

# FALL 2018 PRIMETIME PREVIEW



Local Impact.  
National Influence.

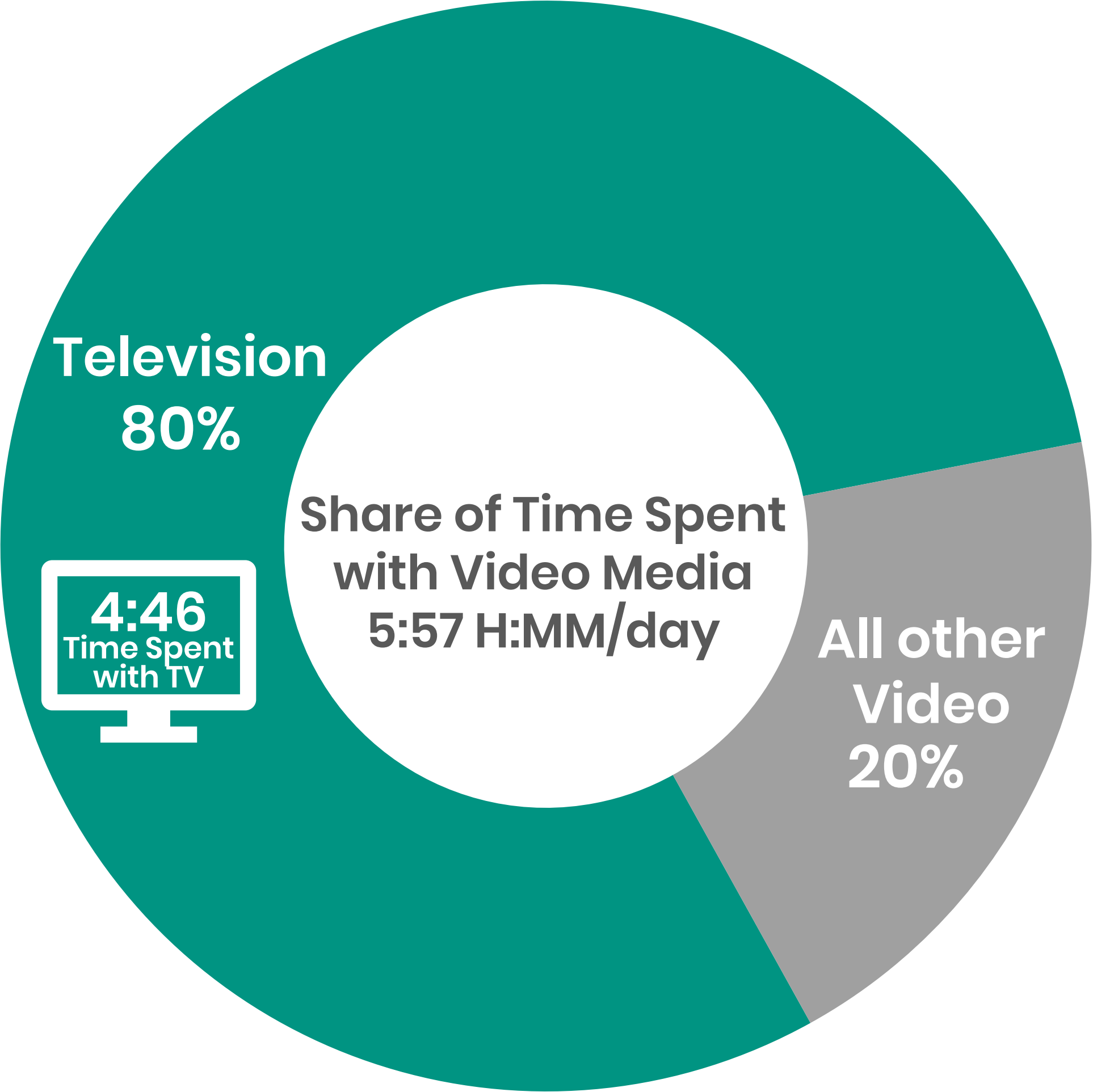
Brought to you by  
**KATZ TV CONTENT STRATEGY**

# CONTENT IS EVERYWHERE



Local Impact.  
National Influence.

# TELEVISION MAKES UP THE LION'S SHARE OF VIDEO MEDIA



Local Impact.  
National Influence.

All Other Video includes TV-Connected Devices (DVD, Game Console, Internet Connected Device); Video on Computer, Video Focused App/Web on Smartphone, Video Focused App/Web on Tablet

Source: Nielsen Total Audience Report Q1 2018. Chart based on Total U.S. Population 18+



# THE NEW FACES OF BROADCAST...FALL 2018



## AND SOME RETURNING ONES TOO!





# SOME OF BROADCAST'S TOP CONTENT COMPETITORS

NETFLIX

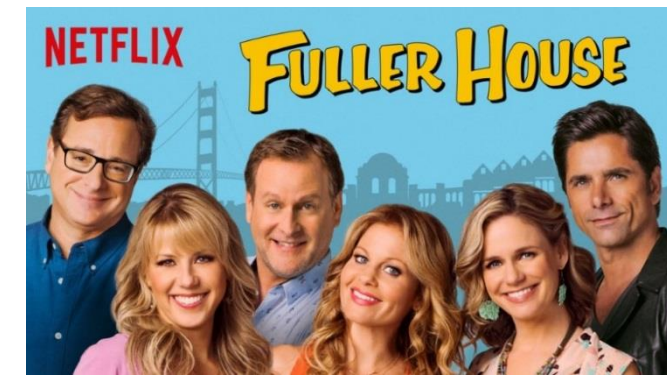


hulu



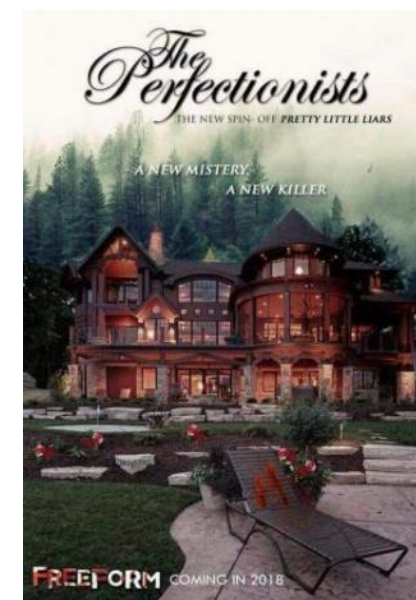


# NOTABLE NEW & RETURNING OTT SERIES





# NOTABLE NEW & RETURNING CABLE SERIES





# CONTENT – OTT & CABLE

Every day more and more content

Broadcast Network content creators defecting

Quantity of content does not mean quality

Critical, nomination-worthy successes

Alternative Programming



# THE BIG PICTURE

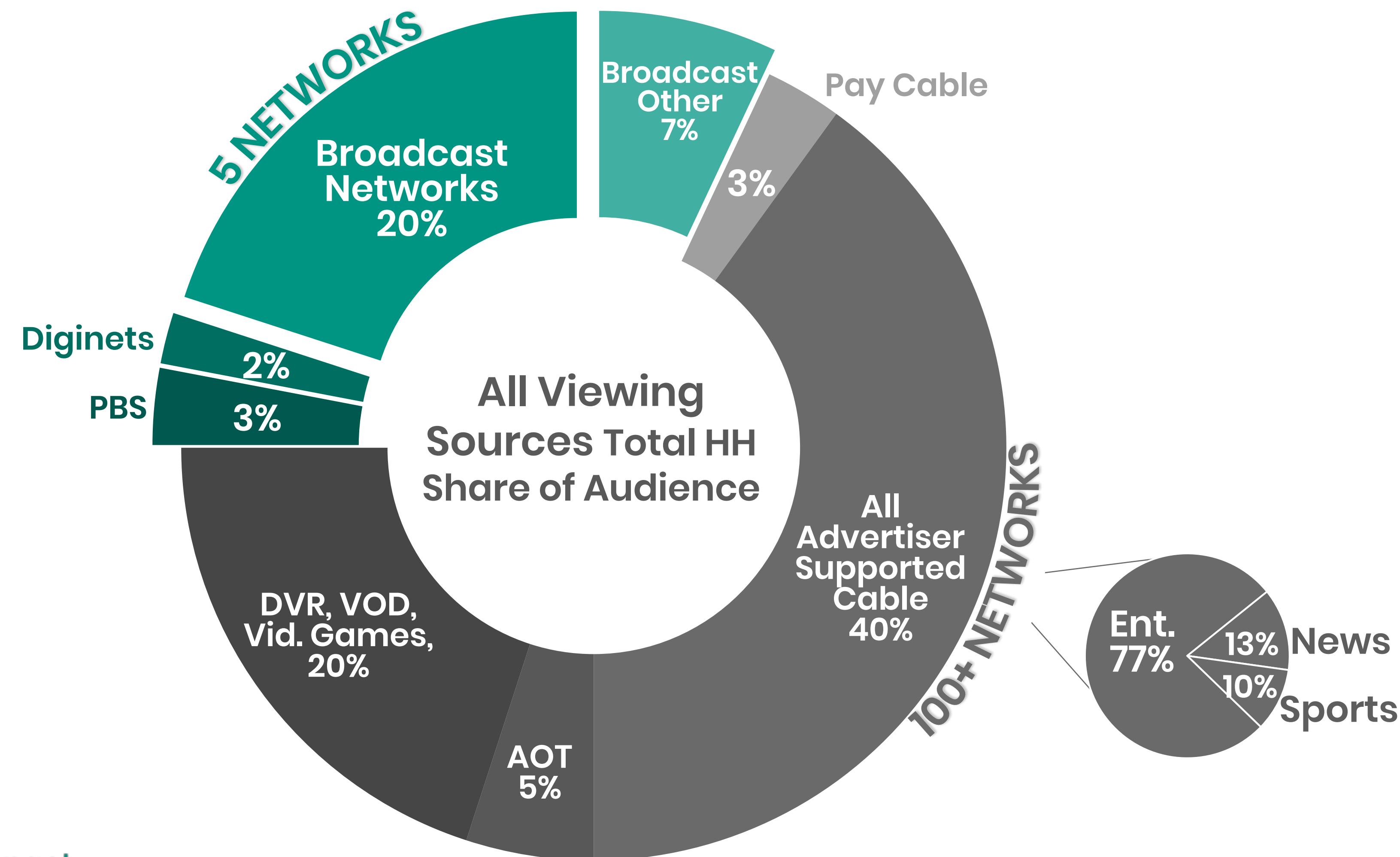
**A Look at the  
Performance of  
All Viewing Sources  
in Primetime**



Local Impact.  
National Influence.



# THE BIG PICTURE – PRIMETIME LANDSCAPE 2017/2018



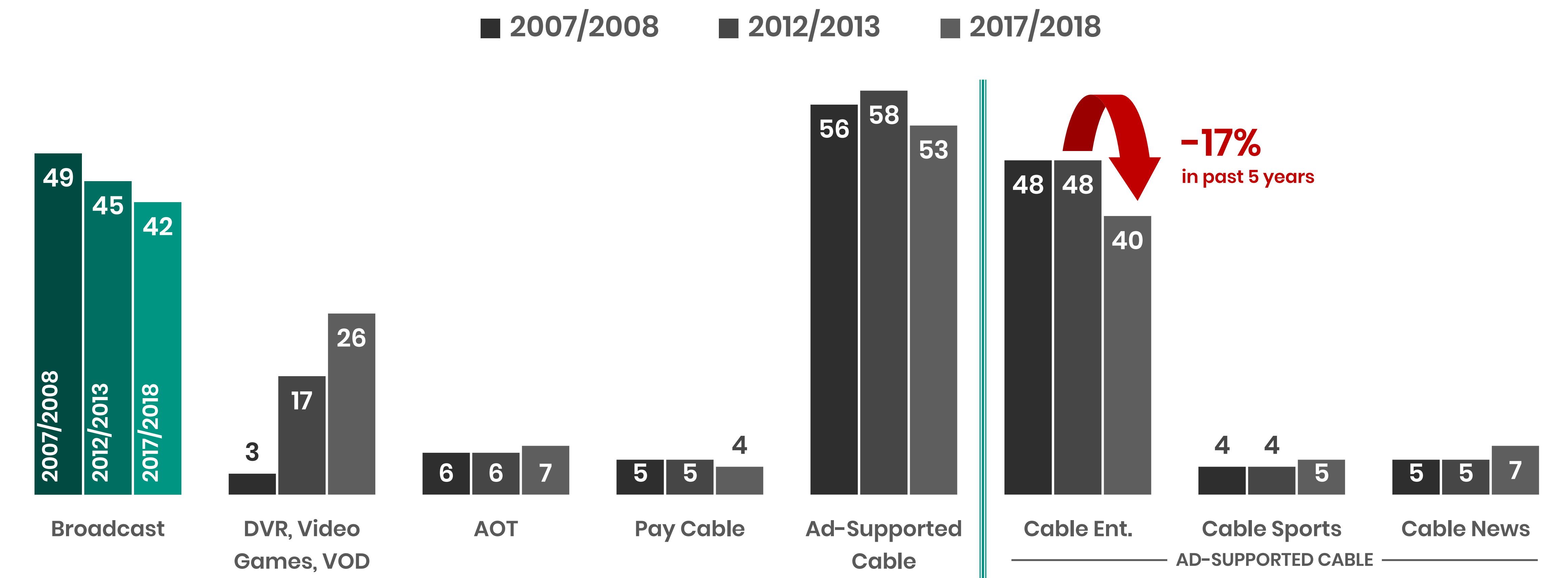
Local Impact.  
National Influence.

Note: Broadcast Networks=ABC, CBS, NBC, FOX, CW. Broadcast other = Azteca, Estrella, Ion, Telemundo, Univision, Unimas, Independent Broadcast. Diginets=Bounce TV, Cozi TV, Escape, Grit, Heroes & Icons, LAFF, Me TV and PBS

Source: Nielsen NNTV, 09/25/2017 – 05/23/2018, HH Shares, L+SD data.



# THE BIG PICTURE – PRIMETIME HH LANDSCAPE



Local Impact.  
National Influence.

Note: Broadcast=ABC, CBS, NBC, FOX, CW, Azteca, Estrella, Ion, Telemundo, Univision, Unimas, Independent Broadcast, Bounce TV, Cozi TV, Escape, Grit, Heroes & Icons, LAFF Me TV and PBS.

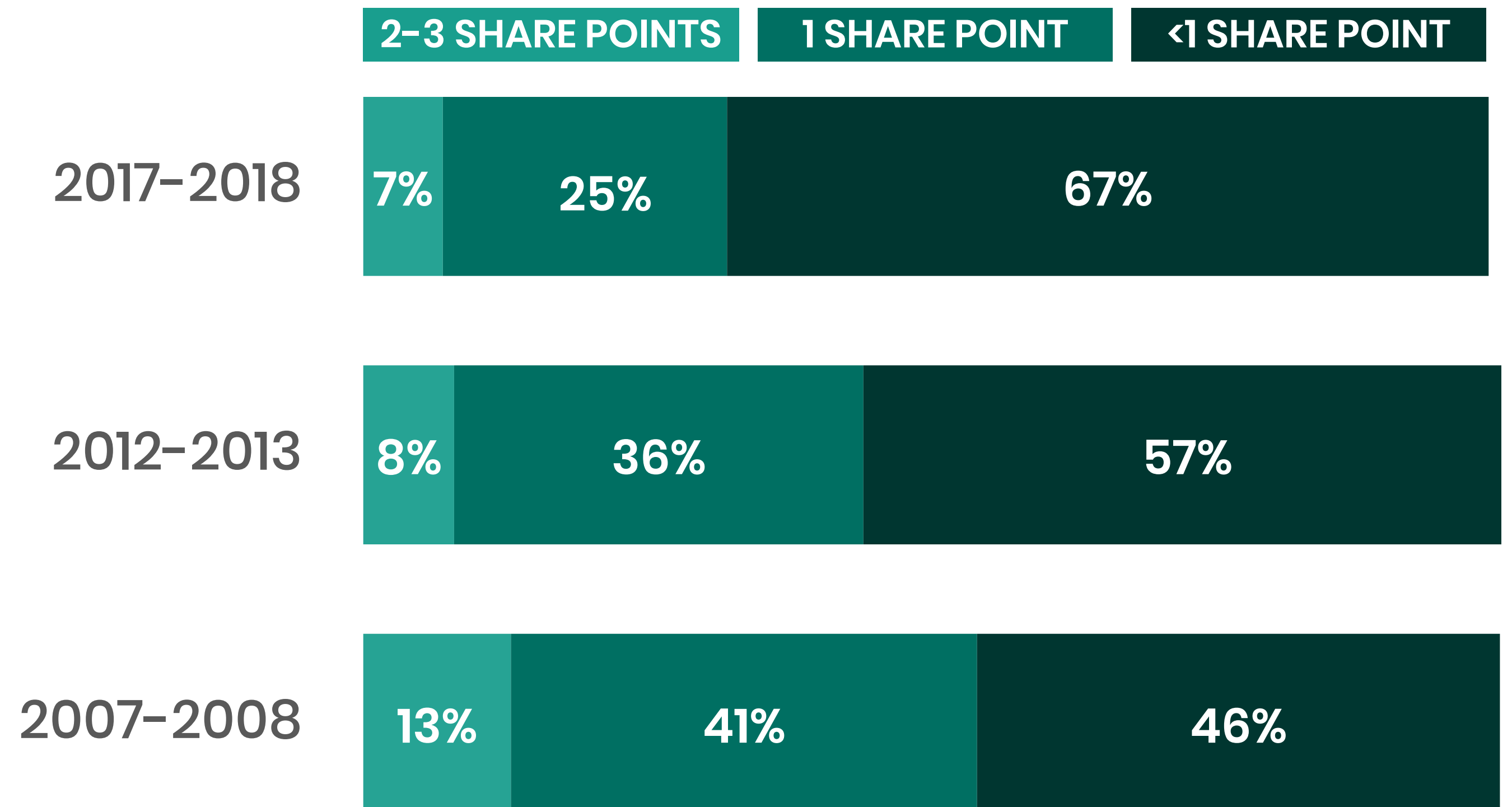
Source: Nielsen NNTV, 9/25/17-5/23/18, 9/24/12-5/22/13, 9/24/07-5/21/08.  
Total HH Shares, L+SD Data.



# LOOK CLOSER ...

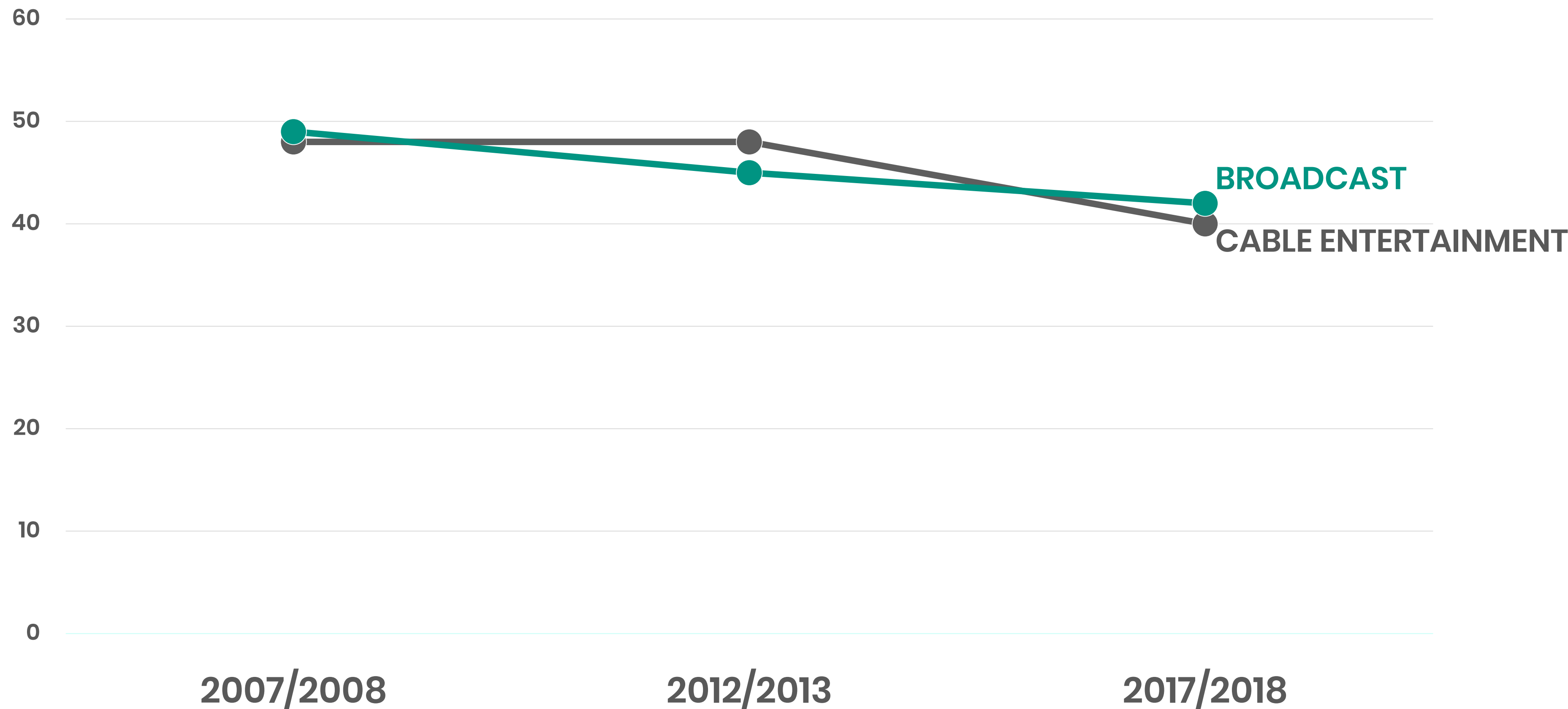
## Advertiser Supported Cable's HH Share Trend

Only 7% of 100 plus advertiser supported measured cable networks actually deliver a 2 or 3 HH share, while 67% do not even register a one share





# BROADCAST VS. CABLE ENTERTAINMENT CHANGE



Local Impact.  
National Influence.

Note: Broadcast=ABC, CBS, NBC, FOX, CW, Azteca, Estrella, Ion, Telemundo, Univision, Unimas, Independent Broadcast, Bounce TV, Cozi TV, Escape, Grit, Heroes & Icons, LAFF, Me TV and PBS.

Source: Nielsen NNTV, 9/25/17-5/23/18, 9/24/12-5/22/13, 9/24/07-5/21/08.  
Total HH Shares, L+SD Data.



# THE BIGGER PICTURE

**The Primetime  
Performance of  
Broadcast Networks  
ABC, CBS, NBC,  
FOX & The CW**

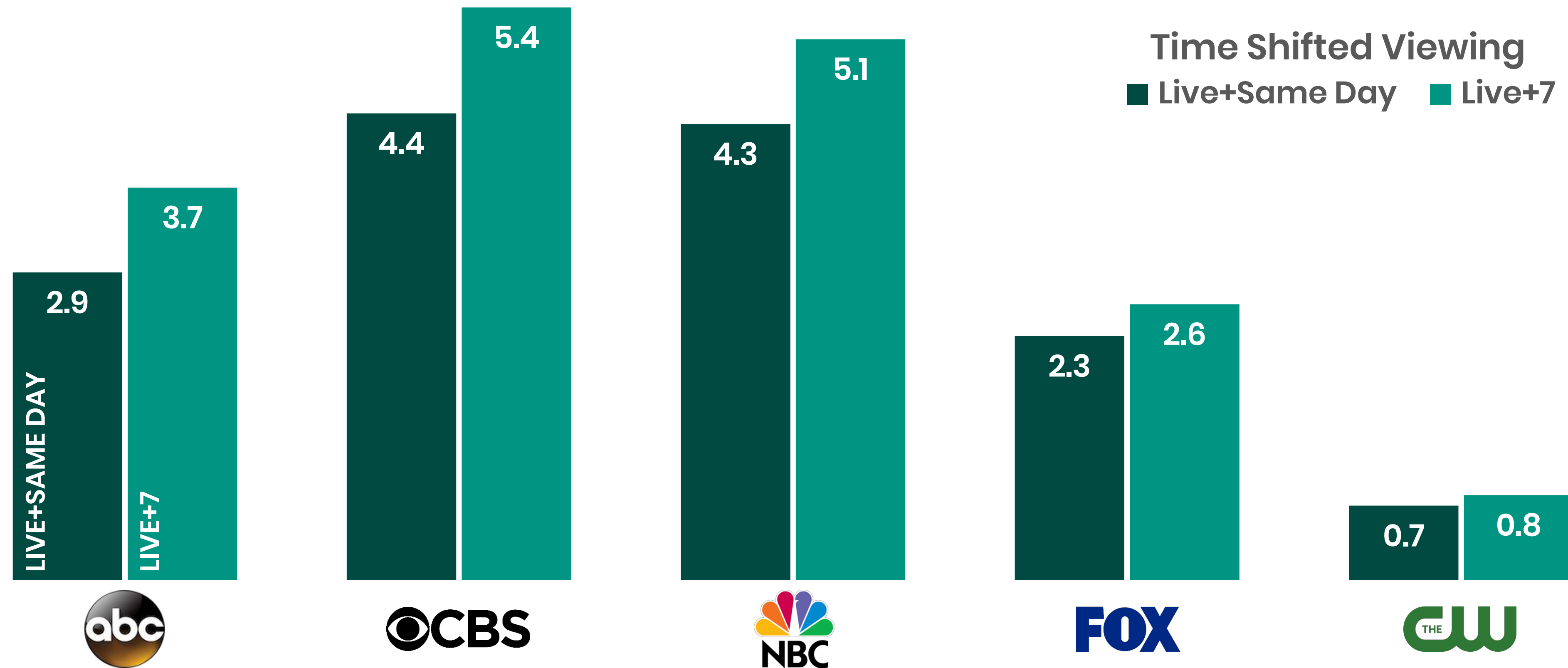


Local Impact.  
National Influence.



# PRIMETIME HH RATINGS PERFORMANCE – 2017/2018

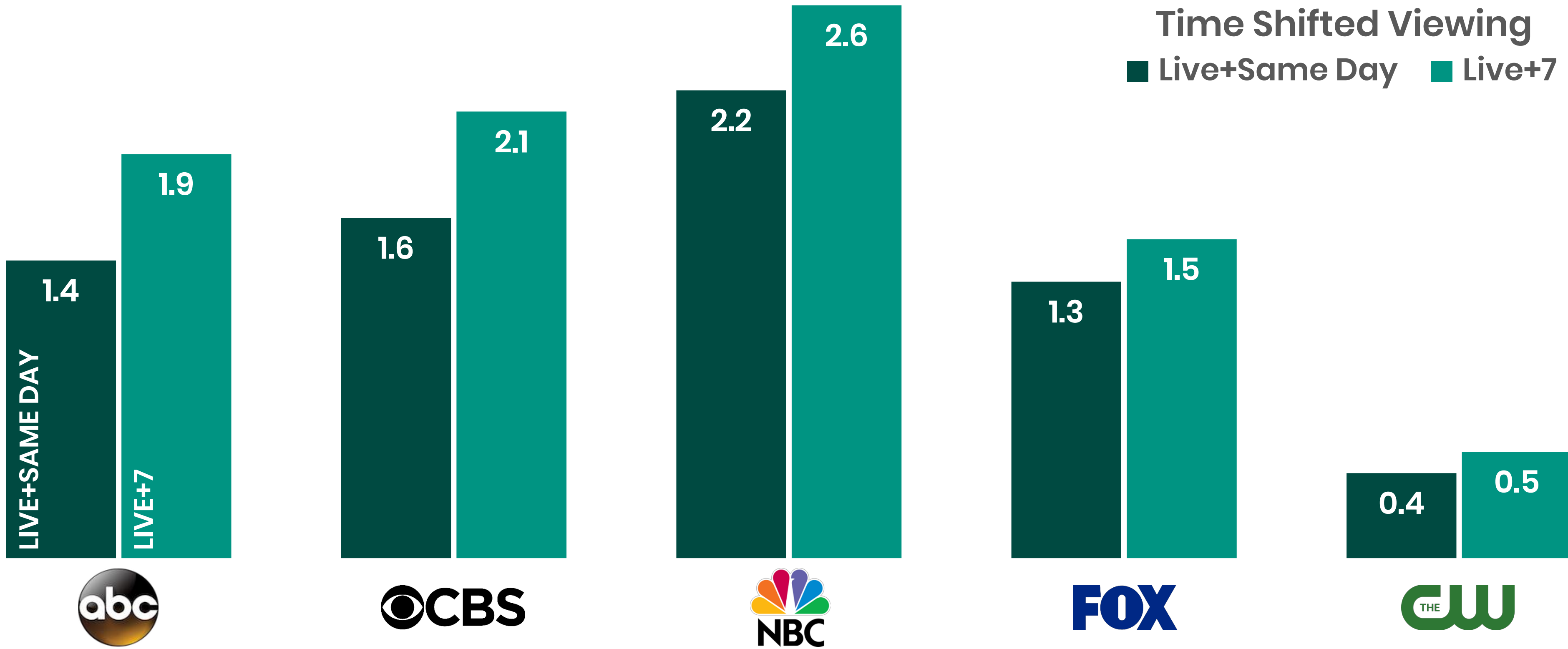
Broadcast Networks ABC, CBS, NBC, FOX & The CW





# PRIMETIME A25-54 RATINGS PERFORMANCE – 2017/2018

Broadcast Networks ABC, CBS, NBC, FOX & The CW





# TOP OF THE CHARTS –PROGRAM WINNERS

RNK	HH		RTG	SHR
1	ROSEANNE	ABC	11.3	21
1	BIG BANG THEORY, THE	CBS	11.3	20
3	THIS IS US	NBC	10.9	19
4	NCIS	CBS	10.5	18
5	SUN NIGHT FOOTBALL	NBC	10.2	18
6	GOOD DOCTOR, THE	ABC	9.9	19
7	YOUNG SHELDON	CBS	9.8	17
8	BULL	CBS	9.0	16
9	CBS+NFLN THU NT FTBLL	CBS	8.6	16
10	BLUE BLOODS	CBS	8.4	17
11	NBC+NFLN THU NT FTBLL	NBC	8.2	15
12	NCIS: NEW ORLEANS	CBS	8.0	15
13	GREY'S ANATOMY	ABC	7.4	13
14	VOICE-MON	NBC	7.2	12
15	60 MINUTES	CBS	7.1	13
15	DANCING W/THE STARS	ABC	7.1	12
17	HAWAII FIVE-0	CBS	6.9	13
17	VOICE-TUE	NBC	6.9	12
19	MOM	CBS	6.8	12
20	CHICAGO MED	NBC	6.7	13
20	CHICAGO PD	NBC	6.7	13
20	NCIS: LOS ANGELES	CBS	6.7	12
23	911	FOX	6.5	12
23	OT, THE	FOX	6.5	13
25	CHICAGO FIRE	NBC	6.4	12
	NFL REGULAR SEASON-L	ESPN	6.4	12
	WALKING DEAD	AMC	6.1	11
	Local Impact.			
	National Influence.			

RNK	A25-54		RTG	SHR
1	ROSEANNE	ABC	7.1	25
2	SUN NIGHT FOOTBALL	NBC	6.8	20
3	THIS IS US	NBC	6.6	19
4	BIG BANG THEORY, THE	CBS	6.3	21
	WALKING DEAD	AMC	5.6	16
5	CBS+NFLN THU NT FTBLL	CBS	5.3	17
6	YOUNG SHELDON	CBS	4.9	16
6	NBC+NFLN THU NT FTBLL	NBC	4.9	16
8	OT, THE	FOX	4.4	15
9	GOOD DOCTOR, THE	ABC	4.3	14
	NFL REGULAR SEASON-L	ESPN	4.1	13
10	GREY'S ANATOMY	ABC	3.9	13
11	911	FOX	3.8	12
12	WILL & GRACE	NBC	3.7	11
12	FOOTBALL NT-AM PT 3	NBC	3.7	11
14	VOICE	NBC	3.4	10
15	NCIS	CBS	3.3	11
15	SURVIVOR	CBS	3.3	11
17	MOM	CBS	3.2	10
18	EMPIRE	FOX	3.1	11
18	VOICE-TUE	NBC	3.1	10
20	ELLENS GAME OF GAMES	NBC	3.0	9
20	MODERN FAMILY	ABC	3.0	9
22	BULL	CBS	2.9	9
22	CHICAGO PD	NBC	2.9	10
24	AMERICAN IDOL-SUN	ABC	2.8	9
24	CRIMINAL MINDS	CBS	2.8	9
24	CHICAGO MED	NBC	2.8	9
24	LAW AND ORDER:SVU	NBC	2.8	9
24	CHICAGO FIRE	NBC	2.8	9

Source: Nielsen NNTV, 9/25/17-5/23/18, HH & A25-54, L+7 Data.

# PRIMETIME TOP 10 HH NETWORK SCRIPTED PROGRAMS

Time Shifted Viewing – 2017/2018

	HH Rtg L+SD	HH Rtg L+7	%Diff	Rtg Point Diff
ROSEANNE	7.7	11.3	47%	+3.6
BIG BANG	8.4	11.3	35%	+2.9
THIS IS US	6.9	10.9	58%	+4.0
NCIS	8.0	10.5	31%	+2.5
GOOD DOCTOR	6.0	9.9	65%	+3.9
YOUNG SHELDON	7.5	9.8	31%	+2.3
BULL	6.6	9.0	36%	+2.4
BLUE BLOODS	5.7	8.4	47%	+2.7
NCIS: NOLA	5.6	8.0	43%	+2.4
GREY'S ANATOMY	5.0	7.4	48%	+2.4



# PRIMETIME TOP 10 A25-54 NETWORK PROGRAMS

Time Shifted Viewing – 2017/2018

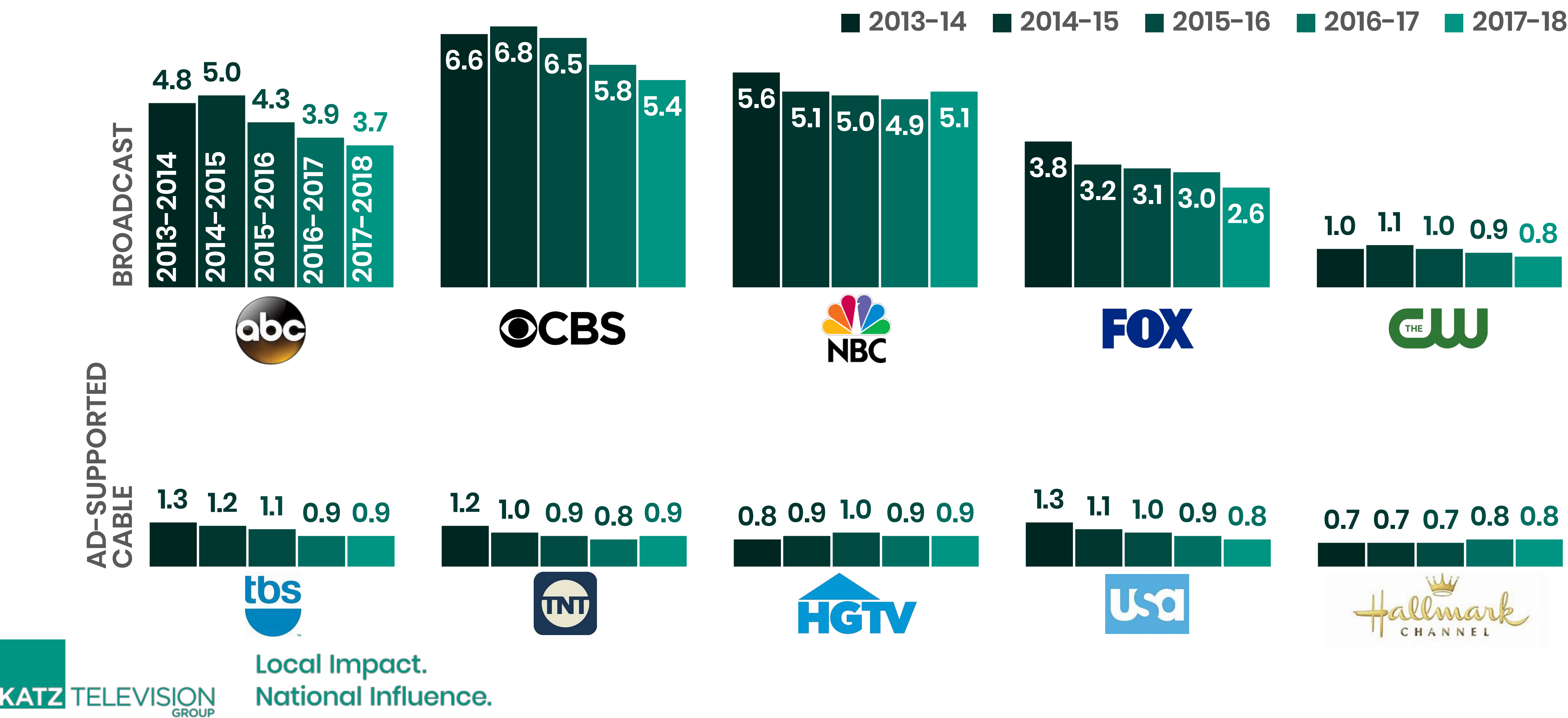
	A25-54 Rtg L+SD	A25-54 Rtg L+7	%Diff	Rtg Point Diff
ROSEANNE	4.5	7.1	58%	+2.6
THIS IS US	3.8	6.6	74%	+2.8
BIG BANG	4.1	6.3	54%	+2.2
YOUNG SHELDON	3.4	4.9	44%	+1.5
GOOD DOCTOR	2.2	4.3	95%	+2.1
GREY'S ANATOMY	2.3	3.9	70%	+1.6
9-1-1	2.1	3.8	81%	+1.7
WILL & GRACE	2.0	3.7	85%	+1.7
NCIS	2.2	3.3	50%	+1.1
MOM	2.3	3.2	39%	+0.9



Local Impact.  
National Influence.

# PRIMETIME PERFORMANCE

## Five-Year HH Ratings Trend – Broadcast and Top 5 Ad-Supported Cable Entertainment Networks

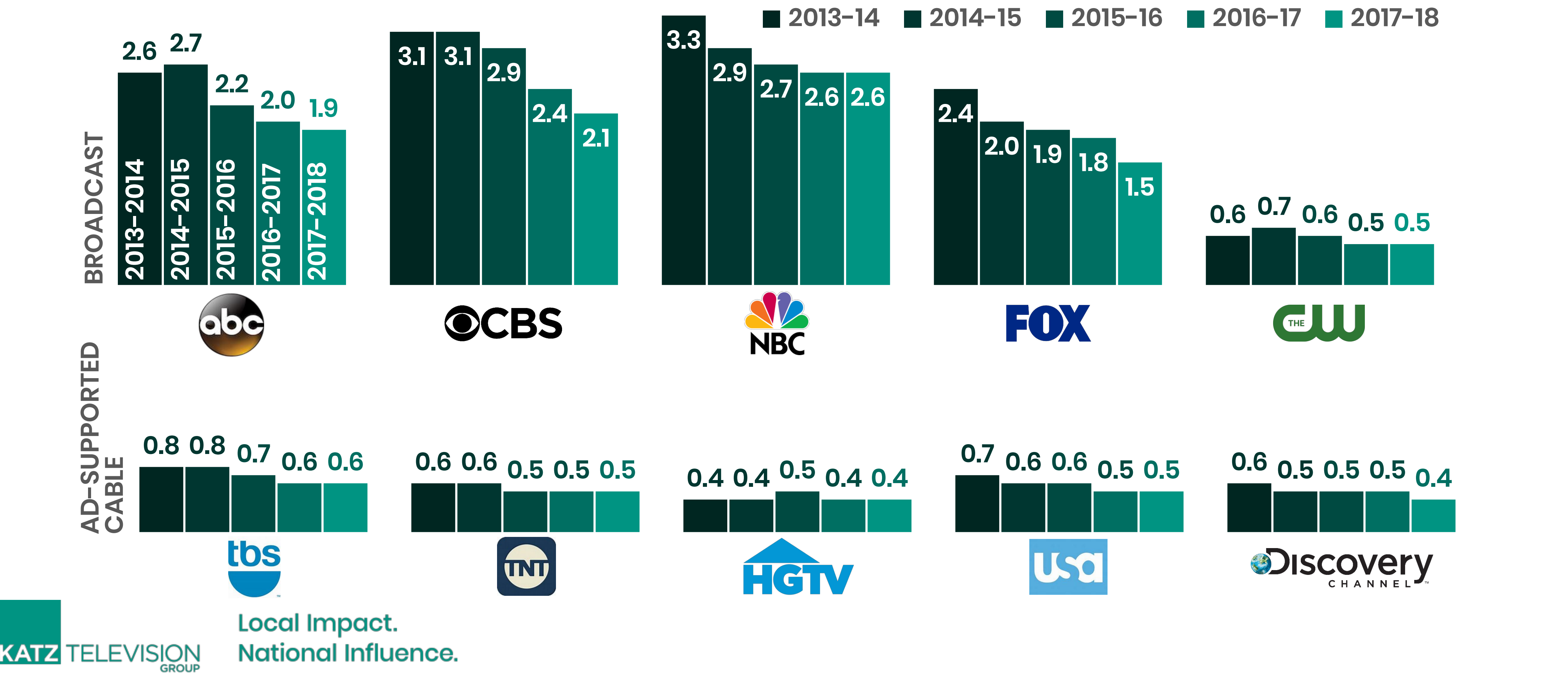


Source: Nielsen NNTV, 9/25/17 – 5/23/2018, 9/19/16 – 5/24/17, 9/21/15 – 5/25/16, 9/22/14 – 5/20/15, 9/23/13 – 5/21/14, HH Ratings, L+7 Data.  
Based on Cable Primetime M–Su 8–11PM.



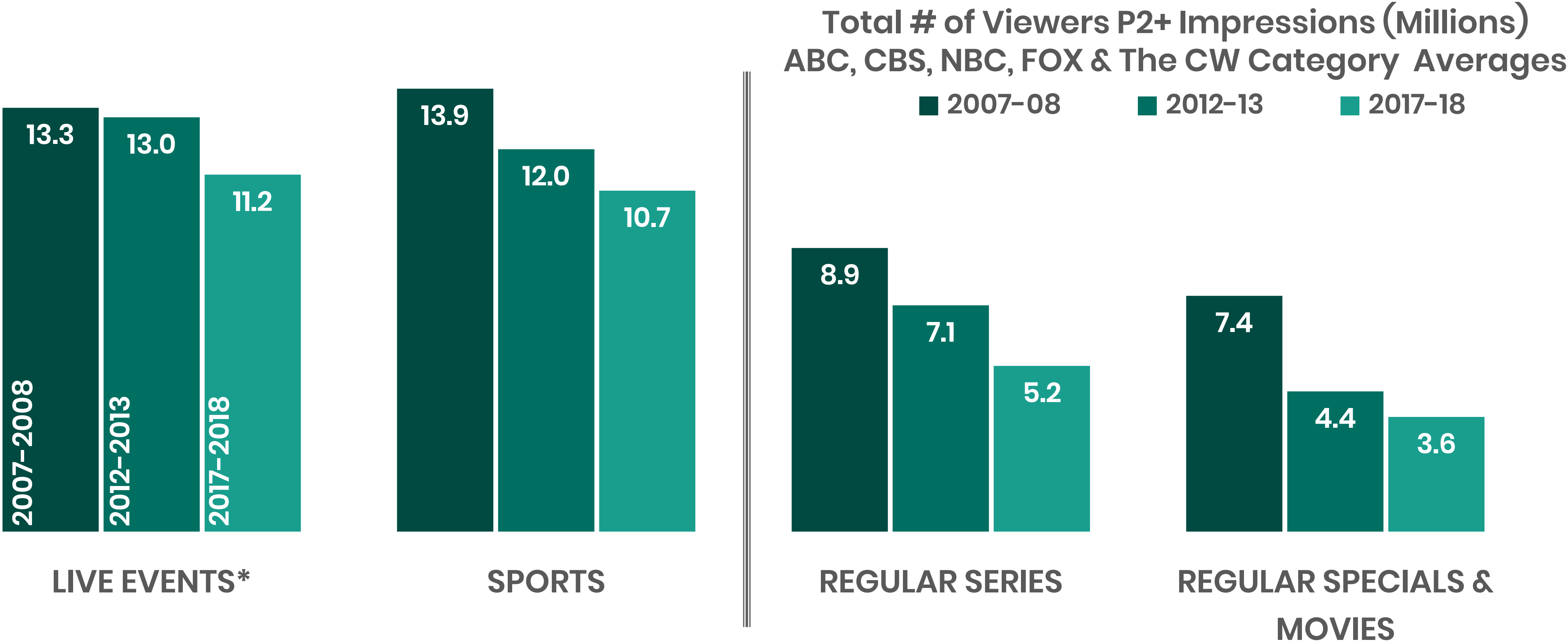
# PRIMETIME PERFORMANCE

## Five-Year A25-54 Ratings Trend – Broadcast and Top 5 Ad-Supported Entertainment Cable Networks



Source: Nielsen NNTV, 9/25/17 - 5/23/2018, 9/19/16 - 5/24/17, 9/21/15 - 5/25/16, 9/22/14 - 5/20/15, 9/23/13 - 5/21/14, A25-54 Ratings, L+7 Data. Based on Cable Primetime M-Su 8-11PM

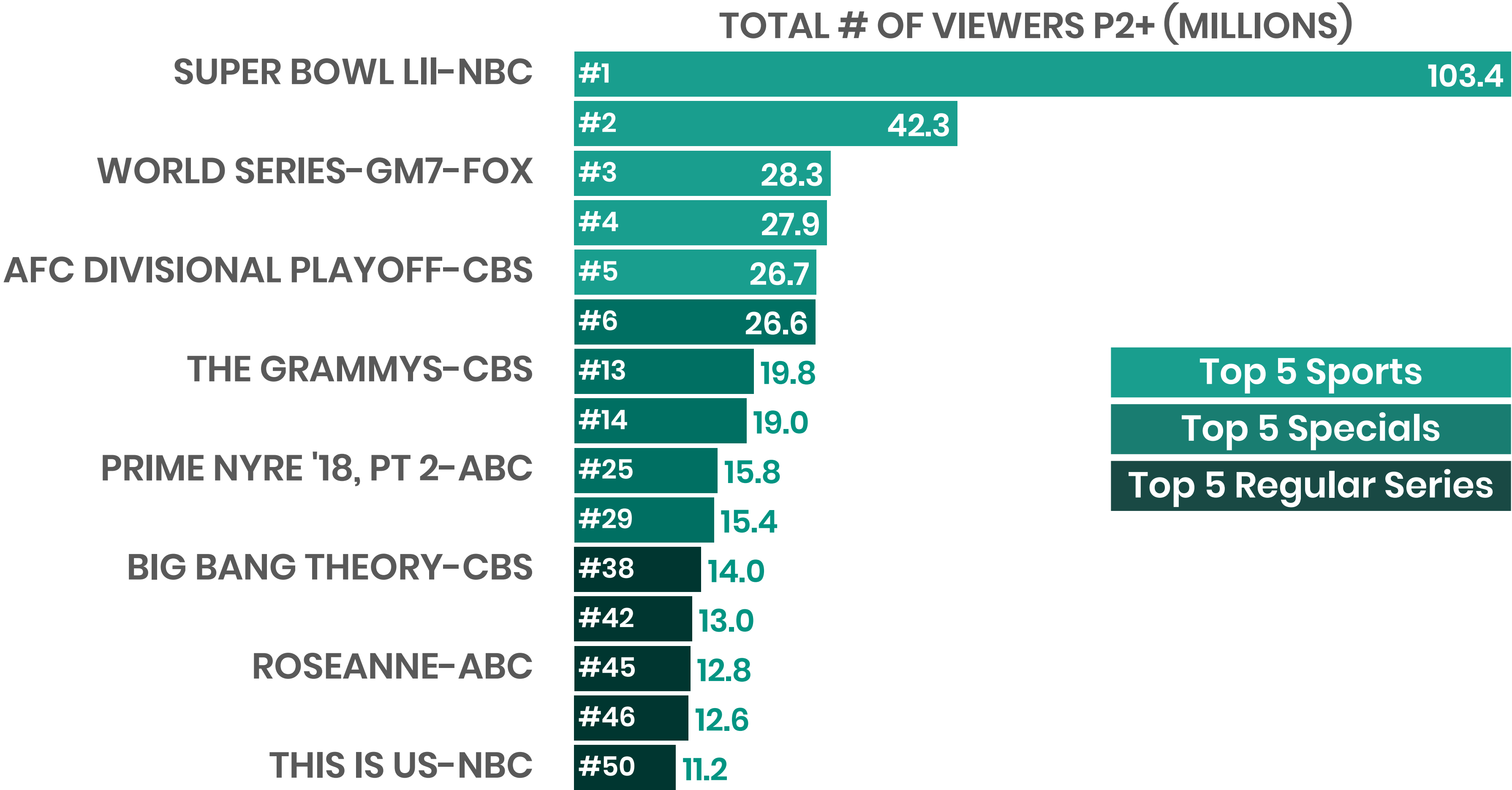
# THE POWER OF LIVE IN PRIMETIME OVER THE YEARS



Source: Nielsen NNTV, 9/25/17 - 5/23/18, 9/19/16 - 5/24/17, 9/21/15 - 5/25/16, 9/22/14 - 5/20/15, 9/23/13 - 5/21/14, P2+ Impressions, L+SD Data.  
\*For Live Events added one week before the new season to include the Emmy Awards. Note: The Sports section includes the Super Bowl, but excludes the Olympics.



# THE POWER OF LIVE IN PRIMETIME – 2017/18



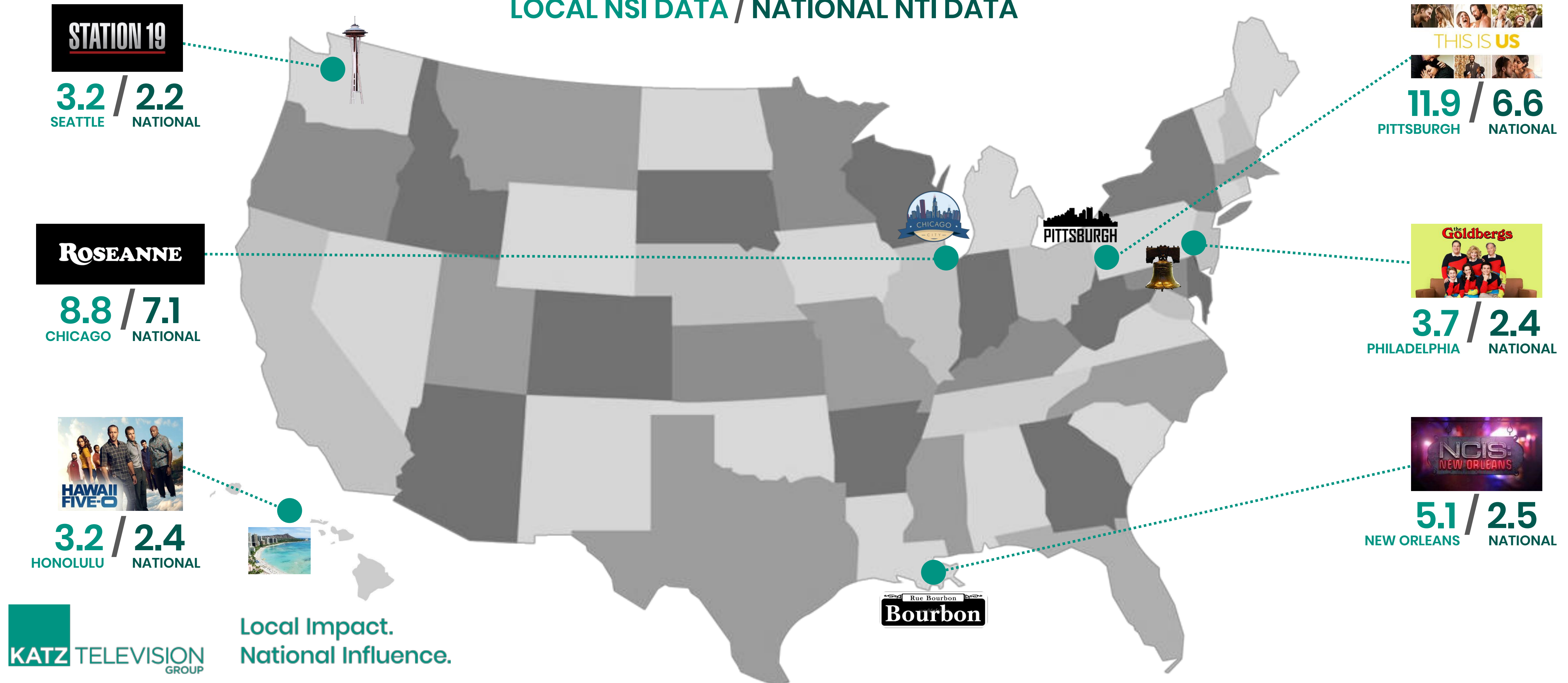
Local Impact.  
National Influence.

Note: Ranked Among ALL Programs for the Season

Source: Nielsen NNTV, 9/25/17 – 5/23/18, P2+ Impressions, L+SD Data. Ranking based on all programs that ran in the 2017-18 season.

# LOCAL SETTINGS CAN DRIVE LOCAL RATINGS: A25-54

LOCAL NSI DATA / NATIONAL NTI DATA



Source: Nielsen NNTV, NTI Data, 09/25/2017 - 05/23/2018,  
NSI WRAP Sweeps, Nov 2017, Feb 2018, May 2018, L+7 DMA Data, A25-54



# NETWORK SCHEDULE STABILITY

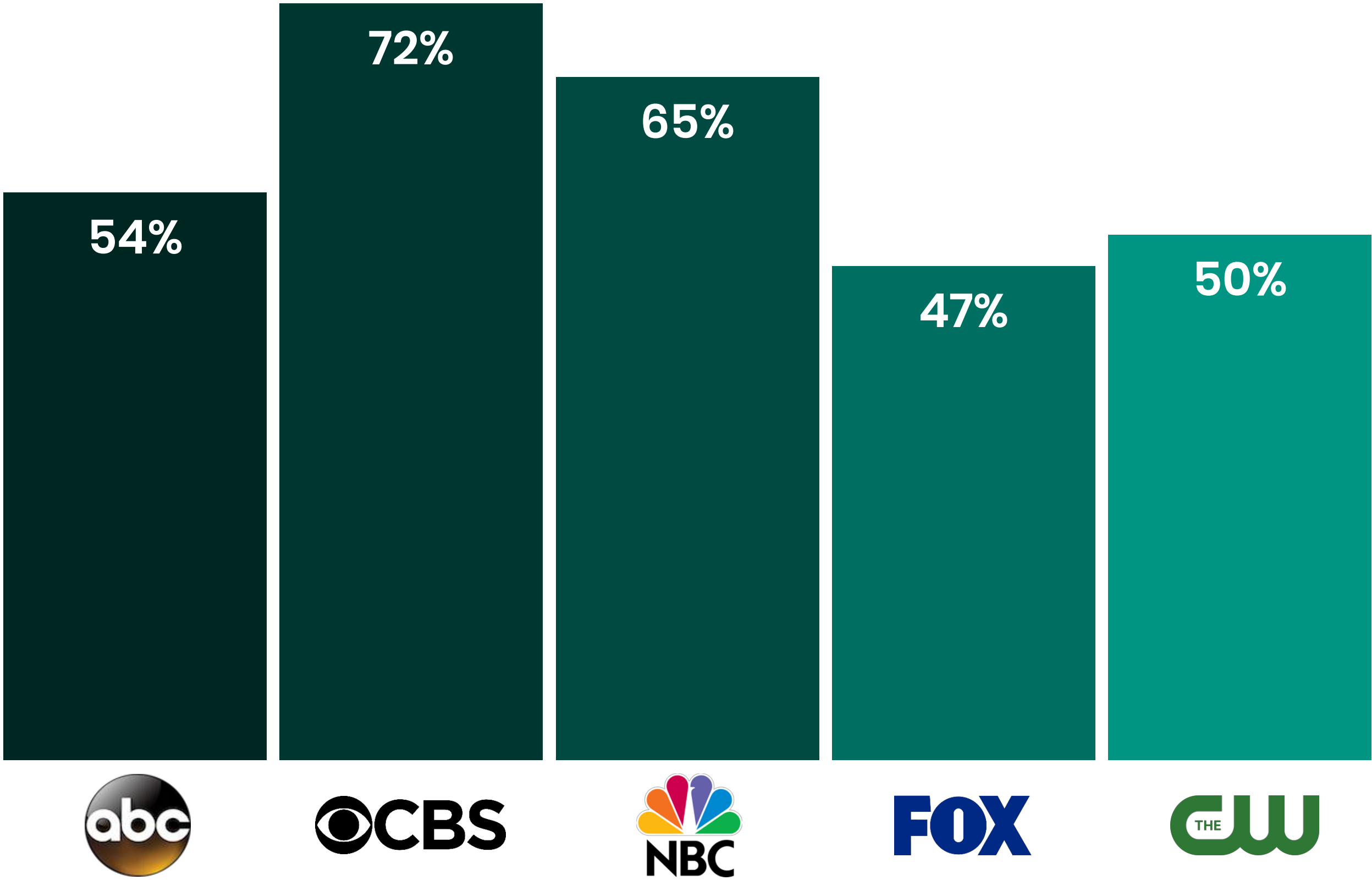
Fall 2018



Local Impact.  
National Influence.

# NETWORK SCHEDULE STABILITY – FALL 2018

Returning Series–Same Time Period



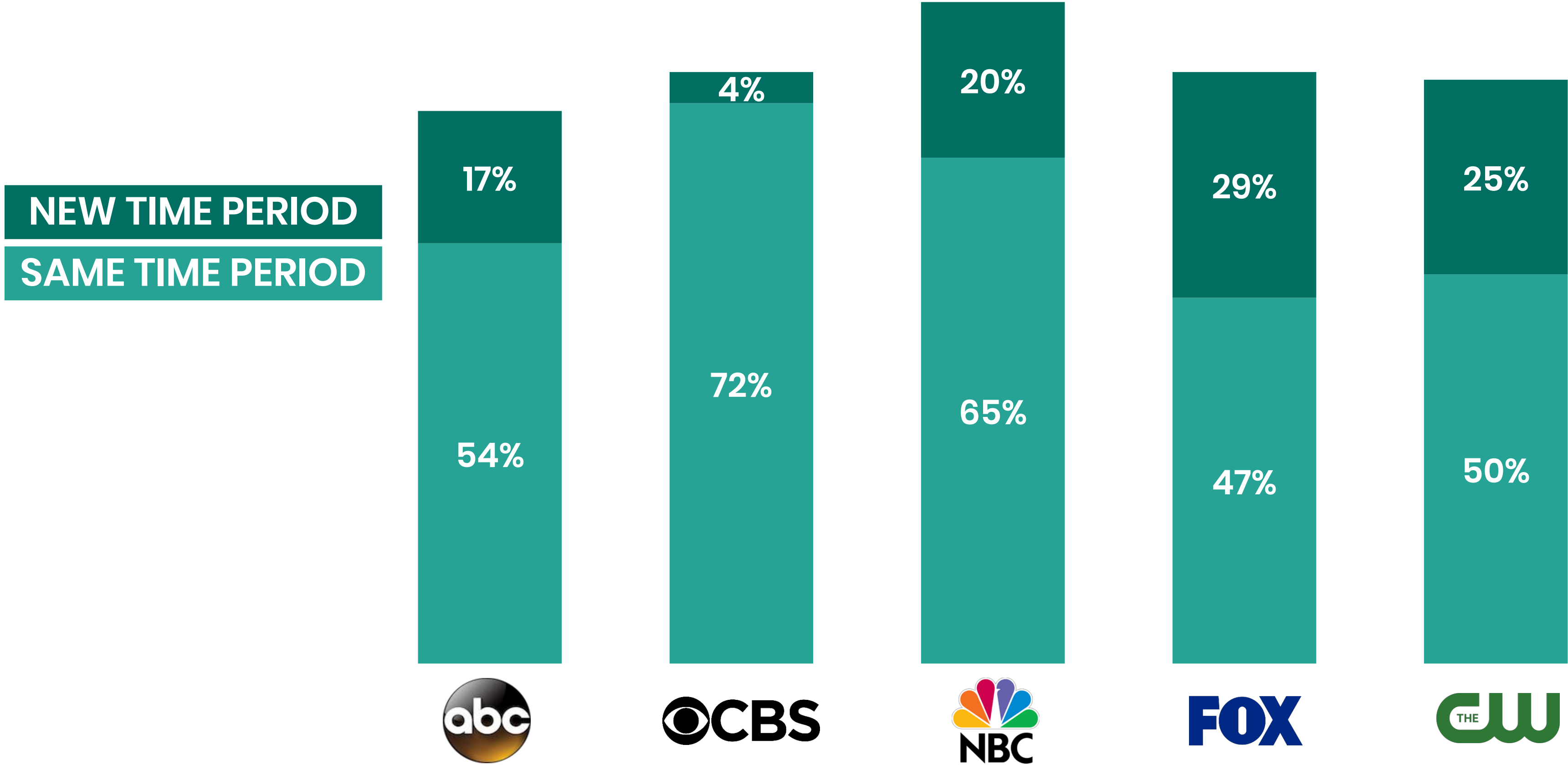
Local Impact.  
National Influence.

Source: Katz Internal Report based on Fall 2018 Network Primetime schedules.



# NETWORK SCHEDULE STABILITY – FALL 2018

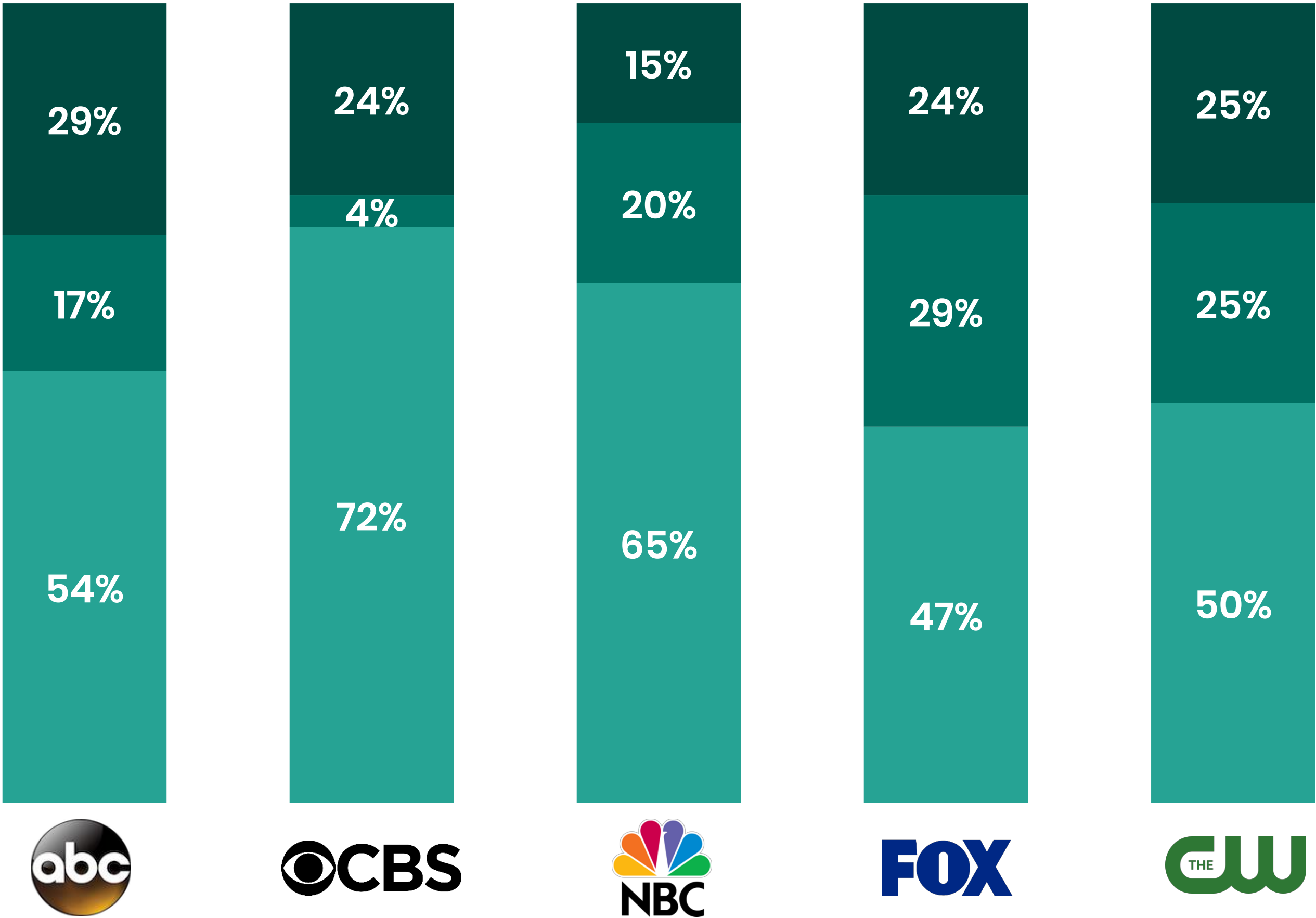
Returning Series – New Time Period + Same Time Period



# NETWORK SCHEDULE STABILITY – FALL 2018

## New Series Percentage

NEW SHOWS  
RETURNING – NEW TIME PERIOD  
RETURNING – SAME TIME PERIOD

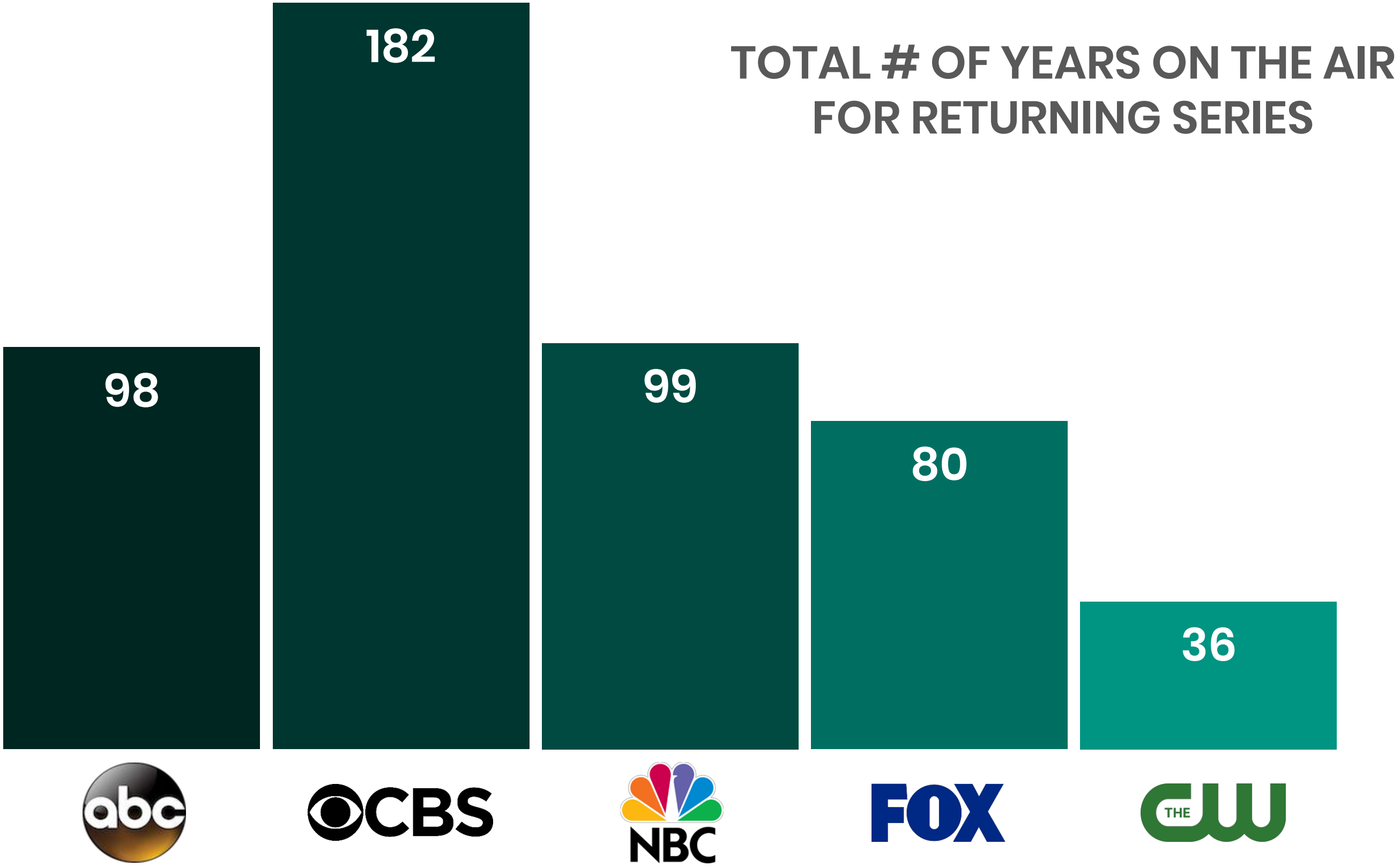


Local Impact.  
National Influence.

Source: Katz Internal Report based on Fall 2018 Network Primetime schedules.

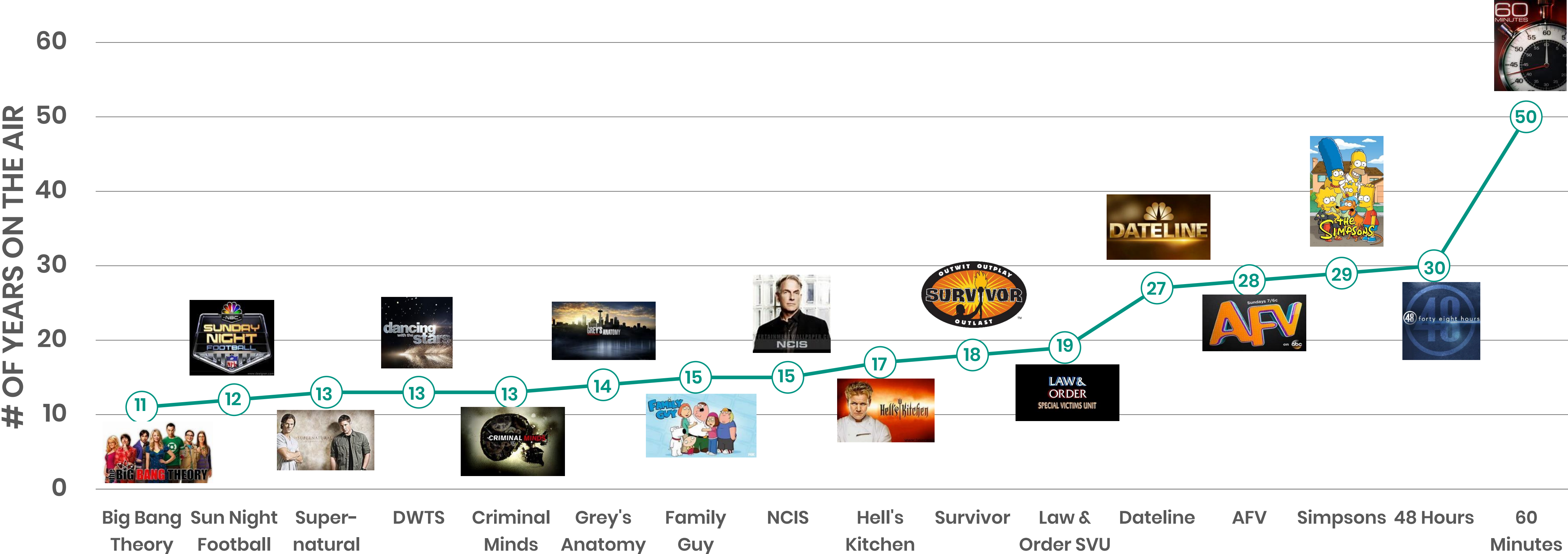


# NETWORK SERIES LONGEVITY



# TV SERIES STANDING THE TEST OF TIME

With More Than 10 Years on the Air



Local Impact.  
National Influence.






## % OF RETURNING FALL 2018 PROGRAMS OVER 10 YEARS ON AIR



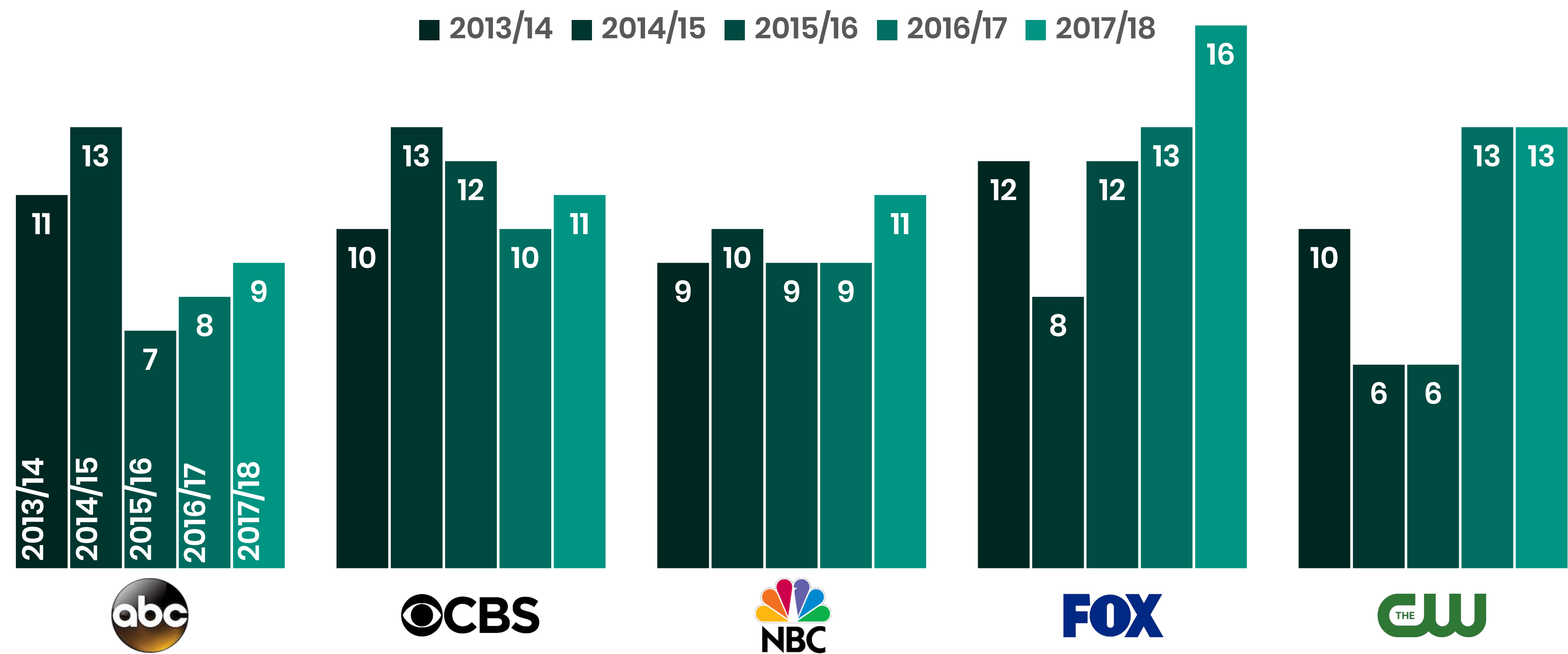
Source: Katz Internal Report based on Fall 2018 Network Primetime schedules.



# SUCCESS RATE OF NEW SERIES – 2017–18 SEASON

	NEW	CANCELED	SUCCESS RATE
	16	7	56%
	8	4	50%
	9	3	67%
	8	2	75%
	4	2	50%

# AVERAGE # OF EPISODES AIRED BEFORE CANCELLATION



Local Impact.  
National Influence.

Source: Katz Internal Report based on Nielsen NNTV episode ranking, 9/25/17-5/23/18, 9/19/16-5/24/17, 9/21/15-5/25/16, 9/22/14-5/20/15, 9/23/13-5/21/14.



# PROGRAMMING TRENDS

Fall 2018 and Beyond

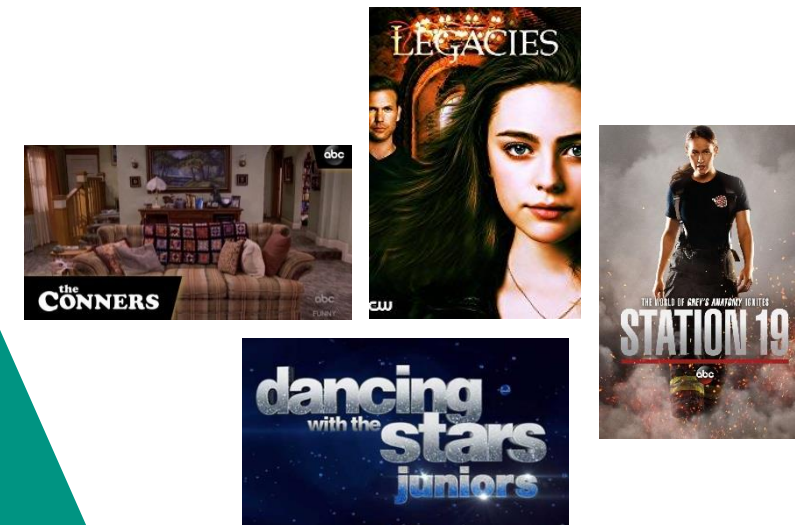


Local Impact.  
National Influence.

# SPOTLIGHT TREND #1

Relying on the tried and true, these trends are not new, but are in the spotlight

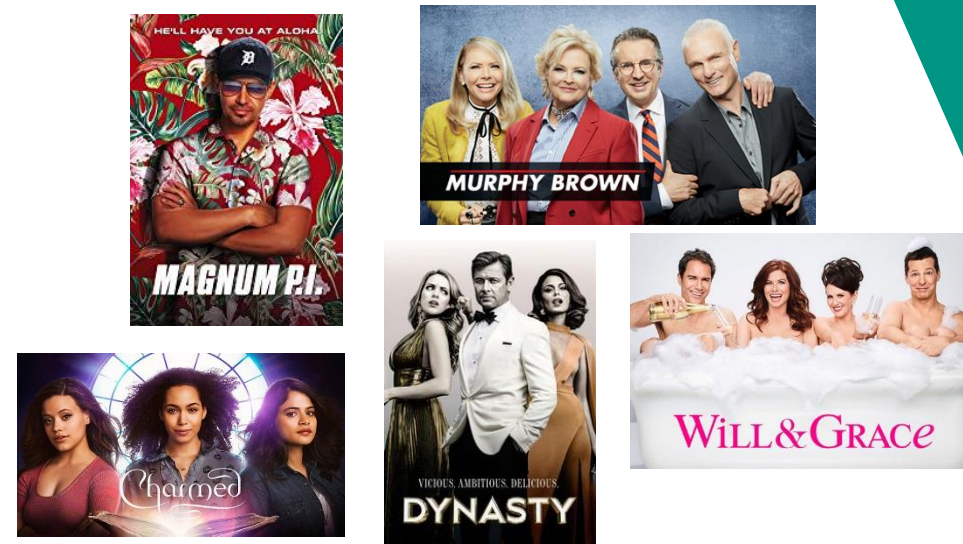
REBOOTS



NETWORK  
SWAPS



SPIN-OFFS



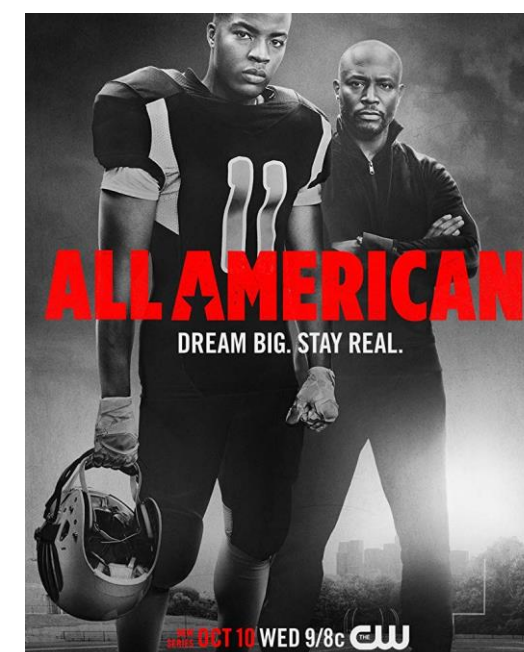
PREQUELS





# SPOTLIGHT TREND #2

Storytelling that adds more diversity and inclusion into the freshman mix





# SPOTLIGHT TREND #3

#Social Media playing a part in series survival

NETWORKS  
ARE  
LISTENING

Social Media  
gives networks  
something to  
think about

Can impact  
*saving* a show...

Or *canceled*  
a show...



# GENRE BREAKOUTS

Fall 2018

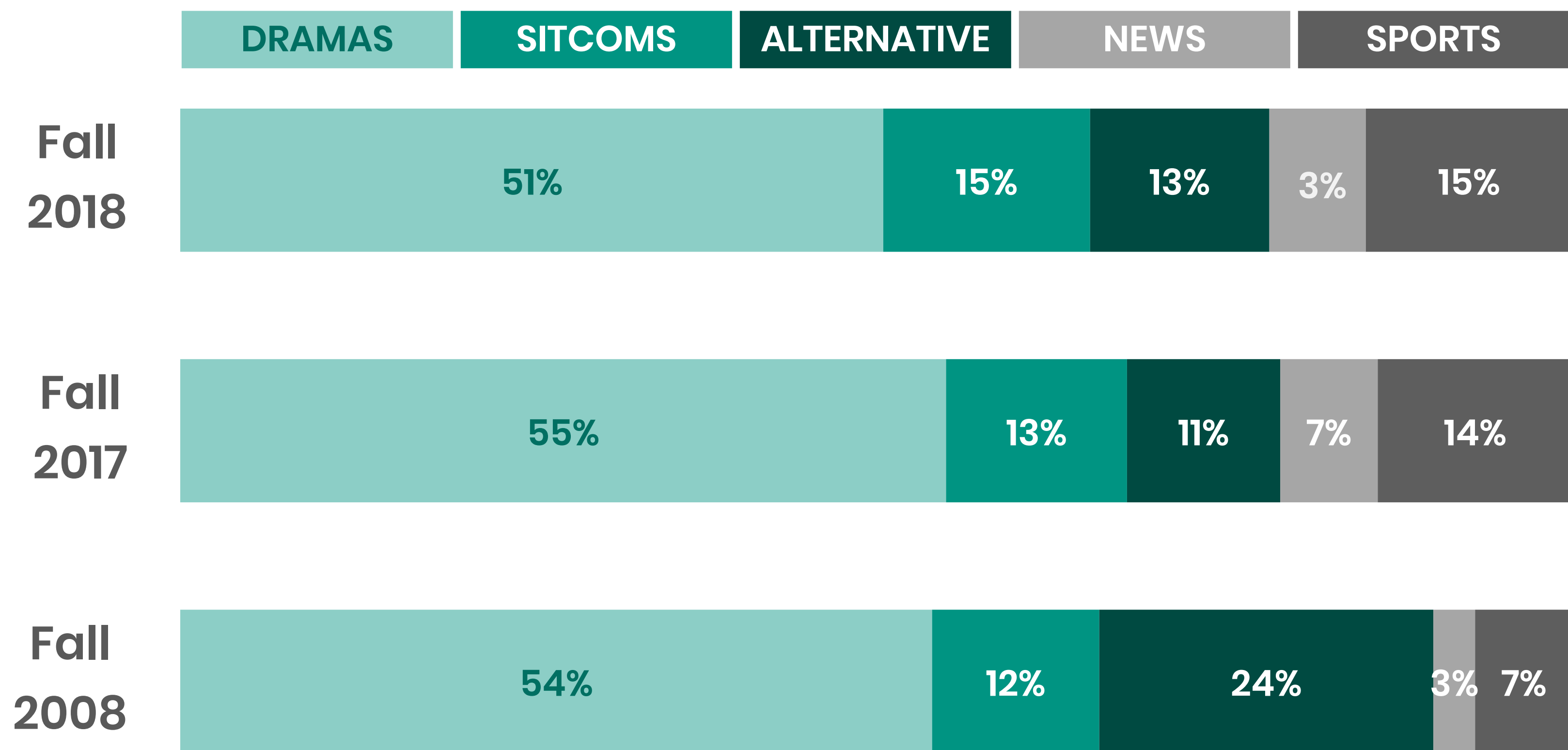


Local Impact.  
National Influence.



# GENRE TREND – FALL 2008 TO FALL 2018

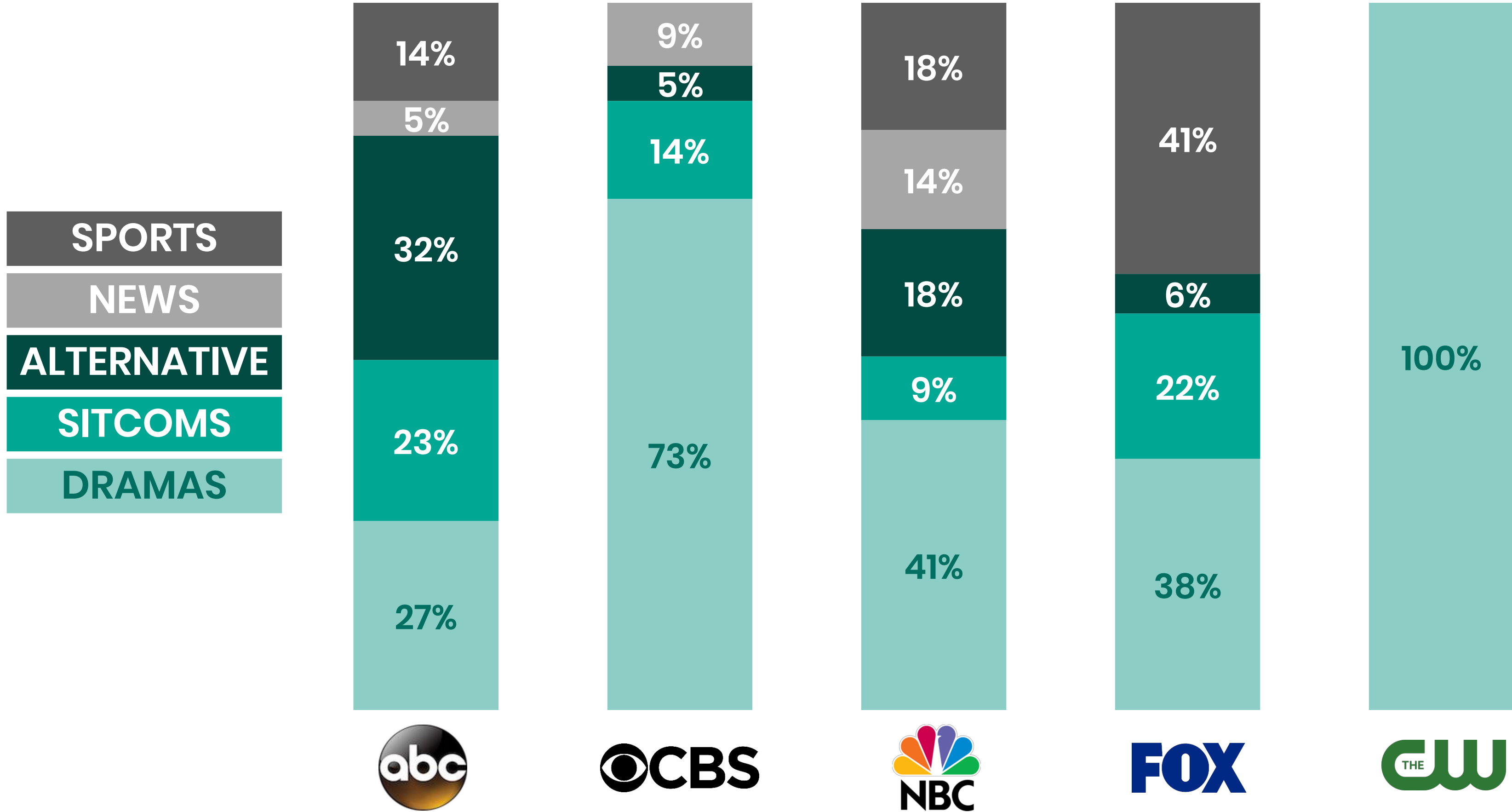
Across ABC, CBS, NBC, FOX & The CW



Local Impact.  
National Influence.

Based upon the Network’s schedule half-hour distribution for each Fall. The News category also includes TRUE CRIME. Alternative=Reality, Game Show, Competition, Video, Talk.

# LEADING GENRES FOR FALL 2018

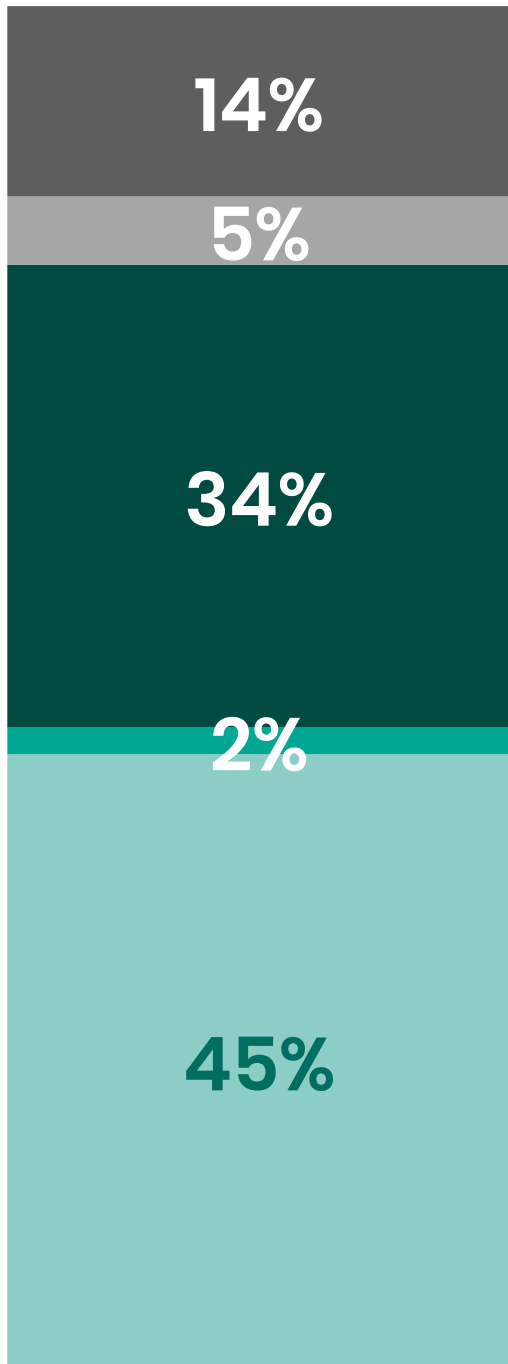


Local Impact.  
National Influence.

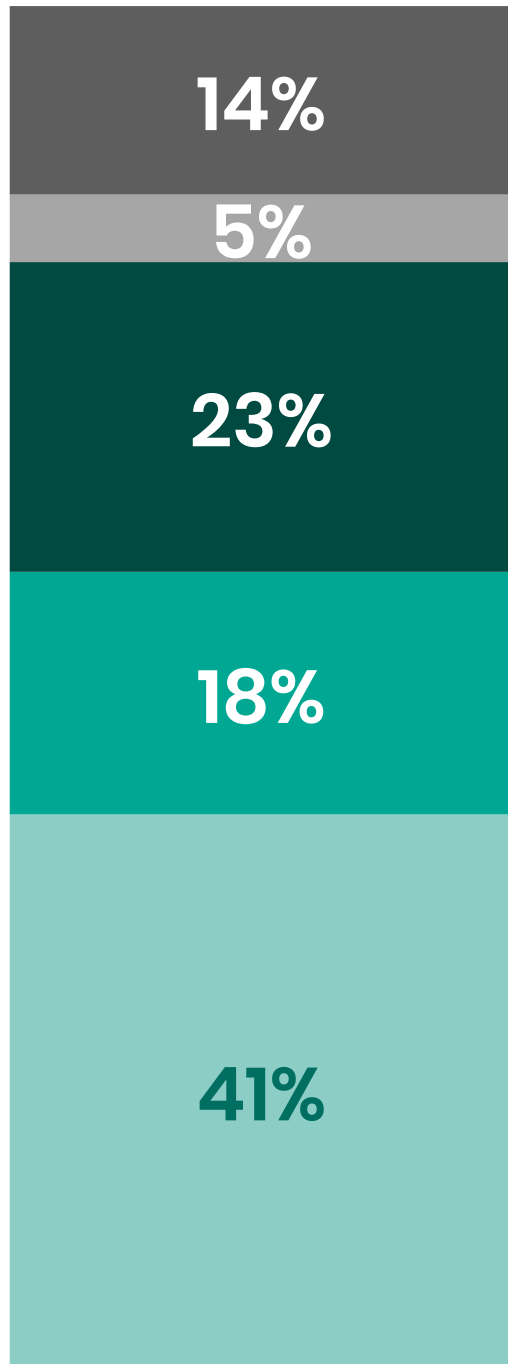
Based upon the Network's schedule half-hour distribution for Fall 2008. The News category also includes TRUE CRIME. Alternative=Reality, Game Show, Competition, Video, Talk.



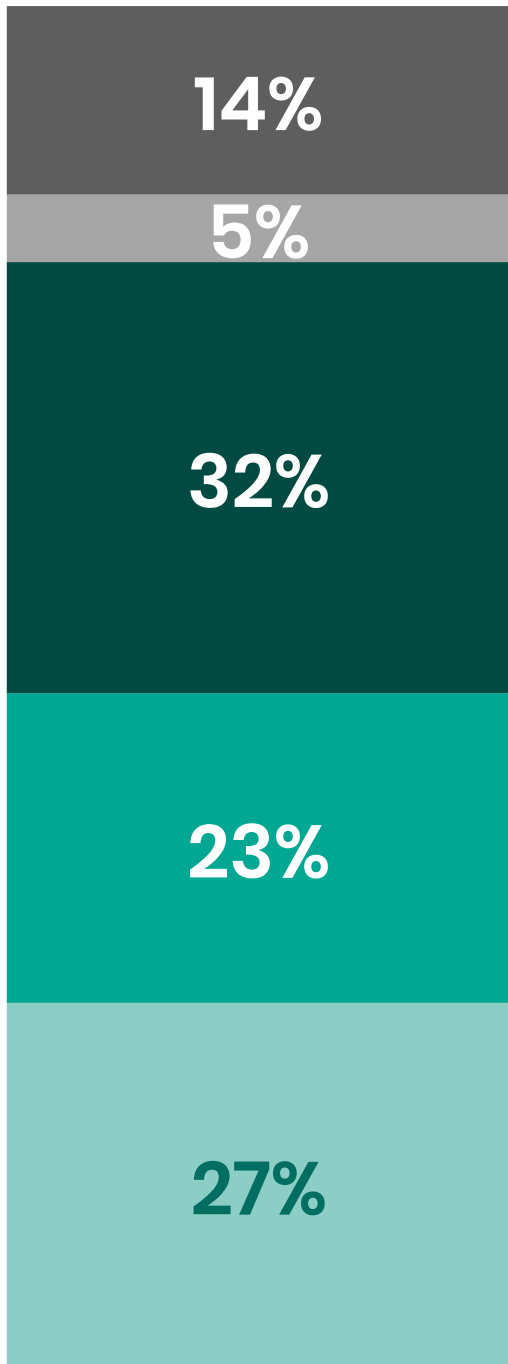
# GENRES DRIVING ABC IN THE FALL



Fall 2008



Fall 2017



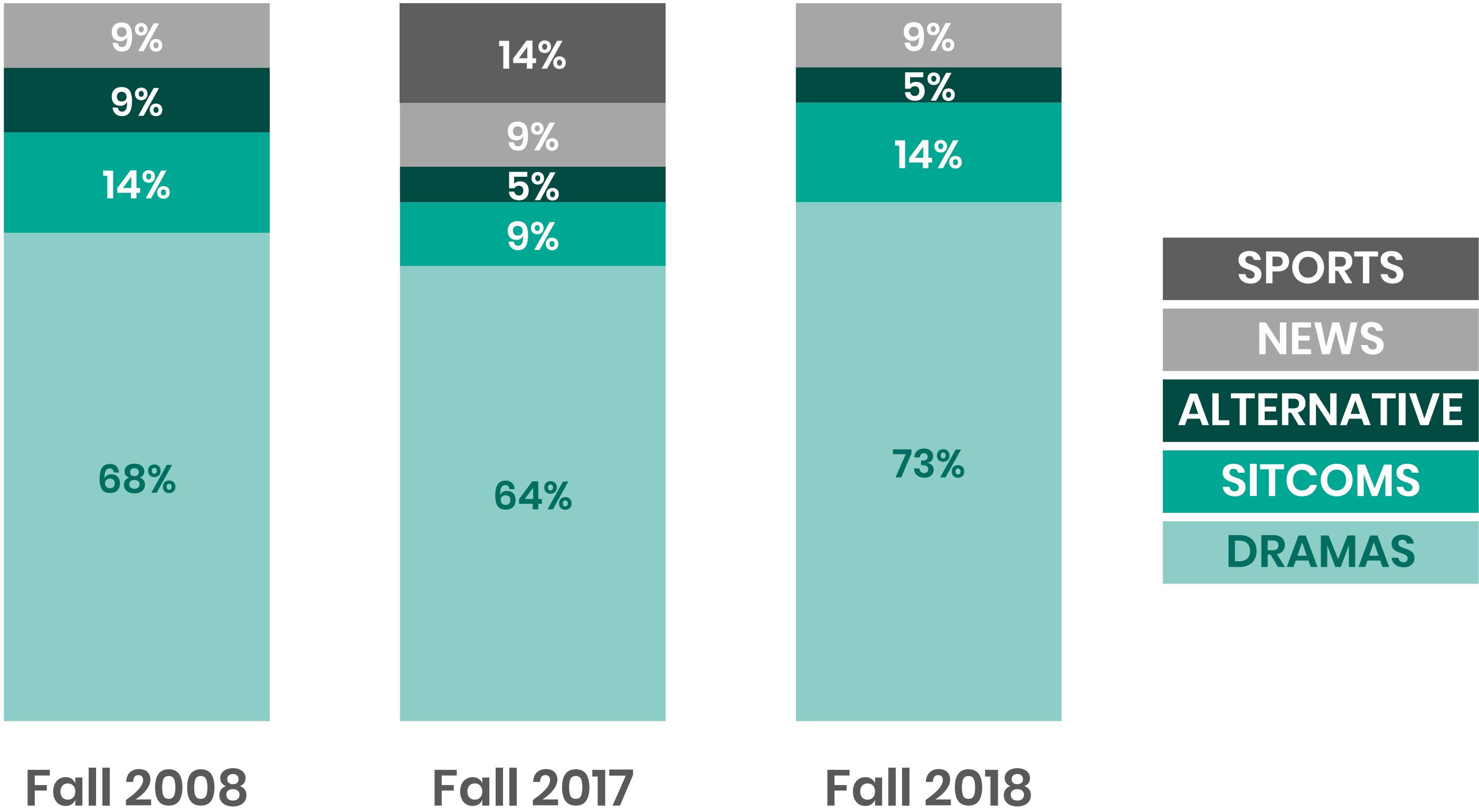
Fall 2018



Local Impact.  
National Influence.

Based upon the Network's schedule half-hour distribution for Fall 2008. The News category also includes TRUE CRIME. Alternative=Reality, Game Show, Competition, Video, Talk.

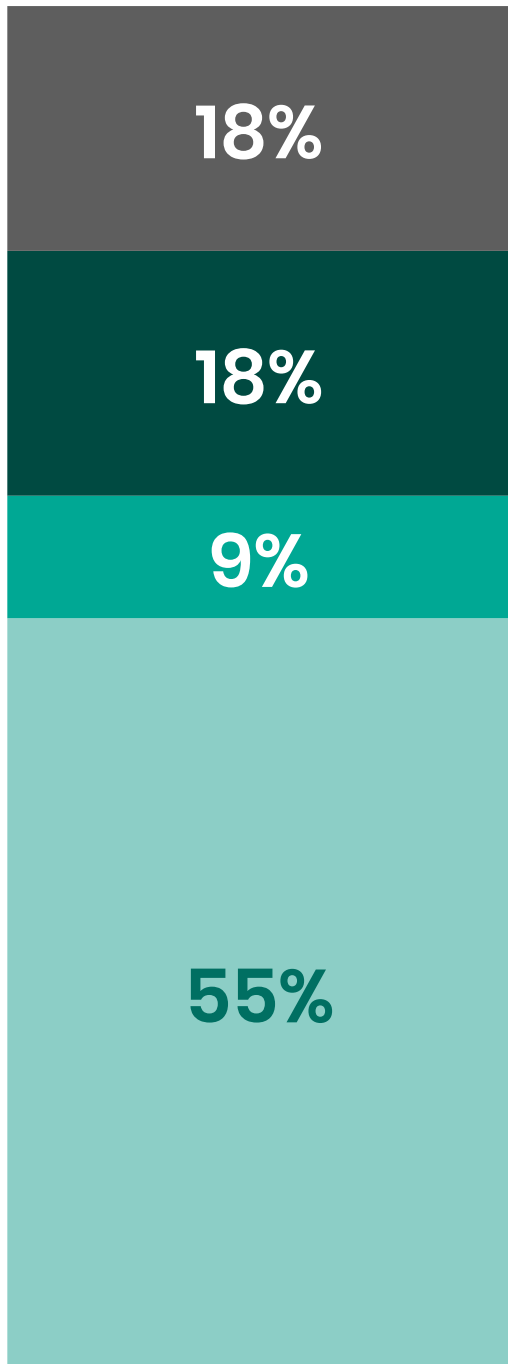
# GENRES DRIVING CBS IN THE FALL



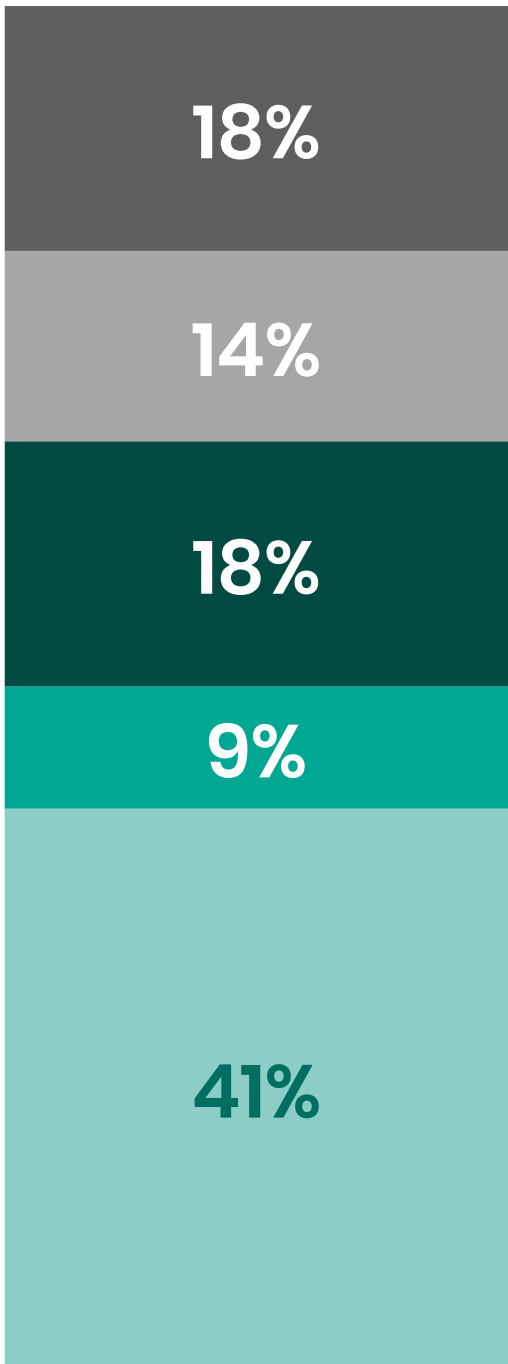
Local Impact.  
National Influence.

Based upon the Network's schedule half-hour distribution for Fall 2008. The News category also includes TRUE CRIME. Alternative=Reality, Game Show, Competition, Video, Talk.

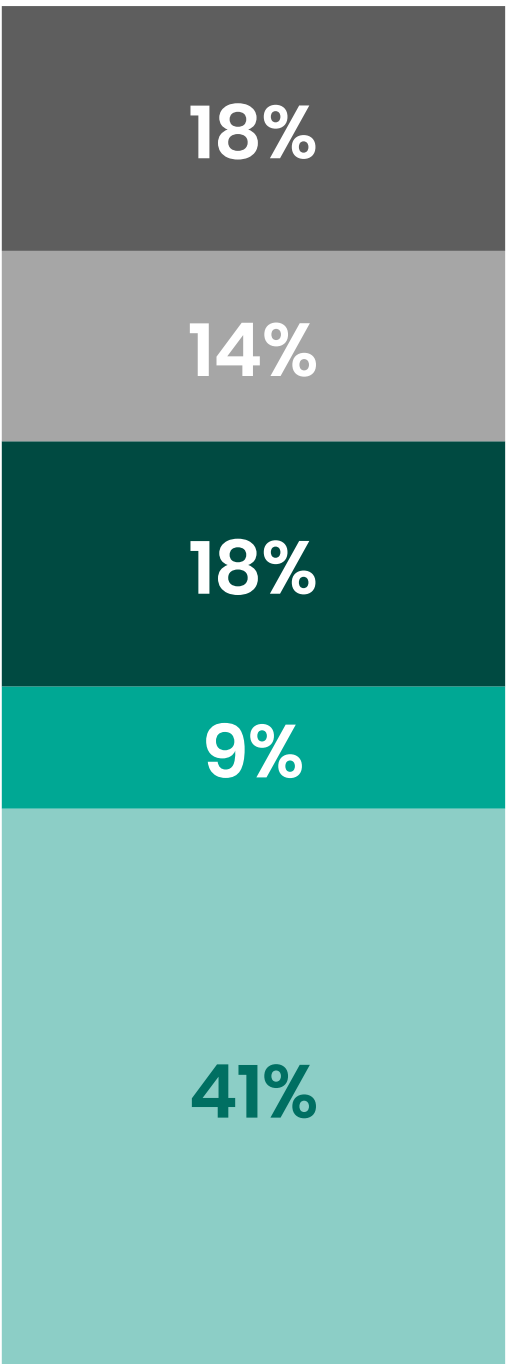
# GENRES DRIVING NBC IN THE FALL



Fall 2008



Fall 2017



Fall 2018

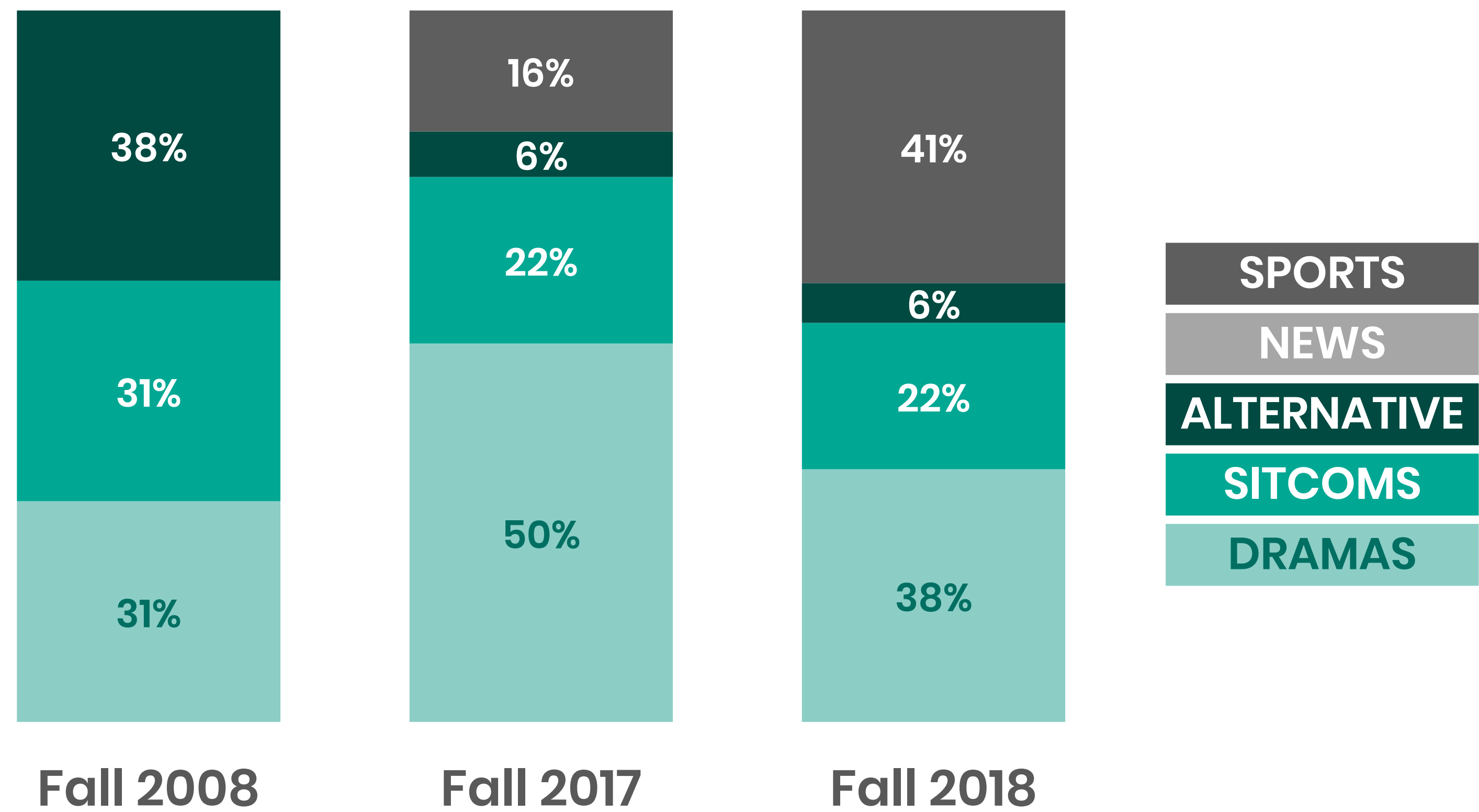


Local Impact.  
National Influence.

Based upon the Network's schedule half-hour distribution for Fall 2008. The News category also includes TRUE CRIME. Alternative=Reality, Game Show, Competition, Video, Talk.



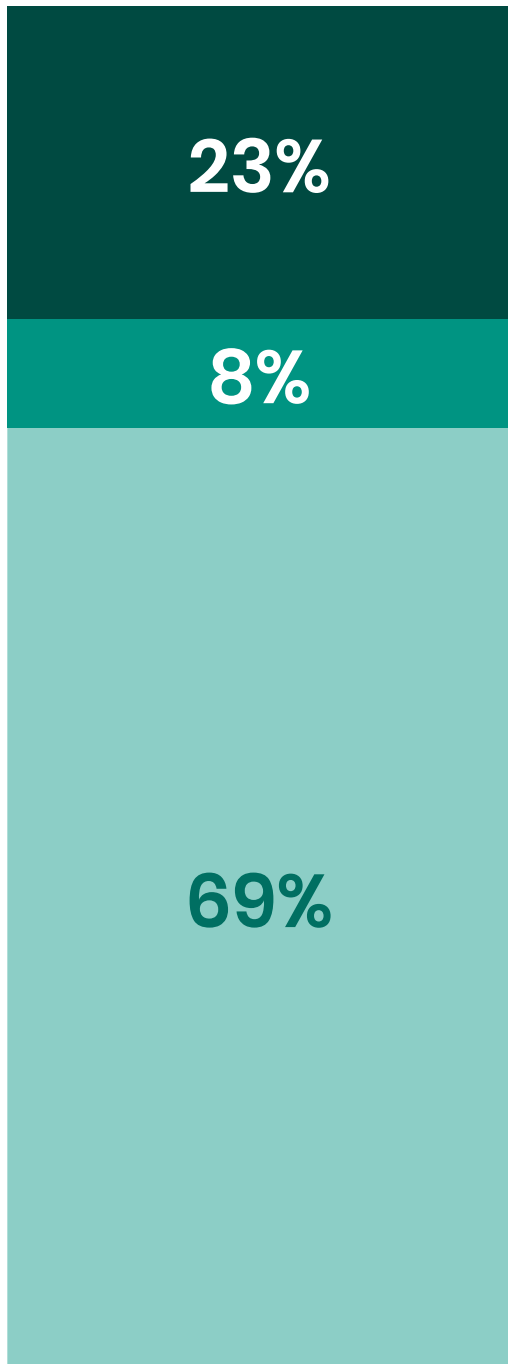
# GENRES DRIVING FOX IN THE FALL



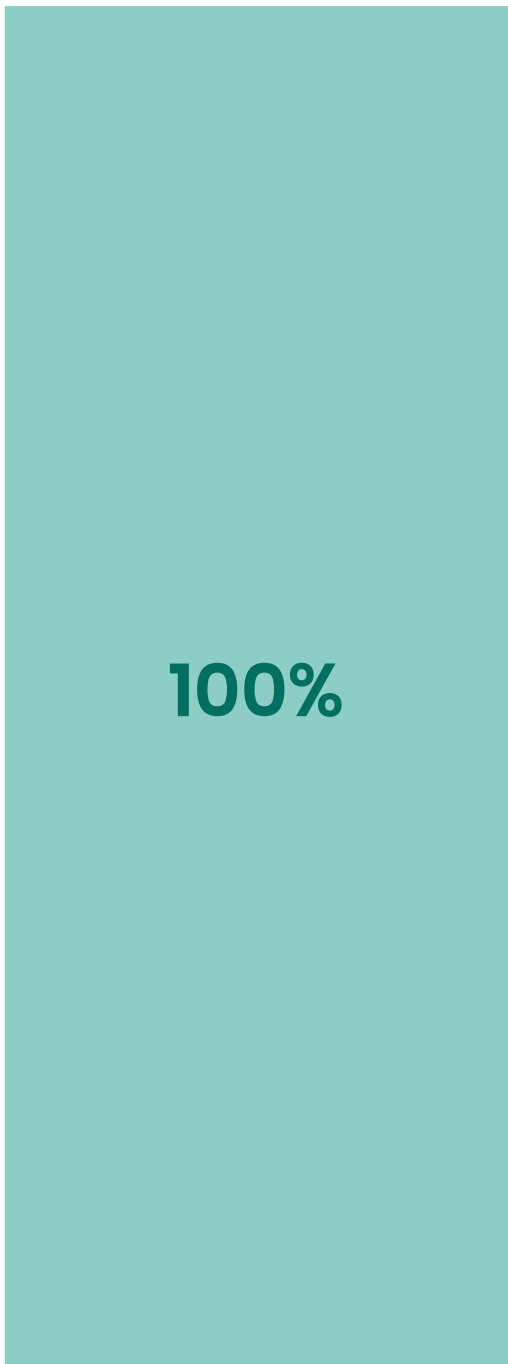
Local Impact.  
National Influence.

Based upon the Network's schedule half-hour distribution for Fall 2008. The News category also includes TRUE CRIME. Alternative=Reality, Game Show, Competition, Video, Talk.

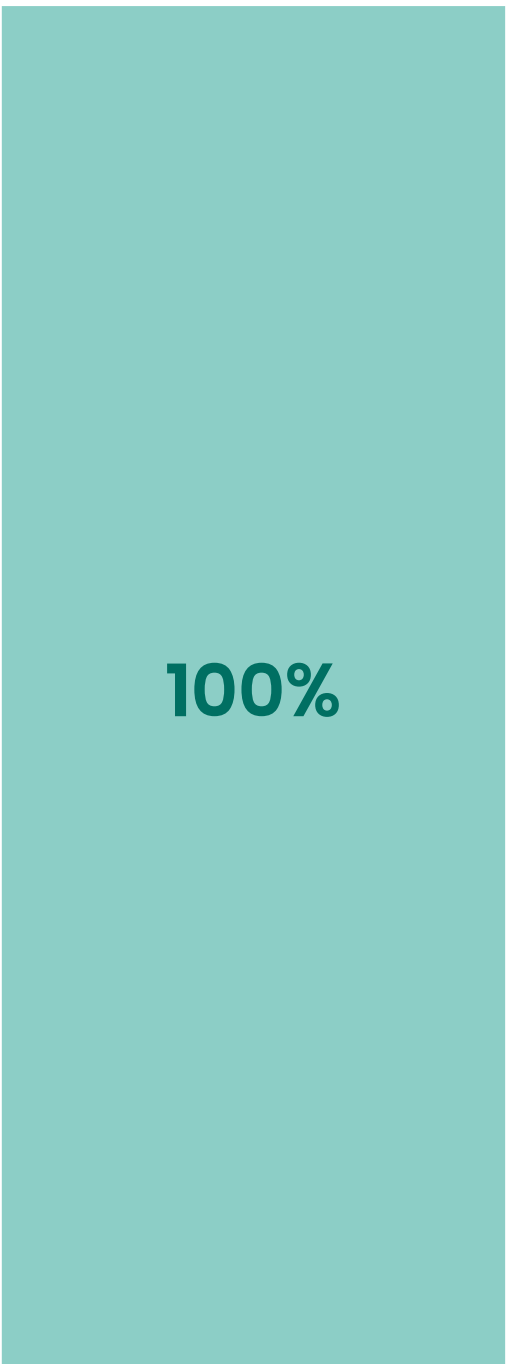
# GENRES DRIVING THE CW IN THE FALL



Fall 2008



Fall 2017



Fall 2018

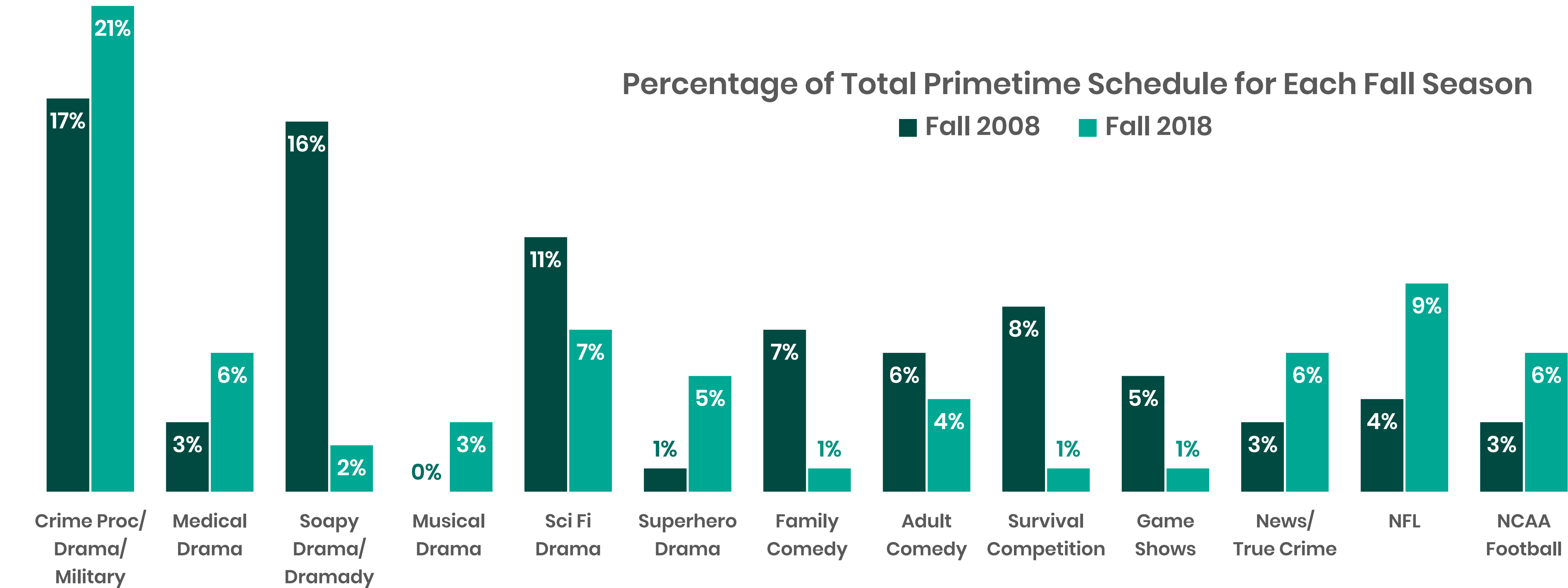


Local Impact.  
National Influence.

Based upon the Network's schedule half-hour distribution for Fall 2008. The News category also includes TRUE CRIME. Alternative=Reality, Game Show, Competition, Video, Talk.

# SPECIFIC PRIMETIME GENRE TRENDS – FALL ‘08 TO FALL ‘18

ABC, CBS, NBC, FOX & The CW



Local Impact.  
National Influence.

Based upon Fall Season schedules broken out into 24 specific genres. Above are the categories with the most change over the last 10 Fall's.



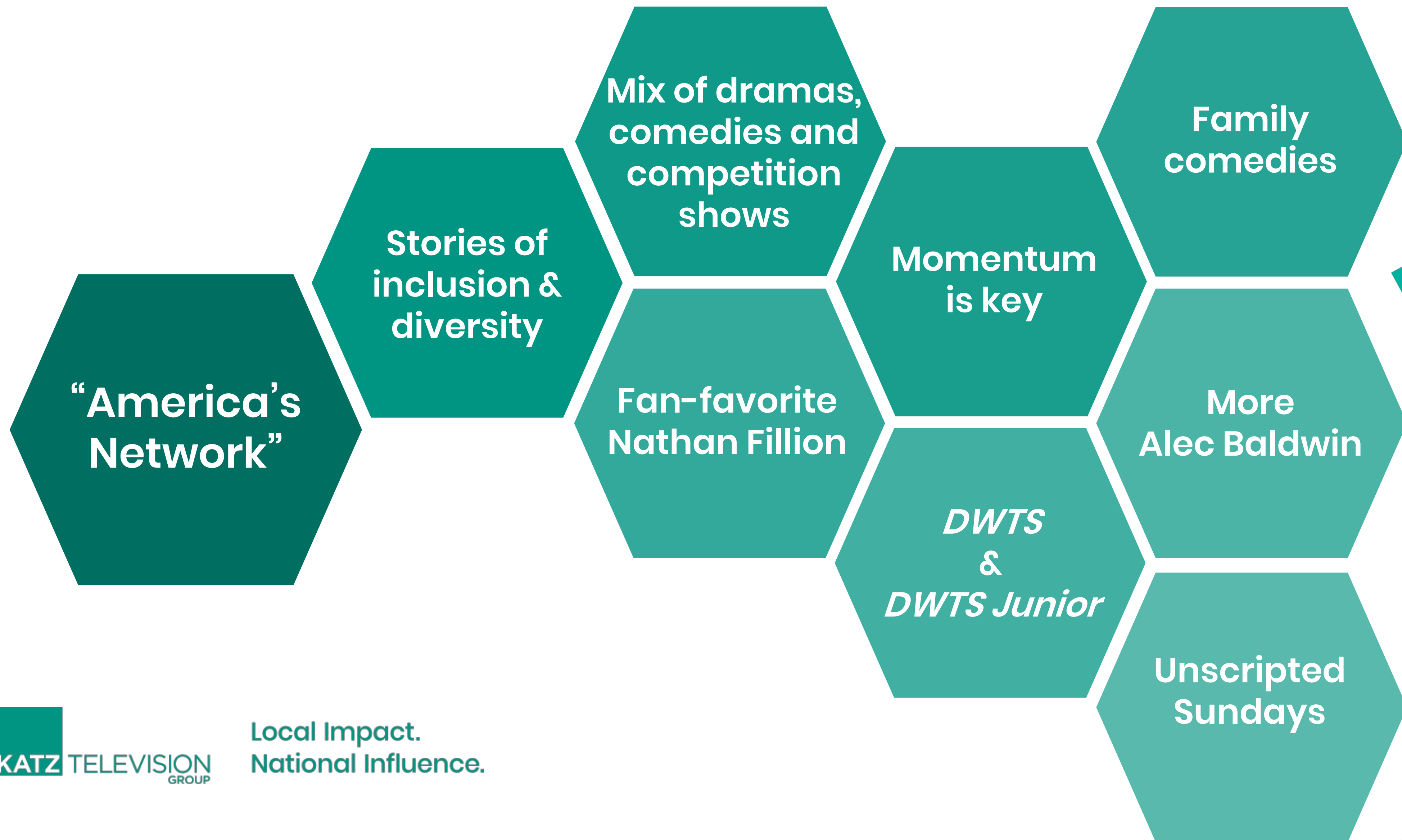
# NETWORK PRIMETIME PROGRAMMING STRATEGIES

Fall 2018



Local Impact.  
National Influence.

# FALL 2018 ABC PROGRAMMING STRATEGIES







# WILL VIEWERS TUNE IN?

According to Katz Media's  
Our Media panel,

**7 out of 10**

*Roseanne* viewers say they  
will tune in to *The Conners*



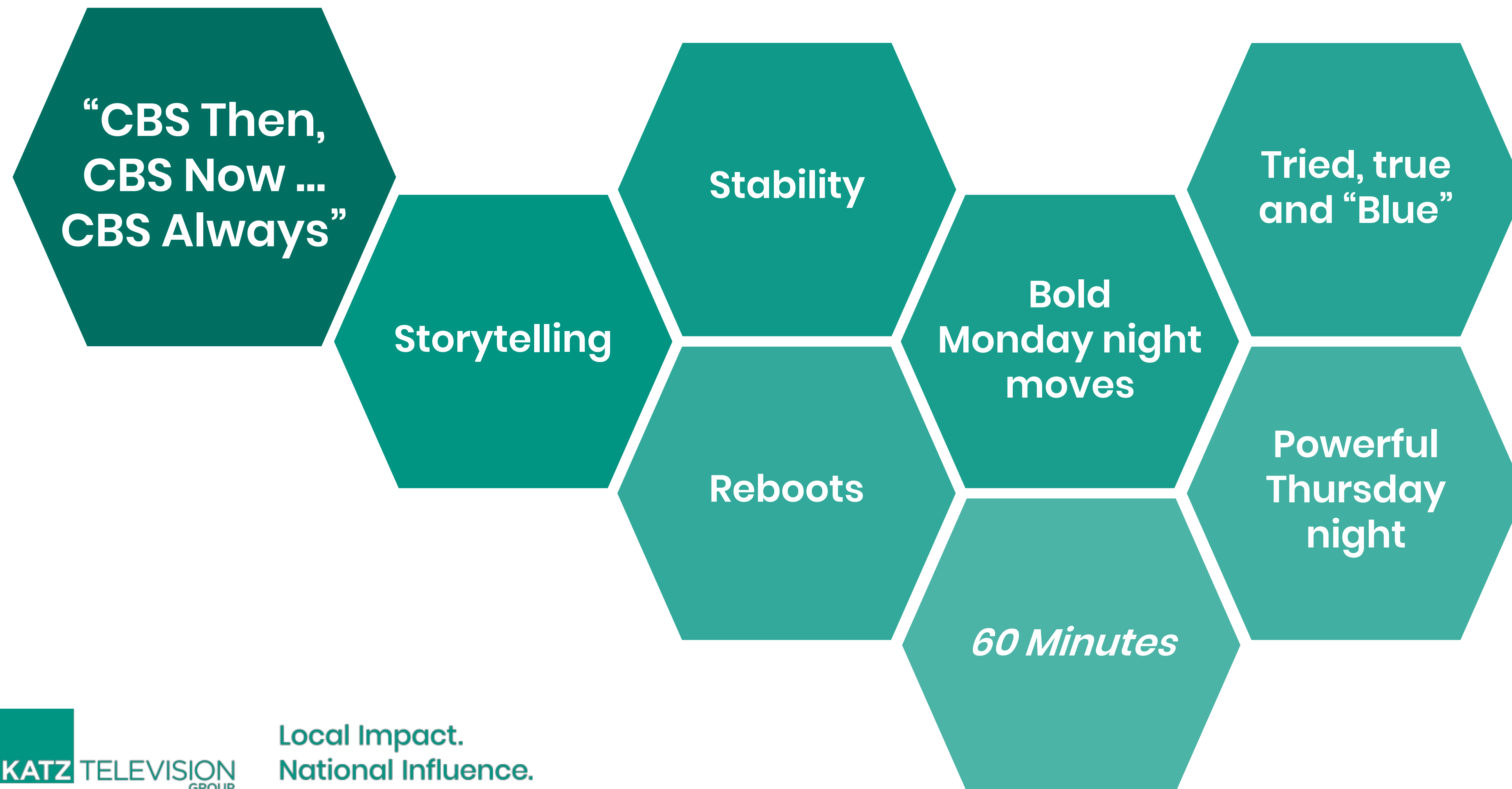
Local Impact.  
National Influence.



Source: Our Media Community from the Katz Media Group.  
Data based on 300 people who've watched live TV in the past week. Fieldwork August 16 - 20.



# FALL 2018 CBS PROGRAMMING STRATEGIES



# FALL 2018 NBC PROGRAMMING STRATEGIES



**“Unequaled  
NBC”**

**Intact  
schedule,  
with a few  
exceptions**

*Sunday  
Night  
Football*

*This Is Us*

**Family  
friendly  
unscripted  
series**

**Thursday  
nights are  
for comedies  
& drama**

**Dick Wolf  
*Chicago*  
Wednesday  
night**

*Dateline*

# FALL 2018 FOX PROGRAMMING STRATEGIES

**FOX**

**“New FOX”**

**Sports and  
entertainment**

*Thursday  
Night  
Football*

*Lethal  
Weapon  
with changes*

**Unscripted  
programming**

**Wednesday  
night  
*Empire/Star*  
combo**

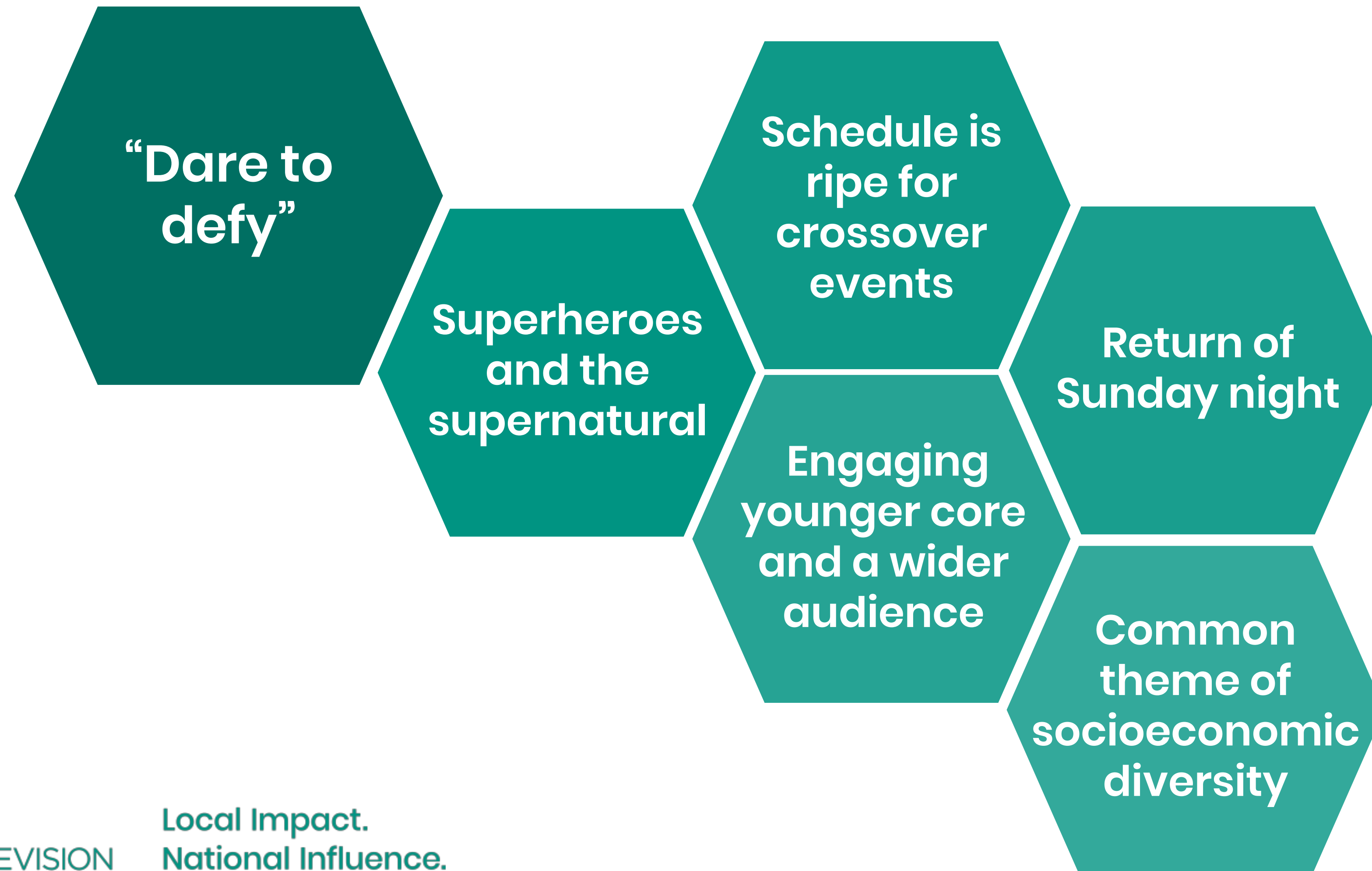
**Monday night  
of first  
responders  
& doctors**

*Last Man  
Standing*

**New try for  
live-action in  
“Animation  
Domination”**



# FALL 2018 CW PROGRAMMING STRATEGIES



# NETWORK PRIMETIME SCHEDULES






Fall 2018



Local Impact.  
National Influence.

# FALL 2018 NETWORK PRIMETIME SCHEDULE





MONDAY

	8:00	8:30	9:00	9:30	10:00
	DANCING WITH THE STARS				THE GOOD DOCTOR
	<u>THE NEIGHBORHOOD</u>	<u>HAPPY TOGETHER</u>	<u>MAGNUM, P.I.</u>		BULL
	THE VOICE				<u>MANIFEST</u>
	THE RESIDENT (NTP)		9-1-1 (NTP)		
	ARROW (NTP)		DC LEGENDS OF TOMORROW (NTP)		








# FALL 2018 NETWORK PRIMETIME SCHEDULE

TUESDAY

	8:00	8:30	9:00	9:30	10:00
	THE CONNERS	<u>THE KIDS ARE ALRIGHT</u>	BLACK-ISH	SPLITTING UP TOGETHER	<u>THE ROOKIE</u>
	NCIS		<u>FBI</u>		NCIS: NEW ORLEANS
	THE VOICE		THIS IS US		<u>NEW AMSTERDAM</u>
	THE GIFTED (NTP)		LETHAL WEAPON (NTP)		
	THE FLASH		BLACK LIGHTNING		






# FALL 2018 NETWORK PRIMETIME SCHEDULE

## WEDNESDAY

	8:00	8:30	9:00	9:30	10:00
	THE GOLDBERGS	AM HOUSEWIFE (NTP)	MODERN FAMILY	<u>SINGLE PARENTS</u>	<u>A MILLION LITTLE THINGS</u>
	SURVIVOR 37		SEAL TEAM		CRIMINAL MINDS
	CHICAGO MED (NTP)		CHICAGO FIRE (NTP)		CHICAGO P.D.
	EMPIRE		STAR		
	RIVERDALE		<u>ALL AMERICAN</u>		

# FALL 2018 NETWORK PRIMETIME SCHEDULE

## THURSDAY

	8:00	8:30	9:00	9:30	10:00
	GREY'S ANATOMY		STATION 19		HOW TO GET AWAY WITH MURDER
	BIG BANG THEORY	YOUNG SHELDON	MOM	<u>MURPHY BROWN</u>	S.W.A.T.
	SUPERSTORE	THE GOOD PLACE	WILL & GRACE	<u>I FEEL BAD</u>	LAW & ORDER: SVU (NTP)
	THURSDAY NIGHT FOOTBALL				
	SUPERNATURAL		<u>LEGACIES</u>		



# FALL 2018 NETWORK PRIMETIME SCHEDULE

FRIDAY

	8:00	8:30	9:00	9:30	10:00
	FRESH OFF THE BOAT (NTP)	SPEECHLESS (NTP)	CHILD SUPPORT		20/20
	MACGYVER		HAWAII 5-0		BLUE BLOODS
	BLINDSPOT		MIDNIGHT, TEXAS		DATELINE
	<u>LAST MAN STANDING</u>	<u>THE COOL KIDS</u>	HELL'S KITCHEN		
	DYNASTY		CRAZY EX-GIRLFRIEND		



# FALL 2018 NETWORK PRIMETIME SCHEDULE

SATURDAY

	8:00	8:30	9:00	9:30	10:00
	SATURDAY NIGHT FOOTBALL				
	CRIMETIME SATURDAY (R)		CRIMETIME SATURDAY (R)		48 HOURS
	DATELINE SATURDAY NIGHT MYSTERY				SNL ENCORES
	SPORTS SATURDAY: COLLEGE FOOTBALL				
					

# FALL 2018 NETWORK PRIMETIME SCHEDULE

SUNDAY

	7:00	7:30	8:00	8:30	9:00	9:30	10:00
	AMERICA'S FUNNIEST HOME VIDEOS		<u>DANCING WITH THE STARS: JUNIORS</u>		SHARK TANK (NTP)		<u>THE ALEC BALDWIN SHOW</u>
	60 MINUTES		<u>GOD FRIENDED ME</u>		NCIS: LA		MADAM SECRETARY
	FOOTBALL NT AMERICA 1	FOOTBALL NT AMERICA 2	FOOTBALL NT AMERICA 3	SUNDAY NIGHT FOOTBALL			
	NFL ON FOX	THE OT/ENCORES	THE SIMPSONS	BOB'S BURGERS (NTP)	FAMILY GUY	<u>REL</u>	
			SUPERGIRL (NTP)		<u>CHARMED</u>		



# 2018-19 NETWORK PRIMETIME SCHEDULE

## New & Returning Series Premiering Later in the Season



GRAND HOTEL (D)  
SCHOOLED (S)  
THE FIX (D)  
WHISKEY CAVALIER (D)  
\$100,000 PYRAMID  
AMERICAN IDOL  
CELEBRITY FAMILY  
FEUD  
FOR THE PEOPLE  
MARVEL'S-SHIELD  
MATCH GAME



FAM (S)  
THE CODE (D)  
THE RED LINE (D)  
CELEB BIG BROTHER  
ELEMENTARY  
INSTINCT  
MAN WITH A PLAN  
THE AMAZING RACE



ABBY'S (S)  
BROOKLYN 9-9 (from FOX)  
THE ENEMY WITHIN (D)  
THE INBETWEEN (D)  
THE VILLAGE (D)  
TITAN GAMES (A)  
AGT: THE CHAMPIONS  
AMERICA'S GOT TALENT  
A.P. BIO  
ELLEN'S GAME OF GAMES  
GOOD GIRLS  
THE BLACKLIST  
THE WALL  
WORLD OF DANCE



PROVEN INNOCENT (D)  
THE PASSAGE (D)  
COSMOS: POSSIBLE WORLDS (A)  
24 HOURS HELL & BACK  
BEAT SHAZAM  
GOTHAM  
LOVE CONNECTION  
MASTERCHEF  
MASTERCHEF JR  
SHOWTIME AT THE APOLLO  
SO YOU THINK YOU CAN DANCE  
THE FOUR: BATTLE FOR STARDOM



IN THE DARK (D)  
ROSWELL, NM (D)  
IZOMBIE  
JANE THE VIRGIN  
THE 100

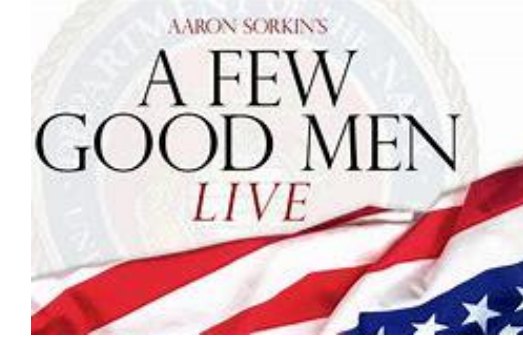


Local Impact.  
National Influence.

... and more.



# 2018-19 NETWORK PRIMETIME LIVE EVENTS



Local Impact.  
National Influence.



# 5 THINGS TO KNOW ABOUT THE SEASON AHEAD ...

**Broadcast delivers the goods**

The POWER of live Television

**The #Social Media impact**

Tried & true programming strategies prevail

**Diversity, inclusion, and coming together**



**HERE'S TO A  
SUCCESSFUL  
2018-19  
SEASON**

**Stay Tuned...**



Local Impact.  
National Influence.