

T>>>VISION

# CTV & TV Trends

*Year In Review*

*December 2023*





# Looking Back at TV Viewing in 2023

*Live Sports, CTV Advertising and yes, even Taylor Swift*

Since we started measuring every second of television viewing back in 2015, each year has felt like the most transformative year for television yet — and 2023 is no exception.

Over time, we've witnessed the transformation from cable and broadcast dominated TV to viewers spending more time with streaming TV. Streaming TV has evolved from a mostly ad-free environment to one that is now advertisers' biggest emerging opportunity to reach engaged viewers.

With change and evolution a constant in the television and advertising industry, we take a look back at 2023 and see how that sets the industry up for 2024. Read on to learn:

- Which Streaming shows and movies captured attention and engagement best in 2023
- How live sports continues to be a boon for broadcast networks (and how CTV sports viewing is emerging)
- The growth of ad supported tiers among premium apps
- Where CTV ads perform best

And of course, we touch upon the biggest sports and entertainment story of 2023: Taylor Swift and Travis Kelce.

Wishing everyone a happy holiday season and looking forward to another year of growth and innovation in television and advertising.



**Yan Liu**  
CEO of TVision



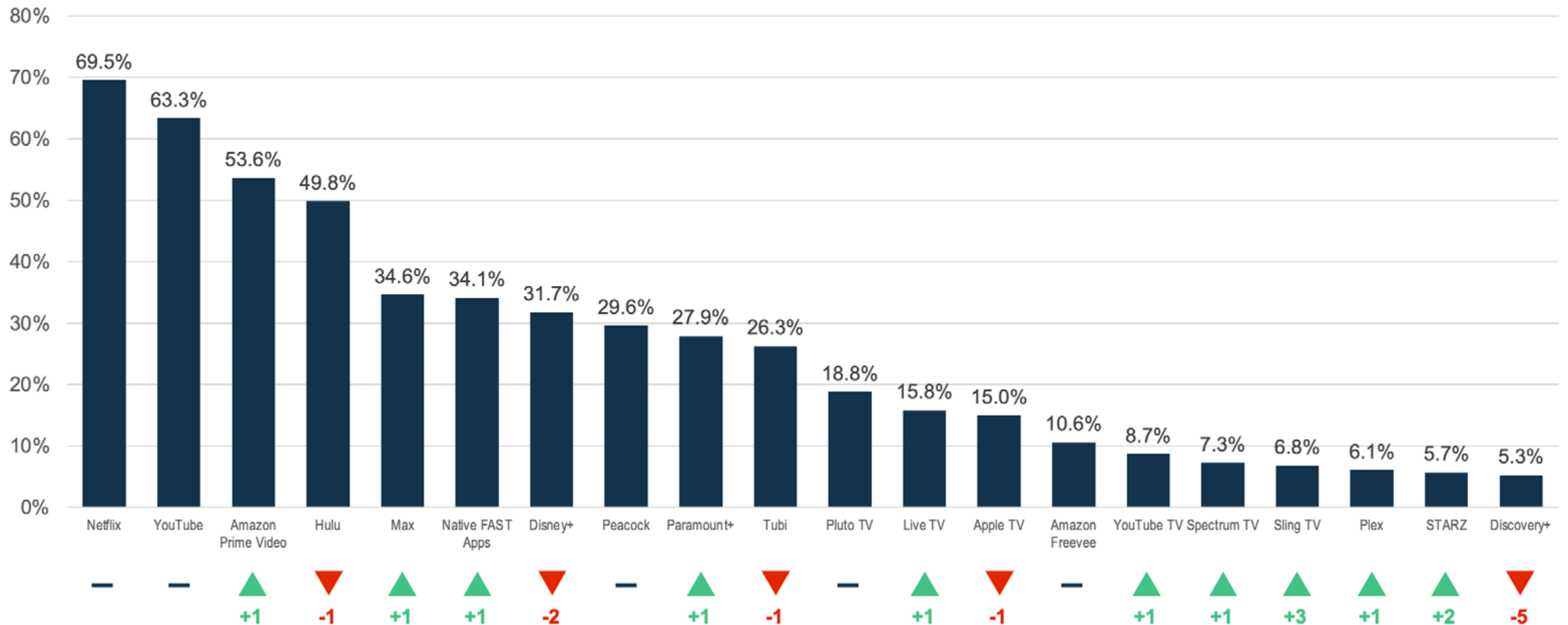
# Table of Contents

- 4 The Apps on American TVs
- 5 The Top Performers on the CTV Power Score, Shows and Movies for 2023
- 6 The Amount of Time Spent with CTV Live Sports is Increasing
- 7 Viewers Seek Out Apps That Deliver the Big Sports Moments
- 8 Viewers Pay More Attention to Ads in Live Sports on Linear
- 9 The Swift Effect
- 10 Apps See Lower Attention from Ad Supported Tiers, With Exceptions
- 11 Viewers Are Spending More Time with Ad Supported Subscriptions
- 12 On CTV The First Ad in Pod Gets Twice the Attention
- 13 About TVision
- 14 Methodology & Metrics

# The Apps on American TVs

While the average American household tunes into about seven apps, more than 25% of households tune into more than 10 apps. Netflix and YouTube hold a commanding lead in the category, with Amazon and Hulu also reaching approximately 50% of households.

**The Top 20 Apps for Household Reach in 2023**

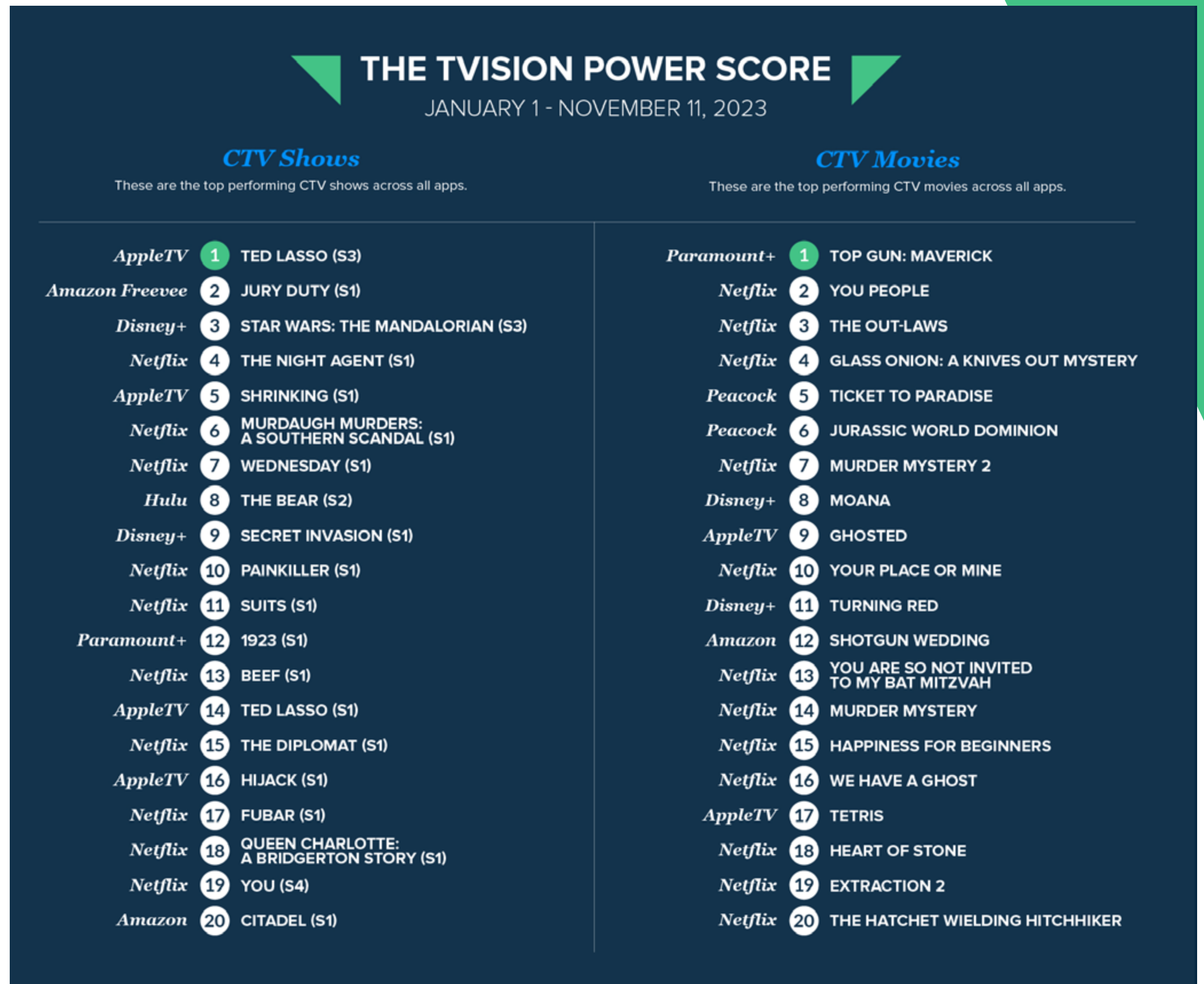


Source: TVision Panel (January 1, 2023 — November 11, 2023)

# The Top Performers on the CTV Power Score

## Shows & Movies for 2023

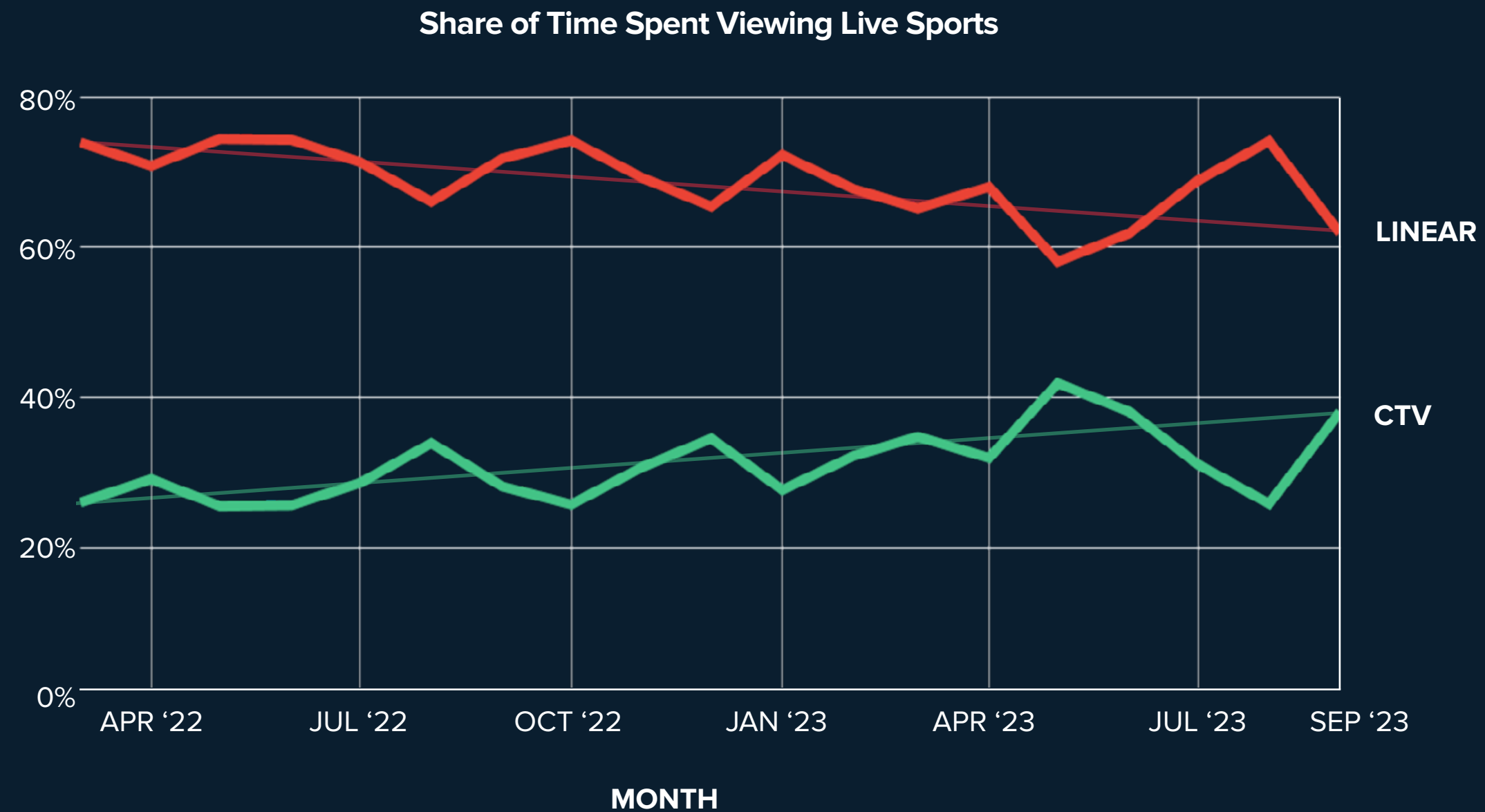
The TVision CTV Power Score is the best resource for understanding the CTV content that best engages audiences across all apps. Our scores are powered by TVision’s industry-leading CTV panel. Our analysis includes how viewers are engaging with content over hundreds of apps and thousands of programs. The TVision Power Score factors in four key metrics: the amount of time viewers pay attention to the program, the amount of program time available for the season, the program’s reach, as well as the application’s reach. This combination of metrics was chosen to enable a neutral look at the quality of programming and its unique, inherent ability to draw in viewers — regardless of the scale of the platform, or the program’s release schedule. These are the CTV Shows and Movies that best engaged audiences in 2023.” to “These are the most engaging CTV shows and movies of 2023.





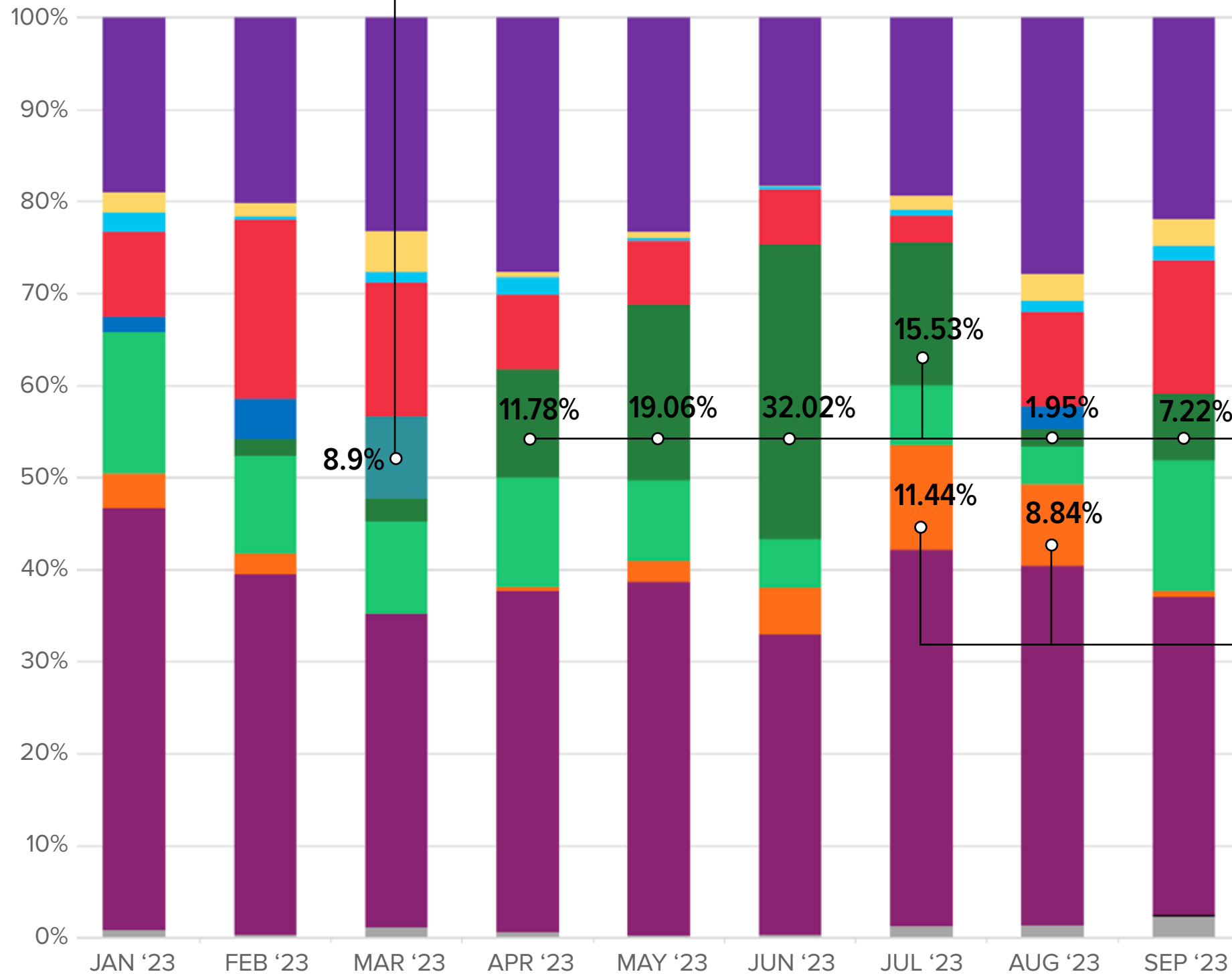
# The Amount of Time Spent with *CTV Live Sports Is Increasing*

While the majority of time spent viewing live sports occurs in linear environments, there is a growing trend of watching sports on CTV.





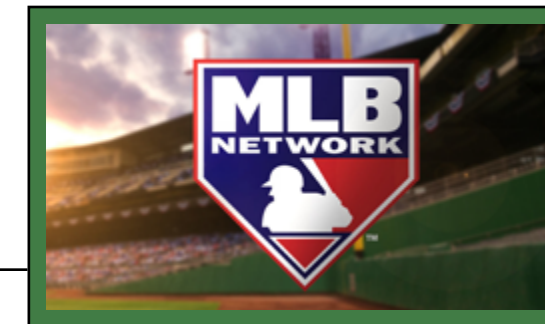
**MARCH MADNESS**  
NCAA MARCH MADNESS LIVE  
*March*



**Share of Time Spent Viewing Live Sports, by App**

# Viewers Seek Out Apps *That Deliver the Big Sports Moments*

We see seasonal spikes in time spent viewing sports for more niche apps. For example, time spent on Fubo spiked during the FIFA Women's World Cup. As one might expect, the March Madness app gained a significant share of time spent in March 2023, and MLB Network saw more viewing time in-season than out of season.



**MLB NETWORK**  
*April – September*



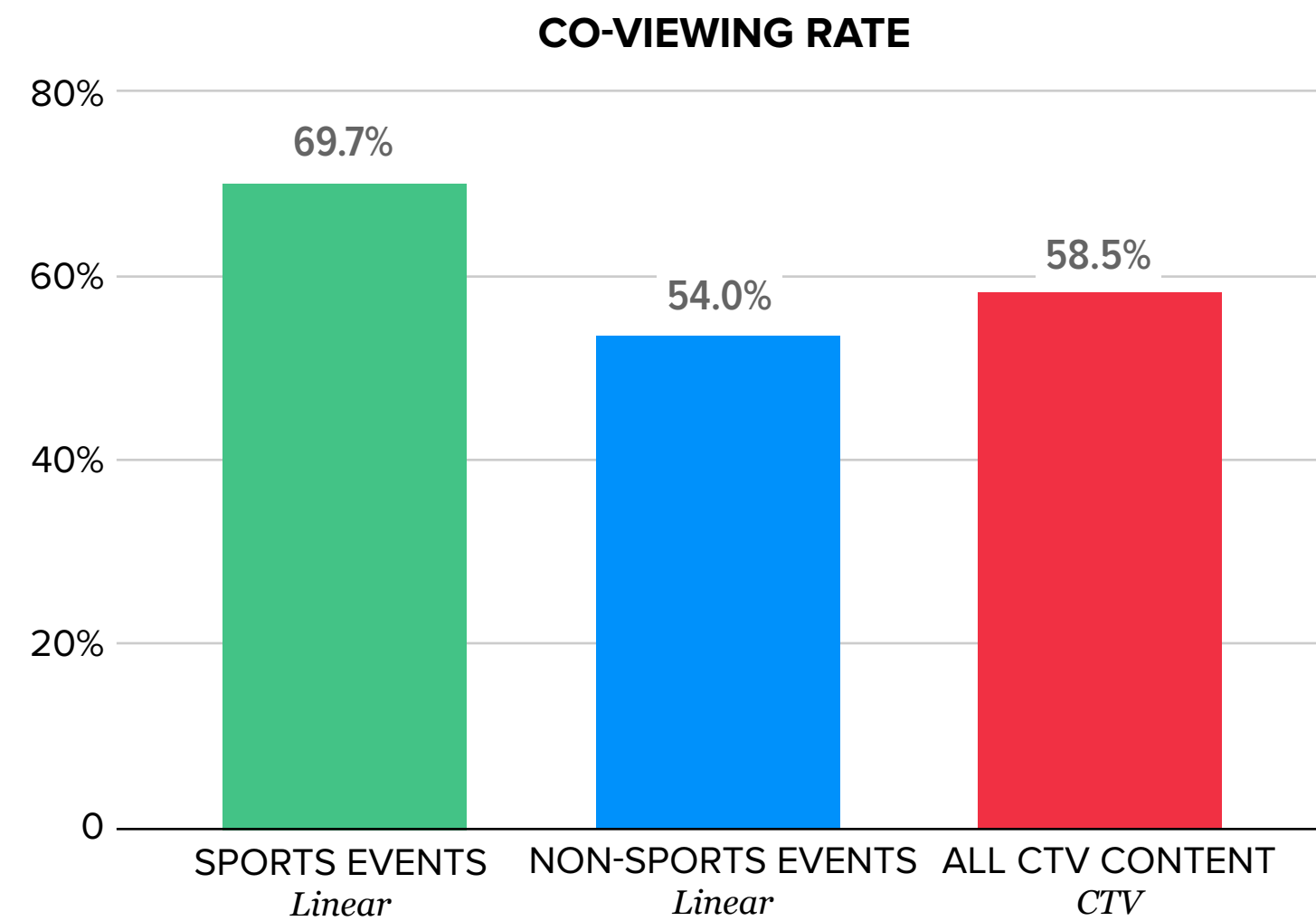
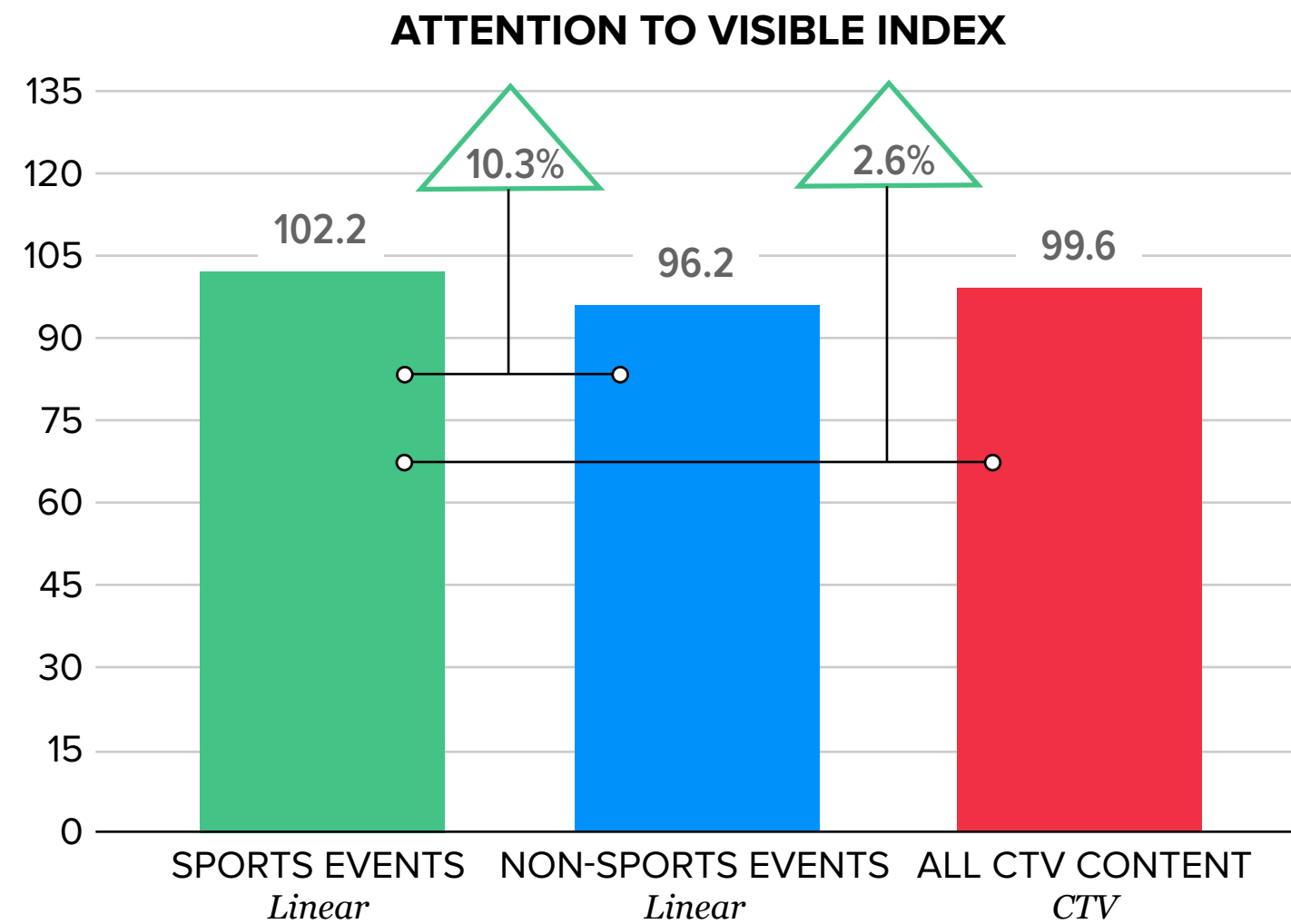
**FIFA WOMEN'S WORLD CUP**  
FUBO  
*July – August*

- Amazon Prime Video
- Apple TV
- YouTube TV
- Fubo
- Hulu
- MLB
- NFL
- NCAA March Madness Live
- Network Apps: (ESPN, NBC Sports, Fox Sports)
- Paramount+
- Peacock
- MVPD: (Xfinity, Spectrum TV, DirectTV)

# Viewers Pay More Attention to Ads in Live Sports

## *On Linear*

While it is true viewers are spending more time watching sports on CTV, the category remains one of the most valuable assets for linear television networks. In fact live sports is one of the most engaging opportunities for advertisers. Live sports on broadcast and cable networks outperform Linear non-sports events and all CTV programming for ad attention and co-viewing.

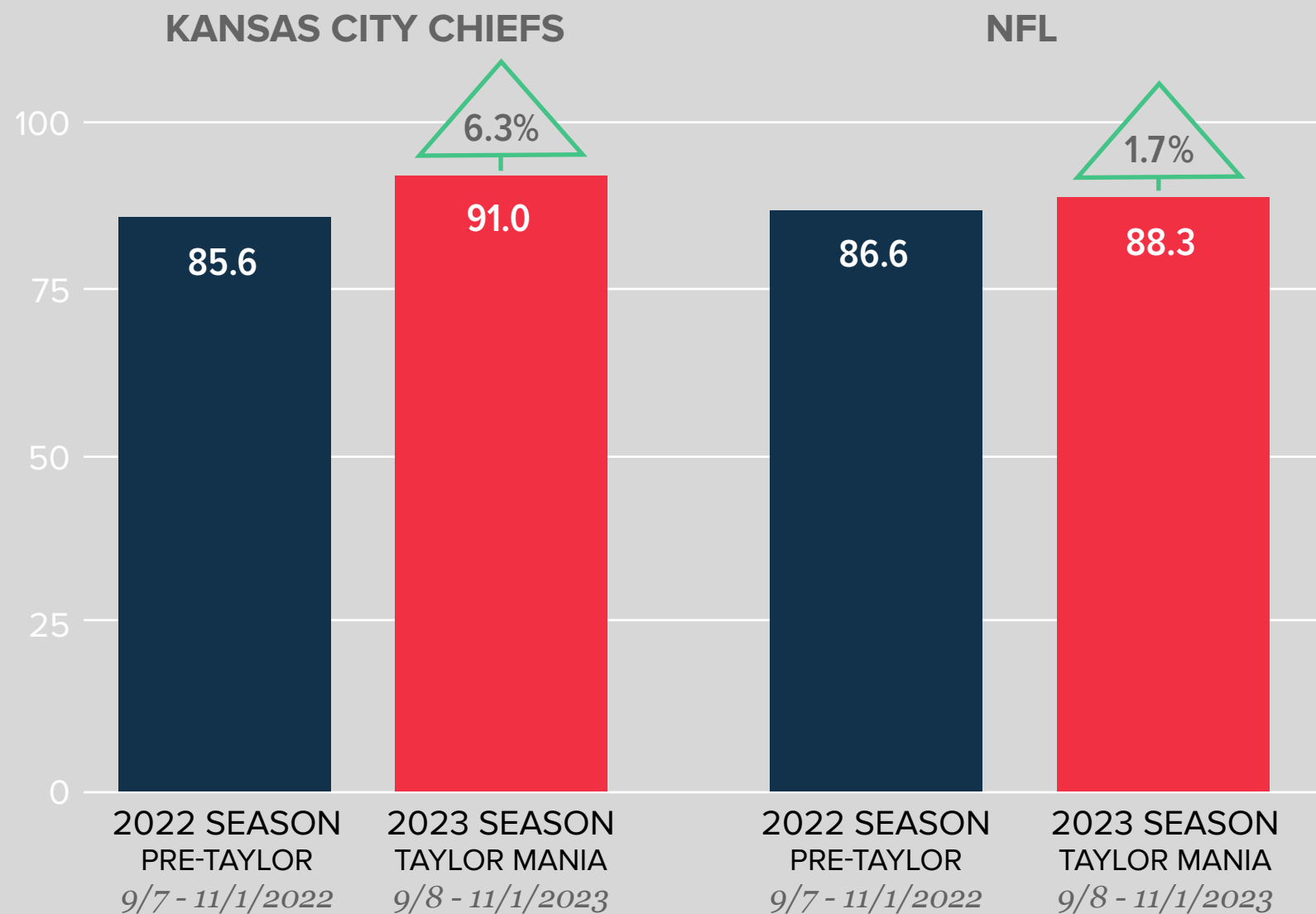




# The Swift Effect

In 2023 the biggest sports story of the year is playing out off the field (and in the premium suites instead). That's right, we are talking about Taylor Swift. We know that Travis Kelce jersey sales are up and the NFL has a host of new fans. But do those new fans translate into additional attention and opportunities for advertisers? TVision's attention data suggests yes! Attention is up to KC Chief's games and to NFL games in general, among female viewers.

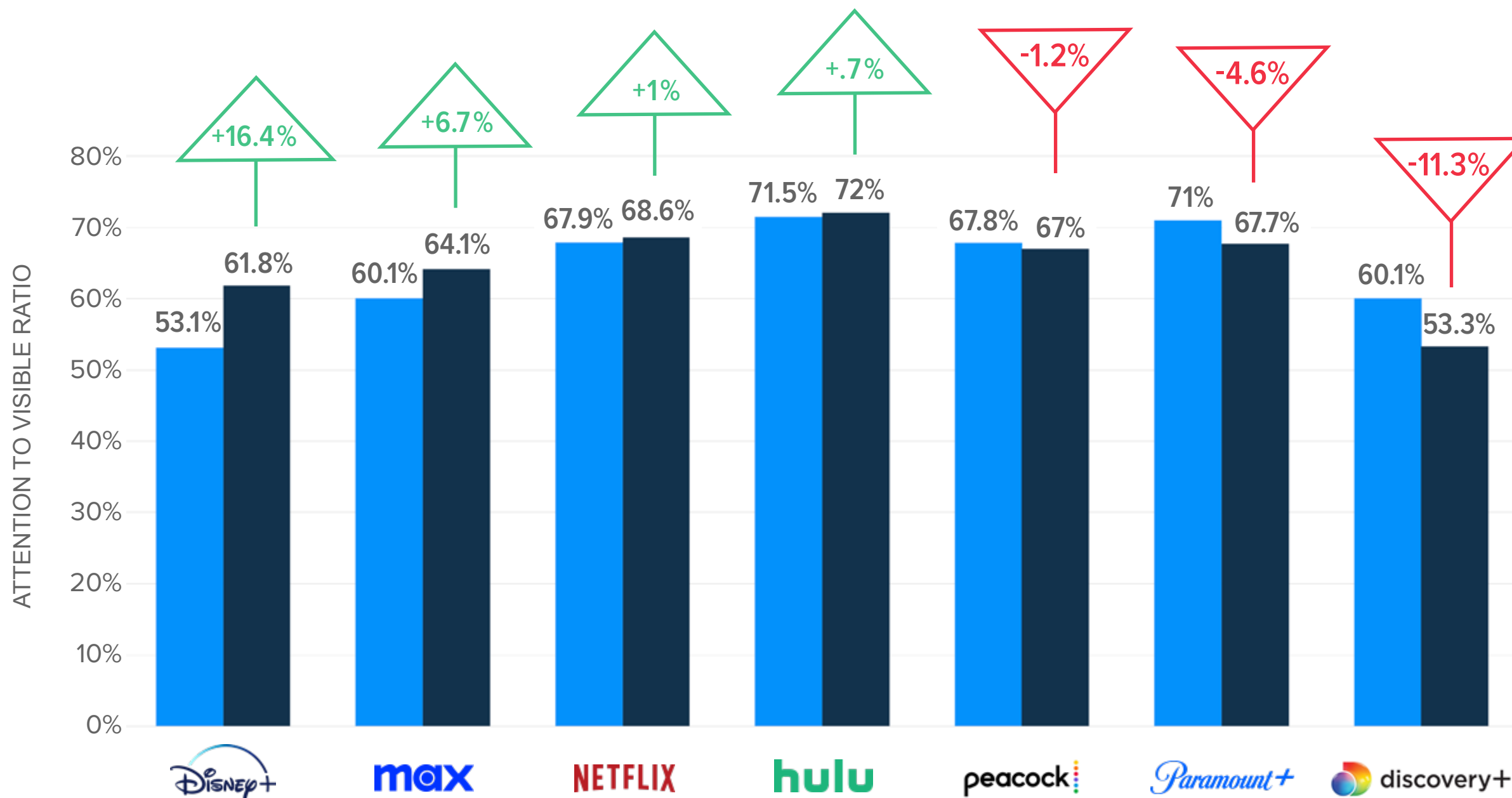
## FEMALE VIEWERS ARE PAYING MORE ATTENTION: *Does the NFL have Taylor Swift to thank?*



# Apps see Higher Attention from Ad-Free Tiers

## *With Exceptions*

**PREMIUM VS AD SUPPORTED CTV VIEWER ATTENTION**

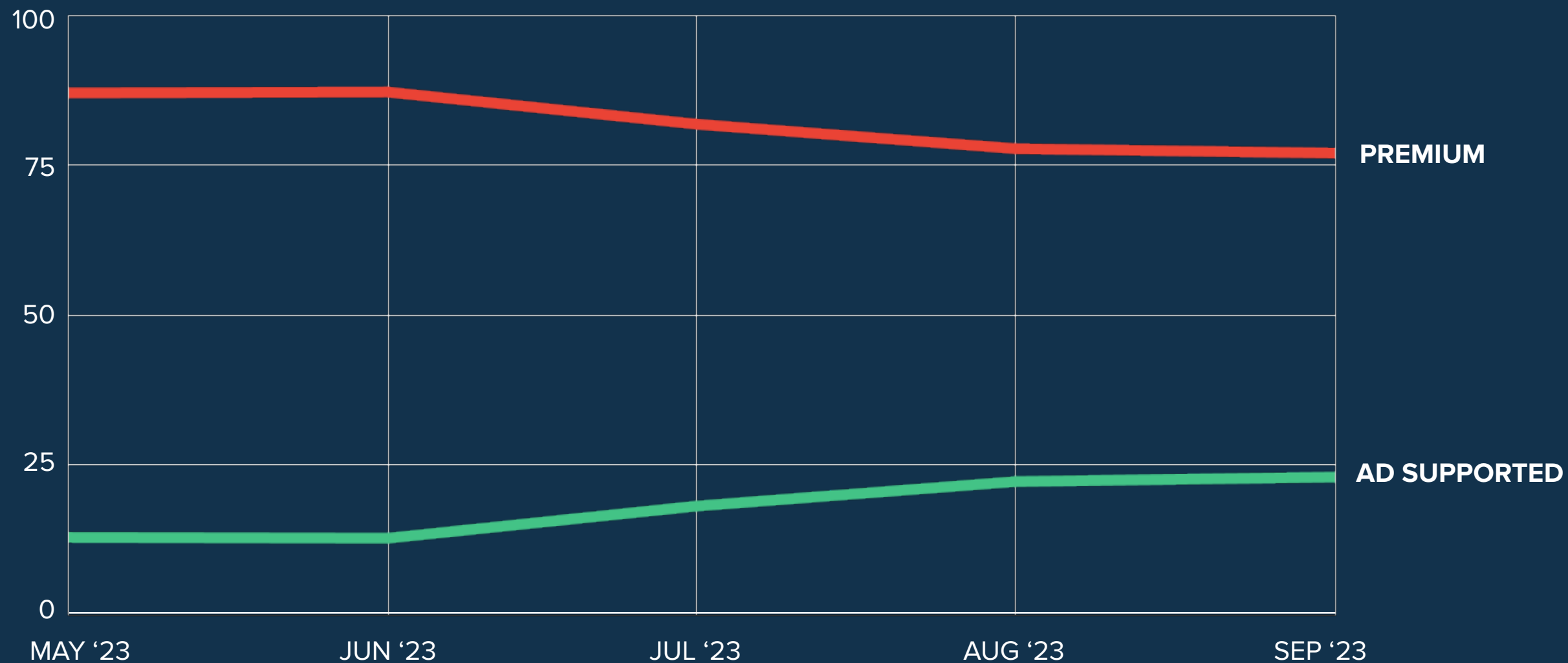


In general, CTV ads capture less attention than programming. Also true is that, in general, premium (ad free) app subscribers pay more attention to all content than viewers who are on the ad-supported tier. However, we do see that apps with a legacy linear history, such as Peacock and Paramount+ are managing to capture more attention from their subscribers who are on the ad-supported model. This may be because of the ad-break format they have deployed, viewer expectations for ads with this content, or other factors.

■ Ad-Supported HH Tier  
■ Premium HH Tier  
▲ % Difference: Premium HH vs. Ad Free HH  
▼

# Viewers are Spending More Time with *Ad Supported Subscriptions*

## SHARE OF TIME SPENT WITH SUBSCRIPTION TIERS



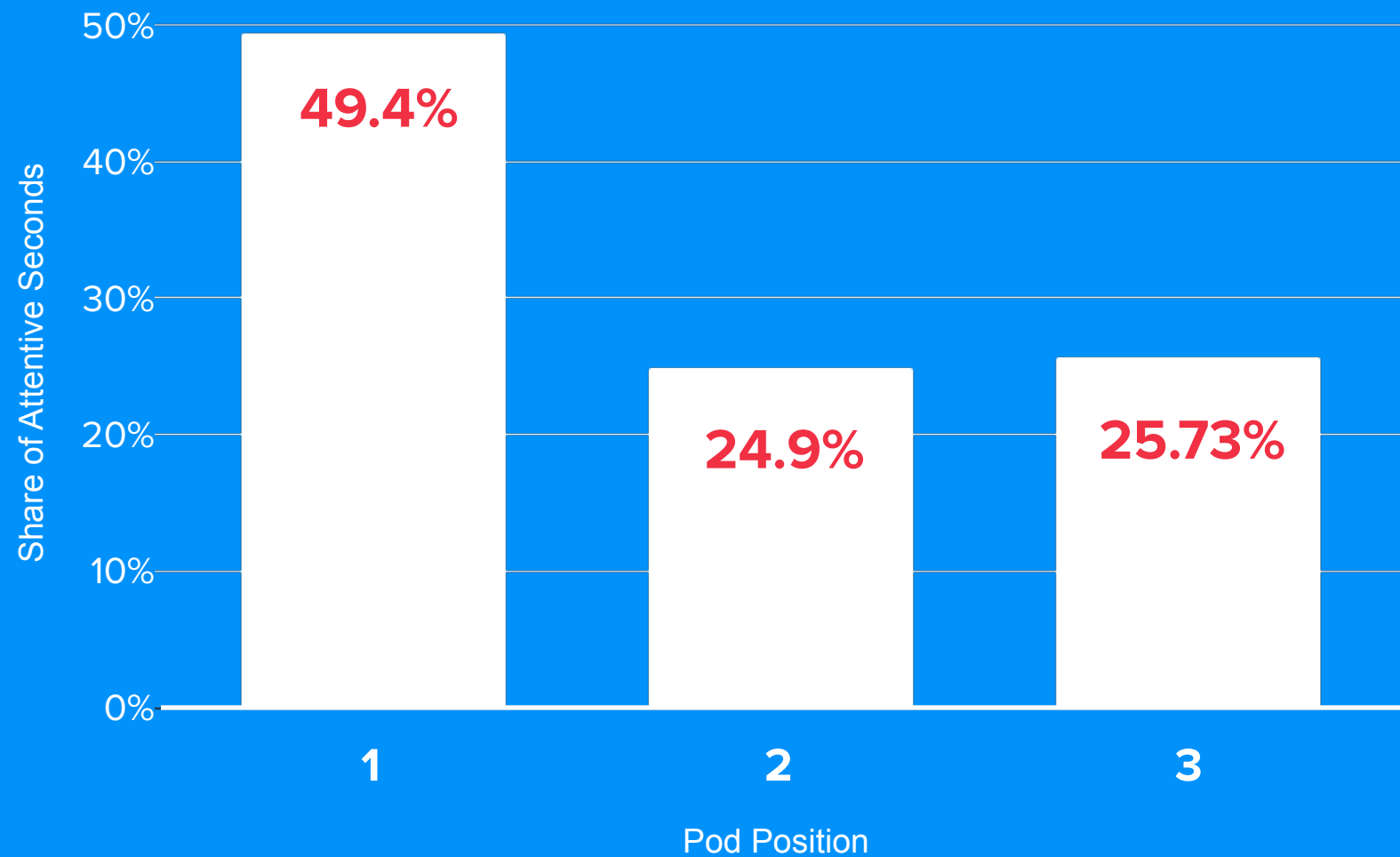
As more legacy ad-free streaming services have rolled out ad tiers, we have seen an increase in viewer share of time spent within ad-supported models. This suggests that ad-supported tiers are increasing in popularity and streaming viewers are becoming more receptive to CTV advertising. In turn this creates more opportunity for advertisers to reach hard to find CTV viewers.



## SHARE OF ATTENTIVE SECONDS FOR CTV AD PODS

### *Ad Time Only*

MAR 14 - SEP 7, 2023



## On CTV The First Ad in Pod Gets Twice the Attention

Just like in linear TV, where an ad appears in a pod can impact the ad's ability to capture attention. On CTV, this is especially true. The first ad in any ad pod commands almost half of the attentive seconds of the entire ad break. This could be because many apps let viewers know how many ads to expect, and exactly when to expect the programming to begin again. Viewers catch the first several seconds of the first ad before giving their attention elsewhere. The small bump in attention for the last ad in the pod could be attributable to viewers getting ready to re-engage with content.

# About TVision

## *The Leader in TV Engagement Metrics*

TVision measures what was once unmeasurable — how people really watch TV. Using cutting-edge computer vision technology, only TVision measures person-level, second-by-second TV engagement. Marketers and media seller's access TVision's TV performance metrics via its software-as-a-service platform. TVision's customers include some of the largest brands in the world, top media networks, and CTV applications. TVision's single-source panel enables measurement across both Linear TV and CTV, providing critical metrics such as Attention, Viewer Presence, Co-Viewing, and more.

*Visit us at [www.tvisioninsights.com](http://www.tvisioninsights.com)*



# Methodology & Metrics

TVision measures Presence-In-Room and Attention for every second of programming and advertising on television. Every time a person walks into the room, our technology detects who the viewer is, where they are in the room, and what their eyes are looking at. We do all this without personally identifying individual users, and without transmitting any images or videos. TVision's data is collected from an opt-in panel of 5,000 homes across the United States and weighted to represent the country. Linear and CTV ad impressions data in this report is from January 1 – November 11, 2023, unless otherwise indicated.

## Attention Index

Measures the average amount of seconds that viewers engage with an ad or program

## Attention (%)

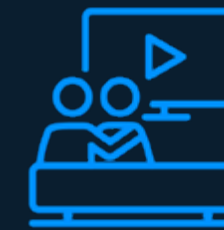
Measures the percentage of ad impressions where a viewer was watching the TV screen for two or more seconds

## Co-Viewing Rate (%)

Measures the proportion of episode or app views that occur with another viewer present for 5 or more minutes

## Share of Time Spent

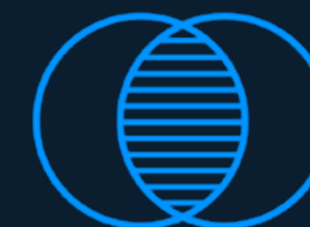
Compares the amount of time spent viewing the app or program



*Accurate Co-Viewing Multiples & Campaign Demo Reporting —*  
including walled gardens



*Eyes-on-Screen Attention Measurement*  
across all CTV apps in your campaign



*Incremental Reach*  
trends for your brand on linear, CTV,  
and YouTube CTV properties