
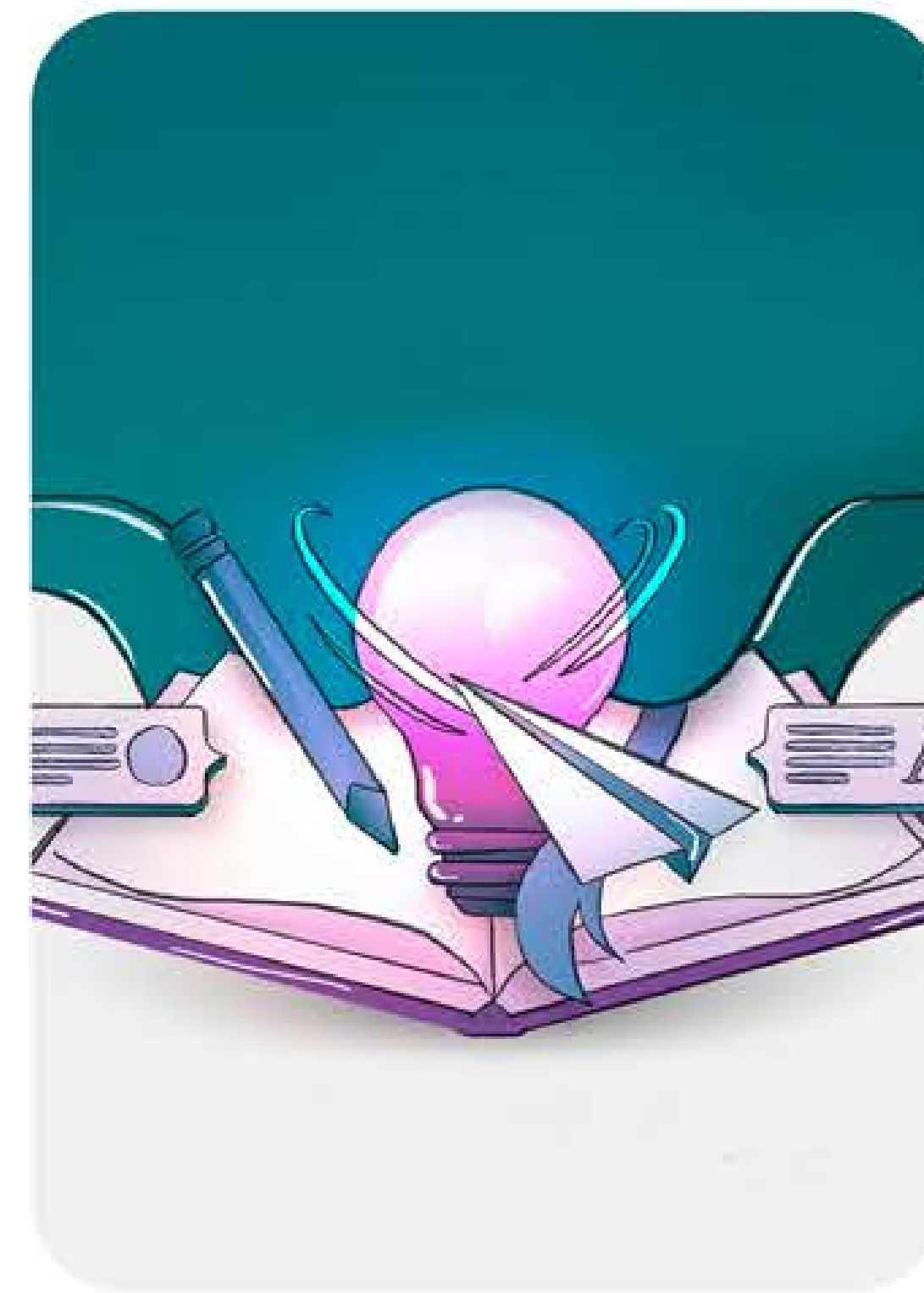
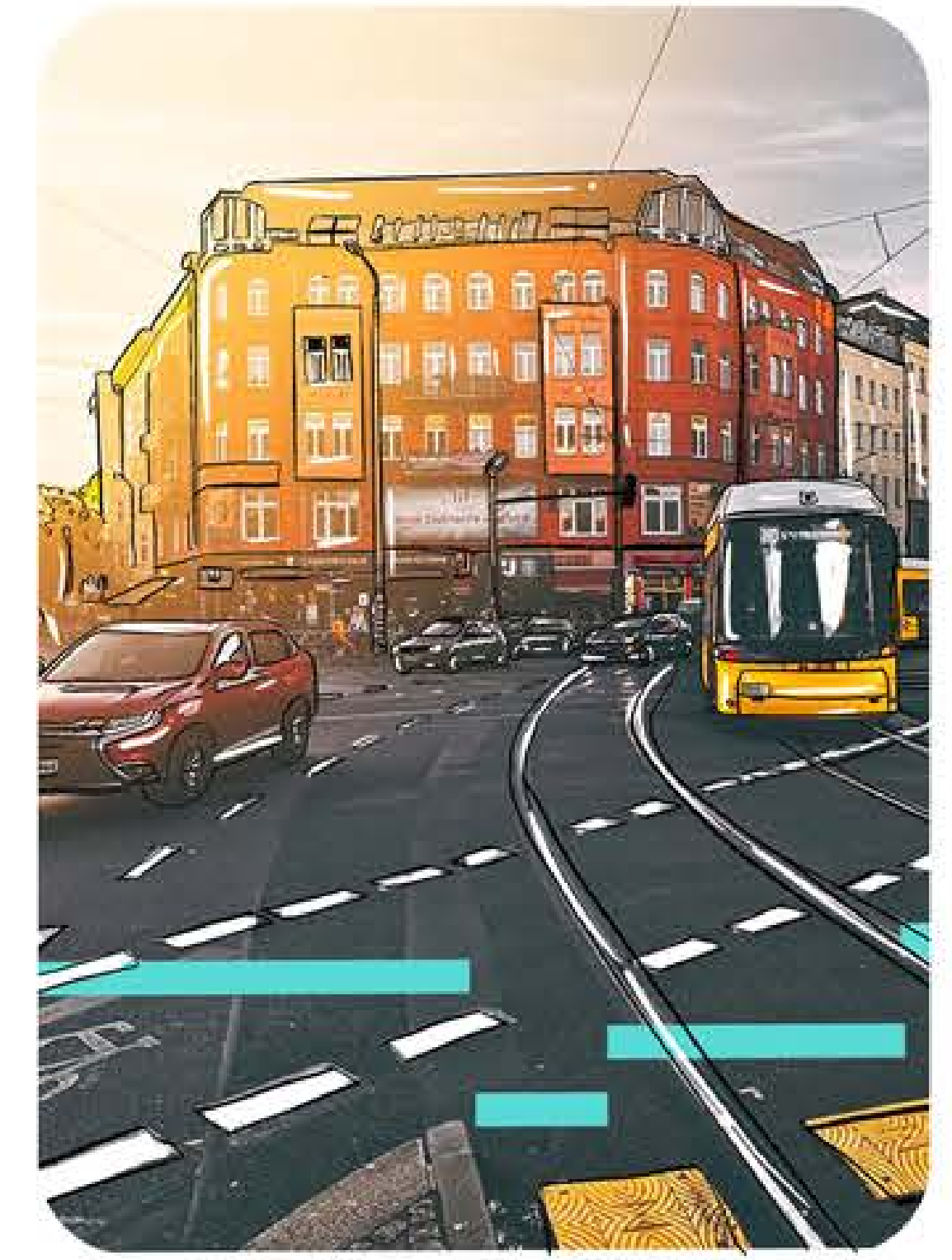


CORONAVIRUS BUSINESS IMPACT








Data-driven insights for
brands during COVID-19






moengage |  apptopia



CORONAVIRUS BUSINESS IMPACT

DATA-DRIVEN INSIGHTS FOR BRANDS DURING COVID-19

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INTRODUCTION

The COVID-19 pandemic has had far reaching humanitarian consequences. At the time of writing this report, a total of 1,020,993 confirmed cases and 53,457 deaths had been reported from all over the world. In order to prevent the virus from spreading, governments have been forced to impose travel restrictions, quarantines, curfews, workplace hazard controls, event postponements and cancellations and even complete closures of facilities.

As businesses around the world come to terms with yet another economic depression termed as the Coronavirus recession, these words hold water now more than ever:

“The green reed which bends in the wind is stronger than the mighty oak which breaks in a storm.”

- Confucius

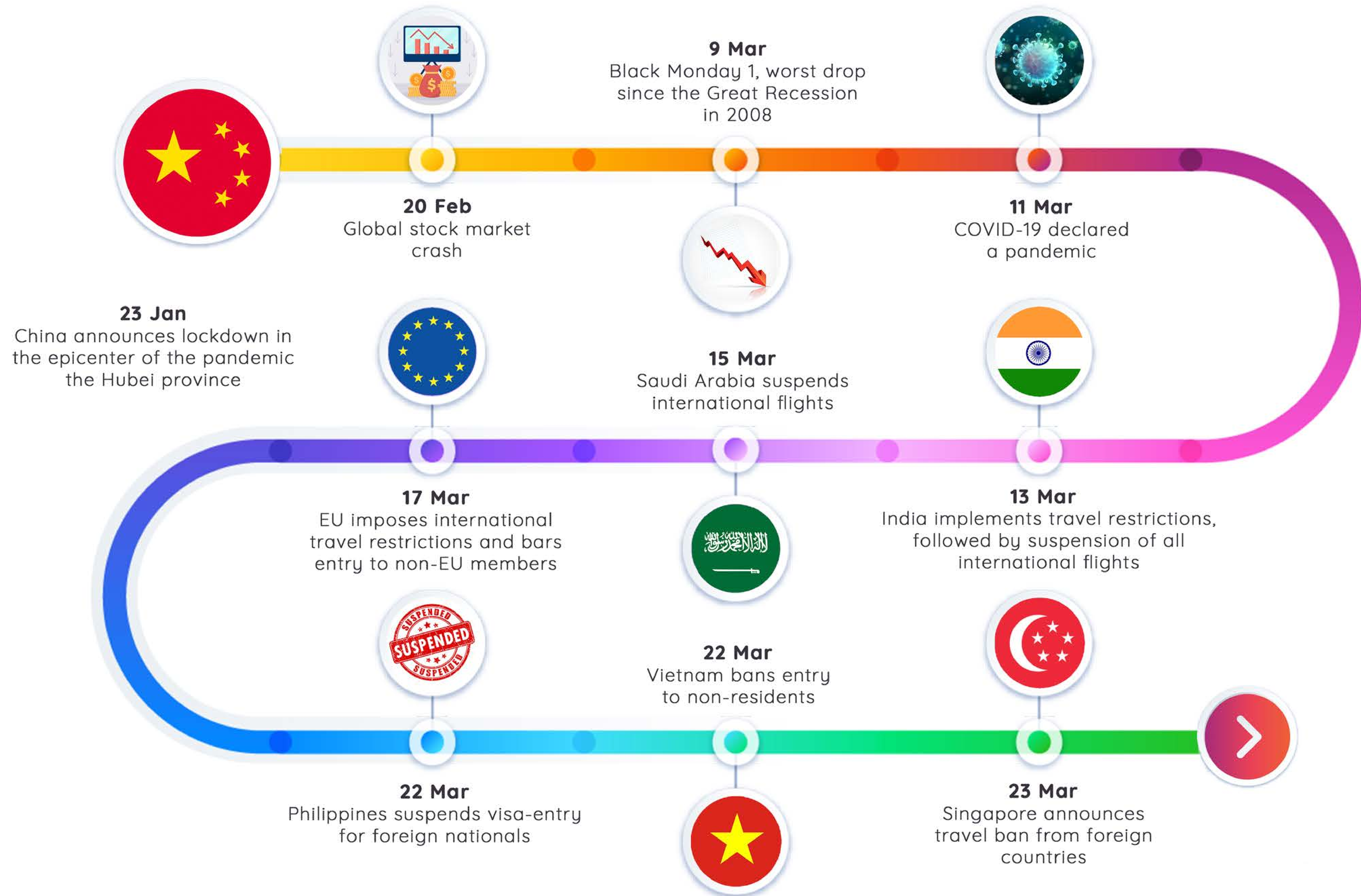
Businesses worldwide are learning how to deal with this ‘Black Swan’ event and trying to connect to their customers and even realign their strategies. In such times, it is important to reflect and understand that it is not the strongest who withstand the storm but the ones who can think on their feet in a rapidly changing world.

The one thing that comes to the aid of businesses and governments alike is hard-hitting, in-depth data. Data that uncovers facts, blows the dust off our intuitions and distinguishes the impactful from the noise.

With a vision to bring such information to the fore, we set out analyzing data trends of more than 1.5 billion users worldwide, across 12 different industry verticals. We found that while Retail, Real-Estate, and Travel & Hospitality industries have struggled, industries such as Media & Entertainment, Video Conferencing and Social Media have prospered.

This report contains data primarily from North America, India, the Middle East and Southeast Asia. We hope you can leverage this data to design strategies that add value to both you and your customers.

HISTORY OF COVID-19





TRAVEL & HOSPITALITY

NORTH AMERICA

Downloads -12.05%
DAU -1.85%

MIDDLE EAST

Downloads -34.95%
DAU -11.65%

INDIA

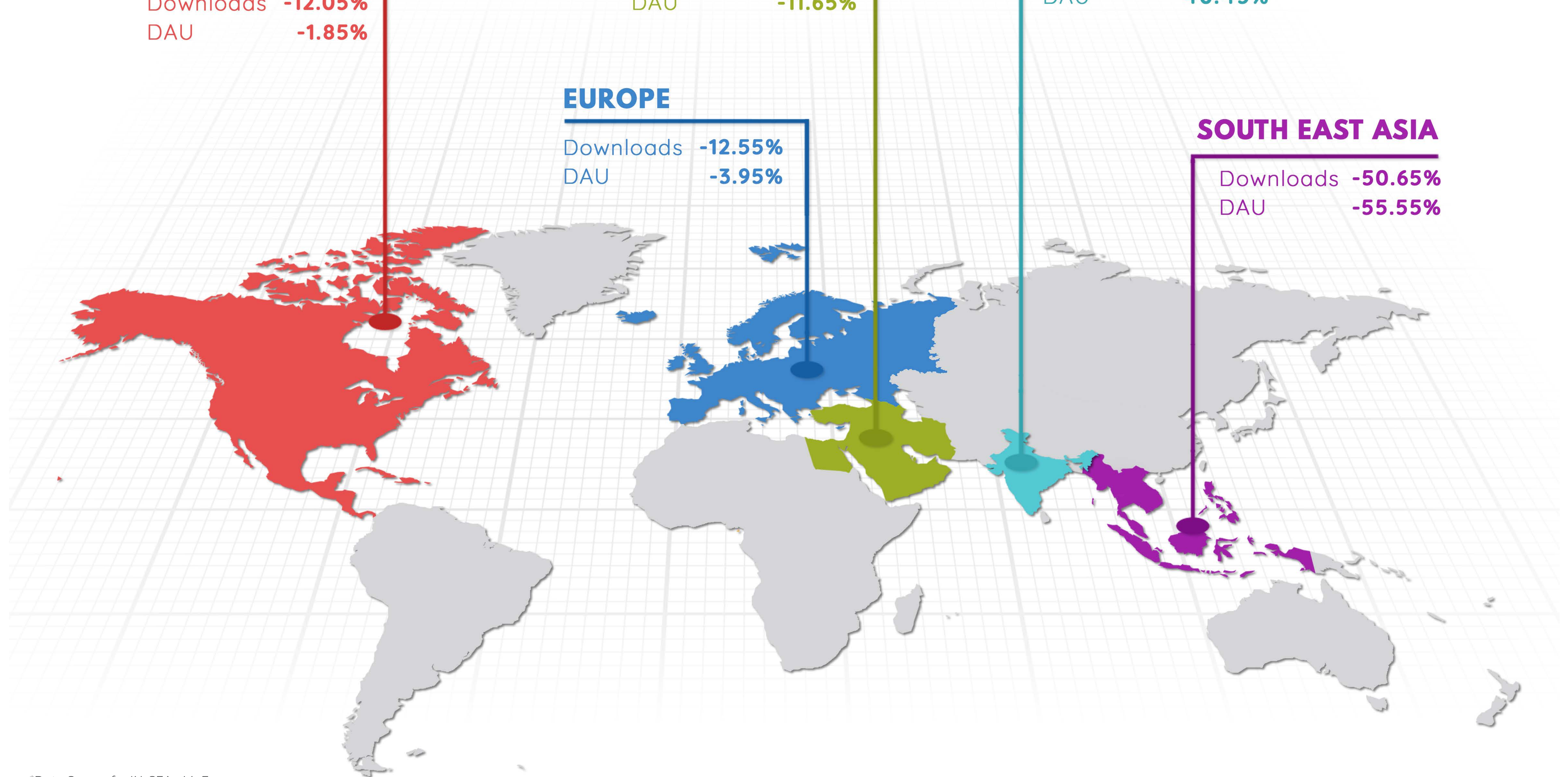
Downloads -90.60%
DAU -40.45%

EUROPE

Downloads -12.55%
DAU -3.95%

SOUTH EAST ASIA

Downloads -50.65%
DAU -55.55%



*Data Source for IN, SEA - MoEngage
*Data Source for NA, EU, MEA - Apptopia

Data collected for March 2020



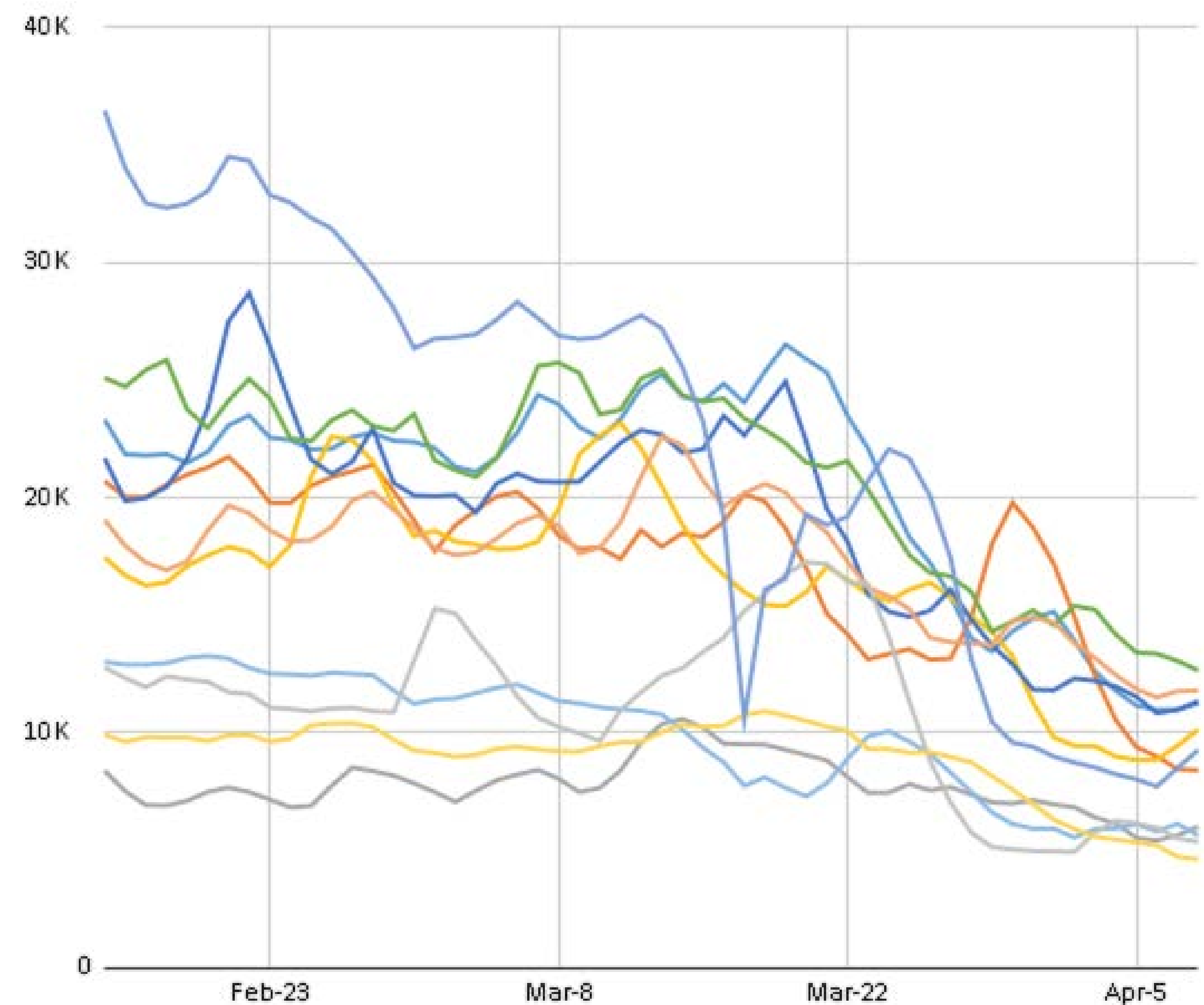
WORLDWIDE TRENDS IN AIRLINES

The most visible drop in downloads, daily active users(DAU) is for airline apps with heavy operations in the EU. **Ryan Air takes the biggest hit (50% drop between March 11 and March 16)**, closely followed by easyJet and Wizz Air.

Downloads for airlines based in the United States are not affected in February - the trend is uniform through the month. The downward trend begins around the first week of March.

Emirates app, whose user base is predominantly in the UK, United States, and China, doesn't show a downward trend till as late as March 23, after which the **downloads drop by close to 60%.**

Although we don't have the exact in-app purchase data, the trend in the advertising dollars spent by the companies paints a grim picture of the industry. Most brands have cut down on advertising by as much as 60% in March compared to late February.



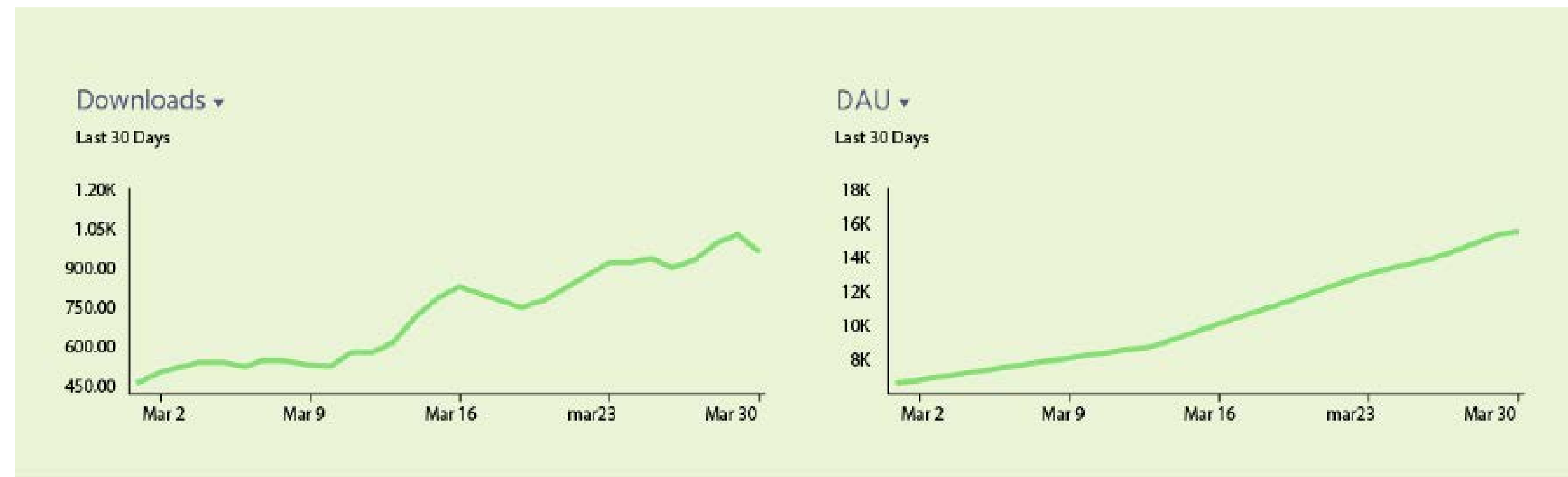
- United Airlines (App)
- easyJet: Travel App (App)
- JetBlue - Book & manage trips (App)
- AirAsia (App)
- Southwest Airlines (App)
- Wizz Air (App)
- Fly Delta (App)
- Emirates (App)
- British Airways (App)
- Ryanair (App)

App download trends for top 10 airlines by traffic volumes worldwide

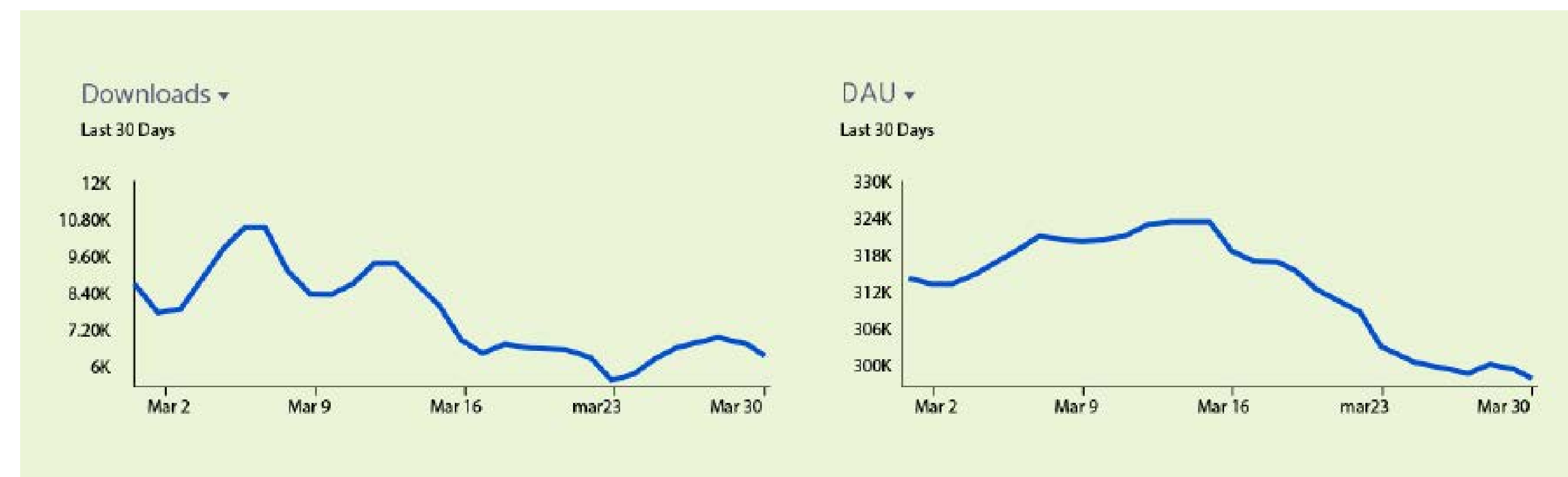
DID YOU KNOW?

The top two logistics providers in the world, FedEx and DHL, are fighting a trend similar to that of airline apps. Interestingly, the DAU for both FedEx and DHL apps (+55%, +47% respectively) in China, the epicentre of COVID-19, is almost the inverse of what we see for the rest of the world. **There is a consistent rise in DAU and downloads for both the apps in the last 90 days.**

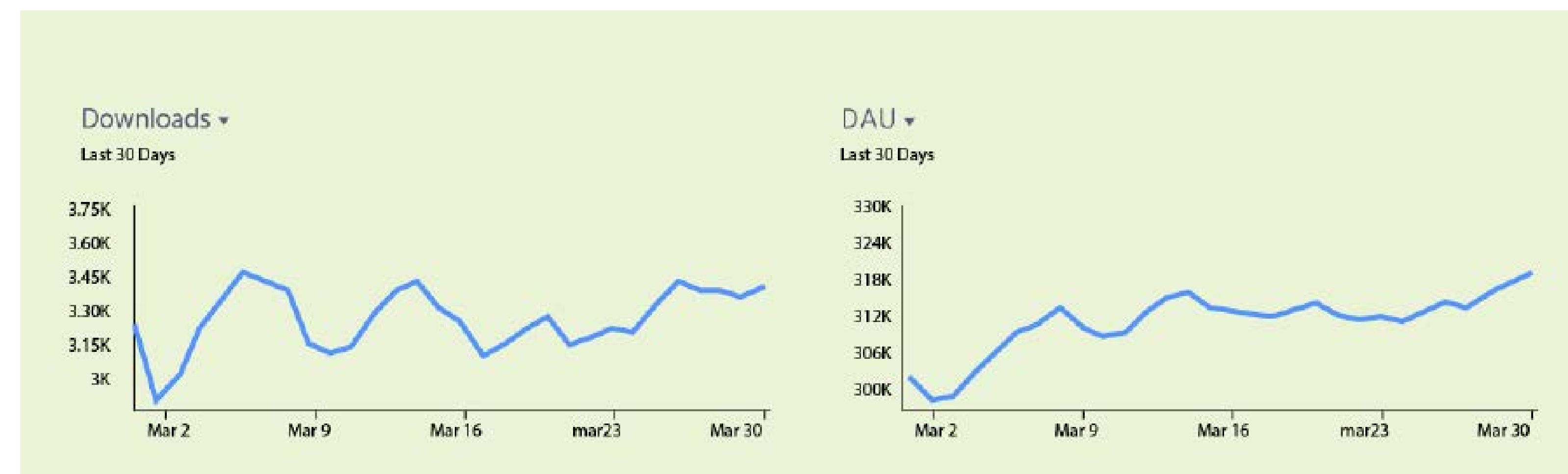
WORLDWIDE TRENDS IN HOTEL INDUSTRY



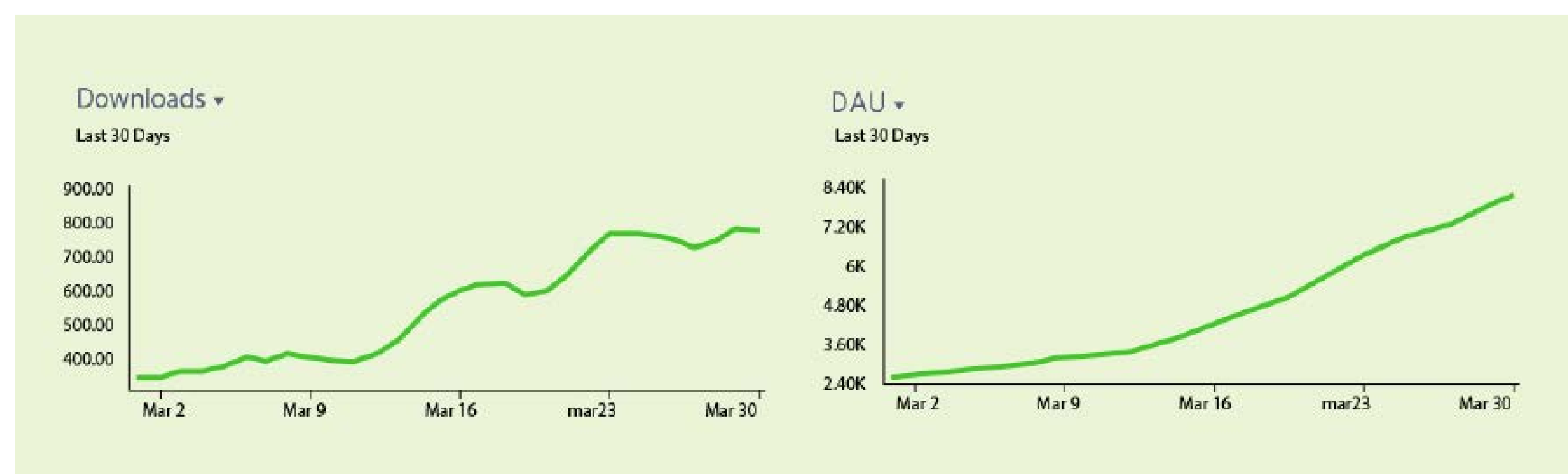
App downloads and DAU for FedEx in China



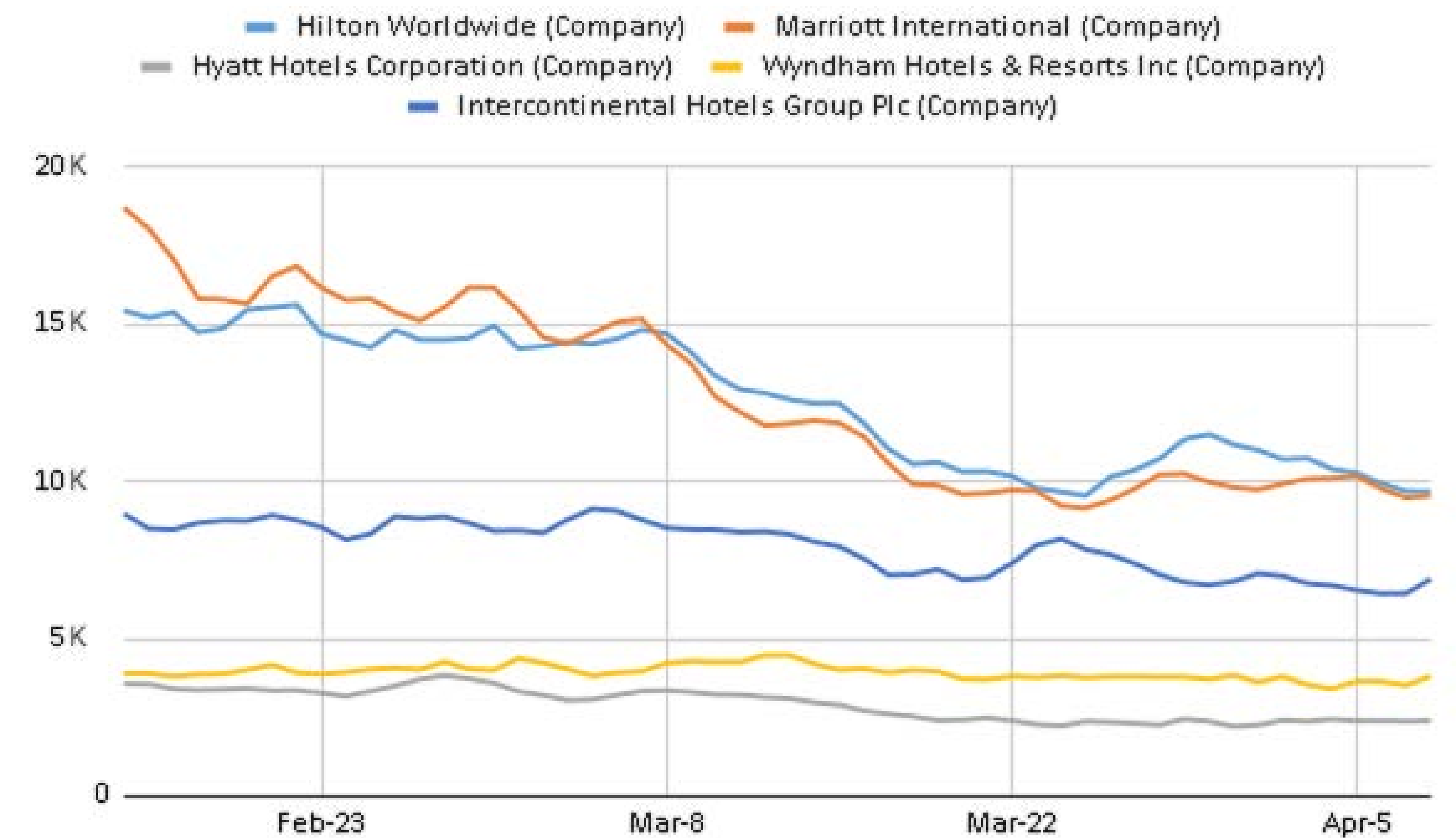
App downloads and DAU for FedEx worldwide



App downloads and DAU for DHL worldwide

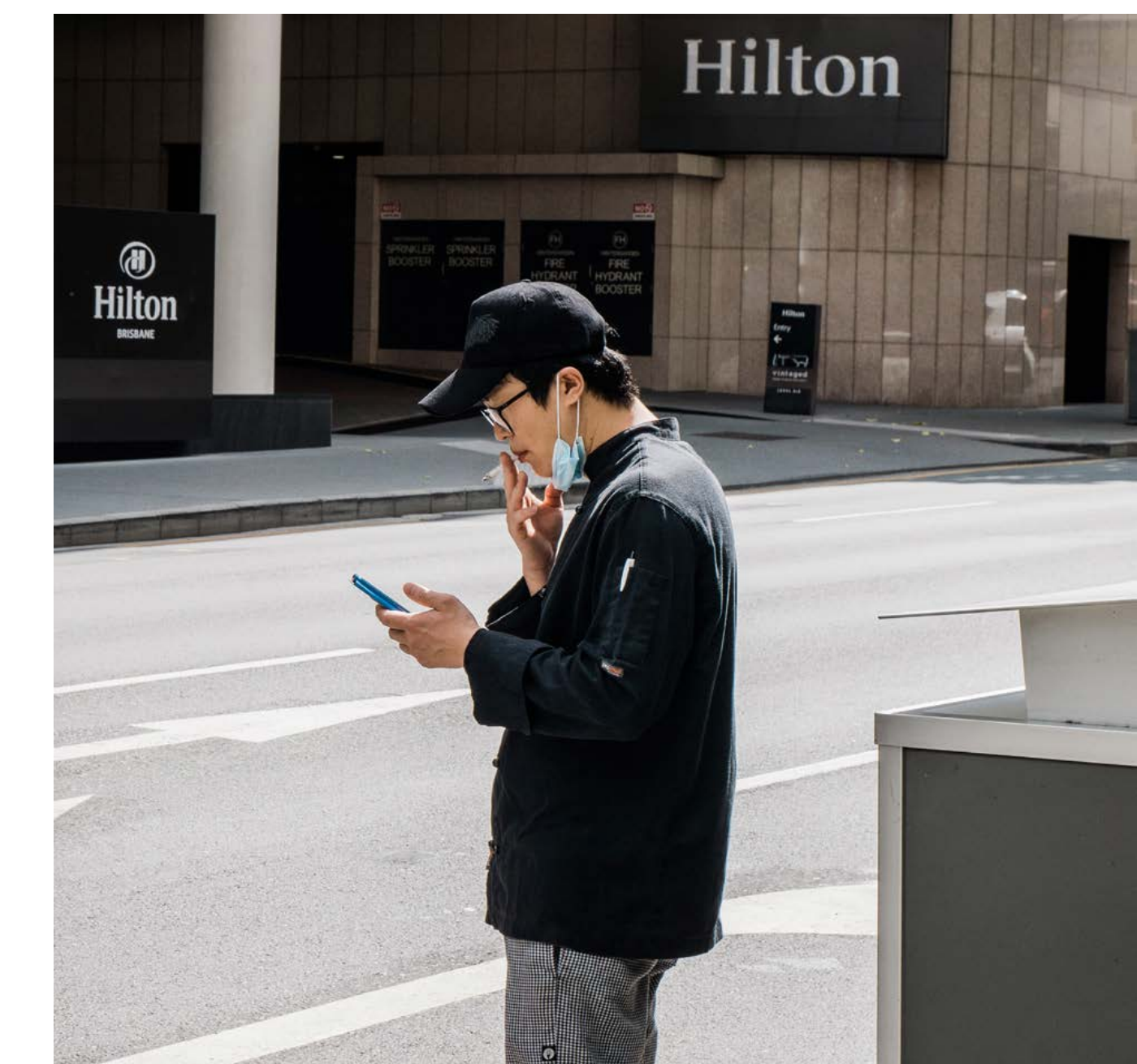


App downloads and DAU for DHL in China



App download trends for top 5 international hotel chains worldwide

- All major hotel chains show a downward slump, from as early as February 15.
- **Marriott (30% drop** in downloads in the last 30 days), **Hilton (17% drop** in downloads in the last 30 days), and **Hyatt (19% drop** in downloads in the last 30 days) show early decline owing to wider international presence.
- Intercontinental (10% drop in downloads in the last 30 days) and Wyndham start declining later, around mid-March



DID YOU KNOW?

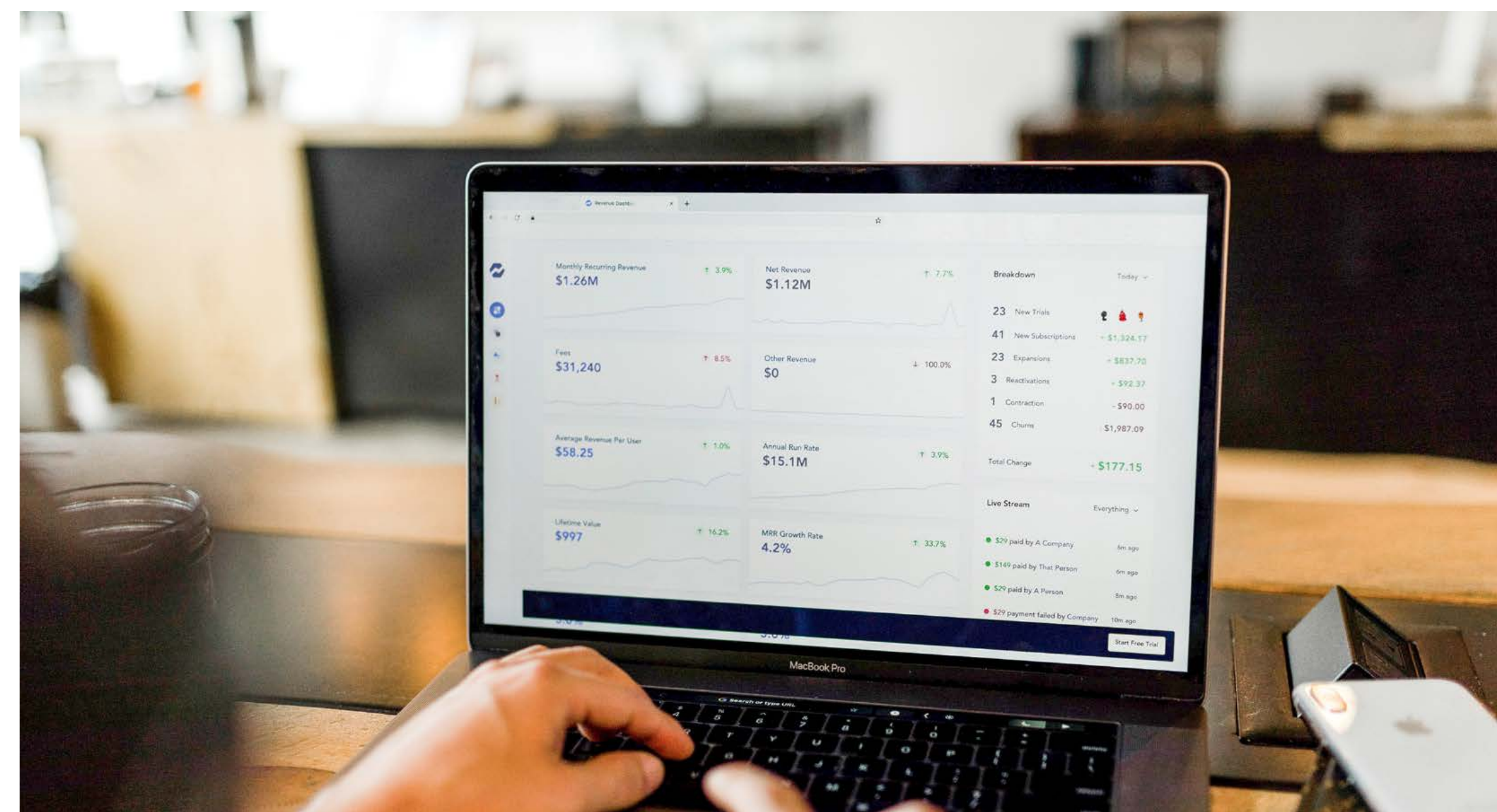
China serves as Marriott International's second biggest geography in terms of DAU, after the United States. **The hotel chain sees a decline in DAU in China as early as mid-January.**

WORLDWIDE TRENDS IN TOP 45 OTAS



Download trends for top 45 global Online Travel Aggregator apps

- Decline (37%) in DAU around last week of February, which magnifies in mid-March to 50%.
- Trend to continue in the weeks to come owing to work from home and social distancing policies implemented by governments worldwide.

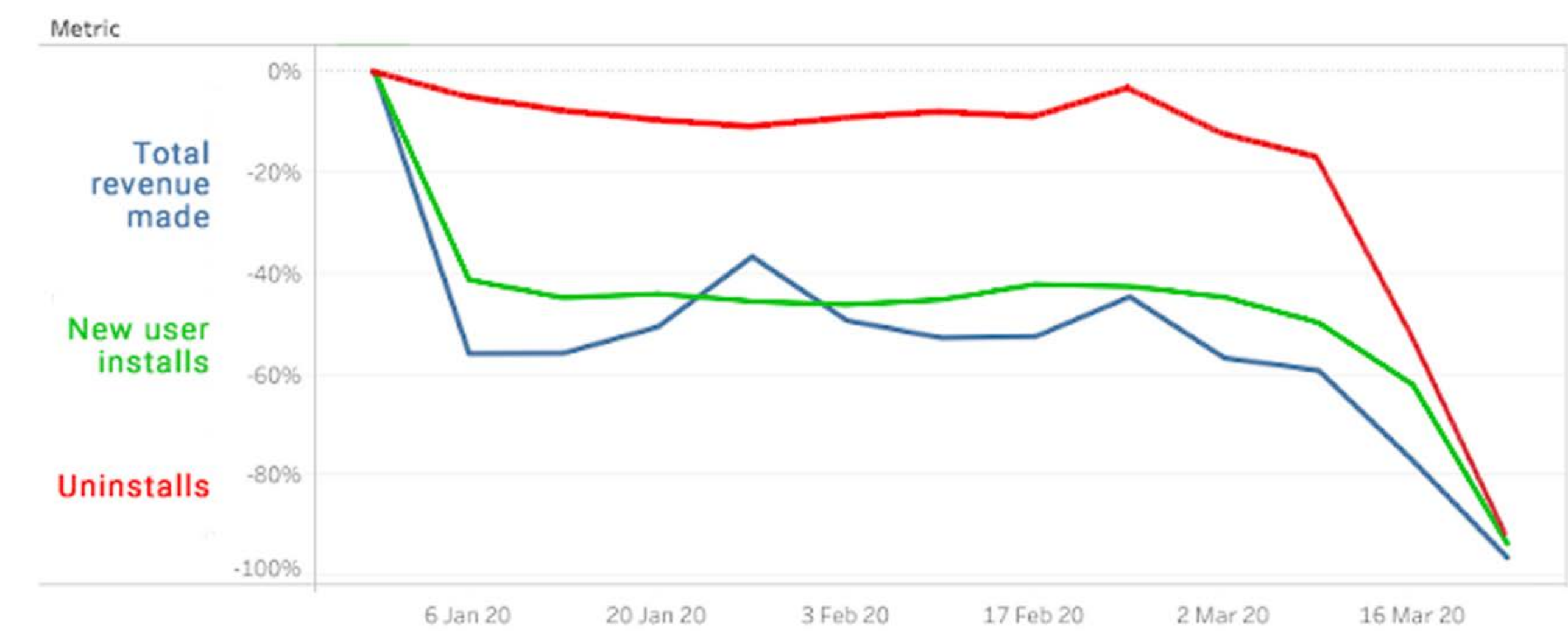


DID YOU KNOW?

Following this downward trend, on March 30, **Airbnb** announced a complete halt on marketing spends and hiring, to control losses caused by COVID-19.

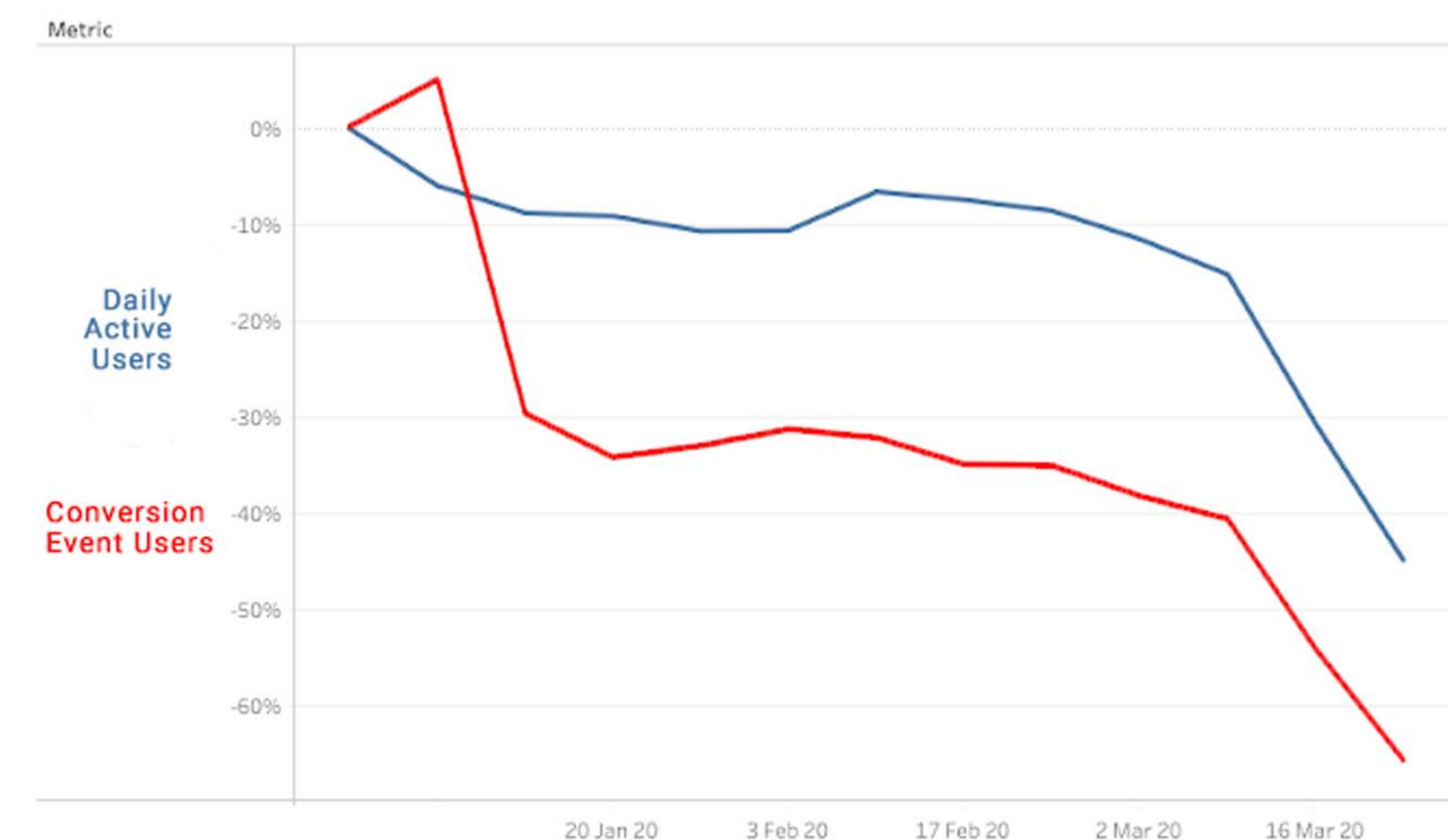
INDIA

Metric Trends Weekly - Sum



Total revenue made, new user installs, and uninstalls of travel & hospitality apps in India

Metric Trends Weekly - Avg



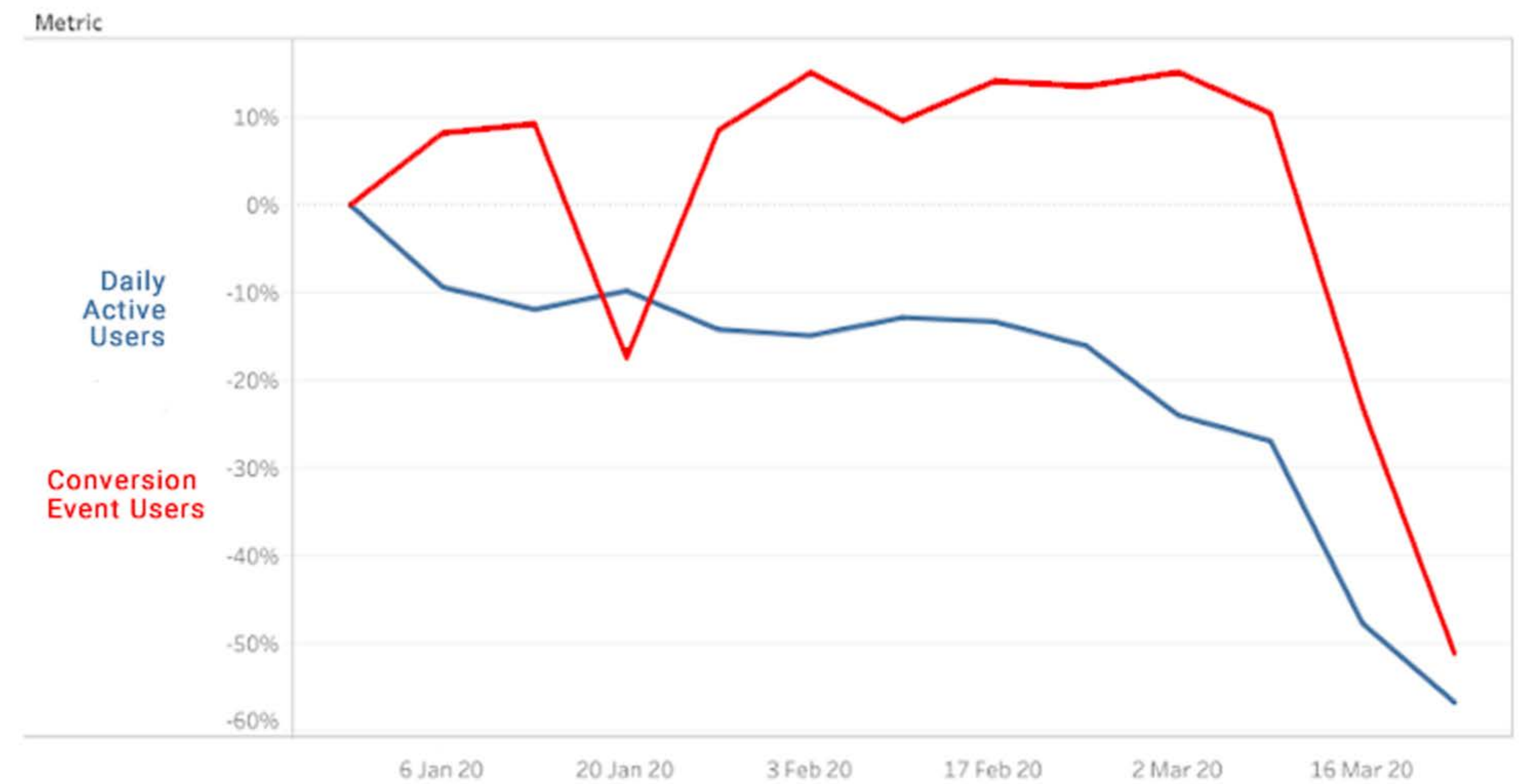
DAU and purchase activities made within travel apps in India

OBSERVATIONS

- Travel and hospitality sector shows a steep drop in DAU, conversions and revenue after new year holidays in the first week of January. It then maintains uniform traffic throughout February, before dropping further starting the first week of March.

- Early signs of drop show up in the week of February 23 - March 1. This intensifies after March 8.
- **The numbers for DAU, MAU and subscribed users all show a similar downward trend in the week starting March 3 and fall to the lowest around March 10.**
- The week of March 8 - March 15 coincided with Holi, the festival of colors and a holiday in India which typically sees huge traffic. Surprisingly, the trend this year dipped, implying that people had already become aware of 'social distancing' and stayed away from travel to avoid last minute flight cancellations. Revenue showed a slight boost over the weekend but it was not sustained and quickly fizzled out.
- Work from home policies have clearly affected the industry, since work related travel is prohibited.

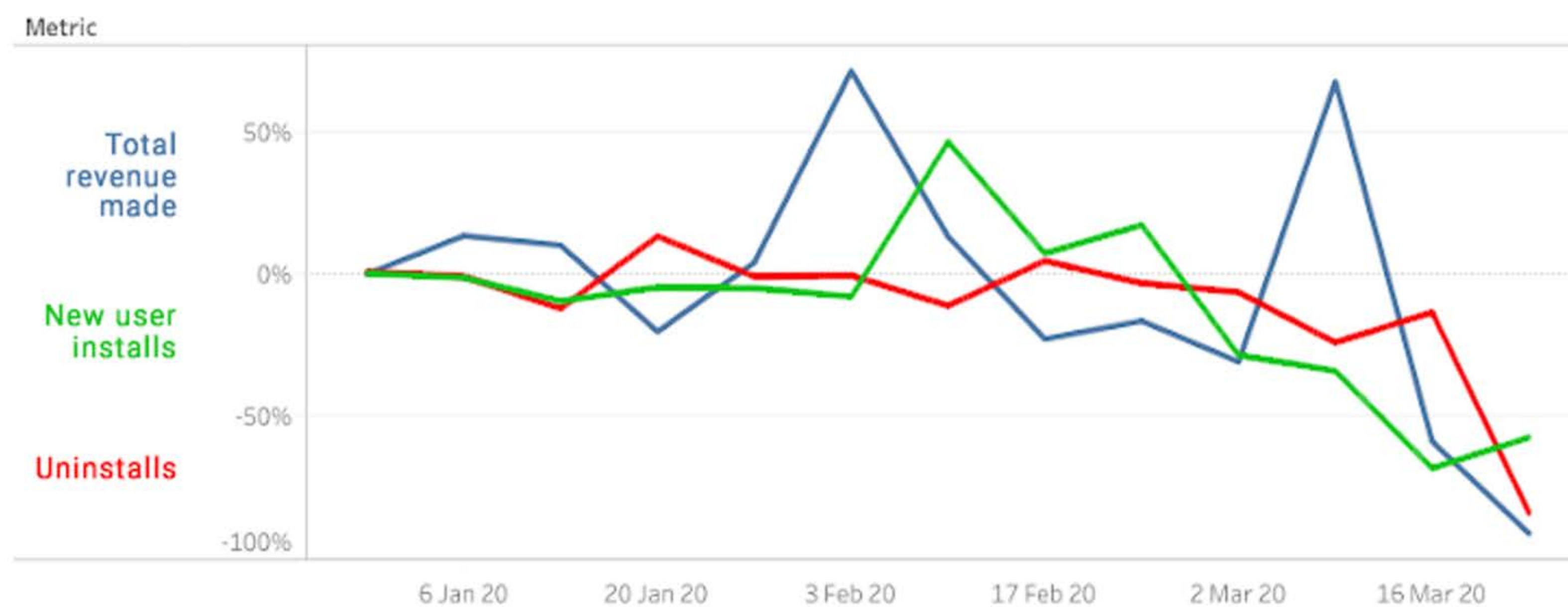
Metric Trends Weekly - Avg



DAU and purchase activities in travel & hospitality apps in Southeast Asia

SOUTHEAST ASIA

Metric Trends Weekly - Sum



Total revenue made, new user installs, and uninstalls of travel & hospitality apps in Southeast Asia



OBSERVATIONS

- Since COVID-19 had a two week headstart in Southeast Asia as compared to India, we see similar trends there but two weeks earlier. **DAU/MAU data starts dipping as early as February 16, and shows a clear downward trend around late February and early March.**
- Data for new users follows a similar trend and shows a distinct dip in total numbers around February 20.
- Surprisingly, the dip in DAU/MAU/new users does not affect total purchases in the industry till as late as March 8, after which it shows a steep fall.
- The week of March 8 actually shows an upward trend in revenue. This peculiar reversal in the otherwise downward trend is owing to discounts and offers rolled out by some of the biggest airlines in Southeast Asia during that period.

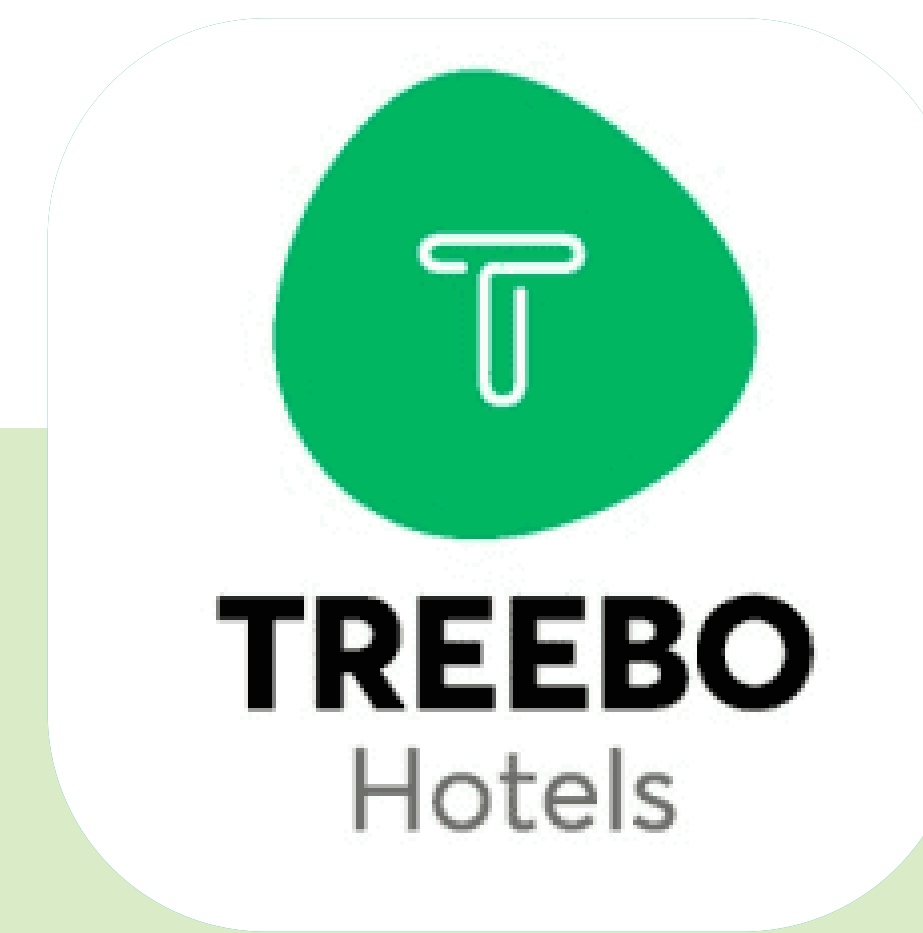
CUSTOMER STORIES



Yatra, one of India's leading online travel companies, ran two campaigns to spread awareness and correct information among travelers in the wake of the COVID-19 pandemic:

- The first campaign offered easy tips on how to travel safely and manage upcoming travel plans.
- The second campaign covered details of travel advisories issued by various governments and new rescheduling and cancellation policies announced by different airlines.

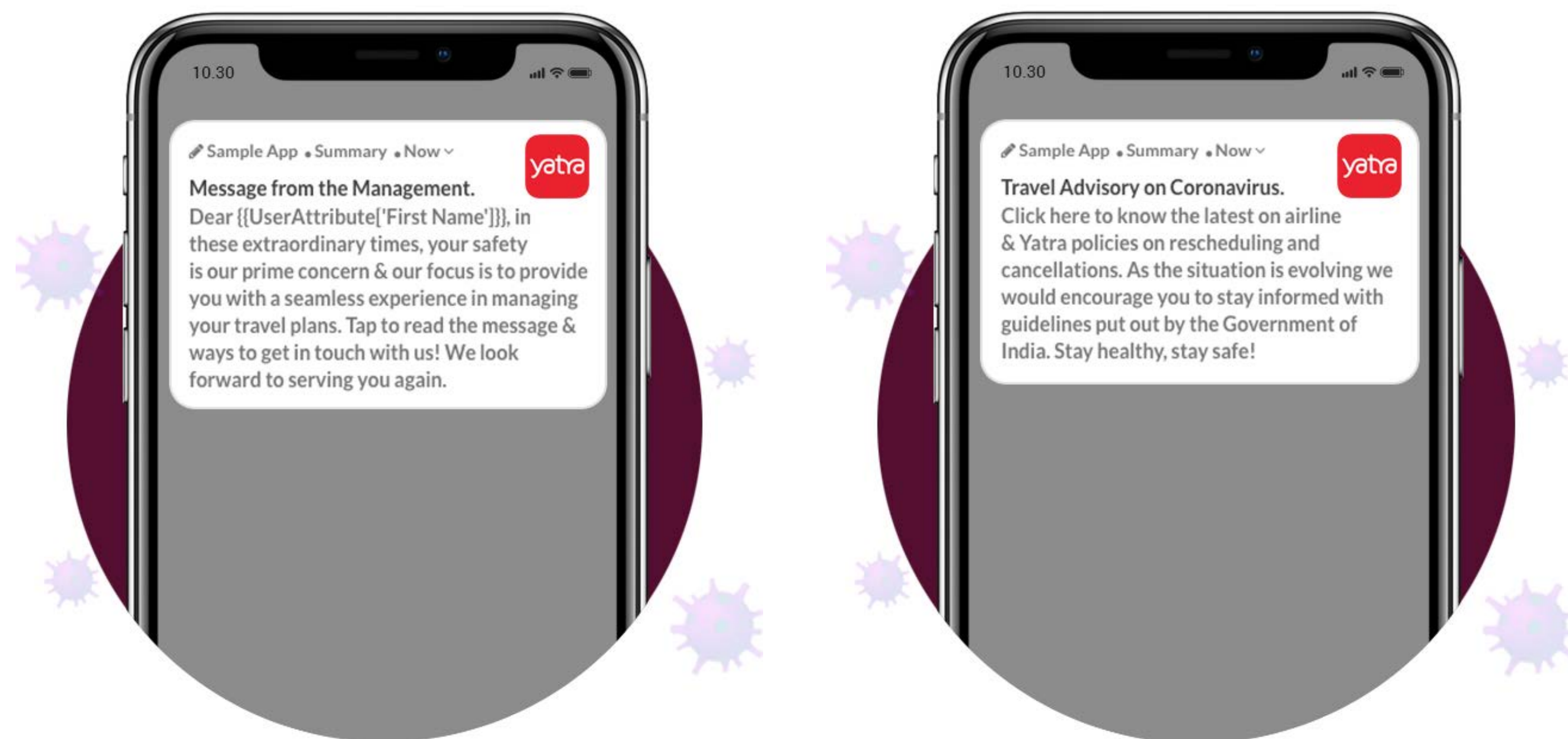
With these campaigns, Yatra reached out to more than 1.5 million users and was able to assist them in rescheduling or cancelling bookings without any hassle.



Treebo, a leading budget-hotel chain in India, has been running an email campaign called 'Preparedness against COVID-19'. Through this campaign, Treebo users receive detailed infographics on various safety measures

adopted by them. Treebo has been running this campaign for a week, targeting 100,000 users every day.

Apart from comprehensive cleaning of its properties and conducting regular health checks for staff, Treebo is also offering 100% free cancellation and faster refunds.





ONLINE SHOPPING

NORTH AMERICA

Downloads **13.00%**
 DAU **90.00%**

MIDDLE EAST

Downloads **-18.40%**
 DAU **3.00%**

INDIA

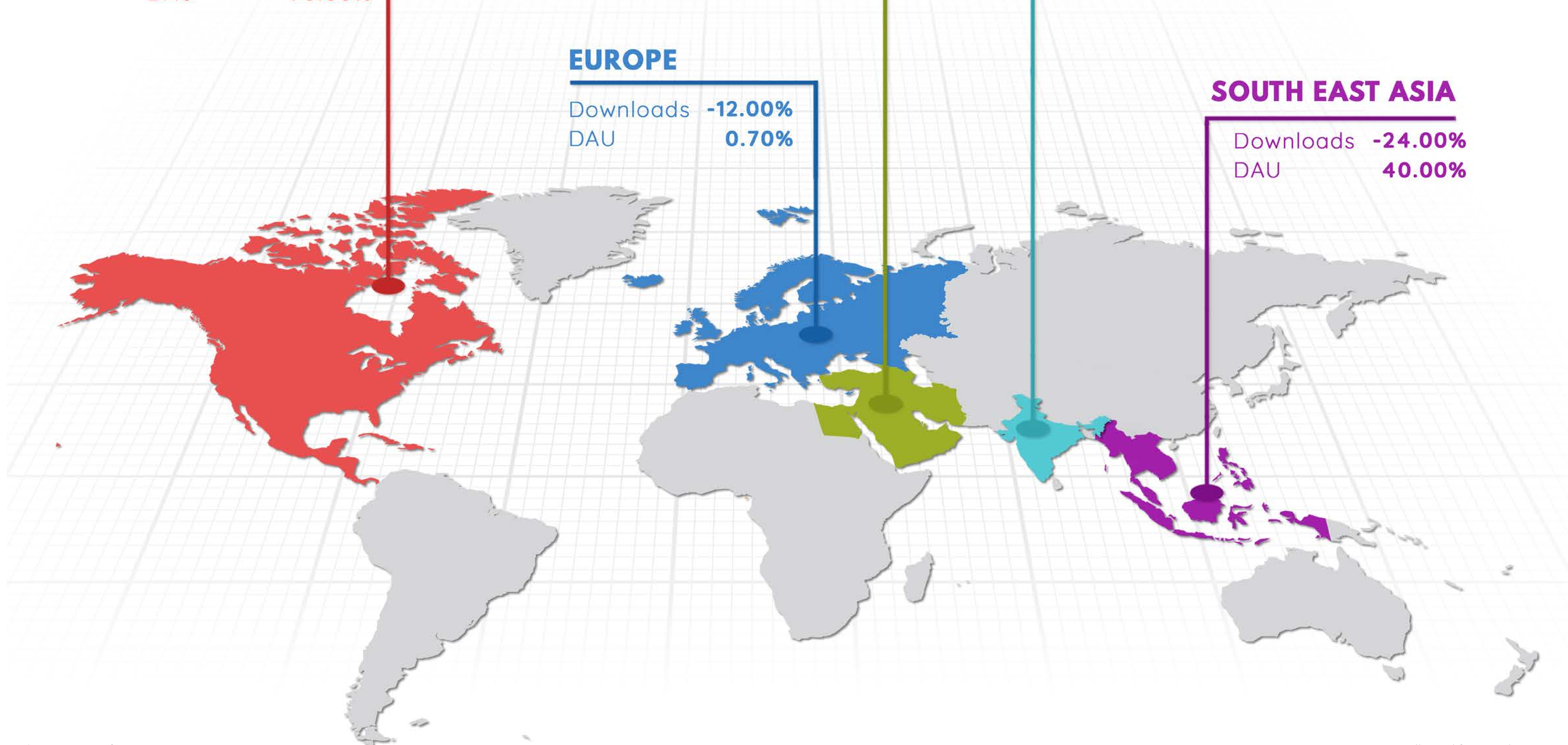
Downloads **118.00%**
 DAU **40.00%**

EUROPE

Downloads **-12.00%**
 DAU **0.70%**

SOUTH EAST ASIA

Downloads **-24.00%**
 DAU **40.00%**



*Data Source for IN, SEA - MoEngage
 *Data Source for NA, EU, MEA - Apptopia

Data collected for March 2020
 Sub-verticals – grocery delivery, essentials, and e-commerce

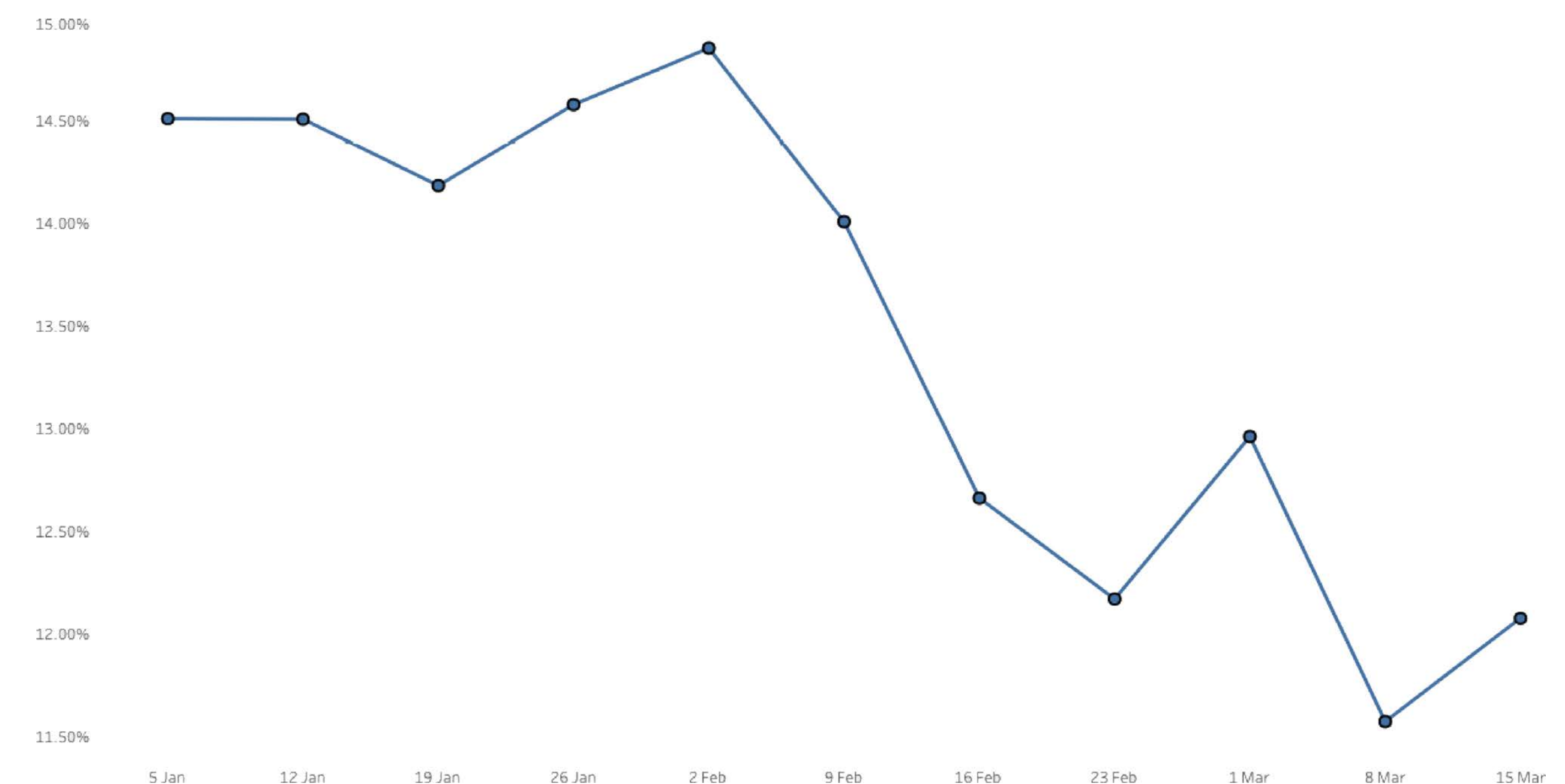


SOUTHEAST ASIA

OBSERVATIONS

Online shopping apps in Southeast Asia have seen a **sharp decline** in conversion rates since January 2020. This was when Malaysia, Singapore, South Korea, Thailand, and Hong Kong reported their first infections, and the numbers surged within days.

We believe it will take a few more weeks for the conversion numbers to stabilize in Southeast Asia since consumers are still understandably hesitant to purchase online.



Decrease in conversion rates from January 2020 to March 2020 in Southeast Asia

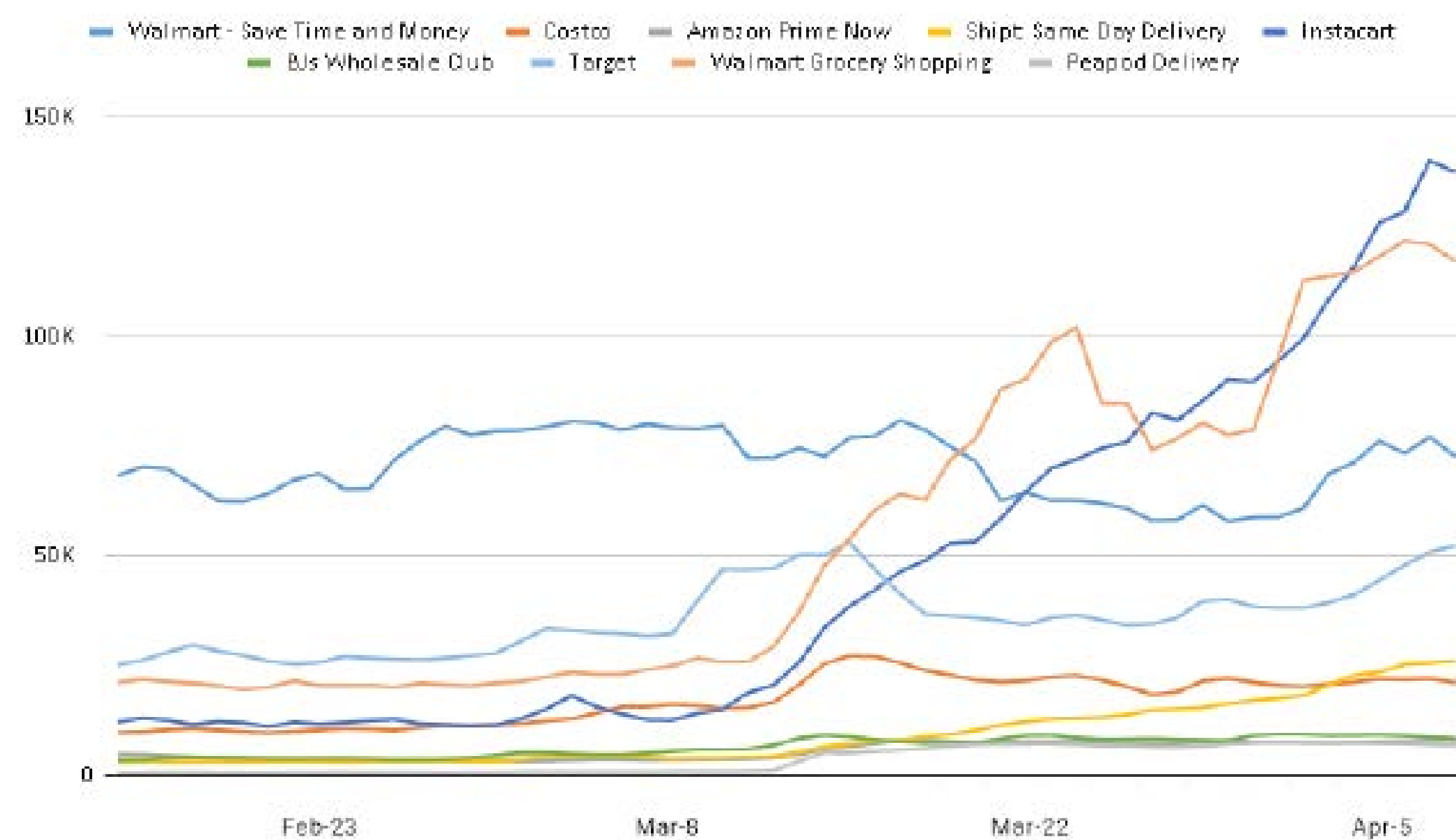
However, there is a **steady increase** in DAU February 2020 onwards. We predict this trend to continue in the coming months given that people will be spending more time indoors.

UNITED STATES

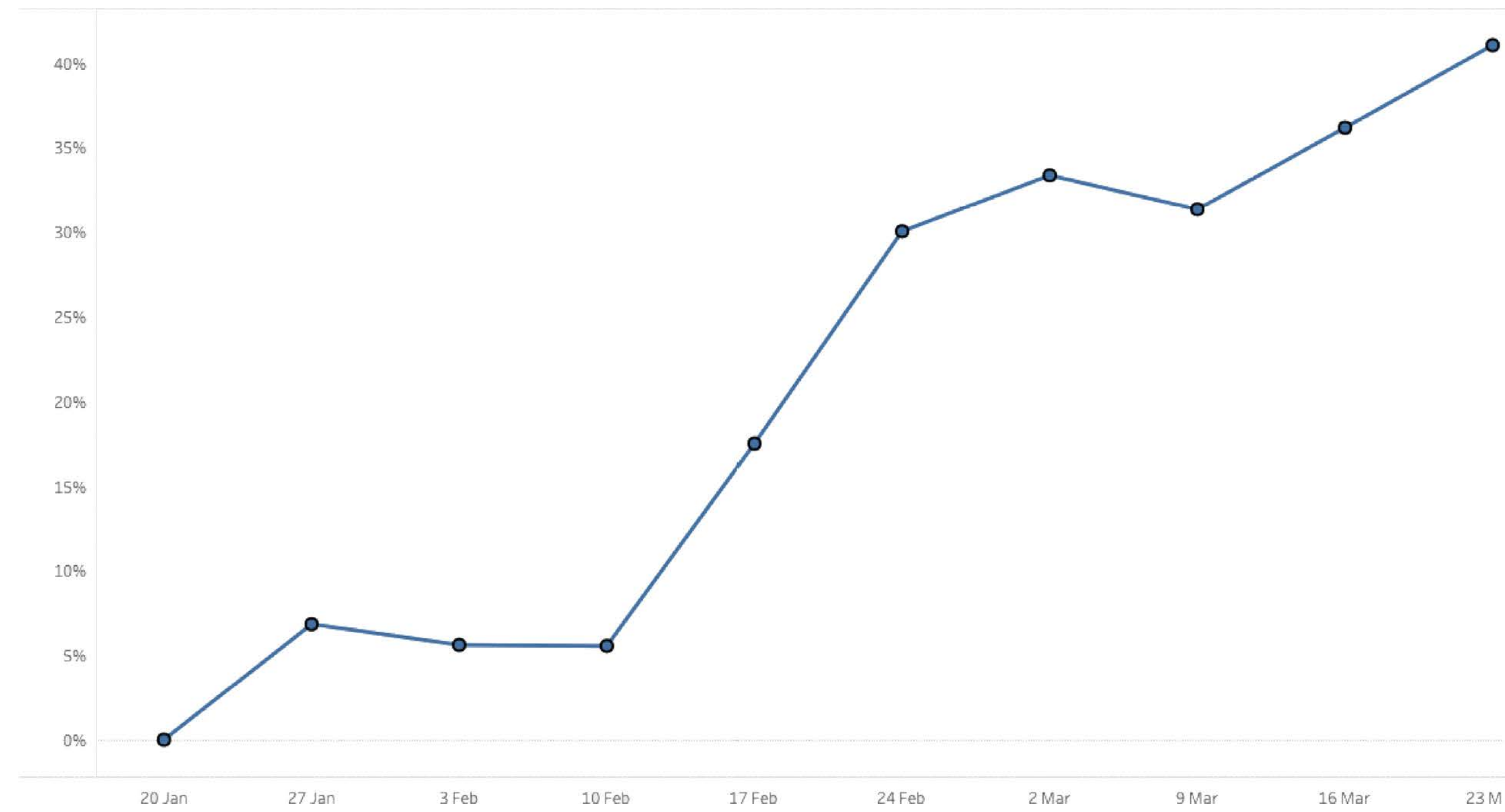
OBSERVATIONS

With major cities announcing lockdowns, self isolation and social distancing have led to a **surge** in user activity on online shopping apps in the United States, particularly for essential services like groceries, milk and medicine.

Online shopping apps have seen an **exponential increase** in both new and daily active users since the first week of March 2020.



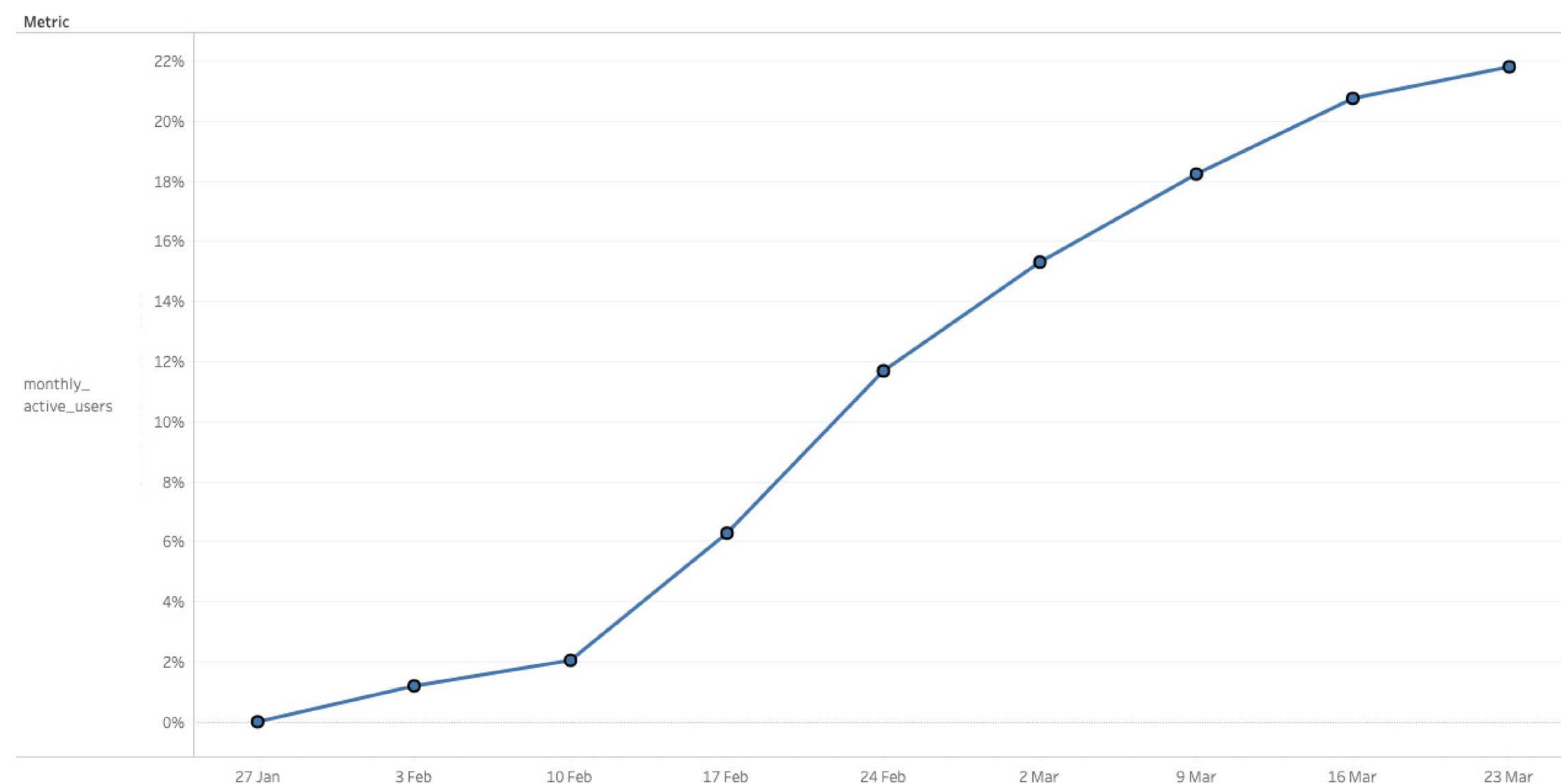
Increase in new users in March 2020 in the United States



Increase in DAU from February 2020 to March 2020 in Southeast Asia

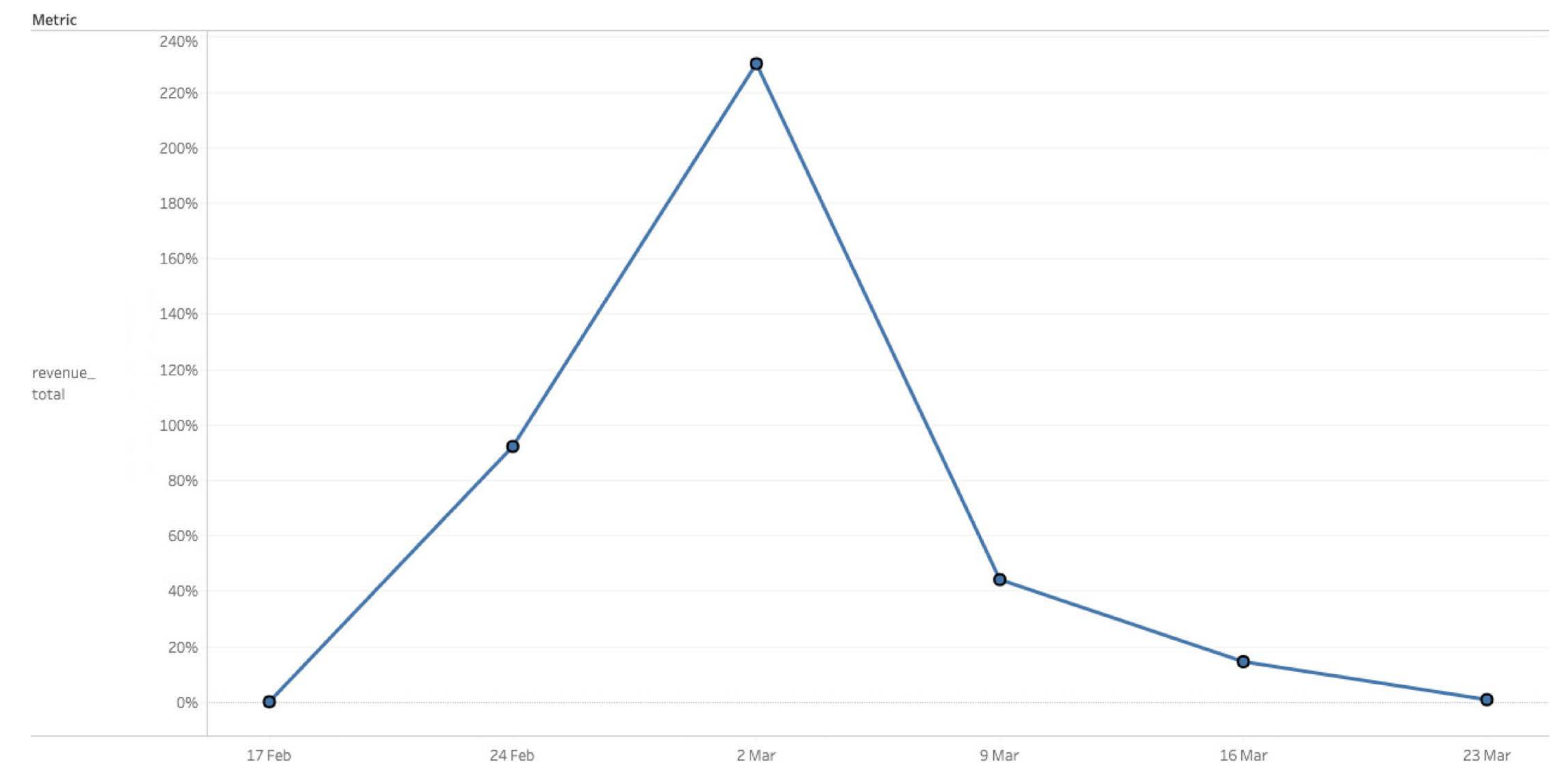
As expected, the same trend follows for MAU, i.e. , a **steady increase** since February

As expected, the same trend follows for monthly active users, i.e. , a steady increase since February 2020.



Increase in MAU from February 2020 to March 2020 in Southeast Asia

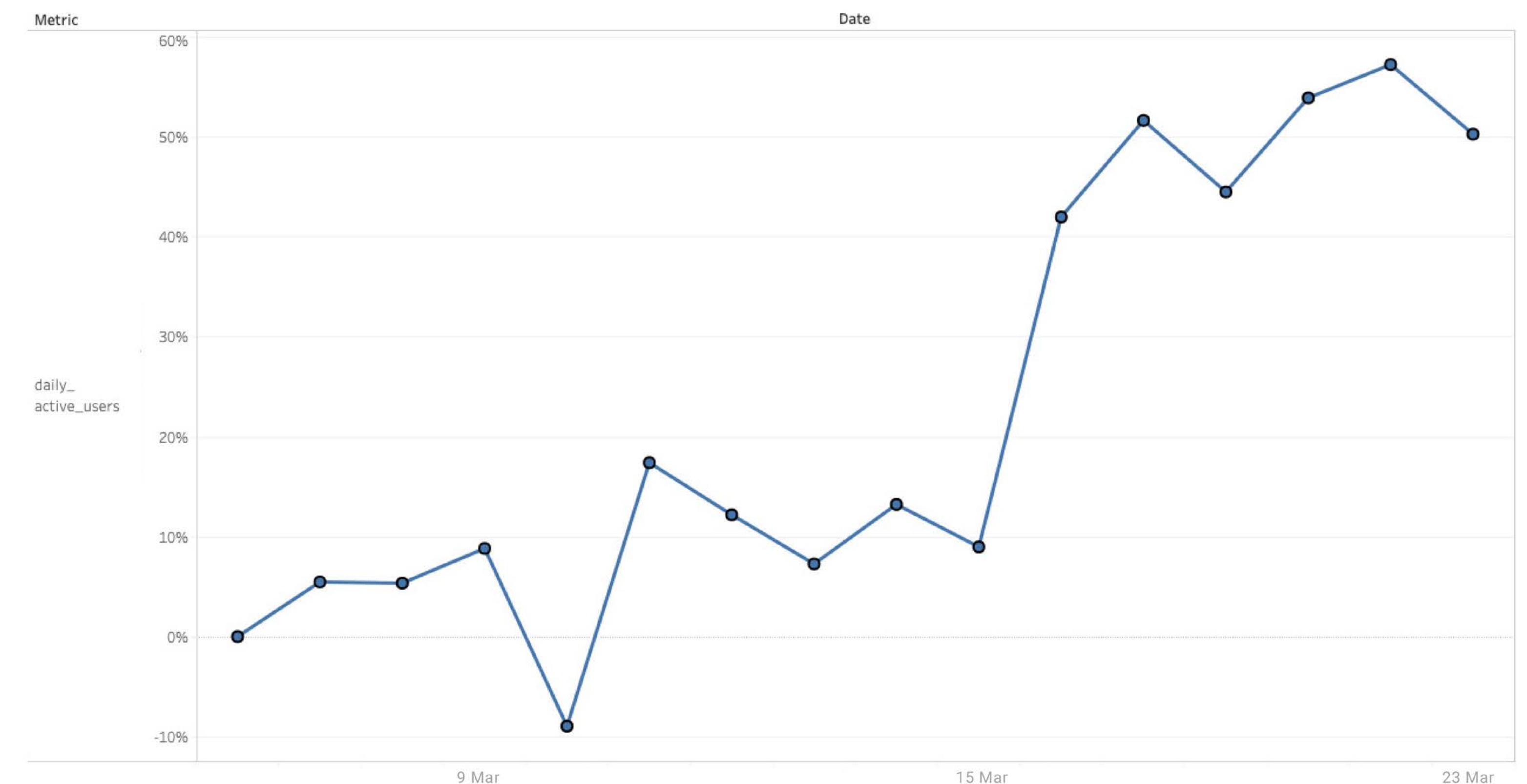
There was a **sudden increase** in spending on e-commerce apps in Southeast Asia after February, lasting till March 9. Spends hit the peak on March 2, days after WHO declared the outbreak risk to 'Very High'. Around this time, Indonesia reported its first confirmed case and South Korea had already reported more than 4,000 infections.



Increase in spends in the first week of March 2020 in Southeast Asia

LOYALTY APPS

There is an increase in the active users of loyalty apps in Southeast Asia. This trend is similar to the **increase** in active users of online shopping apps in the same region.



Increase in active users on loyalty apps in March 2020

CUSTOMER STORIES



Blibli, the e-commerce unicorn in Indonesia, is reaching out to more than **1 million users** daily with #KarenaSehatNo1 (#HealthIsNo1), their COVID-19 awareness campaign. Through emails and app push notifications that are a part of this campaign, Blibli is encouraging users to stay at home and utilize the Blibli app for their daily needs.

Since supply has taken a huge hit due to the lockdowns in Southeast Asia, Blibli is working with merchants to ensure the availability of important products such as soaps, sanitizers, anti-bacterial wipes and vitamins.

To curb stockpiling, Blibli has placed limits on the number of units of each product that a user can purchase at one time.

On the operations side, Blibli has implemented stringent sanitization procedures at their facilities – from offices to warehouses. Packages entering and exiting warehouses are thoroughly sanitized, and logistics crew are equipped with hand sanitizers and personal protection equipment such as gloves and masks.

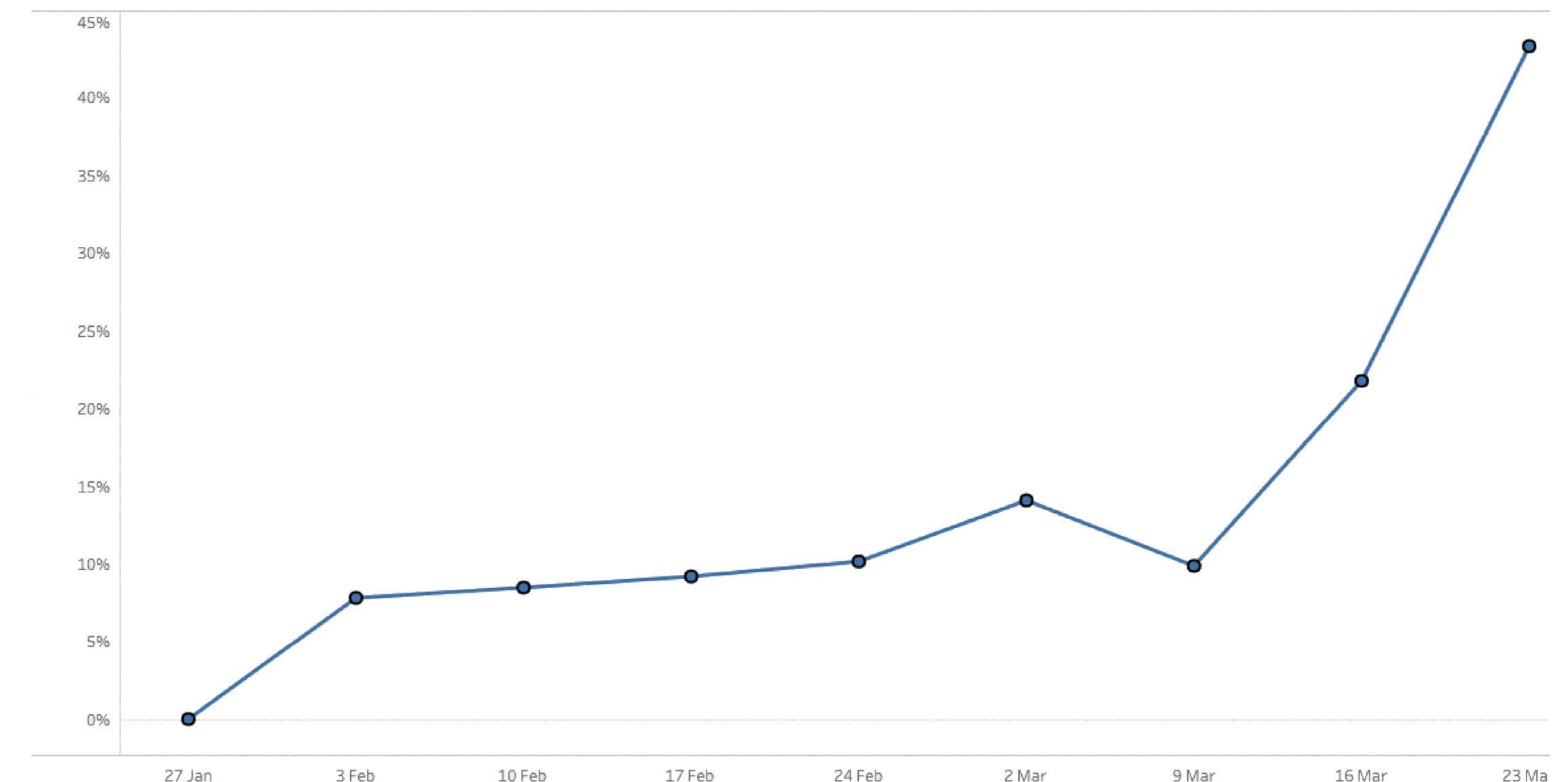
In addition, Blibli has started a contactless shipping campaign, wherein the logistics crew minimize direct contact with customers during delivery, This includes signing delivery forms on behalf of customers, with their prior permission

INDIA

OBSERVATIONS

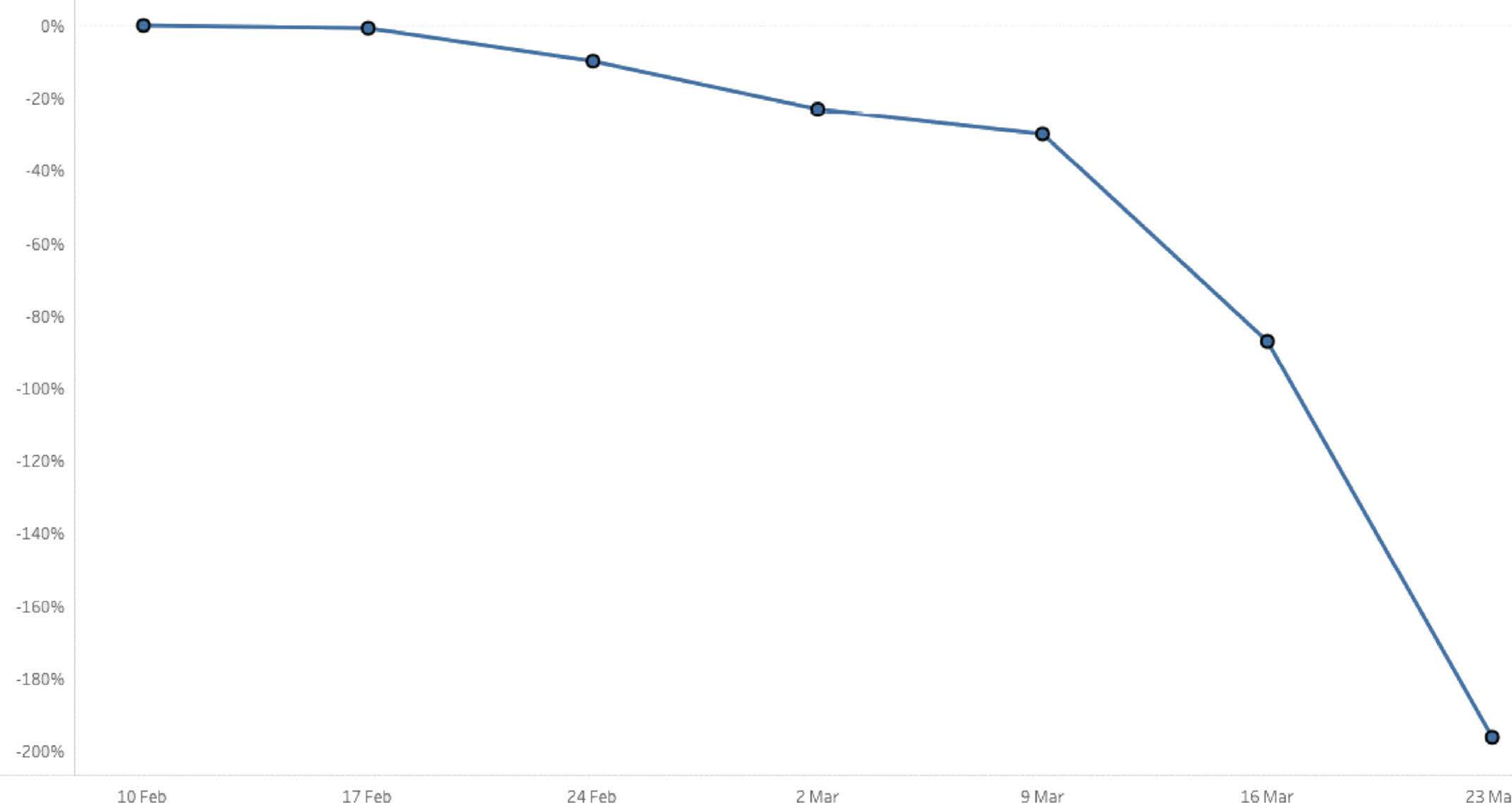
In the second week of March 2020, the Government of India urged companies to implement work from home policies and restricted both domestic and international travel.

During this time, there was a **huge surge** in the number of active users on online shopping and grocery apps. We predict this trend to continue until travel restrictions and self isolation protocols are lifted in India.



Increase in active users in March 2020 in India

In a trend that is similar to Southeast Asia, there has been a steady **decline** in the conversion rates from January 2020 to March 2020.



Decrease in conversion rate from February 2020 to March 2020 in India 2020 in India

Since January 2020, there has also been a decline in spends on online shopping apps in India. We predict that this trend will continue, especially after the Prime Minister of India imposed a mandatory lockdown across India on March 24. Due to this, both supply and workforce have been severely impacted.



Decrease in spends from January 2020 to March 2020 in India





VIDEO CONFERENCING APPS

NORTH AMERICA

Downloads **627.50%**
DAU **121.00%**

MIDDLE EAST

Downloads **155.40%**
DAU **33.50%**

INDIA

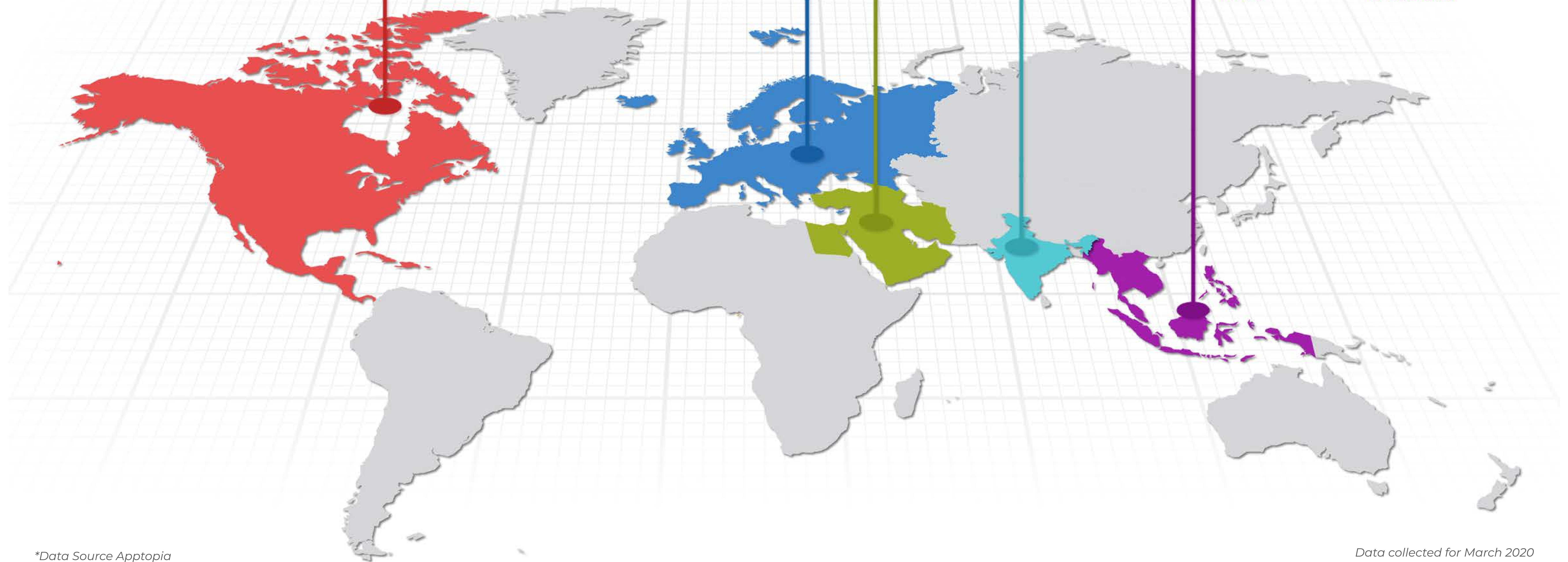
Downloads **9327.00%**
DAU **1254.50%**

EUROPE

Downloads **945.00%**
DAU **163.00%**

SOUTH EAST ASIA

Downloads **778.00%**
DAU **192.50%**



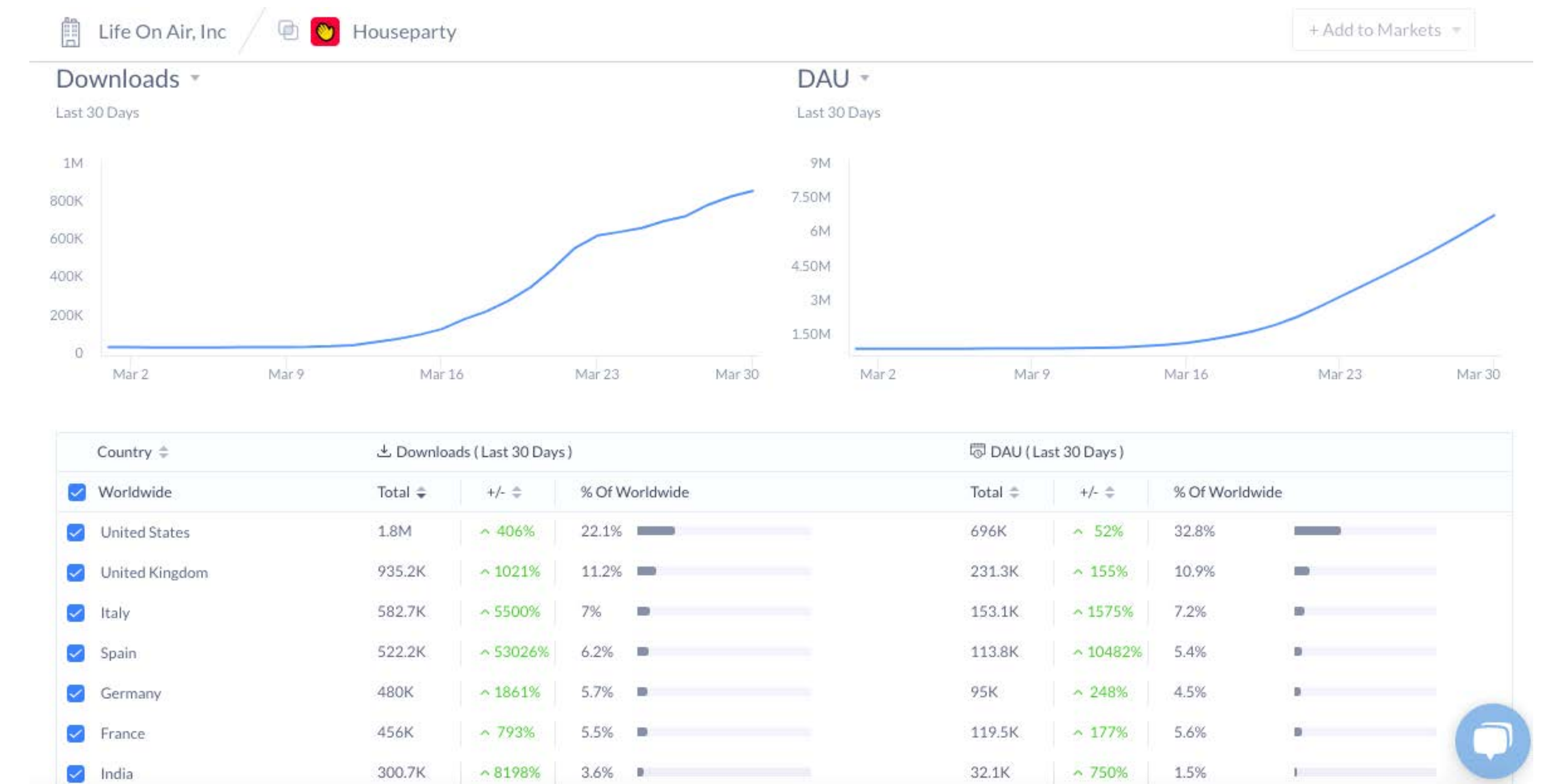
*Data Source Apptopia

Data collected for March 2020

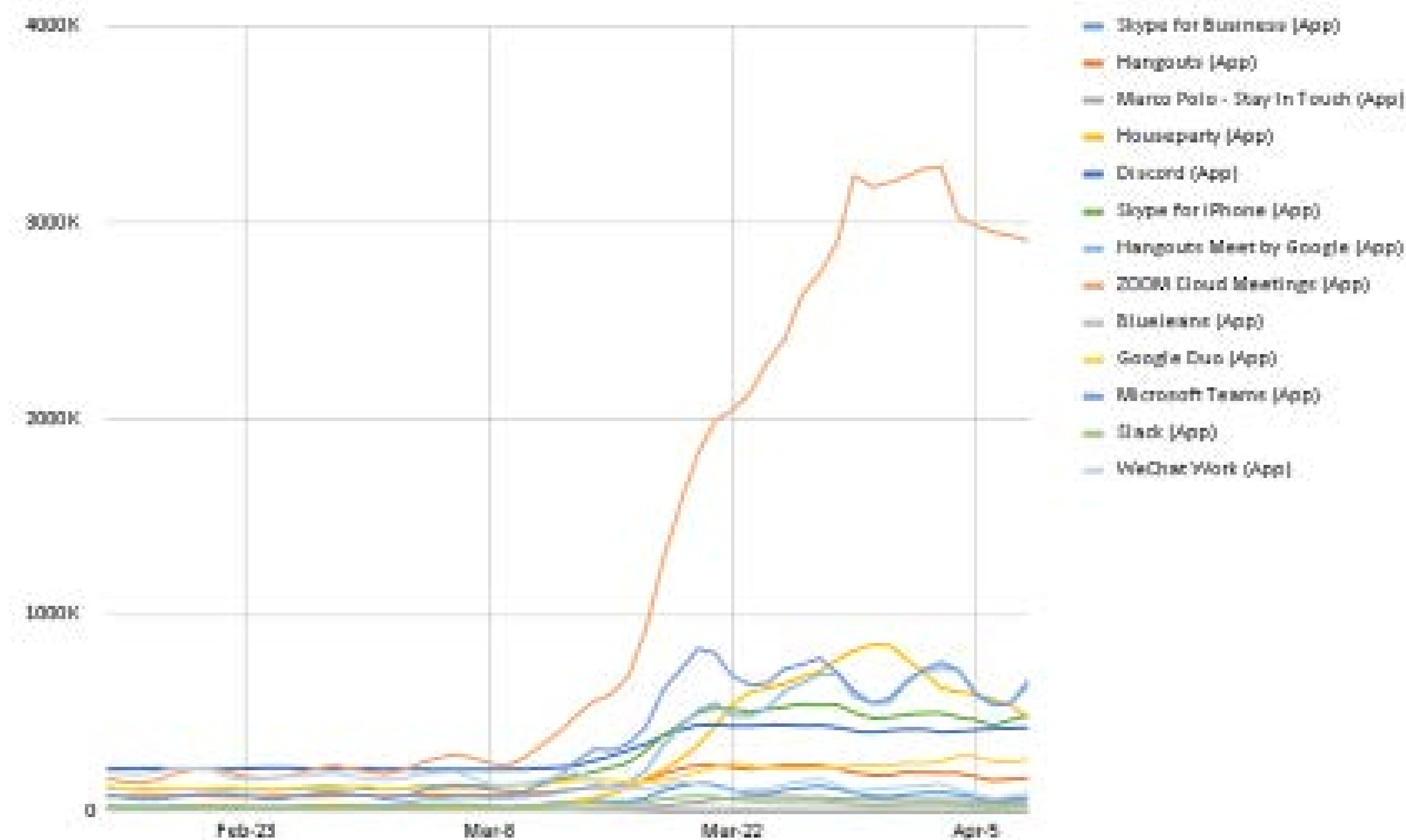


- Second by a huge margin, Microsoft Teams (including Skype) is closely followed by Google Hangouts Meet.
- We estimate this rise to continue both in terms of downloads and sessions in the weeks to come, given that Zoom addresses concerns of data leaks in the platform.

HOUSEPARTY: THIS NEW KID ON THE BLOCK KNOWS HOW TO GET YOU INTO A PARTY



WORLDWIDE TRENDS

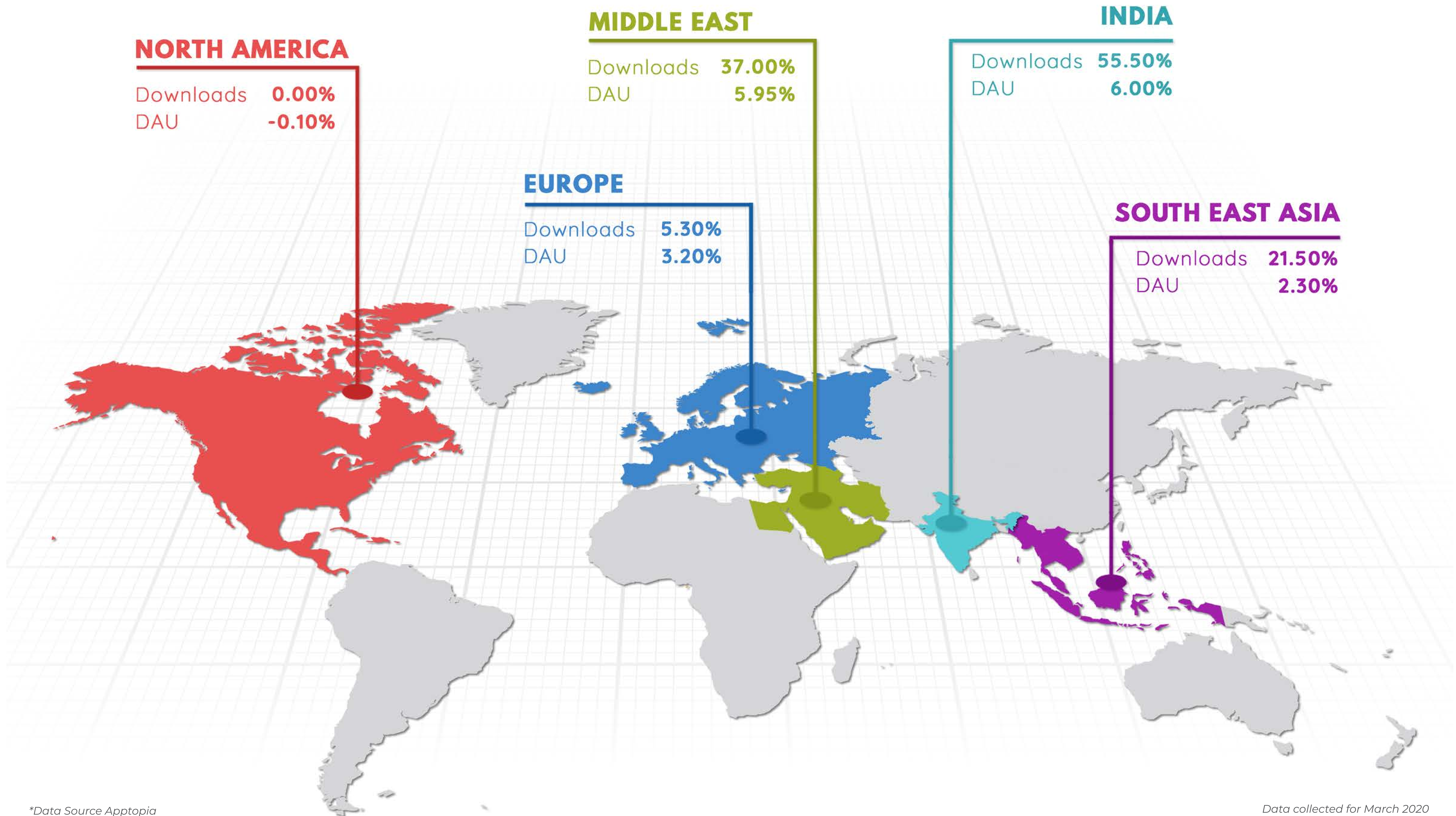


Download trends for top 13 video conferencing apps, worldwide

With companies and governments enforcing work from home policies, the upward spiral in video conferencing apps was to be expected. However, what came as a surprise was Zoom's meteoric rise as compared to other platforms.

- Early rising trends in the industry can be spotted around the first week of March.
- **Zoom**, the leader in this cohort, has **grown its new user base by almost 300% since March 8**, when work from home and social distancing policies first came into effect.

- To say that Houseparty's organic, word-of-mouth growth has been meteoric is an understatement. The app has gone absolutely viral, reporting as much as 5 digit growth rate in app downloads in the last 30 days in key geographies worldwide - **Spain (+53,026%), Italy (+5,500%), UK (+1,021%), United States (406%), India (+8198%)**.
- What has worked for the app is that these high numbers of downloads and DAU have translated into high in-app purchases as well. Geographies that brought the most revenue were the United States, UK and Italy.
- Though we expect this trend to continue in the weeks to come, possibly driven by emerging markets such as India and Brazil, data breach issues reported by users have already dented its image. Though Life On Air Inc., the parent company, refuted such claims in a statement, Houseparty still needs to be careful if it wishes to continue its current magical growth rates.

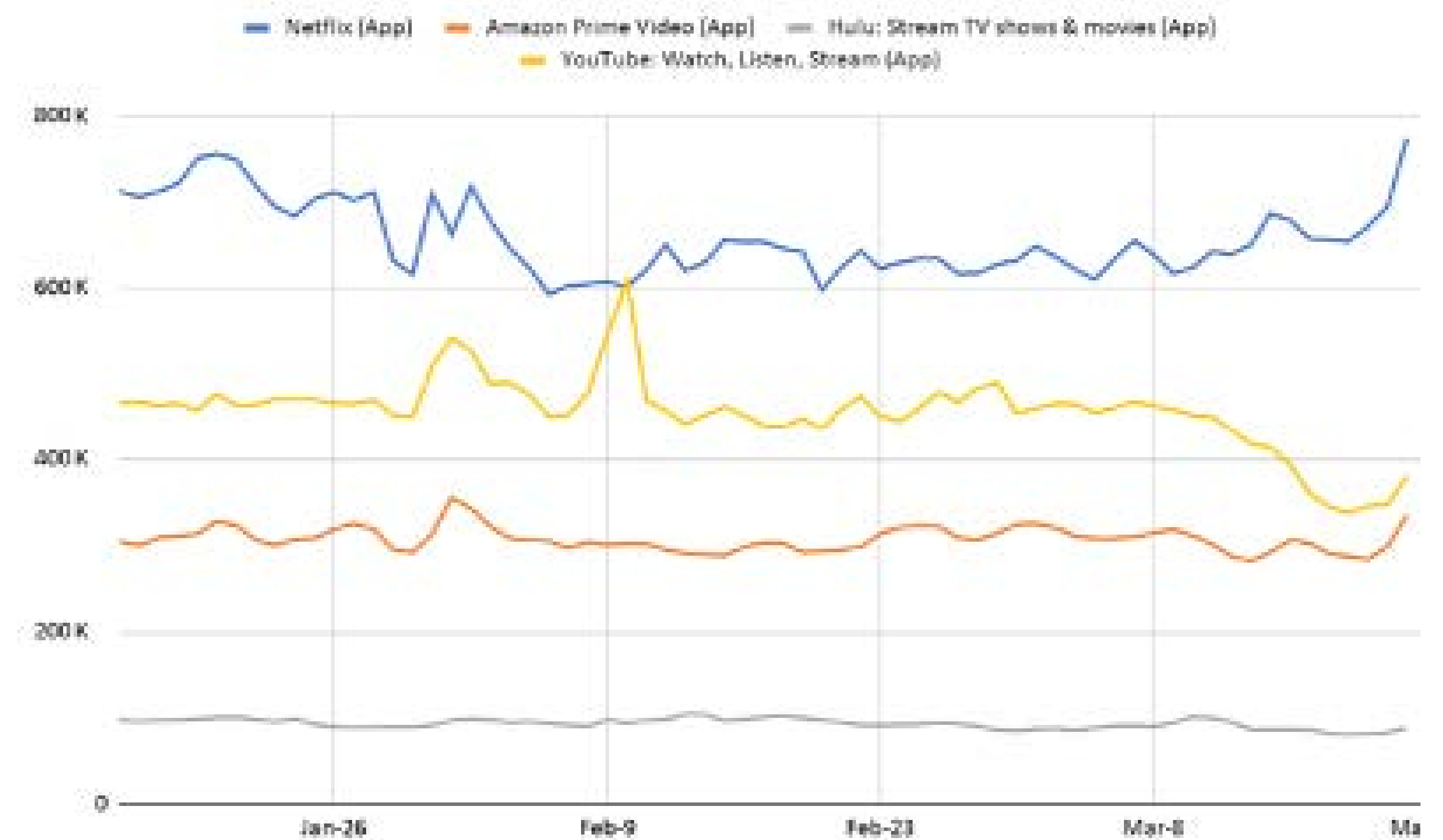


*Data Source Apptopia

Data collected for March 2020

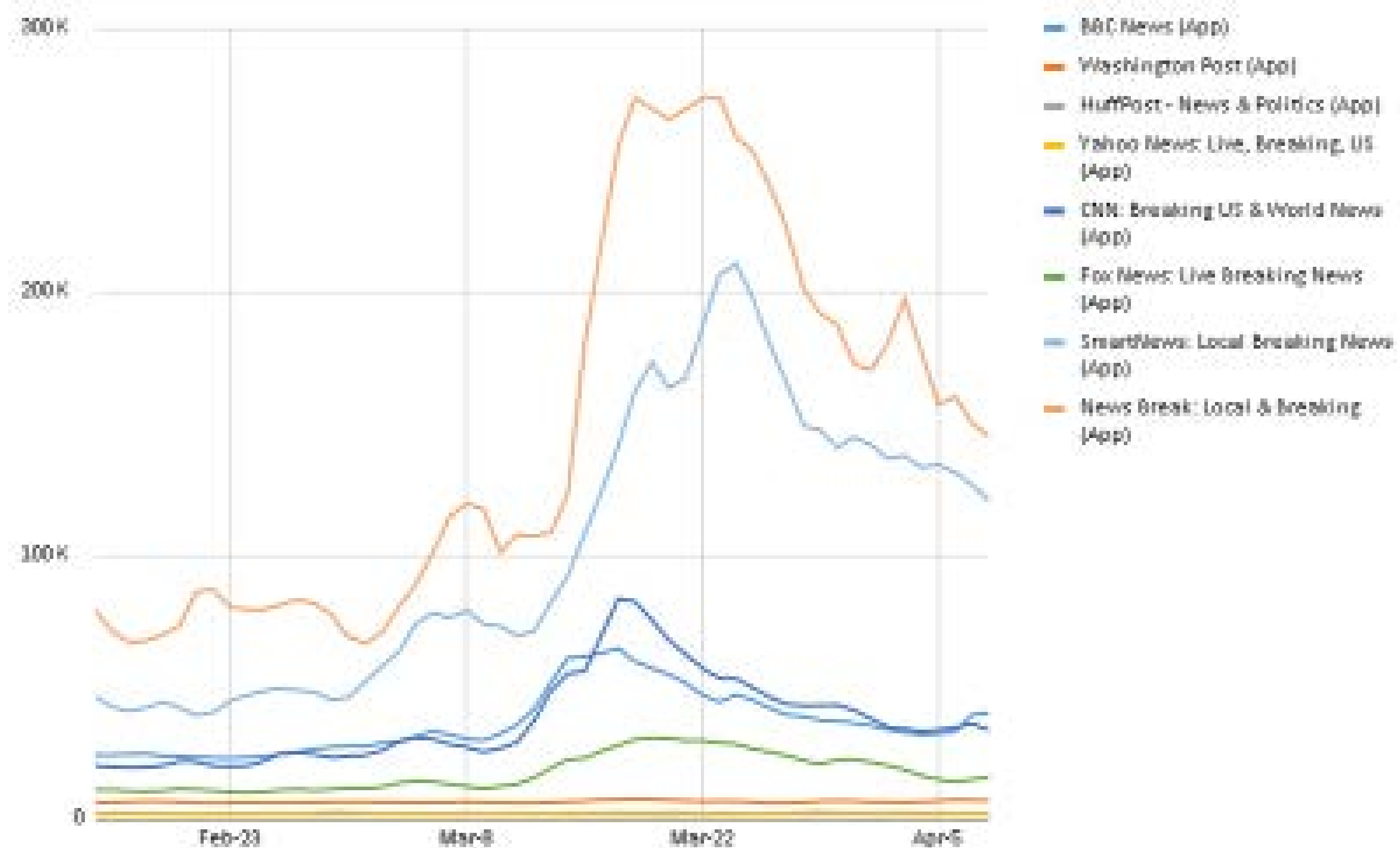


WORLDWIDE TRENDS IN ON-DEMAND ENTERTAINMENT APPS



Download trends for top 4 on-demand entertainment apps, worldwide.

WORLDWIDE TRENDS IN NEWS MEDIA



Download trends for top 13 video conferencing apps, worldwide

- Exponential upward trends in late February and early March - this coincides with the total increase in the number of COVID-19 cases worldwide.
- **200% rise in total downloads and viewership in the first two weeks of March.**

- **The entertainment industry collectively saw a late upward trend in downloads and DAU from mid to late March. Disney+ (March 14), Netflix (March 19), Amazon Prime (March 20).**
- Highest drivers of growth for Netflix in downloads in the last 30 days have been the United States (up 19.5%), Brazil (up 11.5%), Mexico (up 6.1%), and India (up 4.7%).
- iQIYI Video – Dramas & Movies, largely considered as the ‘Netflix of China’ has seen exponential growth since the first week of March. The highest contributors of growth to this app are Thailand (up 439%), Indonesia (up 13%), Vietnam (up 50%) and Philippines (up 688%).
- YouTube, arguably the oldest of the lot, surprisingly saw a drop in overall app downloads as well as DAU. We have reason to believe that this deviation from the general industry trend is due to the consumer’s screen time being consumed by other on-demand entertainment streaming apps. More on this r in the Bonus Read section.

DID YOU KNOW?

Disney+ launched in most European countries on March 24, amidst lockdowns, and received huge boosts in downloads and DAU. **Combined downloads in this region are well above 2 million.**

| Country | Downloads (Last 30 Days) | | | DAU (Last 30 Days) |
|----------------|--------------------------|--------|----------------|--------------------|
| | Total | +/- | % Of Worldwide | Total |
| Worldwide | | | | |
| Spain | 206.5K | ↑ 100% | 3.6% | 91.6K |
| Ireland | 52.1K | ↑ 100% | 0.9% | 24.2K |
| Germany | 318.2K | ↑ 100% | 5.5% | 142.8K |
| United Kingdom | 437.3K | ↑ 100% | 7.6% | 207.3K |
| Austria | 18.9K | ↑ 100% | 0.3% | 8.5K |
| Italy | 199.3K | ↑ 100% | 3.4% | 85.5K |
| Switzerland | 44.9K | ↑ 100% | 0.8% | 20.2K |

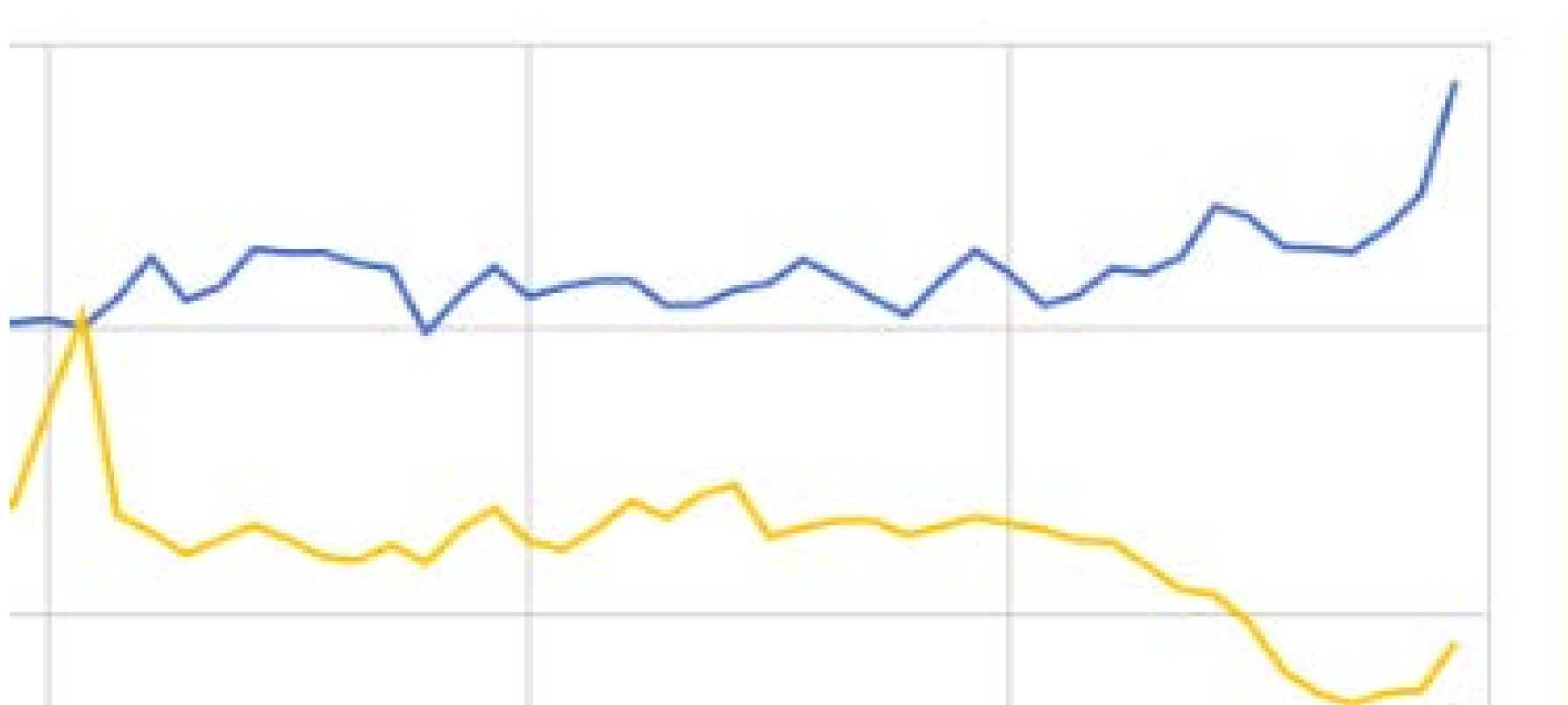
BONUS READ

The consumer video streaming behavior - YouTube vs Netflix.

For a minute, observe your own on-screen video consumption patterns. Make a mental note of the time you have spent on platforms such as YouTube, Netflix, Hulu, Disney+ or Amazon Prime in the last three months. When you're ready, read on.

If your calculation shows that you've spent considerably more time on apps such as Netflix instead of YouTube, you are not alone. We have data to back this up.

Here is an interesting graph that shows the pattern of DAU since February 9.



No, we're not kidding. There is no imaginary mirror between the two lines on the graph. The blue line on top is the 30 day trend for Netflix and the orange one below is the trend for YouTube for the same period. If one sees the DAU for the last 90 days instead, the drop in sessions and downloads for YouTube magnifies the image even more.

Why is this happening?

We have reasons to believe that consumer preference in video streaming is gradually shifting to larger duration curated content. Though YouTube is still the best way to go online and showcase your product's capability to the entire world, the viewing trends clearly show a swing in consumer behavior.

A swing that we feel is here to stay. **Is the parent company, Alphabet, cognizant of this?**

Yes, of course. In as early as 2015, YouTube launched YouTube Premium (20 million subscribers worldwide) and more recently, YouTube originals, in order to provide ad-free, curated content experiences. Sadly, neither of these have seen much traction with users despite aggressive efforts by YouTube to market them.

What should YouTube do?

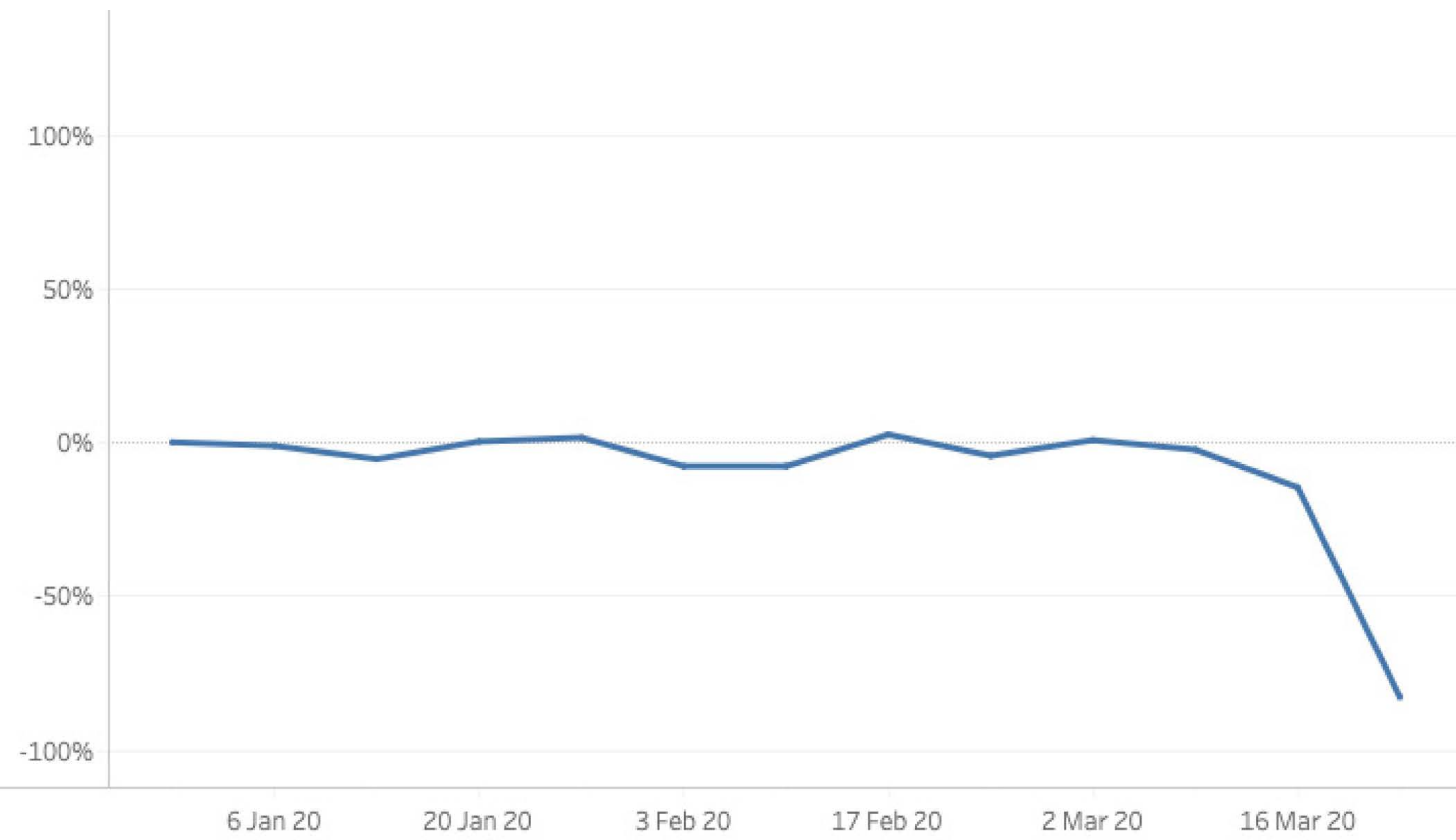
Though not a cumulative success, YouTube Originals has seen some localized upswing. Similar to the way viewers boarded the Netflix bandwagon with House of Cards, YouTube could also be one show away to get the numbers it needs. Content specific to regions, languages, and interests could definitely turn up the heat. YouTube already contributes a significant portion of the revenue for its parent company Alphabet Inc. If the leadership team there decides to go all out to compete with Netflix, it's a target they can very well achieve.

INDIA

Industry sees a huge boost as Indians turn to on-demand entertainment apps.



Continuous upward trend in MAU. An overall 8% growth in total users in 2020.



Uninstalls in the industry have dropped to the lowest in 2020. An overall reduction by 80% in app uninstalls for media and entertainment apps.

DID YOU KNOW?

Hotstar, owned by Disney+, and one of India's leading on-demand live-streaming entertainment apps, is struggling to retain its user base as DAU and downloads have both fallen to the lowest in 2020. An important reason for this is the halting of cricket tournaments in the subcontinent, the biggest attraction for users of Hotstar.

We expect the trends to improve with the inclusion of Disney+ shows on the app. Disney+ formally launched in India on March 29.



| Country | Downloads (Last 60 Days) | | | DAU (Last 60 Days) | | |
|----------------|--------------------------|---------|----------------|--------------------|--------|----------------|
| | Total | +/- | % Of Worldwide | Total | +/- | % Of Worldwide |
| Worldwide | | | | | | |
| India | 11.9M | ↓ 34.6% | 99.3% | 9.9M | ↑ 8.1% | 99.6% |
| United States | 53.5K | ↓ 6.9% | 0.4% | 27.7K | ↑ 1.7% | 0.3% |
| Canada | 22K | ↓ 7.6% | 0.2% | 11.1K | ↑ 5.7% | 0.1% |
| United Kingdom | 12.8K | ↓ 25.2% | 0.1% | 4.5K | ↑ 34% | 0% |

NETFLIX INDIA LEADS FROM THE FRONT

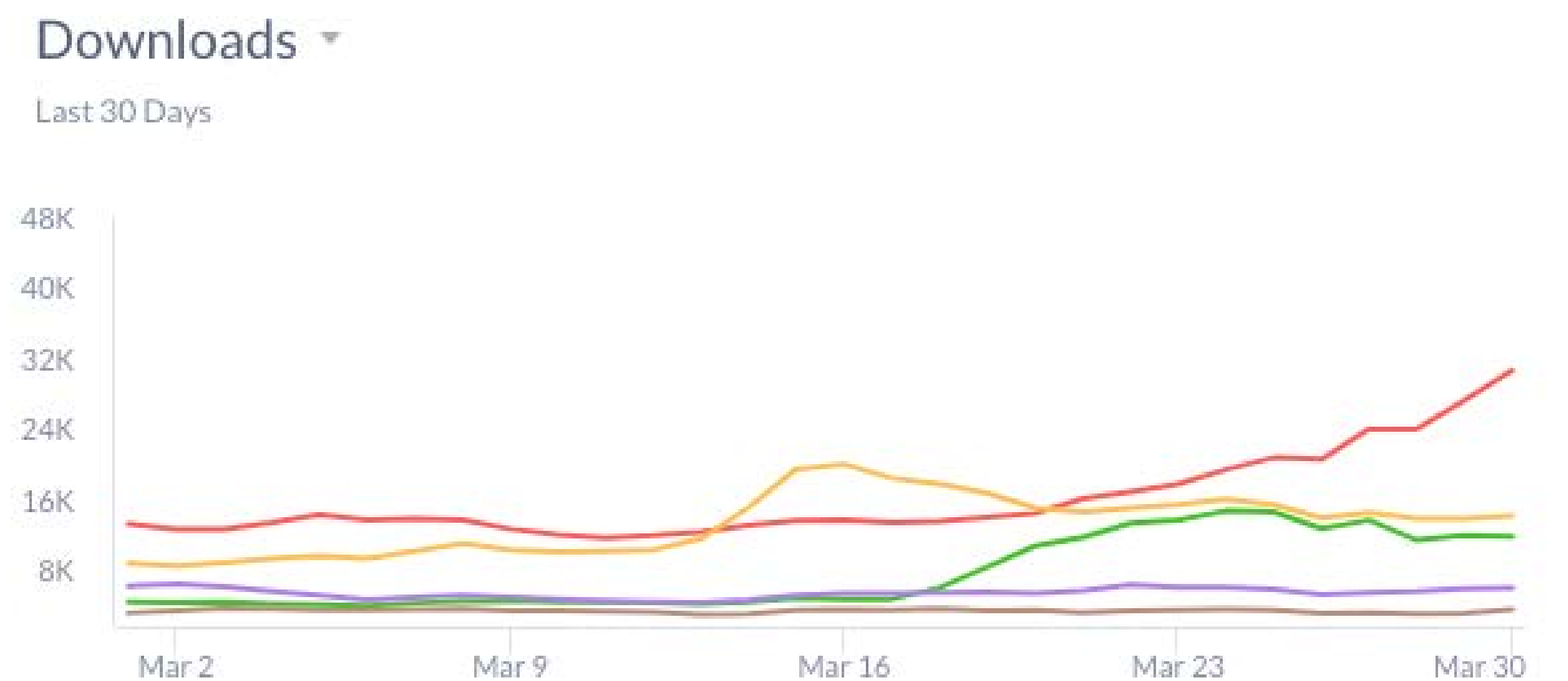
India has been a major contributor to the worldwide growth of Netflix in the last 30 days (+40%). India has increasingly become a huge revenue generating geography for the entertainment giant whose biggest markets are the United States, Brazil and



| Country | Downloads (Last 30 Days) | | | DAU (Last 30 Days) | | |
|---------------|--------------------------|--------|----------------|--------------------|--------|----------------|
| | Total | +/- | % Of Worldwide | Total | +/- | % Of Worldwide |
| Worldwide | | | | | | |
| United States | 4M | ↑ 9.4% | 19.1% | 40.5M | ↑ 0.4% | 36% |
| Brazil | 2.4M | ↑ 10% | 11.7% | 15.8M | ↑ 1.2% | 14% |
| Mexico | 1.3M | ↑ 2.6% | 6.1% | 8.3M | ↑ 1.1% | 7.3% |
| India | 1.1M | ↑ 40% | 5.4% | 3M | ↑ 3% | 2.7% |

SOUTHEAST ASIA

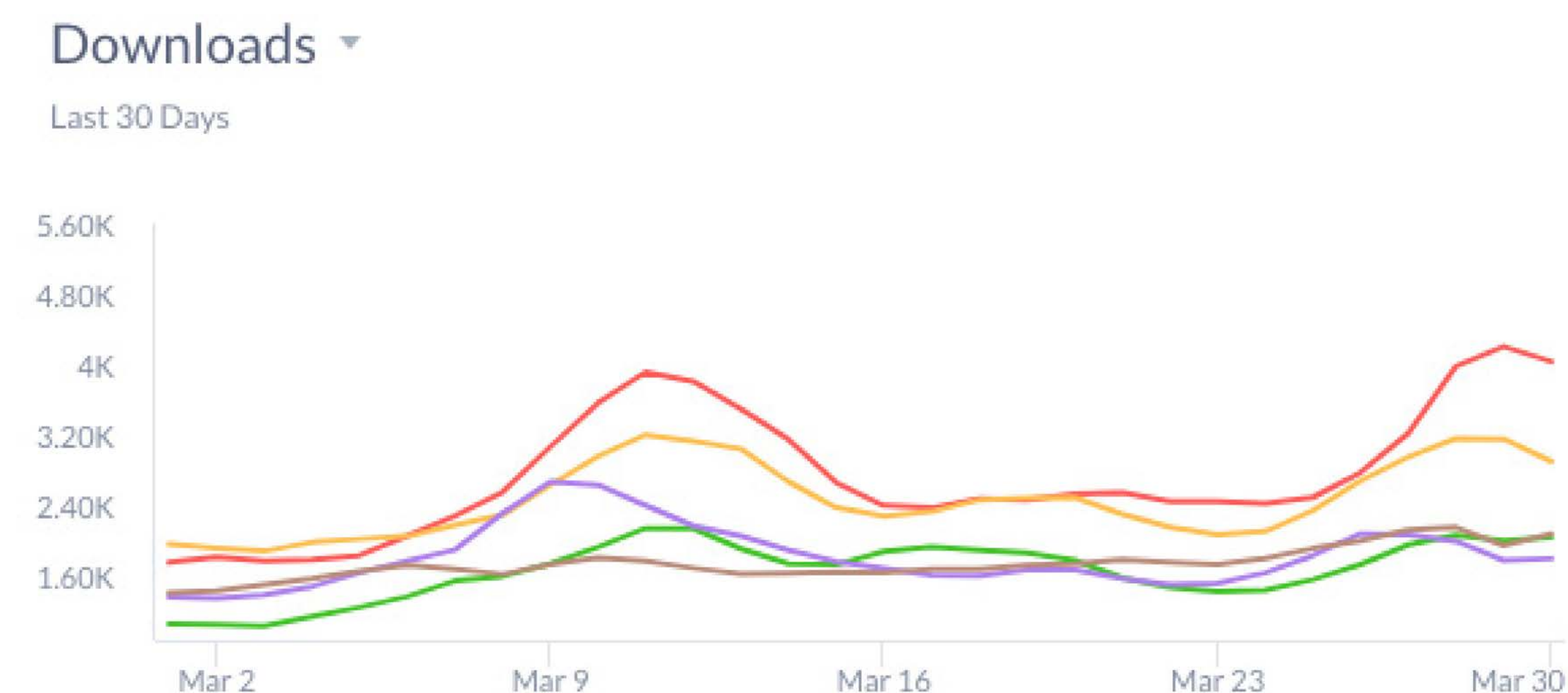
Battle of the Entertainment Apps: It's Netflix vs iQIYI vs V Live



Netflix's growth in Southeast Asia has seen an upward trend, with **Indonesia (+16%, last 30 days)** and **Malaysia (+35%, last 30 days)** being the key drivers.



iQIYI, popularly known as the 'Netflix' of China, has seen huge growth through the duration of the quarantine. Biggest contributors to iQIYI's growth have been **Thailand (+455%), Indonesia (+17%) and Vietnam (+60%)**.



| Country | Downloads (Last 30 Days) |
|-----------|------------------------------|
| | Total +/- % Of Worldwide |
| Worldwide | |
| Korea | 144.4K -13.4% 21.1% |
| Indonesia | 82.1K +14% 12% |
| Vietnam | 73.9K +7.7% 10.8% |
| Japan | 54.6K +34% 8% |
| China | 52K +19% 7.6% |
| Thailand | 49.7K +28% 7.3% |

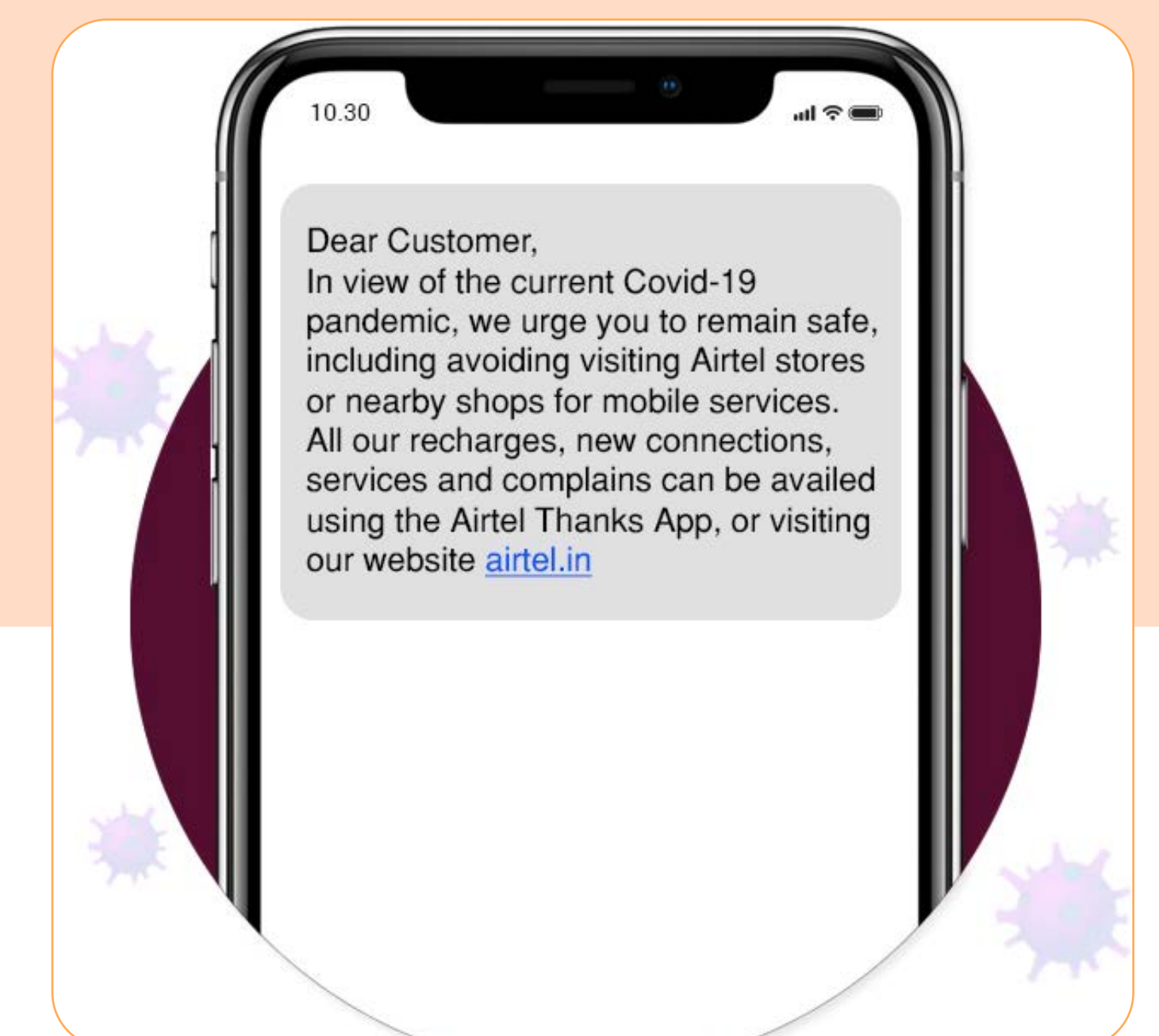
V Live, the South Korean live streaming service and an early entrant to Southeast Asian markets, has also seen sustainable growth over the last 30 days. Key drivers of growth for V Live have been **Indonesia (+14%), Vietnam (+7.7%) and Japan (+34%)**.

CUSTOMER STORIES



A nationwide lockdown in India has led to an enormous spike in the consumption of entertainment at home via OTT platforms. Airtel Xstream, a premium destination for Indians to watch movies, TV shows & LIVE channels, has moved beyond entertainment to run an awareness campaign about COVID-19. The video campaign, #GetCuriousIndia, has been developed in partnership with Curiosity Stream, one of Airtel Xstream's content partners.

Throughout the campaign, using push notifications and strategic in-app placements, Airtel Xstream helped viewers learn how the COVID-19 infection spread across the world. The brand promoted documentaries, LIVE news & upcoming stats among their viewers to spread awareness.





FOOD DELIVERY APPS

NORTH AMERICA

Downloads **12.00%**
DAU **4.00%**

MIDDLE EAST

Downloads **-45.00%**
DAU **-10.00%**

INDIA

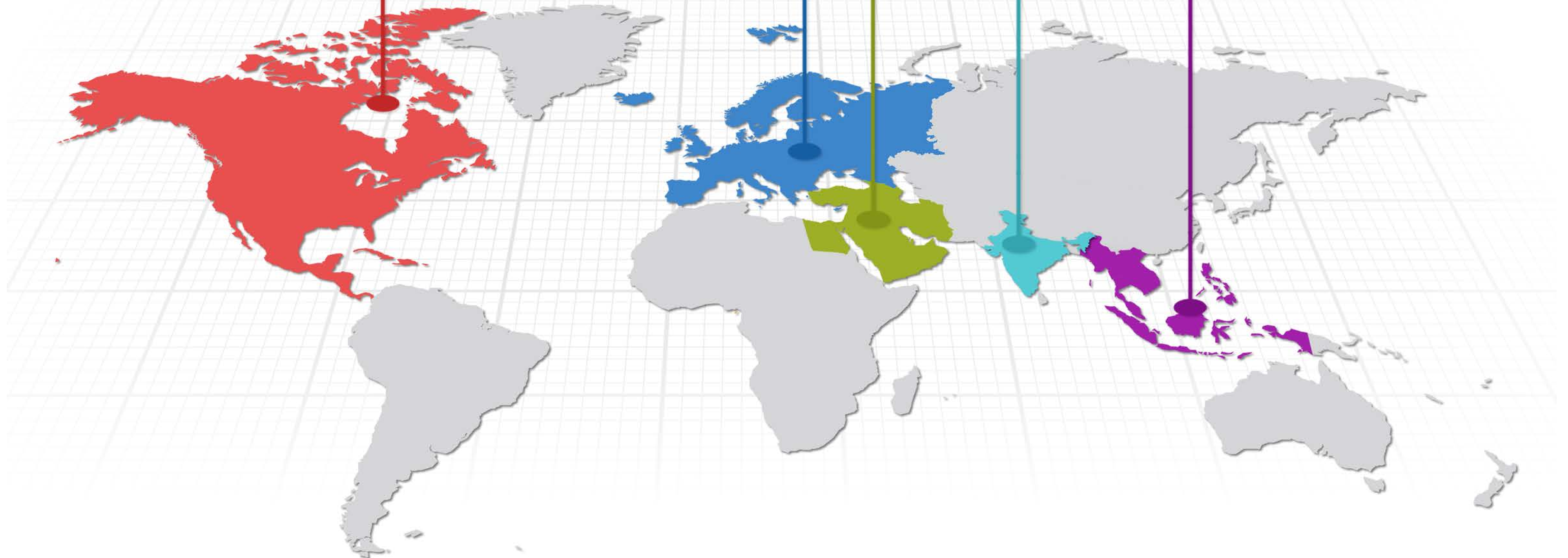
Downloads **-23.00%**
DAU **-10.00%**

EUROPE

Downloads **-15.50%**
DAU **0.00%**

SOUTH EAST ASIA

Downloads **21.00%**
DAU **4.00%**

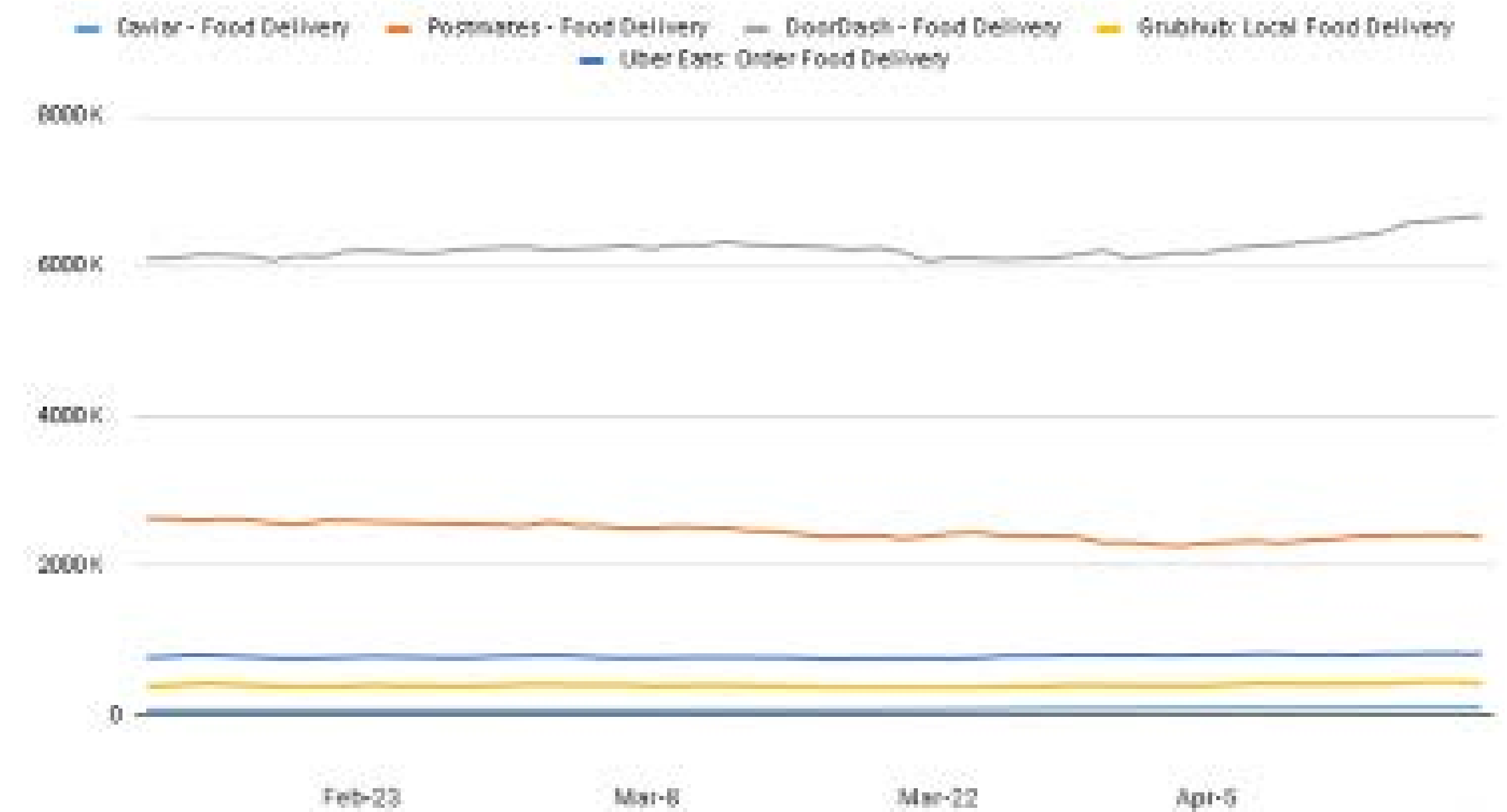


*Data Source Apptopia

Data collected for March 2020



On the other hand, the number of active users on food delivery apps have **increased** slightly.



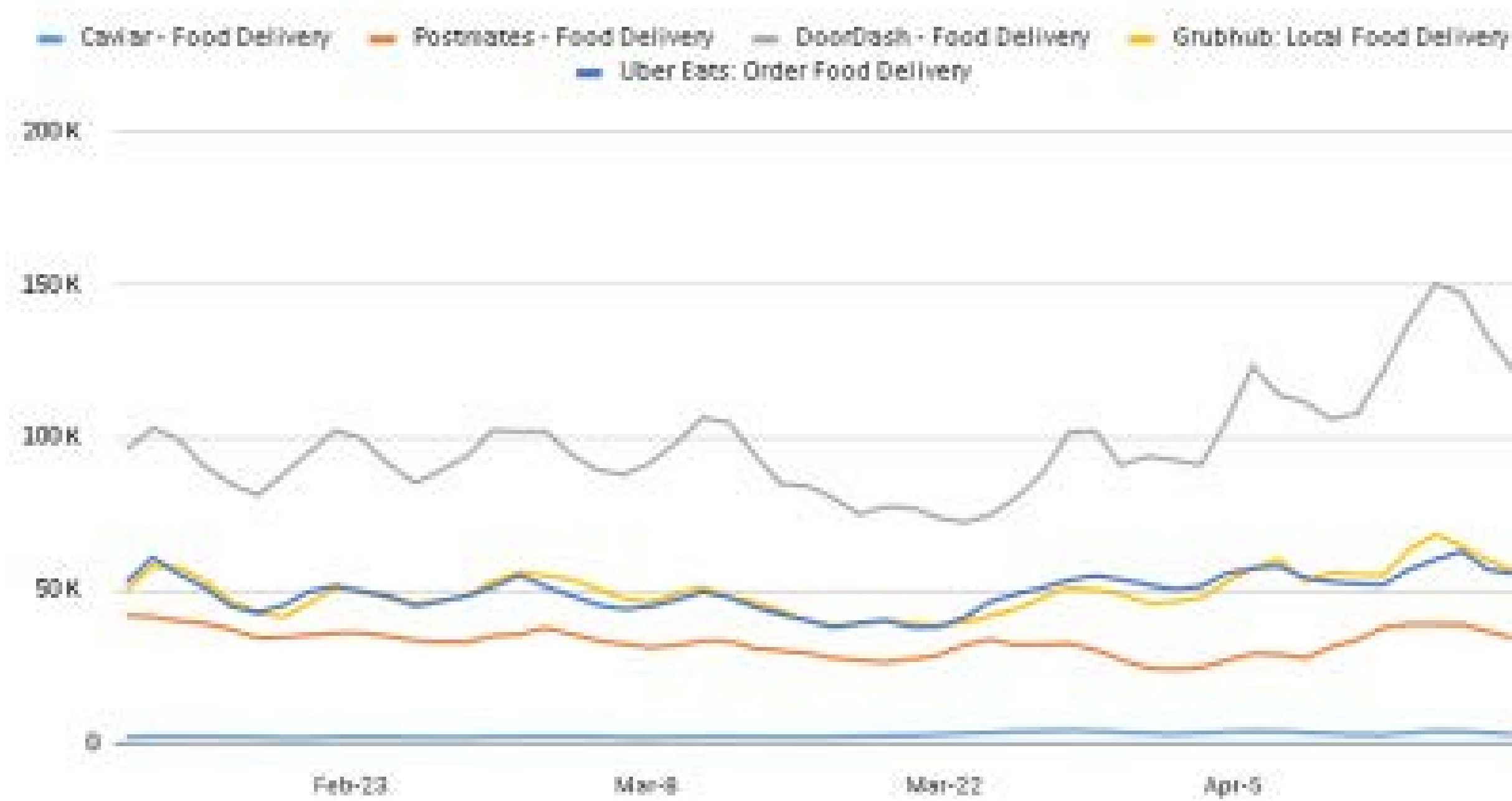
Increase in DAU from January 2020 to March 2020 in the United States

We predict that this trend will continue in the coming months as self isolation and quarantine become increasingly vital to prevent the spread of the COVID-19 pandemic.

UNITED STATES

OBSERVATIONS

There has been a **steady increase** in the number of active users of online food delivery apps since March 2020.



Increase in new users from in March 2020 in the United States

INDIA

OBSERVATIONS

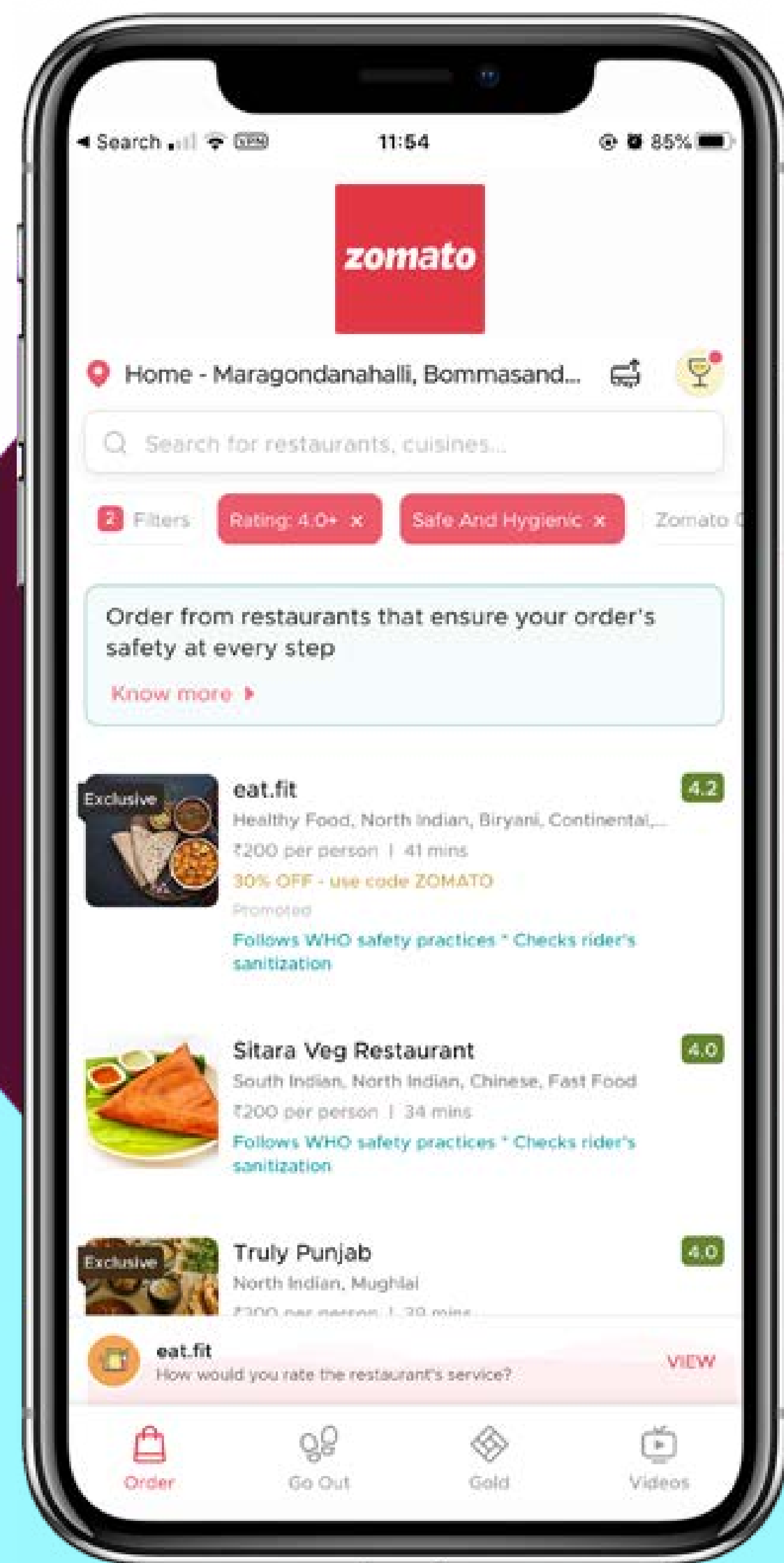
Food delivery apps in India, on the other hand, are struggling to get new users and keep their existing customers active. There is a **steady decline** from February 2020 to March 2020.



Decrease in active users from January 2020 to March 2020 in India

We believe this decline will continue in the coming months, especially since most companies will stagger their workforce back to office after the 3 week government imposed lockdown. It is worth noting that this lockdown is far more severe compared to North America and Southeast Asia.

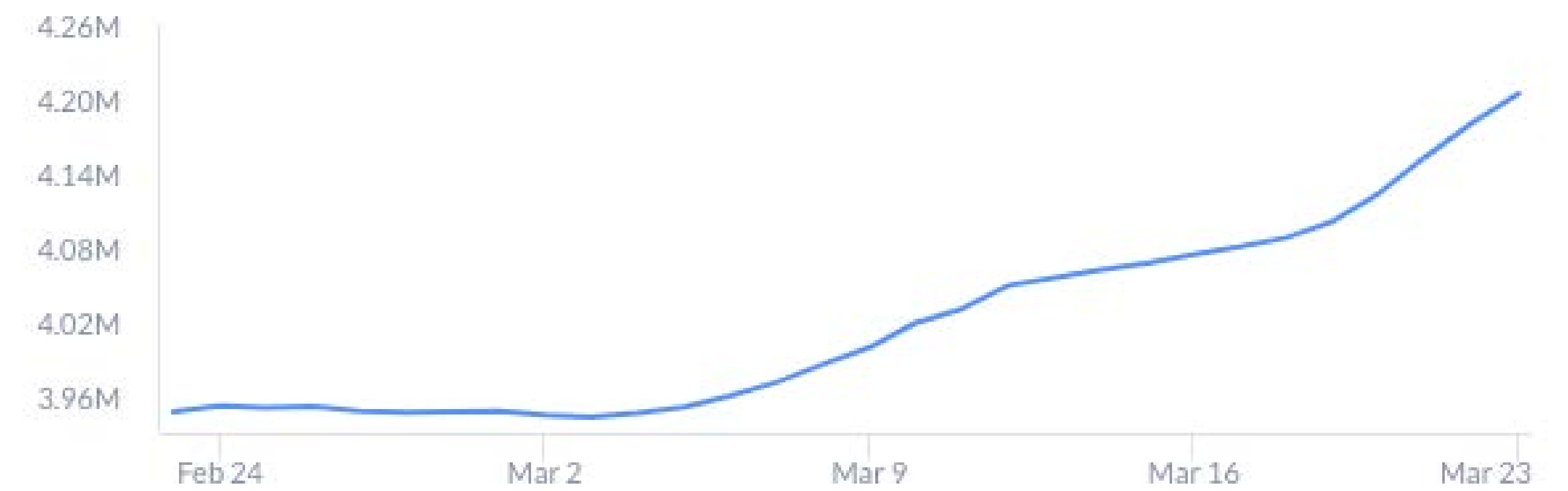
To increase consumer trust, Zomato has started adding a 'Follows WHO Practices' tag to select restaurant partners who take extra care to sanitize packaging in line with WHO mandated protocols.



SOUTHEAST ASIA

🔍 OBSERVATIONS

In Southeast Asia (Thailand, Malaysia, Philippines, Taiwan, Hong Kong and Singapore), online food delivery apps have seen an **increase** in new users and active users, similar to the trend in the United States.



Increase in active users from February 2020 to March 2020 in Southeast Asia



REAL ESTATE & RENTALS

NORTH AMERICA

Downloads **-29.15%**
DAU **-1.40%**

MIDDLE EAST

Downloads **13.00%**
DAU **2.60%**

INDIA

Downloads **-48.25%**
DAU **-23.00%**

EUROPE

Downloads **-33.80%**
DAU **-6.00%**

SOUTH EAST ASIA

Downloads **-19.20%**
DAU **-7.90%**



*Data Source Apptopia

Data collected for March 2020



The real estate and rental services giant, Zillow, reports downward trends in new app downloads as well as DAU. **The company has seen a combined worldwide drop in downloads of 23.6%.** Although the app's primary market is the United States, it has seen increasing contributions to revenue coming in from China, Canada and the UK.

These trends are hardly a surprise.. As long as social distancing policies continue, house hunting will be the last of consumers' concerns. Shopping for groceries and essentials will keep them busy for the time being.

Here are the country-wise data drops in downloads and DAU for Zillow in the last 30 days:

| UNITED STATES | CHINA | CANADA |
|----------------------------|--------------------------|---------------------------|
| Downloads: 846,200, -23.6% | Downloads: 9,800, -43.3% | Downloads: 7,200, - 18.8% |
| DAU: 1.7 million, -0.1% | DAU: 5,500, -36.1% | DAU: 12,800, +0.5% |

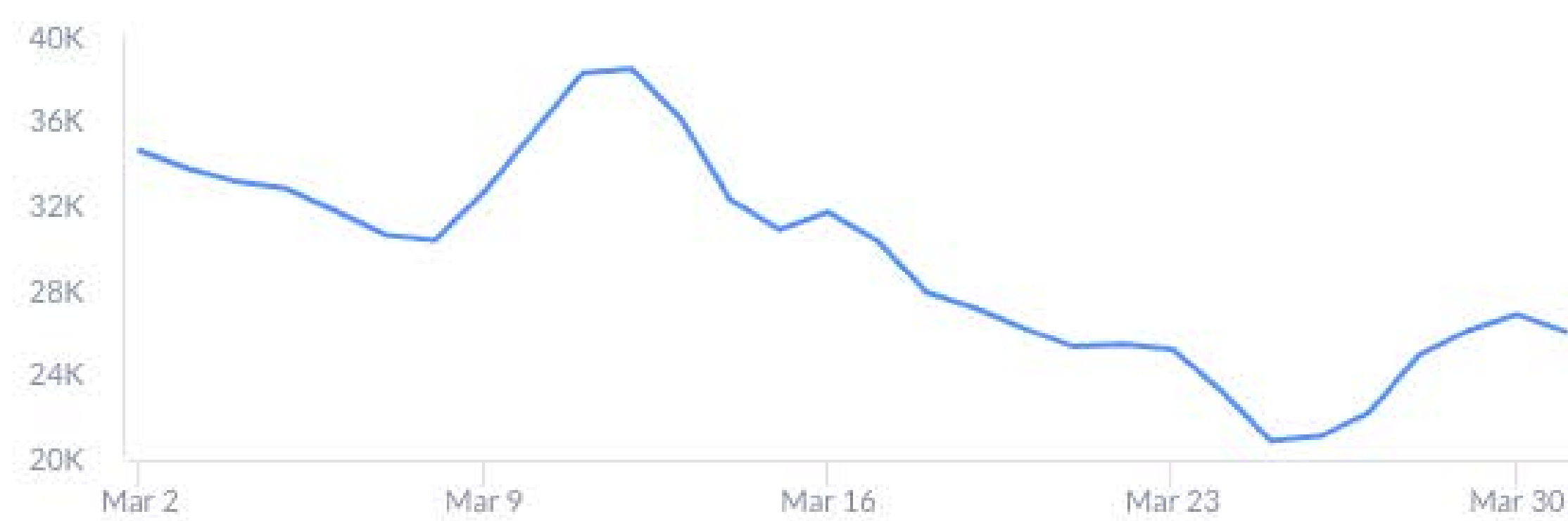
SOUTHEAST ASIA

Consumer confidence takes a hit after a busy start to 2020

WORLDWIDE TRENDS

Downloads ▾

Last 30 Days



DAU ▾

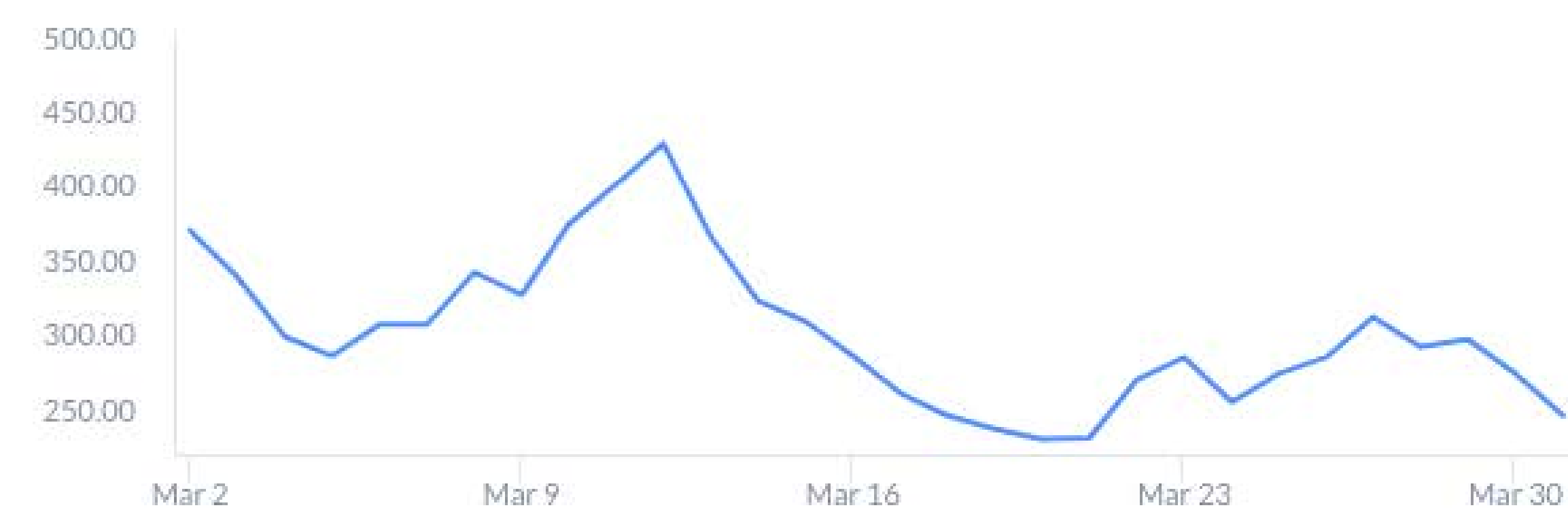
Last 30 Days



Download and DAU trends for Zillow, in the last 30 days.

Downloads ▾

Last 30 Days



DAU ▾

Last 30 Days



Uoolu's Downloads and DAU trends in last 30 days.

Uoolu, China's biggest real estate and rental services provider that also lists overseas property, saw a busy start to 2020 with a 40% surge in DAU. But this was before COVID-19 hit the industry hard. Things have changed drastically now, with DAU dropping 40% in the last 30 days alone.

Data for Uoolu in China from the last 30 days:

Downloads: 9,000, -43.6%

DAU: 6,200, -40%

INDIA

Indian real estate industry follows international trend as DAU drops by 30%



The DAU trend in the industry dropped by 60% in March alone. Combined drop since January 1 is 30%.

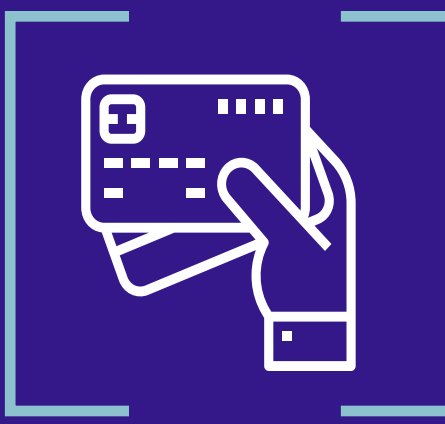
The DAU trend in the industry dropped by 60% in March alone. Combined drop since January 1 is 30%.



The drop in new users is even more obvious - a combined drop of 90% since January 1, with a sharp decline of over 100% in March.

The drop in new users is even more obvious - a combined drop of 90% since January 1, with a sharp decline of over 100% in March.

We expect this trend to continue until the government mandated countrywide lockdown ends in mid-April. How the industry picks up post April 16 will be a story worth following.



BANKING, FINANCIAL SERVICES AND INSURANCE

NORTH AMERICA

Downloads **-16.00%**
DAU **-29.00%**

MIDDLE EAST

Downloads **-8.00%**
DAU **-18.00%**

INDIA

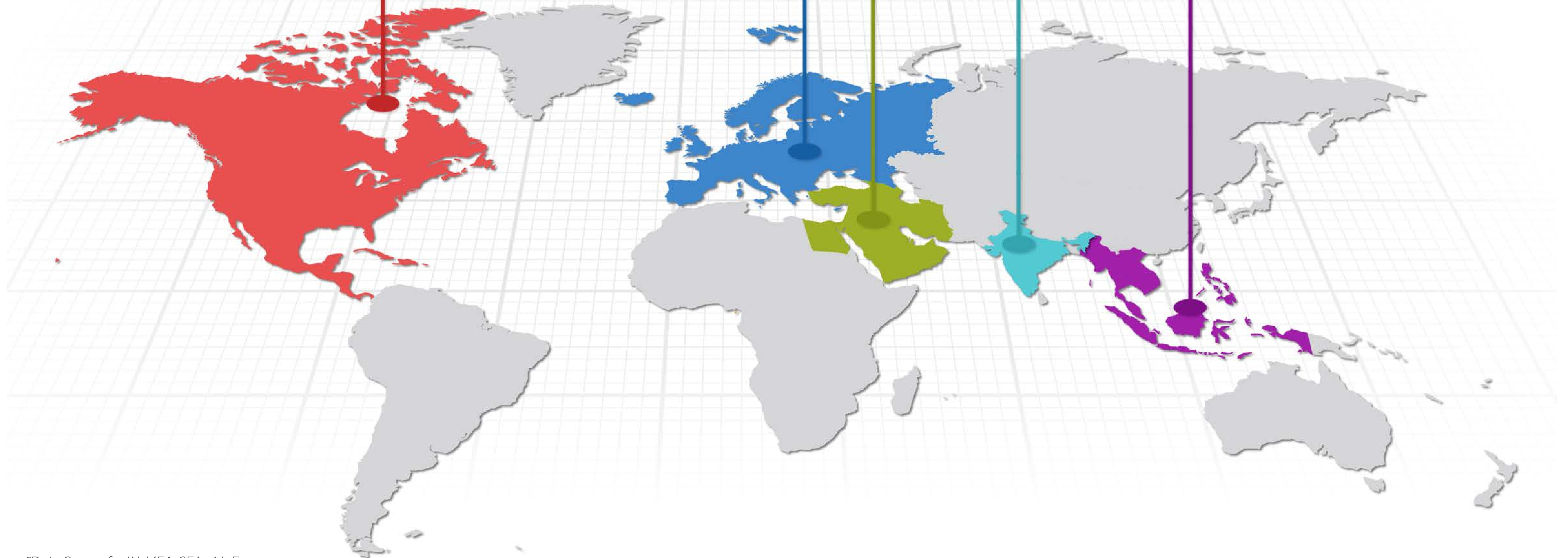
Downloads **-22.00%**
DAU **3.00%**

EUROPE

Downloads **-33.50%**
DAU **6.20%**

SOUTH EAST ASIA

Downloads **-25.00%**
DAU **-20.00%**



*Data Source for IN, MEA, SEA - MoEngage
*Data Source for NA, EU - Apptopia

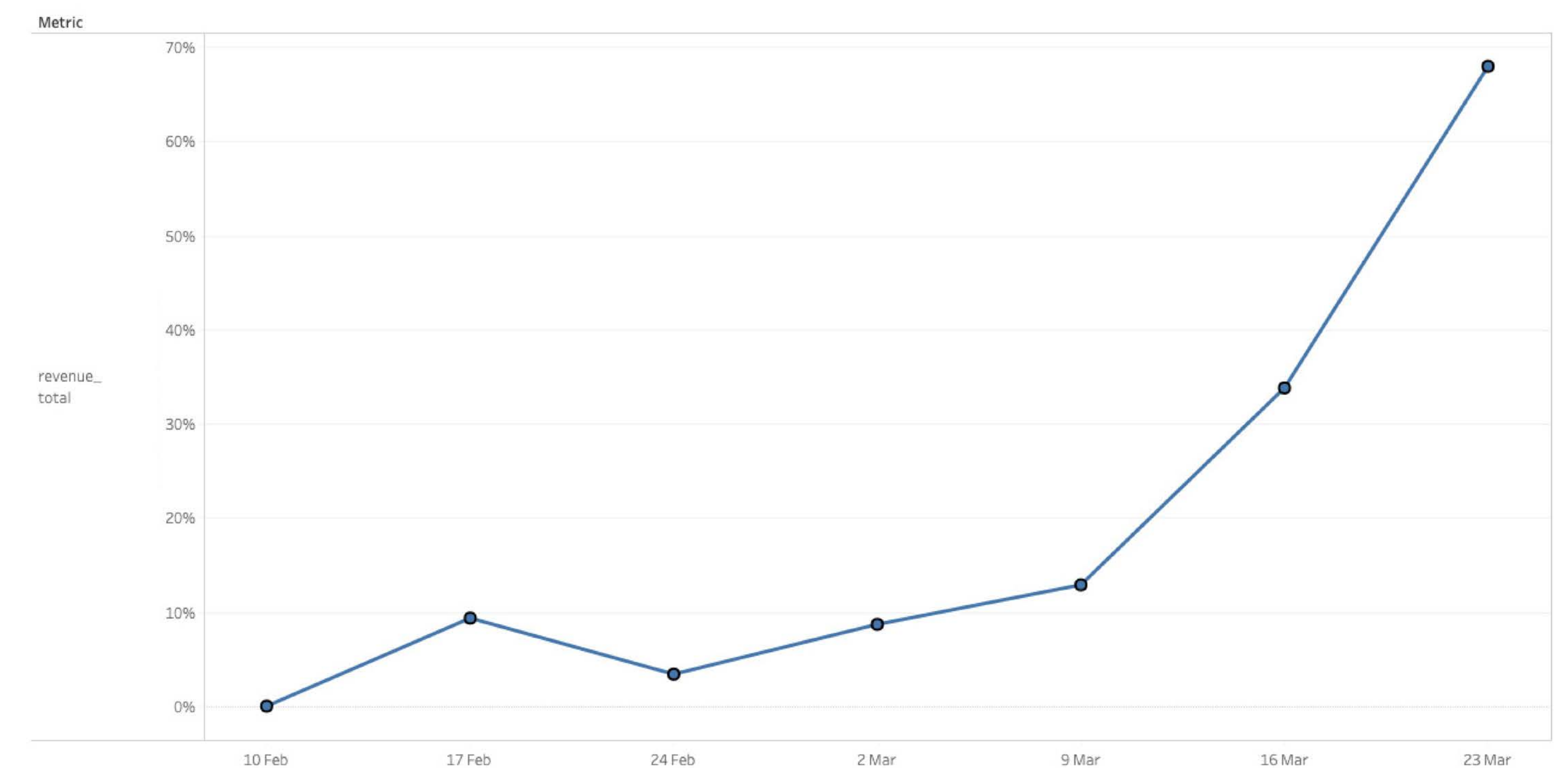
Data collected for March 2020



Fintech apps in India have seen a **steady increase** in active users since January 2020, with a huge surge in the last week of March.



There is a **steep increase** in spending on BFSI apps in India in the month of March 2020.



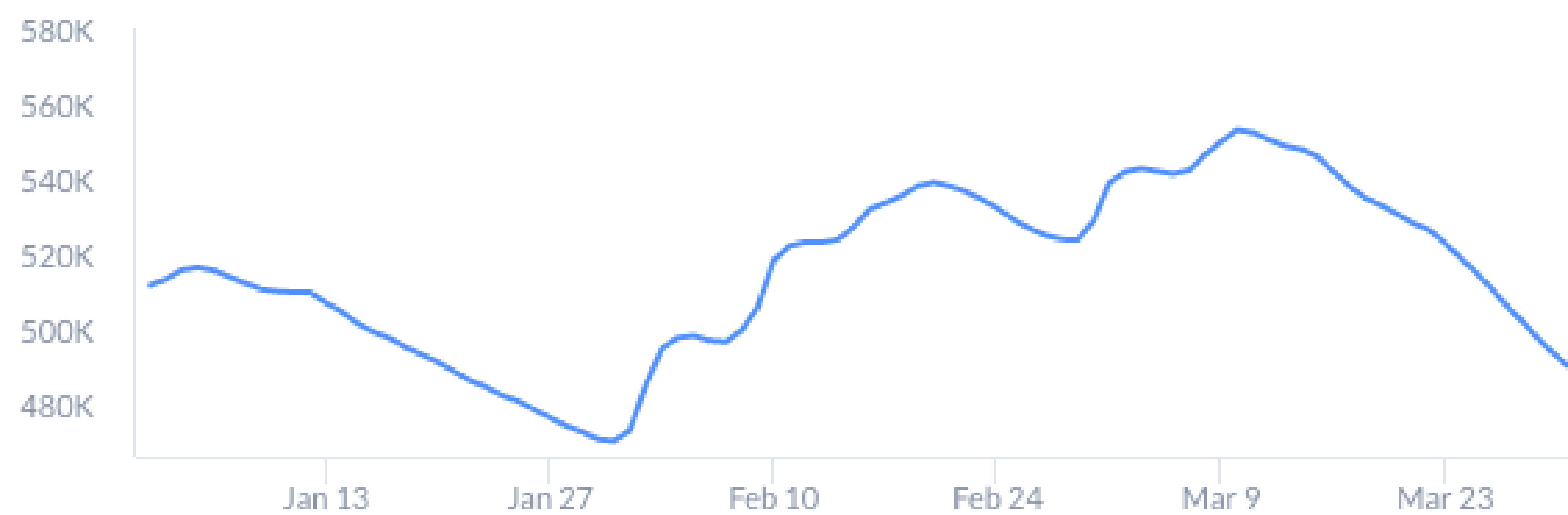
Increase in spends from February 2020 to March 2020 in India

We predict that this trend will continue in India during the 3 week mandatory shutdown of non-essential services from the last week of March till mid-April.

INDIA

OBSERVATIONS

Online banking apps in India saw a **surge** in active users in the month of February 2020. However, the number plummeted in March.

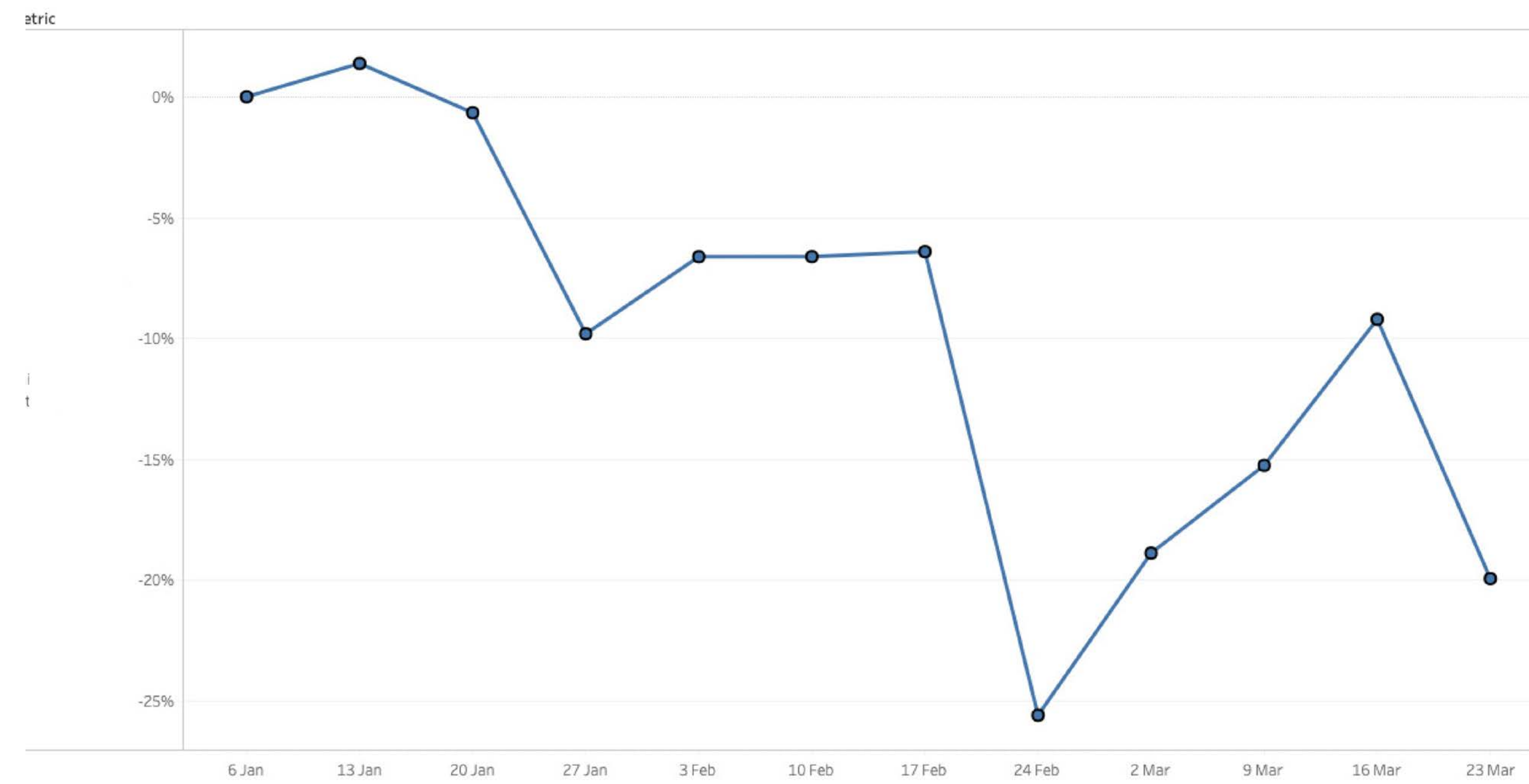


Active users varying from January 2020 to March 2020 in India

SOUTHEAST ASIA

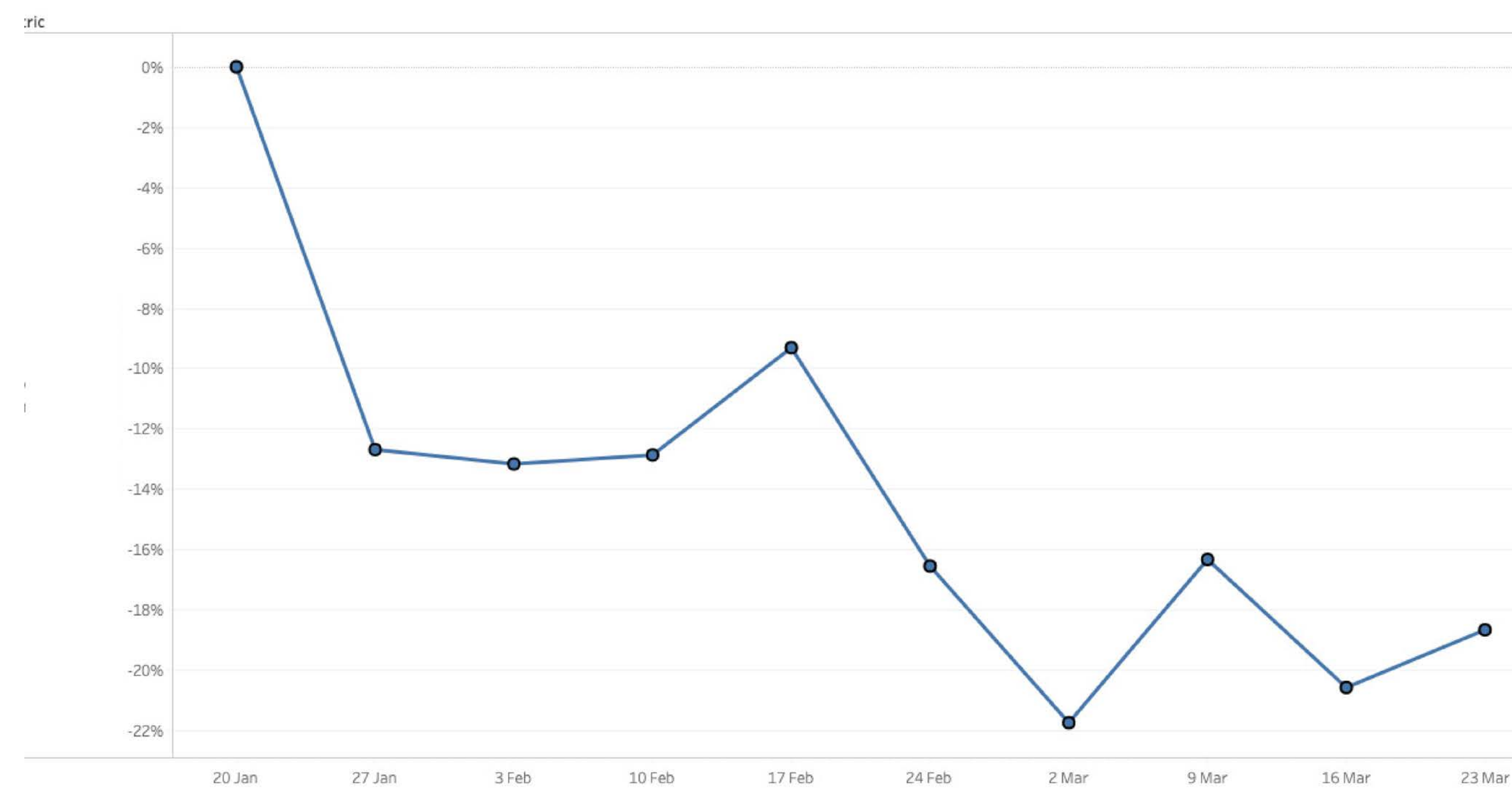
OBSERVATIONS

It is interesting to see how differently BFSI in Southeast Asia has reacted to COVID-19 compared to India. Online banks and fintech apps have seen a **decrease** in active users from January 2020 to March 2020.



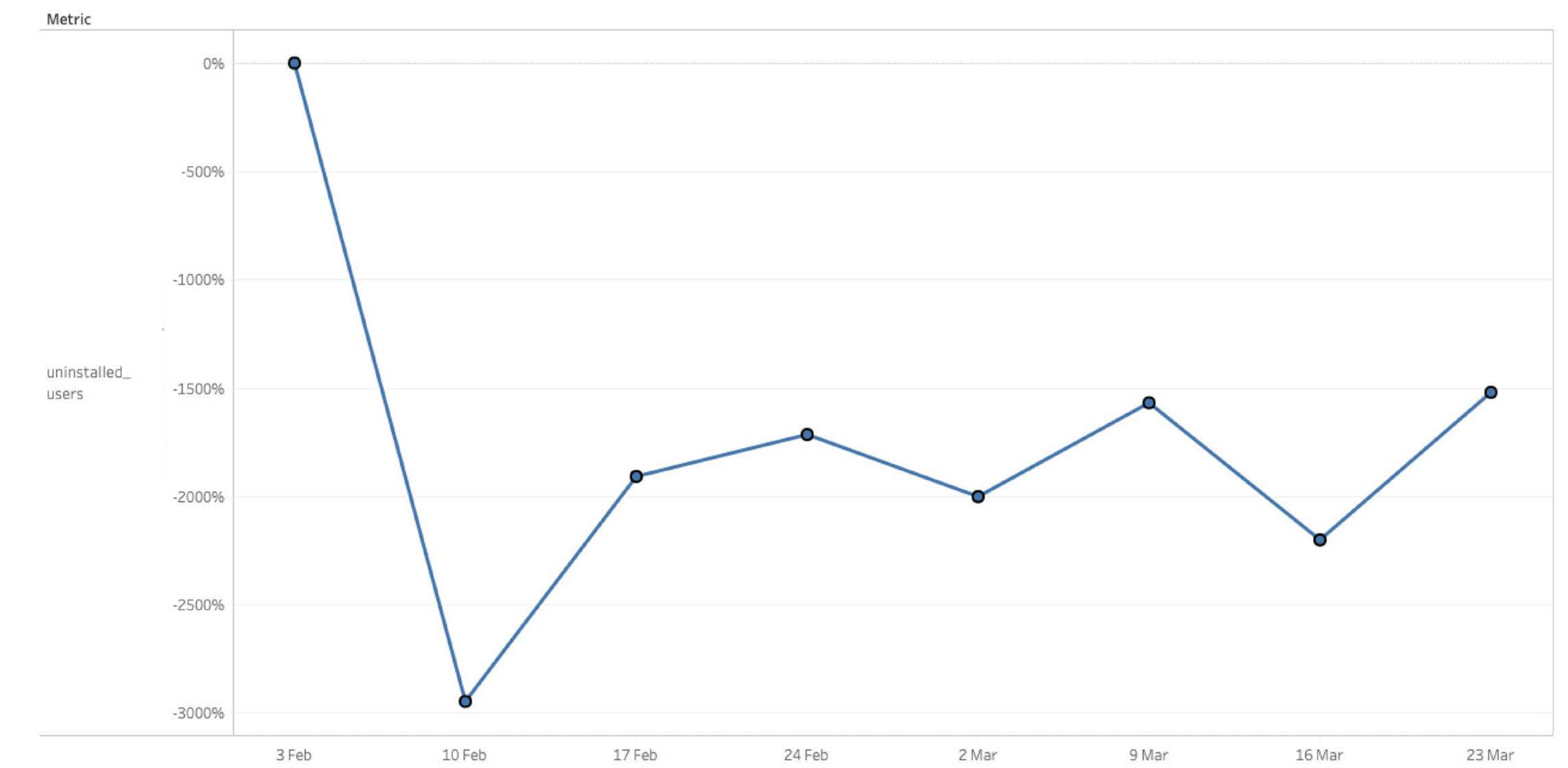
Decrease in active users from January 2020 to March 2020 in Southeast Asia

When it comes to conversion rates, users in Southeast Asia once again show a different trend than Indian users – there is a **gradual decline** in the conversion rates from January 2020 to March 2020.



Decrease in conversion rates from January 2020 to March 2020 in Southeast Asia

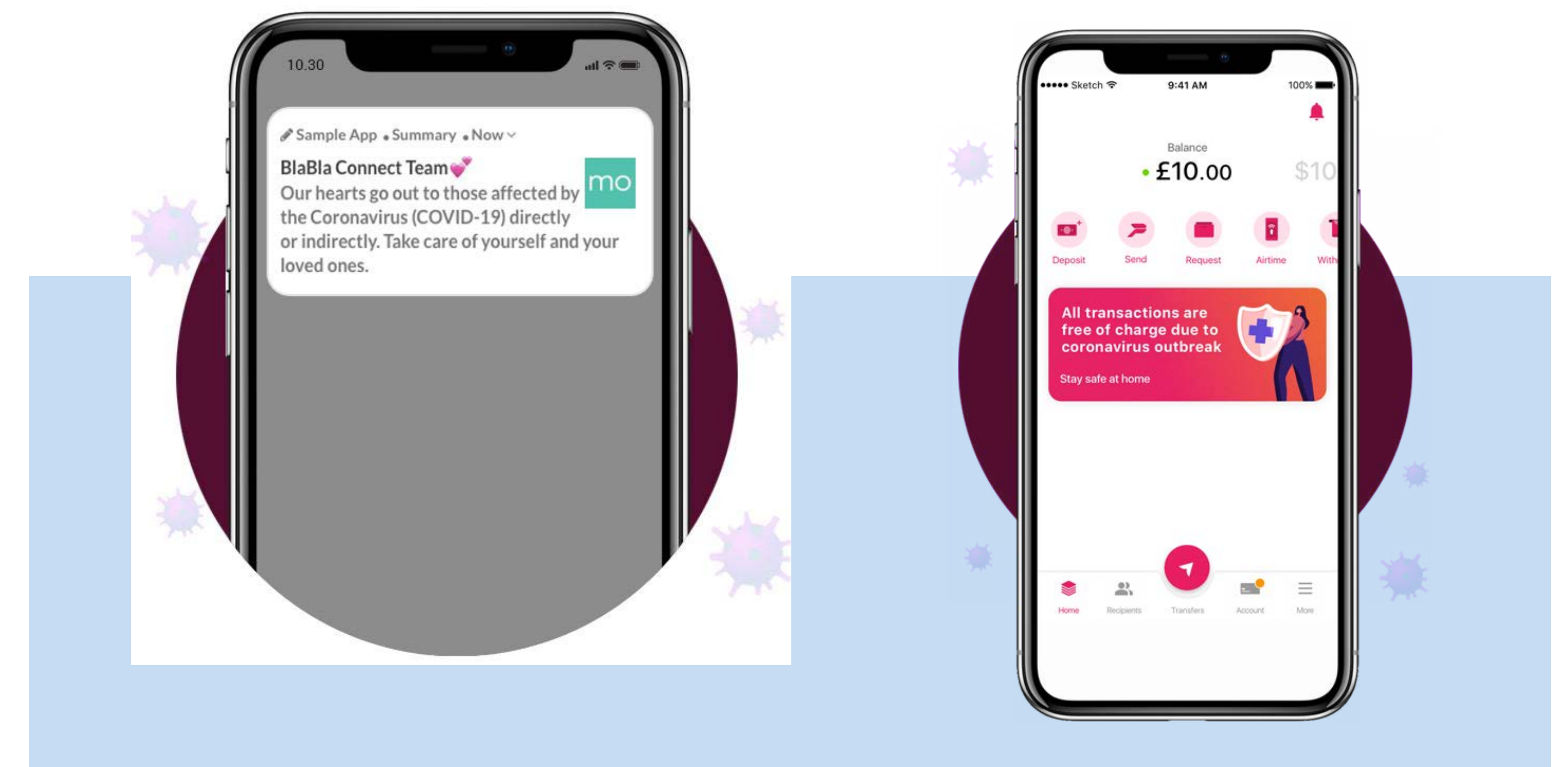
However, on the bright side, there has been a **decline** in uninstall rates for BFSI apps in Southeast Asia.



Decrease in uninstalled users from January 2020 to March 2020 in Southeast Asia

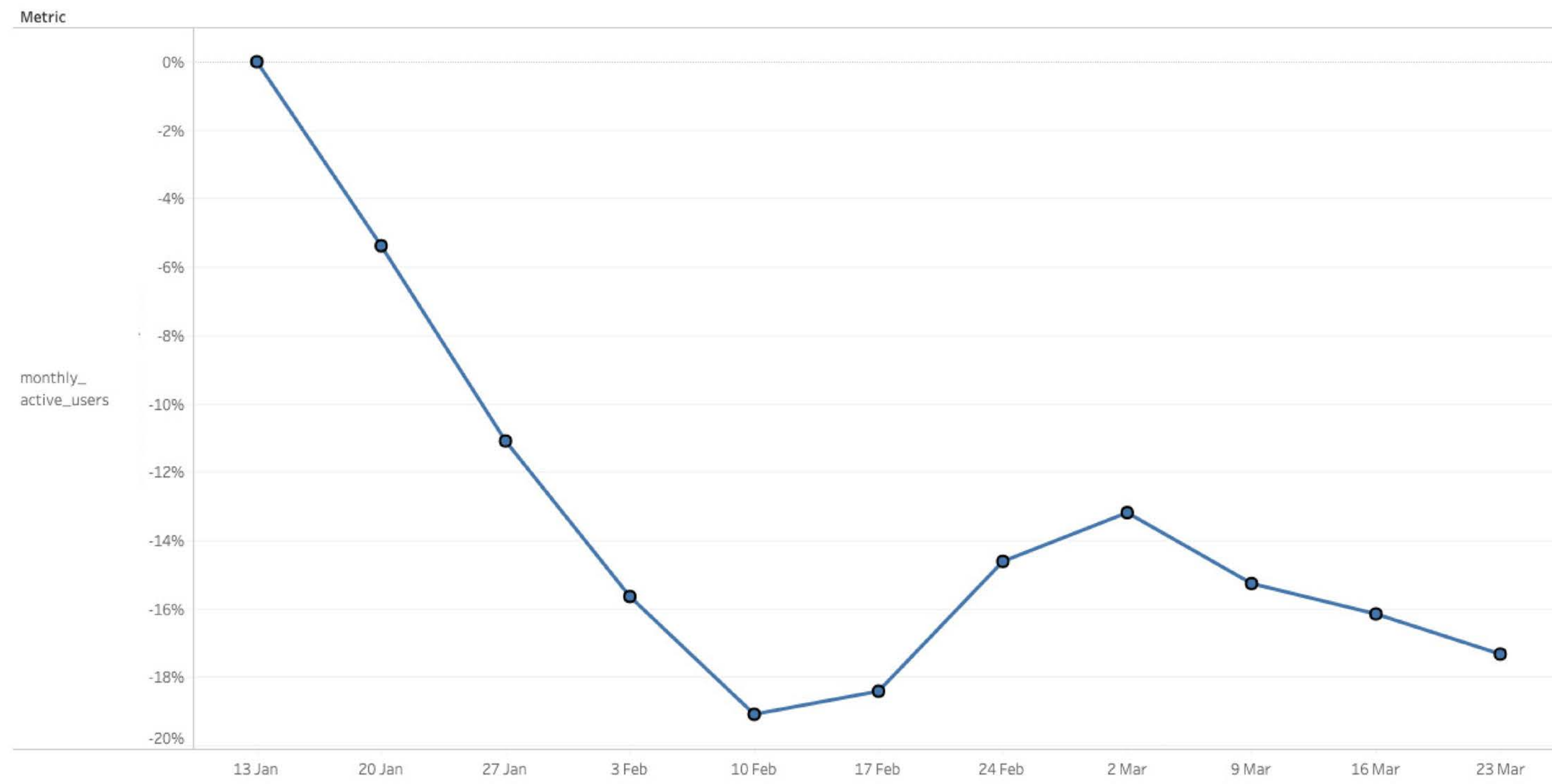
CUSTOMER STORIES

BlaBla Connect, an international calling app, is sending safety messages to its user base of more than **1 million users**.



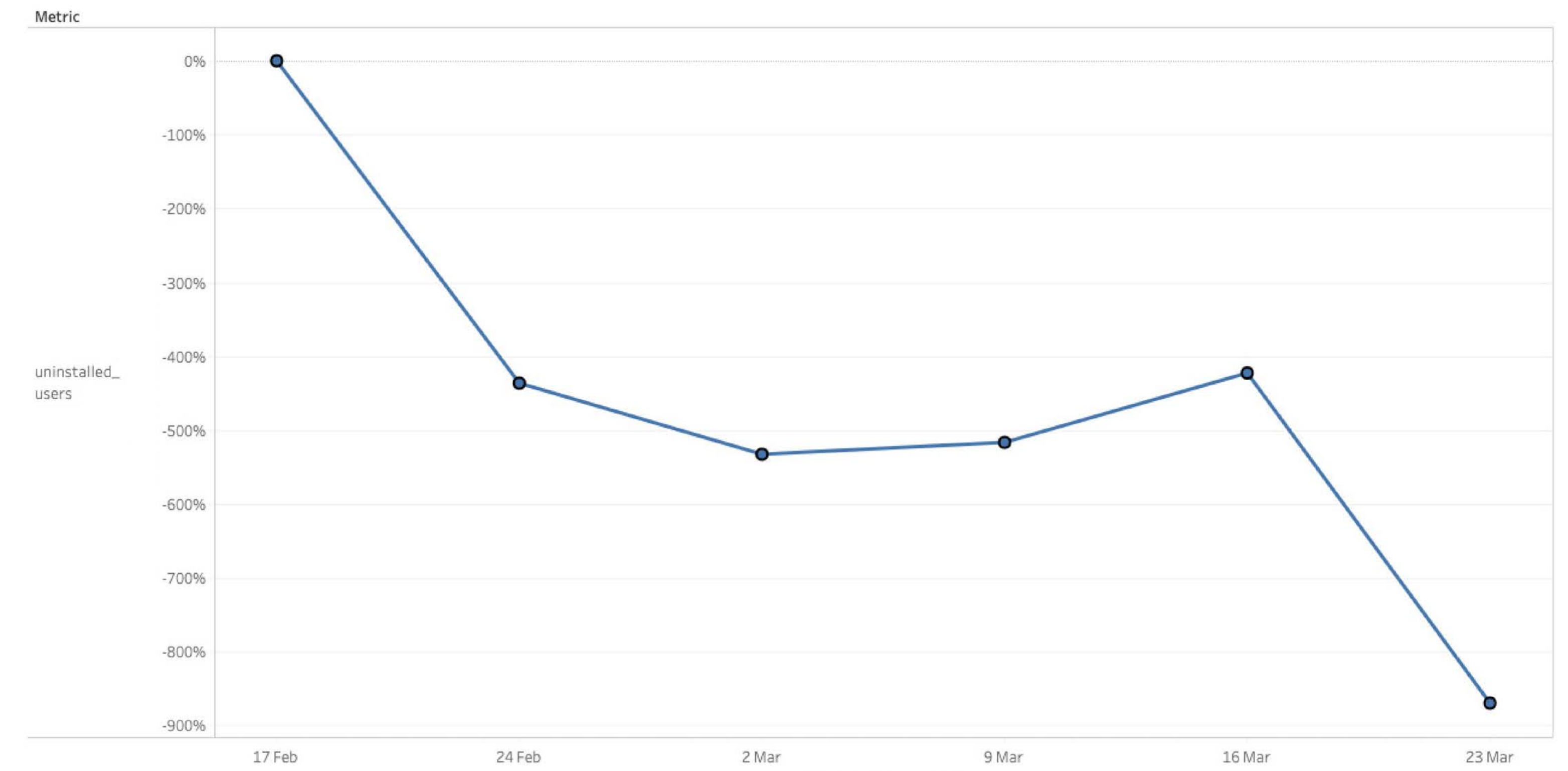
OBSERVATIONS

BFSI apps in the Middle East have seen a decrease in active users from February 2020 to March 2020. This was around the time that Iran reported its first few cases and deaths, which surged in a matter of days.



Decrease in active users from January 2020 to March 2020 in the Middle East

On the positive side, there was a decrease in the number of uninstalls during this period.



Decrease in uninstalled users from February 2020 to March 2020 in the Middle East



SOCIAL MEDIA APPS

NORTH AMERICA

Downloads **-6.55%**
DAU **0.80%**

MIDDLE EAST

Downloads **-7.55%**
DAU **3.25%**

INDIA

Downloads **-22.85%**
DAU **2.15%**

EUROPE

Downloads **-12.45%**
DAU **1.15%**

SOUTH EAST ASIA

Downloads **1.40%**
DAU **0.85%**



*Data Source Apptopia

Data collected for March 2020



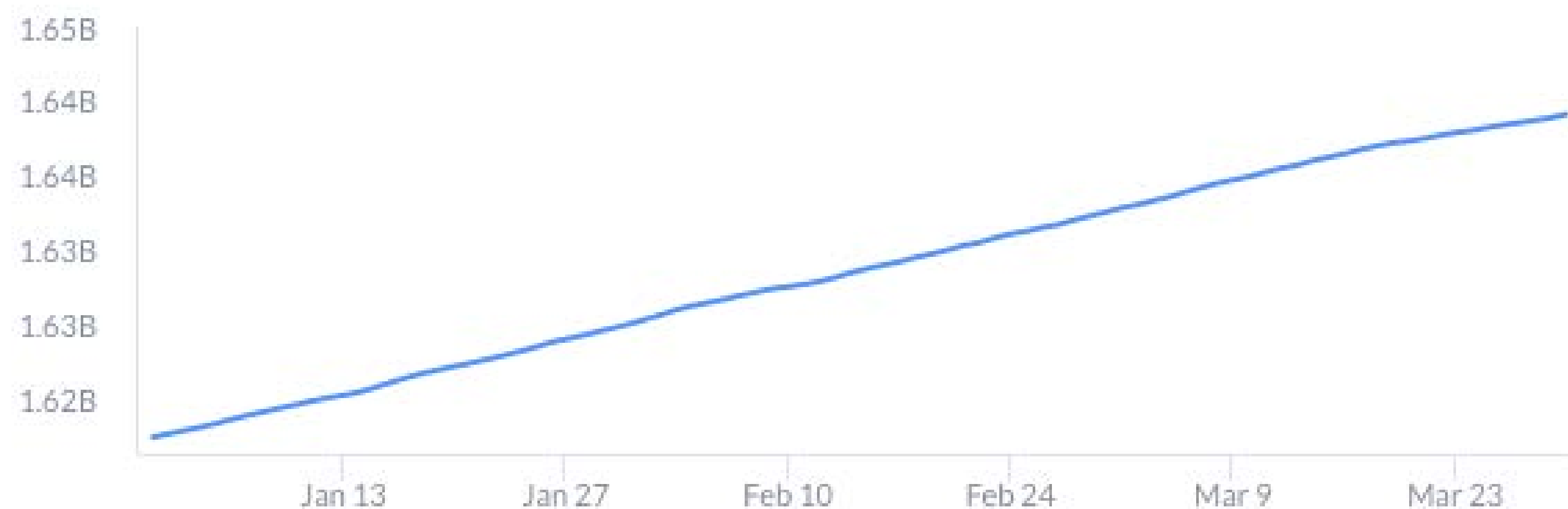
WORLDWIDE TRENDS

Though downloads of the top 5 global social media apps (WhatsApp, Facebook, Instagram, Twitter, Snapchat) have taken a hit, there is **no stopping the upward trend in DAU**.

What does that mean? While app downloads is not really a parameter of success for well known social media apps, the DAU data clearly indicates that more of us are logging into our accounts on a daily basis. Key drivers for most of these apps have been India, the United States, Brazil and China

DAU DATA FOR FACEBOOK (LAST 90 DAYS)

DAU
Last 90 Days



Key geographies driving growth in DAU for Facebook with data for last 90

INDIA

34 million, +1.5%

UNITED STATES

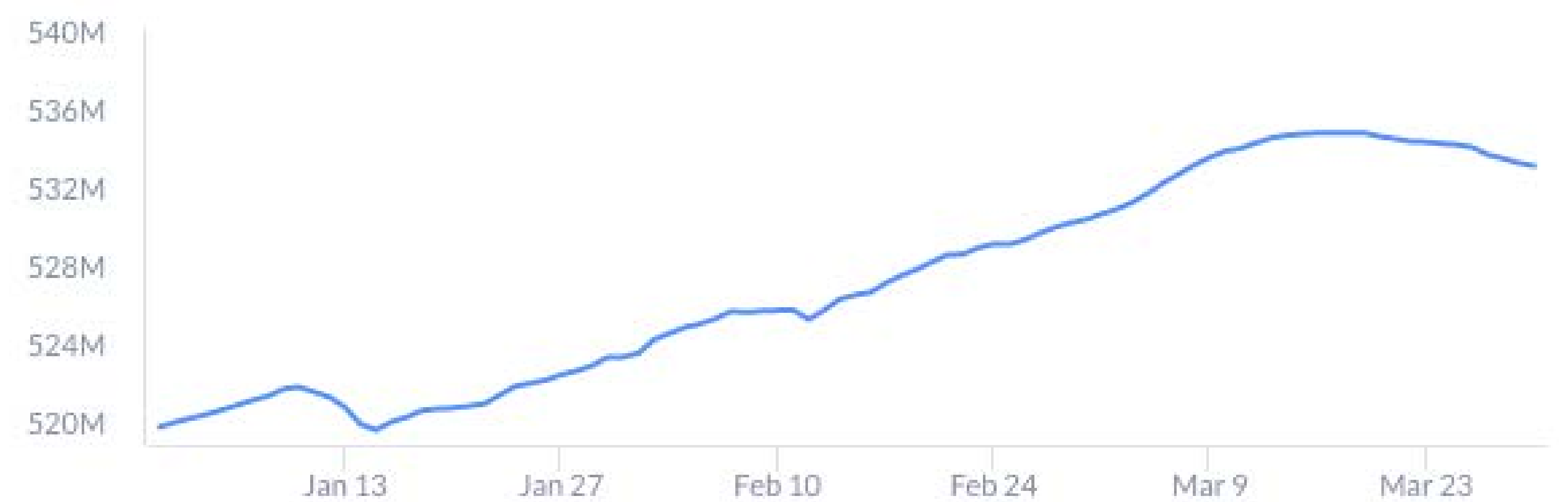
195 million, +1.7%

BRAZIL

162 million, +1.5%

DAU DATA FOR WHATSAPP (LAST 90 DAYS)

DAU
Last 90 Days



Key geographies driving growth in DAU for WhatsApp with data for last 90

INDIA

150.3 million, +4.5%

INDONESIA

58.3 million, +4.3%

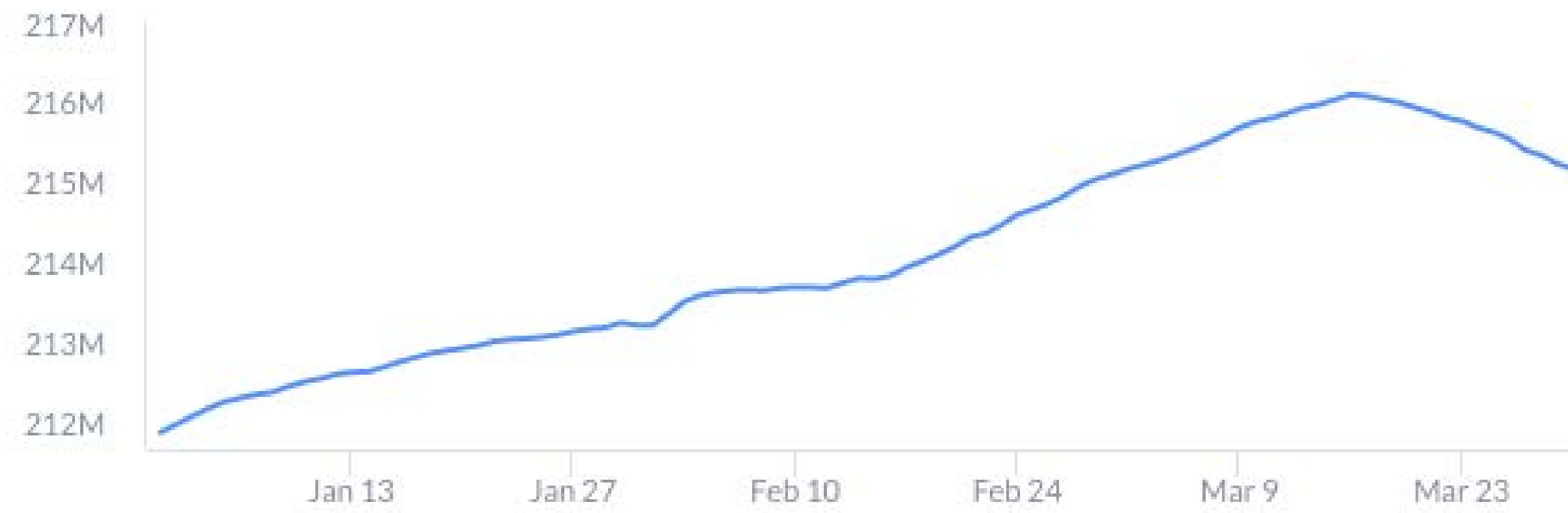
BRAZIL

64.4 million, +3.8%

DAU DATA FOR SNAPCHAT (LAST 90 DAYS)

DAU ▾

Last 90 Days



Key geographies driving growth in DAU for Snapchat with data for last 90

INDIA

15 million, +8.7%

UNITED STATES

51 million, +1.9%

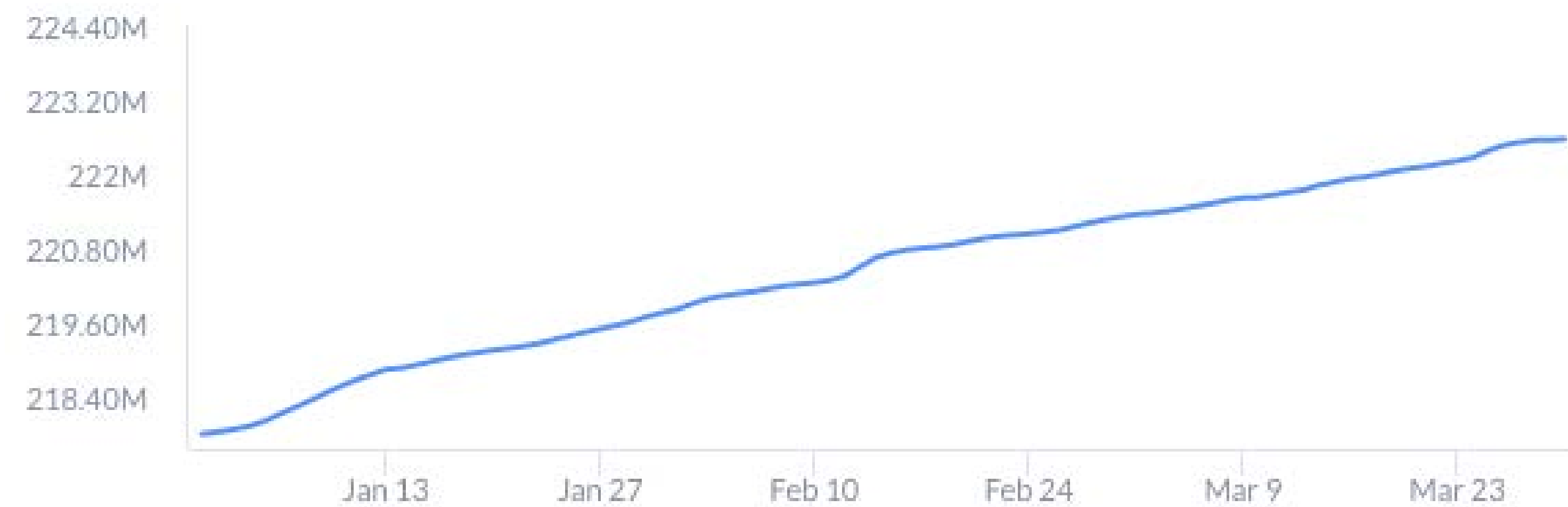
MEXICO

11.5 million, +3.6%

DAU DATA FOR TWITTER (LAST 90 DAYS)

DAU ▾

Last 90 Days



Key geographies driving growth in DAU for Twitter with data for last 90

INDIA

30.2 million, +2%

UNITED STATES

38.5 million, +1.5%

BRAZIL

14.7 million, +2%

DAU DATA FOR INSTAGRAM (LAST 90 DAYS)

DAU ▾

Last 90 Days



Key geographies driving growth in DAU for Instagram with data for last 90

INDIA

90.2 million, +7.3%

UNITED STATES

127.4 million, +3.6%

BRAZIL

100.9 million, +4%

SOUTHEAST ASIA

WECHAT'S JOURNEY TO THE TOP

There is no denying the reach of WeChat in the Republic of China, but what's interesting is WeChat's market share in other geographies such as the United States and India. The app also has strong numbers in Southeast Asia.

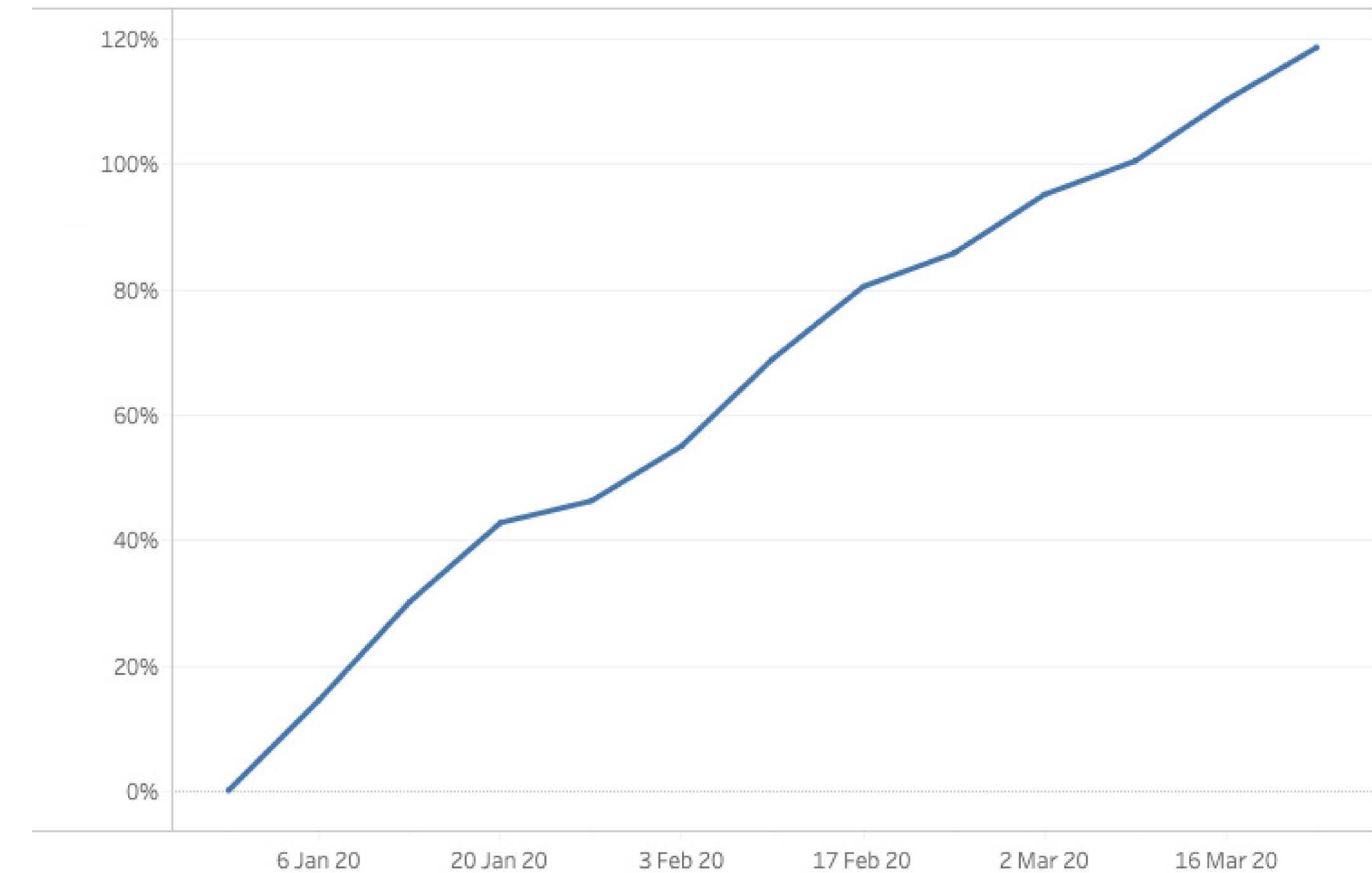
Here are they key growth drivers (in terms of geography) for DAU in the last 90 days:

| | | |
|---------------------|----------------------|---------------------|
| CHINA | UNITED STATES | MALAYSIA |
| 195.8 million, +2% | 18.7 million, +1.5% | 40.3 million, +0.7% |
| TAIWAN | INDIA | |
| 10.1 million, +2.2% | 69 million, +0.4% | |

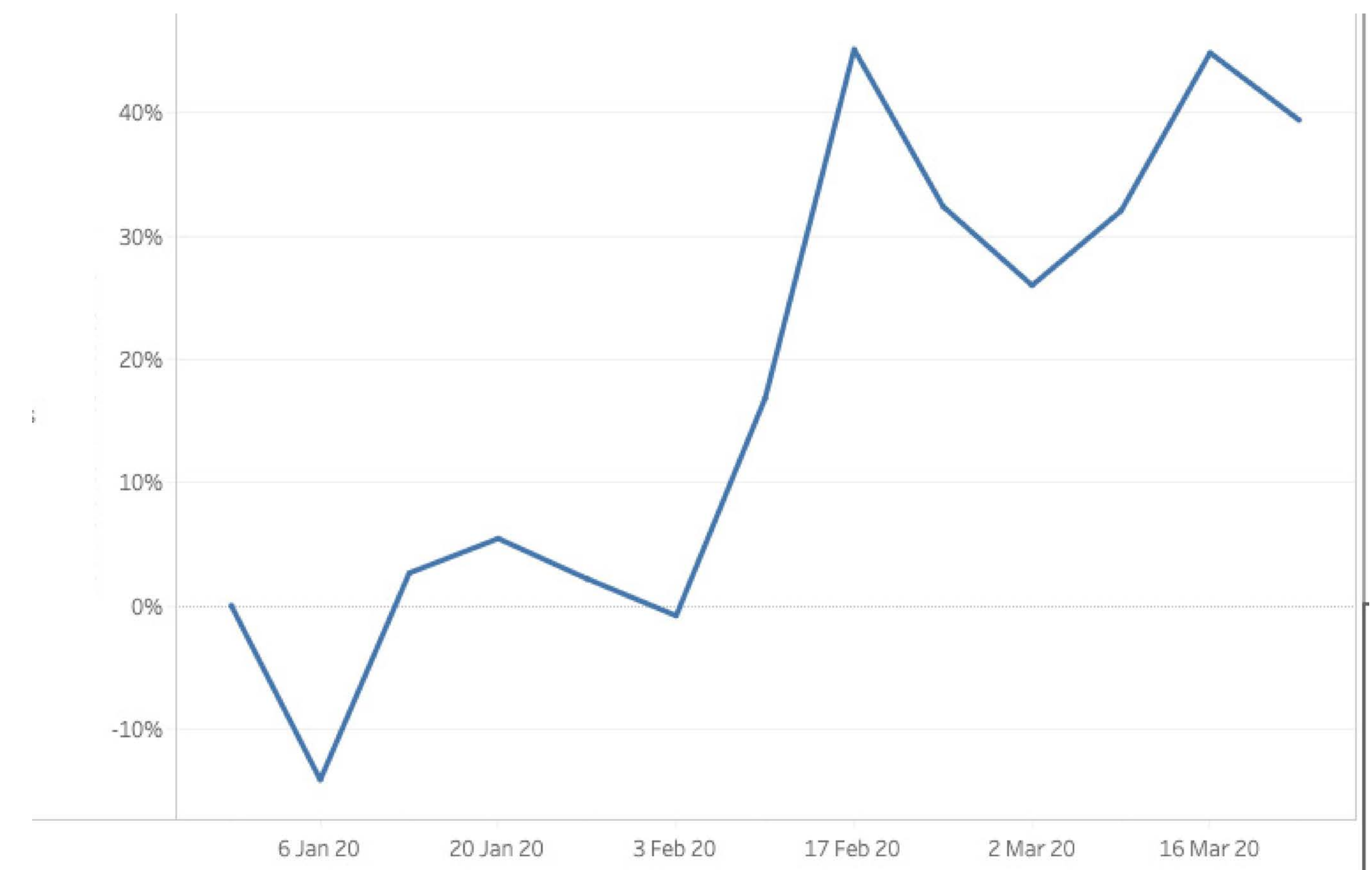


INDIA

HOMEGROWN SOCIAL MEDIA APPS SEE RECORD GROWTH



DAU for users in India (last 90 days) - overall growth of +120%



New app downloads for users in India (last 90 days) - overall growth of +40%



MOBILITY

NORTH AMERICA

Downloads **-13.80%**
DAU **0.90%**

MIDDLE EAST

Downloads **-12.00%**
DAU **-3.05%**

INDIA

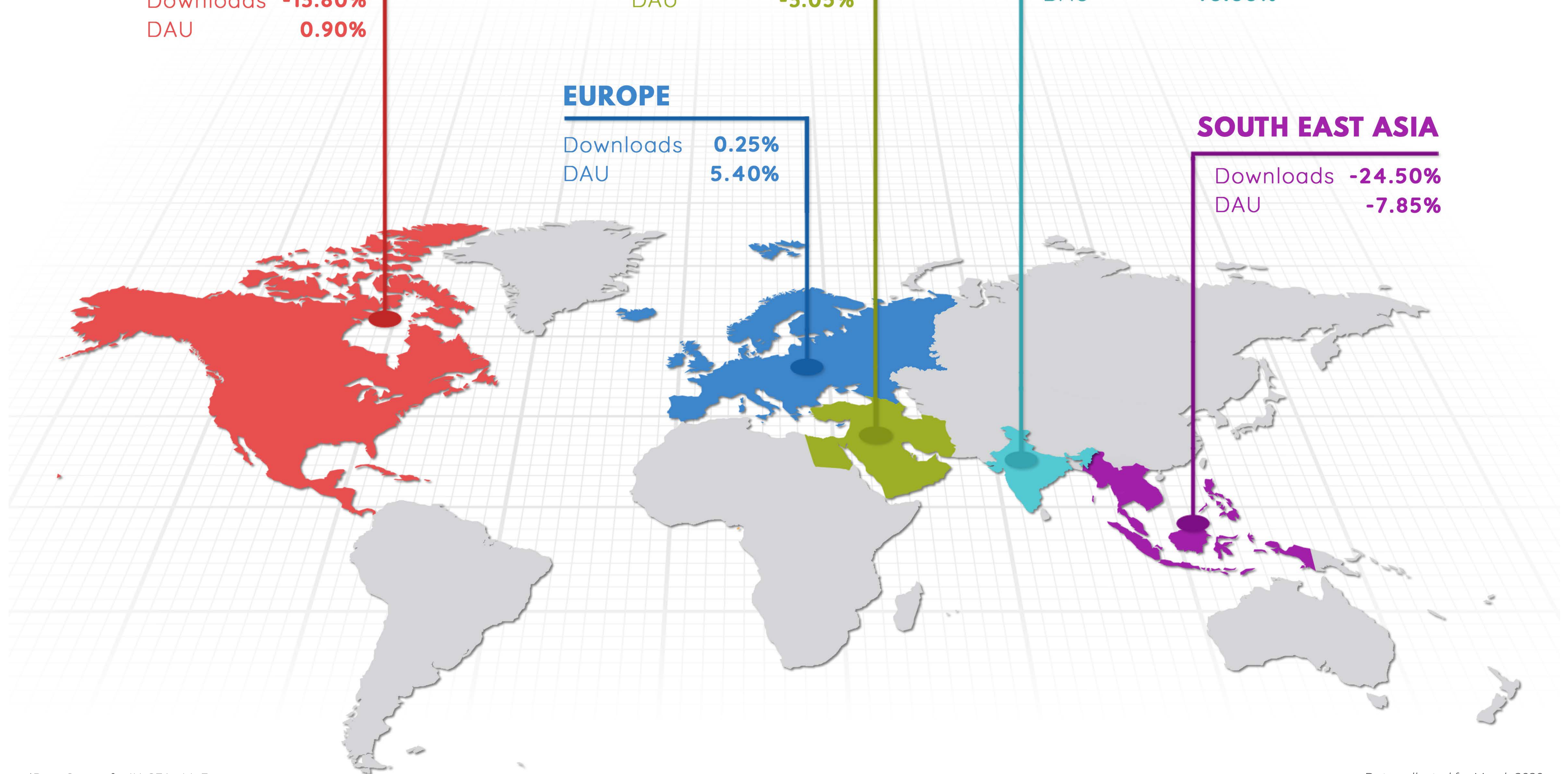
Downloads **-80.05%**
DAU **-40.00%**

EUROPE

Downloads **0.25%**
DAU **5.40%**

SOUTH EAST ASIA

Downloads **-24.50%**
DAU **-7.85%**



*Data Source for IN, SEA - MoEngage
*Data Source for NA, EU, MEA - Apptopia

Data collected for March 2020
Sub-verticals - Ride-hailing cabs, vehicle rental apps



Here are the **key geographies that see a drop in DAU:**

| | | |
|----------------------|---------------------|-----------------|
| UNITED STATES | BRAZIL | INDIA |
| 2.5 million, -7.7% | 1.4 million, -27.2% | 948,500, -14.7% |

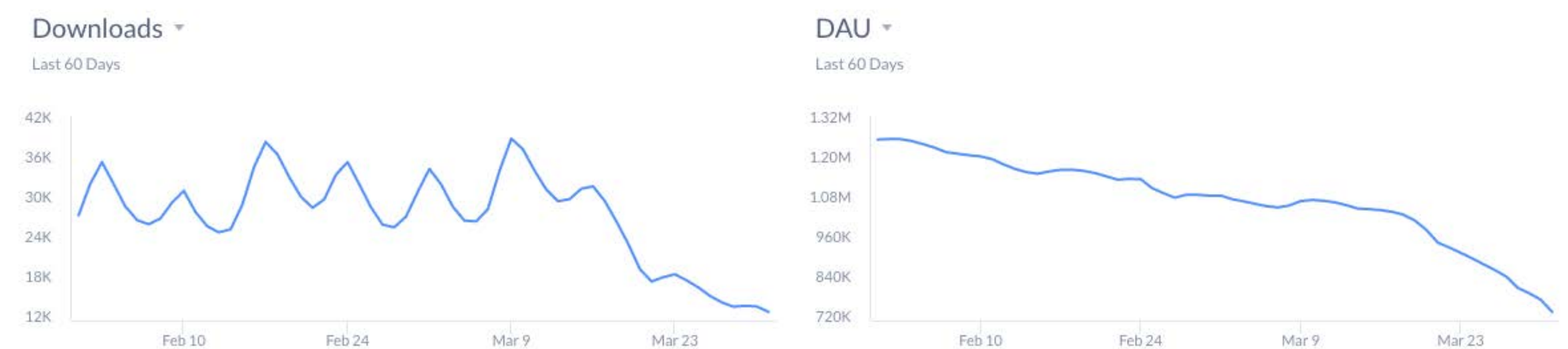


Lyft downloads and DAU data for the last 90 days

Similar to Uber, Lyft sees an upward trend in DAU in late February owing to 'social distancing' policies. There is a swift decline in March due to lockdowns and mandatory work-from-home policies in large parts of the world.

Key geographies that contribute to the drop in DAU:

| | | |
|----------------------|-----------------|---------------|
| UNITED STATES | CANADA | CHINA |
| 3.7 million, -5.6% | 163,100, -18.5% | 65,700, -8.8% |



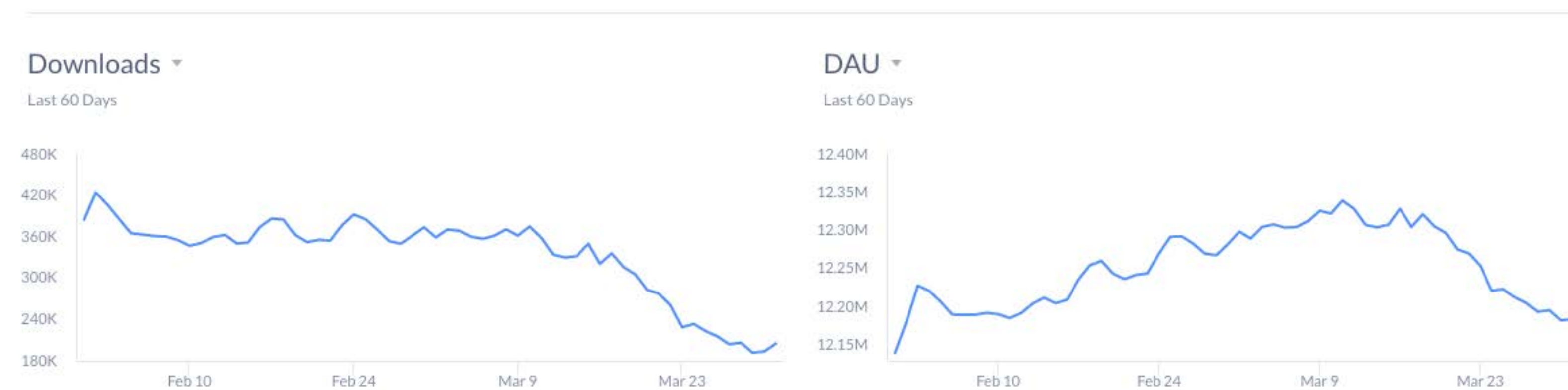
Lime downloads and DAU data for the last 90 days

Lime, with primary markets in the United States and the EU, has been hit hard as well. With ride options such as e-scooters, bikes and cars, the mobility giant follows the industry trend as all its key geographies report drops both in downloads and DAU (see data below):

| | | |
|----------------------------|----------------------------|----------------------------|
| UNITED STATES | GERMANY | FRANCE |
| Downloads: 341,000, -22.8% | Downloads: 181,000, -31.9% | Downloads: 102,200, -56.7% |
| DAU: 250,800, -34.7% | DAU: 158,900, -36.5% | DAU: 81,500, -34.8% |

WORLDWIDE TRENDS

One of the worst hit industries after Travel & Hospitality is Mobility. With governments worldwide issuing lockdown orders, the industry is facing a tough time.



Uber's downloads and DAU data for the last 90 days

The data trend for mobility apps is closely based on policies adopted by governments in response to COVID-19.

When cases of COVID-19 were first reported globally in late February and early March, you can see a bump in the DAU graph. This can be clearly associated with 'social distancing' policies initiated by governments worldwide. Such policies favored personal commute to the workplace over public transport.

We see an immediate drop from this growth in mid to late March as governments announced more drastic measures such as lockdowns and industries moved to a mandatory 'work from home' policy.

DID YOU KNOW?

Lime has seen **positive growth in only one geography worldwide - South Korea**. With no lockdowns here and the government trying alternate means to contain and mitigate the situation, Koreans moved to self-driven scooters, bikes, and cars from Lime in large numbers. With the Korean healthcare system introducing policies such as 'drive-through-checks' for COVID-19 screening, we have a hunch that the numbers will continue to grow. This also increases Lime's responsibility to ensure prompt sanitization of the vehicles.



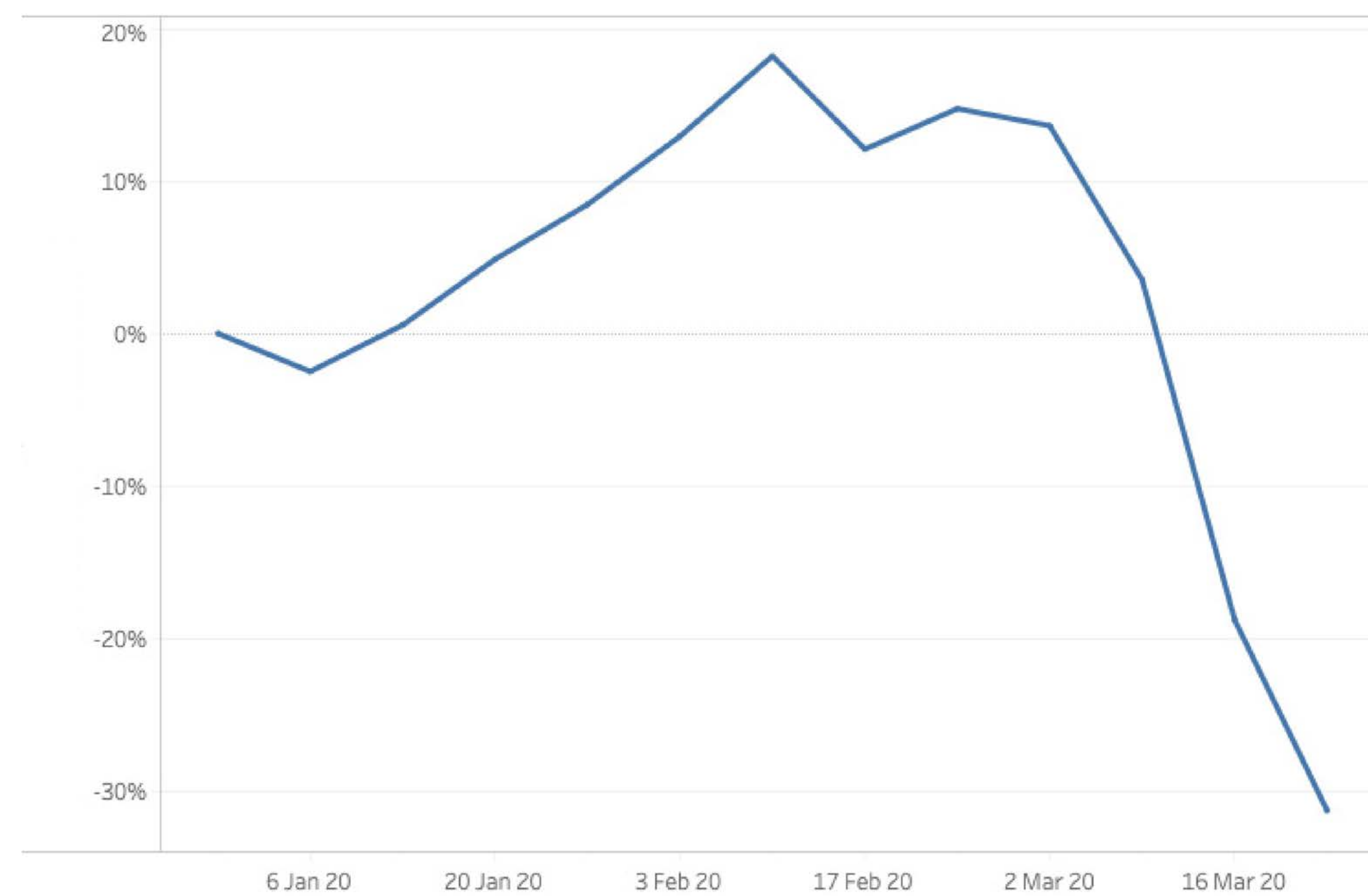
Lime in Korea - data for last 60 days

Downloads: 213,500, +26%

DAU: 88,600, +24%

INDIA

Govt backed lockdown in India hits the industry hard



Combined drop of 30% in DAU in the last 90 days for mobility apps in India



Combined drop of 90% in new users in the last 90 days for mobility apps in India

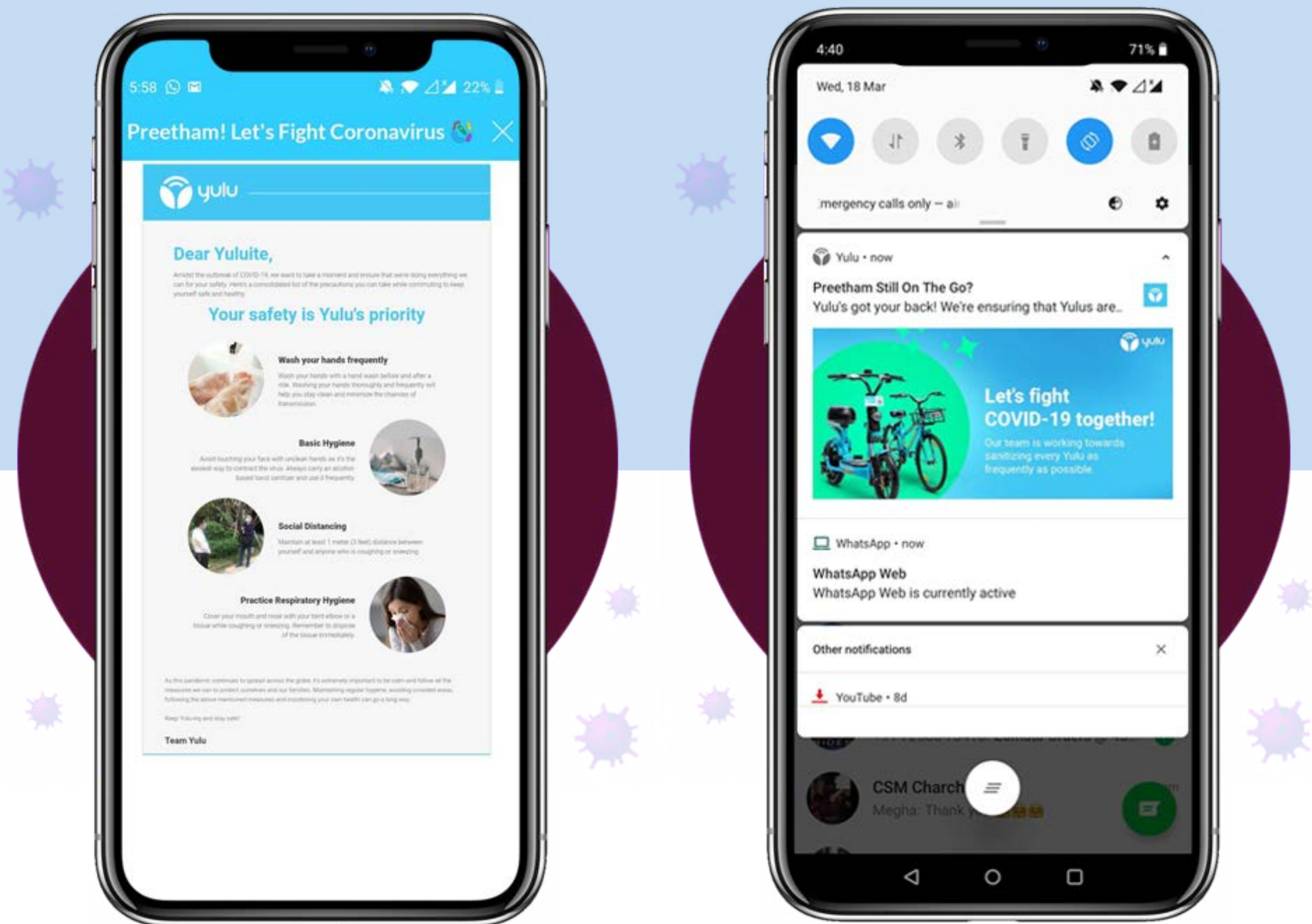


Combined fall of 80% in confirmed rides in the last 90 days for mobility apps in India



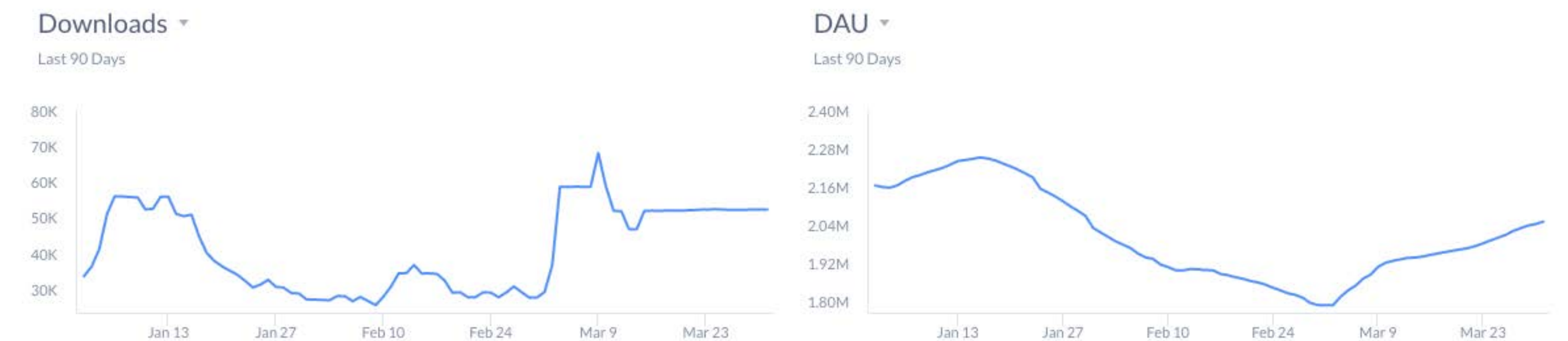
Brands that offer public commuting solutions like renting services for cars, two-wheelers, and electronic vehicles are ensuring the safety of their users by keeping their vehicles and spaces clean and hygienic. One such example is Yulu, an Indian brand that offers shared micro-mobility services across urban India.

During this pandemic, Yulu is running an awareness campaign by reaching out to more than 1 million users in India informing them about the safety measures taken by their team. They use push notifications to highlight how the Yulu team cleans and maintains safety protocols for their vehicles. Apart from vehicles, the team is also regularly cleaning all Yulu Zones – spaces where these vehicles are stored for easy access.



CHINA

Didi, China's Uber returns to normalcy with the lifting of the lockdown in China



Didi, the biggest ride hailing app in China, with emerging markets in the United States, Korea, and Hong Kong, sees completely different behavior trends in each of the geographies that it operates. The trends follow the lockdown policies initiated in each place.

In China, we see an early slump in the industry around January 23, when Wuhan and other key cities were locked down for a month.

The trend for downloads and DAU shifts upwards abruptly in the first week of March as cities across China see a lifting of travel bans. As of April 1, this upward trend continues. It could change if China imposes another lockdown.

Didi's data in China over the last 30 days, post the lifting of lockdowns:

Downloads: 1.5 million, +79%

DAU: 1.9 million, +3.7%

NORTH AMERICA

Downloads **-10.00%**
DAU **-5.00%**

MIDDLE EAST

Downloads **-38.90%**
DAU **-33.90%**

INDIA

Downloads **5.00%**
DAU **51.00%**

EUROPE

Downloads **-14.50%**
DAU **-25.00%**

SOUTH EAST ASIA

Downloads **-15.00%**
DAU **-4.50%**



*Data Source for IN - MoEngage
*Data Source for NA, EU, MEA, SEA - Apptopia

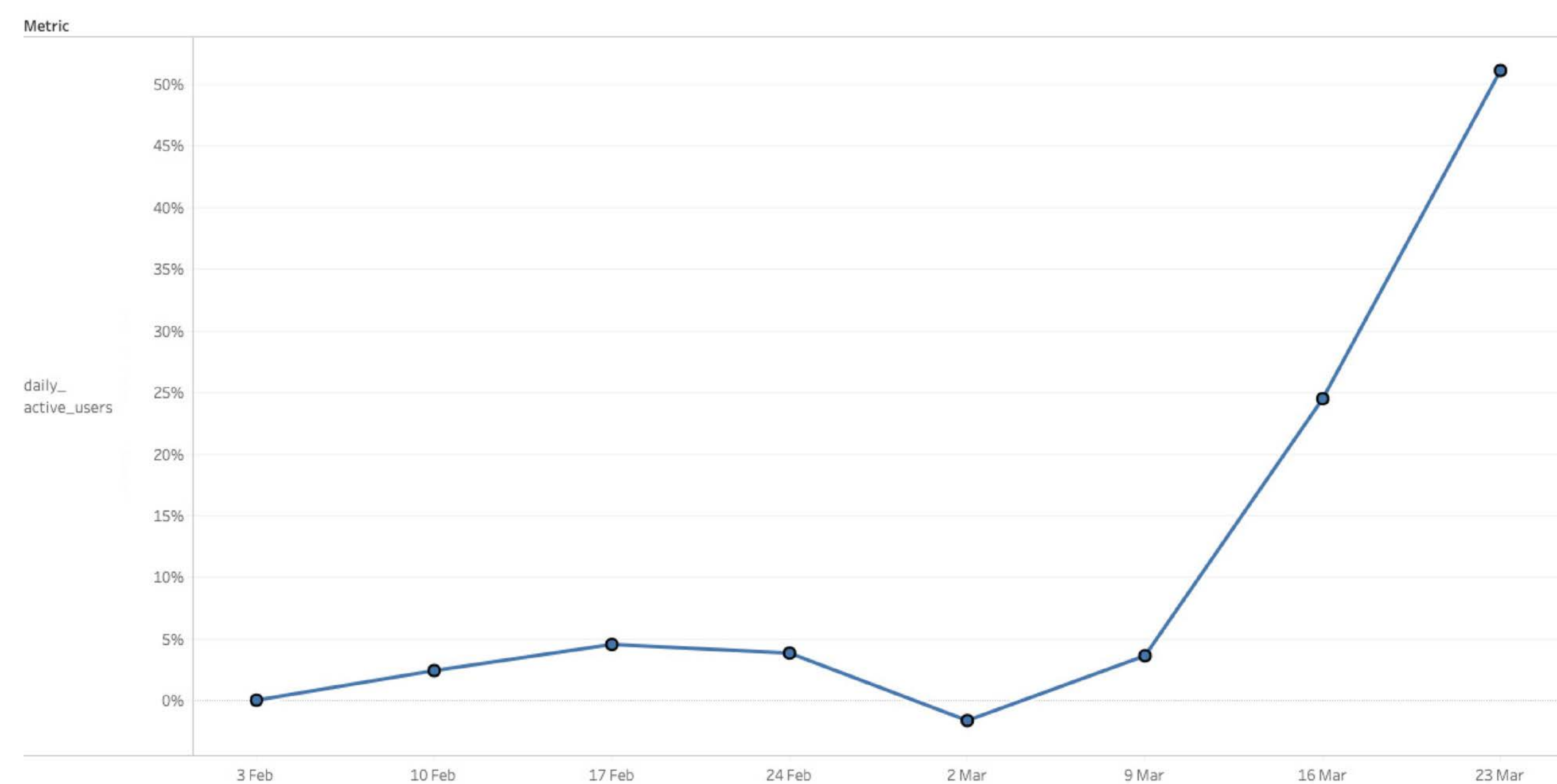
Data collected for March 2020



INDIA

Online telecommunication apps have seen a surge of over **50%** in active users in March 2020.

OBSERVATIONS

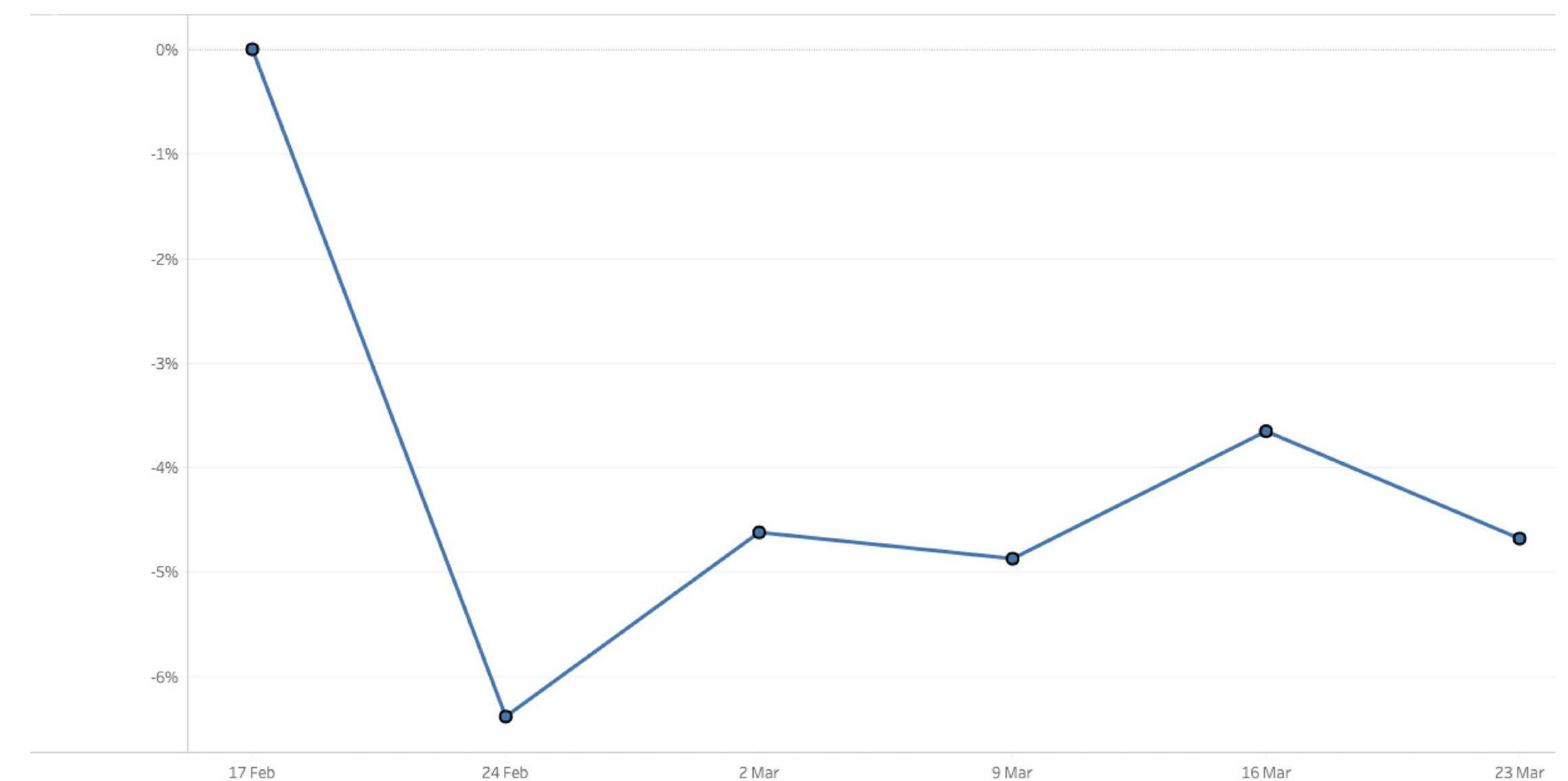


Increase in active users in March 2020 in India

Due to the government mandated safety protocols, telecom giants in India started working at a much lower capacity – fewer customer support staff and complete shutdown of all offline stores since March 2020.

WHAT SERVICES DO TELECOM APPS PROVIDE?

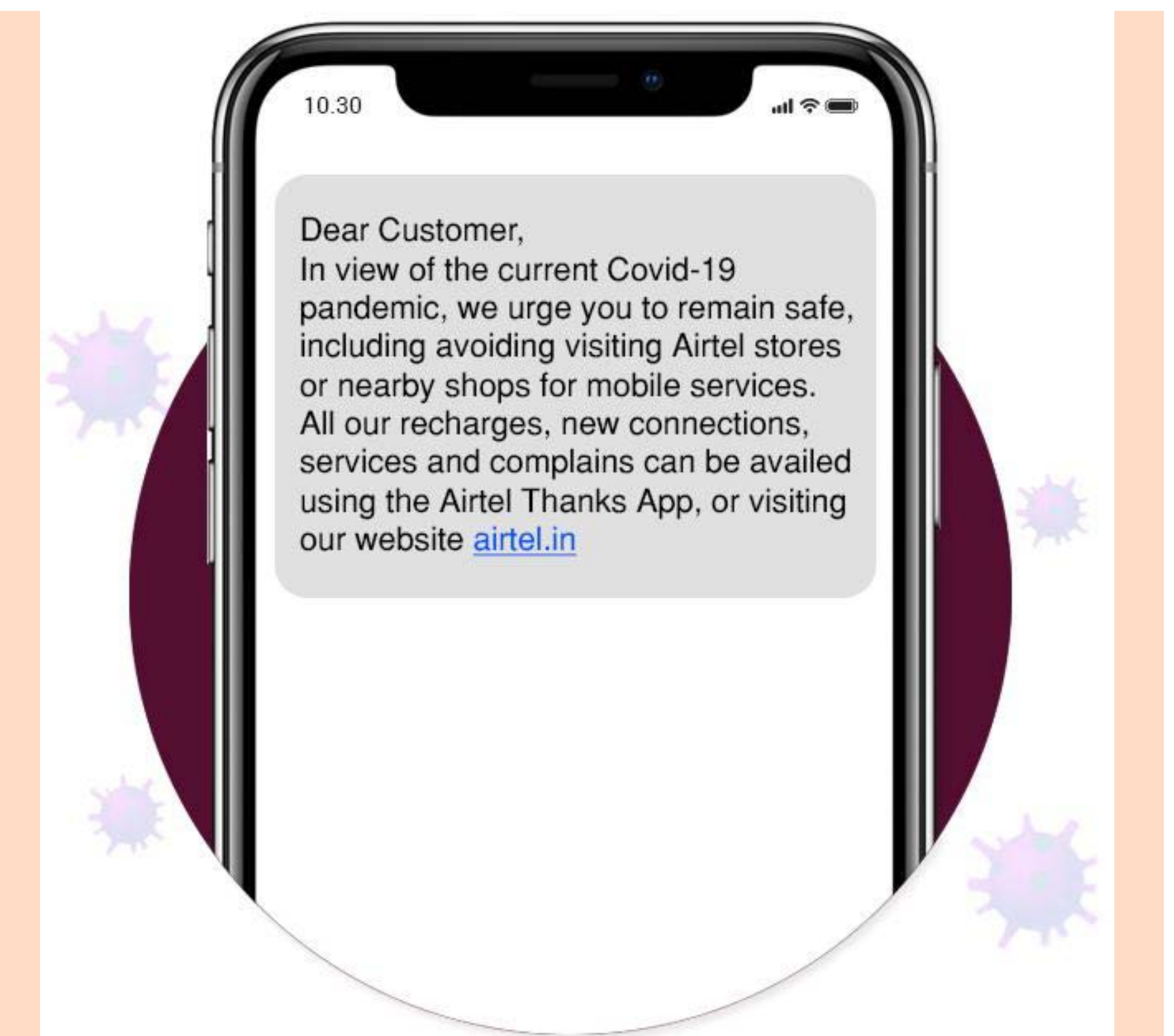
Users sign up and purchase new subscriptions for services such as phone calls, text messaging, broadband internet or cable TV. Existing customers can recharge their prepaid accounts, pay bills, upgrade plans and raise support tickets on their fingertips, without having to visit a store.



Decrease in conversion rate after February 2020 in India

BRAND STORY

Airtel, one of India's leading telecommunication service providers, caters to **144 million** subscribers every day. It has a strong offline user base that walks into 500 company owned and 1,500 franchise stores across India for payment and support. To encourage online adoption, the brand sent SMSes urging users to stay indoors and use their self-care app for bill payments, package activation, support and other services.





EDTECH

NORTH AMERICA

Downloads **76.00%**
DAU **17.50%**

MIDDLE EAST

Downloads **70.00%**
DAU **3.00%**

INDIA

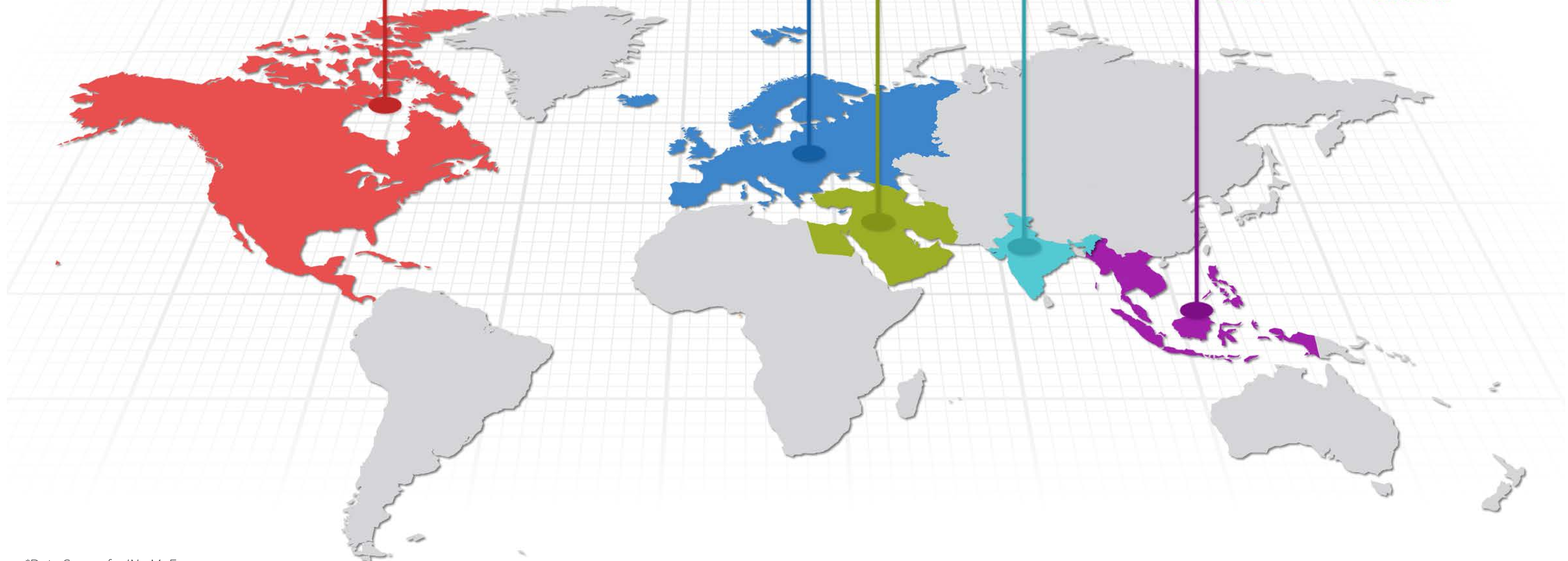
Downloads **-21.00%**
DAU **-12.70%**

EUROPE

Downloads **27.00%**
DAU **5.00%**

SOUTH EAST ASIA

Downloads **270.00%**
DAU **51.00%**

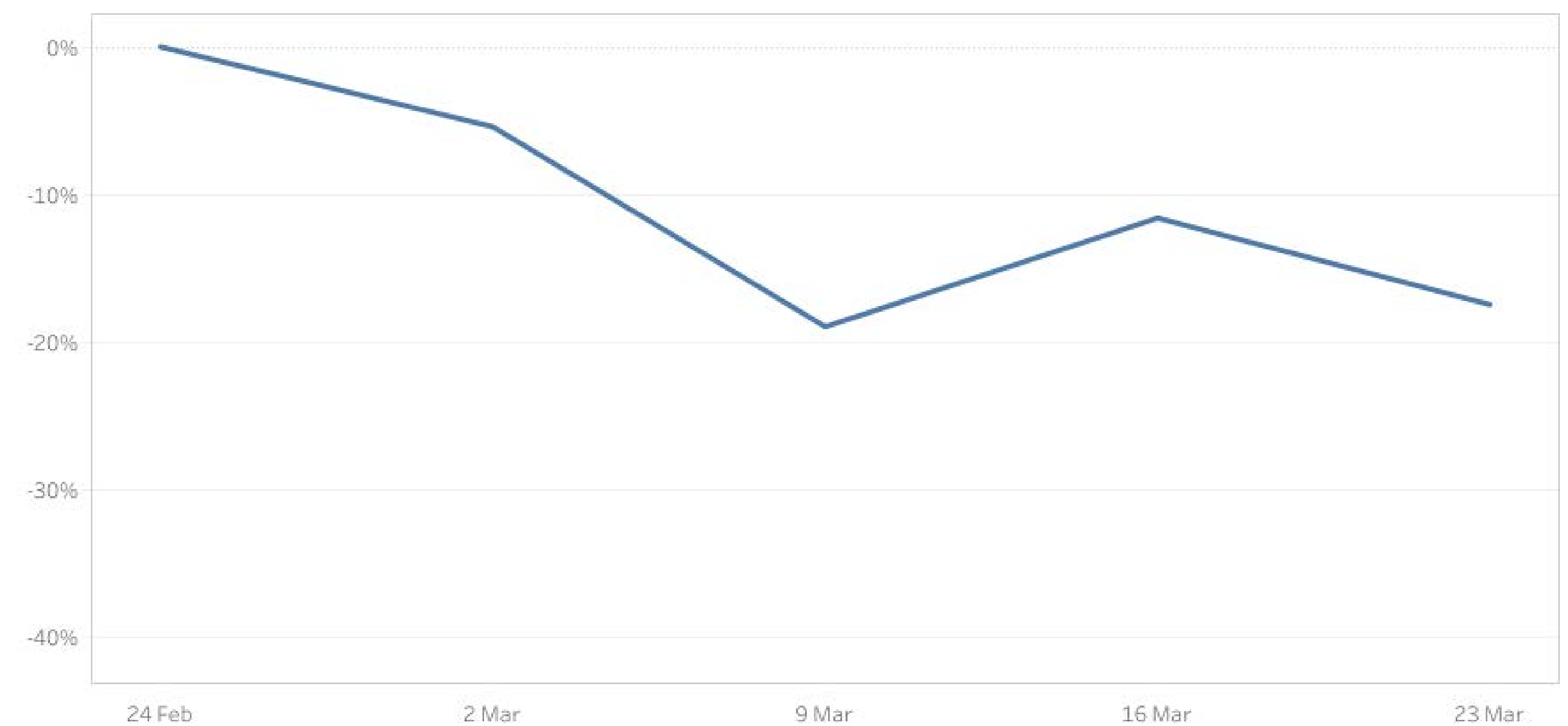


*Data Source for IN - MoEngage
*Data Source for SEA, NA, EU, MEA - Apptopia

Data collected for March 2020



OBSERVATIONS

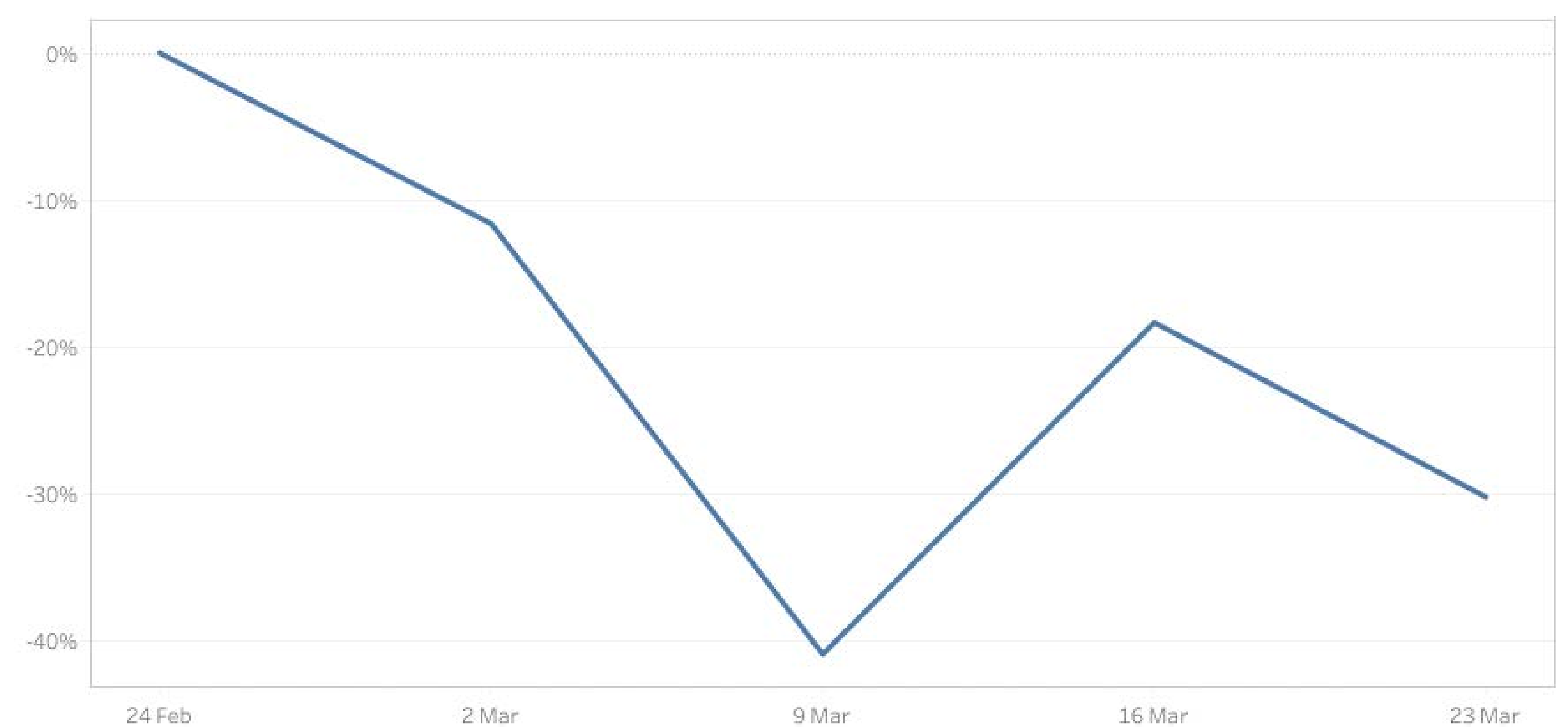


Decrease in active users in March 2020 in India

Edtech apps in general, have seen an **increase** in downloads and active users. Many educational organizations like schools, colleges, and universities, have started providing online classes for their students. While classes are conducted on video conferencing apps, edtech apps help students exchange study material, submit assignments, and collaborate.

INDIA

India has seen an interesting trend in the edtech industry. While apps in other regions are witnessing high downloads and active users, online education apps in India are seeing their downloads and active users **plummet**.



Decrease in uninstall rates in March 2020 in India



HEALTHCARE & FITNESS

NORTH AMERICA

Downloads **78.00%**
DAU **5.00%**

MIDDLE EAST

Downloads **14.90%**
DAU **3.00%**

INDIA

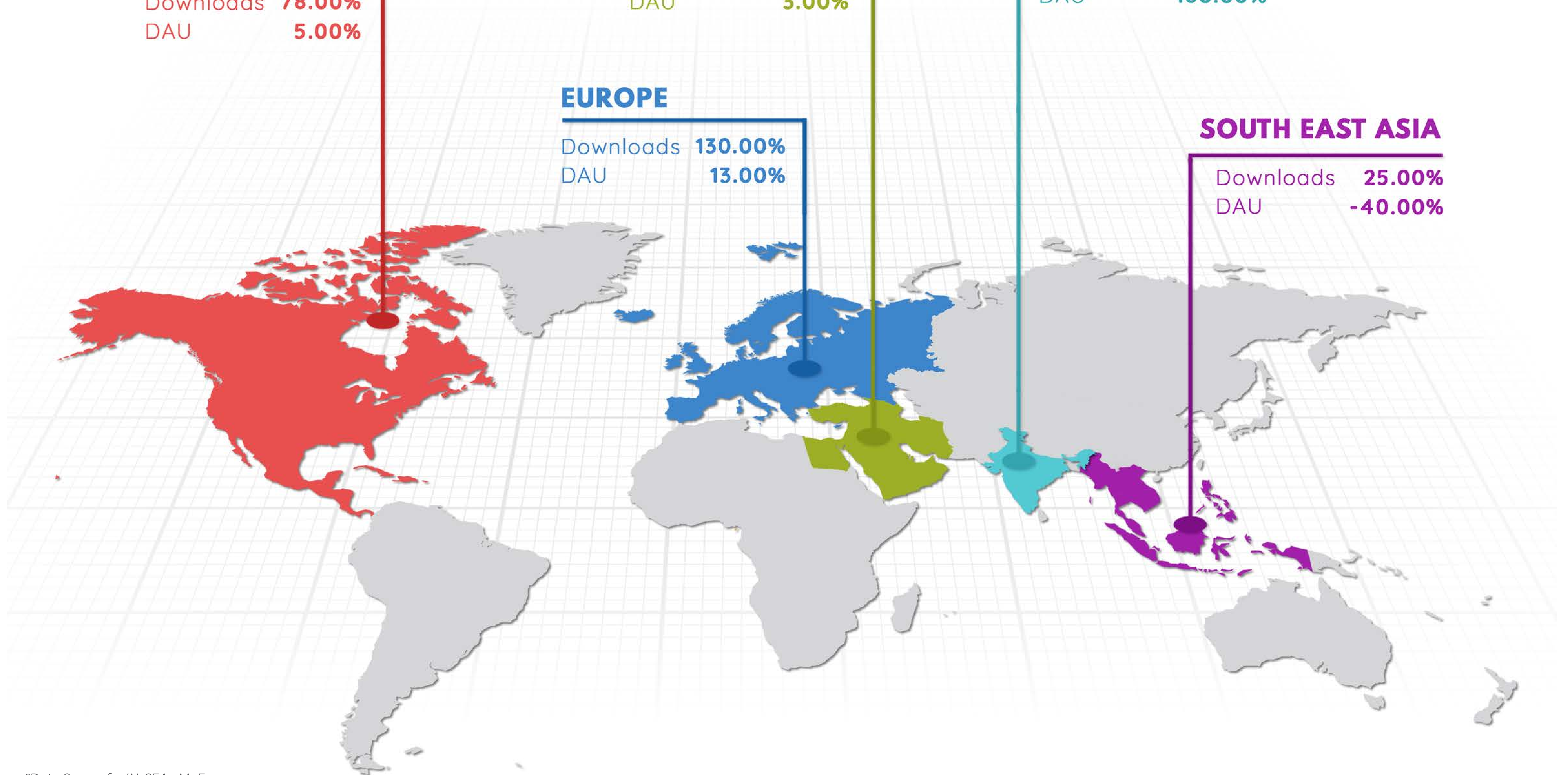
Downloads **-25.00%**
DAU **-180.00%**

EUROPE

Downloads **130.00%**
DAU **13.00%**

SOUTH EAST ASIA

Downloads **25.00%**
DAU **-40.00%**



*Data Source for IN, SEA - MoEngage
*Data Source for NA, EU, MEA - Apptopia

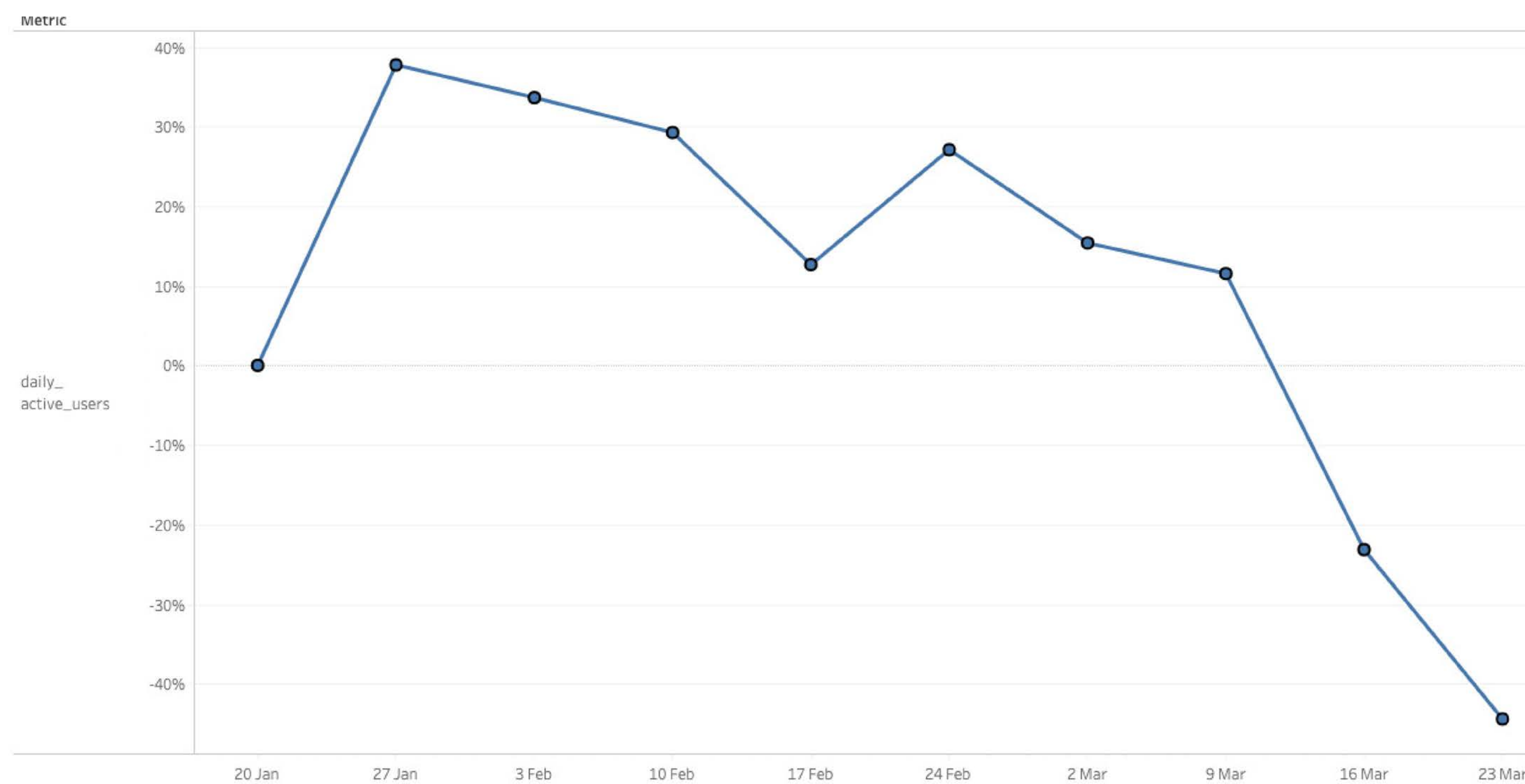
Data collected for March 2020



SOUTHEAST ASIA

OBSERVATIONS

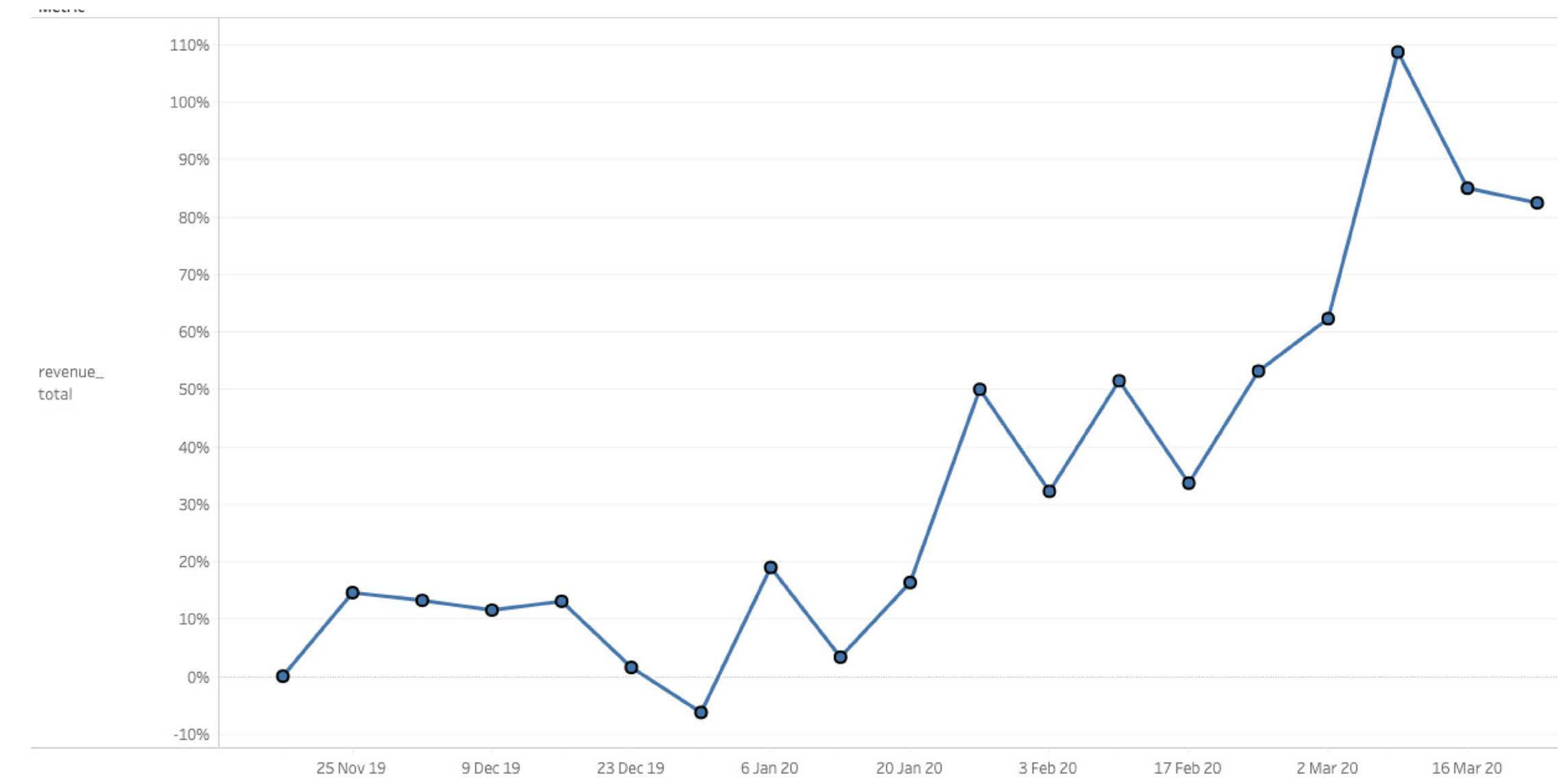
There has been a **steady decrease** in the active users and conversion rates on healthcare apps in Southeast Asia.



Decrease in active users from January 2020 to March 2020

We believe this is because healthcare apps in Southeast Asia have diverted their efforts for the time being to gain user trust by running multiple awareness campaigns.

This change in focus is paying off as it has resulted in a **110% increase** in spends on healthcare apps in Southeast Asia during this COVID-19 outbreak.



Increase in spends until March 2020

CUSTOMER STORIES

ALODOKTER

Alodokter, an Indonesia based healthcare super app that provides online healthcare services to more than **24 million users** across Indonesia, has been regularly hosting doctor-approved safety articles on the app for its users. These articles have information on COVID-19 affected areas, measures to control the spread and quarantine tips. Users receive these articles on their mobile devices via push notifications twice every day, to ensure optimum viewing and reading.

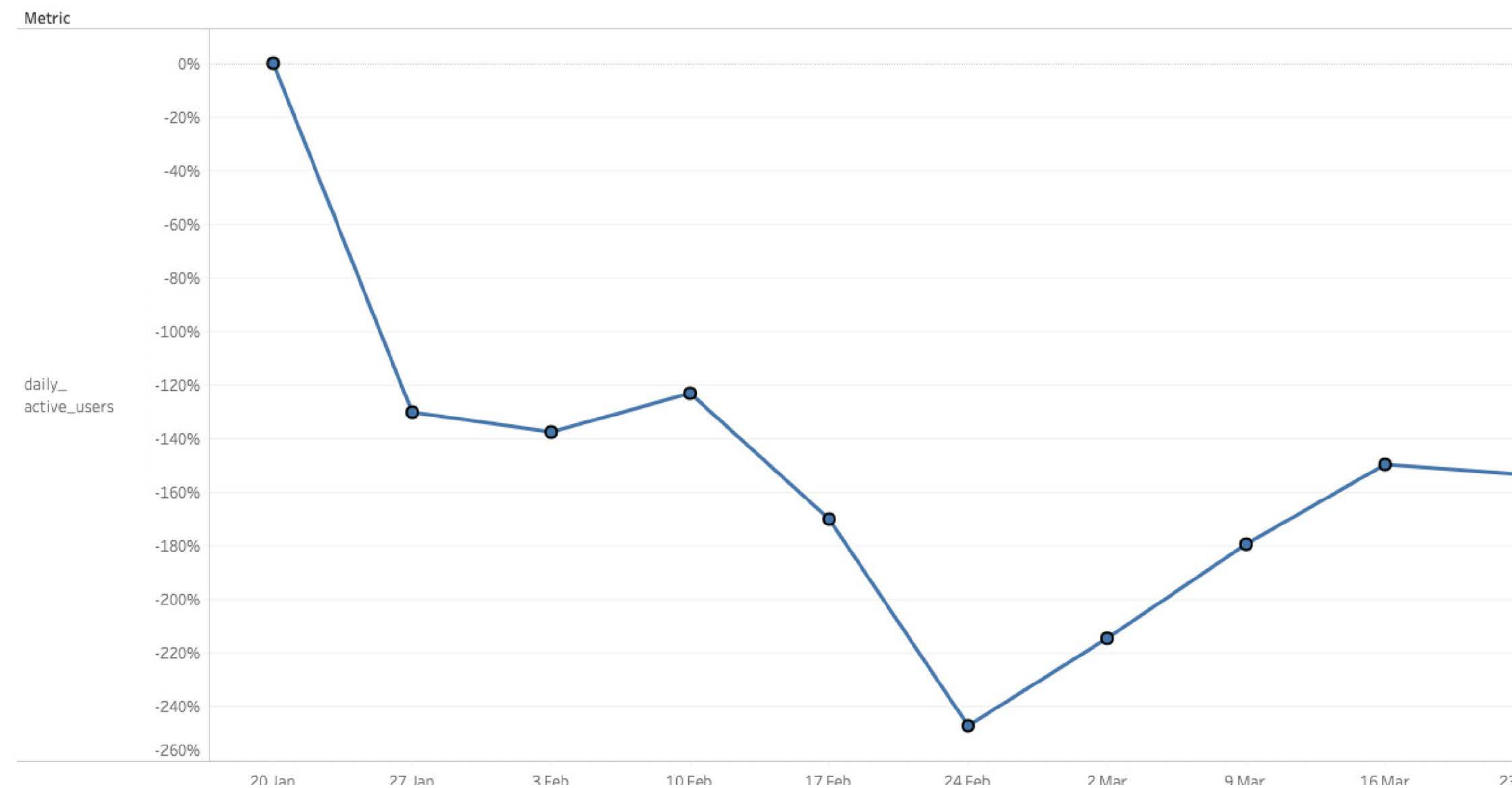
To curb anxiety, Alodokter has deployed real-time chatbots that help users with COVID-19 related queries and safety measures. The responses of the chatbots have been reviewed and approved by a panel of doctors. This chatbot has already interacted with more than **a million users** in less than a week.



INDIA

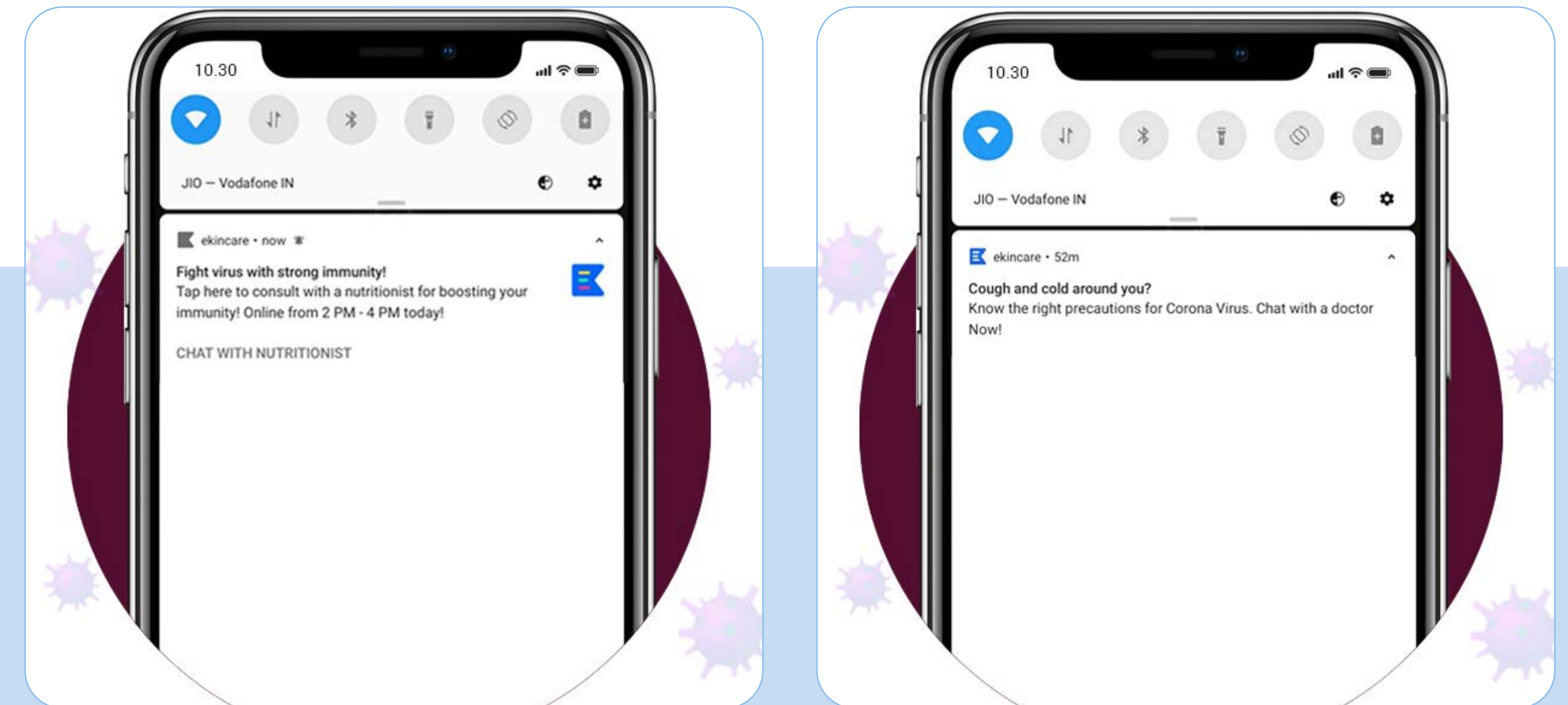
OBSERVATIONS

Similar to Southeast Asia, Indian healthcare apps have seen a **sharp decrease** in active users from January 2020 to March 2020.



Decrease in active users from January 2020 to March 2020 in India

CUSTOMER STORIES



EKINCARE

EkinCare, an integrated health service platform, has started offering 24x7 LIVE chat with doctors while spreading awareness about coronavirus and COVID-19.

Apart from this, EkinCare is offering a 'Consult a Nutritionist' service to assist people staying at home to talk to a nutritionist and understand what food products to consume in order to boost immunity. This campaign runs thrice a week.

They have also opened complimentary tele-consulting sessions with a team of in-house doctors for employees of various companies. Two push notifications are sent every day to EkinCare's users to encourage them to use this service.

COVID-19 IMPACT QUADRANT

The Impact Quadrant divides industry verticals in specific geographies into 4 major categories:

EXPLOSION: Industries that have seen huge demand both in terms of new user downloads and active users. Industries that fall under this quadrant are:

- Video Chat apps (worldwide)
- Online Shopping (North America & India)
- Healthcare (North America, Europe, and Middle East)
- Media and Entertainment (worldwide)
- Social Media (Southeast Asia)
- Real Estate (Middle-East Asia)

GROWTH: Industries that have shown rise in active users but not considerable rise in downloads. Industries that fall under this quadrant are:

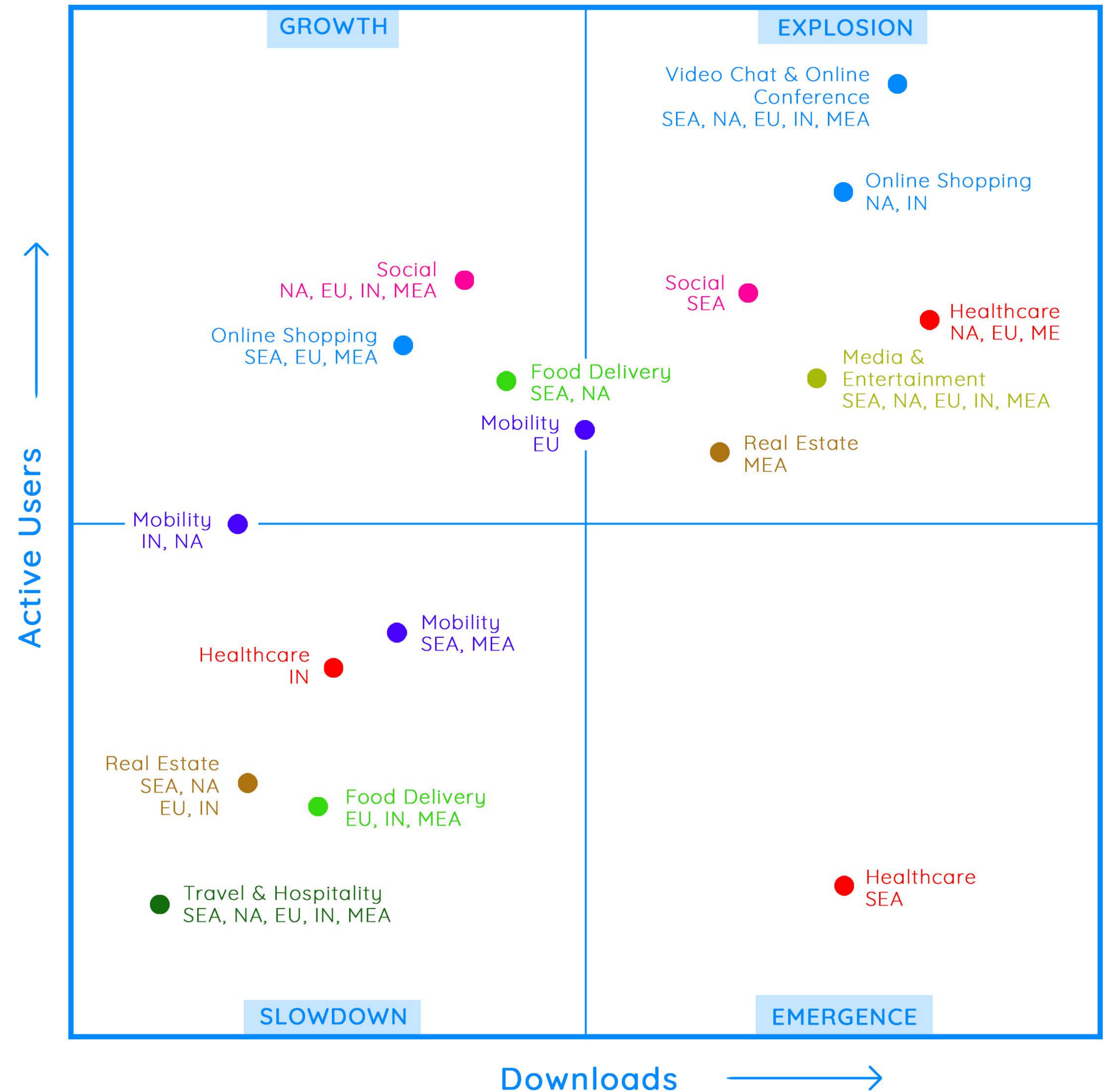
- Social Media (North America, Europe, India, & Middle-East)
- Online Shopping (Southeast Asia, Europe, Middle-East Asia)
- Food Delivery (Southeast Asia, North America)

SLOWDOWN: Industries that have seen decline in both active users and new app downloads. Industries that fall under this quadrant are:

- Travel & Hospitality (worldwide)
- Mobility (worldwide)
- Real Estate (Southeast Asia, North America, Europe, India)
- Food Delivery (Europe, India, Middle-East Asia)

EMERGENCE: Industries that have shown promise with getting new users downloads but not active users. Industries that fall under this quadrant are:

- Healthcare (Southeast Asia)



CONCLUSION

In the last few weeks, your business may have flipped for the better or the worse. This in-depth resource is for marketers and business owners who are unsure about how to approach marketing during COVID – 19 pandemic. We hope these data backed insights help you create valuable assets for your customers in uncertain times like this.

Key Takeaways for mobile app marketers during COVID-19

Mobile Marketers from the worst-impacted industries, where operations have come to a halt, can follow these tips:

SEND AWARENESS CAMPAIGNS



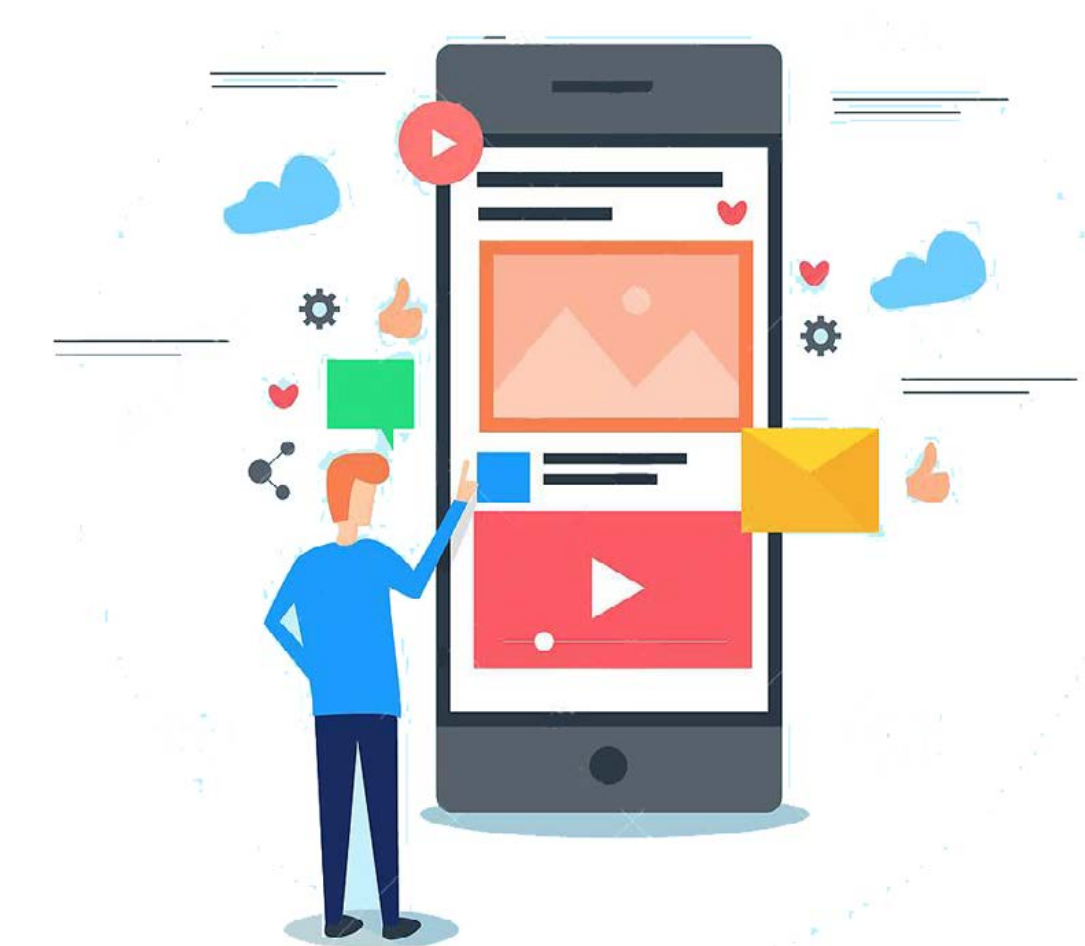
Educate users about the steps you're taking for them. Remember, consumers are anxious, and winning their trust during these times is vital. Use push notifications, emails, and text messages to send regular updates to your users.

BUILD STRONGER CORE CAPABILITIES



Use this time to invest in building a strong CRM stack, fixing data flow and identifying shortcomings in the current stack. This will improve readiness and you can start strong when business resumes.

ENGAGE USERS WITH CONTENT



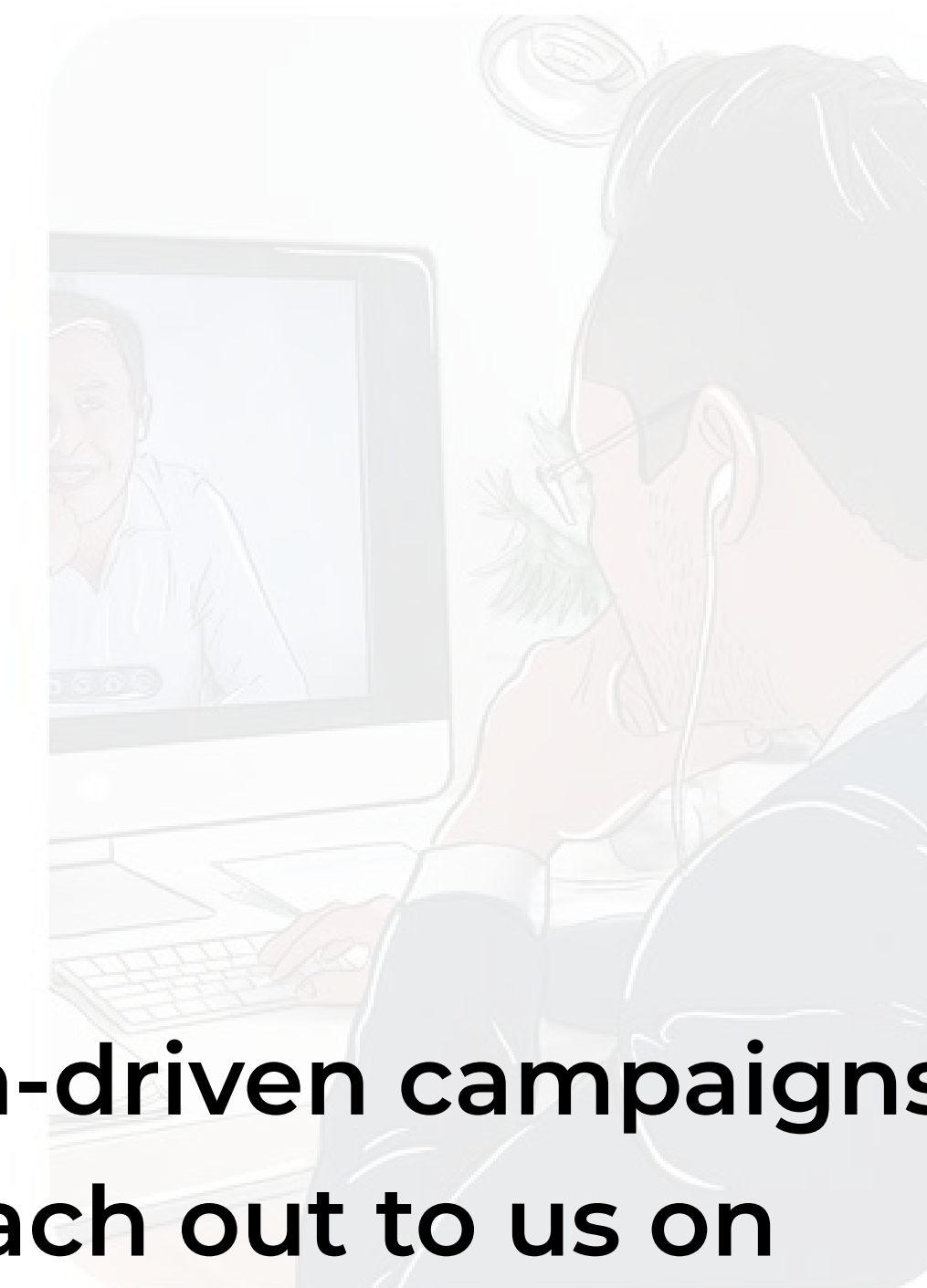
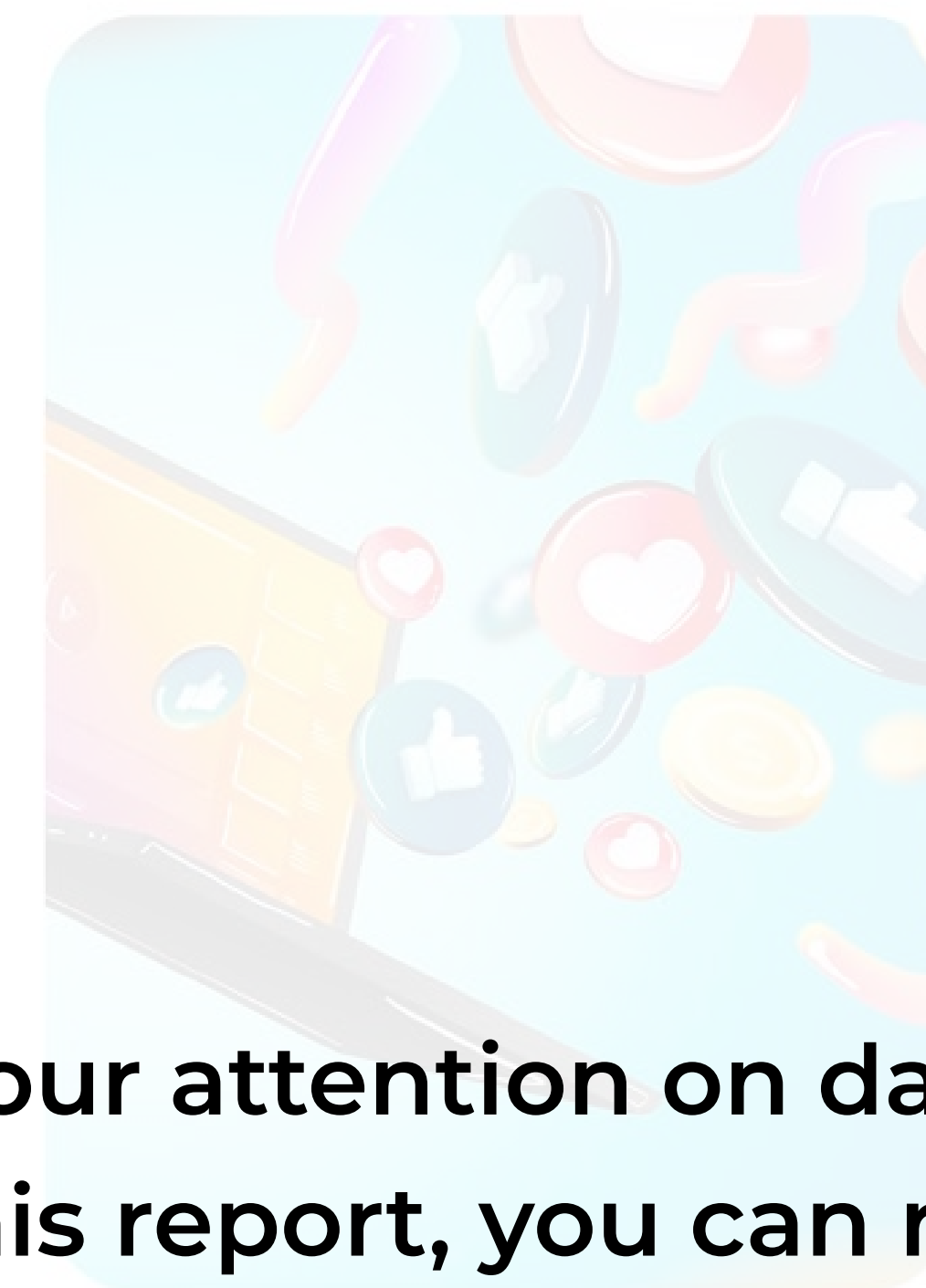
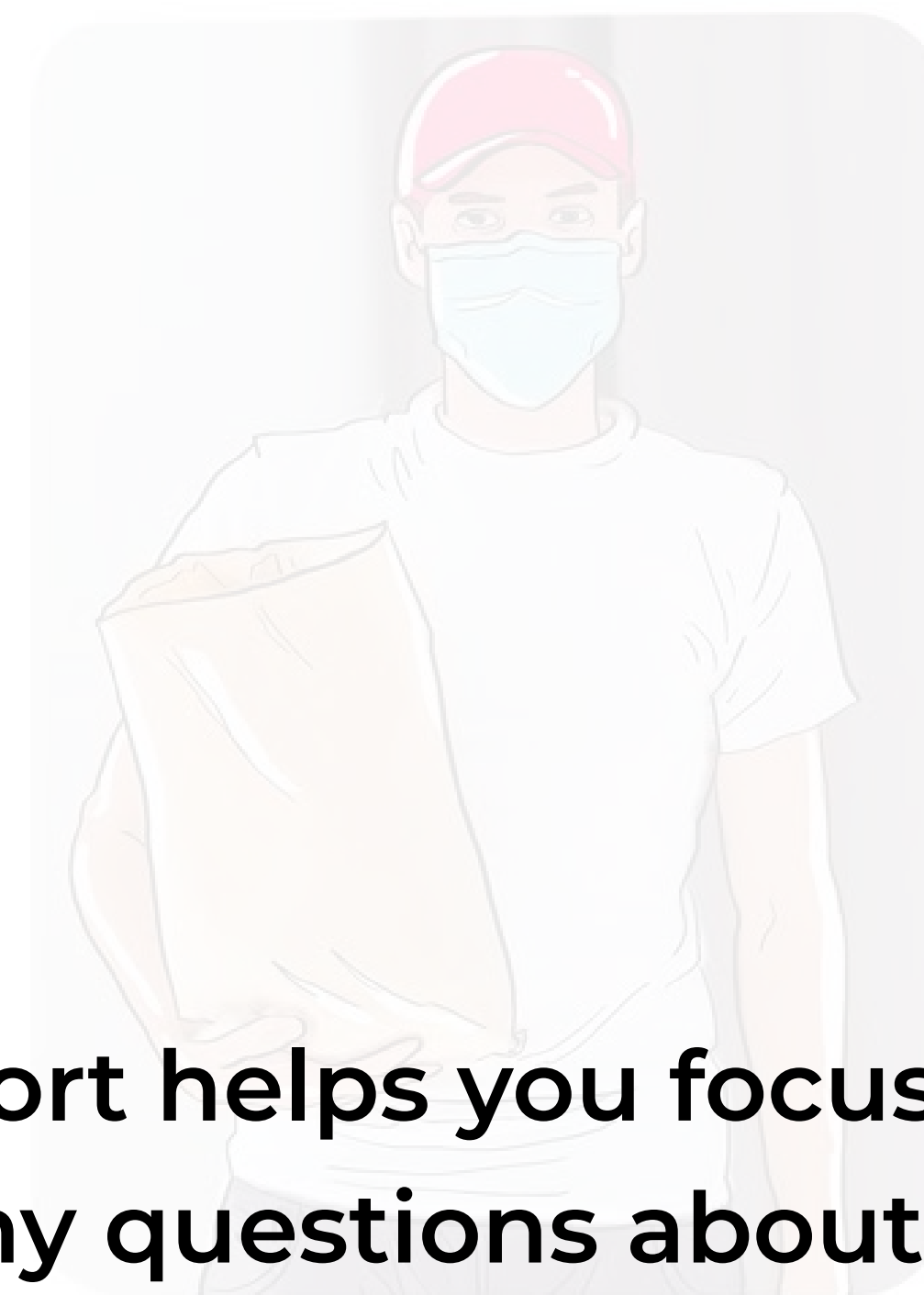
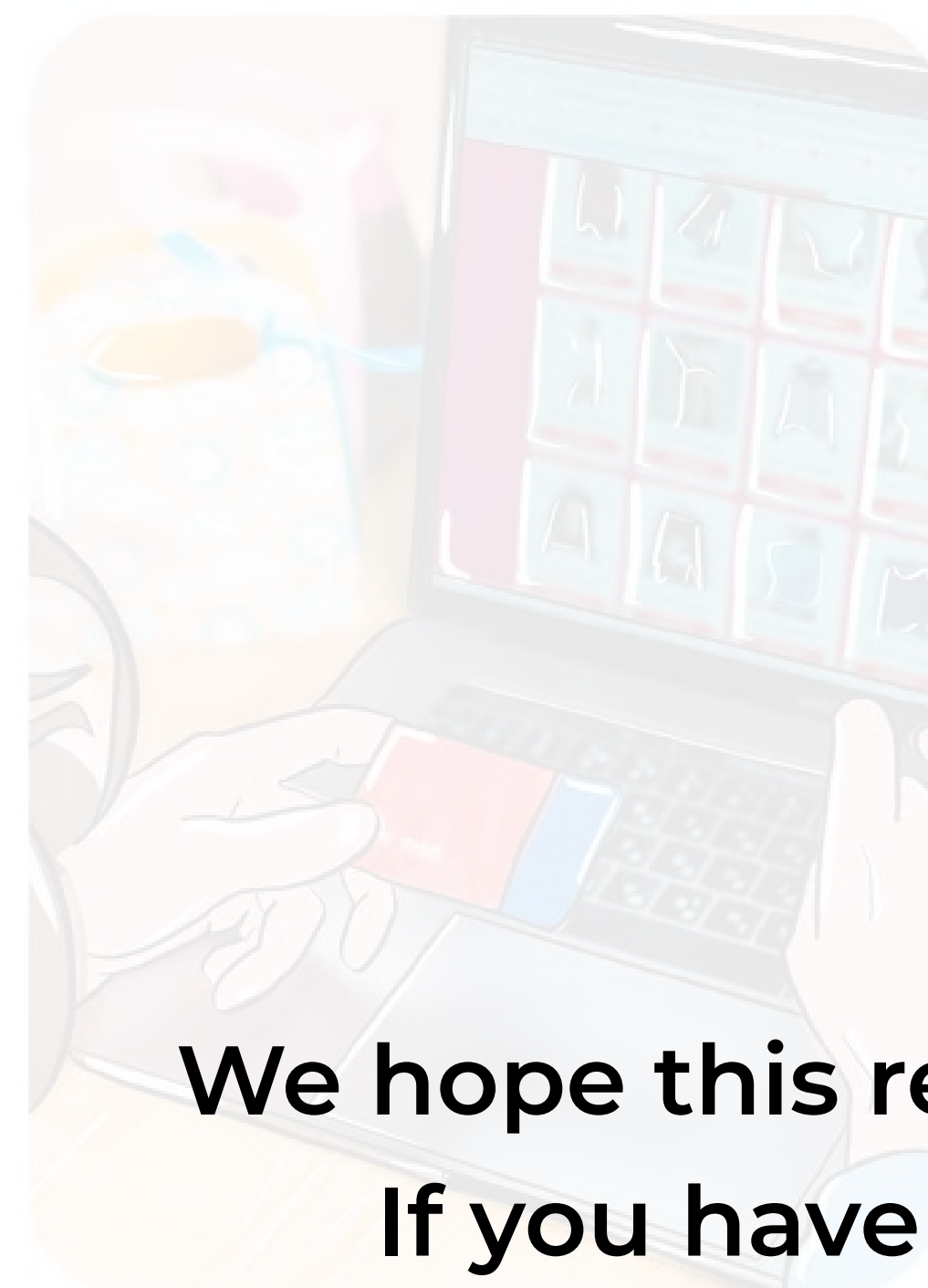
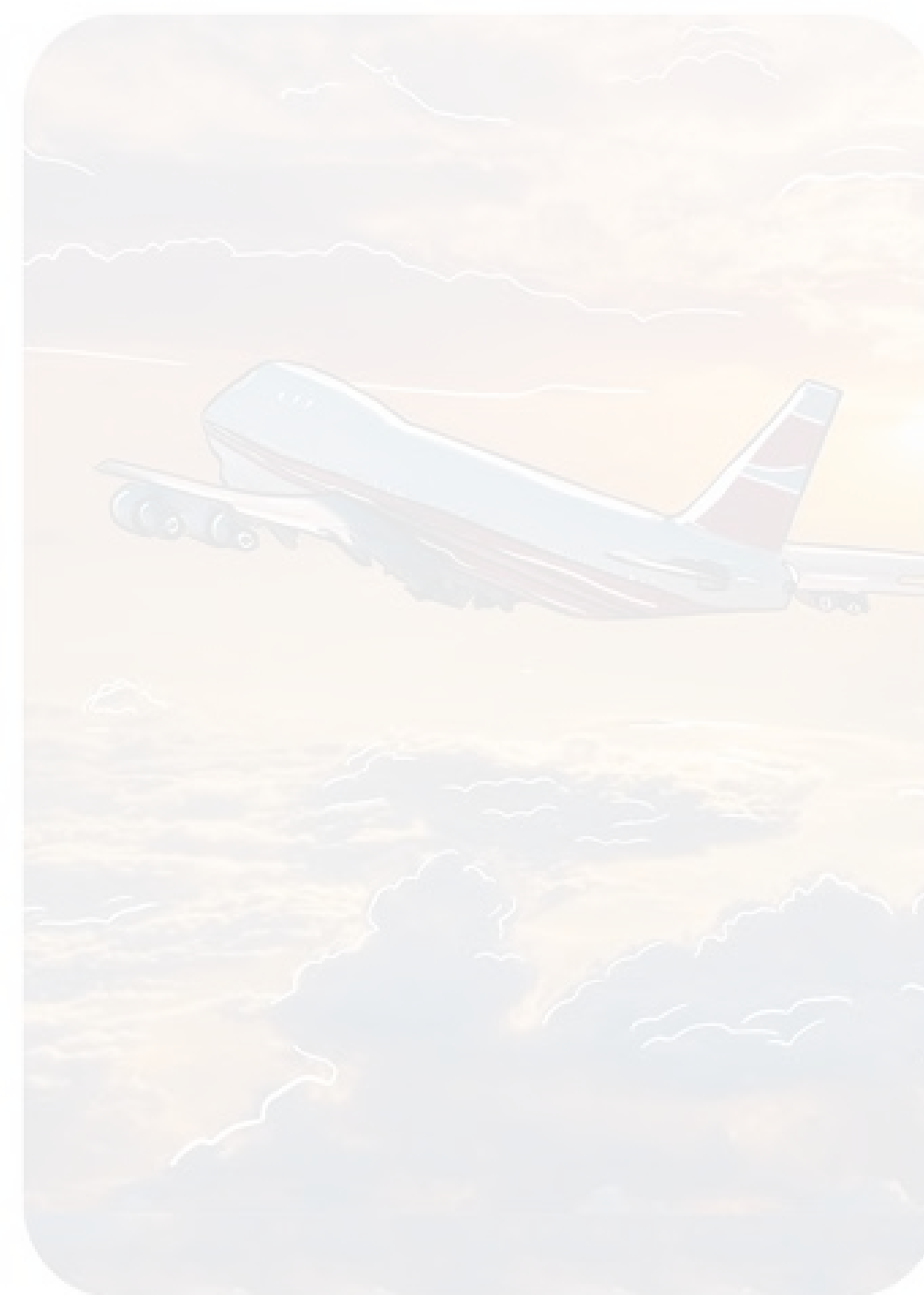
To increase active users, invest resources in curating bite-sized content that resonates with your users. Create videos, interactive carousels, quizzes, and image cards and host them on your app.

ABOUT MOENGAGE

MoEngage is an intelligent customer engagement platform, built for the mobile-first world. With AI-powered automation, optimization capabilities, and in-built analytics MoEngage enables hyper-personalization at scale across multiple channels like mobile push, email, in-app, web push, On-site messages, and SMS. Fortune 500 brands across 35+ countries such as McAfee, Samsung, and Vodafone use MoEngage to orchestrate their omnichannel campaigns. MoEngage has been featured on Gartner's Magic Quadrant for two consecutive years and is the youngest company on the list.

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.



We hope this report helps you focus your attention on data-driven campaigns.

If you have any questions about this report, you can reach out to us on

content@moengage.com

