

MEASURE

APP LIFE REPORT

20

23

2023 VOL. 2

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Consumer Behaviors: A Holistic View

Brands, advertisers and marketers are soon to venture into a new reality without cookies. While cookies began as innocent bits of information in a browser to provide convenient tracking of web behaviors, over time they became the staple ingredient for web measurement, thus critical to advertisers and marketers. With major players announcing the crumble of the cookie, and increased legislation around data and privacy, everyone is scrambling to understand their audiences in a post-cookie world.

This new reality will shift the focus to first-party, zero-party, and permissioned data to understand consumer behavior. Context, data quality and data hygiene will become of paramount importance. Further, instead of collecting slivers of information about each person, it will become essential to build a complete picture of individuals. Funnels are dead, engagement is fragmented and media crosses channels.

This App Life Report reflects consumer behaviors in the United States during July 2023. The data was collected using Measure's Retro technology and represents data from over 5,000 individuals, obtained in a permissioned and holistic manner. This report also includes a sampling of data from a wider service available on the Measure Platform.

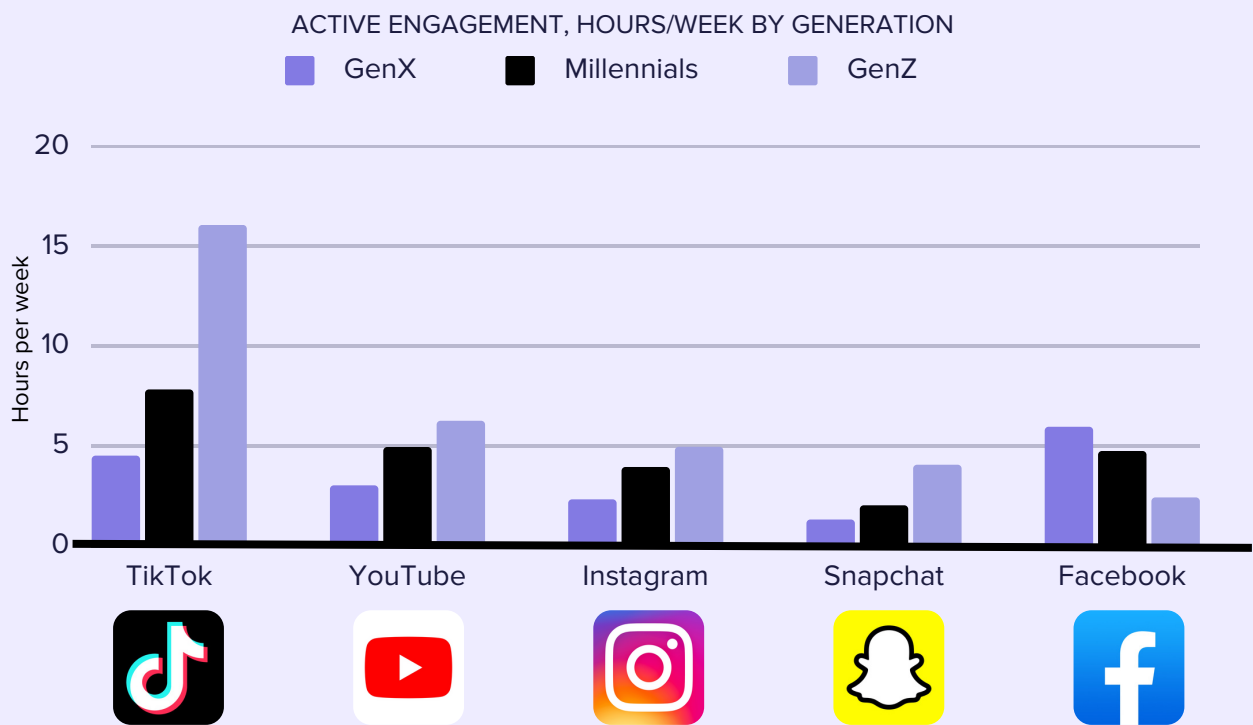
Measure uses proprietary technology based on privacy, transparency, and a fair value proposition. Individuals contribute mobile and account-level data with confidence, thus providing the only user-focused data solution. As a result, Measure delivers the most granular behavior data on individuals' digital and mobile lives in a time where the ability to collect mobile data is becoming increasingly challenging due to legislation, privacy concerns, and ecosystem restrictions.

WHAT ARE INDIVIDUALS DOING?

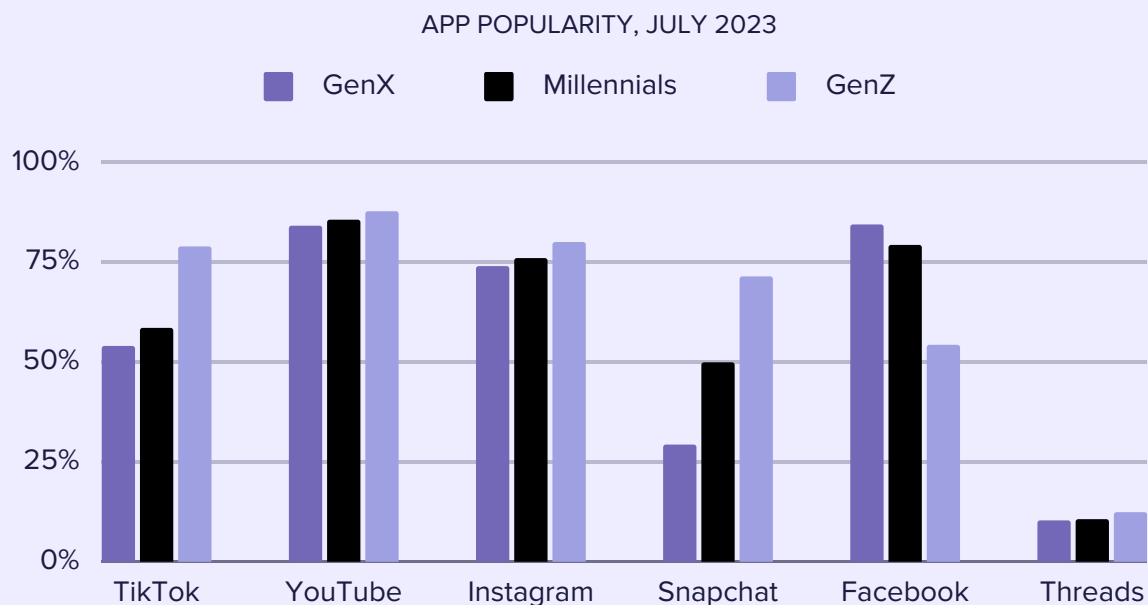


APP ENGAGEMENT

Generational differences can be seen across app engagement with TikTok being the most used on a weekly hourly basis for Gen Z at 16 hours per week, while Facebook engagement is highest with Gen X at 5.9 hours per week. Millennials, or Gen Y, remain planted in the middle.

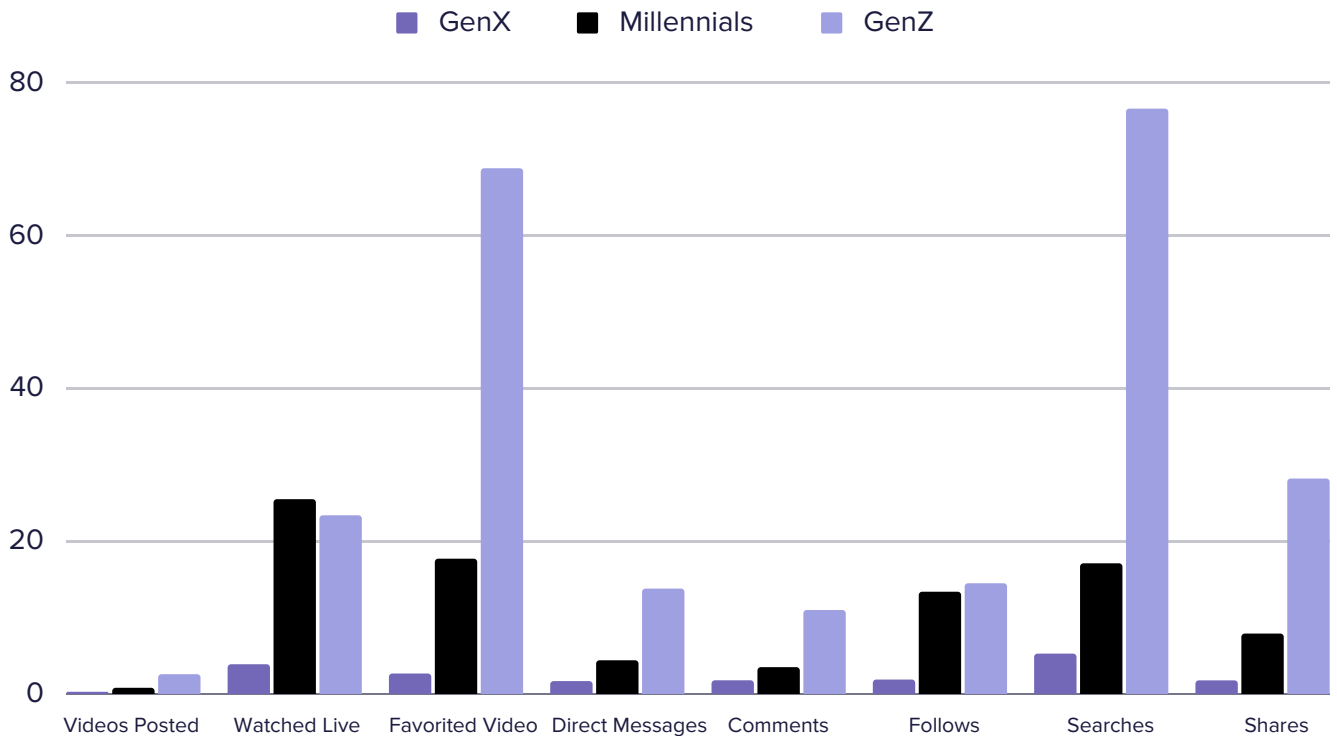


YouTube is one of the most broadly used apps with 87% of Gen Z actively using it during the month of July 2023. Threads, while an immensely popular download, fails to achieve regular usage compared to the other apps listed.



TIKTOK BEHAVIORS

JULY 2023 | USA



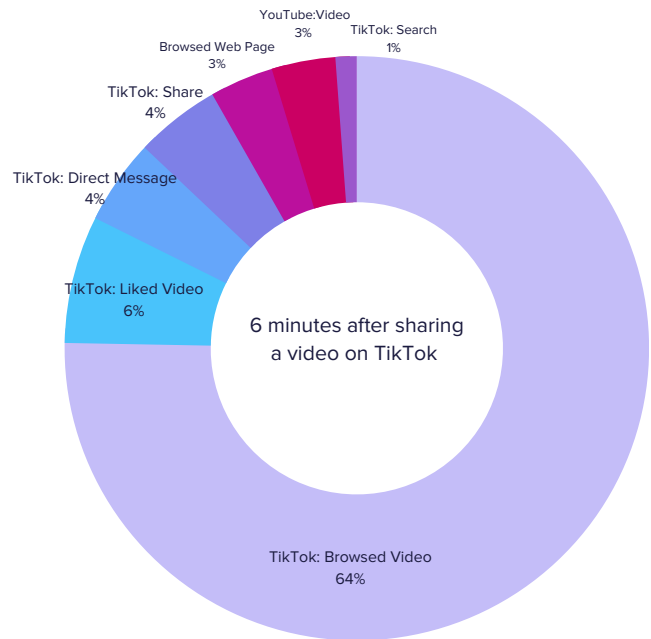
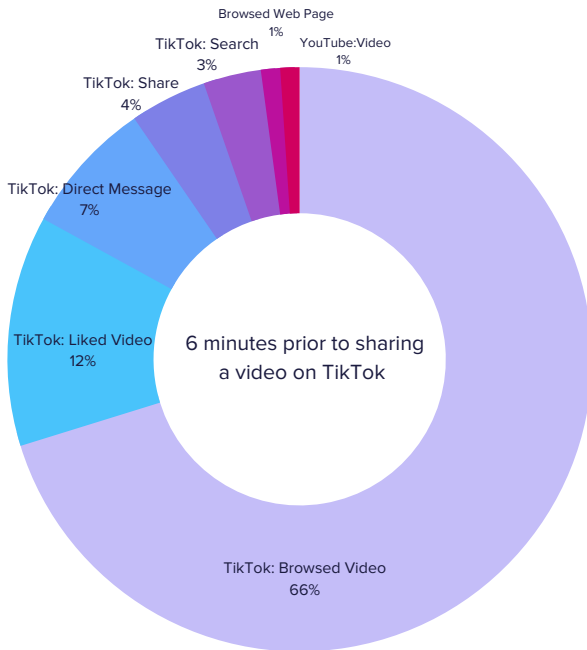
Not only are Gen Z audiences spending more time on TikTok, they are also participating at a high rate across almost all activities. Gen Z is more prolific at favoriting videos, commenting, sending direct messages, searching and sharing. However, the number of live watches is slightly higher for Millennials than Gen Z.

“In July, Gen Z browsed an average of 5,400 videos on TikTok”

More time on TikTok led to an average of over 5,400 videos browsed by Gen Z compared to 1,600 for Millennials.

CONSUMER JOURNEYS

ACTIVITIES COMPLETED SIX MINUTES PRE-POST FOR
INDIVIDUALS WHO HAVE SHARED ON TIKTOK

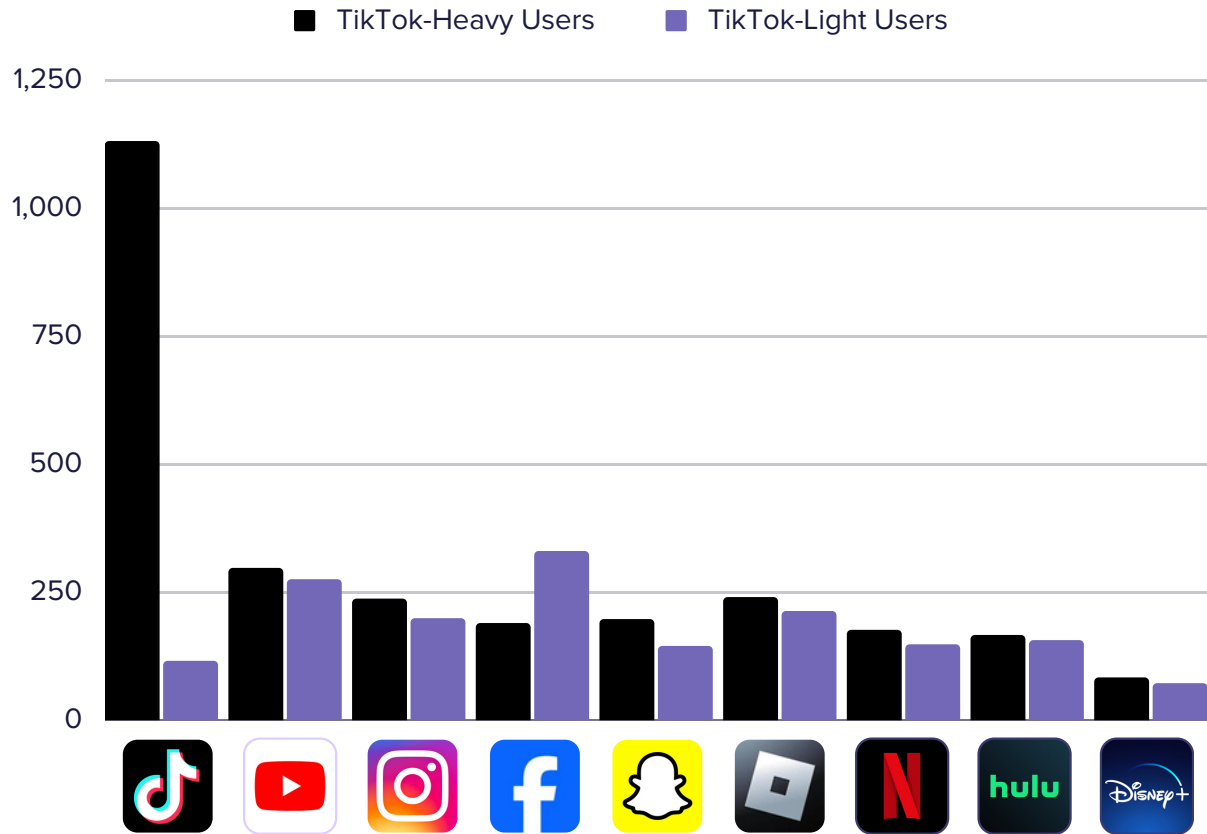


Today's consumer does not behave in a linear manner. Media and device fragmentation leads to a myriad of individual level journeys across services. Marketers strive to understand slices of this experience and understanding what happens in sequence, or before and after a behavioral event, is the first step to deeper understanding of consumers.

We examined behaviors across TikTok, Google and YouTube within a six minute period of pre- and post- sharing on TikTok and found early indicators of cross-platform behaviors. While the most common behavior before sharing a video on TikTok was browsing a video on TikTok, about 2% had watched a YouTube video or browsed a web page in the six minutes prior. Within the six minutes after sharing a video on TikTok, nearly 6% of the actions included either browsing a web page on Chrome or watching a YouTube video.

SCREEN DOMINANCE

COMPARISON OF HEAVY AND LIGHT USERS OF TIKTOK
MINUTES PER WEEK USING MOBILE APP | 2023 | USA

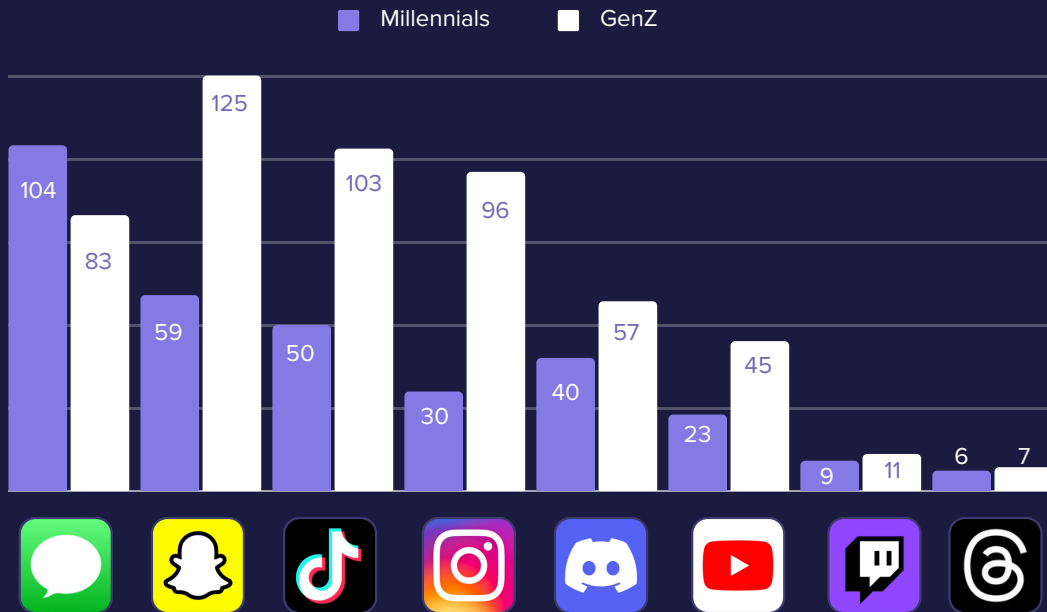


With the growing access to media and channels, consumers may be becoming saturated as services compete for any available time they have outside of work, family and other daily activities. Heavy TikTok users (18 hours per week) are getting perilously close to the "available time" ceiling for consuming media. Our 2023 data from nearly 10,000 individuals indicates that these heavy TikTok users are also spending slightly more time than light TikTok users (two hours per week) on a variety of other apps, with the exception of Facebook. These heavy consumers are likely employing multiple screens, often concurrently, while using various apps and services.

This drastic rise of TikTok and the amount of time these heavy users are spending on leading iOS apps overall challenges traditional assumptions around media consumption. Their behaviors are worthy of further investigation to better understand how they are engaging with each service, as discovery and consideration metrics are developed across services in the consumer journey.

NUMBER OF TIMES PER WEEK AN APP IS THE FIRST USED WHEN A DEVICE IS PICKED UP

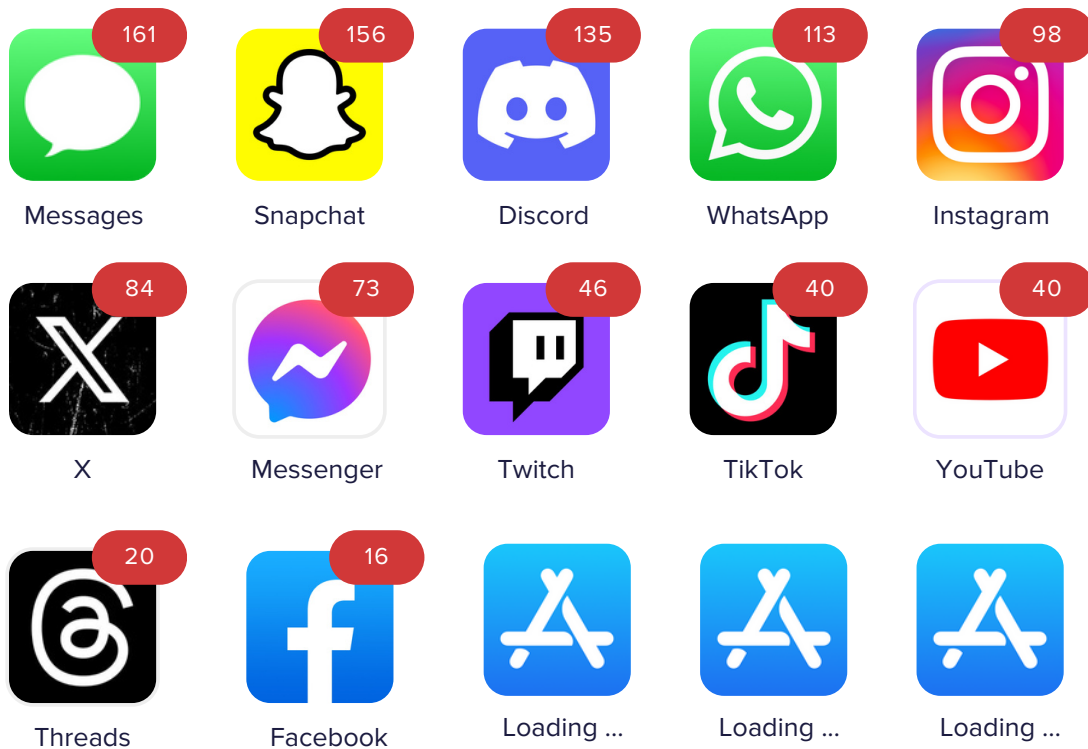
July 2023, USA



PRIORITY ENGAGEMENT

The first thing people do when they pick up their smartphones can reveal a lot about their intentions, and these actions vary according to age and other demographics. Known as ‘priority engagement’, this concept defines the primary purpose of reaching for one's device. For instance, Gen Z individuals are more likely to open Snapchat as their first app, while Millennials (Gen Y) tend to use more prevalent apps like Messages when they first pick up their iPhones. This trend indicates that the Snapchat feature set for communication may resonate highly with this younger audience.

AVERAGE WEEKLY NOTIFICATIONS FOR TOP APPS (GEN Z)



NOTIFICATIONS ARE A KEY INDICATOR OF ENGAGEMENT

Communication apps lead the way in getting through with notifications.

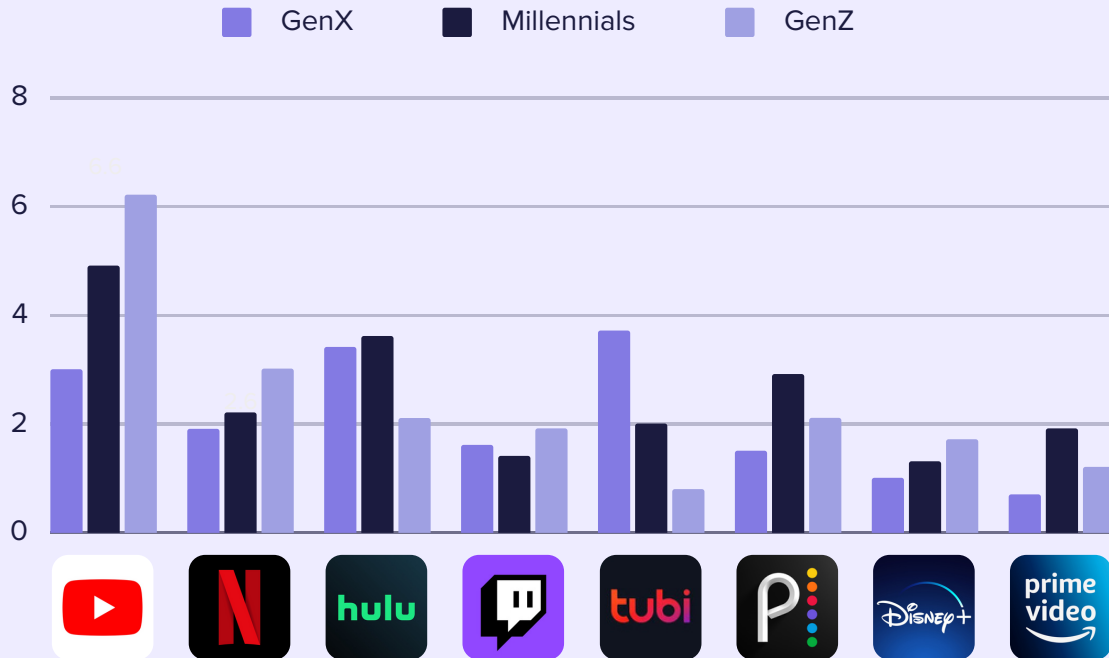
Communication apps still generate the highest number of notifications, including for Gen Z audiences. As users have more control over the productivity, focus features and settings on iOS devices, the number of notifications they receive can indicate their preferences. Therefore, notifications remain a strong indicator of how users prioritize their app usage.

WHAT ARE INDIVIDUALS CONSUMING?



TOP STREAMING APPS

WEEKLY HOURS BY GENERATION, JULY 2023, USA



Among Gen Z iPhone users, YouTube remains the most engaging streaming/video app, with an average usage time of 6.2 hours per week. Netflix, though primarily used on bigger screens, still accounts for around 3 hours per week on iPhones by Gen Z. Tubi and Hulu are much more prevalent with Gen X audiences, with Gen X is spending nearly 5x more time on Tubi than their Gen Z counterparts. This trend may indicate the appeal of emerging ‘free’ and ‘ad supported’ models for TV and movie content. Understanding audiences and their differences in media consumption provides marketers with new opportunities.

HOURS SPENT WITH GAME APPS

Men | Gen Z | July 2023

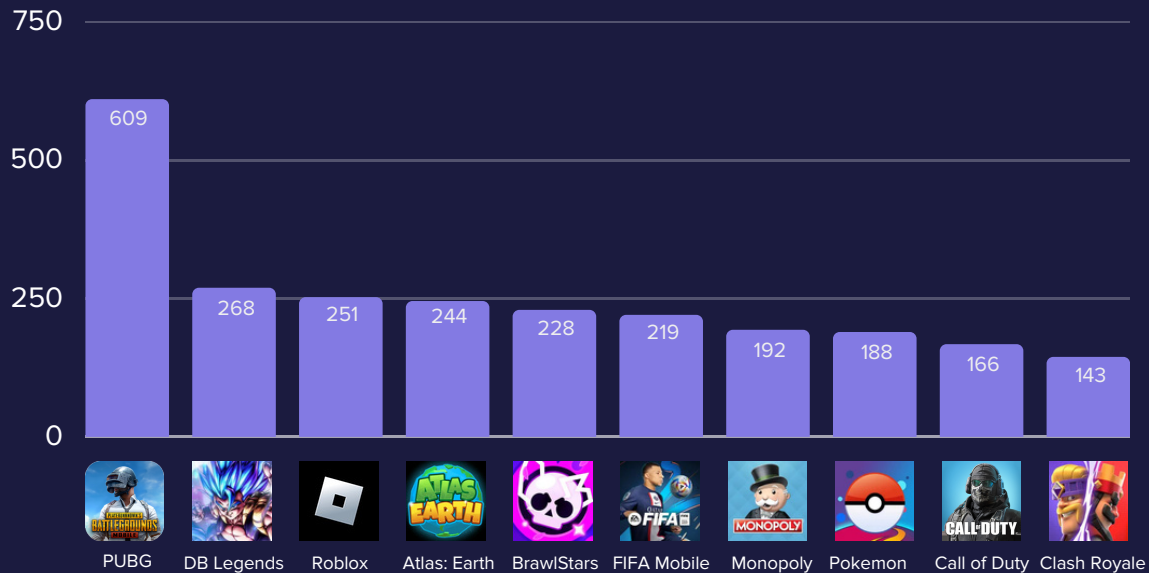
Minutes per week



iPhone



USA



Gen Z men have a distinct pattern surrounding the iOS mobile games on which they spend time. PUBG Mobile holds the highest engagement during July 2023 with over 609 average minutes, with Dragon Ball Legends in second, coming in at less than half the PUBG average at 268 weekly minutes.

Overall, Gen Z women are spending roughly the same amount of time playing games as men at just over two hours per week, but the games they are playing the most differs largely. For example, they are spending more than twice as much time playing Call of Duty than men and few of the top-played games have overlap between genders.

Women | GenZ | July 2023

Minutes per week

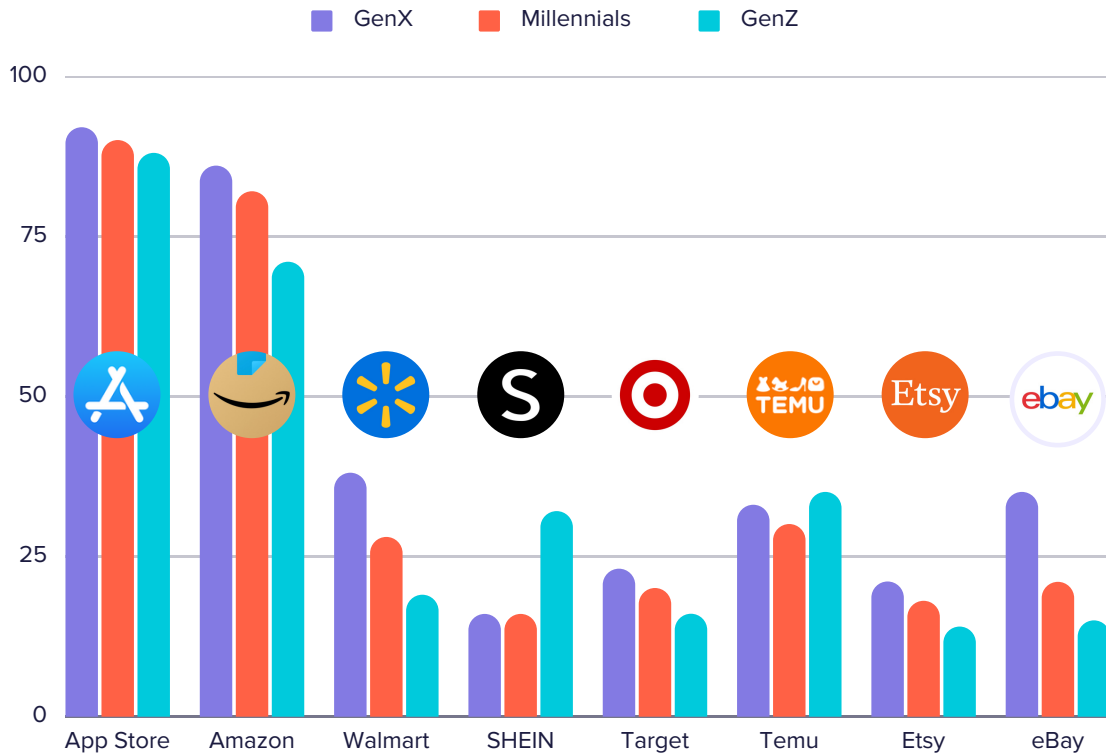


WHAT ARE INDIVIDUALS BUYING?



MOST POPULAR SHOPPING APPS

GEN Z INDIVIDUALS WHO HAVE USED APP IN JULY 2023 | USA

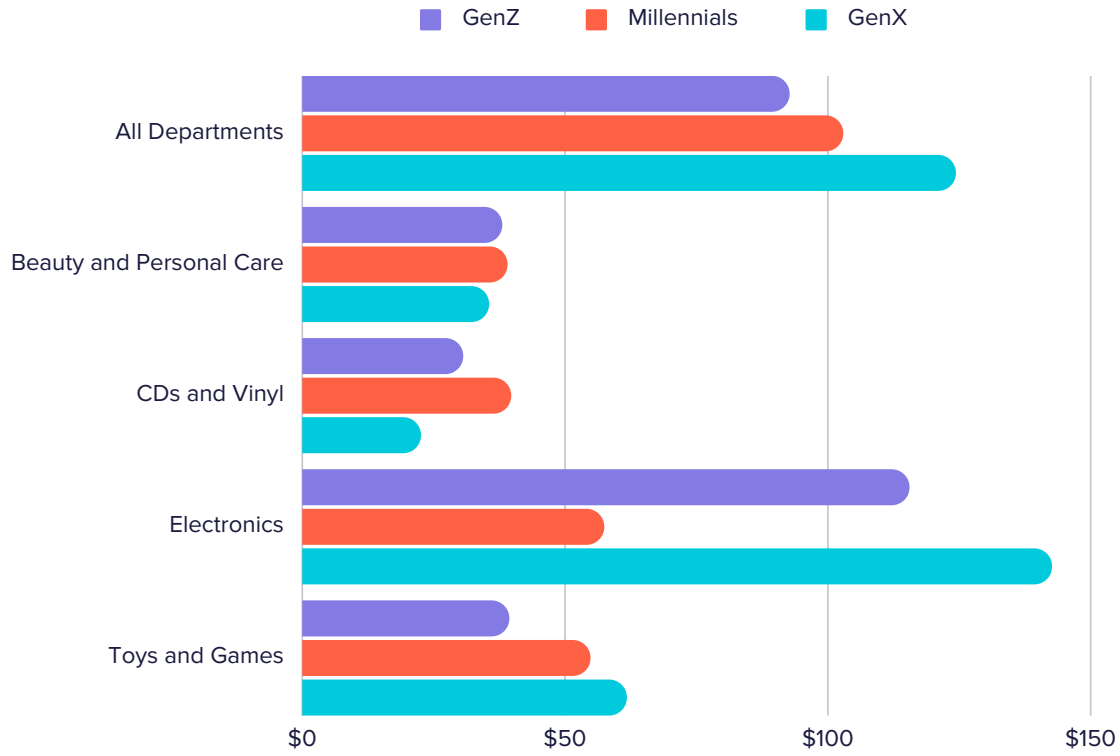


Shopping apps are popular for making purchases, browsing and for competitive shopping. The most used iPhone shopping app for Gen Z is the App Store with 88% using it in July 2023. Of the large retail app players, Amazon dominates with 71% of Gen Z, followed by Temu (35%), SHEIN (32%), then Walmart (19%). While Walmart is ranked as the fifth most used retail app by Gen Z after Temu and SHEIN, it is the third most used by Gen X, right behind Amazon.

Shopping and retail behaviors continue to be key differentiators in app usage across generations.

AVERAGE SPEND

AVERAGE SPEND ON AMAZON PURCHASES BY CATEGORY
OF THOSE WHO MADE PURCHASE IN JULY 2023 | USA



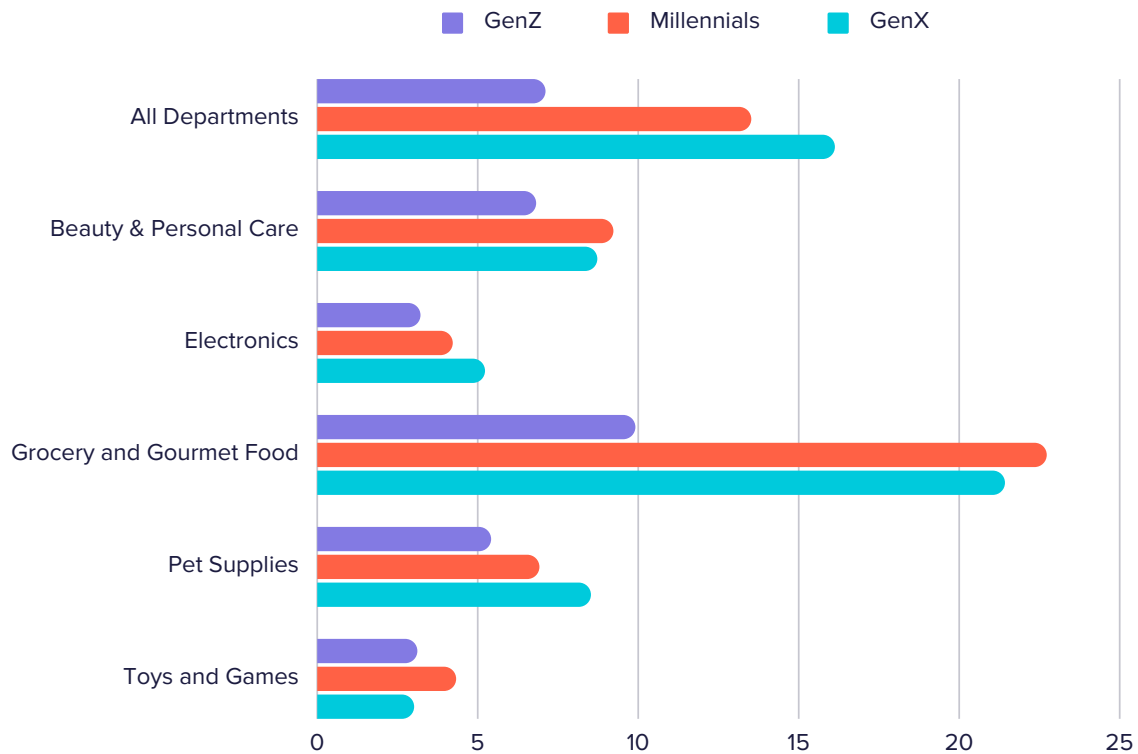
While Gen X may have more disposable income, Gen Z individuals who made an Amazon purchase in July came close to matching their Gen X counterparts on average spend in the electronics category, and even spent more than Millennials. Both Gen Z and Millennials spent more on CDs and Vinyl than Gen X.

“On Amazon, Gen Z spent 2x more on Electronics than Millennials”

Interestingly, we see the relative same item spend across generations on some Amazon categories such as Beauty and Personal Care, likely reflecting a potential smaller range of item costs on some everyday items.

NUMBER OF PURCHASES

ITEMS PURCHASED ON AMAZON
JANUARY TO JULY 2023 | USA

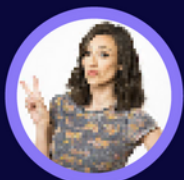


Millennials made on average about 60 purchases on Amazon over the period of January to July inclusive, compared with only 25 by Gen Z individuals, attributed partly by the availability of disposal income.

“Millennials purchased 2.4x more items than Gen Z on Amazon”

By understanding an audience’s top spend areas, marketers can start to identify key opportunities for reaching their ideal audiences.

GEN Z INDIVIDUALS WHO SEARCH FOR THESE INFLUENCERS ON YOUTUBE...



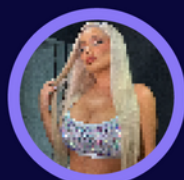
Colleen Vlogs

@ColleenVlogs
3.26M subscribers



Kevin Leonardo

@thecoolestke
322K subscribers



blndsundoll4mj

@blndsundoll4mj
5.09M subscribers



Taylor Swift

@TaylorSwift
54.2M subscribers



...ON AVERAGE, SPEND ON AMAZON CATEGORIES



Pet Supplies

\$16



CDs & Vinyl

\$17



Beauty & Care

\$12



Gift Cards

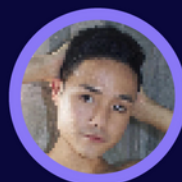
\$32

GEN Y INDIVIDUALS WHO SEARCH FOR THESE INFLUENCERS ON YOUTUBE...



Colleen Vlogs

@ColleenVlogs
3.26M subscribers



Kevin Leonardo

@thecooolestke
322K subscribers



Dhar Mann Studios

@DharMann
19M subscribers



Cocomelon

@CoComelon
165M subscribers



...ON AVERAGE, SPEND ON AMAZON CATEGORIES



DVD & Blu-ray

\$62



DIY

\$15



Video Games

\$28



Subscription Boxes

\$31

THE MEASURE

TOP 5

TRENDS

With an increasingly fragmented media and digital life landscape, understanding how individuals engage with their devices, apps, services and media has become ever more challenging. Brands are turning toward previously hidden behavioral data and trends to gain a competitive edge and better engage with their customers and supporters.



01 — TikTok: Stronger than ever

Gen Z spends an average of 16 hours per week on TikTok, making it a prime engagement platform. Meanwhile, Facebook remains strong among Gen X users, with 5.9 hours per week, and YouTube captures 87% of Gen Zers' attention.



02 — Like, Share, Repeat

Gen Zers on TikTok actively engage by liking, commenting, messaging, and sharing. They browse over 5,400 videos monthly on average, surpassing Millennials by a significant margin.



03 — Multi-screening

Measure's data suggests that media consumption is shifting to multiple screens concurrently. Even heavy TikTok users allocate similar time to other leading iOS apps, raising questions for marketers about user behavior.



04 — Morning Routine

Different generations have distinct first-app preferences. Gen Z leans toward Snapchat, while Millennials prefer common apps like Messages. Understanding this can aid in targeted marketing strategies.



05 — Shopping Diary

High engagement by Gen Z with shopping apps is evident, with 88% making App Store purchases. Amazon dominates the retail app space, capturing 71% of Gen Z's activity. Gen X prefers Walmart, with some even ranking it above Amazon.

WHAT IS MEASURE AND WHY DO YOU NEED IT

The era of clumsy and user-compromising metering data collection methods is over. Today, leading MAANG companies and agencies rely on Measure's Consumer Intelligence solutions to gain insights into consumer attitudes, behaviors, and purchasing habits that extend beyond individual apps. This shift empowers them to stay ahead of the curve and drive growth.

Measure's technology offers a granular view of your target audience's activities across various digital domains, including social media, streaming, and shopping apps. Unlike less reliable options, our data collection methods prioritize accuracy and reliability.

With explicit permission and active user involvement, Measure's technology collects device-based data from an expanding list of apps on both iOS and Android devices. This straightforward approach provides a solid foundation for a better understanding of consumer behavior and preferences.

Contact sales@measureprotocol.com for more information.

ABOUT MEASURE

Measure is a consumer intelligence company that was founded in 2018 by a group of media, ad tech, and market research technology veterans on a mission to help people take ownership of their data to monetize it directly with brands.

Created to solve the challenges in the digital data collection space, Measure is committed to developing innovative technologies and fundamentals that offer new opportunities for marketing, product, data and analytics.

Measure Protocol won the 2022 MRS Award for Best Technology Innovation, and the 2020 Marketing Research and Insight Excellence Award for Technology Impact, powered by Quirks, and is an alumnus of the Creative Destruction Lab's Innovation program.

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Report includes subset of metrics available. Please contact info@measureprotocol.com for complete data availability options. Metrics may be rounded for report efficiency.