



# NBCUNIVERSAL'S ONE AUDIENCE TRENDS:

CROSS-PLATFORM CONSUMPTION REPORT  
SEPTEMBER 2020

**NBCUniversal**  
Insights & Measurement

# EXECUTIVE SUMMARY

Television used to be simple, just three black-and-white channels, broadcast into living rooms across America. Today, viewers have access to unlimited platforms, programs, and screens. But despite this, the relationship between viewers and marketers remains largely unchanged. **Viewers still want great stories that entertain, inform, and inspire them. Marketers still want to connect with engaged audiences, and use their ads to move people to action.**

But while the power of television—and premium content—has held steady in recent decades, nearly everything else has changed dramatically. **Advertisers must create plans that reflect our new reality—one where television is everywhere, and legacy delineations between platforms and screens are obsolete.**

As we think about the future of media, consumer choice, and cross-platform consumption, what does the path forward look like for marketers? What steps can we all be taking today to ensure that we're ready for tomorrow?



*In this white paper, we will explore new findings and proprietary data regarding viewership trends, analyze the impact of these shifts, and provide insight into how marketers can tap into the full power of passionate audiences across the globe—and across all touchpoints to transform how they do business.*

## KEY TAKEAWAYS

01

Live TV is still an important part of the media mix, but the traditional TV schedule must be reconfigured for the all-screen era.

02

Marketers who plan their premium video in silos are missing an opportunity to amplify their message across all screens.

03

When marketers reflect shifts in consumer behavior—moving to a cross-platform planning and investment strategy—they can drive significant business impact and boost brand KPIs that matter.

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# INTRODUCTION

**Premium video drives consumers to action.** Time and again, television has proven to be one of the most powerful tools in a marketer's belt. As we all know, TV drives greater *reach across all screens*, which generates *long-lasting brand awareness*, which creates substantial *consumer influence*, and ultimately *delivers sales*.

**Technology and content have evolved in tandem over the last decade, creating new ways to watch, as well as new kinds of tailored viewing experiences.** Yet, as these innovative formats emerged, the industry responded in a stifling way, erecting rigid silos: linear vs. digital, live vs. VOD, long-form vs. short-form, mobile vs. CTV. In practice, these binary distinctions undermined ad planning, leading organizations to develop separate budgets and

planning strategies for “linear” and “digital,” and often choosing to invest in one, rather than both.

Now in 2020, the video landscape is more complicated than ever—which makes it more difficult to understand where and how consumers are actually watching. With no independent measurement solution that can provide a full picture of consumption, **our industry has yet to reach a broad consensus on how to best engage viewers and drive results for our partners.**

*In this report, we will use our own proprietary data to help establish shared truth, dispel common misconceptions, and illuminate a transformative path forward that reimagines how advertisers and consumers engage.*



# BROAD CONSUMPTION TRENDS

At NBCUniversal, we're fortunate to reach an enormous cross-section of the country, which offers us a bird's-eye view of how consumption is changing.

*Each month, we reach more than 232 million U.S. adults across every key consumer segment.*

As we've aggregated data from across our wide-reaching properties, we've identified several key consumption trends that illustrate the importance of looking at premium content consumption holistically.

## AUDIENCES OF ALL AGES ARE WATCHING ON THEIR OWN TERMS

Live TV still plays an incredibly important role within the TV landscape today, driven by live programming formats like News and Sports. In fact, over 90% of all time spent with NBCU News and Sports content is spent viewing live. However, more and more, **viewers are tuning in on their own terms and drastically shifting how they think about "TV time"**—a trend best represented by taking a closer look at Entertainment programming.

With this content, viewing has expanded well beyond the bounds of real-time programming. Across all demographics, it's clear that consumers are watching on their own time and terms.

Within the NBCUniversal portfolio, viewership of Entertainment content is continuing to expand

well beyond just linear—from STB VOD, to DVR, to CTV and traditional digital. For example, 76% of all 18-34 viewing is now sourced from streaming and on-demand platforms. Given everything we know about this generational cohort, this shouldn't come as a shock. **Far more surprising, though, is that Adults 50+ are also driving this trend**, and this demographic now splits viewing of Entertainment programming equally between live linear TV and streaming / on-demand.

### Proportion of viewing that is time-shifted (streaming, on-demand, digital)



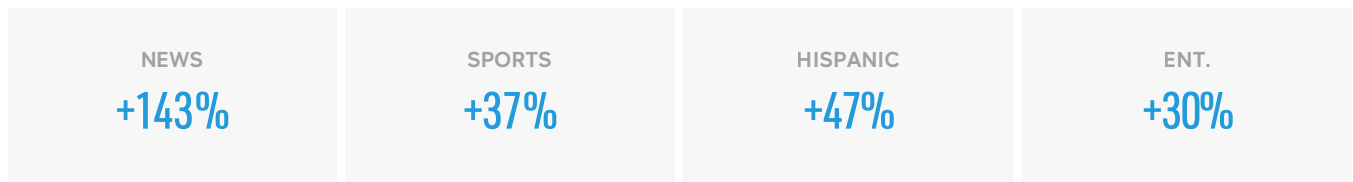
## THE STATE OF CONSUMPTION AT NBCU: LINEAR + DIGITAL

Second, we find that **digital viewing is driving the shift toward on-demand programming**, encompassing a larger proportion of total consumption each year. In fact, every year for the past five years, **NBCU’s digital content consumption has grown at a minimum of 30% year-over-year.**

**NBC leads the NBCUniversal portfolio in both digital share and volume, across all demographics.** Cable heavy-hitters like Bravo and CNBC original content follow close behind, with the former driven by long-form digital content and the latter by short-form.

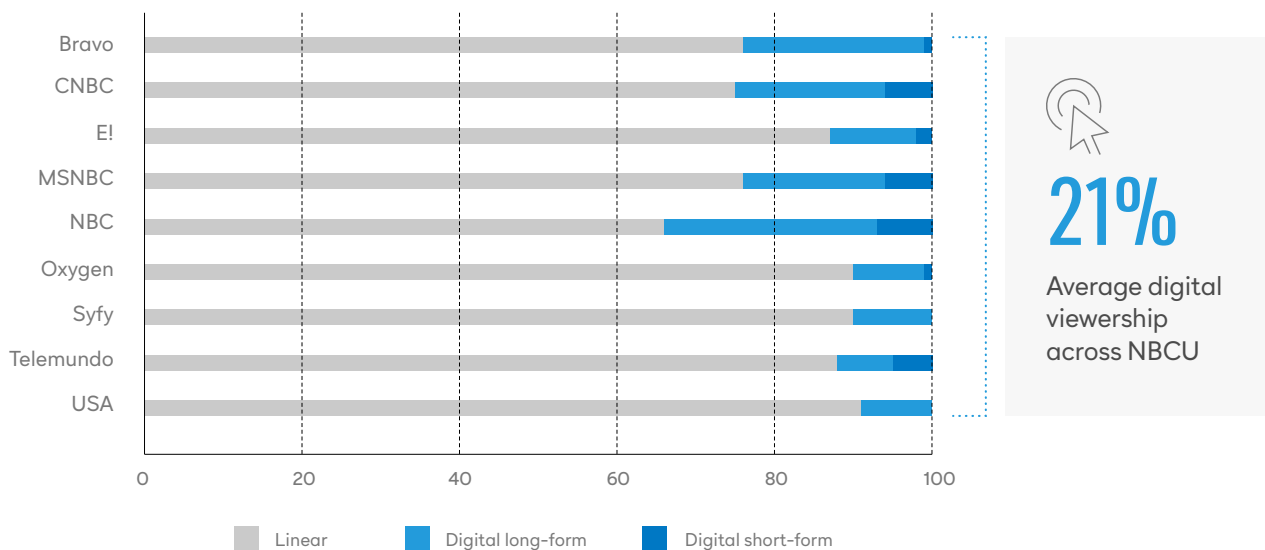
Nonetheless, every type of content in the NBCU portfolio has grown digital viewership. This growth is coming from all digital formats as well: CTV leads the charge with 95% growth, while “personal device” viewership (desktop and mobile/tablet) grew 37% last year.

### Digital viewership growth across NBCU



*As viewers embrace digital platforms, one thing is clear: marketers must plan holistically across all platforms or risk missing out on up to one-third viewership for some of the biggest content in media.*

### Watch-time by network (A18-49)





97%

of consumption in a typical NBCU campaign occurs on a TV screen, either via linear, CTV, or STB VOD.

74%

of NBCU digital content is watched on a TV screen.

## THE TV ON THE WALL STILL MATTERS MOST

Third, television screens are still, by far, the primary destination for viewing. While this may seem counterintuitive with the growth of digital, the big screen is still where consumers prefer to watch.

The reality remains that televisions provide a superior experience for viewers interested in premium video content. The proliferation of smart TVs means that more people can access digital platforms on screens that offer higher resolution and more viewing area than mobile devices. But televisions don't just offer a great experience for viewers—they also offer valuable opportunities for marketers.

*As CTV grows increasingly popular, advertisers will see new opportunities for versatility, flexibility, and targeting.*



# THE NEW SCHEDULE

These changing consumption patterns will have a transformative effect on the future of ad buying and planning. Understanding network schedules has long been a key competency for any media buyer—but dated ideas about the importance of daily ratings have held the industry back, preventing us from transforming and adopting a modern, cross-platform approach to planning. As we’ve aggregated data from across our wide-reaching properties, we’ve identified several key consumption trends that illustrate the importance of looking at premium content consumption holistically.

To better understand the interplay between linear, on-demand, and digital viewership, we’ll use NBC’s 2019/2020 weekly schedule as a case study.

The chart below is broken into two sections. The upper segment shows the typical Monday through Sunday linear airings on NBC. The lower segment illustrates the most-watched shows on digital and on-demand platforms for that day of the week. Together, these sections highlight the most popular programs across the entire NBCU portfolio—linear, digital, live, and on-demand—and reveal a unique “viewing rhythm” for each program.

Buyers would be keen to capitalize on these unique rhythms, and we’ll explore a few instructive examples.

## Shows aired live & top 5 shows streamed on demand

Linear

	THIS IS US	CHICAGO P.D.	LAW & ORDER	DATELINE	SNL	FOOTBALL NIGHT AMERICA
BLUFF CITY LAW	NEW AMSTERDAM	CHICAGO MED CHICAGO & FIRE	The Good Place	BLACKLIST		

Streaming, on-demand, digital

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
#1	SNL	Voice	THIS IS US	CHICAGO P.D.	LAW & ORDER	DATELINE	FOOTBALL NIGHT AMERICA
#2	THIS IS US	BLUFF CITY LAW	NEW AMSTERDAM	THIS IS US	THIS IS US	THIS IS US	SNL
#3	Voice	THIS IS US	Voice	CHICAGO & FIRE	CHICAGO P.D.	LAW & ORDER	THIS IS US
#4	LAW & ORDER	SNL	BLUFF CITY LAW	CHICAGO MED	Voice	BLACKLIST	LAW & ORDER
#5	NEW AMSTERDAM	NEW AMSTERDAM	SNL	Voice	CHICAGO & FIRE	Voice	Voice

## Key insight: FOMO drives the unique viewing rhythm for *The Voice*.

The “FOMO” (fear of missing out) or “watercooler” effect is real, and for evidence, look no further than how viewers are watching *The Voice* each week. This program airs live on Monday—and then peaks on-demand on Tuesday and Wednesday, as fans who missed are eager to catch up, avoid spoilers, and discuss the results with friends, family, coworkers, and other fans on social media.

### Shows aired live & top 5 shows streamed on demand

Linear

	THIS IS US	CHICAGO P.D.	LAW & ORDER	DATELINE	SNL	FOOTBALL NIGHT AMERICA
BLUFF CITY LAW	NEW AMSTERDAM	CHICAGO MED CHICAGO FIRE	The Good Place	BLACKLIST		

Streaming, on-demand, digital

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
#1	SNL		THIS IS US	CHICAGO P.D.	LAW & ORDER	DATELINE	FOOTBALL NIGHT AMERICA
#2	THIS IS US	BLUFF CITY LAW	NEW AMSTERDAM	THIS IS US	THIS IS US	THIS IS US	SNL
#3		THIS IS US		CHICAGO & FIRE	CHICAGO P.D.	LAW & ORDER	THIS IS US
#4	LAW & ORDER	SNL	BLUFF CITY LAW	CHICAGO MED		BLACKLIST	LAW & ORDER
#5	NEW AMSTERDAM	NEW AMSTERDAM	SNL		CHICAGO & FIRE		

## Key insight: A fan favorite leads time-shifted viewership throughout the week.

When reviewers call *This Is Us* the #1 show on TV, they aren't just talking about linear ratings. *This Is Us* remains a top-three on-demand offering every single day of the week—and three days a week, it's the number-one program. **This show is a fan-favorite every single day, and it underscores the importance of thinking about ad planning in terms of titles, not time slots.**

### Shows aired live & top 5 shows streamed on demand

Linear

	<b>THIS IS US</b>	CHICAGO P.D.	LAW & ORDER	DATELINE	SNL	
BLUFF CITY LAW	NEW AMSTERDAM	CHICAGO MED CHICAGO FIRE	The Good Place	BLACKLIST		

Streaming, on-demand, digital

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
#1	SNL		<b>THIS IS US</b>	CHICAGO P.D.	LAW & ORDER	DATELINE	
#2	<b>THIS IS US</b>	BLUFF CITY LAW	NEW AMSTERDAM	<b>THIS IS US</b>	<b>THIS IS US</b>	<b>THIS IS US</b>	SNL
#3		<b>THIS IS US</b>		CHICAGO & FIRE	CHICAGO P.D.	LAW & ORDER	<b>THIS IS US</b>
#4	LAW & ORDER	SNL	BLUFF CITY LAW	CHICAGO MED		BLACKLIST	LAW & ORDER
#5	NEW AMSTERDAM	NEW AMSTERDAM	SNL		CHICAGO & FIRE		

## Key insight: SNL dominates digital with a “halo effect” in the days after airing.

**Saturday Night Live** also exhibits unique consumption trends—specifically, a “halo effect.” Following its standard late-night premiere, SNL picks up steam online in the days that follow. Driven by the FOMO effect, social buzz, and short-form online clips, SNL peaks in digital and on-demand viewing on Sunday and Monday as fans view full episodes, as well as shorter highlight clips.

### Shows aired live & top 5 shows streamed on demand

Linear

	THIS IS US	CHICAGO P.D.	LAW & ORDER	DATELINE	<b>SNL</b>	
BLUFF CITY LAW	NEW AMSTERDAM	CHICAGO MED CHICAGO FIRE	The Good Place	BLACKLIST		

Streaming, on-demand, digital

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
#1	<b>SNL</b>		THIS IS US	CHICAGO P.D.	LAW & ORDER	DATELINE	
#2	THIS IS US	BLUFF CITY LAW	NEW AMSTERDAM	THIS IS US	THIS IS US	THIS IS US	<b>SNL</b>
#3		THIS IS US		CHICAGO & FIRE	CHICAGO P.D.	LAW & ORDER	THIS IS US
#4	LAW & ORDER	<b>SNL</b>	BLUFF CITY LAW	CHICAGO MED		BLACKLIST	LAW & ORDER
#5	NEW AMSTERDAM	NEW AMSTERDAM	<b>SNL</b>		CHICAGO & FIRE		

## Key insight: Chicago series draws viewers in a sharp 24-hour peak.

Unlike previous examples, **Chicago franchise shows have a very tight viewership window. Devoted fans watch the show live and in the day that follows**, rather than stretching their viewing throughout the week. On-demand ratings generally peak within 24 hours of original airtime.

### Shows aired live & top 5 shows streamed on demand

Linear

	THIS IS US	<b>CHICAGO P.D.</b>	LAW & ORDER		SNL	
BLUFF CITY LAW	NEW AMSTERDAM	CHICAGO MED CHICAGO FIRE	The Good Place	BLACKLIST		

Streaming, on-demand, digital

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
#1	SNL		THIS IS US	<b>CHICAGO P.D.</b>	LAW & ORDER	DATELINE	
#2	THIS IS US	BLUFF CITY LAW	NEW AMSTERDAM	THIS IS US	THIS IS US	THIS IS US	SNL
#3		THIS IS US		<b>CHICAGO &amp; FIRE</b>	<b>CHICAGO P.D.</b>	LAW & ORDER	THIS IS US
#4	LAW & ORDER	SNL	BLUFF CITY LAW	<b>CHICAGO MED</b>		BLACKLIST	LAW & ORDER
#5	NEW AMSTERDAM	NEW AMSTERDAM	SNL		<b>CHICAGO &amp; FIRE</b>		

## RETHINKING THE WEEK: MYTHS DISPELLED

While NBC is only one network, our viewership data underscores a fundamental, and unavoidable, truth. **We can't evaluate a TV schedule solely based on dated perceptions of how viewers behave. In this era of big data, instinct is obsolete.** "Must-See-TV Thursdays" are a relic. When viewers have more choice than ever before, every day of the week is a Must-See-TV day. Across the board, we must transform buying strategies to match changing consumption trends.

In particular, it's time to do away with two prevailing myths:

**MYTH #1** Daily ratings = viewership

**FACT #1** Overnight ratings only tell a small part of the story.

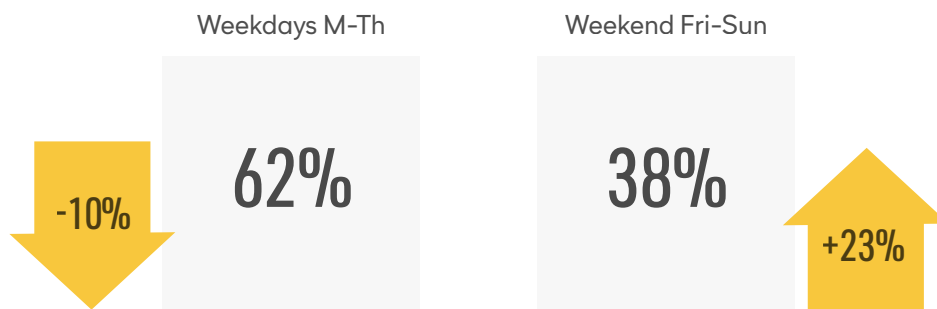
To get an accurate representation of true viewership, we must incorporate linear, digital, and VOD consumption.

**MYTH #2** Weekdays rule the roost

**FACT #2** Weekend nights are now a vital part of the media ecosystem.

To get an accurate representation of true viewership, we must incorporate linear, digital and VOD consumption. A decade ago, most weekly viewership took place Monday through Thursday—and while this is still technically true today, the balance has shifted substantially. Consumption rises at the end of the week, up 23% over the past decade. Increasingly, viewers are tuning in during their free time, which means weekends are now a vital piece of the media ecosystem. These days of the week have long been overlooked due to smaller linear audiences and a lack of new content—but **the weekend now represents a key opportunity to reach audiences** as they catch up on programs and revisit old favorites.

### % Share viewership throughout week 2019 vs 2009



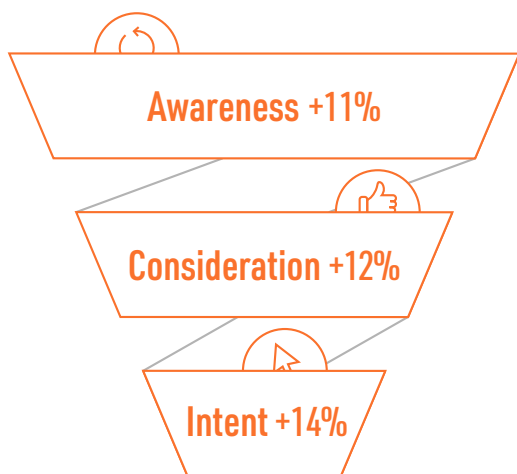
# REFLECTING TRENDS, SHIFTING DOLLARS, CREATING IMPACT

How do marketers fare when they adapt to these changing consumer norms? We aggregated results across several campaigns to illustrate what happens when brands move from binary buys (linear vs. digital) to truly cross-platform planning.

## EXPANDING YOUR REACH

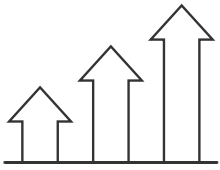
With no incremental increase to your advertising budget, we found:

Allocating a flat budget to a more balanced, optimized schedule...	Leads to improved reach	And lower frequency
<b>+11ppt</b>	<b>+26%</b>	<b>-18%</b>
Historical: Digital 2% of plan	33.6%	5.1
Optimized: Digital 13% of plan	42.3%	4.2



## DRIVING RESULTS ACROSS ALL KPIS

Second, we find that brands who invested in multiple viewership pathways saw significantly higher brand impact, across all vital KPIs. From the top of the funnel (brand awareness) to the middle of the funnel (consideration) to the bottom of the funnel (intent), **cross-platform advertisers enjoyed double-digit advantages over those who stuck to the old playbook.**



**+75%**

Better lift on cross-  
platform vs TV-only

Linear + Digital Video (14%)  
vs Linear Only (8%)

### CASE STUDY: CASUAL DINING RESTAURANT

Case studies demonstrate this cross-platform trend. Take, for example, this casual dining restaurant, interested in driving foot-traffic. Single-platform exposure on TV resulted in a respectable lift in conversion (vs. no exposure), while cross-platform exposure drove even more impressive impact.

*Cross-platform exposure significantly boosted visitation by more than 75% compared to TV-only exposures.*



# CONCLUSION

In just a few short years, the television landscape has undergone a seismic shift—and instinct alone can no longer guide our planning and buying decisions. In this new era of digital viewing and on-demand streaming, it's more important than ever to invest in data-driven consumer insights.

Though much has changed, the core relationship between network, marketer, and viewer remains largely the same. Viewers still want great stories that entertain, inform, and inspire. Marketers still want to connect with engaged audiences, and use their ads to move people to action. Below are three key recommendations for advertisers as they work to do exactly that.

- 01** **RETHINK** the focus on traditional TV screens, adopting new strategies that are fit for the all-screen era.
- 02** **MAXIMIZE** reach by acknowledging the value of both linear and digital programming.
- 03** **INVEST** in both linear and digital premium video to engage with more consumers and drive KPIs that deliver impact for brands.

The shifting media landscape presents a great deal of opportunity to marketers willing to address it head-on. As our industry works to navigate these unfamiliar waters, we hope this analysis can help us chart the course forward—together.

Sources available at: <https://together.nbcuni.com/news/one-audience-trends/>

