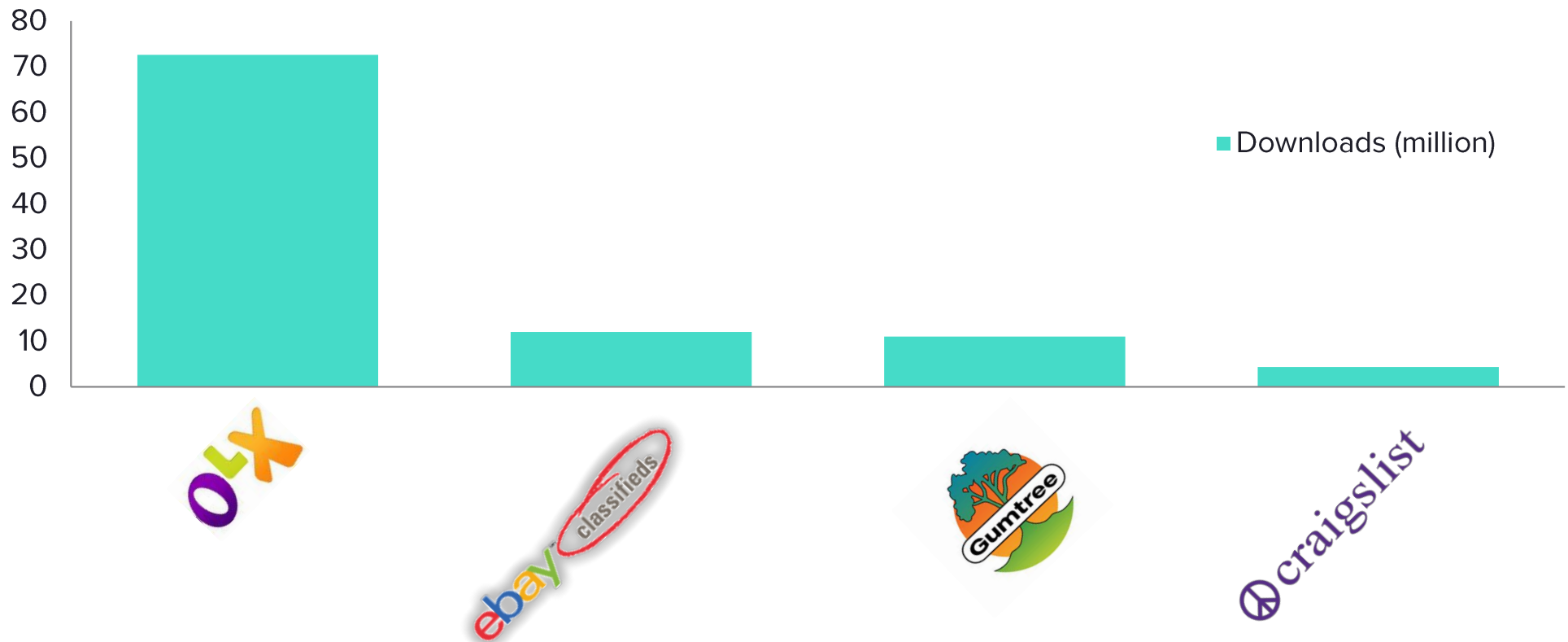


Source: Priori Data

CLASSIFIEDS

## Top apps globally – web first

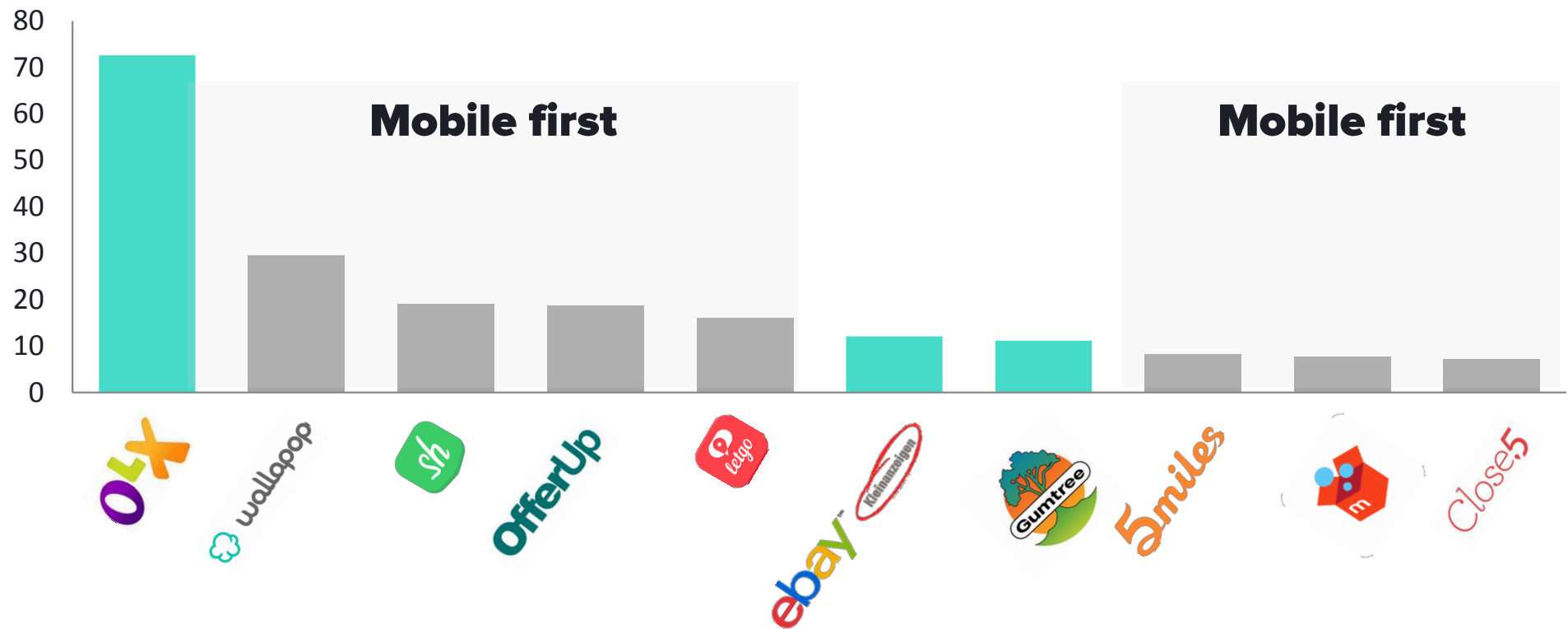
Jan, 2015 – April, 2016



CLASSIFIEDS

## Top classifieds apps globally – top 10

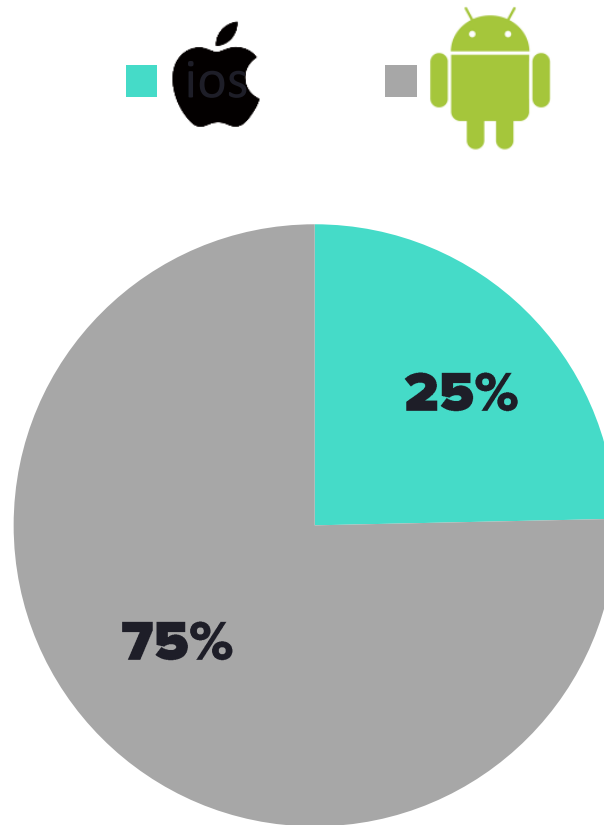
Jan, 2015 – April, 2016





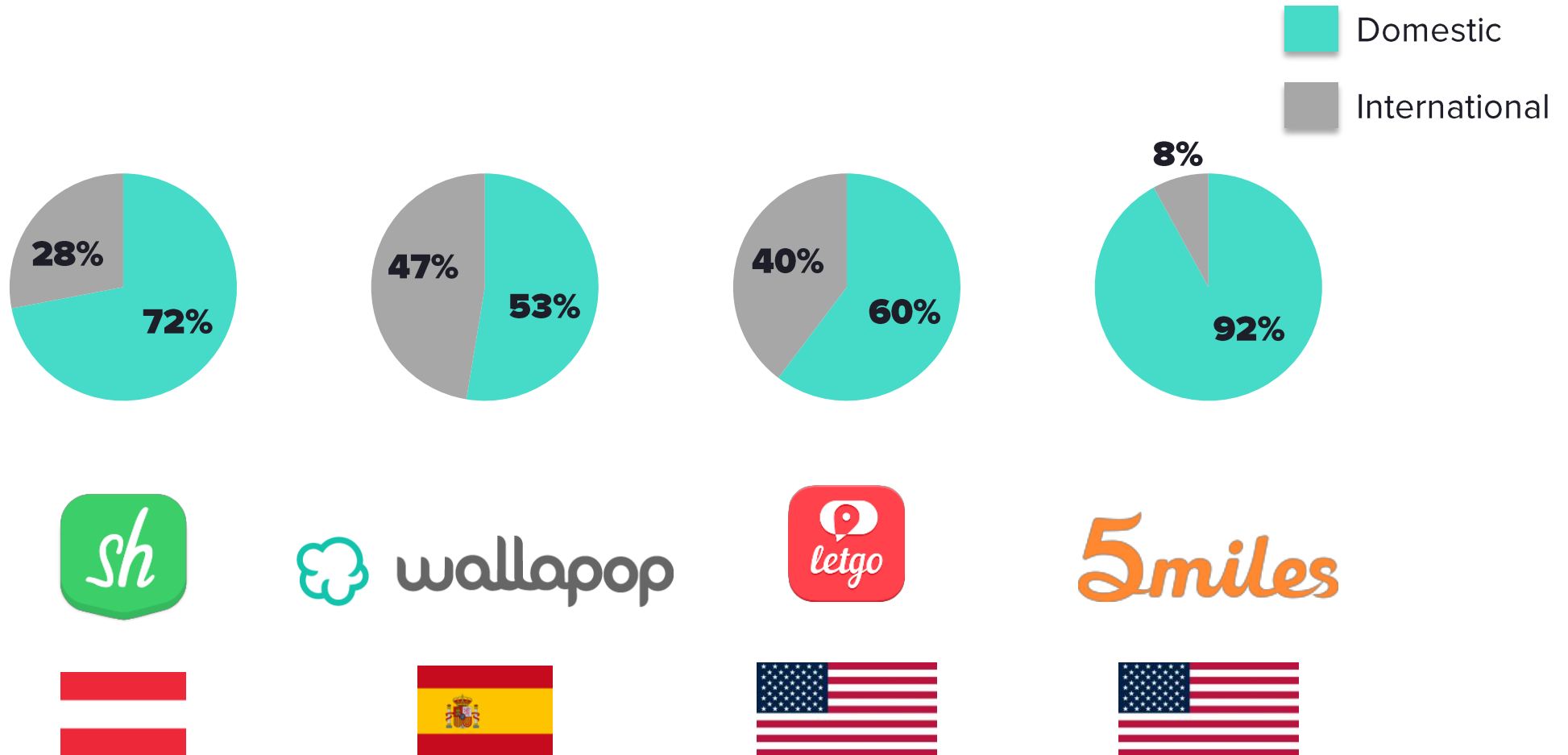
CLASSIFIEDS

## Classified Android apps have 3 times more downloads than iOS



CLASSIFIEDS

## Apps dominate in their local markets



## CLASSIFIEDS

# Growth Has Driven Market Consolidation

### Acquisitions:

- Rumgr bought by eBay (2014) renamed Close5.
- YardSale bought by Gone (2015).

### Failures:

- Eggdrop: Failed in October, 2012 after having .5 million downloads in March, 2012 due to lack of funding.

### Investments:

- Naspers invested in letgo in a \$100 million round; 2015, September.
- Norway's Schibsted Classifieds Media increased its stake in Shpock's parent firm Finderly from 82% to 91% in September, 2015.

**The eBay umbrella:** eBay owns multiple brands in different countries.



**PRIORI DATA**  
Quantify the app economy.

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