

1H 2021

— THE —
[TV]
VIEWERSHIP
REPORT



CONTENTS

Executive Summary	3
Introduction	5
Time Spent with TV	6
How TV Viewers View	10
Effectv Insights: Be Everywhere The Consumer Is	13
Summary	23
Contributors	24

THE CURRENT STATE OF TV VIEWING ACROSS THE COMCAST FOOTPRINT

In this edition of The TV Viewership Report, we explore viewership trends for the first half of 2021 (1H '21). Where relevant, we compare current findings to those of the same period from the previous year.

The tumult of events ranging from the [global pandemic](#) to political conflict last year continue to shape viewership patterns and behaviors in 2021. Live viewing grew as a percentage of total time spent with TV. Shifting restrictions on travel and public gatherings likely contribute to both the continuing strength of live TV and shifts in where that content gets consumed.

Content consumption continues to ebb and flow overall, as audiences choose what, when and where they watch. The TV screen is still the preferred device for viewers—Effectv aggregated ad exposure data shows 76% of streaming consumption happening on the big screen. Given its rising scale, we also explore in this report the importance of streaming and its role in aggregating reach for advertisers.

Audiences will seek out premium content in the way that works best for them, presenting an opportunity for marketers to use streaming as a complement to traditional TV advertising.

Please note: we use the phrase “traditional TV” alongside “streaming” throughout this report as a way to distinguish between TV content delivered via over-the-air, cable and satellite versus through IP/digital means. In labeling it “traditional,” we are referring purely to content delivery as opposed to advertising techniques as traditional TV, through the use of advanced data, has become a more dynamic, sophisticated channel for marketers.

1H 2021 KEY FINDINGS

- 01** Comcast households (HHs) are spending on average 6 hours and 2 minutes with TV daily.
- 02** Cable TV's share of TV viewing remains strong at 70% vs. broadcast and premium.
- 03** 88% of all TV viewing happened live throughout the first half of 2021, slightly higher than the same time period last year.
- 04** For Effectv campaigns, a vast majority of streaming impressions (76%) happen on the TV screen.
- 05** Streaming is the perfect complement to a TV advertising campaign. Streaming impressions are 209% more likely to be viewed by light- or no-TV viewing HHs.



TIME SPENT WITH TV SHIFTING TOWARDS LIVE VIEWING

1H '21 has been a time of ups and downs for TV viewership. HHs spent an average of six hours and two minutes watching TV each day. And cable TV accounted for 70 percent of that time, a strong share. However, while those viewers watched TV for nearly six-and-a-half hours daily during Q1 '21, that number declined to just over five-and-a-half hours in Q2 '21.

There's more to this shift than initially meets the eye. Just as the pandemic shifted viewer behaviors significantly in 2020, by March 2021, other pandemic-related shifts were gaining momentum. Millions got vaccinated, and locales and venues began to explore paths toward reopening. It is quite possible that some TV viewership shifted to more public and shared venues, from eating and drinking establishments to fitness facilities, as well as on-the-go and streaming options.

Throughout these shifts, there has been one clear constant: demand for live content. Live viewing accounted for 88% of time spent with TV during 1H '21. This is up slightly from the strength live viewing demonstrated in 1H '20 (86%).

Viewers spread their consumption of premium video content across multiple networks and devices, and across different times of day. Some 70% of live viewing occurred outside of primetime hours. The top five networks accounted for only 31% of all viewing in 1H '21. Comcast HHs watched an average of 30 different networks during this period, with 304 different networks achieving "most-watched" status. And even as streaming to various connected devices grew in popularity, many viewers consumed the majority of streaming content via their TVs.

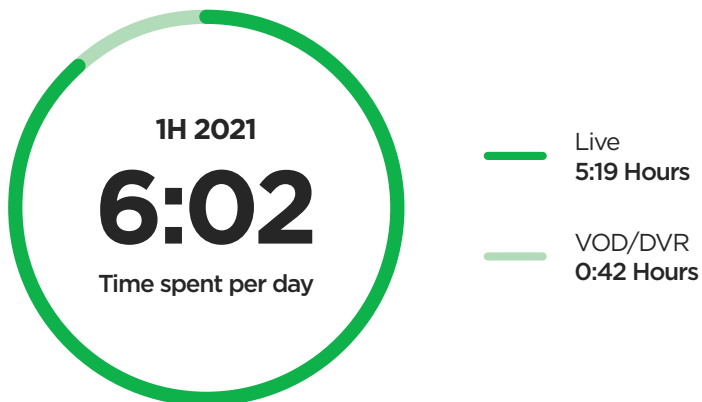
The data in this report will look at how and where TV audiences are spending their time by aggregating data from more than 17 million Comcast HHs across 65 markets. Additionally, the data is based on 15 billion viewing hours.

This report, published bi-annually, provides insights to help marketers use TV's reach and precision to be more effective in delivering results than ever before.

TIME SPENT WITH TV REMAINS STRONG

HOUSEHOLDS SPENT ON AVERAGE 6 HOURS AND 2 MINUTES VIEWING DAILY.

In the first half of 2021, live TV viewing accounted for 88% of daily viewing time, with VOD/DVR accounting for 12%.*



TIME SPENT WITH TV SHIFTING TOWARDS LIVE VIEWING

Looking at the trend of live viewing share in 1H for the past three years, 1H 2021 has the highest percentage of live viewing share.**



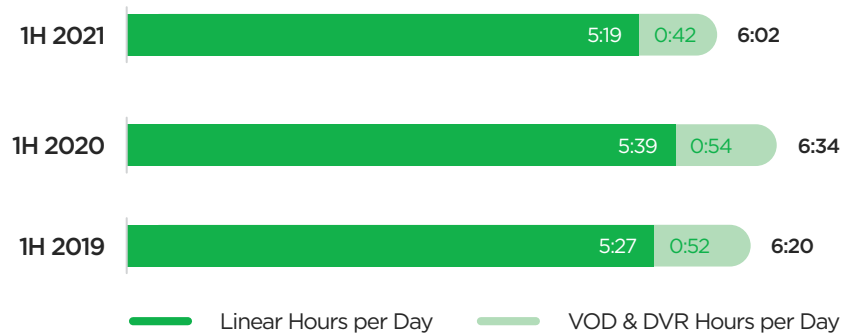
*Comcast Aggregate Household Viewership Data. Average daily time spent with live and time-shifted (DVR/VOD) viewing. Time period as indicated in chart.

**Comcast Aggregate Household Viewership Data. Shift in live share of total viewing. 1H 2019, 1H 2020, and 1H 2021.

YOY 1H TV VIEWING COMPARISON

According to our aggregated HH viewership data, 1H '21 saw the first year-over-year declines in time spent viewing since data recording began. These declines began in March 2021 and are likely due to comparisons with months in 2020 when stay-at-home orders were in place.

Live viewing share remains strong and continues to lead against time-shifted viewing according to our viewership data.



Comcast Aggregate Household Viewership Data. 1H 2019, 1H 2020, and 1H 2021. Comparison of average daily time with live and time-shifted (DVR/VOD) viewing.

15 Billion Measured Hours in 1H '21

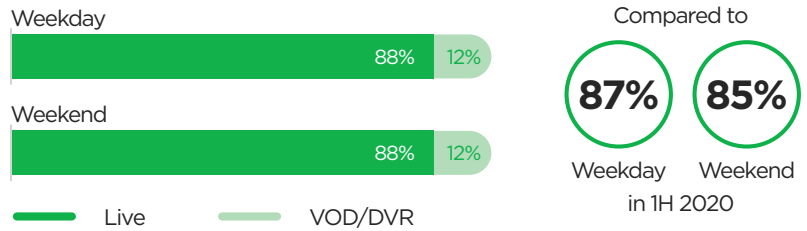


Comcast HHs consumed 15 billion hours of TV viewing in 1H '21.

Comcast Aggregate Household Viewership Data. Gross Hours measured across 1H 2021. Includes live, time-shifted, cable, broadcast, and DVR viewing. Average Household Figure represents deduplicated households.

LIVE VIEWING SHARE THROUGHOUT THE WEEK

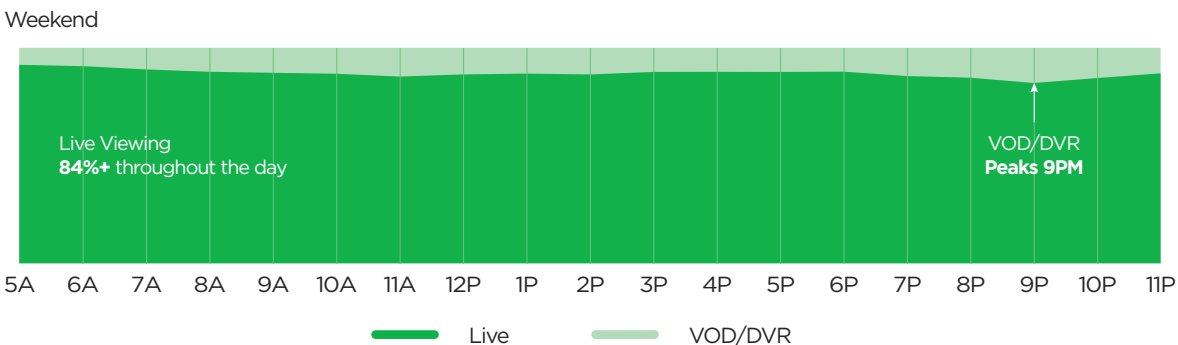
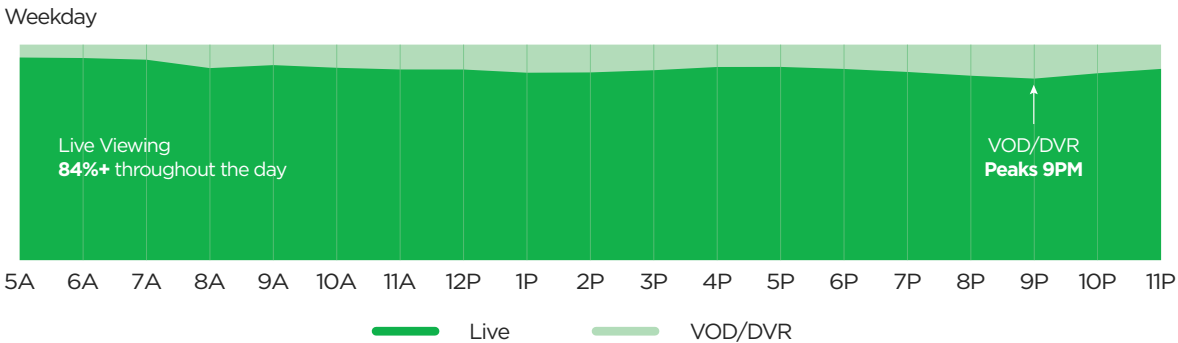
Every day of the week, 88% of all TV viewing happened live throughout the first half of 2021. This is up from the 87% of live weekday viewing and 85% of live weekend viewing during the same period last year.



Comcast Aggregate Household Viewership Data. Share of daily time spent with live vs time-shifted viewing. Time period as indicated above.

LIVE VIEWING SHARE REMAINS STRONG THROUGHOUT THE DAY

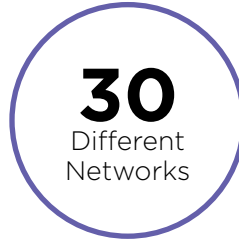
Looking into the hourly share between live and time-shifted viewing throughout 1H '21, weekday live viewing lost share in the early afternoon, and again around 9PM. Live TV viewing never fell below 84% of share, regardless of the time of day or day of the week. In the first half of '20, the floor of live share throughout the day was 81%.



Comcast Aggregate Household Viewership Data. Share of hourly time spent with Live vs Time-shifted Viewing. Q1/Q2 2021. Weekday: Mon-Fri. Weekend: Sat-Sun



DIVERSE VIEWING PATTERNS



Consumers continue to watch a diverse set of channels. HHs watched an average of **30 different networks** in 1H 2021.

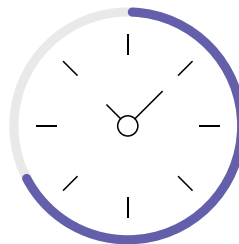
Comcast Aggregate Household Viewership Data. Average number of networks viewed per month during Q1 and Q2 2021.



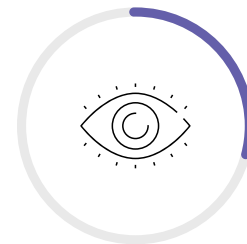
When looking at the networks with the most viewing per HH, there were **304 different “most-watched” networks** across Comcast HHs during 1H 2021.

Comcast Aggregate Household Viewership Data. 1H 2021. Number of most watched networks across 16m households. Minimum of 100 households in threshold.

ADDITIONAL FACTS



HHs watch throughout the day. **70%** of live viewing occurs outside of primetime.*



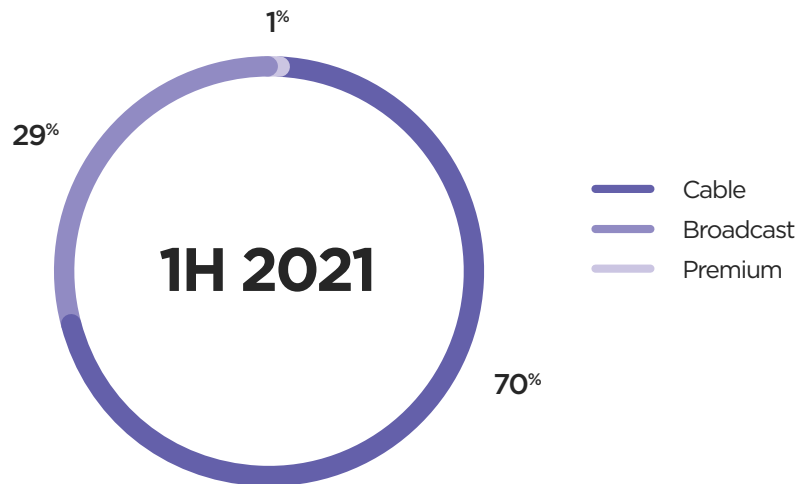
As all HHs watch differently, advertisers can't rely on the “most-watched” networks alone to achieve scale. The top 5 networks only accounted for **31%** of all viewing in 1H '21.**

*Comcast Aggregate Household Viewership Data. 1H 2021. Percentage of viewing occurring outside the house of 7p-11p. Average per quarter.

**Comcast Aggregate Household Viewership Data. Q1 and Q2 2021. Percentage that top 5 viewed networks made up in terms of share of total viewing per quarter.

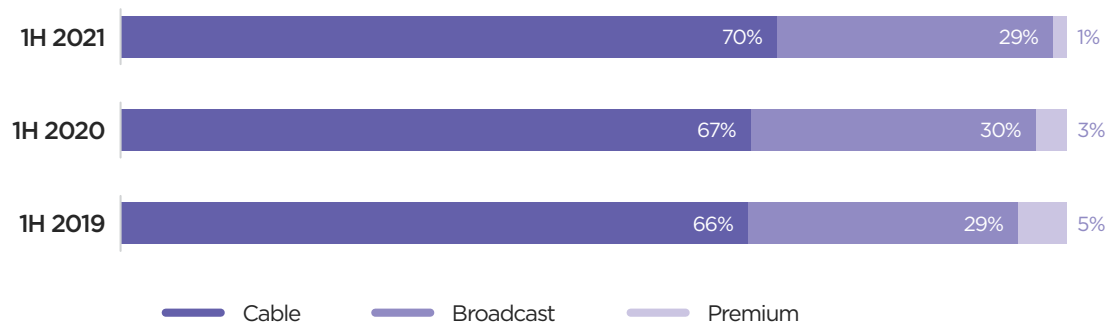
CABLE TV CROSSES 70% SHARE

In 1H '21, the share of viewing for cable networks was slightly higher. Up from a 67% share in 1H '20, cable viewing reached 70% share in 1H '21. Cable TV share reached 71% in 2Q '21.*



CABLE SHARE SHOWS GROWTH IN 1H 2021

The first half of 2021 is showing Cable share increases YoY.**



Cable

Traditional cable networks that do not fall into the premium cable, broadcast affiliate, independent or Spanish-language broadcast categories

Broadcast

“Big Four” networks (ABC, CBS, FOX, NBC) plus independent broadcast networks and Spanish-language broadcast

Premium

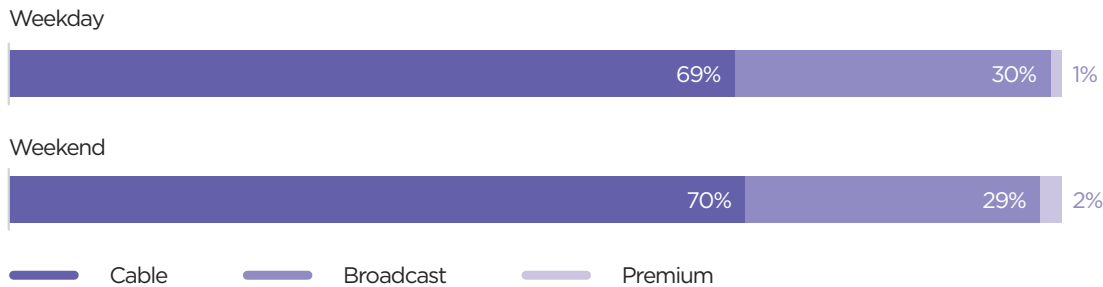
All premium non-ad supported cable networks (Cinemax, Epix, HBO, Showtime, Starz, etc.)

*Comcast Aggregate Household Viewership Data. Percentage share of viewing between Cable, Broadcast, and Premium network categories. Categories defined above. Time period as indicated.

**Comcast Aggregate Household Viewership Data. Trend of cable networks share of viewing. 2019-1H 2021.

1H '21 CABLE, BROADCAST & PREMIUM VIEWING SHARE: WEEKDAY VS. WEEKEND

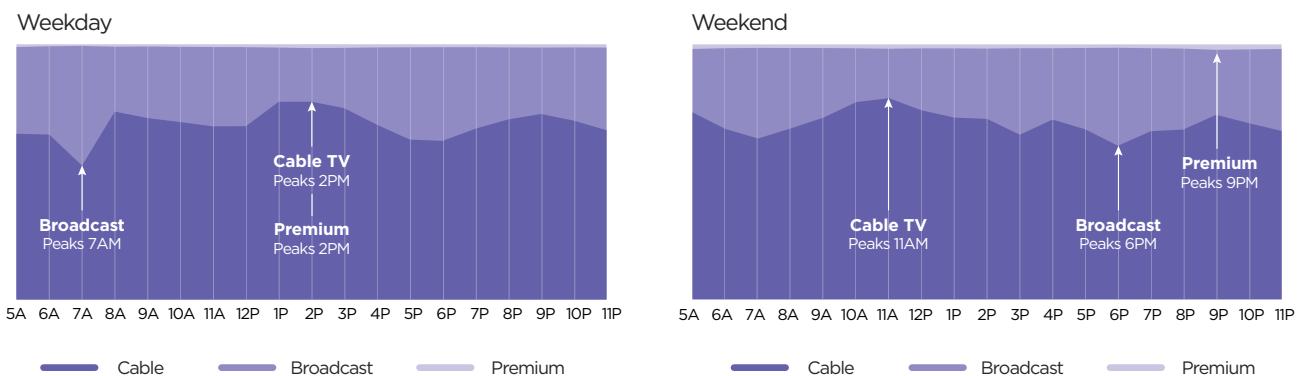
Looking at the hourly share shift for cable, broadcast, and premium networks during 1H '21, cable's share maintained a steady 69% average over the course of the weekday. On weekend days, cable share reached 70%, gaining one percentage point of share from broadcast networks.



Comcast aggregate household viewership data. Share of daily time spent by network type. 1H 2021. Cable defined as all cable networks. Broadcast defined as all broadcast networks, including independent and Spanish language. Premium defined as HBO, Showtime, Starz, Cinemax. Percentage numbers' sum may be over 100% due to rounding.

NETWORK SHARE SHIFTS: 1H '21

Below are the hourly shifts in share between cable TV, broadcast and premium networks for 1H '21. Cable share peaks at 2P on weekdays with 77% share and 11A on weekends with 79% share. Broadcast's share of viewing spiked to 38% on weekends at 6P and 47% on weekdays at 7A.



Comcast aggregate household viewership data. Hourly share of daily time spent by network type. 1H 2021. Cable defined as all cable networks. Broadcast defined as all broadcast networks, including independent and Spanish language. Premium defined as HBO/Showtime, Starz, Cinemax.

EFFECTV INSIGHTS

EVERYWHERE THE CONSUMER IS: HOW VIEWING EXTENDS ACROSS CONTENT AND DEVICES



HOW VIEWING EXTENDS ACROSS CONTENT AND DEVICES

Viewing habits continue to evolve as audiences gain choices about what, when and where they watch their favorite content. What constitutes TV viewing depends on the viewer, the device they have available and the content they are watching. The following analysis showcases these differences and is based on Effectv's campaign ad exposure data for both traditional TV and streaming content.



What Is Ad Exposure Data?

The result of combining aggregated viewership data with campaign data (such as when commercials aired) to determine how the campaign performed based on audience viewing metrics such as reach & frequency.



Traditional TV: How we identify watching premium content whether live (linear) or time-shifted by subscribing to a pay cable TV service.

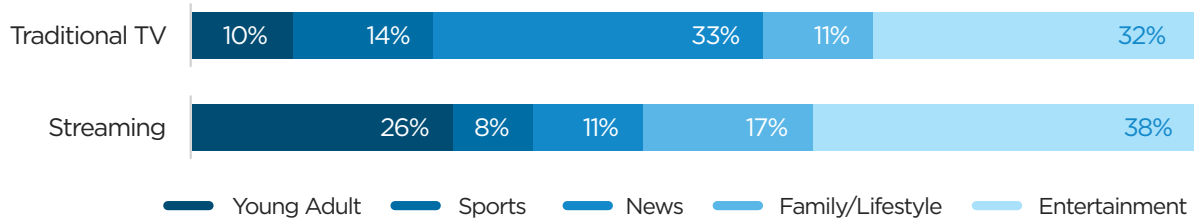
Streaming: Generally identified as watching content via a connected TV, a mobile device and/or a web browser. This analysis includes impressions from streaming campaigns delivered by Effectv, which also includes set-top-box VOD.



1 Viewing by Content

Content from national network brands such as Discovery, ESPN, and HGTV is consumed differently across traditional TV and streaming platforms. The following chart reveals the differences by genre when comparing traditional TV viewing with streaming.

Impressions Delivered by Content Genre



Additional Insights

Viewers were **+214% more likely to watch news** on traditional TV (33% of TV impressions compared with 11% of streaming impressions)

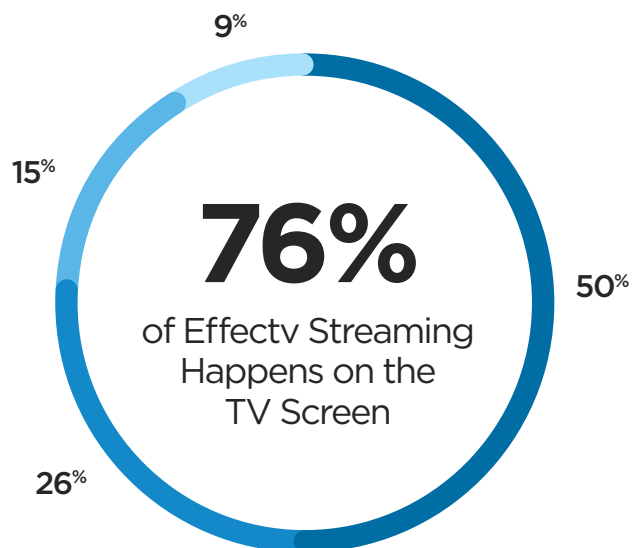
Viewers were **+73% more likely to watch sports** on traditional TV (14% of TV impressions compared with 8% of streaming impressions)

Viewers were **+153% more likely to watch young adult content** via streaming (26% of streaming impressions compared with 10% of traditional TV impressions)

Viewers were **+59% more likely to watch family/lifestyle content** via streaming (17% of streaming impressions compared with 11% of traditional TV impressions)

2 Viewing by Device

To watch their favorite content, viewers can choose from a large and growing number of devices. However, Effectv Streaming campaign data shows most premium content viewing still occurs on the “big screen.”



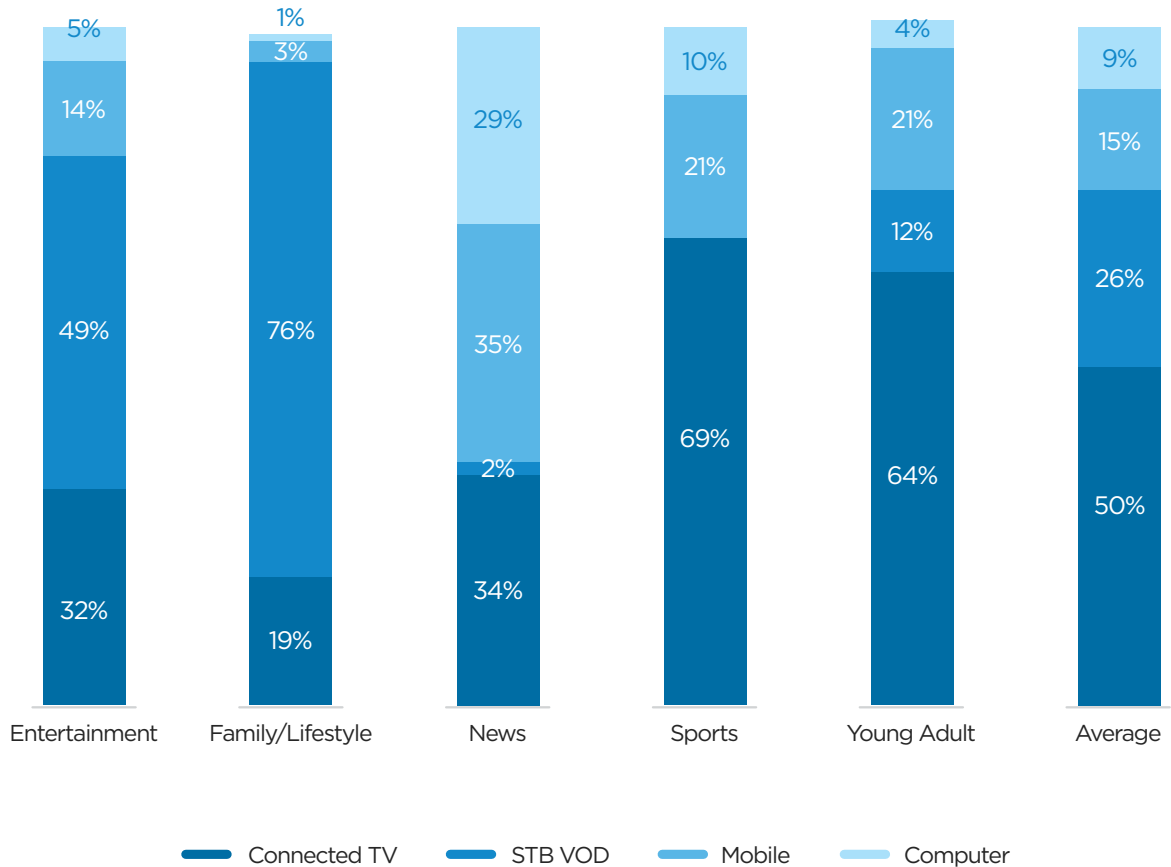
Source: Comcast Internal Analysis of Effectv Streaming campaigns (January through June 2021).

Connected TV STB VOD
Mobile Computer

3 Viewing by Content & Device

While 76% of streaming activity happens on the TV screen, this varies depending on the content. For instance, 95% of family/lifestyle streaming content is viewed on the TV screen while news is streamed across TV, mobile and computers relatively evenly.

Impressions Delivered by Device



Source: Comcast Internal Analysis of Effectv Streaming campaigns (January through June 2021).

When viewers watch news via streaming, the majority happens outside of the TV screen with 35% via mobile and 29% via a computer. Sports and young adult content have the next highest composition of streaming viewing via a mobile device at 21% each.

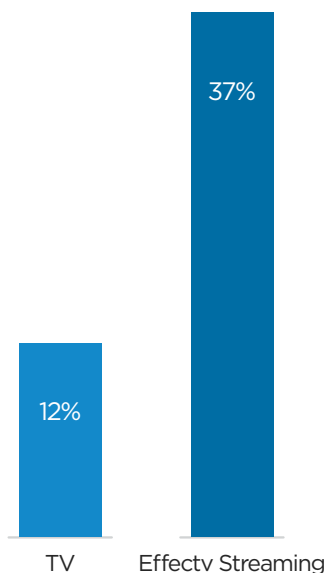
4 Streaming Delivers “Cord Cutters” & Light TV Viewing HHs

Traditional TV viewing continues to be a focal point for most HHs, as evidenced by the 5+ hours spent watching live TV daily. However, viewing habits have evolved across platforms, devices and media.

We looked at more than 20,000 Effectv advertising campaigns in 1H '21 that included both traditional TV and streaming. We found that streaming serves as a strong complement to any traditional TV campaign. **In fact, more than half (57%) of Effectv Streaming reach was incremental.**

This analysis consists of aggregated ad exposure data of viewing by Comcast HHs. “No-TV HHs” are defined as those with no TV viewing from January through June 2021. In addition, Comcast HHs with a pay TV service that represented the bottom 1/3 of TV viewing were defined as “light TV viewing HHs.”

Impressions Delivered to Light or No TV Viewing Households



Additional Insights

Streaming impressions were **+209% more likely** to be seen within light or no TV viewing HHs

Conversely, **37% of the impressions** for the streaming portion of the campaigns went to light to no TV viewing HHs. Nearly half (18% of 37%) of them were to HHs without a TV service

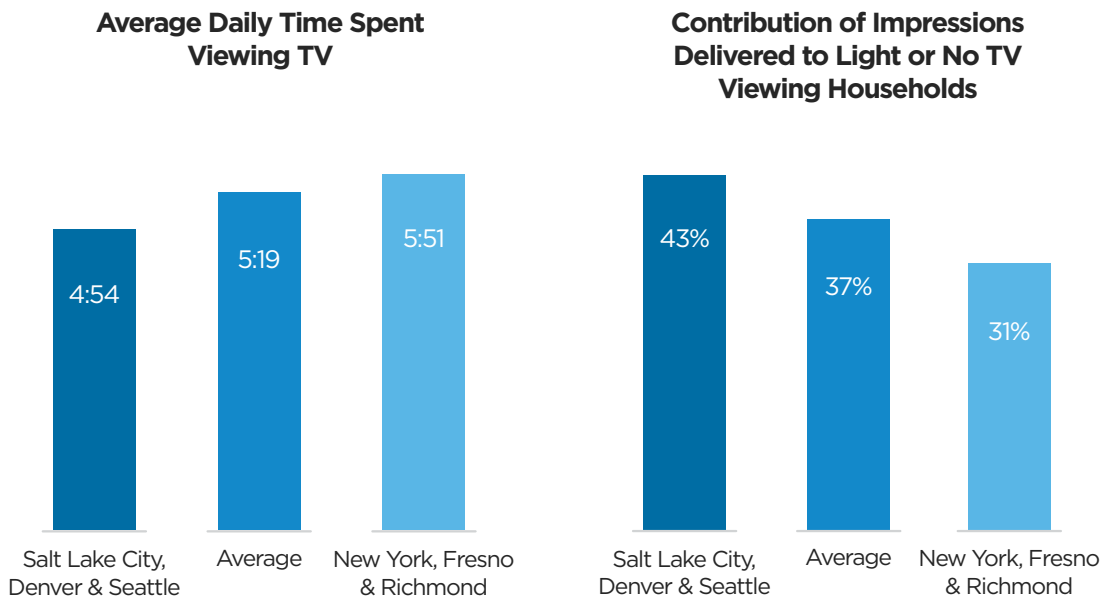
On average, **12% of TV impressions** were to light TV viewing HHs

What this means for advertisers: complementing your traditional TV campaign with premium long-form streaming is a great way to grow maximize reach and increase exposure with HHs less likely to be tuning in the traditional way.

Source: Comcast Internal Analysis of Effectv Streaming campaigns (January through June 2021).

5 Viewing Differs By Market

The previous section demonstrated that HHs are watching their content in different ways and it takes a cross-platform approach to reach them. But viewing can also vary by market. The following charts show market-specific variations in the daily TV viewing time spent, and the contribution of streaming impressions to HHs with light or no TV viewing.



Source: Comcast Internal Analysis of Effectv Streaming campaigns (January through June 2021).

Additional Insights

A higher percentage of streaming impressions (43%) go to light- or no-TV viewing HHs in markets such as Salt Lake City, Denver & Seattle where daily time watching TV is less

Conversely, a lower percentage of streaming impressions (31%) go to light- or no-TV viewing HHs in markets such as New York, Fresno & Richmond where daily time watching traditional TV is higher.

What this means for advertisers: HHs watch in different ways in different markets. Investment allocation decisions about traditional TV and streaming must weigh multiple factors including viewing habits, audience segments and geography.



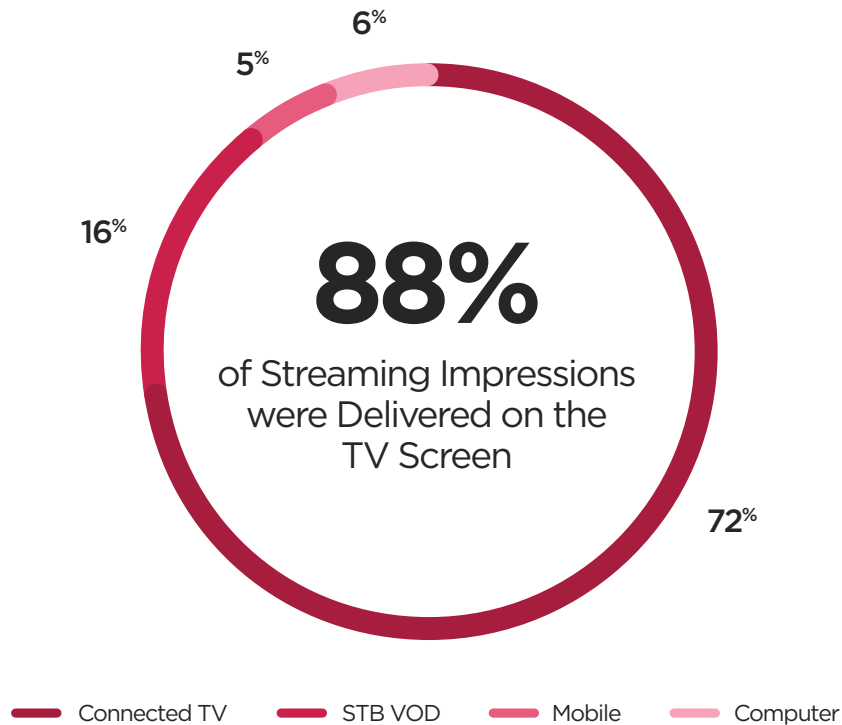
CASE STUDY

Cross-Platform Advertising Yields Results for Advertiser

The following case study highlights a community college focused on reaching its audience using a data-driven approach across both traditional TV and the Effectv Streaming advertising solution.

Advertiser: A Community College

Campaign Investment Allocation: 85% to traditional TV & 15% to streaming.



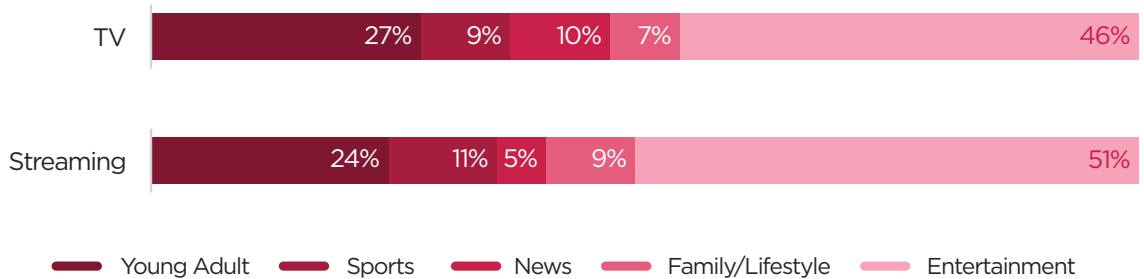
Source: Comcast Internal Analysis of Effectv Streaming campaigns (January through June 2021).

Viewing by Device & Content

88% of the streaming impressions were delivered via a TV screen to go along with the 100% of TV impressions. Whether it is in the traditional way or through a connected TV device, an overwhelming majority of HHs are still using the TV screen to watch their favorite premium long-form content.

CASE STUDY

Impressions Delivered by Content Genre

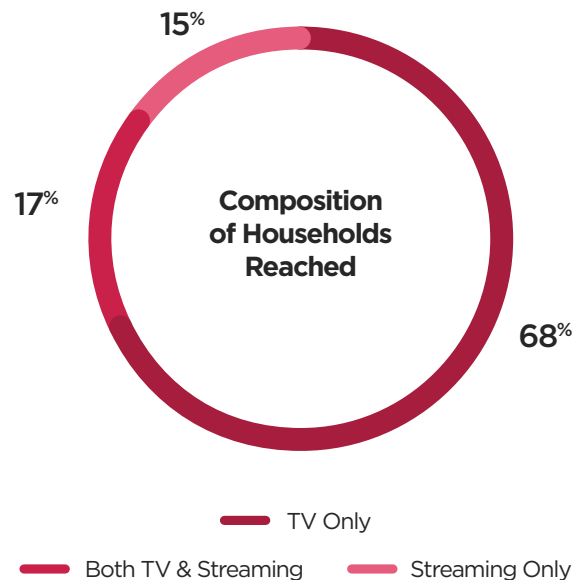


Source: Comcast Internal Analysis of a TV+Effectv Streaming campaign (January through June 2021).

This advertiser used a data-driven approach to identify the type of content they should advertise on, versus making specific content selections. As a result, the content viewed across platforms and devices remained relatively similar. Entertainment & young adult content made up the largest share of impressions for both traditional TV (73%) and streaming (75%).

Campaign Reach & Frequency

The composition of campaign reach consisted of 68% exclusively to traditional TV, 15% exclusively to streaming and 17% reached via both. TV continues to help advertisers reach a large audience in a short amount of time and it delivered the majority of reach in this campaign.



Source: Comcast Internal Analysis of a TV+Effectv Streaming campaign (January through June 2021).

CASE STUDY

Some may believe that because streaming has less reach, frequencies will be too large or too saturated. Conversely, some may worry that they cannot get an effective frequency with traditional TV due to its broad reach. That is not the case here as the frequencies across traditional TV and streaming were similar to one another, signifying that viewers were watching in similar ways across platforms.

Average Household Frequency is Consistent

Number of times the ad was seen on TV = 3.4

Number of times the ad was seen via Streaming = 3.8

Total number of times the ad was seen across TV and/or Streaming = 4.1

Campaign Delivery by Viewing Groups

Reach and frequency help us measure the overall performance of the campaign. For a more detailed view of the audience that were actually engaging in the content, it is important to analyze campaign results for the light / no TV viewing segment presented in the previous section.

Impressions Delivered to Light or No TV Viewing Households



Additional Insights

9% of the impressions delivered via traditional TV were to light TV viewing HHs

42% of the impressions delivered via Streaming were to light / no TV viewing HHs with a majority (29% of 42%) going to no TV HHs

Streaming impressions were **+375% more likely** to go to light / no TV viewing HHs

What this means for advertisers: the addition of streaming helped the advertiser get their message out to a wider audience.

Source: Comcast Internal Analysis of a TV+Effectv Streaming campaign (January through June 2021).

CONCLUSION

The changes to audiences and the industry wrought by the events of the past year and beyond make clear the evolution of media and content consumption will continue. From a global pandemic that resulted in less premium content being produced by studios, to societal challenges and impacts weighing on the minds of audiences, advertisers are challenged to be everywhere their consumers are.

These days, audience attention stretches across screens and they gravitate to the screens that make it easier to consume the content they crave. They know they have choice and can watch what they want, where and how they want to watch it.

- As viewers consume premium, long-form content, where they watch it continues to evolve
- Types of content and genre may vary depending on the device
- A large majority of streaming consumption occurs on a TV screen
- Streaming can reach viewers that traditional TV does not

For these reasons, advertisers are succeeding when they use TV to reach a large portion of the population and complement TV with streaming to enhance delivery among hard-to-reach viewers.

Notes & Sourcing

Notes: This analysis consisted of aggregated ad exposure data of viewing by Comcast households. "No TV households" are defined as Comcast households with no traditional TV viewing from January through June 2021. In addition, Comcast households with a pay TV service that represented the bottom 1/3 of TV viewing were defined as "Light TV viewing households".

Source: Based on analysis of 20,000 TV plus Effectv Streaming advertising campaigns that ran between January and June of 2021.

AUTHOR BIOS



HEATHER COGHILL

Heather is senior director of audience insights for Effectv. In her role, she builds narratives around Comcast's internal viewing data to educate internal and external stakeholders on marketplace trends. Heather has 15 years of experience, overseeing strategic research on broad and specific audience segments, including Gen Z, Millennials, Women and Multicultural audiences.



TRAVIS FLOOD

Travis is the director of customer insights at Effectv. In this role, he uncovers new data insights to help advertisers better understand and implement audience-based buying strategies. Travis combines his passion for learning, an innovative spirit and 20+ years of advertising experience to deliver actionable guidance to customers.



ANNIE HAGERTY

Annie is a senior insights analyst at Effectv. In her role, she leverages her passion for data and creativity by analyzing data to construct powerful stories that speak to the evolving video landscape. Annie's work empowers both internal and external stakeholders by allowing them to understand their consumers and confidently make data-driven decisions.



LEE SINGLETARY

Lee is the senior manager of brand and industry relations at Comcast Advertising. In this role, he manages client councils in America including the Agency Leadership Council, Effectv Automotive Advisory Council and the FreeWheel Council for Premium Video. Lee also leads content strategy for the organization, advocating for industry evolution, and creating/distributing insights, perspectives, and new research.

