

AMERICAN BROADCASTERS 2011

- TOP 50 US BROADCASTERS: PROFILES AND STRATEGIES
- PROGRAMMING TRENDS: GENRE AND PRODUCER BREAKDOWN
- INTERNATIONAL OPPORTUNITIES
- HOUSEHOLD AND DEMO RATINGS
- Q&AS: INTERVIEWS WITH TOP EXECUTIVES



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US TV: Commissioning Strategies 2011-2012

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Foreword



Lisa Campbell

Editor, *Broadcast*

Of all the TV markets in the world, the US appears to be the most lucrative. As one producer said recently: “The economics are on steroids. There are so many more eyeballs in the US market and so much money.”

For this 330-page report, *Broadcast* has joined with UK consultant Attentional and its US office to bring you 50 channel profiles detailing the latest programming trends and ratings analysis.

We have also included a detailed market overview of the successes non-US companies have had in this challenging market, as well as garnering the opinions of key people in the US TV business and top TV agents.

Whether you’re seeking information on a channel’s current development slate, key demographics, total viewing figures for top shows, or the best agent for your reality format, it’s all here in one useful resource.



Zak Shaikh

Managing Director,
Attention Inc,
US division of Attentional

The US is the largest revenue-generating market in the world. Unlike any other market, it has studios ready to deficit finance new dramas and entertainment vehicles. A TV pilot alone can cost anywhere between \$5m and \$10m – without any network guaranteeing the show will even air.

While most territories are struggling to finance high-quality productions, the US broadcasting model, particularly on the cable and premium cable side, is flourishing.

Not only does this report highlight the types of series being developed and commissioned, but it also gives a strong sense of each channel’s history. It also details key staff and what they bring to their channels.

This report is the first to tackle this market from an international perspective. We hope you find it useful. If you want to know more about the channels that are the subject of this report, I hope you will contact our consultants either in the US or in the UK. When you have reviewed, we should talk.

Methodology

METHODOLOGY

Channel rankings

The following section contains details of commissioning strategies of 50 US broadcasters. On the 'Vital Statistics' pages, 46 of the channels listed have been given a ranking based on average primetime viewing numbers, as sourced by Nielsen and Attention Inc. Of those missing a ranking, The Sundance Channel and Ovation do not currently report ratings to Nielsen, while Epix and OWN started only in January 2011, making rankings not applicable.

Tiers 1, 2 & 3 explained

Each of the 50 channels profiled in this report has been allocated into one of three tiers:

- Tier 1 lists the broadcasters most receptive to internationally sourced/produced/acquired content.
- Tier 2 broadcasters commission some international content but tend to be largely reliant on the domestic market for content.
- Tier 3 broadcasters may produce international content, but at a much lower frequency.

Channel Profiles Tier 1

VITAL STATISTICS Broadcast/Attentional US Report

Details

President Leslie Moonves

Main commissioner Nina Tassler

Target demographic
Adults 18-49 and 25-54

Key titles
NCIS, Big Bang Theory, The Good Wife, CSI, Two And A Half Men

Genres of programming
Drama, comedy, reality-competition

Average viewership
12.01 million

Ranking
1st

Top-performing show
NCIS

Top-performing international production
Big Brother/Undercover Boss

Slogan
Only CBS

Description

“CBS airs a variety of general entertainment programming and its more traditional content mix has secured its place as America’s number one watched broadcast network for the past 10 years.”

Original versus acquired Original

- International commissions**
- International acquisitions**
- International adaptations**

Current opportunities
Dramas, legal/crime, female-driven

Latest international commissions
The Cube (Objective), Not Going Out (Avalon)

GENERAL INFORMATION

Launched 1 July 1941

Owner CBS Corporation

Network president (CEO) Leslie Moonves

Address 51 West 52nd Street Fifth Floor

New York City, NY 10019

United States

Telephone (212) 975-4321

7800 Beverly Boulevard

Los Angeles, CA 90036

United States

Telephone (323) 575-2345

Website www.cbs.com

Sister networks The CW, Showtime

Number of subscribers 106 million domestic homes

Target demographic Adults 18-49, adults 25-54

Service hours 24 hours a day, Monday-Sunday

Competition ABC, Fox, NBC

USP CBS, as one of the world's oldest broadcasting networks, manages to continue with its long history of providing a wide variety of television programmes to more than 200 affiliate stations in the United States, including 20 stations owned by Viacom, to become the nation's top network.

Brand extensions BNET, CBS Moneywatch, CHOW, CNET, Last.fm, MaxPreps, Metacritic, mySimon, TechRepublic, The Insider, TV.com, Urban Baby, ZDNet, Game Spot

Key commissioners

Nina Tassler (president of programming)

Kelly Kahl (EVP, primetime)

David Brownfield (SVP, current programming)

Stacey Adams (VP, current programming)

CHANNEL INSIGHT

CBS started as one of the largest radio conglomerates in the United States in the late 1920s and, though now a television network, CBS has stayed in the foreground of entertainment since its inception. Currently the most-watched network in the US, CBS has kept this position for almost a decade.

The key to rising back to the top of the ratings came around the summer of 2000, when CBS aired the surprise summer hit *Survivor*. When the success of this reality show brought a new demographic of viewers to the usually older-skewing network, CBS's current chairman and then chief executive of television, Les Moonves, made it a priority to skew network programming towards a broader yet younger audience. The key to CBS's continued success, however, is that the network did this without alienating its older demographic.

The trick was in the procedural shows. CBS focuses its drama development on typically easy-to-follow detective series (called procedurals in the US) usually employing flashy technology and archetypal detective characters. These series have spawned entire brands such as the *CSI* franchise and the two *NCIS* series. The network has been unable – or rather unwilling – to launch a serial drama, but its detective procedurals have flourished, including *Without A Trace*, *Criminal Minds*, *The Mentalist* and, in 2010, the revamp of the classic series *Hawaii Five-O*.

Now able to capitalise where other networks have not – attracting both young and older viewers by programming easy-to-follow procedural dramas and classic family-friendly multi-camera comedies (*Two And A Half Men*) –

CBS enjoys its place as the number one, most-watched network.

CBS mostly licenses its comedies and dramas from production company partners via its in-house studio, CBS Studios. That said, the network is more open to using other studios (Warner Bros, 20th Century Fox) than its rival broadcast networks, ABC, NBC and Fox.

Key trends

- Thanks to ratings-topper *American Idol*, CBS Network's top competitor is typically thought to be Fox. For both the 2008-2009 and the 2009-2010 seasons, the two networks have had almost identical ratings in the 18-34, 18-49 and 25-54 demographics.
- Mark Burnett, the producer behind CBS hit show *Survivor*, which has consistently been Emmy-nominated since the awards added a reality category, currently has a hit reality series on the top four broadcast networks – *The Apprentice* on NBC, *Are You Smarter Than A Fifth Grader?* on Fox syndication and *Shark Tank* on ABC. Of the three, CBS's *Survivor* is still the ratings winner.
- *CSI: Crime Scene Investigation*, a Jerry Bruckheimer and CBS Studios production, was the first series to spawn multiple franchise spin-offs, including *CSI: Miami* and *CSI: New York*. To date, more than 580 episodes of the *CSI* franchise have aired, but the original *CSI* still remains the most popular. It has also launched a number of novels, comics and computer games.
- The CBS slogan has changed several times in the past decade as the network climbed in the ratings. The 2010/2011 season's promotional campaign declared, 'Only CBS', while proclaiming it had "TV's top-rated shows and TV's best new shows, all under one roof".
- Former president of CBS Network Television Entertainment Nancy Tellem is now the senior adviser to chief executive Les Moonves. It was under her guidance as the primetime scheduler that shows such as *CSI*, *Survivor* and *Everybody Loves Raymond* made it to air.

Audience profile

THE CBS VIEWER (2009)	
Female audience	57%
Male audience	43%
Median age (women)	51
Average household income	\$66,000
Proportion of 25-54	70%
Attended/graduated college	45%

Source: Nielsen/MRI

- Rumours in spring 2010 that lead actor Charlie Sheen, who has been embroiled in drug-related scandals for years, was considering leaving the record-breaking Warner Bros-produced *Two And A Half Men* led the network to offer him upwards of \$1.8m per episode. Sheen renewed his contract for another two years. Soon after the autumn 2010 premiere, Sheen was embroiled in another drug scandal that actually led to higher ratings for the show. *Two And A Half Men* regularly surpasses 14 million viewers per episode and is America's number one-rated sitcom in all households.

CURRENT PROGRAMMING

Fairly broad-skewing, CBS is best known for its “traditional” television. This is predominantly detective procedurals and classic multi-camera sitcoms. Thus, genre-wise, CBS content is not extremely diverse. Dramas tend to lean towards police and medical or legal shows, while comedies tend to be family comedies.

In the most recent season, CBS has made another effort to rope in younger viewers by expanding the *NCIS* franchise to include *NCIS: Los Angeles* and casting well-known male actors as the detectives (including rapper LL Cool J and film actor Chris O'Donnell). It has also successfully revamped the classic *Hawaii Five-O* series, making it into a splashier, trendier version of the original, again with younger leads, most of who have had success in other CBS-produced series.

Because CBS has two of the most successful reality series on the air, between *Survivor* and *Amazing Race*, the focus to create more reality series has not been a primary one. The moderately successful *Undercover*

Boss, produced by the UK's Studio Lambert, has enjoyed staying power – but this is a rare occurrence, with new factual entertainment series struggling to break into an established schedule.

It has been said by executives at the network that the show's prior success on the UK's Channel 4 helped *Undercover Boss* secure on a strong timeslot and series commitment. For the most part, new CBS series tend to be in the scripted arena.

Schedule

- In September 2008, Lifetime Television purchased the re-run rights for *How I Met Your Mother* in a four-year syndication deal that required CBS to produce five full seasons of the show. Luckily, the show has been a fairly consistent ratings winner and is now in its sixth season.
- Over season seven (2009/2010), *Two And A Half Men* almost continually ranked as the number one show in its timeslot and for the night. But the series has never returned to its season two ratings, during which viewership reached 24.2 million, a record for the series. *Two And A Half Men* was not only the overall number one broadcast series in 2009/2010, it also became the number one comedy in syndication, where it is distributed by Warner Bros.
- Named as one of the “five best new shows of 2010”, the CBS series *Blue Bloods*, starring veteran TV actor Tom Selleck, was slated on Friday nights at 10pm, which is typically not a hit-launching timeslot. While hopes may not have been high for the series, DVR viewings

CBS's autumn primetime schedule 2011

	8.00	8.30	9.00	9.30	10.00	10.30
Mon	How I Met Your Mother	2 Broke Girls	Two and Half Men	Mike & Molly	Hawaii Five-0	
Tue	NCIS		NCIS: Los Angeles		Unforgettable	
Wed	Survivor: South Pacific		Criminal Minds		Crime Scene Investigation	
Thur	The Big Bang Theory	How to Be A Gentleman	Person of Interest		The Mentalist	
Fri	A Gifted Man		CSI: NY		Blue Bloods	
Sat	Rules of Engagement	Comedytime Saturday	Crimetime Saturday		48 Hours Mystery	
Sun	The Amazing Race		The Good Wife		CSI: Miami	

have led *Blue Bloods* to decent ratings and the show occasionally helps CBS win the night.

- One of the few female-driven dramas on CBS, *The Good Wife* premiered to 13.71 million viewers at the start of the 2009 season and remained first in its timeslot for almost its entire first season, but it ended the season with a median viewer age of 58, making it TV's oldest-skewing drama. The network is now striving to lower the median age of the critically acclaimed drama to attract more ad revenue.
- CBS made an unexpected move at the start of the 2010/2011 season by launching a Thursday comedy night, to directly threaten NBC's current hold on the genre in that timeslot. Moving the hit series *Big Bang Theory* and launching the new Twitter-based William Shatner series, *##*! My Dad Says*, CBS went after the 8pm hour on Thursday night in full force and has yet to suffer for it. However, despite consistently winning the night in total viewers, CBS still falls short of NBC in the highly coveted 18-49 demographic come 9pm, mostly due to the popularity of *The Office*.
- Most of the network's dealings with international producers are in reality formats, primetime game shows and the occasional adaptation of scripted series. Over the years, it has aired Endemol's *Big Brother*, ITV Studios' *Game Show Marathon* and Studio Lambert's *Undercover Boss*. While CBS is selective over which formats it develops, there has been a consistent history in working with international producers, especially in formats.
- Even in dramas and comedies, CBS has often commissioned adaptations, such as Hat Trick's *Worst Week*, which – despite having it lasted only one season – ended up with more US episodes produced than UK episodes (for BBC). An example of a UK series being commissioned but not ending up on the schedule is *NY-LON*, originally on air on Channel 4. CBS ordered a US version of the show, with local production house Beacon having acquired the format rights via Pangea (a US management company that represents UK producers such as Ecosse, Maverick, Red and

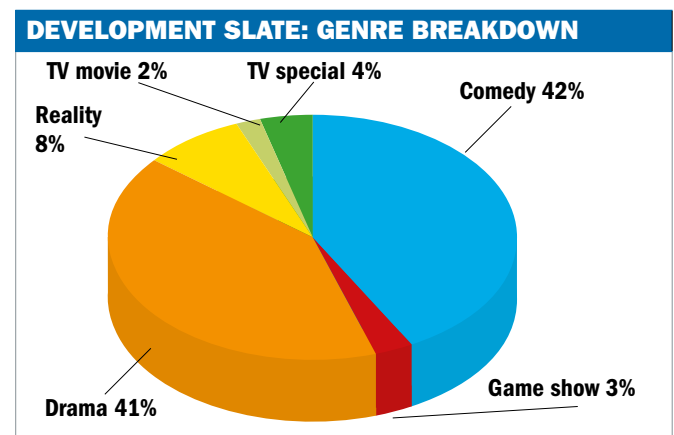
Objective). *NY-LON* never made it past the pilot stage, but it indicates that CBS is very open to different ways of working with, and developing, series that are sourced from outside the US.

- In 2010, CBS ranked second in Emmy nominations with 57, only outranked by ABC's 63 nominations.

COMMISSIONING TRENDS

The adage “if it ain't broke, don't fix it” fits the CBS brand perfectly. The largest percentage of development is going towards shows that echo the successful slate the network already has – procedural dramas and studio-based comedies.

There is a move, however, to pick up more workplace comedies, perhaps to compete against the workplace-dominated Thursday night line-up on NBC. Furthermore, more reality shows are in development, perhaps to partner with *Undercover Boss*.



Source: Attention Inc

There are approximately 140 shows in development for CBS. Some of the key titles that are the latest in development from the different genres include:

Commissions with an international origin (ie outside the US)

CBS/Mark Wilson/Patrick Mckenna cop drama (Drama) – CTV Productions & White Pine Pictures Police drama. In development.

Division 5 (Drama) – CBS Television Studios & Shine International

An FBI taskforce tracks down threats facing the nation. In development.

Live To Dance (Reality) – Shine International

Based on the Sky 1 series *Got To Dance*, the show has amateur dancers ranging in age and style who compete in front of a panel of judges. Viewers at home vote for their favorite dancers during the semi-finals and finals. Ordered to series.

Not Going Out (Comedy) – CBS Television Studios & Avalon Television

Comedy based on the British series of the same name in which a man shares an apartment with his best friend's ex-girlfriend. Complications ensue when his buddy decides he wants his girlfriend back, unaware that a romance has sprung up between the two. Pilot script ordered.

The Cube (Game show) – Objective Productions

Game show where contestants competing from inside a giant glass cube must complete tasks within a limited amount of time. Based on the show that aired on ITV1. Ordered to series.

The Quinn-Tuplets (Drama) – CBS Television Studios

Based on the Israeli series that follows the personal and professional lives of the adult Quinn quintuplets. Pilot wrapped.

Key US commissions

America's Strongest American (Reality) –

Sony Pictures Television Studio, IMG Media, & Embassy Row, LLC

Reality show where people compete in a series of challenges to see who deserves the title of strongest American. Ordered to series.

Apex Predator (Drama) – CBS Television Studios & Intellectual Property Group

A team of detectives work together to take down dangerous predators. In development.

CBS/Peter Knight consulting firm comedy (Comedy) – Sony Pictures Television Studio & Happy Madison Productions

A workplace comedy about assistants and junior executives at a consulting firm. Pilot script ordered.

Confessions Of A Contractor (Drama) – 20th Century Fox Television & Midd Kid Productions

Drama based on the novel of the same name in which a Los Angeles contractor renovates the homes of the rich and famous and falls in love with two female clients – who happen to be former best friends. In development.

Father's Club (Comedy) – CBS Television Studios & Tannenbaum Company

A group of men bond when they become fathers. In development.

Knife Fight (Drama) – CBS Television Studios & Timberman/Beverly Productions

A public defender decides to become a prosecutor in order to find the truth. Pilot script ordered.

Mind Games (Drama) – CBS Television Studios & Apostle Pictures

A female psychologist, who specialises in memory, teams up with a tough detective in order to solve crimes. In development.

One If By Land (Comedy) – Lionsgate, Ish

Entertainment, Category 5 Entertainment

Comedy set in a New York restaurant famed for sparking romance between innumerable couples. In development.

The Same Name (Reality) – 51 Minds Entertainment

Reality show in which celebrities swap places with individuals who share their name. Picked up for production.

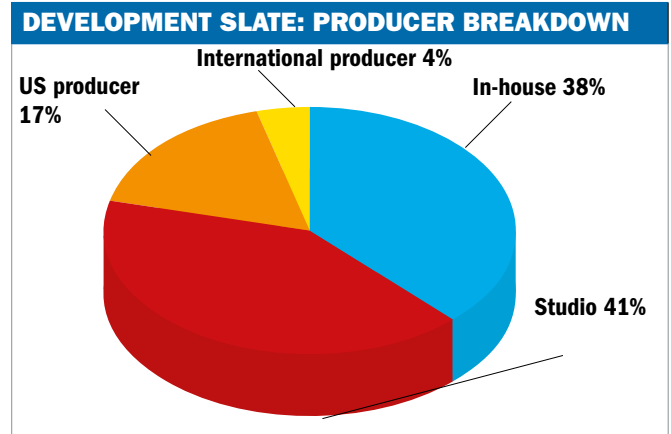
Your Mom Sucks (Comedy) – Warner Bros Television & Mohawk Productions

On moving to a new city, a teen encounters problems when his mum is made principal of his high school.

Rolled over to season 2011/2012.

Analysis

CBS's development slate is comprised mostly of in-house and studio productions. This is typical of most of the broadcast networks. While working with international producers represents only 4% of its commissioned projects, the total volume is fairly high, given that the network has more than 140 shows in development. Also, there are some cases where foreign producers are attached to a project that a studio has set up with the network. In this case, the studio is clearly the dominant partner, but foreign producers should be encouraged that US networks are open to sourcing their material outside the US. CBS, particularly, is open to Canadian productions, having previously acquired Canadian series *The Bridge* to air in the less competitive summer schedule.



Source: Attention Inc

TOP 10 SERIES (JANUARY-DECEMBER 2010)

	Programme title	Original/acquired	Genre	Producer
1	NCIS	Original	Crime drama	CBS Studios
2	The Mentalist	Original	Crime drama	Warner Bros TV
3	NCIS LA	Original	Crime drama	CBS Studios
4	Two And A Half Men	Original	Comedy	Warner Bros TV/Chuck Lorre Productions
5	CSI	Original	Crime drama	CBS Studios/Jerry Bruckheimer
6	Survivor: Hero/Villain	Original	Reality competition	Mark Burnett Productions
7	Survivor: Samoa	Original	Reality competition	Mark Burnett Productions
8	The Big Bang Theory	Original	Comedy	Warner Bros TV/Chuck Lorre Productions
9	Criminal Minds	Original	Crime drama	ABC Studios/Mark Gordon Company
10	CSI: Miami	Original	Crime drama	CBS Studios/Jerry Bruckheimer

NEW MEDIA

- CBS is not only the number one broadcast network, but its website, CBS.com, is the number one broadcast network site in online streaming, with 6.3 million unique visitors per month. Part of the reason for that is because the other network websites have given way to Hulu (NBC, Fox and ABC shows can all be accessed there), while CBS has retained some independence.
- Other popular CBS interactive sites include: popular food site CHOW; popular music site Last.fm; popular movie ratings site Metacritic; and popular television information and trivia site TV.com. *The Good Wife* is the second highest-rated show on Metacritic, following another critical darling, AMC's *Mad Men*.
- The CBS online brand includes wiki-gadgets and links, message boards and games. The "real time viewing room" allows viewers to catch up on their favourite shows while also live-chatting with other viewers.
- CBS currently offers no shows on On Demand, despite the fact that similar broadcast networks such as NBC and ABC do. CBS online does, however, have standalone webisodes that are series in themselves, not connected to CBS shows. For instance, *Hook Me Up*, a dating show, and *Clark And Michael*, a mockumentary about Michael Cera's ambitions to write a TV series.