



TV'S 2019-20 PRIMETIME UPFRONT SCORES ANOTHER 5% AD REVENUE GAIN

Media Dynamics, Inc. releases preliminary estimates in advance
of their annual upfront and CPM-CPP reports

Nutley, NJ, August 8, 2019 - Now that the negotiations for primetime broadcast TV network 2019-20 upfront ad sales are effectively completed, and most cable deals finalized, we project an overall 5.4% increase in ad revenues, for a total of \$21.9 billion. As was the case last year, the broadcast TV networks performed strongly, gaining 5.7% in ad dollar increases, compared to cable's 5.1% increase; this is likely a reflection of growing concerns over cable's reach erosion due to continued cord cutting.

Table I

NATIONAL PRIMETIME TV UPFRONT AD SALES¹ 2008-09 to 2019-20 Seasons

	BROADCAST NETWORKS		CABLE		TOTAL	
	\$	% CHANGE	\$	% CHANGE	\$	% CHANGE
2008-09	9,160	-1.3	7,600	+4.8	16,760	+1.4
2009-10	7,745	-15.4	6,920	-9.0	14,665	-12.5
2010-11	8,630	+11.4	7,950	+14.9	16,580	+13.1
2011-12	9,220	+6.8	8,690	+9.3	17,910	+8.0
2012-13	9,390	+1.8	9,275	+6.7	18,665	+4.2
2013-14	9,085	-3.3	10,110	+8.9	19,185	+2.8
2014-15	8,680	-4.5	9,675	-4.2	18,355	-4.3
2015-16	8,360	-3.7	9,450	-2.3	17,810	-3.0
2016-17	8,750	+4.7	9,875	+4.5	18,625	+4.6
2017-18	9,105	+4.1	10,625	+7.6	19,730	+5.9
2018-19	9,630	+5.8	11,125	+4.7	20,755	+5.2
2019-20	10,180	+5.7	11,690	+5.1	21,870	+5.4

¹Gross ad spending; in millions.

Source: Media Dynamics, Inc.

Because of the anticipated attrition in average minute 18-49 and 25-54 ratings (due to mounting audience fragmentation), the average CPMs for primetime TV :30s will rise by about 11% next season, with the broadcast TV networks again surpassing cable in this regard.

Table II
ADULT VIEWER CPM TRENDS FOR
NATIONAL TV UPFRONT BUYS¹
 2008-09 to 2019-20 seasons

	BROADCAST NETWORKS		CABLE	
	CPM	% CHANGE	CPM	% CHANGE
2008-09	\$16.80	+2.5	\$9.17	+8.0
2009-10	16.09	-4.2	8.74	-4.7
2010-11	17.52	+8.9	9.60	+9.8
2011-12	19.48	+11.2	10.61	+10.5
2012-13	20.96	+7.6	11.31	+6.6
2013-14	22.32	+6.5	12.09	+6.9
2014-15	23.46	+5.1	12.77	+5.6
2015-16	24.40	+4.0	13.34	+4.5
2016-17	26.86	+10.1	14.61	+9.5
2017-18	29.01	+8.0	15.94	+9.1
2018-19	31.97	+10.2	17.49	+9.7
2019-20	36.19	+13.2	19.45	+11.1

¹30-second commercials.

Source: Media Dynamics, Inc.

Media Dynamics, Inc. President, Ed Papazian, noted that the continued strength of national TV—especially the broadcast TV networks—is largely a function of advertiser disenchantment with digital video platforms, though spending on digital is also on the rise. “So far, national advertisers are playing it safe by sticking with linear TV,” Papazian points out, “but the picture may change dramatically if alternative forms of TV/video can attain greater audience scale, provide more quality content and deal with ad viability and fraud issues.”

[TV Dimensions 2019](#) and [MDI Direct](#) subscribers will receive a more detailed report on the 2019-20 upfront, including three-decade trends and breakdowns for each of the broadcast TV networks in the August 13th issue of [TV Dimensions Alert](#). MDI’s proprietary upfront CPM-CPP estimates will be released August 21st in the annual [ACES](#) report, followed by [CPMTrack](#) in mid-September.

About Media Dynamics, Inc.

[Media Dynamics Inc.](#) is a publishing & consulting company founded in 1982 by Ed Papazian, the former Media Research Director and Media Director of BBDO (1960-75) and co-creator/publisher of **Ad Forum** and **The Media Cost Guide**. MDI’s **Dimensions** series has served as *the* reference source for data trending and insights on radio, magazines, TV and intermedia. Media Dynamics’ library includes several research annuals and numerous special reports and white papers that focus on targeted areas of the media, e.g. spot TV, cable, ad receptivity, CPMs and upfront cost estimates. Media Dynamics, Inc. has also spent more than 20 years consulting on various media issues, including agency/client interactions on the media function, the hiring of independent media buying services and the evaluation of agency/media buying performance. Past clients include a cross section of TV networks, cable services, magazines, TV & radio reps, advertisers, ad agencies, research companies and new media.