

VAB - 2019

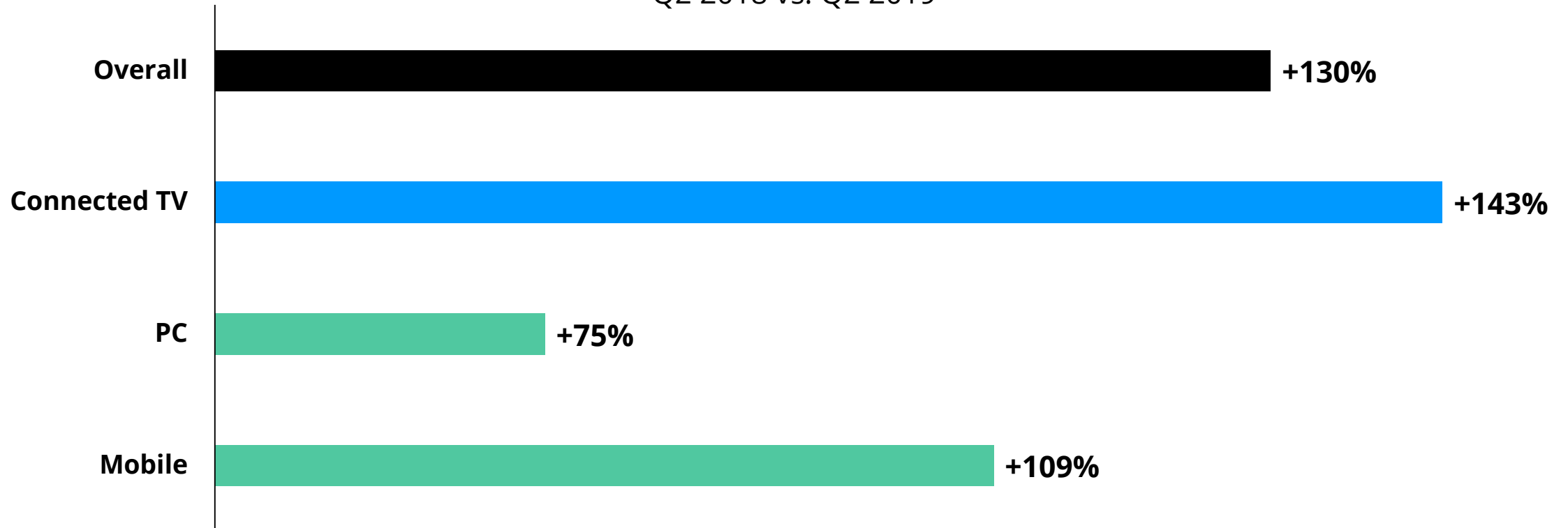
Begun, The Streaming War Has

A Look At What's Ahead For On-Demand Platforms

Streaming Is Experiencing Tremendous Growth Across The Population, Especially On Connected TVs

Growth in Streaming Viewing Hours

Q2 2018 vs. Q2 2019

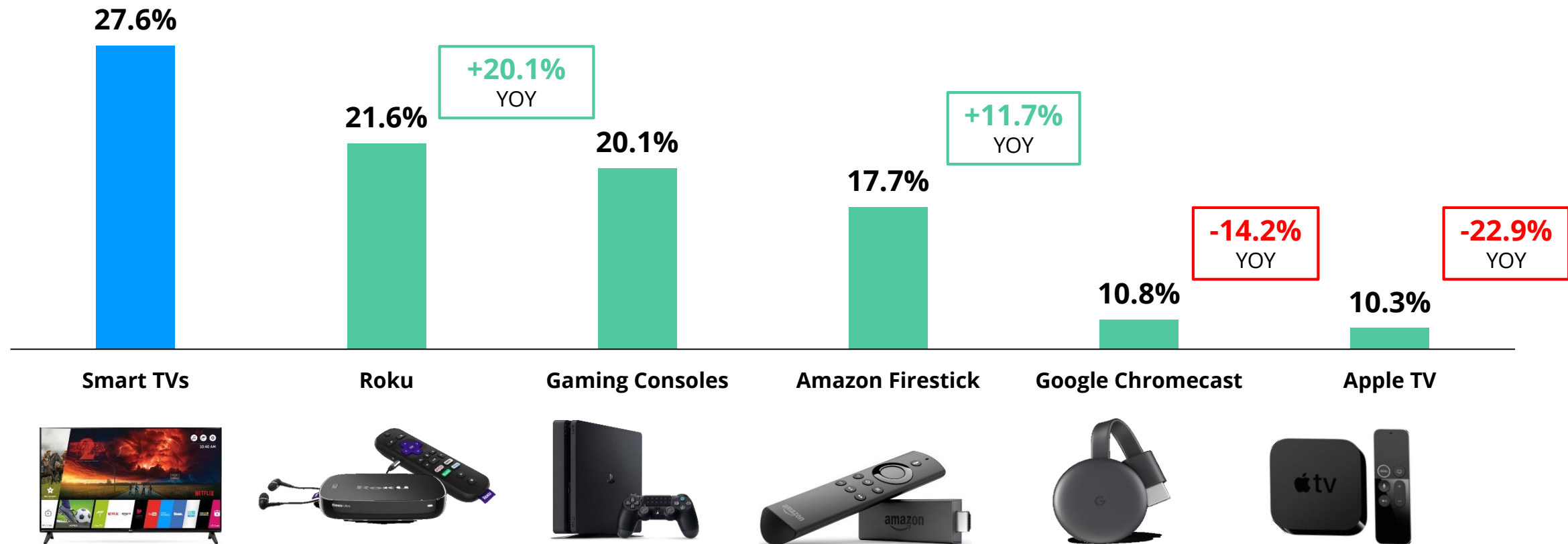


Source: Conviva, Q2 2019 State of the Streaming TV Industry infographic, July 2019.

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The Growth Of Connected TV Streaming Is Aided By The Popularity Of Different Access Points – Smart TVs, Players/Sticks & Game Consoles

Top Six Streaming Device Options Ranked by Popularity



Source: TiVo, Video Trends Report: Q2 2019.

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Today, Consumers Can Access TV & Video Content Through A Variety Of Streaming Services Anywhere & At Anytime

Subscription

Transactional

Ad-Supported

“OTT Aggregator / Standalone”

“TV Everywhere”
(Networks & MVPD with Authentication*)

Non-Authenticated Ad-Supported TV

“vMVPD”

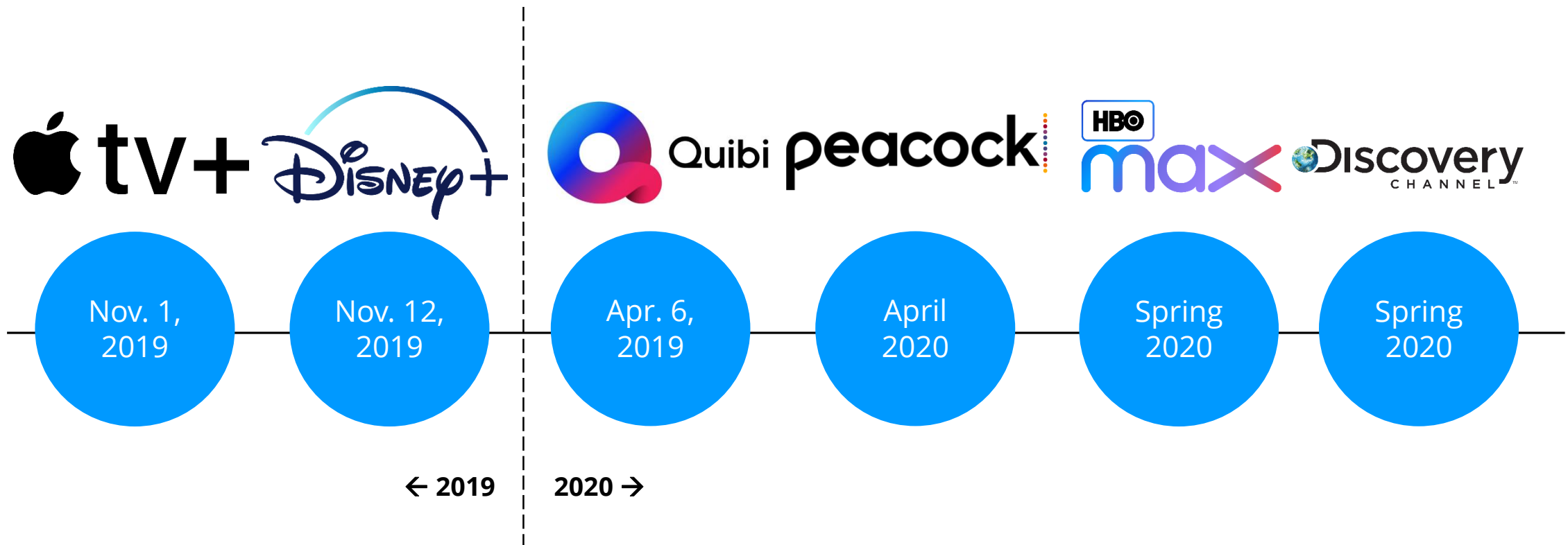
“Live Social Stream”

*some streaming services have dual revenue models and are listed in multiple groupings. Chart represents a robust sampling of available services as of 11/12/19.

Major New Services Are Set To Cause The Largest Disruption Within On-Demand Video Since The Introduction Of Netflix Streaming & Hulu Over Ten Years Ago

6 major streaming services, featuring highly-produced, original premium video content, are launching between November 2019 – Spring 2020

Streaming Services Launch Dates



Source: TV Time and United Talent Agency, *Beyond The Big Three: The Streaming Wars Are Upon Us*, October 2019.

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This Disruption Will Be Fueled By The Billions Of Dollars That Competing Streaming Services Will Invest In Programming Content To Acquire Viewers



\$30B

Could easily be spent annually on content by SVOD streaming services in the U.S. by 2024 (GroupM estimate)



And Streaming Services That Offer A Deep Library Of Owned Or Acquired Content Have A Competitive Advantage In The Eyes Of The Consumer

Importance of Library vs. Original Content in Selecting a Service

Library Content



of viewers find the availability of **library content** when considering a streaming service *"important"* or *"very important"*.

Original Content



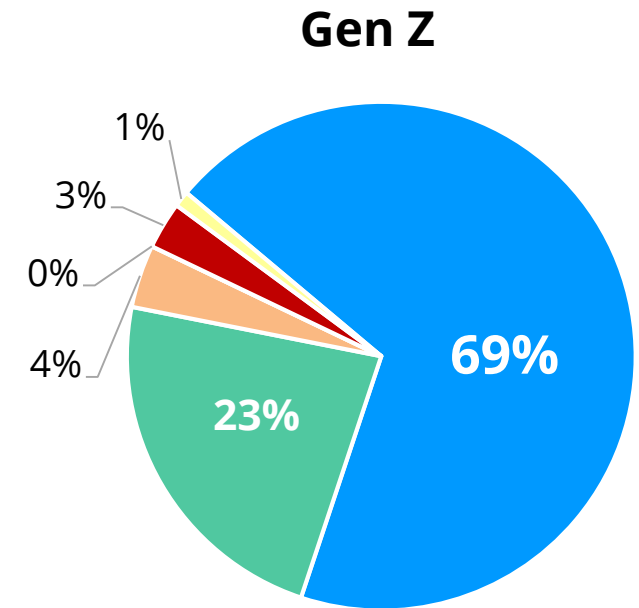
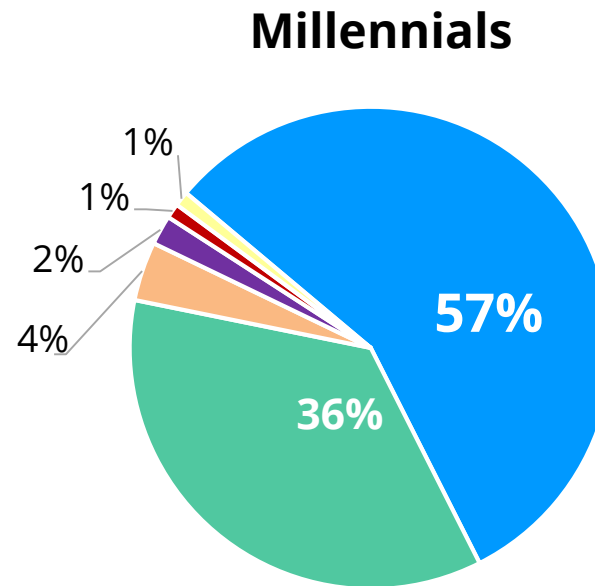
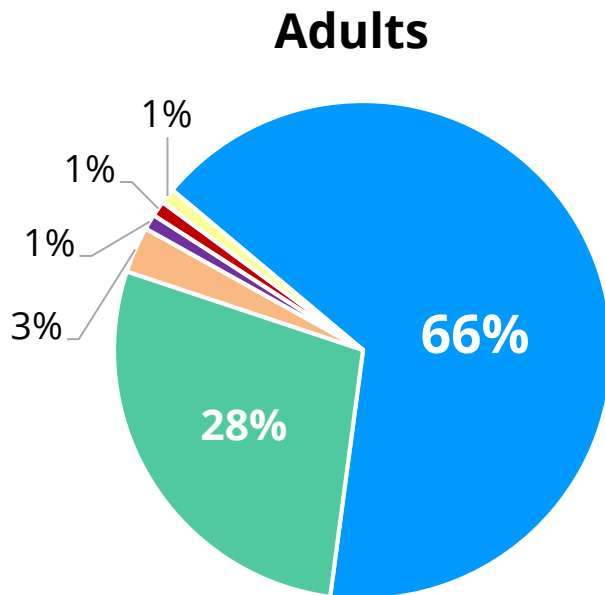
of viewers find the availability of **original content** when considering a streaming service *"important"* or *"very important"*.

Currently, A Majority Of Adults Subscribe To 1-2 Streaming Services, While Over One-Quarter Subscribe To 3-4 Services

Gen Z are slightly more likely to subscribe to 1-2 streaming services while over one-third of Millennials are likely to subscribe to 3-4 services

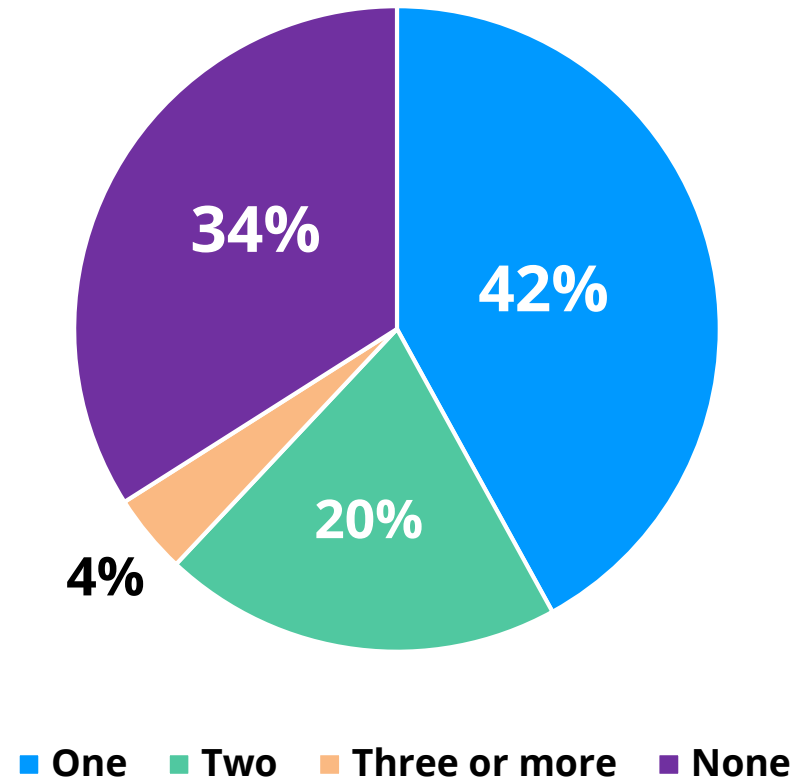
How many streaming services do you currently subscribe to?

■ 1-2 ■ 3-4 ■ 5-6 ■ 7-8 ■ 9-10 ■ 10+



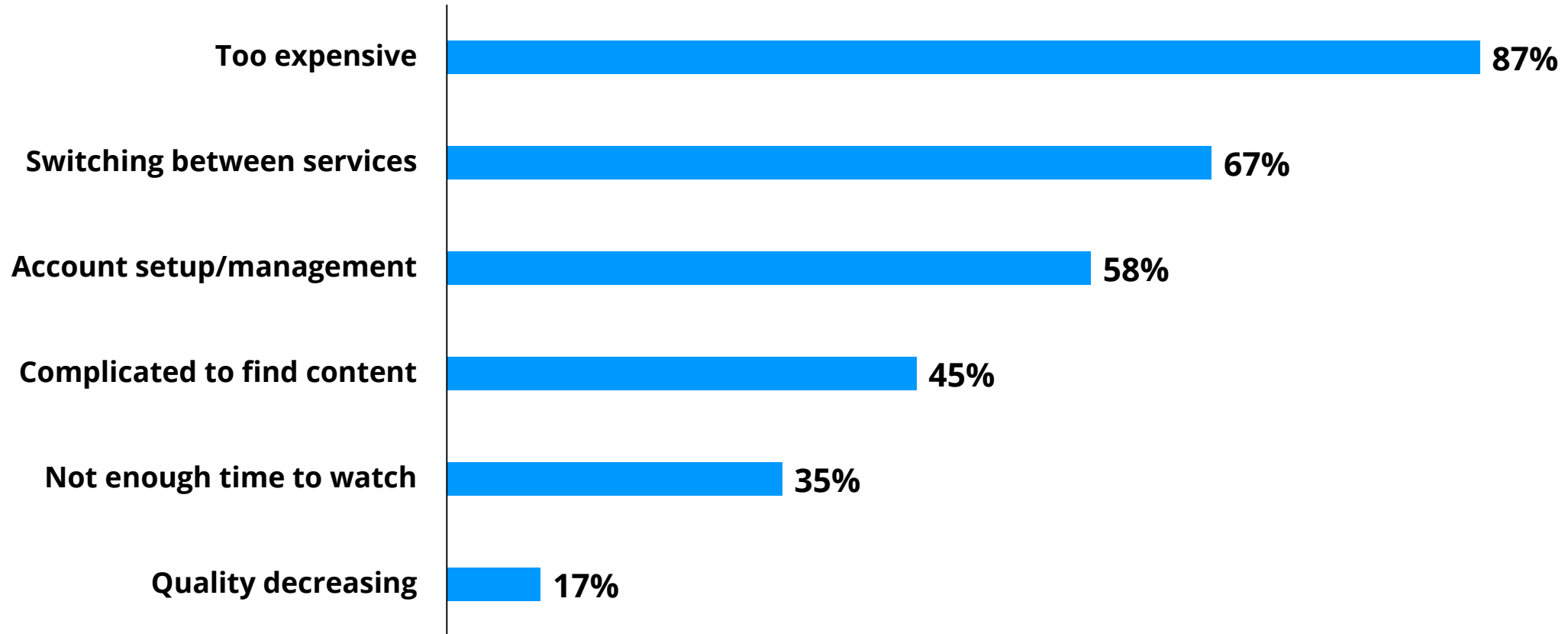
With New Subscription Offerings Coming To The Market, **Two-Thirds** Of Consumers Are Looking To Add **At Least One More** Service To Their Lineup

Expected Number of Services to be Added in the Next Year



With That Said, Not All Consumers Are Looking To Add More Subscriptions Which Creates Opportunities For Ad-Based Video On Demand Platforms

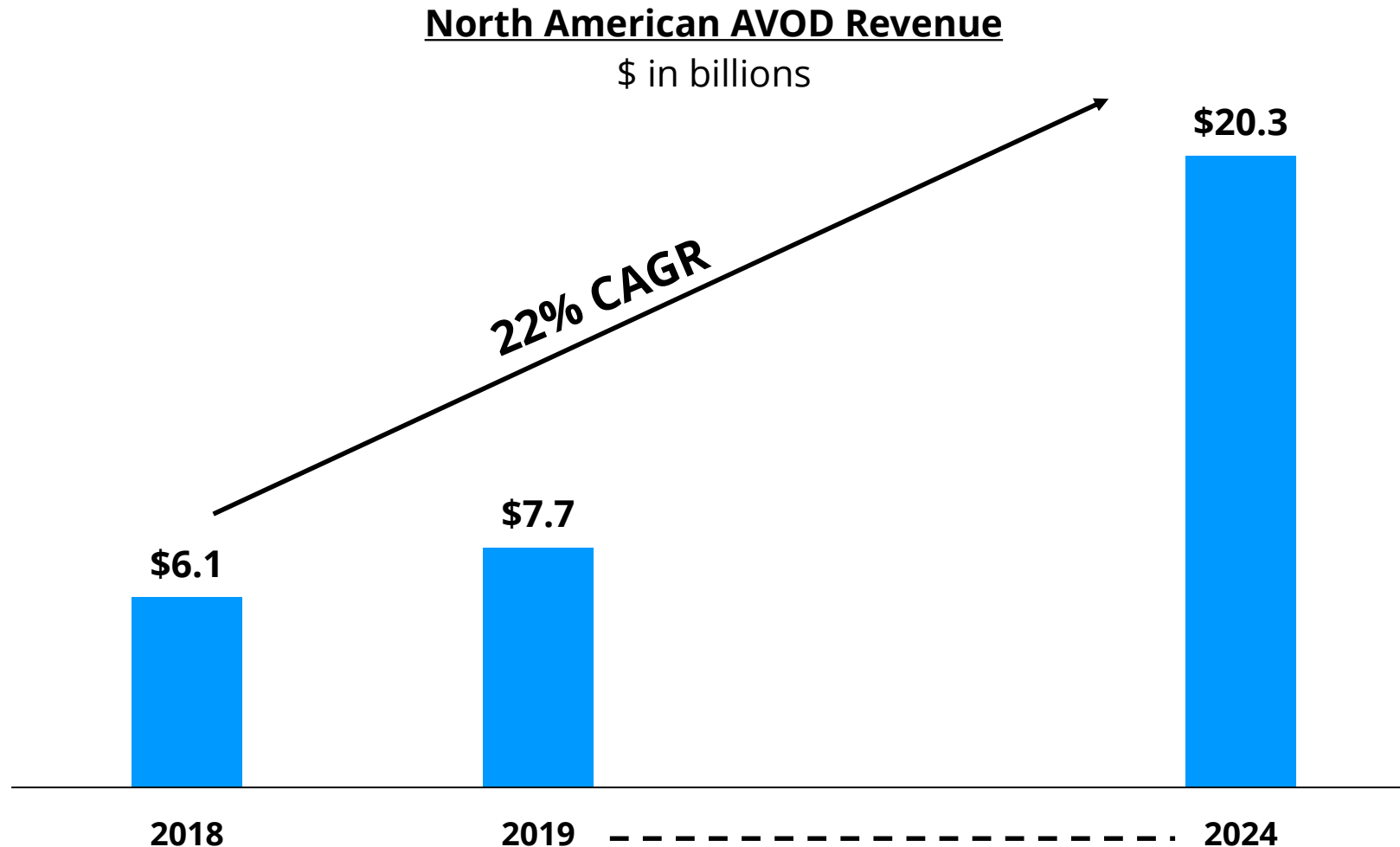
Impediments To Adding Additional Services



Source: TV Time and United Talent Agency, *Beyond The Big Three: The Streaming Wars Are Upon Us*, October 2019.

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In Fact, Within This Streaming Surge, Ad-Based VOD Is Projected To Experience **22%** Compound Annual Growth And Become A **\$20 Billion** Segment By 2024



Source: Digital TV Research via Multichannel News (North American AVOD Revenues), June 27, 2019.

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