CONTENTS

Executive Summary 4
Introduction 7
Time Spent with TV 8
How Viewers View 14
Effectv Insights: The Rise of Live 19
Summary 24
Contributors 25
THE CURRENT STATE OF TV VIEWING ACROSS THE COMCAST FOOTPRINT

In this edition of The TV Viewership Report, we explore viewership trends for the second half of 2020 (2H ’20), with some comparisons to the same time period in the previous year.

As with the previous Q2 special edition report, TV viewership remained high, particularly with cable and live TV. The impacts of our “new normal” have shaped viewership patterns and behaviors overall, however the recorded shift toward live TV is significant—especially when you consider the stop, starts and re-starts of live and tentpole events last year.

Pent up anticipation for live sports and entertainment, as well as the need for up-to-date news and information during a historic election cycle and evolving global health crisis, can be attributed to fueling the increase in live cable TV viewing.
2H 2020 KEY FINDINGS

01 Cable TV viewing saw its highest share of time spent in Q3 ’20, with 71% of all time being spent with cable.

02 Comcast households (HHs) saw a shift toward live TV in 2H ’20, accounting for 89% of daily viewership. There was a 16-minute year-over-year (YoY) increase in live viewing for Q3, and a 10-minute YoY increase in Q4.

03 Over the last three full years of viewing data, time spent with cable networks and live viewing has been up or flat YoY every quarter.

04 Cable TV news drove a large percentage of the increase in time spent with live TV in 2H ’20 at 25%, up from just 16% the same time the previous year.
INTRODUCTION

TIME SPENT WITH CABLE & LIVE TV UP AS VIEWERS WATCH ENTERTAINMENT PROGRAMMING & NEWS

In 2020, Cable TV saw its highest share of time spent—compared to previous quarters of recorded data—with 71% of time spent being with cable versus broadcast and premium networks in Q3.

While viewership patterns and behaviors are changing for a myriad of reasons, the recorded shift toward live cable TV viewing during the second half of the year is significant.

A recorded sixteen-minute increase YoY in live TV viewing for Q3 ‘20 and a ten-minute increase in Q4 show a trend in audiences spending more time with live content over other viewing experiences.

Cable news drove a large proportion of the live tune-in increase, however there are other network genres like sports, entertainment, and lifestyle driving live TV growth as well. While cable news kept viewers informed, entertainment served as a welcome respite for audiences: entertainment made up 38% of live viewing share and cable news accounted for 25% in 2H ‘20.

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 16.3 billion hours of viewing.

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

SHIFTS TOWARDS LIVE VIEWING

+16 MINUTE VIEWING SHIFT FOR LIVE TV IN Q3 & +10 MINUTE SHIFT IN Q4

In the second half of 2020 there was an increase of +16 minutes in viewing time per day in Q3 ’20 versus 2019 and an increase of 10+ minutes in Q4 ’20 versus 2019. Live TV viewing accounted for 89% of daily viewing time, with VOD/DVR accounting for 11% across Comcast HHs for 2H ’20. In Q3 ’20 there was an average of 6 hours and 18 minutes of time spent with TV per day and in Q4 ’20 there was an average of 6 hours and 31 minutes.

Comcast Aggregate Household Viewership Data. Average daily time spent with live and time-shifted (DVR/VOD) viewing. Time period as indicated in chart.
LIVE VIEWING SHARE GROWS IN 2H ‘20

Looking at the full-year trend of live viewing share, Q1 and Q2 remained relatively stable, but Q3 and Q4 saw large spikes in growth versus the previous year.

YOY TV VIEWING BY QUARTER

2H ‘20 showed quarterly YoY increases with time spent per day for live TV viewing. The shift to live viewing YoY is a recurring theme in this edition of The TV Viewership Report.

Live viewing share is strengthening its lead against time-shifted viewing according to viewership data. There have been no recorded YoY decreases over the past three years of measured data.

16+ Billion Measured Hours in 2H ‘20, 34 Billion in Full Year (FY) 2020

Comcast HHs consumed 16.3 billion hours of TV viewing, which is an increase of nearly 154 million hours versus 2H ’19. Throughout all of 2020 however, Comcast HHs logged a total of 34 billion hours during the year, an increase of 454 million vs 2019.

Comcast Aggregate Household Viewership Data. Gross Hours measured across 2020. Includes live, time-shifted, cable, broadcast, and DVR viewing. Average Household Figure represents deduplicated households.
Regardless of day of week, 89% of all TV viewing happened live throughout the second half of 2020. This is up from the 87% of live viewing that occurred weekday/weekend 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.

Looking into the hourly share between live and time-shifted viewing throughout Q3 and Q4 ‘20, weekday live viewing loses share as the morning progresses, and regains share through the afternoon hours. Interestingly, live TV viewing never falls below 85% 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%.

VIDEO ON DEMAND CONTENT CONTINUES GROWTH

While time spent with VOD decreased slightly during 2H ‘20 (a decrease of 3 minutes in Q3 and 6 minutes in Q4 ‘20), the majority of Comcast HHs (79%) watched VOD in 2H 2020. Moreover, there are more titles being watched than ever before: the average number of VOD titles watched monthly increased +10% YoY and +40% from just two years ago.

*VOD titles: TV shows and movies watched. Comcast Aggregate Household Viewership data. Time period includes total Q3/Q4 viewing, unless indicated otherwise.

**Number of VOD Titles Watched Per Month**

<table>
<thead>
<tr>
<th>Year</th>
<th>Titles Watched</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>116,000</td>
</tr>
<tr>
<td>2019</td>
<td>105,000</td>
</tr>
<tr>
<td>2018</td>
<td>82,800</td>
</tr>
<tr>
<td>2017</td>
<td>76,000</td>
</tr>
<tr>
<td>2016*</td>
<td>52,700</td>
</tr>
</tbody>
</table>

When looking at the networks with the most viewing per household, there were 311 different “most-watched” networks across Comcast HHs during 2H ‘20.

Choice and new ways to discover content means consumers continue to watch a diverse set of channels. HHs watched an average of 33 different networks in 2H ‘20.

Households watch different networks and view throughout the day. 71% of live viewing occurs outside of primetime.*

As all households watch differently, advertisers can’t rely on the “most-watched” networks alone to achieve scale. The top 5 networks accounted for 33% of all viewing in H2 ‘20.**

**Comcast Aggregate Household Viewership Data. Q2 2020. Percentage that top 5 viewed networks made up in terms of share of total viewing per quarter.
CABLE TV CROSSES 70% SHARE FOR FIRST TIME

In 2H ’20, the share of viewing for cable networks was slightly higher than normal. Cable viewing reached 71% share in Q3 ’20 for the first time in recorded data.*

CABLE SHARE SHOWS STRONG GROWTH IN 2H 2020

The yearly trend for cable TV’s share shows how it shifts overall in terms of seasonality, with 2020 share showing strong growth versus 2019 for each quarter.**

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

Cable TV viewing share remained strong over 2H ’20. Looking back at full year comparisons for 2019 and 2020, the share of time spent with cable networks has increased throughout every quarter of 2020.

2H 2020 CABLE, BROADCAST & PREMIUM VIEWING SHARE: WEEKDAY VS. WEEKEND

Looking at the hourly share shift for cable, broadcast, and premium networks during 2H ‘20, cable TV’s share maintained a steady 70% average over the course of the weekday, giving up a percentage point of share to premium and broadcast networks on the weekends.

NETWORK SHARE SHIFTS: 2H 2020

Below are the hourly shifts in share between cable TV, broadcast and premium networks respectively for the second half of 2020. Broadcast’s share of viewing spiked to 45% at 7AM on weekdays and live viewing made up 89% of all viewing. Morning viewing as a whole increased 20% YoY for 2H ’20, most likely due to a combination of world events as well as an increase of viewers remaining sheltered in place.

Comcast aggregate household viewership data. Share of daily time spent by network type. Q2 2020. Cable defined as all cable networks. Broadcast defined as all broadcast networks, including independent and Spanish language. Premium defined as HBO/Showtime, Starz, Cinemax.
DISSECTING 2H 2020 VIEWING
THE RISE OF LIVE

The postponements, starts and re-starts of sporting events, a historic and turbulent political season, social and racial unrest, an unprecedented global health crisis... the list goes on. The year 2020 was a wild ride for many reasons. As consumers were faced with stay-at-home orders, they relied on the latest news and craved escape in the form of new and exciting entertainment. Significant changes in viewership and behavior were to be expected.

However, the way in which audiences tuned in presented new trends in recorded data, which will provide the focus of a deeper analysis in this section of the report. The many key moments and macro factors during 2020 certainly contributed to the trends associated with various networks and select genres.

The increase in live cable TV viewing against the backdrop of increasing libraries of VOD content is certainly interesting. So, what do these shifts look like and how do they differ by programming genre?
CABLE NEWS DOMINATES VIEWING SHIFT

SHARE OF GROSS HOURS BY NETWORK GENRE, 2H ‘19 VS 2H ‘20

As household income levels increase, viewing shifts away from entertainment networks, and toward news and sports networks for cable. Also, share for broadcast programming (news and sports) declines as income increases.

GENRE DEEP-DIVE

DISSECTING 2H ‘20 VIEWING BY PROGRAMMING GENRE

Entertainment
42% → 38% Viewing Share

Although nearly 60% of scripted series experienced delayed production* as a result of the global health crisis, networks with programming related to reality television or scripted series still maintained the highest share of viewing. This slight shift in share offsets a stronger decrease in availability, with a -9% decrease in available programming in 2020.*

News
16% → 25% Viewing Share

With live viewing increases, it may be no surprise that the share of viewing for cable news networks increased as well. Compared to 2019, there was a +63% increase in gross hours measured for cable news networks. Cable news will likely continue to see viewing shifts when viewers look to their favorite networks and channels for updates on current events.

Sports
12% → 10% Viewing Share

The return of sports to the viewing ecosystem in Q2 ’20 created a large boost in viewership, however cable TV sports networks saw a dip in share of viewing overall for 2H ’20, largely driven by the postponements and delays in College Football, NFL, MLB, and Tennis.**

*Source: Deadline. “Coronavirus Shutdown Will Delay 60% Of U.S. & Global Drama As Scripted Hangover Set To Extend Well In 2021”


DISSECTING 2H ‘20 VIEWING BY NETWORK / PROGRAMMING

Lifestyle/Family
6%  →  7% Viewing Share

The share of cable networks related to travel, food, or family-themed programming saw a slight increase in 2H ‘20. As with entertainment networks, lifestyle networks saw -15% less available original programming YoY.* However, these networks did see an increase in total viewing, with a +9% lift in gross hours versus 2H ‘19.*

Young Adult
4%  →  3% Viewing Share

Cable networks airing programming aimed at young adults or animated cartoon viewers saw a slight decrease in overall share, likely driven by a -33% decrease in original programming for 2H ‘20 vs 2H ‘19.**

*Source: Nielsen. Change in available programming (based on duration) for cable lifestyle/family networks.

**Source: Nielsen. Change in available programming (based on duration) for young adult cable networks.
2H 2020 WRAP UP

As we’ve seen with recorded data and trends in viewership, 2020 television consumption was strong as viewers sought out and watched both news and entertainment content. A year defined by a unique set of circumstances contributed to viewership behavior that was different and more nuanced than in the past, highlighting the importance of meeting audiences where they are.

Cable TV saw its highest share of time spent at 71% vs. broadcast and premium networks in Q3 ‘20 and within that, a significant portion of the viewing was done live. Live cable TV drove daily viewership, accounting for 89% for 2H ‘20, showing viewers in Comcast HHs crave the most up-to-date, timely and relevant information and want to participate in “TV moments” when they’re happening. A further examined look at 2H ‘20 viewing showed that of all the live content available to watch, cable news and lifestyle/family networks lead the list of genre choices.

Data-driven approaches based on viewership trends and insights continue to help savvy marketers reach their audiences during moments that are at times unprecedented, uncertain and in motion with the world we live in.
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