



**Local Legal
Services Advertising**

2018 – Quarters 2 and 3

Texas

Local legal services television advertising in top media markets in Texas
2nd & 3rd Quarters of 2018

February 2019

In the second and third quarters of 2018, from April through September, nearly 6 million advertisements for legal services and/or soliciting legal claims aired on local broadcast networks in the 210 local media markets across the United States.¹ It is estimated that \$412 million were spent purchasing these ads.² Eight percent of the locally broadcasted legal services ads during this six month period aired in seven media markets in three states across the United States. These markets – Dallas, Houston, and San Antonio, Texas; New Orleans and Shreveport, Louisiana; and Lexington and Louisville, Kentucky – also accounted for nine percent of all local legal services television advertising spending during this time period. An analysis and discussion of the legal services advertising volumes in the Texas markets follows.

¹ The total estimated number of local legal services TV ads broadcast during this time period was 5,929,759.

This total and other TV advertising data cited in this report does not include legal services TV advertisements broadcast nationally on national cable and broadcast networks or during nationally syndicated programming nor does it include local cable television broadcasts.

Data and analysis on television advertisements in this report are provided by X Ante using Kantar CMAG data.

² An estimated \$411,983,301 were spent on legal services TV ads during this period. Ad spending figures are estimates based on publicly-available ad rate information. Data are estimates and may vary over time due to revisions to account for duplicates or errors and the availability of updated ad rate information.

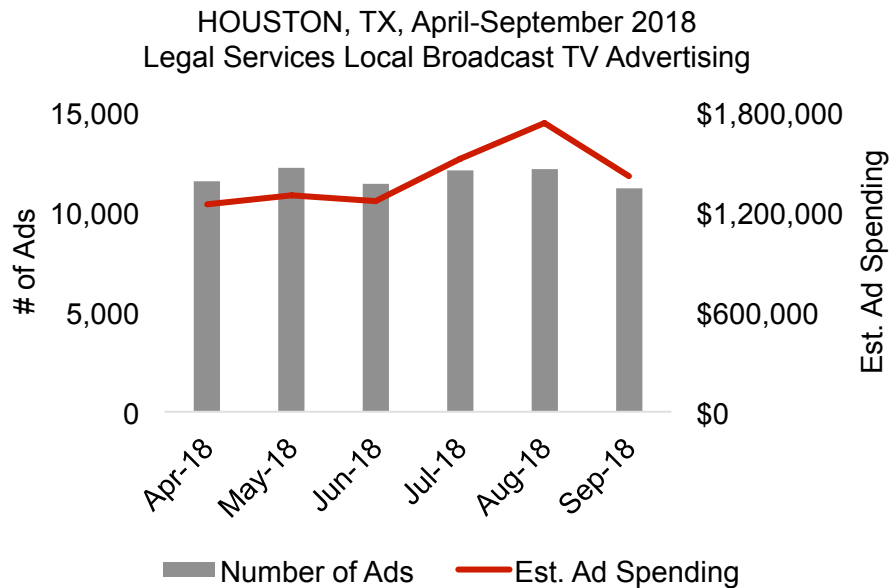
TEXAS

Texas is the second most populous state in the nation and Dallas-Ft. Worth, Houston and San Antonio are the three largest media markets in the state. Dallas-Ft. Worth and Houston are among the Top 10 media markets in the country ranking as No. 5 and No. 7 with 2.6 million and 2.4 million television households each. San Antonio is the 31st largest media market in the country with 900,000 television households.³

From April through September 2018, advertisers spent a daily average of more than \$40,000 to air more than 300 local TV ads for legal services in each of the three largest media markets in Texas. The more than \$23 million spent collectively in Dallas, Houston, and San Antonio purchased more than 190,000 ads.

Houston

Estimated locally broadcast legal services advertising in Houston jumped 23 percent in the third quarter of 2018 from \$3.8 million to \$4.7 million. This averages about \$51,000 spent every day in Houston on these ads. However, the number of ads aired each quarter was relatively consistent between the two quarters at about 35,000 ads aired per three-month period. This was likely due to greater competition and higher ad rates surrounding the election season.



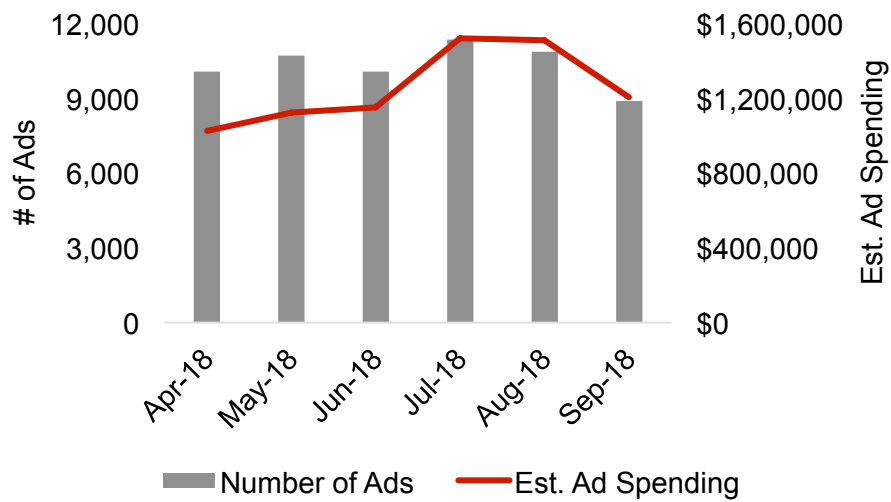
There were 19 times as many legal services ads running locally in the Houston market in the third quarter of 2018 as there were ads for pizza delivery and restaurants.

Dallas-Ft. Worth

With 2.6 million television households, Dallas-Ft. Worth is the largest media market in Texas and the fifth largest in the country. From April through September, an estimated \$7.5 million were spent to air 62,000 legal services ads. While the number of ads aired in both Dallas-Ft. Worth and Houston markets were relatively unchanged between the second and third quarters, Dallas-Ft. Worth experienced a greater rate of increase in advertising spending – a 28 percent increase in Dallas-Ft. Worth versus a 23 percent increase in Houston.

³ Nielsen's ranking of local television markets and estimates of their size for the 2018-2019 television season can be found at: <https://www.nielsen.com/content/dam/corporate/us/en/public%20factsheets/tv/2018-19-dma-ranker.pdf>

DALLAS-FT. WORTH, TX, April-September 2018
Legal Services Local Broadcast TV Advertising

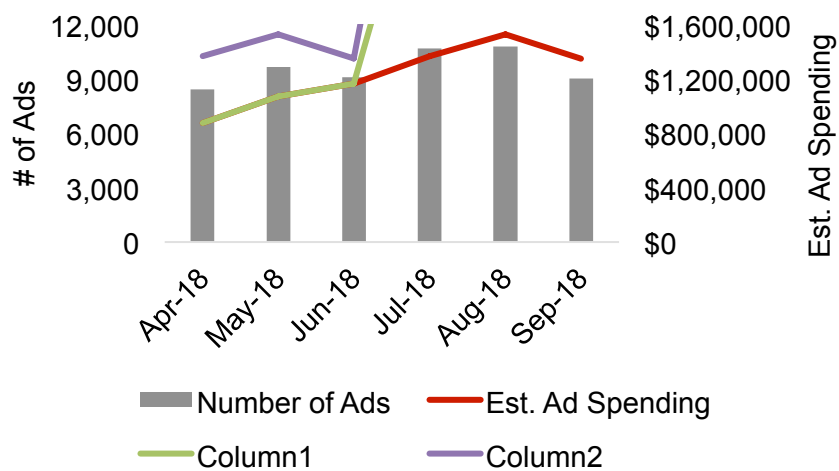


Eleven times as many local legal services ads aired in Dallas-Ft. Worth as ads for home centers and hardware stores in the third quarter of 2018.

San Antonio

The third largest media market in Texas – San Antonio – saw the steepest quarterly increase in legal services ad spending of the three Texas markets examined. An estimated 37 percent or \$1.1 million more were spent to air these ads in the third quarter of 2018 than was spent in the second quarter. Fewer legal services ads aired in San Antonio between April and September compared to the other two markets – about 58,000 ads total – but the amount spent on these ads – \$7.4 million – was comparable to the amount spent in Dallas during the same time period.

SAN ANTONIO, TX, April-September 2018
Legal Services Local Broadcast TV Advertising



Legal services ads ran 12 times as often as local ads for clothing stores in San Antonio from July through September.

Source material

Data analysis in this report provided by X Ante used data from Kantar Media CMAG. X Ante monitors and reports on advertising and monitoring by lawyers, law firms and other soliciting legal claims on television, radio, online, social media and elsewhere. The television advertising coverage includes expenditures and commercial occurrences by attorneys and law firms in 210 media markets and on 12 national broadcast networks, eight Spanish-language networks and more than 80 national cable networks. X Ante has provided this data and analysis to prominent law firms and Fortune 500 companies.

Materials reviewed

In compiling this report, X Ante examined comprehensive data sets on commercial occurrence and expenditure information for television advertisements sponsored by attorneys and/or law firms seeking claimants on local broadcast television networks in the selected media markets.

The data examined included monthly totals of estimated spending on legal services advertising and the number of times these ads aired each month from April 2018 through September 2018.

The data was gathered and provided by the Campaign Media Analysis Group (CMAG), a Kantar Media Solution, that monitors, codes and aggregates television advertising information 21 hours a day (5:00 AM - 2:00 AM) utilizing the MediaWatch Technology – an automated, patented and proprietary system. The monitored stations constitute the principal stations in each market, typically including the network affiliates and major independents.

CMAG staff watch, review, and code every ad to determine the messages used in each and the content information is merged with the automated placement and spending information.

The system is designed to capture new commercials as they first air and then track every succeeding airing of each commercial across the universe of TV platforms outlined above.

The spot occurrence and placement data are automatically assigned by the system. The spending rates are estimated according to quarterly polling by Kantar Media of television stations and advertising industry sources to determine average 30-second advertising daypart-level rates and program rates for sports and special programming for the upcoming quarter. To account for the time it takes for any given rate to populate within the system, CMAG uses an average cost function based on rates from historical program averages airing in the same market on the same station during the same daypart. These temporary estimates are updated with actual sourced rates when they become available.

Several weeks after the local data is produced, Kantar Media receives the results from a national broadcasting industry survey conducted monthly by the Television Bureau of Advertising (TVB). This new information provides a national advertising growth trend as reported by responding stations. Expenditures are adjusted to reflect these industry spot revenue patterns. Once this final rate data is available, all temporary rates calculated using the average cost function are replaced with the final data.