

TVB

Local Media
Marketing Solutions

Video Media Devices and Usage Study 2024 Synopsis

Video Media Devices and Usage Study: Key Insights

- Definitions of what is an Over-the-air, streaming household differs based on measurement vendor and even within a vendor can be changing. It is important to understand when a number is cited exactly what that number represents.
- The number of sets in the household makes a difference:
 - In penetration of vMVPD.
 - Whether it exclusively has an Over-the-air connection, or a streaming device oriented to SVOD and AVOD.
- Geography/size of market makes a difference:
 - SVOD/AVOD only devices(BBO) are more likely in rural areas and smaller size markets. Over-the-Air Only HH are also more likely in rural areas.
 - Virtual streaming providers are more likely in urban areas.
- 76% of households are able to access linear content through a mobile device. This numbers rises to 82% of Hispanics and 85% of Black/African Americans.
- An accurate local solution is needed to measure these audiences and deduplicate them across devices on a local market basis.

Purpose of The 2024 Video Media Devices and Usage Study

To better understand media device usage as it relates to video content within the top 75 markets, with the hope that its findings will help inform and improve the measurement of TV/Video audiences.

The TVB commissioned GfK/NIQ to do the study.

Research Methodology Overview

WHO:

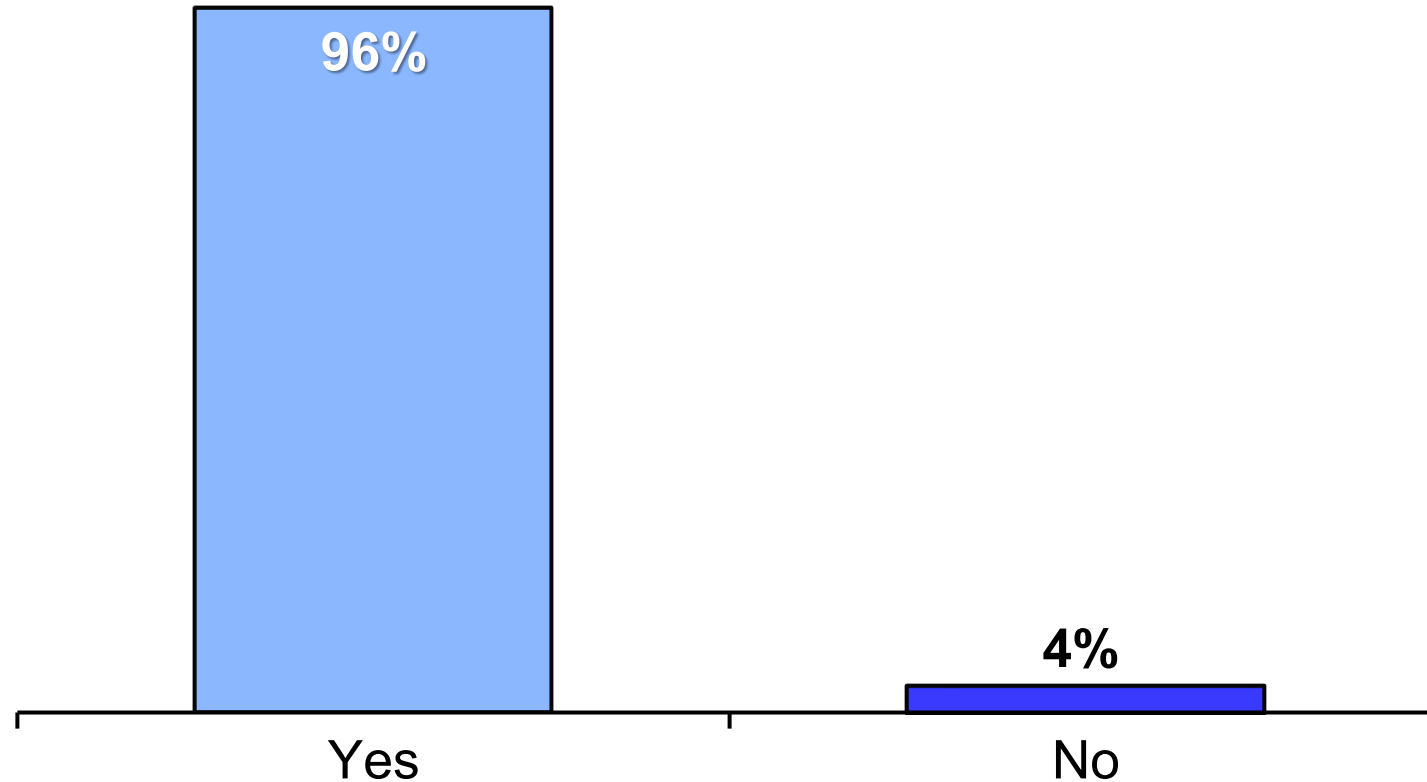
- This study was conducted online among a sample of over 10,000 Americans age 18+, by market, for the top 75 markets.
 - The sample was carefully collected to align demographically and ethnically within each of the top 75 markets, as well as what each individual market represents of the total U.S.

• How:

- Via an 8 and a half minute online quantitative study.
- Respondents were asked questions about number of sets in their household and then subsequent questions were asked for each of the sets e.g., which room they were in, how often used, connections, and content.
- Respondents were given the choice of taking the survey in either English or Spanish.
- **WHEN:** Interviews took place March 28th through April 22nd, 2024.

96% of Households Have a TV Set In Their Home To Watch Programs and Events

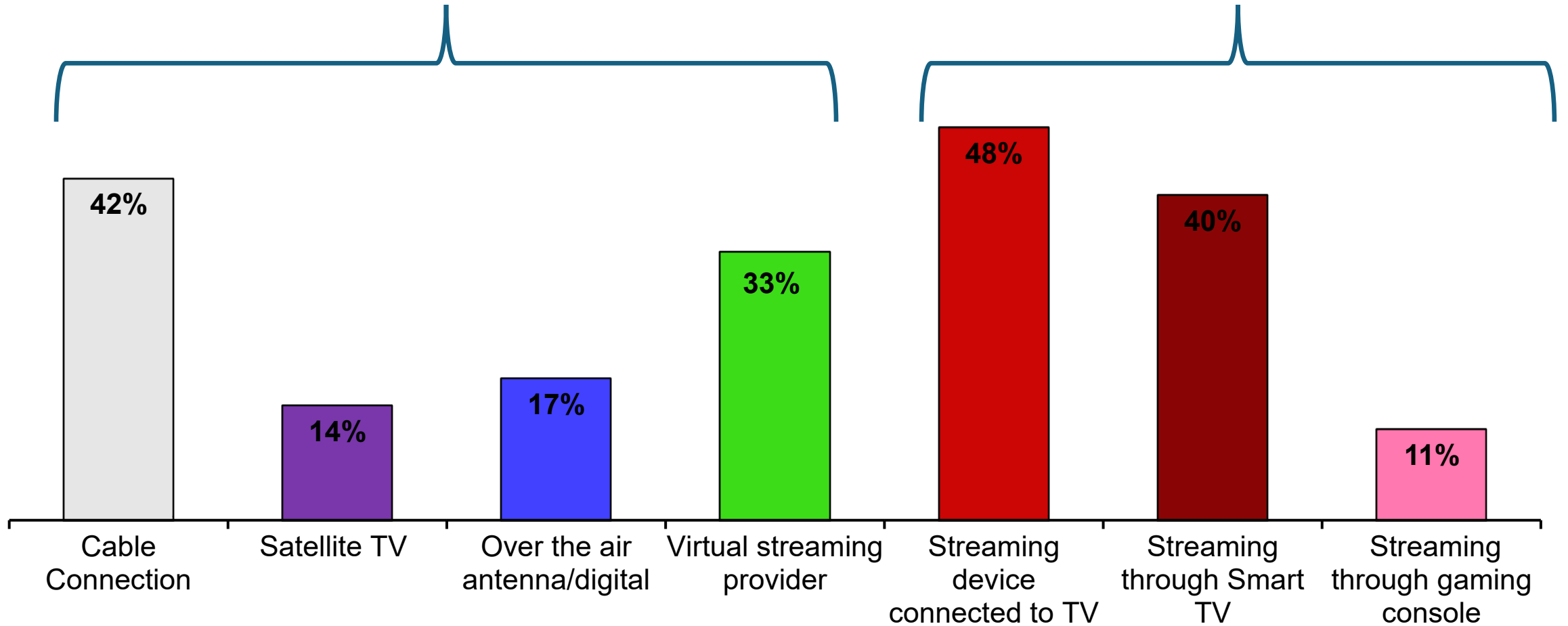
Do you have a television set in your home that is used to view programs/events either from television networks or streaming networks?



Source: GfK TVB Video Media Devices and Usage 2024 Study. Persons 18+. Top 75 markets. TV1 - Do you have a television set in your home that is used to view programs/events either from television networks (ABC, CBS, NBC, FOX, CW, ESPN, CNN, Discovery, TBS, TNT etc.) or streaming networks (like Netflix, Amazon, Disney+, The Roku Channel, Pluto TV, etc.)?

Linear Content 80%

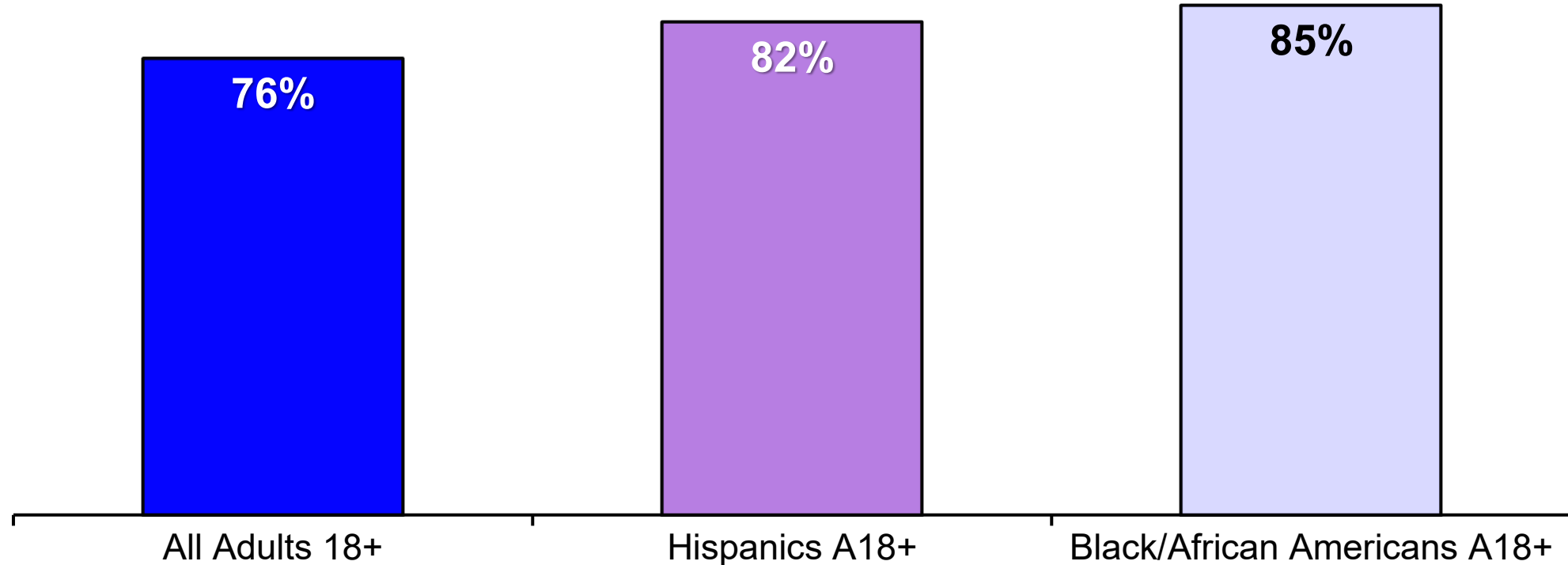
SVOD/AVOD Content 67%



Hispanic & Black/African Americans Capability To Stream Linear TV Programs and Events Through A Mobile Device is Higher Than Average

Are YOU able to stream on your smartphone, tablet, or PC live TV programming/sports on channels such as ABC, CBS, NBC, FOX, CW, ESPN, CNN, Discovery, TBS, TNT (the same as you might get on your TV screen) through either an app from your cable company, or through a virtual streaming provider (like YouTube TV, Hulu+Live TV, DirecTV Stream)?

Top 75 Markets



Source: GfK TVB Video Media Devices and Usage 2024 Study. Persons 18+, Hispanics 18+, Black/African Americans 18+. Top 75 markets. SS5 - Are YOU able to stream on your smartphone, tablet, or PC live TV programming/sports on channels such as ABC, CBS, NBC, FOX, CW, ESPN, CNN, Discovery, TBS, TNT (the same as you might get on your TV screen) through either an app from your cable company, or through a virtual streaming provider (like YouTube TV, Hulu+Live TV, DirecTV Stream)? Of those that have a personal device.