

Fast Facts

▶▶ —————
What you need to know about new & emerging trends, platforms or technology

Left to Your Own Devices

The Latest on Multiplatform Video Consumption

June 2024



What You'll Learn

People today have more options for entertainment than ever before. As a result, it's important to stay current on viewership trends and consumption behaviors.

This analysis equips you with the latest updates on:

1

**Device Ownership
& Usage**



2

**Video Viewing
Behaviors**



3

**Video Ad
Engagement**



Click through a box above to be brought directly to the appropriate section

1

Device Ownership & Usage



Homes are very connected with most owning at least four types of devices, which highlights the importance of multiscreen video campaign strategies

Which of the following devices do you and other household members currently own?



93%

TV



93%

Smartphone



74%

Laptop



61%

Tablet



40%

Game Console



42%

Desktop Computer



35%

Smart Speaker

Source: VAB analysis of ARF DASH study, full year 2023 vs. full year 2022. Based on survey of 10,000 A18+. Q3: Which of the following devices do you and other household members currently own? Based on household weighting.

The average household has more TVs than any other device which creates significant opportunities for brands to engage consumers on a big screen

Households: Average Number of Devices Owned



2.4

TV



2.2

Smartphone



2.0

Smart Speaker



1.8

Laptop



1.7

Tablet



1.7

Game Console



1.3

Desktop Computer

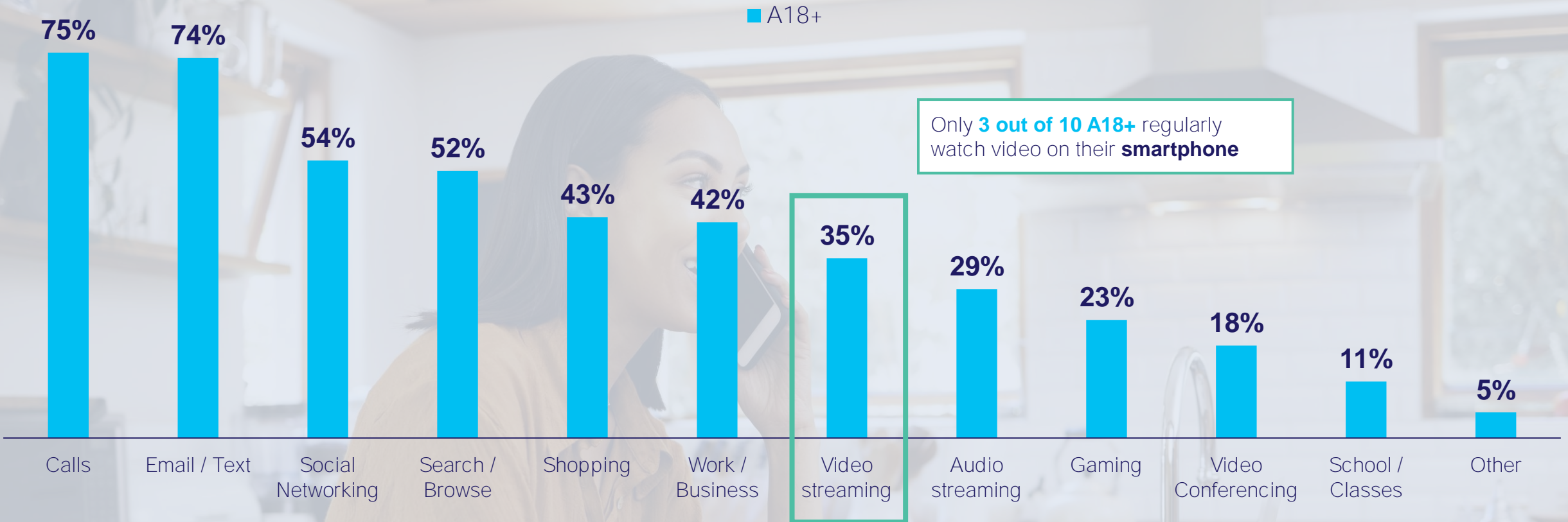
Source: VAB analysis of ARF DASH study, full year 2023. Based on survey of 10,000 A18+. Q4: How many of the following devices do you and the members of your household own and have used in the past 6 months? Based on household weighting.

Consumers primarily use mobile devices and computers for non-video activities, reinforcing TV as a key device for engaging audiences through video content



Smartphones are more often used for communication, socializing, searching and shopping than for streaming

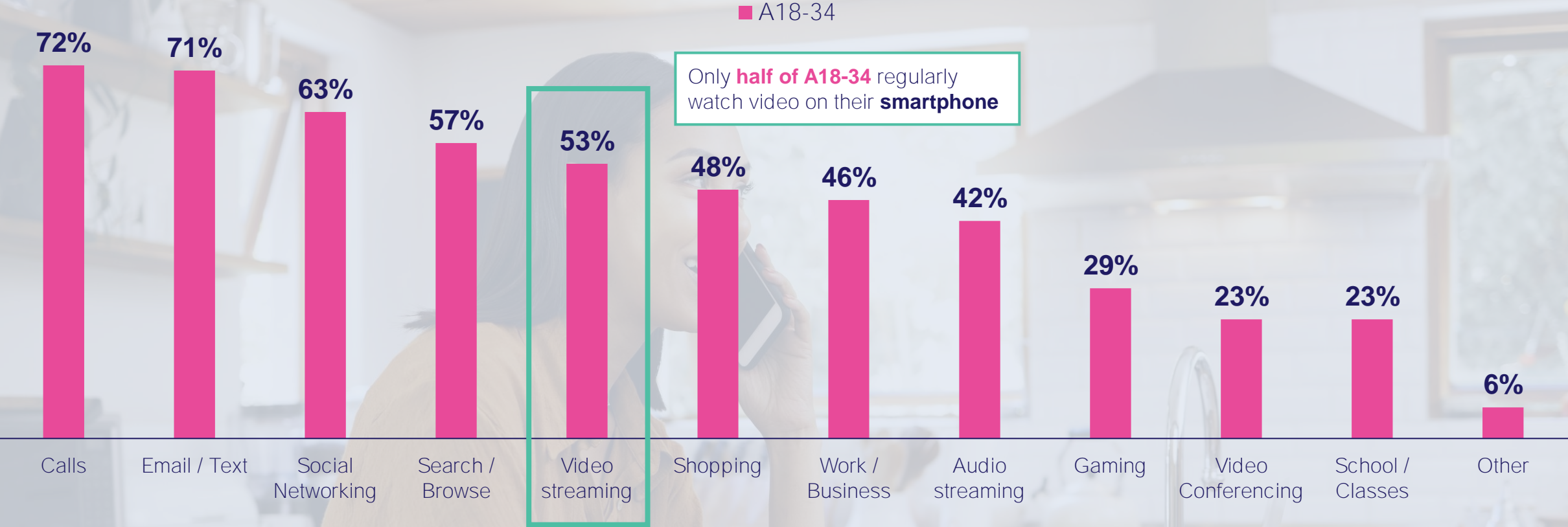
For what purposes do you regularly use your smartphone?



Source: VAB analysis of ARF DASH study, full year 2023. Based on survey of 10,000 A18+. Q29: For what purposes do you regularly use Smartphone 1? 'Smartphone 1' refers to a respondents' primary smartphone. A18+ based on respondent weighting.

Although younger adults are more likely to use their smartphones to stream video, they spend more of their time socializing and searching

For what purposes do you regularly use your smartphone?

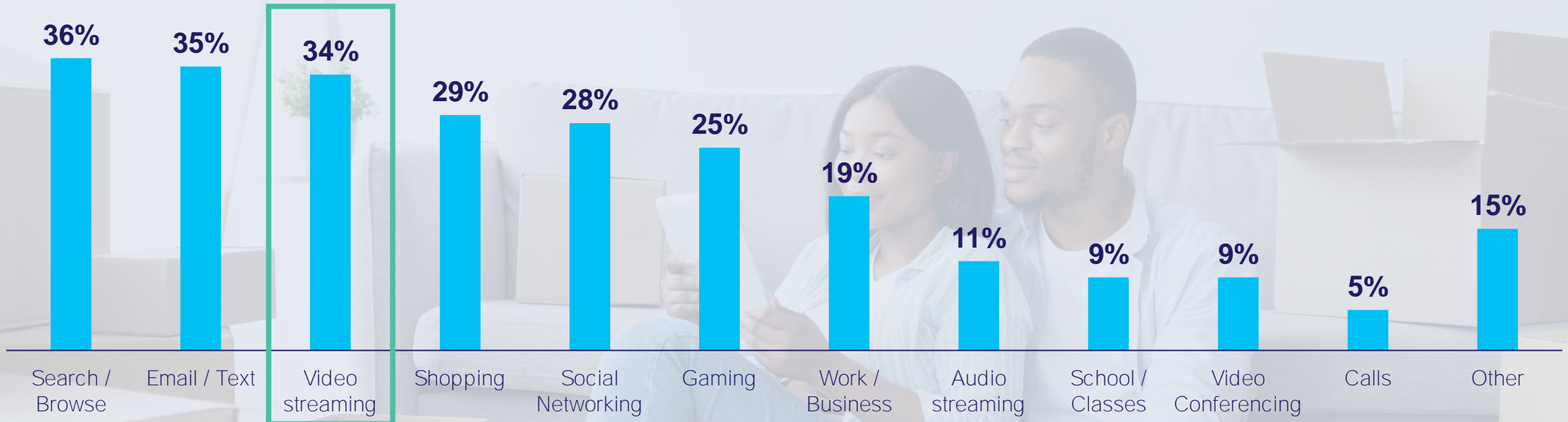


Source: VAB analysis of ARF DASH study, full year 2023. Based on survey of 10,000 A18+. Q29: For what purposes do you regularly use Smartphone 1? 'Smartphone 1' refers to a respondents' primary smartphone. A18-34 based on respondent weighting.

Like smartphones, tablets are frequently used for communication and web browsing, however streaming is close behind due to the larger screen

For what purposes do you regularly use your tablet?

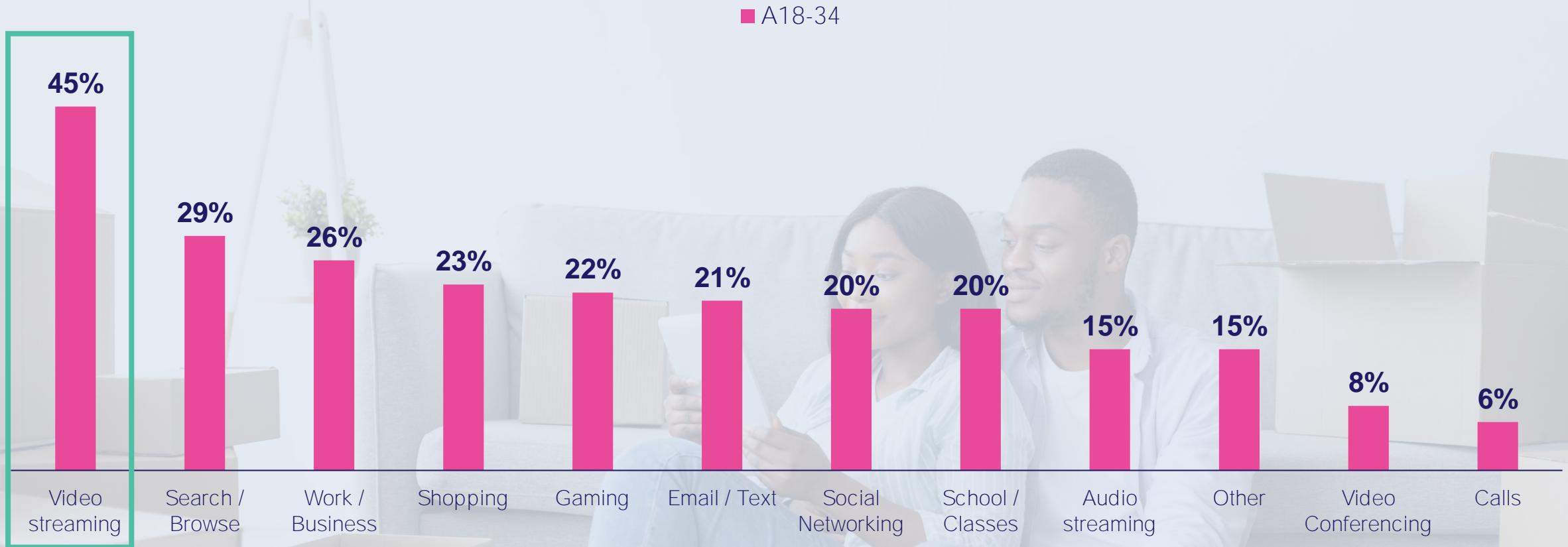
■ A18+



Source: VAB analysis of ARF DASH study, full year 2023. Based on survey of 10,000 A18+. Q28: For what purposes do you regularly use tablet 1? 'Tablet 1' refers to respondents' primary tablet. A18+ data based on respondent weighting.

Younger adults are more likely to stream video on the 'second' largest device screen in their home than any other activity

For what purposes do you regularly use your tablet?



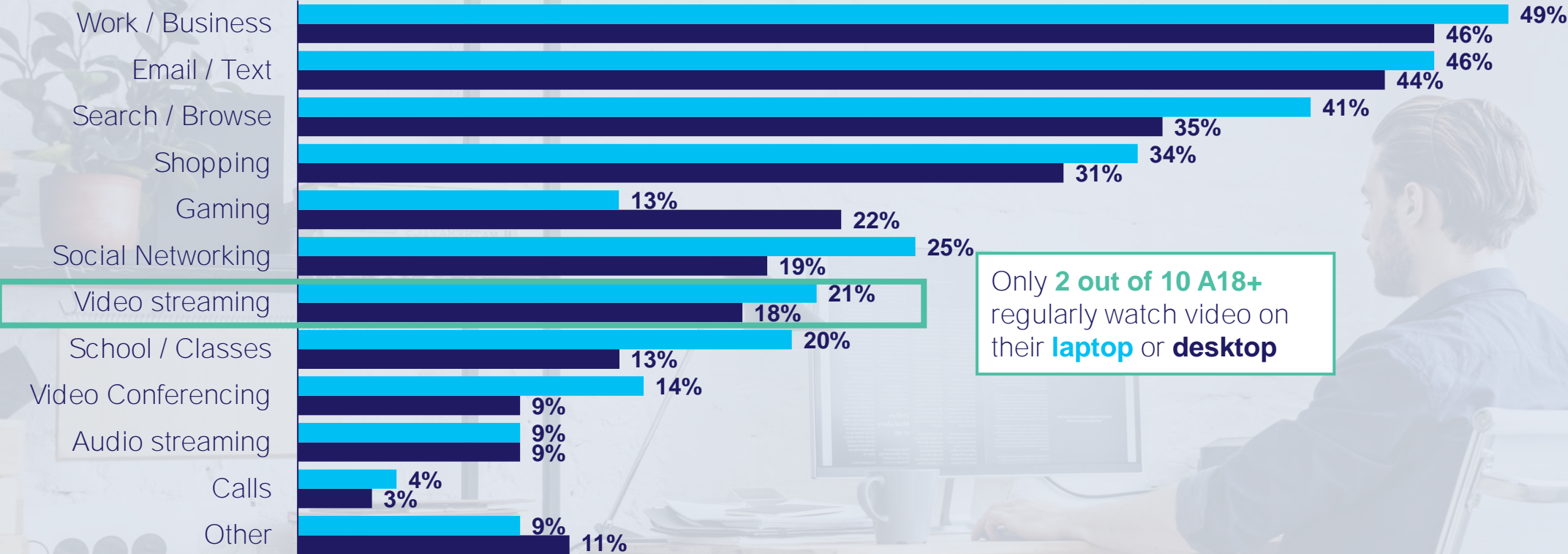
Source: VAB analysis of ARF DASH study, full year 2023. Based on survey of 10,000 A18+. Q28: For what purposes do you regularly use tablet 1? 'Tablet 1' refers to respondents' primary tablet. A18-34 data based on respondent weighting.

Adults more often use their desktop or laptop for productivity-focused tasks at work and their personal lives rather than for streaming video

For what purposes do you regularly use your desktop / laptop?

A18+

■ Laptop ■ Desktop



Only **2 out of 10 A18+** regularly watch video on their **laptop** or **desktop**

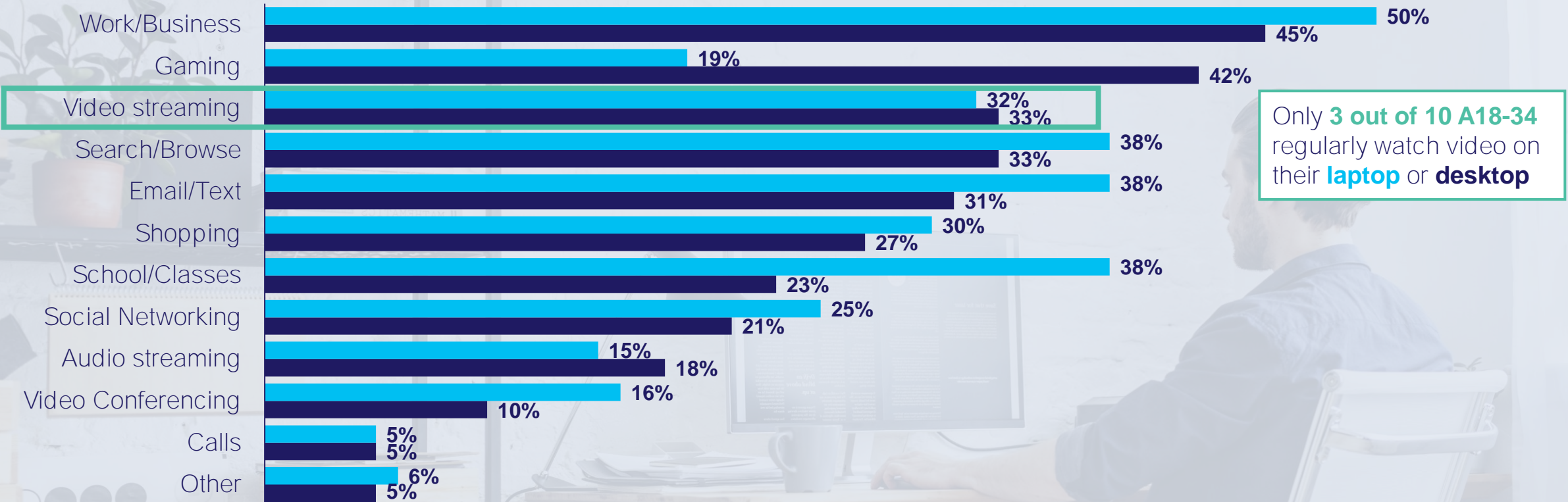
Source: VAB analysis of ARF DASH study, full year 2023. Based on survey of 10,000 A18+. Q25_5: For what purposes do you regularly use desktop computer? 'Desktop 1' refers to respondents' primary desktop. A18+ based on respondent weighting.

While younger adults usually use their computer for work-related tasks, gaming and streaming are more popular to them than the average adult

For what purposes do you regularly use your desktop / laptop?

A18-34

■ Laptop ■ Desktop



Only **3 out of 10 A18-34** regularly watch video on their **laptop** or **desktop**

Source: VAB analysis of ARF DASH study, full year 2023. Based on survey of 10,000 A18+. Q25_5: For what purposes do you regularly use desktop computer? 'Desktop 1' refers to respondents' primary desktop. A18-34 based on respondent weighting.

2

Video Viewing Behaviors



Homes are watching linear TV live throughout the day and across dozens of networks, enabling many touchpoints for brands to reach their consumers

Breakdown of linear TV viewership

91%

of viewing is **live**

72%

of viewing occurs **outside of primetime**

67%

of viewing is **on cable**

28

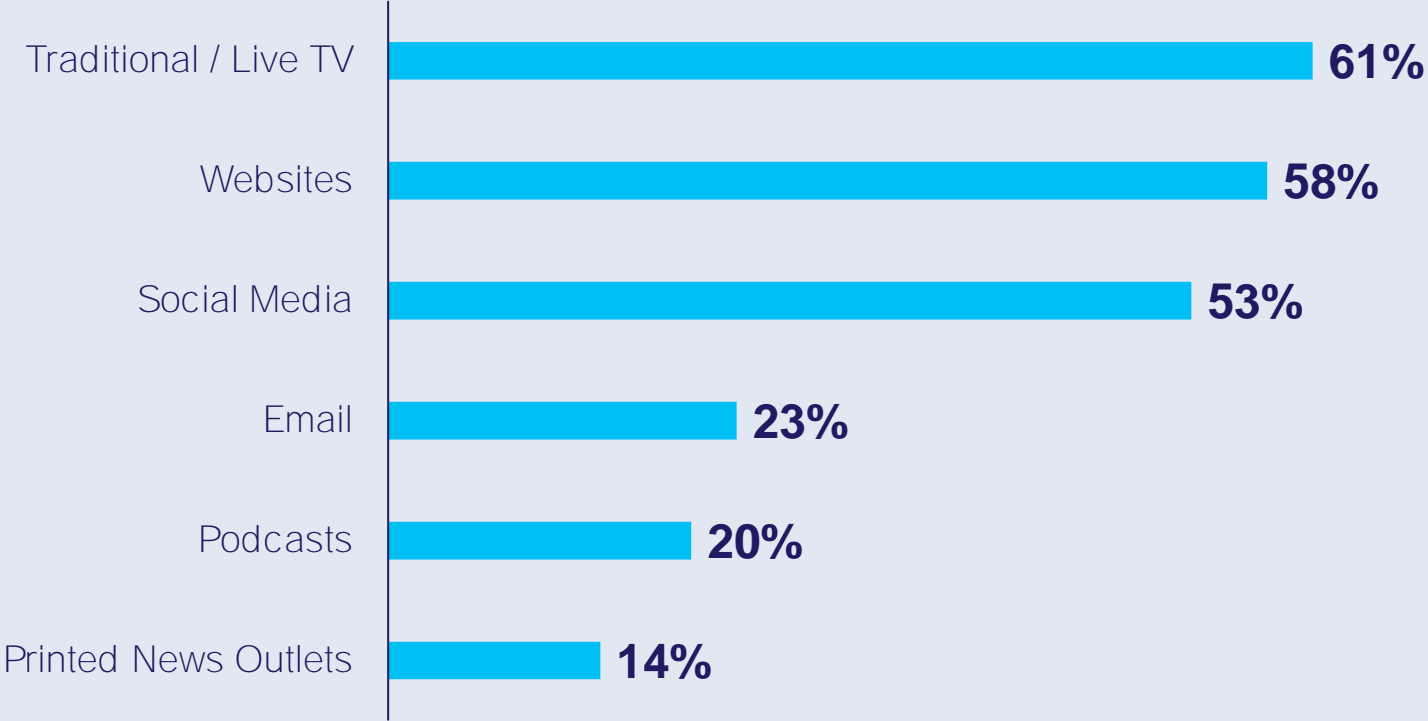
average **networks viewed per household**

Source: Effectv, *The TV Viewership Report: 2H 2023*. Comcast Aggregated Viewership Data (2H '23). Based on average time spent per day with Live, DVR and VOD viewing (6 hours, 11 minutes).



People turn to live TV most often for their news, highlighting its continued importance for reaching viewers, especially during an election year

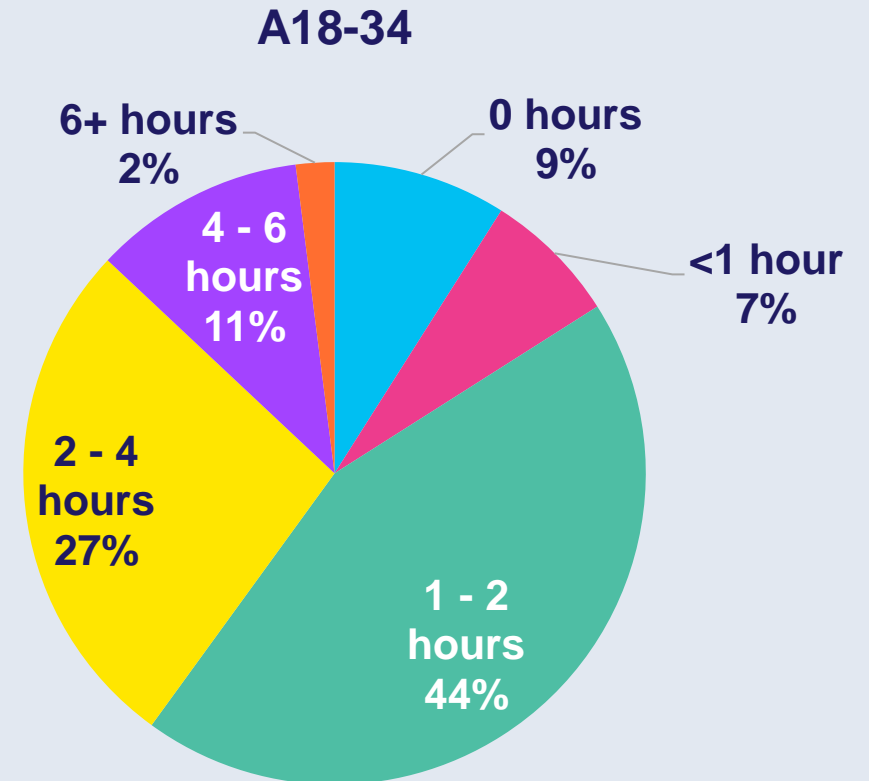
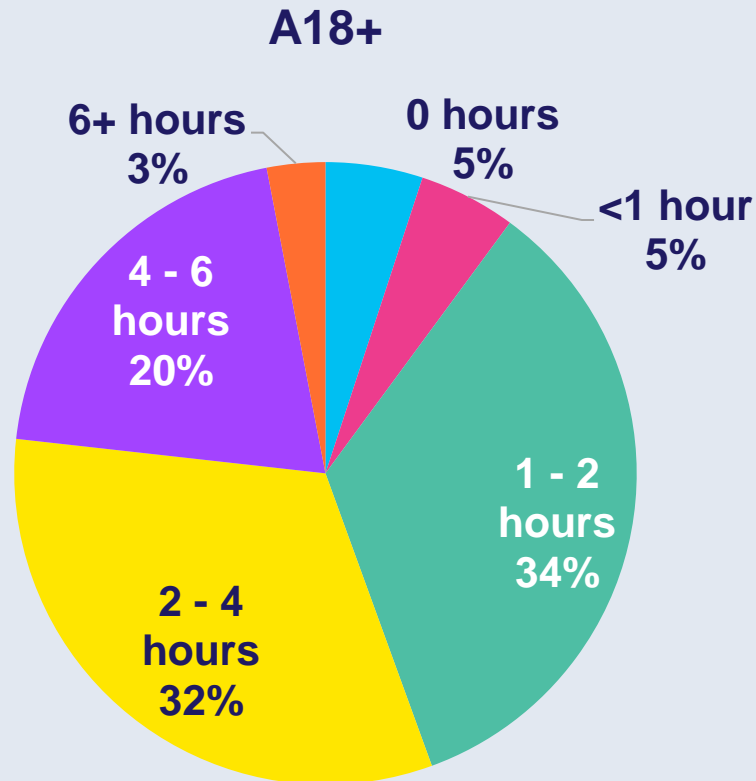
On which of the following channels do you most often consume news?



Source: Stirista, *Political Voter Profile Report*, 2024.

Most adults are dedicating at least 2 hours daily to watching TV, while four out of ten adults 18-34 are also spending at least two hours with TV daily

Time spent per day watching TV at home
% share of viewing



Source: VAB analysis of ARF DASH study, full year 2023. Based on survey of 10,000 A18+. QG2: On average, how much time each day do you watch TV (linear TV and streaming) at home from the time you wake up to the time you go to sleep? A18+ & 18-34 data based on respondent weighting.

There is also significant location-based video viewing beyond the home which creates additional engagement opportunities for marketers

Digital Out-of-Home Video Viewing

A18+ Monthly Reach



73.1MM

Bars & Restaurants



16.6MM

Fast Food / QSRs



9.7MM

Auto Centers



7.1MM

Gyms



6.8MM

Retail Stores

Source: Atmosphere TV, The People Platform; Reach based on one view with Atmosphere TV content/ads; Period: April 2024.



3

Video Ad Engagement

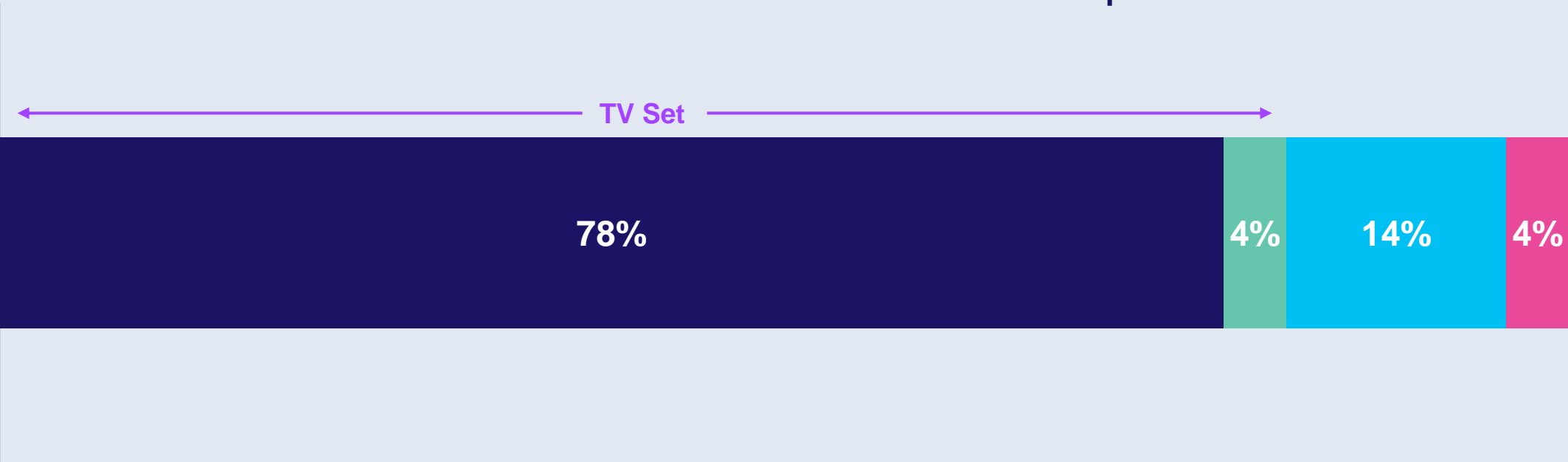


Between CTV and set-top box VOD, over 80% of digital ad views occur on the television set

Ad view composition by device

2H 2023

■ CTV ■ STB VOD ■ Mobile ■ Desktop



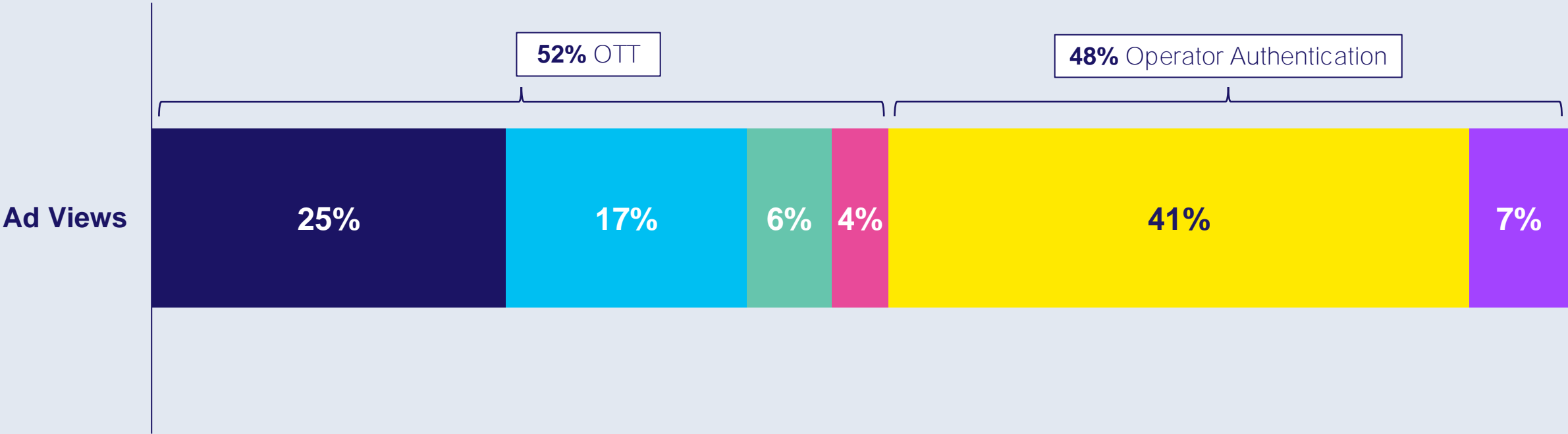
Source: Freewheel, *Video Marketplace Report*, 2H 2023. Reflects U.S. data only.

Ad views are fragmented across distribution points which highlights the need for cross-platform strategies in optimizing target audience reach

% share of ad views by distribution platform

2H 2023

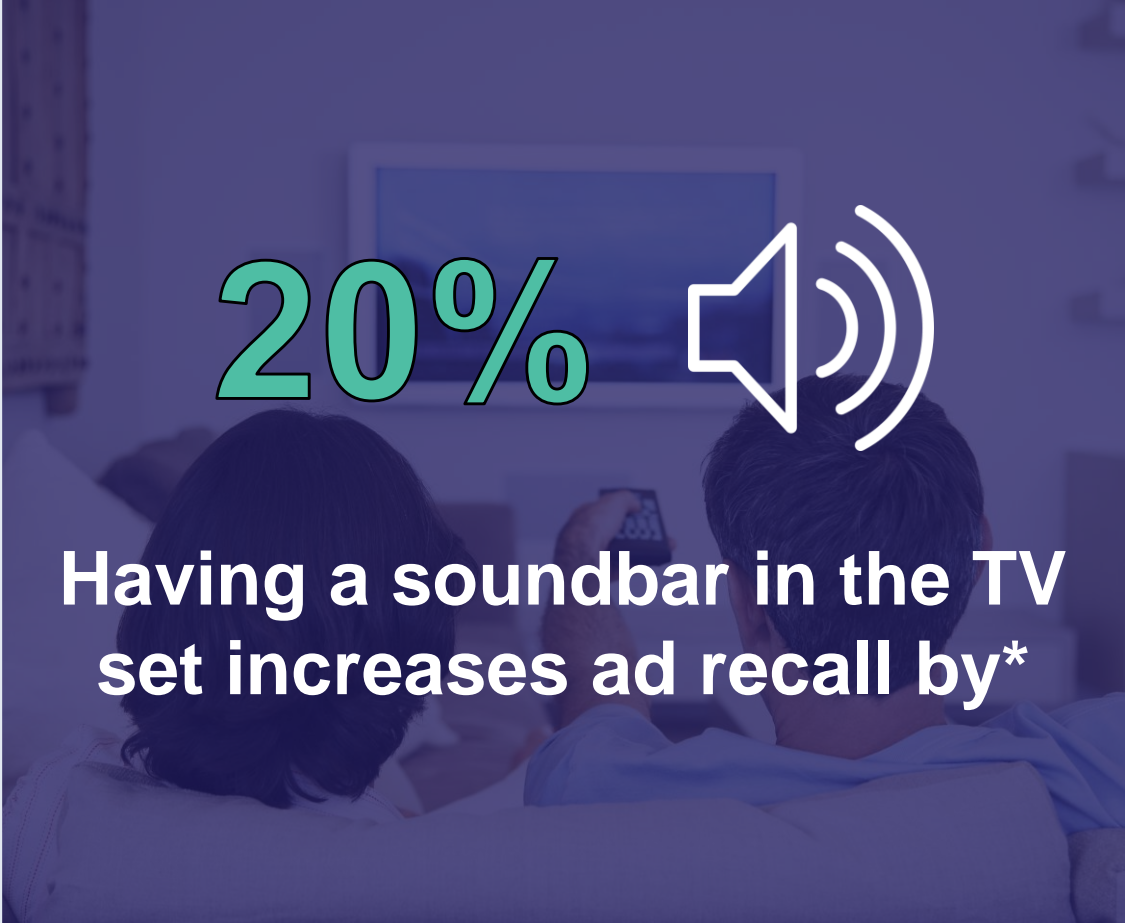
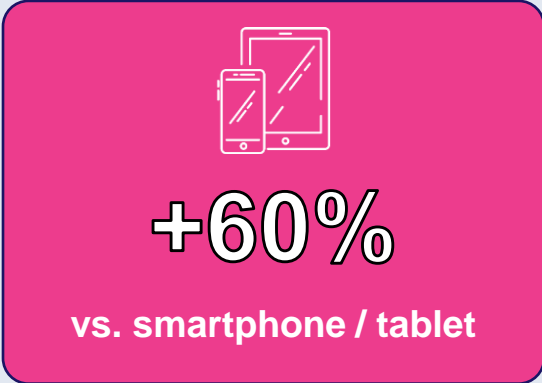
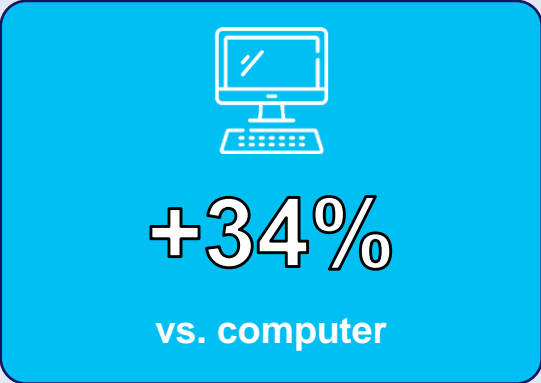
■ FAST ■ DTC ■ vMVPD ■ Digital Content Aggregator ■ TVE ■ STB VOD



Source: Freewheel, *Video Marketplace Report*, 2H 2023. DTC = direct-to-consumer apps from publishers. 'OTT' refers to content distributed to viewers over the Internet. 'Operator Authentication' refers to content accessed via a cable/satellite subscription by logging into an operator's website or app.

TV drives the highest ad recall of all devices, outperforming computers and smartphones, and a soundbar further enhances this effect

The TV screen drives the highest ad recall of all devices



Source: Thinkbox UK, *Context Effects*, Map The Territory & Tapestry Research, 2024. Source: A18. Do you remember seeing any advertising when you watched [occasion]? A7a. On which device did you watch [OCCASION]? Base: 4,005 viewing occasions with ads answered by 2,017 online respondents aged 18-75 who watched any type of video content via any source the previous day. Sample matched to Barb. *A18. Do you remember seeing any advertising when you watched [OCCASION]? A7b. Did the TV on which you were watching have a 'sound bar' to enhance the sound quality? Base: 2,927 viewing occasions with ads watched via TV the previous day. Sample matched to Barb.



When spending memorable moments watching TV with others in the living room, the ads also become more memorable



+23%

Increase in ad recall when watching with others in the living room vs. watching alone

Source: Thinkbox UK, *Context Effects*, Map The Territory & Tapestry Research, 2024. Source: A18. Do you remember seeing any advertising when you watched [occasion]? A10. Who, if anyone, were you watching [occasions] with? Base: 4,005 viewing occasions with ads answered by 2,017 online respondents aged 18-75 who watched any type of video content via any source the previous day. Sample matched to Barb.



Viewers are often second-screening while watching TV, a behavior that can be leveraged by marketers to connect with consumers directly



3 in 4

U.S. adults **look at a mobile device** while watching TV



1 in 3

U.S. adults **shop online** while streaming TV

Consumers have become more accustomed to interacting with ads on their TV, a behavior that is illustrated by Roundel's research with Target Store shoppers



Target Store shoppers often act after seeing ads on TV, including looking up products they saw advertised on their other devices

% of Target Store Shoppers Who Engage in the Following Behaviors



49%

are likely to **search for an item after seeing it on TV***



60%

look up a product on their phone / computer when they see a video ad they are interested in

Source: Roundel, Target Guest Survey on CTV. Based on survey of 2,876 Target guests launched 2/20/24. Note: Target Store Shoppers refers to consumers who have reported actively shopping at Target (in-store or online). *Based on respondents who answered, 'somewhat likely' or 'extremely likely'.

They're more likely to scan a QR code on a TV, indicating a preference for quick and familiar methods to engage with content and make purchases

1/3

of guests say they would be likely to **scan a QR code on their TV** if they knew it would **take them to a familiar site**
(+3% vs. 2023)

50%

more likely for Target guests to say that they are likely to **use a QR code on a TV screen vs. a remote to 'click to learn / purchase'**



15%
are likely to **scan a QR code**



10%
are likely to **use a remote**

Source: Roundel, Target Guest Survey on CTV. Based on survey of 2,876 Target guests launched 2/20/24. Note: Target Store Shoppers refers to consumers who have reported actively shopping at Target (in-store or online). Based on respondents who answered, 'somewhat likely' or 'extremely likely'.

Target Store shoppers are comfortable spending around \$30 when making a purchase on their TV, indicating a positive view of in-screen shopping



Target Store shoppers feel comfortable spending

~\$30

when making a purchase from their TV

Source: Roundel, Target Guest Survey on CTV. Based on survey of 2,876 Target guests launched 2/20/24. Note: Target Store Shoppers refers to consumers who have reported actively shopping at Target (in-store or online).

Key Marketer Takeaways

- ▶ Consumers rely on their smartphones and computers for communication and productivity, but TV is crucial for video content as viewers prefer watching on the biggest screen in the home
- ▶ Live TV is an important platform for brand engagement, offering extensive daily viewership, and providing additional opportunities through location-based video advertising
- ▶ TV's strong performance in ad views and recall highlights its influential role, with second-screening and interactive ads further enhancing consumer engagement and encouraging purchasing behavior

Creators

Jason Wiese

SVP, Director of Strategic Insights
jasonw@thevab.com

Leah Montner-Dixon

Director, Audience & Behavioral Insights
leahm@thevab.com

Kaileen Cain

Senior Insights Analyst
kaileenc@thevab.com

Discover more

Looking for more data, insights and takeaways?
Check out this related VAB content

Through Upfront season, marketers are making important decisions about their video investment strategy.

We're here to help.

Visit our [Upfront Planning Resource Center](#) for a curated a list of resources filled with the data, analysis and insights needed to make informed investment decisions.



Laugh, Cry, Share, Buy

How TV & Streaming Influences Gen Z More Than Leading Social Platforms



Prioritize Quality

The Importance of Value When Selecting Video Platforms



The Consumer Connection

Understanding the Effect of Quality Across Media Platforms



Shortening the Path to Purchase

How New Opportunities in Shoppable TV are Igniting Viewer Engagement & Brand Performance



25 Ways TV Grows Brands

Powering Performance Through Full-Funnel Business Outcomes



You Oughta Know

Why All Impressions Aren't Created Equal & What It Means for Video Measurement

VAB Members, brand marketers and agencies get free and immediate access to VAB's content library. Get access at [theVAB.com](https://thevab.com)

About VAB

VAB plays a dual role in the video advertising industry. We are leading the change to bring about a more innovative and transparent marketplace. We also provide the insights and thought leadership that enables marketers to develop business-driving marketing strategies.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.



We are committed to your business growth and proud to offer VAB members, brand marketers and agencies **complimentary access** to our continuously-growing Insights library. **Get immediate access** at theVAB.com.

