COMCAST ADVERTISING

THE

[TV]

VIEWERSHIP
REPORT

MULTISCREEN TV AUDIENCE INSIGHTS FOR CAMPAIGN SUCCESS

1H 2023

Contents

About the Data

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

The comprehensive data set used for this report is from more than 29 million households (HHs), including independently aggregated viewership data, whose members watched nearly 14 billion hours of TV. Additionally, ad exposure data from 40,000 multiscreen campaigns garnering over 3 billion impressions is included in this report.

Introduction

Common Data-Backed Strategies Lead to Video Ad Campaign Success

Comcast Advertising's latest edition of The TV Viewership Report (TVR) features first-half 2023 data and analysis of the multiscreen TV landscape. The findings indicate that while viewers are engaging with video content in new ways, the large majority of multiscreen advertising reach still comes from traditional TV (77%). Streaming has proven to be a valuable way to reach light and no-TV viewing HHs and new data shows that free ad-supported streaming TV (FAST) impressions are more likely to be seen within those HHs.

Brands that optimize reach and results are deploying a common approach with traditional TV as the foundation and streaming as a supplement to reach those hard-to-reach viewers. After analyzing 40,000 multiscreen campaigns, Comcast Advertising found that those with the highest reach shared similar attributes providing a roadmap for advertisers to maximize their reach across platforms.

Read on to discover these campaign strategies and how you can incorporate them into your video advertising plans. As always, you'll discover video consumers' viewership behavior across screens on pages 6-10.

1H 2023 Key Findings

01 **Traditional TV is vital for ad campaigns**

77% of multiscreen advertising campaign reach came from traditional TV

02 **Share of streaming reach increases**

The share of reach unique to streaming has increased from 9% to 13%

03 **Highest reaching campaigns include similar elements**

Multiscreen TV ad campaigns with the highest reach include several strategic similarities to maximize reach

04 **Streaming helps with hard-to-reach HHs**

Streaming impressions were 4.6x more likely to reach light and no-TV viewing HHs; VOD and FAST provide opportunities to reach hard-to-reach households

05 **Streaming allocation maximizes reach**

Reach peaks when 20-30% of investment is allocated to streaming

Viewer Experiences are Diverse

2,000+
publishers including
170 TV networks

⇢

4,000+
endpoints* delivering
premium video content & ads

Reaching audiences at scale comes from bringing content and access together.

⤓ DOWNLOAD CHART

Endpoints are unique publisher and device viewership combinations.

Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (1H '23). Endpoints with at least 100 impressions included in analysis.

The Latest In: Traditional TV Viewership

Households spend nearly 6 hours per day watching traditional TV

Breakdown of Traditional TV

89%
Of Viewing is Live

5:56
Spent per Day*
1H 2023

28
Networks Avg Per HH

72%
Outside of Prime

68%
On Cable

⬇ DOWNLOAD CHART

Note: Time spent per day includes Live, DVR, and VOD viewing.

Sourcing: Comcast Aggregated Viewership Data (1H '23).

For those who tune in, traditional TV remains strong. A data-driven approach reaches desired audiences throughout the day across many networks.

Guide / TV Listings — Press Guide to change view — 9:41a 73 °F

Today 4/14 | 9:30a | 10:00a | 10:30a | 11:00a | 11:30a | 12:00p

myTV 9 | The 700 Cl | Fox Weather Sky Dome | Law & Order: Special Victi | Dateline

10 55 | Hot Bench | America's C | America's C | Justice With | Justice for / | Supreme

xfinity | America's Hidden Geniuses — Learning critical skills for the tech industry

PIX⑪ 11 | PIX11 Morr | PIX11 Morning News at 1 | Couples Co | Judge Jerry | The Steve

USA 12 | Law & Orde | Law & Order: Special Victi | Law & Order: Special Victi | Law & Ord

America's Hidden Geniuses — Learning critical skills for the tech industry
SPONSORED Black men have the highest unemployment rate of any race or gender group and are underrepresented in the tech industry. Learn how hidden geniuses are learnin... Details TV-PG

The Latest In: Streaming TV Viewership

The majority of streaming happens on the big screen

Breakdown of Streaming Usage

81%
of streaming happens on the TV screen*
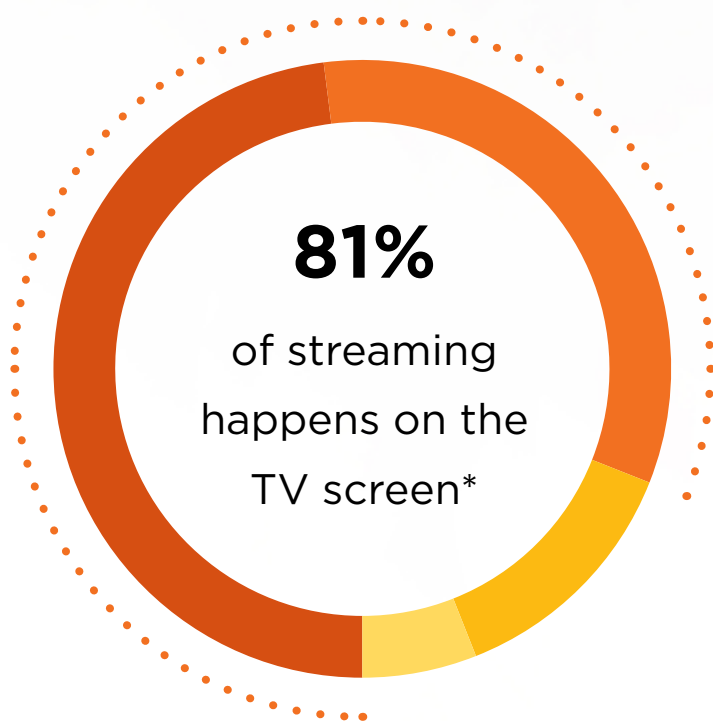
⬇ DOWNLOAD CHART

Streaming consists of impressions viewed via:

48%
CTV

33%
STB

13%
Mobile

6%
Desktop
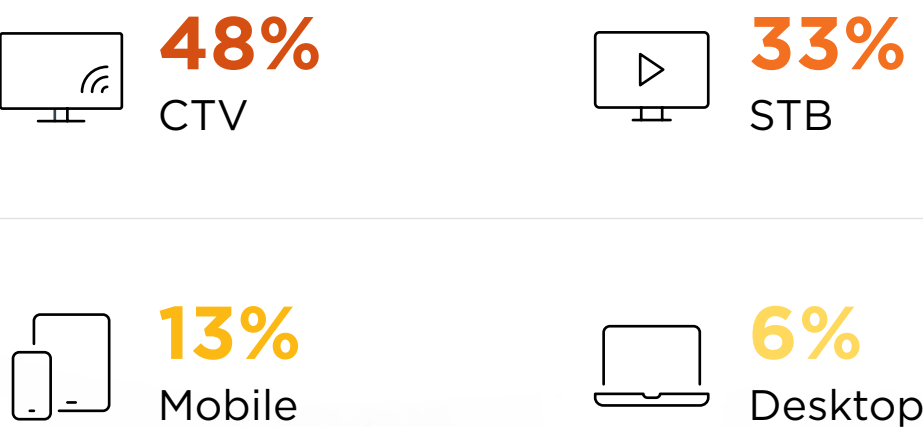
When it comes to all the devices consumers have available to watch video content, they opt for the largest screen available. Additionally, the communal experience of watching on a TV screen means advertisers can reach more viewers at a time.

Comcast Advertising streaming is our 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. Streaming also includes viewing from Xfinity on Demand.

**Video on Demand (VOD) in this context is Xfinity on Demand served via an Xfinity set-top box.
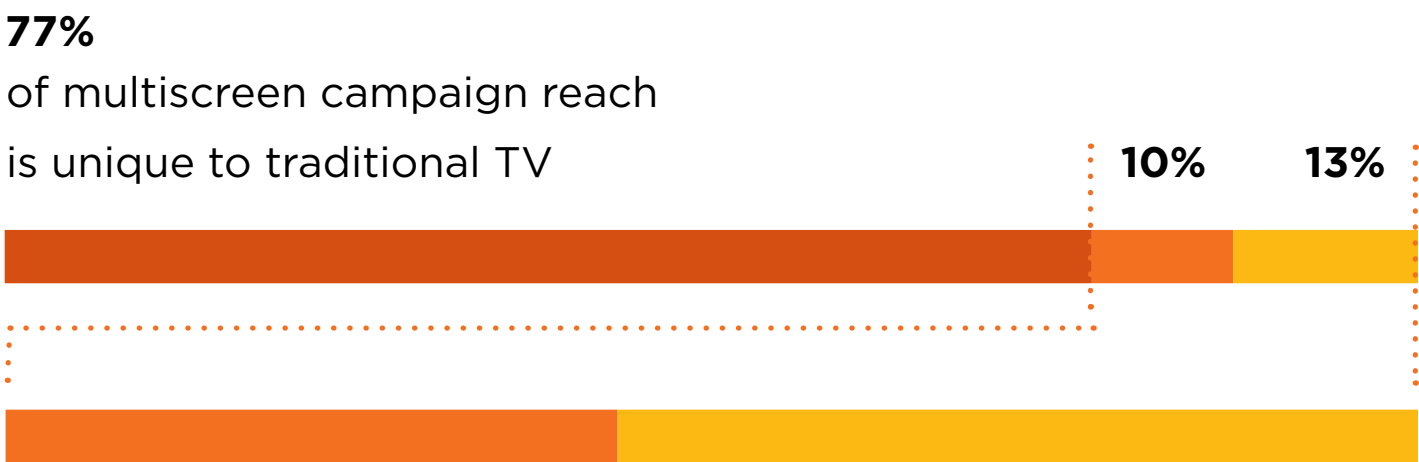
Sourcing: Comcast analysis of streaming campaigns (1H '23).

TV Drives Majority of Campaign Reach, While Streaming Adds Incremental Reach

Of the 40,000 multiscreen campaigns measured, 77% of reach was unique to traditional TV, while 13% was unique to streaming.

Share of Campaign Reach

77%
of multiscreen campaign reach
is unique to traditional TV

10%   **13%**

43%
both TV & Streaming

57%
of HHs reached by streaming were
incremental to those reached by TV

■ TV Only   ■ TV & Streaming   ■ Streaming Only

(!) **For advertisers, multiscreen TV provides both scale and unique audience reach.**

⤓ DOWNLOAD CHART

Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (1H '23).
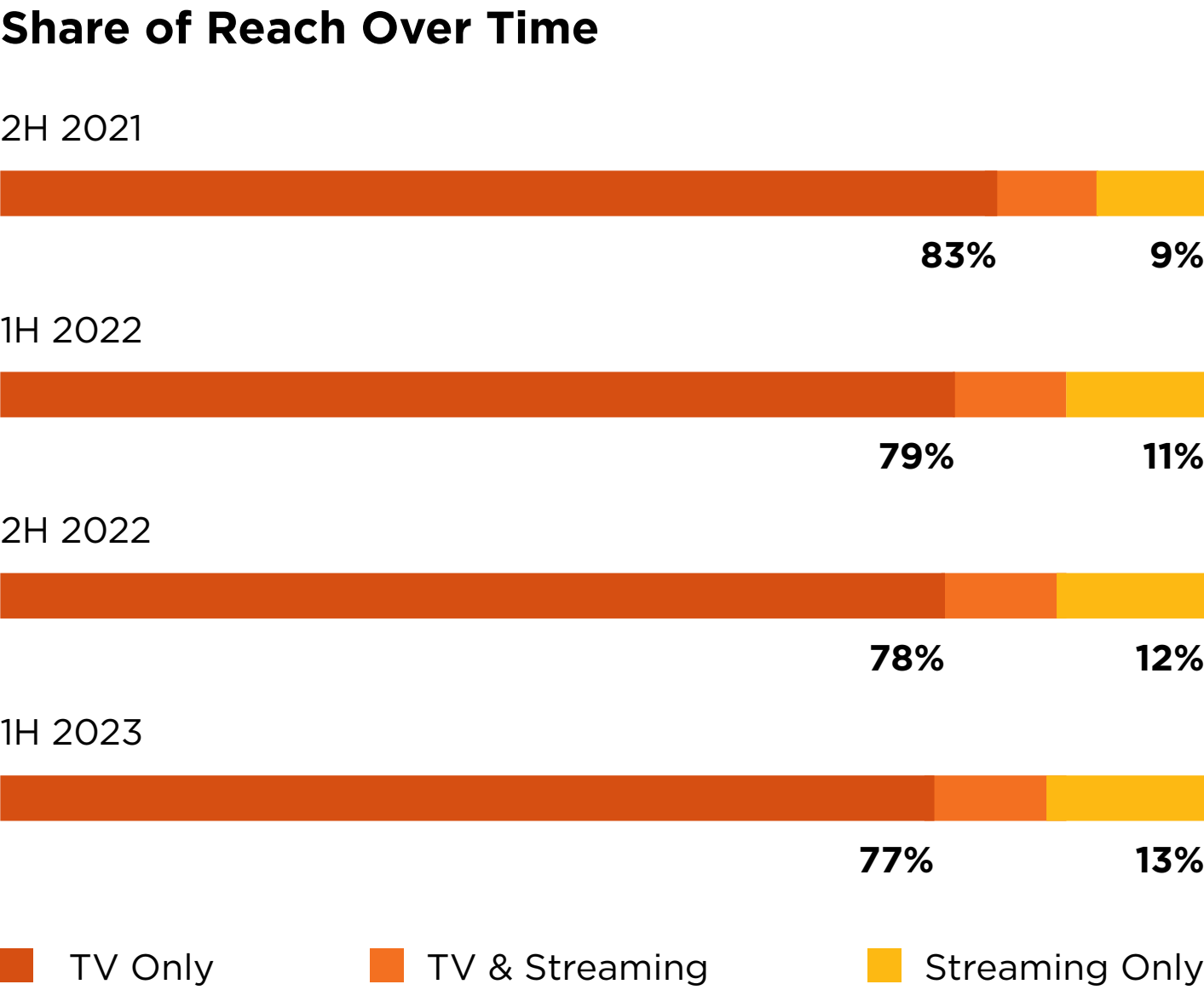
Streaming's Share of Reach Grows, TV Remains Foundational

As audiences engage with premium video content in new ways, share of reach is slowly shifting from traditional TV to streaming. While traditional TV provides the vast majority of campaign reach, the growth in share of reach unique to streaming (9% in 2H '21 to 13% in 1H '23) emphasizes streaming's ability to reach incremental audiences. A streaming-only approach would severely limit reach.

(!) **It's becoming increasingly important for advertisers to combine traditional TV and streaming in their video advertising strategy.**

⤓ DOWNLOAD CHART

Share of Reach Over Time

2H 2021

83%   9%

1H 2022

79%   11%

2H 2022

78%   12%

1H 2023

77%   13%

■ TV Only   ■ TV & Streaming   ■ Streaming Only

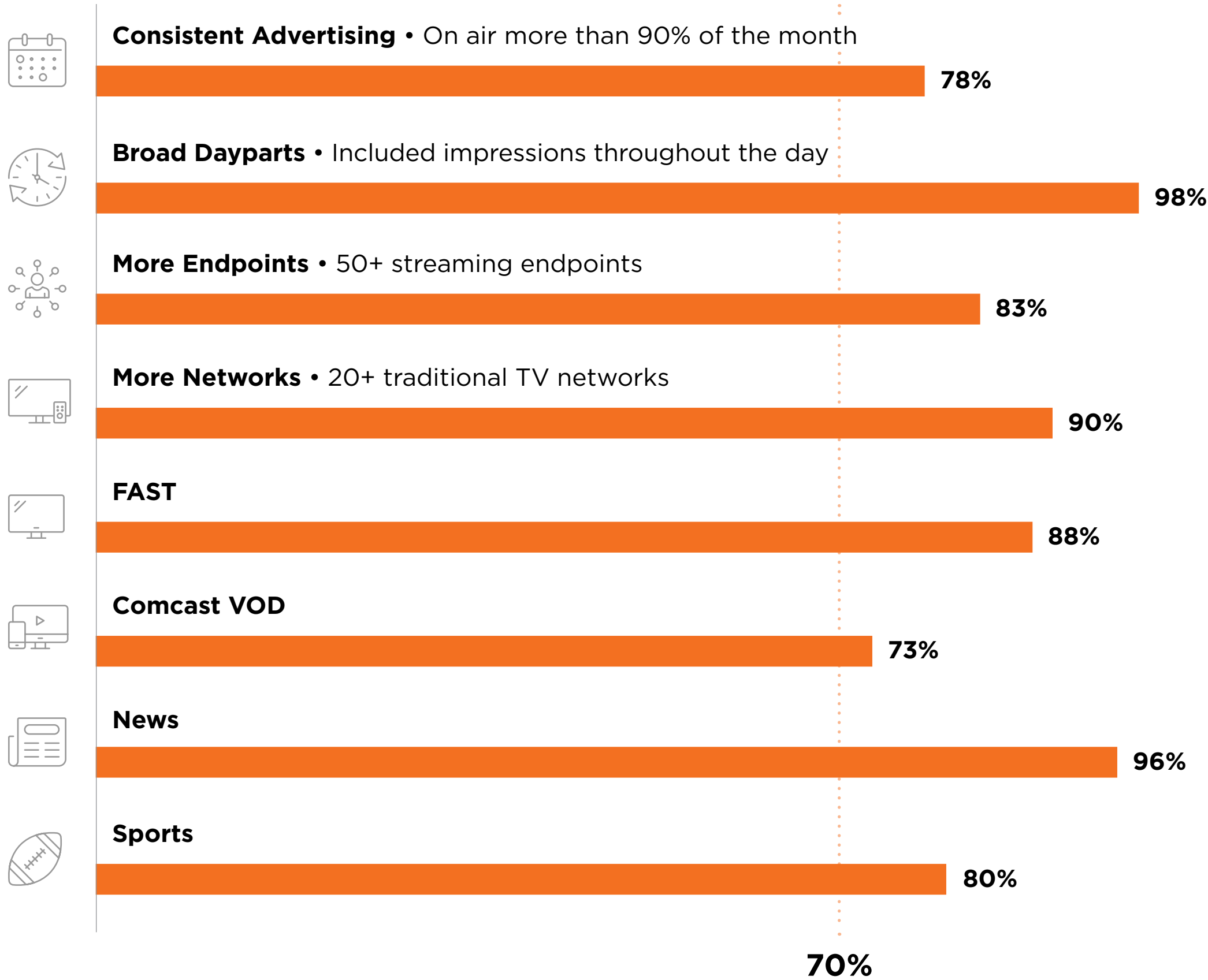# Highest Reaching Campaigns Use Common Strategies

Comcast Advertising evaluated approximately 40,000 ad campaigns airing across traditional TV and streaming content over a one-month time period. Of those, the 1,000 highest reaching campaigns were analyzed to uncover what set them apart. These high-reaching campaigns shared several strategies including consistent advertising across endpoints and times of day.

(!) More than 70% of the highest reaching campaigns included similar strategies to reach audiences where and when they watch.

⤓ DOWNLOAD CHART

Video on Demand (VOD) in this context is Xfinity on Demand served via an Xfinity set-top box.
FAST – Free ad-supported streaming TV.

Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (1H '23). Filtered to the 1,000 highest reaching campaigns.

Inclusion Percentage of Highest Reaching Campaigns

Consistent Advertising • On air more than 90% of the month
78%

Broad Dayparts • Included impressions throughout the day
98%

More Endpoints • 50+ streaming endpoints
83%

More Networks • 20+ traditional TV networks
90%

FAST
88%

Comcast VOD
73%

News
96%

Sports
80%

70%

Streaming Delivers Hard-to-Reach Households
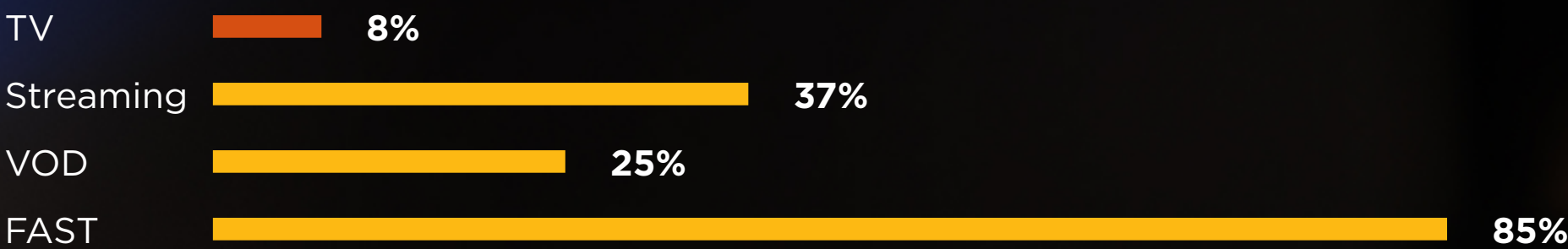
Streaming impressions were

4.6x

more likely to be seen within light and no-TV viewing households (vs. traditional TV)

FAST impressions were

10.6x

more likely to be seen within light and no-TV viewing households (vs. traditional TV) and 2.3x more likely than total streaming

Impressions to Light and No-TV Viewing HHs

TV	8%
Streaming	37%
VOD	25%
FAST	85%

(!) **Streaming, including FAST and VOD, are more likely than traditional TV to reach light/no-TV viewing households.**
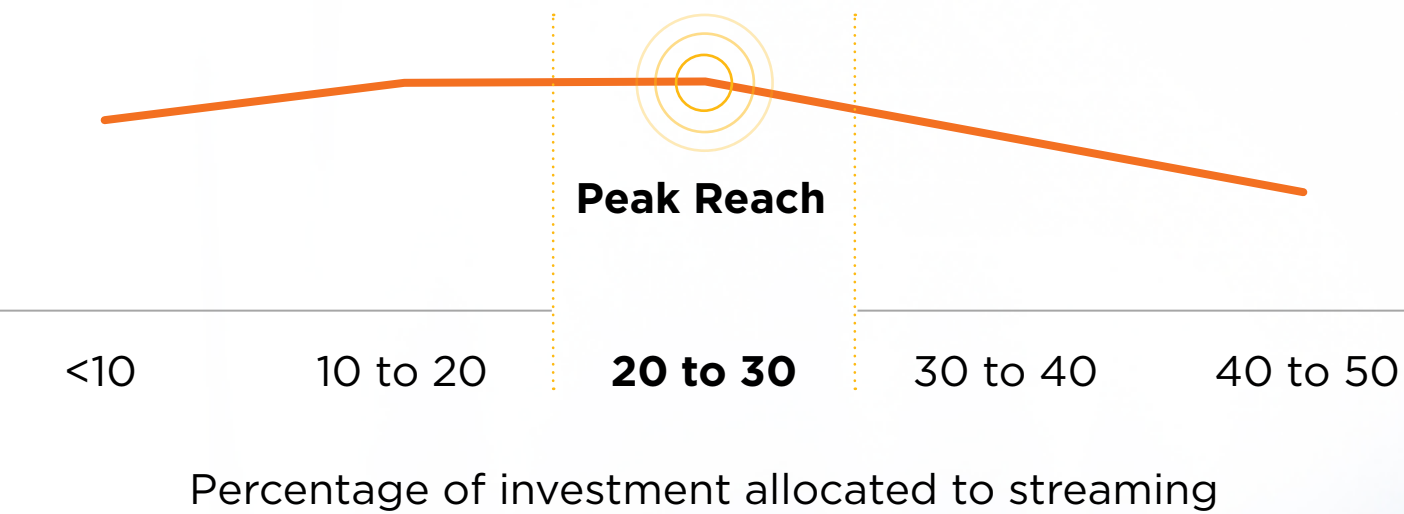
⬇ DOWNLOAD CHART

No-TV viewing HHs are defined as those with no TV service or TV viewing from 1H '23. 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.

Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (1H '23).

Multiscreen TV Recommendation

Beyond 30% there are diminishing returns as the benefits of streaming were outweighed by the minimization of traditional TV.

Comcast Advertising's ongoing analysis of more than 100,000 multiscreen campaigns since 2021 has continued to support the finding that reach peaks when 20 - 30% of investment is in streaming.

20-30% Campaign reach was highest when this level of investment was allocated to streaming

Multiscreen TV reach is dependent on investment allocation

Peak Reach

| <10 | 10 to 20 | **20 to 30** | 30 to 40 | 40 to 50 |

Percentage of investment allocated to streaming

⬇ **DOWNLOAD CHART**

Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (1H '23).

COMCAST
ADVERTISING

Comcast Advertising is an audience delivery company. We use first-party data to target advertisers' audiences across linear TV, streaming, and video on demand. In addition, advertisers can utilize its in-house creative agency, Mnemonic, to craft compelling messages as well as easily and affordably build campaigns. Comcast Advertising has a presence in 60+ markets and an estimated reach of 96 million U.S. adults that include both Comcast and non-Comcast households.*

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

Authors

Annie Hagerty
Manager of Insights,
Comcast Advertising

In this 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
Sr. Manager of Brand & Industry Relations,
Comcast Advertising

Lee leads content strategy at Comcast Advertising, Comcast Advertising's parent company, where he works alongside the brightest minds media to create and distribute insights for buy and sell-side audiences. Lee also manages the Agency Leadership Council, proactively supporting the interests of the advertising agency and identifying topics to advance the industry.

Travis Flood
Executive Director of Insights,
Comcast Advertising

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.

Andrea Busch
Sr. Manager of Insights,
Comcast Advertising

With a keen interest in consumer research and a knack for analyzing large datasets, she provides valuable insights into the ever-changing video ecosystem, aiding both buyers and sellers of premium video content. Her focus on thought leadership aims to drive innovation and progress within the industry.