



The State of Streaming Apps

—
An Analysis of Streaming App Market Trends and Top Apps in the U.S.



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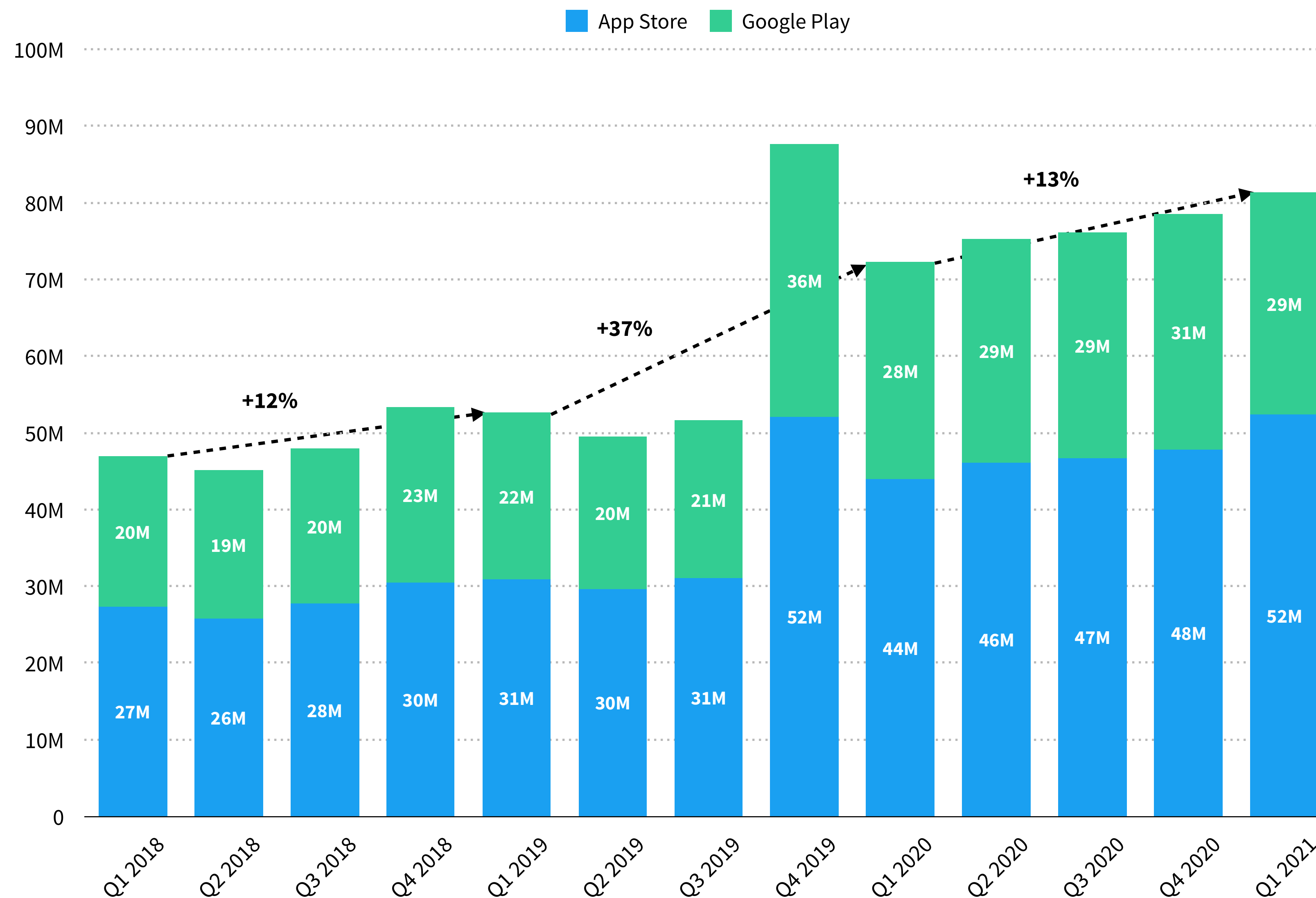
Market Overview:

United States

An Overview of Streaming Apps in the U.S.

U.S. Streaming Apps Surpassed 81 Million Installs in Q1 2021

U.S. quarterly downloads of top 30 streaming apps on the App Store and Google Play



Streaming apps experienced their best quarter in Q4 2019, with the top 30 surpassing 88 million downloads in the United States. The launch of Disney+ was the main contributor to this record growth.

Despite seeing a drop in 1Q20 following their record quarter, streaming app adoption climbed consistently quarter-over-quarter in 2020. Top streaming apps surpassed 81 million downloads in Q1 2021, soaring 13 percent year-over-year.








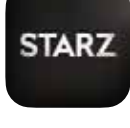

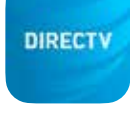
Note Regarding Downloads Estimates:

Download estimates are the aggregate downloads of the top 30 streaming apps in the U.S. in 2020.








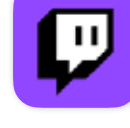

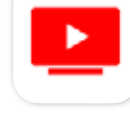
HBO Max Surpassed Competitors as the Most Downloaded Streaming App in 1Q21

Top streaming apps by U.S. downloads on the App Store and Google Play





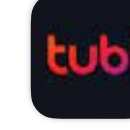





2018

1		Netflix Netflix
2		Hulu Hulu
3		Amazon Prime Video Amazon
4		Twitch Amazon
5		Tubi Fox Corporation
6		YouTube Kids Google
7		ESPN Disney
8		STARZ Lions Gate
9		YouTube TV Google
10		DIRECTV AT&T










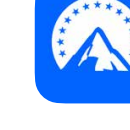
2019

1		Netflix Netflix	-
2		Disney+ Disney	NEW
3		Hulu Hulu	-1
4		Amazon Prime Video Amazon	-1
5		Tubi Fox Corporation	-
6		Pluto TV ViacomCBS	NEW
7		ESPN Disney	-
8		Twitch Amazon	-4
9		YouTube Kids Google	-3
10		YouTube TV Google	-1

2020

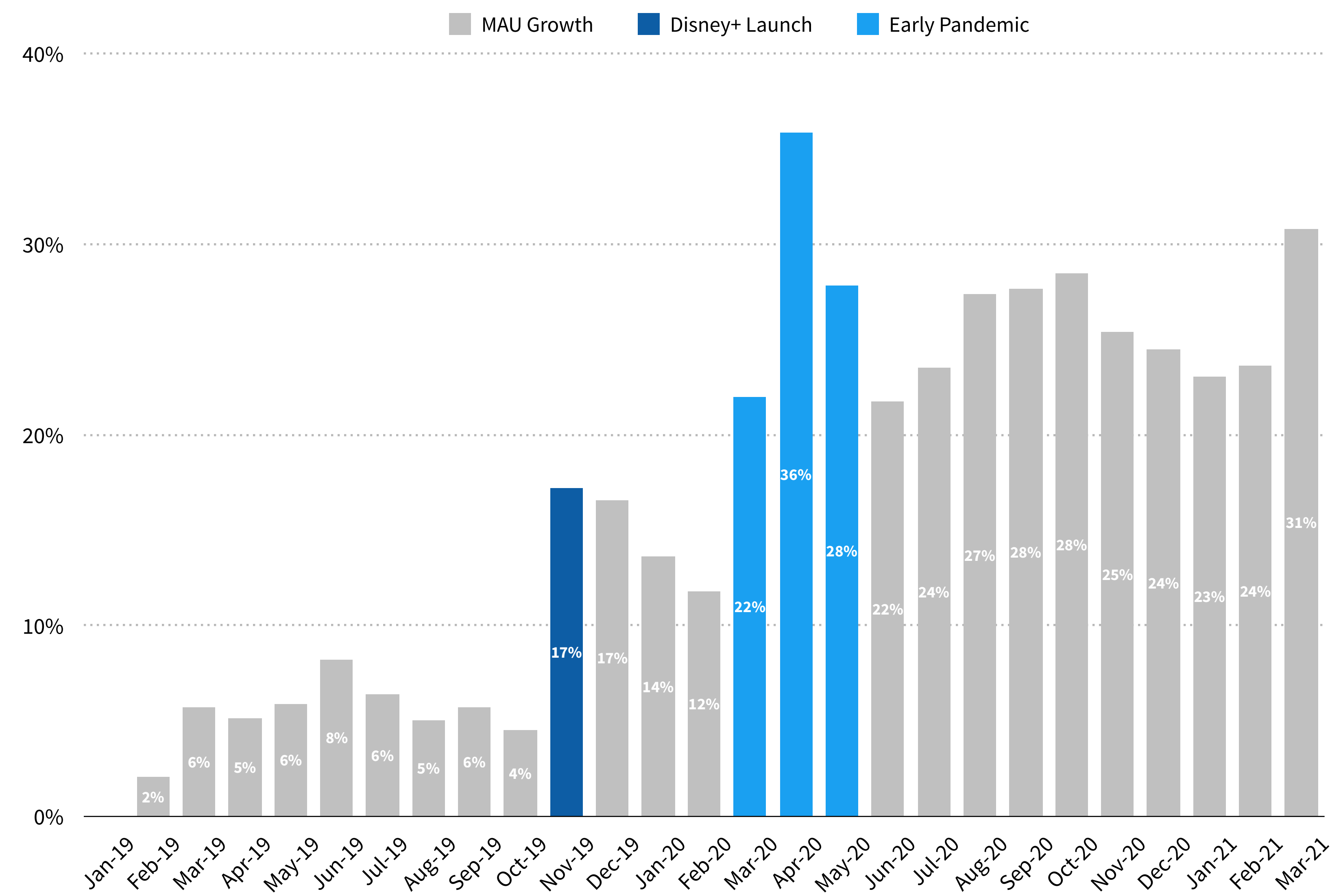
1		Netflix Netflix	-
2		Disney+ Disney	-
3		Hulu Hulu	-
4		Amazon Prime Video Amazon	-
5		Tubi Fox Corporation	-
6		HBO Max AT&T	NEW
7		Twitch Amazon	+1
8		Pluto TV ViacomCBS	-2
9		YouTube Kids Google	-
10		ESPN Disney	-3

1Q21

1		HBO Max AT&T	+5
2		Netflix Netflix	-1
3		Disney+ Disney	-1
4		Hulu Hulu	-1
5		Amazon Prime Video Amazon	-1
6		Discovery+ Discovery	NEW
7		Tubi Fox Corporation	-2
8		Twitch Amazon	-1
9		Peacock TV NBCUniversal	NEW
10		Paramount+ ViacomCBS	NEW

Streaming App MAU Grew by 36 Percent During COVID-19

Monthly active user (MAU) growth vs. January 2019 for top streaming apps



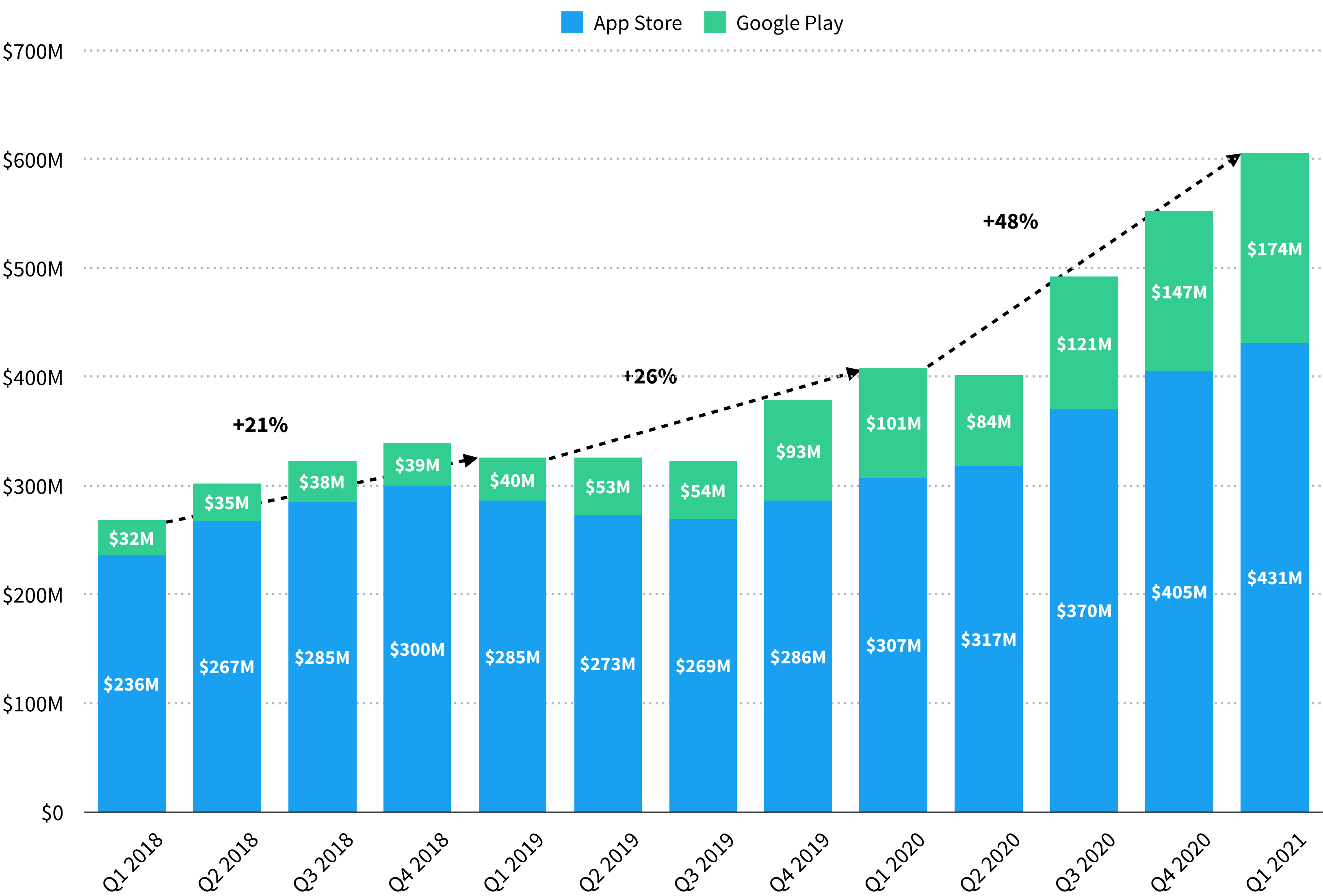
The top 10 streaming apps saw 36 percent growth in monthly active users during April 2020 compared to January 2019, amid the enforcement of stay-at-home orders across the United States. MAU has decreased from this peak but has remained above pre-pandemic levels into 2021.

The Disney+ launch in late 2019 was significant enough to boost MAU to 17 percent above the January 2019 total. However, the impact of the pandemic was even more pronounced than the launch of Disney+.

Note Regarding Monthly Active Users:
Monthly active users reflect activities at the app-user level and are aggregate for the top 10 streaming apps by U.S. downloads in 2020. MAU growth is compared to January 2019.

Streaming App Revenue Climbed 48 Percent in the Last Year

U.S. quarterly gross revenue of streaming apps on the App Store and Google Play



The top 30 grossing streaming apps reached \$605 million in consumer spending in Q1 2021, soaring 48 percent year-over-year as the services added users during stay-at-home orders.











App Store user spending made up more than 70 percent of streaming app revenue growth in 2020. Despite accounting for a smaller proportion of revenue, Google Play streaming app revenue share grew nearly five percentage points in Q1 2021 year-over-year, from 25 percent in 2020.

Note Regarding Revenue Estimates:
Revenue figures are gross revenue (including the cut taken by Apple or Google). Revenue estimates are the aggregate revenue of the top 30 streaming apps in the U.S. in 2020. Android app estimates represent revenue from the Google Play Store only.






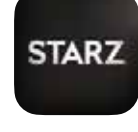


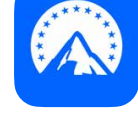

Disney+ Saw the Highest Revenue Among Streaming Apps Since Launch

Top streaming apps by U.S. revenue on the App Store and Google Play



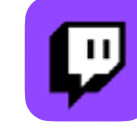



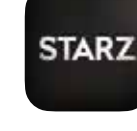

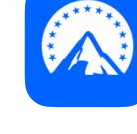
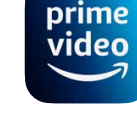
2018

1		Netflix Netflix
2		HBO Max AT&T
3		Hulu Hulu
4		YouTube TV Disney
5		STARZ Lions Gate
6		Paramount+ ViacomCBS
7		MLB MLB
8		SHOWTIME ViacomCBS
9		Crunchyroll AT&T
10		Twitch Amazon








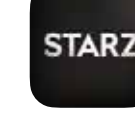
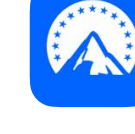
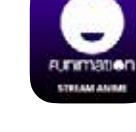
2019

1		Netflix Netflix	-
2		HBO Max AT&T	-
3		Hulu Hulu	-
4		ESPN Disney	NEW
5		Disney+ Disney	NEW
6		STARZ Lions Gate	-1
7		YouTube TV Disney	-3
8		Twitch Amazon	+2
9		Paramount+ ViacomCBS	-3
10		DAZN DAZN	NEW

2020

1		Disney+ Disney	+4
2		Netflix Netflix	-1
3		Twitch Amazon	+5
4		HBO Max AT&T	-2
5		Hulu Hulu	-2
6		ESPN Disney	-2
7		STARZ Lions Gate	-1
8		Crunchyroll AT&T	NEW
9		Paramount+ ViacomCBS	-
10		Amazon Prime Video Amazon	NEW

1Q21

1		Disney+ Disney	-
2		Twitch Amazon	+1
3		HBO Max AT&T	+1
4		ESPN Disney	+2
5		Hulu Hulu	-
6		Netflix Netflix	-4
7		Crunchyroll AT&T	+1
8		STARZ Lions Gate	-1
9		Paramount+ ViacomCBS	-
10		Funimation Funimation	NEW

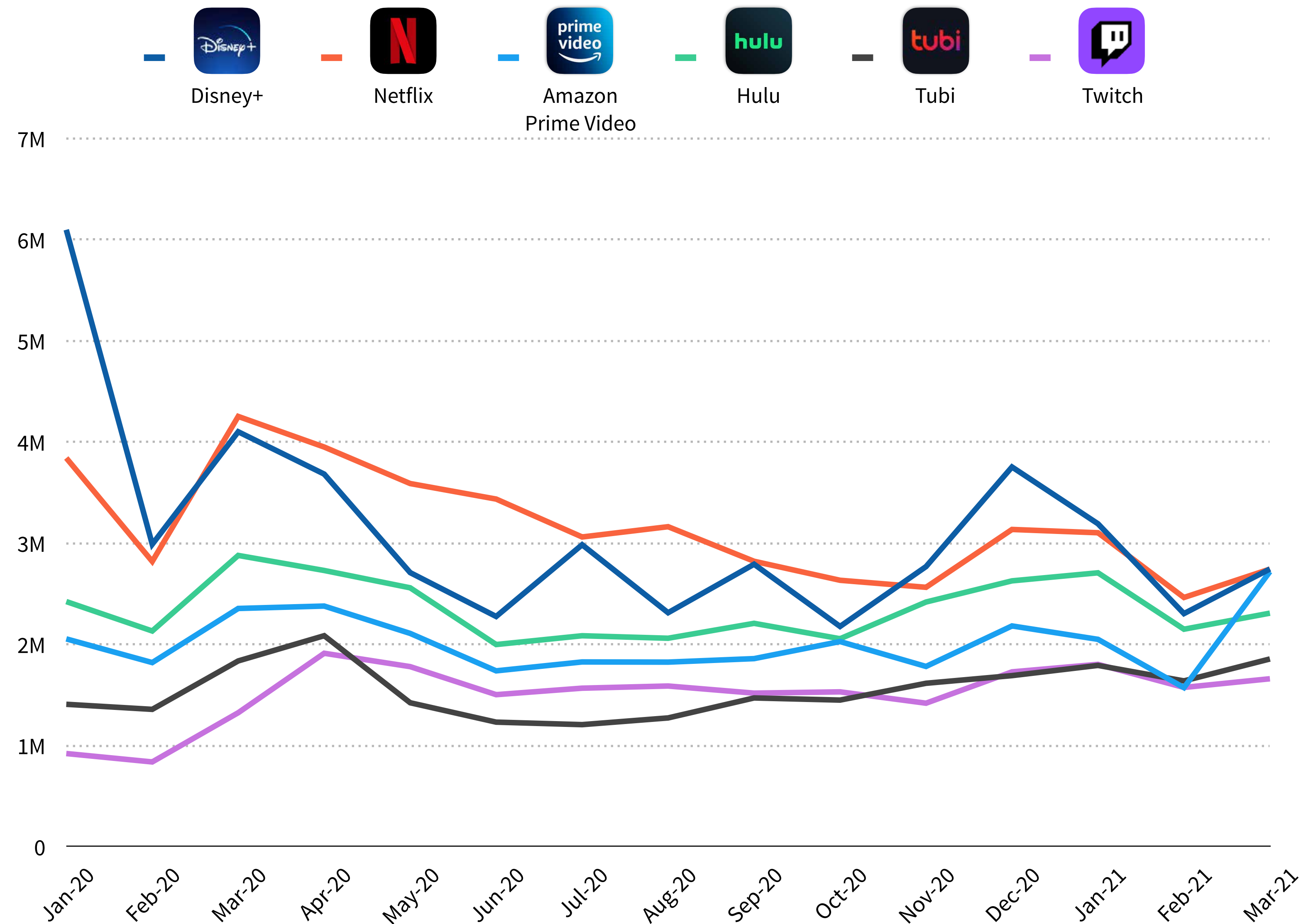
Streaming App Trends:

United States

Trends of Streaming Apps in the U.S.

Disney+ Downloads Spiked in the First Month of Launch

Monthly U.S. downloads of top streaming apps

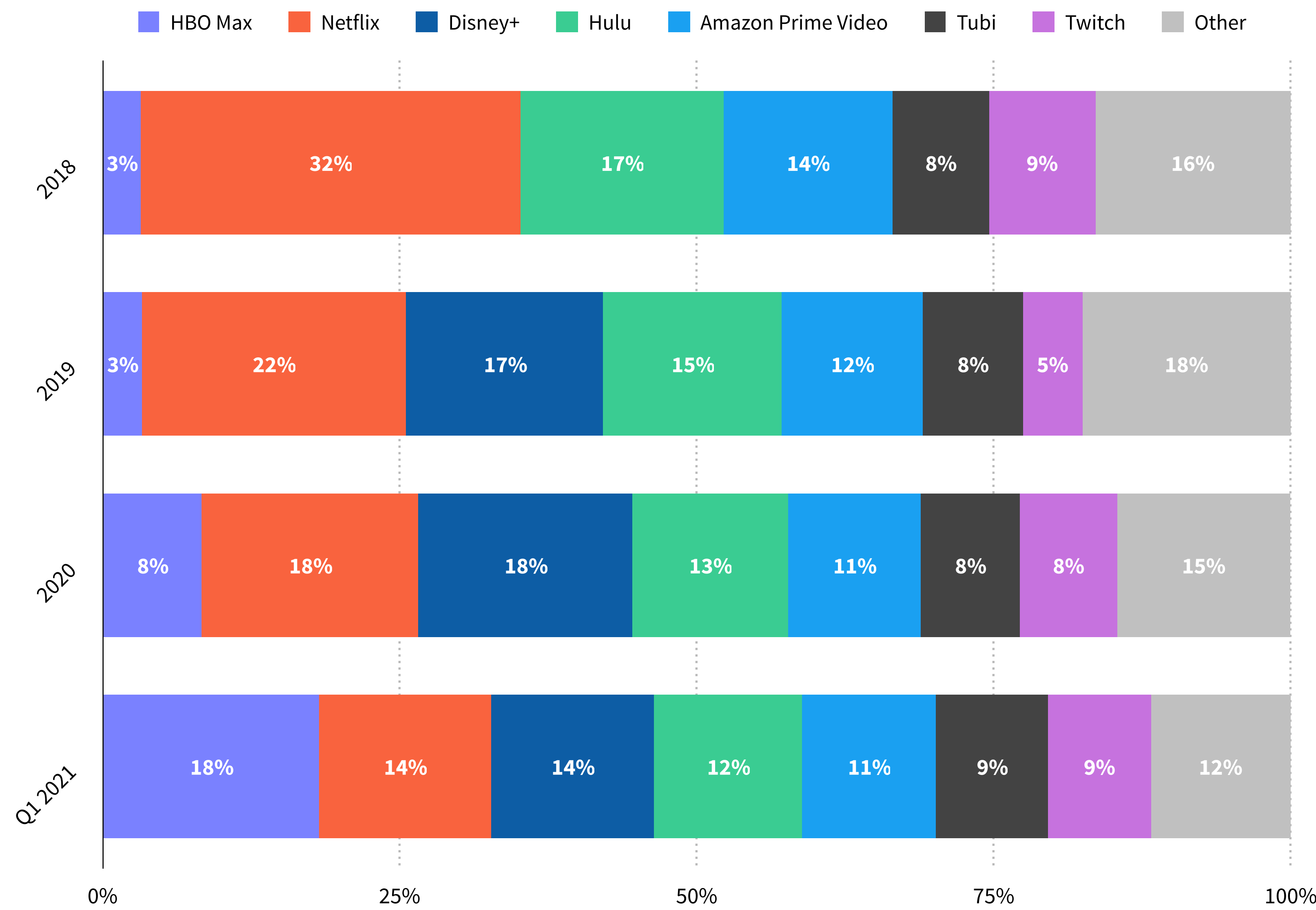


Netflix and Disney+ surpassed 4 million downloads in March 2020, immediately after the outbreak of COVID-19. Top streaming services saw a collective boost in adoption in the first few months into the pandemic. The adoption boost lasted through June 2020 when COVID-19 restrictions eased in multiple states.

Disney+ saw another adoption peak in December 2020, surpassing 3.7 million downloads during a month of hot releases and holiday movies. Since its app launch in November 2019, Disney+ has been experiencing download surges during the releases of top shows and movies. This was especially true amid the closure of public movie theaters and the app enabled subscribers to stream new Disney movies in 2020 from mobile devices.

HBO Max Accounted for the Highest Market Share in 1Q21

Proportion of U.S. installs among top 10 streaming apps



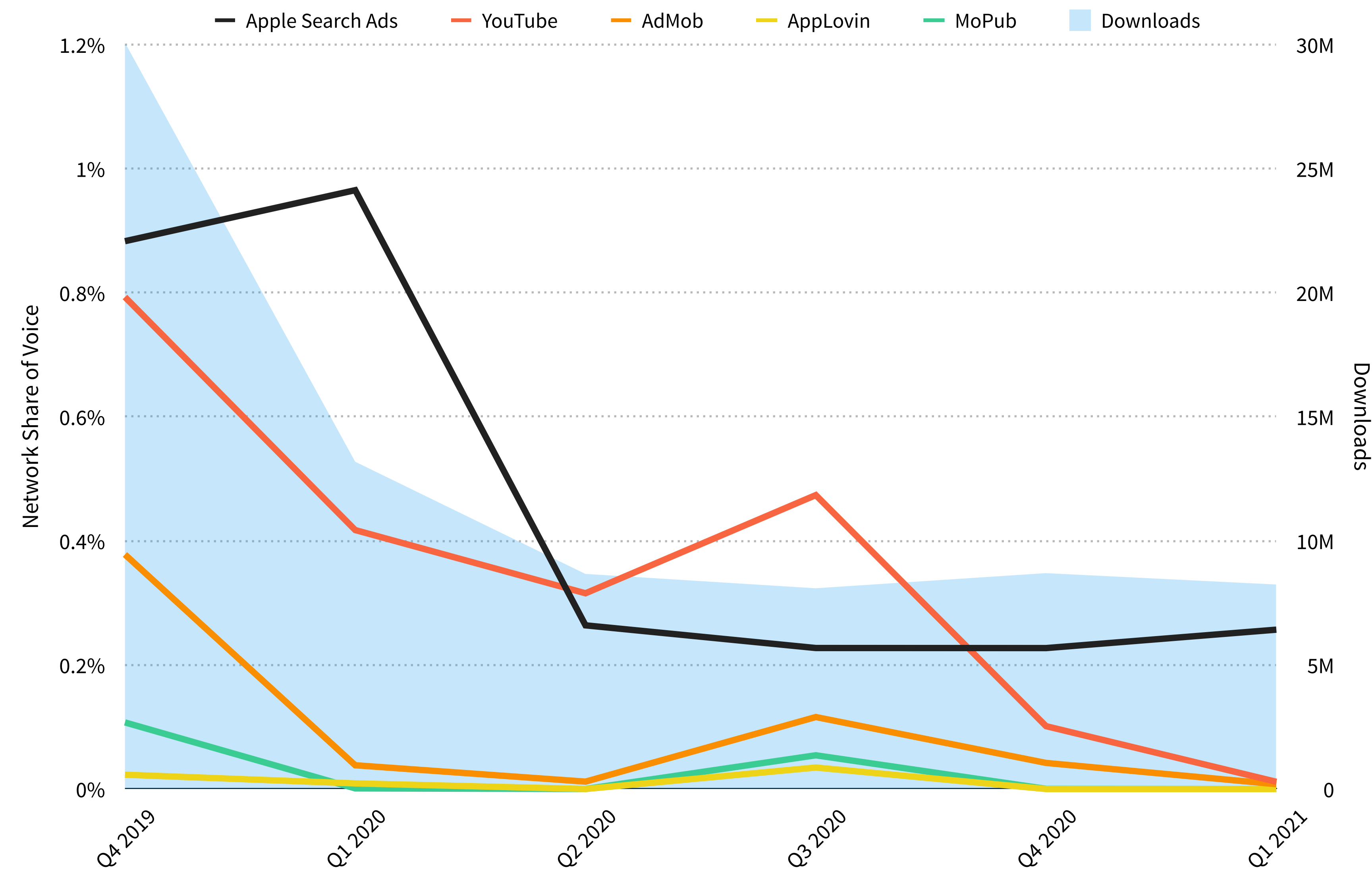
Netflix and Disney+ accounted for 30 percent of the market share among the top 10 streaming apps combined. Despite operating in a competitive space, the two streaming services led the market by download in 2020.

Among the streaming app competitors, HBO Max also experienced fast-paced growth. HBO Max market share grew by 10 percentage points from 2020 to 1Q21, accounting for 18 percent of the download share among top U.S. streaming apps.

Note:
Market share is calculated among the top 10 streaming apps by U.S. downloads in 2020.

Disney+ Found Success Through Top Ad Networks

Disney+’s share of voice on top mobile ad networks by quarter compared to downloads

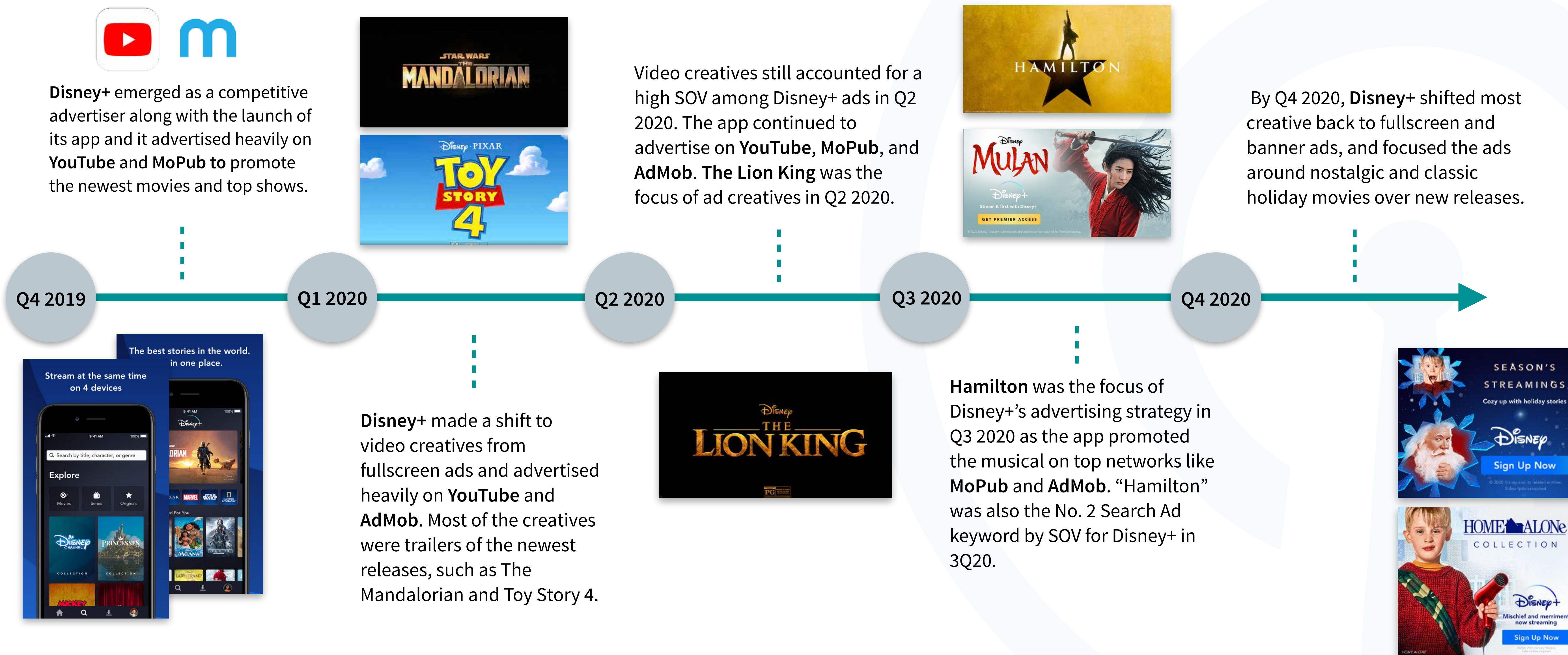


Disney+ used ad campaigns to boost its launch, with especially pronounced advertising during its first quarter in Q4 2019. The app has seen positive results from its advertising via Apple Search Ads and YouTube, where its share of voice was the highest.

Disney+’s share of voice on Apple Search Ads was highest in the first quarter of 2020, where it reached 1 percent SOV among all advertisers in the quarter.

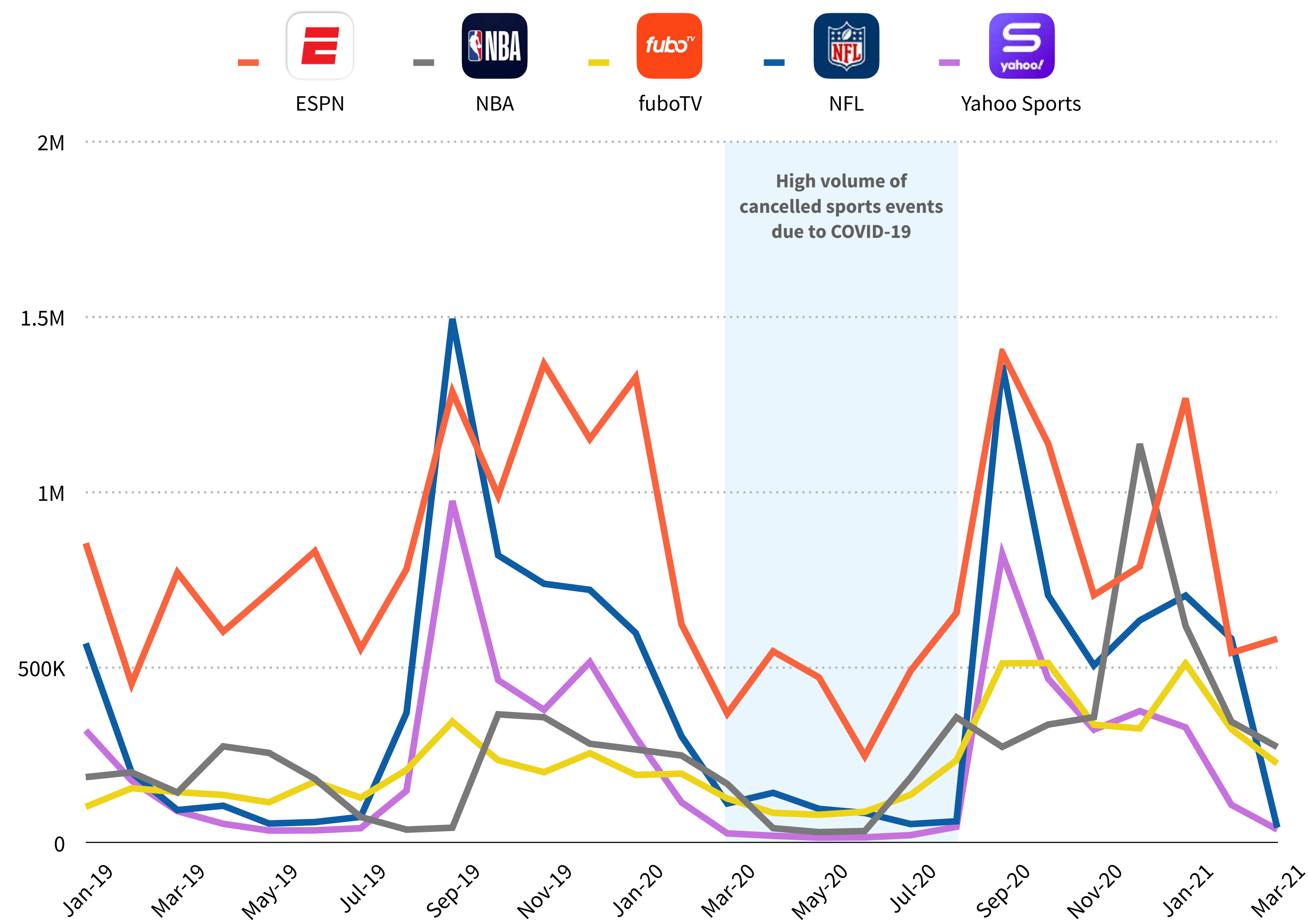
Disney+ Capitalized by Advertising for Its New Content

Creative and ASO trends of Disney+ since Q4 2019



Sports Streaming Adoption Rebounded After a Low Period

Monthly U.S. downloads of top sports streaming apps

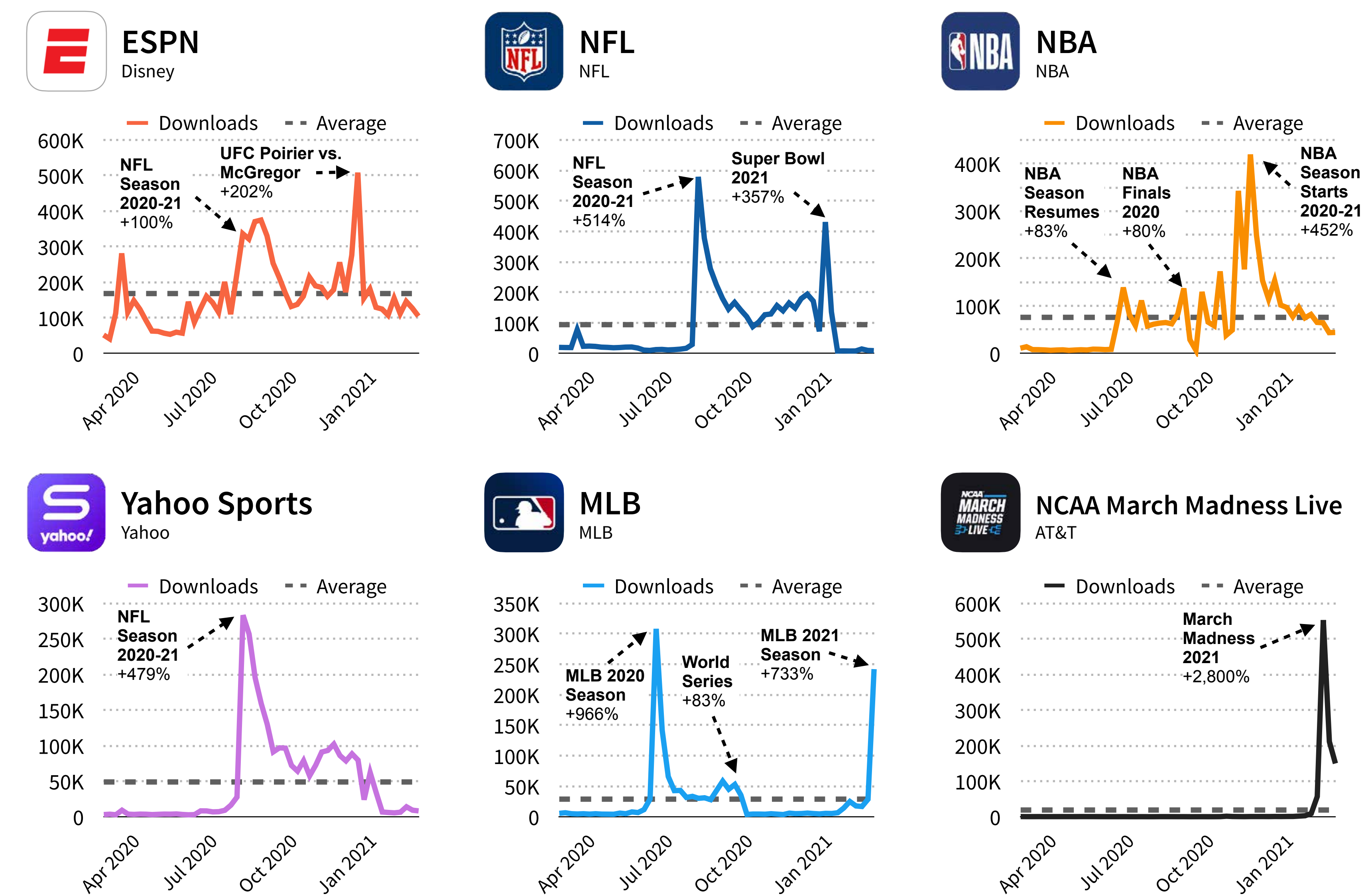


Sports streaming experienced a quiet period for downloads between March and July 2020 when the U.S. entered lockdowns and cancelled various sporting events. Adoption took off and returned to pre-pandemic levels in September 2020, as ESPN reached 1.4 million downloads, surpassing January 2020’s number.

Sports streaming app adoption is seasonal and largely driven by popular sporting events. NFL app installs surpassed 1.3 million downloads in September 2020 following the start of the 2020 NFL season.

NFL Season Heralded the Resurgence of Sports Streaming

U.S. weekly downloads of sports streaming apps, Q2 2020 - Q1 2021



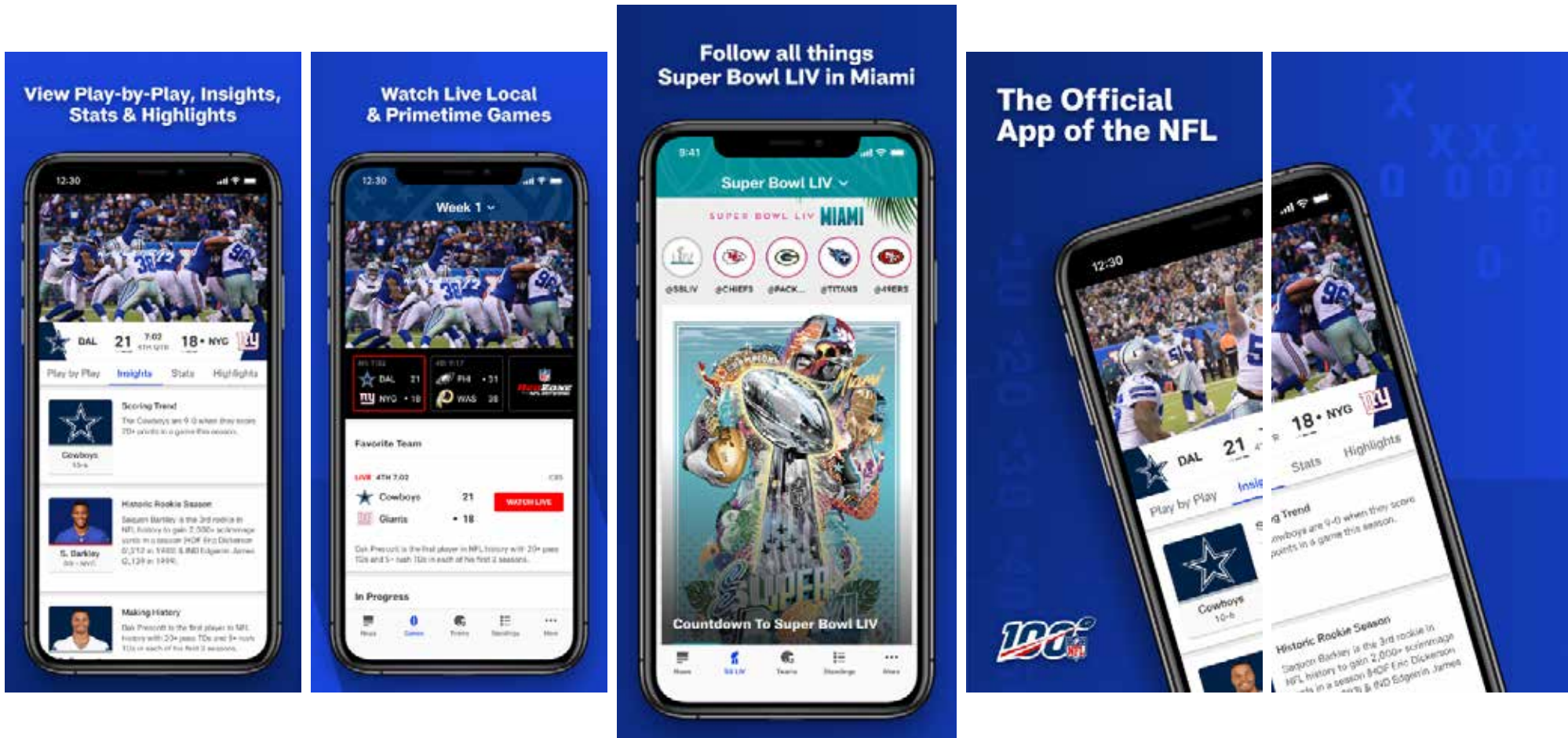
Football events drove a prominent boost in streaming app installs such as ESPN and NFL. ESPN weekly downloads were up 100 percent vs. their weekly average at the start of the NFL season, and the NFL and Yahoo Sports apps saw a roughly 500 percent boost.

Sports apps tended to see the largest adoption gains at the start of a new season, although the postseason events also increased adoption. The Super Bowl in particular helped propel the NFL app to more than 70 percent of its download peak seen at the start of the 2020-21 season.

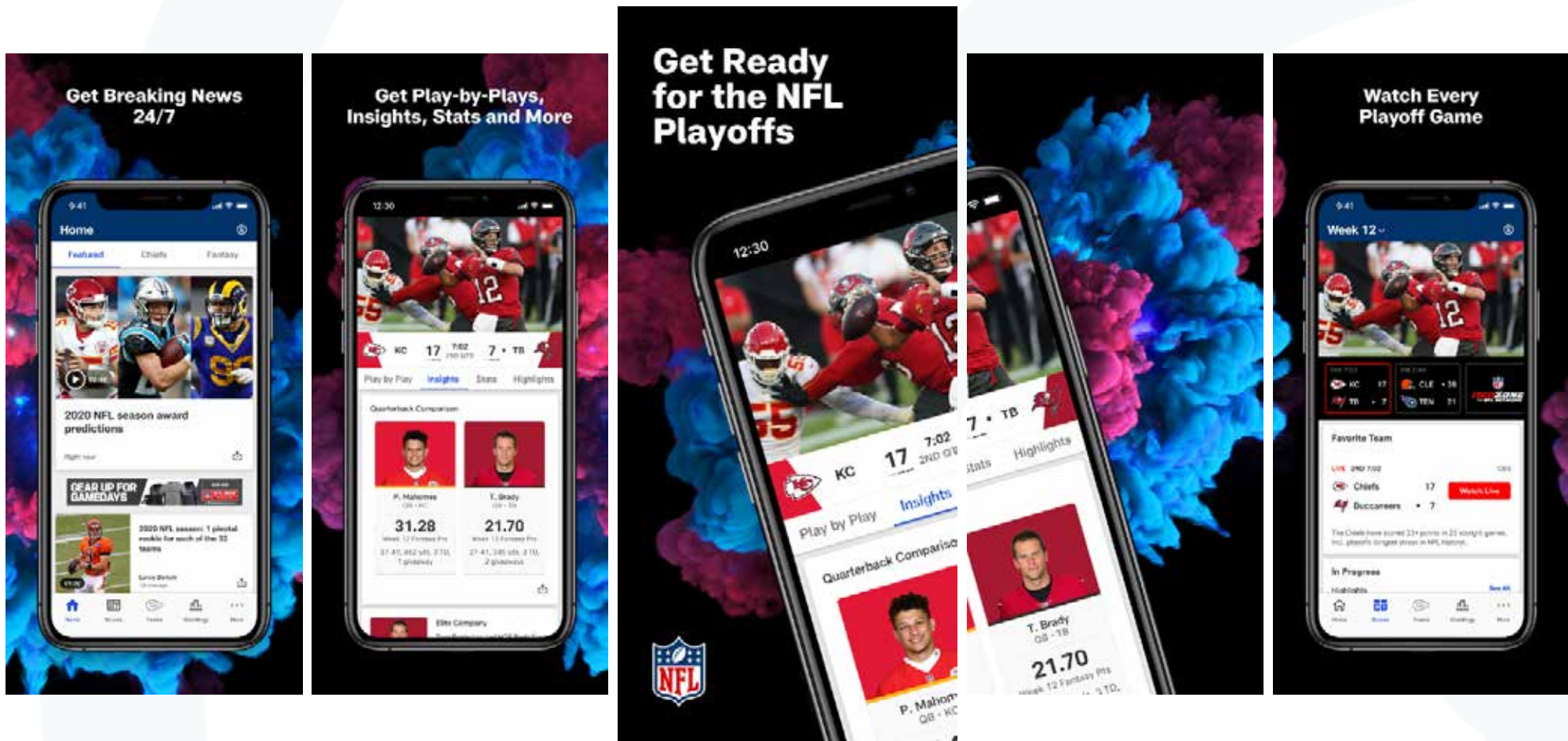
NFL Utilized Screenshot Updates to Boost Installs Before Major Events


NFL’s screenshot updates before major football events in 2020

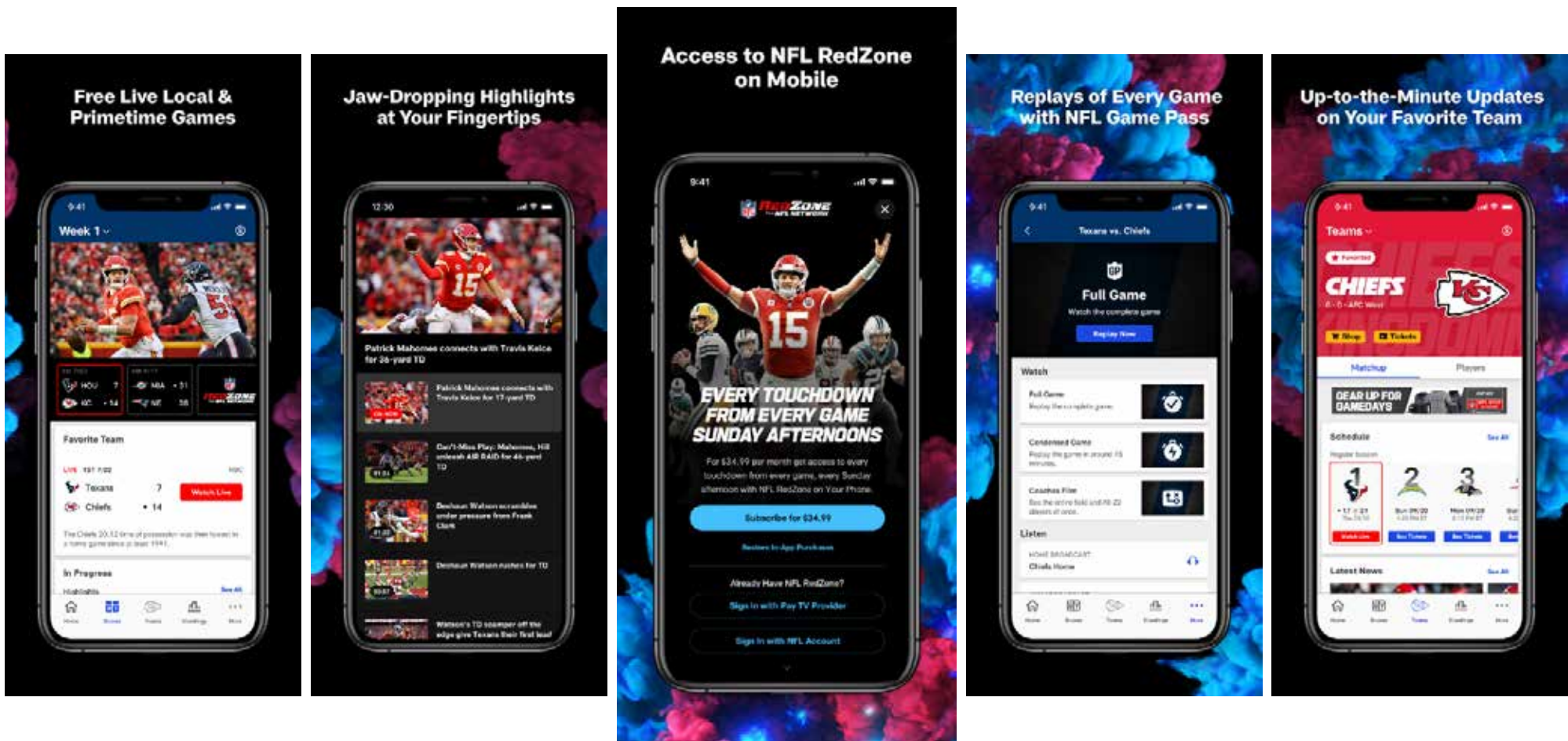
 Jan 21, 2020: NFL promoting Super Bowl two weeks in advance



 Dec 15, 2020: Updated screenshots highlighting “Get Ready for the NFL Playoffs”



 Sep 7, 2020: NFL changed its assets at the start of the new season



The NFL successfully utilized screenshot updates to promote its app before major football events in 2020. When the NFL and Fantasy Football season returned in September 2020, the app released a screenshot update three days prior to the first day of the season, highlighting “NFL RedZone on Mobile”. The NFL RedZone Pass lets consumers stream seven hours of football on their mobile devices after purchase.

Streaming Monetization:

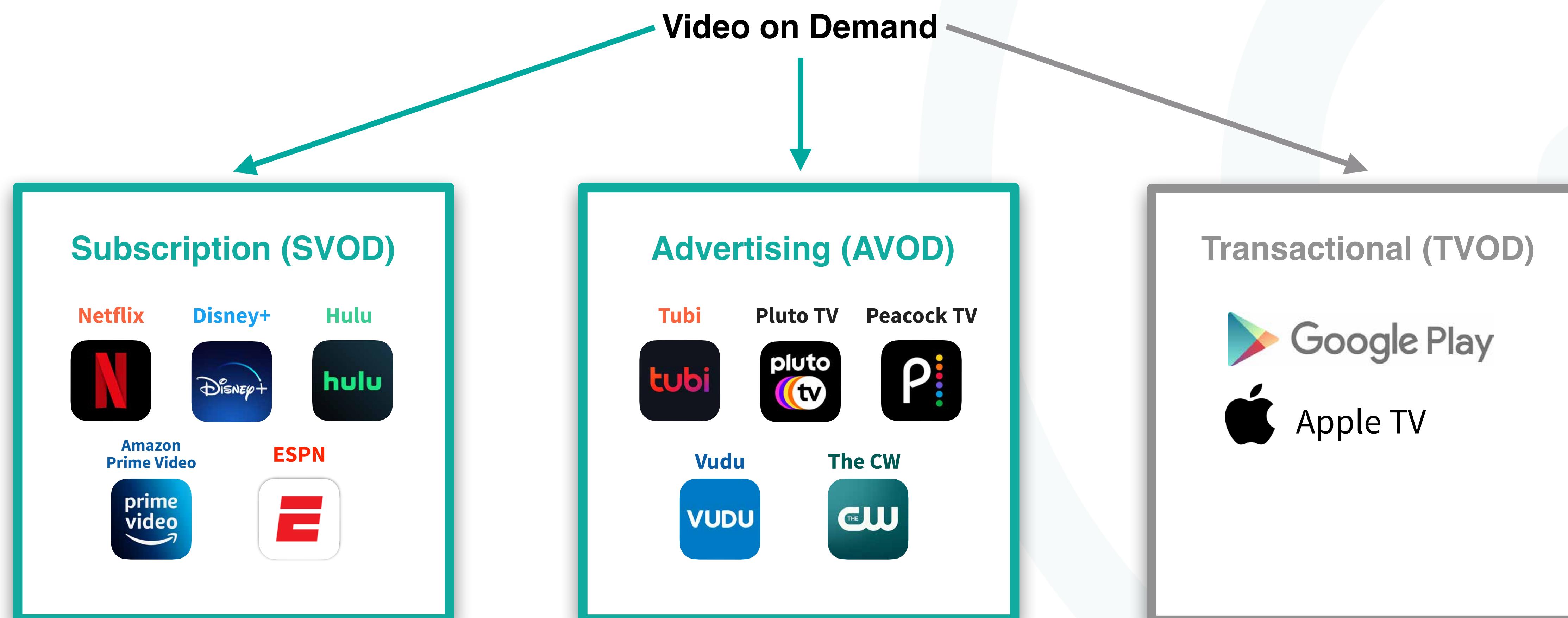
United States

Monetization Models of Streaming Apps

Monetization Trends:

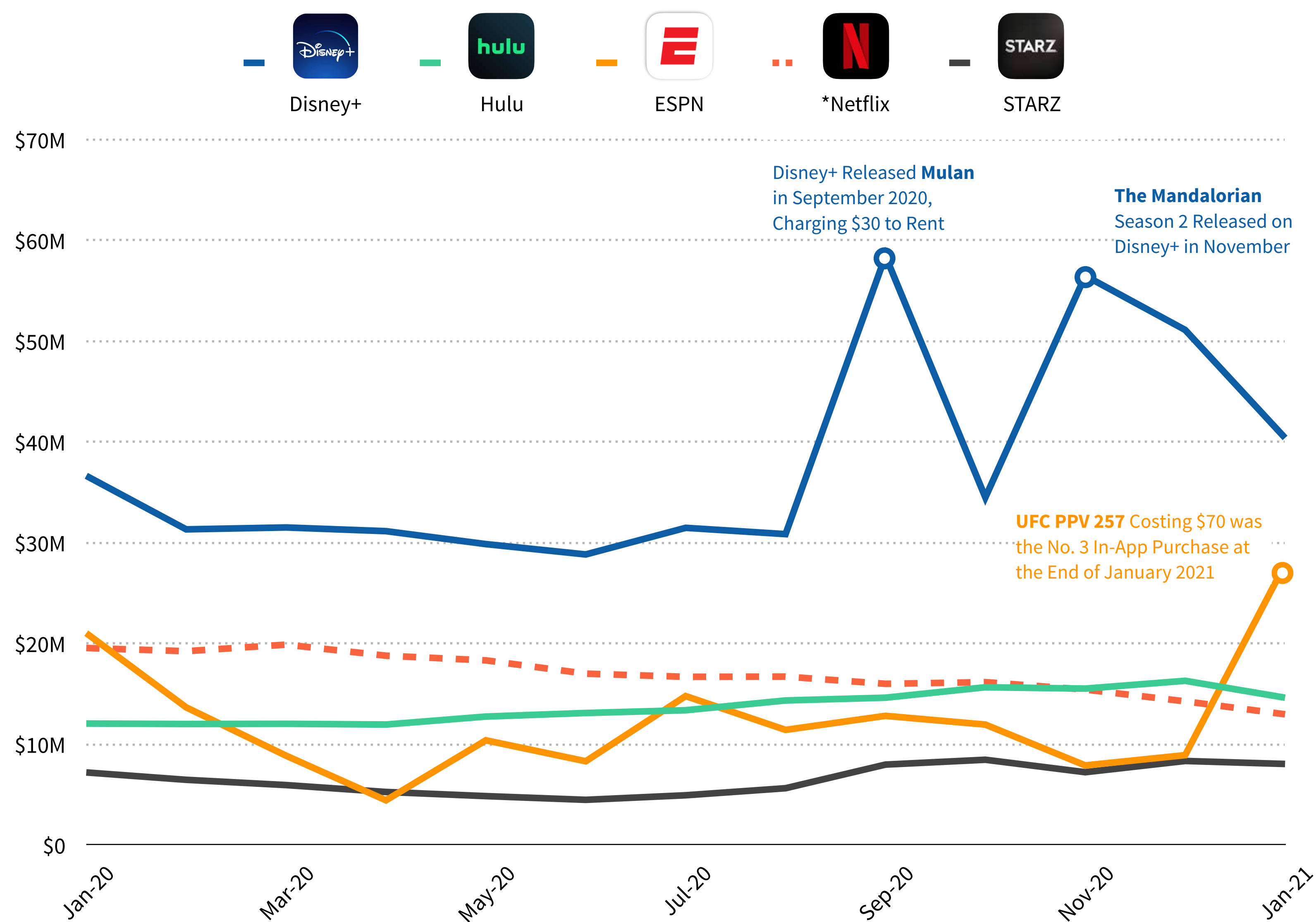
Streaming Monetization Strategies

Streaming services have three general monetization models: Subscription Video on Demand (SVOD), Advertising Video on Demand (AVOD), and Transactional Video on Demand (TVOD). Many streaming services use more than one monetization model. For instance, although Hulu is a SVOD service that only enables streaming for subscribers, it also monetizes on advertisements for the subscription packages with a lower fee. Peacock TV also contains subscriptions for ad-free viewing experience but lets users stream most shows free of charge. We will be focusing our analyses on SVOD and AVOD in this section.



Streaming App Revenue Driven by Popular Events

Monthly U.S. gross revenue of top grossing SVOD apps



* Netflix stopped offering the in-app subscription option for new customers on iOS in 2018

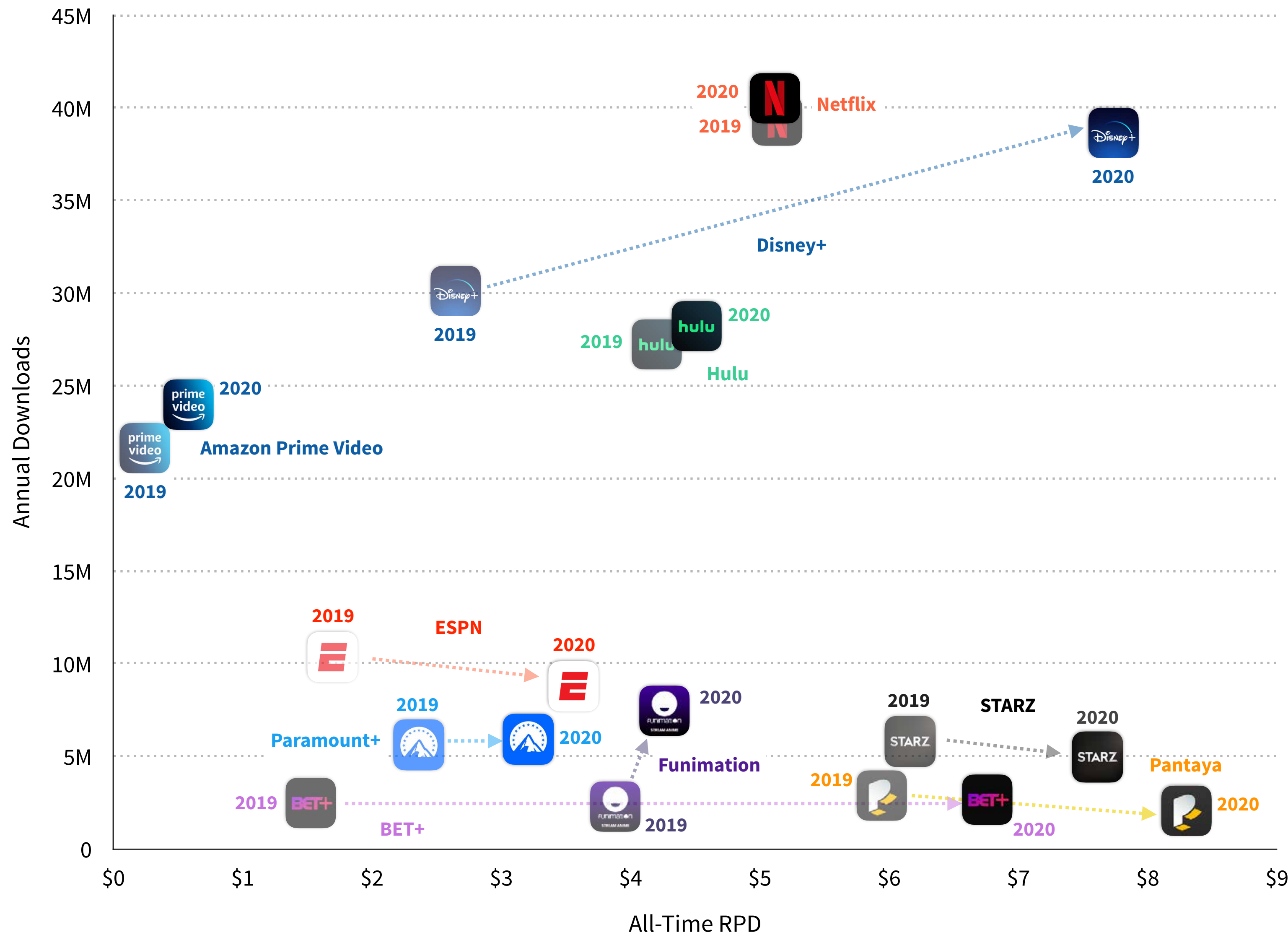
Disney+ gained almost \$60 million in consumer spend during September 2020 following the release of the live action movie **Mulan** the same month. The app enabled users to rent the movie for an additional charge of \$30 upon release.

ESPN revenue spiked at the end of January 2021 along with the demand for access to **UFC PPV 257** (Poirier vs. McGregor). For an additional charge of \$70, ESPN subscribers were able to watch a highly anticipated UFC fight.

Note Regarding Revenue Estimates:
Revenue figures are gross revenue (including the cut taken by Apple or Google). Android app estimates represent revenue from the Google Play Store only.

Streaming Apps Saw Upticks in RPD During COVID-19

All-time revenue per download (RPD) vs. downloads by year (2019 vs. 2020)

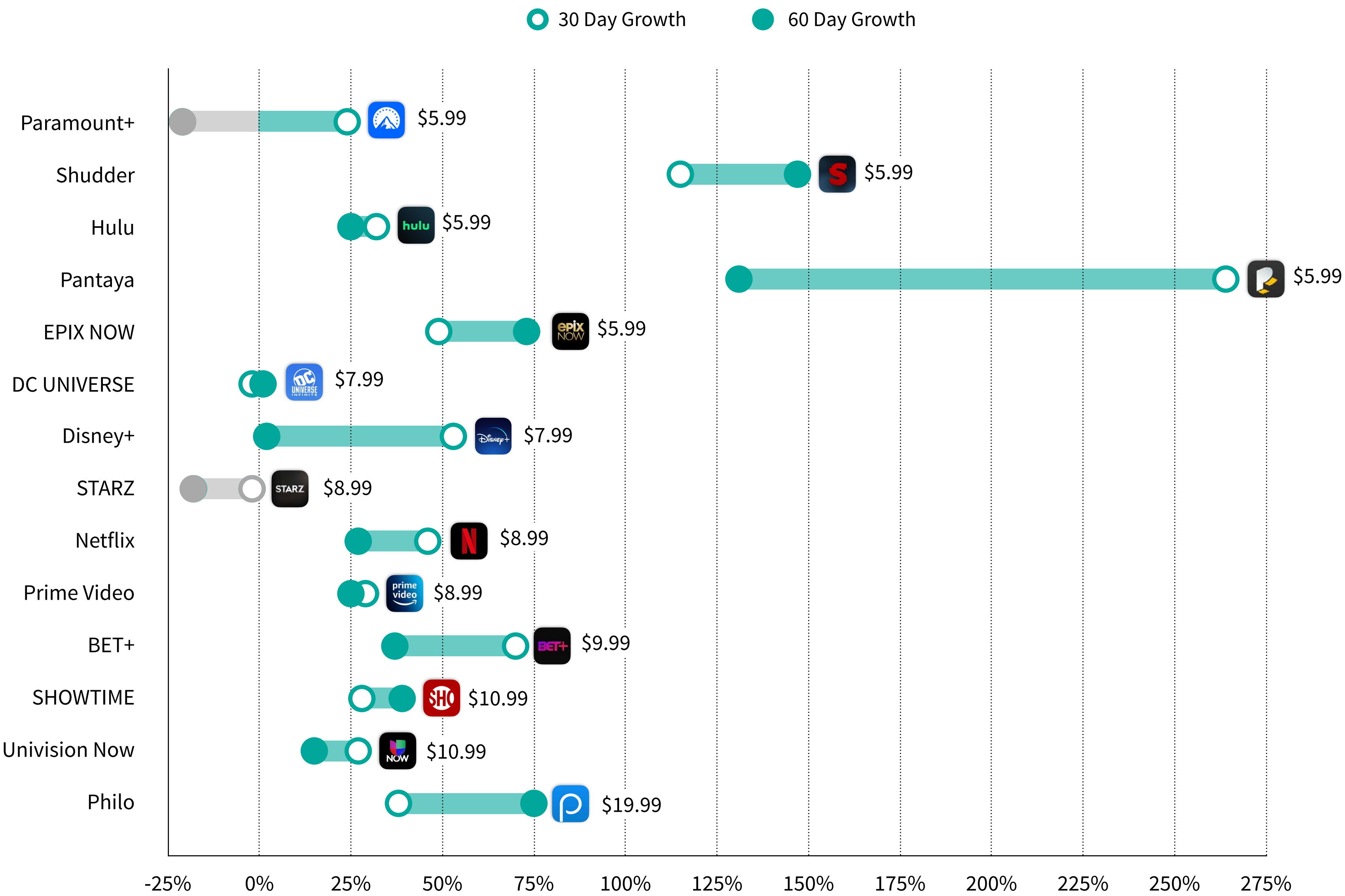


Streaming apps saw increases in all-time RPD in 2020, suggesting consumers spent more on streaming services during the COVID-19 pandemic than normal. **Disney saw the biggest jump in RPD in 2020, from \$2.65 in the last quarter of 2019 to \$7.74 in 2020.** Disney+ entered the market in late 2019 and made newly released movies available in its app.

Despite a drop in downloads due to the cancellation of sporting events in 2020, ESPN managed to up its all-time RPD from the previous year by \$1.86 in 2020. The sports streaming service successfully rebounded and users were more willing to spend after a quiet period for sports fans.

Smaller Apps Saw Highest Growth During COVID-19

SVOD download growth following the outbreak and the subscription cost (lowest) by app



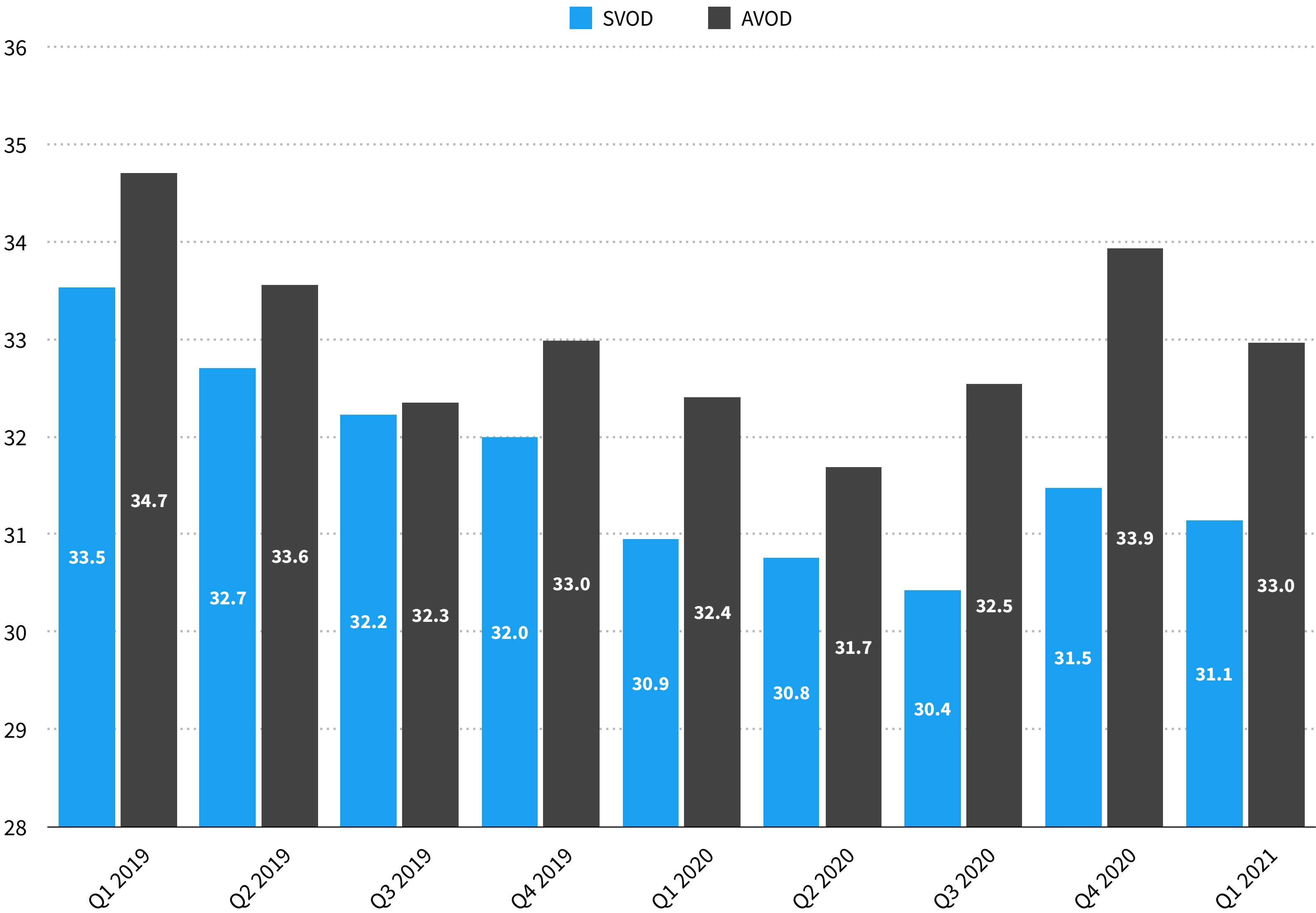
Most SVOD apps saw an immediate spike in adoption growth in the 30 days following the COVID-19 outbreak. **Netflix adoption spiked by nearly 50 percent in the 30 days following the outbreak and was able to maintain above 25 percent growth over the 60-day period, compared to pre-pandemic numbers.**

Hulu adoption growth hovered around 25 percent in the 30 and 60 days following the COVID-19 outbreak. Smaller apps with lower subscription costs, such as Shudder and Pantaya, witnessed tremendous growth during COVID-19 and saw their downloads double compared the the first two months of the year.

Note Regarding Growth:
Growth is calculated by comparing the download in the 30 days following the outbreak to the 30 days prior, and 60-day download following the outbreak to the 60 days prior.

AVOD Apps are Popular Among More Mature Users

Average age of top SVOD apps compared to that of AVOD apps by quarter



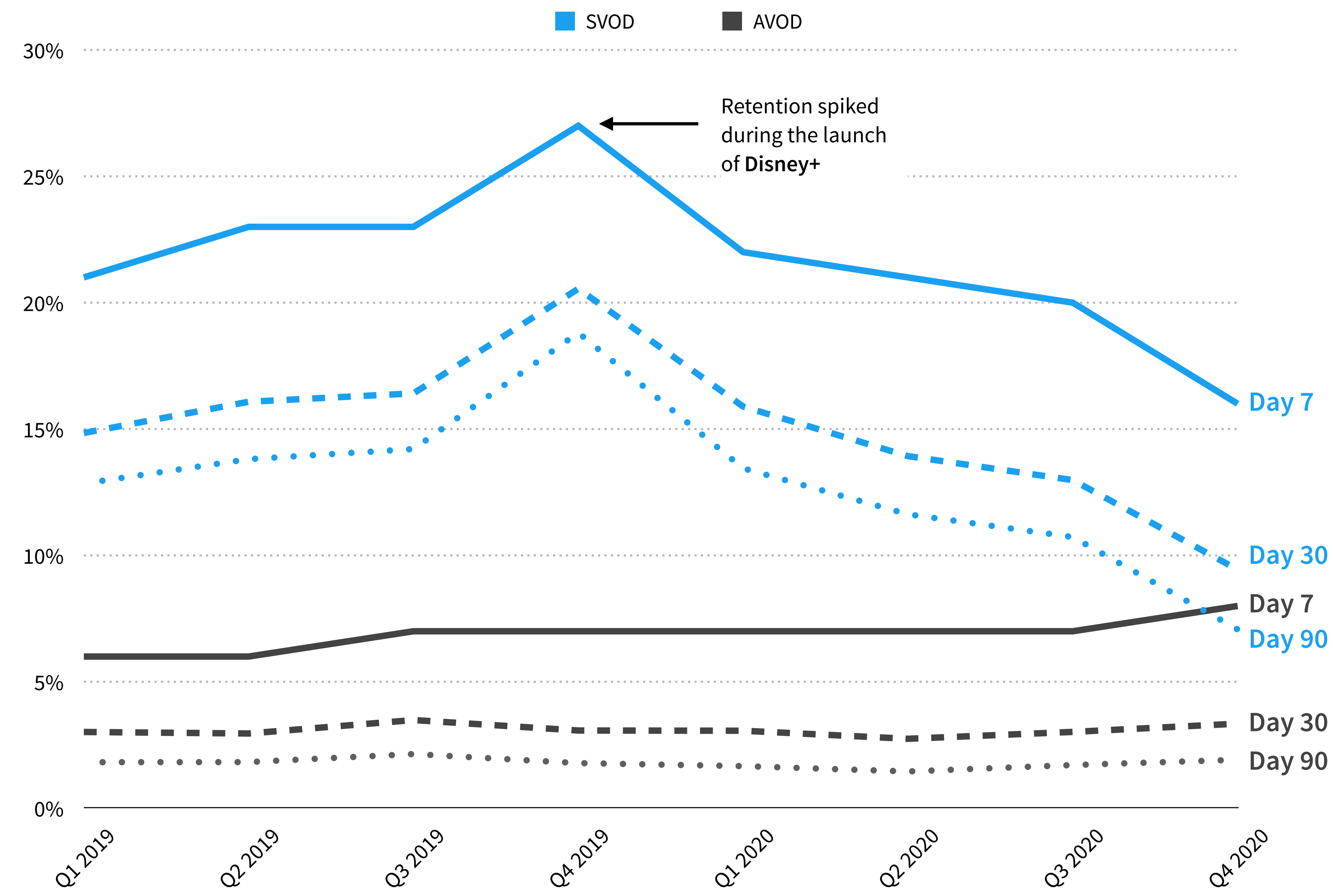
Streaming apps gained younger users during stay-at-home orders as both SVOD and AVOD apps saw a dip in average user age in Q2 2020. **SVOD user age averaged around 30.8 in Q2 2020 and AVOD apps averaged at 31.7 in the same quarter.**

AVOD apps saw higher average user age than SVOD apps in 2020. **AVOD users are older than SVOD users by 1.3 years on average (in 2019 and 2020), suggesting that AVOD is finding more success among mature audience and should capitalize on the greater demand from the age group.**

Note Regarding Average Age:
Average age estimates are weighted average of user age among the top 6 SVOD and AVOD apps in 2020.

Subscription Video on Demand Saw Higher Retention

Day 7, 30, and 90 retention rates of the top SVOD and AVOD apps



SVOD consistently saw higher retention rates than AVOD apps in the study period, as SVOD app 7-day retention stayed above 20 percent from Q1 2019 to Q3 2020. This can come as no surprise as subscriptions already target consumers who prefer the continuous use of the service over a one-time streaming experience.

Despite having a lower retention rate, AVOD apps saw a slight increase in day 7 retention over time and reached 8 percent in Q4 2020. AVOD apps such as Viki enabled users to stream shows of interest at no charge. While the app has a growing user base of international drama fans, it also attracts many one-time users who are looking to stream a particular program.

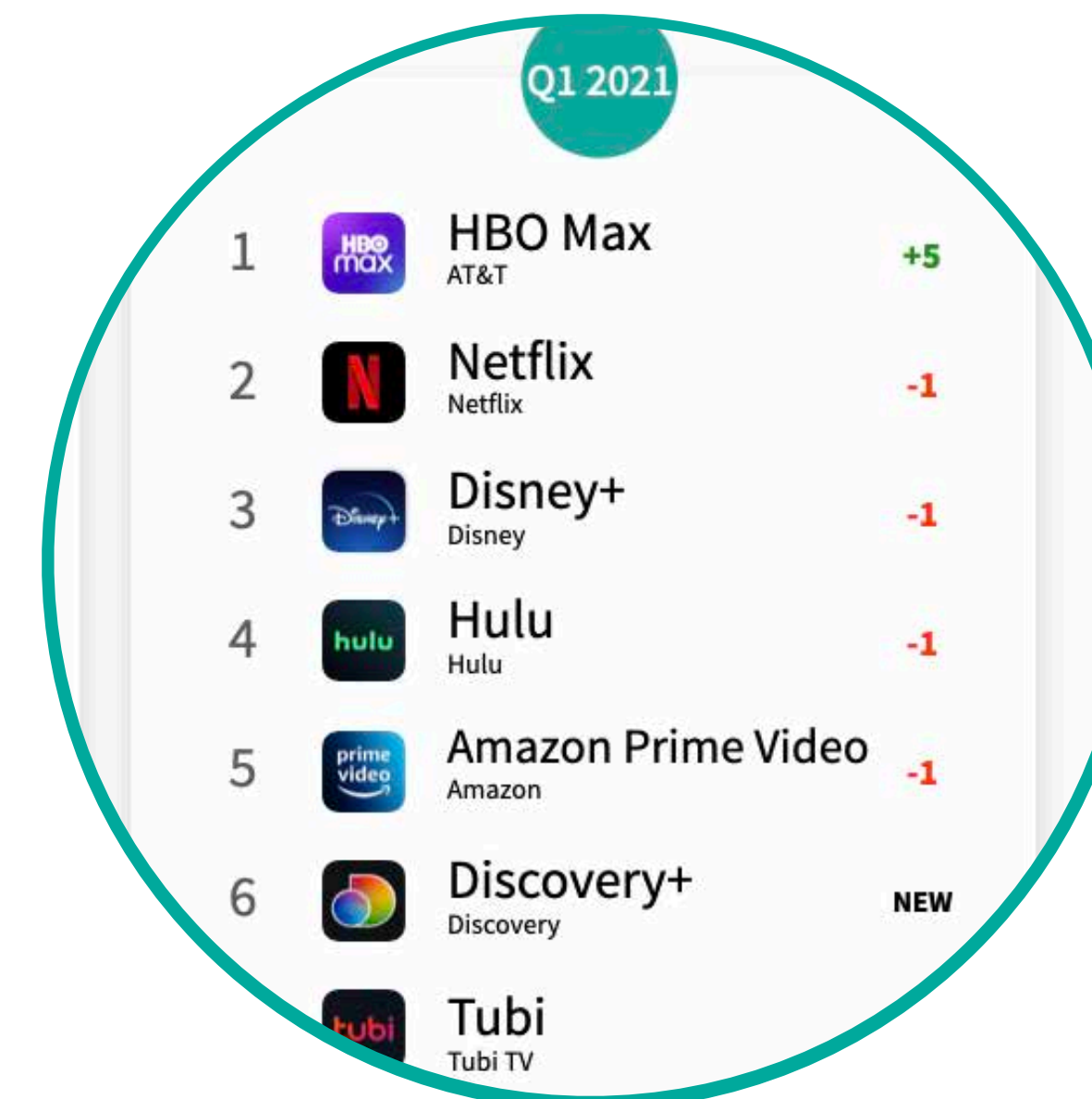
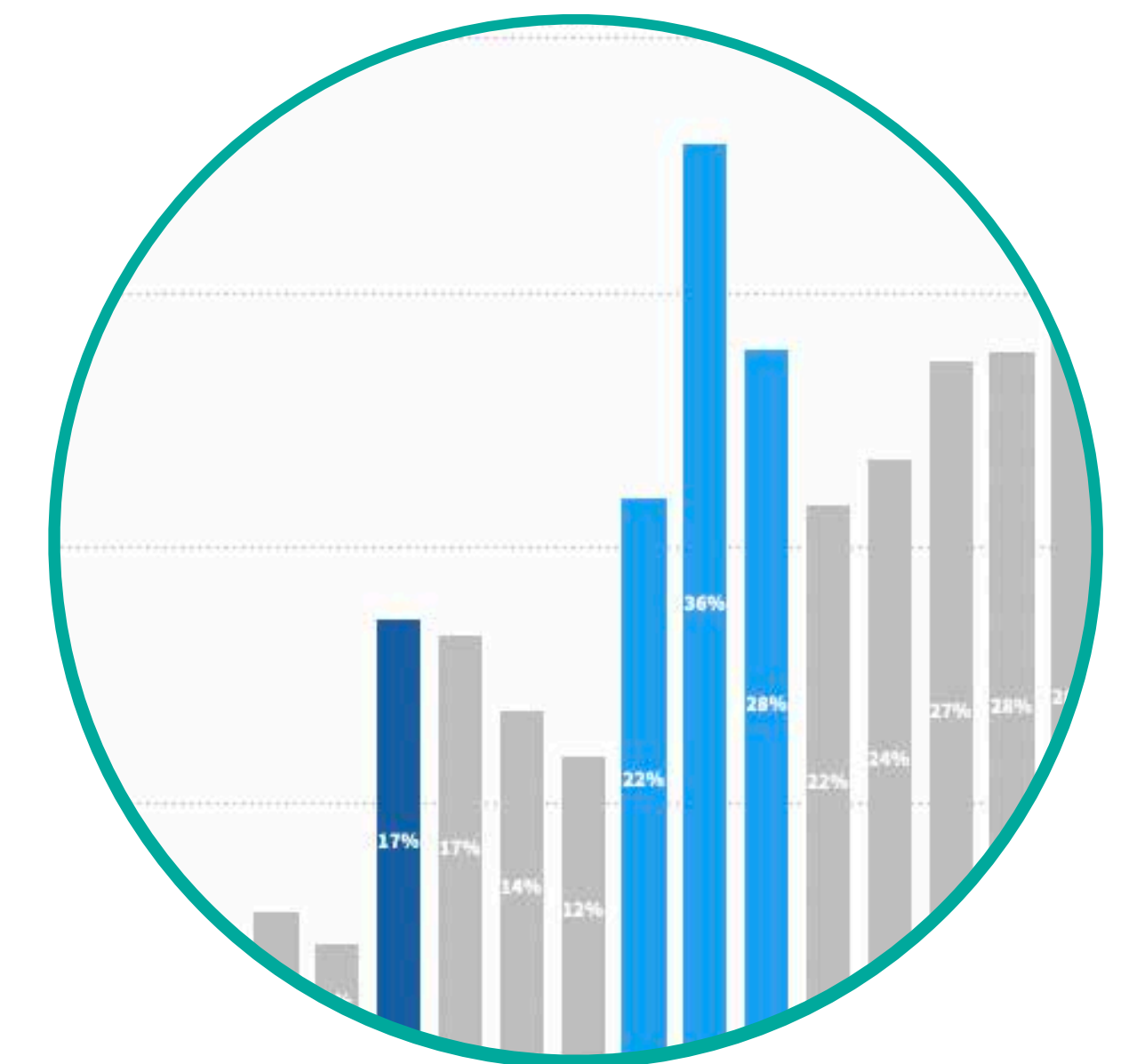
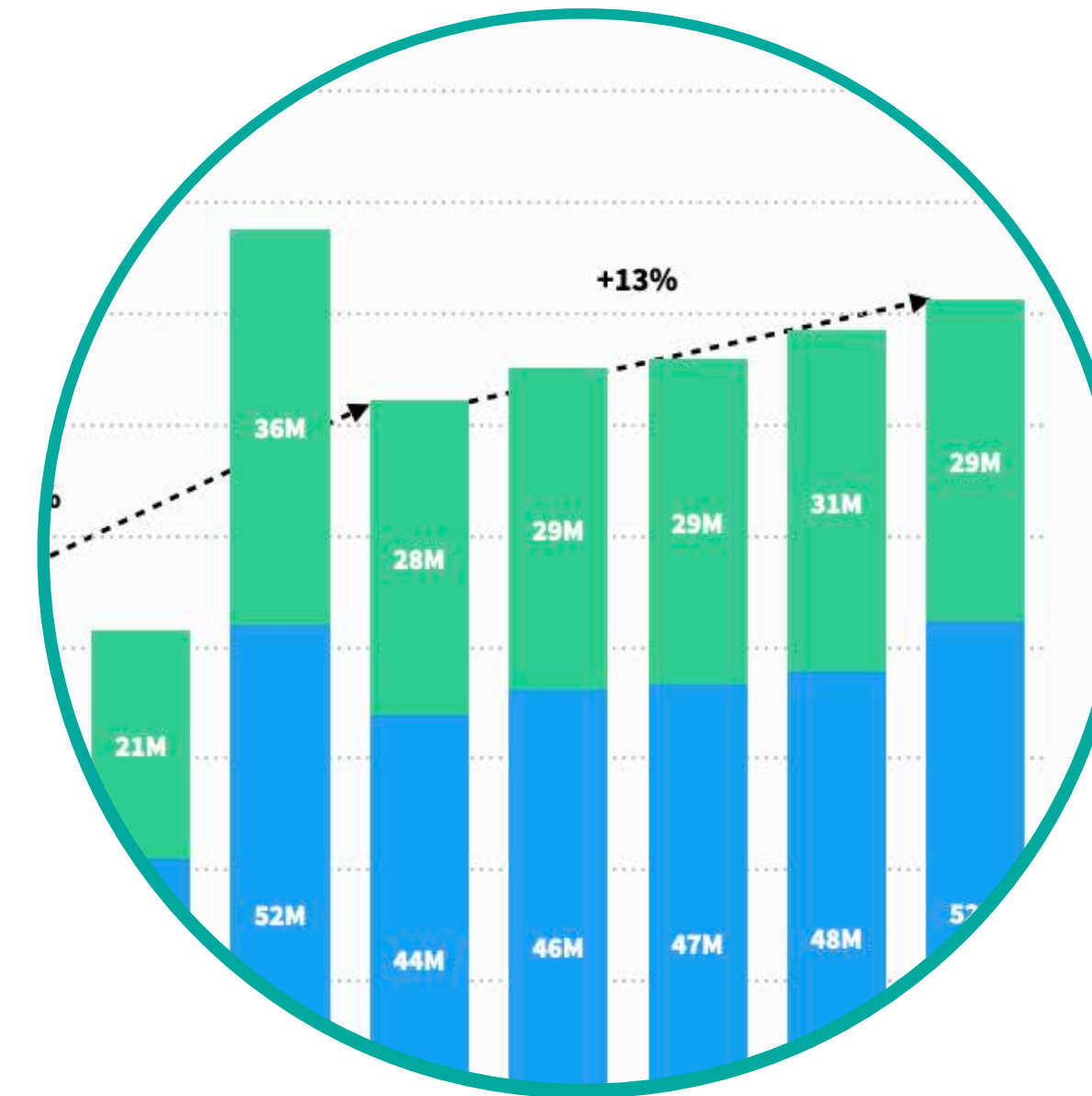
Conclusion

Key Takeaways from the Report

Conclusion

1. U.S. mobile streaming app adoption has climbed consistently since the beginning of the COVID-19 outbreak, with the top 30 apps surpassing 81 million installs in the first quarter of 2021.

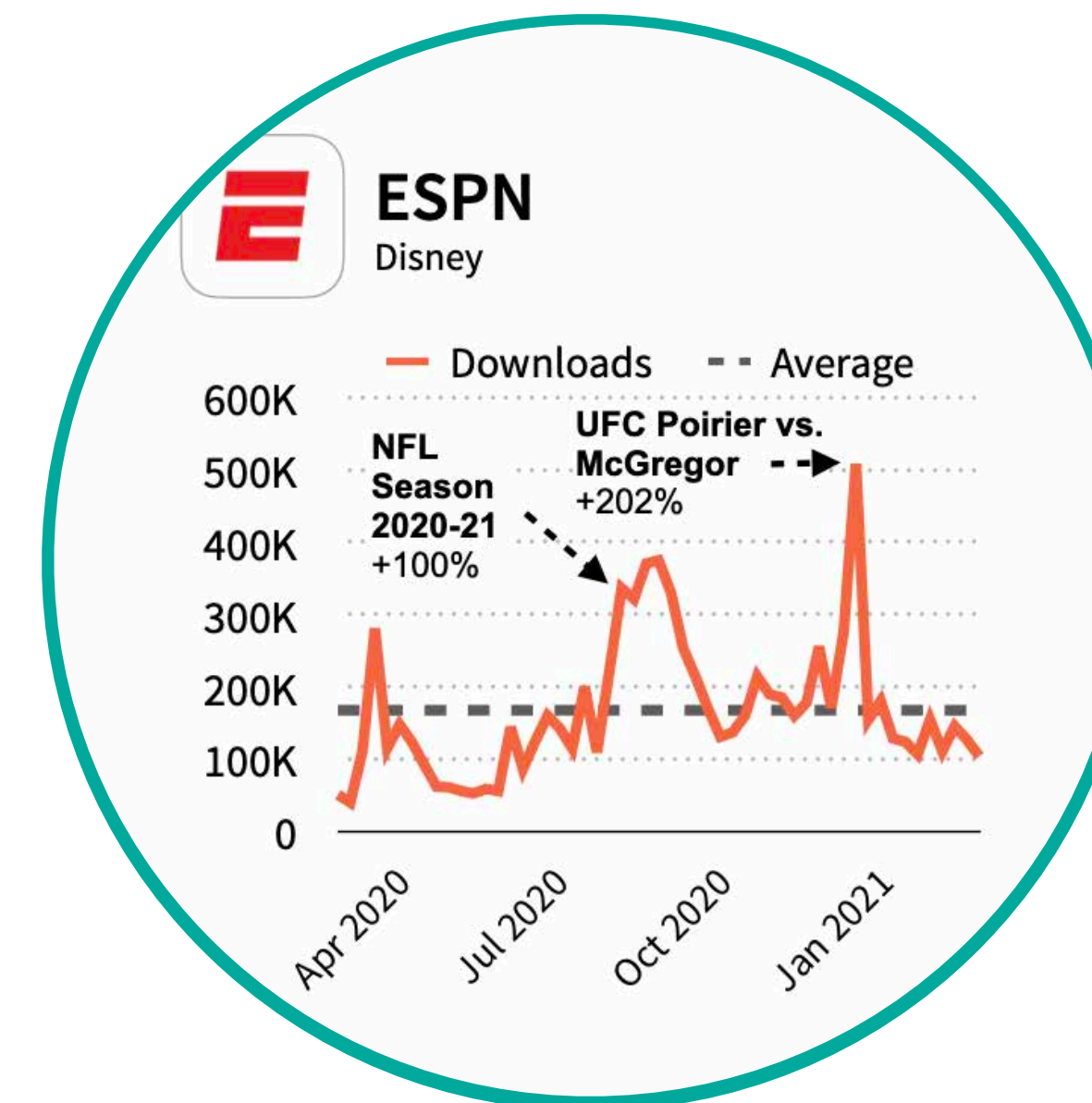
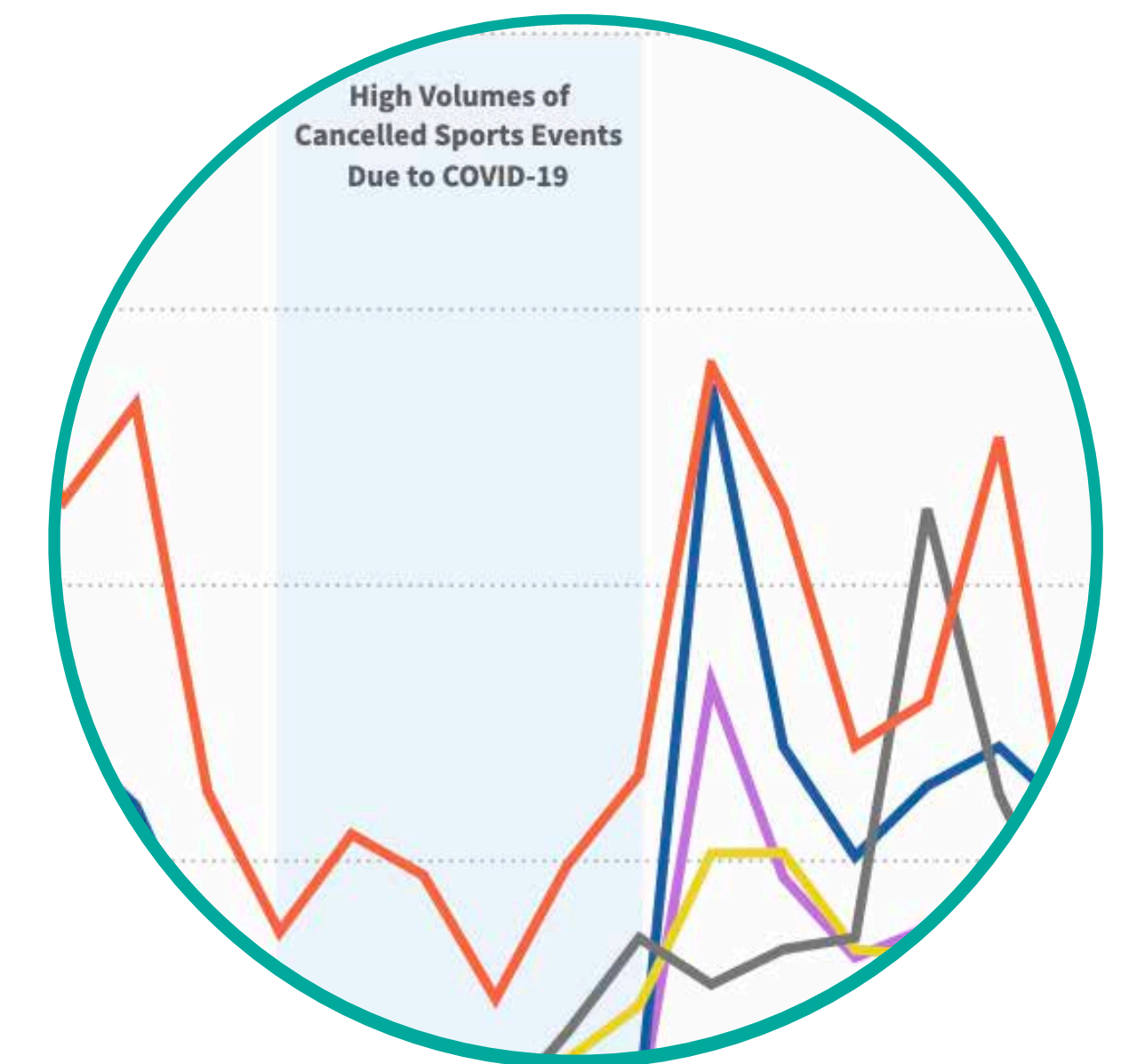
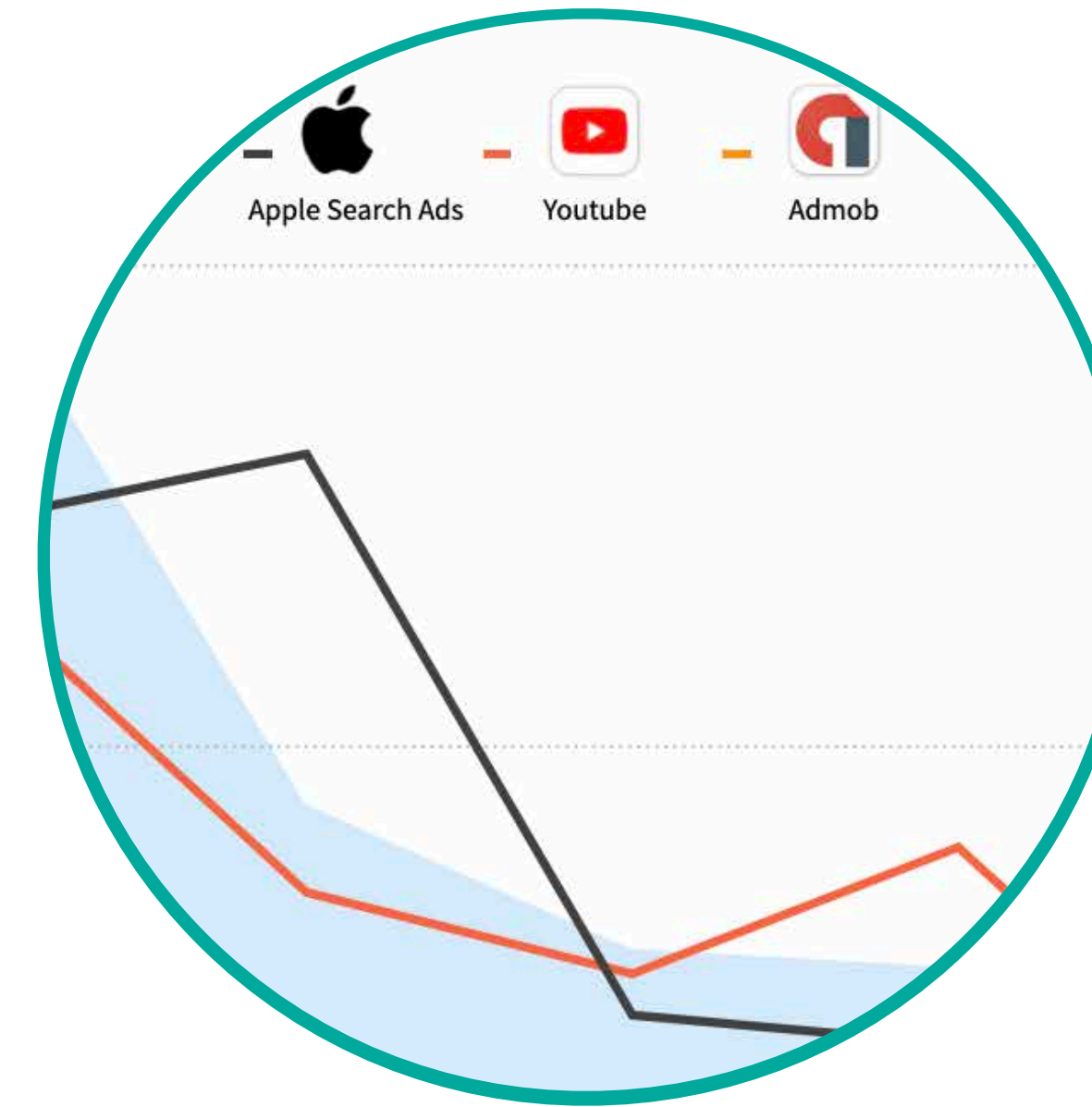
- Q4 2019 was the best quarter for streaming apps by downloads as Disney+ entered the mobile market in November 2019. Overall adoption of the top 20 apps surpassed 88 million downloads that quarter.
- Streaming app revenue reflected a similar upward trend in 2020. Most of the top streaming apps contain in-app subscription packages which is a major contributor to the consistent revenue growth.
- As consumers were saving time by not commuting to offices and schools during quarantine, streaming services saw a rise in demand. Monthly active users (MAU) for the top 10 apps soared 36 percent in April 2020 compared to January 2019.



Conclusion

2. Disney+ gained nearly 20 million downloads in its first month of launch. The popular Disney original, The Mandalorian, was also released the same month.

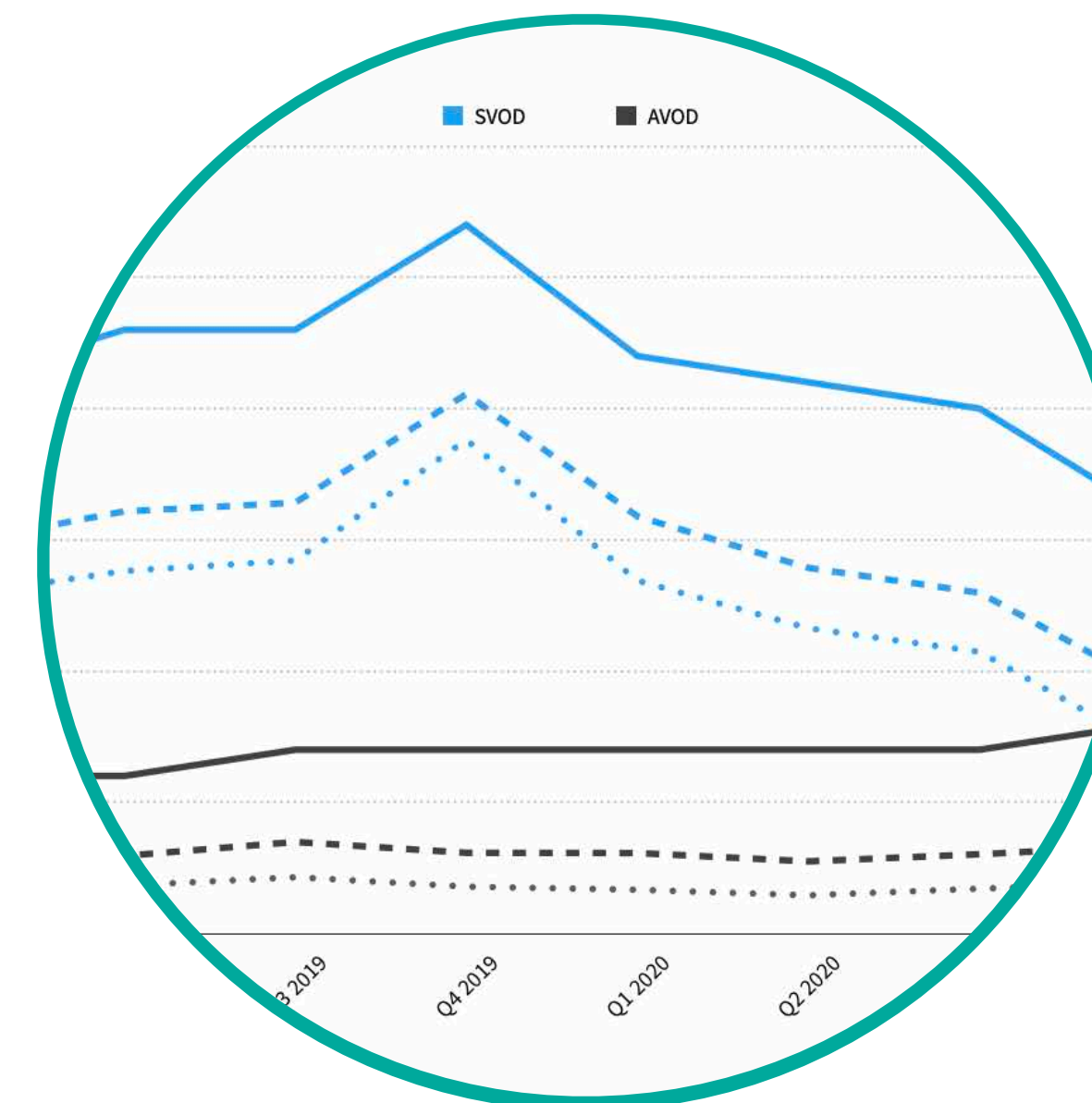
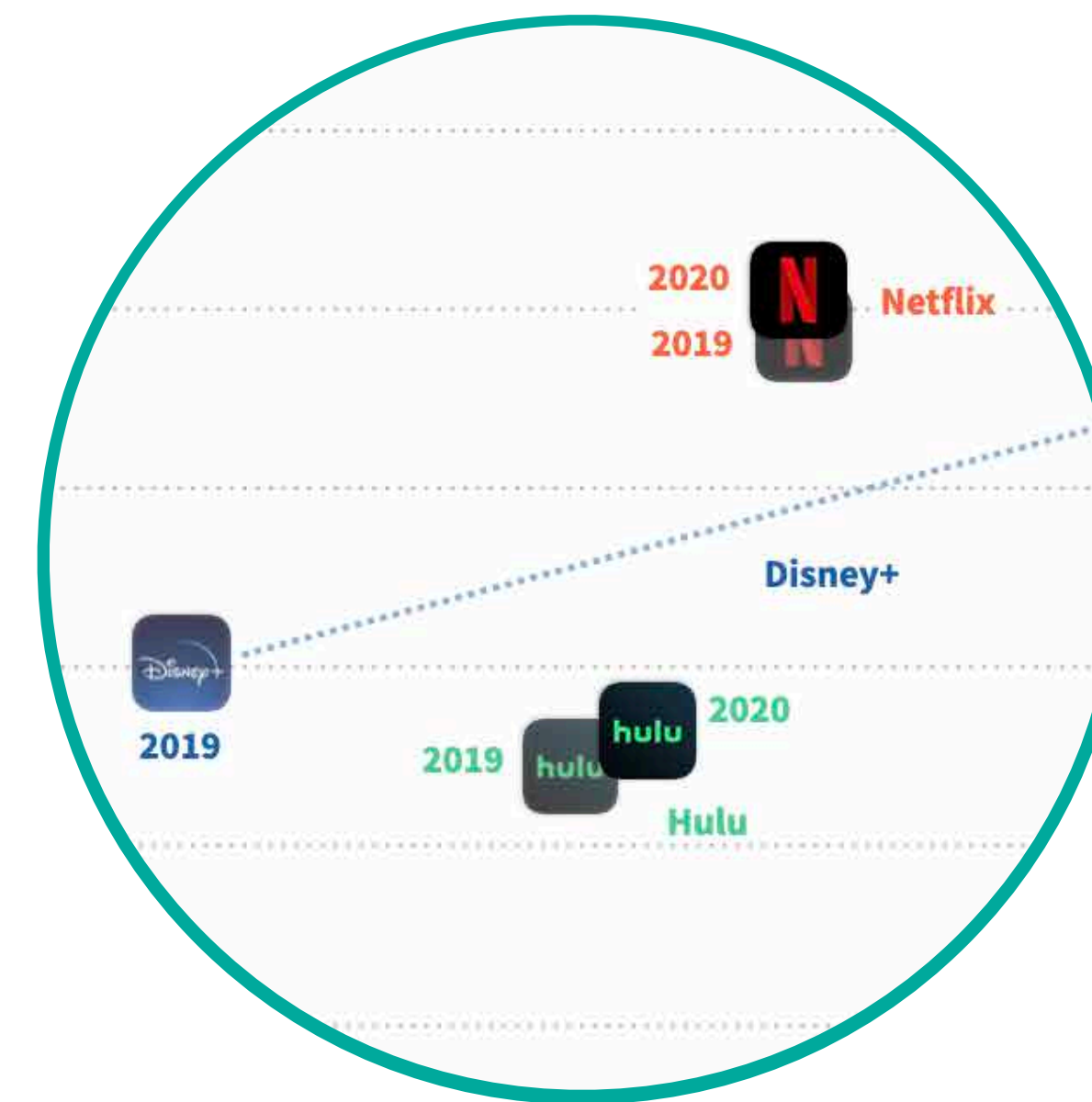
- Disney+ owes its success to a stable fan base as well as its advertising efforts on top mobile ad networks. In Q4 2020, Disney+ accounted for 1 percent of the share of voice (SOV) among all advertisers using Apple Search Ads.
- Despite a dip in adoption between March and August 2020 due to the cancellation of various sporting events, sports streaming apps rebounded quickly in September upon the start of the new NFL season. ESPN and NFL both surpassed 1.3 million downloads that month.
- Sports streaming app adoption boost was largely driven by popular sports events and leagues. Among the most popular sports in the U.S., football had the most impact on relevant app adoption in 2020.



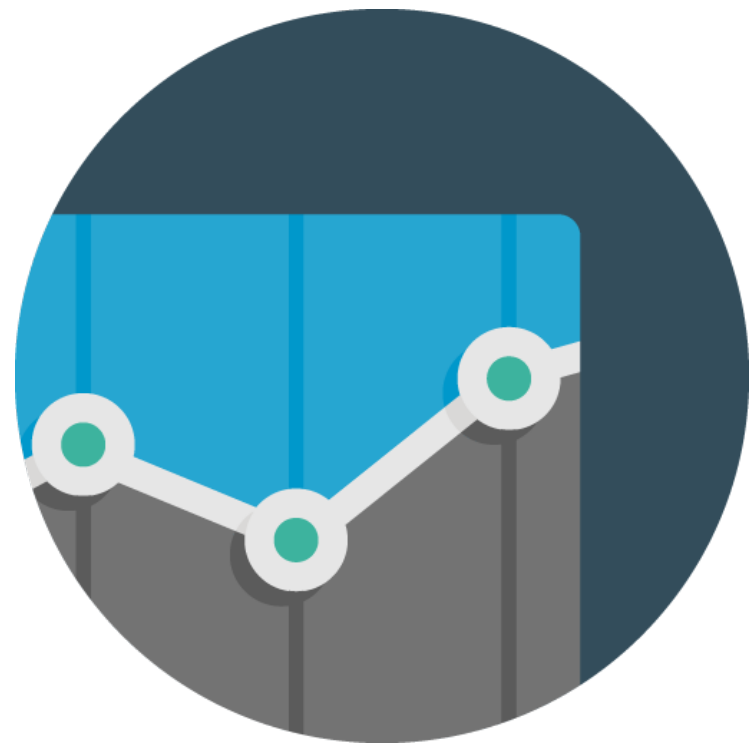
Conclusion

3. Subscription Video on Demand (SVOD) app revenue surges were driven by additional pay-per-view costs for new releases and events.

- Disney+ earned nearly \$60 million in consumer spending during the release of the live action movie *Mulan* in September 2020. ESPN also saw a revenue boost in January 2021 prior to a major UFC fight that was an additional \$70 for viewing.
- Most SVOD apps saw an immediate spike following the outbreak of COVID-19. Netflix adoption jumped up by nearly 50 percent in the 30 days following the outbreak and Hulu also saw a sizable boost of 25 percent in the same period. The top beneficiaries of the COVID-19 adoption boost were smaller SVOD apps with lower subscription costs.
- Streaming apps gained younger viewers during quarantine. SVOD app user age averaged around 30.8 years in Q2 2020, and AVOD apps averaged around 31.7 years. AVOD users are older than SVOD users by 1.3 years on average.



Sensor Tower Solutions



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Make strategic decisions with the industry's most accurate estimates.



App Intelligence

Drive organic growth with the leading App Store Optimization platform.



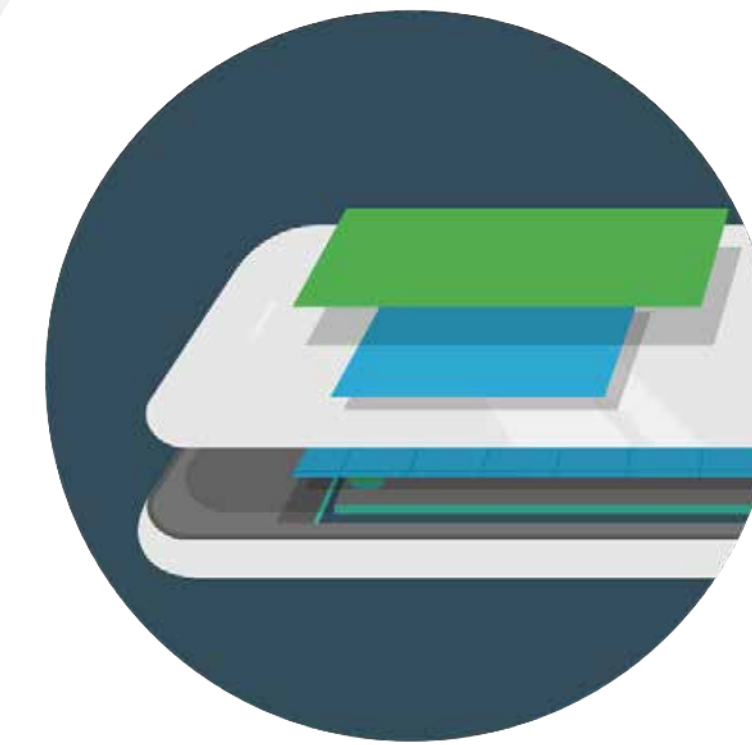
Ad Intelligence

Develop winning User acquisition campaigns with crucial mobile advertising insights.



Usage Intelligence

Benchmark app usage, engagement, and demographics.



App Teardown

Evaluate which SDKs apps are using and measure SDK adoption across market segments.



Consumer Intelligence

Access unfiltered mobile user engagement for financial analysis.

Sensor Tower

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Sensor Tower is the leading solution for mobile marketers, app developers, and industry analysts who demand competitive insights on the mobile economy. Sensor Tower's product suite includes: Top Charts, App Intelligence, Store Intelligence, Ad Intelligence, Usage Intelligence and Consumer Intelligence.

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