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# MEDIA

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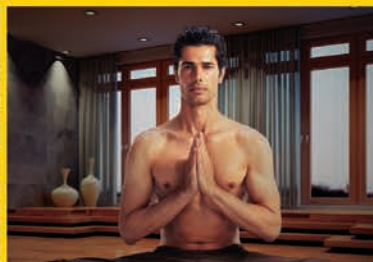
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**On the cover,** top row: ABC; ABC; Mark Youngblood/TLC. Second row: CBS; ABC; Mitchell Haaseth/ABC; Joseph Cultice/NBC. Third row: CBS; Elizabeth Morris/NBC; Adam Taylor/NBC. Fourth row: CBS; CBS; TLC; Timothy White/EI Bottom row: NBC; CBS; Adam Rose/Fox; David Moir/Bravo



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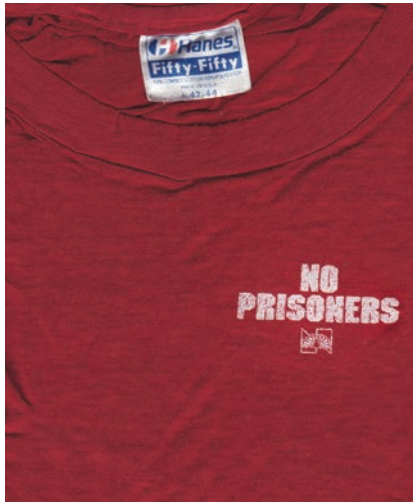
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## Betting Big on TV

Like Las Vegas and Hollywood, the upfronts combine glitzy showmanship with the thrill of the gamble

I collect T-shirts the way other people collect art or wine, but unlike them, I don't preserve them for the future. I live in them to remember an important experience they are associated with. I wear them until they are worn out and all that's left is the memory of what they represented. So it tickles me when I see my 17-year-old daughter sporting my 30-plus-year-old "No Nukes" T-shirt, or when I saw my son wearing the threadbare one shown in the image above.

That shirt is special to me for many reasons, but most importantly, because it was handed to me personally by late NBC programming chief Brandon Tartikoff in the spring of 1984, just after he briefed the affiliated station troops on the peacock network's new prime-time schedule. The shirt has an NBC logo with the words "No Prisoners" on top of it, and it conveyed the spirit Tartikoff had when I interviewed him on his plans to turn the network around after another devastating prime-time season — and one in which some pundits had written NBC, and Tartikoff, off altogether.

Maybe it was just showmanship, or salesmanship, but I believed Tartikoff believed what he was saying to me when he outlined how the new schedule, with rookie series *The Cosby Show* as its centerpiece, would put NBC back on top. History proved him right, and the experience, more than any other, defined for me what the upfront is really about: making bets. Big bets, but calculated bets. And all the things I've been highly critical of over the years — the upfront's smoke-and-mirrors spectacle, its antiquated market inefficiency, and especially the media spin surrounding it — are the things I love about it. It's all about the show, and if you pick the right ones, you're back on top.

We've dedicated this issue of *MEDIA* to examining the upfront — both the economics of its market structure, as well as the unique role it plays in the culture of our industry, and our society at large. It's the closest thing Madison Avenue and Broadcast Row have to Hollywood's dream factory, where the spin and sizzle are as much a part of the product as the product itself. But as the old Madison Avenue adage goes, nothing can kill a bad product faster than good advertising, so goes the prime-time upfront. But for every *Manimal* or *Super Train* there is also a *Cosby*.

You just never know until the viewers actually weigh in.

The part I like the least about the upfront, is the clubby, incestuous nature of how business gets done. And if you wonder why I'm so cynical about it, it is embodied by another adage I heard just after I started covering the upfront, and it's one that's still used today: "No buyer ever got fired for paying too much in the upfront, but some have lost their jobs for missing the upfront." The "missing" is a reference to the timing of the market, and the fact that buyers who don't move fast can get left holding the bag, missing out on commercial time in the best shows and/or paying too much for them. It's the kind of logic that is a nostalgic throwback to an old world of doing business in this age of programmatic buying and agency trading desks, but that kind of thinking is still pervasive among media buyers, and advertisers too.

I miss the days when a programmer like Tartikoff could make a few bets and transform a schedule, a network and prime-time television culture. I don't miss the old-school way agencies buy the upfront — because, like my faded T-shirt, it lingers on. **M**

**IT'S THE CLOSEST THING MADISON AVENUE AND BROADCAST ROW HAVE TO HOLLYWOOD'S DREAM FACTORY, WHERE THE SPIN AND SIZZLE ARE AS MUCH A PART OF THE PRODUCT AS THE PRODUCT ITSELF.**

  
JOE MANESE, EDITOR-IN-CHIEF

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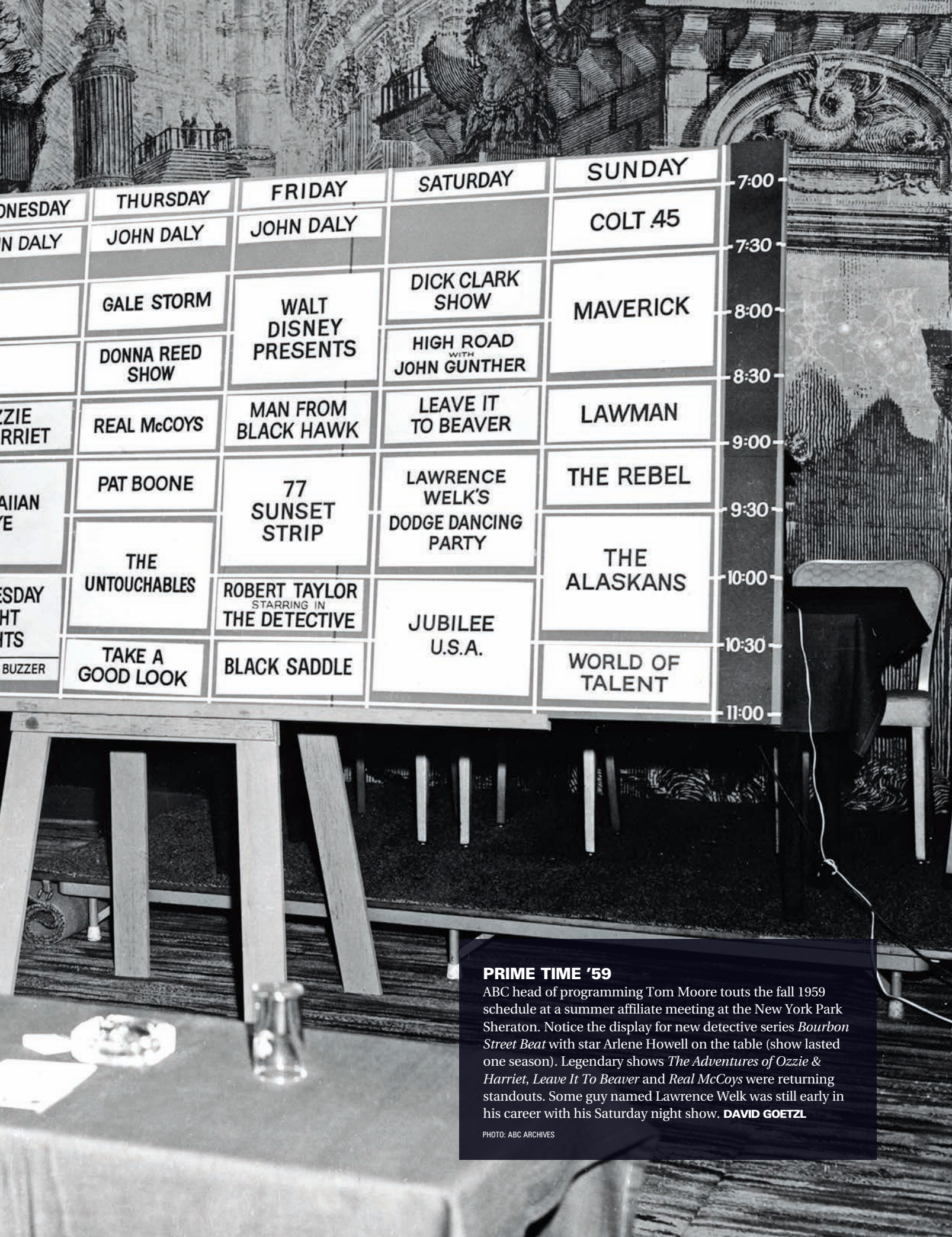
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EXIT

	MONDAY	TUESDAY	WEDNESDAY
7:00	JOHN DALY	JOHN DALY	JOHN DALY
7:30			
8:00	CHEYENNE	SUGAR-FOOT BRONCO	
8:30		WYATT EARP	OZ & HA
9:00	BOURBON STREET BEAT	RIFLEMAN	HAWAIIAN EYE
9:30		PHILIP MARLOW	
10:00	ADVENTURES IN PARADISE	ALCOA PRESENTS	WEDNESDAY NIGHT FIGHT
10:30	MAN WITH A CAMERA	KEEP TALKING	10 SECOND
11:00			



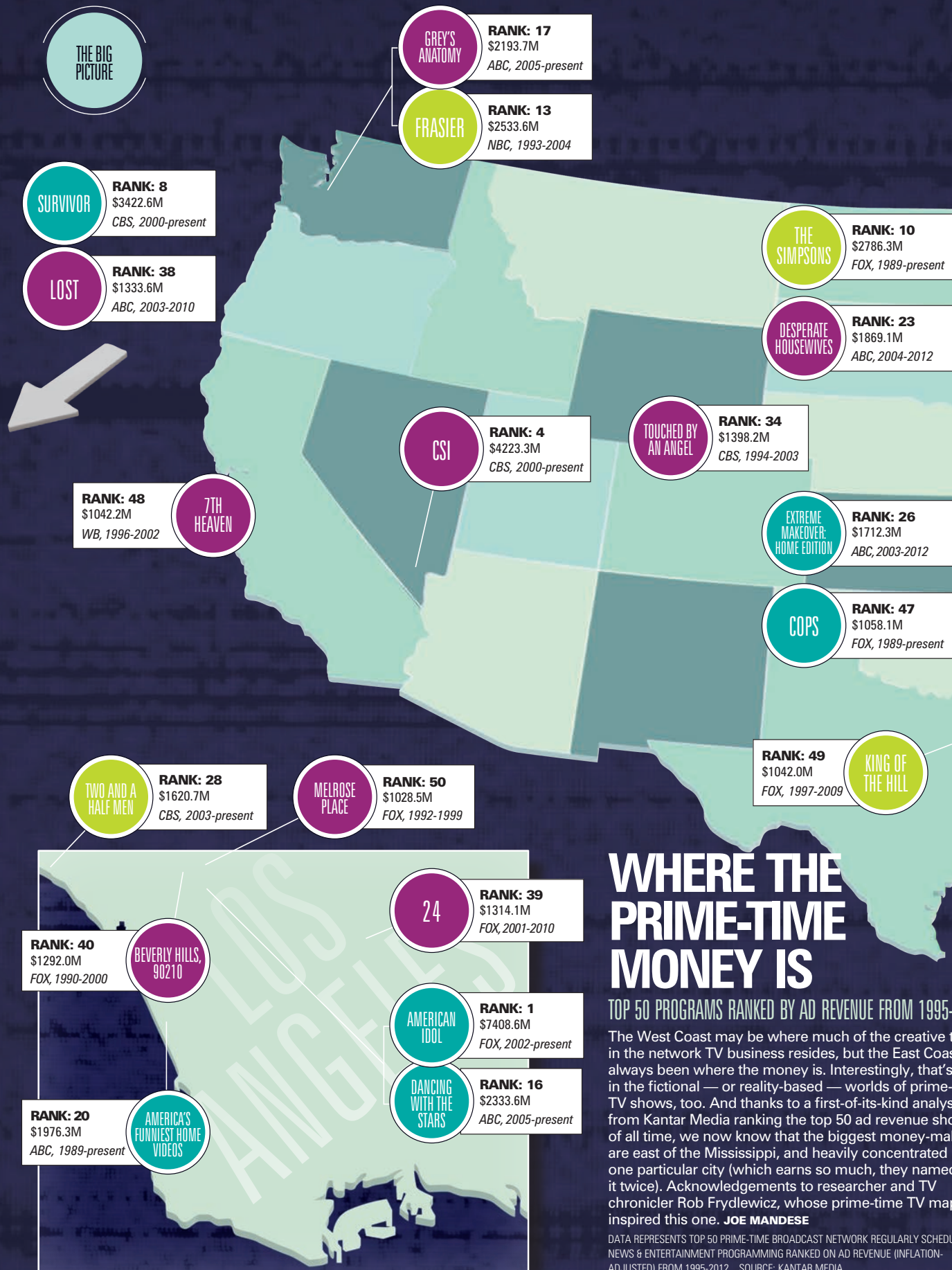


WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY	7:00
JOHN DALY	JOHN DALY	JOHN DALY		COLT 45	7:30
	GALE STORM	WALT DISNEY PRESENTS	DICK CLARK SHOW	MAVERICK	8:00
	DONNA REED SHOW		HIGH ROAD WITH JOHN GUNTHER		8:30
OZZIE & HARRIET	REAL McCOYS	MAN FROM BLACK HAWK	LEAVE IT TO BEAVER	LAWMAN	9:00
THE ALASKANS	PAT BOONE	77 SUNSET STRIP	LAWRENCE WELK'S DODGE DANCING PARTY	THE REBEL	9:30
	THE UNTOUCHABLES	ROBERT TAYLOR STARRING IN THE DETECTIVE		THE ALASKANS	10:00
BUZZER	TAKE A GOOD LOOK	BLACK SADDLE	JUBILEE U.S.A.	WORLD OF TALENT	10:30
					11:00

**PRIME TIME '59**

ABC head of programming Tom Moore touts the fall 1959 schedule at a summer affiliate meeting at the New York Park Sheraton. Notice the display for new detective series *Bourbon Street Beat* with star Arlene Howell on the table (show lasted one season). Legendary shows *The Adventures of Ozzie & Harriet*, *Leave It To Beaver* and *Real McCoys* were returning standouts. Some guy named Lawrence Welk was still early in his career with his Saturday night show. **DAVID GOETZL**

PHOTO: ABC ARCHIVES



# WHERE THE PRIME-TIME MONEY IS

## TOP 50 PROGRAMS RANKED BY AD REVENUE FROM 1995-2012

The West Coast may be where much of the creative talent in the network TV business resides, but the East Coast has always been where the money is. Interestingly, that's true in the fictional — or reality-based — worlds of prime-time TV shows, too. And thanks to a first-of-its-kind analysis from Kantar Media ranking the top 50 ad revenue shows of all time, we now know that the biggest money-makers are east of the Mississippi, and heavily concentrated in one particular city (which earns so much, they named it twice). Acknowledgements to researcher and TV chronicler Rob Frydlewicz, whose prime-time TV maps inspired this one. **JOE MANDESE**

DATA REPRESENTS TOP 50 PRIME-TIME BROADCAST NETWORK REGULARLY SCHEDULED NEWS & ENTERTAINMENT PROGRAMMING RANKED ON AD REVENUE (INFLATION-ADJUSTED) FROM 1995-2012 SOURCE: KANTAR MEDIA

**THAT '70S SHOW**  
RANK: 44  
\$1184.6M  
FOX, 1998-2006

**HOME IMPROVEMENT**  
RANK: 36  
\$1373.4M  
ABC, 1991-1999

**DREW CAREY SHOW**  
RANK: 27  
\$1671.5M  
ABC, 1995-2004

**HOUSE M.D.**  
RANK: 25  
\$1730.8M  
FOX, 2004-2012

**THE PRACTICE**  
RANK: 29  
\$1575.2M  
ABC, 1997-2004

**ALLY MCBEAL**  
RANK: 31  
\$1465.0M  
FOX, 1997-2002

**JAG**  
RANK: 41  
\$1292.0M  
CBS, 1997-2005

**EVERYBODY LOVES RAYMOND**  
RANK: 21  
\$1903.3M  
CBS, 1996-2005

**ER**  
RANK: 2  
\$6833.0M  
NBC, 1994-2009

**WILL & GRACE**  
RANK: 19  
\$2004.2M  
NBC, 1998-2006

**LAW & ORDER: SVU**  
RANK: 14  
\$2451.3M  
NBC, 1999-present

**SEINFELD**  
RANK: 22  
\$1880.7M  
NBC, 1990-1998

**20/20**  
RANK: 6  
\$3872.4M  
ABC, 1978-present

**X-FILES**  
RANK: 15  
\$2415.5M  
FOX, 1993-2002

**WHO WANTS TO BE A MILLIONAIRE**  
RANK: 11  
\$2579.3M  
ABC, 1999-2002

**PRIMETIME LIVE**  
RANK: 18  
\$2053.0M  
ABC, 1989-2012

**THE WEST WING**  
RANK: 30  
\$1547.8M  
NBC, 1999-2006

**60 MINUTES**  
RANK: 9  
\$2980.7M  
CBS, 1968-present

**DATELINE NBC**  
RANK: 3  
\$6232.2M  
NBC, 1992-present

**NCIS**  
RANK: 37  
\$1366.1M  
CBS, 2004-present

**48 HOURS**  
RANK: 45  
\$1108.8M  
CBS, 1988-2002

**CSI: NY**  
RANK: 33  
\$1406.03M  
CBS, 2004-present

**CRIMINAL MINDS**  
RANK: 43  
\$1189.3M  
CBS, 2005-present

**JUST SHOOT ME**  
RANK: 42  
\$1197.6M  
NBC, 1997-2003

**NYPD BLUE**  
RANK: 24  
\$1824.0M  
ABC, 1993-2005

**CSI: MIAMI**  
RANK: 12  
\$2552.6M  
CBS, 2002-2012

**FRIENDS**  
RANK: 7  
\$3774.0M  
NBC, 1994-2004

**WITHOUT A TRACE**  
RANK: 32  
\$1457.8M  
CBS, 2002-2009

**SPIN CITY**  
RANK: 46  
\$1071.7M  
ABC, 1996-2002

**LAW & ORDER: CRIMINAL INTENT**  
RANK: 35  
\$1388.0M  
NBC, 2001-2011

**LAW & ORDER**  
RANK: 5  
\$4032.1M  
NBC, 1990-2010

**KEY**

- Sitcom
- Reality
- News
- Drama



### MOOVERS AND SHAKERS

In 2008, Fox had cows grazing outside its upfront event at New York City Center to promote new sci-fi series *Fringe*, in which Dr. Walter Bishop, a mad scientist played by John Noble, always had a bovine in the corner of his laboratory. The show turned out to be a cult hit over five seasons. Fox says advertisers — who were probably equally intrigued and confused — still talk about the stunt. Makes sense. Midtown Manhattan can often feel like a zoo, but the animals normally just people nearly trampling each other. **DG**

PHOTO: FOX

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UPFRONT  
FLASHBACK



# THE TURNAROUND

*You never know. Sometimes betting it all on one show can pay off. Just ask Ford and NBC.*

**BY JOE MANDESE**

In the spring of 1984, Edsel Ford II, the Ford Motor Co. scion who was then head of marketing for the Detroit auto giant, assembled the top media buyers of his major ad agencies — Y&R, JWT and Wells Rich Greene — to come up with a strat-

egy to help turn around one of the worst sales periods ever in its history.

Ford's sales and market share were lagging, and the auto marketer wanted to come up with a strategy for the upcoming prime-time network TV upfront

advertising marketplace that would help it generate awareness and regain momentum.

During the meeting, the agency executives briefed Ford on the new prime-time schedules unveiled by the Big 3

broadcast networks, analyzed Nielsen TV ratings patterns for the various timeslots the new and returning shows would go into, and watched pilots and clips of the new shows to determine the best opportunities to place the company's upfront bets.

One of the shows caught Ford's eye — a pilot for a new family-oriented sitcom starring Bill Cosby — so he turned to his team of media buyers and made a surprising suggestion.

"I have a question here," he said. "I know you're the experts here, and we buy a lot of shows and put a lot of spots on those shows for our brands. What would happen if we just picked one or two shows and put all our spots on those shows for the year?"

The agency gurus — all veterans of the upfront network TV marketplace — proceeded to explain why Ford should not do that, explaining how audience reach builds by dispersing commercials across a broad mix of TV shows. They all agreed that it was not a good idea.

"Are you sure?" Ford asked. He noted that the new sitcom starring Bill Cosby was one that he "wouldn't mind owning," adding, "it's an interesting idea."

Despite his appeal, the agency execs convinced Ford it wasn't a prudent strategy.

"The selling share was a 25, and the buying share was probably a 23," recalls one of the buyers in the room, referring to the percentage of the prime-time audience *The Cosby Show* was projected to deliver when it joined NBC's Thursday-night lineup in the fall of 1984.

"It just wasn't a show that you'd think of making a big investment on," he noted, adding that the agencies then proceeded to implement a conventional upfront strategy, buying a mix of shows across the networks' new prime-time schedules.

"Flash ahead six months, and NBC puts this new show on at 8 p.m. and it does a 45 share," the buyer recalls, adding, "It changed television. And I don't think anyone who was in that room couldn't help but look back and wonder what would have happened if we owned three minutes in *The Cosby Show* and it

ended up being a 50 rating."

The agency execs couldn't have been more wrong. Had they gone with Ford's suggestion, they could have bought one of the biggest surprise hits ever in TV history for a fraction of what it would eventually cost when it led NBC's prime-time schedule.

"No one ever mentioned it again," says the buyer. "No one ever threw it in our face, but it was very humbling."

Such are the vagaries of prime-time television, where one breakout hit can transform a network — and potentially, a smart marketer's fortunes — the way *The Cosby Show* did for NBC.

When Bill Cosby started developing the show with producers Marcy Carsey and Tom Werner, NBC had just finished one of its worst seasons ever, and there was talk about the network unraveling altogether.

Only one of its series, *The A Team*, finished in the top 10 of the Nielsen ratings, and not one of the new series it introduced in the fall of 1983 — shows like *Riptide*, *We Got It Made* and *Manimals* (a series about crime-solving shape-shifters) — was coming back.

It was the low point for NBC and for its programming wunderkind, the late Brandon Tartikoff, who had only taken over the network's top programming job from Fred Silverman a couple of seasons earlier. But despite NBC's dismal prime-time performance, Tartikoff seemed surprisingly upbeat as he handed out special T-shirts at a meeting of the network's

affiliated stations that year. The T-shirts had the NBC logo on it, with the words "No Prisoners" emblazoned above it.

The reasons for Tartikoff's cockiness was Bill Cosby's new show, which not only was one of the highest-testing pilots ever for the network, it was generating buzz from everyone who saw it.

"It was the only time I remember everyone trying to get a copy of the pilot," recalls Horst Stipp, a former top research executive at NBC who is now an executive vice president of the Advertising Research Foundation. "The buzz surrounding it was off the charts."

You wouldn't know this from the understated way Cosby introduced the show to the affiliates — as a series about the Huxtables, an upwardly mobile African-American family living in New York's Brooklyn Heights. "We're going to tell some jokes," he said.

In the end, it was Tartikoff and NBC who were laughing their way to the bank when *The Cosby Show* defied the laws of prime-time TV ratings erosion, proving that breakouts were still possible and a single highly rated series could turn an entire network around.

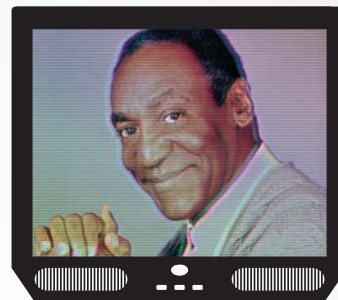
After premiering on Thursday Sept. 20, 1984, *The Cosby Show* went on to run for eight seasons, becoming a tentpole for NBC's entire schedule, and laying the foundation for its "Must-See TV" Thursday night scheduling, which would include some of the highest-rated, most in-demand, and biggest ad-revenue-generating shows in television. **W**

#### UPFRONT REWIND

### Thanking Bill Cosby for NBC's Return

Former NBC advertising chief Bob Blackmore walked on stage in the 1980s at the Waldorf Astoria in New York City and said: "I want to personally thank the man that turned around NBC."

Then entertainment chief Brandon Tartikoff walked on stage and Blackmore approached. But, Brad Adgate, senior VP and corporate media director of Horizon Media, remembers: "At the last minute Blackmore walked around Tartikoff and shook Bill Cosby's hand."



# STAYING

**Long-term, TV's big broadcast networks** need much to maintain their continued viewer and advertising dominance: More hits, perhaps a slowing down of TV viewer erosion, and building new digital platforms that attract meaningful advertising revenues.

In the short term, TV executives have more specific hurdles — like getting a strong reality show franchise, possibly a night of decently performing comedies,

younger viewership, and possibly a compelling serial drama like *24* or *Lost* where nonstop original episodes keep viewers tuned in for 13 weeks in a row.

If that isn't enough to deal with, TV programming and scheduling dynamics keep changing and/or losing their effectiveness.

For example, new shows continue to get less help from existing lead-in programming — shows that now have less-than-strong ratings, be it *Survivor*, *Grey's Anatomy*, or *Two and a Half Men*. Fewer TV viewers sample new shows because of this trend. Even in the age of time-shifted viewing, the lack of a lead-in show is important, especially for the fifty percent of the country that doesn't have traditional DVR technology.

# POWER

*How strategic programming and expanding genres can reel in the ratings* BY WAYNE FRIEDMAN

Only a select few shows can give a fairly predictable lift to a new series. Brad Adgate, senior VP and corporate media director for Horizon Media, says this small list includes Fox's *American Idol*, NBC's *The Voice*, ABC's *Modern Family* and CBS's *The Big Bang Theory* and *NCIS* franchises.

TV executives also have to deal with another bit of fading traditional TV strategy for the other 50 percent of U.S. TV viewers that have new time-shifted technology. "Appointment viewing is disappearing," says Adgate. Everyone can watch later — on DVR machines, video-

on-demand services, or digital entertainment platforms, he says.

From all of this, TV networks continue to look for more risk to excite viewers with big TV "events." And with that comes big failures — from Fox's *Terra Nova* of a year ago to, most recently, ABC's *Zero Hour*.

"For this pilot season, broadcast networks' log lines for shows remind me of movies," says David Scardino, entertainment specialist for Santa Monica, Calif.-based media agency RPA. And that can be a problem. He adds: "If you are going to sustain a show for 22 weeks of a

season, shows almost have to be vague to a certain extent. Many premises are too closed-ended. 'So what happens after he finds her killer?' It basically all comes down to execution."

Continuing broadcast erosion, anywhere from 3 percent to 7 percent in many ratings metrics, as well as competition from strong original cable programming, are forcing tough decisions.

Broadcast networks have their work cut out for them. Here's a report card for broadcast networks and some selected cable networks — where they stand now, and what they need.



# NBC

**The long-time number one leader — and industry leader in the 1990s — lost its way starting in the new millennium.**

Finally in the spring 2011, things started to turn around with a new singing reality show *The Voice*, as well as promising results for music-oriented scripted drama *Smash*. This continued into fall 2012, when *The Voice* continued its high rating level, coupled with super ratings from *Sunday Night Football* and new drama *Revolution* (which aired right after *The Voice*).

NBC, for the first time in nearly a decade, was back on top in the 18-49 rating race last fall.

It proved to be short-lived. Early results for this year have NBC has now slipping — not just to second or third place — but to the bottom the broadcast networks ranks in recent weeks. *Smash* crashed without a strong *Voice* lead-in, and a new drama *Do No Harm* totally mis-fired, and was cancelled after two episodes. Early decent fall results of its comedies: *Go On* and *Guys With Kids* have also stalled.

Some positives: NBC is still younger-skewing than CBS or ABC, evidence from its Thursday comedies.

Another plus: In an ever decreasing world of prime-time viewership to advertising and promote new TV shows, NBCUniversal — more than any other network group — have over a dozen cable networks on which to promote its broadcast network shows.

What does NBC need now? For many analysts, NBC needs old-fashioned program *anchors* — at 8 p.m. and at 9 p.m. on many nights — that can help launch new shows. Can *Revolution* be one? So far it has performed decently in a 10 p.m. Monday time slot. For example, it earned a 2.2/6 on its April 1 original, tying ABC's *Castle* for the top spot.

Season-to-date numbers still have NBC in second place through March 31 at a Nielsen 2.4 live plus seven day average rating among 18-49 viewers, down 8 percent versus a year ago.

# ABC SCANDAL

Scandal is a breakout hit; below, season 16 of *Dancing with the Stars*

**The ABC network has had an up-and-down couple of years.** Recently, it has been up of sorts. Quietly, it was the number one network in C3 ratings for the fall when looking at non-sports prime-time programming.

The bad news is, all networks — including ABC — have seen declines versus their year-ago ratings results. For ABC, one problem is that *Dancing with the Stars* continues to flag.

The good news: The show can be a wild card. Brian Hughes, senior VP and head of audience analysis practice for Magna Global, says, “When you have the right cast, it can always bounce back. Look what happened with Bristol Palin.”

One consideration for ABC might be to finally seek more men viewers — possibly with more straight-ahead crime procedurals. More than most networks, ABC has a bunch of female-oriented prime-time serials/soaps, as well as *Stars* and *The Bachelor* franchise.

Other industry executives disagree: “ABC was extremely female a few seasons back with *Desperate Housewives* and other shows,” says Hughes. “And it did well.”

Sam Armando, senior VP and director of strategic intelligence for Starcom Mediavest Group Exchange, says ABC needs to take a scheduling lesson from the likes of CBS where the network can make gains. For example, it should consider replacing one lower-rated but still performing show, with another better-viewed network show — all to make for a better night.

“Maybe you could move *Grey’s Anatomy* from Thursday to Monday night at 10 p.m., replacing *Castle*,” he says. Through the fourth quarter 2012, *Grey’s*

was doing a 3.9 Nielsen C3 rating; *Castle*, a 1.98. Even if *Grey’s* continues lose a bit more in ratings next year, moving it to *Castle’s* Monday time slot might work.

Armando says *Scandal*, which came on line mid-season last year, looks good: “Audience-wise it’s got momentum. It kind of reminds me of CBS’s *Person of Interest*.” He says this is where fall ratings for the CBS show grew after starting up in the spring.

ABC sits in fourth place, down 8 percent to a 2.3 average Nielsen live plus seven day season to date rating among 18-49 viewers.



## UPFRONT REWIND

### Chevy Passes on a Smash

Lou Schultz, the former vice chairman of Campbell Ewald and CEO of Initiative, recalls seeing *M\*A\*S\*H* at the upfront and wanting to bet on it. So, his agency tried to convince Chevrolet to sign on as a sponsor. But at a pilot screening, General Motors executive John DeLorean nixed it. “We’re 30 seconds into the opening credits, DeLorean gets up and says, ‘We’re not going to sponsor some show about war,’ and walked out of the room,” Schultz said. It was a sensitive time during the Vietnam era, but GM passed on a prime placement in a huge hit.

Years later, Chevy didn’t make the same mistake. Schultz had a chance to get an exclusive spot in the 1983 series finale. Chevy took six spots and it was the highest rated series-ender in history — 106 million viewers.





# CBS



**CBS has been the model of consistency for years** — all a big lure for national advertisers who like TV platforms they can count on.

Making fewer programming moves year in and year out than other networks helps CBS compete against other less consistent networks.

For example, RPA's Scardino says C3 ratings for all 24 new broadcast shows in the 2012-2013 season so far have been down 22 percent in 18-49 viewership versus the 37 new shows of a year ago. But 86 returning network shows this season are only down 3 percent versus returning shows of a year ago. Among total viewers, new shows this year are down 18 percent from new shows of a year ago; this year's returning shows down just 1 percent.

Unlike other networks, CBS has deft at the difficult process of launching comedies — 2 *Broke Girls* and *Mike & Molly* in particular. But this year Adgate says all networks have suffered in the

new comedy program department. CBS had to drop new show *Partners* from its powerful Monday night comedy lineup shortly after [failed] liftoff.

CBS does have its soft spots — especially on Friday nights. "That is where they have struggled the most," says Magna Global's Hughes. CBS tried to bolster Fridays at the start of the season with *Made in Jersey*, about a street-smart young woman attorney from a working class background, working in a New York law firm. It was pulled after only two episodes.

Right now the network has been struggling to find a companion to existing shows *CSI: New York* and *Blue Bloods*. CBS has recently launched *Golden Boy* about the youngest ever New York

City Police Commissioner.

CBS is currently the 18-49 leader among the broadcasters through March 31, with a 3.0 Nielsen season-to-date live plus seven day average rating, down 3 percent from a year ago.



Short-lived *Partners*; *Golden Boy* (above)



*The Following*, starring Kevin Bacon is doing well.



**Mini-broadcast network CW is now a different kind of programmer** — one that depends on time-shifting or digital next-day viewing, as well as lucrative revenue from Netflix, which gets to run CW's shows on a season-delay basis.

During the upfront 2012, executives



**Fox's past success may be difficult to compete with**, especially for consumers who expect big and bold buzz-worthy programming like *American Idol*.

A year ago Fox finally seemed to be on its way. For the first time ever, it figured out its annual fall programming and scheduling problem — this coming with the usual disruption of Major League Baseball's playoffs and World Series.

With the debut of *American Idol* wannabe, singing competition show *The X Factor*, as well as good results from new shows *New Girl* and highly touted sci-fi adventure *Terra Nova*, it won the fall

2011 period among 18-49 viewers.

But now Fox is on the back-foot again. *Terra Nova* is gone. Though *Nova* was a top ten show among certain demos, says Scardino, it was too expensive for its modest rating level. Fox's other strong fall 2011 debuting shows, *X Factor* and *New Girl*, have seen lower ratings this year.

The positives: *American Idol*, while slipping, hasn't descended to the depths of other shows. Also it can still give a boost to new shows. And though *X Factor* didn't become the big blockbuster a la *Idol*, it continued to earn decent viewership for the fall.

Recently Fox has struck some decent ratings with new series *The Following*, a show about serial murderers. Not only was its series debut higher than the lead-in ratings from *Bones* on Mondays, but Fox scored higher ratings for its second original show — a rare occurrence for any new broadcast network show.

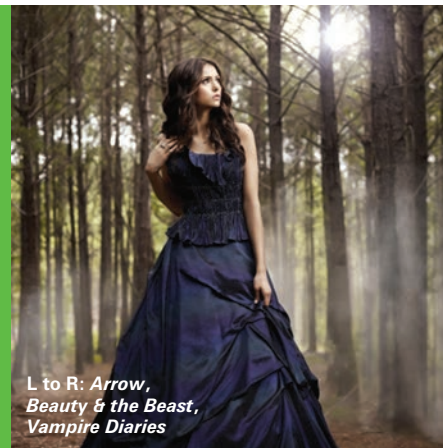
That's good news, says Magna Global's Hughes: "Reality stuff will carry you for a while. In the end, scripted TV is the real bread and butter of the networks."

Fox is down some 24 percent in 18-49 viewership season to date through March 31 to a 2.5 average primetime rating.

# FOX



# CW



L to R: *Arrow*, *Beauty & the Beast*, *Vampire Diaries*

said, the young-skewing, mostly women 18-34 network's aim was to expand its audience — slightly — going after some older viewers and young men. One of its big promising shows this season has been the more male-focused *Arrow*.

As a consequence of this and other fac-

tors, CW isn't an entire "young"-skewing network. CW median age is 40 years, says Horizon's Adgate.

SMGX's Armando says *Vampire Diaries* is doing well, with *Beauty & the Beast* less so. But he says: "They should continue to focus on 18-34." That's because, he says, it

does a good job in attracting new viewers who are using new digital media, whether that's DVRs, VOD, digital, or xBox.

CW has dropped 13 percent in Nielsen live plus seven day ratings, season to-date through March 3 to a 0.7 average primetime rating through March 31.

PHOTOS: CLOCKWISE FROM TOP LEFT: ADAM VALENZUELA; COURTESY FOX; JEFF STRASBERG/FX; CW; BEN MARK; HOLLAND THE DIV; AND HOWARD THE DIV; COURTESY CBS

# CABLE

**Overall cable network viewership continues to climb.** But this upsurge isn't among the top 10 or even top 20 networks. "All the growth in cable is coming from below the top 25 networks," says RPA's Scardino.

Still, a few have managed to make the move to a top cable status — especially for History with the likes of *Pawn Stars*. Reality TV is as dominant as ever for some networks — giving the likes of A&E, Bravo, E!, Discovery and Comedy Central strong identifiable brands.

Strong scripted cable TV programming has been the real story in recent years, especially with the likes of AMC Network's



Kurt Warner in USA's *The Moment*

**USA Network, which has been the perennial leader when looking at 18-49 viewers and overall viewers,** has been subject to some viewership erosion. For example, in 2012, its primetime viewership was down 8 percent from the year before to 2.9 million viewers.

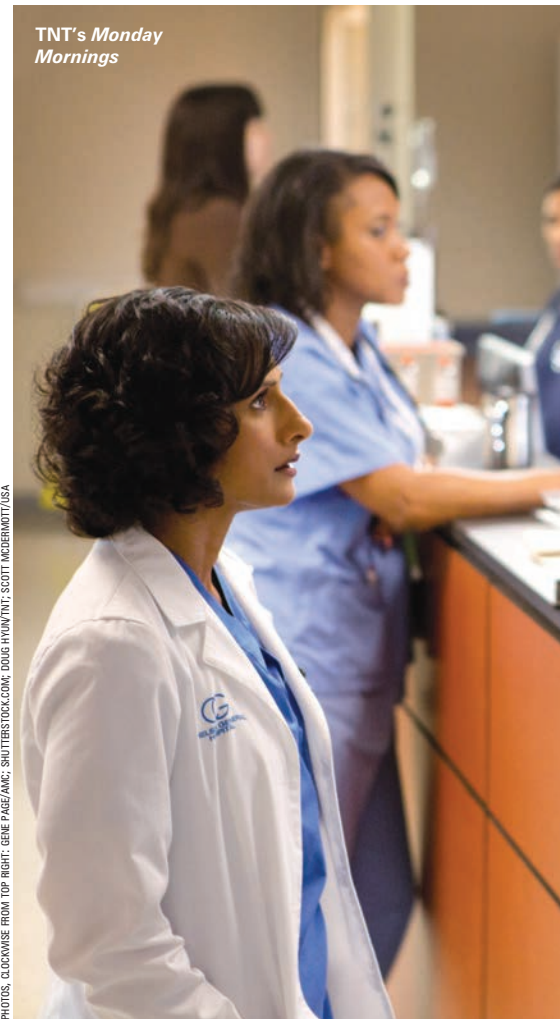
Building its success on shows like *Royal Pains*, *Burn Notice*, *Suits*, and *White Collar*. USA's recent focus has been to develop dramas with a strong fun — some might say *sunnier* — component to their story lines.

"USA shows are kind of charming, but they are in a narrow zone of a sweet spot," says RPA's Scardino. "They are *drama-dies* in a way."

USA could look to expand beyond these boundaries. Already it's readying a reality show, an aspirational-themed effort called *The Moment*, starring former NFL quarterback Kurt Warner.

Other analysts suggest USA's marketing tagline "Characters Welcome" gives the network a perfect opening for future programming expansion. Says SMGX's Armando: "I wouldn't be surprised if they started trying to do some comedies."

# USA



TNT's *Monday Mornings*

PHOTOS: CLOCKWISE FROM TOP RIGHT: GENE PAGE/ABC; SHUTTERSTOCK.COM; DOUG HYUN/MT; SCOTT MCCLERNOTT/USA

*Walking Dead*, where some episodes have actually beaten broadcast networks' fare.

SMGX's Armando says some cable dramas — AMC's *Dead* and *Mad Men*, FX's *Sons of Anarchy* to name a few — have seemingly defied TV rating logic. These cable shows can be off the air for months, or over a year, and come back to virtually the same viewership. When broadcast networks do this, Armando says, their shows fail miserably.

While cable networks have indeed been a spur in the side of the broadcast networks, cable hasn't been immune to broadcast-like problems: Many established cable networks have seen similar viewership erosion in recent years.



Unlike USA, TNT has a different problem — that of its tagline: “We Know Drama.”

SMGX's Armando says this could pigeonhole the network. Unlike USA, it can't in theory, do much comedy — though possibly some reality shows. Top-rated dramas like *Rizzoli & Isles*, *Major Crimes*, and *Perception* are pretty much straight-ahead crime procedurals.

*Leverage* may be one of their “lighter” dramas, like those you might see on USA. Recently TNT also added another straight-forward drama, David E. Kelley's *Monday Mornings*, a medical show that reviews specific patients, procedures and stories.

TNT was down 3 percent to 2.2 million total viewers at the end of last year.

#### UPFRONT REWIND

### Fox's Water-Logged Upfront

Fox had its first upfront presentation at New York City's Central Park boathouse, but didn't go very far. “It was an absolutely horrible rainy night and you had to walk through Central Park to get there,” recalled former GroupM media executive Marc Goldstein.

“I don't think Jamie Kellner [president of Fox Entertainment] got 10 minutes into it when there was a glitch in the electronics. And then another, and another. Finally [News Corp's chairman] Rupert [Murdoch] told Jamie to shut it down.” Fox executives took all of this in stride, said Goldstein.

“The Fox salespeople came around the next day with T-shirts that said, ‘I survived the boathouse.’”



### TBS benefited greatly this year by scheduling a lot of *Big Bang Theory* reruns.

While all this is well and good, Magna's Hughes said, at issue is what development comes down the road. TBS did add original episodes of *Cougar Town* this season — coming from ABC — and is relying less on Tyler Perry-penned comedies.

Comedies have always been hard to do — and sustain. That said, once they are successful, a network can have them on a long time. “Good sitcoms are like comfort food,” says RPA's Scardino.

With *Big Bang Theory* doing well seemingly everywhere — on CBS, in TV station syndication — overall *Bang* awareness has contributed to giving TBS strong overall viewership. It has seen a rocketing 20 percent climb in prime-time viewership to an average 1.9 million viewers at the end of 2012.

# TBS



Cougar Town

#### UPFRONT REWIND

### Sweetheart No More

The dynamics of the upfront marketplace have changed markedly, Steve Grubbs says. These days with a handful of media behemoths doing deals and executives moving around, there isn't as much variation in the CPM increases agencies pay. There isn't much going in the way of beating the market — not much to brag to clients about. “Back in the '80s and '90s, you could see much larger gaps ... one agency might negotiate a 12 percent increase for their clients with ABC and another agency would be at 16 or 17 percent ... I'm not saying it wasn't done, but it was difficult for anybody to really negotiate a deeply discounted sweetheart deal after a certain point.”



Don Cheadle on *Totally Biased with W. Kamau Bell*

# FX

Known for its grittiness, with the likes of *Rescue Me* and *Nip/Tuck*, FX always has had an edge. But looking behind this, the News Corp. entertainment network actually has a broader mix of programming.

FX not only has cutting-edge dramas, which typically get critics' attention, such as *American Horror Story*, *Sons of Anarchy*, and *Justified*, but comedies as well: *It's Always Sunny in Philadelphia*, *Anger Management*, *Louis*, animated comedy *Archer*, as well as off-network comedies *Two and a Half Men* and *How I Met Your Mother*.

It even does reality/talk — *Totally Biased with W. Kamau Bell* and *Brand X with Russell Brand* — as well as airing theatrical movies.

Magna Global's Hughes says FX may be in somewhat of a better position than many of the other cable networks as “They have a nice balance.” FX primetime ratings drifted lower by the end of 2012, down 8 percent to 1.4 million average viewers.

PHOTO: TOP: GREG EUBANK/FX NETWORK CENTER; DARRIN MICHAELS/TBS; BOTTOM: NBC



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Source: Nielsen 2011, Captivate Office Pulse



HISTORY



*Under the • Big Top*  
Confessions  
of



# an Upfront Reporter

*NUDG, NUDG, Wink,  
Wink* BY JOE MANDESE



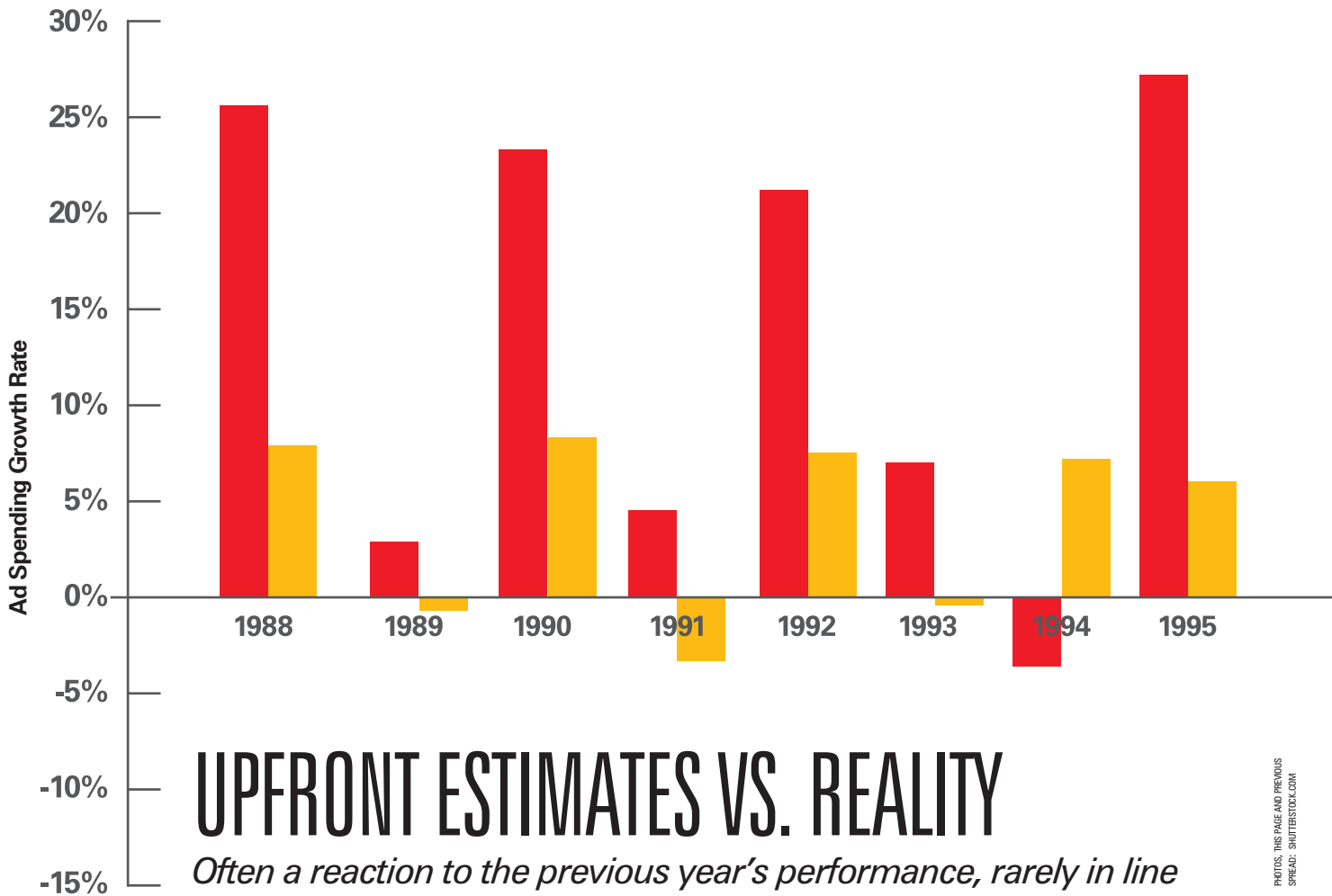
**Twenty-five years ago, I began writing a story just like this one.** The article, for the now-defunct *Marketing & Media Decisions* magazine, was about the role the annual upfront network television marketplace plays in priming the media pumps on Madison Avenue.

Since the story was going to be featured on the cover, my editor asked if I could think of something good to illustrate it, so I asked Bob Blackmore,

then head of sales at NBC, if he wouldn't mind posing for a "power lunch" photo with a big shot agency media executive. As it so happened,

Blackmore said he was planning a trip to Chicago to meet the late Willard Hadlock, who was then head of the media department of Leo Burnett, the precursor to Starcom and one of the biggest buyers in the upfront marketplace. The meeting proved to be more than a photo op. While Blackmore and Hadlock dined, they also talked business, and the first deal of the upfront buying season was cut.

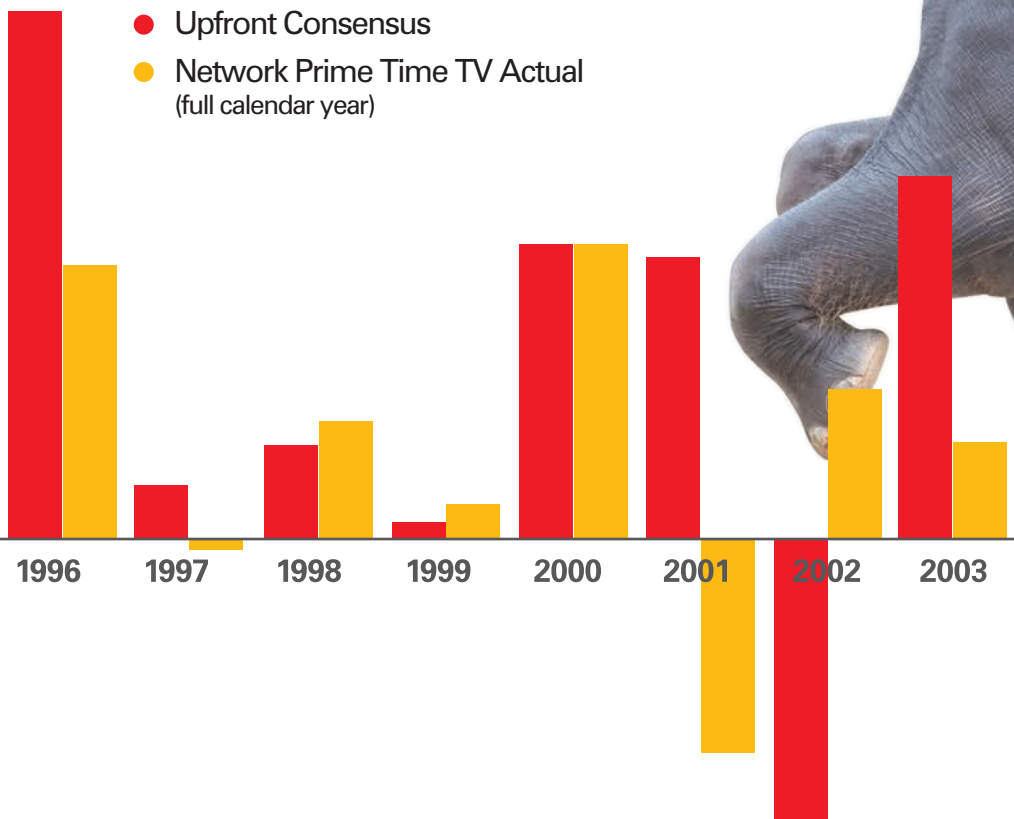
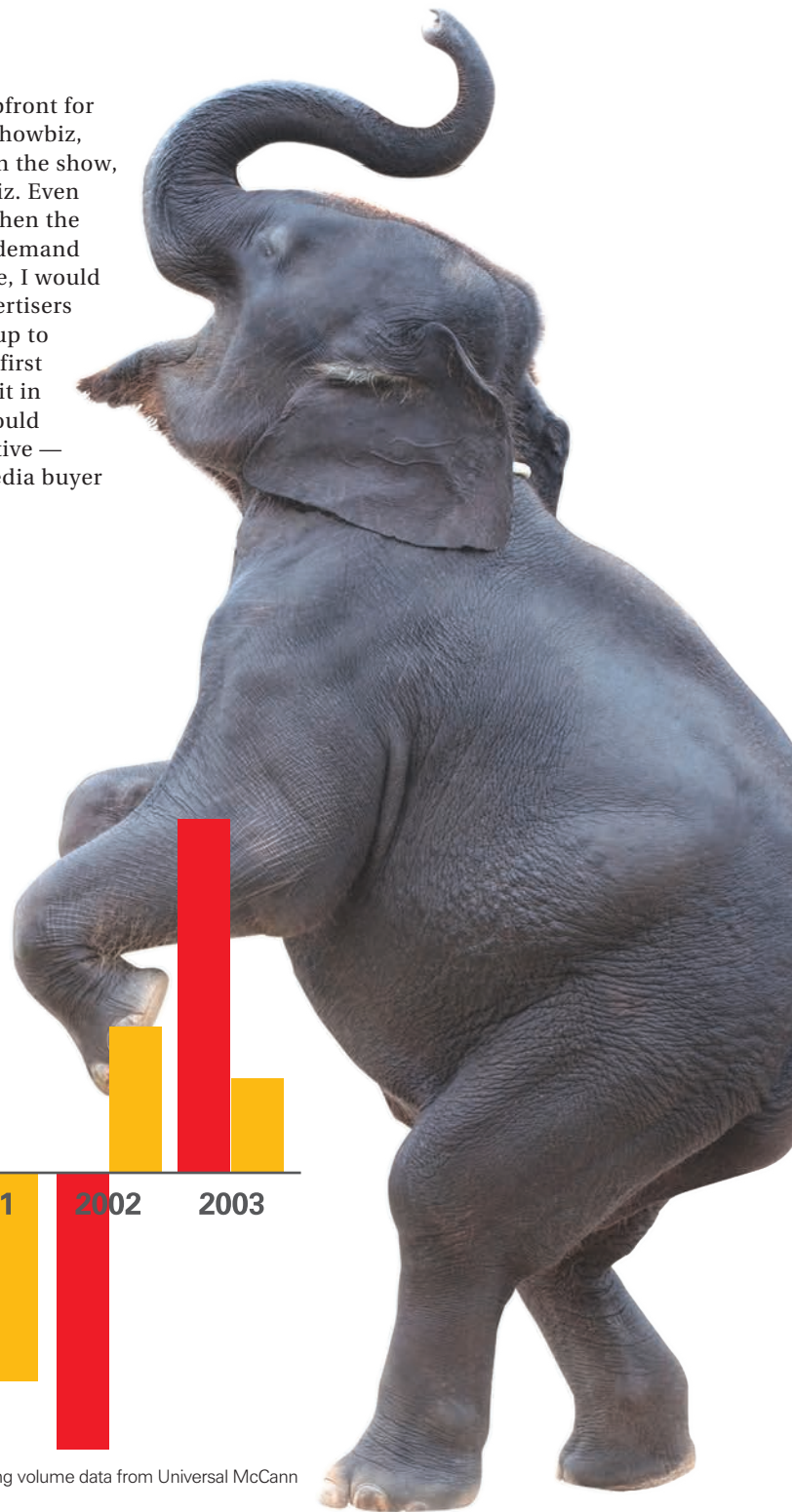
I share this memory because it says volumes about Madison Avenue, and the almost apocryphal role the upfront plays



not just as a business practice, but as one of its fundamental cultural rites. As a business practice, the upfront may be unique among industrial marketplaces. Hundreds of millions of dollars can get spent literally over a lunch and with no more contractual requirement than a handshake. In terms of culture, there are few things that occupy the attention of the ad industry — except maybe the Super Bowl and the Cannes advertising festival — as much as the upfront does.

And I will confess that it took me a while to truly understand — and

appreciate — the upfront for what it actually is: showbiz, with an emphasis on the show, as opposed to the biz. Even in its down years, when the laws of supply and demand favored the buy-side, I would watch as major advertisers and agencies lined up to participate. For the first few years I covered it in the early 1980s, I would watch as one executive — Ralston Purina's media buyer



Source: Upfront growth estimates from Merrill Lynch and advertising volume data from Universal McCann



Paul Schulman — would routinely proclaim “the first buy” of the upfront season, as if it were a bragging right. Whether it was up or down, one thing you could say about the upfront is it has almost always had momentum — and, more often than not, it has been to the networks’ advantage, creating a lemmings-like dash to buy ads on the best prime-time shows, before they “sell out.”

And even though I have had a front-row seat at the process, it took me years to understand why it functioned that way.

The first time I realized something was wrong with the upfront was as a rookie reporter covering the 1983-84 marketplace. Only a few weeks into the job, I started getting calls from Wall Street analysts asking me how the market was going. I remember thinking, “Aren’t I supposed to be asking you?” A few years later, the pattern started to make sense. It goes something like this.

1. Anonymous network executives tell trade reporters how much upfront prices and volume are increasing.
2. Trade reporters run those increases by anonymous media buyers, who have a stake in seeing inflated estimates published so they look like they got a good deal for their clients.
3. A consensus for upfront volume and price increases begins to coalesce in the trade press and major newspaper ad columns.
4. Wall Street analysts issue equity research reports sanctifying the consensus as financial fact.
5. Even before the new television season begins, some of the upfront orders that have been put “on hold” get adjusted.
6. Once the new season starts, some of the shows purchased in the upfront get canceled, and those replacement series become part of the buys.
7. Depending on the strength of the quarterly “scatter” markets, some



PHOTOS: SHUTTERSTOCK.COM



IT TOOK ME A WHILE TO  
TRULY UNDERSTAND —  
AND APPRECIATE —  
THE UPFRONT FOR  
WHAT IT ACTUALLY IS:  
**SHOWBIZ,**  
WITH AN EMPHASIS  
ON THE SHOW,  
AS OPPOSED TO  
THE BIZ



upfront advertisers may exercise some of their cancellation options, effectively revising the original upfront take, though no one is around to report on that. (Upfront advertisers generally have the right to cancel up to 25 percent of their first quarter, and up to half their second and third quarter buys.)

8. The sum of firm upfront orders, program cancellations, options exercised, and scatter deals alters the network marketplace, and price and volume increase dramatically from their upfront starting points.

I watched this process for more than a decade before I came across some bona fide numbers to compare it with. The data, which was self-reported by the networks to auditors who compiled it for the Broadcast Cable Financial Management Association, isn't exactly gospel, but it's generally considered to be in the ballpark and it was the only data I had available to me at the time I did the analysis, though the BCFM has since discontinued releasing the data publicly.

So what did the analysis show? That over a 16-year period I could access data for, the network prime-time upfront marketplace was reported to grow an average of 10.7 percent. During the same 16-year period, actual network prime-time revenues — as reported by the BCFM — grew only 4.2 percent.

Yes, the actual revenues reflect the sum of upfront cancellations, makegoods for ratings under-delivery, scatter sales, and other factors, but that still doesn't account for a three-to-one disparity between how people reported the prime-time marketplace was growing during the upfront, and how it actually grew.

After conducting the analysis, I concluded that the upfront was more a market-shaping myth than a real economic indicator. Smoke, mirrors, sizzle and stampede, all designed to get people — and their ad budgets — moving. So I was confused the following year, when CBS issued a press release — the first and only one I ever remember a network distributing

— about its upfront take. How, in this era of post-Sarbanes-Oxley corporate financial accountability, could a big corporation like CBS release financial estimates that were, how should I put it, written more with pencils than with indelible ink? That's when it hit me that the upfront numbers must be so unreal, that no one — not even CBS shareholders — would take them seriously as a financial metric.

Still the upfront numbers soothing has continued, as have other questionable practices associated with the upfront, including the fact that it could well be the only marketplace where the sellers ask the buyers to “register their budgets” with them beforehand so that they can price their inventory most efficiently. The networks say they do this, and media buyers comply with the request, under the auspices that it is the only way to ensure that all the advertisers and agencies will get all the commercial time in the shows they want. Not because it is a method for the networks to “count the house,” model demand, and optimize their yield based on it — as observers in most any other market might conclude from such practices.

Amazingly, it is none of these practices — not the smoke and mirrors dance, not the mythical growth projections, not the

ONLY A FEW WEEKS INTO THE JOB, I STARTED GETTING CALLS FROM WALL STREET ANALYSTS ASKING ME HOW THE MARKET WAS GOING. I REMEMBER THINKING, “AREN'T I SUPPOSED TO BE ASKING YOU?”

**UPFRONT REWIND**

**Final Curtain Call**

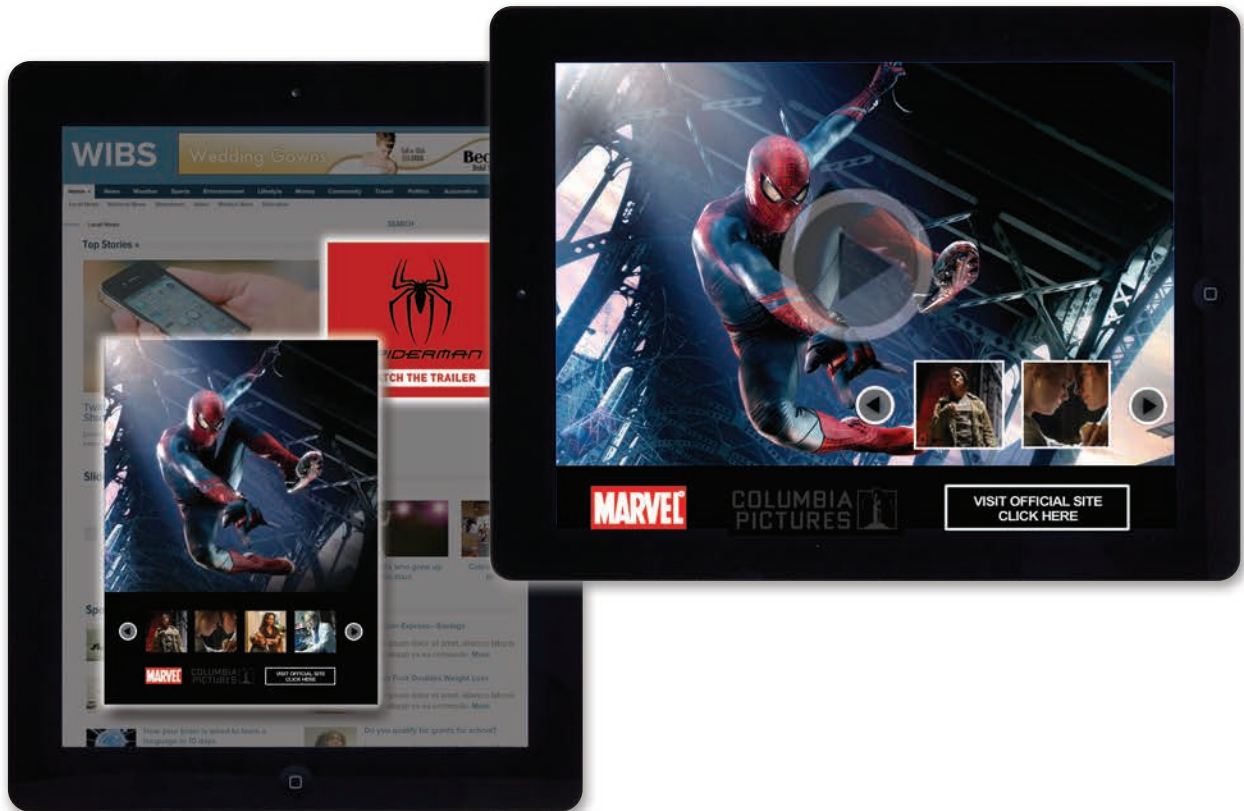
Talk about an upfront shocker. In 1991, media types were considering the prospects for new shows and enjoying the entertainment, including a bit from a certain well-known comedian. Then, out of nowhere Johnny Carson chose that moment to announce his impending retirement from *The Tonight Show*.

Executives at NBC were even caught off guard. “The audience gasped,” David Marans, a veteran industry researcher who was there, said.



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compilation of sellers' own budgets — that has stuck in the craw of Madison Avenue. What really gets people all worked up about the upfront, is that the upfront gets people all worked up. By that, I mean, stampeding, rush-to-market techniques the networks use to put their inventory up for sale.

**Over the years I have heard a fair amount of grousing about those tactics,** but it wasn't until it erupted into industry coalition status in spring of 2004, that I saw anyone actually try and do anything about it. That coalition, dubbed NUDG (the unfortunately named acronym for the Network Upfront Discussion Group), was kick-started by a panel at an Association of National Advertisers conference that culminated in a five-hour summit of major advertisers, agencies and network sales executives — and their lawyers — where they discussed everything from opening and “closing bells” to frantic wee-hour deal-making over cold pizza. NUDG's conclusion: The upfront works just fine, and nobody needs to do anything about it.

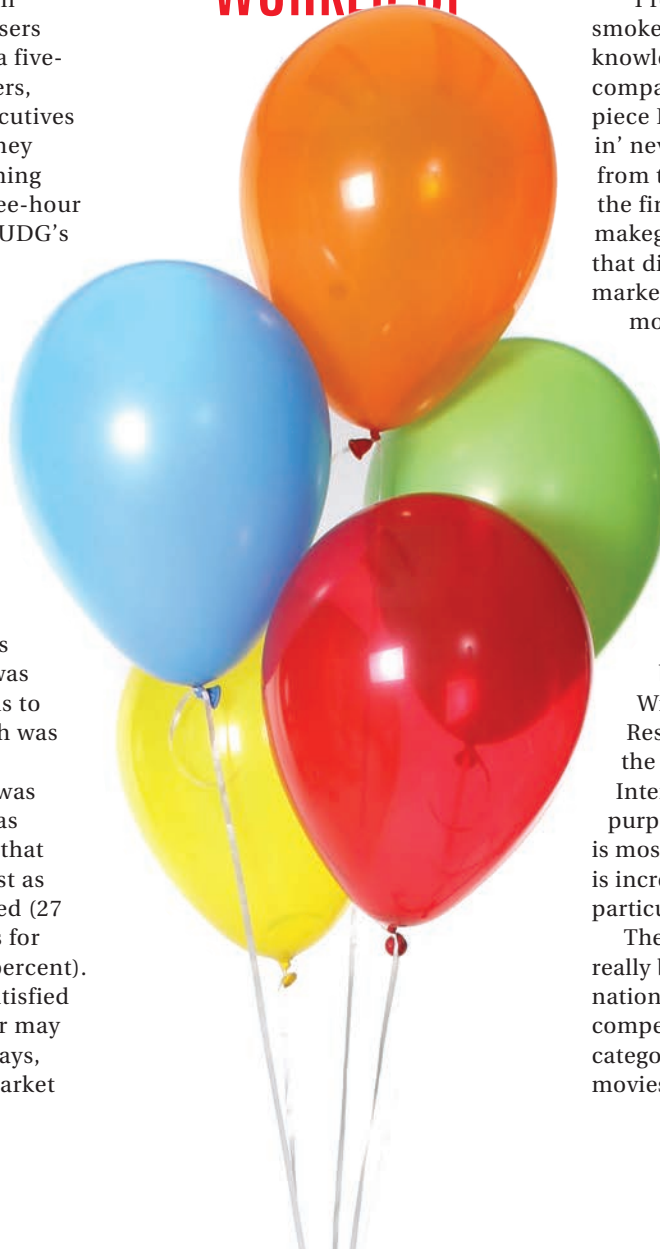
"While not a perfect process, the current processes in place were generally acceptable — were essentially optimal, and they will continue as is," Bob Liodice, president-CEO of the ANA, said following the meeting.

"It's not to say that in the end that everybody was thrilled or is absolutely satisfied, but there was not sufficient enough consensus to say that an alternative approach was better or worse."

In other words, the upfront was status quo. That equilibrium was underscored by an ANA survey that same year, which found that just as many national advertisers agreed (27 percent) that the upfront works for them, as those who didn't (27 percent).

It's difficult to say how dissatisfied advertisers and agencies may or may not be with the upfront these days, because so many advertising market

## WHAT REALLY GETS PEOPLE ALL WORKED UP ABOUT THE UPFRONT, IS THAT THE UPFRONT GETS PEOPLE ALL WORKED UP



conditions have changed. While TV still represents about two-thirds of the advertising budgets of big advertisers and agencies, it is spread over many more networks, and many big advertisers seem more concerned about digital media — especially social — than they do with when, how and why they buy their network TV time.

That said, people I hold a great deal of respect for in the industry assert that the upfront is more than just smoke, mirrors and cattle prodding. They say it provides some important structure for the overall media marketplace that enables big advertisers and agencies to manage their businesses — while enabling the networks to stay in theirs.

"I really disagree with you on smoke and mirrors," one particularly knowledgeable source at a major TV company told me when I described this piece I was writing. "As far as 'going in' never matching the 'coming out' — from the initial consensus reports, to the firming up of holds, cancellations, makegoods, and all the other things that dilute the realness of it as a market — have you ever refinanced a mortgage? Have you ever bought something with a guarantee that required repair? Have you ever bought an airline ticket and canceled it? Have you ever bought something that required a refund?"

### **Revisionism aside, others believe the upfront plays a more practical role.**

"It does serve a genuine business purpose," asserts Brian Wieser, a research analyst at Pivotal Research Group, who previously was the chief economist and forecaster at Interpublic's Magna Global unit. "Its purpose is locking down that which is most in demand, and that which is increasingly most in demand for a particular cohort."

The cohorts Wieser is referring to are really big and somewhat price-elastic national advertisers, especially those in competitive, time-sensitive marketing categories such as automotive and movies who care more about delivering

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prime-time advertising impressions when they need them, rather than saving a media buck or two.

Wieser notes that if you look specifically at the broadcast network upfront prime-time marketplace, “170 companies account for 90 percent of network TV advertising revenues.”

“That is a very concentrated cohort. That cohort accounts for 50 percent of all TV advertising,” he says. Marketers aside, he notes those 170 companies are represented by only about a dozen big ad agencies, whose jobs depend, to some extent, on the upfront.

Wieser’s point reminded me about an old adage I used to hear when I first started covering the upfront. It goes like this, “No media buyer ever lost his job for paying too much in the upfront, but they have for missing the upfront.”

“That’s the reason why it exists,” Wieser notes. “Whether the real number is 2 percent or 4 percent is besides the point.”

That may be true, says Jon Mandel, a long-time top Madison Avenue media buyer who is now CEO of Precision Demand, a company that is trying to bring a more scientific approach to buying television, but those reasons have grown outdated and irrelevant.


“If you go back historically, there were real marketing reasons for the upfront,” he says. “Originally, it was because the advertisers owned the shows and were part of the development process. Then it became about the timing of it.”

Most big marketers used to have fiscal years that ended on June 30, so the timing

of the upfront, which usually begins in June, made good sense. But nowadays, Mandel notes, most big advertisers have calendar fiscal years, so a late spring or summertime upfront makes no sense for them from a fiscal point of view.

“In theory, the timing of the upfront should have been moved to sometime around October,” he says. And while that might conflict with the launch of the new prime-time season in September, when kids are going back to school, Mandel notes that prime-time programming — and viewing — is now more of a year-round phenomenon.

Even marketing reasons, like the auto industry’s history of introducing new car models in September, are no longer the factor they used to be for the upfront. In the end, some believe the upfront continues to operate when and how it always has, because, well it’s when and how it has always operated.

“In the end, it is a lot of smoke and mirrors, because of all the glitz and Hollywood star power associated with it,” Mandel concedes, adding, “But it’s really just like putting lipstick on a pig.” 

NO MEDIA BUYER EVER LOST HIS JOB FOR PAYING TOO MUCH IN THE UPFRONT, BUT THEY HAVE FOR MISSING THE UPFRONT.



UPFRONT REWIND

**Meet the New Upfront Boss, Not the Same as the Old Upfront Boss**

For its 2004 upfront presentation, CBS executives warned media executives they shouldn’t leave the event too soon — a caution that was made a few times during the event at Carnegie Hall. Why? Most media executives can feel a tad jaded and sometimes let down by TV sellers’ attempts to wow them. But not this time. At the end of the event, CBS shocked more than a few with a rare appearance by longtime rock group The Who, who performed three songs. All this was during the period when *CSI: Crime Scene Investigation* was the number-one rated scripted broadcast network show. *CSI*’s musical theme is The Who’s song, “Who Are You?”

“That was a big surprise,” says Gary Carr, senior VP and executive director of national broadcast for TargetCast tcm. “For CBS, this usually staid network, it blew us away.”



PHOTOS: FROM TOP, SHUTTERSTOCK.COM; JEFFREY STARR, CBS

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# THE VIEW FROM THE STAGE

*Networks still parade their biggest talent during upfront presentations* BY DAVID GOETZL

# ANIMAL PLANET

## Angly Human



Shorty from *Pit Boss* is greeted by fanfare during Animal Planet's upfront in 2012.



**M**itch Oscar, a long-time agency executive, remembers Robin Williams taking the upfront stage to interest advertisers in a new series called *Mork & Mindy*. In full dress and playing his role as an alien, the comedian’s act included a prayer to the Nielsen gods.

“We all cracked up hysterically,” Oscar said.

Not all actors (or talent) sent out by networks to entice the buying community are able to bring the house down like a pre-movie star Williams. In fact, over the years, their appearances are arguably one of the main culprits why upfront presentations have lasted so many hours.

A standard has a network playing a clip of a coming new drama or comedy and then members of the cast coming out. A lead star basically says hello and thanks for your support. The rest just stand there.

Though there is always polite applause, after the routine happens for, say, the fifth time at a single presentation, some in the crowd might get a little antsy — assuming the actors aren’t well-known. In other words, not the *Friends* cast saying hello or a Kevin Bacon heralding a new TV role.

Advertisers may have gotten excited a few years back when the talent on NBC’s NFL coverage didn’t just appear, but tossed footballs into the crowd. There were only a few, though. Did advertisers wonder with all the money being spent, shouldn’t everyone get one in a goody bag?

In recent years, as reality TV has boomed, “regular folks” have been called on to entice advertisers — notably, during presentations by cable networks. Discovery Communications, which doesn’t use scripted programming, makes particular use of them annually at its showcase at New York’s Time Warner Center.

Last year marked the first time Shorty Rossi, the star of Animal Planet’s *Pit Boss*, appeared before advertisers in the presentation (he had attended and mingled with them at post-event gatherings before). Like other actors and reality stars, he said he didn’t know what an upfront was before a briefing prior to his first one.

Now, he gets it, though. The attendees control billions of ad dollars that can impact a career.

“You can have the best show in the world and if you don’t convince the [advertisers] that it’s going to last for a while or the ratings are [going to be] great, you aren’t going anywhere,” Shorty said. “You can have the worst show in the world and have huge ratings and the advertisers are going to see that ... they’re the ones



that pay the bills, they’re the ones that pay my salary even though it comes from the network.”

Shorty didn’t just come out and wave last year. A clip introducing new show “Finding

Bigfoot” ran and it seemed likely one of the stars would follow on stage. But, playing off the Bigfoot concept, Shorty emerged from a cloud of fog as the lights came up asking, “What did you expect, some-



Bretty Raymer and Wayde King from *Tanked* bring in cute reinforcements.

thing bigger?”

He was holding pit bull Hercules. Dogs frequently make appearances in Super Bowl ads, so why wouldn't they appeal to advertisers?

In that vein, Animal Planet

tried it again last year with *Tanked* stars Brett Raymer and Wayde King. Like other network talent, they were scheduled to play a role in the next *Puppy Bowl* and came out with puppies and waved their paws.

Raymer said he and King do fine in front of crowds, but there were some nerves before going on. “Being a big part of the whole presentation was really exciting and just a fun thing, but when you don't

know what's going to go on, there's ... a little bit of nervousness,” he said.

Fellow Discovery Communications star, Buddy Valastro — the Cake Boss who appears in an eponymous



Buddy from *Cake Boss* puts on a show for the buyers.



PHOTO COURTESY OF TLC

UPFRONT REWIND

### Pilots Draw Buyers

Media buyer Mitch Oscar recalls networks showing full pilots that made an impression, such

as NBC with *The Cosby Show* (buyers were impressed at a time when NBC was struggling), and *Hill Street Blues* (buyers were engrossed; when cops were gunned down in the last scene, “there was just an absolute hush,” and some ensuing concern whether that would be appropriate for prime-time TV).



## DISCOVERY AUTHORED ONE OF THE MORE EMOTIONAL UPFRONT MOMENTS IN 2009 WHEN CHESLEY SULLENBERGER, THE PILOT WHO LANDED THE US AIRWAYS PLANE SAFELY IN THE HUDSON RIVER, CAME OUT

show on TLC — said he wants to appeal to two audiences: advertisers and his bosses. “I do feel a little bit more pressure on me because not only do you have [advertisers], but then you have all the people

from Discovery and they’re great people ... but you are still a little nervous because you still want to perform,” he said.

He’s been on stage multiple times — Discovery has presentations in New York, Chicago and Los Angeles — and said he once forgot his lines and “definitely got a little stage fright,” but improvised to the point he didn’t think anyone in the crowd noticed.

Speaking of “regular people” — or ones that used to be — Discovery authored one of the more emotional upfront moments in 2009 when Chesley Sullenberger, the pilot who landed the US Airways plane safely in the Hudson River, came out. TLC was announcing it would air a documentary about him, and the crowd gave him a sustained standing ovation.

Besides actors, network executives from sales to



programming also appear on the upfront stage each year, and it's important they be prepared for anything. Memorably, one year Mike Tyson appeared to introduce an Animal Planet show he'd be starring in, rooted in his love of pigeons. As he got going excitedly, he spoke about how he used to skip school while collecting them.

Animal Planet chief Marjorie Kaplan might have been a bit surprised, but she didn't miss a beat after Tyson, seamlessly telling the advertisers, "We don't support truancy, but this is going to be quite a show."

Perhaps the best example of an executive acting extemporaneously with aplomb came in May 2011 at the Turner Broadcasting event. It was the upfront when the lights went out on Broadway (actually a few blocks away at the Hammerstein Ballroom). About 15 minutes into the show, an executive pointed the audience to a clip of a new comedy.

The screen was blank. And, it stayed that way for what must have seemed forever for the Turner bosses.

Upfront presentations are rehearsed, so when Steve Koonin, in charge of the networks presenting, realized some sort of power outage wasn't in the script, he ran up on stage and offered a hilarious intro: "My name's Steve Koonin, formerly of Turner Broadcasting."

He proceeded to tell a series of jokes that killed



time and just killed. At one point he said to advertisers, "Our pricing is not changing because of this."

Upfront event schedules have moved over the years. In 2010, seemingly looking to take advantage of the popularity of *Jersey Shore*, MTV held an event in February not long after the show wrapped its first season. The cast didn't take the stage, but was

**"WHEN I FIRST STARTED WITH THIS COMPANY 15 YEARS AGO ... THE NBC UPFRONTS WERE HELD AT PRESTIGIOUS AVERY FISHER HALL. REMEMBER THOSE DAYS. THEN, THEY MOVED TO HISTORIC RADIO CITY, A BEAUTIFUL MAJESTIC PALACE. NOW, WE'RE ALL STANDING IN A SOGGY TENT OUTSIDE THE NBC STORE. I HOPE YOU'LL JOIN US AGAIN AT NEXT YEAR'S UPFRONTS AT THE FALAFEL STAND ON 49TH STREET."**

CONAN O'BBIEN

**UPFRONT REWIND**

**Magnum Lures the Girls**

In the 1980s, Tom Selleck was a decade-long heartthrob in his role as *Magnum, P.I.* Buyer Mitch Oscar remembers the actor being very popular at a CBS upfront event: "Tom Selleck was there and all the girls lined up when he was Magnum."



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very popular when mingling with advertisers at an after-party.

Turner and ESPN have joined the broadcast upfront week, looking to persuade advertisers their value is on par with the Big Four.

In 2008, NBC sought to shake up the overall concept of a presentation, looking to emphasize NBC prime time along with other NBCUniversal assets. Instead of its typical Radio City grand show, it held an NBCU *Experience* — replete with the “Kitt” car, as a *Knight Rider* redux was on tap — in a tent at Rockefeller Center. There was also a party where Conan O’Brien did a bit, as he was readying to take over *The Tonight Show*.

The comedian riffed on NBC’s decision to try something new (or perhaps cheaper): “When I first started with this company 15 years ago ... the NBC upfronts were held at

prestigious Avery Fisher Hall. Remember those days. Then, they moved to historic Radio City, a beautiful majestic palace. Now, we’re all standing in a soggy tent outside the NBC store. I hope you’ll join us again at next year’s upfronts at the falafel stand on 49th Street.”

NBC traditionally had the prime lead-off position during upfront week on Monday afternoon when anticipation was high and advertisers weren’t tired of, well, largely unknown actors coming out and saying hi. In 2009, NBC held an evening comedy event after ABC’s Tuesday event and ceded its Monday spot.

Many would say that turned out to be major mistake. Fox pounced and has taken over the Monday spot. NBC has since returned with a Monday morning event, but no longer has the day to itself.

Needless to say, O’Brien is no

longer in the spotlight at NBC, having been canned at the network. Turner, where he now hosts a late-night show on TBS, has called on him quite a bit, though, for laughs at presentations. (O’Brien had finished a bit just before the electricity problem in 2011.) Perhaps, though, the most anticipated comedic performance of upfront week comes courtesy of Jimmy Kimmel, who annually pokes fun at the TV business at the ABC event, including his own network.

“He’s a highlight,” said Don Seaman, formerly of MPG and now at TVB. “Every single time I think he kills it.”

In 2011, Kimmel told advertisers: “I can’t promise you any of these shows will be good. I can’t promise you any of them will be successful. But what I can promise you is that they will be expensive to advertise in.”

And ... “Remember those

shows that we were so excited about last fall? We cancelled all of them. And yet here you are again. I think you might have a gambling problem.”

Does ABC censor him? Basically, no, Kimmel told Kim Masters last year in an interview on her public radio show in Los Angeles.

“They forgot to look at my script the first year,” he wagged (or maybe not). “Nobody was paying attention to me and I wound up making fun of them and kind of everything and it went well.”

He added: “Luckily, I was able to kind of set a precedent, and now I think people expect it from me. And, by next year they should be pretty well sick of me.”

Not a chance, says Seaman. “He owns that crowd ... maybe it’s just because he’s mocking us, which we seem to appreciate. That works really well.”

(One long-time agency executive said Kimmel’s funny, but it’s not in good taste to mock the hand that feeds you, so to speak.)

Speaking of ABC, Seaman said that the network played the full pilot of *Modern Family* as it was getting ready for launch at Lincoln Center and advertisers were very impressed. “The whole room just went: that’s a hit,” he said. “That was obvious. Perfect.”

The cast may have come out afterwards, but it sounds like the deal with advertisers was already sealed before Kimmel could poke fun at it. **M**

UPFRONT REWIND

### The Mary and Grant Show

Mitch Oscar, long-time media buyer, recalls Mary Tyler Moore spontaneously bringing a drink out to NBC chief and then-husband Grant Tinker while he was presenting in the 1980s. Tinker cracked that the service was unusual, since Moore in real life wasn’t as at-the-ready as her character on the *Dick Van Dyke Show*.



PHOTO: JEFFREY STABE, CBS



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**We hear about them more and more these days — those cord-cutters who have set sail from the expensive docks of traditional television and are waving from the shores of online video, happy, free, untethered, pockets heavy with saved money. The consumers who do opt to forgo the traditional TV model present a problem for content creators — namely, how to make money — or at least take some from television’s 70 billion-dollar-a-year ad revenue compared to digital’s 2 billion.**

So while the TV advertising buyers are coming together in April in big hotel conference rooms in New York for the annual upfronts, across town an emerging conference is coming together for a similar event focused on the online video space that its presenters hope will one day rival the upfronts: the NewFront.

Started in 2008 by digital agency Digitas and spearheaded by then-CEO Laura Lang, currently the outgoing CEO of Time, Inc., the NewFront sought to create a marketplace for the growing segment of digital content that hadn’t found a home with marketers and advertisers.

“It started when we realized there was a burgeoning market of digital content creators,” says Lang, “There was no way to put that group of people together with brands and marketers. We said, ‘Wait, there is not a natural marketplace for this growing segment.’ It was very clear that people were consuming digital material. We wanted to show people it’s a future marketplace for digital content creations. A creation of a marketplace [was the goal].”

The first year’s NewFront, known as the Digital Content NewFront, brought together prominent digital content creation companies like MySpaceTV, MTV and the now defunct 60 Frames. The panelists were heavy hitters in the media industry as well, with then-Disney chief Michael Eisner and 60 Frames CEO Brent Weinstein, among others. After that, the

panelist names got even bigger, drawing in people from myriad professions including Al Gore, Demi Moore and Subway CMO Tony Pace who all had one goal: monetizing their online video properties... at some point.

“The goal at the time was to increase awareness of ever growing content creation to help marketers and advertisers understand the role digital content could play. For Digitas, it was a chance to show leadership,” says Lang.

When Digitas opened the NewFront to other agencies in 2012, the event became an industry force with content flowing in from competitors like AOL, Microsoft, Hulu, Vevo, Yahoo and Google/YouTube.

This year, Digitas will completely turn



# Negotiating a New Frontier

*Online video’s expansion has created the need for its own marketplace much like TV* **BY CARRIE CUMMINGS**

# NEWFRONT 2012



The NewFront's founding partners at the 2012 presentation

over the NewFront to the Interactive Advertising Bureau and host its own presentation during the event. "All six of the founding partners — Digitas plus the five founding publishers — recognized that the enthusiasm of agencies and marketers would grow if the NewFront was fully understood to be a marketplace run by sellers for buyers: *all* buyers," says Randall Rothenberg, President & CEO of the IAB.

"So IAB's stewardship is simply an affirmation of neutrality in support of a vital and explosively growing marketplace."

### *The Creators*

Shira Lazar, cofounder and host of *What's Trending*, a daily YouTube program, has been part of the NewFront since its inception: she hosted one of the first

NewFronts and Digitas' presentation again in 2011.

For online content creators like Lazar, the NewFronts are an opportunity to showcase their work and start a conversation with agencies about the online audience.

"An entire generation of people are getting content online," says Damon Berger, CEO and cofounder of What's



Trending, “The subscription model, over the top — there is an entire generation who just watch online and it’s something advertisers are understanding more and more. At *What’s Trending*, forty percent of viewers access over mobile devices.”

With creators engaging their audiences, better and more finely tuned content can be produced based on consumer taste and preferences.

“The creators today have built communications and brands through two-way conversations with audiences,” says Lazar, “It changes how we produce content for this generation. It changes how we create and broadcast content. We can be more creative.”

This is good news for advertisers. Online content creators will even say it’s better than the TV ad model.

“Community allows advertisers to engage in a conversation that a one-way

TV broadcast can’t handle,” says Berger, “Traditional TV is still linear and has no interaction even with Twitter and Facebook engagement.”

### *Are the buyers buying it?*

Everyone wants to know just how much, if at all, the NewFront will affect its perceived counterpart.

“The upfronts are much more rooted in the negotiation aspects — driven by the scarcity of TV inventory and the competition for it,” says Jessica Sanfilippo, Group Media Director, 360i. “The rules are clearly defined and the opportunities in the form of spots are straightforward. With the NewFronts, we as buyers are still being sold conceptually by the digital publishers on the value — and, if you factor in all video channels including UGC, the inventory is fairly limitless. So the NewFront

conversation shifted to more of the uniqueness of the integration opportunities, such as branded video entertainment. In that sense, the flexibility of execution opportunities afforded by the NewFronts translates into some strong branding opportunities.”

To that point, it may not be fair to compare the NewFront to the upfront in the future.

Lang agrees: “It’s not clear that the NewFront will mimic the upfronts. I do believe they will take money out of the markets.”

But the general consensus in the media community is that no money has been shifted from TV to online video ad budgets, though no one is certain.

“I’ve heard there are ranges from a half billion dollars moved from the upfronts to the NewFront,” says Lang.

“We have seen our clients adopt online



Clockwise, from left: Tom Green hosts his online talk show from the 2009 NewFront; Laura Lang at the 2010 NewFront; emcees Nicole Dabeau and Shira Lazar at the 2011 NewFront; Heidi Klum at the 2012 NewFront; Arianna Huffington and Martha Stewart at the 2010 NewFront.

video, not as a replacement to TV, but as a complement and supplement,” says Sanfilippo, “Clients understand the opportunity that online video offers in order to tell richer, more interactive stories with the consumer that go beyond the 30- or 60-second spot.”

With the IAB taking over the NewFront in 2013, the event is taking shape as something not quite entirely different from its Digitas days, but still evolving in scope and sophistication. “We look at IAB merely as the maitre d’ at the hottest restaurant in town — the burgeoning upfront marketplace for original digital video programming, distributed at mass scale, but infinitely segmentable and intimately targetable,” says Rothenberg. “Our goal is to help the producers of the most exciting digital content establish a robust market where agency buyers and brand marketers want to shop.”

And as the NewFront evolves, “there will

be a new wave of new stars and celebrities from the digital world in the coming years,” says Lazar.

But not so fast. While buyers may pack into every seat at the presentations and eat all the shrimp at the after parties, don’t expect money to flow as freely as it does at the upfronts.

“There is urgency behind the upfronts, whereas the NewFronts involve more time for clients to source on budgeting as they shape their investment opportunities,” says Sanfilippo.

Still, Lang is

optimistic: “The real deals are always done behind closed doors and that will always be the case. It will happen at the NewFront.”

#### UPFRONT REWIND

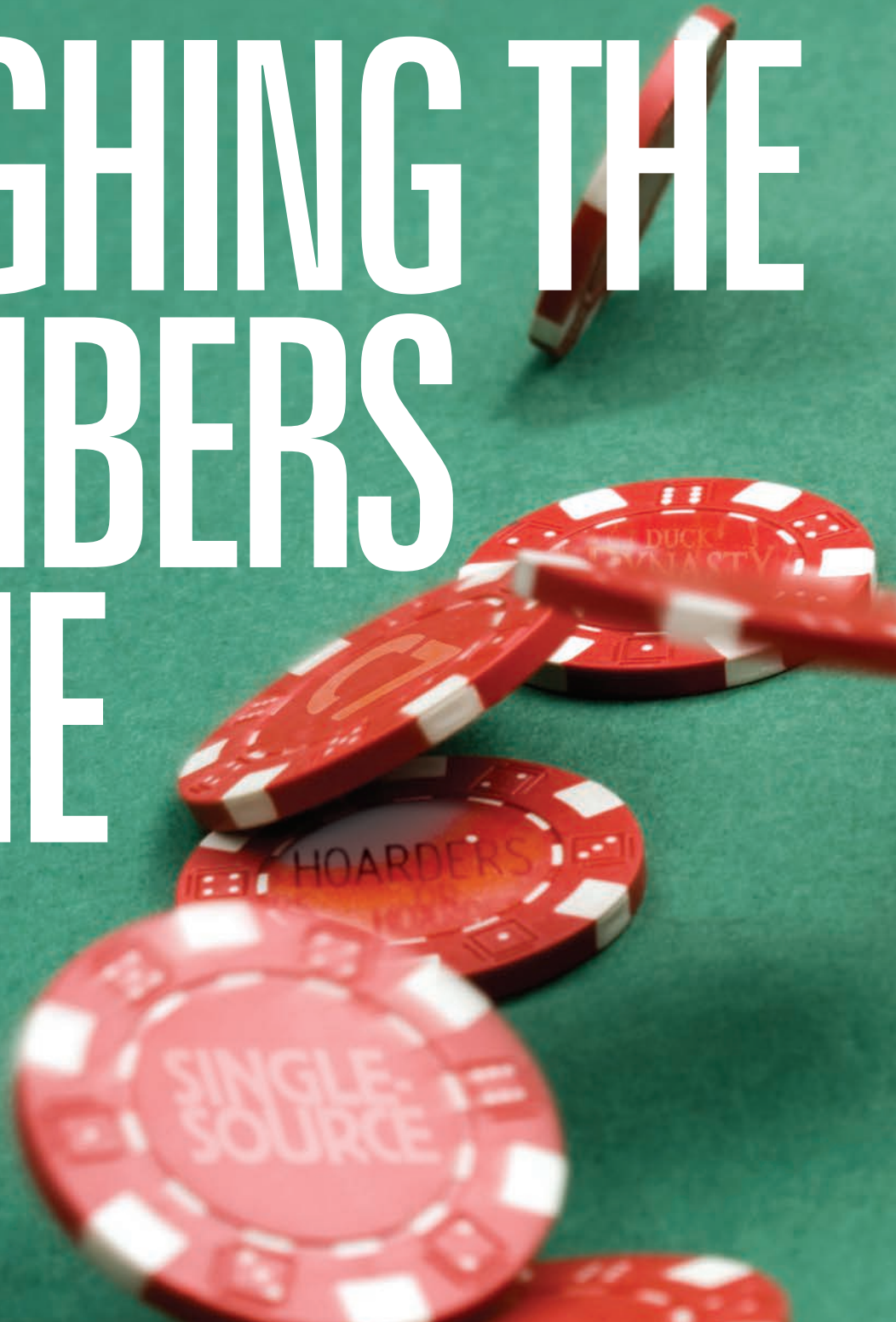
### Kiefer: 24-Hour Prince

Steve Grubbs recalls that Kiefer Sutherland, who has had some troubles with the law, was a prince on stage at Fox upfront presentations with his show *24*. “He was very gracious with the audience and very appreciative to Fox, so I was always very impressed with him,” Grubbs said, adding he picked the show to be a hit before it launched.



METRICS

# WEIGHING THE NUMBERS GAME



*With the abundance of metrics available, buyers and sellers muddle through the numbers to cut the best deals* **BY DOUGLAS QUENQUA**



**F**or media agencies, preparing for the upfronts used to be fairly straightforward: Watch the new shows, study the ratings for the old ones, review some demographics and place your bets. Win some, lose some, wash, rinse, repeat.

Flash forward to 2013, when buyers have the option of arming themselves with a mountain of data that makes Nielsen ratings look like the score of a ping-pong match. There's C3, C7, set-top, single-source, social media, commercial ratings — the list goes on and on. And don't forget the expansion of a three-network field into a veritable free-for-all of cable networks and digital platforms. So while there might be a ton more data, there's also a whole lot more to measure, because who the heck knows what anyone is watching anymore?

"What has become abundantly clear in the past few years with all the different media devices available and vying for people's attention is that what we really need to focus on is just attention," says Brian Hughes, SVP and head of the audience analysis practice at MagnaGlobal. "People are bombarded with ads all day from all kinds of places, so we really want to focus on the times and the content in which we feel they're most attentive." For Hughes, doing so requires a carefully balanced mix of proprietary, social and vendor data.

It's hard to say exactly when this modern era began. Perhaps in 2007, when the networks started basing their rates on the ratings of commercials rather than the shows they buffeted. But some would go back further, to 2002. Or more specifically, September 15, 2002, when a pay-cable show turned heads by siphoning off a serious chunk of America's eyeballs.

That was the day HBO aired the first episode of *The Sopranos'* blockbuster fourth season. The show pulled nearly 14 million viewers, then an all-time high for the show (and a remarkable feat given the mere 30 million U.S. homes that subscribed to HBO).

Billie Gold, VP and director of programming research at Carat, remembers scratching her head over the exodus of viewers. "We were all kind of wondering what happened," she says. "It was one of the first times, besides when sports air on ESPN, that we saw some network shows take a hit during the hour that *The Sopranos* was on."

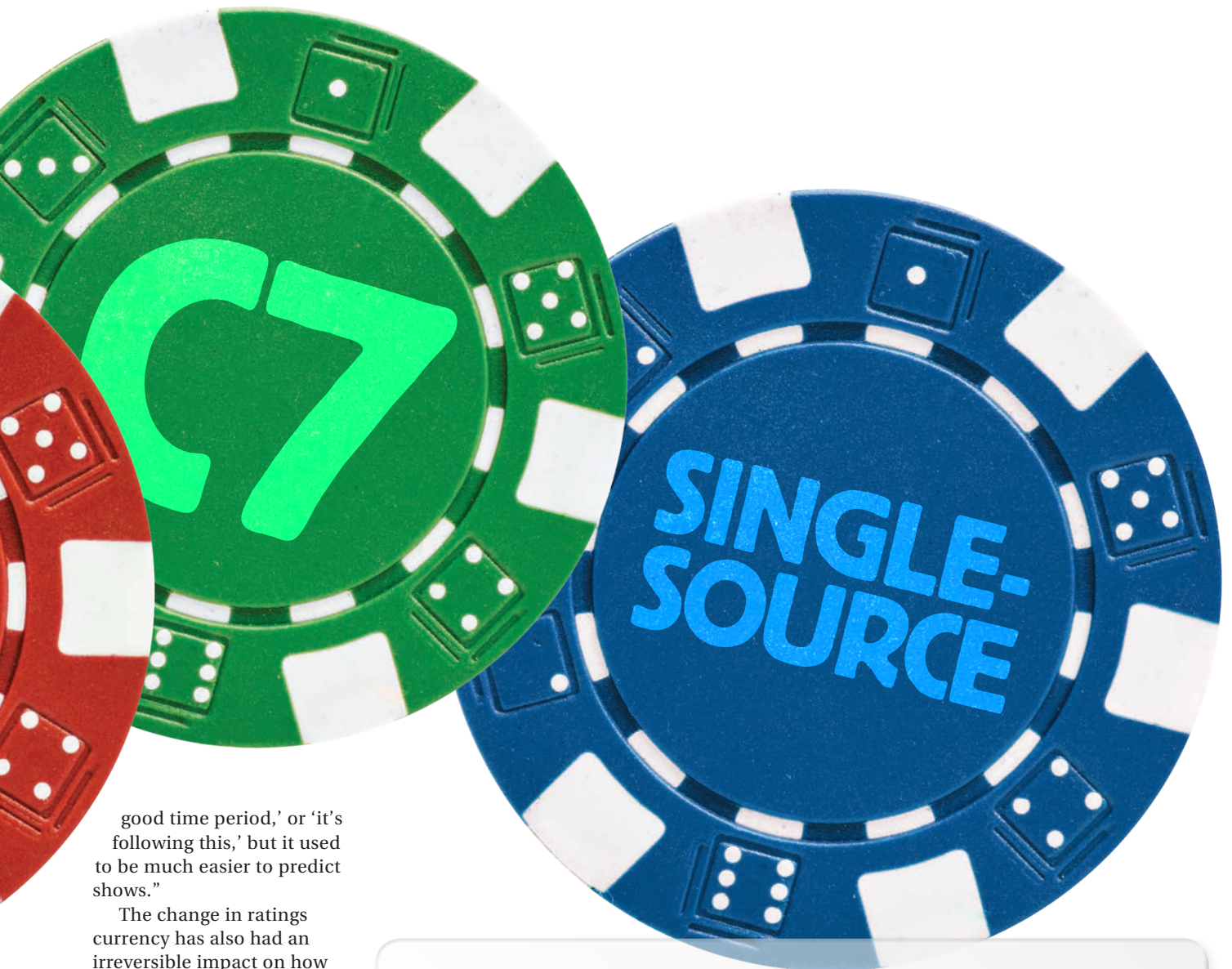
"Now we see the same thing happening when AMC's *Walking Dead* is on," she adds.



Today, Gold says the rise of original programming on cable is the main factor shaping how she prepares for the upfront. With basic cable networks producing some of the most popular and critically acclaimed shows on television, determining which broadcast shows will pull an audience is harder than ever — particularly because the broadcast networks are pulling so few viewers overall. Instead of factoring in two or three other networks, buyers must now scan the entire television landscape in search of other attractions, even those as seemingly inconsequential as *Pawn Stars*

or *Hoarders*. (As if to drive home the point, the debut of *The Bible* on the History Channel drew a shocking 13.1 million viewers in March, just days after A&E pulled nearly 9 million viewers with the third-season premiere of its reality series *Duck Dynasty*.)

"The basic process has remained the same," says Gold. "But we have to spend more time and energy figuring out what shows are going to do because we keep seeing them reach all-time lows. We keep saying 'Oh it's in a



good time period,' or 'it's following this,' but it used to be much easier to predict shows."

The change in ratings currency has also had an irreversible impact on how buyers do their research. Long gone are the days of share estimates, when agencies would approximate what percentage of active televisions were tuned to a given show — a relic of the days when commercial prices were tied to their host programs.

"We don't do them anymore because the shares and the HUTs [Households Using Television] were all wrong," says Lyle Schwartz, a managing partner at GroupM. "Today, we actually estimate the audience, not the share. The old metrics don't seem to work in the calculations these days."

#### UPFRONT REWIND

### Upfront's Rite of Passage

Steve Grubbs, who spent 22 years at BBDO and rose to top-level positions at Omnicom, said CBS didn't always hold its upfront presentation at Carnegie Hall. Before moving to the famed venue, the Tiffany Network would invite an exclusive list of buyers to its West 57th Street studio for a full-day of pilot watching, followed by a cocktail reception. "You knew if you were invited to the CBS upfront presentation, that sort of signaled your rite of passage as a senior member of the business," Grubbs said. He remembers his first CBS gathering included an appearance by Alan Alda as *M\*A\*S\*H* was winding down.



PHOTO: SHUTTERSTOCK.COM



The reigning currency these days may be the C3 (see sidebar), but that doesn't limit the buyers from consulting other sources. What used to be a one-company business — Nielsen told you who watched what; otherwise you relied on hunches and gut — is now a multi-vendor universe eagerly providing buyers with every form of data. It's information that may not make its way directly into a negotiation, but it can help buyers decide whether or not a program's worth buying.

Not that all buyers choose to use them. "Not at all," says Gold, when asked about including set-top-box data in her research. "Basically set-top-box data is just looked at in terms of trending and not in terms of ratings," she says. "We match it up with Polk data and it marries with Simmons data, so the planners might use it directionally. But it in no way affects how we use it in terms of doing projections at all."

As for single-source data, much-ballyhooed measurements that tie TV exposure to product purchases at the household level, the technology isn't yet reliable enough to be compelling, says Hughes.

"There really isn't a definitive single-source product available yet," he said.

Still, MagnaGlobal long ago sensed the need to complement the usual Nielsen data, and developed a pro-

prietary measurement called the Magna Value Index that seeks to capture audience attention. Exactly how it does this Hughes won't say. "Some of the indicators we might use are how long they're tuned in before they tune away or do something else," he says, "or at what rate are they recording and playing back the program." To supplement that metric, Hughes relies on social media activity connected with a given show. "We feel that people's interest in watching a show and commenting on it in real-time also belies a level of attentiveness."

Not everyone buys that theory, however. Critics question whether somebody tweeting about a show is necessarily paying attention to the commercials. But Hughes claims that his com-

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pany has cracked the social/TV code.

"We've done a lot of really in-depth research on social activity that happens simultaneously with

TV viewing," he says. "Like when we're looking at a big live event like the Oscars, we're really looking at down to the minute how much activity is happening. Is it happening during commercial breaks? Are people commenting on what's just happened or on something that's happening in real time?" By studying the difference, MagnaGlobal believes it can tell just how engaged viewers are with a program.

Even with all the whizz-bang ratings available today, some buyers still rely on old-school metrics that have little to do with television. Schwartz says GroupM buyers "look at online viewing information from things like Nielsen as well as ComScore" and SNL Kagan, which provides wireless metrics. "But we

**UPFRONT REWIND**

**Les Moonves' Starring Role**

For several years, CBS would play a spoof video with chief Leslie Moonves often offering a sort of "cutting jab at his competitors," Steve Grubbs recalled. In 2004, Moonves griped to Dr. Phil playing a barkeeper about how tough a year it had been. Dr. Phil tried to cheer him up. Soon, Moonves was in a cab driven by Tony Danza headed to Carnegie Hall, taking a shot at *The Apprentice* star Donald Trump on the way. Moonves once joked that more people had seen him in the upfront videos than during his entire time as a working actor.



PHOTOS: SHUTTERSTOCK.COM

## C7? DEBATE OVER CURRENCY CONTINUES

These days, no upfront would be complete without a debate over currency. For the majority of networks, C3—live viewing plus three days of time-shifted playback—is the current standard. But there has long been speculation that the networks will eventually succeed in pushing that to C7, which can increase the ratings for some broadcast networks by as much as 4 percent. Indeed, ABC says it has already begun cutting C7 deals and intends to continue doing so.

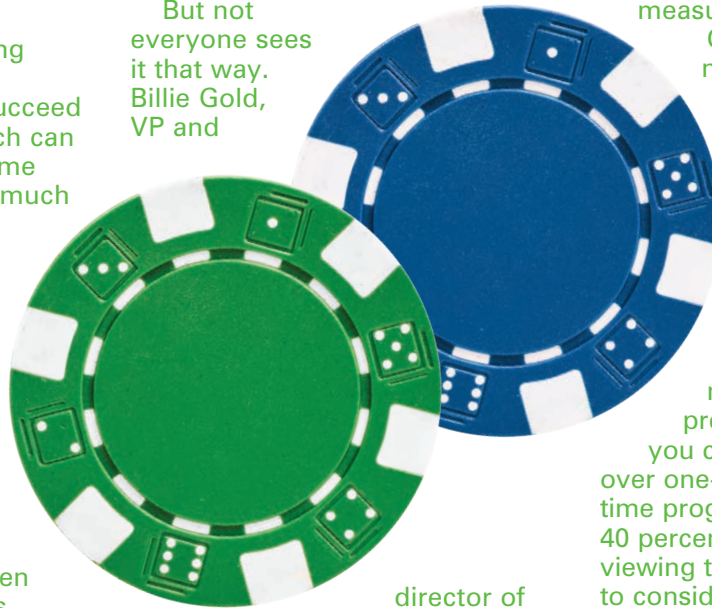
Conventional wisdom says the shift to C7 won't be happening this year. But that doesn't mean they won't be a factor. What buyers must decide is whether they will consider the C7 ratings when making their own decisions about where to invest.

Lyle Schwartz, managing partner at GroupM, says he prepares for the upfronts by arming himself with both the C3 and the C7 ratings for shows his clients might be interested in.

"We're looking at the validity of some of the information there because, should the opportunity arise that we would look at it, I'd have to understand what the impact on costing would be," he says. "For instance, if you get a program that has 4 percent more viewing to C7, then to equate the two I'd actually have to lower

the CPM on a C7 versus a C3, because all that's changing is the way that we measure it. The value to the advertiser doesn't really change."

But not everyone sees it that way. Billie Gold, VP and



director of programming research at Carat,

says C7 ratings are "not a factor" at this point.

"The networks are going to try and push for that," she says, "but the truth is, as an agency, we can't do two sets of estimates."

She also cites the most common argument against moving to C7, which is that for many clients, it makes no sense to pay for viewers who see time-sensitive ads a week after they air. "We have movie clients, we have retail clients,

and we have auto clients that have dealerships that are trying to drive people into their stores and theaters," she says. "They do not want C7 measurements."

Of course, on the network side, things can look quite different. "The conversion of the sales metric to C3 a few years ago was an important first step," Ted Harbert, chairman of NBC Broadcasting, told the audience at his network's 2012 upfront presentation. "But when you consider the fact that over one-third of all prime-time programs have at least 40 percent of their weekly viewing time-shifted, it's time to consider moving to a C7 metric."

But even CBS President Les Moonves said at a December 2012 media business conference, that C7 was unlikely to inform many deals this year: "I think we'll have C7 in a year and a half."

No doubt most buyers would rather see it take longer than that, and many believe it will never happen at all. Still, that doesn't mean you shouldn't study it, says Schwartz.

"You can negotiate on anything," he says.



LONG GONE ARE THE DAYS OF SHARE ESTIMATES, WHEN AGENCIES WOULD APPROXIMATE WHAT PERCENTAGE OF ACTIVE TELEVISIONS WERE TUNED TO A GIVEN SHOW — A RELIC OF THE DAYS WHEN COMMERCIAL PRICES WERE TIED TO THEIR HOST PROGRAMS.

also take a look at financials like the profitability of companies,” he says. “We look at the GDP, we look at costs of production such as gasoline prices, interest rates, unemployment.” Like any marketplace, TV advertising is based on supply and demand, so Schwartz says it’s important to know whether the ad budgets of

certain industries might rise or fall in the coming year.

Unlike the buyers of decades ago, media agencies today can hardly complain about not having enough data. Instead, the problem seems to be an overabundance of available metrics and insights, not all of which have yet proven their value. So like the advertisers who

find themselves drowning in big data, unsure what to respond to and what to file away, media buyers today may find their biggest problem is simply separating the wheat from the chaff.

“We’re of the mind that’s not about the number of sources you have,” says Hughes. “It’s about having the right sources.” <sup>M</sup>

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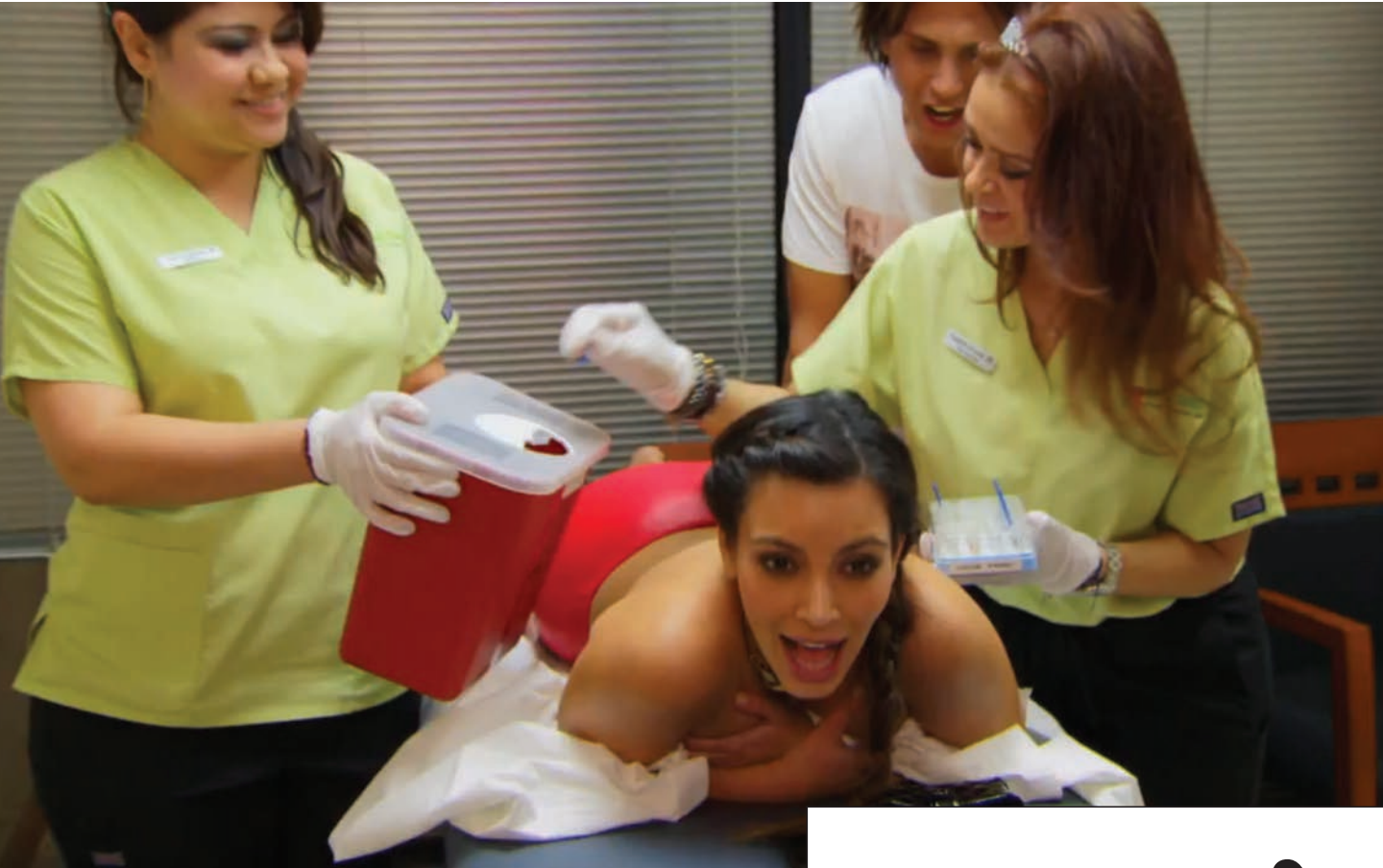
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# Let's



*Duck Dynasty's Willie Robertson; Kim Kardashian gets an allergy test (above); the cast from Teen Mom 2 and Jersey Shore (top right)*



# Go Numb

*More reality TV, especially on cable, is coming in the upfrunts.*

BY BARRY FRIEDMAN

On the road to hell (or, at least, its kitchen) will be an enormous street party filled with drunk, zaftig, tattooed 20-somethings from Jersey; sister-wives from Vegas, and mobsters, hillbillies, wannabe models, dancing stars, pawn shoppers, angry Amish, voyeurs, psychics, piss-poor celebrity shrinks,

Beverly Hills wives in limos, pregnant teens ... and scared ducks.

And EPT ads.

And attorneys wanting to make a buck off your defective bladder sling. There will be reality; there will be verisimilitude. There will be no good way to tell the difference. When you're liv-

ing out loud, there *is* no difference. It will be "Desolation Row" as if Randy Newman wrote the song.

TV reality producer Mark Burnett told *Esquire* he hates the term "reality television" and prefers "non-fiction programming." (That sound you just heard was a producer from PBS' *Frontline*



I'm not a real  
Boo Boo anymore,  
*but*

doing a half-gainer off the Edmund Pettus Bridge and splashing down in the Alabama River.)

Not that Burnett's wrong; these shows — even the best of them, like CBS' *Amazing Race* and *Big Brother* — aren't reality. But to say they're "non-fiction programming" is to say Domino's makes good pizza.

In the AAA ball of cable television, they are awkwardly choreographed worlds of manufactured tension, interspersed with soundtracks and cityscapes. Move the camera to the left or right and you'll see a craft service table in the foyer — not that there's anything wrong with that. I want my life filled with Mark Knopfler guitar riffs, the New York skyline, and a Coleman packed with Diet Snapple.

Brad Adgate, senior vice president and corporate research director of Horizon Media, says, "It's important to

be reminded that reality shows are on television because they are thought to be entertaining. The people who are on it are selected for various reasons: looks, personality, not [being] too intelligent."

And we're off ...

Urban elites get vertigo at the sight of blindfolded children guessing which family member's breath is hitting them in the face, as was done on TLC's *Here Comes Honey Boo Boo*, while Southerners harrumph at those who belittle them for dipping tater tots in the ranch dressing. Of course, if you make a gazillion dollars selling A&E's *Duck Dynasty* Commander Copperheads for \$179.95, you probably don't care what anyone says about you or what you put in the Hidden Valley.

Mocking reality television is as easy as taking on BP, but it's not like the shows are an amorphous blob of pathos and ungrammatical syntax; they resem-

ble more a buffet of vicarious fandom.

Fox's *American Idol*, CBS' *Survivor*, NBC's *The Voice*, Fox's *The X-Factor* — we admire them. Bravo's *Real Housewives of Beverly Hills* and *Orange County* — we're amused by them. (What the hell's going on in Atlanta and Miami, though?) History's *Pawn Stars* and A&E's *Storage Wars* — we'd hang with them. VH1's *Mob Wives* and Fox's *The Swan* — we pity them. National Geographic Channel's *American Gypsies* and A&E's *Hoarders* — we fear them.

Dennis Miller, in the last funny thing he ever said, commented that we now have celebrities who can't even fill their 15 minutes of fame. He was being generous.

During the last half hour of an episode of E!'s *Kourtney & Khloe Take Miami*, for example, no scene lasted more than a minute, until the last one. The next-to-last four were :28, :46, :48,

# I play one on TV

and :54, respectively. Kim finds out she's allergic to her cat; Khloe deals with her addiction to coffee; Kourtney slaps Jonathan; he forgives her in milliseconds after swearing he wouldn't.

Thank you, good night. Tip your advertisers.

When the action resumes, the previous half of Kim's scene being convinced she was allergic is repeated; then, she faces the camera and talks about giving up the cat; then, she actually gives up the cat.

And here's to you, Ms. Kardashian, a nation turns its lonely prurience to you.

Anthropologists can't observe the tribes in Papua New Guinea collecting wild plants and eating sus papuensis (ocean pig) without affecting behavior, so how can Kimora and Johnny More not be self-conscious when a camera crew films their lunch at Fogo de Chao Churrascaria in *House of Fab*?

The mother ship at the moment of reality shows is the aforementioned come-smell-my-breath TLC's *Here Comes Honey Boo Boo*, a show about, well, God knows what it's about — either a poor Georgia family holding itself together, or the need for more Family and Child Welfare Services in central Georgia. It was reported the family is earning between \$15,000 to \$20,000 per episode.

Lily Tomlin once said, "No matter how cynical you are, it's never enough to keep up," but Alana Thompson, that's Boo Boo, is now worth \$500,000. She's no longer a chubby little poor girl from McIntyre, Georgia; she's got a line of clothing at the TLC Store. I'm not a real Boo Boo anymore, but I play one on TV.

But it's escapism, right, so what's the problem? Well, as Joan Didion wrote, "What if you ran away to find yourself and discovered nobody home?"

"Grandma, you were on TLC's *Miami Ink*?" These shows don't kill culture; they numb it.

Carrie Underwood, brilliant singer, but an idol? Tony Romo dumped her! And let's not put too fine a point on this: MTV's *Teen Mom 2* is the saddest show on television.

The reality landscape is turning inward, a world within a world — like one of those Russian Dolls that keeps revealing another doll. In an episode of *Boo Boo*, Mama June is bragging about all the stars who are now quoting Boo Boo — but can only come up with two: Kim Kardashian and RuPaul — reality stars.

For the love of David Sarnoff, make it stop!

Not a chance.

While scripted television purists may

be ready to throw the channel changer through their Vizio's if one more "real" housewife appears, advertisers are more than happy to follow viewers and the franchise to Boise and Tulsa.

I ask Horizon's Adgate about content: "It's like filming 12 hours of ESPN *Bassmasters* and waiting for the big one to come in."

The big one rarely does — and even when it does, it's anticlimactic. We knew Kelsey Grammer left Camille before she did — well, before Camille did. We knew Kris Humphries was a douche-bag before Kim did.

It's reality, but not in real time. This too: The fish don't know they're on television.

Then again, Gary Busey might not either. **M**

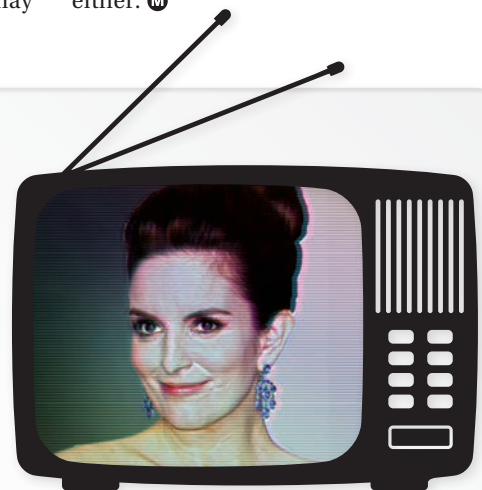
## UPFRONT REWIND

### Bearing Media Plans and Upfront Children

Senior media TV executives are seemingly always incorporated into TV network presentations. Many a media executive has been slimed or played the fool when it comes to a TV network's big staged upfront programming effort — all for the sake of entertainment.

So NBC was holding one of its many upfront presentations at Radio City Music Hall a few years ago, and out came *30 Rock*'s very pregnant Tina Fey, who said right after being introduced: "Nine months ago I met Bill Cella."

Cella, former senior Magna



Global executive, now a partner in the executive search company, The Cheyenne Group, said: "I was sitting right next to Randy Falco (former NBC chief executive) and Keith Turner (former president of advertising sales for NBC), who were laughing. I was totally set up."



HUMOR

# BANDE À PART

*An outsider's view of the upfronts*

BY LARRY DOBROW

**The last upfront presentation I attended was a Nickelodeon breakfast-palooza three or four years ago.** I went with my wife, who had a valid professional reason to be there. Mine was of a more earthly nature: I was in the neighborhood and had a hard-core hankerin' for hotel-buffet-caliber eggs. Also, the featured entertainer was one of the network's litany of triple-threat starlets (acting/singing/reputation management). When *iCarly* — or *Zoey 101* or *True Jackson, VP*, or whoever it was — comes a-knocking, you answer that door, friend. You answer that door.

So you can imagine my excitement as I backed the football-girthed omelet onto my plate. Media! Food! Song! It was like a Renaissance Fair, but with fewer Drench-a-Wench booths and more impenetrable market research. Surely I would be delighted into allotting the totality of my nonexistent ad budget towards a brand-redefining presence during the breaks of *The Naked Brothers Band*.

And then cataclysmically disastrous tragedy struck:



Boy band Big Time Rush performs at the 2012 Nickelodeon Upfront



**MY LASTING TAKEAWAY FROM THE MORNING WAS THIS:  
THERE IS PRECISELY NO REASON FOR  
UPFRONT EVENTS OF THIS SORT TO EXIST.**

an exec approached the mic, cleared his throat substitute-teacher-style and announced that the featured entertainer had called in sick, or at least slightly hoarse. You could almost hear all the media buyers in attendance start yanking their ads from *Team Umizoomi*. It seemed possible — nay, probable — that Nickelodeon would lose its low-digit slot on every major cable provider’s basic tier before brunchtime rolled around. Natasha

Bedingfield gamely filled in as entertainment, singing her “Pocketful of Sunshine” as if the room hadn’t just been smacked by a comparable weather-event metaphor, but the damage was done.

Or not. Mostly the upfront-saturated media drones shrugged and bantered pleasantly with one another. Some checked their BlackBerrys. The second the Nick presentation ended, they rose from their seats absently and plodded en masse to the next network

confab, one of three can’t-miss klatches scheduled for that very day. They didn’t seem bored or disgusted or sad. They were just going through the motions, not unlike the average factory grunt.

Unsurprisingly, then, my lasting takeaway from the morning was this: There is precisely no reason for upfront events of this sort to exist.

Maybe there was 15 years ago, when there were only a handful of the darn things and media buyers had to joust for coveted

*Nash Bridges* ad inventory. But today, when every broadcast or cable network move that matters is leaked and/or telegraphed weeks in advance of the upfronts? When there are close to 100 such shindigs on the slate, once you factor out-of-home, radio and other entities into the mix? And when there are about as many cable networks as there are days of the year?

Who has the time? Who has the will? The average buyer’s resources would be better spent reading the online TV trades, making a



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# SHOW STARTER

*Once merely an introduction to the next season's schedules, the upfront has come a long way.*

BY ED MARTIN

**When it comes to announcing their annual fall schedules,** do the big broadcast networks really need to continue producing massive presentations and throwing gigantic parties during what has long been known as upfront week? Or have digital media and social networking eliminated the need for such old-school largesse?

On the one hand, if the primary purpose of an upfront week presentation is to inform advertisers and the press of a network's plans for the upcoming television season, it would seem that such events have in recent years become largely unnecessary. Interested parties now have all of that information at hand

PHOTO: LEFF STAAK/CBS



NBCUniversal News Group  
upfront hosted by  
Joe Scarborough  
and Mika Brzezinski

at least a day before the events, and sometimes earlier. Those individuals include television viewers and fans that used to be the last to know about the networks' fall offerings but are now as well informed as anyone working in or around television, especially when it comes to announcements about forthcoming programs and schedules. That's because the networks release that information to the press before the events, and it is instantly transmitted to the public at large. Additionally, reporters at certain media and entertainment Web sites begin posting this information days or weeks in advance, as deals for new and returning shows are closed on the studio level and arrangements are made for talent from those projects to travel to New York for upfront week.

Some networks augment this early information discharge by posting clips from new shows on their Web sites in advance of their presentations. These are often the very same clips that are shown to advertisers on giant high-definition screens at Radio City Music Hall, Carnegie Hall or another outside New York City venue. As a result, many of the attendees at these events already know most of what they are about to hear and have already seen much of

what they are going to be shown.

This is a dramatic shift from the upfront week experience of old — old being defined as *pre-digital*. As recently as the '90s, most people walked into upfront events with only a general idea of what would be announced. Newspapers and daily trade publications would publish best-guess schedules based on information from the previous day, but they were rarely accurate. The atmosphere inside those venues was electric, especially if the presentation was well-produced and the clips from new shows caught on with the audience. In fact, the only way a presentation could truly fail was if it ran too long.

Today, the networks make a concerted effort to keep their presentations fast-moving, and most of them run between one and two hours in length. But in the old days, before the audience

was digitally empowered and ready to tweet snarky comments about an overly long production, these events could drag on for hours. Occasionally, a network would make the mistake of including an entire pilot of what it considered to be its most promising new comedy or drama, extending its presentation by up to 45 minutes and rarely generating good will in the process. Just ask anyone who was forced to sit through the pilot for the long-forgotten newsroom drama

#### UPFRONT REWIND

### Shedding a Little Light on the NBC Upfront

Just after General Electric bought NBC in the late '80s, NBC Entertainment executive Brandon Tartikoff walked on stage and said: "I'd like to show you GE's contribution to the upfront." Tartikoff then went to the formal podium, Horizon's Adgate recalls, and turned on the light.





## CAN THE BROADCAST NETWORKS HALT THEIR EROSION NEXT SEASON?

The 2012-13 broadcast season failed to deliver any new hits and saw declines among such formidable foundation series as Fox's *American Idol* and ABC's *Dancing with the Stars*. What's more, many powerful basic cable series, including FX's *Sons of Anarchy*, AMC's *The Walking Dead* and History's *Vikings*, outperformed a shocking number of broadcast programs in key demographics, while also dominating media buzz and social network status. The broadcasters had a few solid successes — notably The CW's *Arrow*, Fox's *The Following*, NBC's *Revolution* and CBS' *Elementary*. But as they begin to put together their 2013-14 season schedules, the pressure to maintain their status as the biggest and best in the business is greater than ever before.

CBS is in the strongest position, armed with the seemingly indefatigable comedy *The Big Bang Theory* and the unstoppable *NCIS* and *NCIS: LA*. It also has the most highly acclaimed drama on broadcast television in *The Good Wife* and such sturdy young series as *Blue Bloods*, *Hawaii 5-0* and *Person of Interest*. No broadcast network in recent years has proven more adept at maintaining its core strength while nurturing new shows — even if there is a sometimes stifling sameness in its reliance on procedural crime dramas of various stripes. All things considered, only a fool would suggest that CBS do anything different.

ABC, on the other hand, has seen better days. The network had heat during the 2011-12 season with the arrival of two breakout successes, *Once Upon a Time* and *Revenge*, but they both cooled way down during 2012-13. *Nashville*, the network's best hope for a freshman hit, still hasn't delivered on the promise of its pilot. ABC has the two best family sitcoms on television in *Modern Family* and *The Middle*, and the aging drama *Grey's Anatomy* remains potent, but the only fresh buzz-builder on the network is the surprisingly

strong sophomore *Scandal*. Nobody does distinctive dramas and contemporary comedies better than ABC, at least when the network is firing on all cylinders. It needs to play to those strengths.

And then there's NBC, which exceeded all expectations during the first half of the season by becoming the No. 1 network among adults 18-49, only to slide to fifth place (behind even Univision) once *The Voice* and new hit *Revolution* went on extended mid-season hiatuses. Plainly, the spring season of *The Voice* has to start a lot earlier next season, and *Revolution* needs to start a bit later in the fall and then continue uninterrupted through the following May. Meantime, the network's most pressing need is new comedies that target a broad viewership rather than niche audiences.

Fox is in more trouble than it cares to admit because of the substantive ratings erosion that continues to bring down the once mighty *American Idol*. Where would the network be without it? Fox would be advised to find a way to make its other big talent show work, but nothing about the first two seasons of *The X Factor* indicated that there is a strong show inside it. Advertisers and viewers haven't shied away from the adults-only horror-drama *The Following*, which continually pushes the envelope for broadcast standards, so Fox ought to be seeing what else it can get away with as far as scripted dramatic content is concerned.

The CW actually delivered one of the season's few unarguable successes in the dark superhero drama *Arrow*, and *The Vampire Diaries* and *Supernatural* are still going strong, so the natural inclination is for the network to focus on more fantasy fare. *Gossip Girl* and *90210* fizzled out this season, and the promising *The Carrie Diaries* has had trouble finding an audience, but that doesn't mean the network should abandon serials about pretty young people. It just has to make better ones. **EM**

WIOU at CBS' presentation back in 1990.

Of course, even the longest broadcast upfront presentations were somewhat easier to take than they are today, because they weren't crushed together in the space of four days along with those of so many cable and Spanish-language networks, and they didn't come at the end of three months of cable upfront presentations and parties. Indeed, back when there were only three upfront presentations, for CBS, NBC and ABC, and even when Fox was added to the mix, they weren't necessarily even

scheduled in the same week. There was plenty of breathing room between them. Today, those four overloaded days have for many become a punishing marathon, more an endurance test than an informational and educational opportunity.

An informed audience is not necessarily an enthusiastic one, and that's where the value of a strong upfront presentation still comes into play. Given the competition for advertising dollars and press attention, not to mention viewers, it still makes sense for networks to do everything they can to propel their prop-

erties to the forefront and leave advertisers and journalists wanting more. It's one thing to read about CBS' new schedule on your smartphone and watch a few clips on your tablet. It's quite another to be seated in Carnegie Hall, long the home of CBS' annual presentation, surrounded by advertising, network and studio executives and the talent from the network's current and future shows, watching those clips on a breathtaking high-definition screen and taking in what is always an extraordinary showing by the network.



Eli Manning and Jim Nantz announce CBS Sports' 2013 Super Bowl presentation at the 2012 CBS upfront at Carnegie Hall

All of this celebration and exposure can work against a new show if its clips indicate that it isn't one of the network's best. Sometimes that is immediately clear to everyone but the network's own executives. (To cite just one of countless examples, how did NBC not see the looming disaster that was *Animal Practice*, the freshman comedy last fall that starred a monkey, when everyone at its upfront presentation couldn't help but see how utterly inane it appeared to be?) But risk has always been a big part of the network game, at least where program development is concerned. Better to look at the positive aspects of the traditional upfront experience, especially as they are typified by some of the more successful presentations.

Looking back over almost a quarter century of upfront week events, which has included large-scale successes and unforgettable failures by each network along the way, two memories stand out: The presentations by The WB at the Sheraton Hotel in midtown Manhattan, and NBC's decision a few years back to forego a formal upfront presentation of any kind in favor of intimate agency meetings. The WB is long gone, having

merged with UPN in 2006 to form The CW, but happy memories of its upfront presentations remain. The WB didn't so much present its programming as immerse its audience in an environment in which everything that the network had done and had planned to do was made to seem even more stimulating than it actually may have been. The WB had its problems along the way, but it was second to none at generating interest in its shows and stars among advertisers and members of the press.

As for NBC, its attempt in 2008 at removing itself completely from the traditional upfront week structure, choosing instead to have small meetings with advertisers and the press beginning in early April of that year, was widely panned. It was simply too dramatic a change for the industry to get behind.

And so it is

that the networks now find themselves caught between the expectations of the old and the realities of the new. It's no longer enough for a presentation to serve as a glorified announcement. Instead, the presentation — and, arguably, the party that follows — must serve to generate interest within the business and provide insight and context into brand, strategy and programming alike. That's the only way to separate the upfront experience for advertisers and the press from what is now an outpouring of new, context-free information directly to the viewing public. **M**



UPFRONT REWIND

## Every Good Turner

For years, only the three networks held upfronts. Then Fox joined and cable

networks began to hold events. Ted Turner would make appearances for his company — and Steve Grubbs said Turner “drew a lot of attention” for cable and was a “great salesman and showman.”

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BY THE  
NUMBERS



Upfronts scheduled for 2013: 52

Billions of dollars in deals closed  
at 2011 cable Upfronts:

**\$9.29 billion**

Shrimp consumed through upfront history: 2,502,000

Cows used as props during an  
upfront presentation: 6

Network shows  
cancelled in  
2012: 29

Most under-  
estimated  
pilot: *The Cosby Show*  
(see p. 14)

Most over-estimated pilot:  
*Studio 60 on the Sunset Strip*

Number of upfront presentations  
attended by Irwin Gotlieb: 181

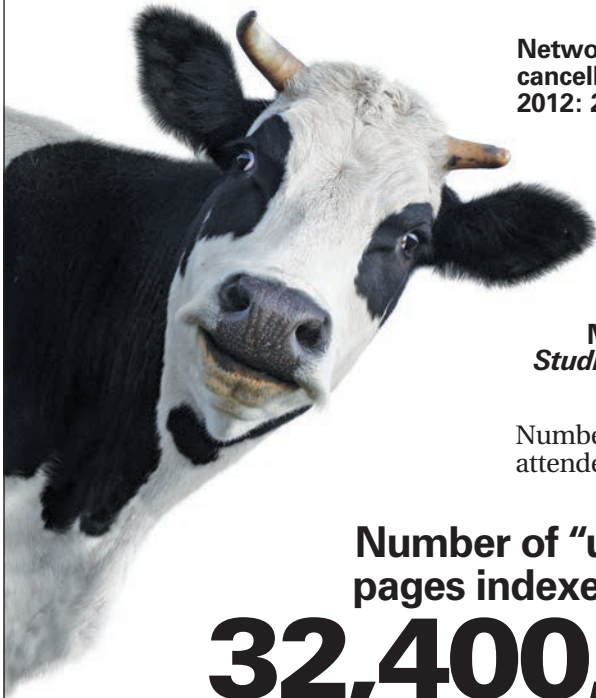
Number of "upfront" Web  
pages indexed by Google:  
**32,400,000**

Number of news articles written about the "upfront:" 28,100\*

Number of articles written about the "upfront" on  
MediaPost: 2,917

Number of blog posts written about the "upfront:" 1,440,000†

\*SOURCE: GOOGLE NEWS †SOURCE: GOOGLE BLOGS



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