

# CABLE NATION: The 'Fall' Of Broadcast, Fall 2013 Primetime Analysis

# The 'Fall' of Broadcast

- Broadcast lost 11 million viewers in Fall during the last decade; 5 million in the last 5 years
- In 2012, Broadcast premiere week ratings hit a record low after 5 years of declines
- In Fall 2012, two out of three new original programs were cancelled
- Broadcast's premium priced returning programs were down double digits last fall – these returning programs comprise 71% of Fall's 2013 schedule
- In 2003, Broadcast programs that were cancelled averaged a 2.8 rating; In 2012, 96% of Broadcast programs earned below a 3.0 rating
- Broadcast's fall decline is among every age group and across every network

# The 'Fall' of Broadcast

## Broadcast Primetime C3 Ratings

Q4 2002 – Q4 2012

■ P18-49 ■ P25-54



Source: CAB analysis of Nielsen NPower AA%; C3 '07-'12 & Live '02-'06; Primetime; Broadcast 5 (ABC/CBS/NBC/Fox/CW) Total rtg

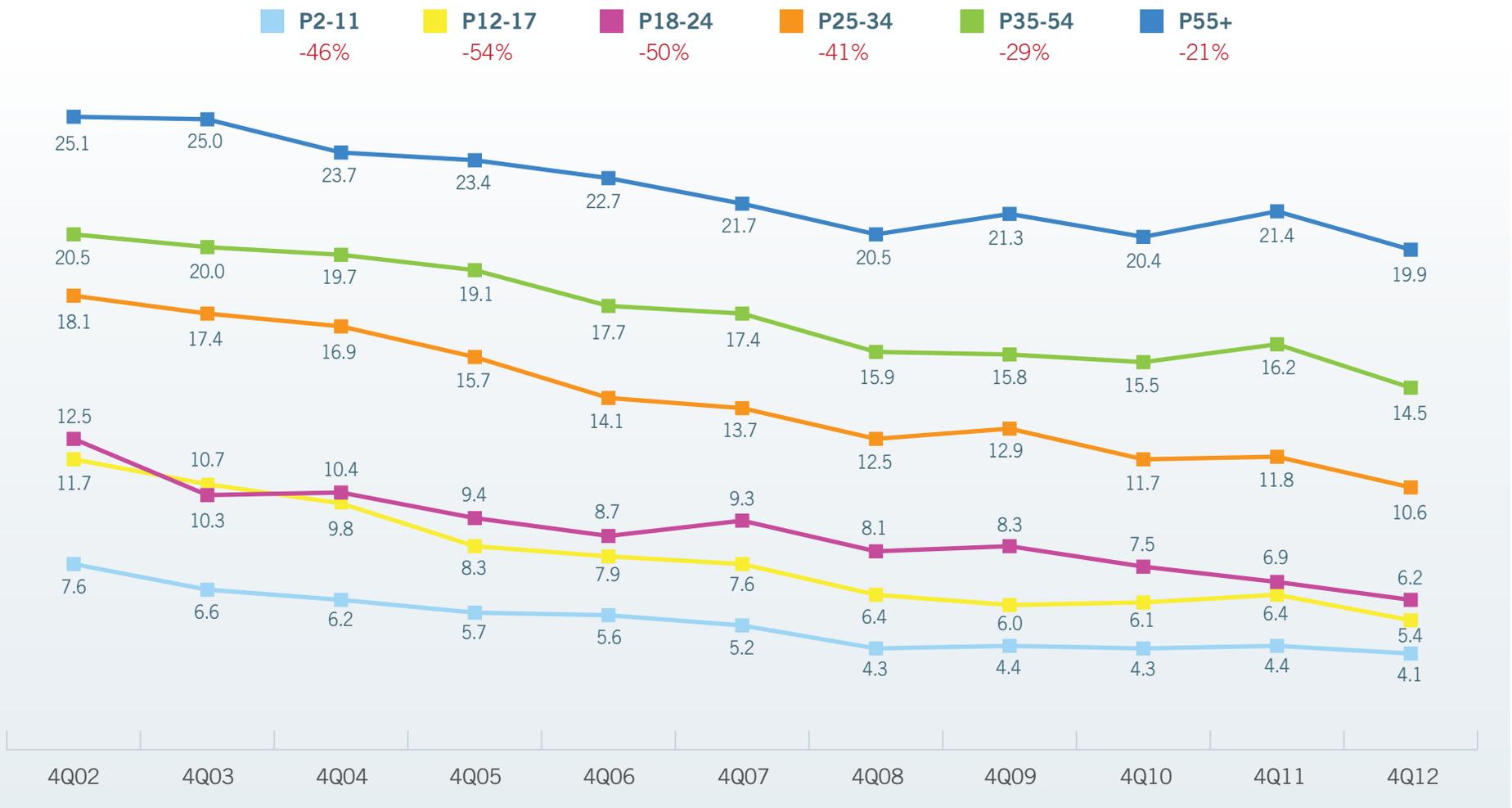
# Broadcast Lost 11 Million Viewers in Fall During The Last 10 Years; Ratings Down Double Digits

## Broadcast Primetime Q4 Ratings & Impressions

	Q402	Q407	Q412	5 Year Diff ('12 v '07)	10 Year Diff ('12 v '02)
<b>P18-49</b>					
Impressions (000)	22,971	16,324	11,766	-4,559	-11,205
Ratings (C3)	17.9	14.1	11.0	-22%	-39%
<b>P25-54</b>					
Impressions (000)	23,794	17,717	13,336	-4,380	-10,458
Ratings (C3)	19.8	16.2	13.2	-19%	-33%

# Among Every Age Group, Broadcast is Down in Fall Primetime

## Broadcast Primetime C3 Ratings



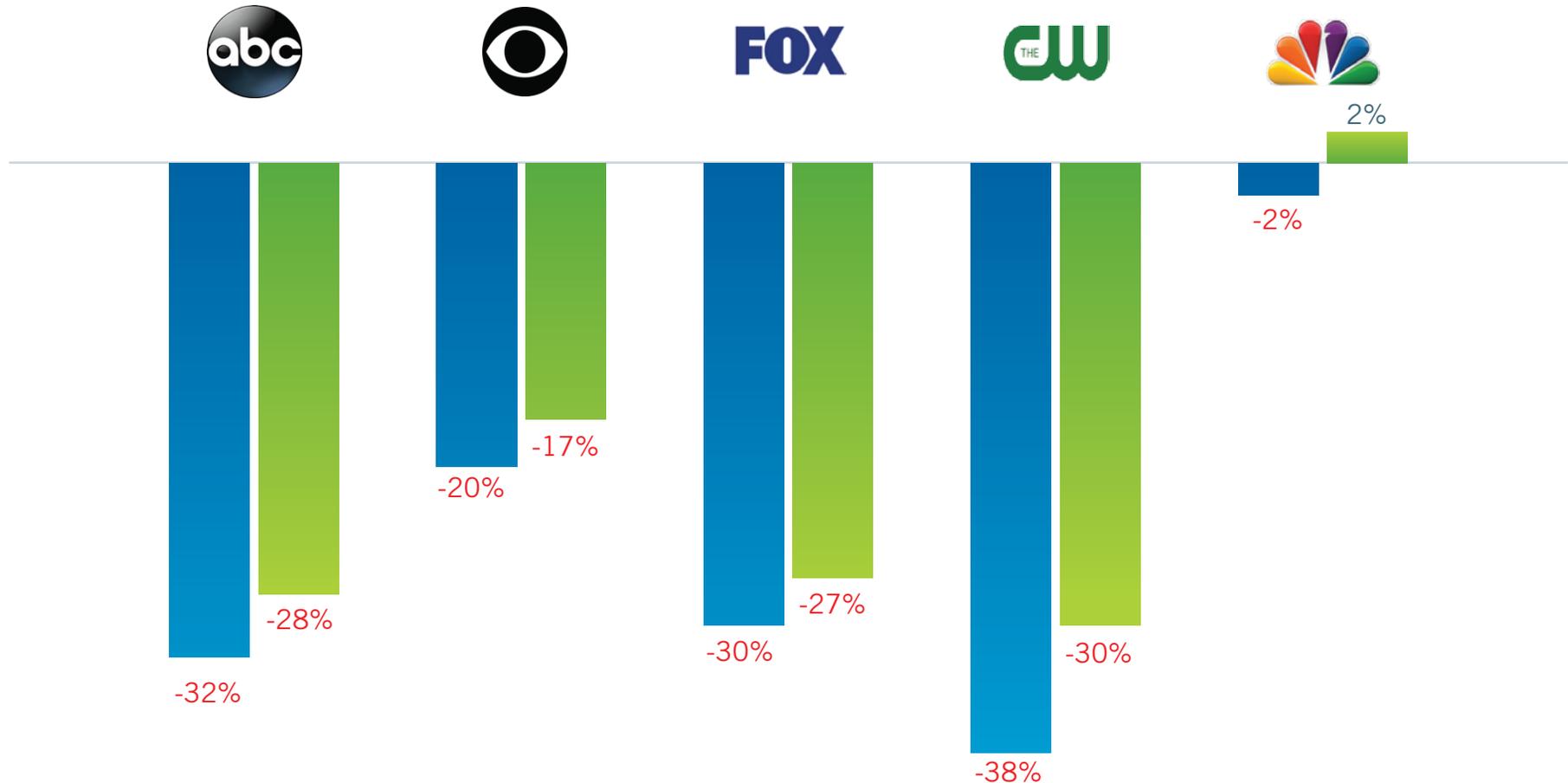
Source: CAB analysis of Nielsen NPower C3 total AA% '07-'12 & live for '02-'06; primetime; Broadcast 5 total rtg; % change v 10 years ago

# Broadcasts' Fall Struggles Are Driven By All Networks; NBC is Only Network Not Down Double Digits

## Broadcast Primetime C3 Ratings

4Q12 v. 4Q07

■ P18-49 ■ P25-54



Source: CAB analysis of Nielsen NPower C3 AA%; primetime; Broadcast 5 total rtg

# Broadcast Premiere Week Hit a Record Low in Fall 2012, After 5 Years of Declines – A Trend We Expect To Continue In The New Season

## Broadcast Primetime Premiere Week Ratings & Impressions

	A18-49 Imp(000)		A18-49 Ratings	
9/25/07	18,014		15.8	
9/22/08	17,464		15.3	
9/21/09	16,348		14.9	
9/20/10	15,417		14.2	
9/19/11	15,485		14.7	
9/24/12	12,724		12.1	
		<b>-5.3 Million Viewers</b>		<b>23%</b>

# In Fall 2012, Broadcast Launched 19 New, Original Programs – of Which 2 out of 3 Were Cancelled



**In Fall of 2013,  
A Third Of Broadcasts'  
Schedule Will Consist  
of New Original Shows –  
How Many Will  
Be Cancelled?**

# Returning Programs Comprise Virtually Three-Quarters of Broadcasts' Fall 2013 Schedule; Majority of These Premium Priced Returning Programs Are Down Double Digits



-39%



-30%



-13%



-10%



-9%



-10%



-8%



-8%



-6%



-10%



-31%



-23%



-19%



-15%



-17%



-35%



-31%



-23%



-23%



-18%

# In 2003, Broadcast Programs That Were Cancelled Averaged a 2.8 Rating; in 2012, 96% of Broadcast Programs Earned Below a 3.0 Among A18-49

**In 2003, A Broadcast Program With a 2.8 Rating Among A18-49 Got Cancelled**

**# of Cancelled Programs: 17**

**Avg Rating of Cancelled Programs: 2.8**

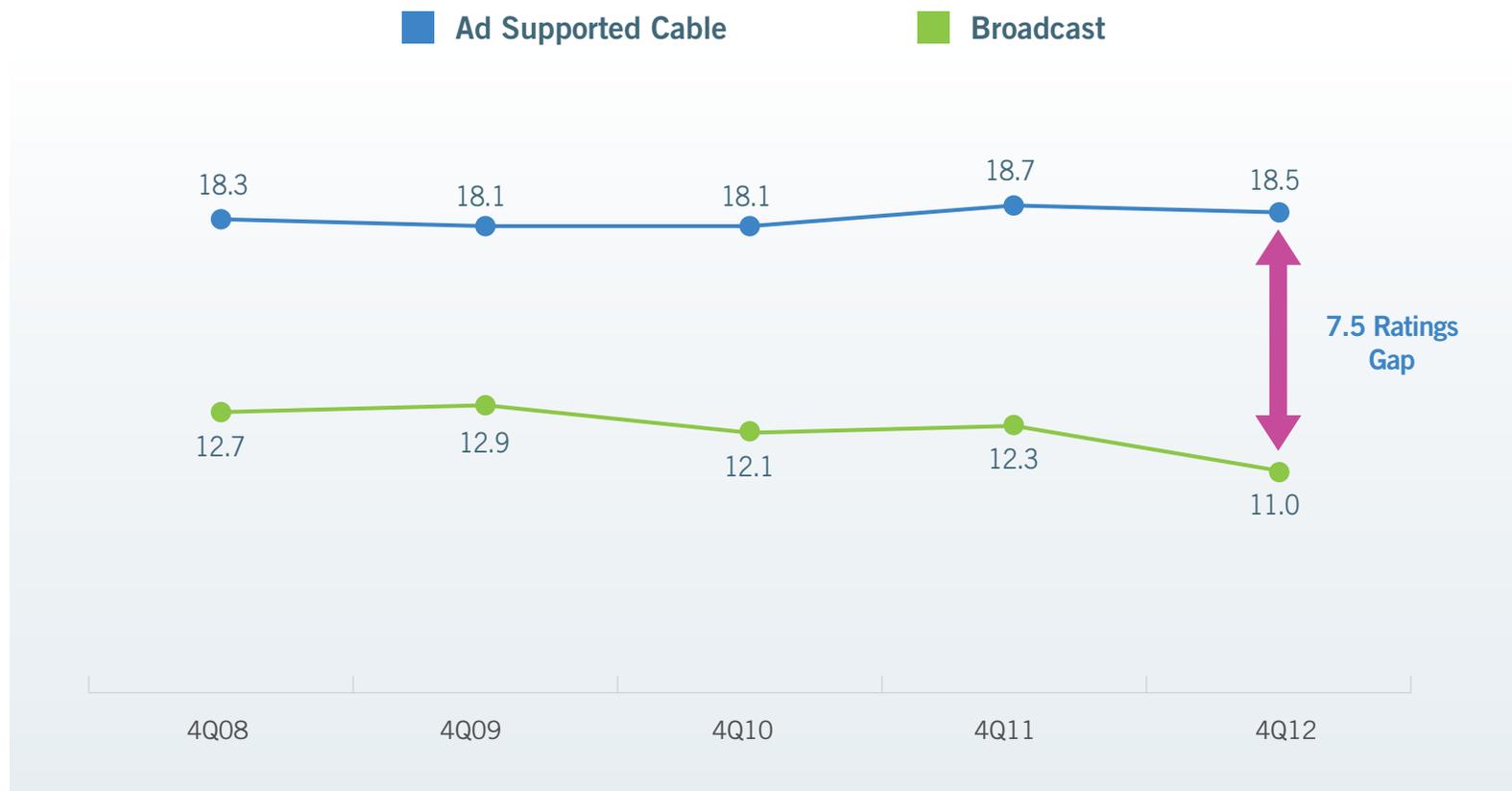
**Today, Majority Of Broadcast Programs Deliver Below a 3.0 Rating Among A18-49**

## 4Q12 Rating Classifications

A18-19 Rtg Range	# of Programs	Share
7.0+	1	1%
4.0-6.0	4	3%
0-3.0	119	96%
Total	124	

# Ad-Supported Cable Delivers Consistent Ratings Year After Year, Generating a Large Ratings Gap With Broadcast - a Gap We Expect To Continue in Fall 2013

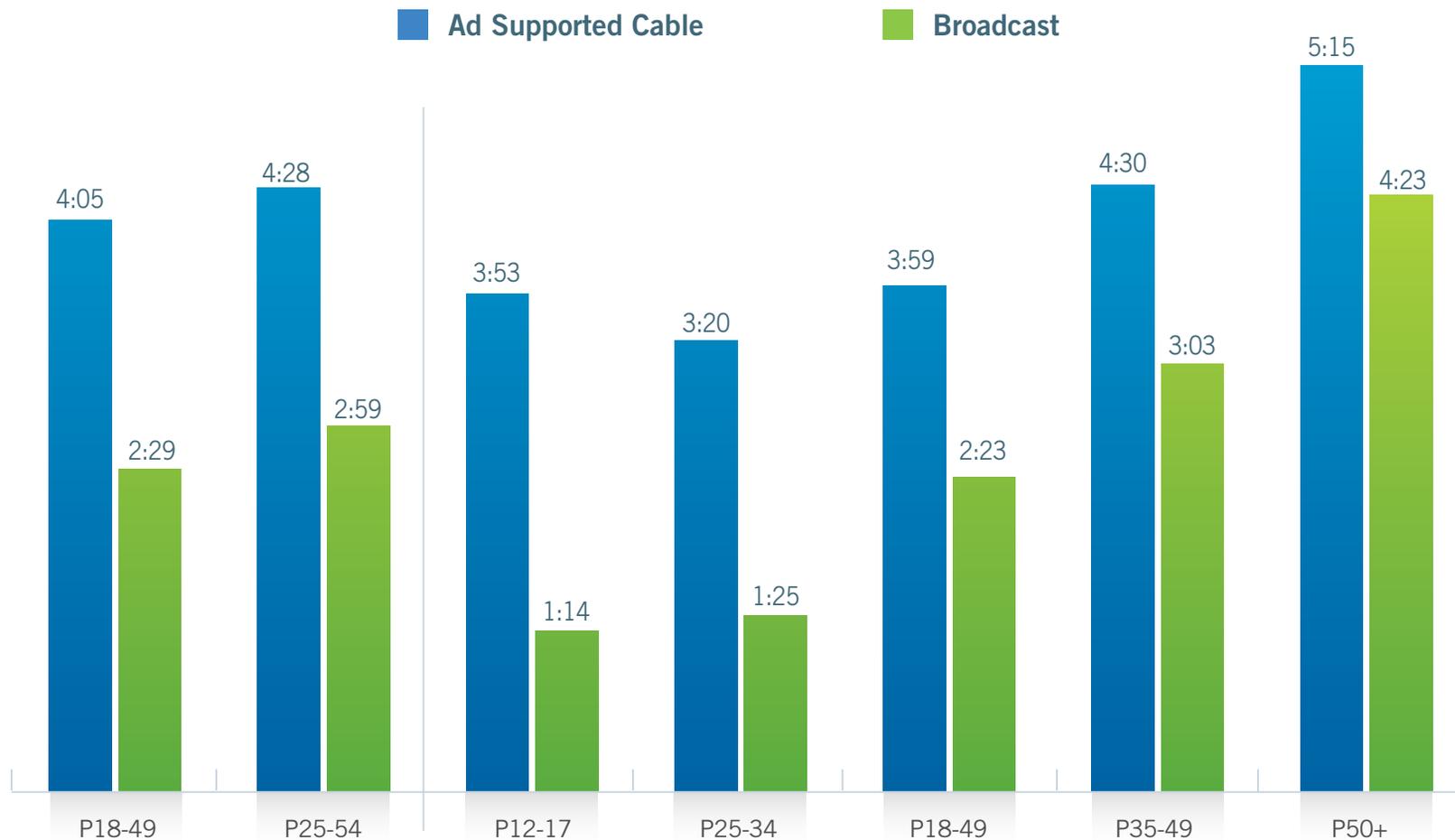
## A18-49 Primetime C3 Ratings



Source: CAB analysis of Nielsen NPower C3 AA%; primetime;A18-49; Broadcast 5 (Big 4+CW)

# In The New Season, Cable Will Continue To Command Significantly More Time in Primetime Across The Board

Time Spent In Avg Week (Hours:Min): Primetime



Source: CAB analysis of Nielsen NPower C3 AA%, Primetime; Broadcast 6; 4Q12



# CableNation

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**Sean Cunningham**

President & CEO

212-508-1223

[seanc@cabletvadbureau.com](mailto:seanc@cabletvadbureau.com)

**Danielle DeLauro**

SVP Strategic Sales Insights

212-508-1239

[danielled@cabletvadbureau.com](mailto:danielled@cabletvadbureau.com)

**Jason Wiese**

VP Strategic Insights

212-508-1219

[jasonw@cabletvadbureau.com](mailto:jasonw@cabletvadbureau.com)

**Evelyn Skurkovich**

Sr. Director, Strategic Insights

212-508-1220

[evelyns@cabletvadbureau.com](mailto:evelyns@cabletvadbureau.com)

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