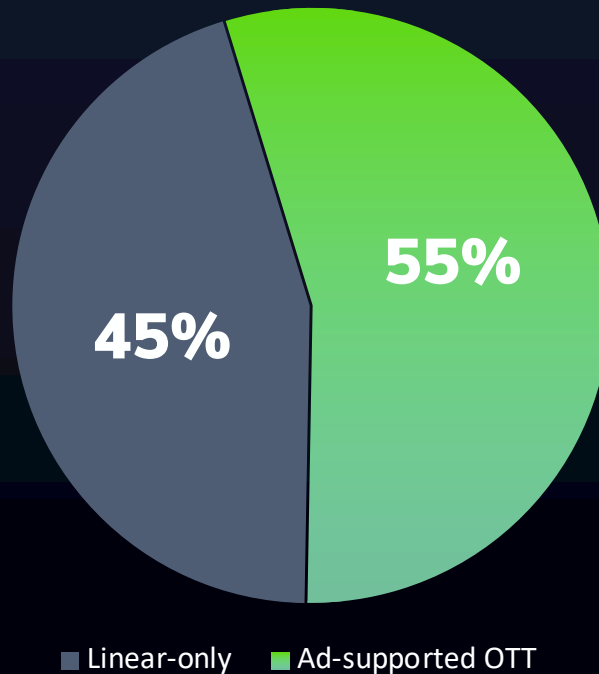# PREMION

2020 Ad-Supported OTT Voter Study

June 2020

PREMION

MORE THAN HALF OF 2020 LIKELY VOTERS
VIEW AD-SUPPORTED OTT

How Voters Are Viewing Video Programming
(ie. movies, TV shows, sports, news)

55%

45%

■ Linear-only   ■ Ad-supported OTT

Excludes ad-free OTT only households or linear households with ad-free OTT.

55%

of likely voters view ad-supported OTT with 41% of them tuning into OTT daily
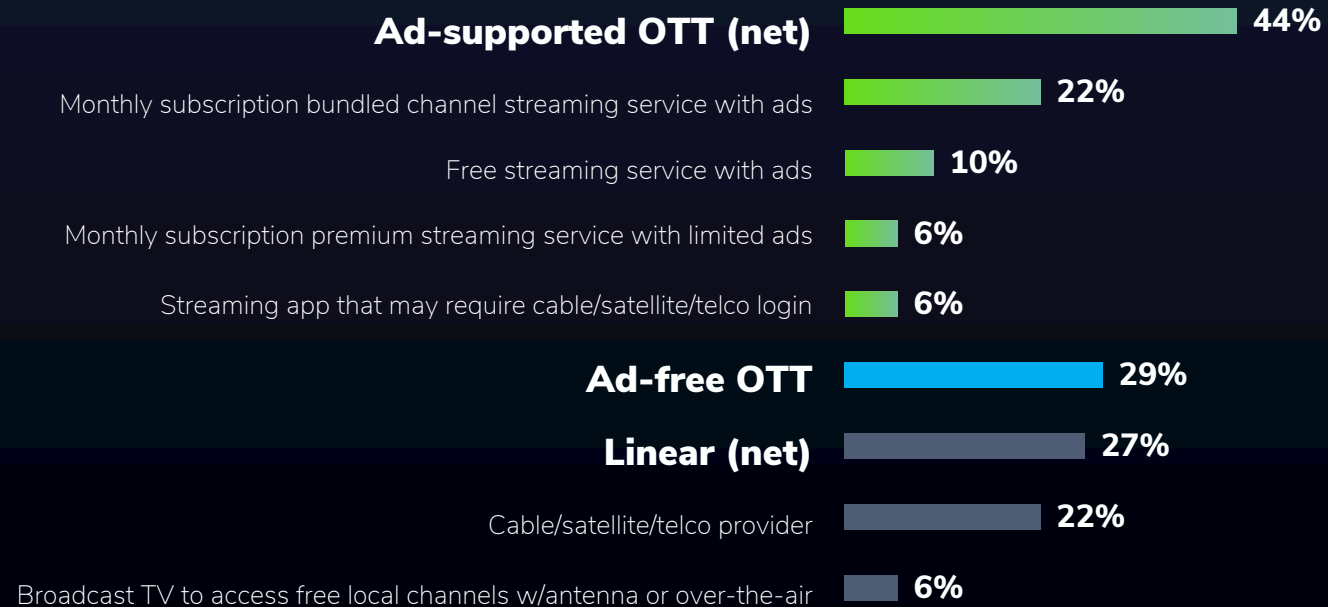
29% cannot be reached by linear TV*

Base: Total random contacts =1,375 interviews.; Ad-supported OTT = 751.
Likely voters = Very likely or Somewhat likely to voted in the upcoming 2020 Presidential election
Q3. There are a variety of ways that people watch video programming (i.e. movies, TV shows, sports, news) these days. Please indicate all of the ways you, personally watch video programming.
Q20. Now a few questions about the way people use media. How often do you use each of the following types of media?

* This is based on self-reported behavior and may exclude exposure to linear out of the home.

PREMION

AD-SUPPORTED OTT IS CITED AS
THE TOP CHOICE FOR VIDEO PROGRAMMING

How ad-supported OTT voters watch video programming

Ad-supported OTT (net)	44%
Monthly subscription bundled channel streaming service with ads	22%
Free streaming service with ads	10%
Monthly subscription premium streaming service with limited ads	6%
Streaming app that may require cable/satellite/telco login	6%
Ad-free OTT	29%
Linear (net)	27%
Cable/satellite/telco provider	22%
Broadcast TV to access free local channels w/antenna or over-the-air	6%

44%

of ad-supported OTT voters named ad-supported OTT programming as their 1st choice in viewing video programming

Base: Ad-supported OTT (excluding YouTube) = 605
Q4. Please choose the top three ways you personally, use MOST often to watch video programming these days.
excludes YouTube and "other" programming

3

PREMION

AD-SUPPORTED OTT IS POPULAR
ACROSS ALL KEY DEMOS

% of ad-supported OTT voters by **age** who chose **ad-supported OTT**
as the #1 way they most often watch video programming

18+	**44%**
25+	**43%**
35+	**39%**
55+	**35%**

Base (excludes YouTube): Ad-supported OTT 18+ years = 605; Ad-supported OTT 25+ years = 563; Ad-supported OTT 35+ years = 431; Ad-supported OTT 55+ years = 151
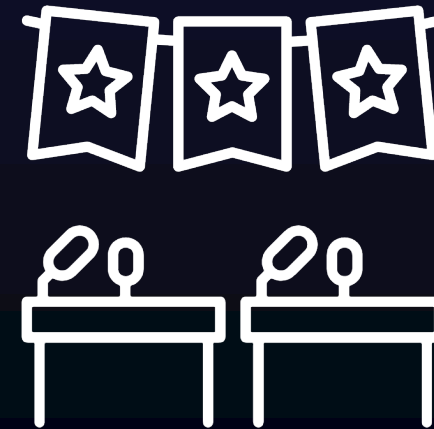**Q4. Please choose the top three ways you personally, use MOST often to watch video programming these days. [first choice].**
Excludes YouTube and "other" programming

PREMION

ALL VOTER GROUPS WATCH
AD-SUPPORTED OTT IN SIMILAR NUMBERS

% of ad-supported OTT voters by **voter group** who chose **ad-supported OTT**
as the #1 way they most often watch video programming

Democrat / Left Leaning	**45%**
Republican / Right Leaning	**44%**
Independent / Independent Leaning	**39%**

Base (excludes YouTube): Ad-supported OTT Registered Democrat/Left Leaning = 133; Ad-supported OTT Registered Republican/Right Leaning = 137; Ad-supported OTT Registered Independent/Independent Leaning = 78
Q4. Please choose the top three ways you personally, use MOST often to watch video programming these days. [first choice] .
excludes YouTube and "other" programming

PREMION

ON AVERAGE AD-SUPPORTED OTT VOTERS
STREAM 15+ HOURS A WEEK AND USE MULTIPLE STREAMING DEVICES

OTT Profile

	18+	25+	35+	55+
OTT apps & streaming services used				
2+	83%	83%	81%	76%
3+	58%	58%	56%	49%
4+	28%	29%	30%	25%
Average # services	2.8	2.9	2.9	2.8
Weekly hours spent streaming				
21+	25%	25%	24%	23%
Average hours	15.3	15.4	15.4	15.3

62%
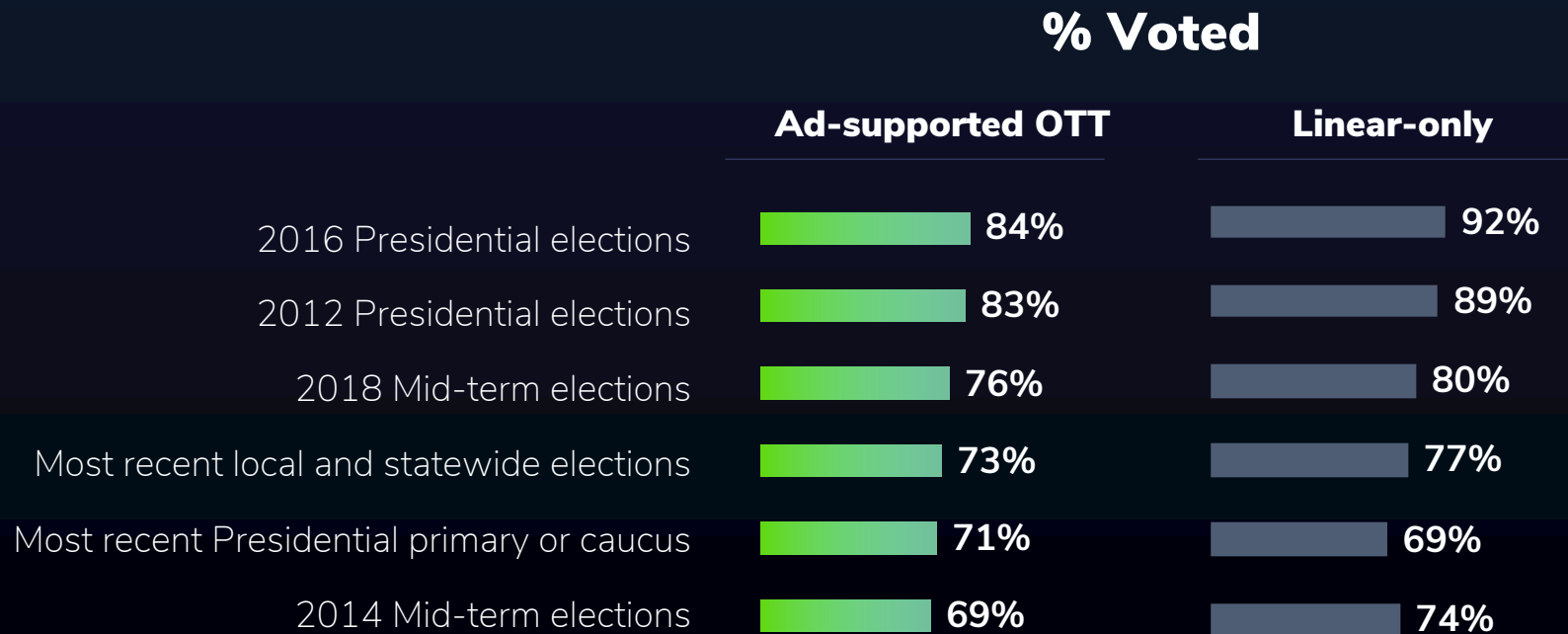**use a Smart TV for streaming**

62% 25+ years
61% 35+ years
60% 55+ years

Base: Ad-supported OTT 18+ years = 751; Ad-supported OTT 25+ years = 687; Ad-supported OTT 35+ years = 501; Ad-supported OTT 55+ years = 165
Q22. In total, how many apps and streaming services do you personally use?
Q23. Which of the following devices do you, personally, use for streaming?
Q24. About how many hours a week, do you watch streaming programming on any smart/connected TVs, computers, mobile devices, or other devices?

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IN RECENT ELECTIONS, VOTER TURNOUT WAS COMPARABLE AMONG AD-SUPPORTED OTT VOTERS & LINEAR-ONLY VOTERS

% Voted

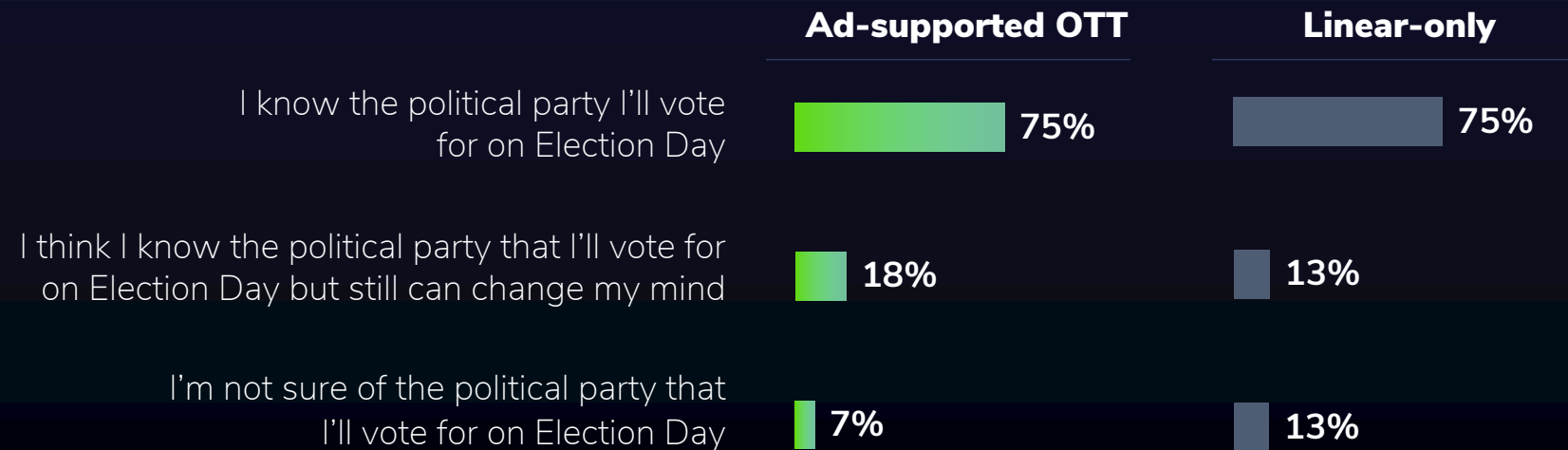|	Ad-supported OTT	Linear-only
2016 Presidential elections	84%	92%
2012 Presidential elections	83%	89%
2018 Mid-term elections	76%	80%
Most recent local and statewide elections	73%	77%
Most recent Presidential primary or caucus	71%	69%
2014 Mid-term elections	69%	74%

Bases vary: among those eligible to vote
Q10. Which of the following best describes your voting in each of the following elections?

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ONE IN FOUR AD-SUPPORTED OTT VOTERS & LINEAR-ONLY VOTERS ARE UNDECIDED

2020 Election Day Political Party Choice

	Ad-supported OTT	Linear-only
I know the political party I'll vote for on Election Day	75%	75%
I think I know the political party that I'll vote for on Election Day but still can change my mind	18%	13%
I'm not sure of the political party that I'll vote for on Election Day	7%	13%

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AD-SUPPORTED OTT VOTERS ARE
RECEPTIVE TO POLITICAL ADS

Ad-supported OTT	Linear-only
✓ **81%** Recall seeing or hearing a political ad in 2020	**70%** Recall seeing or hearing a political ad in 2020
✓ **39%** Trust ads that appear on OTT*	**30%** Trust ads that appear on Linear*

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POLITICAL ADS ARE MORE LIKELY TO
DRIVE CHANGE AMONG AD-SUPPORTED OTT VOTERS

% of voters who have **taken an action after watching political ads**

	Ad-supported OTT	Linear-only
Changed mind on candidate/political issue	18%	4%
Volunteered/Canvassed	17%	2%
Fundraised/Contributed to political candidate/committee/issue	15%	3%
Attended/Participated in rallies/forums/social groups	15%	3%
Registered to vote	11%	2%
Voted against party lines	10%	1%
Voted even though unsure of who to vote for	8%	1%

18%
of ad-supported OTT voters changed their mind on a candidate or issue AFTER viewing a political Ad

Base: Ad-supported OTT = 751; Linear-only = 752
Q14. Which actions have you taken after watching a political ad?

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PREMION is the leading OTT/CTV advertising platform, providing political advertisers access to brand-safe, directly-sourced, premium CTV content from the industry's leading TV and media brands.

PREMION enables political advertisers to reach and target desired voters at scale in states, counties, CDs, down-ballot seats, in all 210 DMAs and provides extensive reporting and validated metrics on your campaign performance.

PREMION does not source inventory from open exchanges.

For More Info Contact your Premion or TEGNA National Sales representative or:

Keith Norman
Head of Political Advertising, PREMION
knorman@premion.com
703-395-3249

APPENDIX

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METHODOLOGY

- **An online quantitative study was conducted by Ascolese Associates among a total of 1,503 consumers:**

    751 ad-supported OTT voters*:
    View ad-supported OTT programming who are:
    - 18+ years old
    - very/somewhat likely to vote in the 2020 Presidential election

    752 linear-only voters*:
    View linear programming and do not view any OTT programming (ad-free or ad-supported) who are:
    - 18+ years old
    - very/somewhat likely to vote in the 2020 Presidential election

- **Interviews occurred among a nationally representative sample of the US, resulting in 1,375 interviews.**
  A supplemental sample of linear-only voters was conducted.

- **Data collection occurred between April 28 and May 3, 2020.**

* Defined in Appendix

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DEFINITIONS

OTT voters
are defined as watching video programs through ad-supported OTT platforms:

- Free streaming service with ads
- Monthly subscription bundled channel streaming service with ads
- Streaming app that may require a cable/satellite/telco login
- Monthly subscription premium streaming service with limited ads
- **(Optional), they might watch:**
  - Monthly subscription premium streaming service without ads
  - Broadcast TV to access free local channels using a (digital) antenna or over-the-air
  - Through cable/satellite/telco provider
  - YouTube

Linear voters
are defined as watching video programs through linear platforms:

- Broadcast TV to access free local channels using a (digital) antenna or over-the-air
- Through cable/satellite/telco provider
- Do NOT watch:
  - Free streaming service with ads
  - Monthly subscription bundled channel streaming service with ads
  - Streaming app that may require a cable/satellite/telco login
  - Monthly subscription premium streaming service with limited ads
  - Monthly subscription premium streaming service without ads

Likely voters are defined as very/somewhat likely to vote in the 2020 Presidential election

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