CONTENT STRATEGY
FLASH REPORT

KATZ

NETWORK PRIMETIME PROGRAMMING
Flash #4 - 29 October 2018

The 2018-19 primetime season has reached the four-week mark as we continue to look at the overall network landscape. As of this writing there have been no series casualties yet and several series have been given full season orders.

This week's **FLASH #4** includes:

WEEKLY HEADLINES

- *Of the freshman series THE CONNERS and FBI were the only top 10 players in HH's while THE CONNERS debut episode earned a top 5 showing across A18-49 and A25-54 versus all primetime fare. The other first year series landing in the top 25 one way or another included: MANIFEST, NEW AMSTERDAM, LAST MAN STANDING, THE KIDS ARE ALRIGHT and in HH's only, GOD FRIENDED ME, MURPHY BROWN and THE NEIGHBORHOOD.*
- *FOX was the only network, versus the same four weeks in 2017, to boast gains across the board. The network's addition of THURSDAY NIGHT FOOTBALL, LAST MAN STANDING and the continued success of EMPIRE and sophomore 9-1-1, were all factors in FOX's growth spurt the first four weeks of the new season.*
- *Along with its traditional top ratings performance, the ROSEANNE spin-off THE CONNERS had one of the biggest increases on social media of the Fall season, gaining 4,163 Twitter followers and 6,965 Facebook Likes. It takes the win for biggest increase of any show during its debut week.*

CHART TOPPERS: FIRST 4 WEEKS-PRIMETIME WRAP-UP

#1 Network in Primetime = CBS and NBC tied in HH's, NBC across key adults 18-49 and 25-54
#1 Network from 10:30-11PM = NBC
#1 Network Regular Returning Series (non-sports) = BIG BANG in HH's & A25-54, THIS IS US A18-49
#1 Network Freshman Series = THE CONNERS (previous 3 wks, FBI in HH's, MANIFEST key adults)
#1 Network Drama Series = NCIS in HH's, THIS IS US key adults
#1 Network Sitcom = BIG BANG in HH's, A25-54, THE CONNERS A18-49
#1 Network Primetime Sports Series = NBC SUNDAY NIGHT FOOTBALL
#1 Cable Sports Network = ESPN
#1 Cable Sports Program = NFL Regular season
#1 Ent Cable Network = TBS
#1 Ent Cable Program = THE WALKING DEAD
#1 News Cable Network = FNC
#1 News Cable Program = HANNITY in HH's, tied with TUCKER CARLSON in key adults
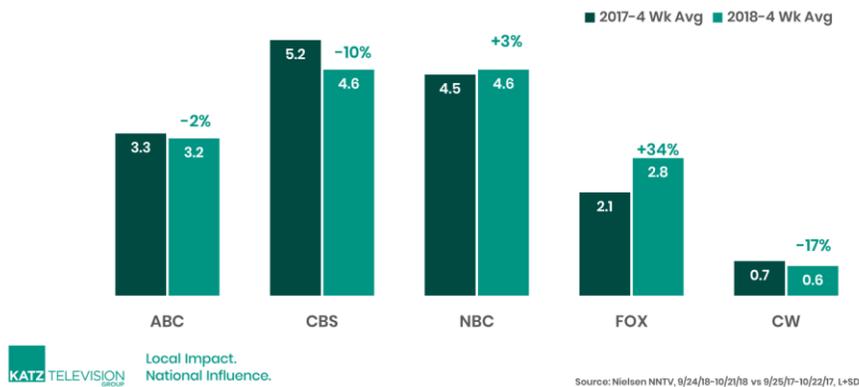
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BY THE NUMBERS

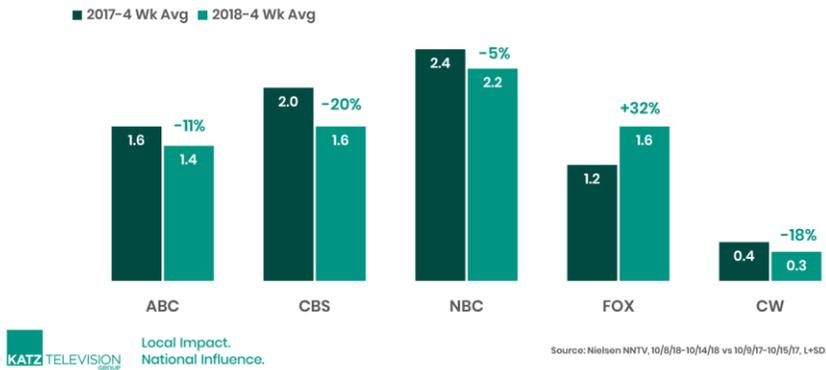*Please see below and the attached* excel *document for all the details.*

Overall Primetime Network Performance

- CBS and NBC tied for 1st in HH's (4.6/9 NTI) for the first four weeks of the new season while NBC was the designated winner among key adults (1.7/7 A18-49, 2.2/8 A25-54),
- FOX was the only network, versus the same four weeks in 2017, to boast gains across the board. In HH's, FOX achieved a 34%/39% increase in HH's (from a 2.1/4 to a 2.8/5) and was up 30%/44% (from a 1.0/4 to a 1.3/5) in A18-49 and up 32%/43% (from a 1.2/4 to a 1.6/6) in A25-54. FOX's addition of THURSDAY NIGHT FOOTBALL, LAST MAN STANDING and the continued success of EMPIRE and sophomore 9-1-1, were all factors in FOX's growth spurt the first four weeks of the season.

PRIMETIME YEAR-TO-YEAR HH RATINGS PERFORMANCE
FIRST 4 Weeks 2018 vs 2017

■ 2017-4 Wk Avg ■ 2018-4 Wk Avg

	ABC	CBS	NBC	FOX	CW
2017-4 Wk Avg	3.3	5.2	4.5	2.1	0.7
2018-4 Wk Avg	3.2	4.6	4.6	2.8	0.6
Change	-2%	-10%	+3%	+34%	-17%

Source: Nielsen NNTV, 9/24/18-10/21/18 vs 9/25/17-10/22/17, L+SD.

Local Impact.
National Influence.

PRIMETIME YEAR-TO-YEAR A25-54 RATINGS PERFORMANCE
FIRST 4 Weeks 2018 vs 2017

■ 2017-4 Wk Avg ■ 2018-4 Wk Avg

	ABC	CBS	NBC	FOX	CW
2017-4 Wk Avg	1.6	2.0	2.4	1.2	0.4
2018-4 Wk Avg	1.4	1.6	2.2	1.6	0.3
Change	-11%	-20%	-5%	+32%	-18%

Source: Nielsen NNTV, 10/8/18-10/14/18 vs 10/9/17-10/15/17, L+SD.

Local Impact.
National Influence.

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

- Thanks, in part, to the success of its new 10PM dramas MANIFEST and NEW AMSTERDAM as well as the #1 rated SUNDAY NIGHT FOOTBALL and the continued strength of CHICAGO PD and LAW & ORDER: SVU, NBC boasted the highest rated performance in HH's (4.4/9) leading into the local news, up over the same four weeks last year (3.8/9) by 14%/20%. NBC achieved another 1st place finish in A18-49 (1.6/7) and A25-54 (2.1/8), doubling its share delivery in A25-54 over CBS (1.2/4).

SCORECARD: WHO TOOK THE NIGHT?

- For the first four weeks of the new season, NBC carried two nights of the week across the board; Monday with THE VOICE and newcomer MANIFEST and Sunday with the highest rated performer of the week, SUNDAY NIGHT FOOTBALL.
- CBS garnered P2+ and HH wins on Tuesday (NCIS, FBI, NCIS: NOLA), Wednesday (SURVIVOR, SEAL TEAM and CRIMINAL MINDS) and Friday (MACGYVER, HAWAII 5-0, BLUE BLOODS). The eye-network tied with NBC (the CHICAGO's) for 1st place on Wednesday and with FOX (LAST MAN STANDING, THE COOL KIDS, HELL'S KITCHEN) on Friday in A25-54.
- FOX finished 1st on Thursday across the board with THURSDAY NIGHT FOOTBALL and achieved the top spot on Wednesday (EMPIRE, STAR) and Friday among A18-34 and A18-49.
- ABC's only nightly win continues to fall on Saturday with SATURDAY NIGHT COLLEGE FOOTBALL.
- Versus the first four weeks of last season, ABC's HH win in 2017 became NBC's, CBS' Thursday key demo win became FOX's and everything else remained relatively consistent.

NIGHT-BY-NIGHT SCORECARD WINS

Fall 2018 –First 4 Weeks Average

	MON	TUE	WED	THU	FRI	SAT	SUN
P2+	NBC	CBS	CBS	FOX	CBS	ABC	NBC
HH	NBC	CBS	CBS	FOX	CBS	ABC	NBC
A18-34	NBC	NBC	FOX	FOX	FOX	ABC	NBC
A18-49	NBC	NBC	FOX	FOX	FOX	ABC	NBC
A25-54	NBC	NBC	CBS/NBC	FOX	CBS/FOX	ABC	NBC

Fall 2017 –First 4 Weeks Average

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

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Local Impact.
National Influence.

Source: Nielsen NNTV, 9/24/18-10/21/18 vs 9/25/17-10/22/17, based on selected demo ratings.

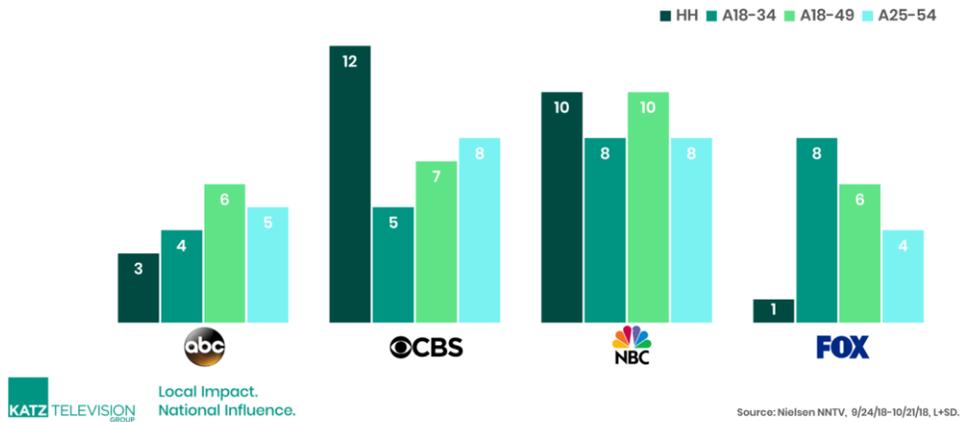# TOP IT OFF: TOP 10, TOP 15, TOP 25 PROGRAMS

- SUNDAY NIGHT FOOTBALL and THURSDAY NIGHT FOOTBALL scored the #1 and #2 spots in HH's and all key demos for the first four weeks of the new season.
- THE BIG BANG THEORY (7.7/14) and NCIS (7.6/14) were the top scripted series in HH's with BIG BANG #1 in A25-54 (3.5/13). THIS IS US garnered the #1 position in A18-34 (1.7/9) and A18-49 rating (2.5/10), one-tenth of a rating point above THE CONNERS (2.4/10) in A18-49.
- Of the freshman series THE CONNERS (6.7/12) and FBI (6.0/11) were the only top 10 players in HH's while THE CONNERS debut episode earned that honor across A18-49 (2.4/10, #5) and A25-54 (3.3/11, #5). The other first year series landing in the top 25 one way or another included: MANIFEST, NEW AMSTERDAM, LAST MAN STANDING, THE KIDS ARE ALRIGHT and in HH's only, GOD FRIENDED ME, MURPHY BROWN and THE NEIGHBORHOOD.

TOP 25 PROGRAMS: NETWORK TALLY

Number of Programs per Demo

- CBS boasted the most number of programs again in the top 25 HH's, NBC and FOX tied in A18-34, CBS and NBC tied in A25-54 and NBC registered the highest amount of series in A18-49
- Of the count in the tally below: ABC delivered one new series in each HH's and A18-34 and two each in A18-49 and A25-54; CBS achieved three new series in HH's and one in A25-54; NBC had two in HH's and each of the demos; and FOX placed one in each of the demos.
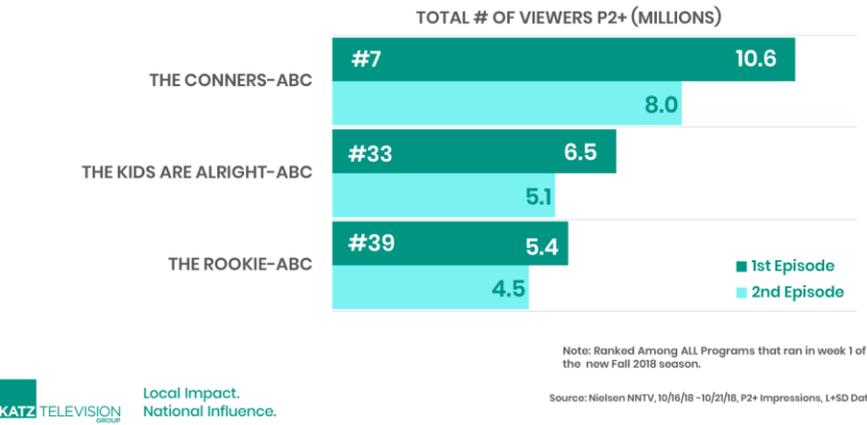
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TOP 25 PROGRAMS: NETWORK TALLY– 4 WEEK Avg
Number of Programs Per Demo

■ HH ■ A18-34 ■ A18-49 ■ A25-54

Source: Nielsen NNTV, 9/24/18-10/21/18, L+SD.

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Local Impact.
National Influence.

WHERE DO THE FRESHMAN SERIES STAND AGAINST EACH OTHER?

- Of the three first-year series to premiere in week 4 of the new season, all ABC and all on Tuesday night, it's no surprise that ROSEANNE spin-off THE CONNERS turned in the most viewers, 10.6 million. THE KIDS ARE ALRIGHT followed with 6.5 million and THE ROOKIE with 5.4 million. All three programs turned in declines from episode one to episode two.

WHERE DO THE FRESHMAN SERIES STAND?
Fall 2018- Wk 4 Premieres

TOTAL # OF VIEWERS P2+ (MILLIONS)

THE CONNERS–ABC   #7   10.6 / 8.0
THE KIDS ARE ALRIGHT–ABC   #33   6.5 / 5.1
THE ROOKIE–ABC   #39   5.4 / 4.5

■ 1st Episode
■ 2nd Episode

Note: Ranked Among ALL Programs that ran in week 1 of the new Fall 2018 season.

Source: Nielsen NNTV, 10/16/18 -10/21/18, P2+ Impressions, L+SD Data.

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Local Impact.
National Influence.

- Looking at the week-to-week performance of the first-year dramas, all of them showed the biggest drop-off in performance from week one to week two.
- MANIFEST, GOD FRIENDED ME and FBI started out with the most total viewers while A MILLION LITTLE THINGS debuted to the lowest. After four weeks these three shows still achieve the most viewers, but the order has changed to FBI, GOD FRIENDED ME and MANIFEST. A MILLION LITTLE THINGS remained the lowest performing freshman drama in P2+.

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WHERE DO THE FRESHMAN DRAMAS STAND?
Fall 2018-Wk-By-Wk Performance

TOTAL # OF VIEWERS P2+ (MILLIONS)

Legend:
- Wk 1
- Wk 2
- Wk 3
- Wk 4

MANIFEST-NBC
- 10.4
- 8.5
- 7.5
- 7.5

GOD FRIENDED ME-CBS
- 10.1
- 8.4
- 7.9
- 8.9

FBI-CBS
- 10.1
- 9.4
- 9.2
- 9.3

NEW AMSTERDAM-NBC
- 8.4
- 7.4
- 7.0
- 6.3

MAGNUM PI-CBS
- 8.1
- 6.2
- 6.1
- 5.5

MILLION LITTLE THINGS-ABC
- 5.1
- 3.8
- 3.7
- 3.3

Local Impact.
National Influence.

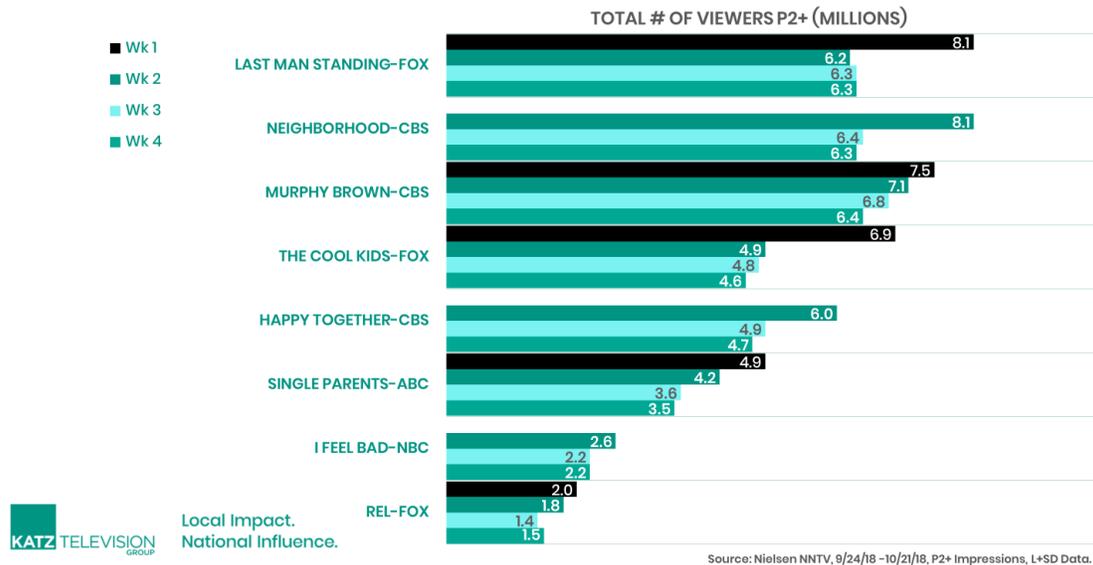KATZ TELEVISION GROUP

Source: Nielsen NNTV, 9/24/18 -10/21/18, P2+ Impressions, L+SD Data.
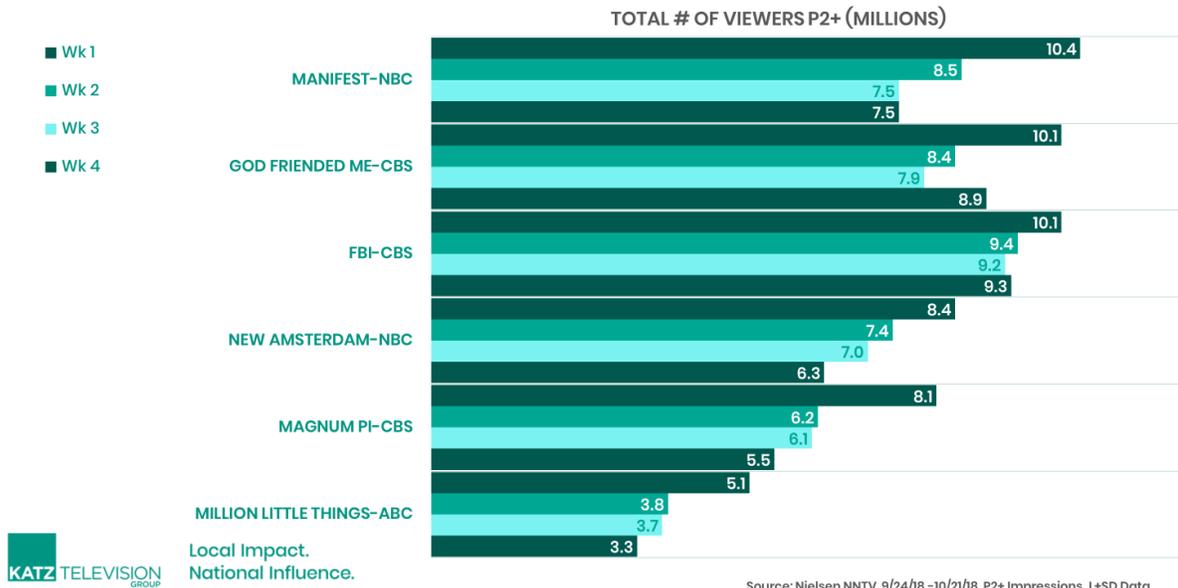
- In reviewing the week-to-week performance of the first-year sitcoms, LAST MAN STANDING, THE NEIGHBORHOOD and MURPHY BROWN were the top performers in their debut episodes.
- By week two, MURPHY BROWN was turning in the #1 sitcom showing among the new comedies and that performance still stands as of week four in P2+.

WHERE DO THE FRESHMAN SITCOMS STAND?
Fall 2018-Wk-By-Wk Performance

TOTAL # OF VIEWERS P2+ (MILLIONS)

Legend:
- Wk 1
- Wk 2
- Wk 3
- Wk 4

LAST MAN STANDING-FOX
- 8.1
- 6.2
- 6.3
- 6.3

NEIGHBORHOOD-CBS
- 8.1
- 6.4
- 6.3

MURPHY BROWN-CBS
- 7.5
- 7.1
- 6.8
- 6.4

THE COOL KIDS-FOX
- 6.9
- 4.9
- 4.8
- 4.6

HAPPY TOGETHER-CBS
- 6.0
- 4.9
- 4.7

SINGLE PARENTS-ABC
- 4.9
- 4.2
- 3.6
- 3.5

I FEEL BAD-NBC
- 2.6
- 2.2
- 2.2

REL-FOX
- 2.0
- 1.8
- 1.4
- 1.5

Local Impact.
National Influence.

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Source: Nielsen NNTV, 9/24/18 -10/21/18, P2+ Impressions, L+SD Data.

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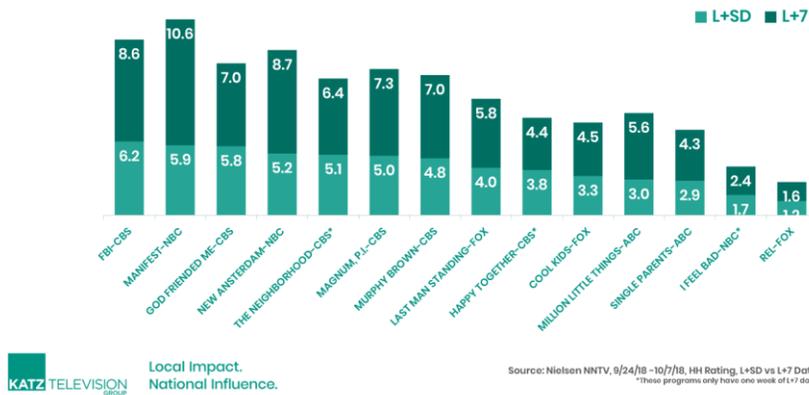
WATCH IT LIVE+SD OR LIVE+7

- With the second week of Live+7 data available, we can see MANIFEST continued to deliver a 2nd place position among the new series in L+SD HH's behind FBI, but became the #1 freshman series with L+7 data, jumping from a 5.9 to a 10.6 in HH's.

PRIMETIME HH RATINGS PERFORMANCE – Fall 2018
LIVE+SD versus L+7 – Weeks 1 & 2 Average

Source: Nielsen NNTV, 9/24/18 –10/7/18, HH Rating, L+SD vs L+7 Data.
*These programs only have one week of L+7 data.

IN THIS CORNER: FALL 2018 FRESHMAN   FALL 2018 TP

- When comparing the Fall 2018 crop of new series to the Fall 2017-time periods, the big winners across the board were: THE CONNERS (vs THE MIDDLE), MANIFEST (vs THE BRAVE), NEW AMSTERDAM (vs LAW & ORDER: TRUE CRIME), LAST MAN STANDING and THE COOL KIDS (vs HELL'S KITCHEN), THE KIDS ARE ALRIGHT (vs FRESH OFF THE BOAT), THE ROOKIE (vs KEVIN SAVES THE WORLD) and GOD FRIENDED ME (vs WISDOM OF THE CROWD).

PRIMETIME NETWORK FRESHMAN SERIES-FALL 2018 vs FALL 2017 TP
Source: Nielsen's NNTV, NTI L+SD data, 09/24/18-10/21/18.

			#TC	Day Of Week	Telecast Start Time	Dur	P2+ Live+SD US AA Proj (000 s)	HHLD Live+SD US AA% (x.x)	HHLD Live+SD US Share %	P18-49 Live+SD US AA% (x.x)	P18-49 Live+SD US Share %	P25-54 Live+SD US AA% (x.x)	P25-54 Live+SD US Share %
Fall 2018	ABC	ALEC BALDWIN SHOW	2	......Su	10:01 PM	118	2,016	1.4	3	0.3	1	0.5	2
Fall 2017	ABC	TEN DAYS IN THE VALLEY	4	......Su	10:00 PM	240	2,716	1.8	3	0.4	2	0.7	2
							-26%	-23%	-20%	-23%	-15%	-26%	-20%
Fall 2018	ABC	MILLION LITTLE THINGS	4	..W....	10:00 PM	240	3,969	2.7	6	0.9	4	1.3	5
Fall 2017	ABC	DESIGNATED SURVIVOR	4	..W....	10:00 PM	240	4,812	3.1	6	0.9	4	1.3	4
							-18%	-12%	-8%	-4%	7%	-1%	8%
Fall 2018	ABC	SINGLE PARENTS	4	..W....	9:31 PM	116	4,067	2.6	5	1.1	5	1.5	5
Fall 2017	ABC	AMERICAN HOUSEWIFE	4	..W....	9:31 PM	116	5,188	3.2	6	1.4	5	2.0	6
							-22%	-17%	-13%	-24%	-15%	-24%	-17%
Fall 2018	ABC	CONNERS, THE	1	.Tu......	8:00 PM	31	10,567	6.7	12	2.4	10	3.3	11
Fall 2017	ABC	MIDDLE, THE	3	.Tu......	8:00 PM	90	5,893	3.6	6	1.5	6	2.0	7
							79%	83%	86%	61%	67%	66%	70%

			#TC	Day Of Week	Telecast Start Time	Dur	P2+ Live+SD US AA Proj (000 s)	HHLD Live+SD US AA% (x.x)	HHLD Live+SD US Share %	P18-49 Live+SD US AA% (x.x)	P18-49 Live+SD US Share %	P25-54 Live+SD US AA% (x.x)	P25-54 Live+SD US Share %
Fall 2018	ABC	KIDS ARE ALRIGHT, THE	1	.Tu.....	8:31 PM	29	6,524	4.1	7	1.4	6	2.1	6
Fall 2017	ABC	FRESH OFF THE BOAT	3	.Tu.....	8:30 PM	90	4,172	2.6	4	1.2	4	1.6	5
							56%	60%	64%	19%	25%	30%	34%
Fall 2018	ABC	ROOKIE, THE	1	.Tu.....	10:00 PM	60	5,427	3.5	7	1.0	4	1.4	5
Fall 2017	ABC	KEVIN SAVES THE WORLD	3	.Tu.....	10:00 PM	180	3,679	2.4	5	0.9	3	1.2	4
							48%	47%	51%	14%	25%	19%	26%
Fall 2018	CBS	GOD FRIENDED ME	4	......Su	VAR	240	8,826	5.5	10	1.1	4	1.8	5
Fall 2017	CBS	WISDOM OF THE CROWD	4	......Su	VAR	240	8,103	5.1	9	1.1	4	1.6	4
							9%	8%	12%	0%	8%	9%	17%
Fall 2018	CBS	FBI	4	.Tu.....	9:00 PM	240	9,493	6.0	11	1.1	4	1.8	6
Fall 2017	CBS	BULL	4	.Tu.....	9:00 PM	240	10,650	6.6	11	1.2	4	2.0	6
							-11%	-9%	-5%	-9%	1%	-10%	-1%
Fall 2018	CBS	HAPPY TOGETHER	3	M.......	8:30 PM	90	5,149	3.3	6	0.9	4	1.5	5
Fall 2017	CBS	9JKL	3	M.......	8:31 PM	88	7,321	4.5	7	1.4	5	2.2	6
							-30%	-27%	-23%	-33%	-25%	-32%	-25%
Fall 2018	CBS	MAGNUM P.I.	4	M.......	9:00 PM	240	6,480	4.1	7	1.0	4	1.5	5
Fall 2017	CBS	KEVIN CAN WAIT/ ME, MYSELF & I	4	M.......	9:00	240	6,270	3.9	7	1.3	5	2.0	6
							3%	6%	-2%	-26%	-29%	-24%	-27%
Fall 2018	CBS	NEIGHBORHOOD, THE	3	M.......	8:00 PM	90	6,934	4.4	8	1.2	5	1.9	6
Fall 2017	CBS	BIG BANG THEORY, THE	4	M.......	8:00 PM	123	14,453	8.6	15	3.2	12	4.6	14
							-52%	-49%	-46%	-63%	-60%	-59%	-56%
Fall 2018	NBC	I FEEL BAD	3	...Th...	9:30 PM	89	2,350	1.6	3	0.6	2	0.8	3
Fall 2017	NBC	GREAT NEWS	4	...Th...	9:30 PM	118	4,236	2.7	5	1.0	4	1.4	4
							-45%	-41%	-38%	-42%	-34%	-40%	-34%
Fall 2018	NBC	NEW AMSTERDAM	4	.Tu.....	10:01 PM	236	7,292	4.8	10	1.5	7	2.0	7
Fall 2017	NBC	LAW & ORDER:TRUE CRIME	4	.Tu.....	10:01 PM	236	4,990	3.3	6	1.2	5	1.6	5
							46%	46%	53%	24%	39%	25%	37%
Fall 2018	NBC	MANIFEST	4	M.......	10:00 PM	240	8,455	5.3	10	1.8	7	2.4	8
Fall 2017	NBC	BRAVE	4	M.......	10:01 PM	236	5,309	3.3	6	1.1	4	1.5	5
							59%	59%	66%	55%	75%	59%	75%
Fall 2018	FOX	REL	4	......Su	9:30PM	114	1,678	1.1	2	0.7	2	0.8	2
Fall 2017	FOX	LAST MAN ON EARTH	4	......Su	9:30 PM	120	2,109	1.3	2	0.9	3	1.0	3
							-20%	-19%	-16%	-23%	-16%	-24%	-18%
Fall 2018	FOX	COOL KIDS, THE	4	....F..	8:30 PM	121	5,294	3.1	6	1.1	6	1.6	6
Fall 2017	FOX	HELL'S KITCHEN	4	....F..	8:00 PM	243	2,893	1.8	4	0.8	4	1.1	4
							83%	72%	76%	36%	45%	48%	55%
Fall 2018	FOX	LAST MAN STANDING	4	....F..	8:00 PM	120	6,727	3.8	8	1.4	8	2.1	9
Fall 2017	FOX	HELL'S KITCHEN	4	....F..	8:00 PM	243	2,893	1.8	4	0.8	4	1.1	4
							133%	113%	124%	74%	97%	91%	112%
Fall 2018	CW	ALL AMERICAN	2	..W....	9:00 PM	120	647	0.4	1	0.2	1	0.2	1
Fall 2017	CW	DYNASTY	2	..W....	9:00 PM	121	1,089	0.7	1	0.3	1	0.3	1
							-41%	-39%	-36%	-37%	-29%	-37%	-31%

Note: Just like sophomore series SWAT, MURPHY BROWN's year agp TP was NFL THURSDAY NIGHT FOOTBALL, not a fair comparison. We'll have some relative year ago numbers in a couple weeks

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THE SOPHOMORE STAND-OFF: FALL 2018   FALL 2017

- Most of the sophomore series that started year two this September have posted declines either from their own year ago performances, such as THE GOOD DOCTOR, SEAL TEAM, YOUNG SHELDON and WILL & GRACE; or from the programs that aired in the Sept '17 TP (THE GIFTED vs LETHAL WEAPON, CHILD SUPPORT vs INHUMANS, SPLITTING UP TOGETHER vs THE MAYOR and BLACK LIGHTNING vs DC LEGENDS).

- Two FOX series turned in TP increases versus year ago in HH's and across all key demos: 9-1-1 grew THE GIFTED Monday, 9PM TP and THE RESIDENT boosted the Monday, 8PM TP over LUCIFER.

PRIMETIME NETWORK SOPHOMORE SERIES-FALL 2018 vs FALL 2017
Source: Nielsen's NNTV, NTI L+SD data, 09/24/18-10/21/18.

First Telecast Date			# of Telecasts	Day Of Week	Telecast Start Time	Dur	P2+ Live+SD US AA Proj (000 s)	HHLD Live+SD US AA% (x.x)	HHLD Live+SD US Share %	P18-49 Live+SD US AA% (x.x)	P18-49 Live+SD US Share %	P25-54 Live+SD US AA% (x.x)	P25-54 Live+SD US Share %
10/05/2018	ABC	CHILD SUPPORT	3	....F..	9:00 PM	183	2,003	1.4	3	0.4	2	0.5	2
09/29/2017	ABC	MARVEL'S INHUMANS	4	....F..	9:00 PM	300	2,901	1.9	4	0.7	3	1.0	4
							-31%	-28%	-26%	-45%	-41%	-46%	-43%
10/04/2018	ABC	STATION 19	3	...Th...	9:00 PM	179	5,295	3.5	6	1.1	4	1.4	4
10/05/2017	ABC	SCANDAL	3	...Th...	9:00 PM	180	5,075	3.5	6	1.2	4	1.5	5
							4%	2%	7%	-14%	-3%	-11%	-2%
10/16/2018	ABC	SPLITTING UP	1	.Tu.....	9:30 PM	30	3,307	2.2	4	0.9	3	1.2	4
10/03/2017	ABC	MAYOR, THE	3	.Tu.....	9:30 PM	90	3,496	2.2	4	1.0	4	1.4	4
							-5%	-2%	2%	-13%	-6%	-10%	-4%
09/24/2018	ABC	GOOD DOCTOR, THE	4	M......	10:00 PM	240	7,112	4.6	9	1.1	5	1.5	5
09/25/2017	ABC	GOOD DOCTOR, THE	4	M......	10:01 PM	236	10,892	6.9	13	2.1	8	2.6	8
							-35%	-33%	-30%	-46%	-39%	-43%	-37%
10/03/2018	CBS	SEAL TEAM	3	..W....	9:01 PM	177	5,292	3.3	6	0.8	3	1.3	4
09/27/2017	CBS	SEAL TEAM	4	..W....	9:00 PM	240	8,351	5.1	9	1.3	5	1.8	6
							-37%	-36%	-32%	-35%	-27%	-31%	-25%
09/24/2018	CBS	YOUNG SHELDON	4	M..Th...	8:31 PM	119	10,874	6.6	12	1.8	7	2.8	9
09/25/2017	CBS	YOUNG SHELDON	1	M......	8:30 PM	30	17,215	10.0	17	3.8	14	5.5	16
							-37%	-34%	-29%	-54%	-46%	-49%	-42%
10/04/2018	NBC	WILL & GRACE	3	...Th...	9:00 PM	91	3,574	2.4	4	0.9	4	1.3	4
09/28/2017	NBC	WILL & GRACE	4	...Th...	9:00 PM	122	7,669	4.8	8	2.1	8	2.8	8
							-53%	-51%	-49%	-58%	-53%	-56%	-52%
09/25/2018	FOX	GIFTED, THE	4	.Tu.....	8:00 PM	240	2,211	1.4	3	0.7	3	0.9	3
09/26/2017	FOX	LETHAL WEAPON	4	.Tu.....	8:00 PM	240	4,037	2.5	4	1.0	4	1.4	4
							-45%	-43%	-41%	-31%	-24%	-32%	-27%
09/24/2018	FOX	911	4	M......	9:00 PM	240	6,131	3.8	7	1.5	6	2.0	6
10/02/2017	FOX	GIFTED, THE	3	M......	9:00 PM	180	4,046	2.5	4	1.3	4	1.6	4
							52%	51%	59%	18%	33%	24%	37%
09/24/2018	FOX	RESIDENT, THE	4	M......	8:00 PM	240	4,843	3.1	5	1.0	4	1.4	4
10/02/2017	FOX	LUCIFER	3	M......	8:00 PM	180	3,479	2.2	4	1.0	4	1.3	4
							39%	39%	46%	5%	17%	7%	17%
10/12/2018	CW	DYNASTY	2	....F..	8:00 PM	120	630	0.4	1	0.2	1	0.2	1
10/13/2017	CW	CRAZY EX-GIRLFRIEND	2	....F..	8:00 PM	120	612	0.4	1	0.2	1	0.2	1
							3%	6%	10%	-14%	-6%	-15%	-9%
10/09/2018	CW	BLACK LIGHTNING	2	.Tu.....	9:00 PM	120	1,092	0.7	1	0.4	1	0.4	1
09/26/2017	CW	DCS LEGENDS OF	3	.Tu.....	9:00 PM	180	1,322	0.8	1	0.4	1	0.5	1
							-17%	-15%	-12%	-12%	-3%	-10%	-3%

Note: SWAT on CBS is a sophomore series, but not on the list with NFL THURSDAY NIGHT FOOTBALL as its year ago TP.

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ARE YOU READY FOR SOME PRIMETIME FOOTBALL?

- With all the talk of Football declining, NBC's SUNDAY NIGHT FOOTBALL has garnered slight increases over Fall 2017 total viewership in weeks two through six.

NBC SUNDAY NIGHT FOOTBALL: YEAR-TO-YEAR P2+ (000s) PERFORMANCE

Source: Nielsen NNTV, 9/9/18-10/21/18 vs 9/10/17-10/22/17, L+SD.
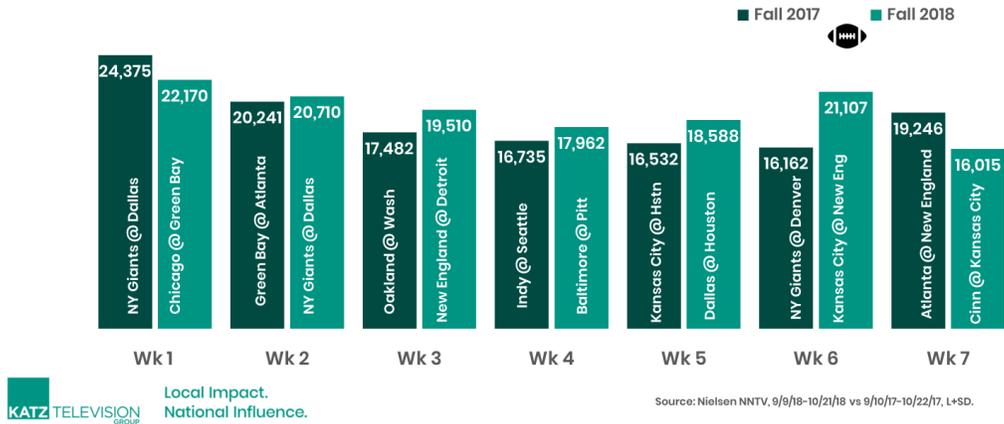
- The same does not necessarily hold true for the NFL in Primetime on FOX and the NFL Network, but ESPN also turned in a slight increase. On average, SNF has been up a consistent 4% in P2+ from last Fall's first seven games to this Fall's first seven games.
- ESPN's overall six-week average of the season so far for MONDAY NIGHT FOOTBALL was up 7% in P2+ from year ago. The first three games of the season registered losses, but MNF started garnering increases in weeks 4, 5 and 6.
- With only four weeks under its belt, FOX's THURSDAY NIGHT FOOTBALL turned in very slight declines over CBS' performance last Fall, -12% in total viewers.
- The NFL NETWORK's THURSDAY NIGHT FOOTBALL airings averaged a 9% down turn from year ago among P2+, posting a decline each week of this season, except for week 2.
- We'll keep an eye out as the season progresses to see if there are any significant changes.

NFL PRIMETIME FOOTBALL: YEAR-TO-YEAR P2+ (000s) PERFORMANCE

Source: Nielsen NNTV, 9/9/18-10/21/18 vs 9/10/17-10/22/17, P2+ Impressions, L+SD.
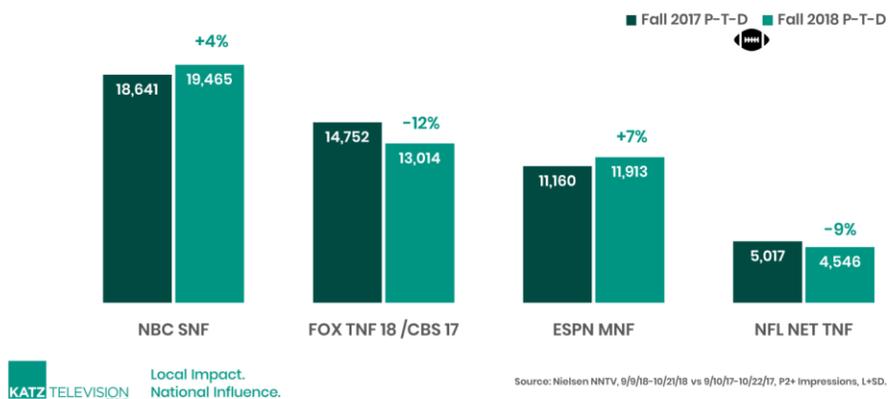
WHAT'S THE BUZZ?

The last big week of Network premieres debuted with ABC's highly anticipated Tuesday night line-up. The 1-2-3 punch of THE CONNERS, THE KIDS ARE ALRIGHT and THE ROOKIE looked promising on paper and with their promos, hence many viewers have quickly flocked to social media to watch and critique. Regardless of how these shows performed on Twitter and Facebook, one cannot deny the buzz ABC provided that led to a ton of virtual water cooler conversations.

FACEBOOK LIKES - All freshman series through week 4 of the new season
Note: Program order based on "Followers Gained"

Facebook Likes – New Shows	Likes Day of Episode	Likes Day After Episode	Followers Gained
The Conners	18,251	25,216	6,965
A Million Little Things	135,914	137,592	1,678
The Rookie	68,339	69,818	1,479
God Friended Me	59,048	60,009	961
Dancing-tars Juniors	18,538	19,458	920
The Kids Are Alright	16,849	17,769	920
Manifest	136,924	137,808	884
New Amsterdam	110,841	111,613	772
The Alec Baldwin Show	2,927	3,554	627
All American	5,178	5,633	455
Charmed	94,385	94,712	327
The Neighborhood	38,500	38,795	295
The Cool Kids	21,058	21,322	264
Murphy Brown	93,582	93,833	251
FBI	51,336	51,501	165
Happy Together	16,041	16,167	126
Single Parents	28,228	28,353	125
Magnum P.I.	56,339	56,428	89
Rel	11,998	12,040	42
I Feel Bad	9,422	9,458	36

TWITTER FOLLOWERS - All freshman series through week 4 of the new season
Note: Program order based on "Followers Gained."

Twitter Followers for New Shows	Followers Day of Episode	Followers Day After Episode	Followers Gained
The Conners	4,407	8,570	4,163
The Rookie	5,906	6,738	832
Manifest	31,969	32,412	443
All American	3,042	3,364	322
New Amsterdam	9,561	9,873	312
A Million Little Things	16,450	16,726	276
Dancing-Stars Juniors	7,373	7,642	269
The Kids	1,575	1,836	261
Happy Together	12,164	12,396	232
Alec Baldwin Show	1,882	2,076	194
Murphy Brown	16,925	17,114	189
God Friended Me	4,831	4,998	167
FBI	6,580	6,711	131
Last Man Standing	163,555	163,679	124
Charmed	16,598	16,682	84
Single Parents	3,466	3,537	71
Rel	2,512	2,554	42
The Cool Kids	2,386	2,427	41
I Feel Bad	1,730	1,748	18
The Neighborhood	2,873	2,876	3

Top 10 network series, new and returning for week 4, which posted the highest number of "Gained Likes" from the day of the premiere/and or air to the day after on Facebook….

Note: Program order based on "Likes Gained."

Top Facebook Like Increases	Likes Day Of Premiere	Likes Day After Premiere	Likes Gained
The Conners	18,251	25,216	6,965
Riverdale	1,974,441	1,978,015	3,574
The Voice	17,312,408	17,315,119	2,711
Million	135,914	137,592	1,678
The Rookie	68,339	69,818	1,479
This Is Us	3,832,338	3,833,535	1,197
God Friended Me	59,048	60,009	961
The Kids	16,849	17,769	920
Dancing with The Stars: Jr	18,538	19,458	920
Manifest	136,924	137,808	884

And for Twitter….

Top Twitter Like Increases	Likes Day of Premiere	Likes Day After Premiere	Likes Gained
The Conners	4,407	8,570	4,163
Riverdale	1,316,385	1,319,338	2,953
The Rookie	5,906	6,738	832
This Is Us	382,061	382,777	716
Manifest	31,969	32,412	443
Dancing with the Stars	1,081,004	1,081,364	360
All American	3,042	3,364	322
New Amsterdam	9,561	9,873	312
A Million Little Things	16,450	16,726	276
Dancing w/Stars Juniors	7,373	7,642	269

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

THE CONNERS RETURN MINUS ONE
Possibly the most anticipated show of this fall season was the spin-off of ROSEANNE, THE CONNERS…without Roseanne. THE CONNERS premiered on Tuesday, October 16th on ABC and viewers were eager to see just how the show would move on without Roseanne and how they would remove her character from the show. Curiosity got the better of viewers as THE CONNERS ratings were in line with those of the ROSEANNE finale. Fans were indifferent to the premiere, which gave us a wide spectrum of online conversation including comments from Roseanne herself.

- THE CONNERS had one of the biggest increases on social media of the Fall season gaining 4,163 Twitter followers and 6,965 Facebook Likes. It takes the win for biggest increase of any show this week.
  - *Keep in mind, due to the title change new Twitter and Facebook accounts were created as opposed to using the already established Roseanne Show account.*
- Vulture reported that, although Roseanne was no longer on the show, The Conners still shined and will probably stick around for a while.
  - *"The Conners also serves as a reminder that, while Roseanne was the show's center, she was always surrounded by a gifted ensemble."*
- Some fans really enjoyed the premiere and how they kept the show honest and funny. They also enjoyed the light that was shined on today's opioid epidemic.
  - *"Pleasantly surprised by how solid #TheConners is. John Goodman is doing a great job…can almost feel his pain. Still not the same without Roseanne…but I'll watch next week."*

> ➢ " I wasn't sure how **#TheConnors** would work without **@therealroseanne** but it turns out they really didn't need her afterall. Well done"
> ➢ "I laughed. I cried. I'm so Aunt Jackie in the kitchen. Loved the end of the episode tied into the original beginning. So well done! Congrats! #TheConners."
> ➢ "Wow, #TheConners was exactly what it should have been. Sad, touching, funny, familiar. It was very well written and I'm glad it's going to continue."
- On the other side, some were totally against the show's premiere as mostly conservative viewers stuck to their guns and refused to give the show a chance after the firing of Roseanne.
- Roseanne herself added to the conversation tweeting "I AINT DEAD B******" as the episode aired.
> ➢ "#TheConners Yeah I don't like it, Roseanne was the buffer that made all the other characters shine. This feels like sitting down to do a puzzle and finding out half the pieces are missing. Last time I'm watching."
> ➢ "I can't believe anyone would watch this show without Roseanne Barr. In the climate we live in today is really getting out of hand. Whatever happened to forgiveness I think we've all made mistakes #TheConners."
> ➢ **#TheConners**. Very sad and very pathetic. **@therealroseanne** WAS THE SHOW! John Goodman you sold out your friend Roseanne! Big Mistake **@THEsaragilbert** **@ABCNetwork**

THE KIDS ARE PRETTY GOOD
With another TV family stepping onto the scene, THE KIDS ARE ALRIGHT shined throughout its premiere. The decades-based show is set outside Los Angeles in the 1970s with viewers and critics saying it's a fresh new show that offers something more than washed-up premises. The show itself is based on the creator's own childhood so it offers a hint of authenticity and truth without trying to go over the top. Genuinely everyone had a pretty positive review of the new show.
- THE KIDS ARE ALRIGHT didn't fare as well on social as THE CONNERS. To be fair, THE KIDS ARE ALRIGHT also didn't already have a big name, instant recognition and built in promotion. On Twitter they gained 920 Facebook likes and only 261 new Twitter followers. In comparison, this is on par with low-performing show REL, which had a similar increase for its premiere, but continues to be one of lowest performing shows on social media.
> ➢ Most of the online chatter leaned positive and many saw this as a mashup of THE WONDER YEARS and MALCOLM IN THE MIDDLE.
> ➢ "The best of the fall season's new comedies from a network that's become well-practiced in turning back the clock and making shows like these tick" (Ed Bark- Uncle Barky)- from Rotten Tomatoes
> ➢ "The tumult, chaos, and divergent interests of these many brothers feels authentic, and so do the besieged parents who are trying to hold it all together with a modest paycheck and as much love as they can divide among eight boys" (Verne Gay- Newsday)- from Rotten Tomatoes
- There were some who felt the show fell flat.
> ➢ "I had high hopes for The Kids Are Alright, but unfortunately the writers don't know anything about the early 70s or Catholicism at that time."

THE NATHAN FILLION SHOW
The highly anticipated THE ROOKIE premiered this week and many viewers (especially middle-aged women) were ecstatic to Nathan Fillion back on TV after the departure of the beloved CASTLE. Many also complimented the cast ensemble and look forward to the rest of the season.
- ABC was hoping to up THE ROOKIE's social media presence as they had Nathan participate in a live Q&A on Twitter where users asked questions and the actor would respond with a short video. He also live-tweeted during the premiere, providing behind-the-scenes insights to the episode.
- These social campaigns didn't help the show as much as one would expect as it's increases were decent at best. The show gained 832 new Twitter followers and gained 1,479 new Facebook likes.
- Positive Social Media Response
> ➢ "Fillion grounds The Rookie with just enough wry humor and low-key charisma to lift the formula, and he gets yeoman support from a diverse ensemble of rookies, training officers and bosses." (Matt Roush- TV Insider)- From Rotten Tomatoes.
> ➢ "The opening episode is smartly written, with crisp dialogue, and it sure has charm. Fillion is enormously likeable here." (John Doyle- Globe and Mail)- from Rotten Tomatoes

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> *Just watched @therookie, and I was absolutely blown away. It's been a while since I've seen a new drama this solid.*

- Negative Social Media Response
  > *"It's not anything you haven't seen a number of times before." (Roger Catlin- rogercatlin.com)- from Rotten Tomatoes*
  > *"The Rookie seems destined to test the limits of Fillion's charm, in a show where the shaky imagery can't obscure that we've seen every beat here before." (Brian Lowry- CNN.com)- from Rotten Tomatoes*

OTHER MISCELLANEOUS SOCIAL NOTES:

- RIVERDALE continues to have the social media community on its side. If it weren't for the premiere of THE CONNERS it would be the top show gainer on both Facebook (3,574 new likes) and Twitter (2,953). Since its premiere on 10/9/18, the show has gained over 40,000 new Facebook likes and 30,000 followers on Twitter. Pretty impressive numbers. Of the new series, only MANIFEST has amassed over 30,000 followers on Twitter.
- First year series such as MAGNUM PI, THE NEIGHBORHOOD and I FEEL BAD continue to struggle to find an audience on social media. MAGNUM PI, for example, gained 0 followers after its new episode while THE NEIGHBORHOOD only gained 3 followers.
- Veteran shows such as LETHAL WEAPON, BIG BANG THEORY and HOW TO GET AWAY WITH MURDER seem to be teetering off on social as well, all losing followers and likes daily. LETHAL WEAPON has been getting a ton of negative responses from fans so it makes sense while the other two are simply on their last seasons, which leads to people feeling they no longer should follow a show that's about to end.

KTG Content Strategy / Katz Media Group
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