

Mobile Life After Lockdown

Forecasting Post-COVID Mobile App
Category Engagement Trends



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Mobile Life After Lockdown: Forecasting the Future

As lockdown restrictions begin to ease in parts of the United States, the mobile app ecosystem is poised for a seismic shift. Data from the global programmatic ecosystem indicates this change will be on par with the skyrocketing engagement levels that occurred when people all over the world came to suddenly rely on their mobile devices to cope with life in quarantine.

The impact of initial lockdowns on specific app categories, however, varied widely, and the impending easing of restrictions will have equally diverse effects. Much like initial lockdowns, it will mean massive spikes in organic acquisition and engagement for

some categories while others could see their daily user counts, and revenue, plummet.

To help app marketers prepare, MOLOCO has analyzed over 100 million bid requests from multiple app store categories across the mobile programmatic ecosystem. By using bid requests as a proxy for mobile app engagement where appropriate, this report provides actionable forecasts that publishers can use to plan for the effects that lifted lockdowns will have on their mobile app businesses.

Here's what we learned:



Dating apps will be among the fastest to bounce back once lockdowns lift and will return to levels well above those seen pre-lockdown. Data suggests a **235%** increase in engagement levels over those seen during lockdown.



Dining apps can expect a similar lift, with historical data suggesting an increase of as much as **486%** over the flatlined engagement levels seen during lockdown. They are not, however, likely to return to the same levels seen prior to lockdown for some time.



Travel apps will be the slowest to bounce back, and may very well take years to recover. Historical data shows continued declines in engagement of as much as **40%** even as local lockdowns are lifted.



Games will likely retain the players they acquired as a result of the **200-400%** increases in engagement during lockdowns, and do not show signs of dropping back to, or below, pre-lockdown levels.

Methodology



Bid request volume

This report analyzes **+100m bid requests** from the mobile programmatic advertising ecosystem across multiple app categories between the dates of January 1, 2020 and January 31, 2021. All data was collected via the **MOLOCO Cloud** automated mobile ad buying platform.



Category limitations

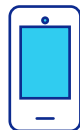
Analysis of bid request data was intentionally limited to app categories for which engagement with the programmatic ecosystem could be reasonably construed as a proxy for overall app engagement. This notably did not include the majority of ecommerce apps, and their exclusion from this report should not be considered indicative of stability within the category.

Scope of analysis

This report focuses largely on bid requests originating from Australia for the following reasons:



Australia's COVID lockdown timeline follows a relatively clear arc with milestones that can be reasonably compared to those occurring in other countries.



Australia's mobile app market conditions closely resemble those of other major geographic markets including the United States, Canada, and the United Kingdom.



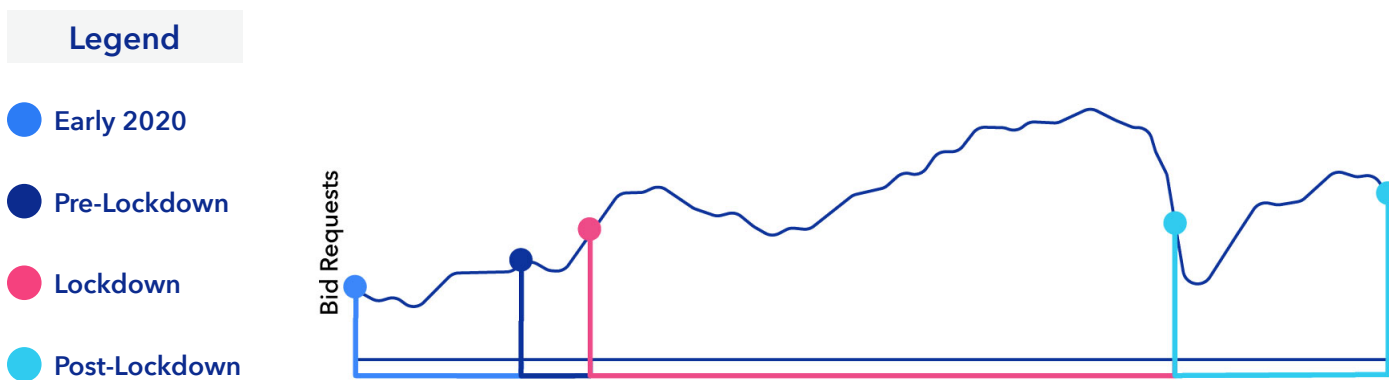
Bid request volume across all categories in Australia reached levels of statistical significance such that they could be analyzed with acceptable degrees of confidence in the trends they illustrated.

Measuring The Lockdown Effect

The impact of global lockdowns has been, in aggregate, largely beneficial to the mobile app publishing market. Bid request volumes followed seasonal norms in the early months of 2020, but once lockdown conditions began, the number of requests increased dramatically as quarantined mobile users sought out new ways to shop, connect, and be entertained while stuck at home. This led to dramatic increases in overall organic acquisition, IAP spending, and in-app ad revenue.

Looking specifically at overall bid request data from Australia, where lockdowns followed a cohesive albeit relatively accelerated timeline, we are afforded actionable insights into what the lifting of lockdowns could mean for other major markets with similar characteristics, including the United States, Canada, and the United Kingdom.

All Categories



	• Early 2020	• Pre-Lockdown	• Lockdown	• Post-Lockdown
Change In Average Bid Requests Per Day	(-)	+15%	+37%	-3%

This report divides bid request data into 4 discrete sections, each indicative of a unique set of market conditions that follow [the lockdown timeline in Australia](#):

● **Early 2020
(January to February)**

Bid request volumes align with seasonal averages from previous years. The pending pandemic has yet to impact mobile engagement levels.

● **Lockdown (April to October)**

Overall bid request volumes increase dramatically as stay-at-home orders are put in place. Engagement dips slightly from May to June before consistently trending up month after month, peaking in late October.

● **Pre-Lockdown (March)**

Mobile engagement levels see a small spike, possibly due to novel user behavior resulting from pre-empted stay-at-home restrictions. Some categories see increased engagement, but overall bid requests remain at seasonal norms.

● **Post-Lockdown
(November to January)**

Bid request volumes drop to pre-pandemic levels when lockdowns are gradually lifted in late October before trending up again for the normal seasonal holiday increase.

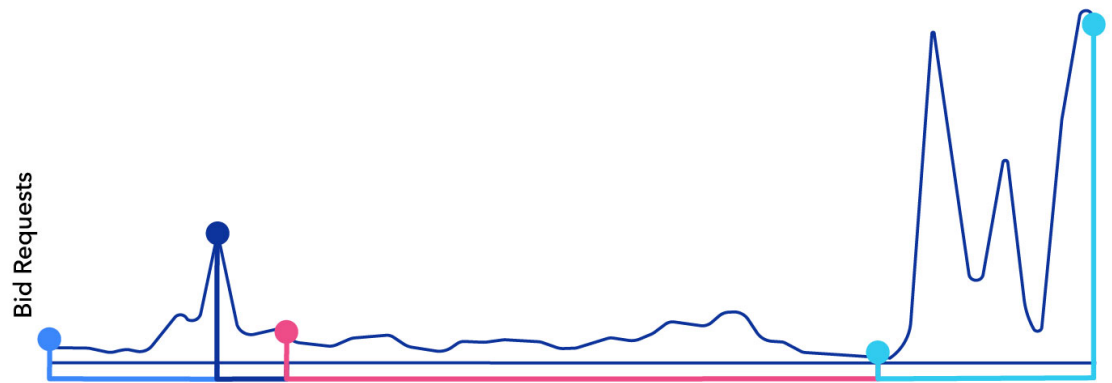
While the aggregated data across all categories tells a straightforward story – that lockdowns led to corresponding increases in mobile user engagement – each app category was impacted in a unique way, and not always for the better. Further analysis

found that each category followed its own unique trajectory based entirely on how their value proposition was affected by lockdowns. These findings are explored in the pages that follow.



Legend

- Early 2020
- Pre-Lockdown
- Lockdown
- Post-Lockdown



• Early 2020

• Pre-Lockdown

• Lockdown

• Post-Lockdown

Change In Average Bid Requests Per Day

(-)

+108%

-57%

+235%

Historical data from Australia's portion of the programmatic ecosystem strongly suggests that while dating apps were among some of the hardest hit by pandemic restrictions, they will also be among the fastest to bounce back from their lockdown lull. Not only that, pent up demand will drive engagement levels high above what they were pre-pandemic as users actively seek out human contact after a long and lonely quarantine.

• Early 2020

Bid request volumes align with seasonal averages. No obvious impact from the pending pandemic.

• Pre-Lockdown (+108%)

Bid requests within the dating category jump substantially in the days leading up to the announcement of stay-at-home orders, possibly telegraphing anticipation of lockdowns and an eagerness to connect while still possible.

• Lockdown (-57%)

Bid requests drop as engagement flattens and remains low throughout lockdown. Some activity remains, suggesting that some users still found value in connecting via mobile app.

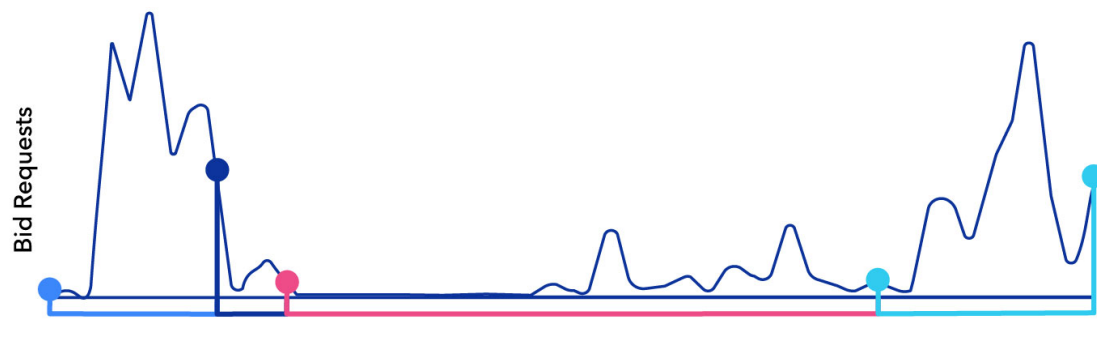
• Post-Lockdown (+235%)

The downward trend is immediately and powerfully reversed when lockdowns end. Engagement levels spike to well beyond pre-pandemic levels suggesting that dating apps will play a key role in helping mobile users rejoin the social landscape.



Legend

- Early 2020
- Pre-Lockdown
- Lockdown
- Post-Lockdown



• Early 2020

• Pre-Lockdown

• Lockdown

• Post-Lockdown

Change In Average Bid Requests Per Day

(-)

-78%

-80%

+486%

It's been widely reported that lockdowns more than doubled business for food delivery apps like Doordash and Postmates, but bid request data shows that in-person dining and restaurant apps saw a precipitous decline. It wasn't until later in the year that they started to see small spikes coinciding with a gradual easing of restrictions. They were again buoyed by the seasonal holiday lift, but did not return to pre-pandemic levels.

• Early 2020

Bid request volumes remain high coinciding with the Australian summer months of December to February.

• Pre-Lockdown (-78%)

Bid request volume sees a sharp decline as the season shifts to autumn and lockdown restrictions are rolled out.

• Lockdown (-80%)

Engagement flatlines for the first and most aggressive half of lockdown, with daily bid requests reaching unprecedented lows. Small spikes of activity occur as some restrictions are lifted starting in the latter half of the year.

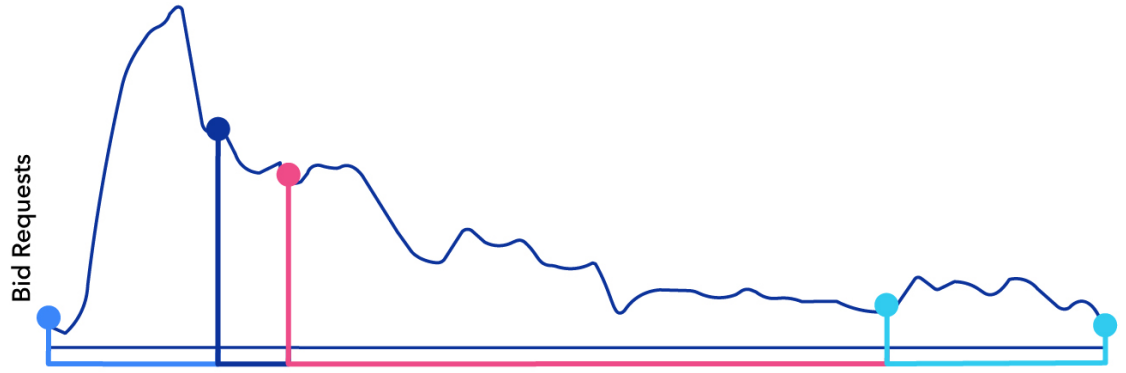
• Post-Lockdown (+486%)

Bid requests consistently increase in the last months of the year, carried by the momentum of lifted lockdowns and normal seasonal trends.



Legend

- Early 2020
- Pre-Lockdown
- Lockdown
- Post-Lockdown



	• Early 2020	• Pre-Lockdown	• Lockdown	• Post-Lockdown
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Change In Average Bid Requests Per Day

(-)

-38%

-49%

-43%

Travel apps endured a gradual but consistent drop in engagement over the course of lockdowns. What started with an Australian summertime seasonal high early in the year saw consistent declines heading into the autumn months of March to May. Bid request volumes were dragged down further by lockdown restrictions, reaching a low point in August, from which the category never fully recovered.

• **Early 2020**

Bid requests reached a seasonal peak in February at the height of Australian summer before starting to taper off at the start of March.

• **Pre-Lockdown (-38%)**

Engagement drops as lockdowns are rolled out and the summer season comes to an end.

• **Lockdown (-49%)**

Engagement gradually declines consistently from the beginning of lockdowns to the end.

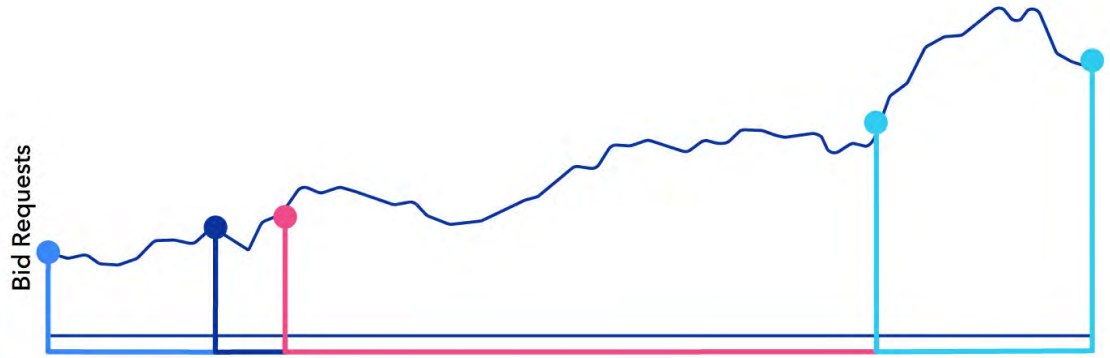
• **Post-Lockdown (-43%)**

Bid request volumes never fully recover even as Australia moves into the summer months.



Legend

- Early 2020
- Pre-Lockdown
- Lockdown
- Post-Lockdown



• Early 2020

• Pre-Lockdown

• Lockdown

• Post-Lockdown

Change In Average Bid Requests Per Day

(-)

+10%

+434%

+56%

The implementation of lockdowns catalyzed a relatively gradual but consistent increase in mobile game engagement as those stuck in quarantine sought out new ways of keeping themselves entertained. Even as lockdown restrictions were lifted, bid request volumes remained high as players continued to engage with the games they enjoyed during quarantine. The end of the year saw a seasonal lift likely due to the holiday season.

• Early 2020

Bid request volumes align with seasonal norms. No clear impact from the pandemic on engagement.

• Pre-Lockdown (+10%)

Engagement numbers remain at relative seasonal norms. It's not until lockdown restrictions are rolled out that bid request volumes start to trend up.

• Lockdown (+434%)

Engagement consistently increases monthly with the exception of a slight dip towards the middle of the year. Lockdown ends with mobile game engagement at nearly double what it was at the start of the year.

• Post-Lockdown (+56%)

Bid request volumes soar even as lockdowns lift. Seasonal engagement boosts are compounded by increased organic acquisition throughout the year, reaching unprecedented highs.



Prepare For a Mobile-First Future

While much of what's to come will still be unexpected, one thing is clear: the COVID pandemic has rapidly accelerated what many consider to be a **one-way march** towards a mobile-first future. Not only that, but it has irrevocably changed the ways in which we interact. With potential variant outbreaks on the horizon, app publishers of all categories will likely need to meet unprecedented challenges with creative solutions.

Whether your app falls into one of the categories analyzed or not, it would take something truly extraordinary to stop the post-lockdown mobile momentum observed across the programmatic ecosystem.

If you've been fortunate enough to benefit from the mobile engagement trends resulting from lockdowns, 2021 is the ideal

year to invest in retention and remarketing strategies to make the most of your newly acquired users.

As the world's leading automated mobile buying platform, MOLOCO Cloud provides everything mobile marketers need to bring their programmatic advertising efforts in-house and take advantage of the massive shifts in mobile engagement resulting from global lockdowns.

Through the power of automated bid optimization fuelled by our proprietary machine learning technology, MOLOCO offers publishers a proven path to achieving a positive return on programmatic ad spend, empowering them to meet the future of mobile marketing head on. Contact us to get started.

[CONTACT US](#)

About MOLOCO

MOLOCO is a programmatic advertising company that empowers mobile businesses to unleash the power of their data for fast, sustainable growth. Founded in 2013, the company offers a complete suite of proprietary advertising solutions to help mobile companies optimize the performance of their acquisition, retention and monetization efforts. MOLOCO Cloud is a top-rated real-time bidding platform that provides scale across more than 4 billion devices and enables marketers to take control of their programmatic advertising in-house. MOLOCO is headquartered in Silicon Valley, with offices in San Francisco, Seattle, London, Jakarta, Seoul, Singapore and Tokyo. For more information, [visit www.molocoads.com](http://www.molocoads.com).

