effectv

THE

[TV]

VIEWERSHIP
REPORT

MULTISCREEN AUDIENCE INSIGHTS FOR CAMPAIGN SUCCESS

2H 2021

About the Data

Insights and data increasingly fuel the way in which TV advertising is planned and bought. This report, which is published biannually, provides an ongoing benchmark to help marketers use TV's reach and precision to be more effective in delivering results than ever before.

The data set used for this report is comprehensive, independently aggregated viewership data collected from more than 29 million households, whose members watched more than 15 billion hours of TV. Data from more than 20,000 multiscreen campaigns garnering over 1.5 billion impressions is included in this report as well.

Contents

Introduction

Keeping pace with the modern video consumer

Welcome to a new iteration of The **TV Viewership Report** featuring second-half 2021 data and analysis. To keep pace with the video ecosystem's evolution and shifting viewership behaviors, the bi-annual report now serves as a state-of-viewership and campaign metric benchmarking document whereby advertisers can gain multiscreen insights to inform their campaign strategies.

On average, video consumers in Comcast households (HHs) are spending more than six hours watching traditional TV daily; however, their viewership habits and preferences are shifting to include more devices and services. This edition of The TV Viewership Report highlights aggregated Comcast first party viewing data and expands to include ad exposure data drawn from more than 20,000 Effectv advertiser campaigns across both linear TV and streaming. The change in approach reflects the video consumer who is viewing content on their terms.

A holistic look at the data sources that represent video consumers' viewership behavior and the advertising they are served regardless of content or screen, reveals actionable insights and strategies advertisers can use to maximize campaign results today.
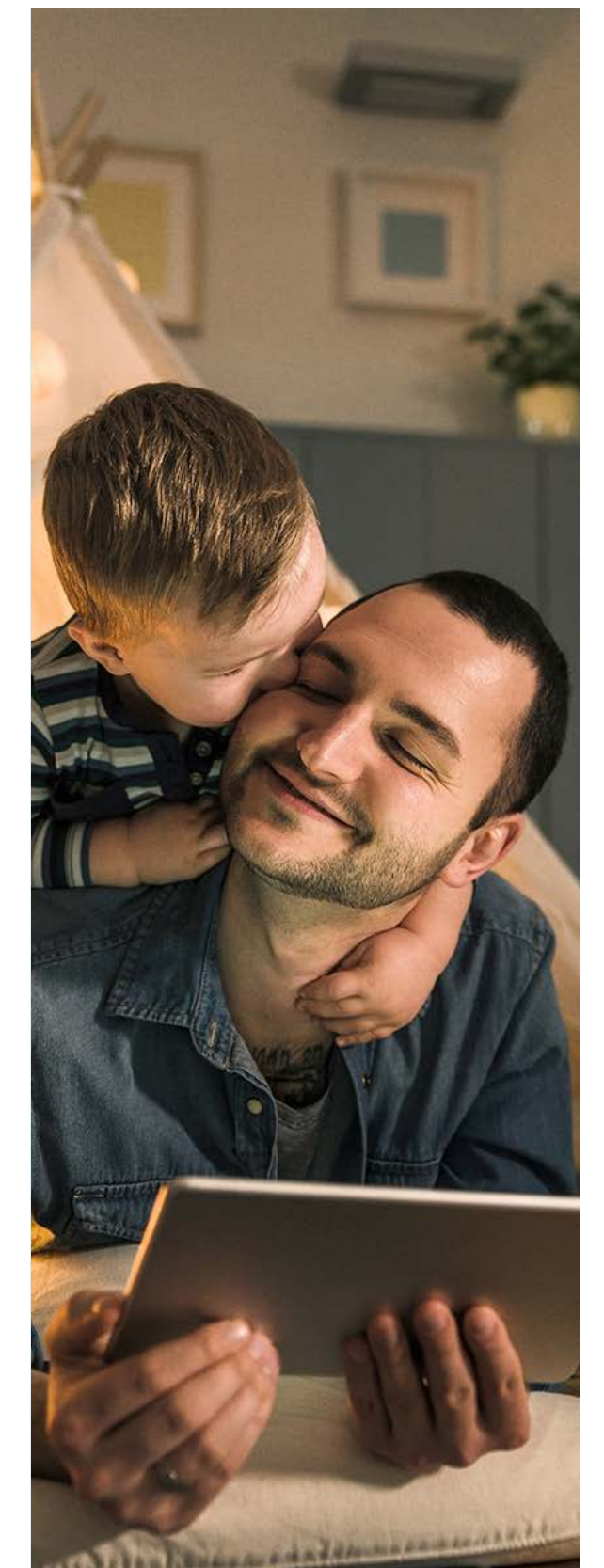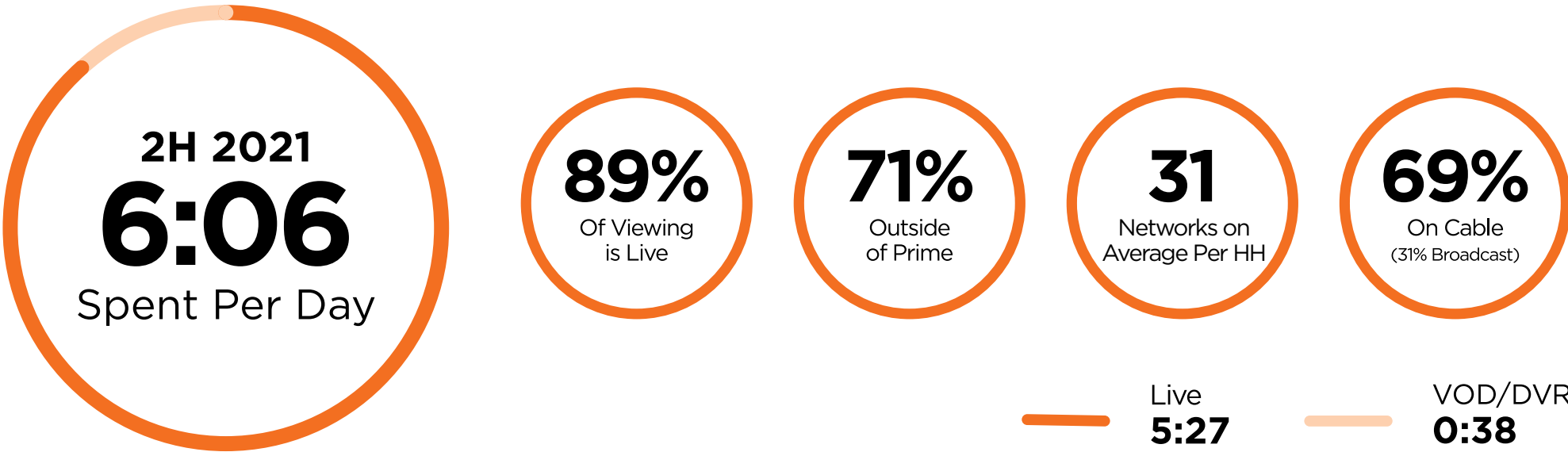
2H 2021 Key Findings

1. **The majority of streaming viewership happens on the big screen.** 78% of Effectv Streaming happens on the TV screen.

2. **Traditional TV is the foundation of multiscreen campaigns.** 82% of multiscreen campaign reach comes from traditional TV.

3. **Streaming provides incremental reach.** 51% of HHs reached through streaming were incremental to campaigns, overall.

4. **Sports programming enhances campaigns.** 42% of HHs reached through sports programming were incremental to campaigns.

5. **Multiscreen benefits exist across audiences.** Multiscreen tactics work in similar ways across the audiences advertisers are trying to reach.

Source: Effectv Streaming is Effectv's advertising solution enabling advertisers to deliver their message to their target audiences within streaming TV and premium video content, wherever, whenever, and however they're watching. Effectv Streaming includes viewing from Xfinity on Demand.

Time Spent with Traditional TV & Streaming

Traditional TV Remains Strong

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2H 2021
6:06
Spent Per Day

89%
Of Viewing
is Live

71%
Outside
of Prime

31
Networks on
Average Per HH

69%
On Cable
(31% Broadcast)

—— Live
5:27

—— VOD/DVR
0:38

(!) **TV remains a vital part of any video advertising strategy. A data-driven approach follows the audience throughout the day across many networks.**

Source: Comcast Aggregate Viewership Data. Time period as indicted above.

Streaming is a Big Screen Viewing Experience

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78%
of streaming happens on the TV screen

Streaming consists of impressions viewed via:

- Connected TV
- Video on Demand (VOD) served via an Xfinity set-top box
- Mobile app or device
- Web browser

50% Connected TV
28% Xfinity set-top box
13% Mobile
9% Web browser
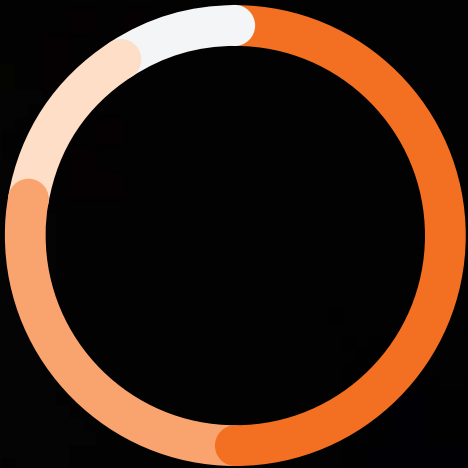
(!) **The communal experience of watching on a TV means streaming viewers are engaged and it's more likely that multiple people are watching.**
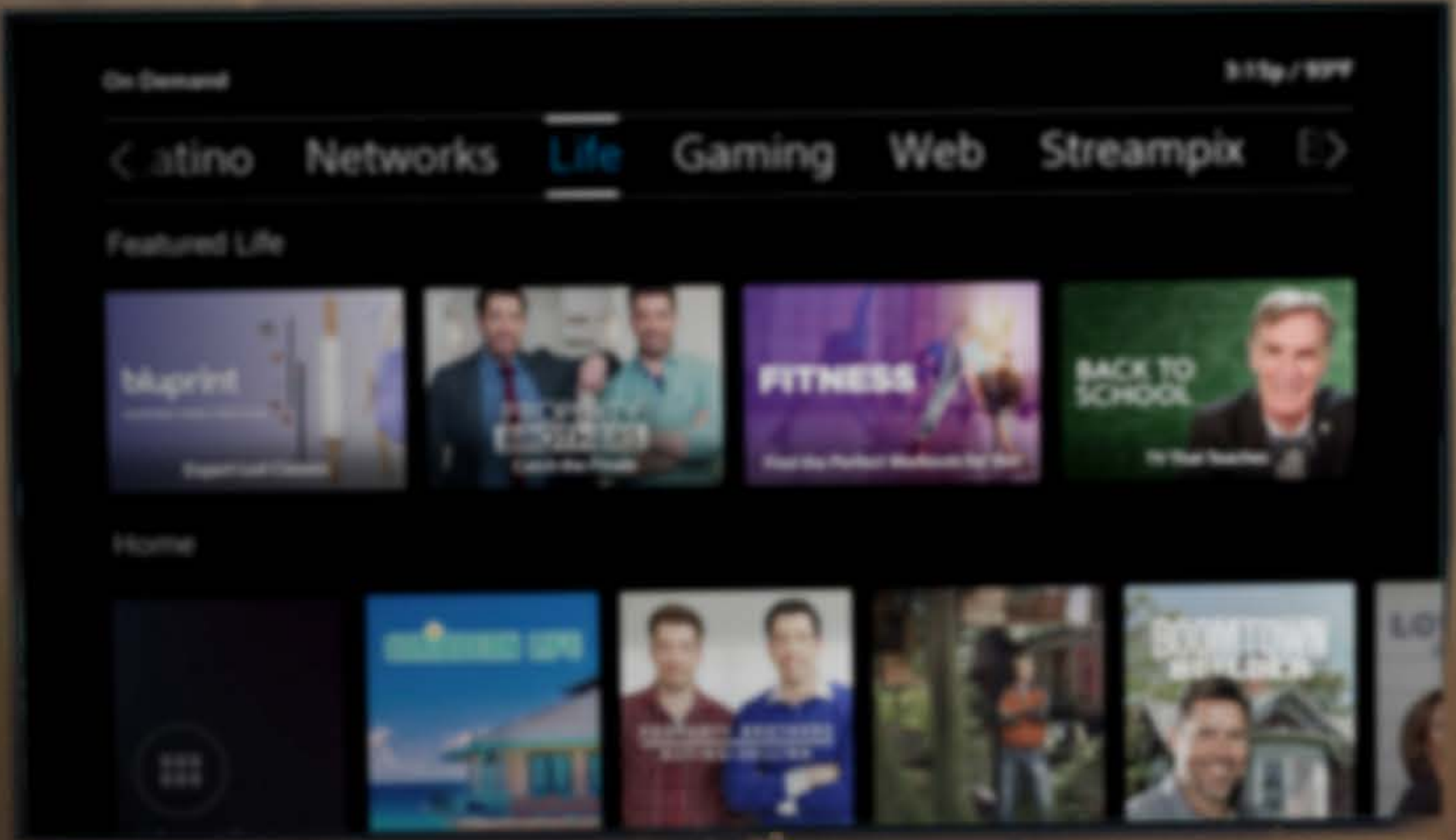
Source: Comcast Internal Analysis of Effectv Streaming campaigns (2H '21)

Multiscreen Campaign Reach Analysis

TV drives majority of multiscreen campaign reach

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82%	9%	9%

82%
of multiscreen campaign reach
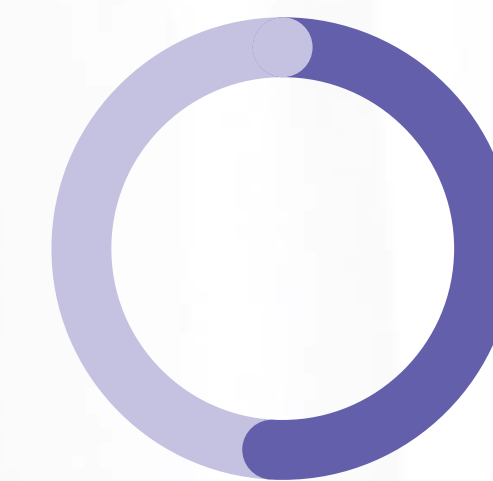is unique to traditional TV

— TV Only   — TV & Streaming   — Streaming Only

(!) **Advertisers that focus too much on streaming miss the scale that traditional TV provides.**

Source: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + Effectv Streaming campaigns (2H '21).

Streaming Provides Incremental Reach

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51%
of HHs reached by streaming were incremental to those reached by TV.

— Reached only by streaming   — Reached by streaming and TV

Note: of the HHs reached only through streaming or a combination of streaming plus traditional TV (18% as indicated on the previous page), 51% of streaming reach is incremental

(!) Streaming is instrumental to a video marketing strategy because it incrementally reaches audiences beyond traditional TV.

Source: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + Effectv Streaming campaigns (2H '21).

Sports programming enhances campaign delivery

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More From sports

42% of households reached by sports programming were incremental to the campaign[1]

Sports & Multiscreen Extend Campaign Reach

Breakdown of Campaign Reach for Multiscreen Campaign with Sports

Non-sports TV Only		Streaming Only
8%	65%	18%	9%
Sports Only		Duplication

⊙ **Sports programming delivers more impressions, which leads to more incremental reach. This means more exposure for your marketing message.**

Streaming enhances exposure to light - and no - TV viewers

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Streaming Impressions Were

3.4X more likely to be seen within light- or no-TV viewing HHs[2]

Impressions to "Light" or "No TV" Viewing HHs

TV Only
13%

Streaming
43%

Note: What are light-TV and no-TV viewing HHs? "No-TV" HHs are defined as those with no TV service or TV viewing from July through December, 2021. Comcast HHs with a pay TV service that spent, on average, less than about one hour per day viewing were defined as "light-TV" viewing HHs.

⊙ **HHs watching little or no TV are more prone to view advertising messages on streaming platforms.**

The addition of streaming builds campaign frequency

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Frequency Increased

+16% from 3.2 to 3.7 on average as a result of adding streaming to the traditional TV campaign[2]

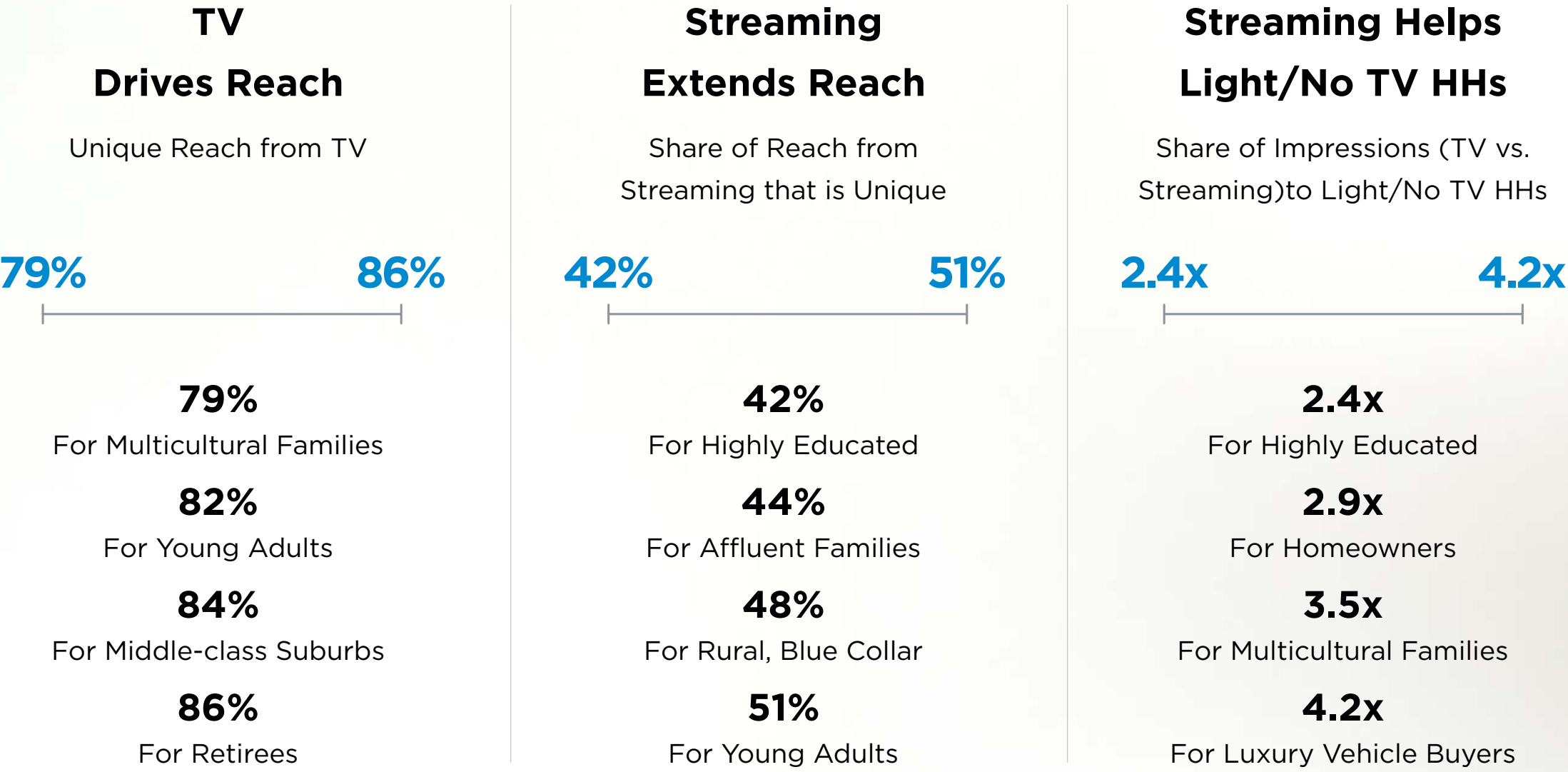**Average Frequency Before & After Adding Streaming**

TV Only
3.2

TV & Streaming
3.7

⊙ **Advertising messages are more likely to reach HHs at higher rates when streaming is included in the campaign.**

Multiscreen Benefits Exist Across Audiences

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TV Drives Reach	Streaming Extends Reach	Streaming Helps Light/No TV HHs
Unique Reach from TV	Share of Reach from Streaming that is Unique	Share of Impressions (TV vs. Streaming)to Light/No TV HHs
79% — **86%**	**42%** — **51%**	**2.4x** — **4.2x**
79% For Multicultural Families	**42%** For Highly Educated	**2.4x** For Highly Educated
82% For Young Adults	**44%** For Affluent Families	**2.9x** For Homeowners
84% For Middle-class Suburbs	**48%** For Rural, Blue Collar	**3.5x** For Multicultural Families
86% For Retirees	**51%** For Young Adults	**4.2x** For Luxury Vehicle Buyers

(!) **Multiscreen tactics work in similar ways regardless of the audience you want to reach.**
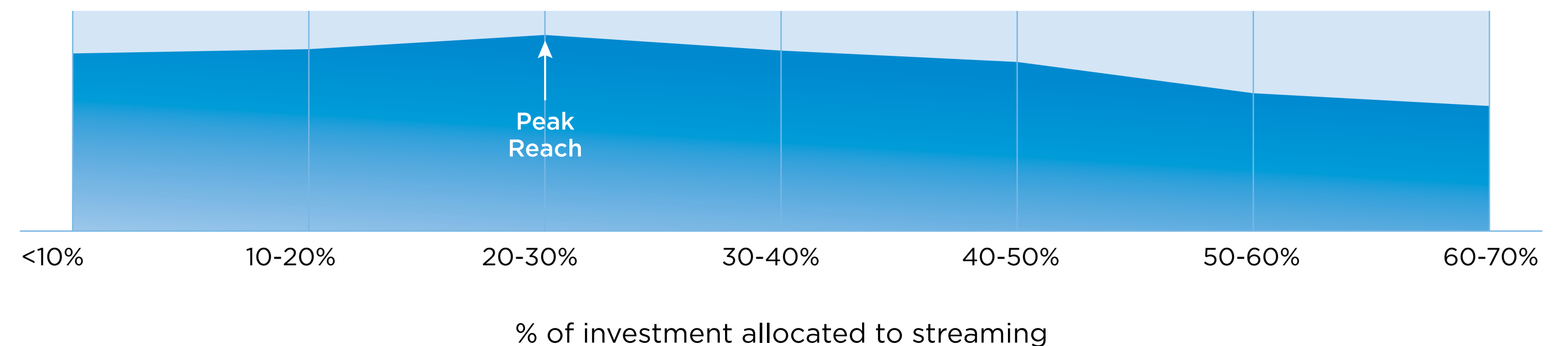
Source: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + Effectv Streaming campaigns (2H '21). Target as defined by Experian, Polk, &/or L2.

Recommendation

Multiscreen reach is dependent on investment allocation

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Peak
Reach

<10%   10-20%   20-30%   30-40%   40-50%   50-60%   60-70%

% of investment allocated to streaming

Reach was highest when

20-30% of investment was
allocated to streaming

Beyond 40%, the benefits from allocating more to streaming
were outweighed by the minimization of traditional TV.

(!) **While reach was highest when 20-30% of investment was allocated to streaming, advertisers should
consider adjusting investment within 10-40% based on audience.**

Effectv, the advertising sales division of Comcast Cable, helps local, regional and national advertisers use the best of digital with the power of TV to grow their business. It provides multi-screen marketing solutions to make advertising campaigns more effective and easier to execute. Headquartered in New York with offices throughout the country, Effectv has a presence in 66 markets with nearly 35 million owned and represented subscribers.

For more information and insights, visit **www.effectv.com/insights**.

Authors

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.

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.