Modern Mobile Consumer 2022: App Discovery Report

New insights on the consumer path to app discovery and beyond
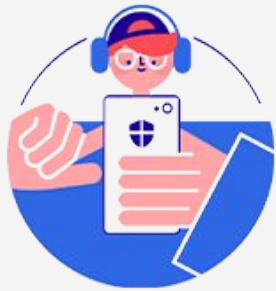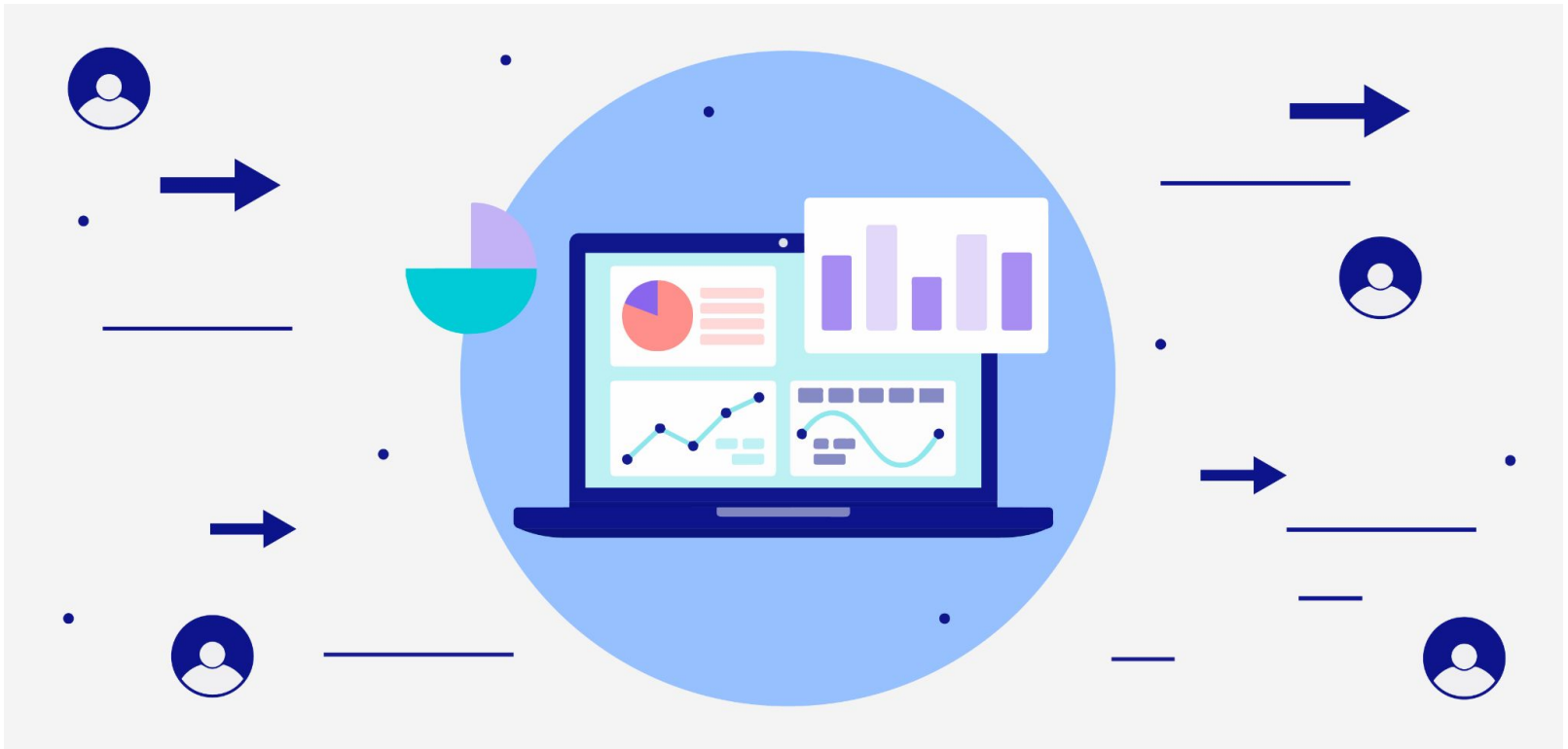
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Table of contents

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Executive Summary

To help UA advertisers and monetization managers find the most relevant information, we've split our Modern Mobile Consumer report into two versions: App Discovery (seen here) and Monetization (available here).

Here's what we discovered: Consumers follow a myriad of paths to app discovery, so your approach to UA should be equally diverse. Additionally, there's no longer a need to segment audiences into "gamers" and "non-gamers," as consumer attitudes towards app discovery and monetization are largely similar no matter how they categorize themselves, or what apps they're using.

To test this theory, we surveyed audiences from gaming and non-gaming apps on the MobileVoice® network, as well as a control group outside of these apps to eliminate bias and confirm accuracy. By thoroughly analyzing the mobile habits of a broader spectrum of consumers, we were able to identify common threads in how mobile users find and interact with their favorite apps.

It's time to meet the Modern Mobile Consumer.
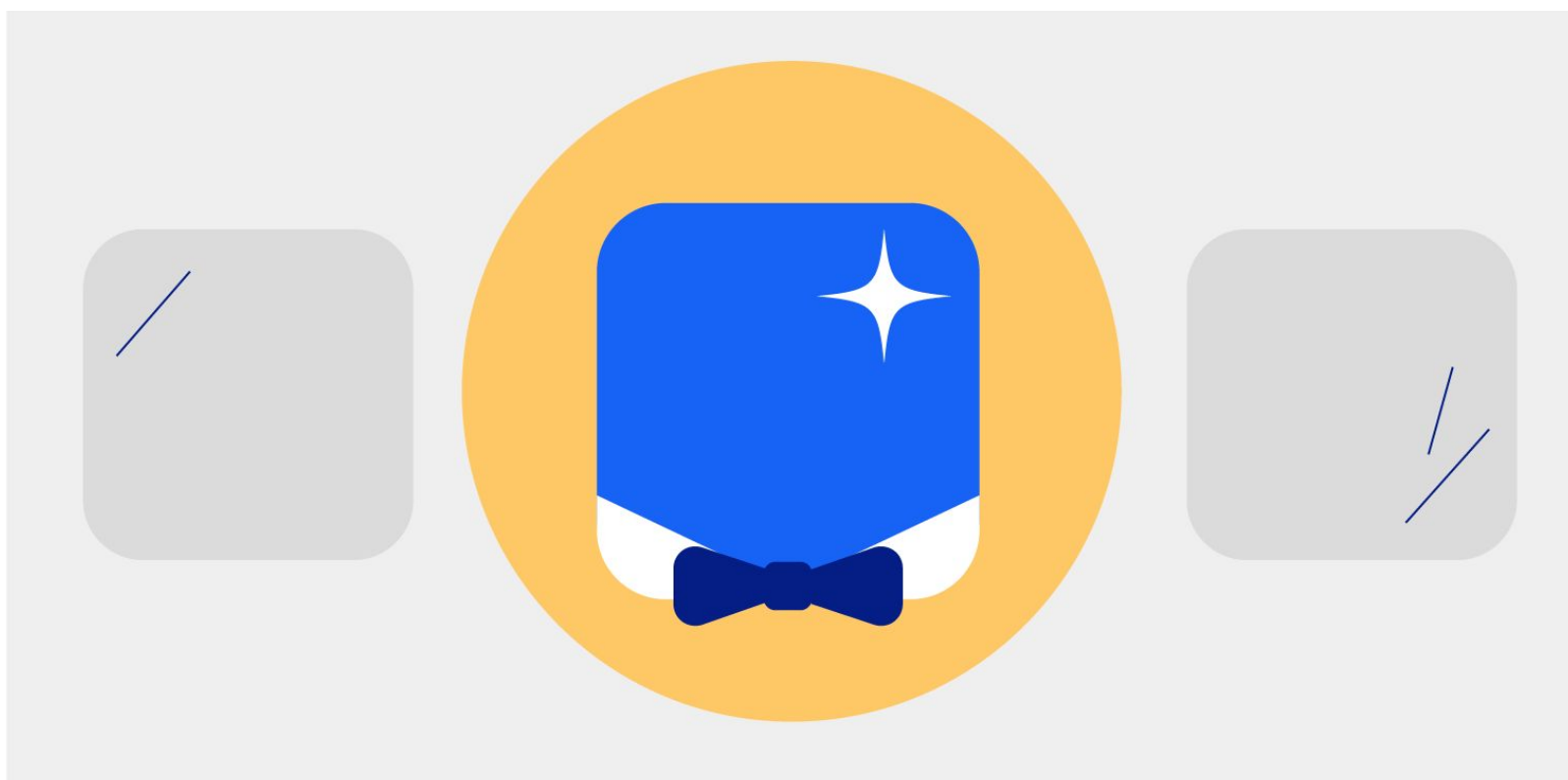
Key Findings

- In-app advertising is the best mobile marketing channel for reaching any consumer audience. **An impressive 70% of consumers surveyed in mobile games and 78% of a blended control group downloaded apps after viewing mobile ads for them.** Further, consumers are installing more apps from mobile ads than five years ago.

- The majority of mobile users have **20 or more apps on their devices**, but between 39% and 50% **only use 5 to 10 daily**, varying slightly by group.

- Consumers find video ads, app store ads (like Apple Search Ads), and interactive ads to be the most helpful for discovering new apps.

- Mobile gaming is a universal hobby enjoyed by most mobile users. **60% of the non-gaming app audience plays mobile games**, tying with social media for overall top app usage.

- Reward your consumers. While all audiences notice ads that are relevant to their interests, **33% of those surveyed in apps outside of games pay more attention to ads with in-app rewards.** This is only slightly less than the gaming group (36%), dispelling the myth that rewarded ads are only suitable for mobile games.

- **32% of gaming audiences prefer app store ads, 21% of non-gaming audiences favor both video ads and promotions.**
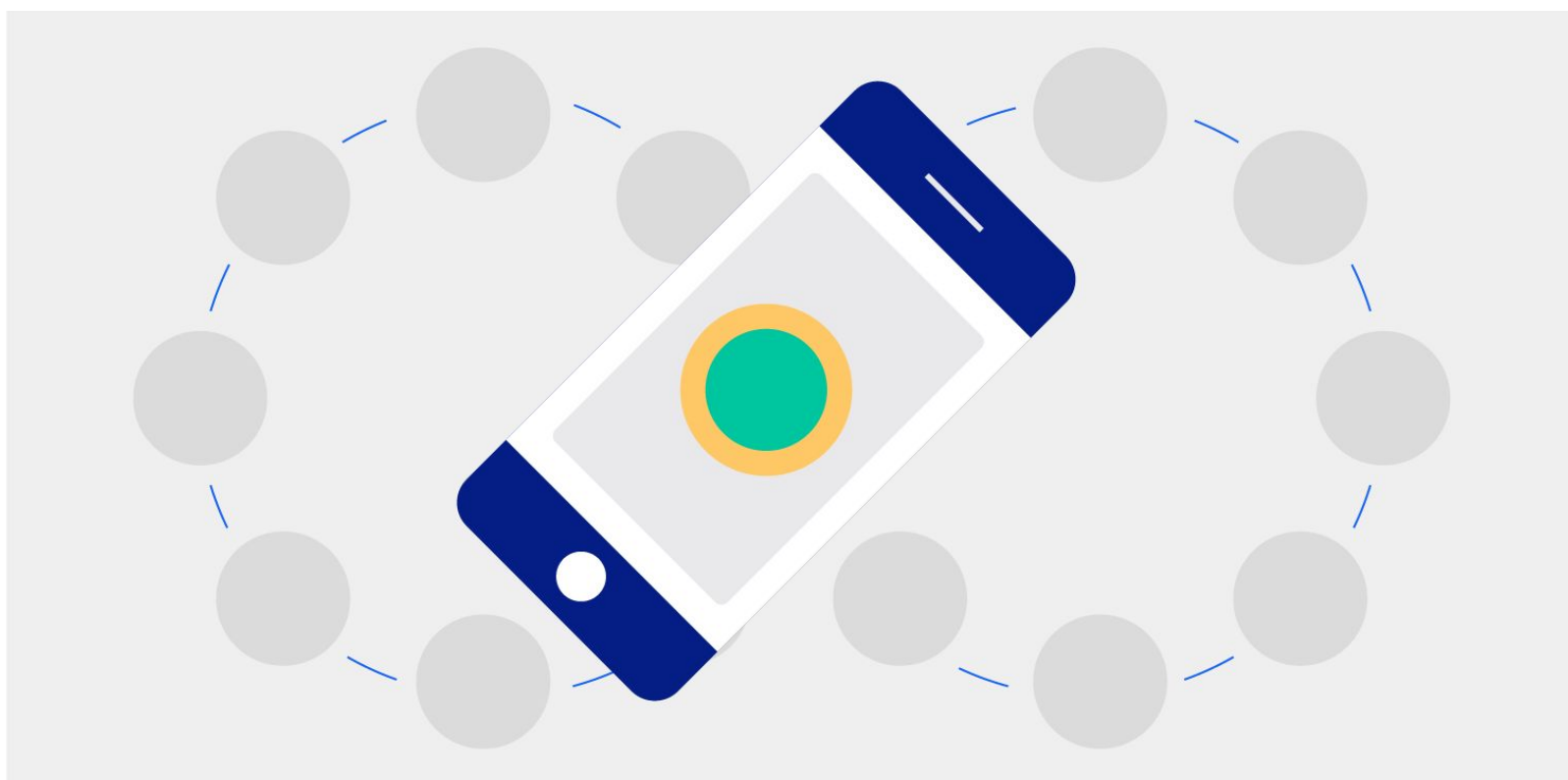
Methodology

Over the last seven years, we've surveyed tens of thousands of mobile gamers to understand their daily habits, brand preferences, and much more. These insights laid the foundation for our Modern Mobile Gamer® reports, driving the creation of rich and engaging in-app advertising experiences.

Since the launch of MobileVoice® by Tapjoy in 2021, we've been able to use our market research solution to dig even deeper, gathering authentic insights with custom surveys that reward engagement and incentivize consumers to give accurate results. To that end, we've expanded the scope of the Modern Mobile Gamer®, releasing four major reports in 2021 and a game-dev-focused report in early 2022.

That's why we're zooming out beyond the gaming ecosystem to look at consumers across audiences with our newest reports. Using MobileVoice®, we surveyed 18,894 consumers from gaming apps and 11,563 consumers from non-gaming apps across the ironSource network. Additionally, we used a third-party polling source to survey 500 consumers outside the MobileVoice® network to confirm accuracy and eliminate bias.

30,457 Respondents	**MobileVoice®** **Market Research**	**Control Group**
The study's respondents found and completed rewarded survey offers in a variety of gaming and non-gaming apps on the Tapjoy Offerwall.	Survey data was collected and analyzed using MobileVoice® custom-built surveys with scalable insights.	Surveys were also run via third-party service Pollfish to eliminate bias and confirm accuracy of results. The control group accounts for an additional 500 respondents.
Opt-in Participation	**Virtual Rewards**	**Survey Period**
Respondents reviewed instructional information and opted in to participate in exchange for in-app rewards.	In exchange for participation, respondents received virtual rewards or premium content native to each app's economy.	Responses were collected and analyzed from multiple surveys launched in April-May 2022.
Age Verification	**Extensive Reach**	
All respondents verified that they were 18 years of age or older.	The survey campaign was distributed across a variety of popular mobile apps with global reach.	

Part I: App Discovery

For both developers and advertisers, the consumer journey starts with app discovery, and a big part of app discovery is advertising.

As it turns out, mobile users across all audiences rely heavily on different forms of advertising to find new apps. **In-app advertising is especially effective**, but online and mobile web ads can also make an impact. Don't discount app store recommendations or promotions, either; across the board, respondents indicated that they **download apps based on App Store or Google Play promotions** with some regularity. Beyond that, word-of-mouth recommendations carry a lot of weight — far more than celebrity or influencer endorsements.

Top ways consumers find new apps

	Mobile games audience	Non-gaming apps audience	Control group
#1	48% in-app ads	40% in-app ads	55% app store recommendations
#2	46% friends' recommendations	37% friends' recommendations	54% friends' recommendations
#3	37% app store recommendations	31% mobile/ web ads	45% in-app ads

When consumers download apps

	Mobile games audience	Non-gaming apps audience	Control group
#1	35% free time, vacation, holidays	31% free time, vacation, holidays	48% when a specific need arises
#2	29% when a specific need arises	28% when a specific need arises	27% free time, vacation, holidays
#3	23% setting up new device	16% setting up new device	19% setting up new device

Top motivations for installing apps

	Mobile games audience	Non-gaming apps audience	Control group
#1	55% desire to try new game	47% desire to try new game	56% desire to try new game
#2	42% hearing about it from friends	35% hearing about it from friends	50% utility or productivity needs
#3	25% utility or productivity needs/desire to use app rather than mobile site	26% utility or productivity needs	47% desire to use app rather than mobile site

Part II: App Usage

Helping consumers find your app is important, but it's only the beginning of the journey. Our data shows that the majority of mobile users have more than **20 apps on their devices**, but generally **only use 5 to 10 on a daily basis**. To get into that rotation, advertisers need to fulfill consumer needs while competing with thousands of apps trying to do the same thing.

One type of app that never goes out of style? Not surprisingly, it's mobile games. Even in the control group and non-gaming-app audience, mobile games were among the top three apps used daily by respondents. Given that more than half of respondents in each group listed entertainment and relaxation as a reason for using apps repeatedly, it's clear that all mobile consumers are often on the lookout for something fun to do.

Apps consumers use daily

	Mobile games audience	Non-gaming apps audience	Control group
#1	72% social media	60% social media (tie)	72% social media
#2	69% mobile games	60% mobile games (tie)	56% mobile games
#3	59% communications	51% communications	49% banking/finance
#4	36% streaming entertainment (e.g. Netflix, Hulu, Spotify)	36% streaming entertainment (e.g. Netflix, Hulu, Spotify)	47% streaming entertainment (e.g. Netflix, Hulu, Spotify)
#5	34% live streaming (e.g. YouTube, Twitch)	32% live streaming (e.g. YouTube, Twitch)	44% live streaming (e.g. YouTube, Twitch)

Reasons for opening most frequently used apps

	Mobile games audience	Non-gaming apps audience	Control group
#1	68% entertainment/relaxation	58% entertainment/relaxation	74% keep in touch with friends/family
#2	53% keep in touch with friends/family	43% keep in touch with friends/family	56% entertainment/relaxation
#3	23% for work	21% for work	40% keep track of financial/fitness/life goals

Part III: Ad Strategy

From our data spanning years of reports, it's clear that in-app advertising is one of the most powerful tools advertisers and developers have at their disposal. A whopping **70% of the mobile game app audience and 78% of the control group have downloaded apps after seeing ads for them**, making them an effective way to reach just about any mobile demographic. The majority of respondents also said they download more apps from mobile ads now than they did five years ago, with **parents being particularly responsive** to the advertising ecosystem.

The question is: With so many options available, how can one best capture the consumer's attention? Relevance, rewards, humor, and a straightforward approach go a long way with all consumer groups.

Ad types they find most helpful

	Mobile games audience	Non-gaming apps audience	Control group
#1	32% app store promotions	21% video ads (tie)	26% video ads
#2	21% video ads	21% app store promotions (tie)	24% rewarded ads (tie)
#3	14% interactive/playable	15% interactive/playable	24% app store promotions (tie)
#4	11% rewarded	12% rewarded	10% interactive/ playable (tie)
#5	10% image/banner	10% image/banner	10% image/banner (tie)

What makes them pay attention to ads

	Mobile games audience	**Non-gaming apps audience**	**Control group**
#1	55% relevant to their interests	43% relevant to their interests	59% relevant to their interests
#2	37% humorous	33% they get a reward	45% they get a reward
#3	36% they get a reward	30% humorous (tie)	31% straightforward and to the point
#4	32% straightforward and to the point (tie)	30% straightforward and to the point (tie)	28% humorous
#5	32% interactive/ playable (tie)	30% interactive/playable (tie)	26% interactive/playable

Part IV: The Path Forward

How can advertisers lead consumers on the journey from marketing to discovery to download to monetization? By following a few key steps supported by our data.

1 Be Relevant

- Relevance to their interests is the #1 reason consumers pay attention to ads
- Use market research to find out more about your audience

2 Be in the Right Place at the Right Time

- Meet them at the start of the journey by engaging right out of the box
- Ads should be unintrusive and appear at natural break points, especially in games
- App store ads in Apple's App Store and Google Play go a long way
- Weigh ad placement in consumers' most-used apps for best ROAS

3 Be Creative

- Humor is an effective weapon
- Emerging ad types, like playables, offer new creative opportunities
- Static images and banners rarely make an impression

4 Incentivize Consumers With Rewards

- Rewarded offers attract new customers while maximizing ad spend
- Multi-Reward CPE boosts retention by continuously engaging users

5 Be Memorable

- Word-of-mouth recommendations go a long way among mobile consumers
- Branded content should be shareable, informative, and easy to absorb

Conclusion

Mobile games are an ideal medium for advertisers, as they're full of highly engaged, high-LTV users. However, apps outside of the gaming category also present advertisers with plenty of opportunities in the evolving mobile ecosystem. That means it's far easier to create multiple paths to app discovery than ever before, especially once you consider that:

- 70% of the mobile game app audience and 78% of the control group have downloaded apps after seeing ads for them

- 21% of that same audience is receptive to video ads

- Both groups (33%-36%) are strongly motivated by in-app rewards

Want to know more about the Modern Mobile Consumer? Check out the [2022 Monetization Report.](#)

Get comprehensive insights & fuel growth with MobileVoice®

Learn More

About MobileVoice®

The mobile ecosystem has evolved, but many market research platforms are stuck in the past. By reaching consumers where they spend their time — in mobile apps — and rewarding engagement, MobileVoice® delivers the authentic insights necessary for success. With a global reach, flexible pricing, cohesive branding, and seamless API integration, MobileVoice® is an ideal way to learn more about consumer behavior, habits, and demographic info.

If you're ready to deploy custom-built surveys with scalable insights, get in touch. Our mobile strategists are standing by.

About ironSource

ironSource is a leading business platform for the App Economy. App developers use ironSource's platform to turn their apps into successful, scalable businesses, leveraging a comprehensive set of software solutions which help them grow and engage users, monetize content, and analyze and optimize business performance to drive more overall growth. The ironSource platform also empowers telecom operators to create a richer device experience, incorporating relevant app and service recommendations to engage users throughout the lifecycle of the device. By providing a comprehensive business platform for the core constituents of the App Economy, ironSource allows customers to focus on what they do best, creating great apps and user experiences, while enabling their business expansion in the App Economy. For more information please visit www.is.com.

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