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Frontier

Your Guide to the 2024-25
Upfronts **NewFronts**
Planning Season

◀▶▶ Nielsen

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Have we entered a time loop?

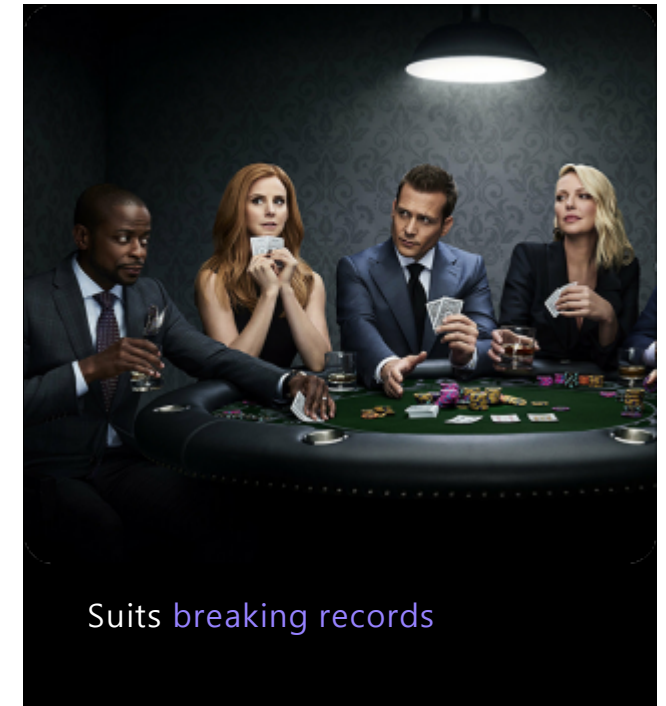
If you're just back on Terra after a 20-year mission on the USS Enterprise, you're likely to do a double take when you see that the programs on TV screens today are the same that played before you left (NCIS came out in 2003, Grey's Anatomy and Criminal Minds in 2005). The screens are flatter, and you'd have to turn to Paramount+ instead of UPN to see your own Star Trek adventures now, but many of the most-popular programs are the same.

Is streaming the latest incarnation of TV syndication?

While top quality content will always find its way to the screen, the way that people are consuming that content today is radically different than it was only a few years ago. And those changes in viewing behavior, in turn, are transforming the industry.

How do you navigate these changes?

To help you chart your course, we put this guide together highlighting three paradigm shifts for the 2024-2025 Upfronts/





GREY'S ANATOMY

CRIMINAL MINDS

NCIS

NCIS, Grey's Anatomy,
and Criminal Minds at the



Media companies
bundling channels
like it's 1999

1

Platform and programming trends

The convergence of linear and streaming is redefining the planning season

In a world where linear broadcast and cable represent just half of overall TV viewing, the traditional TV season's rule over the calendar may be shifting, and buyers and sellers need to operate with more agility and flexibility. The Upfronts still have a critical role to play, but perhaps not as a harbinger of the whole TV schedule anymore.

In section 1, we'll look closely at new platform and programming trends to illustrate the rise of Convergent TV.

2

Audience trends

Your audience today isn't the same as yesterday's

The TV experience has new personalization potential, and now that people have an infinite aisle of programming options at their fingertips, age and gender GRPs certainly don't have the same pull. Succeeding in tomorrow's TV environment means striking the right balance of contextual, advanced targeting, and one-to-one advertising. It's a new game.

In section 2, we'll examine key audience trends to demonstrate the uniqueness of today's TV viewing audiences.

3

Ad trends and outcome insights

Linear TV is big but it's only half of the equation

People spend between 4 ½ and 5 hours a day with TV (live, time-shifted and streaming), but they now spend just as much time with other media. We are entering the world of Convergent TV, where the line of what is and isn't considered "television" blurs. As such, measurement silos and incompatibilities should be a thing of the past. Advertisers want to understand how their TV buys are performing not as stand-alone investments but in the context of their cross-media campaigns.

In section 3, we'll review important cross-media considerations through current ad trends and outcomes insights.

New platform and programming trends



Section 1

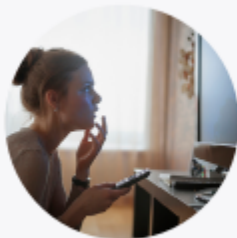
Convergent TV is redefining the planning season

TV programming has historically been a seasonal affair: dips in offerings and total use of television (TUT) during summers (when more people were on vacation and away from their TV routines) and spikes in the fall (when new programs were released to coincide with the launch of new car models and the pre-holiday shopping season). But what does seasonality mean in the streaming age?

The advent of Convergent TV over the past few years—the combination of linear and streaming into a seamless viewing experience—is transforming the TV landscape: both the way that people consume content and in the way that media companies produce and release new programming to meet that demand.

We'll answer that question through four key analyses.

vMVPD: Virtual Multichannel Video Programming Distributor, which is streaming service that offers multiple channels over the internet, such as YouTube TV and fuboTV



BBO homes have steadily climbed at a rate of 8.5% per quarter for the past three years, but the majority (82%) of BBO homes still access some type of linear content. (Figure 1.2)



TV reaches nearly 90% of the U.S. population in one form or another over the course of any given week, and the growing adoption of streaming and CTV devices may start to smooth out seasonality out of TV usage for programming beyond sports. (Figure 1.3)



Streaming usage (whether from digital-first or legacy TV companies) passed cable for the first time at the end of 2022 and is now the dominant form of TV viewing in the U.S., accounting for nearly 40% of total TV usage. (Figure 1.4)



Streaming platforms are releasing new titles (both acquired and original) throughout the calendar year, as well as dropping whole seasons at once, which raises the public's expectations for new, bingeable TV programming outside of the traditional TV season. (Figure 1.5)

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