

Fall 2011 Preview



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First, a Brief Introduction...

Who are we at Nielsen Entertainment Television (NETV)?

- We conduct program testing in our nationwide network of malls as well as Las Vegas for four of the five major broadcast networks
- We also test for three of the six major studios, as well as virtually all of the major “families” of cable networks
- Besides programs, we also test promos, trailers, print ads, concepts, titles, talent and a whole lot more
- Our capabilities go beyond creative testing; we also partner with other Nielsen divisions to conduct primary research for television clients such as ad sales studies, awareness and brand health tracking, segmentation and consumer lifestyle studies
- Our breadth and depth of work with TV clients give us an up-close look into each new TV season and the most notable trends, face-offs and potential successes

What did we see in 2011?

Overview

Coming into pilot season...

- CBS needed to add a few new comedies and procedurals with uncertainty surrounding 2.5 MEN and the future of the CSI franchise
- ABC needed a LOT of new product to eventually replace aging hits like GREY'S and DESPERATE HOUSEWIVES, and provide some male balance
- NBC needed almost a complete reboot; the only new hit in years has been THE VOICE
- Fox needed a live-action comedy hit, and a drama or two to replace “bubble shows” like CHICAGO CODE and LIE TO ME
- CW needed a strong companion for VAMPIRE DIARIES, some new dramas to eventually take over for 90210 and GOSSIP GIRL, and a new reality show to carry the torch for TOP MODEL

How did they do?...

The Results

Arguably the strongest pilot season in years...

- CBS found two particularly strong “procedurals with a twist,” and a promising new comedy to bolster Monday nights
- ABC hit a “home run” with dramas, picking up a boatload of promising new shows for fall and midseason
- NBC found some appealing comedies and dramas, but scheduling is going to be an issue when the competition is intense and every night needs work
- Fox found a great live-action comedy to bolster Tuesday nights, and otherwise doesn’t need much with X-FACTOR and TERRA NOVA on tap for fall
- CW found a great VAMPIRE companion; two other promising dramas (one developed by CBS!), and a buzzworthy reality show

What were some of the trends?...

Trend #1: The Year of the Woman!

- Female-skewing comedies: THE NEW GIRL, 2 BROKE GIRLS, WHITNEY, UP ALL NIGHT, VODKA, I HATE MY TEENAGE DAUGHTER...many with female creators (Whitney Cummings, Chelsea Handler, Emily Spivey, etc.)
- Female-led dramas: PAN AM, CHARLIE'S ANGELS, REVENGE, ONCE UPON A TIME, SMASH, PRIME SUSPECT, RINGER, UNFORGETTABLE, SECRET CIRCLE, HART OF DIXIE
- Why? #1) Female comics are "hot" ...look at BRIDESMAIDS, Tina Fey, Amy Poehler, Chelsea Handler, Whitney Cummings, etc. After years of male-driven comedy (RAYMOND, KING OF QUEENS, 2.5 MEN, THE OFFICE, EARL), it's time for a change.
- #2) TV is ultimately a female-driven medium (usually about 60/40), and guys are tough to reach outside of sports and action (both \$\$\$), so this is a no-brainer way to "connect with the core."



Trend #2: Make Me Laugh!

- Over the past decade, dramas and reality shows ruled the roost, while networks failed to launch any smash hit comedies, other than 2.5 MEN
- However, inspired by the success of MODERN FAMILY, and CBS' Chuck Lorre four-camera sitcoms, networks made comedies a priority this year
- The result? Every network is adding more comedies, with ABC opening up a Tue comedy block, NBC a Wed block, Fox a four-comedy block midseason on Tue, and CBS a Sat comedy block (!).
- Why? The pendulum always swings, and now procedurals and serials are getting a little long in the tooth, so people are ready to laugh again. Plus, during hard times, people need a little mindless entertainment.



Trend #3: What's Your Fantasy?

- For awhile (c. 2005-2006), networks tried to replicate the success of LOST with their own serialized, supernatural hours
- However, most of these failed, and then the economy turned bad, so networks went back to doing more self-contained procedurals
- Viewers appear to be a little burned out on these, though, and a better economy (plus new online platforms and the increased importance of international sales) are encouraging networks to get more creative with their hours
- The result? Programs inspired by fairy tales (GRIMM, ONCE UPON A TIME)...period pieces (PAN AM, PLAYBOY CLUB)...witches (SECRET CIRCLE)...ghosts (A GIFTED MAN)...soaps (GCB, REVENGE)...adventure hours (THE RIVER)...musicals (SMASH)...thrillers (RINGER)...oh my!



Trend #4: Wait 'til Midseason!

- Typically, networks put their best shows on the fall schedule, and they order weaker projects for midseason, strictly as “backups.” This allows them to “go out with their big guns,” and sell upfront time based on their strongest shows.
- However, there are perceptions that good shows get lost in the shuffle when so much launches in the fall, and some recent midseason shows (BODY OF PROOF, THE VOICE, HAPPY ENDINGS, HARRY’S LAW) have launched relatively well...in fact, ABC and NBC had more success at midseason than in the fall.
- As a result, ABC and NBC are holding back some of their biggest series (GCB and SCANDAL on ABC, THE VOICE, SMASH and THE FIRM on NBC) for midseason
- CBS and CW are still putting on their best shows in the fall, while Fox has always been more of a “year-round” network



Trend #5: Popping the Bubble

- Every year, each network has some shows that are “on the bubble”...neither big hits that are shoo-ins to return, nor clear losers that are destined to be cancelled
- Usually, maybe half of these shows are eventually picked up, depending on how the development slates shake out, and what the scheduling needs are
- However, this year, most networks were particularly ruthless about cancelling bubble shows. ABC: bye-bye, BROTHERS & SISTERS and V! CBS: bye-bye, MAD LOVE, S***, DEFENDERS and CRIMINAL MINDS spinoff! Fox: adios, CHICAGO CODE, LIE TO ME and HUMAN TARGET! (Plus originally BREAKING IN, until it was revived later in the summer.) Only NBC and CW held onto most of their bubble shows.
- This is a reflection of: (a) the strong pilot season, (b) networks willing to be a little more aggressive in an expanding market, and (c) networks willing to “cut their losses” unless there’s a back-end dividend (like on RULES OF ENGAGEMENT).



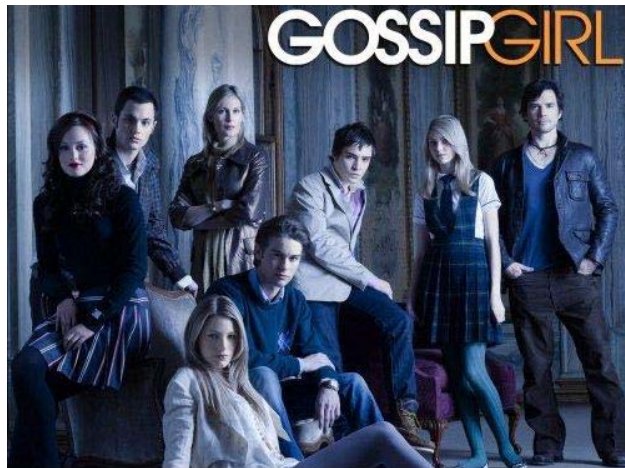
Trend #6: No Aggressive Scheduling Moves

- In past years, networks would frequently move their biggest shows to new nights/time periods to make a strategic “attack”; think FRASIER moving to Tuesday, CSI and SURVIVOR to Thursday, or GREY’S to Thursday.
- Lately, there have been fewer of these moves; the only notable one last year was CBS moving BIG BANG to Thu, which shocked the industry (and worked out okay).
- This year, no big, aggressive moves. A few shows were uprooted (like CSI moving to Wed, or GOOD WIFE moving to Sun), but these are more cases of downgrading an underperforming franchise rather than attacking with a show on the rise.
- Why? In the DVR era, a show’s actual time period matters less. There are fewer TP’s to move to, now that 10:00pm is hit hard by timeshifting; Mon-Thu are dominated by reality shows; Fri is little-watched; Sat is repeats; and Sun is football and cable. So if a show is working, it tends to stay put.



Trend #7: The Night of the Living Showrunner

- Along the lines of stable scheduling...more and more, networks are scheduling shows from the same creator/showrunner back-to-back
- Already, we had back-to-back Chuck Lorre comedies; NCIS programs; Shonda Rhimes medical dramas; Greg Daniels comedies; and Seth MacFarlane animation
- Next season, we'll have all of those plus back-to-back Josh Schwartz dramas (CW, Mon) and Kevin Williamson dramas (CW, Thu)
- Why? Better audience flow, and an ideal lead-in...if you're going to promote a new show as being "from the creator of...", why not air it after the original?



Now for a night-by-night Look at Fall 2011...



Monday

Mon	8:00pm	8:30pm	9:00pm	9:30pm	10:00pm	10:30pm
ABC	Dancing With the Stars				Castle	
CBS	HIMYM	2 Broke Girls	2.5 Men	Mike & Molly	Hawaii 5-0	
NBC	The Sing-Off				The Playboy Club	
Fox	Terra Nova		House			
CW	Gossip Girl		Hart of Dixie			

- ABC is “status quo” on a night that they usually win.
- CBS is adding a very promising new comedy with a strong creative pedigree; that plus Ashton on 2.5 MEN should bolster the night and keep them a solid #2.
- Fox is shifting a fading HOUSE to 9:00pm, and adding TERRA NOVA at 8:00pm, a big-budget, high-concept show with an impressive creative pedigree.
- NBC gives THE SING-OFF its first fall berth, and adds PLAYBOY CLUB at 10:00pm. These two very disparate shows might find an uphill battle on a competitive night.
- CW shifts GOSSIP GIRL to 8:00pm and adds Rachel Bilson medical procedural HART OF DIXIE at 9:00pm, giving them a “Josh Schwartz block” on Mondays.

Tuesday

Tue	8:00pm	8:30pm	9:00pm	9:30pm	10:00pm	10:30pm
ABC	Last Man...	Man Up	Dancing Results Show		Body of Proof	
CBS	NCIS		NCIS: LA		Unforgettable	
NBC	The Biggest Loser				Parenthood	
Fox	Glee		The New Girl	Raising Hope		
CW	90210		Ringer			

- CBS adds the very promising, high-concept UNFORGETTABLE in place of a softer, older-skewing GOOD WIFE, which should give it some growth on the night.
- ABC introduces a comedy block anchored by Tim Allen, but it might find tough sledding against NCIS (dominant among M25-54).
- Fox adds the much-buzzed-about THE NEW GIRL to its Tuesday comedy lineup, which should give it growth at 9:00pm, but GLEE might be fading at 8:00pm.
- NBC is “status quo,” potentially troublesome since BIGGEST LOSER is downtrending and losing Jillian Michaels, and PARENTHOOD has always been a very niche show.
- CW relocates 90210 and adds RINGER, a show developed for CBS, starring Sarah Michelle Gellar. Will the BUFFY fans return to see their queen bee on TV again?

Wednesday

Wed	8:00pm	8:30pm	9:00pm	9:30pm	10:00pm	10:30pm
ABC	The Middle	Suburgatory	Modern Family	Happy Endings	Revenge	
CBS	Survivor		Criminal Minds		CSI	
NBC	Up All Night	Free Agents	Harry's Law		Law & Order: SVU	
Fox	The X Factor			Teen Daughter		
CW	H8R		America's Next Top Model			

- ABC adds two new shows to its competitive Wednesday lineup, but both time periods have been tough, and HAPPY ENDINGS was a niche show this spring.
- NBC opens a new comedy block from 8:00-9:00pm; UP ALL NIGHT has a lot of buzz and some big stars, but it's tough launching a new comedy at 8:00pm, especially against such tough competition. Not much flow to HARRY'S LAW, either.
- CBS relocates CSI to the 10:00pm hour, which should give it some growth vs. DEFENDERS last fall, especially with new star Ted Danson.
- Fox opens THE X-FACTOR on this night, which could be as dominant as IDOL.
- CW moves a fading MODEL to 9:00pm, and adds the buzzy H8R at 8:00pm; however, it's up against two other big reality shows with some young appeal.

Thursday

Thu	8:00pm	8:30pm	9:00pm	9:30pm	10:00pm	10:30pm
ABC	Charlie's Angels		Grey's Anatomy		Private Practice	
CBS	Big Bang	Gentleman	Person of Interest		The Mentalist	
NBC	Community	Parks & Rec	The Office	Whitney	Prime Suspect	
Fox	The X Factor Results		Bones			
CW	Vampire Diaries		Secret Circle			

- ABC adds CHARLIE’S ANGELS at 8:00pm; it’s a known franchise, but will it draw viewers to a brutal time period, especially before two aging medical dramas?
- CBS adds GENTLEMAN at 8:30pm, and then its very promising PERSON OF INTEREST at 9:00pm; potential growth vs. CSI.
- NBC adds WHITNEY and PRIME SUSPECT, which have broader appeal than its typical Thu shows, but might not be the best “fit” with its single-cam comedies.
- On Fox, X-FACTOR could deliver at IDOL-like levels.
- CW’s SECRET CIRCLE is a perfect fit with VAMPIRE and creates a Kevin Williamson block.

Friday

Fri	8:00pm	8:30pm	9:00pm	9:30pm	10:00pm	10:30pm
ABC	Ex Makeover: Home Edition		Shark Tank		20/20	
CBS	A Gifted Man		CSI: NY		Blue Bloods	
NBC	Chuck		Grimm		Dateline NBC	
Fox	Kitchen Nightmares		Fringe			
CW	Nikita		Supernatural			

- ABC moves EMHE from Sun, which could give it some growth on Fri.
- CBS' A GIFTED MAN is 50/50 in the Fri 8:00pm hour; a really tough slot to launch a show, but "talking to ghosts and God" works for CBS in the hour.
- NBC moves CHUCK from Mon and introduces GRIMM; will enough genre viewers support these shows on low-HUT Friday night?
- Status quo for Fox on the night; they could win in A18-49.
- CW moves NIKITA to Fri night, which could perform similarly to SMALLVILLE.

Saturday

Sat	8:00pm	8:30pm	9:00pm	9:30pm	10:00pm	10:30pm
ABC	College Football					
CBS	Rules	Comedy Sat	Crimetime Saturday		48 Hours	
NBC	Repeats		Repeats		Repeats	
Fox	Cops	Cops 2	Repeats			

- CBS moves RULES to Sat, to get it to 100 episodes for syndication; ratings should be modest.
- Fox finally cancels AMERICA'S MOST WANTED after 20+ years, and will join the other networks in airing repeats on Saturday (other than a new COPS at 8:00pm).
- Otherwise, status quo!

Sunday

Sun	8:00pm	8:30pm	9:00pm	9:30pm	10:00pm	10:30pm
ABC	Once Upon a Time		Desperate Housewives		Pan Am	
CBS	Amazing Race		The Good Wife		CSI: Miami	
NBC	Football					
Fox	Simpsons	Allen Gregory	Family Guy	American Dad		

- ABC rebuilds a downtrending Sun night with high-concept dramas ONCE UPON A TIME and PAN AM; GCB waits in the wings if one or both don't work.
- CBS relocates GOOD WIFE to Sun at 9:00pm; its older skew should make it a better fit for Sun, and possibly take some W35-54 away from DH's final season.
- NBC and Fox are largely status quo on a night dominated by football and cable.

Some final thoughts/predictions...

- Fox should be dominant next season with X-FACTOR in the fall and a refreshed IDOL midseason, even if not all of their ambitious new dramas (TERRA NOVA, TOUCH, ALCATRAZ) do well.
- CBS should win again in total viewers, but its CSI franchise has only a season or two left, and SURVIVOR is weaker now, too. Can its new procedurals carry the torch?
- ABC might see some slight growth with its new dramas and Tim Allen, but it too has a number of aging hits to replace, led by DH and GREY'S.
- NBC will probably have another challenging fall. They're keeping their powder dry until midseason, and they're going to have to use the entire Comcast/NBCU platform and the Super Bowl franchise to promote the heck out of their most promising new shows (THE VOICE, SMASH and THE FIRM).
- CW will probably be "flat to up slightly" thanks to some solid new dramas and reality shows; still, this is something of a "holding pattern" year before greater changes under a new prexy looking to do more procedurals and comedies.

Thank You!

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Any Questions?