

2023

Mobile App Performance Marketing Global Report

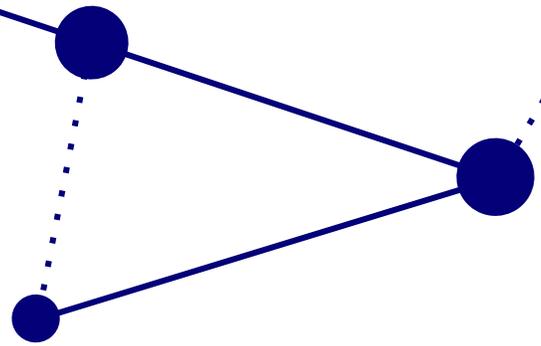
 MOLOCO + IPSOS

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Contents

- 03** [Overview](#)
- 08** [Investing in measurable outcomes](#)
- 17** [From reach to results](#)
- 28** [Machine learning: the future is now](#)
- 40** [Challenges & solutions](#)
- 43** [Appendix](#)

Overview



The shift towards mobile and performance marketing

With interest rates in the US hovering around 5.25% to 5.5% (Federal Reserve System, 2023), companies can no longer pursue growth at all costs. This shift particularly impacts marketers, who must optimize strategies to attract valuable users and reduce costs while maintaining ethical data practices — ongoing data management transparency and safeguards in user privacy, consent, and rights — and long-term user retention.

In response to this challenge, marketers are adopting data-driven solutions and prioritizing performance marketing, inspired by the success of big tech and advanced Machine Learning (ML) technology — this approach marks a shift away from traditional brand marketing. Mobile and performance marketing will become more important as marketing leaders are more accountable for business impact and Return On Advertising Spend (ROAS) than ever.

Federal Reserve System. (2023). Selected Interest Rates (Daily) - H.15. Retrieved from www.federalreserve.gov/releases/h15/

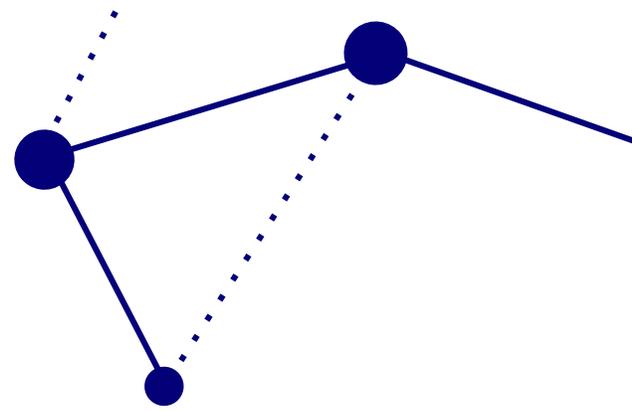
Mobile app marketers' best kept secrets

Moloco partnered with Ipsos, a leading independent market research and business consulting company, to determine marketers' expectations and trend patterns related to mobile app marketing.

1,675 marketing managers who directly oversee their company's mobile app marketing strategy were surveyed across nine countries: France (FR), Germany (DE), Indonesia (ID), Japan (JP), Singapore (SG), South Korea (KR), the United Kingdom (UK), the United States (US), and Vietnam (VN).

This survey encompassed a diverse array of industries including, but not limited to, gaming, e-commerce, messaging apps, entertainment, business, IT/solutions, and social/community platforms.

For most mobile app marketers, it's important to keep their marketing strategies and budgets to themselves; otherwise, competitors might learn their secrets to success. This global research study, however, shines a light on these important marketing initiatives.



01 | Key insight

Mobile app marketing continues to grow across industries and regions

In 2023, 64.7% of surveyed companies noted that they allocated a larger portion of their marketing budget to mobile ads, and 63.2% reported that they would be increasing their spending on performance marketing compared to their 2022 budget. This growth is noticeable for performance marketing in countries like Indonesia, the US, the UK, and industries beyond gaming, including e-commerce, IT/solutions, business, education, and finance, indicating widespread adoption.

- Companies continue to increase mobile app marketing budgets, evidenced by the average growth of 25.7% year-over-year in mobile ads spend.
- Indonesia, the UK, and France sustain strong growth in investment for mobile ads within mobile app marketing.
- E-commerce, gaming, and other top verticals stand out for their significant investment for performance marketing in mobile ads.
- Indonesia, the US, and the UK significantly invest more in performance marketing in mobile ads.

Read more: [Investing in measurable outcomes](#)

02 | Key insight

Performance marketing drives satisfaction and results

Performance marketing received a high satisfaction rating of 4.4 out of 5 from surveyed marketers. 58.2% of marketers indicated that they see performance marketing as an effective strategy for driving revenue growth. Over half (55.5%) of surveyed marketers view performance marketing as an important strategy to ensure profitability amid economic uncertainties.

- More companies are shifting towards performance marketing due to its effectiveness in driving revenue growth.
- Performance marketing remains critical for profitability during uncertain economic conditions.
- The trend of high satisfaction levels in performance marketing, driven by user acquisition and improved ROAS, extends to various industries.
- Current performance marketing strategies vary by region and industry, focusing on user acquisition or high-quality user engagement.

Read more: [Reach to results](#)

03 | Key insight

Advanced machine learning is top of mind for mobile app marketers

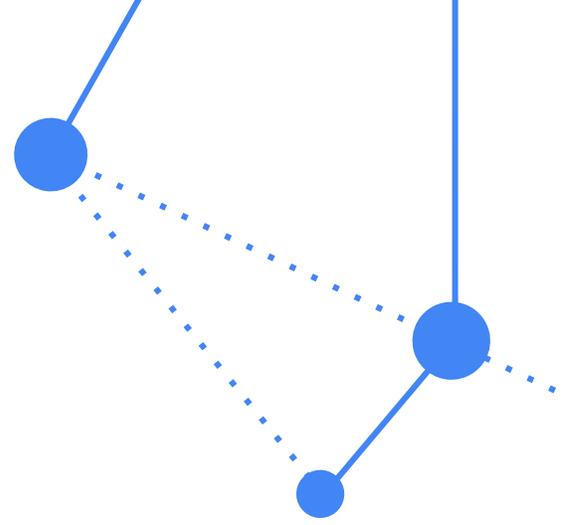
Advanced ML technology is the #1 factor in vetting a mobile app performance marketing solution. Surveyed companies within the report revealed a growing need for advanced ML technology for accurate decision-making and improving ROAS. Global marketers emphasized the importance of using advanced ML technology, seeing it as the secret to big tech's immense success and revenue growth in advertising.

- Machine learning plays a growing role in performance marketing in automatic targeting, enhancing ad optimization, and managing budgets.
- Mobile app marketers recognize the power of machine learning to refine strategies around Key Performance Indicators (KPI) like Average Revenue Per User (ARPU), Customer Acquisition Cost (CAC), Cost Per Action (CPA), Cost Per Click (CPC), and Cost Per Install (CPI).
- The role of machine learning in providing real-time, accurate decision-making for KPI monitoring has become more important.
- Machine learning data processing capabilities are critical in areas focused on real-time KPI monitoring, particularly for Germany and the gaming industry.

Read more: [Machine learning: the future is now](#)

Investing in measurable outcomes





Rise of performance-based marketing during times of economic uncertainty

As economic conditions evolve, the steady growth of mobile ads provides a reliable north star for mobile app marketers — compelling companies from various industries to redirect their marketing strategies toward mobile app marketing. Performance marketing is gaining prominence within this shift, underscoring the importance of measurable outcomes.

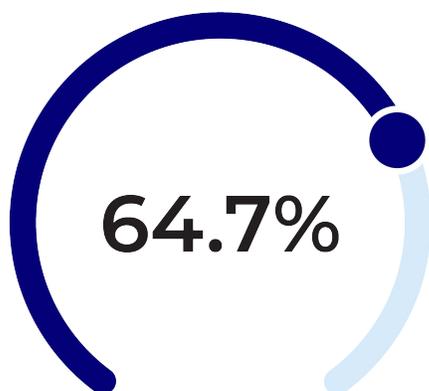
The driving force behind this trend is the potential that performance marketing holds in enhancing revenue and profitability. Notably, the global surge in investment in performance marketing coincides with mobile app marketing growth. This investment growth epitomizes the resilience and adaptability of companies, reflecting their proactive approach to adjusting to fluctuating market conditions.

Growing investment in mobile ads

The majority of surveyed companies (64.7%) indicated that they allocated a larger portion (%) of their marketing budget to mobile ads in 2023 — this represents significant year-over-year growth, with an average budget increase of 25.7%. And the growth spans diverse industries, including finance, IT/solutions, travel, and e-commerce. This trend is evident in many surveyed countries with a comparatively higher rate of increase in their mobile ads budget, indicating a worldwide shift toward mobile app marketing.

Companies in every country surveyed allocated more than half their marketing budgets to mobile ads: Japan was the lowest at 55% and Indonesia was the highest at 81.8%. And all countries were set to increase their budgets at over 20% year-over-year on average. This upward trend signifies an expanding investment in mobile app marketing, mirroring the global usage of mobile apps (Statista, 2023).

Overall, companies have increased their mobile advertising budget in 2023, compared to 2022



Companies that allocated a larger portion of their marketing budget to their mobile ads in 2023 vs. 2022

▲ +25.7%

Average increase in mobile ads budget in 2023

Base = 1,675, unit : %

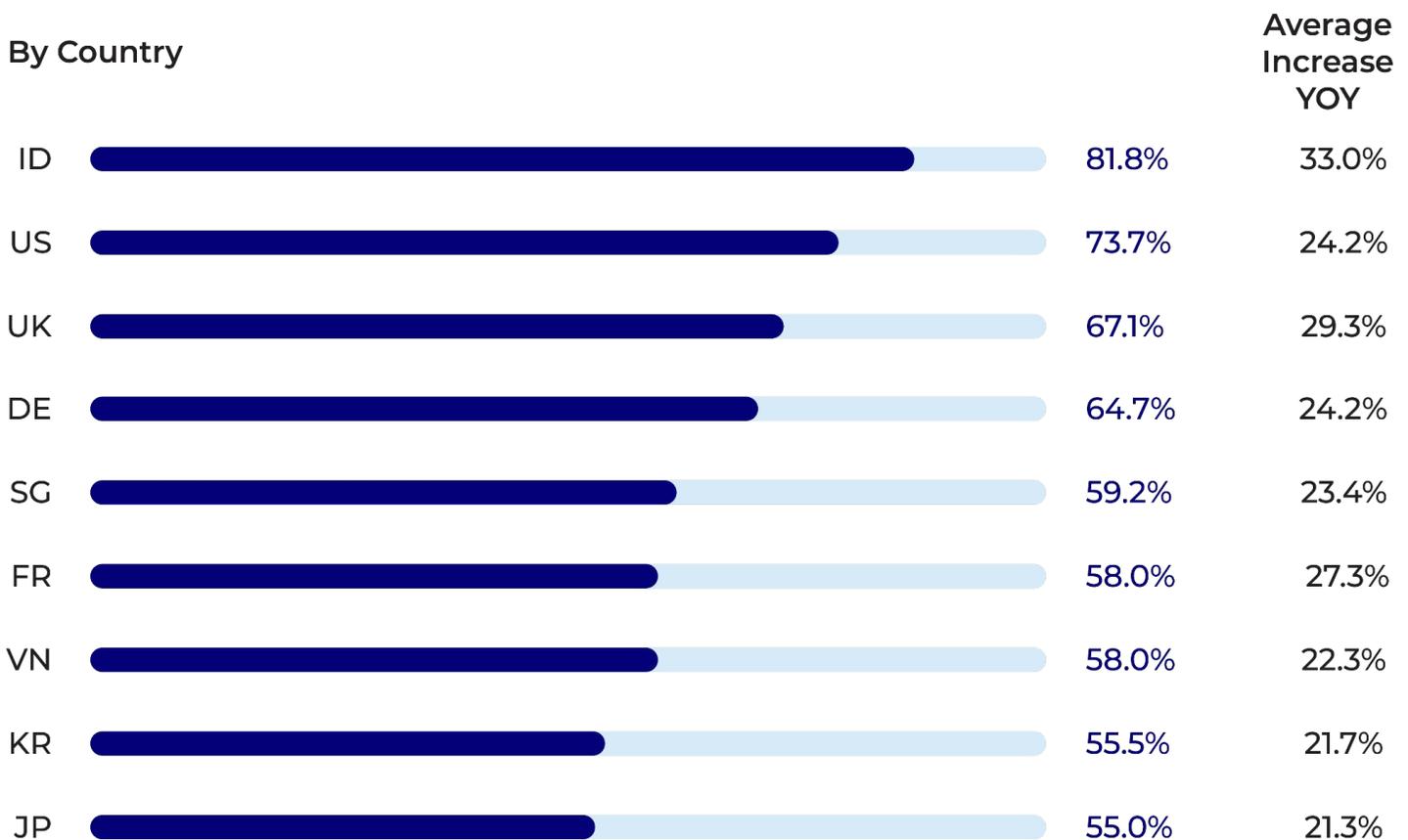
Survey questions: Out of your company's total marketing budget for 2023, has the share of the mobile ads budget increased or decreased in comparison to 2022? Approximately by what percentage has your company's mobile ads budget (out of the total marketing budget) increased in 2023 compared to 2022?

Statista. (2023). Mobile App Download Worldwide by Segment. Retrieved from www.statista.com/forecasts/1262881/mobile-app-download-worldwide-by-segment

Majority of companies globally reported that they plan to increase their mobile ads budgets in 2023

A remarkable trend swept the globe, with most companies experiencing a rise in their mobile ads budget. Indonesia, the UK, and France stand out among the countries surveyed, reporting the largest growth in their mobile ads spend. This pivotal shift towards mobile-focused marketing signals the onset of a new digital marketing era.

Companies' allocation in the marketing budget for mobile ads: 2023 vs. 2022 comparison



ID (n=154), US (n=300), UK (n=225), DE (n=190), SG (n=184), FR (n=207), VN (n=169), KR (n=146), JP (n=100)

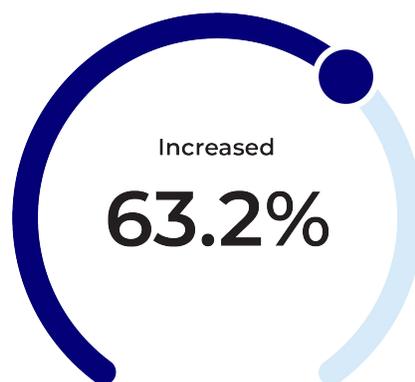
Survey questions: Out of your company's total marketing budget for 2023, has the share of the mobile ads budget increased or decreased in comparison to 2022? Approximately by what percentage has your company's mobile ads budget (out of the total marketing budget) increased in 2023 compared to 2022?

Increased investment in performance marketing

In 2023, 63.2% of surveyed companies reported that they increased the performance marketing portion of their overall mobile ads budget from 2022. This shift suggests a growing inclination among companies to invest more in performance marketing in response to the global rise in mobile usage. This upward trend is especially pronounced in Indonesia, where 83.1% of companies noted that they increased their performance marketing budget year-over-year.

Furthermore, this surge in performance marketing investment is evident across various industries. E-commerce (74.4%), IT/solutions (66.9%), business services (65.4%), education (65.3%), and finance (63.9%) emerged as the leading industries in increasing their performance marketing investment, moving beyond the traditional dominant gaming industry.

Overall, majority of companies have increased performance marketing spend in their mobile ads budget in 2023, compared to 2022



Companies that increased the performance marketing portion of their overall mobile ads budget in 2023 vs. 2022

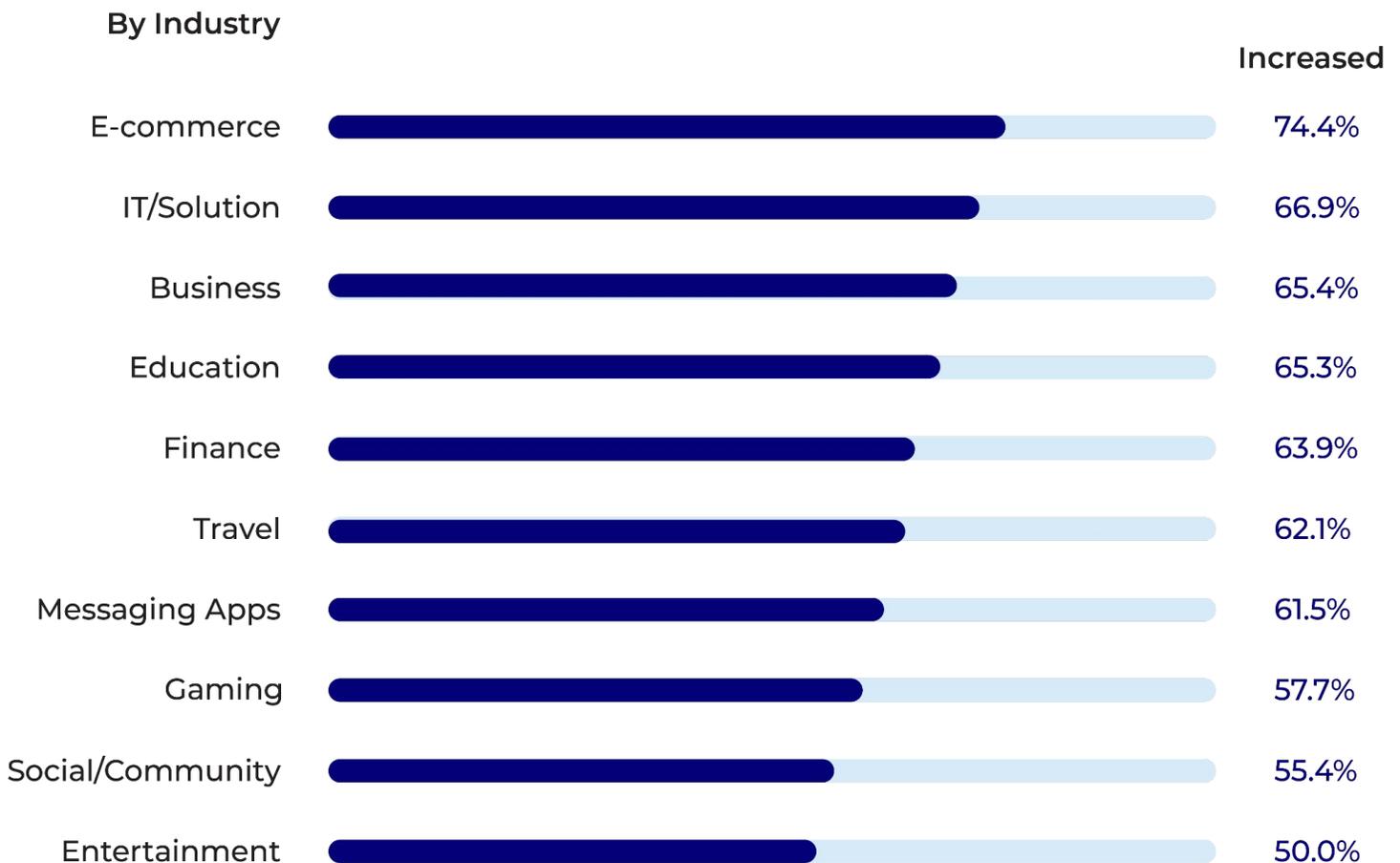
Base = 1,675, unit : %

Survey question: Has the share of the performance marketing budget increased or decreased in 2023 compared to 2022?

Companies in various industries reported that they increased the performance marketing portion of their overall mobile ads budget from 2022

An intriguing shift from brand to performance is happening as a vast number of companies in the e-commerce, IT/solutions, business, and education industry supercharge their performance marketing budgets. This approach underscores the evolving priorities and the value placed on measurable outcomes in today's competitive digital landscape.

Trend in performance marketing budget allocation from 2022 to 2023



E-commerce (n=328), IT/Solution (n=166), Business (n=127), Education (n=49), Finance (n=72), Travel (n=87), Messaging Apps (n=169), Gaming (n=274), Social/Community (n=101), Entertainment (n=122)

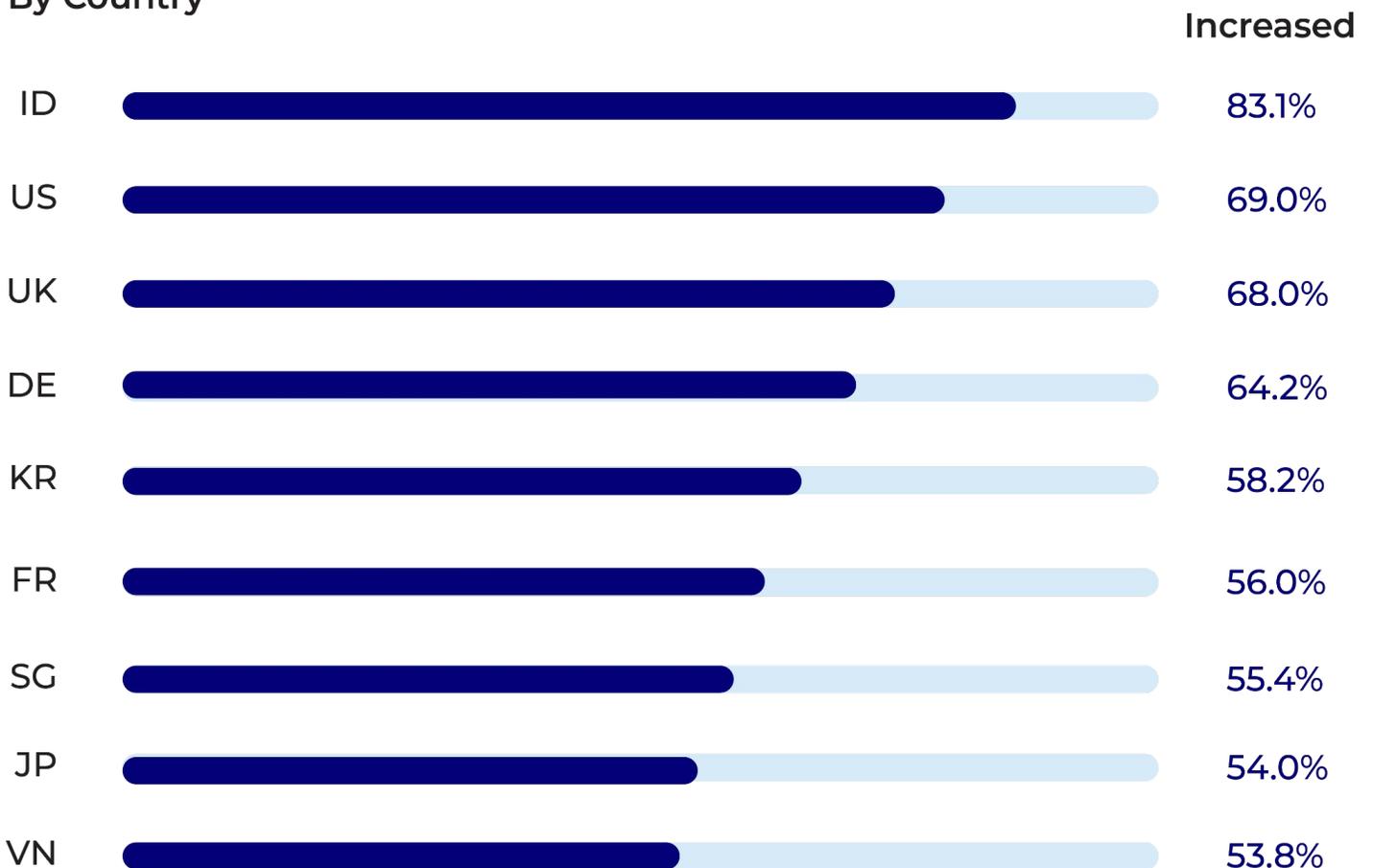
Survey question: Has the share of the performance marketing budget increased or decreased in 2023 compared to 2022?

Companies in different regions reported that they increased the performance marketing portion of their overall mobile ads budget from 2022

The increase in budget allocation across diverse regions highlights the significance of the impact of performance marketing. This trend mirrors the feedback from companies globally, signaling a collective push towards allocating more to performance marketing in their mobile ads budget from 2022.

Trend in performance marketing budget allocation from 2022 to 2023

By Country



ID (n=154), US (n=300), UK (n=225), DE (n=190), KR (n=146), FR (n=207), SG (n=184), JP (n=100), VN (n=169),
Survey question: Has the share of the performance marketing budget increased or decreased in 2023 compared to 2022?

Shifting tides from brand to performance marketing

The portion of the mobile ads budget for performance marketing saw a 2.8% growth year-over-year, reaching 45.7%. This indicates that performance marketing has taken precedence over brand marketing, which accounts for 41.1% of the mobile ads budget. The steady decline in brand marketing investment primarily stems from the perception that it lacks the effectiveness of performance marketing for driving more revenue growth (60%) and profitability (44%). Companies aiming to drive revenue growth and profitability immediately are increasingly leaning towards performance marketing in mobile app marketing.

Brand marketing might not show immediate results like performance marketing, but it plays a crucial role in building brand equity — ultimately contributing to revenue and profit. Its impact is typically seen over a more extended period and can be tricky to measure directly. As such, this unified trend toward performance marketing doesn't diminish the value of brand marketing; they're different and need different ways to measure success.

In 2023, companies allocated more to performance marketing than brand marketing within their mobile ads budget

Mobile Ads Budget Breakdown for 2023



Base= 1,675, Unit : %

Survey question: Out of your company's total mobile ads budget in 2023, what percentage does your company spend on the following types of marketing activities?

Brand marketing is not expected to have as strong an effect on revenue growth and profitability as performance marketing

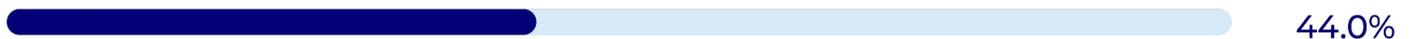
In the current macroeconomic environment, marketing leaders are emphasizing investments that ensure clear, profitable returns. Consequently, there's a noticeable move from brand marketing towards strategies centered on revenue growth and profitability. This shift reflects the evolving priorities in mobile app marketing.

Reasons for decrease in brand marketing budget: 2023 vs. 2022

We expect performance marketing will drive more revenue growth than brand marketing



We expect performance marketing will drive more profitability than brand marketing



Brand marketing is not effective during macroeconomic headwinds



Customer relationship-oriented marketing is not effective



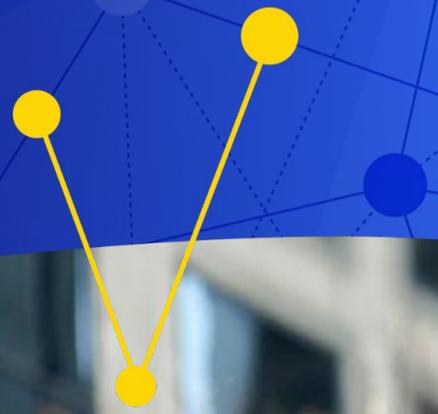
We were not satisfied with the results of brand marketing campaigns last year

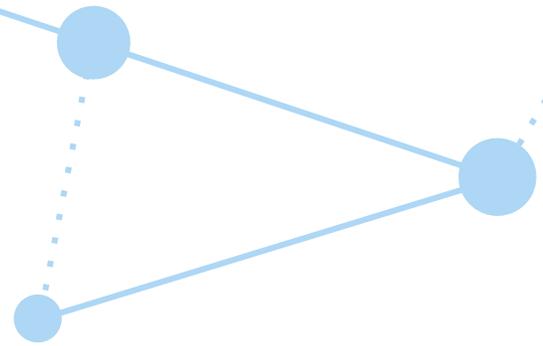


Base = 50, unit : %, Multiple Answers

Survey question: What are the reasons for your company's decrease in brand marketing budget in 2023 compared to 2022?

From reach to results

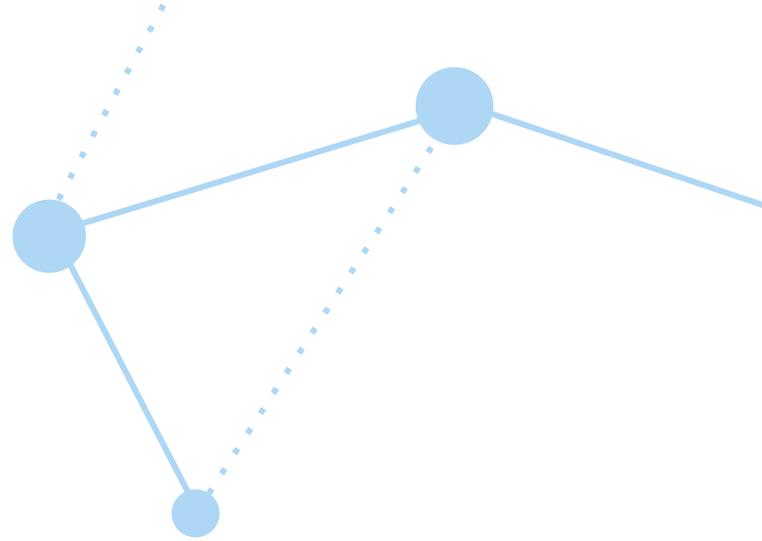




Driving performance-driven outcomes and a virtuous cycle in mobile app marketing

The move to performance marketing in the mobile app environment has triggered a surge in global investments as companies seek more profitable outcomes than those typically achieved with traditional brand marketing. This industry trend highlights the capacity of performance marketing to deliver tangible results and generate high satisfaction levels among mobile app marketers worldwide.

The real advantage of performance marketing lies in its potential to establish a virtuous cycle of success when implemented effectively.



Top reasons to invest more in performance marketing

Most mobile app marketers (58.2%) saw performance marketing as more effective for revenue growth than traditional brand marketing. A similar percentage (56.4%) were pleased with the concrete results of performance marketing in 2022, leading to increased investments. These straightforward measures of campaign impact, such as ROAS, are an additional draw, which 50.9% of companies acknowledged. This focus on profitability and the ability to measure and optimize performance helps explain why 55.5% of surveyed companies view performance marketing as a key tool to enhance profits during economic uncertainties.

The most salient reasons fueling the increase in performance marketing investment are:

- 01** Expectations of more revenue growth when compared with brand marketing
- 02** Satisfaction from past success in performance marketing outcomes
- 03** Profitability amid economic uncertainty

The primary reason companies increase their performance marketing budget is the expectation that it will increase revenue

Companies that have raised their performance marketing budget anticipate a subsequent increase in revenue growth and profitability. Driven by the goals of increasing revenue and satisfaction from past campaigns, the ability to measure performance significantly influences higher budget allocation to performance marketing.

Reasons for increase in performance marketing budget: 2023 vs. 2022

We expect performance marketing will drive more revenue growth than brand marketing



We were satisfied with the results of performance marketing campaigns last year



We want to invest in increasing profit during macroeconomic headwinds



Performance marketing campaigns are easy to measure (e.g. ROAS)



We expect performance marketing will drive more profitability than brand marketing



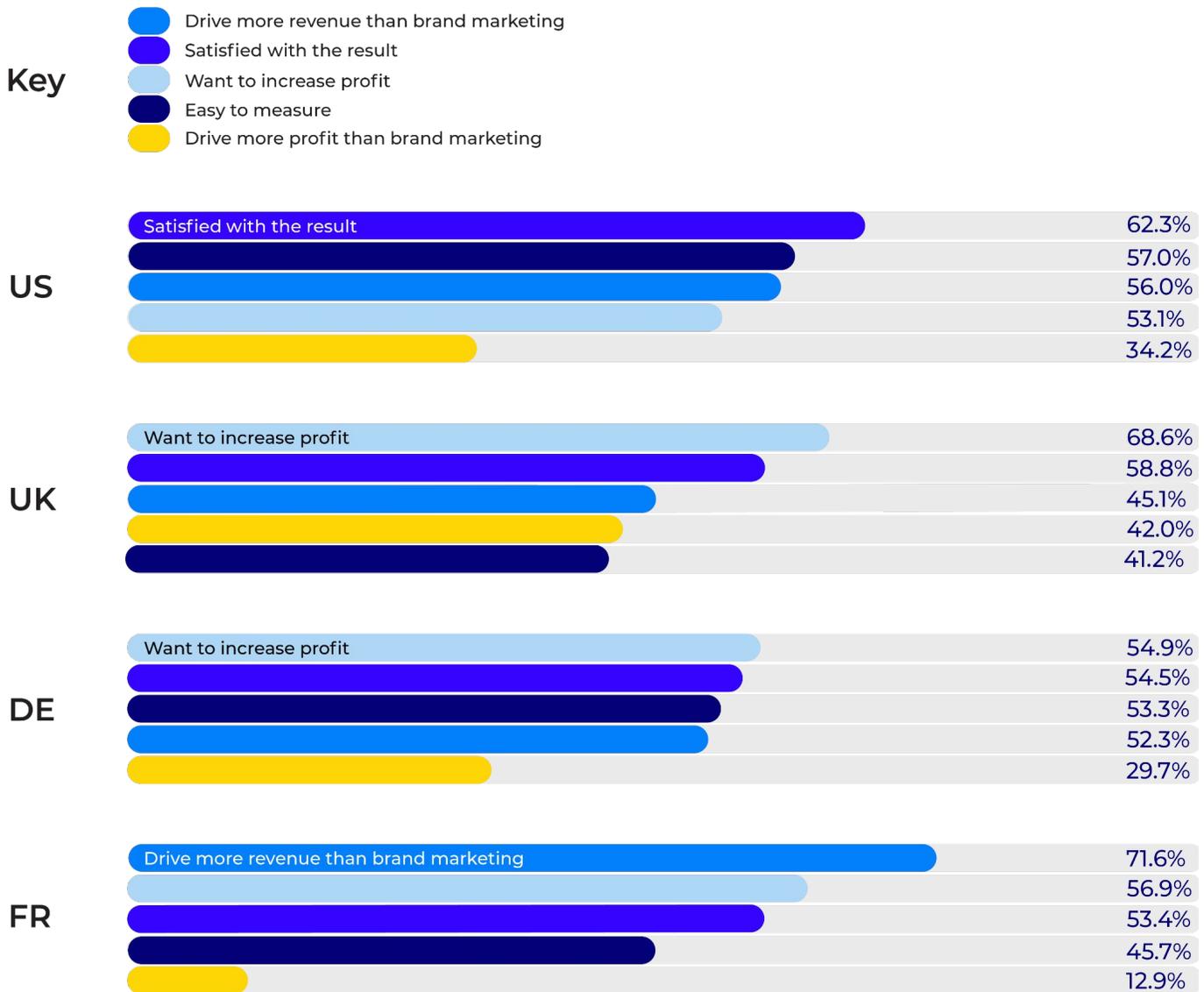
Base = 1,058, unit : %, Multiple Answers

Survey question: What are the reasons for your company's increase in performance marketing budget in 2023 compared to 2022?

Performance marketing investment grows worldwide for diverse reasons

Worldwide, companies reported diverse reasons for increasing their investment in performance marketing. Mobile app marketers share a commonality in increasing performance marketing budget in 2023 because it drives revenue growth, yields satisfying results, and enhances profitability in today's macroeconomic environment.

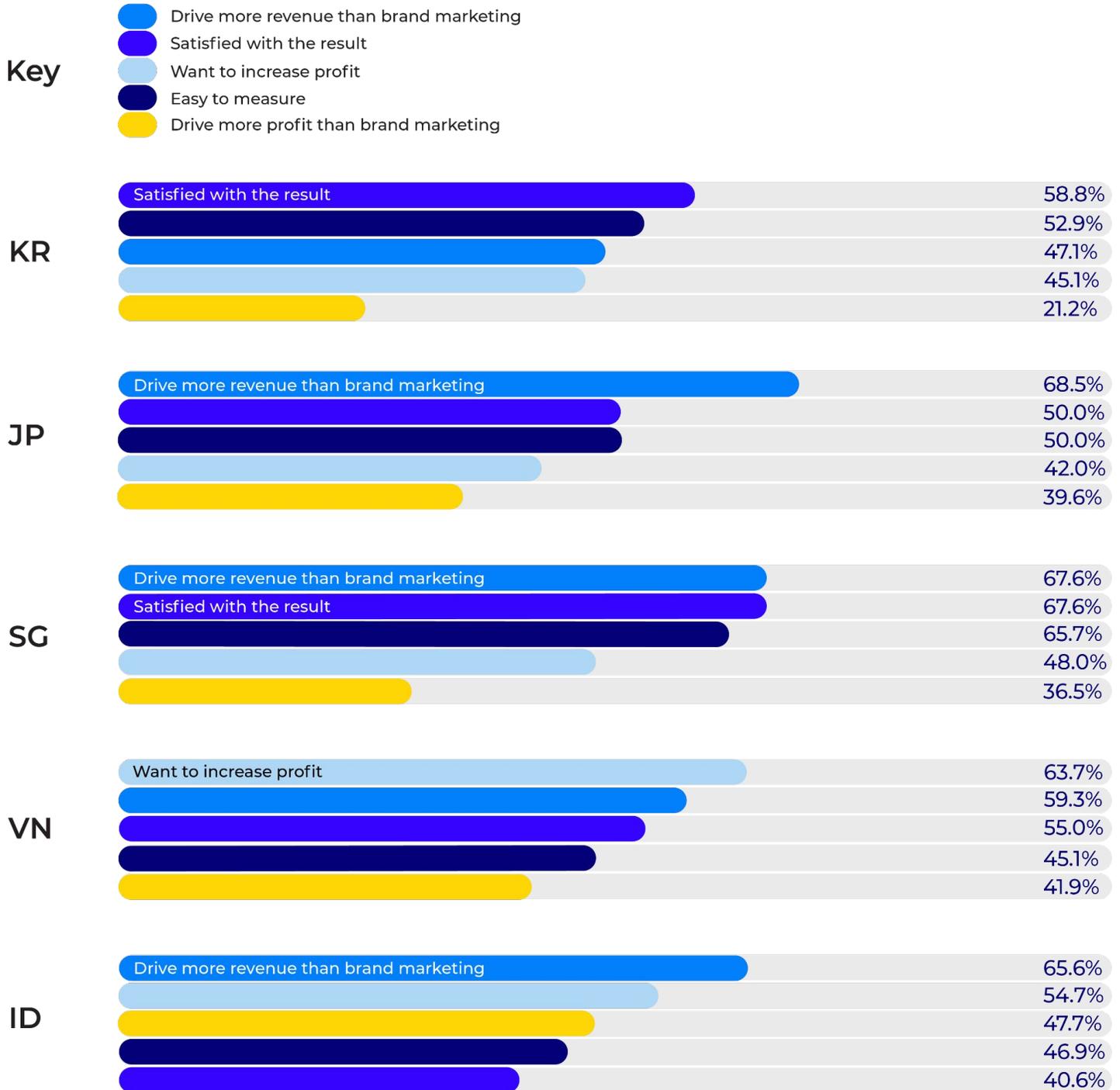
Reasons for performance marketing budget increase (By country)



US (n=207), UK (n=153), DE (n=122), FR (n=116), KR (n=85), JP (n=54), SG (n=102), VN (n=91), ID (n=128)

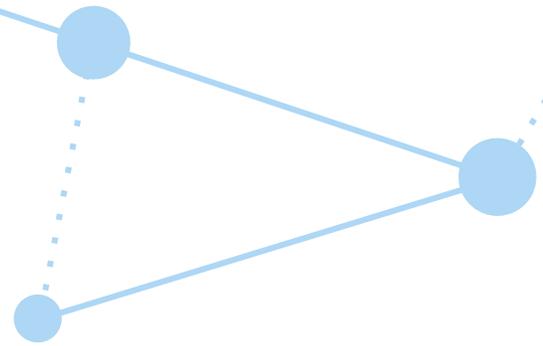
Survey question: What are the reasons for your company's increase in performance marketing budget in 2023 compared to 2022?

Reasons for performance marketing budget increase (By country) Continued



US (n=207), UK (n=153), DE (n=122), FR (n=116), KR (n=85), JP (n=54), SG (n=102), VN (n=91), ID (n=128)

Survey question: What are the reasons for your company's increase in performance marketing budget in 2023 compared to 2022?



High satisfaction with performance-driven marketing results

Mobile app marketers reported very high satisfaction levels with mobile app performance marketing, with an average score of 4.42 out of 5 among all respondents. While industries like gaming exhibit proficiency in this domain, high satisfaction is consistent across various industries regarding performance marketing. The three key factors attributed to high satisfaction:

- 01** Acquiring a substantial number of new users (40.9%)
- 02** Successfully obtaining high-quality users (24.2%)
- 03** Improving ROAS (12.0%)

In an uncertain economy, mobile app performance marketing provides a clear path for companies to optimize their performance, thus cementing its place in marketers' strategies.

Companies reported high satisfaction with mobile app performance marketing in 2022

Satisfaction Level (5-point scale mean)

4.42

5

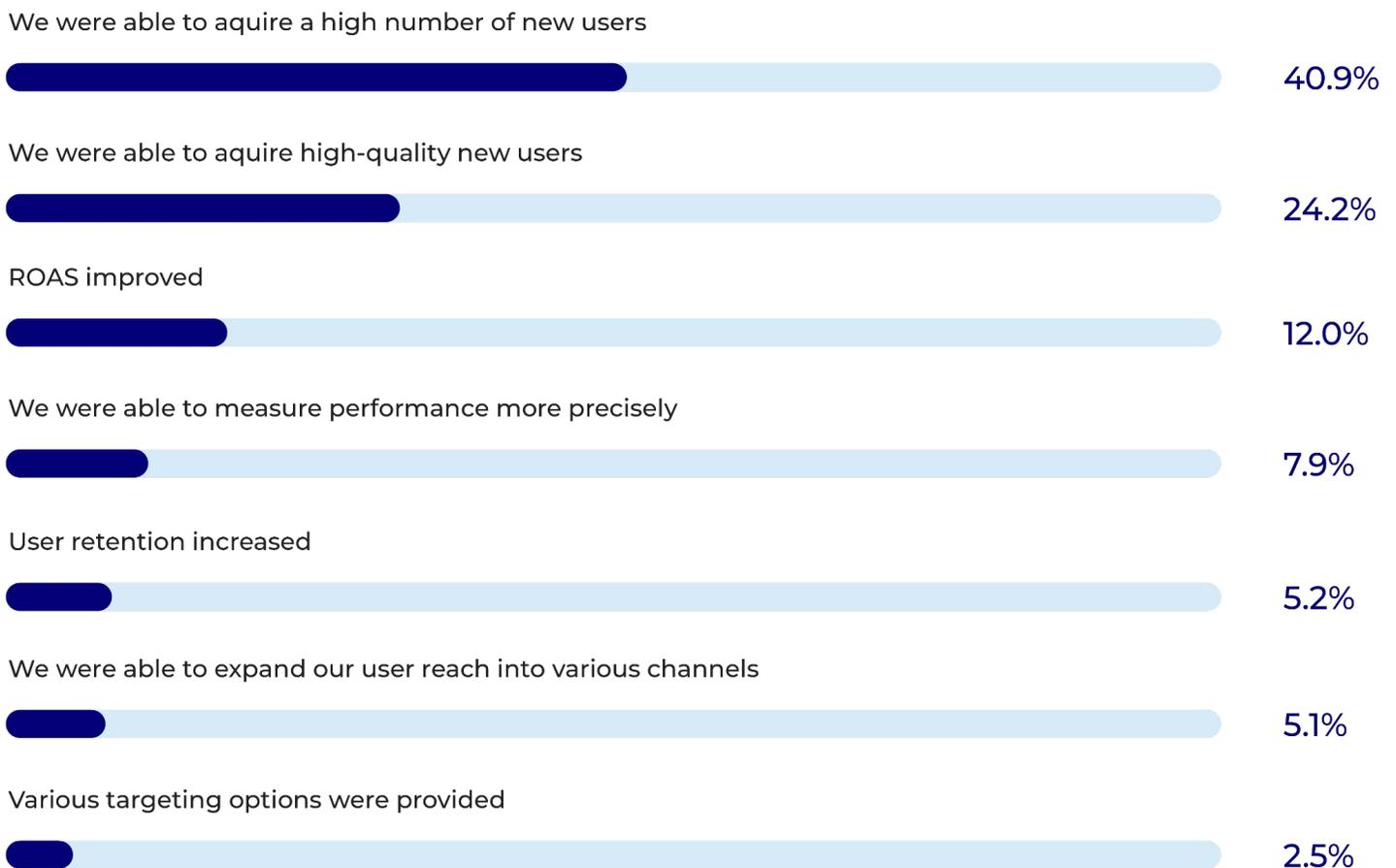
Base = 1,673, Unit : point

Survey question: Overall, how satisfied was your company with the mobile app performance marketing that was executed in 2022?

Mobile app marketers embrace performance marketing for clear, measurable user acquisition

Performance marketing sets the standard for acquiring a high number and high-quality new users while ensuring consistent and measurable results. This combination generates satisfaction among mobile app marketers. As a result, many are shifting their mobile app marketing to embrace its precise, data-driven approaches.

Reasons for being satisfied with mobile app performance marketing in 2022



Base = 1,503, unit : %

Survey question: Why was your company satisfied with the mobile app performance marketing that was executed in 2022?

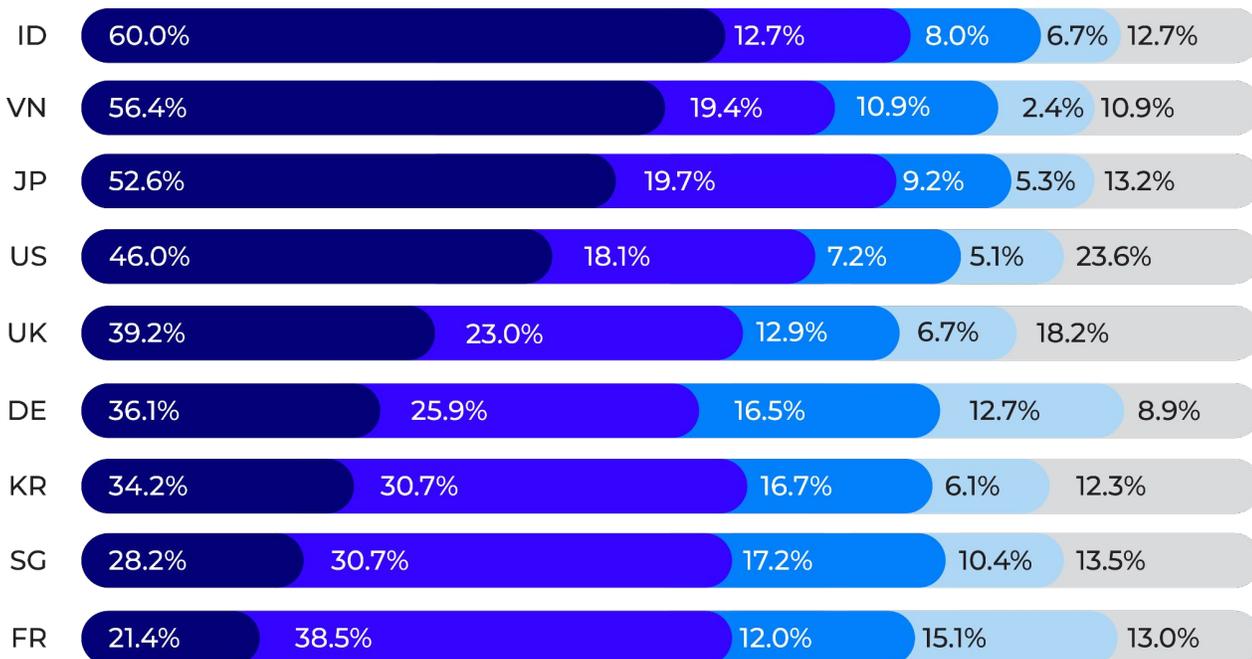
Companies express satisfaction with mobile app performance marketing because it has the potential to attract high-quality and high number of new users

Companies globally are singing the praises of performance marketing, noting that it not only meets but often surpasses their ambitious marketing goals in user acquisition.

Reasons for being satisfied with mobile app performance marketing in 2022

By Country

- We were able to acquire a high number of new users
- We were able to acquire high-quality new users
- ROAS Improved
- We were able to measure performance more precisely
- Other



ID (n=150), VN (n=165), JP (n=76), US (n=276), UK (n=209), DE (n=158), KR (n=114), SG (n=163), FR (n=192)
 Survey question: Why was your company satisfied with the mobile app performance marketing that was executed in 2022?

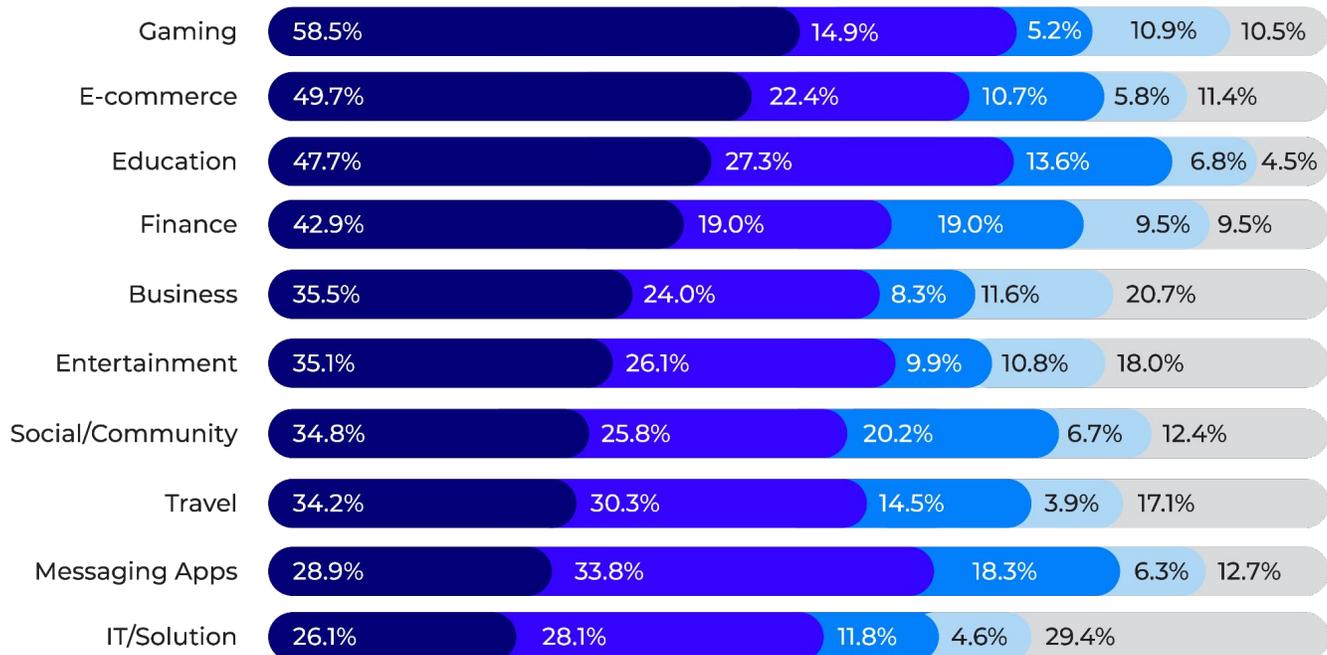
Performance marketing satisfies user acquisition goals, especially in gaming, e-commerce, and education

The gaming, e-commerce, and education industries also favor performance marketing, citing notable and successful results in user acquisition. Across the globe, the story is the same: tangible outcomes from performance marketing drive satisfaction among mobile app marketers.

Reasons for being satisfied with mobile app performance marketing in 2022

By Industry

- We were able to acquire a high number of new users
- We were able to acquire high-quality new users
- ROAS Improved
- We were able to measure performance more precisely
- Other



Gaming (n=248), E-commerce (n=388), Education (n=44), Finance (n=63), Business (n=121), Entertainment (n=111), Social/Community (n=89), Travel (n=76), Messaging Apps (n=142), IT/Solution (n=153),
 Survey question: Why was your company satisfied with the mobile app performance marketing that was executed in 2022?

On the rise

Performance marketing shifting the media landscape in Connected TV (CTV)

With this broader shift toward performance and outcomes-based marketing, advertisers are increasingly shifting their attention toward incremental channels such as Connected TV (CTV). In the digital media landscape, US linear TV ad spend is experiencing an 8.0% decline from 2022, while CTV ad spend is on the rise with 21.2% year-over-year growth (Insider Intelligence, 2023). This year, US CTV ad spend is projected to total \$25.09 billion, compared to linear TV with \$61.31 billion.

With the added data granularity and the ability to target, measure, and report on a one-to-one basis in CTV, the natural outcome is measurable performance and measurable outcomes on the big screen. This channel, formerly reserved for “top-of-funnel” marketing spend, has proven a powerful performance opportunity.

As the supply of CTV continues to expand, streamers will need to differentiate their offering to advertisers. A key tactic would be offering concrete ROAS. Over the past half-decade, marketers have poured billions of dollars into CTV with limited outcomes in justifying ROAS. When it comes to CTV, advertisers will increasingly demand strong and measurable returns on advertising spend.

Insider Intelligence. (2023). CTV Future: Don't Discount Linear in Your Media Mix. Retrieved from www.insiderintelligence.com/content/ctv-future-dont-discount-linear-your-media-mix.

Machine learning: the future is now



Using machine learning to tackle mobile app performance marketing challenges

In the ever-competitive digital landscape, mobile app marketers grapple with challenges like precise user targeting amid limited data, managing cost efficiency, and developing engaging ad creatives that maintain brand identity. Advanced ML is swiftly rising as a vital technology solution in performance marketing to address these issues.

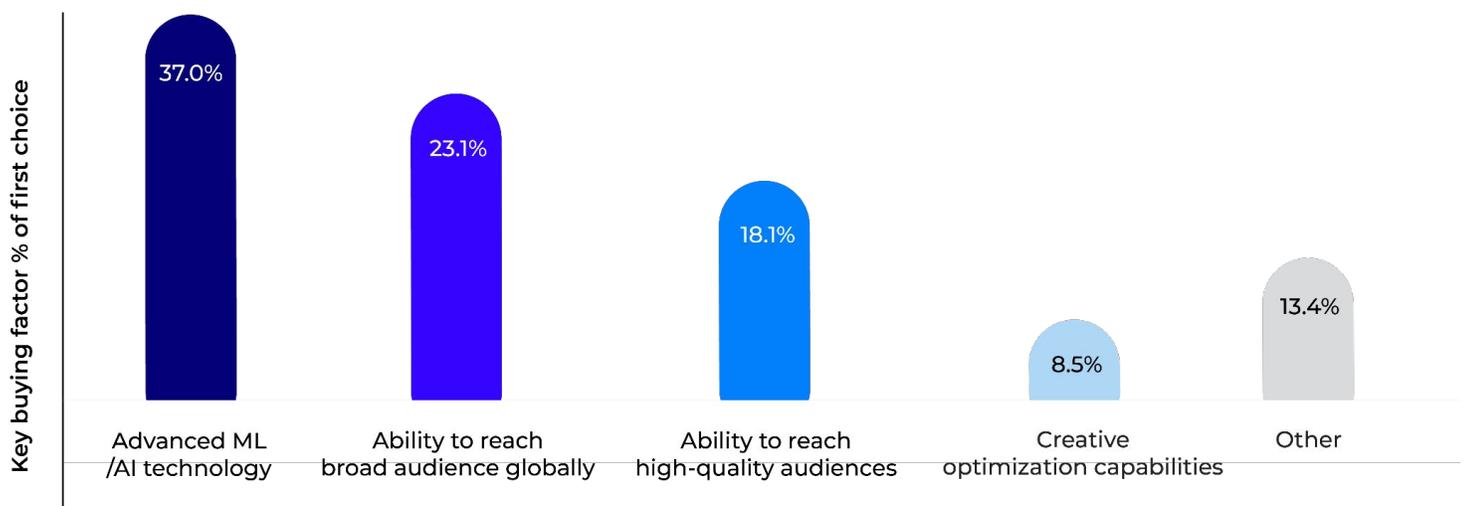
With its ability to analyze patterns and predict outcomes, ML enhances targeting accuracy even with sparse data and drives cost efficiency by automating decision-making. It also aids in creating impactful ad creatives by identifying elements that resonate with specific audiences. As such, leveraging advanced ML technology in performance marketing has become an essential strategy, rather than an option, for overcoming the challenges in mobile app marketing.

Machine learning is the key

Advanced ML technology is the top factor for mobile app marketers when selecting a performance marketing solution, ranking above global reach and high-quality user acquisition. Advanced ML can enable precise targeting, increased user engagement, and revenue growth while maintaining budget efficiency.

Its importance is globally acknowledged, with regions like Indonesia, Vietnam, and Japan valuing precise targeting. In contrast, France and Germany favor a wide, global user base. Industries such as gaming, e-commerce, and messaging apps prefer advanced ML solutions for targeted campaigns, while social, travel, and entertainment prefer global reach and user quality.

Advanced machine learning scores highest as the #1 factor when selecting a mobile app performance marketing solution



Mobile app performance marketing solution factors



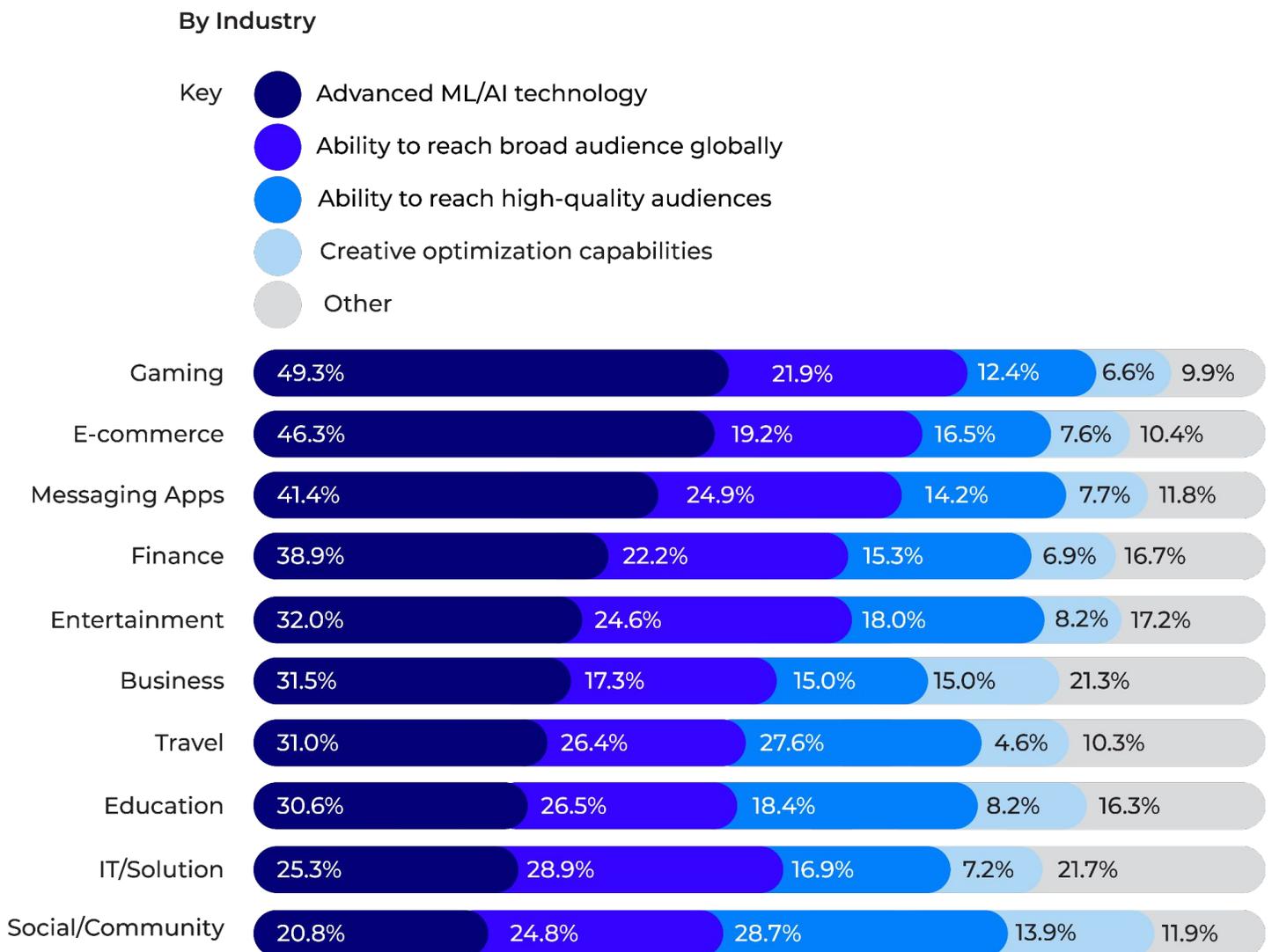
Base = 1,675, unit : %

Survey question: What are the important factors when your company is vetting a solution for mobile app performance marketing?

Companies in various industries prioritize ML/AI when choosing mobile app performance marketing solutions

The gaming and e-commerce industries utilize ML for precise targeting in mobile app performance marketing. In comparison, the social and entertainment industries focus more on acquiring a broad, global user base in their mobile marketing strategies.

Key factors in vetting a mobile app performance marketing solution



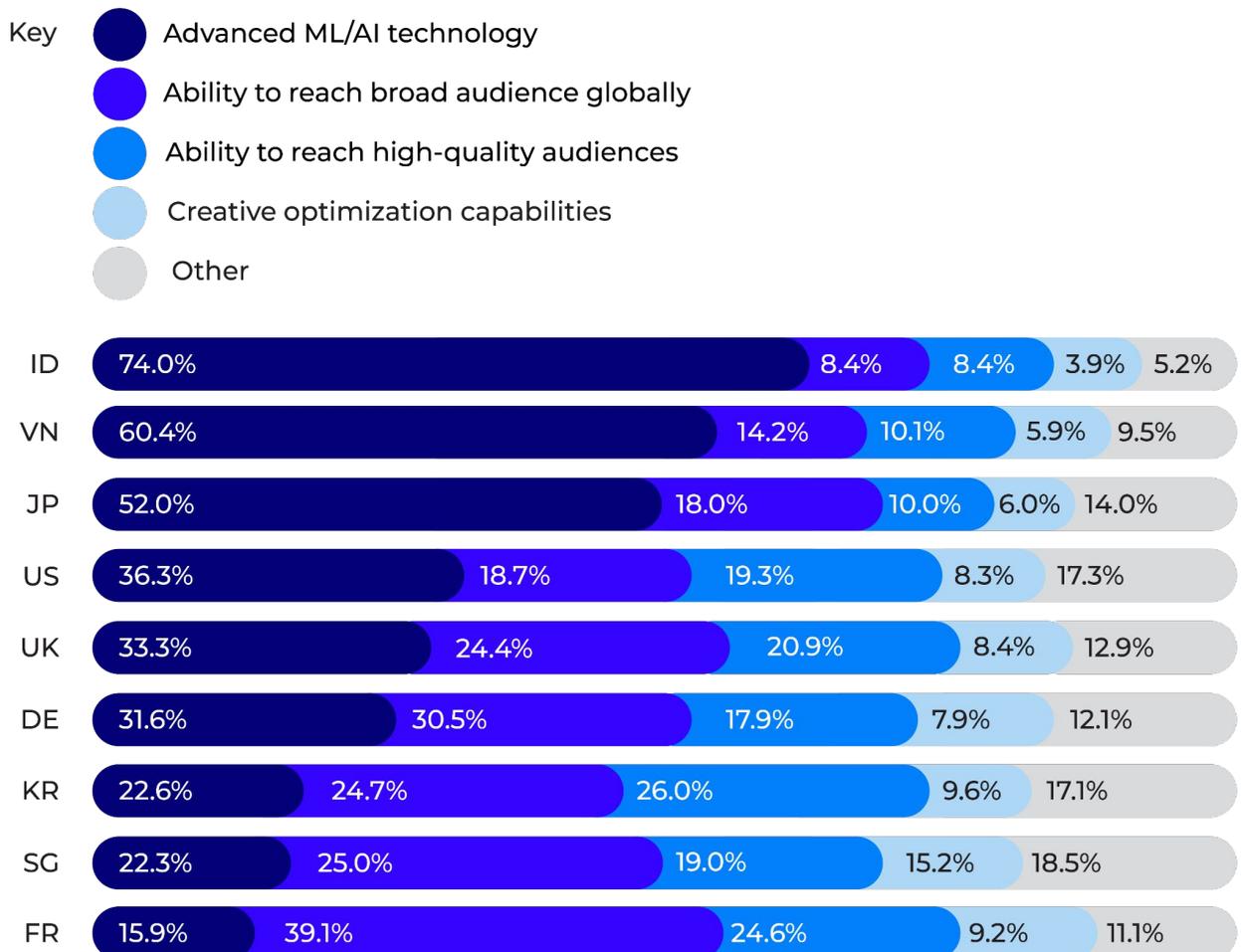
Gaming (n=274), E-commerce (n=328), Messaging Apps (n=169), Finance (n=72), Entertainment (n=122), Business (n=127), Travel (n=87), Education (n=49), IT/Solution (n=166), Social/Community (n=101)
 Survey question: What are the important factors when your company is vetting a solution for mobile app performance marketing?

Companies in various regions prioritize ML/AI when choosing mobile app performance marketing solutions

Indonesia, Vietnam, and Japan leverage ML for precise targeting in mobile app performance marketing. In contrast, France and Germany prioritize a broad, global user base in their mobile app marketing strategies.

Key factors in vetting a mobile app performance marketing solution

By Country



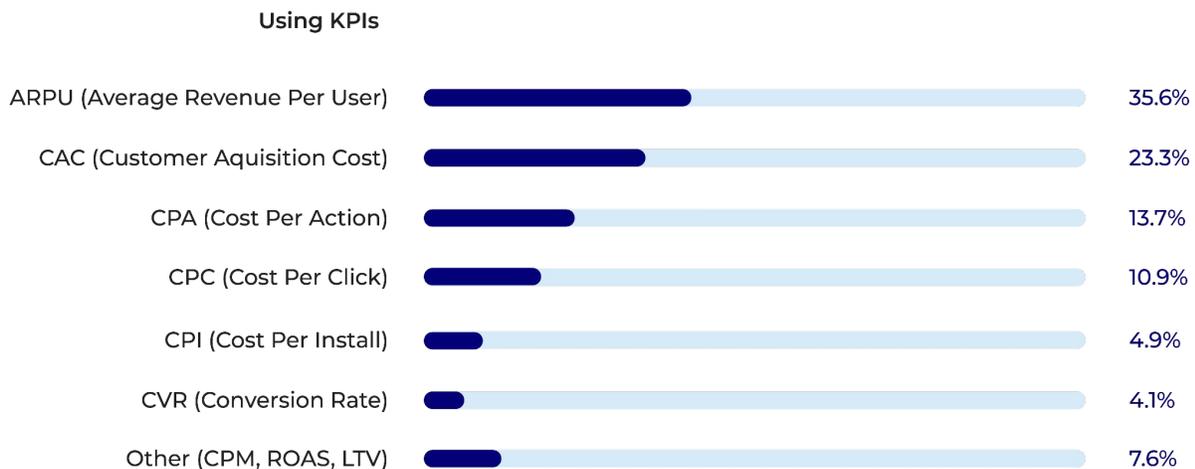
ID (n=154), VN (n=169), JP (n=100), US (n=300), UK (n=225), DE (n=190), KR (n=146), SG (n=184), FR (n=207)
Survey question: What are the important factors when your company is vetting a solution for mobile app performance marketing?

Top Key Performance Indicators (KPIs) for mobile app performance marketing

When assessing the effectiveness of mobile app performance marketing, mobile app marketers prioritize performance metrics like Average Revenue Per User (ARPU) at 35.6% and Customer Acquisition Cost (CAC) at 23.3%. These metrics highlight cost-effectiveness and emphasize ROAS. Other performance metrics such as Cost Per Action (CPA), Cost Per Click (CPC), and Cost Per Install (CPI) also play essential roles in measuring mobile app performance marketing outcomes but are prioritized less compared with ARPU and CAC.

Geographic and industry preferences vary, with ARPU being crucial in Japan, Vietnam, Indonesia, and industries like e-commerce, gaming, and finance. Meanwhile, France, Korea, and the social/community industry prioritize CAC and CPA. In this dynamic landscape, machine learning has become indispensable. ML technology can facilitate the accurate tracking and analysis of these metrics and optimizes marketing strategies in real-time, ensuring that companies remain agile and efficient in their campaigns.

First choice KPIs that companies use for mobile app performance marketing

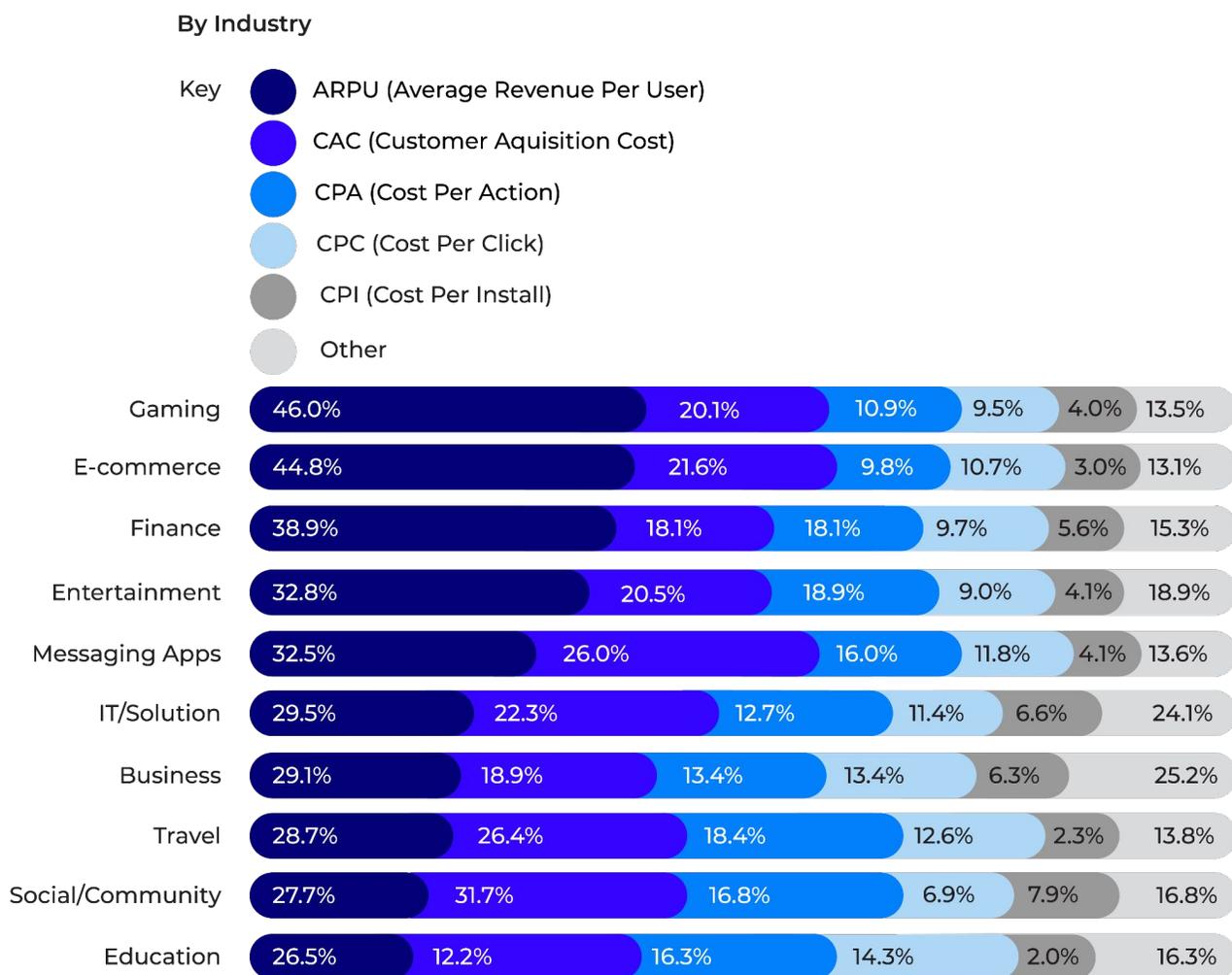


Base = 1,675, unit : %, Multiple Answers
Survey question: What performance metrics (KPIs) does your company use for mobile app performance marketing?

Across various industries, companies rely on specific KPIs for measuring mobile app performance marketing

In the e-commerce, gaming, and finance industries, ARPU stands out as the favored metric among mobile app marketers. ARPU provides a granular insight into the financial contribution of each user and provides the most helpful way to measure and determine profitability. By focusing on ARPU, these industries can identify high-value customer segments and refine their outreach for optimal returns.

First choice KPIs that companies use for mobile app performance marketing



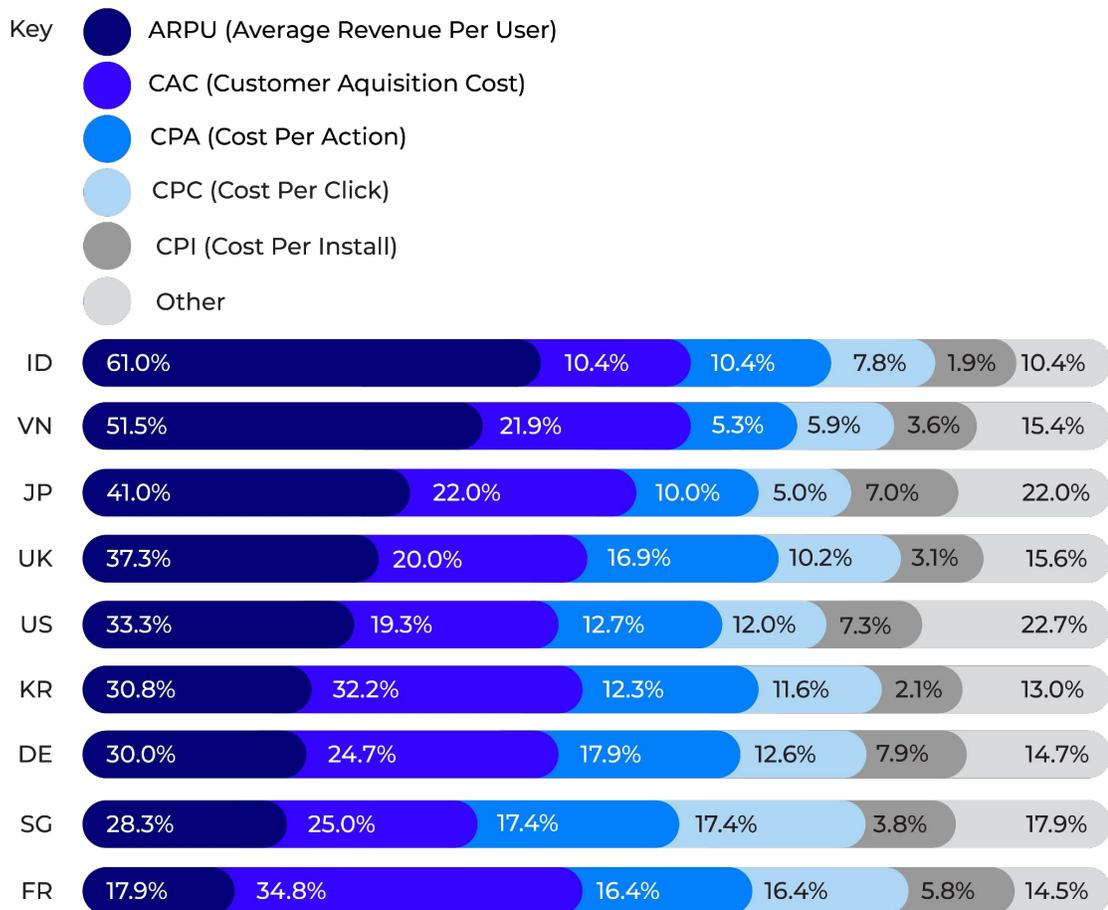
Gaming (n=274), E-commerce (n=328), Finance (n=72), Entertainment (n=122), Messaging Apps (n=169), IT/Solution (n=166), Business (n=127), Travel (n=87), Social/Community (n=101), Education (n=49)
 Survey question: What performance metrics (KPIs) does your company use for mobile app performance marketing?

Across different regions, companies rely on specific KPIs for measuring mobile app performance marketing

Japan, Vietnam, and Indonesia emphasize ARPU as a key performance metric, highlighting their focus on maximizing individual user revenue. Conversely, France and Korea prioritize CAC, indicating their concentration on the costs of gaining new customers. These choices underscore distinct marketing approaches across global markets.

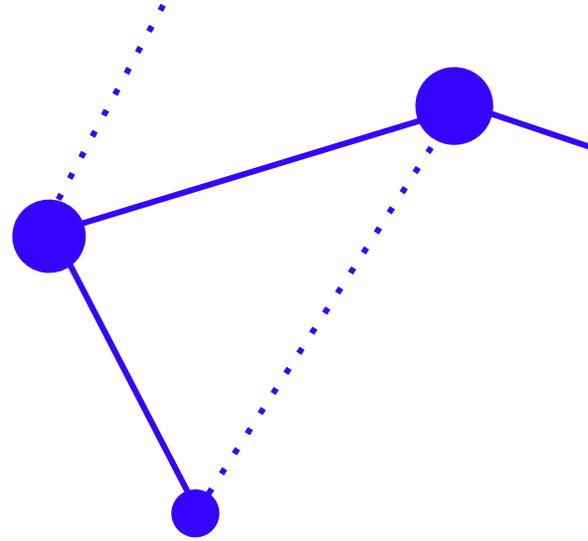
First choice KPIs that companies use for mobile app performance marketing

By Country



ID (n=154), VN (n=169), JP (n=100), UK (n=225), US (n=300), KR (n=146), DE (n=190), SG (n=184), FR (n=207)

Survey question: What performance metrics (KPIs) does your company use for mobile app performance marketing?



Machine learning is essential to provide real-time decision-making

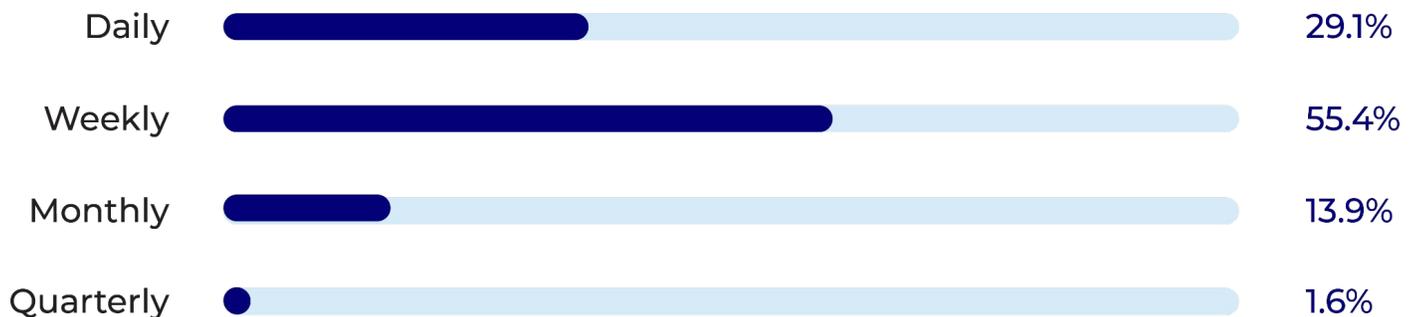
In the dynamic world of mobile app marketing, frequent monitoring of KPIs is vital to acquiring high-quality users. With 29.1% of mobile app marketers reported monitoring daily KPIs and 55.4% monitoring weekly, the focus on accuracy is evident, especially in Germany, with a high daily monitoring rate.

While the gaming industry shows high engagement, industries like finance and education prefer monthly checks. Companies value programmatic advertising platforms for their automated efficiency and targeted accuracy. And amid these diverse patterns, ML is essential to providing real-time, accurate decision-making to simplify monitoring and effectively engage users.

Gaming and e-commerce redefine speed with weekly and daily KPIs

The gaming and e-commerce industries stand out in the rapidly changing digital landscape — 94.9% of gaming and 88.1% of e-commerce companies have daily or weekly KPIs monitoring for mobile app marketing data performance. Advanced ML technology can influence these industries' daily and weekly budget management cycles and enables a faster response strategy, outpacing traditional marketing approaches.

Companies regularly check and optimize mobile app marketing performance data on a weekly basis



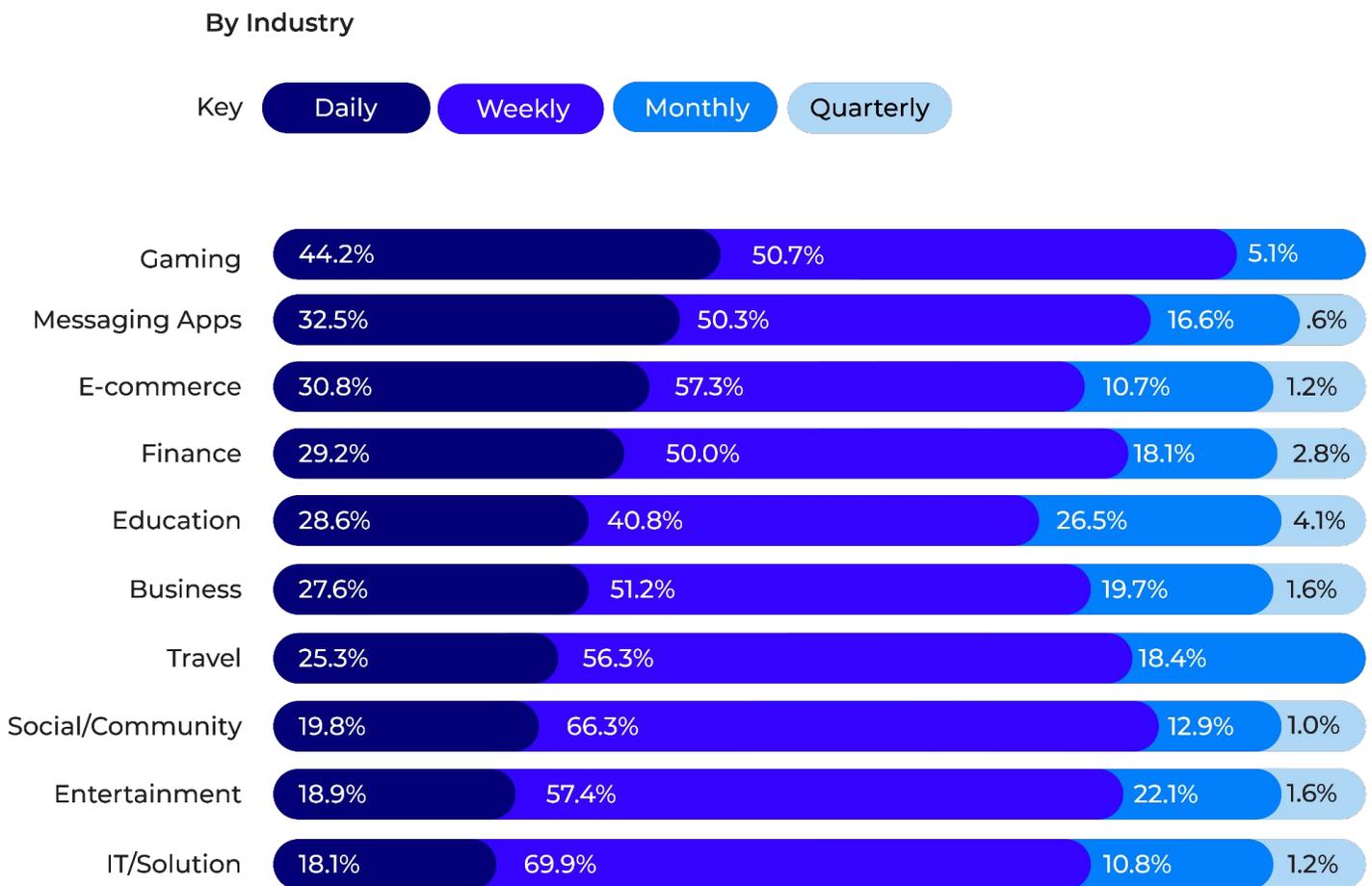
Base = 1,675, unit : %

Survey question: How frequently does your company check and optimize mobile app marketing performance data?

Across various industries, most companies monitor and enhance mobile app marketing performance data on a weekly or daily basis

Industries such as gaming and e-commerce, characterized by high user activity, routinely monitor performance on a daily or weekly basis. On the other hand, industries like finance and education tend to conduct monthly assessments, as they typically experience fewer unexpected shifts in user behavior and activity.

Frequency of mobile app marketing performance data monitoring



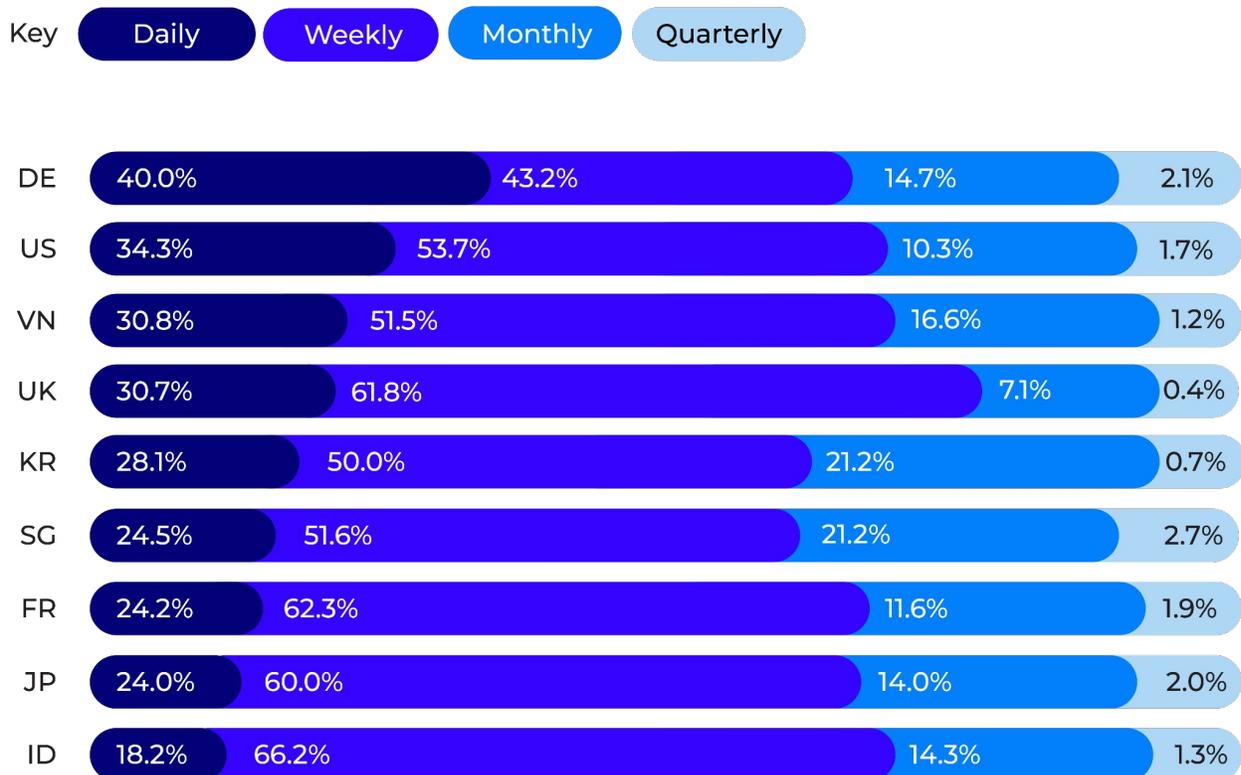
Gaming (n=274), Messaging Apps (n=169), E-commerce (n=328), Finance (n=72), Education (n=49), Business (n=127), Travel (n=87), Social/Community (n=101), Entertainment (n=122), IT/Solution (n=166)
Survey question: How frequently does your company check and optimize mobile app marketing performance data?

Across different regions, most companies monitor and enhance mobile app marketing performance data on a weekly or daily basis

Companies worldwide predominantly track performance weekly. Yet, companies in Germany, the US, and Vietnam also embrace daily monitoring, reflecting a shift in focus on real-time, data-driven decision-making.

Frequency of mobile app marketing performance data monitoring

By Country



DE (n=190), US (n=300), VN (n=169), UK (n=225), KR (n=146), SG (n=184), FR (n=207), JP (n=100), ID (n=154)
Survey question: How frequently does your company check and optimize mobile app marketing performance data?

Challenges & solutions



Overcoming challenges in mobile app performance marketing

Navigating the complexity of mobile app performance marketing involves more than just crafting captivating creatives and identifying the ideal media partners. The challenge is amplified in the current data-driven era of mobile app marketing, where marketers are tasked with intelligently optimizing creative content to strike a chord with their target users. Similarly, managing advertising budgets becomes a balancing act, with marketers worldwide striving to distribute resources judiciously across multiple campaigns and platforms.

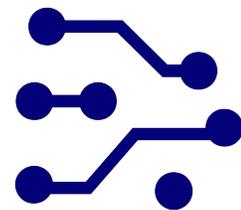
At the same time, mobile app marketers often face increasing challenges when advertising on the open internet. These concerns can undermine marketing initiatives, misallocate advertising budgets, and risk tarnishing brand reputation. Amidst these challenges, the power of performance marketing — fueled by advanced ML technology — emerges as a game-changer. Advanced ML technology can provide precise predictions across billions of parameters and daily bid requests in milliseconds, leveraging real-time, first-party data to adapt to changing consumer behavior and market trends. Consequently, it paves the way for accelerated user acquisition and accurate revenue measurement, offering a transformative solution to the complex landscape of mobile app performance marketing.



Accurate predictions



Immense scale



Real-time data

Unlocking the full potential of advanced machine learning for your mobile app performance marketing

For mobile app marketers considering advanced ML solutions, harnessing the right technology can drive significant growth and measurable outcomes. When vetting an ML solution, here are core questions to get the most out of your technology partner:

Does it prioritize real-time data integration?

Real-time data offers valuable insights into customer behavior, allowing marketers to adapt their strategies dynamically. Everything from user behavior to macroeconomic conditions can change constantly, requiring real-time data to solve real-time problems.

Does it provide granular insights?

Advanced ML can generate granular insights into user behavior. These insights can help marketers enhance their performance marketing goals and make informed decisions. So it's essential to demand insights and transparency in your ML solution.

Does it offer deep insights into its ML technology?

While ML promises significant advantages, not all ML solutions are created equal. Requesting detailed information when vetting a partner is essential, ensuring you fully grasp how their technology can support and align with your marketing goals.

Does it amplify business growth?

Beyond just targeting, the real value of a technology partner lies in its ability to drive measurable business outcomes. Approach with an open mindset, and continuously test and iterate to ensure your partner's solution yields genuine business results with advanced ML.



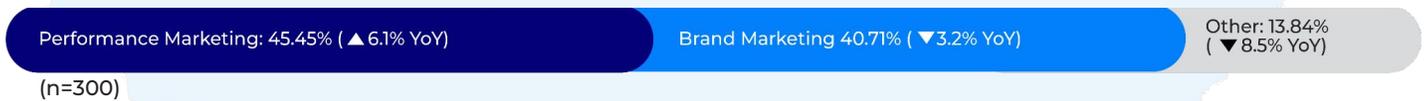
Appendix

United States

1. Out of your company's total marketing budget for 2023, has the share of the mobile ads budget increased or decreased in comparison to 2022?



2. Out of your company's total mobile ads budget in 2023, what percentage does your company spend on the following types of marketing activities?



3. Macroeconomic reason for increase in performance marketing budget: 2023 vs. 2022
We want to invest in increasing profit during macroeconomic headwinds.

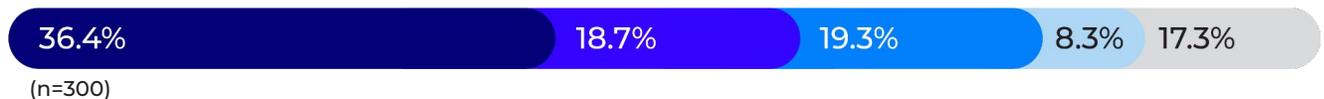


4. Overall, how satisfied was your company with the mobile app performance marketing that was executed in 2022?



5. What are the important factors when your company is vetting a solution for mobile app performance marketing?

- Key Advanced ML/AI technology
- Ability to reach broad audience globally
- Ability to reach high-quality audiences
- Creative optimization capabilities
- Other

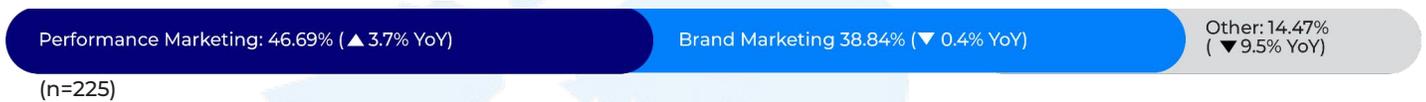


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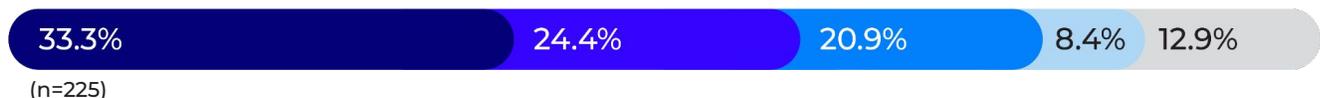


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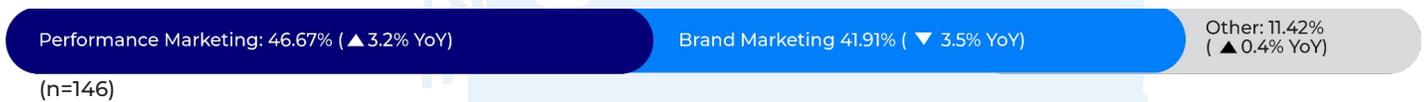


South Korea

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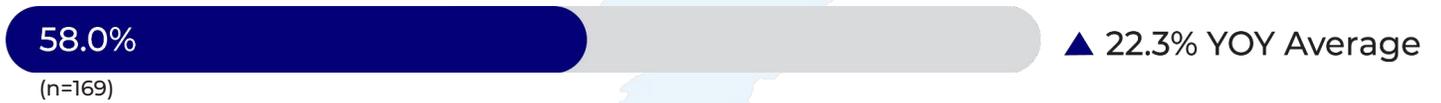
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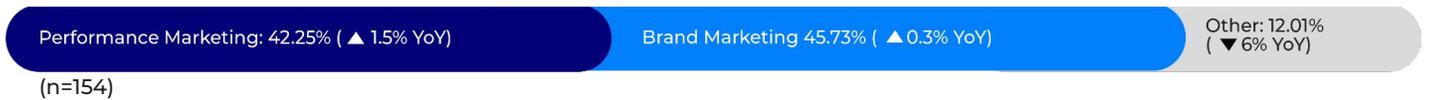


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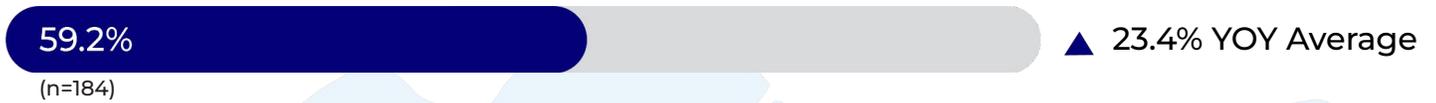
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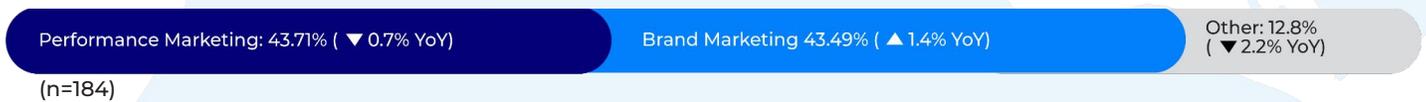


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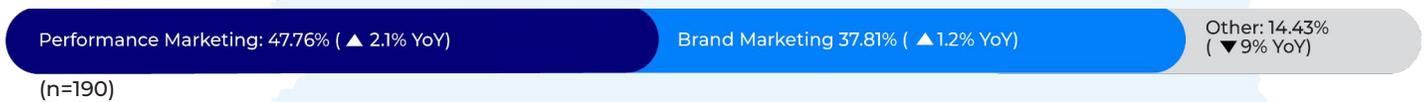


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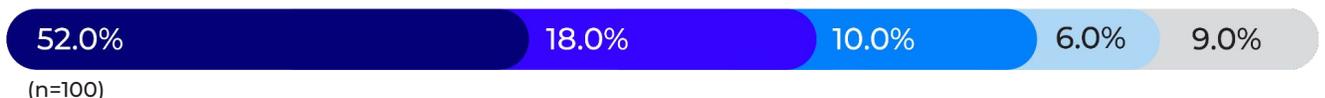


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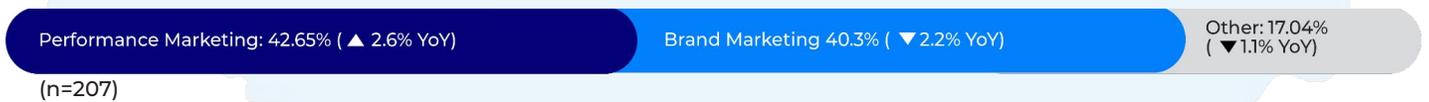


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About Ipsos and methodology

About Ipsos

[Ipsos](#) is an industry leader in providing dependable data and insights about society, markets, and individuals. Ipsos offers valuable insights into the perceptions and experiences of citizens, consumers, patients, customers, and employees using surveys, polls, social media, and qualitative research data.

Methodology

Moloco partnered with Ipsos to conduct an online survey targeting mobile app performance marketers in nine countries between April 3-May 1, 2023. The survey consisted of multiple-choice designed to gather detailed insights. Care was taken in question design to minimize bias and ambiguity, and all responses were anonymized to encourage honesty.

- A sample of 1,675 marketers working at companies owning mobile apps and managers at marketing agencies from the US (300), the UK (225), Germany (190), France (207), Korea (146), Japan (100), Singapore (184), Vietnam (169), and Indonesia (154) across various industries.
- The survey only featured marketers directly involved in mobile app marketing budget execution and responsible for their company's performance marketing.

The survey was conducted online to facilitate rapid response collection and processing. Respondents received a comprehensive privacy policy, ensuring their data was handled securely and ethically.

Ipsos utilized advanced data analysis techniques to process the survey responses. The analysis was aimed at providing actionable insights to help enhance mobile app marketing strategies. It is important to note that online non-probability polls do not apply statistical margins of error. Other sources, including coverage and measurement errors, may impact all sample surveys and polls.

Additionally, discrepancies in totals, not summing to 100, are due to rounding effects. Ipsos measured the accuracy of the online polls using a credibility interval. This survey, while comprehensive, has limitations. The non-random nature of the sample could introduce bias, and results might only be representative of some mobile app performance marketers in each country. The findings should be interpreted within these constraints.

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Thank You

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Danke

ありがとう

Merci

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Terima kasih

Cảm ơn

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