



# Media Insights

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## New and Returning Series Performance

By Steve Sternberg

Barely two months into the new season, Election night is over and the November Sweeps are underway. We now have a clear picture of which new shows are working and which ones are not. In a better economy, we suspect we would have seen many more cancellations at this point in the season.

Much talk still centers on how the networks' new series are performing, but we feel compelled to again point out that network's returning series have a much greater impact on its position in the marketplace. There are two basic reasons for this:

- There are simply far more returning shows on each network's schedule than new shows.
- When a new show flops, it is usually replaced by a show that does better. When a returning show starts to decline, it often continues to slide and is then more often than not replaced by a show that does just as poorly or worse.

**CBS** has declined the least among the broadcast networks. Among adults 18-49 it's down 6% (just two-tenths of a rating point) from a year ago, and is now tied with ABC for the lead. It is alone in first place among adults 25-54 (down 7% from a year ago).

CBS has so far had the most success with new series. **The Mentalist** is a bona-fide hit, and the only show that has been able to hold onto most of its **NCIS** lead-in audience. The Thursday drama, **Eleventh Hour** has alternated with **E.R.** for the time period lead.

The new Monday comedy, **Worst Week**, has been competitive in a relatively weak time slot, while the new Wednesday comedy, **Gary Unmarried**, has held onto its **Old Christine** lead-in audience, and is ahead of ABC and NBC. Both must be considered modest time-period successes (although either can probably be replaced without losing any viewers). The new Friday drama, **The Ex-List**, may be in trouble—it has been pre-empted the past few weeks for **NCIS** repeats (which have performed better).

But CBS does not have enough new series success to have a major impact on its average ratings for the week. The performance of many CBS returning shows contribute more to the network's overall performance. **The Big Bang Theory**, **How I Met Your Mother**, **Two and a Half Men**, **NCIS**, **Criminal Minds**, **CSI: NY**, and **Ghost Whisperer** are all doing better than last season.

**FOX** only had a few new shows, and **Fringe** is its lone new success. The network's typical pre-**American Idol** 4<sup>th</sup> Quarter decline continues, but has been less severe partly because of the success of its Sunday lineup—**American Dad**, **Family Guy**, **King of the Hill**, and **The Simpsons** are all up from a year ago. **Bones** is also up a bit from last season. FOX's more competitive standing in the 4<sup>th</sup> Quarter, bodes well for its full-season performance (as long as **Idol** holds up).

**NBC** has had no success with its new series (which may be an indication that the pilot process, while expensive, is nonetheless important—FOX and CBS, with the most successful new shows, did produce pilots). NBC's new comedy, **Kath & Kim**, and its new dramas, **Knight Rider**, and **Crusoe**, have all been big disappointments for the network. And its most heavily promoted new show, **My Own Worst Enemy**, was just canceled.

NBC has had trouble developing new shows for a few years now. The network's 13% decline among adults 18-49 is more a result of its poor returning series performance. Only **30 Rock** and **Biggest Loser** are currently ahead of last year's pace. **Heroes**, as well as second season shows, **Chuck**, **Life**, and **Lipstick Jungle** (just canceled), are down 20% or more from a year ago. All other returning series on NBC are down by varying degrees among viewers under 50.

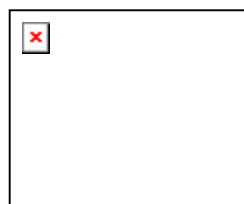
**NFL Sunday Night Football** has helped keep NBC afloat. But without some new successes materializing, NBC could have big problems come January.

**ABC** only had one new scripted series, **Life on Mars**, which will be given another chance—moving to Wednesday following **Lost** in the 1<sup>st</sup> Quarter. ABC has declined the most from a year ago, primarily because its strongest series, **Grey's Anatomy**, **Deperate Housewives**, **Dancing With the Stars**, **Brothers and Sisters**, and **Ugly Betty**, are all down 15-20% among adults 18-49 from last season. Second-season shows, **Pushing Daisies**, **Dirty Sexy Money**, and **Private Practice** are down even more.

ABC needs **Lost** to perform well when it returns, and needs a new series success or two in mid-season, if it is to stem a more significant decline in the second half of the season.

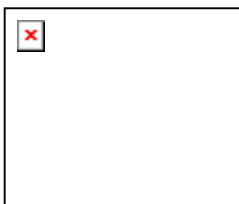
**CW** continues to have trouble developing new series. **90210** is doing OK, but **Privileged** and **Stylista** are weak. On the returning series front, **Gossip Girl** and **Supernatural** are up from a year ago. The network's other returning shows are down.

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



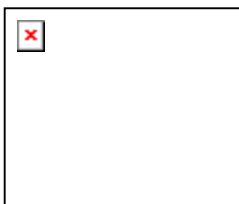
## New (and kind of new) Series Performance and Prognosis

Program	Date	HH	P12-34	A18-49	A25-54	A50+
<b>ABC</b>						
<b>Opportunity Knocks</b> Tue 8-9 (premiere 9/23)	9/23 9/30 10/14	4.1/6 3.8/6 3.3/5	1.4/5 1.4/5 1.2/4	1.8/5 1.8/5 1.3/4	2.3/6 2.1/5 1.5/4	3.4/6 2.6/5 2.9/5
Disappointing performance for ABC. Should be officially gone soon.						
<b>Life on Mars</b> Thu 10-11 (premiere 10/9)	10/9 10/16 10/23 10/30 11/6	7.5/13 5.4/9 5.3/9 5.5/9 5.8/10	2.2/7 1.6/5 1.6/5 1.6/5 1.8/6	3.7/10 2.5/7 2.4/6 2.6/7 2.9/8	4.7/12 3.4/8 3.1/8 3.3/8 3.5/9	6.5/13 4.8/10 4.6/9 4.7/10 4.8/10
Solid debut. But lost a lot of ground in its second episode, losing half its <b>Grey's Anatomy</b> adult 18-49 lead-in audience, and slipping to third in its hour behind CBS's new drama, <b>Eleventh Hour</b> . It has stabilized, and is competitive with CBS (and behind NBC) among adults 18-49 and 25-54. ABC will shift the show to Wednesday at 10pm ( following <b>Lost</b> ), in the 1 <sup>st</sup> Quarter.						
<b>Pushing Daisies</b> Wed 8-9 (return 10/1)	10/1 10/8 10/15 10/22 10/29	4.0/7 3.6/6 4.1/7 3.7/6 4.1/6	1.6/5 1.6/5 1.5/5 1.6/5 2.0/6	2.0/6 2.0/6 1.9/5 1.9/5 2.3/6	2.5/7 2.2/6 2.3/6 2.3/6 2.6/6	3.3/6 2.6/5 3.3/6 2.7/5 3.2/6
ABC was obviously hoping for better than a 4 <sup>th</sup> place finish among adults 18-49 for this critical darling. We don't see any reason to expect improvement at this point.						
<b>Private Practice</b> Wed 9-10 (return 10/1)	10/1 10/8 10/22 10/29 11/5	5.5/8 5.1/8 5.5/8 5.3/8 6.2/9	2.7/8 2.0/6 2.2/6 2.1/6 2.4/7	3.3/8 2.6/7 3.0/8 2.9/7 3.1/8	3.6/8 3.1/7 3.5/8 3.4/8 3.5/8	3.6/7 3.9/7 3.8/7 3.9/7 4.9/9
Unlike its lead-in, <b>Private Practice</b> this is the highest rated show of the night among women 18-34 and virtually tied for the lead (with <b>CSI: NY</b> ) among women 18-49. Moves to Thursday at 10pm, following <b>Grey's Anatomy</b> , in the 1 <sup>st</sup> Quarter.						
<b>Dirty Sexy Money</b> Wed 10-11 (return 10/1)	10/1 10/8 10/22 10/29 11/5	4.7/8 4.0/7 3.9/6 4.1/7 4.2/7	1.6/5 1.4/5 1.2/4 1.3/4 1.4/4	2.4/7 2.0/5 1.9/5 2.0/5 2.0/5	3.0/7 2.4/6 2.4/6 2.5/6 2.4/6	3.8/8 3.3/7 3.2/7 3.4/7 3.5/7
It's a distant second to CBS's <b>CSI: NY</b> , and just ahead of NBC's <b>Lipstick Jungle</b> . It loses a big chunk of its lead-in's female audience. ABC should be able to do better here.						



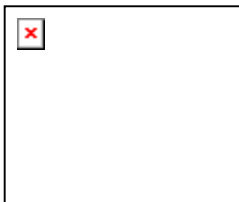
## New (and kind of new) Series Performance and Prognosis

Program	Date	HH	P12-34	A18-49	A25-54	A50+
<b>CBS</b>						
<b>Worst Week</b> Mon 9:30-10 (premiere 9/22)	9/22 9/29 10/5 10/13 10/20 11/3 11/10	6.7/10 5.6/8 5.7/8 6.3/9 6.3/9 5.4/8 5.9/9	2.0/5 1.5/4 1.7/4 1.7/5 1.7/5 1.5/4 1.5/4	3.8/8 2.9/7 3.0/7 3.2/7 3.2/7 2.6/6 2.8/7	4.8/10 3.9/8 3.7/8 4.1/9 3.9/8 3.3/7 3.6/8	5.7/10 5.0/9 4.7/8 5.0/10 5.5/10 4.8/8 5.6/10
Loses 4-5 share points from its <b>Two and a Half Men</b> lead-in. Got a small boost in week 4 as ABC's comedy, <b>Samantha Who?</b> , debuted against it. CBS alternates with the ABC sitcom among adults 25-54 (and is a close second to NBC's <b>Heroes</b> ). Once <b>Dancing With the Stars</b> is over, and <b>Samantha</b> doesn't have as strong a lead-in, CBS should be stronger here. CBS may decide, however, that it can do better in this half-hour. 11/3 episode was hurt by an <b>SNL Election</b> special on NBC.						
<b>The Mentalist</b> Tue 9-10 (premiere 9/23)	9/23 9/30 10/14 10/21 10/28 11/11	9.9/15 9.8/15 9.4/14 9.6/14 10.1/15 10.1/15	1.7/5 1.9/6 1.7/5 1.7/5 2.1/6 2.2/6	3.5/9 3.6/9 3.4/8 3.4/9 3.9/9 4.0/10	5.0/11 5.1/12 4.7/11 4.8/11 5.4/12 5.5/12	11.2/20 11.0/19 10.6/19 11.1/19 11.2/19 11.5/20
Very solid performance, particularly among CBS's core 35+ audience.. Retains most of its <b>NCIS</b> lead-in audience among adults 18-49 and 25-54. Edging out ABC's <b>Dancing With the Stars</b> among adults 18-49 and 25-54 is significant. CBS has given the show a full-season order.						
<b>Gary Unmarried</b> Wed 8:30-9 (premiere 9/24)	9/24 10/1 10/8 10/15 10/22 11/5	4.5/7 4.6/7 4.9/8 5.0/8 5.0/8 4.3/6	1.2/4 1.1/3 1.1/4 1.4/4 1.3/4 1.2/4	2.4/7 2.2/6 2.4/6 2.3/6 2.5/7 2.1/6	3.1/8 2.9/7 3.0/7 3.0/7 3.2/8 2.9/7	3.6/7 4.0/7 4.2/8 4.2/8 4.2/8 3.4/6
Holds onto its <b>Old Christine</b> lead-in audience. It is competitive in a relatively weak time period. It has beaten ABC and NBC among adults 18-49 and 25-54. Its fate will likely rest on that of its lead-in, but CBS couldn't expect much more here.						
<b>Eleventh Hour</b> Thu 10-11 (premiere 10/9)	10/9 10/16 10/23 10/30 11/6	7.2/12 7.8/13 7.8/13 7.5/13 7.0/12	1.9/6 1.7/6 1.6/5 1.4/5 1.6/5	3.2/9 3.2/9 3.1/8 2.8/8 3.1/8	4.1/10 4.2/11 4.1/10 3.7/9 4.0/10	7.1/14 7.7/16 7.9/16 6.2/14 7.1/15
Premiere was a close third in a competitive hour. But second episode gained some viewers and edged out NBC's <b>E.R.</b> among adults 25-54 (it has since slipped to a close second). It does lose nearly 40% of its <b>CSI</b> lead-in audience, but if it continues to alternate with <b>E.R.</b> for the lead, CBS should be pleased.						
<b>The Ex-List</b> Fri 9-10 (premiere 10/3)	10/3 10/10 10/17 10/24	4.6/8 3.9/7 4.2/7 3.5/6	1.1/4 1.0/4 1.2/4 0.9/3	2.0/6 1.9/6 2.0/6 1.5/5	2.6/7 2.4/7 2.5/7 2.1/6	4.2/8 3.2/6 3.6/7 3.2/6
First few telecasts lost 3-4 share points from its <b>Ghost Whisperer</b> lead-in, but still managed to win this weak network hour among adults 18-49 and 25-54. Being the only scripted network series in the time period helped. When NBC's <b>Crusoe</b> moved here in against episode 4, it declined sharply (although still managed to eke out a win among adults 25-54). CBS may decide it can better take advantage of its strong lead-in. Recent repeats of <b>NCIS</b> did better here.						



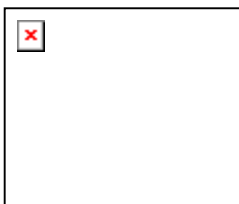
## New (and kind of new) Series Performance and Prognosis

Program	Date	HH	P12-34	A18-49	A25-54	A50+
<b>NBC</b>						
<b>My Own Worst Enemy</b> Mon 10-11 (premiere 10/13)	10/13 10/20 10/27 11/10	4.7/8 3.6/6 3.4/5 2.7/4	1.9/6 1.9/6 1.6/4 1.2/4	3.0/8 2.5/6 2.3/6 1.8/5	3.3/8 2.6/6 2.6/6 2.0/5	3.2/6 2.2/5 2.0/4 1.8/4
A big disappointment for NBC. As we expected, it has just been <b> canceled </b> .						
<b>Knight Rider</b> Wed 8-9 (premiere 9/24)	9/24 10/1 10/8 10/15 10/22 11/5	4.5/7 4.7/8 4.2/7 4.7/8 4.4/7 3.2/5	1.9/7 1.9/7 1.6/6 1.6/5 1.6/5 1.3/4	2.5/7 2.4/7 2.3/7 2.3/6 2.2/6 1.6/4	2.9/8 3.0/8 2.7/7 2.8/7 2.6/7 1.9/5	3.4/7 3.9/8 3.3/6 4.2/8 3.9/7 2.6/5
NBC was hoping for more the third place among adults 18-49 and fourth place among adults 25-54. It is generally 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. But NBC is considering factors beyond just ratings, such as product integration deals, which should keep <b> Knight Rider </b> on for a while.						
<b>Kath &amp; Kim</b> Thu 8:30-9 (premiere 10/9)	10/9 10/16 10/23 10/30 11/6	4.7/7 3.9/6 3.1/5 3.4/5 3.4/5	2.8/9 1.9/6 1.5/4 1.8/6 1.9/6	3.2/9 2.5/7 2.2/6 2.4/6 2.4/6	3.5/9 2.8/7 2.4/6 2.5/6 2.6/6	2.7/5 2.4/5 1.8/3 2.1/4 2.2/4
Debut episode built slightly on its <b> My Name is Earl </b> lead-in, and did beat the other broadcast networks among viewers under 35. Second episode declined, and finished third (behind <b> Ugly Betty </b> and <b> Survivor </b> ) among the under-35 set. Other NBC Thursday comedies have strong dual (male/female) audiences. <b> Kath &amp; Kim </b> is much stronger among women than men, which may hurt its chances of building an audience here.						
<b>Crusoe</b> Fri 9-10 (premiere 10/17) (2-hour premiere)	10/17 10/24 10/31 11/7	4.6/8 3.7/6 2.5/5 2.5/4	0.8/3 0.8/3 0.4/2 0.5/2	1.6/5 1.3/4 0.8/3 1.0/3	2.2/7 1.8/5 1.2/3 1.3/4	5.1/11 4.4/9 3.0/6 2.8/6
Declined following weak debut. Was hurt last two weeks with CBS airing <b> NCIS </b> repeats. Shouldn't last much longer.						
<b>Lipstick Jungle</b> Wed 10-11 (return 9/24)  Moved to Friday 10-11pm	9/24 10/1 10/8 10/22 10/29 10/31 11/7	4.4/7 3.9/7 3.4/6 3.2/5 3.5/6 2.3/4 2.3/4	1.5/5 1.3/4 1.2/4 1.1/3 1.4/4 0.5/2 0.8/3	2.4/6 2.0/5 1.9/5 1.7/4 1.9/5 1.0/3 1.2/4	2.8/7 2.2/6 2.1/5 1.9/5 2.1/5 1.2/3 1.5/4	3.1/7 2.6/6 2.2/5 2.0/4 2.3/5 1.9/4 1.7/4
NBC has just announced this disappointing show has been <b> canceled </b> .						
<b>Life</b> Fri 10-11 (return 10/3)  Moved to Wed 9-10	10/3 10/10 10/17 10/24 11/5	3.7/7 3.2/6 3.9/7 3.6/6 3.8/6	0.9/3 0.9/4 0.8/3 0.9/3 1.2/4	1.7/5 1.4/4 1.5/5 1.6/5 2.0/5	2.2/6 1.7/5 2.0/6 2.0/6 2.5/6	3.4/7 3.0/7 3.9/9 2.9/7 3.2/6
Finishing third, behind <b> 20/20 </b> , among adults 18-49, is not what NBC was thinking. Scheduling it here to begin with was not a sign of confidence in the show. Moving it to Wednesday at 9pm, following the incompatible <b> Knight Rider </b> , did little to improve its performance.						



## New (and kind of new) Series Performance and Prognosis

Program	Date	HH	P12-34	A18-49	A25-54	A50+
<b>FOX</b>						
<b>Terminator: S. Connor</b> Tue 9-10 (return 9/8)	9/8 9/15 9/22 9/29 10/6 10/20 11/3 11/10	4.0/6 3.6/6 3.8/6 3.4/5 3.6/5 3.0/5 3.2/5 3.1/5	2.0/6 1.7/5 1.9/6 1.5/5 1.9/6 1.4/4 1.6/4 1.4/4	2.4/7 2.1/6 2.3/6 2.0/5 2.3/6 2.0/5 2.0/5 2.0/5	2.8/7 2.3/6 2.5/6 2.4/6 2.5/6 2.3/5 2.3/5 2.4/5	2.7/5 2.5/5 2.5/4 2.2/4 2.4/5 1.9/3 2.2/4 2.0/3
FOX was hoping for more in its second season. Audience has stabilized, meaning this is about where it should remain. The network has given it a full-season order. It will move to Friday in the 1 <sup>st</sup> Quarter (often the last chance for a show to find an audience).						
<b>Fringe</b> Tue 9-10 (premiere 9/9 at 8pm)	9/9 9/16 9/23 9/30 10/14 10/21 10/28 (R) 11/11	5.9/9 8.1/13 5.8/9 6.1/9 5.7/9 5.5/8 3.7/6 5.2/8	2.3/7 3.8/11 3.3/10 3.2/10 3.2/9 2.9/9 1.9/5 3.0/8	3.2/9 5.1/13 4.1/10 4.2/11 4.0/10 3.9/10 2.3/6 3.8/9	3.9/10 6.0/14 4.4/10 4.7/11 4.4/10 4.4/10 2.6/6 4.3/9	4.7/9 6.1/11 3.6/6 3.9/7 3.3/6 3.3/6 2.2/4 3.1/5
Received a boost in its second episode, following <b>House</b> '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 <b>Dancing With the Stars</b> among adults 18-49). Last few episodes dominated among viewers under 35, and won second to CBS's <b>The Mentalist</b> among adults 18-49. Seems to have found its audience. FOX should be happy with its performance. It will follow <b>American Idol</b> in January, which should give it a boost.						
<b>Do Not Disturb</b> Wed 9:30-10 (premiere 9/10)	9/10 9/17 9/24	3.1/5 2.5/4 2.4/4	1.2/4 1.0/3 1.0/3	1.9/5 1.5/4 1.3/3	2.2/5 1.8/4 1.7/4	1.9/4 1.7/3 1.6/3
<b>CANCELED</b>						
<b>Hole in the Wall</b> Thu 8-8:30 (premiere 9/11)	9/11 9/18 10/2 10/16	2.7/5 2.6/5 2.2/4 2.3/4	1.8/7 1.5/6 1.3/4 1.5/5	2.0/7 1.8/6 1.5/4 1.4/4	2.1/6 1.9/6 1.5/4 1.4/4	1.2/2 1.1/2 1.0/2 1.1/2
Not much to say. Can be easily replaced at any time.						
<b>Hole in the Wall</b> Thu 8:30-9 (premiere 9/11)	9/11 9/18 10/2 10/16	3.5/6 3.2/5 2.3/4 2.3/4	2.3/8 2.0/7 1.5/5 1.6/5	2.6/8 2.2/7 1.6/4 1.5/4	2.7/7 2.4/6 1.7/4 1.5/4	1.7/3 1.4/3 1.0/2 1.0/2
Not much to say. Can be easily replaced at any time.						



## New (and kind of new) Series Performance and Prognosis

Program	Date	HH	P12-34	A18-49	A25-54	A50+
<b>CW</b>						
<b>90210</b> Tue 8-9 (premiere 9/2)	9/2 9/9 9/16 9/23 9/30 10/7 10/14 (R) 10/28 11/4	3.2/5 2.2/4 2.3/4 2.1/3 2.2/4 2.2/3 1.3/2 2.1/3 1.9/3	2.7/8 1.9/6 2.0/7 1.7/6 2.0/7 1.9/6 0.9/3 2.0/6 1.8/4	2.6/7 1.7/5 1.7/5 1.5/4 1.7/5 1.7/5 0.8/2 1.6/4 1.4/3	2.4/6 1.6/4 1.5/4 1.4/4 1.5/4 1.5/4 0.7/2 1.3/3 1.2/2	0.6/1 0.5/1 0.6/1 0.5/1 0.4/1 0.4/1 0.4/1 0.5/1 0.6/1
Has declined from its heavily hyped premiere episode. Fits in with CW's branding, so probably will last a while. 11/4 episode was on Election Night.						
<b>Privileged</b> Tue 9-10 (premiere 9/9)	9/9 9/16 9/23 9/30 10/7 10/14 (R) 10/21 10/28 11/4 11/11	1.9/3 1.7/3 1.2/2 1.3/2 1.6/2 0.9/1 1.1/2 1.4/2 1.2/2 1.4/2	1.4/4 1.3/4 1.1/3 1.2/4 1.3/3 0.7/2 0.8/3 1.1/3 1.2/3 1.3/4	1.2/3 1.1/3 0.8/2 0.9/2 1.1/2 0.6/1 0.7/2 0.9/2 0.9/2 0.9/2	1.1/3 1.0/2 0.7/2 0.7/2 1.0/2 0.4/1 0.6/1 0.8/2 0.7/1 0.7/1	0.6/1 0.7/1 0.4/1 0.3/1 0.5/1 0.3/0 0.3/1 0.3/0 0.3/1 0.3/0
As expected, loses a share point or two from its <b>90210</b> lead-in. For some reason, CW has ordered additional episodes. The network will air it following <b>Gossip Girls</b> a couple of times in the beginning of December, in an effort to get more viewers.						
<b>Stylista</b> Wed 9-10 (premiere 10/22)	10/22 11/5	1.3/4 1.2/2	1.3/4 0.9/3	1.1/3 0.9/2	0.9/2 0.8/2	0.5/1 0.4/1
Debut lost 3 share points from its <b>America's Next Top Model</b> lead-in. If it didn't decline, CW might have been satisfied with that. But it did decline.						
<b>In Harm's Way</b> Sun 7-7:30 (premiere 10/5)	10/5 10/12 10/19 10/26	0.4/1 0.5/1 0.4/1 0.5/1	0.3/1 0.2/1 0.2/1 0.2/1	0.3/1 0.3/1 0.2/1 0.3/1	0.3/1 0.3/1 0.3/1 0.3/1	0.2/0 0.3/1 0.2/0 0.2/0
Barely on the radar. Did even worse than when CW was programming the night itself. Can't imagine this remaining on for long. Production has "temporarily" been stopped.						
<b>Valentine, Inc.</b> Sun 8-9 (premiere 10/5)	10/5 10/12 10/19 10/26	0.8/1 0.7/1 0.5/1 0.6/1	0.4/1 0.4/1 0.2/1 0.3/1	0.4/1 0.4/1 0.2/1 0.3/1	0.4/1 0.4/1 0.3/1 0.3/1	0.5/1 0.4/1 0.3/1 0.4/1
See <b>In Harm's Way</b> .						
<b>Easy Money</b> Sun 9-10 (premiere 10/5)	10/5 10/12 10/19 10/26	0.7/1 0.5/1 0.5/1 0.4/1	0.3/1 0.2/1 0.2/0 0.3/1	0.4/1 0.3/1 0.2/0 0.3/1	0.4/1 0.3/1 0.2/0 0.2/0	0.5/1 0.3/1 0.4/1 0.3/1
See <b>Valentine Inc.</b>						

