

Global Mobile Consumer Trends 2020

moengage  apptopia



Summary: Movements in Q2 vs Q1, 2020

Global Mobile Consumer Trends, 2020

Banking & Fintech **43.67%**

Jump in new user downloads of Banking and Fintech apps in the **United States**. 20% growth in daily active users



Dating **398%**

Boost in daily active users on Dating apps in **India**. 413% jump in downloads by new users



Health & Fitness **54.66%**

Growth in downloads of Health & Fitness apps by new users in the **Middle East and North Africa**



Mobility **-11.31%**

Fall in app sessions for Mobility apps in **Europe**

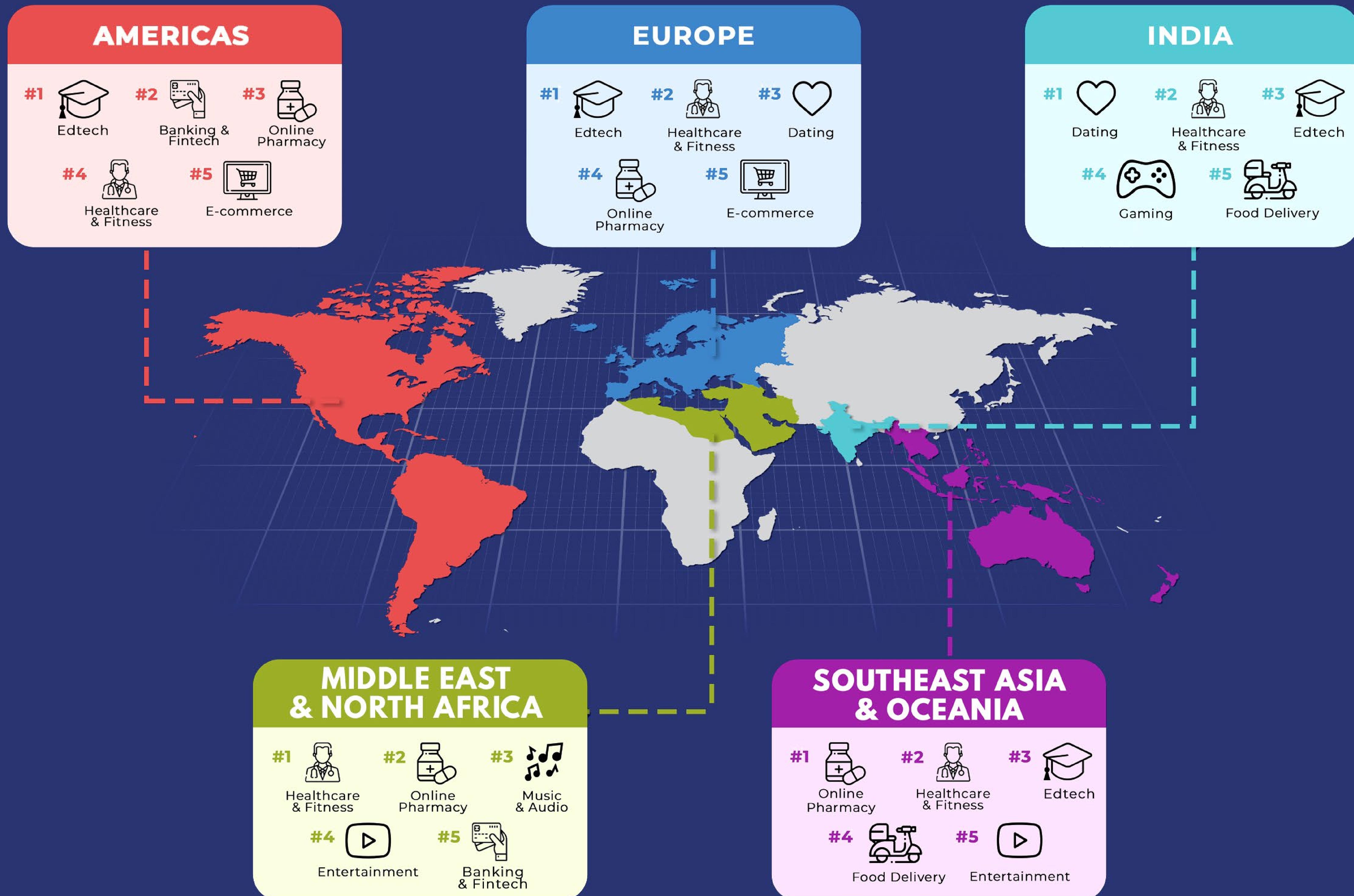


Travel & Hospitality **-14%**

Drop in daily active users on Travel & Hospitality apps in **Southeast Asia Oceania**



Top Performers in Q2 vs Q1, 2020



How To Read This Report

- ▶ You can either go through the report in a sequential manner or directly jump to an industry of your choice from the table of contents.
- ▶ Q1, 2020 refers to the months of January, February, and March, and Q2, 2020 refers to the months of April, May, and June.
- ▶ ‘Downloads’ refers to mobile app downloads from both Google’s Play Store and Apple’s App Store.
- ▶ DAU or Daily Active Users refers to the total number of people who open and engage with a mobile app in a given day.
- ▶ Average Session Duration is the total duration of all sessions (in seconds) / number of sessions.
- ▶ All data shown in this report is relative to Q1, 2020 - percentage movements. All data charts in this report show the relative movement of a metric in Q2, 2020 relative to Q1, 2020.
- ▶ Most graphical data representations in the report are collected through all the apps in the associated Play Store/App Store category.
- ▶ Few industries in the report display graphical movement in Q2 vs Q1. This is made by taking a representative set of apps in the associated Play Store/App Store category.

Introduction

“In God we trust, all others must bring data.”
- W. E. Deming

A lot has happened in 2020. We started the year in a festive mood. Travel & hospitality were cashing in on Q1 earnings and then the Covid-19 pandemic hit us.

Similar to most other global recessions, the Covid-19 linked recession hit businesses around the world. As countries entered into various levels of lockdown and shelter-in-place, industries such as **Travel, Hospitality and Mobility were hit pretty hard.**

While the digitally savvy industries such as **Media & Entertainment, Social Media, E-commerce, Food Delivery and Gaming continue to grow in strength**, it is the increase in digital adoption of products and services that were predominantly considered offline that is a pleasant surprise.

Gyms, grocery chains, pharmacies, real estate and even banks have almost overnight grown their digital footprint. These offline-turned-online businesses have not only onboarded millions of users in the past 6 months but also continue to **sustain customer interest by delivering value and engaging users effectively.**

While management consultants are trying to analyze and make sense of the widening business impact of Covid-19, MoEngage and Apptopia bring you the **actual data from Q2, 2020** - data that reflects consumer confidence trends in different industries. Data that highlights shifts and **helps you prepare for the future.**

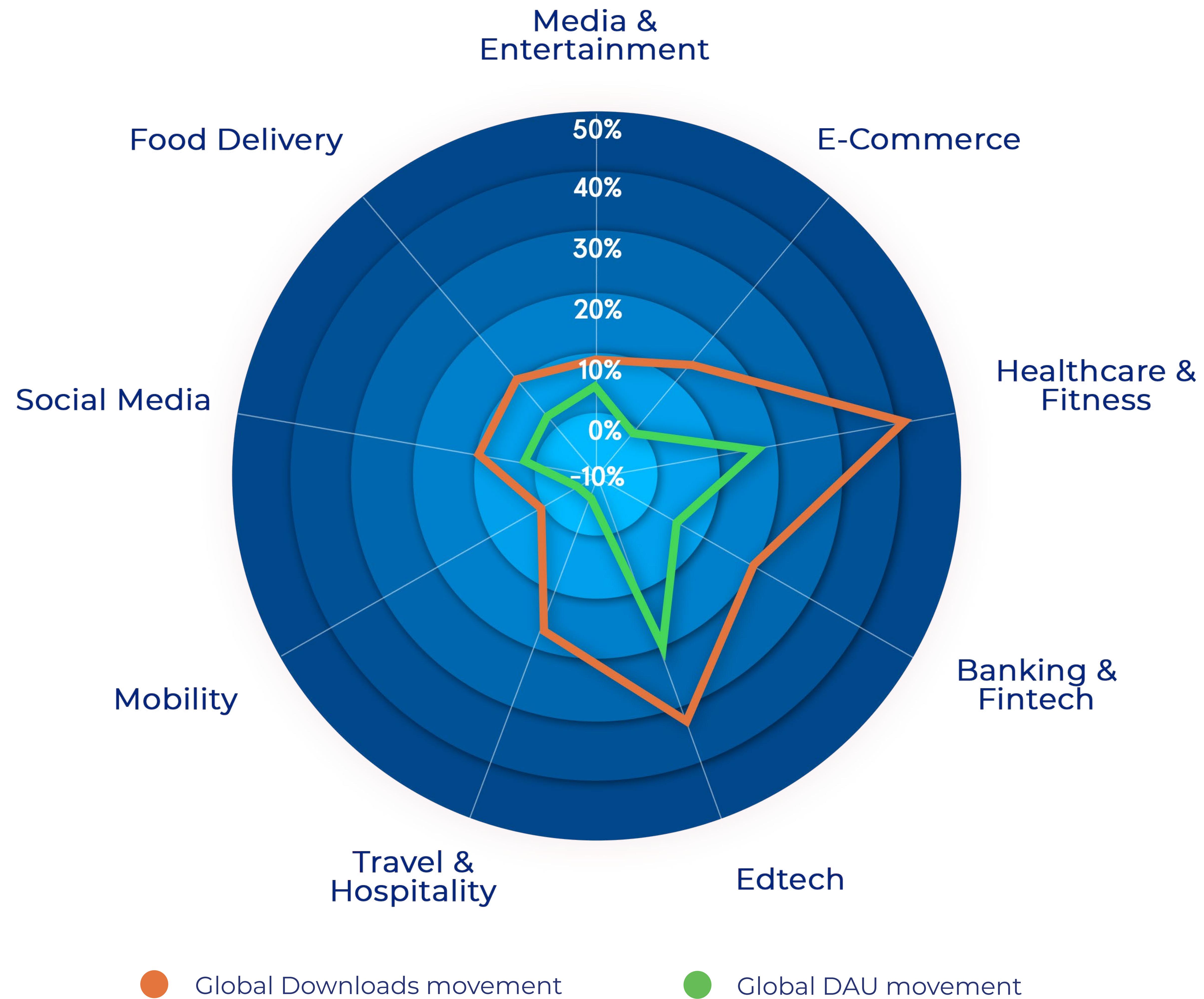
We have identified data patterns of 1.5 billion mobile app users spread across **5 different geographical regions**. In this report, we have covered **9 different industry** verticals and **6 sub-verticals**.

In a snapshot, **all industries** except Travel, Hospitality and Mobility are **neutral or see a positive growth** in downloads and daily active users.

Explosion	Growth	Slowdown
High downloads and daily active users Edtech Health, Fitness & Online Pharmacy Banking & Fintech	Flat to high growth in downloads and daily active users E-commerce Social Media Food Delivery Media & Entertainment	Drop in downloads and daily active users Travel & Hospitality Mobility

Global Mobile Consumer Trends

Radar Chart (Q2 vs Q1, 2020)



AMERICAS

Downloads **6.03%**
DAU **1.17%**



MIDDLE EAST & NORTH AFRICA

Downloads **9.99%**
DAU **3.43%**

EUROPE

Downloads **6.21%**
DAU **1.82%**



INDIA

Downloads **11.52%**
DAU **7.99%**



SOUTHEAST ASIA + OCEANIA

Downloads **2.20%**
DAU **1.38%**

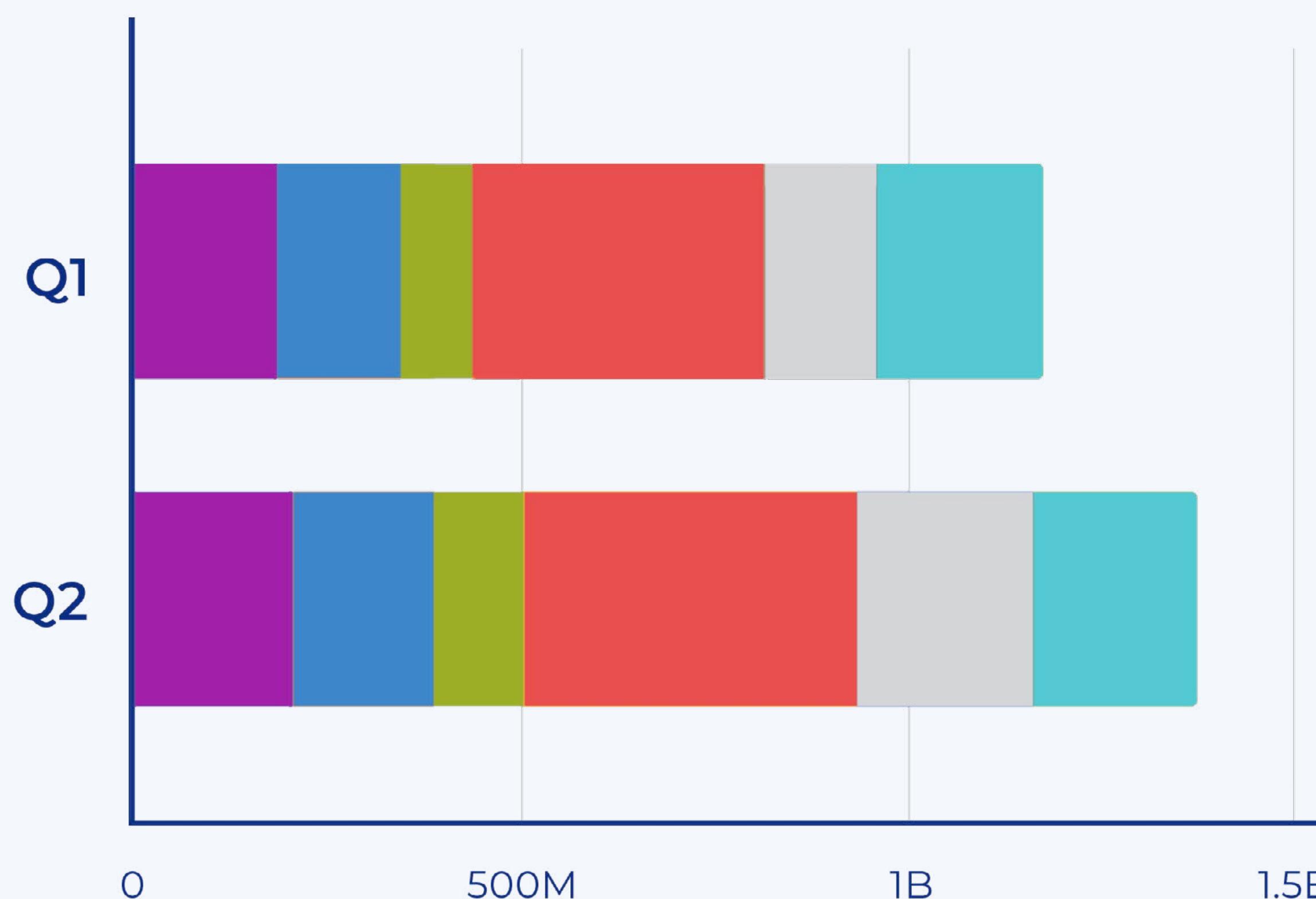


*All data above is from Q2, 2020 relative to Q1, 2020

Entertainment and Video Streaming (OTT video)

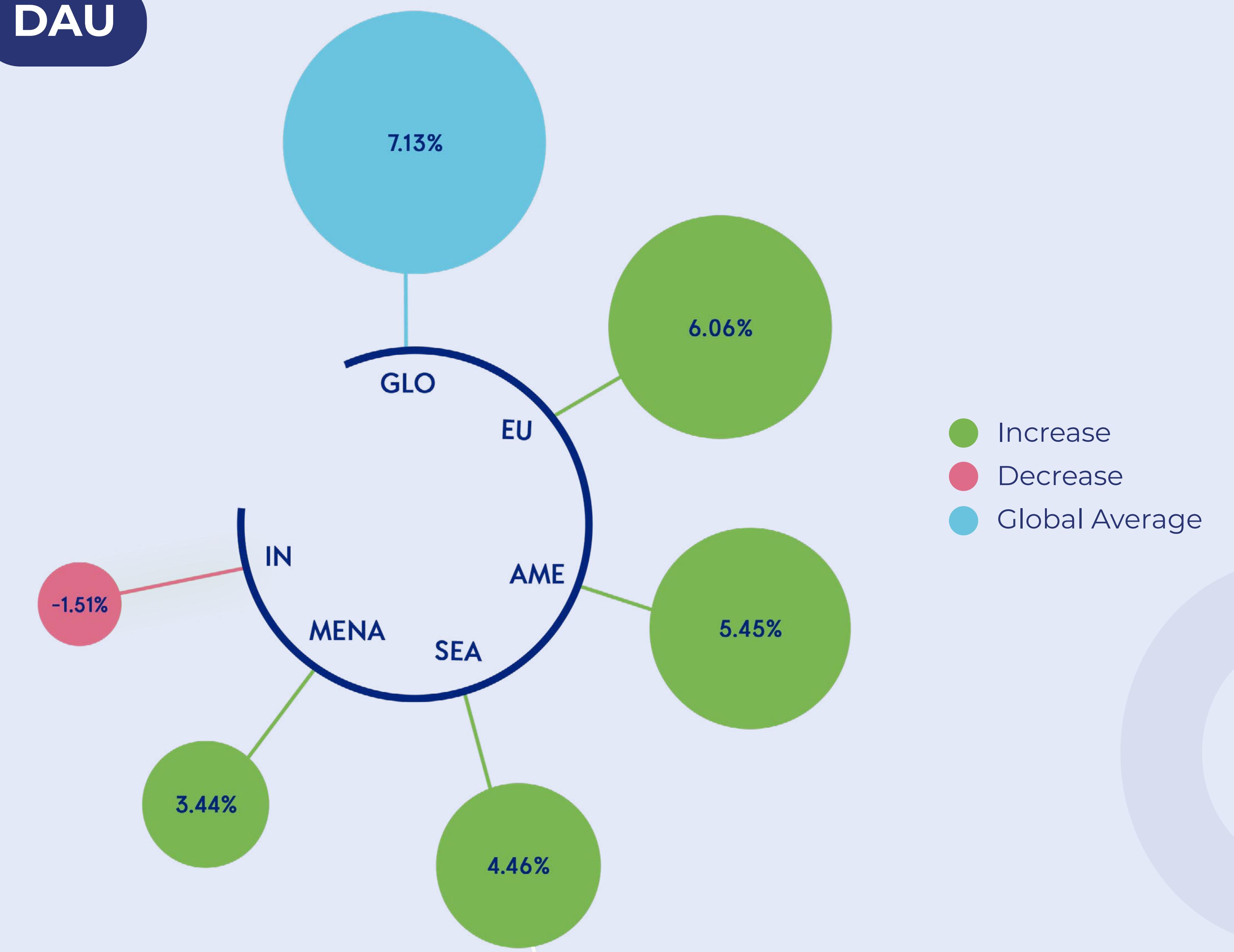
Global Movements (Q2 vs Q1)

Downloads



● SEA (10.81%)
 ● EU (15.72%)
 ● MENA (19.72%)
 ● AME (14.73%)
 ● ROTW (22.49%)
 ● IN (-1.82%)
 Global (16.80%)

DAU



SEA : Southeast Asia + Oceania EU : Europe MENA : Middle East and North Africa AME : Americas IN : India GLO : Global ROTW : Rest Of The World

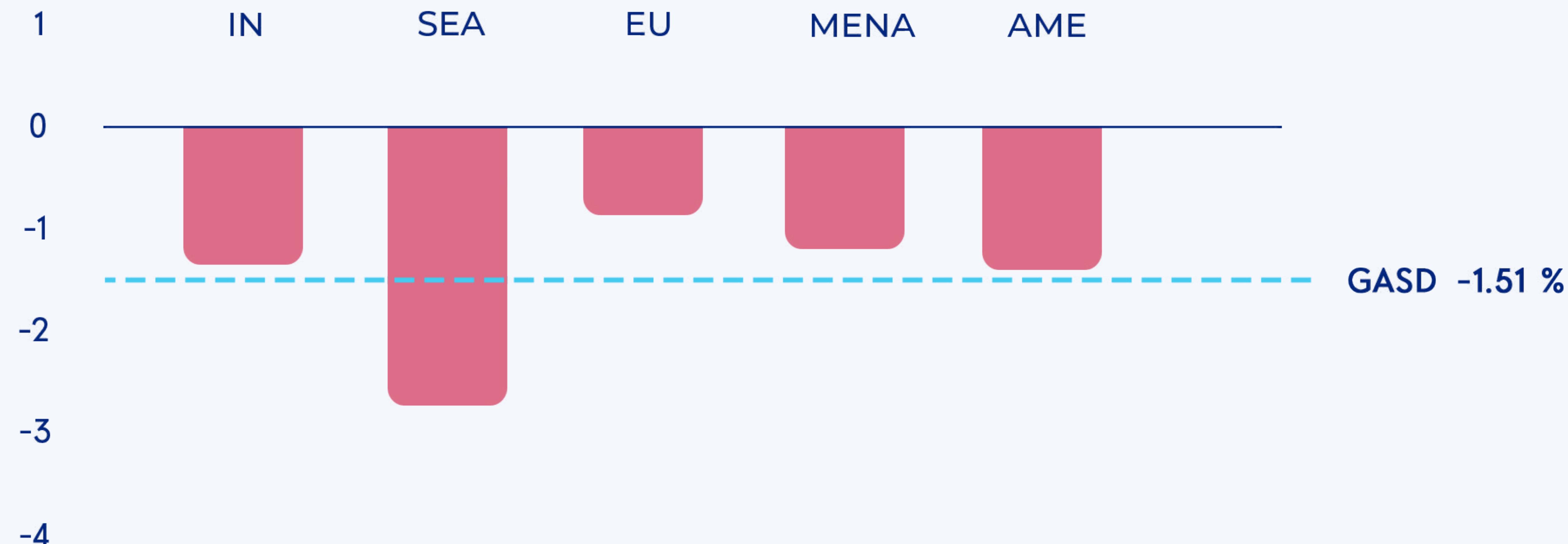
- Countries in the Middle East and North Africa, Europe and the Americas had the highest number of new users for video streaming (OTT video) apps.
- The Middle East and North African region has seen the highest increase in downloads (19.72%), which is higher than the global average (16.80%).

- Growth in user activity was the highest in Europe (6.06%), followed by the Americas (5.45%).
- India was the only region to see a slight decrease in both new and active users. However, India has seen an increase in the frequency of use of OTT video apps.

Entertainment and Video Streaming (OTT video)

Global Movements (Q2 vs Q1)

Session Duration



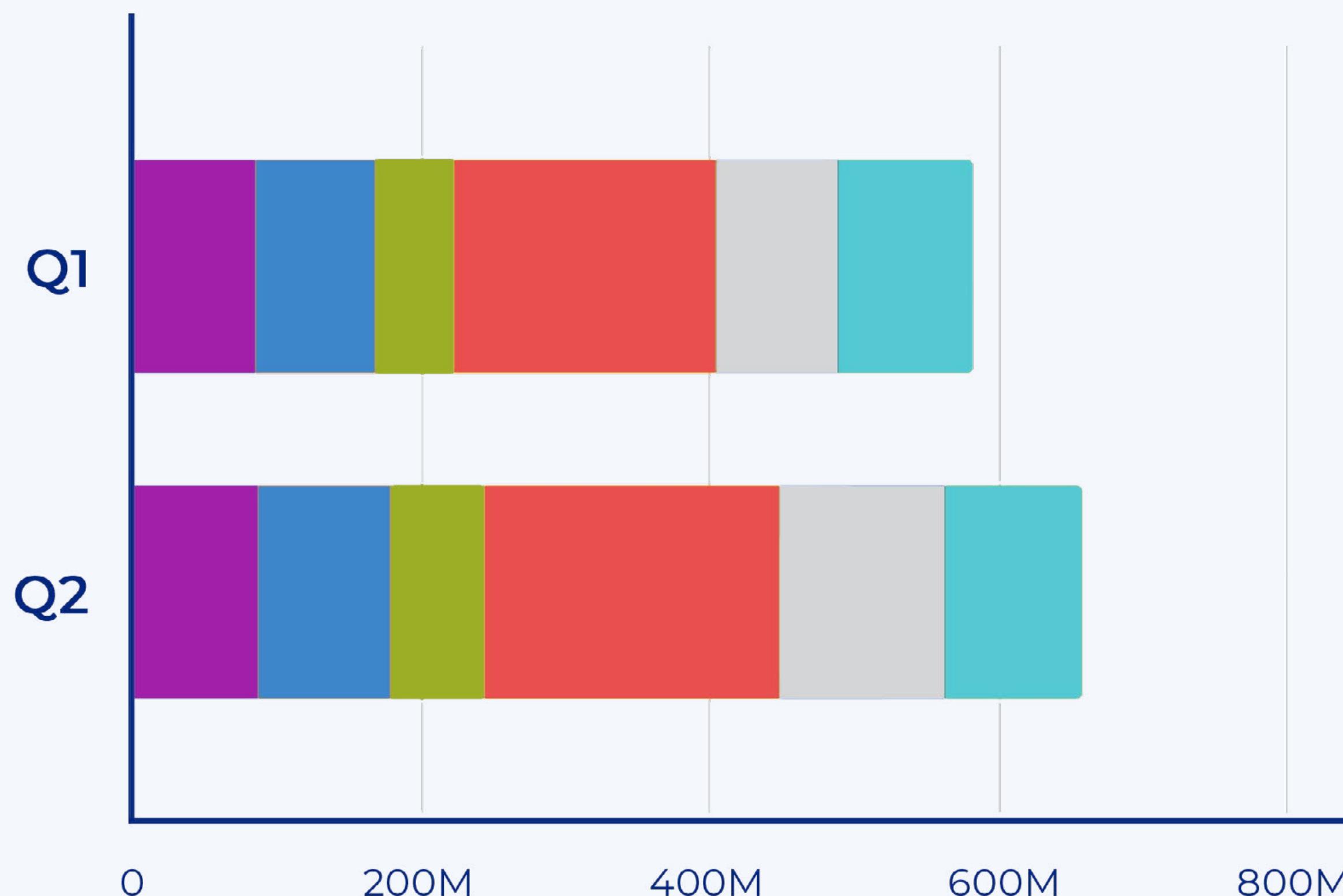
SEA : Southeast Asia + Oceania EU : Europe MENA : Middle East and North Africa AME : Americas IN : India GASD : Global Average Session Duration

- Europe has seen the smallest decrease in the average session duration (-0.96%).
- Southeast Asia has seen the largest fall in the average session duration (-2.75%).

Music and Audio Streaming (OTT audio)

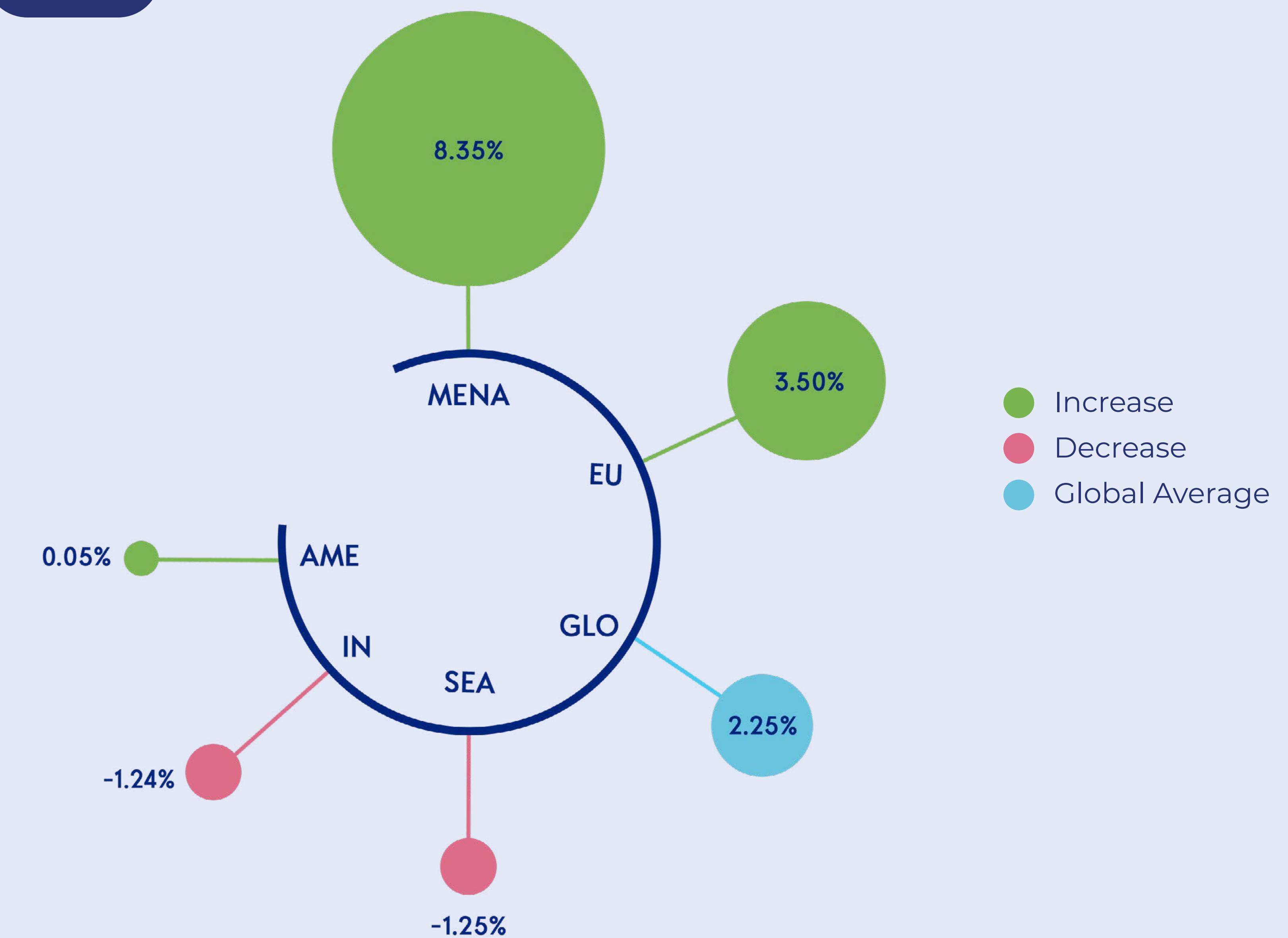
Global Movements (Q2 vs Q1)

Downloads



SEA	(2.35%)
EU	(11.85%)
MENA	(17.93%)
AME	(12.23%)
ROTW	(35.01%)
IN	(2.35%)
Global	(13.03%)

DAU



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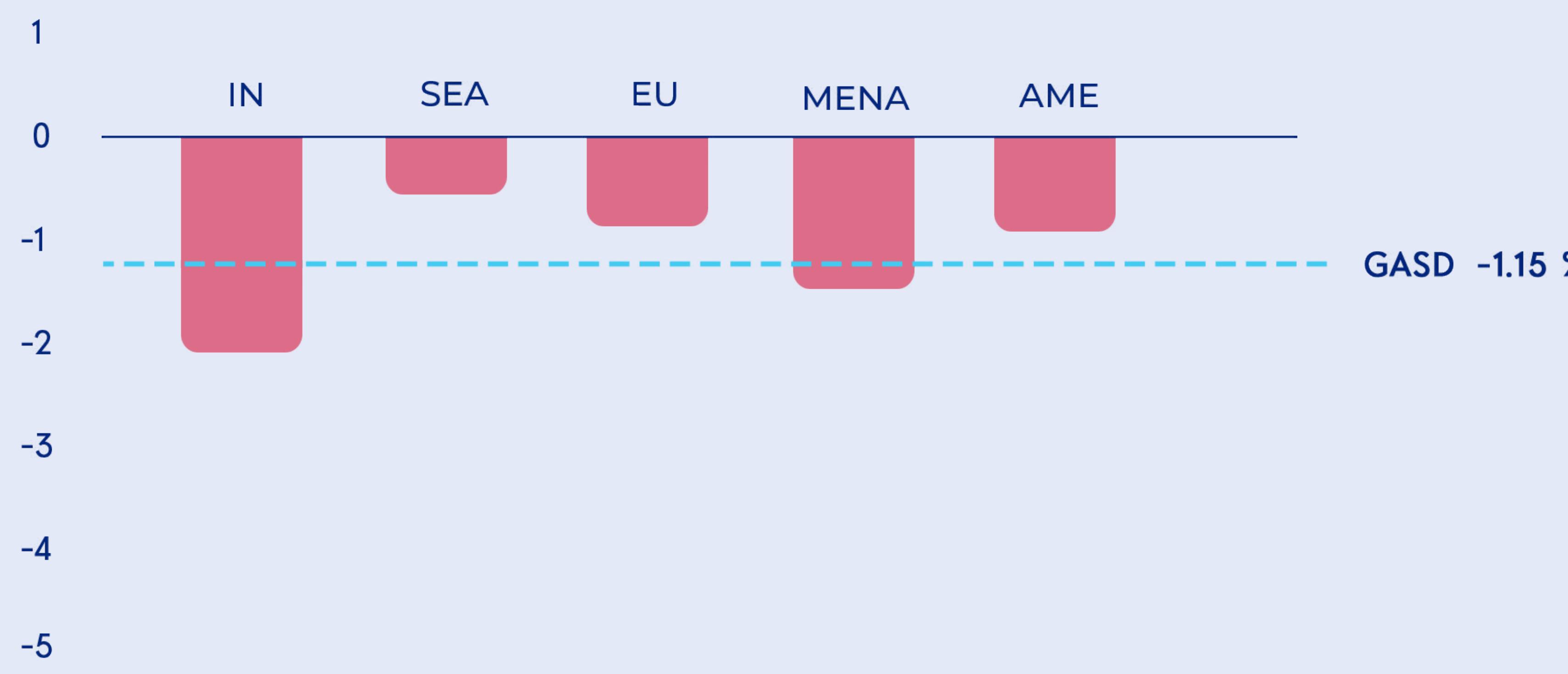
- India, Southeast Asia and Oceania have seen an increase in the number of new users but a slight decrease in daily active users.
- Although the number of active users in the Americas was more or less the same, the number of new users has significantly increased (12.24%).

- The Middle East and North Africa region has seen the highest growth in new users (17.94%) and active users (8.35%), which is higher than the global average for both these categories (13.03% and 2.25% respectively). In fact, the frequency of usage has also increased the most in this region (5.83%).

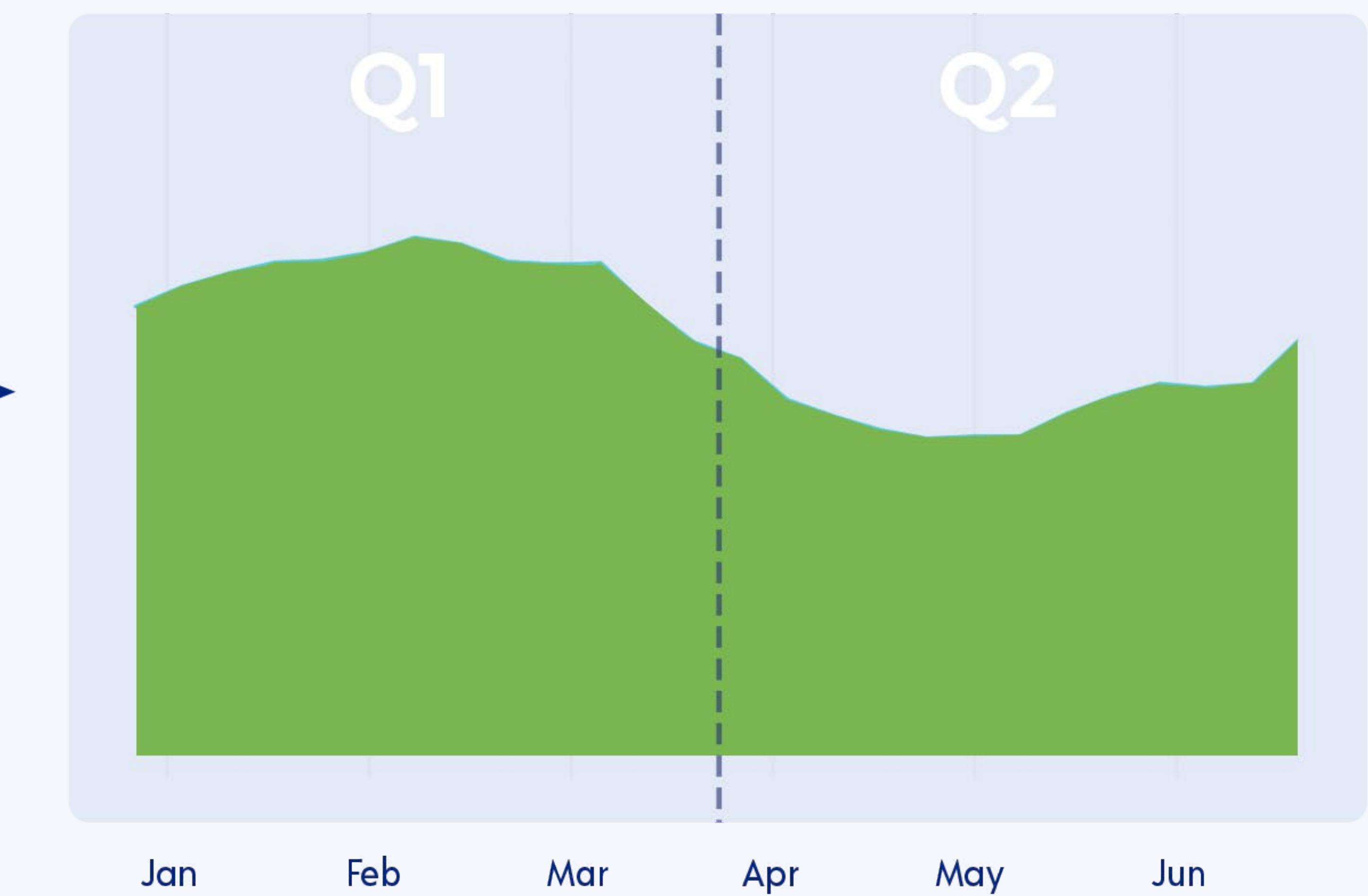
Music and Audio Streaming (OTT audio)

Global Movements (Q2 vs Q1)

Session Duration



DAU



Source: MoEngage
Region: India

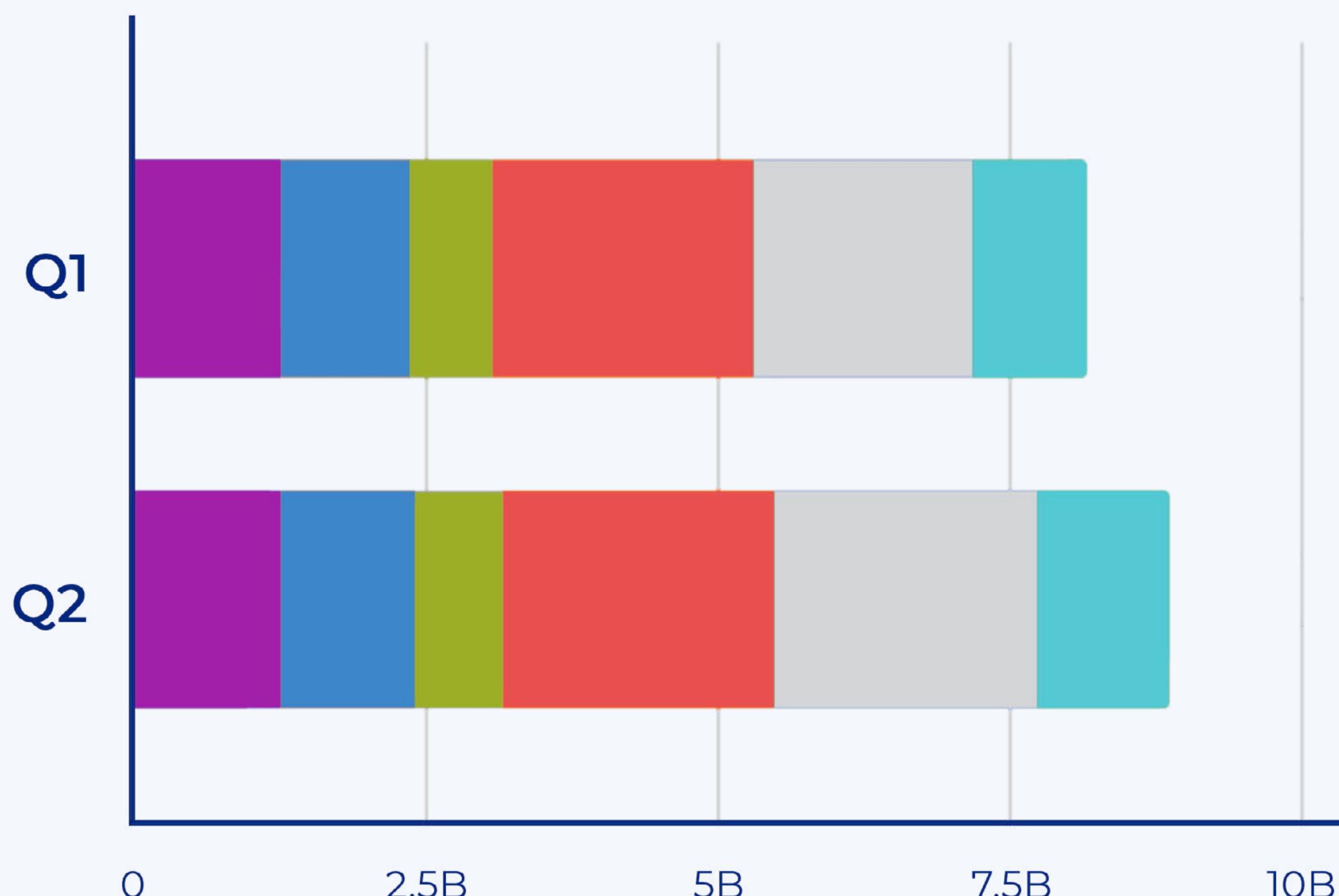
SEA : Southeast Asia + Oceania EU : Europe MENA : Middle East and North Africa AME : Americas IN : India GASD : Global Average Session Duration

- Session duration has decreased consistently across all the regions.
- The highest fall in session duration was in India (-2.03%), followed closely by Middle East and North Africa (-1.52%).

Gaming

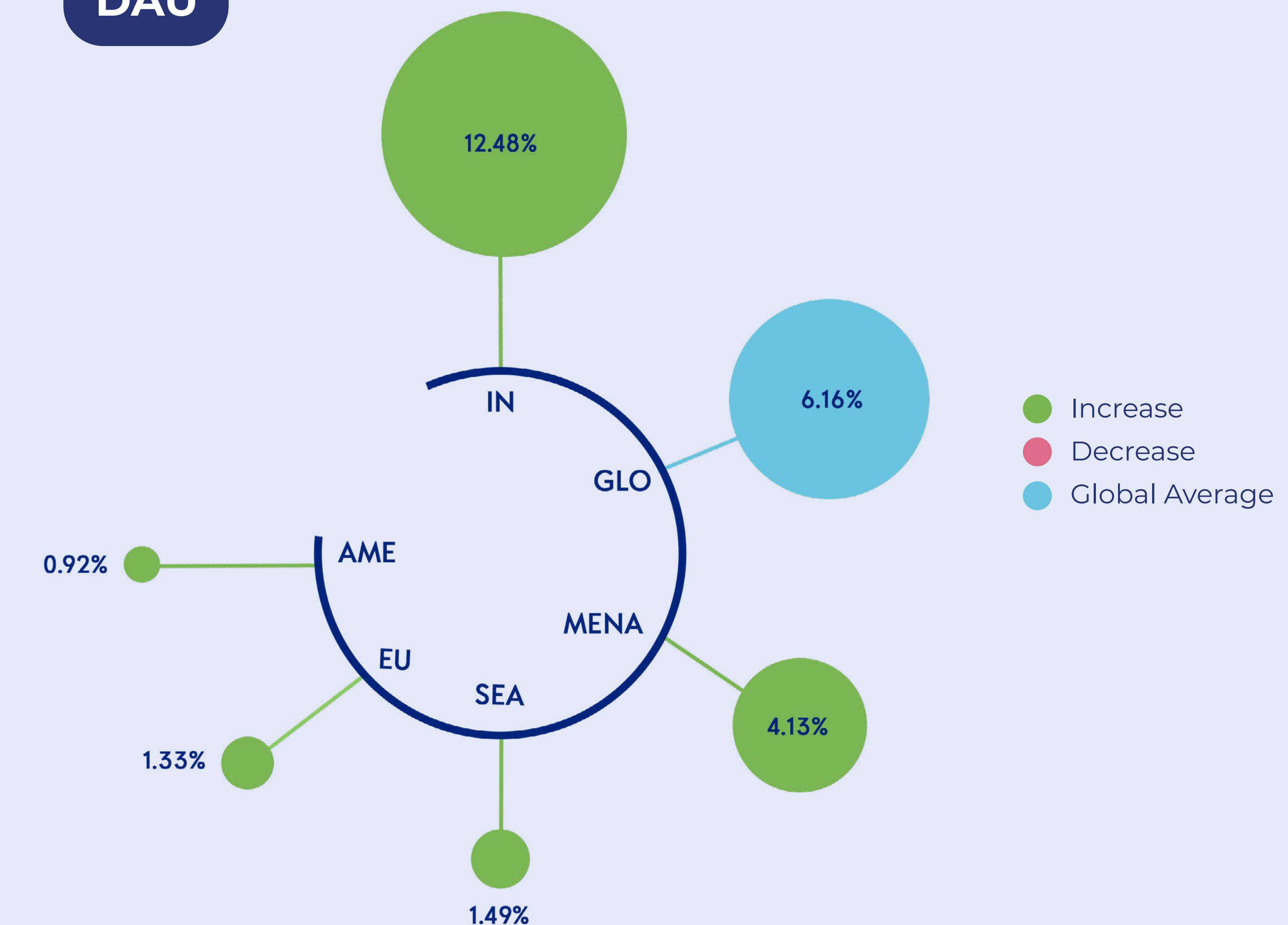
Global Movements (Q2 vs Q1)

Downloads



SEA	(0.31%)
EU	(3.96%)
MENA	(7.71%)
AME	(3.59%)
ROTW	(19.67%)
IN	(15.48%)
Global	(8.61%)

DAU



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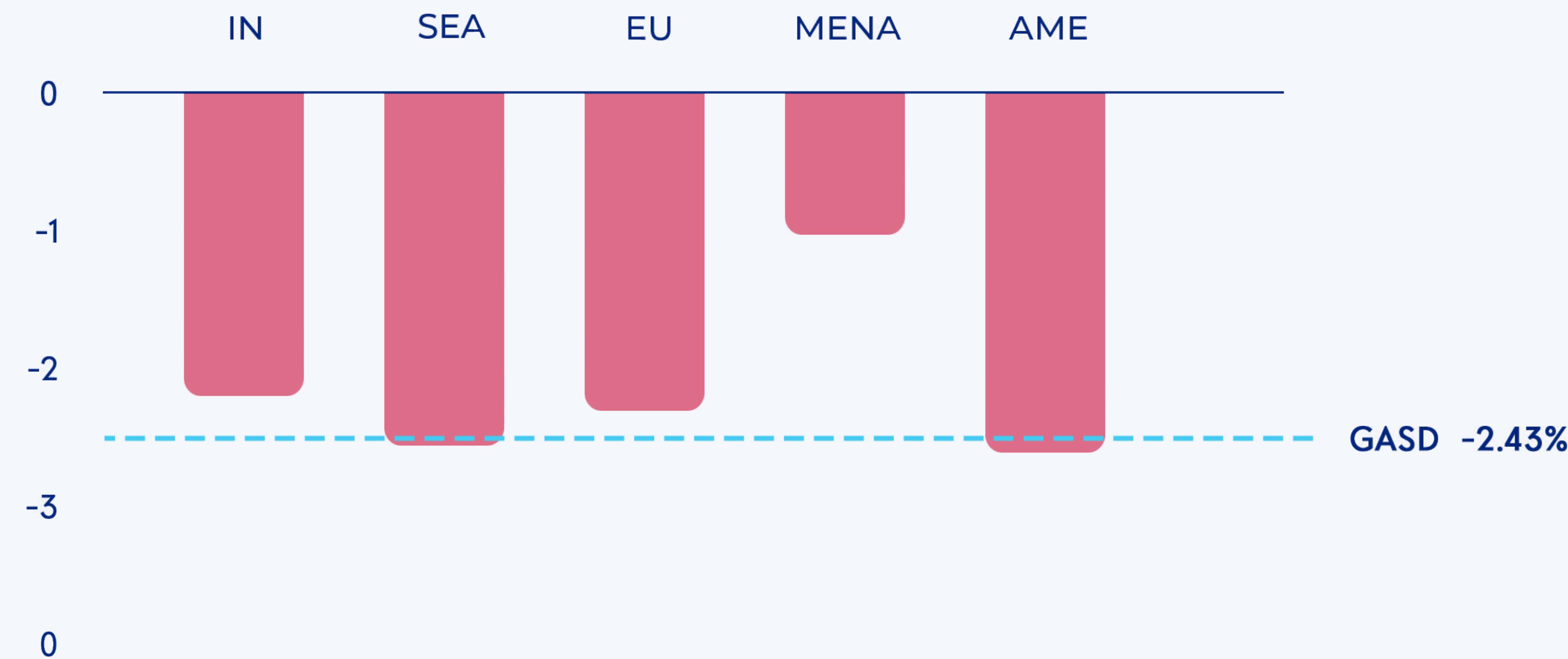
- Gaming apps have seen the largest growth in India. The number of new users, active users and frequency of usage increased much more than the global average.
- The number of downloads in Southeast Asia has seen a slight increase of 0.32%, smallest growth among all the regions.

- After India, the Middle East and North Africa region has shown the highest increase in new and active users. In fact, the frequency of usage of gaming apps was also higher than the global average.
- The Americas have seen the lowest increase in DAU (0.92%).

Gaming

Global Movements (Q2 vs Q1)

Session Duration



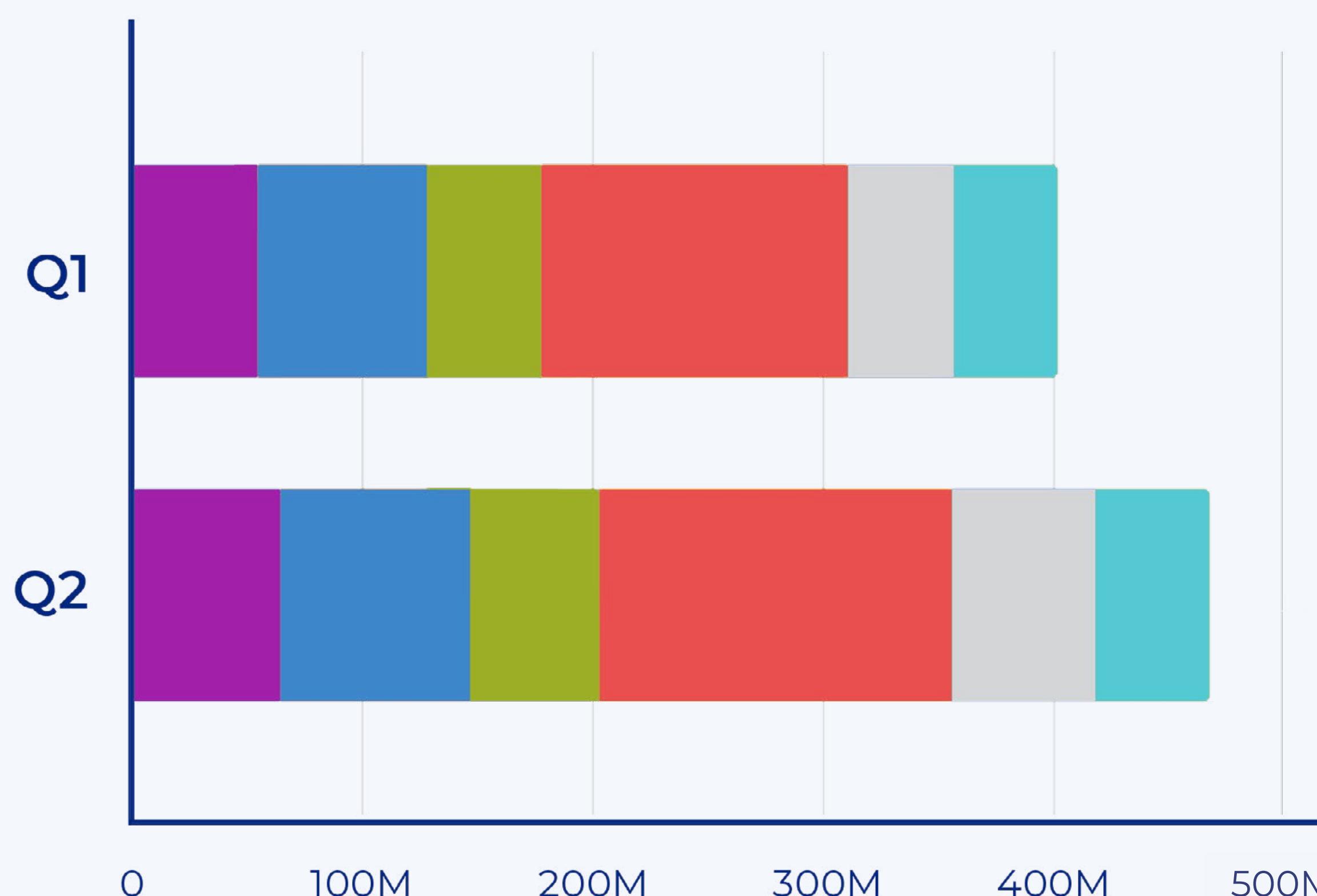
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- The average session duration has reduced consistently across all regions (2.43% globally), with the Americas seeing the largest fall in the average session duration (2.55%).

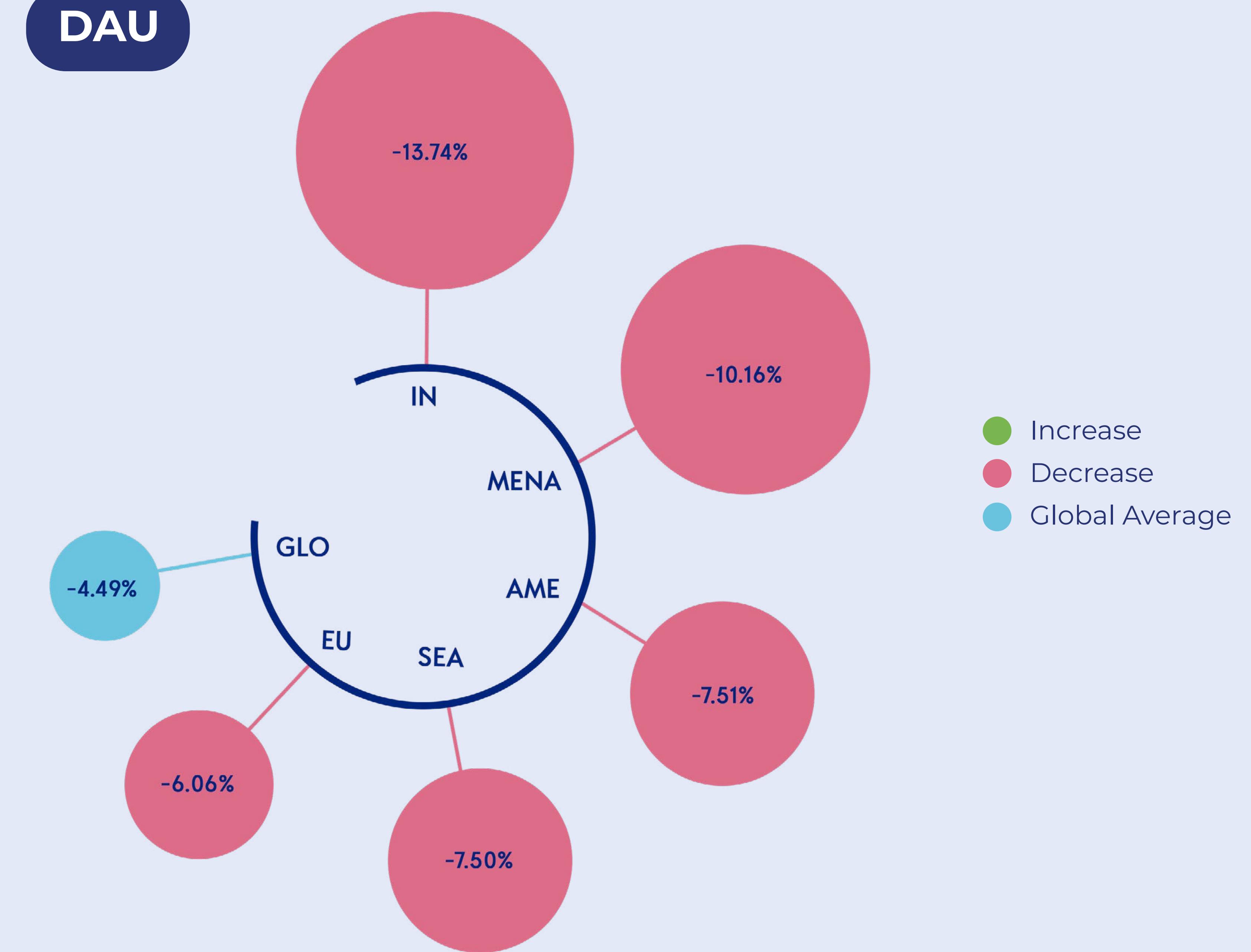
Sports

Global Movements (Q2 vs Q1)

Downloads



DAU



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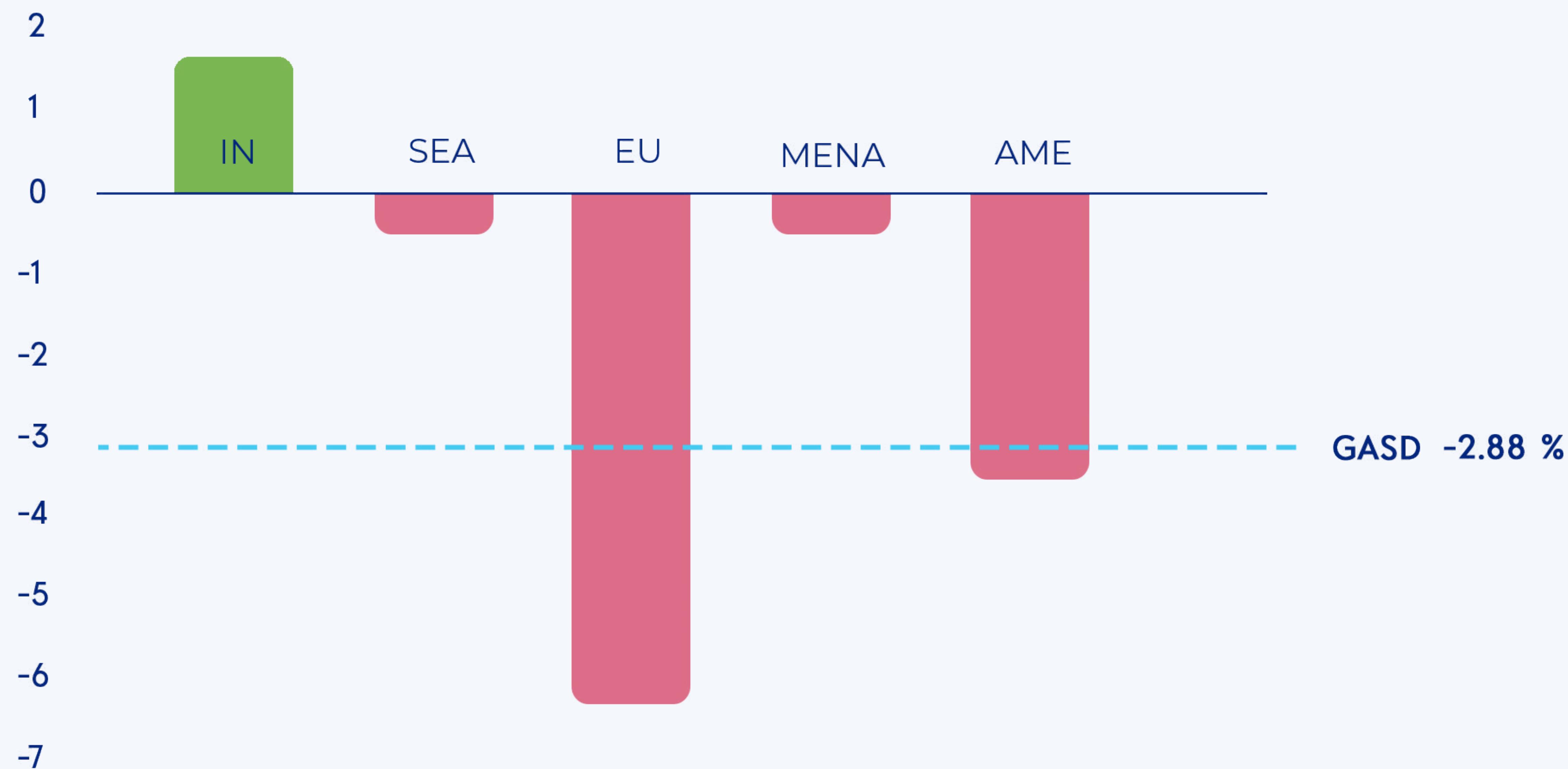
- The Sports category consists of sports-related news and live streaming apps. It also includes official apps of clubs, teams, and tournaments for different sports.
- Countries in Southeast Asia and Oceania were responsible for driving the most number of new users (16.31%), closely followed by Middle East and North Africa (14.82%) and the Americas (14.06%).

- While the number of new users for sports-related apps has consistently increased across all regions, the number of active users has decreased globally.
- India has seen the highest decline in the number of active users (-13.74%), more than 3X the global average.

Sports

Global Movements (Q2 vs Q1)

Session Duration



SEA : Southeast Asia + Oceania EU : Europe MENA : Middle East and North Africa AME : Americas IN : India GASD : Global Average Session Duration

- Although the frequency of usage has dropped slightly in India, the average session duration has increased. India was the only region that saw an increase in the average session duration (1.67%).
- Countries in Europe have seen the steepest drop in the average session duration (6.22%).

ABOUT MOENGAGE

MoEngage is an intelligent customer engagement platform, built for the user-obsessed marketer.

With AI-powered customer journey orchestration, personalization capabilities, and in-built analytics, MoEngage enables hyper- personalization at scale across mobile, email, web, SMS and messaging channels.

To learn more about omnichannel customer engagement with MoEngage, visit our website:

www.moengage.com



ABOUT APPTOPIA

Apptopia provides competitive intelligence for the mobile app economy.

Apptopia was founded on the belief that the mobile app community requires transparency to level the playing field and make way for innovation and industry advancements.

To learn more about mobile intelligence with Apptopia, visit our website:

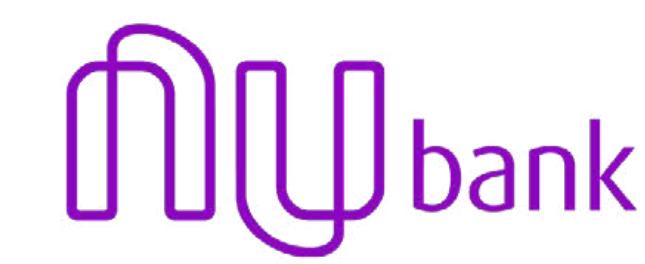
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Discover new growth paths and engagement strategies during crises for 2020

Additional resources

[20 Engagement Strategies During Crisis From Global Marketers](#)

[Coronavirus Business Impact:](#)
Data driven strategies for brands (Q1, 2020)

[The complete Growth Strategy Handbook](#)
A guide to building up people, processes, and technology for your business

[Marketing in a recession:](#)
How can mobile brands navigate during a crisis (2020)