

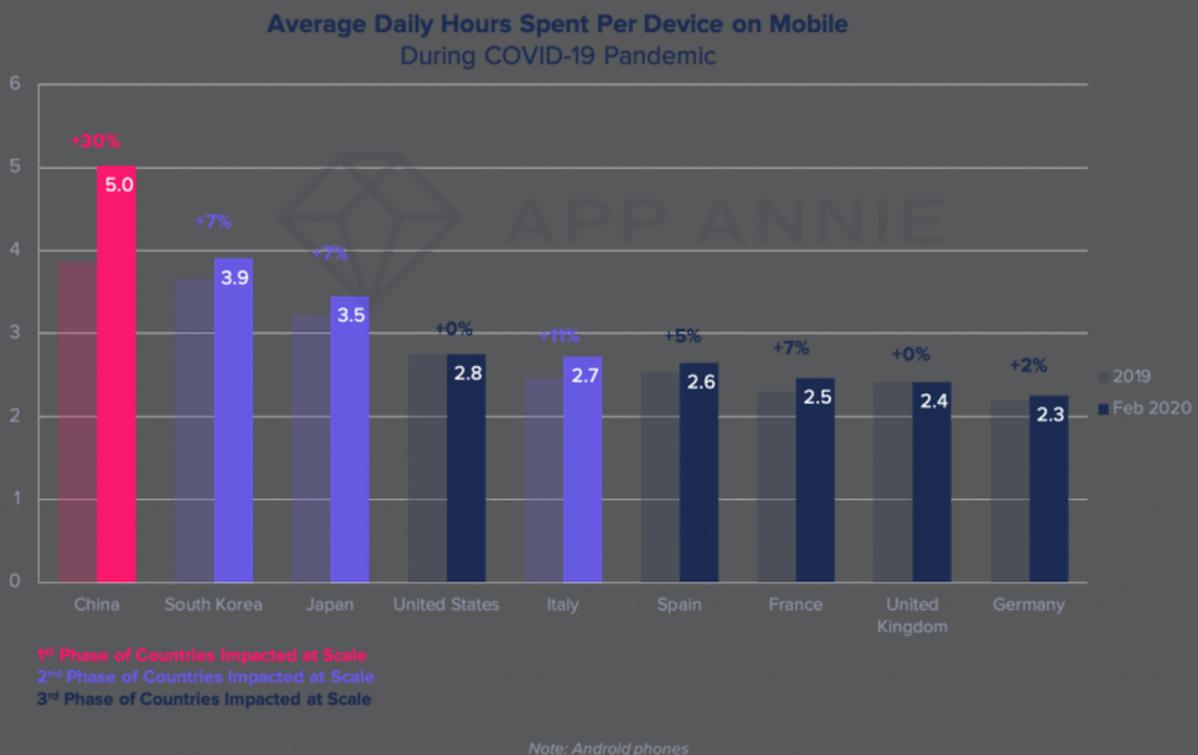
Covid19 Effects on Mobile and Digital Media

Whilst in the throes of the coronavirus (COVID-19) pandemic, we can start to analyse the significant impact of mobile usage on our lives impacted by working from home, the alteration of our lifestyles and the demands placed on us by government measures and restrictions.

The MMA along with some of our members has pulled this report together to understand and highlight how the corona virus has changed our lifestyle across Work, Education, Gaming, Socialising, Entertainment, Health, News, Information and purchasing practices, especially Food.



Mobile Time in Italy and China Increased Significantly During Outbreak



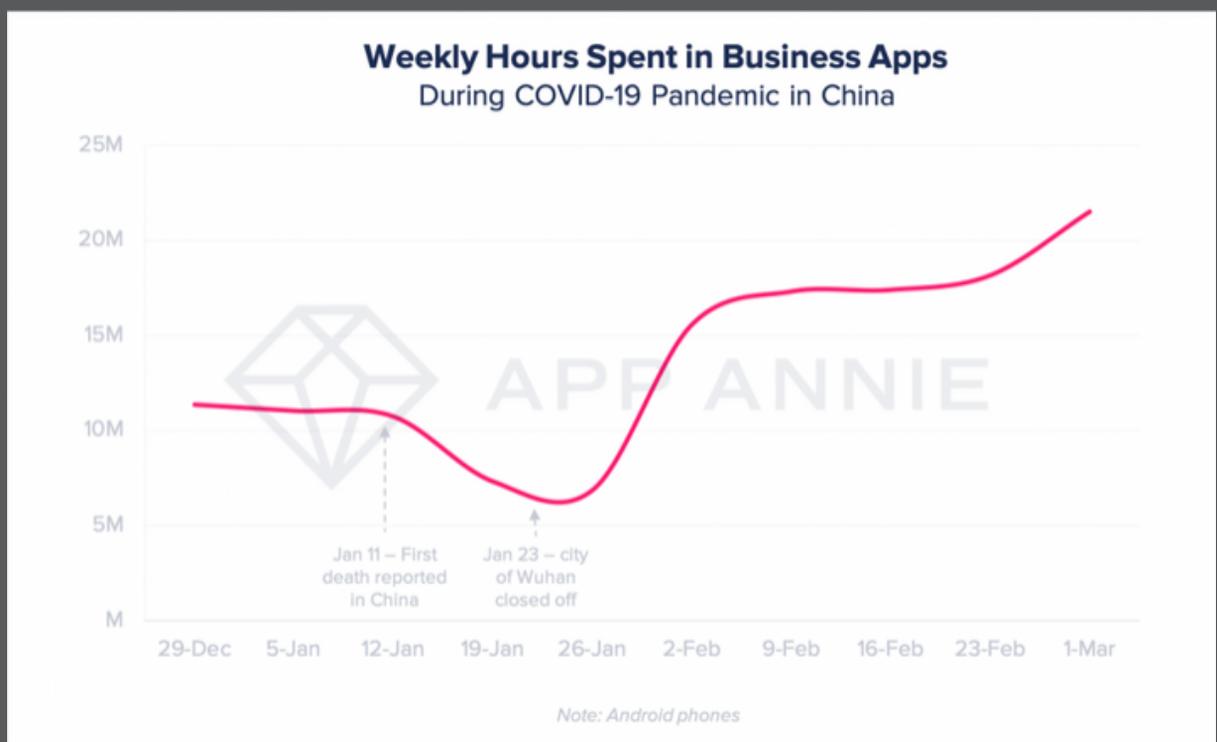
The effects of the corona virus appeared in stages. With the emergence of the latest pandemic wave, businesses and governments began to take more serious and direct measures. Examples include temporary closure of businesses such as cafes, restaurants, malls, shops, gyms and sports centres, curfews and measures to eliminate crowded environments (down to 2 in some countries).

Mobile activity can be seen across various countries below. The first wave that started in China, then Italy, Japan, and South Korea, followed by France, Germany, the USA and the UK. When people were staying at home, they interacted more with their mobile devices to keep up with the news, fill the gaps in their routine life or have fun and socialise. For example; starting in China in January, with the curfew and quarantine practices, the time spent on mobile daily reached rose to 5 hours from 4.

¹ <https://www.appannie.com/en/insights/market-data/coronavirus-impact-mobile-economy/>

Business and Education Practices on the Rise

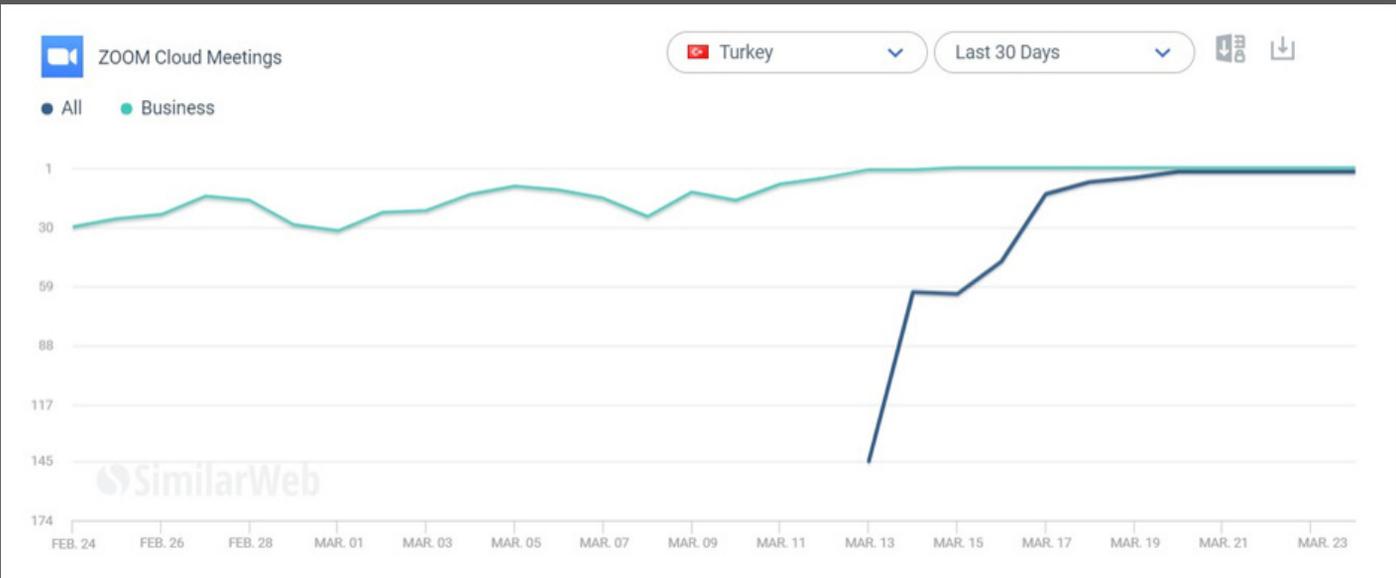
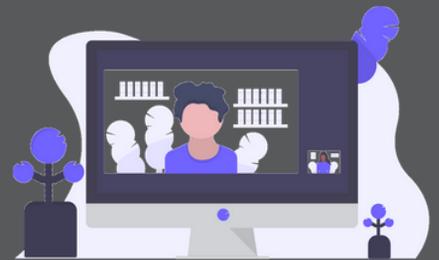
The first major noticeable increase was visible in China in terms of mobile activity was the growth in applications used for business. The implementation of the social distancing rule, closing offices and switching to working from home has led to huge increases in the download and use of these applications.



Business and education practices in China in the first half of February 2020 almost doubled compared to the weekly average of downloads in 2019. The most popular during this period were Huawei Cloud WeLink, DingTalk and ZOOM Cloud Meetings applications.²

² <https://www.appannie.com/en/insights/market-data/coronavirus-impact-mobile-economy/>

A similar trend emerged in Italy. After serious developments such as the quarantine of the country, in the first week of March; There were 761,000 downloads in business applications from Google Play and iOS platforms. This figure is a 135% increase compared to the weekly average figures 1 year ago.



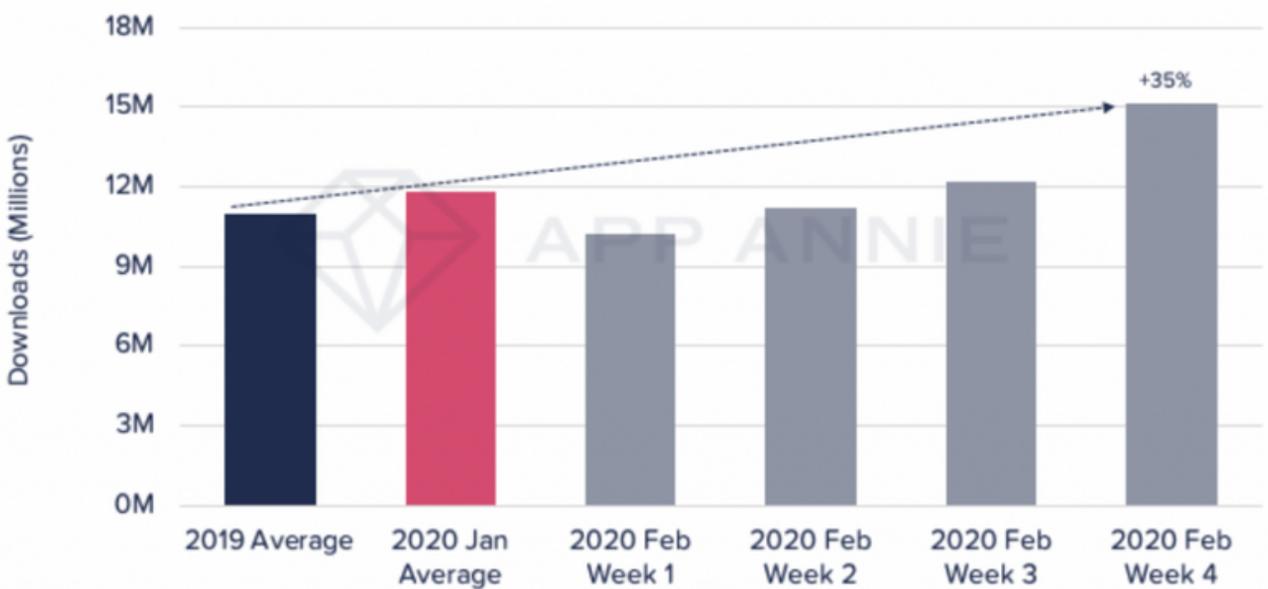
As of March 16, 2020, ZOOM Cloud Meetings application, which we all use frequently for virtual meetings, has been ranked 1st in general iPhone application downloads in 35 markets (including all games and applications). ³

³ Similar Web Zoom Meeting Clouds App Rankings

Users Prefer Mobile Games

With the increasing quarantine and out-of-home policies, users seem to be playing mobile games for fun. Similar to the trend in business practices in China, gaming has seen the same increase. Also, in February 2020, the weekly game download rate increased by 80% compared to the weekly download rate of the previous year.⁴

Average Weekly Downloads in Games
iOS and Google Play, South Korea



The South Korean market is also in the category of countries that were first affected by the virus. Average game downloads for the week of February 23, 2020 have increased by 35% over the 2019 weekly game download average, exceeding 15 million downloads.⁵

⁴⁻⁵ <https://www.appannie.com/en/insights/market-data/coronavirus-impact-mobile-economy/>

Users Prefer Mobile Games

It is obvious that the curfews and the spread of social isolation policies will increase the game consumption rates in a similar way in other countries. Below you can see the list of the 10 most downloaded games by country



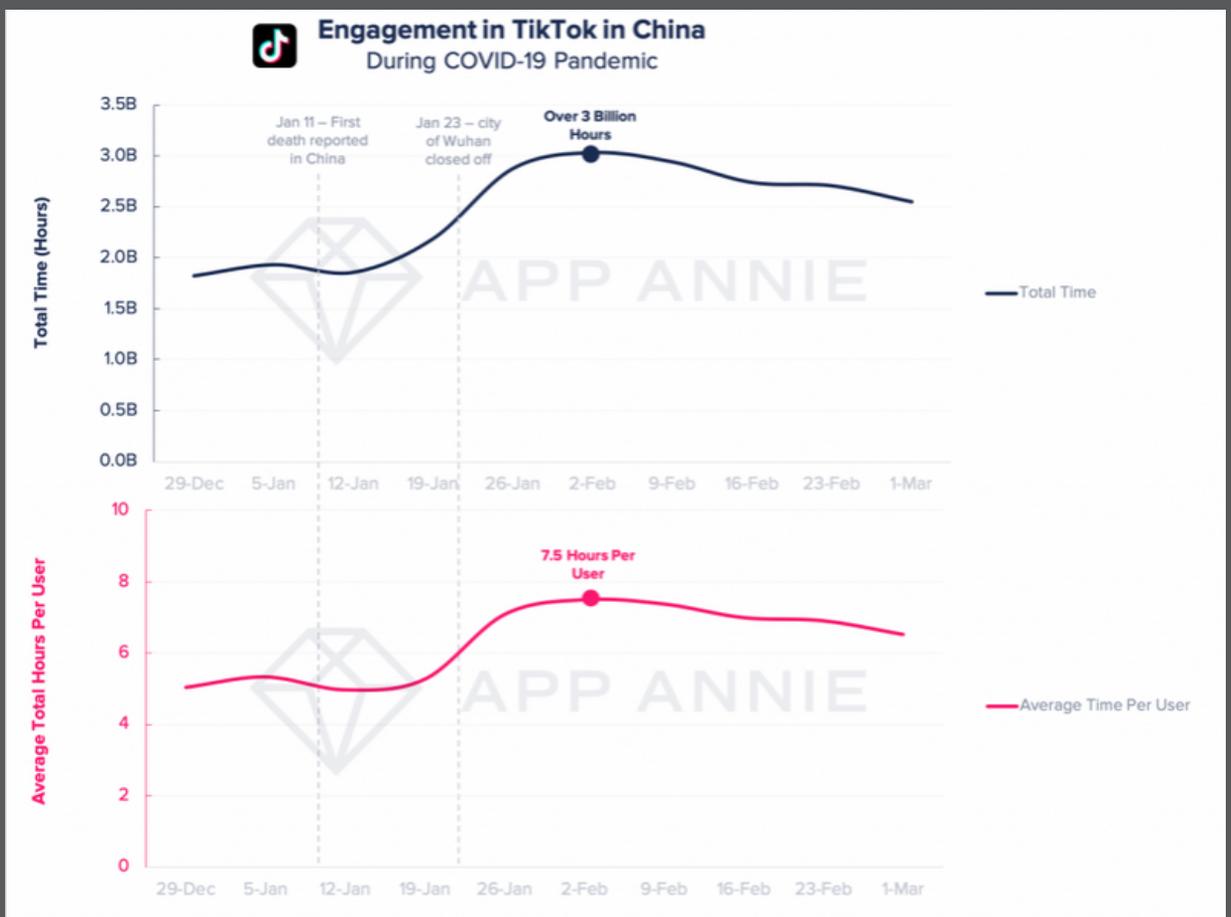
Top Games by iOS & Google Play Downloads
During COVID-19 Outbreak, March 1-14, 2020

Rank	China	France	Germany	Italy	Japan	South Korea	United Kingdom	United States
1	爱上消消消	Slap Kings	Slap Kings	Slap Kings	Combat of Hero	Park Master	Slap Kings	Slap Kings
2	Game for Peace	Brain Out	Woodturning	Draw Climber	この素晴らしい世界に祝福を!	AFK Arena	Brain Test: Tricky Puzzles	Brain Test: Tricky Puzzles
3	Honour of Kings	The Seven Deadly Sins: Hikari to Yami no Grand Cross	Draw Climber	Woodturning	Draw Climber	Draw Climber	Chores! - Spring Into Cleaning	Sort It 3D
4	风云岛行动	Trivia.io	Will It Shred?	Brain Out	Push'em all	R5	Woodturning	Draw Climber
5	Mini World Block Art	Scrabble GO	Brain Out	Slap That	Brain Test: Tricky Puzzles	Push'em all	Trivia.io	Dentist Bling
6	Brain Out	Slap That	Cut and Paint	Brain Test: Tricky Puzzles	Park Master	Slap Kings	Draw Climber	Cut and Paint
7	Special Agent Up	Draw Climber	Fishdom: Deep Dive	Square Bird	Toon Blast	A3: 스틸얼라이브	Slap That	Trivia.io
8	Minecraft Pocket Edition	Woodturning	Brain Test: Tricky Puzzles	Fishdom: Deep Dive	Pull the Pin	Random Dice	Lucky Looter	The Seven Deadly Sins: Hikari to Yami no Grand Cross
9	Rescue Cut	Cut and Paint	The Seven Deadly Sins: Hikari to Yami no Grand Cross	Dentist Bling	Rescue Cut	PUBG MOBILE	OverTake	Woodturning
10	Plant vs. Zombies 2	Will It Shred?	Dentist Bling	Parking Jam 3D	Mario Kart Tour	Brain Out	Sort It 3D	Slap That

Note: China is iOS only

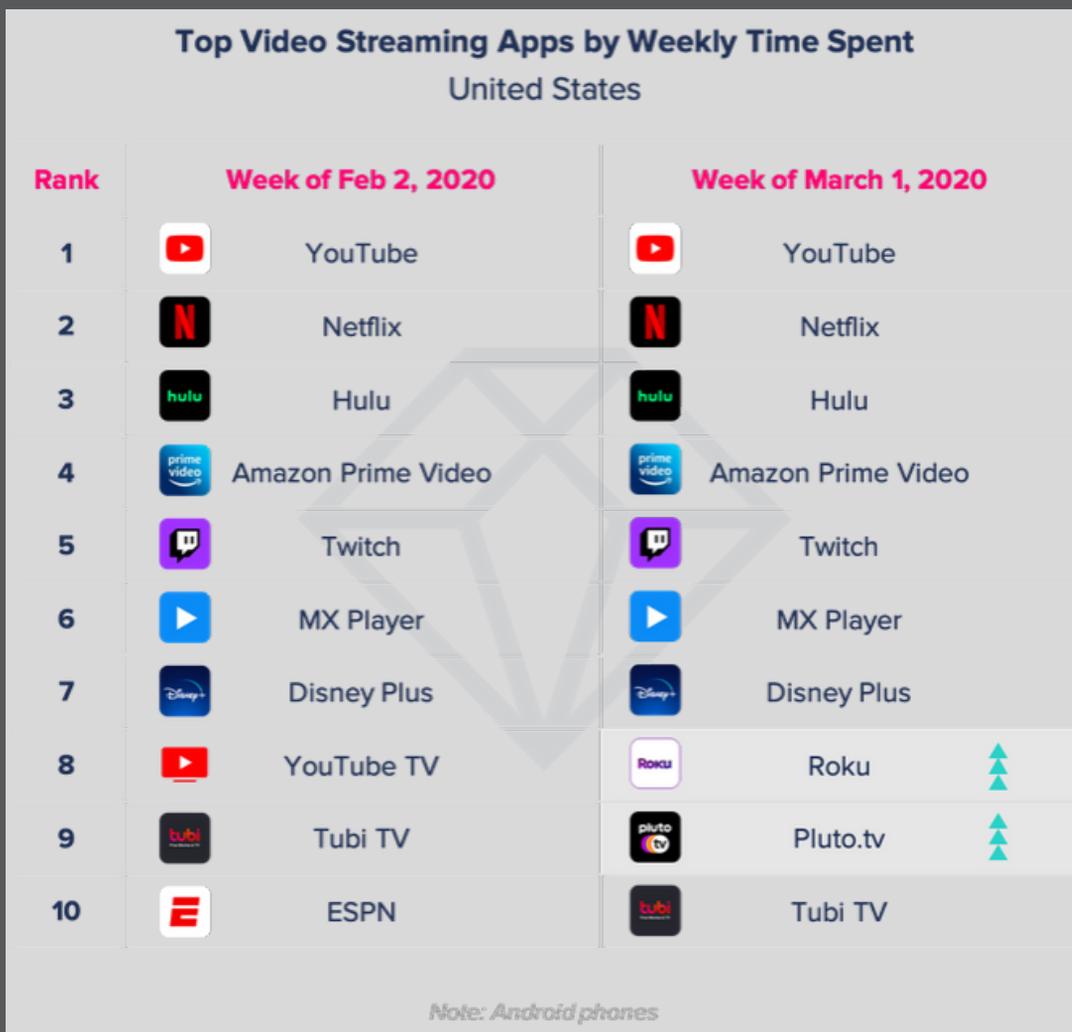
Interaction and Time Passing Increases in Social Media and Video Surveillance Applications

In addition to game applications, users spend a lot of time in this process, using social media and sharing video applications. During the first pandemic developments in China, the average time spent per user in the TikTok application, as well as the increase in the total time spent by Android users in the application, is remarkable⁶



⁶ <https://www.appannie.com/en/insights/market-data/coronavirus-impact-mobile-economy/>

On the other hand, when we look at video sharing applications; In the top 10 streaming video apps for Android phones in the U.S., users consumed 405 million hours of video content during the week of March 1-7. As can be seen in the graphic below, Roku and Pluto.tv applications are among the top 10 applications.⁷



These trends are an important indication that US citizens have remained at home due to recent events and spent time consuming video content from their mobile devices. The increase in the usage of Pluto.tv application is free, and it is preferred because it does not require subscription. In addition, in this period, entertainment companies started to transmit films that will enter the movie theatres in order to keep up with the trends on online platforms. An example of this is the Disney's Frozen II movie.⁸

7-8 <https://www.appannie.com/en/insights/market-data/coronavirus-impact-mobile-economy/>

When we turned our focus lens to Italy, the rate of watching TV increased by 14.2% for children and 14.2% for young people aged 15-24. Analysing this further, there was a 150% increase in traffic on news sites.⁹



	All	U.S.	UK	Gen Z	Millennials	Gen X	Boomers
Reading more online news	38%	39%	31%	39%	47%	37%	16%
Watching more TV	36%	39%	25%	32%	42%	39%	23%
Cleaning my home more often	34%	36%	25%	35%	39%	35%	18%
Spending more quality time with my family	30%	33%	17%	26%	40%	29%	12%
Communicating with my friends / family more often	29%	32%	15%	27%	35%	30%	15%
Using social media more often	27%	29%	16%	32%	37%	23%	6%
Listening to more music	26%	28%	15%	35%	30%	23%	12%
Watching more online TV	24%	26%	14%	21%	34%	22%	10%
Buying more items online	20%	22%	13%	12%	26%	24%	3%
Cooking more	20%	22%	11%	18%	29%	16%	14%
Exercising more	17%	19%	7%	20%	22%	16%	5%
Reading more books	16%	17%	12%	20%	19%	14%	11%
Gaming more often	14%	15%	11%	21%	21%	8%	8%
Reading more print news	12%	13%	9%	8%	20%	11%	4%
Dedicating more time to learning	12%	13%	8%	20%	15%	9%	5%
Ordering more takeaways	11%	12%	5%	7%	20%	8%	1%
Working more often (longer than my expected hours)	8%	9%	5%	7%	12%	6%	4%
Other	6%	7%	3%	5%	6%	10%	3%
My behavior at home hasn't changed significantly	33%	30%	48%	28%	21%	36%	63%

Question: In light of the coronavirus outbreak, are you doing any of the following activities more often than before while at home?

In the report shared by GlobalWebIndex about coronavirus (COVID-19), they asked about the activities that US and UK citizens do more than usual during this pandemic, in summary 38% of users read more online news and 36% watch more TV.¹⁰

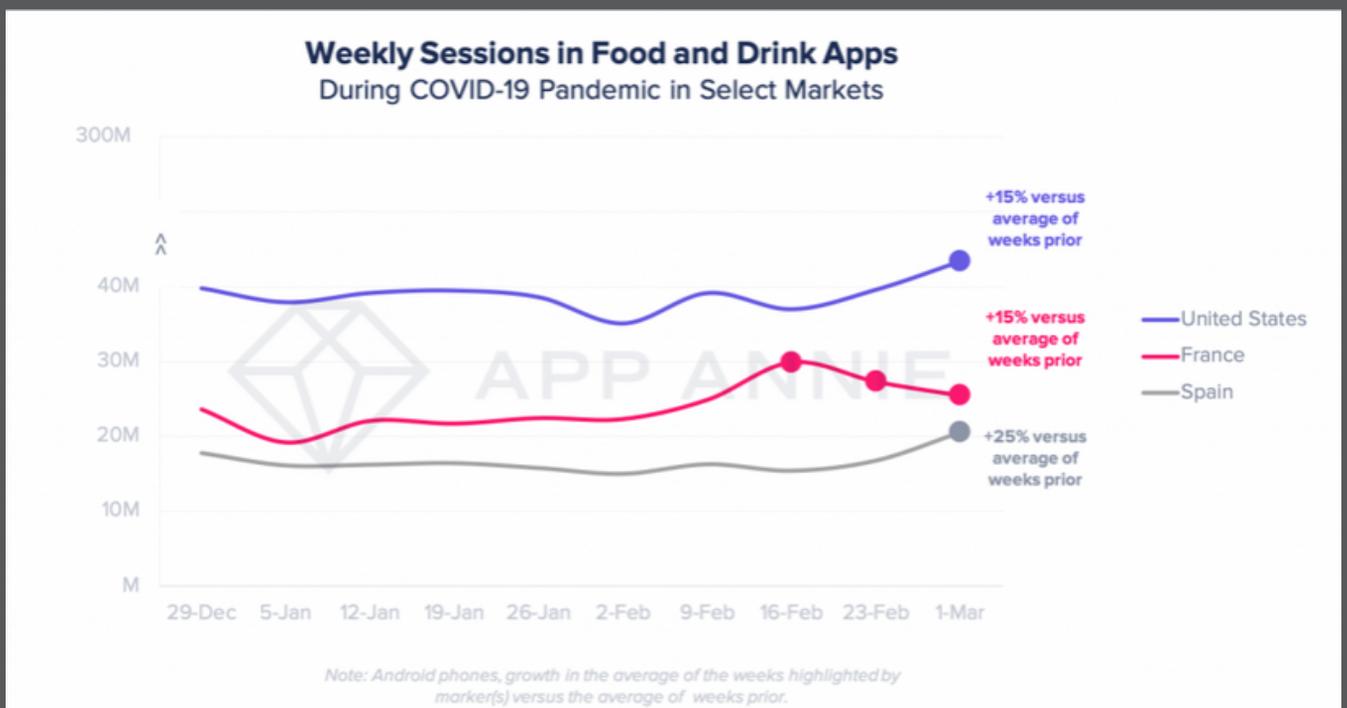
⁹ WPP Responding to Covid-19 Report

¹⁰ https://www.globalwebindex.com/hubfs/2019_theme/GWI%20Coronavirus%20findings%20-%20Travel%20and%20Comuting.pdf

Demand for Delivery Applications is Increasing

As people adjust to working from home and social isolation becomes widespread, people resort to takeaways and food delivery services. Due to these factors, unsurprisingly there is a noticeable increase in the use of applications that provide these services.

Spain, the USA and France, have experienced significant increases in these categories. serious increases in the session numbers of applications in these categories are noteworthy. ¹¹



France increased particularly in week commencing Feb 16th and a similar pattern emerged in Spain and the USA in week commencing March 1st. These sessions and restaurant insights is a reflection of the demand for food, as well as the status of the delivery or the purchase of products. This is the situation at the time of writing, though it is very likely that the situation will have changed especially with the introduction of new and/or more stringent government measures.



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<https://www.appannie.com/en/insights/market-data/coronavirus-impact-mobile-economy/>

Users Turn to Health Practices for Mental and Physical Health

Since the first week of March, the time spent in the health category of Android phones in the USA has been increasing.

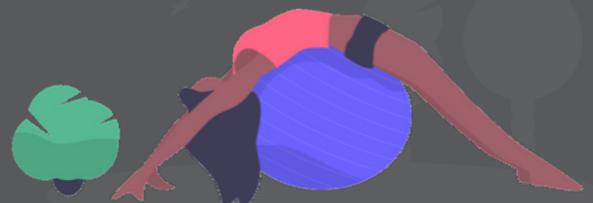
Users who are trapped at home due to increased rates of spending time, social distance practices and pandemic news are demanding these applications to relax themselves and gain stress control with meditation practices. In addition, applications that show sports exercises due to inactivity are another type of application used for users who want to do sports at home.

Increased time at home, isolation and social distancing and constant exposure to coronavirus (COVID-19) news and updates have led to an increase in apps enabling relaxation, relieving stress, and meditation. These applies to health and fitness apps for people working out and exercising at home.¹²

Average Weekly Hours Spent in Medical and Health and Fitness Apps During COVID-19 Pandemic



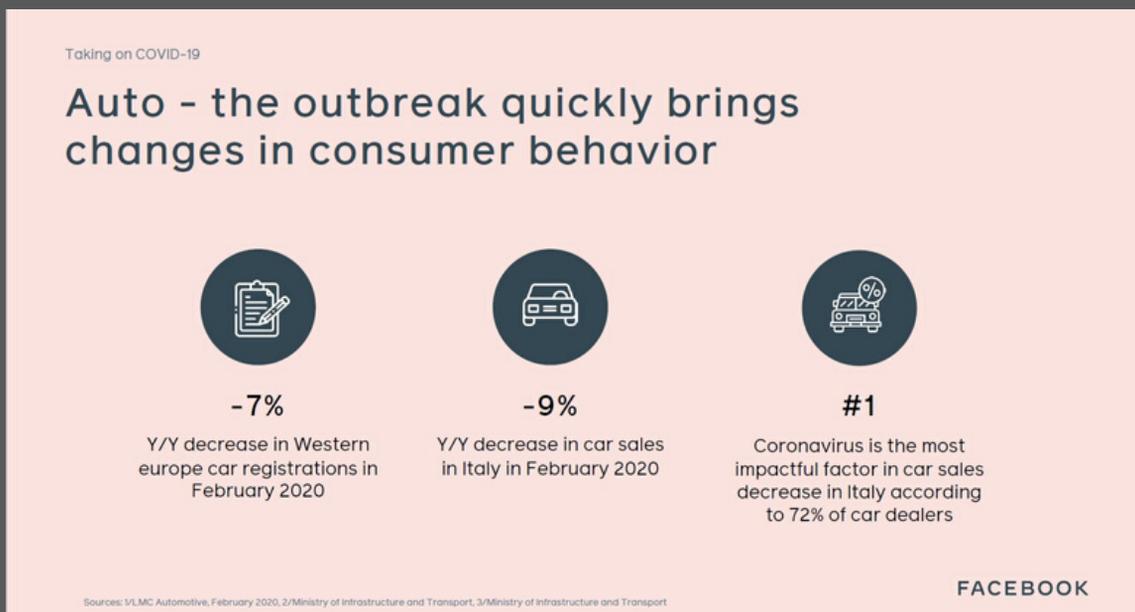
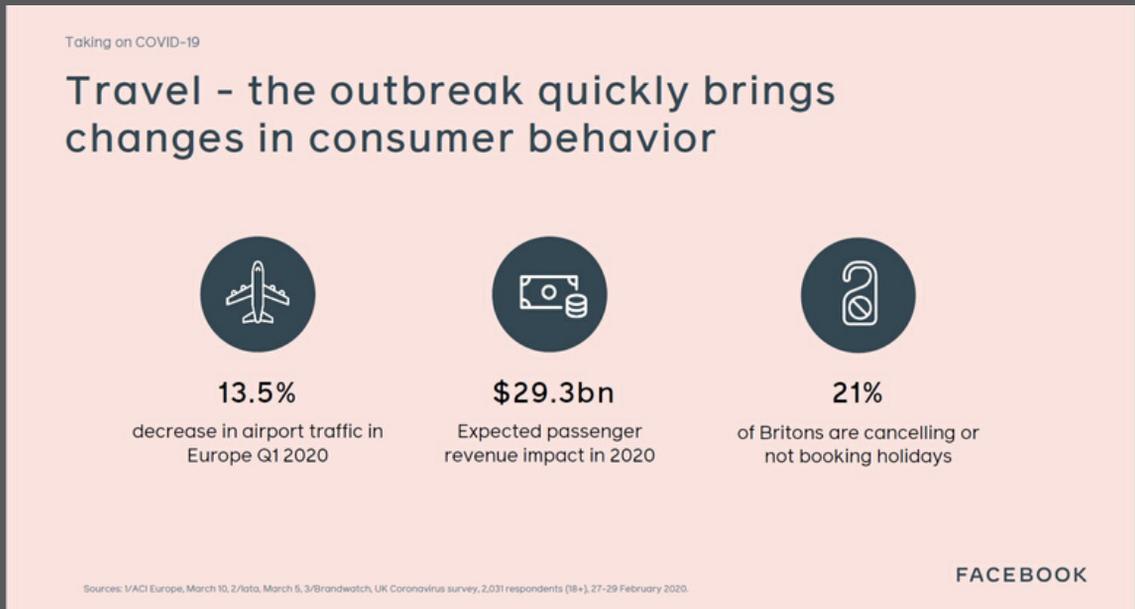
Note: Android phones



¹² <https://www.appannie.com/en/insights/market-data/coronavirus-impact-mobile-economy/>

Travel and Automotive Sector in Fall

In the first quarter of 2020, airport traffic in Europe has experienced a decline of 13.5%. 21% of British cancel their holiday reservation or make no reservation. In addition, automotive was the sector most affected by the pandemic in Italy. Sales fell by 72%, while sales in February fell 9% in annual comparison.¹³



13 Facebook Taking on Covid-19 Report

Conclusion

The most common conclusion we will make in the light of all the emerging data is that user habits are changing. Our way of thinking, behaviour and perceptions alter in the face of the pandemic. Therefore, brands within certain verticals – auto, travel, gaming, entertainment and health for example are affected by this crisis either positively or negatively.

Mobile reflects our current lives and its usage has become more reactive to the way we live our lives . It has assumed increased importance for socialising, entertainment, accessing services, information updates and for the role of mental and physical health and wellbeing. For example, sometimes it's a part of our job, sometimes it's a tool for us to have fun or other times it is for updates and to follow developments. As this continues the numbers such as time spent on mobile or application download rates will increase even more. Therefore, user behaviours every sector will evolve and adapt to this new situation. This is the context of the overall growth in total mobile usage at this stage (early March 2020) of this pandemic.

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