



New Series Performance and Prognosis

By Steve Sternberg

Everyone understandably focuses on new programming at the start of the season, but a network's returning series performance is actually more important to its success. There are a few basic reasons for this.

- There are simply more new series than returning series.
- When a returning show starts to decline it generally continues to erode. When a new show flops, it is often replaced by a program that does better.
- New series success does not necessarily lift a network's entire night as it once did.

While it's still way too early to know where things will pan out, **CBS** has certainly had the best start when it comes to its returning series. Several of the network's key programs have started out better than last season (**Criminal Minds**, **CSI: Miami**, **CSI: NY**, **NCIS**, **How I Met Your Mother**, **Two and a Half Men**, **48 Hours Mystery**), while some others are only down marginally (**Big Bang Theory**, **Survivor**). Whether this holds up remains to be seen, but CBS couldn't have asked for a much better start to the new season.

FOX has had a decent start to the season, as its returning Sunday animated comedies, **The Simpsons**, **Family Guy**, and **American Dad**, are outpacing last year, as is **Bones**.

ABC and **NBC** are not having the same success with returning series, as virtually all their non-football series are down from a year ago. Again, it's too early to say this will continue, but it's not a promising sign for either network.

ABC's biggest declines come from their second-season series, which were cut short by the writers' strike, and the network is sort of promoting as new (**Dirty Sexy Money**, **Private Practice**, **Pushing Daisies**). Of its more successful returning series, **Dancing With the Stars**, **Grey's Anatomy**, **Desperate Housewives**, and **Brothers & Sisters**, the declines are smaller (less than 10%). **Ugly Betty**, however, was down sharply in its premiere.

NBC's problems run just as deep, as **Heroes**, **Law & Order: SVU**, **E.R.**, and **My Name is Earl** were all down by more than 15 percent among adults 18-49. So far, only **The Office** and **Biggest Loser** are holding their own.

CW's **Gossip Girl** is up significantly over last year at this time, and **Supernatural** is up slightly. Its only other two returning series to debut at this writing, **America's Next Top Model** and **Smallville**, are down a bit.

New Series Performance

Although returning series performance might have a bigger impact on overall ratings, new series performance is still significant. It's important for a network to have a new success or two each year, to refresh it's lineup, and to help offset the inevitable audience erosion of returning series.

CBS's *The Mentalist* and **FOX's *Fringe***, are the two stand-out new shows so far this season. The CBS drama because it sustained its strong opening performance in its second episode. The FOX drama, not just because of its solid rating performance, but also because of its reduced commercial load.

MAGNA's research shows that the audience retention of ***Fringe***'s commercial pods have so far been significantly greater than the typical FOX drama (helped no doubt by the network announcing that "***Fringe*** will return in 60, 70, or 90 seconds" before each national commercial pod).

We looked at *Fringe* in relation to other FOX dramas the week of September 22nd. Here are some of our key findings:

- ***Fringe*** contained less than half the commercial load of the typical FOX drama.
- Even more significant, the average length of ***Fringe***'s national commercial pods was only 40% of the typical FOX drama. That's because when FOX airs local commercials, they are part of its normal commercial pods, but in ***Fringe***, the reduced pods are exclusively national, with a local pod broken out separately. So while the average commercial pod in other dramas was 3 minutes, 16 seconds, the average national commercial pod in ***Fringe*** was just 1 minute, 18 seconds.
- Looking at Live + Same Day ratings, the average adult 18-49 rating fall-off from the program segment to the commercial pod for the typical FOX drama was 15%. For ***Fringe*** it was just 7%. This is a major improvement in audience retention.

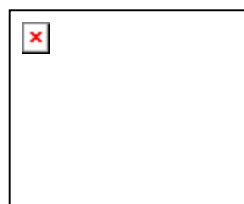
Fringe vs. Other FOX Dramas – Commercial Pod Dynamics (w/o 9/22)

Program	% Prog.	% Comm'l	Avg. Comm'l Pod Length	Commercial Pod Index	
				Household	A18-49
Terminator	69%	26%	3:09	87	85
Prison Break	71%	26%	3:08	87	85
House	69%	29%	3:30	89	86
Bones	70%	28%	3:18	88	85
Avg. FOX Drama	70%	27%	3:16	88	85
Fringe	84%	13%	1:18*	92	93

Source: MAGNA analysis of MAGNA and copyrighted Nielsen NPower data (Live + Same Day)

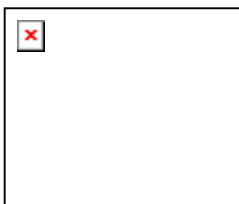
* National commercial pod average

Following is a look at new series performance to date for each broadcast network.



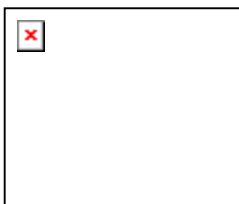
New (and kind of new) Series Performance and Prognosis

Program	Date	HH	P12-34	A18-49	A25-54	A50+
ABC						
Opportunity Knocks Tue 8-9 (premiere 9/23)	9/23 9/30	4.1/6 3.8/6	1.4/5 1.4/5	1.8/5 1.8/5	2.3/6 2.1/5	3.4/6 2.6/5
Does not perform as well as NBC's Biggest Loser , so it's probably a disappointment for ABC.						
Life on Mars Thu 10-11 (premiere 10/9)						
Pushing Daisies Wed 8-9 (return 10/1)	10/1	4.0/7	1.6/5	2.0/6	2.5/7	3.3/6
A relatively large fall-off from where it debuted last season, but about the same numbers it had toward the end of last 4 th Quarter. ABC was obviously hoping for better than a 4 th place finish among adults 18-49 for this critical darling. We don't see any reason to expect significant improvement.						
Private Practice Wed 9-10 (return 10/1)	10/1	5.5/8	2.7/8	3.3/8	3.6/8	3.6/7
As with its lead-in, audience levels were down from start of last season, but close to where they were at end of last 4 th Quarter. Unlike its lead-in, Private Practice was still the highest rated show of the night among women 18-34 and tied for the lead (with CSI: NY) among women 18-49. ABC should be satisfied if not happy.						
Dirty Sexy Money Wed 10-11 (return 10/1)	10/1	4.7/8	1.6/5	2.4/7	3.0/7	3.8/8
Premiere was a distant second to CBS's CSI: NY , and just ahead of NBC's Lipstick Jungle . ABC should be able to do better here.						



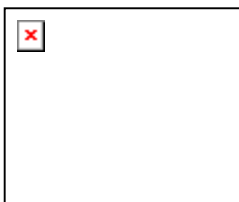
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Program	Date	HH	P12-34	A18-49	A25-54	A50+
CBS						
Worst Week Mon 9:30-10 (premiere 9/22)	9/22 9/29	6.7/10 5.6/8	2.0/5 1.5/4	3.8/8 2.9/7	4.8/10 3.9/8	5.7/10 5.0/9
Premiere lost 3-4share points from its Two and a Half Men lead-in. Not bad opposite such tough competition (Dancing With the Stars, Heroes). Second episode declined further – not a promising sign.						
The Mentalist Tue 9-10 (premiere 9/23)	9/23 9/30	9.9/15 9.8/15	1.7/5 1.9/6	3.5/9 3.6/9	5.0/11 5.1/12	11.2/20 11.0/19
Very strong debut, particularly among CBS's core 35+ audience.. New CBS dramas often get good initial viewer sampling. Second episode held up, and its adult 25-54 audience did not decline from its NCIS lead-in. Could be the first bona fide new hit of the season.						
Gary Unmarried Wed 8:30-9 (premiere 9/24)	9/24	4.5/7	1.2/4	2.4/7	3.1/8	3.6/7
Premiere built slightly on its Old Christine lead-in. It was competitive in a relatively weak time period. Its fate will likely rest on that of its lead-in.						
Eleventh Hour Thu 10-11 (premiere 10/9)						
The Ex-List Fri 9-10 (premiere 10/3)						
NBC						
My Own Worst Enemy Mon 10-11 (premiere 10/13)						
Knight Rider Wed 8-9 (premiere 9/24)	9/24 10/1	4.5/7 4.7/8	1.9/7 1.9/7	2.5/7 2.4/7	2.9/8 3.0/8	3.4/7 3.9/8
About what we expected, but must be a disappointment for NBC, which was hoping for more the third place among adults 18-49 and fourth place among adults 25-54. It was the highest rated show of the night among men 18-34, but it remains to be seen whether that is enough to satisfy the network. Second episode gained among older viewers – not the folks NBC is going for here.						



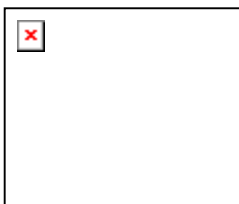
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Program	Date	HH	P12-34	A18-49	A25-54	A50+
NBC						
Kath & Kim Thu 8:30-9 (premiere 10/9)						
Crusoe Fri 8-9 (premiere 10/17)						
Lipstick Jungle Wed 10-11 (return 9/24)	9/24 10/1	4.4/7 3.9/7	1.5/5 1.3/4	2.4/6 2.0/5	2.8/7 2.2/6	3.1/7 2.6/6
Debut finished way behind CBS's CSI: NY (even among its strength – women 25-54). Barely beat out the second half of the David Blaine special on ABC (not a promising sign). As we expected, slipped a bit when ABC's Dirty Sexy Money returned to this hour on October 1 st . No reason to expect any improvement here.						
Life Fri 10-11 (return 10/3)						
FOX						
Terminator: S. Connor Tue 9-10 (return 9/8)	9/8 9/15 9/22 9/29	4.0/6 3.6/6 3.8/6 3.4/5	2.0/6 1.7/5 1.9/6 1.5/5	2.4/7 2.1/6 2.3/6 2.0/5	2.8/7 2.3/6 2.5/6 2.4/6	2.7/5 2.5/5 2.5/4 2.2/4
Returned against weaker than normal competition, and still declined 20% from last season. FOX was hoping for more in its second season.						
Fringe Tue 9-10 (premiere 9/9 at 8pm)	9/9 9/16 9/23 9/30	5.9/9 8.1/13 5.8/9 6.1/9	2.3/7 3.8/11 3.3/10 3.2/10	3.2/9 5.1/13 4.1/10 4.2/11	3.9/10 6.0/14 4.4/10 4.7/11	4.7/9 6.1/11 3.6/6 3.9/7
Received a boost in its second episode, following House 's debut, and not being up against regular programming. Fell back to Earth in episode 3, but still won its hour among viewers under 35 (and was a close second to ABC's Dancing With the Stars among adults 18-49). Episode 4 won the hour among adults 18-34 and 18-49. Seems to have found its audience. FOX should be pleased.						



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FOX						
Do Not Disturb Wed 9:30-10 (premiere 9/10)	9/10	3.1/5	1.2/4	1.9/5	2.2/5	1.9/4
	9/17	2.5/4	1.0/3	1.5/4	1.8/4	1.7/3
	9/24	2.4/4	1.0/3	1.3/3	1.7/4	1.6/3
CANCELED						
Hole in the Wall Thu 8-8:30 (premiere 9/11)	9/11	2.7/5	1.8/7	2.0/7	2.1/6	1.2/2
	9/18	2.6/5	1.5/6	1.8/6	1.9/6	1.1/2
	10/2	2.2/4	1.3/4	1.5/4	1.5/4	1.0/2
Hole in the Wall Thu 8:30-9 (premiere 9/11)	9/11	3.5/6	2.3/8	2.6/8	2.7/7	1.7/3
	9/18	3.2/5	2.0/7	2.2/7	2.4/6	1.4/3
	10/2	2.3/4	1.5/5	1.6/4	1.7/4	1.0/2
CW						
90210 Tue 8-9 (premiere 9/2)	9/2	3.2/5	2.7/8	2.6/7	2.4/6	0.6/1
	9/9	2.2/4	1.9/6	1.7/5	1.6/4	0.5/1
	9/16	2.3/4	2.0/7	1.7/5	1.5/4	0.6/1
	9/23	2.1/3	1.7/6	1.5/4	1.4/4	0.5/1
	9/30	2.2/4	2.0/7	1.7/5	1.5/4	0.4/1
<p>Two-hour debut was against scripted repeats, but it did face originals of Big Brother, and America's Got Talent. 90210 was highest rated show of the night among teens and women 18-34, and tied America's Got Talent and a repeat of House among women 18-49.</p> <p>Second episode had tougher competition, with FOX's Fringe premiere. CBS also moved Big Brother back an hour to 8pm—its young appeal could have hurt 90210. Seems to have settled in to its audience level.</p>						
Privileged Tue 9-10 (premiere 9/9)	9/9	1.9/3	1.4/4	1.2/3	1.1/3	0.6/1
	9/16	1.7/3	1.3/4	1.1/3	1.0/2	0.7/1
	9/23	1.2/2	1.1/3	0.8/2	0.7/2	0.4/1
	9/30	1.3/2	1.2/4	0.9/2	0.7/2	0.3/1
<p>As expected, loses a share point or two from its 90210 lead-in. No reason to expect that to change, and no reason to expect the show to last much longer.</p>						



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Program	Date	HH	P12-34	A18-49	A25-54	A50+
CW						
Stylista Wed 9-10 (premiere 10/22)						
In Harm's Way Sun 7-7:30 (premiere 10/5)						
Surviving Suburbia Sun 7:30-8 (premiere 11/2)						
Valentine, Inc. Sun 8-9 (premiere 10/5)						
Easy Money Sun 9-10 (premiere 10/5)						

