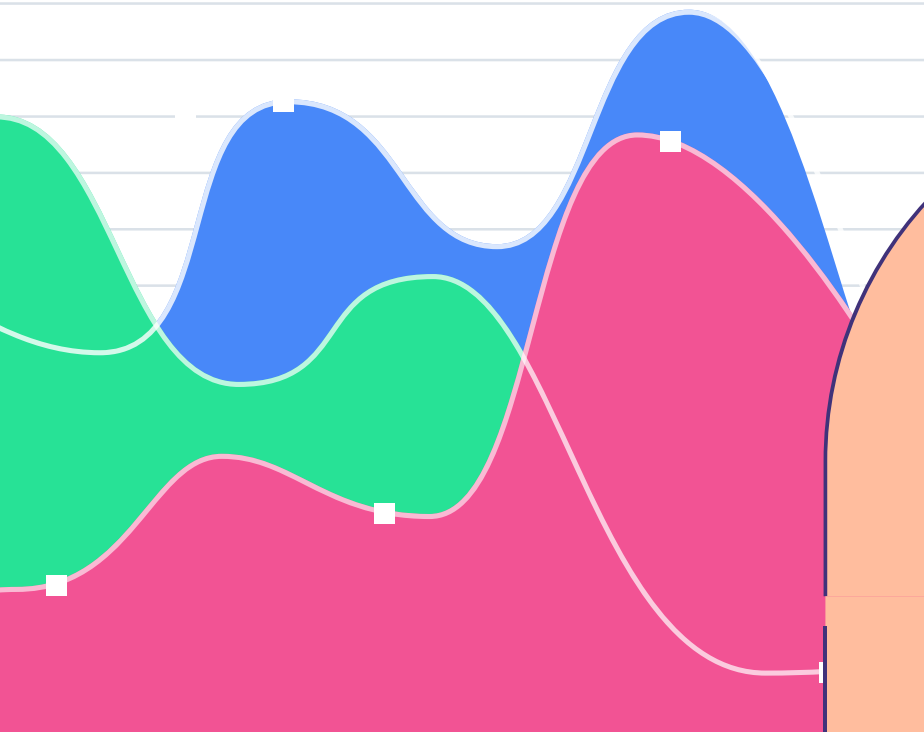
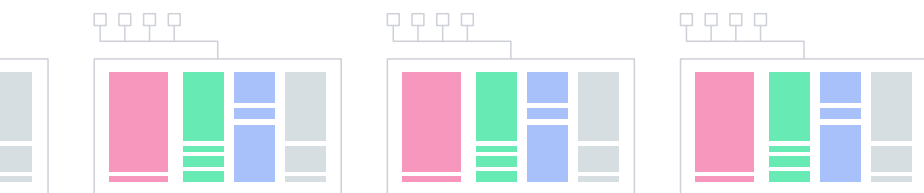


CleverTap

Data Report

How COVID-19 Has Affected
Mobile Brands

With install and revenue data from  AppsFlyer





In a matter of weeks, the COVID-19 pandemic disrupted daily life on an unprecedented scale. It has since transformed the global economic landscape, social behaviors, and consumer habits.

2.9 billion people - one-third of the global population - were placed under lockdown orders. [And according to the UN, 81% of the world's workforce had their workplace fully or partly closed because of the outbreak.](#)

The sheer scale of disruption is difficult to quantify, and the effects of the pandemic, both immediate and long-term, are still playing out. Amid all the uncertainty, however, one thing is clear: businesses are under a great deal of stress as consumers shelter in place, tighten their wallets, and adjust to an evolving normal.

So what is the fallout for mobile brands?

Based on AppsFlyer's data and data collected by CleverTap, our data science team analyzed and identified mobile trends from January to June of 2020 to help marketers understand what kind of growth to expect in the context of COVID-19.

Key Findings

- Apps increased their install ad spend by 20% by early May.
- In-app revenue remains strong: consumer spend in non-gaming apps has grown nearly 50% since mid-March, and gaming revenue surged 42% by early May.
- Some app industries have seen a surge in user engagement - some as high as a 177% average increase in daily active users (DAUs).
- For struggling industries, app launches fell as much as 60-80%.
- Marketers in thriving industries responded by ramping up campaign activity, in some cases by more than 60%. Meanwhile, struggling industries showed a significant drop in campaign volume as marketers refocused strategies and determined next steps.
- In general, marketers who reduced campaign volume saw a corresponding dip in CTRs, while industries that increased campaign activity were rewarded with higher engagement - suggesting users remain responsive to marketing activity.
- For some industries, Day 7 retention jumped almost 70% over the course of Q1. Other verticals are struggling to retain customers after seeing up to 68% higher churn in March and April.

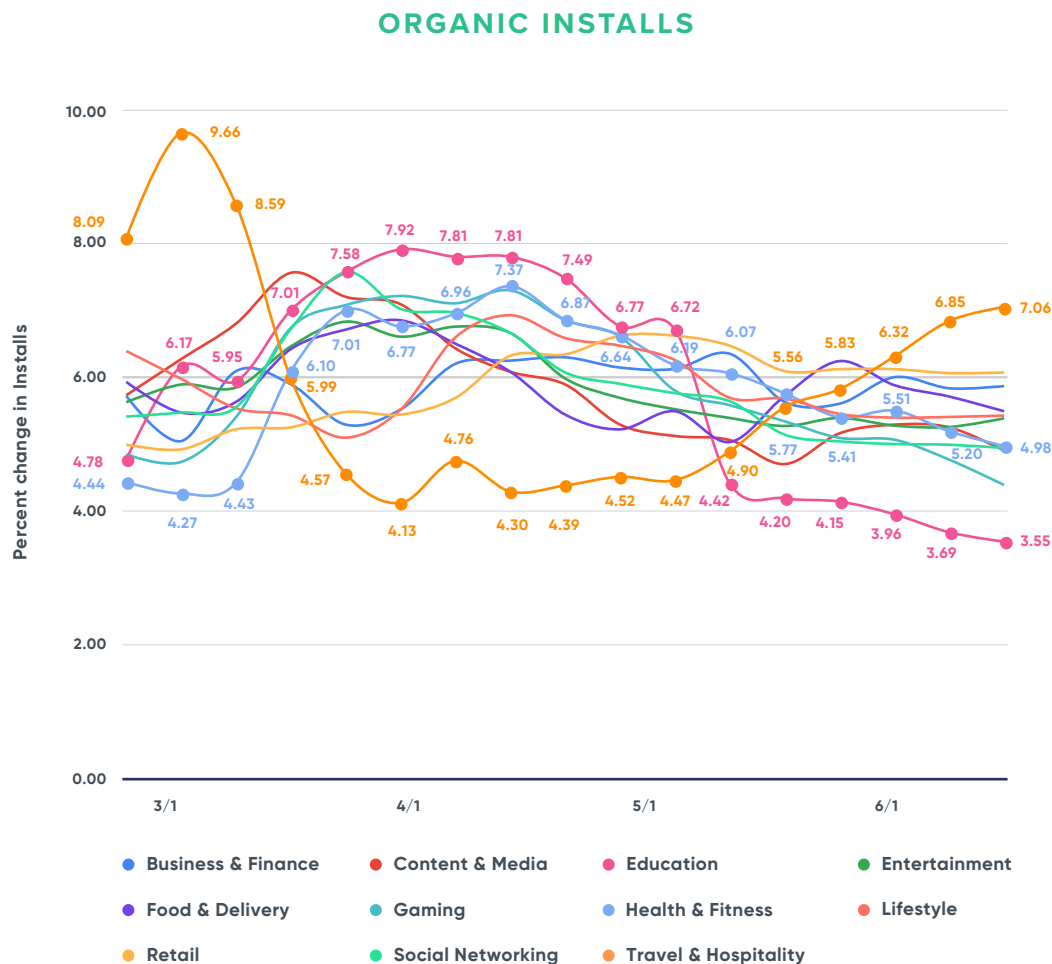




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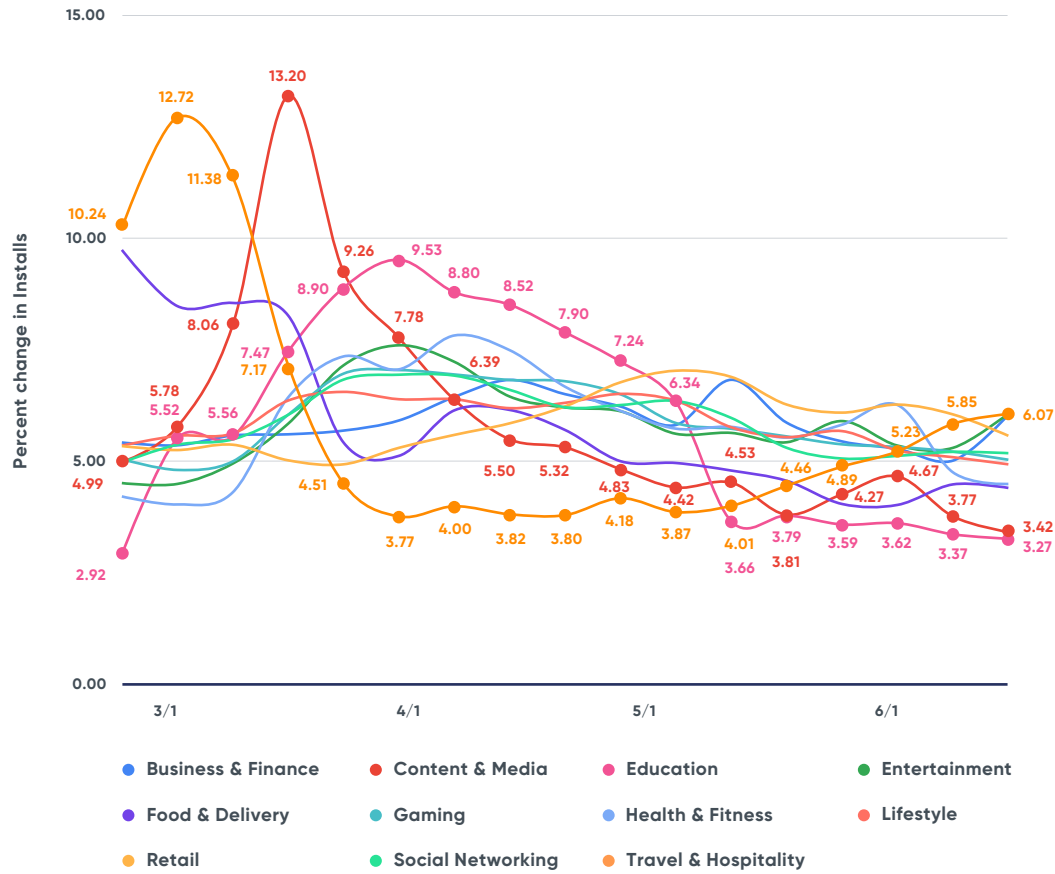
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App Installs: COVID-19's Effect on User Acquisition



Source: AppsFlyer

NON-ORGANIC INSTALLS



Source: AppsFlyer

Note on Methodology: Data was normalized by dividing the weekly share of installs/sessions/spend/revenue by the overall number of installs/sessions/spend/revenue throughout the entire examined time frame. As such, the entire period adds up to 100% and each week represents the share out of the total.



App install ad spend is down but remains higher than pre-lockdown days.

With aggressive user acquisition during lockdown, apps increased their spend by 20% by early May to meet heightened demand. Since then, spend has dropped by 12% but remains almost 5% higher than pre-lockdown days.

Beyond the natural decline in demand following a surge, the cost of media (in this case, cost per install) has steadily risen week by week, and is currently 40% higher in gaming and 30% higher in non-gaming compared to rates in mid-March. Many of the brands that considerably reduced their spend early on have started spending again, driving prices up and leaving advertisers with fewer users to acquire with the same budget.

Overall spend by gaming apps jumped 35% by early April and has since gradually decreased (22% by the end of June); spend in non-gaming apps has gradually increased since lockdown started, peaking much later towards the end of May and dropping 10% since.

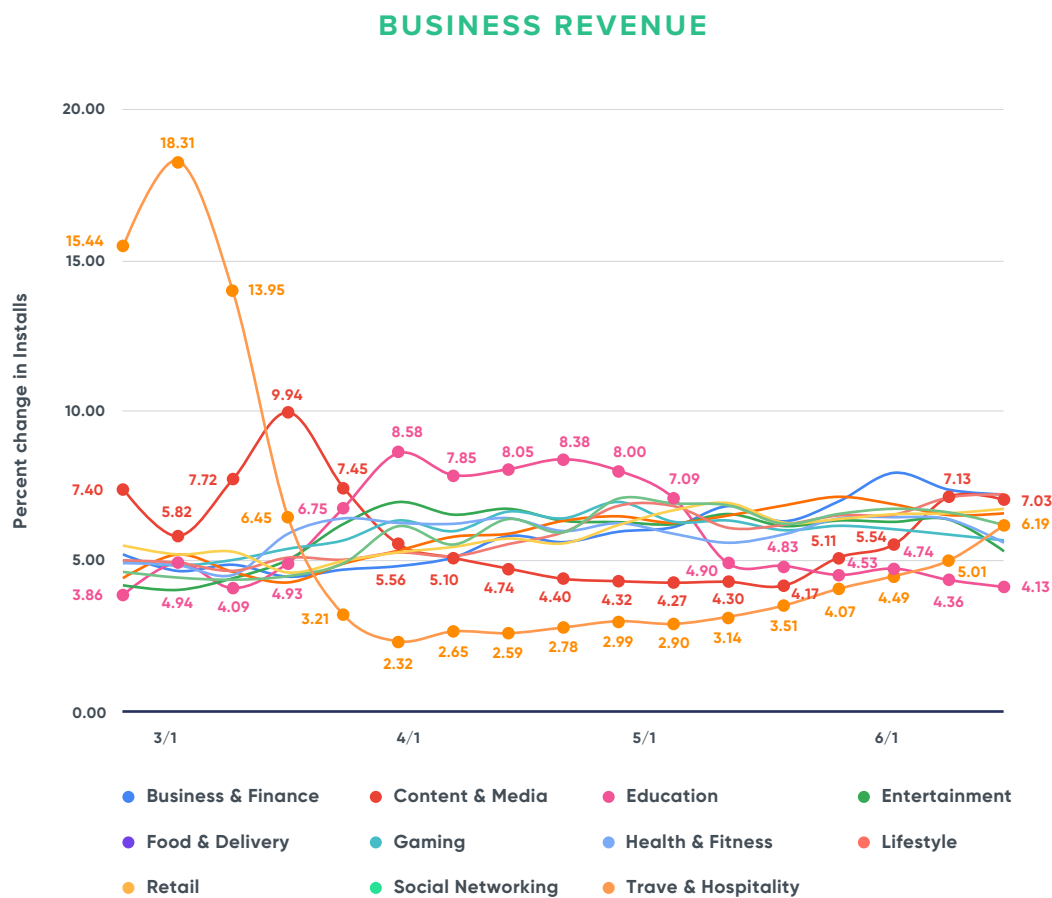
In the US, gaming and non-gaming spend surged 37% and 25% during lockdown, respectively. In the following month, non-gaming spend continued climbing, while gaming budgets started to drop. Despite the decline in May and June, app install ad spend remains 17% higher than pre-lockdown (+23% in non-gaming and +10% in gaming).

A prolonged drop in Gaming installs, as non-gaming mostly flattens.

After the early spike in app installs (+25% in organic, +35% non-organic by early April), the demand has naturally decreased leading to a 16% drop in organic installs since mid-March. Lower demand and especially rising media costs have also led to a larger 30% drop in marketing activity during the same time frame.

Once again, a stark difference is seen between gaming and non-gaming apps. While gaming app installs have continuously declined since mid-April, the non-gaming install drop stabilized from mid-May to the end of June as many brands resumed marketing activities and consumer demand increased as well.

Mobile Business Revenue: A Shifting Economy's Influence on Monetization



Source: AppsFlyer



In-app revenue maintains a strong showing post lockdown.

Consumer spend in apps mostly flattened from mid-May through June as the new normal sinks in and many countries re-open. The good news for apps is that revenue has remained high following the 45% jump during lockdown. Overall, the app economy is clearly not showing signs of a recession.

Consumer spend in non-gaming apps is particularly impressive, growing almost every week and nearly 50% since mid-March. Gaming revenue, in a trend seen across genres, surged 42% by early May and has since dropped 22%.

Apps are succeeding in monetizing users who were mostly acquired during lockdown, when marketers were quick to react to meet the massive demand. As many users continue to use these apps, their in-app behavior, seen in AppsFlyer's session data, remains 20% higher than pre-lockdown days.

50% of app categories experienced positive revenue growth in June.

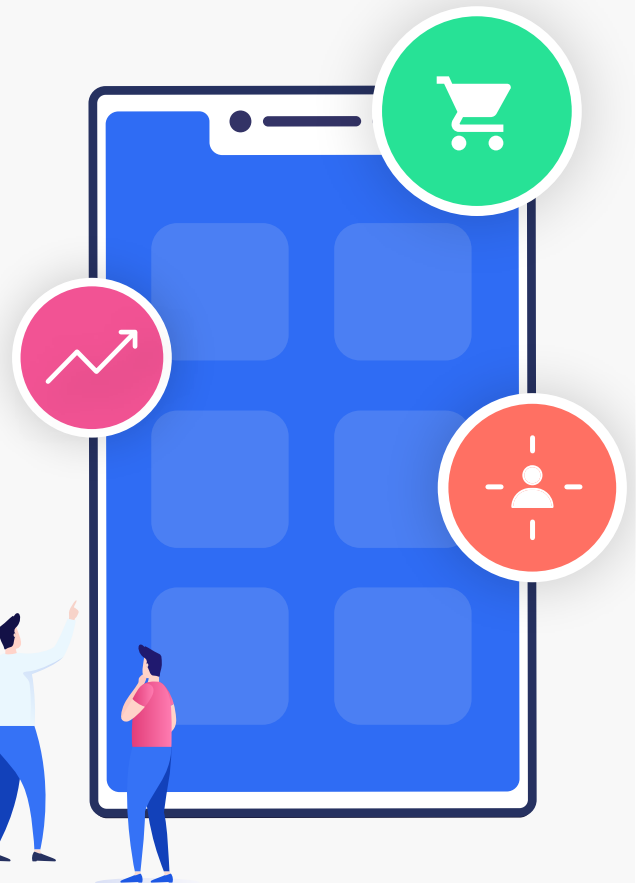
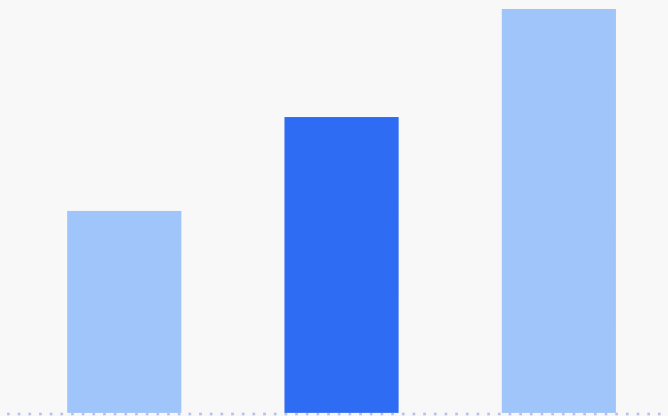
Globally, the share of categories that have experienced a revenue uplift in June was just over 50%. When comparing the share of verticals that experienced a revenue uplift since the start of lockdown, that number rises to over 60%.

Shopping, Finance, and Lifestyle apps see a revenue climb.

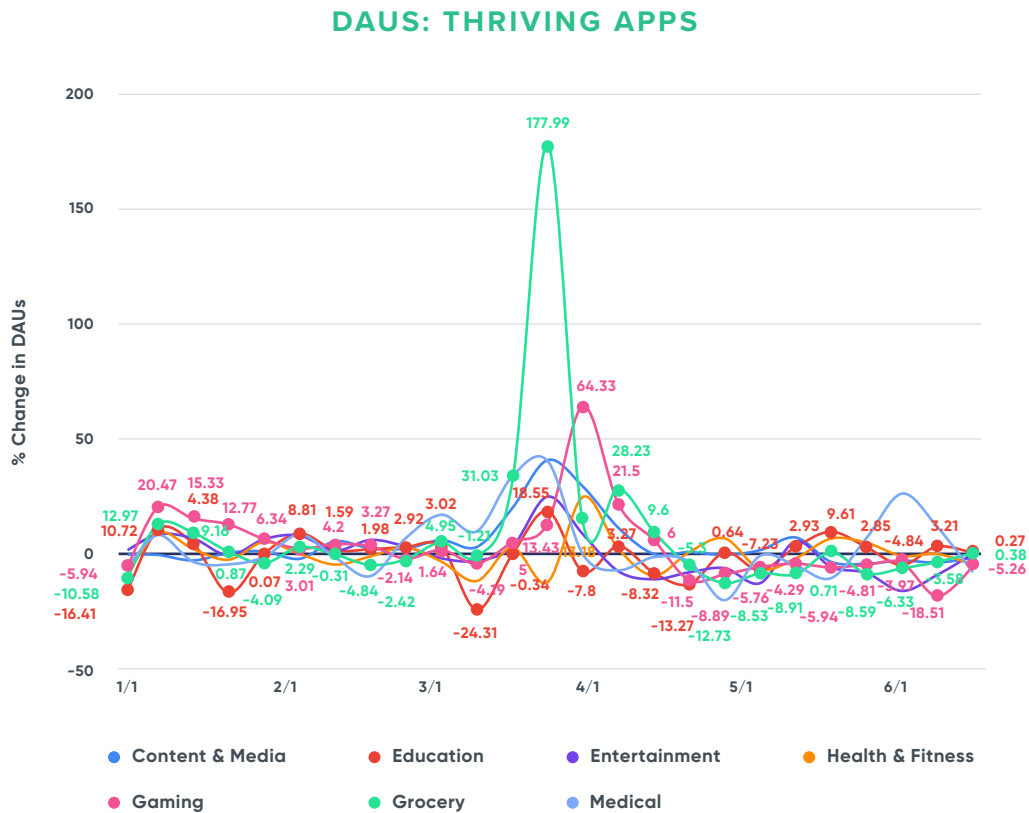
Based on data from AppsFlyer, consumer spend in shopping apps has increased 50% since the start of lockdown and a further 8% in June as demand for online shopping continues to rise. Although marketing activity in shopping apps dropped 11% in June, it remains 15% higher than pre-COVID days, while organic interest has flattened in the past month.

Finance revenue surged 75% since lockdown started, driven by heightened usage of financial services and investment apps as people increasingly rely on digital transactions and portfolio management.

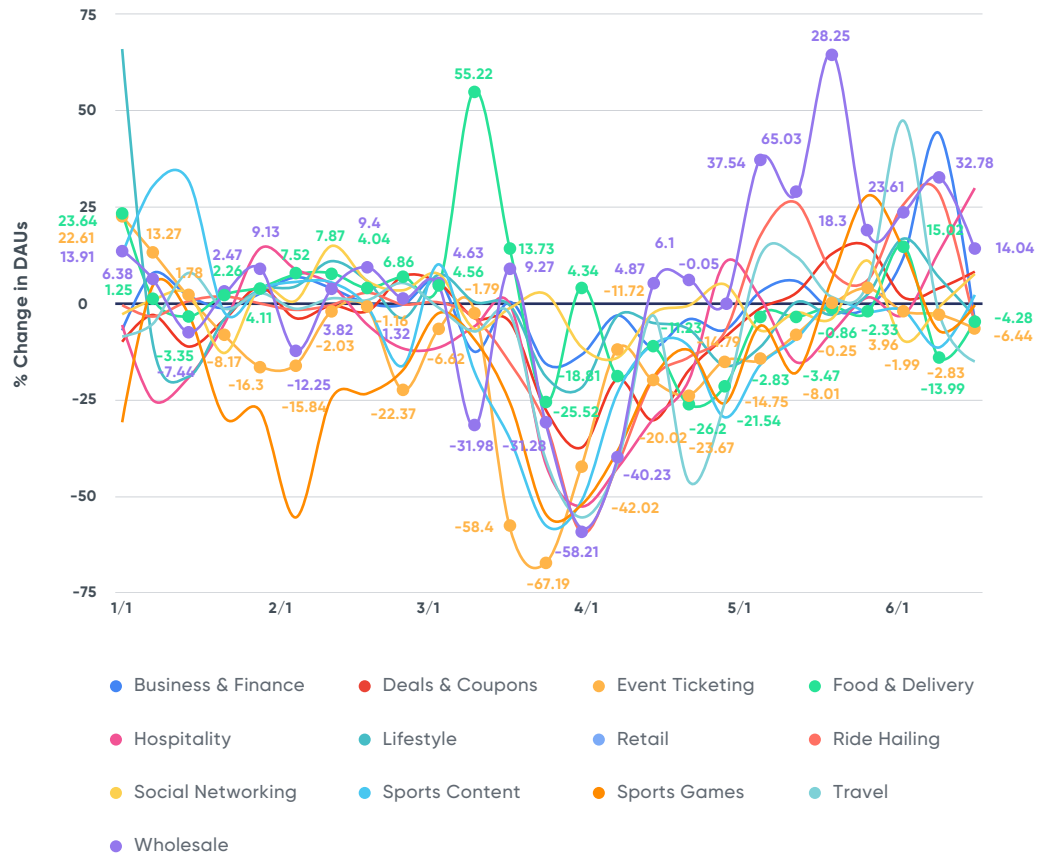
Revenue generated by lifestyle apps almost doubled since mid-March, growing a further 35% in June. These apps were able to maintain increased usage following the jump they experienced during lockdown.



DAUs: Understanding The Impact on App Engagement



DAUS: STRUGGLING APPS



A note on methodology: This data is based on an analysis of over 250 apps with an average of 30,000 DAUs. The percent change is in comparison to DAUs 15 days prior.

March 17 marks the date when many governments across the globe began to initiate lockdown orders, with 15 countries having some degree of shelter-in-place mandated by that date. By March 31, the number of countries on lockdown had nearly doubled to 29. The impact of these government lockdowns on app engagement is apparent in the dramatic spikes that start in mid-March.

Given widespread shelter-in-place orders, it's no surprise that users are turning to apps that keep them either entertained or connected to essential services. And with widespread lockdown orders, industries that require consumers to travel or gather in numbers are naturally among the hardest hit.



Thriving Industries:

- Content & Media
- Education
- Entertainment
- Health & Fitness
- Gaming
- Grocery
- Medical & Medicine Delivery

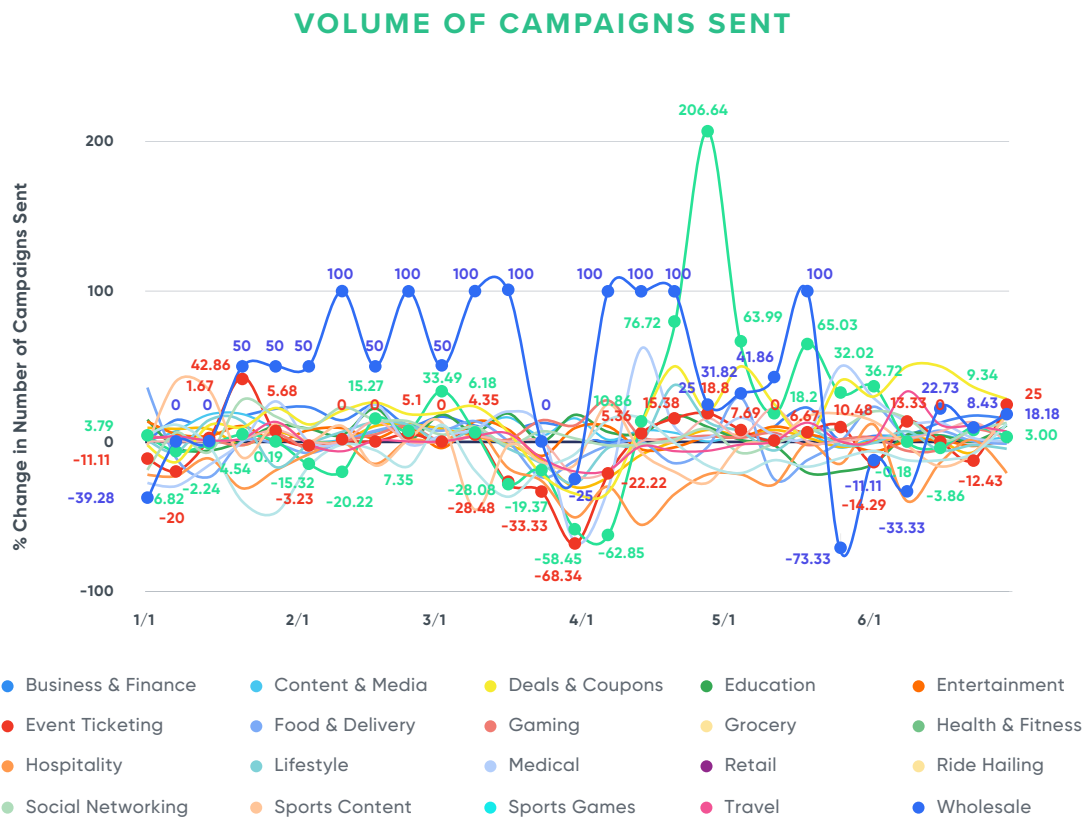


Struggling Industries:

- Business & Finance
- Deals & Coupons
- Event Ticketing
- Food & Delivery
- Hospitality
- Lifestyle
- Retail
- Ride Hailing
- Social Networking
- Sports Content
- Sports Games
- Travel
- Wholesale

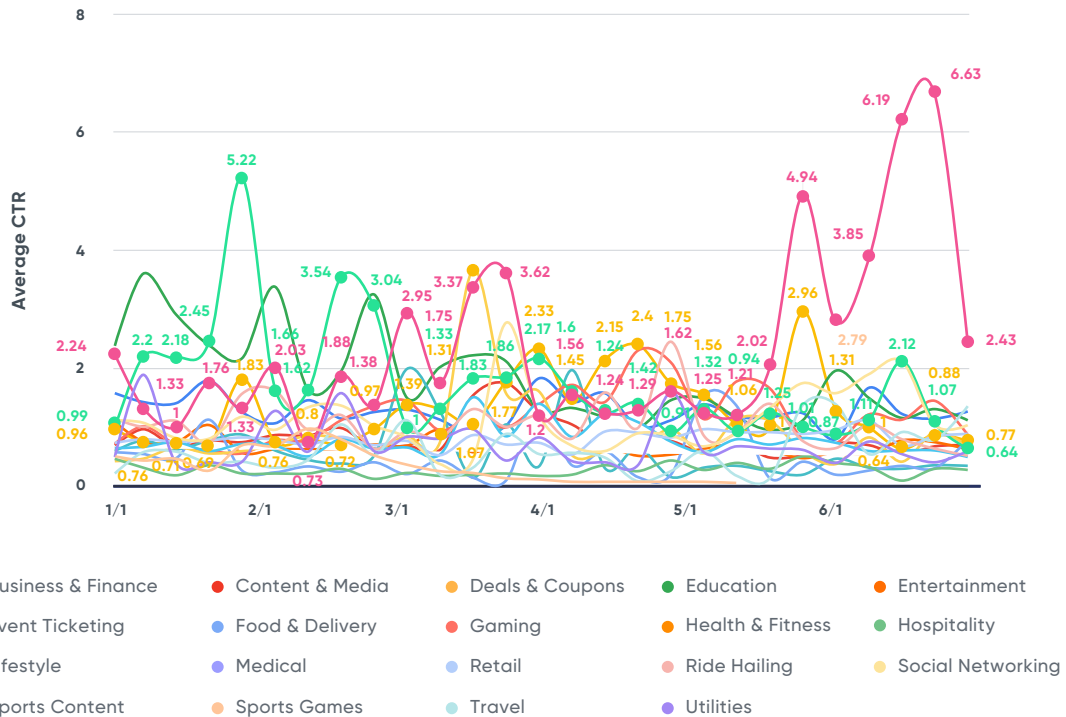


Campaign Activity & CTRs: Analyzing Marketing Performance



*Data based on an analysis of 358 billion messages sent by 273 apps
from January 1, 2020 to June 30, 2020*

PUSH CAMPAIGN CLICK-THROUGH-RATES



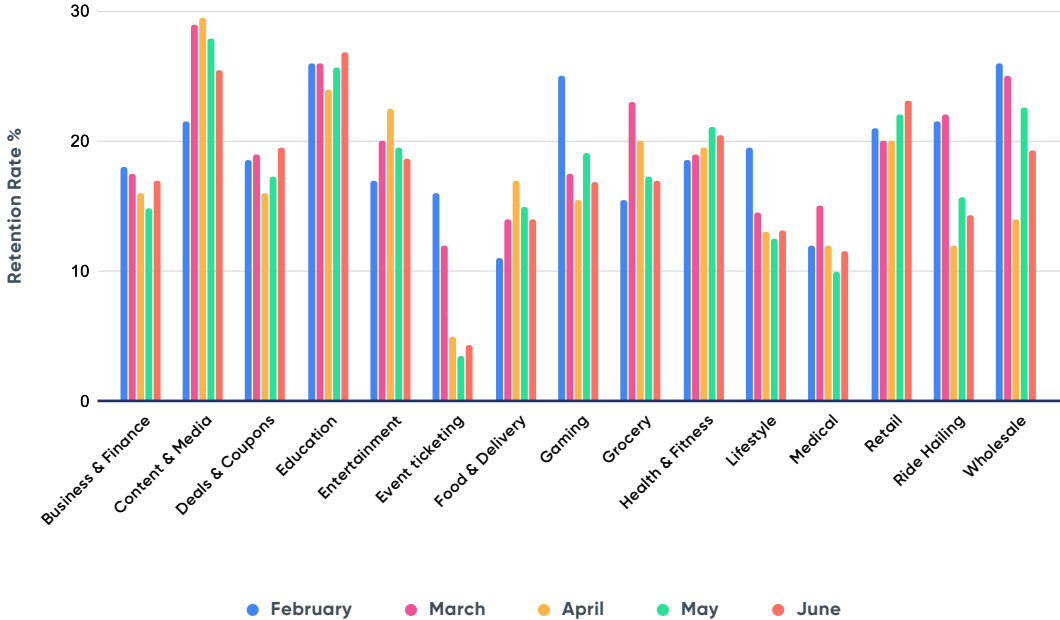
Data based on an analysis of 221 billion messages sent by 197 apps from
from January 1, 2020 to June 30, 2020

Generally speaking, marketers in thriving industries are capitalizing on this surge in user interest by sending more campaigns - and they're being rewarded with higher CTRs. An example is Education: after increasing campaign activity by 20% at times, these apps have seen an increase in CTRs of over 3%.

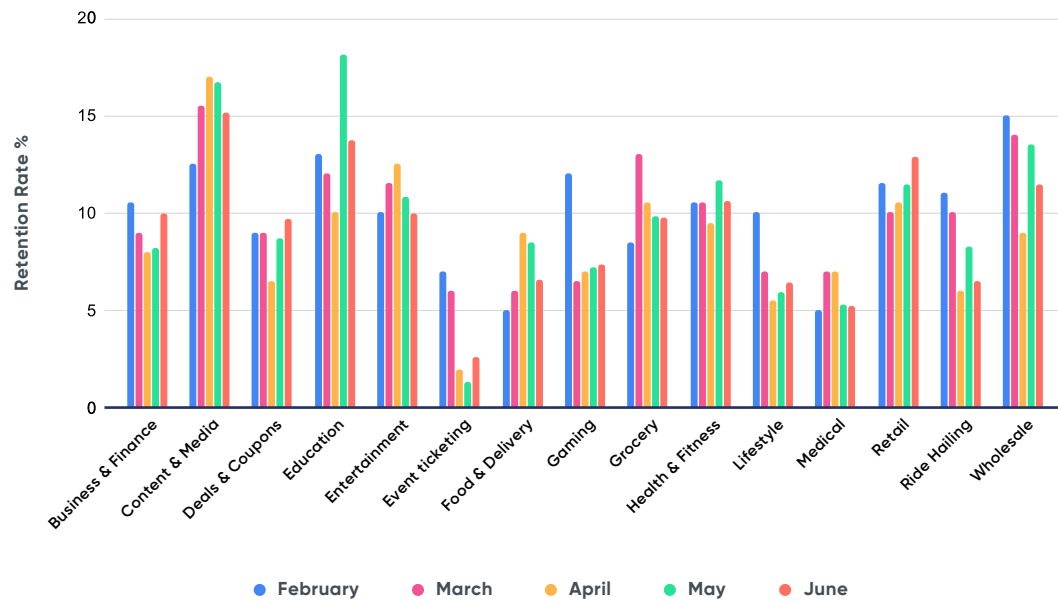
On the other end of the spectrum, struggling industries have either sent fewer campaigns overall or temporarily paused marketing activity in order to regroup and re-strategize. In spite of these efforts, CTRs for struggling industries are generally down or flat.

Customer Retention Rates: Examining 2020 App Growth

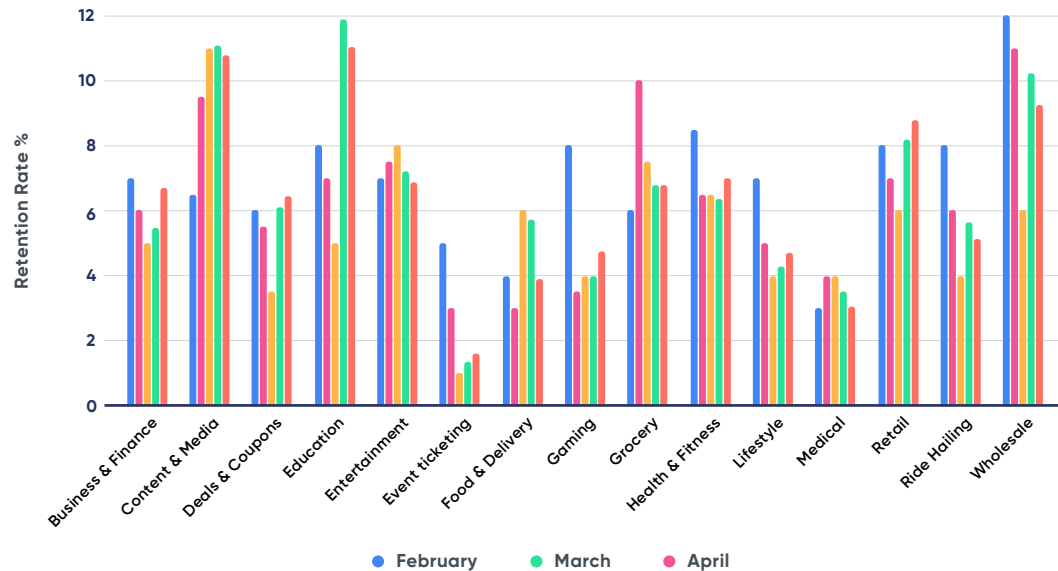
DAY 1 RETENTION RATES



DAY 3 RETENTION RATES



DAY 7 RETENTION RATES



Based on analysis of 242 apps

Sustainable business growth means more than app launches and campaign engagement. It means attracting loyal customers who stay engaged with your app, purchase frequently, and tell others about your service.

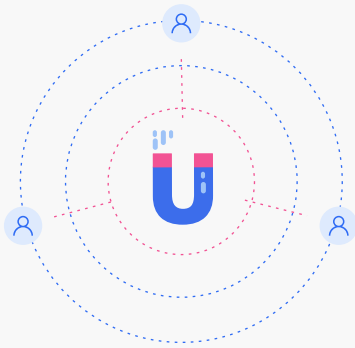
So how has the pandemic and subsequent global shutdown affected the metric that matters most for mobile brands: user retention?

Industries Seeing Higher Retention Rates

- **Content & Media**
- **Entertainment**
- **Food & Delivery**
- **Grocery**
- **Medical & Medicine Delivery**



Content & Media apps are enjoying a tremendous surge in user retention: Day 1 retention rates are up 37%, and Day 7 retention jumped up almost 70% over Q1. And while Food & Delivery apps saw a drop in DAUs, retention rates rose in April after a slight dip in March.



Industries Seeing Lower Retention Rates

- **Business & Finance**
- **Deals & Coupons**
- **Education**
- **Event Ticketing**
- **Gaming**
- **Health & Fitness**
- **Lifestyle**
- **Retail & Wholesale**
- **Ride Hailing**

As with DAUs, industries seeing the steepest drops in user retention are those involving travel and crowds. Event ticketing apps have seen a more than 68% drop in Day 1 retention rates, and Day 1 retention for Ride Hailing apps is down 44%.

Interestingly, while gaming apps are seeing a rise in DAUs, Day 7 retention rates in April are down by 50% compared to February, suggesting users are churning through games quickly and moving on to new content.

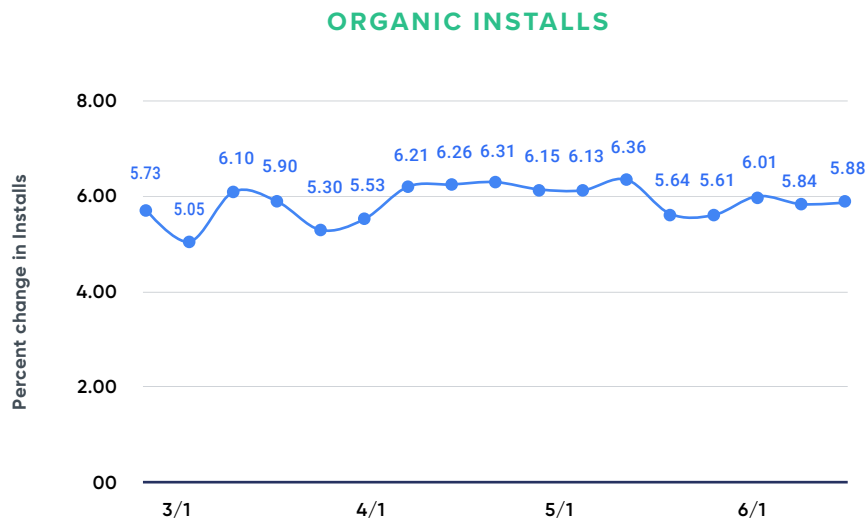
Industry Insights

Business & Finance

As lockdown orders forced more and more people to work from home, the Business & Finance industry saw a decline in app launches of up to 13.25%. Presumably, users who would have launched their apps during commutes or while running errands completed their tasks on a traditional web browser from home instead.

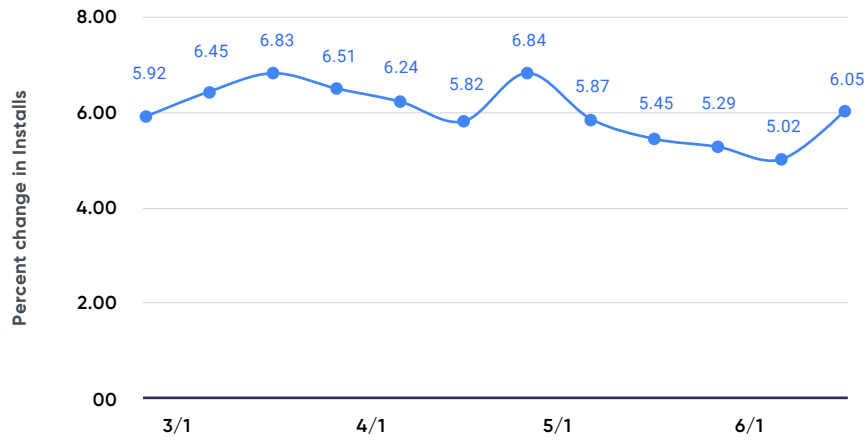
Marketers sent fewer campaigns starting in mid-March, with campaign frequency bottoming out in early April. In spite of this decrease, campaign engagement was up a promising 1.8% by the end of March.

Day 1 retention rates fell from 18% to 16% from February to April. Day 3 retention rates dropped 23%, and Day 7 retention was down by 28%. By April, the industry saw 95% of users churning within 7 days.



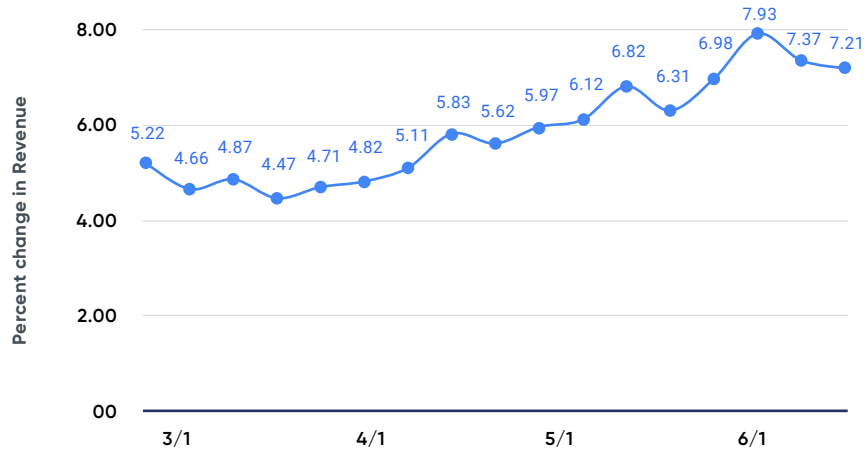
Source: AppsFlyer

NON-ORGANIC INSTALLS



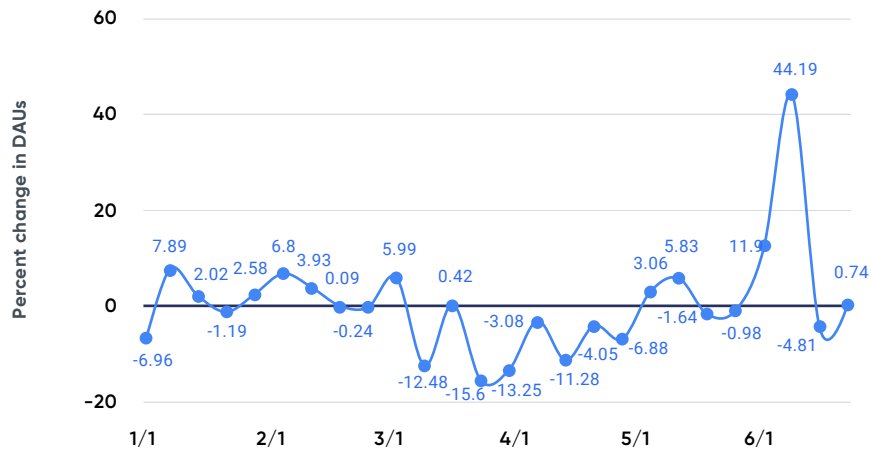
Source: AppsFlyer

MOBILE APP REVENUE

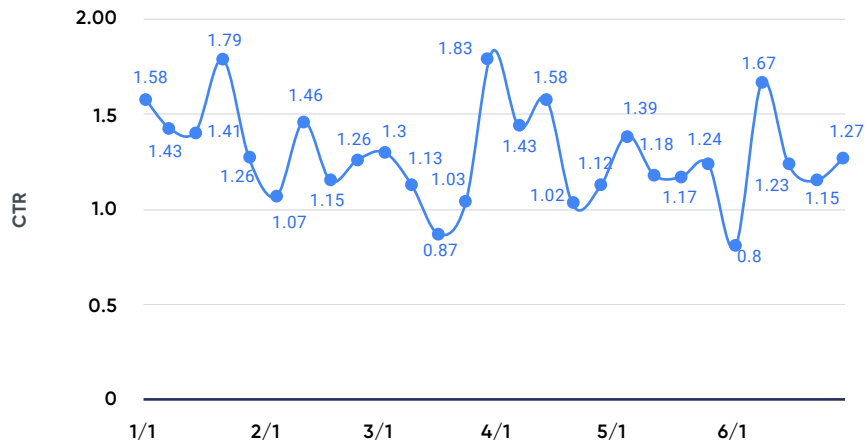


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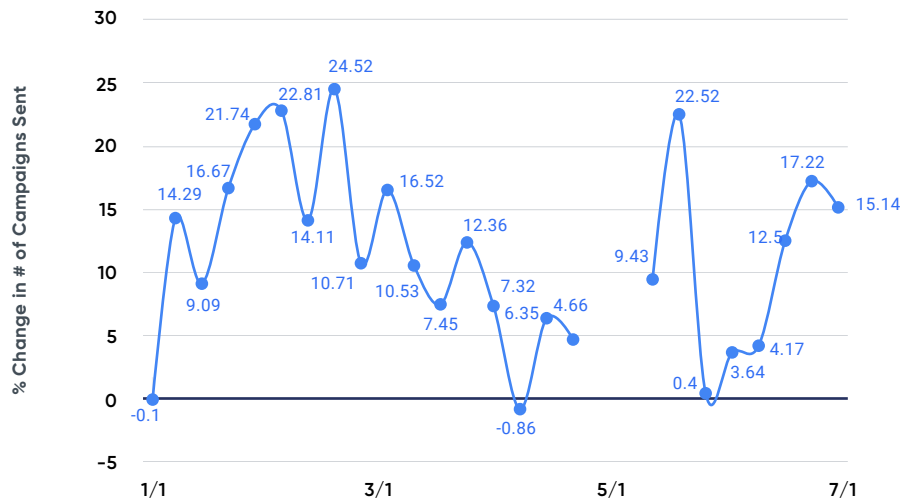
DAILY ACTIVE USERS



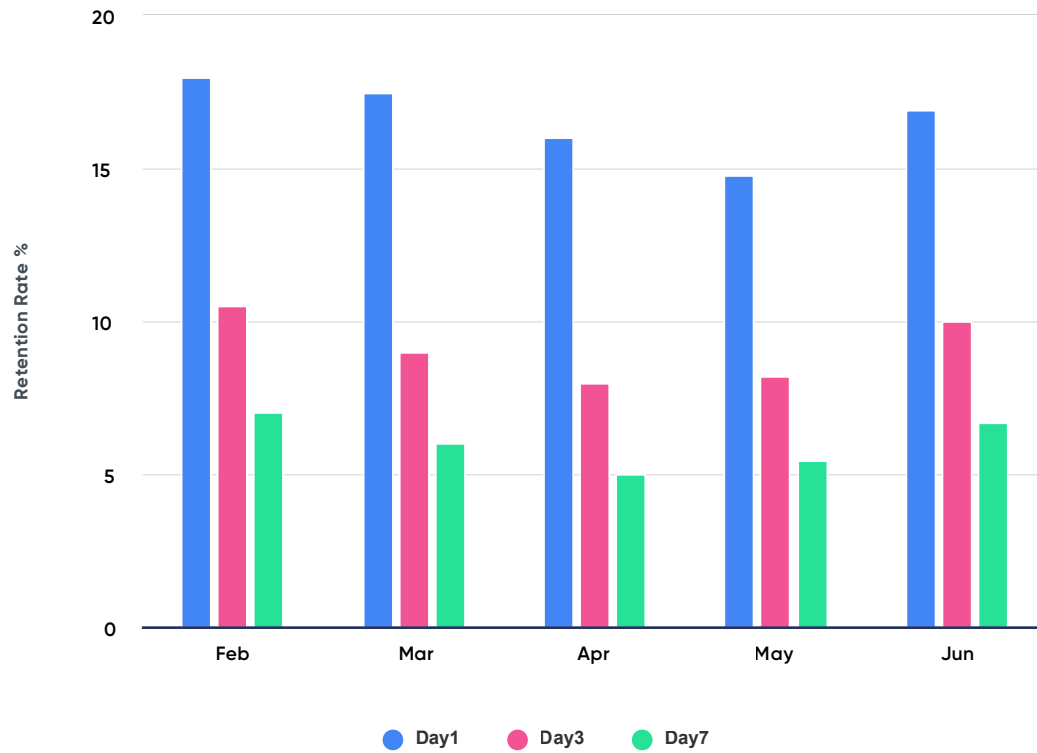
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (BUSINESS & FINANCE)



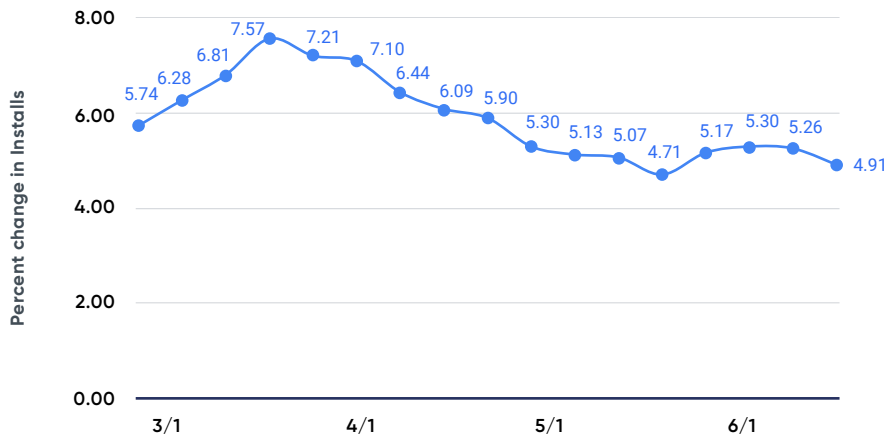
Content & Media

With one-third of the globe confined to their homes, streaming media apps have become an essential source of breaking news. Content & Media apps held steady at a 30-40% increase in DAUs through the end of March before appearing to normalize by the end of April.

Unsurprisingly, there was an increase in the number of campaigns sent starting mid-March, with a significant spike at the end of the month as marketers jump to capitalize on this rise in user interest and activity. Users responded with a corresponding 1.75% increase in CTRs through that same time period.

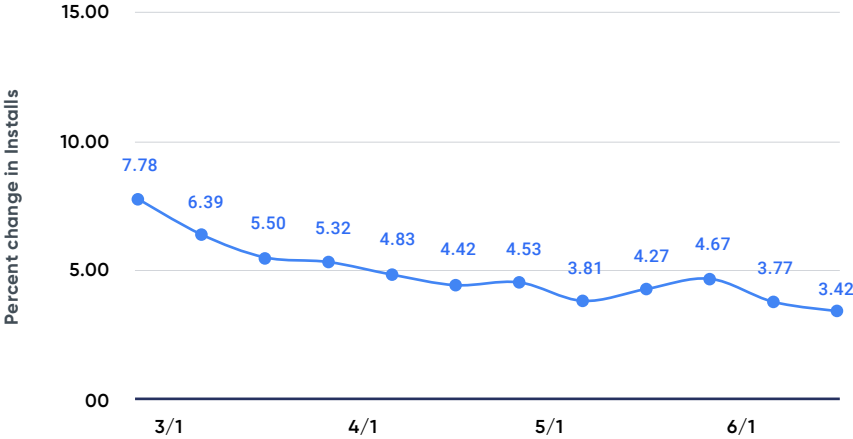
How does all this activity translate to customer retention? Day 1 retention rates are up 37%, and Day 7 retention jumped almost 70%.

ORGANIC INSTALLS



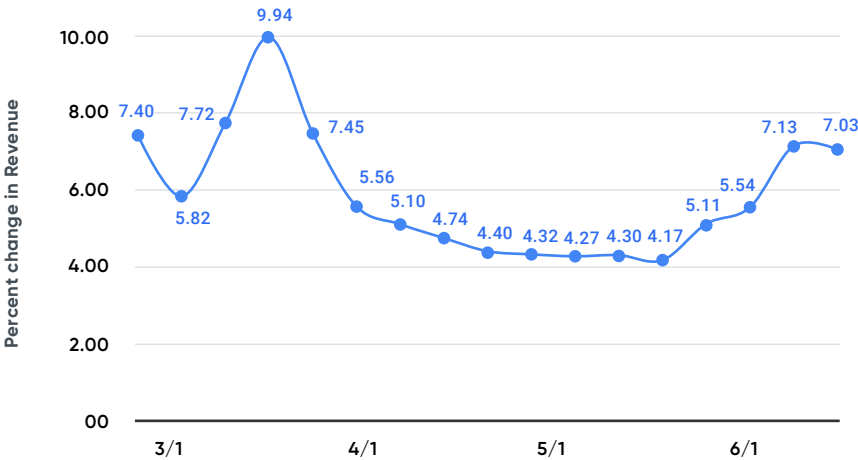
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NON-ORGANIC INSTALLS



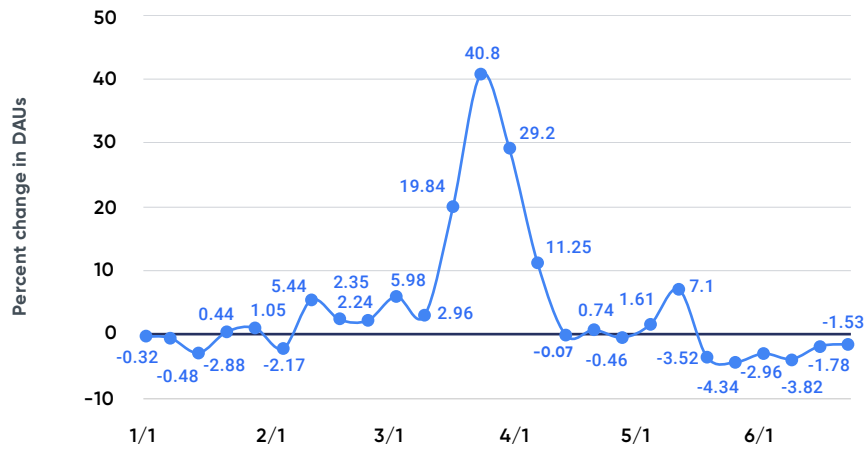
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MOBILE APP REVENUE

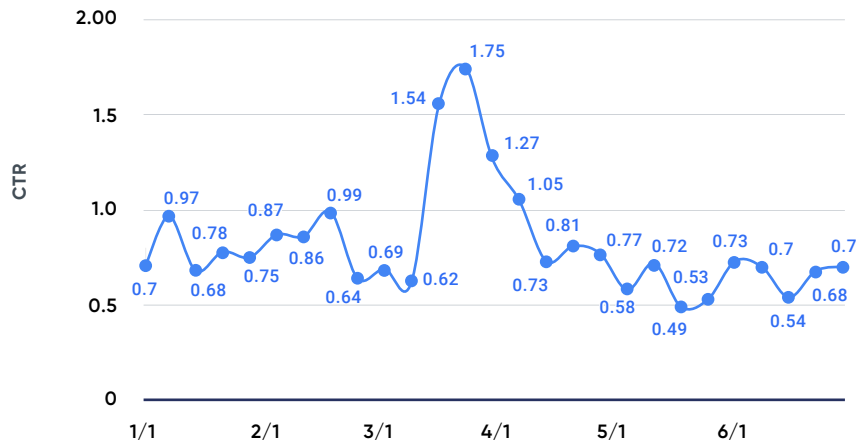


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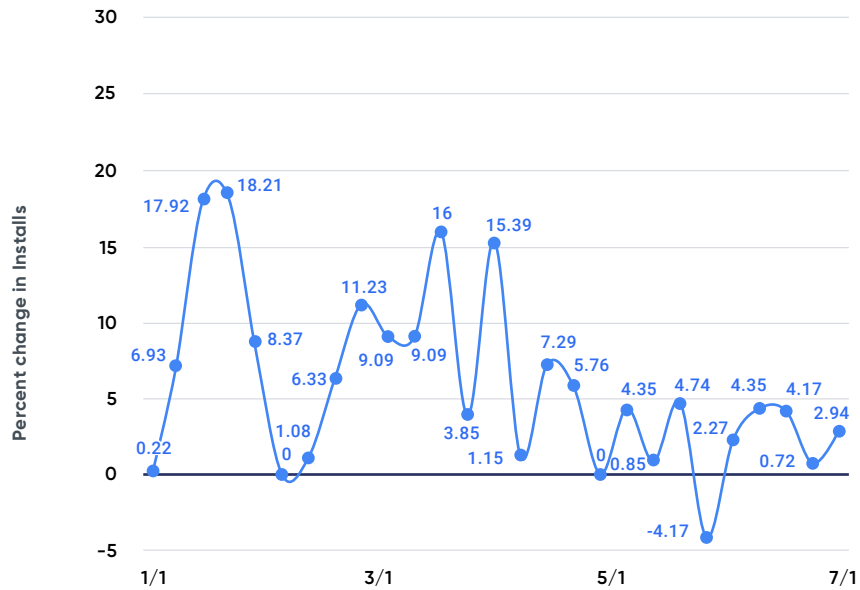
DAILY ACTIVE USERS



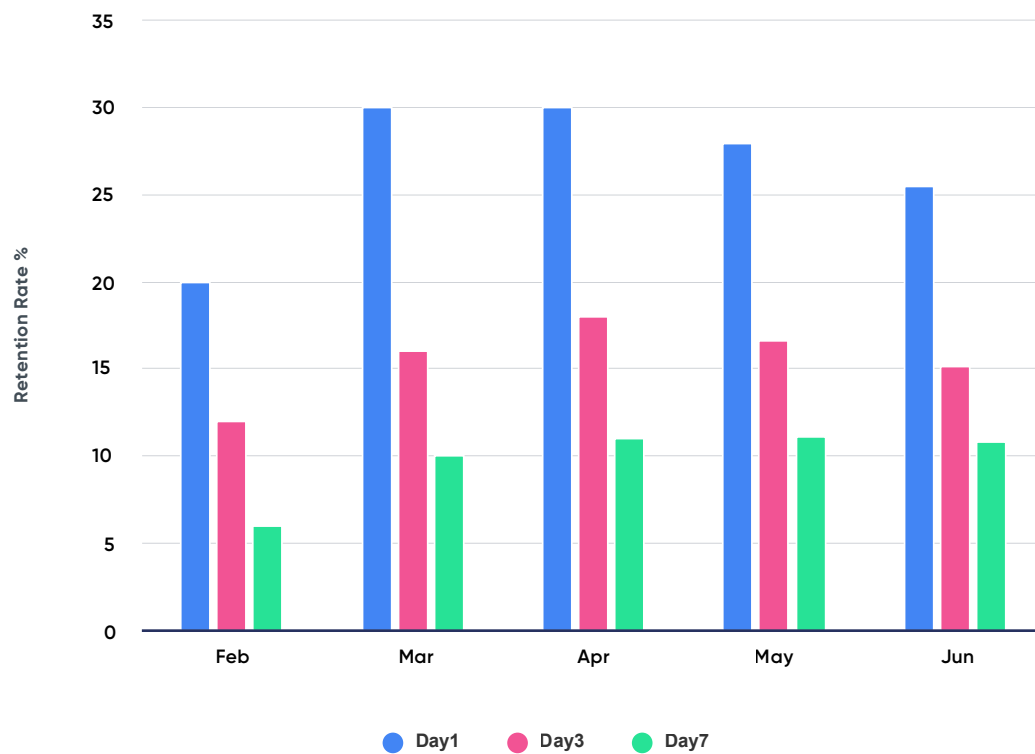
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (CONTENT & MEDIA)



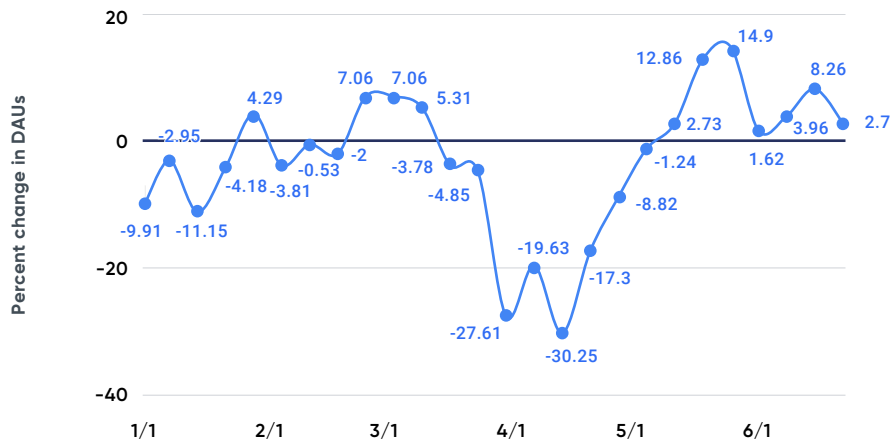
Deals & Coupons

Deals & Coupons apps have suffered from shelter-in-place orders that prevent customers from redeeming their purchases. DAUs saw a sharp decline starting March 17 as many governments issued lockdown orders.

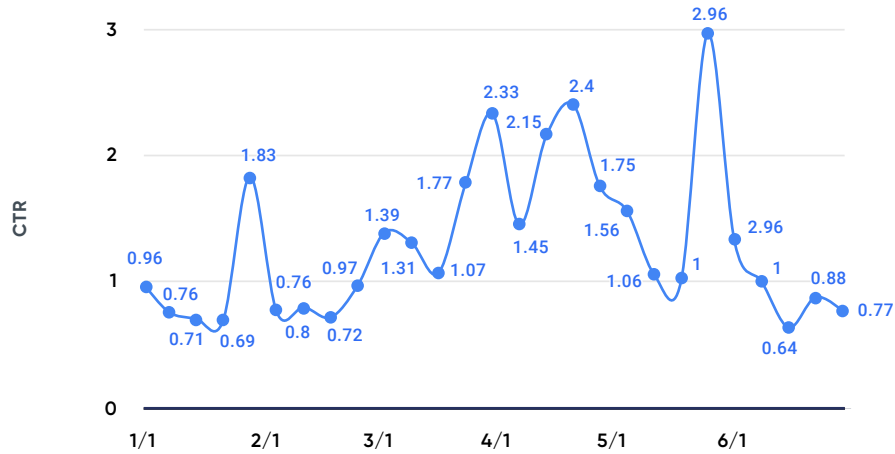
These apps sent significantly fewer marketing campaigns starting in mid-March, ending the month with 30% fewer campaigns sent. CTRs, on the other hand, rose starting March 3, rising 2.33% by the end of the month and maintaining that increase through the entire month of April.

Deals and Coupons apps still saw relatively high Day 1 retention rates of 19% by the end of Q1. However, Day 7 churn rates rose by over 68% from February to April, as apps are retaining just 3.5% of users after 1 week.

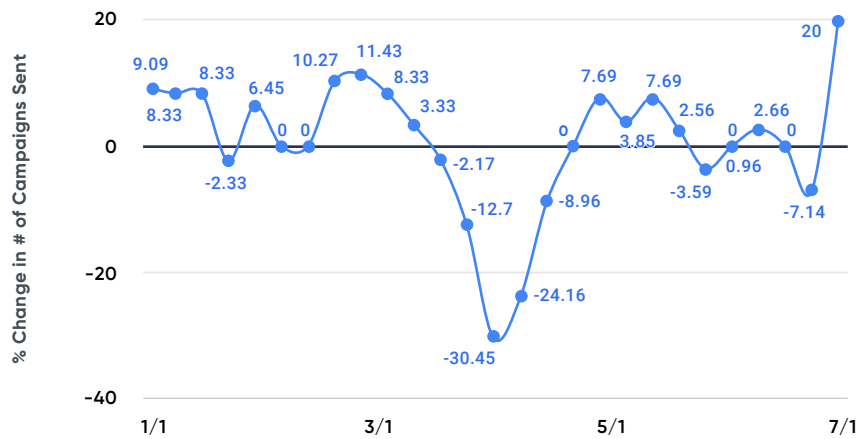
DAILY ACTIVE USERS



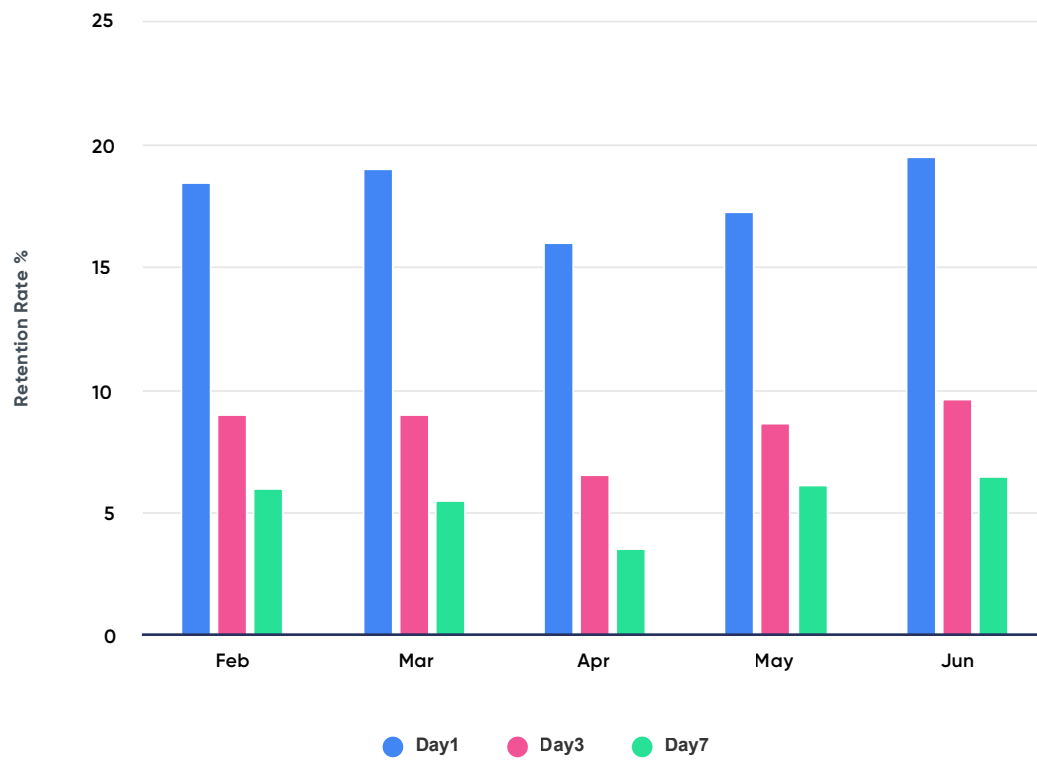
PUSH NOTIFICATION CTRS



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (DEALS & COUPONS)

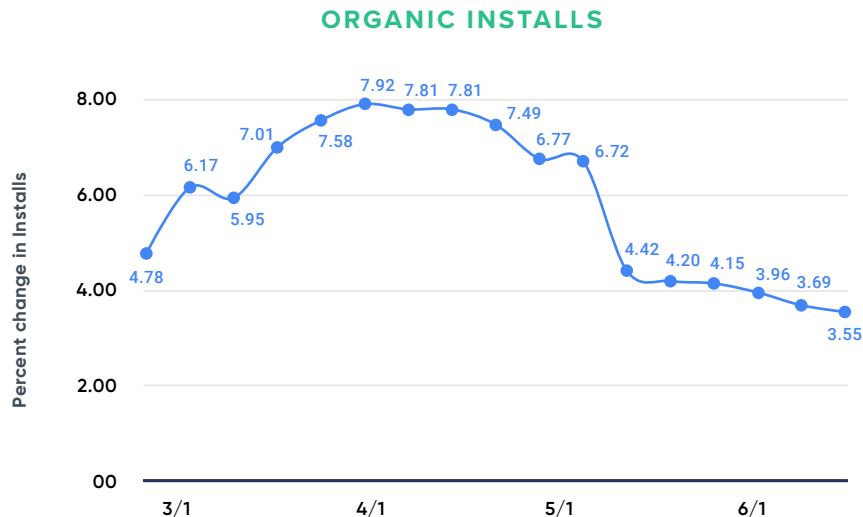


Education

Online learning is undergoing a significant transformation as COVID-19 forces students around the world off-campus and into virtual classrooms. Parents are overseeing their children's homeschooling, people are taking the opportunity to pick up new skills and hobbies, and learners are looking for new resources and ideas. It's no surprise that Education apps are seeing a significant rise in app launches - up nearly 20% before seeing a decline at the end of March.

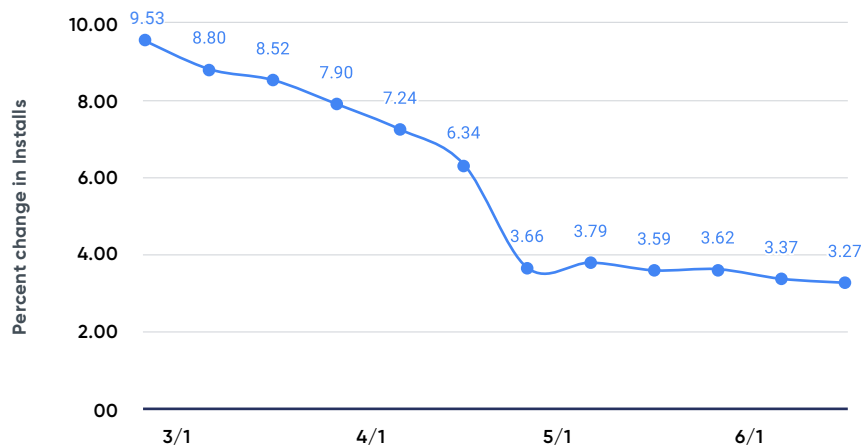
Education apps are generally sending more campaigns, at times a more than 20% increase in the number of campaigns sent. In spite of this flurry of activity, however, marketers have seen a general decline in CTRs , from a high in early January to its lowest level at the end of April.

Retention rates for Education apps held fairly steady through February and March, seeing a slight dip in April of 2% across Day 1, Day 3, and Day 7 retention rates.



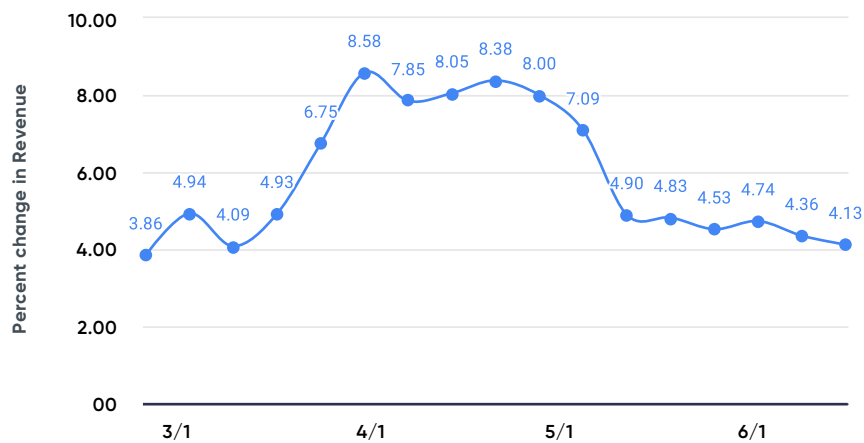
Source: AppsFlyer

NON-ORGANIC INSTALLS



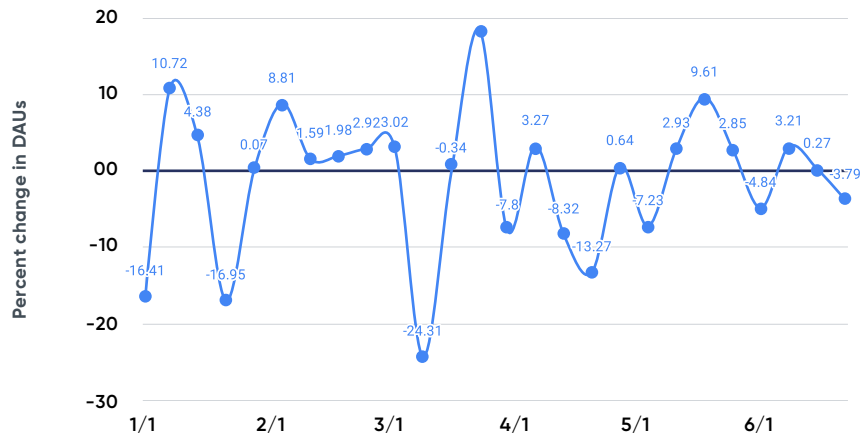
Source: AppsFlyer

MOBILE APP REVENUE

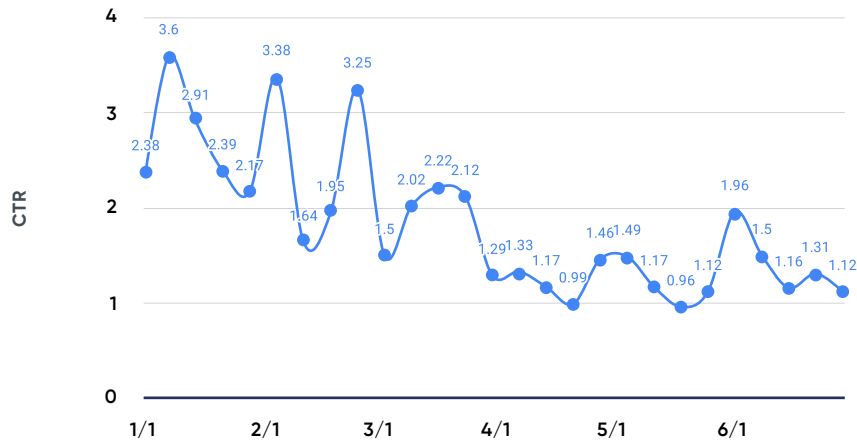


Source: AppsFlyer

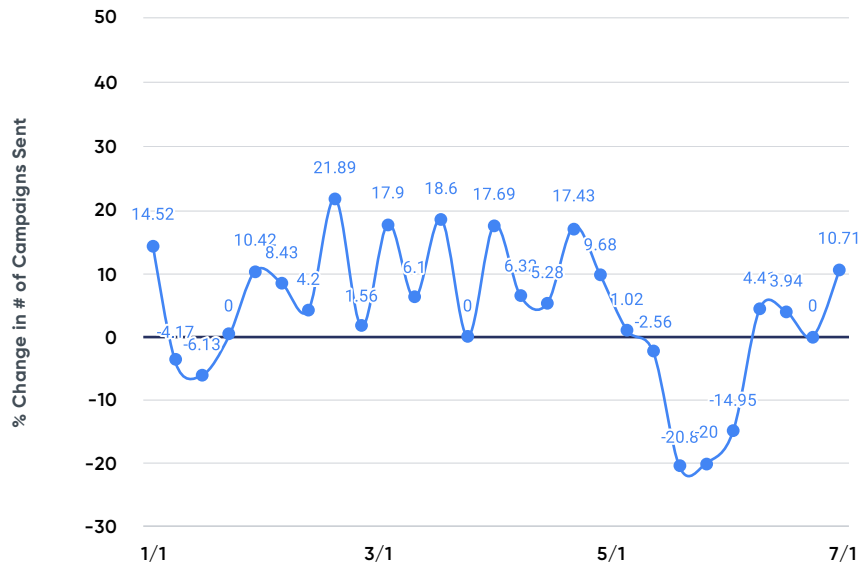
DAILY ACTIVE USERS



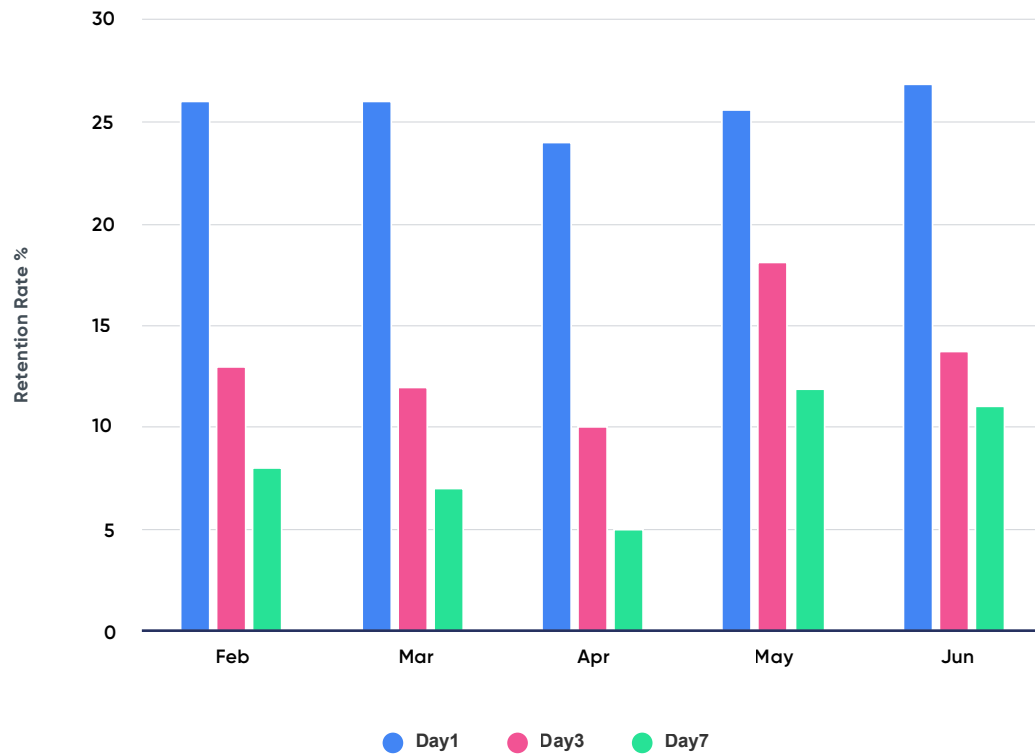
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (EDUCATION)



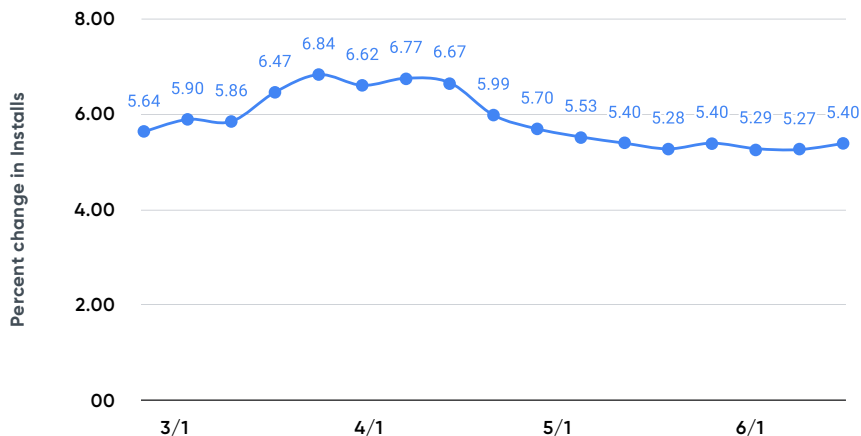
Entertainment

Like Content & Media apps, Entertainment apps saw a jump in engagement as isolated users looked for new sources of distraction and social connection. At the end of March, average DAUs were up over 20% from 15 days previous. Case in point: [Netflix's *Tiger King* was watched by 34.3 million unique viewers in just the first 10 days of release in the US.](#)

Interestingly, campaign activity saw major fluctuations: at times up over 13% and at others down nearly 10%. CTRs remained fairly steady, however, up between 0.5-1% regardless of the number of campaigns sent.

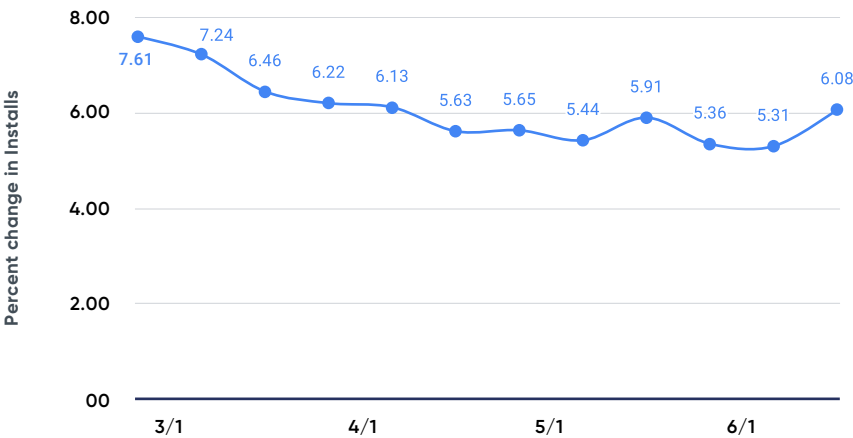
Entertainment apps have enjoyed a rise in retention rates: Day 1 retention rose to 22.5% - a 32% increase over February.

ORGANIC INSTALLS



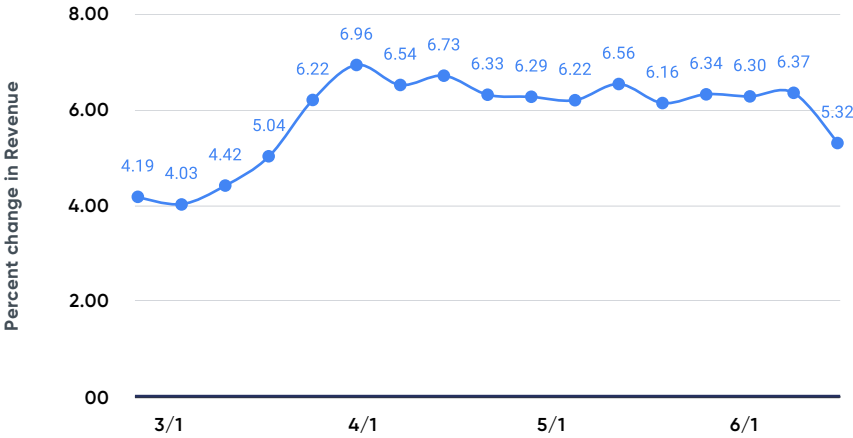
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NON-ORGANIC INSTALLS



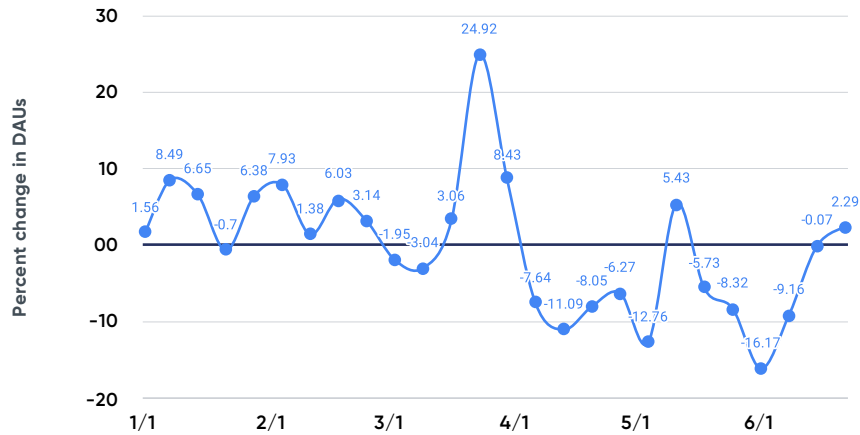
Source: AppsFlyer

MOBILE APP REVENUE

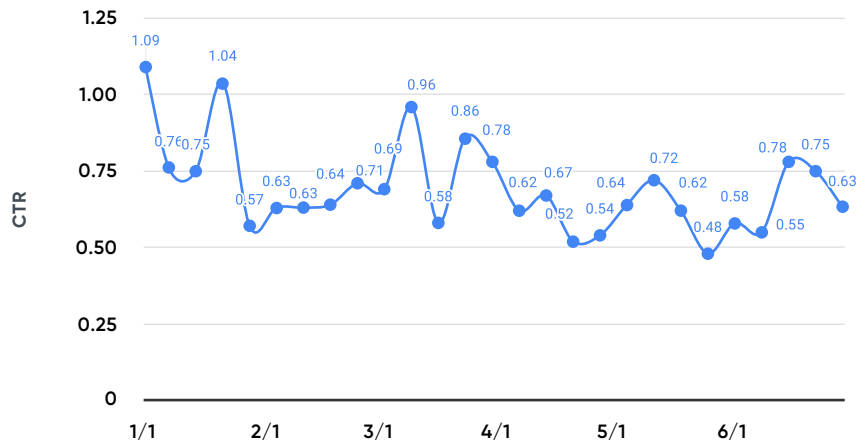


Source: AppsFlyer

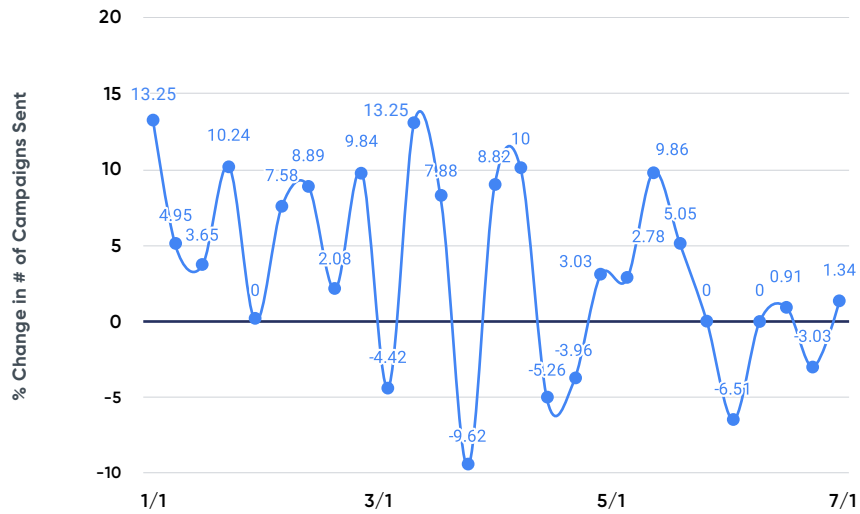
DAILY ACTIVE USERS



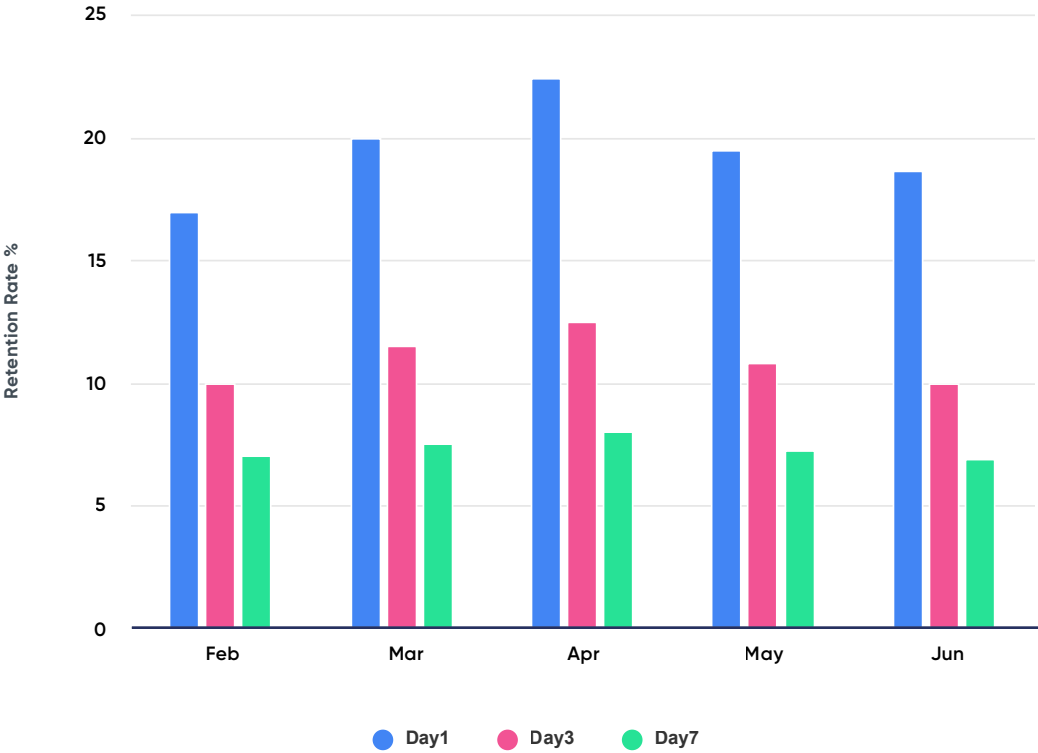
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (ENTERTAINMENT)



Event Ticketing

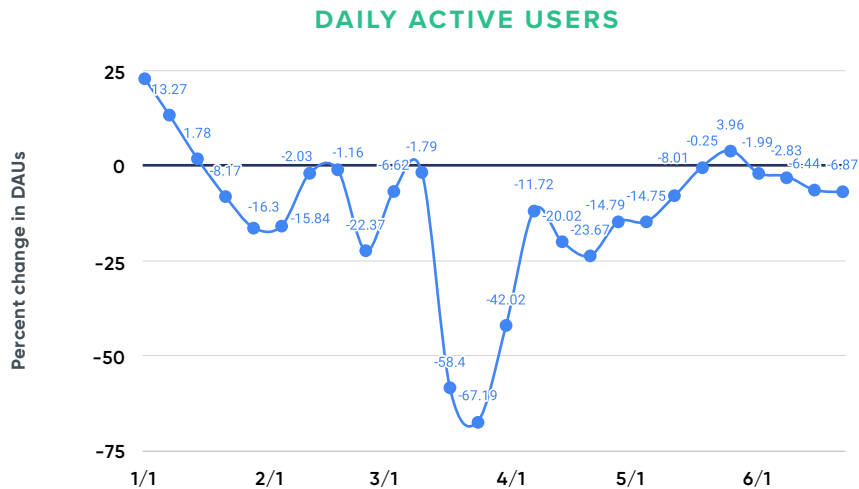
Bans on public gatherings have put a halt to all kinds of events, from sports to concerts. Event Ticketing apps saw a decline in DAUs of nearly 70% by the end of March.

In response, Event Ticketing apps hit a major pause button on campaigns, likely as marketers attempted to regroup and refocus their strategies to attract the attention of homebound customers. They sent nearly 70% fewer campaigns by the beginning of April. Users have been responsive to these campaigns, however, with CTRs generally up 1-2%.

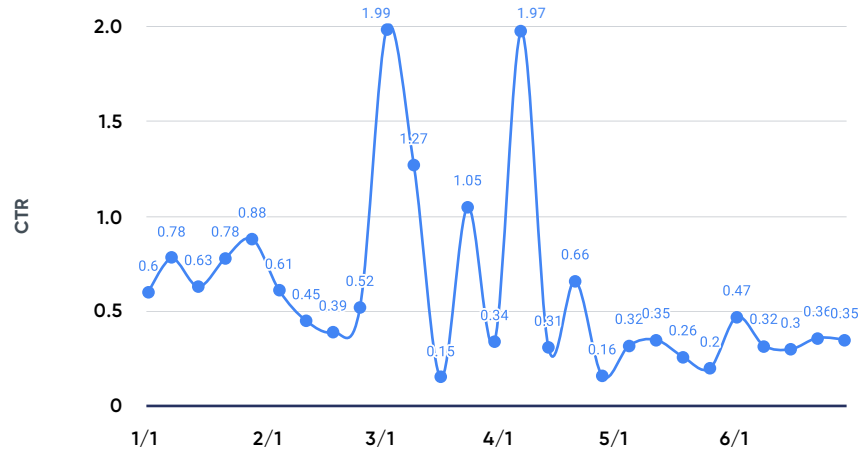
Compared to February, Event Ticketing apps have seen:

- **68% decrease in Day 1 Retention**
- **71% decrease in Day 3 Retention**
- **80% decrease in Day 7 Retention**

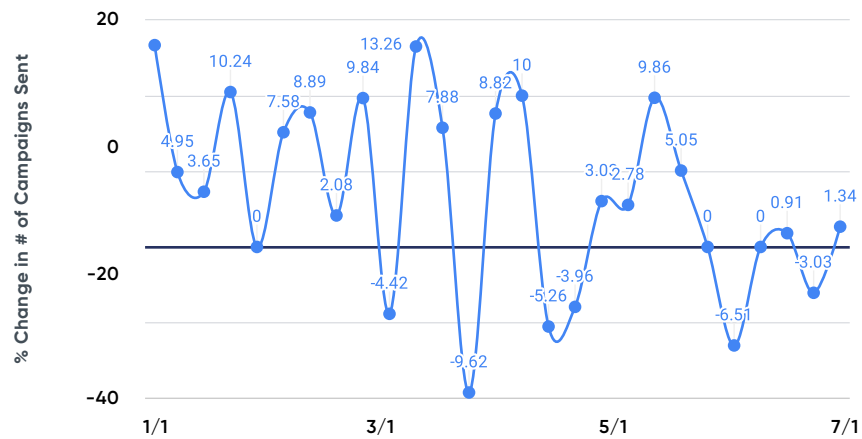
In the month of April, the industry retained just 1% of users after 7 days.



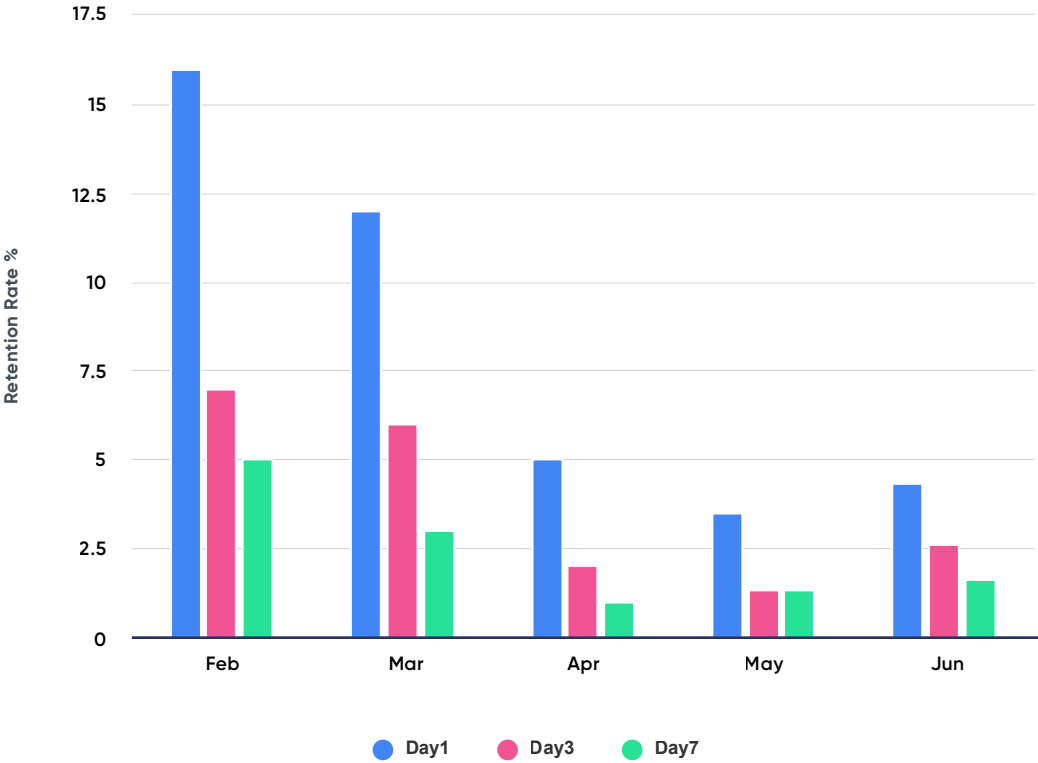
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (EVENT TICKETING)



Food & Delivery

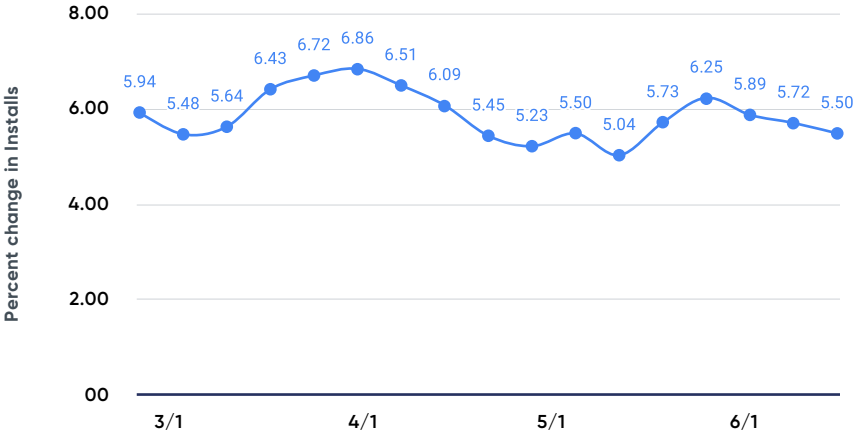
Food & Delivery apps have seen a precipitous drop in engagement, but have since shown signs of recovery. After dropping over 40% on March 25, app launches have since risen - down just 4.7% from 15 days previous on March 28.

One possibility: customers who were previously unsure about the safety of eating prepared food were reassured as more information came out about viral transmission, resuming take out/delivery orders. Another possibility: customers either ran out of groceries or got tired of cooking for themselves as shelter-in-place orders were extended.

Food & Delivery apps saw a significant dip in marketing activity starting in the middle of March and continuing through the month of April, sending 23% fewer campaigns as lockdown orders were issued globally. CTRs have remained fairly constant, with a temporary spike near the end of March.

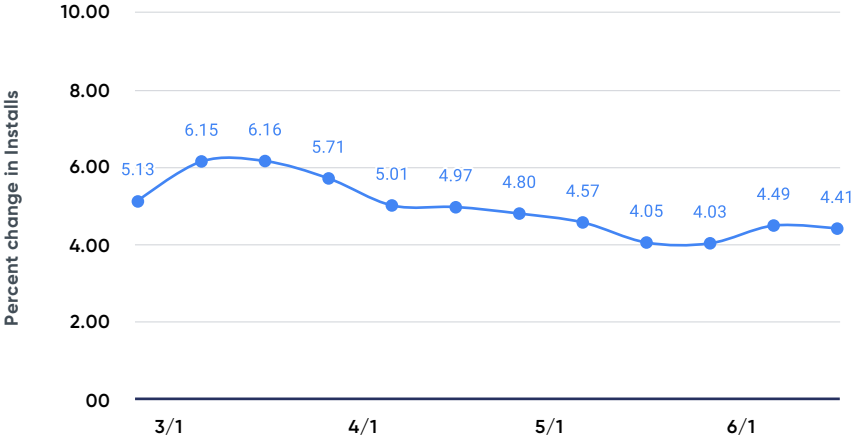
The good news for Food & Delivery apps: retention is on the rise: a 54% increase in Day 1 retention, an 80% increase in Day 3 retention, and a 50% increase in Day 7 retention by the end of April.

ORGANIC INSTALLS



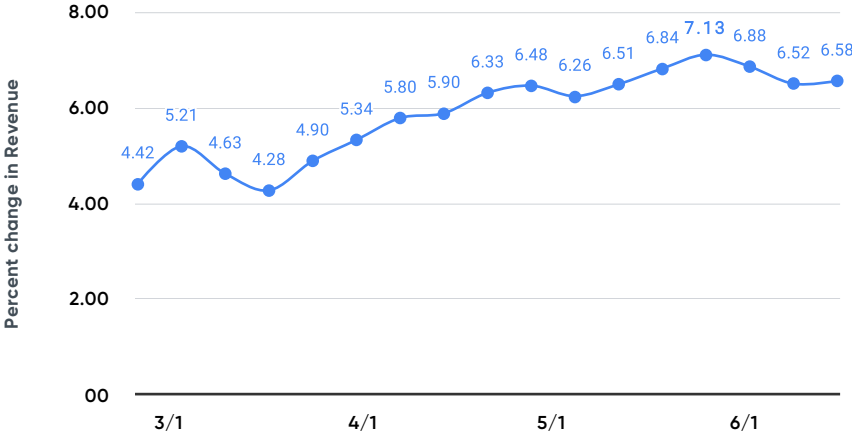
Source: AppsFlyer

NON-ORGANIC INSTALLS



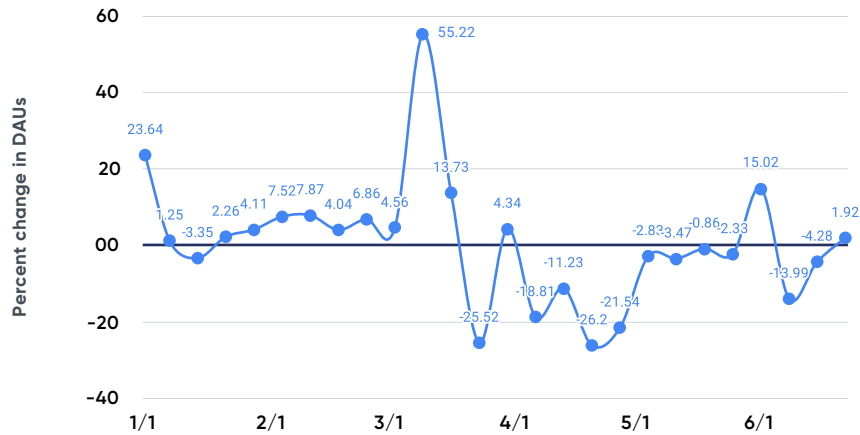
Source: AppsFlyer

MOBILE APP REVENUE

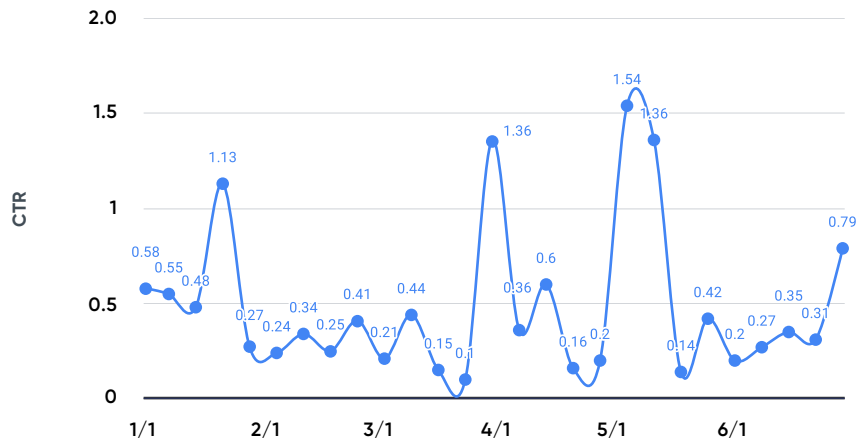


Source: AppsFlyer

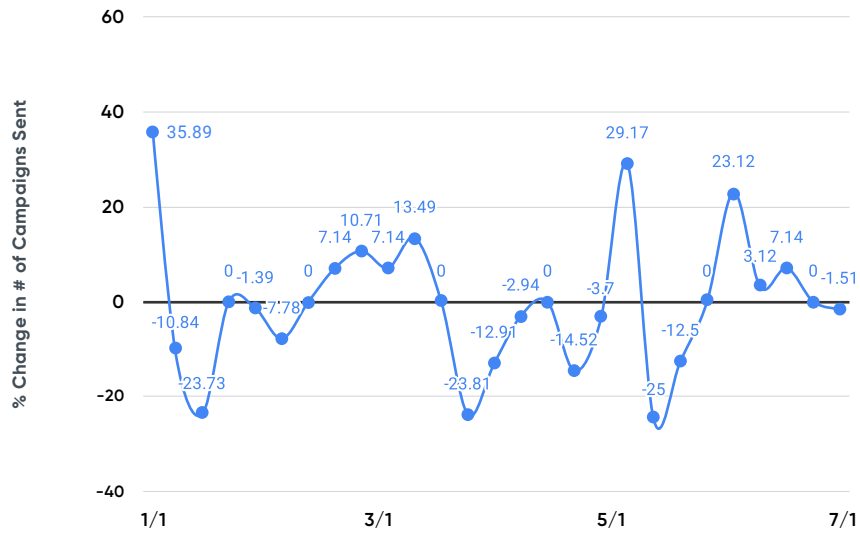
DAILY ACTIVE USERS



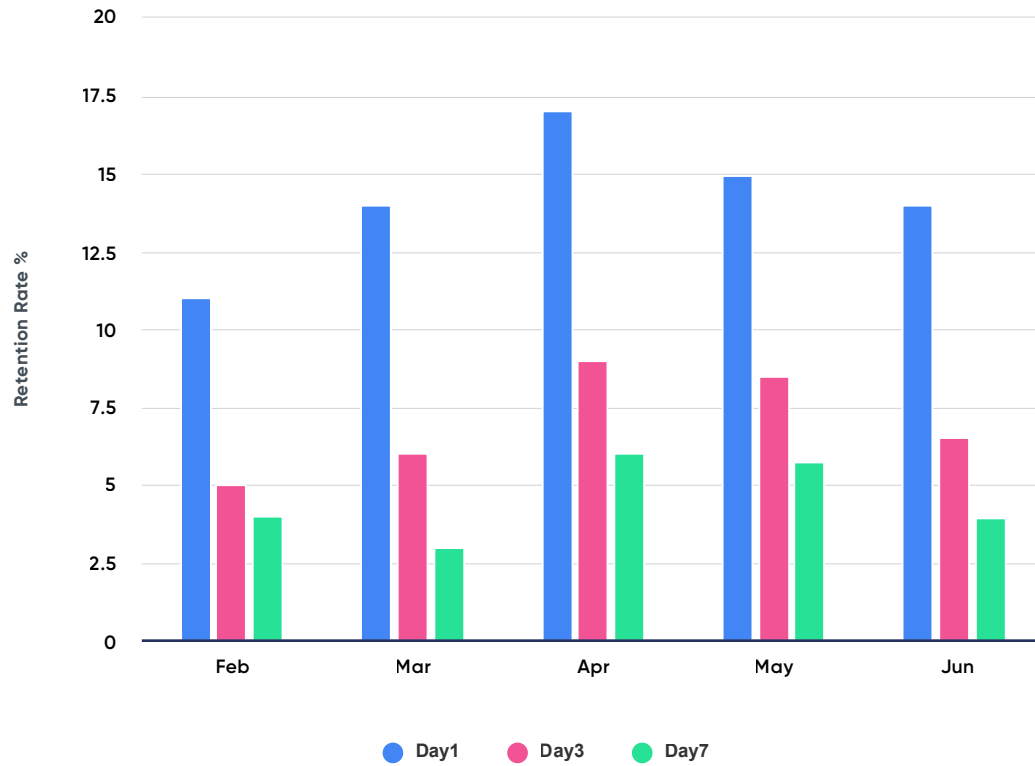
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (FOOD & DELIVERY)



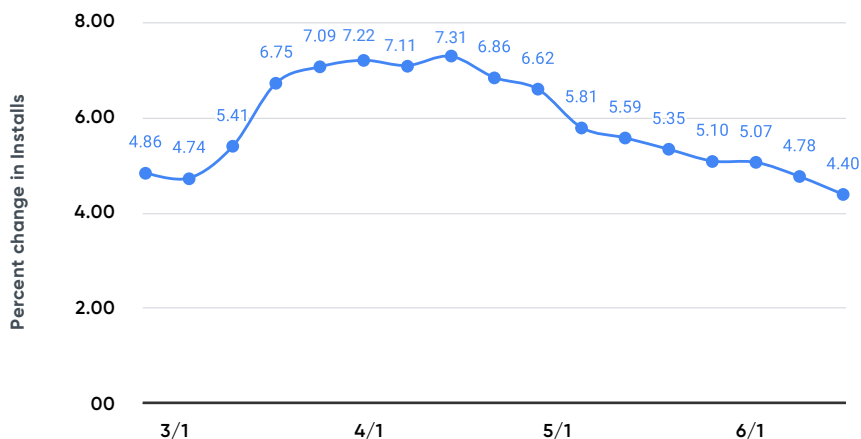
Gaming

Gaming apps saw a constant increase in app launches throughout the month of March, signaling that users aren't experiencing [app fatigue](#) and are in fact turning to mobile games more and more as a way to connect with friends and entertain themselves as they self-isolate.

Gaming apps are enjoying the attention of users who have suddenly found an influx of free time to fill, and are taking advantage by sending a higher number of campaigns than usual. By early April, campaign volume was up nearly 30%, and CTRs were on the rise as well.

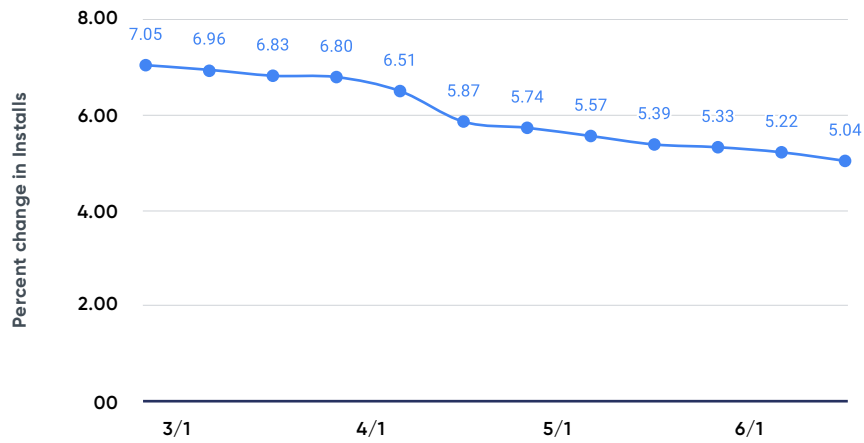
While gaming apps have seen a rise in DAUs, Day 7 retention rates in April were down by 50% compared to February, and Day 1 retention rates fell from 25% to 15.5% over the 3-month span.

ORGANIC INSTALLS



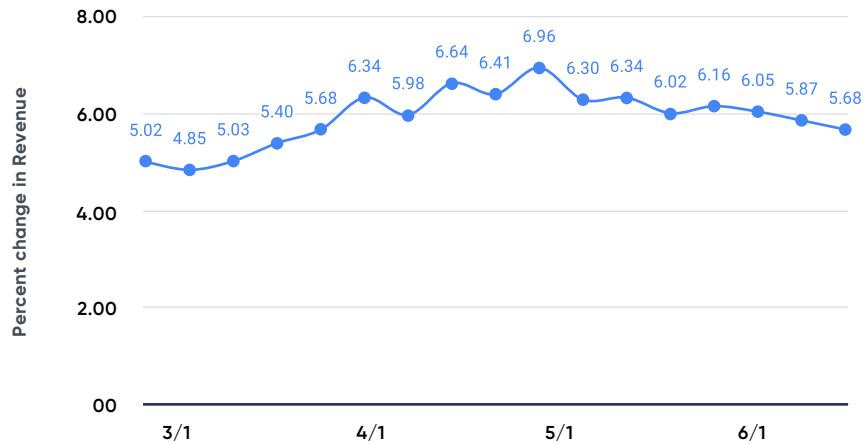
Source: AppsFlyer

NON-ORGANIC INSTALLS



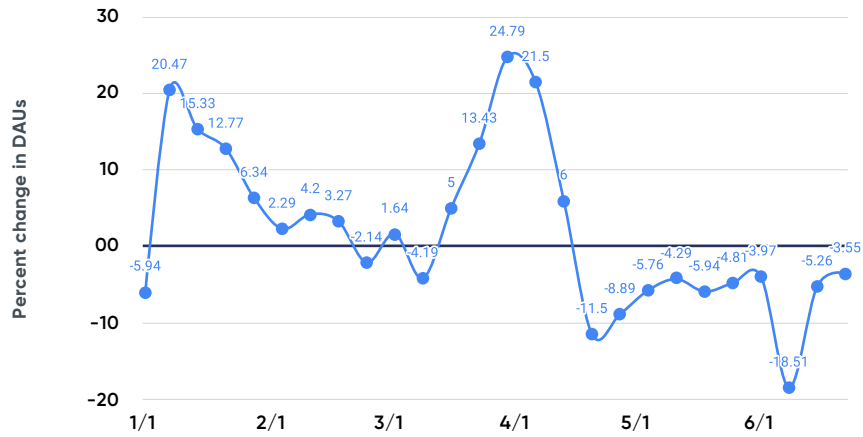
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MOBILE APP REVENUE

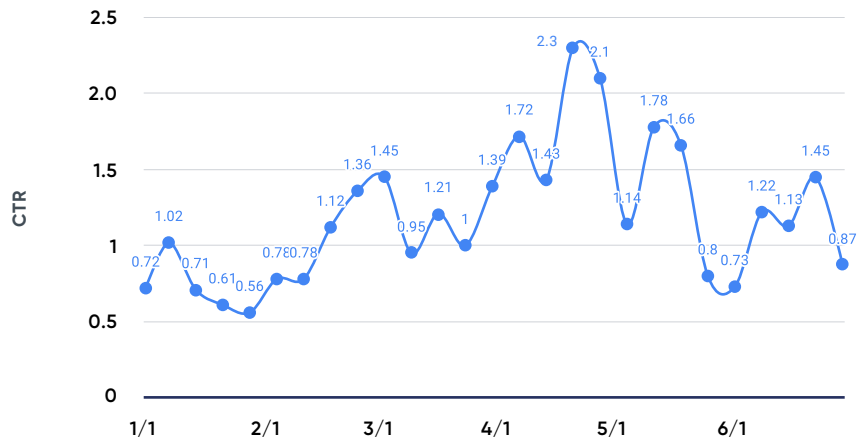


Source: AppsFlyer

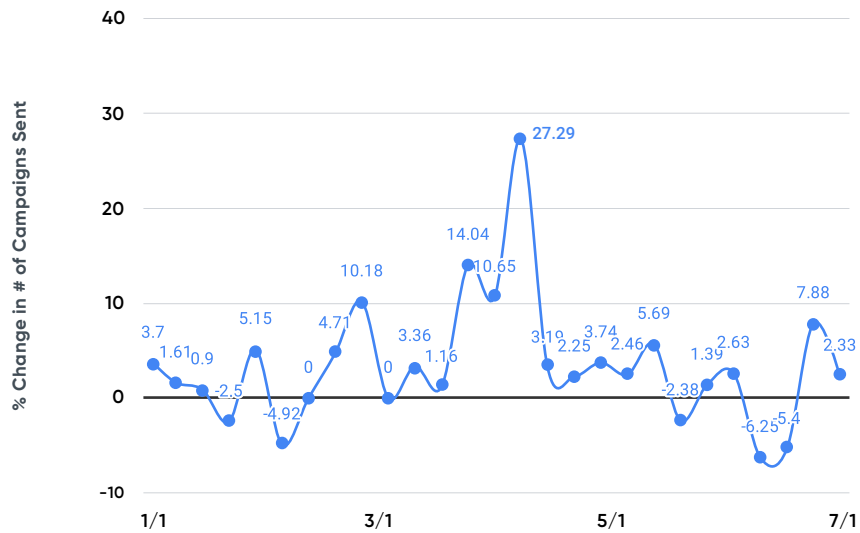
DAILY ACTIVE USERS



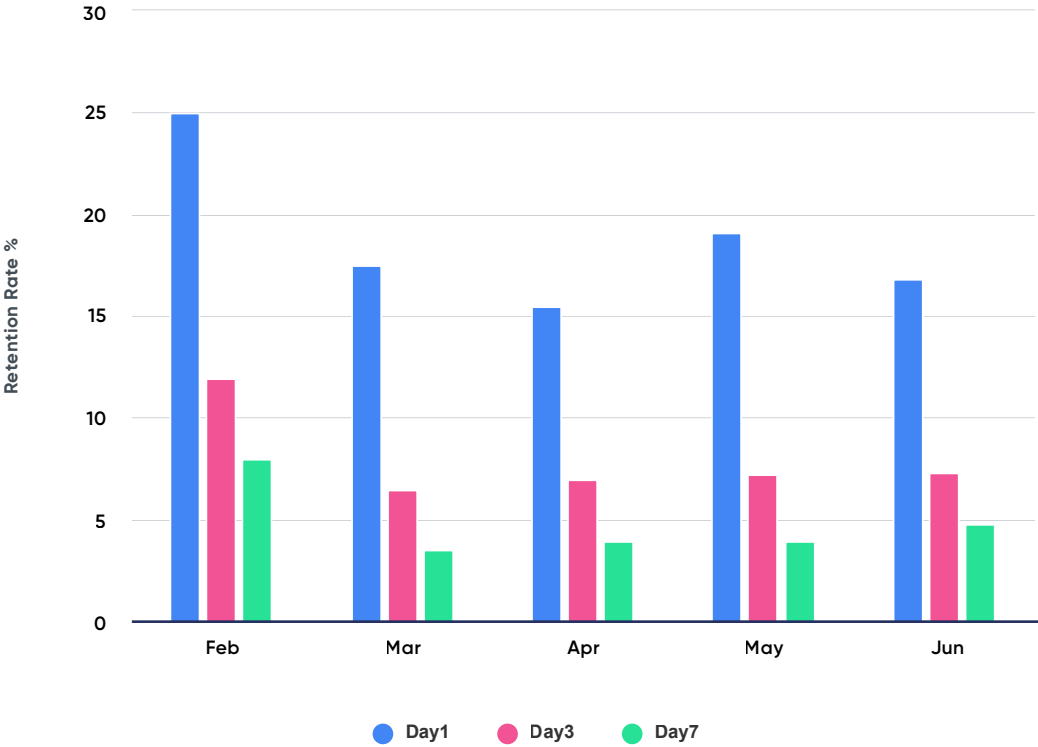
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (GAMING)



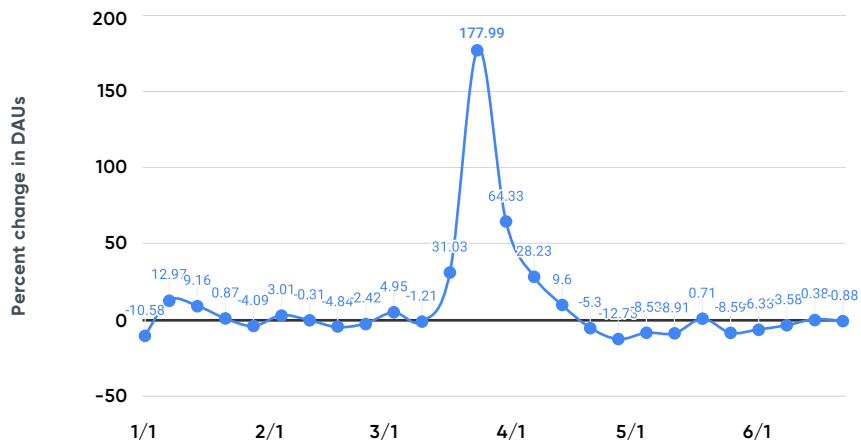
Grocery

Unlike Food & Delivery apps, Grocery apps have seen a dramatic increase in DAUs during the month of March as governments around the world issued lockdown orders. App launches were up 177% on March 24 as consumers scrambled to secure supplies and prepared to shelter in place.

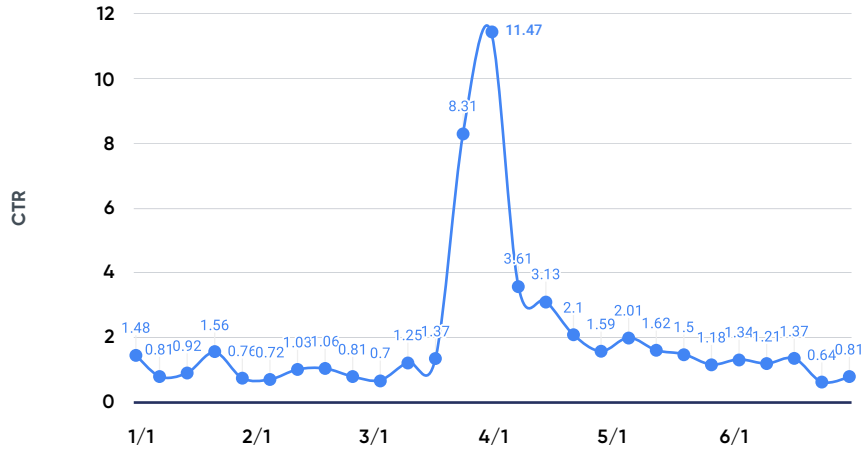
In spite of seeing an influx of app launches, Grocery apps did not immediately respond with a flurry of campaign activity. In fact, these apps sent between 30-60% fewer campaigns from mid-March to early April. Only at the end of April did they start to ramp up marketing activity, but they did it in a big way - with campaign volume up more than 75%. In spite of sending fewer campaigns, Grocery apps saw a significant jump in engagement, with CTRs up 11.47% at the end of March.

Along with DAUs and CTRs, retention rates are up for Grocery apps. Day 1 retention jumped nearly 8% in March and Day 7 retention nearly doubled. In April, retention for Day 1 was 20%, Day 3 was 10.5%, and Day 7 was 7.5%.

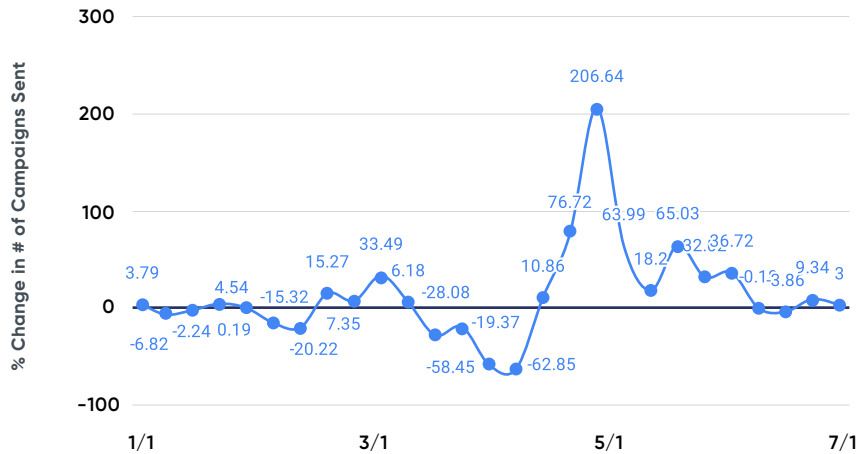
DAILY ACTIVE USERS



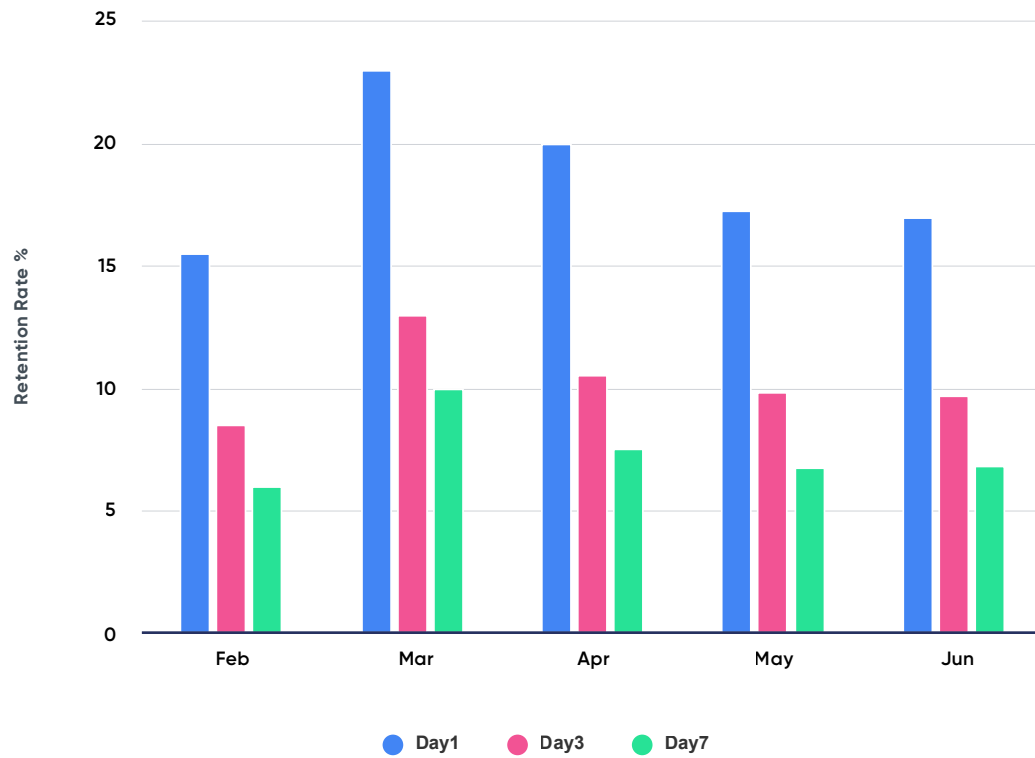
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (GROCERY)



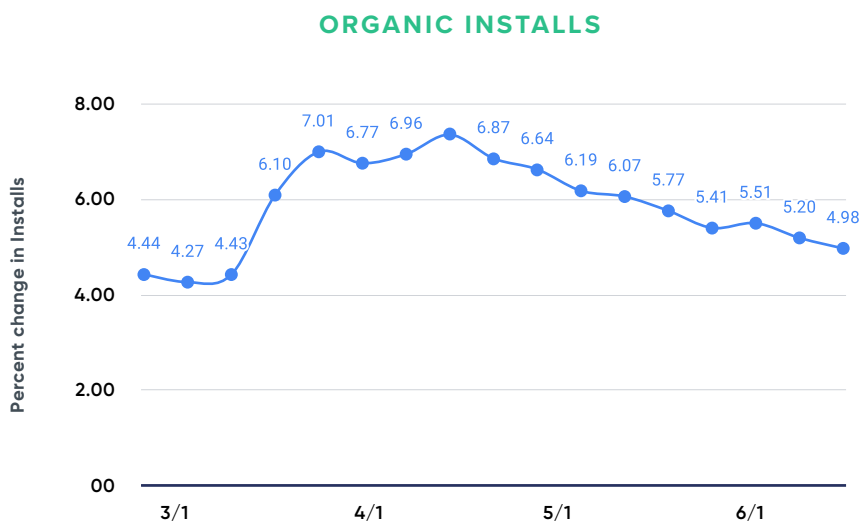
Health & Fitness

With gyms closed, athletes are turning to their Health & Fitness apps to help them stay active indoors (and log all their quarantine snacks). As a result, apps have seen swings in DAUs, but ended the month of March up 13% from 15 days previous.

[Nike’s “Play Inside - Play for the World” campaign](#) is just one example of health and fitness brands finding ways to encourage athletes to access their library of digital workouts and connect with the athletic community via their mobile apps.

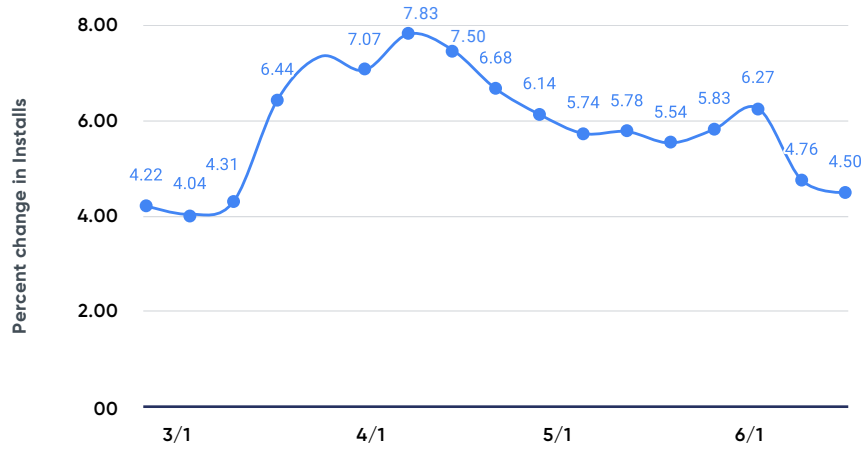
Health & Fitness apps are attempting to engage quarantined users by sending more campaigns, up 13% by the end of April. In general, their efforts have seen some success: campaign engagement rose 3.66% in mid-March.

Retention rates for this industry remained fairly constant, wavering 2% or less across Day 1, Day 3, and Day 7 for all of February to April.



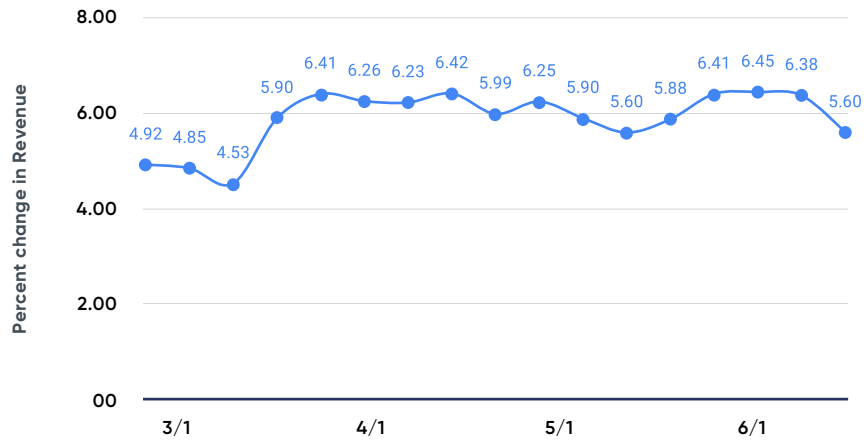
Source: AppsFlyer

NON-ORGANIC INSTALLS



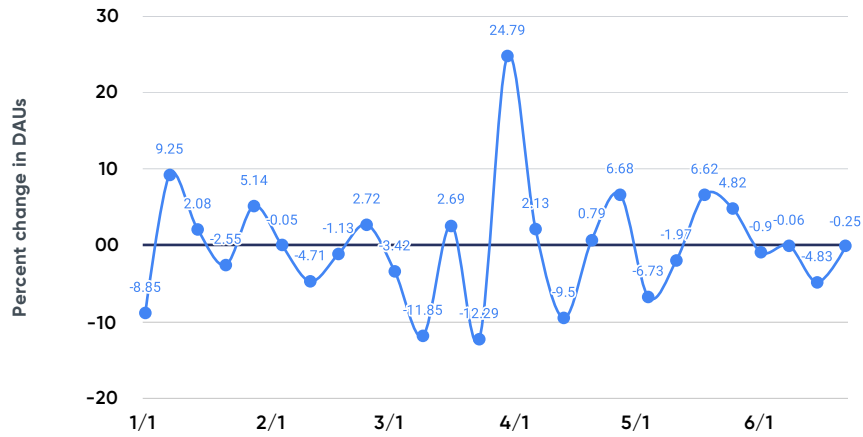
Source: AppsFlyer

MOBILE APP REVENUE

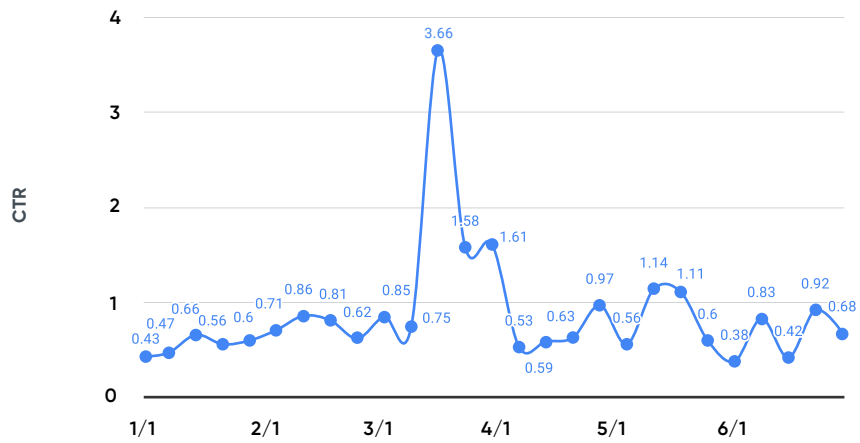


Source: AppsFlyer

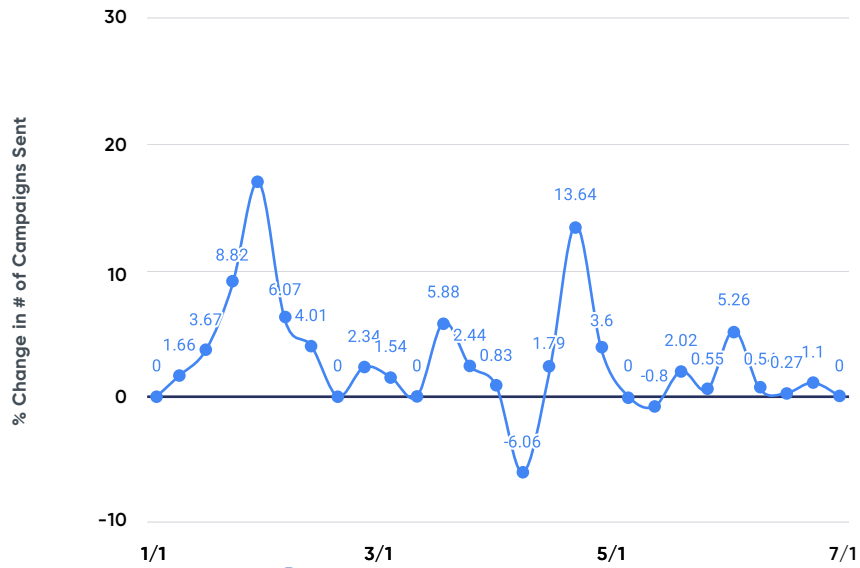
DAILY ACTIVE USERS



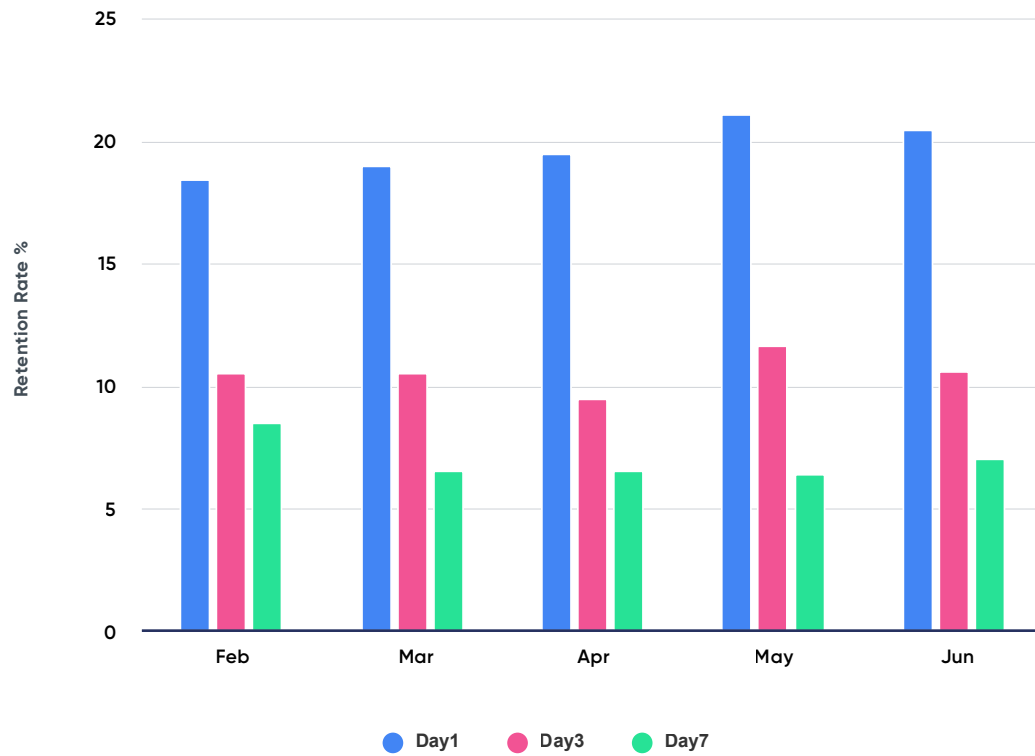
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (HEALTH & FITNESS)

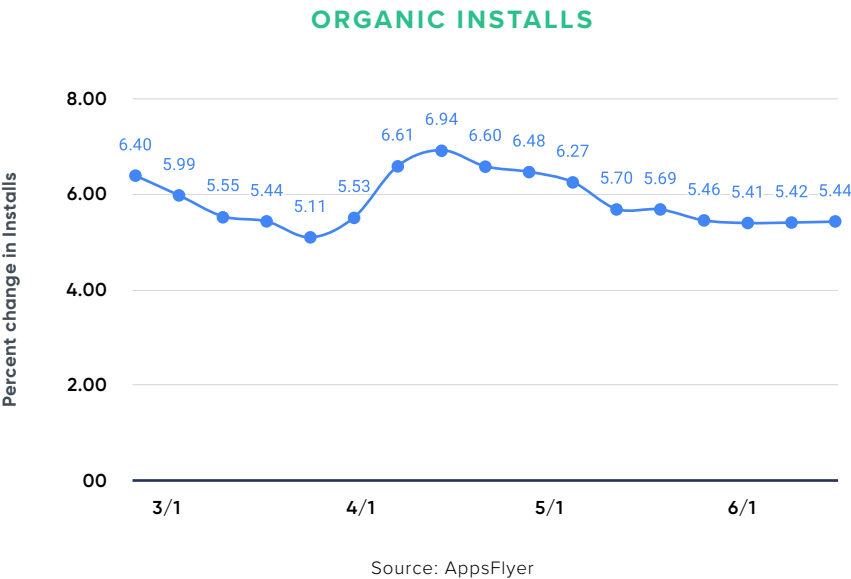


Lifestyle

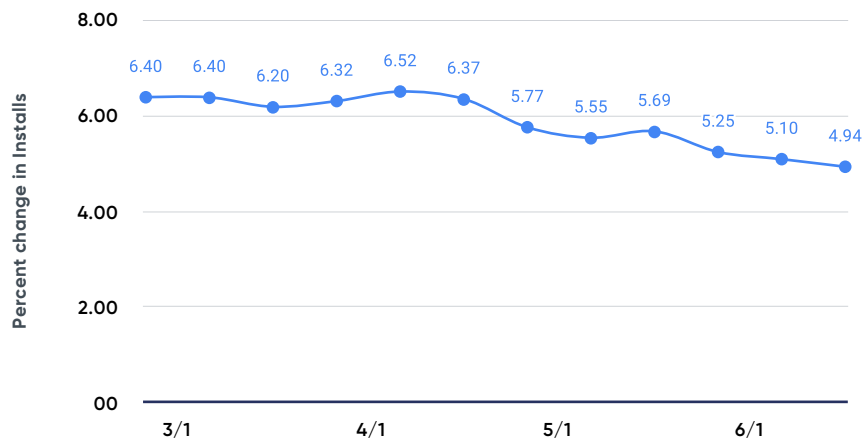
After enjoying a peak in app launches around the holidays, Lifestyle apps saw a major decline in user activity towards the end of Q1. App launches were down around 20% by the end of April.

In addition to seeing a dip in app launches, Lifestyle apps sent fewer marketing campaigns. Starting in mid-March there was a 14% drop in campaign activity, plummeting to a 27% drop by April 1. However, marketing ramped up significantly towards the end of April, closing out the month with a 37% increase in campaigns sent. CTRs haven't been much influenced by this activity, however, remaining fairly constant around 2% throughout March and April.

Retention rates are similarly on a downward trend, with Day 1 retention falling by over 30%, Day 3 retention down by 45%, and Day 7 retention down nearly 43% from February to April.

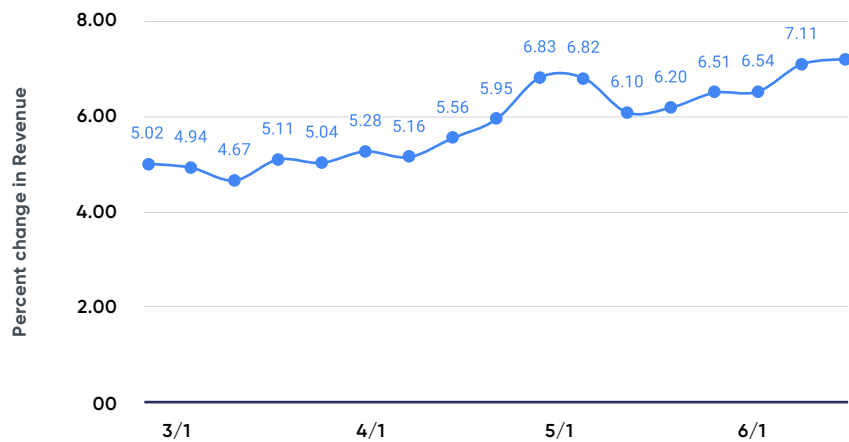


NON-ORGANIC INSTALLS



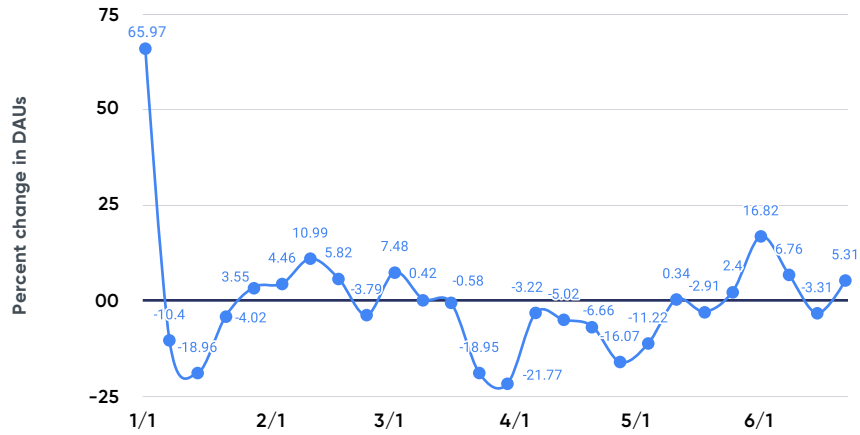
Source: AppsFlyer

MOBILE APP REVENUE

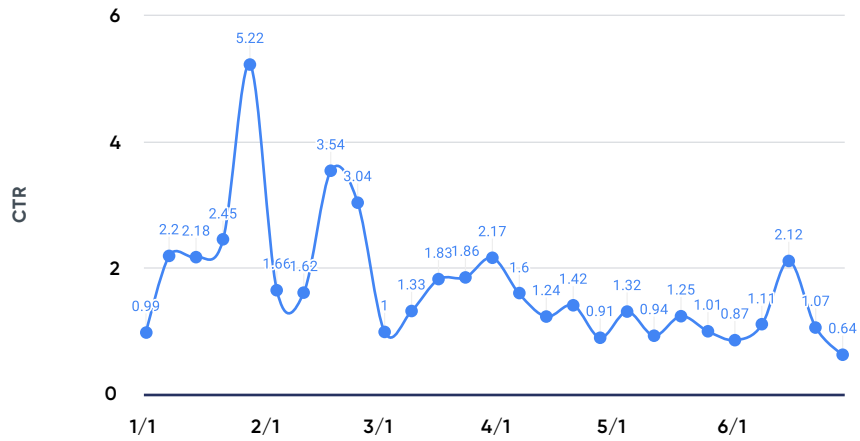


Source: AppsFlyer

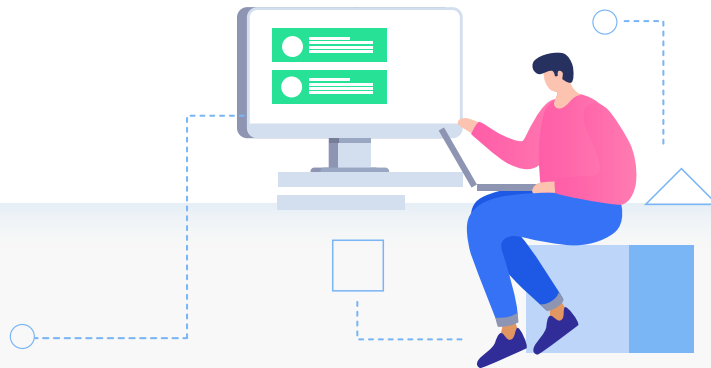
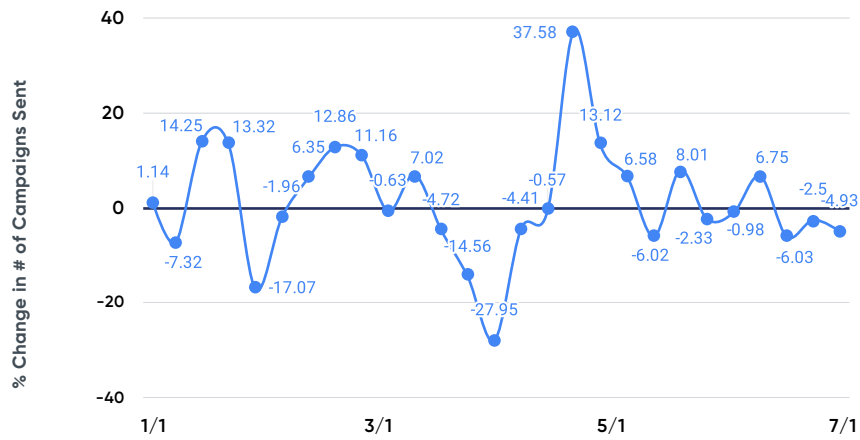
DAILY ACTIVE USERS



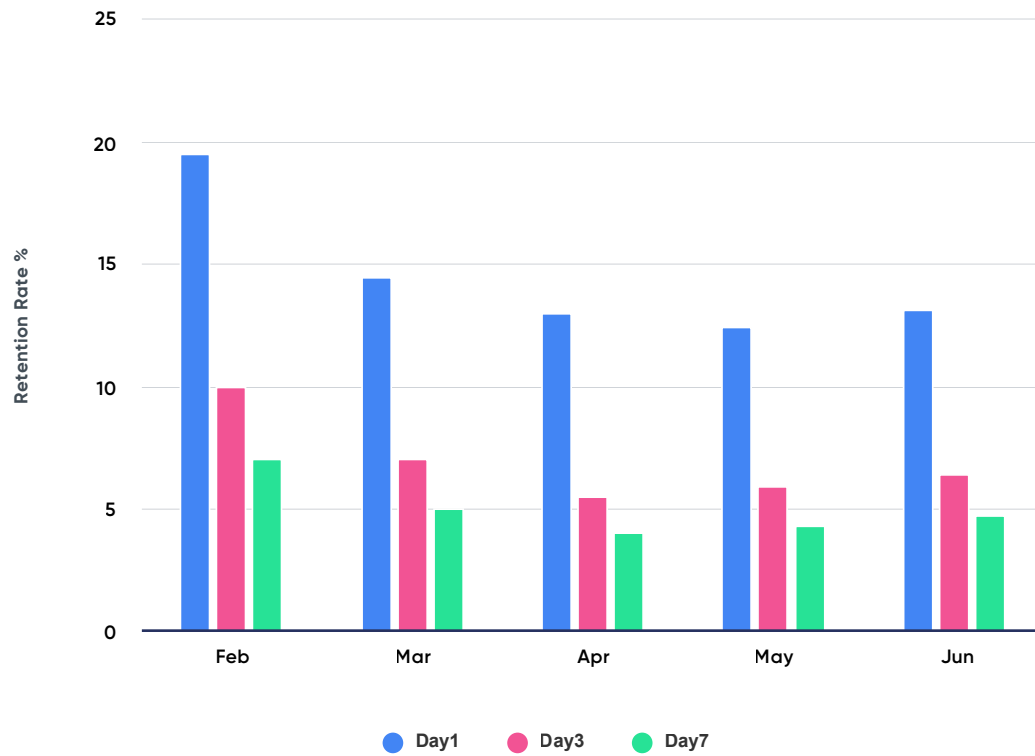
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (LIFESTYLE)

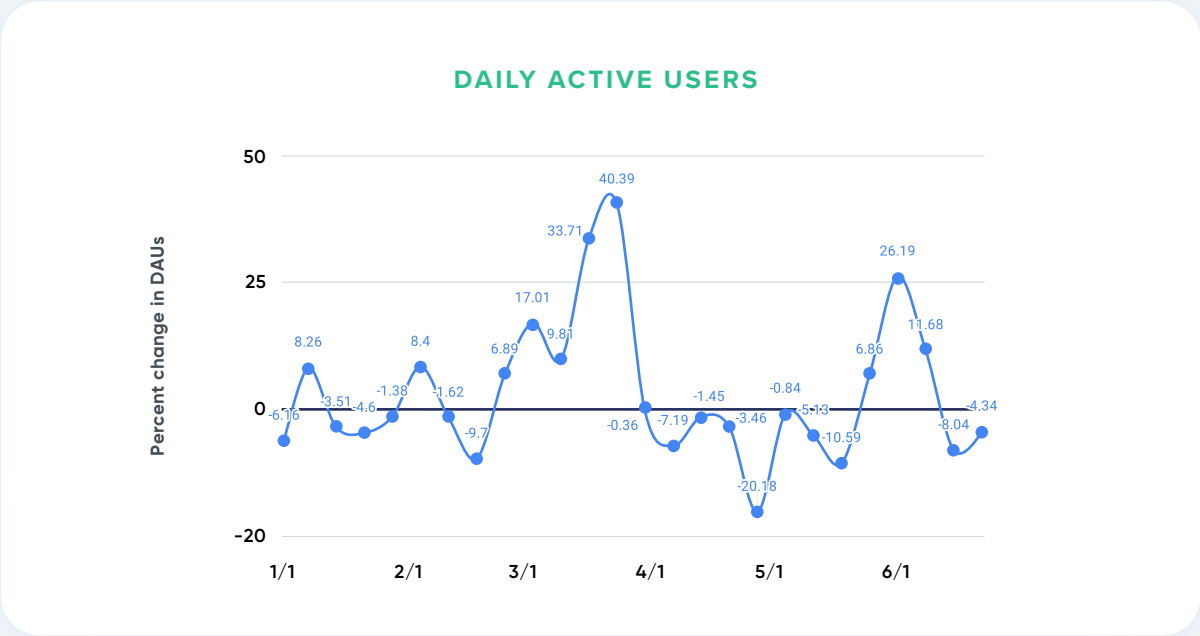


Medical & Medicine Delivery

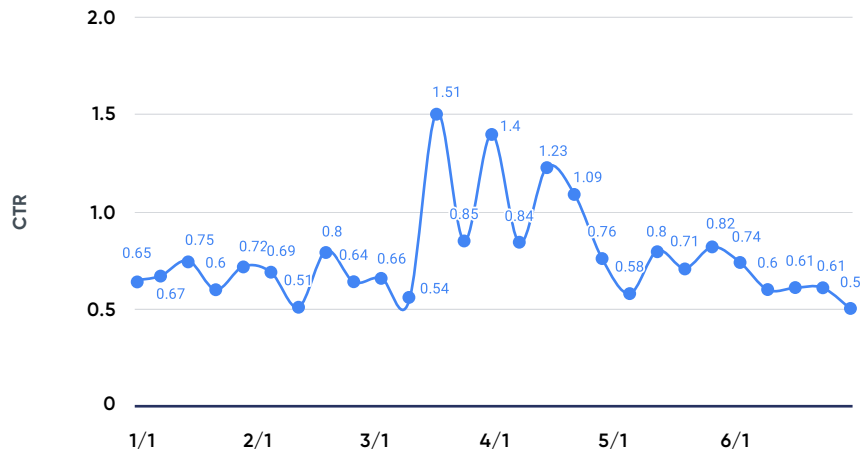
Throughout the course of this pandemic, essential services like access to healthcare and pharmacies have been in high demand. People are both more interested in their overall health and are turning to video visits and emails rather than going to hospitals for non-urgent care. Medical & Medicine Delivery apps have seen spikes in DAUs as high as 40% before appearing to normalize as the month of March came to a close.

In response to a jump in user engagement throughout the pandemic, Medical & Medicine Delivery apps sent more campaigns than average during most of the month of March and almost 20% more than normal on March 17 as lockdown orders were initiated. Although the beginning of April saw a more than 65% drop in campaign activity, campaigns were back up 61% by the middle of the month.

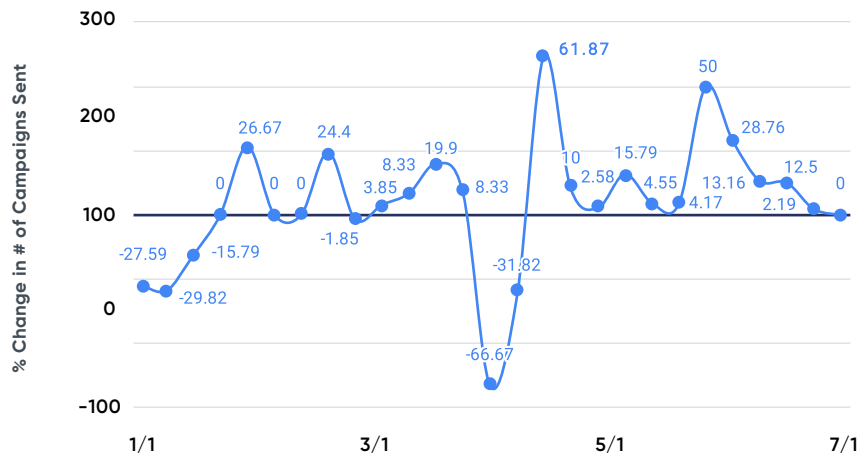
CTRs followed suit: both jumping 1.51% and falling 0.84% in response to campaign activity. Retention rates similarly rose slightly in March, only to fall back to near-normal levels in April.



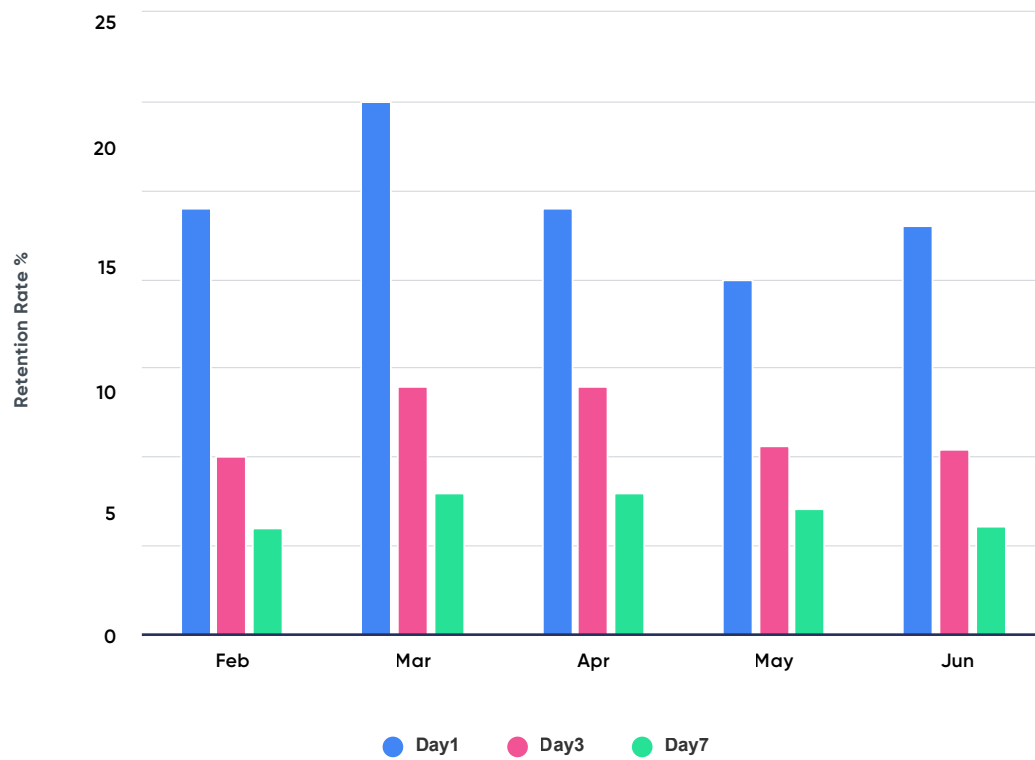
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



RETENTION RATE (MEDICAL)



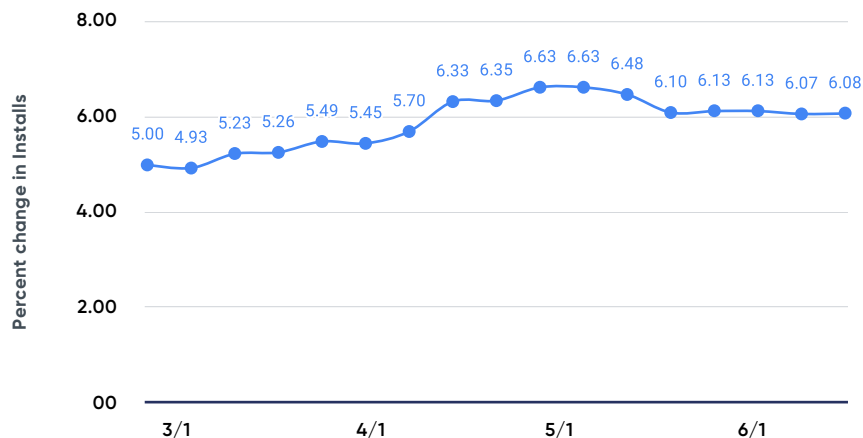
Retail & Wholesale

With such a high degree of economic uncertainty, consumers are curtailing discretionary spending and instead focusing on essentials. [Fashion and luxury sales have fallen off a cliff - down a stunning 40%](#). Major brands like Apple and Nike closed their brick-and-mortar stores in an effort to curtail the spread of the virus. Patagonia went even further and closed its online store for three weeks to ensure the health of their distribution center employees. Retail and Wholesale apps are some of the hardest hit by this pandemic, with app launches falling by at least 40%.

Retail apps sent more than 20% fewer campaigns in the months of March and April. CTRs have remained fairly steady, fluctuating only around 0.75%.

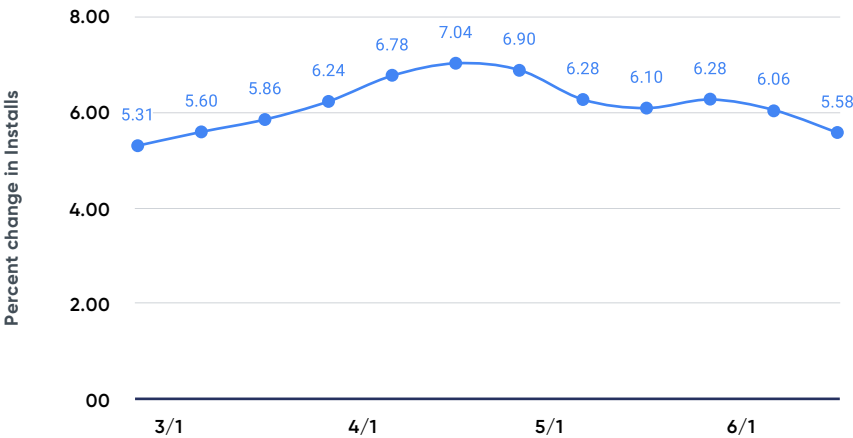
Day 1 retention rates for Wholesale apps fell by 12%, a -46% change, and Day 7 retention saw a -50% change. Retention rates for Retail apps have not seen a dramatic change: just a 1% decrease in Day 1 and Day 3 retention, and just a 2% drop in Day 7 retention.

ORGANIC INSTALLS (RETAIL)



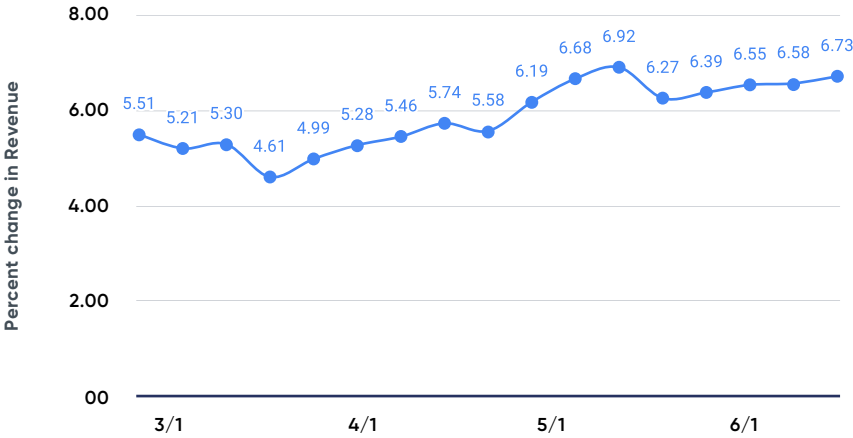
Source: AppsFlyer

NON-ORGANIC INSTALLS



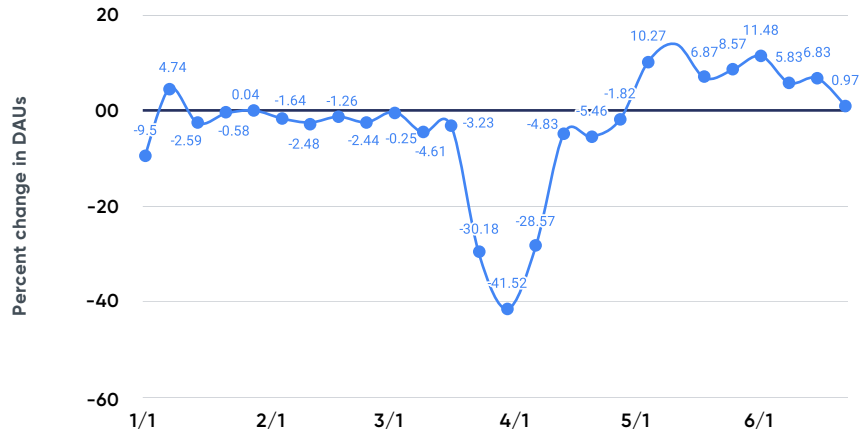
Source: AppsFlyer

MOBILE APP REVENUE

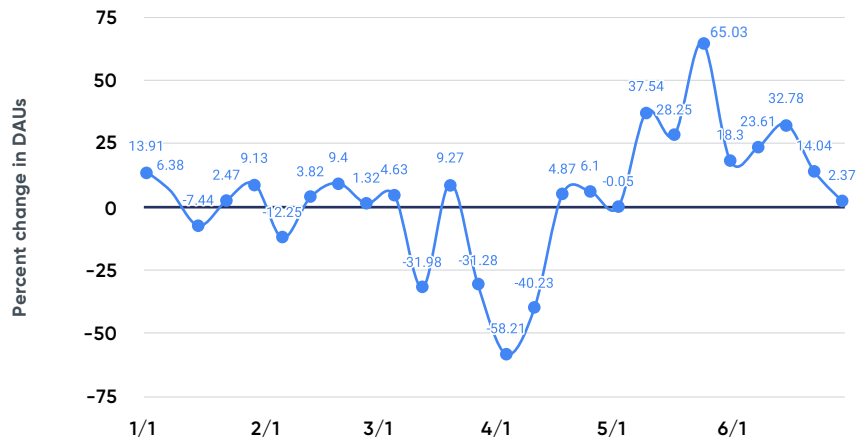


Source: AppsFlyer

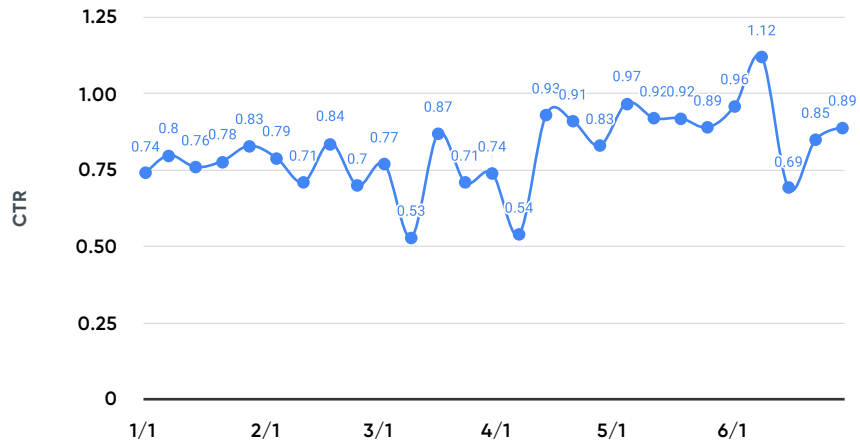
DAILY ACTIVE USERS (RETAIL)



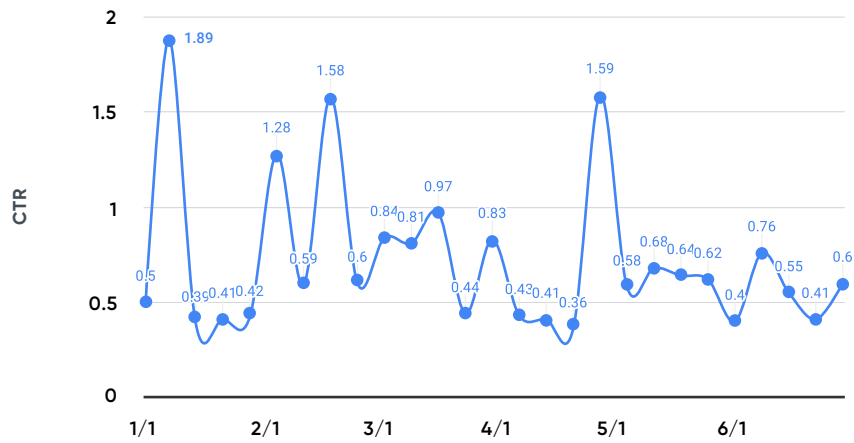
DAILY ACTIVE USERS (WHOLESALE)



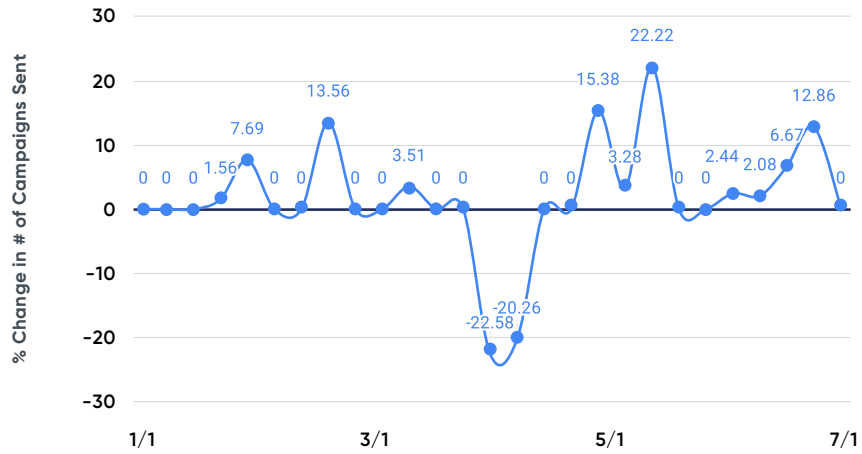
PUSH NOTIFICATION CTRS (RETAIL)



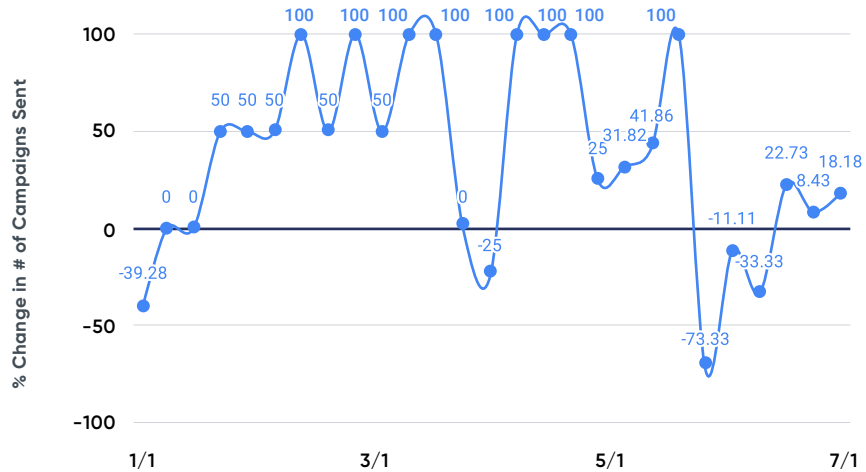
PUSH NOTIFICATION CTRS (WHOLESALE)



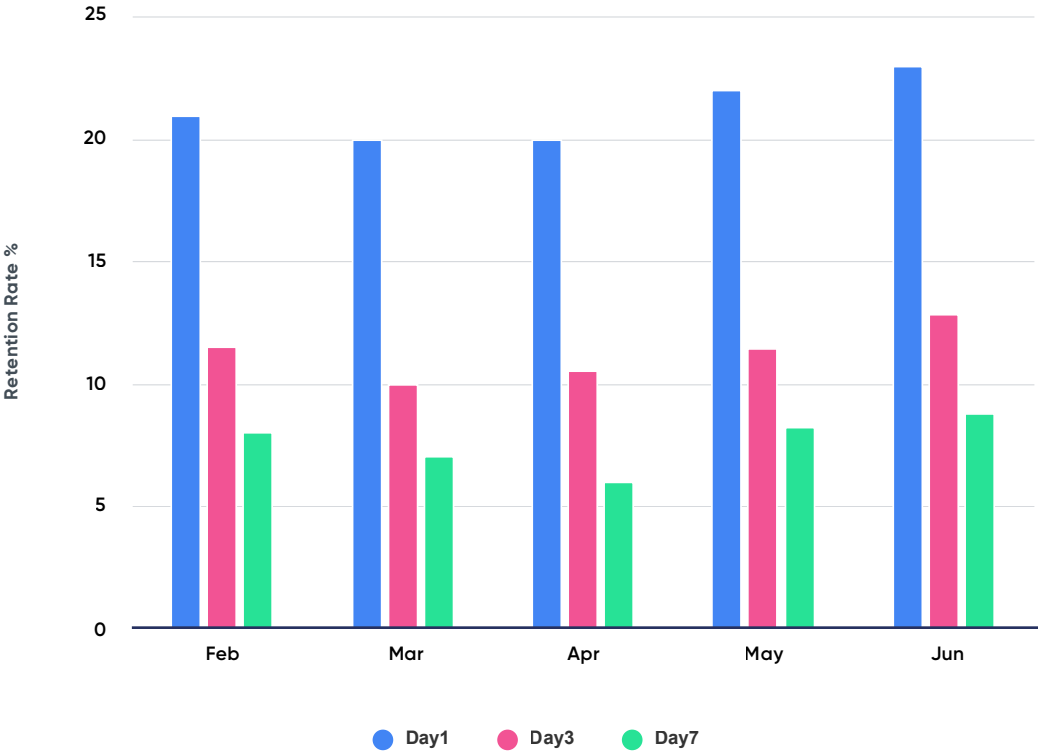
VOLUME OF CAMPAIGNS SENT (RETAIL)



VOLUME OF CAMPAIGNS SENT (WHOLESALE)



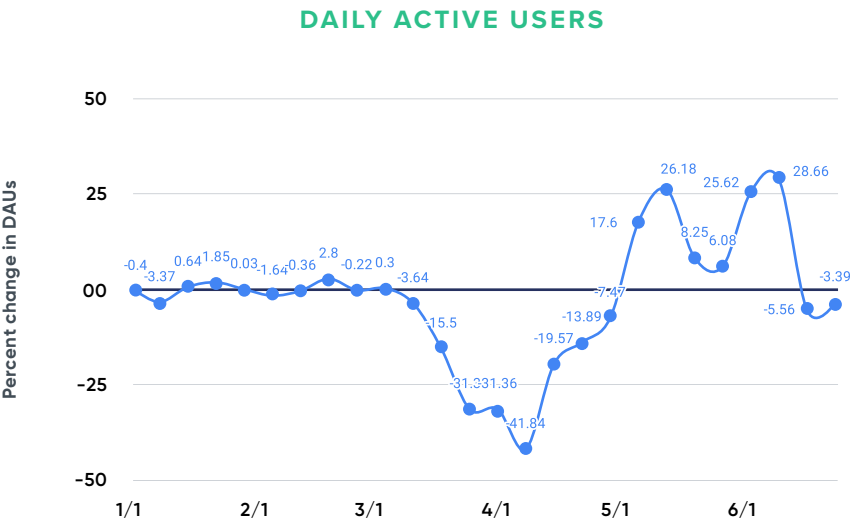
RETENTION RATE (RETAIL)



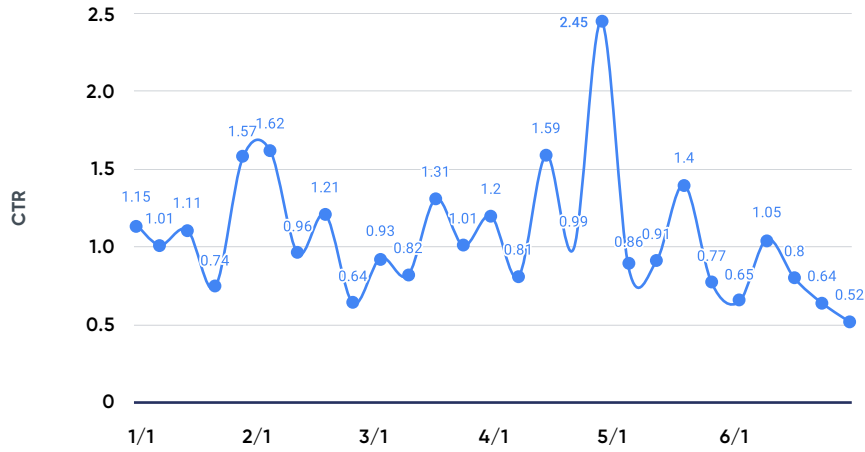
Ride Hailing

Between strict travel restrictions and widespread work-from-home orders, ride hailing apps have been hard hit, with a nearly 60% decrease in app launches by the end of March. These apps, stunted by potential customers being forced to stay home, have also seen a significant drop (nearly 35%) in the number of campaigns sent from mid-March to mid-April.

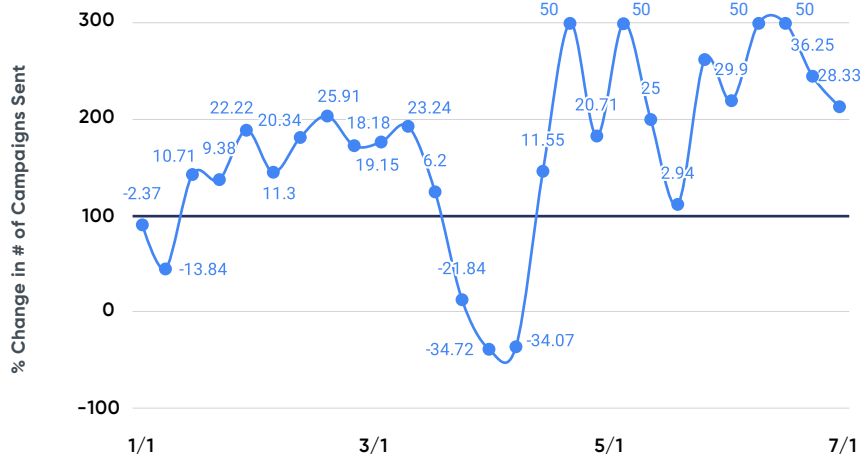
By the end of April, however, marketing activity shot up to a 50% increase. CTRs followed suit: up 1.59% from being down 0.81% in early April. Retention rates didn't recover as quickly: Day 1, Day 3, and Day 7 retention were all down by approximately 50% at the end of April.



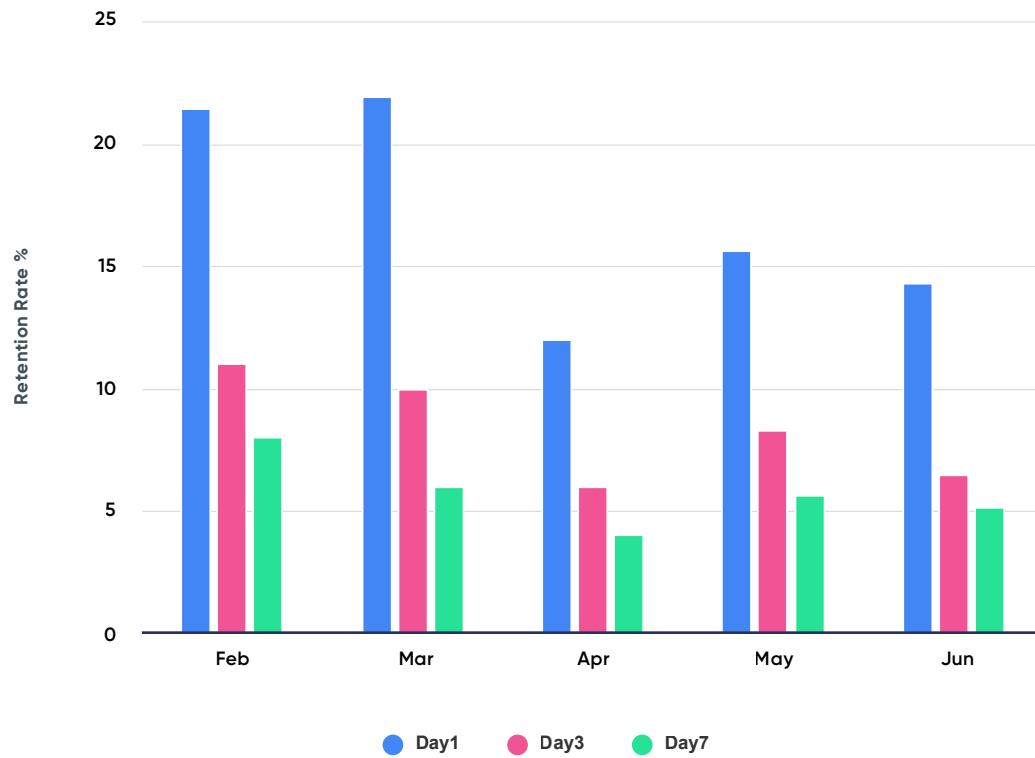
PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



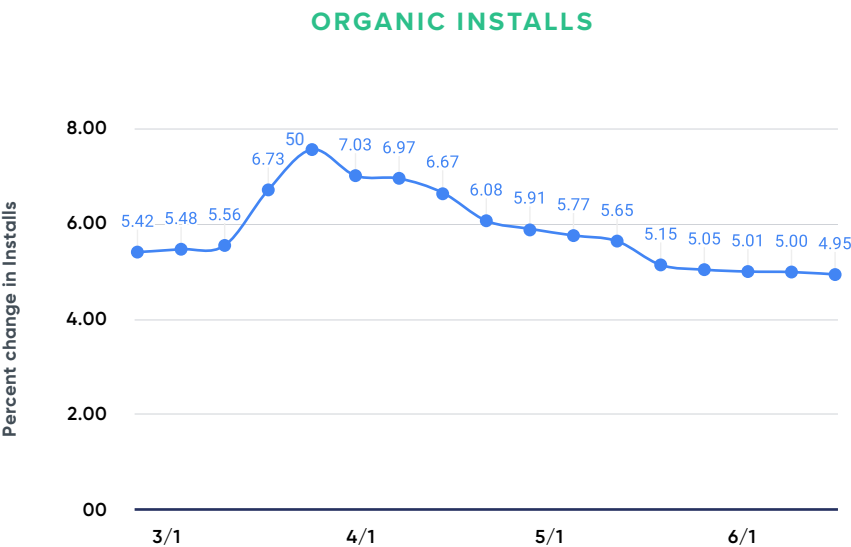
RETENTION RATE (RIDE HAILING)



Social Networking

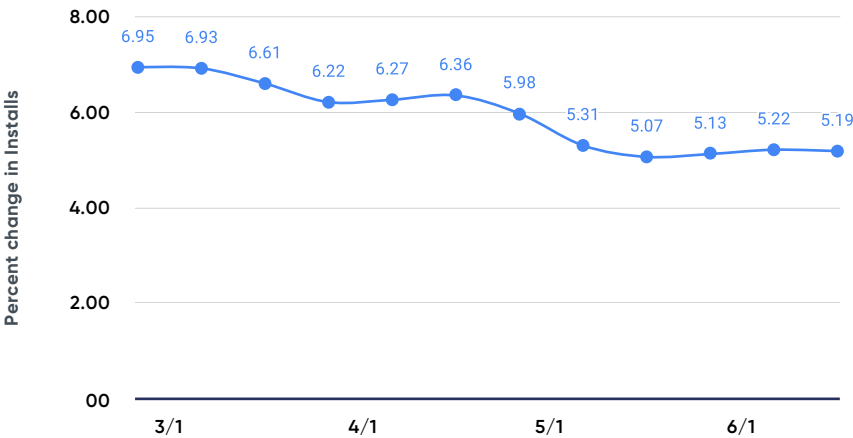
As app users are forced into isolation, the easy assumption would be they would increasingly turn to social media to connect with others. Surprisingly, our data suggests the opposite. Beginning in early March, DAUs were down 6%, and by the end of the month had dropped by 11.29%.

Social networking apps are also sending slightly fewer campaigns than usual down between 4-6% from mid-March through the month of April. In spite of a brief spike in late March, CTRs have also followed a slightly downward trend.



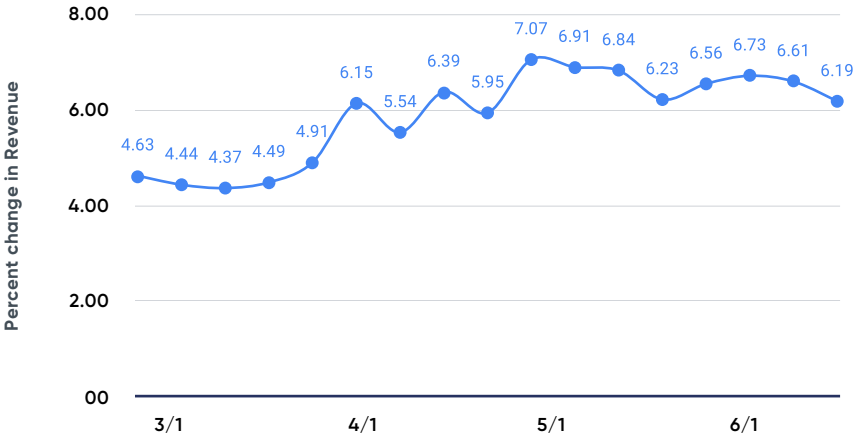
Source: AppsFlyer

NON-ORGANIC INSTALLS



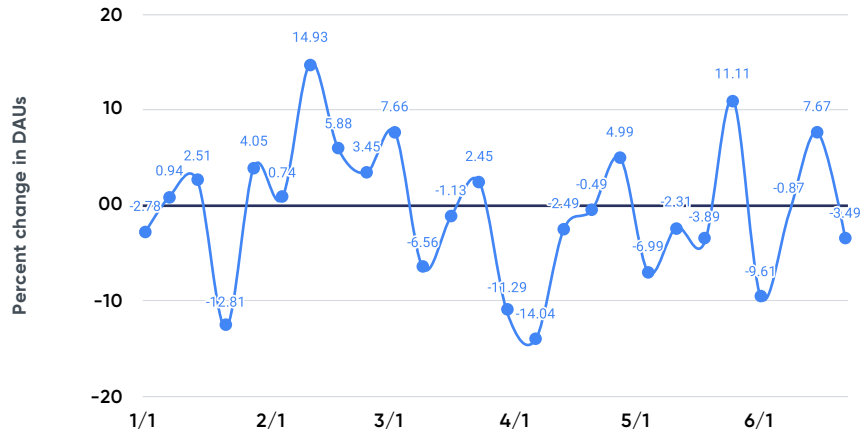
Source: AppsFlyer

MOBILE APP REVENUE

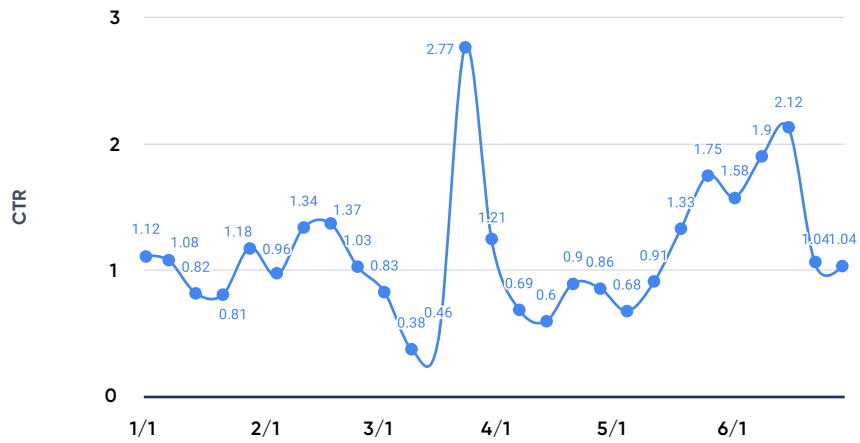


Source: AppsFlyer

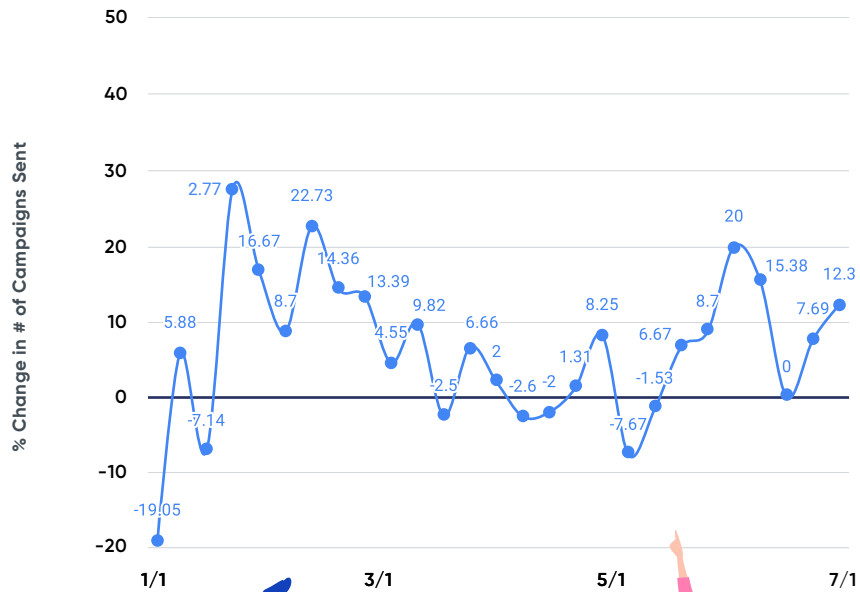
DAILY ACTIVE USERS



PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT

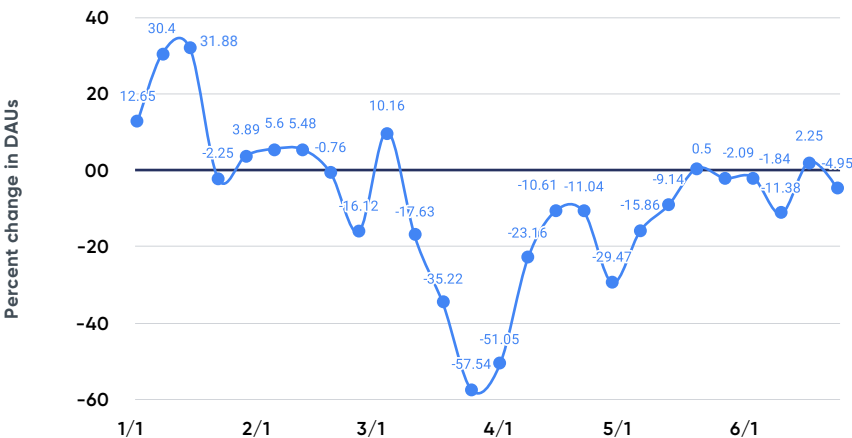


Sports Content & Sports Games

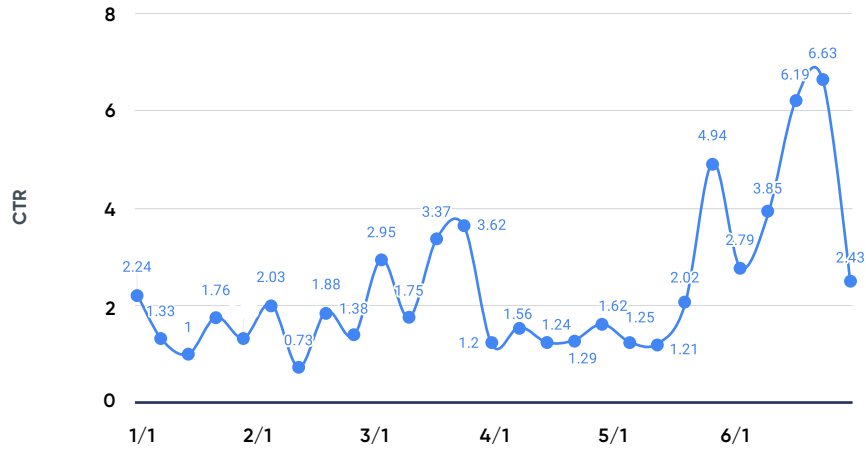
Bans on public gatherings have forced most leagues to either indefinitely postpone or outright cancel their seasons. As a result, Sports Content and Sports Games (Fantasy) apps are facing an extended off-season with little content to lure users and keep them engaged. App launches are down over 50% for both categories.

Sports Content & Sports Games apps have seen varied campaign activity, sometimes down over 45%, sometimes up 15%. Both verticals generally saw a drop in campaign volume in early March, which then rose throughout the month and into April. CTRs, on the other hand, have been wildly different: Sports Content apps saw a rise in CTRs throughout March, ending the month up 3.62%, while Sports Games apps experienced a sharp decline starting mid-February.

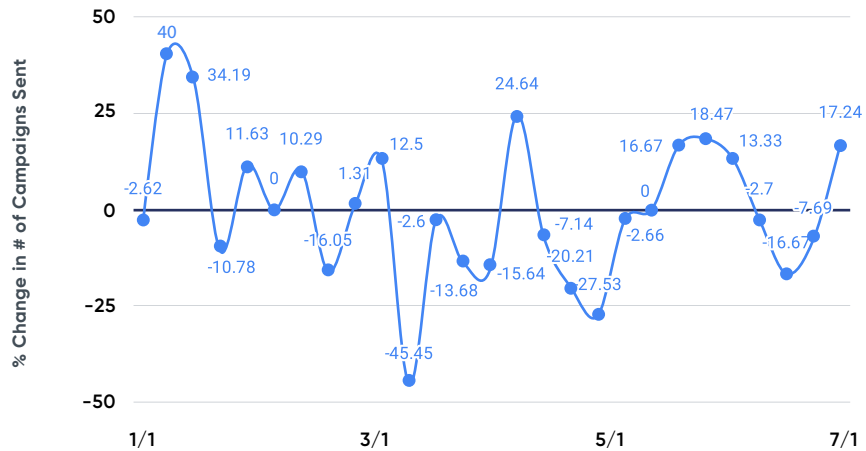
DAILY ACTIVE USERS (SPORTS CONTENT)



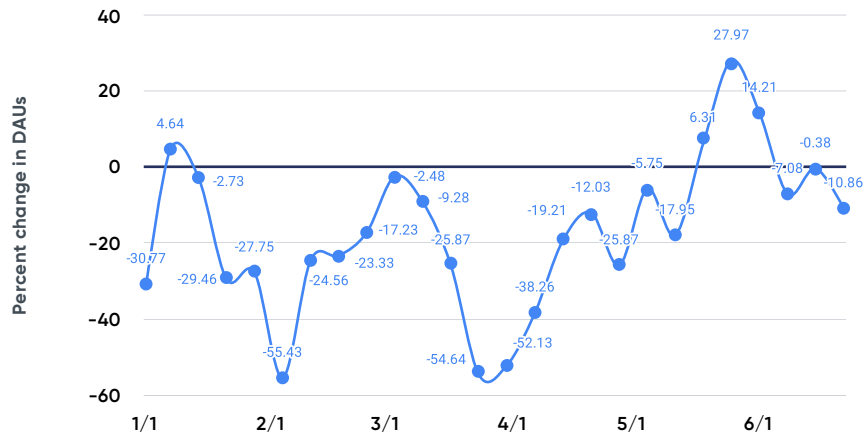
PUSH NOTIFICATION CTRS (SPORTS CONTENT)



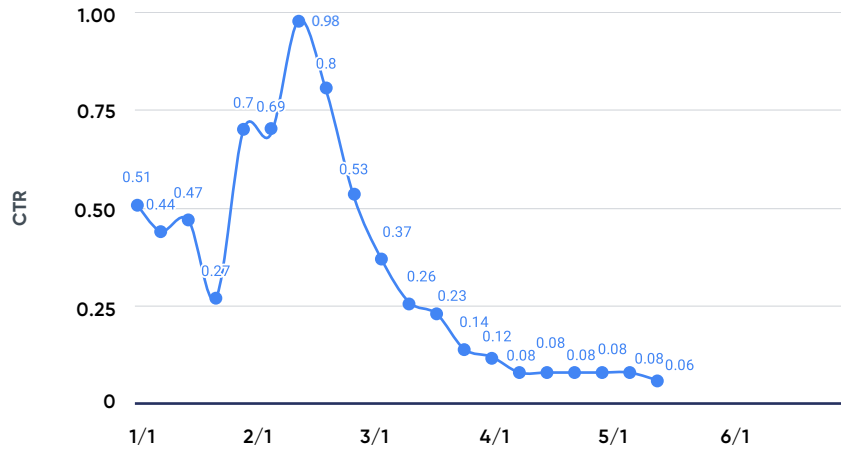
VOLUME OF CAMPAIGNS SENT (SPORTS CONTENT)



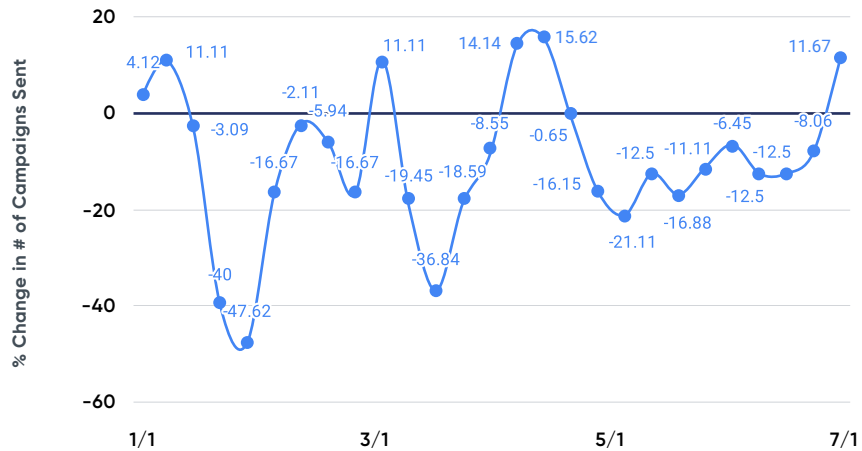
DAILY ACTIVE USERS (SPORTS GAMES)



PUSH NOTIFICATION CTRS (SPORTS GAMES)



VOLUME OF CAMPAIGNS SENT (SPORTS GAMES)

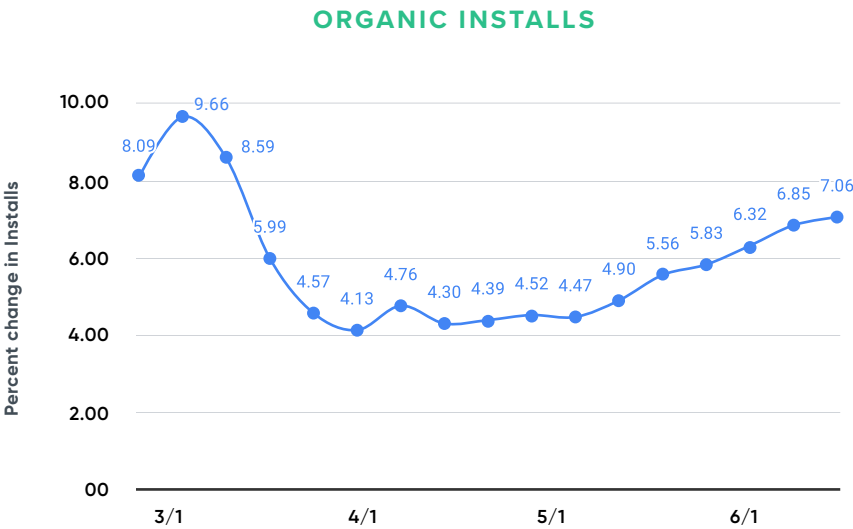


Travel & Hospitality

Given widespread bans on public gatherings and severe restrictions that have brought nearly all travel to a standstill, it's no surprise that Travel & Hospitality apps are especially hard hit as this pandemic stretches on. [The World Travel and Tourism Council projects a global loss of \\$2.1 trillion in revenue.](#)

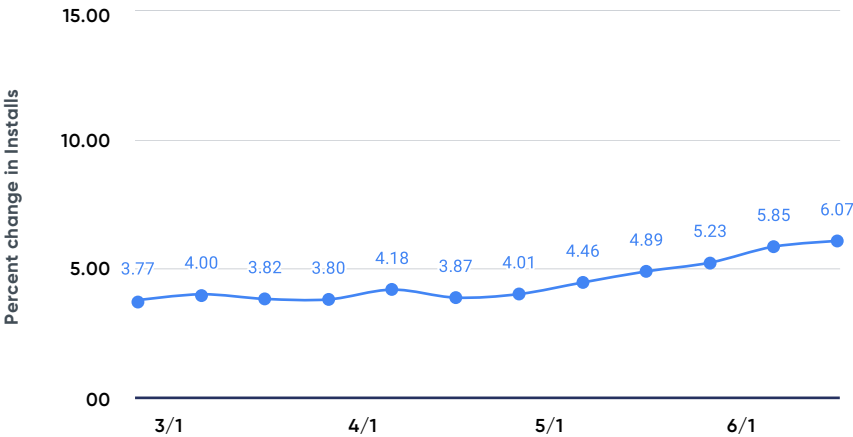
[While things may seem dire, there are initial signs of recovery in China. As restrictions are being lifted, hotel bookings increased by 40%, flights rose 230%, and the Chinese domestic tourism market says it is preparing to recover 70% of losses over the next six months. Nothing sparks wanderlust like cabin fever!](#)

Marketers for travel and hospitality apps have hit pause on campaigns as they regroup and formulate new strategies to engage users who are prohibited from traveling or need to cancel bookings. From a peak in early March, campaign volume for Hospitality apps was down between 50-55% by mid-April. Travel apps sent nearly 20% fewer campaigns over the same time period. CTRs for both industries also saw slight declines.



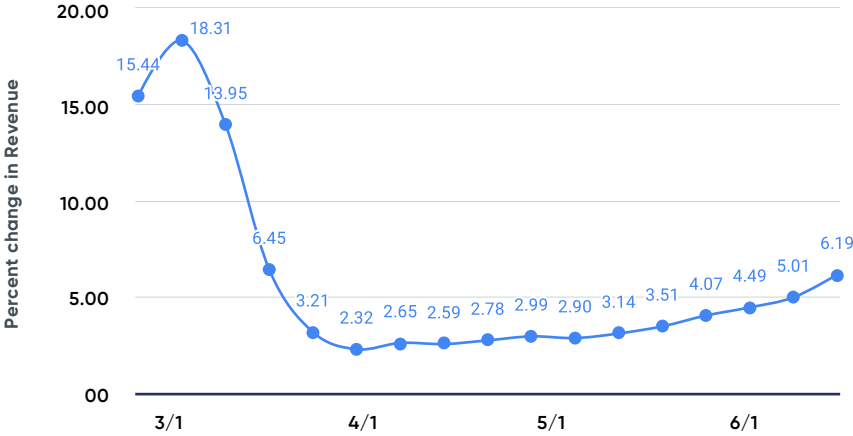
Source: AppsFlyer

NON-ORGANIC INSTALLS



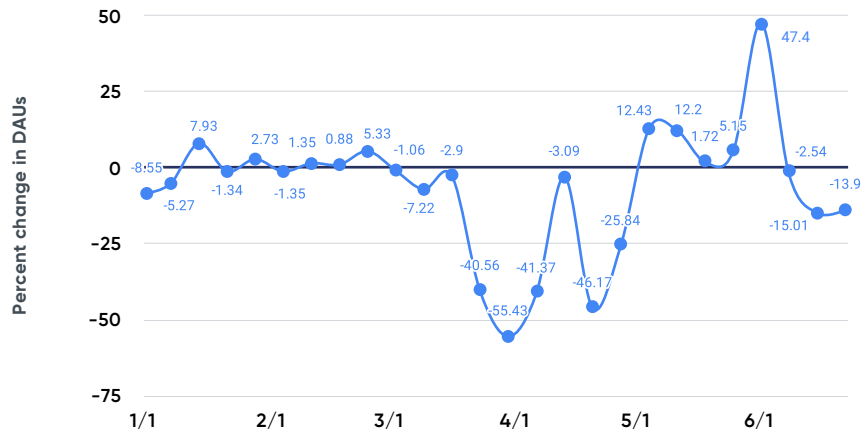
Source: AppsFlyer

MOBILE APP REVENUE

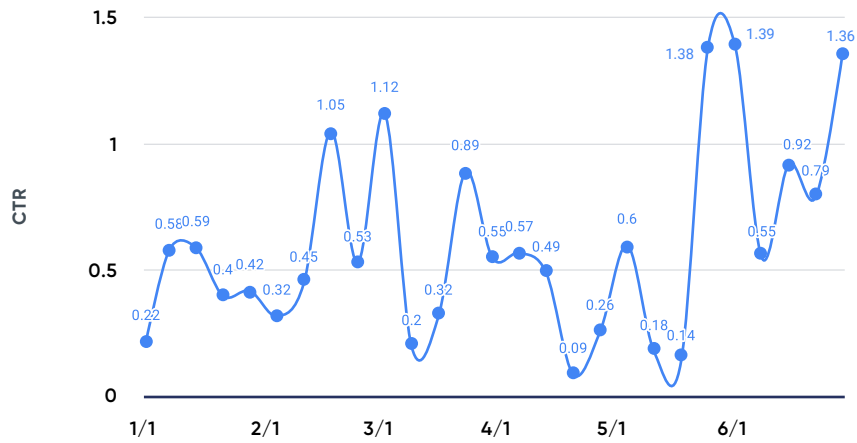


Source: AppsFlyer

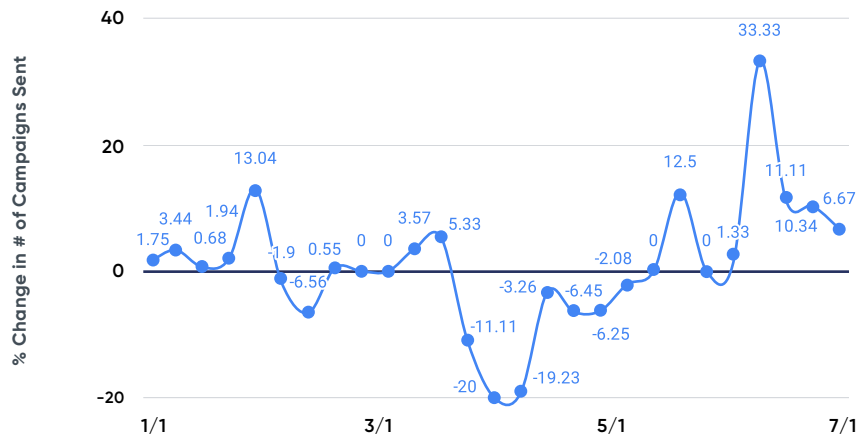
DAILY ACTIVE USERS



PUSH NOTIFICATION CTRs



VOLUME OF CAMPAIGNS SENT



Additional Resources

[Mobile Data Trends Dashboard](#)

This real-time dashboard shows the current trends of daily active users (DAUs), campaign volume, push notification CTRs, and retention rates to provide marketers up-to-date performance benchmarks across 20 industries.

[Panel Q&A: How Expert Marketers Are Adapting to an Evolving Normal](#)

We asked top mobile marketers about the impact that the coronavirus has had on their industries and how their brands are responding.

[On-Demand Video Series: New Rules of Marketing Engagement](#)

Business and marketing leaders candidly discuss how they're adjusting their plans and approaches in real-time to reach, engage, convert, and retain their users amidst unprecedented uncertainty.

[Whitepaper: Giving Your Mobile App Business Resilience](#)

CleverTap

CleverTap is the leading customer engagement and retention platform that helps brands maximize user lifetime value. CleverTap moves beyond outdated marketing automation tools to provide organizations of all sizes with deep insights into user behavior and usage trends across web and mobile. The result is a custom user experience based on real-time product and app usage-not a static user profile-that dramatically increases engagement and conversions while reducing customer churn. Over 8,000 consumer brands around the world, including Vodafone, Disney+ Hotstar, Sony, Discovery, Fandango LATAM, Carousell, and Gojek trust CleverTap to help them improve user engagement and retention thereby growing long term revenue. CleverTap is backed by leading venture capital firms including Sequoia India, Tiger Global Management, Accel, and Recruit Holdings, and operates globally with regional offices around the world.

Transform Your Customer Engagement With CleverTap

1 Billion

Devices Reached

\$2 Billion

Incremental Revenue Delivered

20 Million

Campaigns Sent

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