



BENCHMARK REPORT:

The State of Global Mobile Engagement 2020

Data from 744 million mobile app users reveal how the global pandemic is influencing mobile & app engagement.



AIRSHIP

TABLE OF CONTENTS

Introduction & Key Findings

BY SUBREGION

- Location Opt In by Subregions
- Average App Opens per User by Subregions
- Average Direct Open Rates by Subregions

BY COUNTRY

- Highest Opt-In Rates by Country: Top 5 (Location & Notification)

BY VERTICAL

- Location Opt In by Vertical
- Average App Opens by Vertical
- Average Direct Open Rates by Vertical
- Highest Opt-In Rates by Vertical: Top 5 (Location & Notification)

BY PLATFORM

- Location Opt In & Settings by Platform
- Engagement by Platform

Methodology

Conclusion

INTRODUCTION & KEY FINDINGS

How is the pandemic influencing user engagement with mobile apps? Our team of experts set out to understand changing usage patterns to help mobile marketers and mobile product owners better adapt their business to the new economic environment.

To reveal the answer we looked at data from hundreds of millions of individual active global app users. We created two data sets: one a pre-pandemic baseline, consisting of data from February 2019-February 2020, and the other data from March-June 2020 to understand changes to mobile & app engagement after the pandemic began.

Pre-Pandemic Findings (Comparing February 2019 to February 2020 Benchmarks)

- Mobile app audiences continued to grow, up 31% in 2020 compared to 16.6% growth in 2019
- Average location opt-in rates declined, dropping 2.5% year over year to 7.7%
- Over two-thirds of mobile users opt in to receive notifications (66.7%) – up .3%
- Average notification direct open rates stayed relatively flat, moving from 6.44% to 6.35%

Findings From After the Pandemic Began (Comparing February 2020 Benchmarks to March-June 2020)

The global pandemic massively impacted these trends:

- Average location opt-in rates increased every month since the pandemic began in March, growing 39% from February 2020 to reach 10.7% globally in June 2020 – the highest average rate in years
- Both average app opens per user and average notification direct open rates increased 29% over February 2020 benchmarks

COUNTRIES INCLUDED IN SUBREGIONS

Geographic benchmarks in this data study are grouped into subregions; countries included in each subregion are here for reference.

Eastern Asia

China
Hong Kong
Japan
Democratic People's Republic of Korea
(North Korea)
Republic of Korea (South Korea)
Macao
Mongolia
Taiwan

Southern Asia

Afghanistan
Bangladesh
Bhutan
India
Iran (Islamic Republic of)
Maldives
Nepal
Pakistan
Sri Lanka

Southern Europe

Albania
Andorra
Bosnia & Herzegovina
Croatia
Gibraltar
Greece
Holy See
Italy
Malta
Montenegro
North Macedonia
Portugal
San Marino

Serbia
Slovenia
Spain

Eastern Europe

Belarus
Bulgaria
Czechia
Hungary
Moldova Republic of Poland
Romania
Russian Federation
Slovakia
Ukraine

Western Europe

Austria
Belgium
France
Germany
Liechtenstein
Luxembourg
Monaco
Netherlands
Switzerland

Northern Europe

Denmark
Estonia
Faroe Islands
Finland
Guernsey
Iceland
Ireland
Isle of Man
Jersey

Latvia
Lithuania
Norway
Svalbard & Jan Mayen
Sweden
United Kingdom of Great Britain &
Northern Ireland
Åland Islands

Northern America

Bermuda
Canada
Greenland
Saint Pierre & Miquelon
United States of America

Latin America & the Caribbean

Anguilla
Antigua & Barbuda
Argentina
Aruba
Bahamas
Barbados
Belize
Bolivia (Plurinational State of)
Bonaire Sint Eustatius & Saba
Bouvet Island
Brazil
Cayman Islands
Chile
Colombia
Costa Rica
Cuba
Curaçao
Dominica
Dominican Republic

Ecuador
El Salvador
Falkland Islands (Malvinas)
French Guiana
Grenada
Guadeloupe
Guatemala
Guyana
Haiti
Honduras
Jamaica
Martinique
Mexico
Montserrat
Nicaragua
Panama
Paraguay
Peru
Puerto Rico
Saint Barthélemy
Saint Kitts & Nevis
Saint Lucia
Saint Martin (French part)
Saint Vincent & the Grenadines
Sint Maarten (Dutch part)
South Georgia & the South Sandwich
Islands
Suriname
Trinidad & Tobago
Turks & Caicos Islands
Uruguay
Venezuela (Bolivarian Republic of)
Virgin Islands (British)
Virgin Islands (U.S.)

LOCATION OPT-IN BY SUBREGIONS

With the exception of Latin America, all regions saw average location opt-in rates drop between February 2019 and February 2020.

The pandemic reversed this trend, growing opt-in rates across all but three regions where opt-in rates have been historically low.

	PRE-PANDEMIC		AFTER PANDEMIC BEGAN	
	FEB 2020 LOCATION OPT-IN RATE	CHANGE FEB 2020 VS. FEB 2019	JUNE 2020 LOCATION OPT-IN RATE	CHANGE JUNE 2020 VS. FEB 2020
Southern Asia	3.2%	-60% ▼	8.4%	+163% ▲
Latin America & the Caribbean	29.8%	+32% ▲	45.5%	+52.7% ▲
Northern Europe	2.8%	-39% ▼	3.5%	+25% ▲
Northern America	8.4%	-16% ▼	9.9%	+17.9% ▲
Southern Europe	7.8%	-1% ▼	8.2%	+5.1% ▲
Western Europe	.9%	-53% ▼	.7%	-22.2% ▼
Eastern Asia	.4%	-33% ▼	.3%	-25% ▼
Eastern Europe	.7%	-13% ▼	.3%	-57.1% ▼

AVERAGE APP OPENS PER USER BY SUBREGIONS

From February 2019 to February 2020, all regions saw average app opens per user per month decline.

March-June 2020 reversed this trend with all regions seeing growth.

	PRE-PANDEMIC		AFTER PANDEMIC BEGAN	
	FEB 2020 AVG. OPENS PER USER	CHANGE FEB 2020 VS. FEB 2019	MARCH-JUNE 2020 AVG. OPENS PER USER	CHANGE MARCH-JUNE 2020 AVG. VS. FEB 2020
Eastern Europe	15.5	-33.5% ▼	21.6	+39.4% ▲
Northern Europe	25.6	-27.5% ▼	34.2	+33.6% ▲
Eastern Asia	20.6	-48.9% ▼	27	+31.1% ▲
Western Europe	21.2	-15.5% ▼	27.3	+28.5% ▲
Northern America	16.9	-27.8% ▼	21.7	+28.3% ▲
Latin America & the Caribbean	13.6	-38.5% ▼	16.5	+21.1% ▲
Southern Asia	19	-15.4% ▼	22.8	+19.7% ▲
Southern Europe	15.5	-22.1% ▼	22.4	+13.3% ▲

AVERAGE DIRECT OPEN RATES BY SUBREGIONS

Pre-pandemic, subregions were evenly split between those seeing increases and those seeing decreases in average notification direct open rates.

After the pandemic began, from March to June 2020, average direct notification open rates grew for all but one subregion (Southern Asia).

	PRE-PANDEMIC		AFTER PANDEMIC BEGAN	
	FEB 2020 AVG. DIRECT OPEN RATE	CHANGE FEB 2020 VS. FEB 2019	MARCH-JUNE 2020 AVG. DIRECT OPEN RATE	CHANGE MARCH-JUNE 2020 AVG. VS. FEB 2020
Western Europe	8%	+5.4% ▲	11.3%	+40.6% ▲
Northern Europe	6.1%	-16.8% ▼	8.4%	+36.9% ▲
Eastern Asia	7.9%	-4.3% ▼	10.7%	+34.8% ▲
Northern America	6.8%	+1.5% ▲	8.6%	+25.9% ▲
Latin America & the Caribbean	4.3%	-29% ▼	4.7%	+9.9% ▲
Southern Europe	9.4%	+9.6% ▲	9.6%	+3.1% ▲
Eastern Europe	11.3%	+33.1% ▲	11.5%	+2% ▲
Southern Asia	2.4%	-37.1% ▼	2.4%	-2.1% ▼

HIGHEST OPT-IN RATES BY COUNTRY: TOP 5

Our data shows major gains in location opt-in rates worldwide since the pandemic began, while notification opt-in rates have held relatively steady. Brazil has the highest average location opt-in rate, while Indonesia has the highest notification opt-in rate.

Avg Location Opt-In Rate

	JUNE 2020	CHANGE SINCE FEB 2020
Brazil	65.1%	+36.8% ▲
Greece	48.8%	-6.9% ▼
Portugal	13.7%	+38.4% ▲
Sweden	11.5%	+15% ▲
USA	10.4%	+18.2% ▲

Avg Notification Opt-In Rate

	JUNE 2020	CHANGE SINCE FEB 2020
Indonesia	87.3%	-1.1% ▲
Mexico	86.5%	-2% ▼
Greece	86.2%	0%
Columbia	85.7%	-0.6% ▼
Brazil	85.4%	+0.6% ▲

While it didn't make the top five, India experienced the biggest growth since February 2020 in both average location opt-in rate at +166% and average notification opt-in rate at +8.7%.

LOCATION OPT-IN BY VERTICAL

Before the pandemic began, eight of twelve verticals had seen declines in average location opt-in rates.

After the pandemic began, eight of the twelve had significant increases.

	PRE-PANDEMIC		AFTER PANDEMIC BEGAN	
	FEB 2020 LOCATION OPT-IN RATE	CHANGE FEB 2020 VS. FEB 2019	JUNE 2020 LOCATION OPT-IN RATE	CHANGE JUNE 2020 VS. FEB 2020
Medical, Health & Fitness	0.2%	-33% ▼	0.5%	+150% ▲
Finance & Insurance	1.8%	+29% ▲	4.1%	+128% ▲
Travel & Transportation	5.5%	-57% ▼	11.9%	+116% ▲
Utilities	10.5%	+44% ▲	14.1%	+34% ▲
Gambling & Gaming	0.9%	-10% ▼	1.2%	+33% ▲
Retail	17.7%	+25% ▲	23.1%	+31% ▲
Food & Drink	2.1%	+24% ▲	2.5%	+19% ▲
Media	7.2%	-39% ▼	8.2%	+14% ▲
Sports & Recreation	6.3%	-21% ▼	4.1%	-35% ▼
Business	0.2%	-67% ▼	0.1%	-50% ▼
Entertainment	14.3%	-35% ▼	7.1%	-50% ▼
Tech, Internet & Productivity	0.7%	-42% ▼	0.1%	-86% ▼

Data set includes verticals that had 10 million users or more.

AVERAGE APP OPENS BY VERTICAL

Eleven of twelve verticals had declining app opens per user between February 2019 and February 2020. After the pandemic began, all but two had increasing app opens.

Media as well as Medical, Health & Fitness brands had the highest growth rates comparing March-June 2020 average benchmarks to February 2020, followed by Entertainment and Tech, Internet & Productivity.

	PRE-PANDEMIC		AFTER PANDEMIC BEGAN	
	FEB 2020 AVG. OPENS PER USER	CHANGE FEB 2020 VS. FEB 2019	MARCH-JUNE 2020 AVG. OPENS PER USER	CHANGE MARCH-JUNE 2020 AVG. VS. FEB 2020
Medical, Health & Fitness	18.4	-1.6% ▼	29.4	+60% ▲
Media	28.5	-27.8% ▼	44.1	+55% ▲
Entertainment	12	-14.9% ▼	16.9	+40% ▲
Tech, Internet & Productivity	17.3	-14.8% ▼	24.3	+40% ▲
Retail	11.5	-24.3% ▼	15.9	+38% ▲
Utilities	5.7	-24% ▼	7.7	+35% ▲
Business	10	-48.2% ▼	12.6	+26% ▲
Finance & Insurance	16.3	-39.2% ▼	19.8	+22% ▲
Gambling & Gaming	31.7	-13.4% ▼	36.4	+15% ▲
Food & Drink	10.9	-21.6% ▼	11.1	+2% ▲
Travel & Transportation	14.6	+18.7% ▲	11.3	-23% ▼
Sports & Recreation	34.8	-15.1% ▼	23.0	-34% ▼

AVERAGE DIRECT OPEN RATES BY VERTICAL

Looking at data from February 2019-February 2020, verticals were evenly split between those seeing increases and decreases in average notification direct open rates.

However over March-June 2020, average direct notification open rates grew for all but three verticals – Entertainment, Utilities and Travel & Transportation – which saw relatively small declines.

	PRE-PANDEMIC		AFTER PANDEMIC BEGAN	
	FEB 2020 AVG DIRECT OPEN RATE	CHANGE FEB 2020 VS. FEB 2019	MARCH-JUNE AVG. DIRECT OPEN RATE	CHANGE MARCH-JUNE 2020 AVG. VS. FEB 2020
Finance & Insurance	6.6%	+28.8% ▲	13.1%	+98.4% ▲
Food & Drink	4.9%	+2.8% ▲	8.2%	+71.1% ▲
Sports & Recreation	3.8%	-18.6% ▼	5.6%	+46.1% ▲
Media	4.3%	-7.5% ▼	5.8%	+32.9% ▲
Retail	7.6%	-30.2% ▼	9.6%	+27.5% ▲
Business	4.6%	-41.6% ▼	5.8%	+25.5% ▲
Medical, Health & Fitness	6.4%	-14.3% ▼	7.8%	+22.7% ▲
Gambling & Gaming	3.7%	+17.4% ▲	4.5%	+22.6% ▲
Tech, Internet & Productivity	10.7%	+8% ▲	12.1%	+13.4% ▲
Utilities	12.5%	+18% ▲	12.1%	-2.5% ▼
Travel & Transportation	15.4%	-17.9% ▼	14.3%	-7.1% ▼
Entertainment	6.3%	+22.3% ▲	5.2%	-16.5% ▼

HIGHEST OPT-IN RATES BY VERTICAL: TOP 5

Our data shows major gains in location opt-in rates worldwide since the pandemic began, while notification opt-in rates have held relatively steady. Retail has the highest average location opt-in rate, while Utilities has the highest notification opt-in rate.

Avg Location Opt-In Rate

	PRE-PANDEMIC	AFTER PANDEMIC BEGAN
	AVG LOCATION OPT-IN RATE JUNE 2020	CHANGE SINCE FEB 2020
Retail	23.1%	+31% ▲
Utilities	14.1%	+34% ▲
Travel & Transportation	11.9%	+116% ▲
Media	8.2%	+14% ▲
Entertainment	7.1%	-50% ▼

Brands in the Medical, Health & Fitness sector had the largest growth in average location opt-in rates since February 2020 at +150%.

Avg Notification Opt-In Rate

	PRE-PANDEMIC	AFTER PANDEMIC BEGAN
	AVG NOTIFICATION OPT-IN RATE JUNE 2020	CHANGE SINCE FEB 2020
Utilities	87.8%	-0.7% ▼
Business	79.9%	+5.3% ▲
Finance & Insurance	75.7%	+4.7% ▲
Travel & Transportation	67.6%	+7.6% ▲
Sports & Recreation	66%	-2.7% ▼

Brands in the Travel & Transportation sector had the largest growth in average notification opt-in rates since February 2020 at +7.6%.

LOCATION OPT IN & SETTINGS BY PLATFORM

Since February 2020, users opting in to share their location have grown every month across both platforms.



61.2% of iOS users that enable location choose to share it while using an app (Foreground). “Share once,” a new single session permission contributed to growth in users that are classified as Unprompted.

Android users choosing Not Allowed grew 18.6%, while adoption of Android 10 (16.4% of Android users globally) sees growing Foreground Allowed adoption.

Location Opt In

	PRE-PANDEMIC		AFTER PANDEMIC BEGAN	
	FEB 2020 LOCATION OPT-IN RATE	CHANGE FEB 2020 VS. FEB 2019	JUNE 2020 LOCATION OPT-IN RATE	CHANGE SINCE FEB 2020
Android	7.2%	+4.3% ▲	11.2%	+55.6% ▲
iOS	8.4%	-6.7% ▼	10.3%	+22.6% ▲

Location Settings

				
	JUNE 2020 % OF iOS USERS	CHANGE SINCE FEB 2019	JUNE 2020 % OF ANDROID USERS	CHANGE SINCE FEB 2019
Foreground Allowed	61.2	+6.6% ▲	7.8%	N/A
Always Allowed	7.1%	-53.4% ▼	29.7%	-32% ▼
Not Allowed	14.4%	-0.5% ▼	60.7%	+18.6% ▲
Unprompted	16.1%	+41.2% ▲	N/A	N/A
System Location Disabled	1.3%	-21.6% ▼	1.9%	-64.3% ▼

ENGAGEMENT BY PLATFORM

While Android just recently overtook iOS in terms of its overall average location opt-in rate, it has a long-held lead in notification opt-ins. Both before and after the pandemic began, Android users receive more notifications per month than iOS users, but users of either device directly open notifications at about the same average rate.

PRE - PANDEMIC

	FEB 2020 AVG. PUSH OPT-IN RATE (YOY)	FEB 2020 AVG. APP OPENS (YOY)	FEB 2020 AVG. DIRECT OPEN RATES (YOY)	FEB 2020 AVG. SENDS PER MONTH (YOY)
Android	81.5% (-.9%)	15.4 (-33.3%)	6.3% (+2.6%)	33.4 (-26.3%)
iOS	51.3% (+2%)	20.1 (-23%)	6.4% (-7.2%)	23.2 (-8.3%)

Android users received 44% more notifications per month than iOS users, while iOS average app opens per user was 31% greater.

AFTER PANDEMIC BEGAN

	MARCH-JUNE 2020 AVG. PUSH OPT-IN RATE (CHANGE SINCE FEB 2020)	MARCH-JUNE 2020 AVG. APP OPENS (CHANGE SINCE FEB 2020)	MARCH-JUNE 2020 AVG. DIRECT OPEN RATES (CHANGE SINCE FEB 2020)	MARCH-JUNE 2020 AVG. SENDS PER MONTH (CHANGE SINCE FEB 2020)
Android	82.5% (+1.3%)	19.8 (+28.6%)	8.2% (+30.6%)	28.7 (-14.1%)
iOS	51.1% (-.4%)	25.9 (+29%)	8.2% (+27%)	18.8 (-19%)

Android users received 53% more notifications per month than iOS users, while iOS average app opens per user was 31% greater.

METHODOLOGY

To provide an accurate view of year-over-year mobile trends this benchmark study analyzes year-over-year behaviors of global app users active in February 2019 (568 million) and February 2020 (744 million), and then compares that to users active from March through June 2020 to reveal the impact of the global pandemic on mobile usage.

- Data includes 744,469,537 individual app users, of which 52% were Android and 48% were iOS
- Subregions and industry verticals included were those with 10 million or more users in February 2020
- Countries included were those with 1 million or more users in February 2020
- The number of apps included in each vertical as of Feb. 2020:

Business - **733**

Entertainment - **257**

Finance & Insurance - **838**

Food & Drink - **301**

Gambling & Gaming - **203**

Media - **1,473**

Medical, Health & Fitness - **132**

Retail - **292**

Sports & Recreation - **466**

Tech, Internet & Productivity - **249**

Travel & Transportation - **607**

Utilities - **78**

CONCLUSION

The data clearly shows that the **pandemic has further cemented mobile as the center of people's lives for in-the-moment information and streamlined conveniences** to manage through this extraordinary time.

With approximately 30% grow for app audiences, app opens per user and notification direct open rates, and location opt-in rates at their highest in years, more people are experiencing the value of a direct mobile connection and sharing information with the apps and brands they trust.

Location-sharing is poised for growth when the current crisis subsides, as consumers will likely retain many new behaviors, and both Apple and Google are providing less specific and more temporary ways to share location.

Brands around the world need to continue to accelerate their mobile maturity, implementing solutions and use cases that will help them meet and exceed already-high customer expectations for mobile experiences.

No matter where your brand is on the mobile maturity scale, we're here to help you move to the next level. Our experts are ready to help: [get in touch with our team anytime.](#)



Portland
San Francisco
New York
Santa Barbara
London
Paris
New Delhi
Munich
Singapore

+1 855 385 3155
+44 (0)300 303 8796

AIRSHIP.COM

