



BRAG INDEX III



Brand-centric insights for a mobile world

Foreword

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The Brand App-ocalypse

UA success in a post-privacy world has become highly unpredictable. Gone are the days when the choice was binary - either harness quantifiable performance marketing or evoke emotion with brand marketing. But now, with data constrained, marketers need to develop a dual focus and build capabilities to drive both conversion and connection.

From interviewing marketers of all sorts - UA folks, performance marketing pros, lifecycle experts, and retention specialists - the message comes through loud and clear: targeting on mobile is tougher than ever. And the pressure on marketers to rethink strategies and find new efficiencies is greater than ever.

The good news is that efforts to build strong brand pay dividends at every stage in the funnel. The value is real and tangible whether it materializes in higher installs or deeper loyalty. The not-so-good news is that quantifying what defines a strong brand and how to build one is never as black and white. At times, it feels like a black box.

The BRAG Index Gives Brand Meaning

Digital Turbine and Apptopia have created a framework that unravels the alchemy of brand and unlocks the blend of art and science in marketing.

By comparing performance results with customer sentiment surveys for Brand Awareness, Brand Velocity, and Brand Power, the companies have created an index that exposes which apps are winning at building brand AND user growth - and, importantly, explains how they are doing it. By identifying the winning strategies that have allowed apps that “punched above their weight,” this index provides marketers with a roadmap to learn, adapt and apply these approaches for themselves to drive positive results.



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Overview

What Is The BRAG Index?

The BRAG (Brand Relative App Growth) Index is a first-of-its-kind framework to look at the intersection of art & science in mobile advertising and its impact on the competitive environment.

By combining Apptopia's install estimates and product and marketing intelligence (i.e., ad placements, # and types of creatives, creative executions, etc.) with Brand Tracking (i.e., Awareness, Intent, Opinion, etc.) from the global research firm GWI, the BRAG Index is designed to help UA Managers and Marketers identify over-performing apps and provide access to different data to further explore the relationship between advertising for user growth and brand equity.

As we look through this lens, we are able to see common themes that led to certain brands outperforming others. Our insights are from the outside-in and we, of course, encourage feedback, suggestions and competing theories on what is leading to success. Have some? Reach out and share them.

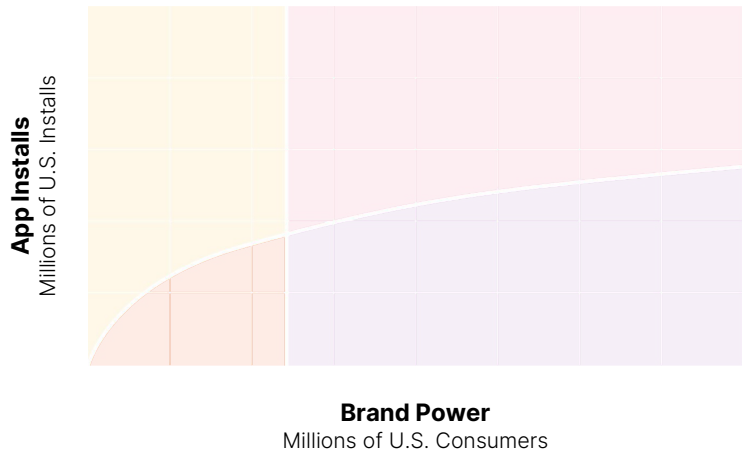
Glossary

BRAG	Brand Relative App Growth
BRAG Ratio	The ratio of an app's install volume to its Brand Power
Brand Power	Measured at the beginning of Q1 2023 via research completed by GWI, Brand Power measures the number of consumers a brand had amassed that had expressed awareness, interest and consideration in installing an app.
App Installs	Number of app installs in Q1 2023 based on Apptopia Performance Data
UA Brand Efficiency	How well an app translated its Brand Power into installs relative to other apps
Brand Opinion	An assessment of the strength of positive or negative sentiments towards an app
Brand Velocity	The change in an app's Brand Opinion over the last quarter
Brand Love & Attachment	The percent of consumers that express Love or Attachment of/to an app

The BRAG Box

The BRAG Box plots how 15-20 leading apps in each category performed in the previous quarter. It compares two key data points as defined on the previous page:

- 1) Full quarter **App Installs** on the Y-axis
- 2) Beginning of the quarter **Brand Power** on the X-axis



Two additional divisions are on the chart. The vertical line represents the average Brand Power of all apps measured. A horizontal line is the best-fit curve of the relationship between App Installs and Brand Power within the category. This curve, which we refer to as the **UA Brand Efficiency Curve**, then defines a baseline Install volume at different levels of Brand Power.

Using these two curves defines the four quadrants of the BRAG Box: Transcenders, Leaders, Blushers and Builders.

For relevant apps, the BRAG Box also show icons for the app with the highest **BRAG Ratio** as well as the apps with the 5 highest **Brand Velocity** rankings.



Top BRAG Ratio in Category



Q1 Brand Velocity Ranking



The BRAG Box Personas

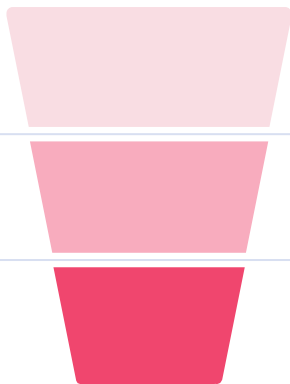
Apps will fall into 4 quadrants:

BRAND POWER

of consumers interested in category and aware of specific app

of consumers expressing "Install Intent" for an app

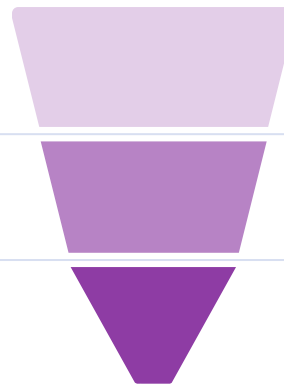
Actual # of Installs for the full quarter.



Apps that have above average Brand Power and Install performance.



Apps that have below average Brand Power but above expected Install performance.



Apps that have above average Brand Power but below expected Install performance



Apps that have below average Brand Power and below expected Install performance

Top BRAG-gers of Q1 2023

Here are the apps with top BRAG-ing rights.

An app's BRAG Ratio is the ratio between its Installs and its Brand Power (see glossary on Page 4). The higher the BRAG Ratio, the better an app performed against its Brand Power.

These apps with the highest BRAG Ratio therefore aren't always the apps with the most installs. Rather, these winning apps are those who converted the greatest percentage of their Brand Power.



Four Winning Strategies

In analyzing App Install volumes and Brand Power for 20 leading apps across 5 popular app categories, there were 4 strategies that really stood out as separating the winners. They are:



Community Marketing

These apps either:

- 1) Cater to a niche community (like BeatMaker Pro for DJs) and effectively connected users from that community to organically grow the app, or
- 2) Have used successful marketing tactics to create intimate, targeted campaigns at a micro-community (like Peacock TV did for WWE fans 0.



Product-Led Growth

Apps that effectively use their product to help bring in new users or spur business from existing ones. In some cases the product itself is noteworthy enough to grow organically. In other cases, apps saw success through the use of loyalty programs, generating product-worthy buzz, or incentivizing users to recommend the app to family and friends.



Advertising Execution

Apps that effectively used creative storytelling, media mix, social media influencers, novel campaign sequencing, or other mobile advertising strategies to outgrow their peers.



Device Integration

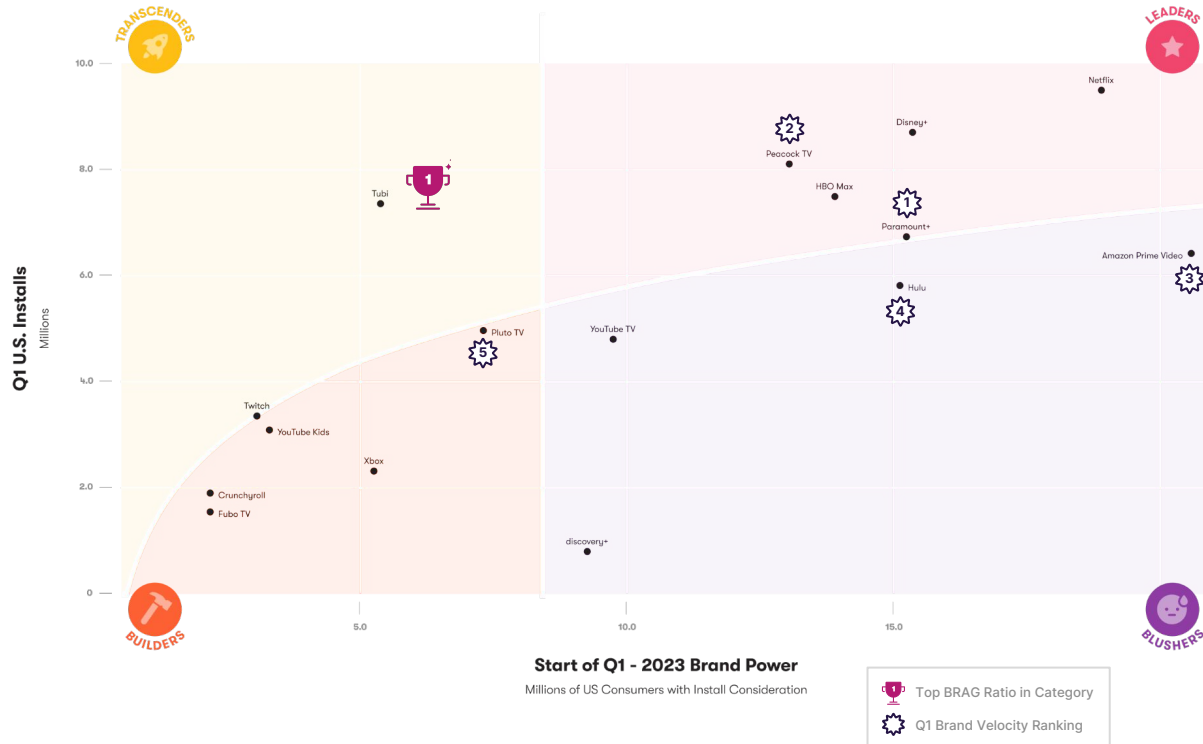
Apps that have seen successful growth thanks to partnerships that allow them to be integrated into the device experience - like Shazam being part of the iPhone interface or Facebook with universal preloads.

CATEGORY

Streaming Video

Streaming Video

The BRAG Box



UA & Brand Takeaways

Key stories include:

Netflix vs. Amazon: Netflix and Amazon Prime Video have similar high levels of Brand Power, but in Q1 Netflix delivered 48% more growth. This is despite Amazon having the 3rd highest Brand Velocity.

Peacock's Mid-tier Efficiency: In the mid Brand Power range, 4 providers entered Q1 with category-leading increases in Brand Velocity, but Peacock executed most efficiently.

Tubi's Transcendence: At the low end, Tubi's UA Brand Efficiency continues to overperform despite comparatively low awareness and intent.

BRAG Box: Apps of Note



**HBO Max
discovery+**

UA Growth Strategy: Product-Led Growth

If you can't build UA, can you combine UA? Streaming options are abundant and driving UA growth for niche-oriented content is challenging. By combining HBO Max and Discovery+, Warner Bros is betting that its newly-named Max service will cure discovery+'s challenges of low consumer sentiment and average Brand Power and Brand Velocity by mixing their non-fiction, niche-based content with HBO's more mass market friendly storytelling. The market is bound to consolidate, but transitioning these brands will be tricky. Cross-promotion and maintaining brand equity will be critical. We'll continue to use BRAG metrics to measure their success.



Peacock

UA Growth Strategy: Community Marketing & Advertising Execution

Peacock TV's Advertising Execution stands out from other Leaders because it includes Search Ads. According to [Apptopia Search Intelligence](#), they used high-intent searches for specific content, e.g. "nhl games" and branded keywords of competitors, e.g. Tubi. Peacock also leveraged ASO to do Community Marketing, updating its metadata to highlight niche sports programming leading up to each sport's big event: IndyCar (Daytona 500 in February), Golf (Master's in early April), and WWE. As a result, Peacock logged the 3rd highest Brand Velocity, as their Brand Power vaulted ahead of YoutubeTV and discovery+ over the last 6 months.



BRAG Box: Apps of Note



Tubi

UA Growth Strategy: Product-led growth

What is it about Tubi that it transcends expectations in every BRAG report? In a category dominated by for-fee offerings, “Watch Movies Free” attracts users and it makes a service easy to recommend to friends. But PlutoTV is also free, and according to Apptopia Ad Intelligence, PlutoTV invested in 2.4x more ad impressions than Tubi in Q4 and Q1, and Pluto came into Q1 with the 5th highest Brand Velocity. One factor boosting Tubi’s UA Effectiveness is its massively positive user reviews. [Apptopia Review Intelligence](#) shows that since October of 2022, Tubi’s positive app review sentiment has scored 92%, more than double that of Pluto. Product and experience matter and can be the source of competitive UA advantages.



Netflix









UA Growth Strategy: Advertising Execution

Netflix mobile advertising video creatives are typically trailers of the latest content, but in Q1 [Apptopia Ad Intelligence](#) shows one of Netflix’s top performing ads was a brand campaign. “Netflix starts at \$6.99 a month for the people who... [insert consumer interests as the TV show that would appeal to them plays in the background]”. A brand campaign makes sense for a market leader pursuing a new type of audience (the type that will put up with ads to pay less). A brand campaign and a retargeting strategy clearly led to conversions, as Netflix holds it spot as a Leader.



Top 10 BRAG-gers

Q1 2023
BRAG Ratio

	1	Tubi	1.37
	2	Twitch	1.13
	3	YouTube Kids	0.93
	4	Crunchyroll	0.86
	5	FuboTV	0.71
	6	Pluto TV	0.68
	7	Peacock TV	0.62
	8	Disney+	0.57
	9	HBO Max	0.54
	10	Netflix	0.50

Apptopia Insight

Optimize for App Store Search

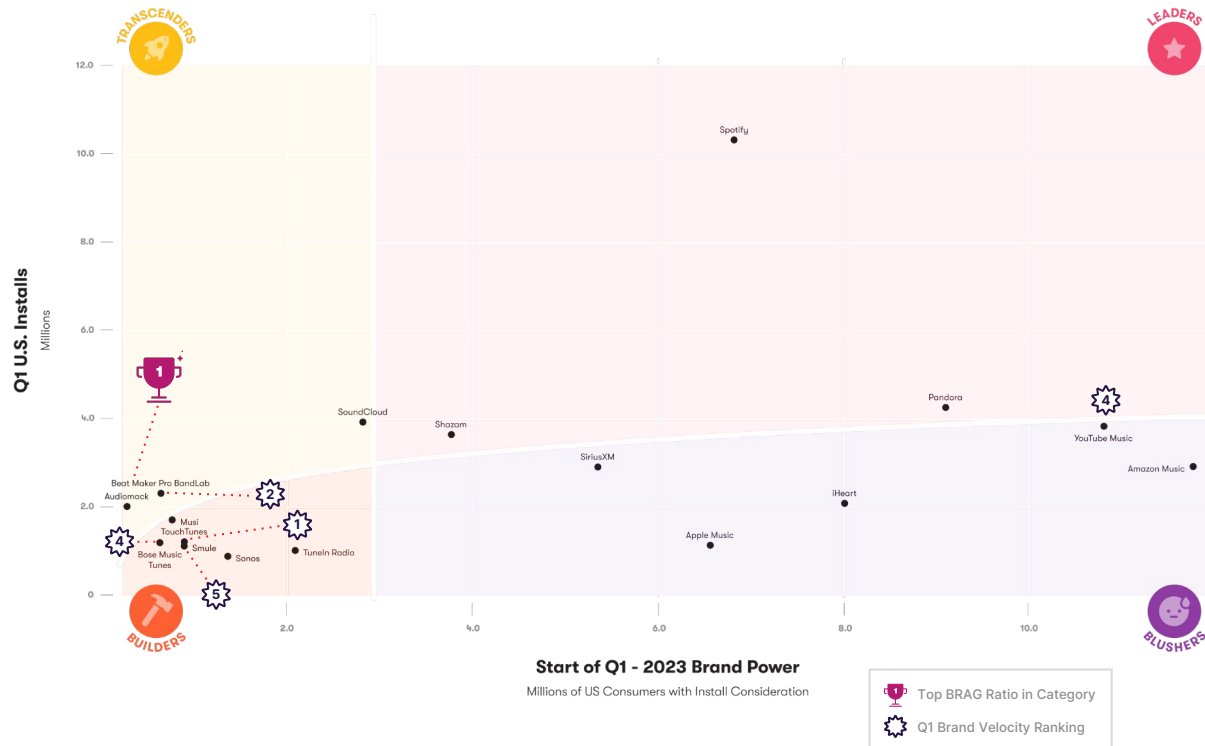
“ Even though consumers may opt to stream on a bigger screen, the mobile app is a part of the new account registration and login process today — particularly as password-sharing tightens. Ensure your value propositions, from content to price to accessibility, are optimized for App Store search. Consider upping your game with Search Ads, so you might catch the high-intent consumer already on the couch and searching your competitors' app to register.

CATEGORY

Streaming Music

Streaming Music

The BRAG Box



UA & Brand Takeaways

Key stories include:

Spotify's Dominance: Spotify spent far less than Sirius XM but, according to Apptopia, had the 2nd most observable impressions.

Flatter UA Brand Efficiency: Unlike Streaming Video, where strong Brand Power resulted in higher installs, in Music, the Brand Efficiency curve was flatter.

Community-Based Transcendence: Apps that cater to smaller communities like Audiomack, Beatmaker Pro, and SoundCloud had install growth that rivaled category giants despite low Brand Power.

Niche Brand Opinion: Niche apps TouchTunes, Smule, Bose, and BandLab powered up on positive customer sentiment being 4 of the top 5 apps for Brand Velocity.

BRAG Box: Apps of Note



Beat Maker Pro BandLab

UA Growth Strategy: Community Marketing

In February, we wrote that these apps have low awareness, but are loved by those that do use them! Their strong Brand Velocity scores and overall Install performance – some on par with the music Goliaths – show that having a small audience doesn't mean you can't achieve transcendent success. With a niche audience, UA marketers can lean into building a community among the users of that app, which helps create viral buzz while also building brand loyalty and lead to organic growth.



Shazam

UA Growth Strategy: Device Integration

Can you believe the Shazam app turned 20 years old last year? The app remains in pop culture due to the "Beat Shazam" game show, but the app's continued UA success certainly isn't due to its below average Brand Love or its near bottom Brand Velocity. It is due to its integration with Apple. Apple uses smart discovery throughout its devices for news, music, and video. And thanks to premium placement of Shazam, the app continues to thrive even after 20 years.

BRAG Box: Apps of Note



Audiomack

UA Growth Strategy: Advertising Execution

After testing for efficiencies with different ad networks and Search Ads in 2022, Audiomack turned up the volume on both marketing channels in Q1. According to Apptopia Ad Intelligence and [Search Intelligence](#), Audiomack ran mobile ads to acquire Android users and Search Ads on iOS.













Spotify

UA Growth Strategy: Advertising Execution & Device Integration

In Q1, Spotify diversified its advertising channel strategy to include more Mobile Web placements according to [Apptopia Ad Intelligence](#). Mobile Web is the ultimate discovery channel because, well, everyone with a mobile device browses it. And to enhance discovery even further, Spotify has leaned heavily into preloads with top carriers and OEMs. Since Spotify has built its product to include libraries of music, podcasts, and, more recently, audiobooks, it does have something to offer to everyone and this migration makes sense at Spotify's maturity.

Top 10 BRAG-gers

Q1 2023
BRAG Ratio

	1	Audiomack	8.27
	2	Beat Maker Pro	5.40
	3	BrandLab	3.79
	4	Musi	2.35
	5	Bose Music	2.01
	6	Spotify	1.49
	7	TouchTunes	1.41
	8	SoundCloud	1.40
	9	Smule	1.34
	10	Shazam	0.97

Apptopia Insight

Combine Creative Campaigning & Discovery

“ When many apps share similar content libraries, consider a media mix combining:

1. Highly-targeted advertising creatives tailored to specific musical segments, and
2. Broad device-based discovery to encourage trial.

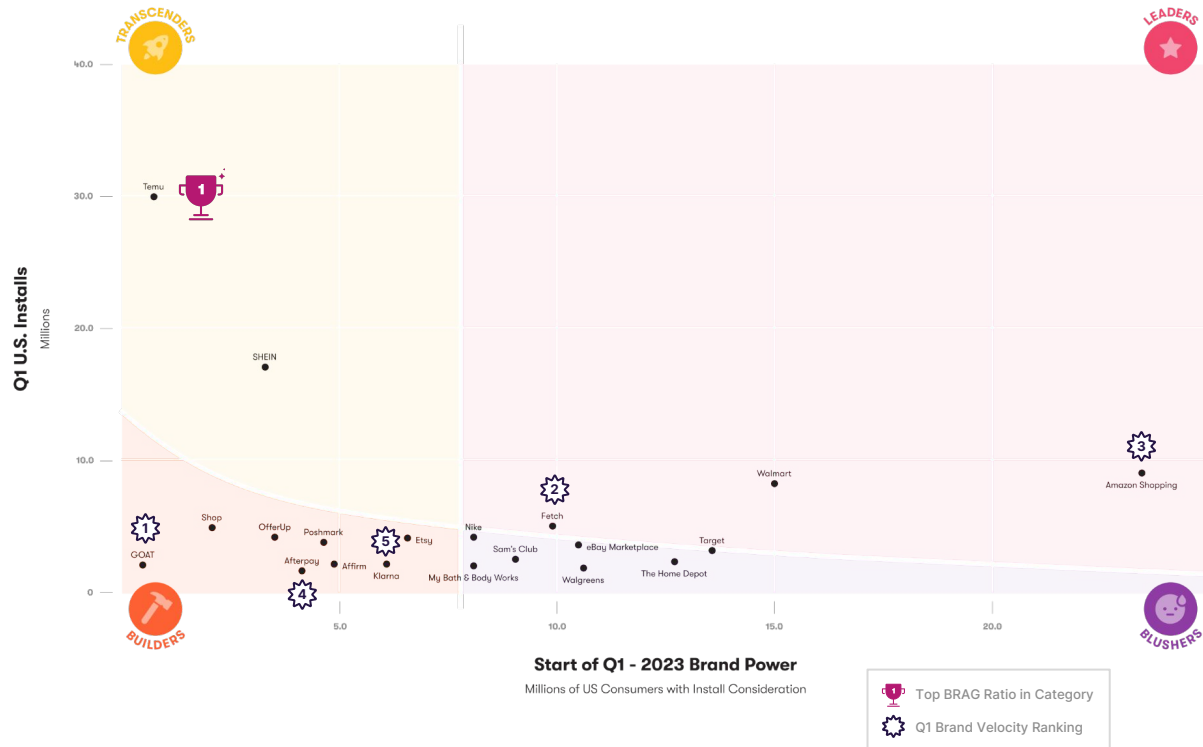
This approach merges the creative aspects of segment marketing with the broad reach and effectiveness of product sampling.

CATEGORY

Shopping

Shopping

The BRAG Box



UA & Brand Takeaways

Key stories include:

Temu and SHEIN Breakaway: The two fast-growing fashion apps completely invert the UA Brand Efficiency curve due to disproportionate growth with little Brand Power.

Amazon vs Walmart: Amazon easily leads in Brand Power, 50% higher than the number 2 app Walmart, but Walmart tallied almost as many installs.

Buy Now, Pay Later: While all BNPL apps have below average brand power, Klarna and Afterpay have 2 of the top 5 highest Brand Velocities.

BRAG Box: Apps of Note



Amazon

UA Growth Strategy: Product-led Growth

The shopping giant is still the undisputed market leader despite having fewer installs than Temu and SHEIN. By far the leader in Brand Power, Amazon's other brand metrics are also stellar. Amazon has unequaled consumer love – 80% of people aware of Amazon have a favorable opinion – the highest level of Brand Attachment (59%, just ahead of Fetch's 57%) – and the 3rd highest Brand Velocity.



Fetch

UA Growth Strategy: Product-led Growth

The CPG rewards app was second to Amazon in our February Brand Love rankings. But while 86% of consumers are aware of Amazon, only 36% are aware of Fetch. But growth for Fetch happens organically because 64% of customers are willing to recommend the app. By incentivizing loving customers and making discovery and installs easy, Fetch should continue to have growth success.

BRAG Box: Apps of Note



Temu

UA Growth Strategy: Advertising Execution

Temu built massive volume through mobile advertising before its Super Bowl ads got people talking. [Apptopia Ad Intelligence](#) shows that while growing via mobile ads for 5 months prior, it ran app install campaigns with basic creatives that did not focus on brand, but rather on cheap fashion and consumer goods. The Super Bowl ad was strategically timed to unveil the “Shop like a Billionaire” tagline. Curious consumers would go to the app stores to see Temu at #1 already, with thousands of app reviews. That said, Temu posted the lowest Brand Love in the category, and third from last for Brand Velocity. It’s still early for Temu, and building these brand metrics will be critical in capitalizing on their profound UA growth.













SHEIN

UA Growth Strategy: Advertising Execution

Apptopia Ad Intelligence shows SHEIN’s top performing creatives in Q1 looked different than in Q4 – as the fast fashion app invests to expand its addressable market to men. SHEIN also leveraged in-app events in the Apple App Store to convert new installs for its Spring Sale (90% off) in March. Temu took notice and promoted an in-app event for a spring sale advertising the same discount.

Top 10 BRAG-gers

		Q1 2023 BRAG Ratio
	1 Temu	22.4
	2 Shein	5.24
	3 Shop	2.45
	4 GOAT	2.05
	5 OfferUp	1.22
	6 Poshmark	0.84
	7 Etsy	0.64
	8 Walmart	0.56
	9 Nike	0.54
	10 Fetch	0.51

Apptopia Insight

Nurture Brand Loyalty

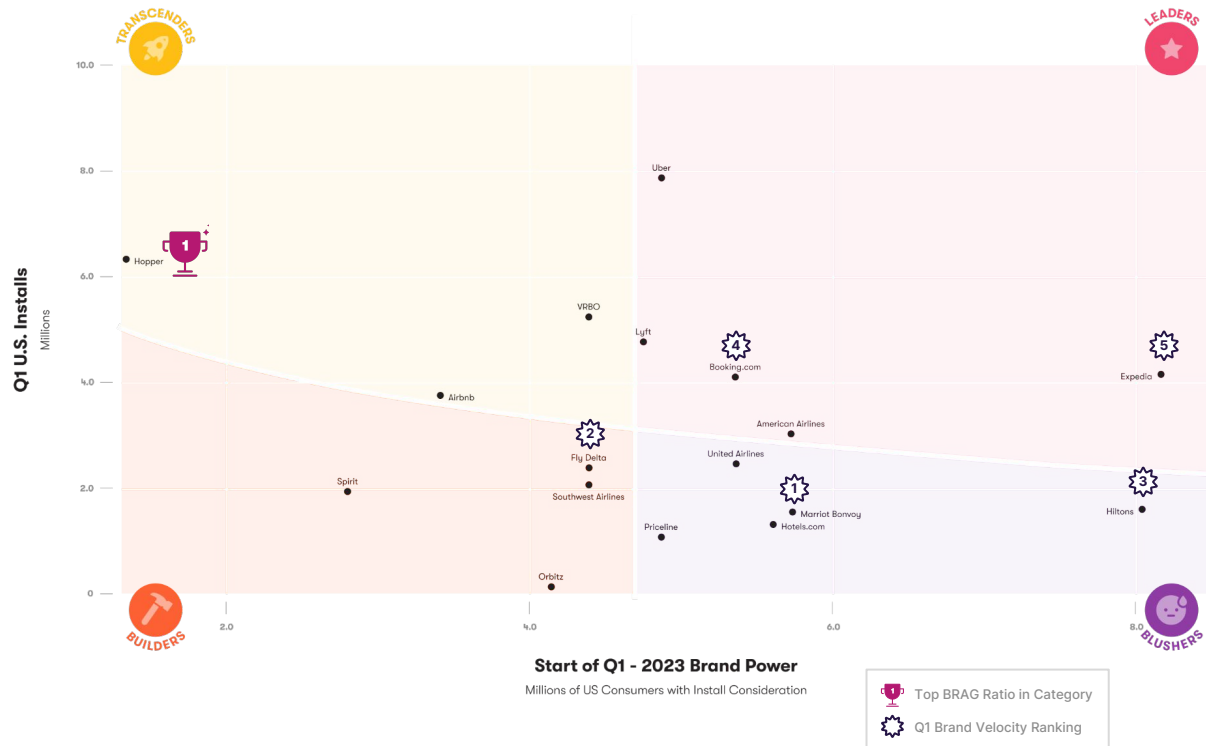
“ In a market being disrupted by new entrants, now more than ever it's important to nurture loyalty to your brand. Utilize data and analytics to better understand your audience. Create, test and optimize advertising and customer messaging around boosting customer satisfaction using personalized offers and rewards programs.

CATEGORY

Travel

Travel

The BRAG Box



UA & Brand Takeaways

Key stories include:

Uber vs Lyft: With almost equal Brand Power coming into the quarter, Uber far outperformed its rival.

Expedia's Brand Power: Well ahead of all other travel brands with the singular exception of Hilton, the aggregator logged solid gains in both brand and installs.

Hopper's Brand Efficiency: Hopper's install volume was so high that the entire Brand Efficiency curve was inverted - the app drove more installs than anyone except Uber despite having the lowest Brand Power in the category.

BRAG Box: Apps of Note



Uber

UA Growth Strategy: Product-led Growth

The two key rideshare apps, Uber and Lyft, sit similarly in Brand Power. But Uber's performance greatly outpaces its rival. While some of this is due to Uber serving more localities than Lyft, our data shows that Uber has created a stronger attachment with its users. Lyft could have the opportunity to do what Uber has done to become more "sticky": focus on loyalty programs and growing service options.



Marriott
Bonvoy

UA Growth Strategy: Advertising Execution

One thing we've found throughout our BRAG Rankings: people love rewards! While Marriott's Brand Power is much lower than Hilton's, their user growth is higher. And out of all travel apps, Marriott has the highest percent of its customers willing to recommend it. Travel is all about adventure and Marriott successfully extends that into creative top-of-the-funnel branding campaigns that focus on storytelling. From Q4 2020 to Q1 2023, [Apptopia Ad Intelligence](#) shows Marriott had 2x more impressions than Hilton, while running 2x more unique ad creatives and a heavier focus on social media.



BRAG Box: Apps of Note













Hopper

UA Growth Strategy: Advertising Execution

Hopper's targeted approach to marketing means it builds less of a brand; however, its effectiveness in converting audiences and building a product worth talking about positions it as a Transcender. Hopper's top performing ads in the last year are on TikTok, according to Apptopia Ad Intelligence. This aligns with comments made to Apptopia by its Head of UA about finding success with social media marketing as an acquisition channel.

Top 10 BRAG-gers

Q1 2023
BRAG Ratio

	1	Hopper	4.72
	2	Uber	1.61
	3	VRBO	1.19
	4	AirBnB	1.10
	5	Lyft	1.00
	6	Booking.com	0.76
	7	Spirit	0.70
	8	Fly Delta	0.53
	9	American Airlines	0.53
	10	Expedia	0.51

Apptopia Insight

Build Loyalty into the Product

“ Travel companies have always been focused on loyalty - well before mobile. Today, mobile apps can act as your loyalty headquarters, where users can view offers, pay, check their status in real-time and more.

Capture the Upsurge

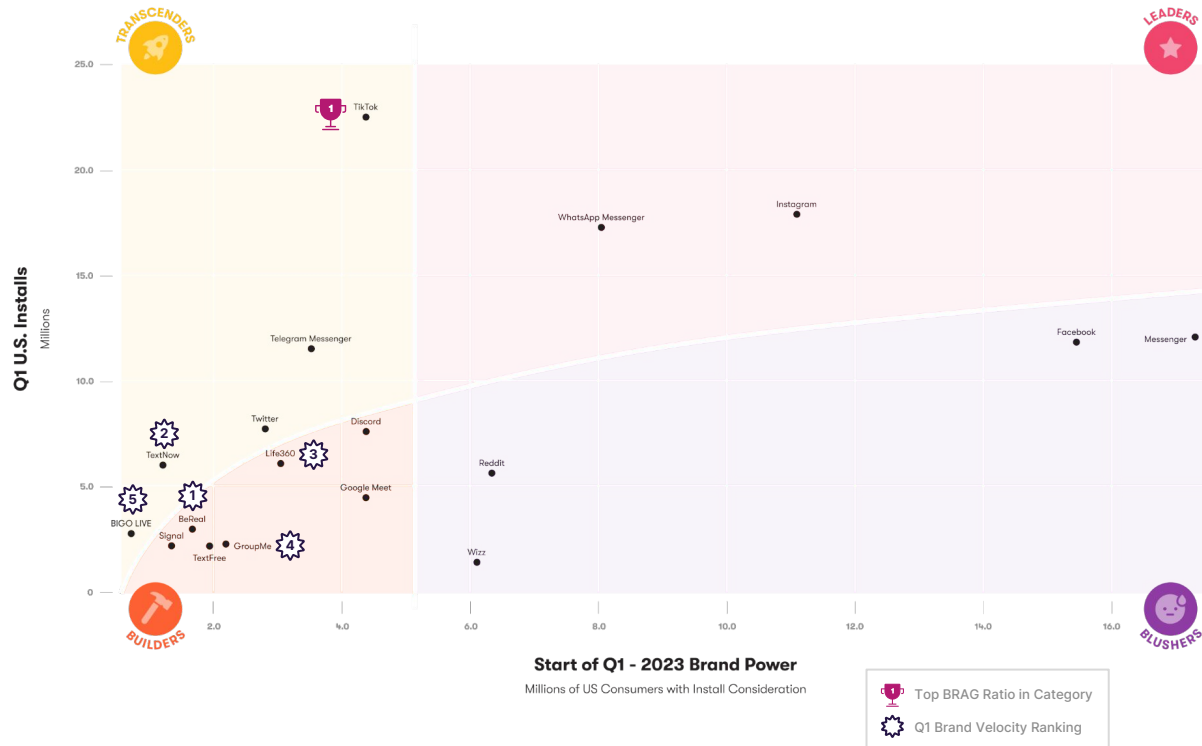
“ Invest more in advertising than just seasonally-adjusted levels. According to Forbes, a whopping 49% of U.S. consumers plan to travel more in 2023 than in 2022. Drive engaging creative in contextual-targeted environments.

CATEGORY

Social Media

Social Media

The BRAG Box



UA & Brand Takeaways

Key stories include:

Meta's Brand Power: The social media giant's 4 apps far outpace the competition, with WhatsApp and Instagram using it to post strong install growth

TikTok's breakout growth: Despite much negative media leading to lower levels of Brand Power, TikTok took the crown for category installs

Lack of Big-Time Brand Velocity: Social is the only category where all top 5 leaders in Brand Velocity came from smaller apps. Though not shown, it's one of 2 categories with apps (4 in total) with negative Brand Velocity

BRAG Box: Apps of Note



META

- Facebook, Messenger
- Instagram
- Whatsapp

UA Growth Strategy: Device Integration

Meta properties dominate in Brand Power, holding the top 4 positions. And any negative press hasn't affected them when it comes to growth. Meta does an excellent job of integrating their properties - which drives growth for the "lesser known" brand names, Whatsapp and Instagram. Meanwhile, Meta preloads its app on many devices - a strategy that protects them from user churn or market downturns.



TikTok

UA Growth Strategy: Device Integration

Our BRAG Index leader uses preloads in a different way. Instead of using it to protect market share, TikTok uses it for growth. Even as our survey results showed the app had poor customer sentiment, its growth still vastly exceeded every other app in the category! TikTok's "frictionless" nature extends itself to its advertising as they make it very easy for users to discover, learn about, and install their app.

BRAG Box: Apps of Note



Telegram











UA Growth Strategy: Product-Led Growth

According to release notes recorded in Apptopia, Telegram added over a dozen new features in Q1 including innovative media-sharing and group messaging controls. Notably a QR code entry was created to allow first-time users to join a group channel and experience the product and privacy as a guest; therein increasing network effects – the ultimate product-led growth hack. In the last month, WhatsApp release notes show it has taken notice and upgraded group channel capacity and features.



Top 10 BRAG-gers

Q1 2023
BRAG Ratio

	1	TikTok	5.12
	2	TextNow	4.99
	3	BIGO LIVE	3.90
	4	Telegram Messenger	3.27
	5	Twitter	2.77
	6	WhatsApp Messenger	2.15
	7	Life360	2.01
	8	BeReal	1.78
	9	Discord	1.74
	10	Signal	1.70

Apptopia Insight

For apps who by nature are about sharing, focus on leveraging current users to drive growth.

Focus on the Guest User Experience

“ Referrals are a natural UA strategy for social apps. Continually work on the guest and “recipient” experience and how it encourages onboarding as a member.

Build Brand By Giving Users Reasons to Share

“ Your users aren’t the only ones that can start a conversation. Think how you can create them outside the app. For example, with BeReal, their ‘drop everything and take a picture’ campaign attracted attention and gave non-users FOMO.

Appendix

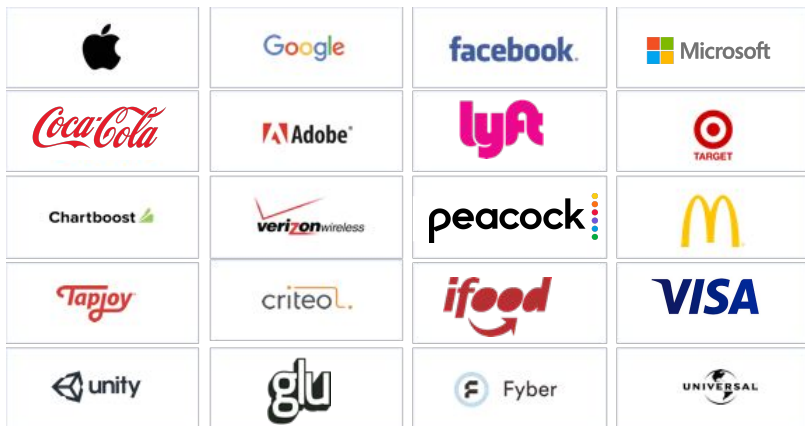
Apptopia is the leader in real-time competitive intelligence



Industry Agnostic

Trusted by more than 100,000 publishers worldwide

We enable brands to analyze critical competitive signals across mobile apps & connected devices.



Data on over 7M+ apps

Coverage in over 120 countries

Data Points

- Downloads
- IAP Revenue
- Daily Active Users
- Monthly Active Users
- Avg. Sessions Per user
- Total # of Sessions
- Avg. Session Length
- Total Time Spent In App
- SDK installs/uninstalls
- Demographics
- Cross-app usage
- Feature tagging
- User reviews

Data Granularity

- App
- Store
- Day
- Country

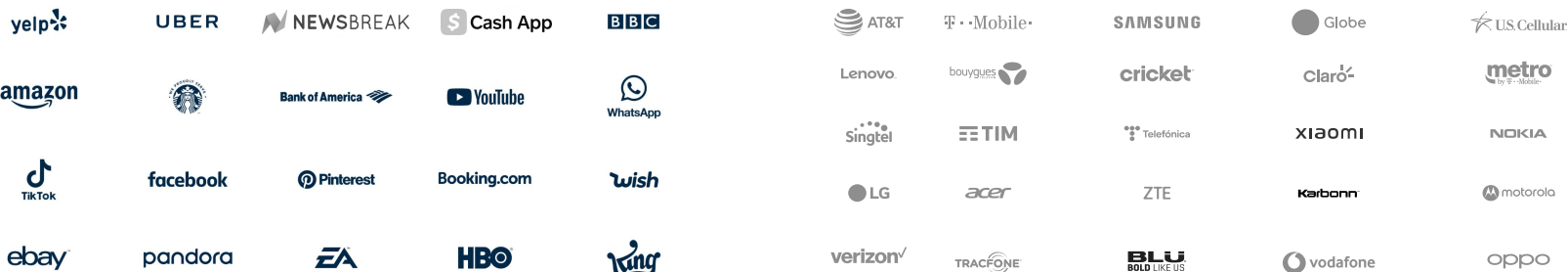
Digital Turbine is the largest independent mobile growth platform



The Choice for Breakout Growth

Partners to 70% of the Top Apps in Google Play

Digital Turbine (NASDAQ: APPS) powers superior mobile consumer experiences and results for the world's leading telcos, advertisers, and publishers. Its end-to-end platform uniquely simplifies their partners' ability to supercharge awareness, acquisition, and monetization — connecting them with more consumers, in more ways, across more devices. Digital Turbine is headquartered in North America, with offices around the world. <https://www.digitalturbine.com>



Thank you!



Digital Turbine



apptopia