

NETWORK PRIMETIME & OTT PROGRAMMING

Flash #1 - 6 October 2017

With the 2017-18 primetime season upon us, we wanted to give you an overall picture of the network landscape for premiere week as well as the content story in general, whether it be on broadcast television, cable or OTT. Aside from the traditional ratings, we have added “**What’s the Buzz**”, a fresh perspective on the performance of the new and returning programs across social media and what impact that may have on a series’ success.

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Keep in mind that this FLASH is only based on a week’s worth of ratings, it is to give you the “lay of the land”, and not to draw any solid conclusions. In the weeks to come, these Flash reports will initially cover primetime network stories and then 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). Data comparisons are being made to premiere week last season.*

WEEKLY HEADLINES

- *YOUNG SHELDON, WILL & GRACE and THE GOOD DOCTOR topped the freshman entries and their year ago time period levels. THIS IS US and THE BIG BANG THEORY came back with a growth story and while EMPIRE ruled FOX with a vengeance, the show is steadily losing audience.*
- *Primetime NFL FOOTBALL, both on Thursday and especially Sunday, grabs the most viewers, despite registering declines.*
- *CBS and NBC were the big winners in week one of the new season -- overall, by night and by program.*
- *Digital and social media provide valuable quantitative and qualitative data to help us better understand the context for what’s happening in ratings and shares.*

CHART TOPPERS: WEEKLY PRIMETIME WRAP-UP

#1 Network in Primetime = CBS in HH’s, NBC across key adults 18-49 and 25-54
 #1 Network from 10:30-11PM = CBS in HH’s, NBC in key adults
 #1 Network Regular Series (non-sports) = BIG BANG THEORY
 #1 Network Freshman Series = YOUNG SHELDON
 #1 Network Primetime Sports Series = NBC SUNDAY NIGHT FOOTBALL
 #1 Cable Network = ESPN
 #1 Cable Program = NFL Regular season game
 #1 Ent Cable Network = USA in HH’s, USA & TBS key adults
 #1 Ent Cable Program = HALLMARK ORIG MOVIE in HH’s, AMERICAN HORROR STORY: CULT key adults
 #1 News Cable Network = FNC
 #1 News Cable Program = HANNITY in HH’s, RACHEL MADDOW in key adults

BY THE NUMBERS

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

Overall Primetime Network Performance

- CBS finished the first week of the 2017-18 season #1 in HH's (5.4/10 L+SD NTI) while NBC placed 1st across the key demos (2.0/8 A18-49, 2.5/8 A25-54).
- NBC achieved #2 status in HH's (4.6/8) with CBS 2nd across the key demos.
- ABC took 3rd place across the board, followed by FOX and then the CW.
- The same standings held true over the 2016-17 premiere week.
- On average, the networks turned in a relatively stable year-to-year performance, flat-to-up or down less than a rating point and a share point except for CBS, which was off by 2 shares in A18-49 and A25-54.
- ABC turned in the most consistent YOY performance across the board.

NTI PRIMETIME AVERAGES

2017-18: 09/25/2017 - 10/01/2017

	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
ABC	3.7	7	0.9	5	1.3	5	1.7	6	5799
CBS	5.4	10	1.0	5	1.6	6	2.3	7	8796
NBC	4.6	8	1.4	7	2.0	8	2.5	8	7522
FOX	2.1	4	0.7	4	1.0	4	1.2	4	3327
CW	0.7	1	0.2	1	0.2	1	0.3	1	1030

2016-17: 09/19/2016 - 09/25/2016

	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
ABC	3.7	7	0.9	4	1.3	5	1.7	5	5753
CBS	6.4	11	1.5	7	2.2	8	2.9	9	10416
NBC	5.2	9	1.8	8	2.4	9	3.0	9	8539
FOX	2.3	4	0.9	4	1.2	4	1.4	4	3818
CW	0.7	1	0.2	1	0.3	1	0.4	1	1047

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-F

% Diff 2017-18 vs 2016-17 -- Primetime - Week 1

	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	-2%	1%	1%	15%	1%	10%	2%	8%	1%
CBS	-16%	-13%	-31%	-22%	-25%	-19%	-21%	-16%	-16%
NBC	-12%	-9%	-24%	-15%	-17%	-10%	-17%	-12%	-12%
FOX	-12%	-9%	-22%	-12%	-18%	-11%	-15%	-10%	-13%
CW	-3%	0%	-23%	-13%	-12%	-4%	-9%	-4%	-2%

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

- Matching primetime's overall findings, CBS turned in the highest rated performance in HH's (4.4/9) for the half hour leading up to the local news while NBC achieved a 1st place finish in A18-49 (1.6/7) and A25-54 (2.0/7).
- CBS was 2nd from 10:30-11PM among key adults and ABC landed at #3.
- The outcome was similar versus premiere week last September with ABC remaining the most stable.

NTI 10:30-11PM AVERAGES

2017-18: 09/25/2017 - 10/01/2017

	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
ABC	3.5	7	0.8	4	1.1	5	1.5	5	5466
CBS	4.4	9	0.8	4	1.2	5	1.8	6	7020
NBC	4.0	8	1.0	5	1.6	7	2.0	7	6352

2016-17: 09/19/2016 - 09/25/2016

	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
ABC	3.0	6	0.8	4	1.1	4	1.5	5	4539
CBS	5.5	10	1.2	6	1.8	7	2.3	7	8593
NBC	4.8	9	1.5	7	2.2	8	2.7	8	7600

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-F

% 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	19%	23%	-2%	11%	-2%	7%	1%	8%	20%
CBS	-19%	-16%	-34%	-26%	-29%	-23%	-23%	-18%	-18%
NBC	-16%	-13%	-34%	-25%	-25%	-18%	-25%	-19%	-16%

TOP IT OFF: TOP 10, TOP 15, TOP25 PROGRAMS

- YOUNG SHELDON was the only freshman series to achieve a top 10 ranking in HH's and key adult demos, while WILL & GRACE earned that honor in A18-49 and A25-54.
- THE GOOD DOCTOR fell into the top 10 in HH's only, but was a top 15 player among key adults.
- SEAL TEAM and ME, MYSELF & I hit the top 25 in HH's, A18-49 and A25-54.
- WISDOM OF THE CROWD was in top 25 HH's only.
- LAW & ORDER TRUE CRIME earned a top 25 showing among key adults.
- GHOSTED tied for 20th in A18-34 along with its animation domination compadres BOB'S BURGERS and FAMILY GUY.

2017-2018 Season / Network Primetime Ranking: Regular Programs-L+SD

TOP 25

RNK	HH	RTG	SHR	RNK	A18-34	RTG	SHR	RNK	A18-49	RTG	SHR	RNK	A25-54	RTG	SHR	
1	BIG BANG THEORY, THE	CBS	30.5	12	1 SUN NIGHT FOOTBALL	NBC	4.7	22	1 SUN NIGHT FOOTBALL	NBC	5.2	21	1 SUN NIGHT FOOTBALL	NBC	6.6	20
2	YOUNG SHELDON	CBS	30.0	17	2 NFLN THU NT FOOTBALL	CBS	4.0	21	2 NFLN THU NT FOOTBALL	CBS	4.3	20	2 BIG BANG THEORY, THE	CBS	5.2	18
3	SUN NIGHT FOOTBALL	NBC	9.6	17	3 THE IS US	NBC	2.6	13	3 BIG BANG THEORY, THE	CBS	4.1	16	3 NFLN THU NT FOOTBALL	CBS	5.6	19
4	NFLN THU NT FOOTBALL	CBS	8.9	17	4 FTBL NT AMERICA PT3	NBC	2.4	12	4 THIS IS US	NBC	3.9	14	4 YOUNG SHELDON	CBS	5.5	16
5	NCIS	CBS	8.2	14	5 BIG BANG THEORY, THE	CBS	2.2	11	5 YOUNG SHELDON	CBS	3.8	14	5 THE IS US	NBC	4.9	14
6	THIS IS US	NBC	7.9	14	6 EMPIRE	FOX	2.0	11	6 FTBL NT AMERICA PT3	NBC	3.2	13	6 WILL & GRACE	NBC	3.9	12
7	60 MINUTES	CBS	7.6	13	7 YOUNG SHELDON	CBS	1.9	9	7 WILL & GRACE	NBC	3.0	11	7 FTBL NT AMERICA PT3	NBC	3.2	12
8	GOOD DOCTOR, THE	ABC	7.3	13	7 GREY'S ANATOMY	ABC	1.9	10	8 VOICE 13-TUE	NBC	2.7	11	8 VOICE 13-TUE	NBC	3.5	11
9	VOICE 13-TUE	NBC	6.6	12	9 VOICE 13	NBC	1.8	8	9 VOICE 13	NBC	2.6	9	9 KEVIN CAN WAIT	CBS	3.4	9
10	VOICE 13	NBC	6.4	11	9 VOICE 13-TUE	NBC	1.8	10	10 EMPIRE	FOX	2.4	10	10 VOICE 13	NBC	3.3	10
11	WILL & GRACE	NBC	6.4	11	11 FTBL NT AMERICA PT2	NBC	1.7	9	11 GREY'S ANATOMY	ABC	2.3	9	11 60 MINUTES	CBS	2.9	9
12	BULL	CBS	6.3	11	12 GOOD DOCTOR, THE	ABC	1.6	8	11 KEVIN CAN WAIT	CBS	2.3	8	12 EMPIRE	FOX	2.8	9
13	BLUE BLOODS	CBS	6.2	13	13 WILL & GRACE	NBC	1.5	7	13 GOOD DOCTOR, THE	ABC	2.2	8	12 GREY'S ANATOMY	ABC	2.8	9
14	KEVIN CAN WAIT	CBS	6.1	10	14 STAR	FOX	1.4	7	14 MODERN FAMILY	ABC	2.1	8	12 MODERN FAMILY	ABC	2.8	9
15	SEAL TEAM	CBS	6.0	10	15 60 MINUTES	CBS	1.3	7	14 FTBL NT AMERICA PT2	NBC	2.1	9	15 GOOD DOCTOR, THE	ABC	2.7	8
16	FTBL NT AMERICA PT3	NBC	5.7	10	16 MODERN FAMILY	ABC	1.2	6	14 60 MINUTES	CBS	2.1	8	16 FTBL NT AMERICA PT2	NBC	2.5	8
17	DANCING-STAR 23	ABC	5.6	9	16 KEVIN CAN WAIT	CBS	1.2	5	17 GOLDBERGS, THE	ABC	1.8	8	16 SURVIVOR 33	CBS	2.5	8
17	NCIS: LOS ANGELES	CBS	5.6	10	16 SAT NIGHT FOOTBALL	ABC	1.2	7	17 SURVIVOR 33	CBS	1.8	7	18 NCIS	CBS	2.4	8
17	NCIS: NEW ORLEANS	CBS	5.6	11	16 SIMPSON	FOX	1.2	6	17 STAR	FOX	1.8	7	18 GOLDBERGS, THE	ABC	2.4	8
20	WISDOM OF THE CROWD	CBS	5.5	9	20 BOB'S BURGERS	FOX	1.1	6	20 LB O: TRUE CRIME	NBC	1.6	7	18 ME, MYSELF & I	CBS	2.4	7
21	HAWAII FIVE-0	CBS	5.3	10	20 G HOSTED	FOX	1.1	5	20 ME, MYSELF & I	CBS	1.6	5	21 AMERICAN HOUSEWIFE	ABC	2.2	7
22	GREY'S ANATOMY	ABC	5.2	9	20 FAMILY GUY	FOX	1.1	5	20 NCIS	CBS	1.6	7	21 SEAL TEAM	CBS	2.2	7
23	SURVIVOR 33	CBS	5.0	9	23 LB O: TRUE CRIME	NBC	1.0	5	20 AMERICAN HOUSEWIFE	ABC	1.6	6	23 STAR	FOX	2.1	6
24	CHICAGO FIRE	NBC	4.6	9	23 SURVIVOR 33	CBS	1.0	6	24 SEAL TEAM	CBS	1.5	6	23 LB O: TRUE CRIME	NBC	2.1	7
25	ME, MYSELF & I	CBS	4.5	8	23 DANCING-STAR 23	ABC	1.0	4	24 SAT NIGHT FOOTBALL	ABC	1.5	7	25 BULL	CBS	2.0	6
									24 CHICAGO FIRE	NBC	1.5	6				

Source: NIELSEN'S NNTV, L+SD, 7/15-7/27/17.

Network by special time rating.

News series in the 2017-2018 season are highlighted in bold.

TOP 25 PROGRAMS: NETWORK TALLY

Number of Programs per Demo

- CBS boasted the most number of programs in the top 25 HH's and A25-54 and tied with NBC in A18-49.

	HH's	A18-34	A18-49	A25-54
ABC	3	5	5	5
CBS	15	6	9	10
NBC	7	8	9	8
FOX	0	6	2	2

SCORECARD: WHO TOOK THE NIGHT?

- Overall, CBS carried much of the week, #1 across the board on Monday (BIG BANG, YOUNG SHELDON), Thursday (FOOTBALL) and FRIDAY (combination of HAWAII 5-0, BLUE BLOODS and MACGYVER), #1 in HH's on Tuesday (NCIS' and BULL) and Wednesday (SURVIVOR, SEAL TEAM and CRIMINAL MINDS).
- NBC topped its competitors on Sunday with SUNDAY NIGHT FOOTBALL and was #1 on Tuesday in key adults with primarily THIS IS US and THE VOICE.
- FOX finished 1st on Wednesday among key adults with its musical soap EMPIRE/STAR combination.

NIGHT-BY-NIGHT SCORECARD WINS

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

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

ON THE CABLE FRONT

- Thanks to NFL FOOTBALL, ESPN is the top overall cable network in HH's and key adults. Monday's game delivered an 8.2/15 in HH's, a 5.0/19 in A18-49 and a 5.7/18 in A25-54, on par, and even above, most network performances. Breaking it down more specifically, the top Entertainment Cable network was USA in HH's and USA and TBS among key adults. The top News Cable network was FNC across the board.
- HALLMARK's ORIGINAL SATURDAY NIGHT MOVIE was #1 on the entertainment front in HH's (1.9/4) while FX's AMERICAN HORROR STORY finished 1st in A18-49 (1.1/4) and A25-54 (1.0/3). HANNITY was #1 among the news networks in HH's (2.2/4) with RACHEL MADDOW attracting key adults (0.3/1 A18-49, 0.5/2 A25-54). 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 with what the networks are delivering.

OVER THE TOP

- While several new shows have been launched on OTT services in recent weeks, including BOJACK HORSEMAN (Netflix), ONE MISSISSIPPI (Amazon), THE MINDY PROJECT (Hulu), AMERICAN VANDAL (Netflix), FULLER HOUSE (Netflix), and TRANSPARENT (Amazon), we note very little news or audience chatter around these early season releases in the crunch of premiere week on the broadcast networks.
- We do find, however, that marketing efforts and fan chatter is starting to pick up for two series coming to Netflix in the coming weeks: MINDHUNTER on October 13 and the second season of STRANGER THINGS on October 27. We will have more on Netflix's moves with these shows next week, especially since the streaming service this week announced a price hike that will be rolled out to subscribers in the months to come.

WHAT'S THE BUZZ?

- While ratings are still the established currency of our business, it's becoming increasingly important to understand how audiences use digital and social media in relation to TV viewing. Quantitative and qualitative data ranging from the number of streaming service subscribers and app downloads to how many "Likes", "Shares", "Tweets", and "Re-Tweets" a show inspires to online "buzz" before, during, and (especially) after a broadcast enable us to develop important insights about audience engagement.
- For example, social media posts on Facebook and Twitter provide an online record for what used to be the ephemeral living room chatter during broadcasts and "watercooler" conversations the morning after. These conversations now take place online in real-time while shows are being broadcast as well as after, driving Live +7, DVR, on-demand, and streaming viewers in the days, weeks, and months after a show airs.
- Before and during "premiere week" this season, our team began tracking more than 60 new and returning shows on broadcast, cable, and OTT services to better understand what's behind "the numbers" detailed in our Flash Report. Our aim is to include a snapshot of our findings here and in subsequent Flash Reports, providing additional context for the rapidly changing TV marketplace.

Facebook Likes and Twitter Followers

To start, consider the number of "Likes" and "Followers" a show generates on Facebook and Twitter. By looking at the numbers for both new and returning shows, we immediately get a sense of scale and can develop some insights into what's happening as shows attract (or repel) viewers.

**Social Media Audiences for the Fall 2017 TV Season
(as of Wednesday, 4 October 2017)**

	Show	Facebook "Likes"	Twitter Followers
New	<i>Will & Grace (NBC)</i>	1,112,534	45,538
	<i>The Good Doctor (ABC)</i>	557,035	22,790
	<i>Young Sheldon (CBS)</i>	292,791	12,336
	<i>SEAL Team (CBS)</i>	129,956	6,715
	<i>The Orville (Fox)</i>	84,244	33,377
	<i>The Brave (NBC)</i>	32,777	2,497
Returning	<i>The Big Bang Theory (CBS)</i>	31,906,530	4,672,267
	<i>Grey's Anatomy (ABC)</i>	22,930,870	4,073,742
	<i>The Voice (NBC)</i>	17,019,035	5,180,242
	<i>Empire (Fox)</i>	5,369,100	1,480,013
	<i>This Is Us (NBC)</i>	3,220,806	229,000

Source: Facebook and Twitter, October 2017

- Although established shows with tens of millions of "Likes" and "Followers" increased their social media audiences by less than 1% during premiere week, new shows saw daily gains of between 5%-10%. In fact, in the 24 hours following a new show premiere, social media audiences registered double digit percentage gains, ranging from 10% to almost 100%.
- For example, THE GOOD DOCTOR had 7,189 Followers on Monday, September 25th, the day it premiered. By Tuesday morning, that number had almost doubled to 14,274, an increase of 98%. And, by the following Tuesday, October 3rd, the morning after the second episode aired, the original number had almost tripled to 21,856. WILL & GRACE, which had 30,269 Twitter Followers on the day of its premiere, Thursday, September 28th, saw its number increase to 42,054 by Friday morning, a 39% increase. We plan to keep an eye on these numbers in the coming weeks to see what happens and how they correlate to Nielsen ratings.

Here and There and Everywhere

Following are interesting social reactions to, and posts across, several new and returning shows:

THE GOOD DOCTOR

- From Facebook and Twitter posts, it's clear viewers are becoming invested in this show and its Autistic lead character. Viewers seem to appreciate learning more about autism through the show's storytelling.
 - "Freddie Highmore is amazing and I love how accurate his portrayal is. My 10-year old is autism spectrum and this show gives me so much hope. Thank you, ABC, for shining a light on autism and showing that people on the spectrum can live wonderful lives if given the chance." (Samantha Myers, 3 October)
 - "An excellent show! My son has high functioning autism so it helps Hunter identify. I love how ABC is showing people that people with high functioning autism can lead productive lives. This gives my son a new lease! Thank you ABC!!!! I'm so beyond grateful! My son has overcome brain cancer and living with struggles with autism this gives us so much hope" (Wendi Goad, 3 October)
 - "I am already loving THE GOOD DOCTOR! And, with that said, I think THE GOOD DOCTOR is the ST. ELSEWHERE of the 21st Century! I like how Dr. Shaun Murphy (Freddie Highmore) does his job practicing medicine on this show! He also makes a great surgeon and saves lives!" (Sean Patrick Leary, 3 October)
- Kerry Magro, an award-winning international motivational speaker and best-selling author who's on the autism spectrum, recently posted a [blog](#) entry that began: "Full disclosure: After only watching one episode, I have no idea what the future is for THE GOOD DOCTOR. What I can tell you: this show has all the makings of an ABC smash hit."

THIS IS US

- THIS IS US debuted its second season this week, the tissues came out and it did not disappoint. Select Tweets from the premiere week include:
 - *"Just watched the first episode of season 2, makes me feel all warm and fuzzy. Feels like home (heart image)."*
 - *"Is it bad that its Friday but I wish it was Monday so that when I go to bed, I wake up knowing that This is Us is coming on (crying smiling image)."*
 - *"Husband home from week-long business trip. Wine poured. Frozen pizza in the oven. This is Us on DVR. This is #Friday as an adult (hands, celebration image)."*
 - *"The best part? That we get to spend Tuesdays with our #ThisIsUs family again."*
 - *"Re-watched #ThisIsUs for the 4th time tonight and STILL BAWLING my heart out-gawd U guys...all the feels."*
 - *"Love is alive and well. Rebecca and Jack are the best married couple on TV since Eric & Tammy Taylor. #ThisIsUs #FNL (FRIDAY NIGHT LIGHTS)."*

THE VOICE

- THE VOICE has released a new app for this season and it is a major upgrade designed to increase fan engagement. Viewers can now Tweet coaches and contestants directly, as well as interact with Twitter directly in contestant voting (i.e., you don't have to open Twitter, the new app does it automatically). Users can also jump to iTunes to purchase performance recordings from the show (Note: when viewer voting begins later this season, iTunes downloads will count as 5 votes, as in previous seasons).
- The most interesting part of the new app provides an experience akin to "Fantasy Football." Users can now create their own *Voice* team of favorite performers. There are direct links to post and promote these teams to social media accounts. Users can also review clips of each contestant and remove them from their teams. The app also provides exclusive "Behind the Scenes" clips about team members. A leaderboard shows how viewer-selected teams compare with others.

SEAL TEAM and THE BRAVE

- This season brings the arrival of two new military-inspired series. SEAL TEAM (CBS) puts viewers in the middle of fictional missions of the Navy's most elite soldiers, while interweaving stories of their interpersonal and family lives. THE BRAVE (NBC) is an action drama that takes viewers behind the strategies and dangers the military face while protecting and saving people in tense parts of the world.
- Whereas SEAL TEAM reportedly consults with four full-time military advisors to help give it some authenticity, a review posted to [*Task & Purpose*](#), a military blog suggested that THE BRAVE was "fun but not a 'military drama.'"
 - *"While The Brave gets points for being entertaining, it misfires when it comes to capturing the complexity and ambiguity of post-9/11 wartime military service, but maybe as the show picks up that'll change. Either that, or the characters can just swap uniforms for lab coats and it can be rebranded as CSI: Baghdad."*
- Early Twitter comments for SEAL TEAM focused on a dog that was in the show and various one-liners related to the dog (i.e. "Don't tell the dog to sit because he only sits when he finds explosives"). During the last half of the show comments included:
 - *"A really great show. Y'all have a hit on your hands!"*
 - *"Haven't been this excited about a new show for a long time."*
 - *"I liked it, hope there will be some back stories on how each one became a part of the unit."*

Rotten or Fresh

- Finally, while Rotten Tomatoes has been targeted as a possible contributor to a soft summer at the box office and has only started to expand its tracking of television reviews, it's interesting to note that several new shows seem to be defying the trend of being classified as "rotten" and not finding an audience.
- Two shows proving strong right out of the gate, THE ORVILLE and THE GOOD DOCTOR have "rotten" ratings of 20% and 37%, respectively, yet rank in the Top 20, according to Nielsen.
- On the upside, the WILL & GRACE re-boot boasts an 85% "fresh" rating, while returning fan favorites post similarly high scores: GREY'S ANATOMY (86%) and THIS IS US (93%).

PROGRAM PERFORMANCE & NIGHT-BY-NIGHT DELIVERIES

Monday, 9/25/17

MONDAY

Network			P2+ 000's	HH Rtg	HH Shr	A18-49 Rtg	A18-49 Shr	A25-54 Rtg	A25-54 Shr	W18-49 Rtg	W18-49 Shr	W25-54 Rtg	W25-54 Shr	M18-49 Rtg	M18-49 Shr	M25-54 Rtg	M25-54 Shr
ABC		8-11PM	9503	6.1	11	1.6	6	2.1	6	2.2	8	2.8	8	1.0	4	1.3	4
CBS		8-11PM	10680	6.4	11	2.3	8	3.3	10	2.5	9	3.6	10	2.1	8	3.1	9
NBC		8-11PM	9058	5.5	9	2.2	8	2.8	8	2.7	9	3.3	9	1.7	6	2.2	7
FOX		8-10PM	1910	1.2	2	0.5	2	0.7	2	0.7	2	0.9	2	0.4	1	0.5	2
CW		8-10PM	900	0.6	1	0.2	1	0.3	1	0.2	1	0.3	1	0.2	1	0.3	1



- THE BIG BANG THEORY, its spinoff YOUNG SHELDON, new hour drama THE GOOD DOCTOR, THE VOICE 13 and CBS were the big winners on Monday night.
- THE BIG BANG THEORY season opener began with a “yes” to the cliffhanger marriage proposal and an unexpected pregnancy, sparking a 1st place finish in HH’s (10.5/18 NTI) and all key demos, boasting the top spot from 8-8:30PM and for the night.
- BIG BANG’s exemplary performance, far more stellar than its competitors, also achieved gains over last season’s premiere episode across the board lending a huge lead-in to the launch of YOUNG SHELDON. The much-anticipated debut of Sheldon Cooper’s early years did not disappoint with the sitcom earning a 10.0/17 in H’s, a 3.8/14 in A18-49 and a 5.5/16 in A25-54, holding onto a good portion of BANG’s lead-in (4.1/16 A18-49, 5.8/18 A25-54), much more so than KEVIN CAN WAIT did in its premiere last September at 8:30PM where it was down -5 shares in HH’s and A18-49 and off -6 shares in A25-54. We’ll have to wait until November to see episode two what else YOUNG SHELDON is up to.
- THE VOICE 13 (6.4/11 HH) was #1 from 9-10PM, but with the addition of coaches Miley Cyrus and Jennifer Hudson, was off year ago’s season premiere by 2 shares among key adults.
- ABC’s THE GOOD DOCTOR, leading out of DWTS 25, garnered a 7.2/13 in HH’s and was #1 in the time period across all key demos. The medical drama stitched up the hour by posting shares more than double what the since-cancelled CONVICTION delivered in its 2016 fall debut.
- Finishing 2nd in the last hour of primetime in HH’s (3.8/7) and all key demos was NBC’s freshman series THE BRAVE, which dropped considerably from its VOICE lead-in and under achieved what TIMELESS delivered to the time period in its premiere last fall.

Tuesday, 9/26/17

TUESDAY

Network			P2+ 000's	HH Rtg	HH Shr	A18-49 Rtg	A18-49 Shr	A25-54 Rtg	A25-54 Shr	W18-49 Rtg	W18-49 Shr	W25-54 Rtg	W25-54 Shr	M18-49 Rtg	M18-49 Shr	M25-54 Rtg	M25-54 Shr
ABC		8-11PM	6834	4.5	8	1.2	5	1.6	5	1.6	6	2.1	6	0.9	4	1.1	4
CBS		8-11PM	10708	6.7	12	1.3	5	2.0	6	1.4	5	2.3	7	1.1	5	1.8	6
NBC		8-11PM	10015	6.2	11	2.8	11	3.5	11	3.7	13	4.6	13	1.8	8	2.3	8
FOX		8-10PM	3350	2.1	4	1.0	4	1.2	4	1.1	4	1.3	4	0.9	4	1.2	4
CW		8-10PM	639	0.4	1	0.2	1	0.2	1	0.2	1	0.3	1	0.2	1	0.2	1



- Family drama THIS IS US returned to NBC primetime on Tuesday for its sophomore season and the tissue count was as high as its overall performance.

- THIS IS US not only achieved the top spot Tuesday across all key demos (3.9/14 A18-49, 4.9/14 A25-54, 5.3/18 W18-49, 6.6/18 W25-54, 2.4/10 M18-49 3.0/10 M25-54), but was #1 from 9-10PM. "The Big Three" also boasted substantial increases over its year ago 10PM debut by +3 to +4 shares across key adults, +4 to +6 shares among key women and +2 shares in key men. Most impressive was the rating and share gains over its VOICE lead-in (+3 shares in key adults, +5 shares in key women and +1 to +2 shares in key men), which is a tough accomplishment.
- THE VOICE 13 finished 1st from 8-9PM across all key demos as well, but turned in declines across the board (-1 to -2 shares) from 9/20/16.

Wednesday, 9/27/17

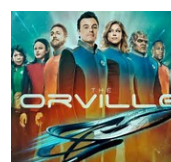
WEDNESDAY				P2+ 000s	HH Rtg	HH Shr	A18-49 Rtg	A18-49 Shr	A25-54 Rtg	A25-54 Shr	W18-49 Rtg	W18-49 Shr	W25-54 Rtg	W25-54 Shr	M18-49 Rtg	M18-49 Shr	M25-54 Rtg	M25-54 Shr
Network																		
ABC		8-11PM		5822	3.6	7	1.5	6	2.0	7	1.8	7	2.4	7	1.3	5	1.7	6
CBS		8-11PM		8401	5.1	9	1.5	6	2.2	7	1.7	6	2.4	7	1.4	6	1.9	7
NBC		8-11PM		6047	3.8	7	1.3	5	1.7	5	1.4	5	1.9	6	1.1	5	1.4	5
FOX		8-10PM		6241	3.9	7	2.1	8	2.5	8	2.8	10	3.3	10	1.4	6	1.7	6
CW		8-10PM		657	0.4	1	0.2	1	0.2	1	0.2	1	0.2	1	0.2	1	0.2	1



- EMPIRE ruled Wednesday across key adults, women and M18-49, finishing #1st in NTI's from 8-9PM and for the night. Though it achieved this level of performance, the EMPIRE has been crumbling year-to-year. The fourth season premiere of EMPIRE achieved a 4.4/8 in HH's, down from a 6.4/11 from year ago, a 2.4/10 (from a 4.2/14) in A18-49, a 2.8/9 (from a 4.6/13) in A25-54, a 3.2/12 (from a 5.4/17) in W18-49, a 3.7/12 (from a 6.0/16) in W25-54, a 1.7/7 (from a 2.8/10) in M18-49 and a 2.0/7 (from a 3.1/9) in M25-54.
- Comparing it to its first September debut episode in 2015 (it premiered in January 2015), EMPIRE's performance exhibited significant share losses, down -7 shares in HH's, -9 to -11 shares among key adults, -10 to -13 shares in key women and -7 to -9 shares across key men.
- EMPIRE's closest competitor for the evening was the season premiere of MODERN FAMILY, which boasted a win for the 9-9:30PM half hour across all demos.
- SEAL TEAM, the only freshman entry on Wednesday, turned in the #1 performance in HH's (6.0/10) and key men (1.5/6 M18-49, 2.1/7 M25-54) from 9-10PM and for all of primetime. Versus CRIMINAL MINDS year ago 9PM premiere, SEAL TEAM was relatively on target with its performance, posting a slight loss among the key women shares.

Thursday, 9/28/17

THURSDAY				P2+ 000s	HH Rtg	HH Shr	A18-49 Rtg	A18-49 Shr	A25-54 Rtg	A25-54 Shr	W18-49 Rtg	W18-49 Shr	W25-54 Rtg	W25-54 Shr	M18-49 Rtg	M18-49 Shr	M25-54 Rtg	M25-54 Shr
Network																		
ABC		8-11PM		6702	4.4	8	1.9	7	2.3	7	2.8	10	3.3	10	1.0	4	1.2	4
CBS		7:30-11:29PM		12904	7.9	15	4.1	17	4.8	17	2.9	12	3.5	12	5.3	23	6.2	22
NBC		8-11PM		6498	4.1	7	1.6	6	2.1	7	2.0	7	2.6	8	1.3	5	1.6	5
FOX		8-10PM		3268	2.0	4	1.0	4	1.2	4	0.8	3	1.0	3	1.2	5	1.4	5
CW		8-10PM		1337	0.8	1	0.3	1	0.4	1	0.3	1	0.4	1	0.3	1	0.5	2



- THURSDAY NIGHT FOOTBALL dominated most of the night scoring a touchdown for CBS and boasting the highest rated performance against the other networks' entertainment programming

across HH's, key adults and men. The game itself delivered an 8.9/17 NTI in HH's, a 4.8/20 in A18-49, a 5.6/19 in A25-54, a 6.2/26 in M18-49 and a 7.3/26 in M25-54.

- In W18-49, it was a close race between GREY'S ANATOMY (3.5/13), FOOTBALL (3.4/14) and the return of WILL & GRACE (3.7/13) in overall primetime.
- The long awaited and heavily promoted debut of WILL & GRACE was NBC's highest rated show of the night. With their chemistry intact, it was as if they hadn't been apart for 11 seasons. This politically charged and comical opening episode brought Will, Grace, Karen and Jack home to Thursday night where the foursome garnered a 6.4/11 in HH's, a 3.0/11 in A18-49, a 3.9/12 in A25-54, a 3.7/13 in W18-49, a 4.8/14 in W25-54, a 2.3/8 in M18-49 and a 3.0/9 in M25-54. To put its performance into perspective, the first time around, WILL & GRACE was a top 10 player on NBC for a good part of its run, delivering high teen, low twenty shares. It finished its last season (2005-06) tied for #55 in HH's (5.9/9 L+7), tied for 40th in A18-49 (3.6/10 L+7) and tied for 49th in A25-54 (4.1/10 L+7). Despite weaker lead-in and lead out programming, which delivered less than half of the "relevant pop culture" sitcom's ratings and shares, WILL & GRACE was a tent pole for NBC, but not enough to put the network higher than #3 in HH's, key adults and women.
- FOX's freshman series THE ORVILLE is surviving in outer space, beaming up slightly from its GOTHAM lead-in on Thursday, but on a downward trajectory from week one to week four. Hopefully it will level off going forward. Keep in mind that THE ORVILLE premiered on a Sunday post-football for its first two episodes, giving its performance a huge boost. It moved to Thursdays two weeks ago and while it is slightly off from last week across key demos, it has remained status quo in M18-49 (1.3/5).

Friday, 9/29/17

FRIDAY

Network			P2+ 000s	HH Rtg	HH Shr	A18-49 Rtg	A18-49 Shr	A25-54 Rtg	A25-54 Shr	W18-49 Rtg	W18-49 Shr	W25-54 Rtg	W25-54 Shr	M18-49 Rtg	M18-49 Shr	M25-54 Rtg	M25-54 Shr
ABC		8-11PM	3485	2.3	4	0.8	4	1.1	4	0.8	4	1.2	4	0.7	3	1.1	4
CBS		8-11PM	8457	5.2	10	1.0	5	1.6	6	1.1	5	1.8	6	0.9	4	1.5	6
NBC		8-11PM	4443	3.0	6	0.8	3	1.1	4	0.9	4	1.3	5	0.6	3	0.8	3
FOX		8-10PM	2311	1.4	3	0.7	3	0.9	3	0.8	4	1.0	4	0.6	3	0.7	3
CW		8-10PM	947	0.6	1	0.2	1	0.3	1	0.2	1	0.3	1	0.2	1	0.2	1



- CBS, BLUE BLOODS, HAWAII 5-0 and MACGYVER were the overall winners on season premiere Friday across the board. HAWAII 5-0 and BLUE BLOODS were #1 in HH's with a 5.3/10 NTI and a 6.2/13 NTI, respectively, and finished 1st across all key demos from 9-10PM and 10-11PM. Sophomore series MACGYVER was #1 in HH's (4.1/8), A25-54, W25-54 and key men, but yielded to HELL'S KITCHEN in A18-49 (0.9/4) and W18-49 (1.0/5).
- While BLUE BLOODS remained the most consistent with last year's season premiere and HAWAII 5-0 was down by an insignificant amount, MACGYVER turned in sizeable losses of -5 shares in HH's, -4 shares among key adults, W25-54 and key men and was down -3 shares in W18-49.
- The two-hour premiere of MARVEL's INHUMANS earned a 2.4/5 in HH's, and delivered just above a one rating in the key 25-54 demos and below a one rating in the key 18-49 demos. INHUMANS underperformed what LAST MAN STANDING, DR. KEN and SHARK TANK averaged at the beginning of the 2016-17 season across the board.

Saturday, 9/30/17

SATURDAY

Network			P2+ 000s	HH Rtg	HH Shr	A18-49 Rtg	A18-49 Shr	A25-54 Rtg	A25-54 Shr	W18-49 Rtg	W18-49 Shr	W25-54 Rtg	W25-54 Shr	M18-49 Rtg	M18-49 Shr	M25-54 Rtg	M25-54 Shr
ABC		8-11:43PM	4566	2.7	6	1.5	7	1.7	6	1.0	5	1.2	4	1.9	9	2.3	9
CBS		8-11PM	3454	2.3	5	0.5	2	0.7	3	0.6	2	0.8	3	0.4	2	0.6	2
NBC		8-11PM	2414	1.6	3	0.5	2	0.7	2	0.6	2	0.8	3	0.5	2	0.6	2
FOX		8-10PM	2685	1.6	3	0.8	3	0.9	3	0.6	2	0.7	2	0.9	4	1.1	4

- Sports, repeats and true crime are the common fare for Saturday night.

- ABC's SATURDAY NIGHT FOOTBALL (Clemson versus Virginia Tech) propelled ABC to the win in HH's (2.7/6) and all key demos for the night.
- CBS was #2 in HH's (2.3/5) and neck and neck among key women with NBC's sitcom and vintage SNL repeats and DATELINE SATURDAY NIGHT MYSTERY.
- FOX was #2 in key adults and men with its BIG 12 PRIME COLLEGE FOOTBALL game.

Sunday, 10/1/17

SUNDAY

Network		P2+ 000s	HH Rtg	HH Shr	A18-49 Rtg	A18-49 Shr	A25-54 Rtg	A25-54 Shr	W18-49 Rtg	W18-49 Shr	W25-54 Rtg	W25-54 Shr	M18-49 Rtg	M18-49 Shr	M25-54 Rtg	M25-54 Shr
ABC	7-11PM	3963	2.4	4	0.9	3	1.2	3	0.9	3	1.3	4	0.9	3	1.1	3
CBS	7-11PM	8862	5.5	10	1.4	5	2.0	6	1.3	5	2.0	6	1.5	6	2.1	6
NBC	7:30-11:33PM	14736	8.4	15	5.1	19	5.8	17	3.5	13	4.2	13	6.7	24	7.4	22
FOX	7-10PM	3183	1.9	3	1.3	5	1.5	5	1.0	4	1.1	3	1.6	6	1.9	6



- NBC SUNDAY NIGHT FOOTBALL (Indianapolis Colts at Seattle Seahawks) easily won the night and led NBC to victory. The game itself (8:31-11:33PM), achieved a 9.6/17 HH NTI (11.7/20) with high scores across the key demos as well. SNF garnered the top demos, but posted declines across the board from last season's (Chicago/Dallas) game on 9/25/16 -- a 5.8/21 (versus a 7.6/24) in A18-49, a 6.6/20 (versus an 8.7/24) in A25-54, a 4.0/15 (versus a 5.4/18) in W18-49, a 4.7/14 (versus a 6.3/17) in W25-54, a 7.6/27 (versus a 9.7/31) in M18-49 and an 8.4/25 (versus an 11.1/30) in M25-54.
- With NFL run over into primetime, CBS' line-up was given a boost, but with the odd timing of the programs, it is harder to get a handle on their true time period performance. With that said, freshman WISDOM OF THE CROWD (5.5/9 HH's) earned a competitive performance with the rest of the CBS programs (except for 60 MINUTES), but slightly underperformed NCIS: LA's two-hour season premiere last year.
- FOX's animation domination season premiere line-up and its new live action comedy GHOSTED put the network in 3rd place among key adults, W18-49 and M25-54 and 2nd in M18-49 in overall primetime.
- GHOSTED (2.1/4 in HH's) not only achieved increases from its SIMPSONS lead-in, but topped SON OF ZORN's year ago "official" premiere in the time period across the board. GHOSTED also turned in the highest rated performance of all the FOX Sunday night series apart from A18-49 and M18-49 where it tied with THE SIMPSONS.
- The 10-episode critically acclaimed TEN DAYS IN THE VALLEY debuted its first hour posting a 2.3/5 in HH's versus QUANTICO's 2.5/5 September 2016 season premiere. Across the key demos, TEN DAYS was off year ago, registering one of the lowest performances of the evening, under a one rating except in W25-54 (1.0/3) and below year ago time period with the larger drop-off in key women (from a 1.3/4 to a 0.6/2 in W18-49 and a 1.6/5 to a 1.0/3 in W25-54). One episode does not a season make and we'll see how the show progresses over the next few weeks.

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

KTG Content Strategy / Katz Media Group
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