

Multiple sources have reported increases in mental health needs since the outbreak of COVID-19, as shown by increasing rates of anxiety, depression, stress, sleep disturbance, and substance use.^[1,2,3,4] Increased rates of mental health symptoms are especially prevalent among those most directly impacted, such as frontline medical workers^[5] and children.^[6] Given unique barriers to care that currently exist (e.g. physical distancing measures that may limit contact with providers), people are looking to digital tools to help them manage these stressors. This may potentially lead to an important opportunity for digital mental health.^[7,8] Indeed, many digital mental health companies have reported that they have received record numbers of users during the pandemic.^[9,10,11]

As such, Tri-City expressed interest in learning about the traffic and use of the following apps since the onset of COVID-19 in March 2020:

- Calm
- Headspace
- iChill
- myStrength
- Sanvello
- Wysa

This learning update presents marketplace performance data on the number of downloads and daily active users (DAU) to examine traffic and use. The data reflects users in the United States during the time period of March – September 2020. The data is combined across iOS and Android apps stores. Data separated for iOS and Android is available on request.

METRIC	DEFINITION
Number of Downloads	Number of new users downloading the app for the first time over a defined time period. ^a
Daily Active Users (DAU)	Number of unique devices that created at least one session (e.g., opened the app) in a 24-hour period. ^b
Average Daily Active Users (DAU)	The average DAU over a period of time. ^c

Overall Number of Downloads and Daily Active Users by Month

Below are the number of downloads and daily active users over two-month periods for each app.

Number of Downloads							
	Jan-Feb	Mar-Apr	% change	May-Jun	% change	Jul-Aug	% change
Calm	2,469,074	2,767,405	+12%	3,128,669	+13%	2,796,824	-11%
Headspace	1,282,453	1,279,537	-0.2%	1,100,017	-14%	741,374	-33%
iChill	80	72	-10%	961	+1,235% ^d	327	-66%
myStrength	7,859	15,157	+93%	34,662	+129%	26,941	-22%
Sanvello	48,824	175,191	+259%	234,537	+34%	264,983	+13%
Wysa	68,533	47,883	-30%	58,350	+22%	66,051	+13%

*NOTE: Percent change represents change from previous two-month period

^a This metric only captures overall new users. Re-downloads do not count toward this metric (i.e., if you break your phone, get a new phone, re-download the same app again – the re-download will not count). App updates also do not count toward this metric.

^b This means that a user who opened the app once and a user who opened the app 10 times in the last 24-hours are both only counted as one DAU.

^c Any time that you are looking at DAU over an aggregated period of time (e.g., a week, month, quarter, year, etc.) you are looking at the Average DAU. For example, if you look at the DAU for April 2018, then you are looking at the average of the 30 daily DAU values in that month.

^d Please note this app had small number of total downloads and DAUs.

Average DAU

	Jan-Feb	Mar-Apr	% change	May-Jun	% change	Jul-Aug	% change
Calm	1,954,907	1,975,848	+1%	2,234,581	+13%	2,246,286	+1%
Headspace	939,467	1,055,420	+12%	960,340	-9%	847,818	-12%
iChill	17	15	-15%	78	+423%	40	-49%
myStrength	984	2,184	+122%	5,800	+166%	5,271	-9%
Sanvello	24,684	60,908	+147%	117,792	+93%	156,249	+33%
Wysa	37,471	26,538	-29%	29,023	+9%	29,442	+1%

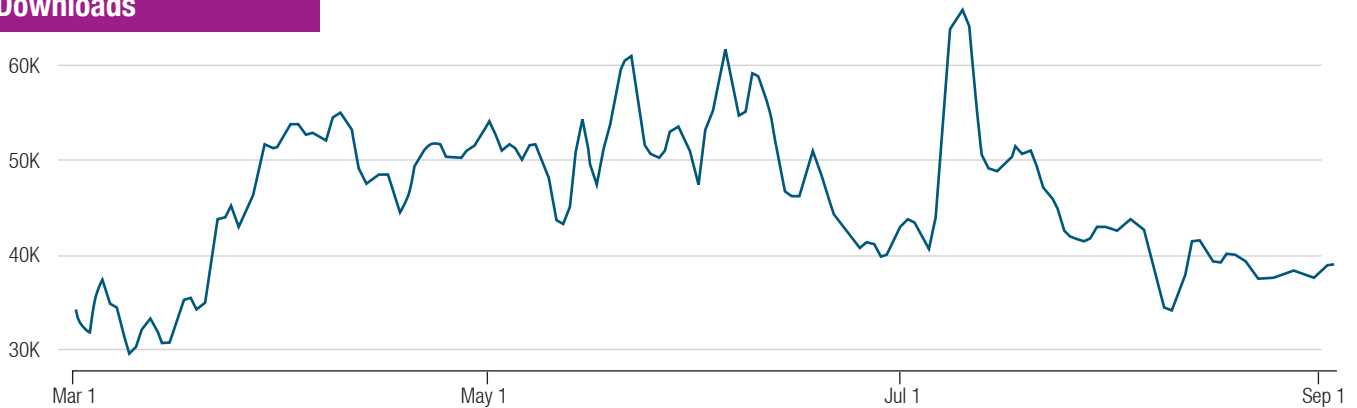
*NOTE: Percent change represents change from previous two-month period

Detailed Number of Downloads and Daily Active Users by App

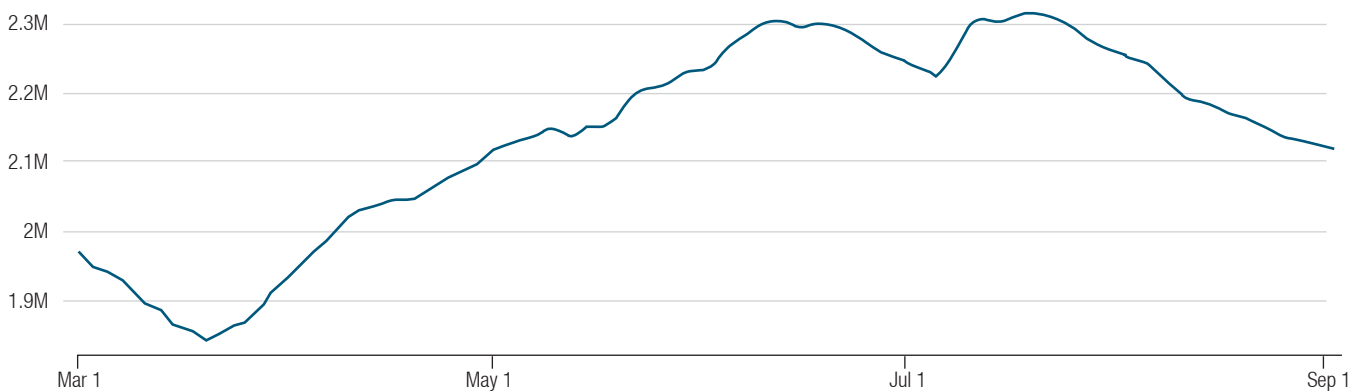
Below are the number of downloads and daily active users for each app between March 1-September 3, 2020.



Downloads



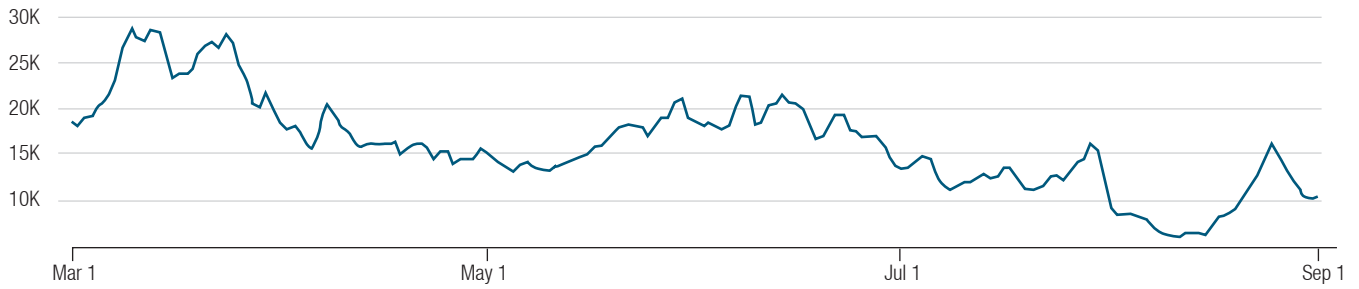
Daily Active Users



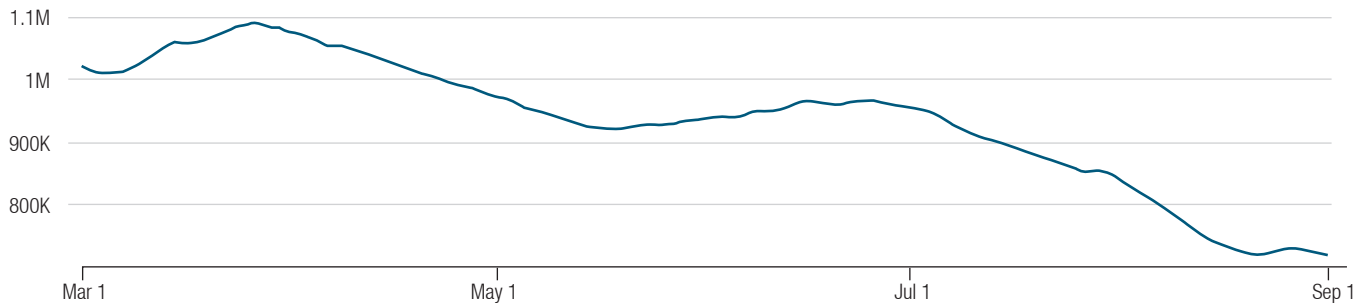


Headspace

Downloads

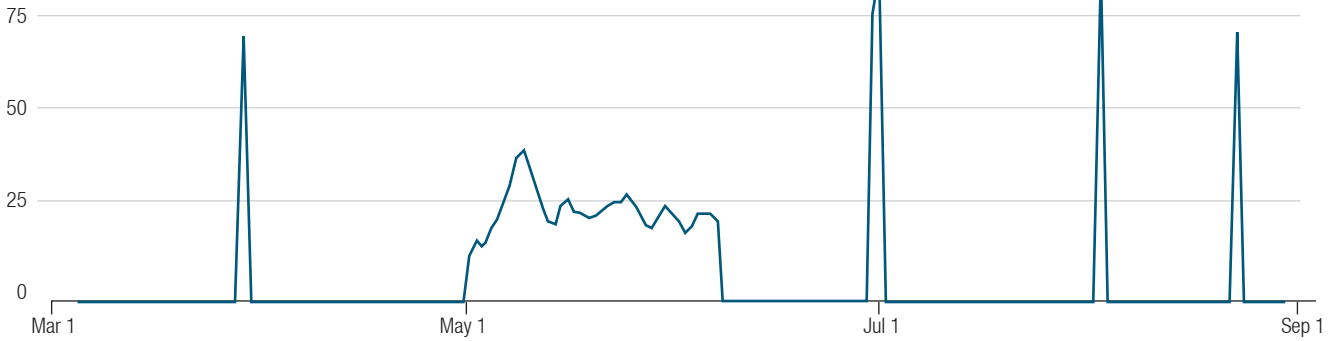


Daily Active Users

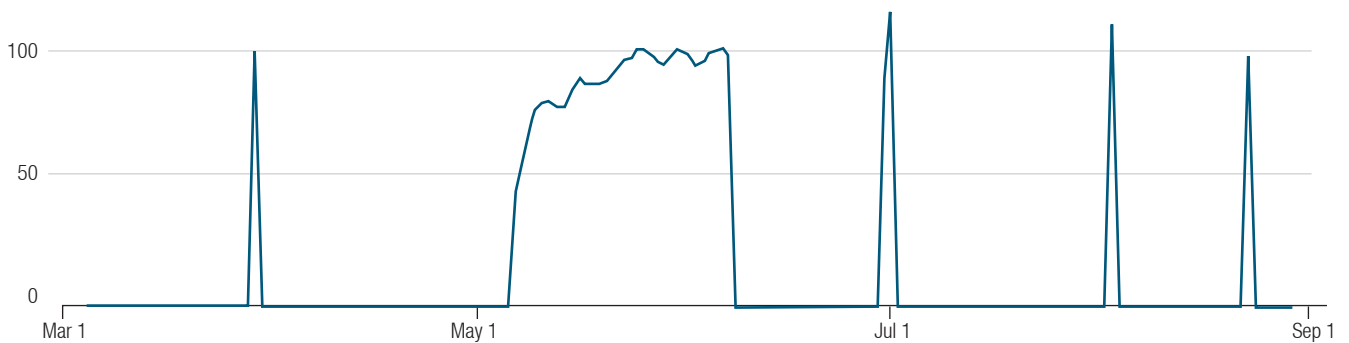


iChill

Downloads



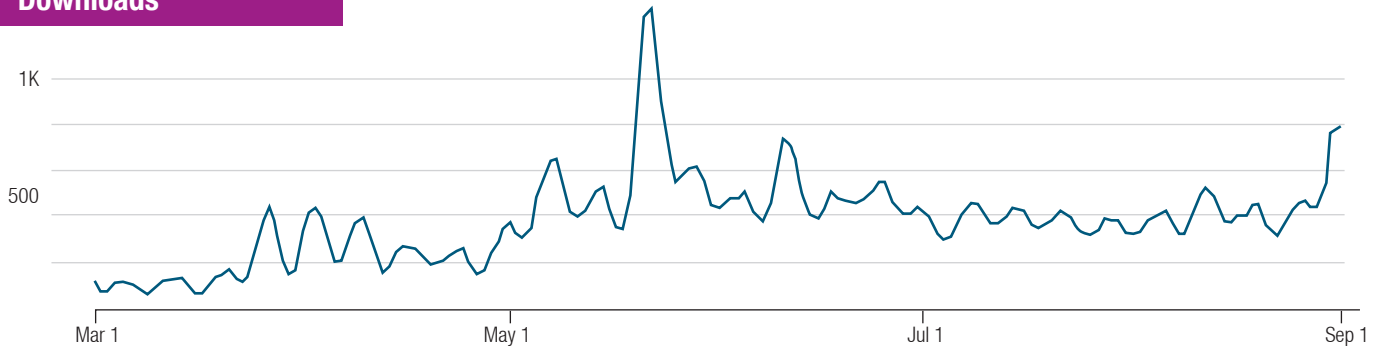
Daily Active Users



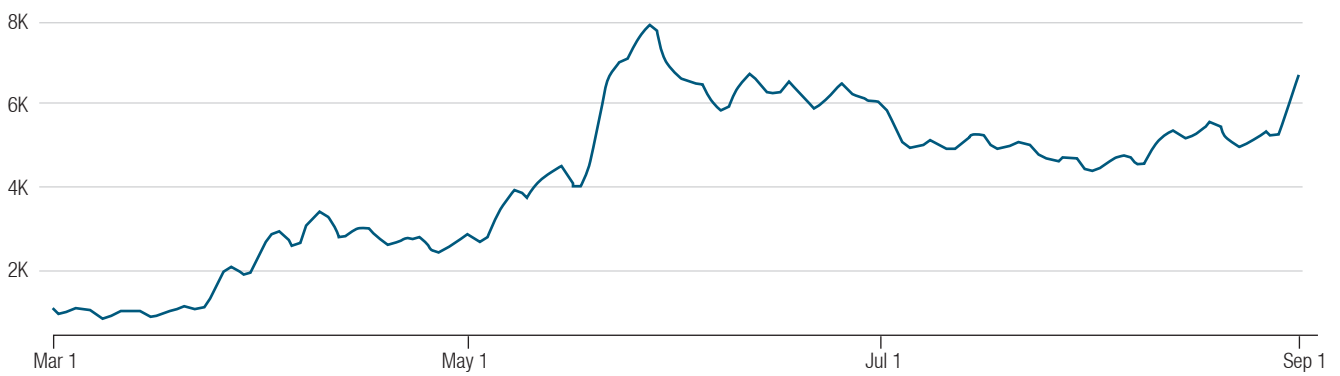


myStrength

Downloads

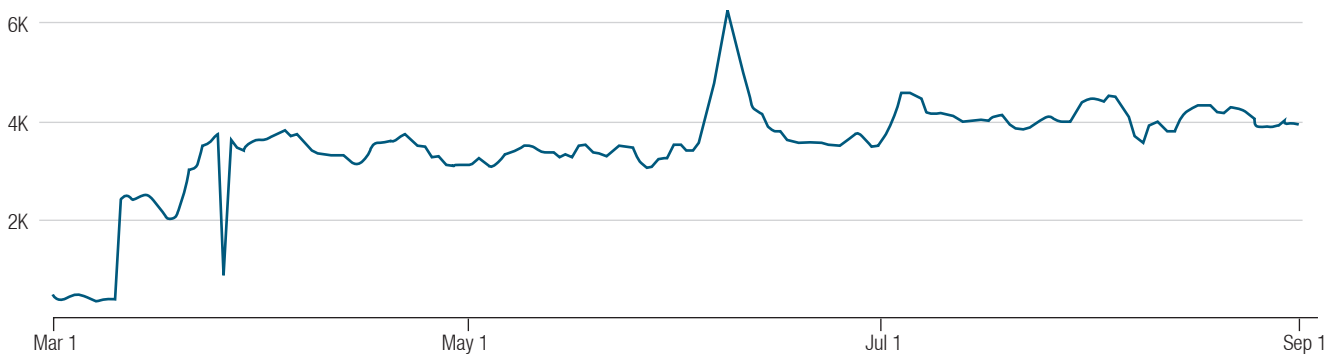


Daily Active Users

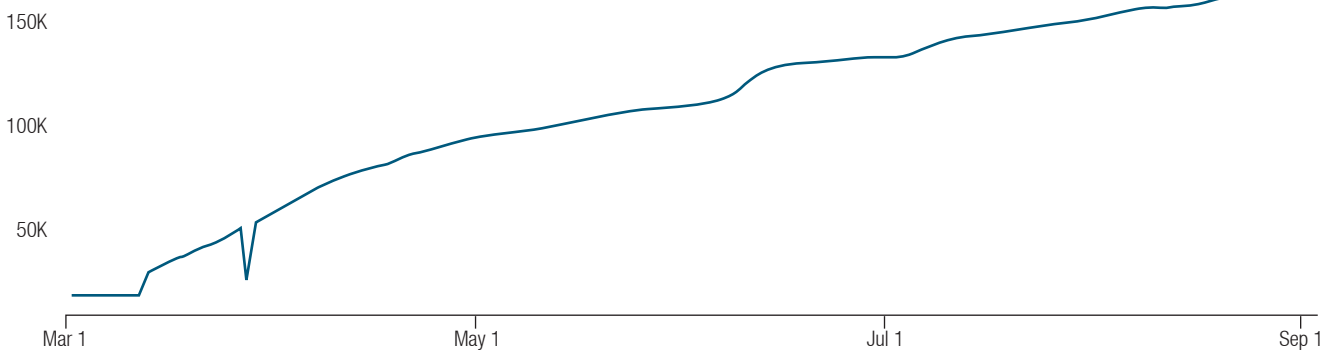


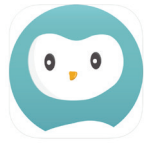
Sanvello

Downloads



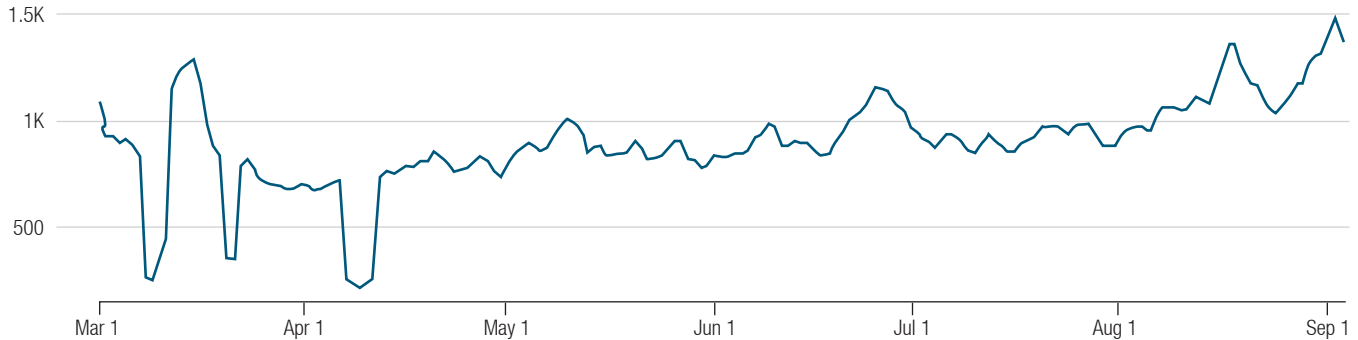
Daily Active Users



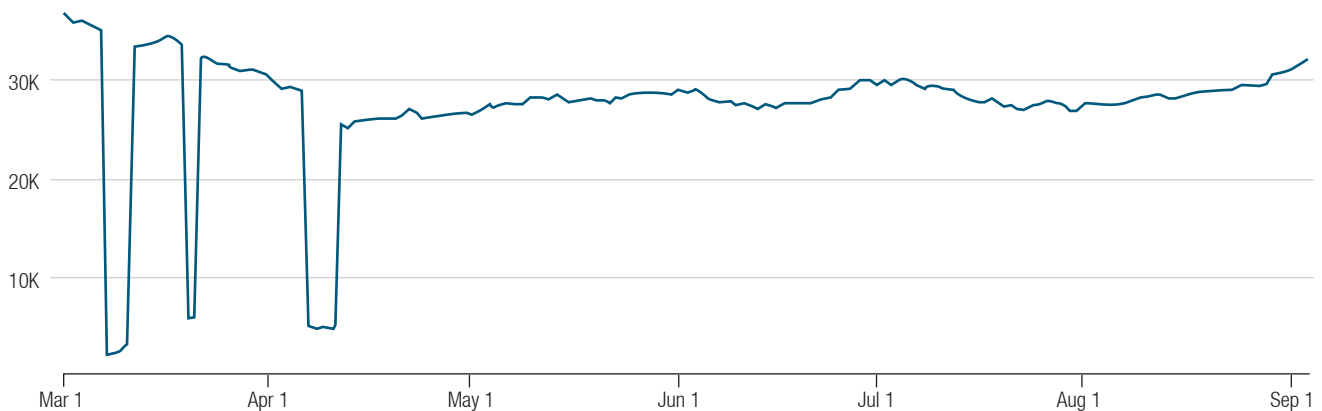


Wysa

Downloads



Daily Active Users



Notable Partnerships

Below are links to articles describing notable partnerships for each app that may have affected market performance.

[Calm membership included on American Express cards \[May 18, 2020\]](#)

[Calm available to Kaiser Permanente members \[May 19, 2020\]](#)

[Headspace free for healthcare professionals \[March 16, 2020\]](#)

[Headspace available to NY state residents \[Apr 6, 2020\]](#)

[Headspace available to all LA County Residents \[Apr 28, 2020\]](#)

[Headspace made available for free for people who are unemployed \[May 14, 2020\]](#)

[myStrength available to Kaiser Permanente members \[April 2, 2020\]](#)

[Sanvello announced free premium access for anyone \[March 20, 2020\]](#)

[Sanvello releases free clinician dashboard to mental health professionals \[Apr 16, 2020\]](#)

[Aetna International announces partnership with Wysa \[May 18, 2020\]](#)

[Wysa being offered for free at Cincinnati Children's Hospital \[Aug 8, 2020\]](#)

References

- ¹ *A third of Americans now show signs of clinical anxiety or depression - The Washington Post.* (n.d.). Retrieved September 10, 2020, from <https://www.washingtonpost.com/health/2020/05/26/americans-with-depression-anxiety-pandemic/?arc404=true>
- ² Panchal, N., Kamal, R., Muñana, C., Aug 21, P. C. P., & 2020. (2020, August 21). The Implications of COVID-19 for Mental Health and Substance Use. *KFF*. <https://www.kff.org/coronavirus-covid-19/issue-brief/the-implications-of-covid-19-for-mental-health-and-substance-use/>
- ³ *"Staggering" Increase in COVID-Linked Depression, Anxiety.* (n.d.). Medscape. Retrieved September 10, 2020, from <http://www.medscape.com/viewarticle/934882>
- ⁴ Twenge, J. M., & Joiner, T. E. (2020). US Census Bureau-assessed prevalence of anxiety and depressive symptoms in 2019 and during the 2020 COVID-19 pandemic. *Depression and anxiety*.
- ⁵ Pappa, S., Ntella, V., Giannakas, T., Giannakoulis, V. G., Papoutsis, E., & Katsaounou, P. (2020). Prevalence of depression, anxiety, and insomnia among healthcare workers during the COVID-19 pandemic: A systematic review and meta-analysis. *Brain, behavior, and immunity*.
- ⁶ Courtney, D., Watson, P., Battaglia, M., Mulsant, B. H., & Szatmari, P. (2020). COVID-19 impacts on child and youth anxiety and depression: challenges and opportunities. *The Canadian Journal of Psychiatry*, 0706743720935646.
- ⁷ Torous, J., Myrick, K. J., Rauseo-Ricupero, N., & Firth, J. (2020). Digital mental health and COVID-19: Using technology today to accelerate the curve on access and quality tomorrow. *JMIR mental health*, 7(3), e18848.
- ⁸ Ben-Zeev, D. (2020). The digital mental health genie is out of the bottle. *Psychiatric Services*, appi-ps.
- ⁹ As Headspace booms, the app's popularity outpaces its evidence. (2020, August 7). *STAT*. <https://www.statnews.com/2020/08/07/headspace-mindfulness-covid19-employers/>
- ¹⁰ *Healthcare Apps: A Boon, Today And Tomorrow.* (n.d.). Retrieved September 10, 2020, from <https://www.forbes.com/sites/eladnatanson/2020/07/21/healthcare-apps-a-boon-today-and-tomorrow/#5700a6101bb9>
- ¹¹ *Telemedicine, Once a Hard Sell, Can't Keep Up With Demand - WSJ.* (n.d.). Retrieved September 10, 2020, from <https://www.wsj.com/articles/telemedicine-once-a-hard-sell-cant-keep-up-with-demand-11585734425>