The Hulu Audience

Avid fans who represent the **changing face of TV viewing**.

Viewers motivated by **choice and control**.

Young, affluent, **active consumers**.
Transformational TV

Hulu viewers are on the leading edge of the TV viewing behavioral shift, breaking free of program grids and linear cords

20  +  13  +  4  =  33 million

Living Room  PC  Mobile

33 young and affluent viewers

Median Age

$84K Median Income

SOURCE: COMSCORE VIDEOMETRIX MULTIPLATFORM REPORT CUSTOM ANALYSIS, NOVEMBER 2016; Internal Hulu Data, December 2016
When, how, why and where viewers choose Hulu

Hulu viewing by device
TV Has Transformed

Technology has enabled a TV shift back to the living room and Hulu viewers adopted it quickly

- **Living Room**: 75% now vs. 16% in 2014 (+233% growth)
- **PC**: 28% now vs. 54% in 2014 (-26%)
- **Mobile**: 18% now vs. 54% in 2014 (-36%)

**Devices Data**

- **Average Devices a Hulu Viewer Owns**: 7.9
- **Average Devices on Which a Hulu Viewer Streams**: 4.6

Source: Hulu Internal Data, December 2016; Hulu Viewer Survey, Epoll, Jan 2017
TV Has Transformed

Behavioral, demographic & genre differences across platforms

Viewers with a longer tenure with Hulu tend to watch across more devices

Younger male viewers have a high affinity for animation & cartoons, specifically on console devices. The same holds true for edgy workplace comedies.

Serialized dramas are enjoyed by the largest population of Hulu viewers, with the majority viewed on connected TV devices.

Late night series, more commonly viewed by men, are also predominantly viewed on connected devices.

Documentaries are more likely to be streamed in the living room and by older adults.

The news & information category over-indexes on PCs, as most is short form clips. Some reality shows also tend to be viewed more commonly on desktop.

Hulu Latino content is more likely to be viewed on a mobile device, and the same goes for viewing of young female-skewing scripted dramas.

Viewing on tablets over-indexes for older audiences, as do classics and sci-fi shows, which also have high viewership among this demo.
Always On

HOURLY DISTRIBUTION BY PLATFORM

Linear TV peaks at 9pm and quickly drops off.

Mobile has the flattest curve, ramping in the morning and continuing through midday.

PC shows a small bump in viewership during early afternoon hours.

Living Room devices map to the linear viewership curve.

Tablet follows a linear viewing pattern, but with a later peak.

SOURCE: HULU INTERNAL DATA
Always On

HOURLY DISTRIBUTION BY PLATFORM

"I just want to take a shower"

"Wine-o'clock"

"For the love of God, it's still dark out"

SOURCE: HULU INTERNAL DATA
When, how, why and where viewers choose Hulu

Hulu viewers as consumers
**Hulu Viewer Index to Total Pop**

![Image](https://via.placeholder.com/150)

## Consumer Snapshot

<table>
<thead>
<tr>
<th>Lifestage</th>
<th>Shopping Style</th>
<th>Influencer Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>53% <em>are married</em></td>
<td><strong>Swayable Shopaholics (132):</strong></td>
<td><strong>Super Influential Consumers:</strong></td>
</tr>
<tr>
<td></td>
<td>“I’m a spender rather than a saver” (119)</td>
<td>Physical Fitness (150)</td>
</tr>
<tr>
<td></td>
<td>“I am influenced by what’s hot and what’s not” (131)</td>
<td>Healthy Lifestyle (152)</td>
</tr>
<tr>
<td></td>
<td>“I tend to make impulsive purchases” (118)</td>
<td>Cooking (158)</td>
</tr>
<tr>
<td></td>
<td>“I would pay extra for a product that is consistent with the image I want to</td>
<td>Grocery Shopping (202)</td>
</tr>
<tr>
<td>50% <em>have children</em></td>
<td>convey” (116)</td>
<td>Restaurants (192)</td>
</tr>
<tr>
<td>60% <em>are employed full time</em></td>
<td>“I like to change brands often for the sake of variety and novelty” (115)</td>
<td>Computers (156)</td>
</tr>
<tr>
<td>75% <em>live in or around a city</em></td>
<td>“I like to connect with brands through social media” (130)</td>
<td>Home Electronics (231)</td>
</tr>
<tr>
<td>50% <em>have been subscribers for 3 or more years</em></td>
<td></td>
<td>New Technology (221)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Movies (172)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>TV Shows (145)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Internet (205)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Music (180)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parenting (165)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Education (216)</td>
</tr>
</tbody>
</table>

Source: Hulu Viewer Survey, EPOLL, Jan 2017, GfK MRI, Spring 2018
When, how, why and where viewers choose Hulu

How people watch
Where Hulu Fits into the Viewing Landscape

- 70% of 18-34 year olds watch more TV shows on Hulu than TV.
- 73% agree Hulu has excellent or very good quality compared to regular TV.
- 1 in 5 watch Hulu every day.
- 1 in 4 18-34 year olds watch Hulu every day.
- 54% watch Hulu at least 8 hours per week.
- 65% watch TV shows (33% for Netflix).

Source: Hulu Viewer Survey, E-Poll, Jan 2017
Full season banking and weekly release serves the needs of all viewers

51% of total viewers watch 3+ episodes in one sitting at least once a week.

60% of A18-34 year olds.
How People Watch

58% of Hulu viewers watch with someone else at least weekly

WITH WHOM DO YOU TYPICALLY WATCH HULU?

1. Partner or spouse 59%
2. Alone 44%
3. Children 31%
4. Friends 18%
5. Other family members 12%
6. Someone else 2%

SOURCE: HULU VIEWER SURVEY, EPOLL, JAN 2017
When, how, why and where viewers choose Hulu

Why people watch
Key reasons for choosing Hulu fall into five general categories

<table>
<thead>
<tr>
<th>Choice</th>
<th>Convenience</th>
<th>Control</th>
<th>Selection</th>
<th>Ad Load</th>
</tr>
</thead>
<tbody>
<tr>
<td>“I CAN WATCH WHAT I WANT WHEN I WANT”</td>
<td>WATCH ANYWHERE ON ANY DEVICE</td>
<td>FAST-FORWARD,REWIND AND PLAYLIST FUNCTIONALITY</td>
<td>BROAD ARRAY OF PROGRAMMING</td>
<td>FEWER OR NO ADS, RELEVANT TO THE VIEWER</td>
</tr>
</tbody>
</table>
A Day In The Life: Hulu & TV

Viewing choices differ by situation
% SOMewhat / VERY LIKELY

Passive

Neutral

Purposeful

<table>
<thead>
<tr>
<th>Activity</th>
<th>Passive</th>
<th>Neutral</th>
<th>Purposeful</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wake up &amp; Start My Day</td>
<td>55%</td>
<td>37%</td>
<td>67%</td>
</tr>
<tr>
<td>As Background Noise</td>
<td>51%</td>
<td>44%</td>
<td>58%</td>
</tr>
<tr>
<td>Rushed &amp; Have Limited Time</td>
<td>47%</td>
<td>48%</td>
<td>48%</td>
</tr>
<tr>
<td>Exercising</td>
<td>32%</td>
<td>36%</td>
<td>43%</td>
</tr>
<tr>
<td>Sitting Down To Eat</td>
<td>34%</td>
<td>43%</td>
<td>29%</td>
</tr>
<tr>
<td>Get Home From School Or Work</td>
<td>37%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relaxing Before Going To Bed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>On A Lazy Weekend</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

SOURCE: HULU/ARF MOOD & AD RECEPTIVITY STUDY CONDUCTED ONLINE BY LEFLEIN ASSOCIATES, INC. 214/18 - 01/03/17
Why Hulu?

- Controllable: 82% associate with Hulu or regular TV
  - 18% do not

- Convenient: 77% associate
  - 23% do not

- Personal: 76% associate
  - 24% do not

- Fun: 71% associate
  - 29% do not

- Relaxing: 69% associate
  - 31% do not

- Comfortable: 67% associate
  - 33% do not

- Timely: 61% associate
  - 39% do not

- Easy: 60% associate
  - 40% do not

- Social: 53% associate
  - 47% do not

SOURCE: HULU VIEWER SURVEY, EPOLL, JAN 2017
When, how, why and where viewers choose Hulu

The commercial experience
Importance of choice and control extends to the commercial experience

83% think Hulu is a friendlier place due to the lighter ad load

64% agree the ads are more relevant

68% are more likely to watch commercials on Hulu than regular TV
76% among those with low ad receptivity

78% think the commercials on Hulu are less disruptive
85% among those with low ad receptivity

SOURCE: HULU/ARF MOOD & AD RECEPTIVITY STUDY CONDUCTED ONLINE BY LEFLEIN ASSOCIATES, INC 12/14/16-01/03/17
Importance of choice and control extends to the commercial experience

<table>
<thead>
<tr>
<th>Feature</th>
<th>% High Appreciation for Ad Features</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial countdown timer</td>
<td>79%</td>
</tr>
<tr>
<td>Choice of one longer ad at beginning</td>
<td>76%</td>
</tr>
<tr>
<td>Ad selector</td>
<td>67%</td>
</tr>
</tbody>
</table>

Source: Hulu/ARF MOOD & AD RECEPTIVITY STUDY CONDUCTED ONLINE BY LEFLEIN ASSOCIATES, INC 12/14/16–01/03/17
When, how, why and where viewers choose Hulu

Where people watch
Where People Watch

94% of Hulu viewing occurs at home

FREQUENTLY / REGULARLY VIEW

LIVING ROOM 70%
BEDROOM 45%
DEN 17%
KITCHEN 11%
BASEMENT 9%
OUTSIDE 7%
BATHROOM 7%

SOURCE: HULU VIEWER SURVEY, E-POLL, JAN 2017
Hulu subscribers are more likely to view in the bathroom if they:

- Are men
- Have had a Hulu subscription for longer
- Are more satisfied with the service
- Are more affluent
- Are married
- Have children (11% vs 3% for those without kids)
Thank You