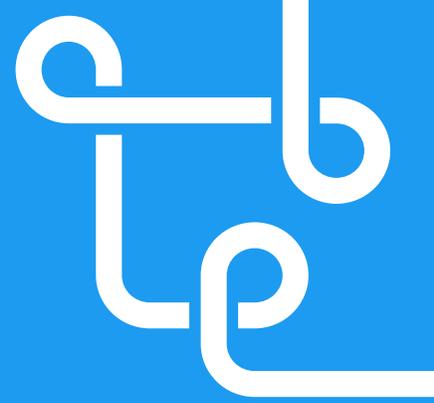


# Global app usage trends in the COVID-19 era:

May 27, 2020 update



The COVID-19 global pandemic continues to impact people and businesses around the globe. At MoPub, doing everything we can to make sure our teams and partners are safe remains our top priority. We recognize the needs of our partners and customers to continually have timely and actionable data; this report is the third in a series exploring the impact of COVID-19 on the app and advertiser ecosystem.

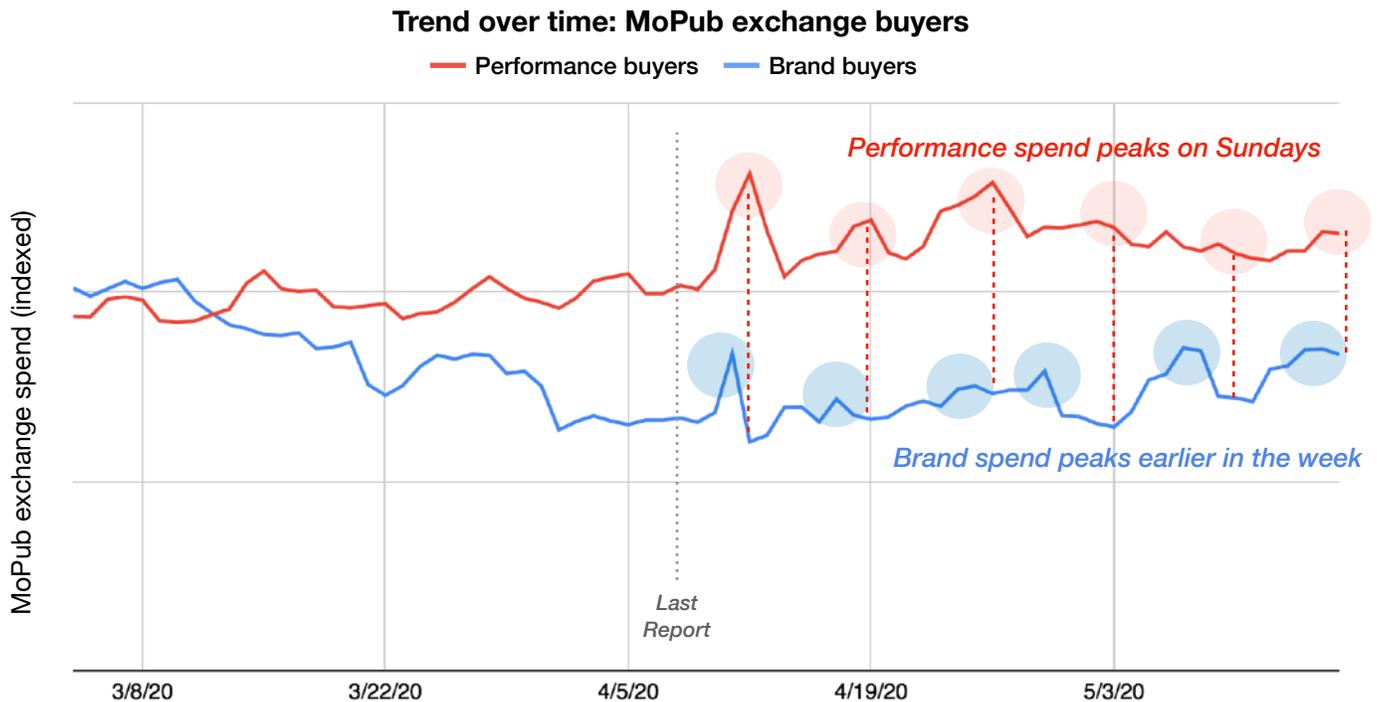
This edition features unique insights on the in-app economy from [Adjust](#). Our intent is to help marketers, demand partners, and app publishers make informed decisions in the midst of an environment in transition.

## Welcome to the “new normal”

One of the most striking data points from our [prior reports](#) demonstrated the uneven impact of COVID-19 across the buying community. Buyers on our exchange that focus on user acquisition had increased activity, whereas buyers with a greater proportion of branding advertisers demonstrated significant declines in spend from March into April.

Four weeks later, we see brand spend starting to rebound, while user acquisition remains strong:

- **Brand campaigns increased activity, with some clear spikes in spend as we enter May.**
- **Meanwhile, user acquisition campaigns continue to accelerate.**



## The “hyper-intentional” consumer

One interesting shift in buyer behaviour: as brand spend stabilized, the “spend spikes” shifted from weekends to Thursday and Friday. This is quite a bit different from the established pattern on MoPub’s exchange, which always showed clear spikes on weekends.

We believe one possible explanation for this may be that consumers are weighing retail commerce vs. the associated health risk of venturing out of the home. As such, many consumers are likely more deliberate in where they go and what they are buying. In response, advertisers may be making an equally intentional shift to create awareness and get into the consideration set during the consumer’s planning (during weekdays), vs. while they are in market (on weekends). It will be interesting to see if this trend continues.

### Takeaway:

After declines throughout March, we saw brand spend levels hit a low point on April 12 before starting to slowly climb back up. Based on this, we believe that brand spend has bottomed out for the time being and is now in a modest rebound, driven by key markets exiting the most restrictive phase of “stay-at-home” orders – plus brands re-entering the advertising space with products, messaging, and creative that align with the current consumer mindset.

We also believe that the user acquisition buyers will continue to invest heavily as long as in-app usage remains at a high level.

## Impact on shopping & e-commerce apps

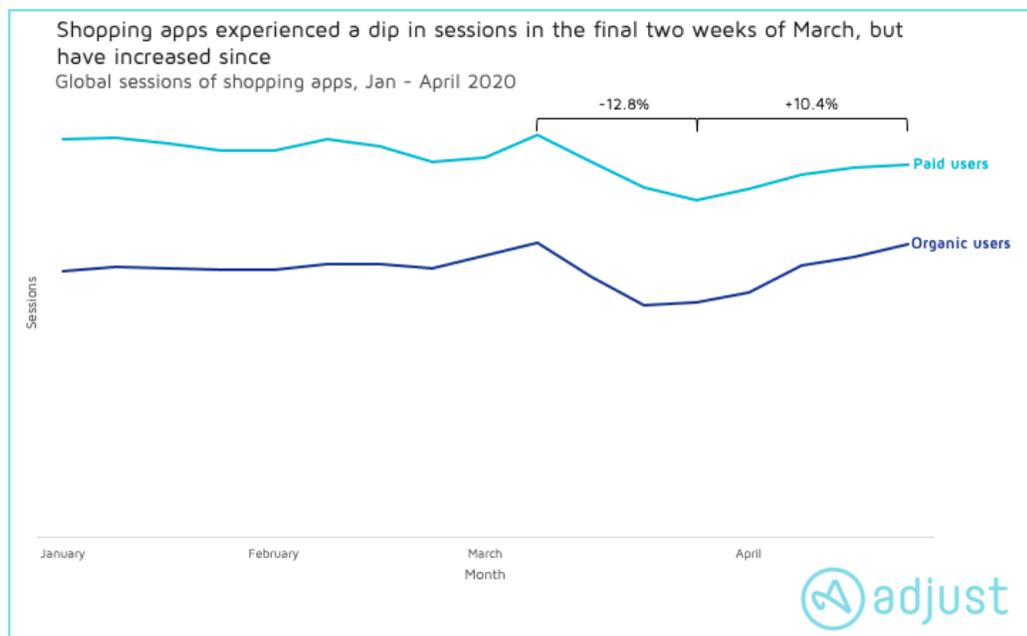
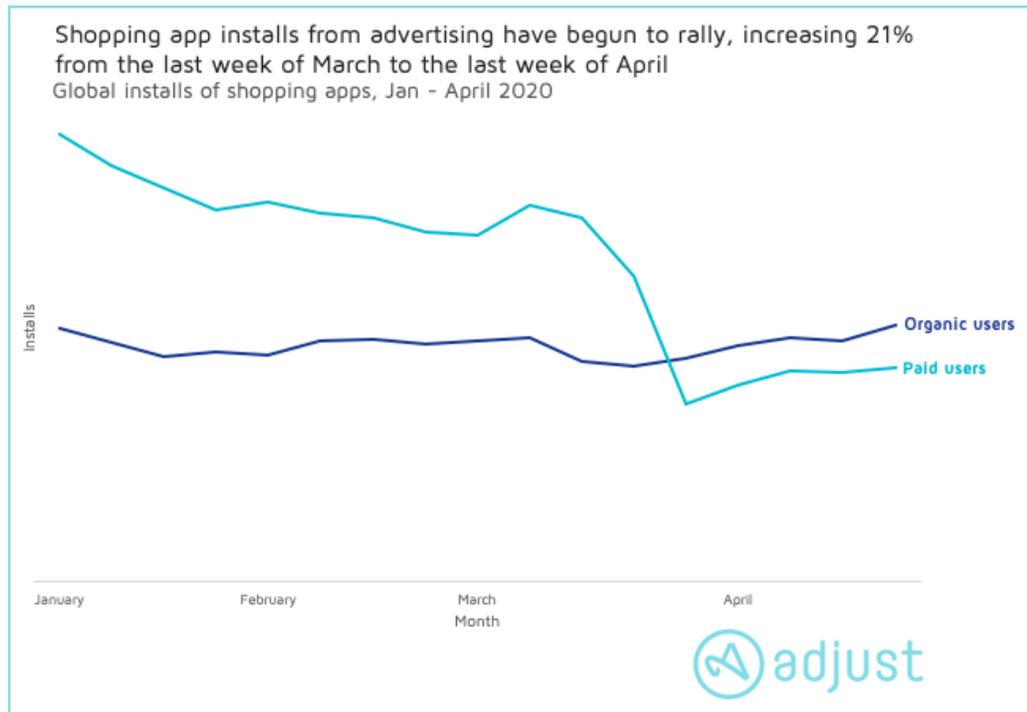
We worked with global app marketing platform [Adjust](#) to provide additional visibility into the impact of COVID-19 on acquisition, revenue events, and in-app purchases.

Similar to the brand dip-and-rebound shown on the prior page, Adjust found that shopping apps had a notable decline in installs and sessions early in the stay-at-home period, but have since shown signs of recovery.

Remarking on the data, Paul Müller, co-founder and CTO, Adjust, offered this assessment: **“The e-commerce industry got a bit shell-shocked in the first few weeks of the COVID-19 lockdown in March, with marketers dialing back ad spend. Yet we’ve seen the vertical rebound in April, as marketers and consumers alike are learning to live with the situation and return to more established consumption patterns. So there’s been a broader push toward re-engagement and re-targeting, in line with bringing customers back into the funnel.”**

The substantial drop in paid users is equally reflected in the user acquisition activity from shopping apps seen across MoPub’s exchange. We saw a significant decline in this vertical in late March, followed by reactivation on a per-market basis as businesses start to reopen.

The Adjust team highlighted this trend within their recently released [App Trends Report](#), which includes numerous insights across the mobile ecosystem through 2019 and Q1 2020.



## Impact on gaming, by genre

Throughout this reporting series, the evidence across our exchange and our mediation platform has clearly shown that buyers focused on user acquisition (UA) have been well positioned for the current market.

Adjust provided additional visibility into the impact of COVID-19 on revenue events and in-app purchases across gaming app verticals. All revenue event information below is from Adjust.

### Hyper-casual



Hyper-casual revenue events peaked in January and have declined slightly in the following months, with rallies at certain points in March. Notably, markets such as Germany, Spain, and France all experienced increases in late March, as stay-at-home orders took effect.

Note that it is more difficult to define revenue events for this category; the primary revenue driver in hyper-casual is in-app advertising.

### Casual



Over time Adjust recorded an increase in revenue events in this category. **Adjust saw a 46% increase in revenue events from late January to late April.**

Casual gaming is also the largest advertiser category running user acquisition campaigns across MoPub. We believe this genre achieved a new “growth engine” in which UA activity yields new paying users, which funds additional UA, which further expands the paying audience.

### Mid-Core



Interestingly, mid-core titles experienced a boost in revenue activities coming out of isolation, not during it, **with Adjust reporting a 42% increase from mid-April to mid-May.**

We theorize that this could represent progression through the gaming genre: users move from simple to more complex forms of entertainment. (Please note this is only a theory; MoPub does not track user behavior in a way that would prove this concept.)

### Takeaway

Unsurprisingly, the general trend for gaming aligns with the documented increase in user acquisition spend; overall this vertical is expanding as people spend more time at home.

Adjust’s insights demonstrate that the in-app economies of different gaming genres have shifted in response to increased mobile usage, but the general trend in gaming is positive.

## Time spent in gaming apps climbs

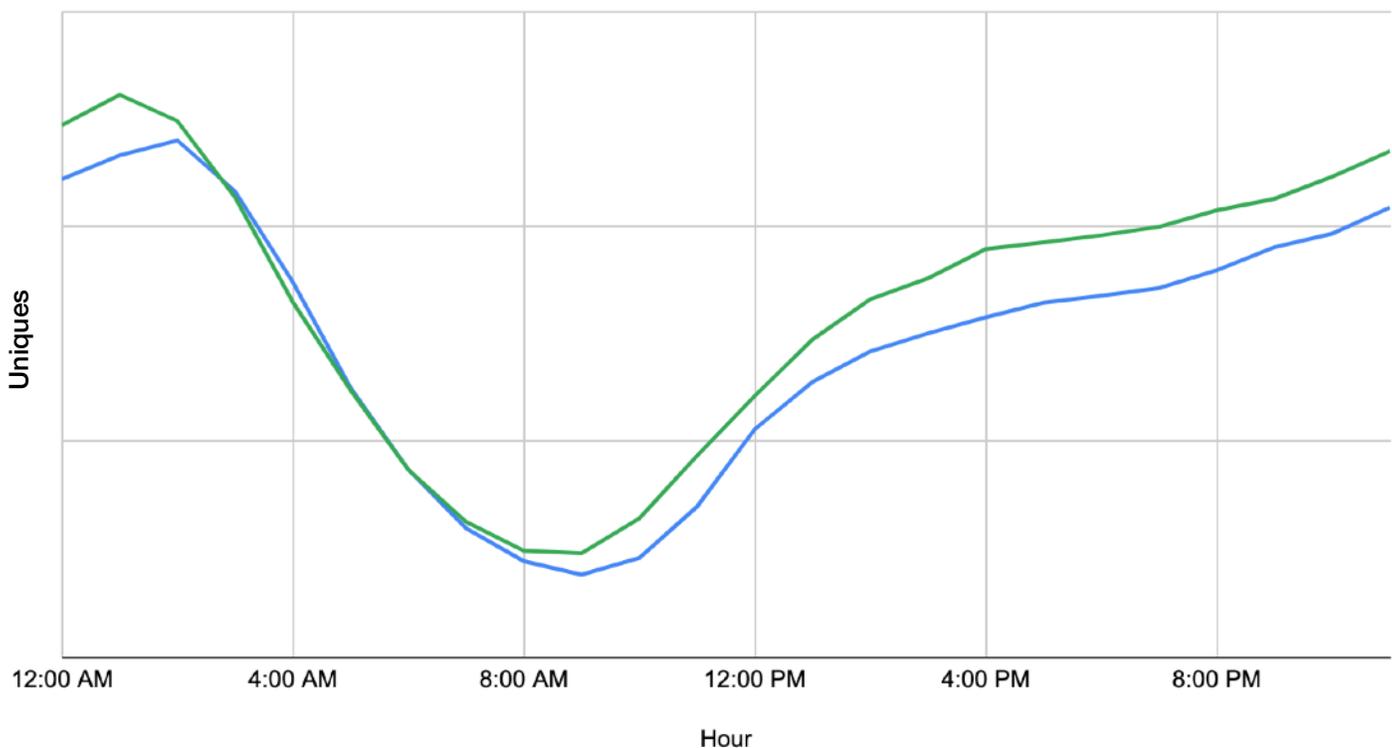
Gaming has always been one of the key verticals in the app world. [eMarketer](#) has stated that gaming, along with social networking, audio, video, and messaging represent the five activities that account for the most time spent in-app.

In prior reports, we showed a clear link between stay-at-home restrictions and increased app usage. As people spend more time at home, they turn to mobile apps to stay informed, stay connected, and stay entertained.

We looked deeper at the gaming vertical in the United States to see another expression of this trend. The number of uniques reached through the gaming vertical increased across every hour during the reporting period. This may have come as a surprise to some buyers, who believed this usage was driven by commuting and anticipated a decline in gaming in parallel with a decline in commuters; the data shows this isn't the case.

### Change in gaming uniques by hour, North America

— March 1-7 — May 1-7



#### Takeaway:

Mobile gaming is certainly not dependent on commuters; it remains a vibrant activity channel that has actually increased in usage as people spend more time at home.

# What's next?

## For media buyers

As media buyers evaluate restarting campaigns, we recommend considering reallocation to apps that people are tuning into for information, connection, and entertainment. Our expanded curated inventory offering provides DealIDs to facilitate contextual targeting. [Contact our Demand Team](#) for information and activation.

## For publishers

For the immediate future, we also recommend prioritizing the ad formats and buying partners that skew toward user acquisition. That said, as brand marketers re-emerge make sure those buyers have equal access to your inventory. Our Publisher Services team is available to assist with activation and optimization strategies.

## For everyone

We expect recovery will be a lengthy process with ups and downs — during this time our top priority remains the safety and well-being of all of our partners, clients, and all Twitter employees. If you're looking for additional resources for your business at this time, Twitter has recommendations for [brand communications during times of crisis](#). You can also stay up to date with information about COVID-19 from credible, authoritative news sources and public health agencies by following [Twitter's live curated coverage](#).

