

TABLE OF CONTENTS

CHAPTER ONE: AUDIENCE BASICS	1
I. Time Spent Trends	3
Daily Per Capita Hours of Media Usage for the U.S. Adult Population: 1945-2017	5
Trends in Average Adult’s Daily Time Spent with Five Media by Location of Exposure: 1945-2017	6
II. Time Spent by Demographics	7
Average Adult’s Daily Media Consumption Rates by Age and Household Income	8
III. How Individual Media Develop Reach	9
Adult Reach of Electronic and Print Media: Average Minute to Annual Total	11
Adult 18-34 Reach of Electronic and Print Media: Average Minute to Annual Total	12
Adult 55+ Reach of Electronic and Print Media: Average Minute to Annual Total	13
IV. Media Reach Tables	14
Four-Week Adult Reach Estimates for Dispersed Broadcast TV Network Primetime Buys	16
Four-Week Adult Reach Estimates for TV by Daypart at Various GRP Levels	17
How a Multi-Station Radio Buy on Average Rated Stations Builds Reach	18
Daily, Weekly and Monthly Reach Attainment by Target GRP Levels for Five Media	19
V. Cross Platform Reach Metrics	20
Reach Estimates of Magazine & TV Buys Among Target Groups Divided into Nine Demo Cells	24
Four-Week TV Reach Adjustment Factors	25
Four-Week Intermedia Reach Adjustment Factors	26
VI. Timing & Location of Audiences by Medium	27
Average Adult Audiences for Media Vehicles by When Reached	28
VII. Demographic Selectivity within Media	29
Relative Indices of Adult TV Viewing by Sex, Age & Household Income for TV Dayparts/Genres	30
Relative Indices of Adult TV Sports Viewing by Sex, Age & Household Income	31
Relative Indices of Adult Radio Listening by Sex, Age & Household Income	32
Relative Indices of Adult Usage of Digital, Print and OOH Media by Sex, Age & Household Income	33

CONTINUED —>

CHAPTER TWO: COST EFFICIENCIES 35

- I. Cost-Per-1000 Comparisons Across Media 37
 - Estimated CPMs for Adults/Men/Women by Age & Household Income for TV :30s on Broadcast, Syndication, Cable & Spot by Dayparts 39
 - Estimated CPMs for Adults/Men/Women by Age & Household Income for Radio, Digital & Print Media. 42
- II. Cost-Per-Rating Point Analysis 45
 - Cost-Per-Rating Point Estimates for Adults/Men/Women by Age & Household Income for TV :30s on Broadcast, Syndication, Cable & Spot by Dayparts 47
 - Cost-Per-Rating Point Estimates for Adults/Men/Women by Age & Household Income for Radio, Digital & Print Media. 50

CHAPTER THREE: AD EXPOSURE, RECALL & RECEPTIVITY 53

- I. What Measurements Do We Have? 55
- II. Ad Exposure Levels by Medium 59
- III. Ad Recall 61
 - Ad Viewability Rates for Digital Ads by Type 64
 - Relative Indices of Digital Ad Visibility/Ad Recall by Placement and Executional Variables 65
 - Estimated Ad Exposure and Ad Recall Levels for Seven Media Platforms. 66
- IV. Ad Receptivity 67
 - Average Product User/Buyer Penetration and Ad Receptivity Ratio by Select Demos 72
 - Examples of Products/Services with Highest and Lowest Ad Receptivity. 73
 - Relative Indices of Ad Receptivity by Demos within Product User Groups. 74
 - Average Brand Ad Awareness Among Product Users by Ad Receptivity. 75
- V. How Many Ads Are We Really Exposed To? 76
 - Daily Per Capita Hours of Commercial Media Usage for the U.S. Adult Population: 1945-2017 79
 - Average Adult’s Potential Daily Ad Exposures: 1945-2017 80
 - Average Adult’s Actual Daily Ads Noted: 1945-2017 81

CHAPTER FOUR: CROSS PLATFORM METRICS 83

- I. Comparable Cross Platform Metrics: An Introduction 85

CONTINUED —>

- II. TV/Video Currency Metrics 87
 - Percent of TV Show Viewers Who Had Eyes on Screen During Commercials in Eight Studies: 1961-2016 90
 - Average Commercial Exposure Rates by Daypart/Network Type/Program Genres 91
- III. Digital Video “Ad Exposures” 92
- IV. Other Metrics 94
- V. A Realistic Assessment on the Future of Comparable Metrics 95
 - Hypothetical Ad Message Recall for 15-Second TV Commercials by Platform 97

- CHAPTER FIVE: ADVERTISING IMPACT 99**
 - I. How Advertisers Evaluate Media 101
 - II. How Different Media Contribute to Ad Impact 103
 - Average Sales Return Per Media Dollar Spent for Packaged Goods Advertisers by Medium 109
 - III. What Can ROI Analysis Tell Us About Ad Impact? 110
 - Proportion of Impact Delivered by TV, Print & Online Media for 40 Brands by Brand Metrics 114
 - Percent Lift by Brand Metrics Among Those Exposed to the Medium 115