

Q1 2020

— THE —  
[TV]  
VIEWERSHIP  
REPORT





# CONTENTS

Executive Summary	4
Introduction	7
Time Spent with TV	8
How TV Viewers View	14
Effectv Insights: Viewing Shifts in the Wake of the Pandemic	18
Summary	25
Contributors	26

# THE CURRENT STATE OF TV VIEWING ACROSS THE COMCAST FOOTPRINT

In this special edition of The TV Viewership Report, we explore viewership trends for Q1 2020 compared to the same period last year, with a special focus on the impact of social distancing measures put into place during the last two weeks of March.

As the world was forced to stay inside, people looked to their televisions and connected devices to stay informed and entertained at unprecedented levels to match this unprecedented time.

TV viewing time was at an all time-high within the Comcast household footprint, and even with sports and tentpole event programming canceled, live and daytime viewing grew significantly. Watching of on demand content also fueled this growth as consumers explored new and old titles alike.



# Q1 2020 KEY FINDINGS

- 01** TV viewing has reached new levels, with average daily viewing of 6 hours 41 minutes being the highest in nine quarters of recorded data
- 02** Households spent 17 more minutes with television daily compared to last year
- 03** Live viewing drove 88% of the year-over-year (YoY) growth for the quarter
- 04** 94% of markets across the country are showing year-over-year growth in viewing
- 05** Even with the loss of all key sports events, TV viewing was up +20% in late March compared to earlier in the month









# UNPRECEDENTED VIEWING IN AN UNPRECEDENTED TIME

The world came to a halt in mid-March.

Nearly everything that encompassed the routines of our daily lives, from work to leisure, changed. As a result, business owners, marketers and media industry experts are learning how to adapt to this rapid change in our environment. Some changes are temporary, others are shaping up to have a more long-term impact.

In the world of television, without sports and with changes and delays to high-profile programming, now more than ever, it's important to understand how viewers are consuming television.

The data in this report is aggregated from more than 17 million Comcast households (HHs) across 65 markets and is based on 8.5 billion hours of viewing.

When people are confined to their homes, TV becomes more important for consumers, but critical, for advertisers to reach engaged specific audiences at scale.

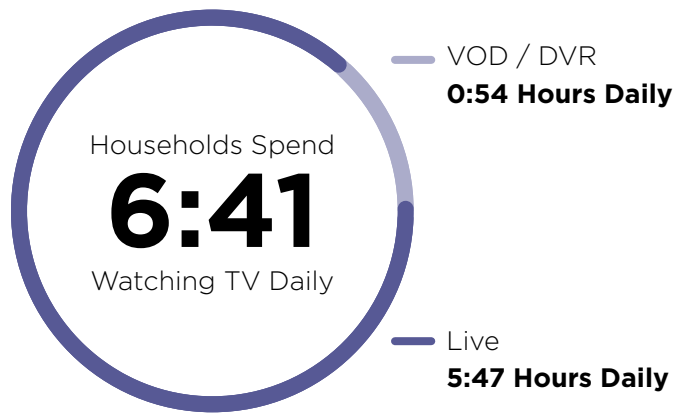
Insights and data increasingly fuel the way in which TV is planned and bought. **This report, which will be published on a bi-annual basis moving forward, will provide an ongoing benchmark to help marketers use TV's reach and precision to be more effective in delivering results than ever before.**

# TIME SPENT WITH TV IS THE HIGHEST SINCE Q4 2017

VIEWING +4% — 17 MIN —  
OVER LAST YEAR.

**Across 17M Comcast HHs, there was an average of 6 hours and 41 minutes of daily TV viewing,** which is the highest time spent with TV since this data was first collected in Q4 2017.

Compared to last year, total time spent is up by 17 minutes, from 6:24 in Q1 2019 to 6:41 in Q1 2020.



Live TV viewing accounted for 87% of all time spent, with (VOD/DVR) accounting for 13%

Comcast Aggregate Household Viewership Data. Q1 2020 average daily time spent with Live and Timeshifted (DVR/VOD) Viewing.



# TV VIEWING BY QUARTER, Q2 2018 - Q1 2020

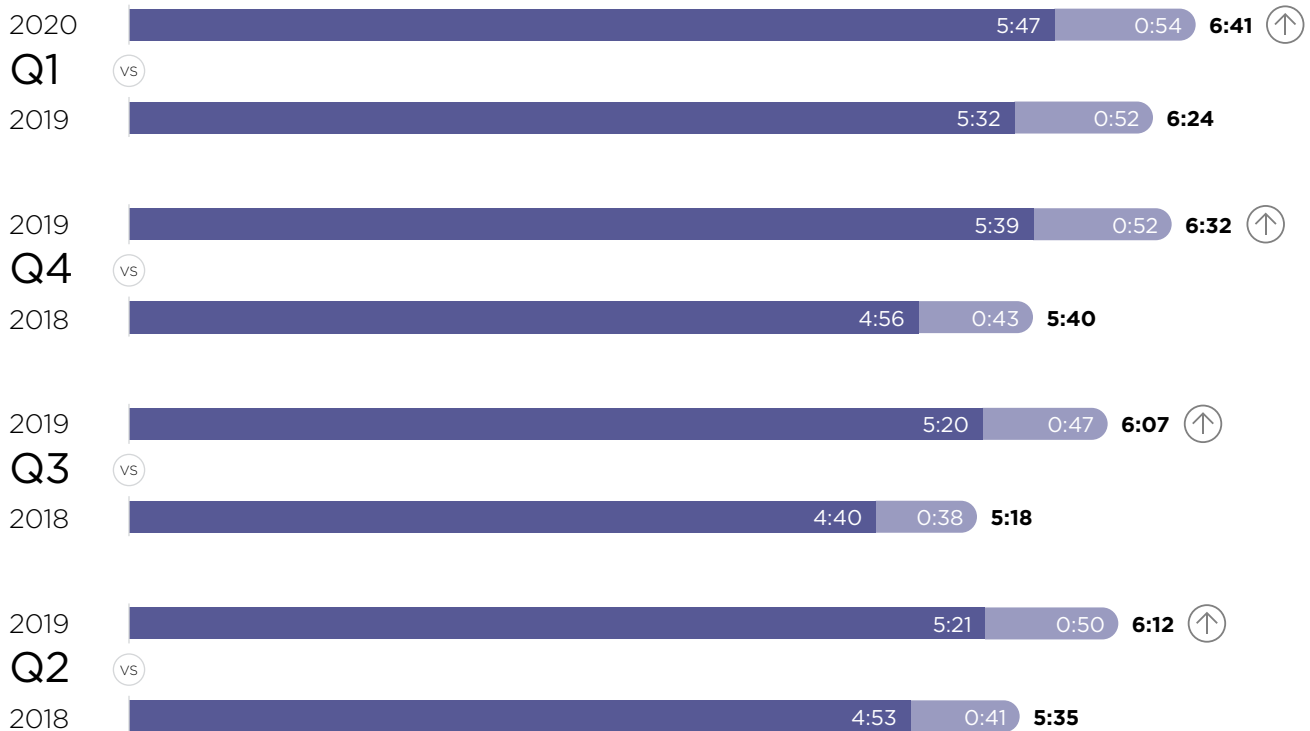
Comcast HHs' additional 17 minutes of TV time in Q1 2020 equates to a +4% increase YoY. While both live and time-shifted viewing (VOD/DVR) were up, 88% of the YoY growth can be attributed to live TV viewing.



LIVE VIEWING



VOD/DVR VIEWING



— Live Hours Per Day    — VOD & DVR Per Day

Comcast Aggregate Household Viewership Data. Q2 2018 - Q1 2020. Comparison of average daily time with live and time-shifted (VOD/DVR) viewing.



## Measured Hours in Q1 2020

Total hours consumed across the quarter was 8.5 billion hours (an increase of almost 100M hours YoY). Even in an evolved video landscape, Effectv continues to see growth in overall household TV viewing.

# DISSECTING Q1 GROWTH

Viewing is up over the same time last year, but what's driving the increase?

Overall, the jump of 17 minutes (6:24 to 6:41) can be attributed to a few factors:

- **VOD/DVR:** +2 minutes
- **Cable:** +13 minutes
- **Broadcast:** +7 minutes
- **Premium:** -5 minutes

Take a deeper dive →

2020 Q1  
**6:41**

**+4%** Increase in daily time spent with **VOD**

(0:27 in '20 vs 0:26 in '19)

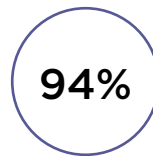
**+4%** Increase in daily time spent with **DVR**

(0:27 in '20 vs 0:26 in '19)

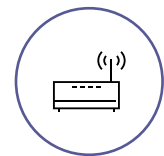
0:54

5:47

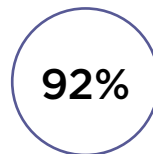
**The story is true across most markets with:**



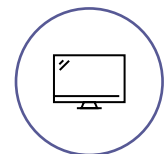
of markets showing an increase in total viewing



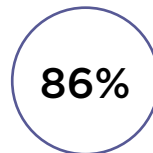
**+6%** increase in daily time spent with **Cable** networks  
(3:50 in '20 vs 3:37 in '19)



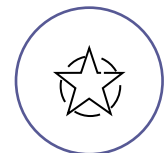
of markets showing an increase in live viewing



**+7%** increase in daily time spent with **Broadcast** stations  
(1:47 in '20 vs 1:40 in '19)



of markets showing an increase in time-shifted viewing



**-33%** decrease in daily time spent with **Premium** networks  
(0:10 in '20 vs. 0:15 in '19)

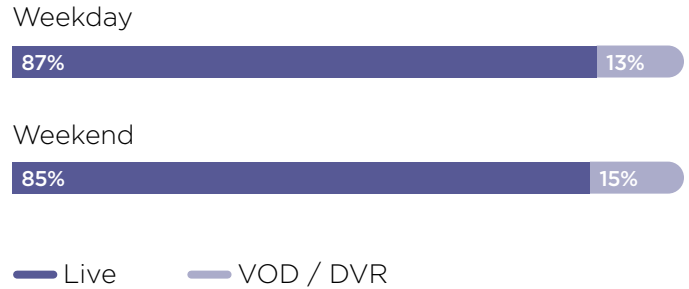
Comcast Aggregate Household Viewership Data. Q1 2020 average daily time spent with live and time-shifted (STB VOD/DVR) Viewing.

— Live Hours Per Day

— VOD & DVR Per Day

# TIME-SHIFTED VIEWING SHARE THROUGHOUT THE DAY: WEEKDAYS VS. WEEKENDS

86% of all viewing happens live. The share between live and time-shifted viewing tells a story of consistency: live maintains the majority of viewing across the 17M Comcast HHs, and has done so historically for as long as Comcast viewership data has been recorded.

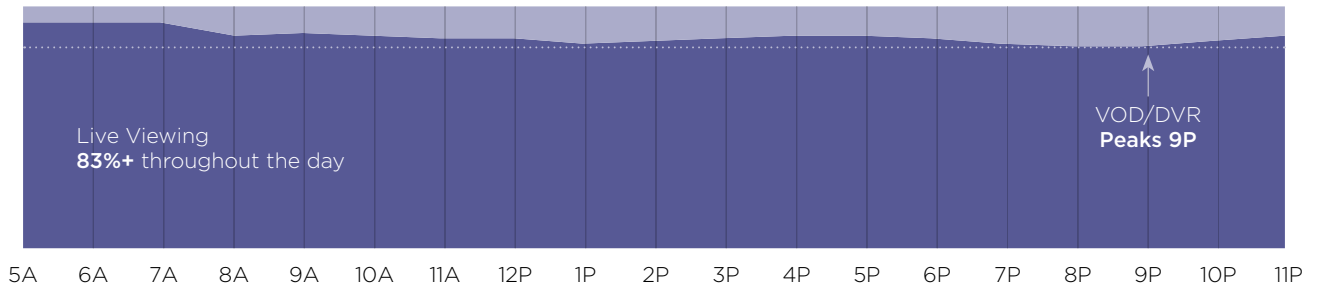


Comcast Aggregate Household Viewership Data. Share of daily time spent with live vs time-shifted Viewing. Q1 2020.

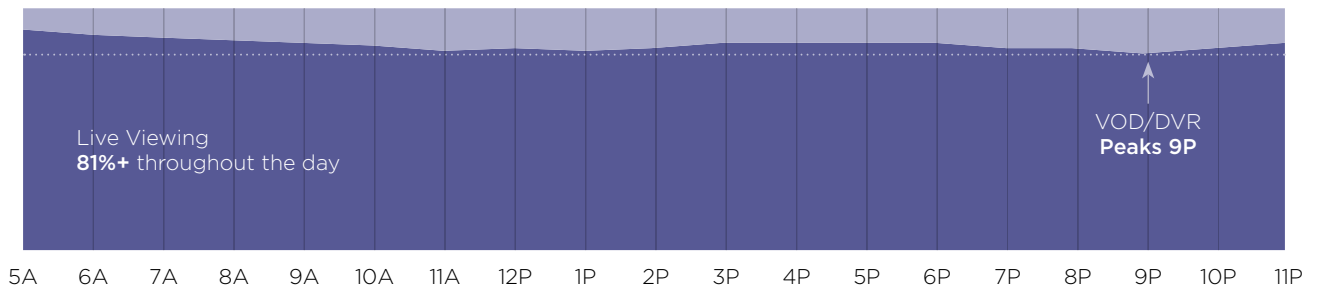
## TIME-SHIFTED SHARE ON WEEKDAYS VS. WEEKENDS

Taking a deeper dive into the hourly shift in share between live and time-shifted viewing throughout the day, live TV viewing accounts for the highest share in the overnight hours, but never falling below 81%. In Q1 2020, the largest share of time-shifted viewing was during weekends at 9pm when time-shifted accounted for 19% of all viewing.

### Weekday



### Weekend



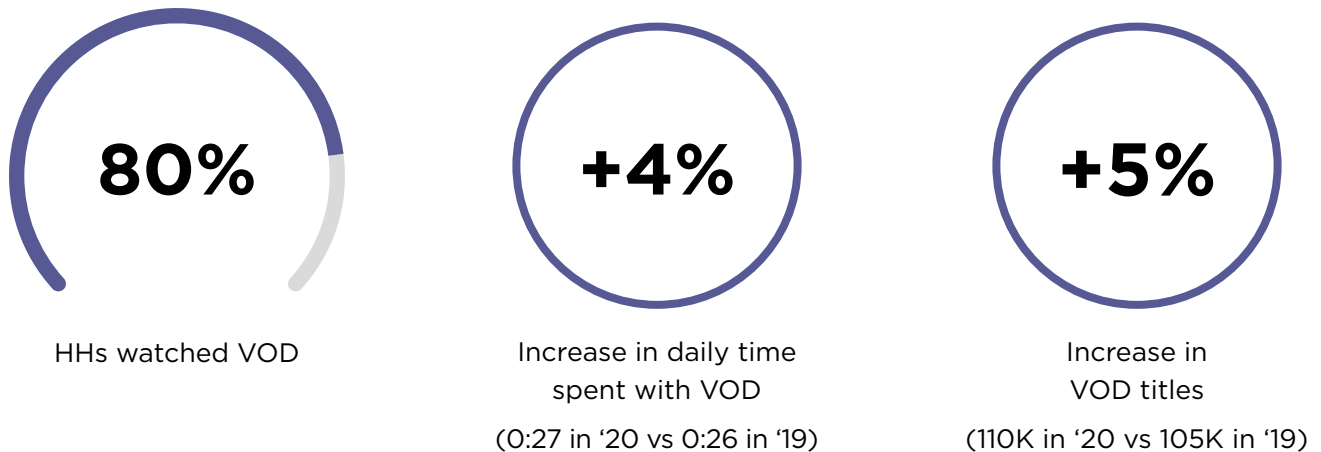
— Live — VOD / DVR

Comcast Aggregate Household Viewership Data. Share of hourly time spent with live vs time-shifted Viewing. Q1 2020. Weekday: Mon-Fri. Weekend: Sat-Sun.



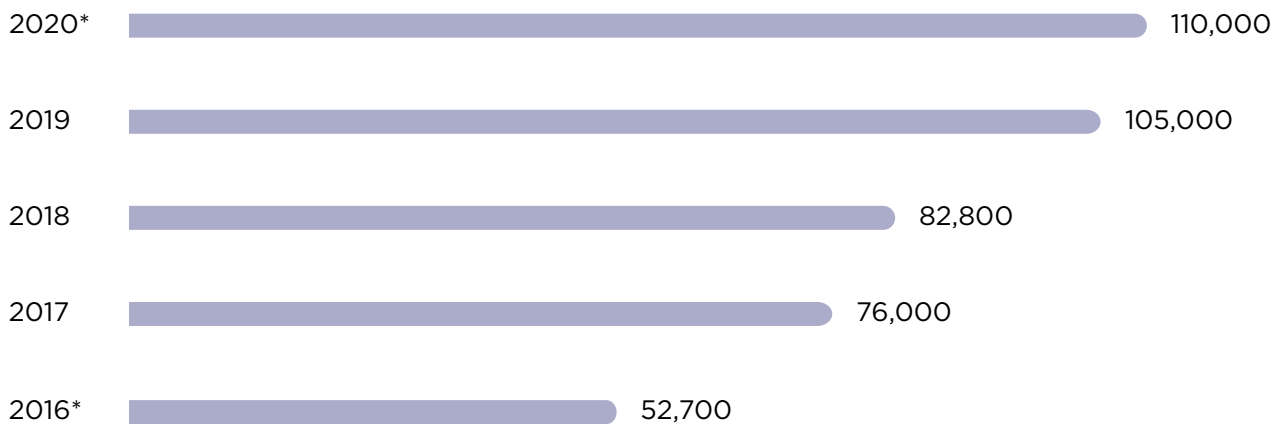
# VIDEO ON DEMAND SHOWS STRONG GROWTH AS A POWERFUL ADVERTISING OPPORTUNITY

In Q1 2020, **80%** of HHs watched VOD and more titles are being watched than ever before. VOD viewing was up +4% YoY. The increase in time spent was on par with the increase in VOD content. There were +5% more VOD titles watched in Q1 2020 compared to Q1 2019.



Comcast Aggregate Household Viewership data. Q1 2020 percentage of households that watched STB VOD.

## Number of VOD Titles Watched Per Month



Comcast Aggregate Household Viewership Data. Average STB VOD Titles watched Monthly.  
\*2016 based on Oct-Dec & 2020 based on Jan-Mar.



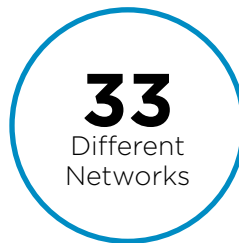


# DIVERSE VIEWING PATTERNS



When looking at the networks with the most viewing per household, there were **301 different “most-watched” networks** across Comcast HHs during Q1 2020.

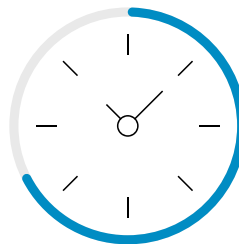
Comcast Aggregate Household Viewership Data. Q1 2020. Number of most watched networks across 17m households. Minimum of 100 households in threshold.



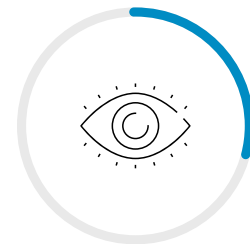
Choice and new ways to discover content means consumers continue to watch a diverse set of channels. Households watched an average of 33 different networks in Q1 2020.

Comcast Aggregate Household Viewership Data. Q1 2020. Average number of networks viewed per month during the quarter.

## ADDITIONAL FACTS



Households watch different networks and watch throughout the day. **68%** of live viewing occurs outside of primetime.\*



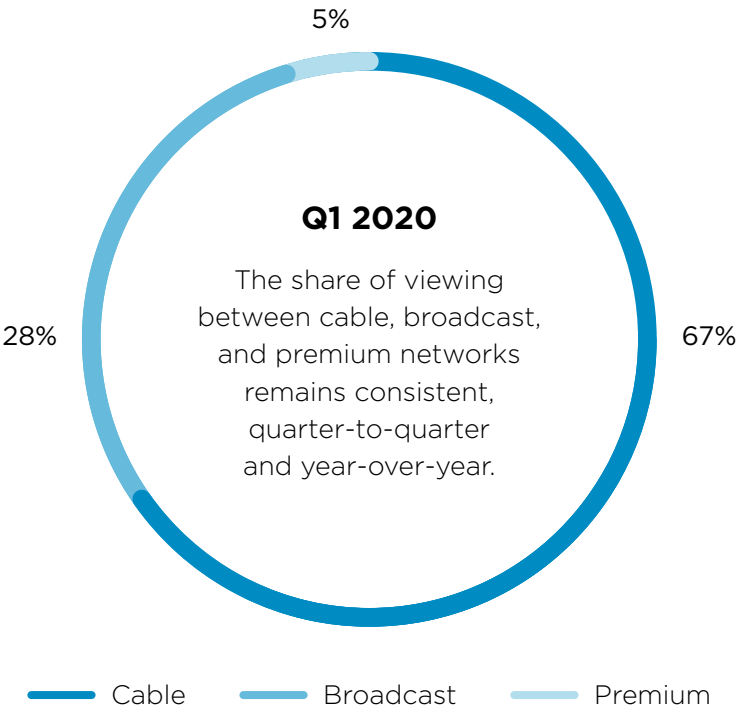

As all households watch differently, advertisers can't rely on the “most-watch” networks to achieve scale. The top 5 networks accounted for **29%** of all viewing in Q1 2020.\*\*

\*Comcast Aggregate Household Viewership Data. Q1 2020. Percentage of viewing occurring outside the house of 7p-11p.

\*\*Comcast Aggregate Household Viewership Data. Q1 2020. Percentage that top 5 viewed networks made up in terms of share of total viewing.



# MAJORITY OF TIME SPENT WITH CABLE NETWORKS

**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, FOX, CBS, NBC) plus independent broadcast networks and Spanish-language broadcast



**Premium**

All premium cable networks including HBO, Showtime, Starz, and Cinemax (non ad-supported)

Comcast Aggregate Household Viewership Data. Q1 2020. Percentage share of viewing between Cable, Broadcast, and Premium network categories. Categories defined above.

# VIEWING SHARE QUARTER BY QUARTER

Cable TV viewing made up 67% of viewing share in Q1 2020, up 2 percentage points over last year. Broadcast share has also seen a slight downtick since 2019, while premium networks remained flat.



■ Cable    
 ■ Broadcast    
 ■ Premium

Comcast Aggregate Household Viewership Data. Q2 2018 - Q1 2020. Shift in share of viewing between cable, broadcast, and premium networks. Categories defined above.

# CABLE, BROADCAST & PREMIUM VIEWING SHARE: WEEKDAY VS. WEEKEND

Evaluating share of viewing for weekday (Mon-Fri) versus weekend (Sat-Sun) showed a slight shift of share between cable and broadcast. Cable's share increased from 65% to 66% from weekday to weekend, while the broadcast share decreased from 31% to 29%.

## Weekday



## Weekend

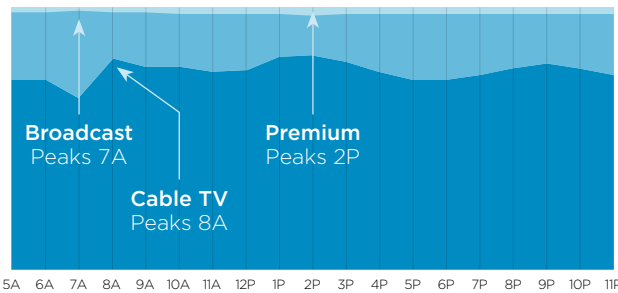


Comcast aggregate household viewership data. Share of daily time spent by network type. Q1 2020. Cable defined as all cable networks. Broadcast defined as "Big Four" networks (ABC, FOX, CBS, NBC) plus independent and Spanish language. Premium defined as HBO/Showtime, Starz, Cinemax.

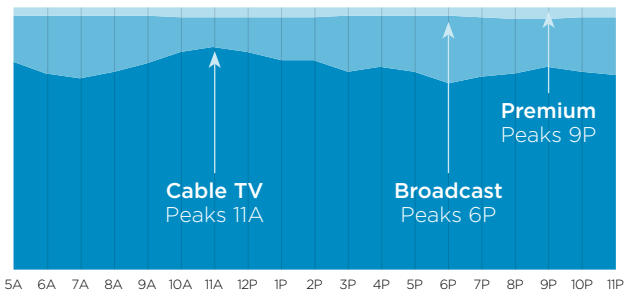
## Q1 NETWORK SHARE SHIFTS

The charts below show the hourly shift in share between cable TV, broadcast and premium networks respectively. The data shows strong fluctuations in share during early morning and early afternoon hours, with cable TV share peaking in morning, afternoon, and evening hours. Broadcast share peaked near news programming hours and premium network share remained consistent with a slight peak in the weekend overnight hours.

### Weekday



### Weekend



— Cable — Broadcast — Premium

Comcast viewership data. Hourly share of daily time spent by network type. Q2 2019. Cable defined as all cable networks. Broadcast defined as "Big Four" networks (ABC, FOX, CBS, NBC) plus independent and Spanish language. Premium defined as HBO/Showtime, Starz, Cinemax.



EFFECTV INSIGHTS

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# VIEWING SHIFTS IN THE WAKE OF THE PANDEMIC



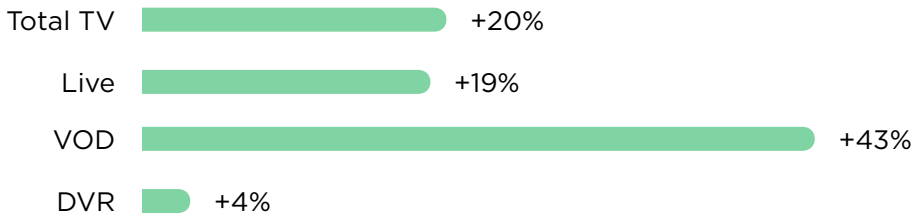
## CHANGES IN VIEWING AS A RESULT OF COVID-19

While viewership was up for the quarter in general, Covid-19 had a clearly acute impact on TV viewing in March. Although attention to the pandemic may have varied by market due to regional and state approaches to containment, this analysis focused on the viewing for the last two weeks of March (3/16-3/29) compared to the preceding two weeks (3/2-3/15). There were increases across platforms and time of day and it further reinforces the need to have an audience-based approach when seeking out these audiences.

# CHANGES IN VIEWING BY PLATFORM


Total time spent with TV was +20% for the second half of March (when compared to first half of March). Live TV was +19%, VOD was +43% while DVR viewing was +4%.

## Viewing Change by Platform

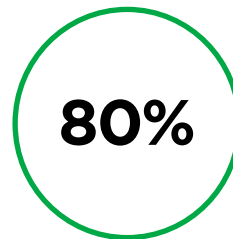
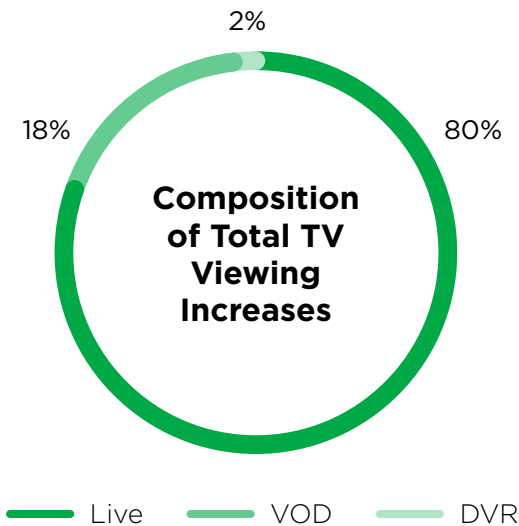


INCREASE IN TIME SPENT WITH TOTAL TV

Comcast Aggregate Household Viewership Data. March 2020. Viewing change by platform.

 Total TV time spent viewing increased +20% even as major live events were cancelled.

The composition of the additional time spent with television in late March: nearly 80% of the increase was a result of increased live TV viewing while 18% of the increase came from VOD and 2% came from DVR.



OF VIEWING INCREASE WAS FROM LIVE TV



**Audiences** are watching TV across multiple platforms

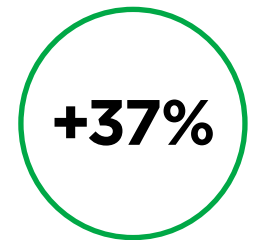
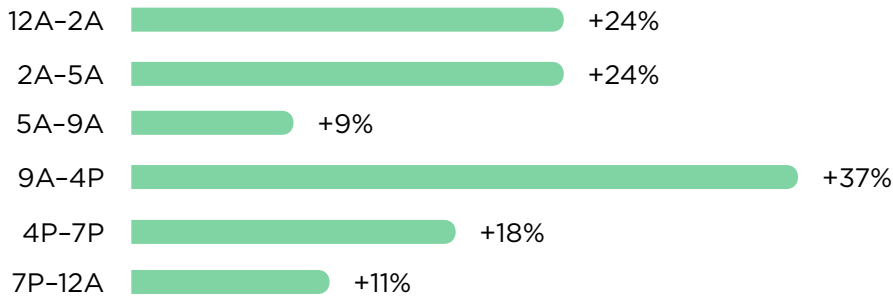
Comcast Aggregate Household Viewership Data. March 2020. Viewing change by platform.



# CHANGES IN VIEWING BY TIME OF DAY


Total TV viewing has increased throughout the day with the biggest percentage gain coming from daytime (+37%) followed by overnight (+24%).

## Viewing Change by Daypart



INCREASE IN TIME SPENT DURING DAYTIME

Comcast Aggregate Household Viewership Data. March 2020. Viewing change by time of day.



How do the dayparts contribute to the overall increase?  
77% of increase in viewing came from outside of primetime.



**Audiences** are watching throughout the day

The data gets more interesting when looking at hour-by-hour to better understand the flow of viewing throughout the day. The hours above the green line (+20% overall increase) represent those hours that had “excess gains” while hours that fell below the green line had smaller gains in Total TV viewing.

## Viewing Change by Hour



**“Excess Gains”**  
12am to 4am  
8am to 6pm

**“Gains”**  
4am to 8am  
6pm to 12am



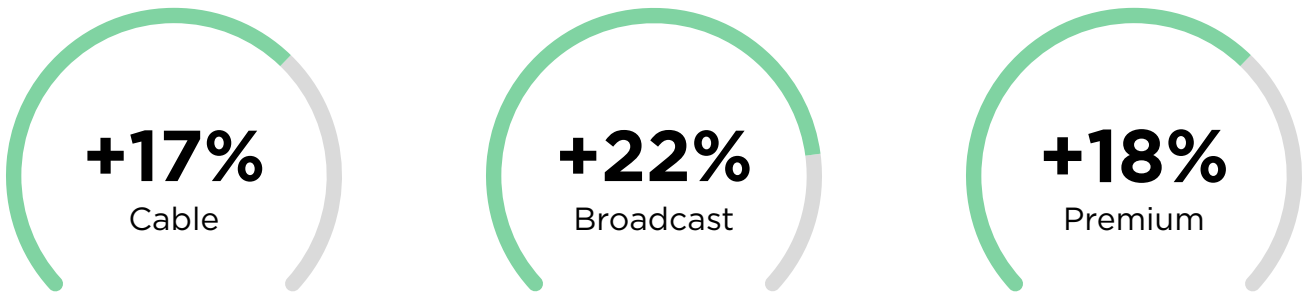
All hours matter if your **audience** is watching

Comcast Aggregate Household Viewership Data. March 2020. Viewing change by time of day.



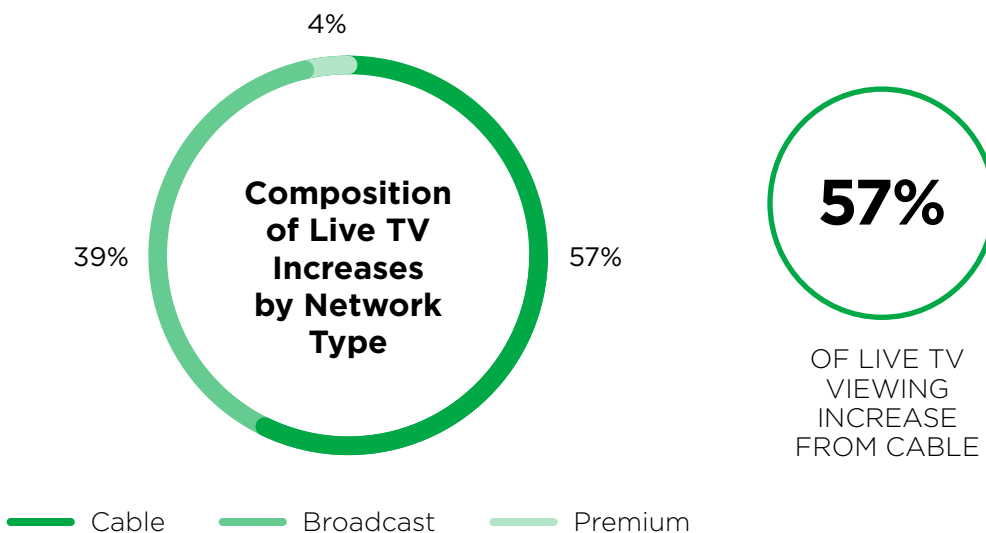
## CHANGES IN VIEWING BY NETWORK TYPE

There was an increase in viewing across platforms and throughout the day, so it is logical to ask what content are these viewers consuming? For live TV viewing, cable increased +17%, broadcast +22% and premium +18%.



Comcast Aggregate Household Viewership Data. March 2020. Viewing change by network type. Please see page 15 for a complete definition of Cable, Broadcast, and Premium.

The composition of the additional time spent with television in late March: more than half of the increase was driven by cable (57%). Broadcast was responsible for 39% of the growth.



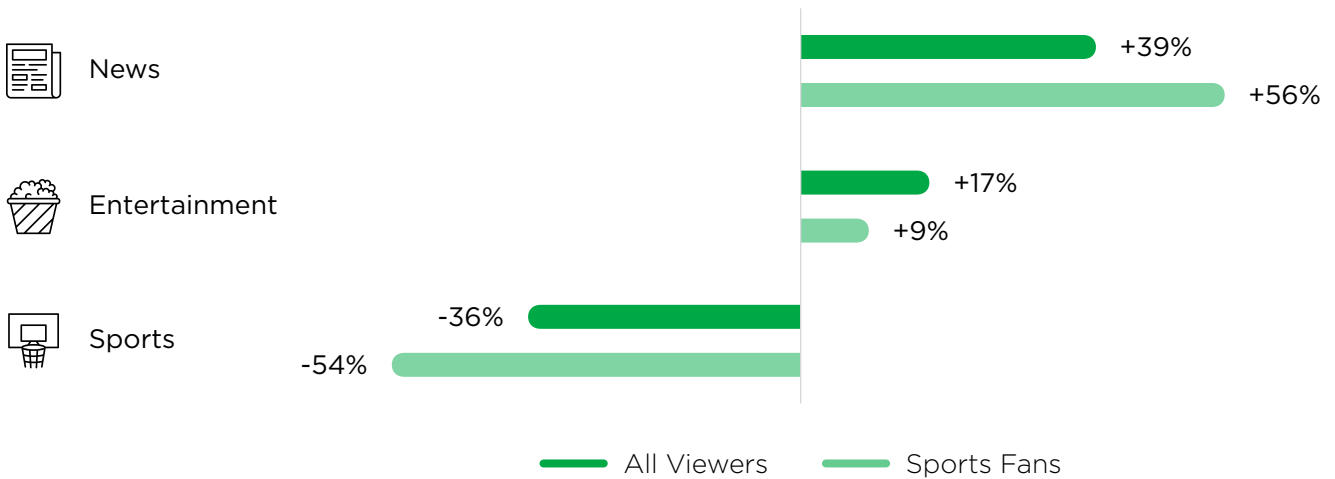
# CHANGES IN VIEWING BY NETWORK GENRE

In addition to network type, Effectv segmented cable networks into three genres: News, Entertainment & Sports. Time spent viewing on News networks increased +39%, followed by Entertainment (17%) while Sports decreased -36%.

With the cancellation of live sports, Effectv wanted to find out if sports fans were still watching as much TV and what they were spending their time watching. For this analysis, we looked at aggregated data for households that watched a large amount of NBA & NHL games. The comparison was the two weeks leading up to the cancellation of sports (3/11) and the two weeks after that date. These sports fans continued to watch TV at the same rate after 3/11.

In addition, Sports Fans watched News networks at a greater rate and Entertainment & Sports networks at a lesser rate when compared to all viewers.

## Viewing Change by Network Genre



Comcast Aggregate Household Viewership Data. March 2020. Viewing change by network genre.

Sports Fan viewing was flat following the cancellation of live sports.

Sports Fans are more likely to have turned to News networks for programming as they decreased their Sports network viewing.



**Audiences** are watching a diverse set of programming

## FIND THE AUDIENCE WHERE AND WHEN THEY WATCH

The dramatic changes in TV viewing provides further validation that viewers will find the content they crave regardless of platform, time of day and the type of content. Here are some initial learnings as a result of this change in behavior in the second half of March.



Viewers watched more TV, **up +20%**.



Live TV and STB VOD were the **major drivers** of this increase.



The daypart with the biggest increase was in **daytime, up +37%**.



The biggest increase in viewing was with **News networks, up +39%**.



Even with the loss of live sports, fans continued to watch at similar levels but across more **diverse programming**.



# Q1 2020 WRAP UP

The impact of the Covid-19 pandemic has been felt by everyone. Enforced sheltering has made the television, along with other devices, a more vital way for people to stay connected to the outside world, whether to stay informed or create distraction from the challenging times we find ourselves in.

Q1 2020 was already showing promising TV viewing growth in the first two months of the quarter, and then the pandemic compounded that increase. As viewing has not only gone up, habits have shifted in terms of time of the day and types of programming.

With large scale event-based programming missing from the schedule, data-driven advertising approaches to following audiences across these new viewership patterns is essential to reach consumers.

As the landscape and environment evolves for everyone in the coming weeks and months, we will continue to bring insights and data to marketers to help inform these data-driven practices and continue to drive positive outcomes for businesses.

The Effectv team hopes you stay safe and healthy and stands ready to help in any way we can.



# 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.



## CHRIS MCGINNIS

Chris is a senior analyst of audience insights at Effectv. In this position, he leverages his passion for data storytelling to develop narratives that educate both internal stakeholders and external industry leaders. Chris' work enables both Comcast Advertising and external marketers to better understand and value the evolving media landscape.



## JAMES ROTHWELL

James is responsible for agency, brand & industry relations at Comcast Advertising, in the U.S. and Europe. James creates thought leadership and leads advocacy through the Comcast Advertising Agency Leadership Council, the Effectv Automotive Advisory Council and the FreeWheel Council for Premium Video.



## LEE SINGLETARY

Lee manages Comcast Advertising's advisory councils in America including the Comcast Advertising Agency Leadership Council and the Effectv Automotive Advisory Council. In this role, he connects industry influencers, clients and partners, explores market dynamics, and advocates for innovation to drive the industry forward.

