

NETWORK PRIMETIME & OTT PROGRAMMING

Flash #2 - 13 October 2017

Two weeks of the 2017-18 primetime season are behind us and the third week is in motion. Two weeks does not a season make as we continue to look at the overall network landscape and what is happening so far. Aside from the traditional ratings, we continue to review our perspective on the performance of the new and returning programs across social media and what impact that may have. As we mentioned last week, once the prime season is in full swing, these Flash reports will venture out to cable, OTT and other dayparts. *Please note that the 2017-18 season began on 9/25/17, a week later than in 2016-17 (9/19/16).*

This Week 2 FLASH includes:

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WEEKLY HEADLINES

- *THE GOOD DOCTOR has so far proven itself to be a chart topper and is on its way to be the first freshman success story.*
- *Primetime NFL FOOTBALL, no matter where it airs (broadcast or cable), continues to grab the most viewers.*
- *CBS and NBC are still the overall winners in week two of the new season with ABC and FOX gaining ground.*
- *Some correlations are emerging between TV ratings and online engagement. Examples this week can be found with THE GOOD DOCTOR, THE GIFTED, WISDOM OF THE CROWD and THE BRAVE. These series have registered significant variations in how they are engaging audiences on social media versus their NTI ratings.*

CHART TOPPERS: WEEKLY PRIMETIME WRAP-UP

- #1 Network in Primetime = CBS in HH's, NBC across key adults 18-49 and 25-54 (NC)
- #1 Network from 10:30-11PM = CBS in HH's, NBC in key adults (NC)
- #1 Network Regular Series (non-sports) = NCIS in HH's, BIG BANG & THIS IS US key adults (BANG-wk. 1)
- #1 Network Freshman Series = THE GOOD DOCTOR (YOUNG SHELDON in week 1)
- #1 Network Primetime Sports Series = NBC SUNDAY NIGHT FOOTBALL (NC)
- #1 Cable Sports Network = ESPN (NC)
- #1 Cable Sports Program = NFL Regular season game (NC)
- #1 Ent Cable Network = TBS (USA HH's and tied with TBS key adults in week 1)
- #1 Ent Cable Program = HALLMARK MOVIE in HH's, AMERICAN HORROR STORY key adults (NC), FEAR OF THE WALKING DEAD tied A25-54
- #1 News Cable Network = FNC HH's & A25-54, tied with CNN A18-49 (FNC week 1 across the board)
- #1 News Cable Program = HANNITY & TUCKER CARLSON (HANNITY HH's, R. MADDOW key adults-wk. 1)

BY THE NUMBERS

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

Overall Primetime Network Performance

- CBS finished the second week of the 2017-18 season #1 again in HH's (5.0/9 L+SD NTI) while NBC placed 1st across the key demos (1.9/7 A18-49, 2.3/7 A25-54), both nets off from week one.
- NBC achieved #2 status in HH's (4.4/8) with CBS 2nd in A25-54 for the second week and CBS & ABC tied in A18-49.
- ABC took 3rd in HH's and A25-54, followed by FOX and the CW.
- In week two, CBS and FOX turned in the most consistent YOY performance while ABC and NBC posted the higher percent declines.
- FOX was the only network to exhibit any growth from week one to week two in overall primetime. This could be due, in part, to the LUCIFER season premiere and THE GIFTED debut on Monday, but more likely, to the NFL overrun and THE OT on Sunday night. The football programming early Sunday evening also impacted the performance of the rest of the line-up, boosting the 8-10PM performances.

NTI PRIMETIME AVERAGES

2017-18: 10/02/2017 - 10/08/2017

	HH Rtg L+SD	HH Shr L+SD	A18-34 Rtg L+SD	A18-34 Shr L+SD	A18-49 Rtg L+SD	A18-49 Shr L+SD	A25-54 Rtg L+SD	A25-54 Shr L+SD	P2+ 000's L+SD	P2+ Median Age
ABC	3.4	6	0.9	4	1.3	5	1.6	5	5410	57
CBS	5.0	9	0.8	4	1.3	5	1.9	6	8007	61
NBC	4.4	8	1.3	7	1.9	7	2.3	7	7200	56
FOX	2.5	5	0.8	4	1.2	5	1.5	5	4006	52
CW	0.6	1	0.1	1	0.2	1	0.3	1	884	55

2016-17: 09/26/2016 - 10/02/2016

	HH Rtg L+SD	HH Shr L+SD	A18-34 Rtg L+SD	A18-34 Shr L+SD	A18-49 Rtg L+SD	A18-49 Shr L+SD	A25-54 Rtg L+SD	A25-54 Shr L+SD	P2+ 000's L+SD	P2+ Median Age
ABC	4.2	7	1.3	6	1.7	6	2.1	6	6708	56
CBS	5.5	10	0.9	4	1.5	5	2.1	6	8680	61
NBC	5.1	9	1.8	8	2.5	9	3.0	9	8425	53
FOX	2.7	5	1.0	5	1.4	5	1.7	5	4333	50
CW	0.7	1	0.2	1	0.3	1	0.3	1	1057	54

Source: NTI NNTV, Live+7 and L+SD, as dated.

*Mon-Sat 8-11PM & Sun 7-11PM averages (ABC, CBS, NBC)/Mon-Sat 8-10PM & Sun 7-10PM (FOX)/Mon-Fri 8-10PM (

% Diff 2017-18 vs 2016-17 -- Primetime - Week 2

	HH Rtg L+SD	HH Shr L+SD	A18-34 Rtg L+SD	A18-34 Shr L+SD	A18-49 Rtg L+SD	A18-49 Shr L+SD	A25-54 Rtg L+SD	A25-54 Shr L+SD	P2+ 000s L+SD
ABC	-20%	-16%	-31%	-20%	-25%	-17%	-22%	-16%	-19%
CBS	-8%	-5%	-8%	6%	-12%	-3%	-13%	-6%	-8%
NBC	-14%	-10%	-30%	-19%	-24%	-17%	-23%	-17%	-15%
FOX	-7%	-3%	-20%	-7%	-15%	-6%	-11%	-4%	-8%
CW	-16%	-13%	-34%	-23%	-23%	-15%	-15%	-9%	-16%

10:30-11PM – Lead-in to the Local News

- Matching primetime's overall findings, CBS turned in the highest rated performance in HH's (4.5/9) for the half hour leading up to the local news while NBC achieved a 1st place finish in A18-49 (1.5/6) and A25-54 (1.9/6).
- CBS was 2nd from 10:30-11PM among A25-54 while CBS & ABC tied in A18-49.
- Versus the second week of the fall 2016 season, CBS was the only network to experience, albeit minimal, share gains across the board.
- From week one to week two of the current season, NBC posted slight declines while ABC and CBS were relatively stable.

NTI 10:30-11PM AVERAGES

2017-18: 10/02/2017 - 10/08/2017

	HH Rtg L+SD	HH Shr L+SD	A18-34 Rtg L+SD	A18-34 Shr L+SD	A18-49 Rtg L+SD	A18-49 Shr L+SD	A25-54 Rtg L+SD	A25-54 Shr L+SD	P2+ 000's L+SD	P2+ Median Age
ABC	3.3	7	0.8	4	1.2	5	1.5	5	5242	58
CBS	4.5	9	0.8	4	1.2	5	1.7	6	7080	61
NBC	3.8	8	1.0	5	1.5	6	1.9	6	6037	57

2016-17: 09/26/2016 - 10/02/2016

	HH Rtg L+SD	HH Shr L+SD	A18-34 Rtg L+SD	A18-34 Shr L+SD	A18-49 Rtg L+SD	A18-49 Shr L+SD	A25-54 Rtg L+SD	A25-54 Shr L+SD	P2+ 000's L+SD	P2+ Median Age
ABC	3.7	7	1.2	5	1.6	6	1.9	6	5777	55
CBS	4.6	9	0.7	3	1.2	4	1.7	5	7145	62
NBC	4.8	9	1.7	8	2.2	8	2.7	8	7694	54

Source: NTI NNTV, L+SD, as dated.

*Mon-Sat 8-11PM & Sun 7-11PM averages (ABC, CBS, NBC)/Mon-Sat 8-10PM & Sun 7-10PM (FOX)/Mon-Fri 8-10PM (

% Diff 2017-18 vs 2016-17 -- 10:30-11PM

	HH Rtg L+SD	HH Shr L+SD	A18-34 Rtg L+SD	A18-34 Shr L+SD	A18-49 Rtg L+SD	A18-49 Shr L+SD	A25-54 Rtg L+SD	A25-54 Shr L+SD	P2+ 000's L+SD
ABC	-9%	-5%	-31%	-19%	-24%	-15%	-21%	-14%	-9%
CBS	-3%	2%	12%	32%	-2%	10%	-2%	7%	-1%
NBC	-20%	-16%	-41%	-31%	-34%	-26%	-32%	-26%	-22%

TOP IT OFF: TOP 10, TOP 15, TOP 25 NEW PROGRAMS

- With YOUNG SHELDON not airing again until 11/2/17, ABC's THE GOOD DOCTOR became the only freshman series to achieve a top 10 ranking in HH's (#7) and key adult demos (#9T A18-49, #9 A25-54). THE GOOD DOC was also one of very few shows to achieve any increases versus its premiere episode.
- As the tentpole for NBC's Thursday night line-up, WILL & GRACE earned top honors in A25-54 only (#10) this week, down to #12 in A18-49 and tied for 23rd in HH's.
- On CBS Monday night, 9JKL placed in the top 20 in A18-49 (#16T) and A25-54 (#14T) with its first episode thanks to the boost it got from its BIG BANG lead-in while ME, MYSELF & I fell out of the top 25 in HH's and key adults in its move from 8:30PM to 9:30PM leading out of a weaker and declining KEVIN CAN WAIT.

- SEAL TEAM hit the top 25 in HH's (#16T) and just made it in A25-54 (#24T) this week. The military procedural, which focuses on the team's personal lives, was just given a full season order by CBS.
- WISDOM OF THE CROWD ranked among the top 25 in HH's only (#22) again this week, barely reaching the top 50 among key adults, slightly off from its week one performance.
- GHOSTED moved up to tie for 15th in A18-34 and jumped up the ranker to tie for 22nd in A18-49.
- In its first outing, the debut of FOX's THE GIFTED not only placed in the top 20 in A18-34 (#19T) and A18-49 (#20T), but made its mark among the top 25 in A25-54 (#24T), a feat unusual for a FOX series.
- If you take sports out of the equation, since they take up the top spots, some of these programs would move up and others would slip into the top 25, but since the NFL and COLLEGE FOOTBALL are technically weekly, regular series as well, we keep them in the mix.
- Look for more on the social media story for THE GOOD DOCTOR, WISDOM OF THE CROWD and THE GIFTED in the "What's the Buzz" section below.

TOP 25 PROGRAMS: NETWORK TALLY

Number of Programs per Demo

- CBS continued to boast the most number of programs in the top 25 HH's while ABC overtook both CBS and NBC among key adults with its returning Tuesday comedies, SCANDAL and SAT NIGHT FOOTBALL.
- FOX also saw its tally increase across the board from week one, but especially in the A18-49 demo with the additions of THE GIFTED, STAR, FAMILY GUY and GHOSTED.

Week of 10/02/17	HH's	A18-34	A18-49	A25-54
ABC	3	8	11	9
CBS	15	3	5	8
NBC	6	7	7	6
FOX	1	7	7	4

SCORECARD: WHO TOOK THE NIGHT?

- Overall, CBS carried much of the week in HH's (Tuesday-Friday) and was #1 across the board Thursday (FOOTBALL) and Friday (HAWAII 5-0, BLUE BLOODS and MACGYVER), but yielded to ABC in HH's and NBC in key adults on Monday in week two of the new season.
- NBC topped its competitors on Sunday with SUNDAY NIGHT FOOTBALL and was #1 on Monday (THE VOICE) and Tuesday (THIS IS US and THE VOICE) among key adults.
- FOX finished 1st on Wednesday among key adults for the second week in a row with its musical soap EMPIRE / STAR block.
- ABC finished 1st on Monday in HH's (DANCING WITH THE STARS 25 and THE GOOD DOCTOR) and won the race on Saturday with SATURDAY NIGHT (College) FOOTBALL.

NIGHT-BY-NIGHT SCORECARD WINS

	MON	TUE	WED	THU	FRI	SAT	SUN
HH's	ABC	CBS	CBS	CBS	CBS	ABC	NBC
A18-49	NBC	NBC	FOX	CBS	CBS	ABC	NBC
A25-54	NBC	NBC	FOX	CBS	CBS	ABC	NBC

Source: Nielsen's NNTV, L+SD data, as dated

ON THE CABLE FRONT

- Thanks to NFL FOOTBALL and this week, an MLB WILD CARD GAME, ESPN was the top overall advertiser supported cable network and top Sports Network in HH's and key adults. Monday's regular season NFL game at 8:15PM delivered a 7.3/13 (versus last week's 8.2/15) in HH's, a 4.3/16 (versus a 5.0/19) in A18-49 and a 4.7/15 (versus a 5.7/18) in A25-54, on par, and even above, most broadcast network performances. The WILD CARD GAME on Tuesday at 8PM posted a significantly lower performance (4.2/8 HH, 2.2/9 A18-49, 2.3/8 A25-54), but was #2 for the week.
- Breaking it down more specifically, the top Entertainment Cable network this week was TBS in HH's with a 1.4/3 NTI, a 0.7/3 in A18-49 and a 0.8/3 in A25-54. TBS also aired a MLB WILD CARD GAME in prime. The top News Cable network was FNC in HH's (1.6/3) and A25-54 (0.5/2), tied with CNN in A18-49 with a 0.3/1.
- HALLMARK's ORIGINAL fall-themed SATURDAY NIGHT MOVIE was #1 on the entertainment front again this week in HH's (1.9/4) while FX's AMERICAN HORROR STORY: CULT finished 1st in A18-49 (1.1/4) and tied with FEAR OF THE WALKING DEAD in A25-54 (1.0/3).
- HANNITY and TUCKER CARLSON were #1 among the news networks in HH's (2.1/4) and A18-49 (0.4/2).
- These cable numbers indicate that while these shows were at the top of their respective categories, if you compare them to a good portion of network fare, their ratings are very low. There is also only a small percent of the cable networks or programs that can compete on the level the networks are delivering.

WHAT'S THE BUZZ?

As we continue to monitor social media, we're struck by the correlations between TV ratings and online engagement. As mentioned earlier, THE GOOD DOCTOR and THE GIFTED have landed in the HH NTI Top 25 and are performing very well in key adult demos over the first two weeks of the season while WISDOM OF THE CROWD only made the top 25 in HH's. Our tracking, however, shows significant variations in how these shows are engaging audiences on social media, as illustrated in the table below.

Social Media Audiences for Select New Series of the
2017 Network Primetime Season

THE GOOD DOCTOR (ABC)	Start of Premiere Week 25 September	Morning After Premiere 26 September	After Two Episodes 11 October	Net Increase
Facebook Likes	425,646	461,620	617,745	192,099
Twitter Followers	7,189	14,274	27,227	20,038
THE BRAVE (NBC)	Start of Premiere Week 25 September	Morning After Premiere 26 September	After Two Episodes 11 October	Net Increase
Facebook Likes	25,670	29,443	37,491	11,821
Twitter Followers	1,251	1,715	2,964	1,713
WISDOM OF THE CROWD (CBS)	Start of Premiere Week 25 September	Morning After Premiere 2 October	After Two Episodes 11 October	Net Increase
Facebook Likes	17,399	22,672	27,226	9,827
Twitter Followers	979	1,692	2,095	1,116
THE GIFTED (FOX)	Start of Premiere Week 25 September	Morning After Premiere 3 October	After Two Episodes 11 October	Net Increase
Facebook Likes	100,983	131,130	165,861	64,878
Twitter Followers	11,841	17,492	21,832	9,991

Source: Facebook and Twitter, October 2017

- It's interesting to note that THE GOOD DOCTOR essentially doubled its Twitter Followers the morning after the premiere aired and then almost doubled that number again after the first three episodes aired. It's far and away the biggest winner among new series in engaging viewers on social media, which is likely adding momentum to the increased publicity efforts at ABC and coverage across entertainment magazines, programs, and morning shows.

- While not as dramatic, THE GIFTED has also posted significant gains on both Facebook and Twitter. The pre-premiere numbers were likely fueled by FOX's marketing efforts, especially at Comic-Con this past summer, where we first observed significant online chatter and excitement for this new series.
- Ironically, WISDOM OF THE CROWD, which focuses on social media-driven crime solving, has posted only modest gains on Facebook and Twitter. When one searches Apple's App Store for Sophe, the name of the app featured in the show, one gets a series of options unrelated to the show; similarly, Sophe.com takes visitors to a German-hosted homepage with no content. CBS might be able to take a page out of NBC's playbook with what it cleverly did with JustJack.com, Jack's oft-repeated URL during the original run of WILL & GRACE. An easy way for CBS to digitally engage viewers and increase numbers might be to publish an app that automatically takes viewers to the show's homepage or opens exclusive online content related to each week's case or the longer "find Sophe" narrative arc.
- One of the challenges with THE BRAVE, which is likely reflected in both on-air and online numbers, is that viewers seem frustrated and confused about where this new series is going. Our team noted chatter about the disconnect between a cliffhanger at the end of the pilot and the start of the second episode, as well as in the very different direction the show went in its third airing earlier this week.
- Finally, although FOX has partnered with Twitter to produce an EMPIRE pre-show that features cast members, guest stars, journalists, and social media influencers talking and Tweeting about the series, we've observed only a modest increase in Twitter Followers from 1,477,531 at the start of premiere week to 1,480,788 on the morning after the series premiered to 1,482,262 this past Wednesday, 11 October. That's a net increase of only 4,731 Followers. Our team observes that online discussions reveal audience confusion and frustration with the new direction the show has taken following the memory loss and personality change of a key character.

KTG Content Strategy / Katz Media Group
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