

VIDEOELEPHANT PRESENTS

WHY FAST MATTERS



WORKING WITH HUB ENTERTAINMENT RESEARCH

Hub specializes in video & understanding how people.

Hub works for leading networks, pay TV operators, content creators, agencies, and tech companies



dish

WB
WARNER BROS.
DISCOVERY

Paramount



AT&T

LG

amazon

NETFLIX

hulu

FOX

Disney+

CBS

SONY
PICTURES

COX

COMCAST
NBCUNIVERSAL

OMG
OmniconMediaGroup

WHERE WE GOT THIS DATA

FROM 2024 HUB STUDIES INCLUDING:

- Decoding the Default
- TV Advertising: Fast vs. Fiction
- TV Churn Tracker
- Monetization of Video
- Evolution of Video Branding

FROM A SET OF PROPRIETARY VIDEOPHANT QUESTIONS

- 1,600 TV consumers, age 16-74
- Fielded in October 2024

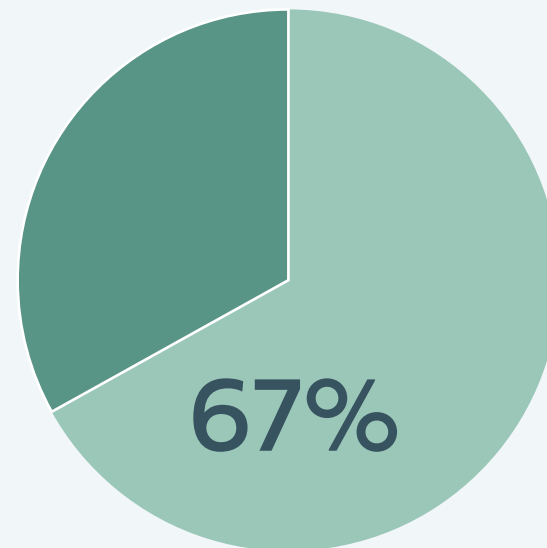
Hub conducts about 100,000 interviews per year with video consumers



FAST CONTENT IS BECOMING THE NORM

Free ad-supported tv is the norm: two-thirds have used at least one (up from 55% in 2021)

TV CHURN 2Q24
BASE: TOTAL RESPONDENTS APR-JUN 2024 (n=6159)
Q3d. Here are free online services that allow you to watch shows and movies with ads. Which ones do you ever use to watch, if any?



of viewers say they have used at least one free-with-ads platform

...BUT THEY ARE WIDELY DISTRIBUTED

Your content needs to be in
multiple places to be found

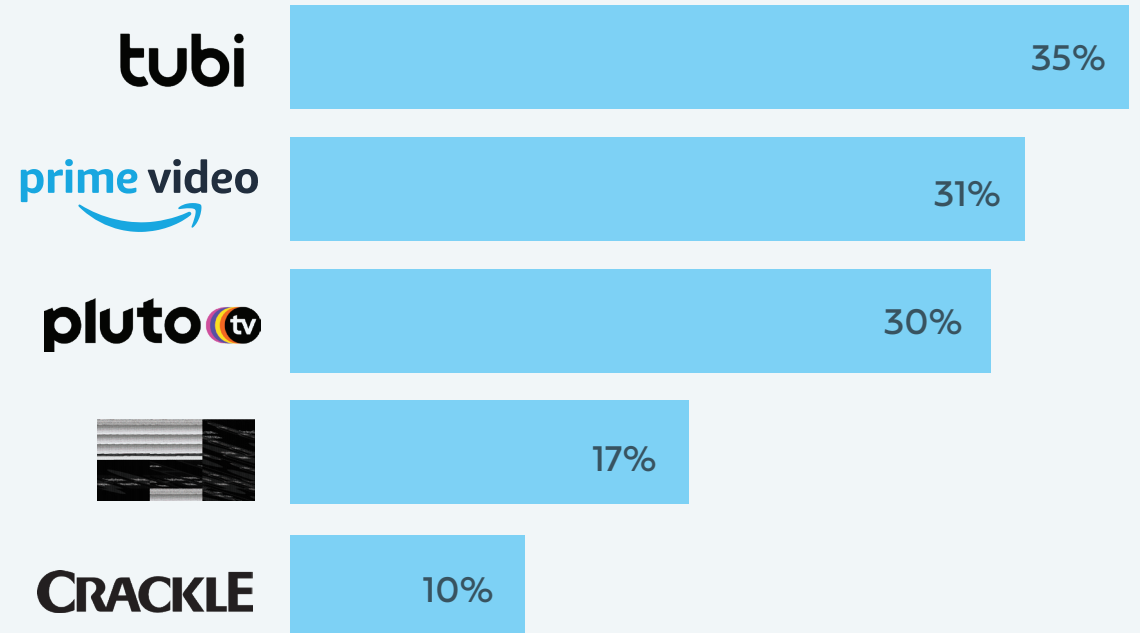
EVOLUTION OF THE TV SET

BASE: (n=2,453)

Q11m. Think about when you first turn on [PRIMARY TV SET].

As best as you recall, which of these do you usually see?

% who report using specific FASTs:



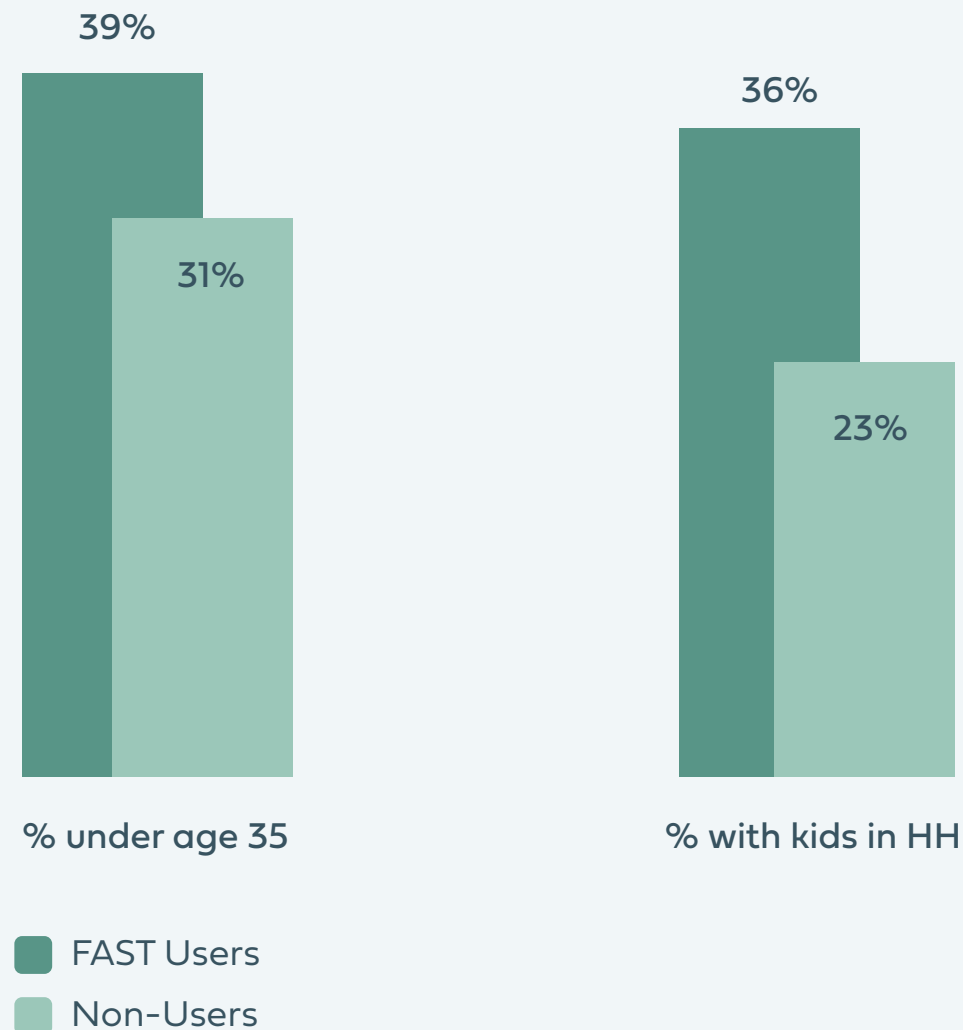
FAST ATTRACTS A VALUABLE AUDIENCE

WHO WATCHES FAST?

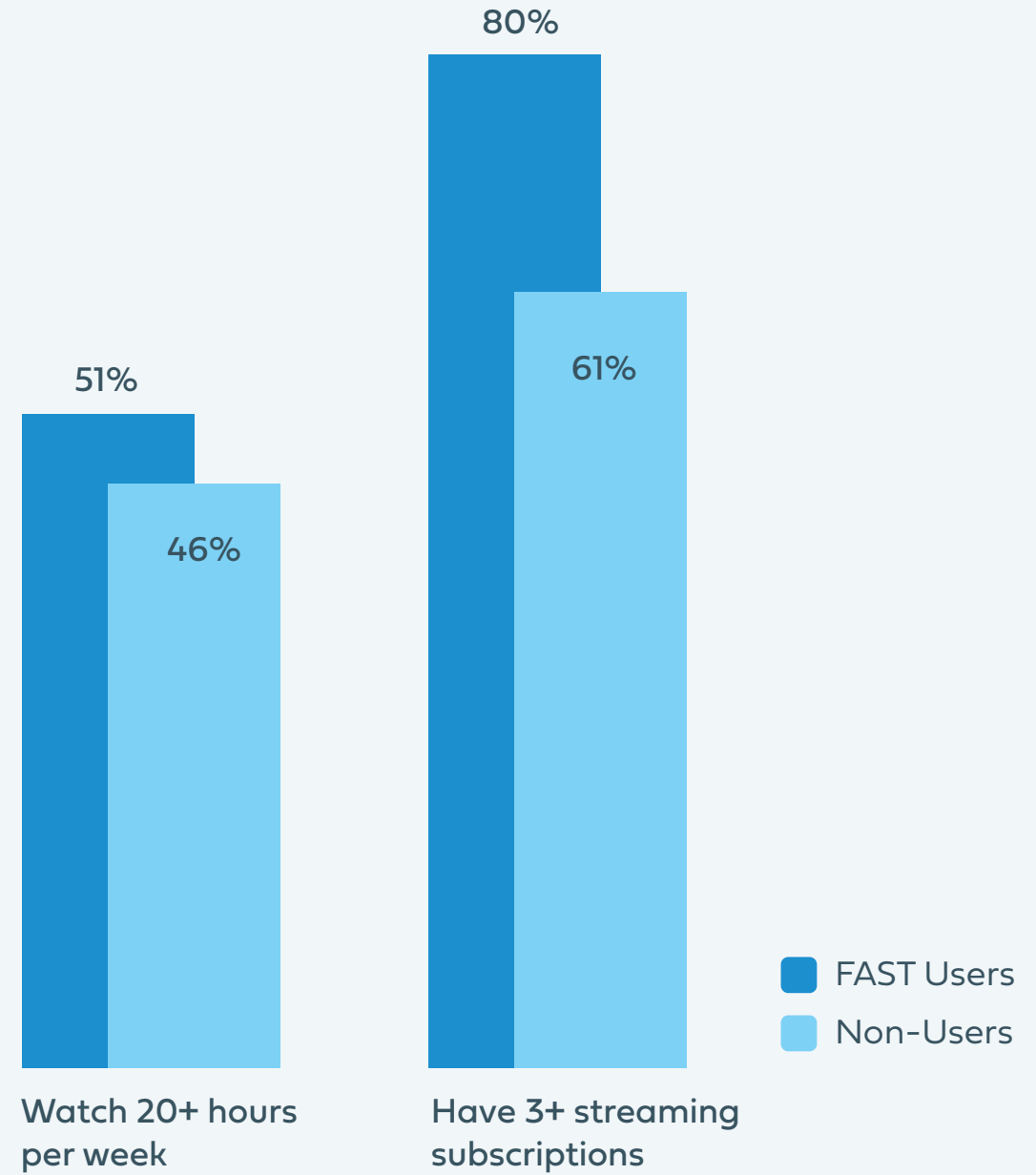
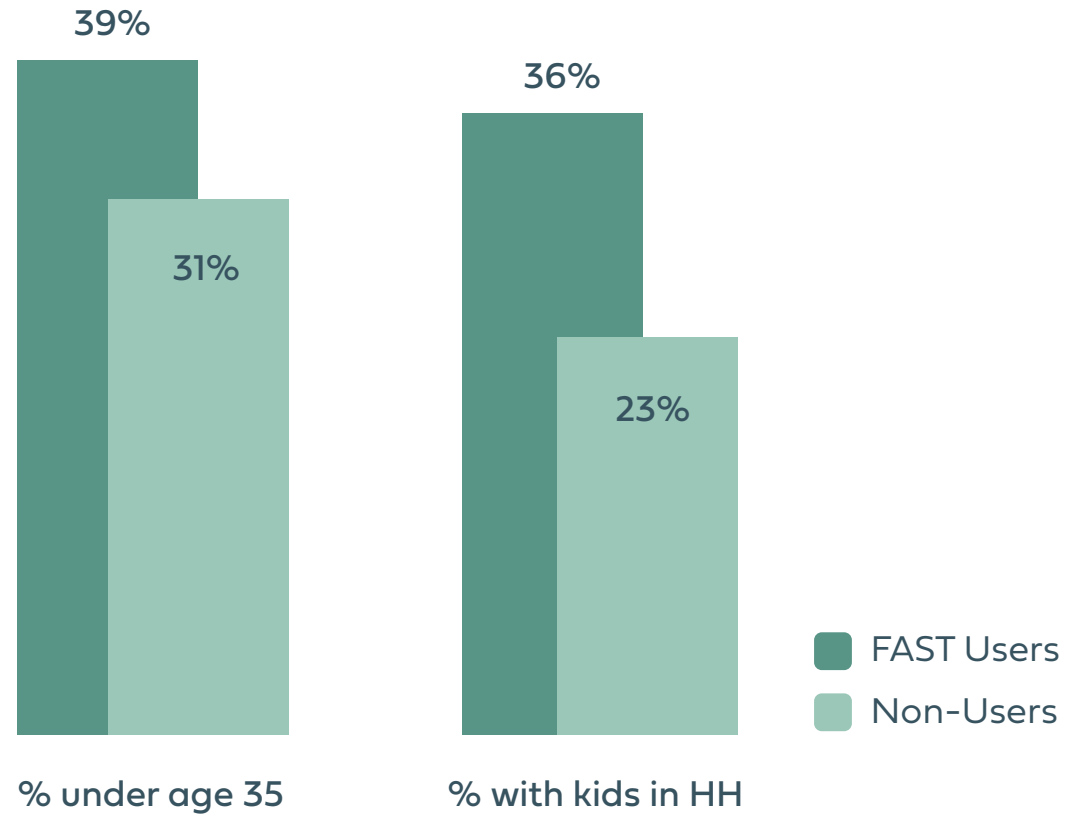
Many assume that FAST viewers are less engaged with TV, and don't want to spend on content.

But that's not the case.

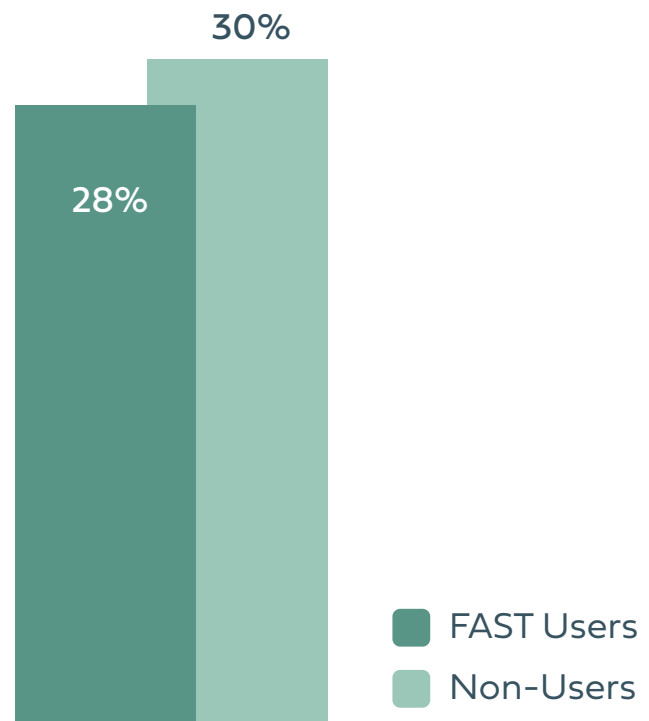
FAST users come from desirable demos



FAST USERS COME FROM DESIRABLE DEMOS



FAST USERS COME FROM DESIRABLE DEMOS

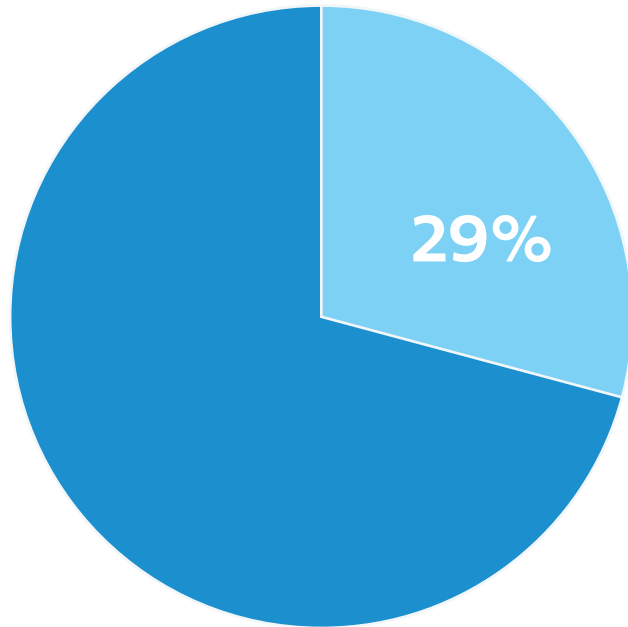


Spend at least \$100 per month on TV



AS FASTS PROLIFERATE (AND COSTS RISE), SOME VIEWERS ARE SUBSTITUTING FAST FOR PAID PLATFORMS

Have you dropped a TV subscription because you use FAST?



YES

Which service did you drop?

SVOD
71%

VMVPD
34%

MVPD
33%

CONQUERING CONTENT 2024

BASE: FAST USERS 2024 (n=1,053)

Q6: Have you dropped subscriptions to any TV services because you use free TV streaming services like [FAST SERVICE USED]?

CONQUERING CONTENT 2023

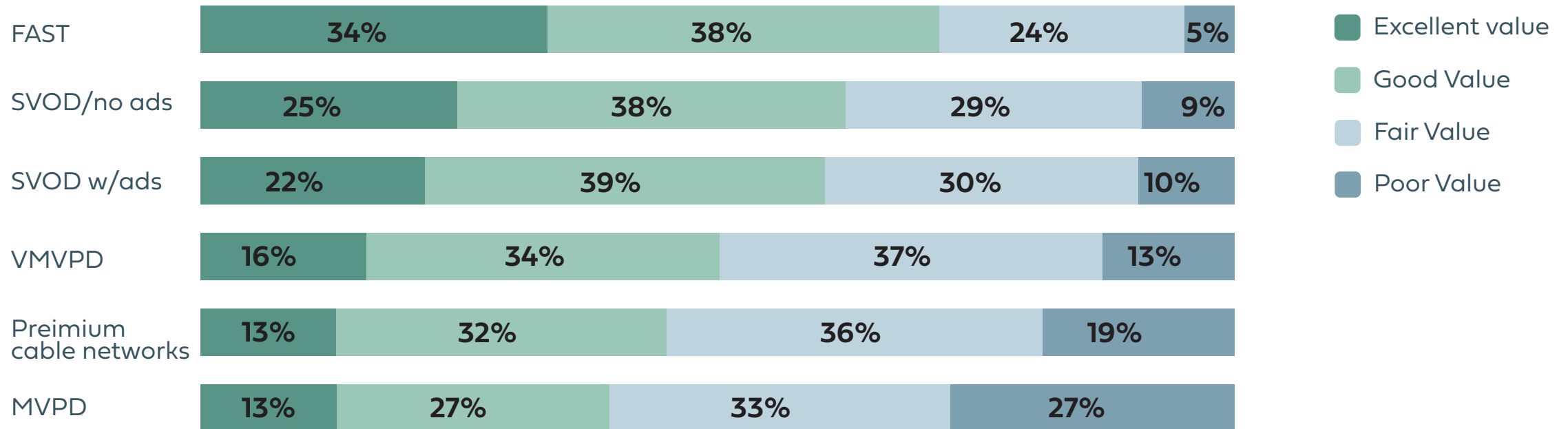
BASE: DROPPED A SUBSCRIPTION DUE TO FAST USE (n=322)

Q6w: Which TV subscription services have you dropped because you use free TV streaming services?

FAST PLATFORMS DELIVER MORE VALUE THAN ANY OTHER KIND OF TV PLATFORM

How much value do you associate with each of the following?

Among all respondents



TV ADVERTISING: FACTS VS. FICTION JUNE 2024

BASE: DURING RECENT VIEWING EXPERIENCE, SHOW INCLUDED ADS OR PROMOTIONS: FAST (n=127); AVOD (n=1,271); VMVPD (n=359); MVPD (n=334)




Q9j. How did you feel about the number of ads and promotions during the show?

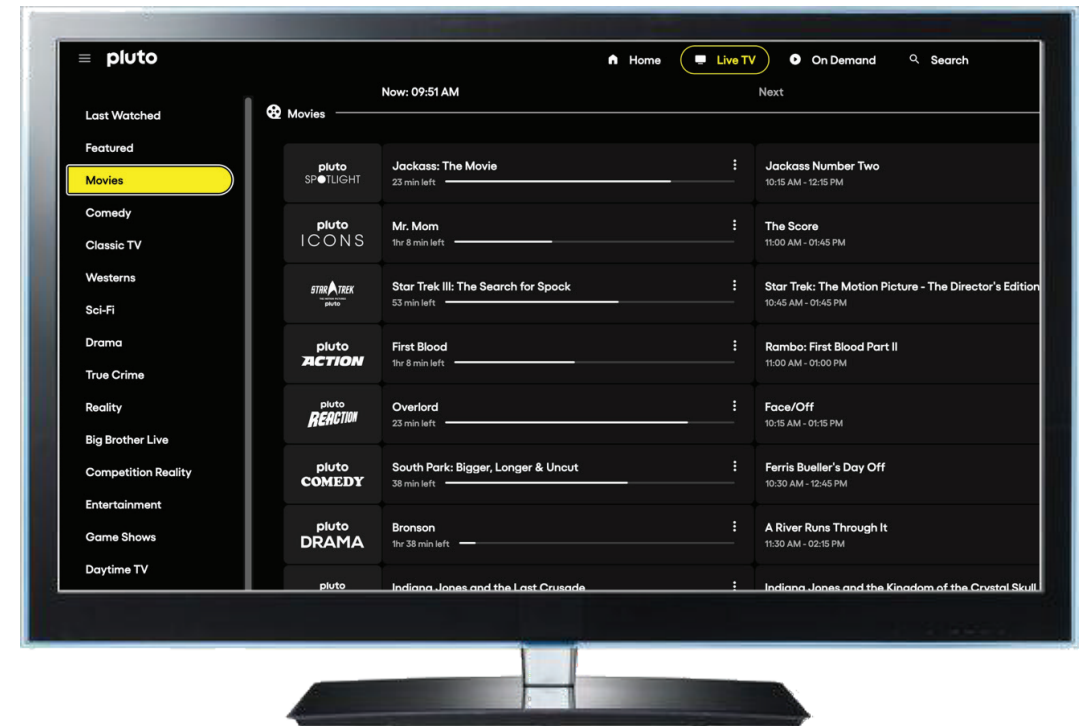


IN FACT, 41% SAY IT'S EASIER TO FIND SOMETHING TO WATCH ON FASTS THAN OTHER PLATFORMS

Is it easier or harder to find something you want to watch on FAST channels than other platforms?



 Easier than other platforms  The same  Harder than others



CONQUERING CONTENT 2024

BASE: TOTAL RESPONDENTS WHO USE FAST (Pluto, Roku Channel, Freevee, Crackle, Tubi) (n=1,032)

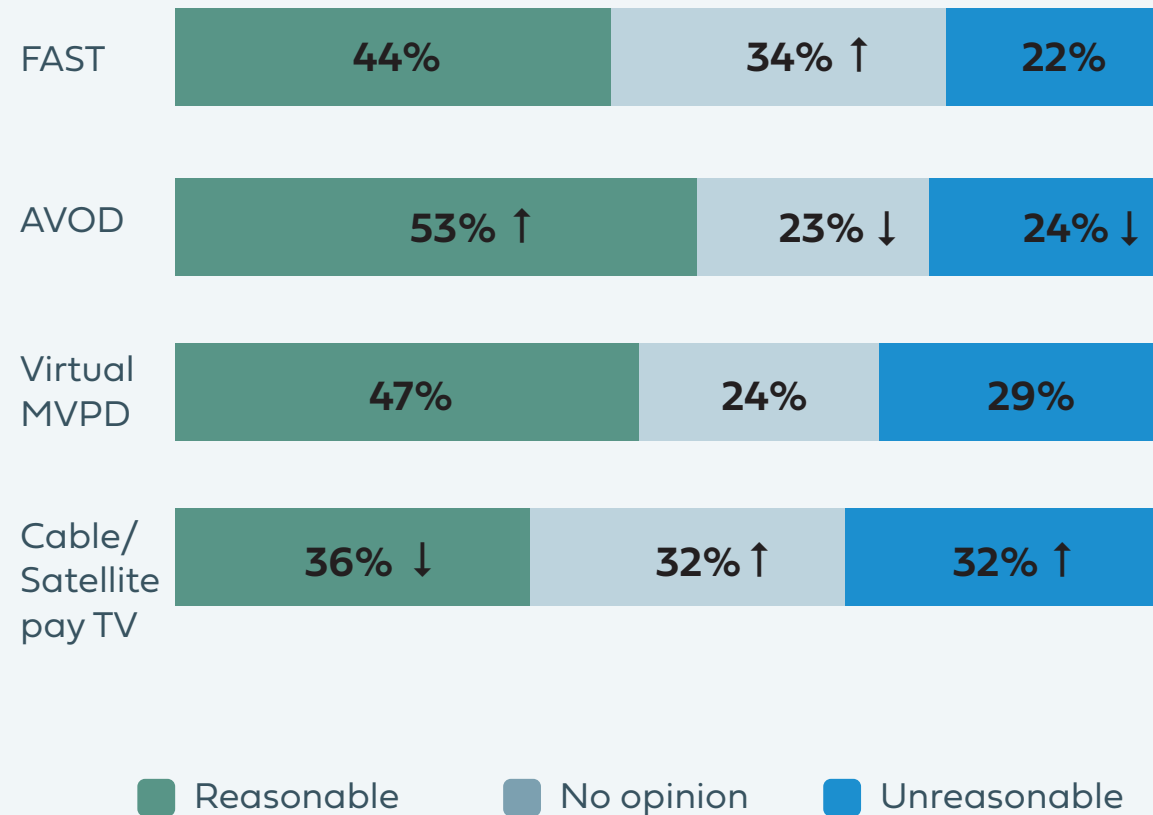
6f2. Here are some of the different TV services you have. For each, tell us if it's easier or harder to find something you want to watch on the service compared with other services (Somewhat easier + a lot easier)

FASTS ARE A SUPERIOR VEHICLE FOR ADS

Less than a quarter of fast users said the ad load was “unreasonable” – lowest of all platforms

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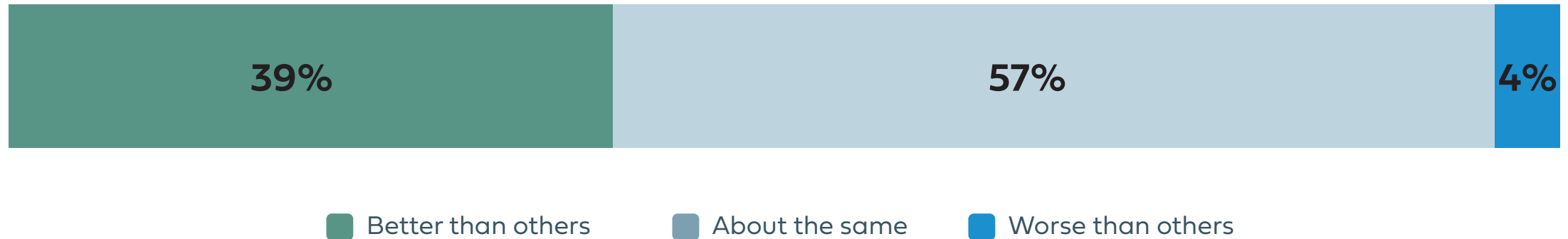
How do you feel about the total number of ads & promotions during the show?



39% OF FAST USERS SAY THE AD EXPERIENCE IS BETTER THAN OTHER PLATFORMS. ONLY 4% SAY IT'S WORSE

Think about the way ads were handled during the show - the number of ads, how long the ad breaks were, how relevant they were to you, etc.

Overall, would you say the ad experience was better or worse than other TV platforms with ads?

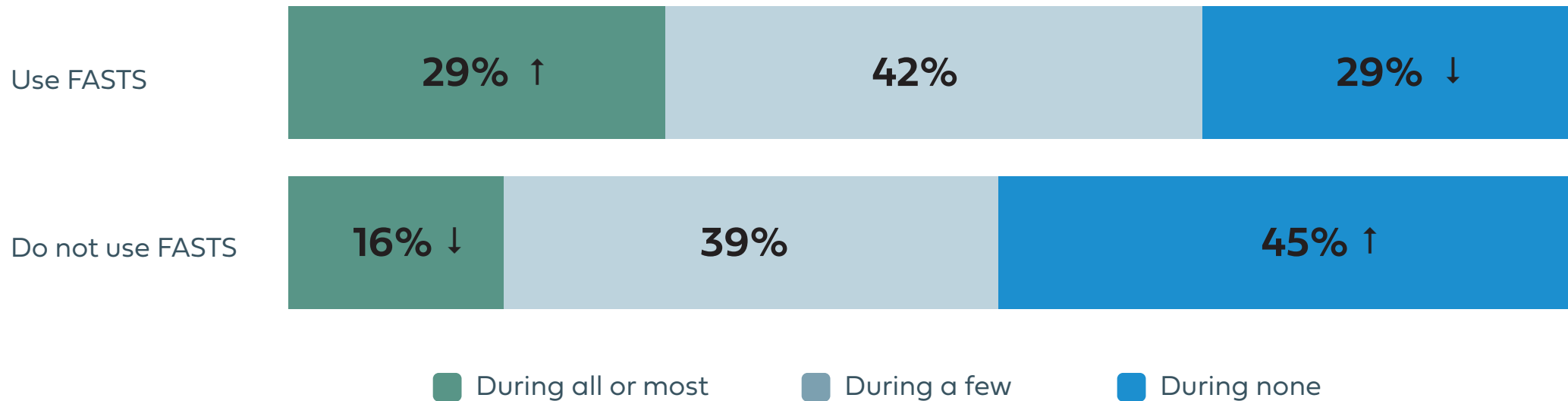


↑ = significantly higher than those not in comparison group

Q9g1. Think about the way ads or promotions were handled during this show—the number of ads, how long the ad breaks were, how relevant the ads or promotions were for you personally, etc. Overall, would you say that the way ads were handled was...

FAST VIEWERS ARE MORE LIKELY TO PAY ATTENTION TO ADS THAT PLAY DURING THE SHOWS THEY WATCH

How often do you pay attention to the ads and promotions?



↑ = significantly higher than those not in comparison group

TV ADVERTISING: FACTS VS. FICTION JUNE 2024

BASE: DURING RECENT VIEWING EXPERIENCE, SHOW INCLUDED ADS OR PROMOTIONS: FAST USERS (n=1,608); FAST NON-USERS (n=649)

Q9o. While the ads or promotions were on, how often did you do any of the following?

THANK YOU

—
QUESTIONS?

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