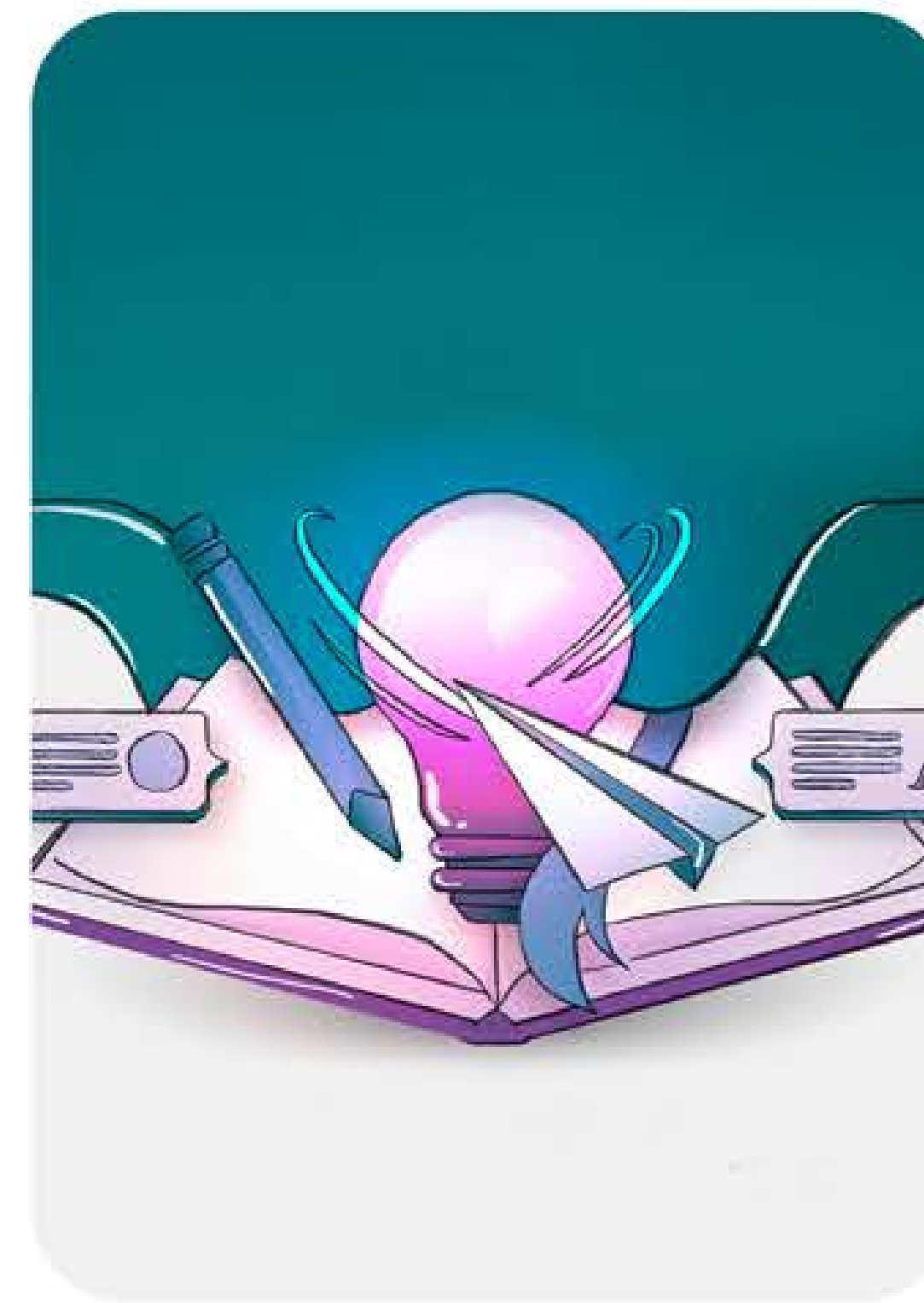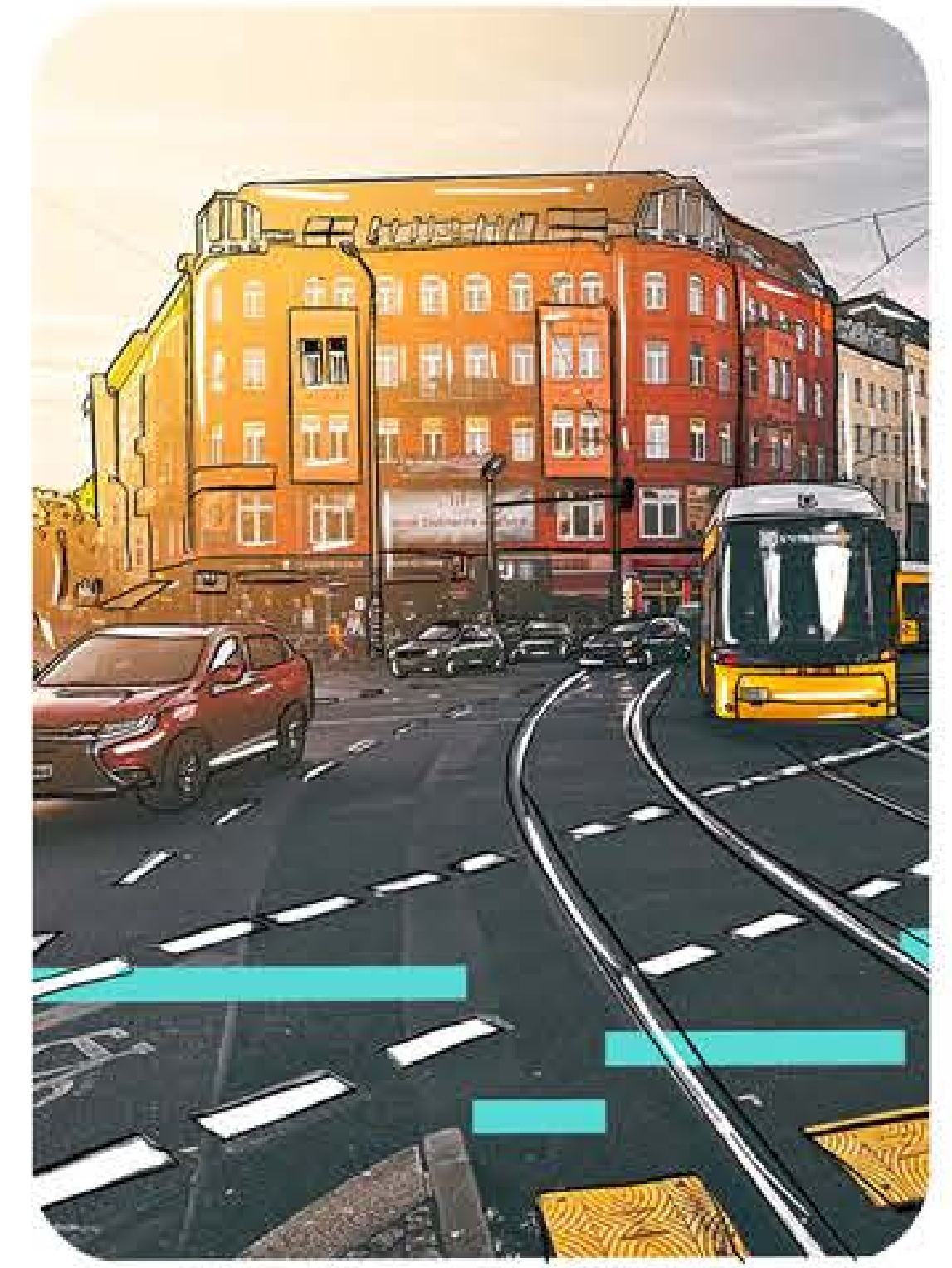# CORONAVIRUS BUSINESS IMPACT

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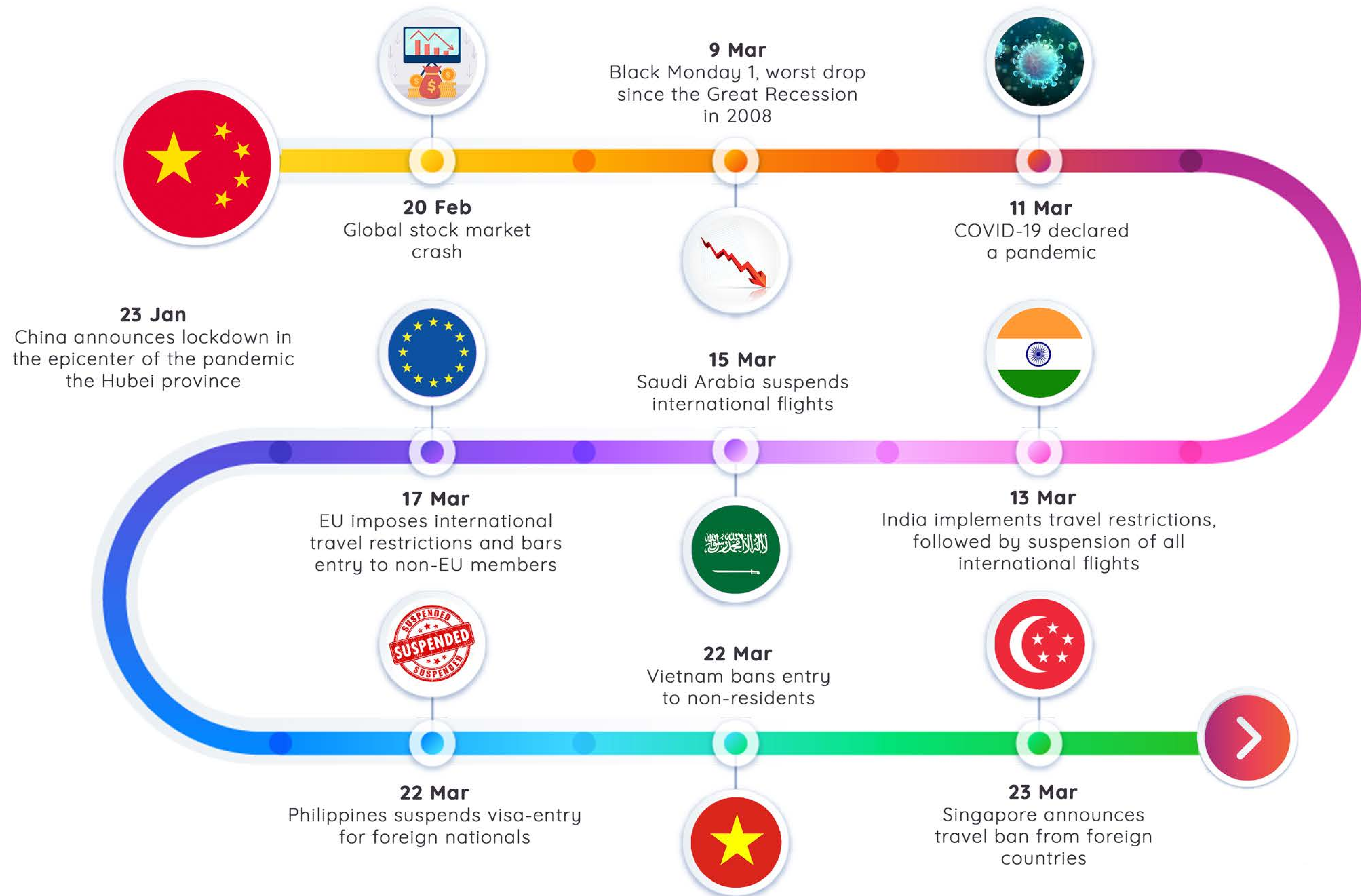
The one thing that comes to the aid of businesses and governments alike is hard-hitting, in-depth data. Data that uncovers facts, blows the dust off our intuitions and distinguishes the impactful from the noise.

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.

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HISTORY OF COVID-19

23 Jan
China announces lockdown in the epicenter of the pandemic the Hubei province

20 Feb
Global stock market crash

9 Mar
Black Monday 1, worst drop since the Great Recession in 2008

11 Mar
COVID-19 declared a pandemic

15 Mar
Saudi Arabia suspends international flights

13 Mar
India implements travel restrictions, followed by suspension of all international flights

17 Mar
EU imposes international travel restrictions and bars entry to non-EU members

22 Mar
Vietnam bans entry to non-residents

22 Mar
Philippines suspends visa-entry for foreign nationals

23 Mar
Singapore announces travel ban from foreign countries

NORTH AMERICA

Downloads	0.00%
DAU	-0.10%

MIDDLE EAST

Downloads	37.00%
DAU	5.95%

INDIA

Downloads	55.50%
DAU	6.00%

EUROPE

Downloads	5.30%
DAU	3.20%

SOUTH EAST ASIA

Downloads	21.50%
DAU	2.30%

Data Source Apptopia

Data collected for March 2020

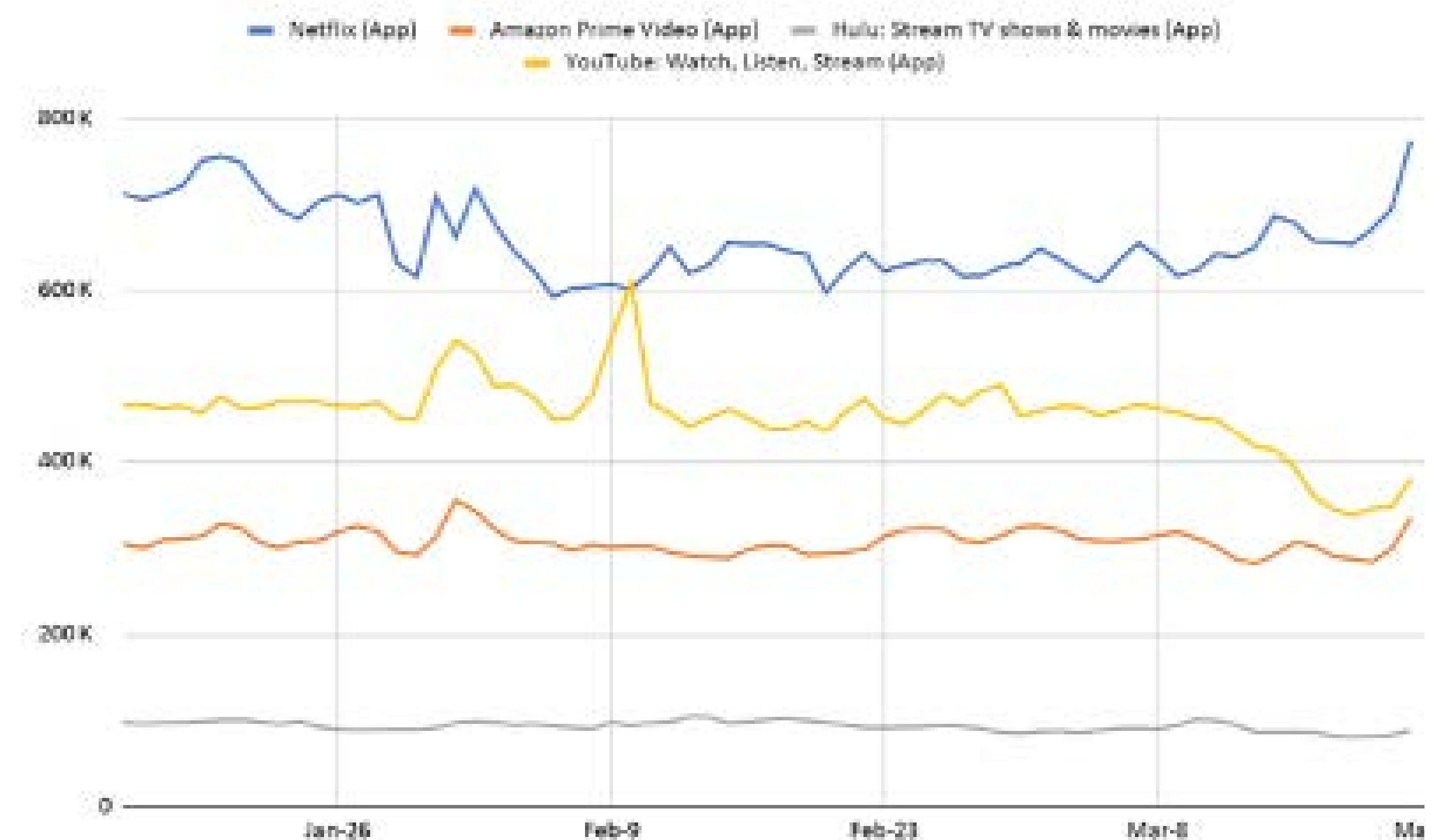# WORLDWIDE TRENDS IN ON-DEMAND ENTERTAINMENT APPS

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

- **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.

WORLDWIDE TRENDS IN NEWS MEDIA

Download trends for top 13 video conferencing apps, worldwide
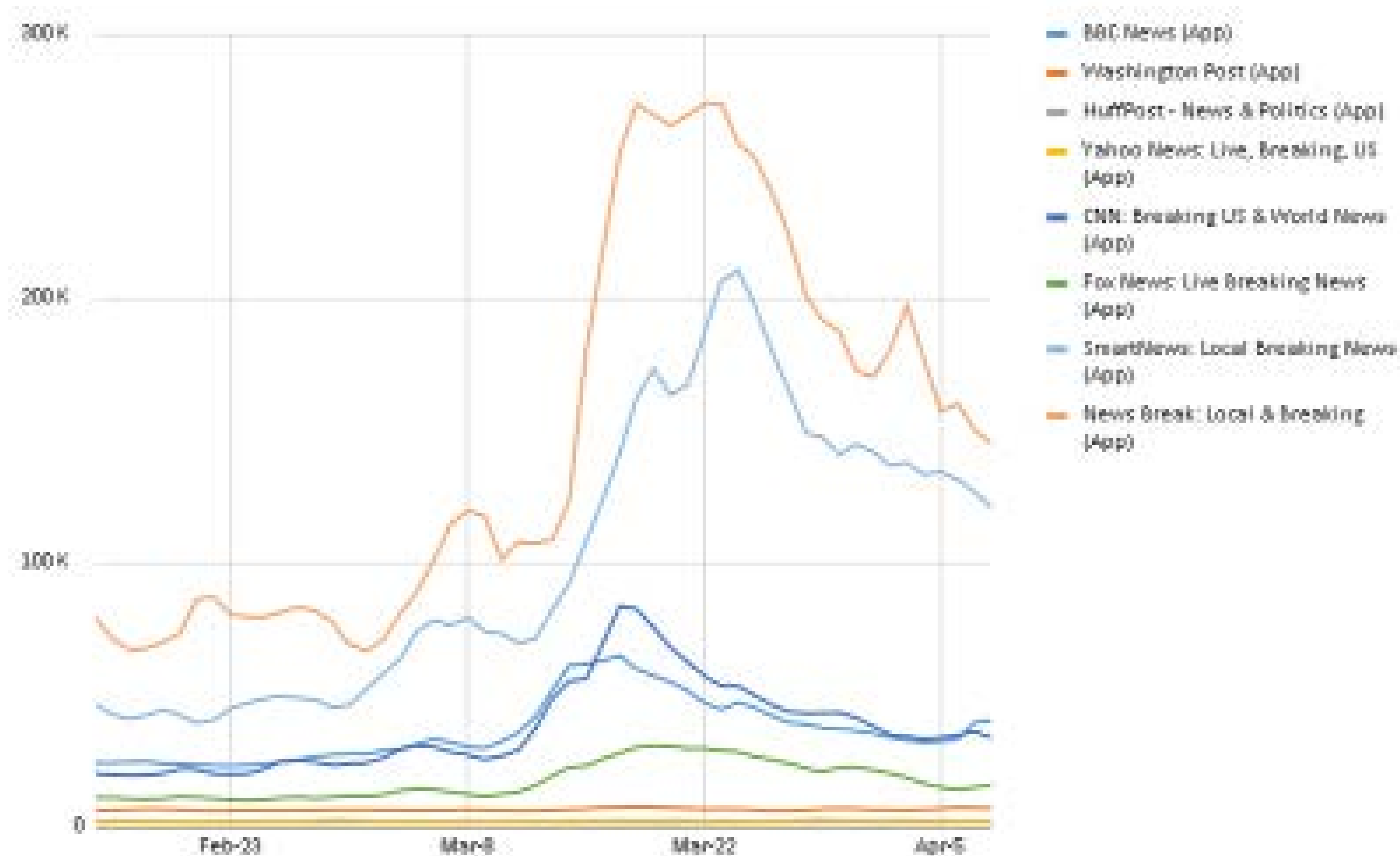
- Exponential upward trends in late February and early March - this coincides with the total increase in the number of COVID-19 cases worldwide.

- **200% rise in total downloads and viewership in the first two weeks of March.**

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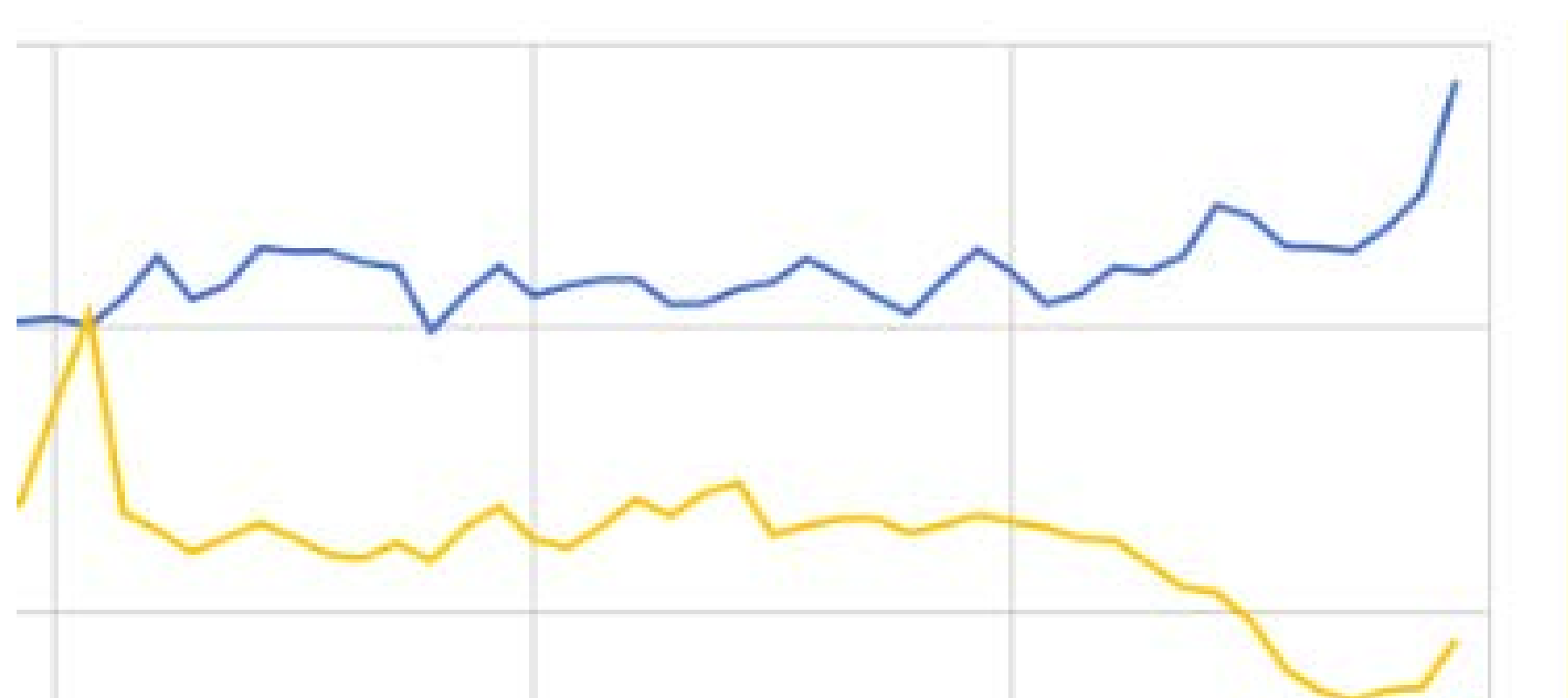
No, we're not kidding. There is no imaginary mirror between the two lines on the graph. The blue line on top is the 30 day trend for Netflix and the orange one below is the trend for YouTube for the same period. If one sees the DAU for the last 90 days instead, the drop in sessions and downloads for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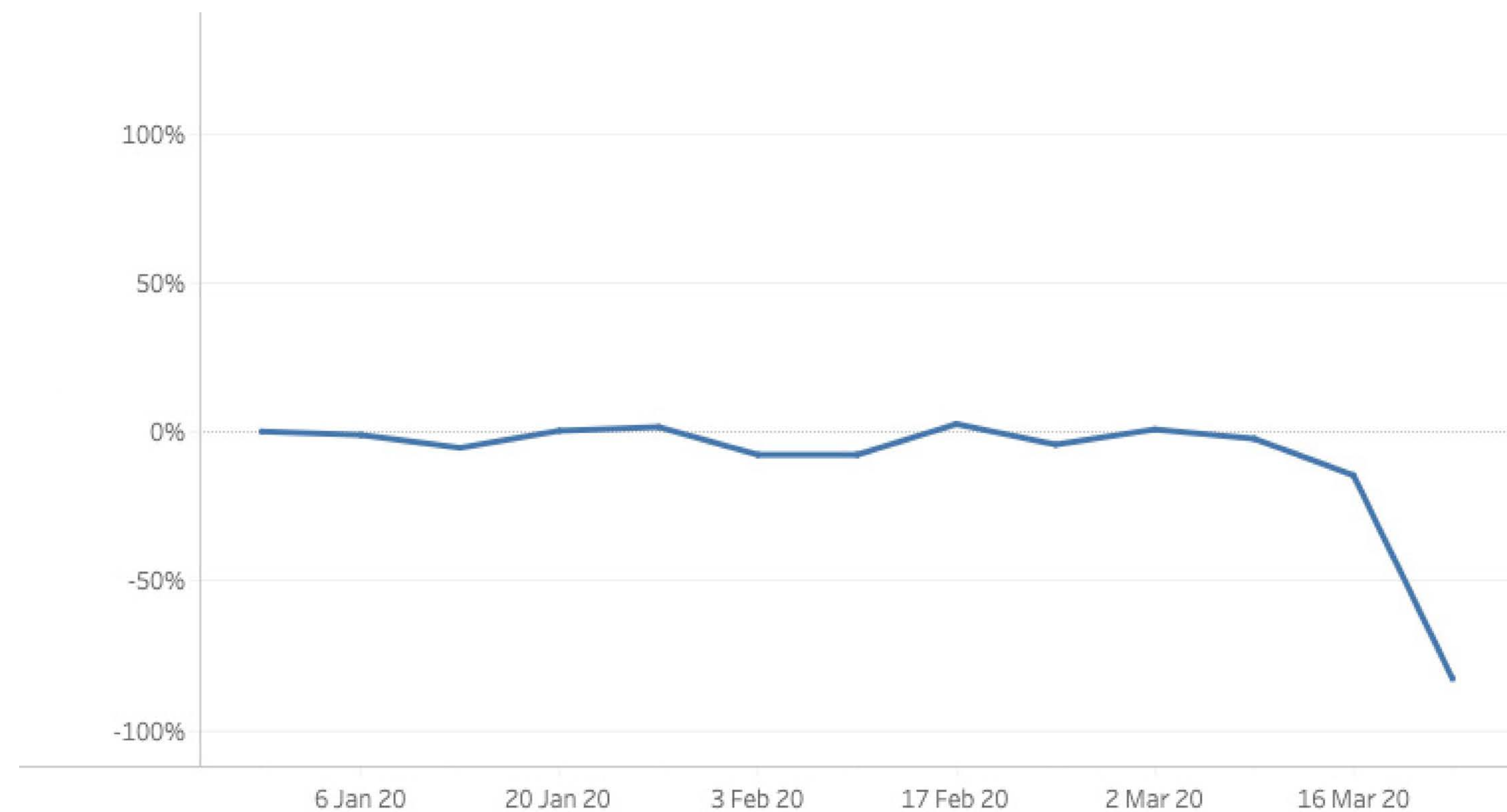
INDIA

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.
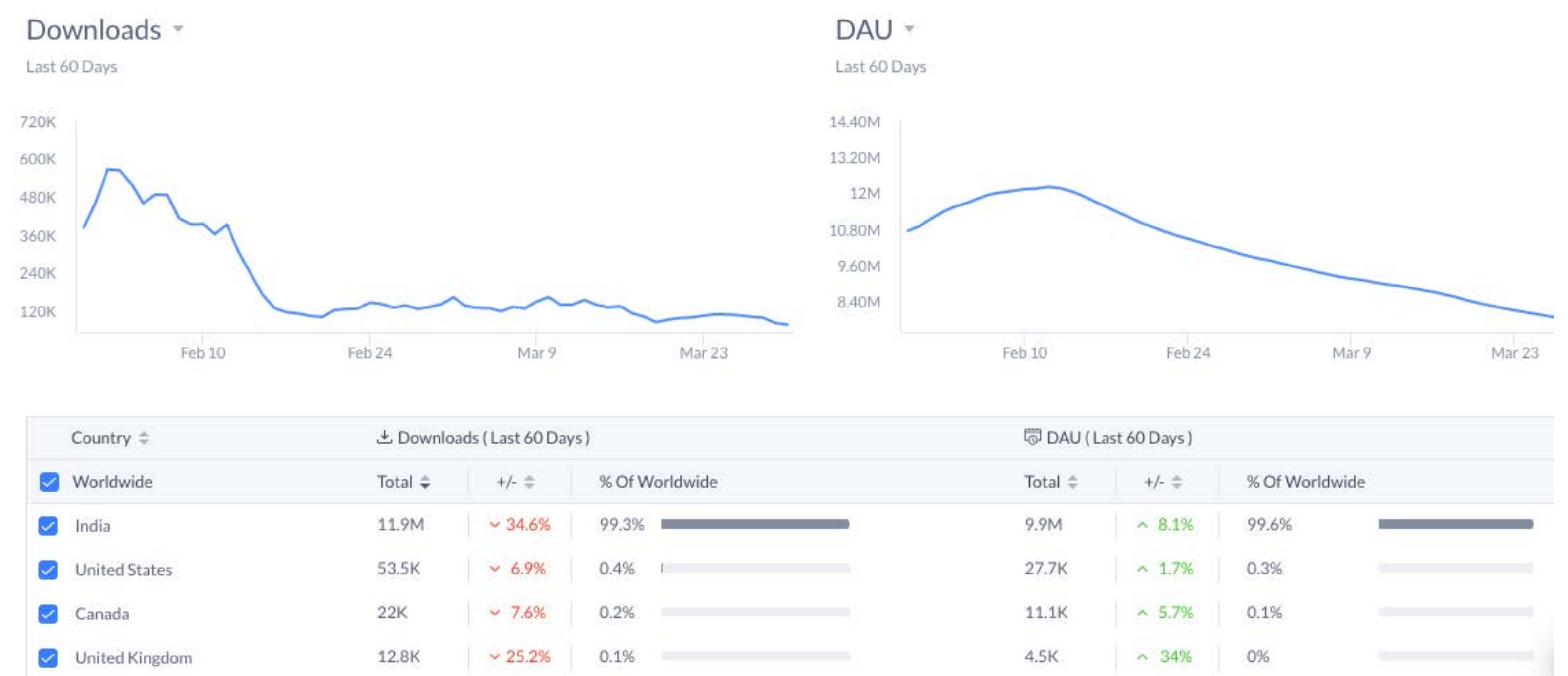
NETFLIX INDIA LEADS FROM THE FRONT

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%

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%

SOUTHEAST ASIA

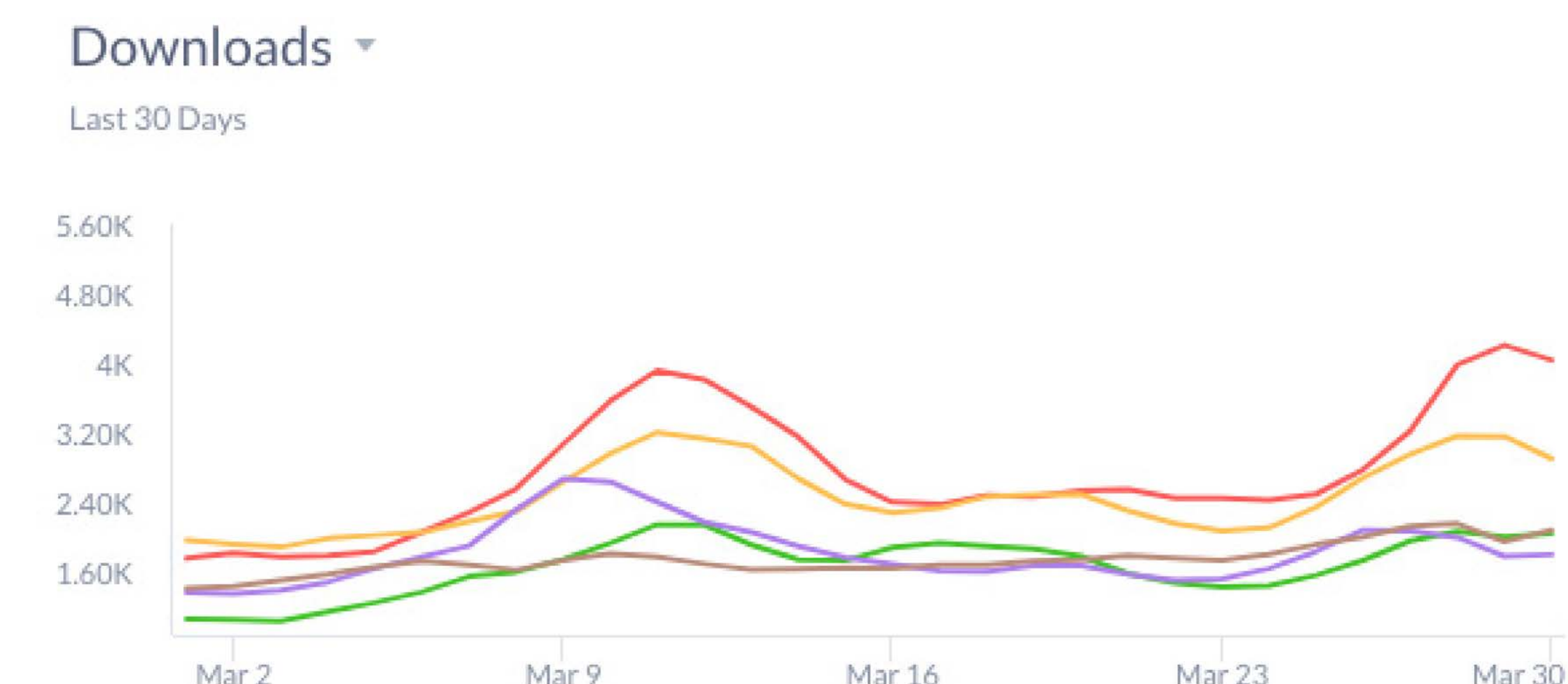**Battle of the Entertainment Apps: It's Netflix vs iQIYI vs V Live**
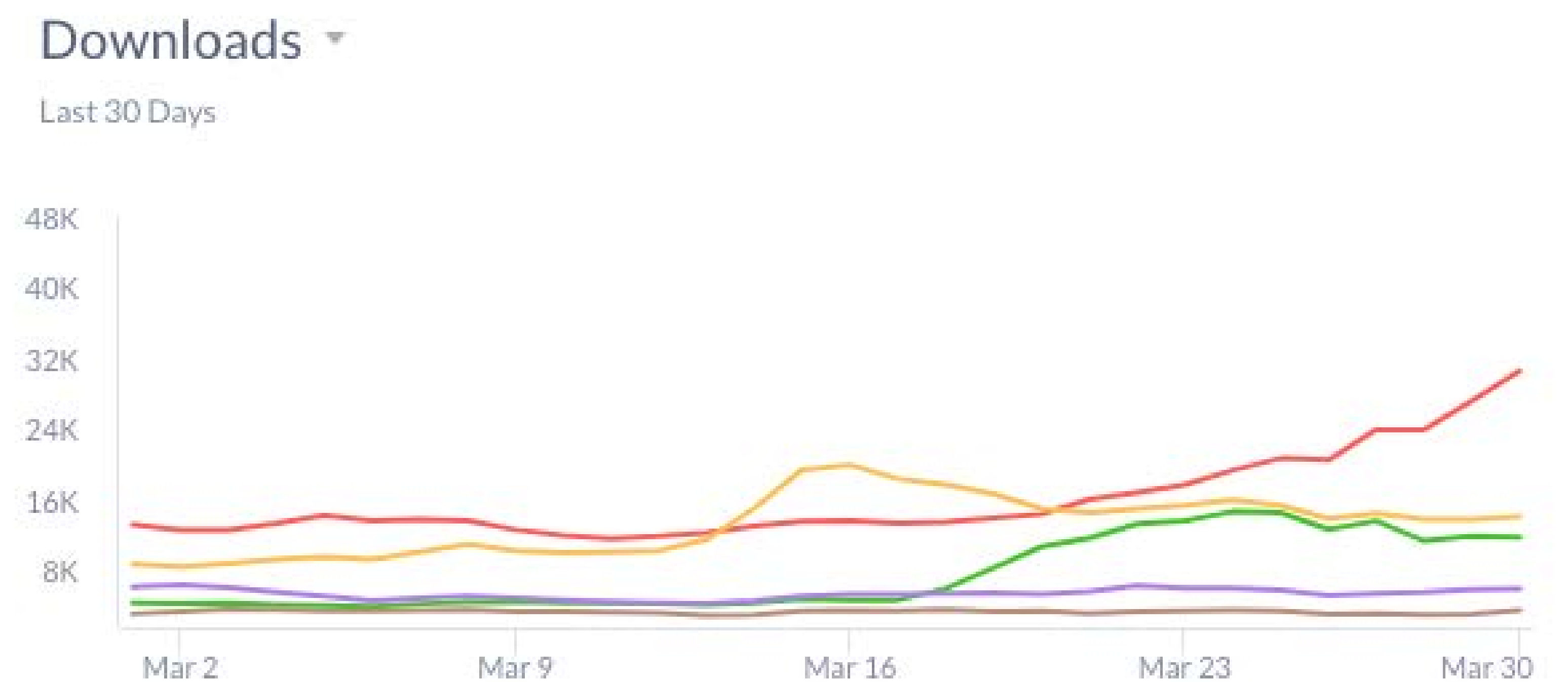
*Netflix's growth in Southeast Asia has seen an upward trend, with **Indonesia (+16%, last 30 days)** and **Malaysia (+35%, last 30 days)** being the key drivers.*

Downloads
Last 30 Days

DAU
Last 30 Days

Country	Downloads (Last 30 Days)			DAU (Last 30 Days)		
	Total	+/-	% Of Worldwide	Total	+/-	% Of Worldwide
Worldwide						
Thailand	460.4K	^ 455%	25.2%	154.1K	^ 178%	17.5%
Indonesia	419K	^ 17%	23%	307.2K	v 0.6%	34.8%
Vietnam	291.9K	^ 60%	16%	169.7K	^ 12%	19.2%
Philippines	285.6K	^ 717%	15.7%	78.6K	^ 233%	8.9%
Malaysia	125.7K	^ 37%	6.9%	78.6K	^ 10%	8.9%

*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 T**hailand (+455%), Indonesia (+17%) and Vietnam (+60%).***

Downloads
Last 30 Days

| Country	Downloads (Last 30 Days)		
	Total	+/-	% Of Worldwide
Worldwide			
Korea	144.4K	v 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.

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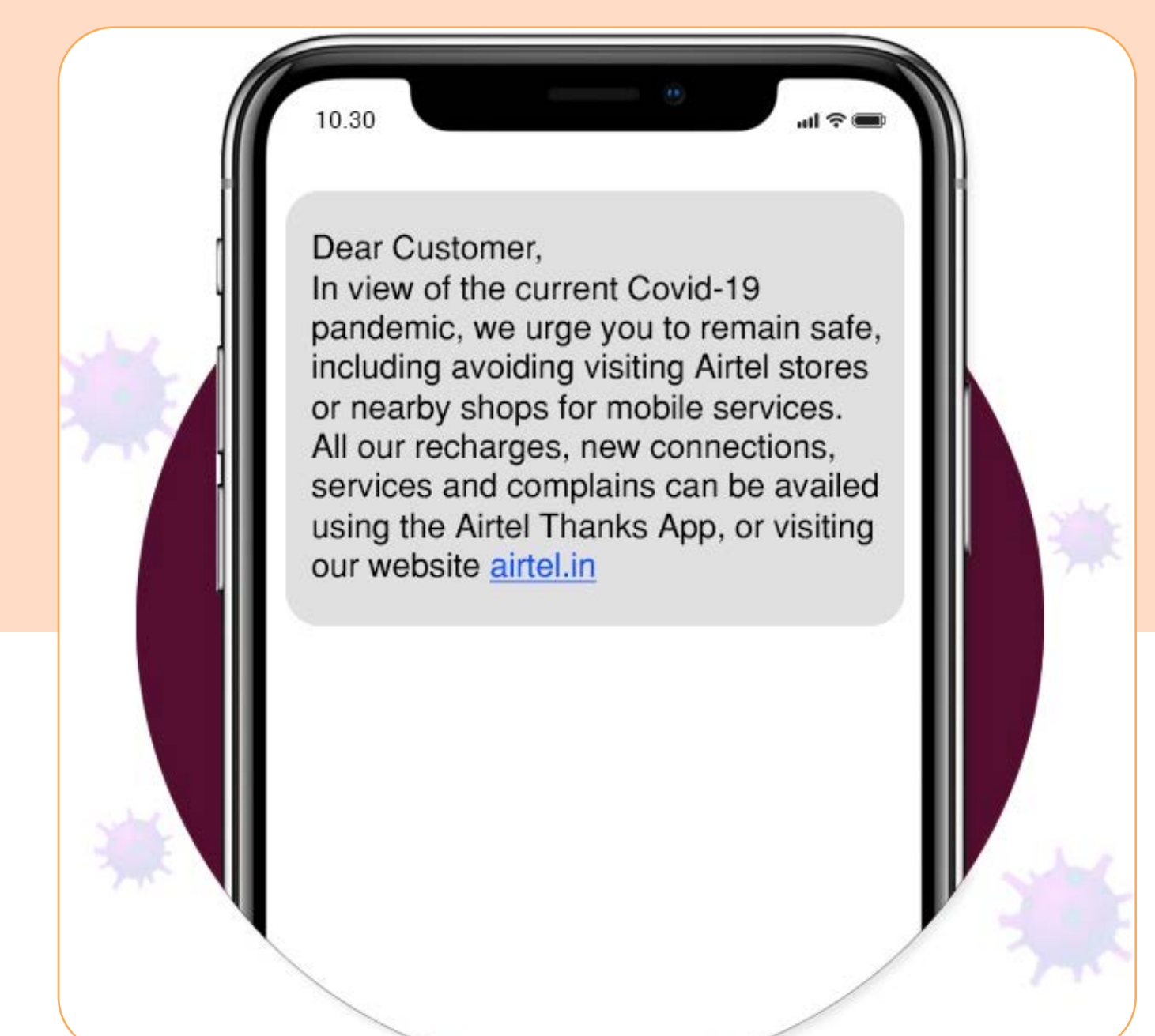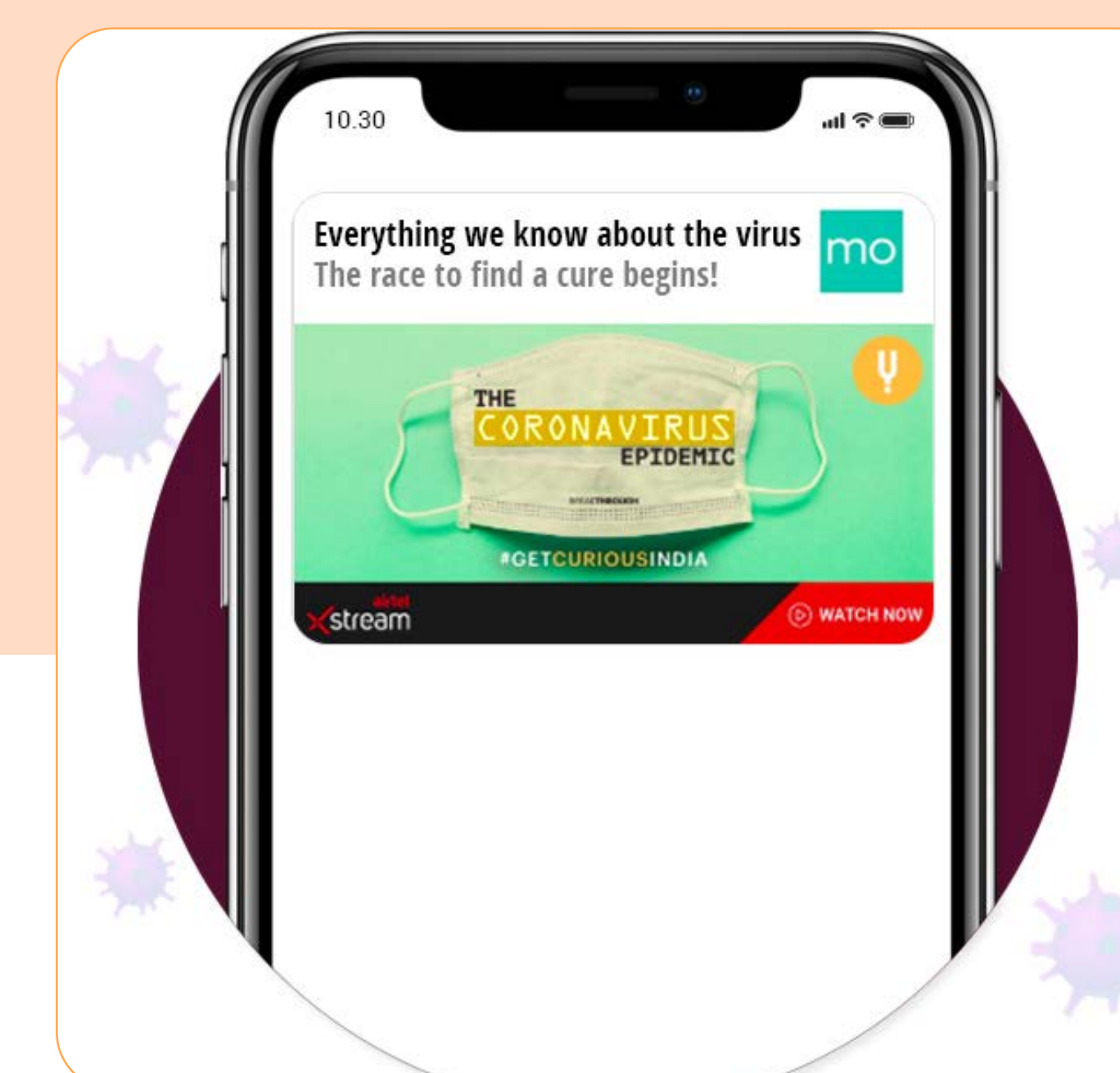
COVID-19 IMPACT QUADRANT

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)

GROWTH | EXPLOSION

Video Chat & Online Conference
SEA, NA, EU, IN, MEA

Online Shopping
NA, IN

Social
NA, EU, IN, MEA

Social
SEA

Healthcare
NA, EU, ME

Online Shopping
SEA, EU, MEA

Food Delivery
SEA, NA

Media & Entertainment
SEA, NA, EU, IN, MEA

Mobility
EU

Real Estate
MEA

Mobility
IN, NA

Mobility
SEA, MEA

Healthcare
IN

Real Estate
SEA, NA, EU, IN

Food Delivery
EU, IN, MEA

Travel & Hospitality
SEA, NA, EU, IN, MEA

Healthcare
SEA

Active Users

SLOWDOWN | EMERGENCE

Downloads

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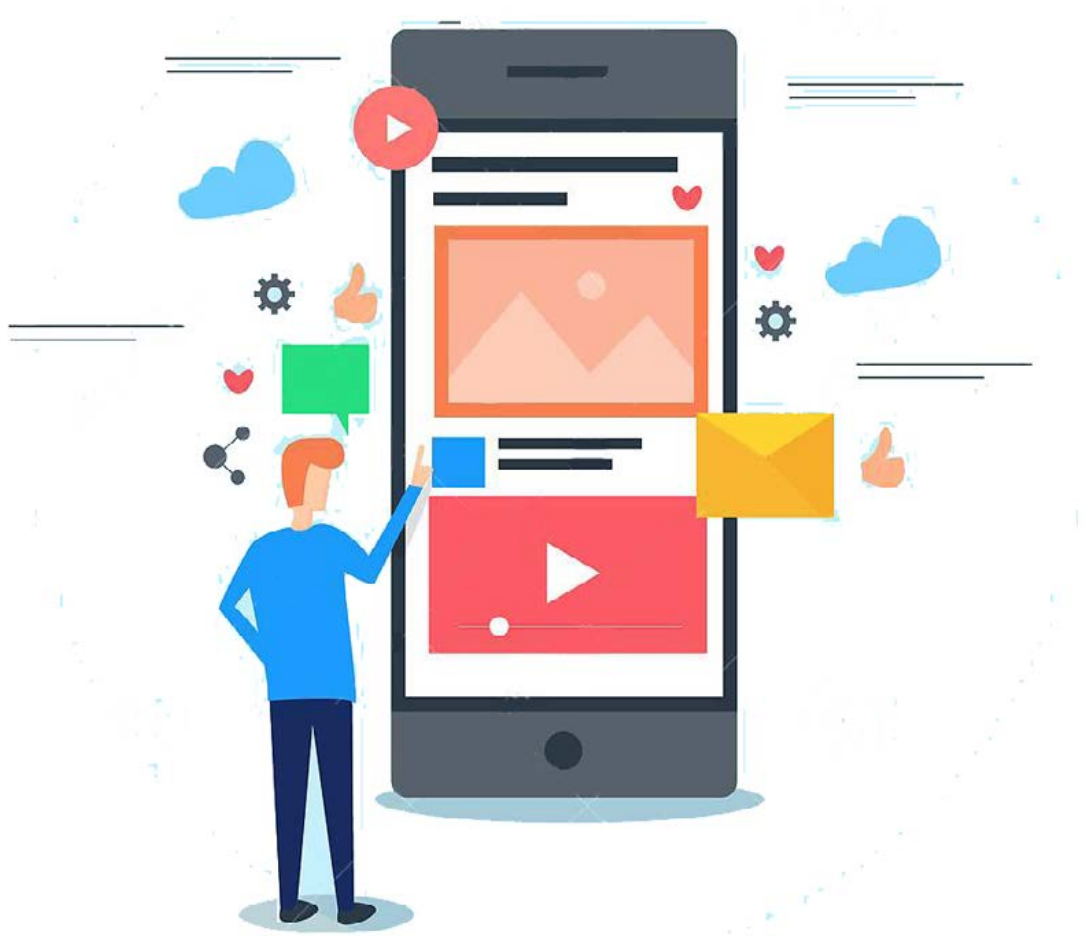
To increase active users, invest resources in curating bite-sized content that resonates with your users. Create videos, interactive carousels, quizzes, and image cards and host them on your app.

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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.
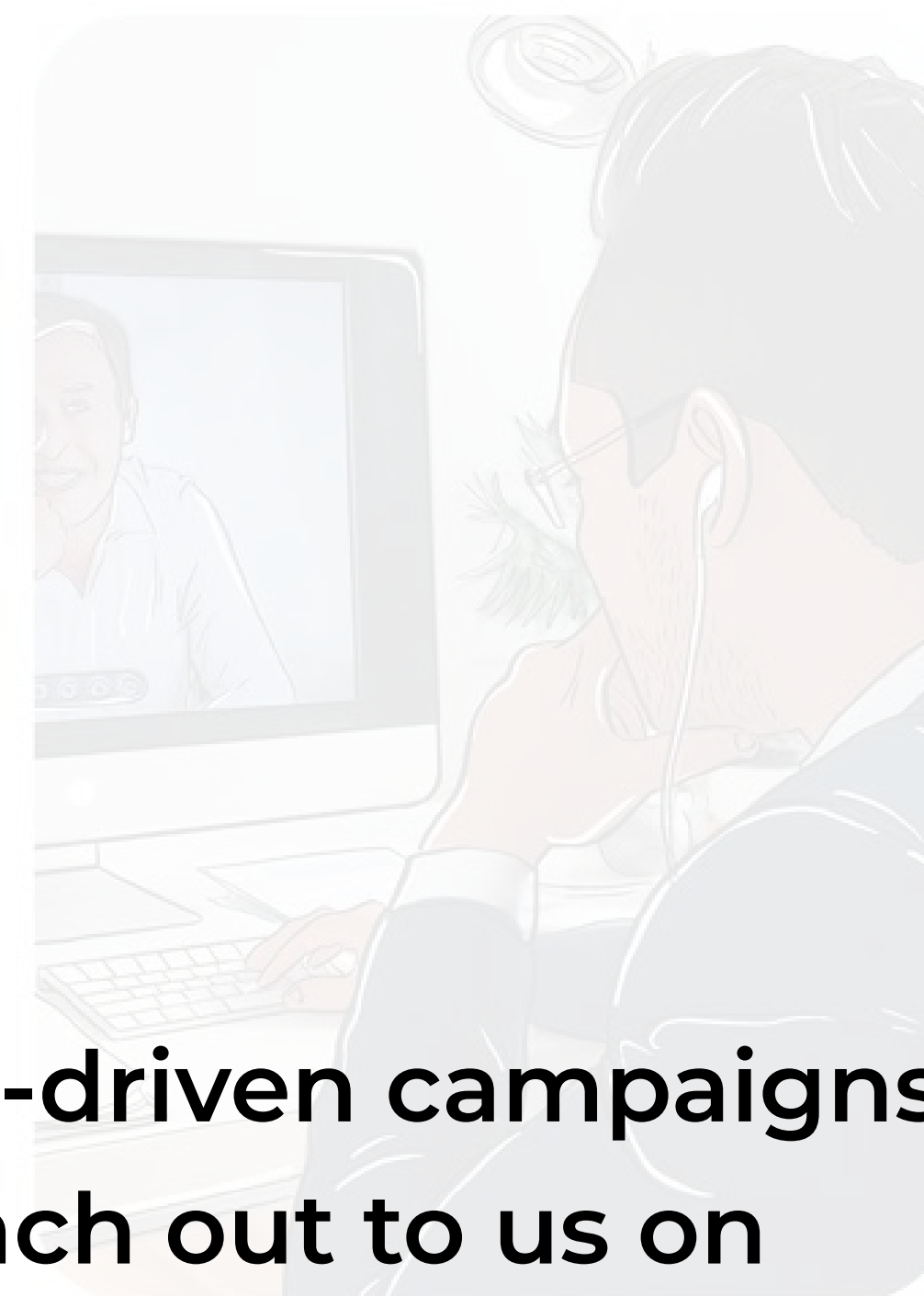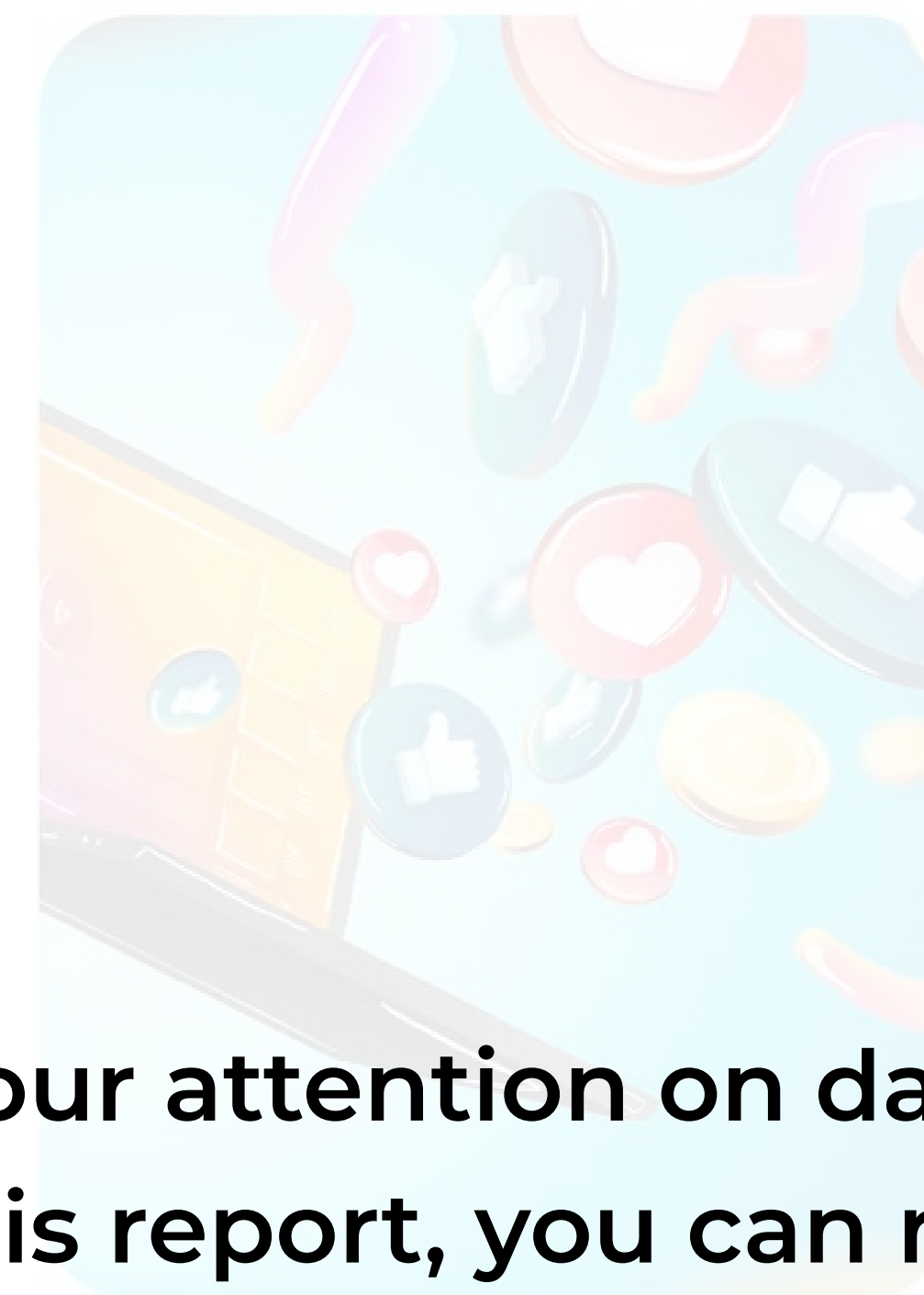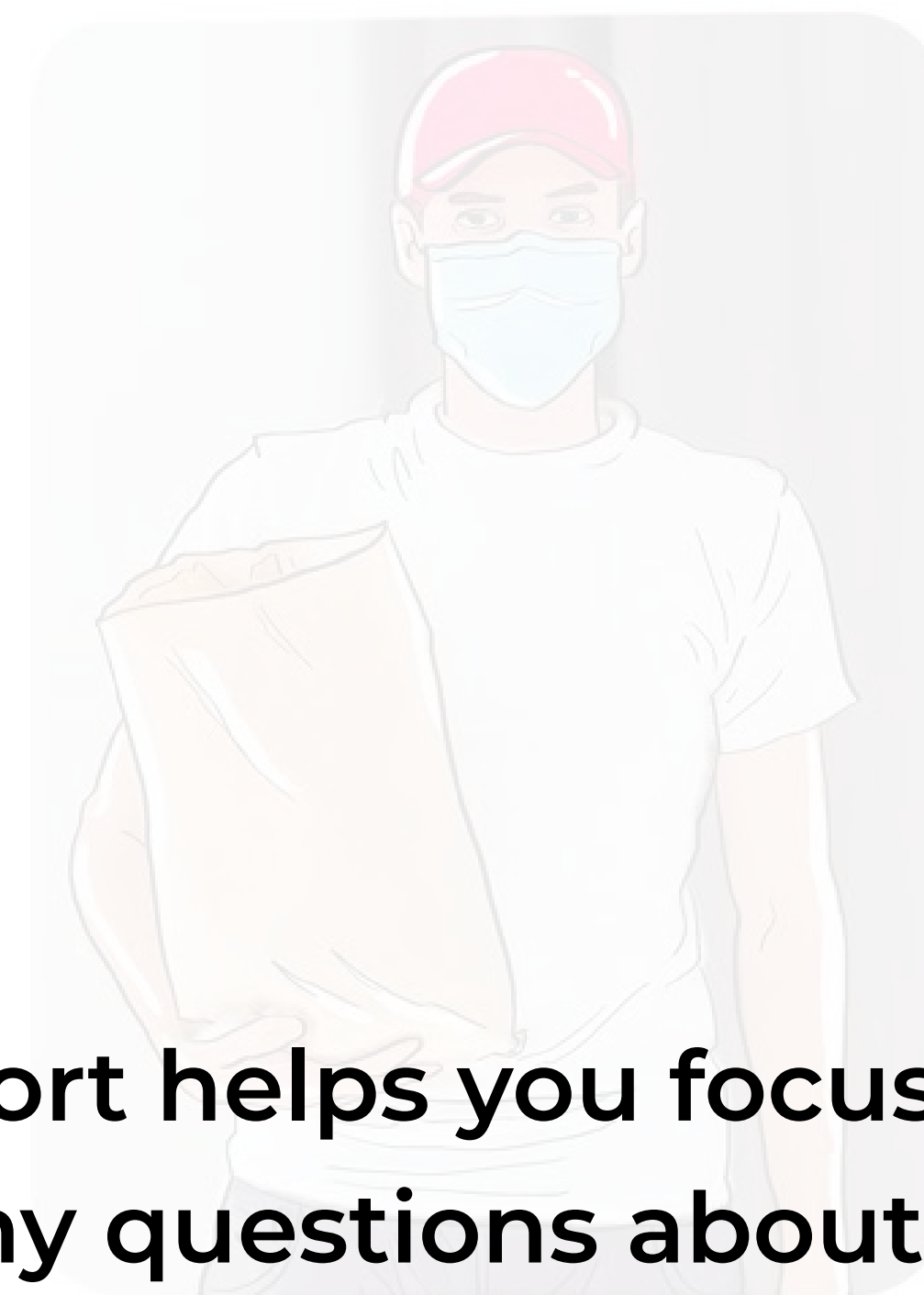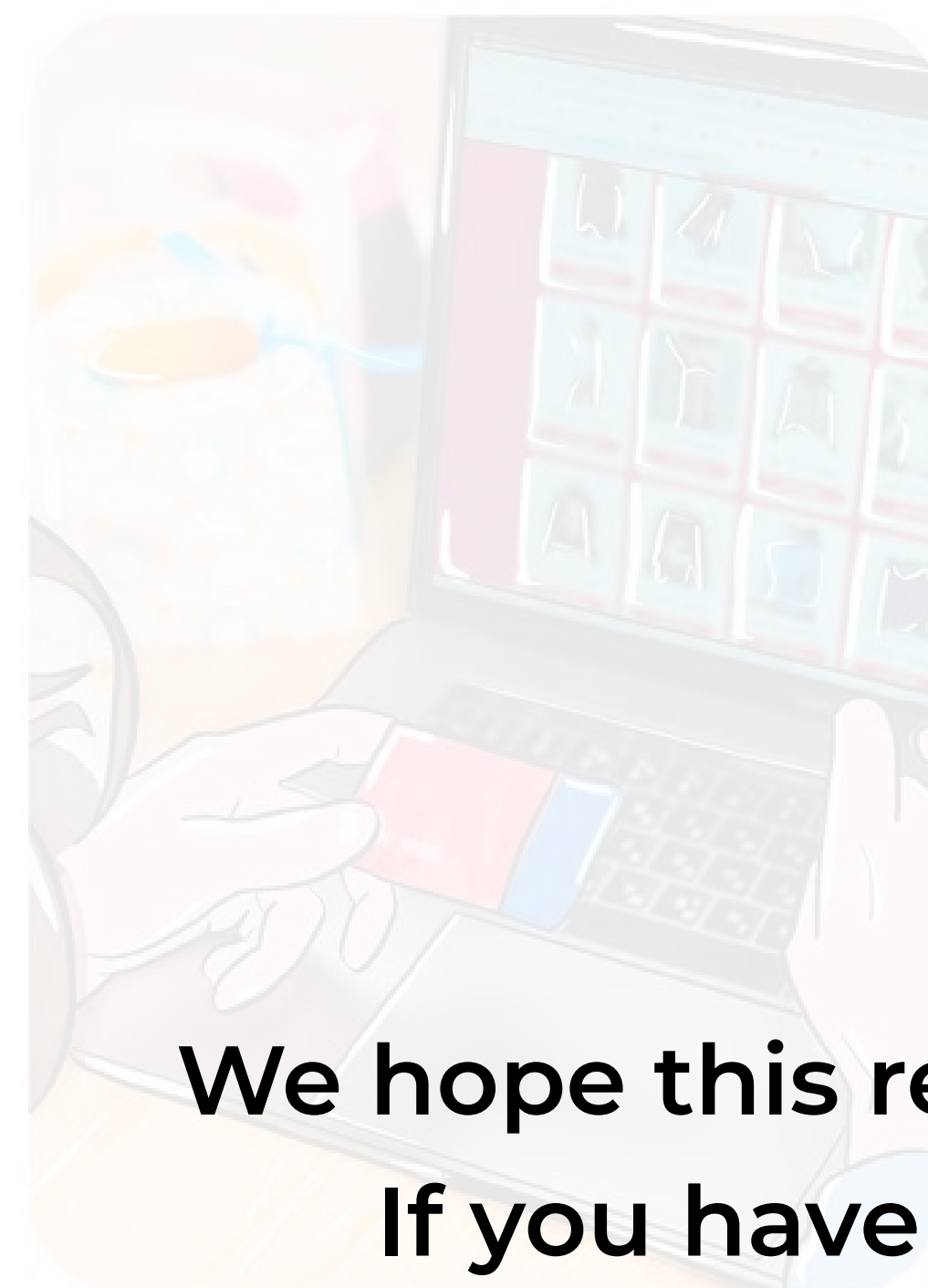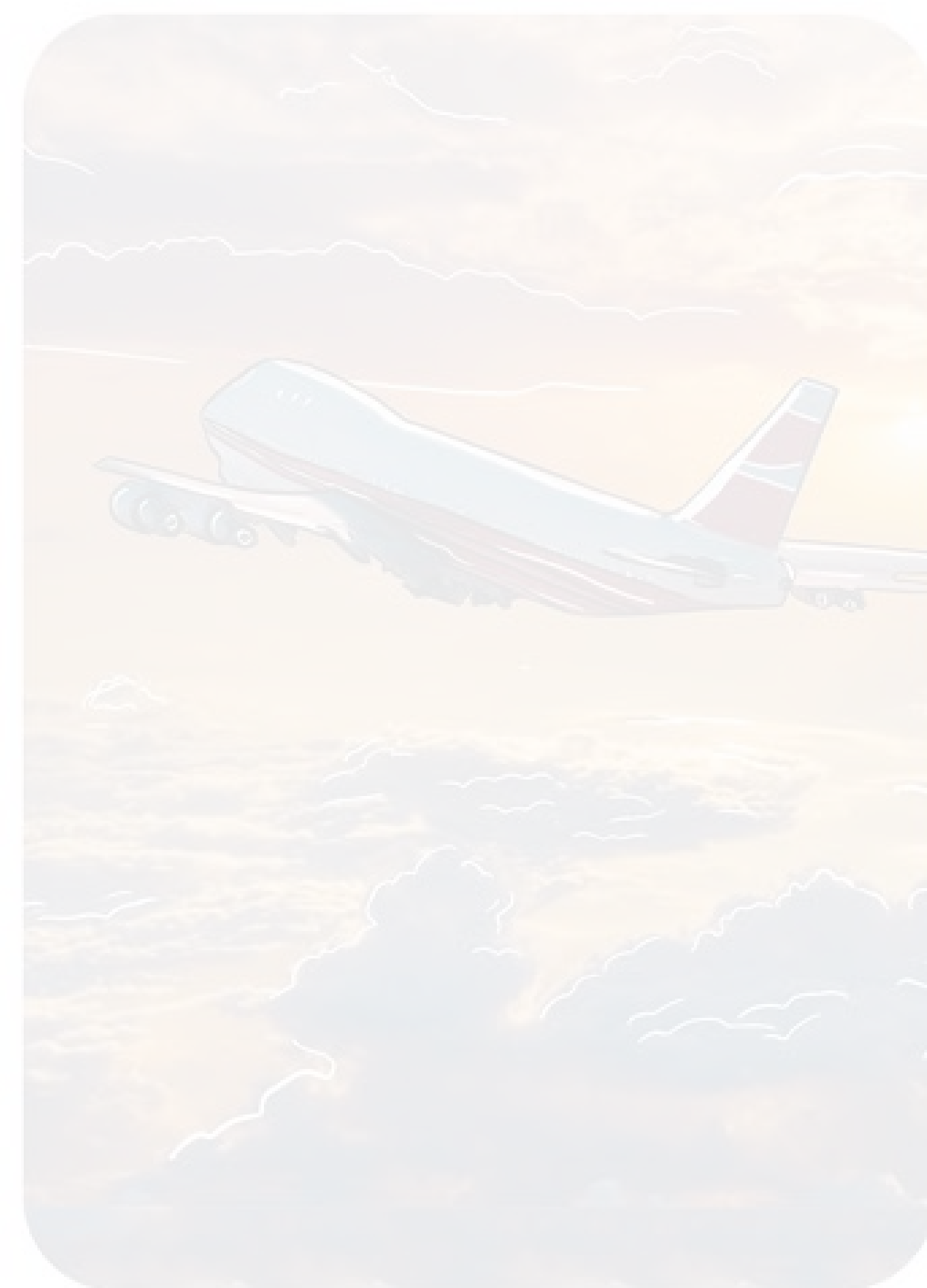
We hope this report helps you focus your attention on data-driven campaigns. If you have any questions about this report, you can reach out to us on content@moengage.com