



## TVE Tracking Study – Wave 7 - Notable Highlights:

### TVE Usage:

***TVE use has increased significantly across major subgroups. Overall, month-to-month use tends to fluctuate although more so among Millennials. SVOD use and TVE use are not mutually exclusive -- there's a lot of cross over between them.***

- Nearly 6 in 10 MVPD subscribers (56%) and Cable subscribers (57%) report using TVE on a monthly basis
- Roughly one third (32%) of both groups report being heavy users, or using TVE once a day or several times a week.
- Monthly usage among MVPD subscribers A18-64 has seen substantial increases across demographic groups since the last wave of the study. Keep in mind that, unlike past waves of the study, this wave the definition of TVE use did not include mention of having to authenticate. That said, monthly usage among Millennials increased from 52% to a whopping 75%, Gen Xer usage increased to 55% (from 41%) and Boomer usage increased to 46% (vs. 36% last wave).
- Monthly usage is even higher among MVPD subscribers A18-74 who are Hispanic at 82% (up from 55% last wave) and African American at 71% (vs. 59%).
- Further, three-quarters (76%) of Hispanic MVPD subscribers report that access to TVE increases their perception of the value you get from their service provider for the cost of subscription. Over 6 in 10 (63%) of African American subscribers report the same sentiment.
- Overall, month to month usage among MVPD subscribers continues to fluctuate, peaking in late spring/early summer and increasing again in August and September.
- Millennial MVPD subscribers' use of TVE tends to vary more significantly from month to month with usage peaking in May/June (86%) and then again in July/August (78%). While not as high as Millennials, TVE use among older MVPD subscribers A35-64 is more stable from month to month.

- The data also show that SVOD users are significantly more likely than non-SVOD users to also use TVE. Seventy-three percent of Netflix subscribers report using TVE in the past six months, with 80% of Hulu and 77% of Amazon Prime subscribers reporting the same vs. only 42% of those who do not subscribe to these services.
- Looking at **monthly TVE users** A18-64, the data show that 75% report also using Netflix, with 45% using Amazon Prime and 25% using Hulu.

### **Path to Viewing:**

***Currently MVPD sites/apps are the go to destination for TVE users whether or not they have a particular program in mind to watch.***

- MVPD subscribers A18-64 report that when they use TVE they're more than twice as likely to be looking for a specific show they want to view rather than browsing with nothing particular in mind (68% vs. 32% respectively).
- Those who do have a particular program in mind report being more likely to go to their MVPD site/app (47%). Of those who do, the majority search for the show by name using the search bar (61%).
- Provider sites/apps are also the preferred destination when users do not have a particular program in mind (48%). When this is the case, consumers report being a little more likely to browse across networks vs. by individual network (56% vs. 46%)

### **Most Recent Use of TVE:**

***The majority of TVE users successfully found what they wanted and found the process of using TVE to be easy.***

- When asked about the last time they used TVE, 71% of MVPD subscribers A18-64 reported that they were looking for a specific show. Seventy-eight percent were able to find it. Two-thirds (67%) ended up watching a show via TVE.
- Top reasons for not watching a show via TVE on the last time they used it were that they changed their mind (32%) and it wasn't available (21%).
- The majority (61%) found the process of using TVE to be easy with only 14% reporting that they found it difficult to use.

### **TVE Occasions:**

***Usage of live streaming via TVE is growing and it's making an impact. As expected TVE users site the premiere sporting events as those they'd be most likely to view via TVE. Users are grabbing a bite with TVE and finding it to be as good or better than reading a book, going to the movies or watching their kids game!***

- Four out of the last 10 times MVPD subscribers A18-64 used TVE, they watched a show by live streaming.
- Twenty-eight percent of TVE users report using TVE to live stream shows more now than they did last year. The majority (75%) report that the ability to do so makes TVE more valuable.
- The Super Bowl (24%), NCAA March Madness (10%) and The World Series (8%) were the sporting events TVE users reported they'd be most likely to watch via TVE.
- TVE can be a dining companion -- 24% of MVPD subscribers A18-64 who use TVE report they have done so while on their lunch break. Another 19% report doing so while eating dinner at home and 16% said they watched TVE while at a restaurant or bar.
- Fifty-five percent of TVE users report that it's as good or better than reading a book, 53% say it's as good or better than going to the movies and 42% report it's as good or better than watching their kids' game!

### **Permissible Uses:**

***Millennials are the most likely to share their login credentials with others or use someone else's login and they do the latter more frequently than other demographic groups.***

***Overall, there's still confusion around sharing authentication credentials.***

- Millennial MVPD subs are more likely than GenXers or Boomers to share their login information with a family member living somewhere else temporarily (29%) or a friend (26%).
- These Millennials are also more likely than other demographic groups to use login information from a family member (27%), a friend of a family member (22%) or a friend (18%).
- They also use others' credentials more frequently than other groups with 54% of Millennials reporting they do so at least a few times per week vs. 44% of GenXers and 25% of Boomers.
- Roughly one quarter of TVE users report they have a very clear idea of when it's permissible to share their MVPD login. Thirty-six percent of TVE users say they either don't have a very clear idea or have no idea at all of when it's ok to do so.