

Q2 2020

— THE —
[TV]
VIEWERSHIP
REPORT





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THE CURRENT STATE OF TV VIEWING ACROSS THE COMCAST FOOTPRINT

In this edition of The TV Viewership Report, we explore viewership trends for Q2 2020 compared to the same period last year, as well as Q1 2020 in some instances.

As with the **Q1 special edition report**, TV viewership in Q2 remained high as people spent more time indoors and looked to their televisions and connected devices for entertainment and information.

While sports has taken a hiatus in the past few months, events are beginning to return to stadiums and screens. Even with limited sports available in Q2, sports fans have proven to be some of the most loyal TV viewers.

We expect sports viewership to remain strong for the remainder of the year as fans, who are unable to see their favorite teams in person, tune in to watch after a long break.

Q2 2020 KEY FINDINGS

01 In Q2 2020, Comcast households (HHs) consumed 8.5 billion hours of TV viewing: that's the equivalent of 17 hours of additional viewing time per HH in the quarter vs. the same time period last year

02 Comcast HHs spent 15 more minutes with television daily in Q2 2020 compared to last year

03 Over the last eight quarters of measured data, there has been an increase in time spent with television with each year-on-year (YoY) comparison

04 Cable TV share increased six percentage points from weekday to weekend—that's significant considering share between the two are typically consistent

05 Sports returned in Summer 2020 with the MLB, NHL and NBA. The starts (and restarts) of their seasons averaged a viewership increase of 71% over last year





BILLIONS OF HOURS OF VIEWING & A SHIFT FOR SPORTS

This unprecedented time has led to unprecedented viewership. On average, Comcast HHs spent 15 more minutes with TV every day in Q2 2020 vs. last year and those same HHs consumed 8.5 billion hours of TV viewing—that's an increase of over 200 million hours YoY.

Nearly all 2020 sports were impacted due to COVID-19, but the returns are looking strong and fans, starved of competition and their favorite teams, are tuning in. We know that 98% of all sports programming airs on cable,¹ 91% of those sports programs are watched live,² and cable networks are now reporting historic tune-in numbers.

MLB Opening Day games drew a record average of 4 million viewers, up 232% from last year, according to ESPN.³ That makes them the most-watched regular-season MLB games on any network since 2011.

For its part, the PGA Tour was one of the first sports in the U.S. to resume airing live events and viewers watched in record numbers, and remained engaged for longer. The first three golf events held this June (Charles Schwab Challenge, RBC Heritage and the Travelers' Championship) were watched an average of 28 minutes longer than the same events in 2019.

Viewership data has also uncovered that prior to sports' restart, this year's sports audiences didn't stop watching TV when games were absent, rather their viewership moved elsewhere.

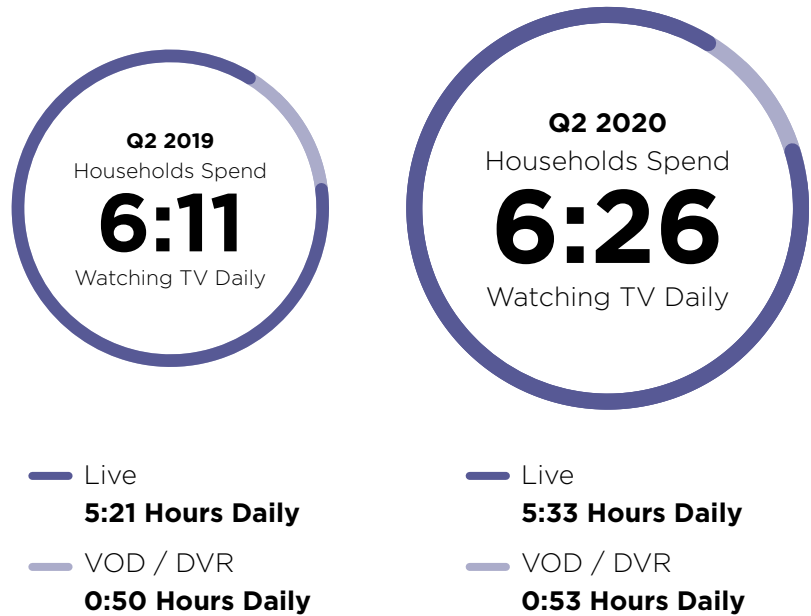
The second half of this report delves into viewership trends for sports such as MLB, NBA and others making their return to the screen, and highlights The Effectv Sports Matrix, which advertisers can use to find audiences tuning into the full spectrum of sports.

1. Nielsen NPOWER, CY 2019, ALL SN-SE-SC-SA Program Types. Based on total duration of programming. 2. Nielsen National TV View. Calendar year 2019. Sports Events rating comparison of Live and Live+7. 3. <https://www.cnbc.com/2020/07/24/espns-mlb-opening-day-games-draws-average-of-4-million-viewers.html>

TIME SPENT WITH TV REMAINS ABOVE 6 HOURS PER DAY

VIEWING +4% - +15 MIN PER DAY - OVER LAST YEAR.

Looking back at time spent with television during Q2 2020, there was a **total increase of +15 minutes in viewing time** per day versus 2019. Live viewing accounted for around 86% and VOD/DVR accounted for 14% of all daily viewing across Comcast HHs for the quarter. In Q2 2020 across 17M Comcast HHs, there was an average of 6 hours and 26 minutes of daily TV viewing.



Comcast Aggregate Household Viewership Data. Average daily time spent with live and time-shifted (DVR/VOD) viewing. Time period as indicated in chart.

YOY TV VIEWING BY QUARTER

Over the last eight quarters of measured data, there has been an increase in time spent with television with each YoY comparison.

The increase from Q2 2019 to Q2 2020 speaks volumes to the resilience of media and entertainment during a unique time. Viewership increased even in the absence of live sports programming.



LIVE VIEWING



VOD/DVR VIEWING



— Live Hours Per Day — VOD & DVR Per Day

Comcast Aggregate Household Viewership Data. Q3 2018 - Q2 2020. Comparison of average daily time with live and time-shifted (DVR/VOD) viewing.



Measured Hours in Q2 2020

Total hours consumed across the quarter was 8.5 billion (an increase of over 200 million hours YoY). That's the equivalent of **17 hours of additional TV viewing time per Comcast HH** in the quarter vs. the same time period last year. Even in an evolved video landscape, Effectv continues to see growth in overall household TV viewing.

Source: Comcast Aggregate Household Viewership Data. Gross hours measured in Q2 2020. Includes live, time-shifted, cable, broadcast, and DVR viewing.

DISSECTING Q2 GROWTH

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

Overall, the YoY increase from 6:11 to 6:26 (+15 minutes) can be attributed to a few factors:

- **VOD/DVR:** +3 minutes
- **Cable:** +13 minutes
- **Broadcast:** +5 minutes
- **Premium:** -6 minutes

See page 15 for definitions of these categories.

Take a deeper dive →

Q2 2020
6:26

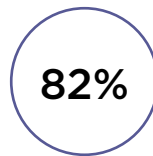
+15% Increase in daily time spent with **VOD**
(0:30 in '20 vs 0:26 in '19)

-4% Decrease in daily time spent with **DVR**
(0:23 in '20 vs 0:24 in '19)

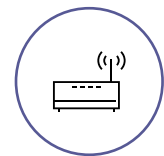
0:53

The story is true across most markets with:

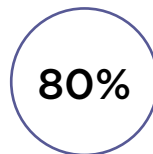
5:33



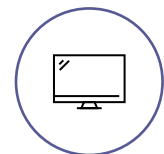
of markets showing an increase in total viewing



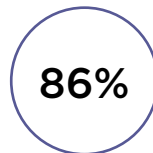
+6% increase in daily time spent with **Cable** networks
(3:48 in '20 vs 3:35 in '19)



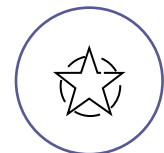
of markets showing an increase in linear viewing



+5% increase in daily time spent with **Broadcast** stations
(1:36 in '20 vs 1:31 in '19)



of markets showing an increase in time-shifted viewing



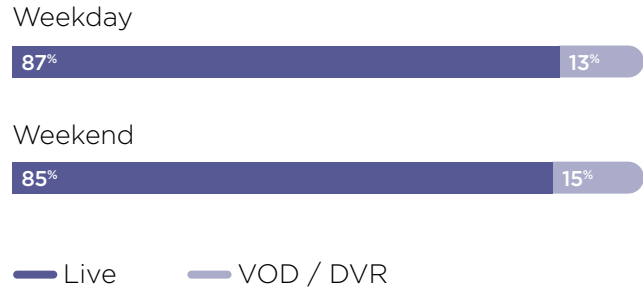
-40% decrease in daily time spent with **Premium** networks
(0:09 in '20 vs. 0:15 in '19)

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

— Live Hours Per Day — VOD & DVR Per Day

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

Between 85% and 87% of all viewing happens live. That's consistent with both Q1 and Q2 2020 viewing. The share between live and time-shifted viewing also tells a story of consistency: live maintained the majority of share over time-shifted consumption across Comcast HHs and has done so dating back to the first instance of recorded data.

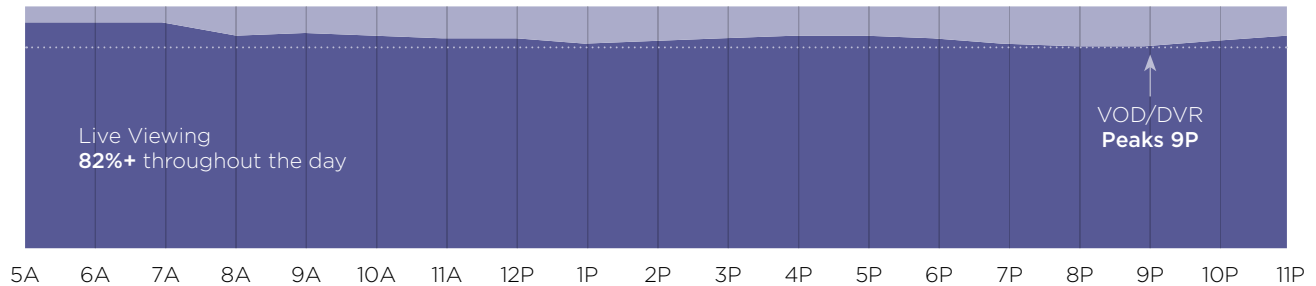


Comcast Aggregate Household Viewership Data. Share of daily time spent with live vs time-shifted viewing. Time period as indicated above.

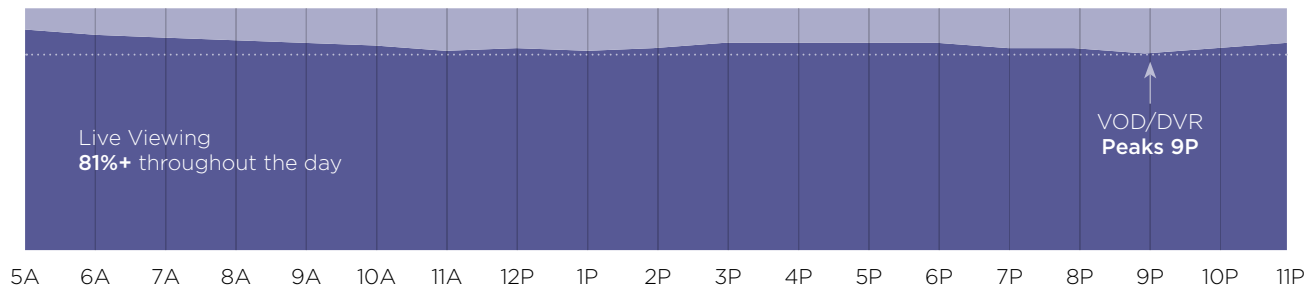
TIME-SHIFTED SHARE ON WEEKDAYS VS. WEEKENDS

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

Weekday



Weekend

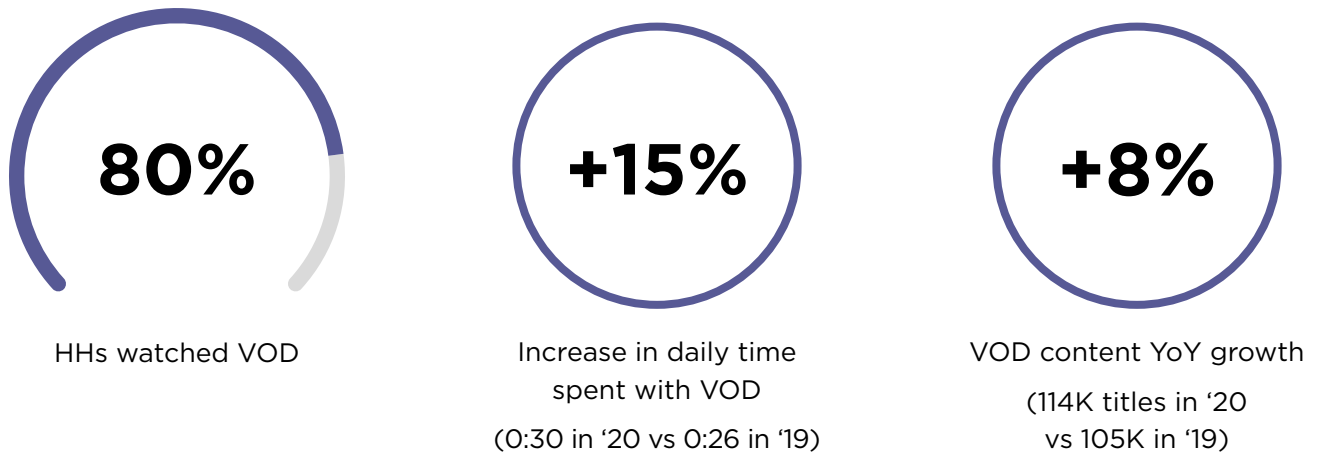


— Live — VOD / DVR

Comcast Aggregate Household Viewership Data. Share of hourly time spent with Live vs Time-shifted Viewing. Q2 2020. Weekday: Mon-Fri. Weekend: Sat-Sun.

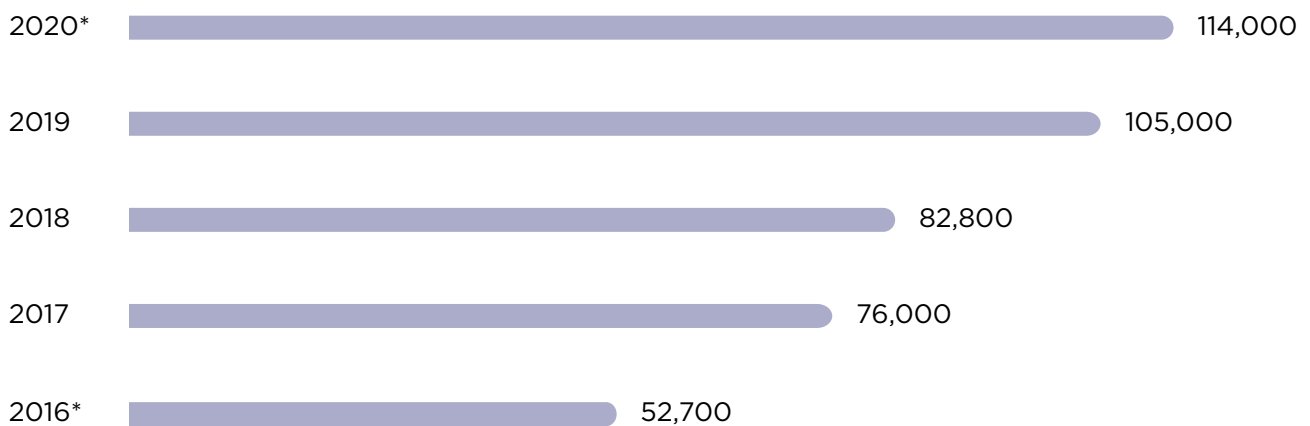
TIME WITH VIDEO ON DEMAND GROWS AS CONTENT IS ADDED

In Q2 2020, HHs watched VOD at a consistent rate to the previous quarter (80%), however VOD viewing was up +15% YoY. The increase in time spent was on par with the increase in number of VOD titles watched. The number of VOD content titles in Q2 2020 grew +8% YoY.



Comcast Aggregate Household Viewership data. Q2 2020 percentage of households that watched VOD.

Number of VOD Titles Watched Per Month



Comcast Aggregate Household Viewership Data. Average VOD titles watched monthly.
*2016 based on Oct-Dec & 2020 based on Jan-Jun.

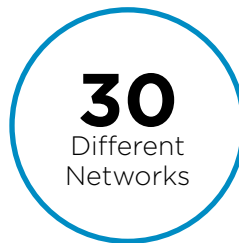


DIVERSE VIEWING PATTERNS



When looking at the networks with the most viewing per household, there were **304 different “most-watched” networks** across Comcast HHs during Q2 2020.

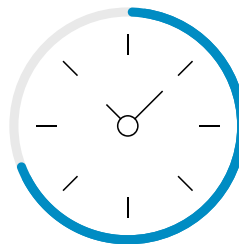
Comcast Aggregate Household Viewership Data. Q2 2020. Number of most watched networks across 17m households. Minimum of 1,000 households in threshold.



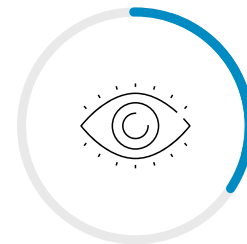
Choice and new ways to discover content means consumers continue to watch a diverse set of channels. Households watched an average of 30 different networks in Q2 2020.

Comcast Aggregate Household Viewership Data. Q1 and Q2 2020. Average number of networks viewed per month during the quarter.

ADDITIONAL FACTS



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



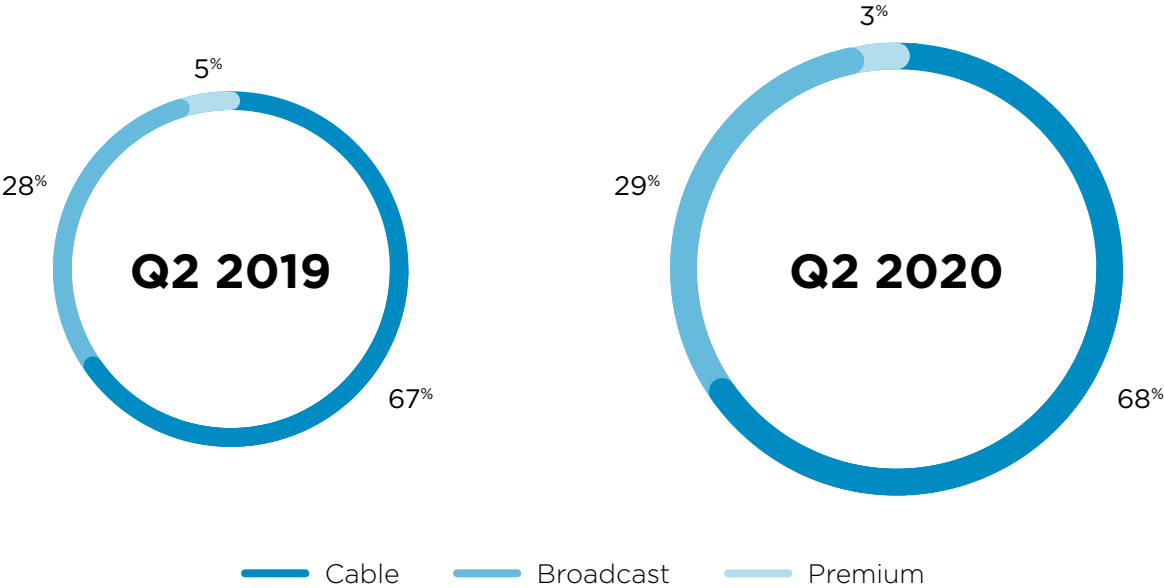

As all households watch differently, advertisers can't rely on the “most-watched” networks alone to achieve scale. The top 5 networks accounted for **33%** of all viewing in Q2 2020.**

*Comcast Aggregate Household Viewership Data. Q2 2020. Percentage of viewing occurring outside the house of 7p-11p. Average per quarter.

**Comcast Aggregate Household Viewership Data. Q2 2020. Percentage that top 5 viewed networks made up in terms of share of total viewing per quarter.

MAJORITY OF TIME SPENT WITH CABLE NETWORKS


In Q2 2020, the share of viewing cable networks remained largely consistent. Broadcast networks saw a slight increase in share and the lowest share for premium networks was recorded (based on eight quarters of measured data).

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

VIEWING SHARE QUARTER BY QUARTER

Cable TV viewing made up **68%** of viewing share in Q2 2020, up one percentage point over last year. Broadcast share has also seen a slight uptick since 2019, while premium network share fell two percentage points.



■ Cable
 ■ Broadcast
 ■ Premium

Comcast Aggregate Household Viewership Data. Q3 2018 - Q2 2020. Shift in share of viewing between cable, broadcast, and premium networks. Categories defined above.

Q2 2020 CABLE, BROADCAST & PREMIUM VIEWING SHARE: WEEKDAY VS. WEEKEND

When evaluating share of viewing for weekday (Mon-Fri) versus weekend (Sat-Sun), there is typically a small difference between the two. However, for Q2 2020, cable's share increased from 66% to 72% from weekday to weekend, while the inverse happened with broadcast, with its share decreasing from 30% during the week to 23% on weekends. This is most likely due to a decrease in sports programming.

Weekday



Weekend

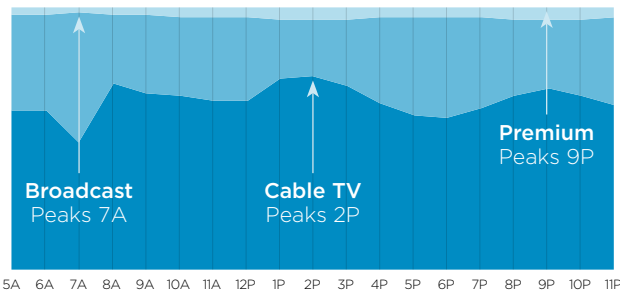


Comcast aggregate household viewership data. Share of daily time spent by network type. Q2 2020. Cable defined as all cable networks. Broadcast defined as all broadcast networks, including independent and Spanish language. Premium defined as HBO/Showtime, Starz, Cinemax.

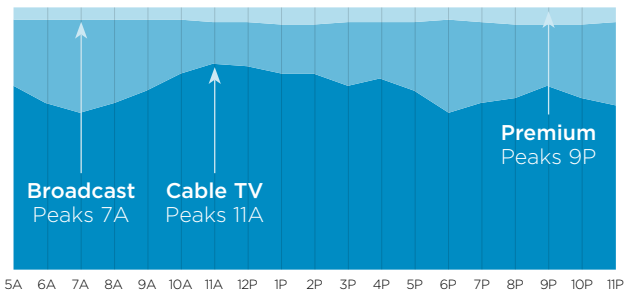
NETWORK SHARE SHIFTS: JAN-JUN 2020

The charts below show the hourly shift in share between cable TV, broadcast and premium networks respectively for first-half 2020. 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 somewhat constant, however peaked slightly in the overnight hours.

Weekday



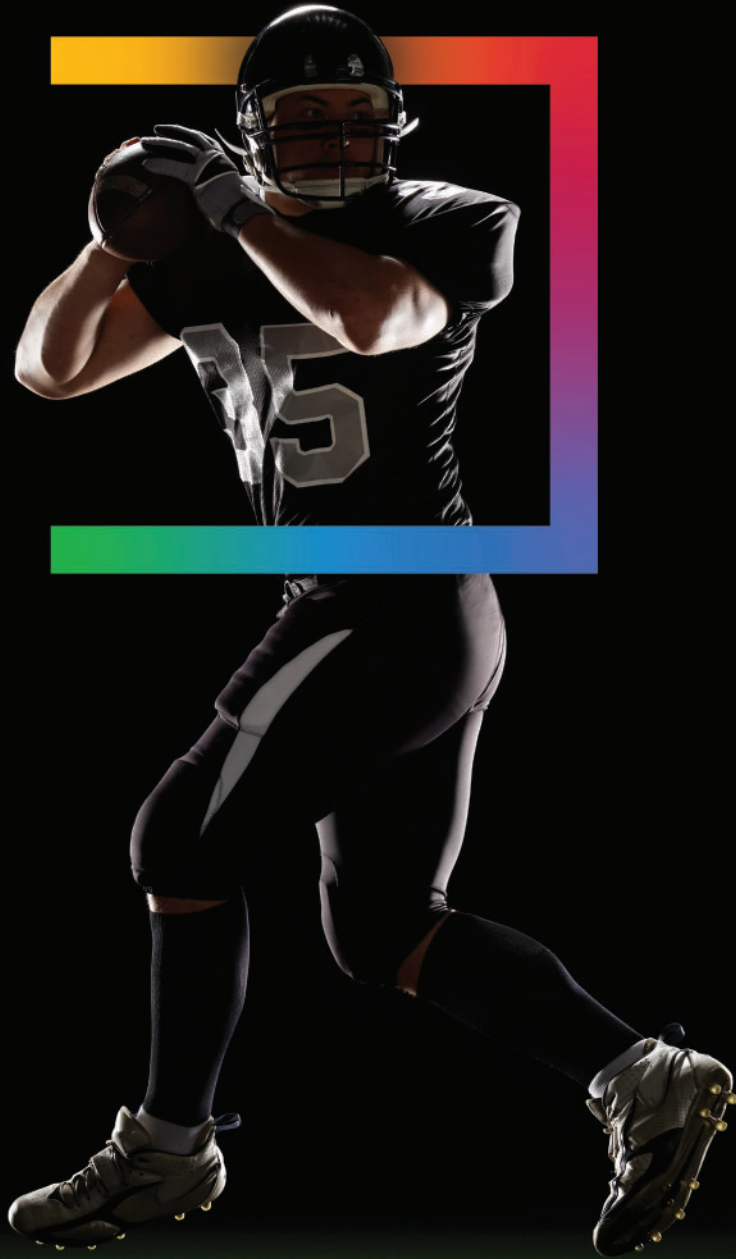
Weekend



— Cable — Broadcast — Premium

Comcast aggregate household viewership data. Hourly 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.

A RETURN TO SPORTS



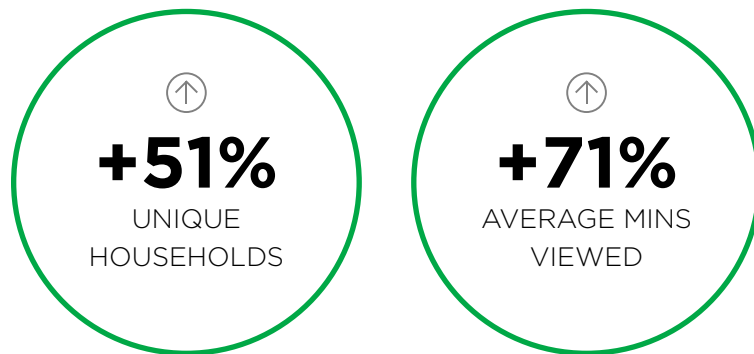
A MEASURED RETURN IN SUMMER 2020

The postponement of sports during the Coronavirus pandemic, as well as the unknown timeframe for the rebound of some leagues, has left fans and advertisers hungry for a full return. We know TV viewership is up 15 minutes per day in Q2 over the same time last year—so where are sports audiences spending their time?

To answer that question, Effectv took a look at Comcast's viewing data to understand where the sports fan (of a specific sport) have an affinity to another. Additionally, the return of sports in the U.S. drew a large increase in viewership, specifically for Major League Baseball (MLB), the National Hockey League (NHL) and the National Basketball Association (NBA).

While abbreviated seasons and playoffs for the MLB, NHL, and NBA are now underway, Effectv analyzed the viewership data of the respective leagues' delayed starts and restarts of their seasons versus the previous year.

VIEWERSHIP INCREASES FOR 2020 SEASON STARTS & RESTARTS VS. 2019 IN AGGREGATE FOR MLB, NHL & NBA



Comcast Internal Viewing Data. 2020 Season openers vs 2019 season openers. Minimum 5 minutes viewed.

Sports fans' pent up anticipation for games has led to strong increases in engagement when compared to 2019. Across nearly 2.5M Comcast HHs, Effectv saw 51% YoY growth for the three season starts and restarts. HH time spent with these three sports in late July has increased by 71%, showing much higher engagement than 2019.

For advertisers, the higher number of unique HHs and average minutes viewed translates to a larger potential ad-viewing audience for upcoming sports events.



ANALYZED DATA SET

The viewership data used to draw comparison between 2019 and 2020 season starts and restarts were averaged to determine the increases in viewership per game and the unique HHs that tuned in.

The data sets pulled:

MLB: the 15 season opening games aired March 28, 2019, compared to the 2 season opening games aired Jul 23, 2020.

NBA: the starting 29 games aired Nov 1-4, 2019, compared to the 19 first restart games aired Jul 30-Aug 2, 2020

NHL: the starting 28 games aired Nov 1-4, 2019, compared to the 10 first restart games aired Jul 30-Aug 2, 2020

THE EFFECTV SPORTS MATRIX: LOCATING SUPERFAN ADJACENCIES

Just because some sports are off the air, doesn't mean their fans stop watching TV—in fact, the aforementioned data shows quite the opposite. In the absence of games, Superfan Viewers tend to seek out other sports that are on air.

WHAT IS THE EFFECTV SPORTS MATRIX?

Advertisers can use the Effectv Sports Matrix to find adjacencies for their audiences to reach them successfully.

The matrix shows that sports fans across the board have diverse interests and an appetite for other types of sports, shifting what they view in the absence of their favorite sport or the desire to watch even more. The matrix uses index rankings based on the ten sports programs with the highest viewership across all cable and broadcast networks.

HOW TO READ:

Each table illustrates the primary sport of the Superfan Viewer and the other sports they are most likely to watch.

For example, the MLB Superfan Viewer (table 3) is more likely to also watch NHL, golf and NCAA Basketball.



WHO IS THE SUPERFAN VIEWER?

In the Effectv Sports Matrix, the sports superfan is a HH who's viewership for a specific sport is in the top third percentile of sports viewing from 2019 viewership data.

Comcast Internal Viewing Data. Full Year 2019. Index of heavy sports viewers watching each of their respective sports.

*Effectv Sports Metric program titles sources: NASCAR: NASCAR Xfinity Racing Series, NASCAR Monster Energy Series. Tennis: Australian Open Tennis, French Open Tennis, Wimbledon Championships, U.S. Open Tennis. FBS: CFP National Championship, College Football. Golf: U.S. Open Golf Championship, PGA Tour Champions Golf, PGA Tour Golf. MLB: MLB Baseball. NBA: NBA Finals, NBA Basketball. NCAA: NCAA Basketball Tournament. NFL: NFL Football. NHL: NHL Hockey, NHL Playoffs. Soccer: Futbol Premier League, Futbol UEFA Champions League, Futbol Mexicano Primera Division, Premier League Soccer, MLS Soccer, Bundesliga Soccer, UEFA Champions League Soccer.

NCAA FOOTBALL

NCAA BASKETBALL	180
GOLF	171
NFL	156
MLB	156
TENNIS	147
NBA	145
NHL	135
NASCAR	132
SOCCER	93

GOLF

TENNIS	178
NCAA BASKETBALL	164
NCAA FOOTBALL	160
NHL	157
MLB	154
NFL	131
NASCAR	127
NBA	114
SOCCER	97

MLB

NHL	185
GOLF	161
NCAA BASKETBALL	158
NCAA FOOTBALL	154
NBA	148
NFL	142
TENNIS	139
NASCAR	116
SOCCER	101

NASCAR

NHL	133
GOLF	127
SOCCER	125
NCAA FOOTBALL	125
MLB	121
NFL	113
NCAA BASKETBALL	111
TENNIS	104
NBA	89

NBA

NCAA BASKETBALL	168
NCAA FOOTBALL	151
TENNIS	150
MLB	150
NFL	146
NHL	130
GOLF	127
SOCCER	121
NASCAR	76

NCAA BASKETBALL

NCAA FOOTBALL	201
NBA	193
GOLF	186
TENNIS	172
MLB	171
NFL	149
NHL	147
NASCAR	108
SOCCER	104

NFL

NCAA FOOTBALL	165
MLB	153
NBA	152
NCAA BASKETBALL	151
NHL	150
GOLF	147
TENNIS	128
NASCAR	124
SOCCER	90

NHL

MLB	174
GOLF	155
NCAA BASKETBALL	138
NFL	137
NCAA FOOTBALL	133
SOCCER	125
NASCAR	125
TENNIS	124
NBA	123

SOCCER

NHL	151
NBA	150
TENNIS	147
MLB	146
NCAA FOOTBALL	137
NCAA BASKETBALL	135
GOLF	126
NASCAR	124
NFL	120

TENNIS

GOLF	200
NBA	186
NCAA BASKETBALL	182
NCAA FOOTBALL	170
MLB	154
SOCCER	150
NHL	141
NFL	138
NASCAR	88

Comcast Internal Viewing Data. Full Year 2019. Index of heavy sports viewers watching each of their respective sports.

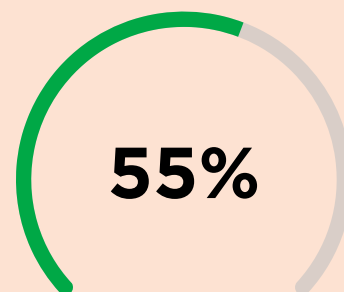
DIVERSITY IN SPORTS FAN CONSUMPTION

While the Effectv Sports Matrix shows that fans have diverse interests and an appetite for other types of sports, we also know that they enjoy more than just a similar sport. 55% of heavy sports viewers are heavy viewers of 3 or more sports.

College football fans, perhaps unsurprisingly, gravitate towards NFL games, but they also enjoy golf, college basketball and MLB too.

In Comcast HHs, 27% of Superfan Viewers only generally viewed one sport and only 1% of the viewer base are considered Superfan Viewers in all 10 sports listed in the matrix.

Comcast Internal Viewing Data. Full Year 2019.
Number of sports watched among heavy sports viewer tercile.



55%
OF HEAVY
SPORTS VIEWERS ARE
HEAVY VIEWERS OF
3 OR MORE SPORTS



Q2 2020 WRAP UP

The robust return of sports is a positive moment in this challenging year for consumers and advertisers alike. Both groups have been starved of the opportunity to align with teams and sports that they connect with.

For advertisers, adjusting to new dynamics in the first half of this year, lessons have been learned. TV viewership was boosted by more time at home but also shifted in terms of tune in and on demand. TV investment strategies only focused on content alignment became limited in terms of reaching fragmented audiences.

A data-led approach to finding audiences regardless of where they are consuming content is critical, and staying on-air despite the environmental headwinds, has proved to be beneficial both in the short- and long-term.

As more sports and tent-pole event programming return to the airwaves, including the political season heating up in the Fall, TV remains the critical vehicle to drive awareness, foster prospects and drive action at scale.

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.

