The U.S. Parental App Market 2015

When parents are never alone

18th of June 2013

Key facts of the *U.S. Parental App Market 2015* report

1. It is the only available app market report on parental apps with details on:
   a) Market forecast until 2015
   b) Categorization of parental app market by app types
   c) Profiles of key market players
   d) Profiles of best-in-class parental apps
   e) Detailed analyses per operating system, device type, app category and business model
   f) Development of the supply and demand until 2015
   g) Market size until 2015, with details on the most successful operating system, app category and revenue source

2. Easily comprehensible information:
   a) Graphical presentation of the slides content
   b) Detailed data is shown in addition to the charts
   c) Chart slides provide additional explanations and interpretation

3. The report is addressed to:
   a) Parental app publishers
   b) VCs and other funding organizations
   c) Healthcare & pharma companies

4. Pages: 99

5. Publishing date: 18th of June 2013

The report covers the market for apps that support parents with their babies in the USA (scope)

Definition:

Parental apps target parents of 0-3 year old children. They support the parents in their daily care of their babies. For example parental apps could include reminders of vaccinations, a diary, a weight tracker and general tips & tricks.
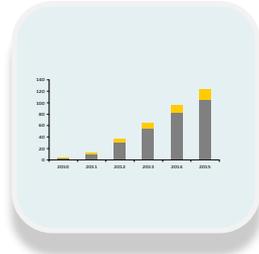
Market size:

The report analyzes and forecasts the addressable market and market size for parental apps until 2015. The covered timeframe is 2010 – 2015.

Platform:

The report covers all major mobile operating systems including iOS, Android and Windows Phone.
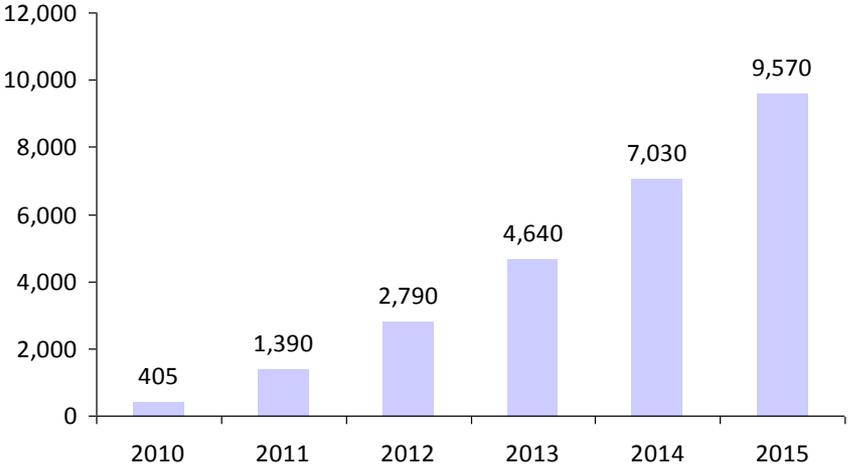
Country:

The country in scope is USA

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Parental apps offer high monetization opportunities

Total number of parental apps

Year	Number
2010	405
2011	1,390
2012	2,790
2013	4,640
2014	7,030
2015	9,570

Mobile apps that accompany parents during the first years of their children's life are a niche market in the app-economy. Nevertheless, they represent an app category which has one of the highest relevancies for their users. They can become an important part of the daily life of mothers and fathers.

Mobile apps that support parents to securely raise their children are of high value. App developers can build their apps upon strong mobile use cases like:

- **Never miss a moment**: There is a strong demand for capturing every important and not so important moment of a baby's life. Diary apps help parents to capture the first smile, the first word etc., comment, organize and share those captures.

- **Peace of mind**: To get immediate access to information and guidance on e.g. vaccinations, diseases and "how-to" guides is a powerful mobile use case for parents.

- **Quantified self**: How much a baby grew over time or how often a baby eats are topics that most parents carefully follow. Tracking apps support parents to measure, track and visualize core body KPIs (e.g. weight and height) or food intake in a very convenient way.

Parental apps can become a permanent companion during the first years of the life of a baby. Monetization chances are high because of daily multi-time usage, high brand awareness, high relevance and the intrinsic sharing need of parents. Because of that parental apps should on average be better suited to charge higher app download prices, generate in-app advertisement and purchase revenues compared to apps of other categories.

The total number of parental apps will exceed 9,500 by 2015, which illustrates the intensifying competition in this niche market. At the same time, the high competition is matched by the high demand from parents, as demonstrated by the 124 million downloads for parental apps by 2015 and a multimillion USD market. Also, Apple's platform will remain the biggest market for parental apps in the U.S. until 2015.

We use 4 different data visualization tools to illustrate the facts and trends of the *U.S. Parental App Market 2015*

Tables

- **25 tables**
- Used for illustrating the profiles of key market players and the characteristics of parental app categories

Profiles

- **10 profiles**
- Used for giving examples of best practice parental apps

Diagrams

- **13 diagrams**
- Used for displaying app numbers, average prices per download etc.

Trend charts

- **15 charts**
- Charts show parental app numbers, market revenue, downloads etc. within the timeframe between 2010-2015.

The report describes 33 key parental app publishers
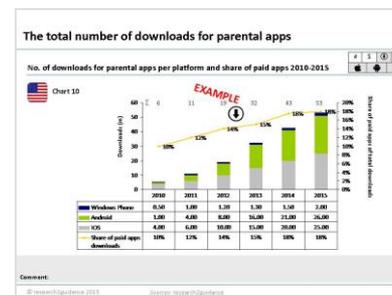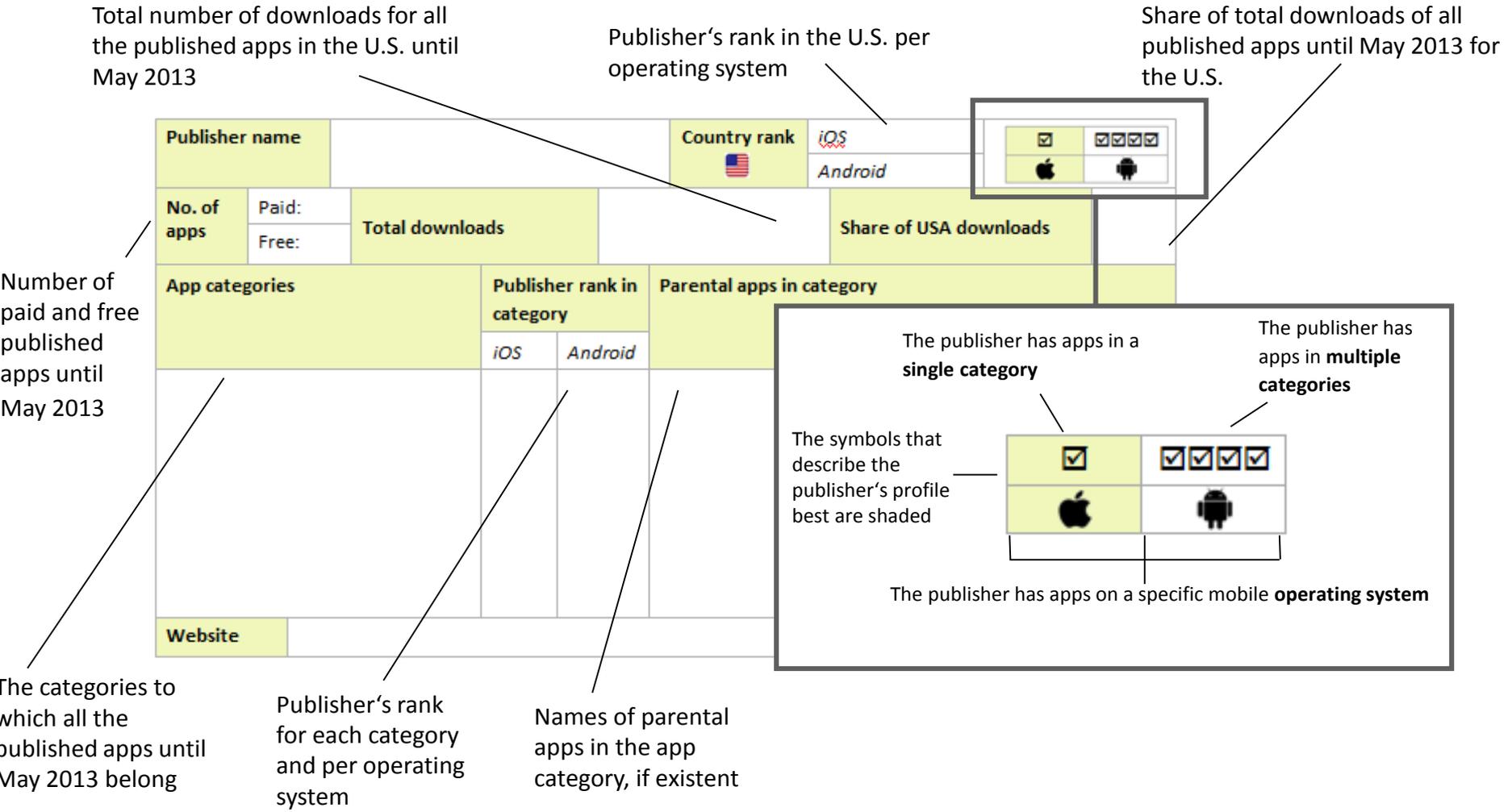
App publisher profile (key market player)

Total number of downloads for all the published apps in the U.S. until May 2013

Publisher's rank in the U.S. per operating system

Share of total downloads of all published apps until May 2013 for the U.S.

Publisher name				Country rank 🇺🇸	iOS	☑	☑☑☑☑
					Android	🍎	🤖
No. of apps	Paid:	Total downloads			Share of USA downloads		
	Free:						
App categories		Publisher rank in category		Parental apps in category			
		iOS	Android				
Website							

Number of paid and free published apps until May 2013

The categories to which all the published apps until May 2013 belong

Publisher's rank for each category and per operating system

Names of parental apps in the app category, if existent

The symbols that describe the publisher's profile best are shaded

The publisher has apps in a **single category**

The publisher has apps in **multiple categories**

☑	☑☑☑☑
🍎	🤖

The publisher has apps on a specific mobile **operating system**

The parental app profiles illustrate the characteristics of some of the most successful apps from all categories and for all platforms analysed throughout the report

Parental app profile (best-in-class solutions)

App name and logo

Snapshots of the app

Sources

Parental app category and platforms on which the app is available

General description of the app

Features incorporated in the app

My Baby Today is a successful guide app that allows users to access a wide variety of information on child care

My Baby Today

Category: Guides — iPhone

Business Model	Release Date	Rating
Free	12.10.2011	★★★★★ (7,571 ratings)

Description

The app provides new parents with advice, reminders and tracking tools of their baby´s development.

Functionality

- Personalized daily calendar of the baby´s development
- Updatable checklist and reminders
- Built-in photo album
- Information on baby´s health and safety
- Suggested activities for the baby each week
- Advice on care and feeding

© research2guidance 2013   Sources: Apple App Store, appannie.com   13

The app profile pages provide information on best practice parental apps in the U.S. for iOS, Android and Windows Phone.

The report contains 10 such profiles and each profile includes the following information:

- The parental app category to which the app belongs
- Platforms on which the app was published
- The app's business model, release date, rating and the number of reviews on which the rating is based
- Description of the app's main features
- Detailed list of the features the app incorporates

Diagram and chart slides have a similar structure throughout the entire report, allowing for a quick identification of those elements which are of interest

Key finding of the chart ———

Chart description ———

Symbols that enable the reader to easily understand the content of the chart (in this case, the symbols used are *parents* and *smartphones*)

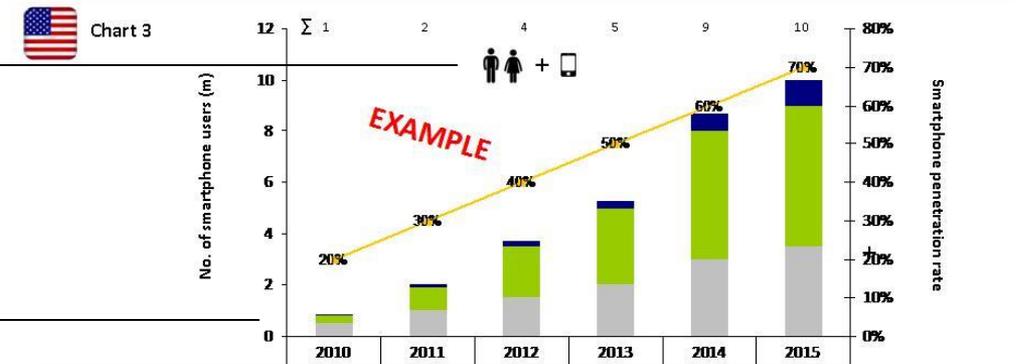**Chart content** ———

Content symbol tracker:
- app numbers
- revenue
- downloads
- addressable market
- operating systems

Smartphone penetration will reach X% within the target group in 2015

No. and penetration of smartphone users 2010-2015 within target group

| # | $ | ⊕ | 👤 |
| 🍎 | 📱 | ⊞ |

Chart 3

EXAMPLE

No. of smartphone users (m)

Smartphone penetration rate

	2010	2011	2012	2013	2014	2015
Windows Phone	0.05	0.10	0.20	0.30	0.70	1.00
Android	0.30	0.90	2.00	3.00	5.00	5.50
iOS	0.50	1.00	1.50	2.00	3.00	3.50
Smartphone penetration rate	20%	30%	40%	50%	60%	70%

Comment: The chart shows the penetration of smartphones within the max. target group. In this scenario Windows Phone will gain some market share without major impact on the total market landscape.

© research2guidance 2013   *Sources: research2guidance, comScore, eMarketer, Google, Nielsen, Pew Research Center, Yankee Group*   24

Detailed chart data: estimated numbers for the main information illustrated by the chart

Comments section:
- key results illustrated in the charts
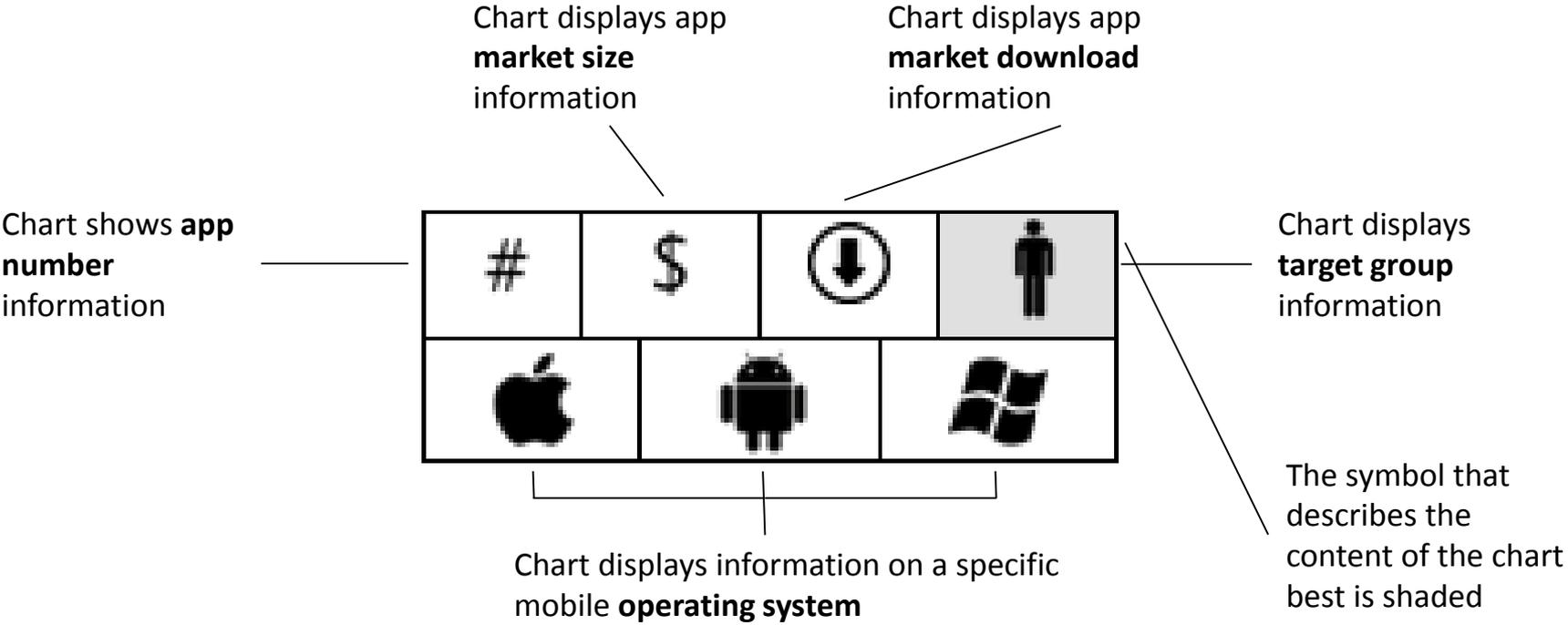- additional explanations
- chart interpretation

Sources section: shows information on the sources which were considered for estimating the numbers behind the chart (in this case, the number of parents and the smartphone penetration rate between 2010-2015)

The content symbol tracker supports orientation within the report

Chart displays app **market size** information

Chart displays app **market download** information

Chart shows **app number** information

Chart displays **target group** information

Chart displays information on a specific mobile **operating system**

The symbol that describes the content of the chart best is shaded

List of charts

List of charts

List of tables and publisher profiles

About research2guidance

research2guidance is a specialist research organization that focuses on providing insights into mobile market developments. Our aspiration is to provide business leaders with guidance and a fact-base that will assist them in better understanding the most important trends shaping mobile markets today.

This report concentrates on the U.S. parental app market, examining the impact of emerging trends and developments on the market.

To access additional research documents on the smartphone applications market, please visit http://www.research2guidance.com/.
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About the authors

Ralf-Gordon Jahns
Ralf is the research director of research2guidance. He has worked for more than 19 years in the telecom and media industry. Prior to research2guidance he a partner and member of the leadership team of Capgemini Telecom Media & Networks. Ralf is a frequent keynote speaker on mobile industry events, publisher of a multitude of mobile app market reports and executive consultant of more than 30 clients in the mobile and app industry.

Contact:

ralf.jahns@research2guidance.com

Fix: +49 (0)30 609 89 3366

Anca Aneculaesei
Anca is a senior research analyst at research2guidance. She worked on more than 10 app market sizing projects in the healthcare and fitness industry. She helped various start-up companies to develop their business model in the app eco-system. She holds a master degree in marketing analysis and strategy.

Contact:

aa@research2guidance.com

Fix: +49 (0)30 609 89 3360

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