2022 Video Consumption Landscape Survey

OCT 26, 2022

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Survey Details

Objectives

Over the past year of COVID-19 impact, the viewing and shopping habits among HK population has transformed significantly. For viewing aspect, with a newcomer of Disney+ and the existing key players (e.g. myTV SUPER, Netflix, Viu, Now E etc.), the OTT market is becoming packed with an abundance of options which further intensify the share of both local streaming and the traditional TV market. Moreover, under a fast growth of social, the way for how audiences consume video contents has expanded from traditional to social environment, thus traditional, digital and social are becoming the new mix of choices empowering by the audiences in anytime at anywhere. For shopping aspect, the growth of e-Commerce after the pandemic has accelerated rapidly, consumers have cultivated a habit or even dependence on online shopping in different perspectives of life. Under the fully connected environment between watch and buy, viewing and shopping are getting closer as never anticipated before.

Specifications

Targets: HK Citizens aged 15 to 64 who have ever watched any TV or online video in the past 7 days. Sampling: n=2,538 (±1.93%) with quota on age & gender to well representative for HK population. Fieldwork: Jul 12 to Aug 5, 2022
Methodology: Hybrid with mix of online and offline approaches

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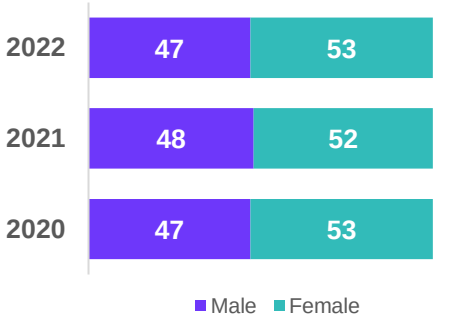
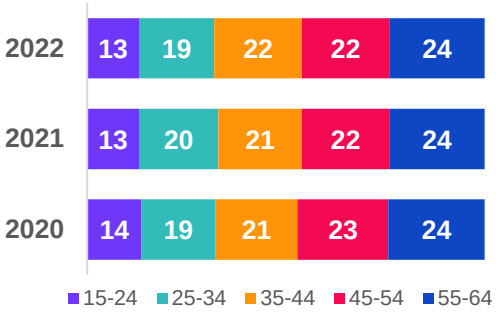
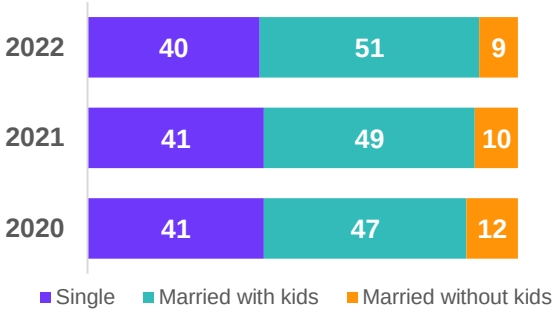
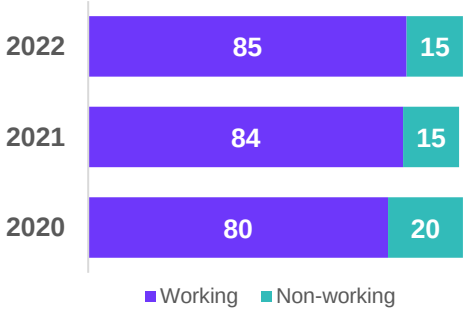
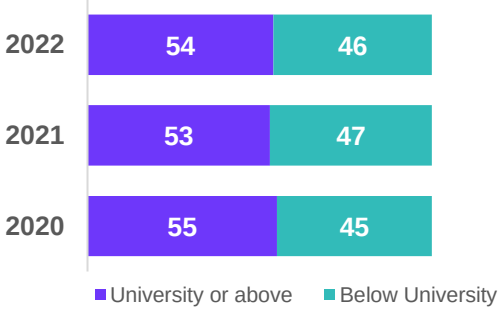
Respondent key profile remains across years

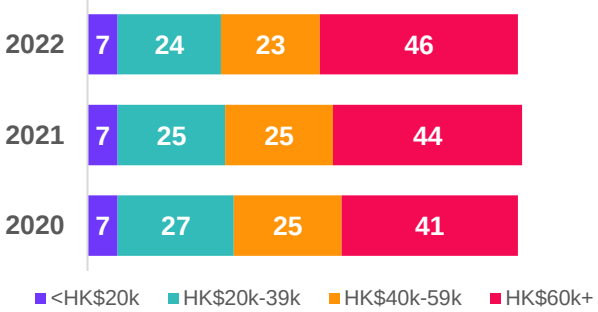












Base: Hong Kong Citizen aged 15-64 who have watched any online or offline video content in the past 7 days
2022 (n=2,538); 2021 (n=2,556); 2020 (n=2,574)

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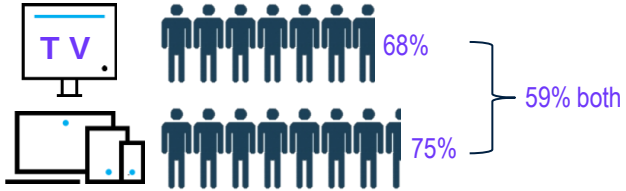
Video Consumption Landscape 2022

Video Consumption Landscape 2022

- Target Incidence: 99% Mass population viewed Video Content in the Past 7 Days
- 83% of them are Daily Viewers



- 9.7 media platforms watched weekly on average
- 246 minutes (-6%) daily average they spent on video contents, from both offline and online
- On average 2.5 audience co-viewing for consuming big-screen

HONG KONG

Source : 2022 Video Consumption Landscape Survey (n=2,538 Aged 15-64 General Video User for HK local population in the past 7 days)

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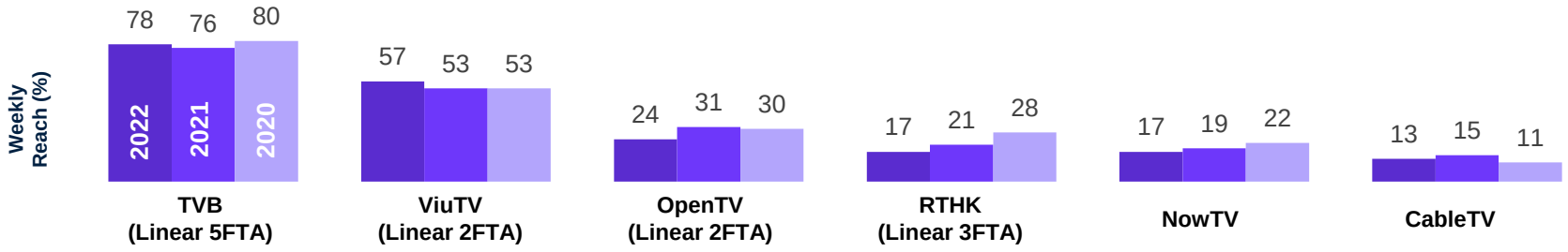
Video landscape – TV (Free + Pay TV)

- TVB linear is leading significantly in the TV landscape in terms of reach, frequency and time spent
- TV viewership has been shifted slightly to watch more frequent while less amount of daily time spent per viewer

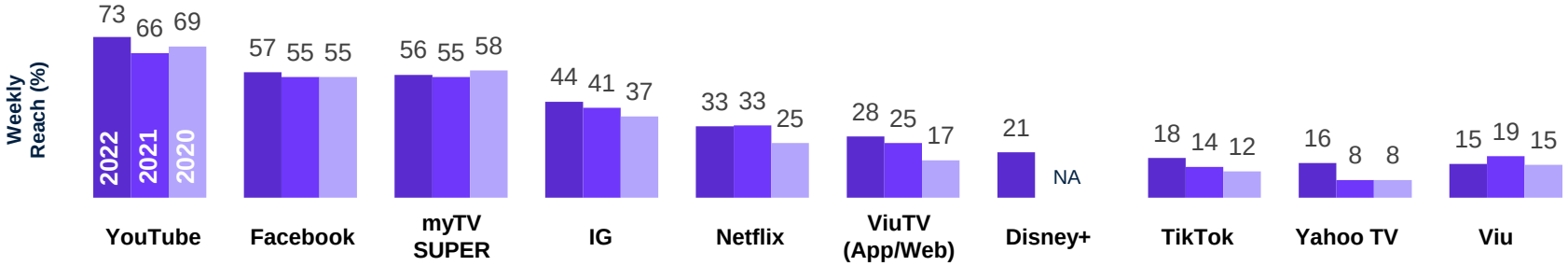


Weekly reach - Base: All respondents; 2022 (n=2,538); 2021 (n=2,556); 2020 (n=2,574)
Frequency & Time spent - Base: All respondents who have watched video content on the respective channels in past 1 months

Video landscape – Digital (OTT + Social)

- Social media players (e.g. YouTube / Facebook) is leading in reach and frequency while OTT platform (e.g. myTV SUPER / Netflix) with long format ranks to the top in time spent

Top 10 consumptions



Weekly reach - Base: All respondents; 2022 (n=2,538); 2021 (n=2,556); 2020 (n=2,574)
Frequency & Time spent - Base: All respondents who have watched video content on the respective channels in past 1 months

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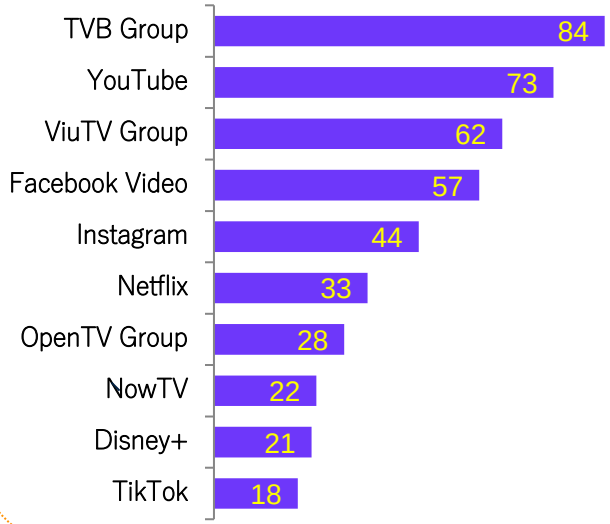
Video landscape – Overall

- Overall viewing behavior back to year 2020 that audience tend to reach more different players for various entertainment, drama, news or infotainment contents. An average 9.7 platforms has been reached on weekly basis, which means the daily time spent for each of the platform might not as high as before.



	Intensity #Day a Week	Time Spent Min Daily Ave
TVB Group	#1 6.0	237 mins #1
YouTube	#2 5.3	65 mins
ViuTV Group	4.5	75 mins #2
Facebook Video	#3 5.1	37 mins
Instagram	4.9	41 mins
Netflix	4.5	69 mins #3
OpenTV Group	3.4	33 mins
NowTV	3.7	46 mins
Disney+	3.4	34 mins
TikTok	3.6	33 mins

Reach	Frequency	Time Spent
TVB, myTV SUPER	TVB, myTV SUPER	TVB, myTV SUPER
YouTube	YouTube	viuTV
viuTV	Facebook	NETFLIX

TVB Group: TVB Linear Ch81-85, myTV SUPER; ViuTV Group : ViuTV Ch96,99, Blue ViuTV App/web; Open TV Group: OpenTV Ch76, 77, OpenTV App/web
Weekly reach - Base: All respondents; 2022 (n=2,538); 2021 (n=2,556); 2020 (n=2,574)
Frequency & Time spent - Base: All respondents who have watched video content on the respective channels in past 1 months

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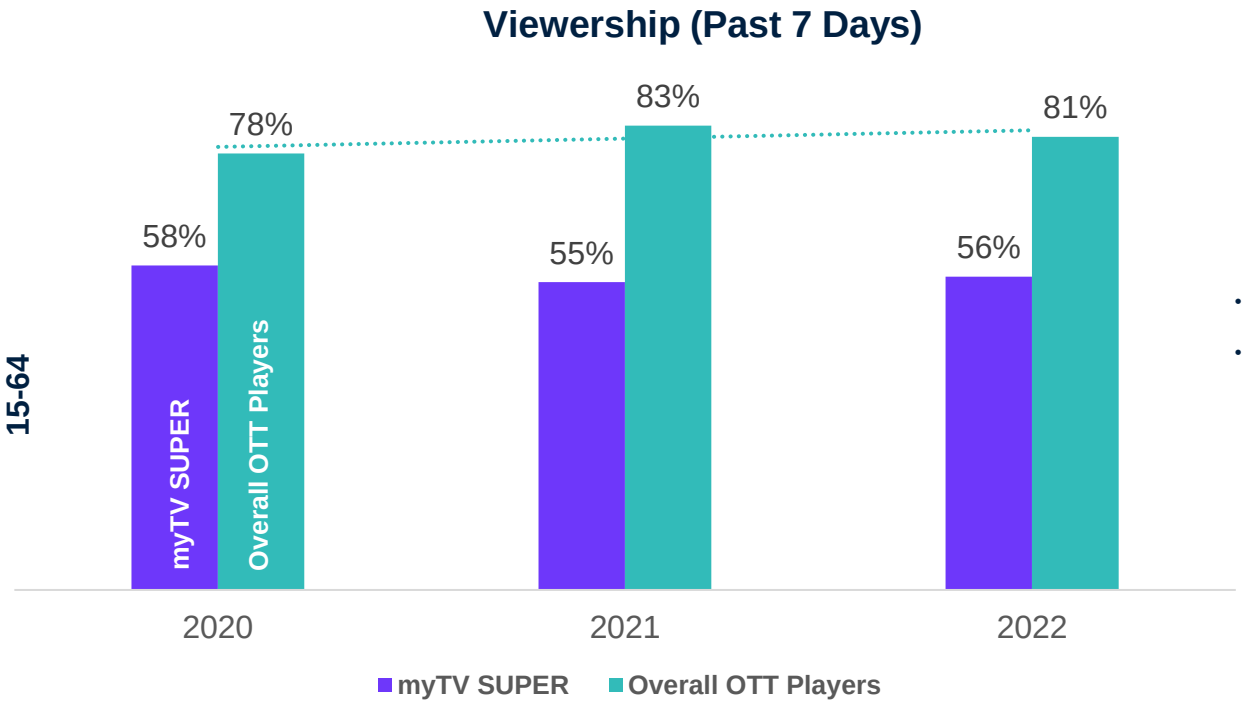
OTT viewership became the mainstream for HK market

- Viewership of overall OTT players in past 7 days remains in a higher penetration since 2020
- myTV SUPER is still enjoying the leading position among OTT players in HK



- **myTV SUPER:** OTT + APP + Web
- **Overall OTT Players**: myTV SUPER, ViuTV (APP + Web), Viu, Netflix, Disney+, Now E, HBO GO, iQiyi, Tencent Video, Youku, Qianxun, Bilibili, OpenTV (APP + Web), RTHK (APP + Web), Apple TV, HMVOD

Q9. 請問你最近什麼時候用以下媒體收看電視節目或影片
Base: All respondents; 2022 (n=2,538); 2021 (n=2,556); 2020 (n=2,574)

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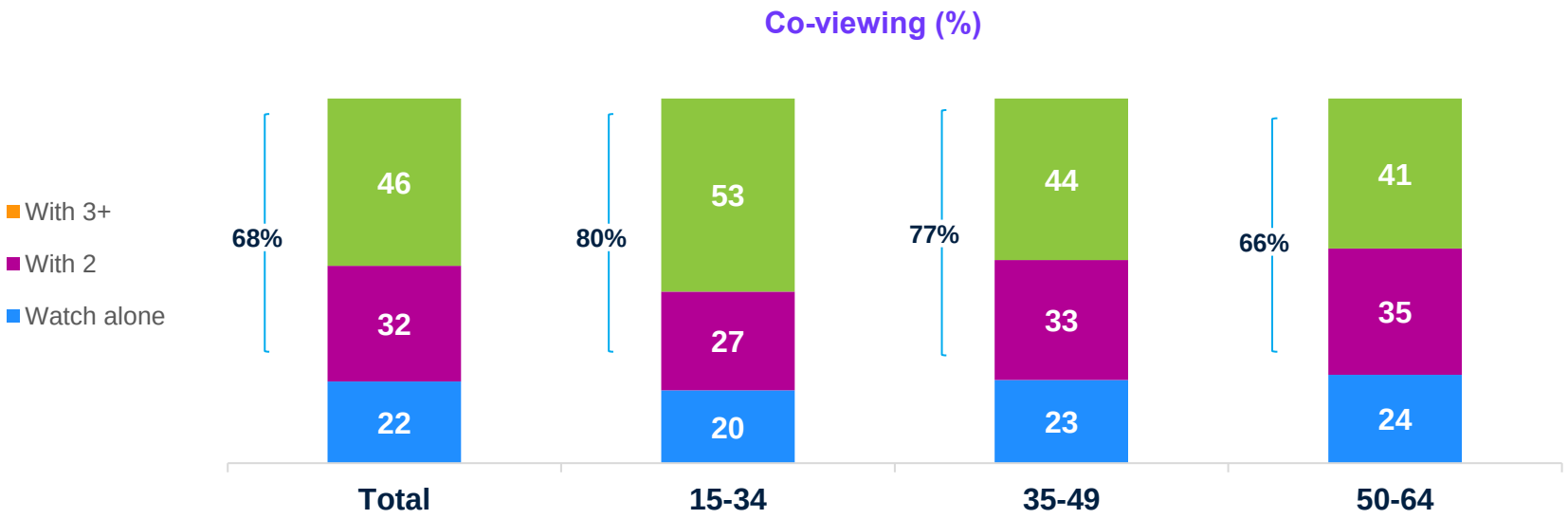
Co-viewing for consuming by big screen

- On average, 2.5 audiences are watching together for TVB content in front of big screen



Total	15-34	35-49	50-64
Average number of viewers	Average number of viewers	Average number of viewers	Average number of viewers
2.5 audiences	*2.7 audiences*	*2.5 audiences*	*2.4 audiences*

Q16.一般來說，你會與多少人（包括家人朋友等）一齊在電視大螢幕前收看TVB 或 myTV SUPER的節目呢?
Base: Respondents who have ever watched TVB or myTV SUPER connected TV
Total: (n=2,474); 15-34: (n=778); 35-49: (n=812); 50-64: (n=884)

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Exposure of the Official Platforms in YouTube, Facebook & Instagram

- 2 out of 3 audience has reach any content from Broadcasters' Social platforms in the past week
- TVB Group (54%) including the net from various official TVB channels & pages gained the largest reach in social
- ViuTV (47%) has the largest reach of their official website / channel under social media, followed by #2 TVB and #3 myTV SUPER

Aged 15-64

Channel watched in Social (%) past week

66% Any Broadcasters social page

54% Any TVB social page

53% Any PCCW social page

42% Any iCable social page

TVB Social: TVB, myTV SUPER, TVB Variety, J2, SeeSaw先
PCCW Social: ViuTV, NowTV
iCable Social: OpenTV, Cable TV

	YouTube	facebook	Instagram
Any Broadcaster	58%	57%	46%
Any TVB	46%	45%	35%
Any PCCW	43%	39%	35%
Any iCable	32%	31%	27%

Q41abc.過去一星期，請問你有沒有在YouTube / Facebook / Instagram 瀏覽過以下電視台的官方頁？*Base: All respondents (n=2,538)*

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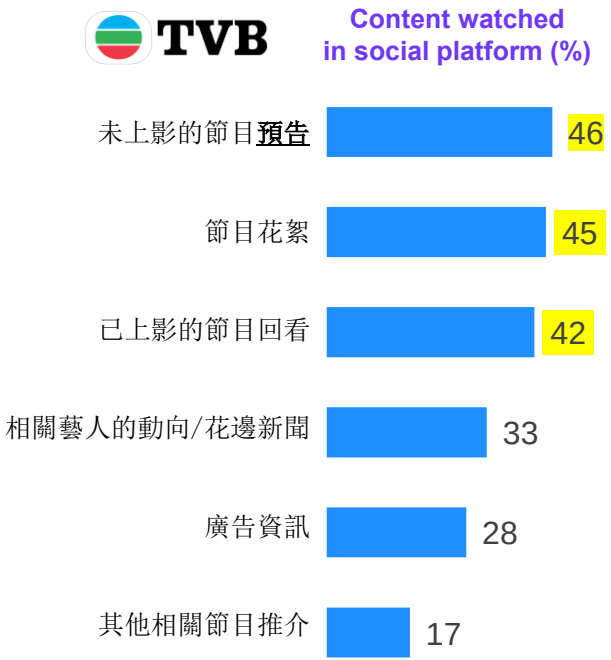
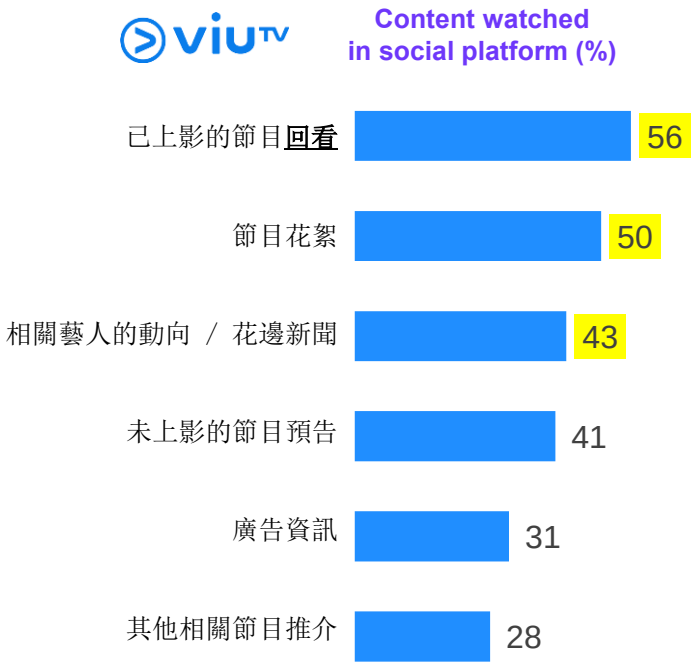
Audience focus on various content on Social

- Clipping on Coming Program (46%), Program Highlights (45%) & Review (42%) are the most common content TVB/myTV SUPER audience focusing on their social channels. Audience has curious on the further coming programs for TVB
- Program Review (56%), Highlights (50%) and Artist News (43%) are exposed to their social audience





Q42H1. 請問你在各社交媒體收看過 TVB / myTV SUPER以下那些內容？
Q42H2. 請問你在各社交媒體收看過 ViuTV 以下那些內容？
Base: All respondents who have watched TVB / myTV SUPER contents in any social platforms (n=1,361)
Base: All respondents who have watched ViuTV contents in any social platforms (n=1,200)

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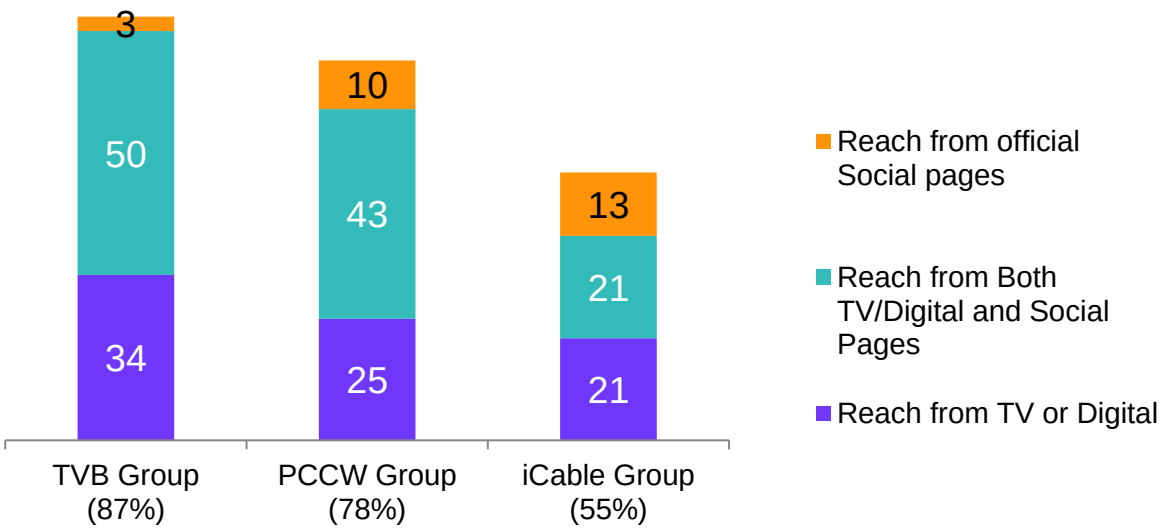
Multi-platform Weekly Reach

- TVB Group gained the highest weekly reach for the TV Linear / myTV SUPER / TVB Social Pages (87%)
- 58% TVB audience would view the program content AND followed their social pages (i.e. 50/87), which is the highest among 3 broadcasters
- PCCW Group with 78% weekly reach from the net of their TV program viewers or Social page viewers, 10% of PCCW reach is only viewing their social pages
- iCABLE Group with 55% weekly reach from their TV program viewers or Social page viewers, 13% of their audience only reaching by the social pages



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TVB Linear Audience Characteristic (78% Weekly Reach)

- 65% daily TVB viewers & spent 174min on TVB programs
- Financially tends to be stability & in conservative manner
- Attention on health & willing to spend on healthy products

TVB

Demographic & Household Characters

- **Female (53%), Male (47%)**
- **A15-34 (29%), A35-49 (32%), A50-64 (39%)**
- **Living with families (HH3+ 75%)**
- **Married (64%) and 86% with kids & 20% parents spends HK$2,665 on kids' tutor classes. 5.6%. 12% married female planning for pregnancy**
- **Working (84%), PMEB (43%)**
- **MPI $34,154 & MHI $70,662**

62% Insurance products
61% Stock or bonds
32% Foreign Currency Acct
64% Saving products
30% Virtual bank account

60% Attention on health
56% Spent on supplements
Monthly spending HK$1,344

Nielsen

myTV SUPER Audience Characteristic (56% Weekly Reach)

- 37% daily SUPER viewers & spent 87min on the Connected TV platform(s) including Connected TV, App, Web
- Connected TV is the most popular vehicle (80% reach among the platform)
- Knowledge on investment & wealthy management, with various investment accounts
- Attention on healthy & family, tends to have kids and willing to spend on them
- Audience skewed to consumerism

Demographic & Household Characters

- **Female (55%), Male (45%)**
- **A15-34 (25%), A35-49 (33%), A50-64 (42%)**
- **Living with families (HH3+ 75%)**
- **Married (70%) and 90% with kids & 24% parents spends HK$2,688 on kids' tutor classes. 13% married female planning for pregnancy. 22% parents have sent or plan to send kids study aboard**
- **Working (86%), PMEB (49%)**
- **MPI $37,877 & MHI $78,355**

88% Grocery shoppers
83% Head of household
HK$2,288 monthly on grocery

79% Wealthy management
(premium banking acct, investment account, private banking…etc.)

40% Private property
Average HK$890k liquid assets

Willing to invest time & money for self improvement. Average allocated HK$24,226 on advanced study annually

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ViuTV Audience Characteristic (62% Weekly Reach)

- 45% daily ViuTV viewers & spent 56min daily on Ch.96/99
- Audiences are the key members of their household, has decision power on household items
- Financially tends to be stable and willing to try new finance products

Demographic & Household Characters

- **Female (54%), Male (46%)**
- **A15-34 (35%), A35-49 (37%), A50-64 (28%)**
- **Married (60%) and 84% with kids & 21% parents spends HK$2,697 on kids' tutor classes. 16% married female planning for pregnancy.**
- **43% audiences has plan to migrant to other countries**
- **Working (87%), PMEB (46%)**
- **MPI $35,213 & MHI $71,438**

87% Grocery shoppers
77% Head of household
HK$2,216 monthly on grocery

65% Insurance products
61% Stock & Bonds
78% Wealthy management
(premium banking acct, investment account, private banking…etc.)
35% Virtual Bank

58% Spent on supplements
Monthly spending HK$1,370

YouTube Audience Characteristic (73% Weekly Reach)

- 67% daily YouTube viewers & spent 65min daily on YouTube channels
- Less consumerism on household & durable items then TV audience
- Financially tends to be stable and willing to try new finance products

Demographic & Household Characters

- **Female (52%), Male (48%)**
- **A15-34 (37%), A35-49 (34%), A50-64 (29%)**
- **Married (56%) and 84% with kids & 19% parents spends HK$2,590 on kids' tutor classes. 15% married female planning for pregnancy.**
- **Working (85%), PMEB (43%), Students (6%)**
- **MPI $33,891 & MHI $68,571**

63% Insurance products, average annual insurance fee HK$23,216

60% Stocks & Bond
34% with Virtual Bank
17% Personal loan (low end)

Relatively careful budget for household durable or unnecessary replacement

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Facebook Audience Characteristic (57% Weekly Reach)

- 68% daily Facebook users & spent 37min daily on Facebook Videos
- Similar audience characters as ViuTV
- Audiences are the key members of their household, has decision power on household items
- Financially tends to be stable and willing to try new finance products

Demographic & Household Characters

- **Female (55%), Male (45%)**
- **A15-34 (34%), A35-49 (37%), A50-64 (29%)**
- **Married (60%) and 83% with kids & 22% parents spends HK$2,629 on kids' tutor classes. 16% married female planning for pregnancy.**
- **Working (87%), PMEB (44%)**
- **MPI $34,298 & MHI $69,718**

87% Grocery shoppers
76% Head of household
HK$2,168 monthly on grocery

66% Insurance products,
average annual insurance fee
HK$23,391

67% Saving products
18% Personal Load (low end)
35% with Virtual Bank

Attention on healthy products,
58% consumed with average
monthly HK$1,293

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Instagram Audience Characteristic (44% Weekly Reach)

- 61% daily Instagram users & spent 41min daily on IG clippings
- With younger audience among video content platforms
- Financially willing to adapt to new products and loan products
- Interest to have various types of consumption with careful calculated budget

Demographic & Household Characters

- **Female (56%), Male (44%)**
- **A15-34 (49%), A35-49 (33%), A50-64 (18%)**
- **Married (48%) and 83% with kids & 22% parents spends HK$2,637 on kids' tutor classes. 20% married female planning for pregnancy.**
- **45% audiences has plan to migrant to other countries**
- **Working (85%), PMEB (44%)**
- **MPI $33,737 & MHI $69,409**

85% Grocery shoppers
73% Head of household
HK$2,099 monthly on grocery

40% with Virtual Bank, most common brands are ZA Bank (19%) and MOX Bank (19%)

20.3% with P Loan, which on the high side comparing with the audience of YouTube and Facebook. (UA 26%, Public 24%)

Audience Preferences

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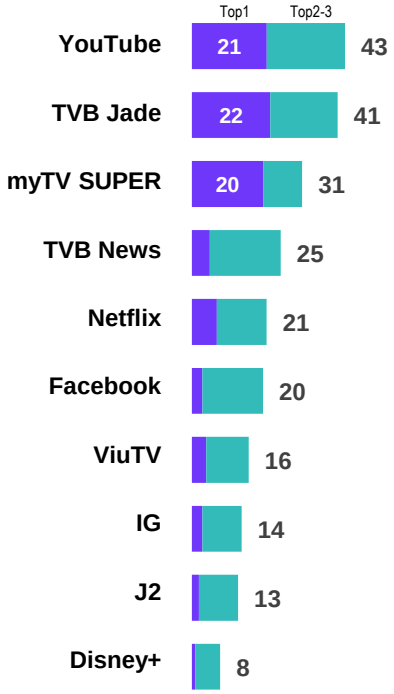
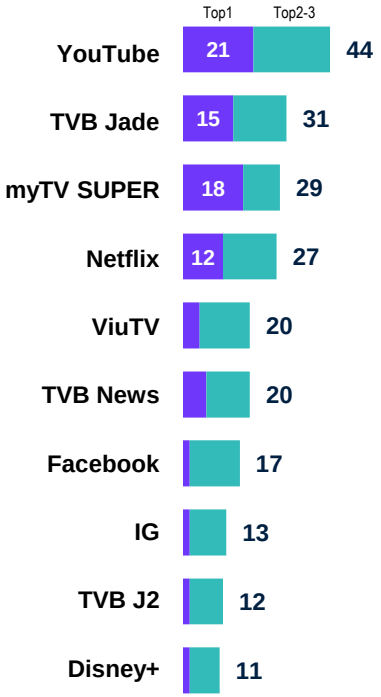
Audience Preferences Towards Different Media Platforms

- YouTube, TVB Jade and myTV SUPER are the Top 3 choices for the “Most Often”, “Most Favorable”
- ViuTV and Netflix brand preferences slightly drop out from the top 3 position in 2021

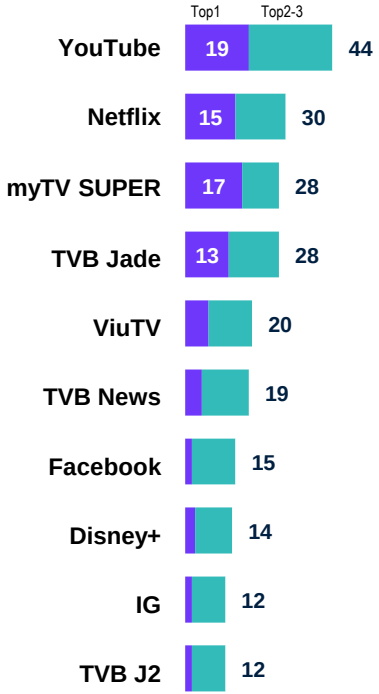
最常用(%)



最喜歡(%)



會推薦 (%)



Yr2021		
最常用	最喜歡	會推薦
YouTube	YouTube	YouTube
Jade	Jade	Jade
myTV SUPER	ViuTV	ViuTV
ViuTV	myTV SUPER	myTV SUPER
TVB News	Netflix	Netflix

Top 1 Ranking Top 2/3 Rankings

Q12b/c/d. 請問你最常用/最喜歡/會推介的三大媒體是？請由1-3排序
Base: All respondents (n=2,538)

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Brand Preference

Overall speaking, brand perception of TVB group has been enhanced positively when compared key competitors, below are key attributes for each player in overall……

Brand Preference Related to Content (Top 5 Ranked)

	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5
節目普遍適合各類型觀眾收看	TVB, MyTV SUPER	YouTube	viuTV	NETFLIX	Disney+
節目種類多樣化	YouTube	TVB, MyTV SUPER	NETFLIX	viuTV	Disney+
形象正面，適合一家大細收看	TVB, MyTV SUPER	Disney+	viuTV	YouTube	NETFLIX
有我喜愛/切合我口味的節目	YouTube	NETFLIX	TVB, MyTV SUPER	viuTV	Disney+
能提供最新最貼市場的財經資訊	TVB, MyTV SUPER	CABLE TV	YouTube	viuTV	now TV
節目具有話題性, 能引起大眾討論	TVB, MyTV SUPER	viuTV	YouTube	NETFLIX	Disney+
節目的資訊性夠全面	TVB, MyTV SUPER	YouTube	viuTV	NETFLIX	CABLE TV

Brand Preference

In general, audience feeling positive and trustful on advertisement via TVB group platform

Brand Preference Related to Advertising Impact (Top 5 Ranked)

	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5
為我購物提供具價值的參考資訊	TVB MyTV SUPER	YouTube	viuTV	now TV	CABLE TV
提升我對產品的認知度	TVB MyTV SUPER	YouTube	viuTV	CABLE TV	viu
廣告產品的品牌形象正面	TVB MyTV SUPER	viuTV	YouTube	CABLE TV	viu
出現的廣告我會特別信任 出現的廣告大多數都和我相關	TVB MyTV SUPER	viuTV	YouTube	now TV	CABLE TV

Brand Preference

TVB Group gained the top ranking for the images related to local society, local story & resonance to the audience

Brand Preference Related to Image (Top 5 Ranked)

	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5
係香港人的媒體	TVB MyTV SUPER	viuTV	CABLE TV	YouTube	now TV
同聲同氣 關注社會 緊貼時事	TVB MyTV SUPER	viuTV	YouTube	CABLE TV	now TV
引起共鳴	TVB MyTV SUPER	YouTube	viuTV	NETFLIX	viu

Brand Preference

Netflix has the strong preference from audience over their UI and Subscription offering

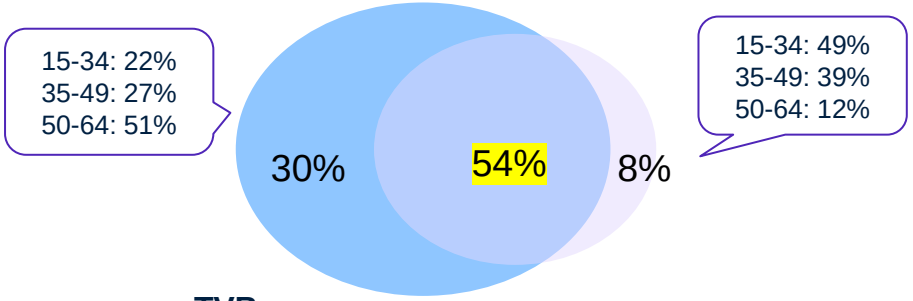
Brand Preference Related to UI and Subscription (Top 5 Ranked)

	Rank 1	Rank 2	Rank 3	Rank 4	Rank 5
能夠推介合心水的節目俾我睇	NETFLIX	YouTube	TVB / MyTV SUPER	Disney+	viuTV
推薦內容個人化, 大多數與我看過的相關	YouTube	NETFLIX	TVB / MyTV SUPER	Disney+	viuTV
收費合理	NETFLIX	MyTV SUPER	Disney+	Premium	CABLE TV
相比其他收費平台, 佢既價格有競爭力	NETFLIX	MyTV SUPER	Premium	Disney+	viu

Audience Duplication among TVB group and ViuTV, YouTube

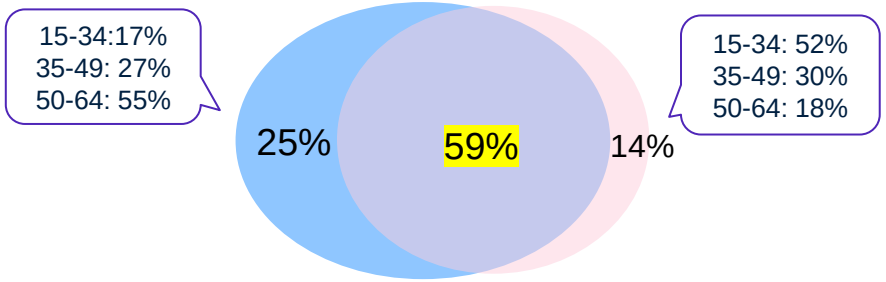
- 87% of ViuTV Linear + Digital viewers can be gained by TVB platforms
- 81% of YouTube viewers can be gained by TVB platforms

TVB vs. ViuTV



TVB Linear + Digital	ViuTV Linear + Digital
84%	62%

TVB vs. YouTube



TVB Linear + Digital	YouTube
84%	73%

Q9. 請問你最近什麼時候用以下媒體收看電視節目或影片
Base: All respondents (n=2,538); 15-34 (n=814); 35-49 (n=831); 50-64 (n=893)

- **TVB:** 5FTA + myTV SUPER
- **ViuTV:** 2FTA + App + Web

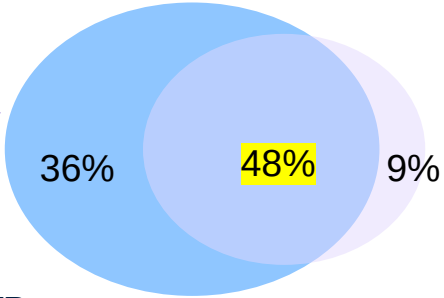
Nielsen

Audience Duplication among TVB group and Facebook, Instagram

- 84% of Facebook video viewers can be gained by TVB platforms
- 80% of Instagram viewers can be gained by TVB platforms

TVB vs. Facebook Video

15-34: 26%
35-49: 27%
50-64: 47%



15-34: 49%
35-49: 34%
50-64: 17%

TVB Linear + Digital

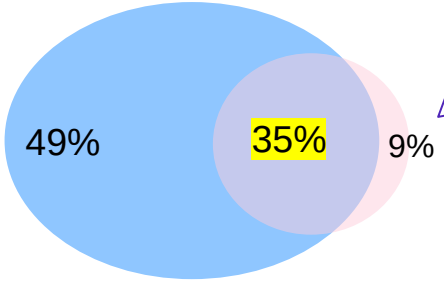
84%

Facebook Video

57%

TVB vs. Instagram

15-34:16%
35-49: 32%
50-64: 52%



15-34: 63%
35-49: 27%
50-64: 10%

TVB Linear + Digital

84%

Instagram

44%

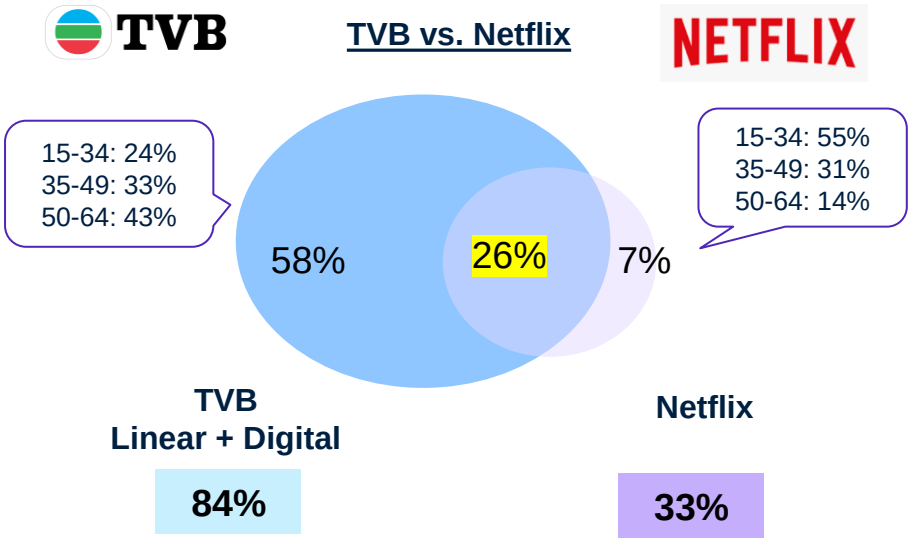
Q9. 請問你最近什麼時候用以下媒體收看電視節目或影片
Base: All respondents (n=2,538); 15-34 (n=814); 35-49 (n=831); 50-64 (n=893)

Nielsen

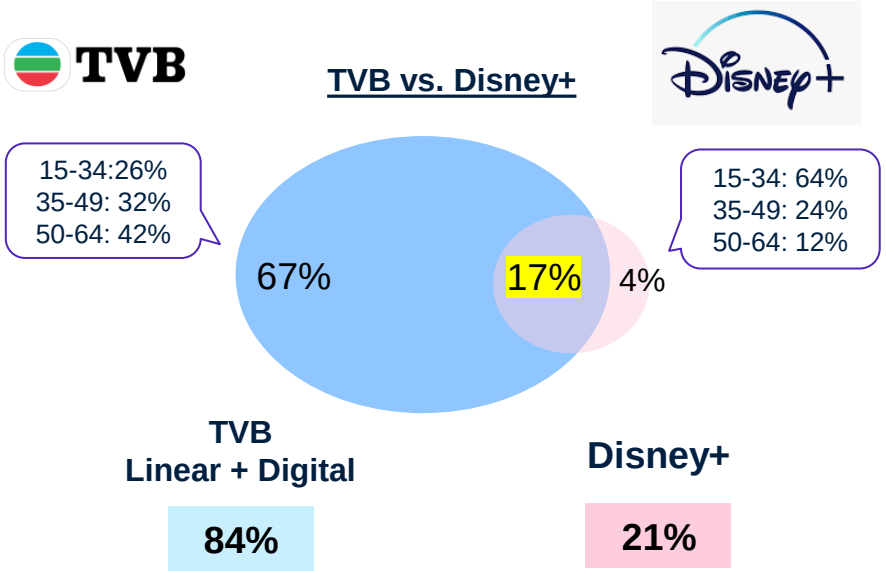
Audience Duplication among TVB group and Netflix, Disney+

- 79% of Netflix viewers can be gained by TVB platforms
- 81% of Disney+ viewers can be gained by TVB platforms

TVB vs. Netflix



TVB vs. Disney+



Q9. 請問你最近什麼時候用以下媒體收看電視節目或影片

Base: All respondents (n=2,538); 15-34 (n=814); 35-49 (n=831); 50-64 (n=893)

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myTV SUPER Audience

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myTV SUPER Audiences are……

56% have watched in *past week*

65% have watched in *past month*

87 mins (91) daily time spent per viewer

37% (20%) viewers watch everyday

Viewers watch **4.3 days (3.8)** a week on average

( ) is 2021 data

Both 3 platforms: 39% (22% in Yr2021)

45% Both (28% in Yr2021)

68% APP (53% in 2021)

80% Connected TV (80% in 2021)

53% Web (37% in 2021)

52% Both (37% in 2021)

42% Both (27% in 2021)

Q9. 請問你最近什麼時候用以下媒體收看電視節目或影片 / Q10. 一般來說，你透過以下媒體收看電視或影片有幾頻密 / Q11.平均來說，在你有收看的日子,你每天花幾多時間收看各影視平台的節目/影片?
Base: All respondents who have watched any video in myTV SUPER (connected TV/app/web) in past 1 month (n=1,653)

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myTV SUPER AUDIENCE ARE…

Gender

45% vs **55%**

(-3pts) *(+3pts)*

Age

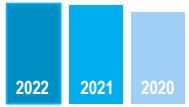
8% A15-24 *(-3pts)*
18% A25-34 *(+1pts)*
21% A35-44 *(+1pts)*
23% A45-54 *(-1pts)*
31% A55-64 *(+3pts)*

University

50% 48% 50%

Working

86% 85% 79%



PMEB

49% 46% 41%

Married

70% Married

9 out of 10 have Kids and 24% sending kids to tutor class

Grocery Shoppers

88%

HK$2,288 monthly average spending on grocery

Wealth Management

79%

Owned Premium banking account, investment account, private banking, wealth management acct

Healthy & Supplement

56%

HK$1,579 monthly average spending on healthy products

Private Property

40%

with liquid assets HK$890k excluding the property owned

Source: 2022 Video Consumption Landscape Survey (n=2,538) Aged 15-64 HK Citizen who watched any online or offline video in the past 7 days)
Base: All viewers who have watched myTV SUPER content (Connected TV/App/Web) in the past 7 days; 2022 (N=1,423); 2021 (N=1,410); 2020 (N=1,496)
** Source: HK Census and Statistics Department*

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Key Takeaway

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Key Takeaway

TVB is the most effective media

- TV continue to be a significant piece of an effective marketing strategy because it is one of the most efficient way to reach widespread audience via the high penetration. From the brand preference study, free TV ranked the top positions in terms of Content, Advertising Impact & Images allow a positive outcome for brands using these TV media

Take advantages of changing habits in the video consumption, leverage on measurement & analytics

- While audience engage in some form of stay-at-home living and the acceleration of digital adoption through the pandemic life, media consumption is changing dynamically. It's critical to monitor closely each media penetration & their incremental reach study, so to maximize the ad budget in reaching your target consumers, to ensure you are deploying every dollar effectively.

Optimizing the offline and online media mix

- Video Consumption are getting more fragmented, it's essential to use data for scenario planning to achieve a good mix of media vehicles including both TV and Digital. Break the segments of your target audience down based on specific demographic and psychographic data. More consideration on the primary campaign ROI during the planning; for example a brand building campaign may consider the Ad trust-in level of the media in the media mix.

TV and social Integration

- Combining social integration into TV experience is one of the multi-screen strategy, particularly effective for the A18-35 audience

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