

NETWORK PRIMETIME & OTT PROGRAMMING

Flash #6 - 2 May 2018

With the May sweep, the 2018 Fall Upfronts and the end of the 2017-18 season upon us, here is a look at where the new Winter/Spring series fit into the primetime landscape. This review is based upon program and time period performances between 1/1/18-4/8/18 (please see attached excel file for all the detailed ratings). *Since this overview follows the Winter season into the beginning of Spring, keep in mind that the Winter Olympics is included in the overall primetime time period averages.*

FLASH #6 includes:

- **BY THE NUMBERS** – overall primetime performance for the broadcast networks Pages 1-2
- **SPOTLIGHT SERIES** – review of top two new series ROSEANNE & AMERICAN IDOL Pages 2-3
- **QUICK STATS** – performance bullets on other top 50 freshman series Page 4
- **ISN'T IT SPECIAL** – quick look at the specials that aired in 1st quarter 2018 Page 5
- **WHAT'S THE BUZZ** -- review of digital & social media, how it impacts the TV landscape Pages 5-7

TAKE-AWAY HEADLINES

- *ROSEANNE returned to ABC primetime with a phenomenal performance, supporting the theory that "lightening in a bottle" can strike twice under the right circumstances.*
- *ABC made the most changes to its primetime schedule, debuting more freshman series than the network did in the Fall.*
- *AMERICAN IDOL is back in primetime and airing on ABC after the network picked it up and changed it up. IDOL is delivering similar share levels as it did its last season on FOX and comparable key adult shares to other competition shows like DANCING WITH THE STARS and THE BACHELOR.*
- *The Video Power Index (VPI) from Shareable provides an interesting model to analyze audience engagement across social media platforms, providing insights beyond total "likes" and "follows" by including a variety of actions weighted by audience scale.*
- *Enabling either all-at-once binge watching or managing through weekly views, emerging data from OTT show release strategies and how they vary across platforms may help us better understand audience preferences and behaviors.*

BY THE NUMBERS

Overall Primetime

- NBC led the other networks as the #1 performer in P2+ (9.8 million viewers, L+7 data), HH's (5.7/10), A18-34 (1.5/8), A18-49 (2.4/9) and A25-54 (3.0/10). *Keep in mind that these time period averages include NBC's big events like the SUPER BOWL and the WINTER OLYMPICS.* Versus the same time frame year ago, CBS was the top network in 2017 across the board, tied with ABC and FOX in A18-34.
- Year-to-year, ABC and the CW remained the most consistent.

New Series Scorecard

- ABC posted the most additions to its Winter/Spring line-up so far. Of the 12 freshmen series still on the air in first quarter, nine of them began between January and the first week in April. Of NBC's eight, five just recently premiered with FOX debuting four since January and CBS and the CW two series each.
- Of these new programs, the ROSEANNE return boasted a meteoric rise to the top of the rankings with a phenomenal performance across the board, leaving its competition in the dust. In HH's, CBS' INSTINCT (from James Patterson and starring Alan Cumming) ranked 2nd of the first quarter debuting series with a 5.6/10 (L+SD) and a 7.1/12 (L+7). ROSEANNE out delivered its closest competitor by 80% (+8 shares)

and 125% (+15 shares), respectively. Across key adults, INSTINCT fell well below all the other new shows with FOX's 9-1-1 taking a 2nd place finish behind ROSEANNE by a very wide margin in L+7 data while AMERICAN IDOL-SUN was next in line after ROSEANNE in L+SD data.

- In L+7, the Ellen DeGeneres produced SPLITTING UP TOGETHER landed behind 9-1-1 across the key demos, followed by IDOL-SUN and MON, STATION 19 and THE RESIDENT.
- If you add all the series that premiered in the fall and are still airing now into the mix, ROSEANNE would still be #1 in HH's, followed by YOUNG SHELDON, THE GOOD DOCTOR, SWAT and SEAL TEAM. Among key adults, add in ELLEN'S GAME OF GAMES, GHOSTED and WILL & GRACE.
- ROSEANNE even topped THE BIG BANG THEORY, THIS IS US and NCIS in HH's and GREY'S ANATOMY and THE VOICE in key adults. (See full primetime ranking on the attached excel file.)
- On the cable front, aside from sports on ESPN and Turner, AMC's THE WALKING DEAD is the top series achieving network-sized ratings with substantial increases between L+SD and L+7 data – 3.8/7 to a 6.1/11 in HH's, 1.9/10 to a 3.2/16 in A18-34, 3.0/11 to a 4.7/17 in A18-49 and 3.5/10 to a 5.6/16 in A25-54.

SPOTLIGHT SERIES



ROSEANNE RETURNS TO RULE THE ROOST

ROSEANNE returned to primetime in all its glory after ending its initial run on the network from 1988 to 1997. Though ROSEANNE was no longer on the ABC schedule after '97, it has remained on the airwaves in syndication and cable throughout the years. ROSEANNE is proof that if the right show is brought to broadcast television, the audience will come and they will come in droves. Sometimes "lightening in a bottle" can strike twice, especially if you have the same actors, characters, show opening and relatable and topical issues that made it a success the first time around. In ROSEANNE's case, it was also the right time, the right place, the right ensemble and the right writing team to tie it all together. Roseanne and Sarah Gilbert both tell the story that the re-do got its start when Sarah Gilbert and John Goodman did a sketch on THE TALK. Gilbert called Roseanne "because it got like 10 million hits." "First it was a reunion show, and then, 'Do you want to do three?' and then 'Do you want to do nine?'" According to other sources, the political climate also had a hand in its return similar to the way WILL & GRACE made their comeback with a short pop culture campaign which got a ridiculous amount of U-Tube hits.

- ROSEANNE premiered to remarkable ratings, boasting a 10.7/19 HH L+SD performance, a 3.1/17 in A18-34, a 5.2/21 in A18-49 and a 6.9/22 in A25-54. Even more significant were the L+7 numbers for episode one: 16.0/29 HH, 4.8/26 A18-34, 8.1/33 A18-49 and 10.7/35 A25-54.
- In the weeks that followed, ROSEANNE's ratings experienced declines, but still turned in a more than competitive showing, not unusual for a new show until it settles into its weekly average,
- After two weeks of L+7 data, ROSEANNE is currently the #1 program in overall primetime in P2+, HH's, A18-34, A18-49 and A25-54, L+SD and L+7 data.
- Though ROSEANNE did not garner the highest percentages from L+SD to L+7, the comedy achieved the highest rating and share differences -- +9 shares in HH's and A18-34, +12 shares in A18-49 and A25-54. As we've mentioned in previous flashes, the percentages can be misleading, so to look at the actual difference in rating and share performance is more telling.

- ROSEANNE jumpstarted the Tuesday, 8-8:30PM time period by a very substantial margin, outperforming THE MIDDLE's delivery year ago (Jan-first week in April). ROSEANNE's 9.4/17 HH four week L+SD average was almost triple that of THE MIDDLE's 3.5/6. In the other key demos, ROSEANNE earned a 2.5/14 to THE MIDDLE's 0.8/4 in A18-34, a 4.2/18 to a 1.4/5 and a 5.8/19 to a 1.9/6. The same type of huge discrepancy levels held true with the L+7 data.
- While ROSEANNE had a positive influence on the 8PM anchor position, it only helped increase the entire Tuesday night average (versus same time frame year ago) by a minimal amount – from a 2.9/5 to a 3.4/6 in L+7 HH's, from a 0.7/3 to a 0.9/5 in A18-34, from a 1.3/5 to a 1.4/6 in A18-49 and from a 1.7/5 to a 1.9/6 in A25-54.



AMERICAN IDOL REFRESH

AMERICAN IDOL returned to primetime network television in March landing on ABC after a two-year hiatus from its long FOX run (from 2002-2016). IDOL was a phenom on FOX when it debuted. By 2007 it was delivering 30 shares among key adults. The popular competition series hosted by Ryan Seacrest with Simon Cowell, Randy Jackson and Paula Abdul as judges, turned in a very slow decline over the years, down to high 20 shares then low to mid-20 shares, low 20 shares, mid-teen shares in 2012 to low teen shares and ending its run with single-digit share levels. Trying to re-capture that original success, which gave rise to performers such as Kelly Clarkson, Carrie Underwood, Jordan Sparks, Chris Daughtry, Kellie Pickler, Katharine McPhee, Jennifer Hudson and others, has not been easy, but ABC is making a go of it. Ryan Seacrest reprised his role as host and new judges include Katy Perry, Lionel Richie and Luke Bryan. America still votes in this more “Disney-fied”, more “taste of Americana” version, but for three weeks it will be the first time a competition show is voted on simultaneously across all time zones.

- AMERICAN IDOL debuted on Sunday, 3/11/18 at 8PM with a L+SD 5.9/10 NTI (6.9/12 L+7) in HH's. Among key adults, IDOL earned a 1.6/8 (2.0/10) in A18-34, a 2.3/9 (2.8/10) in A18-49 and a 3.0/9 (3.6/11) in A25-54. It is currently averaging a 4.5/8 L+SD in HH's, a 1.1/6 in A18-34, 1.7/6 in A18-49 and a 2.2/7 in A25-54. Monday's first episode performance was slightly lower than Sunday's debut, but its overall Monday average-to-date is comparable to its Sunday delivery.
- While IDOL (2.0) didn't come out of the box singing at the top of its lungs, it began with a solid, competitive performance to ABC's other Monday competition shows like DANCING WITH THE STARS and THE BACHELOR. Versus last year's DWTS' March and April performance, IDOL fell 4 to 5 shares below in HH's (L+SD/L+7), but was consistent with the key adult demo performance.
- AMERICAN IDOL-SUN is performing well above the March/April 2017 8-10PM time period which was occupied by lesser rated series such as MATCH GAME/TIME AFTER TIME and ONCE UPON A TIME. IDOL jumpstarted the time period by 5 shares in HH's, 4 shares in A18-34 and 18-49 and by 5 shares in A25-54.
- Versus its direct 8-10PM competition, AMERICAN IDOL-SUN was #2 in HH's behind CBS' INSTINCT and NCIS: LA, but scored a 1st place finish among key adults. On Monday, AMERICAN IDOL placed #2 to THE VOICE's #1 in HH's and key adult demos, except in A18-34 where it tied NBC in L+7 data.

QUICK STATS -- OTHER NEW TOP 50 SERIES....

(Ratings/Shares & Ranks based on primetime ranking from 1/1/18-4/8/17, rankings based on L+7)



INSTINCT

- CBS – Sunday 8PM -- #13 tied in HH's 7.1/12 (L+7), 26% increase from L+SD delivery of 5.6/10.
- Top 50 among A25-54, below 50 in the younger 18-34 and 18-49 demos.



9-1-1

- FOX – Wednesday 9PM -- #20 in HH's 6.5/12 (L+7), 71% increase from L+SD delivery of 3.8/7.
- Top 5 among A18-34, top 10 across A18-49 and 25-54.



STATION 19

- ABC – Thursday 9PM -- #31T in HH's 5.5/10 (L+7), 52% increase from L+SD delivery of 3.6/7.
- Top 25 A18-34 and A18-49, #40 in A25-54.
- Another Shanda Rhymes drama, replaced SCANDAL and achieved a similar performance.



SPLITTING UP TOGETHER

- ABC – Tuesday 9:30PM -- #39T in HH's 5.1/9 (L+7), 39% increase from L+SD delivery of 3.7/6.
- Top 10 across all key adult demos.
- From Ellen DeGeneres.



THE RESIDENT

- FOX – Monday 9PM (premiered on a Sunday following the NFC game) -- #44 in HH's 4.9/9 (L+7), 62% to 63% increase from L+SD delivery of 3.0/5.
- Top 25 in A18-34, top 30 in A18-49 and top 35 in A25-54.



RISE

- NBC – Tuesday 9PM -- #49 in HH's 4.5/8 (L+7), 40% increase from L+SD delivery of 3.2/6.
- Top 50 in A18-34 and A18-49, top 60 in A25-54.
- Performance considerably below its predecessor THIS IS US across the board.



GOOD GIRLS

- NBC – Monday 10PM -- #56T in HH's 4.1/8 (L+7), 39% increase from L+SD delivery of 2.9/6.
- Top 50 across key adults.
- Should do better with THE VOICE as its lead-in, but does sometimes win the time period in key adults.

ISN'T IT SPECIAL

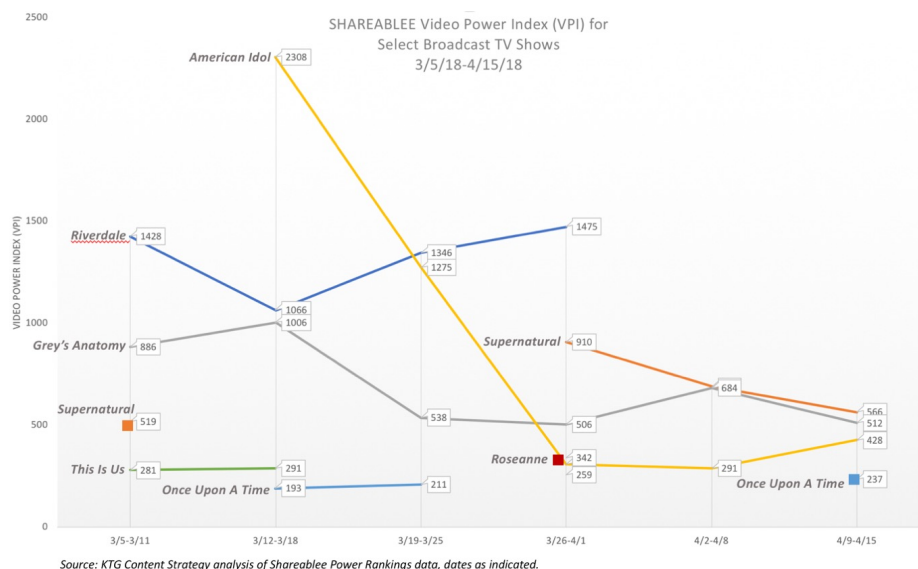


If we disregard sports and only look at the specials that have aired since January 2018, THE OSCARS, THE GOLDEN GLOBES, the 60TH ANNUAL GRAMMY AWARDS, LIVE FROM THE RED CARPET 2 & 3 and JESUS CHRIST SUPERSTAR Live were the top overall performers in P2+ and HH's. Among the key demos, THE BACHELOR AFTER THE FINAL ROSE gets added to the mix and in A18-34 only THE 2018 GRAMMY AWARDS RED CARPET turns in a top showing. (See the attached excel file for all the details.)

WHAT'S THE BUZZ?

The six weeks between early March and mid-April provide an interesting opportunity to look at audience engagement through social media activity for long-running shows, premieres, and season finales. Building on the work we've done throughout the current season to chart basic interactions and audience size on Facebook, Twitter, and YouTube, we recently looked at Shareablee's video power index (VPI) rankings for broadcast and streaming shows.

- Shareablee's VPI is an interesting assessment because it represents: a combined value for viewing, consumer interactions, and audience scale across all active platforms for both primetime TV and streaming shows. The company has attempted to create a single value for audience engagement by looking at video views and actions, including reactions, shares, and comments and weighting those actions against total audience size according to Nielsen and other sources.
- Through Shareablee's data, we see that long running shows with dedicated fanbases, such as GREY'S ANATOMY (ABC), SUPERNATURAL (CW), and RIVERDALE (CW), consistently rank in the Top 10. And, while its numbers are slightly lower than these relative powerhouses, the final season of ONCE UPON A TIME (ABC) is demonstrating an engaged audience to the end.
- The VPIs for well-publicized returns of AMERICAN IDOL (ABC) and ROSEANNE (ABC) show different patterns of audience engagement in their first few weeks of broadcast. AMERICAN IDOL, which relies on audience conversation to inform and motivate voting as the season progresses shows sustained social media activity, whereas ROSEANNE's spike during the week it premiered is illustrative of more likely audience behaviors for a traditional 30-minute sitcom.



- Regularly rounding out Shareablee's weekly Top 10 are several cable shows, include RUPAUL'S DRAG RACE, TUCKER CARLSON TONIGHT (FOX) and REAL TIME WITH BILL MAHER (HBO). Other broadcast and cable shows and specials — THE WALKING DEAD (AMC), SHOWTIME AT THE APOLLO (FOX), and THE FLASH (CW) among others — may appear in the Top 10 now and again but none are as consistent as the ones we've noted here.

Looking at audience behaviors for streaming shows is different for a variety of reasons. Full seasons typically drop all at once, so it's difficult to see what forces an uptick in a show's VPI value several weeks and months after it drops.

- STRANGER THINGS is a prime example. While Shareablee reported a VPI of 441 during the week the show premiered in late October and a VPI of 915 in mid-November, STRANGER THINGS marked an impressive 440 during the week of April 9-15, six months after season 2 dropped. Conversely, there are long stretches in Shareablee's rankings where STRANGER THINGS fails to make an appearance.
- Other streaming shows that log VPIs comparable to the Top 10 for broadcast TV include Netflix's CLUB DE CUERVOS (848), ON MY BLOCK (453), and EVERYTHING SUCKS (290), but those are generally only reported as one-week spikes and not necessarily tied to a premiere or drop date.
- Beyond these values, VPIs for other streaming shows drop into the double digits, which are likely comparable to the larger roster of broadcast and cable TV shows. Consider that THE HANDMAID'S TALE logged a VPI of 40 the week before season 2 dropped on Hulu; and, Netflix's re-boot of LOST IN SPACE registered a 16 in the days leading up to its launch on April 13. Each of these VPIs accounts for only a few thousand total social media actions versus the millions that are often seen for higher VPIs on broadcast.

While these snapshots are not perfect, the Shareablee data provides a way to consider social media behaviors in direct relation to audience scale. We'll continue to track and evaluate these metrics against other data sources and engagement models as they become available.

STREAMING STRATEGIES

As OTT platforms increase investments in original content (Netflix alone is putting \$8 billion behind new shows over the next year), we will likely see more variations in release strategies. Where CBS All Access and Hulu have followed a more traditional week-by-week release schedule with original shows like STAR TREK: DISCOVERY and THE HANDMAID'S TALE, in part to provide sustained value for advertisers on those platforms over weeks and months, Netflix and Amazon Prime generally opt to drop "full seasons" for their subscribers.

Since Nielsen has just begun to track and report OTT activity, we are still in the early days of recognizing what the apples and oranges look like across streaming platforms. While we wait for early numbers on the "premiere" of season 2 of THE HANDMAID'S TALE on Hulu, where the first two episodes dropped on April 25, here's a snapshot of what happened with STRANGER THINGS 2 (marketed as a sequel versus a second season) and LOST IN SPACE, an updated reboot of the 1960s TV classic, both on Netflix.

- Back in November, Nielsen reported that 15.8 million viewers had streamed the first episode of STRANGER THINGS 2 within the first three days of release (26 October) and that 361,000 people had binged the entire 10-episode story arc within the first 24 hours. Over the first three days, Nielsen reported that other episodes averaged roughly 4 million viewers. Since Netflix does not publicly release viewing data, the Nielsen numbers, along with social media activity, are the best ways to understand audience size and behaviors. As mentioned previously, the high VPI for STRANGER THINGS 2 in early April suggests that there is still strong interest and viewing for the show, but it is difficult to get a sense of the cumulative audience size for what has clearly become a pop culture phenomenon.
- While not nearly as high, the release of LOST IN SPACE is impressive. According to Nielsen, when Netflix dropped all 10 episodes on April 13, 6.3 million people watched an average of 2.5 hours of the show in the first three days; a whopping 1.2 million viewers watched all 10 episodes in that same period.

It will be interesting to see what numbers the show logs in coming months and how Nielsen will help us understand the context for week-over-week data for all streaming shows, both full-series drops and weekly releases. Understanding these trends will be critical to evaluating marketing and social media campaigns. A theatrical release comes with a big advertising and PR push to move people into cineplexes. And, each TV season with its premieres creates a moment to introduce viewers to a full slate of new and returning shows. In the OTT world, the rules and opportunities are different so it is important for us to understand marketing trends to define advertising opportunities. To appreciate this in scale, consider that Netflix's content investment is being supported by a \$2 billion marketing commitment.

KTG Content Strategy / Katz Media Group
Network Primetime & OTT Flash Report #6
2 May 2018

Editor: *Lisa Hollaender*

Authors: *Lisa Hollaender and Alex Chisholm (Digital & Social)*