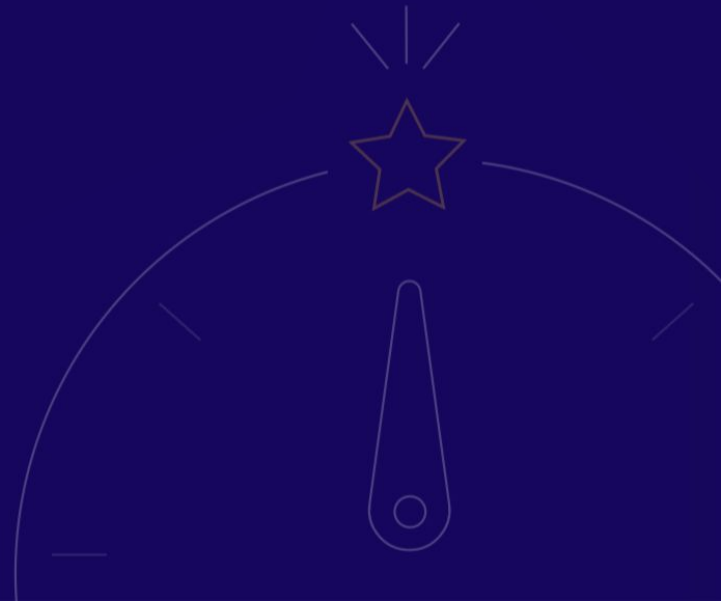


THE  
**BRAG  
INDEX**



Leaders and laggards in a brand centric world



# FOREWORD

We couldn't bring you the BRAG Report without BRAG-ging about the people that helped bring this vision to life.

The BRAG Index started last year from an idea I kicked around with **John Scheila**, president of Phoenix Marketing, guru of brand assessment, and good friend. While looking at current industry insights, John and I spoke about the lack of any metrics relating the obvious impact of Brand Awareness on the challenges of mobile growth.

From there, the patience and explorations of **Ravi Pimplaskar**, **Anna Miller**, and **Marissa Camilli** of Digital Turbine's marketing team really helped sort out initial survey data and put initial meat on the bones, taking the report from concept to initial packaging. Thanks to their tireless energy and creativity, we kept making steady progress.

**Matt Gillis**, President On Device Solutions at Digital Turbine, made a critical introduction to **Jonathan Kay**, CEO of Apptopia, who introduced Digital Turbine to his awesome marketing leaders: **Adam Blacker**, **James Lasson**, and **Tara Kirkpatrick**.

With a shared intellectual curiosity, deep expertise in mobile insight, and straight-shooting feedback, it was obvious from the first minutes of talking that Adam, James, and Tara and team Apptopia was a great partner.

In Jonathan's words, "Oftentimes the most impactful insights come from combining multiple data points and multiple perspectives. This helps cut through all the noise in the app stores to find out what's moving the needle, and that's what we've worked on alongside Digital Turbine."

A final note of appreciation to **Joyce Tao**, **Kelly Howe**, **Abdelrahman Shetewy**, and **Chad Morgan** of our respective design teams, and to **Mimi Torrington**, for their patience and creativity in pulling this all together and promoting it out to be read.

The launch of our first report is just the beginning. Have thoughts? Questions? Don't be bashful. BRAG away! We're here to hear.

**Greg Wester**

CMO, On-Device Solutions, Digital Turbine



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40 About Digital Turbine and Apptopia

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# BRAG Overview

BRAG stands for brand relative app growth. It shouldn't be a surprise (and our research confirms) that having a strong brand funnel – high levels of awareness, consideration, and intent – creates greater app growth potential.

For example, a CMO of an emerging shopping app likely has a less developed brand funnel than say, Amazon. With lower brand awareness and interest, it would be expected that this CMO's mobile growth would likely be much smaller than Amazon's.

But every quarter, certain apps manage to transcend their brand presence and deliver installs well beyond what we might expect. The BRAG Index seeks to quantify these overachievers that “punched above their weight class.”

While most app user growth analyses focus solely on net growth, the BRAG Index goes deeper into brand funnel analytics to find the successful strategies of exceptional heavy-hitters. In other words, how exactly have they ramped up their mobile user growth faster than their peers?

With this lens in mind, Digital Turbine and Apptopia partnered to create the BRAG Index to:



Measure app growth relative to brand funnels



Identify apps whose growth transcends their brand funnel, delivering growth beyond their peers



Explore and discuss the strategies of these Transcenders



# BRAG Methodology

## The BRAG Methodology

The BRAG Index is derived from combining two data sources:

Online surveys of mobile phone users completed by Digital Turbine

App install volume sourced from Apptopia's Performance Data.

From these two data sources, we've developed two new growth metrics:



**Growth Potential:** We surveyed consumers about brand funnel metrics (e.g., awareness, usage, opinions, loyalty, and interest) for 20 leading apps in 7 different categories. Only groups that showed interest in an app category were asked about individual app awareness, ownership, and install intentions.

These brand funnel measures were factored together to give each app a Growth Potential score that reflects their top-of-the-funnel demand headed into a quarter – in effect, the number of consumers seemingly primed to install the app. To count towards Growth Potential, a consumer must:

Express interest in the category of mobile apps

Be aware of the app

Not currently have the app

Express intent to install the app over the next few months

For example, a customer would be asked about Finance apps only if they are interested in Finance apps (38% were interested). Of those interested, they were then asked of their awareness of individual apps, such as Cash App (36% of those interested were aware). Out of those, they were asked if they had Cash App on their phone. And if they did not, they were asked if they had some level of intent to install (4.5% of people expressed intent to install Cash App) in the coming months.

Cash App's Growth Potential in this scenario would then be the product of the 38% of consumers interested in Finance apps, the 36% of consumers aware of Cash App, and the 4.5% of those customers who didn't have Cash App but expressed intent to install it in the coming months.

Growth Potential is NOT a measure of likely installs as certain behaviors can still impact whether or not a consumer installs an app, but rather a measure of the “top of the customer funnel” for each app at a given point in time, and as such, can be a leading indicator of potential app growth.

# BRAG Methodology

## The BRAG Methodology

The BRAG Index is derived from combining two data sources:

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App install volume sourced from Apptopia's Performance Data.

From these two data sources, we've developed two new growth metrics:



**BRAG Index:** The BRAG Index compares an app's end-of-quarter install volume (from Apptopia) against its category peers with comparable Growth Potential at the beginning of the quarter. If an app had installs that were equal to others with similar Growth Potential, the app's BRAG Index would be around 1. Apps with scores higher than 1 outpaced their competition while apps with scores lower than 1 delivered fewer installs than their peers.

THE  
**BRAG  
INDEX**



Leaders & laggards in a brand-centric world

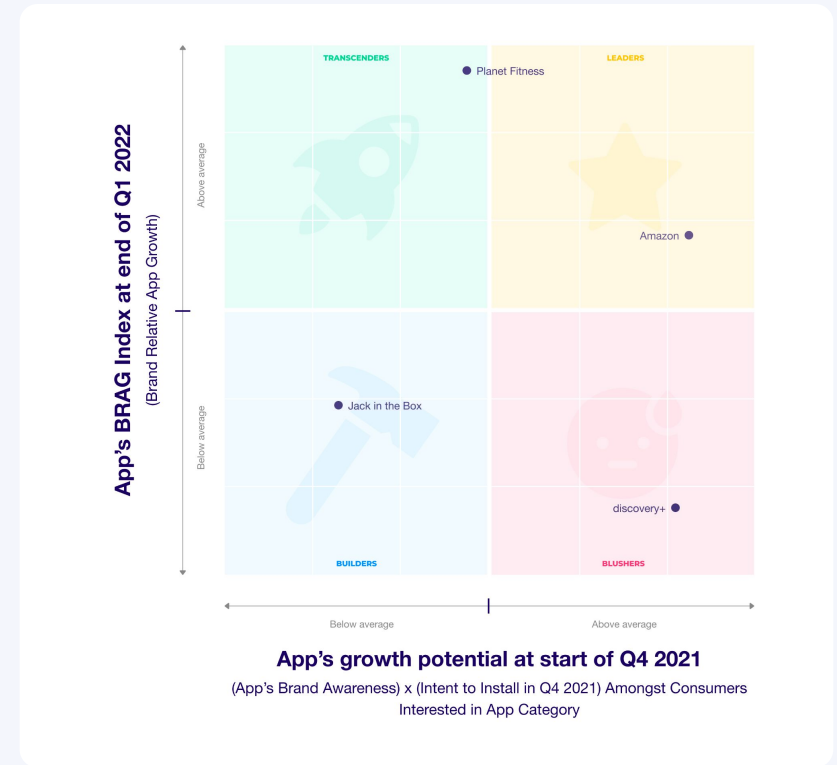
# The BRAG Box

We use Growth Potential and our BRAG Index to create a **BRAG Box** for each category.

Growth Potential, a measure of Brand Funnel size, is plotted along the X-axis, with brands with lower than average Growth Potential to the left side and higher than average Growth Potential to the right.

The Y-Axis plots BRAG Index with those towards the top of the box generating above average installs compared to peers of similar Growth Potential (i.e., a BRAG Index > 1) and those in the bottom half having lower than average installs compared to their peers (i.e., a BRAG Index < 1).

Combining Growth Potential and BRAG Index then creates four BRAG segments: Leaders, Transcenders, Builders and Blushers as defined on the next page.



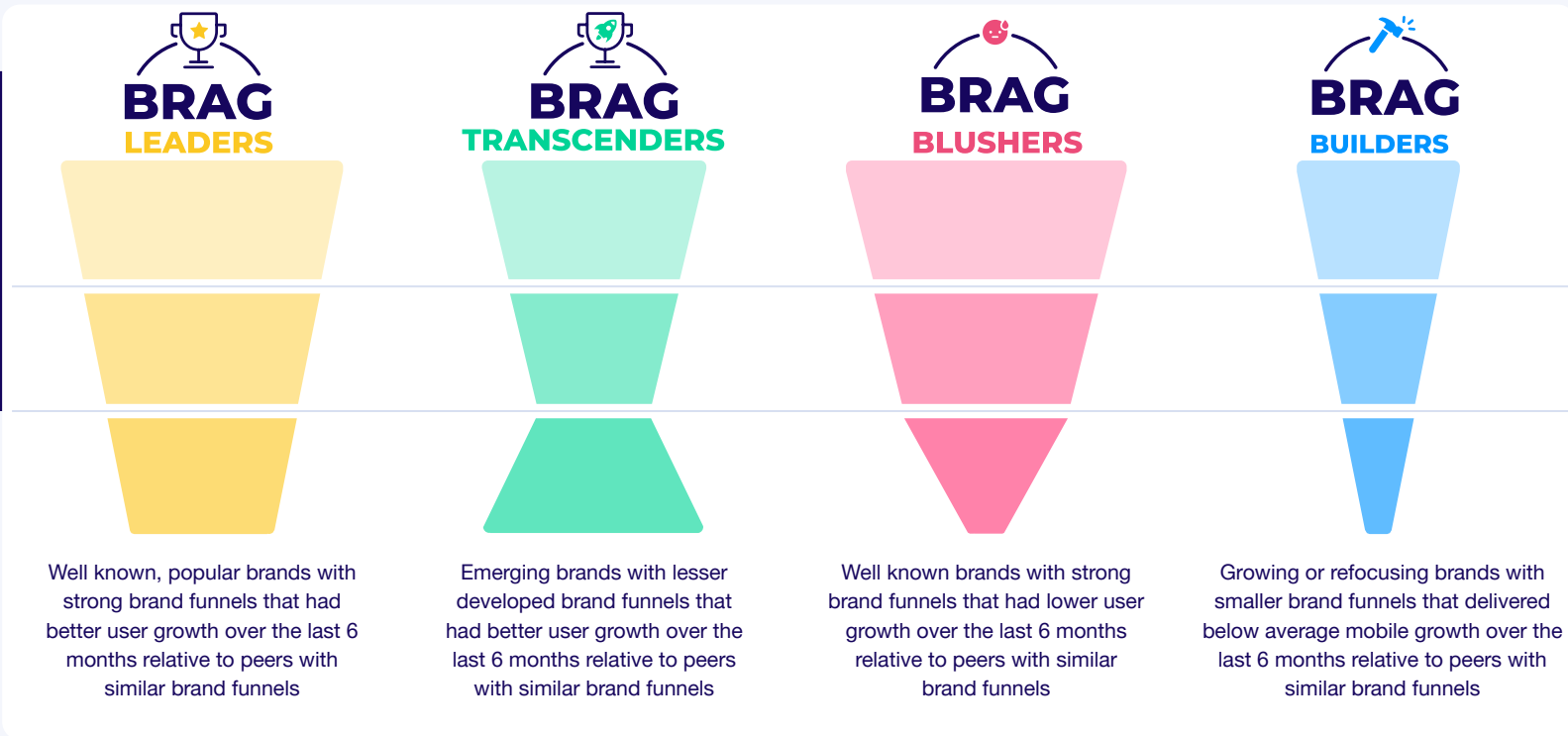
# The BRAG Box Quadrants

Through this lens, we're able to place apps into 4 quadrants to help us identify:

**GROWTH POTENTIAL**

Start Of Period Awareness

Start Of Period Install Intent















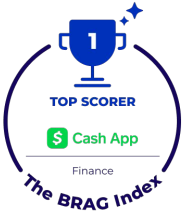
# Top BRAG-gers




## Top 10 Overall BRAG-gers

- 1 Cash App 
- 2 Crypto.com 
- 3 Coinbase 
- 4 NewsBreak 
- 5 Spotify 
- 6 Planet Fitness 
- 7 Yelp 
- 8 Google Pay 
- 9 Flo Period Tracker 
- 10 Workout Planner 

## Top BRAG-ger for Each Category



1  
TOP SCORER  
  
Finance  
The BRAG Index



1  
TOP SCORER  
yelp  
Food & Drink  
The BRAG Index



1  
TOP SCORER  
  
Health & Fitness  
The BRAG Index



1  
TOP SCORER  
  
Music & Audio  
The BRAG Index



1  
TOP SCORER  
  
News  
The BRAG Index



1  
TOP SCORER  
SHEIN  
Shopping  
The BRAG Index



1  
TOP SCORER  
tubi  
Streaming Video  
The BRAG Index

# Why They Can Brag

Partnerships paved the way, followed by product innovation.

In a post-IDFA world, our top BRAG-gers thought about offline partners and ecosystem integrations that would position their app in front of audiences at opportune moments.



Offline **Partnerships** that won included presence and promotions with sports teams, games, athletes, and music artists. Tapping into a partner's fan power was key. Partnerships with organizations that do not have fans did not convert installs (e.g., corporate partners).



Mobile Ecosystem **Integrations** included product development that positioned apps on operating systems, blockchain, payments platforms, and on-device integration with carrier and/or handset manufacturer smartphones.

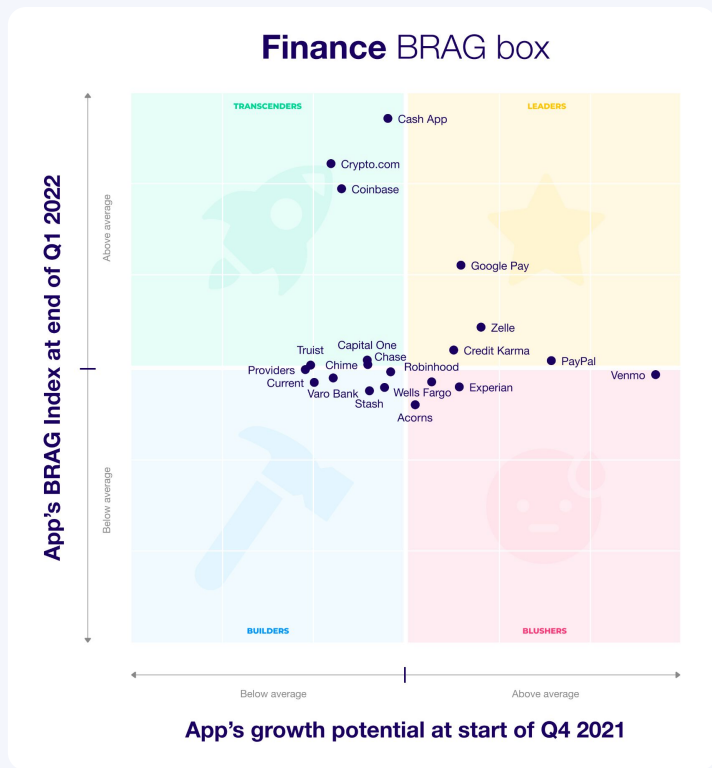


**Product-Led Growth** – specifically features that make the experience more valuable to users on each return visit – were built in and increased the likelihood of grassroots growth. This came in the form of unique currency, experiences, entertainment, or information. As interest in cryptocurrency has skyrocketed, apps that are building a Web3 experience outperformed peers.

BRAG INDEX

# Category Pages

# Finance Overview



## CATEGORY GROWTH POTENTIAL

Awareness and Install Intent for apps in the Finance category ranked in the middle of the pack compared to other app categories, meaning the Growth Potential for this category also landed in the middle of the seven categories. In Q4, cryptocurrency app installs in the U.S. had grown 645% YoY, and accordingly, apps that did not offer or market crypto posted lower end-of-Q1 BRAG Index scores.



## WHAT'S IN THE BOX

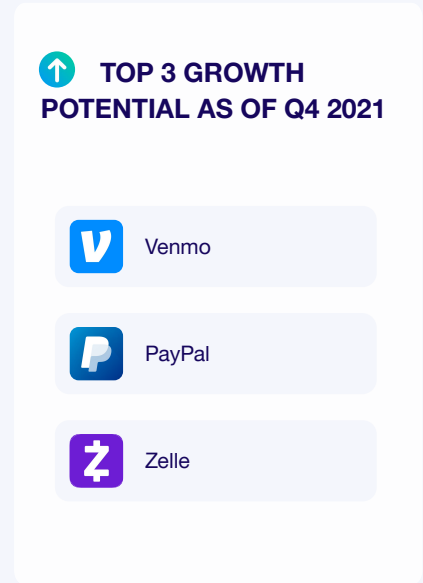
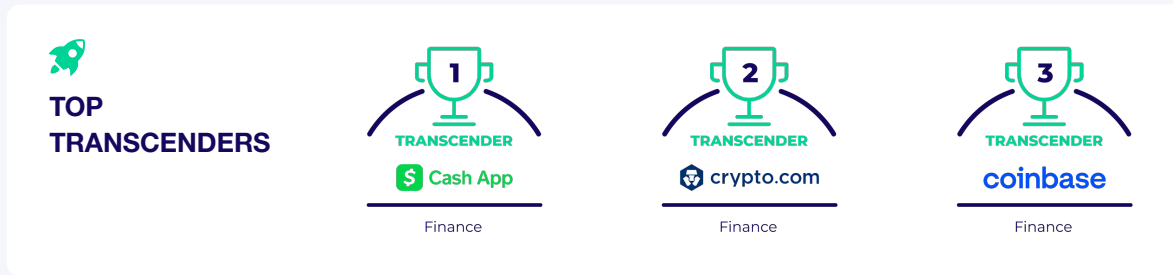
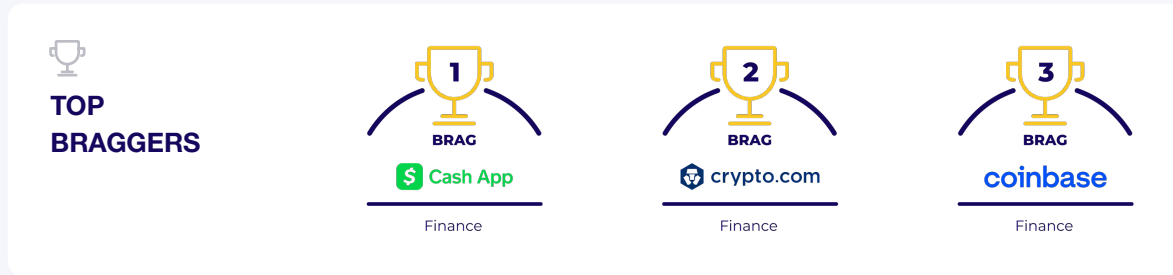
Finance had the highest amount of apps in the top half of the BRAG Box (11), and tied with Health & Fitness for the highest number of Transcenders (7).

When we analyze the Transcenders' success strategies in the following slides, each made a significant investment in increasing Awareness following the survey.

This indicates that Brand Awareness is important to this category – likely because a certain level of trust is required before people want to store or move their financial assets on a platform.

# Finance BRAG BOARD

Within the Finance Category, the top Transcenders also were the top BRAG scorers, indicating that this could be a fast-evolving category with emerging brands gaining ground on the leaders. With such an open playing field in a transformative app category, the next evolution of the BRAG report could look different for this category.



# Finance Highlight



## BRAG SUCCESS STRATEGY



OFFLINE PARTNERSHIPS



PAYMENT PLATFORM PARTNERSHIPS

## What's To Brag About

Six months ago, less than 40% of financial app users were aware of Cash App, and even fewer intended to install the app. Despite this, Cash App delivered more than 30M installs – nearly double the amount of the second most-downloaded in the category (PayPal at 17M).

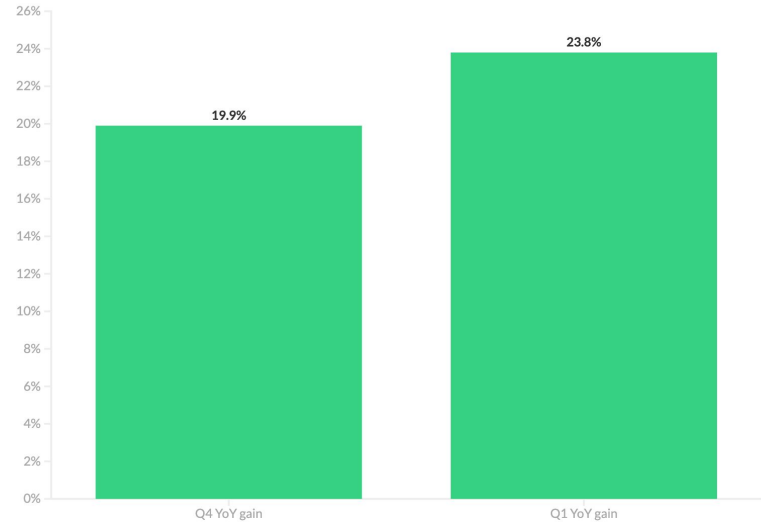
## Why They Can Brag

In November of 2021, Cash App widened its total addressable market to teens and picked the right business development and marketing partnerships to attract the age group.

To announce the launch, Cash App partnered with TikTok star Jojo Siwa, who ran a social media sweepstakes. Unrelated to the teen launch, it also aligned with crypto and football fans at this time when it sponsored paying Odell Beckham Jr.'s salary in crypto.

By integrating with a financial institution, teens could get a debit card - complete with cash back rewards at a list of partnership merchants. With a broad addressable market, Cash App also leveraged distribution on new devices to make their apps available to millions of new users.

U.S. Downloads Percentage Change



# Finance

## Other BRAGs of Note



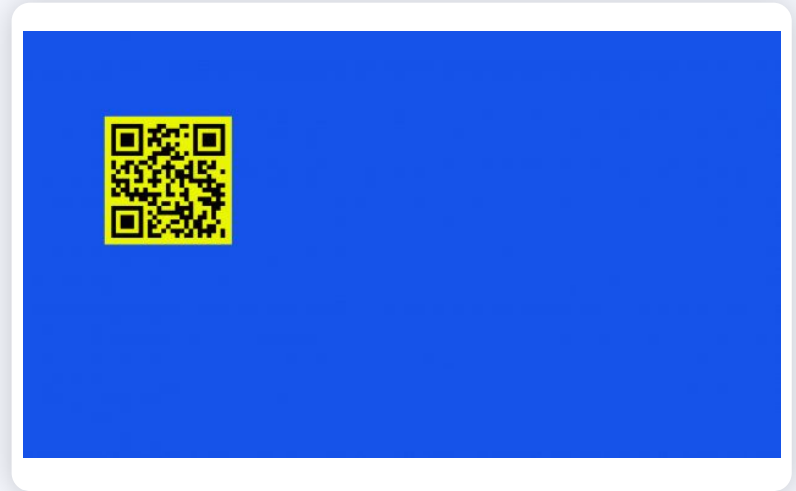
At the start of Q4 2021, Crypto.com's Awareness was a mere 15.5% within Financial App users – less than half the category average of 38%. In another example of sports fans power, Crypto.com became the jersey sponsor for the NBA 76'ers and shortly after in December of 2021, purchased the naming rights for the famed Staples Center in Los Angeles, now the "Crypto.com Arena," in one of the biggest deals in history.



Similar to Crypto.com, Coinbase also had below average Awareness (22%) and low Install Intent (3.4%) at the beginning of Q4, resulting in low Growth Potential. Then, Coinbase ran the most successful UA campaign, via Superbowl commercial, of any of the cryptocurrency apps, according to App Store rank following the big game in February.



Top investing app Acorns may have stumbled with installs over the past six months due to the company putting focus and money towards going public with a SPAC merger. Consumer interests had also been shifting away from traditional retail investing and toward crypto investing.



# Food & Drink Overview

## Food & Drink BRAG box



App's growth potential at start of Q4 2021



## CATEGORY GROWTH POTENTIAL

In Q4, pandemic concerns still had consumers in an ordering mindset driving Food & Drink apps to the second highest Growth Potential of all categories, with the highest average Install Intent and second highest average Awareness. With pandemic restrictions easing, Growth Potential may be different when we look at our next report.



## WHAT'S IN THE BOX

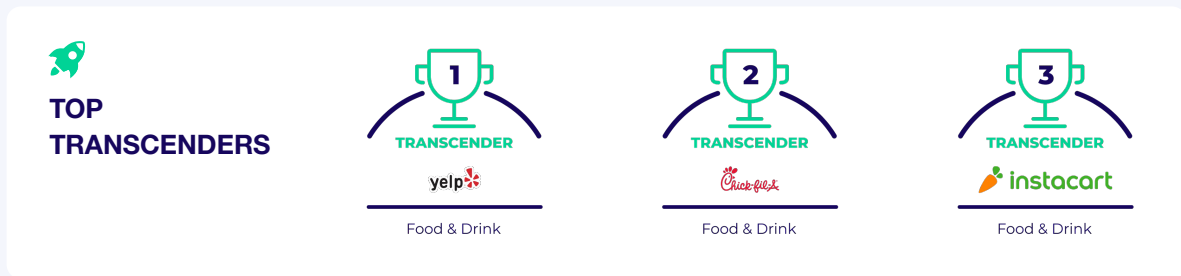
Many well known brands meant much less variability in terms of Awareness - allowing Install Intent to have a bigger impact on Growth Potential.

The Install Intent of QSR leaders Burger King (11%), McDonald's (10%), Wendy's (10%), and Dunkin' (9%) were all well above the category average of 7%, but only a few of these translated this advantage into new installs.



# Food & Drink BRAG BOARD

Yelp ended up with the top BRAG score in this category and was labeled as a Transcender. This was due to external forces as our Growth Potential survey was taken with coronavirus cases surging. However, installs grew as more restaurants opened for business and the general public became more comfortable with the thought of going out to eat.



# Food & Drink Highlight



## BRAG SUCCESS STRATEGY



OFFLINE PARTNERSHIPS

### What's To Brag About

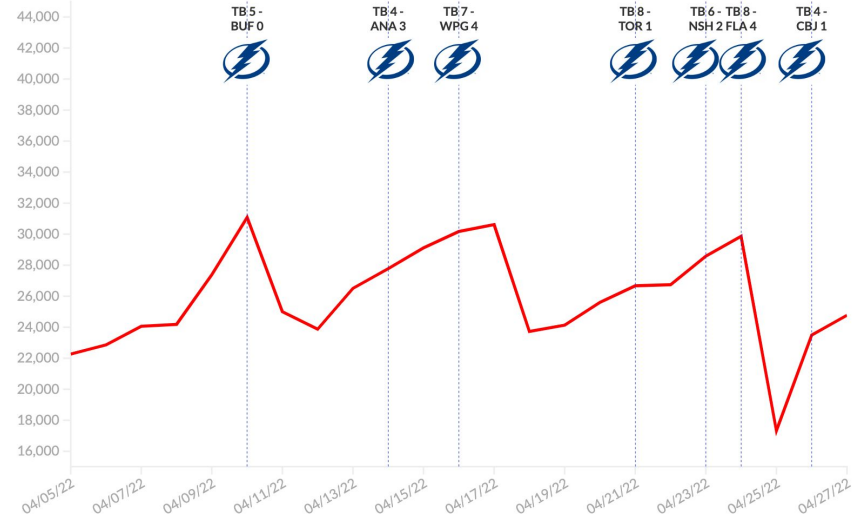
Chick-fil-A had the fifth lowest Growth Potential score in the Food & Drink category but ended up pulling in more downloads, 4.5 million specifically, than apps with similar Growth Potential.

### Why They Can Brag

Getting on fans' good side, Chick-fil-A went local and gave away free chicken sandwiches if home teams won their games. The requirement? Have the Chick-fil-A app downloaded to your phone with location services on.

Chick-fil-A scores new installs from NHL Lightning fans after team wins

■ Chick-fil-A Downloads, U.S.



# Food & Drink

## Other BRAGs of Note



The Taco Lovers Pass already had loyal customers bypassing the border and running to the app to obtain a free taco every day for \$10/month - allowing the chain to surpass their peers during our research period.



At the beginning of our research period, an integration with Apple Car Play enabled Dunkin' rewards members to order in their cars - driving up growth and loyalty and allowing Dunkin' to dunk on their peers.



A product-led innovation offering 30 minute deliveries for prepared foods (sushi, salads, sandwiches) from supermarkets like Kroger and Publix allowed Instacart to check out of our research period ahead of its peers.

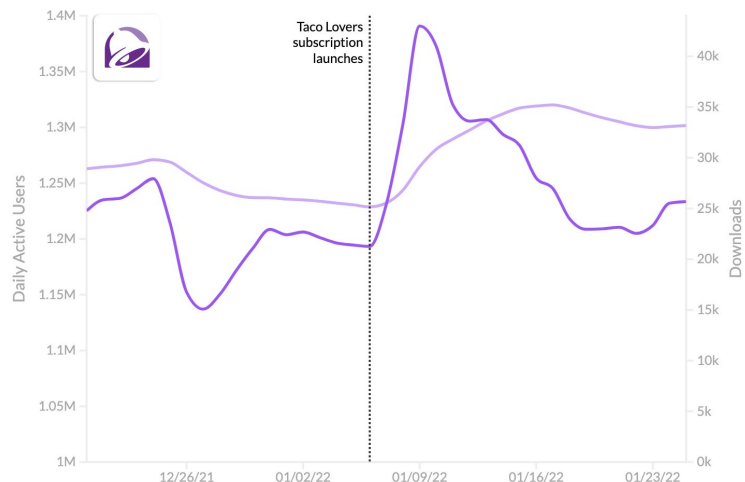


Despite higher Install Intent, an inability to keep up with rivals DoorDash and UberEats' innovations, like [expanding to grocery stores](#), left Grubhub behind in the food delivery battle. Recently, Just Eat Takeaway announced intentions to sell the service only one year after purchase.

### Taco Bell gains daily users from its subscription service

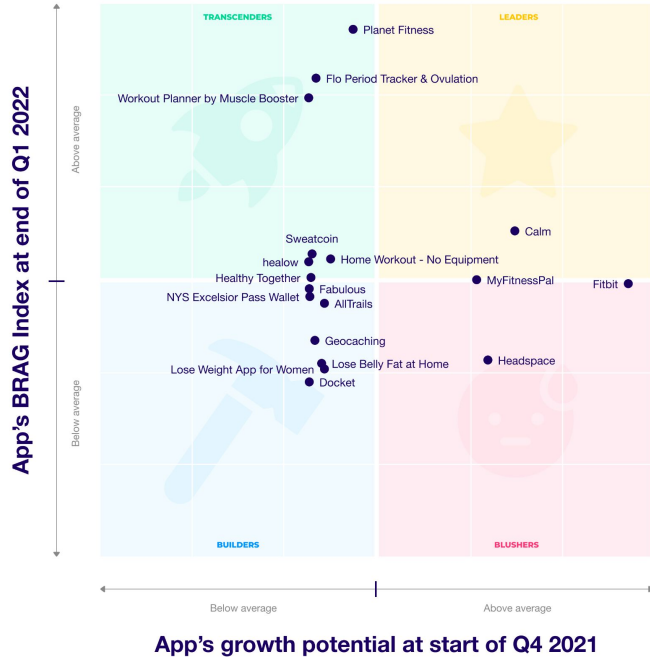
Daily downloads and active users, U.S.

■ Downloads ■ DAU



# Health & Fitness Overview

## Health & Fitness BRAG box



## CATEGORY GROWTH POTENTIAL

Health & Fitness apps had the lowest average level of Awareness (16%) and the second lowest average level of Install Intent (2.5%) and accordingly, had the lowest Growth Potential. The low levels of Awareness indicate the sheer volume and variety of startups in the category, especially following the boom of apps created during lockdown by instructors and studios.



## WHAT'S IN THE BOX

Health & Fitness apps tied with Finance for the highest amount of Transcenders (7). Unlike Finance, however, Awareness is not central to a user's decision to install in this category.

Planet Fitness and Fitbit ranked in the top five for Awareness, but did not have high Intent to Install. Conversely, Calm, Headspace, and MyFitnessPal ranked high in Awareness and Intent to Install, but only Calm converted that Intent to growth.

In the following slides, Transcender stories revolve around product-led growth strategies.

# Health & Fitness BRAG BOARD

Fitbit's app usage is driven by device sales, which decreased 30% in 2020. While we cannot see device sales in 2021 due to Google's acquisition of Fitbit, app installs show that short of seasonal spikes for 2021 and 2022 New Year's Resolutions, Fitbit's app growth has declined since June 2020.



## TOP BRAGGERS



## TOP TRANSCENDERS



## TOP 3 GROWTH POTENTIAL AS OF Q4 2021



Fitbit



Calm



Headspace

# Health & Fitness Highlight



## BRAG SUCCESS STRATEGY



### Product-Led Growth

## What's To Brag About

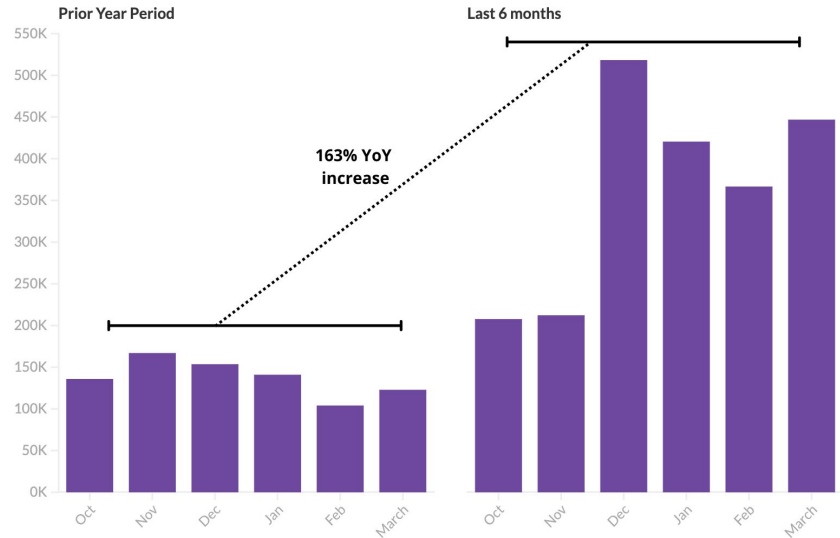
Sweatcoin had the second lowest Intent to Install score, with less than 1% of the people aware of it expressing interest. Curiously though, Sweatcoin raked in more installs than Headspace - the app with the highest Intent to Install.

## Why They Can Brag

Sweatcoin started in 2015 with a vision of Web3 before the world was ready for it. Instead, it outwardly messaged the simple exchange of steps for brand currency and has captured consumer interest through the gamification of physical health: for every 1,000 steps, users earned \$0.95 in sweatcoin. In 2021, as cryptocurrency and Web3 interest accelerated, the app started to talk about its plans to tokenize its coins. Its brand assets are Web3-forward and geared toward those with a decentralized preference: the \$SWEATECONOMY community has a Discord server, subreddit, telegram group, and twitter – all the social networks that celebrate pseudonyms and private identities.

### Sweatcoin hits a new stride during this year's New Year resolution spike

■ Downloads, U.S.



# Health & Fitness

## Other BRAGs of Note



### Planet Fitness TRANSCENDER

Planet Fitness was the only well-known app to have a low Intent to Install corresponding. Despite this, it garnered the most installs in the whole category due to product-led growth. When it developed a mobile check-in feature in the app and turned it into a key card, it converted the downloads of all its members returning to physical locations in the last six months.



### Flo Period & Ovulation Tracker TRANSCENDER

Flo Period Tracker rebranded in August 2021 as a fertility and ovulation tracker and developed predictive analytics within the app to help couples plan for pregnancy. Following the rebrand, it raised a Series B of \$50M for its machine learning development and social media ads across Instagram, Snapchat, and TikTok. Since settling with the FTC in June 2021 for selling data to Facebook, so it could target timely ads to women on their periods or expecting, it has stayed away from press.

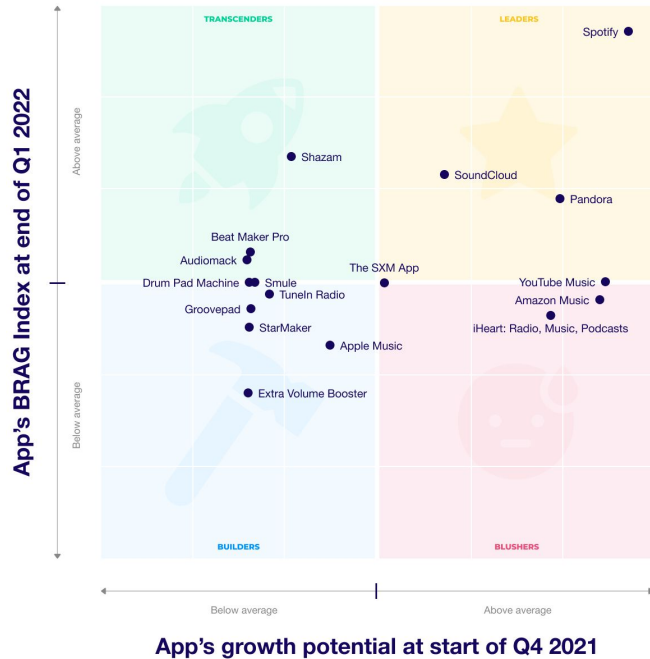


### Headspace BLUSHER

In 2021 Headspace focused its attention on 'mental health at work' and winning corporate contracts. Corporate partnerships are excellent for generating awareness and even intent to install among tens of thousands of employees (in Headspace's case) who have the subscription paid for by work, but Growth Potential will fail to convert to installs if people are not educated about the benefit, which then is in the hands of HR. Though Calm also focused on corporate contracts, its consistent stream of athlete, actor, and musical artist endorsers must have pulled through its star power.

# Music & Audio Overview

## Music & Audio BRAG box



## CATEGORY GROWTH POTENTIAL

Music & Audio Growth Potential average ranked third, below Streaming Video and Food & Drink. Awareness of apps ranges from 1% (Audiomack) to over 80% (Pandora and Spotify). Similar to Streaming Video, competition to be consumers' choice subscription is fierce and dominated by well known brands: YouTube Music, Amazon Music, Spotify, Pandora, iHeart Radio, and Apple Music had the strongest Brand Awareness.



## WHAT'S IN THE BOX

Intent to Install was relatively low across the category, at an average of 4%, so Awareness was the key component to an app's Growth Potential.

That said, the highest ranking in terms of Awareness - Spotify, Soundcloud, Pandora, YouTube, Amazon, and iHeart Radio - also had the higher end of Intent, and all but two apps met or exceeded the opportunity.

When looking at Transcencer initiatives after the survey, brands seemed to focus on both strategic placement that would boost Awareness and creating unique value or functions within the app that would encourage installs.

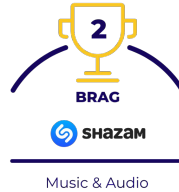
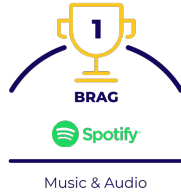


# Music & Audio BRAG BOARD

Despite high Awareness from well known parent companies Amazon and YouTube and high Intent to Install perhaps from free trial or bundled services offers, the Amazon Music and YouTube Music apps fell short of expected downloads.



## TOP BRAGGERS



## TOP TRANSCENDERS



## TOP 3 GROWTH POTENTIAL AS OF Q4 2021



Spotify



Youtube Music



Amazon Music

# Music & Audio Highlight



## BRAG SUCCESS STRATEGY



**ON-DEVICE  
INTEGRATION**



**PRODUCT-LED  
GROWTH**

## What's To Brag About

Shazam nearly doubled its Q4 installs in Q1. This breakout growth ranked the app fourth highest in new installs, coming in above YouTube Music (a win over Google that its parent company Apple can brag about).

## Why They Can Brag

Three years post-acquisition, Apple finally made a move to show off Shazam. One could say that a partnership with Apple is one of the most powerful of all. With the launch of iOS 14.2 in Q4 2021, Apple added a Shazam toggle to the Control Center on OS devices to allow for easier access – and discoverability outside of the App Store. Feature enhancements including content discovery for concerts, TV and movie recognition, plus integrations for Spotify and Snapchat, expanded Shazam's network and relevance within the music streaming ecosystem.



# Music & Audio

## Other BRAGs of Note



**Audiomack**



TRANSCENDER

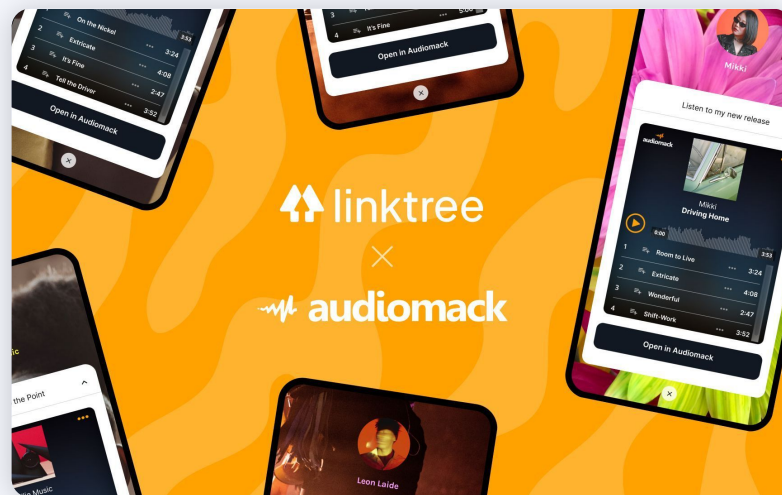


**PRODUCT-LED  
GROWTH**

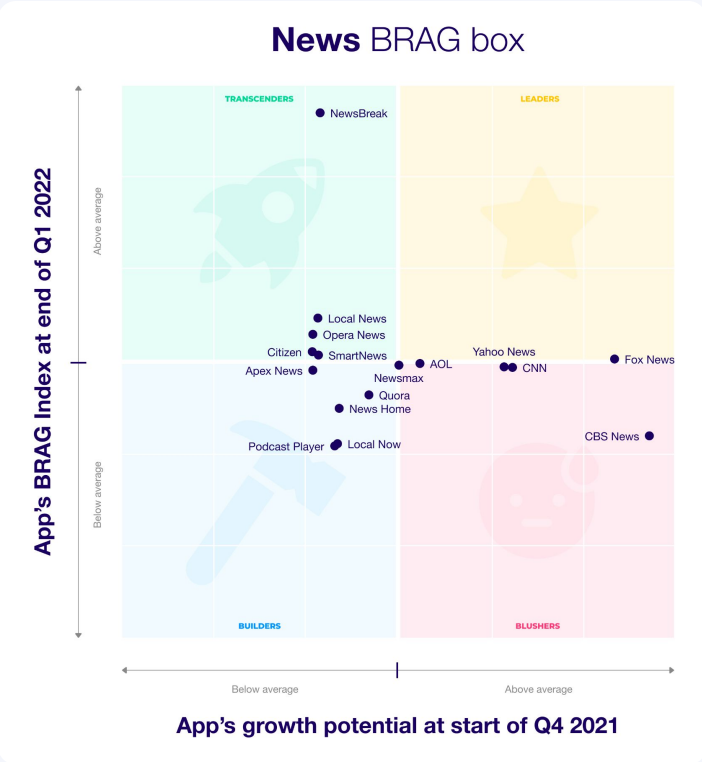
Audiomack delivered over 4 million installs despite registering 0 Intent to Install in our survey. In December 2021, it launched its 'Supporters' feature and received press attention. It was a new revenue stream opportunity for independent artists that also opened up a channel for relationships between artist and fans.

Across app categories, creator economy apps exploded in popularity in 2021, and Audiomack enabled creator-fan relationships in a way that Soundcloud did not. As a free platform for both sides of the marketplace, artists have no reason not to crosspost music there and reach fans that want to stream for free - or like the social components.

Audiomack integrated with Linktree to make it easy for artists to post their Audiomack links from Instagram and TikTok profiles and benefited from that exposure.



# News Overview



## CATEGORY GROWTH POTENTIAL

Despite many well known TV and media brands, news apps average near bottom levels of Awareness and Intent. The News category was a unique one in our research with several smaller apps outperforming Leaders in the space - not only in BRAG score but in actual installs.



## WHAT'S IN THE BOX

Out of the six companies with high Growth Potential in the group, only two managed to get BRAG scores that put them in the Leader quadrant: Fox News and AOL - and even these were only slightly above the 1.0 threshold.

This split confirms that people are gravitating to news aggregators that give a mix of different sources that they can read rather than one source of news that could be biased.

Sure enough, the Top BRAG-gers and Transcenders were a mix of news aggregators and the user-generated content news app Citizen.

# News BRAG BOARD

News aggregators outperformed Fox News, CBS, and CNN despite survey results expressing high Awareness and Intent to Install for the individual publishers. This could be a result of consumer conditioning by Apple News and Flipboard, the default on-device news aggregators for iOS and Android respectively.



## TOP BRAGGERS



 NEWS BREAK

News



 Local News

News



 Opera News

News



## TOP TRANSCENDERS



 NEWS BREAK

News



 Local News

News



 Opera News

News



## TOP 3 GROWTH POTENTIAL AS OF Q4 2021



Fox News



CBS



CNN

# News Highlight



## BRAG SUCCESS STRATEGY

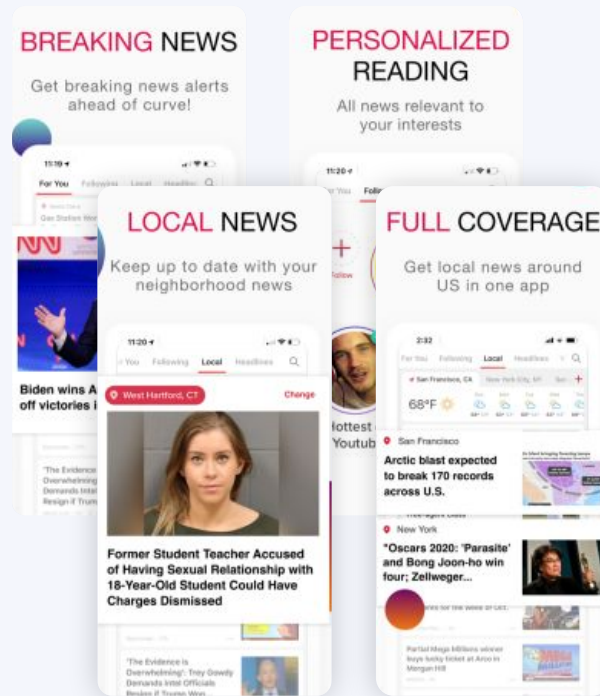


### What's To Brag About

Despite low Brand Awareness and Intent to Install, NewsBreak not only had the top BRAG score, but was the most-downloaded news app overall. When every iPhone and Android comes with a news aggregator that you don't have to install, having over 7M installs is impressive.

### Why They Can Brag

By partnering with companies that had platforms that worked with wireless carriers and OEMs, NewsBreak paired a preload strategy with a simple user interface to break-through to customers, despite low Awareness and Intent ratings.



# News

## Other BRAGs of Note



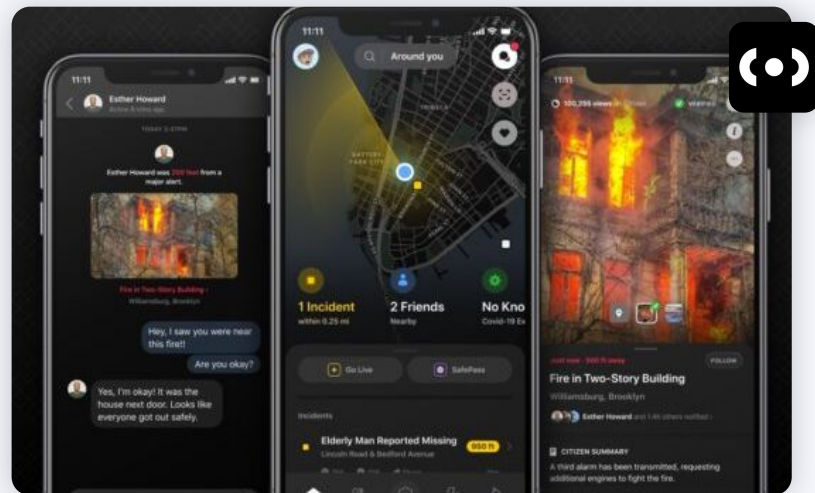
User-generated content was what drove personal safety app Citizen to stand above its peers during our research period - a steady strategy since the app gains value from a larger network and participation (along with the promise of original content).



This news aggregator “smartly” beat out its peers thanks to an integration with carriers and OEMs and an ability to personalize their app to the user based on specific stories, rather than just providing an “everything” news feed.

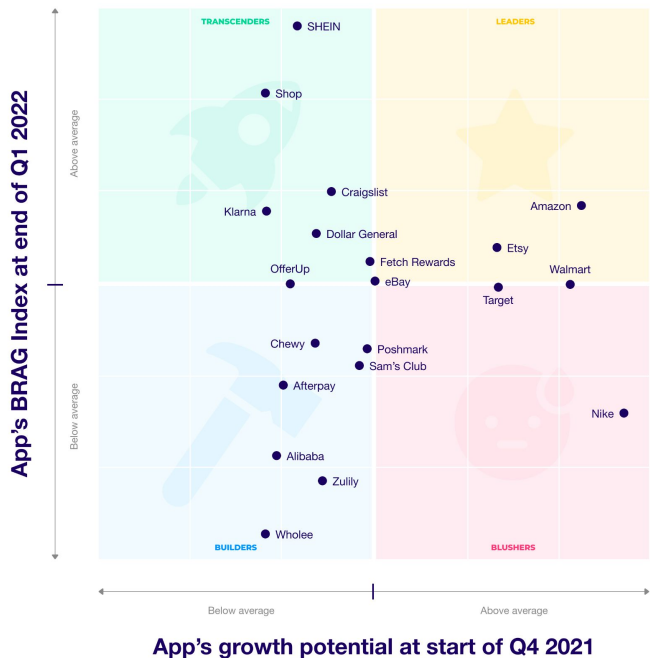


Like many other well known brands, CNN struggled to take advantage of its Growth Potential and stopped CNN+ one month after its launch. Another factor could be the desire to push its mobile news to news aggregators rather than growing its own app.



# Shopping Overview

## Shopping BRAG box



## CATEGORY GROWTH POTENTIAL

A low average Growth Potential was fueled by the lowest average Intent to Install score (2.2%) across all categories, driven by a market split between a few large, do-everything retailers and smaller specialty apps. With inflation rising, low cost retailers may continue to transcend when we look at our next report.



## WHAT'S IN THE BOX

With low Intent scores, Brand Awareness played a key role for the Leaders quadrant, with large retailers such as Walmart and Amazon generating very high numbers of downloads due to their strong brand.

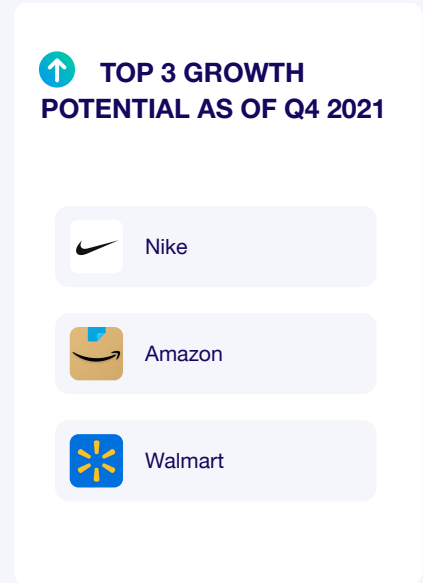
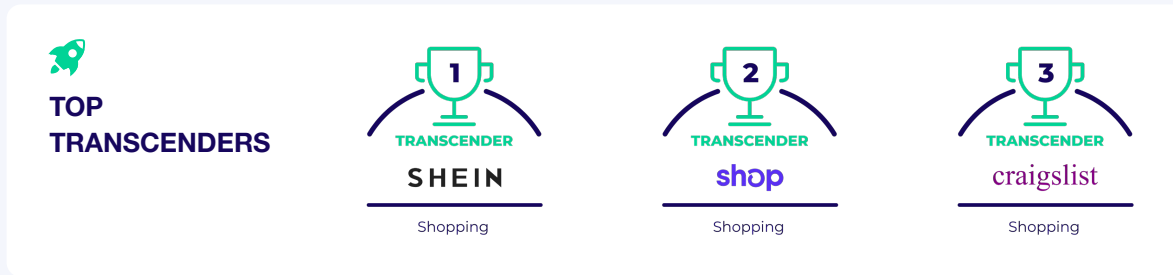
Several Transcenders in this category had a common lure - saving money. Craigslist, Dollar General, Klarna, and Fetch Rewards all offer a different angle on saving cash.

The Shopping category had the highest number of Builders, with eight. Creating partnerships where the app can be presented at a moment of consumer need was an effective way to build growth.



# Shopping BRAG BOARD

SHEIN shined with the highest BRAG score — breaking through with high install volumes despite low Awareness and Intent scores. When push came to shove, it managed to tally the third highest number of installs of any Shopping app analyzed. The company is now valued at \$100 billion thanks to its latest funding round in April 2022. It was valued at just \$15 billion in 2020. Will that bump up its Growth Potential for our next period?



# Shopping Highlight



## BRAG SUCCESS STRATEGY



### PAYMENTS PARTNERS

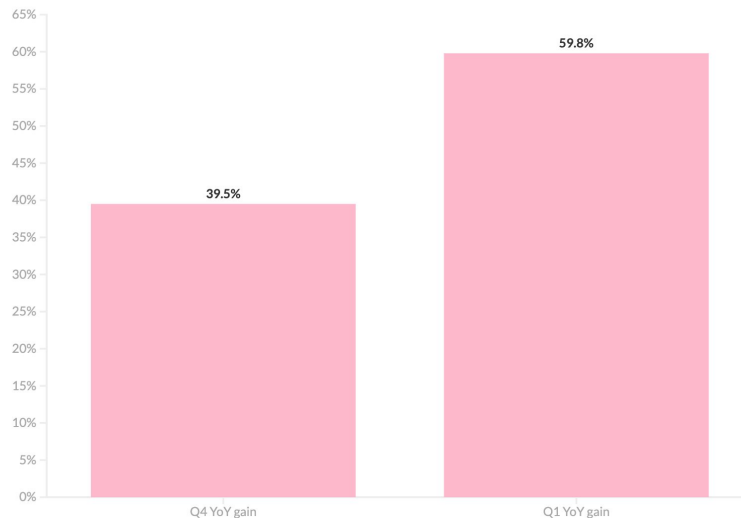
## What's To Brag About

With Awareness at 16% (well below the category average of 41%) in the beginning of our research period, Klarna still ended up with the fifth most downloads (10 million US customers) among shopping apps.

## Why They Can Brag

Smart partnerships with Stripe and Wix enabled merchants to easily integrate Klarna into the checkout process. This put them forth as an option to hundreds of thousands of shoppers that would download the app for installment payments for purchases they were already making.

U.S. Downloads Percentage Change



# Shopping

## Other BRAGs of Note



#SHEINhauls trended on TikTok and YouTube as celebrity influencers would try on whole closet's worth of their clothing that they were able to get at affordable prices.

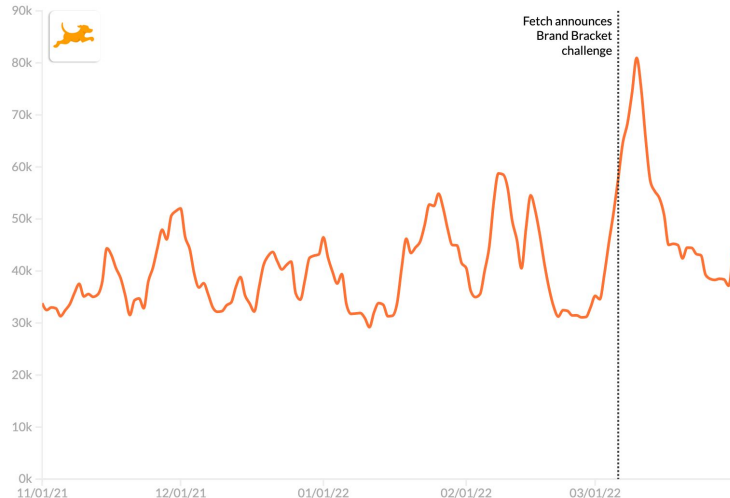


Right before our study period, Fetch expanded its offering to include participating restaurants and also did a Brand Bracket March Madness promotion that enabled the receipt reward app to soar above its peers.



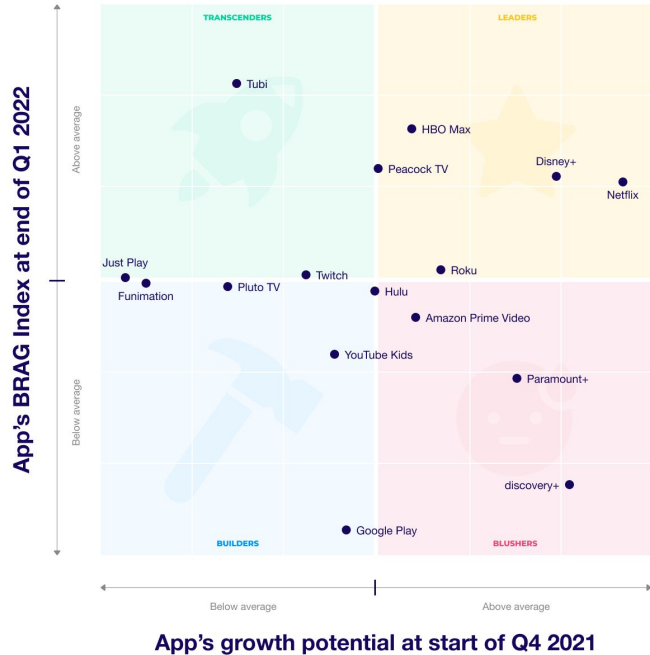
Nike had the highest Growth Potential score, thanks to one of the few strong Intent scores in the category, but despite a strong Q4, the brand suffered in Q1 with a larger decrease in install volume than any of its peers.

Daily downloads, U.S.



# Streaming Video Overview

## Streaming Video BRAG box



## CATEGORY GROWTH POTENTIAL

With Q4 pandemic concerns still high, consumers were well acquainted with their streaming video platforms, giving them the strongest Growth Potential numbers due to their high levels of both Brand Awareness and Install Intent. Intent to Install may lag in our next report with pandemic restrictions easing.



## WHAT'S IN THE BOX

The Blushers, apps that had high Growth Potential but whose installs underperformed, include Amazon Prime Video, Paramount+, and Discovery+. Subscription fatigue and free (ad-supported) options with desired content played a role.

The best BRAG scores had the best content. There are only so many subscription dollars to go around, and while a streaming platform's UI plays a role in complaints on social media, content available is how consumers make their purchasing decisions.

# Streaming Video BRAG BOARD

Tubi was the only Transcender in our top three, over-delivering in a tubular way, placing it at the top of our BRAG Index for Streaming Video. Unlike other categories, large names still have clout here with big name Leaders occupying spots 2-6 in our rankings. The streaming wars are relatively new, however, compared to the other categories.



## TOP BRAGGERS

1  
BRAG  
**tubi**  
Streaming Video

2  
BRAG  
**HBOmax**  
Streaming Video

3  
BRAG  
**peacock**  
Streaming Video



## TOP TRANSCENDERS

1  
TRANSCENDER  
**tubi**  
Streaming Video

2  
TRANSCENDER  
**twitch**  
Streaming Video

3  
TRANSCENDER  
**JustPlay**  
Streaming Video



## TOP 3 GROWTH POTENTIAL AS OF Q4 2021



Netflix



Discovery+



Disney+

# Streaming Video Highlight



## BRAG SUCCESS STRATEGY



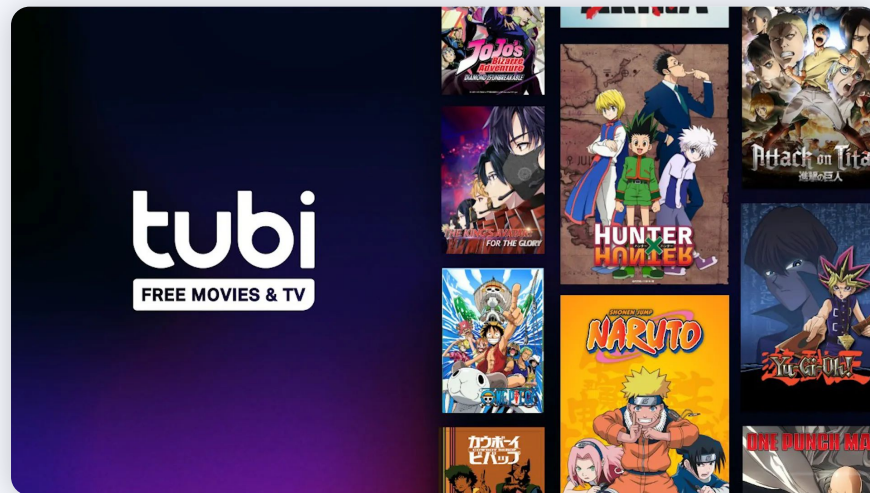
### WINNING CONTENT

## What's To Brag About

Well - it's the top BRAG score in a category that averaged the highest Growth Potential across all seven categories! The app had the third lowest Growth Potential but still landed 295% more downloads than Discovery+, which registered the highest Growth Potential.

## Why They Can Brag

Catalog it and they will come. Tubi is well stocked with animes, which Apptopia Review intelligence [found in high demand](#) when looking at app reviews across top streaming platforms. "Anime" is the third most used key term in Tubi reviews, and Apptopia shows the key term to have a positive Impact Score on Review Sentiment.



# Streaming Video

## Other BRAGs of Note

### **Twitch** TRANSCENDER

Smart partnerships with Nintendo's Switch and Microsoft's XBOX allowed the live streaming platform to increase its reach, and with the holidays providing a boom in new games, entice new users to download the app.

### **Peacock TV** ★ LEADER

An ad-supported tier gave NBC's streamer a lower barrier to install than its peers. In addition, its ability to have an exclusive partnership with the Beijing Winter Olympics allowed Peacock to skate up our BRAG Index.

### **Discovery+** BLUSHER

While fine with app Awareness, in a space where strong original content drove winners over our research period, Discovery+ could not keep up - and will merge with HBO Max where its content can shine in a user retention role.

### **Netflix** ★ LEADER

Recent news might suggest Netflix was a Blusher, but the streaming giant did take advantage of its Growth Potential during our period. Installs don't necessarily mean new subscribers - particularly if people are using another account. We'll have more on Netflix in a follow up blog coming soon.

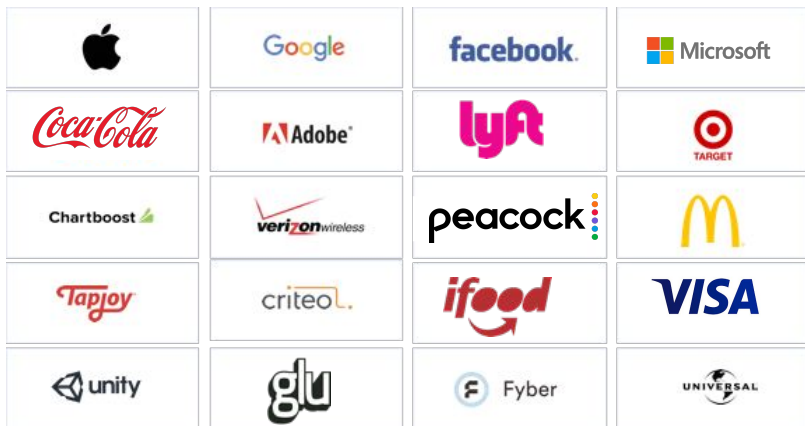


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### Data Points

- 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



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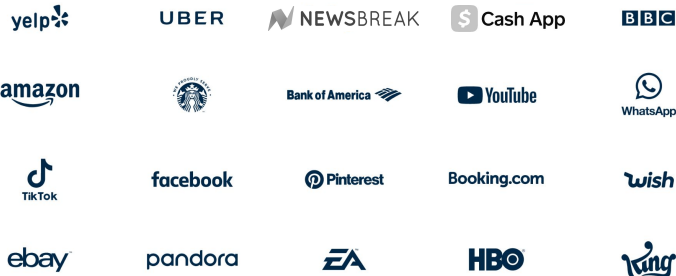


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- Demand Side Platform
- Mediation
- Marketplace
- Offerwalls



THE  
**BRAG  
INDEX**



Leaders and laggards in a brand centric world

