

US Media Consumption Report

2021

BiG ViLLAGE



Introduction

In a climate where change is the only constant, marketers are scrambling to truly identify and reach the right consumer at the right time. As networks continue to bring great relevant content and new platforms and subscription services provide new ways to distribute content, there is a significant opportunity to provide a big impact on the way marketing and advertising programs reach their target - by using data driven consumer audience profiles that allow for insights and automation to deliver a precise understanding that make a good match between an ad and relevant content.

Getting your ad in front of the audience at the right place and at the right time makes the desired audience more likely to engage, recall and react favorably to a message.

Big Village's Audience Intelligence dashboard captures total audience behavior across several media channels including CTV (Connected TV), TV, radio, podcasts, newspapers, magazines, social and websites. The platform provides comprehensive reporting with KPIs such as reach, time spent, frequency, and the interests and values of your target audience. Big Village's Audiences facilitate more precise targeting by using research (rather than inference) to identify the digital behaviors that are most indicative of audience membership. It explores what media consumption behaviors and trends currently look like, providing a clearer picture of where to find your specific target audience segments, consumers, and clients, to drive business growth through 2021 and beyond.

So how are Americans consuming their media? What channels are most popular? What should your media mix look like as you start planning for 2022? Big Village's Media Consumption Report provides these answers, and more, based on the latest findings from our Audience Intelligence platform. Big Village builds audiences by combining self-reported attitudes, sentiments, or intentions via surveys with digital behavioral data. Machine learning is used to identify behaviors that most effectively connect those attitudes, sentiments, or intentions. Combining stated, self-reported behavior with digital behavior in this way allows us to create predictive algorithms that then accurately predict brand consideration, purchase intent and future behavior in the wild with more precision than audiences built through conventional judgement.



US Media Consumption

An overview

In the U.S., consumers reported daily usage of TV and websites. TV advertising continues to be an effective channel to build brands. Approximately 40% of consumers reported that TV has the best performing ads regarding attention, ad recall, frequency, and relevancy. In comparison, one-quarter (27%) of consumers reported that they found the most informative ads on websites in comparison to other platforms, aside from TV. Almost 9 of 10 (89%) consumers found ads on social media to be relevant. Consumers found social ads to be the second most interesting after TV. 9 of 10 consumers have reported reading a digital or print magazine, and 10% of respondents felt these ads were informative and helped increase awareness. 77% of consumers reported listening to the radio, and 13% of radio users reported that they found ad served on the channel to be annoying. Just more than half of all consumers read the newspaper via digital and print, and 7% of consumers found the ads they came across to be informative. An emerging media channel is podcasts - at least 38% of consumers reported listening to podcasts, and 6% of these consumers believed they came across interesting and relatable ads when listening to podcasts.

Gen Z & Millennials use TV, social, and websites on a daily basis, while podcasts are an emerging platform among this group. Gen X reported daily TV and website usage, but do not engage with social or podcasts as much. Baby Boomers skew more towards traditional methods of media such as radio, magazine, and newspaper vs any other generational group.

Adults 18+, in the US are most interested in music, travel, nature, cooking, history and shopping. These consumers are open to being pioneers and being the first to try new things but also don't mind looking to others for ideas and inspiration. Some of the most important values to these consumers are the following honesty (91%), enjoying life (88%), family (87%), personal responsibility (85%), and the freedom of expression (80%).

Approximately 40% of consumers reported that **TV has the best performing ads** regarding attention, ad recall, frequency, and relevancy.

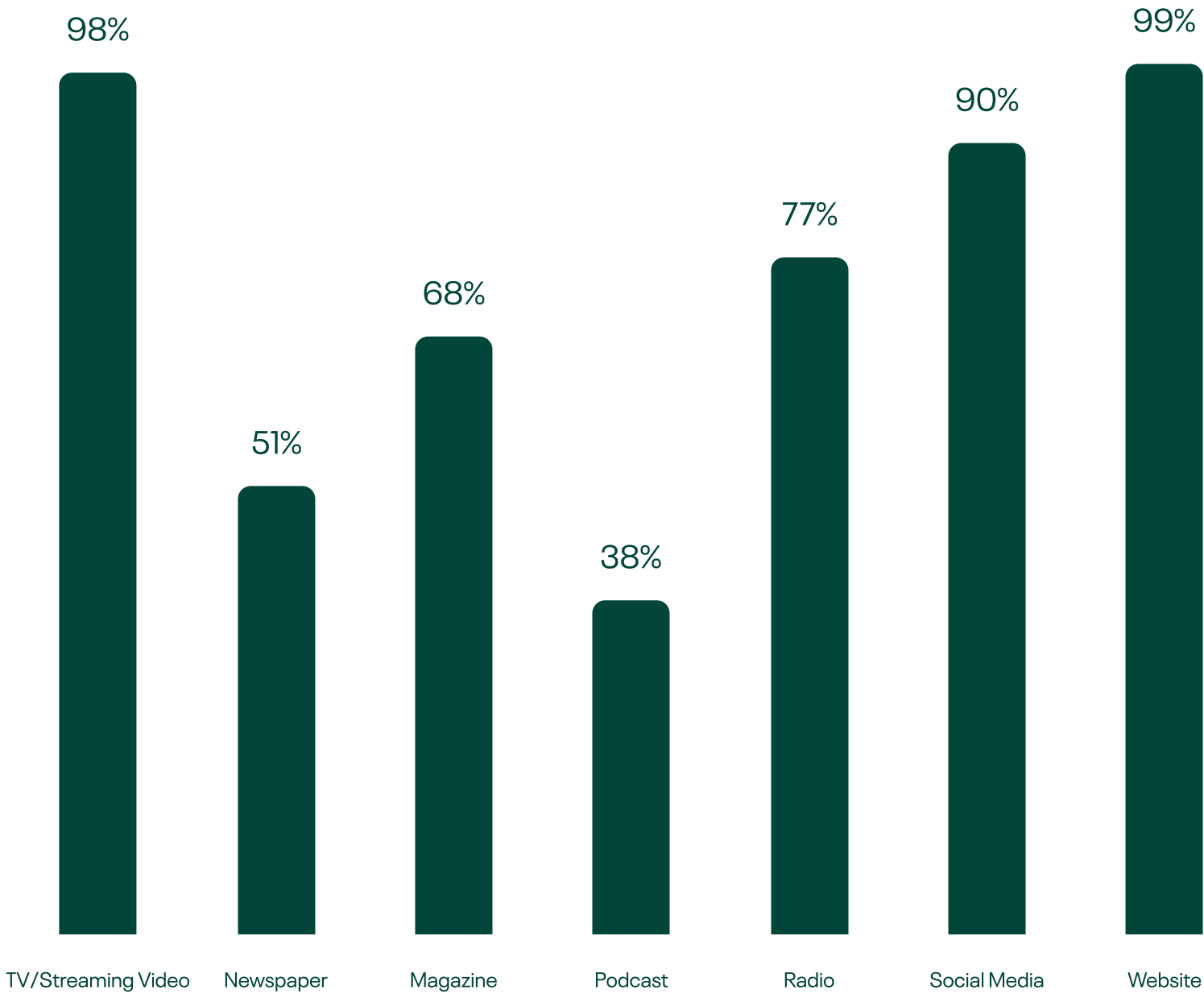
Who is consuming what and when?

TV

On average, US Adults 18+ are watching 31.7 hours of television per week. During the weekdays (Monday – Friday) consumers spend about 21.5 hours watching TV. US adults 18+ typically start the weekday off watching news from around 5 -10AM, before they begin the workday, and again around midday 3-5PM. On the weekend, consumers spend about 10.2 hours watching TV. Consumers typically start the weekend off from 7-10 AM watching news, followed by the midday sports take over that can last till midnight. However, after 7PM and later consumers start to watch entertainment content. Drama shows, crime/detective shows, sitcoms/comedy shows, and news were the most watched genres throughout the entire week.

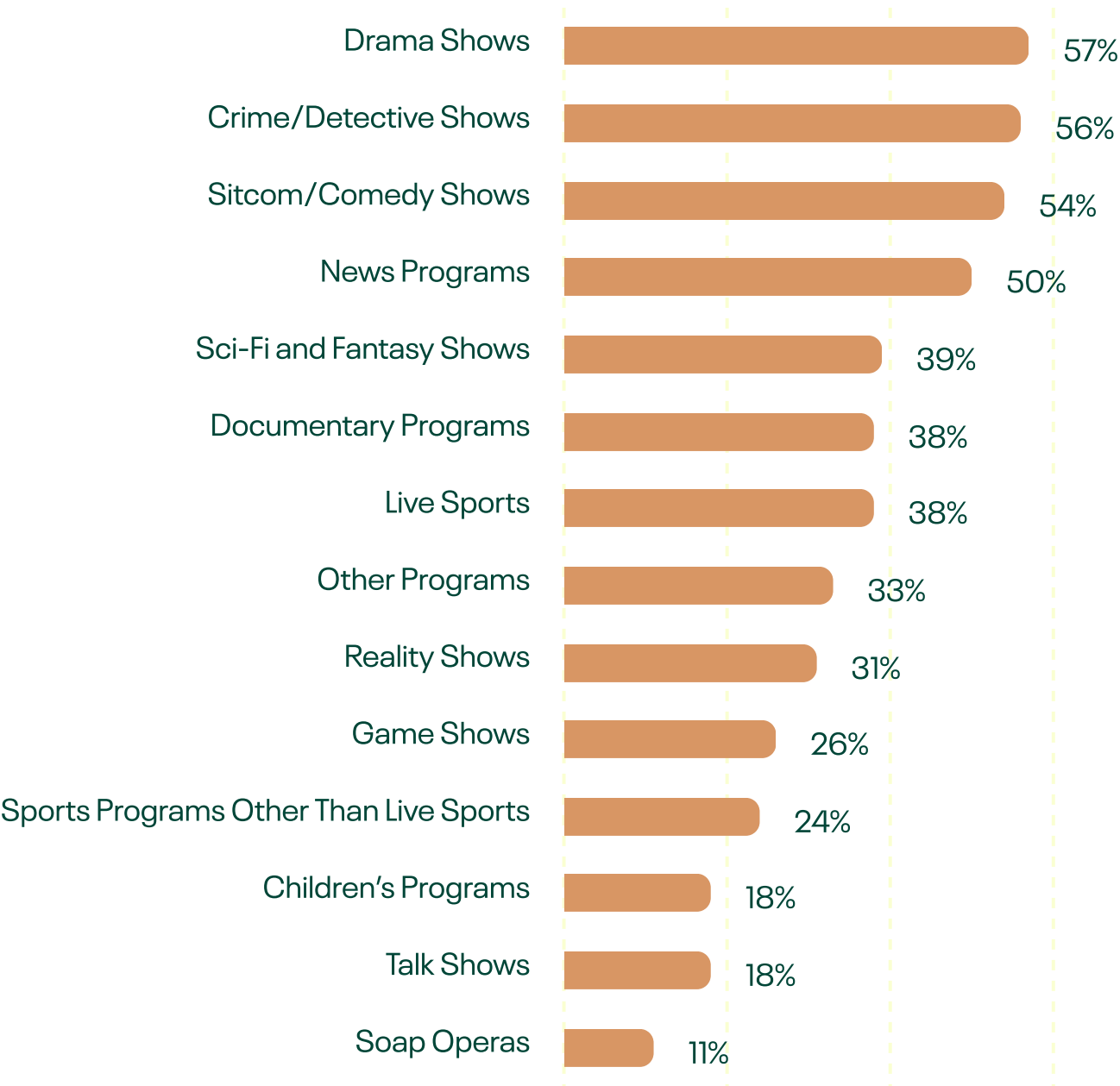
Gen Z consumers typically spend 26 hours a week watching television, **about 5.6 hours less than the average US Adult.**

Media summary
MEDIA CHANNEL USAGE



Genres watched most often

TOTAL WEEK



Gen Z consumers

typically spend 26 hours a week watching television, about 5.6 hours less than the average US Adult. These consumers enjoy watching comedy, crime, and drama shows. They over index on all streaming video services such as Amazon Prime, Apple+, Disney+, Netflix, HBO, Hulu, and YouTube. Gen Z consumers use gaming consoles, mobile phones, computers, tablets, and smart TVs to stream content. These consumers watch live TV at least once a week.

Millennials spend

close to 29.4 hours a week watching TV, just 2 hours fewer than the average US adult. They also use apps such as Apple TV, Disney+, YouTube TV, Hulu, and ESPN+ to stream content. These consumers skew towards using strictly CTV devices such as mobile phones, tablets, computers, gaming consoles, Amazon Fire sticks, and smart TVs.

Gen X spends

about 31.5 hours watching TV per week, which is just about the same amount of time the average US adults spends watching video content. These users subscribe to streaming video on demand services such as HBO, Amazon Prime, Netflix, and Disney+. Gen X consumers use their tablets/iPads, smart TVs, mobile phones, Amazon Fire sticks and Roku streaming sticks to stream content. These consumers watch live TV everyday through either a paid streaming subscription service or free streaming service.

On average Baby Boomers

spend the most amount of time watching news on television, spending more than 35 hours a week watching TV, 3 more hours than the average American. Peak viewing time for Baby Boomers to engage with news programs is from 7 to 10AM & 5 to 7PM on the weekday or weekend. Baby Boomers are traditionally using non-smart TVs with traditional cable boxes. These users watch live TV every day.

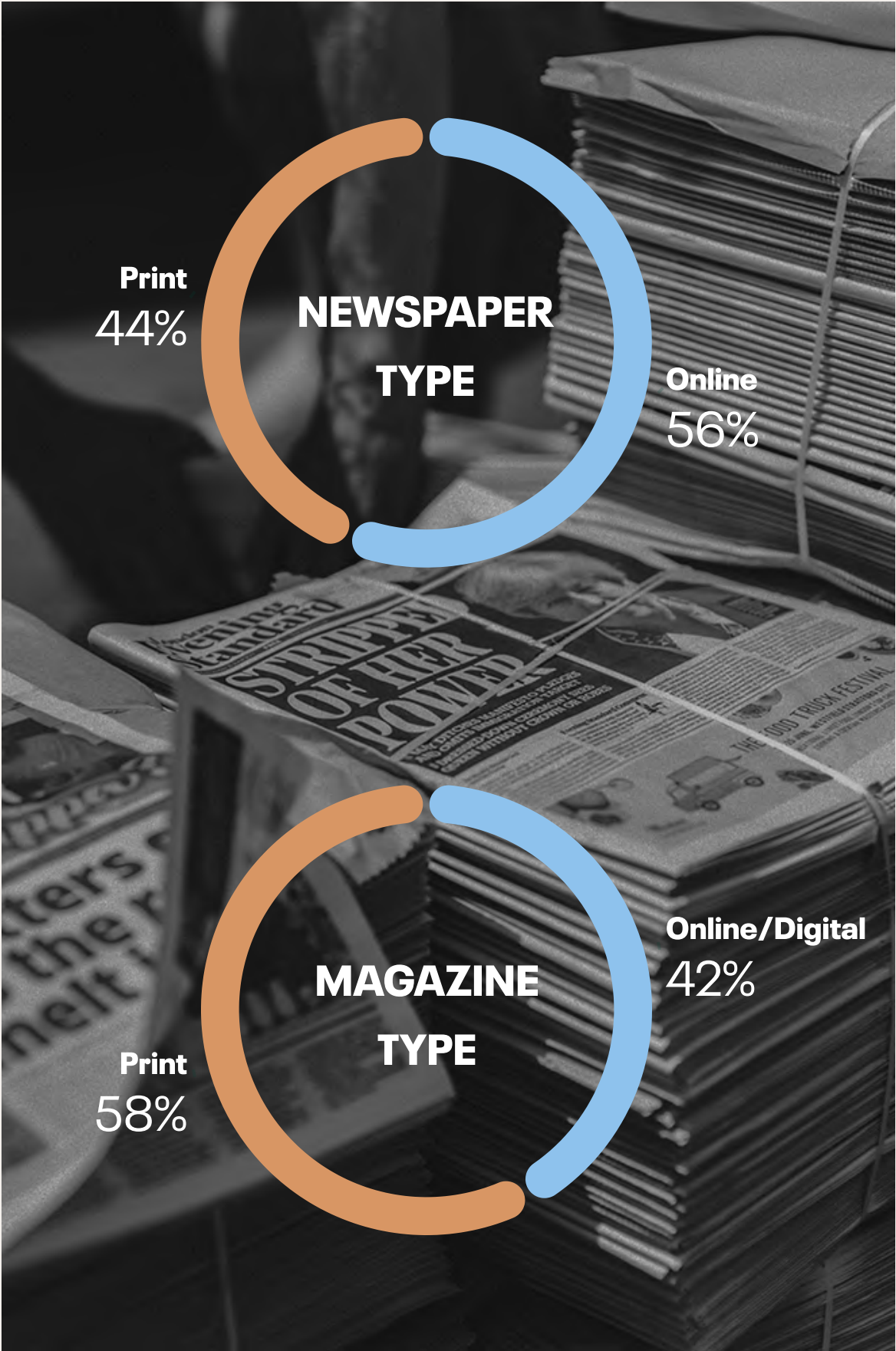
Newspaper

51% of US Adults 18+ still read the newspaper, whether online or in print. More than half get their newspaper content in a digital format, while 44% of consumer continue to read the traditional print format. During the week, consumers typically spend 4 of 5 days out of the week reading the newspaper. The top 5 most popular news sections are the local news, national news, world news, sports, and business. Usage during the weekend typically decreases. USA Today, the New York Times, and Wall Street Journal were the top print formats. The top five most visited digital Newspaper brands were The New York Times, USA Today, Washington Post, Wall Street Journal, and New York Post.

Many Gen Z consumers skew towards the fashion section of the newspaper, while Millennials are into both fashion and auto. Gen X and Baby Boomers use the newspaper most frequently, reporting usage of 4 – 5 days per week. They use the newspapers to keep up to date with the local news, sports, and lifestyle/travel. Baby boomers over index on print formats of newspapers.

Magazines

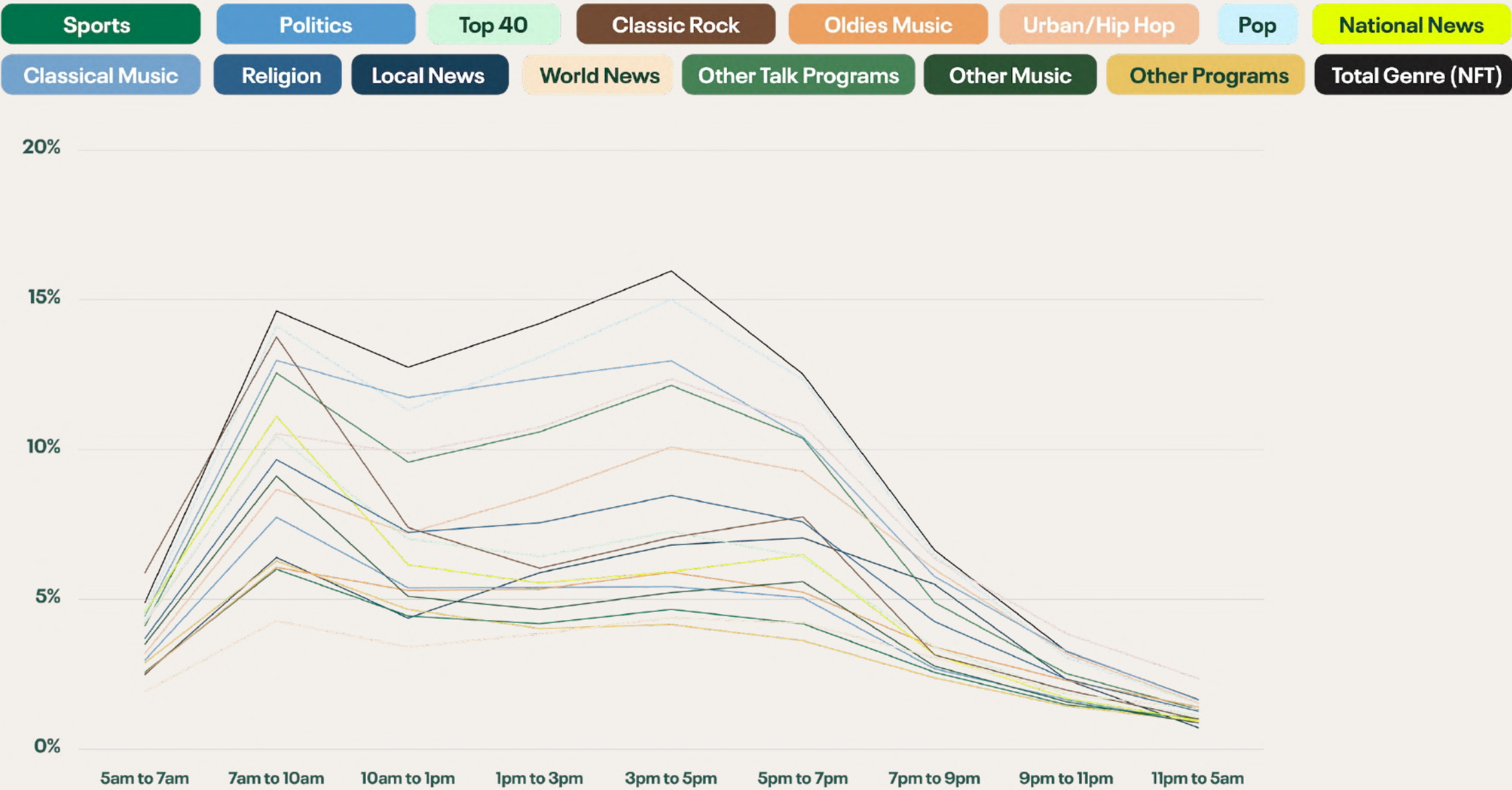
68% of adults 18+ read print or online magazines. The top categories for magazines are cooking/food, entertainment, special interest, home/garden/family and health & wellness. Some of the top publications among consumers are National Geographic, All Recipes, Forbes, Food & Wine. 42% of consumers who read magazines do so in an online/digital format. 58% of all consumers who read magazines still read print formats. The top print magazine publications are National Geographic and Food Network Magazine. Baby Boomers lead the way with 72% reading magazines and 70% of readers preferring print formats. 66% of Gen Z, Millennials, and Gen X typically read fashion/beauty, business science technology and sports magazines. These readers typically consume magazine content online.



Radio

US adults 18+ are spending approximately 7.3 hours listening to the radio per week. Some of the top genres they listen to throughout the week are urban/hip hop, pop, rock, top 40, and sports. Whether it's a weekday or the weekend, consumers have their minds made up when it comes to listening to their favorite music or radio stations. Consumers typically start off the work week listening to the radio from 7-10AM, and usage picks back up again from 3-9PM. During the weekend radio starts a bit later around 10AM, and peaks from 1-5PM. Gen Z consumers spend about 5 hours per week listening to the radio. The top genres they listen to are hip hop, pop, and public radio. Millennials and Baby Boomers spend about 7 hours per week listening to the radio. Gen X spends the most amount of time listening to radio, with 8.6 hours. They typically tune into the Top 40, classic rock, and pop music. Peak usage for this group is from 7-10AM & 3- 5PM during the week and during the weekend peak usage is anywhere from 1-5pm.

Work week listening by genre
MEDIA CHANNEL USAGE

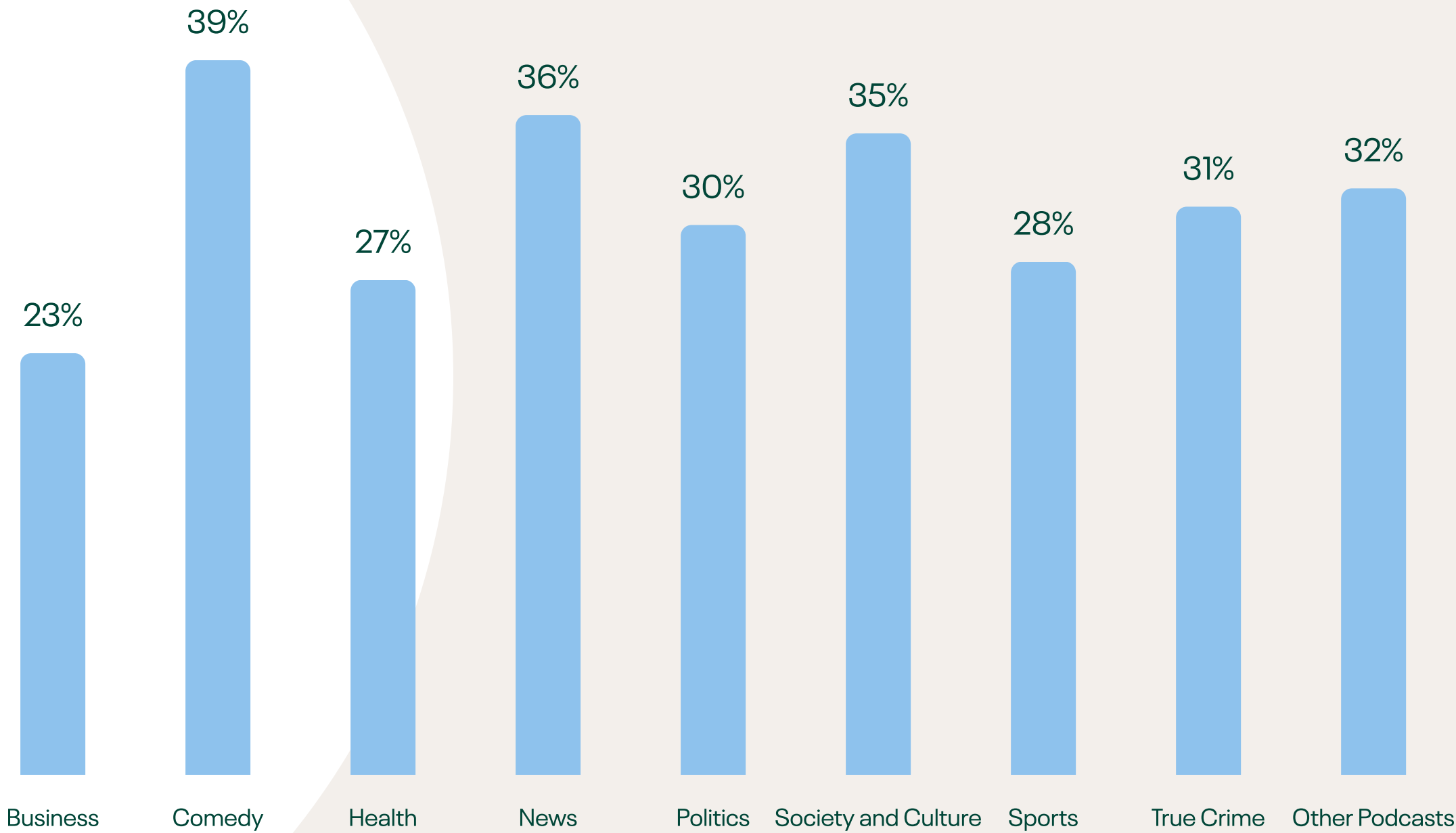


Podcasts

US adults 18+ spend approximately 2 hours listening to podcasts per week. The top apps that consumers are using to listen to podcasts such as Spotify, Apple, Audible, and Podbean. Gen Z & Millennials typically spend about 3 hours a week listening to podcasts. Some of the top genres that consumers are listening to are comedy, true crime, culture, business, health, and sports. Gen X spends just under 2 hours listening to podcasts, and they typically tune into sports, news, and crime. Baby Boomers spend less than an hour listening to podcasts, however when they do, they tune in for politics.



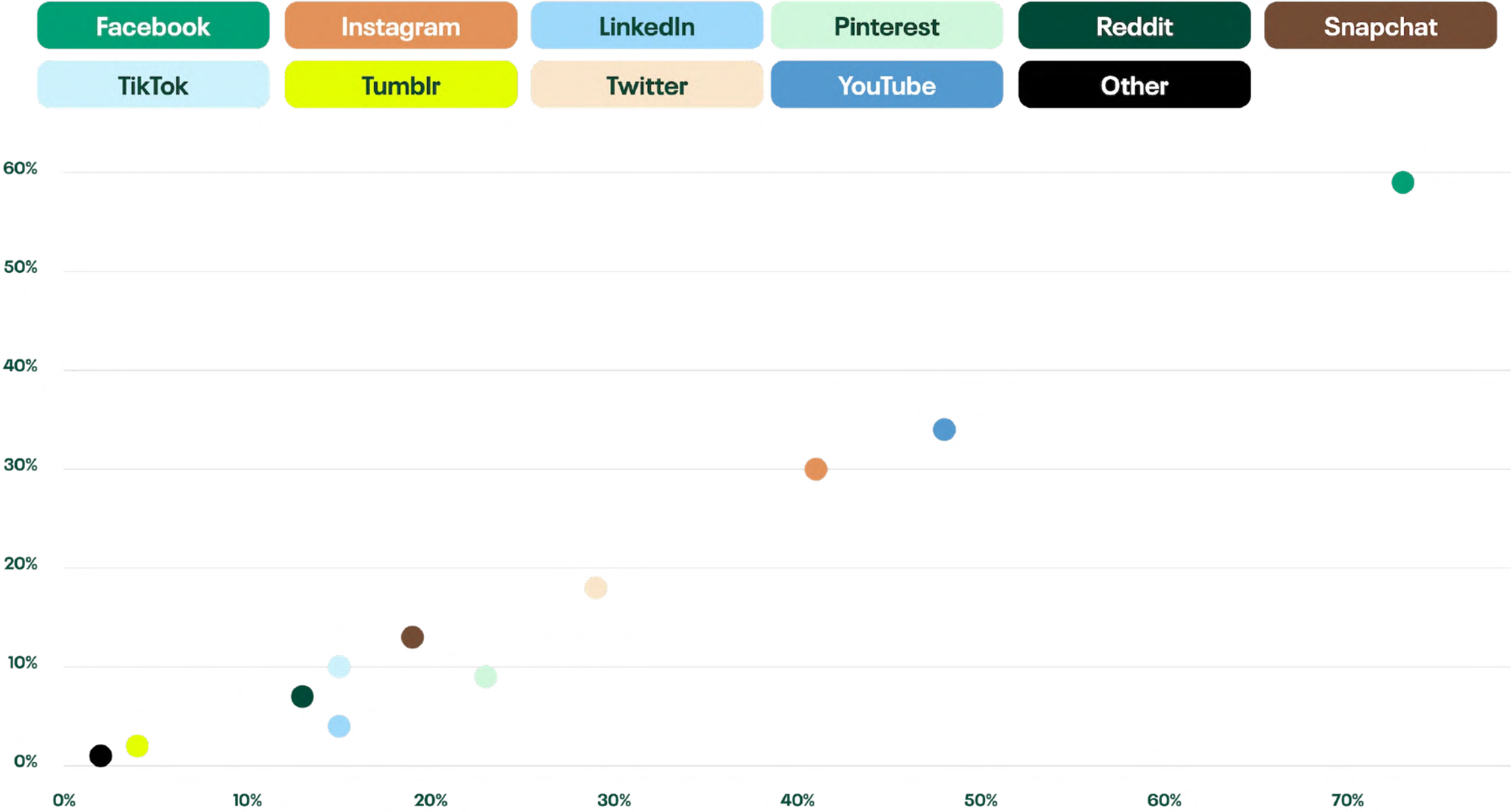
TOP GENRES





Social media

65% of US adults use social media daily. Some of the top platforms are Facebook, YouTube, Instagram, Twitter, Pinterest, and TikTok. Heavy social media users also reported using Reddit, Snapchat, Twitter, and LinkedIn. 89% of Gen Z and Millennials use social media daily, with Instagram, Twitter, TikTok, Snapchat, and Reddit as some of the most used platforms. 81% of Gen X use social media daily. 66% of Baby Boomers use social media daily, and they typically use Facebook and LinkedIn.



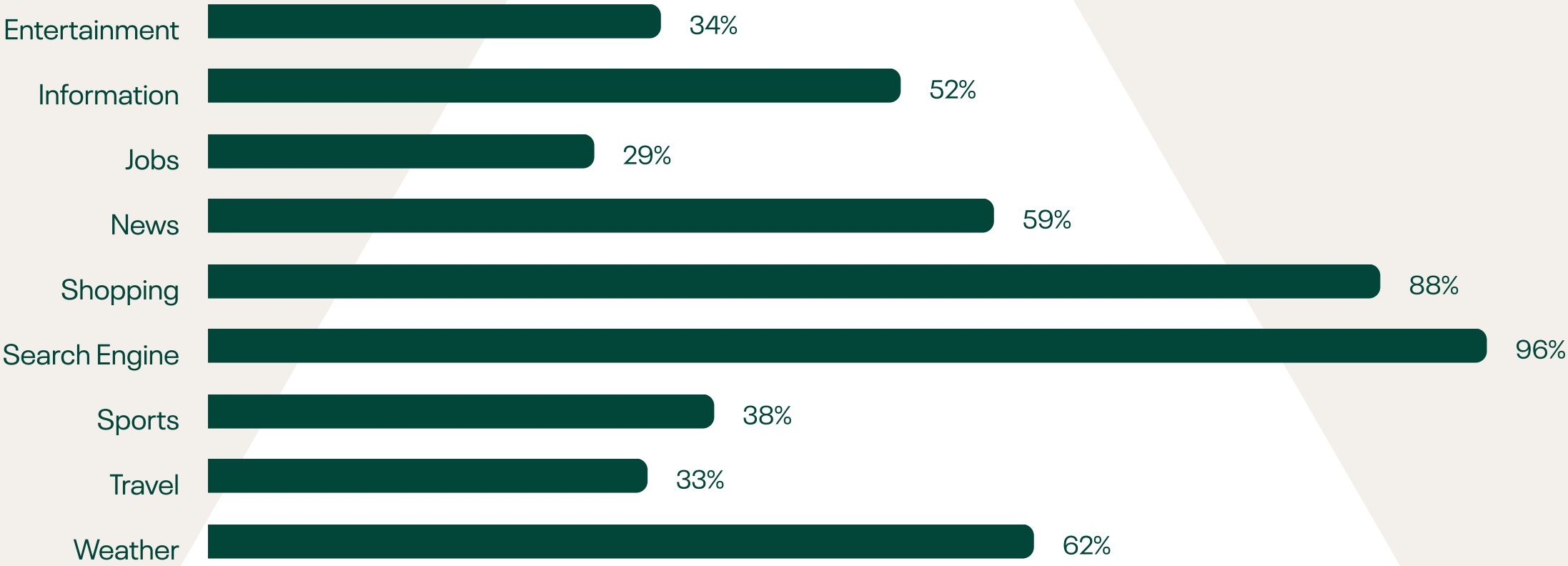
Websites

On average US adults 18+ are visiting approximately 8 to 9 websites a day. Some of the top website categories that consumer visits are search engines, shopping, news, information, sports, travel, and jobs. For entertainment, consumers typically visit IMBD.com, Disney.com, ABC.com, CBS.com, and Fox.com. For information, consumers primarily visit Wikipedia and WebMD. For job searches, most consumers use Indeed.com. Consumers visited CNN, FOX, ABC, CBS, and NBC for their news content. Approximately 80% of consumers shop on Amazon, 45% shop on Walmart, and 27% shop on eBay. The top 3 search engines consumers used were Google (88%), Yahoo (22%), and Bing (19%). For sports, consumers visited ESPN the most followed by NFL, NBA, MLB, and CBS. When consumers are looking into travel, they typically use the following sites: Expedia (14%), Hotels.com (11%), Airbnb (10%) and Trip Advisor (10%).

Gen Z and Millennials typically average about 10 sites or more a day. The website categories they typically view are for jobs, entertainment, travel, and sports. Gen X consumers visit about 9 sites a day, while Baby Boomers spend the least amount of time online, visiting 7 or less websites, which are typically search engines, news, shopping, and weather websites.

Website categories

USAGE



Approximately **80% of consumers shop on Amazon**, 45% shop on Walmart, and 27% shop on eBay.

What should my
media mix look like?

Heading into 2022

During the past year, streaming video on-demand has seen a surge in usage as Netflix, Amazon, Disney+, and HBOMax have increased the total amount of subscribers and the amount of total time spent watching TV in general. Big Village also saw an increase in advertising video on demand platform usage such as Hulu, Peacock, CBS, and YouTube TV. In order to effectively reach your target consumer, also consider some of the top network and channels that consumers typically engage with most often such as ABC, CBS, NBC, FOX, ESPN, and CNN.

Consumers watch TV in many ways, and 39% of consumers still utilize traditional cable. Phones (38%), computer/laptops (35%), and tablets (24%) are also quite common methods of watching TV. Brands should be considering ads on all devices to reach their consumers and build brand awareness. Big Village has also seen an increase in CTV devices. 68% of consumers use a Smart TV, while Amazon Fire sticks, Roku, and gaming devices such as a PlayStation and Xbox are slowly emerging as go-to devices to stream video content as well. If brands want to maximize their marketing efforts, the ability to adapt to emerging trends and platforms will be key to reaching a target audience and exposing them to relevant ads.

Consumers are still watching linear TV. 43% of US Adults 18+ watch live TV every day, while 26% of consumers watch live TV at least a few times a week. 40% of consumers still use a traditional cable service for live TV, while 43% are using either a paid subscription or free streaming service to watch live TV. In terms of paid subscriptions, consumers are using Hulu + Live TV, YouTube TV, Apple TV+, CBS/Paramount+, and Peacock premium to watch live TV. Some of the free subscriptions that consumers are using to watch live TV are Pluto TV, Peacock, and Tubi.

Younger people tend to subscribe to multiple streaming video services such as Netflix, Amazon Prime, Hulu, or an equivalent streaming service. They are typically using CTV devices to stream content, such as smart TVs, gaming consoles, tablets, phones, and streaming sticks. These consumers are also likely to tune in to their favorite podcast episodes via Spotify, Apple Podcasts, or Audible. Although consumers' media consumption is trending toward digital-only, mainly by Gen Z and Millennials, consumers from older generations tend to consume content via traditional formats such as live TV via cable, newspapers and radio. Brands will want to consider a stable mix of traditional and digital media tactics to effectively reach their target. Social media platforms and websites have high usage across older and younger consumers alike across Facebook, Instagram, YouTube, Twitter and TikTok.

What's Next?

Get unduplicated, person-level insights, just like the data in this report, through a combination of data from Big Village's Audience Intelligence dashboard. Compare audiences' media consumption behavior across CTV/linear TV, digital, social, websites, podcasts, radio, newspapers and magazines. Or measure distributed platforms along with networks, channels, social sites, websites, and apps based on user interests and purchase history. Profiling your audience to activate has never been easier.

Brands should be **considering ads on all devices** to reach their consumers and build brand awareness.

Brands will want to **consider a stable mix of traditional and digital media tactics** to effectively reach their target.





Interested in looking into a customer audience and understanding their media behavior?

Contact Big Village now to make your media buy more effective with on-demand, actionable insights.

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