



WHITE PAPER

How to Reach Linear & Streaming TV Consumers

Overcome the fragmented TV landscape to reach your target markets across linear, streaming, and digital channels.

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Introduction

Marketers of all types are facing significant challenges when it comes to reaching the right people with the right message across the TV landscape.

Rapidly changing consumer habits are significantly impacting marketers' ability to reach their target audiences. The influx of streaming services available, coupled with an increase in cord-cutting and the impact of the COVID-19 pandemic on American consumers, has resulted in a fragmented TV environment that can be difficult for advertisers to navigate.



You can take marketers' word for it: Fewer than 1 in 10 feel strongly that they have the quality audience data they need to get the most out of their budget.¹ Marketers themselves estimate that 40% of advertising budgets are wasted on the wrong audiences.²

Consider that in 2013, the average American spent 4.5 hours per day watching traditional, linear TV and 46 minutes watching streaming content. Fast-forward to 2022, and they spent approximately 1.5 hours less per day watching linear TV and nearly two hours more per day watching streaming content.³ That streaming time is spent across a variety of platforms, many of which are not available for advertising, or lack the data to prove specific impact.

This leaves marketers grappling with two difficult questions:

1

Which people are most receptive to our message?

2

Where are those people most reachable with advertising?

To maximize impact and minimize waste, these questions need to be answered before any dollars are spent on advertising.

¹ Nielsen 2021 Marketing Report

² Nielsen US Benchmarks Report, Q1 2019-Q1 2020 Data

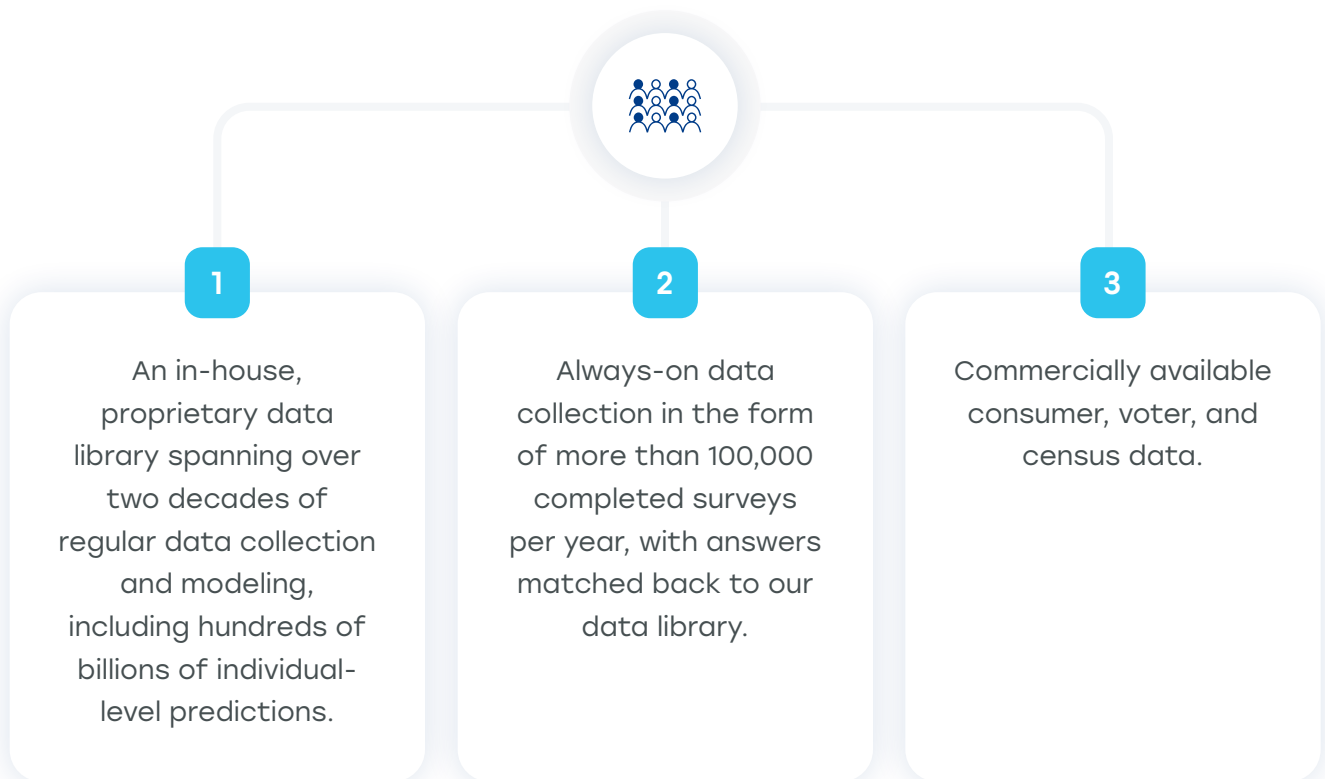
³ Statista: Time spent with digital vs. traditional media in U.S. 2011-2023

While there are many ways to answer these questions, Tunnl's approach is unique in the way that it combines a proprietary data library amassed over 20+ years with observed viewership data from over 35 million American adults. Such granularity equips advertisers with the targeted, timely, and trustworthy insights needed for their messaging to reach the right people at the right time.

Here, we'll explore **four categories of TV viewership**, **each group's value**, and how they work. By the end, you'll understand why **media consumption insights** are essential for getting your message in front of the people who are most likely to care about it.

“Which People Are Most Receptive to Our Message?”

Building or selecting the right audience is foundational to any successful marketing campaign. At Tunnl, we combine the following elements to build out highly accurate, addressable audiences:



When combined, this data produces audiences – a list of addressable individuals – that are receptive to a particular message or issue, meaning they can be persuaded or mobilized to behave a certain way.

“Where Are Those People Most Reachable with Advertising?”

For nearly a decade, Tunnl has specialized in local, audience-based media measurement.

By matching audience data with observed, device-level viewership data from more than 35 million American adults, we produce customized, audience-specific TV ratings for every program on linear TV.

Our proprietary media-measurement system enables us to do this in all 210 local markets, meaning advertisers of all sizes can power their spending decisions with a level of sophistication previously reserved for large, national campaigns.

Previously, this measurement all occurred at the audience level, meaning we could share how likely an audience is to be watching TV at any given time, but not who within the audience was most likely to be watching.

Until now.

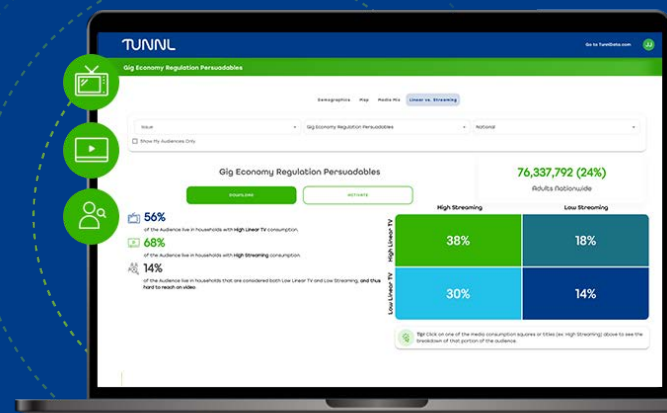
Reaching the Right Audience on the Right Channel

Marketers need to answer two critical questions at the same time:

- Who is most receptive to a message?
- Where can you most likely engage them?

Tunnl uses survey results and our extensive data library to predict the likelihood of every American adult to spend time on both linear TV and streaming TV. With this information, advertisers and agencies are able to strategically target their campaigns based on an audience's:

- Probability to be persuaded or mobilized by a certain message, and
- Probability to consume linear TV and streaming TV



4 Emerging Forms of Viewership

4.5B hours

58% of Americans

75% of all linear TV

Our data indicates that Americans still watch about 4.5 billion hours of linear TV a week, but 58% of Americans watch 75% of all the linear TV consumed. Knowing who these individuals are – and knowing who they are not – allows campaigns to adjust frequencies across channels to be sure the entirety of the audience is being reached and influenced.

MEGA CONSUMERS

High-Linear and High-Streaming Viewers

Some Americans like watching a lot of TV, regardless of how it is delivered to them.

Actually, it's more than some – we put 32% of American adults into this category. These individuals spend significant time watching traditional, linear TV and streaming TV, meaning they are reachable across platforms and can be more easily engaged at a higher frequency by your advertising efforts.



TRADITIONALISTS

High-Linear and Low-Streaming Viewers

Call them old fashioned if you'd like, but these Americans – we put 26% into this bucket – spend significant time watching linear TV and not much on streaming platforms.

The good news? If you are running a linear TV campaign, you are likely to reach them at a significant frequency. However, if you rely mostly on ads on streaming platforms, they are likely to miss your message entirely.



EARLY ADOPTERS

Low-Linear and High-Streaming Viewers

We place 24% of Americans in this group: they watch very little linear TV, but spend a lot of time streaming content.

This doesn't mean they aren't reachable at all on linear TV, but they are likely only found on premium, expensive programming like live sports or other major events. We recommend increasing frequencies to this group specifically on streaming platforms, as they are unlikely to see much linear advertising.



ELUSIVE CONSUMERS

Low-Linear and Low-Streaming Viewers

These Americans – 18% of the population in total – are hard to reach, period. They don't watch much linear TV, and they don't spend much time streaming content.

Identifying them at the individual level, as we have done, is critical. If you need to reach them, you'll have to look outside TV advertising formats to influence them, either on social media, pre-roll, or offline methods like mail, phone, or text.



Applying Viewership Trend Data to Individual Campaigns

Knowing more about your audiences is helpful, but making smart decisions about your audiences is the real goal. How can this information help?

The reality is that every audience and every campaign is different. However, as we have deployed this data for our clients, a consistent theme has developed.

First, marketers must identify which individuals are most receptive to their message, regardless of media-consumption behavior.

Next, they must segment those individuals into media consumption-based buckets. In this way, they can build an omni-channel campaign to **achieve incremental reach** at their desired frequency.



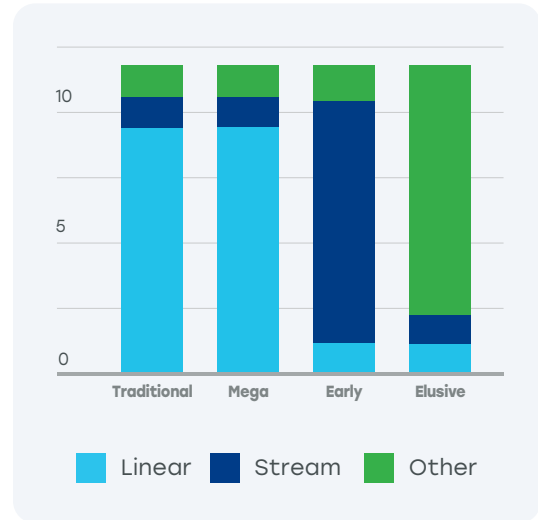
What does that look like? We recommend a waterfall approach, depending on which channels you plan on including in your campaign.

WITH HEAVY LINEAR TV

If traditional, linear TV is a significant part of your plan, you can rely on it to reach most (or all) of your desired frequency to reach both Mega Consumers and Traditionalists.

While you will be able to reach Early Adopters with a small portion of your TV plan – most of these individuals still watch some linear TV – streaming will have to carry the bulk of the load in reaching this audience.

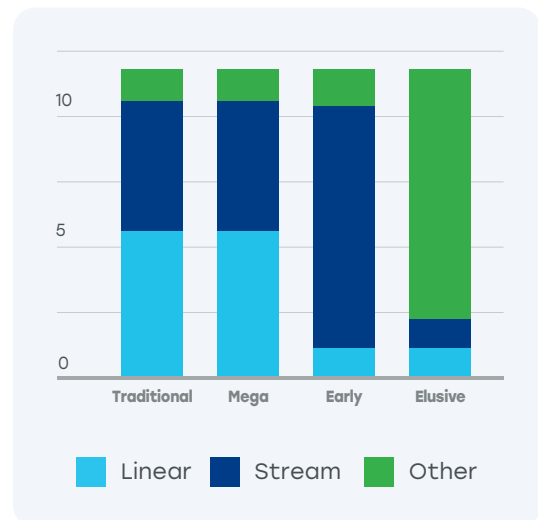
To do that, we recommend advertisers treat this **group** uniquely within their plan at a higher frequency to make up for the frequency not being delivered with your linear plan.



WITH LIGHTER LINEAR TV

If you are able to include linear TV as a portion of your plan, but not the majority, you will be able to partially reach your frequency goal for both Mega Consumers and Traditionalists, with streaming making up the bulk of the difference.

The campaign targeting Early Adopters and Elusive Consumers will look similar to the heavy TV scenario, albeit with linear TV contributing to frequency goals even less.

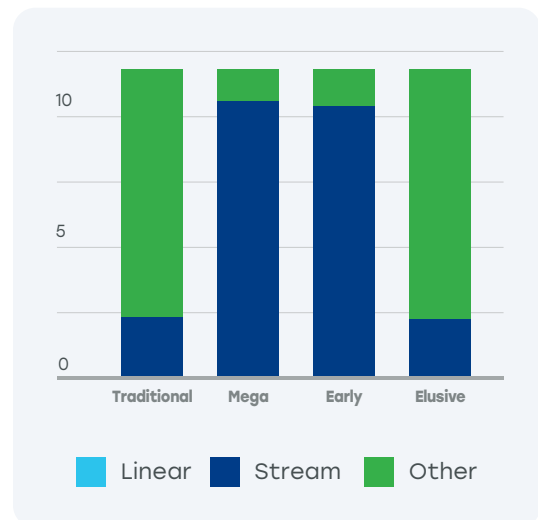


WITH NO LINEAR TV

With no linear TV in your plan, the campaign you deploy to Traditionalists and Elusive Consumers will look identical, while the campaign you deploy for Mega Consumers and Early Adopters will match.

Bear in mind, scale remains a challenge in the streaming environment, especially given how much time spent streaming content exists within **ad free tiers of popular platforms** like Netflix.

Without any linear TV component, advertisers are likely to struggle to reach frequency goals of any scale.



Start Reaching the Right TV Viewers For Your Message

Identifying which Americans fall within which bucket of media consumption is a huge step forward for advertisers, but the magic happens once the audiences described above are overlapped with other message-specific audiences.

Where do the Americans who are most receptive to your message consume video? How are your core audiences broken out across the fragmented media landscape? **Uncovering these insights will empower you with specific data that can maximize your efforts.**

About TUNNL

Only the Tunnl platform delivers actionable audience intelligence to advertisers and agencies. By streamlining optimization, measurement, and incremental reach, our platform provides a pathway for brands and organizations to build meaningful connections with their audiences.

Built on over two decades of data and machine learning on America's attitudes and behaviors, Tunnl is best equipped to help you build better connections. For more information, visit www.TunnlData.com.

Follow this easy roadmap to begin reaching the linear and streaming TV audiences most likely to engage with your message:

1

Find the message-specific audience that's right for you. Your ideal audience may already be available in our library of prebuilt audiences. Get quick and meaningful insights into some of the most sought-after audiences today.

[Explore Tunnl's Prebuilt Audience Suite](#)

Don't see your audience in our library? You may be a good fit for a custom Tunnl audience.

[Learn More About Tunnl's Custom Audiences](#)

2

Measure campaign impressions, unduplicated reach, and average frequency among your target audience on linear TV to identify opportunities for better targeting with Tunnl's audience intelligence platform.

[Discover Tunnl's Linear Optimization Tools](#)

3

Continuously optimize your cross-channel campaigns with the end-to-end planning, measurement, and optimization tools in Tunnl's audience intelligence platform, including linear vs. streaming TV viewership breakdowns for your target audience, on-demand local linear TV ratings, and more.

[Explore Tunnl's Audience Intelligence Platform](#)