

TV DIMENSIONS

I. BASICS

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This chapter covers all of the quantitative barometers of TV's performance, including how we access television content, the number of channels receivable and viewed per home, and our own exclusive estimates of channel usage by day, week, month and annually, including SVOD. We also take a long hard look at the implications involved in "unbundling," concluding that it might not be as good an idea as it sounds. The emergence of alternative viewing options is explored in considerable depth, with numerous datasets on PC, smartphone and tablet video usage, as well as the reach of such devices. SVOD is the subject of a major analysis, concluding with our latest projections of daily usage for Netflix, Amazon Prime and Hulu.

II. THE BUSINESS OF TELEVISION

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This chapter tracks TV's ad revenue trends and the primetime upfront, including our exclusive estimates for total spending, with breakdowns for each broadcast TV network since the 1990-91 season. Numerous CPM comparisons by demo are provided for the 2016-17 TV season and the previous ten years, along with a white paper reviewing the upfront process and why it is still necessary. The chapter also describes how TV makes its profits, including mounting revenues from non-advertising sources, and explores the many promises and pitfalls of programmatic time buying and "addressable TV."

III. TV'S AUDIENCE DYNAMICS

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TV's massive reach, as well as its continuing rating fragmentation are highlighted in this chapter. Also included are profiles of heavy viewers, going back to 1950; the amount of time we spend with various program sources by age and income; new TV reach tables, with an explanation of why they are needed; and an updated report on the reach potential for individual TV shows, TV networks and cable channels. This is an exclusive Media Dynamics, Inc. report including reach estimates for combinations of broadcast TV networks and cable channels based, in part, on newly obtained data.

IV. TV PROGRAM APPEALS

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What types of TV program content do Americans watch? How does this vary by sex, age and income? The answers in an exclusive Media Dynamics, Inc. analysis may surprise many. In addition, a detailed profile of adult TV viewing by daypart and all major program types is provided, including sports.

V. VIEWER INVOLVEMENT & ENGAGEMENT

Summarizes the findings of many viewer attentiveness studies, which reveal major differences in audience engagement by daypart and program genre. One highlight is a listing of 29 primetime viewer attentiveness studies utilizing methods as diverse as cameras, "spies," heat sensors and specially-formatted viewer diaries to obtain their answers.

VI. HOW TV ADS WORK

A major analysis of the changing TV viewing scene, with rising commercial clutter, many more brands to recall, the availability of remotes and DVRs, and the rise of solitary viewing all playing a role in making the advertiser's task—of exposing their messages to consumers—far more difficult. Another exclusive report is also included, which estimates how many TV commercials a typical adult is exposed to daily, how many are recalled, how TV ads generate a response, and the effects of campaign wearout. Finally, we present our exclusive formula for estimating the degree of ad awareness a TV campaign can generate at various GRP levels.
