

TABLE OF CONTENTS

I. Basics	1
Penetration & Access Trends	3
Growth Of TV Penetration: 1950-2016	5
U.S. TV Home Platform Use And Device Ownership	6
Device Penetration In TV Households: 2011-16	7
Trends In Adult Smartphone And Tablet Ownership: 2010-16	8
U.S. Adults Who Own Tablets And Smartphones By Demographics	9
Channel Availability	10
Distribution Of Channels Receivable Per TV Home: Early-1950s To Mid-2010s	11
How Many Channels Do We View?	12
Trends In Weekly Viewing, Channels Viewed & Time Spent Per Channel:	
Early-1950s To Mid-2010s	14
Average Adult Exposure To TV Program Sources Over Extended Time Frames	15
What's The Score On Unbundling?	16
Average Number Of TV Channels/Services Viewed Per Adult By Program Source	19
Trends In Channel Availability, Total TV Viewing Time & Primetime Ratings:	
Early-1970s To Unbundled 2020	20
General Viewing Trends	21
Trends In Household Set Usage By Daypart: Early-1950s To Mid-2010s	22
Trends In The Composition Of TV's In-home Audience: Early-1950s To Mid-2010s	23
The Rise Of The Solitary Viewer	24
Solitary Viewing Trends For Persons Aged 2+: Early-1950s To Mid-2010s	25
Proportion Of TV Viewers Watching By Themselves: Mid-1950s To Mid-2010s	26
Emerging Alternative TV Platforms	27
Monthly Reach Of TV/Video Platforms: 2011-16	29
Trends In Average Adult Daily Use Of Viewing Options: 2012-16	30
Average Weekly Time Spent With TV/Video Platforms By Age	31
Average Daily TV/Video Adult Audience By Platform	32
Average Daily Adult Audience Of TV/Video Platforms By Age	33
Enter SVOD	34
U.S. TV Homes Accessing SVOD Services: 2010-16	39
Average Minutes Of Daily TV/Video Viewing Per Adult	40
 II. The Business Of Television	 41
TV Ad Revenue Trends	43
Estimated Gross TV Ad Revenues By Type Of Placement: 1950-2016	45
Trends In TV Network, Cable & Barter Syndication Ad Revenues: 1980-2016	46

Continued→

Local Market TV Ad Revenues: 2004-16. 47

Estimated Share Of Ad Revenues And Ad Impressions By TV Platform 48

Upfront Analysis 49

Estimated Upfront TV Primetime Sales: 1990-91 To 2016-17 Seasons 50

Trends In Broadcast TV Network Upfront Primetime CPMs And Ad Dollars:

 2005-06 To 2016-17 Seasons 51

Nationally Bought Primetime Ad Dollars Placed In Upfront Buys:

 1980-81 To 2016-17 Seasons 52

Estimated National TV Upfront Primetime Ad Dollar Sales: 1990-91 To 2016-17 Seasons . . . 53

Upfront CPM Comparisons By Daypart. 54

 2016-17 Season Upfront CPM Estimates By Daypart & Demographics For Broadcast,
 Syndication & Cable 56

Adult Primetime Upfront CPM Trends By Age: 2007-08 To 2016-17 Seasons 57

Women Monday-Friday Daytime Upfront CPM Trends By Age:

 2007-08 To 2016-17 Seasons 58

Adult Monday-Friday Early Evening Upfront CPM Trends By Age:

 2007-08 To 2016-17 Seasons 59

Adult Monday-Friday Late Evening Upfront CPM Trends By Age:

 2007-08 To 2016-17 Seasons 60

Is TV's Upfront Still Necessary? 61

How TV Makes Its Profits 67

 Estimated TV News Revenues & Profits By Platform 71

Programmatic Time Buying For TV? 72

The Realities & Myths Of "Addressable TV" 77

Changing TV Commercial Lengths. 82

 Trends In National Advertiser Brands & Commercial Length: 1965-2016 83

TV Program Production Costs. 84

 Estimated Production Costs For Broadcast Network Primetime Fare: 1955-2016 86

Product Placement 87

 Estimated U.S. TV Product Placement Paid Ad Spending: 1970-2016. 89

TV Commercial Production Costs 90

 Average Production Cost For A Nationally Aired :30 TV Commercial: 1965-2016. 91

III. TV's Audience Dynamics. 93

Program Sources & Ratings Erosion 95

 Erosion Of ABC/CBS/NBC Ratings: 1970-2016 96

 Share Of Weekly Linear TV Usage By Program Source: Early-1950s To 2016 97

 ABC/CBS/NBC Network Share Of Linear TV Household Audiences By Daypart:

 Fall 1950-2016 98

How Much TV Do We Consume? 99

 Profile Of The Resident U.S. Population By Age: 1950-2016. 101

Continued →

Profile Of The Heaviest Linear TV Adult Viewing Quintile By Age & Income: 1950-2016 . . . 102

Average Adult Weekly TV/Video Viewing Time In Hours By Method Of Access 103

Away-From-Home Audiences 104

 Location Of Live TV Viewing: 1950-2016 105

 Average Telecast Adult Audience Added To Live Plus Delayed Exposure By OOH Viewing. . 106

 Demographic Profile Of The Adult Live TV Audience By Location. 107

Reassessing How TV Builds Its Reach 108

 How Broadcast Network Primetime Shows Develop Adult Reach & Frequency 111

 How Monday-Friday Shows Develop Adult Reach & Frequency. 112

 How Combinations Of TV Networks & Stations Develop All Daypart Adult Reach 113

 Reach Of Linear TV By Daypart For Adults/Men/Women By Age:

 One Day To Three Months. 114

 Adult 4-Week Reach Estimates For Broadcast Network Primetime Buys 117

 Adult 4-Week Reach Estimates For Six TV Dayparts 118

IV. TV Program Appeals. 119

 Overview. 121

 Daypart Variables 123

 Relative Indices Of Adult TV Viewing By Daypart By Sex, Age & Household Income 124

 America’s Evolving TV Program Diet 125

 Estimated Allocation Of U.S. Linear TV Set Usage By Program Genre:

 Early-1950s To 2016 127

 Hours Spent Weekly Viewing Linear TV By Program Genre For Select Demos 128

 Primetime Program Appeals 129

 Relative Indices Of Adult Viewing Of Primetime Broadcast Network TV Shows By Sex,
 Age & Household Income 130

 Daytime Program Appeals. 131

 Relative Indices Of Adult Viewing Of Monday-Friday TV Program Genres By Sex,
 Age & Household Income 133

 Fringe Evening Program Appeals. 134

 Relative Indices Of Adult Viewing Of Monday-Friday Fringe Evening Program Genres
 By Sex, Age & Household Income. 136

 Cable Program Appeals 137

 Relative Indices Of Adult Viewing Of Cable TV Program Genres By Sex,
 Age & Household Income 138

 TV Sports Appeals 139

 Typical TV Home Ratings For Sporting Events 140

 Demographic Profile Of Average Telecast Adult TV Sports Viewers. 141

 Median Age Analysis 142

 Median Age Of Average Primetime ABC/CBS/NBC Telecast Viewers: 1960-2016 144

Continued→

Median Age Of Average Telecast Primetime Viewers By Program Source & Genre 145

Median Age Of Average Telecast Viewers Of Daytime & Fringe Evening TV By
 Program Source & Genre 146

Median Age Of Average Telecast TV Sports Viewers 147

V. Viewer Involvement And Engagement 149

Overview 151

Viewer Attentiveness Research 152

 Findings Of 29 Primetime Viewer Attentiveness Studies: 1955-2000 156

 Fully Attentive Adult Viewer Ratios For Selected TV Program Genres 157

How Cable Shows Compare To Broadcast Network Shows In Viewer Liking
 & Emotional Connections 158

How Broadcast Network Shows Ranked By Q Score Among Adults 18+ 160

How Cable Network Shows Ranked By Q Score Among Adults 18+ 162

VI. How TV Ads Work 165

The Changing Commercial Viewing Environment 167

 How The Environment For In-Program Primetime Commercials Has Changed:
 1955-2016 169

How Many Commercials Do We Watch? 170

 National TV Content Devoted To Commercials: Early-1950s To Mid-2010s 173

 Average Hours Of TV Viewed And Commercial Exposures Per Adult Daily: 1950-2016 174

 Homes Tuned To TV Shows That Dial Switch Per 30-Second Period 175

 Drop In Audience From Program Content To National Commercials By Daypart
 And By Network/Cable Channel 176

 Summary Of 13 Studies Of Commercial Exposure: 1961-2000 178

 Estimated Average Commercial Exposure Factors By Daypart/Network Type/
 Program Genres 179

 Relative Indices Of Commercial Exposure By Position In Pod & Extent Of Clutter 180

How Do Audiences Respond To TV Commercials? 181

 How TV Ad Recallers Rated Commercials By Specific Attributes 185

 Relative Indices Of Positive Or Negative Attribute Ratings 186

 Average Recall And Persuasion Scores For 30-Second TV Commercials 187

 How TV Commercials Performed In Share-Of-Market Lift By Ad Impact Variables 188

 Viewer Recall Of 12 Commercials In Primetime TV Shows 189

 Average Number Of Daily TV Commercial Contacts Per Adult 190

How Long Does The Impact Of A Single Commercial Exposure Last? 191

 How Unaided Last Brand Recall Declined By Length Of Time After Exposure
 In Five Studies 193

 Increase In Share Of Sales For 19 Brands By Number Of Days Since First TV Exposure . . . 194

Continued →

TV Ad Campaign Wearout. 195

 Major Packaged Goods Brands Index Of Purchase Response By Frequency

 Of TV Ad Exposure In Week Prior To Buying Decision. 198

 Percent Shift In Commercial Recall After 1000 TRPs In TV Weight 199

Integrating Ad Performance Metrics 200

 Hypothetical Impact Of Very Successful, Average And Poor TV Ad Campaigns Over Time . . 202

TV Ad Campaigns As The Viewer Sees Them 203

Program Environment & Its Effects On Commercial Impact. 206

 How Primetime Network Shows Performed In Commercial Exposure And

 Last Brand Seen Recall. 209

 Index Of Recall Scores For Adult Primetime Viewers By Program Type 210

 Viewer Response By Program Involvement 211

 Relative Indices Of Last Pod Commercial Aided Recall. 212

 Average Commercial Minute Avoidance Rate For Broadcast TV Program Genres 213

 Program Viewers Able To Recall An Average Commercial By Program Genres. 214

TV Ad Campaign Awareness: How Many GRPs Does It Take? 215

 Actual Commercial Exposure Reach & Frequency Distribution Pattern

 For A 1000-GRP Schedule 220

 Estimated TV Ad Campaign Ad Awareness Levels At 100 And 1000 GRPs. 221

 How 23 Brand Commercials Built Awareness By GRP Levels 222

 How Brand Ad Awareness Builds By Adjusted GRP Levels 223

Interpretations & Implications 224

