

Every industry needs a measure of the size of its marketplace, and the radio and television industries are no exceptions.

A major source of such media market data in the United States is Nielsen Media Research (NMR), and one of the measurements it takes annually is TV Households (TV HH).

A home with one operable TV or monitor is Nielsen's definition of a TV HH, and television's market penetration is expressed by the national total. By combining that total with population data provided by the Census Bureau and state governments, Nielsen is able to extrapolate its "Universe Estimates," the national potential audience for any program.

### **With Us from Day One**

The advent of broadcast advertising, in July 1941, was coincidental with the dawn of commercial television, and within ten years market research in the new medium was in full swing.

Since the Federal Communications Commission (FCC) allowed those first TV ads—for Sun Oil, Lever Bros., Procter & Gamble and the Bulova Watch Company—reliable audience measurement has been necessary for marketers to target their campaigns. The proliferation of devices for viewing TV content and the continual evolution of consumer behavior have made the task more important—and more challenging—than ever.

Nevertheless, while the reality of "TV Everywhere" has undeniably complicated the work of audience measurement, the use of one rudimentary gauge persists—the number of households with a set, TV HH.

### **Nielsen Media Research**

In the United States, Nielsen Media Research (NMR) is the authoritative source for television audience measurement (TAM). Best-known for its ratings system, which has determined the fates of many television programs, NMR also tracks the number of households in a Designated Market Area (DMA) that owns a TV.

Published annually before the start of the new TV season in September, these Universe Estimates, representing potential regional audiences, are used by advertisers to plan effective campaigns.

### **TV Ownership...**

For more than 40 years, almost all households in the United States have owned at least one television. Nielsen estimates that number to be 118.4 million for the 2016-17 season<sup>1</sup>, marking an increase since last year's estimates, and attributed to the increase in population as well as increased penetration levels for TV.<sup>2</sup>

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<sup>1</sup> "Nielsen Estimates 118.4 Million TV Homes in the U.S. for the 2016-17 TV Season." August 26<sup>th</sup>, 2016. *Nielsen*. Retrieved November 9<sup>th</sup>, 2016, from <http://www.nielsen.com/us/en/insights/news/2016/nielsen-estimates-118-4-million-tv-homes-in-the-us-for-the-2016-17-season.html>

<sup>2</sup> *Ibid.*

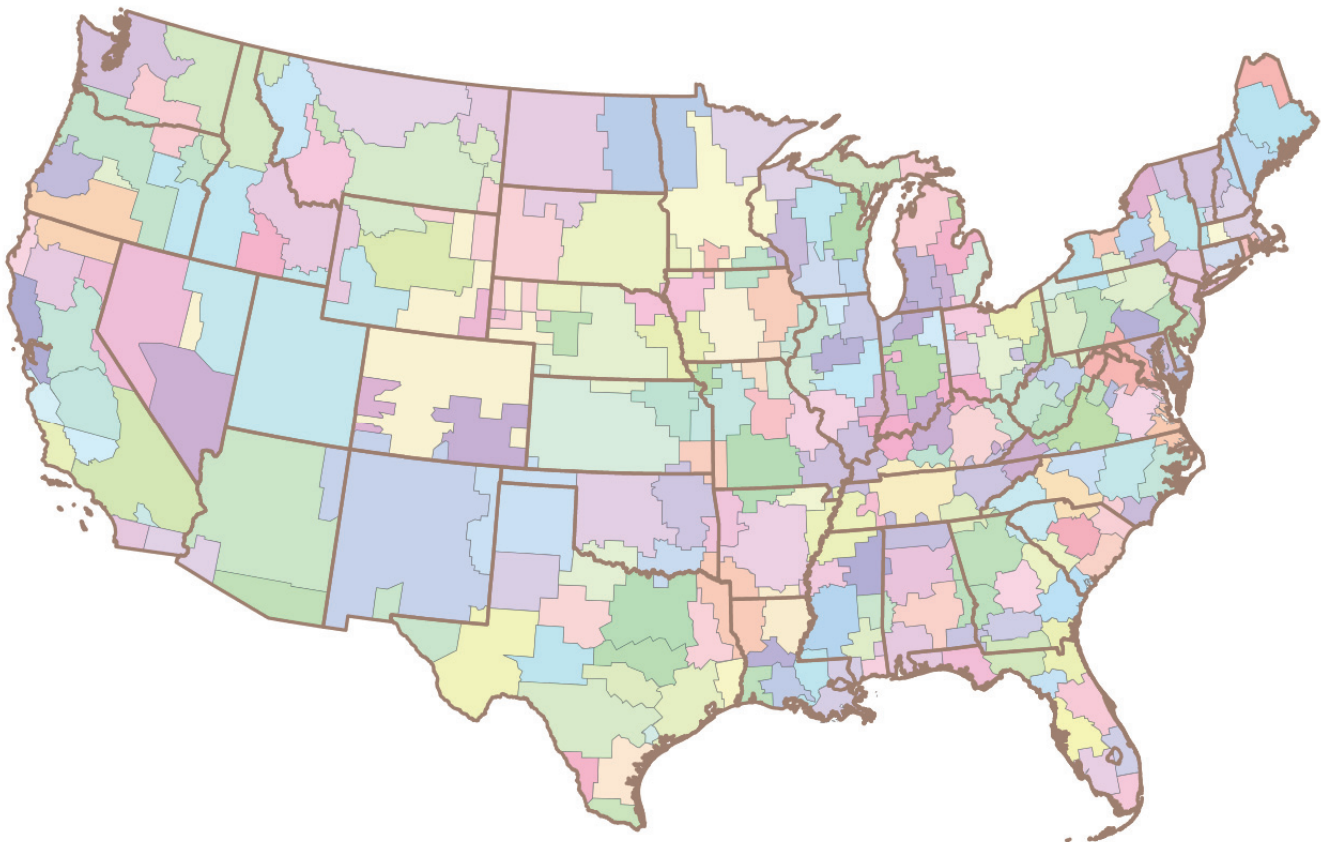
### ...Is Where One Would Expect

Nielsen Media Research divides the United States into 210 Designated Market Areas (DMAs; see Figure 1). Each market area consists of a number of counties served by the same television and radio stations. Not surprisingly, the largest DMAs are the most heavily populated metropolitan areas in the country.

They are named for the largest city (e.g., New York) or cities (e.g., San Francisco-Oakland-San Jose) in the region, and there is sometimes service overlap with nearby markets.

There is little fluctuation in the rankings from year to year, especially in the top ten. However, most notable among the changes for the 2016-17 rankings is a reshuffling in positions 8-10, with Houston moving up two spots to take 8<sup>th</sup> place, and Boston moving down one spot to 9<sup>th</sup>. Atlanta rounds off the list in 10<sup>th</sup> place.

Figure 1. Designated Market Areas



Source "Designated Market Areas, 2013" by 7.11brown licensed under CC BY-SA 3.0

### Regional Top Fives<sup>3</sup>

The top 5 market areas in the Northeast (as defined by the Census Bureau) are New York (1), Philadelphia (4), Boston (9), Pittsburgh (23) and Hartford & New Haven (30), representing 12.9 per cent of the population of the United States.

In the South, the largest DMAs are Dallas-Ft. Worth (5), Washington, DC (7), Houston (8) Atlanta (10), and Tampa-St. Petersburg (11), representing a further 10.4per cent of the total population.

Chicago (3) leads the Midwest, followed by Detroit (13), Minneapolis-St. Paul (15), Cleveland-Akron (19) and St. Louis (21), totaling to 8.5 per cent of the total population.

In the West, the second largest city in the country, Los Angeles, is, naturally, the number 2 DMA. The other four in the region are San Francisco-Oakland-San Jose (6), Phoenix (12), Seattle-Tacoma (14) and Denver (17), representing 13.0 per cent of the total population.

### Device Ownership

As observed in recent years, trends in device ownership reveal an increase in smartphones, in addition to television sets and laptops.

Nielsen's "Total Audience Report" from Q2 2016 observes that the number of DVD and Blu-Ray Players in households has dropped incrementally since 2015, with video game consoles following a similar pattern. VCRs are out of the running altogether as digital devices rise, a point demonstrated by the increases seen in digital devices such as Smart TV, HD TV, SVOD, and tablets.

Regardless of technological innovation, Nielsen's companion "Comparable Metrics Report" from Q2 2016 confirms that television continues to be the primary device for viewing media content, though smartphones and many other digital devices are quickly gaining ground.<sup>4</sup>

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<sup>3</sup> "Local Television Market Universe Estimates." *Nielsen*. Retrieved November 9<sup>th</sup>, 2016 from <https://www.rtdna.org/uploads/files/2016-2017-nielsen-local-dma-ranks.pdf>. PDF.

<sup>4</sup> "The Nielsen Comparable Metrics Report – Q2 2016." *Nielsen*. <http://www.nielsen.com/us/en/insights/reports/2016/the-comparable-metrics-report-q2-2016.html>. PDF.

## 55 Years of Station Transactions

YEAR	RADIO ONLY*	GROUPS*	TV ONLY	TOTAL
1954	\$10,224,047 (187)	\$26,213,323 (18)	\$23,906,760 (27)	\$60,344,130
1955	27,333,104 (242)	22,351,602 (11)	23,394,660 (29)	\$73,079,366
1956	32,563,378 (316)	65,212,055 (24)	17,830,395 (21)	\$115,605,828
1957	48,207,470 (357)	47,490,884 (28)	28,489,206 (38)	\$124,187,560
1958	49,868,123 (407)	60,872,618 (17)	16,796,285 (23)	\$127,537,026
1959	65,544,653 (436)	42,724,727 (15)	15,227,201 (21)	\$123,496,581
1960	51,763,285 (345)	24,648,400 (10)	22,930,225 (21)	\$99,341,910
1961	55,532,516 (282)	42,103,708 (13)	31,167,943 (24)	\$128,804,167
1962	59,912,520 (306)	18,822,745 (8)	23,007,638 (16)	\$101,742,903
1963	43,457,584 (305)	25,045,726 (3)	36,799,768 (16)	\$105,303,078
1964	52,296,480 (430)	67,185,762 (20)	86,274,494 (36)	\$205,756,736
1965	55,933,300 (389)	49,756,993 (15)	29,433,473 (32)	\$135,123,766
1966	76,633,762 (367)	28,510,500 (11)	30,574,054 (31)	\$135,718,316
1967	59,670,053 (316)	32,086,297 (9)	80,316,223 (30)	\$172,072,573
1968	71,310,709 (316)	47,556,634 (9)	33,588,069 (20)	\$152,455,412
1969	108,866,538 (343)	35,037,000 (5)	87,794,032 (32)	\$231,697,570
1970	86,292,899 (268)	1,038,465 (3)	87,454,078 (19)	\$174,785,442
1971	125,501,514 (270)	750,000 (2)	267,296,410 (27)	\$393,547,924
1972	114,424,673 (239)	0 (0)	156,905,864 (37)	\$271,330,537
1973	160,933,557 (352)	2,812,444 (4)	66,635,144 (25)	\$230,381,145
1974	168,998,012 (369)	19,800,000 (5)	118,983,462 (24)	\$307,781,474
1975	131,065,860 (363)	0 (0)	128,420,101 (22)	\$259,485,961
1976	180,663,820 (413)	1,800,000 (3)	108,459,657 (32)	\$290,923,477
1977	161,236,169 (344)	0 (0)	128,635,435 (25)	\$289,871,604
1978	331,557,239 (586)	30,450,000 (5)	289,721,159 (51)	\$651,728,398
1979	335,597,000 (546)	463,500,000 (52)	317,581,000 (47)	\$1,116,678,000
1980	339,634,000 (424)	27,000,000 (3)	534,150,000 (35)	\$900,784,000
1981	447,838,060 (625)	78,400,000 (6)	227,950,000 (24)	\$754,188,060
1982	470,722,833 (597)	0 (0)	527,675,411 (30)	\$998,398,244
1983	621,077,876 (669)	332,000,000 (10)	1,902,701,830 (61)	\$2,855,779,706
1984	977,024,266 (782)	234,500,000 (2)	1,252,023,787 (82)	\$2,463,548,053
1985	1,414,816,073 (1,558)	962,450,000 (218)	3,290,995,000 (99)	\$5,668,261,073
1986	1,490,131,426 (959)	1,993,021,955 (192)	2,709,516,490 (128)	\$6,192,669,871
1987	1,236,355,748 (775)	4,610,965,000 (132)	1,661,832,724 (59)	\$7,509,153,472
1988	1,841,630,156 (845)	1,326,250,000 (106)	1,779,958,042 (70)	\$4,947,838,198
1989	1,148,524,765 (663)	533,599,078 (40)	1,541,055,033 (84)	\$3,223,178,876
1990	868,636,700 (1,045)	411,037,150 (60)	696,952,350 (75)	\$1,976,626,200
1991	534,694,500 (793)	206,995,500 (61)	273,365,000 (38)	\$1,015,055,000
1992	603,192,980 (667)	318,176,050 (24)	124,004,000 (41)	\$1,045,373,030
1993	815,450,000 (633)	756,722,000 (NA)	1,728,711,000 (101)	\$3,300,883,000
1994	970,400,000 (494)	1,800,000,000 (154)	2,200,000,000 (89)	\$4,970,400,000
1995	792,440,000 (524)	2,790,000,000 (213)	4,740,000,000 (112)	\$8,322,440,000
1996	2,840,820,000 (671)	12,034,000,000 (345)	10,488,000,000 (99)	\$25,362,820,000
1997	2,461,570,000 (630)	14,580,000,000 (329)	6,400,000,000 (108)	\$23,441,570,000
1998	1,596,210,000 (589)	14,080,000,000 (271)	7,120,000,000 (90)	\$22,796,210,000
1999	1,718,000,000 (382)	26,880,000,000 (196)	4,720,000,000 (86)	\$33,318,000,000
2000**	24,900,000,000 (1,794)	0 (0)	8,800,000,000 (154)	\$33,700,000,000
2001**	3,800,000,000 (1,000)	0 (0)	4,900,000,000 (108)	\$8,700,000,000
2002**	5,594,141,000 (836)	0 (0)	2,529,039,000 (249)	\$8,123,180,000
2003**	2,400,000,000 (950)	0 (0)	520,000,000 (97)	\$2,920,000,000
2004**	1,897,422,000 (901)	0 (0)	871,923,000 (66)	\$2,769,345,000
2005**	2,791,531,000 (895)	0 (0)	2,842,439,000 (86)	\$5,633,970,000
2006**	22,871,247,000 (2101)	0 (0)	18,127,686,000 (180)	\$40,998,933,000
2007**	1,488,628,000 (1,187)	0 (0)	4,616,018,000 (295)	\$6,104,646,000
2008**	642,344,000 (749)	0 (0)	745,511,000 (48)	\$1,387,855,000
2009**	345,487,000 (638)	0 (0)	713,490,000 (80)	\$1,058,977,000
2010**	339,317,000 (816)	0 (0)	199,288,000 (60)	\$538,605,000
2011**	4,275,300,000 (1,067)	0 (0)	1,098,971,000 (49)	\$5,374,271,000
2012**	1,082,137 (898)	0 (0)	1,891,012 (95)	\$2,973,149
2013**	1,040,135 (887)	0 (0)	8,823,042 (290)	\$9,863,177
2014**	944,895 (924)	0 (0)	4,615,443 (168)	\$5,560,338
2015**	712,000 (785)	0 (0)	669,950 (86)	\$1,381,950
2016 YTD**	446,232 (475)	0 (0)	5,271,500 (97)	\$5,737,732
<b>TOTAL</b>	<b>\$97,204,200,047</b>	<b>\$85,110,886,616</b>	<b>\$102,162,149,350</b>	<b>\$284,477,256,013</b>

Note: Dollar volume figures represent total considerations reported for all transactions with exception of minority interest transfers in which control of stations did not change hands and stations sold as part of larger company transactions. Although all states have been approved by the FCC, they may not necessarily have reached final closing. Prior to 1978, combined AM-FM facilities were counted as one station in computing total number of stations traded. Now AM-FM combinations are counted as two stations.

\*Starting in 1993, the Radio only column includes only stand alone AM and FM deals and the Groups column contains AM-FM combos and all other multiple station deals. In previous years the AM-FM combos were included under Radio only.

\*\*Figures for 2000 to 2016 courtesy of BIA/Kelsey (broadcast.biakelsey.com).

## Top 50 Shows, Total Viewers

Rank	Series Title	Network	Viewers (in Millions)
1	NFL Sunday Night Football	NBC	22
2	The Big Bang Theory	CBS	20.6
3	NCIS	CBS	20.5
4	The Walking Dead	AMC	18.9
5	NFL Thursday Night Football	CBS/NFL	17.7
6	Empire	Fox	16.2
7	NCIS: New Orleans	CBS	16.1
8	Blue Bloods	CBS	14.6
9	Dancing With the Stars	ABC	13.7
10	The X-Files	Fox	13.6
11	The Voice (Monday)	NBC	13.5
12	Scorpion	CBS	13.3
13	The Voice (Tuesday)	NBC	13.2
14	Little Big Shots	NBC	13
15	NFL Monday Night Football	ESPN	12.9
16	Criminal Minds	CBS	12.8
17	Madam Secretary	CBS	12.4
18	60 Minutes	CBS	12.3
19	Modern Family	ABC	12.1
20	NCIS: Los Angeles	CBS	12.1
21	Hawaii Five-O	CBS	11.7
22	Blindspot	NBC	11.6
23	Chicago Fire	NBC	11.6
24	The Blacklist	NBC	11.5
25	American Idol (Wednesday)	Fox	11.5
26	Downtown Abbey (Masterpiece)	PBS	11.5
27	Grey's Anatomy	ABC	11.5
28	Survivor	CBS	11.2
29	American Idol (Thursday)	Fox	11.1
30	Scandal	CBS	10.8
31	The Good Wife	CBS	10.8
32	Chicago Med	NBC	10.7
33	Life in Pieces	CBS	10.5
34	Chicago P.D.	NBC	10.4
35	Limitless	CBS	10.3
36	How to Get Away with Murder	ABC	10.3
37	Code Black	CBS	10.2
38	Game of Thrones	HBO	10.1
39	Supergirl	CBS	10
40	Castle	ABC	9.9
41	Shades of Blue	NBC	9.9
42	Law & Order: SVU	NBC	9.8
43	Mom	CBS	9.8
44	The Bachelor	ABC	9.5
45	Criminal Minds: Beyond Borders	CBS	9.4
46	The Middle	ABC	9.2
47	Elementary	CBS	9.1
48	Angel from Hell	CBS	9
49	The Odd Couple	CBS	8.7
50	Mike & Molly	CBS	8.8

Source: IndieWire. "Top 50 Shows, Total Viewers." *These Are the 100 Most-Watched TV Shows of the 2015-16 Season: Winners and Losers*. Written by Michael Schneider.

Data supplied courtesy of IndieWire and Michael Schneider, based on analysis of Nielsen data  
Updated 11/14/2016. Used with permission.

## Sales of Television Receivers

Year	Product Category	Units (Thousands)	Dollars (Million)	Average Price
1954	Analog Color TV	5	\$2	\$400.00
1955	Analog Color TV	20	\$10	\$500.00
1956	Analog Color TV	100	\$46	\$460.00
1957	Analog Color TV	85	\$37	\$435.00
1958	Analog Color TV	80	\$34	\$425.00
1959	Analog Color TV	90	\$37	\$411.00
1960	Analog Color TV	120	\$47	\$392.00
1961	Analog Color TV	147	\$56	\$381.00
1962	Analog Color TV	438	\$154	\$352.00
1963	Analog Color TV	747	\$258	\$345.00
1964	Analog Color TV	1,404	\$488	\$348.00
1965	Analog Color TV	2,694	\$959	\$356.00
1966	Analog Color TV	5,012	\$1,861	\$371.00
1967	Analog Color TV	5,563	\$2,015	\$362.00
1968	Analog Color TV	6,215	\$2,086	\$336.00
1969	Analog Color TV	6,191	\$2,031	\$328.00
1970	Analog Color TV	4,821	\$1,684	\$349.00
1971	Analog Color TV	6,180	\$2,355	\$381.00
1972	Analog Color TV	7,555	\$2,825	\$374.00
1973	Analog Color TV	9,264	\$3,097	\$334.00
1974	Analog Color TV	7,830	\$2,658	\$339.00
1975	Analog Color TV	6,485	\$2,212	\$341.00
1976	Analog Color TV	7,700	\$2,688	\$349.00
1977	Analog Color TV	9,107	\$3,187	\$350.00
1978	Analog Color TV	10,236	\$3,583	\$350.00
1979	Analog Color TV	9,846	\$3,545	\$360.00
1980	Analog Color TV	10,897	\$4,004	\$367.00
1981	Analog Color TV	11,157	\$4,123	\$370.00
1982	Analog Color TV	11,366	\$4,141	\$364.00
1983	Analog Color TV	13,986	\$4,728	\$338.00
1984	Analog Color TV	16,083	\$5,359	\$333.00
1985	Analog Color TV	16,829	\$5,522	\$328.00
1986	Analog Color TV	18,204	\$5,836	\$321.00
1987	Analog Color TV	19,330	\$6,148	\$318.00
1988	Analog Color TV	20,216	\$5,907	\$292.00
1989	Analog Color TV	21,706	\$6,490	\$299.00
1990	Analog Color TV	20,384	\$6,197	\$304.00
1991	Analog Color TV	19,474	\$5,979	\$307.00
1992	Analog Color TV	21,056	\$6,591	\$313.00
1993	Analog Color TV	23,005	\$7,316	\$318.00
1994	Analog Color TV	24,715	\$7,225	\$292.00
1995	Analog Color TV	23,231	\$6,798	\$293.00
1996	Analog Color TV	22,384	\$6,492	\$290.00
1997	Analog Color TV	21,293	\$6,036	\$283.00
1998	Analog Color TV	22,204	\$6,122	\$276.00
1999	Analog Color TV	23,218	\$6,199	\$267.00
2000	Analog Color TV	24,175	\$6,140	\$254.00
2001	Analog Color TV	21,167	\$5,130	\$242.00
2002	Analog Color TV	22,469	\$5,782	\$257.00
2003	Analog Color TV	20,791	\$4,756	\$229.00
2004	Analog Color TV	19,934	\$3,526	\$177.00
2005	Analog Color TV	16,934	\$2,790	\$165.00

2006	Analog Color TV	8,761	\$1,000	\$114.00
2007	Analog Color TV	1,166	\$115	\$99.00
1998	Digital TV Sets and Displays	14	\$43	\$3,147.00
1999	Digital TV Sets and Displays	121	\$295	\$2,433.00
2000	Digital TV Sets and Displays	625	\$1,422	\$2,275.00
2001	Digital TV Sets and Displays	1,460	\$2,648	\$1,812.00
2002	Digital TV Sets and Displays	2,535	\$4,280	\$1,688.00
2003	Digital TV Sets and Displays	5,532	\$8,692	\$1,571.00
2004	Digital TV Sets and Displays	8,002	\$12,300	\$1,537.00
2005	Digital TV Sets and Displays	10,719	\$15,043	\$1,403.00
2006	Digital TV Sets and Displays	22,366	\$22,696	\$1,015.00
2007	Digital TV Sets and Displays	24,966	\$24,519	\$982.00
2008	Digital TV Sets and Displays	31,153	\$25,827	\$829.00
2009	Digital TV Sets and Displays	34,799	\$22,407	\$644.00
2010	Digital TV Sets and Displays	34,659	\$20,120	\$581.00
2011	Digital TV Sets and Displays	33,781	\$18,150	\$537.00
2012	Digital TV Sets and Displays	40,310	\$19,866	\$493.00
2013	Digital TV Sets and Displays	39,191	\$19,385	\$495.00
2014	Digital TV Sets and Displays	37,587	\$19,388	\$516.00
2016	Digital TV Sets and Displays	39,678	\$20,042	\$505
2017	Digital TV Sets and Displays	39,562	\$21,000	\$531
2003	HDTV (720p, 1080i, 1080p)	3,735	\$6,253	\$1,674
2004	HDTV (720p, 1080i, 1080p)	6,091	\$9,212	\$1,512
2005	HDTV (720p, 1080i, 1080p)	8,803	\$11,547	\$1,312
2006	HDTV (720p, 1080i, 1080p)	17,268	\$18,410	\$1,066
2007	HDTV (720p, 1080i, 1080p)	20,722	\$19,439	\$938
2008	HDTV (720p, 1080i, 1080p)	26,192	\$23,677	\$904
2009	HDTV (720p, 1080i, 1080p)	29,662	\$21,670	\$731
2010	HDTV (720p, 1080i, 1080p)	33,619	\$19,600	\$583
2011	HDTV (720p, 1080i, 1080p)	33,781	\$18,151	\$537
2012	HDTV (720p, 1080i, 1080p)	40,310	\$19,866	\$493
2013	HDTV (720p, 1080i, 1080p)	39,191	\$19,385	\$495
2014	HDTV (720p, 1080i, 1080p)	37,587	\$19,388	\$516
2015	HDTV (720p, 1080i, 1080p)	32,824	\$11,765	\$358
2016	HDTV (720p, 1080i, 1080p)	24,658	\$7,852	\$318
2012	4K Ultra HD TV	1	\$22	\$22,000
2013	4K Ultra HD TV	77	\$310	\$4,026
2014	4K Ultra HD TV	1,431	\$2,238	\$1,564
2015	4K Ultra HD TV	7,322	\$7,673	\$1,048
2016	4K Ultra HD TV	10,000	\$10,000	\$1,000

Source: Consumer Technology Association U.S. Consumer Technology Sales & Forecasts, July 2016 edition. Reprinted with permission.