

MDI ALERT

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HOW MASSIVE IS LINEAR TV'S REACH?

“Linear TV has the advantage of offering massive reach; streaming is a more selective platform.” Does this sound familiar? We hear this all the time as push back against the pro-streaming folks.

In a way, it’s a fair point. Although linear TV now accounts for only 45% of all "TV" viewing, it provides about 75% of the ad impressions (GRPs) available to TV advertisers. And according to various studies, as much as 75-80% of all adults claim to have watched one or more shows on broadcast TV or cable over a fairly short span of time. However, there are questions about respondents’ ability to accurately recall how they gained access to said content. Adding to the confusion, about half of the population is exposed to TV content to some degree away from their home (at someone else's home, at a bar, in a cab, at an airport, etc.).

We took a look at various data and made some estimates of the reach capabilities of linear TV and streaming among all adults as well as the 18-34 and the 55+ age groups. To make the comparisons more interesting, we estimated the average minute, day, week and month reach of each platform.

TV PLATFORM REACH LEVELS BY ADULT AGE GROUPS 2026				
	Avg. Minute	Avg. Day	Avg. Week	Avg. Month
Adults 18+				
Linear TV	9%	58%	67%	76%
Streaming	10	55	69	75
<i>Total</i>	<i>19</i>	<i>79</i>	<i>90</i>	<i>96</i>
Adults 18-34				
Linear TV	3	28	44	55
Streaming	8	53	70	78
<i>Total</i>	<i>11</i>	<i>69</i>	<i>82</i>	<i>93</i>
Adults 55+				
Linear TV	17	79	87	95
Streaming	10	54	67	72
<i>Total</i>	<i>27</i>	<i>88</i>	<i>95</i>	<i>99</i>
<i>Source: Media Dynamics, Inc.</i>				

As shown, if an average adult resident of a TV home devotes about 2.2 hours per day to linear TV, it's a simple matter to calculate linear TV's average minute reach for all such adults by dividing the 2.2 viewing hours by the number of hours in a day. The answer—9%—is the average minute

reach of linear TV among all adults. This figure drops to a mere 3% for adults aged 18-34 and rises to 17% for those aged 55+. That's quite a difference.

But what about longer time spans? Here we see that even though linear TV's average minute reach among 18-34-year-olds is only 3%, over a 24-hour interval it rises to 28% and still more viewers are added to the group's reach tally over the course of a week or a month. Indeed, more than half of 18-34s will watch one or more linear TV shows over a 30-day period. However, if the same comparison is made for the 55+ age group, we see that linear TV is very sharply oriented towards older viewers. Therefore, if an advertiser really needs some sort of balance in its reach across various age groups or wants to place more media "weight" on the younger end, a mix of linear TV and streaming is what's needed. Neither platform can do the whole job exclusively.

This last point is crucial when we examine how streaming adds reach to linear TV by age group. Taking an average week for adults aged 18-34, linear TV maxes out at a 44% reach while 70% are reached by streaming. Together, the two platforms attain an 82% reach.

This ad-free content introduces another variable that media planners need to consider, probably by obtaining special tabs from Nielsen for sample ad schedules to determine how much reach one platform can add to the other. In addition, a significant percentage of streaming's reach (about 25%) is exclusive to that platform while roughly 10% of linear TV's reach is also exclusive. But the question is, how much of this exclusive viewership is to ad-free-only content?

We expect that answers to questions such as these will be forthcoming as Nielsen's new big data plus people meter national TV rating system gets wider usage. Meanwhile, media planners need to be careful not to overestimate their likely reach attainment using either platform exclusively or in combination. In our view, using both platforms is usually the best bet. One thing is clear, however; while linear TV once attained weekly reach levels of 90% + among all sectors of the TV home population, from children and teens up to oldsters, that is no longer the case.