

M R C C REVIEW

The newsletter for all media professionals

But the Pilot Was Funny: A Young Media Person's Guide to Evaluating Pilots

Steve Sternberg
MAGNA Global

Every year, at the various upfront presentations, the networks trot out their respective schedules, and tout this or that show as being a cross between this and

that other show. It's almost as though, without these reference points, the networks believe we will not know how to categorize their programs, and viewers won't know whether to watch them.

Table of Contents

- President's Notes2
- Upcoming Events.....2
- Meeting Information2
- FYI6

What Are Viewers Looking For?

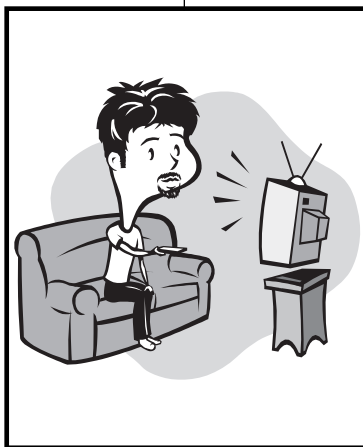
What the networks and studios think viewers want and what viewers actually want are often dramatically different.

Two years ago, the two biggest trends were sci-fi (because of the success of *Lost* and *Medium*) and series about friends and relationships (with *Friends* and *Sex and the City* no longer on the air). Four of the six sci-fi dramas were flops (*Ghost Whisperer* and *Supernatural* made it to season two—and only the former can be considered a success). Only one of the 11 friends/relationship shows is still on (*How I Met Your Mother*).

This past season, there were more unsuccessful clones. *Jericho* and *The Nine* were clearly inspired by *Lost*. Neither is returning this fall (although *Jericho* has been renewed for mid-season thanks to viewer campaigns to keep it on). The serial action drama, successfully developed by FOX, with *24* and *Prison Break*, led to *Kidnapped*, *Vanished*, and *Runaway* (all quickly canceled).

So what did succeed this season, and what do they have in common? Networks and studios please take note. The most successful new fall series were *Heroes*, *Shark*, *Ugly Betty*, and *Brothers & Sisters*. Not only do they have nothing in common with one another, they are substantially different from anything else currently on the air.

The success of *Desperate Housewives* does not mean people are looking for another soap opera, or any more shows set in suburbia. The *American Idol* phenomenon



has not led to other successful singing competitions. The success of *Grey's Anatomy* and *House* does not mean anyone wants another medical show. The failure of most new comedies over the past few seasons does not mean people don't want to watch a new comedy. The success of *24*, *Lost*, *Heroes*, *Ugly Betty*, or *Deal or No Deal* does not indicate anything about what viewers might respond to next.

What do viewers want? The same thing they always wanted, good characters that they look forward to seeing week after week, well-written shows, and maybe something they can watch with their kids in the room (that's not just an inferior knock-off of something they're currently watching).

That being said, how do we actually evaluate the success potential of a new series pilot? First and foremost, we must remember that the pilot is a sales tool to sell the series to the network. Everything but the kitchen sink (and sometimes that too) is thrown into it. But it is also often difficult, particularly with ensemble casts, to flesh out all the characters in a single episode.

continued on page 5

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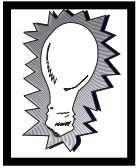
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PRESIDENT'S NOTES

by Julia Johnston
Arbitron

A Reflection on Summer

The final days of summer are upon us and I hope each of you have enjoyed many sunny days doing whatever it is that brings joy to your world. For me, it has been spending many hours applying bottle after bottle of sun block to my daughter's face as she learned to swim, discovered each animal at the zoo and met several relatives for the first time at our family reunion.

There have been many successful MRCC ventures this summer as well. The MRCC summer event in July was a Bowling Party at 10Pin Bowling Lounge. Please help me in thanking Matthew Hodges for planning such a fantastic event, to Telmar for supplying the one-of-a-kind bowling trophies and to AOL for the fun door prizes. Who knew getting the Big Lebowski Award could mean so much!

We also want to mention the soon to be completed Summer Internship Program. This year, the MRCC sponsored two interns: one hosted by Arbitron, Inc. and the other hosted by Comcast Spotlight. The two interns both hail from the University of Illinois at Urbana-Champaign. Valerie Sutkus, intern at Arbitron, Inc. is moving into her senior year pursuing a BS in Advertising. She has been instrumental in assisting Arbitron's Midwest Agency, Advertisers Services team and me with client interaction, market

and prospect research to build sales presentations, as well as database management. Alicia Dyer, intern at Comcast Spotlight, is also starting her senior year pursuing a BS in Advertising. Alicia has been assisting Danny Miletic, Director of Research at Comcast Spotlight, in evaluating new research software applications, creating presentation materials on the capabilities for use with sales teams, as well as reporting solutions to improve department forecasting efficiencies. Congratulations, gratitude and much luck goes out to both young women as they complete their final year of college. I am positive both will have successful future endeavors.

Moving into fall means only one thing – the 6th Annual Preview of the New Fall Season

Moving into fall has benefits – Football, back to school and the Holidays! For the MRCC, it means only one thing – the 6th Annual Preview of the New Fall Season with Sam Armando, SVP Director of Broadcast Research, Starcom. Thanks to Sam, we're sure to leave with insights as to what to look for with the 2007 Fall TV Season. Please be sure to reserve your spot early as this will no doubt be one of our largest luncheons this year and we want to have room for everyone. See you there! **MRCC**

August Meeting Notice

PLEASE RSVP!

Topic	Fall TV Season
Speaker	Sam Armando, SVP Director of Broadcast Research, Starcom
Date	Tuesday, August 14th, 2007
Place	Maggiano's Banquets 111 W. Grand Avenue The Amarone Room
Time	Noon to 2 p.m.
Price	\$35 member \$45 non-member \$5 additional charge for Walk-Ins
Menu	Buffet-style lunch
RSVP	FAX your reservation to 312-846-8277 or RSVP at www.mrcc-online.com by noon Friday, August 10th. Cancellations must be received by Noon on August 13th.

NOTE: Be sure to RSVP to guarantee yourself a seat. We can only handle a small number of walk-ins.

UPCOMING EVENTS

August 14th – MRCC August Meeting on the new Fall TV Line-up



RSVP by Credit Card

Note: The MRCC has made arrangements to accept credit cards via PayPal (Visa, MC, Amex, Discover). This must be done when registering online. Credit cards cannot be accepted at the door. Please be aware that there will be an additional 4% processing fee when paying by credit card.

A "First Look" at the New Upfront

Kara Kramer
AOL Media Networks

Bob Dylan sang "the times they are a-changing"...what an appropriate way to describe today's times. The three largest portals on the Internet had something this year that can be construed as an "Upfront" – but they were called something different (AOL had "First Look", Yahoo! had "In-Front" and MSN had a "Summit"). Even the networks didn't work their "usual" Upfront. This year, many things other than just next season's programming were involved in the Television Upfront - and finally the mix included digital!

I remember working at McCann-Erickson in NY in the 90's as a network TV buyer. Sure, the presentations were interesting and the parties were awesome. But the best thing that happened was working until the next morning planning and assessing the new programming for the upcoming season. A few years later when I moved into the research department, the Upfront took another form. It was a bunch of researchers sitting in a room, looking at the new lineup and deciding what rating and shares we would give to the new programs. We reviewed the trending for the prior few years in that time period and made our decisions accordingly.

The Upfront (or In-Front or First Look) has taken a unique turn this year. Advertisers and clients alike need to better understand how to use the various media in combination in their media mix. Additionally, advertisers and clients need to understand how consumers use the various media together.

Many advertisers are still leery of the Internet, continuing to ponder questions such as: How much of my budget should be allocated to the Internet? Are women (or my target audience) online? Vast support for online abounds: Teens can't live without it; Google bought YouTube for \$1.65 billion dollars; People of all ages are spending almost 17% of their total media consumption time on the Internet (that's nearly 11 hours per week spent online according to SRI/Knowledge Networks, Fall 2006, People 12-64). In fact, Jupiter Research Media Consumption Patterns May 2007 study showed that US adults spend equal amount of time online as they do watching TV. Yet, ad spending is a mere 6% of total media budgets (CMR, FY 2006).

However, research is finally catching up with current trends in television viewing. For example, there are now Average Commercial Minute ratings. This allows more direct comparison to online measurement, as it measures the number of people seeing an ad. This shift in thinking is necessary now that the Internet is practically mainstream and clearly a significant part of consumers' lives.

For this reason, the Network Upfronts of today are alien to the Upfronts of the past. The Network Upfront of 2007 is much less about the programming strategies and more about the media strategies. Network programmers now understand the issue at hand: Consumers, or the audience, want programming whenever and wherever they need it. Programmers are also much more open to having advertisers integrate their product within programs, and are coming up with creative ways for this to happen. This is a good sign, and is a start to what will be the "New Age of Media."

Knowing this, network executives, agencies, advertisers and Internet publishers went into this new Upfront with very different variables at play. The networks have a few obstacles to figure out. DVR penetration is increasing at a dramatic rate, the streaming

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of Web video is attracting the "right" targets, and the new commercial rating is threatening the ways of old.

Forrester Research estimates the penetration of DVRs for last year reached upwards of 20% of households. "This itself wouldn't normally be a problem, but for the fact that these households are also the hottest advertiser targets. They have the most money, are the biggest consumers of technology and other branded goods, and they are young enough that advertisers are eager to build long-term loyalty with them," quoted by James McQuivey, VP Television & Media Technology, Forrester Research. In addition, according to Forrester's survey research, 49% of DVR users say they watch zero commercials on playback. An additional 38% say they watch

continued on page 4

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fewer than 1 in 10 commercials, for a total of 87% of DVR owners who say they watch either no commercials or less than 1 out of 10 commercials. The article in SmartMedia Magazine, May 2007 edition, quotes Andy Donchin saying that Carat "...is very adamant that they don't want to count any DVR ratings when they cannot properly subtract the people who are not watching the commercials."

The streaming of Web video comes on the coattails of this DVR trend. The people who watch online video are an equally hot audience as DVR viewers, but they can't skip the ads (which funnily enough, sounds more like the old television medium than television today). The new OPA Video Research has shown while nearly half of online users – 47% - have watched some kind of video online, one-fifth (19%) regularly watch it. "It is no surprise to advertisers and agencies that in NBC's announced Upfront deal with Nissan, Nissan will be sponsoring "Heroes" in broadcast, but also on the Web, and for that matter, even in the DVD release of the first season," as told by James McQuivey from Forrester.

Another trend that had emerged during the past year is the ratings challenge, specifically, the commercial ratings that Nielsen Media

Research began to release. NBC was the first to agree to live plus 3-day commercial ratings for its 2007 Upfront. It can be expected that the other networks will follow suit. Why is this significant one may wonder? This change reflects the role of the DVR as we have already seen, but it also sets a precedent for how a rating is defined. As quoted by James McQuivey, "Program ratings are now officially on their deathbed because once we make the switch to measuring actual viewership – regardless of how we define the timeframe and the level of engagement – no one will want to go back to program ratings." This new age is all about making media more accountable.

Knowing the issues that the networks need to overcome, let's look at the Internet "Upfront". Various analysts have said that what three big Internet publishers did was not to garner the dollars "Upfront", but was to show advertisers that there are creative ideas and a huge audience online (also referred to as large reach). Admittedly, television does have glitz; however, the Internet with some of its lineup has just as much, if not more. Plus, the ability to "partner" with these production companies seems enticing.

This new age is all about making media more accountable.

Of course network TV had made quite a few celebrities, but the Internet has begun fueling a few careers as well. "Lonelygirl" was even in the news media. She, along with "OK GO" and the "Arctic Monkeys" really made a name for themselves online. However, as David Card from JupiterResearch pointed out, these "celebrities" are more the exceptions than the rule at the moment. That is understandable, and maybe the Internet isn't going to create celebrities, but enable the current celebrities to extend their brand. Just like regular brands, the Internet can help celebrity brands to be whatever they want.

The Internet being a newer medium makes it more natural for online programmers to get marketers involved in actual program creation and scheduling. And, online programming is far more on-demand and less constrained by schedules. There is no new season, and programs are just rolled out one at a time. Perhaps this is better for the new "Person" of the Year, the consumer who lacks time and usually multitasks when viewing media. Thus, multimedia or cross-media campaigns are necessary to reach these desired audiences.

The net net of the Upfronts though is really a great big step in the right direction. With Broadcast now taking new technologies seriously, this is undoubtedly the first of many years to come to figuring out how to work with each of the various platforms. Marrying television with Internet, using VOD on cable as well as Internet, or including DVR ratings with broadcast ones, these questions are just the beginning of what our industry is growing toward. John Wanamaker, the inventor of the price tag, had once said, "Half of my advertising works, I just don't know which half." Hopefully, with these new changes in research, the percentage will continue to increase. **MRCC**

Kara Kramer, Senior Research Manager, AOL Media Networks

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Here are some guidelines:

A comedy should be funny because of the characters, not the plot

In the 25 years or so I've been evaluating programming and developing audience estimates, the two funniest pilots I've seen were NBC's *Golden Girls* and CBS's *The Famous Teddy Z*.

For those of you who don't remember the latter (it didn't last long), it was about a guy who gets a job in the mailroom of a major talent agency. Through a hilarious string of events, he becomes the top talent agent in the company. I saw the pilot at a time when the networks held screenings for most of their new shows. People were literally falling out of their seats laughing. But by episode 2, it was a different show. The one thing that made the pilot so funny no longer existed, and the show could not maintain the level of comedy in the pilot on a weekly basis.

As for *Golden Girls*, I don't even remember what happened in the pilot. That's because nothing really happened. I think the four lead actresses sat around a table talking for most of the pilot. It was funny because the characters were funny. They had chemistry and people tuned in week after week to see them.

The best and most successful comedies, from *Roseanne*, to *Cheers*, to *Seinfeld*, to *Friends*, to *Everybody Loves Raymond* (even *The Simpsons* and *Family Guy*) all have this in common. It's very difficult to write 22 strong storylines in a season. People tune into comedies for the characters, not the plots.

It should be noted that more people than ever are actually still watching *Seinfeld*, *Friends*, *Frasier*, and *Everybody Loves Raymond*, not to mention *Roseanne*, *Home Improvement*, *Fresh Prince*, and *Full House* on off-network outlets. This makes it even more difficult for a new broadcast comedy to catch on — people are comparing them to those comedy classics.

The funniest comedy pilots I've seen for the fall are FOX's *Back to You* and ABC's *Carpoolers*. Each seems more character than plot driven. ABC's *Sam I Am* also looked good, but it may simply be the events of the pilot that made it so. Whether it can continue with this storyline and make it interesting on a weekly basis remains to be seen. We'll need to see how well the ensemble casts gel and whether they hit a chord that makes people want to watch them interact every week.

**It is much easier
to predict a miss
than to predict a hit.**

What will a drama's third episode look like?

It's relatively easy to write one compelling medical, courtroom, or cop episode (well, not for me, but for professional writers). What will subsequent episodes be like? Obviously, we don't have anything beyond the pilot to go on, but we must consider the potential strengths of the lead characters or ensemble aside from the pilot's storyline and guest stars. In other words, is the pilot a good one-time movie or will it make a good series?

The best drama pilots I've seen this season are ABC's *Pushing Daisies*, *Women's Murder Club*, and *Cashmere Mafia*; CBS's *Cane* and *Viva Laughlin*; and CW's *The Reaper*. Only *Women's Murder Club*, *Cashmere Mafia* and *The Reaper* are clearly defined as to where the series is heading. Viewers will likely decide quickly whether to continue watching beyond the pilot.

Shows Make Stars, Stars Don't Make Shows

The number of shows with stars attached that have flopped are too numerous to list here. In most cases, it's the shows that create stars, not the other way around. This is particularly true for younger-skewing series. For recent successes, think *Lost*, *Desperate Housewives*, *Grey's Anatomy*, *Without a Trace*, *Ugly Betty*, *Heroes*, *Prison Break*—all series with relative unknowns. It's true that occasionally a star-driven show such as *Shark* (James Woods) will break through, but it is generally with an older star who brings long-time (older) fans to the show. And, it still needs a strong, compatible supporting cast to succeed.

While stars can be effective in breaking through the clutter and creating some buzz for a new show, after the initial viewer sampling, the show will live or die on its own merits—as will be the case with *Cashmere Mafia*, *Lipstick Jungle*, *Private Practice*, and *Cane*.

Shows Look Better in a Conference Room Than in Your Living Room

A lot of pilots look good in my conference room as I'm watching them during normal work hours, without commercials, on a large flat-screen TV. Often someone will comment on how much they like the show, but when I say it's going to be opposite *CSI* and *Grey's Anatomy*, their response gives me a much better indication as to whether they will actually watch it. Scheduling, of course, is just as important (often more important) than quality.

It's also important to understand that we are not necessarily the target audience. I may not personally plan to watch *Dirty Sexy Money* or *Gossip Girl*, but I have to put personal taste aside and evaluate such things as lead-in, competition, etc.

Most Hits are Accidental

It is much easier to predict a miss than to predict a hit. A dozen or so years ago, most people felt *E.R.* and *Friends* would win their time slot. But no one picked them to be major hits (anyone who now says they did is lying). How many people thought *American Idol* would be anything more than summer filler programming for FOX? More recently, we correctly pegged ABC's *Desperate Housewives* and *Lost* as doing well and *Ugly Betty* as having upside potential, but few thought they'd debut as strongly as they did. *Grey's Anatomy's* performance totally blindsided everyone.

How many people predicted the continued strength of CBS's *NCIS*, *Without a Trace* and *Criminal Minds*? Nobody expected FOX's *House* to be a hit, nor did most see NBC's *Heroes* as the cult hit it has become (although again, we thought it had potential).

I'm still proud of the fact that I was the only one I know who thought *CSI* would do better than *The Fugitive* and that *Judging Amy* would out-perform *Once and Again*. I could discuss why I thought *Alf* would work, but that would really be dating myself.

In the end, you simply never know what's going to click with viewers. The next *American Idol*, *CSI*, *Grey's Anatomy*, or *Heroes* is right around the corner, but we won't know until after it debuts. That's part of what still makes this business so exciting...and exasperating. **MIRCC**

Steve Sternberg, Executive Vice President, Audience Analysis, MAGNA Global

