


The Daily: The most interesting ways we are changing how we spend time with media—a TV surprise, TikTok content, and more

Audio



On today's podcast episode, we discuss our changing digital media consumption habits: how much time we spend per day with media, how TV watching is holding up, how much we digitally multitask, and more. Tune in to the discussion with our forecasting writer Ethan Cramer-Flood and director of forecasting Oscar Orozco.

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Episode Transcript:

Marcus Johnson:

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Ethan Cramer-Flood:

Spotify is similar to TikTok in that it's one of those platforms that ranks in the middle of the pack among the whole population, but its users love it. You've got like 16 minutes a day among the whole population, but among users up to 51, and that's a TikTok style data point.

Marcus Johnson:

Hey gang, it's Thursday, April 4th. Ethan, Oscar and listeners, welcome to the Behind the Numbers Daily, an EMARKETER podcast made possible by Walmart Connect. I'm Marcus and I'm joined by two people, let's meet them. We start with our principal forecasting writer based in New York City, it's Ethan Cramer-Flood.

Ethan Cramer-Flood:

Marcus, I am spending time with you as we talk about time spent.

Marcus Johnson:

We're cutting that out. We're good. We're also joined by Oscar Orozco, who is one of our senior directors of forecasting, also based in the New York City.

Oscar Orozco:

Hello Marcus. Hello listeners. I don't know how I can follow up on that one, but I'm excited to talk.

Marcus Johnson:

It's a low bar mate.

Oscar Orozco:

Followed by.

Marcus Johnson:

Just say hi. Fact of the day. Do we have for you the most expensive book ever bought? The most expensive book ever was Codex Leicester by Leonardo da Vinci. The book essentially is Leonardo da Vinci's science diary created in 1510. It contains his drawings, theories, and observations on things like the movement of water, the luminosity of the moon, and why fossils of sea creatures can be found on mountains, so there's a lot in there. The book sold for a record, \$31 million in 1994 when Bill Gates bought it. That'd be 55 million in today's money.

Oscar Orozco:

Do we know if he still owns it?

Marcus Johnson:

Good question. He better.

Ethan Cramer-Flood:

Da Vinci wrote a lot of bangers.

Oscar Orozco:

He did, but that one apparently some weird themes there. He had too much time on his hands. I think how water flows, really?

Marcus Johnson:

It's too much time on his hands. It's too much for a book though. I was looking at a book the other day for like 30 bucks and I was like, not on my watch. No. Anyway, today's real topic, how time spent with media is changing.

Marcus Johnson:

In today's episode. First in the lead we'll cover time spent with media knowing other news today. For today's episodes, it's going to be a Shark Tank style episode. We've just updated our time spent with media numbers, and so I asked Oscar who worked on the numbers and Ethan, who is writing about them to pick their top three most interesting time spent stats. They will now take it in turns to try and convince me and you, the audience that they are the most interesting stats and more interesting than their opponents ones. I will award a score out of 10 after each go, three rounds because they've got three each. Most points wins. Let's play.

So Ethan, you're up first. We've got 45 seconds on the clock for your pitch. Most interesting stats, number one?

Ethan Cramer-Flood:

I'm going to start with TV. This year we actually had an upward revision to our time spent with television estimates, can't remember the last time that ever happened. It turns out that many cohorts in the US among adults are retreating from television somewhat slower, at least slower than we thought they would, slower than they have been in the past, so time spent with TV this year will still be roughly three hours among adults, which only represents a seven-minute decline off of last year. Time is spent with TV by active television viewers is still over four hours this year, only losing a few minutes off of last year's figures. Those figures are still declines. No crazy news here, but the declines are relatively low compared to what we're used to and that stood out and so we did feature it in the report.

Marcus Johnson:

What's your stats?

Ethan Cramer-Flood:

My stat is that adults will spend two hours and 55 minutes with television this year, which is higher than we thought it was going to be.

Oscar Orozco:

I love it.

Marcus Johnson:

Yeah, that is pretty high. I was just looking at the numbers by generation, which is just, I mean in terms of talk about discrepancy between the two. Boomers just under five hours, Gen Z about an hour. But you're right, I mean just looking at time going down, it's like a couple of minutes per year, but not nearly as precipitous a drop as you would've expected, so that's a good one. I mean it's like-

Ethan Cramer-Flood:

It's absolutely a generational story.

Marcus Johnson:

Yeah.

Ethan Cramer-Flood:

In the new information that came to light that caused us to reassess was specifically because older cohorts and middle-aged cohorts are the ones that are not leaving TV nearly as fast as they used to, whereas the younger cohorts are probably never there to begin with. But if a huge chunk of the population is over age 45 or even over age 35, and they are only bailing on TV slowly. Now we should also mention that part of the reason is because so many people have already cut the cord, so many people are already at zero, but the people that are still sticking around are sticking around.

Oscar Orozco:

Any Ethan you mentioned in the report. You also mentioned the year-over-year declines were minutes. We're talking about minutes here, I think, if I remember correctly, 10, 15 years ago. 15, 20 minutes per year. So that's really slowed down now.

Ethan Cramer-Flood:

Right at this rate, it's going to take a long time for traditional TV to actually die out the way it's been predicted to for the last 10 or 15 years.

Marcus Johnson:

All right, I'm changing the format. Mid-episodes we're scrapping Shark Tank style and we're going dunk contest. Yes, so three dunks.

Oscar Orozco:

And be a jam.

Marcus Johnson:

Ethan's first dunk. I've given it a four.

Oscar Orozco:

I like it.

Marcus Johnson:

Four out of 10. It's okay. It's like a dunk that you've seen in previous years. There's nothing one that maybe you could do in a game perhaps, but yeah, four out of 10, because that is kind surprising. And yeah, the generational story is-

Oscar Orozco:

We have one judge?

Marcus Johnson:

Yeah, that's all you need.

Oscar Orozco:

Can we get three in here?

Marcus Johnson:

Okay, thank you.

Oscar Orozco:

Okay. All right.

Marcus Johnson:

But no, it's a good start. It is an interesting story and yeah, you would've thought that no one watched cable TV. Not true, 40% of households still have it. You would've thought no one watched TV anymore. Not true. Just under three hours, is what you're saying, Ethan?

Ethan Cramer-Flood:

Three hours for the whole population, four hours among people that still watch.

Marcus Johnson:

Right. Okay. Okay. Very nice. Oscar, your first dunk.

Oscar Orozco:

Very interesting one. Well, my first one will be sort of in line with what Ethan was talking about here because it does pull in a little bit of the TV time spent numbers, but also TikTok. When we look across linear TV time only for the 18 to 24 year olds or what we call adult Gen Z-ers, Gen

Z-ers. So looking at linear time that they spend versus the time they spend on TikTok. Now a caveat, we're talking about the whole cohort's population, so it would include those who use TikTok or watch TV and those who might not, but it allows us to compare more closely. So when we look at those, as of last year, time on TikTok is four minutes higher than the time they spend watching linear TV. So that's 57 minutes on TikTok, 53 minutes on TV. So in 2022 TV time was still higher, but as of last year, it is now TikTok in the lead and the gap jumps to 10 minutes this year. 59 minutes on TikTok to 49 on TV.

Marcus Johnson:

Really quickly. Ethan, your stat was traditional TV, not things watched on a television. We should clarify for the listeners, so that was traditional TV.

Ethan Cramer-Flood:

Right.

Marcus Johnson:

Oscar, you are talking about adult Gen Z folks. Time spent on TikTok versus traditional TV.

Oscar Orozco:

The traditional TV, exactly.

Marcus Johnson:

As well. Okay, okay. Wow, so how many more minutes this year? 10 more minutes?

Oscar Orozco:

This year it's 10 more, yeah. Where last year was the first time that TikTok overtook TV and it was just three minutes, so the gap is widening.

Marcus Johnson:

Okay. That is a good one. That is a good one. There was an interesting article from Caroline Mimbs Nyce of The Atlantic, and the title was titled, You're Looking at TikTok All Wrong. The app is basically just broadcast TV now. It does seem like people are treating social media more like televisions, the share of time spent on social media where people are watching video has gone from, I think it was about a third before the pandemic to about two-thirds now. And

so it's interesting to see those two numbers, TV versus TikTok stacked up against each other because you could argue people are doing very different activities on those two platforms. I don't think they are, they're watching stuff and they're becoming much more similar.

Ethan Cramer-Flood:

And TikTok always struck me as an entertainment platform from day one, and it feels like a competitor to YouTube more than anything else.

Marcus Johnson:

Yeah.

Ethan Cramer-Flood:

If you think about what people are doing and how they're spending their time and why they're spending their time, it's YouTube more than a competitor for Instagram, which is what we would normally say.

Oscar Orozco:

And I was thinking as well that when we look at just the 18 to 24 age group, almost 79% of them, almost eight and 10 are using TikTok, so it's just ubiquitous. It's a huge platform for these Gen Z-ers. As the young ones, which we are not counting, but they age into adulthood. They're bringing that behavior with them as well. So engagement could continue to go up and up.

Marcus Johnson:

Yeah, very nice. All right. I've given it a seven.

Oscar Orozco:

Nice.

Marcus Johnson:

Seven out of 10 for Oscar, so he's up on Ethan's seven to four, Ethan's second dunk.

Ethan Cramer-Flood:

All right. I'll segue off the TikTok storyline by talking about time spent overall on TikTok, and we're going to compare it against the entire population versus comparing it against only its own users. Because this is a useful way to break down how everyone everywhere is really spending their time with media versus just how some cohorts of the population are. The US adult consumers will spend 18 minutes a day on TikTok this year. That's not a very big number, but among TikTok users, they will spend nearly an hour, so that's when you start to, and TikTok goes flying up the rankings just among its own users. It's one of the most popular things that anyone does among active users of a thing. But when you compare it against the whole country, it's way behind YouTube, it's way behind Netflix, it's way behind Hulu, it's even behind Facebook and people are sort of bailing on Facebook. So I thought there's almost nothing else. I don't think there's anything else that has a gap of that magnitude from 18 minutes a day among the whole population to we're saying 54 minutes a day just among users.

Oscar Orozco:

Yeah, it speaks to the reach, right? The user basis for the platforms you mentioned Ethan are so high, and so that's where that difference comes into play.

Ethan Cramer-Flood:

Right. And whereas in the country at large, so many people, I mean obviously almost everyone looks at YouTube. Netflix has a massive audience. Hulu has a surprisingly big audience, and Facebook still does too. So considering so many people spend at least some time per day on all of those platforms, they have more time spent than TikTok does by a pretty significant margin. But everybody wants, it's understandably, it's more interesting for some marketers to look just at what the users themselves are doing.

Marcus Johnson:

Ethan, where is it next year in terms of TikTok minutes? Are they still climbing pretty well or slowing down?

Ethan Cramer-Flood:

They're climbing but not by much, so this is another storyline in the report is that among basically all platforms including TikTok, things have settled in, it is pretty stable. User bases are relatively stable now. Usage is relatively stable. It will tick up by a minute, maybe a minute and a half. Oscar, if you can remember?

Oscar Orozco:

Yeah.

Ethan Cramer-Flood:

And that is one of the highest numbers. There's actually no platforms that are going to increase by more than two minutes, but it's not shifting much anymore. Nothing really is.

Marcus Johnson:

Time on social networks maxing out.

Ethan Cramer-Flood:

Yeah. Exactly.

Marcus Johnson:

Time spent with social networks by social network users reaching its ceiling next year, capping out at one hour, 50 minutes, one hour at five zero minutes per day.

Oscar Orozco:

Quite a ceiling.

Marcus Johnson:

Yes, I know it's a lot. It's been growing a few minutes per year since 2020. After the pandemic, it gave it a 14 minutes per day bump, so I got quite a bump from that. And then it's been kind of slowly growing, but we think next year it's kind of capped out. You know what Ethan? I'm going three. It wasn't as interesting as the first one. Yes, it's not your best performance.

Oscar?

Oscar Orozco:

I thought it was a cool one.

Marcus Johnson:

You don't even need to really do anything, but you could lay out would do.

Oscar Orozco:

Pass, pass. No.

Ethan Cramer-Flood:

Yeah, I know your marketer is doing a terrible job promoting our content here. Wait till I tell you how much time spent per day people spend listening to Marcus Johnson host podcasts?

Marcus Johnson:

Hopefully not much.

Ethan Cramer-Flood:

You don't want to know the ranking.

Oscar Orozco:

Coming in with a seven 20 slam here, breaking the rim. Let's go. My second stat will be about Facebook and specifically looking at the 65 and over, so the Boomer cohort. So we have breakouts by age for four platforms, so it's Facebook, Snap, TikTok, and Instagram. In looking at all of those this year for only the 65 and over, they're spending nearly 80% of their time across those four on Facebook, so that's eight and 10 minutes. So it speaks to the power of Facebook, especially if you're trying to reach as a marketer, seniors, what was that number in 2019, 93%, so essentially anyone who was 65 and over and was using the social platform was likely only spending time on Facebook. It's dropping, it'll hit 75% of the time next year, but it really is all about Facebook still for seniors.

Marcus Johnson:

What does that drop say to you? Is that from 93% of all their time being on Facebook to now closer to 80% you said, right?

Oscar Orozco:

Yeah, exactly. And I thought the drop would be faster, so I would say it's more significant that it's not dropping anymore. And I think some of the time is going to TikTok a little bit. But what this is showing is that TikTok really is being driven by the under 35 crowd, maybe under 45 a little bit, but with seniors it's not quite the case. And yeah, they're spending a bit more time also perhaps on Instagram, a couple of the more fringe socials, but it is just a Facebook story for them, which I thought was interesting.

Ethan Cramer-Flood:

I'd imagine some of the senior-most demographics are moving off of Facebook a little bit just in an effort to remain in contact with the younger cohorts that aren't there anymore. I mean, you see this trend a little bit where it's like just become the kind of place where they're not able to stay in touch with younger family members because the younger family members aren't there, so you got to spend a little bit of time elsewhere if you want to maintain that connectivity.

Marcus Johnson:

You're right. The reluctant shift. All right, Oscar, I've given it a four.

Oscar Orozco:

[inaudible 00:15:23] today.

Marcus Johnson:

Yeah, this is a bad dunk contest. Ethan, your third dunk. Currently four points behind Oscar, so you could still win it somehow. Your third dunk?

Ethan Cramer-Flood:

Yeah, I'm going for the people's choice. These judges are compromised.

Oscar Orozco:

They're awful. It's awful.

Ethan Cramer-Flood:

How much time per day does everyone everywhere spend with media and how does that compare to the trend we had previously seen? So we're saying that it's going to be 12 hours and 39 minutes per day that the average US adult, that the US adult is going to spend with media daily. That's an enormous number. We've had big numbers like that before, but the interesting story is that we had for a while thought that in the post pandemic environment we would see some declines to that big, big top line because they had spiked so much in 2020 and 2021, we thought perhaps there were some degree of return to 2019 level normalcy would occur and that number would tick down a little bit, and that just hasn't happened. In fact, she got more increases. So she's like, how could we spend more than 12 hours?

Ethan Cramer-Flood:

Well, we are.

Oscar Orozco:

We found time.

Ethan Cramer-Flood:

And so we're actually saying that it's going to go up. What do we got seven, six or seven more minutes at the top line this year? Because our digital activities that the amount of time we spend per day listening to whatever, watching whatever is still going to increase even as some of our time with TV and traditional media declines. And that was a surprise. And we also found that of the 12 hours and 39 minutes per day that people spend with media, 11 hours and 45 minutes is actually with Behind the Numbers with Marcus Johnson.

Marcus Johnson:

Really?

Ethan Cramer-Flood:

It's wild.

Marcus Johnson:

Wow. It seems low.

Ethan Cramer-Flood:

It's wild.

Marcus Johnson:

Yeah, it's disappointing America.

Oscar Orozco:

While they sleep. Maybe.

Ethan Cramer-Flood:

So they're listening to the same episodes over and over. It's shocking.

Marcus Johnson:

It's a very listenable show, Ethan.

Oscar Orozco:

It is.

Marcus Johnson:

A lot of people say they hit the back catalog just to binge the season again. Very good, so he's talking about with media, it's TV, print, smartphones, computer, computers, everything and it's if you are watching TV whilst you're on your smartphone, it's an hour for each device, so that's how we count it. There's still a lot of time and you would've thought it would have hit its ceiling.

Oscar Orozco:

And Marcus, it's interesting you're talking about second screening there, which I had an interesting stat on that. Second screening or multi-tasking, digital multi-tasking, we estimate about 84% of online individuals are digital users are second screeners. And that really does continue to grow. You would think we would've hit some sort of peak there, but more people are using multiple devices at once and so that's definitely helping with driving that time up.

Marcus Johnson:

Yeah, really quick Ethan. Social media isn't going up, so where is that those extra few minutes per day coming from?

Ethan Cramer-Flood:

That's a good question and that is of course subscription OTT for the most part, the streaming wars, we are spending more and more and more time whether we're paying for it or whether we're going to the free services or the ad-supported tiers now. More and more time actually in front of that big TV in our living room while we're sitting on the couch, so we're sort of come full circle. A little bit time incremental, time increases on mobile phones, but mostly it's a CTV story and via all those different ways that we're watching streaming services now.

Marcus Johnson:

Okay. Yeah, there was a really interesting stat Ethan, you've got in your report. Video-beating TV, this year American adults spending an hour more per day with digital video than TV. Three years ago TV accounted for 15 minutes more than digital video. And so those tables have turned and now video beating TV by more than an hour per day. Okay, I've given it a.... It's a very generous six. So Oscar a backjam will do it mate, for your final dunk.

Oscar Orozco:

Let's go.

Marcus Johnson:

Ethan's up by two points, so you need three to win.

Oscar Orozco:

I'm nailing it. Let's go with the last one for me.

Ethan Cramer-Flood:

We'll see.

Oscar Orozco:

Ethan talked a little bit about listening and so that is what I'm going to talk about here, which is audio, audio time. And the stat is that consumers spend over one in five minutes of their time, total time with media, one in five with audio, and that includes sort of traditional radio, linear radio, but digital audio which has become the majority time there, so one in five. Actually it's a share that has been dropping. So since in 2010, so we're talking almost 15 years ago, audio made up one in four minutes, so it's actually not as high as it was as a share, but part of the reason is just where people listen to audio. I think it's become a little bit less of in the home or in the vehicle. I think other activities are being done in these places, but it's still kind of an underappreciated media type because it takes up a lot of time, even if a lot of it does happen kind of secondary in the background. But it's a reminder to marketers that people love audio.

Ethan Cramer-Flood:

Yeah, and I would add that Spotify is similar to TikTok and that it's one of those platforms that ranks in the middle of the pack among the whole population, but its users love it, so you've

got like a 16 minutes a day among the whole population, but among users up to 51 and that's a TikTok style data point.

Marcus Johnson:

Yes. Ad spending definitely hasn't caught up with how much time spent people spend with audio, and still lags far behind, so that is a good one.

Oscar Orozco:

And there's so much hype. We always talk social media, video, even gaming, but audio and even on when we think about different devices, I mean you can listen to audio on the CTV and there's more of that. Even social is shifting to CTV as well and in other connected places like the connected cars and things like this, so it'll continue to grow I believe so.

Marcus Johnson:

What's the total amount of time per day?

Ethan Cramer-Flood:

So we're saying digital audio one hour and 24 minutes per day and radio one hour and 18 minutes per day.

Marcus Johnson:

Okay, so combined, that's a lot more time than social media.

Oscar Orozco:

Oh yeah.

Marcus Johnson:

Wow.

Ethan Cramer-Flood:

Okay.

Oscar Orozco:

Substantial.

Ethan Cramer-Flood:

That's for sure the case. Yes.

Marcus Johnson:

Yeah, very good. That gets a five. That's all he needed, ladies and gentlemen. And so Oscar 16 overall, Ethan 13. It was more of a kind of an Al Horford versus Jalen Brown situation.

Oscar Orozco:

Are you mailing me the prize or how am I getting this?

Marcus Johnson:

There's no prize.

Oscar Orozco:

No prize? Boo.

Marcus Johnson:

Ethan's full report on all of this is called US Time Spent With Media Forecast 2024. Pro+ subscribers, head to emarketer.com, also Oscar, you said there was another report on time spent coming out?

Oscar Orozco:

Yeah, another great report from Minda Smiley. She's covering teens and social media and covers the time spent. Some of the data we were talking about earlier, so different platforms and demographic splits as well, so check that out.

Marcus Johnson:

Very good. Excellent. That's all we've got time for, thank you so much my guests. Thank you to Ethan.

Ethan Cramer-Flood:

I'd love to be able to say it was a pleasure, but I don't know.

Marcus Johnson:

Okay.

Ethan Cramer-Flood:

I have questions about these judges.

Marcus Johnson:

Okay. Don't expect to see Ethan back on for a while. Thank you to Oscar.

Oscar Orozco:

Amazing. As the winner, I'm very pleased. Fun time guys. Thank you.

Marcus Johnson:

Better. Thanks to Victoria who edits the show. Stuart, who runs the team, and Sophie who does our social media. And thanks to everyone for listening in. We hope to see you tomorrow for the Behind the Numbers Weekly Listen. An EMARKETER video podcast made possible by Walmart Connect.