

## INTRODUCTION

### UPDATED TV REACH TABLES

Media planners have traditionally relied on standard TV reach tables when devising recommendations to present to their clients. These project expected four-week reach levels that may be attained for various amounts of gross rating points (GRPs) in various dayparts. Distinctions are usually drawn between various types of networks (broadcast vs. cable), age/sex demos, or a mix of network types by daypart.

Unfortunately, the generalized sample schedule tabulations that are the basis of most TV reach tables are not updated as often as they should be and in the current media environment, this is a huge problem as the reach capabilities of “linear TV” have been profoundly altered in recent years by cord-cutting and competition from SOV/OTT services. Indeed, where basic cable once covered almost 90% of US TV homes via cable systems, satellite or telco distributions, that has declined to 72-74% currently, with the prospects of still more defections to come. Even broadcast TV, which maintains a high penetration due to the growth of over-the-air reception (about 14% of all TV homes in 2019), has lost some of its reach due to some homes switching to broadband-only reception.

Because of the increasing rating fragmentation affecting all sectors of linear TV, plus the impact of cord cutting (a more recent phenomenon), MDI has revisited its **TV Reach Finder** report and fully updated its tables to reflect the current 2019-2020 situation. The contrast between old TV reach tables and our latest findings are demonstrated by the following table. In the late-1970s, a media planner who bought 500 broadcast TV network adult GRPs in primetime for a client could expect to reach 94% of all adults monthly. Twenty years later, the reach of such a buy had declined to 81%, and our latest projections for 2019-20 indicate a 4-week reach of only 65%.

<b>ADULT 18+ 4-WEEK REACH ESTIMATES FOR BROADCAST NETWORK PRIMETIME BUYS</b>				
<b>GRPs</b>	<b>4-Wk. Reach</b>			
	<b>1975-80</b>	<b>1995-2000</b>	<b>2015-16</b>	<b>2019-20</b>
20	18	16	13	12
40	36	31	20	19
60	44	40	26	25
80	52	46	32	31
100	60	52	38	36
120	65	55	42	39
140	70	58	46	43
160	74	61	50	47
180	78	64	52	49
200	80	67	54	51
300	88	76	62	58
400	92	79	66	62
500	94	81	69	65

*Source: Media Dynamics, Inc.*

We have drawn upon our decades of experience in the media audience business and conducted a review of recent data to create reach tables that accurately represent the five major TV dayparts: early AM (M-F 6-9am), daytime (M-F 9am-5pm), early fringe (M-F 5-8pm), primetime (Mon.-Sun. 8-1pm) and late fringe (M-F 11pm-2am), plus an early and late fringe combination.

We have examined ad schedules to get a better idea of how brands actually disperse their TV buys. This is important because media planners often assume a wide dispersal—many programs, many channels—when using reach tables; however, in actual practice this is not the case when corporate upfront buys are actually allocated to the brands. This is especially noticeable in cable daytime or fringe evening shows when the same brand’s commercials frequently appear in every episode one day after another, without regard for the consequences of overexposure and loss of reach. Taking this into account, our tables use somewhat lower reach levels to reflect the fact that “dispersed” TV ad scheduling as it is currently executed may not be as diverse as is assumed.

Using a variety of sources, including our own estimates, the bulk of this report presents 4-week adult reach tables by GRP level, starting with 1 GRP and rising one point at a time to 500 GRPs, after which we extend the tables to 1000 GRPs in 100 GRP intervals. Tables are provided covering early AM, daytime, early fringe, primetime and late evening, for 18 basic demos (adults/men/women aged 18+, 18-34, 18-49, 25-54, 55+ and H.H. income \$150,000+).

## **DAYPART COMBINATIONS**

Why do we combine dayparts? In the absence of tables that provide reach attainment estimates across dayparts (there are too many possible combinations to make such tables practical), media planners often resort to the random duplication principle to come up with a figure. For example, if a planner is contemplating a plan that generates a 50% reach in primetime and a 30% reach in daytime, it is important to show the client what the total 4-week reach of the proposed TV schedule would be. Clearly, it can’t be lower than 50%, since this is what primetime alone delivers; nor can it be greater than the sum of the two reach figures (80%), as this would indicate no duplication between the two audiences. The answer lies somewhere between 50% and 80%.

The random duplication concept assumes that 50% of the daytime audience is also reached in primetime or, conversely, that 30% of the primetime reach is also exposed to the ads in the daytime. The result in either case is the same, creating a duplicated reach estimate of 15% (.50% x 30%). Given that assumption, one merely calculates the gross possible reach (50% + 30% = 80%) and subtracts the duplicated portion (15%), resulting in a combined prime plus day reach of 65%.

Presenting this as a formula, we take the sum of the two reaches (a + b) minus their product (a x b) to calculate the net reach:  $(a + b) - (a \times b) = \text{reach}$ .

In the event that a third daypart is used, say late fringe with a 20% reach, the process is the same, only this time we start with the calculated reach of the first pair (65%) and add to it the third component to obtain our gross reach (65% + 20% = 85%). Again, the duplication is calculated by multiplication (65% x 20% = 13%) and this is subtracted from the gross (85% – 13% = 72%) to get

the reach for all three dayparts. If a fourth daypart is added, once again the process repeats, with the three-daypart reach (72%) being combined with that of the fourth.

But audience duplication is not totally random, so clearly some sort of downward adjustment is indicated. We have developed what we believe to be realistic downward adjustment factors for pairs, trios, quartets and quintets of TV dayparts. These are summarized in the following table. For example, if one is combining daytime and early fringe and the calculated reach is 18.1%, the adjustment factor as shown in the table for reach levels ranging from 10-19 is 3%. Applying this factor, our reach would decline to 17.6%. In like manner, if we had a combined four-daypart reach calculation yielding 97.8%, the reduction factor is -1.1%, which reduces the estimate to 96.7%.

#### FOUR-WEEK TV REACH ADJUSTMENT FACTORS

	Reduction Factors By Calculated Reach Level									
	< 10	10-19	20-29	30-39	40-49	50-59	60-69	70-79	80-89	90 +
<b>TV Daypart Pairs</b>										
EAM + Day	3.5	3.3	3.0	2.6	2.5	2.4	2.3	2.2	2.0	1.9
EAM + EF	2.6	2.5	2.5	2.4	2.3	2.2	2.1	2.0	1.9	1.8
EAM + P	1.9	1.8	1.8	1.7	1.7	1.6	1.5	1.4	1.4	1.3
EAM + LF	2.1	2.0	2.0	1.9	1.8	1.7	1.7	1.7	1.6	1.6
Day + EF	3.4	3.0	2.7	2.3	2.0	1.8	1.6	1.5	1.4	1.3
Day + P	1.8	1.6	1.4	1.2	1.2	1.2	1.2	1.2	1.2	1.2
Day + LF	2.5	2.2	1.9	1.7	1.5	1.5	1.5	1.5	1.5	1.5
EF + P	1.6	1.4	1.2	1.2	1.2	1.2	1.1	1.1	1.1	1.1
EF + LF	1.9	1.7	1.5	1.4	1.4	1.4	1.4	1.4	1.4	1.3
LF + P	2.8	2.5	2.2	1.9	1.9	1.9	1.9	1.8	1.8	1.8
<b>TV Daypart Combos</b>										
All Trios	1.4	1.4	1.4	1.3	1.3	1.3	1.3	1.3	1.3	1.3
All Quartets	1.2	1.2	1.2	1.2	1.2	1.1	1.1	1.1	1.1	1.1
All Quintets	1.0	0.9	0.8	0.8	0.7	0.7	0.6	0.6	0.5	0.5

Note: EAM—early AM, EF—early fringe; P—primetime; LF—late fringe.

Source: Media Dynamics, Inc.

## REACH TABLES INCLUDED IN THIS REPORT

*Demographic Breaks For Each Table: 18+, 18-34, 18-49, 25-54, 55+ and Household Income \$150K+*

1.	Primetime Broadcast: Adults .....	1
2.	Primetime Broadcast: Men .....	11
3.	Primetime Broadcast: Women.....	21
4.	Primetime Cable: Adults .....	31
5.	Primetime Cable: Men .....	41
6.	Primetime Cable: Women .....	51
7.	Primetime Broadcast + Cable: Adults .....	61
8.	Primetime Broadcast + Cable: Men .....	71
9.	Primetime Broadcast + Cable: Women .....	81
10.	Early AM Broadcast/Cable: Adults .....	91
11.	Early AM Broadcast/Cable: Men.....	101
12.	Early AM Broadcast/Cable: Women .....	111
13.	Daytime Broadcast/Cable/Syndication: Adults .....	121
14.	Daytime Broadcast/Cable/Syndication: Men .....	131
15.	Daytime Broadcast/Cable/Syndication: Women .....	141
16.	Early Fringe Cable/Syndication: Adults.....	151
17.	Early Fringe Cable/Syndication: Men.....	161
18.	Early Fringe Cable/Syndication: Women .....	171
19.	Late Fringe Broadcast/Cable/Syndication: Adults .....	181
20.	Late Fringe Broadcast/Cable/Syndication: Men .....	191
21.	Late Fringe Broadcast/Cable/Syndication: Women.....	201
22.	Early + Late Fringe Broadcast/Cable/Syndication: Adults .....	211
23.	Early + Late Fringe Broadcast/Cable/Syndication: Men .....	221
24.	Early + Late Fringe Broadcast/Cable/Syndication: Women.....	231