



2020 – Volume VII

A Second Look

10 Slides to Help Marketers Extend
Reach Through Video Streaming

About VAB

VAB is an insights-driven organization that inspires marketers to reimagine their media strategies resulting in fully informed decisions.

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.

Simplify

We save you time by bringing you the latest data & actionable takeaways you can use to inform your marketing plans.

Discover

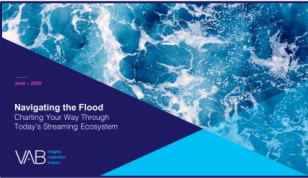
We keep you one step ahead with the latest thinking so you can create innovative, forward-looking strategies.

Transform

We help you build your brand by focusing on core marketing principles that will help drive tangible business outcomes.



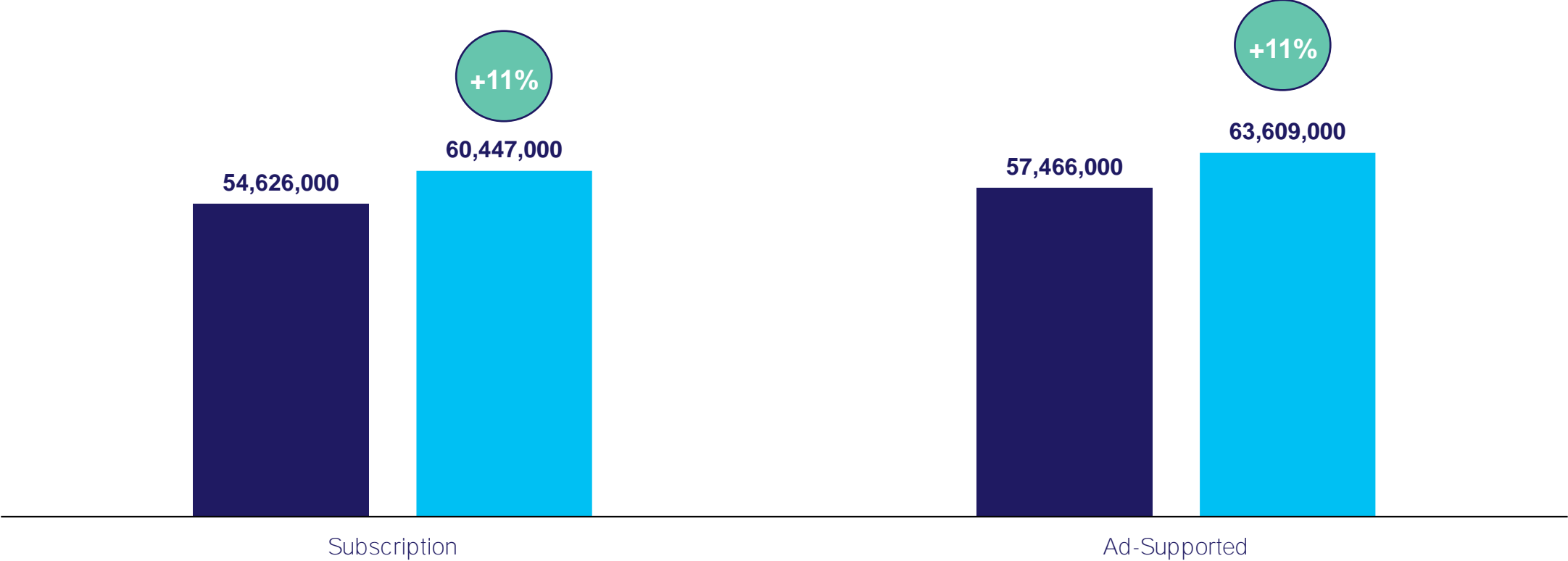
Even before the pandemic, rising interest in TV-related tech attributed to the growth in video streaming services, with household reach increasing 11% from January to March 2020



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Streaming Services HH Reach % Growth

January 2020 vs. March 2020



Source: Comscore, April 2020.

With more 'free' time during the pandemic, video streaming has become a **habitual, daily activity** for over half of **adults 18-44** and **households with children**

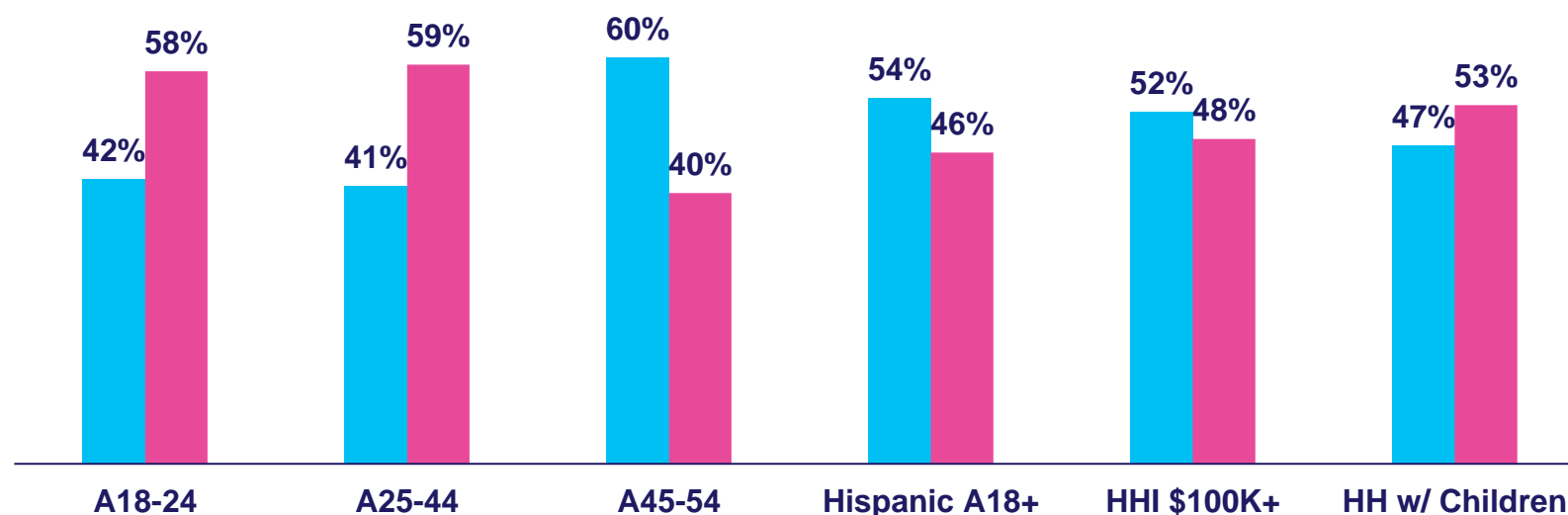


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On average, how many times per week do you watch a video streaming service?

■ Not daily ■ Daily or multiple times a day



Source: VAB / Lucid 'COVID-19 Streaming Behavior Survey,' June 2020. Survey base: A18+ in households with access to streaming services and have viewed content on streaming services (n=1,000). S3. On average, how many times per week do you watch a video streaming service? (e.g., Netflix, Disney +, Tubi, Hulu, CBS All Access, etc.)

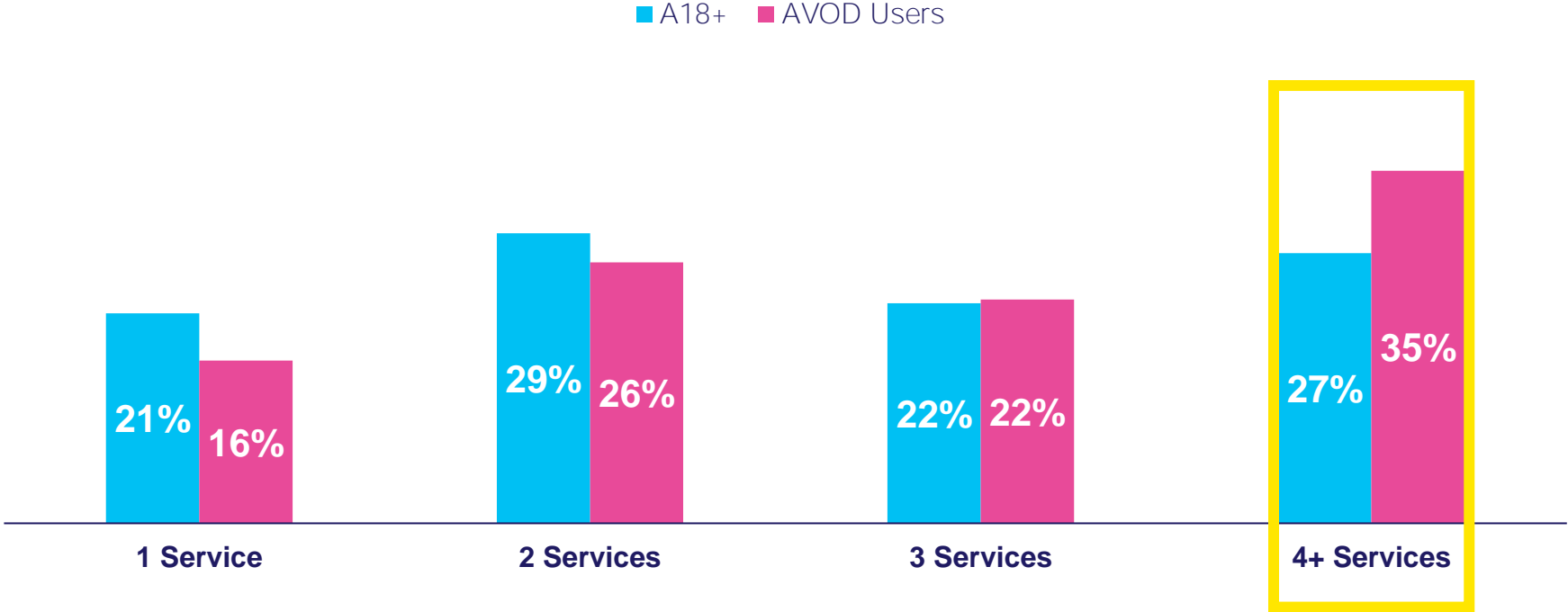
Viewers' access to more services has risen as streaming usage increases – over **one-third** of AVOD users now have access to **4 or more** services



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How many streaming services does your household currently have access to?



Source: VAB / Lucid 'COVID-19 Streaming Behavior Survey,' June 2020. Survey base: A18+ in households with access to streaming services and have viewed content on streaming services (n=1,000). Q2. How many streaming services does your household currently have access to? **AVOD Users** = respondents who regularly watch free subscription streaming services with commercials (e.g., Crackle, Pluto TV, Tubi TV) (n= 298).

Due to heightened interest and attention during COVID-19, trial and adoption of AVOD services accelerated, with **1 in 4 viewers stacking** AVOD subscriptions on top of paid



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27%

of SVOD users also subscribe to **AVOD services**

75%

of AVOD users also access SVOD services

Source: VAB / Lucid 'COVID-19 Streaming Behavior Survey,' June 2020. Survey base: A18+ in households with access to streaming services and have viewed content on streaming services (n=1,000). Q5. Which of the following streaming service types do you watch regularly? Does not equal 100% due to the ability to choose multiple responses. **AVOD Users** = respondents who regularly watch free subscription streaming services with commercials (e.g., Crackle, Pluto TV, Tubi TV) (n= 298). **SVOD Users** = respondents who regularly watch paid subscription streaming services with no commercials (e.g., Netflix, Disney+) (n= 817).

Nearly 4 in 10 AVOD users wish there were more free streaming video services because of their desire for even more premium original and library content on demand



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Which of the following statements about streaming video content do you agree with?

% of respondents who agree completely

AVOD Users



72%

“I like the large selection of TV shows and movies they offer”



67%

“I like having access to every show, past or present”



58%

“I enjoy the original content the service offers”

Source: VAB / Lucid 'COVID-19 Streaming Behavior Survey,' June 2020. Survey base: A18+ in households with access to streaming services and have viewed content on streaming services (n=1,000). Q3. When thinking about streaming video services, how much do you agree with the following statements? Does not equal 100% due to the ability to choose multiple responses. **AVOD Users** = respondents who regularly watch free subscription streaming services with commercials (e.g., Crackle, Pluto TV, Tubi TV) (n= 298). Q10. Which of the following statements describe your views on free streaming services? (e.g., Tubi, Pluto, Crackle , etc.)

AVOD users are **not deterred by advertising**, in fact they acknowledge that ads make their viewing experience more affordable



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Which of the following statements about streaming video content do you agree with?

% of respondents who agree completely

“I appreciate the fact that ads are making this service cheaper for me”

AVOD Users
53%

A18-34
41%

A35-54
35%

“I don’t mind seeing ads in free streaming programming”

AVOD Users
35%

A18-34
25%

A35-44
30%

Source: VAB / Lucid ‘COVID-19 Streaming Behavior Survey,’ June 2020. Survey base: A18+ in households with access to streaming services and have viewed content on streaming services (n=1,000). Q10. Which of the following statements describe your views on free streaming services? Q12. Which of the following statements about advertisements that appear in streaming services that have ads do you agree with? Does not equal 100% due to the ability to choose multiple responses. **AVOD Users** = respondents who regularly watch free subscription streaming services with commercials (e.g., Crackle, Pluto TV, Tubi TV) (n= 298).

Due to restrictions around large gatherings, **livestreaming** has **grown in popularity** and is creating more ad opportunities

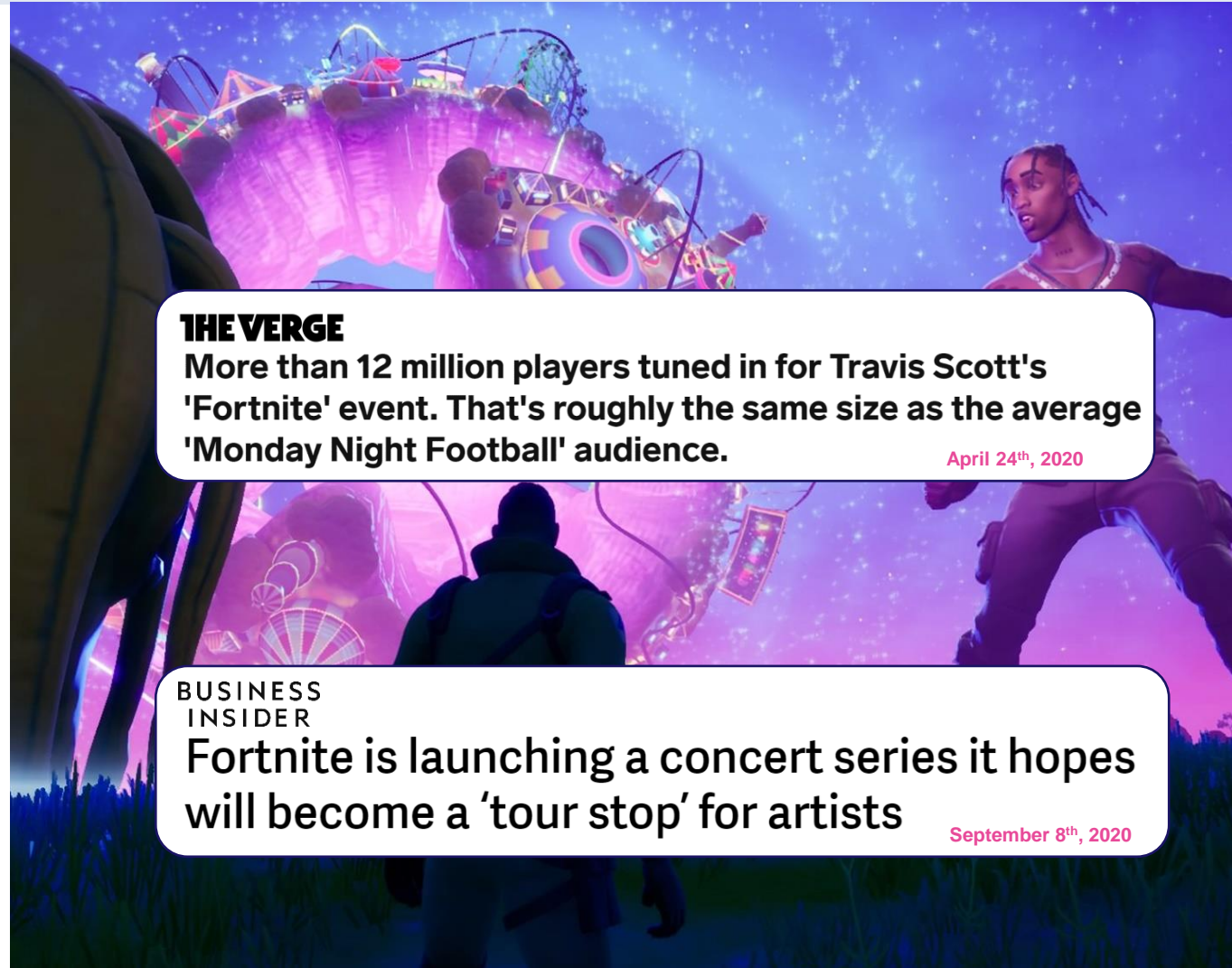
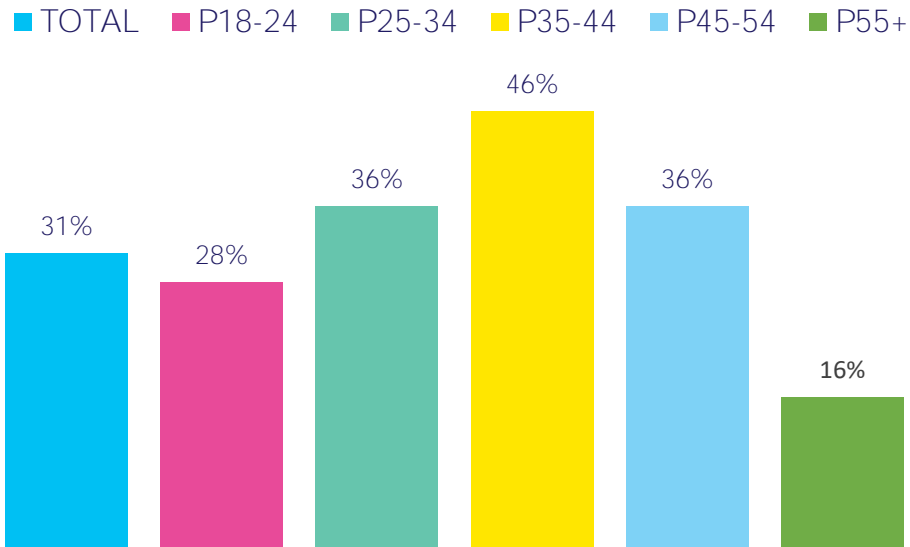


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▶ Nearly **one-third** of all adults are tuning in and enjoying the livestream of **events** like Travis Scott's 'Fortnite' concert

"I have livestreamed concerts and / or events while in quarantine"

% who agree



THE VERGE

More than 12 million players tuned in for Travis Scott's 'Fortnite' event. That's roughly the same size as the average 'Monday Night Football' audience.

April 24th, 2020

BUSINESS INSIDER

Fortnite is launching a concert series it hopes will become a 'tour stop' for artists

September 8th, 2020

Source: VAB / Lucid 'COVID-19 Streaming Behavior Survey,' June 2020. Survey base: P18+ in households with access to streaming services and have viewed content on streaming services within the past seven days (n=1,000). Q14. When thinking about livestreaming, by which we mean: streaming a program online live as it happens (e.g., Concert - One World: Together at Home, Sporting Event - Virtual NFL Draft) - which of the following statements do you feel apply to you?

Livestreaming as a format is poised for even greater growth as more events become virtual and, in a post-pandemic world, more virtual experiences are created as a complement to live, in-person events



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“I haven’t livestreamed an event or concert, but would consider if there was something that interested me”
% who agree



37%

P18+



42%

P18-24



29%

Single

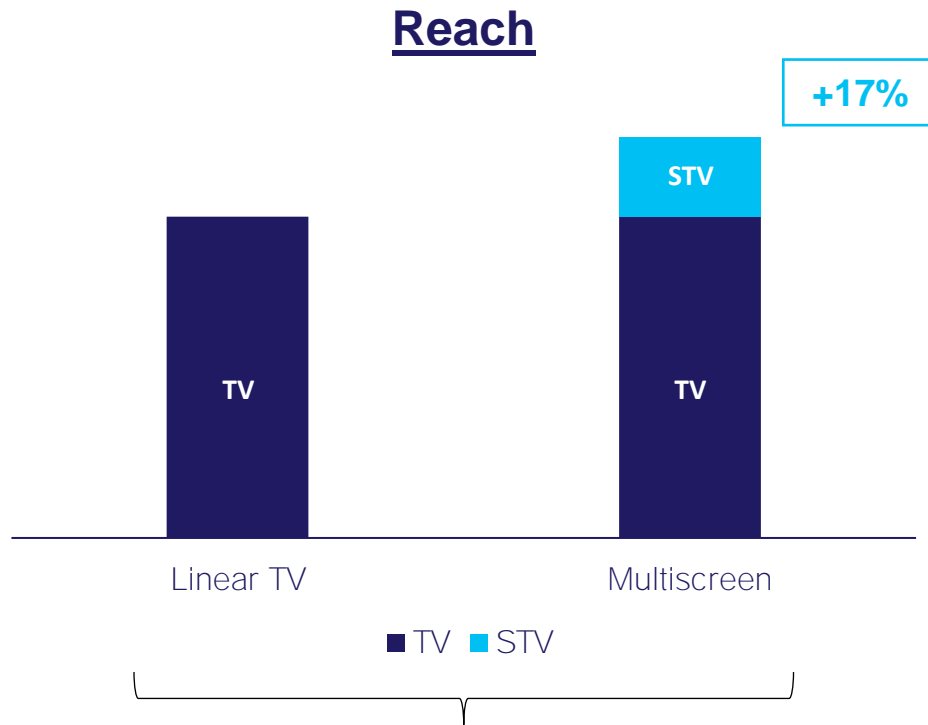
Source: VAB / Lucid ‘COVID-19 Streaming Behavior Survey,’ June 2020. Survey base: P18+ in households with access to streaming services and have viewed content on streaming services within the past seven days (n=1,000). Q14. When thinking about livestreaming, by which we mean: streaming a program online live as it happens (e.g., Concert - One World: Together at Home, Sporting Event – Virtual NFL Draft) - which of the following statements do you feel apply to you?

Combining streaming and linear TV within an ad campaign can drive **double-digit increases in incremental reach and frequency** for advertisers

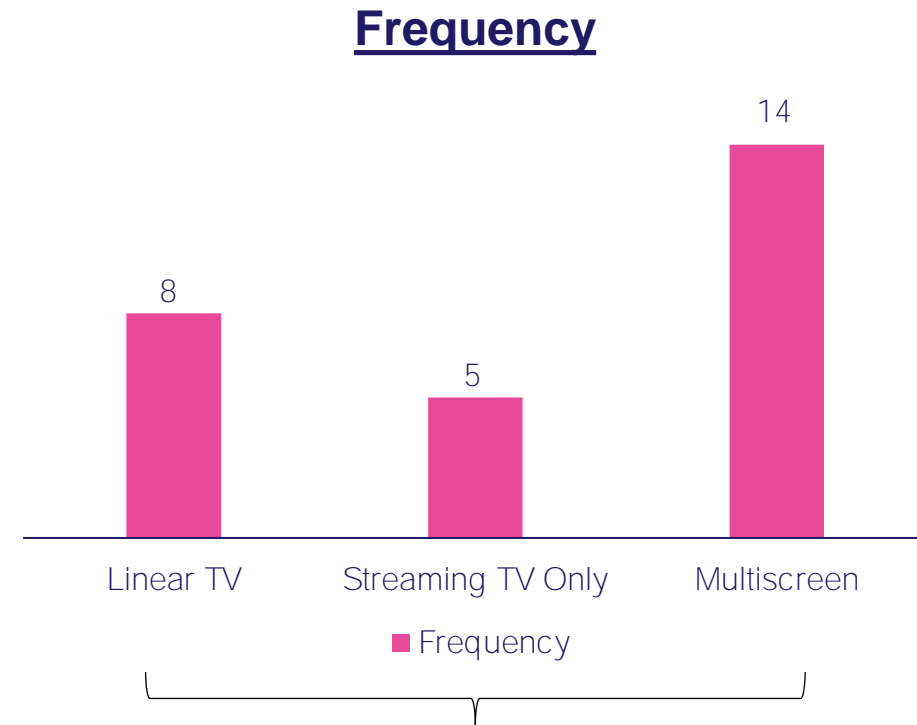


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Spectrum
REACH®



On average, adding Streaming TV to a Linear campaign will deliver an **incremental 17% lift in Reach***



The **average Frequency of a Multiscreen campaign is 14**, compared to an 8 with TV only, and a 5 with Streaming TV only*

Source: Spectrum Reach, *Streaming TV*, 2020. Spectrum Reach AM Campaign Data. Date – 1st & 2nd Quarter 2020. O&O Only. *Includes all campaigns with Streaming TV & Linear. N = Total Campaigns – 1,202. Linear = 85% Reach / Streaming TV = 20% Reach. Duplication = 6%. Streaming TV Life - % of new HHS reached.

With the significant growth in ad-supported streaming creating more available inventory, **revenues are projected to more than double** over the next five years



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Source: Digital TV Research via Cynopsis Media (North American AVOD Revenues), May 19, 2020.

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