

TABLE OF CONTENTS

I. The State Of TV: 2018-19	1
II. Basics	7
Penetration & Access Trends	9
Growth of TV Penetration: 1950-2018.	11
Device Penetration In TV Households: 2011-18	12
Profiling Non-TV Homes	13
Profile Of TV And Non-TV Homes By Age, Household Size & Income	14
Many People Aren't Planning To Cut The Cord	15
Pay TV Subscribers Who Do Not Plan To Cancel By Age And Other Sources Of TV Content Used	16
TV Ad Revenue Trends	17
Estimated Gross TV Ad Revenues By Type Of Placement: 1950-2018	19
Trends In TV Network, Cable & Barter Syndication Ad Revenues: 1980-2018	20
Local Market TV Ad Revenues: 2004-18	21
Estimated Share Of Ad Revenues And Ad Impressions By TV Platform	22
Media Use By Time Of Day	23
Share Of Time Spent By Adults Per Day By Daypart & By Medium	24
TV's Upfront 2018-19	25
Estimated Upfront TV Primetime Sales: 1990-91 To 2018-19 Seasons	28
National Primetime TV Upfront Ad Sales: 2008-09 To 2018-19 Seasons	29
Adult Viewer CPM Trends For National TV Upfront Buys: 2008-09 To 2018-19 Seasons	30
Estimated National TV Upfront Primetime Ad Dollar Sales: 1990-91 To 2018-19 Seasons	31
Upfront CPM Comparisons By Daypart	32
2018-19 Season Upfront CPM Estimates For Broadcast, Syndication & Cable By Daypart And By Age/Sex Demos.	33
Adult Primetime Upfront CPM Trends By Age: 2008-09 To 2018-19 Seasons	34
Women Monday-Friday Daytime Upfront CPM Trends By Age: 2008-09 To 2018-19 Seasons	35
Adult Monday-Friday Early Evening Upfront CPM Trends By Age: 2008-09 To 2018-19 Seasons	36
Adult Monday-Friday Late Evening Upfront CPM Trends By Age: 2008-09 To 2018-19 Seasons	37
Less Ad Clutter Is A Good Deal For Everyone, Especially The TV Networks.	38
Advanced TV	40

Continued→

Linear TV's Incomes & Profits For 2018 45

 Incomes, Costs & Gross Profits Of Linear TV Business Segments 47

Broadcast TV's Retransmission Fees 48

 Broadcast TV Station Retransmission Incomes: 2006-18 49

How The Media Compare In Branding Vs. Non-Branding Ad Spending 50

 U.S. Ad Revenues By Medium: Total Vs. Branding Campaigns 51

How TV Builds Its Reach 52

 How Broadcast Network Primetime Shows Develop Adult Reach & Frequency 55

 How Monday-Friday Shows Develop Adult Reach & Frequency 56

 How Combinations Of TV Networks And Stations Develop All Daypart Adult Reach 57

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

 One Day To Three Months 58

 Adult 4-Week Reach Estimates For Broadcast Network Primetime Buys 61

 Adult 4-Week Reach Estimates For Six TV Dayparts 62

How Many Channels Do We Watch? 63

 Distribution Of Channels Receivable Per TV Home: Early-1950s To 2018 65

 Trends In Weekly Viewing, Channels Viewed And Time Spent Per Channel:

 Early-1950s To 2018 66

 Average Adult Exposure To TV Program Sources Over Extended Time Frames 67

Out-Of-Home Audiences 68

 Location Of Live Viewing: 1950-2018 70

 Average Telecast Adult Audience Added To Live Plus Delayed Exposure

 By OOH Viewing 71

 Demographic Profile Of The Adult Live TV Audience By Location 72

 Incremental Gains To Total Audience From Out-Of-Home Viewing

 By Generation And TV Types 73

TV's Solitary Viewers 74

 Solitary Viewing Trends For Persons Aged 2+: Early-1950s To 2018 75

 Proportion Of TV Viewers Watching By Themselves: Mid-1950s To 2018 76

Broadcast Network Primetime TV Program Production Costs 77

 Estimated Production Costs For Broadcast Network Primetime Fare: 1955-2018 79

Changing TV Commercial Lengths 80

 Trends In National Advertiser TV Use By Commercial Length: 1965-2018 81

TV Commercial Production Costs 82

 Average Production Costs For A Nationally Aired :30 TV Commercial: 1965-2018 83

III. Emerging Alternatives To Linear TV 85

 New Ways To Watch TV 87

 Trends In Average Adult Daily Use Of Viewing Options: 2012-18 89

 Weekly Reach Of Various TV/Video Platforms For Adults By Age 90

Continued→

Average Weekly Time Spent With TV/Video For Adults By Age 91

Growth Of SVOD/OTT Penetration And Usage For The Adult TV Population: 2010-18 . . . 92

OTT Streaming Usage Data From comScore 93

Profile Of Wi-Fi Streaming Homes By TV Reception Status And Age Of Household Head. . 94

TV Usage By Program Sources 95

Erosion Of ABC/CBS/NBC Ratings: 1970-2018 96

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

 Fall 1950-2018 97

Share Of Weekly TV/Streaming Video Usage By Program Source: Early-1950s To 2018 . . 98

IV. TV's Audience & Program Genre Profiles 99

 How TV/Video Consumption Changed Between 1998 And 2018 101

 Average Hours Spent Per Week With TV/Video Content For Adults By Age:

 1998 And 2018 103

 Average Hours Spent Per Week With TV/Video Content For Adults

 By Program Source: 2018 And 1998 104

 Heavy Viewers Then And Now. 106

 Age/Education Profile Of Adult Heavy And Light TV Viewers: 1968-2018. 107

 America's Changing Tastes In Primetime Hit Show Fare 108

 Average Minute TV Home Rating Of Top 10 Primetime TV Shows:

 1950-51 To 2017-18 Seasons 110

 Composition Of Primetime Top 10 Rating Hits By Program Genre:

 1950-51 To 2017-18 Seasons 114

 What Kinds Of Programs Do We Watch? 115

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

 Early-1950s To 2018 117

 Hours Spent Weekly Viewing Linear TV By Program Genre For Select Demos 118

 Profiling The Audiences Of TV's Major Program Types 119

 Relative Indices Of Adult Viewing Of Primetime Broadcast Network Program

 Genres By Sex, Age & Household Income 121

 Relative Indices Of Adult Viewing Of Monday-Friday TV Program Genres By Sex,

 Age & Household Income 122

 Relative Indices Of Adult Viewing Of Monday-Friday Fringe Evening TV Program

 Genres By Sex, Age & Household Income 123

 Relative Indices Of Adult Viewing Of Cable TV Program Genres By Sex, Age

 & Household Income 124

 Demographic Profile Of Average Telecast Adult TV Sports Viewers 125

 Median Age Analysis Of TV Program Genre Viewers 126

 Median Age Of Average Primetime ABC/CBS/NBC Telecast Viewers: 1960-2018 128

 Median Age Of Average Telecast Primetime Viewers By Program Source And Genre. . . . 129

Continued →

Median Age Of Average Telecast Viewers Of Daytime And Fringe Evening TV
 By Program Source And Genre 130
 Median Age Of Average Telecast TV Sports Viewers 131
 Median Age Of Televised Sports Audiences: 1995-2018 132
 How Much Of TV's Content Do We Watch? 133
 Average TV Home Resident's Daily TV Viewing Relative To TV Viewing Options:
 Early-1950s-2018 134

V. Viewer Engagement & Ad Impact 135

Defining TV Viewer Engagement 137
 Findings Of 30 Primetime Viewer Attentiveness Studies: 1955-2016 142
 Fully Attentive Adult Viewer Ratios For Selected TV Program Genres 143
 How TV Branding Campaigns Are Developed 144
 Does Anyone Watch TV Commercials? 151
 Summary Of Seven Observational Studies Of TV Commercial Exposure: 1961-2016 155
 Estimated Average Commercial Exposure Factors By Daypart/
 Network Type/Program Genres 156
 Relative Indices Of Commercial Exposure By Position In Pod & Extent Of Clutter 157
 Heavy Vs. Light Viewer Attentiveness To Program And Commercial Content 158
 Visual Attentiveness Indices By TV Viewing Quintiles 159
 Indices Of Eyes-On-Screen During Commercials By Age & TV Viewing Quintiles 160
 How TV Ad Campaigns Work Over Time 161
 How The Impact Of TV Branding Campaigns Is Measured 164
 How Long Does The Impact Of A Single Commercial Exposure Last? 169
 How Unaided Last Brand Recall Declined By Length Of Time After Exposure
 In Five Studies 170
 Increase In Share Of Sales For 19 Brands By Number Of Days Since First TV Exposure 171
 TV Ad Campaign Wearout 172
 Major Packaged Goods Brands Index Of Purchase Response By Frequency
 Of TV Ad Exposure In Week Prior To Buying Decision 175
 Relative Recall Values Of TV Commercials By Length From The 1960s To Now 176
 Relative Indices Of Verified Ad Message Recall For TV Commercial
 Lengths: 1960s-2018 177
 TV Ad Campaign Awareness: How Many GRPs Does It Take? 178
 Actual Commercial Exposure Reach And Frequency Distribution Pattern
 For A 1000-GRP Schedule 183
 Estimated TV Ad Campaign Ad Awareness Levels At 100 And 1000 GRPs 184
 How 23 Brand Commercials Built Awareness By GRP Levels 185
 How Brand Ad Awareness Builds By Adjusted GRP Levels 186

VI. Media Planning Implications: Applying Ad Metrics To TV Planning & Buying 187

