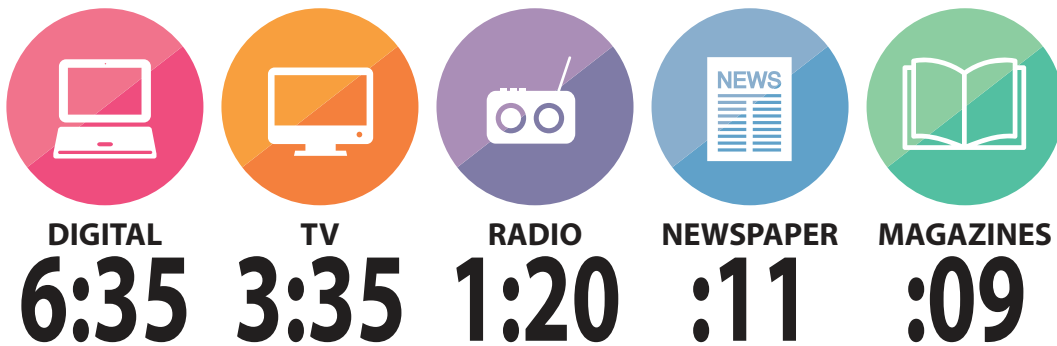


TIME SPENT WITH MEDIA



Adults (18+) in America will spend an average of 12 hours, 9 minutes per day with media this year. To put that in perspective if you live to be 75 years old, you'll spend around 38 years with media, 25 years sleeping, and only 12 years without media. The term media in this white paper encompasses mediums such as TV, radio, digital media, social media, newspapers, magazines, etc. Total time spent with media for Americans has plateaued in recent years but digital media continues to rise above traditional media. Below we will take an in-depth look at the past, present, and future of our media usage.



WINNERS & LOSERS

Digital video is a big winner. Digital audio is also gaining, TV is the big loser, as penetration declines and time spent falls, even among those who remain as viewers. TV' penetration among adults also falls below internet user penetration for the first time ever.

OVERVIEW

For US adults, time spent awake tends to be time spent using media. With a daily average of 12 hours and 9 minutes using media, just one minute higher than last year – which itself was just 1 minute higher than the previous year.

While the numbers indicate that consumers have reached a saturation point in their total media consumption, the digital portion has not stopped increasing. One component of digital's gain comes in digital audio. Smart speakers, podcasts, and apps such as Spotify all have played a role in this increase of consumption.

	2017	2018	2019	2020	2021
Digital	6:03	6:21	6:35	6:45	6:55
-Mobile (nonvoice)	3:25	3:35	3:43	3:49	3:54
-Desktop/labtop**	2:02	2:00	1:58	1:57	1:56
-Other connected devices	0:36	0:47	0:53	0:59	1:04
TV***	3:56	3:44	3:35	3:29	3:22
Radio***	1:25	1:22	1:20	1:19	1:19
Print	0:23	0:23	0:20	0:20	0:19
Other	0:20	0:20	0:19	0:19	0:19

**Includes all internet activities on desktop and laptop computers

***Excludes digital

TV VS DIGITAL VIDEO

While TV is decreasing in popularity and many people view it as a remnant of the past, when it comes to viewing TV is still king. Digital video continues to grow and be a popular option for viewing but it does not compare to TV. US adults will spend a daily average this year of 3:35 with TV, topping the figure for digital video (1:37) by nearly 2 hours per day.



GO PLAY OUTSIDE

Many parents complain that their children spend too much time watching TV and wish that they would go play outside. According to the numbers parents have gotten their wish. It's estimated that time spent with TV by kids ages 11 and younger will be 1:57 this year, more than an hour lower than in 2015, when it was 3:02. Similarly, time spent by 12-17 year olds will fall to 1:31 this year – more than 2 hours lower than the figure in 2013, when it was 3:41.

MOBILE MONSTER

A dozen years since the launch of the iPhone, smartphones still power much of the rise in time spent with digital. In the process, they've made personal computers feel almost like a form of old media. Time spent with smartphones averaged just across users was 2:51 in 2017, according to the forecast the figure is expected to reach 3:20 by 2021.

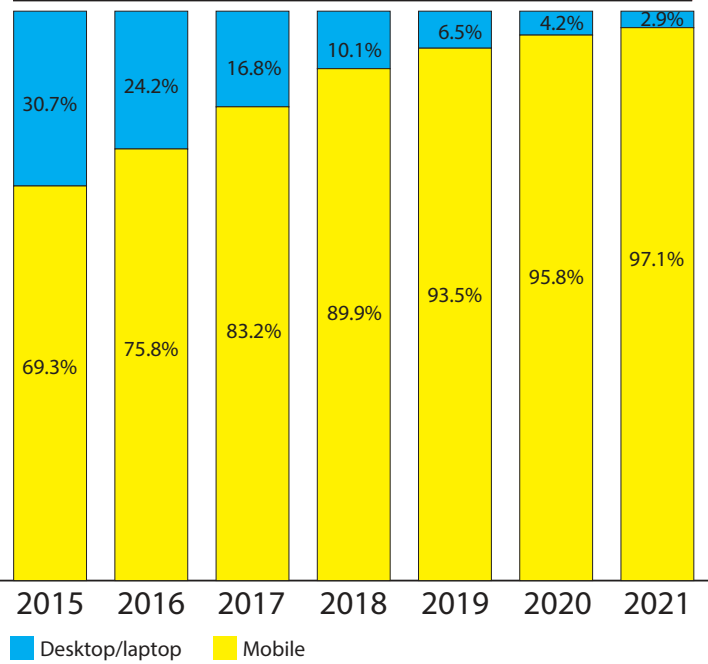
Unsurprisingly, age is a dividing line in mobile usage. It is estimated that 94.1% of millennials and 88.5% of Gen Xers will be smartphone users this year, vs 65.7% of baby boomers.

THE SCIENCE OF SOCIAL

Amid negative news about Facebook and social media in general, it's not uncommon to hear people claiming they will reduce their social usage. However, social media has achieved a "too big to fail" aura in adults' lives.

Mobile has quickly taken over as the main method of accessing social media. In 2012, desktop/laptop social time among adults averaged 20 minutes per day. This year, it will be only 3 minutes per day. Total social time spent has risen because mobile social has risen from a daily 9 minutes in 2012 to 49 minutes this year.

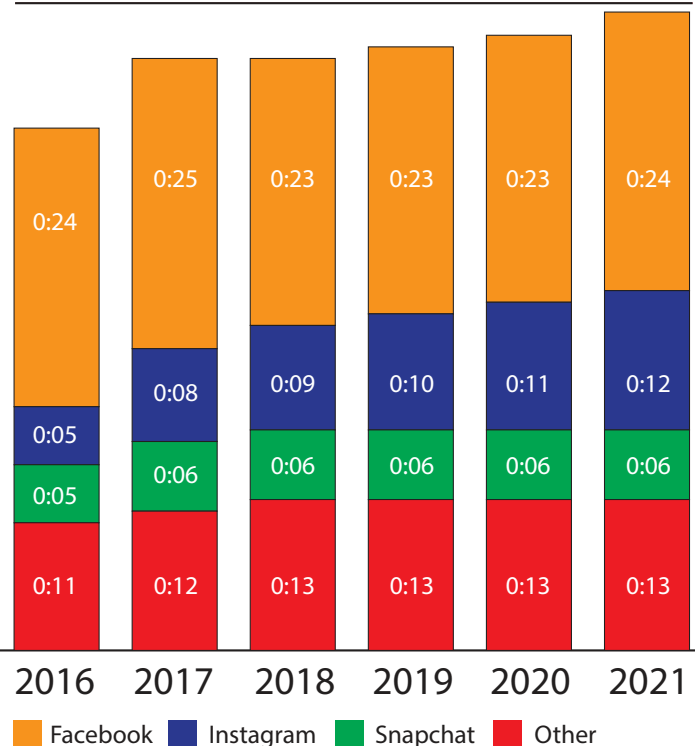
Social Networks: Share of Average Daily Time Spent in the US, by Device, 2015-2021
% of total among population



Note: ages 18+: includes all time spent with social networks, regardless of multitasking; includes usage via desktop/laptop computers and mobile (Smartphones and tablets)
Source: eMarketer, April 2019

Social Networks: Share of Average Daily Time Spent in the US, by Platform, 2016-2021

hrs: mins per day among population



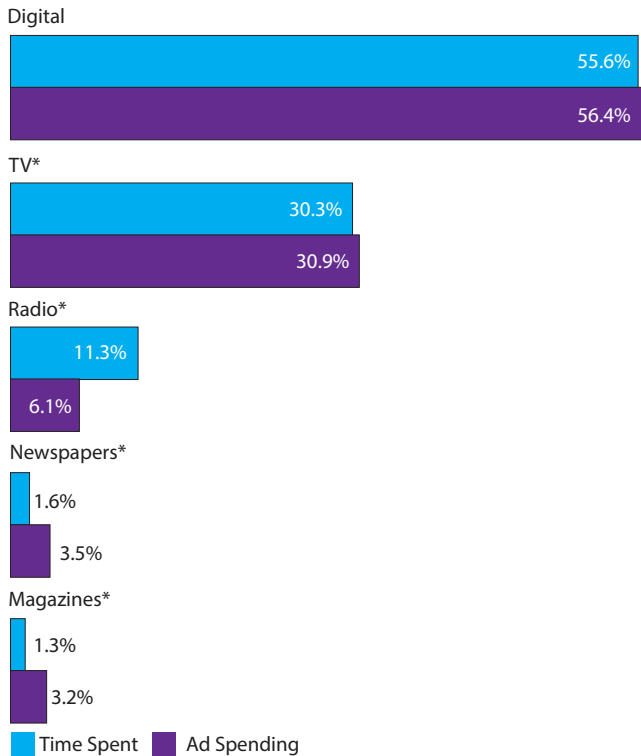
Note: ages 18+: includes all time spent with each medium includes all time spent with that medium, regardless of device or multitasking; for example, 1 hour of multitasking on Facebook while using Snapchat is counted as 1 hour for Snapchat and 1 hour for Facebook.
Source: eMarketer, April 2019

FACEBOOK FANATICS

Facebook has long been the cream of the crop when it comes to social media sites. This is absolutely still the case, but it looks like teens are moving away from the platform. Facebook penetration among teens is expected to lose more than 10% in the 12-17 age group between 2017 and 2021. Going from 48.5% to 37.0%.

Share of Time Spent with Media vs. Ad Spending Share in the US 2019

% of total



Note: ages 18+; time spent with each medium includes time spent with that medium, regardless of multitasking; ad spending share includes out-of-home; time spent share includes other; numbers may not add up to 100% due to rounding; *excludes digital.
Source: eMarketer, April 2019

THE AD SPENDING STORY

A decade ago, marketers looked like sticks in the mud, spending too much money on TV as consumers shifted their attention to digital. Those days are in the rearview mirror as time spent and ad spend now are similar metrics.

TV's share of ad spending will be lower this year than mobile's share, at 30.9% vs 37.9%. That would have been unthinkable 10 years ago, when TV's share of spending was 41.0% and mobile was 0.3%.

KEY TAKEAWAYS

- Marketers cannot count on consumer to spend more and more time using media.
- Time Spent with TV is declining, but is still far greater than digital video.
- New devices can feel old pretty quickly.
- Advertisers should pursue consumers on mobile devices, where they spend much of their time.