

Fast Facts



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

Left to Your Own Devices

The Latest on Multiplatform Media Consumption

June 2023



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

How People Define 'TV'



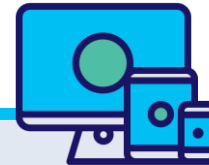
2

Average Audience Size by Media



3

Reach & Time Spent by Media



4

Content & Advertising Engagement



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

1

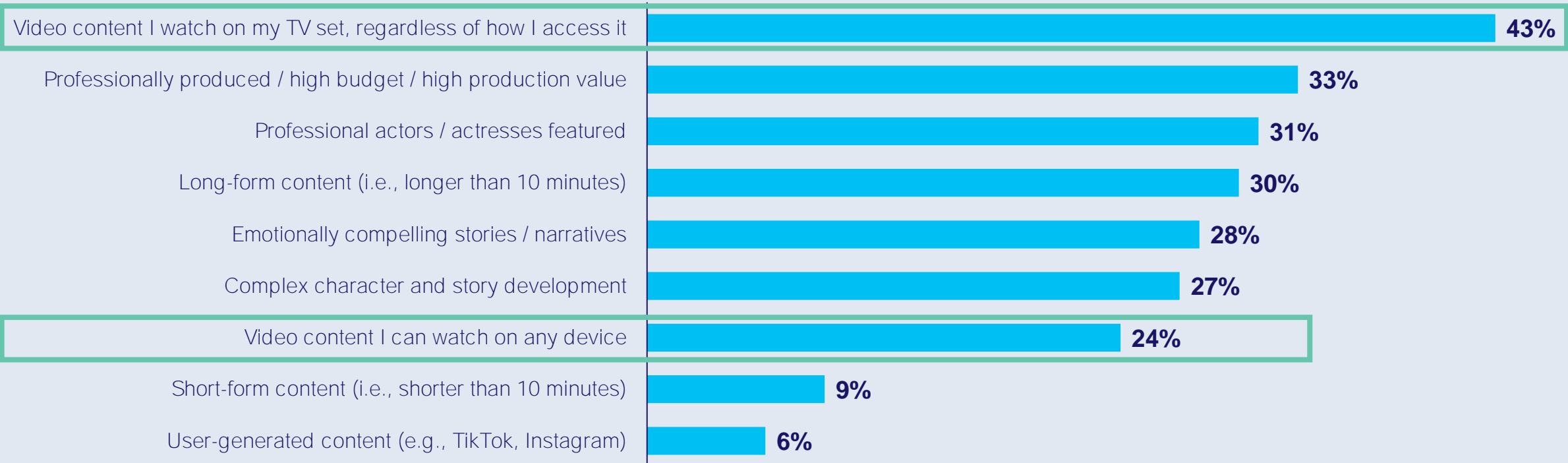
How People Define 'TV'



People define TV as linear and streaming with the TV set as the main device, while many also extend the definition to include content across platforms

Which of the following statements are how you would define 'TV'?

% of total respondents



Source: VAB custom research fielded by Hub Entertainment Research as part of the 2023 *Evolution of Video Branding* report. Data sourced from Hub's survey of 2,400 TV consumers, ages 16-74 who meet the following criteria: watch at least one hour of TV / week, have broadband access. Data collected early February 2023. Q2: Which of the following statements are how you would define 'TV'?

The TV set is the main factor for defining TV, regardless of how the content is accessed, across almost all age groups

▶ However, adults 25-34 are more likely to have a wider definition of 'TV' that includes all video across any device

Which of the following statements are how you would define 'TV'?

% of respondents who ranked each between #1-3

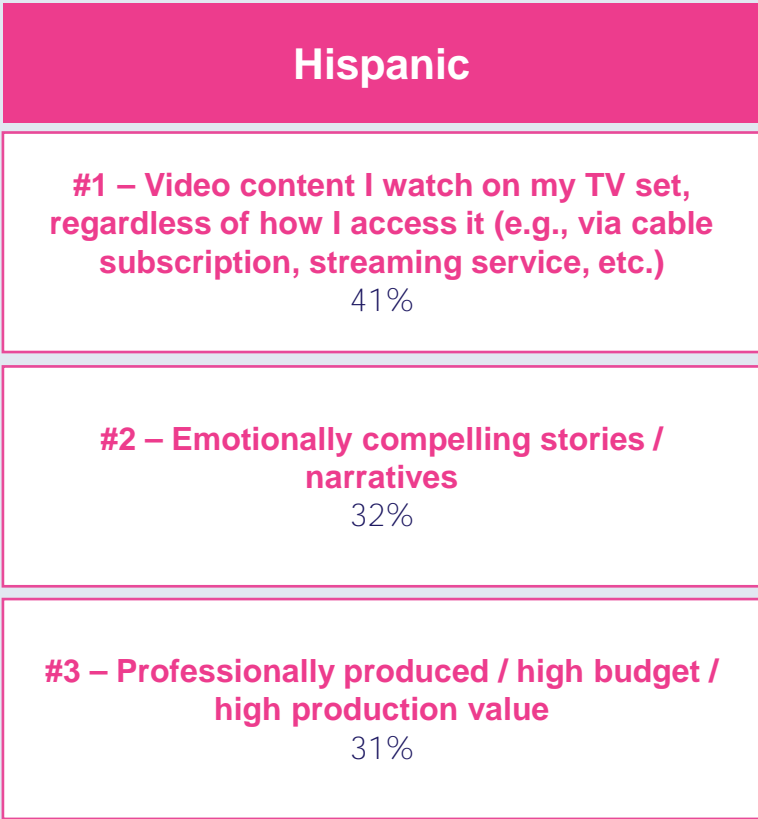
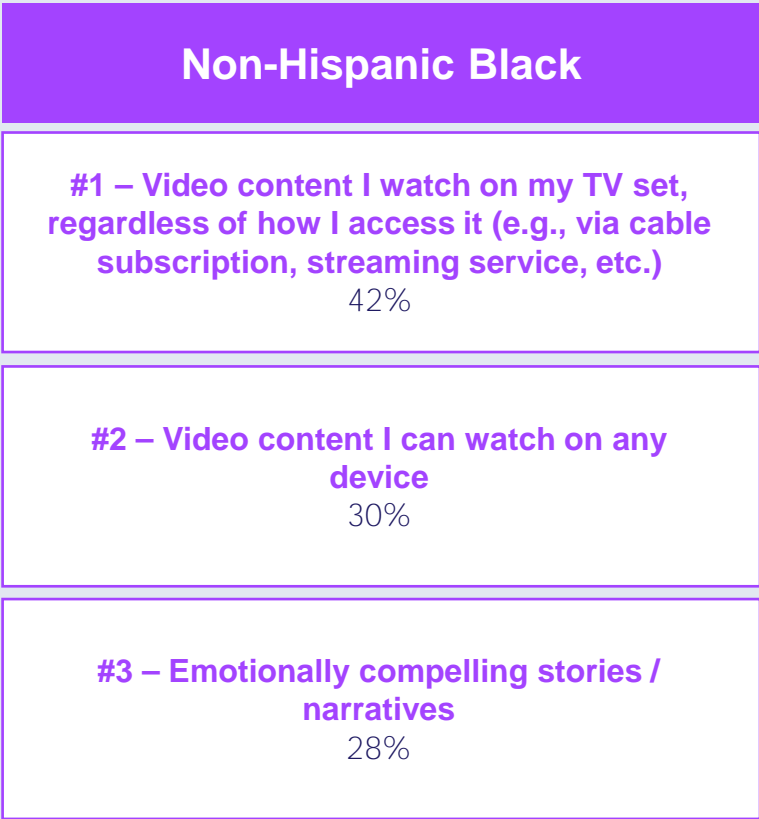
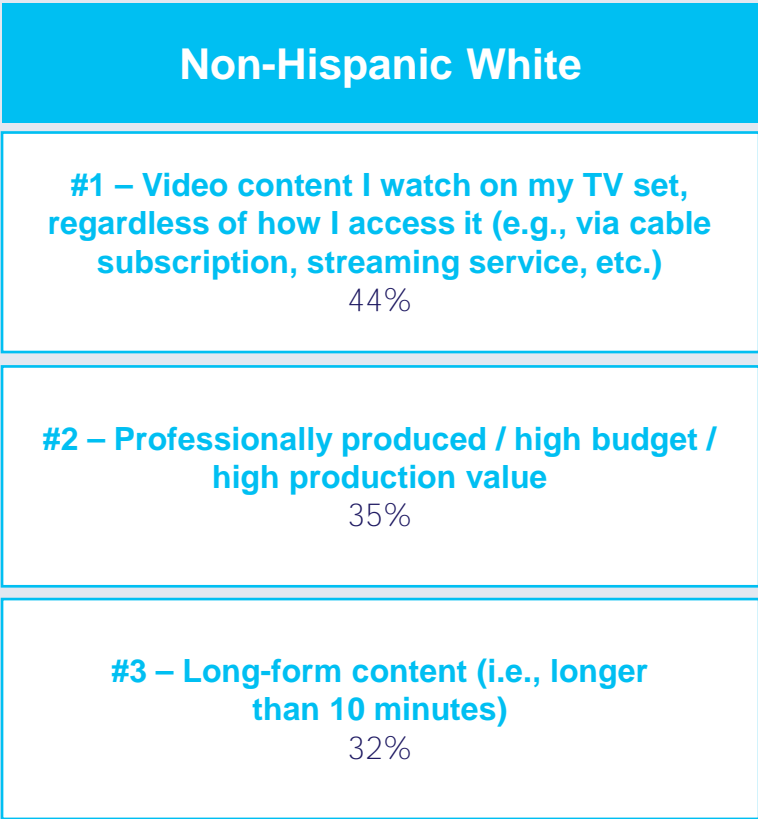
P16-24	A25-34	A35-54	A55-64	A65-74
<p>#1 – Video content I watch on my TV set, regardless of how I access it (e.g., via cable subscription, streaming service, etc.) 41%</p>	<p>#1 - Video content I watch on my TV set, regardless of how I access it (e.g., via cable subscription, streaming service, etc.) 48%</p>	<p>#1 - Video content I watch on my TV set, regardless of how I access it (e.g., via cable subscription, streaming service, etc.) 45%</p>	<p>#1 – Video content I watch on my TV set, regardless of how I access it (e.g., via cable subscription, streaming service, etc.) 41%</p>	<p>#1 – Video content I watch on my TV set, regardless of how I access it (e.g., via cable subscription, streaming service, etc.) 39%</p>
<p>#2 - Long-form content (i.e., longer than 10 minutes) 39%</p>	<p>#2 - Video content I can watch on any device 33%</p>	<p>#2 - Professionally produced / high budget / high production value 34%</p>	<p>#2 – Professionally produced / high budget / high production value 32%</p>	<p>#2 – Professionally produced / high budget / high production value 29%</p>
<p>#3 - Professionally produced / high budget / high production value 37%</p>	<p>#3 - Emotionally compelling stories / narratives 32%</p>	<p>#3 - Professional actors / actresses featured 32%</p>	<p>#3 – Long-form content (i.e., longer than 10 minutes) 26%</p>	<p>#3 – Emotionally compelling stories / narratives 23%</p>

Source: VAB custom research fielded by Hub Entertainment Research as part of the 2023 *Evolution of Video Branding* report. Data sourced from Hub's survey of 2,400 TV consumers, ages 16-74 who meet the following criteria: watch at least one hour of TV / week, have broadband access. Data collected early February 2023. Q2: Which of the following statements are how you would define 'TV'?

Multicultural consumers define TV similarly, however Black adults are more likely to have a wider definition that includes viewing across any device

Which of the following statements are how you would define 'TV'?

% of respondents who ranked each between #1-3



Source: VAB custom research fielded by Hub Entertainment Research as part of the 2023 *Evolution of Video Branding* report. Data sourced from Hub's survey of 2,400 TV consumers, ages 16-74 who meet the following criteria: watch at least one hour of TV / week, have broadband access. Data collected early February 2023. Q2: Which of the following statements are how you would define 'TV'?

2

Average Audience Size by Media



“Average audience” is a comparable metric that can be used to analyze audience scale across platforms

Average audience includes three critical measurements that are applicable across media – **unique reach**, **average minutes viewed per visitor / viewer** and **total minutes** – which provides a view of audience scale on a platform during the average minute of a specified time period.

What are the three measurements that are included in the “average audience” metric?



- ▶ **Unique reach**: the number of adults who view a given platform during a specific time period (e.g., weekly)



- ▶ **Average time spent per visitor / viewer**: the measure of time spent engaging with each platform by person during a specified time period



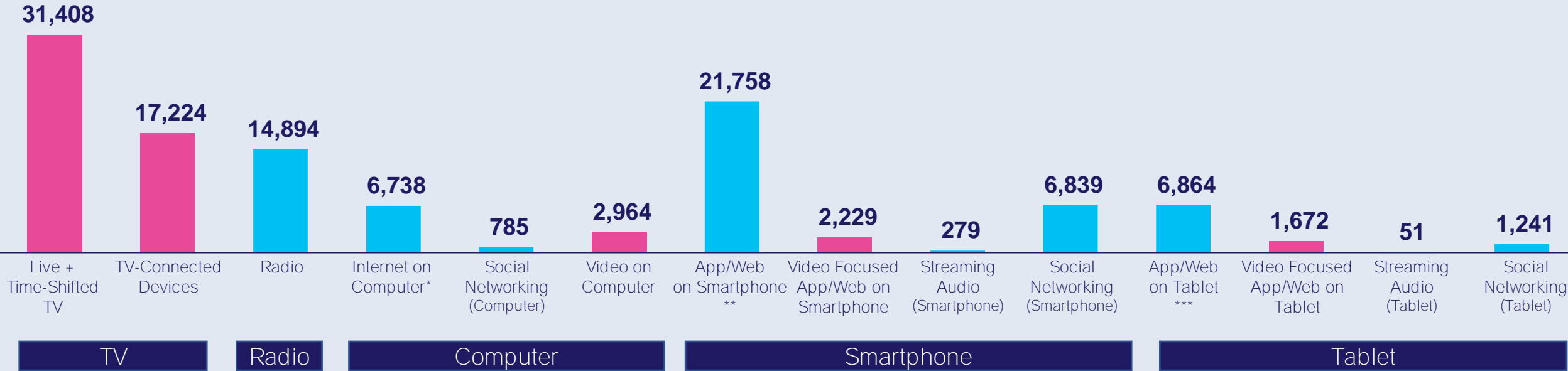
- ▶ **Total minutes**: the measure of total time spent engaging with each platform by everyone who has engaged with it during a specified time period

During any given minute, almost 50 million people are watching content on their TV set, led by linear TV viewing

A18+ Average Audience (000)

'TV Set'
Total Avg Audience
48,632

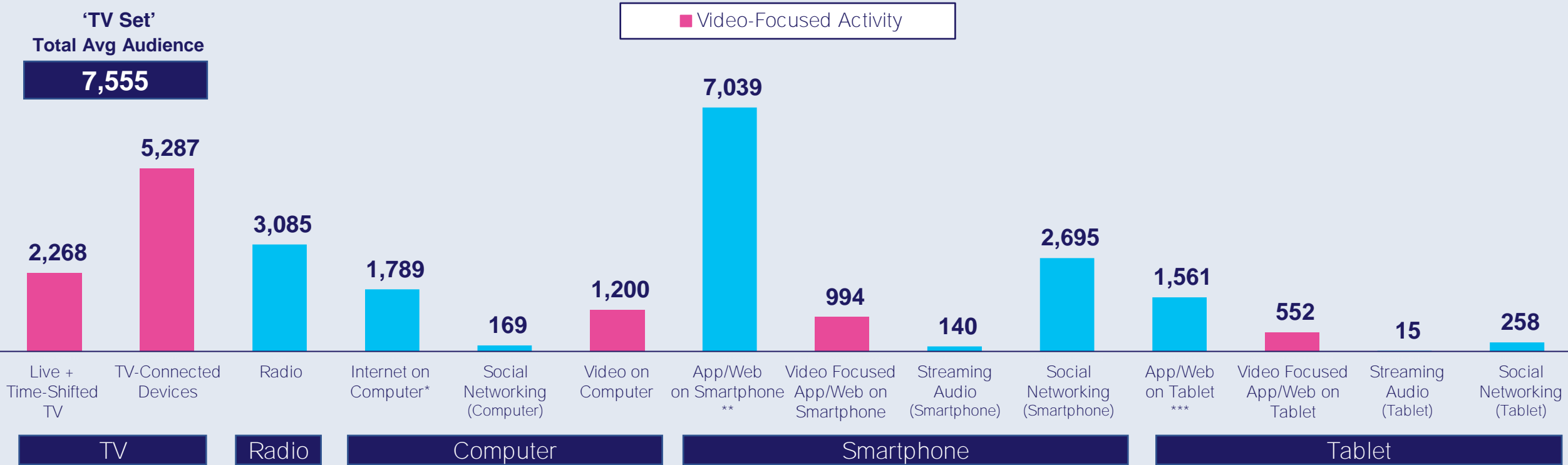
■ Video-Focused Activity



Source: VAB analysis of data from the Nielsen Audience Insights, Q3 2022. Based on weekly time spent in hours:minutes among U.S. population, A18+. 'TV set' = live + time-shifted TV & TV-Connected Devices. Nielsen, 2021-2022 National Universe Estimates. *Internet on computer inclusive of social networking on a computer. **App/web on a smartphone inclusive of video focused app/web on a smartphone, streaming audio on a smartphone and social networking on a smartphone. ***App/web on a tablet inclusive of streaming audio on a tablet and social networking on a tablet.

More adults 18-34 are watching content on their TV set in any given minute, led by connected TV, than are using apps on their smartphones

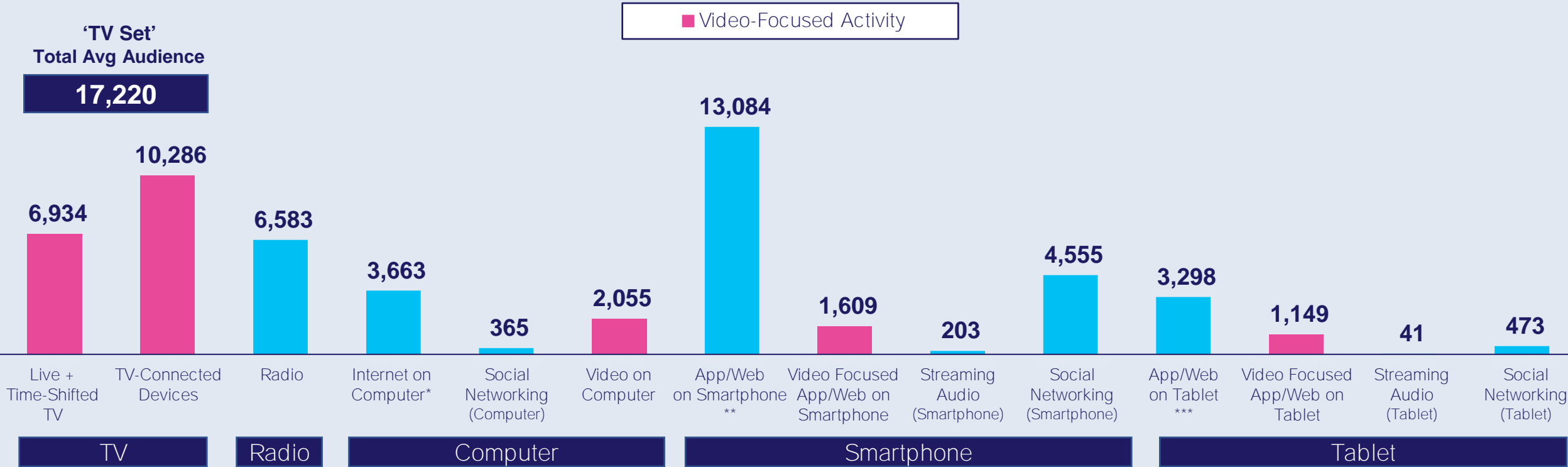
A18-34 Average Audience (000)



Source: VAB analysis of data from the Nielsen Audience Insights, Q3 2022. Based on weekly time spent in hours:minutes among U.S. population, A18-34. 'TV set' = live + time-shifted TV & TV-Connected Devices. Nielsen, 2021-2022 National Universe Estimates. *Internet on computer inclusive of social networking on a computer. **App/web on a smartphone inclusive of video focused app/web on a smartphone, streaming audio on a smartphone and social networking on a smartphone. ***App/web on a tablet inclusive of streaming audio on a tablet and social networking on a tablet.

More adults 18-49 are watching content on their TV set in any given minute, led by connected TV, than are using smartphone apps or the radio

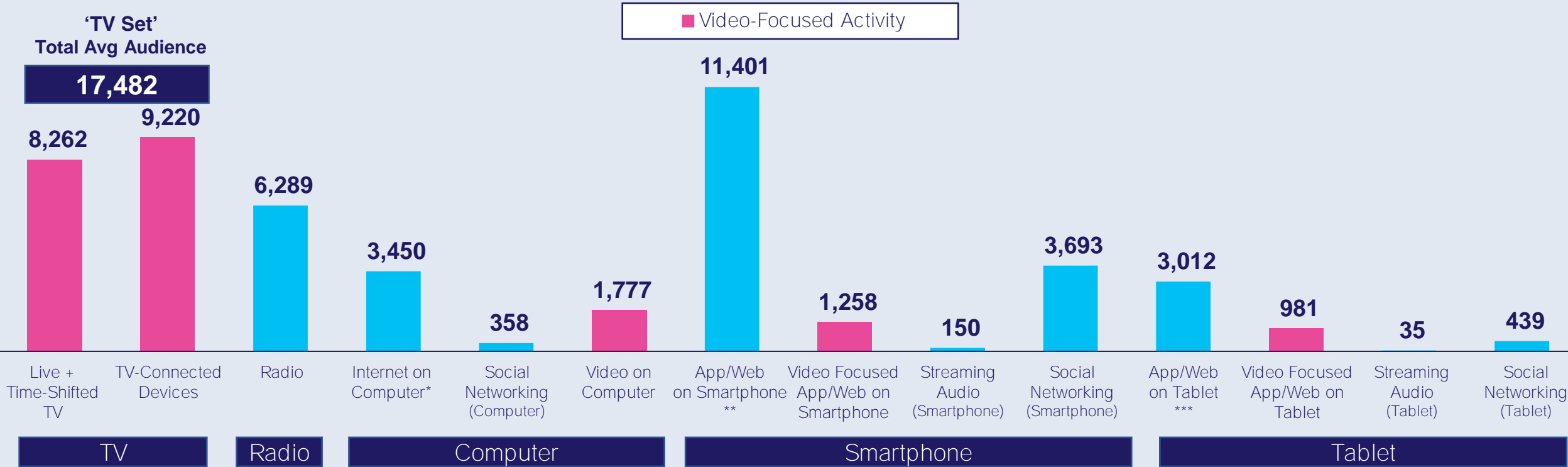
A18-49 Average Audience (000)



Source: VAB analysis of data from the Nielsen Audience Insights, Q3 2022. Based on weekly time spent in hours:minutes among U.S. population, A18-49. 'TV set' = live + time-shifted TV & TV-Connected Devices. Nielsen, 2021-2022 National Universe Estimates. *Internet on computer inclusive of social networking on a computer. **App/web on a smartphone inclusive of video focused app/web on a smartphone, streaming audio on a smartphone and social networking on a smartphone. ***App/web on a tablet inclusive of streaming audio on a tablet and social networking on a tablet.

Between linear & connected TV, more adults 25-54 are watching content on their TV set in any given minute than any other device

A25-54 Average Audience (000)

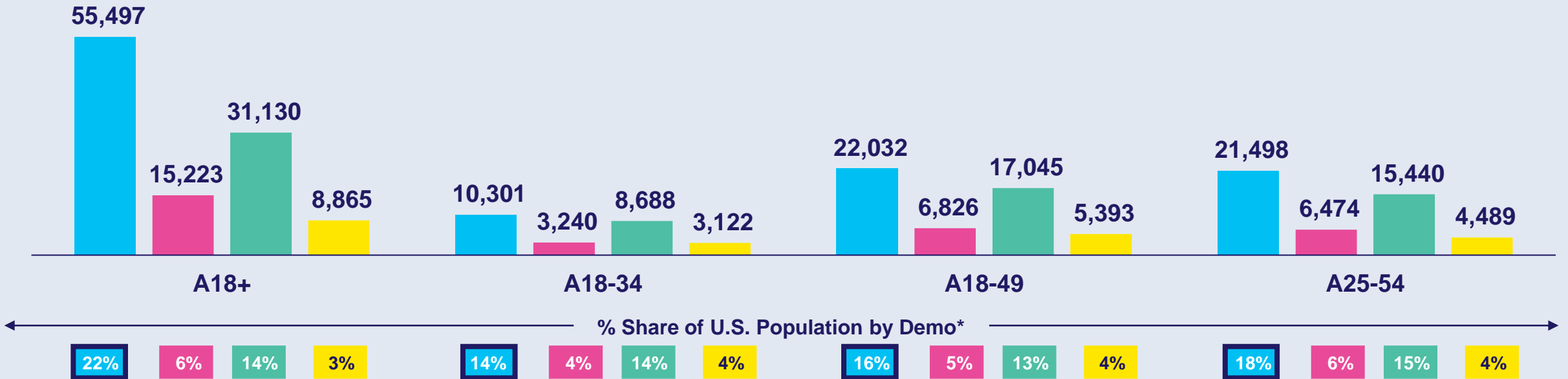


Source: VAB analysis of data from the Nielsen Audience Insights, Q3 2022. Based on weekly time spent in hours:minutes among U.S. population, A25-54. 'TV set' = live + time-shifted TV & TV-Connected Devices. Nielsen, 2021-2022 National Universe Estimates. *Internet on computer inclusive of social networking on a computer. **App/web on a smartphone inclusive of video focused app/web on a smartphone, streaming audio on a smartphone and social networking on a smartphone. ***App/web on a tablet inclusive of streaming audio on a tablet and social networking on a tablet.

In total, almost one-quarter of all adults are watching video on a device during any given minute

Average Audience (000) by Demo

■ Video ■ Audio ■ Internet (non-video) ■ Social Media

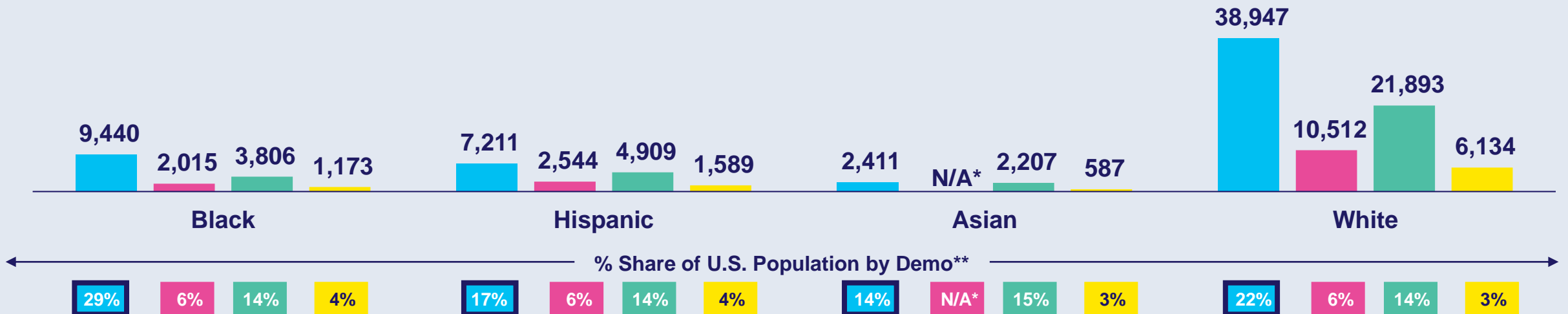


Source: VAB analysis of data from the Nielsen Audience Insights, Q3 2022. Based on weekly time spent in hours:minutes among U.S. population, A18+. 'Video' includes live + time-shifted TV, TV-connected devices, video on a computer, video focused app/web on a smartphone, video focused app/web on a tablet. 'Audio' includes radio, streaming audio on a smartphone, streaming audio on a tablet. 'Internet' includes internet on a computer, app/web on a smartphone (excluding video), app/web on a tablet (excluding video). 'Social media' includes social networking on a computer, social networking on a smartphone, social networking on a tablet. *U.S. population based on 2021-2022 National Universe Estimates from Nielsen.

Black audiences are much more likely to engage with video than any other media in any given minute

Average Audience (000) by Ethnicity

■ Video ■ Audio ■ Internet (non-video) ■ Social Media



Source: VAB analysis of data from the Nielsen Audience Insights, Q3 2022. Based on weekly time spent in hours:minutes among U.S. population, A18+. 'Video' includes live + time-shifted TV, TV-connected devices, video on a computer, video focused app/web on a smartphone, video focused app/web on a tablet. 'Audio' includes radio, streaming audio on a smartphone, streaming audio on a tablet. 'Internet' includes internet on a computer, app/web on a smartphone (excluding video), app/web on a tablet (excluding video). 'Social media' includes social networking on a computer, social networking on a smartphone, social networking on a tablet. *Radio usage data not available for Asian A18+. **U.S. population based on 2021-2022 National Universe Estimates from Nielsen.

3

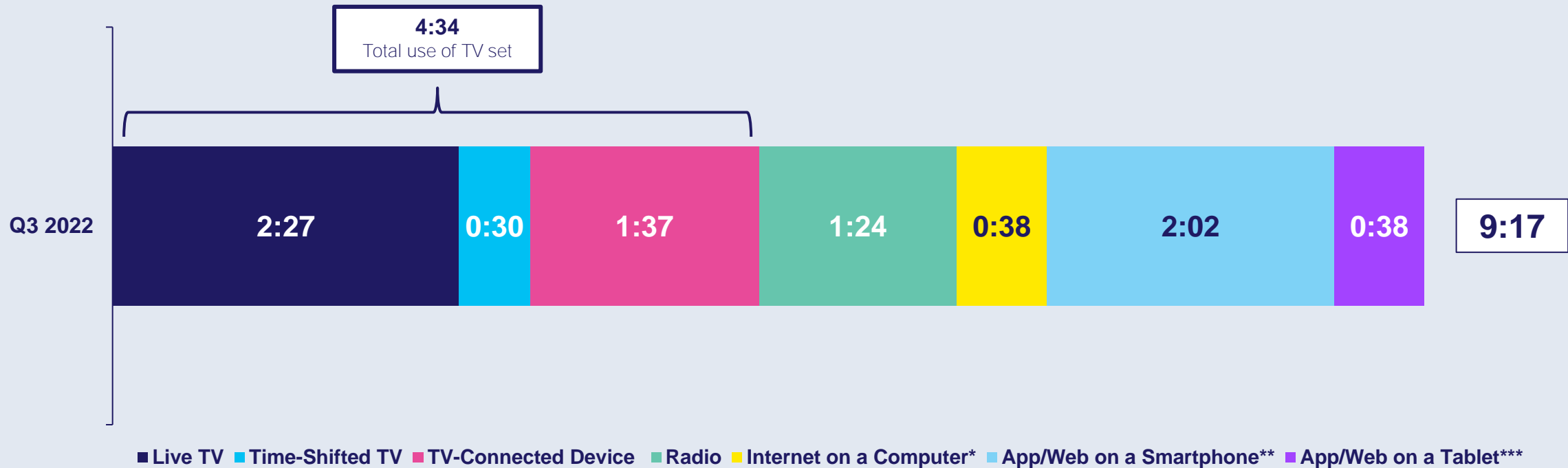
Reach & Time Spent By Media



Adults spend over 9 hours with media each day, half of which is with watching content on their TV set

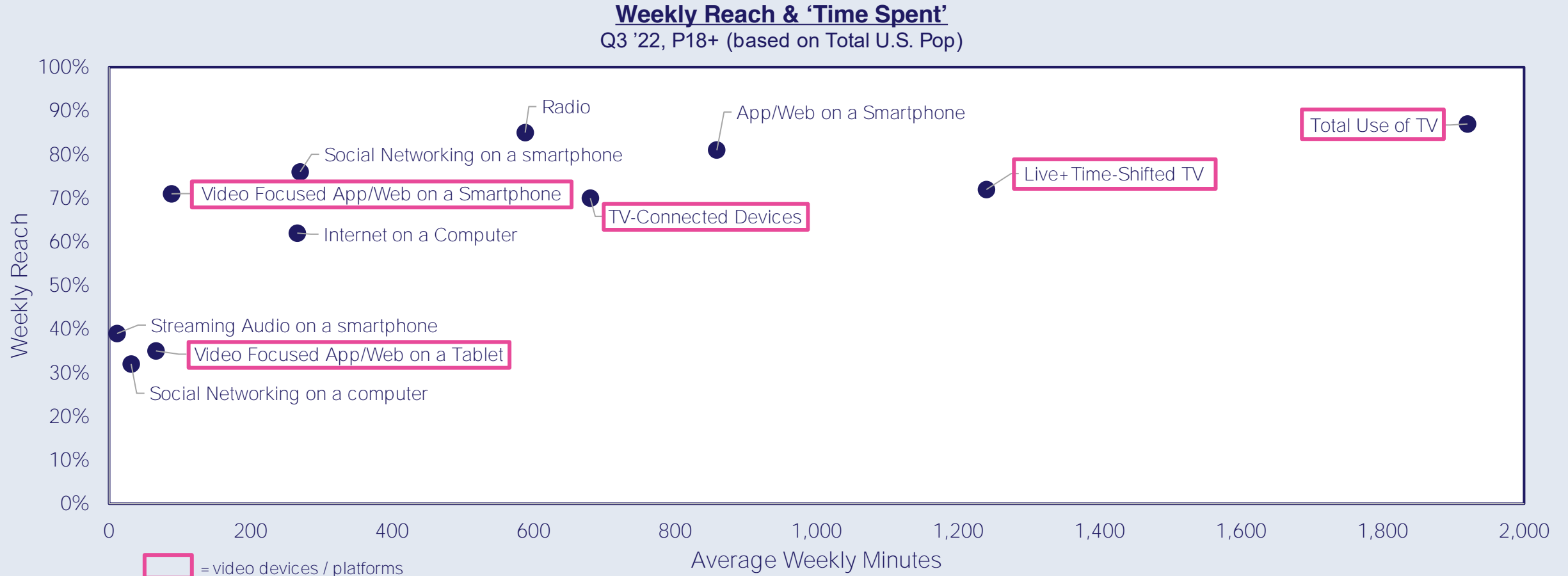
Average Daily Time Spent With Media Per Adult 18+

Based On U.S. Population
Q3 '22 (Hrs:Mins)



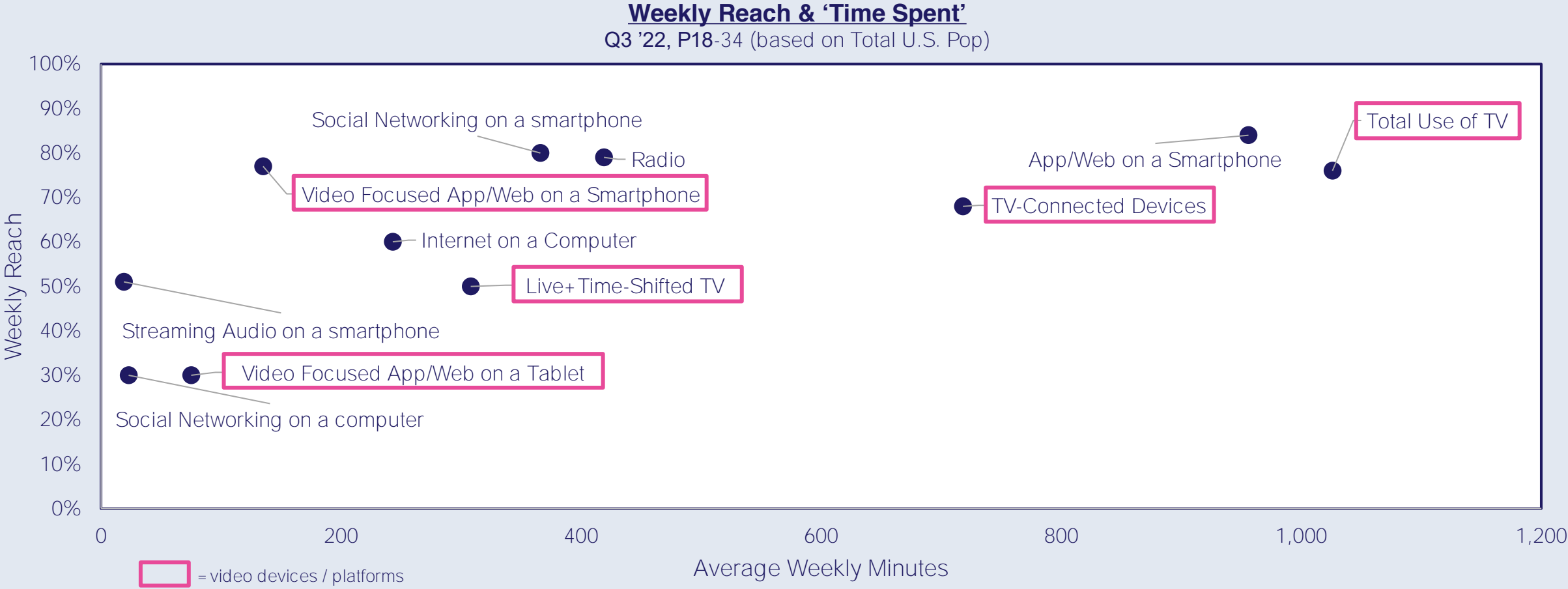
Source: VAB analysis of data from the Nielsen Audience Insights, Q3 2022. Note: Some amount of simultaneous usage may occur across devices. TV-Connected Device = DVD, game console, internet connected device; Internet Connected Device = devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. (inclusive of smart TV app usage). Note: Q4 '2021 is the most recent comparison period with available data prior to Q3 2022. *Internet on computer inclusive of social networking on a computer. **App/web on a smartphone inclusive of video focused app/web on a smartphone, streaming audio on a smartphone and social networking on a smartphone. ***App/web on a tablet inclusive of streaming audio on a tablet and social networking on a tablet.

The TV set is the leading device for reach and time spent among all adults



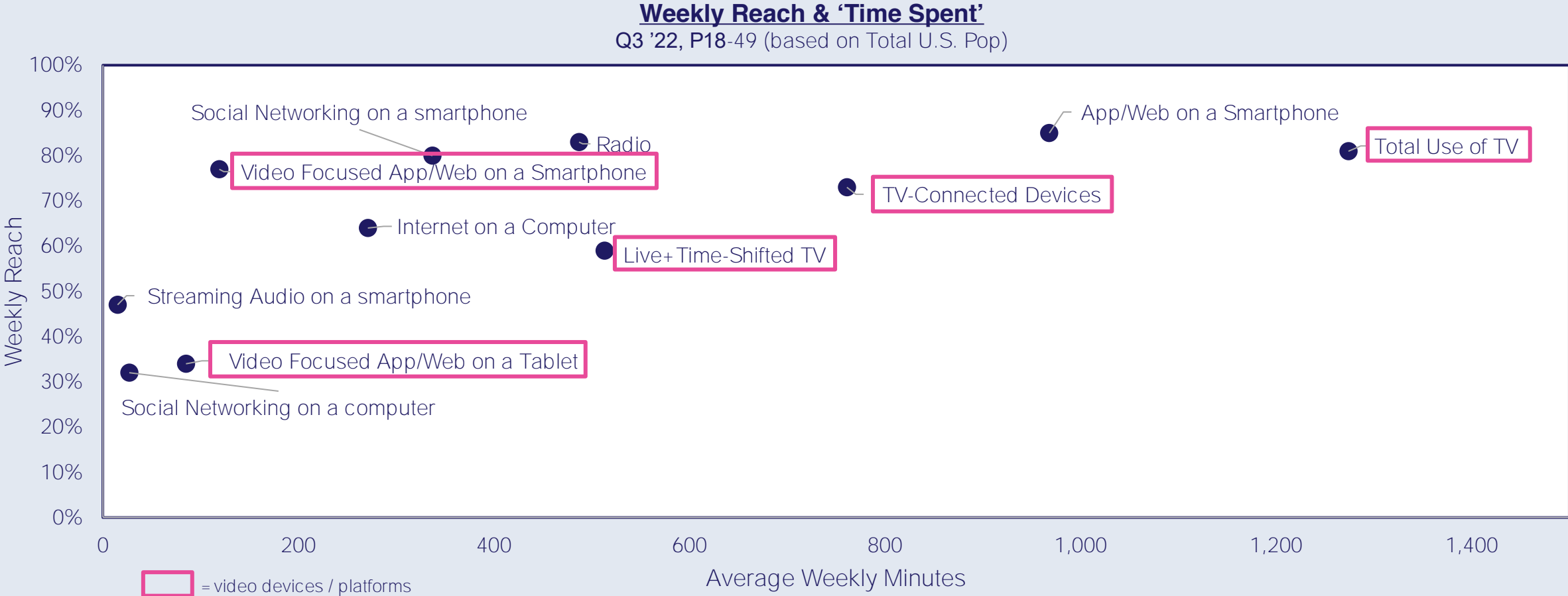
Source: VAB analysis of data from the Nielsen Audience Insights Data Tables, Q3 2022, time spent and percentage of users among U.S. population, P18+. TV-Connected Device = devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. (inclusive of smart TV app usage). Internet on a computer is inclusive of 'social networking on a computer. App/Web on a smartphone is inclusive on 'streaming audio' and 'social networking' on a smartphone. App/Web on a tablet is inclusive of 'streaming audio' and 'social networking' on a tablet. Video on a computer is excluded due to unavailable reach percentage data.

Young adults spend more time with the TV set than any other device, while smartphones and radio achieve slightly higher reach



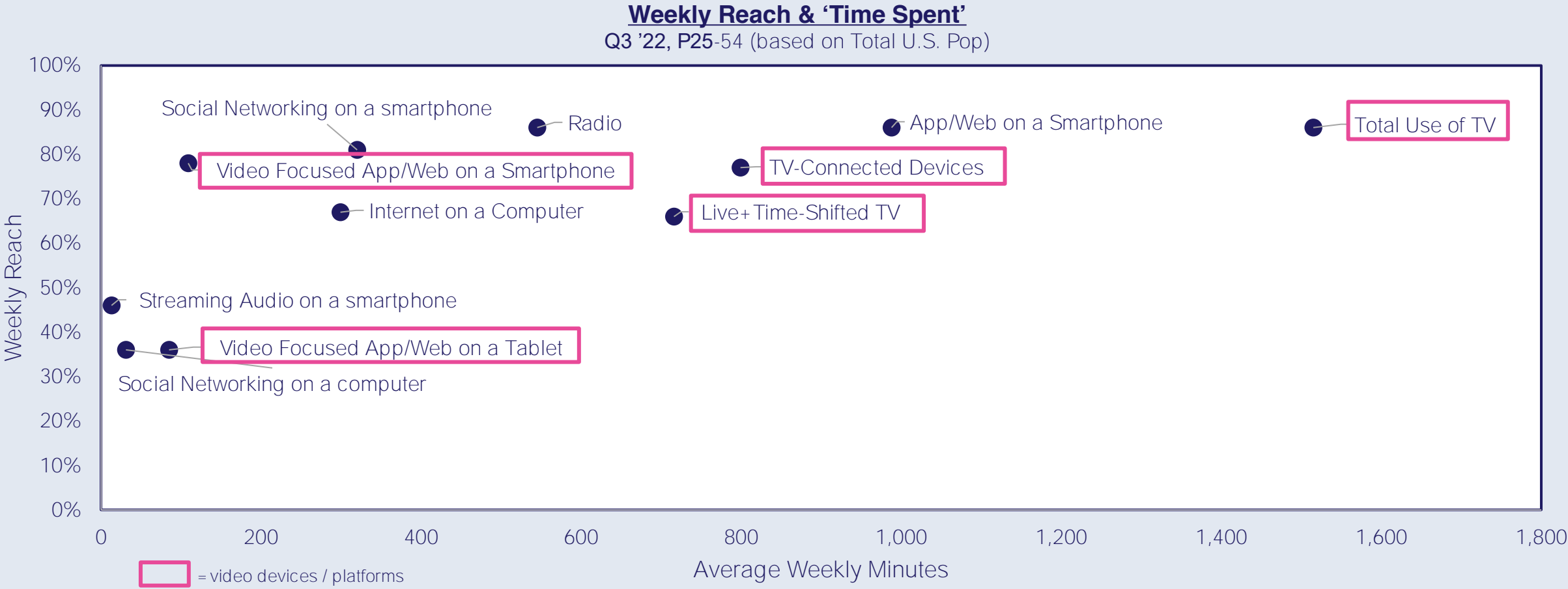
Source: VAB analysis of data from the Nielsen Audience Insights Data Tables, Q3 2022, time spent and percentage of users among U.S. population, P18-34. TV-Connected Device = devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. (inclusive of smart TV app usage). Internet on a computer is inclusive of 'social networking on a computer'. App/Web on a smartphone is inclusive on 'streaming audio' and 'social networking' on a smartphone. App/Web on a tablet is inclusive of 'streaming audio' and 'social networking' on a tablet. Video on a computer is excluded due to unavailable reach percentage data.

Adults 18-49 spend more time with the TV set than any other device, while smartphones and radio achieve slightly higher reach



Source: VAB analysis of data from the Nielsen Audience Insights Data Tables, Q3 2022, time spent and percentage of users among U.S. population, P18-49. TV-Connected Device = devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. (inclusive of smart TV app usage). Internet on a computer is inclusive of 'social networking on a computer. App/Web on a smartphone is inclusive on 'streaming audio' and 'social networking' on a smartphone. App/Web on a tablet is inclusive of 'streaming audio' and 'social networking' on a tablet. Video on a computer is excluded due to unavailable reach percentage data.

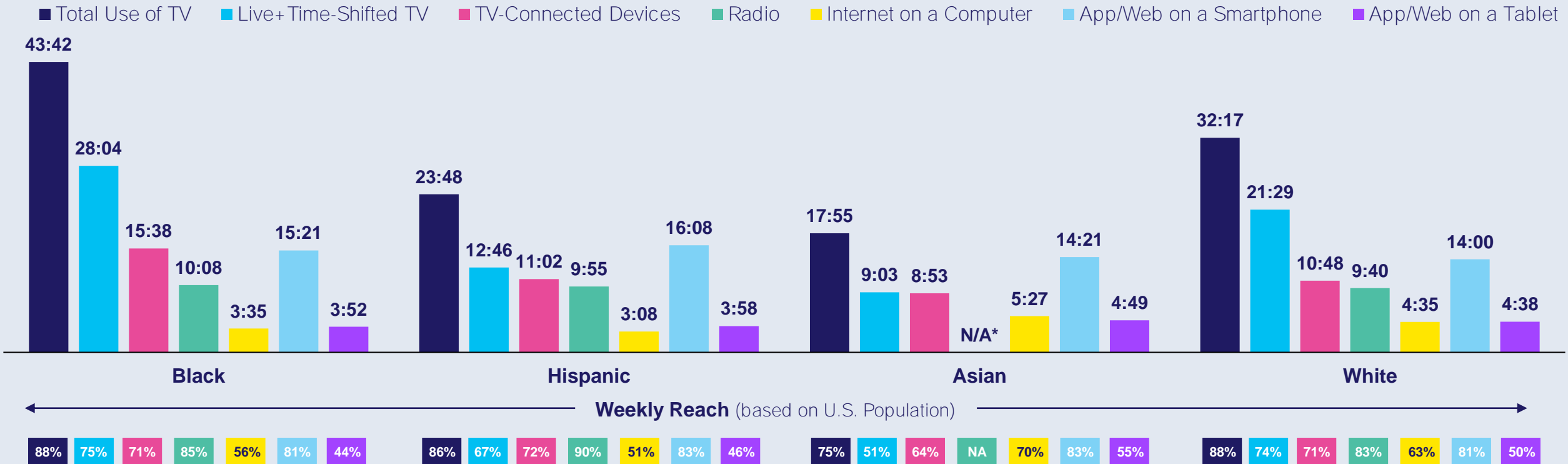
Adults 25-54 spend more time with the TV set than any other device and are on par with smartphones and radio for the highest reach by device



Source: VAB analysis of data from the Nielsen Audience Insights Data Tables, Q3 2022, time spent and percentage of users among U.S. population, P25-54. TV-Connected Device = devices connected to the TV that are used to stream content such as Apple TV, Roku, Google Chromecast, Amazon Fire TV, Smartphone, Computer/Laptops, etc. (inclusive of smart TV app usage). Internet on a computer is inclusive of 'social networking on a computer'. App/Web on a smartphone is inclusive on 'streaming audio' and 'social networking' on a smartphone. App/Web on a tablet is inclusive of 'streaming audio' and 'social networking' on a tablet. Video on a computer is excluded due to unavailable reach percentage data.

TV usage dominates time spent with media across all multicultural audiences

P18+ Average Weekly “Time Spent”
(Hrs:Mins Among U.S. Population)



Source: VAB analysis of data from the Nielsen Audience Insights, Q3 2022, hours:minutes among users, P18+. TV-Connected Device = DVD, game console, internet connected device. Total use of TV includes live + time-shifted TV and TV-connected devices. *Radio usage data not available for Asian A18+.

4

Content & Advertising Engagement



Sports and news are the most popular genres to watch live on a weekly basis, while episodic TV series are a mix of live and on-demand viewing

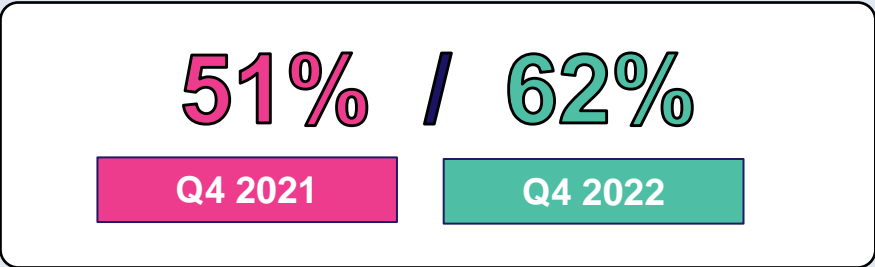
% Report Watching At Least Weekly
December 2022, Among Live TV + VOD subscribers



Source: DIRECTV Advertising, *Cutting Through the Clutter- Driving tune-in and Retention Amid Unprecedented Show Discovery*, January 2023.

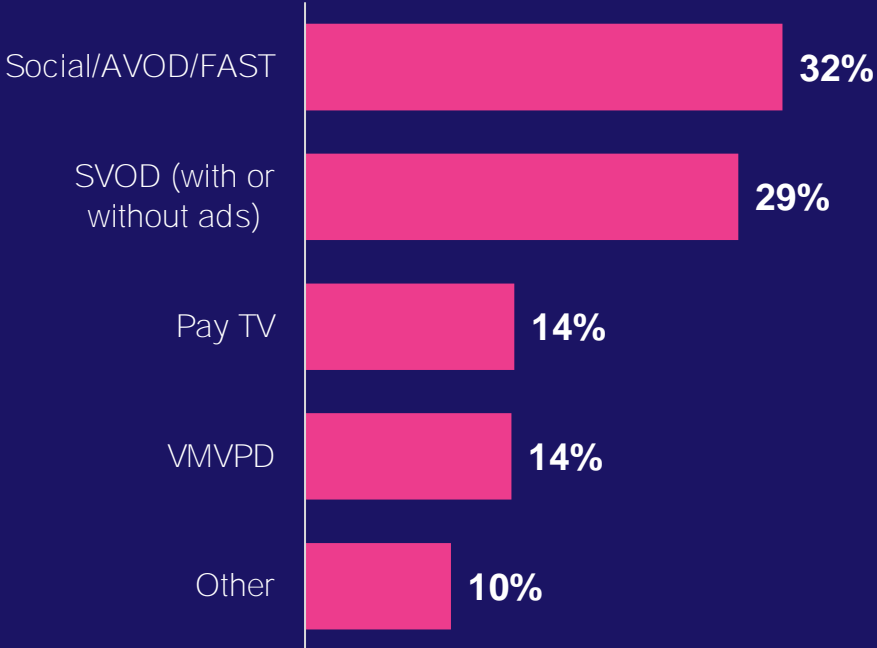
People are also increasingly watching content outside of their homes, like social and streaming, which creates more targeted ad opportunities

▶ 56% of respondents who reported watching video away from home reported doing so regularly while in transit



Types of Content Most Watched Away from Home

% of respondents who watched video away from home

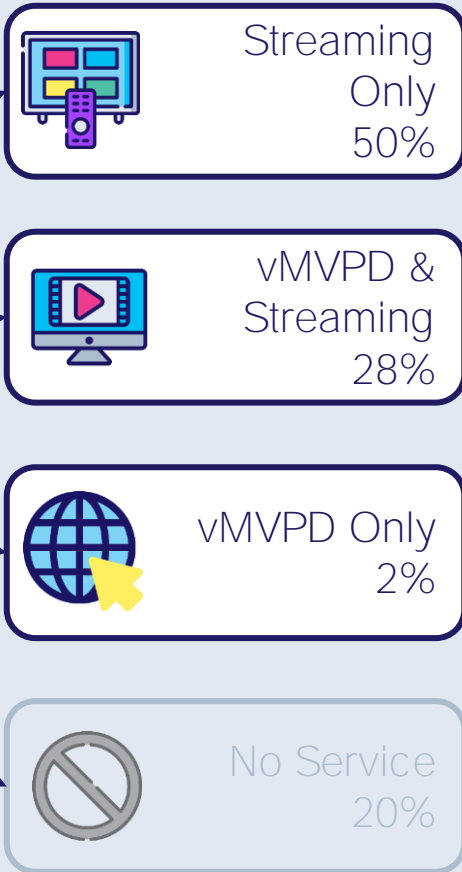


Source: TiVo, Video Trends Report, Q4 '22.

'Non-TV' households are TV viewers too as 80% watch TV content on other devices, which underscores the importance of cross-platform reach

5%
of U.S. HHs have no TV set

However, many of those homes watch TV content on other devices
(4% of total U.S. households)



Source: ARF DASH study, *DASH: Building a New Standard of TV*, AudienceScience 2023 conference presentation.

Between CTV and set-top box VOD, over 80% of premium digital ad views come from the television set

Ad view composition by device

2H 2022

■ CTV ■ Mobile ■ STB VOD ■ Desktop



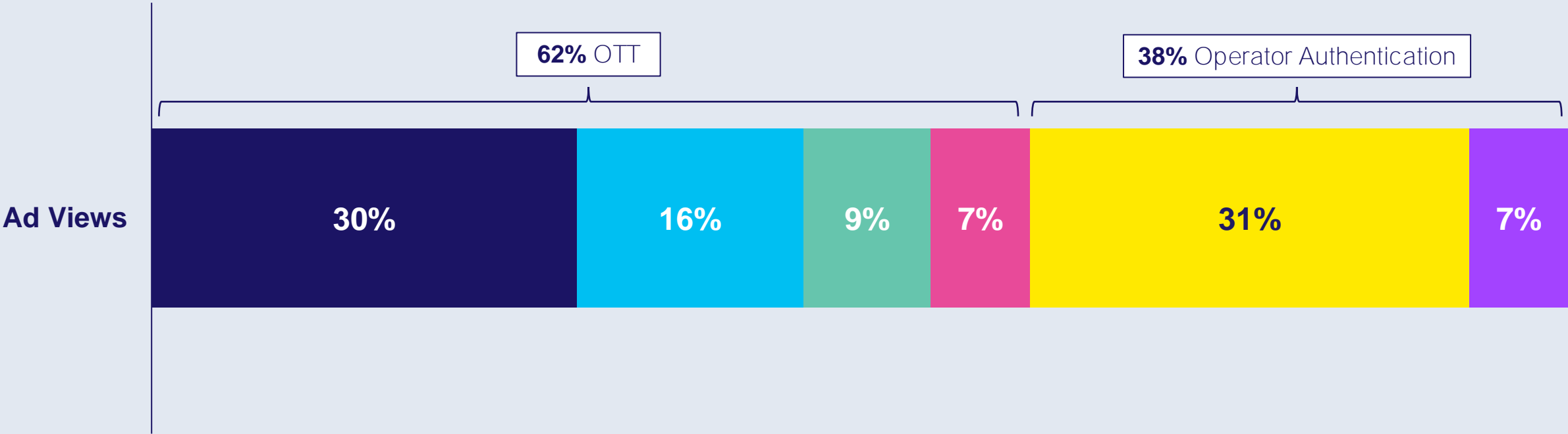
Source: Freewheel, Video Marketplace Report - Fast Channels Redefine Distribution, 2H 2022. Reflects U.S. data only.*

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

% share of ad views by distribution platform

2H 2022

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



Source: Freewheel, Video Marketplace Report, 2H 2022. DTC = direct-to-consumer apps from publishers.

Key Marketer Takeaways

- ▶ For the consumer, TV is both linear and streaming and, while the TV set is viewed as the primary device, many others also include content across platforms in their definition
- ▶ In any given minute, more people are engaging with video content, especially through their TV set but also their mobile devices and computers as well, than any other type of content
- ▶ TV, through both linear and connected devices, dominates time spent with media across key age demographics and ethnicities
- ▶ Whether its live or on-demand, in the home or outside of it, on the TV set or across other devices, TV provides many ways to foster engagement through content and advertising opportunities

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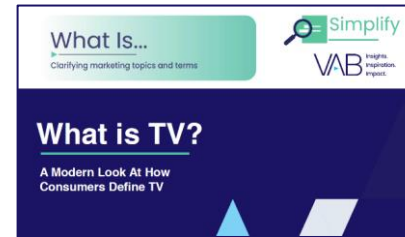
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We're here to help.

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.



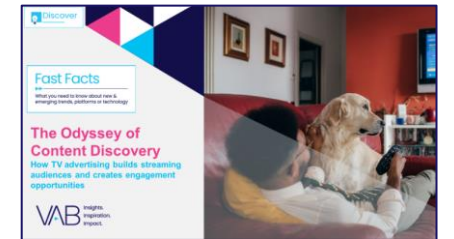
What is TV?
A Modern Look At How Consumers Define TV



Welcome to TV
Full Year 2022 Update



You Oughta Know
Why All Impressions Aren't Created Equal & What It Means For Video Measurement



The Odyssey of Content Discovery
How TV Advertising Builds Streaming Audiences and Creates Engagement Opportunities



25 Ways TV Grows Brands
Powering Performance Through Full-Funnel Business Outcomes



Setting the Stage
15 Streaming Trends That Will Impact Marketing Plans in 2023

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