Apptentive

2021 Mobile App Engagement Benchmark Report

Executive Summary

2020 reset the mobile app playing field. In response, teams across all industries need to rethink their mobile feedback and engagement strategies to meet rapidly-shifting marketplace changes.

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Almost all apps in our study experienced significant change in consumer engagement, customer retention, daily active usage, emotion-based feedback, consumer interactions, ratings and reviews, and more. These changes were driven by a variety of unprecedented factors due to the coronavirus epidemic, which catapulted mobile app downloads, usage, and corporate investment.

Consumer app usage has never been higher—and for many industries, the opportunity to win market share has never been greater. There are three focus areas for brands to prioritize in order to win in 2021 and beyond:

1. Focus on retention, not acquisition.

Prioritizing retention allows teams to lower marketing costs, improve loyalty, and save resources.

2. Turn apps into listening channels.

Mobile has become a primary—if not the only available—listening channel. Understand customer emotion by gathering, measuring, and acting on feedback to make product decisions.
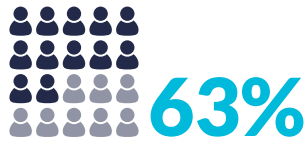
3. Go all in on personalization.

Allow consumers to direct their own journey within your mobile experience based on individual preferences.

Key Findings

2X industry average

Companies who proactively engage with consumers at the right time and place see their 90-day retention results double the industry average, which is between 20-30%.

63%

Brands shifted focus to improving long-term retention. 63% of consumers who were proactively engaged in Q1 were still seen later in the year (Q3-Q4).

50% YoY

There was a 50% year-over-year increase in the number of surveys sent, with an average response rate of 16% (industry average for survey response rates is 1%).

60%

Simply giving customers the choice to opt into or out of surveys resulted in survey response rates of 60%.

13% total shift — only 4% lost
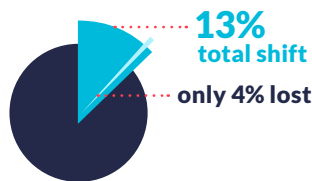
13% of consumers shifted their emotions to move between Fan and Risk audience segments. Brands only lost an average of 4% of consumers in this group thanks to precise segmenting and proactive, personalized outreach.

changing app trends

Almost all apps experienced significant change in their DAU due to COVID-19. Three main trends took place: massive drops, huge spikes, and higher frequency of app usage.

What's Inside

Jump ahead by using the links below.

Methodology

Apptentive's annual mobile app engagement benchmark report serves as a baseline to help app publishers across categories understand their app's engagement strengths and areas for improvement. The report was created for companies seeking to understand how their customer feedback and engagement metrics stack up against their marketplace. This is our sixth consecutive year conducting this research. Data from our 2020, 2019, 2018, 2017, and 2016 reports are included to show shifts in brand focus and engagement over time.

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The data in this report is from 1,000 iOS and Android apps with 5,000+ active users across the following app categories: Business Services, Education, Finance, Food and Drink, Healthcare, Media and Entertainment, Personal Services, Shopping, Travel, and Utilities. Data was gathered from over a billion app installs. All apps included in the data are Apptentive customers. All data for Android apps are global. Ratings data for iOS apps are US-only. Phrases are in English.

The data ranges from January 2020 through December 2020. In most scenarios, we've used raw data over aggregates. App aggregates ensure large apps don't skew numbers, but the risk of data skewing was neutralized based on our pre-qualification of included apps. Unless otherwise noted, the overall numbers shown in this report includes total raw numbers.

Throughout the report, you will see blended data (combined iOS and Android) and data broken out by operating system, noted accordingly.

Disclaimer: We'd be remiss to not call out potential correlation rather than causation in the report data. Although reflective of the broad app marketplace, the data is inherently biased as Apptentive's best practices include making sure consumers have used an app for a period of time before engaging them, and the data in this report only includes Apptentive customers.

2020 Mobile Landscape at a Glance

record app usage

In 2020, there was a record **218 billion app downloads** and **$143 billion in mobile app store spend**. (App Annie, 2021)

Regarding the impact of the crisis on a range of measures, executives say that **funding for digital initiatives has increased more than anything else**—more than increases in costs, the number of people in technology roles, and the number of customers. (McKinsey, October 2020)

2-3 years' growth

2020

Effectively, **2020 was a breakout year for mobile apps**. At the height of the pandemic, our mobile usage skyrocketed—**accelerating mobile adoption by 2-3 years in just a few months**. (App Annie, 2021)

up 15%

The COVID-19 lockdowns were a huge boon for many app categories, with spiked demand for apps that could bring goods, services, and real-world activities into people's homes. But as economic recovery progressed and lockdown restrictions were lifted, many spikes turned out to be short-lived. Downloads generally fell back to normal levels, although **overall demand was still slightly higher ending 2020 than in 2019**. For example, **Grocery apps are up 15% year-over-year** after initially rocketing up 306%. (Marker, 2020)

27% **24%**
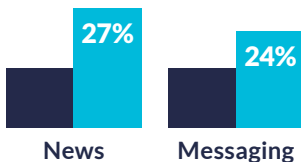
News **Messaging**

But COVID-19 did create lasting changes. The App Store categories of News and Messaging have maintained far more of their COVID-19 acceleration with downloads for **News apps still up 27%** and **Messaging apps up 24%** year-over-year. (Marker, 2020)

accelerated 194%
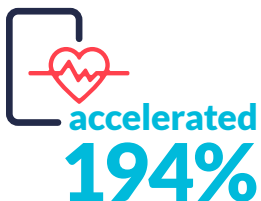
Mobile consumer behavior was forever impacted by our experiences in 2020, with some changes that have catapulted entire industries forward (while others, like Travel, ground to a halt). For example, **demand for Healthcare apps jumped 126%** year-over-year during the onset of Covid-19, and has since accelerated even further nearing the end of the year, **now up 194%** compared to 2019. (Marker, 2020)

Macro Mobile App Trends

Apptentive

Mobile Consumer Sentiment

> **"** *Just having satisfied customers isn't good enough anymore. If you really want a booming business, you have to create raving fans."*
>
> **KEN BLANCHARD**
> Author and Business Consultant

Gauging sentiment starts with understanding customer emotion. Apptentive's **Love Dialog** feature is used to gather the data, which starts with a simple "yes" or "no" question: **"Do you love our company?"**
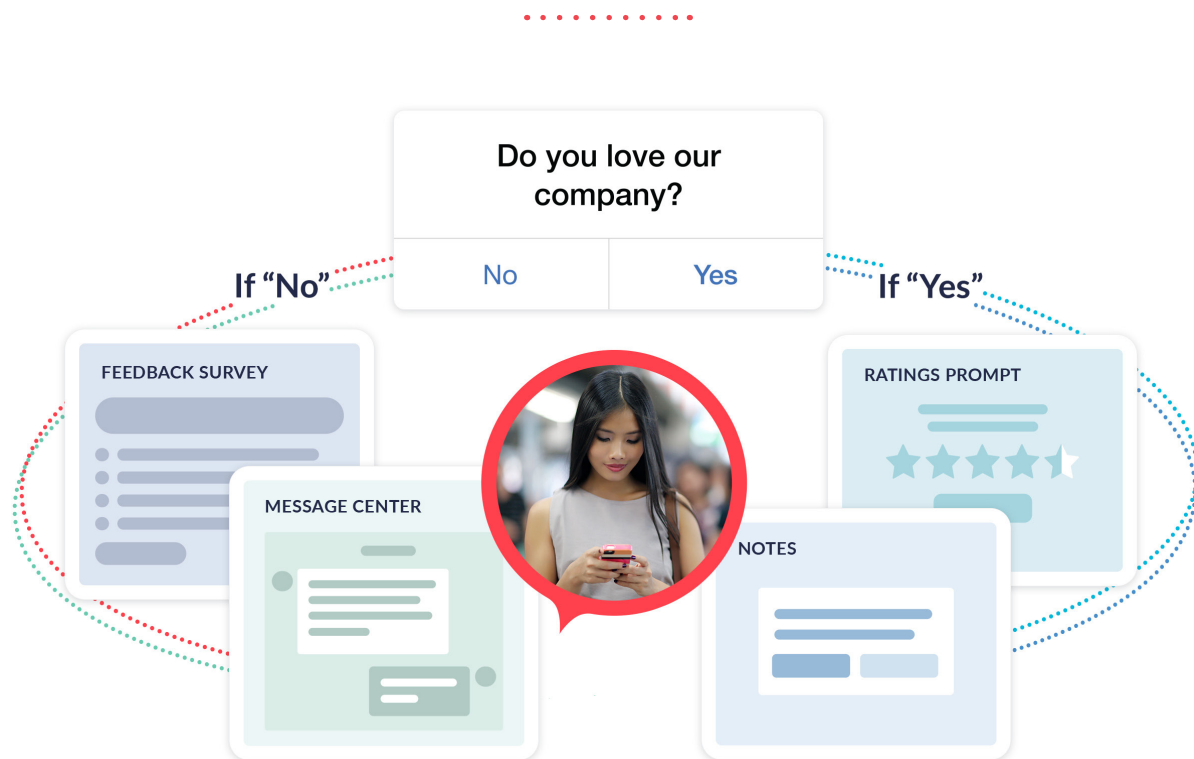
2020 Love Dialog Conversion Rate

Consumers who responded "Yes" or "No" to Love Dialog prompts

. . . .

Blended	93%
	97%
	84%

In 2020, **93% of all consumers who were prompted by a Love Dialog responded "Yes" or "No"** rather than closing out of the prompt. On iOS, the number was even higher at 97%, compared to 84% of consumers on Android. The Love Dialog garners such high response rates primarily because of its simplicity. People are willing to answer short, simple questions and share feedback when they're proactively asked for it at the right mobile moment.

2020 Love Percent

Total consumers who respond "Yes" to Love Dialog prompts

. . . .

Blended	65%
	62%
	68%

Let's focus on the people who responded "Yes." **In 2020, 65% of consumers prompted responded that "Yes," they loved the brand.** These quick, positive responses are a great way for brands to take a regular emotional pulse from their consumers, without asking them to leave the app for feedback or take another step away from their intended use of the app. They're also a much better indicator of consumer happiness and potential lifetime value than lagging metrics like NPS.

Comparing churn risk for people who responded "Yes" (a brand's Fans) and people who responded "No" (a brand's Risks) tells another compelling story. We would expect to see people who say they love the app remain active longer because they are happy, and people who said they do not love the app drop off quicker due to a problem. **But the risk of churn to both Fans and Risks is comparable.** This can be explained by brands giving both happy and unhappy customers a voice to express their emotions directly within the app. As soon as someone says they're unhappy, they're able to share why directly to the company. This insight allows mobile product teams to understand the concern and adjust their product roadmap so the experience can be fixed, ultimately saving the relationship with the consumer.

2020 Retention Rates for Fans and Risks

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90-day Retention

Fans	75%
Risks	73%

Annual Retention

Fans	54%
Risks	50%

Expressed Sentiment

> **"** *Agile marketing requires a single, unified organizational view of the customer, which can be gained through a customer data platform. It's upon the CMO to help the C-suite articulate a vision that brings these tools to life to engage with and respond to customer needs as they develop."*
>
> **PETER SEDIVY**
> Deloitte Analyst

Measuring **customer emotion and sentiment** helps brands build first-party data profiles and offer more personalized digital experiences. We capture emotion data through **Fan Signals™**, which allows your brand to measure expressed sentiment across time and touchpoints, helping you identify when sentiment has shifted and why—down to individual customer IDs.

To measure emotion data, consumers are grouped into six segments:

New Fans:
Customers who have expressed positive emotion for the first time

New Risks:
Customers who have expressed negative emotion for the first time

Reclaimed Fans:
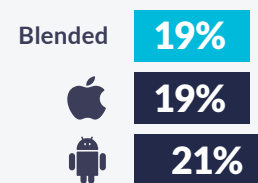Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Repeat Fans:
Customers who have expressed positive emotion at least twice in a row

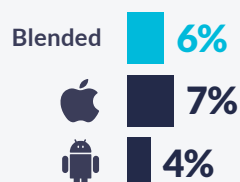**Repeat Risks:**
Customers who have expressed negative emotion at least twice in a row

Lost Fans:
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Consumers were eager to express emotion in 2020. **The majority of consumers (65%) identified as Fans** when they were prompted for feedback. If you can keep happy people happy, their lifetime value will increase. But this also results in a bigger bucket of consumers who can shift from Fan to Risk.

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Each segment outlined below should be treated differently based on how people have self-identified their emotions. For example, people in the Risks segments should be stopped from churning however possible, but reducing churn looks different depending on the segment—down to the consumer's individual experience. Simultaneously, you should not ignore the people in Fans groups who have had a good experience; you should continue understanding how they feel, tailoring their experiences and your interactions with them based on the emotions along their lifetime to ensure continued happiness. Listening to and acting on feedback from all segments is key to truly harnessing the power of customer emotion.

Expressed Consumer Emotion by Segment in 2020

New Fans
(Customers who have expressed positive emotion for the first time)

Blended	34%
(Apple)	31%
(Android)	42%

Repeat Fans
(Customers who have expressed positive emotion at least twice in a row)

Blended	25%
(Apple)	26%
(Android)	21%

New Risks
(Customers who have expressed negative emotion for the first time)

Blended	19%
(Apple)	19%
(Android)	21%

Repeat Risks
(Customers who have expressed negative emotion at least twice in a row)

Blended	10%
(Apple)	11%
(Android)	7%

Reclaimed Fans
(Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan)

Blended	6%
(Apple)	7%
(Android)	4%

Lost Fans
(Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk)

Blended	7%
(Apple)	7%
(Android)	5%
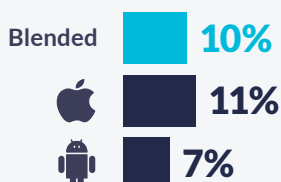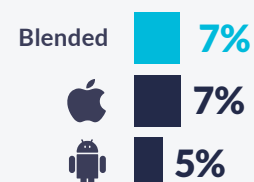
Perhaps the biggest takeaway is that **most people don't shift their emotions—but when they do, brands can help proactively influence the outcome.** In 2020, 13% of consumers shifted their emotions (Reclaimed Fans and Lost Fans). On average, brands lost 4% of the 13% of consumers in the shifted emotions group. The reality is that companies will lose customers, and that people will not be happy all the time. Brands who tap into this segment of shifting emotions to understand why people are unhappy and to fix what went wrong ultimately have an advantage over brands who can't quantify consumer experience in the same way.

Shifted Emotions in 2020

Blended	**-4%**
	-4%
	-7%
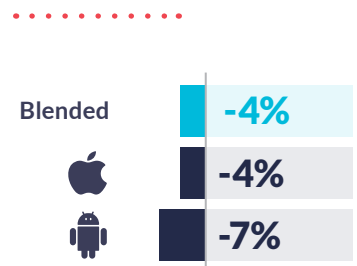
Winning brands have moved away from using passive, lagging indicators (like NPS) to measure consumer satisfaction. Instead, their focus is now on fluid, comprehensive metrics like Love Percent and Expressed Sentiment to holistically understand the voice of the customer. By keeping a constant pulse on emotion through regular check ins and proactively asking for—and acting on—feedback, brands are able to enhance first-party customer data, better understand customer journeys, and deliver product enhancements that can actually be tied to longer lifetime value, improved consumer happiness, and more revenue.

Editor's note: Expressed Sentiment data is based on aggregates.

Retention

> ❝ *If your retention is poor, then nothing else matters."*
>
> **BRIAN BALFOUR**
> Founder/CEO, Reforge,
> former VP of Growth, Hubspot

In a year where little was the norm, brands were forced to get creative in revisiting their mobile engagement strategies—**and the focus was clearly on retention, not acquisition.** Retaining customers tends to cost less than acquiring new ones and offers additional benefits through improving overall lifetime value. Retention can also be used as a trust signal around how well your brand knows its customers.

However, retention doesn't look very good for the average mobile app. According to research from Appsflyer and MixPanel, average 90-day retention for mobile apps across categories is somewhere between 20-30%—not that great.

Apptentive's data shows a different pattern based on brands who were proactive rather than leaving retention to chance. **In 2020, mobile teams who proactively engaged with consumers saw their 90-day retention results double the industry average.**

63%
of consumers who saw an interaction in Q1 were seen later in Q3-Q4

Improving short-term retention is critically important, but many brands have harnessed the power of their first-party customer databases to expand their focus toward long-term retention. Our data shows that **of the consumers who used an app and saw an interaction in Q1, 63% were seen later in the year (Q3-Q4)**. Because interactions are based on regular cadences, this data tells that when you take the time to engage with customers in order to understand how they feel, it's likely you will keep them around longer.

2020 Monthly Consumer Retention

Subsequent Months	0	1	2	3	4	5	6	7	8	9	10	11
January	100%	66%	59%	48%	47%	46%	44%	43%	40%	38%	36%	35%
February	100%	67%	52%	50%	49%	47%	45%	43%	40%	38%	37%	
March	100%	58%	54%	51%	49%	47%	44%	42%	40%	38%		
April	100%	66%	60%	56%	54%	50%	47%	45%	43%			
May	100%	66%	61%	56%	53%	49%	47%	44%				
June	100%	67%	61%	56%	52%	49%	46%					
July	100%	66%	59%	54%	51%	48%						
August	100%	65%	58%	54%	50%							
September	100%	64%	58%	54%								
October	100%	65%	59%									
November	100%	67%										
December	100%											

Let's focus on annual retention, an app metric that is generally not reported on due to the acceptance of regular, high consumer churn. Across all apps, 35% of consumers who used the app in January were seen in December. **If the consumers saw an interaction in January, 50% were still seen in December—an improvement of 43%.**

> **50%**
> of consumers who saw an interaction in January were still seen in December

These huge year-over-year mobile consumer retention gains can be explained by four actions:

1. Actively communicating with customers before they get a chance to churn decreases overall churn.
2. Proactively caring about consumer experience provides a longer runway for brands to prove value and drive loyalty.
3. Giving customers a voice in deciding what goes on a brand's product roadmap helps resource-stretched teams build features that both drive business goals and keep customers happy.
4. Measuring and acting on emotion data allows brands to better understand customer sentiment and make changes accordingly.

Interaction and Response Rates

> ❝ *We have been investing and planning the capability to support this [online] volume. We just thought it would be three years from now. So we have seen an acceleration for what we would have expected to take three years that has now happened in a matter of weeks."*
>
> **MICHAEL FIDDELKE**
> CFO, Target

The pandemic had a major impact on mobile interaction and response rates. As lockdowns began and consumers shifted digitally, **apps experienced spikes in their MAU, particularly in March through June**.

Mobile teams did an excellent job shifting to get in front of consumers during the beginning stages of the pandemic. **Companies used their apps to engage more regularly with consumers as mobile became a primary—if not the only—way for them to communicate.** In response, consumers interacted with more with brands through their apps.

COVID's Impact on Monthly Interactions

Interaction Rate:
— Blended
— iOS
— Android
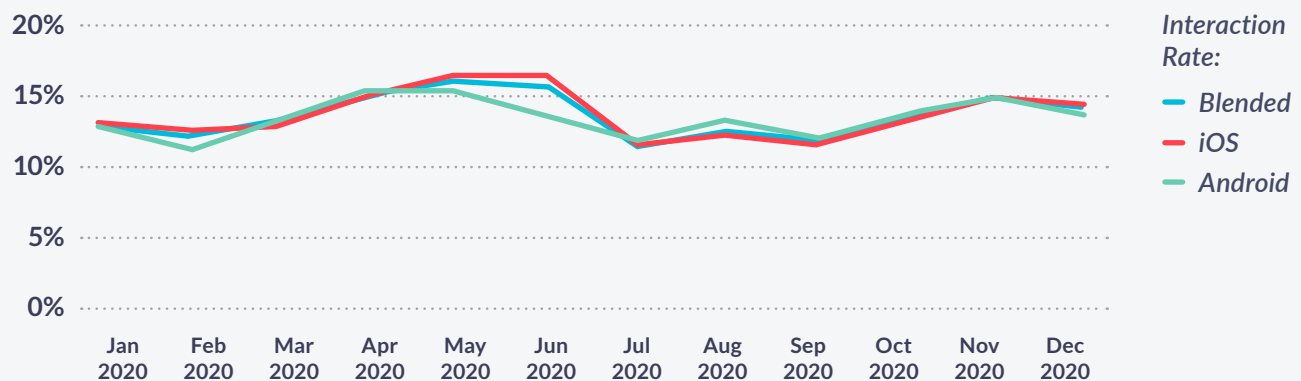
COVID's Impact on Monthly Response Rates
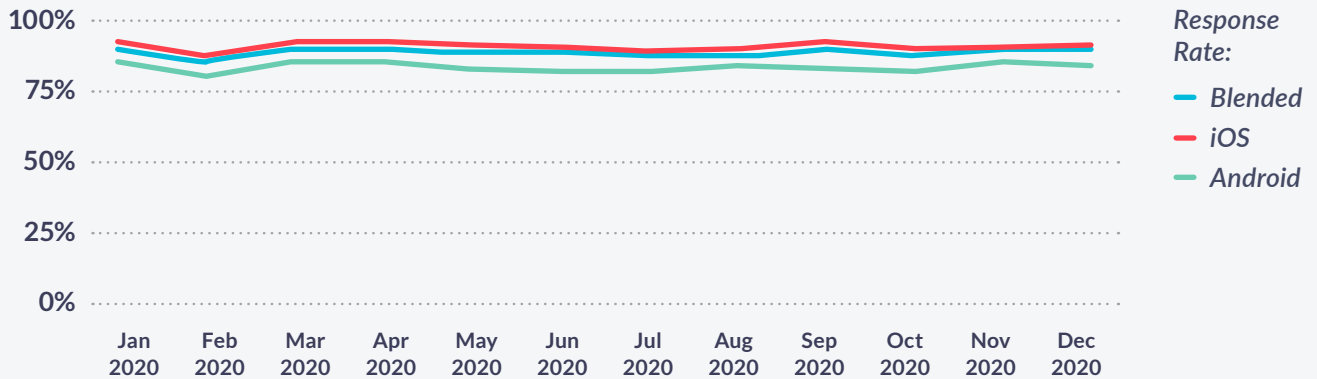
At year end, **interaction rates remained steadily higher than they were in 2019**, rising from 24% to 26%. The **average response rate to in-app interactions was a shockingly high 92%**—which means that the overwhelming majority of consumers who were interacted with responded to the brand's outreach.

2020 Average Interaction Rate
Engagements sent to consumers from brands

2019   **2020**
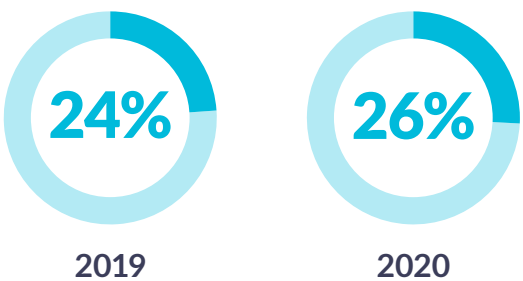
2020 Average Response Rate
Responses to consumers from brands

2019   **2020**
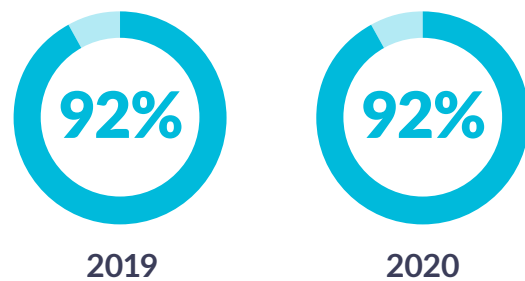
Ratings and Reviews

> **"** *If you make customers unhappy in the physical world, they might each tell six friends. If you make customers unhappy on the Internet, they can each tell 6,000 friends."*
>
> **JEFF BEZOS**
> Founder & former CEO,
> Amazon

Ratings and reviews have real consequences on conversion rates and <u>brand reputation</u>. When we asked, consumers were clear that the lower the star rating, the less likely they'd be to download the app. The opportunity cost of a star is huge. Moving a three-star app to four stars, for example, can lead to an **89% increase in conversion**.

Across the apps included in our study, the **average star rating was 4.31**. Apps had an **average 88,871 star ratings**, and an average **1,400 number of app store reviews**.

Minimum Star Rating needed for Consumers to Download an App

% of consumers willing to consider downloading an app
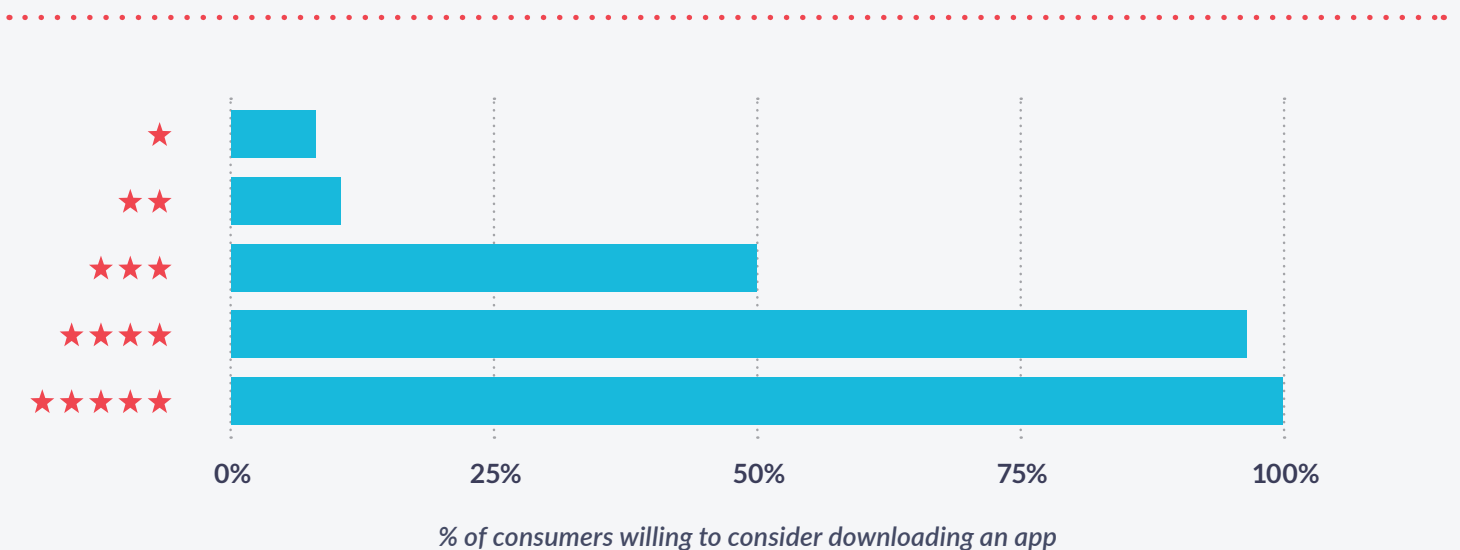
2020 Ratings and Reviews Benchmarks

Average Number of Ratings

150k
100k
50k
0
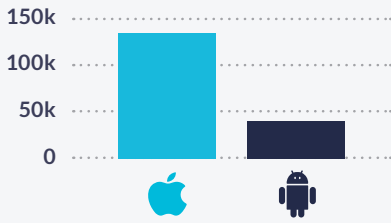
Average Star Rating

★★★★⯪

★★★★☆

Average Number of Reviews

455

2,586
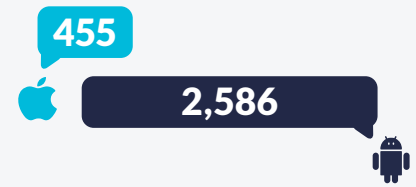
However, it's challenging to compare apps across categories due to differences in consumer behavior, particularly when it comes to ratings and reviews. Comparing apps to others in their industry yields a more accurate picture of performance. Apps across categories saw changes to their total **distribution of star ratings in both app stores**. Here is the 2020 distribution across both iOS and Android, by app category.

2020 App Store Ratings by App Category: iOS

	★	★★	★★★	★★★★	★★★★★
Business Services	5%	1%	3%	11%	80%
Education	4%	1%	4%	11%	80%
Finance	6%	2%	3%	11%	78%
Food and Drink	3%	1%	3%	11%	82%
Healthcare	5%	1%	4%	11%	79%
Media & Entertainment	11%	3%	5%	14%	67%
Personal Services	3%	1%	3%	12%	81%
Shopping	5%	1%	3%	11%	80%
Travel	3%	1%	3%	11%	82%
Utilities	4%	1%	3%	20%	72%

2020 App Store Ratings by App Category: Android

	★	★★	★★★	★★★★	★★★★★
Business Services	19%	4%	5%	12%	60%
Education	21%	3%	5%	11%	60%
Finance	13%	3%	3%	11%	70%
Food and Drink	18%	3%	5%	13%	61%
Healthcare	19%	5%	6%	13%	57%
Media & Entertainment	18%	4%	6%	13%	59%
Personal Services	17%	3%	4%	14%	62%
Shopping	9%	3%	4%	13%	71%
Travel	15%	3%	5%	15%	62%
Utilities	17%	4%	4%	12%	63%

Consumer behavior and expectation are at the heart of most cross-category ratings fluctuations. For example, consumers tend to be more satisfied brands in categories without a lot of singular competition, like Finance. People typically only are members of one bank, so while the marketplace is crowded, it's hard for individuals to easily jump to competitors. Consumers also tend to let bias around current events influence their public ratings (more on why this is bad and how to get ahead of it), a common occurrence in Media and Entertainment. We detail more category-specific differences later on in the report.

Here is the distribution of the **average number of app store reviews**, by app category.

2020 Average App Store Reviews by App Category

		🤖
Business Services	368	1,223
Education	197	309
Finance	104	960
Food and Drink	1,223	4,695
Healthcare	435	1,169
Media & Entertainment	580	2,619
Personal Services	691	2,226
Shopping	488	7,549
Travel	381	1,335
Utilities	319	1,223

The **average number of reviews** in both iOS and Android hasn't fluctuated much year over year. In general, there have always been more reviews in Android than in iOS, mostly due to the demographic differences of their customer bases. Android users tend to be younger and much more likely to feel involved in the process. Because of this, they're also typically more critical (e.g. give lower ratings and more critical reviews). And since the **release of iOS 11**, we've also seen a downturn in the number of iOS reviews as the rating process was simplified.

2020 Average Volume of App Store Reviews
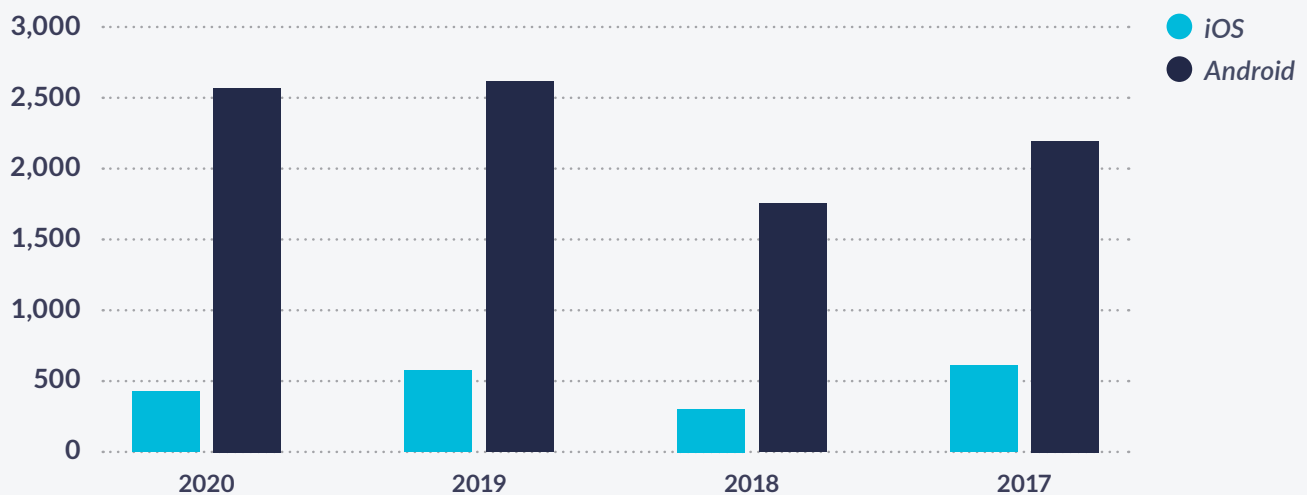
Ultimately, the ratings data tells us ratings and reviews continue to play a major role in your app's growth long after consumers have found their way to your app store product page. They serve as social proof to indicate your app's quality in an otherwise blind evaluation process. And in both app stores, review recency matters more than ever before, which means being able to identify and activate your fans is critical.

For more on improving your app's ratings and reviews, check out our guide **Mobile App Ratings and Reviews: Where to Start and How to Win**.

Editor's note: Ratings data is based on aggregates.

Surveys and Messages

> " *Surveys are the only qualitative source of info we really have about our customers—they are invaluable. It's so huge for us to be able to better understand the impressions and sentiment that our customers have of/towards us."*
>
> **CHRIS MURRAY**
> TMZ

Mobile surveys are powerful in understanding sentiment, but only if they're shown at the <u>right place and time within the app</u>, to the right consumer segment. Through mobile, short surveys with specific asks (like feedback on a new feature) are effective and efficient.

There was a **50% increase in the number of surveys sent** in 2020 from 2019. COVID restrictions catapulting mobile engagement was a likely driver behind the increase, along with mobile teams getting more comfortable talking with their consumers on a regular basis.

2020 In-app Surveys Sent

Year	
2020	66,888,932
2019	44,849,700
2018	34,867,512
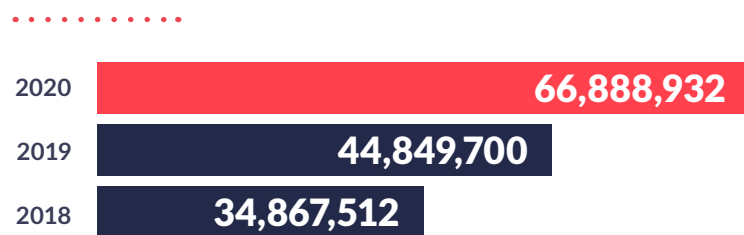
Let's look at survey response rates. An important distinction is that, on average across industries, most brands only hear from ~1% of their customers surveyed. However, the **average response rate for in-app surveys in our research was 16%.** Although this year's response rates were slightly lower than in 2019 (18%), they're an off-the-charts comparison to the industry standard of 1%. The main factor behind the slight drop was to whom brands survey. Many companies broadened their survey audiences this year in response to huge usage increases (particularly in Q2). The less targeted surveys are, the lower the response rates will be.

2020 Response Rate for In-app Surveys

Survey Responses by OS

🍎 16%

🤖 17%
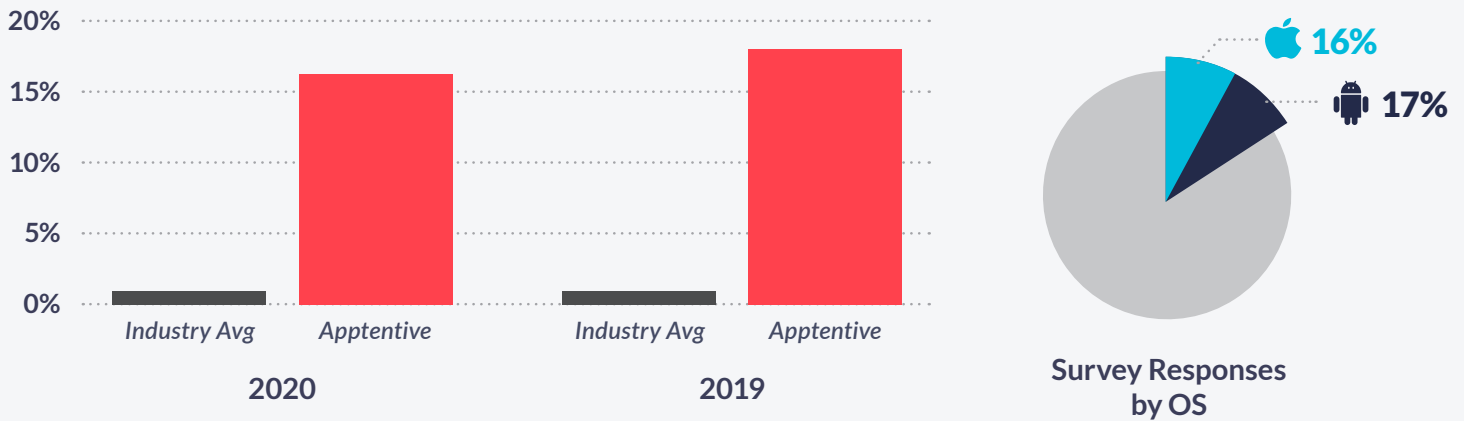
Not all surveys are delivered in the same way, and when consumers are given the choice to opt in or out, response rates soar. Note-linked surveys, or rather, surveys that are linked to using an Apptentive Note, saw a **response rate of 60%**. That's right: **Over half of all end-consumers across both operating systems responded to Note-linked surveys.**

Brands also expanded the number of **people they prompted to answer surveys to 25%** of their consumers. The more consumers you hear from, the more holistic your feedback will be.

Response Rate to Note-linked Surveys in 2020

Blended   **60%**

🍎   **63%**

🤖   **53%**

Consumers Prompted for Surveys in 2020

Blended   **25%**

🍎   **28%**

🤖   **19%**
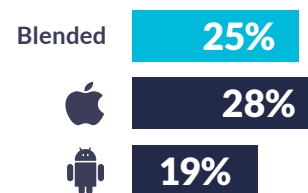
When consumer feedback is prioritized, the number of in-app messages consumers send to brands goes up. Luckily, brands are getting better at fielding and responding to messages as they improve their segments and customer profiles. In 2020, **72% of all in-app messages sent by customers to brands were responded to.**

We've **shared at length** why measuring emotion on a flat scale through NPS is a lagging indicator that tells us nothing about consumer behavior. NPS alone is a vanity metric that does not give you the "why" behind customer emotion—the thing you must act on in order to affect change. But aside from how we at Apptentive feel about NPS, we know it's still important to our customers as many of them are measured on it as part of their performance reviews.

Inbound Messages in 2020

· · · · · · · · · · ·

For every inbound message sent by consumers,

72%

were responded to by brands.

The average NPS for Apptentive customers in 2020 was +26. "Good" scores typically fall between +40-50, depending on industry, but we aren't surprised by these results. **At Apptentive, we advocate for our customers to run non-biased surveys over NPS in order to truly dig into customer emotion driving sentiment.** The +26 score is lower than average because it's realistic; our customers don't just target their fans in order to get a high result. Instead, they ask for feedback from happy and unhappy customers alike.

How Mobile Teams Should Respond

This year's data fascinated us in many ways as the effects of COVID-19 shook every inch of the mobile marketplace. Brands quickly pivoted to respond to rapidly changing consumer behavior due to pandemic-driven lockdowns. In return, consumers turned to brands in new, intimate ways as the mobile channel became a primary method of relationship building. Above all, watching the human spirit prevail and adapt during challenging times through mobile-supported human connection solidified our company's desire to <u>give every customer a voice</u>.

. . . .

To summarize what the report data taught us, there are three actions mobile teams need to take now in order to win market share in 2021 and beyond.

1. **Focus on retention, not acquisition.**

   Both retention and acquisition are necessary for all businesses. But while acquisition has been the primary focus for most of the digital age, data shows us that prioritizing retention is where brands can win long-term. Higher retention helps lower marketing costs, improve loyalty, and save both resources and **budget** to allocate toward other initiatives.

   Before you can hope to boost retention, you need to understand why customers leave in the first place. This takes both empowering your customers with an easy way to leave feedback in your app, and actively listening to their feedback and other social signals. The more you learn about how they feel at certain stages across your **customer journey**, the better you'll be able to pivot your product roadmap and offerings to fit their needs.

   Retention can also be used as a trust signal around how well your brand knows its customer base and how well customers are receiving your mobile experience. When you show good faith in listening to and acting on feedback, people tend to stick around.

2. Turn apps into listening channels.

Gauging the pulse of consumer sentiment is critical for brands to understand what's happening with customer experience and loyalty. And as the data above shows, mobile has become a primary—if not the only available—listening channel. It's time for brands to turn their mobile channel into a "listening post" for employing new voice-of-the-customer (VoC) technologies, and defining new processes to turn sentiment into action.

Understanding starts with listening, and there's no better way to listen than to put yourself in your customers' shoes, in the exact place they are digitally "standing." Brands need to <u>literally meet customers where they are:</u> at the exact time and place they land within your mobile experience.

From there, mobile teams must gather, measure, and act on what they learn through gathering customer feedback in order to make better product decisions—and to ultimately drive lasting customer loyalty.

3. Go all in on personalization.

Today's consumers are <u>primed for personalization</u>. As our data shows, allowing people to direct their own journey within your mobile experience based on individual preference is the key to short-term retention and long-term loyalty.

Personalizing in-app experiences centers on delivering the right message, to the right person, via the right medium, at the right place and time within the app. The deeper brands can segment their mobile consumers based on in-app behaviors, purchase patterns, and usage—ideally down to the individual customer ID—the more success they'll have at delivering customized experiences that aim to please.

<u>In app marketing</u>, less is more. The fewer messages each customer receives, the more powerful each message becomes. Make each message count. Make each message relevant. And make sure you are providing value to the customer above all else.

Media &
Entertainment

Media & Entertainment

Subcategories: News, Telco, Technology, Games, Sports, and Music

> ❝ It's important for us to reach our future audiences where they are, whether or not it's in their car, or on other digital platforms, or social media platforms. We're experiencing a sea change. We're not going back to the same levels of listening that we've experienced in the past on broadcast."

LORI KAPLAN
Senior Director of Audience Insights, NPR

Ratings and Reviews

Average Number of Ratings

	iOS	Android
	124,483	41,681
News	108,130	29,415
Telco	198,714	49,149
Technology	7,266	19,782
Games	16,020	22,992
Sports	103,792	43,746
Music	855,114	224,219

Average Star Rating

 4.24
 3.93

	iOS	Android
News	4.17	3.95
Telco	4.22	3.89
Technology	4.27	3.84
Games	4.5	4.07
Sports	4.67	3.95
Music	4.0	3.93

Average Number of Reviews

 580
 2,619

	iOS	Android
News	723	2,232
Telco	515	2,918
Technology	311	978
Games	167	211
Sports	400	2,433
Music	649	12,071
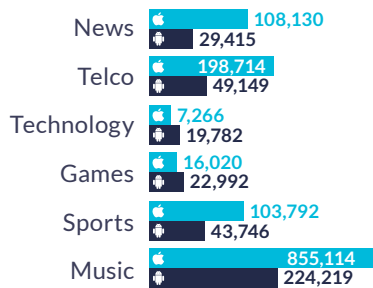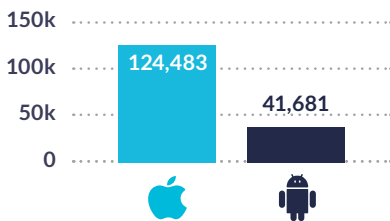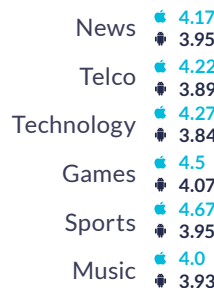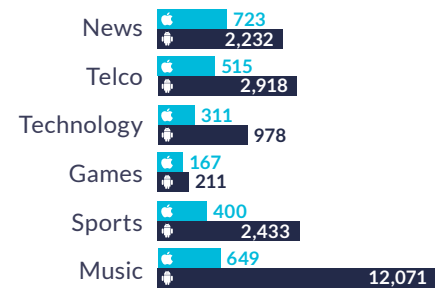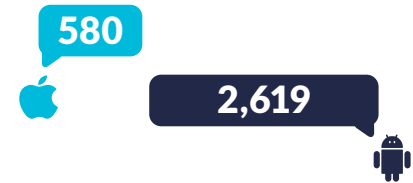
App Store Ratings Distribution

iOS

	★	★★	★★★	★★★★	★★★★★
Media	11%	3%	5%	14%	67%
News	12%	3%	5%	15%	65%
Telco	12%	2%	4%	12%	70%
Technology	9%	2%	4%	14%	71%
Games	5%	2%	6%	17%	70%
Sports	4%	2%	3%	11%	80%
Music	19%	4%	5%	12%	60%

Android

	★	★★	★★★	★★★★	★★★★★
Media	18%	4%	6%	13%	59%
News	19%	4%	6%	13%	60%
Telco	19%	4%	6%	12%	59%
Technology	20%	3%	5%	16%	56%
Games	12%	3%	8%	16%	61%
Sports	18%	5%	4%	11%	62%
Music	19%	4%	5%	12%	60%

Retention

Average 90-day Retention

60%
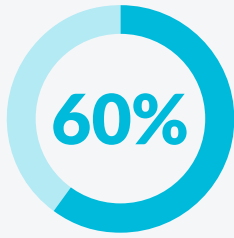
Media

News **72%**	Games **12%**
Telco **43%**	Sports **27%**
Technology **27%**	Music **50%**

Average Annual Retention

42%
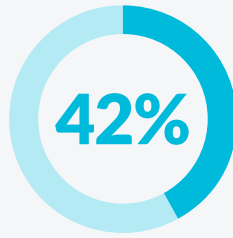
Media

News **56%**	Games **6%**
Telco **21%**	Sports **39%**
Technology **14%**	Music **38%**

90-Day Retention After Love Dialog

78%
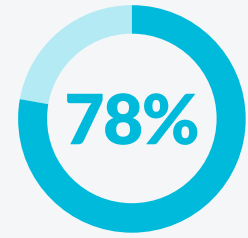
Media

News **91%**	Games **39%**
Telco **74%**	Sports **57%**
Technology **60%**	Music **73%**

Interaction and Response Rates
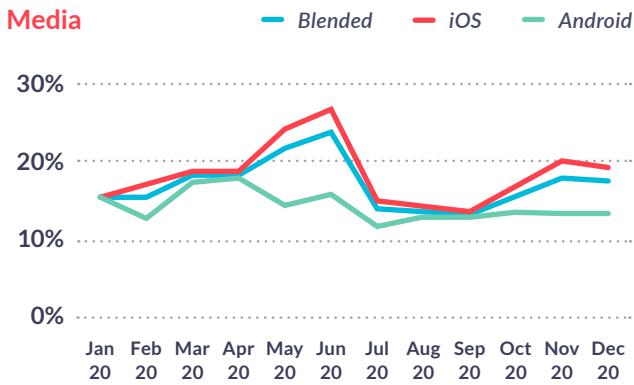
COVID's Impact on Monthly Interactions

Media — Blended, iOS, Android

News — Blended, iOS, Android

COVID's Impact on Monthly Response Rates

Media — Blended, iOS, Android

News — Blended, iOS, Android

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Telco
Blended — iOS — Android

Technology
Blended — iOS — Android

Games
Blended — iOS — Android

COVID's Impact on Monthly Response Rates

Telco
Blended — iOS — Android

Technology
Blended — iOS — Android

Games
Blended — iOS — Android

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Sports

— *Blended*   — *iOS*   — *Android*

Music

— *Blended*   — *iOS*   — *Android*

COVID's Impact on Monthly Response Rates

Sports

— *Blended*   — *iOS*   — *Android*

Music

— *Blended*   — *iOS*   — *Android*

Average Interaction Rate

29%

Media
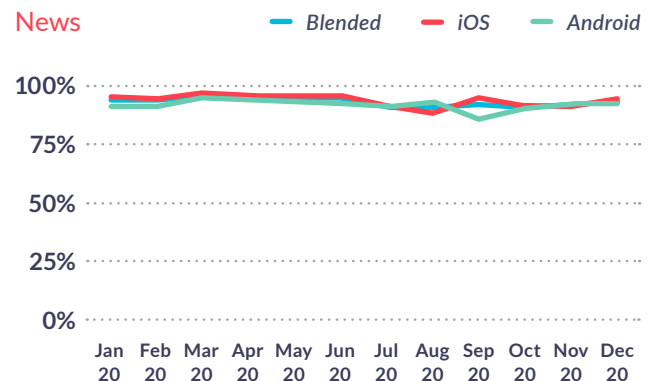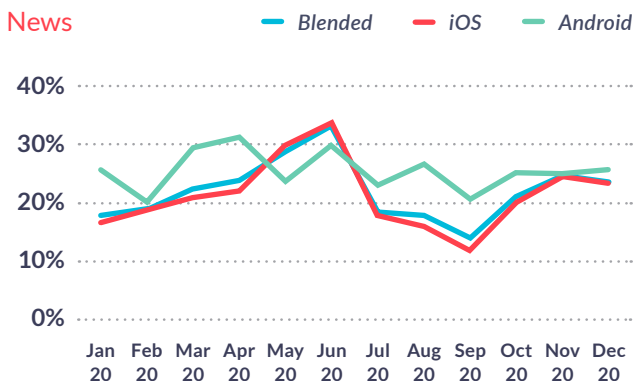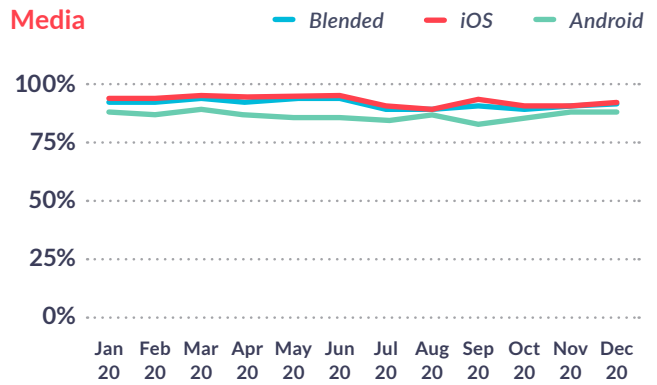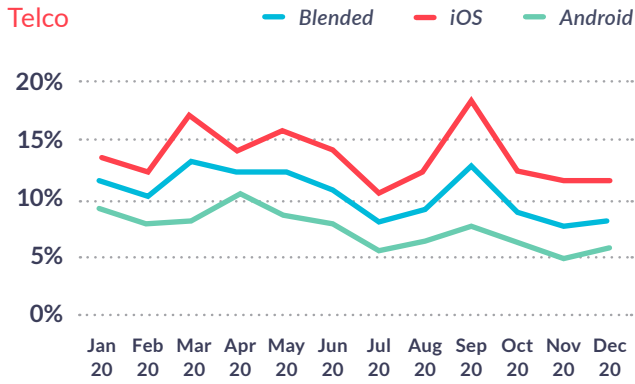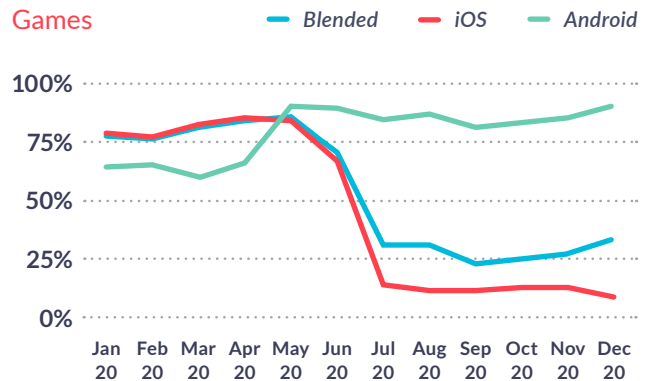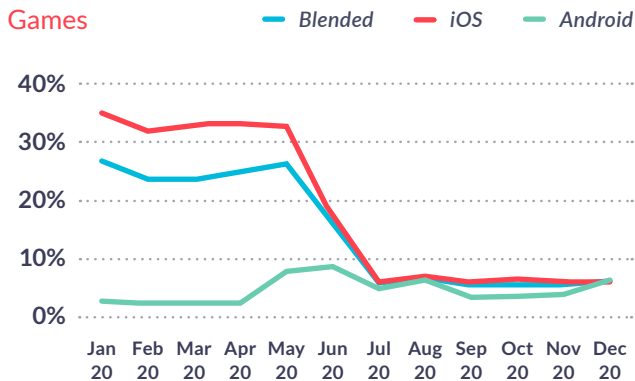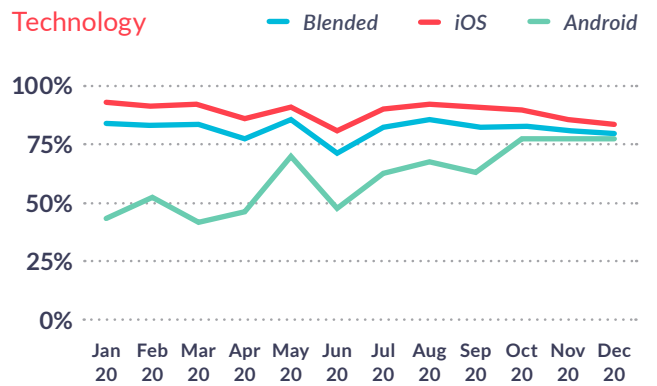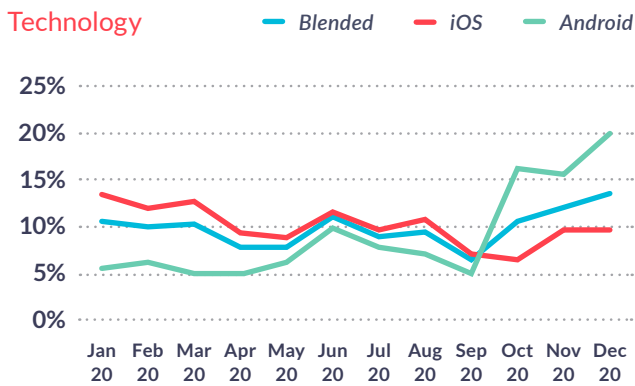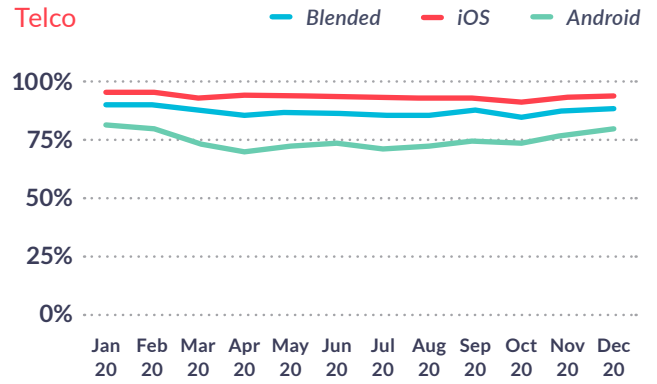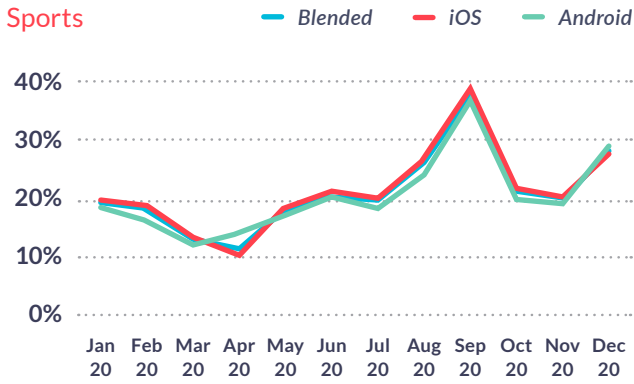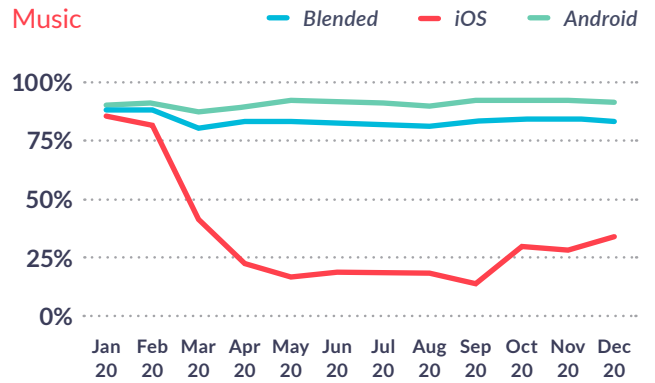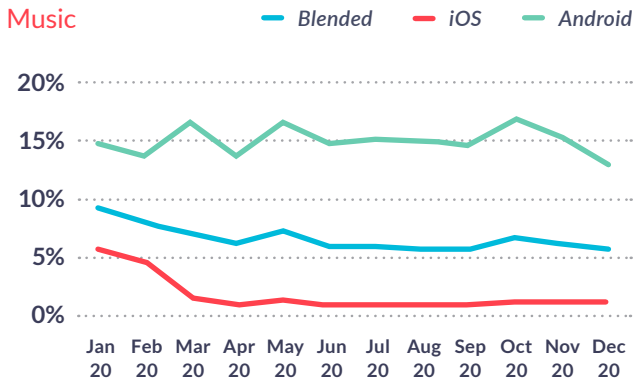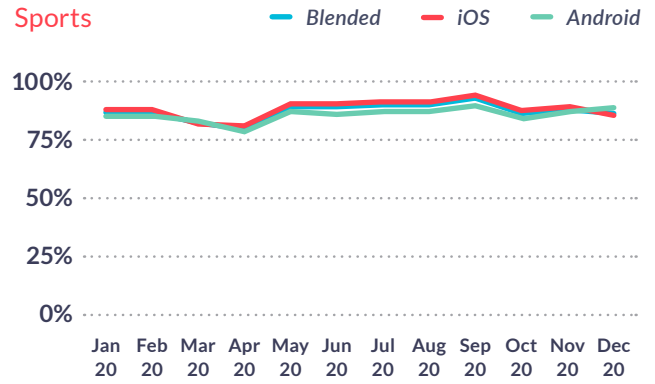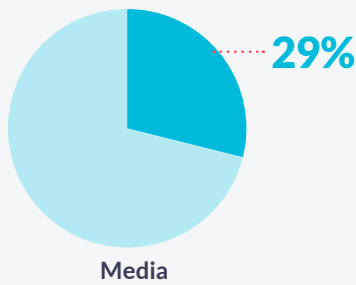
News **41%**	Games **21%**
Telco **19%**	Sports **44%**
Technology **16%**	Music **16%**

Average Response Rate to Interactions

92%
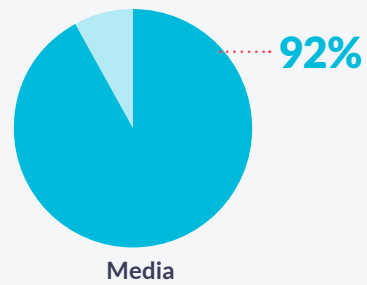
Media

News **95%**	Games **72%**
Telco **87%**	Sports **95%**
Technology **82%**	Music **85%**

Popular Phrases
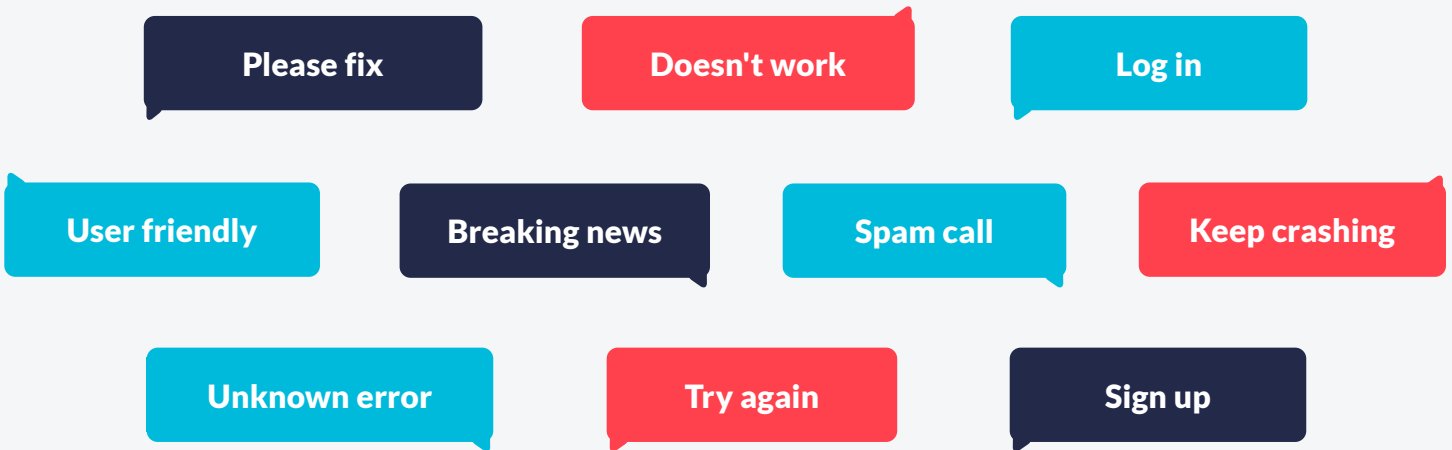
Please fix	Doesn't work	Log in
User friendly	Breaking news	Spam call	Keep crashing
Unknown error	Try again	Sign up
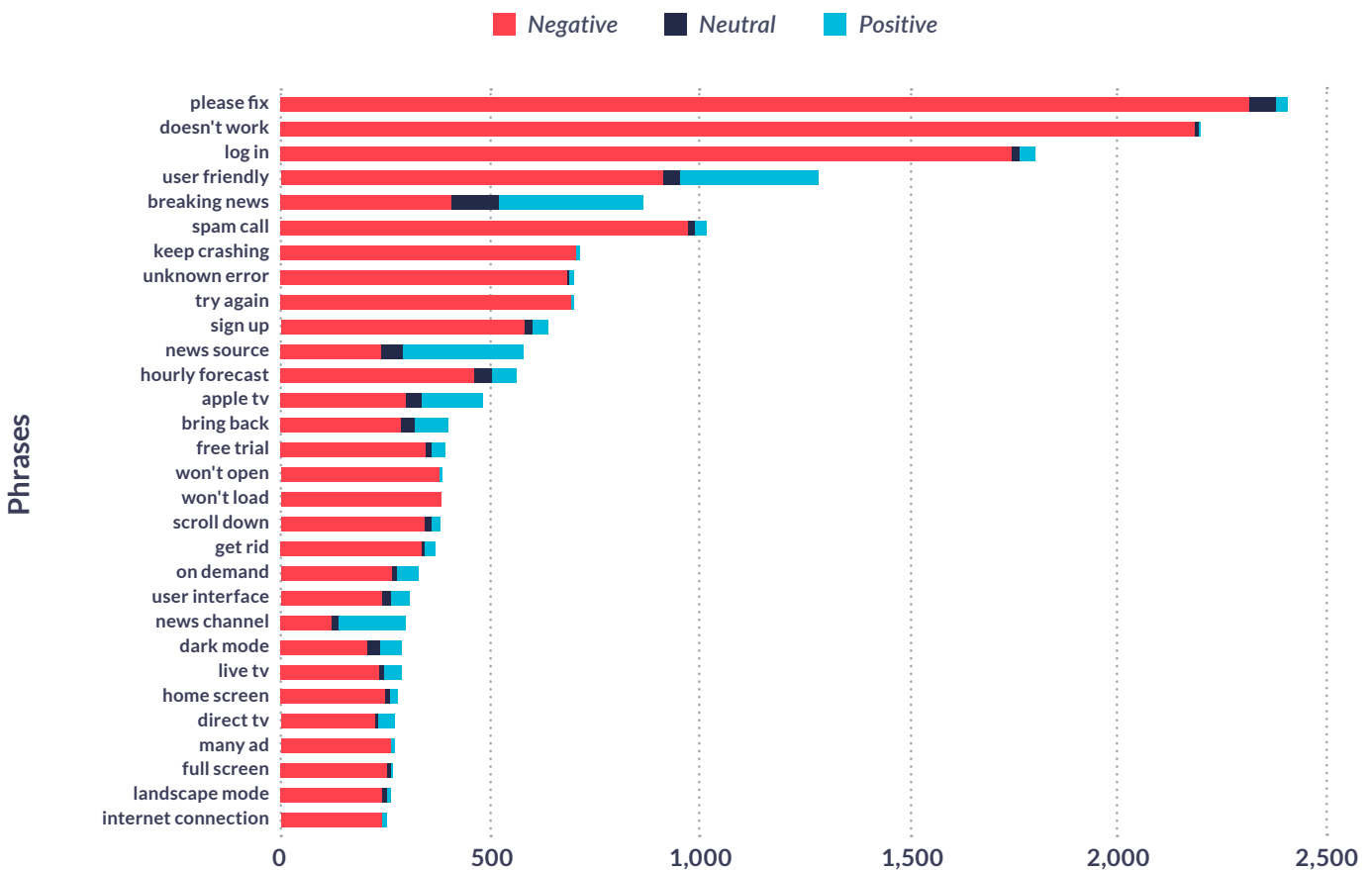
Popular Phrases with Sentiment Distribution

■ *Negative*   ■ *Neutral*   ■ *Positive*

Mobile Consumer Sentiment

Love Dialog Conversion Rate

Media

97% 🍎
93% Blended
82% 🤖

Category	Blended	🍎	🤖
News	94%	96%	81%
Telco	88%	98%	76%
Technology	94%	98%	85%
Games	81%	96%	72%
Sports	96%	97%	93%
Music	95%	97%	94%

Love Percent

Media

62% 🍎
65% Blended
73% 🤖

Category	Blended	🍎	🤖
News	60%	59%	70%
Telco	70%	70%	69%
Technology	79%	82%	71%
Games	64%	57%	69%
Sports	56%	55%	63%
Music	87%	86%	87%
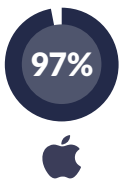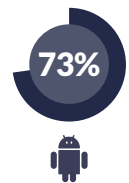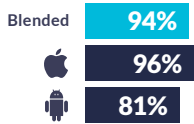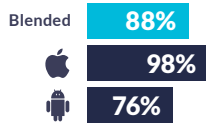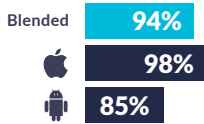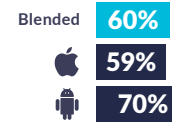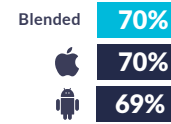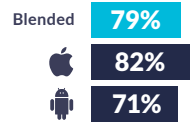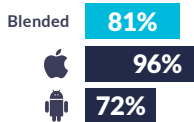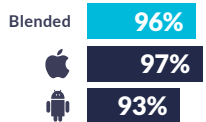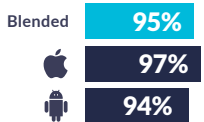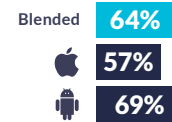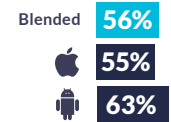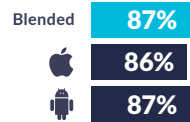
Retention Rates for Fans and Risks

Media

90-day Retention
Fans: 78%
Risks: 79%
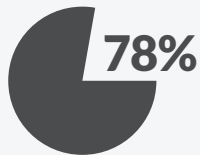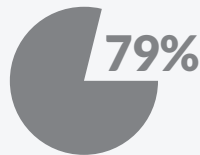
Annual Retention
Fans: 52%
Risks: 52%
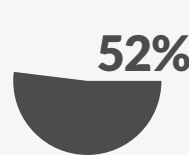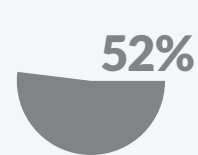
News
90-day Retention
Fans: **91%**
Risks: **92%**

Annual Retention
Fans: **75%**
Risks: **72%**

Telco
90-day Retention
Fans: **75%**
Risks: **75%**

Annual Retention
Fans: **34%**
Risks: **35%**

Technology
90-day Retention
Fans: **60%**
Risks: **61%**

Annual Retention
Fans: **39%**
Risks: **37%**

Games
90-day Retention
Fans: **33%**
Risks: **43%**

Annual Retention
Fans: **17%**
Risks: **17%**

Sports
90-day Retention
Fans: **60%**
Risks: **52%**

Annual Retention
Fans: **56%**
Risks: **51%**

Music
90-day Retention
Fans: **74%**
Risks: **65%**

Annual Retention
Fans: **48%**
Risks: **41%**

Expressed Consumer Emotion by Segment in 2020

Media

New Fans
Customers who have expressed positive emotion for the first time

Blended	**37%**
🍎	**32%**
🤖	**52%**

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended	**23%**
🍎	**24%**
🤖	**19%**

New Risks
Customers who have expressed negative emotion for the first time

Blended	**20%**
🍎	**21%**
🤖	**20%**

Repeat Risks
Customers who have expressed negative emotion at least twice in a row

Blended	**9%**
🍎	**10%**
🤖	**3%**

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended	**5%**
🍎	**6%**
🤖	**3%**

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended	**6%**
🍎	**6%**
🤖	**4%**

Shifted Emotions

Blended	**-3%**
🍎	**-3%**
🤖	**-6%**

News

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	37%	19%	25%	9%	5%	5%	3%
iOS	34%	20%	25%	10%	5%	6%	2%
Android	54%	14%	24%	3%	2%	3%	5%

Telco

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	32%	31%	14%	8%	7%	8%	-4%
iOS	24%	38%	10%	10%	9%	9%	-4%
Android	49%	16%	22%	5%	4%	5%	-7%

Technology

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	58%	20%	16%	2%	2%	2%	-8%
iOS	56%	25%	12%	2%	2%	3%	-6%
Android	62%	9%	25%	1%	1%	1%	-17%

Games

New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended: **49%**	Blended: **11%**	Blended: **31%**	Blended: **4%**	Blended: **3%**	Blended: **3%**	Blended: **-4%**
iOS: **50%**	iOS: **5%**	iOS: **36%**	iOS: **3%**	iOS: **2%**	iOS: **3%**	iOS: **-6%**
Android: **48%**	Android: **15%**	Android: **26%**	Android: **4%**	Android: **3%**	Android: **3%**	Android: **-2%**

Sports

New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended: **31%**	Blended: **21%**	Blended: **25%**	Blended: **11%**	Blended: **6%**	Blended: **6%**	Blended: **-2%**
iOS: **29%**	iOS: **22%**	iOS: **25%**	iOS: **11%**	iOS: **6%**	iOS: **6%**	iOS: **-2%**
Android: **39%**	Android: **20%**	Android: **25%**	Android: **7%**	Android: **4%**	Android: **5%**	Android: **-2%**

Music

New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended: **57%**	Blended: **27%**	Blended: **9%**	Blended: **1%**	Blended: **2%**	Blended: **3%**	Blended: **-10%**
iOS: **71%**	iOS: **14%**	iOS: **12%**	iOS: **1%**	iOS: **1%**	iOS: **1%**	iOS: **-1%**
Android: **56%**	Android: **29%**	Android: **8%**	Android: **1%**	Android: **2%**	Android: **3%**	Android: **-10%**

Surveys and Messages

Average Response Rate for In-app Surveys

15%

Media

News **11%**		Games **25%**	
Telco **26%**		Sports **27%**	
Technology **18%**		Music **21%**	

Average Response Rate to Note-linked Surveys

63%
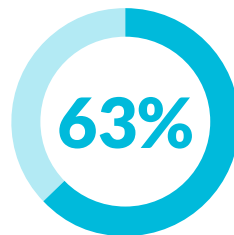
Media

News **71%**		Games **N/A**	
Telco **55%**		Sports **63%**	
Technology **79%**		Music **61%**	

Percentage of People Prompted for Surveys

28%
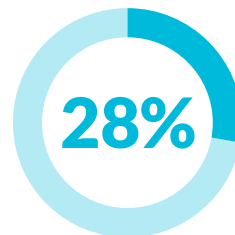
Media

News **32%**		Games **2%**	
Telco **31%**		Sports **4%**	
Technology **9%**		Music **2%**	

Inbound Message Response Rate

91%
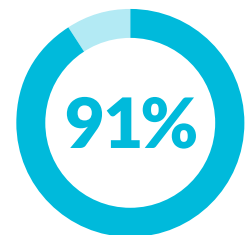
Media

News **17%**		Games **77%**	
Telco **46%**		Sports **103%**	
Technology **27%**		Music **89%**	

Summary of Media and Entertainment Apps in 2020

• • • • • • •

Media and Entertainment apps played a critical role in helping us get through 2020. While the world around us shifted in response to the pandemic, consumers turned to media apps as an outlet to stay informed, connect with loved ones, decompress, and even have some laughs. But the Media and Entertainment app category is broad, encompassing everything from news to games to sports, and consumer expectations and behavior varies dramatically between industries. Rather than comparing by benchmark, below is a short summary of the six subcategories included in our data.

News (global news networks, newspapers, etc.): What a year for news. News apps saw incredibly high retention rates, likely due to how much news people consumed and the fact that there was breaking news almost daily. Their 90-day retention was 72%, much higher than the macro average of 48%; annual retention was 56%, again much higher than macro average of 35%. Due to the amount of breaking news coverage, News apps had a high interaction rate of 41% (macro average is 26%), with a response rate of 95% that remained consistently high throughout the year. News apps prioritized hearing from customers by prompting 32% of consumers for in-app surveys, higher than the macro average of 25%. Their survey response rate was 11%, slightly lower than the macro average of 16%—but when surveys were presented with a Note, response rate went up to 71% (macro average 60%). News apps did, however, respond to many fewer inbound messages than other apps (17% vs macro average of 72%) mostly due to how much trolling they receive about the news itself rather than their product; those messages are not typically responded to.

Telco (communications providers, wireless networks, etc.): 2020 retention for Telco apps was slightly lower than the macro average. They saw a 90-day rate of 43% (vs 48%) and an annual retention rate of 21% (vs 35%). Telco apps' lower retention could be impacted by their lower number of interactions. The apps engaged fewer interactions than the macro average (19% compared to 26%), although their response rate remained relatively high (87%) and consistent throughout the year. But it's not for lack of trying. Telco apps prompted 31% of consumers for surveys, higher than macro average of 25%. As a result, their average response rate was 26%, higher than macro average 16%. Telco apps also had a Love Percent of 70%, higher than the macro average of 65%.

Technology (media creation, connectivity, etc.): Technology apps saw lots of consumers shifting emotions in 2020, with -8% shifted emotions vs the macro average of -4%. They also had low retention across the board, with a 90-day retention rate of 27% (macro average is 48%) and an annual retention rate of 14% (macro average is 35%). These low numbers are partly due to not reaching out to enough consumers. Technology apps only prompted 9% of their consumers for surveys compared to the macro average of 25%, and didn't prioritize responding to inbound messages (27% response rate vs the macro

average of 72%). But when they did prompt for surveys, their average response rate (18%) was higher than the macro average of 16%. While they saw a Love Percent of 79% (above the macro average of 65%), it's likely inflated as not enough consumers were asked whether or not they love the company. Technology apps have a big opportunity in 2021 and beyond to reach more of their consumers through proactive engagement to get ahead of shifting emotions, and ultimately improve retention.

Games (mobile games, gaming studios, etc.): Games apps saw poor retention in 2020, with a 90-day retention rate of 12% (macro average is 48%) and an annual retention rate of 6% (macro average is 35%). While higher churn is common in the gaming marketplace, these numbers are still low and can be improved. A big contributor to Games apps' low retention was not reaching out to a large enough group of consumers in order to gauge sentiment and build out product roadmaps that work for the majority— Games apps only reached out to 2% of consumers for surveys, far below the macro average of 25%. But while few in number, their surveys were successful. Games apps saw a survey response rate of 25%, above the macro average of 16%. They also had a high inbound message response rate of 77% compared to the macro average of 72%. The 2021 strategy for a successful Games app includes expanding consumer reach to gather and act on a more accurate voice of the customer.

Sports (leagues, teams, betting, etc.): Sports apps had a high interaction rate (44%) compared to the macro average of 26%. Mobile teams sent many fewer interactions in the first half of the year while sporting events were put on pause due to the pandemic, while August saw a spike in interactions which then held through the end of the year. Sports apps had a consistently high response rate (95% compared to the 92% macro average). Their retention rates were relatively normal for the category, with 90-day retention less than the macro average (27% compared to 48%) but annual retention higher than the macro average (39% compared to 35%). This is mostly due to seasonality (e.g. a consumer can disappear for the off-season then reappear the next season). While Sports apps had a high survey response rate of 27% (macro average is 16%), they prompted a very small amount of consumers (4% compared to the macro average of 25%) for feedback—an opportunity to improve upon in 2021 and beyond.

Music (streaming, broadcasting, etc.): Music apps saw strong retention for both their 90-day rate (50% compared to the 48% macro average) and annual rate (38% compared to the macro average of 35%). Their interaction rate (16%) and response rate (85%) were slightly lower than macro averages (26% and 92%). However, consumers showed their love for Music apps by giving them a Love Percent of 87%, way above the macro average of 65%. But while many consumers shared their love, Music apps also experienced lots of shifting emotions at -10% (macro average is -4%). For success moving forward, mobile teams have an opportunity to proactively get ahead of shifts in emotion by reaching out to a higher percentage of consumers; Music apps only prompted 2% of consumers for surveys, well below the macro average of 25%.

Finance

Finance

Subcategories: Fintech, Banking, and Insurance

> **"** *We act as the hub of financial lives, so trust and accountability are essential in that role. Using member feedback [and] member experience to really drive what we do helps build that trust and accountability. Members can go home and say, 'You know, my credit union has my best interest at heart because I know they're building things based on my feedback [and] based on what I'm telling them, based on what I want out of this product, and what will make my financial life easier.'"*

KEVIN WILBANKS
Advantis Credit Union

Ratings and Reviews

Average Number of Ratings

	iOS	Android
	28,891	6,133
Fintech	89,511	26,246
Banking	8,528	1,933
Insurance	224,879	19,950

Average Star Rating

iOS: 4.63
Android: 4.22

	iOS	Android
Fintech	4.81	4.29
Banking	4.59	4.25
Insurance	4.93	3.88

Average Number of Reviews

iOS: 104
Android: 960

	iOS	Android
Fintech	408	4,956
Banking	49	302
Insurance	334	2,483
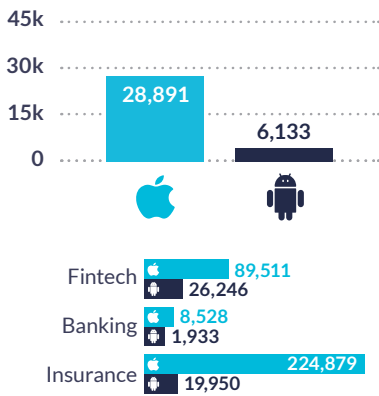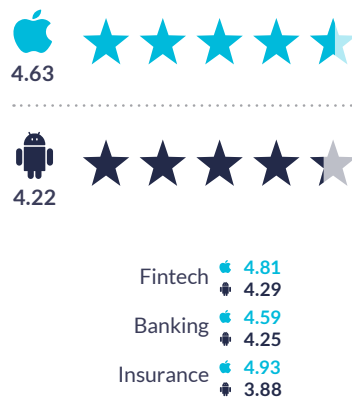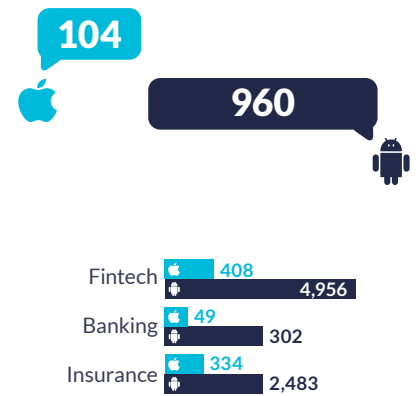
App Store Ratings Distribution

iOS

	★	★★	★★★	★★★★	★★★★★
Finance	6%	2%	3%	11%	78%
Fintech	3%	0%	2%	11%	84%
Banking	7%	2%	3%	11%	77%
Insurance	1%	1%	3%	12%	83%

Android

	★	★★	★★★	★★★★	★★★★★
Finance	13%	3%	3%	11%	70%
Fintech	11%	2%	4%	11%	72%
Banking	12%	3%	3%	11%	71%
Insurance	20%	4%	4%	12%	60%

Retention

Average 90-day Retention
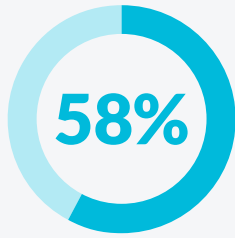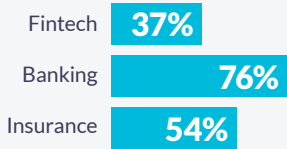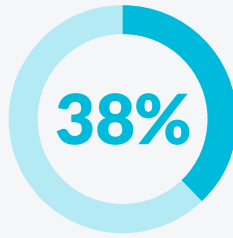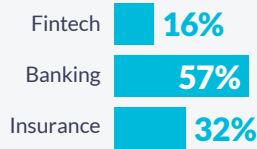
58%

Finance

Fintech	37%
Banking	76%
Insurance	54%

Average Annual Retention

38%

Finance

Fintech	16%
Banking	57%
Insurance	32%

90-Day Retention After Love Dialog

69%

Finance

Fintech	41%
Banking	92%
Insurance	84%
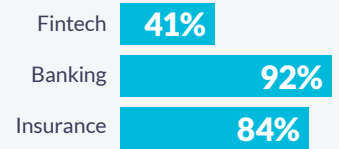
Interaction and Response Rates

COVID's Impact on Monthly Interactions

Finance — Blended — iOS — Android

Fintech — Blended — iOS — Android
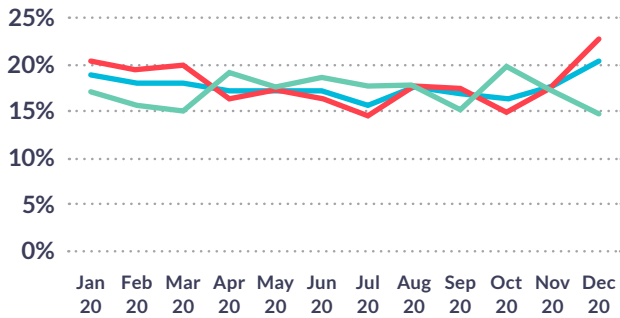
COVID's Impact on Monthly Response Rates

Finance — Blended — iOS — Android

Fintech — Blended — iOS — Android

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Banking
Blended — iOS — Android

Insurance
Blended — iOS — Android

COVID's Impact on Monthly Response Rates

Banking
Blended — iOS — Android

Insurance
Blended — iOS — Android

Average Interaction Rate

38%

Finance

Fintech	33%
Banking	37%
Insurance	44%

Average Response Rate to Interactions

94%

Finance

Fintech	92%
Banking	97%
Insurance	93%

Popular Phrases

Credit score	Log in	Thank you

Customer service	User friendly	Doesn't work	Set up

Sign in	Credit union	Credit card

Popular Phrases with Sentiment Distribution

■ *Negative*   ■ *Neutral*   ■ *Positive*

Phrases:
- credit score
- log in
- thank you
- customer service
- user friendly
- doesn't work
- set up
- sign in
- credit union
- credit card
- sign up
- keep track
- credit report
- keep crashing
- take forever
- transfer money
- exchange rate
- insurance company
- debit card
- won't open
- mobile deposit
- stopped working
- previous version
- phone number
- bill pay
- saving account
- insurance card
- tech support
- extremely slow
- shut down

(x-axis: 0, 500, 1,000, 1,500, 2,000, 2,500)

y-axis label: **Phrases**

Mobile Consumer Sentiment

Love Dialog Conversion Rate

Finance
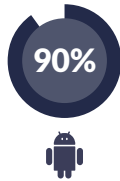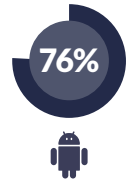
98% (Apple)

95% Blended

90% (Android)

Fintech
Blended	**94%**
(Apple)	**97%**
(Android)	**90%**

Banking
Blended	**97%**
(Apple)	**98%**
(Android)	**94%**

Insurance
Blended	**95%**
(Apple)	**98%**
(Android)	**88%**

Love Percent

Finance

75% (Apple)

75% Blended

76% (Android)

Fintech
Blended	**74%**
(Apple)	**73%**
(Android)	**75%**

Banking
Blended	**75%**
(Apple)	**74%**
(Android)	**78%**
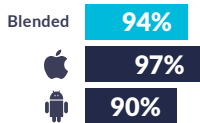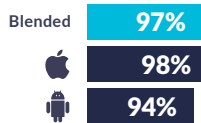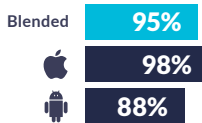
Insurance
Blended	**77%**
(Apple)	**77%**
(Android)	**76%**
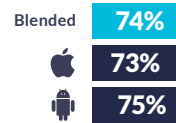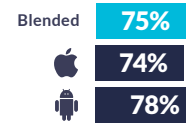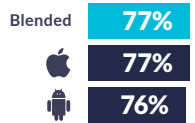
Retention Rates for Fans and Risks

Finance

90-day Retention

72% Fans

57% Risks

Annual Retention

49% Fans
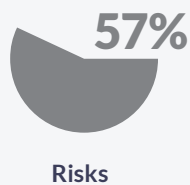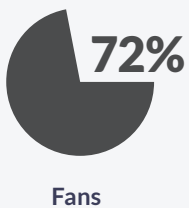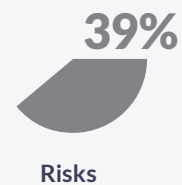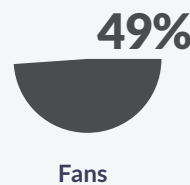
39% Risks

Fintech

90-day Retention

Fans: **45%**
Risks: **27%**

Annual Retention

Fans: **23%**
Risks: **12%**

Banking

90-day Retention

Fans: **93%**
Risks: **89%**

Annual Retention

Fans: **75%**
Risks: **71%**

Insurance

90-day Retention

Fans: **84%**
Risks: **79%**

Annual Retention

Fans: **57%**
Risks: **54%**

Expressed Consumer Emotion by Segment in 2020

Finance

New Fans
Customers who have expressed positive emotion for the first time

Blended **34%**

 30%

 44%

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended **37%**

 40%

 29%

New Risks
Customers who have expressed negative emotion for the first time

Blended **11%**

 9%

 14%

Repeat Risks
Customers who have expressed negative emotion at least twice in a row

Blended **6%**

 7%

 4%

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended **5%**

 6%

 4%

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended **6%**

 7%

 5%

Shifted Emotions

Blended **-8%**

 -7%

 -9%

Fintech

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	43%	28%	15%	5%	4%	5%	-10%
iOS	40%	30%	14%	6%	5%	6%	-12%
Android	47%	35%	17%	4%	4%	4%	-7%

Banking

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	23%	46%	7%	10%	7%	8%	-3%
iOS	19%	49%	6%	10%	8%	8%	-2%
Android	38%	40%	11%	5%	4%	5%	-7%

Insurance

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	44%	31%	12%	4%	4%	5%	-18%
iOS	42%	34%	11%	4%	4%	6%	-18%
Android	48%	26%	14%	3%	3%	5%	-17%

Surveys and Messages

Average Response Rate for In-app Surveys

15%

Finance

Fintech	9%
Banking	14%
Insurance	18%

Average Response Rate to Note-linked Surveys

76%

Finance

Fintech	N/A
Banking	52%
Insurance	79%

Percentage of People Prompted for Surveys

23%

Finance

Fintech	13%
Banking	27%
Insurance	30%

Inbound Message Response Rate

64%

Finance

Fintech	61%
Banking	46%
Insurance	80%

Summary of Finance Apps in 2020

Finance brands were generally spared by the marketplace shakeup of 2020. Consumers used Finance apps for the same standard purposes, although DAU spiked as people used mobile as their primary access point to banks and finance management. In this report, Finance apps are separated into three subcategories: Fintech (credit score, mortgage, stocks and bonds, loan consolidation, etc.), Banking (banks and credit unions), and Insurance (auto, home, life, renters, pets, etc.). Consumers in each subcategory have vastly different motivations and usage patterns, which we see represented in the data.

Finance apps typically see high retention rates, especially in the Banking subcategory as consumers tend to only belong to one bank at a time and rarely switch. Banking apps saw 76% 90-day retention (48% macro average), with Insurance closely behind at 54%. Fintech fell slightly below the average at 37%. Looking at annual retention (macro average is 35%), Banking apps continued their retention stronghold at 57%, while Insurance (32%) and Fintech (16%) fell below the macro average. Despite the differences between subcategories, the Love Dialog had a positive impact on all consumer groups. When engaged with a Love Dialog, 90-day retention grew to 41% in Fintech, 84% in Insurance, and a whopping 92% in Banking—said another way, almost all Banking consumers were retained for three months after they engaged with a Love Dialog.

Perhaps the most unique data point in Finance apps comes from shifting emotions. Finance apps saw double the number of consumers (-8% compared to the -4% macro average) shift their emotions between Fan and Risk. This is notable because despite the shift, retention numbers remain high. It's likely that Finance apps see lower churn than other categories due to the simple fact that it's hard for people to change banks and shift their financial planning tools. Regardless of the reason, understanding shifts in emotion and proactively engaging with consumers to get ahead of them is a big opportunity for Finance brands in 2021 and beyond.

Food & Drink

Food & Drink
Subcategories: Restaurant and Food Services

> *[We've been] rapidly innovating in order to capture new demand, new occasions that we didn't have before that tied to how customers are currently leading their lives. As customers have modified their behavior, we've adapted to accommodate them. We've made improvements to the app and to our curbside pickup process. And we see the opportunity to continue to realize efficiencies, not only through our loyalty program-oriented marketing, which includes the personalized marketing that we do as we build these relationships with our customers, but also through social media and traditional media."*

PAT GRISMER
CFO, Starbucks

Ratings and Reviews

Average Number of Ratings

346,599 (iOS)
45,642 (Android)

Restaurant	602,547 / 64,082
Food Services	137,186 / 21,671

Average Star Rating

4.74 (Apple) ★★★★★
3.96 (Android) ★★★★☆

Restaurant	4.78 / 3.74
Food Services	4.7 / 4.24

Average Number of Reviews

1,223 (Apple)
4,695 (Android)

Restaurant	1,641 / 6,284
Food Services	748 / 2,708
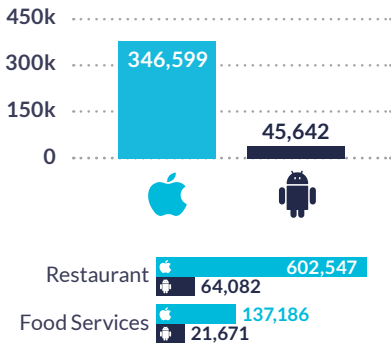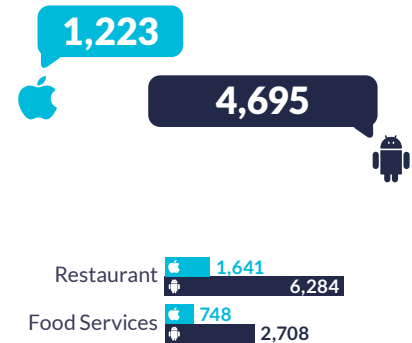
App Store Ratings Distribution

iOS

	★	★★	★★★	★★★★	★★★★★
Food & Drink	3%	1%	3%	11%	82%
Restaurant	3%	1%	2%	9%	85%
Food Services	3%	1%	4%	12%	80%

Android

	★	★★	★★★	★★★★	★★★★★
Food & Drink	18%	3%	5%	13%	61%
Restaurant	24%	4%	5%	12%	55%
Food Services	11%	3%	5%	14%	67%

Retention

Average 90-day Retention

43%
Food & Drink

Restaurant **42%**
Food Services **49%**

Average Annual Retention

40%
Food & Drink

Restaurant **40%**
Food Services **34%**

90-Day Retention After Love Dialog

78%
Food & Drink

Restaurant **77%**
Food Services **77%**

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Food & Drink — Blended — iOS — Android

Restaurant — Blended — iOS — Android

COVID's Impact on Monthly Response Rates

Food & Drink — Blended — iOS — Android

Restaurant — Blended — iOS — Android

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Food Services — Blended — iOS — Android

COVID's Impact on Monthly Response Rates

Food Services — Blended — iOS — Android

Average Interaction Rate

22%

Food & Drink

Restaurant **22%**

Food Services **24%**

Average Response Rate to Interactions

92%

Food & Drink

Restaurant **90%**

Food Services **97%**

Popular Phrases

Pick up

Doesn't work

Drive thru

Customer service

Log in

Credit card

Mobile order

Sign up

Please fix

Go through

Popular Phrases with Sentiment Distribution

■ *Negative*   ■ *Neutral*   ■ *Positive*

Phrases
pick up
doesn't work
drive thru
customer service
log in
credit card
mobile order
sign up
please fix
go through
order ahead
gift card
user friendly
try again
delivery fee
click on
delivery service
payment method
phone number
debit card
keep freezing
never received
error message
keep crashing
long time
promo code
email address
won't load
apple pay
parking lot

0 · 2,000 · 4,000 · 6,000 · 8,000

Mobile Consumer Sentiment

Love Dialog Conversion Rate

Food & Drink

97%

92%
Blended

81%

Restaurant

Blended **89%**

97%

77%

Food Services

Blended **97%**

98%

93%
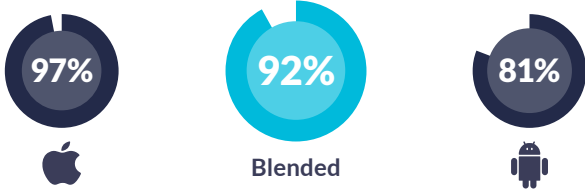
Love Percent

Food & Drink

60%

60%
Blended

60%

Restaurant

Blended **58%**

58%

57%

Food Services

Blended **65%**

63%

70%
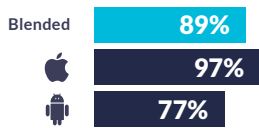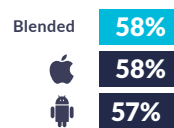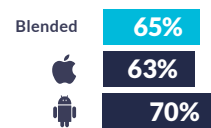
Retention Rates for Fans and Risks

Food & Drink

90-day Retention

81%
Fans

73%
Risks

Annual Retention

60%
Fans

55%
Risks
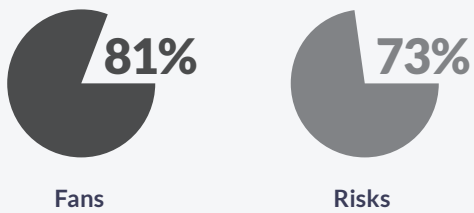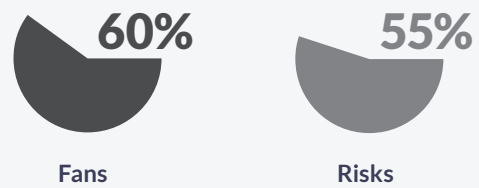
Restaurant

90-day Retention

Fans: **80%**

Risks: **73%**

Annual Retention

Fans: **60%**

Risks: **57%**

Food Services

90-day Retention

Fans: **77%**

Risks: **77%**

Annual Retention

Fans: **59%**

Risks: **55%**

Expressed Consumer Emotion by Segment in 2020

Food & Drink

New Fans
Customers who have expressed positive emotion for the first time
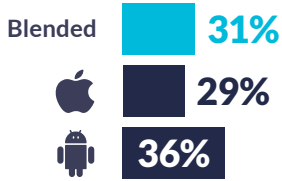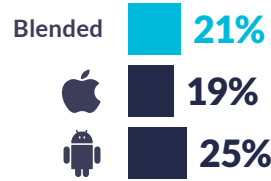
Blended	**31%**
Apple	**29%**
Android	**36%**

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended	**24%**
Apple	**25%**
Android	**20%**

New Risks
Customers who have expressed negative emotion for the first time

Blended	**21%**
Apple	**19%**
Android	**25%**

Repeat Risks
Customers who have expressed negative emotion at least twice in a row

Blended	**11%**
Apple	**12%**
Android	**8%**

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended	**7%**
Apple	**7%**
Android	**5%**

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended	**7%**
Apple	**8%**
Android	**6%**

Shifted Emotions
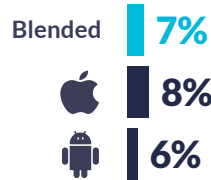
Blended	**-5%**
Apple	**-5%**
Android	**-8%**
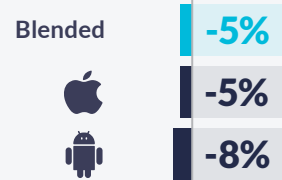
Restaurant

New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended: **32%**	Blended: **21%**	Blended: **23%**	Blended: **11%**	Blended: **6%**	Blended: **7%**	Blended: **-6%**
iOS: **29%**	iOS: **23%**	iOS: **21%**	iOS: **12%**	iOS: **7%**	iOS: **7%**	iOS: **-4%**
Android: **36%**	Android: **17%**	Android: **28%**	Android: **9%**	Android: **5%**	Android: **6%**	Android: **-9%**

Food Services

New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended: **29%**	Blended: **29%**	Blended: **16%**	Blended: **10%**	Blended: **7%**	Blended: **8%**	Blended: **-5%**
iOS: **27%**	iOS: **29%**	iOS: **15%**	iOS: **11%**	iOS: **8%**	iOS: **9%**	iOS: **-5%**
Android: **37%**	Android: **28%**	Android: **16%**	Android: **8%**	Android: **5%**	Android: **6%**	Android: **-5%**

Surveys and Messages
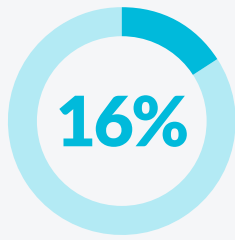
Average Response Rate for In-app Surveys	Average Response Rate to Note-linked Surveys	Percentage of People Prompted for Surveys	Inbound Message Response Rate
16%	**67%**	**34%**	**37%**
Food & Drink	Food & Drink	Food & Drink	Food & Drink
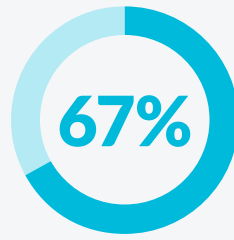
Restaurant	**12%**	Restaurant	**74%**
Food Services	**26%**	Food Services	**10%**
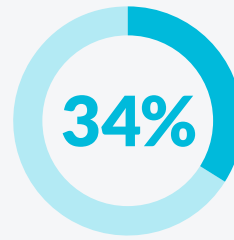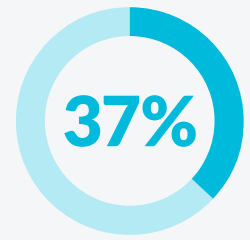
Restaurant	**32%**	Restaurant	**39%**
Food Services	**44%**	Food Services	**N/A**

Summary of Food and Drink Apps in 2020

The food and drink industry was heavily impacted by restrictions on dining, shopping, and delivery in 2020. While the year was disastrous for many food and drink companies, there were also many whose apps tell incredible tales of resilience, ingenuity, and embracing the digital shift. Food and Drink apps are separated into two subcategories: Restaurants (both QSR and sit down) and Food Services (grocery, food delivery, digital recipes, etc.).

Monthly interactions were closely correlated to the months when COVID-19 lockdowns were at their most extreme. March through May shows an increase in interactions, leveling out in June and ticking back up in October. Companies in both Restaurant and Food Service used their apps to get useful information about service changes in front of consumers, embracing the shift to mobile the industry experienced. Mobile teams also kept their response rates high throughout the year—no easy feat as the marketplace responded to unprecedented shifts in how service could be given.

As part of the increased interactions, Food and Drink apps leaned on in-app surveys to gauge consumer emotion and listen for feedback. The percentage of people prompted for surveys was higher than the macro average (25%) in both Restaurant apps (32%) and Food Services apps (44%).

As a result, retention for Food and Drink apps didn't take a strong hit. Average 90-day retention (43%) was slightly below the macro average of 48%. Annual retention (40%) even outperformed the macro average of 35%. These companies prioritized in-app consumer communication when it was one of the only—if not the only—channels available, and the results speak for themselves.

Apptentive

Healthcare

Healthcare

Subcategories: Medical and Fitness

> *We've created these mobile health solutions that we think people will use without really understanding what people really need. [In future technology], we must fundamentally understand what people need and then create solutions that help them. People know a lot about their own health and what they want to do. If we just let them, they'll do well."*

DOUGLAS WOOD
Medical Director, The Mayo Clinic's
Center for Innovation

Ratings and Reviews

Average Number of Ratings

44,531

5,880

Medical	14,174	
	3,151	
Fitness	128,709	
	12,896	

Average Star Rating

4.54

3.83

Medical	4.5	
	3.81	
Fitness	4.67	
	3.87	

Average Number of Reviews

435

1,169
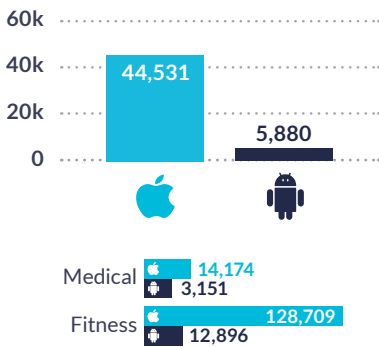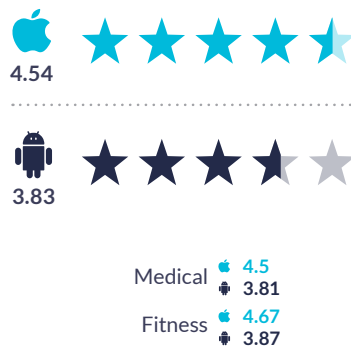
Medical	256	
	643	
Fitness	874	
	2,447	
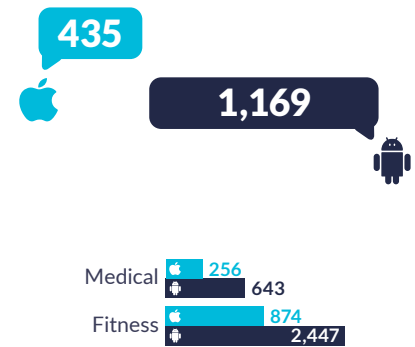
App Store Ratings Distribution

iOS

	★	★★	★★★	★★★★	★★★★★
Healthcare	5%	1%	4%	11%	79%
Medical	6%	1%	5%	11%	77%
Fitness	1%	1%	3%	13%	82%

Android

	★	★★	★★★	★★★★	★★★★★
Healthcare	19%	5%	6%	13%	57%
Medical	20%	5%	6%	13%	56%
Fitness	18%	5%	7%	12%	58%

Retention

Average 90-day Retention

31%

Healthcare

| Medical | 34% |
| Fitness | 31% |

Average Annual Retention

18%

Healthcare

| Medical | 16% |
| Fitness | 19% |

90-Day Retention After Love Dialog

70%

Healthcare

| Medical | 66% |
| Fitness | 71% |

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Healthcare   — *Blended*   — *iOS*   — *Android*

Medical   — *Blended*   — *iOS*   — *Android*

COVID's Impact on Monthly Response Rates

Healthcare   — *Blended*   — *iOS*   — *Android*

Medical   — *Blended*   — *iOS*   — *Android*

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Fitness — **Blended** — **iOS** — **Android**

COVID's Impact on Monthly Response Rates

Fitness — **Blended** — **iOS** — **Android**

Average Interaction Rate

17%

Healthcare

Medical	**22%**
Fitness	**16%**

Average Response Rate to Interactions

95%

Healthcare

Medical	**95%**
Fitness	**95%**

Popular Phrases

Thank you **Log in** **Highly recommend**

Please fix **Doesn't work** **Sign up** **Serial number**

Keep track **Set up** **User friendly**

Popular Phrases with Sentiment Distribution

Legend: ■ Negative ■ Neutral ■ Positive

Phrases (top to bottom):
thank you, log in, highly recommend, please fix, doesn't work, sign up, serial number, keep track, set up, user friendly, meal plan, stopped working, work out, really enjoy, sign in, google map, keep crashing, customer service, apple watch, apple health, try again, internet connection, high quality, bluetooth connection, lose weight, take forever, stay connected, no response, heart rate, workout plan

X-axis: 0, 200, 400, 600, 800

Mobile Consumer Sentiment

Love Dialog Conversion Rate

Healthcare

98% 🍎

96% Blended

90% 🤖

Medical

Blended **96%**
🍎 **97%**
🤖 **93%**

Fitness

Blended **95%**
🍎 **98%**
🤖 **88%**

Love Percent

Healthcare

70% 🍎

70% Blended

71% 🤖

Medical

Blended **70%**
🍎 **68%**
🤖 **74%**

Fitness

Blended **71%**
🍎 **71%**
🤖 **70%**
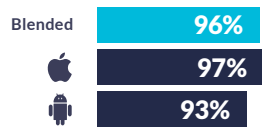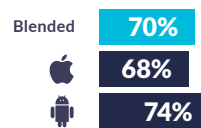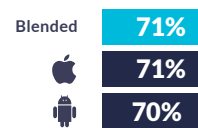
Retention Rates for Fans and Risks

Healthcare

90-day Retention

72% Fans

65% Risks

Annual Retention

46% Fans

38% Risks
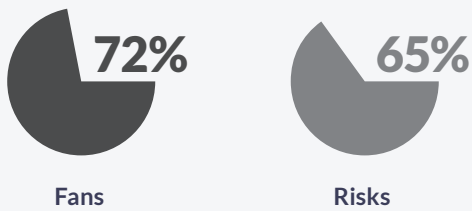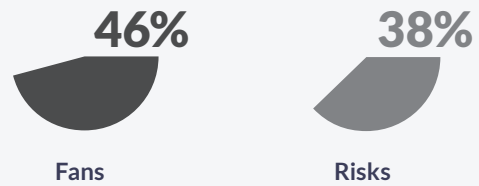
Medical

90-day Retention

Fans: **69%**
Risks: **59%**

Annual Retention

Fans: **41%**
Risks: **35%**

Fitness

90-day Retention

Fans: **74%**
Risks: **64%**

Annual Retention

Fans: **47%**
Risks: **40%**

Expressed Consumer Emotion by Segment in 2020

Healthcare

New Fans
Customers who have expressed positive emotion for the first time

Blended **48%**

 47%

 52%

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended **20%**

 21%

 18%

New Risks
Customers who have expressed negative emotion for the first time

Blended **21%**

 20%

 22%

Repeat Risks
Customers who have expressed negative emotion at least twice in a row

Blended **4%**

 4%

 3%

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended **4%**

 4%

 3%

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended **4%**

 4%

 3%

Shifted Emotions

Blended **-2%**

 -1%

 -6%

Medical

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	**52%**	**18%**	**23%**	**3%**	**2%**	**3%**	**-3%**
iOS	**52%**	**15%**	**24%**	**4%**	**3%**	**3%**	**-1%**
Android	**51%**	**24%**	**19%**	**2%**	**2%**	**2%**	**-9%**

Fitness

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	**47%**	**21%**	**20%**	**4%**	**4%**	**4%**	**-1%**
iOS	**45%**	**23%**	**19%**	**5%**	**4%**	**5%**	**-1%**
Android	**52%**	**16%**	**24%**	**3%**	**3%**	**3%**	**-5%**

Surveys and Messages

Average Response Rate for In-app Surveys	**Average Response Rate to Note-linked Surveys**	**Percentage of People Prompted for Surveys**	**Inbound Message Response Rate**
9%	**57%**	**18%**	**40%**
Healthcare	Healthcare	Healthcare	Healthcare

	In-app Surveys		Note-linked Surveys		Prompted for Surveys		Inbound Message
Medical	**14%**	Medical	**57%**	Medical	**24%**	Medical	**58%**
Fitness	**5%**	Fitness	**N/A**	Fitness	**14%**	Fitness	**38%**

Summary of Healthcare Apps in 2020

It was quite a year for healthcare. While we watched brave, brilliant healthcare workers combat the pandemic on the front lines, the mobile technology used to support their efforts from home underwent massive change. Healthcare apps saw incredible floods of new consumers as the world transitioned to managing health remotely, and the impact on engagement was stunning. In our research, Healthcare apps are divided into two subcategories: Medical (public health, condition management, reproductive services, insurance, etc.) and Fitness (fitness tracking, nutrition, workout plans, etc.).

Unfortunately, Healthcare apps had low retention rates in 2020. Medical apps saw 90-day retention of 34% (macro average is 48%) and annual retention of 16% (macro average is 35%); Fitness apps saw 90-day retention of 31% and annual retention of 19%. However, retention in both categories saw a huge increase after consumers were proactively engaged. When consumers saw a Love Dialog, their 90-day retention jumped to 66% in Medical (from 34%) and 71% in Fitness (from 31%). Healthcare consumers responded marvelously to brands who asked for and acted on their feedback.

While MAU in Healthcare apps went up, the number of interactions went down (Fitness) or stayed about the same (Healthcare). The slowed interactions likely occurred due to companies thinning out their communications to deprioritize non-essential tasks and messages in order to prioritize COVID-related messaging. But while interactions were lower than the macro average, average response rates were higher in both Medical (95%) and Fitness (95%) than the macro average of 92%.

The retention gap between Fans and Risks broadened in Healthcare, and Risks were more likely to churn than Fans. This was not the case at the macro level where risk of churn was almost equal for Fans and Risks. This change is also supported by looking at Shifted Emotions (-2%, macro average is -4%). Few Healthcare consumers shifted their emotions in 2020, which means being proactive about engagement and focusing on understanding why people shift from Fan to Risk is even more important for mobile teams in 2021.

Average survey response rates were a combined 9% for Healthcare apps. Medical apps saw a 14% response rate and Fitness apps saw a 5% response rate, both lower than the 16% macro average (but still much higher than the industry average of 1%). In order to boost response rates, a 2021 focus should be on revisiting in-app survey strategies and surveying a larger number of consumers. Medical apps surveyed 24% of their consumers, while Fitness apps surveyed 14% (macro average is 25%). The broader your customer voice, the more accurate picture you'll get of your consumer base.

Personal Services

Personal Services

Subcategories: Home and Family

> " We're not going to just go back to the way things were. This is a tectonic shift that we expect to play out for years to come. No company in our industry is better positioned than Zillow to deliver on seismic shifts in technology adoption. Zillow recreated what it meant to search and find real estate, and we are now investing to recreate and digitize the transaction itself."

RICH BARTON
CEO, Zillow

Ratings and Reviews

Average Number of Ratings

653,027
96,182

Home	779,851	117,095
Family	18,904	2,072

Average Star Rating

★★★★★ 4.75

★★★★☆ 4.03

Home	4.8	4.34
Family	4.5	2.6

Average Number of Reviews

691
2,226

Home	754	2,687
Family	407	611
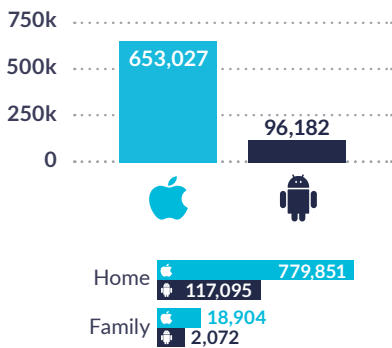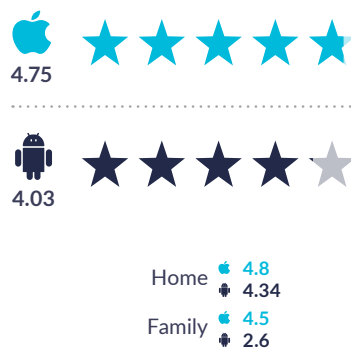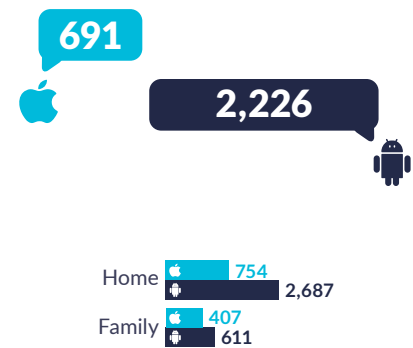
App Store Ratings Distribution

iOS

	★	★★	★★★	★★★★	★★★★★
Personal Services	3%	1%	3%	12%	81%
Home	2%	1%	3%	12%	82%
Family	8%	1%	4%	14%	73%

Android

	★	★★	★★★	★★★★	★★★★★
Personal Services	17%	3%	4%	14%	62%
Home	8%	3%	4%	15%	70%
Family	51%	5%	5%	9%	30%

Retention

Average 90-day Retention

59%

Personal Services

Home	**59%**
Family	**55%**

Average Annual Retention

41%
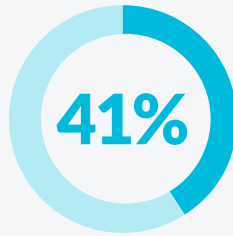
Personal Services

Home	**41%**
Family	**25%**

90-Day Retention After Love Dialog

79%
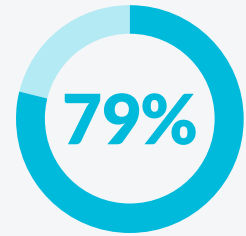
Personal Services

Home	**79%**
Family	**82%**

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Personal Services — *Blended* — *iOS* — *Android*

Home — *Blended* — *iOS* — *Android*
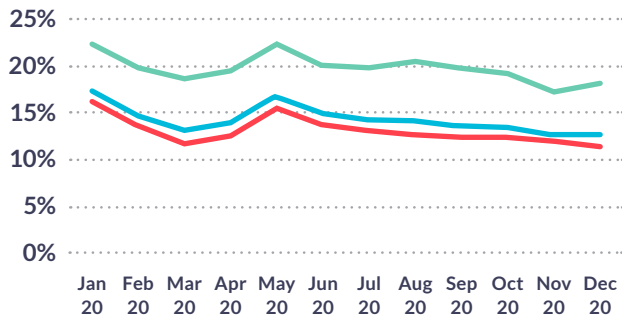
COVID's Impact on Monthly Response Rates

Personal Services — *Blended* — *iOS* — *Android*
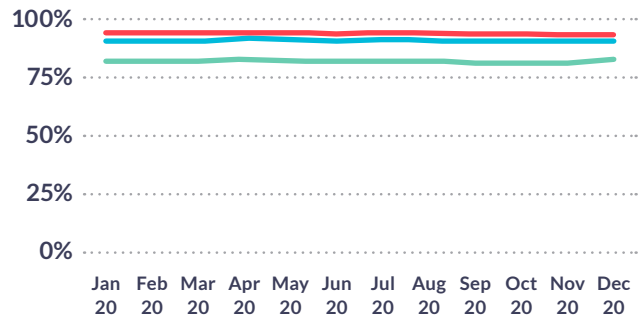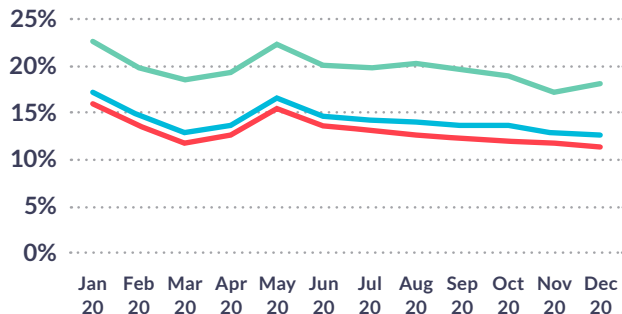
Home — *Blended* — *iOS* — *Android*

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Family — Blended — iOS — Android

COVID's Impact on Monthly Response Rates

Family — Blended — iOS — Android

Average Interaction Rate

45%

Personal Services

Home	**45%**
Family	**34%**

Average Response Rate to Interactions

93%

Personal Services

Home	**93%**
Family	**96%**

Popular Phrases

Thank you	Real estate	User friendly
Click on	Please fix	Doesn't work	Price range
Internet connection	Log in	Keep crashing

Popular Phrases with Sentiment Distribution

■ *Negative* ■ *Neutral* ■ *Positive*

Phrases (y-axis):
thank you, real estate, user friendly, click on, please fix, doesn't work, price range, internet connection, log in, keep crashing, network error, last update, pop up, customer service, saved search, search result, zip code, phone number, turned off, won't load, saved home, sign up, stopped working, scroll through, social media, dark mode, interest rate, search criteria, street view, rental property

x-axis: 0, 200, 400, 600, 800
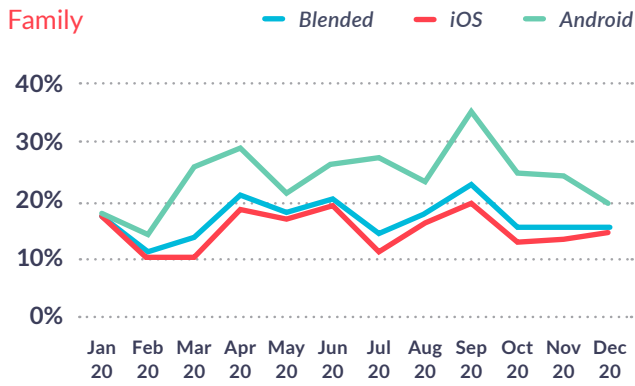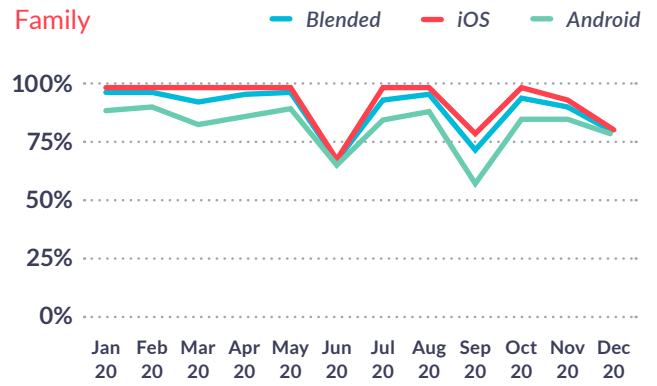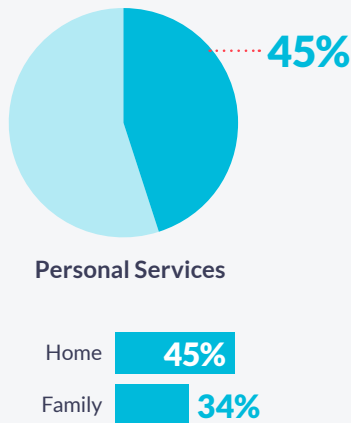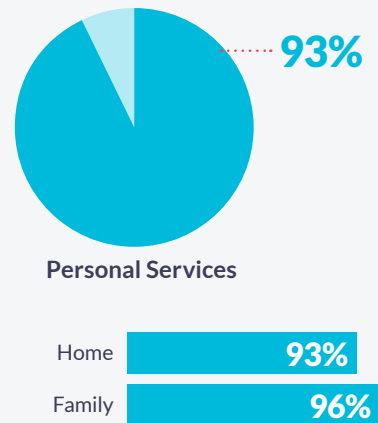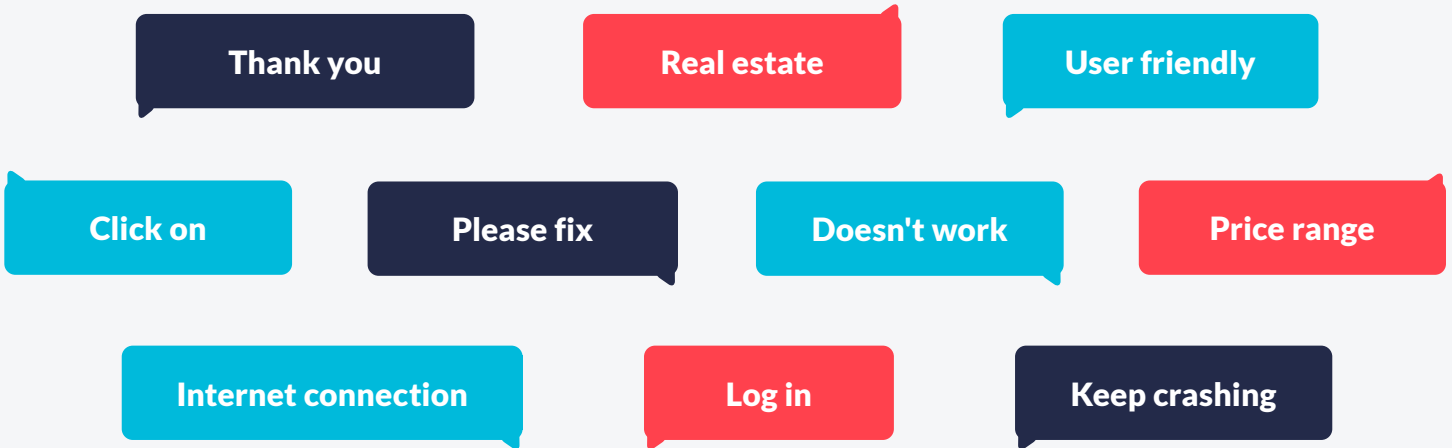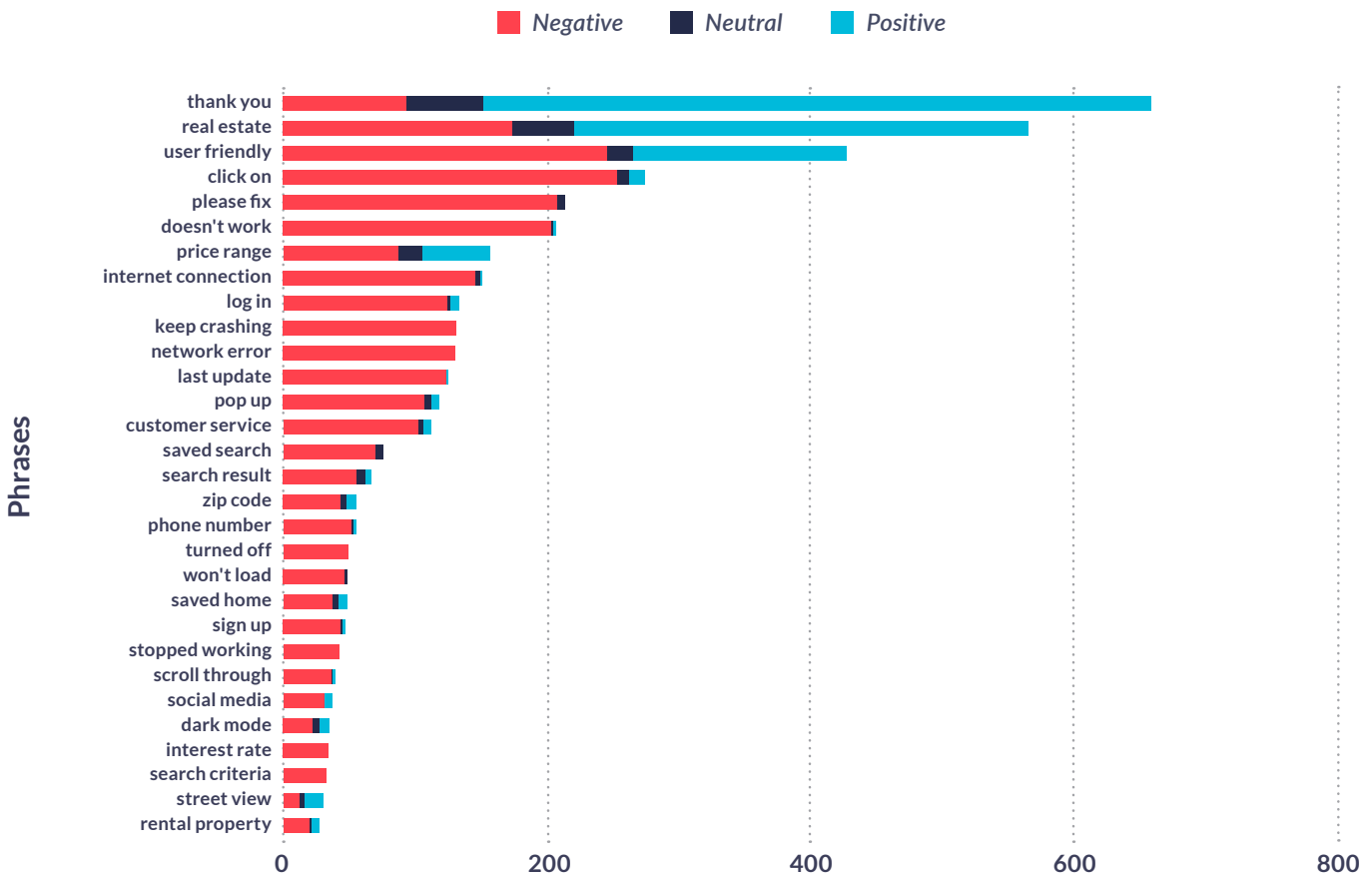
Mobile Consumer Sentiment

Love Dialog Conversion Rate

Personal Services

96%

93%
Blended

86%

Home

Blended **93%**
 96%
 86%

Family

Blended **97%**
 99%
 90%
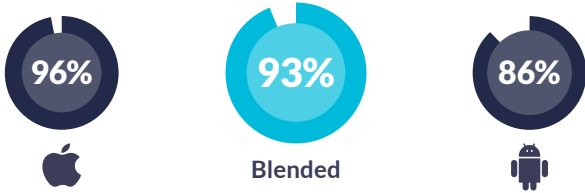
Love Percent

Personal Services

56%

58%
Blended

64%

Home

Blended **58%**
 56%
 64%

Family

Blended **64%**
 65%
 60%
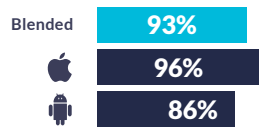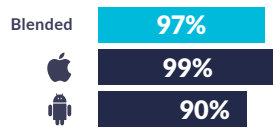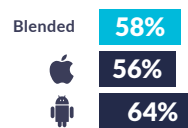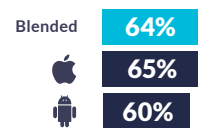
Retention Rates for Fans and Risks

Personal Services

90-day Retention

81%
Fans

77%
Risks

Annual Retention

58%
Fans

54%
Risks
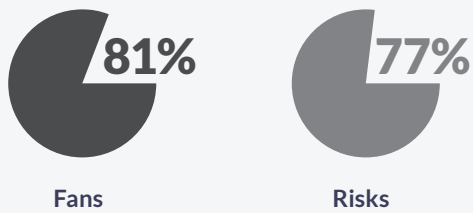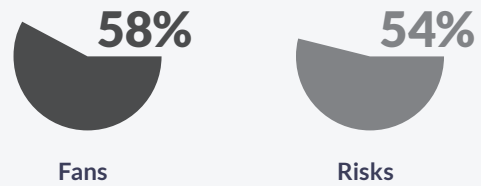
Home

90-day Retention

Fans: **81%**
Risks: **77%**

Annual Retention

Fans: **58%**
Risks: **54%**

Family

90-day Retention

Fans: **85%**
Risks: **78%**

Annual Retention

Fans: **56%**
Risks: **49%**

Expressed Consumer Emotion by Segment in 2020

Personal Services

New Fans
Customers who have expressed positive emotion for the first time

Blended **31%**

 28%

 43%

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended **20%**

 22%

 17%

New Risks
Customers who have expressed negative emotion for the first time

Blended **22%**

 22%

 25%

Repeat Risks
Customers who have expressed negative emotion at least twice in a row

Blended **12%**

 14%

 7%

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended **7%**

 7%

 5%

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended **7%**

 8%

 5%

Shifted Emotions

Blended **-5%**

 -4%

 -9%

Home

New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended: **31%**	Blended: **20%**	Blended: **22%**	Blended: **12%**	Blended: **7%**	Blended: **7%**	Blended: **-5%**
iOS: **28%**	iOS: **22%**	iOS: **22%**	iOS: **14%**	iOS: **7%**	iOS: **8%**	iOS: **-4%**
Android: **43%**	Android: **17%**	Android: **25%**	Android: **7%**	Android: **5%**	Android: **5%**	Android: **-9%**

Family

New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended: **32%**	Blended: **27%**	Blended: **18%**	Blended: **9%**	Blended: **7%**	Blended: **8%**	Blended: **-10%**
iOS: **31%**	iOS: **29%**	iOS: **16%**	iOS: **9%**	iOS: **7%**	iOS: **8%**	iOS: **-11%**
Android: **33%**	Android: **22%**	Android: **23%**	Android: **10%**	Android: **6%**	Android: **7%**	Android: **-7%**

Surveys and Messages

Average Response Rate for In-app Surveys

10%

Personal Services

Home **15%**

Family **9%**

Average Response Rate to Note-linked Surveys

18%
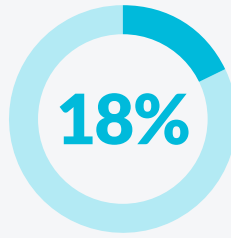
Personal Services

Home **18%**

Family **N/A**

Percentage of People Prompted for Surveys

1%

Personal Services

Home **0.4%**

Family **50%**

Summary of Personal Services Apps in 2020

Personal Services apps are separated into two subcategories: Home (real estate, property management, connected devices, etc.) and Family (child milestone tracking, family schedule management, etc.).

Generally, apps in Personal Services had a strong year for consumer engagement and saw little marketplace impact. Neither interaction rates nor response rates saw significant month-over-month shifts, and both were above macro averages (the Personal Services interaction rate was 45% compared to the macro average of 26%; response rate was 93% compared to the macro average of 92%). Personal Services apps saw strong 90-day retention (48%) and annual retention (41%)—macro averages are 48% and 35%—and pulled in three times the number of ratings most other app categories saw, while keeping star ratings and number of reviews high.

An exception to macro benchmarks is around how many Personal Services consumers shifted their emotions. The macro average for shifted emotions is -4%; apps in Home were slightly above the macro average at -5%, but apps in Family saw a -10% shift in consumer emotion. Because such a high number of consumers in this category shifted emotions in 2020, there is a big opportunity for brands to help proactively influence the outcome. In 2021, Personal Services apps must tap into this segment of shifting emotions to understand why people are unhappy and to fix what went wrong.

One way Personal Services mobile teams can focus on reaching consumers is through in-app surveys. While Family apps are surveying a large number of consumers (50%), apps in the Home category are only surveying .4% of their consumers, which is extremely low. Basing product decisions on less than 1% of your brand's consumer base is a flawed and dangerous strategy. In order to prevent churn and increase loyalty, brands should use 2021 to expand the number of consumers they hear from and ultimately take action on their feedback to improve in-app experiences.

Shopping

> COVID was less about change that no one saw coming [than] a massive acceleration of change that was already in place. Two things in particular. One, the shift to digital...The other piece is the business model. We have been evolving our business model and certainly one of the driving factors in that is not just the shift to digital, but the changing role of stores as we fill more orders out of stores and do more order pick-up, having those capabilities and really having to change the organizational model that we have in stores. COVID accelerated both those things in a big way. And yes, I would say, we would not be where we're at today if it wasn't for COVID. I mean that got us very focused on embracing the new world where we're a majority digital [retailer]."

ERIK NORDSTROM
CEO, Nordstrom

Ratings and Reviews

Average Number of Ratings

250k
150k — 183,873
50k — 163,751
0

eCommerce 167,676	225,039
Retail 215,110	30,031

Average Star Rating

★★★★ 4.65

★★★★ 4.36

eCommerce	4.57 / 4.32
Retail	4.79 / 4.45

Average Number of Reviews

488

7,549

eCommerce	524 / 10,050
Retail	420 / 2,094
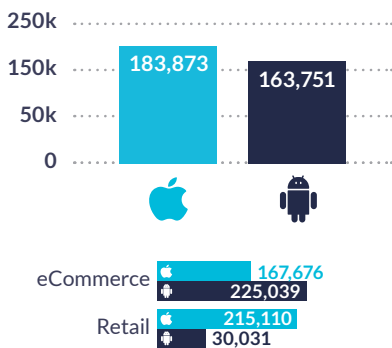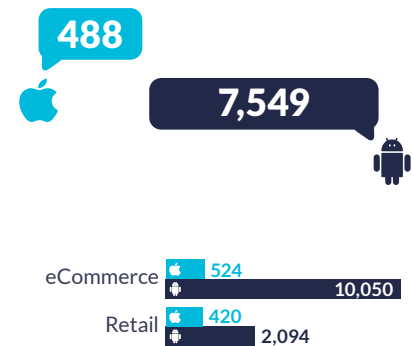
App Store Ratings Distribution

iOS

	★	★★	★★★	★★★★	★★★★★
Shopping	5%	1%	3%	11%	80%
eCommerce	6%	1%	4%	11%	78%
Retail	3%	1%	3%	9%	84%

Android

	★	★★	★★★	★★★★	★★★★★
Shopping	9%	3%	4%	13%	71%
eCommerce	10%	3%	4%	13%	70%
Retail	7%	3%	4%	12%	74%

Retention

Average 90-day Retention
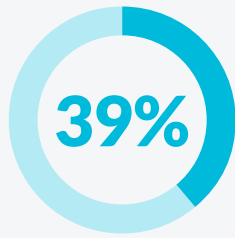
39%

Shopping

eCommerce **34%**
Retail **54%**

Average Annual Retention

25%

Shopping

eCommerce **20%**
Retail **41%**

90-Day Retention After Love Dialog

67%

Shopping
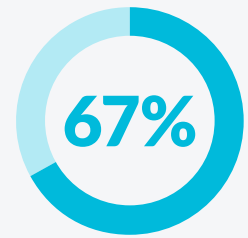
eCommerce **61%**
Retail **83%**

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Shopping — Blended — iOS — Android
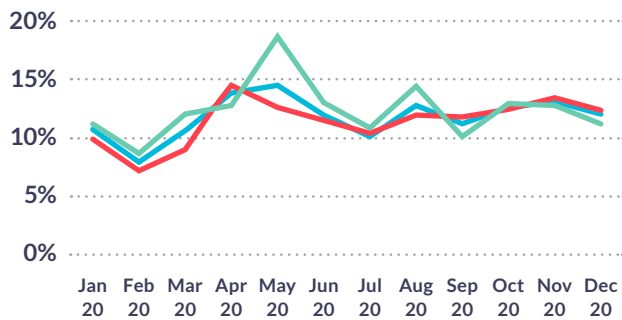
COVID's Impact on Monthly Response Rates

Shopping — Blended — iOS — Android
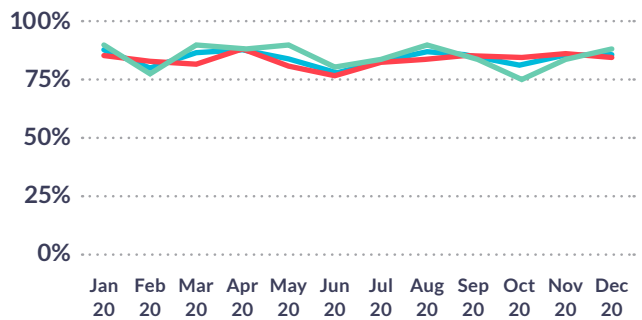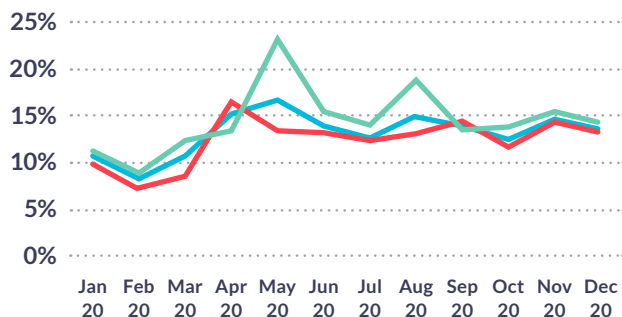
eCommerce — Blended — iOS — Android

eCommerce — Blended — iOS — Android

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Retail

— Blended   — iOS   — Android

COVID's Impact on Monthly Response Rates

Retail

— Blended   — iOS   — Android

Average Interaction Rate

22%

Shopping

eCommerce **24%**

Retail **19%**

Average Response Rate to Interactions

91%

Shopping

eCommerce **94%**

Retail **84%**

Popular Phrases

Thank you   Customer service   Works well

User friendly   Please fix   New update   Sign in

Doesn't work   Phone number   Bring back

Popular Phrases with Sentiment Distribution

Legend: Negative · Neutral · Positive

Phrases (top to bottom): thank you, customer service, works well, user friendly, please fix, new update, sign in, doesn't work, phone number, bring back, dark mode, set up, long time, pick up, online shopping, credit card, keep crashing, won't load, no response, sign up, many ad, error message, internet connection, email address, buena calidad, dark theme, went wrong, free shipping, shopping experience, home page

X-axis: 0, 1,000, 2,000, 3,000, 4,000
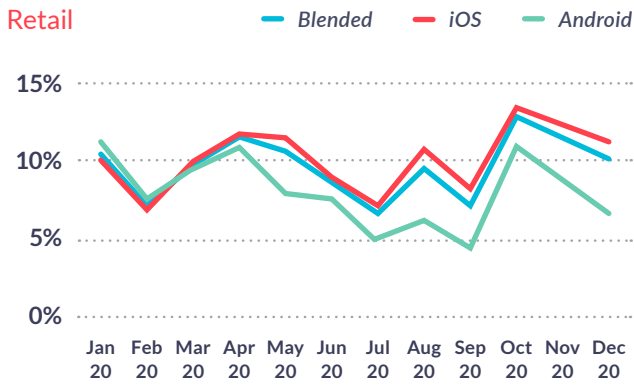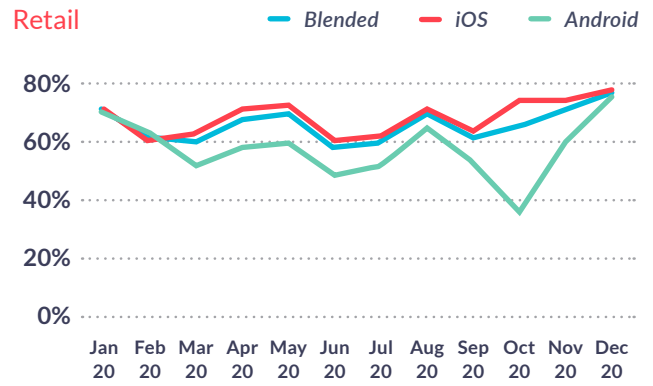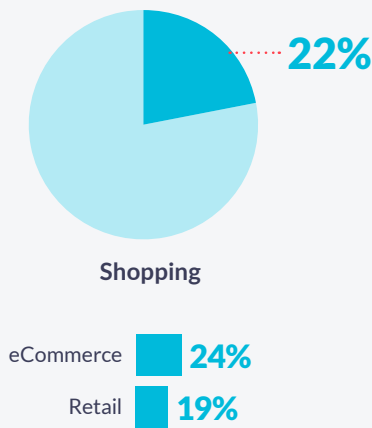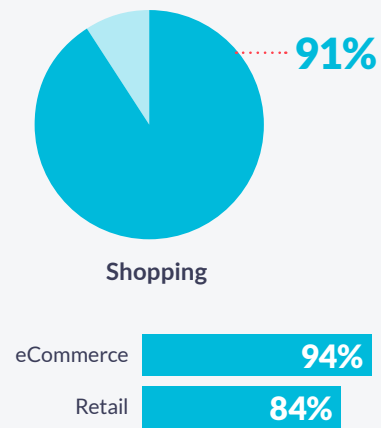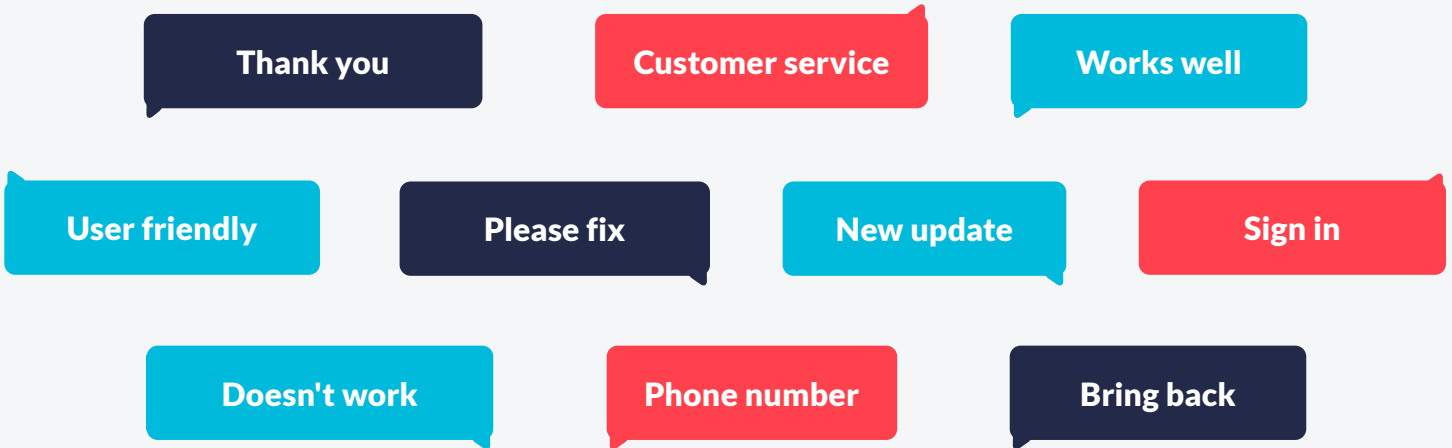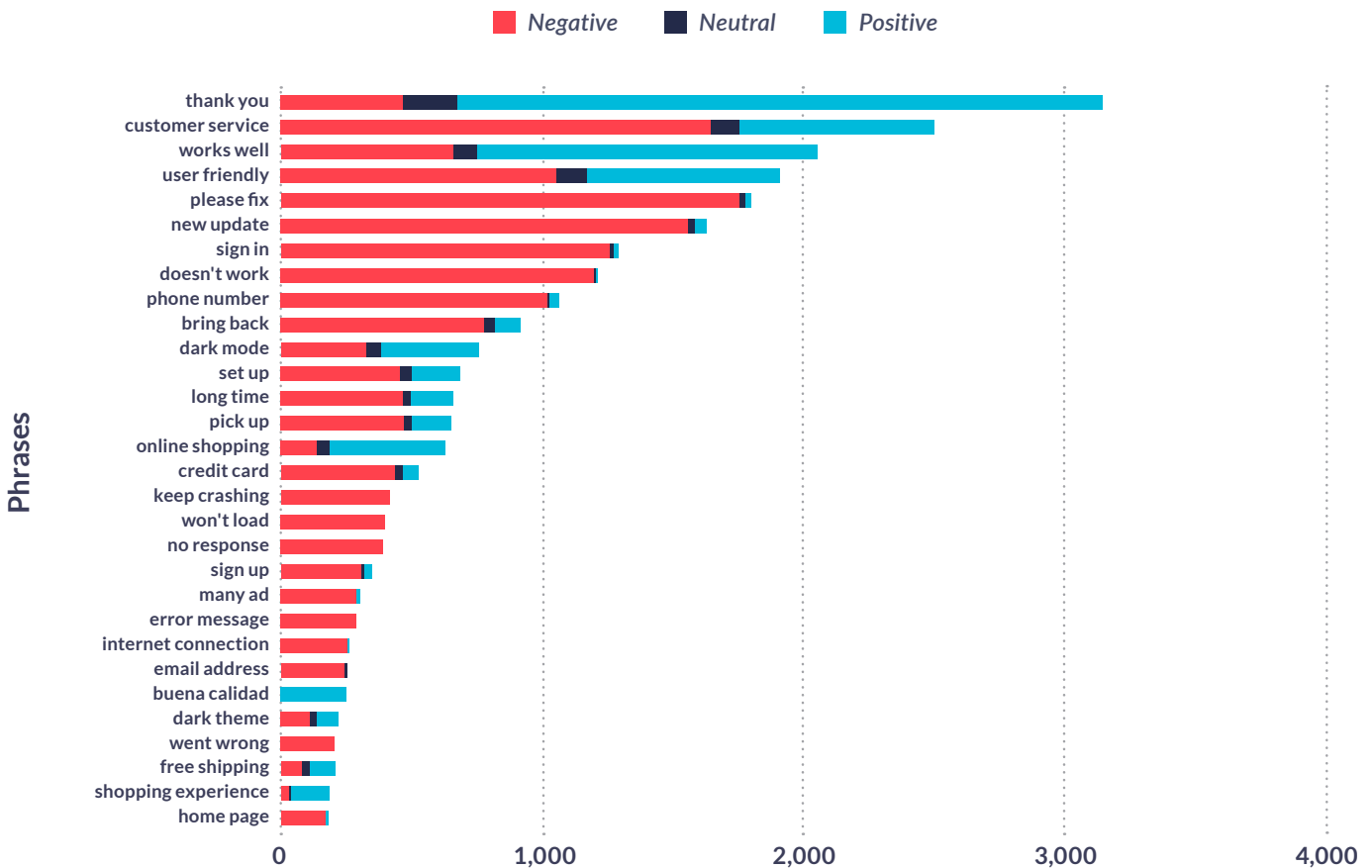
Mobile Consumer Sentiment

Love Dialog Conversion Rate

Shopping
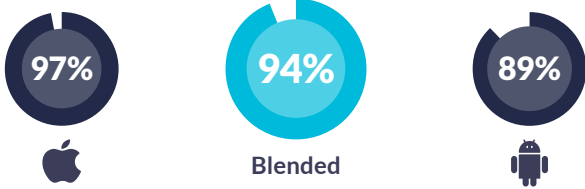
97%

94%
Blended

89%

eCommerce

Blended **95%**

98%

91%

Retail

Blended **92%**

96%

78%

Love Percent

Shopping

66%

66%
Blended

66%

eCommerce

Blended **64%**

63%

65%

Retail

Blended **70%**

70%

70%
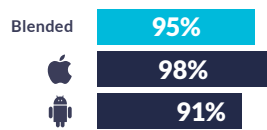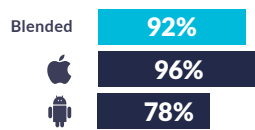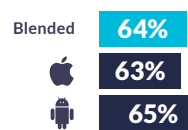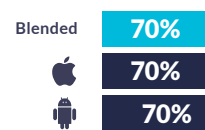
Retention Rates for Fans and Risks

Shopping

90-day Retention

68%
Fans

69%
Risks

Annual Retention

49%
Fans

48%
Risks
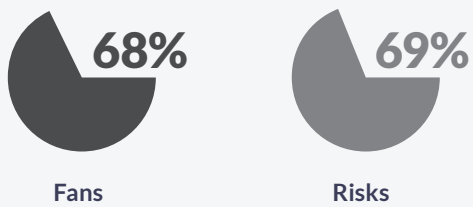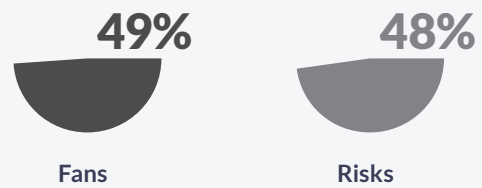
eCommerce

90-day Retention

Fans: **64%**
Risks: **63%**

Annual Retention

Fans: **46%**
Risks: **46%**

Retail

90-day Retention

Fans: **84%**
Risks: **86%**

Annual Retention

Fans: **61%**
Risks: **58%**

Expressed Consumer Emotion by Segment in 2020

Shopping

New Fans
Customers who have expressed positive emotion for the first time

Blended	**30%**
(Apple)	**29%**
(Android)	**31%**

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended	**28%**
(Apple)	**29%**
(Android)	**27%**

New Risks
Customers who have expressed negative emotion for the first time

Blended	**15%**
(Apple)	**15%**
(Android)	**16%**

Repeat Risks
Customers who have expressed negative emotion at least twice in a row

Blended	**12%**
(Apple)	**12%**
(Android)	**12%**

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended	**7%**
(Apple)	**8%**
(Android)	**7%**

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended	**8%**
(Apple)	**8%**
(Android)	**7%**

Shifted Emotions
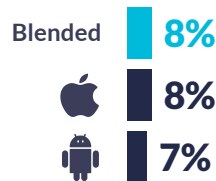
Blended	**-2%**
(Apple)	**-1%**
(Android)	**-4%**
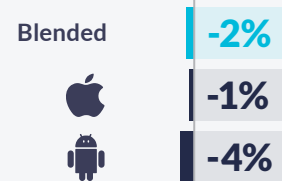
eCommerce

New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended: **27%**	Blended: **28%**	Blended: **15%**	Blended: **14%**	Blended: **8%**	Blended: **8%**	Blended: **-1%**
iOS: **25%**	iOS: **29%**	iOS: **14%**	iOS: **14%**	iOS: **8%**	iOS: **8%**	iOS: **+1%**
Android: **29%**	Android: **27%**	Android: **16%**	Android: **13%**	Android: **7%**	Android: **8%**	Android: **-4%**

Retail

New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended: **38%**	Blended: **27%**	Blended: **16%**	Blended: **9%**	Blended: **6%**	Blended: **6%**	Blended: **-6%**
iOS: **37%**	iOS: **27%**	iOS: **15%**	iOS: **7%**	iOS: **6%**	iOS: **7%**	iOS: **-6%**
Android: **43%**	Android: **23%**	Android: **19%**	Android: **5%**	Android: **4%**	Android: **5%**	Android: **-6%**

Surveys and Messages
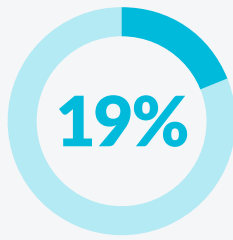
Average Response Rate for In-app Surveys	Average Response Rate to Note-linked Surveys	Percentage of People Prompted for Surveys	Inbound Message Response Rate
19%	**18%**	**28%**	**43%**
Shopping	Shopping	Shopping	Shopping
eCommerce **17%**	eCommerce **13%**	eCommerce **17%**	eCommerce **49%**
Retail **22%**	Retail **52%**	Retail **53%**	Retail **21%**
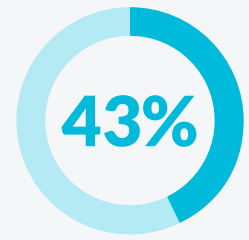
Summary of Shopping Apps in 2020

Digital shopping exploded in 2020, with an increase in both consumers and usage. In our data, Shopping apps are divided into two subcategories due to vastly different consumer behavior: eCommerce (transactions are completed electronically and experiences are solely digital) and Retail (connected digital and brick-and-mortar consumer experiences).

Pandemic-driven lockdowns had a positive impact on interactions for Shopping apps in both subcategories. Rather than scrambling to close growing consumer retention holes, they focused on testing new ways to engage the increased number of consumers in their apps. Both subcategories ended up with a higher percentage of monthly interactions at year-end than in January. Both eCommerce (94%) and Retail (84%) saw consistently high consumer response rates (macro average is 92%) throughout the year in response to the influx of new interactions.

These new interactions led to improved retention. Shopping apps typically see relatively low retention due to high marketplace competition and consumers being loyal to multiple brands at the same time. While Shopping apps saw a 90-day retention rate (39%) and annual retention rate (25%) below or comparable to macro averages (48% and 35%), those numbers are impressively high for the Shopping category. Retail apps stood out even further, beating both the macro 90-day retention rate (54% compared to 48%) and annual retention rate (41% compared to 35%). One interaction Shopping apps

used to attain such high retention rates was surveys, used to regularly touch base with consumers. Their average response rate of 19% was above the macro average of 16%. Retail apps fully embraced the mobile shift forced upon them in 2020 by surveying over half (53%) of their consumers—a 112% increase from the macro average (25%)!

The biggest win in the Shopping apps category is that, collectively, there were few consumers who shifted from Fan to Risk (-2%, macro average is -4%). Specifically within eCommerce, more consumers shifted from Risk to Fan (+1%), which is quite difficult to achieve.

Apptentive

Travel

Travel

Subcategories: Transportation, Hospitality/Tourism, and Auto

> " *2020 was a year like no other. And as the COVID-19 pandemic challenged our industry in ways we have never seen before. Our crew members rose to the occasion and delivered on our mission to inspire humanity. The very foundation of our business model, our culture, our passion, our customer service and our focus on safety, continue to guide us as we march towards recovery."*

ROBIN HAYES
CEO, JetBlue

Ratings and Reviews

Average Number of Ratings

243,532

19,673

	Transportation	Hospitality/Tourism	Auto
iOS	128,183	424,691	62,612
Android	8,505	31,233	25,683

Average Star Rating

★★★★½ 4.67

★★★★☆ 4.05

	Transportation	Hospitality/Tourism	Auto
iOS	4.64	4.7	4.67
Android	3.88	4.19	4.27

Average Number of Reviews

381

1,335

	Transportation	Hospitality/Tourism	Auto
iOS	171	556	565
Android	601	1,619	3,321
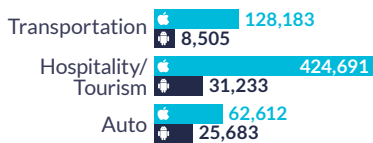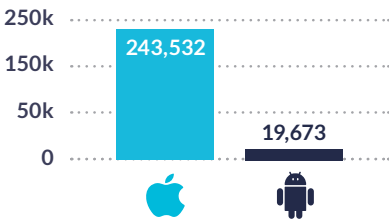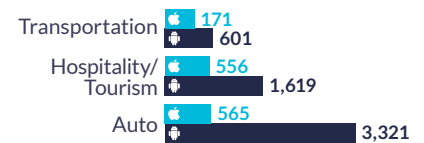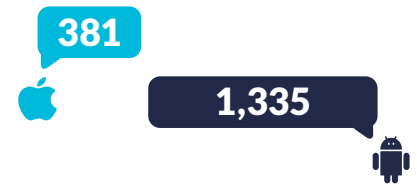
App Store Ratings Distribution

iOS

	★	★★	★★★	★★★★	★★★★★
Travel	3%	1%	3%	11%	82%
Transportation	3%	1%	3%	13%	80%
Hospitality/Tourism	3%	1%	2%	9%	85%
Auto	3%	1%	3%	10%	83%

Android

	★	★★	★★★	★★★★	★★★★★
Travel	15%	3%	5%	15%	62%
Transportation	19%	4%	5%	14%	58%
Hospitality/Tourism	12%	3%	4%	16%	65%
Auto	11%	3%	4%	12%	70%

Retention

Average 90-day Retention
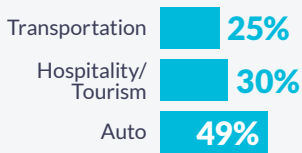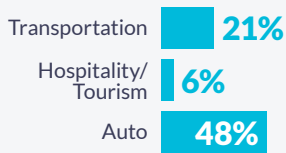
29%

Travel

Transportation	**25%**
Hospitality/ Tourism	**30%**
Auto	**49%**

Average Annual Retention

10%

Travel

Transportation	**21%**
Hospitality/ Tourism	**6%**
Auto	**48%**

90-Day Retention After Love Dialog

48%

Travel

Transportation	**36%**
Hospitality/ Tourism	**62%**
Auto	**81%**

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Travel   — *Blended*   — *iOS*   — *Android*

Transportation   — *Blended*   — *iOS*   — *Android*

COVID's Impact on Monthly Response Rates

Travel   — *Blended*   — *iOS*   — *Android*

Transportation   — *Blended*   — *iOS*   — *Android*

Interaction and Response Rates

COVID's Impact on Monthly Interactions

Hospitality/Tourism
— Blended — iOS — Android

Auto
— Blended — iOS — Android

COVID's Impact on Monthly Response Rates

Hospitality/Tourism
— Blended — iOS — Android

Auto
— Blended — iOS — Android
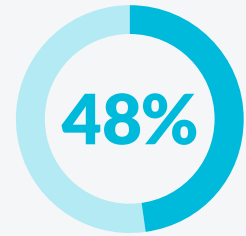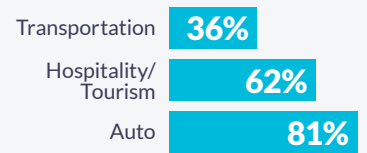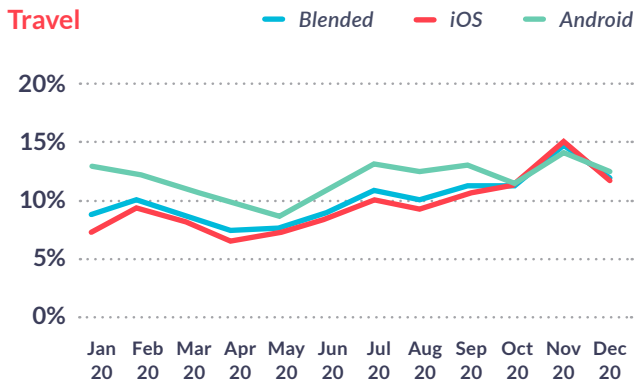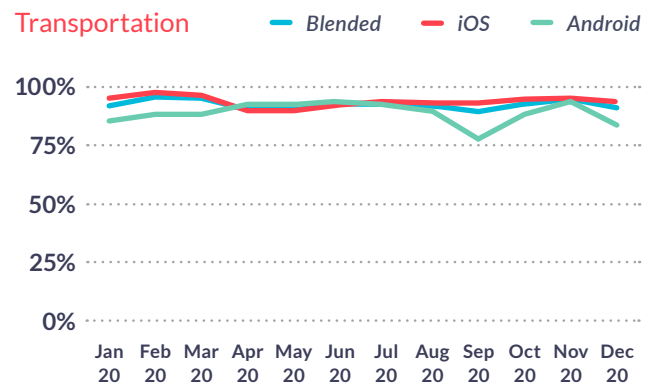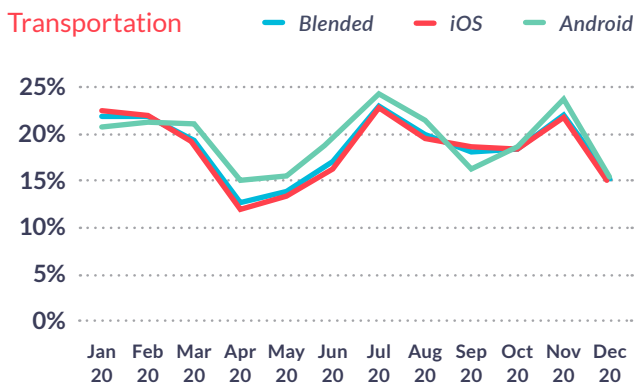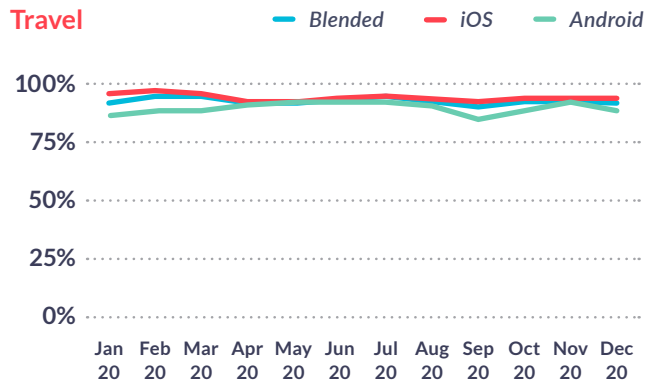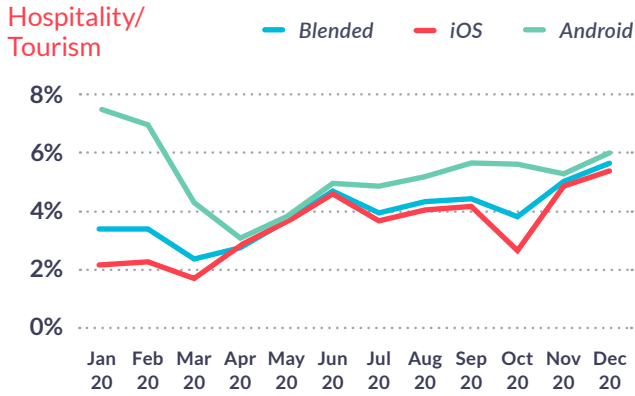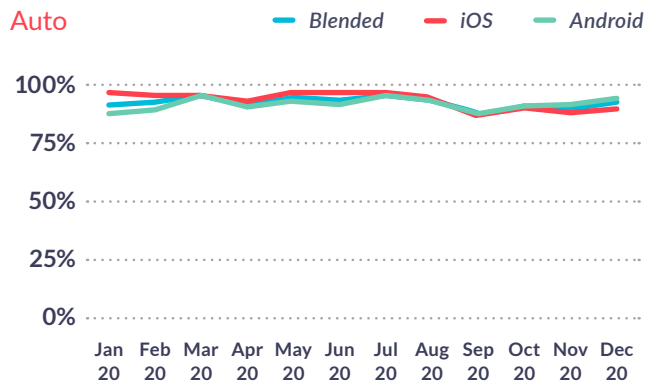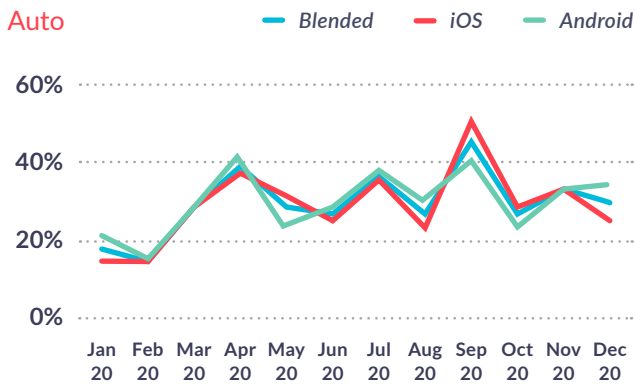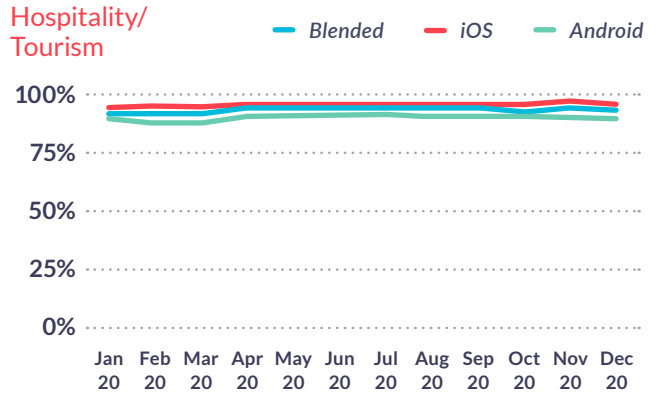
Average Interaction Rate

Travel 18%

Transportation	34%
Hospitality/Tourism	8%
Auto	43%

Average Response Rate to Interactions

Travel 95%

Transportation	94%
Hospitality/Tourism	94%
Auto	96%

Popular Phrases

Customer service

User friendly

Thank you

Doesn't work

Car rental

Log in

Please fix

Works well

Credit card

Pick up

Popular Phrases with Sentiment Distribution

■ *Negative* ■ *Neutral* ■ *Positive*

Phrases (y-axis)

- customer service
- user friendly
- thank you
- doesn't work
- car rental
- log in
- please fix
- works well
- credit card
- pick up
- sign in
- keep crashing
- rental car
- boarding pass
- sign up
- last minute
- several time
- try again
- take forever
- make reservation
- technical issue
- front desk
- phone number
- error message
- stopped working
- internet connection
- user experience
- email address
- buy ticket
- google map

x-axis: 0   250   500   750   1,000

Mobile Consumer Sentiment

Love Dialog Conversion Rate

Travel
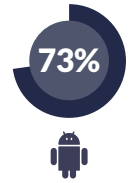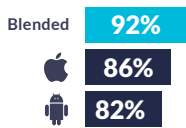
97% 🍎

93% Blended

88% 🤖

Transportation
Blended **92%**
🍎 **86%**
🤖 **82%**

Hospitality/Tourism
Blended **95%**
🍎 **97%**
🤖 **91%**

Auto
Blended **96%**
🍎 **98%**
🤖 **94%**

Love Percent

Travel

67% 🍎

69% Blended

73% 🤖

Transportation
Blended **63%**
🍎 **61%**
🤖 **68%**
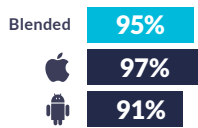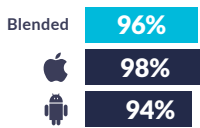
Hospitality/Tourism
Blended **75%**
🍎 **75%**
🤖 **74%**
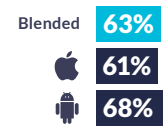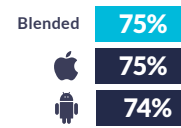
Auto
Blended **77%**
🍎 **75%**
🤖 **79%**
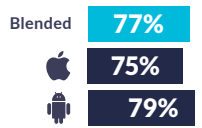
Retention Rates for Fans and Risks

Travel

90-day Retention

52% Fans

42% Risks

Annual Retention

36% Fans
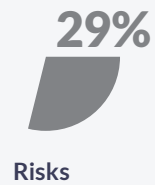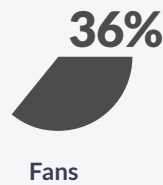
29% Risks

Transportation

90-day Retention
Fans: **37%**
Risks: **32%**

Annual Retention
Fans: **27%**
Risks: **25%**

Hospitality/Tourism

90-day Retention
Fans: **69%**
Risks: **51%**

Annual Retention
Fans: **43%**
Risks: **38%**

Auto

90-day Retention
Fans: **82%**
Risks: **79%**

Annual Retention
Fans: **55%**
Risks: **51%**

Expressed Consumer Emotion by Segment in 2020

Travel

New Fans
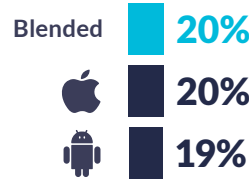*Customers who have expressed positive emotion for the first time*
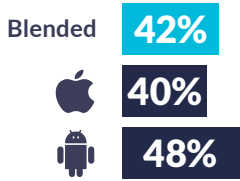
Blended	**42%**
	40%
	48%

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended	**23%**
	24%
	21%

New Risks
Customers who have expressed negative emotion for the first time

Blended	**20%**
	20%
	19%

Repeat Risks
Customers who have expressed negative emotion at least twice in a row

Blended	**5%**
	6%
	4%

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended	**4%**
	5%
	3%

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended	**5%**
	5%
	4%
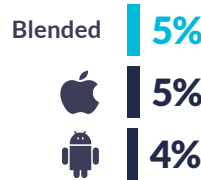
Shifted Emotions
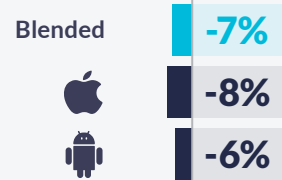
Blended	**-7%**
	-8%
	-6%

Transportation

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	**53%**	**8%**	**31%**	**3%**	**2%**	**3%**	**17%**
iOS	**51%**	**9%**	**31%**	**4%**	**2%**	**3%**	**18%**
Android	**59%**	**6%**	**29%**	**2%**	**1%**	**2%**	**8%**

Hospitality/Tourism

	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	**33%**	**35%**	**12%**	**7%**	**6%**	**7%**	**-4%**
iOS	**28%**	**40%**	**10%**	**8%**	**7%**	**8%**	**-4%**
Android	**43%**	**26%**	**15%**	**5%**	**4%**	**5%**	**-5%**

Auto

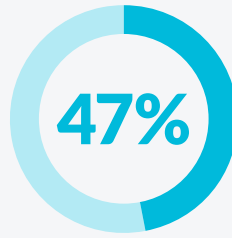|	New Fans	Repeat Fans	New Risks	Repeat Risks	Reclaimed Fans	Lost Fans	Shifted Emotions
Blended	**39%**	**34%**	**11%**	**5%**	**5%**	**6%**	**-6%**
iOS	**34%**	**36%**	**11%**	**6%**	**6%**	**7%**	**-6%**
Android	**43%**	**32%**	**11%**	**4%**	**4%**	**5%**	**-7%**

Surveys and Messages

Average Response Rate for In-app Surveys	Average Response Rate to Note-linked Surveys	Percentage of People Prompted for Surveys
19% Travel	**47%** Travel	**16%** Travel

Transportation **15%**	Transportation **35%**	Transportation **13%**
Hospitality/Tourism **5%**	Hospitality/Tourism **14%**	Hospitality/Tourism **15%**
Auto **38%**	Auto **67%**	Auto **35%**

Summary of Travel Apps in 2020

Travel was one of the hardest-hit industries in 2020. Due to interstate, national, and global travel restrictions brought on by COVID-19, no part of the Travel industry was spared from extreme marketplace shakeup. Particularly, the subcategories of Transportation and Hospitality/Tourism apps faced immense challenges that reflect in their consumer data across the board. The Auto subcategory fared better than the rest, with most of its benchmarks at or slightly higher than macro averages.

COVID-19 had the strongest negative impact on interactions in Travel apps over all other app categories in our research. Interaction rates for Travel apps were 18%, lower than the macro average of 26% (Hospitality/Tourism was most impacted with an interaction rate of only 8%). Most Travel apps' monthly interactions were impacted heavily through May then began to slowly recover, reaching January levels nearing the end of the year. During Q1 and Q2, it was important for Travel apps to tone down their non-essential communication as COVID-19 restrictions changed their business, and most brands only communicated urgent changes to consumers. The uptick in interaction rates in summer and later months were strongly driven by brands communicating changes to consumers in their apps. That said, Travel mobile teams deserve immense credit for their extremely high response rates (94%+ across all subcategories) that held steady throughout the year. These teams clearly understand that when consumers reach out, responding to understand and act on emotion is the best strategy.

While Travel apps ratings and reviews were around or even slightly higher than macro averages, consumer retention tells a concerning tale. 90-day retention for Travel apps was lower than the macro average at 29% (average is 48%), with Transportation apps falling as low as 25%. For comparison, Travel apps had a 90-day retention rate of 43% in 2019—a -33% year-over-year decrease. Annual retention is even more concerning at 10%, well below the macro average of 35%. Again for comparison, annual retention for Travel apps in 2019 was 34%—a 71% year-over-year drop. Transportation apps performed slightly better at 21% although still below average, and Hospitality/Tourism apps were critically impacted, ending the year at 6% annual retention. Consumers either jumped ship or were considered "churned" due to inactivity—a concerning but solvable problem for mobile teams in 2021.

While Travel apps' consumer sentiment was mostly comparable to macro averages across Love Dialog conversion rate and Love Percent, consumer retention rates were less comparable between self-identified Fans and Risks. Consumer retention was noticeably lower for Risks (90-day was 42%, macro was 73%; annual was 29%, macro was 50%) than it was for Fans (90-day was 52%, macro was 75%; annual was 36%, macro was 54%), although both were lower than macro averages. Importantly, the percentage of Shifted Emotions across Travel apps (-7%) was almost double the macro average (-4%).

As the data shows, Travel apps are beginning to recover, but still have a long road ahead.

Utilities

Utilities

> "The immediate impact on the manufacturing industry depends on the sector. Overall, the odd effects we've seen in buying behavior and consumer reactions are profoundly disrupting manufacturing planning. Manufacturers should be looking at modernizing tools, technologies, and processes that motivate the next generation of workforce, new business models that include technology partnerships, and a digital infrastructure that supports increased ability and business efficiency."

RENE WOLF
Senior VP Manufacturing Operations
Management Software, Siemens

Ratings and Reviews
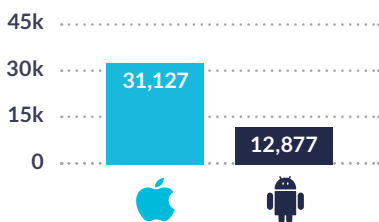
Average Number of Ratings

45k
30k   31,127
15k   12,877
0

Average Star Rating

🍎 ★★★★⯪
4.58

🤖 ★★★★☆
3.96

Average Number of Reviews

319
1,223

App Store Ratings Distribution

iOS	★	★★	★★★	★★★★	★★★★★
	4%	1%	3%	20%	72%

Android	★	★★	★★★	★★★★	★★★★★
	17%	4%	4%	12%	63%
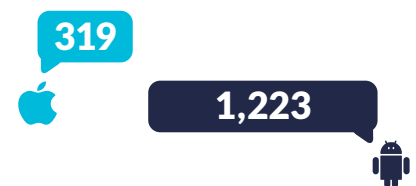
Retention
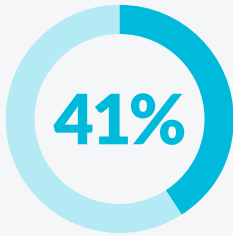
Average 90-day Retention	Average Annual Retention	If someone saw an **interaction in the first 90 days**, their retention rate was	If the interaction was a **Love Dialog**, their retention rate was
41%	**19%**	**80%**	**80%**

Interaction and Response Rates

COVID's Impact on Monthly Interactions

— Blended — iOS — Android

COVID's Impact on Monthly Response Rates

— Blended — iOS — Android

2020 Average Interaction Rate

18%

2020

2020 Average Response Rate

94%

2020

Popular Phrases

Log in
Credit card
Customer service
Doesn't work
Try again
Gas station
Please fix
Set up
Went wrong
Thank you

Popular Phrases with Sentiment Distribution

■ *Negative*   ■ *Neutral*   ■ *Positive*

Phrases

Phrase	
log in	
doesn't work	
set up	
credit card	
try again	
went wrong	
thank you	
gas station	
customer service	
please fix	
works well	
user friendly	
last update	
sign up	
petrol station	
apple pay	
payment method	
error message	
phone number	
keep crashing	
filling up	
no response	
stopped working	
email address	
highly recommend	
won't load	
debit card	
security system	
push notification	
samsung galaxy	

0   100   200   300

Mobile Consumer Sentiment

Love Dialog Conversion Rate
Consumers who responded "Yes" or "No" to Love Dialog prompts

96% 🍎

94% Blended

91% 🤖

Love Percent
Total consumers who respond "Yes" to Love Dialog prompts

75% 🍎

76% Blended

77% 🤖

Retention Rates for Fans and Risks
Fans are "Yes" responses, Risks are "No" responses

90-day Retention

81% Fans

78% Risks

Annual Retention

67% Fans

60% Risks

Expressed Consumer Emotion by Segment in 2020

New Fans
Customers who have expressed positive emotion for the first time

Blended	49%
🍎	43%
🤖	59%

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended	26%
🍎	30%
🤖	27%

New Risks
Customers who have expressed negative emotion for the first time

Blended	16%
🍎	15%
🤖	18%

Repeat Risks
Customers who have expressed negative emotion at least twice in a row

Blended	3%
🍎	3%
🤖	2%

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended	3%
🍎	4%
🤖	2%

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended	4%
🍎	4%
🤖	2%

Shifted Emotions

Blended	-6%
🍎	-6%
🤖	-5%

Surveys and Messages

Average Survey Response Rate

27% 🍎

26% Blended

23% 🤖

Average Response Rate to Note-linked Surveys

79% 🍎

81% Blended

83% 🤖

Percentage People Prompted for Surveys

37% 🍎

31% Blended

22% 🤖

Inbound Message Response Rate

For every inbound message sent by consumers,

69%

were responded to by brands.

Summary of Utilities Apps in 2020

One size did not fit all for Utilities apps in 2020. Depending on industry (energy, manufacturing, security, et. al.), issues with supply chains, global price drops, and budget constraints impacted each brand differently. But regardless of their business focus, mobile teams working in Utilities showed great emphasis on collaboration and flexibility that will continue to change how apps are designed, built, and leveraged across their business in years to come.

Collectively, Utilities apps had 90-day retention rates slightly lower than the macro average (48%) and much lower than the annual average (35%). But when consumers were proactively engaged, their short-term and long-term retention rates rose significantly and ended higher than macro averages (80% for both). This was true for both Fans and Risks. Retention tends to dramatically improve when people are engaged, which consumers of Utilities apps made abundantly clear.

Utilities mobile teams also increased the percentage of people they prompted for feedback in 2020 to 31%, which is higher than the macro average of 25%. In return, they saw incredibly high response rates (81% compared to the 60% macro average) across both operating systems. By prioritizing consumer voices, the strong majority of their consumers categorized themselves as Fans (78%) while only 23% were Risks.
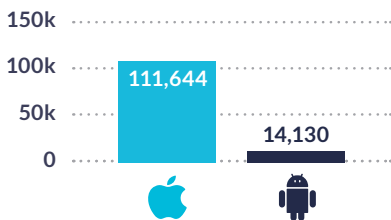
Business Services

Business Services

> **"** I've always believed in the adage 'Never waste a crisis,' and during this one I've tried to encourage Slack's executive team, employees, customers, and investors to lean into that idea. Covid-19 has created an opportunity for us and others to become more agile, to take on changes that once seemed daunting, to reimagine organizational culture, to rethink work plans and productivity, to learn from and rapidly correct mistakes, and to reposition for future growth. Perhaps most important, Slack has refocused on our core goal—to help our customers work more efficiently and more productively."
>
> **STEWART BUTTERFIELD**
> CEO, Slack

Ratings and Reviews

Average Number of Ratings

- 111,644 (Apple)
- 14,130 (Android)

Average Star Rating

- Apple: 4.58 ★★★★☆
- Android: 3.89 ★★★★☆

Average Number of Reviews

- 368 (Apple)
- 1,223 (Android)

App Store Ratings Distribution

iOS	★	★★	★★★	★★★★	★★★★★
	4%	1%	3%	11%	80%

Android	★	★★	★★★	★★★★	★★★★★
	19%	4%	5%	12%	60%

Retention

Average 90-day Retention

41%

Average Annual Retention

28%

If someone saw an interaction in the first 90 days, their retention rate was

72%

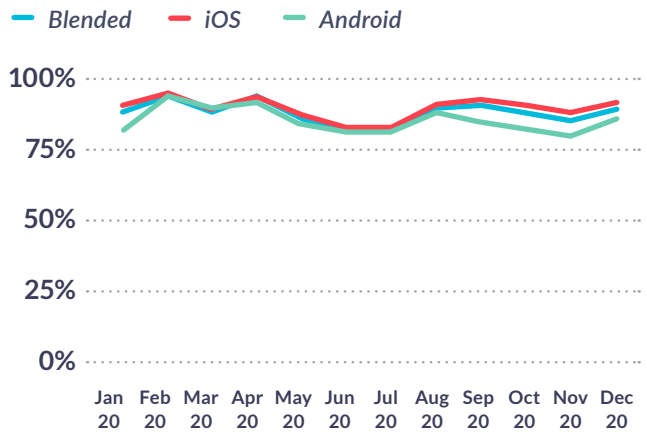**If the interaction was a Love Dialog, their retention rate was**
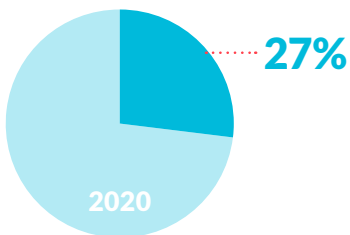
69%

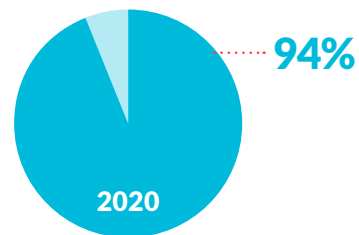# Interaction and Response Rates

COVID's Impact on Monthly Interactions

— *Blended* — *iOS* — *Android*

COVID's Impact on Monthly Response Rates

— *Blended* — *iOS* — *Android*

2020 Average Interaction Rate

27%

2020

2020 Average Response Rate

94%

2020

Popular Phrases

Thank you	Customer service	Log in
Sign up	User friendly	Set up	Tracking number
Doesn't work	Please fix	Try again

Popular Phrases with Sentiment Distribution

■ *Negative*　■ *Neutral*　■ *Positive*

Phrases

thank you
customer service
log in
sign up
user friendly
set up
tracking number
doesn't work
please fix
try again
sign in
works well
pick up
last update
expense report
delivery date
old version
phone number
take forever
live feed
stopped working
delivery service
keep crashing
muy buena
figure out
error message
won't load
text message
email address
turn off

0　　100　　200　　300　　400

Mobile Consumer Sentiment

Love Dialog Conversion Rate
Consumers who responded "Yes" or "No" to Love Dialog prompts

95% (Apple) 92% Blended 85% (Android)

Love Percent
Total consumers who respond "Yes" to Love Dialog prompts

59% (Apple) 59% Blended 60% (Android)

Retention Rates for Fans and Risks
Fans are "Yes" responses, Risks are "No" responses

90-day Retention
72% Fans 66% Risks

Annual Retention
52% Fans 46% Risks

Expressed Consumer Emotion by Segment in 2020

New Fans
Customers who have expressed positive emotion for the first time

Blended	34%
(Apple)	31%
(Android)	41%

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended	21%
(Apple)	23%
(Android)	16%

New Risks
Customers who have expressed negative emotion for the first time

Blended	25%
(Apple)	23%
(Android)	28%

Repeat Risks
Customers who have expressed negative emotion at least twice in a row

Blended	9%
(Apple)	10%
(Android)	6%

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended	5%
(Apple)	6%
(Android)	4%

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended	6%
(Apple)	7%
(Android)	5%

Shifted Emotions

Blended	-5%
(Apple)	-5%
(Android)	-7%

Surveys and Messages

Average Survey Response Rate

9% — Apple

10% — Blended

11% — Android

Average Response Rate to Note-linked Surveys

45% — Apple

48% — Blended

59% — Android

Percentage People Prompted for Surveys

34% — Apple

33% — Blended

30% — Android

Inbound Message Response Rate

For every inbound message sent by consumers,

13% were responded to.

Summary of Business Services Apps in 2020

Brands in the Business Services category faced diverse 2020 challenges. Some companies (like those focused on work collaboration or expense management) faced hurdles early on in the year that flattened as employees became more comfortable working from home. Brands focused on shipping faced challenges with cadences parallel to the impacts on local and national supply chains. Others (like brands in security and monitoring) faced few new challenges outside of their regular business patterns.

The two engagement commonalities in Business Services apps were around the ways consumers behaved within their apps and the ways they felt about their mobile experiences. Luckily, Business Services benchmarks closely matched macro averages across the board, including app store ratings, retention, interaction rate, response rate, Love Percent, and expressed sentiment.

The engagement benchmark where Business Services apps fell slightly below average was annual retention, where they averaged 52% for Fans (average is 54%) and 46% for Risks (average is 50%). Factors affecting these low retention rates could include ease of use, ability to easily switch to competitors, or budget cuts to finance consumer usage. In 2021, Business Services apps should revisit the percentage of consumers they prompt for feedback and where they ask for it along consumer journeys in order to improve short and long-term retention.
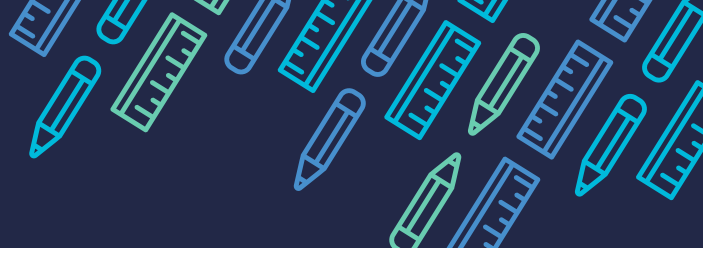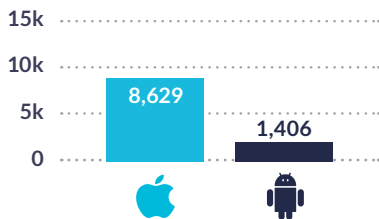
Education

Education

> " *As biological, cognitive beings, we haven't changed very much. But technology is changing every facet of our life, and I think that is also now happening in education, where teachers are working alongside technology."*

ZACHARY PARDOS
Professor, UC Berkeley's
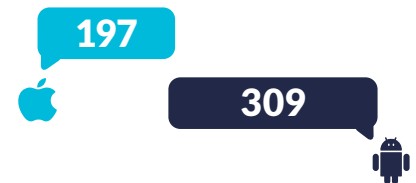Graduate School of Education
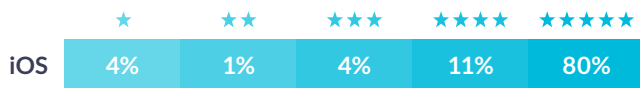
Ratings and Reviews

Average Number of Ratings

15k
10k
5k
0

8,629

1,406

Average Star Rating

4.67

3.84

Average Number of Reviews

197

309

App Store Ratings Distribution

iOS	★	★★	★★★	★★★★	★★★★★
	4%	1%	4%	11%	80%

Android	★	★★	★★★	★★★★	★★★★★
	21%	3%	5%	11%	60%

Retention

Average 90-day Retention

27%

Average Annual Retention

4%

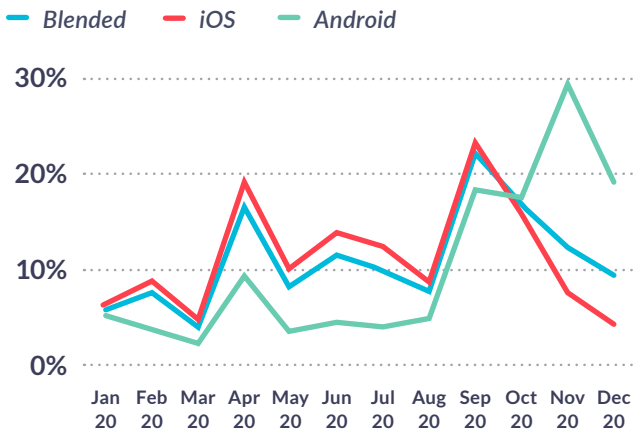**If someone saw an interaction in the first 90 days**, their retention rate was

67%

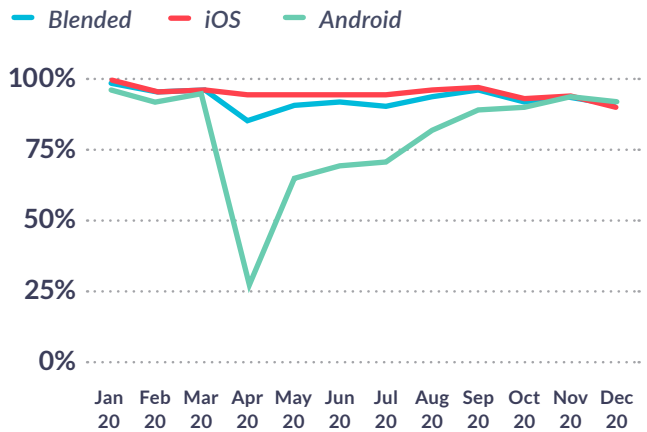**If the interaction was a Love Dialog, their retention rate was**
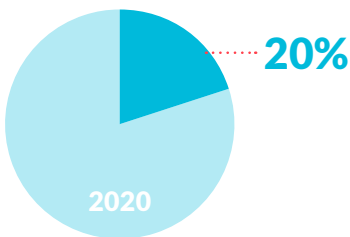
68%

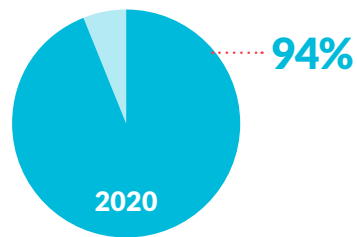# Interaction and Response Rates

COVID's Impact on Monthly Interactions

— Blended — iOS — Android

COVID's Impact on Monthly Response Rates

— Blended — iOS — Android

2020 Average Interaction Rate

20%

2020

2020 Average Response Rate

94%

2020

Popular Phrases

Please fix	**Click on**	**Take note**
Log in	**Apple pencil**	**Dark mode**
Customer service	**New update**	**Drop down**
		Split screen

Popular Phrases with Sentiment Distribution

■ *Negative* ■ *Neutral* ■ *Positive*

Phrases

please fix
click on
take note
log in
apple pencil
dark mode
split screen
customer service
new update
drop down
thank you
scroll through
doesn't work
nothing happen
web browser
muy buena
user friendly
landscape mode
samsung galaxy
works well
get rid
old version
extremely frustrating
keep crashing
cannot access
no response
error message
android device
high school
font size

0   10   20   30

Mobile Consumer Sentiment

Love Dialog Conversion Rate
Consumers who responded "Yes" or "No" to Love Dialog prompts

97% 🍎

94% Blended
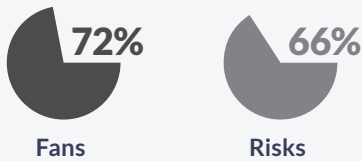
84% 🤖

Love Percent
Total consumers who respond "Yes" to Love Dialog prompts

45% 🍎

48% Blended

58% 🤖

Retention Rates for Fans and Risks
Fans are "Yes" responses, Risks are "No" responses

90-day Retention

72% Fans

66% Risks

Annual Retention

11% Fans

13% Risks
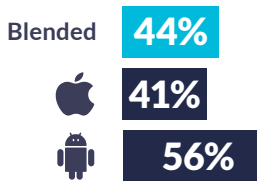
Expressed Consumer Emotion by Segment in 2020

New Fans
Customers who have expressed positive emotion for the first time

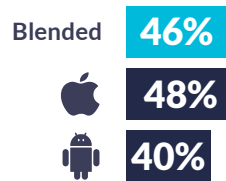| Blended | 44% |
| 🍎 | 41% |
| 🤖 | 56% |

Repeat Fans
Customers who have expressed positive emotion at least twice in a row

Blended	3%
🍎	3%
🤖	2%

New Risks
Customers who have expressed negative emotion for the first time

Blended	46%
🍎	48%
🤖	40%

Repeat Risks
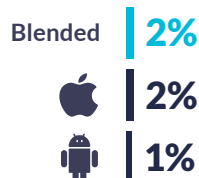*Customers who have expressed negative emotion at least twice in a row*

Blended	4%
🍎	5%
🤖	1%

Reclaimed Fans
Customers whose expressed emotion has shifted from negative to positive, or from Risk to Fan

Blended	1%
🍎	2%
🤖	1%

Lost Fans
Customers whose expressed emotion has shifted from positive to negative, or from Fan to Risk

Blended	2%
🍎	2%
🤖	1%

Shifted Emotions

Blended	-10%
🍎	-10%
🤖	-17%

Apptentive | 2021 Mobile App Engagement Benchmark Report

Surveys and Messages

Average Survey Response Rate

9%

16% Blended

40%

Average Response Rate to Note-linked Surveys

82% Blended

Percentage People Prompted for Surveys

51%

50% Blended

45%

Summary of Education Apps in 2020

Education was one of the hardest hit industries in 2020. Quick transitions to remote learning, usage and integration hurdles, lack of funding for new tech, and massive fluctuations in MAU all played a role in delivering a challenging year for educators and education technology across the country.

Let's start with the bad. Education apps saw some of the worst retention rates in 2020, especially in annual retention (4% compared to the macro average of 35%). Education apps also experienced some of the most extreme MAU fluctuations starting in March and continuing throughout the year, which undoubtedly impacted their tech's service reliability. In response, consumers took to the app stores to express frustration, and the category's average star ratings are below average on both iOS and Android.

But it wasn't all doom and gloom. Education apps who were able to proactively ask consumers for in-app feedback received a 94% response rate to their in-app interactions—higher than the macro average (92%). Mobile teams also expanded their segments of consumers to survey (50%) which resulted in incredibly high response rates to Note-linked surveys (82%). The lesson here is consumers were eager to share feedback when they were asked for it, especially when it meant not leaving the app to do so. For brands who did this well, the feedback they gathered was able to help them fix bugs, adjust product roadmaps, and generally improve customer happiness.