



CONTENT STRATEGY FLASH REPORT

NETWORK PRIMETIME & OTT PROGRAMMING

Flash #5 - 15 November 2017

The 2017-18 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 the “bubble” has burst on their future. 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.

Over the next week, we will release an addendum to this Flash Report comparing the results of traditional ratings with how these programs have fared from a social media perspective, using OUR MEDIA panel and an “Intent to Watch” versus “What was Actually Watched” study.

This week’s **FLASH #5** includes:

- **WHAT’S THE SCOOP?** -- information regarding the network’s schedules Pages 1-2
- **NOW OR LATER** – time-shifted viewing results Pages 2-6
- **WHAT’S THE BUZZ** -- review of social media and how it impacts the new TV season Pages 6-7

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.*
- *While **DESIGNATED SURVIVOR** garnered the highest percent changes and placed among the top 10 with its actual share growth, it was **THE GOOD DOCTOR** and **THIS IS US** which achieved the most substantial share gains between L+SD and L+7 data.*
- *One of the biggest and “buzziest” premieres of the new season came via Netflix on Friday, October 27th. All nine episodes of **STRANGER THINGS 2** dropped overnight and drew large audiences through OTT and social media platforms.*

WHAT’S THE SCOOP?

What’s the freshman news...re-scheduled, renewed, additional episodes...

- The first casualty of the season, **TEN DAYS IN THE VALLEY**, was pulled from its Sunday, 10PM time slot and relegated to finish out its 10-episode run on Saturday nights.
- With **THURSDAY NIGHT FOOTBALL** moving from CBS to NBC, CBS’s Monday and Thursday primetime schedules have been tweaked.
 - **BIG BANG** and **YOUNG SHELDON** paired up on Thursday leaving Monday night in a tight spot.
 - **YOUNG SHELDON**’s Thursday performance dropped considerably from its Monday, 8:30PM debut, but remained relatively on target with its current week-to-week showing across key adults, posting a 2-share point drop-off in W25-54 in L+SD data up against a strong **GREY’S ANATOMY**. **YOUNG SHELDON** was granted a full season order.
 - **KEVIN CAN WAIT** moved up to 8PM, blowing 9JKL’s ace-in-the-hole 8:30PM lead out spot.
 - With 9JKL pushed back to 9:30PM, **ME, MYSELF & I** was taken off the schedule, to return at an undetermined date, day and time.

- The #1 freshman series, THE GOOD DOCTOR, turned in a consistent week-to-week performance and has been given a full 18-episode season order.
- It was as if WILL & GRACE (and KAREN & JACK) was never off-the-air.
 - Not only did the sitcom deliver a top 10 performance across the key demos, but the ensemble's chemistry knows no bounds. Additional episodes were ordered for the current season and the comedy was renewed for season two before season one even began.
- FOX's THE ORVILLE reduced its original 13-episode run down to 12, but has been renewed for a second season where the cut episode will most likely air.
- SEAL TEAM fought hard and grabbed a full season order after its second mission.
- ABC blessed KEVIN (PROBABLY) SAVES THE WORLD with three more episodes for the season and a chance to try and do some good while THE MAYOR was voted in with three additional scripts.
- The CW's DYNASTY re-boot received a full season pick-up, adding nine episodes for a total of 22 while VALOR was not given a back order beyond its initial 13-episode run.

NOW OR LATER ... Time-Shifted Viewing

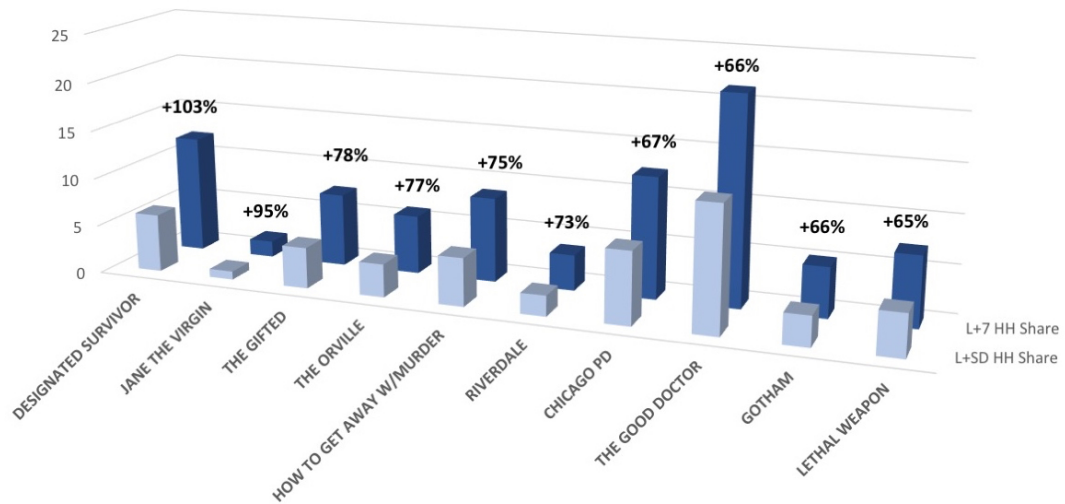
In today's hectic world, between broadcast television, advertiser supported and pay cable and OTT, there are just too many series to choose from and too many "good" programs airing at the same time. These are a couple of the reasons viewers elect to watch "their shows" on their own time table either 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

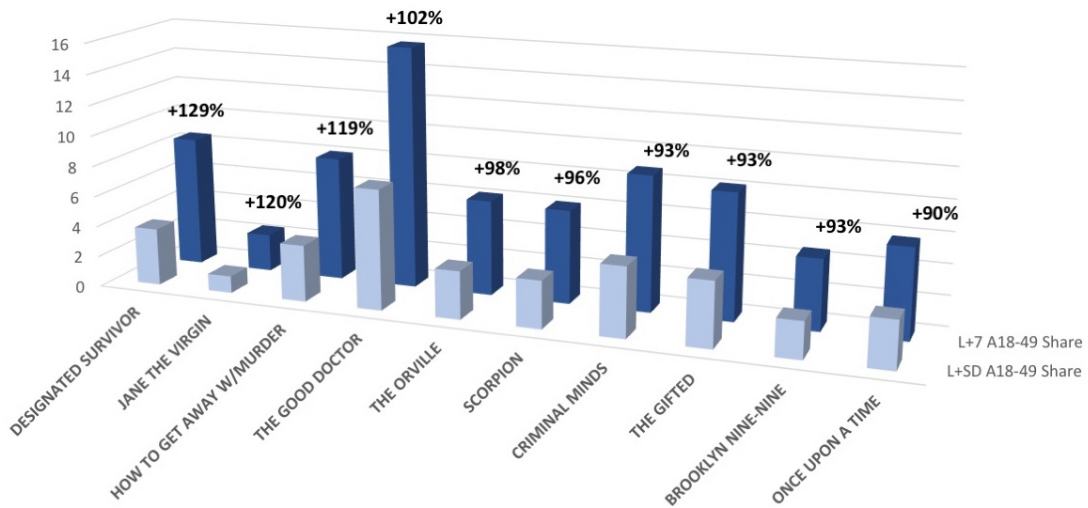
- DESIGNATED SURVIVOR continued to top the charts, up 103% in HH's (from a 6 to a 12 share), up 129% in A18-49 (from a 4 to a 9 share) and up 124% in A25-54 (from a 4 to a 9 share) from its L+SD to its L+7 delivery.
- JANE THE VIRGIN ranked 2nd in HH's (+95%), A18-49 (+120%) and A25-54 (+114%), all increasing from a 1 to a 2 share).
- Other programs in the top ten of percent gains ranging from +65% to +79% in HH's, +93% to +119% in A18-49 and +83% to +108% in A25-54 and across key adults from L+SD to L+7 included THE GIFTED, THE ORVILLE, HOW TO GET AWAY WITH MURDER and THE GOOD DOCTOR.
- RIVERDALE was a top 10'er in HH's (+73%, from a 2 to a 4 share) and A25-54 (+83%, from a 2 to a 4 share) as was CHICAGO PD (+67%, 7 to a 12 share, +86%, from a 5 to a 9 share, respectively).
- CRIMINAL MINDS boasted a high percentage growth in A18-49 (+84%, from a 5 to a 9 share) and A25-54 (+84%, from a 5 to a 10 share).

Time Shifted Viewing
Top 10 HH Shows
L+SD vs L+7 Percentage Gains



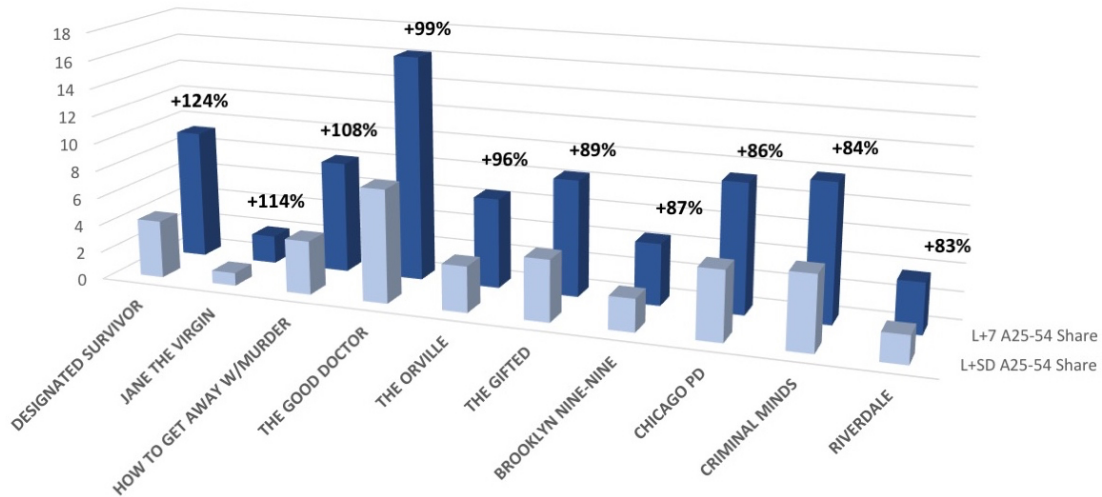
Source: Nielsen NNTV, L+SD vs L+7 NTI Data, 9/25/17 - 10/22/17.

Time Shifted Viewing
Top 10 A18-49 Shows
L+SD vs L+7 Percentage Gains



Source: Nielsen NNTV, L+SD vs L+7 NTI Data, 9/25/17 - 10/22/17.

**Time Shifted Viewing
Top 10 A25-54 Shows
L+SD vs L+7 Percentage Gains**

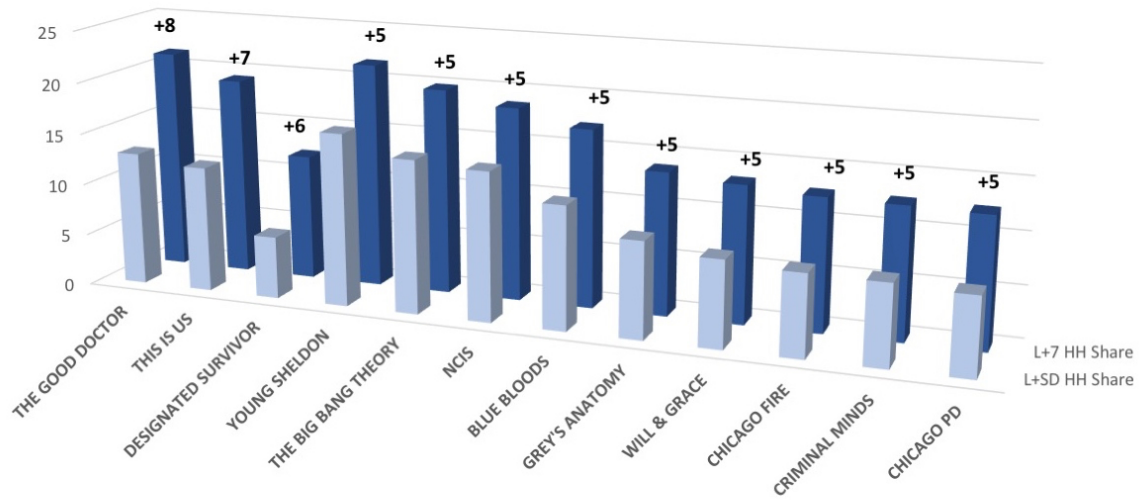


Source: Nielsen NNTV, L+SD vs L+7 NTI Data, 9/25/17 - 10/22/17.

By Share

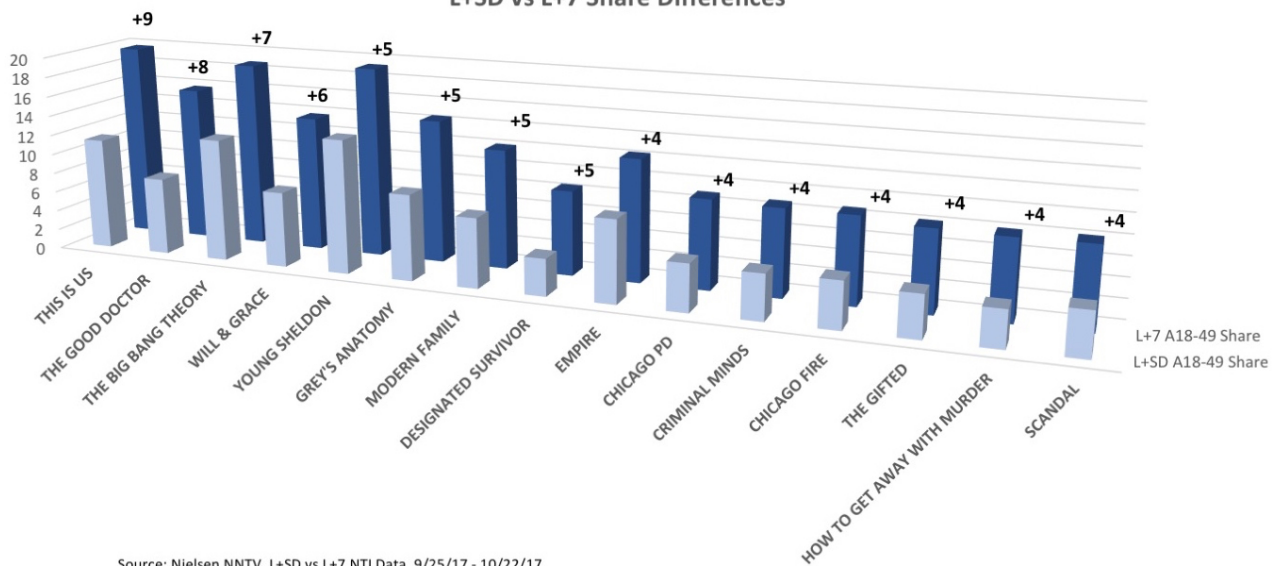
- The examination of share surges for the primetime series (L+SD vs L+7) conveyed a slightly different story than the percentages. Though there were some commonalities.
- While DESIGNATED SURVIVOR garnered the highest percent changes and placed among the top 10 with its actual share growth, it was THE GOOD DOCTOR and THIS IS US which achieved the most substantial share gains between L+SD and L+7 data.
 - THE GOOD DOCTOR boasted increases of 8 share points across the board, from a 13 to a 21 share in HH's (+66%) and from an 8 to a 16 share in A18-49 and A25-54.
 - THIS IS US boosted its L+SD versus L+7 performance from a 7 share to a 19 in HH's (+5 shares), from an 11 to a 20 (+9 shares) in A18-49 and from a 12 to a 20 (+8 shares) in A25-54.
- WILL & GRACE performed admirably from its L+SD to L+7 viewing, turning in a 5-share point gain in HH's (from an 8 to a 13), a 6-share increase (from an 8 to a 14) in A18-49 and +7 shares (from an 8 to a 15) in A25-54.
- Other series to grow its shares by at least 5 points and above in HH's as well as the key demos included YOUNG SHELDON, THE BIG BANG THEORY and GREY'S ANATOMY.

Time Shifted Viewing Top 10 HH Shows L+SD vs L+7 Share Differences



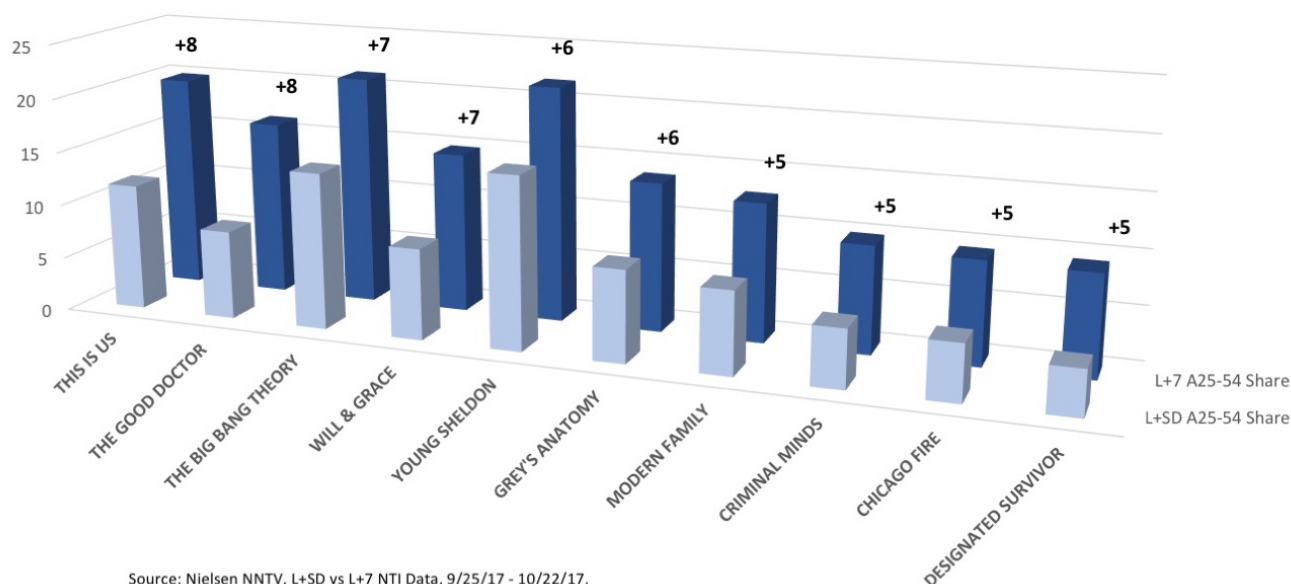
Source: Nielsen NNTV, L+SD vs L+7 NTI Data, 9/25/17 - 10/22/17.

Time Shifted Viewing Top 10 A18-49 Shows L+SD vs L+7 Share Differences



Source: Nielsen NNTV, L+SD vs L+7 NTI Data, 9/25/17 - 10/22/17.

Time Shifted Viewing Top 10 A25-54 Shows L+SD vs L+7 Share Differences



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 running the gamut between 22% to 103% increases in HH's, 28% to 129% in A18-49 and 29% to 124% in A25-54.
- Sitcoms were next in line averaging 16% to 64% increases in HH's, 19% to 93% gains in A18-49 and a 19% to 87% up-tick in A25-54.
- Sporting events were more often watched live and don't show much, if any, increase from L+SD to L+7 data.
- While competition shows post somewhat of an increase (+5% to +40% in HH's, +9% to +60% in A18-49, +8% to +39% in A25-54), it doesn'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.*

WHAT'S THE BUZZ?

A final note on an update of a table we shared in mid-October, as has been discussed above and in previous Flash Reports. THE GOOD DOCTOR and THE GIFTED have performed very well in both L+SD and L+7 NTI's so it's not surprising to see their Facebook and Twitter audiences increase significantly. In the case of THE GOOD DOCTOR, the 367% increase in engaged Twitter followers is stunning.

At the same time, both THE BRAVE and WISDOM OF THE CROWD, which have tracked against a lower rating and share performance, continue to grow their social media communities. While their actual numbers may be smaller than the season's new "hits", their percentage increases over the first four weeks of the season are solid, suggesting that regardless of overall numbers, viewers who become fans engage with these programs at similar rates.

**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 Four Weeks 25 October	Net and Percentage Increase
Facebook Likes	425,646	461,620	676,672	251,026 / 59%
Twitter Followers	7,189	14,274	33,553	26,364 / 367%
THE BRAVE (NBC)	Start of Premiere Week 25 September	Morning After Premiere 26 September	After Four Weeks 25 October	Net Increase
Facebook Likes	25,670	29,443	43,866	18,196 / 71%
Twitter Followers	1,251	1,715	3,954	2,703 / 216%
WISDOM OF THE CROWD (CBS)	Start of Premiere Week 25 September	Morning After Premiere 2 October	After Four Weeks 25 October	Net Increase
Facebook Likes	17,399	22,672	28,765	11,366 / 65%
Twitter Followers	979	1,692	2,541	1,562 / 159%
THE GIFTED (FOX)	Start of Premiere Week 25 September	Morning After Premiere 3 October	After Four Weeks 25 October	Net Increase
Facebook Likes	100,983	131,130	191,302	90,319 / 86%
Twitter Followers	11,841	17,492	26,158	14,317 / 121%

Source: Facebook and Twitter, September and October 2017

OTT

One of the biggest and “buzziest” premieres of the new season came via Netflix on Friday, October 27th. All nine episodes of STRANGER THINGS 2 dropped overnight and drew large audiences through OTT and social media platforms.

- Not only did STRANGER THINGS break a Twitter record for the most tweets in the first three days -- 3.7 million, according to data the company provided to Variety -- but, according to our social barometer tracking, the series attracted another 100,000 Twitter followers in the same period, which pushed its total to almost 1 million, and pushed it close to 5 million “Likes” on Facebook.
- These numbers are underscored by ratings data from Nielsen and Parrot Analytics that reveal more than 15 million people watched at least one episode in the first three days of release. Equally astounding is that close to 5 million viewers had watched all episodes within 72 hours.
- While Nielsen and Parrot Analytics have developed different methodologies for tracking viewership of OTT programs, Netflix, which does not release streaming data, has suggested the numbers are “not even close” to actual viewership.

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