



THE
[TV]
VIEWERSHIP
REPORT

MULTISCREEN AUDIENCE INSIGHTS FOR CAMPAIGN SUCCESS
2H 2022



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About the Data

Data insights increasingly fuel 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 data set used for this report is comprehensive, independently aggregated viewership data collected from more than 29 million households (HHs), whose members watched nearly 14 billion hours of TV. Additionally, ad exposure data from 37,000 multiscreen campaigns garnering over 3 billion impressions is included in this report.

Introduction

Convergence and Consumer Choice Reach Tipping Point

The latest edition of [The TV Viewership Report](#) is here, featuring second-half 2022 data and analysis of the multiscreen TV landscape. This benchmarking report shows that amid transformative industry progress and myriad video ecosystem endpoints, multiscreen delivery remains the best way to reach audiences.

Consumers continue to adapt along with a changing and fragmented ecosystem. An analysis of multiscreen campaigns revealed viewers were reached via more than 4,000 different content endpoints,* from traditional TV sources, streaming platforms, Smart TV apps, mobile apps, and many more. Despite the plethora of choice, the foundation of it all remains the big screen home television. The convergence of traditional and streaming inventory has created a new tipping point for advertisers as they look to find the sweet spot to maximize audience reach. This report will illustrate that a consistent ratio is emerging.

Further analysis shows that a multiscreen approach is the key to reaching the largest, most receptive audience available to marketers. The additional pathways to viewers provide productive reach opportunities, particularly for those lighter TV viewing HHs. Streaming is an important resource to reach these viewers, bolstering its role as an incremental reach model with viewers overall. To achieve this, marketers must partner with companies that can provide aggregated impressions at scale.

[Free ad-supported streaming TV \(FAST\)](#) channels are also an increasingly impactful platform, particularly among certain demographic cohorts like young and multicultural families, rural homeowners and more. FAST and advertisement-based video on demand (AVOD) are similar, but each have their own individual appeal with viewers. Programming genres play a big role in what drives viewership to these services as they continue to become part of the mainstream.

Continue reading to discover video consumers' viewership behavior across screens and strategies you can use to maximize your campaigns today.

*Endpoints are unique publisher and device viewership combinations.

2H 2022 Key Findings

1

Traditional TV is vital for ad campaigns

78% of multiscreen advertising campaign reach came from traditional TV.

2

Growth in streaming provides incremental reach

55% of HHs reached through [streaming](#) were incremental to campaigns.

3

Streaming helps with hard-to-reach HHs

The tactic is 4x more likely to reach light- and no-TV viewing HHs.

4

Content choices vary between AVOD & FAST

Viewers choose FAST for content genres like news and education while viewers opt to watch drama and reality on AVOD platforms.

5

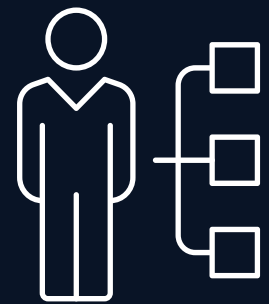
Streaming allocation maximizes reach

Advertisers should consider adjusting investment within a range of 20-30% streaming allocation based on the audience they are trying to reach.



Multiscreen Campaigns Reach Audiences Where They Watch

Consumer & Advertiser Choice



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

Diversity of Viewing



2,000+ publishers including **170** cable TV networks

Content Viewed on The Big Screen



78% of Effectv Streaming** happens on the TV screen

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

*Endpoints are unique publisher and device viewership combinations.

**Effectv Streaming is Effectv's 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. Effectv Streaming includes viewing from Xfinity on Demand.

Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + Effectv Streaming campaigns (2H '22). Endpoints with at least 100 impressions included in analysis.

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The Latest In: Traditional TV Viewership

Households spend nearly 6 hours per day watching traditional TV

BREAKDOWN OF TRADITIONAL TV

90% Of Viewing is Live

72% Outside of Prime

2H 2022

5:58
Spent per day*

30 Networks Avg Per HH

68% On Cable



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

Sourcing: Comcast Aggregated Viewership Data (2H '22).

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! Traditional TV remains strong. A data-driven approach reaches desired audiences throughout the day across many networks.

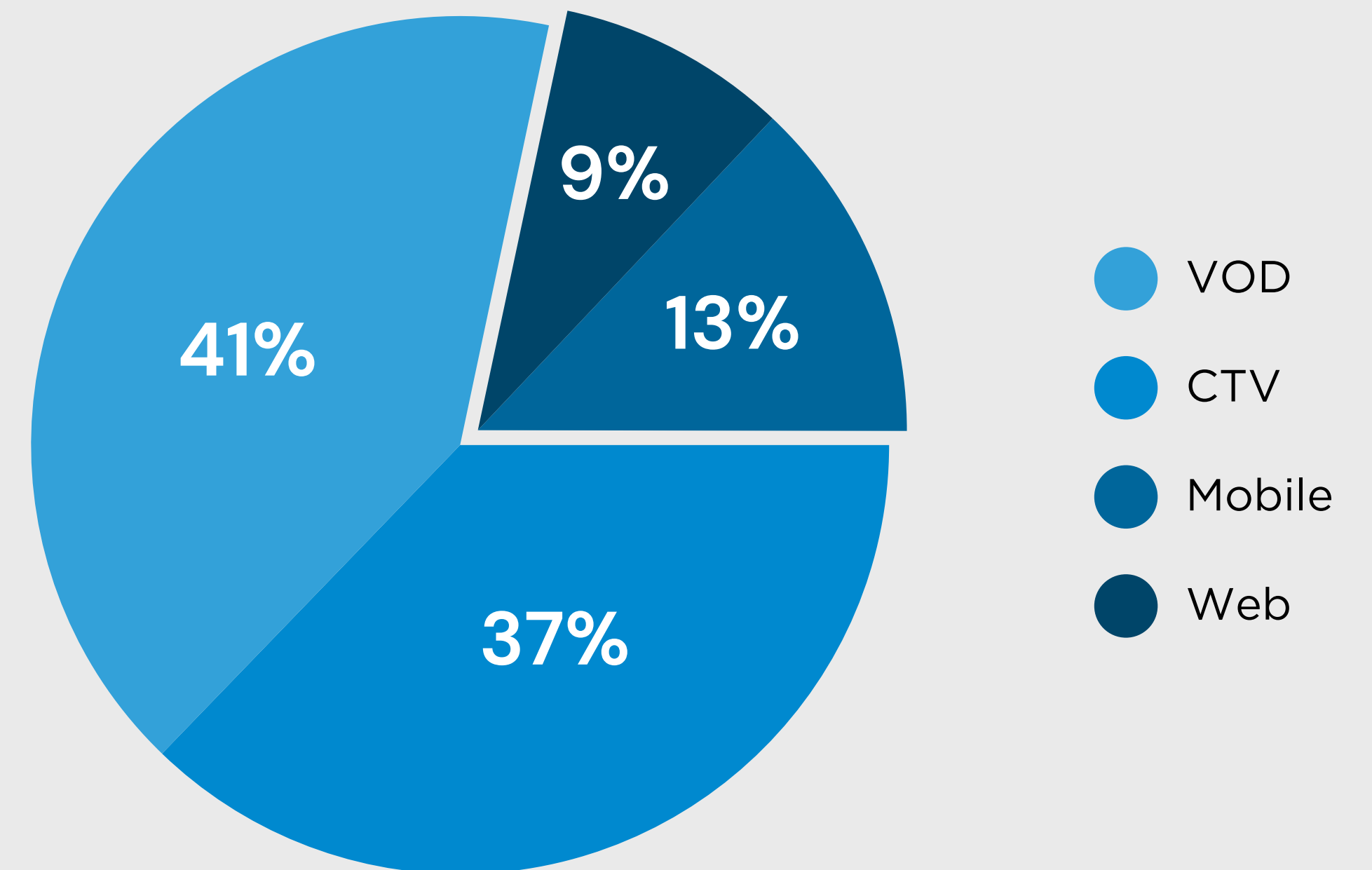
The Latest In: Streaming TV Viewership

The majority of streaming happens on the big screen

BREAKDOWN OF STREAMING USAGE

78% of streaming happens on the TV screen

STREAMING CONSISTS OF IMPRESSIONS VIEWED VIA:



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*Video on Demand (VOD) in this context is Xfinity on Demand served via an Xfinity set-top box.

Sourcing: Comcast Analysis of Effectv Streaming campaigns (2H '22).

Streaming is a “big screen” experience. When it comes to all the devices consumers have available to watch great 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 the Majority of Campaign Reach

78% of multiscreen campaign reach is unique to traditional TV

78% 10% 12%

● TV Only ● TV & Streaming ● Streaming Only

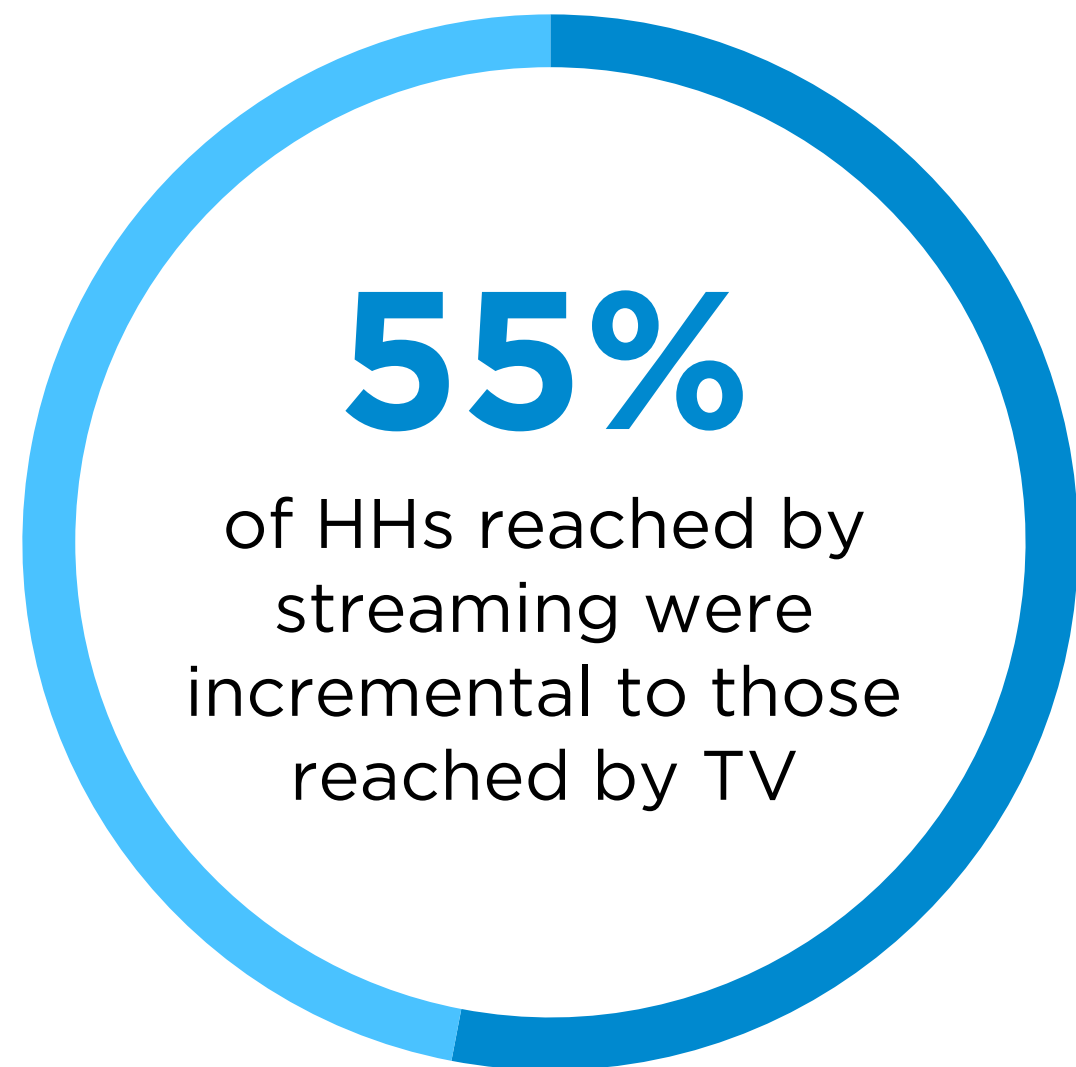
! **For advertisers, a streaming-only approach misses the scale that traditional TV provides.**

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Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + Effectv Streaming campaigns (2H '22).

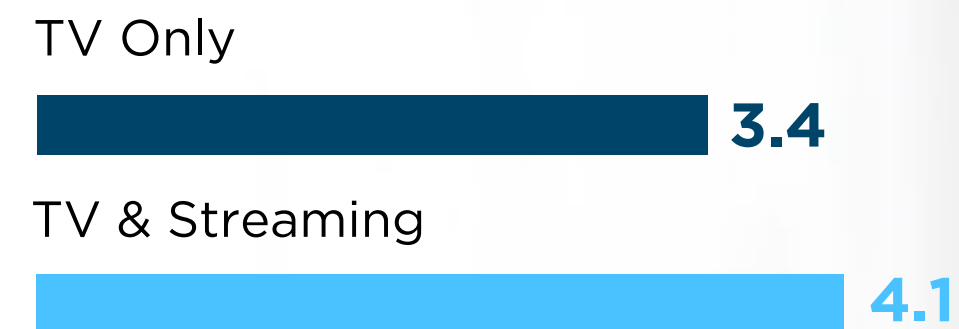
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Streaming Adds Incremental Reach & Frequency



+20% Those reached by TV & streaming had 20% higher frequency than TV alone

Average Frequency Before & After Adding Streaming



! Think of streaming as a tactic that can be used to gain incremental reach beyond a traditional TV campaign strategy.

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Note: Of the HHs reached only through streaming or a combination of streaming plus traditional TV (22% as indicated on the previous page), 55% of streaming reach is incremental.

Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + Effectv Streaming campaigns (2H '22).

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Streaming Delivers Hard-to-Reach Households

MORE IMPRESSIONS

4x Streaming impressions were 4x more likely to be seen within light and no-TV viewing HHs*

Impressions to Light and No-TV Viewing HHs



! Streaming helps reach light and no-TV viewing HHs.

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*Light and no-TV viewing HHs are defined as those with no TV service or TV viewing from 2H '22. 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.

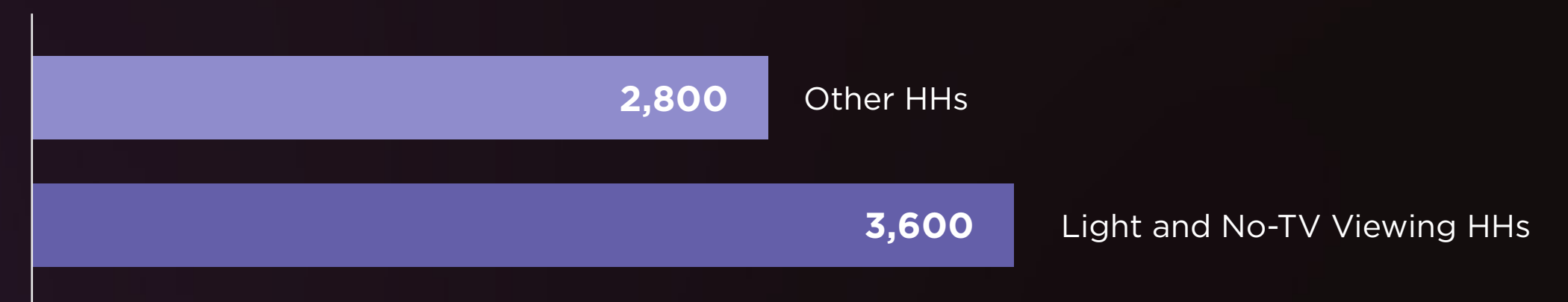
Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + Effectv Streaming campaigns (2H '22).

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MORE ENDPOINTS

+28% more endpoints reached for light and no-TV viewing HHs

Number of Endpoints



! Streaming impressions may be more likely to be seen in light and no-TV viewing HHs because they consume in more diverse ways.

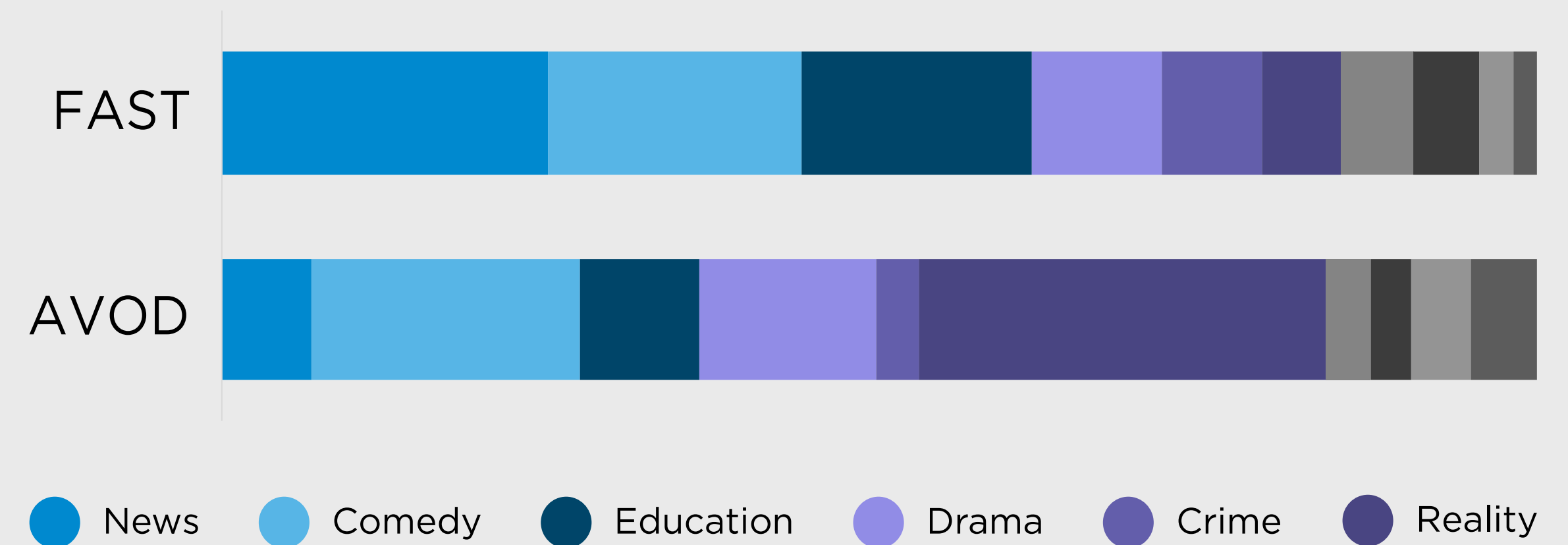
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FAST & AVOD Viewing Differs by Content Type

BREAKDOWN OF FAST & AVOD

Content genre consumption shifts when looking at viewing patterns across AVOD and FAST platforms. While there are similarities in overall usage for both ad-supported platforms, FAST provides guided, channel-driven programming, while AVOD delivers a content hunter's experience. Comedy is popular on both platforms; however, **news and education are more likely to be viewed on FAST** channels whereas **reality and drama are more likely to be consumed by audiences in an AVOD** environment.

It makes intuitive sense that news programming makes up such a large portion of FAST channel viewership. Its linear-like environment is akin to how audiences are accustomed to viewing news in a traditional TV environment.



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*FAST - Free ad-supported streaming TV. AVOD - Ad-supported video on demand. Includes aggregated ad exposure data from multiple FAST & AVOD services.

Sourcing: Comcast Aggregated Ad Exposure Data in Effectv Streaming campaigns (2H '22).

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It's important to utilize a data-driven schedule reaching audiences across the content they are viewing—whatever the platform.

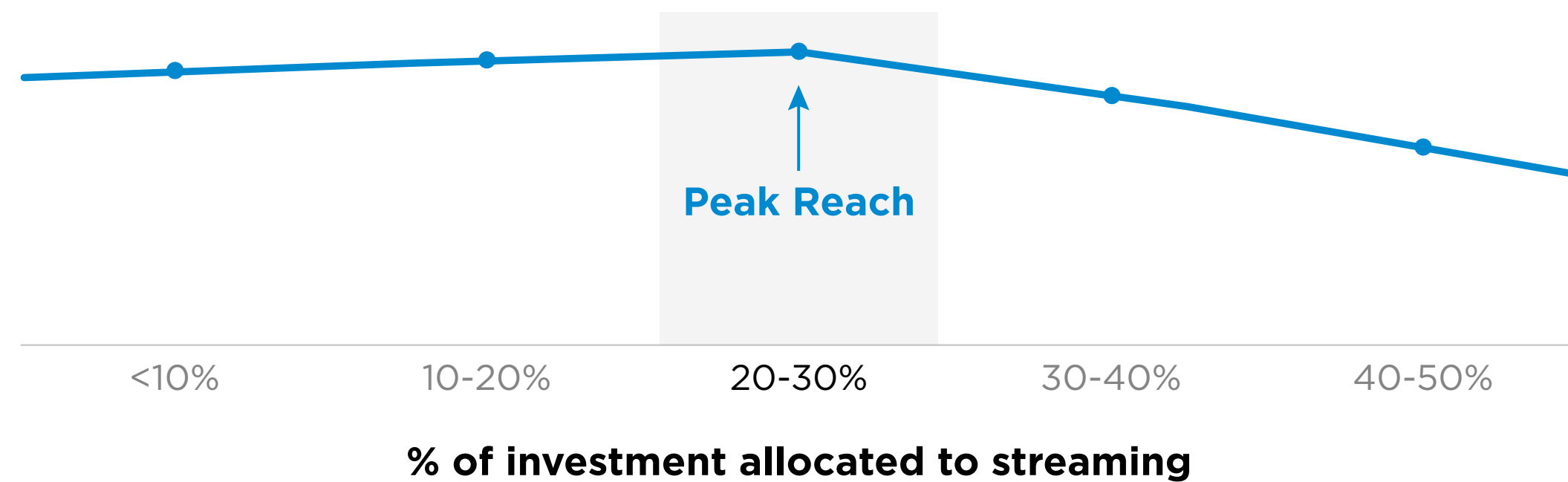
Multiscreen Recommendation

Effectv's ongoing analysis of nearly 100,000 multiscreen campaigns since 2021 has continued to support the finding that reach peaks when 20 - 30% of investment is in streaming. As new data becomes available, it will be analyzed and re-evaluated to find the investment "sweet spot" for streaming within multiscreen campaigns.

20-30%

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

Multiscreen reach is dependent on investment allocation.



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Sourcing: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + Effectv Streaming campaigns (2H '22).

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



Effectv is an audience delivery company. Effectv uses 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. A division of Comcast, Effectv 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.effectv.com/insights.

Authors



Annie Hagerty

Sr. Insights Analyst, 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

In this role, he leads content strategy for the organization and creates/distributes insights, perspectives, and new research. Lee also manages the Comcast Advertising Agency Leadership Council aimed at deepening relationships with buy-side clients and advocating for industry advancement.



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

Manager of Audience Insights, Comcast Advertising

In this role, she explores large scale datasets to help advertisers understand how to maximize their video investment in the ever-changing advertising landscape. Recognizing the breadth of advertisers Effectv serves, Andrea provides audience-based buying strategies with an emphasis on automotive and political.

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

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