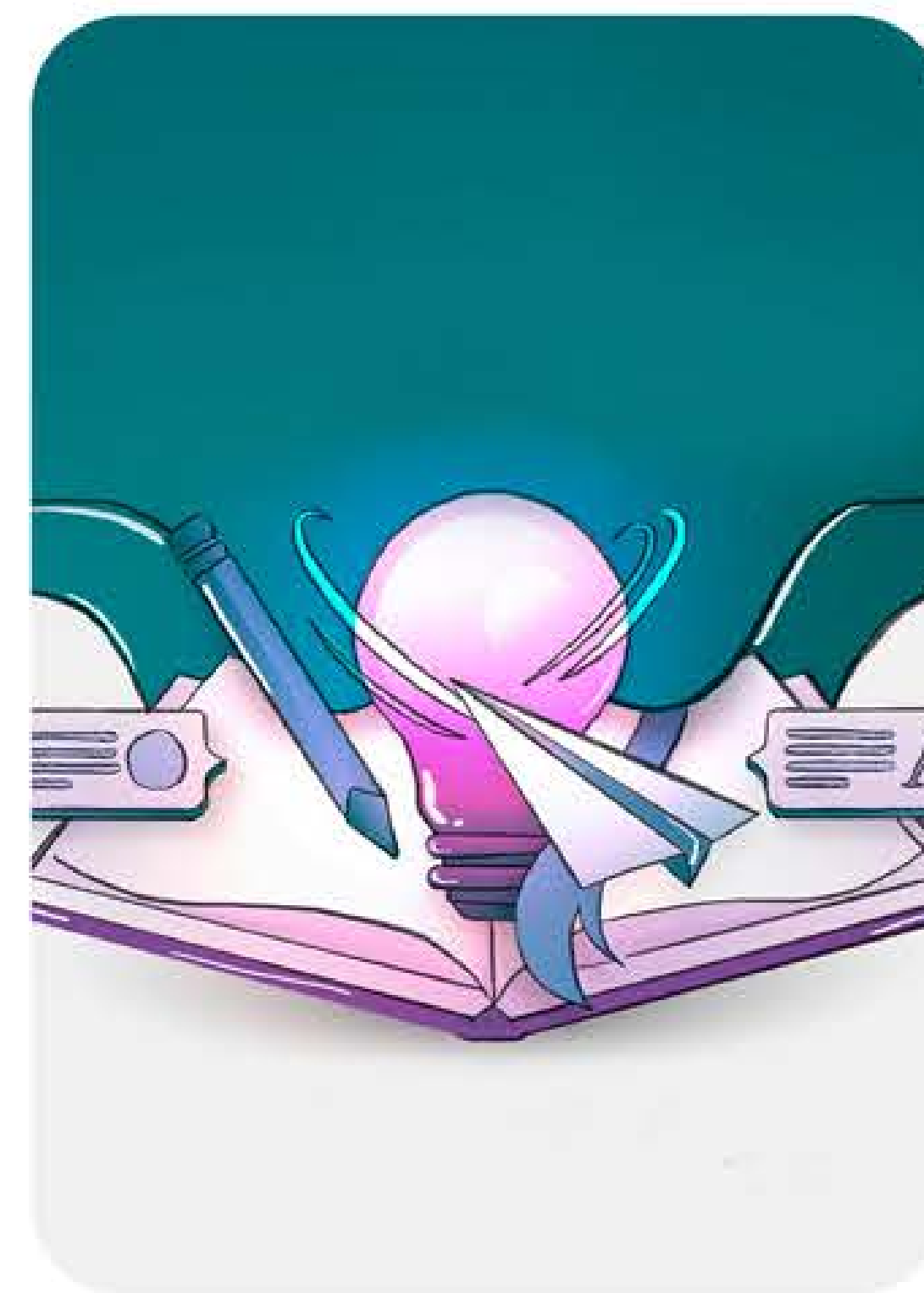
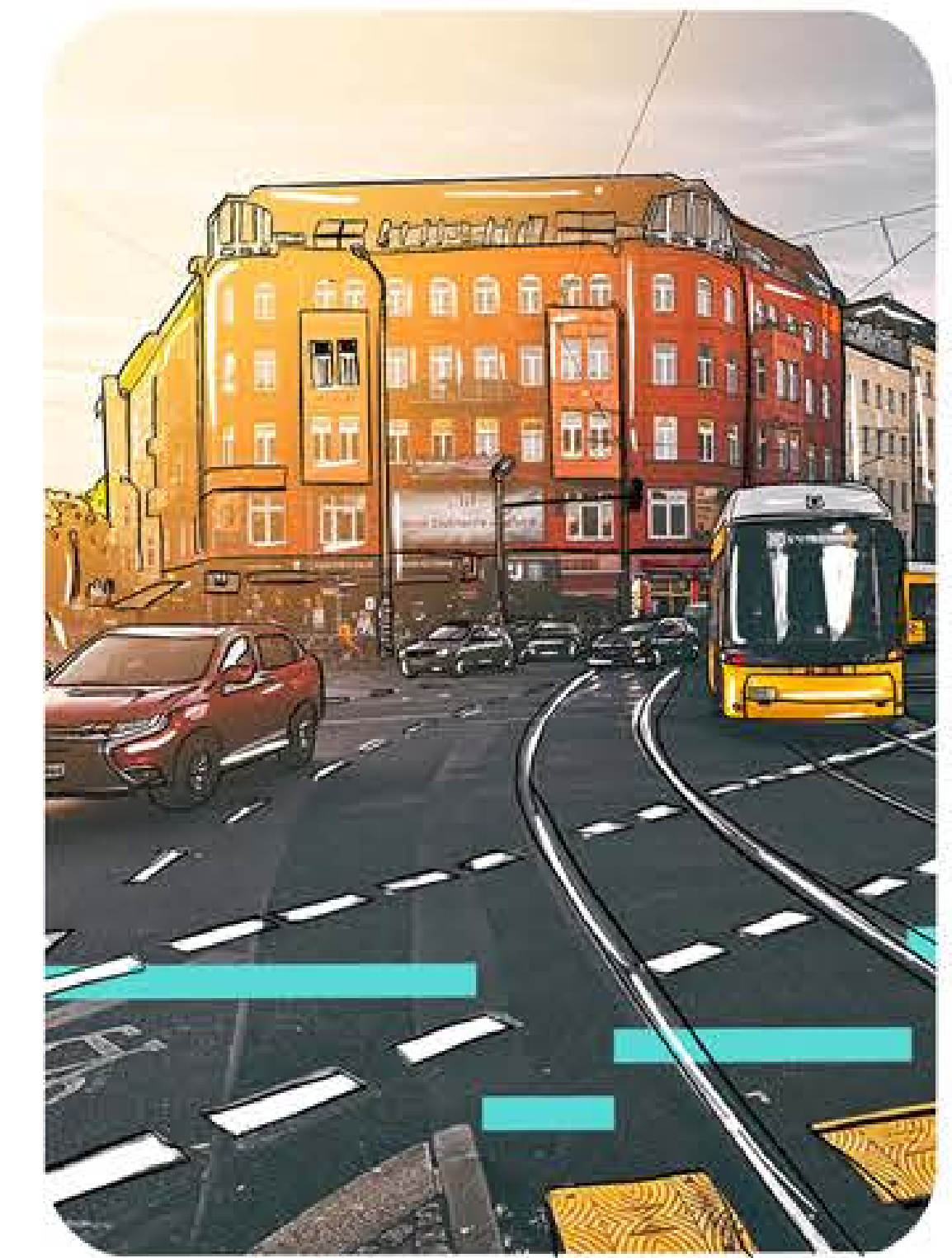


CORONAVIRUS BUSINESS IMPACT

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

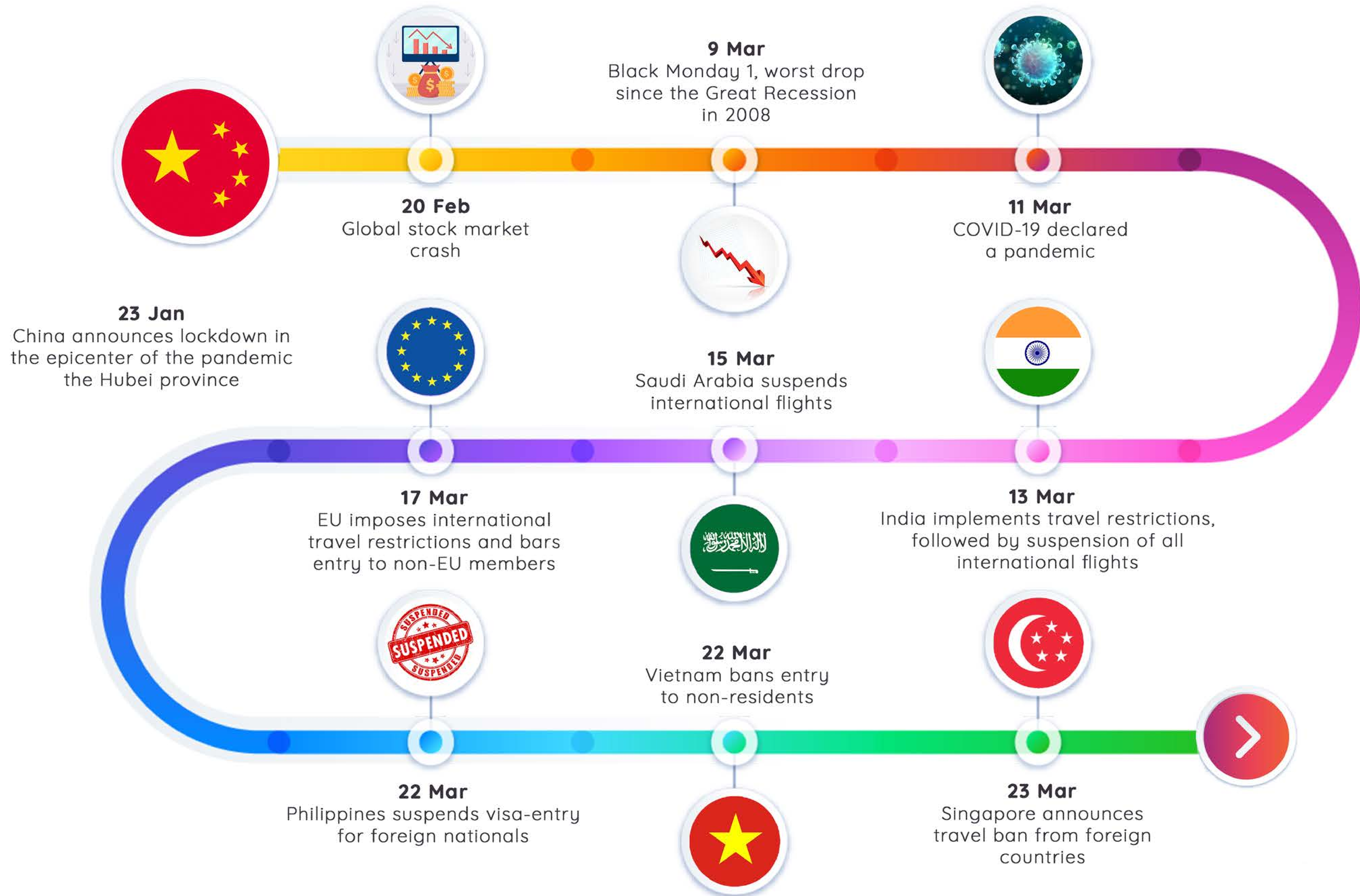
Businesses worldwide are learning how to deal with this ‘Black Swan’ event and trying to connect to their customers and even realign their strategies. In such times, it is important to reflect and understand that it is not the strongest who withstand the storm but the ones who can think on their feet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





TRAVEL & HOSPITALITY

NORTH AMERICA

Downloads -12.05%
DAU -1.85%

MIDDLE EAST

Downloads -34.95%
DAU -11.65%

INDIA

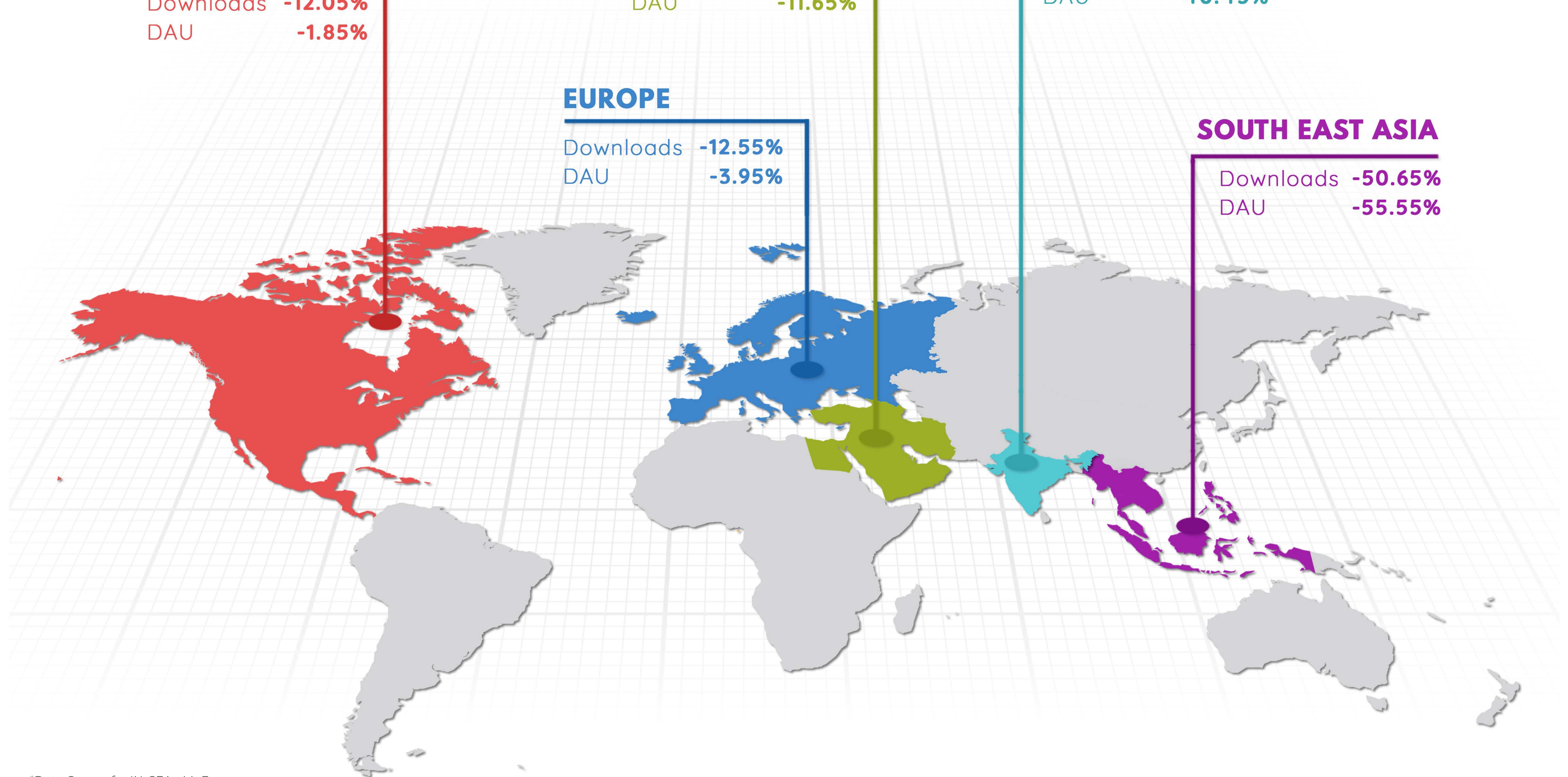
Downloads -90.60%
DAU -40.45%

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



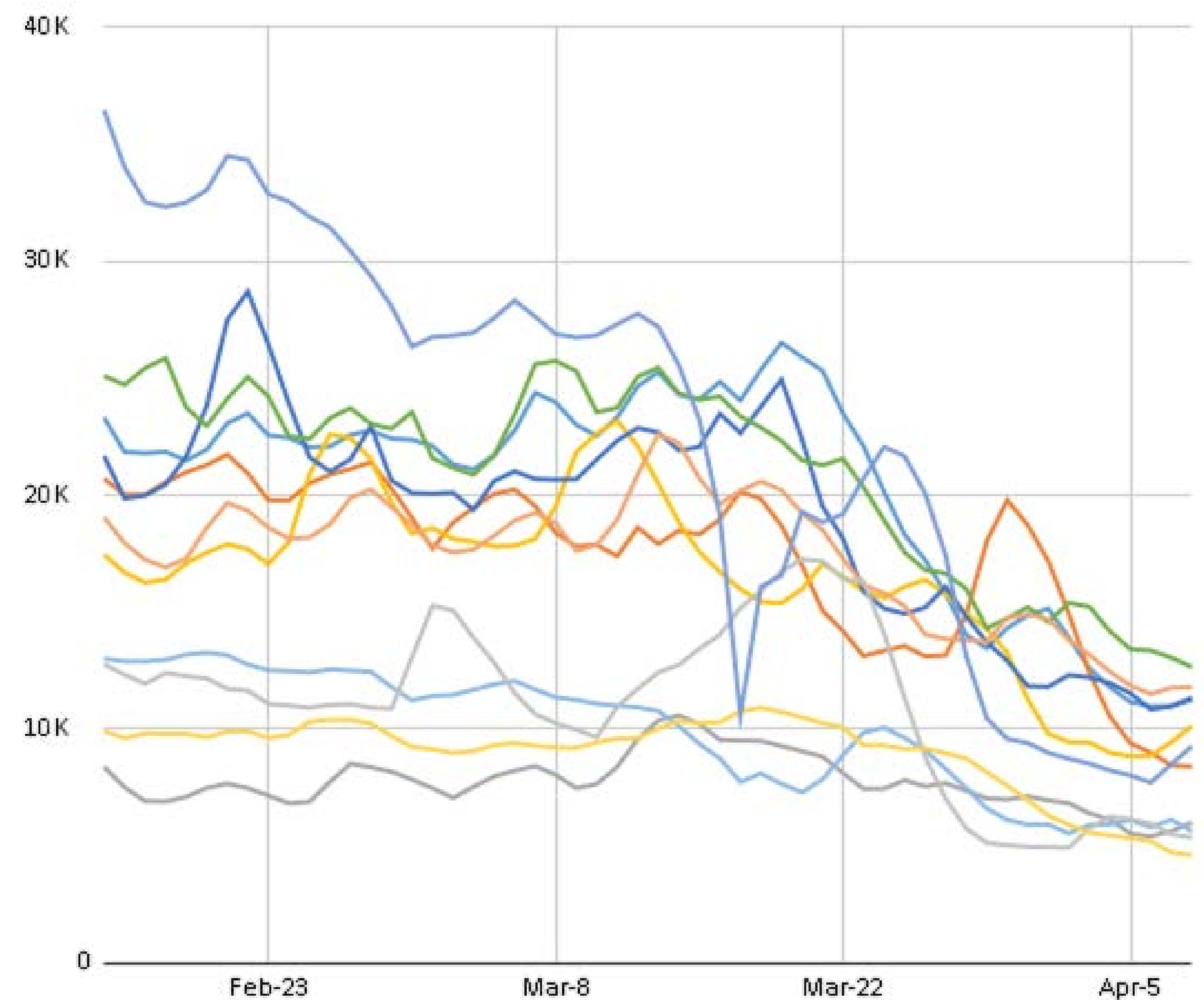
WORLDWIDE TRENDS IN AIRLINES

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.



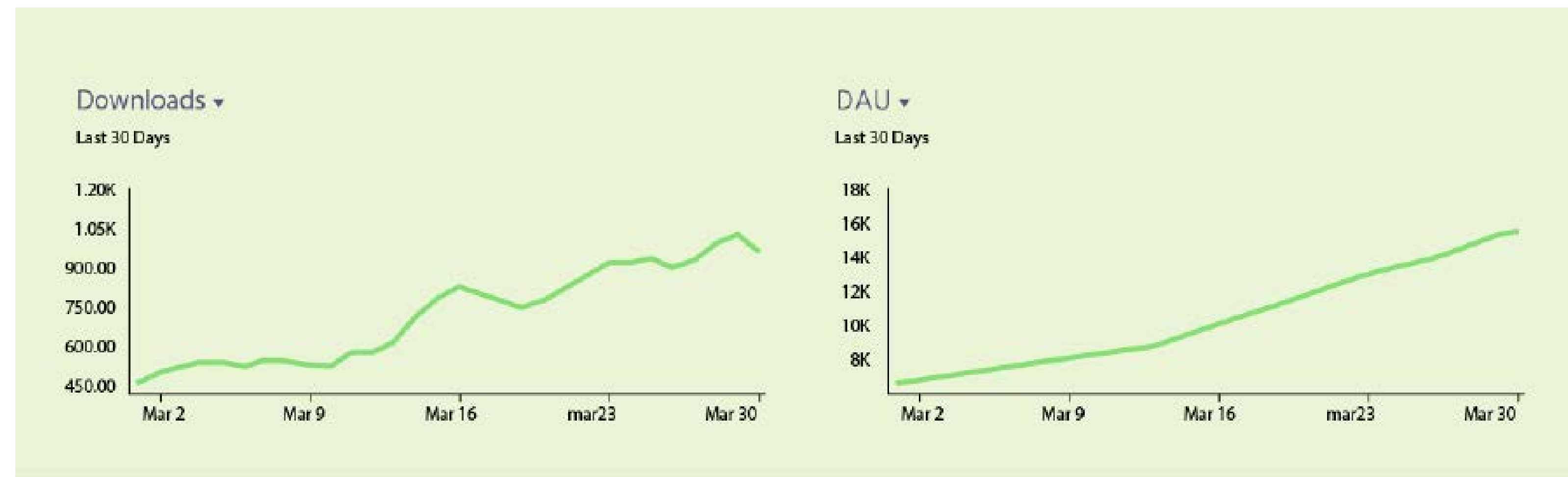
- United Airlines (App)
- easyJet: Travel App (App)
- JetBlue - Book & manage trips (App)
- AirAsia (App)
- Southwest Airlines (App)
- Wizz Air (App)
- Fly Delta (App)
- Emirates (App)
- British Airways (App)
- Ryanair (App)

App download trends for top 10 airlines by traffic volumes worldwide

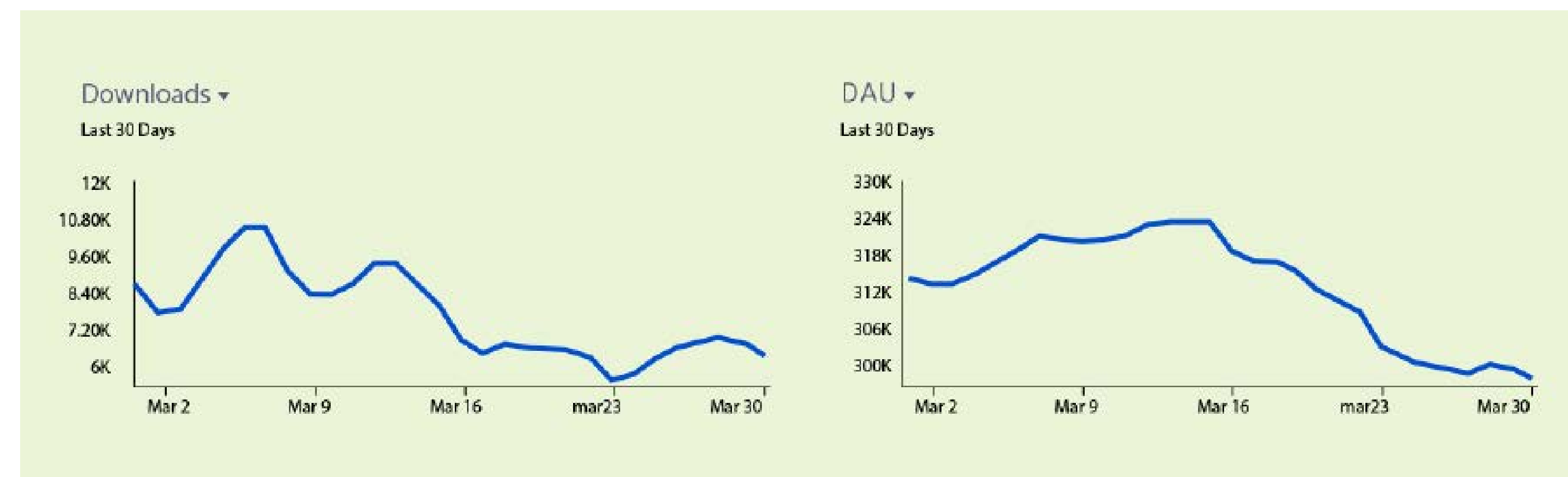
DID YOU KNOW?

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.**

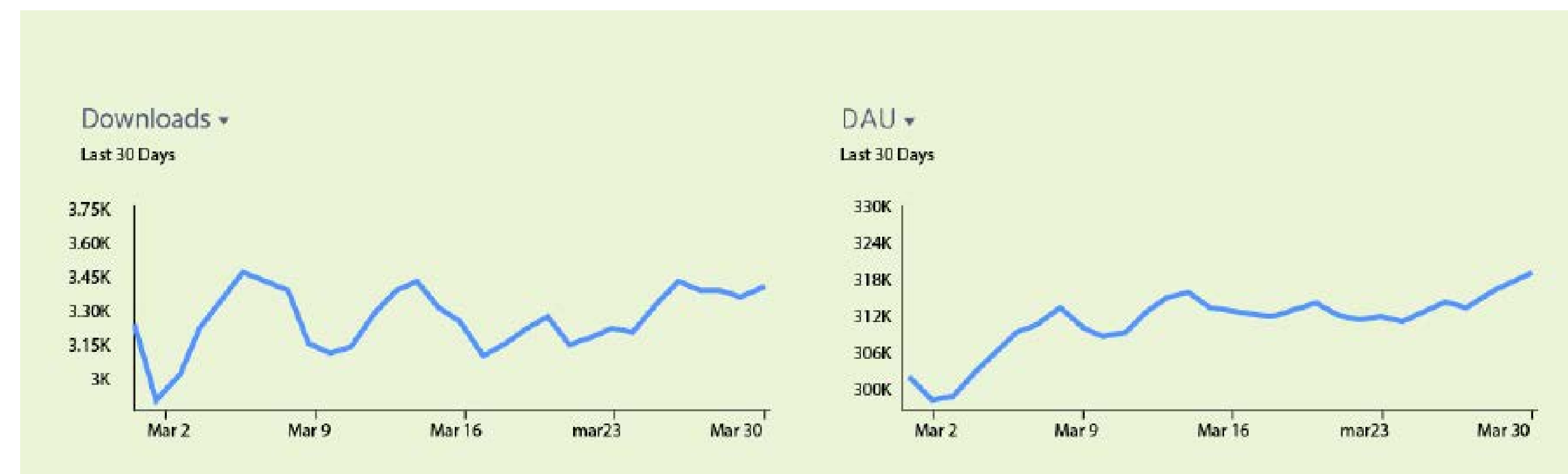
WORLDWIDE TRENDS IN HOTEL INDUSTRY



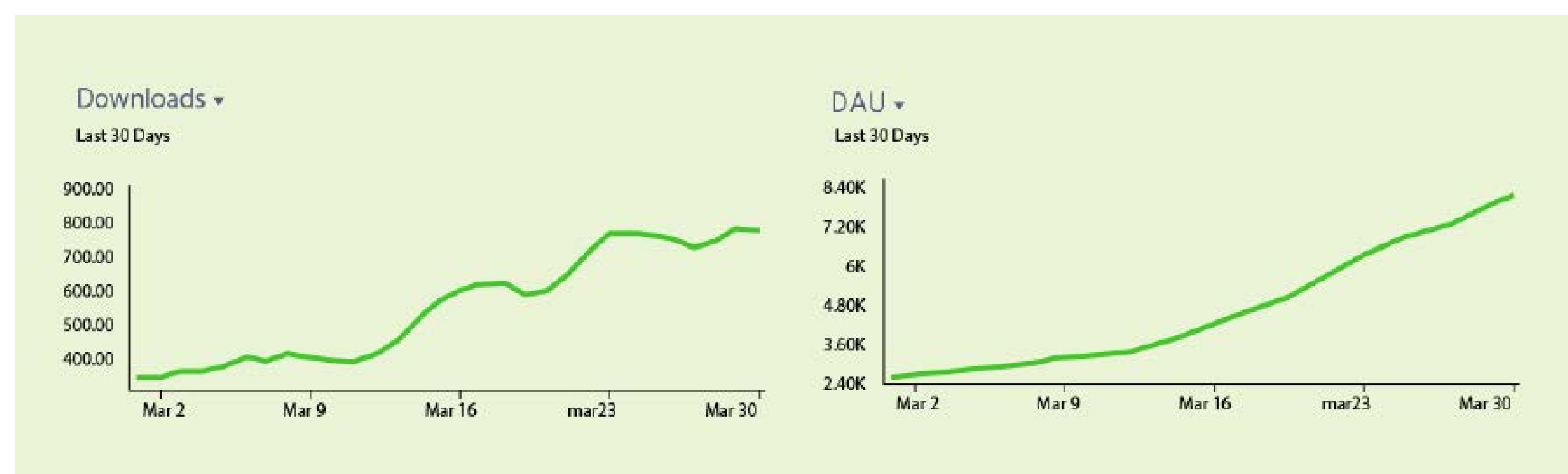
App downloads and DAU for FedEx in China



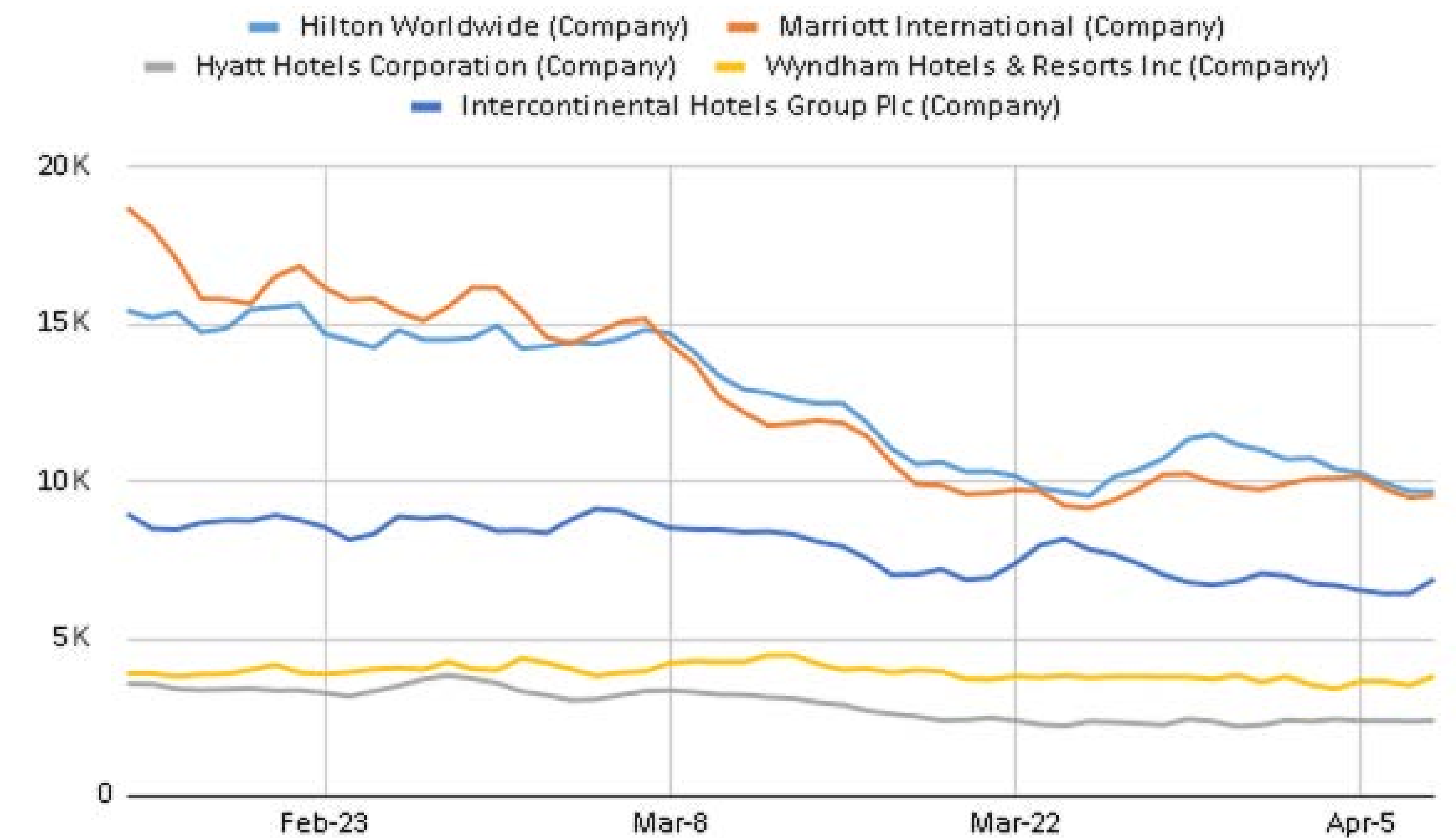
App downloads and DAU for FedEx worldwide



App downloads and DAU for DHL worldwide

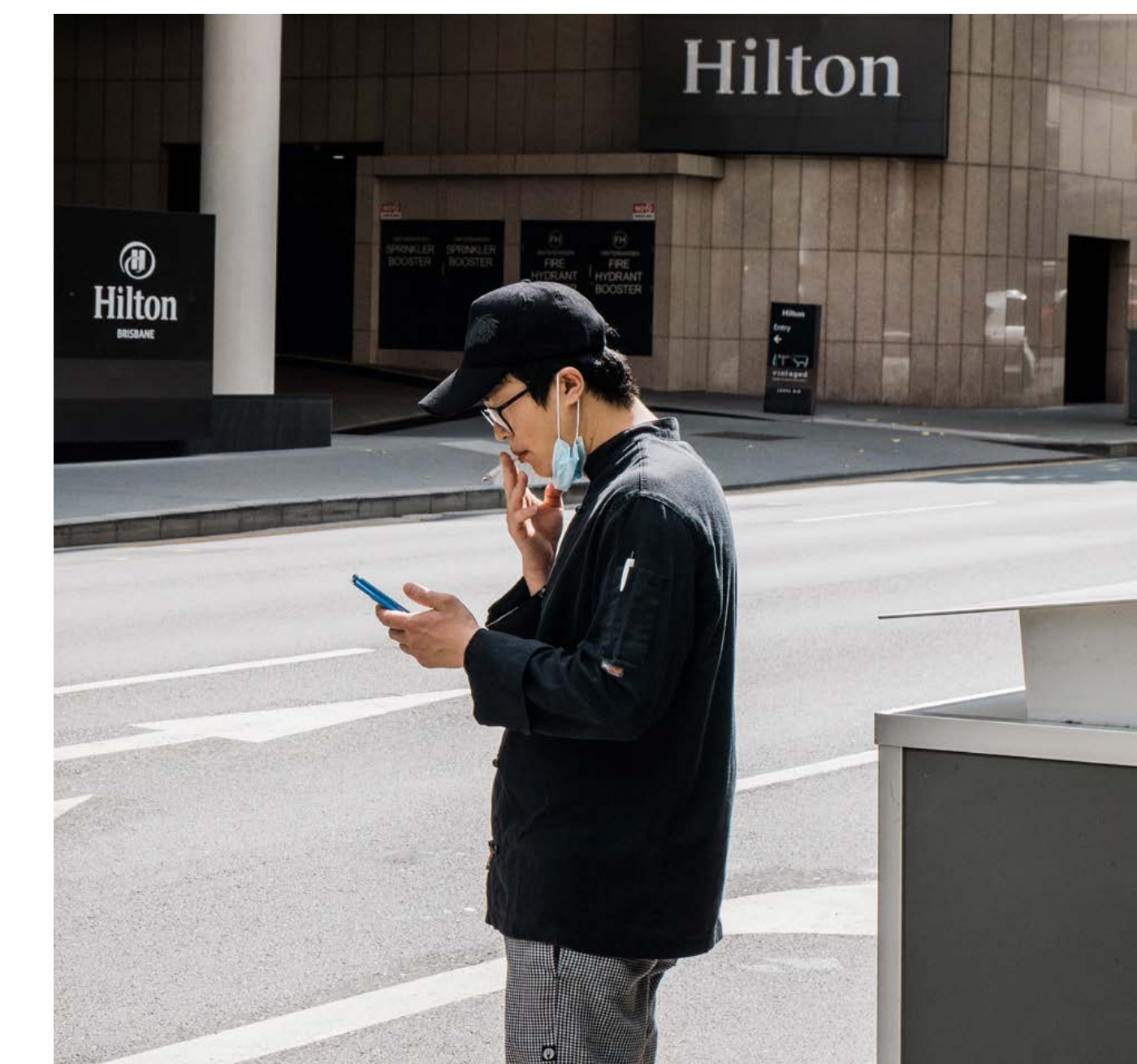


App downloads and DAU for DHL in China



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?

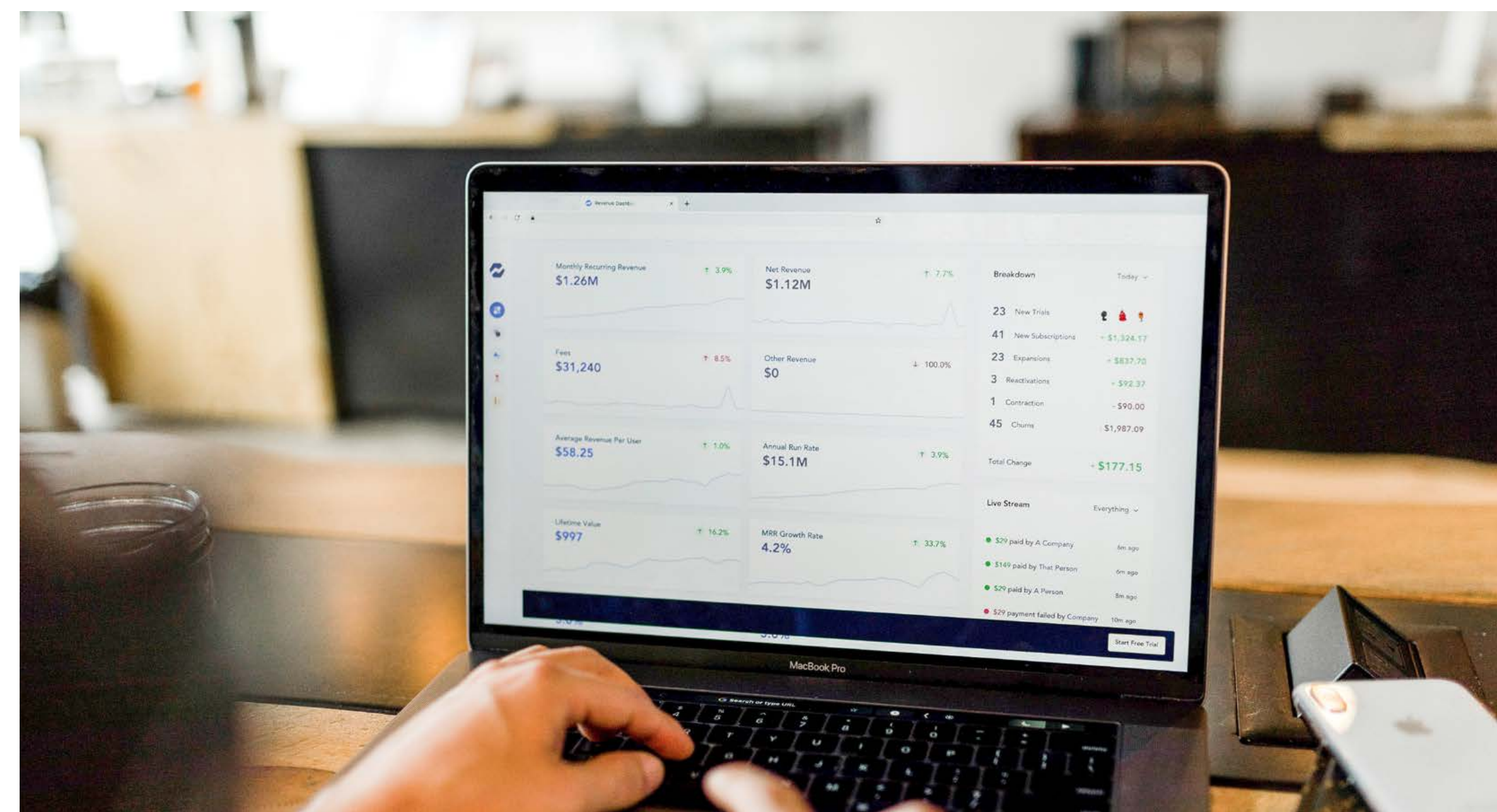
China serves as Marriott International's second biggest geography in terms of DAU, after the United States. **The hotel chain sees a decline in DAU in China as early as mid-January.**

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.

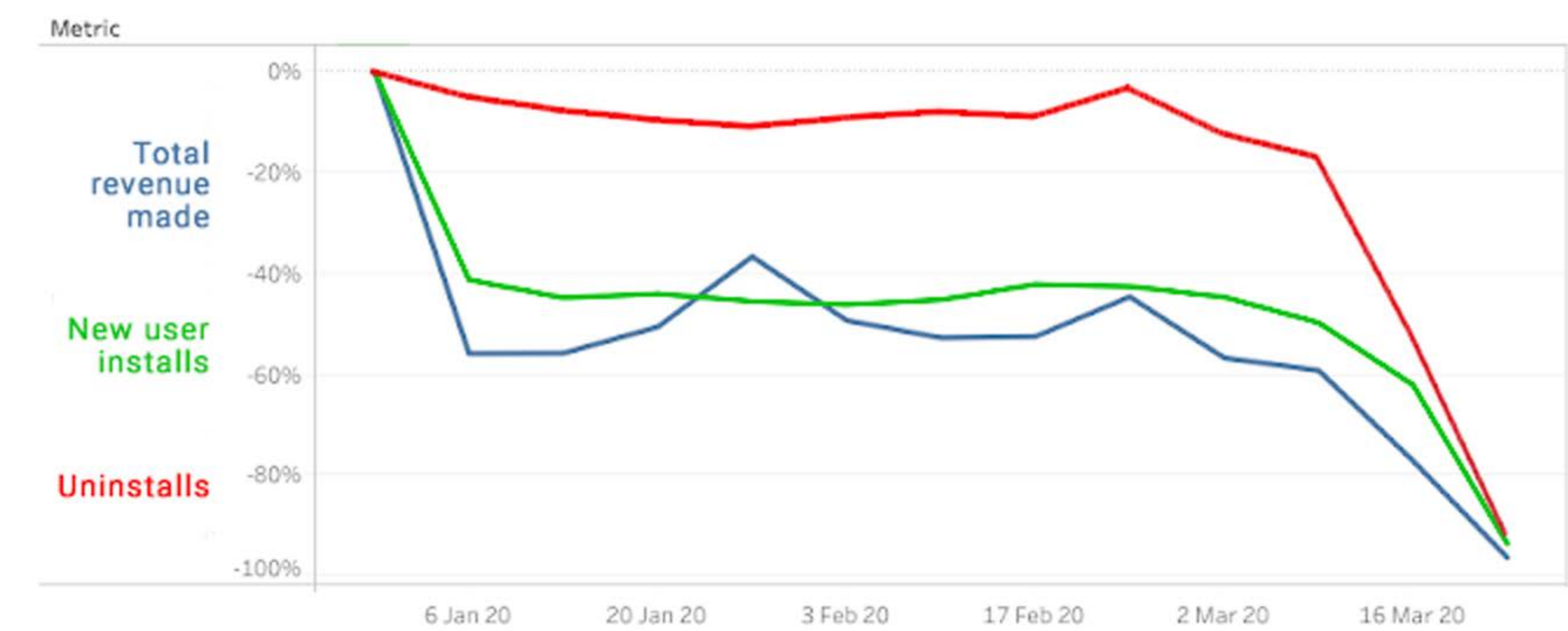


DID YOU KNOW?

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

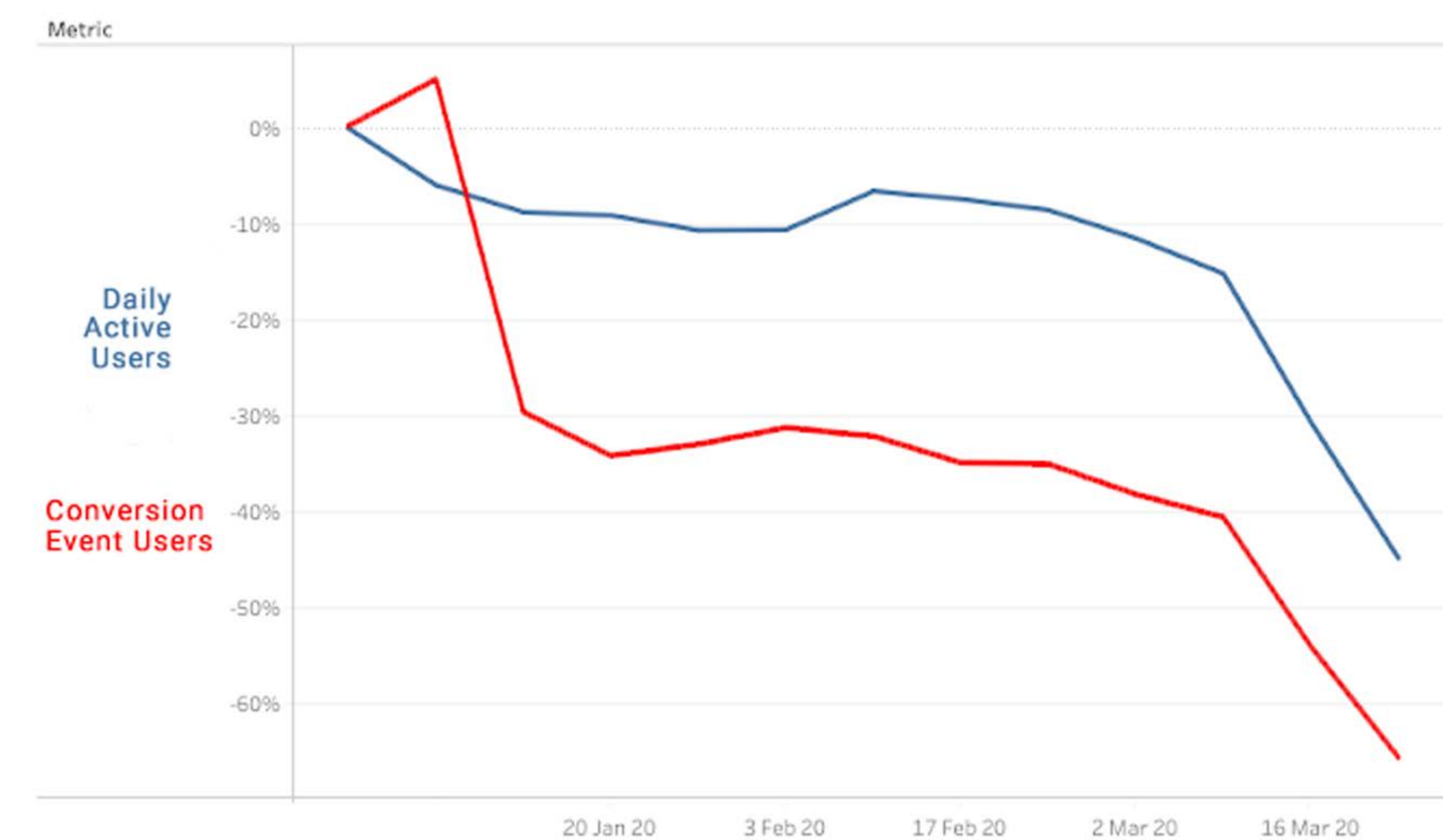
INDIA

Metric Trends Weekly - Sum



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

Metric Trends Weekly - Avg



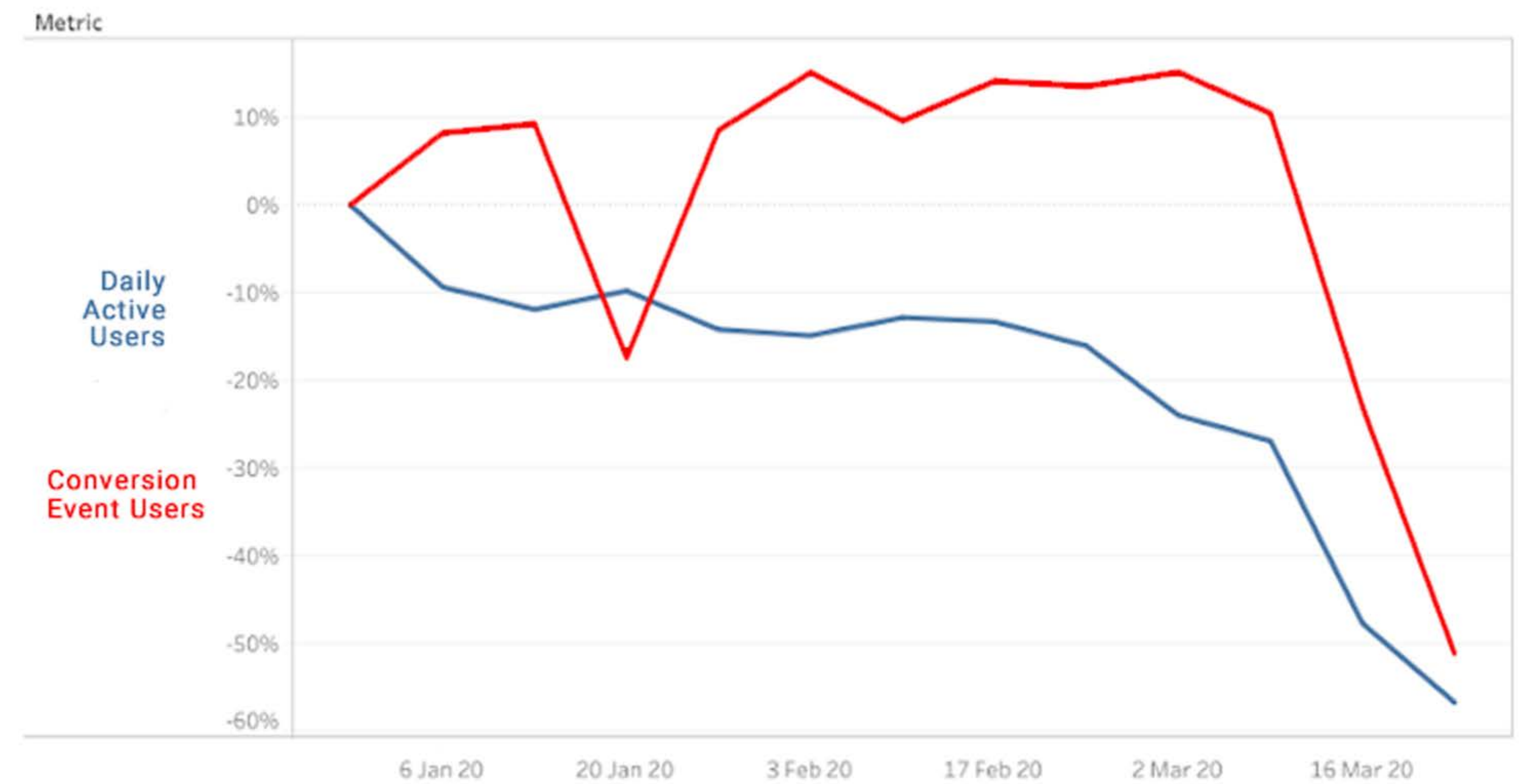
DAU and purchase activities made within travel apps in India

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.

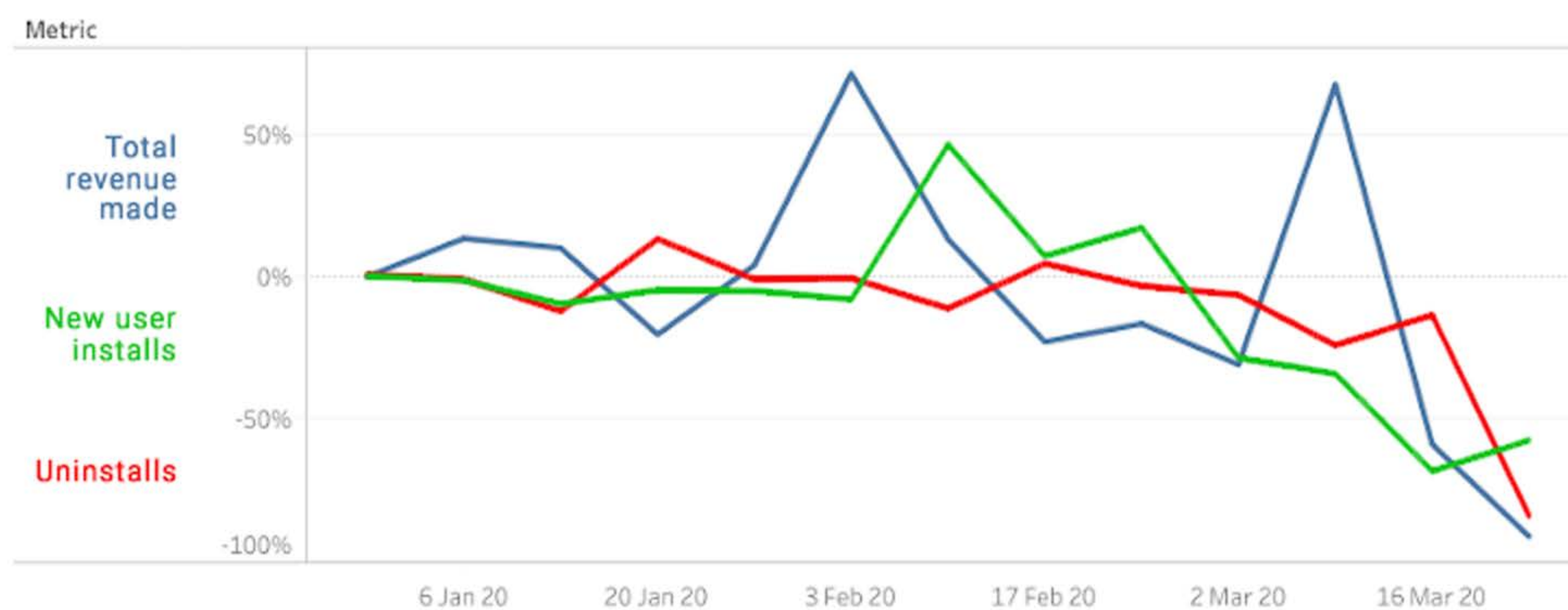
Metric Trends Weekly - Avg



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.

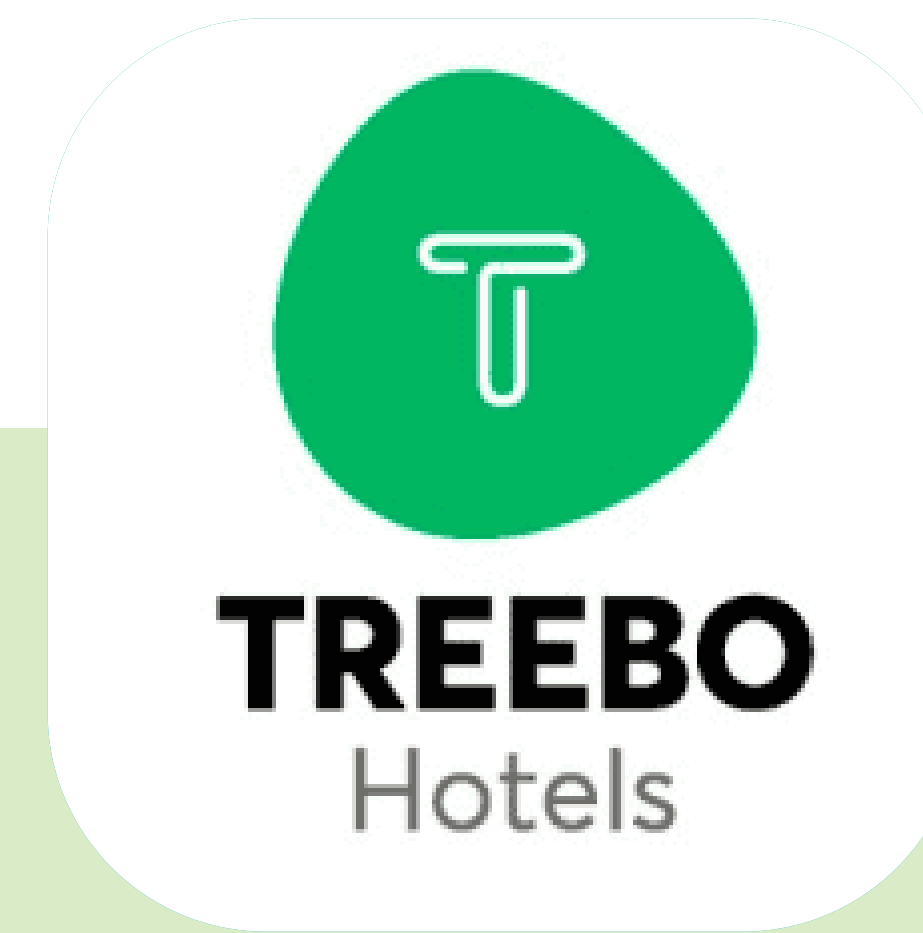
CUSTOMER STORIES



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.

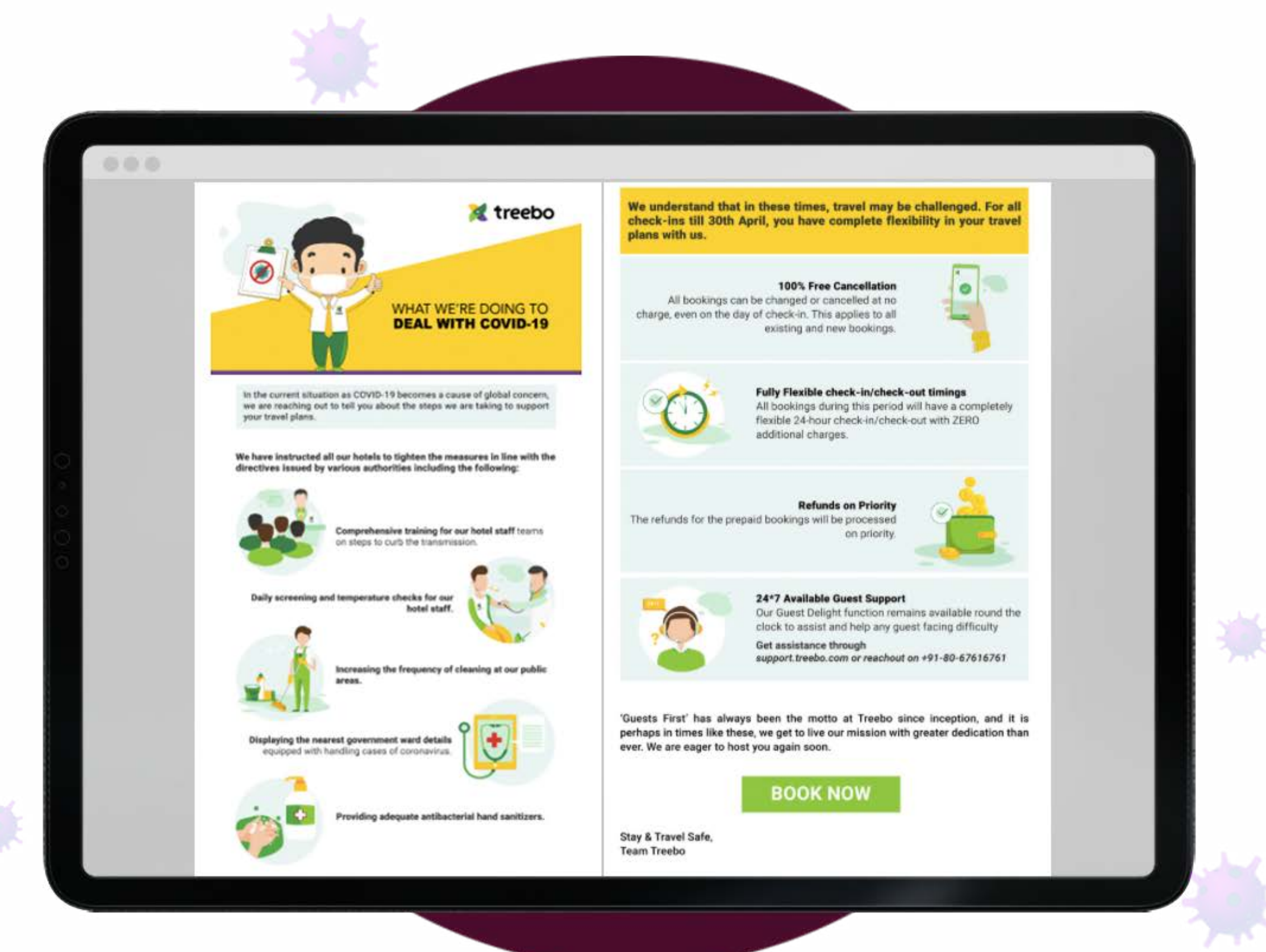
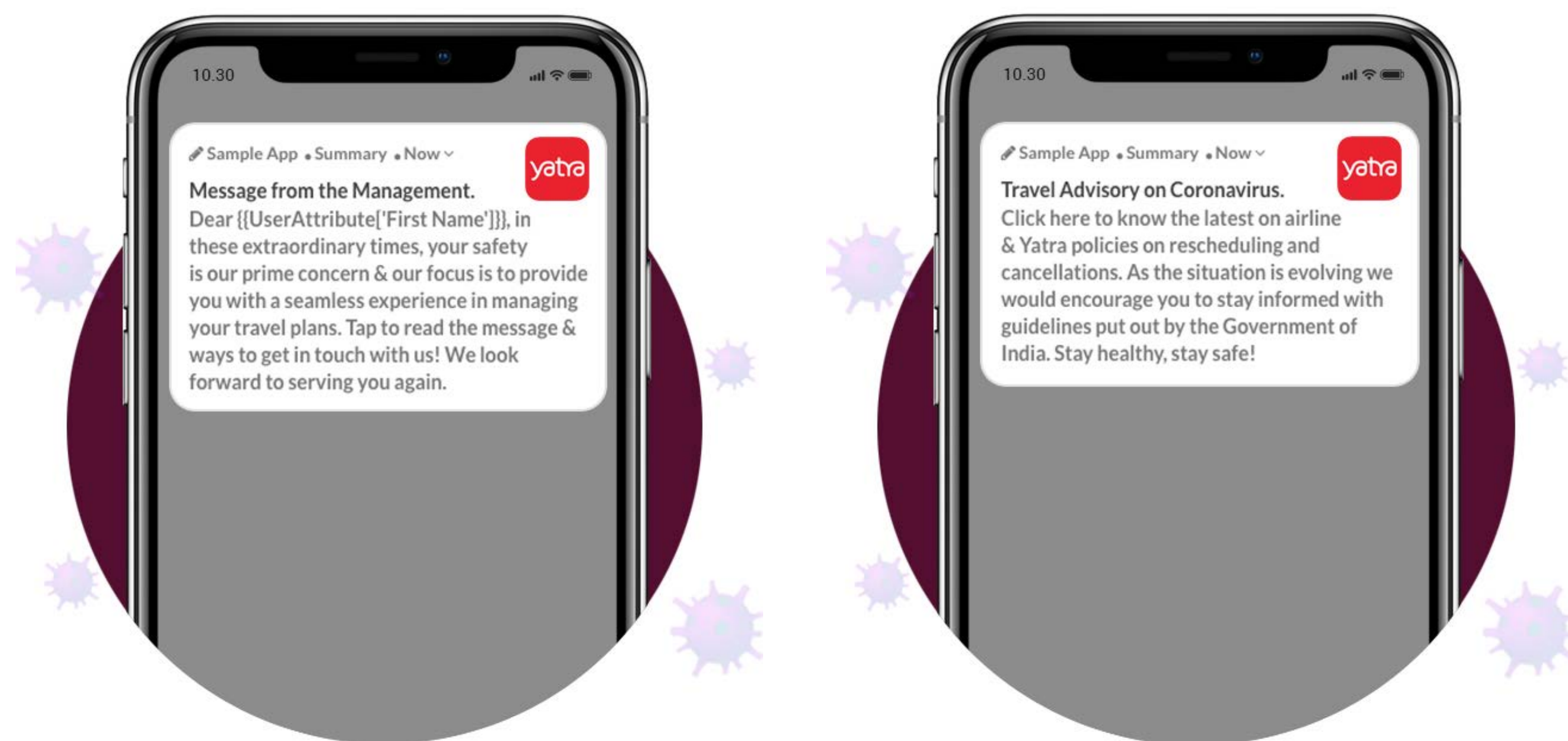
With these campaigns, Yatra reached out to more than 1.5 million users and was able to assist them in rescheduling or cancelling bookings without any hassle.



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.



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:

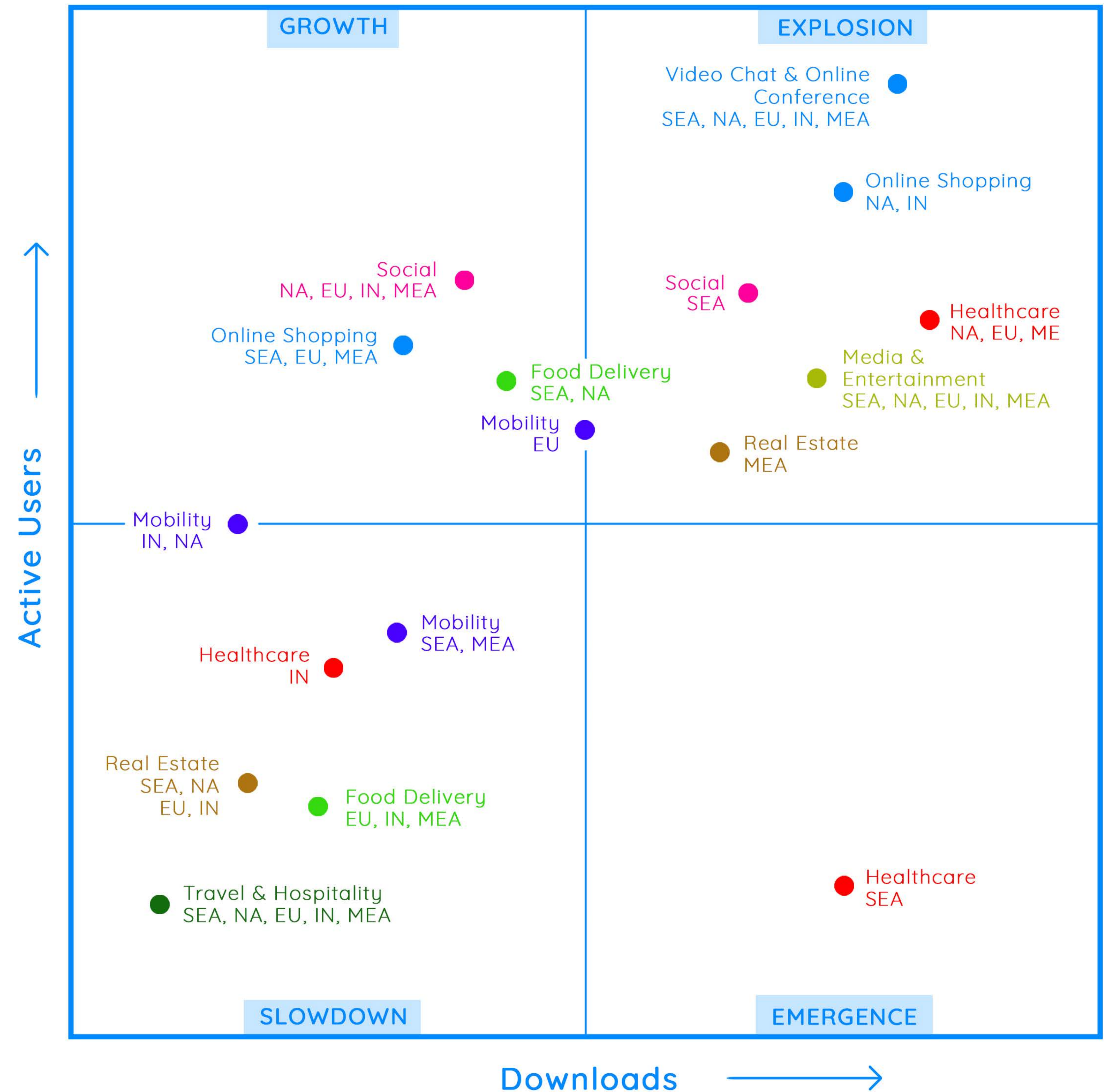
- Social Media (North America, Europe, India, & Middle-East)
- Online Shopping (Southeast Asia, Europe, Middle-East Asia)
- Food Delivery (Southeast Asia, North America)

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



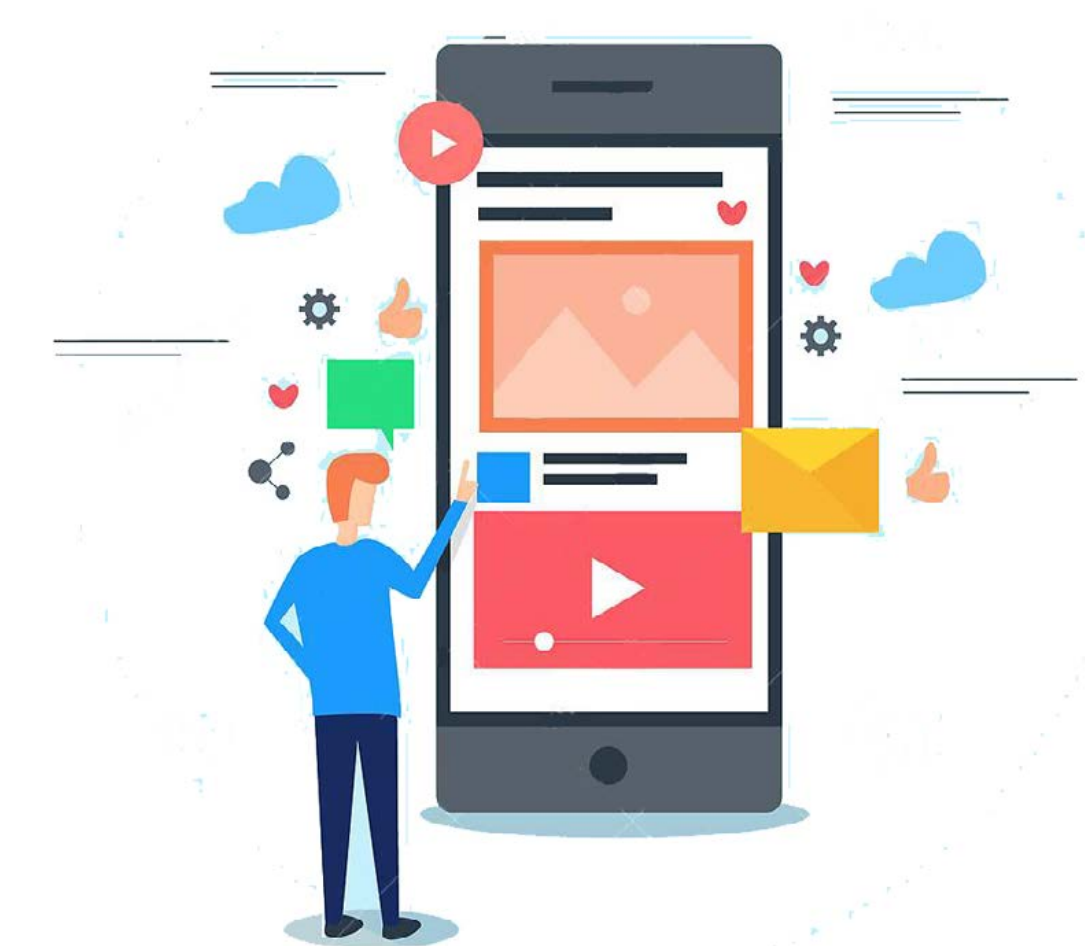
Educate users about the steps you're taking for them. Remember, consumers are anxious, and winning their trust during these times is vital. Use push notifications, emails, and text messages to send regular updates to your users.

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



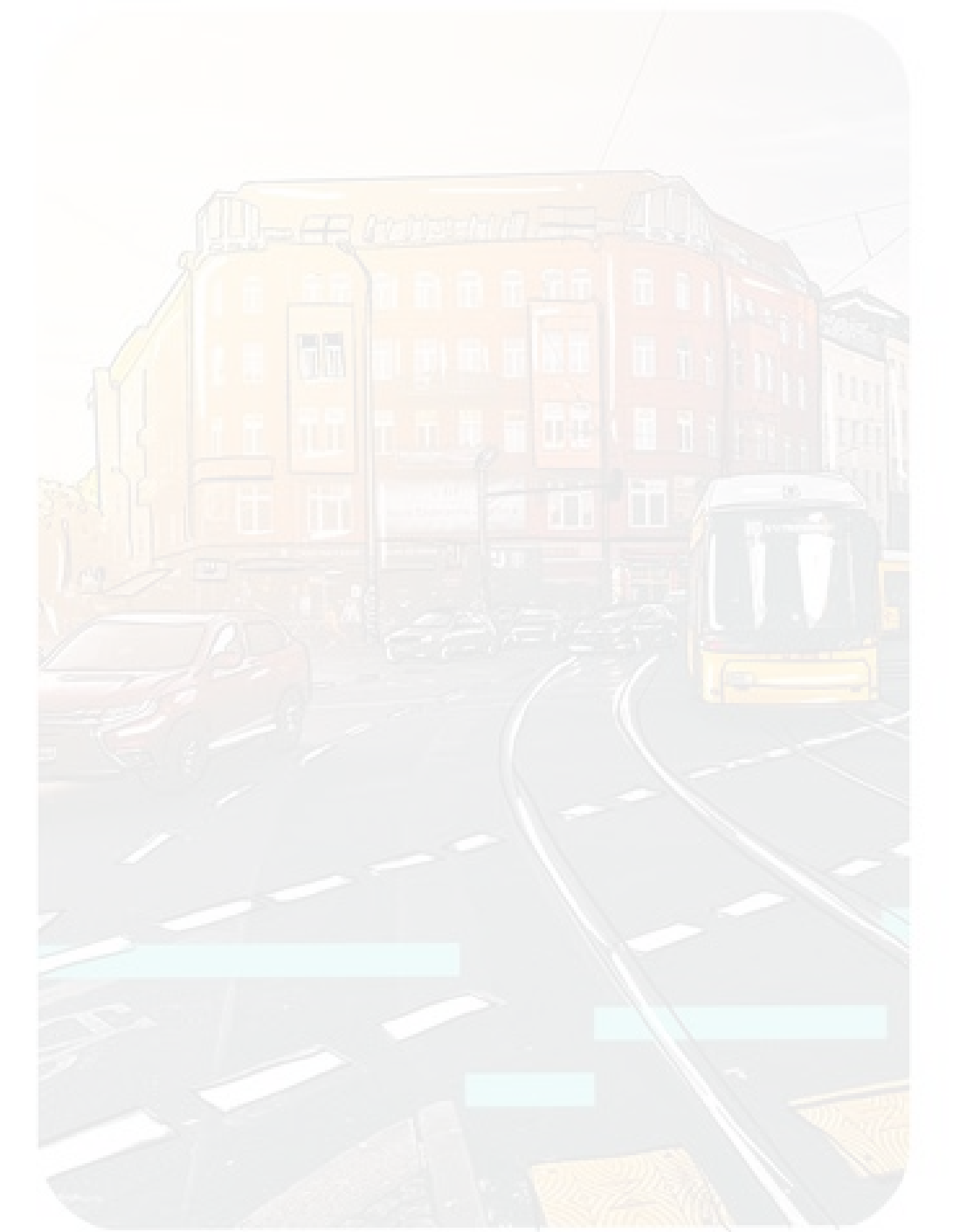
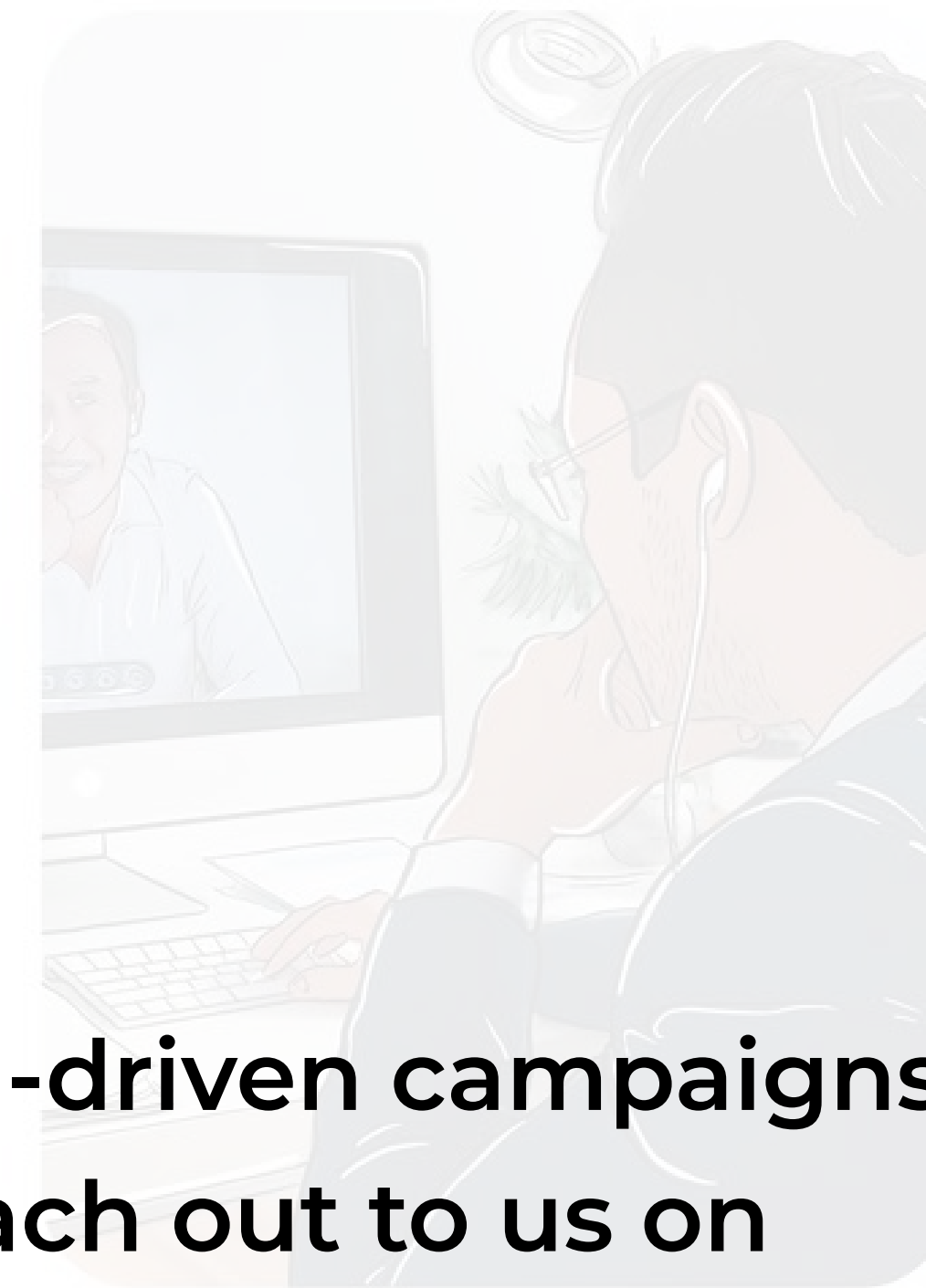
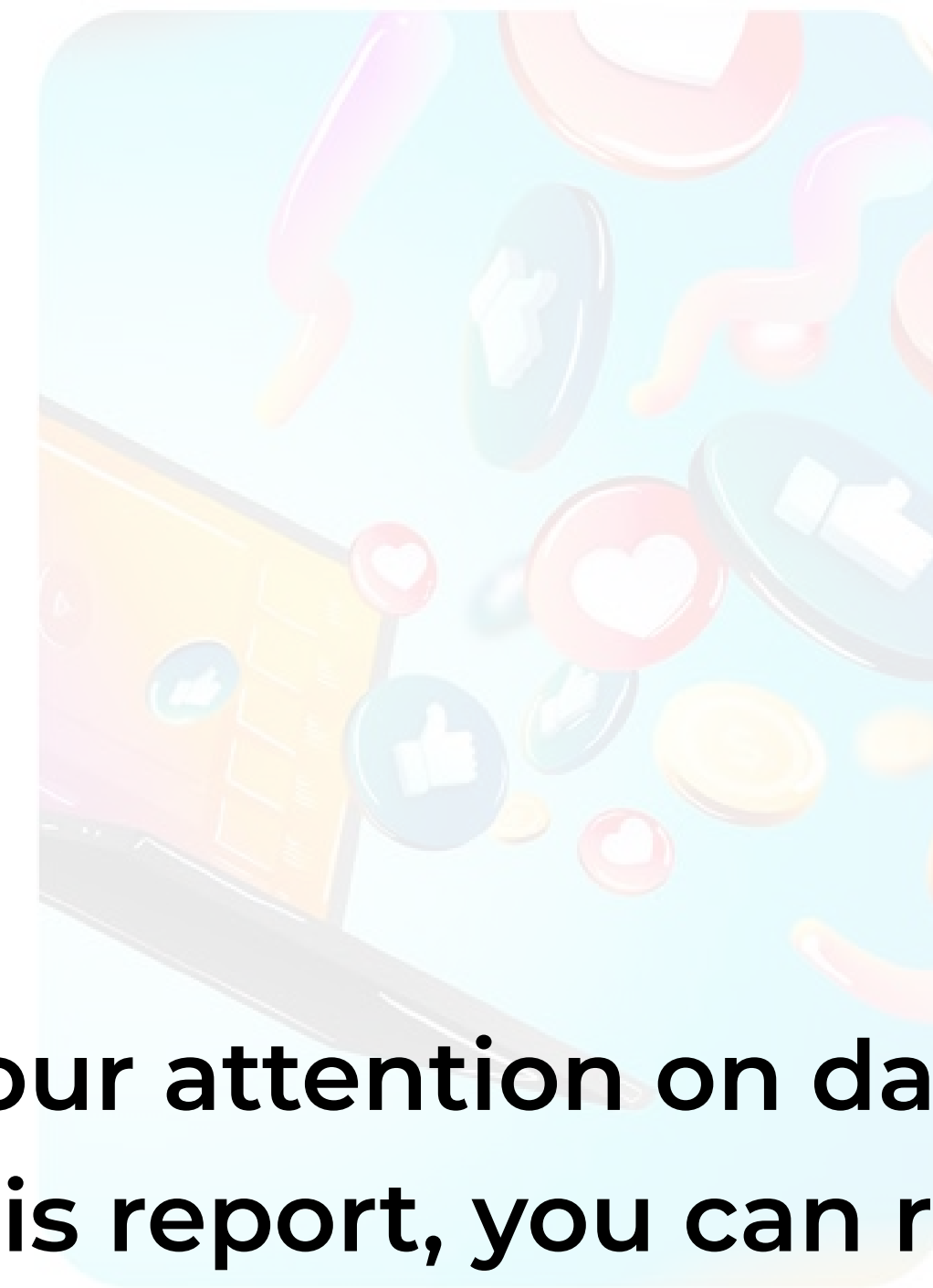
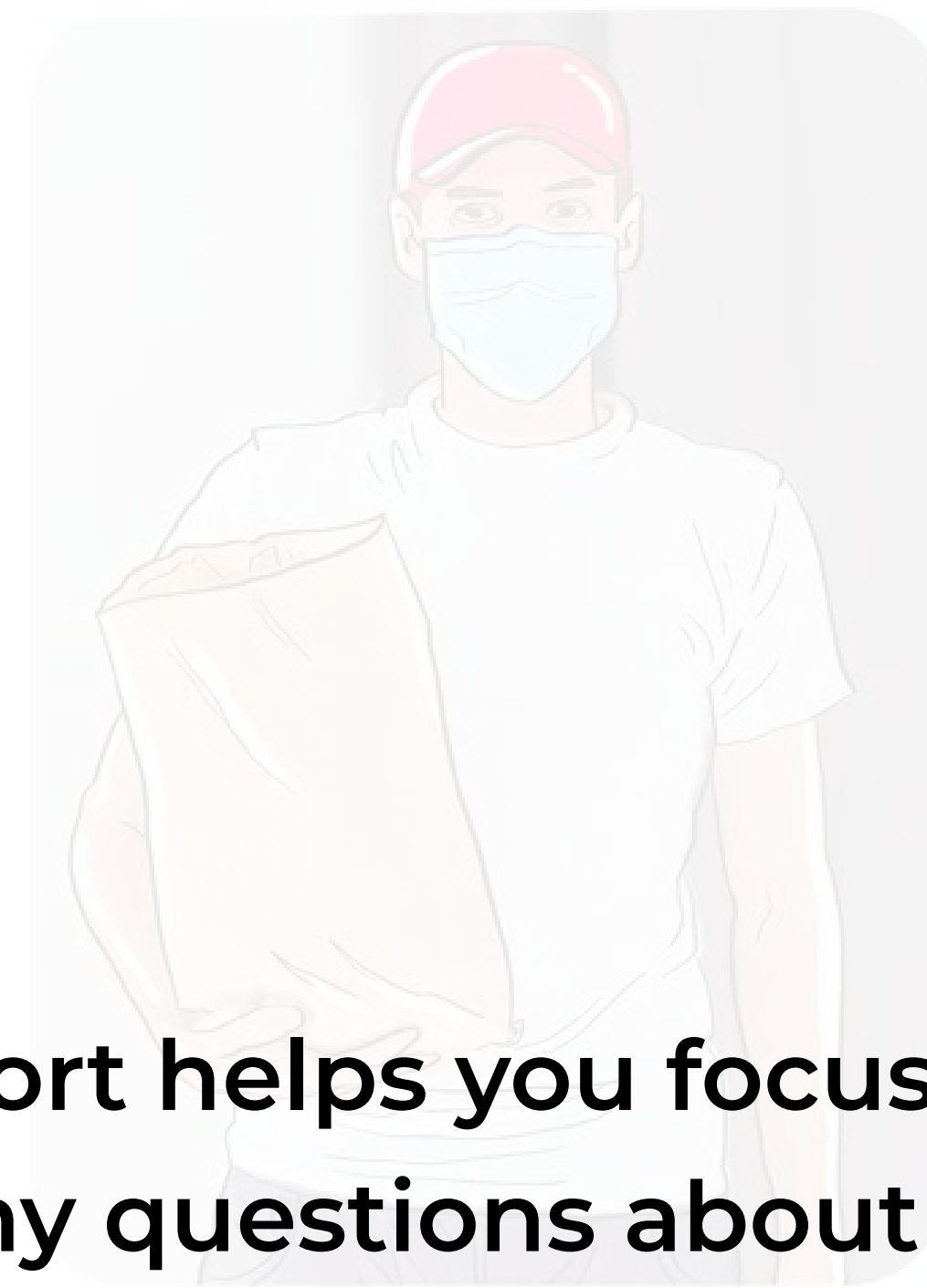
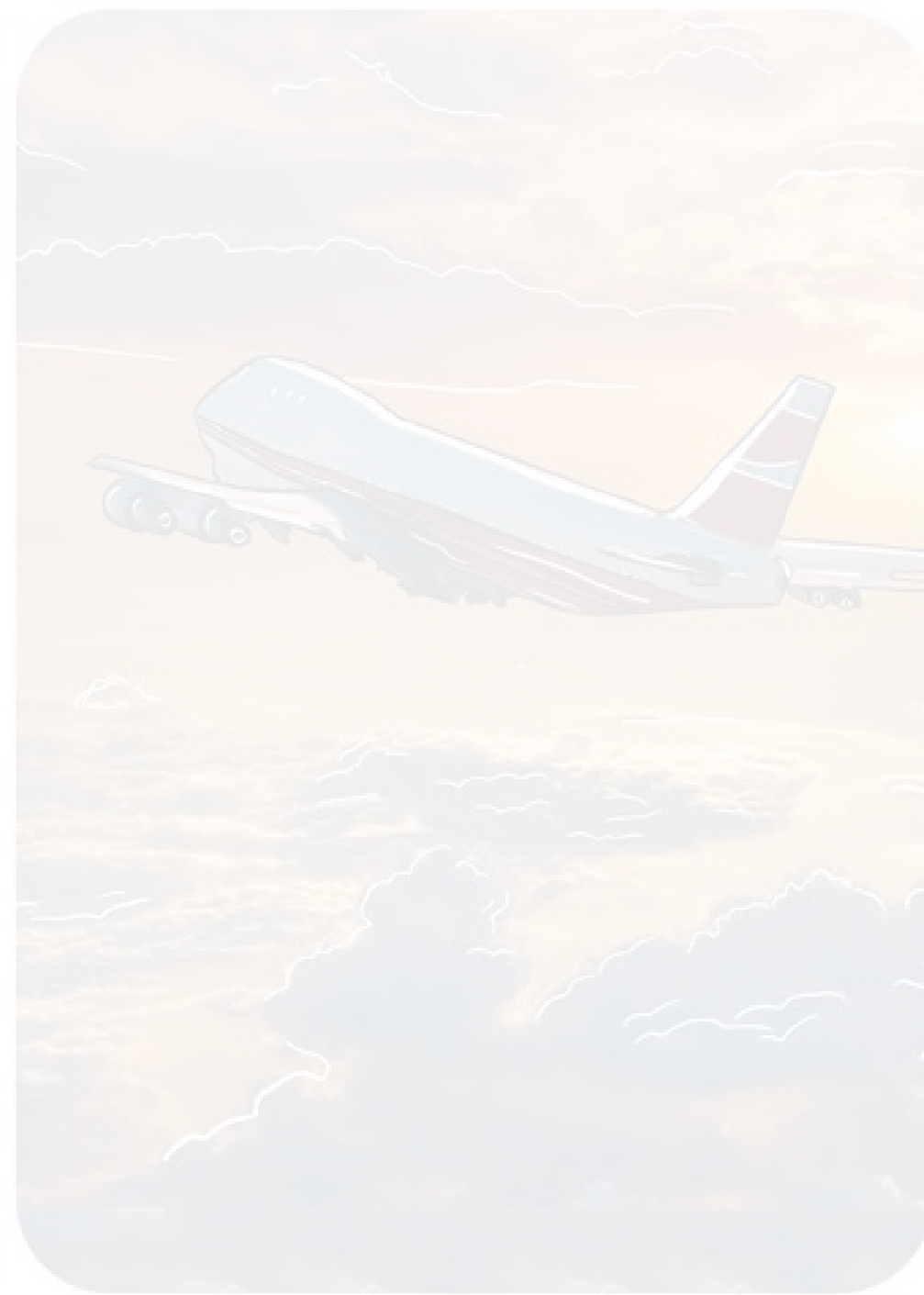
To increase active users, invest resources in curating bite-sized content that resonates with your users. Create videos, interactive carousels, quizzes, and image cards and host them on your app.

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

