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2020:
The Year of Streaming

The launch of Disney+ has ushered in a whole new era in the streaming wars. In its first three months alone, the media giant amassed over 28 million subscribers in five countries before it expanded to seven more in March. While Disney+ is making dreams come true for viewers, the streaming service dove headfirst into a highly competitive landscape that is now seeing unprecedented change with a mass social distancing movement brought on by COVID-19.

Clearly, 2020 will be a big year for streaming. As consumers adapt to the new normal, we'll see the launch of Quibi on April 6, HBO Max in May, and NBCUniversal's Peacock on July 15, further challenging a strong group of established players.

To discover how brands can adapt in a thriving yet crowded space, **Apptopia** and **Braze** joined forces and datasets to examine the effect of the arrival of Disney+ and immediate industry reaction to COVID-19. We analyzed and identified trends, growth, and metrics for success that can help contextualize what kind of growth to expect this year.

Already, the global pandemic is transforming both streaming behavior and media. In March, we saw a 30.7% increase in streaming sessions. Along with a week-over-week increase, the industry began to evolve: Pixar announced it would release Onward, an animated movie currently in theaters, to digital marketplaces on March 20 and to Disney+ on April 3. Similarly, on March 22, Amazon launched Prime Video Cinema, a service that allows consumers to rent or buy recently released movies.

International Entertainment & Streaming Sessions Throughout the Beginning of COVID-19
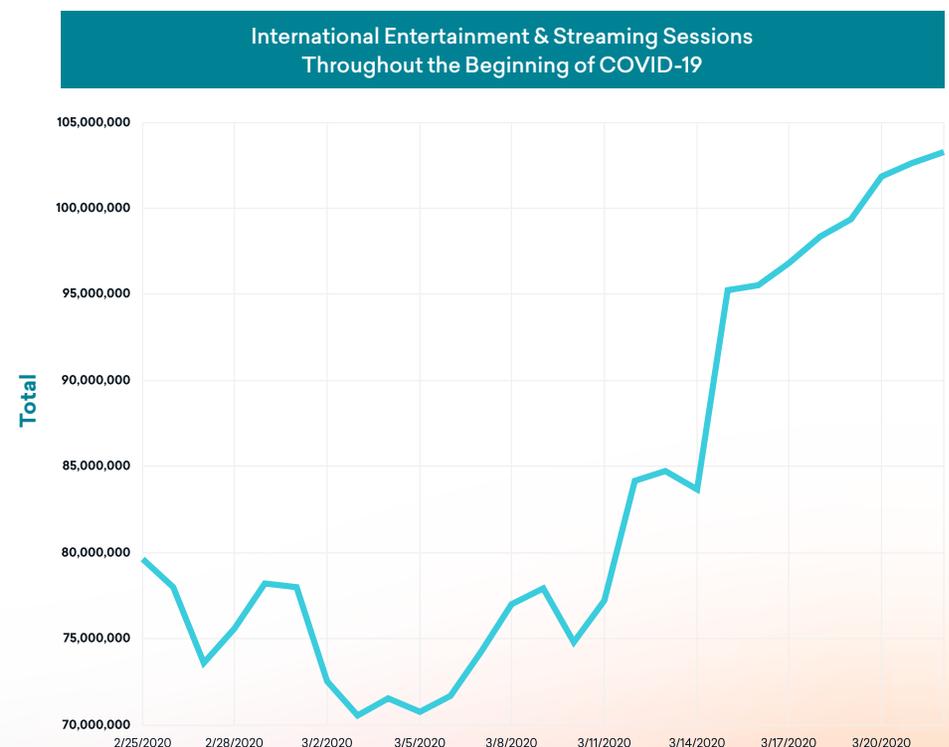
Additionally, we looked at 35 streaming services over eight months to determine who's succeeding, what that success looks like, how they're doing it, and which best practices can translate to different industries. Serving up a TV box office smash isn't enough—you need the customer engagement strategy to back it up. There's a lot brands can learn from how streaming services get users off the content carousel and seasons-deep into a marathon.

Trends We'll Cover

1   Top Performers

2   Content Drivers

3   Customer Engagement Best Practices

4   Worldwide Top Ten Lists

apptopia

Apptopia provides competitive intelligence for the mobile app economy. Apptopia was founded on the belief that the mobile app community requires transparency to level the playing field and make way for innovation and industry advancements.

braze

Braze is a comprehensive customer engagement platform that powers relevant and memorable experiences between consumers and the brands they love.

Key Findings

Before we launch into the numbers, here are some quick highlights.

Just Can't Wait to Be King

Despite the crowded market, Disney+ proves there's still room for new streaming services. Disney+ saw **22 million downloads within the four weeks of its launch.**

Go the Distance

Adult Swim's *Rick and Morty,* a cult favorite, proved to be the most effective content for both short-term and long-term MAU growth during the period of August 2019 to March 2020. While more total people watched *Game of Thrones* or *The Marvelous Mrs. Maisel* within the same time period, **no show had a more dramatic and lasting increase on DAU and total sessions than Rick and Morty.**

Part of Your World

While binge-worthy shows certainly sweeten the deal, the top performing streaming services drove success by pairing quality content with a comprehensive customer engagement strategy. Top performers were **1,051% more likely to send action-based messages** and up to **300% more likely to send messages on mobile-native channels.**

Brief Note on the Methodology

While some of us may agree that serving up *Cheer* should put you at the top of the pyramid, we took a more methodical approach to analyzing the data. To determine success, we examined a variety of different factors:

- Average Revenue per Daily Active User **(ARPDAU)**

- Downloads

- In-App Purchase Revenue **(IAP Revenue)**

- Monthly Active Users **(MAUs)**

- Time spent in app

As Disney+ first launched in the US, Canada, and the Netherlands on November 12, we examined data for the three months prior and three months after to determine a benchmark to assess potential changes.. For this portion of the analysis, we focused on the US data as Disney+ didn't yet have widespread availability. We used global and European data whenever available and applicable, and have labeled findings accordingly.

After further analysis and a closer look at what catalyzed growth, we selected percentage change in monthly active users to be the main metric. We felt it most accurately conveyed how brands can grow in a crowded space as well as how they can increase their audiences and revenue even when new competitors make a splash.

Content Is Still King: What Drives DAU Growth

After deep analysis, we identified the six top performing streaming services during the months leading up to and following the Disney+ launch:

- **Adult Swim**, Cartoon Network's adult-oriented label that maybe is run by a pickle?

- **Amazon Prime Video**, Amazon's streaming juggernaut

- **Crunchyroll**, for all things anime

- **DC Universe**, the best source on Earth Prime for comic book movies and TV shows

- **YouTube**, the beloved User Generated Content (UGC) source for beauty vlogger drama

- **YouTube TV**, YouTube's Over-The-Top (OTT) platform for live and on-demand TV

Percentage Change of MAUs for Top Performing Streaming Services
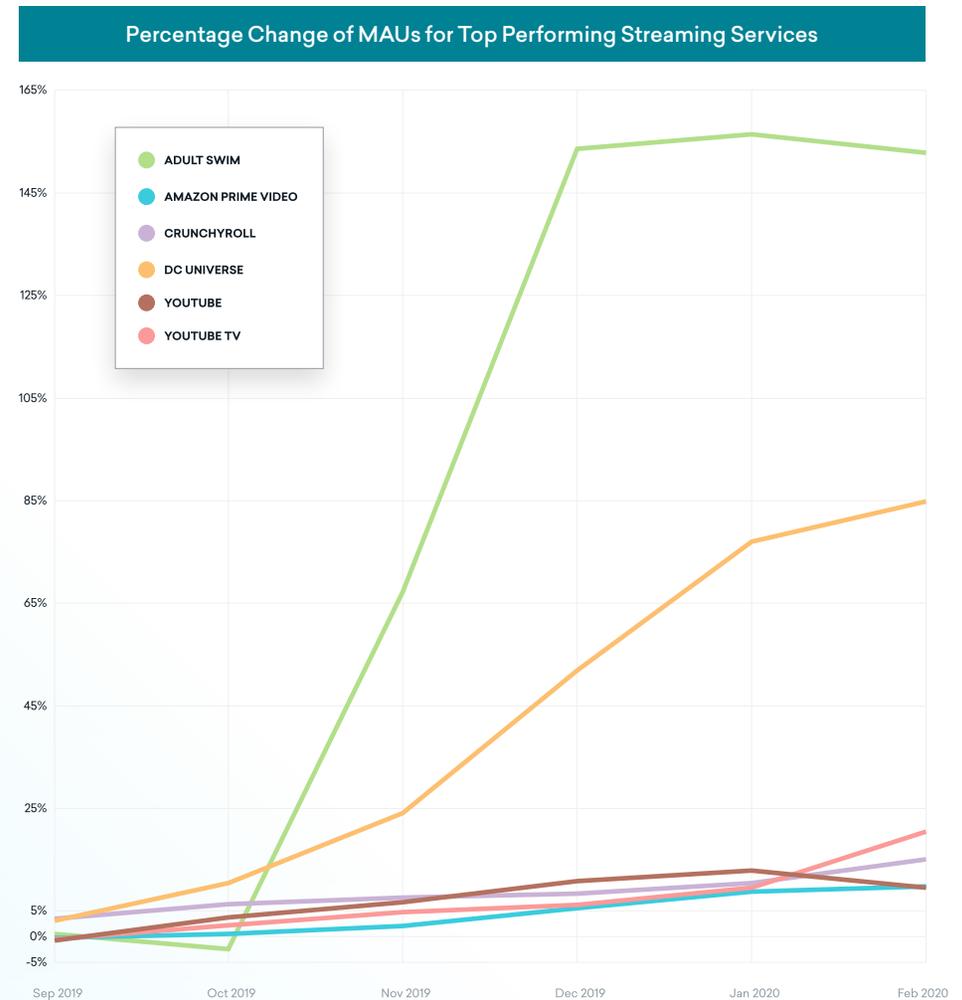
Content Is Still King: What Drives DAU Growth

Upon analysis of the data, we discovered we could back up what most people already know: We're an enthusiastic culture of binge-watchers. When a new season drops, DAUs increase dramatically—and this "boost" can still be felt long after the show is over.

Note: It's healthy when the DAU curve is ahead of new installs before a show debuts. It shows general engagement, such as people watching earlier seasons or just enjoying other content. While we saw both DAU and downloads increase when a new season drops, what's more telling is the concurrent spike in sessions: The new show might cause a bunch of downloads, but not every user watches it. However, those who did, loved it and stayed.
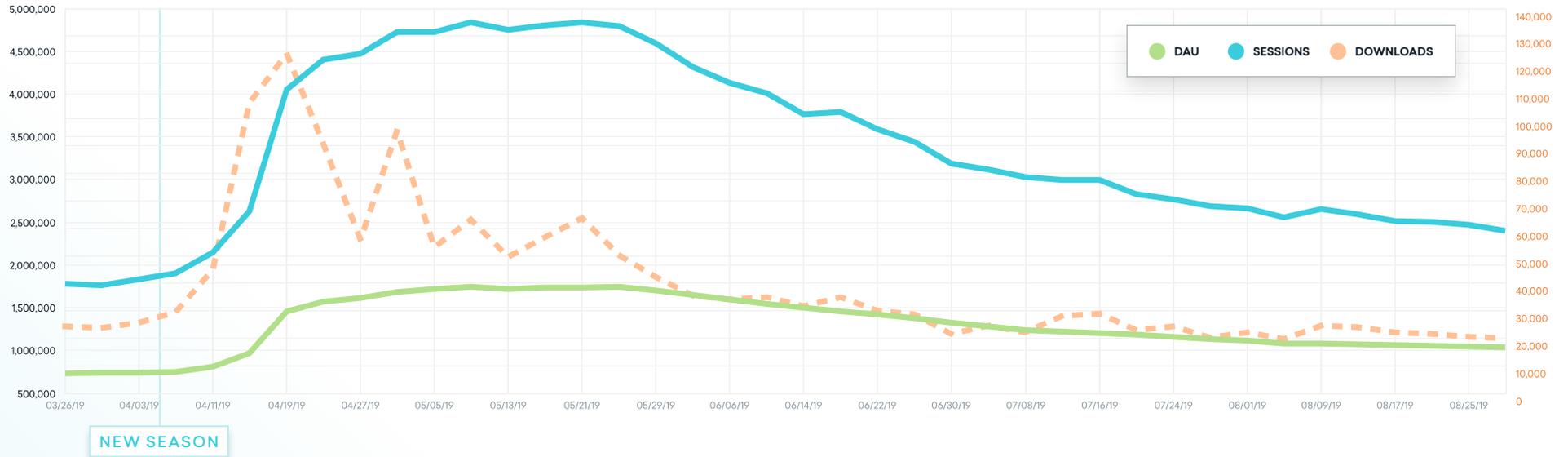
Rick and Morty, Adult Swim — **504% Increase in DAU**
Part one of season four ran from November 10, 2019 to December 15, 2019.

Legend: DAU · SESSIONS · DOWNLOADS

NEW SEASON
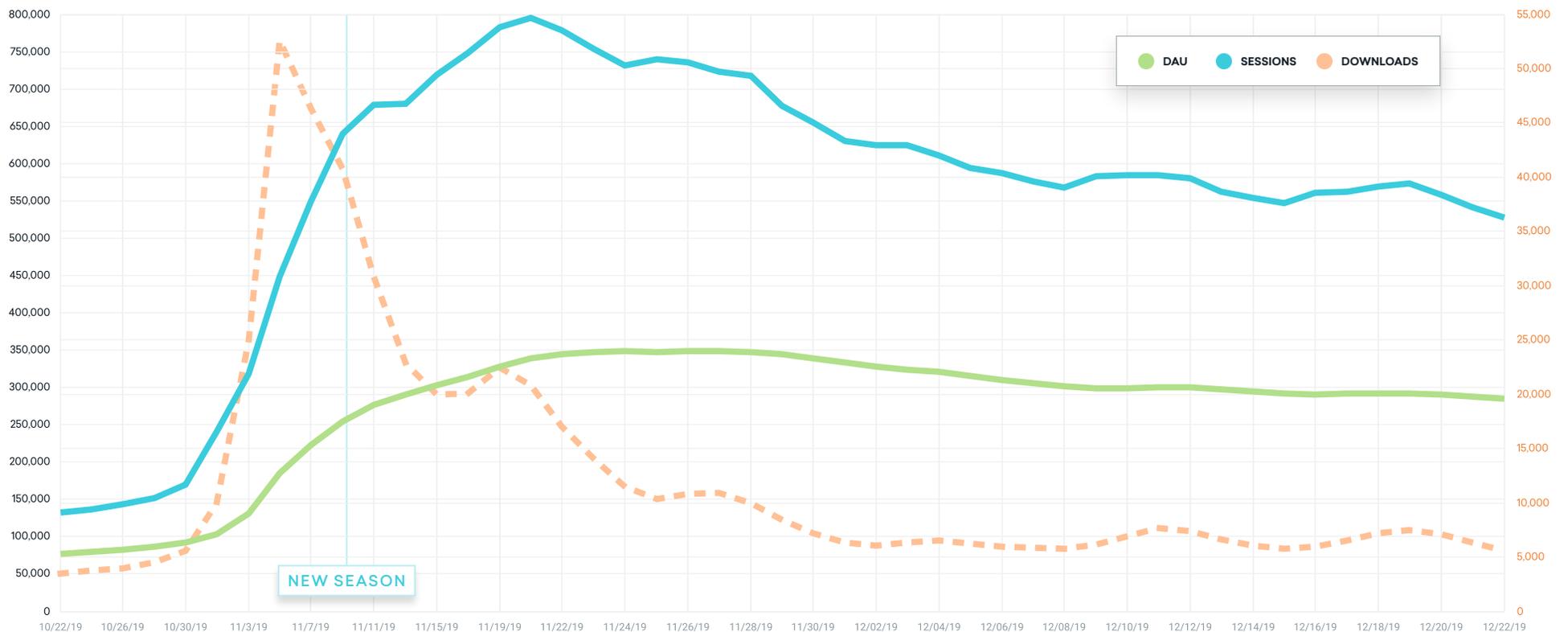
*US Data

Game of Thrones, HBO — 131% Increase in DAU
Season eight ran from April 4, 2019 to May 19, 2019.

DAU   SESSIONS   DOWNLOADS

NEW SEASON
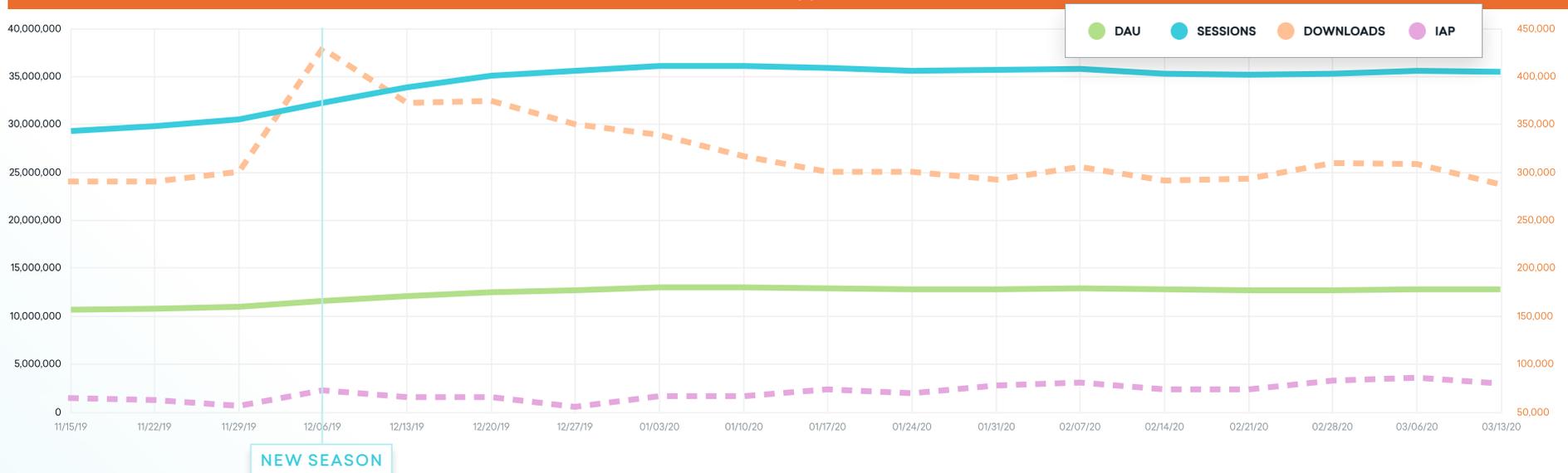
Harley Quinn, DC Universe — 47% Increase in DAU
The first season ran from November 29, 2019 to February 21, 2020.

DAU   SESSIONS   DOWNLOADS

NEW SEASON
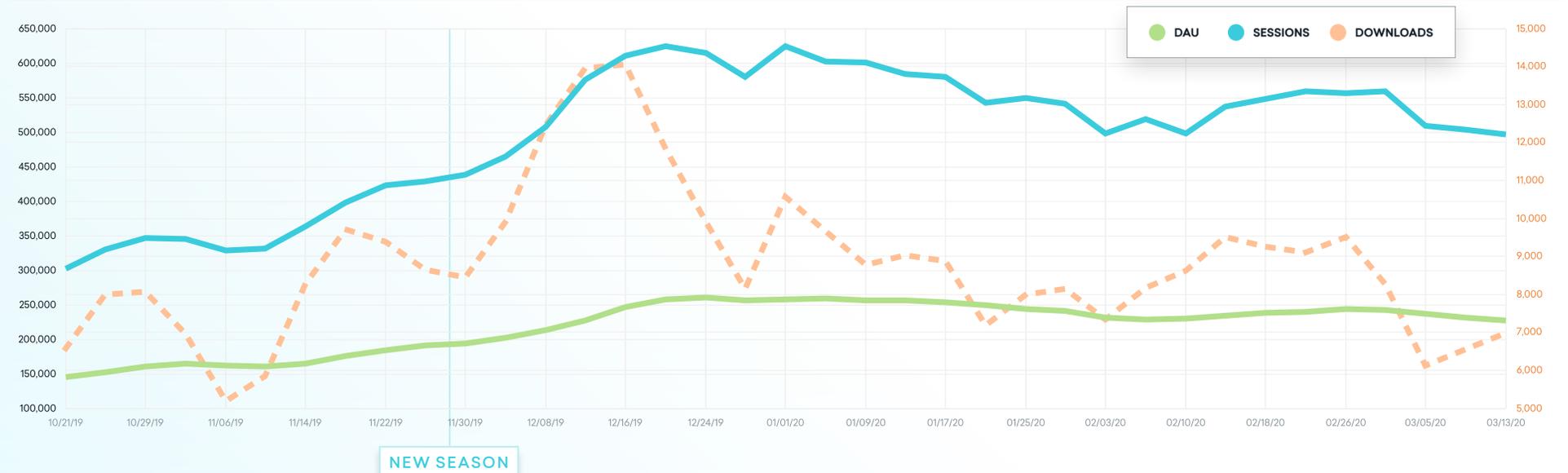
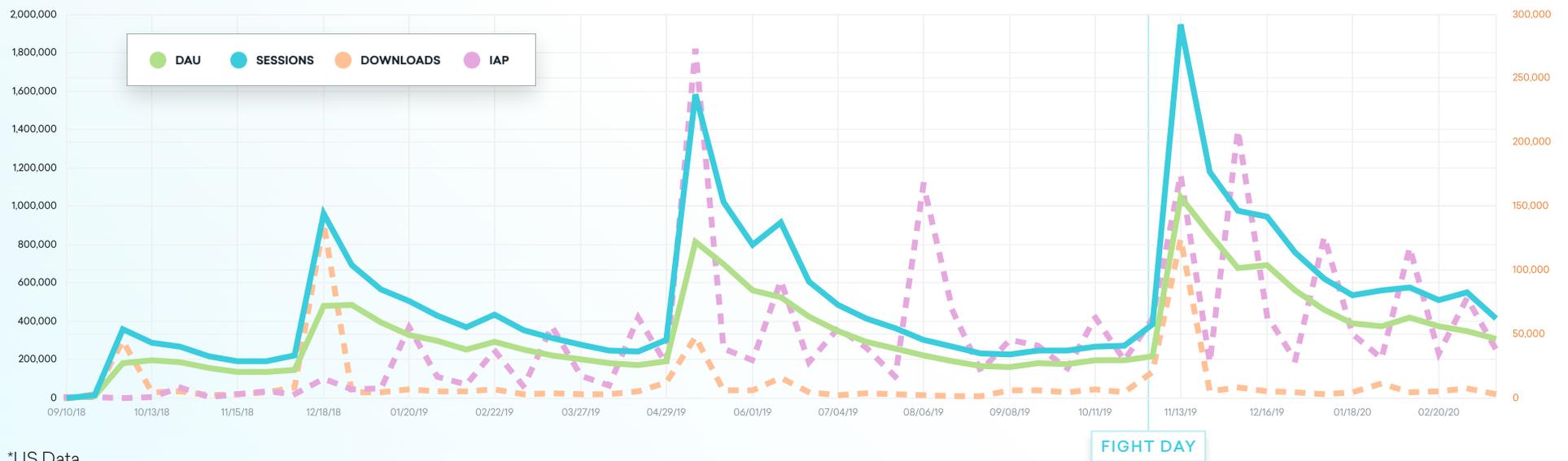*US Data

The Marvelous Mrs. Maisel, Amazon Prime Video — **19% Increase in DAU**
The entire third season dropped on December 6, 2019.

DAU · SESSIONS · DOWNLOADS · IAP

NEW SEASON

We see a similar effect in the sports world: Big events, like world champion boxing matches, cause drastic spikes in engagement.

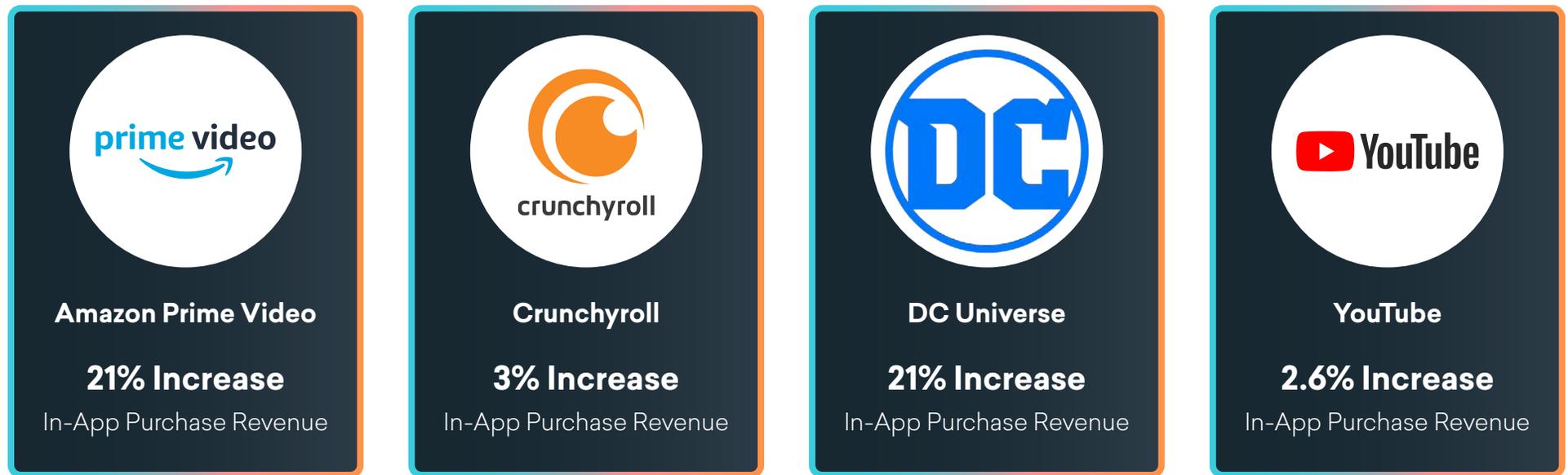**Canelo vs. Kovalev,** DAZN — **30% Increase in DAU**
The fight happened November 2, 2019.

DAU · SESSIONS · DOWNLOADS · IAP

FIGHT DAY

*US Data

More Rivals, More Revenue

Beyond the clout that accompanies high engagement, each of our top performers saw a noticeable impact on their bottom lines. When looking at the three months prior to the launch of Disney+ compared to the three months after, our leaders saw an increase in in-app purchase revenue. Subscriptions make up the overwhelming majority of IAP for apps with purchasing options. This following is global data:

Amazon Prime Video

21% Increase
In-App Purchase Revenue

Crunchyroll

3% Increase
In-App Purchase Revenue

DC Universe

21% Increase
In-App Purchase Revenue

YouTube

2.6% Increase
In-App Purchase Revenue

The following streaming services also saw a boost in in-app purchase revenue from the three months before the launch of Disney+ (August, September, and October) to three months after (December, January, and February). For sports apps, this has to do with the start of their season rather than Disney+:

DAZN
14.1% Increase
In-App Purchase Revenue

ESPN
28.2% Increase
In-App Purchase Revenue

iQIYI
7.5% Increase
In-App Purchase Revenue

NBA App
91% Increase
In-App Purchase Revenue

Philo
168% Increase
In-App Purchase Revenue

Plex
13.5% Increase
In-App Purchase Revenue

Great Content Relies on Strong Engagement Strategy for Long-Term Success

We had a hunch that even the most exciting show needed the support of a robust customer engagement strategy to be successful. As it turns out, there's a strong correlation between personalized, relevant communication and MAU—meaning the key to success is coupling compelling content with customer engagement best practice.

The most successful brands are messaging their users on native mobile channels, which makes them a great fit for audiences that are increasingly engaging with longform content on mobile devices. Also, combining push and in-app messages saw the highest level of engagement in the Braze Cross-Channel Data Report, suggesting these channels are fundamentally complementary for driving engagement.

The most successful brands are messaging their users where they are, with messages relevant to their streaming app.

During the Months Surrounding the Launch of Disney+, Top Performers Were

21% More Likely to Send Push Notifications

300% More Likely to Send In-App Messages

*Global data
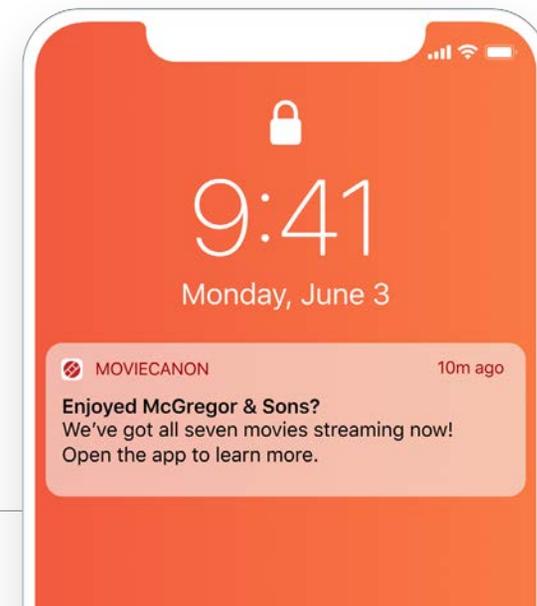
Customer Engagement Tactics and Success

Brands can set custom events—events they create and track—as goals for conversions, instead of using the default metric, which defines a conversion on whether or not a message drives someone to open an app.
By setting and tracking clearly-defined goals, brands can work towards success with every message they send.

1,051% More Likely to Send
Action-Based Messages

422% More Likely to Define Conversion
Based on Custom Events

Creating a custom conversion event in the Braze Dashboard
to track premium subscription upsells from referrals

Top Global Streaming Apps in 2020

As much as we crave fresh finds on the neverending quest of what to watch, ruling the content kingdom requires more than novelty. Here's who currently reigns supreme (aka after everyone has finished bingeing *The Mandalorian*).

Top 10 Downloaded Streaming Apps in 2020*					
Global			**Europe**		**US**	

	Global			Europe			US		
1	Netflix	59.1M		Netflix	14M		Disney+	14.1M
2	YouTube	39.4M		Amazon Prime Video	6.6M		Netflix	11.9M
3	Amazon Prime Video	27.1M		YouTube	5.8M		Hulu	8.1M
4	YouTube Kids	24.6M		YouTube Kids	3.7M		YouTube	7.9M
5	Hotstar	21.2M		Twitch	3.5M		Amazon Prime Video	6.4M
6	BIGO LIVE	20.9M		BBC iPlayer	1.3M		Tubi	5.6M
7	Disney+	17.5M		ITV Hub	1.2M		Roku	4.8M
8	Twitch	12.4M		HBO GO	1M		YouTube Kids	3.6M
9	Xigua Video	11.6M		Crunchyroll	500k		Twitch	3.2M
10	Tubi	10M		Funimation	330k		Pluto TV	2.6M

Consumers Still Put Up With Commercials

Tubi proves there continues to be a market for free streaming content supported by advertising revenue. Acquired by Fox in mid-March, Tubi was the tenth most downloaded app in our study.

Europeans Are Still Watching

Due to the many competing countries and cultures, Europeans have an excess of homegrown apps to choose from. Netflix's ubiquity is its strength, giving it a large margin of victory.

Disney+ for President

Disney+ beat out Netflix for most installed streaming video app in the United States, a feat no other competitor has ever accomplished.

*Total for January, February, and March 2020

Top 10 Streaming Apps by IAP Revenue in 2020*					
Global		**Europe**		**US**	
1	YouTube	$110M	Netflix	$14.7M	YouTube	$60M
2	Netflix	$68M	YouTube	$11M	Disney+	$48.5M
3	Tencent Video	$63.3M	Twitch	$3.7M	Netflix	$30.1M
4	Disney+	$61.2M	Amazon Prime Video	$1.8M	Hulu	$23.5M
5	BIGO LIVE	$40.2M	Disney+	$1.7M	HBO NOW	$17.4M
6	Youku	$34.2M	myCANAL	$1.6M	BIGO LIVE	$14.3M
7	Hulu	$23.5M	ITV Hub	$1.5M	Twitch	$12.5M
8	Twitch	$19.9M	Crunchyroll	$880k	STARZ	$10.8M
9	HBO NOW	$17.4M	DisneyLife	$723k	Crunchyroll	$5.9M
10	STARZ	$10.8M	hayu	$558k	CBS	$4.7M

Note: the table above has a leading rank column; each region group (Global, Europe, US) has an app name column and a revenue column.

We Can't Get Enough YouTube

While new competitors can carve out success, the financial side of the mobile streaming market is still ruled by YouTube. One of the first in the game, YouTube remains a world leader in revenue generation via mobile.

The Most Popular App You've Never Heard Of

BIGO LIVE, a Singapore-based service similar to Twitch, uses a combination of engaging tactics and its own internal currency to gamify live streaming. It's the latest in the trend of Asian apps seeing success in the US.

*Total for January, February, and March 2020

Top 10 Streaming Apps by Time Spent in App in 2020*		
Global	**Europe**	**US**
1 YouTube Kids	YouTube Kids	YouTube Kids
2 Netflix	Netflix	Netflix
3 YouTube	YouTube	YouTube
4 Amazon Prime Video	Amazon Prime Video	Disney+
5 Hotstar	Twitch	Hulu
6 Disney+	HBO GO	Amazon Prime Video
7 Tubi	Disney+	Tubi
8 Xigua Video	BIGO LIVE	Roku
9 Hulu	Crunchyroll	Pluto TV
10 Tencent Video	BBC iPlayer	CBS All Access

Like a Kid in an App Store

YouTube kids is a time-passing, educating, give-me-a-break savior for parents. Whether on a smartphone or table, parents are putting YouTube kids on for their children and letting them soak it in for long periods of time (relief).

Live Long and Prosper

With the creation of CBS All Access, CBS is generating a larger mobile audience than other streaming apps from linear TV networks like ABC, NBC, and Fox, largely due to the new Star Trek: Picard series. The week the show launched saw CBS's second-best sign up week ever, just behind the week of the 2019 Super Bowl. CBS came in at number 10 in the US for total time spent in app.

*Total for January, February, and March 2020

Conclusion

While the initial launch of Disney+ has come and gone, 2020 will see a whole new set of players—and formats—ready to steal the show (Quibi, we're looking at you). We can anticipate that we'll see more from Disney+ as it rolls out to the remainder of Europe and releases a set of hotly-anticipated Marvel shows. Outside of Netflix's upcoming Selena series, we look forward to seeing how the next set of competitors and legacy streaming services work to stay relevant and binge-worthy, especially in the midst of COVID-19.

We'll continue to track and identify the changes in the industry as new competitors launch, popular content is released, and brands evolve their strategy to provide even more value to their consumers. We look forward to sharing more insights with you soon.

Lastly, Apptopia and Braze are here to help power relevant, memorable customer experiences as brands adapt to the new normal. We fully believe in the creativity of the industry to find new, empathetic ways to provide value to their consumers.

Ready to continue the conversation? **_Schedule a demo_** *with Apptopia, or* **_check out_** *how Africa's leading streaming service, Braze customer Showmax, increased subscribers by over 204%.*

Methodology

This analysis spans August 2019 to March 2020 and looks at 35 streaming services; Adult Swim, Amazon Prime Video, BIGO LIVE, CBS, Crunchyroll, DAZN, DC Universe, Disney+, Epix, ESPN, Food Network, HBO GO, HBO NOW, Hotstar, Hulu, iQIYI, JioTV, Mango TV, National Geographic, NBC, Netflix, Pantaya, Pluto TV, STARZ, Tencent Video, TLC, TNT, Tubi, Twitch, VRV, Xigua Video, Youku, YouTube, YouTube Kids, and YouTube TV. Together, Braze and Apptopia analyzed the number of downloads, in-app purchase revenue, time spent in app, average revenue per Monthly Active User (MAU) and average revenue per Daily Active User (DAU) to determine which brands were most successful, which we defined as having a consistent increase over three periods (avg August, September, October; November; avg December, January, February; USA data only). Monthly Active Users (MAUs) are defined as the number of unique users that launched a particular app in a given month; Daily Active Users (DAUs) are the number of unique users that launched a particular app in a given day. Downloads are net new installs, which are essentially new users. Apptopia in-app purchase revenue represents how much revenue the publisher takes after home after store fees. Europe data is comprised of the top ten countries in the continent by population. Google Play does not operate in China, so all data from apps only available in China is iOS only.