

**2023**

# **AUDIENCE** **INSIGHTS**

**For Brands**

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# Streaming

## EXECUTIVE SUMMARY

It seems like such a short time ago that Ad-Supported Video on Demand (AVOD) became a part of the TV landscape, and 2022 has shown us that the future of television is rapidly changing with consumer demand for how and what they want to watch. Every year, more consumers discover options outside traditional pay TV and adopt ad-supported streaming.



*As millions of households continue to cut the cord, for the first time in decades, less than half of US households will have traditional pay TV in 2023.<sup>1</sup>*

### Where are they going?

Many are just shifting how they get linear and cable TV content, with tens of millions adopting streaming pay TV alternatives (like Hulu Live, YouTube TV, and Sling).

At the same time, millions more flock to advertising-supported video on-demand (AVOD), which offers vast sums of content on easy terms: convenient and (mostly) free. AVOD platforms offer free entertainment supported by a few ads per hour, and in Tubi's case, are growing faster than their competitive set and several subscription video on-demand (SVOD) services.<sup>2</sup>

### A new trend in the streaming market is SVOD platforms adding ad-supported plans.

To reduce monthly subscription fees, streamers agree to see advertisements—yet another endorsement of ads in entertainment.

The big screen is where to stream—Connected TV (CTV) is now the primary way audiences consume streaming content.<sup>3</sup>

Whether directly through a smart TV or a “dongle” (like a Roku or Fire Stick), there were 226 million CTV viewers in 2022, with an expected increase to 242 million by 2026.<sup>4</sup>



Led by the rapid adoption of CTV, advertisers are shifting investments to keep up. CTV ad placements are expected to more than double from 2022 to 2026.<sup>5</sup> So what is shifting audience affinity towards ad-supported streaming? This comprehensive report answers that and more.

<sup>1,4</sup> eMarketer, Sept & Oct 2022

<sup>2</sup> MRI - Nov 2022 Cord Evolution - (Comp set: Roku Channel, Pluto, FreeVee)

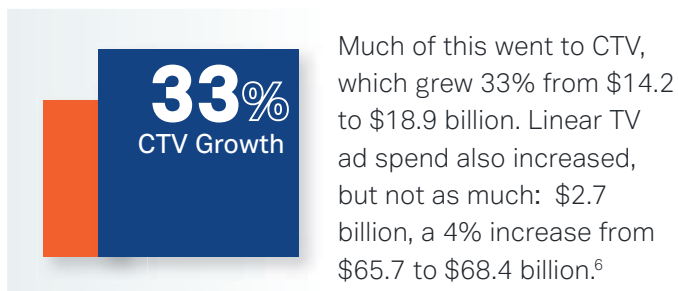
<sup>3</sup> Comscore, State of Streaming

<sup>5</sup> eMarketer, Mar 2022



# YEAR OVER YEAR CHANGES

**Follow the money: From 2021 to 2022, ad spend rose \$7.4 billion across linear and CTV.**



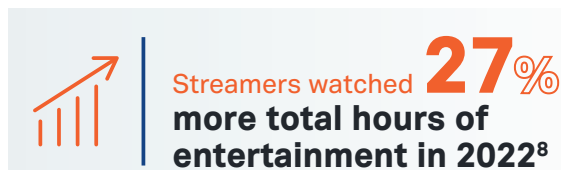
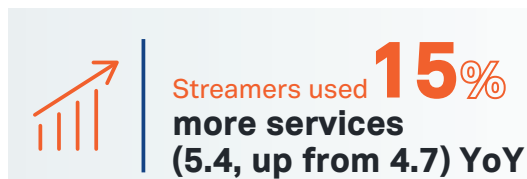
The money is following the eyeballs. The trend in ad spend aligns with the growth of streaming and new ways consumers choose to watch television. Last year, pay TV subscription dropped 5.4%, losing 3 million accounts.<sup>7</sup> Meanwhile, SVOD and AVOD service adoption continues to grow at double digit rates.

Not only did streaming reach more screens in 2022, streamers are more engaged with streaming than ever before.



Hardware helped lead the way on the biggest screens in the house—an additional 8 million smart TVs and 2 million streaming box/sticks delivered CTV content last year, and even more streaming hardware is coming to market each year.<sup>9</sup> As consumers upgrade to new TVs, or with streaming devices, TV screens continue to be the most popular screen where audiences stream.

Despite viewership growth, many SVOD providers including Netflix, Hulu, Amazon Prime, and Disney+ raised rates in 2022, in large part to offset exorbitant investments in Original content that appeal to a subset of consumers. This helps explain why consumer spending on subscriptions is up 16%, and why SVOD churn rate nearly doubled from January 2019 to August 2022.<sup>10</sup>



**Free AVOD is here for cord cutters and pay streamers looking to complement or reduce their commitments to SVOD**

In 2022 alone, Tubi expanded its content library 11% and remains completely free. According to MRI, Tubi's audience grew over 30% YoY, with substantial gains in all major demos.

<sup>6</sup> eMarketer, March & June 2022

<sup>7,10</sup> Variety VIP+ Dare to Stream

<sup>8,9</sup> Comscore, State of Streaming

<sup>11</sup> MRI - Nov 2022 Cord Evolution, self-reported survey data

# WHERE ARE THINGS HEADED?

## To the digital big screen. More minutes are shifting to cordless TV viewing.

And CTV ad spend, SVOD churn, and linear TV subscription trends all point towards AVOD's growth in the future of streaming.

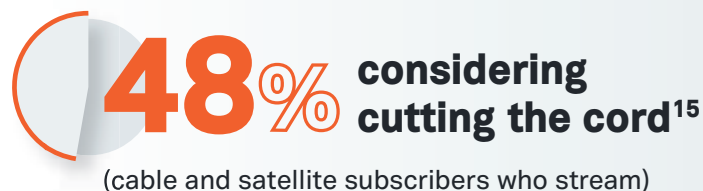
Double-digit growth in CTV advertising is projected annually through 2026 where total spend is expected to claim over 40% of combined TV ad placements.<sup>12</sup>

There's more competition in the domestic SVOD market than ever, and platforms may be running out of room for growth. As economic pressures mount, costs are passed on to consumers in the form of higher subscription fees and advertisements. Combine that with SVODS slowing original content development, and streamers may find value elsewhere.<sup>13</sup>

It's estimated:



Access to streaming helps audiences re-evaluate their service contracts:



For traditional “pay TV” (cable, satellite, etc), 2023 is the tipping point. Non-pay TV is projected to outpace pay TV by 4.6 million viewers in 2023, and 19.8 million in 2024. In these projections, CTV will grow by 15% while traditional pay TV will drop 10%.<sup>16</sup> The losses are more for cable companies than networks, since more than a third of these “pay TV losses” are switching to vMVPDs like Hulu Live and YouTube TV.

The result for buyers is that more of their audience can be found online, on CTVs and other OTT screens, and that new ways of communicating with them are becoming the norm.



<sup>12</sup> eMarketer, Pitching CTV investment in 5 charts

<sup>13</sup> Variety Intelligence Platform, Dare to Stream

<sup>14</sup> eMarketer - Sept 2022

<sup>15</sup> Magid, Q3 2022 self-reported, n=2,000 & stream AVOD & SVOD

<sup>16</sup> eMarketer, Sept & Oct 2022

# WELCOME TO THE STREAM

**It was demonstrated in 2022 that not only is AVOD here to stay, it's here to lead the way.**

For years, ad-supported streaming was secondary in the television market. Today, many TV and SVOD services are embracing the AVOD model with their own ad-supported options.

Why? Because the viewers are there. Also, costs of streaming entertainment are rising. Inflation has increased costs of operation and content production, influencing platforms to embrace new revenue streams and cost-conscious approaches.<sup>17</sup>

Similarly, consumers want to keep their own costs in check during uncertain economic times.

*Nearly 1 in 3 streamers plan to cut back spending on subscription services, and 48% of linear TV subscribers who stream are considering dropping their cable or satellite services.<sup>18</sup>*

## **Financial pressures aren't reducing audiences' interest in entertainment.**

Less than 1 in 3 US streamers want to decrease the amount of streaming accounts they pay for in 2023. However, nearly 1 in 2 streamers who cut back on paid services say it's because of budgetary constraints.<sup>19</sup> The high expense of cable and satellite TV is also the leading reason for viewers to unsubscribe.<sup>20</sup>

**1 IN 3**

US streamers want **fewer paid streaming accounts**

**1 IN 2**

Cut-backs on paid services are **due to budgetary constraints**

## **In contrast to increased living expenses, AVOD services like Tubi remain free and offer an alternative to rising SVOD costs, resulting in an ideal atmosphere for AVOD adoption.**

AVOD services are growing in audience and content libraries that offer Hollywood movies, original content, and live television.

One benefit to media buyers is that AVOD streamers are receptive to advertisements.<sup>21</sup> Coupled with non-pay TV audiences surpassing pay TV viewership in 2023 and CTV ad buys growing rapidly,<sup>22</sup> it's clear that momentum favors AVOD to lead the streaming space moving forward.

<sup>17</sup> Variety Intelligence Platform, Dare to Stream p15

<sup>18,20</sup> Magid, Q3 2022 self-reported, n=2,000 & stream AVOD & SVOD

<sup>19,21</sup> Variety Intelligence Platform, Dare to Stream

<sup>22</sup> eMarketer - Advanced TV 2022



## Key Takeaways

### 01 | AVOD LEADS IN CONSUMER ADOPTION

Non-pay TV is expected to surpass pay TV viewership in 2023, and AVOD leads the growth in streaming.<sup>23</sup> Three in four consumers agree that AVODs are a practical alternative to cable and satellite TV,<sup>24</sup> and 28% of US consumers plan to cut back spending on subscription streaming services.<sup>25</sup>

### 02 | AVOD: THE RIGHT CONTENT AT THE RIGHT PRICE

AVOD's light ad load, generous content offering, and free "price" drive adoption. While we can't speak for all AVOD, less than one in five streamers are unsatisfied with the length of ad breaks on Tubi.<sup>26</sup> Convenience is important too—there's been a rise of VOD for sports and event replay viewership.

### 03 | WHAT STREAMERS WANT (WITH BENEFITS)

**When choosing a service:**

- 85% prioritize variety and high-quality content.
- 80% want fresh content that's easy to find.
  - The bar is higher for free:
    - 34% value ease of use in subscription streaming.
    - 54% for free streaming services.<sup>27</sup>
- 81% choose services based on price.<sup>28</sup> 55% want to share logins, and 45% want the option to stream without an account.<sup>29</sup>

### 04 | WHAT DRIVES SATISFACTION

We've identified five types of streamers. From "recommendation seekers" to "genre-focused browsers," they all share the same three drivers of satisfaction:

**"A good mix" of content | Recommendations | Seamless navigation<sup>30</sup>**

### 05 | WHAT CTV AD GROWTH IS FUELED BY

CTV advertising continues to grow, and funding isn't just coming from linear budgets. This year, more digital video, social media, OOH, and traditional media dollars shifted to CTV.<sup>31</sup> With uncertainty in digital markets, advertisers look for the brand safety of TV combined with the agility of digital, which the right CTV partners can deliver.

<sup>23</sup> eMarketer - Advanced TV 2022, and Sept 2022

<sup>24</sup> Magid, Q3 2022 self-reported, n=2,000 & stream AVOD & SVOD

<sup>25,28</sup> Variety Intelligence Platform, Dare to Stream

<sup>26</sup> Marketcast, Q3 2022, self-reported n=4,501

<sup>27,29</sup> Qualtrics, Q1 2022, self-reported n=3,137 and stream 1+ hr a week

<sup>30</sup> B2B Segmentation Study, 2022, self-reported n=2,000

<sup>31</sup> Ad Perceptions, 1H 22



# Tubi Audience Insights

## AT A GLANCE

**50,000+**  
TITLES

**73%**  
CABLE-FREE

**39**  
MEDIAN AGE<sup>32</sup>

### The Tubi audience is increasingly diverse and young

The Tubi audience has seen growth across age demos to be more nationally representative. However, according to MRI, Tubi audiences still skew younger and more diverse, seeing 50% or more YoY growth in African American, LGBT audiences, and the A18-34 age bracket.<sup>33</sup>

#### MORE YOUTH AND DIVERSITY

YOY GROWTH MORE THAN **50%**  
AFRICAN AMERICAN, LGBT,  
AND A18-34 AUDIENCES

### Tubi made significant gains with key audiences

According to MRI, audience growth exceeded 25% in each major level of household income and the Hispanic demo. 50% growth was seen across African Americans and the LGBT audience.<sup>34</sup>

#### KEY AUDIENCES

**25%** MORE  
USERS  
IN EACH INCOME LEVEL

### Tubi viewership continues to soar YoY

According to MRI, Tubi content reached 33% more users YoY, which was 4 times the growth rate of many other AVOD services.<sup>35</sup>

#### TUBI AUDIENCE GROWTH

MORE THAN **30%** YOY  
NEARLY 4X AVOD RATE

### As Tubi's audience grows, its younger demographic remains strong.

More than 1 in 3 (36%) Tubi streamers are between the ages of 18 and 34.<sup>36</sup>

#### TUBI STREAMERS ARE YOUNG

MORE THAN **1 IN 3**  
STREAMERS ARE A18-34

### The majority of Tubi streamers say the service they receive is worth watching ads for<sup>37</sup>

Tubi streamers are 10% more likely than the national average to state that they "like to look at advertising"<sup>38</sup> and that "advertising helps me choose what I buy."<sup>39</sup>

#### TUBI STREAMERS ARE

**10%** MORE  
LIKELY  
TO STATE THEY  
"LIKE TO LOOK AT ADS"

### Tubi users aren't found on competing AVOD platforms

Only 43% of Tubi users access Peacock, 37% stream Roku, and 44% are on Pluto.<sup>40</sup> This combination makes Tubi's diverse and unique audience an attractive option for advertisers.

#### THE COMPETITION

**25%** OF TUBI  
STREAMERS  
CAN'T BE REACHED ON  
OTHER FREE AVODS

<sup>32,36</sup> Tubi Internal, Q4 2022

<sup>33,34,35,38</sup> MRI - Nov 2022 Cord Evolution, self-reported survey data

<sup>37</sup> Marketcast, Q3 2022, self-reported n=4,501

<sup>39</sup> YouGov Profiles, 10/9/22

<sup>40</sup> MRI - Nov 2022 Cord Evolution, self-reported survey data; Peacock w/ Ads



# AVOD

## and its Winning Components

AVOD has historically been second to SVOD in the streaming conversation. Recently, refinement of AVOD and FAST services, subscription fatigue, and economic factors have all brought free television services to the forefront.



*AVOD is the fastest growing medium for long form TV content consumption.<sup>41</sup>*

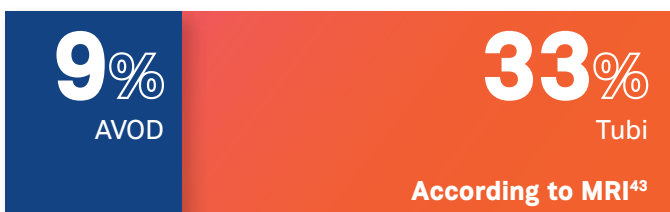
It affords its users flexibility as to when and where television is viewed. With no upfront or monthly costs, the barriers that face linear or SVOD do not apply. As audiences choose ad-supported video content, they expect their streaming service to show advertisements.

Regardless of the economy, limiting expenses is generally considered a good idea. As television viewers consider their finances, three out of four streamers agree that AVODs are a practical alternative to cable and satellite TV.<sup>42</sup>

Even SVOD stalwarts are embracing AVOD. With slowed subscription growth and rising production costs, companies like Netflix and Disney+ rolled out ad-supported subscription tiers to drive additional revenue.

The allure of saving money, in addition to larger catalogs of licensed, live, and original content, contributed to...

### YoY Growth, 2021-2022



Further, while SVOD growth will remain relatively flat, (+2%), AVOD streamers are expected to increase another 9% in 2023 and 24% between 2022 and 2026 overall.<sup>44</sup>

### AVOD Streamer Growth



As the lines between AVOD and SVOD continue to blur with subscription services displaying ads in addition to charging fees, the question begging to be asked is, "what price will streamers support most?"

**The answer, we believe, is free.**

<sup>41,43</sup> MRI - Nov 2022 Cord Evolution, self-reported survey data<sup>46</sup> eMarketer, Sept & Oct 2022

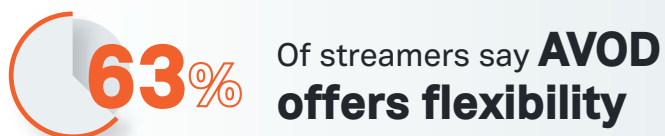
<sup>42</sup> Magid, Q3 2022 self-reported, n=2,000 & stream AVOD & SVOD

<sup>44</sup> eMarketer, Sept & Oct 2022

# FLEXIBILITY & VALUE

Compared to paying for cable or SVOD services, free AVOD presents intriguing value to audiences. With massive libraries, no long-term contracts or monthly fees, AVOD provides a robust complement to home entertainment.

**AVOD offers more than just financial value, its flexibility is highly appealing.**



allowing them to view programming on their schedules from an assortment of devices.<sup>45</sup> There's no need to watch television in real time as Tubi users can start, stop, and resume their content as they please.

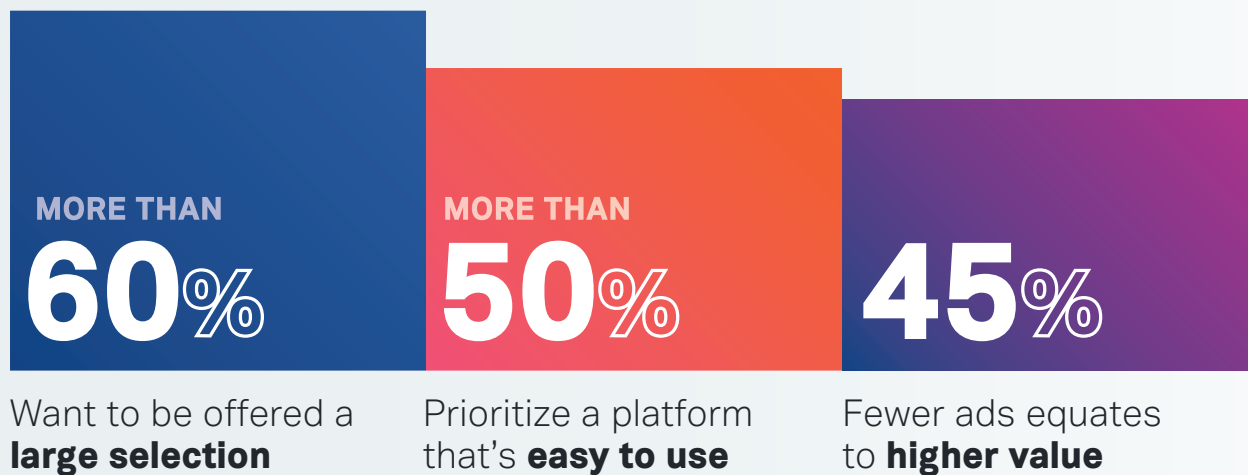
Also, there's no limit to how many AVOD accounts a household creates, or even shares, making for simple streaming with lots of options.

The true value of what AVOD offers lies in the strength of its content and how straightforward it is to use. Audiences want a variety of content that is easy to find.

Over 60% of streamers rate a large selection of offerings as the critical component of an AVOD's value. More than 50% of streamers prioritize platforms that are easy to use. Comparatively, just 45% of audiences say that fewer ads equates to higher value of a streaming service.<sup>46</sup>

Audiences value flexible, customizable viewing experiences and consider a reasonable number of ads a fair bargain to ensure their entertainment stays free. More on that later.

## WHAT'S IMPORTANT TO STREAMERS IN A FREE STREAMING SERVICE:



<sup>45</sup> Magid, Q3 2022 self-reported, n=2,000 & stream AVOD & SVOD

<sup>46</sup> Qualtrics, Q1 2022

# VIDEO ON-DEMAND (VOD)

**Domestic markets stream hundreds of billions of hours of programming annually,<sup>47</sup> which is why it's no surprise that there's more content available across the streaming video on-demand (VOD) market than ever before. As audiences continue to shift from linear to streaming television, seismic shifts are happening in the VOD landscape as well.**

## One area of interest: Live Sports

After the game, VOD brings an extra element to sports content, providing clips, highlights, and commentary. We saw this play out recently with the World Cup. Given the choice of short highlights, long highlights, and full game replays, 5x more streamers chose full game replays, and nearly twice as many watched extended highlights than short (90 second) highlights.

This demonstrates the staying power of live content, even after the final buzzer or whistle.

### WHILE LIVE IS THE PREFERRED WAY TO WATCH SPORTS,



**More than 1 IN 4**  
streamers frequently  
watch full game replays



**MORE THAN 1 IN 3**  
watch recap videos/  
highlights

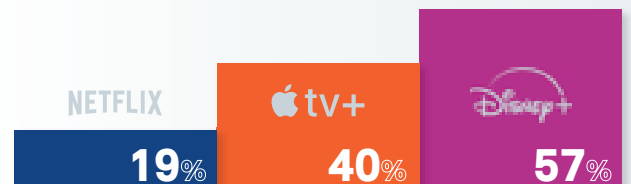


**MORE THAN 40%**  
think ideal sports recap  
length is 10+ minutes<sup>48</sup>

## Inflation target: Originals

Originals helped grow SVOD and AVOD in 2022. SVODs have invested heavily in original content, which comes at a cost. To maintain profits, several providers are embracing ads, raising rates, limiting new content spending, and even cracking down on password sharing.

### STREAMING SERVICES PRICE INCREASE OVER TIME (2019-2022)



Source: Statista, 2022

Many SVOD users feel like they pay too much for streaming, and



As the costs of SVOD increase, and more streamers see ads they didn't bargain for, like the 72% of Netflix subscribers who claim they aren't interested in ad-supported SVOD,<sup>50</sup> it's possible that the popularity of AVOD grows even faster than expected.

<sup>47,49</sup> Variety Intelligence Platform, Dare to Stream

<sup>48</sup> Magid, Q3 2022 self-reported, n=2,000 & stream AVOD & SVOD

<sup>50</sup> MediaPost, August 2022

# AD EXPERIENCE & PREFERENCE

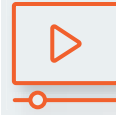
An advantage of AVOD for both consumers and advertisers is that there's no confusion about whether the content is ad supported. This produces an environment of willingness and anticipation where audiences intentionally share their attention to be entertained.

As it turns out, the idea that consumers will not tolerate ads on streaming services is simply not true. The millions of new AVOD users prove it, and less than 1 in 5 streamers are unsatisfied with the length of ad breaks on the Tubi platform.<sup>51</sup>

However, streamers still prefer lighter ad loads.



of AVOD streamers like streaming services with **fewer ads**<sup>52</sup>



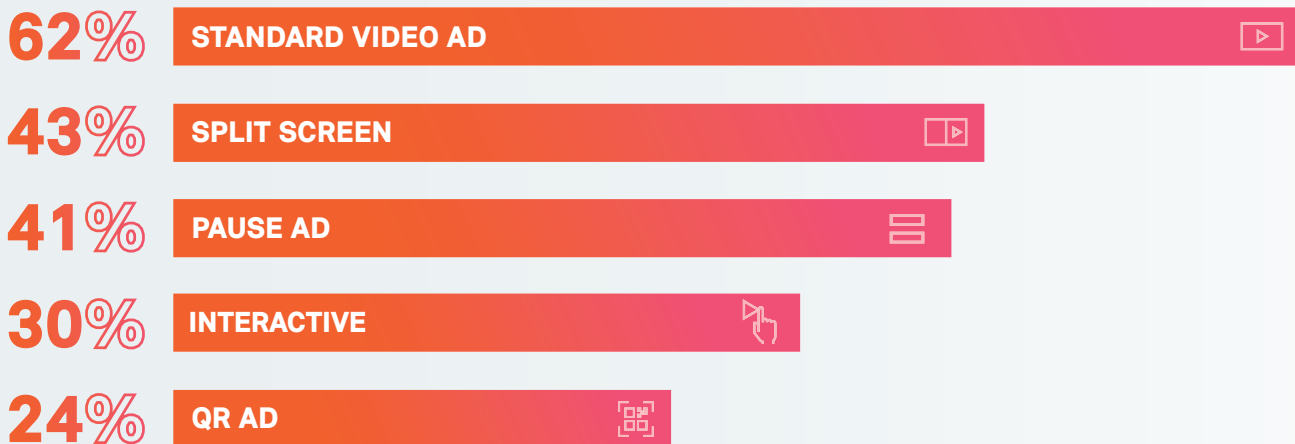
## Streamers prefer standard video ads

While ads are expected, the number and frequency of ad breaks is key: streamers want as few interruptions during their content as possible.<sup>53</sup>

Compared to linear TV's average of 13 to 17 minutes of advertisement per hour of display, successful AVODs keep streamers engaged with light ad loads, 6 or fewer minutes per hour, an amount that less than 17% of Tubi users are dissatisfied with.<sup>54</sup>

With so many new ad offerings in CTV, which types of ads do streamers want? Standard video ads are preferred by streamers over other formats such as split screen, interactive, or QR code ads.<sup>55</sup> Tubi ads align with streamer preferences by serving relevant messaging in a familiar format.

## PREFERRED AD FORMATS, AVOD & SVOD STREAMERS:



<sup>51,54</sup> Marketcast, Q3 2022, self-reported n=4,501

<sup>52</sup> MRI - Nov 2022 Cord Evolution, self-reported survey data

<sup>53</sup> Qualtrics Custom Study, Q1 2022. Note: Disney, Netflix and others have also committed to <6min/hr

<sup>55</sup> Magid, Q3 2022 self-reported, n=2,000 & stream AVOD & SVOD



# DEEP DIVE ON FAST CHANNELS

## Free streaming television comes in two forms: AVOD and Free Ad-Supported TV (FAST) channels.

As both offer audiences free content that's ad-supported, it's reasonable to confuse the two. FAST channels are free, curated streaming channels that have a look and feel similar to standard cable. AVOD services offer movies and shows on demand, with users choosing from thousands of titles.

In terms of programming, FAST often accesses large libraries of legacy content that are no longer available through Linear TV. This tactic proves beneficial to streaming audiences who enjoy revisiting older movies and shows not available elsewhere. Users also appreciate how quick and simple FAST channels are to use and how they differ from existing cable packages.

## FAST CHANNELS

Across **22** major providers,  
there are more than **1,500**  
channels providing content to  
over **190 million** users

The number of FAST channels is on the rise. Across 22 major providers, there are more than 1,400 channels<sup>56</sup> providing content to over 190 million users<sup>57</sup>. The user number may be inflated, as streamers frequent multiple services, but advertisers are certainly taking notice.

In 2022, FAST grossed over \$2 billion in domestic ad revenue. This figure is expected to double in 2023, and hit \$6.1 billion by 2025.<sup>58</sup>

Even Smart TV manufacturers are getting a piece of the action. Samsung, LG, and Vizio have built in revenue streams by embedding FAST networks in their operating systems.

Gains in FAST considered, linear TV maintains the sizable advantage in terms of total viewing time. According to Nielsen, US adults watch over three hours of live television every day, but only 10 to 15 minutes is through free streaming.<sup>59</sup>

This discrepancy affords an opportunity for growth. As audiences further shift online, AVOD is poised to grow viewership by supplying streamers more of the content they love: comedies, dramas, news, sports, documentaries, classic TV, and, increasingly, original content.

The numbers speak for themselves:



**1 IN 5**  
**AVOD streamers**  
**have watched a**  
**Tubi FAST channel**  
in the past 12 months<sup>60</sup>

Tubi has over 200 FAST Channels, (including 69 Entertainment, 127 live and local non-opinion based News, 14 Sports), and YoY Viewership Growth is up 63%.<sup>61</sup>

<sup>56,58</sup> Variety Intelligence Platform - Life in the Fast Lane, Dec 2022

<sup>57,59</sup> nScreenMedia

<sup>60</sup> MRI - Nov 2022 Cord Evolution, self-reported survey data

<sup>61</sup> Tubi Internal Data Sept 2022

# STREAMER EXPECTATIONS AND EXPERIENCE

There's a reason why four out of five SVOD users are satisfied with their TV services, but 75% of free over-the-air television viewers are not.<sup>62</sup>

Adjusting an antenna for better picture quality on a few channels is not the user experience audiences have come to expect.

**4 IN 5**

**SVOD users are satisfied** with their TV services

**3 IN 4**

Free over-the-air **TV viewers are not satisfied**

**Content may be king, but it's not the only thing audiences pay attention to. Ease of use and a good first impression are key, and the bar is set higher for free.**

When deciding on a service, 34% of streamers expect ease of use in SVODs, and 54% for FAST/AVOD. FAST and VOD services are also expected to provide value in terms of cost, high caliber content libraries, and attractive original programming. Streamers want to choose from thousands of titles, watch them with family or friends, and sometimes share accounts to keep costs low.

## TOP 3 PRIORITIES FOR STREAMERS

### Free Service

content variety

content quality

easy to use platform

### Paid Service

content quality

no ads

low subscription fee<sup>64</sup>

## When deciding on a service

**54%**  
of Streamers

Expect ease of use from FAST/AVOD<sup>63</sup>

**34%**  
of Streamers

Expect it from SVOD

When considering SVODs, one of the top drivers is original content. 87% of streamers like, expect, or require original content.<sup>65</sup> This explains why the Netflix catalog, which features 50% original content that audiences can't find elsewhere, is so attractive to streamers.<sup>66</sup> This trend also holds across AVOD—nearly 1 in 4 Tubi streamers age 18-34 require original content when choosing streaming services.<sup>67</sup>

<sup>62</sup> MarketCast, self-reported survey data

<sup>63, 64</sup> Qualtrics, Q1 2022, self-reported n=3,137 and stream 1+ hr a week

<sup>65, 67</sup> B2B Segmentation Study, 2022, self-reported n=2,000

<sup>66</sup> Variety Intelligence Platform, Dare to Stream

# CONTENT—TUBI DEEP DIVE

**Tubi asked more than 3,000 streamers how they choose a streaming service. The results showed that quality content, live streaming, and low ad loads were most important.<sup>68</sup>**

Across streaming and linear TV, what audiences care most about is entertaining content, original and otherwise. With the largest free streaming library (50,000+ titles), more than 200 live channels, and one of the lightest ad loads in AVOD, Tubi puts the streamer first.

Vast entertainment catalogs provide many viewers with as much quantity and variety as they need. Heavy streamers, however, seek original content to remain entertained.

Of Tubi Streamers that watch original content, 36% of this audience views over five hours of programming a week. These individuals also display a strong affinity for daily AVOD streaming (57%), have a high familiarity with the Tubi platform (70%), and would be disappointed if free streaming services were no longer available (63%).<sup>69</sup>

Tentpole content stimulates engagement on AVOD as well. When Tubi hosted VOD content for the 2022 FIFA World Cup, brand metrics such as awareness, consideration, and net promoter score all rose considerably.<sup>70</sup>

Exclusive access to television tailored to different backgrounds and preferences draws audiences closer to brands, who are more likely to regard the content as “can’t miss programming” and inclusive of diverse cultures and lifestyles.<sup>71</sup>

A diverse array of exclusive content not only drives audience interest, it commands it. Despite a small decrease in original content production YoY, 2022 alone still saw over 1,300 original titles released for streaming.<sup>72</sup>

Advertisers, like many streamers, increasingly focus on ad-supported platforms that emphasize original content. Tubi acknowledges this shift by developing more original content than ever—with over 150 Tubi Originals slated to be live by the end of 2023.

## TUBI VIEWERS THAT WATCH ORIGINAL CONTENT



**70%**

**High familiarity with Tubi**



**63%**

**Sad without free streaming option**



**57%**

**Stream daily**



**36%**

**View 5+ hours weekly**

<sup>68</sup> Qualtrics, Q1 2022, self-reported n=3,137 and stream 1+ hr a week

<sup>69</sup> <sup>70</sup> <sup>71</sup> MarketCast, self-reported survey data

<sup>72</sup> Variety Intelligence Platform, Dare to Stream


# USER EXPERIENCE

**AVOD user experience is defined by expectations.**

**Audiences expect hassle free streaming, seamless viewing on TVs and other screens, and minimal interruptions to their content.**

51% of streamers are satisfied with 6 minutes of ads per hour. Over 6 minutes, such as the 10+ minutes on some FAST services, and satisfaction drops below 50%.<sup>73</sup>

To manage ad load, 37% of streamers are willing to pay for ad-free or “ad-light” streaming. This increases with younger audiences: 47% of A18-34 are willing to pay to reduce ads and the most ad averse are men 18-34 and parents (over 50%).



**3 IN 4**  
**Streamers want their login info and viewing progress auto saved**

Audiences prioritize ease of use for functional and practical reasons. Three out of four streamers want their login information and viewing progress automatically saved, so they can pick up their content right where they left off on any of their internet-enabled screens.<sup>74</sup>



Audiences expect superior streaming quality. 22% of young streamers say they'll abandon a show or movie if playback or buffering issues occur.<sup>75</sup> Quality issues stop more users from streaming than ads (17%).

**22%** of Young Streamers  
**Say they'll abandon a show or movie if playback or buffering issues occur<sup>75</sup>**

**17%** of Young Streamers  
**Will stop watching a show or movie because ads interrupt the viewing experience**

American households stream more content on TV screens than on mobile and desktop combined.<sup>76</sup> As smart TVs, the fastest-growing segment of connected screens, and streaming devices become more commonplace, the barriers to AVOD entry have never been lower.

<sup>73, 74</sup> Qualtrics, Q1 2022, self-reported n=3,137 and stream 1+ hr a week

<sup>75</sup> B2B Segmentation Study, 2022, self-reported n=2,000

<sup>76</sup> Comscore, State of Streaming



# PRICE

## Along with content, price is one of the biggest deciding factors for streamers.

81% of SVOD streamers pick services based on cost. Streamers factor whether content is ad free, but are 47% more likely to place importance on price.<sup>77</sup>

SVOD services are raising prices, and many platforms are leaning on ad-supported revenue as well. In 2022, Netflix and Disney+ raised rates and added ad-supported options ranging from \$7-\$11. These changes led to higher churn. 69% of Netflix cancellations cited price increases. 45% of Disney+ churn referenced insufficient value.<sup>78</sup>

The average US household pays about \$69 per month on streaming services.<sup>79</sup> At the same time, 31% of US consumers plan to cut back spending on subscription streaming. Why do they cancel? Most often, it's because of the cost—46% of cancellations were because "money is tight."<sup>80</sup>

## AVOD offers relief from rising SVOD costs and for audiences that look to spend less money in general.

### Key benefit is low fee

40%

50%

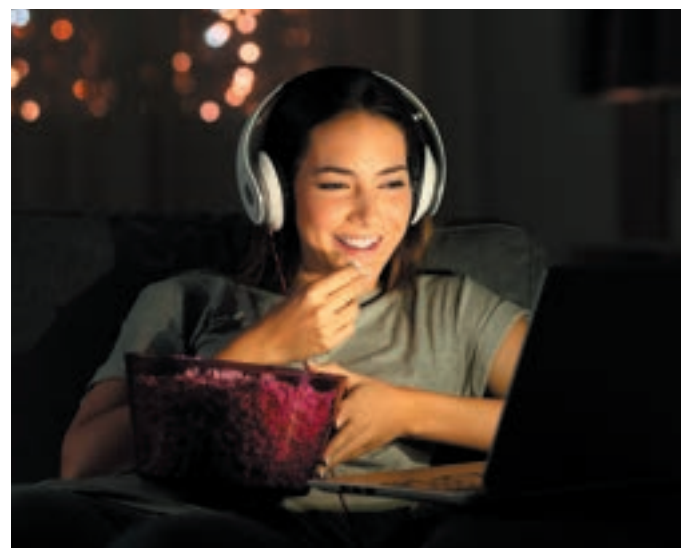
40% of AVOD streamers cite low fees as a key benefit to AVOD. This increases to 50% for Tubi streamers.<sup>81</sup>

In times where both streaming platforms and consumers look to limit expenses, the sentiment is that streamers' appetite for new content has not been met. The majority of streamers want to maintain or increase the number of SVODs they pay for in 2023, and are more likely to cut back on food, shopping, or travel than streaming entertainment.<sup>82</sup>



**1 IN 3**  
Streamers see  
**AVOD as a cost  
effective alternative**  
to paying for television<sup>83</sup>

**These streamers seek quality entertainment without financial sacrifice. AVOD lets audiences have their streaming cake and eat it too.**



<sup>77, 82</sup> Variety Intelligence Platform, Dare to Stream

<sup>78, 80</sup> Variety Intelligence Platform, Dare to Stream p. 33

<sup>79</sup> Marketcast, Q3 2022, self-reported n=4,501

<sup>81</sup> MRI - Nov 2022 Cord Evolution, self-reported survey data

<sup>83</sup> Qualtrics, Q1 2022, self-reported n=3,137 and stream 1+ hr a week

# ACCOUNT SHARING

One way users limit the costs associated with streaming is by sharing a single account across multiple households.



Given the back and forth nature of streaming account sharing, 55% of streamers want the ability to share logins. To make things even more simple, 45% of streamers want to be able to use the platform without having an account.<sup>84</sup>

Billions of dollars in subscription revenue are lost every year from account sharing. Services like Netflix are taking aim to curb these losses by charging accounts shared across multiple households.<sup>85</sup> This is expected to increase churn.

Pure AVOD, on the other hand, is free. Users with accounts experience no limitations creating more accounts, or when multiple streamers watch under the same account.

2023 has all the makings of a free-for-all among SVOD and AVOD services with consumers presented with no shortage of choices. Compared to the confusing product mix on some platforms of free, paid, and premium SVOD options, totally free AVOD is an appealing option for audiences that want to use a streaming account on their terms.

STREAMERS BY AGE AND GENDER	USE SOMEONE ELSE'S ACCOUNT	SHARES THEIR OWN ACCOUNT
F18-34	49%	52%
A18-34	46%	48%
M18-34	41%	40%
A18+	35%	36%
F35-54	27%	31%
A35-54	26%	30%
M35-54	25%	28%

<sup>84</sup> Qualtrics, Q1 2022, self-reported n=3,137 and stream 1+ hr a week

<sup>85</sup> Variety Intelligence Platform, Dare to Stream

# COVIEWING

**People don't just want to share their streaming accounts, they want to share viewing experiences as well.<sup>86</sup>**

Coviewing, where users watch television collectively in groups, brings people together through entertainment. Across linear and streaming, 4 in 5 domestic consumers coview content.<sup>87</sup> 51% of AVOD streamers coview more today than they did three years ago.<sup>88</sup>



**4 IN 5**

Domestic consumers  
**coview content**

With the rise of Smart TVs and CTV devices, it's never been easier to stream content into the home.<sup>89</sup> From the comfort of their living rooms, streamers share news, movies, comedies, children's programming, and more with family and friends.

Coviewing is a social experience. 53% of Tubi streamers coview "to spend time with each other" while 41% stream with others "to be able to talk with each other about the show."<sup>90</sup>

Tubi streamers are especially active coviewers. Compared to national average, Tubi streamers are 12% more likely to watch children's content with a child, 32% more likely to share a comedy with another adult family member, and 36% more likely to coview the news with friends.<sup>91</sup>

The result is multiple engaged individuals who want to connect with their content and one another. Thanks to coviewing, advertisers are able to expand the saturation of their messaging by reaching families and entire households.

## TUBI VIEWERS

# COVIEW



**53%**

**Coview for company**



**41%**

**Coview to stay in sync**



**36%**

**more likely to coview**

**News with friends**



**32%**

**more likely to coview**

**Comedy with family**



**12%**

**more likely to coview**

**Kids shows with kids**

<sup>86, 87, 88, 90, 91</sup> MRI - Aug 2022 Cord Evolution, self-reported survey data

<sup>89</sup> eMarketer - Advanced TV 2022

# TYPES OF STREAMERS

Non-streamers represent just 29% of the US television audience.

The non-streaming audience is less multicultural, more likely to be lower income, and with a median age of 64, nearly 20 years older than the average streamer. To better understand the 71% of the US that streams, Tubi commissioned a segmentation study of 2,000 streamers with market research firm B2B International. They identified five distinct streamer types: engaged premium streamers (21%), older attentive streamers (19%), recommendation seekers (11%), lone ranger bingers (11%), and genre-focused browsers (9%).<sup>92</sup>

Among these audiences, each emphasized the importance of effective content recommendations, quality content, and straightforward platform interfaces.<sup>93</sup>

Platforms that provide personalized content recommendations enhance engagement for all streamer types, but especially among those who take longer to decide what to watch next. A broad array of quality content is the best way to appeal to diverse audiences of browsers, bingers, and premium streamers. In order for audiences to discover new content, a streaming platform must be simple to use and explore.

Tubi caters its content recommendations to the preferences of its streamers, offers an interface that is easy to navigate, and provides an industry leading library of over 50,000 titles—which is sorted by our recommendation algorithm to create a bespoke personalized experience.

<sup>92, 93</sup> B2B Segmentation Study, 2022, self-reported n=2,000

### ENGAGED PREMIUM STREAMERS:

Spend the most time streaming, view content at the highest frequency, are more educated, and have higher incomes.

### OLDER ATTENTIVE:

Place high emphasis on word of mouth recommendations, take longer to discover new streaming content, and require easy to use interfaces.

### RECOMMENDATION SEEKERS:

Are interested in content with buzz on and offline. Social media suggestions and platform recommendations guide their content discovery.

### LONE RANGER BINGERS:

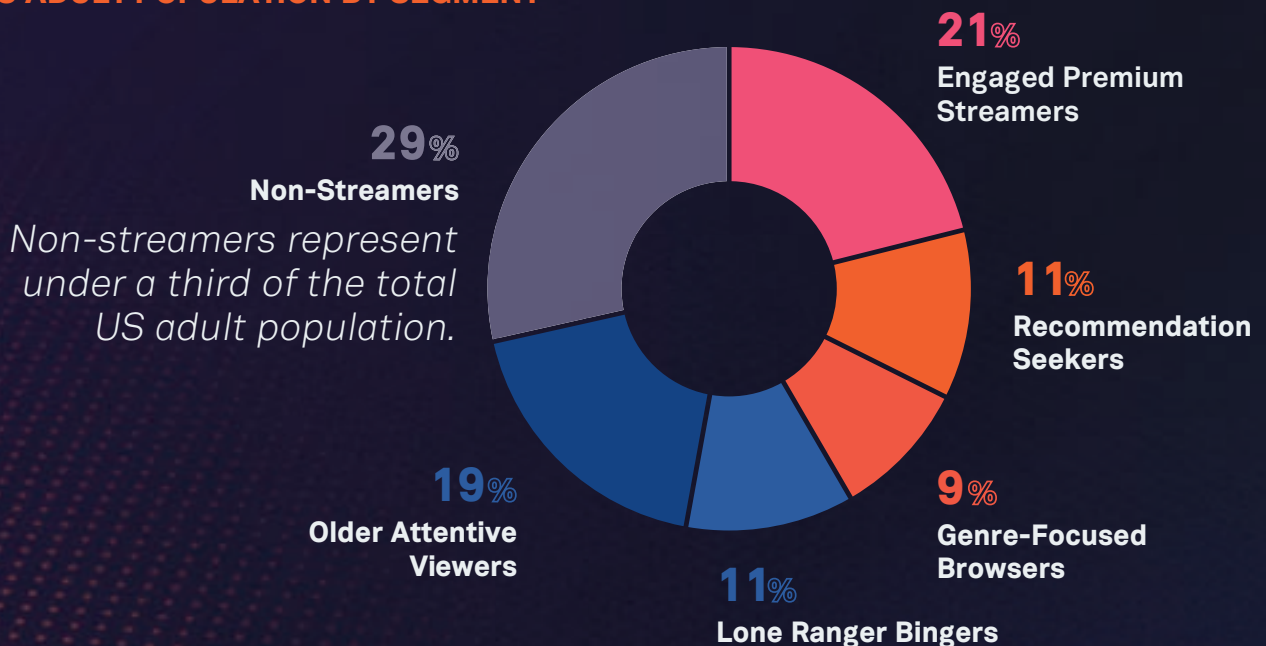
Enjoy streaming multiple episodes in one sitting. They seek captivating content in large quantities that is also easy to find.

### GENRE-FOCUSED BROWERS:

Want a solid mix of categorized entertainment. Platform simplicity is essential to keeping them engaged.

## Sizing the Prize:

### TOTAL US ADULT POPULATION BY SEGMENT





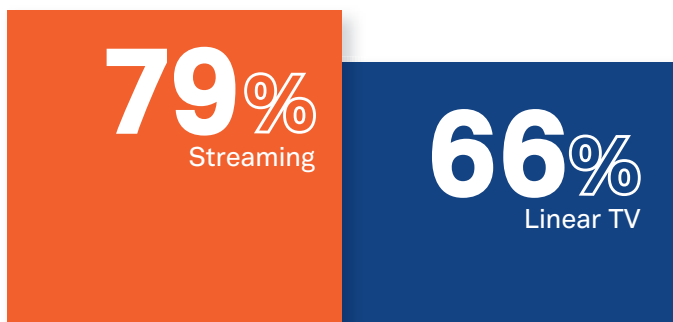
# What About ADVERTISERS?

As advertisers take stock of the state of streaming TV, more ad dollars and greater percentages of budgets are being dedicated to streaming buys than ever before.

**2x** | From 2022 to 2026, CTV ad spends are projected to more than double from \$18.9 billion to \$38.3 billion.<sup>94</sup>

**In a survey of video advertisers with multimillion dollar budgets, more advertisers now regard advertising on streaming television as highly valuable (4 out of 5) than they do linear TV (2 out of 3).<sup>95</sup>**

**Big budget advertisers value advertising on...**



40% of ad buyers intend to increase their CTV budgets moving forward whereas only 1% plan to decrease their spend.<sup>96</sup> By comparison, 12% expect to spend less on linear TV in the future.<sup>97</sup>

Growth in monthly active users, the presence of young and multicultural streamers, and the ability to reach hard to find audiences are key drivers for AVOD ad spend.<sup>98</sup> 25% of Tubi's more than 60 million monthly streamers can't be found on competing free AVODs.<sup>99</sup>

AVOD allows advertisers to find the streamers looking outside paid television packages and streaming subscriptions. Free ad-supported streaming from extensive content catalogs provides audiences entertainment without commitment.

Forecasts project that half the US population will use AVOD by 2026.<sup>100</sup> Coupled with SVOD ad adoption and price increases, the components are present for AVOD to grow even faster.

More than half of the US population is aware of Tubi,<sup>101</sup> and advertisers are following suit—24% of advertisers regard Tubi among streaming market leaders.<sup>102</sup> Its low ad loads are well received by streamers,<sup>103</sup> which stimulates viewership and creates more opportunities for brands to benefit from Tubi's ad tech matching audiences and context with relevant messaging.

**24%** | **Advertisers regard Tubi as a market leader**

<sup>94, 96, 97</sup> eMarketer, June 2022

<sup>95, 102</sup> Ad Perceptions, 2Q 22

<sup>98, 99</sup> MRI - Nov 2022 Cord Evolution

<sup>100</sup> eMarketer - Advanced TV 2022

<sup>101</sup> YouGov Brand Index, Q4 2022

<sup>103</sup> Qualtrics, Q1 2022, self-reported n=3,137 and stream 1+ hr a week

# ADVERTISER'S PERSPECTIVE

**Ad relevance and reach are critical to streaming ad buys, but how a company is perceived in relation to the content it's displayed beside carries a significant amount of weight.**

**Brand safety, or precautions taken to avoid association with potentially offensive or inappropriate content, is top of mind for the majority of advertisers.**

## Brand Safety



Rather than placing ads next to potentially volatile media, such as short-form user generated content or unpredictable amateur content distribution, some brands are suspending advertising from social platforms entirely.<sup>105</sup> Targeted CTV ads allow advertisers to deliver their messaging alongside content made for the big screen, with clearly indicated MPAA and TV Parental Guideline ratings.

When advertisers need a brand safe environment, they choose partners like Tubi.<sup>106</sup> All content on Tubi is professionally composed for national broadcast or

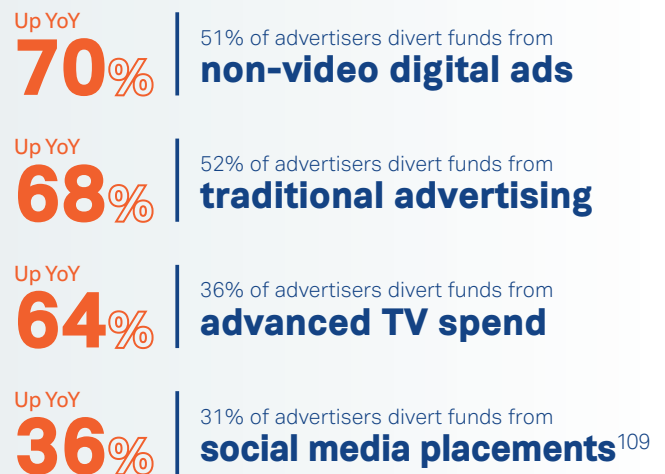
cinema. Brands can designate what types of television they want to avoid, such as R-rated programming, and emphasize genres of interests to target through content clustering.

Video ads are more calculated than random social placements and more immersive than online banner ads. 78% of brands surveyed purchase standard video ads in their CTV buys, often to complement linear TV campaigns. In 2022, this was the format displayed most often by Tubi, and the format preferred by consumers.<sup>107</sup>



**The safety of CTV ad buys continues to attract greater shares of advertisers' video ad dollars, which grew 14% YoY<sup>108</sup>**

## TO PRIORITIZE CTV PLACEMENTS, ADVERTISERS REPORT DIVERTING FUNDS FROM EXISTING AD BUDGETS:



Given the brand safe possibilities of CTV advertising, as well as the expansion of ad inventory across the industry,<sup>110</sup> brands have begun emphasizing streaming investments to make an impact.

<sup>104, 110</sup> eMarketer - Advanced TV 2022

<sup>105</sup> Forbes 2022 - (LINK)

<sup>106</sup> Ad Perceptions, 2Q 22

<sup>107</sup> Magid, Q3 2022 self-reported, n=2,000 & stream AVOD & SVOD

<sup>108, 109</sup> Ad Perceptions, 1H 22

# CASE STUDIES

**Advertisers' perceptions of the Tubi brand are strong and moving forward positively into 2023 and beyond.**

**As the following case studies show,**

Tubi consistently gives clients opportunities to outperform their marketing KPIs and optimize their CTV strategy up and down the marketing funnel.



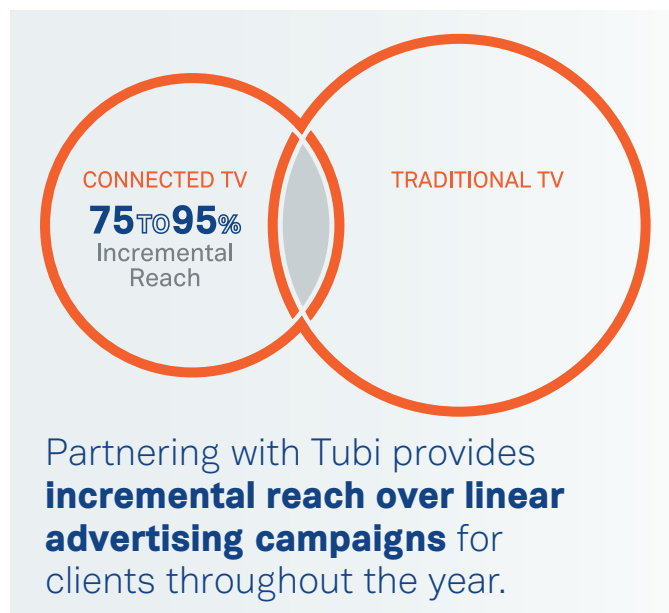
# CASE STUDIES

## INCREMENTAL REACH

Through Tubi's Certified Measurement Partner program, InnovidXP helps to bring together OTT, linear viewership and ad occurrence data, representing Tubi's massive streaming footprint.

**With this partnership, it was proven that Tubi was able to provide, on average, 75-95% incremental reach over linear advertising campaigns for clients throughout 2022. This covered over 500 million impressions across a variety of advertising categories.**

**In these examples from 2022, Tubi efficiently provides unique reach for client campaigns advertising on-platform as well as linear, regardless of category.**



## ACROSS 2022 CAMPAIGNS:

**98% INCREMENTAL REACH**

Provided by Tubi for a **nationwide QSR's** advertising campaign

**96% INCREMENTAL REACH**

For one **auto company's** advertising campaign, 15 mil. impressions

**96% INCREMENTAL REACH**

**Major insurance provider's** campaign, 25 mil.+ impressions

**91% INCREMENTAL REACH**

Provided by Tubi for **CPG category**, to client campaigns



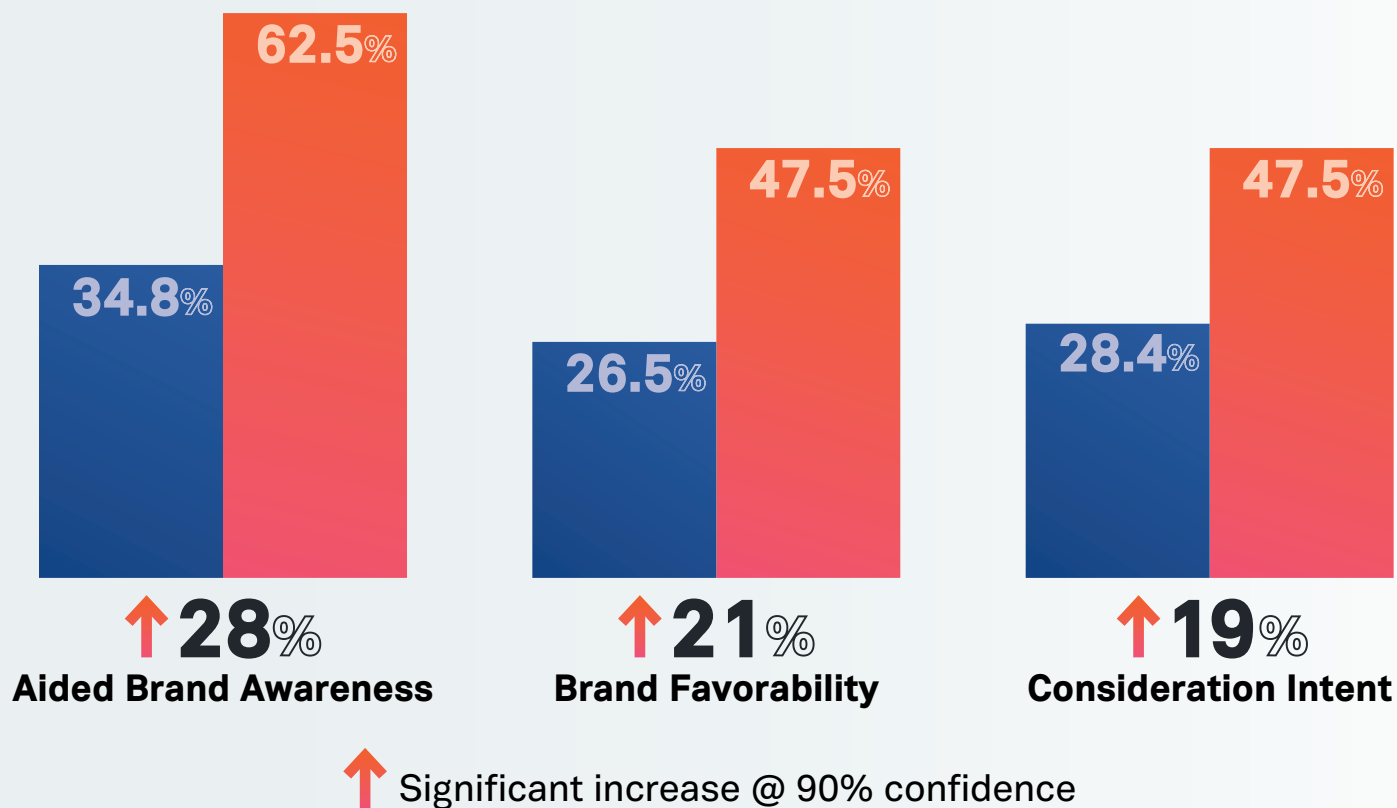
# CASE STUDIES

## BRAND LIFT

**When advertising on-platform, Tubi not only provides brands with staggering amounts of incremental reach, but also with impressive lift across key brand metrics and messaging agreement.**

For a leading motor vehicle services company that offers auto insight, advice, and news, Tubi worked with Certified Measurement Partner KANTAR to measure campaign performance. KANTAR captured exposure data from the Tubi campaign, and leveraged their proprietary methodology to then match those exposed users to a control group within the KANTAR panel with similar demographic, geographic, and behavioral attributes, and sent both groups a customized survey.

### WITHIN THIS 2022 CAMPAIGN, THE AUTO BRAND SAW:



# CASE STUDIES

## FOOT TRAFFIC/SALES LIFT

**Moving further down the marketing funnel, Tubi is also able to drive impactful foot traffic for businesses looking to drive in-store sales and visitation—across investment levels.**

**Tubi is able to push visitors to brick and mortar locations at an efficient cost per visit. The below examples come from Tubi's work in partnership with Foursquare.**

Tubi was able to provide one major, nationwide QSR with impactful lift in foot traffic to their business. Further, as the monthly campaign investment increased, the cost per visit became more efficient.



And for the entirety of the campaign, the average **cost per visit** was **\$0.45**

Tubi was also able to provide effective increases in bottom of the funnel marketing metrics for a global telecommunications company.



Over a four month advertising campaign, Tubi provided this company with a **return on ad spend** of **4.1X** and a **\$1.11 cost per visit**



# OVERALL STREAMERS

**HUGE LIBRARY:** 50,000+ Titles

**TV STREAMERS:** 64M MAUs

**FULL ATTENTION:** 5.1 billion hours streamed in 2022

**RAPID GROWTH:** 44% YoY growth in calendar year TVT

## GENDER:

**50%**

Female

**50%**

Male

## AGE:

**4%** Less than 18 years old

**36%** 18-34 years old

**34%** 35-54 years old

**26%** More than 55 years old

## ETHNICITY:

**67%** Caucasian

**17%** Hispanic

**21%** African American

**4%** Asian

## INCOME:

**19%** \$150K+

**18%** \$100K - \$150K

**30%** \$50K - \$99K

**33%** Less than \$50K

## EDUCATION:

**13%** Graduate School

**18%** College

**29%** Some College

**40%** High School

## THE TUBI STREAMER

A young, diverse, nationally representative TV audience, not often reached via linear TV advertising or other AVOD platforms.

**KIDS IN HOUSEHOLD:** 26%

**TV STREAMERS:** 76% watching on a TV

**CO-VIEWING HOUSEHOLDS:** 80% of Tubi streamers co-view

**CABLE-FREE:** 73%

**INCREMENTAL TO LINEAR:** 75+ InnovidXP client studies running on Tubi showed 75%+ incremental reach to their Linear campaigns

**INCREMENTAL TO AVODS:** 25% of Tubi streamers can't be found on other major, free AVODs

## TOP STREAMING DMA'S:



### TOP 5 SERIES GENRES:

- 1 Comedy
- 2 Drama
- 3 Western
- 4 Reality
- 5 Animation

### TOP 5 MOVIE GENRES:

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

## LIVING IN:

**30%** Suburb

**43%** Urban

**27%** Rural

## REGION:

**16%** North East

**41%** South

**23%** Midwest

**20%** West

## POLITICAL LEANINGS:

**33%** Democrat

**25%** Republican

**42%** Independent

# YOUNGER STREAMERS

**AGE:** 18-34 years old

**TV STREAMERS:** 79% streamed via OTT past 30 days

**CO-VIEWING:** 84% coview content with others

**HOUSEHOLDS WITH KIDS:** 30%

**CABLE-FREE:** 81%

**36%**  
OF MONTHLY  
ACTIVE USERS



## GENDER:

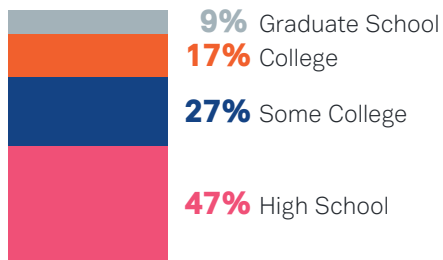
**56%**

Female

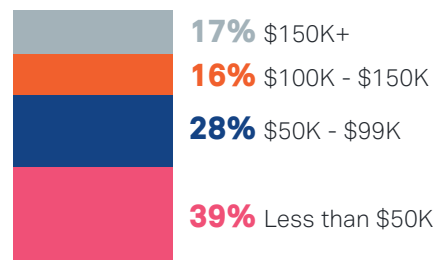
**44%**

Male

## EDUCATION:



## INCOME:



## SERIES

### Top Genres:

- 01 Comedy
- 02 Drama
- 03 Animation
- 04 Reality
- 05 Action

### Top Titles 2022:



### More Likely to Buy:

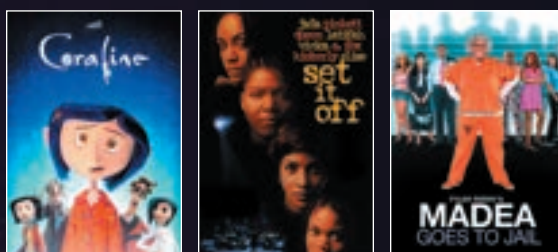
- | Beauty Products [193 Index]
- | Video games [180 Index]
- | Fashion—Clothes & Shoes [175+ Index]
- | Entertainment [170 Index]
- | Baby Products [170 Index]

## MOVIES

### Top Genres:

- 01 Comedy
- 02 Drama
- 03 Action
- 04 Horror
- 05 Thriller

### Top Titles 2022:



### Insight:

The young Tubi streamer is diverse, skews female, and more likely to live in cities. Nearly 3 in 4 are Cordless and they enjoy a variety of content on-platform.



# OLDER STREAMERS

**MEDIAN AGE:** 35-54 years old

**TV STREAMERS:** 82% streamed via OTT past 30 days

**CO-VIEWING:** 83% coview content with others

**HOUSEHOLDS WITH KIDS:** 41%

**CABLE-FREE:** 73%

**34%**  
OF MONTHLY  
ACTIVE USERS



## GENDER:

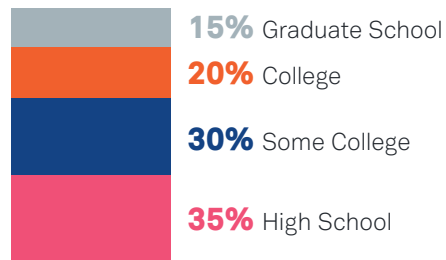
**46%**

Female

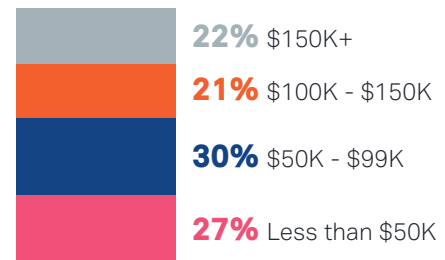
**54%**

Male

## EDUCATION:



## INCOME:



## SERIES

### Top Genres:

- 01 Drama
- 02 Comedy
- 03 Animation
- 04 Action
- 05 Reality

### Top Titles 2022:



### More Likely to Buy:

- | Alcohol [147 Index]
- | Shoes [138 Index]
- | Sporting Equipment [137 Index]
- | Entertainment [132 Index]
- | Beauty Products [126 Index]

## MOVIES

### Top Genres:

- 01 Drama
- 02 Action
- 03 Horror
- 04 Comedy
- 05 Thriller

### Top Titles 2022:



### Insight:

Older Tubi streamers are diverse, higher income, and well-educated. They love to purchase products across categories, over-indexing on alcohol, entertainment, shoes, and beauty products.

# LATINX STREAMERS

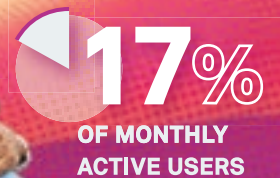
**MEDIAN AGE:** 38 years old

**TV STREAMERS:** 84% streamed via OTT past 30 days

**CO-VIEWING:** 81% coview content with others

**HOUSEHOLDS WITH KIDS:** 32%

**CABLE-FREE:** 73%



## GENDER:

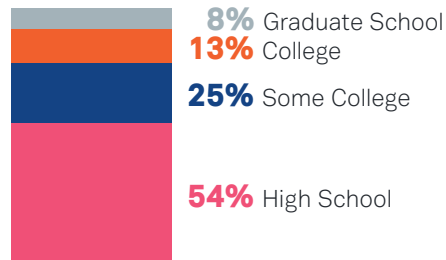
**50%**

Female

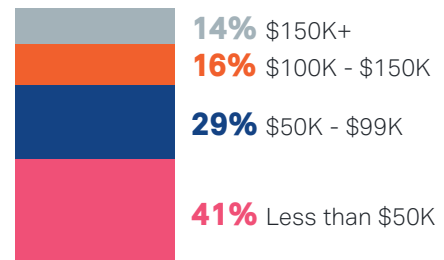
**50%**

Male

## EDUCATION:



## INCOME:

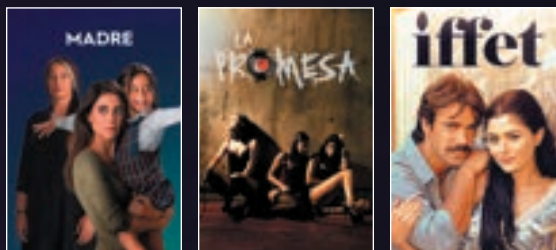


## SERIES

### Top Genres:

- 01** Family/Kids
- 02** Soap Operas/  
Telenovelas
- 03** Animation
- 04** Sci-Fi/Fantasy
- 05** Horror

### Top Titles 2022:



### More Likely to Buy:

- | Beauty Products [169 Index]
- | Coffee [140 Index]
- | Fashion—Clothes & Shoes  
[125+ Index]
- | Dieting Products [111 Index]
- | Education [111 Index]

## MOVIES

### Top Genres:

- 01** Romance
- 02** Family/Kids
- 03** Animation
- 04** Sci-Fi/Fantasy
- 05** Crime

### Top Titles 2022:



### Insight:

LatinX Tubi streamers are more likely to live in cities and have children in the household. They have a strong likelihood of buying educational products, coffee, and beauty/fashion products.



# FAMILY STREAMERS

**MEDIAN AGE:** 39 years old

**TV STREAMERS:** 81% streamed via OTT past 30 days

**CO-VIEWING:** 94% coview content with others

**HOUSEHOLDS WITH KIDS:** 100%

**CABLE-FREE:** 79%

**26%**  
OF MONTHLY  
ACTIVE USERS



## GENDER:

**64%**

Female

**36%**

Male

## KIDS AGES:

**22%** < 2 years old

**35%** 2-5 years old

**35%** 6-9 years old

**33%** 10-13 years old

**37%** 14-17 years old

## EDUCATION:



**14%** Graduate School

**19%** College

**27%** Some College

**40%** High School

## INCOME:



**23%** \$150K+

**19%** \$100K - \$150K

**28%** \$50K - \$99K

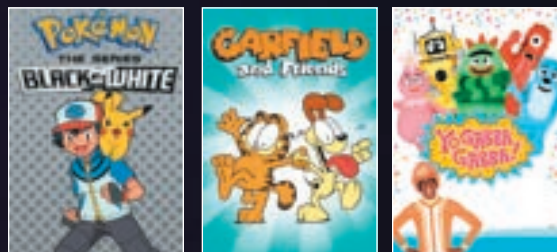
**30%** Less than \$50K

## SERIES

### Top Genres:

- 01** Family/Kids
- 02** Reality
- 03** Animation
- 04** Sci-Fi/Fantasy
- 05** Horror

### Top Titles 2022:



### More Likely to Buy:

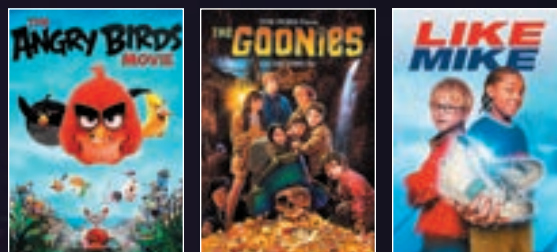
- | Products for Babies [196 Index]
- | Beauty Products [194 Index]
- | Items for Parenting [157 Index]
- | Educational Products [137 Index]
- | Cleaning Products [137 Index]

## MOVIES

### Top Genres:

- 01** Romance
- 02** Family/Kids
- 03** Crime
- 04** Horror
- 05** Comedy

### Top Titles 2022:



### Insight:

Families that stream Tubi are diverse, skew younger, and have high income. Naturally, they are likely to purchase products related to parenting, babies, education, and the household.

# BLACK STREAMERS

**MEDIAN AGE:** 37 years old

**TV STREAMERS:** 83% streamed via OTT past 30 days

**CO-VIEWING:** 79% coview content with others

**HOUSEHOLDS WITH KIDS:** 29%

**CABLE-FREE:** 78%

**21%**  
OF MONTHLY  
ACTIVE USERS

## GENDER:

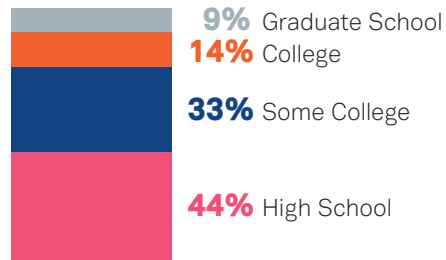
**61%**

Female

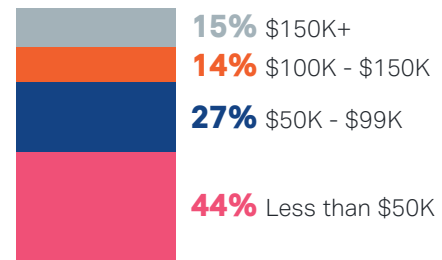
**39%**

Male

## EDUCATION:



## INCOME:

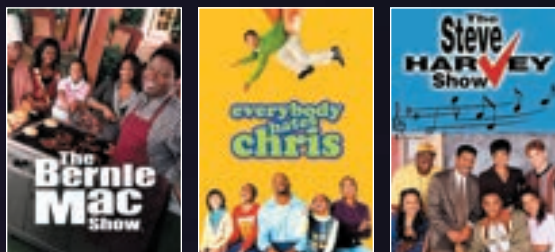


## SERIES

### Top Genres:

- 01** Family/Kids
- 02** Animation
- 03** Reality
- 04** Horror
- 05** Thriller

### Top Titles 2022:



### More Likely to Buy:

- | Fashion: Clothes & Shoes [200+ Index]
- | Food [213 Index]
- | Beauty Products [186 Index]
- | Baby Products [168 Index]
- | Snacks [161 Index]

## MOVIES

### Top Genres:

- 01** Horror
- 02** Thriller
- 03** Sci-Fi/Fantasy
- 04** Crime
- 05** Animation

### Top Titles 2022:



### Insight:

Black Tubi streamers skew much younger than gen pop and appreciate a variety of genres on-platform. They are likely to buy fashion, food, snacks, beauty products, and more.



# CONCLUSION

**2022 was a great year for AVOD, and 2023 has the makings of something monumental. Millions of satisfied viewers agree: Ad-supported streaming is the future.**

It's no longer a question of whether ad-supported streaming presents significant opportunities for advertisers. Accelerating AVOD's growth are the changes in TV and SVOD landscape, and the consumer appetite for cost effective alternatives.

Streamers want simple to use platforms that are loaded with content. And it takes more than "free" to keep streamers interested. They require fresh content and useful recommendations. They prefer light ad loads for less disruptive viewing, and easy account access or streaming without a login.<sup>111</sup>



**Free. Content-rich.  
Easy to use, and  
an ad load that's  
easy on the eyes.**

Tubi delivers on all of these streamer priorities, and that's one of the reasons millions of consumers rate us above our competitive set on 3 out of 4 major app stores (and a tie on that 4th store).<sup>112</sup>

We make entertainment easy for the consumer, and they return the favor with their attention to advertisements, allowing us to provide even more entertainment and create more advertising opportunities, a virtuous cycle.

We predict that 2023 will be a momentous year for Tubi, AVOD, and the advertisers that utilize these platforms to meet their marketing objectives.

<sup>111</sup> Qualtrics, Q1 2022, self-reported n= 3,137 and stream 1+ hr a week

<sup>112</sup> Consumer ratings, Apple, Google, Amazon, and Roku Channel store, Dec 2022

# ABOUT TUBI + FOX

## tubi + FOX

Tubi, Fox Corporation's ad-supported video-on-demand service, has over 50,000 movies and TV shows, including a growing library of Tubi Originals, 200+ local and live news and sports channels, and 400+ entertainment partners, featuring content from every major Hollywood studio. Tubi gives fans of film, television, news and sports an easy way to discover new content that is completely free.

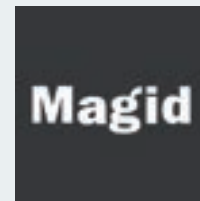
Tubi is available on Android and iOS mobile devices, Amazon Echo Show, Google Nest Hub Max, Comcast Xfinity X1, Cox Contour, and on connected television devices such as Amazon Fire TV, Vizio TVs, Sony TVs, Samsung TVs, Roku, Apple TV, Chromecast, Android TV, PlayStation 5, Xbox Series X | S, and soon on Hisense TVs globally. Consumers can also watch Tubi content on the web at [www.tubi.tv](http://www.tubi.tv).

## About the Data

Tubi commissioned survey research with leading industry insights providers such as MarketCast, Magid, and Qualtrics to better understand the streaming landscape of 2022. These surveys and their sample sizes have been cited throughout the paper.


We also analyzed a number of first-party and third-party data sources, especially a combination of MRI and self-reported data. Where possible, when a public source aligns with proprietary studies (or adds net new information), we link to the publicly available studies below for your access to data exploration, reference and citation.

## Research Partners



## PUBLIC RESEARCH CITED

SOURCE	LINK
<b>eMarketer - US Connected TV Advertising Forecast 2022 Report</b>	<a href="https://content-na1.emarketer.com/us-connected-tv-advertising-forecast-2022">https://content-na1.emarketer.com/us-connected-tv-advertising-forecast-2022</a>
<b>eMarketer - Advanced TV 2022</b>	<a href="https://content-na1.emarketer.com/advanced-tv-2022">https://content-na1.emarketer.com/advanced-tv-2022</a>
<b>eMarketer - Sept 2022</b>	<a href="https://forecasts-na1.emarketer.com/6143b6e2ea9f2002f0b8371f/603d-4310293d05035c94b638">https://forecasts-na1.emarketer.com/6143b6e2ea9f2002f0b8371f/603d-4310293d05035c94b638</a>
<b>Variety Intelligence Platform - Dare to Stream, Oct 2022 Life in the Fast Lane, Dec 2022</b>	<a href="https://variety.com/vip-special-reports/">https://variety.com/vip-special-reports/</a>
<b>eMarketer - Mar 2022</b>	<a href="https://content-na1.emarketer.com/tv-ad-spending-2022">https://content-na1.emarketer.com/tv-ad-spending-2022</a>
<b>eMarketer, Sept &amp; Oct 2022</b>	<a href="https://forecasts-na1.emarketer.com/632e352eb87d442a0c8bd8b8/59679aa80da-12c03a447471c">https://forecasts-na1.emarketer.com/632e352eb87d442a0c8bd8b8/59679aa80da-12c03a447471c</a>
<b>Forbes</b>	<a href="https://www.forbes.com/sites/forbestechcouncil/2022/06/06/whats-next-for-streaming-platforms-amid-economic-uncertainty/?sh=1c078f2e418c">https://www.forbes.com/sites/forbestechcouncil/2022/06/06/whats-next-for-streaming-platforms-amid-economic-uncertainty/?sh=1c078f2e418c</a>
<b>Comscore, State of Streaming</b>	<a href="https://www.comscore.com/Products/CTV/Streaming-Insights">https://www.comscore.com/Products/CTV/Streaming-Insights</a>
<b>eMarketer, Pitching CTV investment in 5 charts</b>	<a href="https://www.insiderintelligence.com/content/pitching-ctv-investment-5-charts">https://www.insiderintelligence.com/content/pitching-ctv-investment-5-charts</a>
<b>MediaPost, August 2022</b>	<a href="https://www.mediapost.com/publications/article/376488/survey-72-of-netflix-users-not-interested-in-swi.html">https://www.mediapost.com/publications/article/376488/survey-72-of-netflix-users-not-interested-in-swi.html</a>
<b>nScreenMedia</b>	<a href="https://nscreenmedia.com/nscreen-whitepapers/getting-fast-white-paper-final.pdf">https://nscreenmedia.com/nscreen-whitepapers/getting-fast-white-paper-final.pdf</a>



# THE STREAM

tubi + **FOX**