


Report on the Streaming Landscape and CTV Consumption Trends

 comscore

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AGENDA

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**Streaming
Landscape &
Consumption
Trends**

2

**The Age of
Ad-Supported
Streaming**

3

**More than
Media
Planning**

4

**Canadian
Market**

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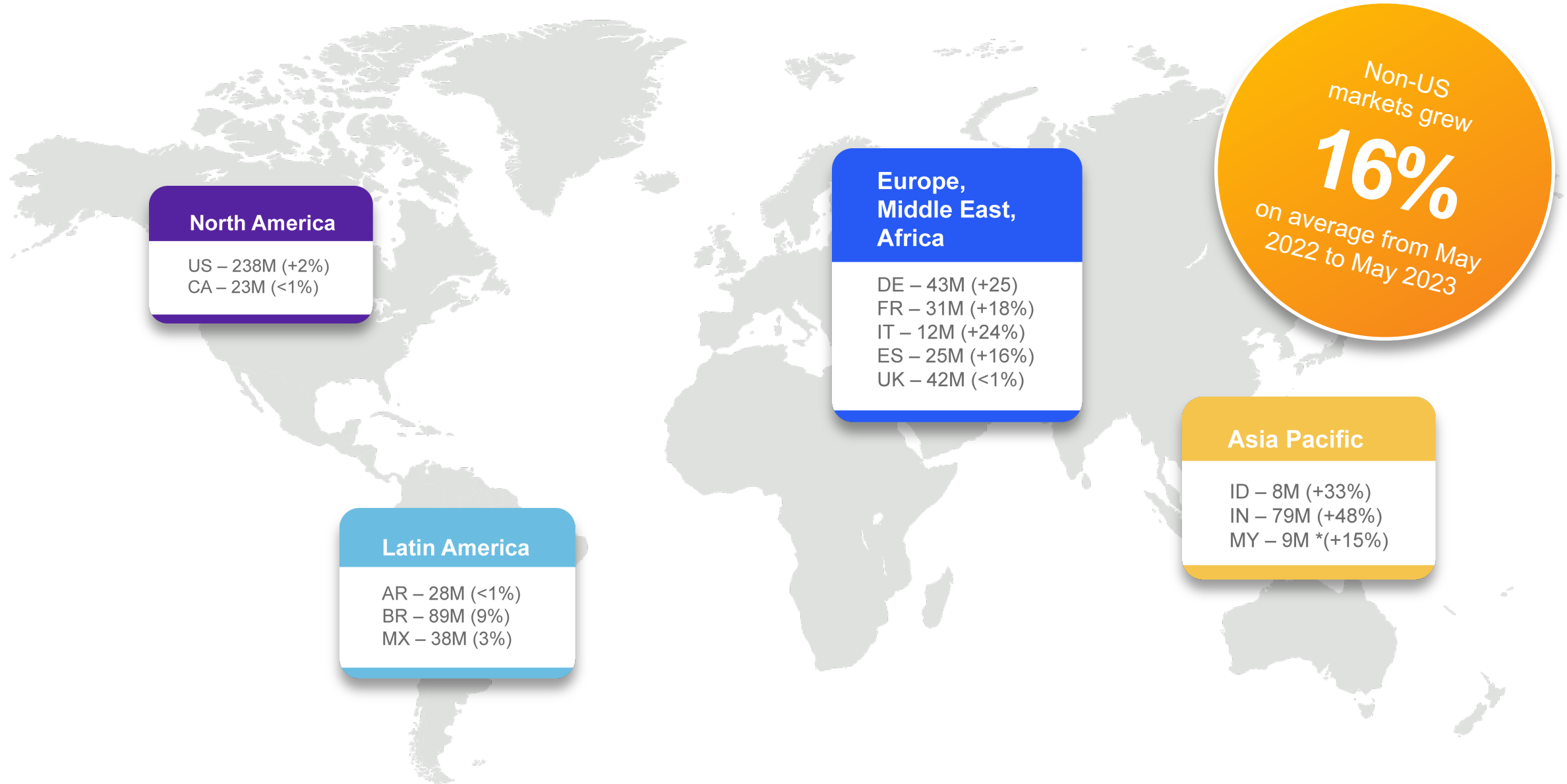
**Key
Takeaways**

SECTION ONE

Global Streaming Landscape & Consumption Trends



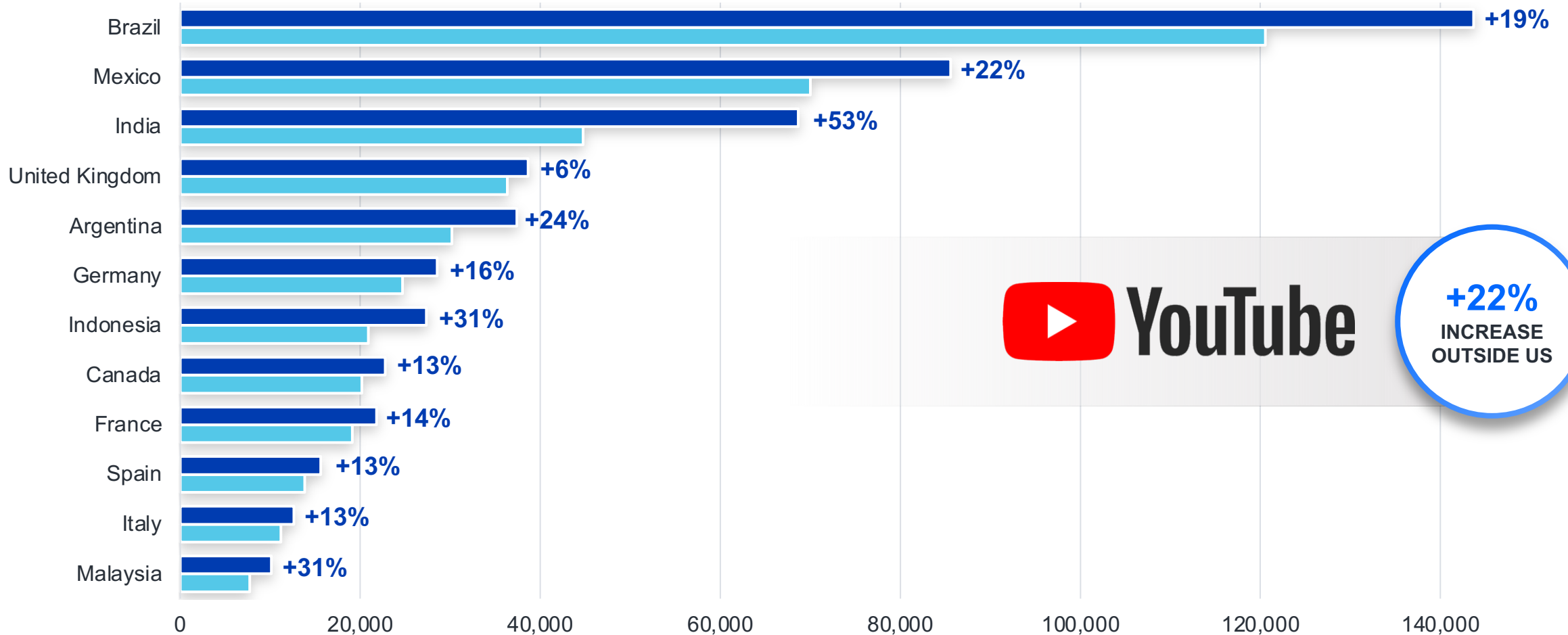
CTV USAGE IS EXPANDING GLOBALLY



INCREASED GLOBAL CTV ENGAGEMENT DEMONSTRATES SIGNIFICANT AUDIENCE GROWTH POTENTIAL EVEN FOR HIGH REACH SERVICES

YOUTUBE CTV TOTAL DEVICE MINUTES (IN MILLIONS)

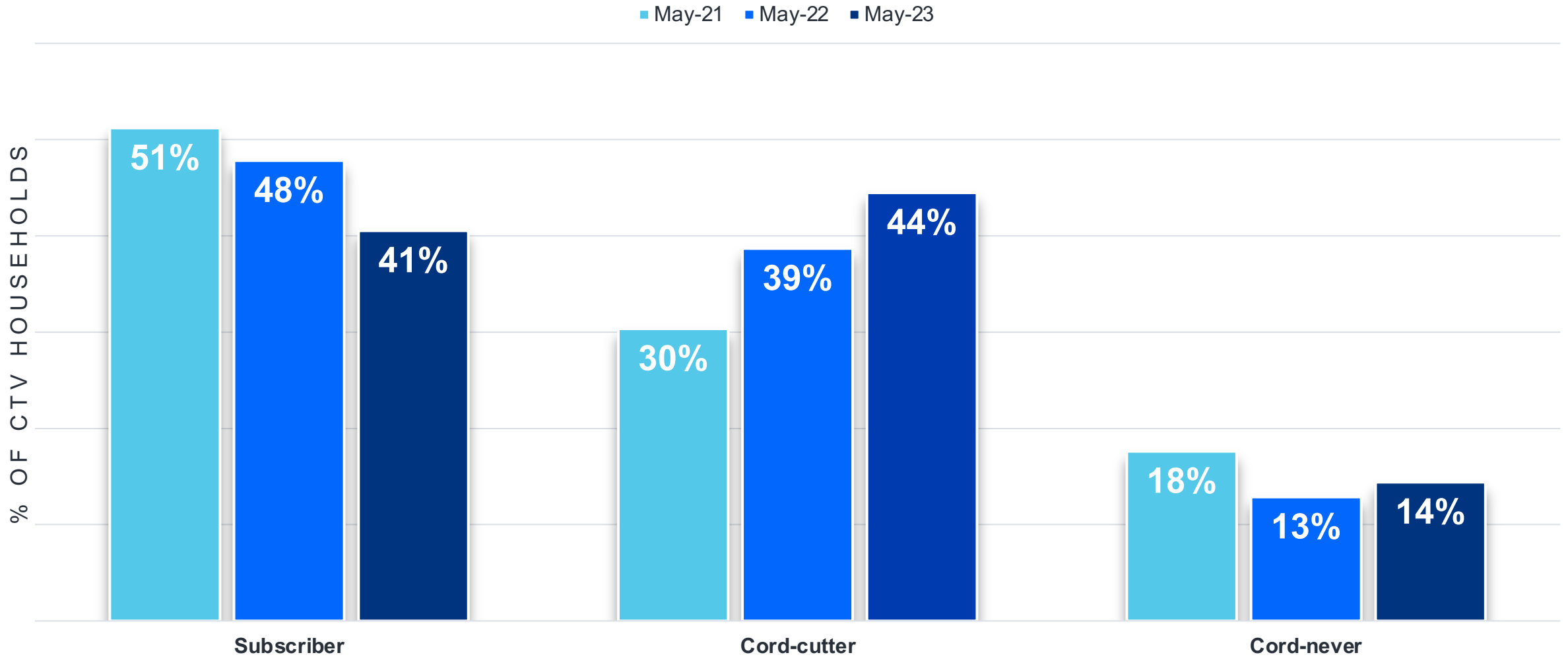
■ May 2023 ■ May 2022



+22%
INCREASE
OUTSIDE US

CORD-CUTTERS HAVE ECLIPSED TRADITIONAL TV SUBSCRIBERS

Nearly 60% of CTV HHs are now Cordless



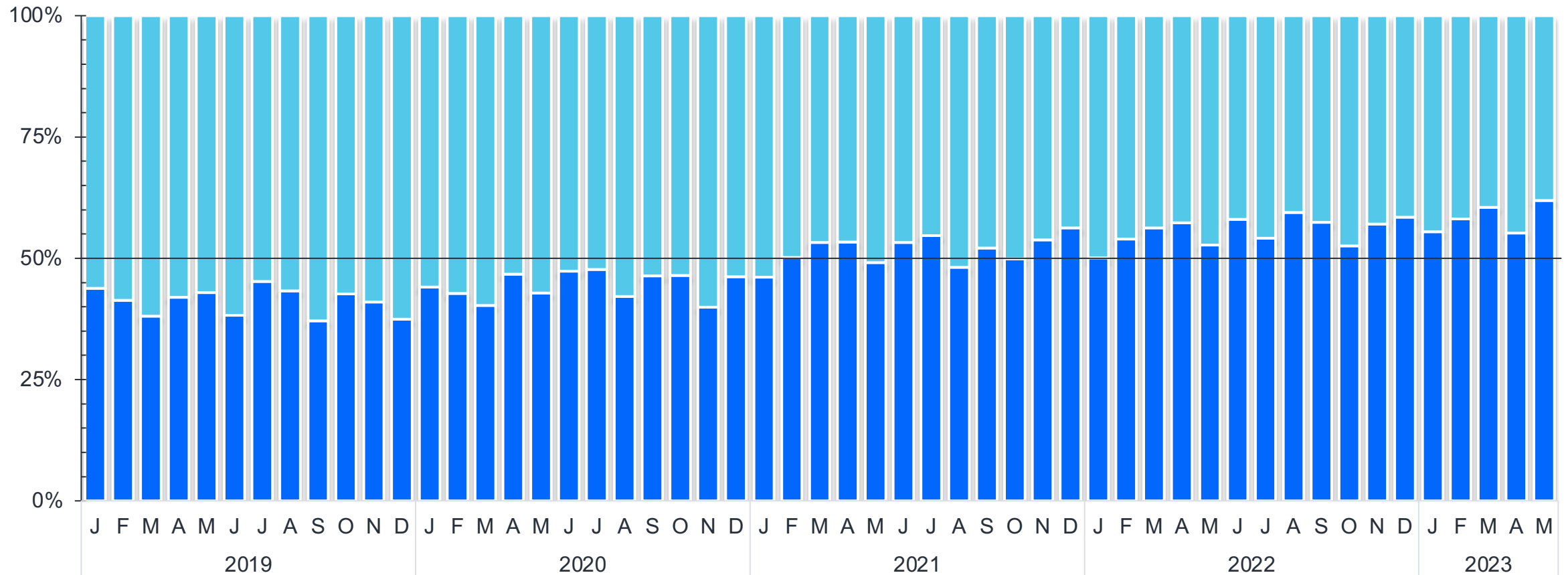
POST PANDEMIC SHIFT TO DIGITAL



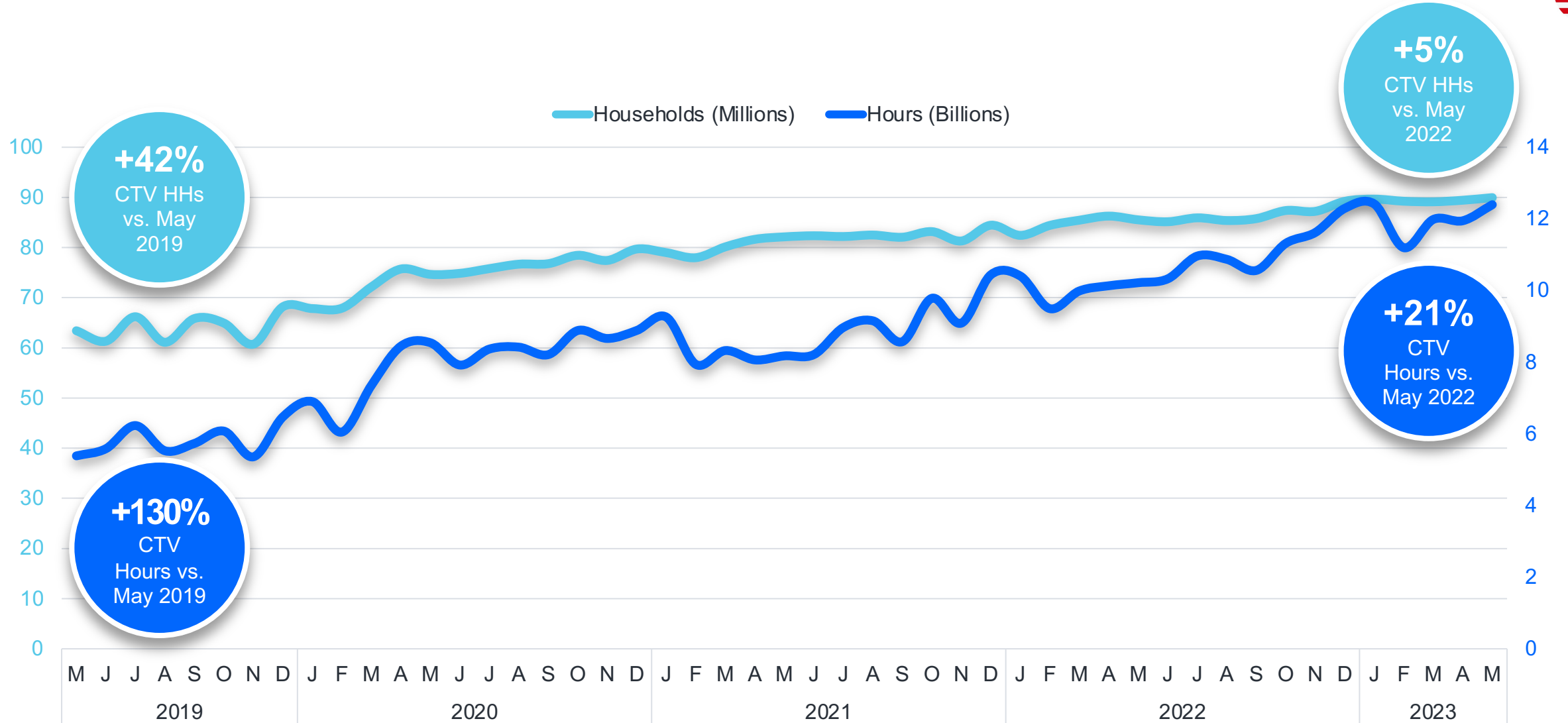
As the world began to emerge from the pandemic, production studios began filming shows & series again and more streaming services began to spring up. The data marks a pivotal milestone of Digital/CTV passing 50% of total hours consumed in viewership even as linear holds its ground

SHARE OF TOTAL HOURS WATCHED

LINEAR DIGITAL & CTV



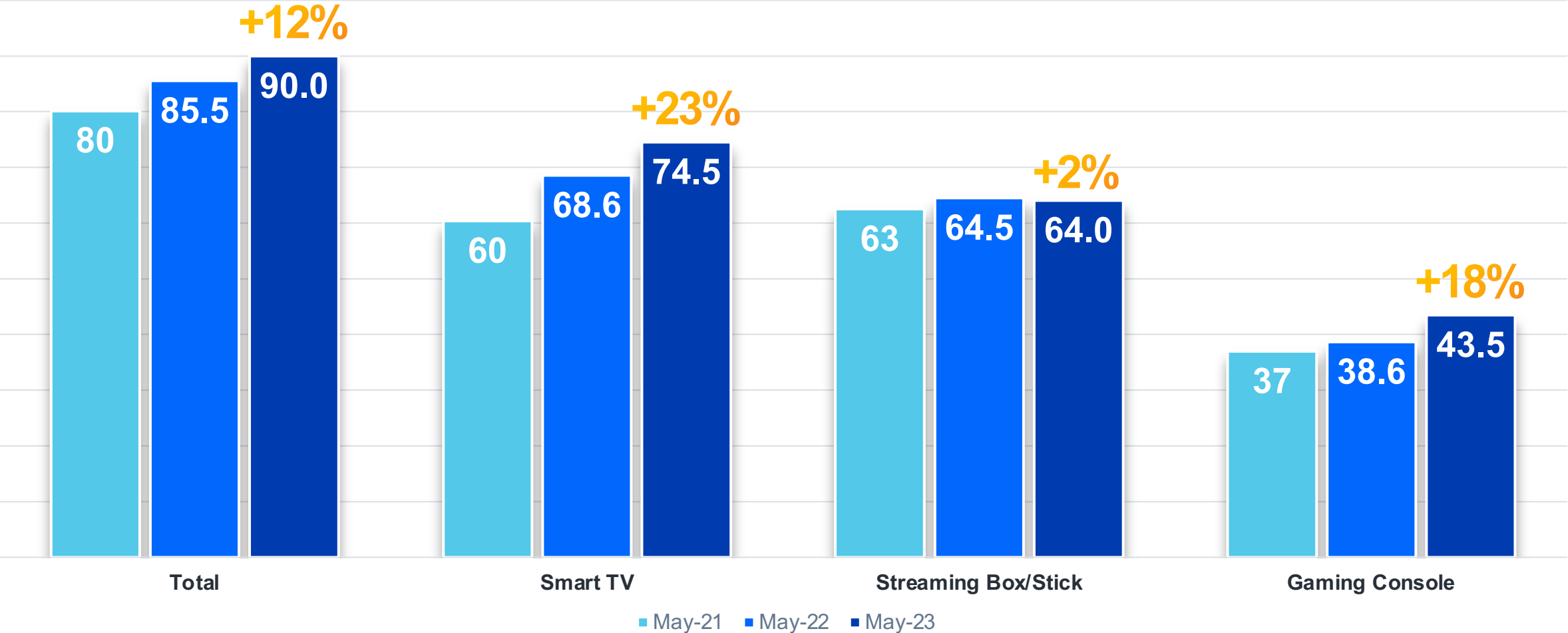
STREAMING ON CONNECTED TV DEVICES CONTINUES GROWING



SMART TVS HAVE BECOME THE DOMINANT DEVICE FOR CTV STREAMING



TOTAL HOUSEHOLDS (IN MILLIONS) THAT STREAM CONTENT • % INCREASE FROM MAY 2021 TO MAY 2023



STREAMING SERVICES CONTINUE TO COME TO THE MARKET,
AND HOUSEHOLDS ARE TRYING NEW SERVICES OUTSIDE **THE** TOP 6



STREAMING SERVICES WATCHED PER HOUSEHOLD



MAY 2019

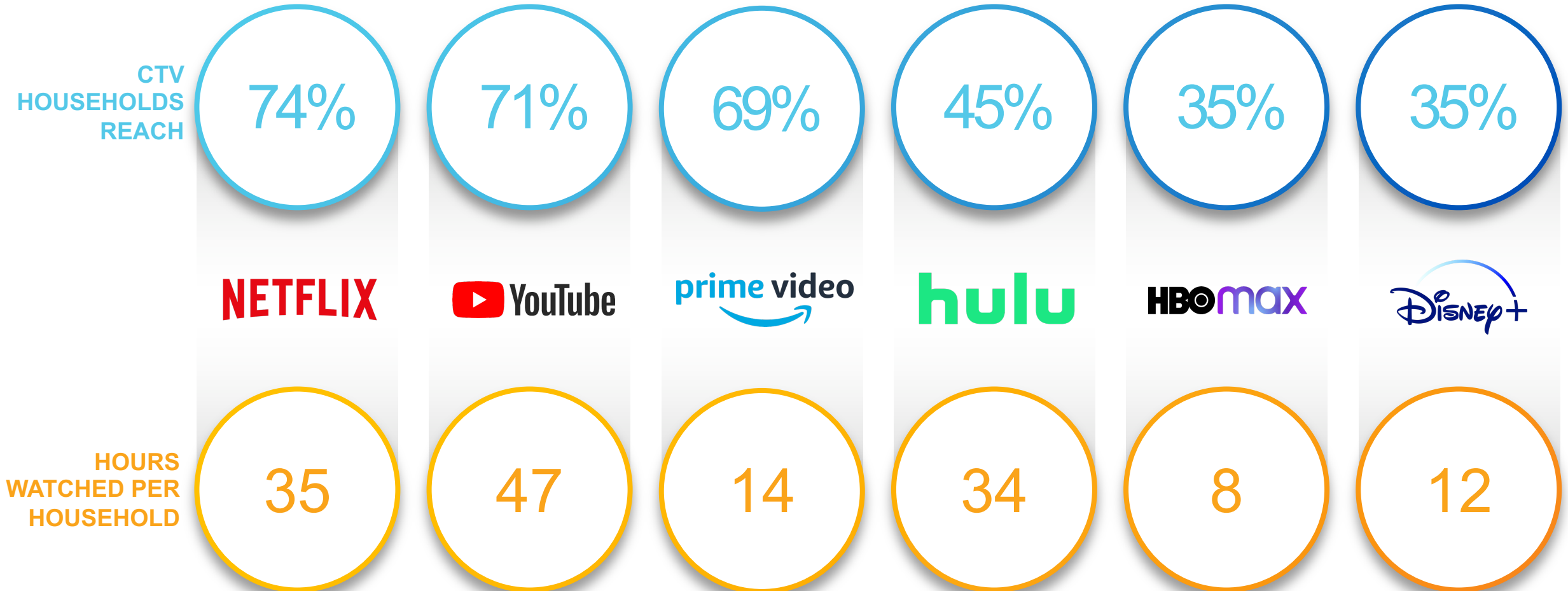


MAY 2021



MAY 2023

THE TOP 6 SERVICES ARE STREAMED IN AT LEAST 1 IN 3 CTV HOUSEHOLDS





SECTION TWO

The Age of Ad-Supported Streaming

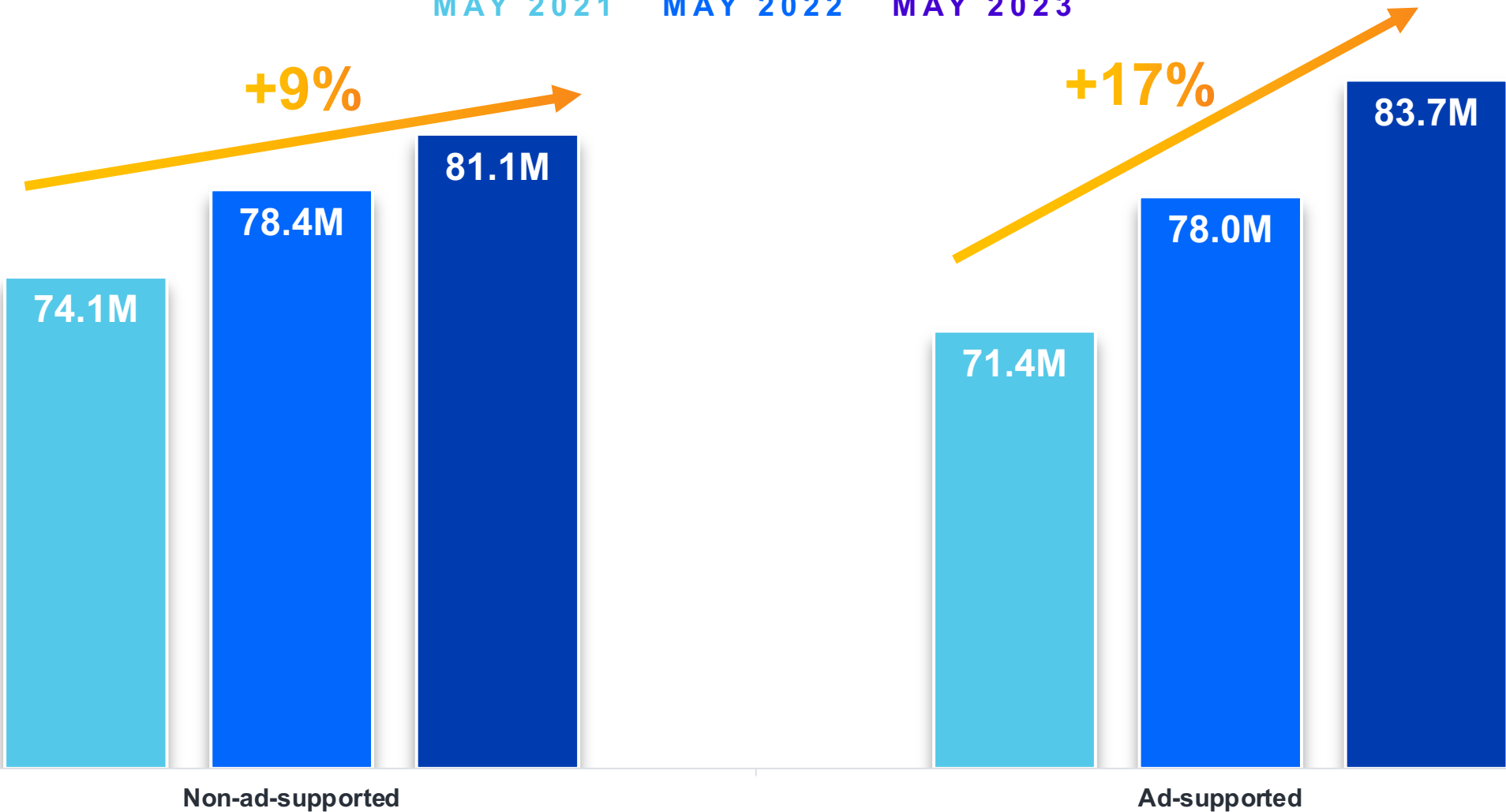


AMERICANS ARE ADOPTING AD-SUPPORTED STREAMING SERVICES AT A FASTER RATE THAN NON-AD SUBSCRIPTION-BASED SERVICES



CTV HOUSEHOLDS STREAMING NON-AD-SUPPORTED VS. AD-SUPPORTED SERVICES

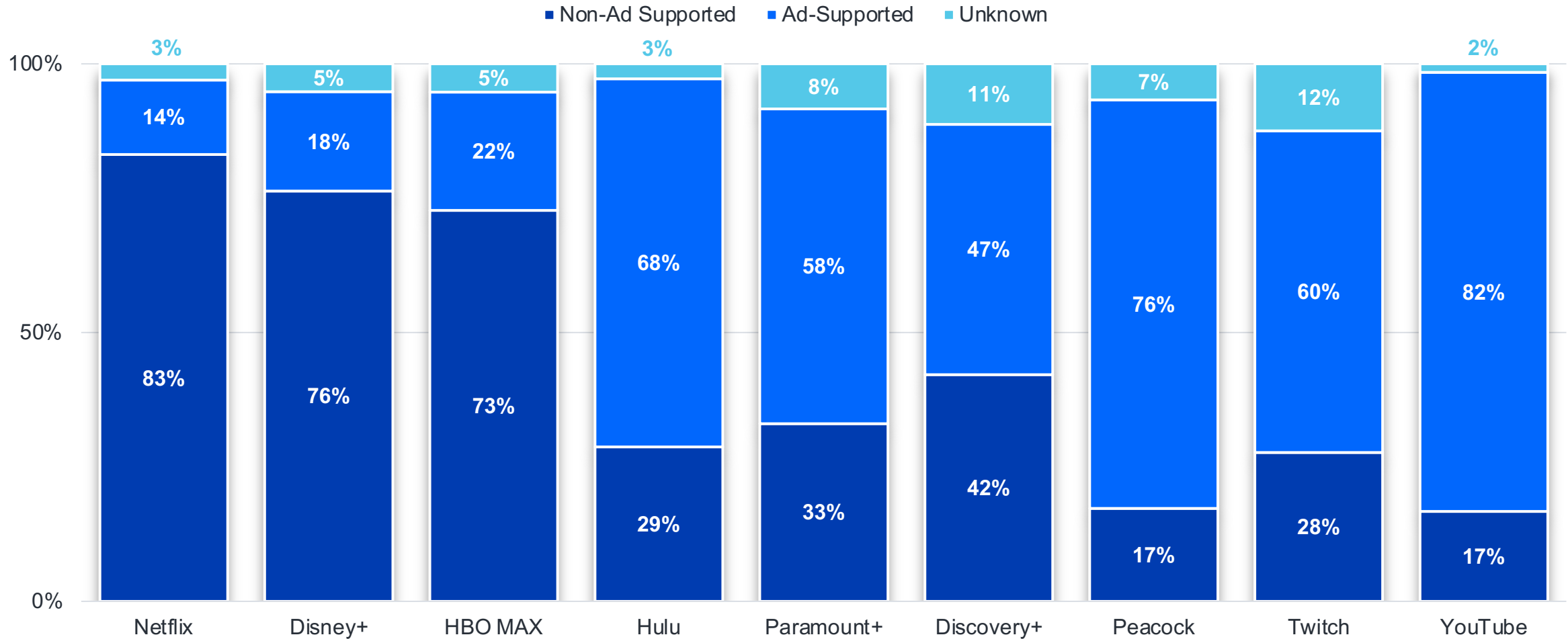
MAY 2021 MAY 2022 MAY 2023



CONSUMERS ARE RESPONDING TO AD-SUPPORTED TIER AVAILABILITY



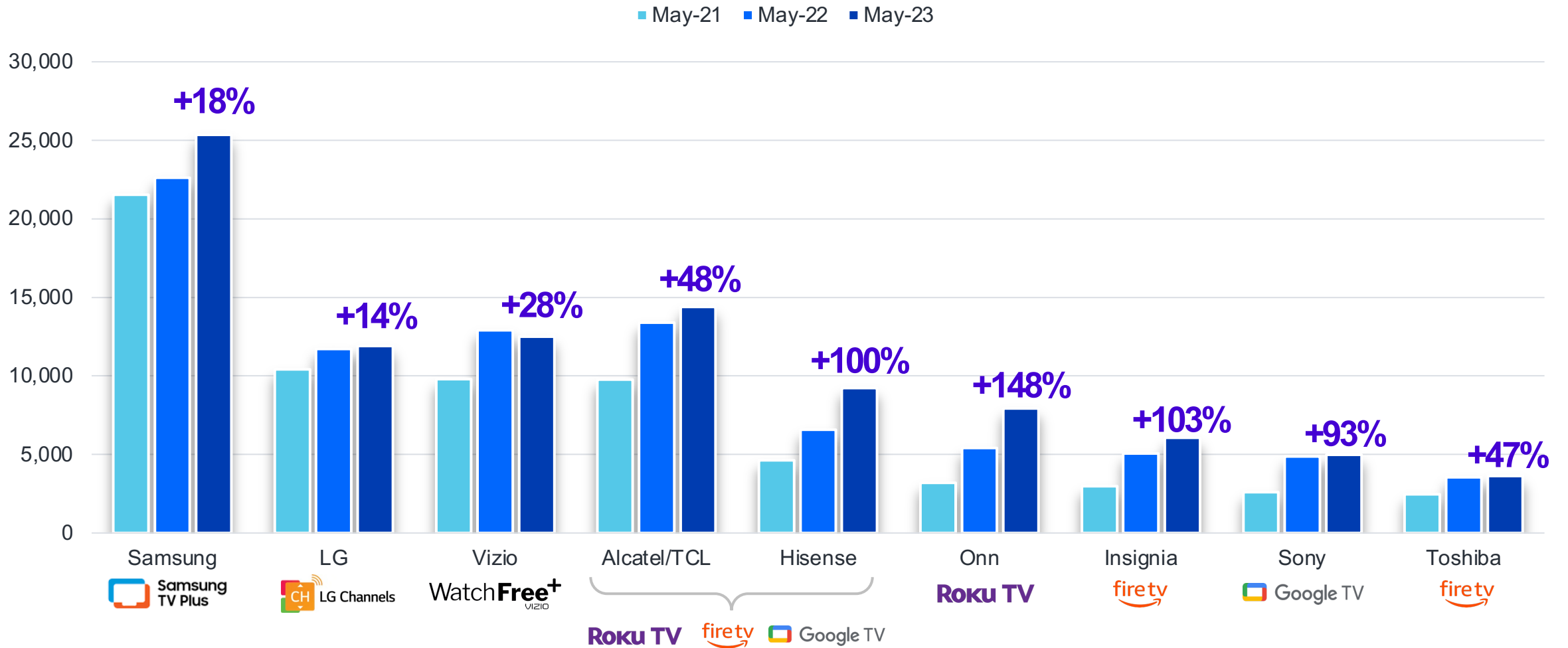
CTV HOUSEHOLDS STREAMING NON-AD-SUPPORTED VS. AD-SUPPORTED TIERS



SMART TV OEMs HAVE LEVERAGED INTEGRATED FAST CHANNELS/EXPANDED APP COMPATABILITY TO BUILD EXTENDED AD-SUPPORTED REVENUE BUSINESSES



WIFI HOUSEHOLDS (IN MILLIONS) USING SMART TV BRAND IN U.S.





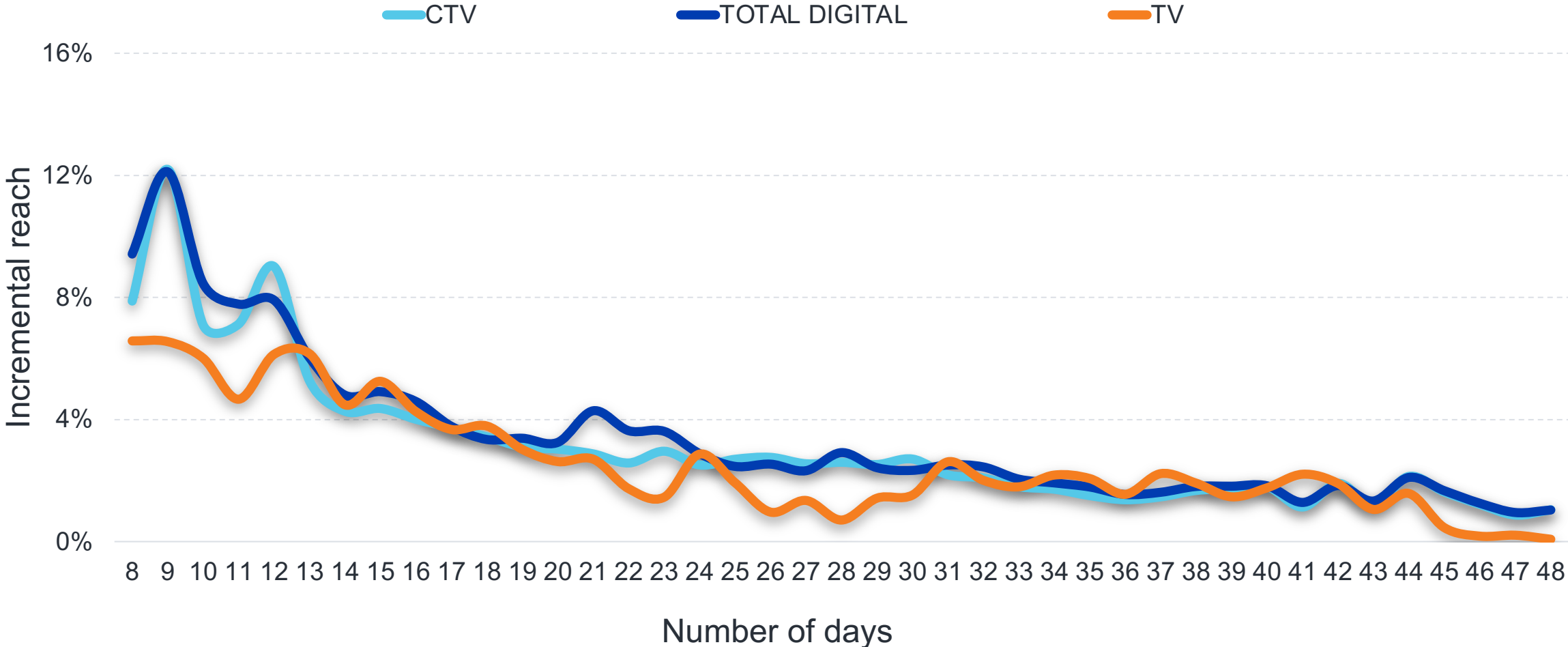
SECTION THREE

More than Media Planning

THE LONG VIEW OF INCREMENTAL LIFT ACROSS PLATFORMS



DAILY INCREMENTAL REACH FOR DAYS 8-48 (2-6 WEEKS VIEW), BY PLATFORM



OPTIMAL PLATFORM MIX DEPENDS ON THE TARGET AUDIENCE



Average Aided Awareness lift increases when adding platforms



TV

TV + DIGITAL

TV + DIGITAL + CTV

18 TO 24

6.0

15.8

17.4

TOTAL POP

2.4

4.1

6.3



SECTION FOUR

Canadian Market

Due to the nature of the data presented, there are some restrictions to what we can share. For additional slides and more details on the Canadian Market, please contact your Comscore Account representative or Paul Rich (prich@comscore.com).

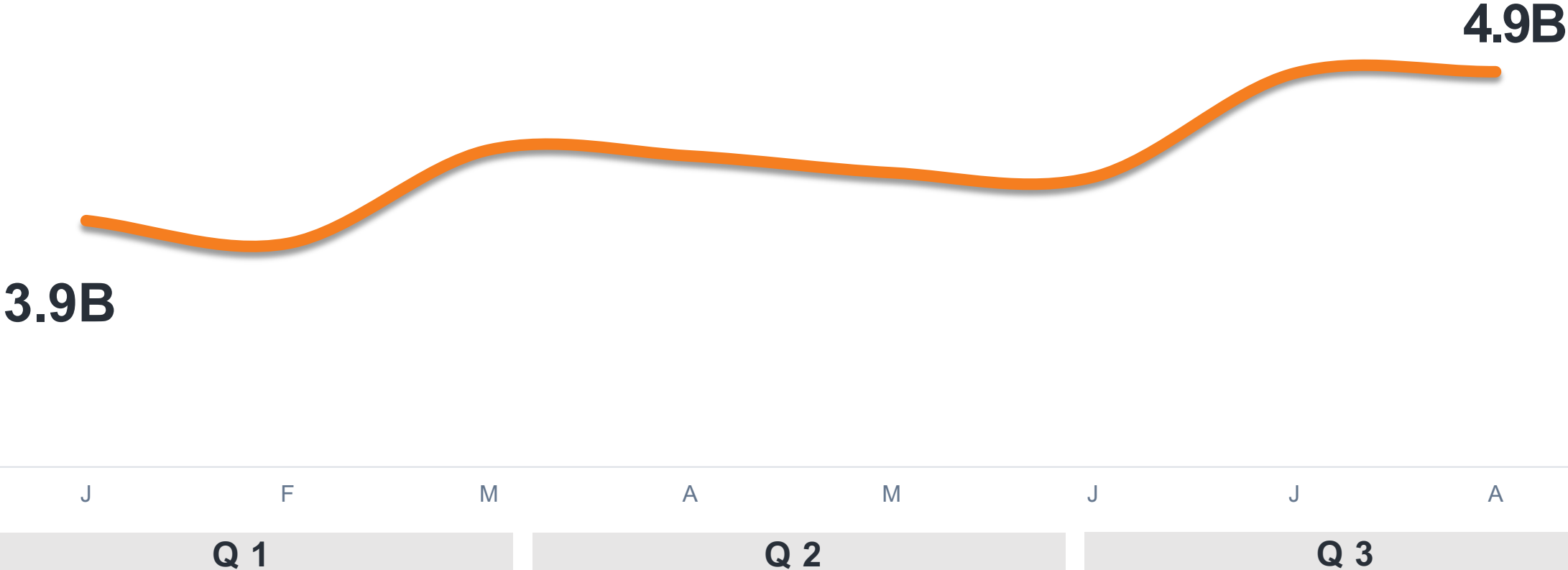
Thank-you for your understanding.

CANADIAN VIDEO VIEWING HABITS

VIDEO CONSUMPTION ON CONNECTED TV CONTINUES TO GROW



VIDEOS CONSUMED ON CTV IN 2023





Key Takeaways



KEY TAKEAWAYS

1

CTV usage has continued to grow globally and beyond just the top services

2

Ad-Supported services are surging which allows for brands to expand reach

3

Canada: CTV & Video consumption increases providing environment to optimize advertising & revenue outcomes



**Thank
you!**

Paul Rich

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