

Q1 2019

— THE —
[TV]
VIEWERSHIP
REPORT



COMCAST
SPOTLIGHT®

THE STATE OF VIEWERSHIP

TV is in its heyday. We are now living in an era of abundance in terms of content, distribution and access. From a marketer's perspective, making the right investment decisions in pursuit of finding audiences is challenging, but there is scale and efficiency if you look in the right places.

We are excited to present our inaugural edition of The TV Viewership Report, which details the ways in which the modern viewer is consuming content in a world of almost limitless choice.

Some great examples of our findings:

Cable TV accounts for nearly two thirds of share when compared to broadcast and premium networks.¹ That share has remained consistent since Q2 2017. Both live and time-shifted viewing were at a two-year high in Q1 2019. The growth in time-shifted viewing is driven largely by video on demand (VOD). Comcast households are watching over 100,000 VOD titles each month, up from 52,000 in 2016.

We will be releasing this report with updated data and trends on a quarterly basis to help inform how you plan and buy your media across platforms. This quarter, pay close attention to:

- Network share changes and number of networks viewed (page 7)
- Hourly Share (page 10)
- Daily time spent with TV (page 11)



Regards,

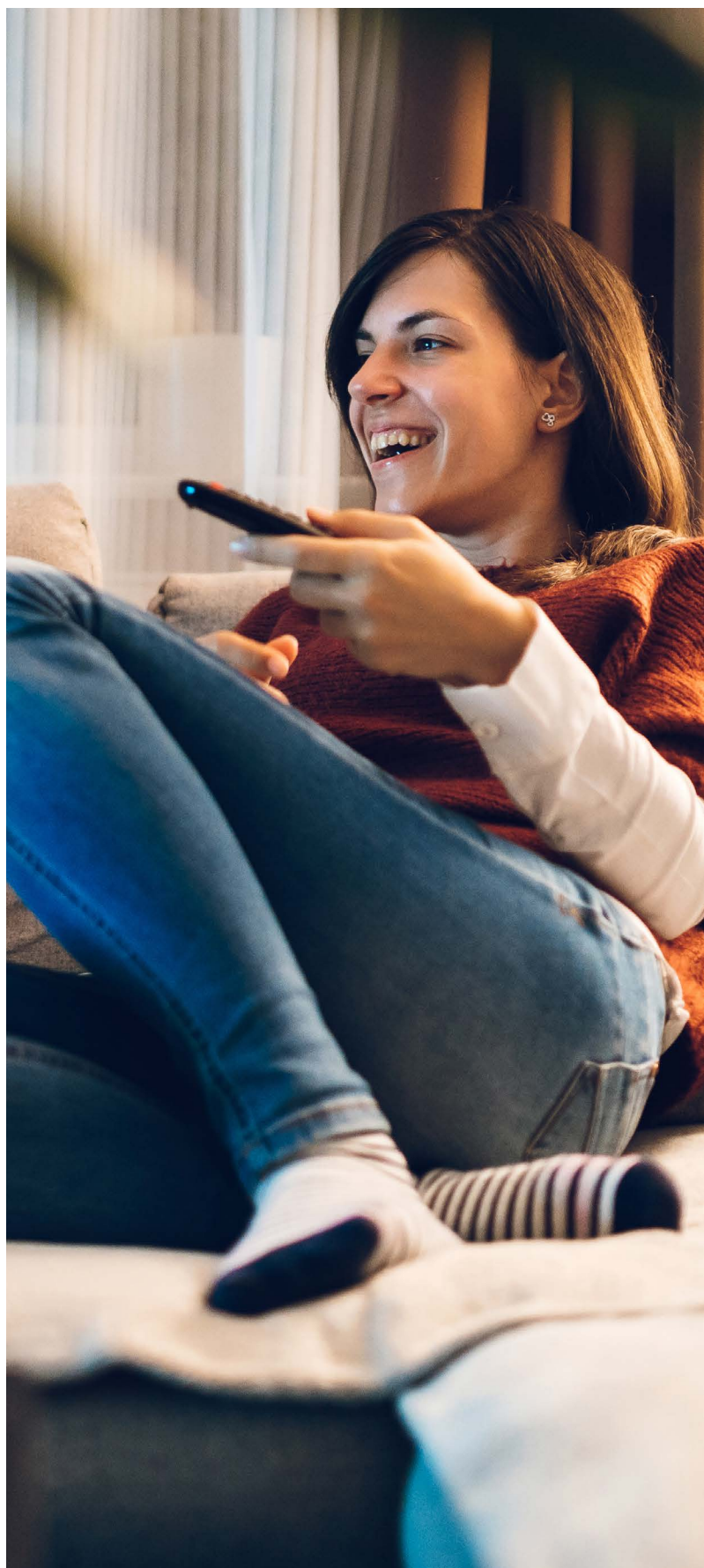
Andrea Zapata

VP, Research & Insights, Comcast Spotlight

1: Comcast Internal Viewership Data. Share of daily time spent by network type. Q1 2019. Cable defined as all cable networks. Broadcast defined as all broadcast networks, including independent and Spanish language. Premium defined as HBO/Showtime, Starz, Cinemax

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A NEW REPORT FOR MARKETERS

The TV Viewership Report takes a look at the current position of TV viewing across the Comcast footprint.

This new report is intended to inform and educate marketers who want to make the most of their ad buying strategy by better understanding the nuances of television viewing.

The viewership insights included in this report come from over 17 million Comcast households (HHs) across 65 markets. They are based on approximately nine billion hours of viewing data captured in Q1 2019. To put that number in perspective, it would take over 100,000 years to watch one billion hours of content.

Comcast has been able to—in a privacy-friendly way—attach hundreds of audience segments to this viewing information. The scale of this vast data set is substantial and allows marketers to get a more granular look at consumer viewing. This is true especially at the local market level. Previously there would be sample concerns when looking at the viewing of those in-market for a new mid-size car in the Pittsburgh market, which were insights based on under 40 people. Now, using Comcast viewership information, those insights are based on over 61,000 households.

Marketers can move beyond broad targets like age/gender and focus on their actual customers. Comcast Spotlight is able to help inform clients how to find their customers through a combination of data, analytics and proprietary solutions. The foundational big picture included in this report is the first step in helping marketers achieve their advertising goals.

PANEL VS. ACTUAL VIEWERS



Total U.S.:

Panel: 200,000
HHs: 17,000,000

Local Market: Pittsburgh

Panel: 2,500
HHs: 390,000

Target in Local Market: Pittsburgh In-Market for Mid-Size Car

Panel: 35
HHs: 61,000

Q1 2019 KEY TAKEAWAYS

- 01 TV has undergone such transformation** over the past decade that a new name is needed to fully represent this evolved medium: “The New TV”
- 02 Households watch a lot of networks**, not just a select few. Each household is different and there are over 300 most-watched networks
- 03 Q1 2019 saw a two-year high of TV viewing** across both live and time-shifted content
- 04 VOD consumption in Comcast households has doubled** since 2016 and continues to increase year over year



THE NEW TV

Comcast Spotlight's ability to use insights from viewership data has enhanced the capabilities of television advertising. Now, television campaigns are data-driven and identify audiences that truly matter to marketers.

Data, along with the evolution of content types and programming options, has created opportunities for marketers to use an audience-based, data-driven approach to their campaigns. These factors have contributed to television's evolution, creating a powerful new medium for marketers to extend the reach of campaigns to their audiences at scale. With the introduction of data, targeting and measurement, TV is now a full-funnel solution for marketers. Click below to learn more about "The New TV."

With this report, Comcast Spotlight presents a closer look at the viewing patterns of Comcast's 17 million households. Take a deep-dive into insights that explore the aggregation of market-level household viewing patterns from Tupelo, MS to Chicago, IL and everywhere in between.



FAST FACT

Progressive advertisers who are using data-driven strategies are discovering new learnings and letting go of long-held beliefs about TV. Learn how to drive results on The New TV.

Visit ComcastSpotlight.com/NewTV today.

NO TWO HOUSEHOLDS VIEW CONTENT THE SAME

Networks cater to different audiences, and audiences have the flexibility to choose which ones they watch and for how long. The barometer for measuring the most-viewed “top networks” in this guide is a minimum of 5 hours per quarter.



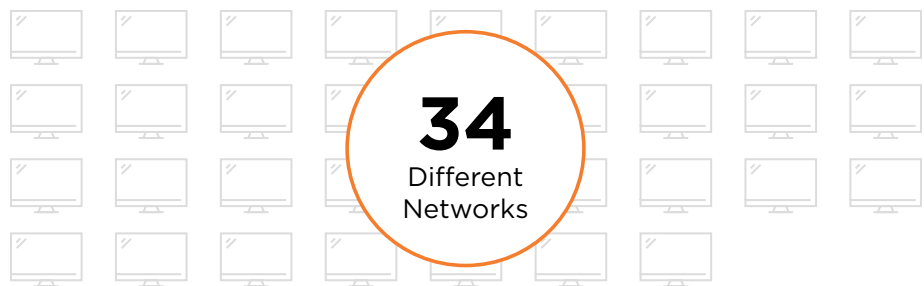
When looking at the network with the most viewing per household, there were more than **300 different “most watched” networks** across Comcast HHs during Q1 2019.

Comcast internal viewership data. Count of most watched networks by household. Minimum 5 hour qualifier per month. Q1 2019.

HOUSEHOLDS ARE WATCHING A DIVERSE SET OF NETWORKS

The evolution of television opens up new access points and a multitude of networks available for viewers.

Consumers continue to watch a diverse set of channels, not just a handful. 34 is the average number of networks viewed in Q1 2019. This time last year, this number was 35, so viewership is holding steady, which is good news for marketers looking to reach audiences at scale.



Comcast internal viewership data. Average number of networks watched by household. Minimum 5 minute qualifier. Q1 2019.

ADDITIONAL FACTS



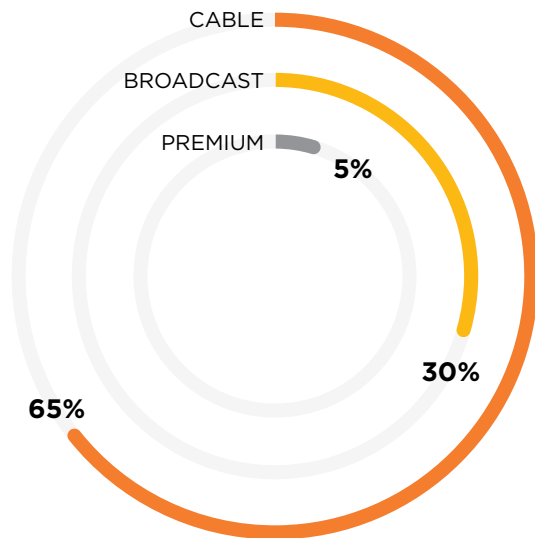
68% of time spent with linear TV is spent outside of primetime



Top 5 reaching networks account for **30%** of all viewing

Comcast internal viewership data. Q1 2019. Primetime defined as 7p-11p.

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) including independent broadcast networks and Spanish-language broadcast



Premium

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

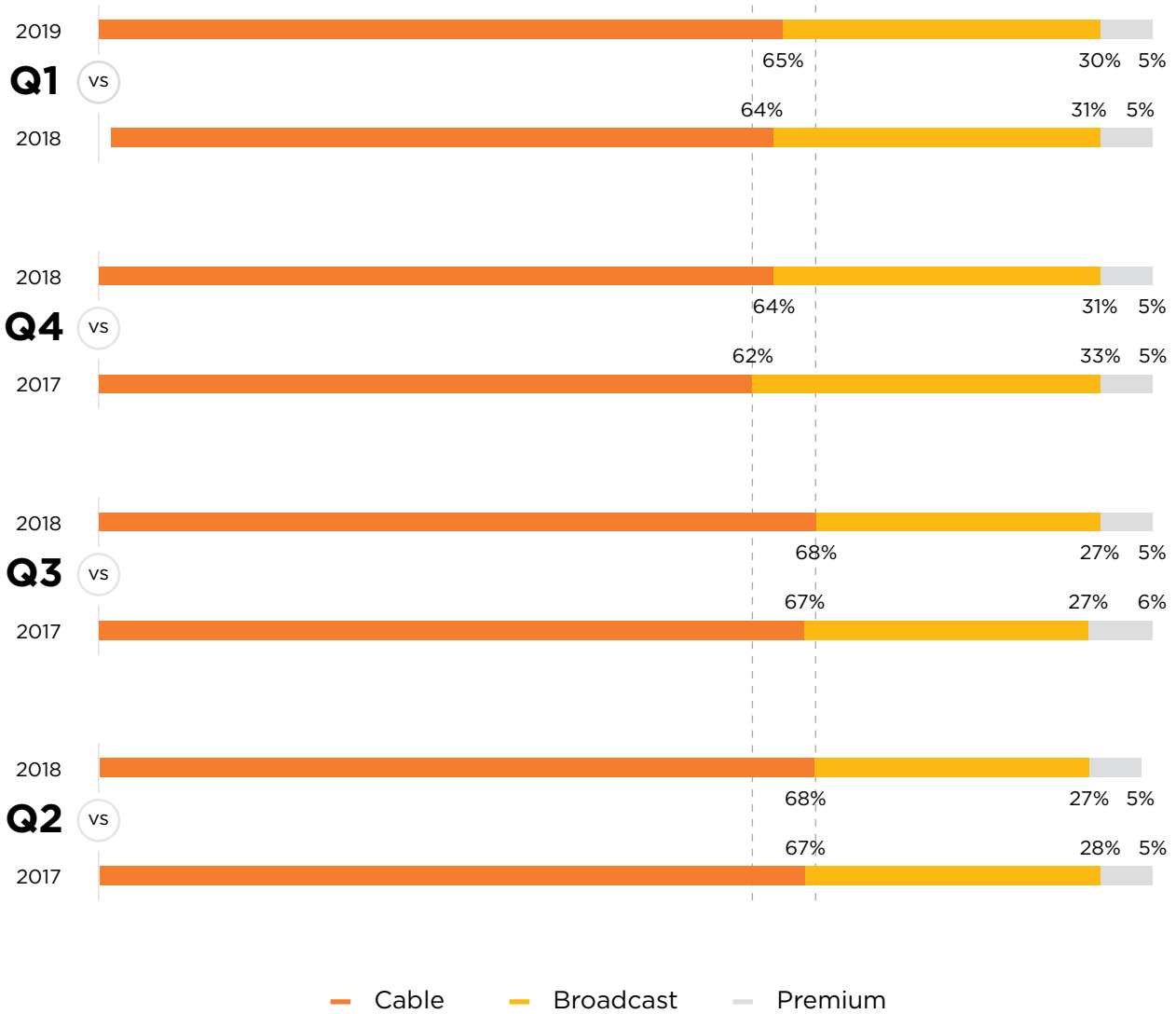
Comcast viewership data. Share of daily time spent by network type. Q1 2019.

Cable accounts for nearly two thirds of all viewing, with broadcast networks making up 30% and premium channels making up the remaining 5%.



SHARE REMAINS CONSTANT QUARTER BY QUARTER

Cable TV viewing made up 65% of share in Q1 2019, up one percentage point over the same time last year. Broadcast and premium network share remained nearly the same.

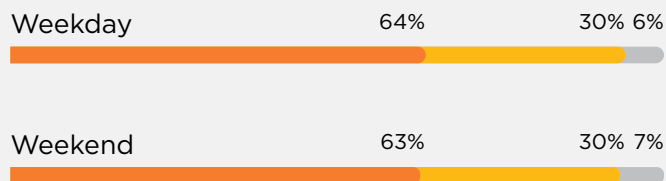


Comcast viewership data. Share of daily time spent by network type.

Time period as indicated. Cable defined as all cable networks. Broadcast defined as all broadcast networks, including independent and Spanish language. Premium defined as HBO/Showtime, Starz, Cinemax.

VIEWING SHARE REMAINS CONSTANT THROUGHOUT THE WEEK

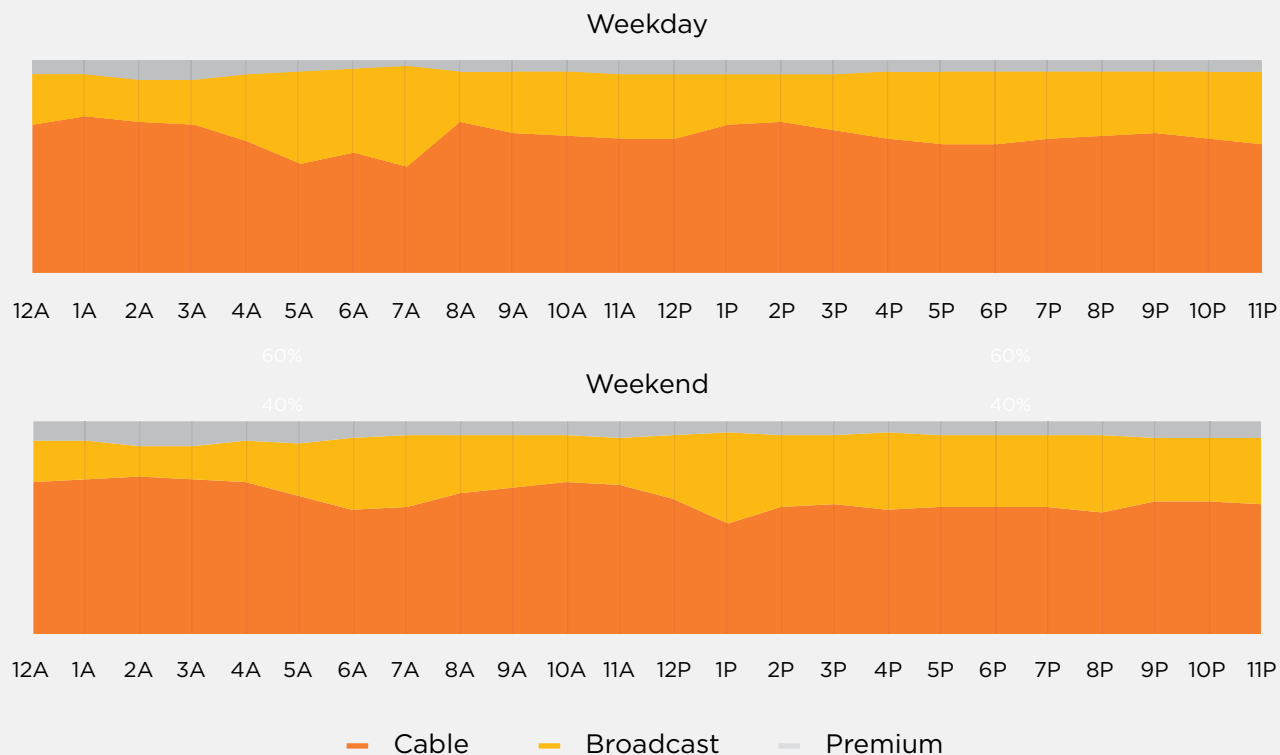
Viewing share remains constant regardless of day of week. Cable largely retains its share of weekday viewership (Mon-Fri) into the weekend (Sat-Sun).



Comcast internal viewership data. Q1 2019. Share of time spent by network type across weekday (M-F) and weekend (Sa-Su)

CABLE MAINTAINS THE MAJORITY OF SHARE DURING THE DAY

When you take a look at the hour-by-hour share, audiences are spending time with their familiar broadcast morning news, however cable still maintains the majority of share during the day and into the evening programming hours.



Comcast internal viewership data. Q1 2019. Change in hourly share of time spent by network type.

VIEWING IS AT A TWO-YEAR HIGH

ACROSS 17M COMCAST HHs, THERE WAS AN AVERAGE OF 6 HOURS 25 MINUTES OF DAILY TV VIEWING

Looking at the share between live and VOD/DVR, live TV consumption accounts for 86% of all viewing.



Comcast viewership data. Share of daily time spent with Live vs Time-shifted Viewing. Q1 2019.

Q1 2019 VIEWING UP 6% (21 MIN) OVER Q1 2018

Not only was there an increase in daily viewing in the first quarter of 2019 versus 2018, but Q1 2019 registered as the highest daily time spent with television over the last two years.

This is especially important as it reverses a trend of decreased year-on-year viewership in 2018.

Comcast viewership data. Daily time spent with Live vs Time-shifted Viewing. Time period as indicated.

Q1 2019 | 6:25 TOTAL HOURS

Live TV-5:32 VOD/DVR-0:53



Q1 2018 | 6:04 TOTAL HOURS

Live TV-5:19 VOD/DVR-0:45

2018 4:56 0:43

Q4 2017 5:06 0:41

2018 4:40 0:38

Q3 2017 4:58 0:41

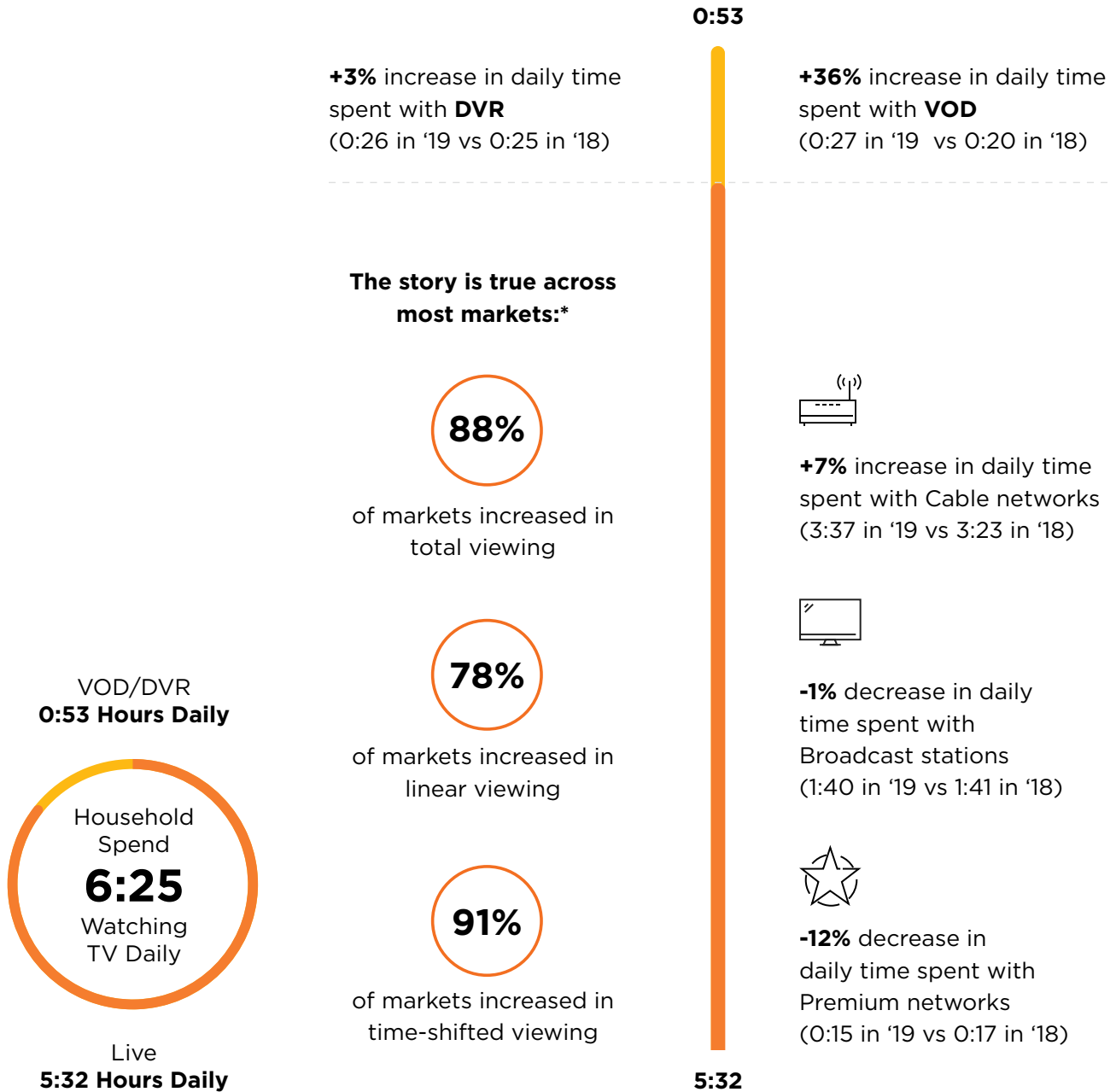
2018 4:53 0:41

Q2 2017 4:54 0:42



DISSECTING THE Q1 2019 INCREASE

Cable and VOD are primarily responsible for driving the 6% uptick in viewership.

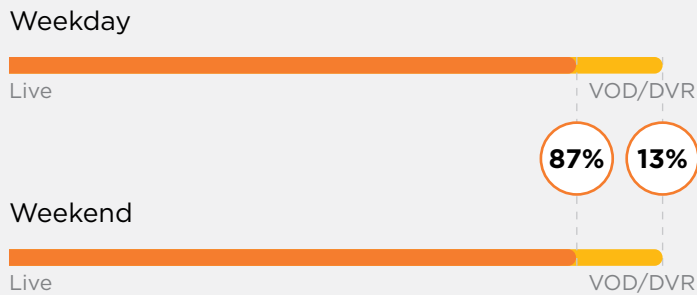


Comcast viewership data. Daily time spent with Live vs Time-shifted Viewing. Time period as indicated.

Markets are defined as the aggregation of households within geographical areas that are served by Comcast. The total number of measured Comcast Markets is 65 (see data tables at the end of the report for more details).

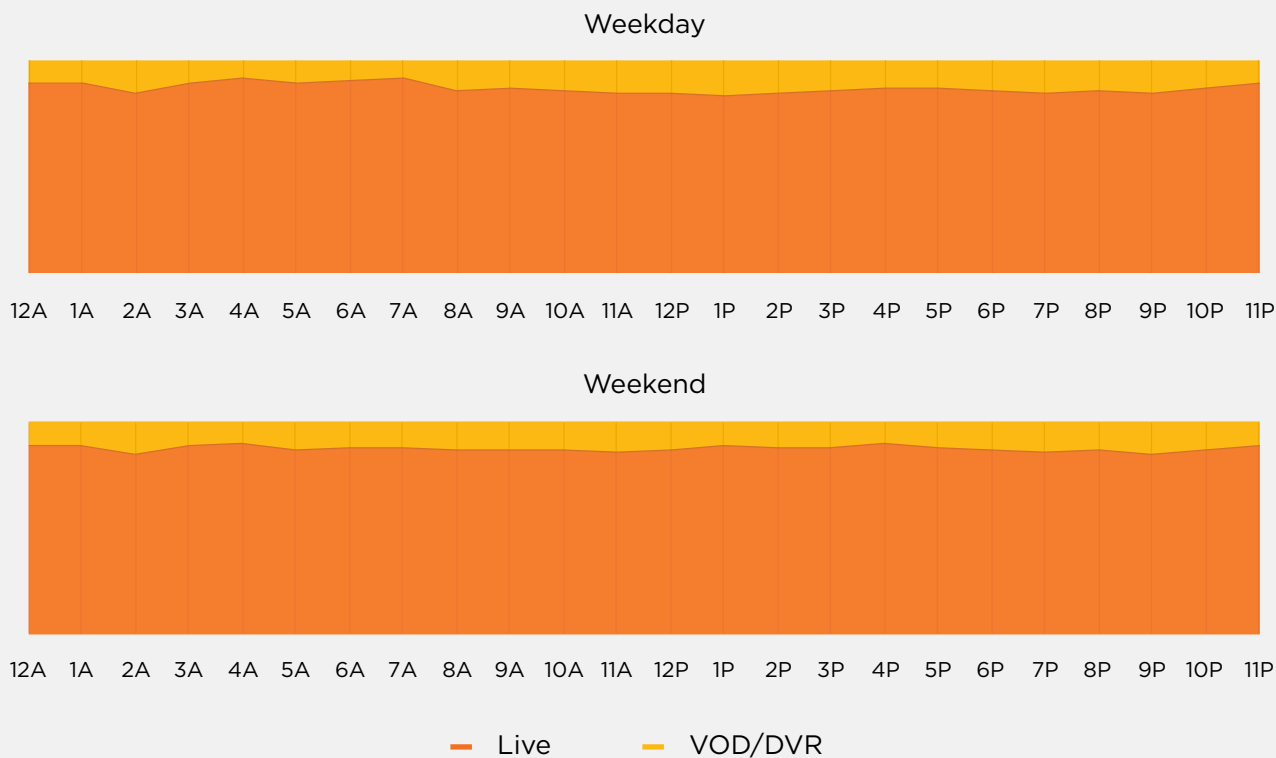
NO DIFFERENCE IN TIME-SHIFTED SHARE ON WEEKDAYS VS. WEEKENDS

Share of live and time-shifted viewing remained constant throughout the week. Even on weekends, viewers spent the majority of their time viewing live TV.



Comcast internal viewership data. Q1 2019. Share of time spent between live and time-shifted (VOD & DVR) viewing across weekday (M-F) and weekend (Sa-Su)

TIME-SHIFTED VIEWING SHARE IS CONSISTENT THROUGHOUT THE DAY EVEN DURING PRIMETIME



Comcast Internal Viewership Data. Share of hourly time spent with Live vs Time-shifted Viewing. Q1 2019. Weekday: Mon-Fri. Weekend: Sat-Sun

IN Q1 2019 OVER 3/4 OF HHs WATCHED VOD AND MORE TITLES ARE BEING WATCHED THAN EVEN BEFORE

Comcast households watched nearly double the number of VOD titles than they did three years ago.

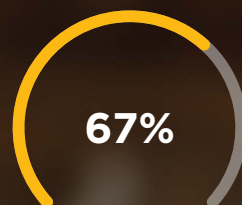


Watched VOD

Number of VOD Titles Watched per Month



Source: Comcast Viewership Data. Average VOD titles watched monthly.
*2016 based on Oct-Dec and 2019 based on Jan-Mar.



Time spent with VOD outside of primetime



PUTTING VIEWERSHIP DATA TO USE

Analysis: On average, Comcast households watch 34 different networks per month and over two thirds of their television viewing is done outside of primetime. This makes it increasingly hard for advertisers to build campaigns that achieve effective reach and frequency. Successful campaigns can no longer be built around a couple of networks in and around primetime.

Advertisers need to find viewers whenever and wherever they are watching – data enables them to do so.

Data-driven campaigns are content-agnostic. They incorporate more networks and broader dayparts to find the desired audience anytime and anywhere. Data-driven campaigns start with identifying an audience and then utilize data to target that audience directly, compared to legacy campaigns centered around specific content (whether it be by program, network or daypart).

An analysis of over 900 data-driven* local zone-level campaigns, revealed that data-driven campaigns (incorporating more networks across more dayparts) achieved reach levels +15% higher than their legacy campaign counterparts. This increase in reach was attained without sacrificing frequency, regardless of campaign size and investment level.

CAMPAIGN METRICS IN COMCAST HOUSEHOLDS DATA-DRIVEN CAMPAIGNS COMPARED TO LEGACY CAMPAIGNS

(Broken out by investment level)

Campaign Size	Reach	Frequency
Small	+10%	0.0
Medium	+24%	-0.3
Large	+19%	-0.3

*Campaigns that utilized Audience Intelligence for Local, Comcast Spotlight's proprietary local campaign building tool

Analysis based on Q3 2018 Comcast internal viewership data

CASE STUDY: LOCAL CAR DEALERSHIP

This particular dealer was interested in reaching new car intenders. They started by buying only a few networks during the evening. They then increased their investment by 22% and implemented a data-driven campaign that incorporated substantially more networks and ran throughout the entire day.

The data-driven campaign achieved nearly double the reach of new vehicle intenders and the frequency increased from 1.5 to 2.0. While the investment increased 22%, the dealer saw a 153% increase in target impressions.

Metrics

Target: New Vehicle Intenders

	Legacy	Data-Driven
Networks	11	42
Commercials	65	391
Reach	19%	36%
Frequency	1.5	2.0
Investment		+22%
Impressions		+153%

Target Reach Over Time by Campaign

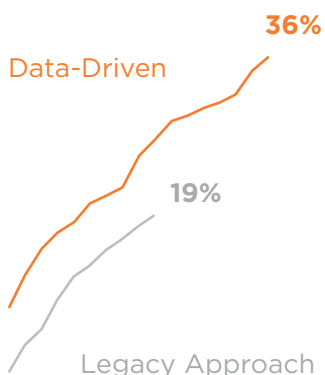
Data-Driven Approach

42 Networks

391 Commercials

36% Reach

2.0 Frequency



It's important to understand how different components of a campaign work together to achieve overall reach and frequency. There is still significant value in high-profile programming, especially when combined with an audience-based schedule built around data.

This particular automotive client had a data-driven component to their schedule that achieved a 31% reach with a 1.7 frequency. They had a separate sports schedule that delivered a 17% reach with a 3.4 frequency.

Together, the overall campaign reached 41% of their new vehicle intenders target.

Campaign	Reach	Frequency
Data-Driven	31%	1.7
Sports	17%	3.4
Combined	41%	2.1

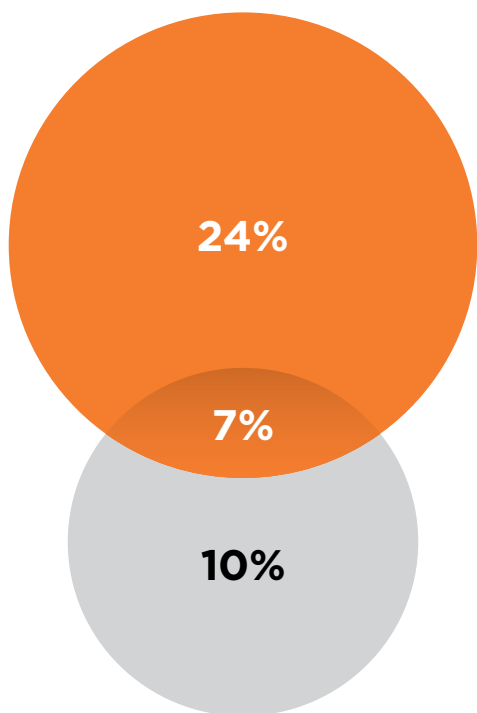
Analysis based on Q3 2018 Comcast internal viewership data

Target Reach by Campaign

Different components of the campaign work together to build overall campaign reach.

The data-driven component of the campaign acts as the foundation, but high-profile programming provides incremental reach.

In this example, of the total campaign reach, only **7%** were exposed to both the data-driven and the content-oriented (sports) aspects of the campaign.





SUMMARY

Q1 2019 WRAP UP

TELEVISION HAS EVOLVED

Set-top box data has opened up a path for marketers to take a data-enabled approach to TV buying

TV VIEWING AT A TWO-YEAR HIGH FOR Q1 2019

With the increase being driven by VOD and Cable networks

CABLE'S SHARE OF VIEWING STAYS CONSISTENT

Use data to better inform your next media plan

PEOPLE WATCH LIVE TV REGARDLESS OF DAY OR TIME

While also retaining a bulk of share compared to time-shifted viewing

VOD REPRESENTS LARGEST GROWTH IN VIEWING

And can be a great addition to a media buy for incremental reach

QUESTION ASSUMPTIONS ABOUT TV CONSUMPTION

Especially in relation to your target market and target audience

DATA-DRIVEN STRATEGIES DRIVE RESULTS

Advertisers adopting a data-driven TV strategy are seeing phenomenal success

AUTHOR BIOS



HEATHER COGHILL

Heather directs audience insights for Comcast Spotlight, building narratives around internal viewing data. Heather also oversees the support of Comcast Spotlight's national line of business and agency relations from a research perspective. Heather spent nearly ten years working at ESPN, overseeing strategic research surrounding specific audience segments, including Gen Z, Millennials, Women and Multicultural audiences.



CHRIS MCGINNIS

Chris is a Senior Analyst of Audience Insights at Comcast Spotlight. In this position, he leverages his passion for data storytelling to develop narratives that educate both internal stakeholders and external industry leaders. His 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 relations at Comcast Advertising in the U.S. and Europe. He leads the Comcast Advertising Agency Leadership Council, the Comcast Spotlight Automotive Advisory Council and the FreeWheel Council for Premium Video. Prior to joining Comcast, James was in various advertising roles at Microsoft for 6 years, was a founding team member of Advertising.com in Europe and started his career in television advertising sales in New York.

AUTHOR BIOS



LEE SINGLETARY

Lee manages Comcast Advertising's advisory councils in America including the Comcast Advertising Agency Leadership Council and the Comcast Spotlight 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. Prior to joining Comcast in 2015, Lee was a TV Producer, launching Philadelphia's first local TV digital streaming service for 24/7 news coverage.



ANDREA ZAPATA

Andrea Zapata oversees Spotlight's data innovation and measurement team as well as the in-market client research team. In this role, Andrea leads Spotlight's work to bring innovative, unique research solutions to market. She also provides custom research insights for local, regional and national businesses, as well as industry trends and insights that support Spotlight's internal teams. Andrea previously served as VP, Research and Analytics at Vevo and led Ad Sales Research at Hulu. Andrea began her research career at ESPN under the guidance of industry legends Artie Bulgren and Glenn Enoch.

Q1 2019: MARKET-LEVEL STATISTICS

MARKET NAMES A-K

Market	Average Nets Viewed	Cable Hours Share	Broadcast Hours Share	Premium Hours Share	Linear Hours/ Day	VOD & DVR Hours/Day	Linear Time Spent outside of Prime	Time Spent with Top 5 Nets	VOD Usage	VOD Time Spent outside of Prime
Full Footprint	34	65%	30%	5%	5:32	0:53	68%	30%	80%	67%
Albuquerque, NM	33	62%	33%	5%	5:29	0:57	68%	32%	82%	67%
Atlanta, GA	34	66%	29%	5%	5:21	0:49	68%	29%	79%	68%
Augusta, GA	37	66%	29%	5%	6:13	0:46	69%	30%	77%	69%
Baltimore, MD	37	64%	30%	5%	6:09	0:57	70%	29%	83%	69%
Boston, MA	33	62%	33%	4%	5:33	0:51	68%	30%	81%	66%
Burlington, NH	30	62%	34%	4%	5:02	0:51	67%	34%	84%	67%
Champaign, IL	33	65%	31%	4%	5:39	0:48	68%	31%	74%	69%
Charleston, SC	32	67%	28%	4%	4:56	0:44	68%	30%	80%	67%
Charlottesville, VA	32	67%	29%	4%	5:08	0:48	67%	32%	82%	65%
Chattanooga, TN	35	65%	31%	4%	6:03	0:43	69%	32%	75%	69%
Chicago, IL	35	66%	29%	5%	5:43	0:57	68%	30%	81%	68%
Colorado Springs, CO	33	65%	30%	5%	5:24	1:06	68%	31%	83%	68%
Davenport, IA	33	64%	32%	3%	5:46	0:43	69%	32%	71%	71%
Denver, CO	32	64%	31%	5%	4:54	0:55	67%	30%	82%	66%
Detroit, MI	36	62%	33%	5%	6:06	0:56	70%	33%	80%	69%
Eugene, OR	32	68%	29%	4%	5:20	1:03	69%	30%	80%	67%
Flint, MI	36	63%	33%	5%	6:30	0:50	70%	32%	78%	72%
Fresno, CA	35	69%	26%	4%	5:29	1:04	70%	27%	82%	69%
Ft. Myers, FL	31	63%	34%	3%	5:15	0:46	68%	37%	83%	62%
Ft. Wayne, IN	35	66%	30%	4%	6:08	0:51	70%	32%	76%	70%
Grand Rapids, MI	33	63%	33%	4%	5:39	0:45	69%	34%	75%	69%
Harrisburg, PA	34	65%	31%	4%	5:41	0:50	68%	32%	82%	68%
Harrisonburg, VA	34	68%	27%	4%	5:36	0:50	68%	30%	82%	68%
Hartford, CT	34	64%	32%	4%	5:43	0:52	68%	33%	81%	67%
Hattiesburg, MS	34	69%	26%	5%	5:09	0:39	68%	30%	74%	68%
Houston, TX	35	67%	28%	5%	5:28	1:03	67%	29%	88%	68%
Indianapolis, IN	36	65%	31%	4%	5:52	0:52	69%	29%	76%	70%
Jackson, MS	37	66%	29%	5%	5:52	0:52	67%	30%	85%	69%
Jacksonville, FL	34	67%	29%	5%	5:26	0:51	68%	29%	80%	67%
Johnstown, PA	34	66%	31%	4%	5:43	0:47	69%	32%	80%	69%
Knoxville, TN	36	67%	29%	4%	5:38	0:45	69%	31%	76%	68%

Q1 2019: MARKET-LEVEL STATISTICS

MARKET NAMES L-W

Market	Average Nets Viewed	Cable Hours Share	Broadcast Hours Share	Premium Hours Share	Linear Hours/ Day	VOD & DVR Hours/Day	Linear Time Spent outside of Prime	Time Spent with Top 5 Nets	VOD Usage	VOD Time Spent outside of Prime
Lafayette, IN	33	68%	28%	4%	5:32	0:46	69%	30%	73%	70%
Lansing, MI	33	64%	32%	4%	5:50	0:49	69%	32%	77%	70%
Little Rock, AR	35	65%	30%	5%	5:24	0:45	68%	30%	72%	69%
Memphis, TN	37	67%	28%	5%	6:03	1:00	68%	28%	87%	70%
Meridian, MS	35	68%	27%	5%	5:35	0:36	68%	30%	70%	69%
Miami, FL	31	73%	22%	5%	4:53	0:35	67%	24%	69%	66%
Minneapolis, MN	33	61%	35%	3%	5:28	0:50	66%	34%	80%	67%
Monroe, LA	37	68%	27%	5%	5:45	0:55	68%	28%	86%	68%
Monterey, CA	30	66%	30%	4%	4:43	0:48	68%	30%	75%	63%
Nashville, TN	35	62%	33%	5%	5:25	0:48	67%	34%	79%	68%
New York, NY	36	66%	29%	5%	6:00	0:50	69%	28%	80%	66%
Panama City, FL	34	67%	29%	5%	4:55	0:45	68%	33%	81%	67%
Peoria, IL	33	67%	29%	4%	5:39	0:49	68%	31%	75%	70%
Philadelphia, PA	37	64%	30%	5%	6:13	0:54	69%	30%	83%	68%
Pittsburgh, PA	37	61%	35%	4%	6:27	0:53	70%	35%	83%	69%
Portland, OR	33	67%	30%	4%	5:17	1:00	69%	29%	80%	67%
Richmond, VA	36	65%	30%	5%	6:01	0:53	69%	30%	83%	68%
Roanoke, VA	35	68%	29%	4%	5:42	0:50	69%	30%	81%	69%
Rockford, IL	33	64%	32%	4%	5:48	0:50	69%	33%	75%	71%
Sacramento, CA	33	69%	27%	4%	5:28	1:08	70%	26%	82%	68%
Salisbury, DE	32	65%	30%	4%	5:14	0:48	69%	32%	81%	68%
Salt Lake City, UT	31	64%	32%	4%	4:41	1:01	67%	31%	81%	68%
San Francisco, CA	30	67%	29%	4%	4:55	0:53	68%	27%	78%	64%
Savannah, GA	34	67%	28%	5%	5:13	0:44	69%	29%	77%	68%
Seattle, WA	32	63%	33%	4%	4:57	0:56	69%	30%	79%	66%
South Bend, IN	34	64%	32%	4%	5:35	0:47	69%	32%	77%	70%
Spokane, WA	32	62%	34%	4%	5:25	1:00	70%	33%	79%	68%
Springfield, MA	33	66%	30%	4%	5:52	0:49	69%	30%	78%	68%
Tallahassee, FL	33	69%	26%	5%	5:14	0:51	67%	29%	85%	66%
Tupelo, MS	36	67%	28%	5%	5:41	0:39	68%	31%	72%	69%
Washington, DC	34	69%	26%	5%	5:24	0:49	68%	26%	79%	68%

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