

# US TV Usage and Ad Spend Snapshot

April 2022

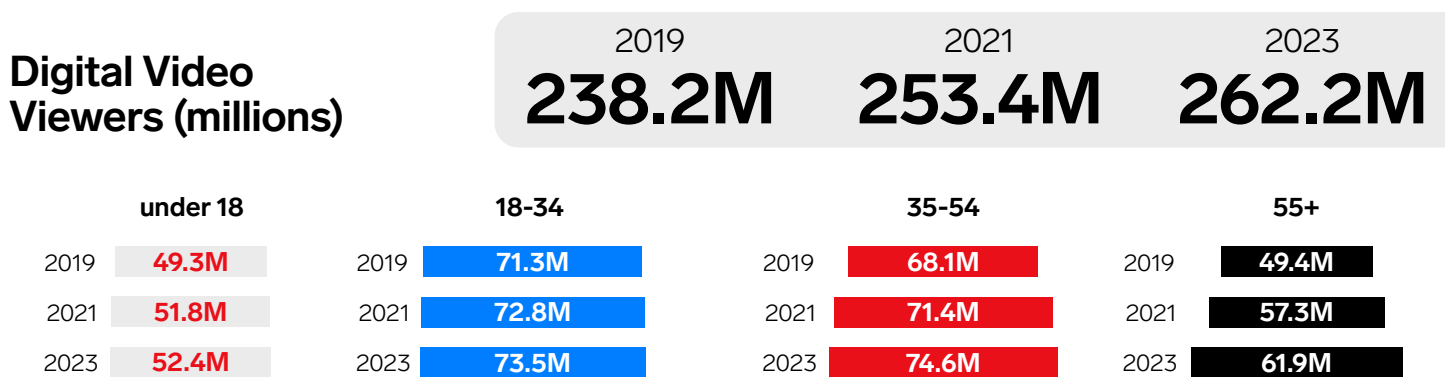
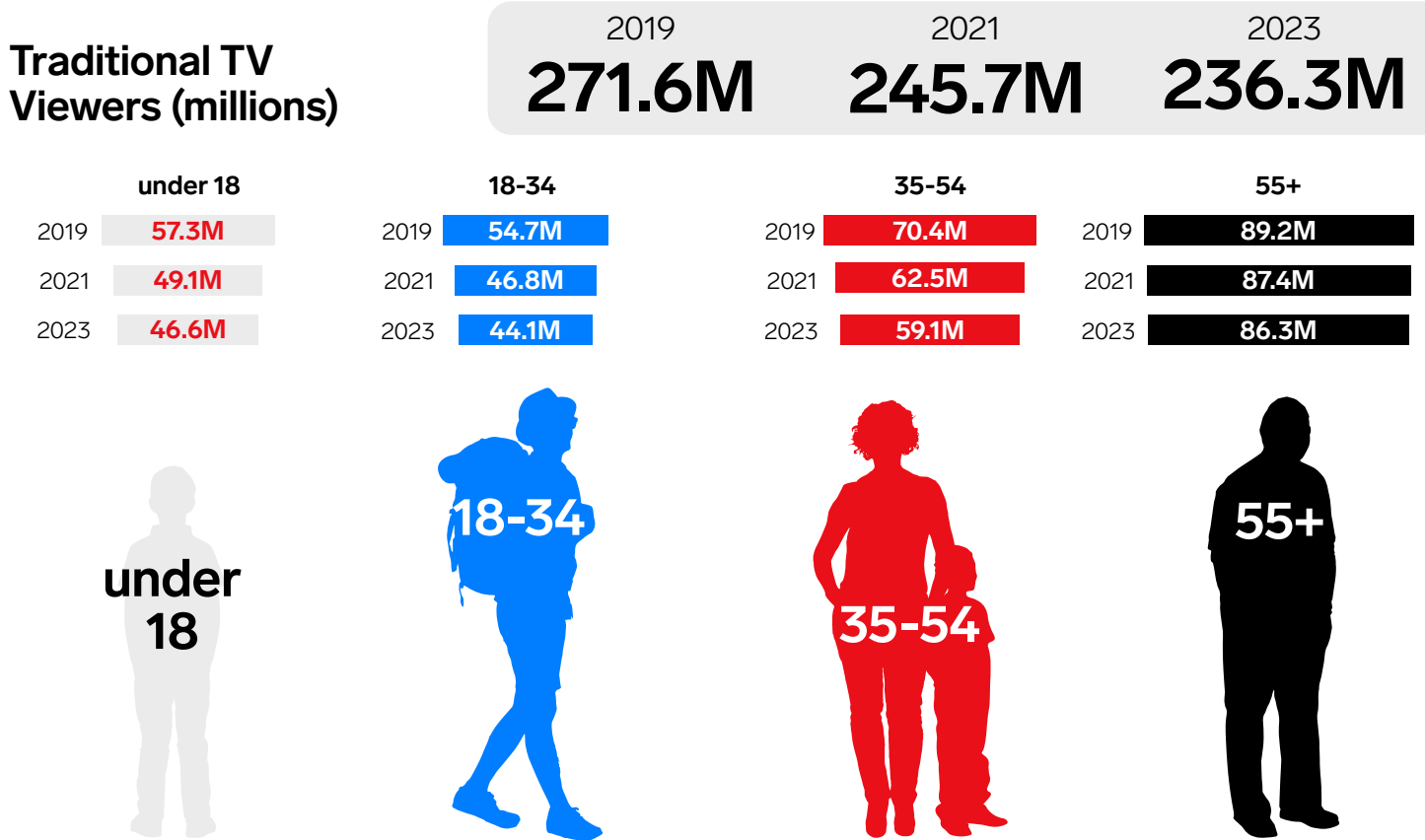
TV screen advertising spend will grow by over \$14 billion in the next four years, despite the stagnation of the traditional TV market. US viewing patterns are shifting toward digital as more Americans cut the cord and move to connected TVs (CTVs) and streaming services. eMarketer has created this infographic Snapshot to help marketers and advertisers understand the US TV market, including breakdowns of viewership, time spent, and ad spend across traditional TV, CTV, and over-the-top (OTT) video.

Made possible by



# Traditional TV and Digital Video Viewership

Traditional TV viewership rates continue to wane, largely because Americans continue to cut the cord and are seeking out more affordable, personalizable, and on-demand ways to access the content they want, when they want it.



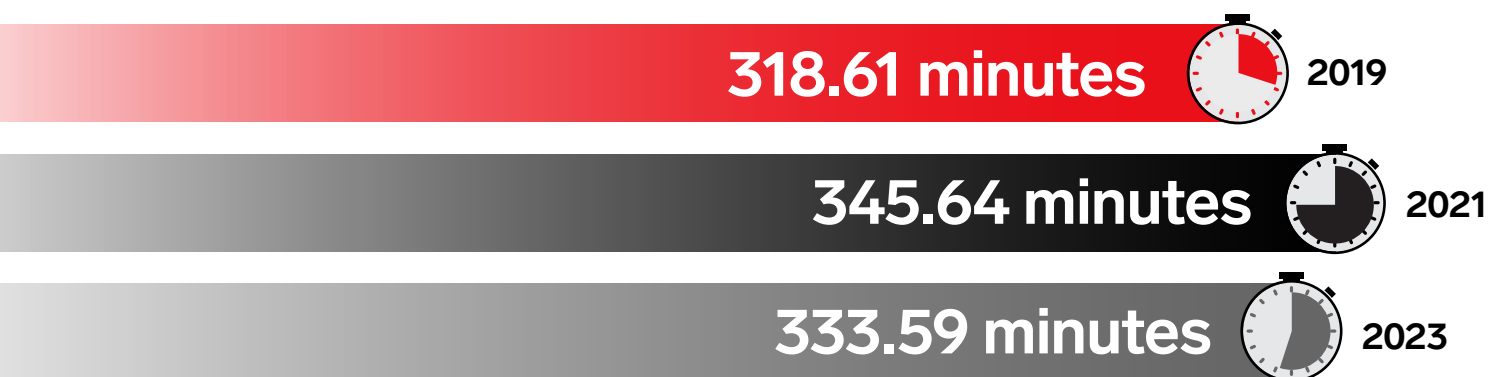
Traditional TV Viewers (Overall and by Age)  
Source: eMarketer, January 2022 (see note, page 10)

Digital Video Viewers (Overall and by Age)  
Source: eMarketer February 2022 (see note, page 10)

# Time Spent with Traditional TV and Digital Video, including Streaming

Among US adults, daily average time spent with TV and digital video (including streaming) will reach about 5.5 hours in 2023, down about 10 minutes from 2021, which got a boost from the pandemic. Viewing trends—including the number of people watching digital video on CTVs and the time they spend doing so—are shifting irrevocably toward digital.

## Average Time Spent per Day with Traditional TV and Digital Video (mins)



## Average Time Spent per Day with Media (mins)

	Digital	Print	Radio	Traditional TV	Total
2019	409.25 mins	18.84 mins	95.25 mins	207.45 mins	742.57 mins
2021	480.57 mins	18.51 mins	86.22 mins	196.60 mins	793.23 mins
2023	499.82 mins	17.44 mins	85.33 mins	171.06 mins	784.88 mins

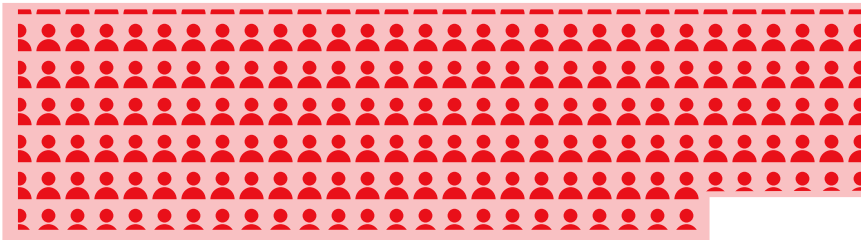
Source: eMarketer, January 2022 (see note, page 10)

# Pay TV Viewership and Ad Spending

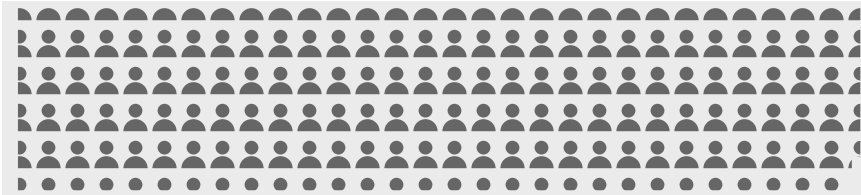
More and more US households are dropping traditional pay TV services. The number of viewers will shrink from 149.8 million in 2021 to 135.2 million next year. This is largely due to the increasing prices of these services, which are also offering the same or less value of programming. For instance, more Americans than ever before are accessing key live events on streaming services. Meanwhile, advertising will stay flat as spending increases slightly in 2022, and will still account for \$66.31 billion next year.

## Pay TV Viewers (millions)

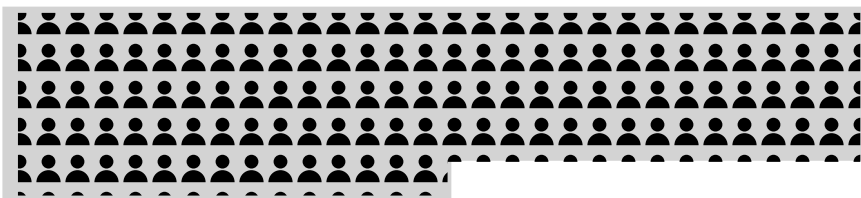
2019 **174.1M**



2021 **149.8M**

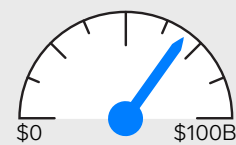


2023 **135.2M**



## Ad Spending (billions)

2019



**\$70.59**

2021



**\$65.66**

2023



**\$66.31**

Source: eMarketer, March 2022  
(see note, page 10)

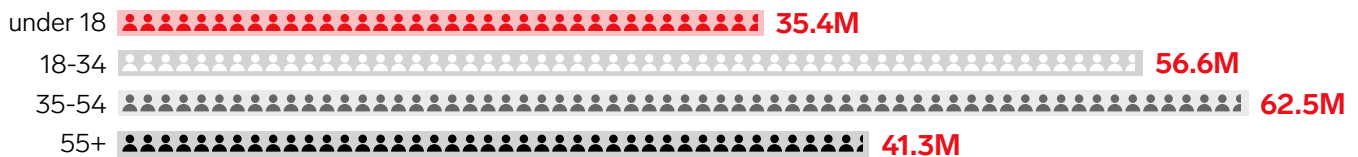
Source: eMarketer, February 2022 (see note, page 10)

# CTV Users and Ad Spending

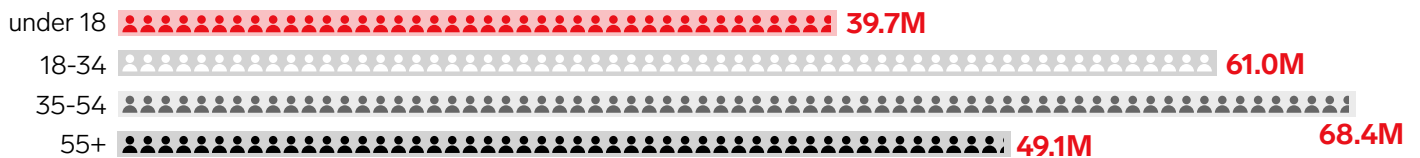
About two-thirds of the US population are CTV users, and viewership will increase to 227.6 million by 2023, from 218.3 million last year. By contrast to traditional TV, CTV advertising is gaining steadily and is expected to reach \$23.90 billion next year. All the growth in TV screen advertising will come from the digital side. This shift means that a growing amount of the TV inventory is digital in nature, offering more refined targeting capabilities as well as the ability to drive and track more specific outcomes than is possible through traditional channels.

## CTV Users by Age (millions)

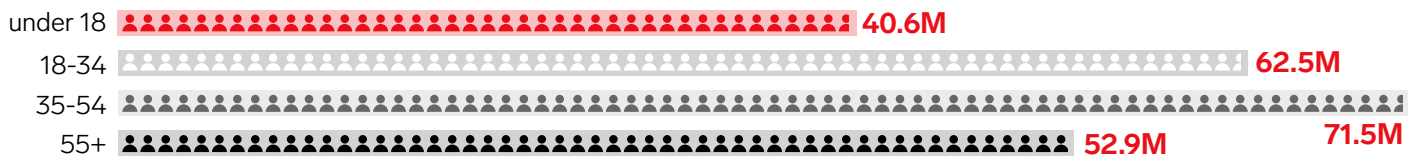
2019 **195.9M total**



2021 **218.3M total**

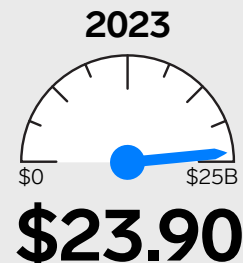
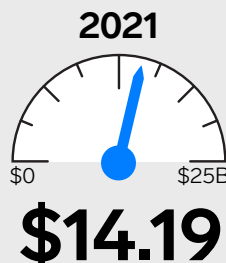
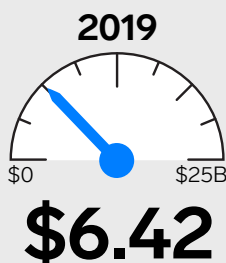


2023 **227.6M total**

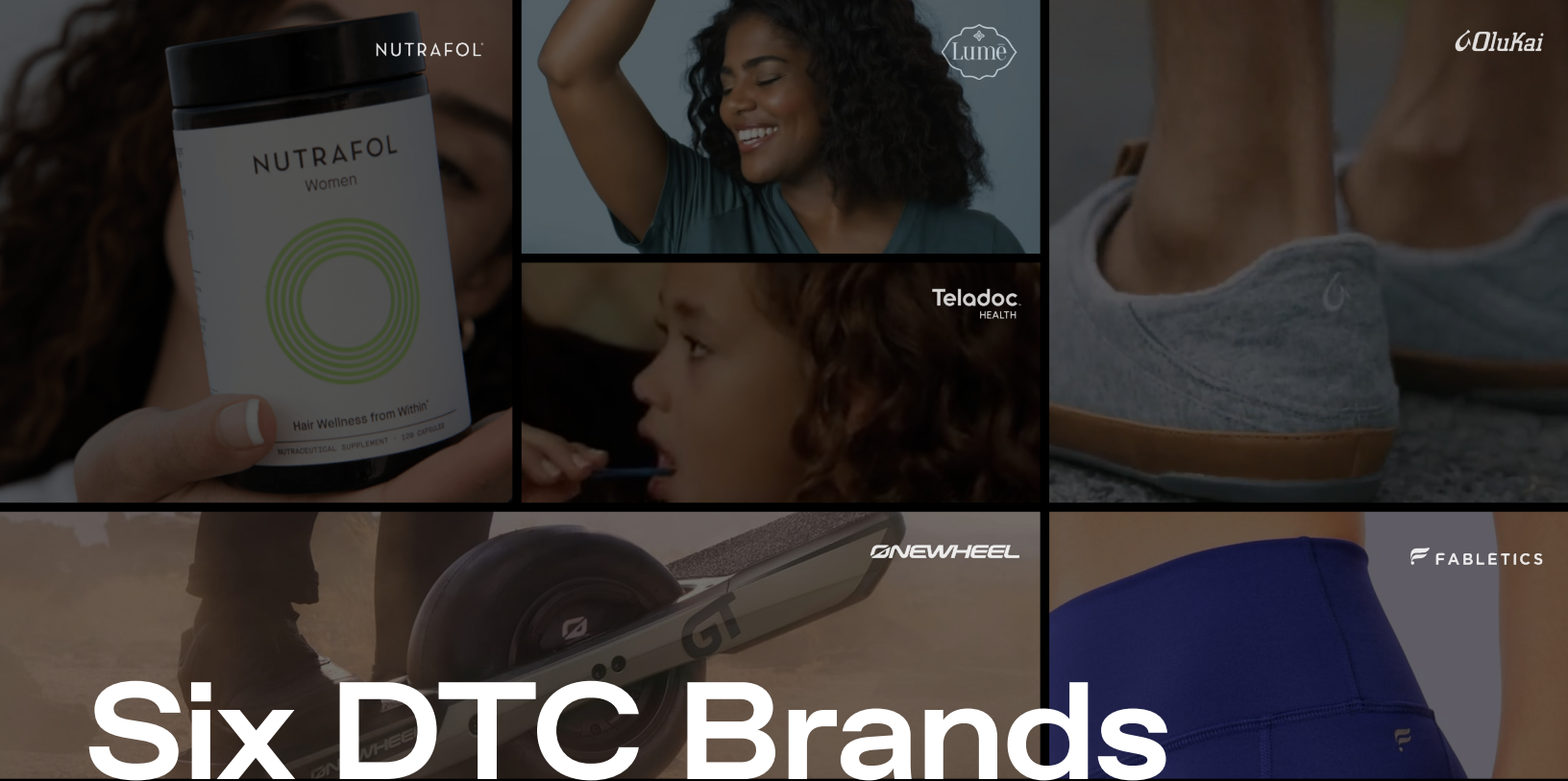


Source: eMarketer, February 2022 (see note, page 10)

## Ad Spending (billions)



Source: eMarketer, March 2022 (see note, page 10)



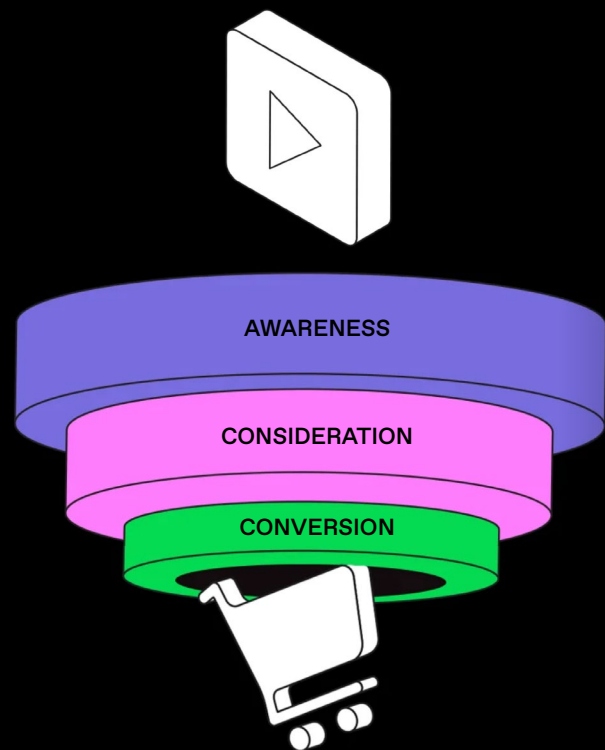
# Six DTC Brands Find Full-Funnel Success on TV

TV is a multi-faceted advertising channel that can be as effective at driving conversions and measurable sales as it is at generating mass reach and awareness.

Tatari's advanced measurement and media buying capabilities equip brands with the tools necessary to truly optimize their TV campaigns.

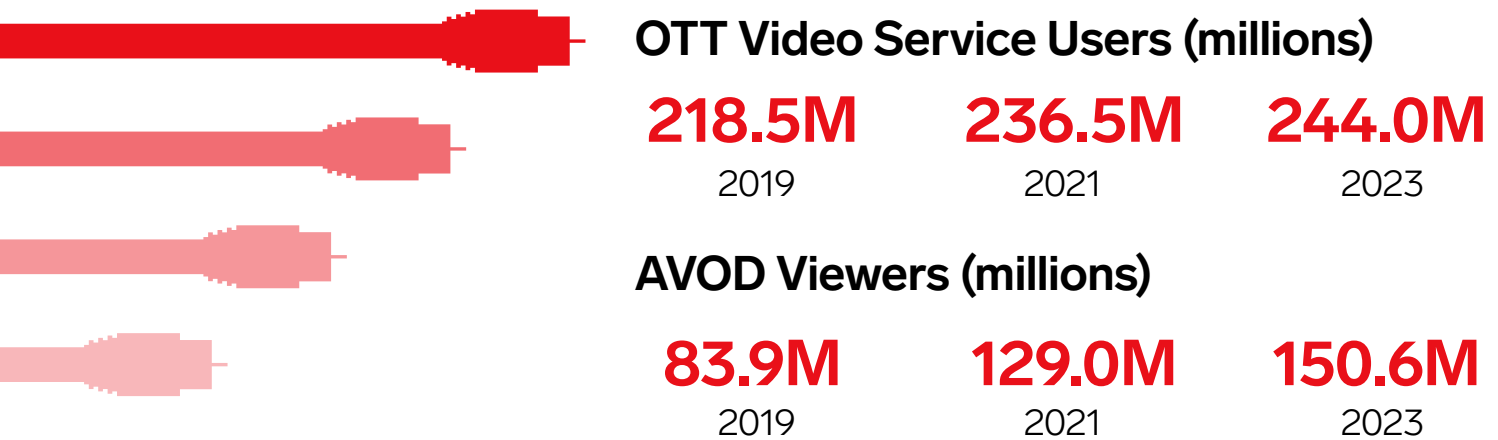
See how six performance-driven clients are finding full-funnel success with linear & streaming TV in this exclusive, interactive experience.

[See Their Stories and Creative on Adweek >](#)



# OTT Video and AVOD Viewership

OTT usage is growing as an increasing number of tech companies and media conglomerates invest heavily in streaming video. The most sought-after content is moving to OTT—think “The Handmaid’s Tale” (Hulu), “The Mandalorian” (Disney+), and more. Both flexibility and programming are driving the conversation and positioning OTT at the center of the cultural zeitgeist that pay TV long held.



## AVOD Viewers by Platform

Beyond Hulu and Peacock, these ad-supported-only service players are also seeing viewership increases primarily across CTV. Consumers are discovering content through on-screen search and via advertising for free-to-view services like Pluto TV and others.

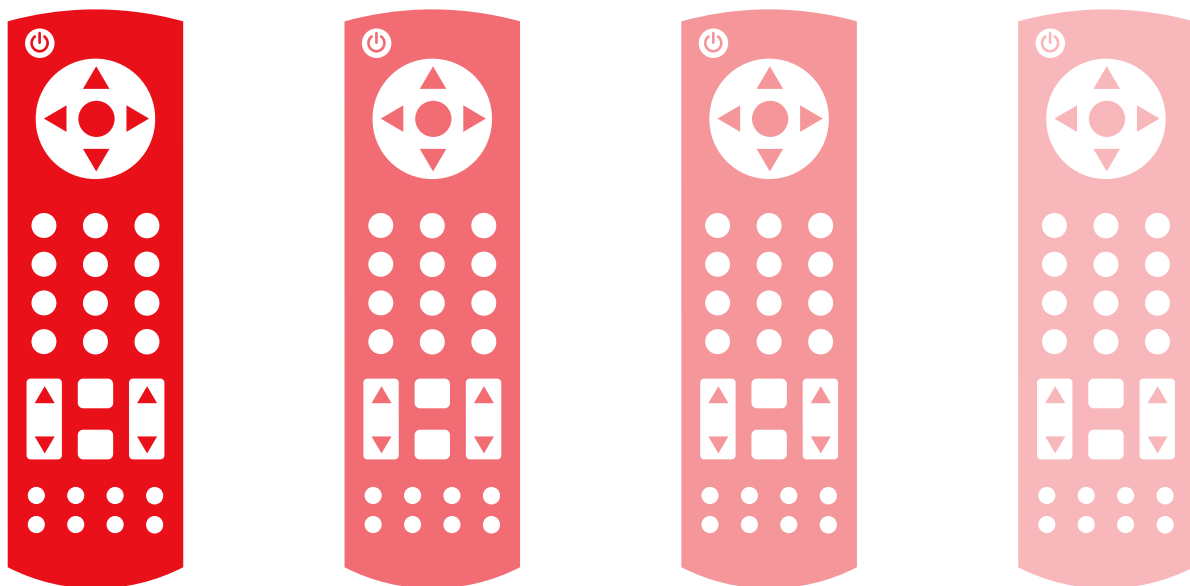
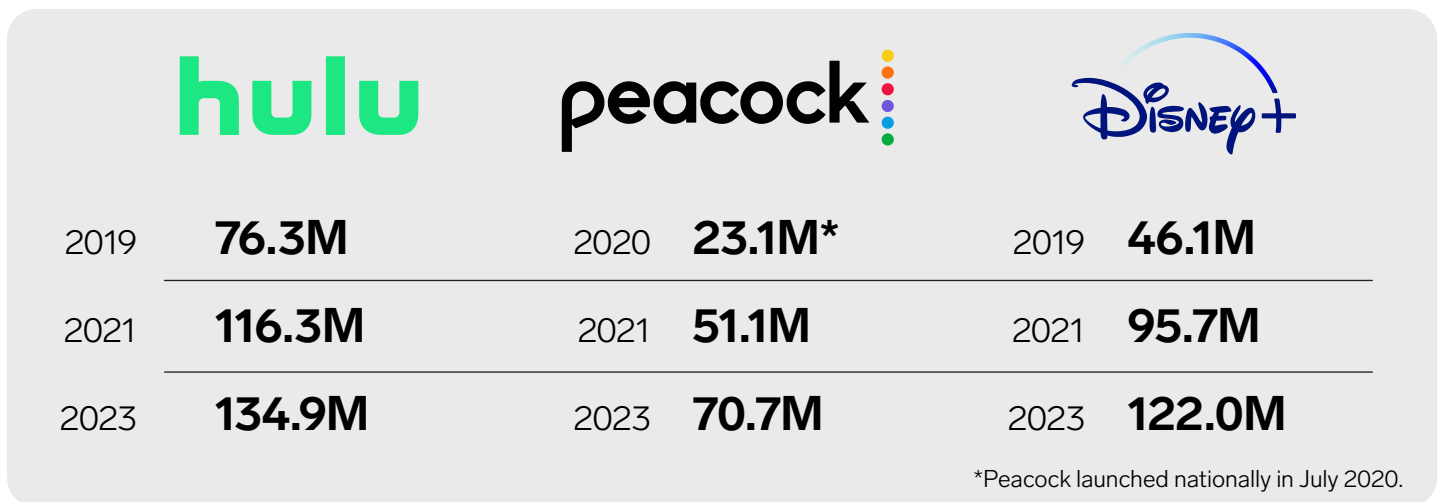
	YouTube	pluto TV	The  Roku Channel
2019	<b>69.9M</b>	<b>24.1M</b>	<b>25.7M</b>
2021	<b>125.1M</b>	<b>55.1M</b>	<b>50.0M</b>
2023	<b>138.7M</b>	<b>61.5M</b>	<b>56.8M</b>

Source: eMarketer, February 2022 (see note, page 10)

# OTT Viewers by Platform with Ad-Supported and Ad-Free Models

Ad-supported video is the new streaming gold rush. Viewership is growing for platforms like Hulu and Peacock, which both tout ad-supported and ad-free models. Hulu's success has been aided by its early entrance into the streaming marketplace, and advantages afforded by Comcast and Disney.

In March 2022, Disney+ announced that it will roll out an ad-supported membership option alongside its non-ad subscription option. The option will launch in late 2022 in the US and expand globally next year. The tier's price hasn't been revealed yet, but it's expected to be less than Disney's current ad-free tier, which costs \$7.99 a month.



Source: eMarketer, February 2022 (see note, page 10)



# eMarketer's Forecast Methodology

Our forecast for viewership and users is based on the analysis of survey and traffic data from research firms, regulatory agencies, sales projections, company-specific data, reported subscriber numbers from major pay TV providers, historical trends, and demographic and socioeconomic factors.

In addition, our ad spending forecasts are based on the analysis of various elements related to the ad

spending market, including macro-level economic conditions; historical trends of the advertising market; historical trends of each medium in relation to other media; reported revenues from major ad publishers; estimates from other research firms; data from benchmark sources; consumer media consumption trends; consumer device usage trends; and eMarketer interviews with executives at ad agencies, brands, media publishers, and other industry leaders.

## Glossary

**Advertising-Based Video-on-Demand (AVOD)** services include free platforms like YouTube as well as those, like Hulu, that charge a subscription fee in addition to serving ads. *Page 7*

**Connected TV (CTV)** is a TV set connected to the internet through built-in capabilities or through another device such as a Blu-ray player, game console, or set-top box (e.g., Apple TV, Google Chromecast, Roku). *Page 5*

**Digital Video** is video content that is viewed, streamed or downloaded via the internet. Includes professional and amateur video of any length, eg short clips, TV shows or full-length movies. *Pages 2, 3*

**Over-the-Top (OTT) video** is any app or website that provides streaming video content over the internet and bypasses traditional distribution;

examples include HBO Max, Hulu, Netflix, and YouTube. Traditional distribution includes internet protocol TV (IPTV), cable, satellite, wireless carriers and fiber operators, multiple system operators (MSOs), multichannel video programming distributors (MVPDs), and major TV broadcast and cable networks. *Page 7*

**Pay TV** is a service that requires a subscription to a traditional pay TV provider and; excludes IPTV and pure-play digital video services (e.g., Hulu, Netflix, YouTube, Sling TV, etc.). Traditional pay TV providers include cable, satellite, telco and fiber operators, MSOs, MVPDs, and major TV broadcast and cable networks. *Page 4*

**Traditional TV** is traditional media, including devices, broadcast/cable networks, programming, and viewership. *Pages 2, 3*

# Notes

## Page 2

Traditional TV Viewers: individuals of any age who watch live or recorded video on a TV set at least once per month; includes DVR and other prerecorded video (such as video downloaded from the internet but saved locally); excludes digital

Digital Video Viewers: internet users of any age who watch digital video content via any device at least once per month

## Page 3

Time Spent with Traditional TV and Digital Video: ages 18+; includes time spent watching TV and viewing digital video; time spent with each medium includes all time spent with that medium, regardless of multitasking

Time Spent with Media: ages 18+; time spent with each medium includes all time spent with that medium, regardless of multitasking; for example, one hour of multitasking on desktop/laptop while watching TV is counted as one hour for TV and one hour for desktop/laptop - Digital: includes all internet activities on desktop and laptop computers, and includes CTV devices such as Apple TV, Boxee, connected Blu-ray devices, connected game consoles, Google Chromecast, Roku, smart TVs, and other internet-connected devices - Print, Radio, TV: excludes digital

## Page 4

Pay TV Viewers: ages 18+; pay TV viewers are individuals who have access to traditional pay TV services; includes cable, satellite, telco/fiber operators, and MSOs; excludes IPTV and pure-play online video services (e.g., Hulu, Netflix, YouTube, Sling TV, etc.)

Pay TV Ad Spend: advertising that appears on broadcast TV (network, syndication, and spot) and cable TV; excludes digital

## Page 5

CTV Users: individuals of any age who use the internet through a CTV at least once per month

CTV Ad Spend: digital advertising that appears on CTV devices; includes display ads that appear on home screens and in-stream video ads that appear on CTVs from platforms like Hulu, Roku, and YouTube; excludes network-sold inventory from traditional TV and addressable TV advertising

## Page 7

OTT Service Users: individuals of any age who watch video via any app or website at least once per month that provides streaming video content over the internet and bypasses traditional distribution; examples include HBO Max, Hulu, Netflix, and YouTube

AVOD Viewers: individuals of any age who watch videos

(via app or website) on an ad-supported platform that primarily has professionally produced content at least once per month; examples include Hulu, Peacock, Pluto TV, Tubi, and The Roku Channel; excludes services like YouTube and Twitch; AVOD video services are not mutually exclusive; there is overlap between groups

YouTube Viewers: individuals who watch via a CTV device at least once per month

The Roku Channel, Pluto TV Viewers: individuals of any age who watch video via an app or website at least once per month

## Page 8

Hulu, Peacock, Disney+ Viewers: individuals of any age who watch video via app or website at least once per month, regardless of subscription tier

# Power your next move with clear and credible insights.



## Stay informed with daily newsletters

Keep up with timely digital trends delivered straight to your inbox.

[Learn More](#)



## Get the bigger picture

Our research is trusted by industry leaders. Over 100,000 business decision-makers, including many of the Fortune 1000, and most major media companies and agencies, subscribe to Insider Intelligence research.

Learn if your company [subscribes](#).



## Learn more about TV advertising trends

For more coverage, visit our [website](#).

## We are here to help.

If you are an eMarketer research client and have questions, please contact [ii-help@insiderintelligence.com](mailto:ii-help@insiderintelligence.com).

If you are not a research subscriber, please send inquiries to [ii-sales@insiderintelligence.com](mailto:ii-sales@insiderintelligence.com).

To learn about advertising and sponsorships opportunities, contact [advertising@insiderintelligence.com](mailto:advertising@insiderintelligence.com).