

# THE STATE OF VIEWERSHIP



Q1 2022 | UNITED STATES

ANALYZING APPROXIMATELY 24 BILLION  
HOURS OF LINEAR AND STREAMING

# TABLE OF CONTENTS



**03** Executive Summary

**04** Linear & Streaming TV Trends

**10** Live TV Events

**16** Advertising

**23** Politics in Focus

**27** Consumer Snapshots

# EXECUTIVE SUMMARY

The first few months of 2022 continue a two-year trend of immense change for the future of TV and consumer engagement. Cord cutting continues to accelerate. The flood of incredible content into the streaming marketplace continues unabated, capturing an ever larger share of total TV viewership time just as the Academy crowned the first ever streamer as its Best Picture winner. At the same time, our industry has undergone substantial shifts related to how we are positioning for the future of measurement and consumer engagement across every screen in our lives. Both Disney and NBC Universal signaled the end of the single currency world, embracing a multi-currency model that truly empowers advertisers and content owners alike.

In this quarter's State of Viewership Report, the data further showcases the challenges advertisers face in reaching fresh audiences and validates the need to embrace these new models to future proof advertising for the next generation. We saw more and more households shift away from linear this quarter, with the rate of cord-shaving up 20% year-over-year. The picture gets even more unbalanced when we look deeper into the data, with one in four millennials (A25-34) watching less than one hour of linear TV per week, and households under the age of 45 exposed to 24% fewer linear ads than homes with older viewers.

The unbalance of linear reach remains a real problem for linear advertisers, with the vast majority of linear ad impressions (94%) reaching and oversaturating the same 55% of TV viewers. Moreover, linear ads disproportionately reach older, white viewers, while leaving Gen Z, millennials, and diverse audiences less likely to be exposed.

Despite the flock to OTT, streamers too face substantial challenges in maintaining growth and retaining subscribers. Samba TV data from the quarter shows us that consumers are willing to shift subscriptions at will and the need to maintain fresh content is at a record high. In fact, many OTT viewers only watch one program per streamer, creating significant exposure for subscriber churn in an SVOD-only model.

With the first quarter of the year now behind us, the data from Samba TV's State of Viewership report paints a clear picture of a robust and growing CTV market, and at the same time validates the steps being taken across our industry to embrace a flexible advertising model that empowers advertisers to reach their audiences anywhere, on every screen.



Team Samba TV





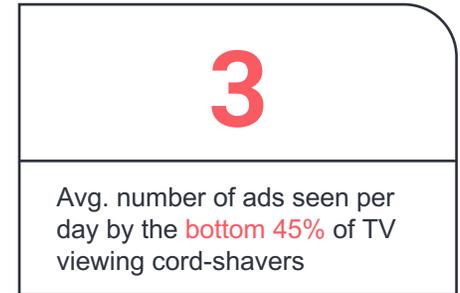
## Linear & Streaming TV Trends

More and more households cut the cord this quarter, but to capture and retain their attention OTT providers will need to up their game. Viewers show limited willingness to pay for all of the SVOD options available, and many are only watching one program per service.

# Cord-shaving accelerates year-over-year

As streaming options become more and more robust, the number of people cutting and shaving the cord continues to increase. About 50% of households watched linear each day this quarter on average, consistent with Q1 2021, but the percentage of households beginning to shift their habits away from linear has increased by 20%. The picture gets even more unbalanced when looking at younger households, with one in four millennials (A25-34) watching less than one hour of linear TV per week.

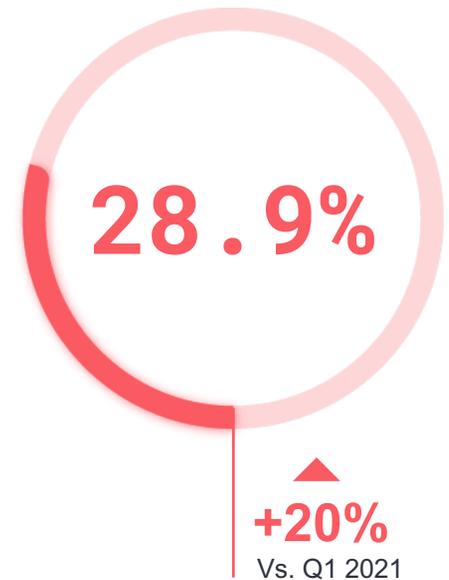
In order to reach these elusive audiences, advertisers need to get creative with their buying strategies and ensure they're using a holistic approach. Samba TV data shows that about half of cord-shavers only see three linear TV ads per day, highlighting the necessity of reaching these viewers on digital and CTV.



One in four **millennial** households **watched less than one** hour of traditional TV per week



► Percentage of **cord-shaving** households  
Q1 2022



# Consumers show willingness to watch two or three SVOD services, but draw the line at 4+ subscriptions



As cord cutting continues to accelerate, consumers remain engaged with SVOD platforms. However, the public’s willingness to subscribe to all the SVOD platforms they want may be limited by price constraints. Samba TV data showed that 59% of SVOD-viewing households watched more than one service in Q1 2022, but less than a quarter watched four or more services. With the financial commitment of SVOD, consumers may be looking for more cost-effective AVOD opportunities for their entertainment. [Accenture data](#) shows that 63% of consumers think it’s too expensive to pay for all the entertainment subscriptions they want, propelling services like Netflix to embrace AVOD.

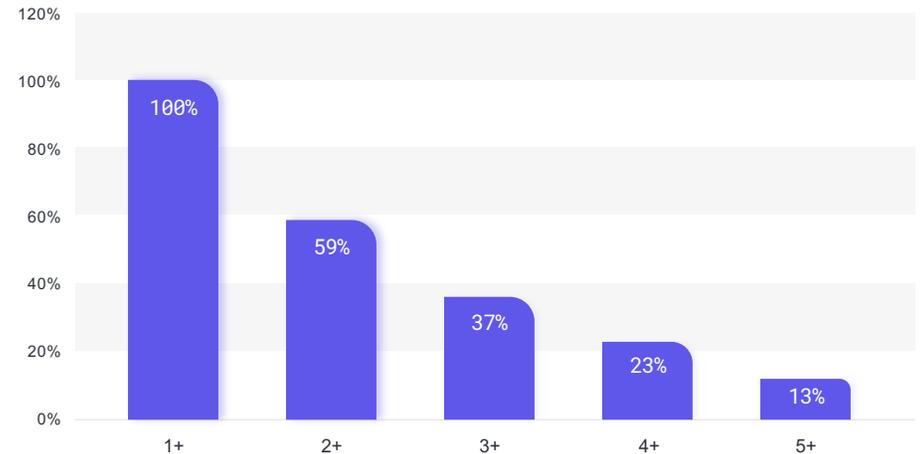
# 85%

of U.S. households have at least one SVOD subscription



Source: Kantar January 2022

► Percentage of SVOD viewing households watching multiple services Q1 2022



# SVODs risk churn with limited stickiness in top streaming platforms

Between half and two-thirds of Hulu, HBO Max, and Amazon Prime Video's top program viewers watched just one program among the streamer's top 50 shows during Q1 2022. Pam & Tommy, Euphoria, and Hotel Transylvania 4 were the highest reaching shows among households watching just one program per service. With subscription cycling becoming a regular way of life for millions of households, many providers face an increasing risk of losing subscribers who tuned in just for one program. Disney+ and Netflix fared better than any other major streamer measured in capturing viewership for multiple titles from a majority of their viewers. The average Disney+ viewer watched three of the top 50 programs and the average Netflix viewer watched four, highlighting those platform's effective use of in-app and omni-screen promotional efforts to more deeply engage audiences.

▶ Percentage of viewing households that only watched one program\* (among top 50)

Q1 2022



61%



58%



56%



42%



30%

▶ Highest reaching shows among single-program viewers



Pam & Tommy



Euphoria



Hotel Transylvania 4



Encanto



Ozark

\*Programs include movies and any episode, or multiple, of a show

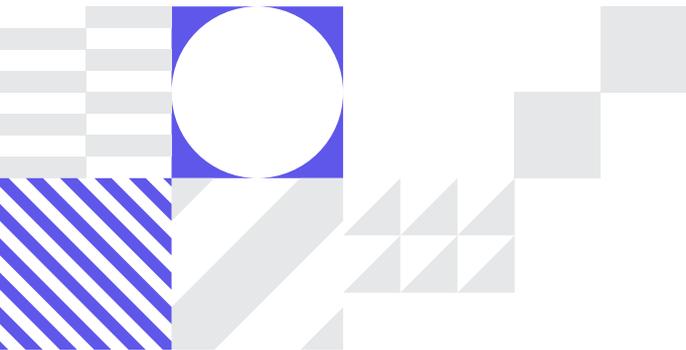
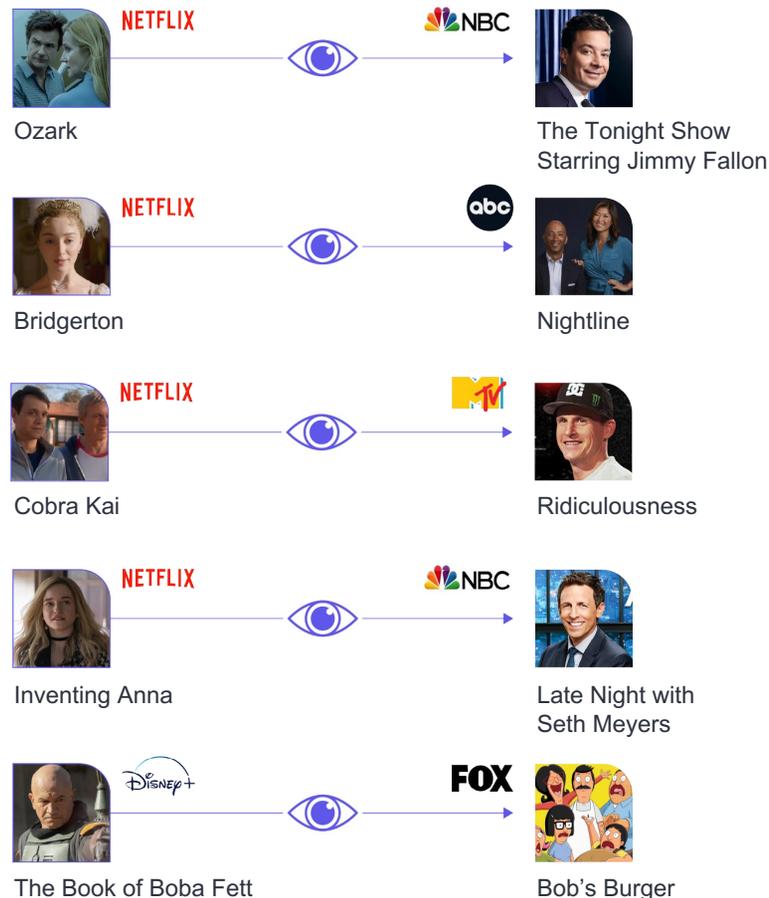
# Bridging SVOD to linear: how to reach your streaming audience in an ad-supported world

With so many viewers cutting or shaving the cord in favor of Netflix and other OTT platforms, it is important for advertisers to find the linear airtime OTT viewers are still interested in. With cross-screen and omnichannel data, there are ways to still reach key streaming audiences where it counts. For example, viewers of the top streaming program of the quarter (Ozark) were most likely to watch The Tonight Show Starring Jimmy Fallon on linear.

Notably, sports still wears the crown as the biggest linear driver with the top linear programs of the quarter all being live sports. A sweet spot for advertisers that aren't looking for big-budget sports buys could be the shows that follow live sporting events, which also see relatively high viewership.

## ▶ Top reaching streaming programs Q1 2022

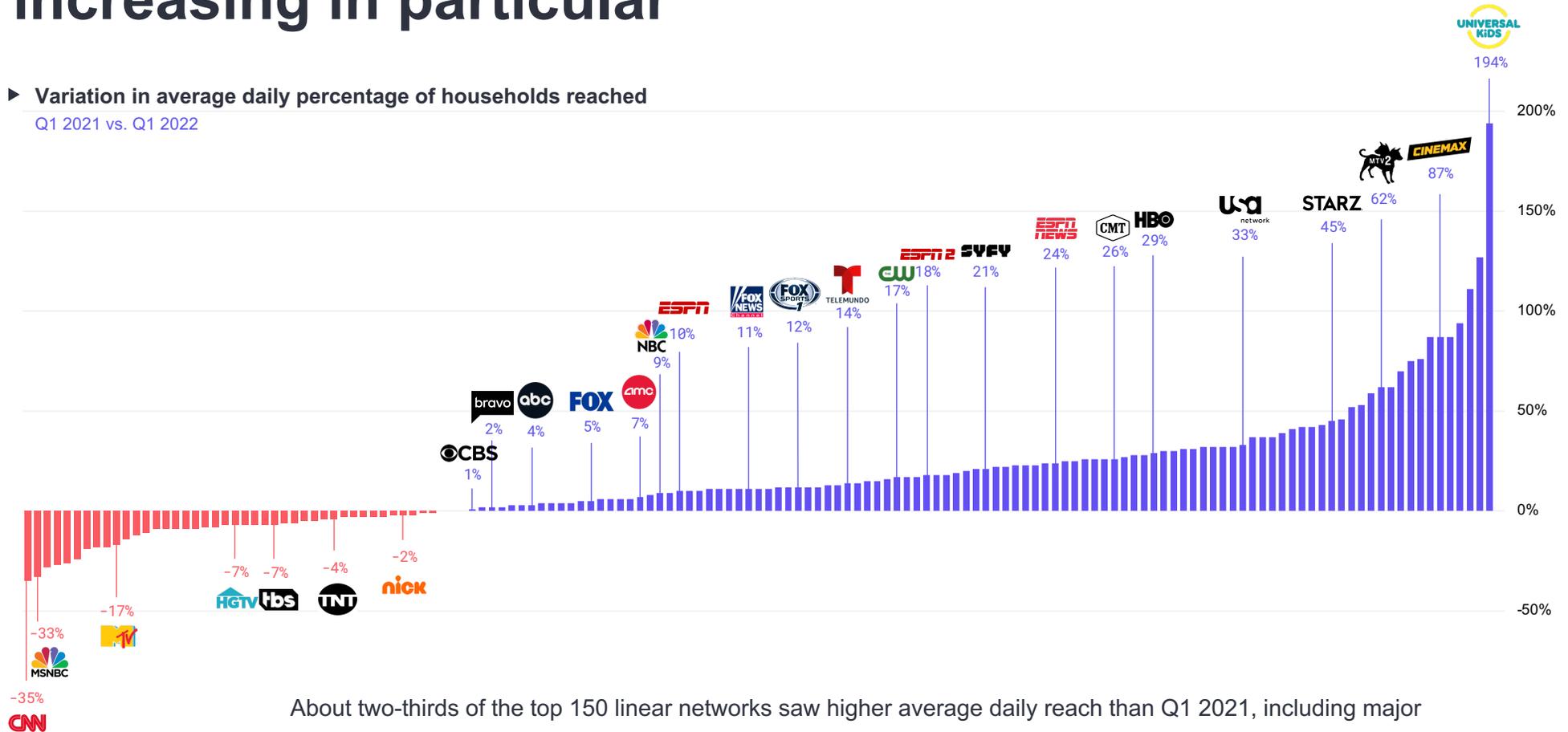
## ▶ Highest indexing linear programs among viewers of streaming program Q1 2022



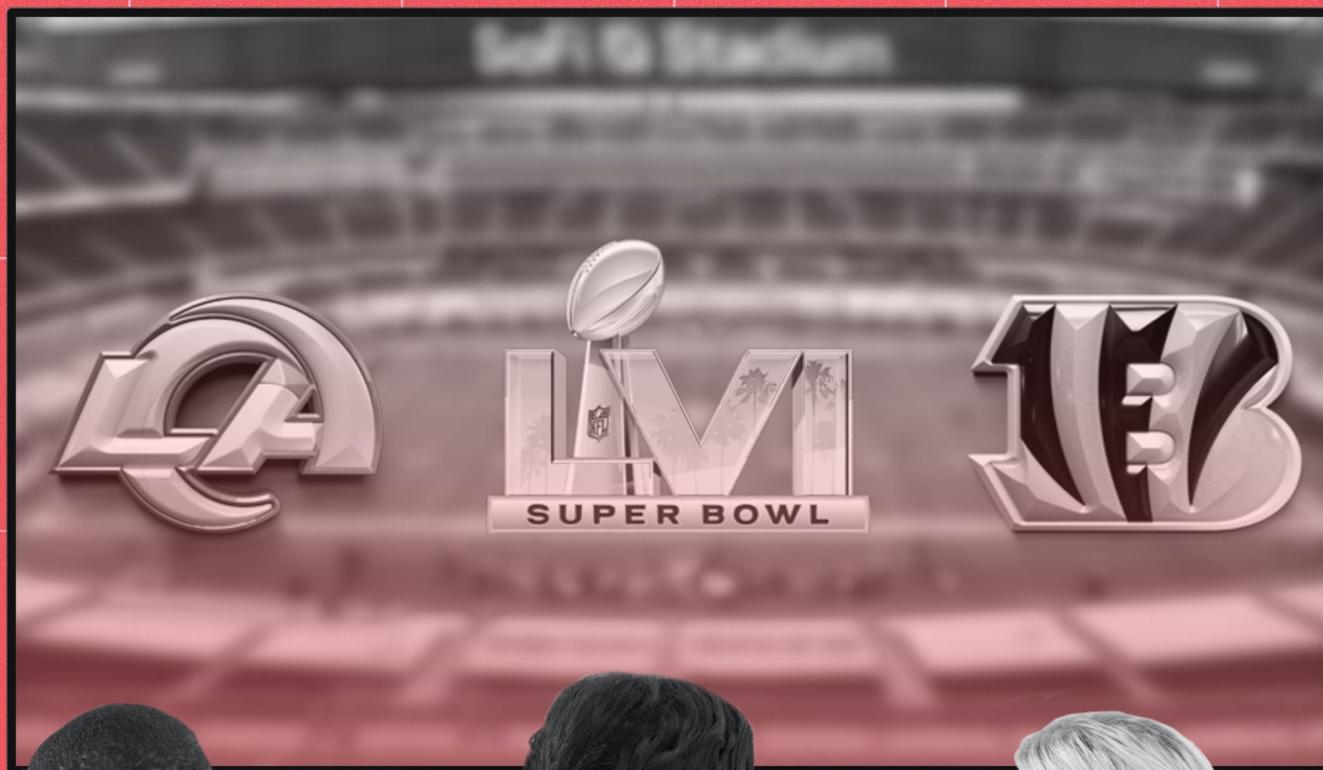
# The majority of networks saw year-over-year growth, with premium and cable entertainment increasing in particular

► Variation in average daily percentage of households reached

Q1 2021 vs. Q1 2022



About two-thirds of the top 150 linear networks saw higher average daily reach than Q1 2021, including major broadcast networks NBC, FOX, ABC, and CBS. This supported an overall 1% increase in the average daily reach of linear TV as a whole. The networks with the highest year-over-year growth included entertainment networks such as USA, CMT, and SYFY, along with premium and sports networks. On the other hand, news networks MSNBC and CNN saw year-over-year declines in reach, with relatively limited tune-in during the majority of Q1 2022 until Russia’s invasion of Ukraine in late February. Comparatively, the 2021 Capitol attack on January 6, 2021, along with President Joe Biden’s inauguration on January 20, 2021, drove high news viewership in Q1 2021.

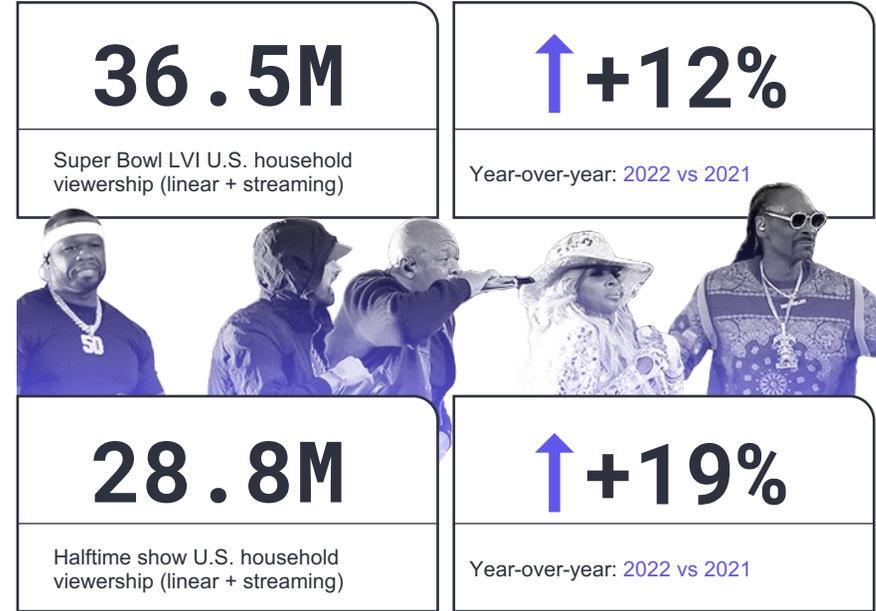


## Live TV Events

Live events maintain interest among viewers, even as overall linear viewership declines. The Super Bowl and Oscars were both up year-over-year, and people flocked to cable news for coverage on Ukraine. However, with live sports coverage moving to streamers, it's unlikely that live events will remain the saving grace for linear much longer.

# Super Bowl halftime show rocks the ratings and retains viewers

Overall game viewership was up 12% year-over-year, with the halftime show specifically driving a higher 19% year-over-year increase. In fact, 1.2M households didn't even bother with the first half - they began watching at halftime and stayed for the game, up 41% from last year. All of the top five reaching ads aired during halftime, outpacing the bottom performers by about 6M views.



## ► Top 5 highest reaching ads

	Bring Down the House	26.7M
	Tundra	26.5M
	American Song contest	26.5M
	Bel-Air	26.5M
	5G Home Internet	26.4M

**-24%**  
Reach difference

## ► Bottom 5 lowest reaching ads

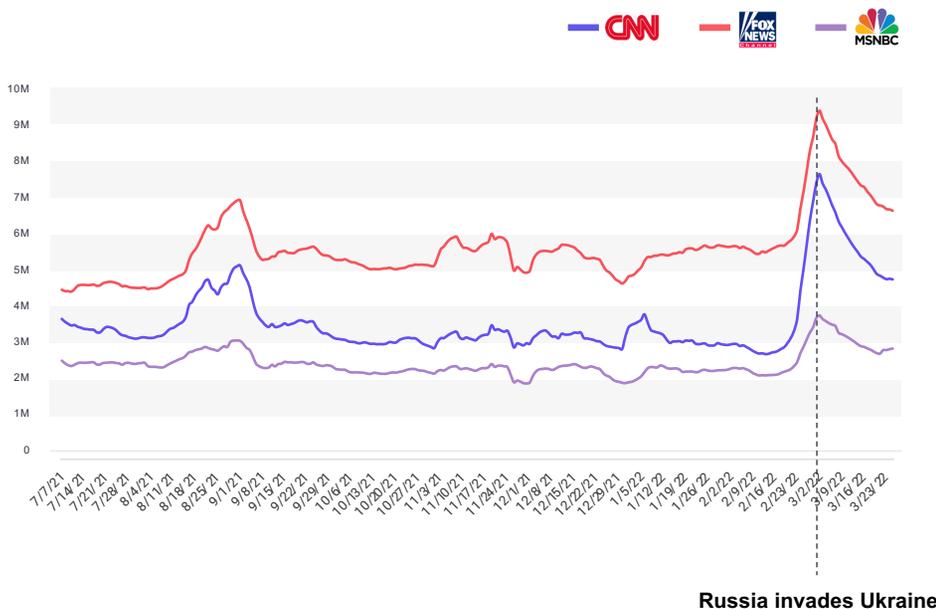
	Beijing 2022 Winter Olympics	20M
		20M
		20.1M
		20.1M
		20.1M

# Viewers flocked to broadcast and cable news for coverage during the onset of Russia's invasion of Ukraine

With the world gripped by Russia's invasion into Ukraine, and the Ukrainian people's brave resistance, Americans turned to traditional linear news for their information. On February 24, the day that Russia launched its invasion of Ukraine, CNN, FOX News, and MSNBC all saw record viewership versus the previous six month time period. Across each cable news outlet viewership remained well above the pre-invasion baseline throughout the quarter. Similarly, CBS, ABC, and NBC Sunday news talk shows also saw spikes following the invasion, though they were less dramatic than the spikes seen on cable.

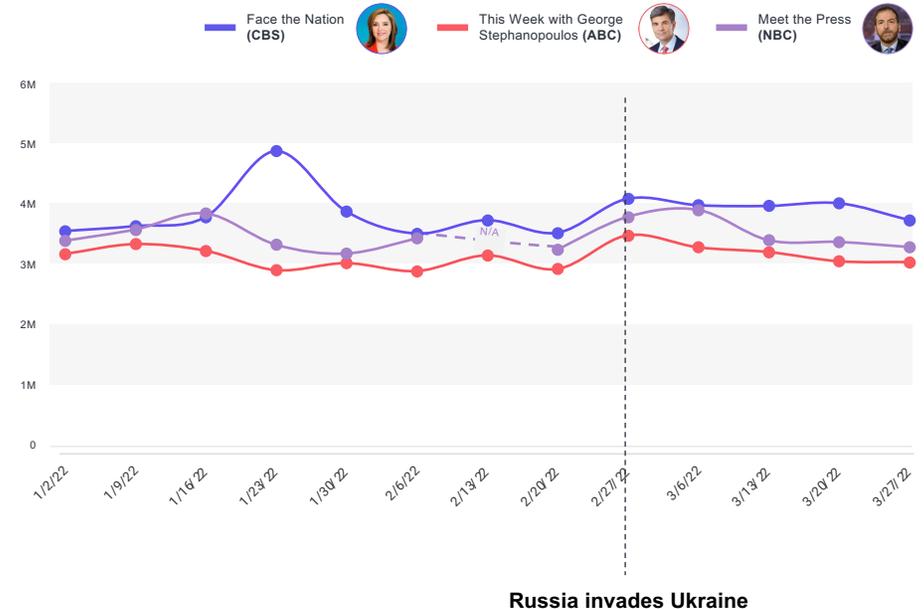
## ► Cable news network daily reach (7 day moving avg)

Q3 2021 – Q1 2022



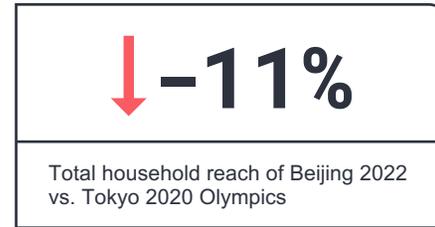
## ► Broadcast news Sunday show weekly reach

Q1 2022



# Olympics viewership of Beijing 2022 falters

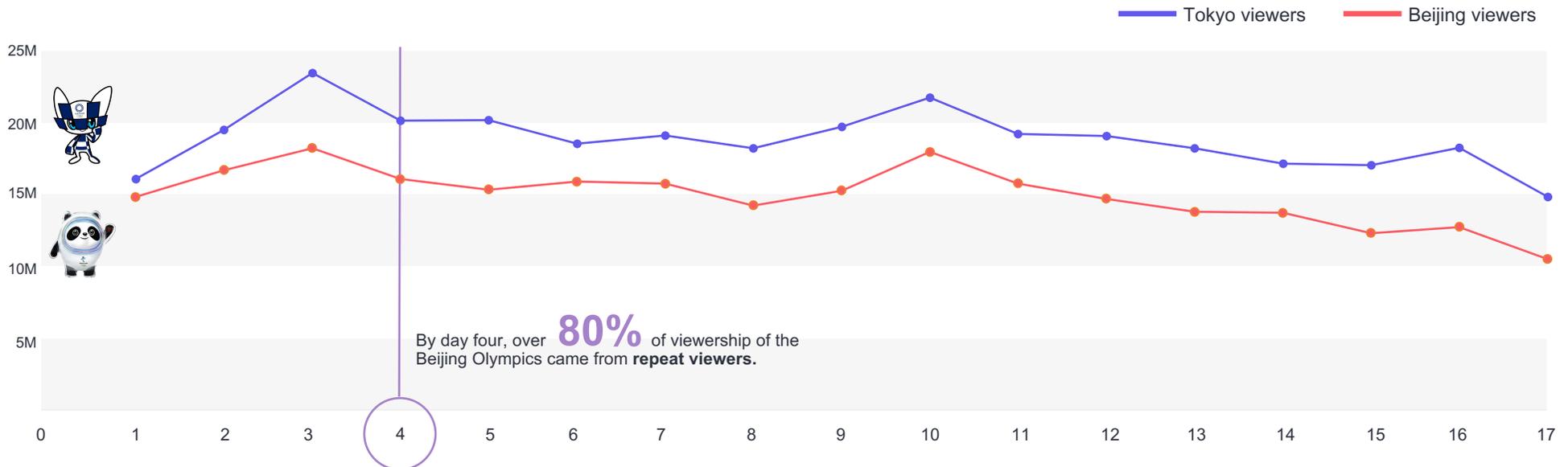
Total viewership of the Beijing Olympics was down 11% from Tokyo in 2021. The difference in viewership started out relatively small at -9% on day one, steadily increasing throughout the games to -34% on the final day. The top three events all had women competing, with alpine skier Mikaela Shiffrin's fall on the giant slalom taking the number one slot and Chloe Kim's gold-medal winning halfpipe run at number three.



### ▶ Top 3 highest reaching Olympic events



### ▶ Daily household reach of Beijing 2022 vs. Tokyo 2020 Olympics

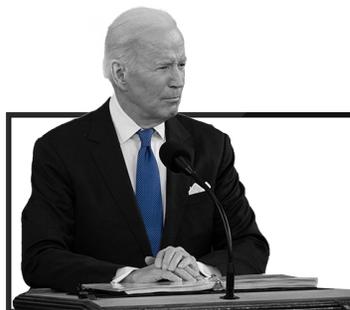


# Fewer households tuned in for Biden's 2022 State of the Union than Trump's 2020 address

Although white, older households were more likely to watch both the 2022 and 2020 State of the Union addresses than the average U.S. household, the rate at which white households over-indexed was higher for Trump's 2020 address than Biden's 2022 one. Conversely, the rate at which Black and Asian households under-indexed in 2022 was much less dramatic than it was in 2020. This suggests that Black and Asian viewers were more interested in hearing Biden's address than Trump's.

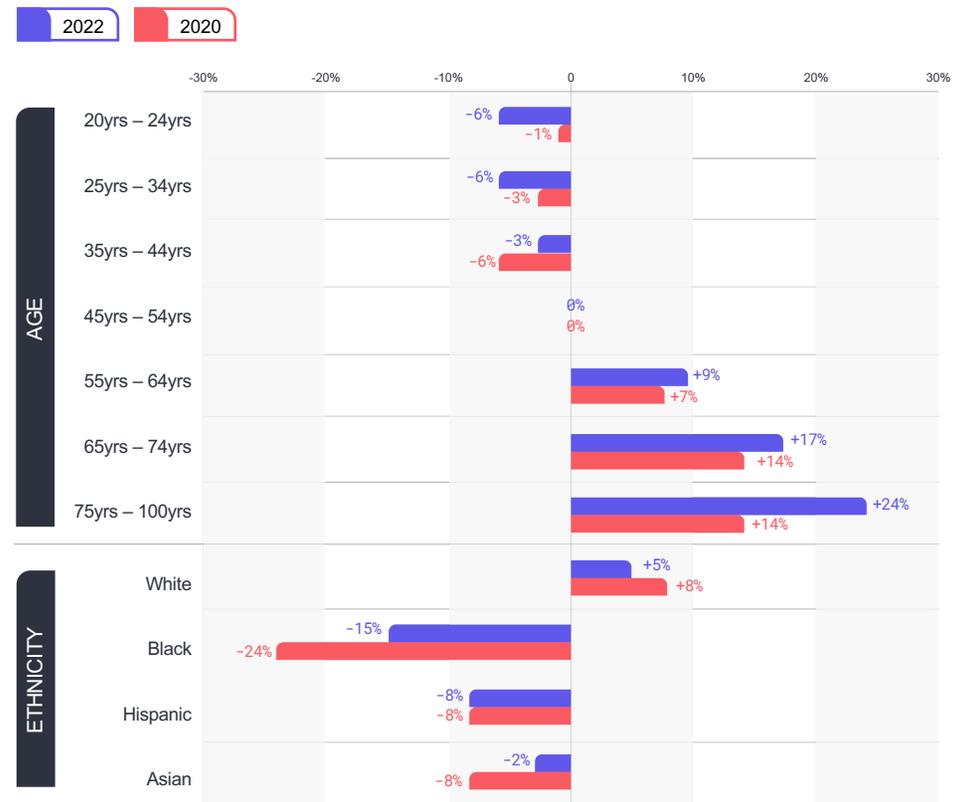


SOTU 2020 Trump



SOTU 2022 Biden

## ► Age and ethnicity, compared to to the U.S. overall 2022 vs. 2021



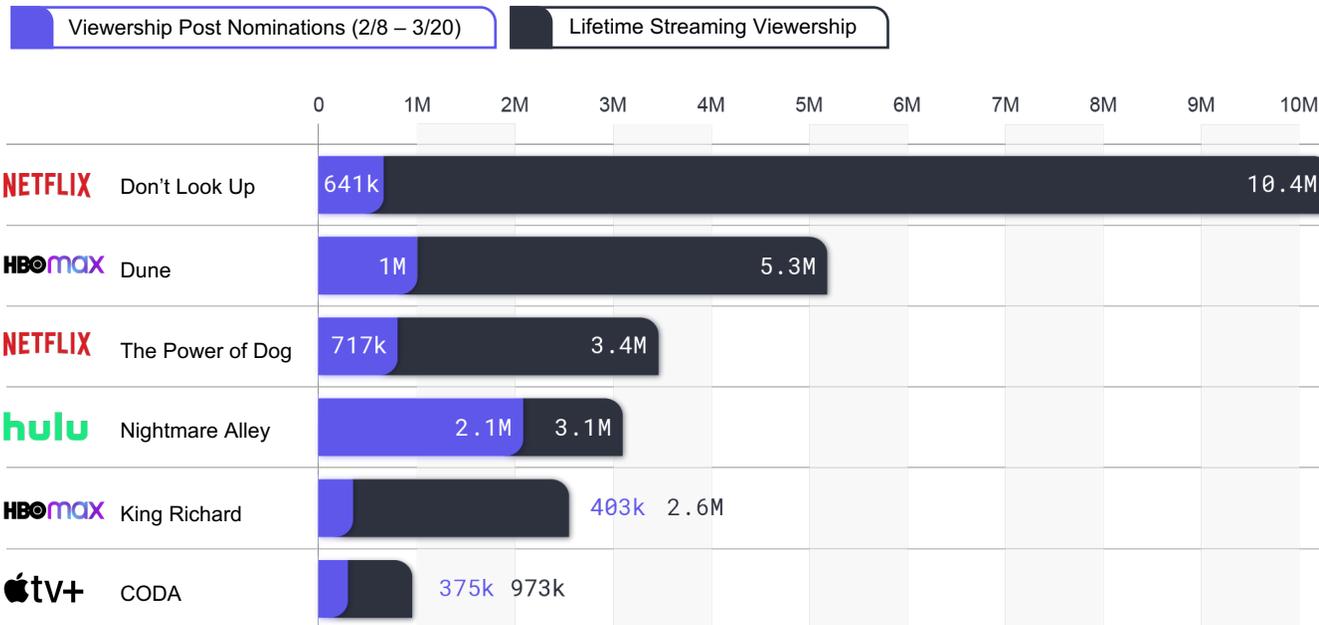
# Streaming viewership forecasts

## Oscars Best Picture winner CODA

The Academy Awards this year were groundbreaking in multiple ways, one of which was the ability viewers had to stream all of the Best Picture nominees prior to the event. Perhaps impacted by this, the Oscars saw a spike in viewership, with 11.5M U.S. households watching – up 32% from last year’s awards. Meanwhile, “the slap” brought in an additional 1.5M new households to catch the end of the show.

Of the Best Picture contenders that were available to stream at the time of nominations, the ultimate winner CODA saw the largest viewership increase after the initial Oscar ballots were released. Despite trailing in overall viewership there was significant fresh interest in the movie related to Oscars buzz, forecasting its ultimate victory.

### ► Viewership of best picture nominees pre and post nominations



# 11.5M

Oscars 2022 household viewership

# ↑ +32%

Year-over-year: 2022 vs 2021



## Advertising

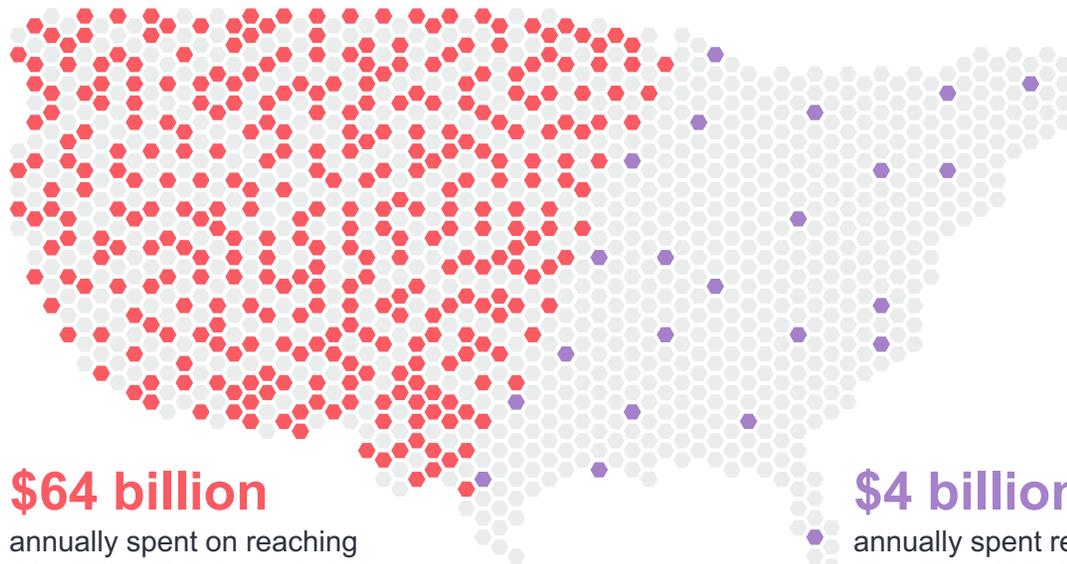
The vast majority of linear ad impressions reach - and oversaturate - the same half of TV viewers. Throughout the quarter, 94% of linear impressions were served to just 55% of viewers who maintained a high level of linear consumption. Moreover, linear advertisers are not reaching diverse, younger viewers effectively, with top advertisers consistently under-indexing based on ads served to Hispanic, Asian, millennial, and Gen Z audiences.

# Nearly half of all linear viewers watched only 6% of all ads in Q1

Data from the first three months of the year paints a clear picture of the challenge advertisers face driving incremental reach beyond traditional linear TV campaigns. In Q1 2022, 94% of all linear television ads reached the same 55% of audiences. These medium to high frequency TV viewers, who represent just about half of all linear household viewership, were bombarded with an average of 144 ads per day while the rest of America’s households were barely reached at all. The challenge advertisers face in reaching these light TV viewers, many of whom are younger, is real. For millennials in particular, who now represent nearly \$3 trillion in spending power, one in four households watched less than one hour of traditional TV per week. Overall, all households under age 45 were exposed to 24% fewer linear ads than older homes.

► **94%** of linear impressions reached **55%** of U.S. households  
Q1 2022

► **6%** of linear impressions reached **45%** of U.S. households  
Q1 2022



**\$64 billion**  
annually spent on reaching **64 million** U.S. households an average of **144 times** per day in Q1'22

**\$4 billion**  
annually spent reaching **51 million** U.S. households an average of **11 times** per day in Q1'22

**144**

---

Avg. number of linear ads seen per day by the **top 55%** of TV viewers

**11**

---

Avg. number of linear ads seen by the **bottom 45%** of TV viewers

# Insurance brands edge out retail among top advertisers, following the Q4 holiday push

The top three linear advertisers this quarter were all insurance brands, joined on the leaderboard by quick-serve restaurants along with tax and career services. TurboTax was a new addition this quarter, impacted by the early Q2 tax deadline.



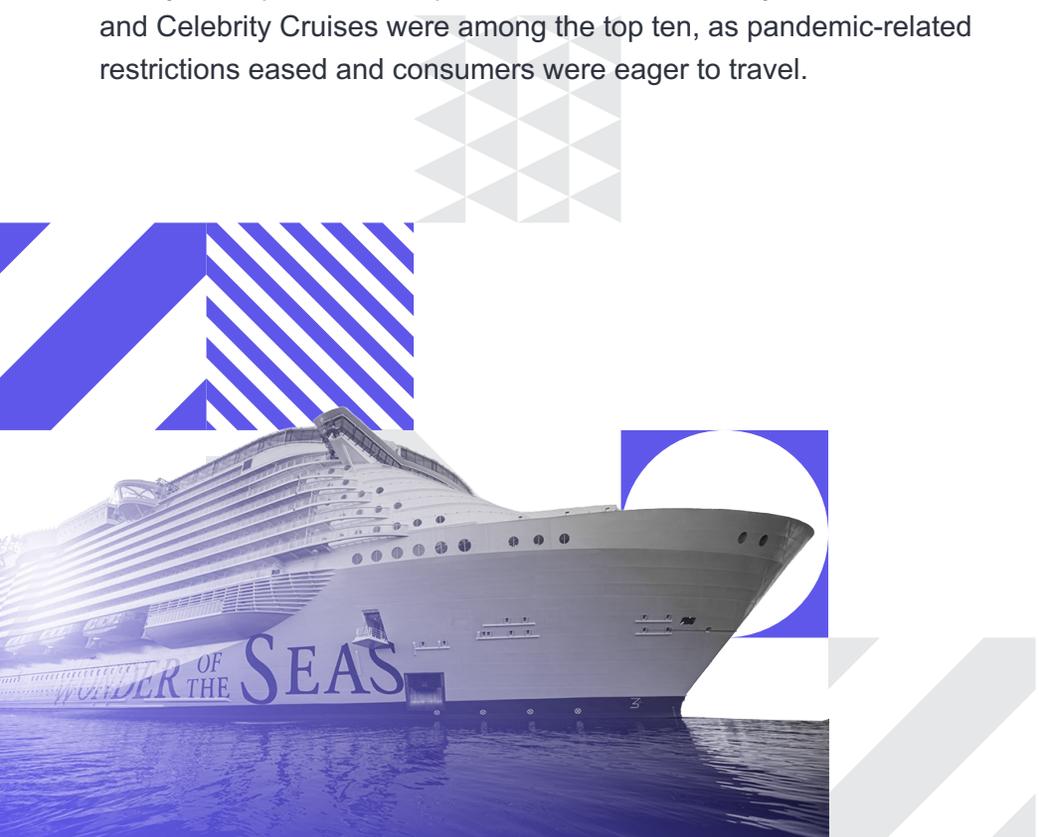
## ► Top advertisers by impressions Q1 2022

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

# Online and app-based brands show strong year-over-year growth, along with travel companies

Online companies are upping their ad game on linear, with Tally, Upgrade, Angi, and Betterhelp all driving strong year-over-year increases in impression count. Among the online and app-based companies, lenders and neobanks made a particular splash ahead of tax season, ranking among the brands with the highest increases based on year-over-year growth.

Consistent with Q4 2021, travel advertisers also saw upticks in year-over-year impressions. In particular, cruise lines Royal Caribbean and Celebrity Cruises were among the top ten, as pandemic-related restrictions eased and consumers were eager to travel.

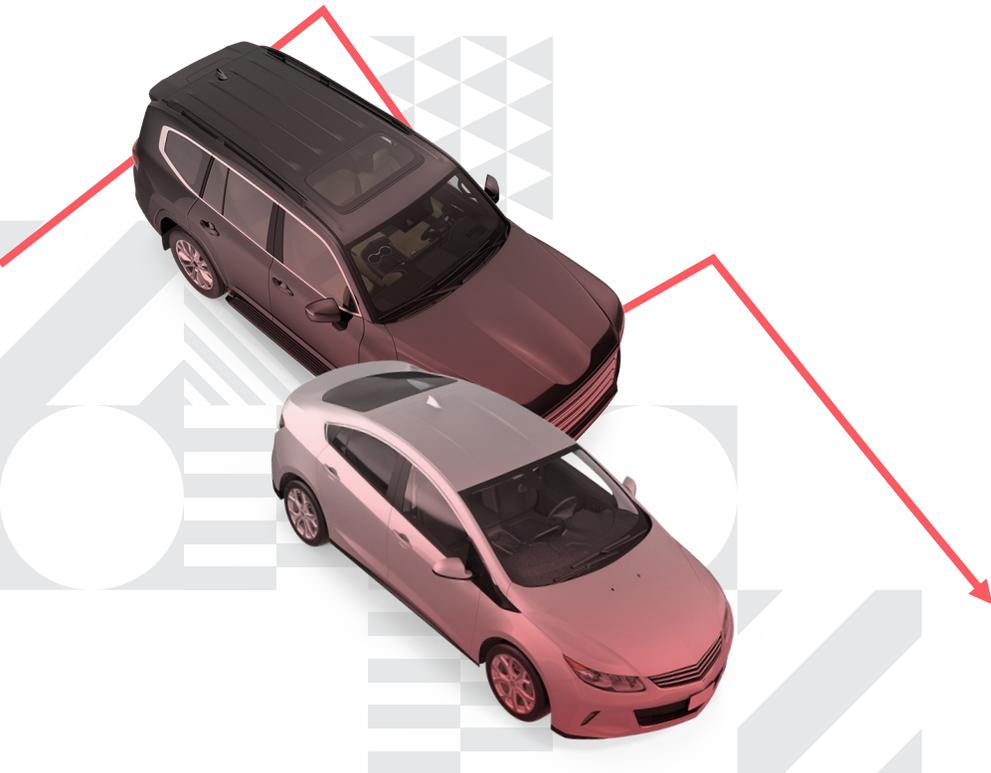


## ► Top advertisers by growth

	Year over Year Q1 2022 vs. Q1 2021	Quarter over Quarter Q1 2022 vs. Q4 2021
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		

# Declining sales lead automakers to put the brakes on advertisements

With automakers reporting U.S. new car sales [down 14%](#) in Q1 2022, the dual challenges of chip shortages and rising interest rates appear to have cooled the U.S. auto market significantly. Advertising budgets have followed suit with eight of the top ten automotive advertisers serving a lower number of impressions during the first quarter of the year. Some automakers are marketing into the downturn with both Toyota and Jeep increasing spend from one year ago.



## ► Top automotive advertisers by impressions Q1 2022

Q1 2022 vs. Q1 2021

1	 <b>TOYOTA</b>	+19%
2	 <b>CHEVROLET</b>	-18%
3	 <b>LEXUS</b>	-3%
4	 <b>HYUNDAI</b>	-4%
5	 <b>NISSAN</b>	-23%
6	 <b>Ford</b>	-46%
7	 <b>SUBARU</b>	-34%
8	 <b>KIA</b>	-5%
9	 <b>GMC</b>	-1%
10	 <b>Jeep</b>	+18%

# Top advertisers over-index among white and Black viewers, while under-indexing across Hispanic and Asian viewers

Advertisers looking to reach a diverse audience may want to reassess their effectiveness at reaching these key groups. Even the brands that serve the highest number of impressions aren't reaching Hispanic and Asian audiences at a proportional rate.

Focusing on Hispanic households in particular, the discrepancy in ad viewership and the census is stark. According to the [Hispanic Marketing Council](#), only 6% of overall industry investment is spent toward the Hispanic community, despite Hispanic people comprising about [18% of the U.S. population](#) - highlighting the need for advertisers to ensure their ads are reaching each group proportionally.

► **Percentage of linear impressions served by ethnicity among top 10 advertisers, compared to the U.S. overall**  
Q1 2022

**None** of the top three linear advertisers served over **13%** of impressions to Hispanic households, despite Hispanic people comprising **18%** of the U.S. population.



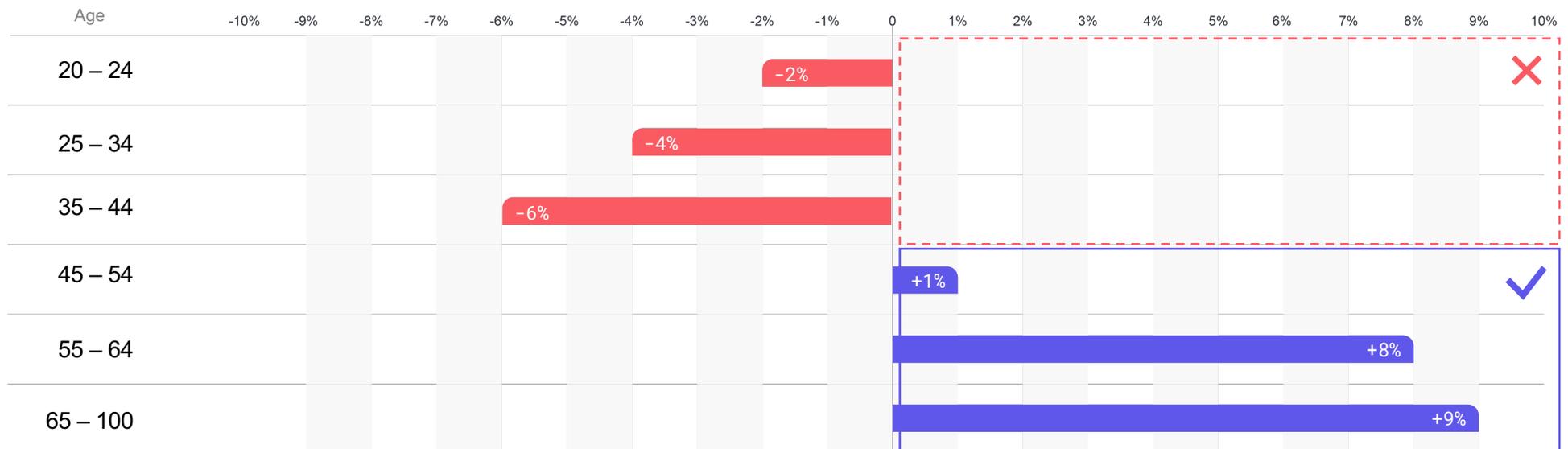
# Advertisers struggle to reach Gen Z and millennial audiences on linear, while older viewers are over-saturated

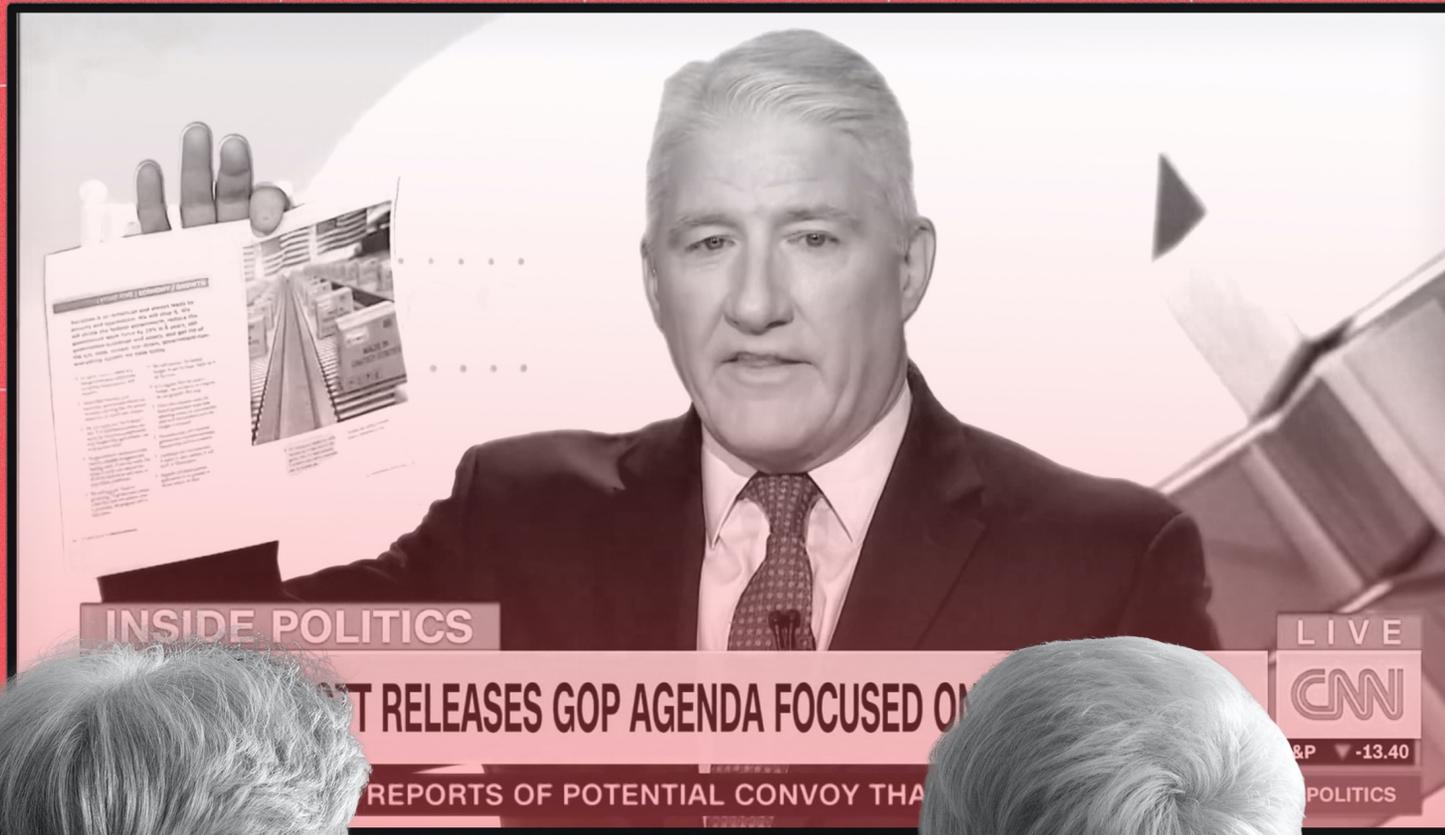


Each of the top 10 advertisers in Q1 2022 served a disproportionately low number of impressions to audiences below the age of 44, while over-indexing among audiences over the age 45. This underweighted engagement is caused by two correlating forces. First of all, households under the age of 45 cord-cut and cord-shave at high rates, with one in four millennial households only watching one hour of linear TV per week. A second compounding factor for advertisers seeking to reach younger households with higher disposable incomes is that even for those that watch linear television, the total time spent in a traditional TV environment is a fraction of what older homes spend, causing households under 45 to be exposed to 24% fewer linear ads than older homes throughout the quarter. Advertisers looking to reach incremental Gen Z and millennial audiences need to reach beyond linear TV and develop a unified approach to the entire content ecosystem these generations now consume, from linear to streaming, to social and mobile.

► **Percentage of linear impressions served by age group among top 10 advertisers, compared to the U.S. overall**

Q1 2022



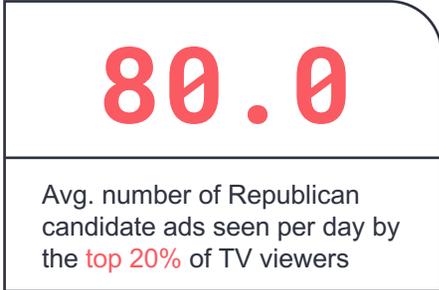
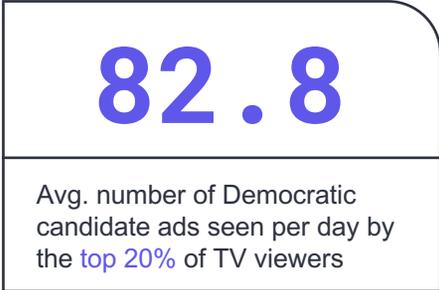


## Politics in Focus

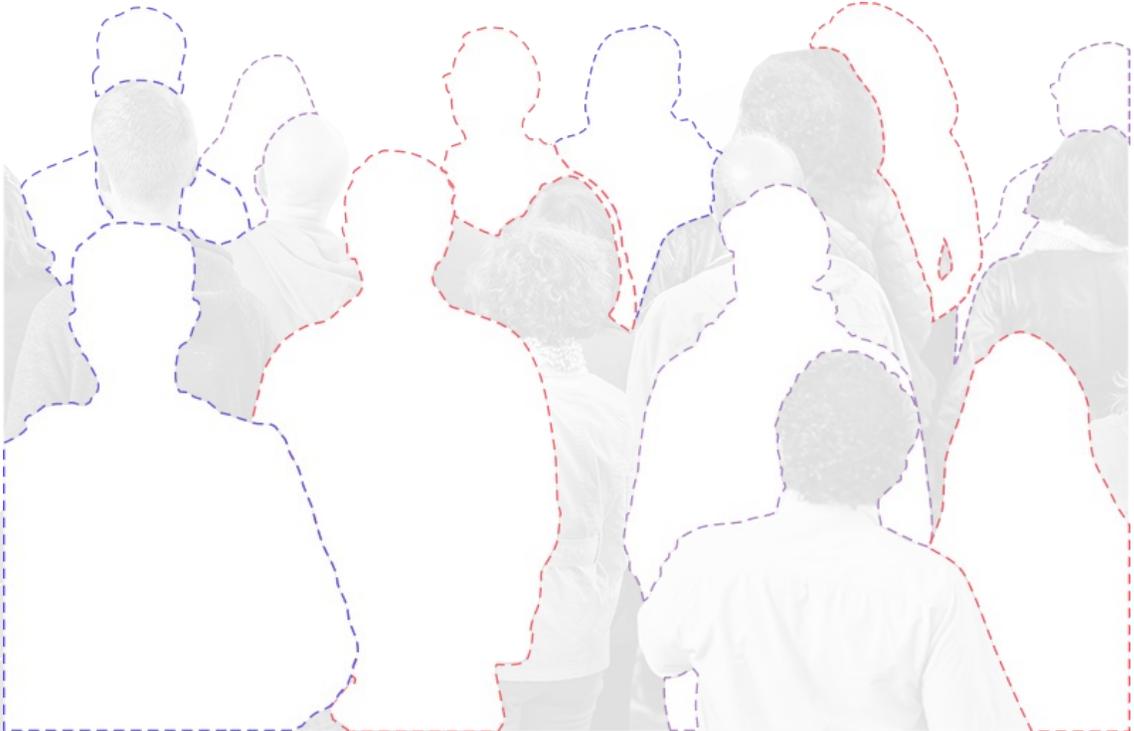
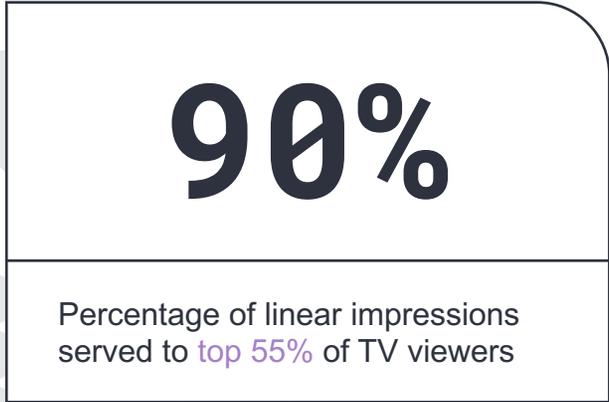
With the 2022 midterm elections coming up, political advertisers must think strategically about how to reach their audiences. Samba TV data has shown that political spend on linear often goes wasted, reaching and oversaturating the same audiences. Meanwhile, conservative viewers show a strong affinity for Paramount+ programming, while liberal viewers prefer big city based content across multiple platforms.

# Political advertisers are missing millions of key voting households

In partnership with several major political ad buying firms, Samba TV has provided a glimpse into the challenge facing political advertisers in the 2022 midterms as campaigns struggle to reach undecided voters. Looking at just one Senate battleground state from 2020, Samba TV’s analysis found that 90% of all linear ad impressions reached the same 55% of households. Neither party fared any better than the other, with both candidates bombarding the same 55% of voters with advertisements, while failing to reach the remaining 45% of households. With estimates claiming 2022 will be another record year for political ad spending, identifying incremental audiences across every screen will be a major priority.

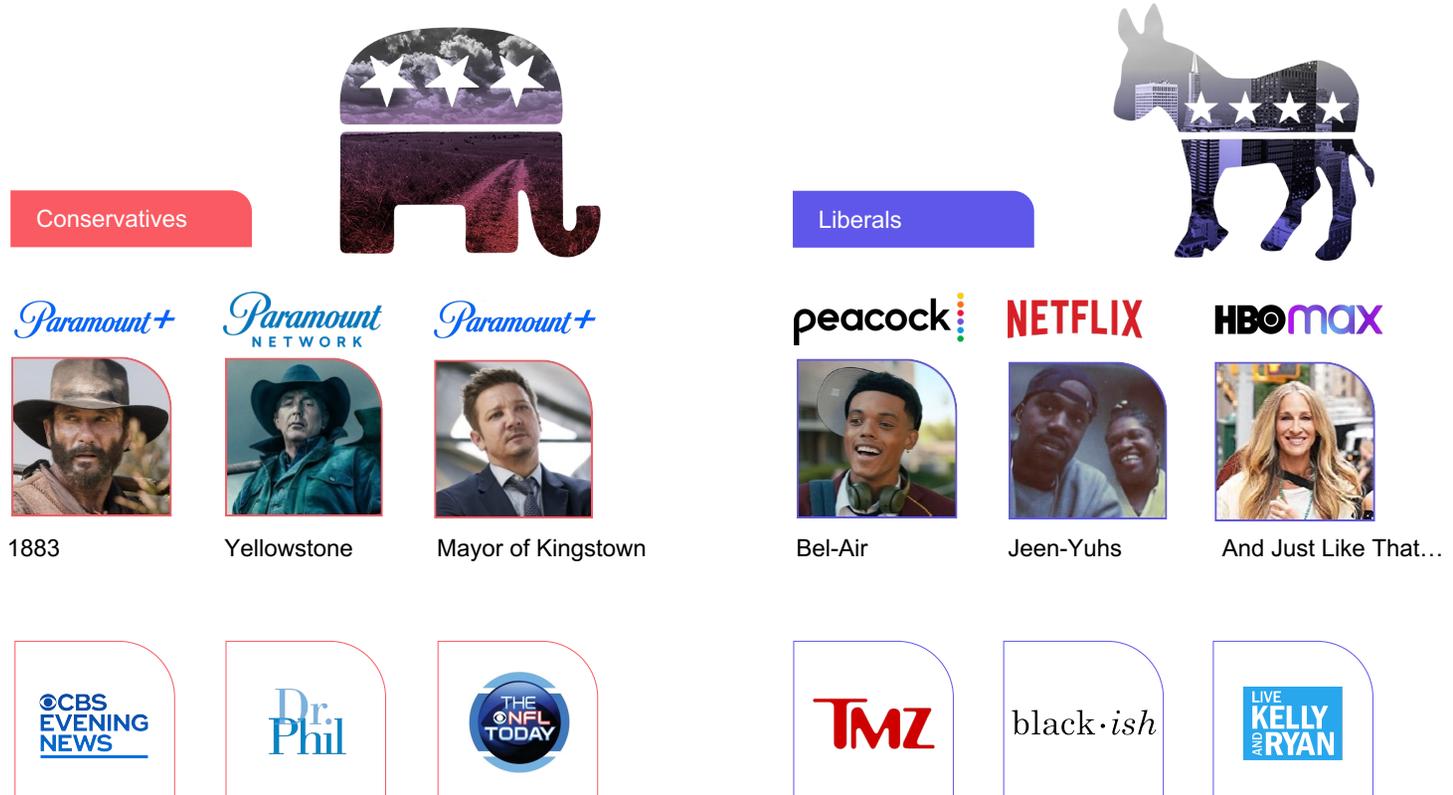


- ▶ **Percentage of linear impressions served to top 55% of TV viewers across both Democratic and Republican candidate campaigns**  
[2020 Senate battleground race October linear TV campaigns](#)



# Conservatives watch rural-oriented Paramount+ shows, while liberals prefer big city based shows across multiple OTT platforms

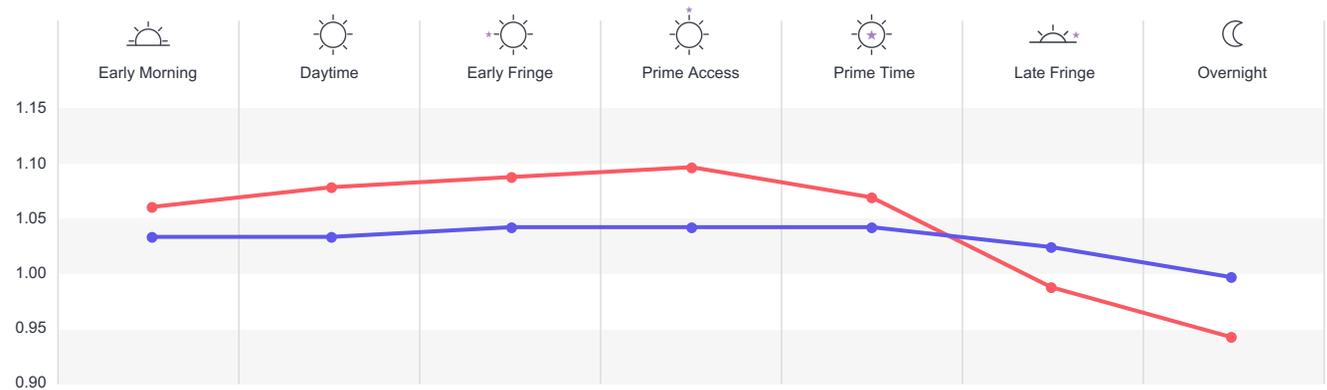
Yellowstone and its prequel 1883 were hits among conservative households, along with talk shows on linear. Liberal households favored content featuring diverse leads across both streaming and linear, such as Bel-Air, Jeen-Yuhs, and black-ish.



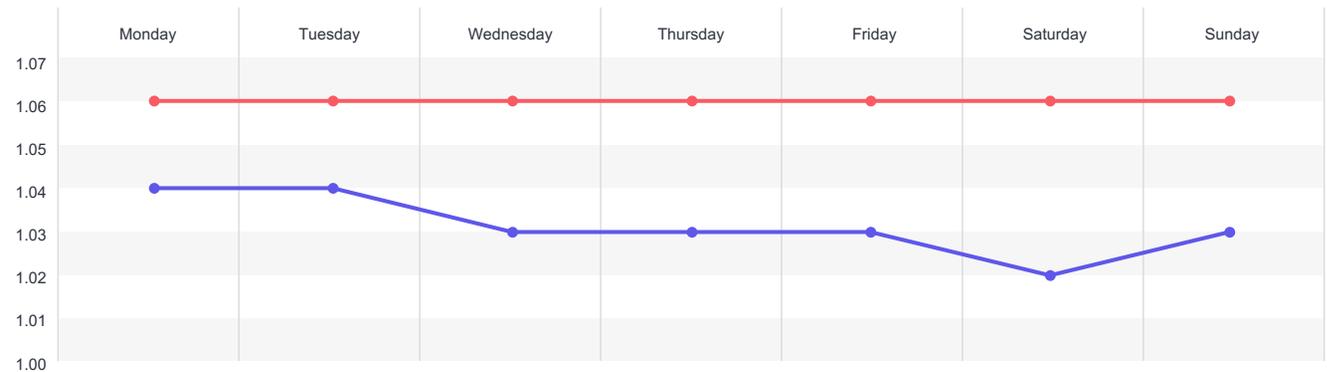
# Liberals are less likely than conservatives to watch TV on the weekends, while conservatives turn the TV off late at night

Political advertisers looking to reach conservative households should consider flying ads during the daytime, early fringe, and prime access dayparts, when conservative viewers are more likely than the average American to be watching TV. The day of week had little impact on conservative viewership, with over-indexes seen across the board. On the other hand, liberal viewers were most likely to watch TV on Monday and Tuesday, while skipping TV time on the weekends, while consumption across dayparts was steadier.

► Consumption index by daypart: **liberals** vs. **conservatives**  
Q1 2022



► Consumption index by day of week: **liberals** vs. **conservatives**  
Q1 2022



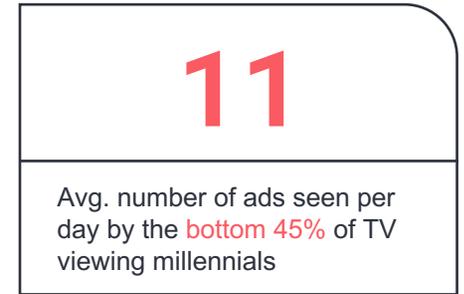
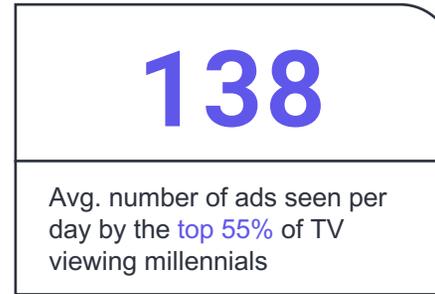


## Consumer Snapshots

Samba TV's data offers comprehensive demographics including age, income, and ethnicity, all mapped to U.S. Census data to give you the strongest audience representation to reach target audiences. So where are key groups tuning-in to linear and streaming, and what advertisers are doing a good job of reaching them? We took a look at a few demographic and behavioral groups to help you understand their habits.

# Millennials love Netflix, but still watch live sports on linear (for now)

When it comes to streaming, the generation that invented “Netflix and chill” continues to do just that – with two Netflix series in the top spots. While millennials have cut the cord faster than older generations, with one in four millennial households watching less than one hour of linear per week, sports programming continues to drive linear TV viewership. However, with more live sports moving to streaming, this is likely to shift in coming years.



► **Top 3 indexing streaming programs**

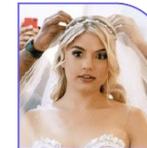
Q1 2022

**NETFLIX**



Jeen-Yuhs

**NETFLIX**



Love is Blind

**peacock**



Bel-Air

► **Top 3 indexing linear programs**

Q1 2022



SPORTSCENTER



► **Top advertisers by percentage of impressions served to segment**

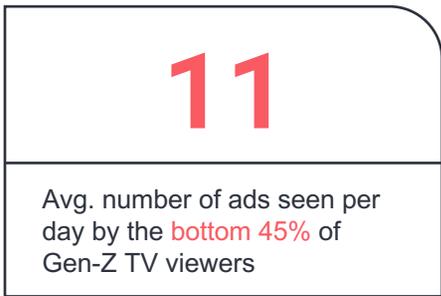
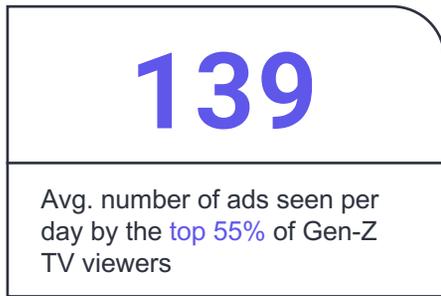
Q1 2022



# Budget-conscious advertisers target **Gen Z**

With Gen Z adults entering the workforce and starting to spend, advertisers should target this emerging demographic using a tailored cross-screen approach to reaching this cord-cutting audience. Top advertisers include free credit app Credit Karma, low-cost wireless plan Cricket, and DIY orthodontics Smile Direct Club.

While it may be surprising to see linear TV network TNT in the top five advertisers for a demo known for largely forgoing cable, the network has made a play for this younger audience with the addition of All Elite Wrestling and adding some younger faces to their NBA commentary. When it comes to streaming, Gen Z isn't loyal to any one streamer. Instead, series with diverse leads drive tune-in.



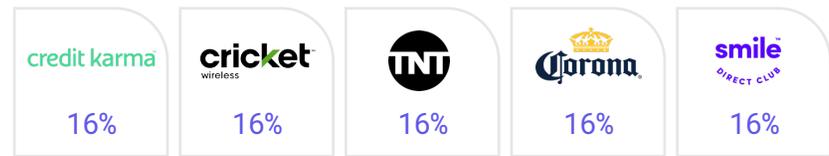
► **Top 3 streaming indexing programs**  
Q1 2022

<b>HBOmax</b>	<b>NETFLIX</b>	<b>NETFLIX</b>
		
Euphoria	All of Us Are Dead	Good Girls

► **Top 3 indexing linear programs**  
Q1 2022

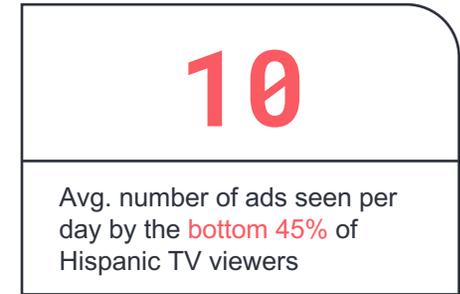
	SPORTSCENTER	
---	--------------	---

► **Top advertisers by percentage of impressions served to segment**  
Q1 2022

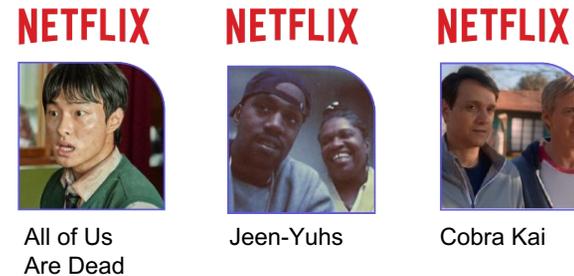


# Advertisers make a play for the growing **Hispanic** demographic

The Hispanic demographic continues to grow and, with it, advertiser interest. On streaming, Netflix leads the way among Hispanic viewers, with all three of the highest indexing programs from the streaming giant. Want to reach these ad-free viewers on linear? Spanish reality series Enamorandonos, celebrity news show TMZ, and NBA Basketball are the highest indexing linear programs for the demo. Brands like Tylenol and Target top the list of highest-indexing advertisers with campaigns that authentically connect to Hispanic audiences.



► **Top 3 streaming indexing programs**  
Q1 2022



► **Top 3 indexing linear programs**  
Q1 2022



► **Top advertisers by percentage of impressions served to segment**  
Q1 2022



# Just one car maker tops auto intenders' advertisers

Mercedes-Benz is the only car maker to find itself in the top five advertisers for auto-intenders, although auto accessories brand, WeatherTech, tops the list. Apple and Fidelity also see a high percentage of impressions from this lucrative demographic. When it comes to streaming viewership, this audience is drawn to programming led by women characters that depict an aspirational lifestyle. On linear, weekly news program, 60 Minutes, edges out sports for the top spot.



143

Avg. number of ads seen per day by the top 55% of TV viewing auto-intenders

12

Avg. number of ads seen per day by the bottom 45% of TV viewing auto-intenders

► Top 3 streaming indexing programs

Q1 2022

NETFLIX



The Marvelous Mrs. Maisel

NETFLIX



And Just Like That

NETFLIX



Emily in Paris

► Top 3 indexing linear programs

Q1 2022



SPORTSCENTER



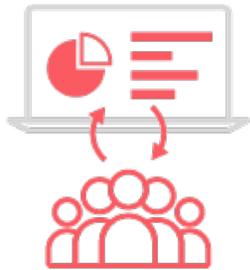
► Top advertisers by percentage of impressions served to segment

Q1 2022

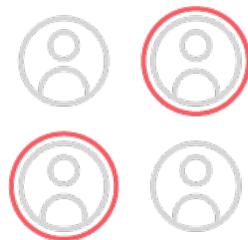


# TURNING INSIGHTS INTO ACTION

Data from the first three months of the year demonstrate the challenges advertisers face in ensuring every dollar of their campaign counts. With so much linear spend wasted on oversaturating the same half of TV viewers and so many key groups cutting the cord, advertisers must think outside the box to reach new audiences.



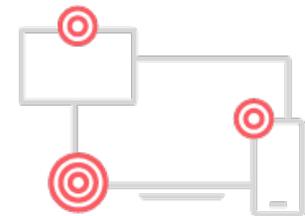
**Use first-party data to measure the true reach and frequency of your campaign**



**Tap into guaranteed incremental reach offerings to ensure you're reaching fresh audiences**



**Capitalize on flexible ad buys to remain nimble in the face of changing TV habits**



**Leverage identity solutions to reach your audiences across screens**



Samba TV gathers viewership data via its proprietary content recognition technology on opted-in Smart TVs, and through partnerships with leading cable television providers and their affiliates. Samba TV's insights are built on a comprehensive source of real-time viewership data across broadcast, cable, over-the-top, and digital media.

As is standard industry practice, we analyze our large proprietary dataset to project household-level TV viewership. We do not estimate viewership on non-TV devices, nor do we estimate co-viewing (number of people watching). For example, if someone watches Disney Plus via a mobile or web browser and casts that to their Smart TV, then our content recognition technology would capture that. We weight individual households in our dataset to create a research panel that we believe accurately represents viewership behaviors across geographies and demographics.