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Active Engagement

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New season predictions

Find an audience quickly or be cancelled, that is the reality for new shows. Predicting a show's chances of survival is difficult but MEC has stared into the future and picked the winners and losers. The winners will survive the season and the losers will be cancelled, well maybe, sometimes the crystal ball is cracked.

Monday:

Accidentally on Purpose (City) - Loser

Trauma (City) - Loser

Tuesday:

NCIS:LA (Global) - Winner

The Good Wife (Global) - Loser

Wednesday:

Parenthood (City) - Winner

Hank (A) - Loser

The Middle (A) - Loser

Glee (Global) - Winner

Modern Family (City) - Winner

Cougartown (City) - Winner

The Beautiful Life (A) - Winner

Melrose Place (Global) - Winner

Eastwick (A) - Loser

Thursday:

Vampire Diaries (CTV) - Winner

Community (City) - Loser

Flash Forward (A) - Winner

Sunday:

The Cleveland Show (Global) - Winner

Flash Forward to Vampire Glee and the loss of E!

The New Fall Television Season

The red carpets have been rolled up from this year's upfront presentations and now the fate of the new shows is up to the viewers. The new season brings excitement, optimism and with Jay Leno's new show (City) changing the face of primetime, more than a little curiosity. Will City's big commitment to programming payoff? Will Global increase their share of top properties or will CTV continue to tower over the competition? Regardless of what critics think, it all comes down to viewers, and they could and often do surprise us.

Things are back to normal this television up-front season after last year's limited pilot development brought on by the writers' strike. This year full pilots are back and they look strong. Canadian broadcasters have picked up a total of 23 new shows consisting of 6 dramas, 9 sitcoms, 2 realities, 3 talk shows and 3 science-fiction themed programs. The biggest change this season is that Canwest will not be programming their E! stations beyond the summer after putting them up for sale. With a buyer found for only two stations (CHCH-Hamilton and CJNT-Montreal), the remaining three stations will go dark. It will be interesting to see where the E! viewers go. With City picking up some of E!'s top properties they look like they could be the big winner but ultimately the ratings will simply disperse across all broadcasters. Fingers are crossed that all stations will be purchased to maintain

marketplace competitiveness and inventory.

The 2009-2010 season has a little something for everyone, from off-beat comedies like *Modern Family* (City) to the more traditional medical and courtroom dramas such as *Trauma* (City) and *The Good Wife* (Global). Reality programming continues to be a mainstay on the schedules with top properties such as CTV's *You Think You Can Dance*, Citytv's *The Biggest Loser* and CBC's new entry *Battle of the Blades*. Fans who loved the movie *Twilight*, will be thrilled with the arrival of *Vampire Diaries* on CTV.

Wednesday night will be the new season's biggest battleground with almost all new programming. Viewers will have a difficult time settling on their new favorites with this concentration of new content.

With E! not being programmed, Canwest will focus on building on their key Global programs, *House*, *24*, *Survivor* and *Heroes*. The network is introducing new shows with built-in audiences with the franchise expansion programs *NCIS: Los Angeles* and *The Cleveland Show* (*Family Guy* spin off). They are also looking to attract female audiences with a remake of *Melrose Place* and the courtroom drama *The Good Wife* starring *ER*'s Julianna Margulies. Global has also picked up one of the most talked about new programs, the musically themed *Glee*, which is being hyped as this year's breakout hit.

CTV continues to dominate the Top 20 with properties like *Grey's Anatomy*, *Desperate Housewives* and *The Amazing Race*. With very few holes in their schedule, the network opted to pick up just two new shows for the fall. Oprah's highly anticipated daytime talk series *Dr. Oz* and the *Twilight* inspired *Vampire Diaries*. CTV has put the lion's share of new programming on the A-Channels with five new programs: *Back to You* co-stars Kelsey Grammer and Patricia Heaton are given another shot in separate but back-to-back shows *Hank* and *The Middle*; the OC's Misha Barton stars in Ashton Kutcher's *A Beautiful Life* which is followed by the series *Eastwick* (based on the *Witches of Eastwick* movie). The breakout hopeful for A is *Flash Forward*. The anticipation keeps building for this sci-fi program, as Disney is continuing to withhold the pilot.

Over at Rogers, City's schedule takes an aggressive approach with lots of fresh programming. The pick-up of *The Jay Leno Show*, five nights a week at 10pm, is a perfect fit for their schedule. City realizes this will not be a big ratings generator but it does provide a viewing alternative in a time period in which they historically have trouble competing. The show will stay on air as long as NBC deems it feasible to continue cutting costs in

primetime. City really needs this to work from a programming perspective as it will leave a big void if it fails. On the prowl for the new *Friends*, the network has also picked up promising sitcoms like *Accidentally on Purpose*, *Modern Family*, *Cougartown*, and *Community*. Not to be void of drama, *Parenthood* and *Trauma* have been included to lend some intensity to the schedule. Hoping to create ratings consistency, their revamped lineup is also boasting some of the former E!'s top properties, including *The Biggest Loser* and *How I Met Your Mother*. For the first time, Citytv is stepping up to the big leagues and giving some competition to CTV and Global.

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Not just new programming, also new measurement

New programs are just part of the story for the upcoming television season – the industry is also transforming its electronic measurement system. PPM (personal people meter) data will replace MarkII (set-top box) data starting September 1st. This change in measurement technology also comes with a different sampling methodology and reporting of out-of-home viewing.

PPM measurement is the next step in the evolution of audience measurement. It is designed to give a more accurate collection of viewership across all platforms and locations. PPM will give us all exposure to television, for all panel members, regardless of location or platform, as long as the audio is audible to the human ear (and has been encoded by the station). With current MarkII measurement methodology, only viewing within the home using traditional television screens is measured - for family members and visitors. Set-top box systems are difficult to install with current television technology - panellists with high-end systems were not comfortable with having the meter hard-wired. With this reluctance BBM was not able to recruit a panel that was reflective of use of current technology, and thus current viewing habits. With PPM measurement, panellists wear the recording device, and technicians are not required to install anything in the home.

It is important to remember, the new measurement will not change the viewing habits of Canadians, but it will give us

a better measure of how, when and where they are watching.

BBM has released preliminary average minute audience (AMA) for PPM data with a comparison to the MarkII data. NOTE: this is not the currency which television is traded - 13 week program GRPs averages are used.

Here is a quick synopsis of our findings.

PPM produces higher AMA levels than Mark II.

- Approximately 20% increase in average minute audience (AMA)
The highest increases are for the younger demos
PPM found more female audience for sports stations
- Audience size doubled for teens 12-17 in Toronto and Calgary, in Vancouver, it is up 70%
- In Toronto and Calgary, conventional viewing for children 2-11 doubled or tripled across all dayparts. In Vancouver, this increase happened only after 6pm

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