

▶ **Reelgood** for Business

Q4 2020

VOD Streaming Report



As people around the world continue to deal with the ongoing pandemic and all of its implications, streaming remains one of the few industries that continue to flourish and thrive. In this report, new data from Reelgood's VOD Viewing Insights product shows how consumers in the United States responded to unprecedented growth in the number of streaming services out in the market and the rise of PVOD in Q4 2020. Get exclusive insight into the top VOD platforms as well as the fastest growing VOD service types based on their shares of streams and engagement in the last quarter.

Highlights:

- HBO Max and Disney+ saw significant growth in streaming shares for Q4, with the former likely to overtake Hulu.
- Netflix and Prime Video each lost streaming share points this quarter due to increased viewing activity for other top SVOD platforms.
- *Wonder Woman 1984* holds the honor of having the strongest opening weekend performance on any SVOD platform for the entire fourth quarter, followed by *Soul* and *Borat Subsequent Moviefilm*.
- Tubi TV leads the AVOD pack with a 35% share of overall streams in Q4 for ad-supported services.
- TVOD continues to increase its share of streams, while TV Everywhere exhibits a steady decline.

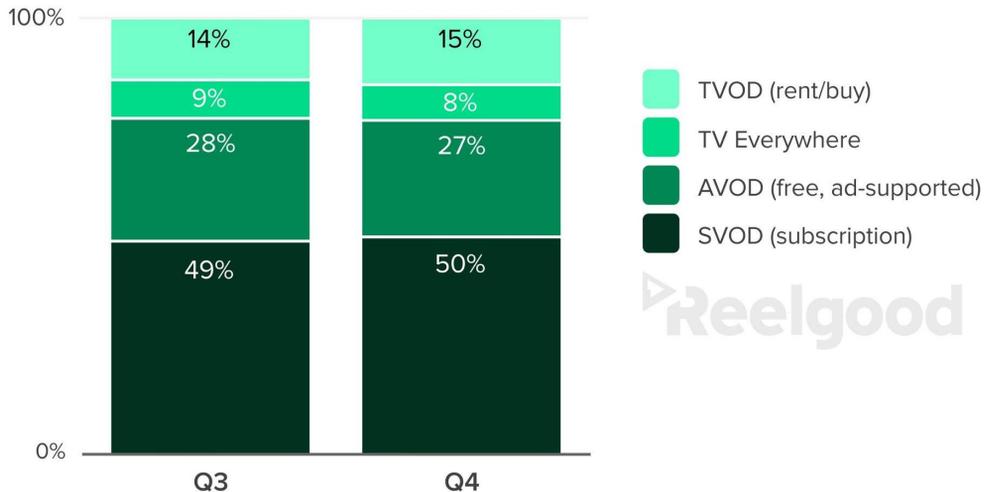
Reelgood analyzes 32 million streaming TV and movie interactions from 2 million monthly active users in the United States for over 150 streaming services, enabled by its award-winning consumer app and industry-leading catalog data. Reelgood's VOD Viewing Insights brings transparency to the VOD market so companies can deliver engaging content, accelerate growth, and navigate a rapidly changing landscape.

TVOD on the rise as SVOD regains its footing

As movie theaters struggle to survive, studios continue to release more of their biggest films straight to VOD in order to reach consumers who remain stuck at home. This year brought about significant growth to the rent/buy market — with titles like *Trolls World Tour* and *Onward* being made available via on-demand channels much earlier than expected because of the pandemic. Streaming shares for TVOD have been on a steady incline since Q1 2020.

Q3 vs. Q4 2020 VOD STREAMING BY SERVICE TYPE

**based on each service type's share of streams from 2 million Reelgood users in the United States*



Source: Reelgood's VOD Viewing Insights product

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SVOD gained ground again this quarter after seeing its share of streams go down during Q3 compared to Q2. Its comeback is notably influenced by an increase in viewing activity for HBO Max and Disney+ from October to December.

Combined AVOD services dropped by a single share point this quarter even as Tubi closed out the year with a strong 35% cut of all ad-supported viewing in Q4, and an increase in engagement was observed for more than a third of all AVOD platforms analyzed.

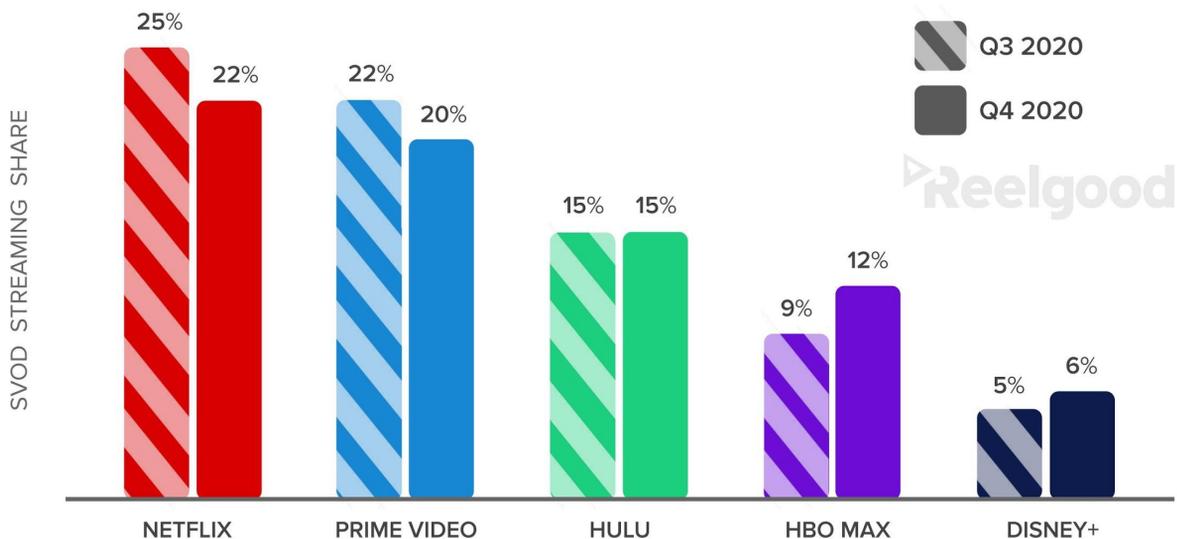
**For continuity, this analysis is based on the same set of services for both Q3 and Q4. It does not include VOD services that were added to the Reelgood platform later than July 1, 2020, but were already previously available to consumers (e.g. Pluto TV, Philo, etc.) For more information on this analysis, contact us at sales@reelgood.com*

HBO Max and Disney+ drive SVOD growth, with the former moving in closer to Hulu

This quarter saw the streaming wars escalate to dizzying levels. HBO Max came out with *Wonder Woman 1984* at the same time it started showing on theaters, Disney+ released the much-awaited *Soul* straight to streaming, *Borat Subsequent Moviefilm* did spectacularly well for Amazon Prime Video, and *Mank* finally premiered on Netflix.

Q3 vs. Q4 2020 TOP FIVE SVOD PLATFORMS

**based on each service's share of SVOD streaming activity from 2 million Reelgood users in the United States*



Source: Reelgood's VOD Viewing Insights product

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While Netflix remains the one to beat, massive growth in viewership across the board in SVOD, and for HBO Max and Disney+ in particular, cut into the streaming giant's share by 3 points.

HBO Max's success in Q4 is thanks to both *Wonder Woman* movies and its catalog of well-loved holiday films like *Elf*, *Die Hard*, and *A Christmas Story*. Its new hit TV shows, *The Undoing* and *The Flight Attendant*, also came through for the service alongside animated series *South Park* and *Rick and Morty*.

The second season of Disney's *The Mandalorian* came just in time to give it a leg up in the competition, along with *Soul*, *The Simpsons*, *Home Alone*, and *Mulan* which was recently made available to stream for free with a Disney+ subscription.

Wonder Woman 1984 had the strongest SVOD opening weekend performance in Q4

Wonder Woman 1984's premiere on HBO Max was met with a stellar reception as it opened to 4% share of streams and engagement, the highest on any SVOD platform for the entire fourth quarter. The film starring Gal Gadot was followed by *Soul* on Disney+ and Prime Video's release of *Borat Subsequent Moviefilm*.



TOP 10 SVOD MOVIE OPENING WEEKENDS IN Q4 2020

- 1  **WONDER WOMAN 1984**
- 2  **SOUL**
- 3  **BORAT SUBSEQUENT MOVIEFILM**
- 4  **HAPPIEST SEASON**
- 5  **HUBIE HALLOWEEN**
- 6  **THE WITCHES**
- 7  **RUN**
- 8  **MANK**
- 9  **THE TRIAL OF THE CHICAGO 7**
- 10  **HILLBILLY ELOGY**

*analysis includes only titles that premiered or were added to SVOD services (e.g Netflix, Disney+, HBO Max, etc.) from Oct 1 to Dec 25, 2020
 **ranking based on each title's streaming and engagement share among the top 100 most-watched movies by 2M Reelgood users in the U.S. during their respective opening weekends

Top 10 U.S. SVOD services based on hours of original content

**includes original TV shows and episodes available on every service as of Jan 15, 2021*

- | | |
|----------------------|-------------------------|
| 1 Netflix | 6 STARZ |
| 2 HBO Max | 7 Disney+ |
| 3 Hulu | 8 CBS All Access |
| 4 Showtime | 9 Apple TV+ |
| 5 Prime Video | 10 EPIX NOW |

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Top 10 U.S. SVOD services based on total hours of content

**includes movies, TV shows and episodes available on every service as of Jan 15, 2021*

- | | |
|--------------------------------|--------------------------|
| 1 Prime Video | 6 Fandor |
| 2 Netflix | 7 HBO Now |
| 3 EPIX NOW | 8 FuboTV |
| 4 HBO Max | 9 Crunchyroll |
| 5 The Criterion Channel | 10 CBS All Access |

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Top 10 U.S. SVOD services based on catalog growth rate

**based on a comparison of Reelgood catalog data for all services on Jan 15, 2020 and Jan 15, 2021*

- | | |
|-----------------------|-------------------------|
| 1 Sundance Now | 6 Disney+ |
| 2 Apple TV+ | 7 CBS All Access |
| 3 HBO Max | 8 Shudder |
| 4 BritBox | 9 Showtime |
| 5 STARZ | 10 Crunchyroll |

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Top 10 U.S. SVOD services based on hours of fresh* content

**data as of Jan 15, 2021, with fresh content defined as any title that was released within the last 3 years*

- | | |
|----------------------|--------------------------|
| 1 Prime Video | 6 HBO Now |
| 2 Netflix | 7 EPIX NOW |
| 3 Hulu | 8 Showtime |
| 4 HBO Max | 9 Crunchyroll |
| 5 FuboTV | 10 CBS All Access |

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Learn how VOD Viewing Insights enables data-driven decisions

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Reelgood provides insights into streaming TV and movie engagement, enabled by its award-winning consumer app and industry-leading catalog data. Companies such as Roku, AMC, Microsoft, and LG rely on Reelgood’s data to help their businesses succeed. Founded in 2015, the company has raised \$11MM in venture capital and performed three acquisitions. Reelgood is headquartered in San Francisco with offices in Canada, Ecuador, and Australia.

Contact us at sales@reelgood.com