

# The 2020 State of Mobile for Marketers

MMA Webinar Series  
February 25, 2020



# MMA is the Global Industry Trade Assoc. for Marketing

Started in 2003; turned around in 2013

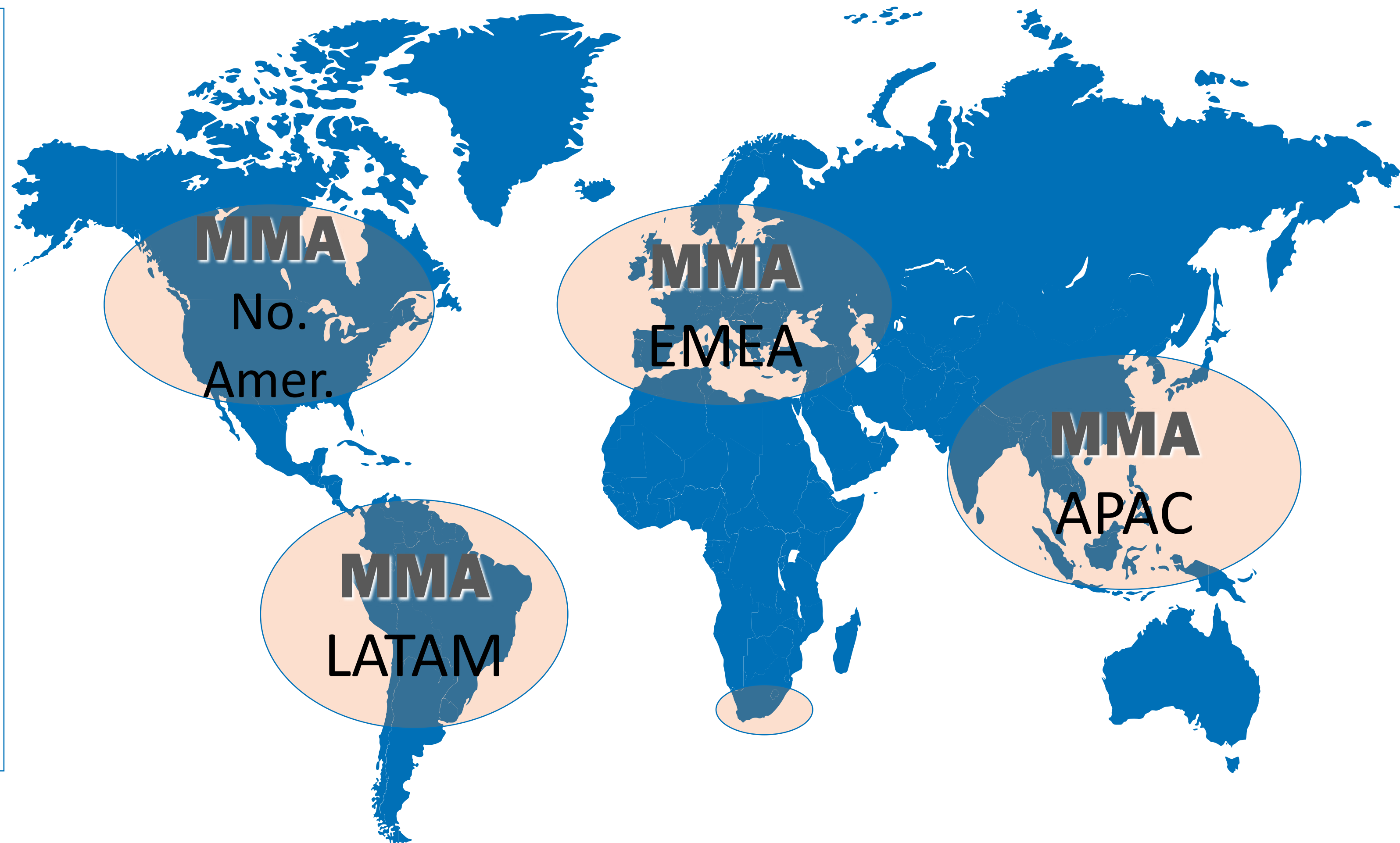
Marketer led; plus media sellers, tech and agencies

800+ corp. members worldwide

55+ team worldwide

Operations in 15 countries

25+ conferences in 15 countries

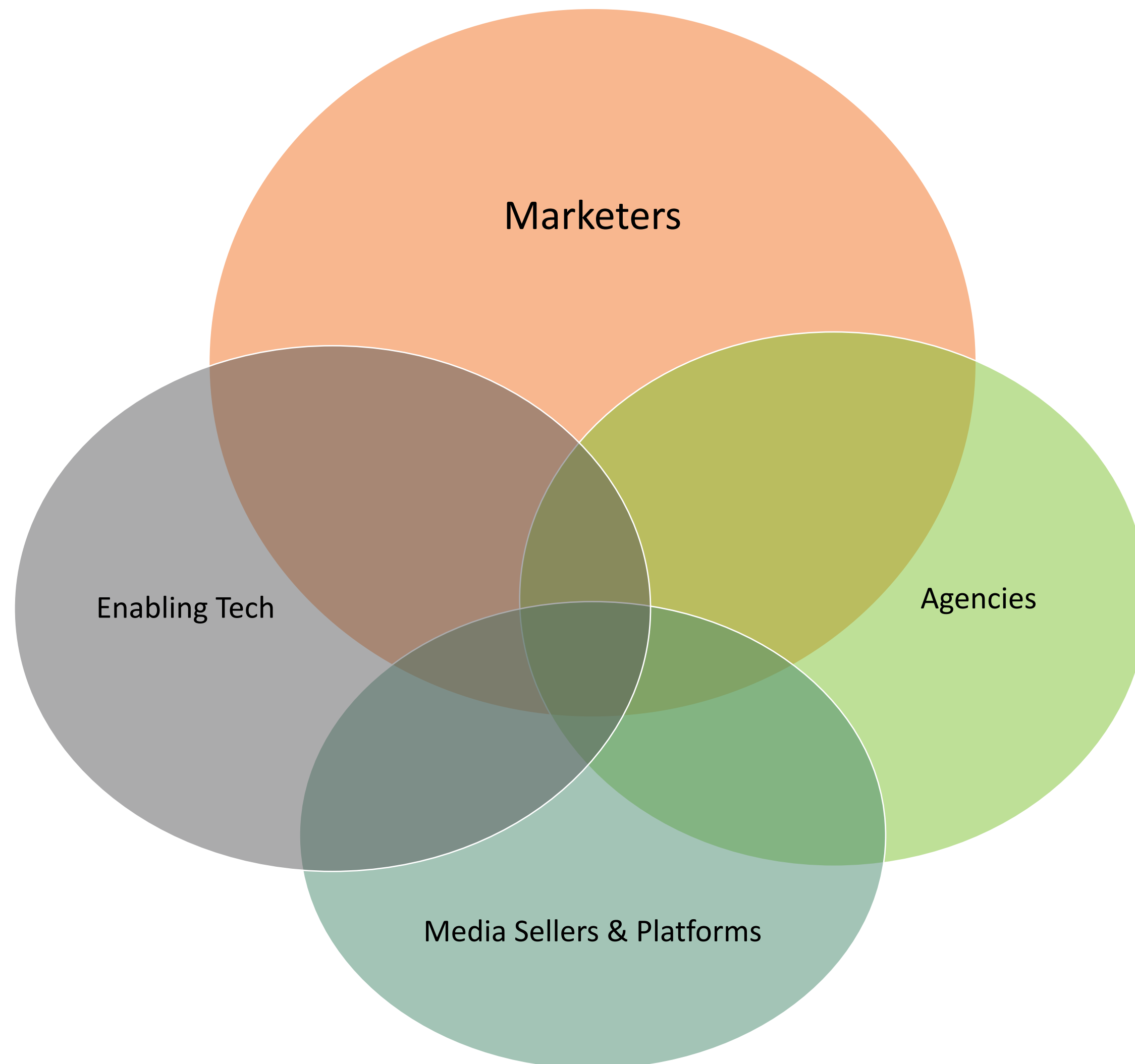


1. Brazil
2. Argentina
3. Mexico
4. U.S.
5. China
6. Indonesia
7. India
8. Vietnam
9. UK
10. France
11. Spain
12. Germany
13. Turkey
14. Middle East
15. South Africa



# MMA is (uniquely) the Whole Marketing Ecosystem

MMA is only group that is “big tent” and global. Our programs bigger than just mobile



## Focus of Trade Groups

Fundamentally, MMA is about defining the future of marketing, & then marching the industry in that direction

## Components of Successful Trade Group

1. Great Governance
  - a. Board mix & leadership
2. Must Attend Events
3. Great Initiatives
  1. Fewer bigger programs



# MMA's Purpose

**WHO** (The People We Serve):

**Prime Audience:** Pioneering Chief Marketers

**WHY** (Our Reason for Being):

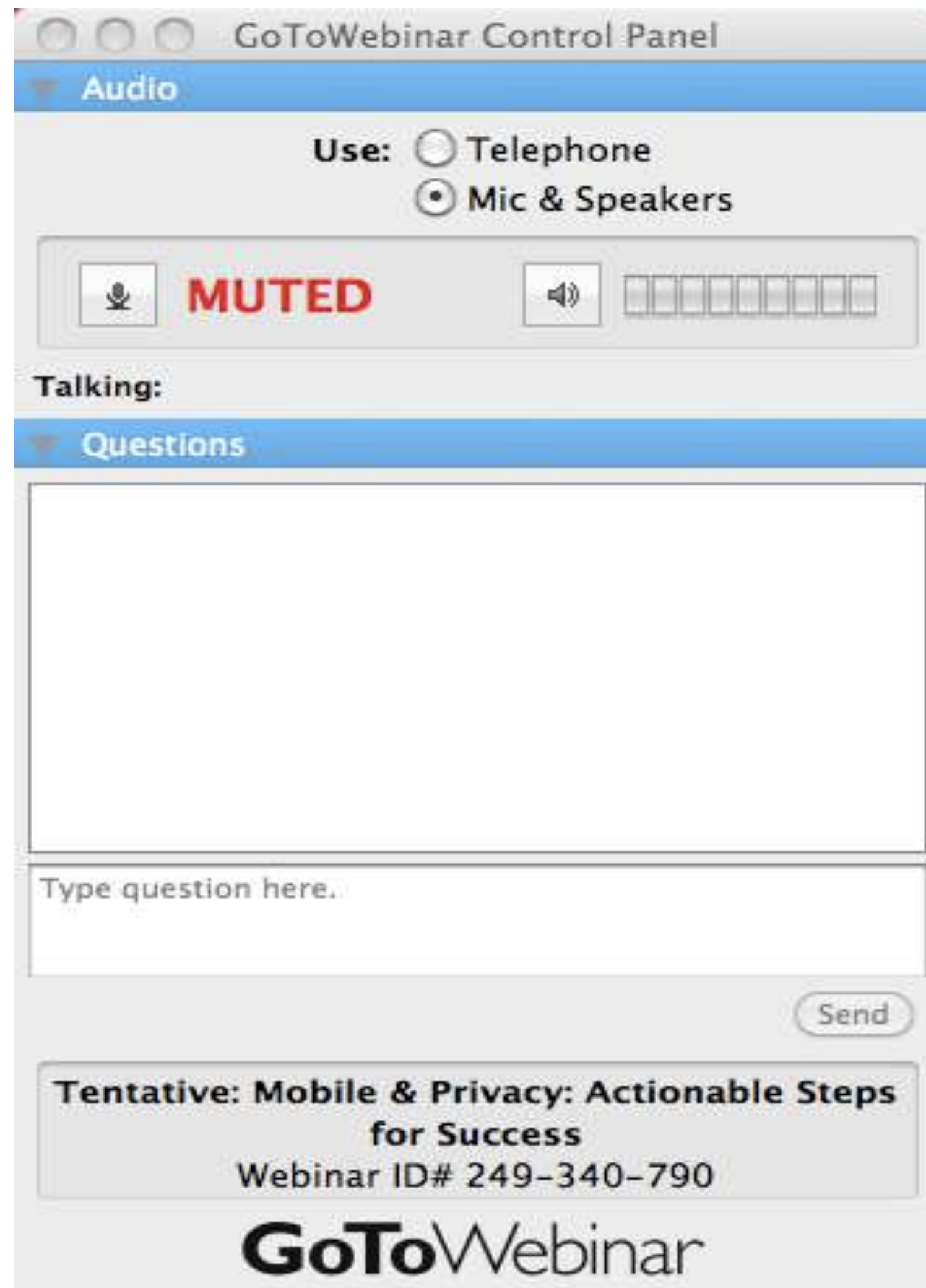
**Purpose:** To enable marketers to drive innovation and enduring business value in an increasingly dynamic and mobile-connected world.

**WHAT** (Our Strategic Priorities):

1. **Measurement & Business Impact:** Drive marketing effectiveness and the future of measurement for sustainable business growth
2. **Marketer Org Development:** Redefine marketing organization dynamics and future capabilities needed in a data and device connected world
3. **Inspiration:** Lead marketing innovation and creative effectiveness/impact for mobile and emerging technologies
4. **Advocacy:** Establish standards and self-regulatory guidelines to improve consumer trust and confidence in marketing and connected devices



# MANAGING YOUR QUESTIONS



Share the Insights

#MMAWeb

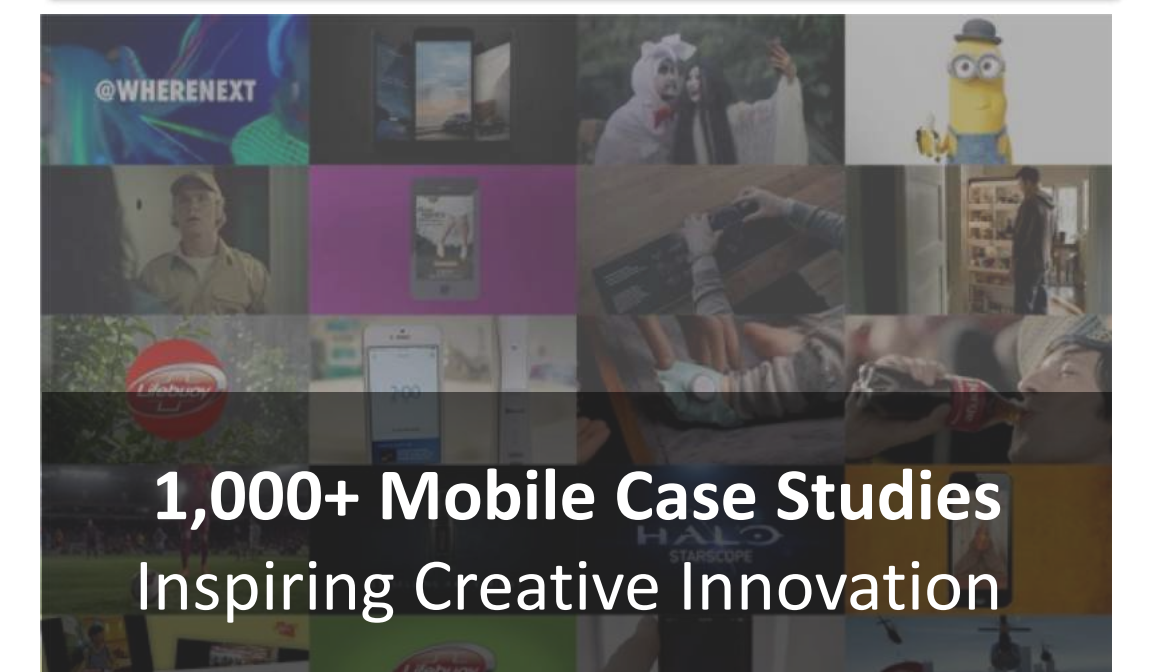
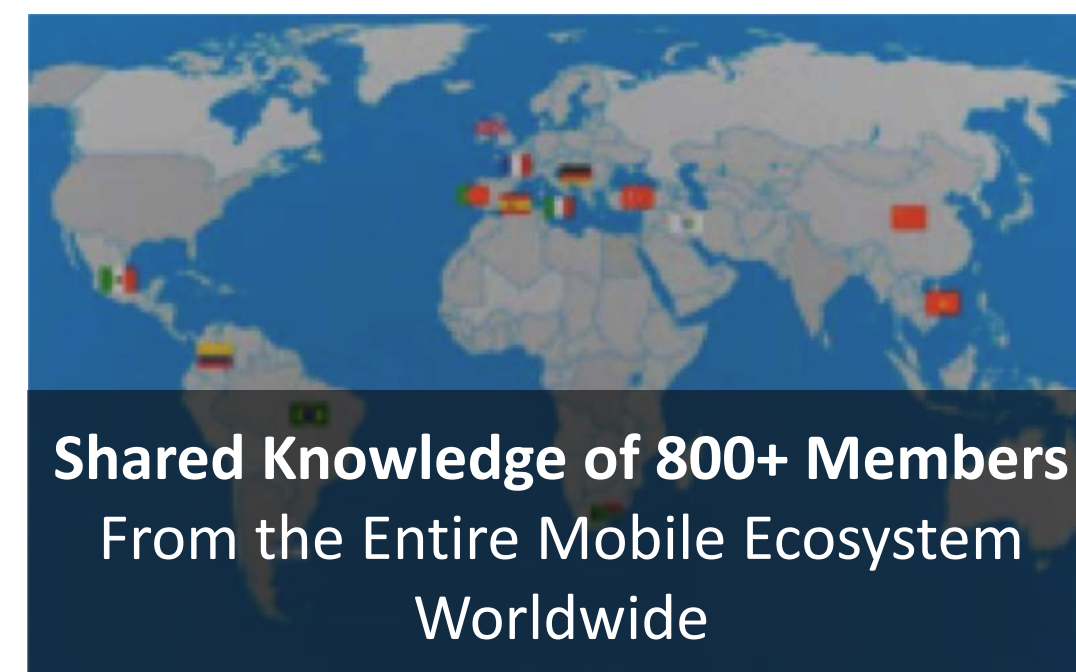
# MMA IS 800+ MEMBERS STRONG GLOBALLY

MARKETERS, AGENCIES, MEDIA SELLERS, TECHNOLOGY & OPERATORS





# MMA RESHAPING THE FUTURE OF MARKETING





## PRESENTERS



Jay Hinman

*Director of Marketing, Americas*  
App Annie



Amir Ghodrati

*Director, Market Insights*  
App Annie

## MODERATOR



Leo Scullin

*VP of Industry Programs*  
Mobile Marketing Association







# The 2020 State of Mobile for Marketers

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# Agenda

- Macro Mobile Trends
- Vertical Highlights
- Mobile Marketing Trends
- Mobile Marketing Case Studies
- Q&A

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# Macro Mobile Trends

Looking for More?

Download the full State of Mobile 2020 report:

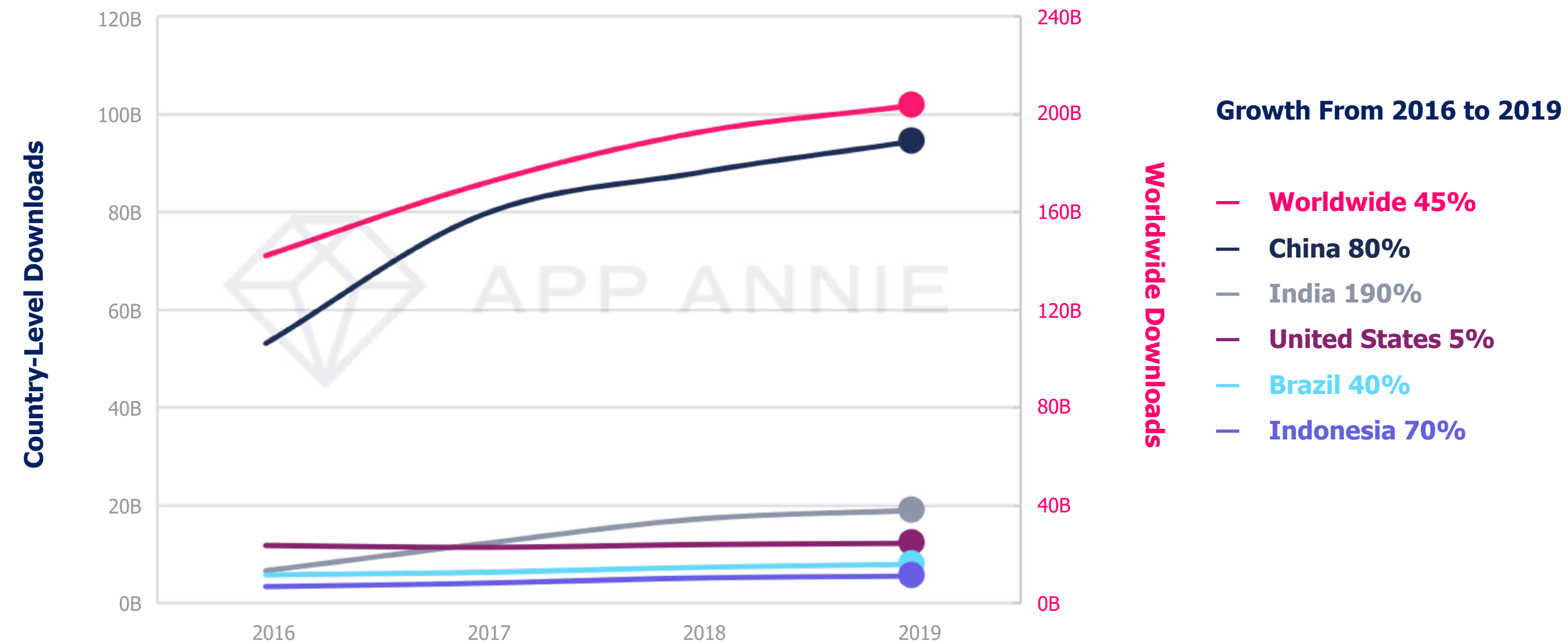
[bit.ly/SOM2020MMA](https://bit.ly/SOM2020MMA)



## MACRO MOBILE TRENDS

# Consumers Downloaded a Record 204 Billion Apps

## Top Countries by App Store Downloads



*Note: iOS, Google Play, Third-Party Android in China combined*

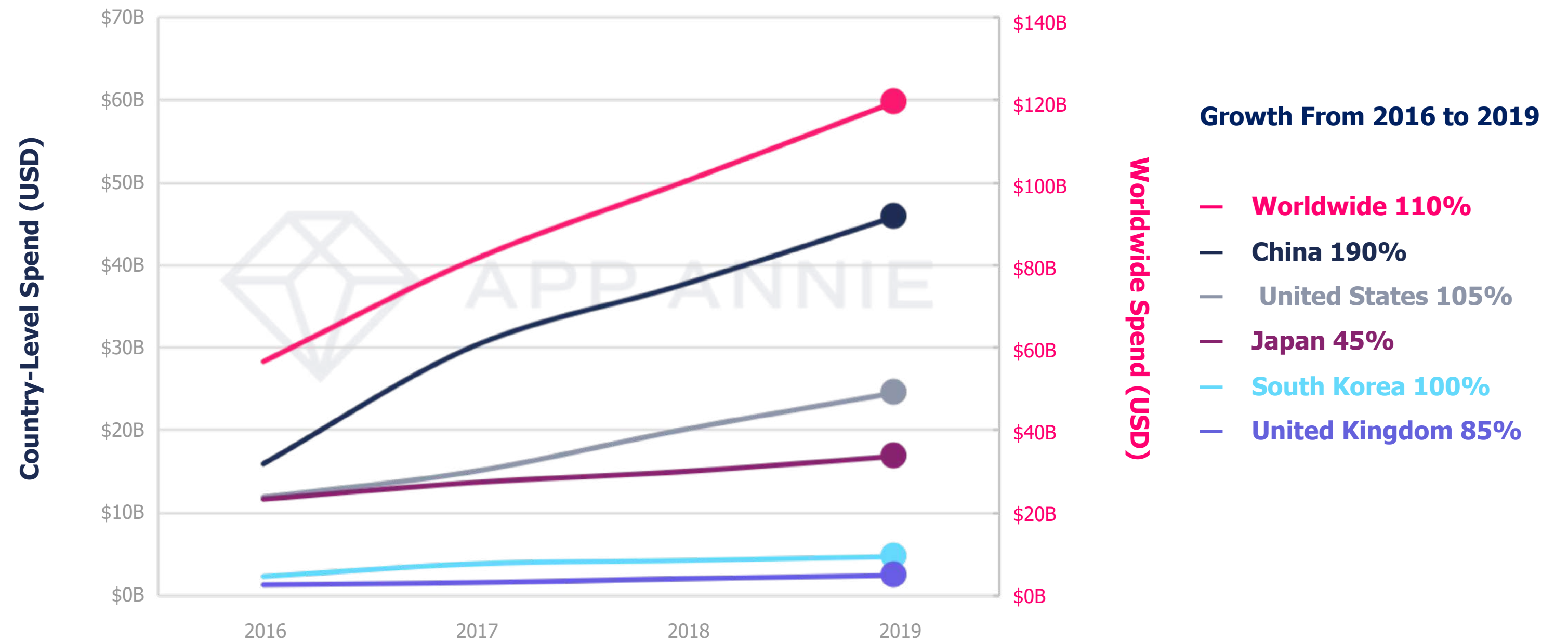




## MACRO MOBILE TRENDS

# Consumer Spend Hit \$120B, up 2.1x From 2016

### Top Countries by App Store Consumer Spend



*Note: Spend is gross — inclusive of any percent taken by the app stores; iOS, Google Play, Third-Party Android in China combined*

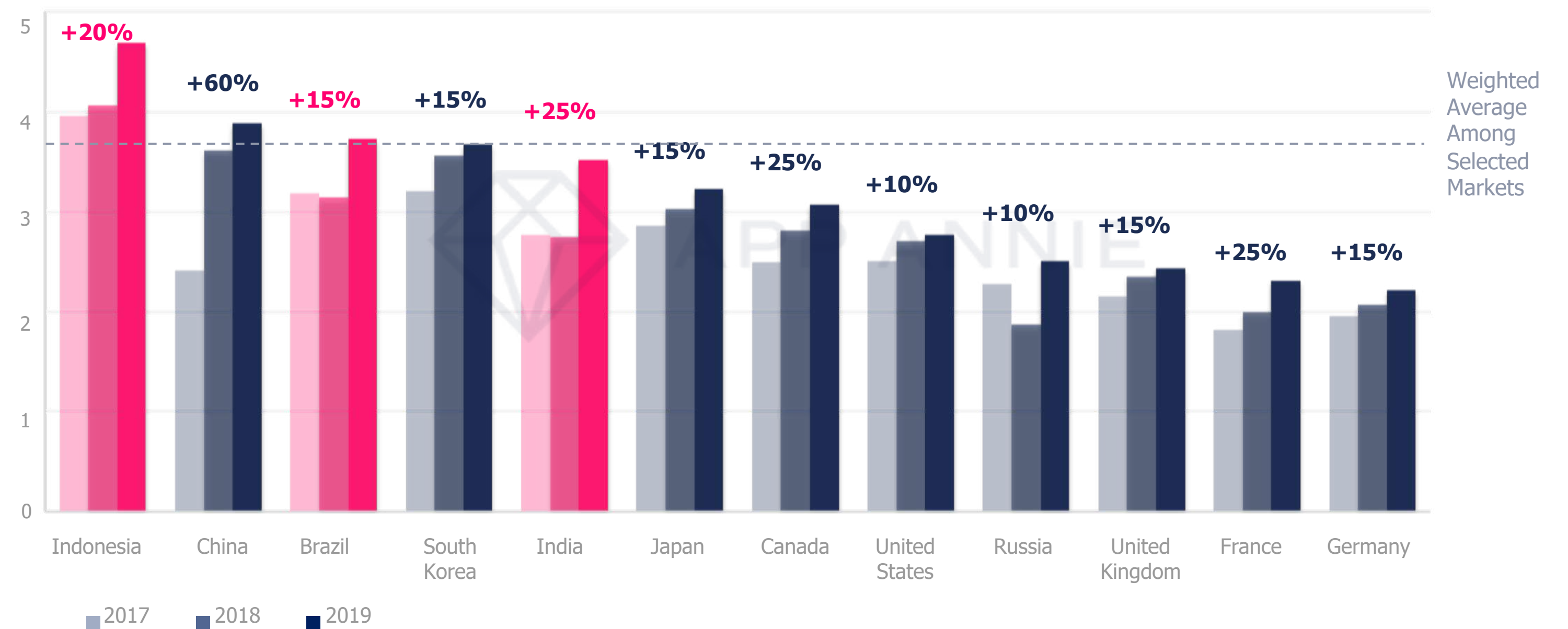


## MACRO MOBILE TRENDS

**Mobile Is Our Go-To Device, Capturing 3 Hrs 40 Min Per Day**

### Average Daily Hours Spent Per Device on Mobile

Emerging Markets      Mature Markets



*Note: Android phones*

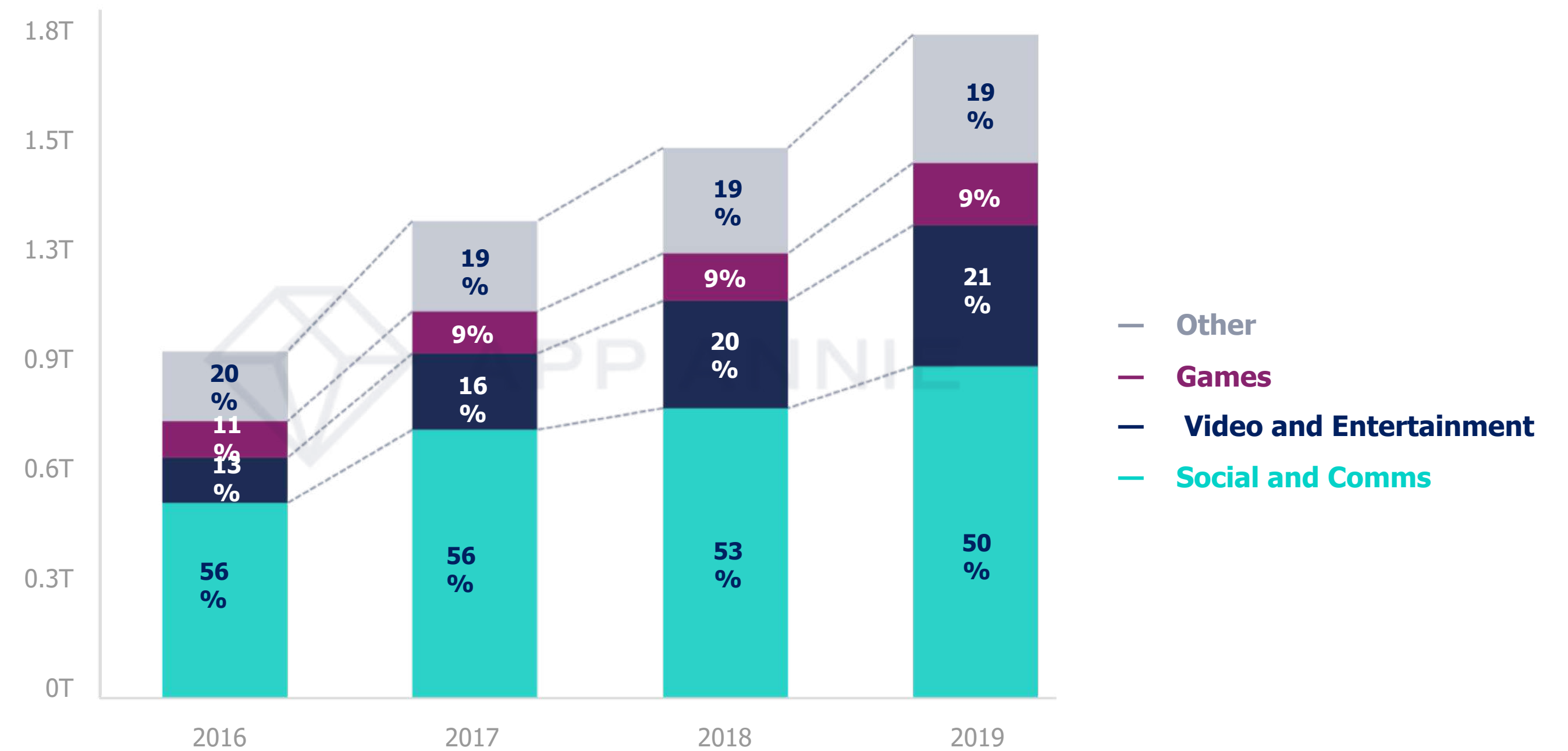




## MACRO MOBILE TRENDS

# 50% of Time Spent on Mobile Is in Social and Comms

### Global Hours Spent on Mobile by Category

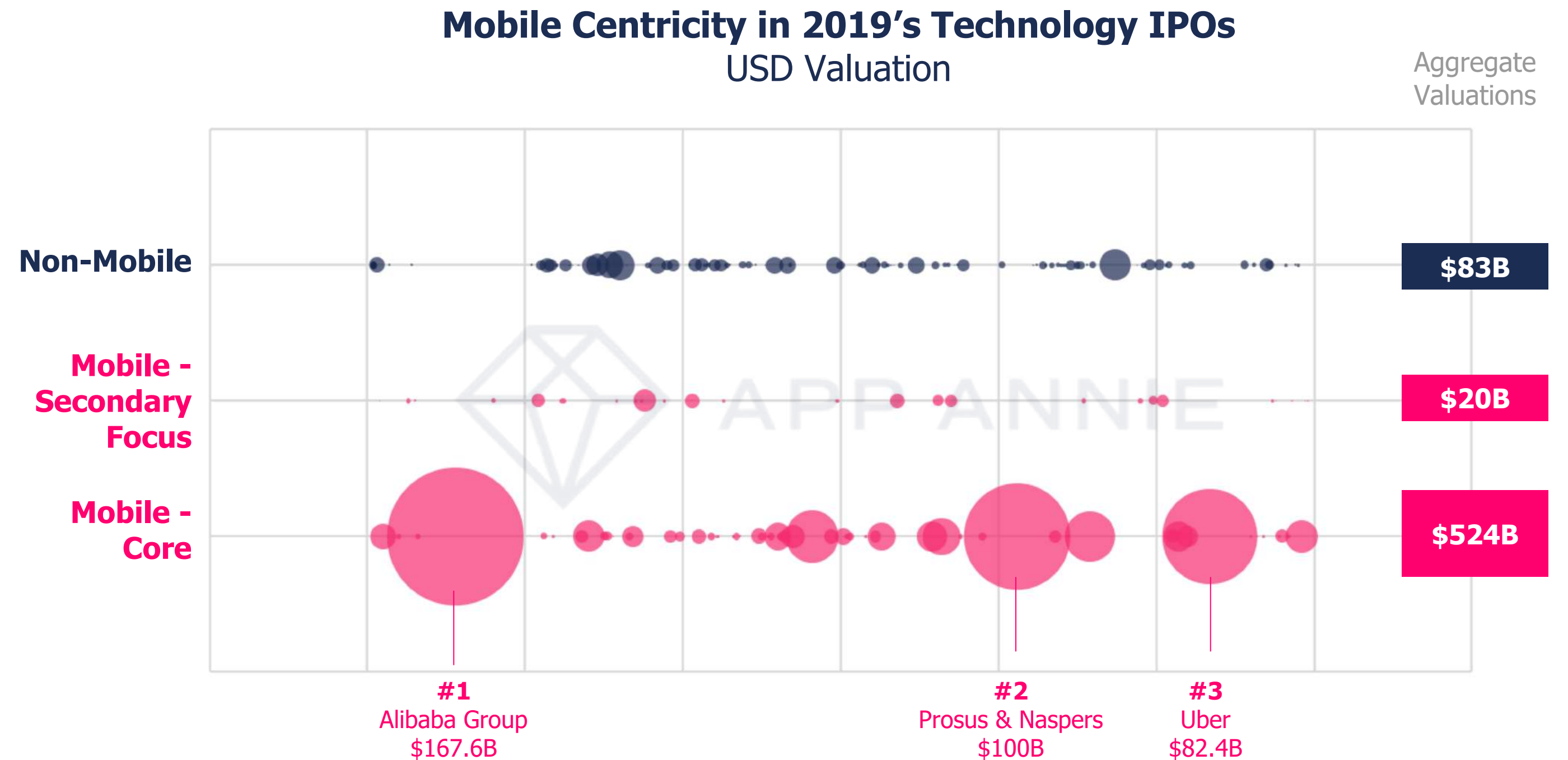


*Note: Android phones, Worldwide excluding China*



## MACRO MOBILE TRENDS

**Mobile-First  
Companies Saw  
825% Higher Avg  
IPO Valuation**



*Bubble Size = Valuation (USD)  
Companies Sorted Alphabetically on X-axis  
Note: Technology IPOs globally  
In absence of valuation, debut market cap was used.  
IPO Valuation or Market Cap (USD) for 195/214 companies available*





## Gen Z's Mobile Engagement in 2019

### MACRO MOBILE TRENDS

**Don't Miss Out:  
Gen Z Has 60% More  
Sessions Per User in  
Top Apps Than Older  
Demographics**

**3.8**  
HOURS

Spent per app per month per  
user among top 25 non-gaming  
apps on average

**150**  
SESSIONS

Per app per month per user  
among top 25 non-gaming apps  
on average

*Note: Top 25 Apps by MAU excluding pre-installed apps, Android  
phones only, Average across Brazil, Canada, France, Germany, Indonesia,  
Japan, South Korea, UK, US*



# The Mobile Performance Standard

Through our mobile data and insights platform, we help create winning mobile experiences for those aspiring to achieve excellence



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# Vertical Highlights

Looking for More?

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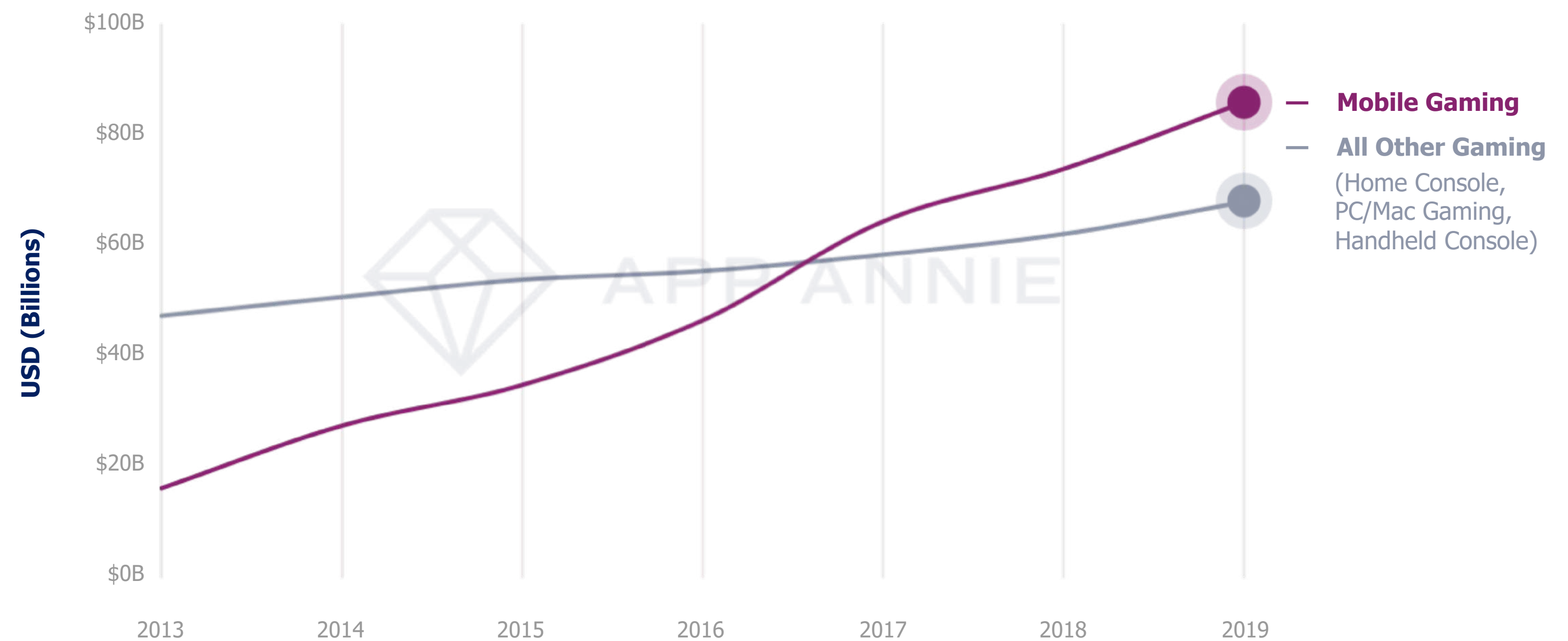
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## MOBILE GAMING

# Mobile Gaming Is the World's Most Popular Form of Gaming

Global Consumer Spend in Games



*Note: Other Gaming data from IDC; 2019 data for other gaming is projected, Mobile Gaming data is iOS, Google Play, Third-Party Android in China combined*

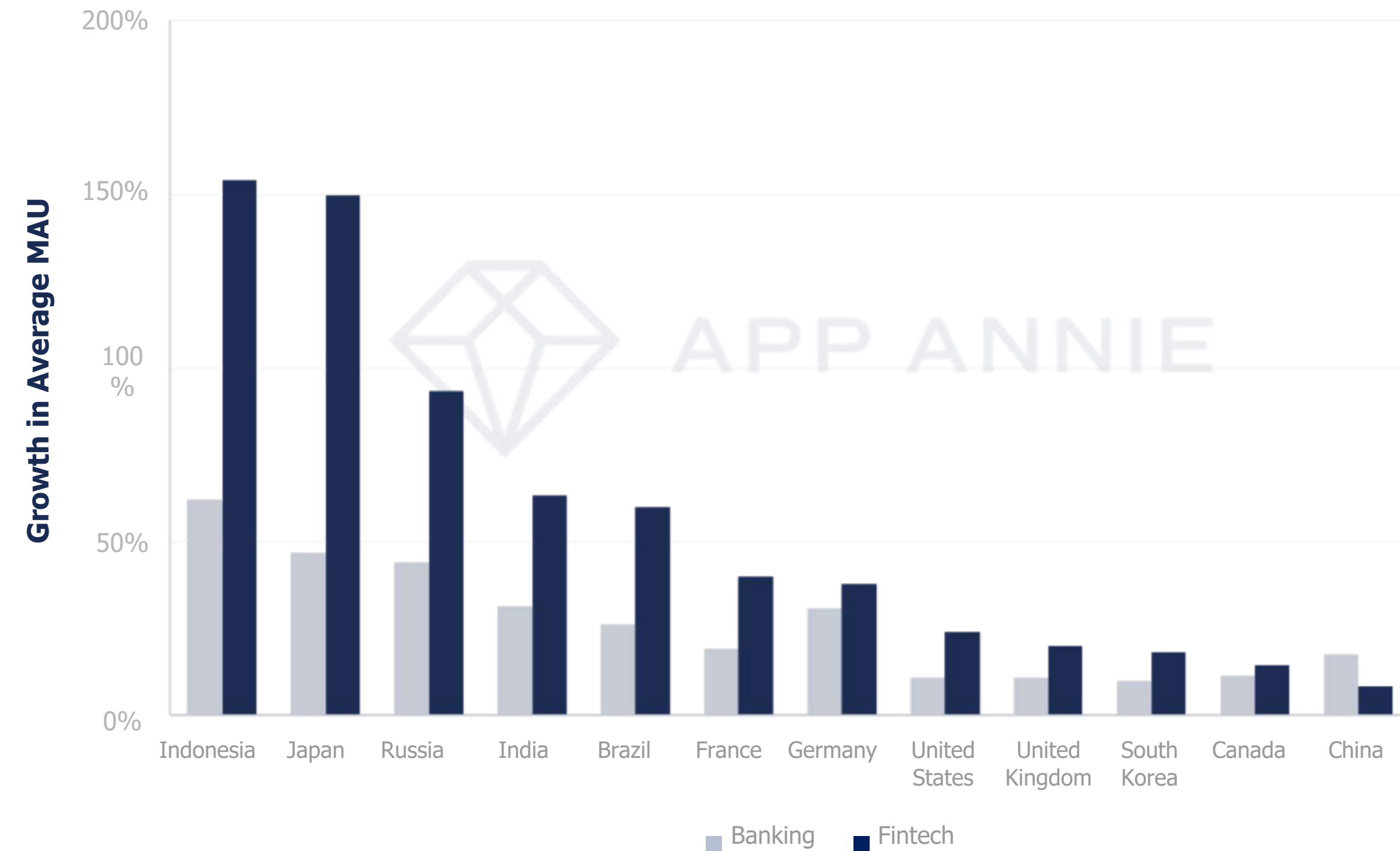


## FINANCE

# User Base Growth of Top Fintech Apps Topped Traditional Banking Apps

## Growth in Average MAU From 2018 to 2019

Traditional Banking Apps vs. Fintech Apps



*Note: Combined iPhone and Android phones: Average of Top 10 Apps by MAU*



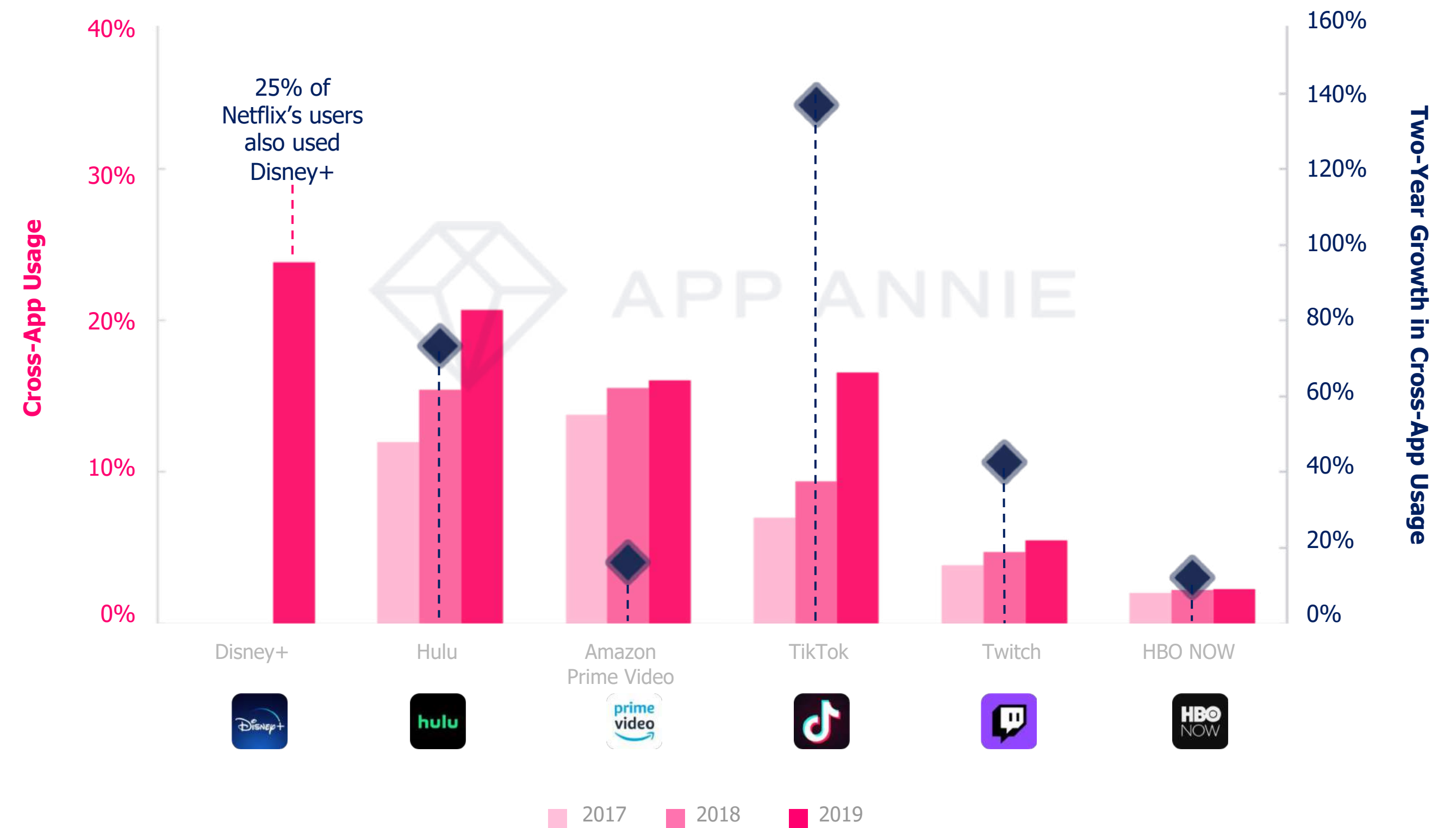


## VIDEO STREAMING

# *TikTok & Disney+* Carve Into Crowded US Video Streaming Market



Percent of Netflix Users Who Also Use...  
iPhone, US, 2019



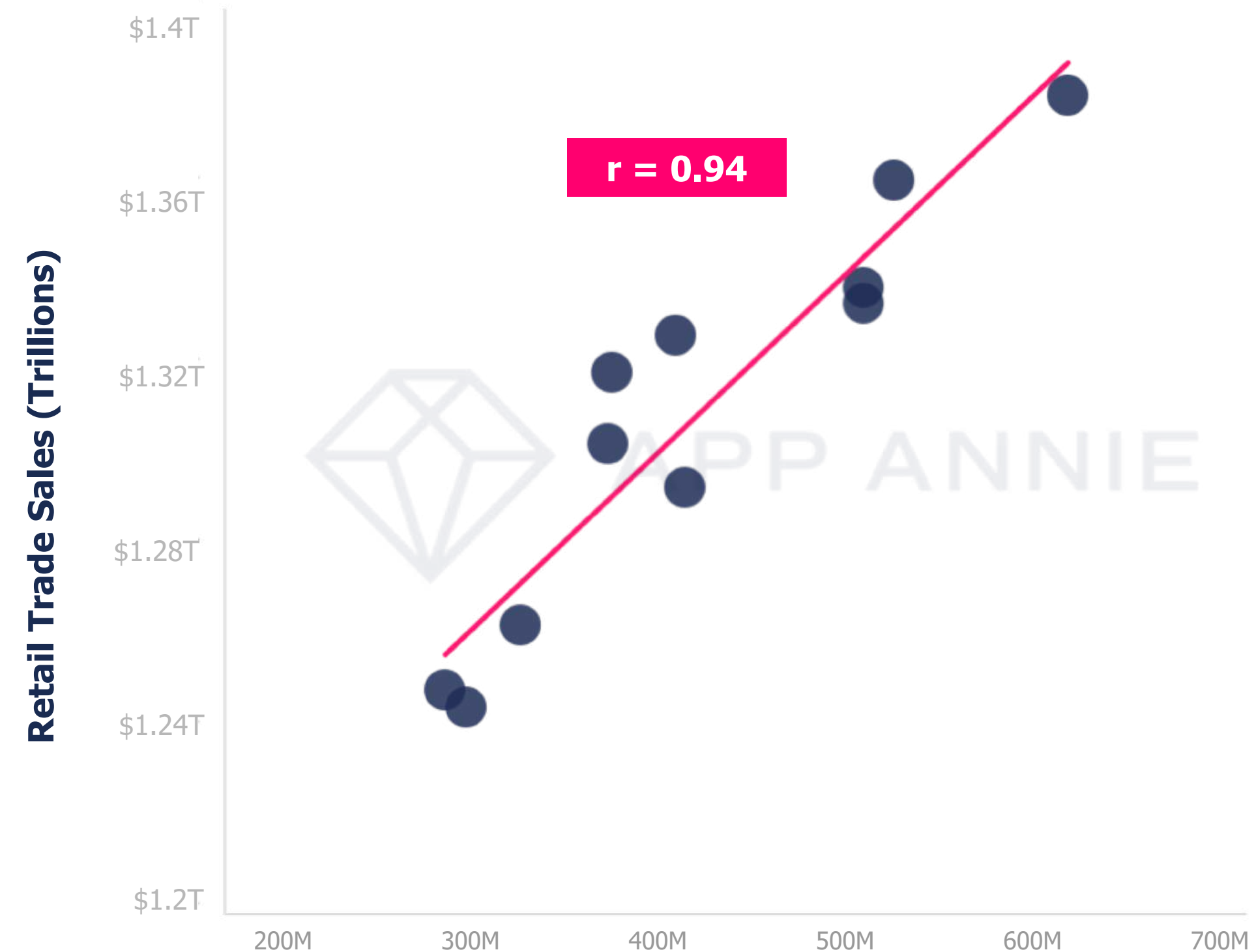
Note: Disney+ launched in Nov 2019, data is for Nov - Dec 2019



**RETAIL**  
**Time Spent in Shopping Apps Drives Online and In-Store Conversions**

**Correlation of Quarterly Retail Trade Sales and Time Spent in Retail Apps**

Q1 2017 – Q3 2019 | United States



**Total Hours Spent in Retail Apps**

Source: US Census and App Annie

Note: Android phones: Average of Top 10 Shopping Apps (Digital-First, Bricks-and-Clicks, Peer-to-Peer Marketplaces) by MAU

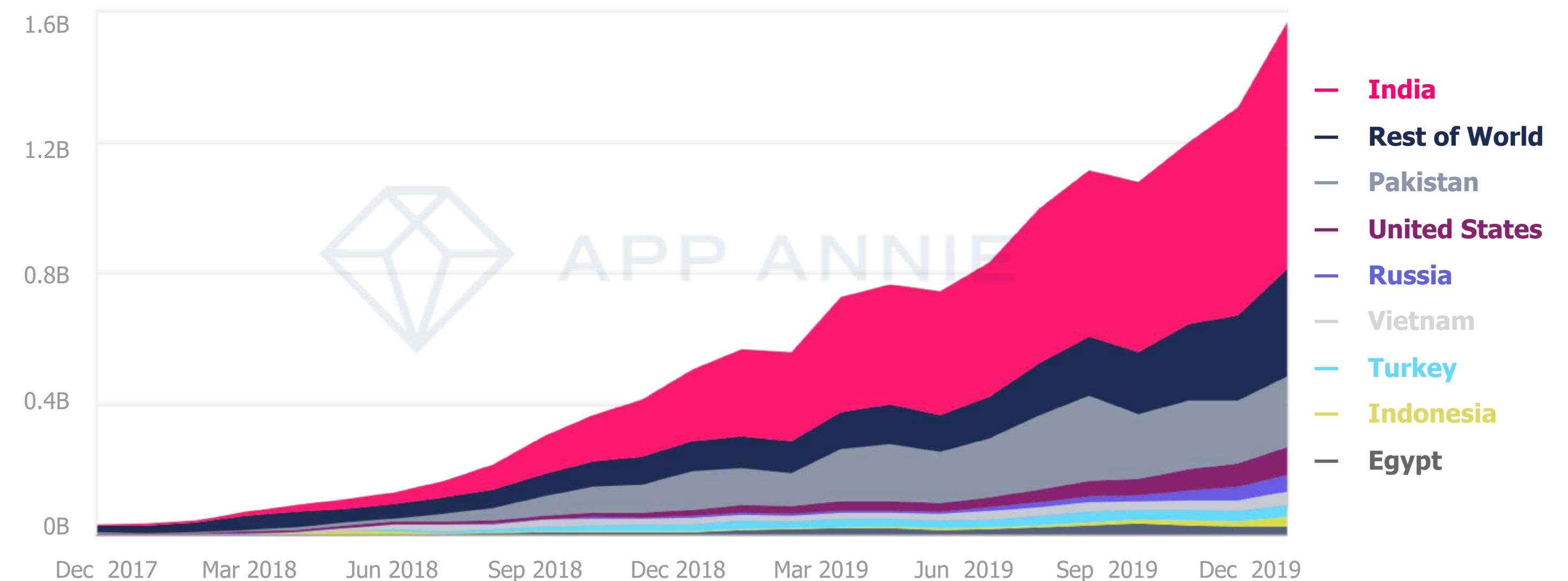


**SOCIAL**

# TikTok Tidal Wave: Time Spent Exceeded 68B Hours in 2019



**Growth in Hours Spent in TikTok Outside of China**



*Note: Android phones*



# Mobile Marketing Trends

Looking for More?

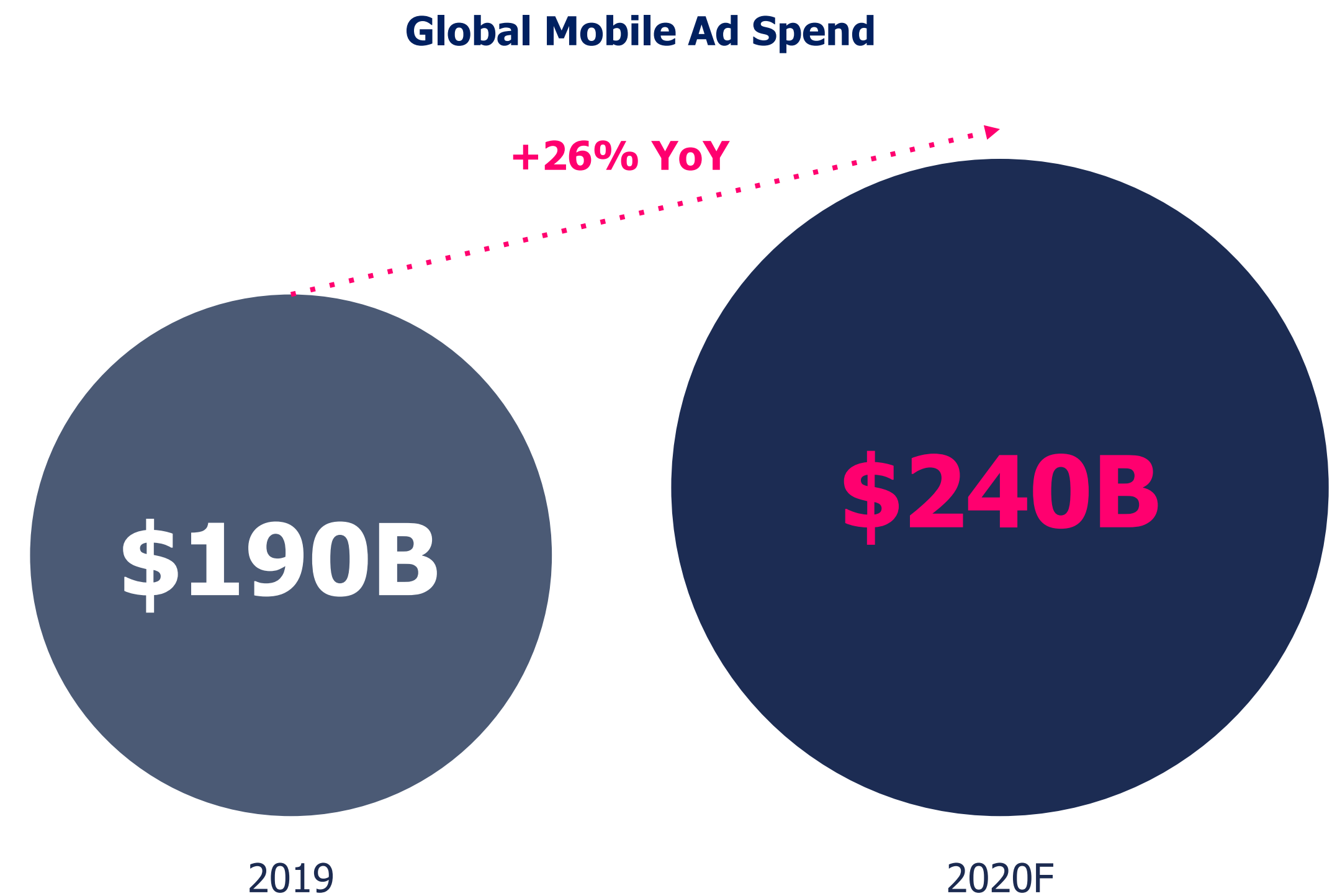
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## MOBILE MARKETING TRENDS

**2020 Is Set to Be  
Mobile's Biggest Year,  
With Advertising Fueling  
Revenue**

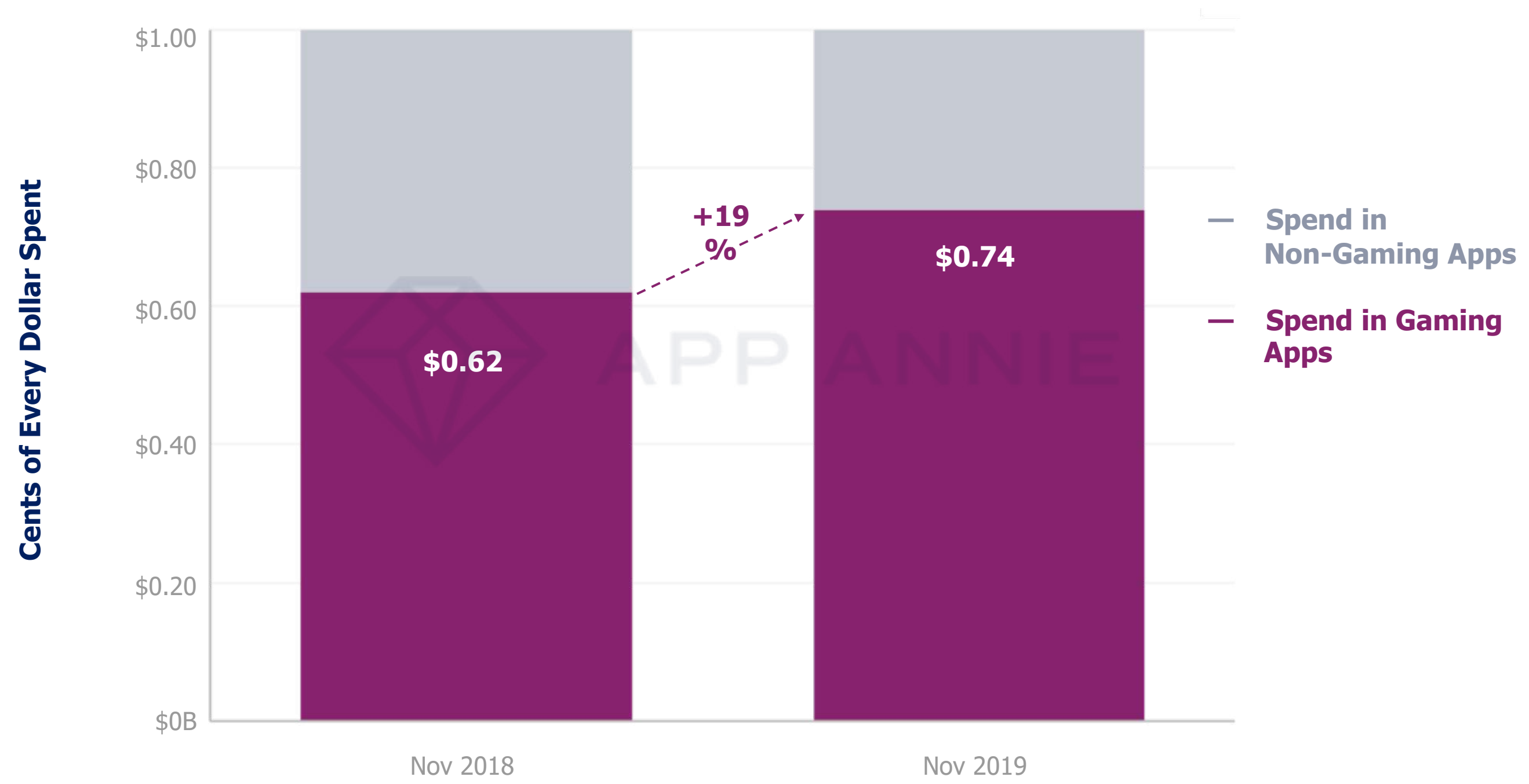




MOBILE MARKETING TRENDS

# Companies Increased Spend on Branding Ad Campaigns in Games

Distribution of Brand DSP Spend on MoPub's Exchange



*Note: Source is MoPub; Brand DSPs as determined by MoPub (aka omni-channel DSPs) run the majority of their campaigns with a focus on meeting branding or brand performance KPIs*

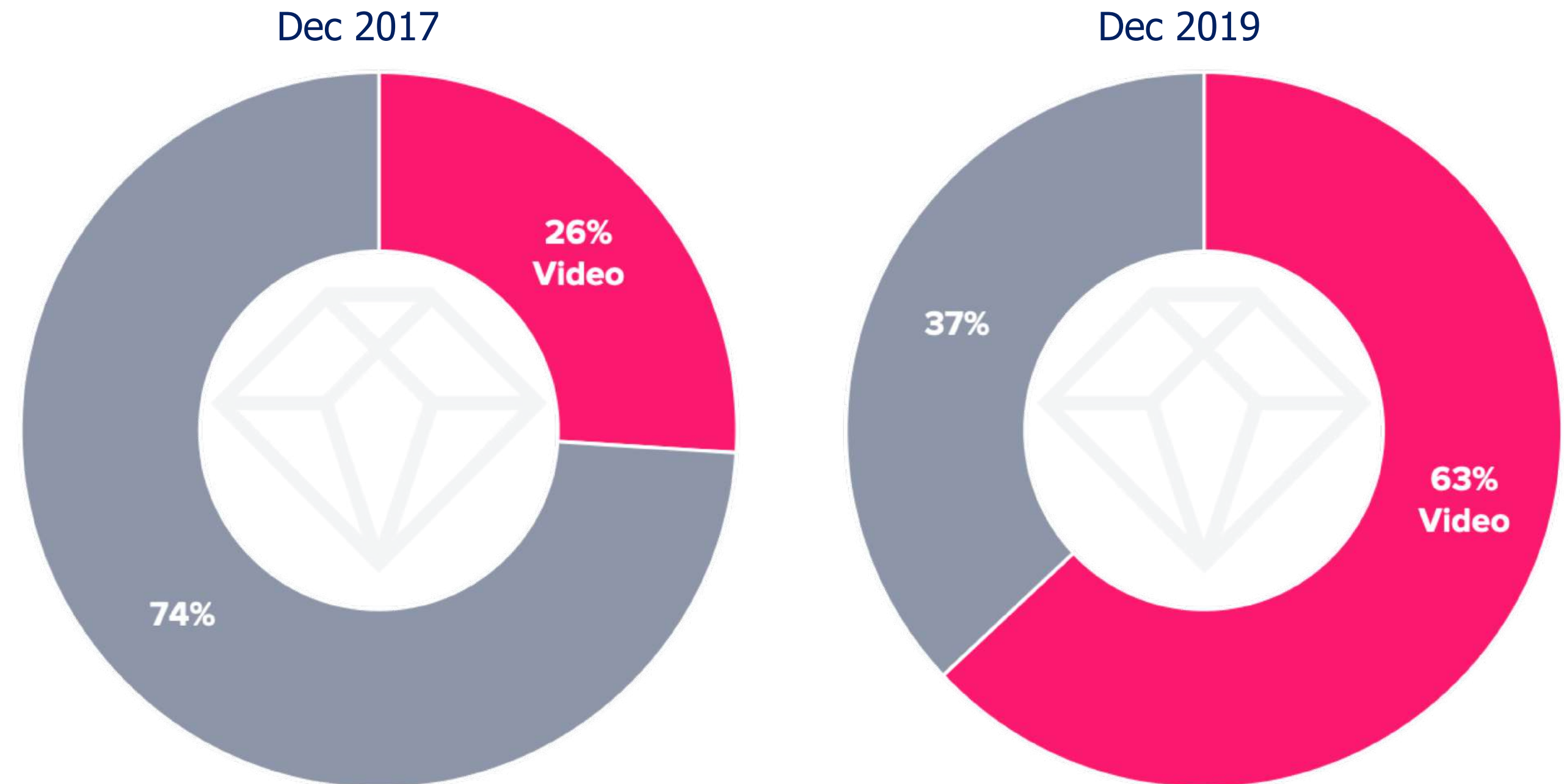




## MOBILE MARKETING TRENDS

**Video Ads Are a Best Practice on Mobile, up 37 Percentage Points Over 2 Years**

### Video's Portion of Mobile Ads US, iPhone



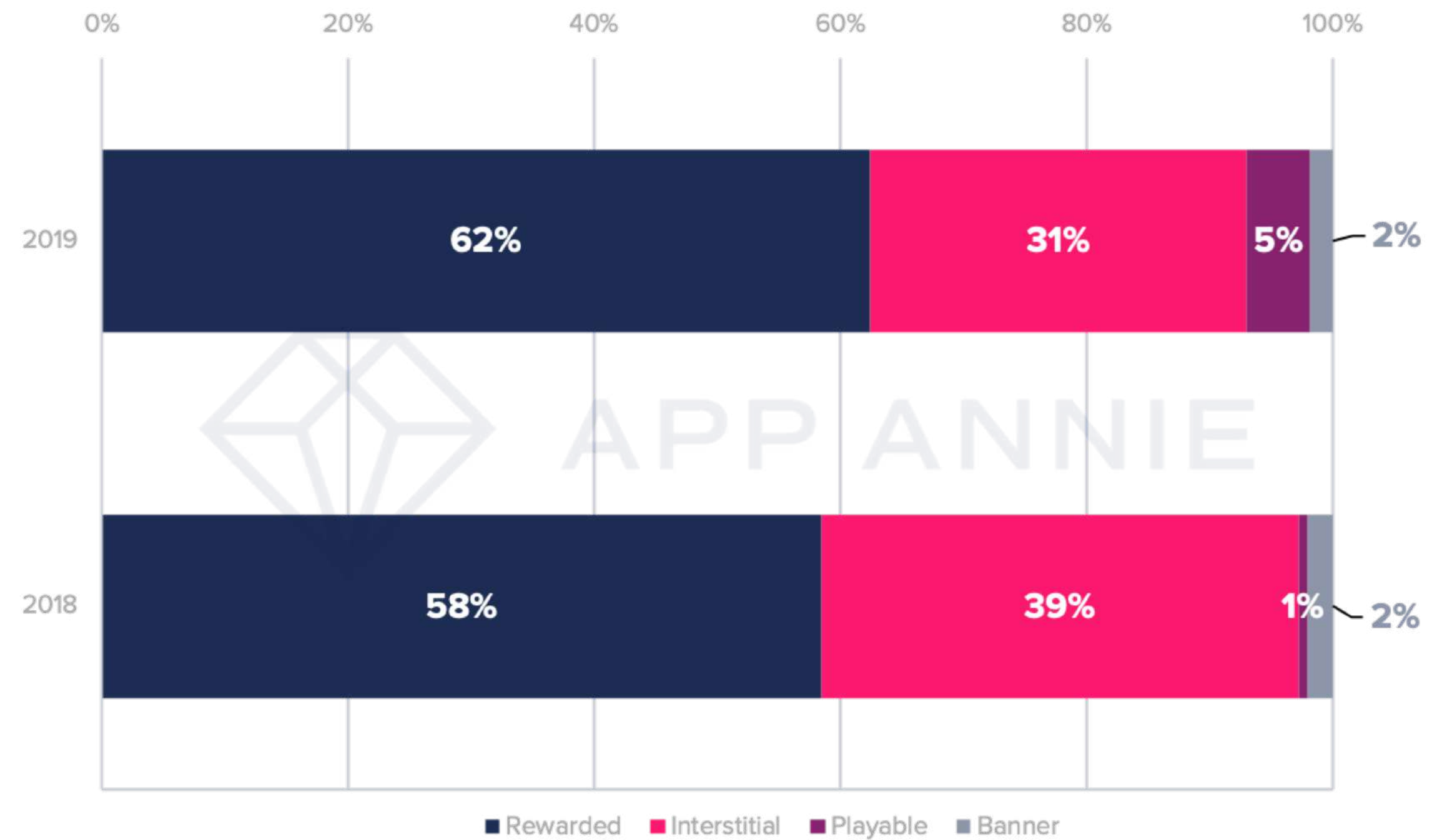
*Note: Anonymized Ad Platform*



## MOBILE MARKETING TRENDS

# Rewarded Ads Lead for Volume

Distribution of In-App Advertising by Ad Type, United States



# Mobile Marketing Case Studies

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## CASE STUDY 1: ASO

# Gain a Competitive Edge From Monitoring Competitor Keywords

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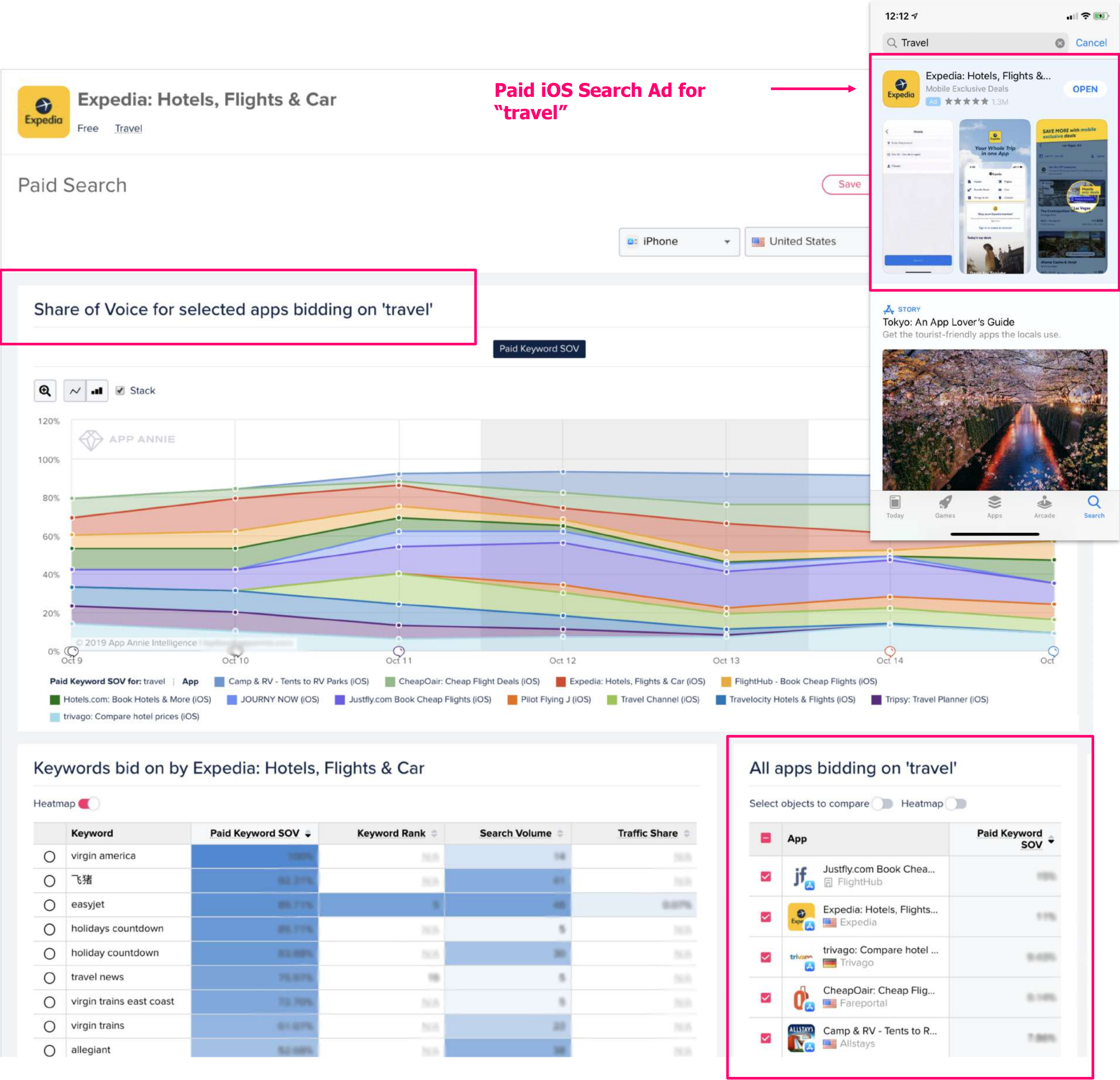
The screenshot displays the App Annie ASO Keywords tool interface. At the top, the Uber app is selected for analysis, with filters for iPhone, United States, and the period Jan 7 - Feb 5, 2020. The 'ASO Keywords' report is open, showing a comparison between Uber and Lyft. The interface is divided into three main sections: 'Unique for Uber', 'Shared Keywords', and 'Unique for Lyft'. Each section contains a list of keywords in a grid format. A red button at the bottom right says 'Analyze selected keywords (30)'.

Unique for Uber	Shared Keywords	Unique for Lyft
uber driver app	uber	lyft driver app
uber eats	lyft	super shuttle
siri	lift	waze
ube	lyft app	tap30
uper	uberx	yellow cab
uber partner	taxify	wayz
uber driver	uner	lyft driver
apple pay	uber app	lime
u	ola	limescooter
yber	uver	via
uber taxi	left.	curb
grab	bird scooter	lyst



CASE STUDY 2: PAID SEARCH ADS

# Uncover Which Apps Are Bidding on Your Target Keywords and How That Impacts Share of Voice







### CASE STUDY 3: PAID USER ACQUISITION

# Use a Diversified Ad Strategy Across Both Long, Steady Drip Campaigns and Short, Burst Campaigns

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Creative	Advertiser App	Apps Seen In	Share of Network	Share of Advertiser	Top Countries/Regions	First Seen	Last Seen	Active
	Instagram	1,948	0.69%	3.52%	... 4	Oct 16, 2019	Feb 5, 2020	113 Days
	Instagram	2,131	0.53%	2.73%	... 4	Oct 17, 2019	Feb 5, 2020	112 Days
	Instagram	1,131	0.23%	1.19%	... 3	Oct 16, 2019	Feb 5, 2020	113 Days
	Instagram	989	0.21%	1.07%	... 4	Dec 10, 2019	Feb 5, 2020	58 Days
	Instagram	868	0.20%	1.03%	... 4	Dec 11, 2019	Feb 5, 2020	57 Days
	Instagram	599	0.20%	1.03%	... 6	Jul 5, 2018	Feb 5, 2020	581 Days
	Instagram	818	0.19%	0.99%	... 4	Dec 10, 2019	Feb 5, 2020	58 Days
	Instagram	330	0.18%	0.92%	... 5	Jan 23, 2020	Jan 29, 2020	7 Days
	Instagram	755	0.14%	0.70%	... 4	Oct 17, 2019	Feb 5, 2020	112 Days

Long, Steady Drip Campaign

Shorter, Burst Campaign





## CASE STUDY 4: ORGANIC DOWNLOADS

# Time Strategic ASO Updates With Topical Events to Get an Extra Boost in Downloads

Compare [About this report](#)

Save

Subscribe & Share

Export

Video Streaming (4 ob... ▾

Unified Apps

Single Apps + Websites

All Phones ▾

Countries/Reg... ▾

United States ▾

Apr 7 - May 4, ... ▾

Day

Week

Month

Downloads Revenue Usage Penetration Active Users Install Penetration Install Base Open Rate Retention D1 Retention D7 Retention D30 Avg Sessions / User

Avg Session Duration

Organic Downloads BETA

% Paid Downloads BETA % Organic Downloads BETA Cumulative Avg Ratings Cumulative Total Ratings Incremental Avg Ratings Incremental Total Ratings

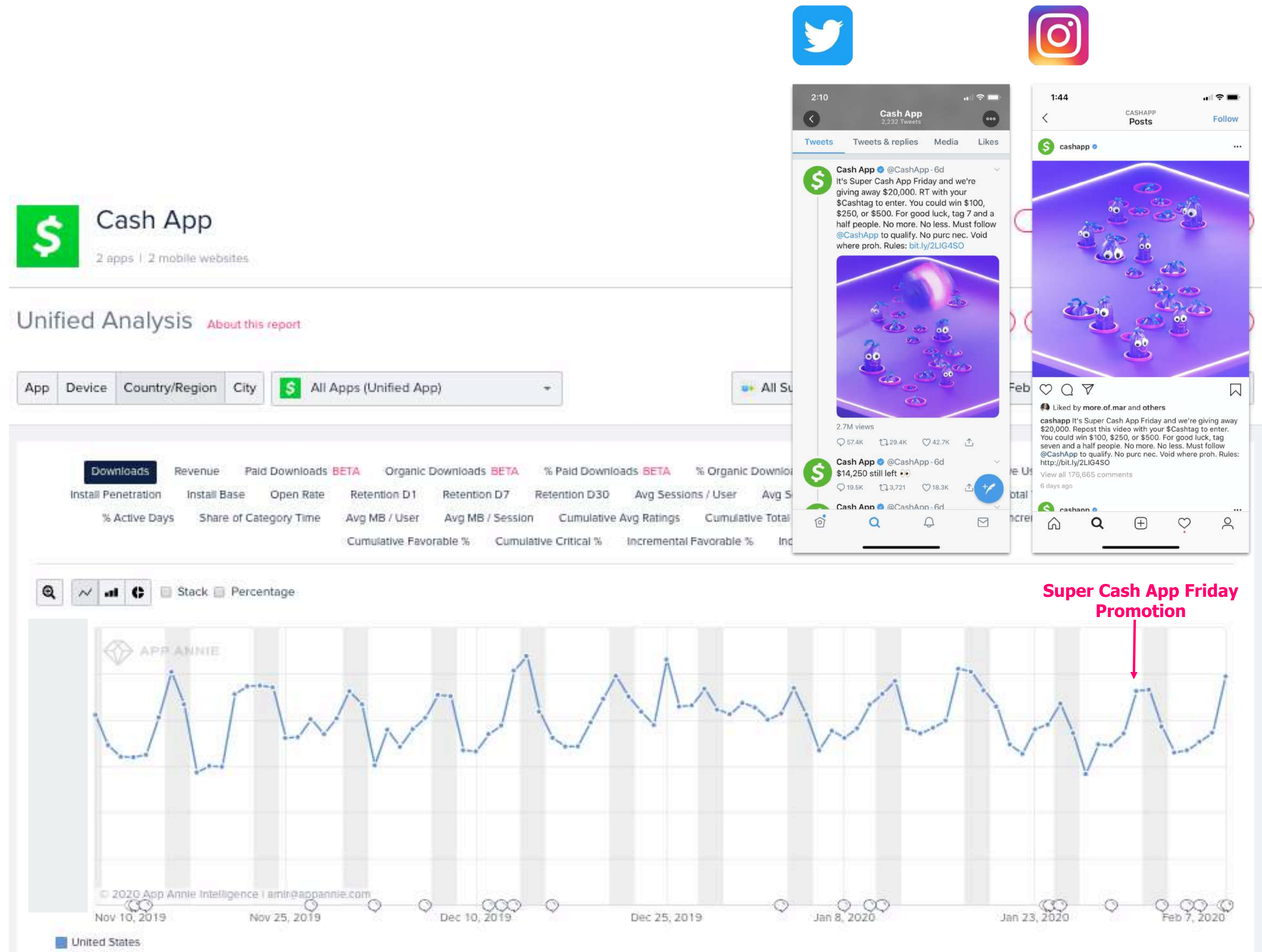
Cumulative Favorable % Cumulative Critical % Incremental Favorable % Incremental Critical %





## CASE STUDY 5: SOCIAL MEDIA MARKETING

# Leverage Social Media Giveaways to Drive Awareness and Downloads





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App Annie Intelligence is cited in IPOs, earnings reports, as well as by leading media and analysts. Over 1,100 companies rely on App Annie data to win in mobile.



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# Looking for More Mobile Insights?

- State of Mobile 2020 Report: [bit.ly/SOM2020MMA](https://bit.ly/SOM2020MMA)
- ASO Playbook: [bit.ly/ASOPlaybookMMA](https://bit.ly/ASOPlaybookMMA)
- User Acquisition Playbook: [bit.ly/UAPlaybookMMA](https://bit.ly/UAPlaybookMMA)



# Thank You

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