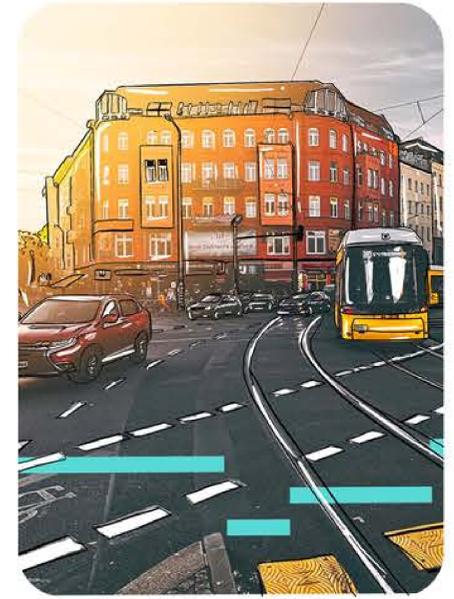


CORONAVIRUS BUSINESS IMPACT

Data-driven insights for
brands during COVID-19

moengage |  apptopia



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

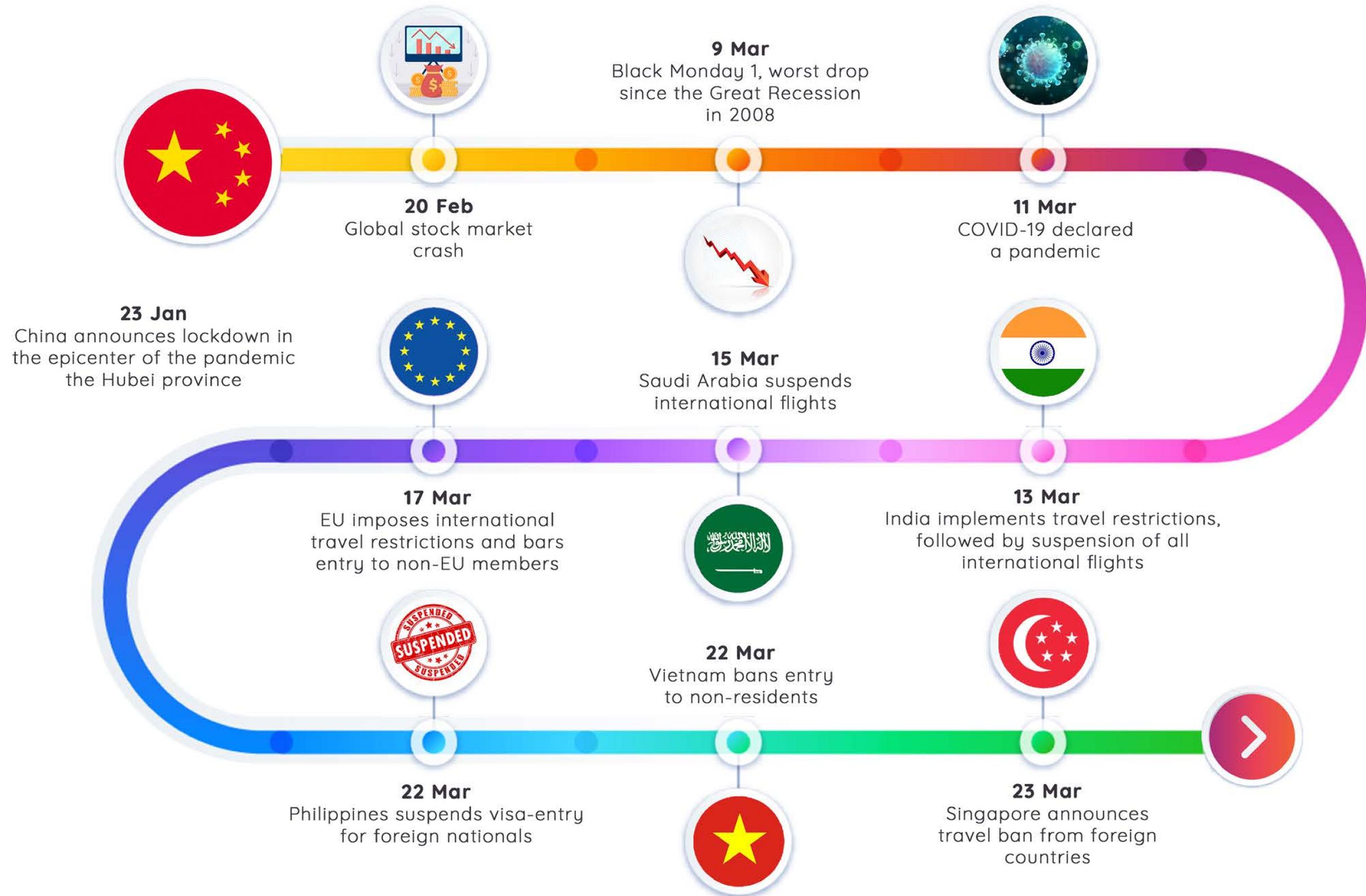
Businesses worldwide are learning how to deal with this ‘Black Swan’ event and trying to connect to their customers and even realign their strategies. In such times, it is important to reflect and understand that it is not the strongest who withstand the storm but the ones who can think on their feet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





MOBILITY

NORTH AMERICA

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

MIDDLE EAST

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

INDIA

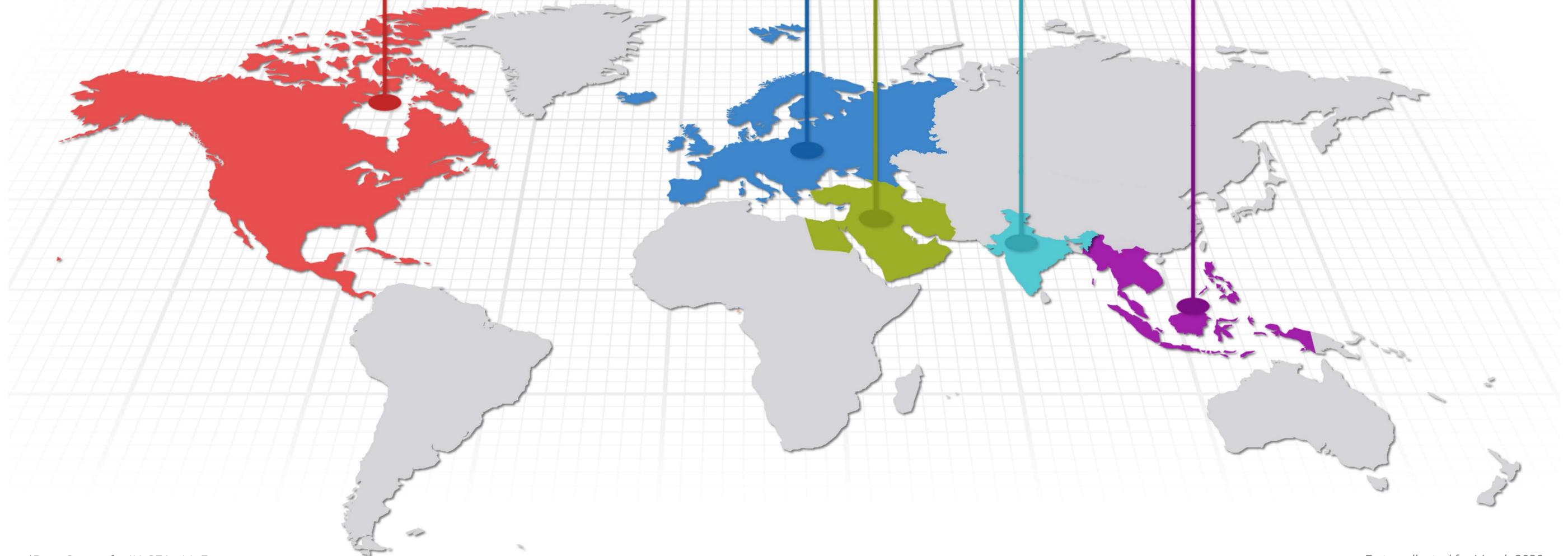
Downloads **-80.05%**
DAU **-40.00%**

EUROPE

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

SOUTH EAST ASIA

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



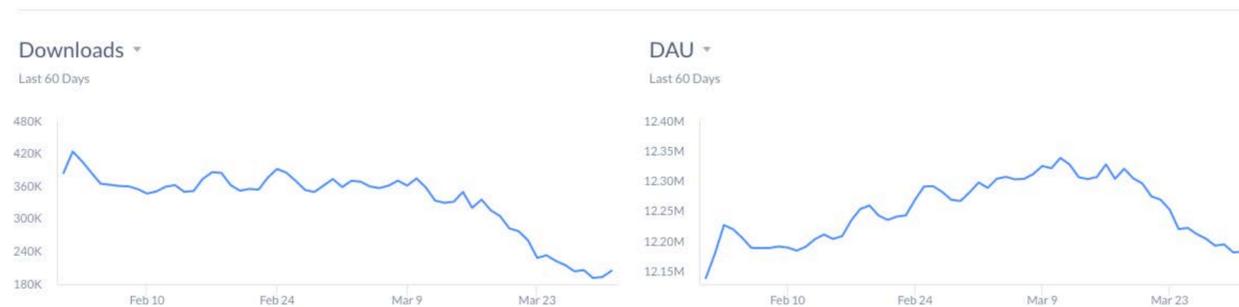
*Data Source for IN, SEA - MoEngage
*Data Source for NA, EU, MEA - Apptopia

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



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.

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

UNITED STATES

2.5 million, -7.7%

BRAZIL

1.4 million, -27.2%

INDIA

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

3.7 million, -5.6%

CANADA

163,100, -18.5%

CHINA

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

Downloads: 341,000, -22.8%

DAU: 250,800, -34.7%

GERMANY

Downloads: 181,000, -31.9%

DAU: 158,900, -36.5%

FRANCE

Downloads: 102,200, -56.7%

DAU: 81,500, -34.8%

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.



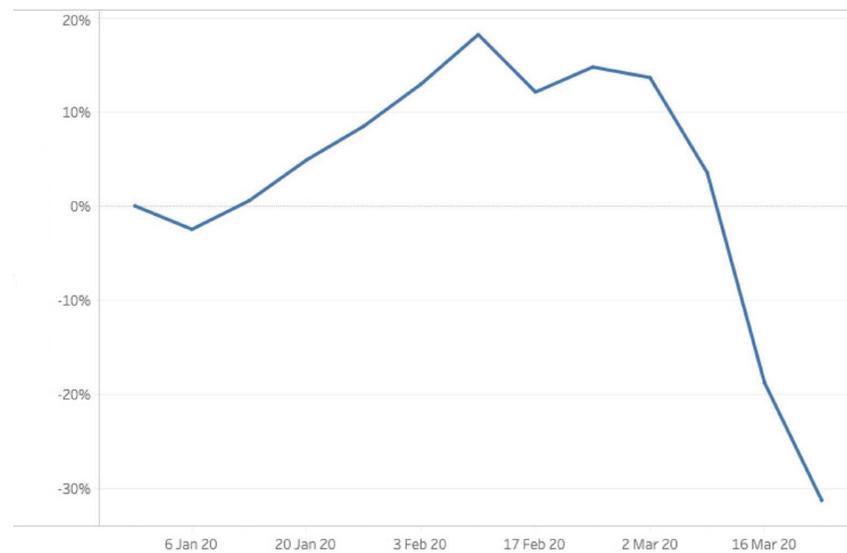
Lime in Korea - data for last 60 days

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

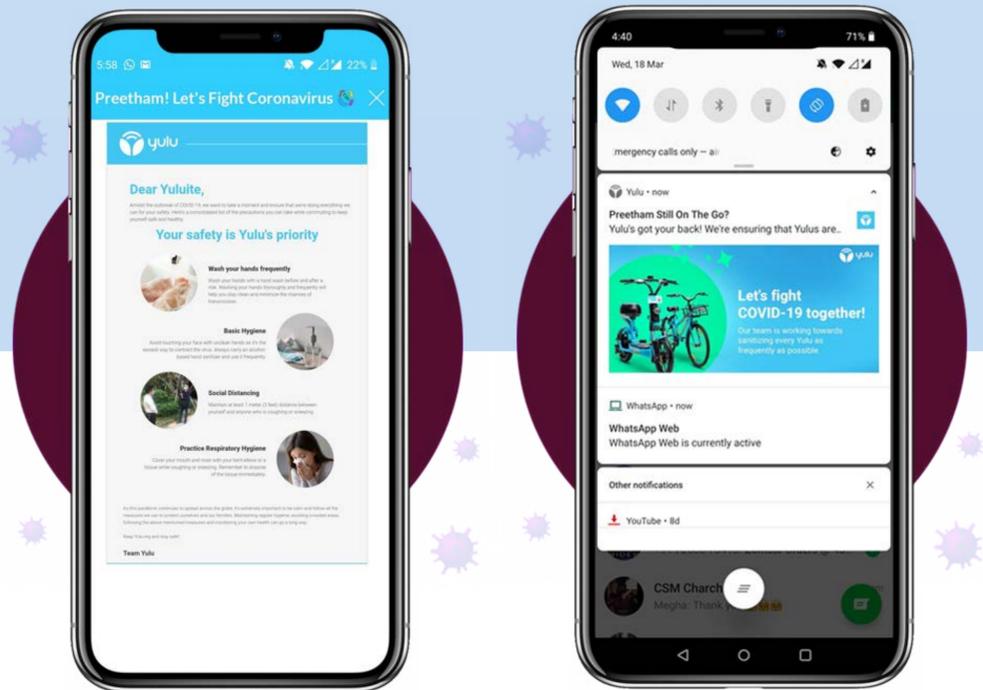


Combined fall of 80% in confirmed rides in the last 90 days for mobility apps in India



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%

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:

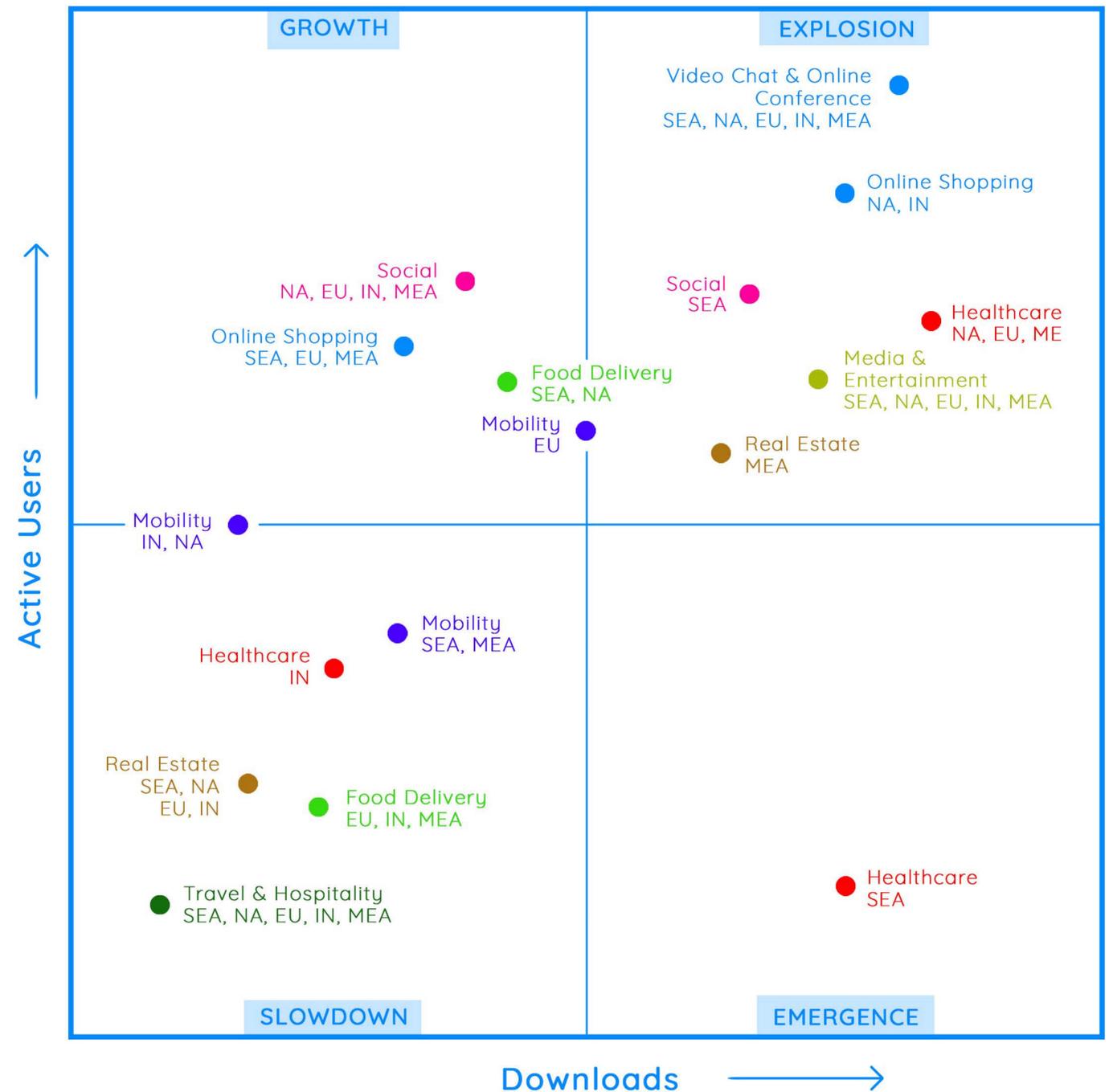
- Social Media (North America, Europe, India, & Middle-East)
- Online Shopping (Southeast Asia, Europe, Middle-East Asia)
- Food Delivery (Southeast Asia, North America)

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



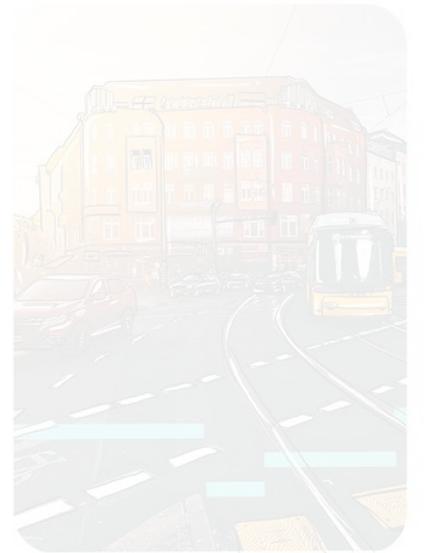
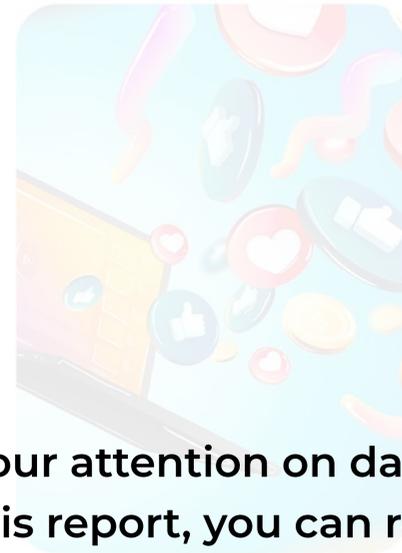
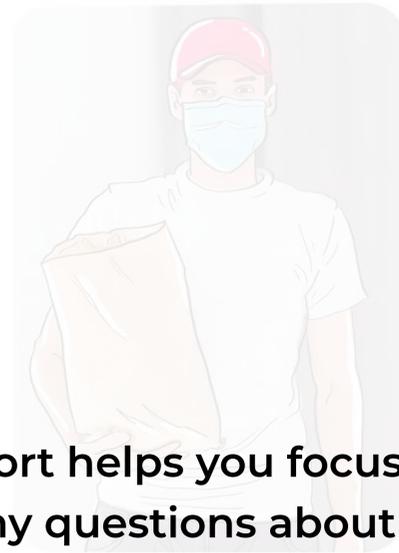
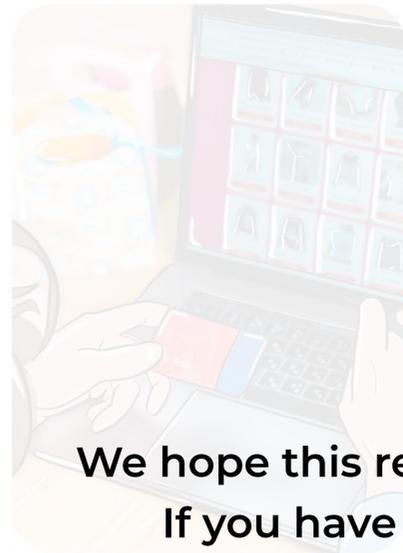
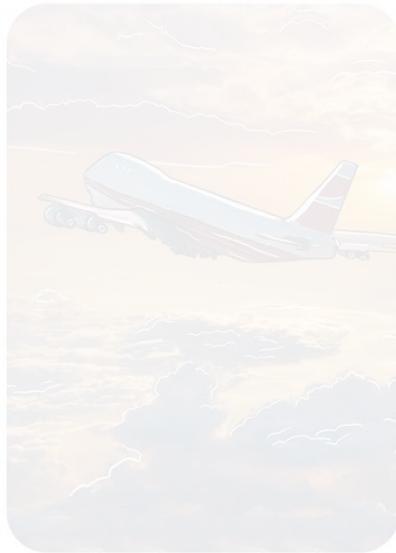
To increase active users, invest resources in curating bite-sized content that resonates with your users. Create videos, interactive carousels, quizzes, and image cards and host them on your app.

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

