



**Local Legal  
Services Advertising**

**2018 – Quarter 4**

**Texas**

**Local Legal Services TV Advertising  
Texas Top Markets  
4<sup>th</sup> Quarter of 2018**

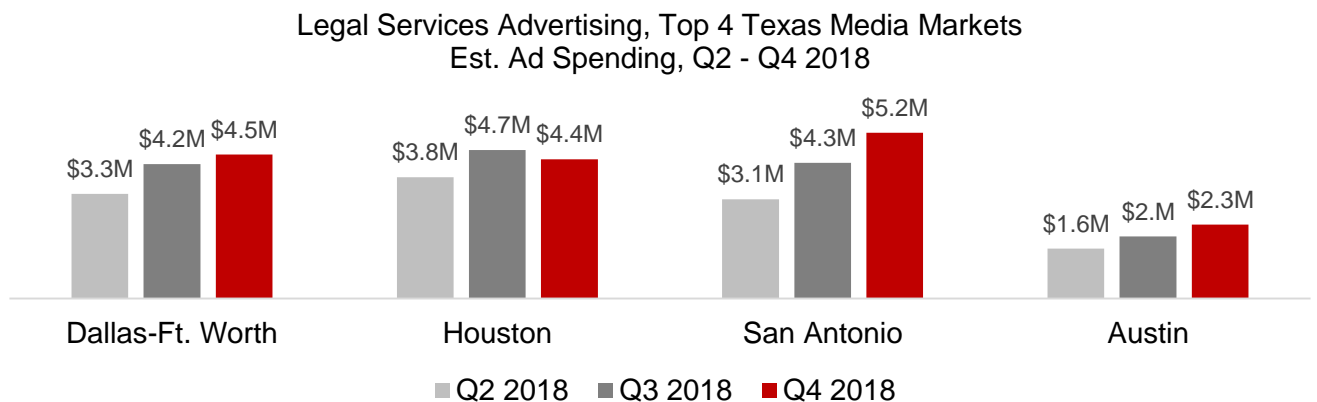
April 2019

Texas is the second-most populous state in the nation and its four largest media markets include Dallas-Ft. Worth, Houston, San Antonio, and Austin. Dallas-Ft. Worth and Houston are the fifth and the seventh largest media markets in the U.S., with 2.6 million and 2.4 million respective television households. San Antonio, the third largest media market in Texas, is the 31<sup>st</sup> largest media market in the country, with 900,000 television households. The 4<sup>th</sup> largest Texas market, Austin, ranks 40<sup>th</sup> in the nation with just under 752,000 television households.<sup>1</sup>

In the fourth quarter of 2018, an average of one legal services ad aired locally every minute across these four Texas media markets. From October through December, 132,359 legal services ads aired at an estimated cost of \$16.4 million. This was \$1.3 million more than what was spent in the prior quarter on legal services ads.<sup>2</sup>

An average of \$4.1 million was spent in each of the four markets, with the most ad spending occurring in San Antonio. Houston saw the highest number of legal services ads aired, with 35,027 during the three-month period, edging just beyond the number of ads aired in San Antonio.

An analysis and discussion of the legal services advertising volumes and spending in these markets follows.

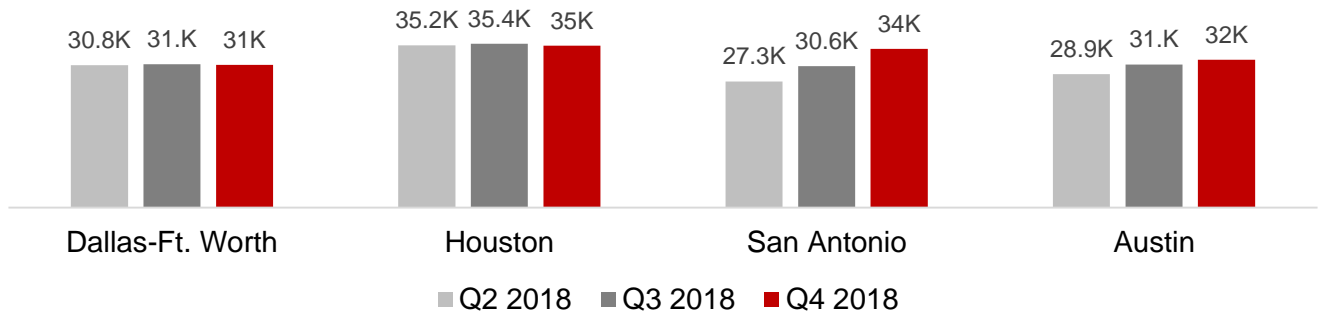


<sup>1</sup> Nielsen's ranking of local television markets and estimates of their size for the 2018-2019 television season can be found at: <https://www.nielsen.com/content/dam/corporate/us/en/public%20factsheets/tv/2018-19-dma-ranker.pdf>

<sup>2</sup> Data analysis by X Ante utilizing Kantar CMAG data.

Local TV advertising captures ads related to legal services and/or the solicitation of legal claims on local broadcast networks. 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.

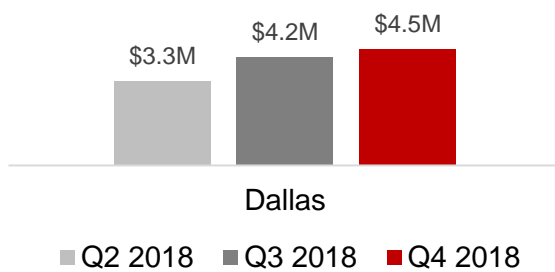
Legal Services Advertising, Top 4 Texas Media Markets  
Number of Ads, Q2 - Q4 2018



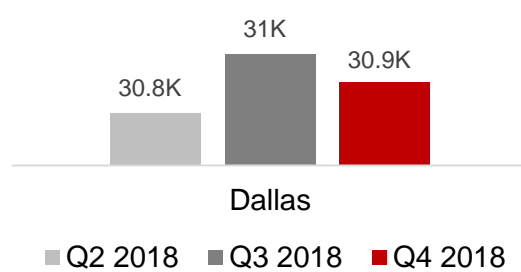
*Dallas-Ft. Worth*

From October through December 2018, an estimated \$4.5 million was spent to air 30,923 legal services ads in the Dallas-Ft. Worth media market. While this is a \$300,000 spending increase over the previous quarter, the number of ads aired in the 3<sup>rd</sup> and 4<sup>th</sup> quarters remains relatively consistent. An average of 336 legal services ads per day, or 14 ads per hour, aired locally in the Dallas-Ft. Worth market.

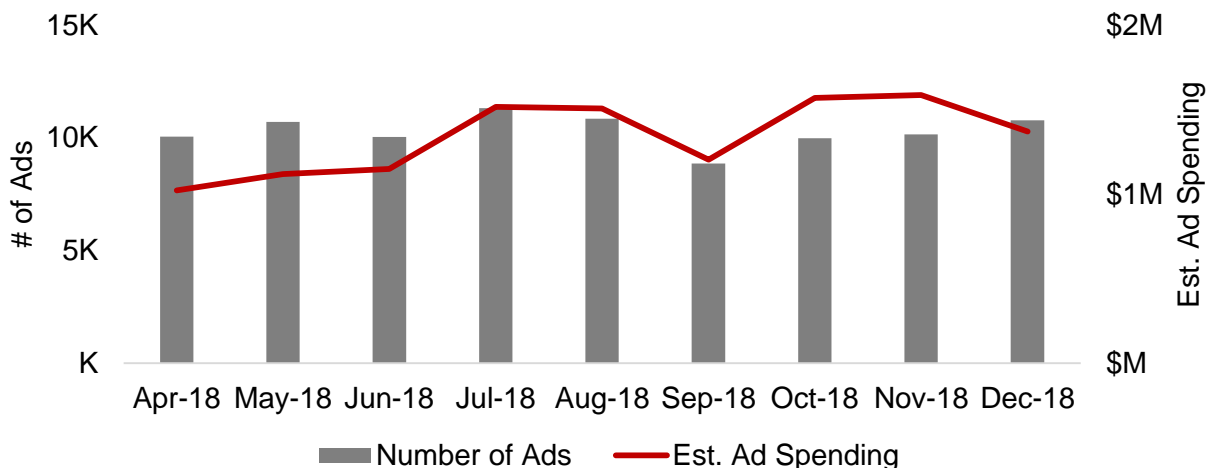
Legal Services Advertising,  
Est. Ad Spending, Q2 - Q4 2018



Legal Services Advertising,  
Number of Ads, Q2 - Q4 2018



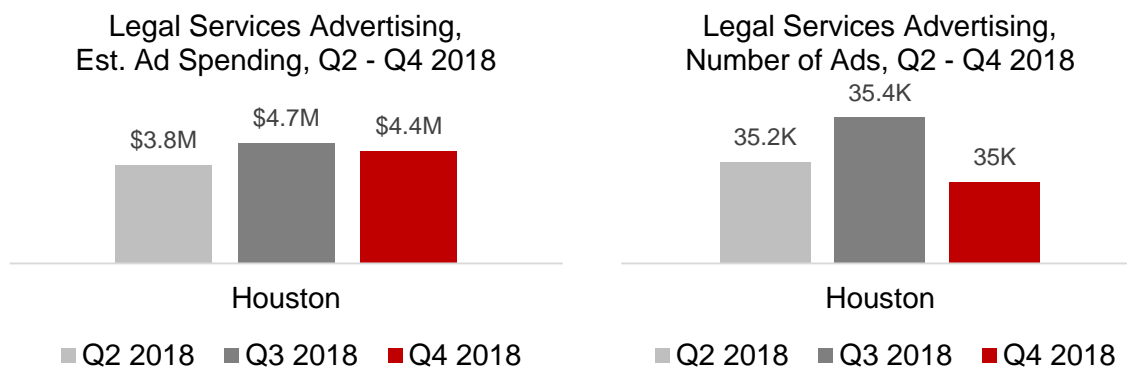
Dallas-Ft. Worth, April - December 2018  
 Monthly Legal Services Local Broadcast TV Advertising

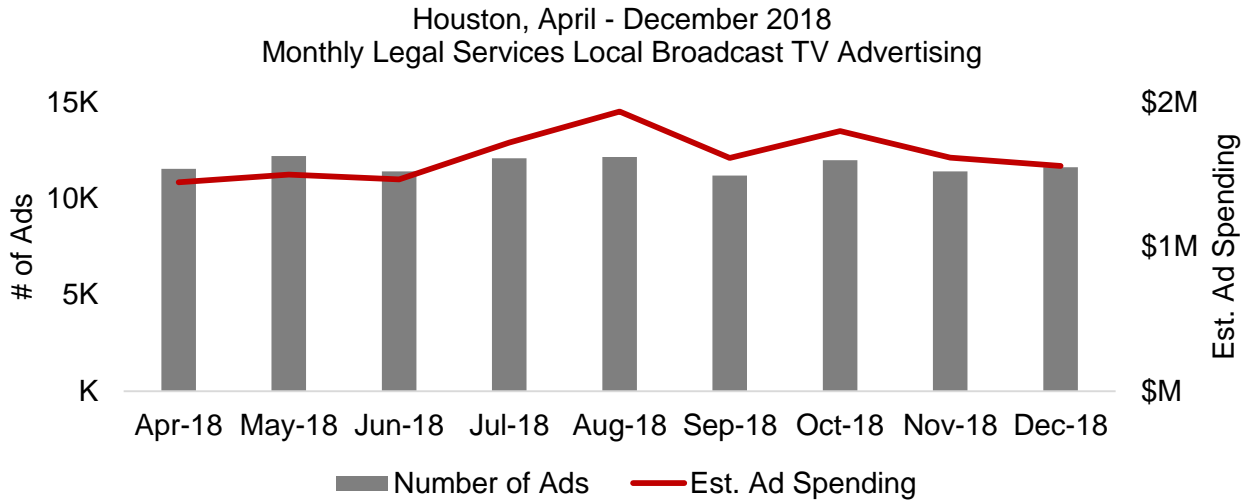


For every auto insurance ad that aired on local Dallas TV stations in the 4<sup>th</sup> quarter, seven ads were broadcast soliciting litigation claims and/or advertising legal services. For every local ad for home centers and hardware stores, 22 legal services ads aired.

**Houston**

Continuing the trend in the previous two quarters, 4<sup>th</sup> quarter advertising activity in Houston remained relatively consistent with 35,027 ads airing. Estimated spending for locally broadcast, legal services advertising in Houston fell slightly to \$4.4 million in the 4<sup>th</sup> quarter from \$4.7 million in the 3<sup>rd</sup> quarter, with average daily spending on these ads reaching approximately \$48,000.

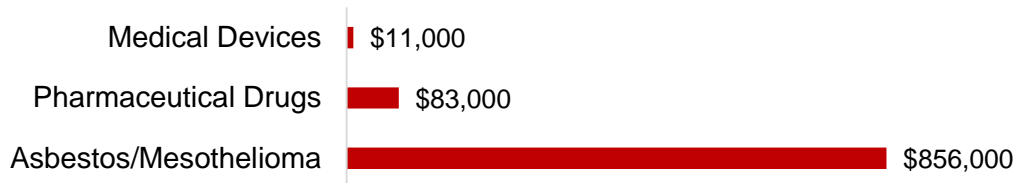




From October through December, there were 12 times as many legal services ads broadcast during local television programming in Houston as there were commercials advertising banks.

Approximately 22% of estimated spending on local legal services TV advertising in Houston in the 4<sup>th</sup> quarter focused on ads soliciting claims related to mesothelioma and other asbestos-related risks and conditions, pharmaceutical drugs, and medical devices.

#### Estimated Spending on Top Legal Services Advertising in Houston, Q4 2018

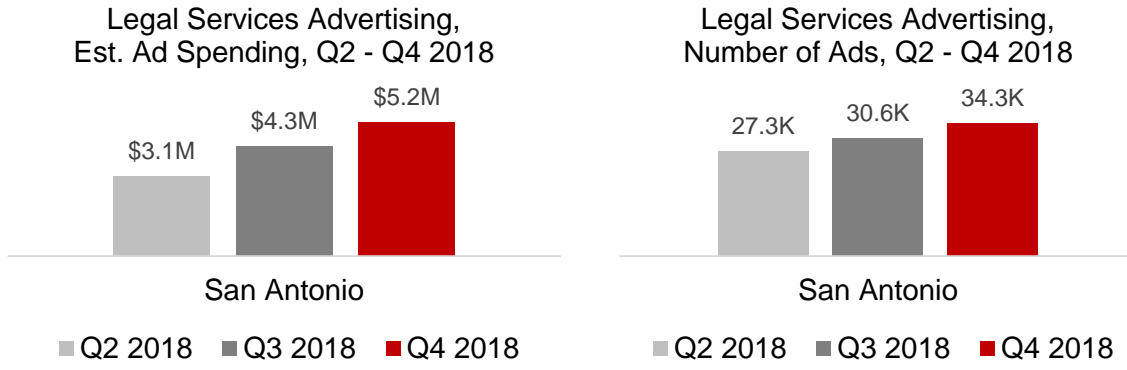


### ***San Antonio***

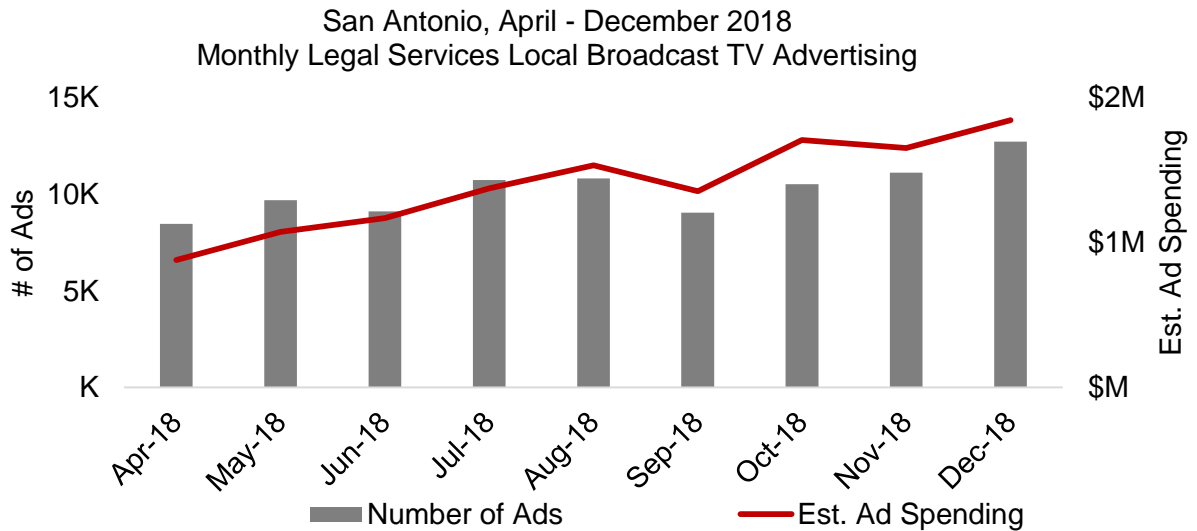
San Antonio experienced the steepest quarterly increase in legal services ad spending of all four Texas markets examined in this report. Estimated legal services ad spending increased by nearly \$1 million, or 22%, when comparing 3<sup>rd</sup> and 4<sup>th</sup> quarter spending in San Antonio. Spending increased by \$2 million when comparing 2<sup>nd</sup> and 4<sup>th</sup> quarter spending.

These amounts are particularly striking given the size of the San Antonio market. Although it is approximately one-third of the size of the Dallas or Houston media markets, more money was spent on legal services ads in San Antonio in the 4<sup>th</sup> quarter of 2018 than in either of the aforementioned markets.

Furthermore, San Antonio had just 643 fewer ads than aired in Houston, where the most legal services ads were aired in the 4<sup>th</sup> quarter. The 34,384 local legal services ads aired in San Antonio from October through December represent a 12% increase over the 3<sup>rd</sup> quarter of 2018.



Monthly local legal services advertising volume and estimated spending has increased every month since April with the exception of a slight dip in September. Advertising spending in December was more than twice the April amount.

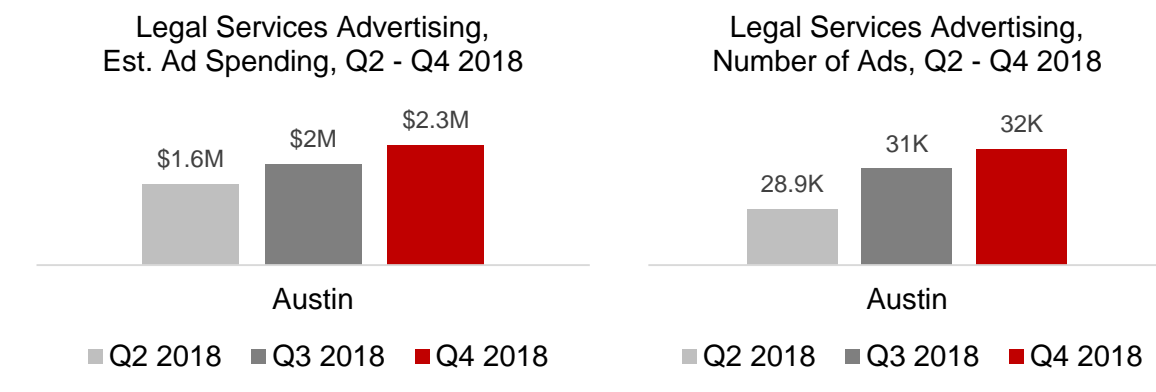


Legal services ads in San Antonio ran more frequently than ads for many popular advertisers in the 4<sup>th</sup> quarter of 2018. For every wireless telecom provider ad that ran locally in San Antonio from October through December, 18 legal services ads aired. Similarly, there were eight legal services ads for every local ad for food stores and supermarkets.

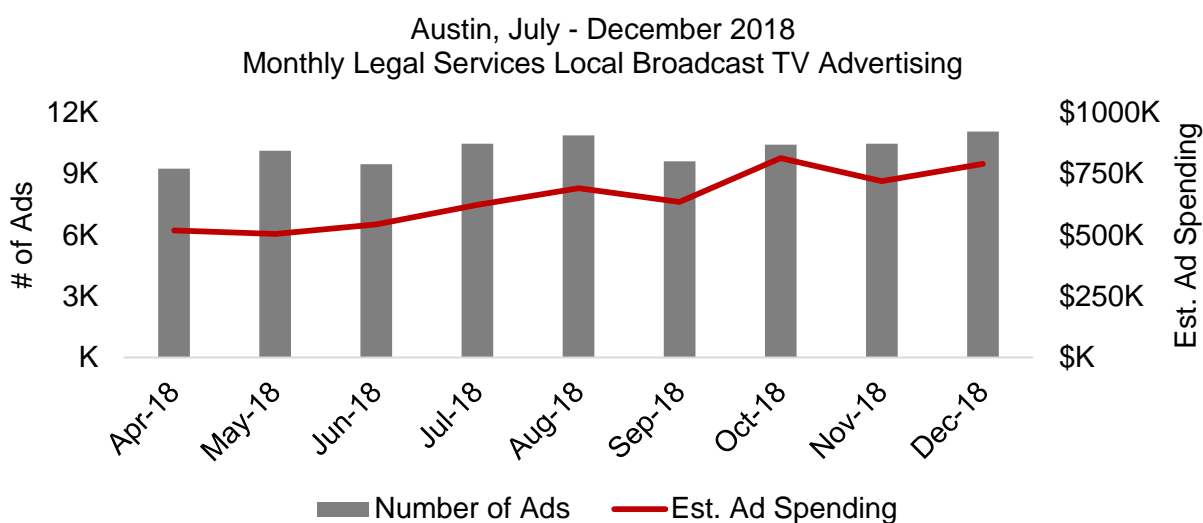
***Austin***

During the last quarter of 2018, more than 750,000 television households in Austin were exposed to a daily average of 348 locally-broadcast legal service ads, or approximately 15 ads per hour. Estimated advertising spending topped \$2.3 million for 32,025 legal services advertisements. This represents a slight increase in the number of ads aired when compared with the 2<sup>nd</sup> quarter, but shows an increase of nearly 20% in the dollar amount spent on these ads.

Although Austin is the smallest of the four major Texas television media markets examined, viewers in Austin saw 1,102 more ads than viewers in Dallas-Ft. Worth, the largest Texas market.



Austin's 4<sup>th</sup> quarter began with high advertising volumes in October, when 10,448 ads aired at an estimated cost of \$814,852. Advertising volume remained high in November, though estimated spending dipped to \$720,575. The quarter's ad count finished at a six-month high in December when 11,086 ads aired.



As with the other major Texas media markets, legal services ads in Austin ran more frequently than ads for many popular advertisers in the 4<sup>th</sup> quarter of 2018. Eight local legal services ads aired for every supermarket ad, and there were four times as many legal services ads as there were ads for fast food restaurants.

## 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, 8 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 December 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.