WEBINAR

Global State of Mobile

NOVEMBER 10 AT 2 P.M. ET

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Andrea Sangalli
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YOUR PRESENTERS

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PRODUCT MANAGER, DIGITAL AUDIENCE

Andrea Sangalli

PRODUCT MANAGEMENT ANALYST, INTERNATIONAL MARKETS

Agenda

1

Global mobile trends and COVID-19 related impacts

2

U.S. deep dive:
Mobile video consumption

3

U.S. deep dive:
Mobile ordering

4

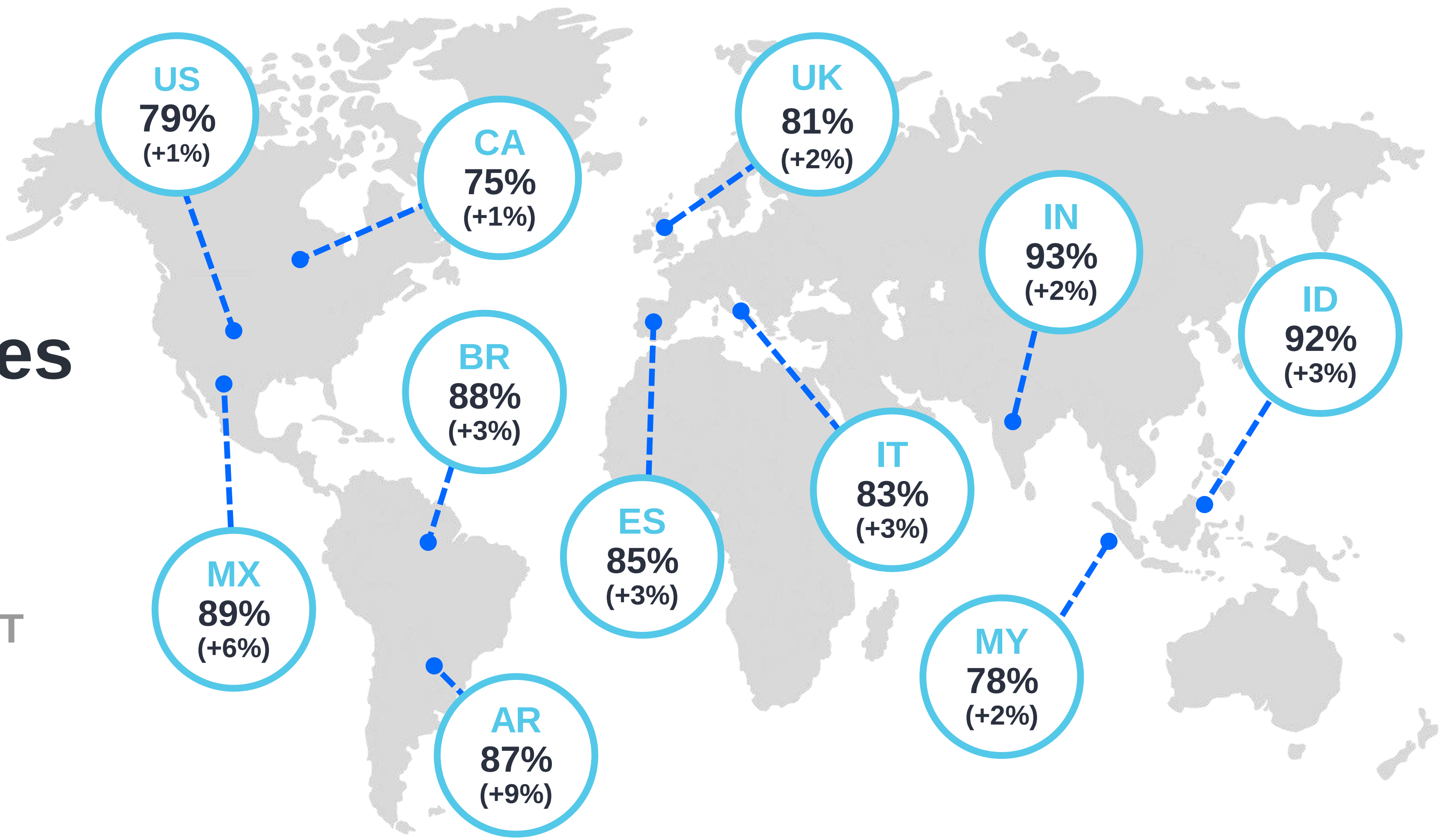
U.S. deep dive:
Mobile payments

5

The future of privacy and mobile

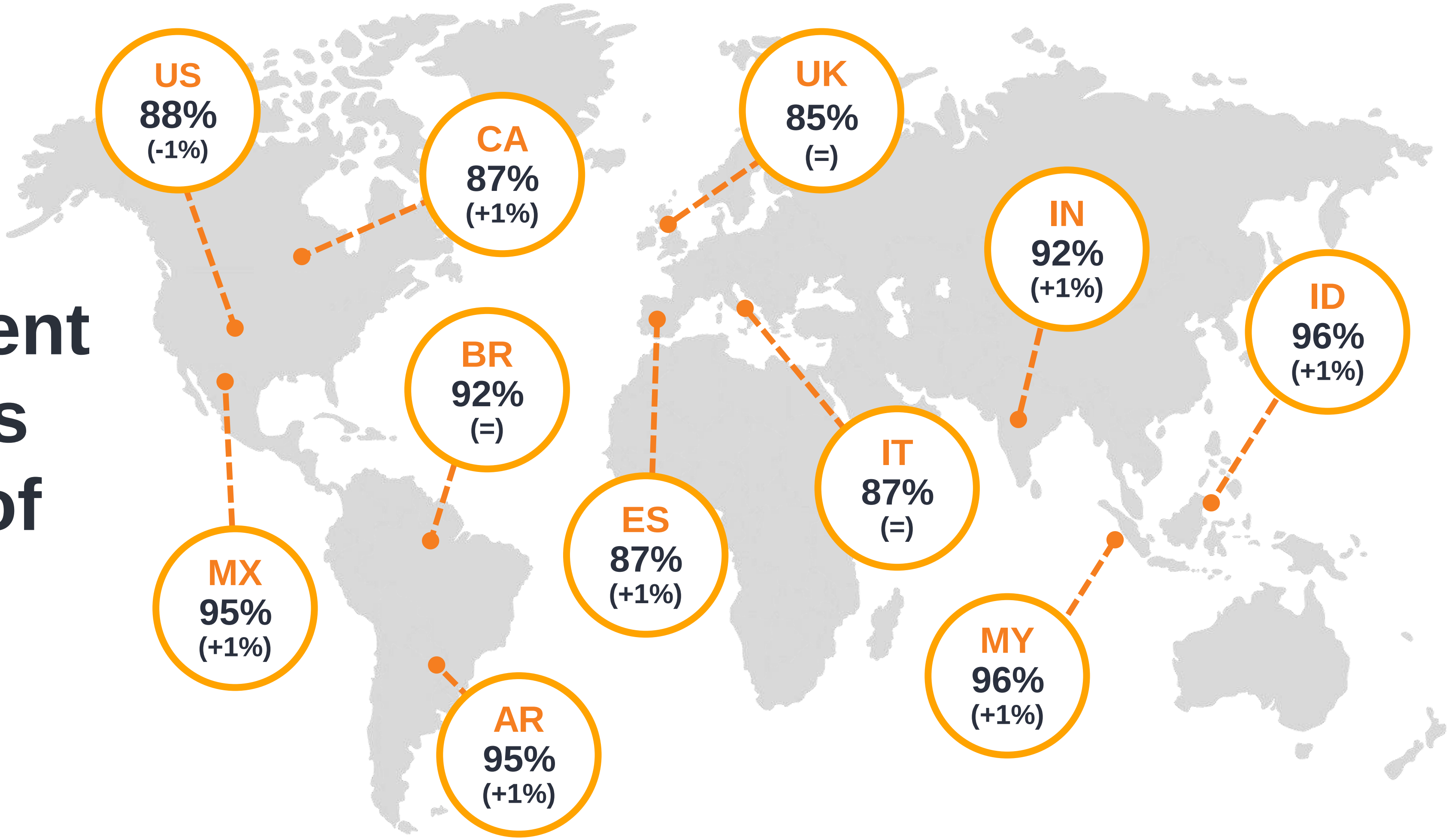
Globally, time spent on mobile continues to rise

MOBILE MINUTES AS A PERCENTAGE OF TOTAL DIGITAL MINUTES, AUGUST 2020 (VS. AUGUST 2019)



Source: Comscore MMX® Multi-Platform, Total Minutes, August 2019 vs August 2020, Selected Countries Shown (Other Data Using Worldwide Rollups Contains Additional Countries – See Appendix for Details)
Percentage change expressed as absolute values.

And of time spent on mobile, apps drive majority of minutes

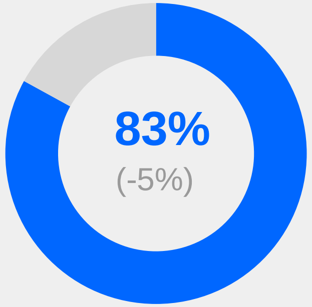


Source: Comscore Mobile Metrix®, Mobile web vs mobile app, Total minutes, Standard audience sets, August 2019 - August 2020, Selected Countries Shown
(Other Data Using Worldwide Rollups Contain Additional Countries – See Appendix for Details)
Percentage change expressed as absolute values.

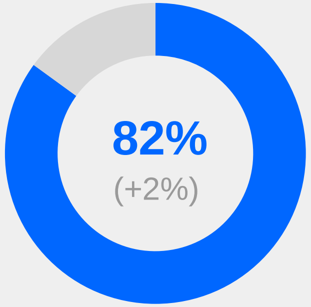
Certain app categories worldwide skew toward mobile-only usage, while others see more desktop usage

% OF TOTAL DIGITAL AUDIENCE WHO ACCESS APP CATEGORIES USING MOBILE-ONLY

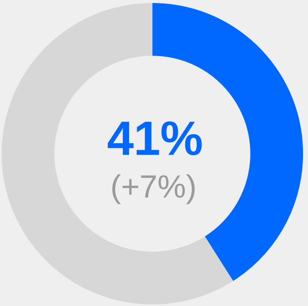
SOCIAL MEDIA
INSTANT MESSENGERS



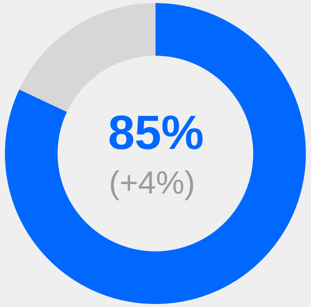
NEWS/INFORMATION
WEATHER



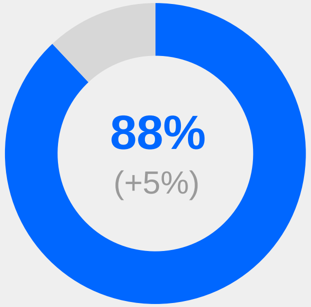
FAMILY & YOUTH
EDUCATION



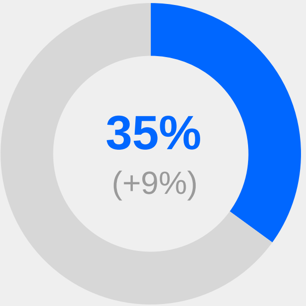
LIFESTYLES
DATING



SERVICES
COUPONS/INCENTIVES



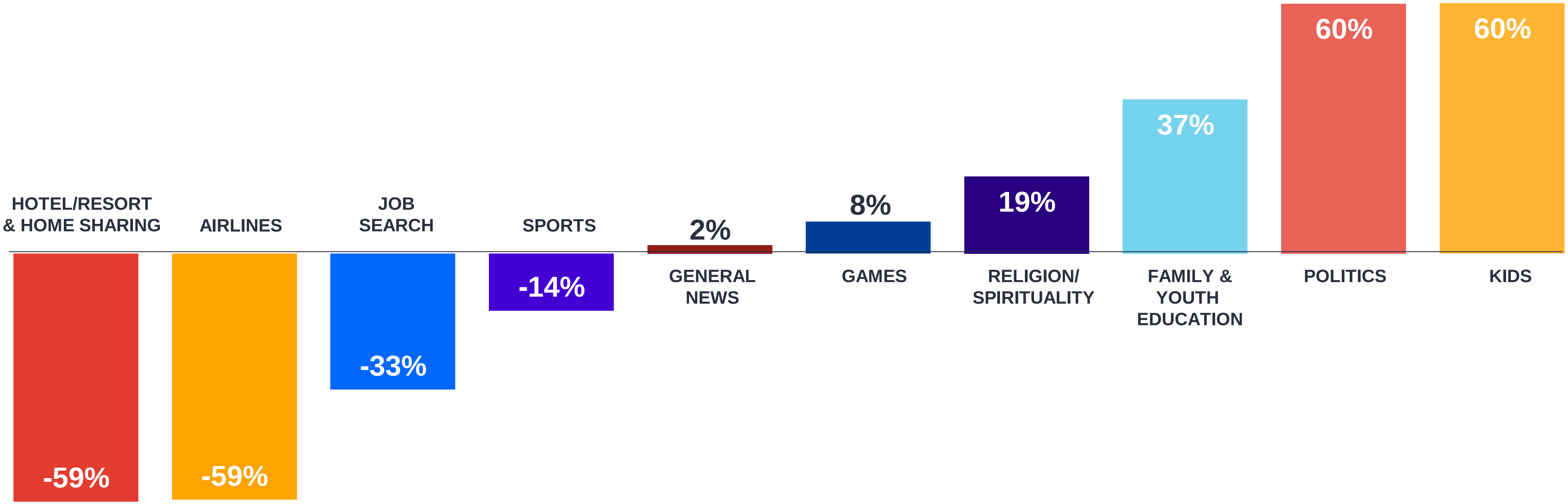
EDUCATION **TRAINING &**
HIGHER ADVANCEMENT



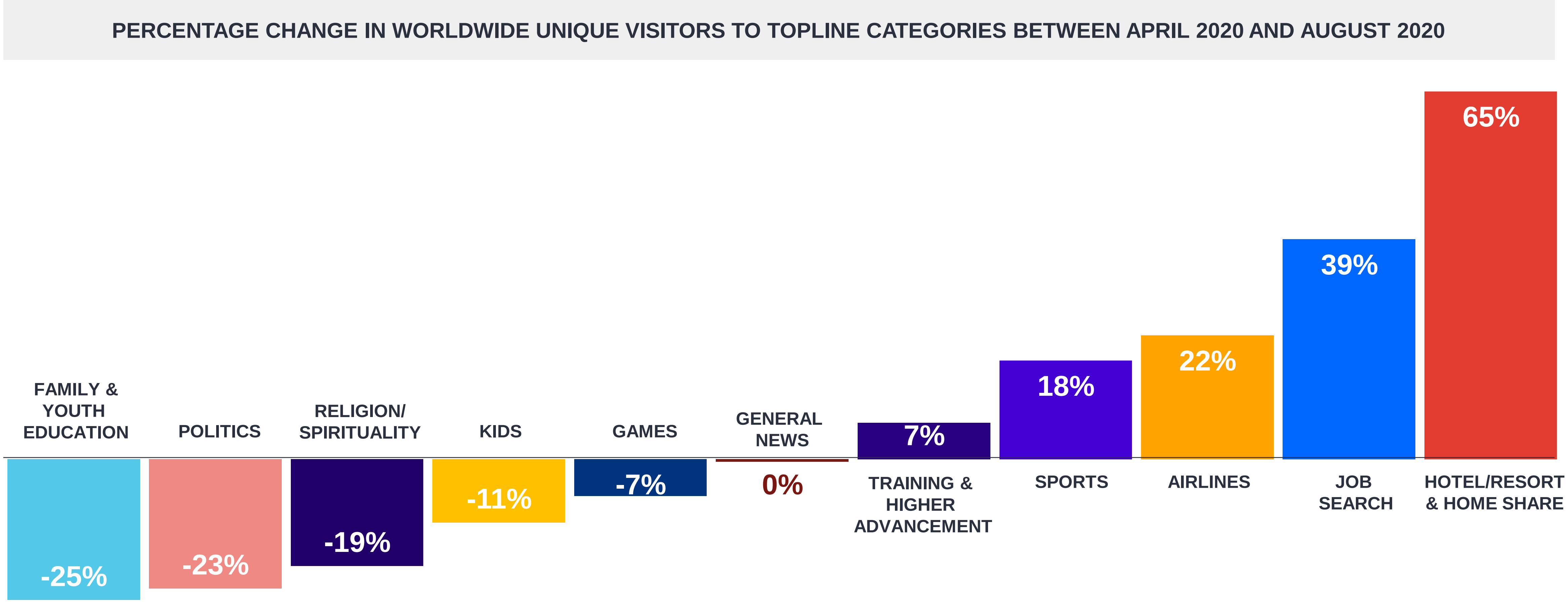
Source: Comscore Mobile Metrix®, Mobile Web and App, August 2020 Worldwide Rollup

In early 2020, COVID-19 impacts were seen across out-of-home and travel related categories

PERCENTAGE CHANGE IN WORLDWIDE UNIQUE VISITORS TO TOPLINE CATEGORIES BETWEEN AUGUST 2019 AND APRIL 2020



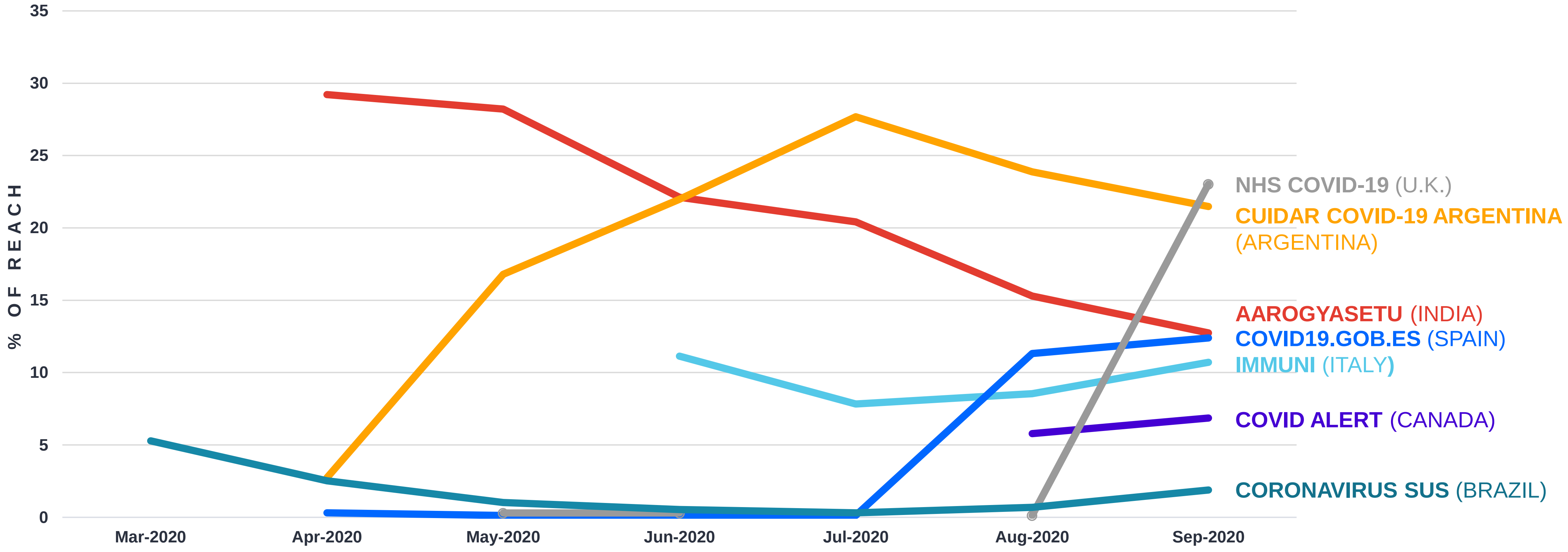
However, we've seen a rebound to those impacted categories after peak COVID-19 shutdowns in April 2020



Source: Comscore Mobile Metrix®, Mobile Web and App, April 2020 - August 2020, Worldwide Rollup

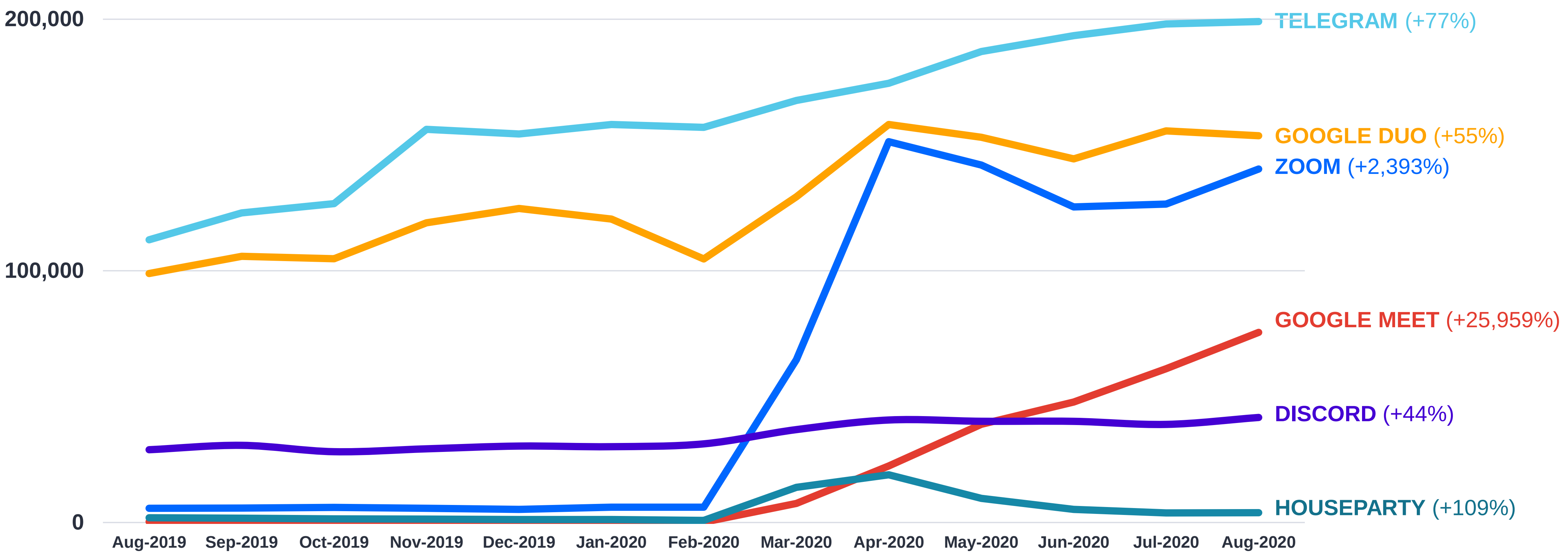
A new category of apps has emerged, pushing adoption of COVID-tracing apps around the world

MOBILE AUDIENCE PENETRATION OF SELECT COVID-TRACING AND SYMPTOM TRACKING APPS (MOBILE APP ONLY)



Social/collaboration mobile apps are seeing sustained boosts from worldwide pandemic restrictions

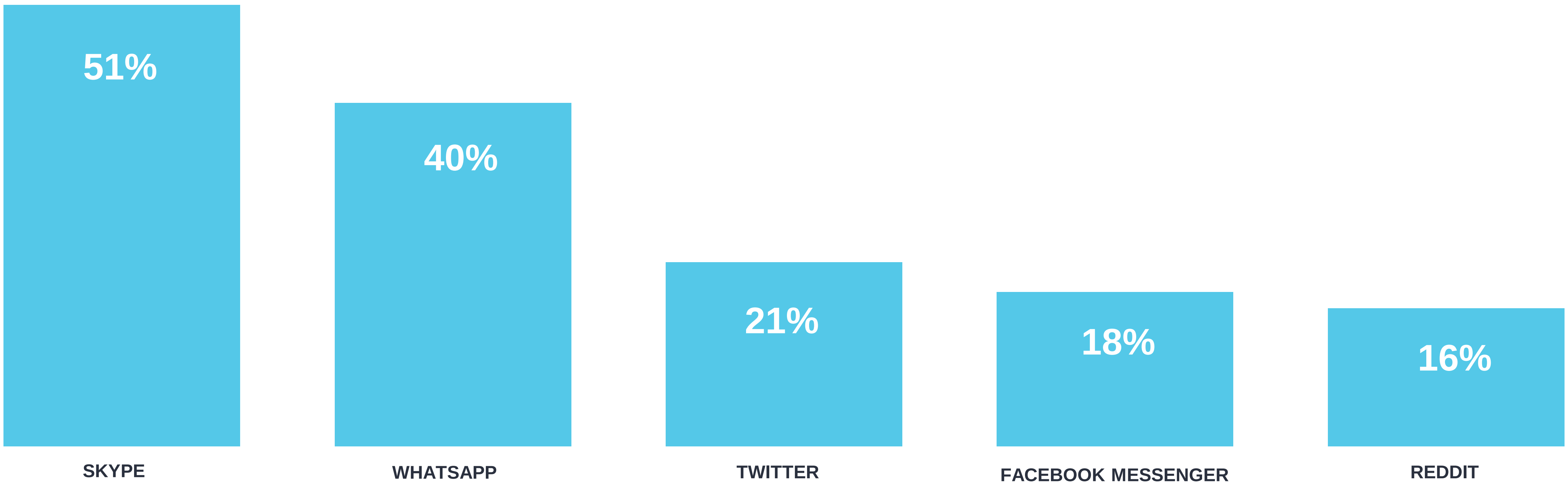
TOTAL UNIQUE VISITORS (000) TO SELECTED SOCIAL/COLLABORATION APPS WITH UV > 50,000,000 (YEAR-OVER-YEAR)



Source: Comscore Mobile Metrix®, Mobile Apps Only, Aug 2019 – Aug 2020, Worldwide Rollup

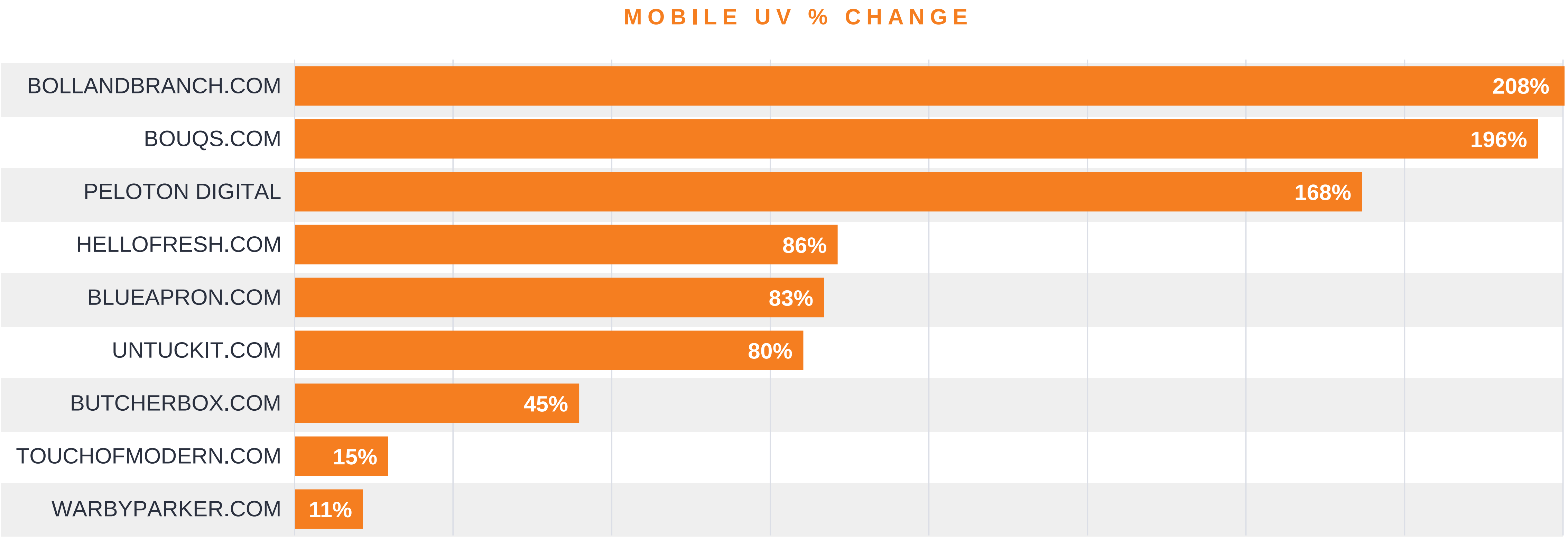
Time spent in social platforms jumped in 2020, as people replaced offline interaction with online chill sessions on mobile

YOY PERCENT CHANGE IN TOTAL MINUTES, SELECT LARGE CAP SOCIAL APPS



In the U.S., direct-to-consumer brands gained penetration

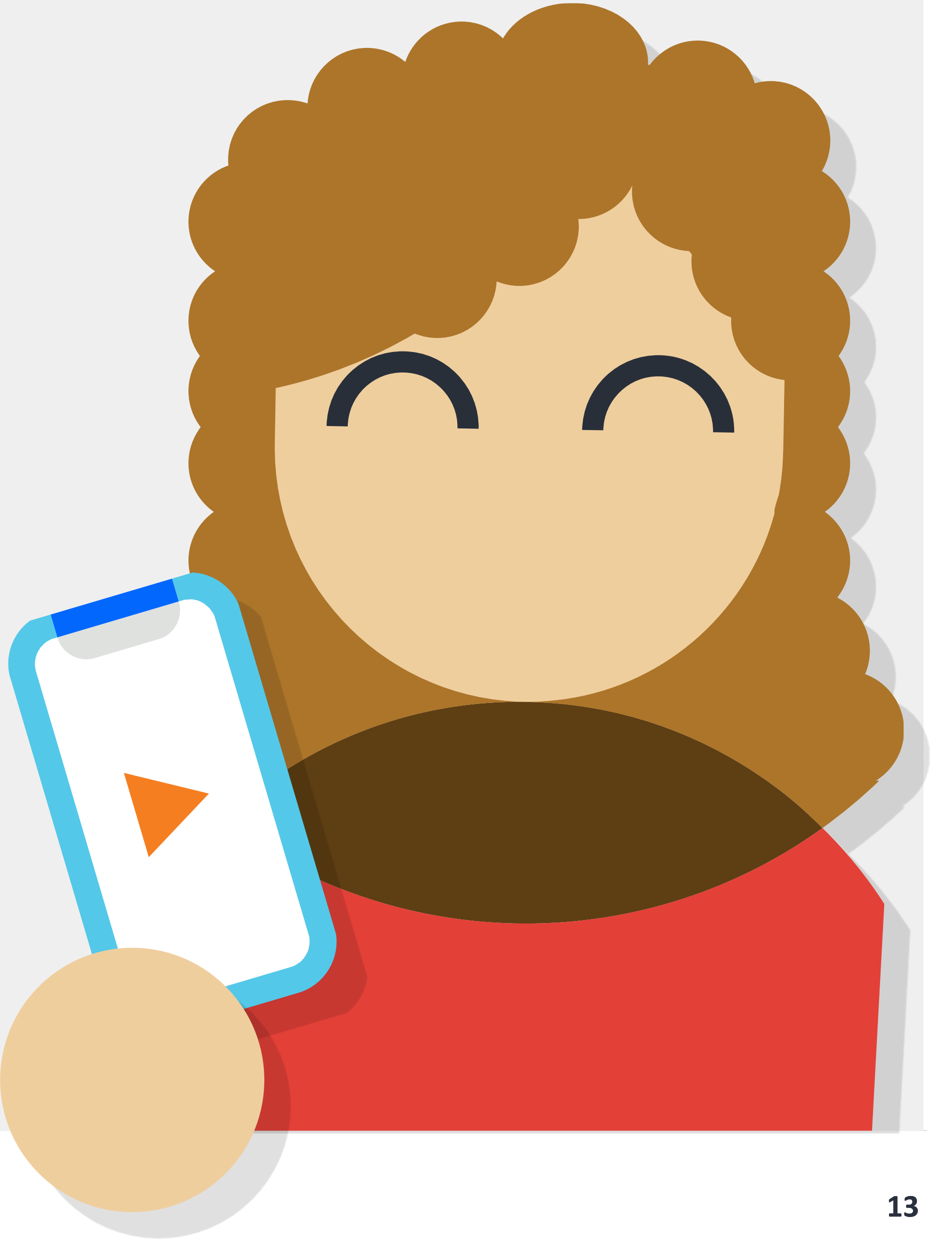
YOY US DTC UV % CHANGE - AUGUST 2019 TO AUGUST 2020 - TOTAL DIGITAL, TOTAL MOBILE



Source: Comscore MMX® Multi-Platform, % Change Media Trend, Selected Apps, Mobile App and Web, August 2019 to August 2020, U.S.

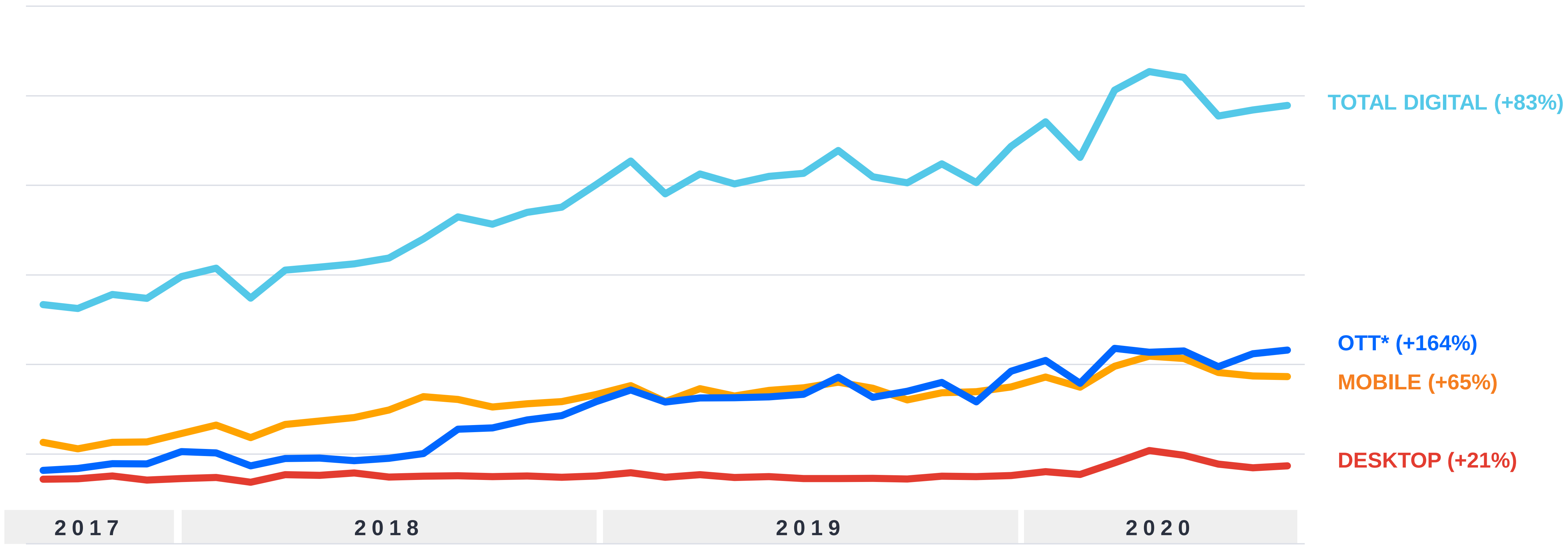
U.S. DEEP DIVE:

Mobile Video Consumption



Video consumption continues to grow, with mobile video remaining comparable to OTT

TOTAL TIME SPENT VIEWING MOBILE, DESKTOP AND OTT VIDEO - (PERCENT INCREASE SINCE AUGUST 2017)

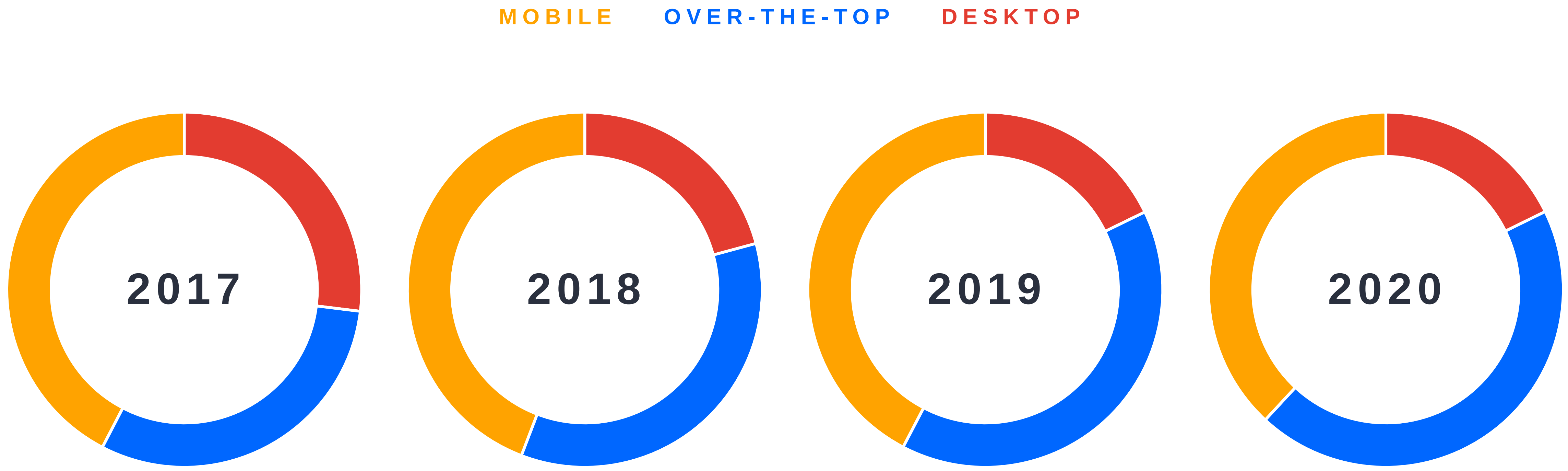


comscore

Source: Comscore Video Metrix Multi-Platform and OTT Intelligence, August 2017 – August 2020, U.S.
Desktop and Mobile sourced from Video Metrix Multi-Platform, *OTT sourced from OTT Intelligence
Total Digital = Desktop + Mobile + OTT

Mobile video consumption continues to provide comparable time spent consuming digital video as OTT

PROPORTION OF TIME SPENT WATCHING DIGITAL VIDEO PER PLATFORM (AUGUST OF EACH YEAR)



comscore

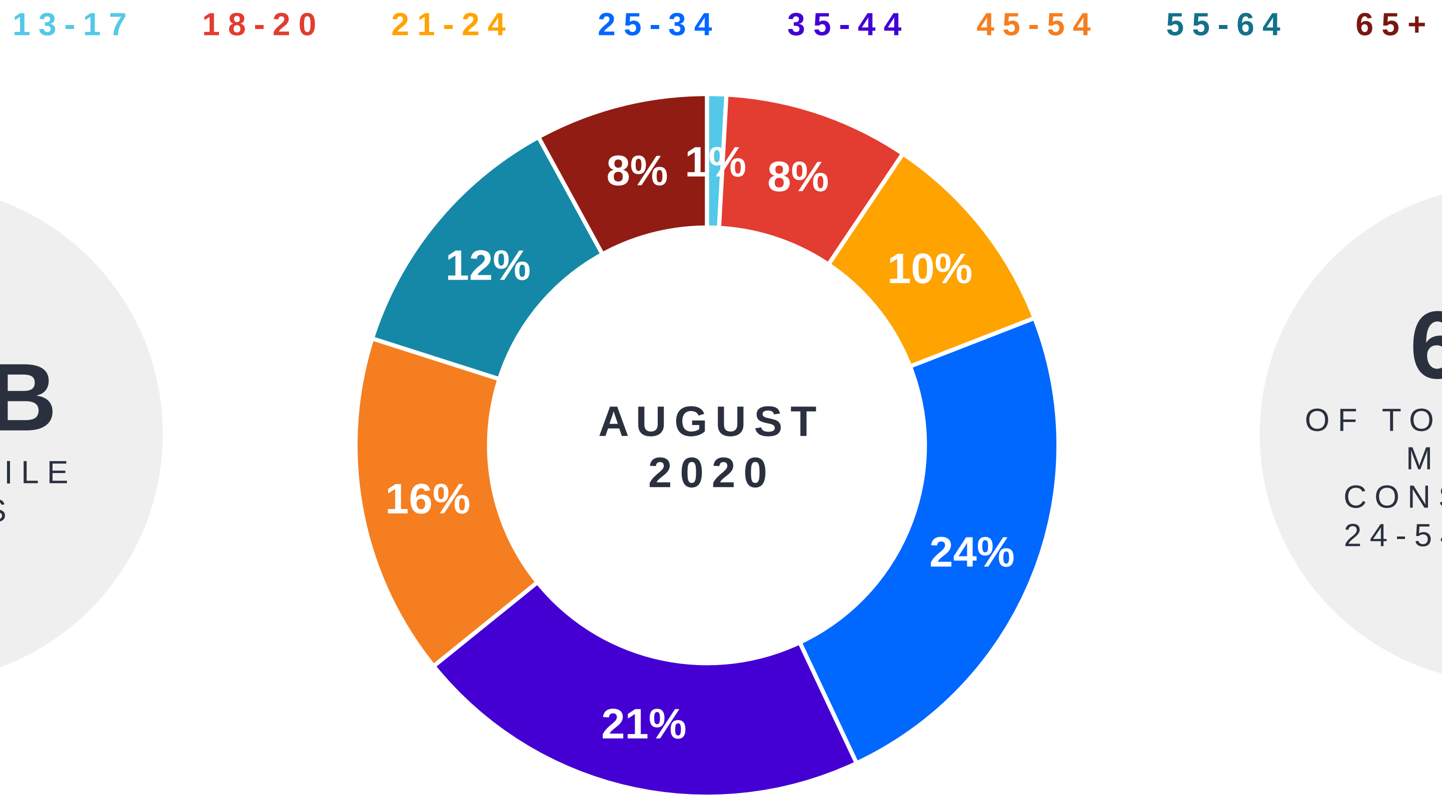
Source: Video Metrix Multi-Platform, U.S. and Comscore OTT Intelligence, U.S.
Desktop and Mobile sourced from Video Metrix Multi-Platform, OTT sourced from OTT Intelligence

Users in the 25-54 age group consume almost two thirds of total mobile video

% TOTAL MOBILE MINUTES BY AGE COHORT - 13 TO 65+ - US - AUGUST 2020

+370B

TOTAL MOBILE MINUTES



61%

OF TOTAL MOBILE MINUTES CONSUMED BY 24-54 COHORT

U.S. DEEP DIVE:

Mobile Ordering for Food & Grocery

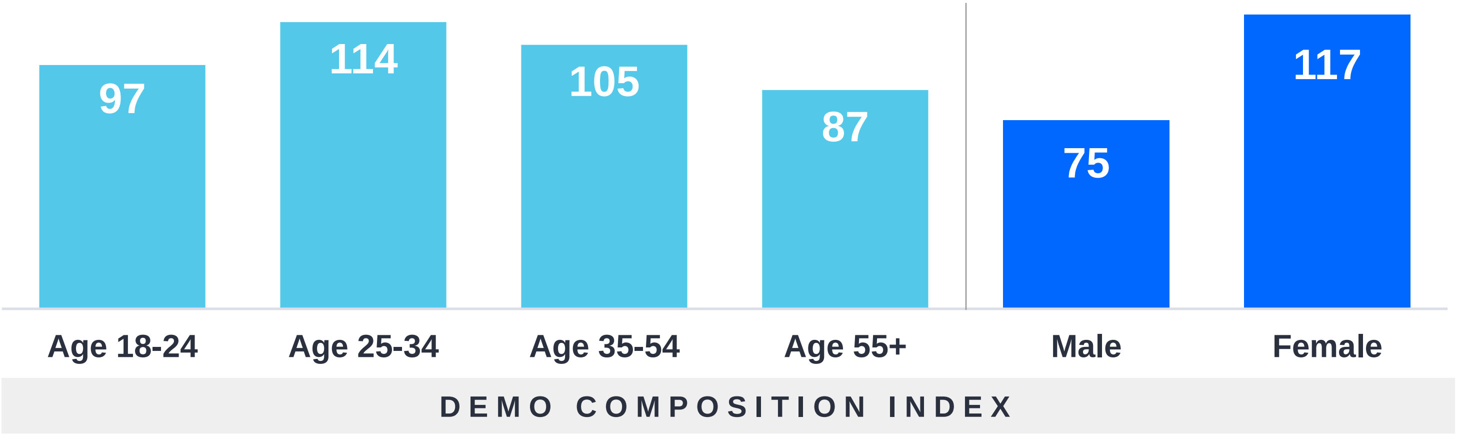
Less on-the-go behaviors and impacts to younger users in the U.S. may explain shifts in food and grocery

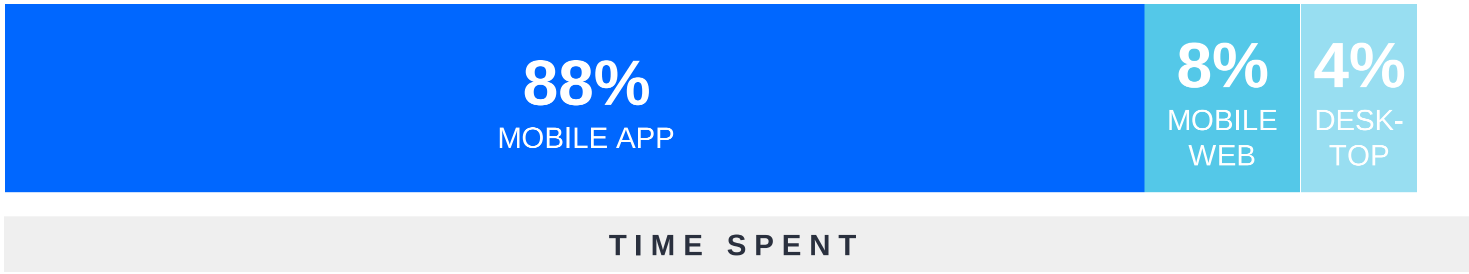
The food and grocery category saw overall YoY declines in reach, from **53% to 47%**

+2% Desktop saw +2% unique visitors YoY

-10% Mobile web and apps YoY change

U.S. UNIQUE VISITORS

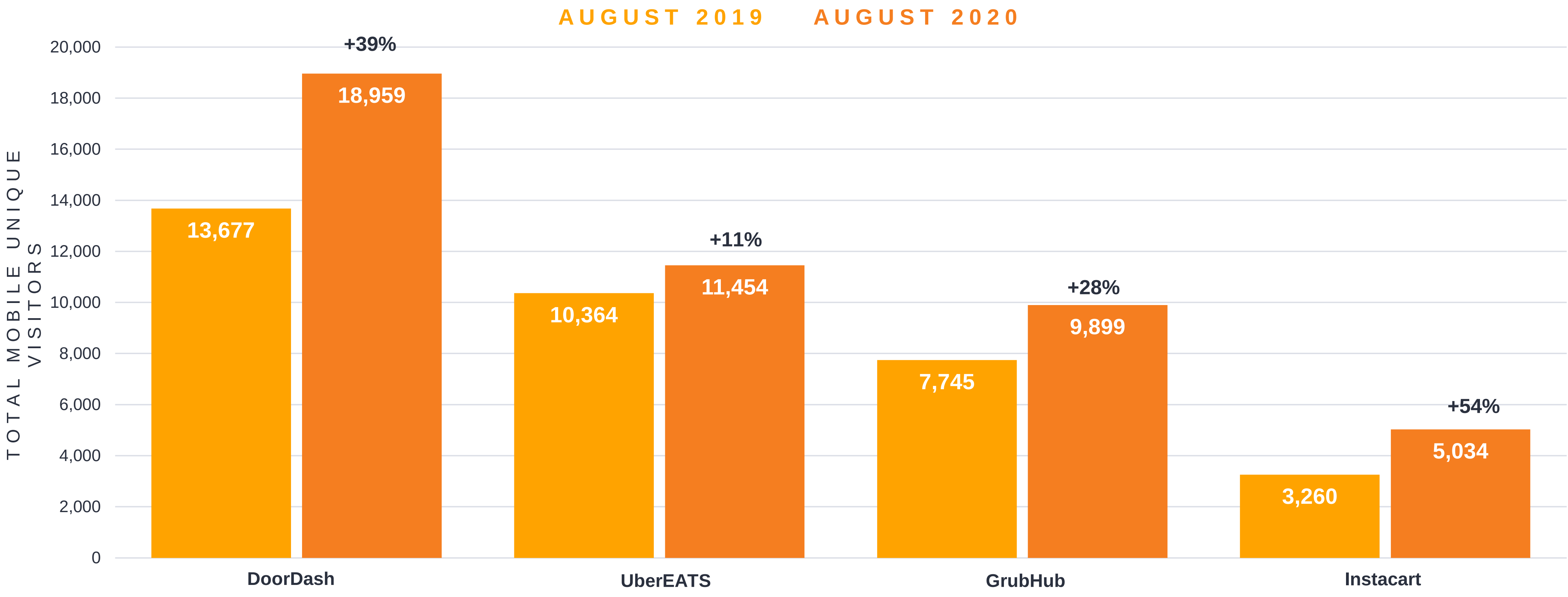




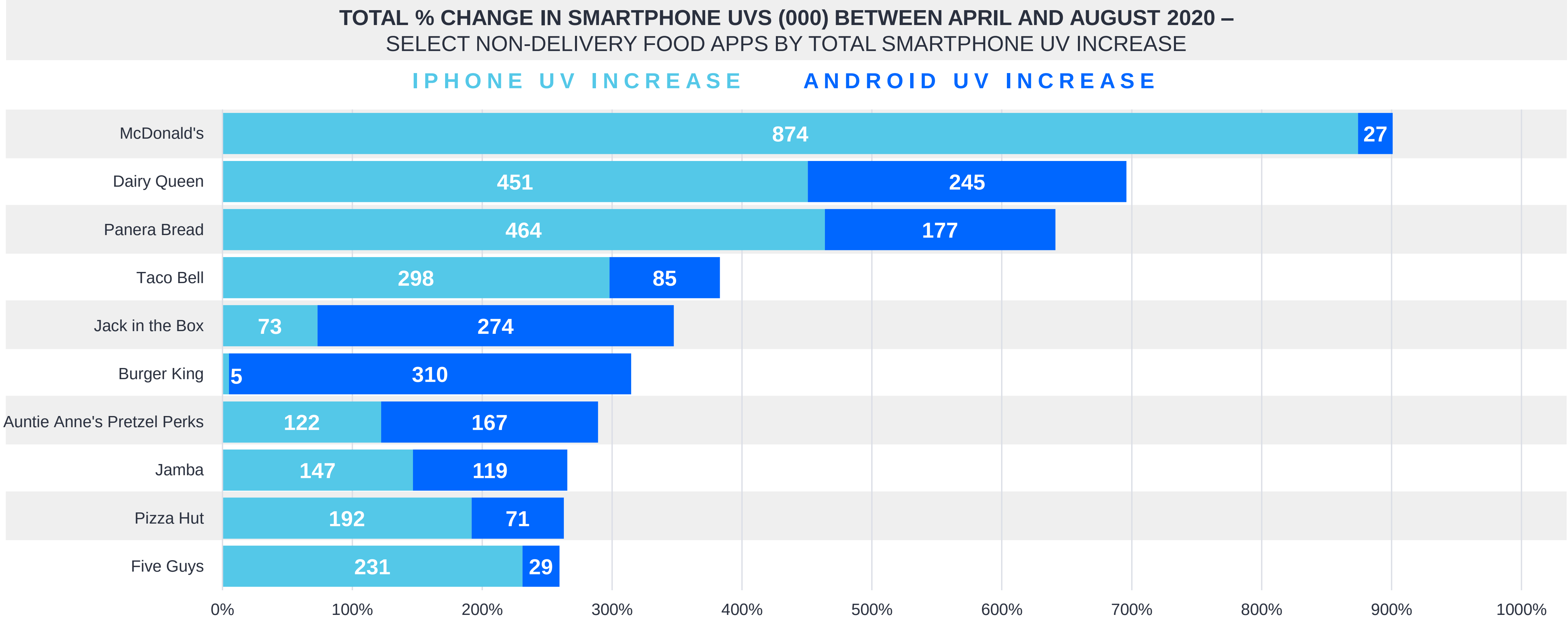
Source: Comscore Media Metrix® Multi-Platform & Comscore Mobile Metrix®, Food/Supermarket/Grocery Category, Desktop/Mobile App And Web, A18+, August 2019 – August 2020, U.S.

U.S. consumers flocked to delivery-based food and grocery apps in 2020

US TOTAL UV YOY CHANGE - AUG '19 TO AUG '20 – SELECT MOBILE FOOD ORDERING & DELIVERY APPS WITH TOTAL MOBILE UV (000) > 500



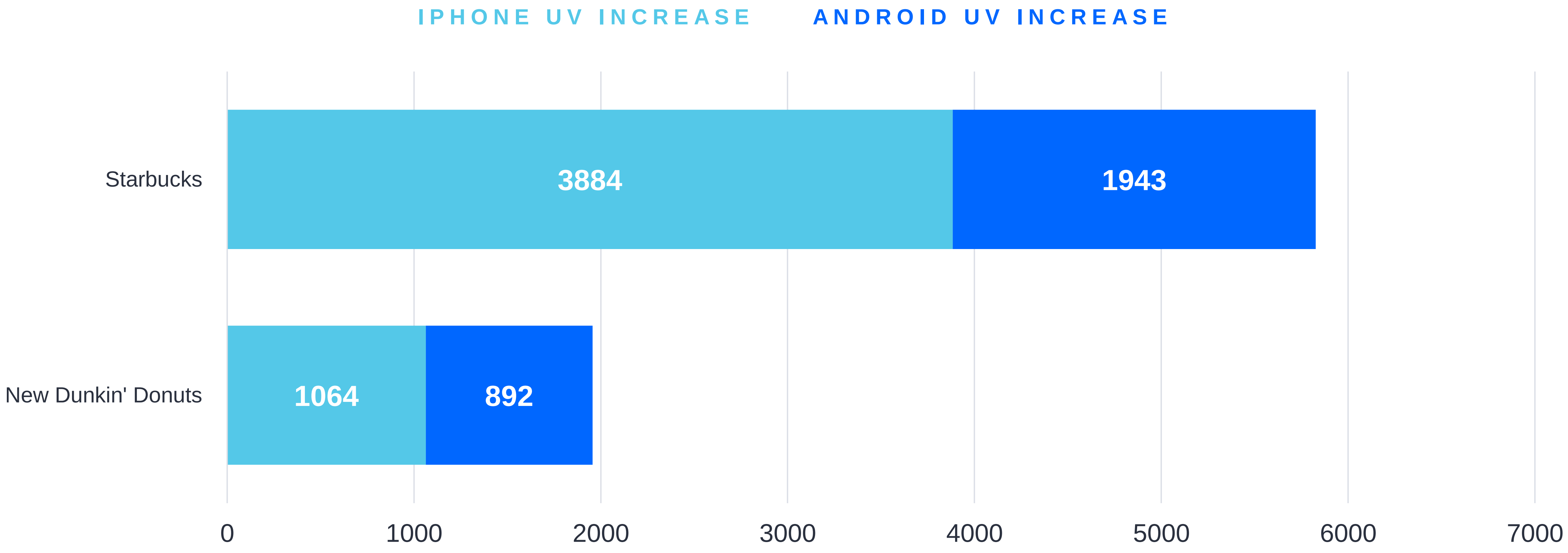
After April 2020, retailer-based food app usage has seen a bounce back up



Source: Comscore Media Metrix®, Mobile Apps Only, Select Non-Delivery Retail Food Apps, August 2020, U.S.

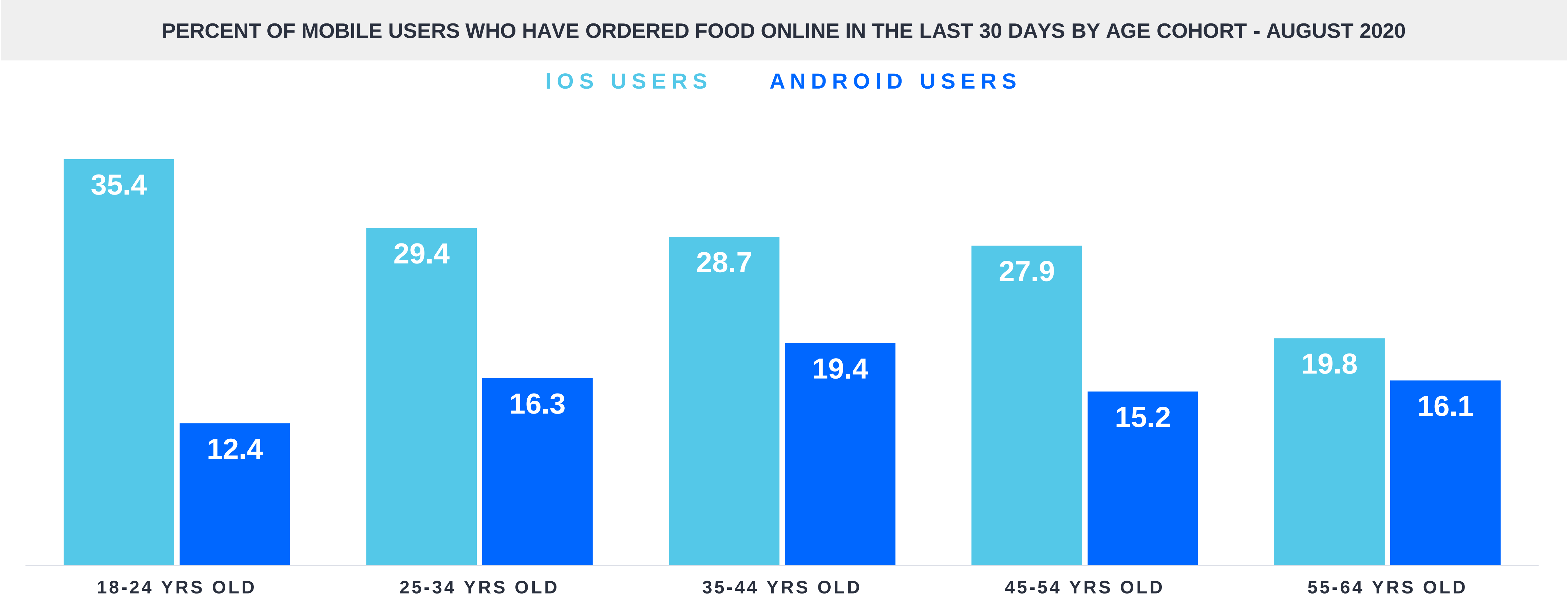
National coffee apps were one of the biggest winners post-April 2020

TOTAL CHANGE IN SMARTPHONE UVS (000) BETWEEN APRIL AND AUGUST 2020



Source: Comscore Mobile Metrix®, Mobile Apps Only, Select Non-Delivery Retail Food Apps August 2020, U.S,

Online food ordering skews younger for iOS mobile users, while Android users are mostly even across age groups

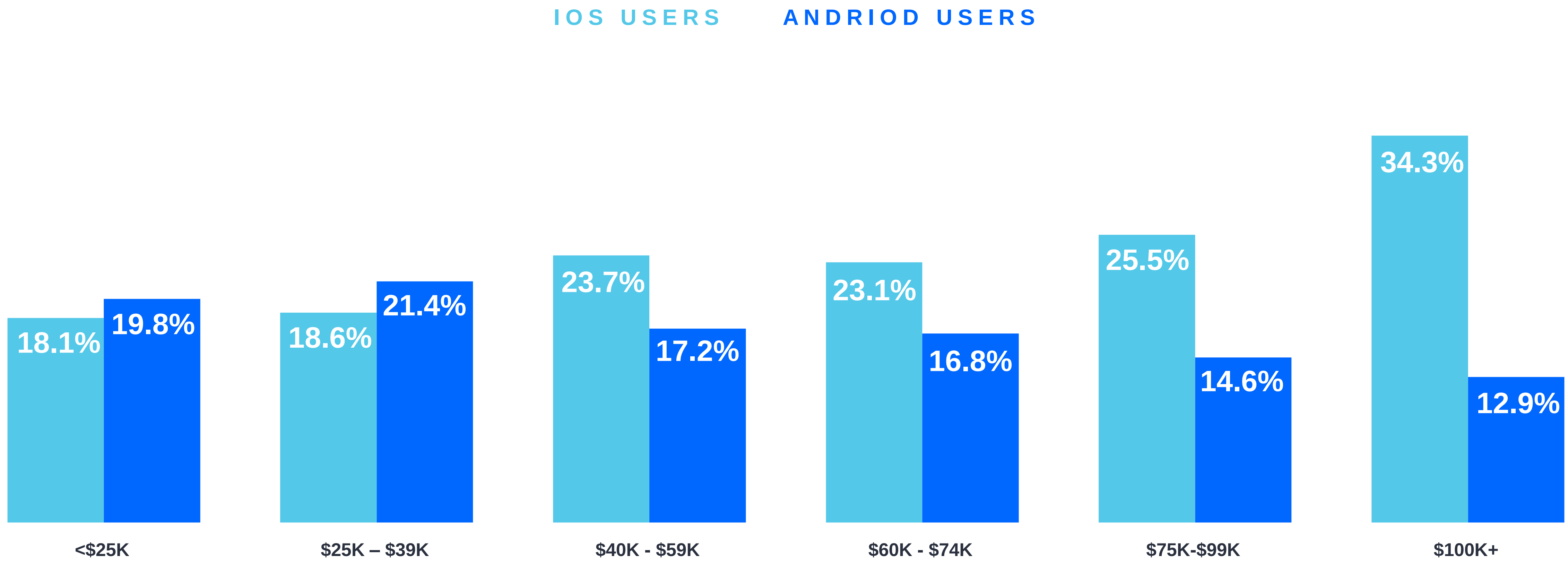


comscore

Source: Comscore Plan Metrix Multi-Platform®, Mobile, Targets: 18+, Android Smartphones or iOS Smartphones AND [Ordered groceries online last 30 days OR ordered food delivery online last 30 days OR ordered food take-out online last 30 days] , August 2020, U.S.

High income iOS users are most likely to order delivery or takeout online

PERCENT OF MOBILE USERS WHO ORDERED FOOD ONLINE IN THE LAST 30 DAYS PER HOUSEHOLD INCOME COHORT - AUGUST

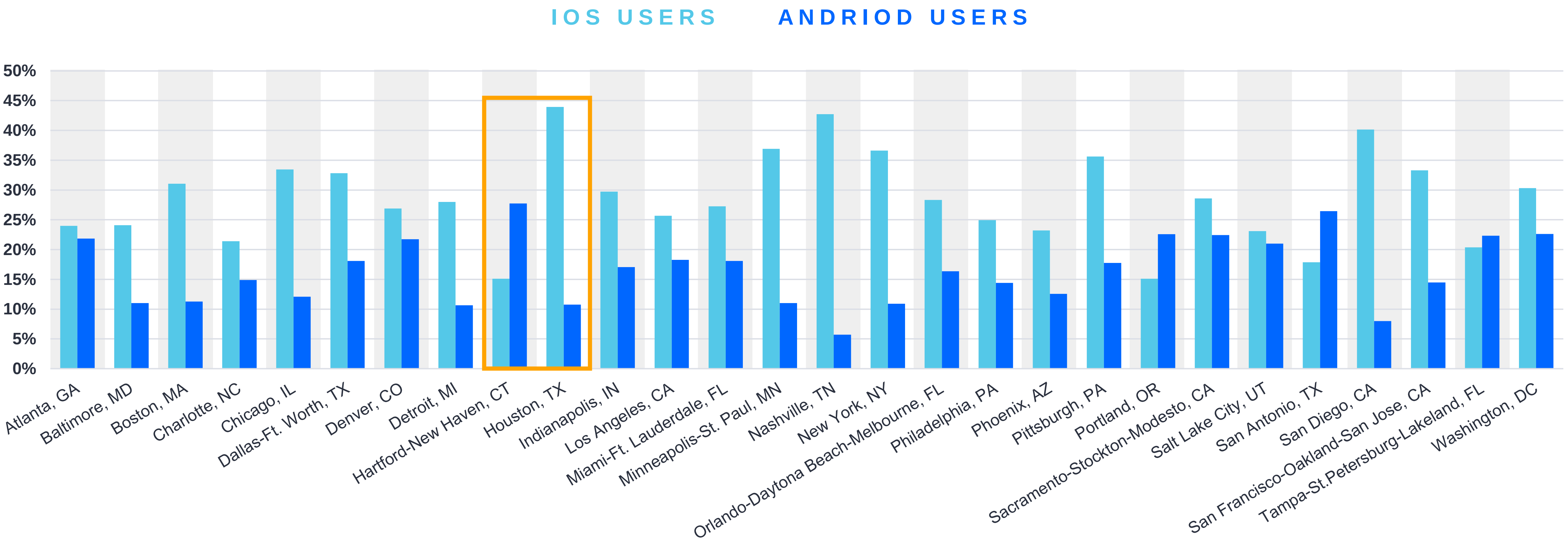


comscore

Source: Comscore Plan Metrix® Multi-Platform, Mobile, Targets: 18+, Android Smartphones or iOS Smartphones AND [Ordered groceries online last 30 days OR ordered food delivery online last 30 days OR ordered food take-out online last 30 days], August 2020, U.S.

iOS users order food online more often across major US markets, but room for online food ordering growth remains

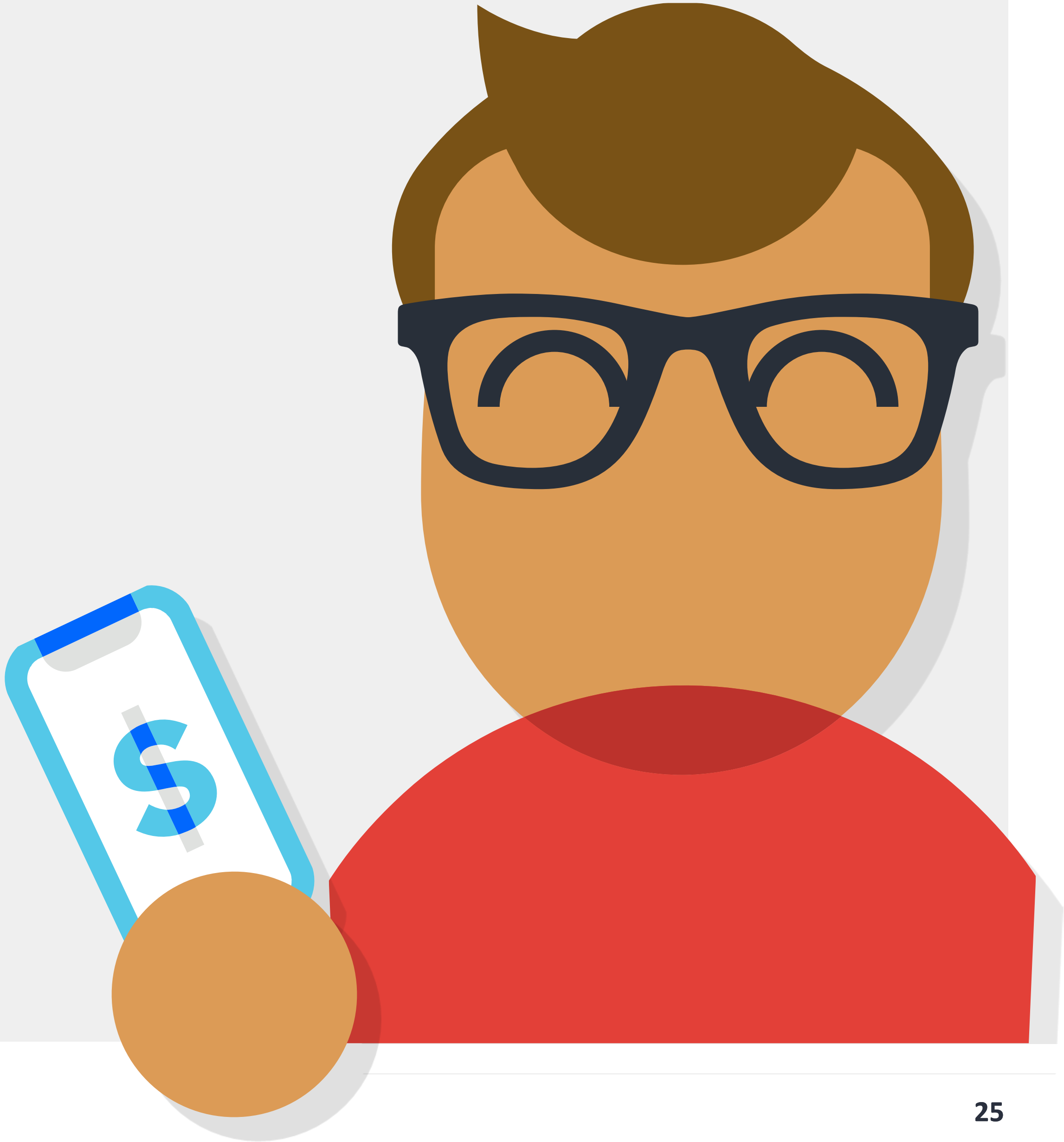
PERCENT OF MOBILE USERS WHO HAVE ORDERED FOOD ONLINE IN THE LAST 30 DAYS BY LOCAL MARKET- AUGUST 2020



Source: Comscore Plan Metrix® Multi-Platform, Mobile, Targets: 18+, Android Smartphones or iOS Smartphones AND [Ordered groceries online last 30 days OR ordered food delivery online last 30 days OR ordered food take-out online last 30 days], August 2020, U.S.

U.S. DEEP DIVE:

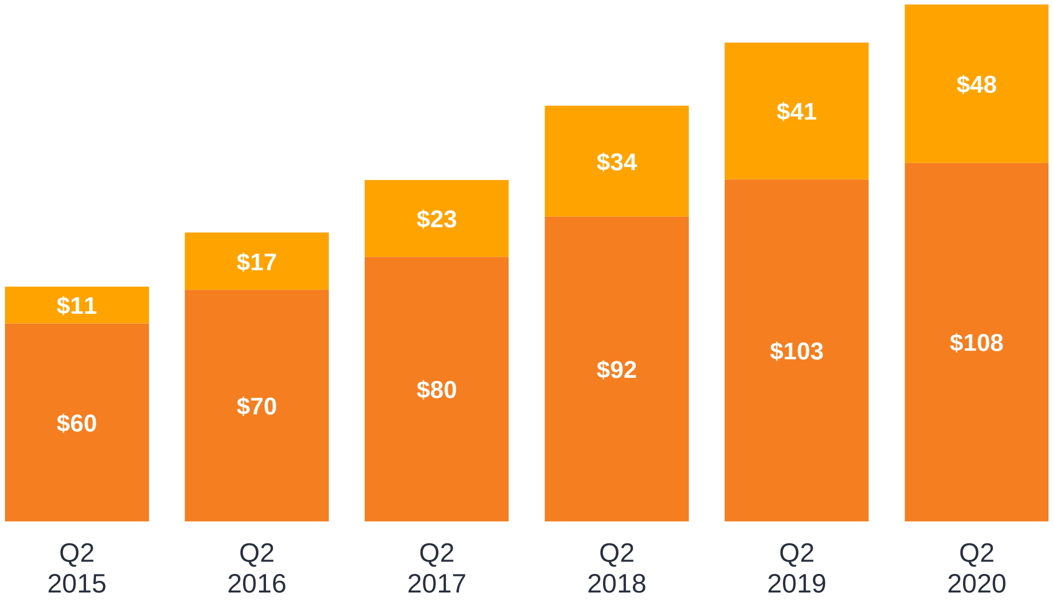
Mobile Payments



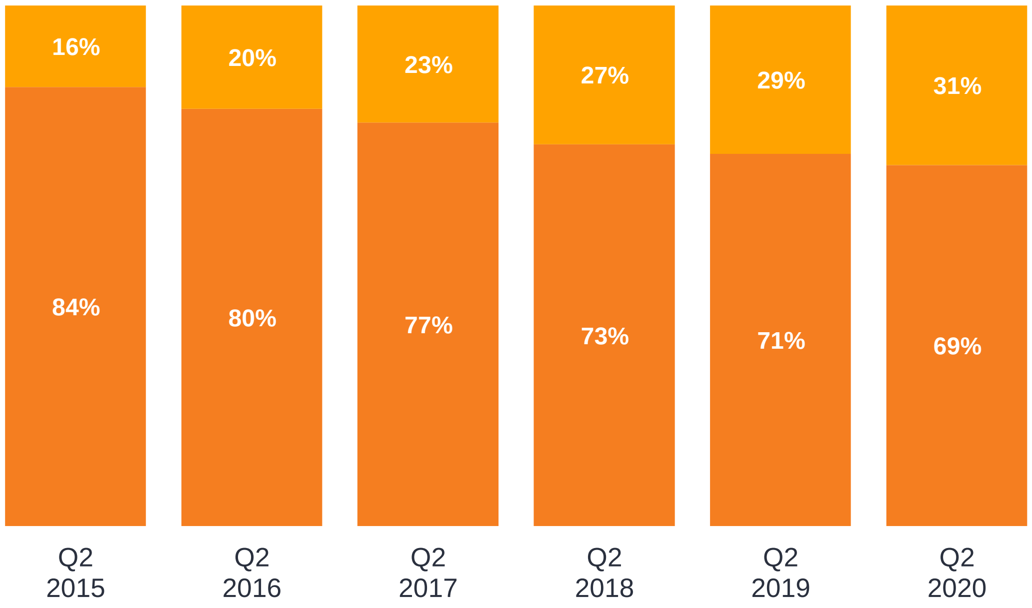
The portion of digital retail spending done on mobile has been increasing: it is now 31%

DESKTOP + MOBILE RETAIL COMMERCE DOLLAR SALES

DESKTOP MOBILE



DOLLARS SPENT (BILLIONS)

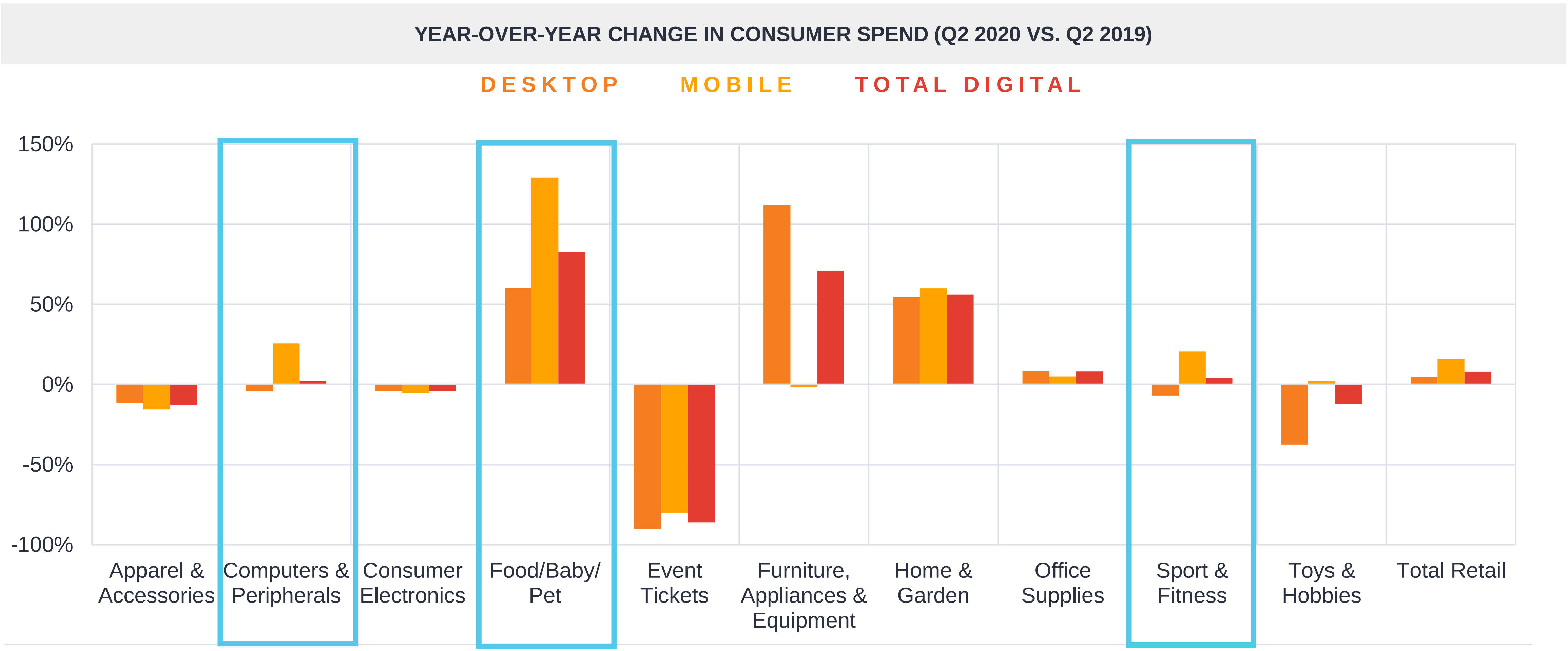


SHARE OF SPEND

comscore

Source: Comscore Digital Commerce Measurement, Q2 2015-Q2 2020, U.S.

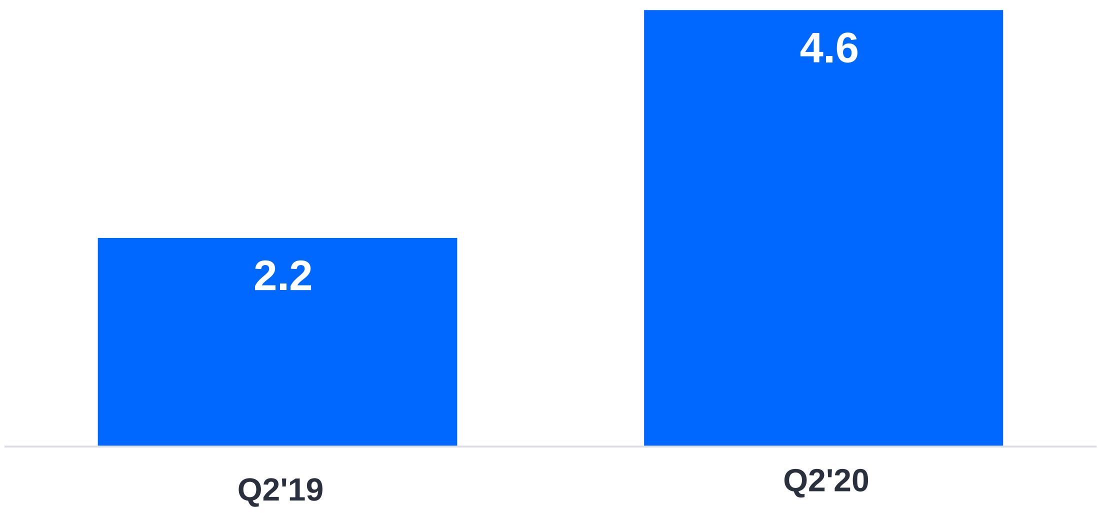
Spend on mobile shifted in 2020 to focus on different categories than in 2019



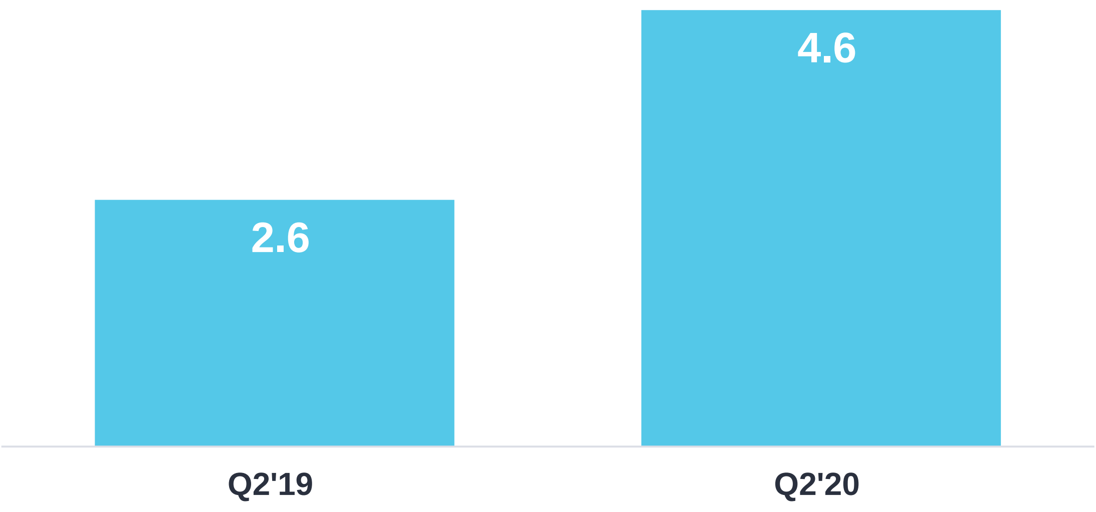
Source: Comscore Digital Commerce Measurement, Q2 2019-Q2 2020, U.S.

Mobile buyers are buying more frequently: the average number of purchases has increased

AVERAGE MONTHLY FREQUENCY OF PURCHASES ON MOBILE WEB

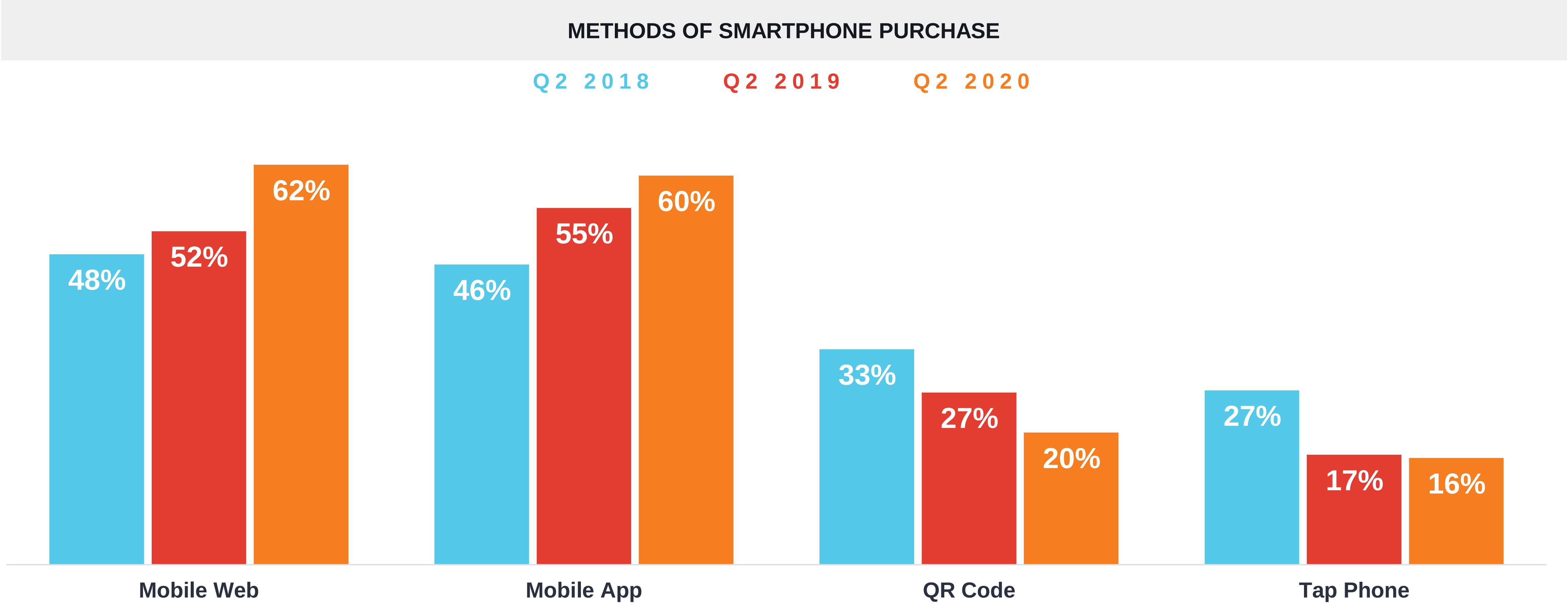


AVERAGE MONTHLY FREQUENCY OF PURCHASES ON MOBILE APP



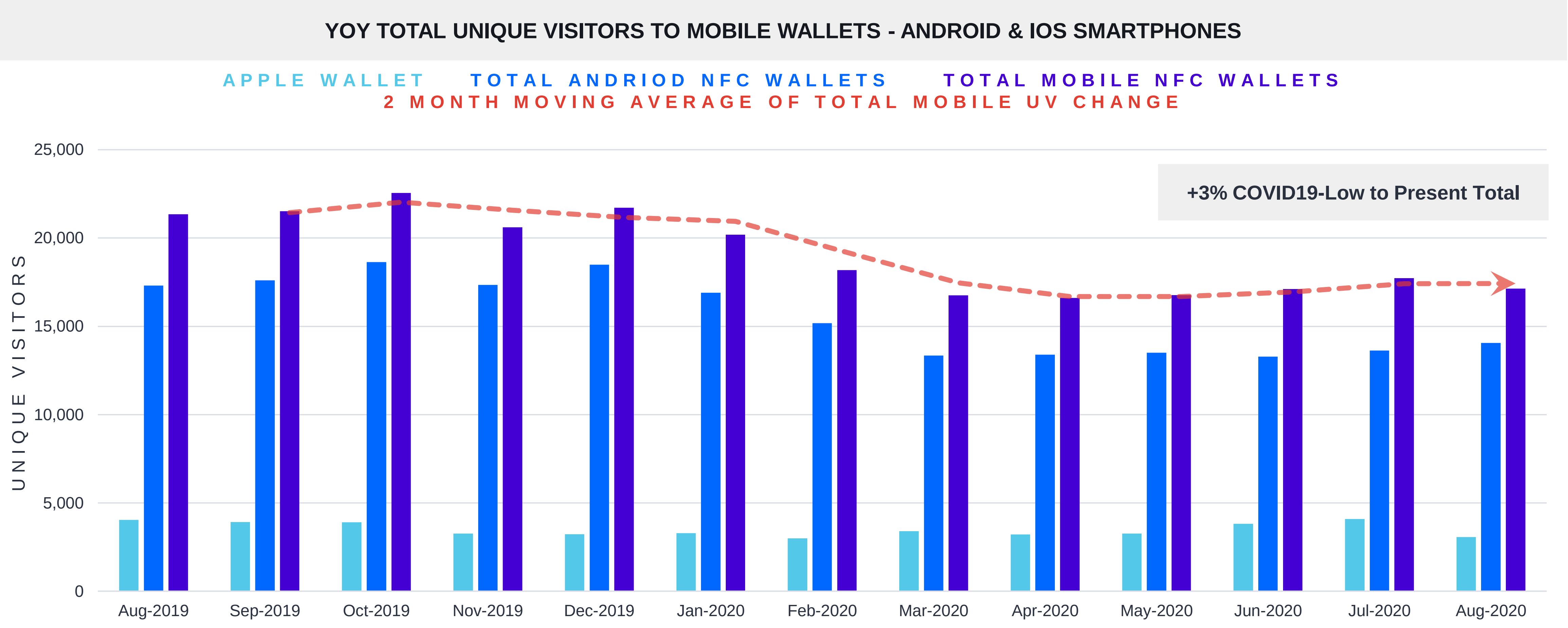
Source: Comscore Emerging Digital Payments Advisor, Q2 2019 – Q2 2020, U.S., Age 18+

Mobile buyers are increasingly using mobile apps/web instead of QR Codes/Tap to Pay, likely due to COVID-19



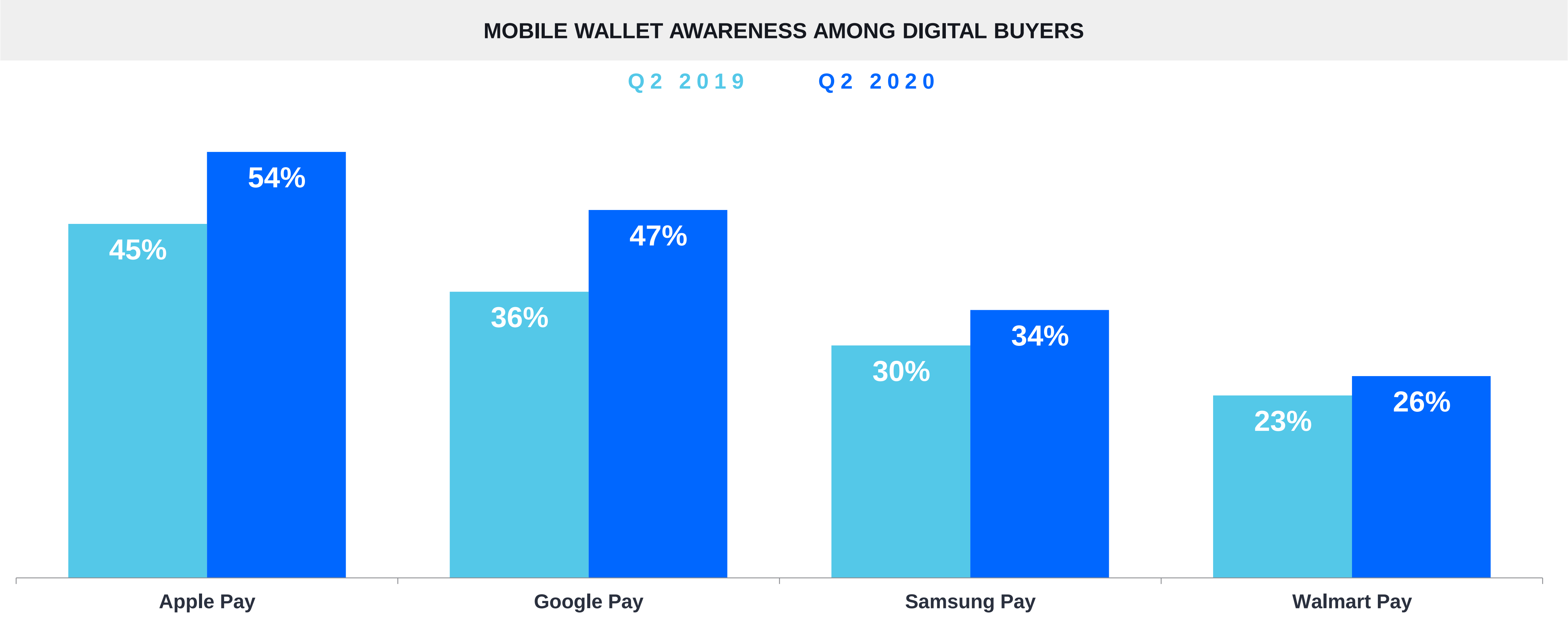
Source: Comscore Emerging Digital Payments Advisor, Q2 2018 – Q2 2020, U.S., Age 18+

NFC-enabled mobile wallets on Android maintains a significant unique visitor lead in the U.S.



Source: Comscore Mobile Metrix®, Media Trend, Total Android Wallets contains [C] Google Wallet (Mobile App) and [C] Samsung Pay (Mobile App), August 2019 to August 2020, U.S.

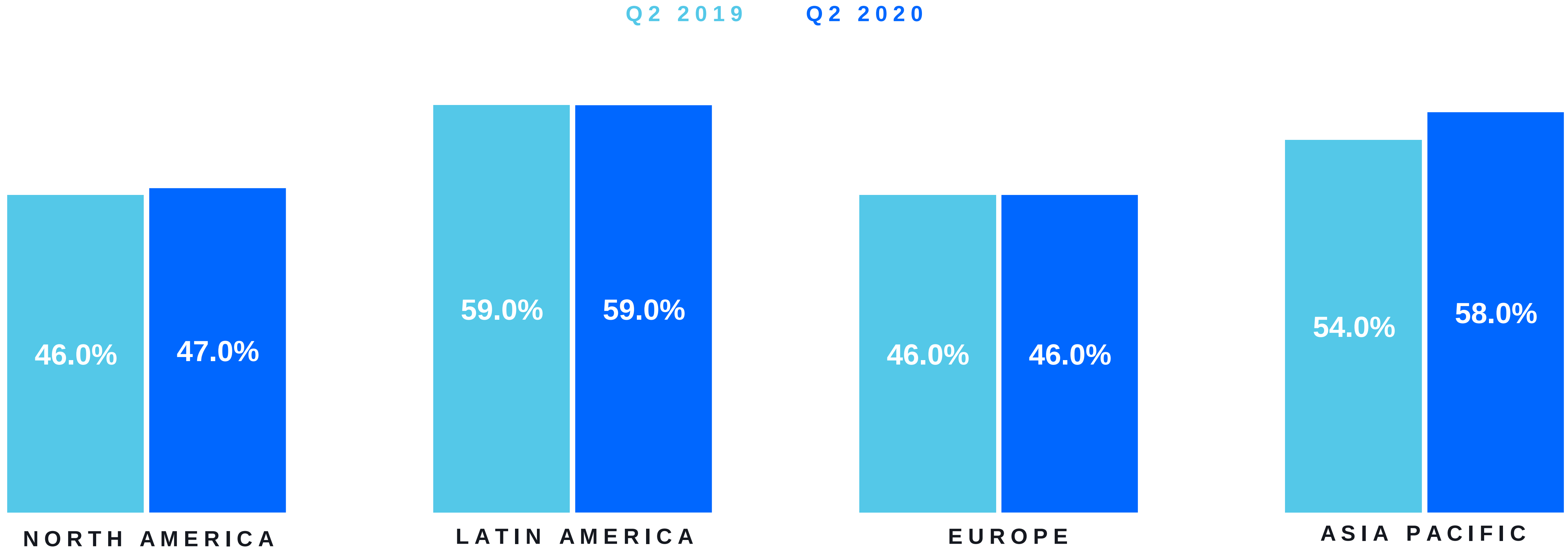
However, Apple continues to lead in awareness of mobile wallets



Source: Q2 2019 – Q2 2020 Emerging Digital Payments Advisor (EDPA)
DIGPAY1. Which of the following digital payment tools, if any, are you aware of?.
DIGPAY2. Which of the following digital payment tools, if any, have you ever used?
Indicates a significant difference at a 95% confidence level.

Stability in regional mobile share of transactions; APAC continues to gain

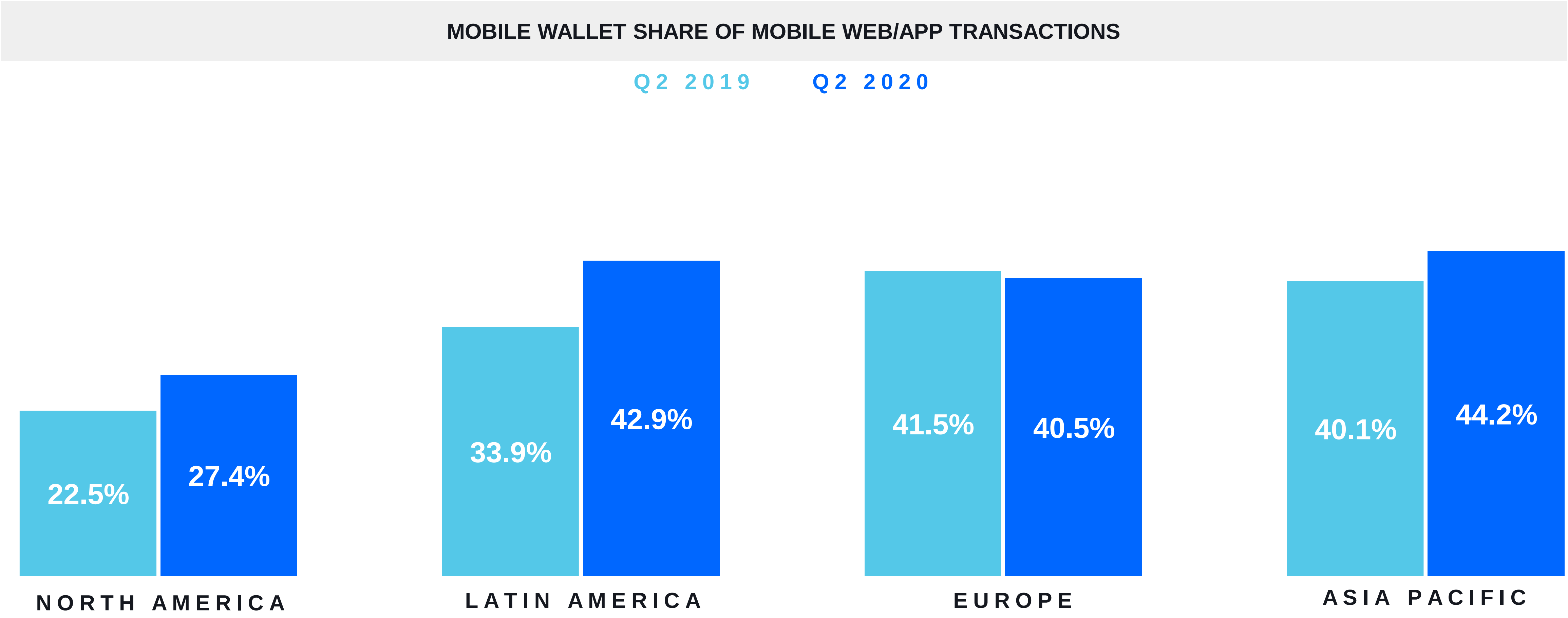
MOBILE SHARE OF ONLINE TRANSACTION



comscore

Source: Comscore Emerging Digital Payments Advisor
Graph above includes data from the US and Canada for North America, Mexico, Brazil and Argentina for Latin America, the UK, Germany, France, Italy and Spain for Europe, and Japan, India and Australia for Asia Pacific.

North America and Latin America are catching up in share of mobile transactions



Source: Comscore Emerging Digital Payments Advisor
The graph above includes data from the US and Canada for North America, Mexico, Brazil and Argentina for Latin America, the UK, Germany, France, Italy and Spain for Europe, and Japan, India and Australia for Asia Pacific.

THE FUTURE OF

Privacy & Mobile

How the marketplace is evolving for user privacy

REGULATORY ENHANCEMENTS

- CCPA, GDPR, LGPD, COPPA
- **More detailed disclosure** of personal data usage (e.g. audience targeting)
- **Enhanced systems** to trace, audit and delete information across organizations
- **Greater barriers** to measuring/acting on individual behaviors

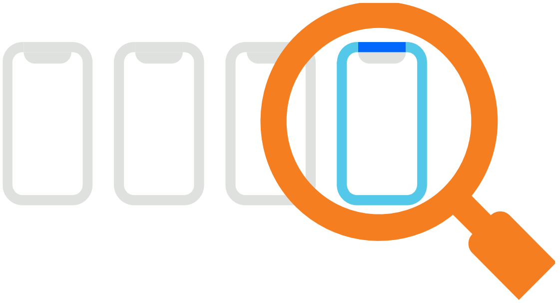
MARKET & CONSUMER CHOICES

- **More focus on privacy choices** for the consumer by digital companies across industries
- **Fewer signals** available by default to tie digital behavior to individuals
- **Heightened expectation** to know **what** is being tracked and **why**

What this means for mobile advertising and measurement

Panels Will Carry More Relevance

Data Availability Will Not be Consistent



Easy Identifiers Have a Short Shelf Life

Paths forward in a privacy-focused mobile world

Modeled Identity Resolution and Probabilistic Conversion

Contextual targeting in brand safe environments

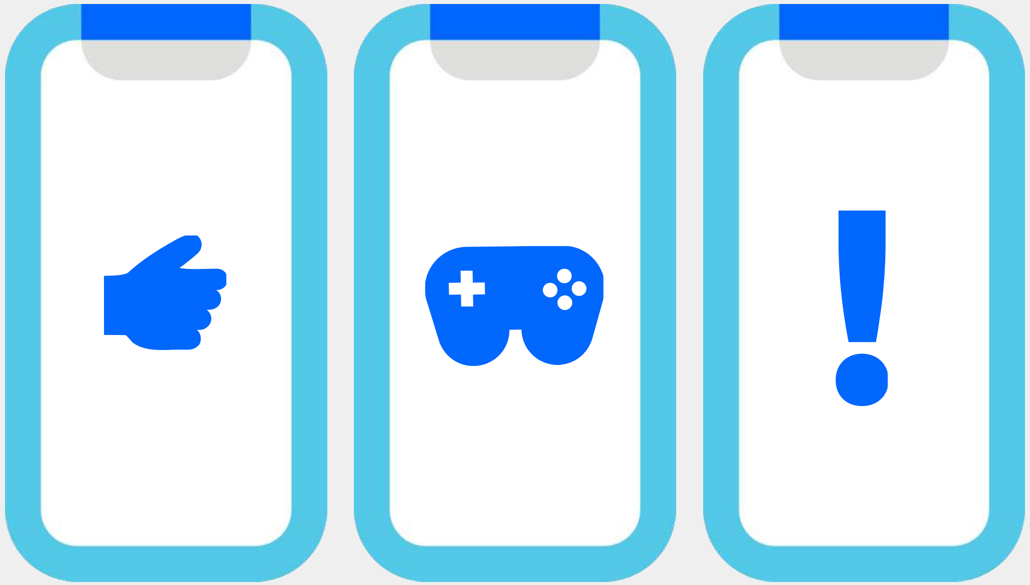
Direct partnerships with publishers

Demonstrate benefits of data sharing for the customer

Key Takeaways

1

We are seeing categorical impacts across mobile in 2020, and there will likely be continued turbulence in individual app and category performance through early 2021



2

Online video consumption continues to grow via all channels, including mobile video, desktop video, and over-the-top (OTT)

3

Mobile ordering gains were concentrated to apps prepared to serve users at home

4

Impacts from 2020 accelerated the adoption of various mobile payment methods

WEBINAR

Global State of Mobile

Kelly Lewis

Product Manager,
Digital Audience

Andrea Sangalli

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International Markets

Appendix

- **Countries represented by the worldwide rollups in this presentation include:**
  U.S., Canada, Argentina, Australia, Brazil, Chile, China, Colombia, Finland, France, Germany, Hong Kong, India, Indonesia, Ireland, Italy, Japan, Malaysia, Mexico, Norway, Singapore, Spain, Taiwan. United Kingdom, Vietnam.

- Global and U.S. data from the mobile payments deep dive uses data from Comscore's one-of-a-kind **Global Digital Payments Tracker**, which analyzes both passively observed consumer behavior from Comscore's worldwide panels and multi-platform survey data. This robust multisource approach allows Comscore to most accurately examine consumers' multi-platform payment behavior in North America (U.S. and Canada), Latin America (Mexico, Brazil and Argentina), Europe (U.K., Germany, France, Italy and Spain) and Asia Pacific (India, Japan and Australia).

REGIONS REPRESENTED BY THE GLOBAL DIGITAL PAYMENTS TRACKER INCLUDE:

NORTH AMERICA	LATAM	EMEA	APAC
U.S., CANADA	MEXICO, ARGENTINA, BRAZIL	U.K., ITALY, GERMANY, SPAIN, FRANCE	INDIA, AUSTRALIA, JAPAN

FOR ADDITIONAL INFORMATION ON HOW COMSCORE CAN HELP WITH THE ANALYSIS OF INTERNATIONAL MOBILE AUDIENCES, PLEASE CONTACT US.