



# Network Changes At 10PM: Opportunity For A Fresh Look

High ratings, younger skewing programs, better efficiency and superior commercial delivery in DVR households makes syndication the ideal alternative to network prime at 10P

 **CBS** TELEVISION  
DISTRIBUTION

 **Disney** \* **abc**  
DOMESTIC  
TELEVISION

 **NBC**  **UNIVERSAL**  
TELEVISION DISTRIBUTION



# Network Changes At 10PM: Opportunity For A Fresh Look

**"This is... a proactive, exciting attempt to change the model."**

Jeff Zucker, CEO, NBC UNIVERSAL on Jay Leno's move to 10PM

**"For NBC, probably a very good move [Leno's primetime move]. For us, it wouldn't be a good move. We are winning four of five nights at 10 p.m."**

Les Moonves, CEO, CBS Corp. on NBC's decision

**"It's a different audience [Leno's primetime show], I think it's an older audience ... We think it's an opportunity that throws up audience for CBS and ourselves."**

Steve McPherson, ABC Entertainment President, on Jay Leno's new show



<http://www.portfolio.com/views/blogs/mixed-media/2009/03/18/zucker-defends-cramer-olbermann-leno-move>

<http://www.thrfeed.com/2008/12/moonves-on-nbcs.html>

[http://www.hollywoodreporter.com/hr/content\\_display/news/e3ie1ce596d1213e2c26044d4eacd859f42?imw=Y](http://www.hollywoodreporter.com/hr/content_display/news/e3ie1ce596d1213e2c26044d4eacd859f42?imw=Y)




# Executive Summary

- Each weekday, syndication has **higher rated shows than Network Prime at 10P**
- Top syndication has **comparable ratings to current ABC and NBC Prime** during the 10P-11P time period
  - Higher rated than projections for the new prime Leno show
- Syndicated shows are **younger than ABC, CBS and NBC 10P Prime**
- Top syndication is **more efficient than the three networks at 10P Prime**
- Top syndication has **superior commercial delivery in DVR households**



# Syndication Has More Top Shows Daily

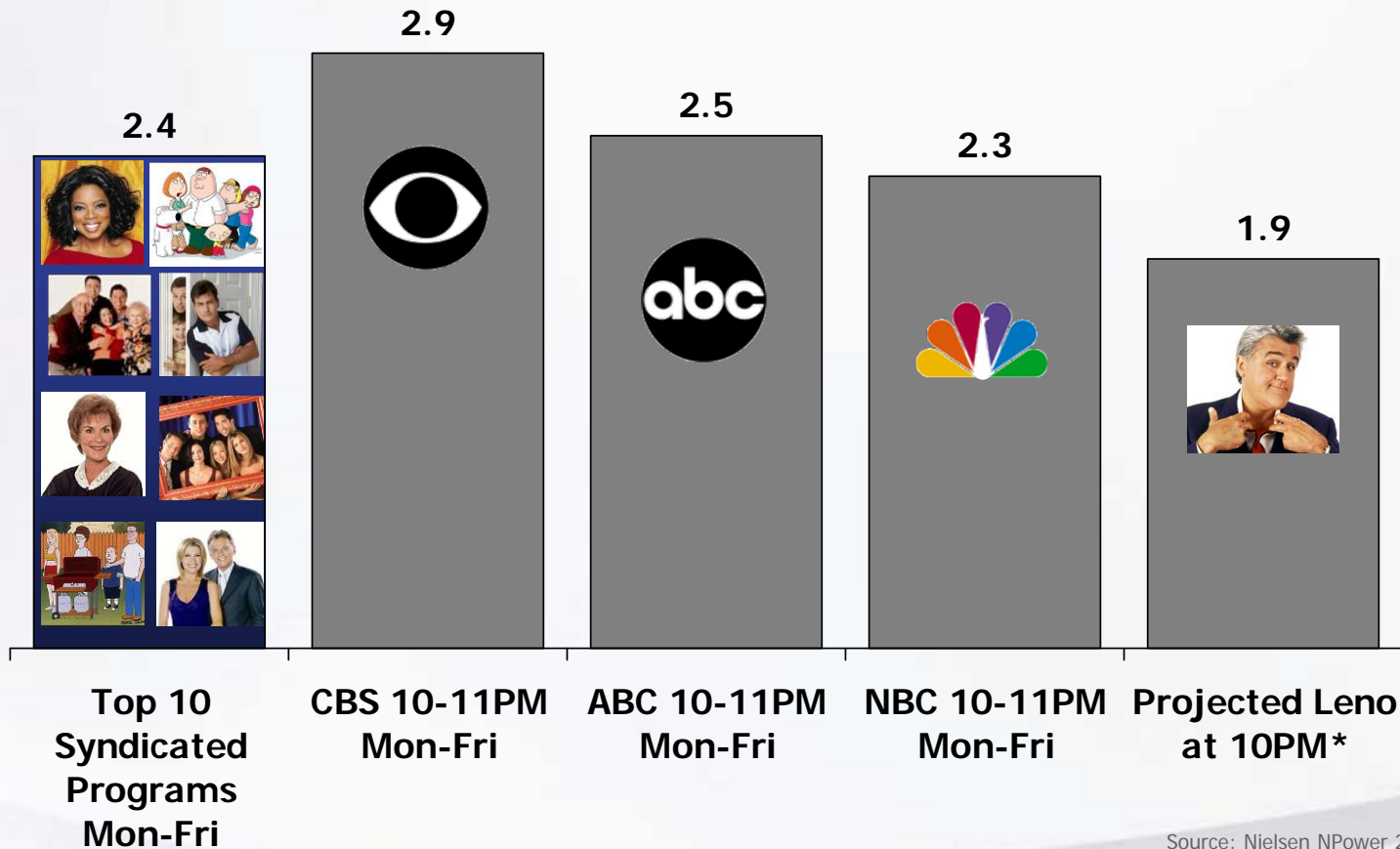
## # Of Syndicated Programs With Higher Ratings

| Syndication vs.   | Monday | Tuesday | Wednesday | Thursday | Friday |
|---|--------|---------|-----------|----------|--------|
|  10-11PM  | 2      | 9       | 13        | 4        | 9      |
|  10-11PM  | 1      | 6       | 2         | 2        | 4      |
|  10-11PM | 6      | 2       | 8         | 2        | 14     |



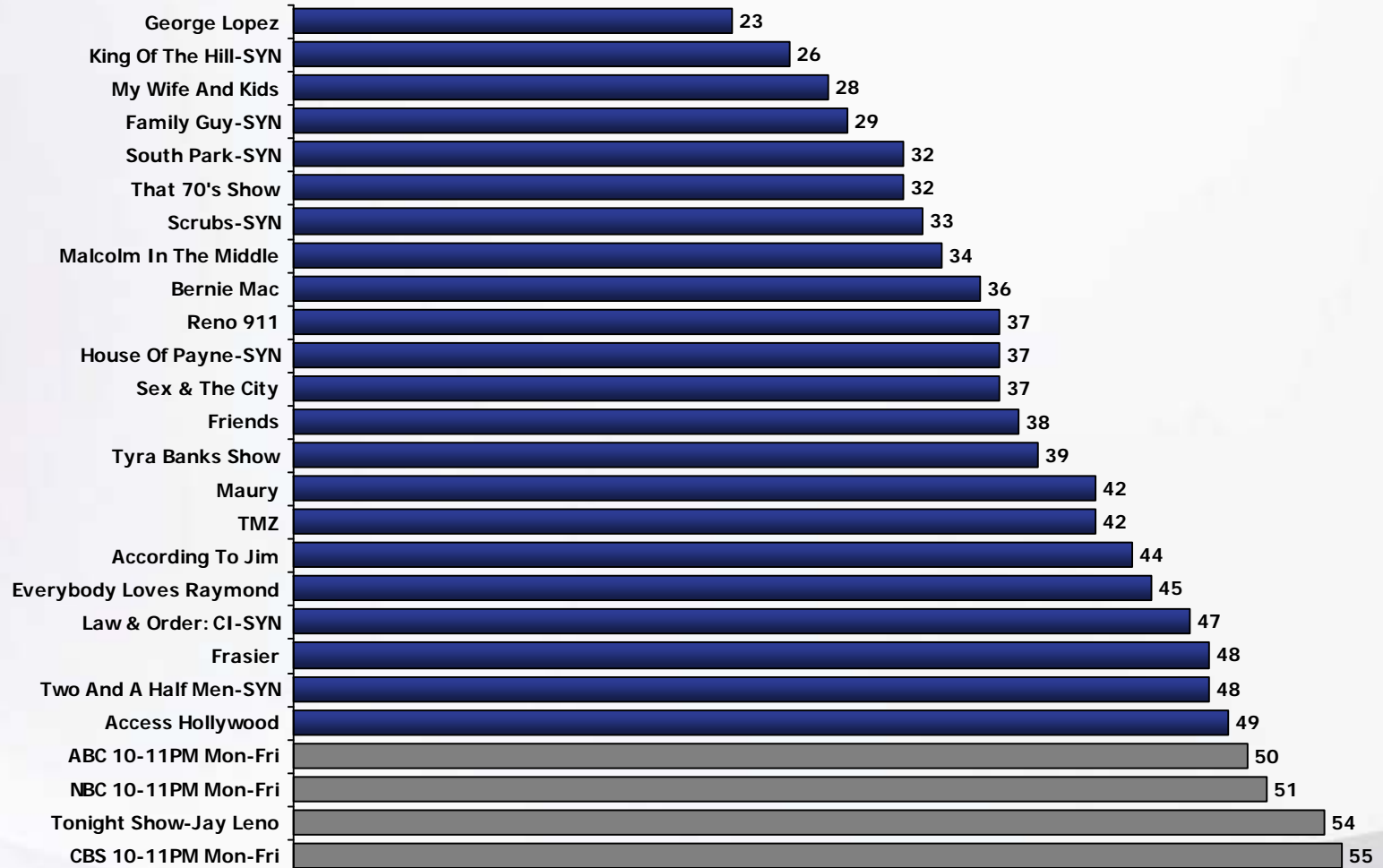
# Top Syndication Competitive To ABC & NBC

## Average A18-49 C3 Rating



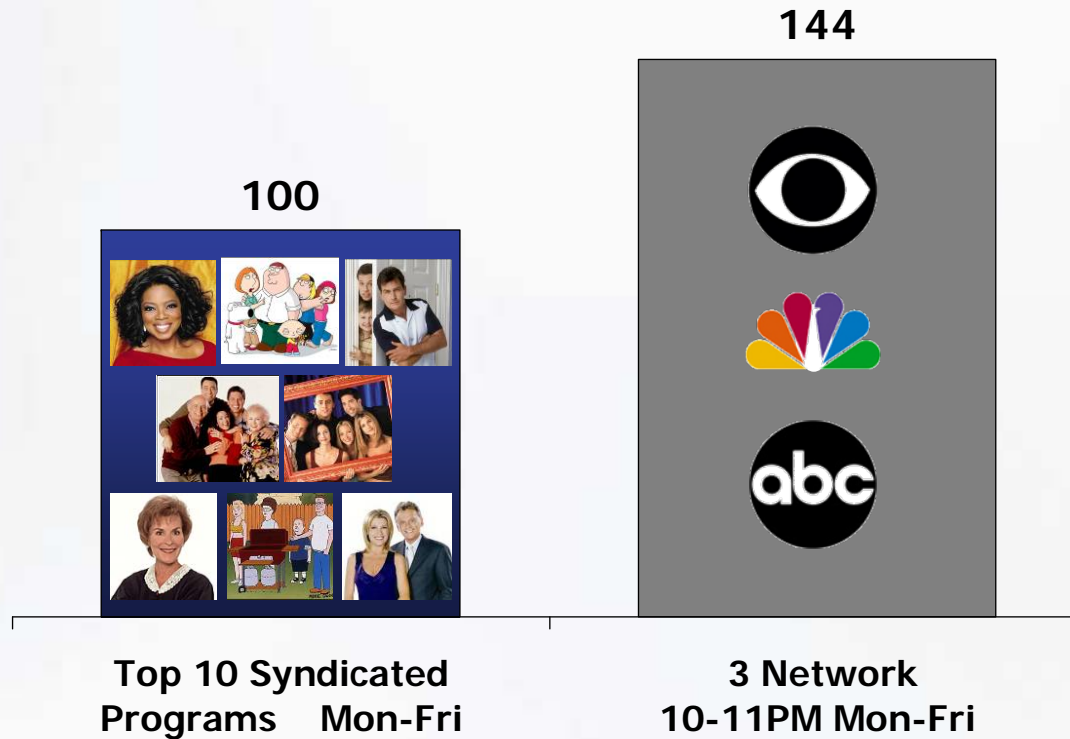
# Syndication: Younger Than The Networks

## Median Age



# Syndication: More Efficient Than 10P Prime

## CPM Index A18-49



# TiVo Research: The 10pm Timeslot Is “Getting Squeezed From Both Sides”

*“Much of the Timeshifted viewing from the 8pm and 9pm airings stomps out the audience that would historically watch 10pm programming in Live mode.”*

*“While some viewers will record programs aired at 10pm for viewing later in the week, many are abandoning that hour of television altogether.”*



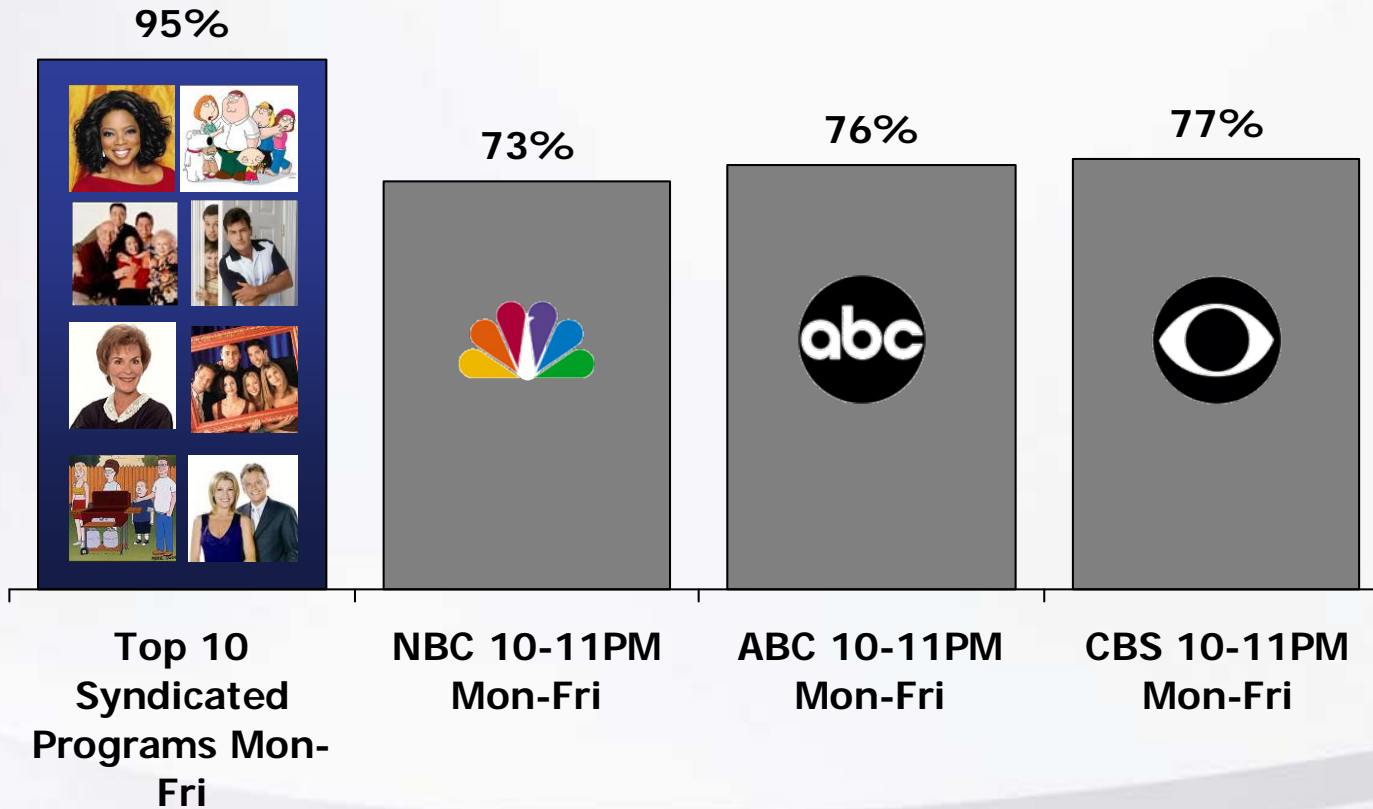
Todd Juenger  
Vice President & General Manager  
TiVo Audience Research & Measurement



# Superior Commercial Delivery In DVR Homes

## C3 Rating to Program Rating

Adult 18-49 in DVR HH's



# Syndication: The Alternative Executive Summary

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**Syndicated Television:**  
*Real Value, Real Delivery*