CONTENT STRATEGY FLASH REPORT

NETWORK PRIMETIME PROGRAMMING

Flash #5 - 12 November 2018

KATZ

The 2018-19 primetime season has reached a point where the networks have solidified their "winning nights", where the strongest established programs have proven their continued success and the freshman "cream of the crop" have risen to the top and made their mark in primetime. While there are no series that have "officially" been cancelled, there are some exhibiting signs that their future is questionable. While last season 10 DAYS IN THE VALLEY that was the first series to be relegated to Saturday night on ABC, this season it is THE ALEC BALDWIN SHOW. I FEEL BAD has been taken off NBC's schedule in December with a question mark on its return. With that said, we have reviewed the first four solid weeks of the new season with a focus on time-shifted viewing. After the holidays, as the mid-season/winter schedule emerges, new programs will premiere, football will be off the field and new pieces of the primetime puzzle will come to light.

This week's FLASH #5 includes:

	BY THE NUMBERS overall network primetime performance	Pages 1-3
	SCORECARD: NEW FACES OF FALL Top 20 Performers	Page 3
-	NOW OR LATER – time-shifted viewing results	Pages 4-7
	ARE YOU READY FOR SOME NFL FOOTBALL – primetime network & cable status	Pages 7-8
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TAKE-AWAY HEADLINES

- For time-shifted viewing, the programs registering the highest percentage changes from their L+SD to L+7 performances are not necessarily the same series that exhibit the most substantial share growth from one data stream to the other. The actual percentages can be misleading.
- ABC's A MILLION LITTLE THINGS topped the HH charts percentage-wise, up 91% (from a 6 to an 11 share). The freshman drama was also up 120% in A18-49 (from a 4 to a 9 share) and up 116% in A25-54 (from a 5 to a 10 share) from its L+SD to its L+7 delivery. A very similar performance to DESIGNATED SURVIVOR's year ago time shifted viewing. In A25-54, A MILLION LITTLE THINGS was 2nd in its percent hike behind THE GOOD DOCTOR.
- MANIFEST, THE GOOD DOCTOR, THIS IS US and THE BIG BANG THEORY were among the series which achieved the most substantial actual share gains between L+SD and L+7 data.
- On average, NBC's SUNDAY NIGHT FOOTBALL has achieved a 10% gain in P2+ from last Fall's first nine-game average.
- What have people thought of THE CONNERS? Our Media Panel found that 62% of people who've seen the show plan to watch future episodes of THE CONNERS. See more results on page 9.

BY THE NUMBERS

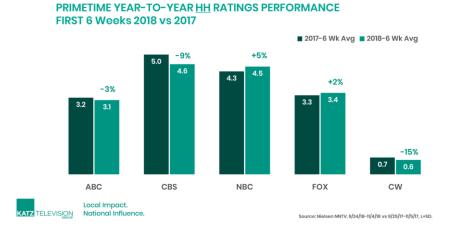
Please see below and the attached *excel* document for all the details.

Keep in mind percent differences are based on ratings and shares that go out many decimal places on the excel chart. Overall Primetime Network Performance L+SD – Six weeks into the new season

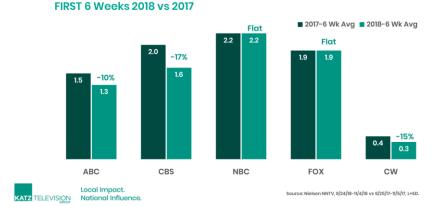
CBS achieved 1st place status in HH's (4.6/9 NTI) for the first six weeks of the new season, bypassing NBC by one-tenth of a rating point (4.5/9) while NBC was the designated winner among key adults (1.7/7 A18-49, 2.2/8 A25-54). CBS ranked 3rd among A18-49 (1.1/5) and A25-54 (1.6/6) behind FOX.



- FOX and NBC remained relatively flat across the key demos versus year ago..
- ABC placed 3rd in HH's (3.1/6) and 4th across the key demos (1.0/4 A18-49, 1.3/5 A25-54), posting minimal declines over same time year ago.
- Though placing 5th in every key demo category, the CW only experienced minimal declines over year ago.



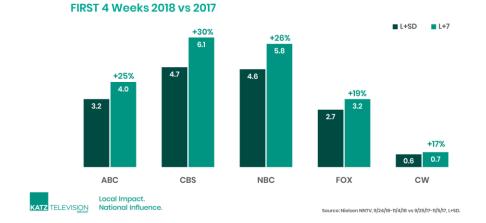
PRIMETIME YEAR-TO-YEAR A25-54 RATINGS PERFORMANCE



Overall Primetime Network Performance L+SD versus L+7 – Four weeks into the new season

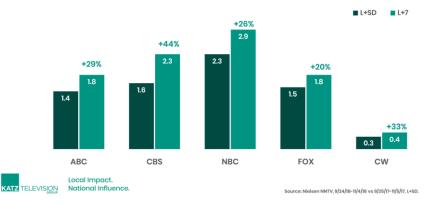
- After examining the time shifted viewing for the first four weeks of the season, while the actual ratings performance increases, the difference in the overall standings of the networks in primetime did not change; CBS was #1 in HH's in both data streams; NBC was second; ABC 3rd, FOX 4th and the CW 5th.
- The same held true in A25-54 with one minor exception. NBC was #1 in both data streams, CBS was 2nd and the CW was 5th. FOX was 3rd in L+SD by one-tenth of a rating point over ABC while the two networks tied for 3rd in L+7 data.





PRIMETIME HH RATINGS PERFORMANCE - L+SD versus L+7

PRIMETIME <u>A25-54</u> RATINGS PERFORMANCE – L+SD versus L+7 FIRST 4 Weeks 2018 vs 2017



SCORECARD: NEW FACES OF FALL ... Top 20 Performers



... all were given full season orders -- along with a bunch of other series.



NOW OR LATER ... Time-Shifted Program Viewing

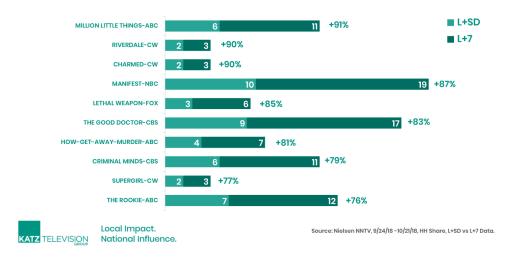
In today's hectic world, between broadcast television, advertiser supported and pay cable and OTT, there are just too many series to choose from and too many "good" programs airing at the same time. These are a couple of the reasons viewers elect to watch "their shows" on their own time table either episode-by-episode or by binge-watching. The advent of the DVR, On Demand, You Tube and Hulu, to name a few services, have made this out-of-pattern viewing possible.

With a solid four weeks of L+SD versus L+7 data available for comparison, time-shifted viewing can make a huge difference to the overall performance of a series. Keep in mind that the programs registering the highest percentage changes from their L+SD to L+7 performances are not necessarily the same series that exhibit the most substantial share growth from one data stream to the other. The percentages can be misleading as we can see from the charts below. (Also, see the attached excel file for all the details.)

By Percentage

Keep in mind percent differences are based on ratings and shares that go out many decimal places on the excel chart and not with the rounded numbers seen below on the charts.

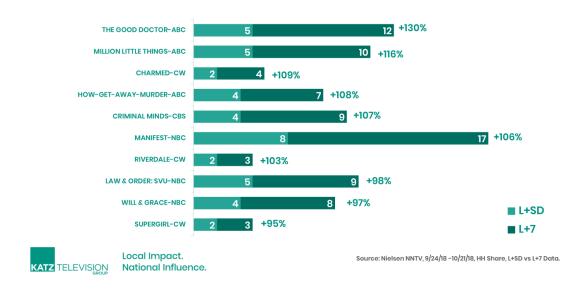
- ABC's A MILLION LITTLE THINGS topped the HH charts, up 91% (from a 6 to an 11 share). The freshman drama was also up 120% in A18-49 (from a 4 to a 9 share) and up 116% in A25-54 (from a 5 to a 10 share) from its L+SD to its L+7 delivery. A very similar performance to DESIGNATED SURVIVOR's year ago time shifted viewing. In A25-54 THINGS was 2nd in its percent hike behind THE GOOD DOCTOR.
- The CW's RIVERDALE and CHARMED tied for 2nd in HH's (+90%) with RIVERDALE slightly higher in A18-49 (+131% versus 108%) and CHARMED ahead in A25-54 (+116% versus 103%).
- THE GOOD DOCTOR achieved #1 status in both A18-49 (131%, tied with RIVERDALE) and A25-54 (130%) gains, from a 5 to an 11 share and a 5 to a 12 share, respectively.
- Other programs in the top ten of percent gains ranging from +79% to +87% in HH's, +106% to +122% in A18-49 and +106% to +108% in A25-54 from L+SD to L+7 included MANIFEST, HOW TO GET AWAY WITH MURDER and CRIMINAL MINDS.
- LAW & ORDER: SVU and WILL & GRACE were top 10'ers in A18-49 (104%, 98%, respectively) and A25-54 (+98%, +97%) data stream gains.
- SUPERGIRL was among the top in HH's (+77%) and A25-54 (95%) with THE ROOKIE topping in HH's only (+76%) and BULL in A18-49 (+104%) only.



PRIMETIME <u>HH SHARE</u> PERFORMANCE – TOP SERIES by Percent Increase LIVE+SD versus L+7



PRIMETIME <u>A25-54 SHARE</u> PERFORMANCE - TOP SERIES by Percent Increase LIVE+SD versus L+7



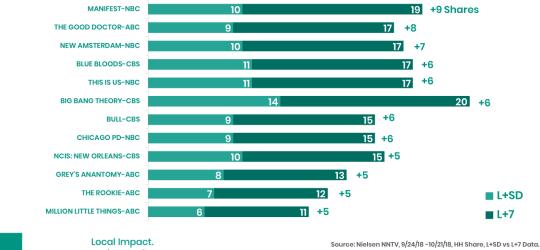
By Actual Share Growth

The examination of share surges for the primetime series (L+SD vs L+7) conveyed a slightly different story than the percentages. Though there were some commonalities.

- MANIFEST, THE GOOD DOCTOR, THIS IS US and THE BIG BANG THEORY were among the series which achieved the most substantial actual share gains between L+SD and L+7 data.
 - MANIFEST boasted increases of 9 share points in HH's (from a 5.3/10 to a 9.9/19) and A25-54 (from a 2.4/8 to a 5.0/17) with an 8-share point increase in A18-49 (from a 1.7/7 to a 3.6/15).
 - THE GOOD DOCTOR registered an 8-share increase in HH's (from a 4.7/9 to an 8.5/17), a 6-share point bump in A18-49 (from a 1.1/5 to a 2.6/11) and was up 7 shares in A25-54 (from a 1.5/5 to a 3.5/12).
 - THIS IS US boosted its L+SD versus L+7 performance from an 11 share to a 17 in HH's, from a 10 share to a 17 in A18-49 and from a 10 share to an 18 in A25-54.
 - > THE BIG BANG THEORY was up from a 14 to a 20 share in HH's, from a 10 to a 17 in A18-49 and from a 13 to a 20 in A25-54.
- Other series to grow its shares by at least 5 points and above in HH's as well as across the key demos included NEW AMSTERDAM, CHICAGO PD, GREY'S ANATOMY and A MILLION LITTLE THINGS.
- BULL turned in a top 10 growth performance in HH's (+6 shares) and A25-54 (+5 shares).
- BLUE BLOODS posted an increase from an 11 to a 17 share, NCIS: NEW ORLEANS was up from a 10 to a 15 share and THE ROOKIE was up from a 7 to a 12 share in HH's only. LAW & ORDER: SVU grew from a 4 share to a 9 in A18-29 only.
- LAST MAN STANDING, 9-1-1 and CRIMINAL MINDS each earned a 5-share point increase in A25-54 only.



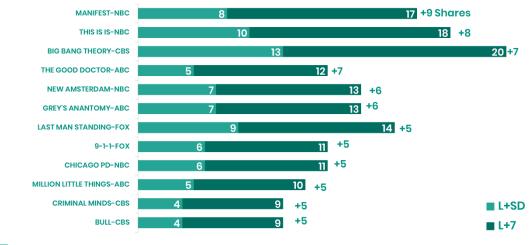
PRIMETIME HH SHARE PERFORMANCE - TOP SERIES by SHARE GROWTH LIVE+SD versus L+7 / Weeks 1-4





National Influence.

PRIMETIME <u>A25-54 SHARE</u> PERFORMANCE – TOP SERIES by SHARE GROWTH LIVE+SD versus L+7





Local Impact. National Influence.

Source: Nielsen NNTV, 9/24/18 -10/21/18, A25-54 Share, L+SD vs L+7 Data.



By Genre

By breaking the results of L+SD versus L+7 viewing down by genre, we can see where the categories stand. There really aren't any surprises here.

- Most of the primetime landscape consists of scripted shows, which, as expected, garnered the more considerable gains with dramas slightly ahead of sitcoms.
- Sporting events were more often watched live and didn't show much, if any, increase from L+SD to L+7 data.
- While competition shows post somewhat of a slight increase, it didn't come close to the growth of the scripted shows over 7 days.
- Scripted series also tended to move up the ranking while live shows and sports moved down.
- For a detailed look, go to the attached excel file, L+SD versus L+7-four-week average ranking.

ARE YOU READY FOR SOME PRIMETIME FOOTBALL?

 NBC's SUNDAY NIGHT FOOTBALL scores a touchdown each Sunday night, garnering slight increases over Fall 2017 total viewership on most weeks with the largest boost this past Sunday with the Green Bay/New England match-up.

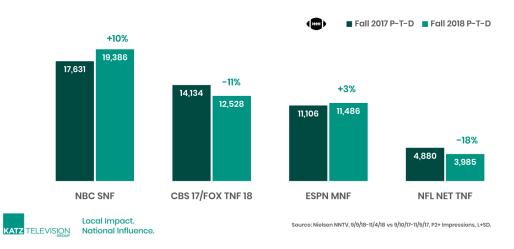


NBC SUNDAY NIGHT FOOTBALL: YEAR-TO-YEAR P2+ (000s) PERFORMANCE

- The same does not necessarily hold true for the NFL in Primetime on FOX and the NFL Network, but ESPN also turned in a slight increase. On average, SNF achieved a 10% gain in P2+ from last Fall's first ninegame average.
- ESPN's overall eight-week average of the season so far for MONDAY NIGHT FOOTBALL was up 3% in P2+ from year ago.
- With six weeks under its belt, FOX's THURSDAY NIGHT FOOTBALL turned in very slight declines over CBS' performance last Fall, -11% in total viewers.
- The NFL NETWORK's THURSDAY NIGHT FOOTBALL airings averaged an 18% down turn from year ago among P2+, posting a decline each week of this season, except for week two.



NFL PRIMETIME FOOTBALL: YEAR-TO-YEAR P2+ (000s) PERFORMANCE



SPOTLIGHT ... THE CONNERS

NTI Performance

Much anticipation, much controversy and many questions surrounded the ROSEANNE spin-off premiere of THE CONNERS this season. Would people watch the show without one of its creators and star? Would ABC benefit from the same ratings performance as its predecessor? Would social media play a part in its success or failure?



- THE CONNERS three-week L+SD average put the show among the top 15 in HH's (5.6/10, #12) and the top 10 among A18-49 (2.0/9, #7) and A25-54 (2.8/10, #7T), not ROSEANNE reboot opening numbers, but still above year ago TP (THE MIDDLE) and a solid anchor for ABC's Tuesday night line-up.
- THE CONNERS' L+7 performance pushed the sitcom to #6T in HH's (8.7/16), #6 in A25-54 (4.5/15) and #7T in A18-49 (3.2/13).





KATZ'S OUR MEDIA PANEL

So, what have people thought of THE CONNERS? To find out, the Katz Television Group polled 400 people in the Our Media consumer panel. Here's what we found:

- 1 in 5 Americans have watched THE CONNERS since it debuted last month.
- Viewers have enjoyed THE CONNERS so far. People who've seen it are far more likely to say they like the show than dislike it by a 3 to 1 margin.
- Overall, CONNERS' viewers approve of the way the writers handled Roseanne's "death" with 6 in 10 saying it was done well.
- 62% of people who've seen the show plan to watch future episodes of THE CONNERS.

RANDOM COMMENTS FROM OUR MEDIA Panel Poll

- I don't agree with the firing of Roseanne. Her apology should have been enough. Ruining someone's lifelong career over something like this is appalling. Everyone needs a second chance and her apology should've been sufficient.
- > IT WAS MUCH BETTER WITH Roseanne on the show
- > It was much better with Roseanne. Not as funny without her.
- not as good as Roseanne
- Bring Roseanne back
- > It's needs Rosanne!! Not as funny without her
- I think the cast has done a good job of pulling together after the death of the character of Roseanne Conner. To me, actress Laurie Metcalf is a stand out. I like that they included the annual Halloween episode.
- They went to extremes firing a comedian. Used to be able to say things, they seem to be restricted now even by social media. Which used to be just a platform to speak, it now can affect your job and I don't agree with that at all. Remove social media if you can no longer just use it as a platform to speak your mind.
- Rosanne....good riddance!
- It is interesting that Dan has a more active role in the show, after Roseanne is gone.
- I enjoy the remaining characters. (Always found Roseanne to be bit edgy and abrasive anyway!). I really like the diverse set of REAL, everyday issues they continue to address while keeping in mind how important love and family are.
- don't cancel this WONDERFUL show with a great cast and crew who NEED their jobs as much as we NEED the CONNERS on tv!
- Love the show.
- > Not interested in the show
- It's a sitcom but it's real. It deals with what's going on with families in America's heartland at the moment. Very well done.
- > More Johnny Galiecki
- > It's not the same. Wish Rosanne was still on it.
- It's not any worse without Roseanne
- Becky is known to drink, but if she has an alcohol problem, maybe they should address alcoholism & sobriety, have her go to AA, showing how hard it is to deal with this disease at the same time as dealing with life's major (or even minor) issues like losing a family member.
- > Better without Roseanne
- > It won't be the same without Roseanne, and I feel that the network made a mistake by letting her go.



WHAT'S THE BUZZ?

On the NETWORK...

THE CONNERS

THE CONNERS continue to be polarizing, but a few weeks in to the season, it appears that the boycotts have died down. Currently, most comments tend to be positive about the show's direction. With an extra episode order for the season and some decent social media numbers, it's not all looking bad for that middle-class family from Lanford.

- Ratings for THE CONNERS' Halloween episode were slightly higher than those of their week 2 ratings performance (where it aired against the World Series) and they racked up 7.8 million viewers.
- ShowBiz411 states that "ABC only ordered one extra episode to cap off the season, to end with a total of 10 episodes. However, it was always said that THE CONNERS would be a shorter run because of the actors' schedules".
- The show is set to surpass the 10k follower mark on Twitter soon, already eclipsing shows that started earlier in the season such as MAGNUM PI, SINGLE PARENTS, GOD FRIENDED ME and more.
- Social Media Buzz
 - "Find a way! Bring back Roseanne, this show is nothing without her #TheConners" (@easymarshmallow)
 - "I just watched 3 episodes of The Conners...I didn't think the show could make it without @therealroseanne, but it works! I love the new show! Really talented actors keeping it real, funny, and relevant!" (@MissyGirlTalk)

MANIFEST, THE GOOD DOCTOR and BULL

Three shows on their first, second and third season, respectively, go to battle every Monday night in the 10PM hour. In its new time slot, BULL, has made some fans happy for "starting their week off." There have been other positive comments about the change, even though it interferes with the other shows. Even BULL star Michael Weatherly is stoking the fire as he throws a subtle jab at his competition.

- The Hollywood Reporter states "Manifest is by just about every measure the season's breakout new series" and then continuing by saying that "Manifest, The Good Doctor, and Bull pull in a combined 18.68 million viewers per week- 4 million more than any hour of the week" (*Rick Porter- The Hollywood Reporter*)
- Almost two weeks ago MANIFEST was picked up for an extra 3 episodes by NBC, rounding out season one with 16 episodes in total.
- Michael Weatherly tweeted in October "Ah this is the life...Monday nights at 10 after Magnum. No more This is Us. Just Manifest and The Good Doctor. Sweet I feel a nap coming." Many saw this as just a tongue in cheek joke and chimed in on their love for all three shows.
- Social Media Buzz
 - > "Manifest is the best show on TV right now @NBC." (@yaady1203)
 - "I'm beyond exhausted from my day but #ManifestNBC is keeping me on the edge of my seat still." (@hookedonkeller)
 - "If you all haven't checked out the Good Doctor, I highly recommend it. I'm actually frequently surprised by the amount of really great and poignant moments in the show and it's a fantastic view into autism and savant syndrome." (@GIF_Bluehawk)

OTT & Cable

Moving from broadcast to OTT and Cable on the social front, Facebook tends to be the platform of choice for most programs for most streaming and premium cable fans.

- The top program on Facebook remains THE WALKING DEAD with 34.2 million followers.
- #1 on Twitter is GAME OF THRONES with 7.1 million followers.
- In fact, if you combine the followers of the top 10 programs on Twitter, they would make up the 3rd place position on Facebook, behind THE WALKING DEAD and GAME OF THRONES. And that's *INCLUDING* the Twitter followers of TWD and GOT.



Twitter tends to skew younger, so Facebook's broader age distribution probably is a contributing factor to Facebook's social advantage.

- Many streaming and premium cable programs still struggle with Twitter. Even veteran shows like CURB YOUR ENTHUSIASM haven't gone all-in with Twitter yet. CURB has no presence on Twitter (40 followers), but is one of the top steaming/premium shows on Facebook with 1.5M likes.
- Emmy nominees OZARK, BARRY and ORPHAN BLACK have no Twitter profile.
- High profile critical darlings of Amazon Prime, THE MARVELOUS MRS. MAISEL (32.6k) and JACK RYAN (22.3k), each show relatively low Twitter followings, but each have well over 100k "likes" apiece on Facebook.
- Twitter followers for THE CHILLING ADVENTURES OF SABRINA have exploded since the beginning of October. On October 4th, the show had 32,593 followers. A month later, on November 5th, it registered 74,526 – a 129% increase.

In terms of streaming services' social profiles overall, Netflix leads the way with the most Twitter followers (5.4 million), Hulu is second with 579K, Amazon Prime is third with 400K. CBS All-Access remains on the periphery with just over 5,600 followers.

- Recent high-profile streaming premieres include the series premiere of Amazon's HOMECOMING with Julia Roberts and the final season of Netflix's HOUSE OF CARDS, both on November 2nd.
- The launch weekend for HOMECOMING gave a 56% boost to the show's Twitter followers. However, the social number is still quite small 4,725 Twitter followers, which includes the post-launch surge.

In other streaming news, Hulu has added KING OF THE HILL to their exclusive animated post-broadcast content, joining BOB'S BURGERS, FAMILY GUY and AMERICAN DA along with the library content of THE CLEVELAND SHOW and FUTURAMA.

KTG Content Strategy / Katz Media Group Network Primetime & OTT Flash Report #5 12 November 2018

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