



THE
[TV]
VIEWERSHIP
REPORT

MULTISCREEN TV AUDIENCE INSIGHTS FOR CAMPAIGN SUCCESS
2H 2023



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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 made up of independently aggregated viewership data from more than 29 million households (HHs), whose members watched nearly 14 billion hours of TV in 2H 2023. Additionally, ad exposure data from over 45,000 multiscreen campaigns garnering 3 billion impressions is included in this report.

Introduction

News and Sports Drive Unique Reach for Multiscreen TV Campaigns

Comcast Advertising's latest edition of The TV Viewership Report (TVR) features second-half 2023 data and comprehensive analysis of the multiscreen TV campaigns. The latest findings indicate nearly three-fourths of multiscreen campaign reach is unique to traditional TV vs. streaming, an important distinction for advertisers seeking efficient ways to reach audiences across multiple screens and endpoints.

In 2023, the lines between traditional TV and streaming services blurred for sports programming, marked by *Thursday Night Football* airing exclusively on a streaming platform. Earlier this year, Peacock's exclusive airing of the NFL *AFC Wild Card* game became the biggest live-streamed event in U.S. history. Regardless of where or how viewers tune in, a Comcast Advertising analysis showed that a significant portion of multiscreen reach was unique not only to sports content, but to news as well.

Real-time, live viewing is a major component of both news and sports specifically, as it's important for these audiences to stay up to speed on current events and sports scores alike. In Comcast households (HHs), 91% of traditional TV viewing happens live and approximately 2 hours per day is spent watching news and sports content, presenting a notable reach opportunity for advertisers.

While audiences will continue to toggle between [premium video](#) sources and platforms, it's important for advertisers to consider the available ad-supported ways to reach them.

Read on to discover additional campaign strategies and how you can incorporate them into your premium video advertising plans. As always, you'll locate video consumers' viewership behavior across screens on pages 5-10.



2H 2023 Key Findings

01 Traditional TV is vital for video ad campaigns ☺

73% of multiscreen advertising campaign reach comes from traditional TV.

02 Streaming provides incremental reach ☺

58% of households reached by streaming are incremental to those reached by TV.

03 Streaming delivers hard-to-reach households ☺

Streaming impressions are 2.8X more likely to be delivered within light/no-TV households.

04 News and sports extend reach for advertisers ☺

34% of multiscreen campaign reach is unique to news and sports, which are often viewed live.

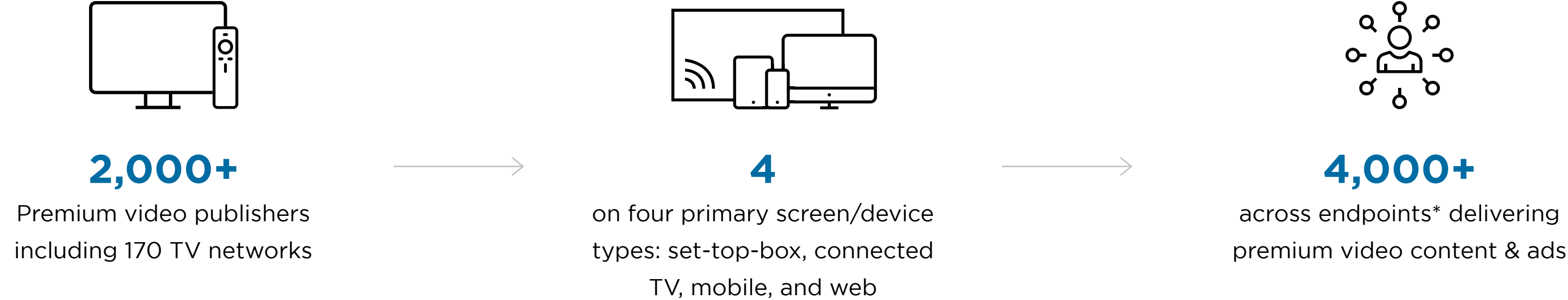
05 Streaming allocation maximizes reach ☺

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



Reaching Audiences When and Where They Are Watching

To reach audiences at scale, advertisers must consider the diversity in viewing experiences available today. Audiences are watching premium video content across more screens and platforms than ever. Here's what and where our audiences are watching...



! While there are thousands of ways to reach audiences, access to great content is enabled through media partners who uphold a high standard for video content. Premium video is content delivered transparently, in a trusted brand-safe environment, seen by real people within a high-quality viewing experience. [Learn more](#)

*Endpoints are unique publisher and device viewership combinations.
Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (2H '23). Endpoints with at least 100 impressions included in analysis.



The Latest In: Traditional TV Viewership

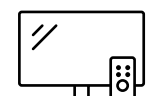
Households spend over 6 hours per day watching traditional TV

Breakdown of Traditional TV



91%

Of Viewing is Live



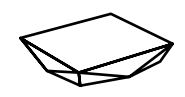
28

Networks Avg Per HH



72%

Outside of Prime



67%

On Cable

[↓ DOWNLOAD CHART](#)

*Note: Time spent per day includes Live, DVR, and VOD viewing.
Sourcing: Comcast Aggregated Viewership Data (2H '23).



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

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*



Streaming consists of impressions viewed via:



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*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 (2H '23).



When it comes to all the devices consumers have available to watch premium 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.

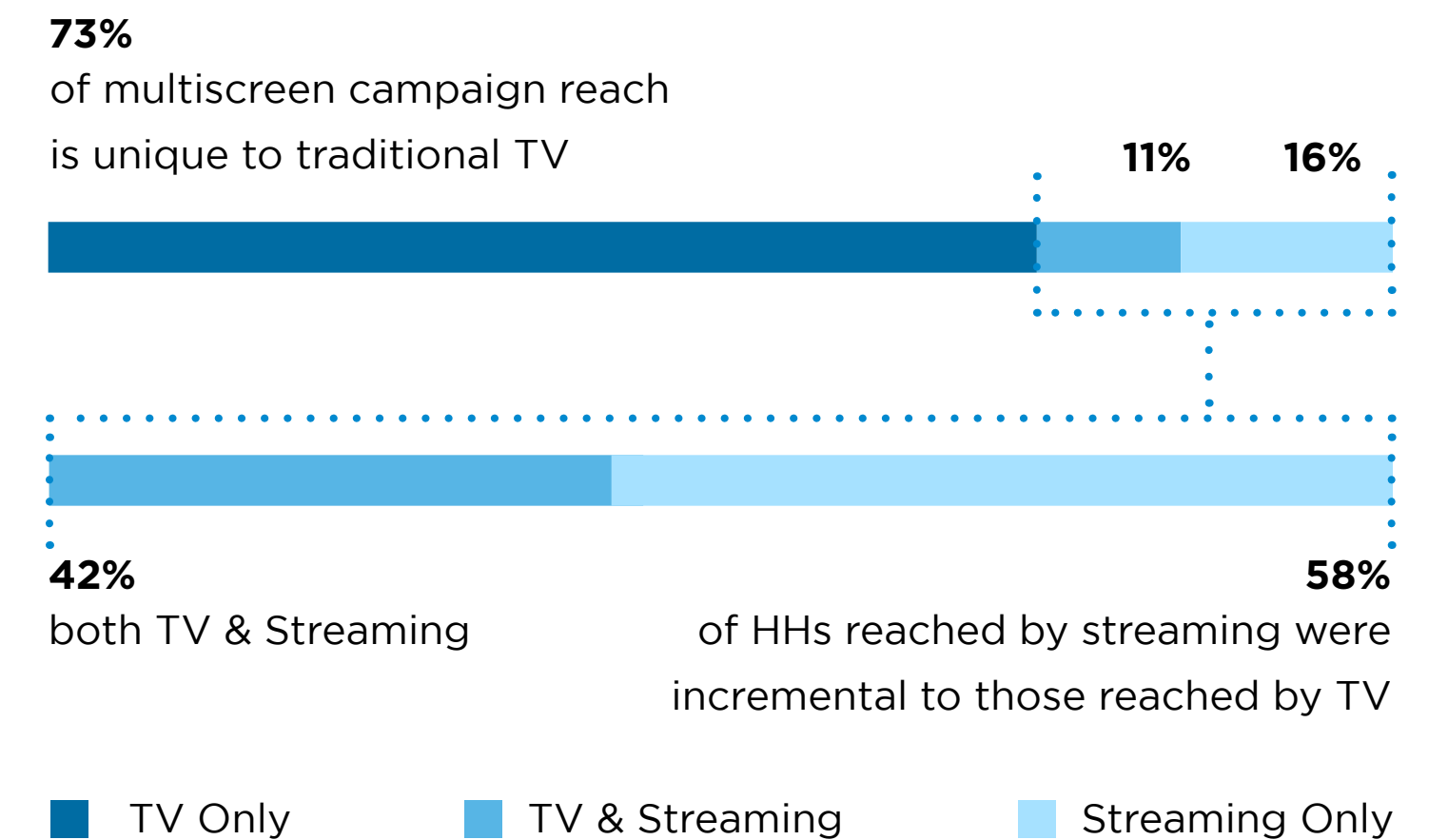


TV Drives Majority of Campaign Reach, While Streaming Adds Incremental Reach



Within the 45,000+ multiscreen campaigns measured, 73% of reach was unique to traditional TV, while 16% was unique to streaming.

Share of Campaign Reach



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

Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (2H '23).

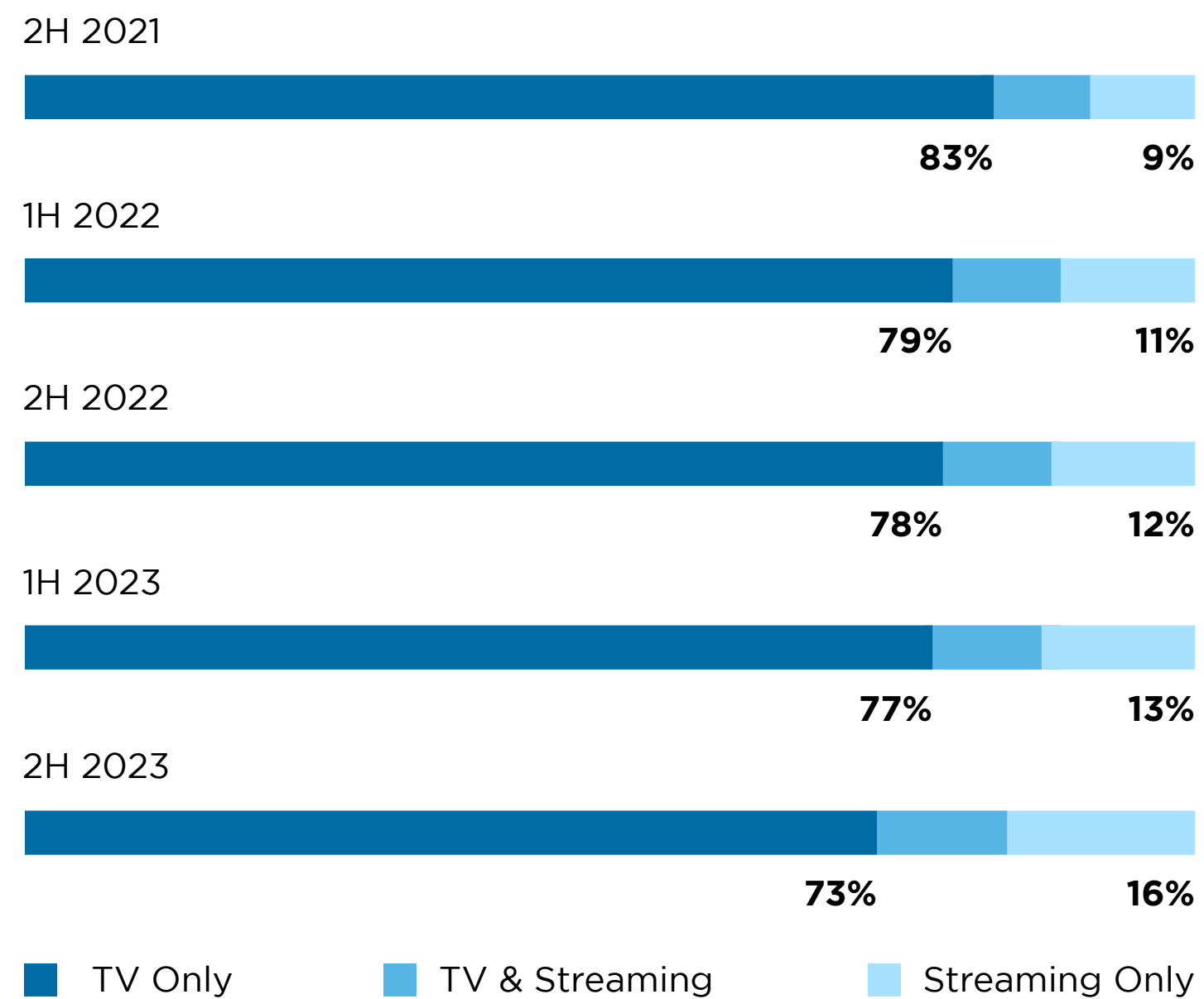
Streaming's Share of Reach Grows, TV Remains Foundational

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 16% in 2H '23) emphasizes streaming's ability to reach incremental audiences. Still, when you consider the premium video options available to audiences today, a streaming-only approach would severely limit campaign reach, emphasizing the importance of a multiscreen TV approach.



To reach audiences in premium video environments today, it's important for advertisers to combine traditional TV and streaming in their video advertising strategy. See [page 14](#) for Comcast Advertising allocation recommendation.

Share of Reach Over Time



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Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (2H '23, 1H '23, 2H '22, 1H '22, and 2H '21).

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Streaming Delivers Hard-to-Reach Households

Streaming impressions were

2.8X

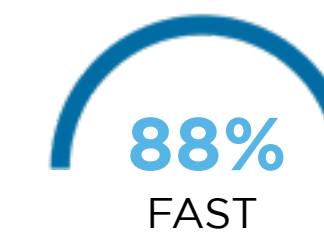
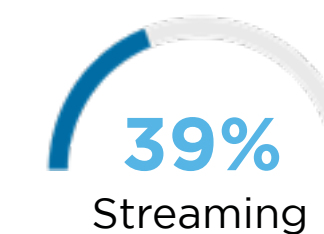
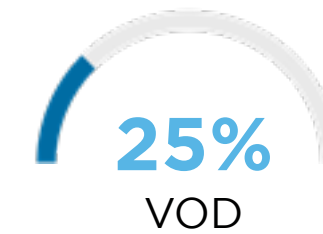
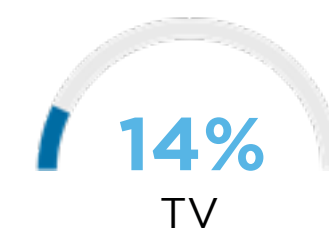
more likely to be seen within light and no-TV viewing households (vs. traditional TV)

FAST impressions were

6.3X

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

% of Impressions Delivered to Light/No-TV Viewing HHs



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! Streaming is more likely than traditional TV to reach light/no-TV viewing households. This is especially true for impressions delivered through FAST.

*No-TV viewing HHs are defined as those with no TV service or TV viewing from 2H '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 (2H '23).

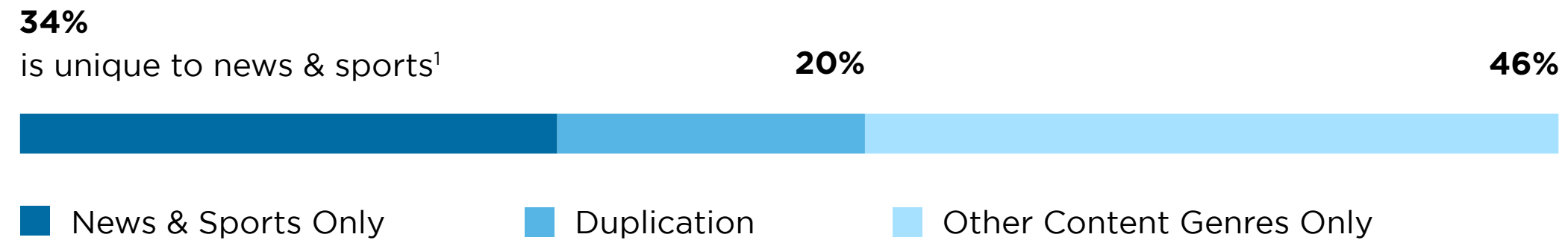
News & Sports: A Way to Increase Reach Across Screens

Comcast Advertising research shows that news and sports programming — inclusive of live viewing, replays, cable TV and streaming — represents a huge opportunity for multiscreen campaign success. While sports content is bifurcating across traditional TV and streaming, it remains an important reach factor for engaged audiences who generally prefer to watch live and in real time.

Of the multiscreen campaigns that included news and sports, Comcast Advertising found that 34% of reach was unique to the news and sports genre portion of the campaign.



Share of Multiscreen Campaign Reach



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Additional News & Sports Insights

2 Hours

per day is spent viewing news & sports content live²

97%

of all HHs analyzed were reached by news & sports content¹

40%

of multiscreen campaign reach is unique to news & sports within hard-to-reach HHs¹

! There's opportunity for advertisers to achieve significant reach among news and sports viewers who are often watching this content live.

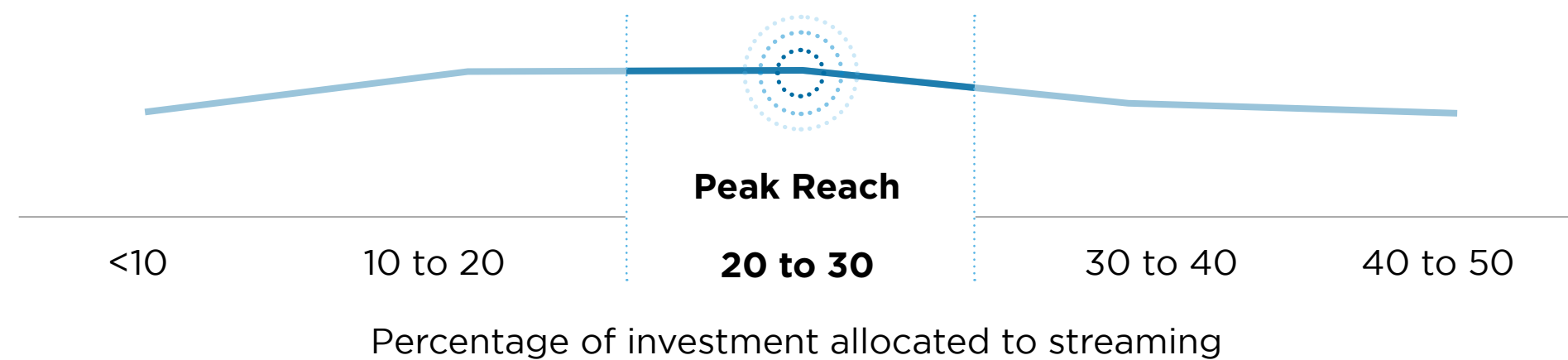
Sourcing: 1. Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (2H '23). Sports & News defined as major Sports and News Networks. 2. Comcast Aggregated Viewership Data 2H'23.

Multiscreen TV Recommendation

Comcast Advertising's ongoing analysis of nearly 150,000 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



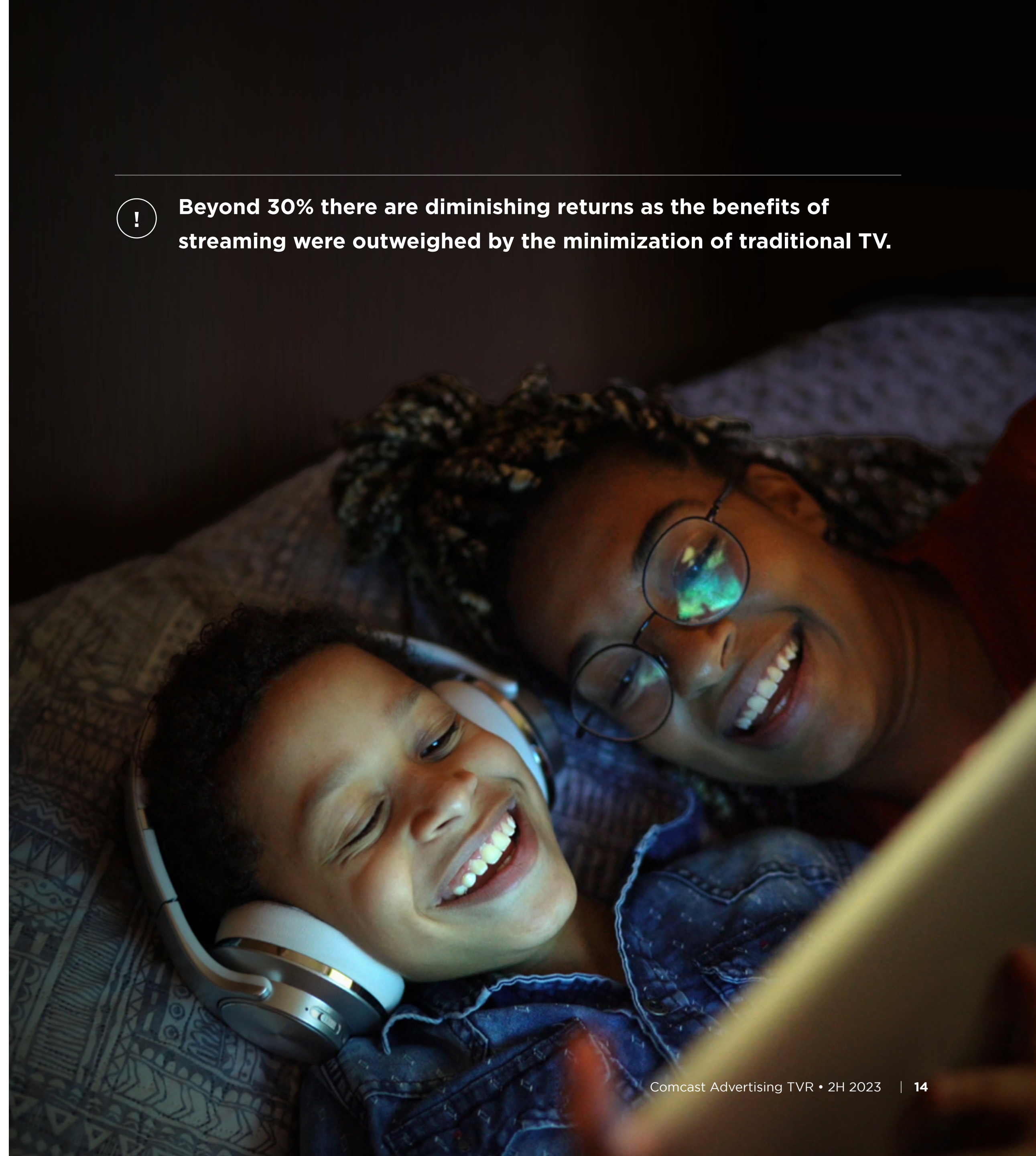
[↓ DOWNLOAD CHART](#)

Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + streaming campaigns (2H '23).

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





Comcast Advertising delivers impactful TV and streaming ad solutions using aggregated first-party Comcast data insights to help businesses reach the right customers. 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



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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.



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.



Cole Zaharris

Sr. Analyst, Comcast Advertising

Cole applies her expertise in analyzing large-scale data sets to inform strategic business decisions at Comcast Advertising. Her passion for transforming raw data into actionable insights helps drive Comcast Advertising's impact across the TV and advertising technology industries.

Sourcing: *Estimate based on U.S. census of broadband subscriber households in Comcast-represented U.S. counties.



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