

THE UPFRONT

HOW IT'LL ALL SHAKE OUT

As consumers and marketers weigh their options in the face of a mortgage crisis, credit issues, inflation, and price hikes in gasoline and commodities, many industry observers expect the annual TV upfront market can't help but be affected. On the networks' side are a tight scatter market and a presidential election to decrease the amount of time

available for marketers. On the marketers' side are all the other media options out there and some well-earned knowledge from experiments conducted during the writers strike. Here's a look at the five broadcast players, what they'll be pitching and how well we think they'll do persuading marketers to lay down the bucks. —BRIAN STEINBERG

ABC

AD AGE'S PREDICTION:  **FLAT**

PROS

Some of the best-known shows on network TV: "Lost," "Desperate Housewives" and "Grey's Anatomy." Advertisers want to be in these programs, and a run on them creates scarcity.

CONS

Those shows are starting to age. Also, ABC's track record with comedies remains iffy, despite the successful launch of "Samantha Who?" Buyers say ABC's entertainment and ad-sales executives remain "conservative" when it comes to product placement and branded entertainment.

RATINGS

Among 18- to 49-year-olds, ABC's live-plus-same-day ratings are off 16% for the season as of May 4. In total households, ABC is down 8%.

LAST YEAR'S ESTIMATED PRIME-TIME TAKE

\$2.4 BILLION

up from 2006's \$2.2 billion

CBS

AD AGE'S PREDICTION:  **SLIGHTLY DOWN**

PROS

The most durable stable of programs on network TV. Its airwaves are chock-a-block with easy-to-comprehend procedural dramas, and the network isn't overly reliant on kooky reality programming.

CONS

CBS has found it difficult to branch out and launch shows that target niches. As reliable as its lineup is, it skews older, media buyers say. And the writers strike cramped the network's style: Its first-quarter performance dropped compared with 2007 averages in total audience and among those 18 to 49 and 25 to 54.

RATINGS

Among 18- to 49-year-olds, CBS's live-plus-same-day ratings are down 23% for the season as of May 4. In total households, CBS is down 21%.

LAST YEAR'S ESTIMATED PRIME-TIME TAKE

\$2.45 BILLION

up from 2006's \$2.4 billion

NBC

AD AGE'S PREDICTION:  **SLIGHTLY DOWN**

PROS

Buyers are impressed by digital extensions and NBC Entertainment Co-Chairman Ben Silverman, who is extremely open to advertiser involvement in new shows. The Olympics telecast should add some heft.

CONS

Those ratings! NBC is still the fourth-place network and has failed for years to launch a hit on the order of past glories such as "Frasier" and "Friends." The network's love of reality fare such as "Deal or No Deal" and "The Biggest Loser" is tarnishing its reputation for reaching urbane, high-income audiences.

RATINGS

Among 18- to 49-year-olds, NBC's live-plus-same-day ratings are off 11% for the season as of May 4. In total households, NBC is also down 11%.

LAST YEAR'S ESTIMATED PRIME-TIME TAKE

\$1.8 BILLION

down from 2006's \$1.9 billion

FOX

AD AGE'S PREDICTION:  **SLIGHTLY UP**

PROS

As always, great momentum in the second half of the season. Even without "24," network has managed increases among audiences 18 to 49 and 25 to 54, as well as total households.

CONS

Despite the network's decision to jettison some baseball, it's proved difficult for Fox to launch hits in the first half of the season, as seen by the middling performances of "K-Ville" and "Back to You." And some Fox programming is simply too edgy for broad-reach advertisers.

RATINGS

Fox is the only net with bragging rights, with live-plus-same-day ratings among 18- to 49-year-olds up 5% as of May 4. In total households, Fox is up 4%.

LAST YEAR'S ESTIMATED PRIME-TIME TAKE

\$1.9 BILLION

up from 2006's \$1.8 billion

CW

AD AGE'S PREDICTION:  **DOWN**

PROS

Targets hard-to-reach teens and young consumers. The CW has been extremely creative in establishing new ad formats, including "content wraps." Its would-be flagship show, "Gossip Girl," is a buzz maker.

CONS

Ratings performance overall is disappointing; buyers expect the fledgling outlet to take it on the chin in the upfront. The network isn't streaming last few weeks of "GG" online, a bold but risky gambit to get younger viewers to watch the boob tube for first-run fare.

RATINGS

Among 18- to 49-year-olds, the CW's live-plus-same-day ratings are off 24% for the season as of May 4. In total households, CW is off 23%.

LAST YEAR'S ESTIMATED PRIME-TIME TAKE

\$1.8 BILLION

down from 2006's \$1.9 billion