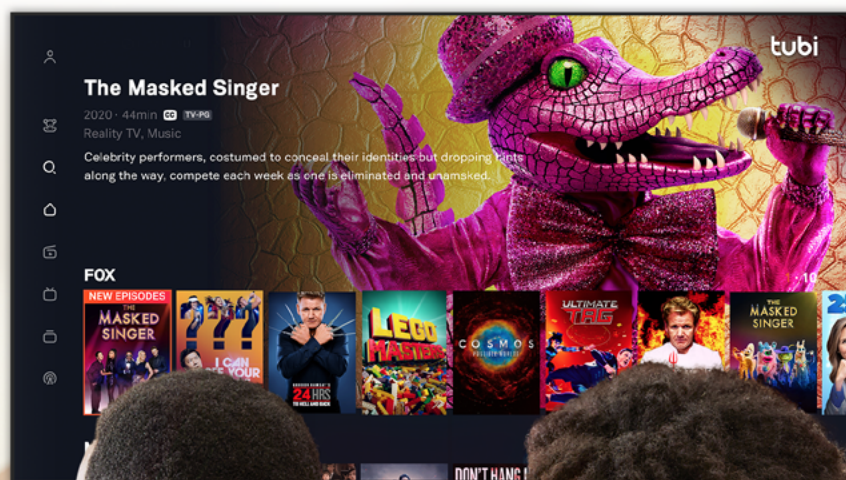




# THE STREAM



2021

# ACTIONABLE AUDIENCE INSIGHTS

FOR BRANDS

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# KEY STATS

## GROWTH TRENDS AND INSIGHTS

### TUBI STREAMERS



#### MASSIVE:

One of the largest streaming audiences with a huge library of content. Tubi has more than:

- | **2.5B** Hours streamed in 2020
- | **33M** Monthly Active Users
- | **30k** Titles



#### GROWING:

Similar to general OTT Trends, Tubi saw a big jump in viewership and time spent in 2020.

- | **1.9x** Growth in streaming hours since 2019
- | **58%** Increase in viewership over the past 12 months



#### YOUNG, DIVERSE, AND NATIONALLY REPRESENTATIVE:

On average, Tubi Streamers are 20+ years younger than linear TV audiences.



#### CABLE-FREE:

Nearly half of Tubi Streamers can't be reached via cable, especially the younger streamers (18-34).

- | **48%** of Tubi Streamers don't subscribe to cable (Index 126).
- | **57%** of 18-34 years olds don't subscribe to cable.

eMarketer projects streaming use to outpace cable subscription households by 2023, when access to 64.4M households will exclusively default to streaming.



#### NET NEW:

As an ad strategy, the majority of Tubi Streamers are incremental to linear and other AVOD platforms.

- | **80%** of Tubi's Streamers can't be reached across the top 25 cable TV networks. (**Linear TV**)
- | **68%** of Tubi Streamers can't be reached on other **AVODs**
- | **64%** of Tubi Streamers can't be reached across **FOX Entertainment**



# KEY STATS

## GROWTH TRENDS AND INSIGHTS

### TUBI ADS



#### VALUABLE AD EXPERIENCE:

Tubi's Ad Experience doesn't just result in higher engagement from streamers, it also creates a positive brand experience that drives brand lift, store visits, and overall ROI.

**TV First Streamers:** 4 out of 5 (84%) streamers watch Tubi on their TV.

**Strong Co-Viewing:** 85% of Tubi Streamers live in households of 2 or more people — often resulting in 2X+ more eyeballs per impression.

**Advanced Frequency Management:** Nearly 2 out of 5 marketers said they'd invest more in streaming if they could better manage ad frequency. Early tests of Tubi's proprietary Advanced Frequency Management solution indicates a 366% reduction in over-frequency and a significant increase in reach.

**Above Benchmark Impact:** A recent CPG campaign achieved a 41% lift in ad awareness, 2X above the Kantar Millward Brown CPG snack video benchmark. And the investment increased purchase consideration by 47% among lapsed customers.

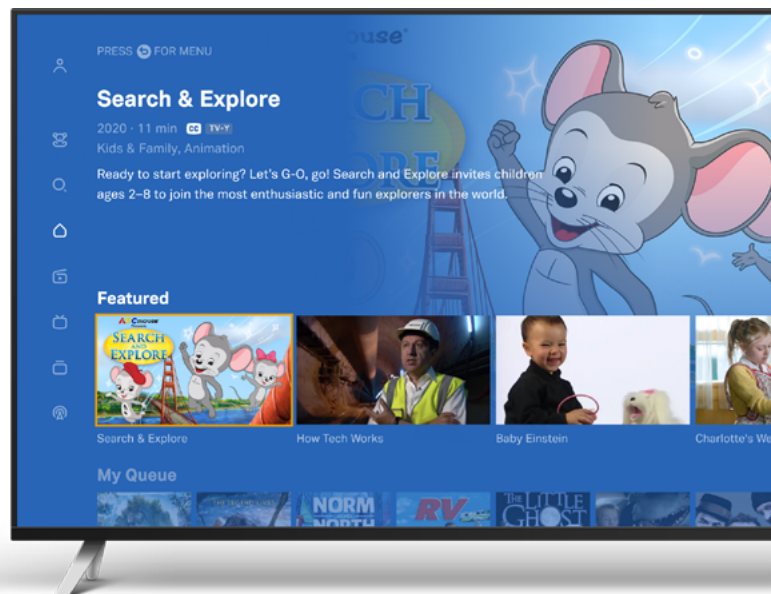


#### A BRIGHT FUTURE IN 2021:

Brands who've invested in streaming rate it as more effective than both linear and digital video.

**66%** of brands plan to increase their streaming ad budgets, in the next 6 months.

**1 in 5** brands will devote a quarter of their entire video budget to streaming TV.





# INTRODUCTION

In 2016, streaming went mainstream. No longer an emerging force, it flooded the market, permanently altering the cultural landscape. The video revolution has already happened.

And from it, a fully emerged ad-supported audience was born:

## *the* **Streamers.**

Streaming today is what The Howdy Doody Show was to boomers, what John Hughes films are to GenXers, and what cellphones are to millennials. Streamers didn't grow up with TV — to them,

**STREAMING** *is* **TV.**

In 2021, the advertising landscape is cementing a shift of its own. As advertising-based video on demand (AVOD) platform growth soars, so does the opportunity for a major shift in advertising budgets.

And Tubi, FOX's breakthrough streaming platform, is uniquely positioned to provide both streaming and linear insights across audience composition, content consumption, and the behavioral changes shaping the future of TV viewing.

***The Stream: 2021 Actionable Audience Insights for Brands*** leverages extensive research, including a backstage look at Tubi's own first-party audience data. In doing so, it brings to life the missing day part of your TV buy: the otherwise unreachable Streamer.

# INTRODUCTION

## 5 Industry Insights TO SHAPE YOUR AD STRATEGY IN 2021

Tubi's research points to five insights shaping streaming and TV ad strategies in 2021. Individually, each significantly impacts the video content landscape. Together, they're transforming it entirely.

### | 01

The majority of Streamers are unreachable through cable TV. Tubi, for example, represents an 80% incremental audience to the top 25 cable networks.<sup>1</sup>

### | 02

Growth in streaming has given Streamers more choices than ever to get the content they love. And in turn, brands have more options to access incremental TV audiences. On average, users subscribe to 3.8 platforms and, more than 3 out of 5 Tubi Streamers are also on Netflix.<sup>2, 1</sup>

### | 03

A Linear-only approach is no longer sustainable — confirmed by every network who's investing in streaming. Combining the loyal, older linear TV audience with younger Streamers will be key to reaching a nationally representative audience in 2021. Linear and streaming are truly better together.

### | 04

Video advertising budgets are increasingly prioritizing streaming platforms. However, they're still heavily skewed towards linear TV. This presents an opportunity for savvy brands in a still unsaturated digital video marketplace.

### | 05

And yet, after all is said and done, the main focal point in the COVID era and beyond will be to continually prove ROI. Reduced ad fatigue and increased incremental reach will be key to maximizing brand impact and conversion in 2021.

<sup>1</sup> MRI-Simmons, Cord Evolution Study, Nov 2020

<sup>2</sup> Media Play News: Ampere Analysis, SVOD Services per SVOD household

# THE STATE OF TV VIEWING

## STREAMERS ARE HERE.

### AND THANKS TO AVOD, BRANDS CAN REACH THEM.

For nearly a century, brands have had to adapt with the times, from broadcast to data targeting to now, streaming. As technology and consumer behaviors have evolved, so have ad strategies. Yet, the speed at which consumers change these days often leaves brands well behind the curve of adoption. The recent changes in TV viewing are no exception.

79% of people use streaming services to watch TV.<sup>3</sup> And yet, up to 90% of all video budgets still go to linear, according to eMarketer. In fact, linear TV ad spend actually increased slightly in 2020 — a testament to the power of broadcast, but a revealing stat about the growing imbalance of ad investments.



**65.6** BILLION DOLLARS  
WERE SPENT ON  
LINEAR TV IN 2020<sup>4</sup>

According to eMarketer, this is a slight increase from the year before.<sup>4</sup> One reason for this variance? Up until recently, reaching Streamers was not an option. Brands were left navigating the rough waters of a complicated TV advertising landscape plagued with subscriptions and walled gardens. Cue AVOD, which suddenly gave brands access to Streamers. Now, the coveted streaming audience that Netflix has held captive for years is available and scalable in a way that brands had only dreamed of.

<sup>3</sup> MRI-Simmons, Cord Evolution Study, Nov 2020

<sup>4</sup> eMarketer: Winterberry Group, Jan 2020

<sup>5</sup> Media Play News: Ampere Analysis, SVOD Services per SVOD household

## VIDEO CONTENT CONSUMPTION IS (STILL) ON THE RISE.

Video consumption has been increasing rapidly for years, and what's more, it hasn't shown signs of slowing down.



ON AVERAGE, CONSUMERS  
SUBSCRIBE TO NEARLY 4  
SERVICES PER HOUSEHOLD.<sup>5</sup>



*[Tubi's] pulling me away from these other services. I have Netflix, we have Hulu and a few others and I'm using Tubi more and more because it's got these easy to find shows.*



Anthony, 39

In 2020, eMarketer reported that Streamers watched nearly 13 hours of content a week, on average. They're going to watch even more in 2021.<sup>6</sup>



**2.5** BILLION HOURS STREAMED  
IN 2020 — 1.9X GROWTH IN  
STREAMING HOURS SINCE 2019<sup>7</sup>



**58%** GROWTH IN VIEWERSHIP  
FOR TUBI ALONE IN THE PAST  
12 MONTHS<sup>7</sup>

To keep up, platforms are investing in video content at an accelerated rate. Netflix, for example, reportedly spent \$17.3 billion in 2020, up from \$15.3 billion in 2019.<sup>8</sup>

<sup>6</sup> eMarketer, April 2020

<sup>7</sup> Tubi Audience Data, Dec 2020

<sup>8</sup> eMarketer: BMO Capital Market Corp, Jan 2020



# THE STATE OF TV VIEWING

## LINEAR TV VIEWERSHIP IS SHIFTING TO STREAMING.

It's anecdotally observable and statistically clear: cable and satellite companies are losing subscribers. Blame it on subscription fatigue, cost of cable, or dissatisfaction with customer service: all reasons people cite for leaving linear.



**48% OF TUBI STREAMERS DON'T HAVE CABLE<sup>9</sup>**

**37%**

Over 1/3 of Americans don't have cable<sup>9</sup>

**2021**



8.1 million more will cut the cord<sup>10</sup>

**BY 2022**



More households will be without cable than with<sup>10</sup>

**BY 2023**

Remaining cable households are skewing older (55+), meaning that a desirable younger demographic is increasingly unreachable via linear TV.

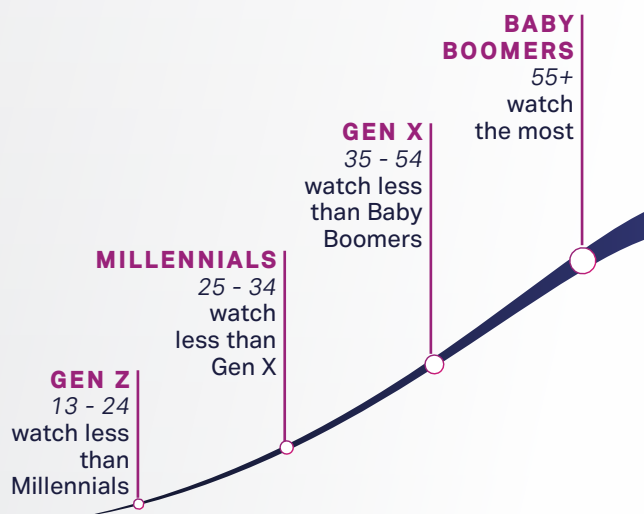
In 2021, 5 million people will cut the cord, getting rid of their traditional TV subscriptions, eMarketer estimates. By 2022, over 95 million US adults will be Streamers.

## MOST YOUNG PEOPLE DON'T HAVE CABLE AND THE ONES THAT DO ARE WATCHING LESS OF IT.

Predictably, cord-cutters and cord-nevers are especially common among younger households. While millennials are screen-obsessed, linear TV is the glaring exception.

On average, the younger someone is, the less cable TV they watch per day.

The majority (57%) of 18 to 34 year olds don't subscribe to cable. And those that do watch less of it.<sup>9</sup>



**GEN Z SPENDS 3.5x LESS TIME WATCHING LINEAR TV THAN BOOMERS<sup>11</sup>**



**57% OF TUBI STREAMERS AGES 18-34 DON'T HAVE CABLE<sup>9</sup>**

## THOUGH TV VIEWERSHIP IS SHIFTING TO STREAMING, TRADITIONAL TV AD BUDGETS REMAIN CONSISTENT.

The power of traditional TV is a reliable medium for national reach & performance — and the expectation to both target and easily measure ROI is growing increasingly important to brands.

<sup>9</sup> MRI-Simmons, Cord Evolution Study, Nov 2020

<sup>10</sup> eMarketer, Sept 2020

<sup>11</sup> eMarketer, April 2020

# THE STATE OF TV VIEWING

Despite decreasing TV viewership, linear TV continues to dominate up to 90% of video ad spend.<sup>12</sup>

And there's no consensus among brands as to why TV is favored — a study commissioned by Tubi with Advertiser Perceptions found that marketers and brands didn't share any significant objections to investing in streaming.

But people do have questions. They're looking for more information, insights, and transparency.



**2 in 5** AGENCIES AND  
MARKETERS WERE UNCLEAR  
HOW STREAMING-BASED  
ADVERTISING WORKS<sup>13</sup>

Specifically, they're wondering about two things: how to manage ad frequency and how to gain more insight. Nearly 2 out of 5 brands said they'd invest more in streaming if they could better manage ad frequency. And the same percentage [2 out of 5] said they'd be likely to invest more in OTT ad buys if they could gain greater transparency into where and how their ads would run.

The concerns are valid, and the streaming industry is working diligently to address them. Tubi, for example, debuted its proprietary Advanced Frequency Management (AFM) tool in 2020. The AFM solution gives brands full control over their ad frequency across all demand sources, enabling brands to cap ad frequency at the campaign level as they see

fit. Tubi transcodes every ad that comes in, identifying if duplicates exist. This technology reduced over-frequency by 366% for a major insurance brand, thereby significantly increasing reach. A huge win for the industry. (More on that case study later.)

## TAKE NOTE: SAVVY BRANDS GOT AN EARLY START IN 2020

Digital video investment across Connected TV grew 27% in 2020, and is expected to total \$8.1 billion<sup>14</sup>. Though growing, it only accounts for 2.6% of the total media ad spend to date.

Networks, too, have followed suit, investing hundreds of millions of dollars in streaming acquisitions and partnerships.

In 2019, ViacomCBS bought Pluto TV. In 2020, Disney acquired majority stock of Hulu. The same year, Comcast bought Xumo, Xfinity launched Peacock, and most recently, FOX bought Tubi in the spring of 2020. Networks are placing big bets on the rapid expansion of the space, reminding us that they too recognize the importance of reaching Streamers.

What's more, the currently visible growth is just the beginning: if streaming merely maintains its current growth rate, it will be an unstoppable force in 2021. And networks clearly recognize the value of this incremental reach.

<sup>12</sup> eMarketer, Winterberry Group, Jan 2020

<sup>13</sup> Advertiser Perceptions Brand Tracking Study, Sept 2020

<sup>14</sup> eMarketer, US Connected TV Advertising 2020 Report, Oct 2020

# THE STATE OF TV VIEWING

Especially when it comes to reaching younger generations, supplementing linear TV strategy with streaming is proving necessary.

And brands agree. According to a recently commissioned study with Advertiser Perceptions, nearly a fifth of ad budgets are set to go to streaming in the next six months.

## STREAMING AD BUYS CAN BE JUST AS VALUABLE OR SOMETIMES MORE EFFECTIVE THAN TRADITIONAL TV.

In that same study, brands reported valuing streaming just as much, if not more than, traditional TV. This was true across several metrics, including total reach, the quality of the ad experience, quality of content, metrics measurement, demographic differences, and total reach.

In fact, when it comes to availability or quality of data, as well as ad buyers' preferences, streaming actually came out on top.

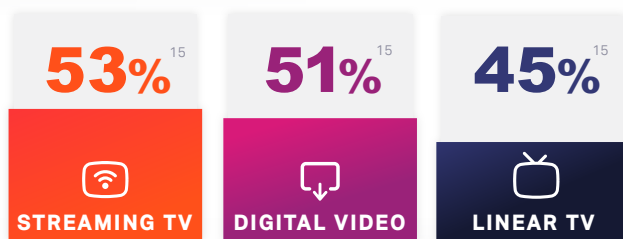
Streaming is actually acknowledged to be on par with or better than linear in several areas, including overall ad value.<sup>15</sup>

What's more, brands who've previously worked with streaming rate it as more effective than both linear *and* digital video.



In 2021, brands are starting to close the gap by allocating more of their ad budgets to streaming.

### PERCEIVED AD EFFECTIVENESS BY TACTIC



In fact, in the next six months, 1 in 5 will devote a quarter of their entire budget to streaming TV.<sup>15</sup>



BRANDS WITH STREAMING EXPERIENCE RATED IT AS 8% MORE EFFECTIVE THAN LINEAR, AND 2% MORE EFFECTIVE THAN DIGITAL VIDEO LIKE YOUTUBE.<sup>15</sup>



66% OF BRANDS WILL INCREASE THEIR STREAMING AD BUDGETS, IN THE NEXT SIX MONTHS.<sup>15</sup>



# HOW THE GLOBAL PANDEMIC HAS ACCELERATED THE STREAMING REVOLUTION

## MORE STREAMING: MORE PEOPLE STREAMING MORE HOURS

The global spread of COVID-19 has fundamentally altered how we spend our time. When the pandemic hit in March, streaming habits shifted tremendously.

According to Comscore's June 2020 report, two things happened: more people started streaming, and streaming more content. As shutdowns climbed, so did streaming households and hours.

Amid the unprecedented uncertainty of the pandemic, Americans began craving comfort in their screens. We looked to shows and movies to fill the void of our diverse hobbies — many of them altered or gone entirely. Every week in March, we streamed more TV than the week before.

In April we started to find some footing, and established our daily routines — or some semblance of them. We figured out how much streaming screen time felt good for us every day, and settled on a number (a big number) that held steady through the summer.

The interesting thing is, our average streaming screen time never actually returned to its pre-pandemic baseline. We just incorporated these extra hours into our daily routine.

At Tubi, this translated into a huge bump in viewership and demand for more diverse content.

## MORE CO-VIEWING: FAMILIES THAT STREAM TOGETHER, STICK TOGETHER

As Streamers are spending more time with their families and housemates, they're watching more content with them. Being able to enjoy communal entertainment safely at home has allowed people to feel a sense of bonding, relationship, and novelty. New releases give people something to look forward to, and old favorites provide needed comfort.

”

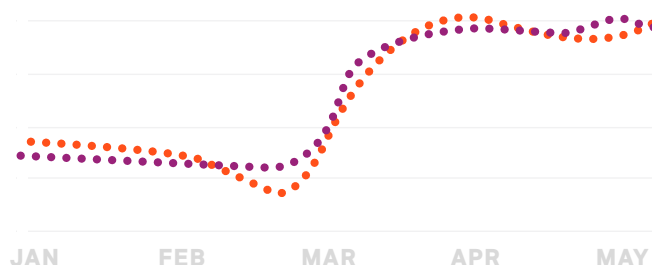
*[It's] been super helpful and just really nice, especially during quarantine — the amount of shows there is for young kids and like educational stuff — I really enjoy that compared to other platforms.*



Annie, 36

## TUBI'S GROWTH OUTPACED OTT CONSUMPTION WITH 31% JUMP IN STREAMERS<sup>16</sup>

- 14% JUMP IN OTT USERS<sup>17</sup>
- 25% JUMP IN OTT HOURS<sup>17</sup>



**58% INCREASE IN TUBI VIEWERSHIP IN THE PAST 12 MONTHS<sup>16</sup>**

<sup>16</sup> Tubi Audience Data, Dec 2020

<sup>17</sup> Comscore The State Of OTT Report, June 2020

# HOW THE GLOBAL PANDEMIC HAS ACCELERATED THE STREAMING REVOLUTION



With couples and families cooped up at home 24/7, the “How was your day?” question is no longer relevant. Watching a show together gives people something to talk about, and a new way to connect with each other.

And it’s more than just entertainment. As parents are juggling working from home and supervising their kids’ school work, educational programming has been a lifeline. Documentaries, science shows, and edutainment are dynamizing digital learning.

Overall, an increase in co-viewing translates into larger viewership for brands, achieving better ad value.

## MORE CORD CUTTING: PEOPLE ARE QUITTING CABLE FASTER

Unemployment is at an all time high. And as NPR’s Marketplace explains, headline statistics don’t accurately reflect this magnitude. There are millions of people who have had their hours partially cut, are underemployed, or need to stay home to take care of kids. If you roll these numbers in, you’re looking at a whopping 30 million people who need more work income.<sup>18</sup>

Consumers are reevaluating all living expenses, including cable and satellite bills. This cost-sensitive climate has increased the rate at which people are cutting the cord. Data shows that many of them would have done it eventually — each year, anywhere from 2 to 4 million American adults quit satellite and cable, according to eMarketer. By 2022, 10 million more will do the same. Interestingly enough, in February of 2020, eMarketer projected 2020 to close with 80.5M households that Pay for TV. By the end of the year they adjusted their forecast to 77.6 — 2.9M less than just months before.<sup>19</sup>

And it’s not just cable. People are also cancelling subscription services and flocking to free streaming platforms.



**21% (1 IN 5) PEOPLE HAVE CANCELLED A STREAMING SERVICE BECAUSE OF COVID, ESPECIALLY AGES 18-34 (33%).<sup>20</sup>**



**STREAMING HOUSEHOLDS ARE SET TO OUTPACE CABLE TV HOUSEHOLDS IN 2023.<sup>19</sup>**



*Having a limited amount of money compared to what I had pre-pandemic, it is a blessing to have a service where I can still enjoy and watch some of my favorite movies.<sup>21</sup>*



Marcus, 35

<sup>18</sup> NPR Marketplace, Unemployment 2020, Oct 2020

<sup>19</sup> eMarketer, Feb 2020

<sup>20</sup> MRI-Simmons, Cord Evolution Study, Nov 2020

<sup>21</sup> Streamers of Tubi, User Experience Research, 2020

# NET NEW STREAMING AUDIENCE

## TUBI STREAMERS ARE UNREACHABLE THROUGH CABLE AND OTHER STREAMING PLATFORMS

The acceleration of cord cutting and intense subscription fatigue have consumers turning to AVOD, unlocking a net new audience for brands. As consumers continue flocking to streaming, Tubi reaches Streamers once captured with traditional TV. In fact, 80% of Tubi's audience is unreachable on the top 25 cable TV networks.<sup>22</sup>

Given that the vast majority of these audiences cannot be reached on linear TV, brands are connecting with them on Tubi as precisely illustrated in a recent case study with Winn-Dixie. Tubi partnered with the major grocery retailer's agency, USIM, to target audiences across the streaming platform.

In partnership with TVSquared, post-campaign analysis found that nearly 4 out of 5 of Tubi households reached were incremental — unique, additional audiences not reachable through Winn-Dixie's linear TV ads. this net new reach proved significantly efficient for the brand.



**79%** OF TUBI HOUSEHOLDS  
WERE INCREMENTAL TO WINN-  
DIXIE'S LINEAR INVESTMENTS<sup>23</sup>



*Driving incremental reach at a time when shopping behaviors are constantly changing is critical for proving marketing ROI.*

— Melissa Sierra  
SVP Group Strategy Director

USIM

## CASE STUDY:

tvSquared<sup>®</sup> | Winn-Dixie

This use case highlights what Winn-Dixie and so many other brands are beginning to understand: Streaming allows brands to reach audiences that are simply unreachable by cable alone.

What's more, Streamers themselves are so diverse that:



**68%** (2/3) OF TUBI'S  
STREAMERS CAN'T BE REACHED  
ON OTHER AVODS<sup>22</sup>

**78%**<sup>22</sup>  
OF TUBI  
STREAMERS  
aren't on



**71%**<sup>22</sup>  
OF TUBI  
STREAMERS  
aren't on



**56%**<sup>22</sup>  
OF TUBI  
STREAMERS  
aren't on



On the flip side, Tubi does have significant overlap with coveted services like Netflix. According to MRI-Simmons, more than 3 out of 5 Tubi Streamers also use Netflix — a place where video ads aren't available.

According to MRI-Simmons:

**62%**  
OF TUBI  
STREAMERS  
subscribe to



**47%**  
OF TUBI  
STREAMERS  
subscribe to



**17%**  
OF TUBI  
STREAMERS  
subscribe to



<sup>22</sup> MRI-Simmons, Cord Evolution Study, Nov 2020

<sup>23</sup> TV Squared Incremental Reach Study, 2020

\* Includes ad-free Hulu subscriptions only



SO...

# WHO ARE THE TUBI STREAMERS?



## YOUNG, DIVERSE AND ALL ACROSS AMERICA

Streamers on Tubi are proportionally and significantly younger than linear audiences. Of its 33 million monthly active users, nearly half are under 35.<sup>24</sup> The platform is also geographically representative, reaching streamers across all pockets of the US, including in harder-to-reach markets like the Midwest and South East corridors.

And Tubi's content is as diverse as its audience. At 30,000 titles and counting, it offers one of the largest content libraries among any streaming platform, with something for everyone: Tubi Kids provides programming for busy families, plus bilingual audiences have access to thousands of hours of Spanish-language content. Add in a destination library of Black Cinema favorites, top TV series like FOX's *The Masked Singer*, and a massive anime selection — and everything in between — Tubi is the epitome of personalization.

Significantly, most Streamers engage with

Tubi in the same way they would linear TV: watching on the big screen, with other people. Because of this, it makes sense that many of these price-conscious consumers see Tubi as a stand in for linear, not an addition to it. Nearly half of Tubi Streamers don't have cable, and those that do aren't watching most major cable channels.<sup>25</sup> Tubi Streamers simply aren't readily reachable through linear TV, making Tubi a unique and well-positioned platform to fill the gap.



OVER **84%** OF PEOPLE  
WATCH TUBI ON TV  
SCREENS, PRIMARILY FROM  
THEIR LIVING ROOMS<sup>24</sup>



**85%** OF TUBI HOUSEHOLDS  
HAVE 2+ VIEWERS<sup>25</sup>



**48%** OF TUBI AUDIENCES  
DON'T HAVE CABLE<sup>25</sup>

<sup>24</sup> Tubi Audience Data, 2020

<sup>25</sup> MRI-Simmons, Cord Evolution Study, Nov 2020

# STREAMERS

## A YOUNG, DIVERSE, NATIONALLY REPRESENTATIVE AUDIENCE

- | On average, 20+ years younger than linear TV audiences.
- | With a large representative Hispanic audience [Index 101]
- | And an even larger loyal African American audience [Index 167].

## PRICE CONSCIOUS



Liv, 47

*We were looking for a better alternative than paying \$200 a month for high priced TV. For the shows that we're getting with Tubi — good classic shows along with good newer shows. It's much better.*

## DRAWN TO A LARGE, DIVERSE LIBRARY OF CURATED CONTENT



- | **Tubi Kids:** programming for busy families
  - *Kung Fu Panda*



- | **Spanish-Language:** for large hispanic audience.
  - *Instructions Not Included*



- | **Black cinema favorites:**
  - Tyler Perry's *Why Did I Get Married?*



- | **Anime:** Huge Anime library for Young people
  - *Naruto*



- | **Nostalgia:** A walk down memory lane for older streamers
  - *Andy Griffith Show*



- | **News:** Live local news across 25 channels

And many other niche categories: sports, Westerns, horror, etc.



*Tubi's perspective categories actually hold true to what they are and I spend less time navigating and I actually find something I want to watch.*



Juan, 39

## NET NEW AUDIENCE

- | **Cable-free:** 48% of Tubi viewers don't have cable
- | **Incremental to linear TV:** 80% can't be reached via top 25 linear TV Networks

## MORE VALUABLE TO BRANDS

- | **TV viewing preference:** 4 out of 5 times watching on the TV screen



*I basically [only] use the television. I don't too much care about watching on smaller devices.*

— Annie, 37

- | **Co-viewing households:** 85% of Tubi

Streamers live in households of 2 or more people — with 2X+ the eyeballs per impression

## LET'S TAKE A

## DEEPER LOOK

AT WHAT MAKES UP THE FABRIC OF A

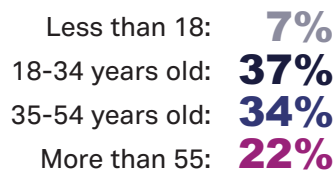
## TUBI STREAMER



#### GENDER:



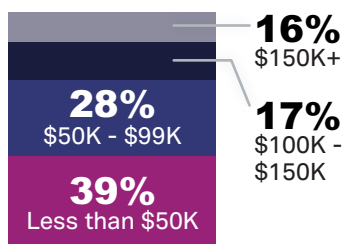
#### AGE:



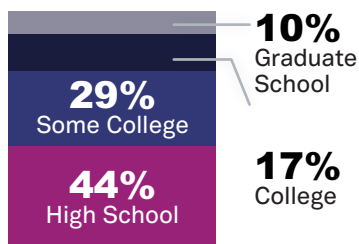
#### ETHNICITY:



#### INCOME:



#### EDUCATION:



# OVERALL:

- HUGE LIBRARY:** 30K Titles
- NATIONALLY REPRESENTATIVE AUDIENCE:** 33M Monthly Active Users
- FULL ATTENTION:** 2.5B Hours spent watching in 2020
- RAPID GROWTH:** 58% YoY growth in Streamers

## THE TUBI STREAMER:

A young, diverse, nationally representative TV audience — on average, 20+ years younger than linear TV. Streamers are cable-free, and the majority can't be reached via linear TV advertising or other AVOD platforms. A highly valuable audience to capture in 2021 with everything linear TV offers, and more.

- KIDS IN HOUSEHOLD:** 36% of households have kids
- TV STREAMERS:** 4 out of 5 times watching on a TV
- CO-VIEWING HOUSEHOLDS:** 85% of Tubi Streamers live in households of 2 or more people
- CABLE-FREE:** 48% of Tubi viewers don't have cable
- INCREMENTAL TO LINEAR:** 80% can't be reached via top 25 linear TV Networks
- INCREMENTAL TO AVODS:** 68% of Tubi Streamers can't be reached on other AVODs

#### TOP STREAMING DMA'S:



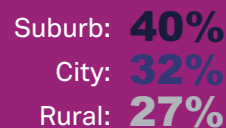
#### TOP 5 SERIES:

- Reality
- Documentary
- Drama
- Comedy
- Kids & Family

#### TOP 5 GENRES:

- Comedy
- Drama
- Action
- Horror
- Thriller

#### LIVING IN:



#### REGION:



#### POLITICAL LEANINGS:





# STREAMER SEGMENTS

| *Young and relevant demos*

| *More valuable, co-viewing  
experience*

| *Made with a diverse  
audience in mind*



**YOUNGER  
STREAMERS**



**OLDER  
STREAMERS**



**HISPANIC  
STREAMERS**



**FAMILIES  
THAT  
STREAM**



**AFRICAN  
AMERICAN  
STREAMERS**

# YOUNGER STREAMERS

**AGE:** 18-34 Years Old

**TV STREAMERS:** 4 out of 5 times watching on a TV

**COVIEWING:** 93% live with 2+ people

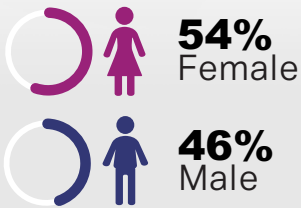
**11.9M** Monthly Active Users (36%)

**TOTAL VIEW TIME:** 72M hours per month

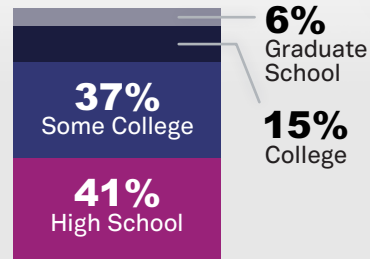
**HOUSEHOLDS WITH KIDS:** 54% of households have kids

**CABLE-FREE:** 57% of younger viewers don't have cable

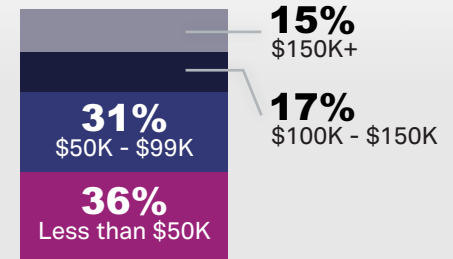
## GENDER:



## EDUCATION:



## INCOME:



## SERIES

### TOP GENRES:

- 1 Reality
- 2 Drama
- 3 Anime
- 4 Kids and Family
- 5 Documentary

### TOP TITLES:



### MORE LIKELY TO BUY:

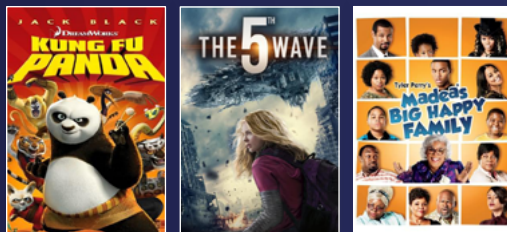
- | Adidas [Index 285]
- | Nike [Index 228]
- | Gamestop [Index 257]
- | Sonic [Index 231]
- | Pizza Hut [Index 153]

## MOVIES

### TOP GENRES:

- 1 Drama
- 2 Comedy
- 3 Action
- 4 Horror
- 5 Thriller

### TOP TITLES:



*Stuck at home. I don't own a T.V. or even a DVD player...Tubi saved my sanity. I was skeptical at first because I was unaware that it was free.*

Mark, 21

### INSIGHT:

Younger viewers are more price conscious — they are 9% less likely to have cable. They seek out content that's relevant to them, especially Comedies, Anime, Kids and Family.

# OLDER STREAMERS

**AGE:** 34-54 Years Old

**TV STREAMERS:** 4 out of 5 times watching on a TV

**COVIEWING:** 87% live with 2+ people

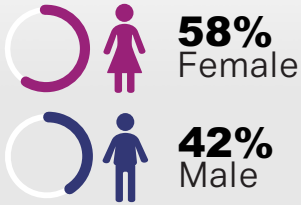
**11M** Monthly Active Users (34%)

**TOTAL VIEW TIME:** 68M hours per month

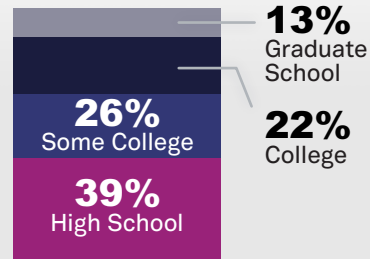
**HOUSEHOLDS WITH KIDS:** 46% of households have kids

**CABLE-FREE:** 49% of older streamers don't have cable

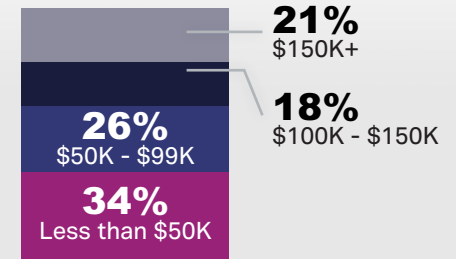
## GENDER:



## EDUCATION:



## INCOME:



## SERIES

### TOP GENRES:

- 1 Reality
- 2 Drama
- 3 Documentary
- 4 Comedy
- 5 Mystery

### TOP TITLES:



### MORE LIKELY TO BUY:

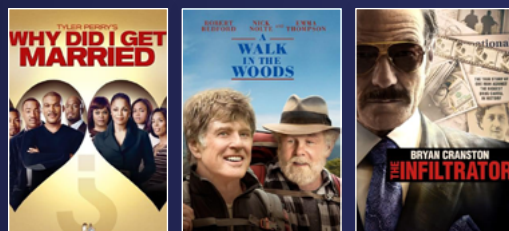
- | Gap [Index 297]
- | Wrangler [Index 210]
- | New Balance [Index 192]
- | Applebee's [Index 196]
- | Burger King [Index 147]

## MOVIES

### TOP GENRES:

- 1 Drama
- 2 Action
- 3 Horror
- 4 Comedy
- 5 Thriller

### TOP TITLES:



*...all these great shows and I'll sit there and actually get more excited about the the content that I'm finding than sitting down to watch.*

Anthony, 39

### INSIGHT:

Older streamers crave the nostalgia of their past as well as a variety of content. In many ways, a streaming service to them is a record store of hours of enjoyable perusing.



# FAMILIES THAT STREAM

**YOUNG:** 31 Years Old

**TV STREAMERS:** 4 out of 5 times watching on a TV

**COVIEWING:** 87% live with 2+ people

**11.8M** Monthly Active Users (36%)

**TOTAL VIEW TIME:** 72M hours per month

**CABLE-FREE:** 48% of families with kids don't have cable

**TUBI TOP DESTINATION:** Tubi Kids is a kid-friendly streaming experience. Especially relevant with virtual learning.

## GENDER:



**67%**  
Female

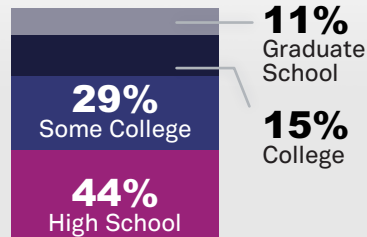


**33%**  
Male

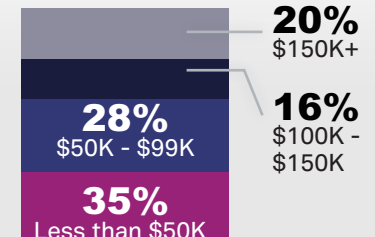
## KIDS AGES:

Less than 2: **19%**  
2-5 years old: **34%**  
6-9 years old: **34%**  
10-13 years old: **31%**  
14-17 years old: **35%**

## EDUCATION:



## INCOME:



## SERIES

### TOP GENRES:

- 1 Kids and Family
- 2 Animation
- 3 Anime
- 4 Comedy
- 5 Drama

### TOP TITLES:



### MORE LIKELY TO BUY:

- | Children's Place [Index 475]
- | Wingstop [Index 474]
- | Michael Kors [Index 387]
- | Krispy Kreme [Index 219]
- | Dove Chocolate [Index 212]

## MOVIES

### TOP GENRES:

- 1 Kids and Family
- 2 Animation
- 3 Comedy
- 4 Holiday
- 5 Drama

### TOP TITLES:



*My kids get into my nostalgia and they tend to like a lot of the same old stuff...it's just exciting to say oh here's something we can all enjoy.*

Anthony, 39

### INSIGHT:

Households with kids are more likely to co-view. Many of them seek out content that takes them down memory lane — especially when sharing it with their children.





# HISPANIC STREAMERS

**YOUNG:** 35 Years Old

**TV STREAMERS:** 4 out of 5 times watching on a TV

**COVIEWING:** 93% live with 2+ people

**5.6M** Monthly Active Users (17%)

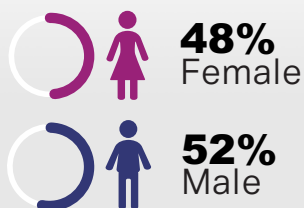
**TOTAL VIEW TIME:** 34M hours per month

**HOUSEHOLDS WITH KIDS:** 42% of households have kids

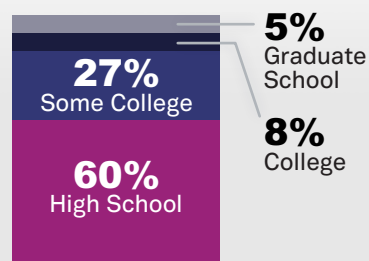
**CABLE-FREE:** 46% of Hispanic viewers don't have cable

**TUBI TOP DESTINATION:** Content for bilingual streamers

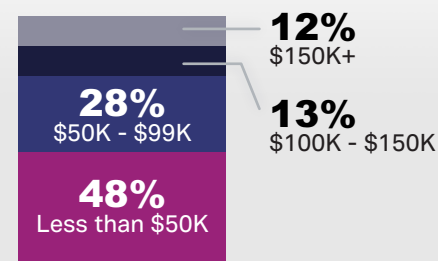
## GENDER:



## EDUCATION:



## INCOME:



## SERIES

### TOP GENRES:

- 1 Drama
- 2 Documentary
- 3 Kids and Family
- 4 Anime
- 5 Comedy

### TOP TITLES:



## MORE LIKELY TO BUY:

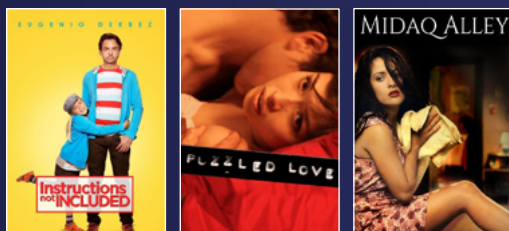
- | Telemundo [Index 579]
- | Skechers [Index 232]
- | Old Navy [Index 213]
- | Starbucks [Index 196]
- | Wendy's [Index 166]

## MOVIES

### TOP GENRES:

- 1 Action
- 2 Drama
- 3 Comedy
- 4 Horror
- 5 Thriller

### TOP TITLES:



*My daughter was [practicing] her Spanish, I was like go find something on [Tubi] — then she was watching away and having a good time.*

Vincent, 41

## INSIGHT:

Tubi caters to a large nationally representative audience with a broad selection of Spanish language content, which reaches an even broader audience.

# AFRICAN AMERICAN STREAMERS



**YOUNG:** 37 Years Old

**TV STREAMERS:** 4 out of 5 times watching on a TV

**COVIEWING:** 86% live with 2+ people

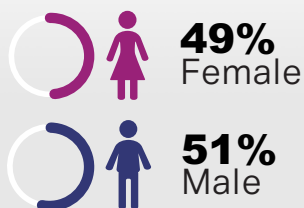
**6.6M** Monthly Active Users (20%)

**TOTAL VIEW TIME:** 40M hours per month

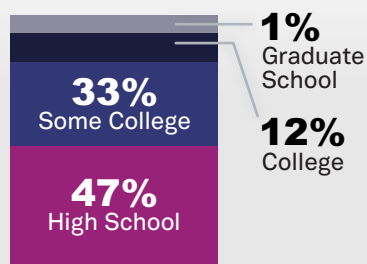
**HOUSEHOLDS WITH KIDS:** 42% of households have kids

**CABLE-FREE:** 48% of African American viewers don't have cable

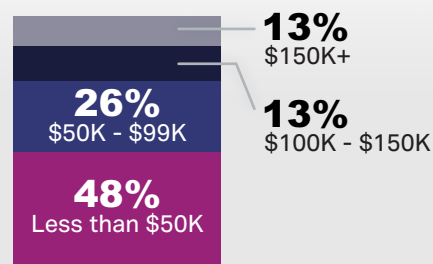
## GENDER:



## EDUCATION:



## INCOME:

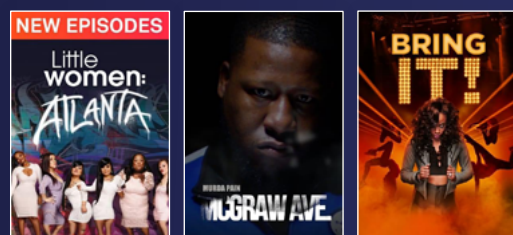


## SERIES

### TOP GENRES:

- 1 Reality
- 2 Comedy
- 3 Kids & Family
- 4 Drama
- 5 Documentary

### TOP TITLES:



### MORE LIKELY TO BUY:

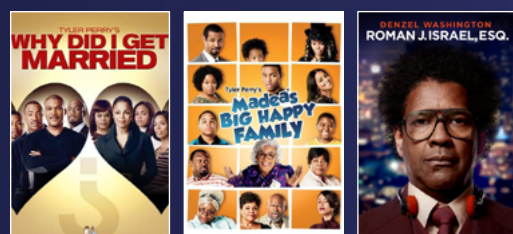
- | Metro by T-Mobile [Index 377]
- | Nike [Index 229]
- | Levi's [Index 186]
- | Popeyes [Index 214]
- | Chick-fil-A [Index 156]

## MOVIES

### TOP GENRES:

- 1 Action
- 2 Drama
- 3 Horror
- 4 Comedy
- 5 Thriller

### TOP TITLES:



*It gives you more movies than Netflix has... You just don't get those movies that you grew up with anywhere else. That's what keeps me coming back.*

Tania, 39

### INSIGHT:

Tubi over-indexes heavily among the African American audience, appealing to their varied taste, including action, horror, thrillers and Black cinema. (167 Index)

The Black Cinema text is the Tubi Top

# BEST IN CLASS

AD EXPERIENCE THAT LEADS TO BRAND IMPACT

## STREAMING INCREASES ROI, OFFLINE CONVERSION, AND INCREMENTAL REACH TO YOUNG AND DIVERSE AUDIENCES

Beyond just reaching a desirable incremental audience, the Tubi Ad Experience is key to creating a positive brand experience. It improves brand perception, drives store visits, and increases overall ROI.

## STREAMING REACHES MORE VIEWERS BY REDUCING AD FREQUENCY

For a national insurance brand:



TUBI REDUCED OVER-FREQUENCY BY 366%

### CASE STUDY:



In response to industry-wide efforts to manage ad frequency and duplication, Tubi unveiled its Ad Frequency Management (AFM) tool in 2020. Leveraging this technology, Tubi worked on a campaign with a national insurance brand. As a result, it achieved incremental reach by decreasing ad frequency and ad fatigue, making it a win-win-win for the platform, advertiser, and Streamers.

In the past, this national brand had invested in streaming ads through several channels, including direct to publisher, programmatic private, and open marketplaces. The company had seen the success in reach and impact that these campaigns brought, but still had concerns over ad frequency.

The brand partnered with Tubi on a direct ad buy, in addition to purchasing through ad networks and the open exchange. The result? Using AFM, Tubi was able to reduce over-frequency by 366%.

It reduced ad fatigue while increasing incremental reach, ultimately accessing more diverse audiences and improving overall ROI.



**28M** IMPRESSIONS  
BLOCKED ACROSS 10  
AUDIENCE AGGREGATORS.



INCREASED DAILY  
INCREMENTAL REACH BY **97k**.



**\$1M** INVESTMENT IN 2021  
COULD INCREASE REACH BY 3.2M  
STREAMERS, IMPROVING ROI.

# BEST IN CLASS

AD EXPERIENCE THAT LEADS TO BRAND IMPACT

## Tubi Significantly Increased

THE MASKED SINGER  
VIEWERSHIP AMONG  
18 TO 34 YEAR OLDS

Streaming reaches  
a younger, more  
diverse audience

### CASE STUDY:

## tubi + FOX

The Masked Singer

FOX, which acquired Tubi in March 2020, broadened its reach for their massively appealing hit reality competition, *The Masked Singer* (TMS) by bringing it to new streaming audiences on Tubi.

The collaboration was synergistic: together, *TMS* was able to reach an audience across the spectrum. FOX was able to complement its robust older viewership with a younger streaming audience, getting the best of both worlds.

It turns out the platform does dictate viewership — not just the content itself.



ON AVERAGE, THE TUBI AUDIENCE  
WAS 16 YEARS YOUNGER THAN THE  
AUDIENCE PROFILE VIA LINEAR TV.<sup>26</sup>





# BEST IN CLASS

AD EXPERIENCE THAT LEADS TO BRAND IMPACT

## Tubi's Campaign

**DROVE A 41%  
LIFT IN AD  
AWARENESS**

Streaming increases  
brand lift

### CASE STUDY:

tubi +   
National CPG Brand

In an ever-competitive snacking landscape, an iconic American consumer packaged goods (CPG) brand wanted to ensure it was staying top of mind.

As validated by third party measurement, Tubi's campaign demonstrated improved brand perception among both lapsed and competitive buyers.



**TUBI'S CAMPAIGN ACHIEVED A 41% LIFT IN AD AWARENESS, MORE THAN TWICE THE KANTAR MILLWARD BROWN CPG SNACK VIDEO BENCHMARK.**<sup>27</sup>

It's important to note that a viewer's purchase history determines how effective an ad can be. In this case, Tubi's campaign helped infrequent buyers dramatically increase brand awareness, ad recall, brand favorability, and purchase consideration, ultimately, taking market share from category competitors.

Among lapsed buyers — people who buy once a month or less:



**CAMPAIGN DROVE A 22% LIFT IN BRAND AWARENESS, 104% LIFT IN AD AWARENESS, A 49% LIFT IN BRAND FAVORABILITY, AND A 47% LIFT IN PURCHASE CONSIDERATION.**

# BEST IN CLASS

AD EXPERIENCE THAT LEADS TO BRAND IMPACT

## Tubi's Campaign

**DROVE A 16%  
UPLIFT IN  
STORE VISITS**

Streaming increases  
offline conversion

### CASE STUDY:



Well Known Fast Food Brand

A major quick service restaurant (QSR) brand decided to partner with Tubi, in hopes of increasing reach and offline conversion — specifically looking to drive consumers to their drive-through.



**ACROSS THE COUNTRY AT LARGE, THE CAMPAIGN RESULTED IN A 16% UPLIFT IN STORE VISITS, WITH A REPORTED 90% CONFIDENCE LEVEL.<sup>28</sup>**

Across the country, offline conversion spiked. The results were especially pronounced in the brand's top five regional markets: New York, Chicago, Atlanta, Philadelphia, and Miami.



**IN KEY MARKETS, CAMPAIGN DROVE A 62% UPLIFT IN STORE VISITS.**

# CONCLUSION

## STREAMERS ARE TABLE STAKES FOR MEDIA INVESTMENTS IN 2021 AND BEYOND.

### **Streaming is incremental — and indispensable.**

Streaming provides a pathway to access a young, diverse net new audience not accessible through linear.

In 2021, it's essential that streaming become a key consideration — nay, **a necessary** addition to any linear TV strategy, providing access to a fundamentally different and incremental audience: Streamers.

This incremental reach, along with a best in class ad tech experience — leveraging tools like Tubi's Advanced Frequency Management — significantly improves ROI by decreasing ad fatigue and improving the viewing experience. What's not to love?

## RECAP AND RECOMMENDATIONS FOR 2021

Streamers are incremental to any linear TV Strategy. The streaming audience is scalable, diverse, and unique and drawn to a huge, free library of premium content. Coupled with a best in class ad tech experience for both viewers and brands — the result is unmatched — a significant improvement in ROI.

Simply put, a linear-only approach is no longer sustainable. Streaming should be an always-on tactic that complements linear TV in 2021.

**SO...**

**START ASKING YOURSELF**

## HOW ARE YOU REACHING STREAMERS TODAY?



## ABOUT TUBI

Tubi is FOX's breakthrough ad-supported streaming platform, offering brands flexibility and ease to reach massive incremental audiences everywhere. It's where best-in-class entertainment meets best-in-class streaming, with more than 30,000 titles and 75,000+ hours of shows, movies, live news, and breakthrough entertainment across the FOX portfolio and beyond. Our mission? Freeing the world's entertainment to super-serve audiences and brands everywhere. Together, FOX and Tubi offer unprecedented access to breakthrough audiences, content, and experiences with the power to transform the industry.

Tubi is the only truly free streaming service that delivers unparalleled, no-strings-attached access to an entire universe of entertainment with an experience worth paying for. We strive to create the shortest distance to the most entertainment with an easy-to-use, hyper-personal, data-driven experience that gets better with every binge. And Tubi is for everyone—every genre fan, movie buff, casual escapist, and adventurous streamer. We're on a mission to democratize the world's entertainment, because we believe everyone deserves unprecedented access to the stuff they love.

## ABOUT THE DATA

To explore the streaming audience and TV viewing behavior, Tubi analyzed a number of first-party and third-party data sources. Including the following:

- | A backstage pass to **Tubi's audience data**.
- | A first look at the **Streamers of Tubi**, qualitative user experience research.
- | Partnerships with Advertiser Perception and B2B international quantitative custom research studies.

### AD MEASUREMENT PARTNERS:

 **cuebiq**   
**KANTAR MILLWARD BROWN**

### TRUSTED INSIGHTS PARTNERS:

**MRI** | **SIMMONS** **YouGov**  
**nielsen** **eMarketer**  
.....





**tubi + FOX**  
BREAKING THROUGH TOGETHER