

THE STATE OF VIEWERSHIP



H1 2023 | UNITED STATES

ANALYZING APPROXIMATELY 45 BILLION
HOURS OF LINEAR AND STREAMING

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Opportunities abound with new AVOD and FAST offerings

With the first half of 2023 behind us, brands exploring ROAS benefits on OTT are seeing real-life rewards, with better-managed frequency and the ability to reach untapped audiences. Meanwhile, older audiences are keeping linear afloat as Gen Z consumers continue to shift towards new streaming options.

The final months of 2022 ushered in Netflix and Disney+ ad tiers and consumer response is becoming clear: the ability to personalize subscriptions allows us to watch more of our favorite shows when we want, how we want. Add FAST to the mix and advertisers can find ways to strike the right balance for every imaginable audience.

Amidst this shifting paradigm, it's essential for advertisers to exact targeting precision in creative and placement. With the omniscreen future upon us, advertisers need to tear down the silos between TV and the other content that audiences engage with to have one clear view of the consumer.

With impact of the writer's and actor's strike poised to shake up TV trends in the coming months, who is well positioned to weather the storm? Data from 2023 shows a strong link between bingeability and retention, while live streaming events will change the game even more dramatically with NFL football coming up. Streamers and advertisers embracing diverse representation are standing out from the crowd and reaching coveted audiences. Meanwhile, the vast majority of Americans use a second screen while watching TV, creating new opportunities for advertisers to emphasize direct calls-to-action.

The future of measurement is here, and advertisers and content creators who follow the data will be well positioned to meet the needs of today and tomorrow.



Team **Samba**

Methodology

Samba TV gathers viewership data via its proprietary Automatic Content Recognition (ACR) technology from tens of millions of opted-in Smart TVs. Samba TV's ACR is integrated at the chipset level across 24 of the top Smart TVs sold in more than 100 countries globally and captures content that crosses the TV screen, regardless of source. This results in unbiased, comprehensive viewership insights from around the world.

As is standard industry practice, Samba TV analyzes the large proprietary dataset to project household-level TV viewership utilizing its research panel of more than 3M smart TVs, balanced and weighted to the U.S. Census across age, gender, ethnicity, and household income. By contrast, Samba TV's panel is nearly 80x larger than the legacy industry model and is aligned to the US census by 0.03%.

Samba TV does not estimate viewership on non-TV devices such as mobile phones. Samba TV measures at the household level, and does not extrapolate to the individual viewer.

In this report, Samba TV first-party data is supplemented with data from a nationwide survey conducted within the U.S. from 3/23/23-3/27/23 among 2,506 adults by HarrisX. Results were weighted for age by gender, region, race / ethnicity, and income where necessary to align them with their actual proportions in the population.

01

TV Trends

With streaming platforms constantly evolving and updating their offerings, new consumer habits around TV consumption are emerging. With OTT consumption on the rise, FAST services are presenting huge opportunities for advertisers. Meanwhile, streaming powerhouses like Netflix and Disney+ recently introduced ad-tiers and viewers are showing willingness to watch ads in exchange for lower subscription fees.

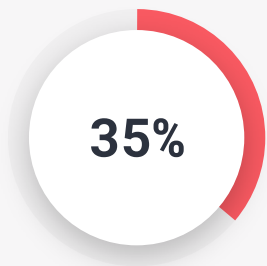


Linear reach grows year-over-year, despite low penetration among Gen Z

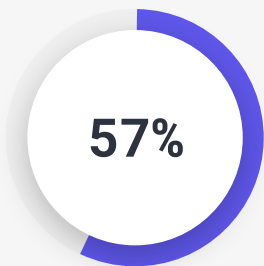
Driven by baby boomers, who comprise 70M U.S. adults, linear has maintained relevance in the homes of about half of the U.S. population. Meanwhile, younger generations like Gen Z have cut the cord at faster clips, with two-thirds of Gen Zers saying “no thanks” to cable subscriptions. Impacted by these generational preferences, the average daily reach of linear increased slightly during the first half of 2023, with about 57M households tuning in each day. Despite fluctuations year-over-year, this pace isn’t expected to hold as more of what keeps linear afloat, live sports and news, shifts to streaming. Advertisers relying on linear to reach audiences should look to streaming and new creative to engage younger consumers like Gen Z as they come of age and their buying power swells.

1/2

U.S. adults have a **monthly cable** or satellite TV subscription

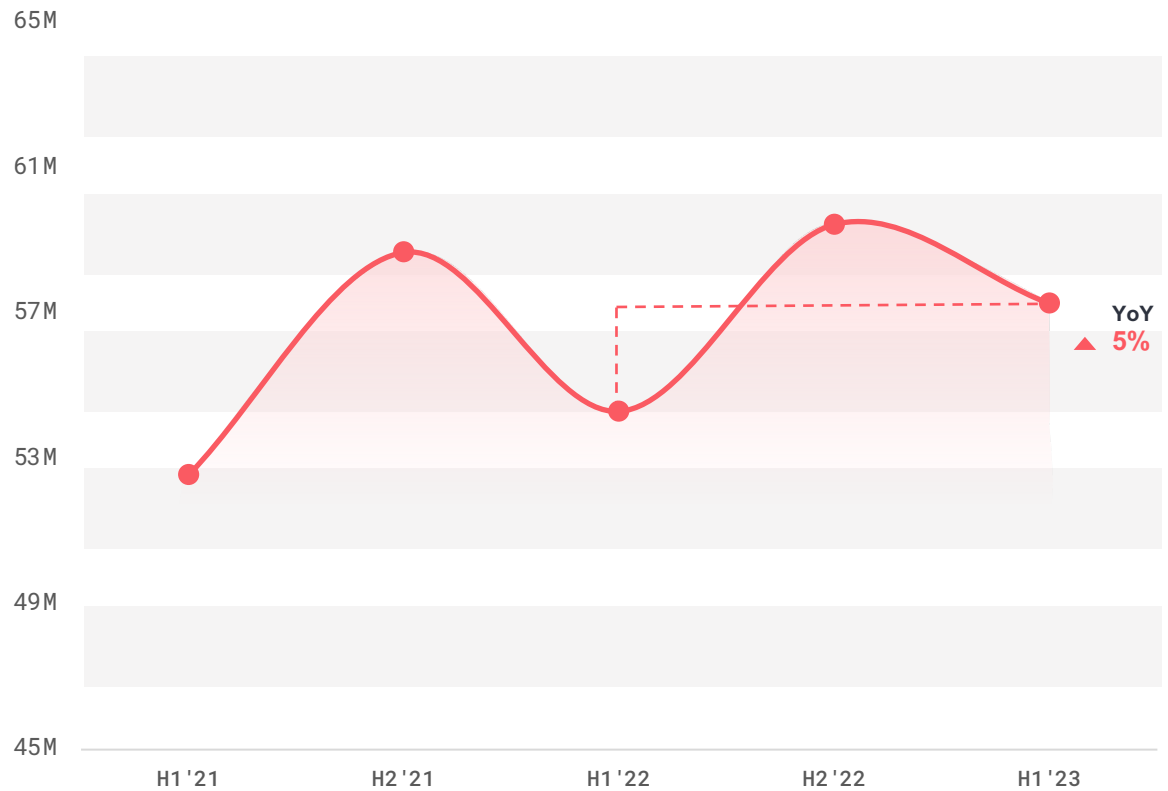


Gen Z



Baby Boomers

Average daily reach: H1 2021 – H1 2023



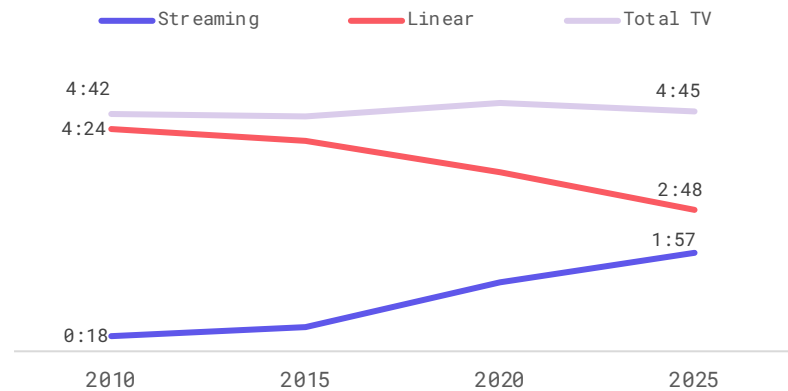
Despite OTT's year-over-year growth, linear sees seasonal sports boost in the fall

In fall 2022, OTT consumption took a backseat while linear was unsurprisingly boosted by live sports, one of its main drivers, with football, basketball, hockey, and baseball all taking place. In fact, seven out of the top 10 most watched programs of the half were NFL Playoffs games that occurred in January. Helping drive streaming's January spike were the top series and movie premieres hitting OTT, like *The Last of Us*. Both linear and OTT followed similar ebbs and flows into spring, with both experiencing six-month lows in June 2023 as viewers geared up for summer. Advertisers strategizing for seasonality would do well to make omniscreeen buys geared toward the winter months in the new year.



Daily time spent with TV, 2010-2025

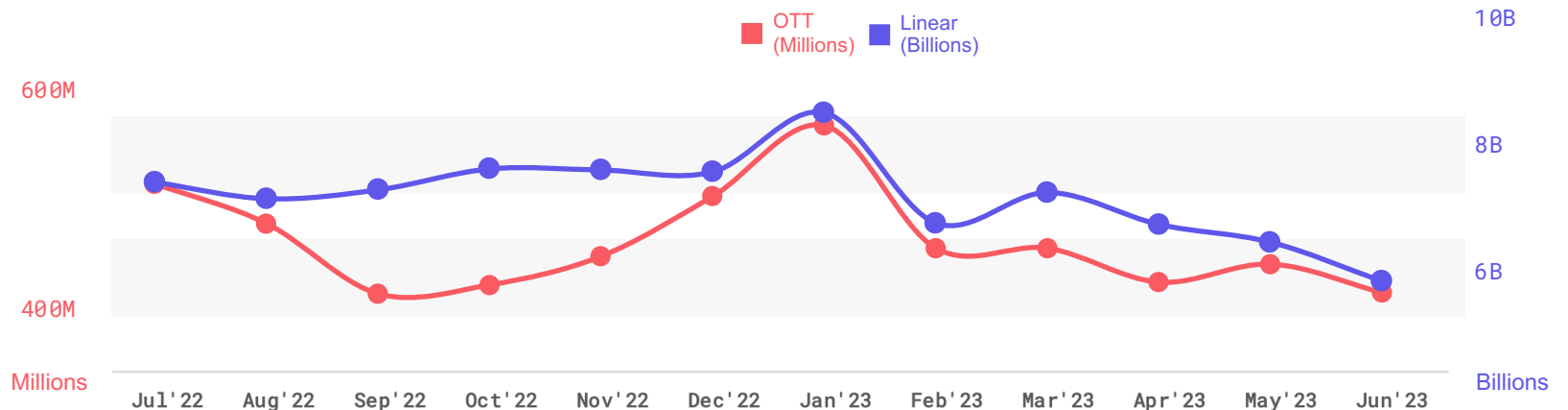
Source: eMarketer



Total TV hours watched:

OTT & linear

H2 2022 – H1 2023



Growth in FAST viewership presents new opportunities for advertisers

As OTT gobbles up more market-share, with almost 100M U.S. households streaming throughout the half, advertisers should be paying particular attention to FAST services. Each of the major free ad-supported streaming television (FAST) platforms tracked year-over-year growth in viewership during 2023, compared to Netflix and Peacock which saw slight declines. Amazon’s Freevee saw the highest growth among FAST services, up 11% year-over-year, compared to Amazon Prime Video which saw a much less substantial 3% bump. With consumers looking to cut costs and limit the number of paid services they subscribe to, FAST becomes more and more appealing to average Americans and, in turn, an excellent place for advertisers to reach them.

96M

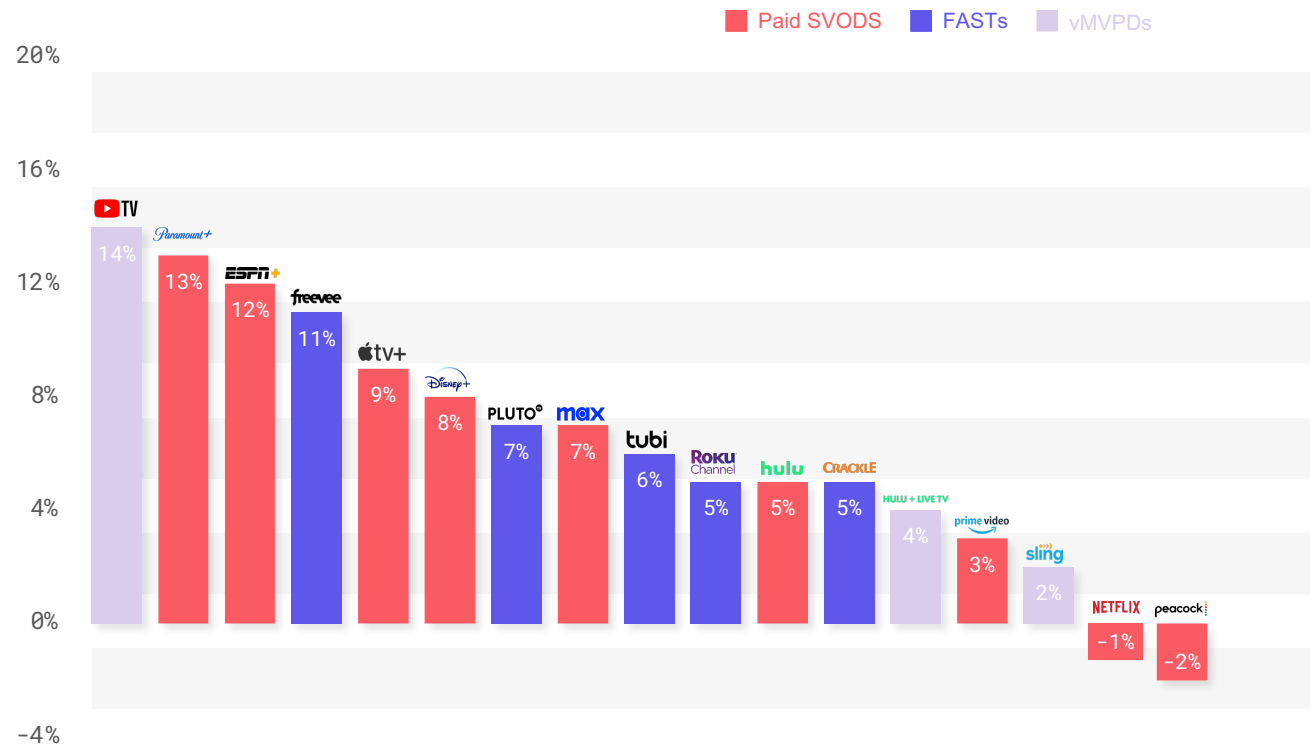
U.S. households watched **OTT content** during H1 2023

1 in 3

U.S. streamers subscribe to **FAST services**

Growth in video viewership by OTT platform, 2023 vs. 2022

Source: Insider Intelligence | eMarketer, Feb 2023



Consumers welcome AVOD with open arms

Streaming first hit audiences as an ad-free, content-when-you-want-it replacement to cable. But, as these a la carte streaming options swell, audiences are open to welcoming ads back in if it lowers their monthly costs. In fact, over half of U.S. adults say they would subscribe to discounted services if it meant watching ads, and Antenna subscription data from the first half of 2023 shows that becoming a reality. The first half of this year saw the impact of two of the largest platforms, Netflix and Disney+, introducing ad-tiers. The response from their launch was positive with over one-third of Disney+ sign-ups in 2023 coming from the ad-supported plan, alongside almost one in five Netflix sign-ups. With 25% of streaming video-on-demand (SVOD) subscriptions being ad-supported in 2023, up from 22% in 2022 and 19% in 2021, there are more opportunities than ever for consumers and advertisers alike.

60%

of U.S. adults **would consider subscribing** to a discounted streaming service if it meant watching ads

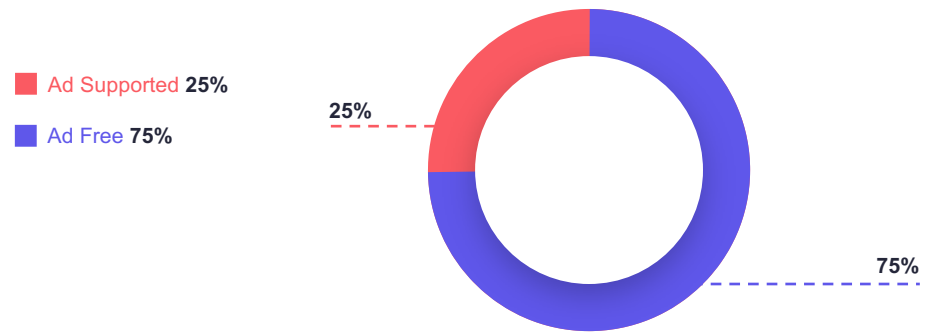
85%

of **Netflix and Disney+ subscribers** that use the ads plan signed up after it was introduced



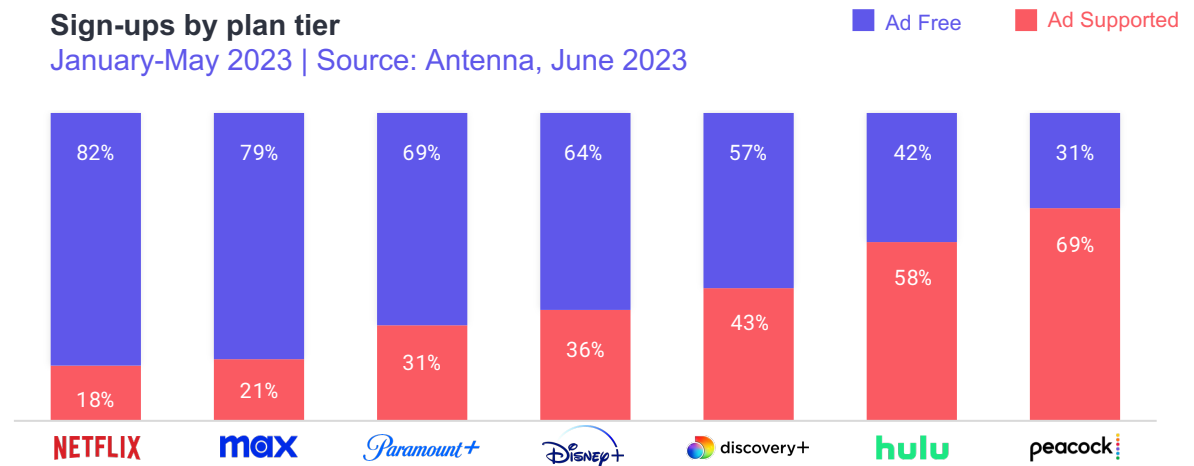
Premium SVOD subscriptions by plan tier

Source: Antenna, June 2023



Sign-ups by plan tier

January-May 2023 | Source: Antenna, June 2023



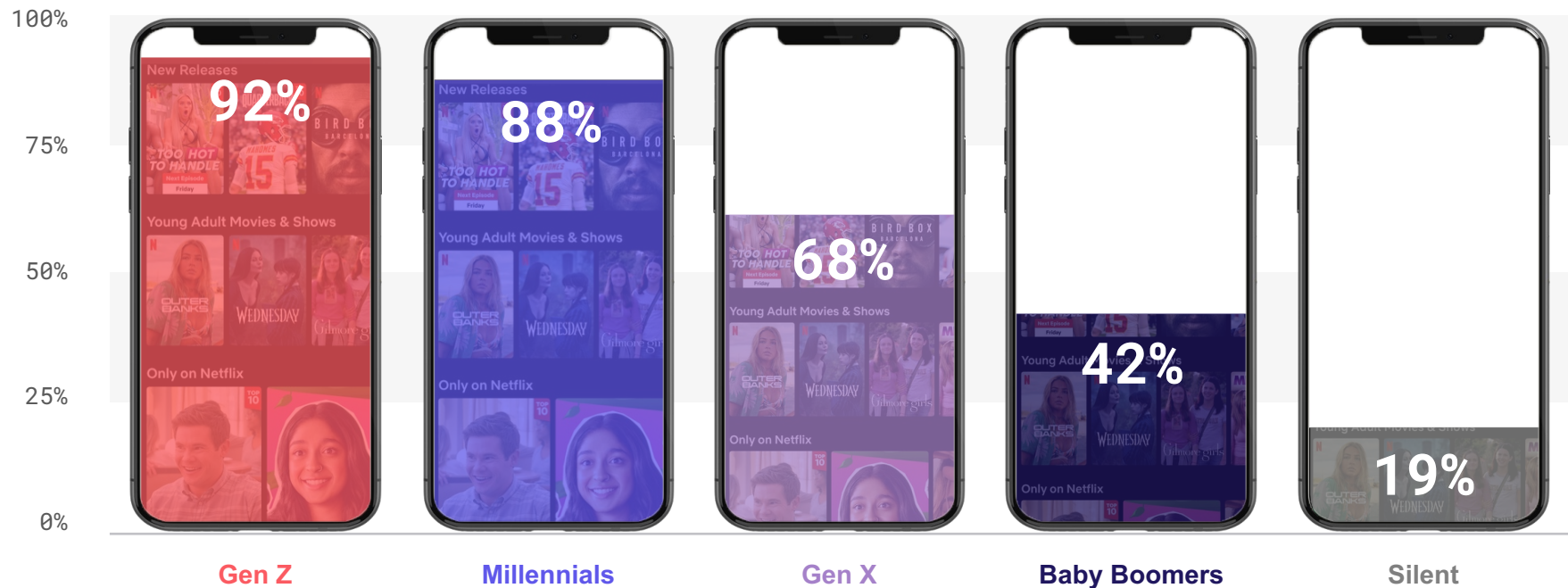
With a device always in hand, Gen Z and millennials are just clicks away from conversions

Mobile-first Gen Z and millennials don't shy away from watching video content on their phones, making it essential for advertisers looking to reach younger audiences to invest in mobile content. In fact, 42% of Gen Z prefers to watch videos on a mobile device such as a phone or tablet, with 73% of Gen Z doing so several times per day. This presents advertisers with exciting ways to drive measurable outcomes instantly, given the ease of acting on direct call-to-actions when a device is already in-hand.

73%

of Gen Z watches videos on mobile multiple times a day

Percentage of population that streams content on mobile



02

The Streaming Wars

Although many people subscribe to streaming services for only one piece of content, ad tiers are allowing more consumers to maintain multiple subscriptions at a time. Streamers are still in a challenging position, however, with top services driving lower average daily reach throughout the course of the half. Meanwhile, many viewers are demonstrating a preference for bingeing, with bingeable shows more likely to retain audiences.



Most streaming households watch three or less services

Although data still indicates that budget-conscious consumers are unwilling to maintain endless subscriptions, more advertising-based video-on-demand (AVOD) offerings by the likes of Netflix and Disney+ are contributing to more consumers opting to watch three or four services as opposed to one or two. Throughout the first half of 2023, about half of households watched two or less streaming services, while the majority watched three or less. Despite limitless options of content to watch across platforms, people remain unlikely to watch more than a few services over the course of a six-month period. With 90% of streamers watching AVOD and more FAST and AVOD offerings coming to market, this number may continue to grow over the coming months.

77%

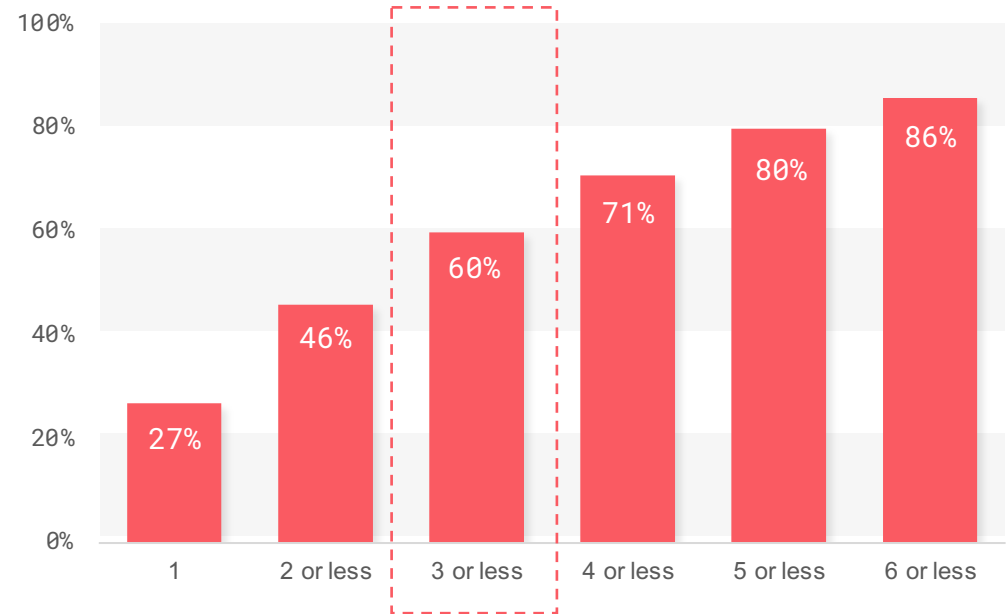
of U.S. adults **stream** TV content

90%

of U.S. adults who **stream** watch AVOD

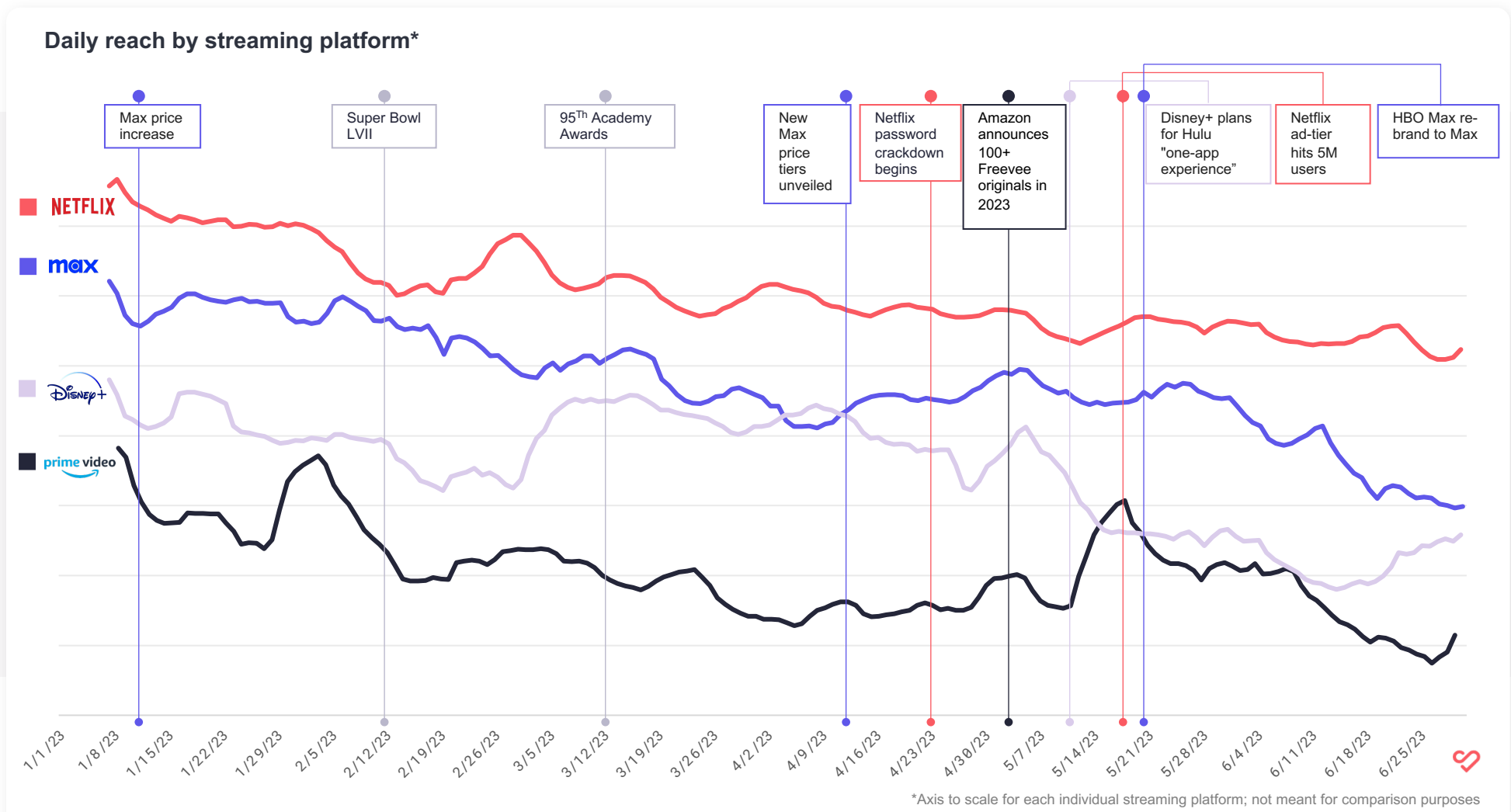


Percentage of streaming households that watch multiple services
H1 2023



Top streamers track downward reach ahead of expected challenges in the second half

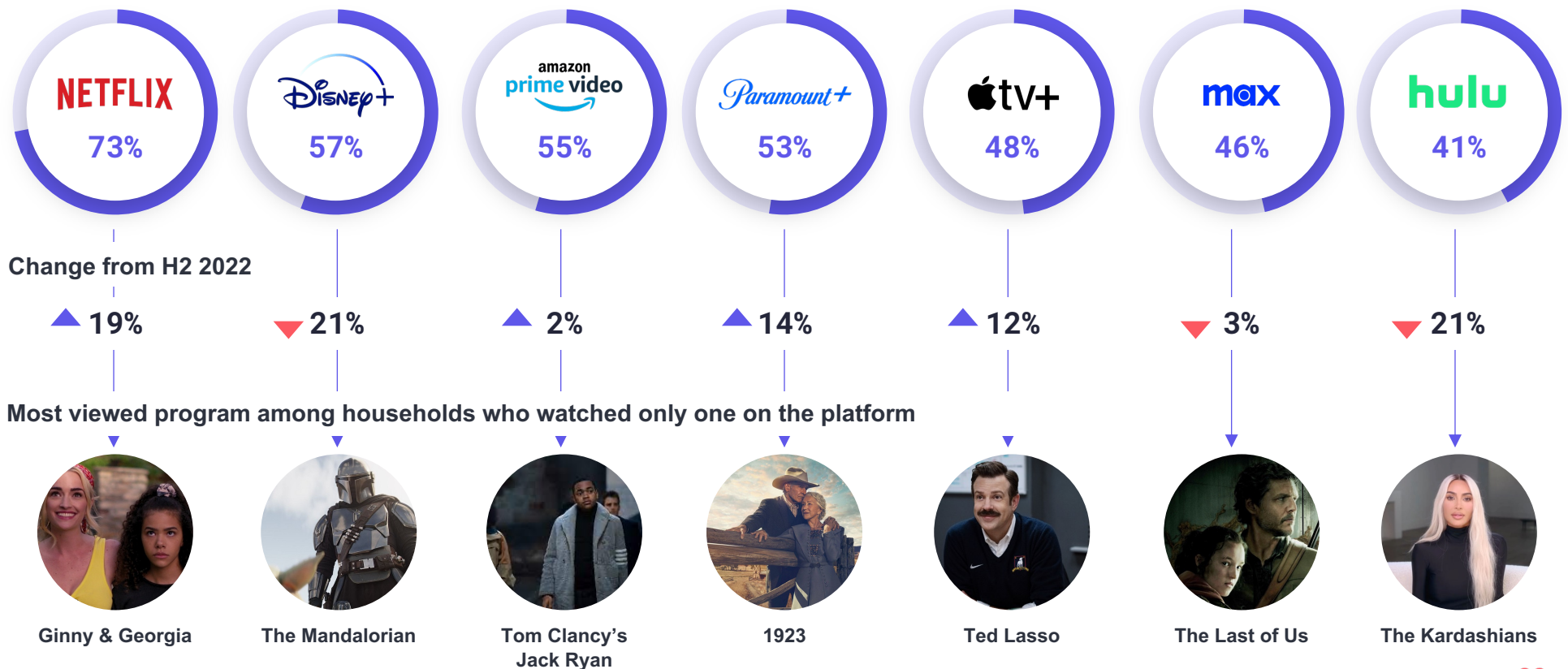
With repercussions from the SAG and WGA writer’s strike likely to be felt in the fall and winter schedule, top streaming platforms are already in a challenging position, with Netflix, Max, Disney+, and Amazon Prime Video all driving lower average daily reach in Q2 2023 than Q1 2023. Adding an extra challenge for Max in the first half was the rebranding of HBO Max to Max. In fact, Max’s reach throughout the half leading up to the rebrand was 32% higher than it was post-rebrand. Although each streamer tracked declines between quarters, Amazon Prime Video’s was least dramatic at 14%. With top streamers tracking downward reach throughout the half, the time is ripe for smaller entrants to scoop up market share through smart approaches to content and advertising.



Majority of streamers increased audience stickiness in H1

With an abundance of content options, it's essential to create audience stickiness beyond the marquee content that draws new viewers in. While Netflix and Disney+ were the top two platforms for audience stickiness, the majority of streamers actually increased their retention of audiences in spite of declining reach in the first half of the year. Netflix, however, showed the largest gains in retention with a 19% increase from the last half. The streamer added a large amount of content geared to Gen Z and young millennials, like top-reaching Ginny and Georgia. The second largest increase in retention went to Paramount+ as it continued to see success off of Taylor Sheridan shows. With both Netflix and Disney+ now offering AVOD tiers, new users and resulting user behaviors will prove if their audiences grow more fickle or are willing to stick around.

Percentage of viewers that watched more than one of the top 50 programs



*Programs include movies and any episode, or multiple, of a show

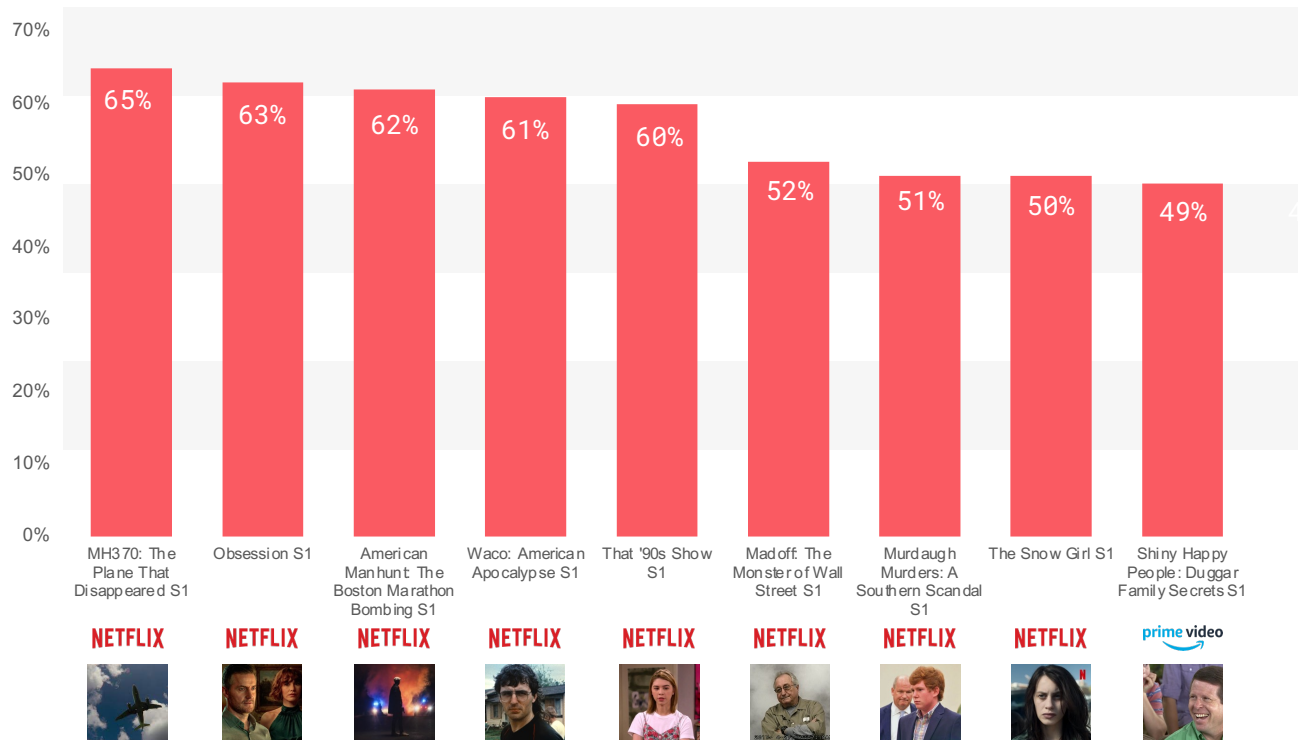


Viewers prefer to binge

With streamers competing for limited consumer attention, one differentiator has become the release model, with Netflix and Amazon generally adhering to the bulk or multi-part drop, while Max, Disney+, and others favor weekly episodes. Over two-thirds of U.S. adults identify as binge-watchers, and those viewers turned out for the 2023 slate of bingeable shows, with almost half of households that watched the top bulk-release shows of H1 2023 watching the whole season within the first five days. A majority of the most binged shows had three or four episodes, led by MH370: The Plane That Disappeared. Longer shows with prior seasons or iterations, like Outer Banks and Queen Charlotte: A Bridgerton Story, had a high share of bingers tuning in as well.



Top streaming shows with multi-episode releases on premiere date
 Percentage of 31-day season finishers that binged in first five days



47%

of **households** that watched the top bingeable premieres of **H1 2023** binged in five days on average

72%

of **U.S. adults** identify themselves as **binge-watchers**

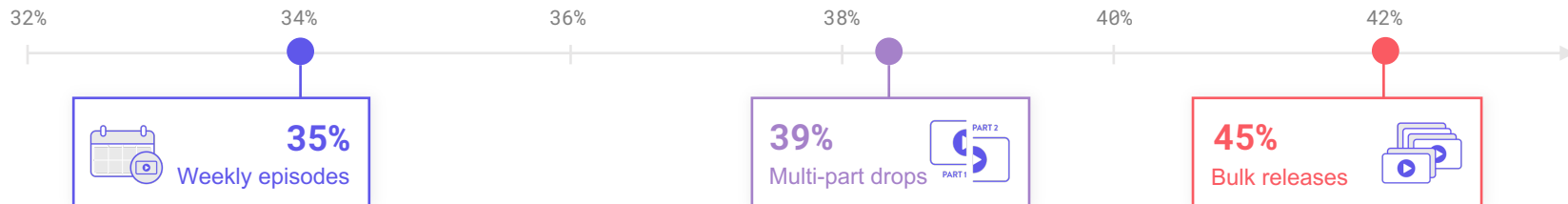
70%

of **millennials** are more likely to keep a subscription to **streaming** services that release **shows in bulk**

Bingeable shows have edge on audience retention

When audiences can binge their shows as quickly as they want, they're more likely to finish the whole season. The average retention between season premiere and finale across bulk releases was 45%, as compared with 35% across shows that released episodes weekly. With its bulk-release model, Netflix dominated from a retention standpoint, with Bridgerton spin-off Queen Charlotte retaining almost two-thirds of its viewers between premiere and finale. Meanwhile, weekly shows like Mayfair Witches (AMC+) and White House Plumbers (HBO & Max) retained less than one-quarter of households between premiere and finale. Looking at the highest retention weekly shows, each benefited from multiple seasons with built and committed fanbases. For advertisers, the takeaway is clear: bingeable shows with high audience retention means a captive way to reach consumers who will be home for a few hours and available to order delivery, shop online, and browse websites.

Average retention between season premiere and finale among the top 50 H1'23 shows*



Highest retention rate shows released in bulk

Retention from premiere to finale



NETFLIX
Queen Charlotte:
A Bridgerton Story
S1
61%



NETFLIX
Vikings:
Valhalla S2
59%



NETFLIX
Ginny & Georgia S2
56%

Highest retention rate shows released weekly

Retention from premiere to finale



apple tv+
Ted Lasso S3
52%



Disney+
The Mandalorian
S3
50%



max
Succession S4
48%

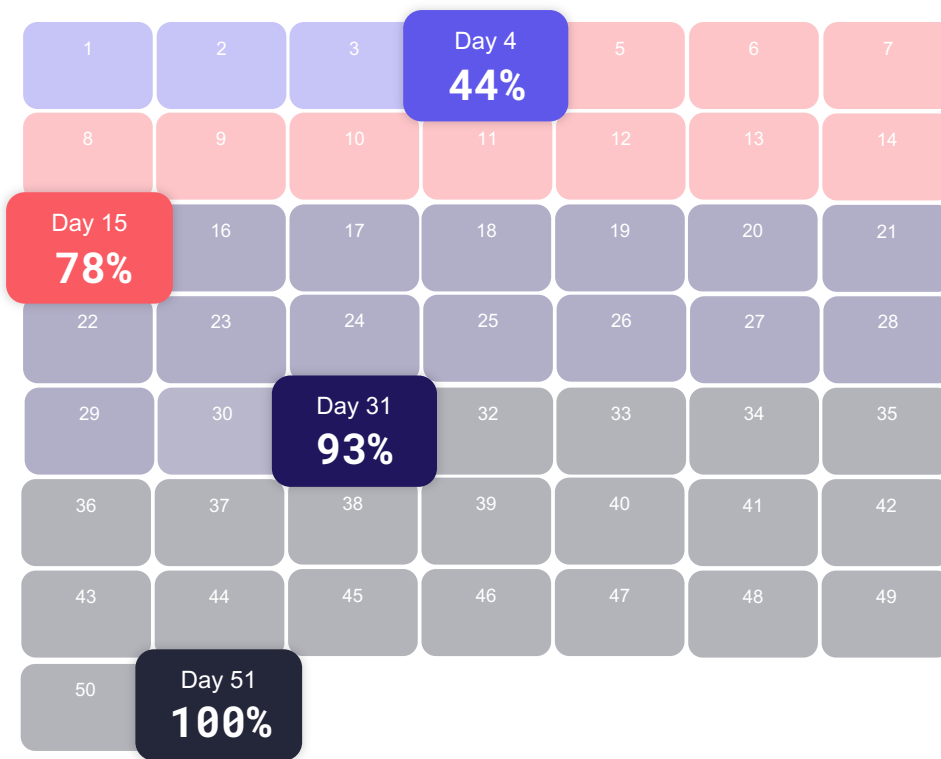
*Averages include data from the top 50 streaming premieres of 2023 to date; includes shows with 5 or more episodes



With majority of viewers watching new shows in the first two weeks, streamers should focus on early awareness campaigns

The hottest new TV premieres continue to soak up the majority of viewership within their first two weeks. In fact, all of the top 50 shows released in H1 2023 saw over half of their audience tune-in during the first fifteen days, and all but three saw more than two-thirds do so. The exceptions were Physical: 100, a South Korean reality show, and HBO's The Last of Us, the #1 show of 2023 to date. This small window to capture audience attention highlights the importance of aligning targeted promotional and discovery campaigns early.

Average household viewership achieved by day* Percentage of 51-day viewership



Shows with the longest shelf-lives

Based on percentage of 51-day viewership reached by day 15

	Physical: 100 S1E1	58%	NETFLIX
	The Last of Us S1E1	62%	max
	Poker Face S1E1	63%	peacock

Shows with the shortest shelf-lives

Based on percentage of 51-day viewership reached by day 15

	The Nurse S1E1	90%	NETFLIX
	That 90's Show S1E1	89%	NETFLIX
	MH370: The Plane That Disappeared S1E1	88%	NETFLIX

*Averages include data from the top 50 streaming premieres of 2023 to date released prior to 5/11/23 to allow a full 51-day viewership window to transpire

03

Biggest TV Moments

With streamers putting huge spend behind original content, what's paying off for the Netflix's and Max's of the world? Data from the first half of 2023 shows that dramas and thrillers are leading the way, with HBO's *The Last of Us* driving the highest viewership of the half. Diversity and representation is also proving to be a differentiator for streamers looking to engage diverse audiences.



Linear goes into overtime with NFL games

A staggering 88% of the top 100 linear programs in the first half of 2023 were sports related, driven largely by the first quarter’s usual flurry of NFL games in the lead up to Super Bowl, the biggest linear event of the year. Fox and CBS split the bragging rights across the top five programs by viewership. Looking at the top five of the 12 non-sports-related programs, it’s clear that big-ticket sports games offer a great opportunity to capture audiences already tuned in to surrounding programming. In fact, spillover viewership from a major game was responsible for all but one of the top five shows. The outlier? The Oscars, coming in at third-highest viewership, stood apart from the pack with viewership solely driven by the program itself.

88 out of the 100 most watched linear programs of H1 2023 were related to **sports**



Top H1 2023 linear programs Live + same day household viewership

	Network	Household Reach
Super Bowl LVII	FOX	36.7M
Super Bowl LVII Post-Game	FOX	29.9M
NFL Playoffs AFC Championship Game	CBS	28.9M
NFL Playoffs Divisional Game	FOX	24.4M
NFL Playoffs Divisional Game	CBS	24.3M

Top H1 2023 linear programs (excluding sports) Live + same day household viewership

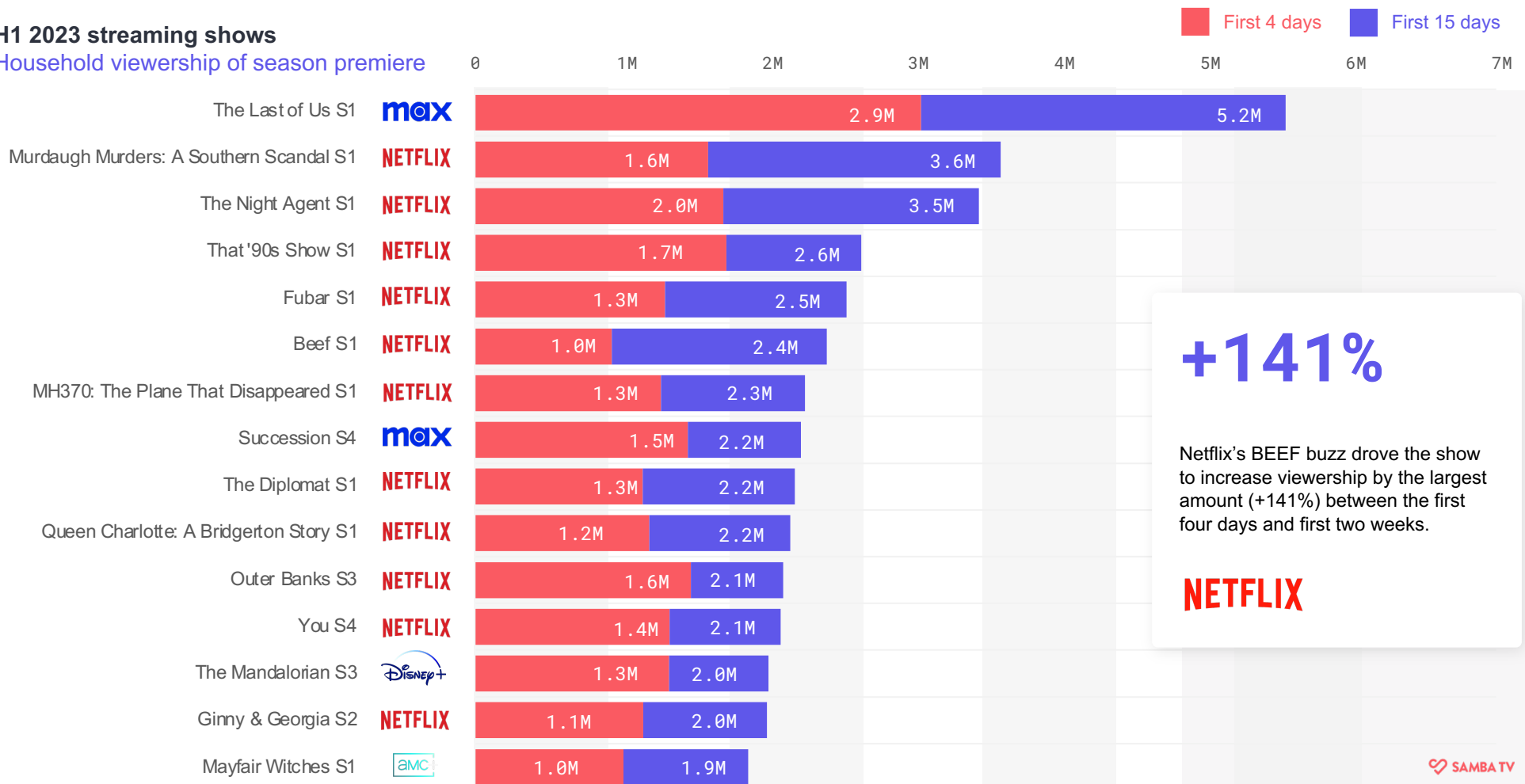
	Network	Household Reach
Fire Country	CBS	19.1M
Next Level Chef	FOX	14.9M
The Oscars	abc	13.3M
Star Wars: Episode IV - A New Hope	TNT	8.4M
60 Minutes	CBS	7.9M

Originals pay off for streamers

Original streaming series are winning audiences. HBO's *The Last Of Us* was the number one performer for initial viewership of its premiere, while Netflix's *BEEF* benefitted from post-debut buzz to see a 141% increase in viewership over its first two weeks. That wasn't the only hit for Max as the final season of *Succession* performed well amongst others like Disney+'s *The Mandalorian*, and breakthrough-hit AMC+'s *Mayfair Witches*. Netflix, however, dominated the pack with 12 out of the top 15 streaming series made up of its original content.

H1 2023 streaming shows

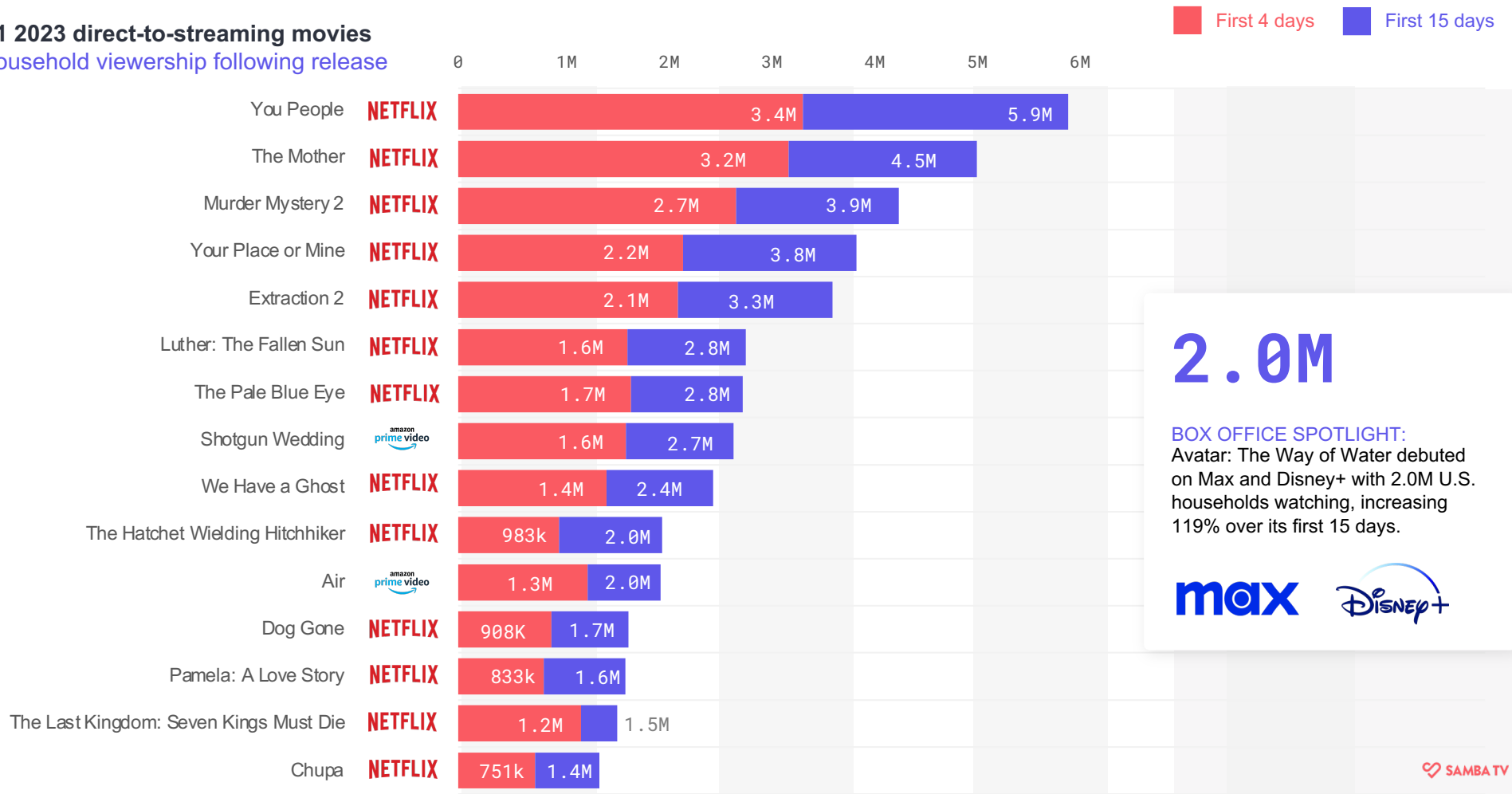
Household viewership of season premiere



Netflix dominates top streaming movies, post-theatrical rights a smart investment for others

Thirteen of the top 15 streaming movies of the first half were Netflix originals, including two sequels. With approximately 88% of original programming outlays spent on scripted titles for global streamers, Netflix’s consistent spend of \$17B has been smartly allocated to investing in romcoms and action-adventure flicks. With many sports fans turning to Amazon Prime Video for live Thursday Night Football games, the streamer may be looking to capture cross-over viewers with scripted investments like Air. Interestingly, the investment in post-theatrical rights also pays off for streamers. Looking at VODs and post-theater debuts not analyzed in this list, for example, Disney+ and Max saw strong numbers for the debut of Avatar: The Way of Water even after nearly four months in theaters.

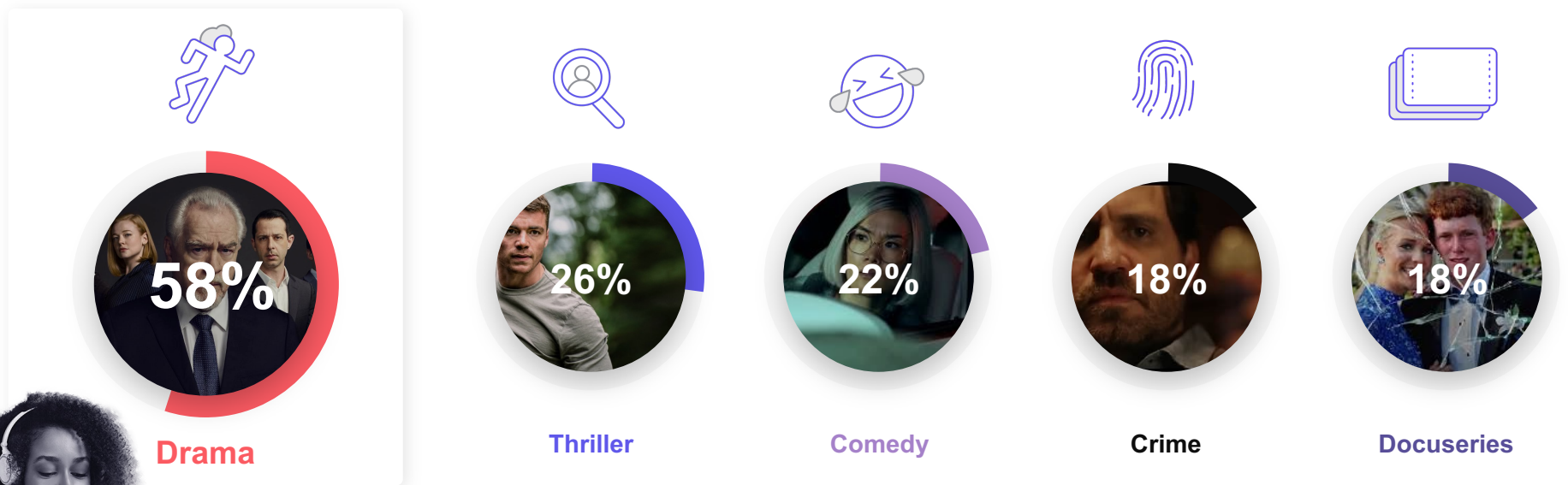
H1 2023 direct-to-streaming movies
Household viewership following release



Audiences come for the drama across streamers

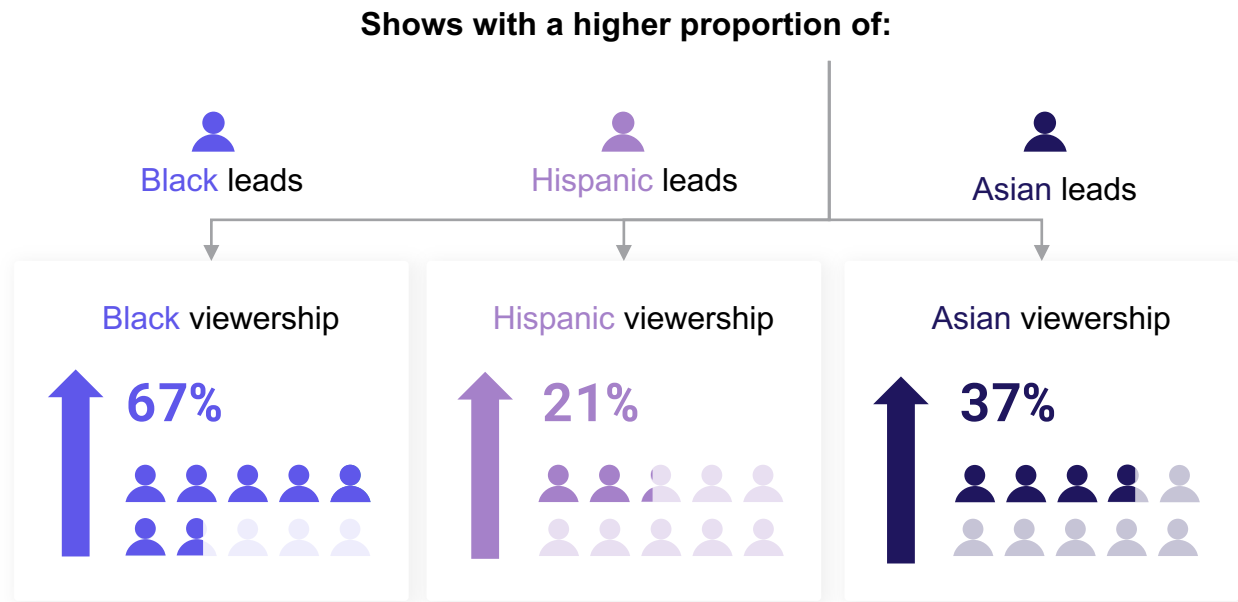
Despite drama making up just 8% of programming spend for global streamers, the genre made up more than 50% of the top 50 streaming shows of the first half of the year. Rounding out the top three with over a quarter of the most-watched shows each were thrillers and comedies, typically accounting for drawing the first and third largest portions of original content spend respectively. Crime and docu-style programming, however, came in fourth and fifth, meaning that while these mainstays for original content are still yielding strong viewership, investing in dramas may yield larger audiences.

Most represented genres across the top 50 streaming shows H1 2023

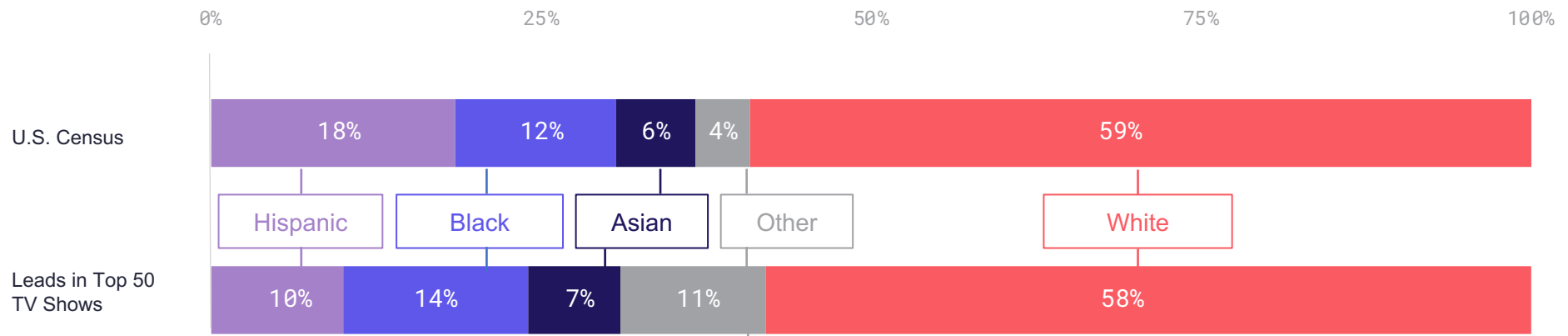


Diverse content imperative to reaching diverse audiences

Diversity and representation on TV is not just a moral imperative but makes good business sense. As the country grows increasingly diverse, the TV industry must adapt to reach new audiences. For example, Hispanics make up nearly 20% of the U.S. population, but are only 10% of leads in top programming. Our data shows that diverse audiences overwhelmingly respond to diverse content, with Black, Hispanic, and Asian households all more likely to watch TV where they see themselves represented. Content creators and advertisers should look closely at how well they're optimizing for these audiences or risk losing them to competitors.



Census breakdown vs. leads in top TV shows



Streamers encroach on linear's thunder with live content

Data has shown that sports is the saving grace of linear, as 88 of the most watched linear programs of the half were related to sports. With the rights to major sporting events being gobbled up by streamers (likely to have major implications on tune-in to the 2023 NFL season), platforms like Netflix are offering a glimpse into how live entertainment content will fare streamed. Chris Rock: Selective Outrage was the latest example, marking Netflix's first ever live stand-up special. Almost 450k U.S. households tuned in to the event live, with Black households over-indexing by the highest margin (+59%). A positive bonus, the live release didn't stop people from watching weeks after, with viewership shooting up to 3.7M households at the 15-day mark.

6 in 10

Netflix and Disney+ subscribers would watch live events if those services offered more of them



Streamers jump into live

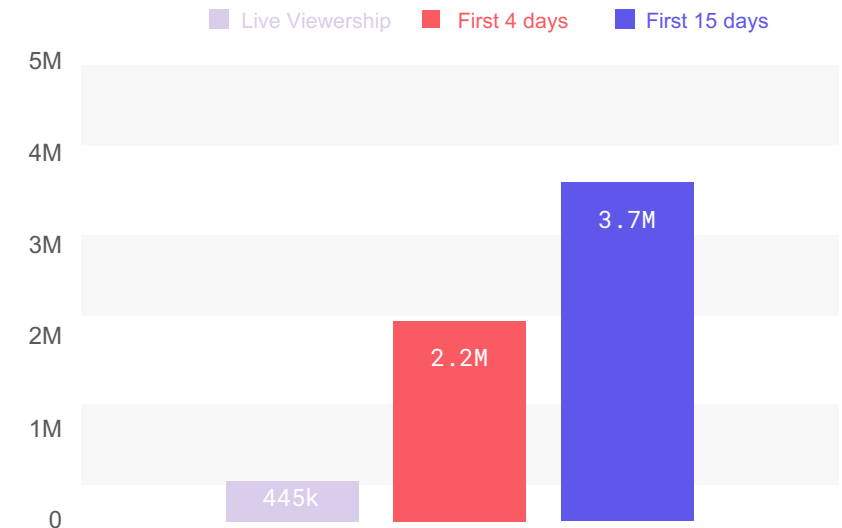
Thursday Night Football	prime video
Wild Card Weekend NFL playoff game	peacock
NFL's first Black Friday game	prime video
MLB Friday night games	apple tv+
MLB Sunday games	peacock
MLS Season Pass	apple tv+

Chris Rock: Selective Outrage viewership index by ethnicity

Based on live viewership

White	▼ 4%
Black	▲ 59%
Hispanic	▼ 16%
Asian	▼ 19%

Chris Rock: Selective Outrage household viewership



04

Linear & OTT Advertising

With the vast majority of Americans multitasking on their phones while they watch TV, advertisers have new opportunities to drive instant outcomes. So which brands are leaning in? Data shows that QSR and telecom brands are serving more impressions year-over-year, while advertisers across the board have a long way to go in reaching diverse audiences proportionally.



Insurance cools it on ad spend, while telecom and QSR heat up

While insurance brand Progressive remained number one on the advertising charts, notably absent from the top 20 was GEICO, which ranked as the number two brand in the first half of 2022. Similarly, Liberty Mutual tracked a 33% decline in impression count from H2 2022, bringing it down from the number two spot in H1 2022. Meanwhile, telecom, QSR, and automotive household names like Verizon, Subway, and Chevrolet saw year-over-year growth that brought them to the top of the charts. Verizon drove a 103% year-over-year increase in ad impressions, leaning into its new ads for myPlan. Pharma also ranked highly this half, with DUPIXENT and Skyrizi both cracking the leaderboard.



Top linear + OTT advertisers by impressions: H1 2023

1	PROGRESSIVE	11	Downy
2	Domino's	12	CHASE
3	verizon	13	GOLO for Life
4	Liberty Mutual INSURANCE	14	TOYOTA
5	SUBWAY	15	Dove
6	CHEVROLET	16	xfinity
7	DUPIXENT (dupilumab)	17	Skyrizi
8	BURGER KING	18	LEXUS
9	Wendy's	19	McDonald's
10	T-Mobile	20	intuit turbotax.

*Excludes TV networks

92% of ads reached only half of U.S. households

As consumer habits shift across linear and OTT, who are ads really reaching? Samba TV data shows that half of TV viewers - those who consume the most linear TV - are seeing the vast majority of ads (92%), while the other half of TV viewers are seeing just 8% of ad impressions. While half of Americans were underreached or not reached at all, the other half were bombarded by over 150 TV ads daily, driving ad fatigue among the overexposed.

153

Average number of TV ads seen per day by the **top 50%** of linear viewers

14

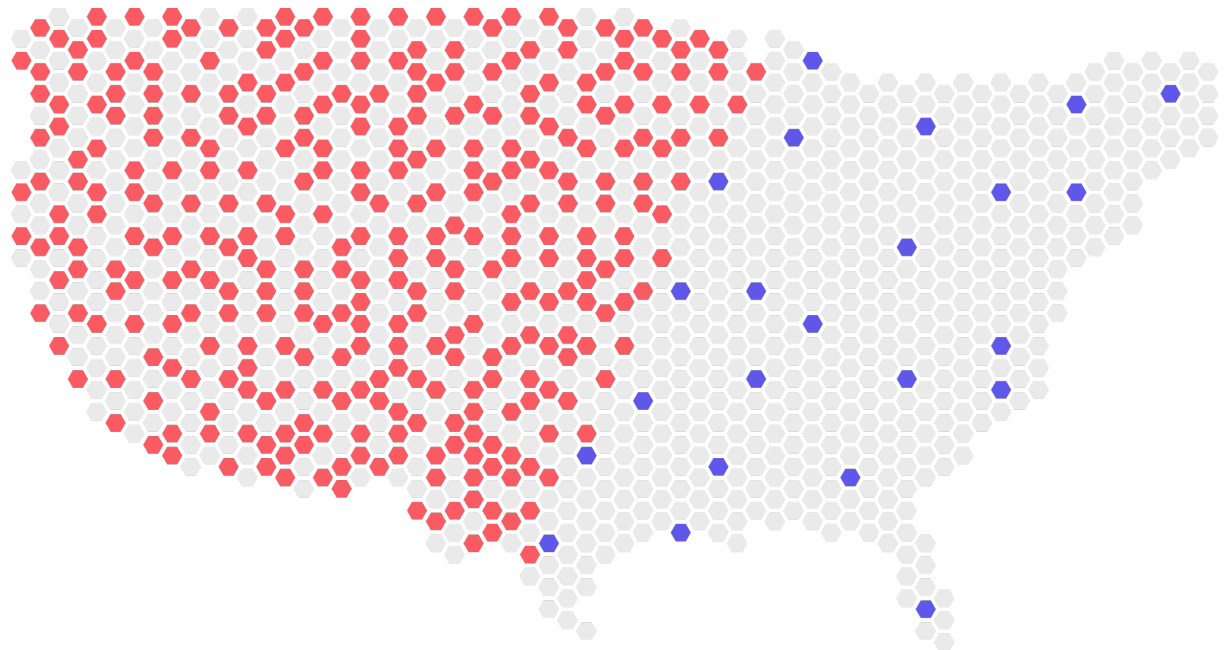
Average number of TV ads seen per day by the **bottom 50%** of linear viewers

62%

of people say it takes only **2-5 repeated viewings** of the same ad in a month-long period to worsen their perception of the brand

92% of TV ad impressions reached the **top 50%** of linear TV households:
H1 2023

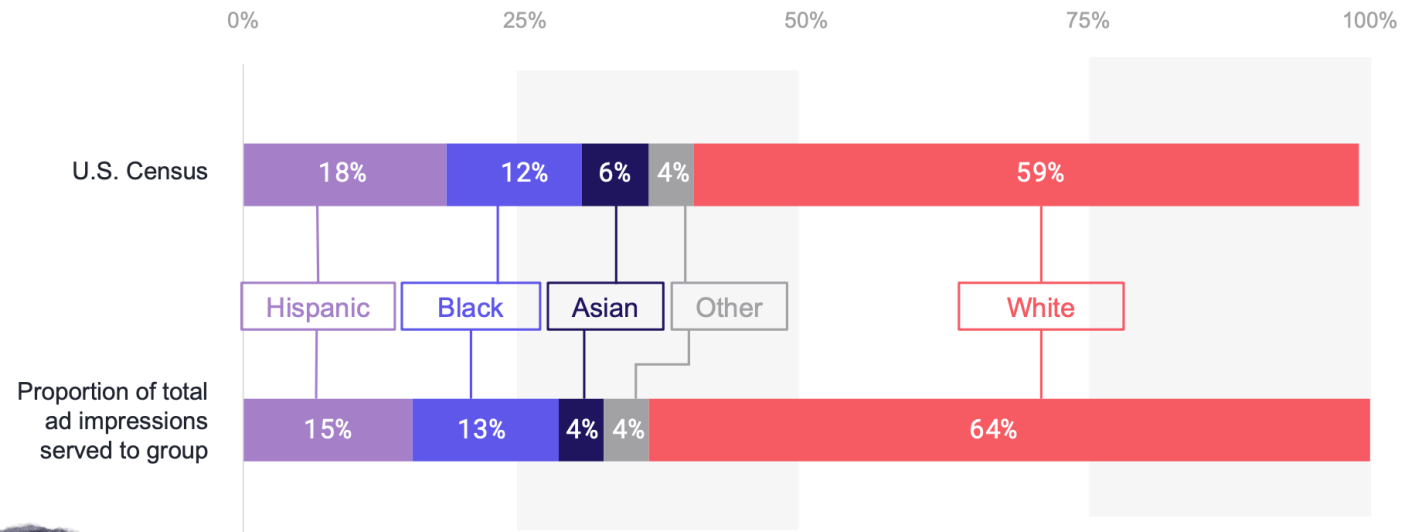
8% of TV ad impressions reached the **bottom 50%** of linear TV households:
H1 2023



Advertisers are underserving Hispanic and Asian audiences

Across OTT and linear ads, the majority of impressions are reaching white households at a disproportionate rate to their audience size. Meanwhile, ads are underreaching Hispanic and Asian audiences. With \$2T in spending power and making up close to 20% of the U.S. population, the Hispanic audience is a massive one for advertisers and data shows that current strategies for reaching them are falling short. Similarly, with buying power of \$1.6T the Asian audience is key for any brand and is currently underserved. In the context of the country’s changing landscape, it is imperative that advertisers find meaningful ways to reach these groups.

Ad impressions served by ethnic group vs. census breakdown



The overwhelming majority of Americans opt for a second device while watching TV

Almost all Americans multitask while watching TV. Whether it's scrolling on a phone or adding items to their virtual shopping carts, eight in 10 U.S. adults are plugged into another device while also sitting in front of the biggest screen in the home. The social media generations, Gen Z and millennials, are unsurprisingly scrolling their feeds while watching TV. Meanwhile, the majority of Gen X and baby boomers are checking their inboxes and sending emails as they watch TV. Despite the splintering of attention across multiple devices, advertisers have a unique opportunity to deploy an omniscreen approach to their strategy that embraces new creative like QR codes to connect to these multitasking audiences.

8 in 10

U.S. adults look at a mobile device while watching TV

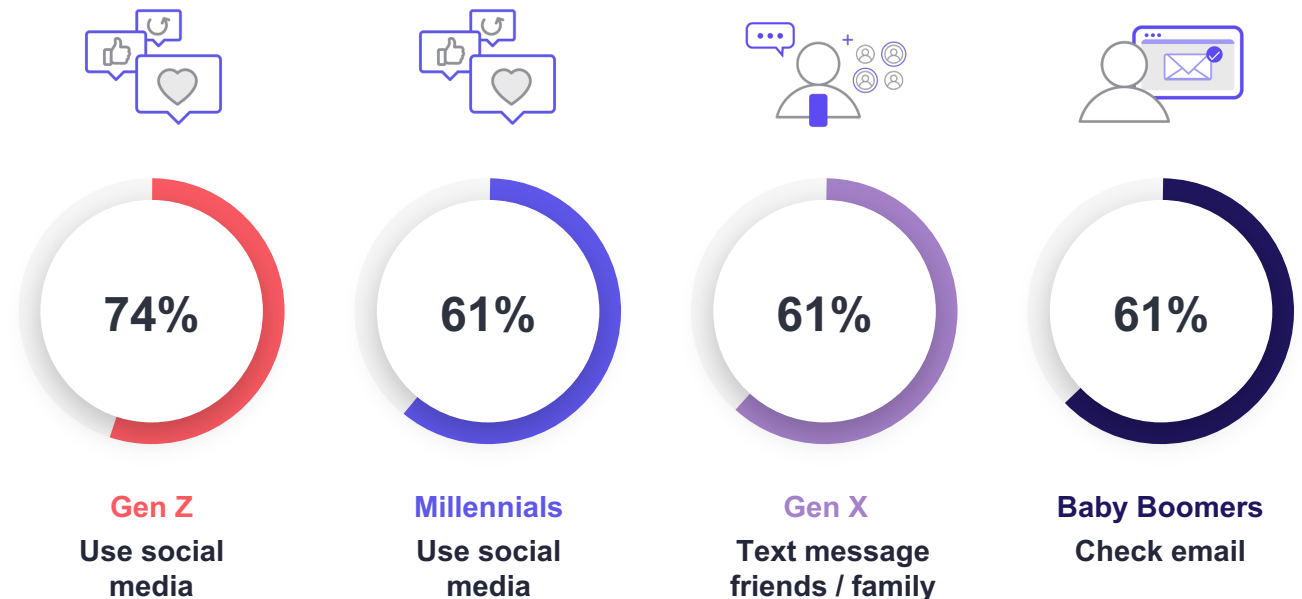
1 in 3

U.S. adults shop online while streaming TV

1 in 5

millennials have made purchases through QR codes shown on a TV ad

Top activity engaged in while streaming TV by generation



QSR ad spend increased throughout the half, with pizza taking the largest bite of the pie

Fast food and fast casual dining ad spend is seeing strong tailwinds even in the years following the pandemic, with more than half of the top quick-service restaurants (QSR) advertisers driving increases in ad impressions versus 2022. More Americans embracing instant delivery options may be partially fueling this uptick as QSRs now compete with traditional restaurants. In the first half of 2023, pizza was king, as Domino's topped the list of QSR advertisers by impressions. Pizza was also on top from a growth standpoint, with Papa John's driving the highest year-over-year increase among top advertisers. From a generational standpoint, Denny's worked to capture new audiences in Gen Z, whereas Long John Silvers sought to drive baby boomers into restaurants.

Top QSR advertisers by linear + OTT ad impressions H1 2023

	H1 2023 vs. H1 2022	Share of voice
1	Domino's -3%	10%
2	SUBWAY +8%	7%
3	BURGER KING +37%	6%
4	Wendy's +17%	6%
5	McDonald's -3%	5%
6	SONIC -12%	5%
7	PAPA JOHNS +47%	4%
8	POPEYES +7%	4%
9	TACO BELL -15%	3%
10	Starbucks +28%	3%
Other		47%



Largest increases in impressions among top QSR advertisers: H1 2023 vs. H1 2022



Top QSR advertiser by generation based on percentage of impressions served to age group: H1 2023

Gen Z	
Millennials	
Gen X	
Baby Boomers	

QSR advertisers have room to increase precision among audiences that eat fast food

With the vast majority of people who eat fast food weekly using a mobile device while watching TV, advertisers should be doing everything they can to stay top-of-mind among this audience. However, the top linear and OTT advertisers reaching these households are oriented towards pharma and video games, with no QSR advertisers cracking the top five. With 40% of fast-food consumers shifting away from paid TV, where can advertisers best reach them? Data shows that this audience favors content starring Black leads, such as Starz's BMF and Power Book II: Ghost. When they do watch linear it's likely to be kids programming, with Disney Jr. and Nicktoons cracking the top three networks.



84%

of people who eat fast food weekly use a mobile device while watching TV

81%

of people who eat fast food weekly would be more likely to purchase a product on their TV if a QR code offered a discount

40%

of people who eat fast food weekly do not have paid TV

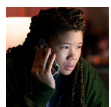
Top 3 indexing streaming programs among fast-food households: H1 2023



STARZ
BMF



STARZ
Power Book II: Ghost



peacock
Bel Air

Top 3 indexing linear networks among fast-food households: H1 2023



Top OTT + linear advertisers*: H1 2023



*Excludes TV networks

*By percentage of impressions served to households that eat fast-food frequently in H1 2023

Walmart and Amazon dominate the retail space, despite year-over-year declines

Retail sales growth slowed in 2022 and advertisers are largely struggling to keep pace reaching audiences in turn, despite expected 2023 growth. Half of all retail advertisers saw decreases in ad impressions versus the prior year, with the top three advertisers all tracking declines. Walmart topped all retail advertisers in the first half of the year, followed by e-commerce giant Amazon, with both comprising 3% share-of-voice within the vertical. Online shopping shows it's here to stay, however, with e-commerce company Zulily driving the largest increase in impressions year-over-year. Meanwhile different advertisers are reaching key demographics, with furniture rent-to-own store Rent-A-Center reaching younger Gen Z audiences who may still be establishing themselves.

Top retail advertisers by linear + OTT ad impressions H1 2023

	H1 2023 vs. H1 2022	Share of voice
1	-6%	3%
2	-23%	3%
3	-7%	3%
4	0%	3%
5	+16%	3%
6	-22%	3%
7	+2%	3%
8	-16%	2%
9	+36%	2%
10	+29%	2%
Other		73%



Largest increases in impressions among top retail advertisers: H1 2023 vs. H1 2022



SEPHORA



Top retail advertiser by generation based on percentage of impressions served to age group: H1 2023

Gen Z



Millennials



Gen X



Baby Boomers



Sports and news networks show growth in linear ad impressions

While broadcast networks continue to serve the lion’s share of linear ad impressions, cable sports and news networks saw the most momentum year-over-year. ESPN advanced one place on the charts, while MSNBC climbed up five spots. FOX News continues to edge out FOX for the #4 spot, further highlighting the importance that news and sports play in keeping linear TV afloat.

Top linear networks by ad impressions	Ad impressions share of voice	Rank change year-over-year
1	8%	+1
2	8%	-1
3	7%	--
4	5%	--
5	5%	--
6	3%	+1
7	3%	-1
8	3%	--
9	2%	+5
10	2%	--



05

Consumer Snapshots

Samba TV's data offers comprehensive demographics including age, income, and ethnicity, all mapped to the U.S. Census to provide the most accurate measurement possible. So what are key groups watching, and how have their habits shifted with changes in the TV landscape? We took a look at a few key groups to help shed light on their behavior.



Gen Z embraces diversity in streaming shows, along with Spanish-language networks

Growing up with streaming, the generational shift away from linear TV continues for Gen Z adults with two-thirds leaning toward AVOD and FAST. Netflix, which features a wide variety of shows with diverse leads, is the streaming platform of choice for Gen Z audiences. With the vast majority of Gen Z valuing diversity in the TV they watch and one in four identifying as Hispanic, Gen Z viewers flock to Spanish-language networks on linear, including Discovery Familia and NBC Universo. In an increasingly competitive entertainment and streaming landscape, marketers and content creators alike have a unique opportunity to think differently about reaching and retaining this fast-growing audience, with pharma advertisers like Tukol leading the way.



88%

of Gen Z say **diverse representation** is important when choosing TV to watch

25%

of Gen Z subscribes to **FAST services**

60%

of Gen Z would consider subscribing to a **discounted streaming service** if it meant watching ads

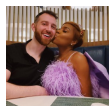
Top indexing streaming programs: H1 2023



NETFLIX
Outer Banks



NETFLIX
Kaleidoscope



NETFLIX
Love is Blind

*Excludes TV networks

*By percentage of impressions served to Gen Z households in H1 2023

Top indexing linear networks: H1 2023



Top OTT + linear advertisers* H1 2023



Kid's programming remains on top for **millennial** households, with toy brands leaning in

Today's kids, or Gen Alpha, are the first generation to grow up in majority cord-cutter households thanks to their millennial parents. Whether it's educational videos for toddlers or a family-friendly film for movie night, streaming platforms are succeeding at providing a wide range of choices for on-demand children's content. Netflix garnered the top three indexing programs for millennial households in the first half of the year, while Disney and Disney Jr. were the top indexing networks on television. Over one-third of millennials shop online while watching TV, creating an opportunity for advertisers to drive instant omniscreeen outcomes. Many toy companies are already capitalizing on this attention, including Hot Wheels and Mattel with its huge marketing push for the Barbie movie.

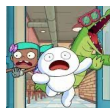


38%
of millennials **shop online** while watching TV

32%
of millennials subscribe to **FAST services**

65%
of millennials would consider subscribing to a **discounted streaming** service if it meant watching ads

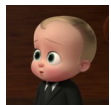
Top indexing streaming programs: H1 2023



NETFLIX
Oddballs



NETFLIX
Gabby's Dollhouse



NETFLIX
The Boss Baby:
Back in the Crib

*Excludes TV networks

*By percentage of impressions served to millennial households in H1 2023

Top indexing linear networks: H1 2023



Top OTT + linear advertisers*: H1 2023



Representative programming and advertising resonates with **Hispanic** audiences

Comprising almost 20% of the U.S. population and amounting to \$2T in buying power, the Hispanic audience is not one to be overlooked by content creators or advertisers. The Hispanic audience has become one of the fastest growing demographics, and thoughtful advertising can resonate well. For example, one of the top linear advertisers in the first half of the year was Mazola, which released multiple Spanish-language ads. From a viewership standpoint, Hispanic households favored Disney+, with Avatar: The Way of Water and Black Panther: Wakanda Forever leading the way - both theatrical releases that were ultimately released via streaming. With 81% of this audience opting to stream content on their mobile devices, an omniscreen approach is imperative.



50%

of Hispanic people **do not have** have cable or satellite TV



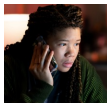
81%

of Hispanic people stream video content on **mobile devices**

59%

of Hispanic people would consider subscribing to a **discounted streaming** service if it meant watching ads

Top indexing streaming programs: H1 2023

-  **Disney+**
Avatar:
The Way of Water
-  **Disney+**
Black Panther:
Wakanda Forever
-  **NETFLIX**
Missing

*Excludes TV networks

*By percentage of impressions served to Hispanic households in H1 2023

Top indexing linear networks: H1 2023

- 
- 
- 

Top OTT + linear advertisers*: H1 2023

- 
- 
- 

Key takeaways from the first half of 2023



Better manage frequency with OTT advertising

For years, linear has been oversaturating the same viewers with hundreds of ads. Comprehensive, omniscree measurement is essential to manage frequency across the new opportunities that OTT presents.



Use advanced data to target audiences with precision

With consumer habits shifting constantly, it's more important than ever to be precise when developing a targeting strategy. Use comprehensive, first-party datasets to engage with the specific audience you're looking for.



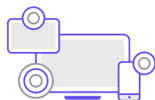
Embrace new opportunities with FAST and SVOD ad-tiers

With Netflix and Disney+ ad tiers showing permanence among viewers and FAST growth exploding, advertisers should engage with all the new strategies at their disposal to find audiences exactly where they are.



Keep diversity top of mind in both casting and choosing ad blocks

Hispanic and Asian representation is lacking on TV and both groups are underserved with ads. Content creators should make these groups a priority when casting, and advertisers should ensure they are prioritizing ad blocks with diverse representation.



Drive real-life outcomes among Gen Z and millennials with calls-to-action

Cord-cutting younger generations are always with their mobile devices and willing to engage with emerging technologies. Ensure ads contain click-to-complete CTAs to drive measurable outcomes.