



CABLE NATION: Summer of Cable

Cable TV's Summer Advantage Is Driven by It's Stability, Consistency, Quality, Variety and Socialability

Stability

- Monthly cable A25-54 ratings remain consistent while Broadcast drops off 25% from May to June
- Over the last five years, **cable ratings have increased +4%** while broadcast declined -16% against A25-54
- Repeats dominate the broadcast TV landscape, but A18-49 ratings are down for almost 70% of programming vs. YAG

Consistency

- Cable provides new content **everyday** of the summer with 60+ new series launches over 35+ networks coupled with the breadth of returning shows
- Broadcast networks will launch 15 new original series which accounts for only 16% of total broadcast programming
- With only one new series renewal from last summer, many broadcast shows are “here today, gone tomorrow”

Quality & Variety

- Majority of new broadcast programming remains reality-focused while cable offers a wide variety across genres highlighted by 20+ returning dramas

Socialability

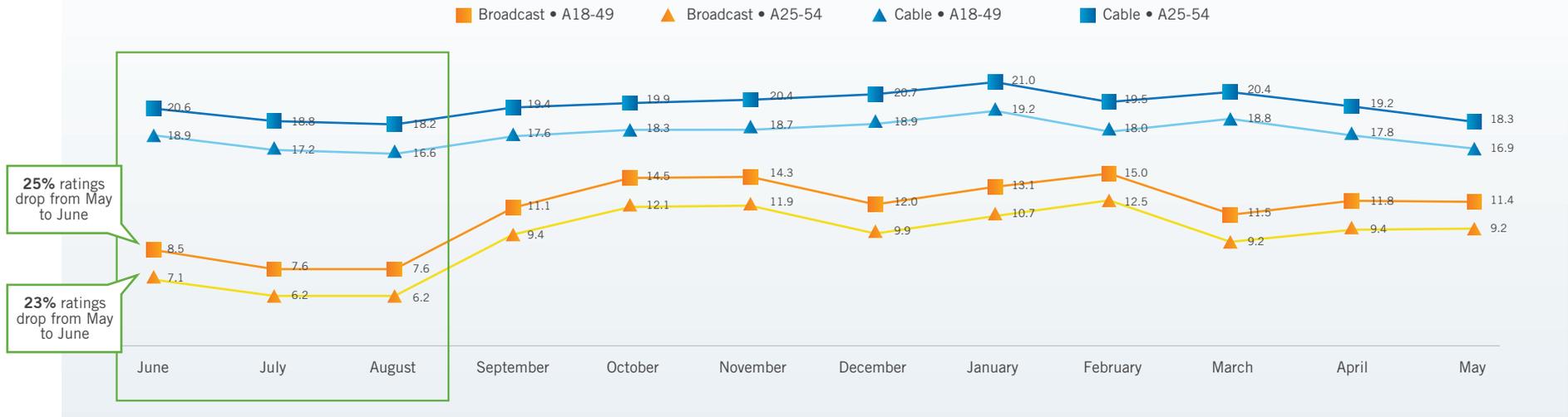
- So far this summer, **9 out of the top 10** most buzzed-about original series premieres are cable programs

Source: Nielsen Npower; June '12 – May '13; excludes the Olympics; Nielsen Npower; 5/28 – 9/23/12 vs. same period in 2008; excludes the Olympics; Nielsen Npower; 5/27 – 6/16/13, Live+SD Primetime (excluding sports)

Source: FutonCritic.com/TV.com; Trendrr; based off of all series premiere episodes between 5/27/13 – 6/18/13

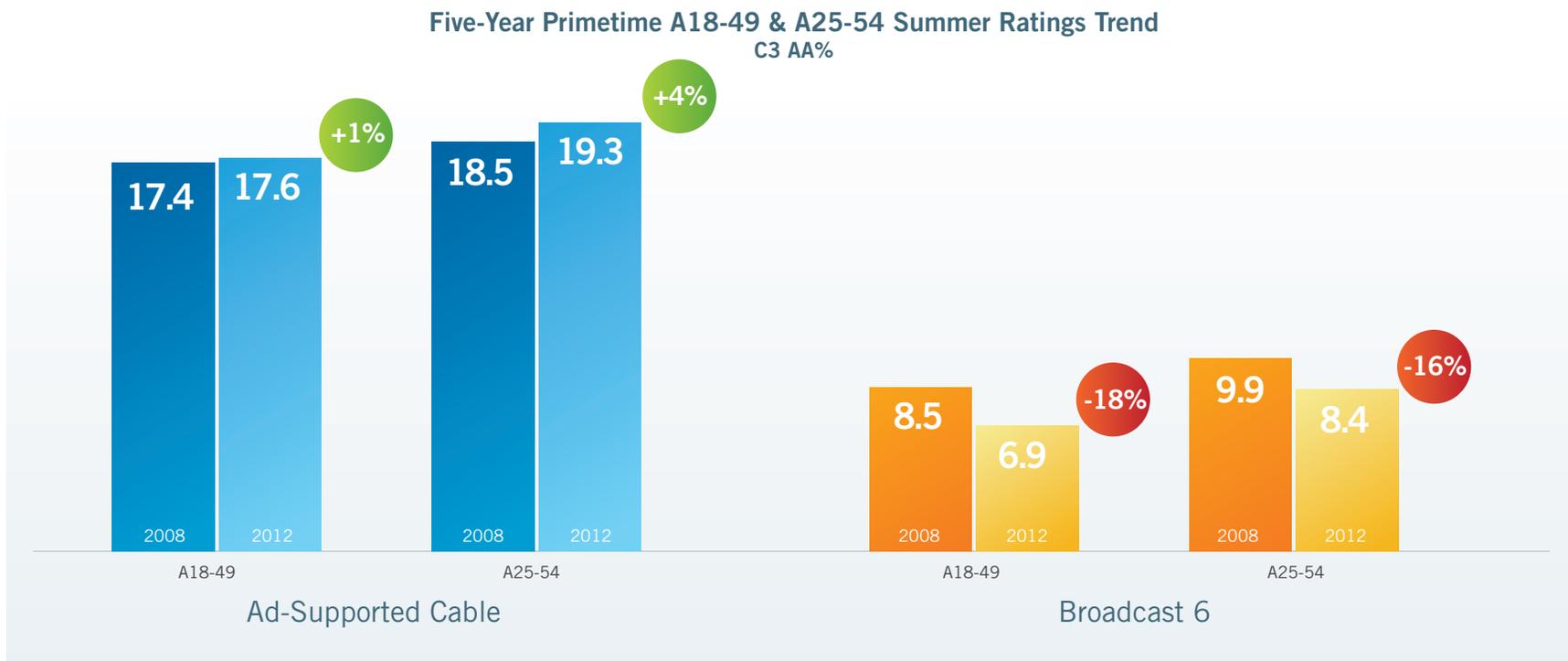
Cable Ratings Remain Relatively Consistent Throughout The Year While Broadcast Experiences A Significant Dip During The Summer Months

June '12 – May '13 Primetime A18-49 & A25-54 Monthly Ratings
C3 AA%



Source: Nielsen Npower; June '12 – May '13; excludes the Olympics

Over The Last Five Years, Cable Ratings Have Increased During The Summer While Broadcast Is Down Double-Digits



Source: Nielsen Npower; 5/28 – 9/23/12 vs. same period in 2008; excludes the Olympics

In Summer 2012, Broadcast TV Networks Launched 10 Original Programs, Almost All Reality-Based, And Only **One** Was Renewed



Source: FutonCritic.com/TV.com; (date) = premiere episode launch date

Repeats Dominate The Summer 2013 Broadcast Network Schedules, But Almost 70% Of Programming Is Down vs. YAG



(7)



(15)



(1)



(4)



(2)

Programs With Biggest Declines



(-21%)



(-55%)



(-11%)



(-10%)



(-32%)



(-13%)



(-54%)



(-6%)



(-12%)



(-11%)



(-32%)



(-5%)



(-10%)



(-29%)



(-9%)



(-24%)



(-22%)



(-21%)



(-20%)

Source: Nielsen Npower; 5/27 – 6/16/13, Live+SD Primetime (excluding sports)

(-xx%) = A18-49 rating % decline vs. YAG

Broadcast Networks Are Now Investing More Resources Into Original Summer Programming To Try To Combat Continuous Ratings Erosion

Big Four TV Networks No Longer Sitting Out the Summer

Led by CBS with 'Under the Dome,' broadcasters making big bet on recapturing viewers

CBS' ambitious series "Under the Dome" is leading the charge among the broadcasters to recapture viewers and advertising dollars that have fled to cable during the summer months. But with audiences accustomed to the Big Four's traditional off-season lineup of reality programming, series burn-offs and reruns — and many viewers forgoing the tube for sunshine — is this the start of a new wave or the beginnings of another washout?

SEE MORE: From the April 30, 2013 issue of *Variety*

If a small plane crashes into an invisible barrier during one of broadcast-TV's most ratings-challenged times of year, does it make a sound?

The major broadcast networks certainly hope it does this summer. An airplane crash and the resulting havoc it creates will be front and center of CBS' much-anticipated summer event-series "Under the Dome," which bows June 24. The drama, based on the Stephen King tome about a small town that is suddenly trapped underneath an invisible barrier, represents the first eye-popping shot in what looks to be a summer-long salvo from the Eye and its counterparts as they attempt what may at this point be impossible: taking back the summer from cable competitors.

The Big Four nets are investing more money and promotional resources for original programming in the summer frame this year than they have in more than a decade. The goal is twofold: to grab more advertising dollars in the off-season and, just as important, to prevent ratings from dropping to anemic levels.

SUMMER'S TV DROUGHT IS OVER

The shows you'll want to watch.

For television addicts, specifically those who pride themselves on having taste more *Homeland* than *Honey Boo Boo*, summer is no longer a season of mourning. For decades, nail-biting cliffhangers, teased with big promotional campaigns, have been the seasonal signoff each May, indicating a months-long summer absence of quality TV that leaves viewers with little more than repeats, low-budget reality shows, and series deemed not good enough for the fall. In other words, says TV historian and former Lifetime and USA Network executive Tim Brooks, they hang a sign letting viewers know that they've "gone fishing."

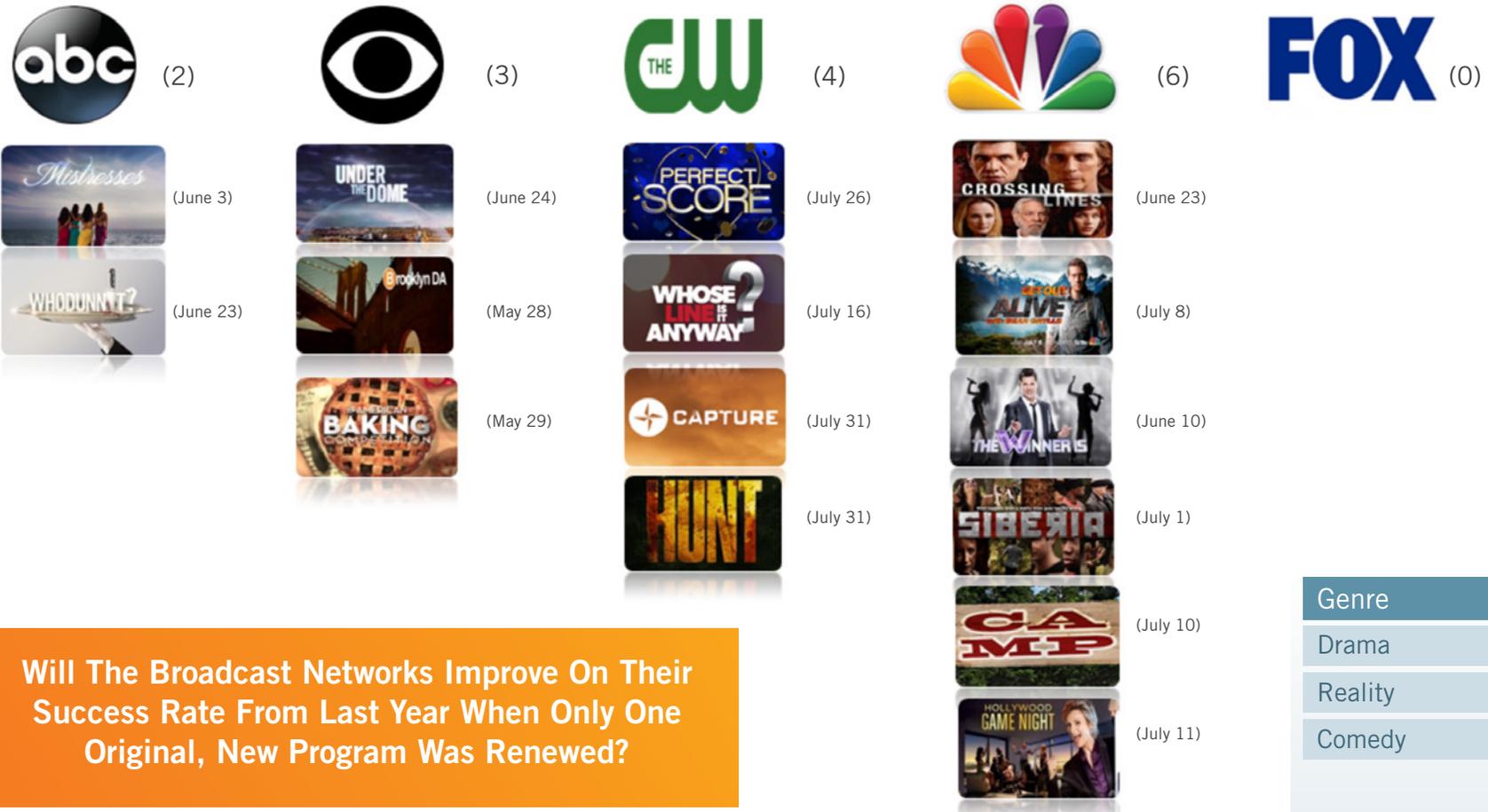
Now the networks seem to be rescheduling those trips. Jumping on a trend that cable channels like USA, Showtime, and TNT have been capitalizing on for years, broadcast networks are abandoning the idea that it's OK to take a summer vacation from quality programming. CBS is launching one of its most ambitious summer slates yet, led by the heavily promoted series adaptation of the Stephen King sci-fi novel *Under the Dome*, premiering June 24, and the resurrection of once-canceled procedural *Unforgettable*, returning July 28. NBC is debuting the crime drama *Crossing Lines* on June 23, and also plans to roll out the dramedy *Camp* on July 10. ABC, meanwhile, is throwing its muscle behind the debut of the primetime soap *Mistresses*, while cop drama *Rookie Blue* is already airing its fourth season. Add those network series to the stable of hit cable shows returning this summer—Showtime's *Dexter*, HBO's *True Blood*, AMC's *Breaking Bad*, USA's *Burn Notice*—and it's clear that summer no longer signals a drought of quality television. This may, in fact, be in the golden age of summer TV.



USA
Malibu-set FBI drama 'Crossing Lines' is right at home on USA.

While Original Programming Has Increased Slightly On Broadcast Networks In Summer 2013, Reality Is Still The Top Genre

Only 16% of summer programming across the broadcast networks is new, original content



Original Cable TV Programs Are Garnering Much More Social Buzz Than Broadcast TV During The Summer

Social TV Buzz vs. Original Summertime Programming

9 of the top 10 buzzed about original series premieres are *Cable Programs*

Rank	Program	Network	Social Mentions
1	The Wanted Life	E!	583,352
2	Bad Girls All Star Battle	Oxygen	159,444
3	The Fosters	ABC Family	156,448
4	The Hero	TNT	100,322
5	The American Baking Comp	CBS	85,908
6	The Haves and the Have Nots	OWN	74,692
7	Twisted	ABC Family	72,129
8	Graceland	USA	70,696
9	Love thy Neighbor	OWN	65,918
10	Marriage Boot Camp: Bridezillas	WE tv	57,748

Rank	Program	Network	Social Mentions
11	Mistresses	ABC	46,348
12	The Winner Is	NBC	36,255
13	Pretty Wicked Moms	Lifetime	26,351
14	Hit the Floor	VH1	24,231
15	Pregnant & Dating	WE tv	15,520
16	Princesses: Long Island	Bravo	14,858
17	Beverly Hills Pawn	Reelz	14,246
18	Golden Sisters	OWN	11,375
19	72 Hours	TNT	11,305
20	Swamp Murders	ID	10,431



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