

Syndication Report

BY MARC BERMAN



NBC UNIVERSAL

HANDS-ON HOST
Maury can expect some measure of short-term ratings lift from the steamy tabloid headlines Povich has generated recently. Here he is, in a more innocent moment on set.

FIRST-RUN

Talk

The departure of NBC Universal's *Starting Over*, which failed to find an audience after three seasons, and Buena Vista's sophomore *The Tony Danza Show*, frees up two weekday hours in syndication. But given the upcoming arrivals of *Rachael Ray*, *Megan Mullally*, *Dr. Keith Ablow* and *Greg Behrendt* in daytime talk, 11 shows currently in the genre will increase to 13. Is there room for what syndicators hope is a "lucky" 13?

Also of note in daytime, despite not being syndicated, is the surprise return of Emmy favorite Rosie O'Donnell as the new co-host on

ABC's *The View*. O'Donnell, who stepped down as host of her Warner Bros. talker despite still relatively healthy ratings in 2002, replaces Meredith Vieira (at a reported salary of \$2 million per year—\$5 million below Vieira's annual paycheck). Vieira, of course, will join NBC's *Today* show next fall as Katie Couric heads to the choppy waters of network news as anchor of *The CBS Evening News*. Good luck to all!

At present, there is no stopping *Oprah*, which outdelivers No. 2 occupant *Dr. Phil* by as much as 52 percent despite minor year-to-year erosion. Excluding the 1998-99 season (when the punches were flying

▶▶ Part 3/2005-06 Season

THE THIRD OF OUR THREE-PART YEARLY SYNDICATION RATINGS SUMMARY FALLS ON THE EVE OF THE UPFRONT SELLING season—just the tool needed to determine if the advertising marketplace warrants the projected 5.1 percent revenue increase. According to PQ Media, which publishes research covering the advertising and marketing industry, spending in syndication in 2006 is projected to top \$2.954 billion compared to \$2.810 billion in 2005 (including upfront and scatter dollars). And that number is estimated to increase to \$3.082 billion in 2007. “The inherent advantage of syndication is the familiarity of the established product,” says Dr. Leo Kivijarv, PQ Media’s vp and head of research. “First-run strips like *Oprah*, *Wheel of Fortune* and *Entertainment Tonight* can last for decades because viewers embrace the personalities and the concepts.”

Waiting in the wings for fall 2006 are talk shows hosted by Rachael Ray (King World Productions), Megan Mullally (NBC Universal), Dr. Keith Ablow (Warner Bros.) and Greg Behrendt (Sony Pictures Television), which is not unusual given that 70 first-run talkers have been launched since 1994-95. (Four out of five new shows in this category never make it to a second season). And, following the marginal success of recent entry *Judge Alex* from Twentieth TV, two new court strips will roll out—*Cristina’s Court* from Twentieth, and *Judge Maria Lopez* from Sony. *Desire*, a series of U.S.-made telenovelas that was also slated for syndication, has been moved over to MyNetworkTV, while rumors of a Patricia Heaton talker from Buena Vista TV have not been confirmed by the syndicator. One recent announcement that could potentially shake up the tired weekend mix (which is excluded from our rating results given the lack of movement) is the 10-market test run this spring of first-run sitcom *House of Payne* from Debmar-Mercury. Plans are to take it national in fall 2007. “Once a staple in the marketplace, the first-run comedy has all but evaporated,” notes Brad Adgate, Horizon Media senior vp of corporate research. “But if *House of Payne* clicks, the mentality of imitation could rejuvenate a once-prosperous category.”

Our ratings summary provides season-to-date ratings in households and two target demographics (with change versus the comparable year-ago period in parentheses for all established series). And we use Nielsen Media Research average audience data comparing Sept. 5, 2005–April 30, 2006 to Sept. 6, 2004–May 1, 2005.

fast on dominant *Jerry Springer*), *Oprah* has finished every season as the top-rated talk show since it debuted 20 years ago. *Dr. Phil* ranks a rock-solid No. 2, besting the rest of the pack by comfortable margins. Although *Maury* is close to year-ago levels, controversy often fuels audience interest—host Maury Povich has generated plenty of steamy headlines in the tabloids the last few weeks—so there is every reason to believe that the show could get a ratings boost. Only Warner Bros.’ *The Ellen DeGeneres Show*, meanwhile, is up across-the-board, with growth of between 14 percent and 21 percent.

NBC Universal’s infamous host Jerry Springer, who recently celebrated his 3,000th episode and was bestowed with that rare New York honor with a sandwich named after him at the famed Carnegie

Deli (see *Media Elite* on page 42), is tied with Paramount’s *Montel* for the No. 7 spot in households, while trailing *Montel* by one-tenth of a rating point in both surveyed demos. *Springer* is on par from one year earlier demographically, while *Montel* is down by 19 percent.

In freshman series news, NBC Universal’s *Martha* is flat at a modest 1.7 in households, one-tenth of a rating point ahead of Warner Bros.’ *The Tyra Banks Show*, while *Tyra*’s advantage over *Martha* among women 18-49 is a solid 50 percent. (In women 18-34, *Tyra*’s lead over *Martha*—1.3 vs. 0.6 rating—is a heftier 117 percent). Both talkers are neck-and-neck among women 25-54.

As for *Starting Over* and *Danza*, time should have run out for both series at the end of season one.

SHOW / SYNDICATOR (CABLE EXPOSURE)	HH	W18-49	W25-54
OPRAH KING WORLD (OXYGEN)	7.1 (-5)	4.4 (-4)	5.1 (-4)
DR. PHIL KING WORLD	5.2 (-2)	2.9 (-9)	3.4 (-6)
LIVE WITH REGIS & KELLY BUENA VISTA	3.4 (-3)	1.7 (-11)	2.1 (-5)
MAURY NBC UNIVERSAL	2.8 (-3)	1.9 (-5)	1.8 (-5)
ELLEN DEGENERES WARNER BROS. (OXYGEN)	2.4 (+14)	1.5 (+15)	1.7 (+21)
MONTEL PARAMOUNT	2.0 (-17)	1.3 (-19)	1.3 (-19)
JERRY SPRINGER NBC UNIVERSAL	2.0 (-9)	1.2 (NC)	1.2 (NC)
MARTHA* NBC UNIVERSAL	1.7	0.8	1.0
TYRA BANKS* WARNER BROS. (OXYGEN)	1.6	1.2	1.1
STARTING OVER NBC UNIVERSAL	1.1 (NC)	0.8 (-11)	0.9 (-10)
TONY DANZA BUENA VISTA	1.1 (-15)	0.5 (-17)	0.6 (-14)

* NEW



BUENA VISTA

STAYING OR GOING?
 Few people believe *Millionaire* host Vieira (right) will keep this job as well as handling anchor duties at NBC's *Today* show.

FIRST-RUN

Game/Relationship

The game show part of this category has been pretty healthy this season, but the fall portends changes. *Dancing With the Stars* runner-up John O'Hurley will replace the axed Richard Karn on Tribune's *Family Feud* (the fifth host in the game show's history), and there is speculation over who (if anyone immediately) will replace upcoming *Today* show co-host Meredith Vieira on Buena Vista's *Who Wants to Be a Millionaire*. King World's *Wheel of Fortune* and *Jeopardy*, the longtime leaders of the genre, remain comfortably in charge.

But for the other part of this category, the rapidly shrinking dating/relationship genre, Warner Bros.' *ElimiDate* is the next expected casualty. That will leave NBC Universal's fading *Blind Date* as the last strip of this kind left standing.

Although no official announcement has been made, the departure of *ElimiDate* executive producer Alex Duda for a stint in the same capacity on the syndicator's *The Tyra Banks Show* means there is little to no chance it will remain in production for 2006-07.

Season to-date, both *ElimiDate* and *Blind Date* are shells of their former selves, with *Blind Date* at a mere 1.1 in households (down 8 percent year-to-year), and *ElimiDate* one-tenth of a rating point lower at a 1.0 (off by 9 percent from one year earlier). In demos, both strips are flat among men 18-34 (*Blind Date* at a 0.7 rating; *ElimiDate* a 0.6), and down 7 percent among adults 18-34 (each with a 0.7).

As always, the king of game, *Wheel of Fortune*, keeps chugging along as the top-rated show overall in households, with an 8.5 rating (down a typical 6 percent year-to-year). *Wheel* has now ranked as the No. 1 show overall and the No. 1 game show in syndication every year since it premiered in 1983.

Demographically, *Wheel* also has a lock in the genre at a 3.5 among women 25-54 (30 percent above No. 2 *Jeopardy*), and a 3.1 among key adults 25-54 (24 percent ahead of *Jeopardy*). Losses for *Jeopardy*, which has been the No. 2 game show for 22 straight years, are a result of the ongoing presence of former champion Ken Jennings last season, which gave the veteran game show a significant lift. Like corporate cousin *Wheel of Fortune*, expect the still-healthy *Jeopardy* to perform at current levels next season.

Elsewhere, the underrated *Who Wants to Be a Millionaire* (which is unlikely to suffer if or when a replacement for Vieira is named) ranks third in the genre in the three surveyed categories, with minor losses of 6 percent in households and between 6 percent and 8 percent in the two surveyed demos. *Family Feud* is performing closer to year-ago levels. Since *Feud*, like *Millionaire*, is more content-driven, there is no reason to believe that O'Hurley's arrival will affect the ratings one way or another next season. In the world of game, sometimes the host is secondary to the content.

Game

SHOW / SYNDICATOR	HH	W25-54	A25-54
WHEEL OF FORTUNE KING WORLD	8.5 (-6)	3.5 (-10)	3.1 (-5)
JEOPARDY KING WORLD	6.8 (-13)	2.7 (-16)	2.5 (-12)
WHO WANTS TO BE A MILLIONAIRE BUENA VISTA	3.2 (-6)	1.5 (-6)	1.2 (-8)
FAMILY FEUD TRIBUNE	2.0 (-5)	1.0 (NC)	0.8 (NC)

Relationship

SHOW / SYNDICATOR	HH	M18-34	A18-34
BLIND DATE NBC UNIVERSAL	1.1 (-8)	0.7 (NC)	0.7 (-7)
ELIMIDATE WARNER BROS.	1.0 (-9)	0.6 (NC)	0.7 (-7)

FIRST-RUN

Court

This fall will bring a new face to the bench of Twentieth Television's *Divorce Court*. Word is the forced departure of Judge Mablean Ephraim in favor of Lynn Toler (an attorney who served as an elected judge on the Cleveland Heights Municipal Court) on the long-running show was not as amicable as the syndicator would lead you to believe. But the bigger question for next season, of course, is whether there is room for two more court-related strips—Twentieth Television's *Cristina's Court* and Sony Pictures Television's *Judge Maria Lopez*. If history repeats itself, seven at present is enough; nine by next season may be too many.

Since ratings for *Divorce Court* have begun to trend downwards (off

7 percent in households, 13 percent in women 18-49 and 12 percent in women 25-54), the arrival of Toler (who already had a deal with the syndicator to preside over a court show) may just be the shot in the arm the veteran revival needs. Or it could backfire, similar to when Robin Givens took over for *Mother Love* in the middle of season two of the syndicator's talker *Forgive or Forget* in 2000. Given the recent trends in the marketplace, the likely scenario for *Divorce Court* is more minimal erosion in 2006-07 even with Judge Toler at the helm.

Mirroring the last decade, category leader *Judge Judy* from Paramount remains firmly perched at the top of the heap, with year-to-year losses of 4 percent in households, 13 percent in women 18-49 and 7 percent in women 25-54. *Judge Judy*, in fact, hit a milestone for the recent week of April 16 with its 500th consecutive genre win in households. Corporate cousin *Judge Joe Brown*, which had successfully ridden the time period coattails of *Judy* for eight years, has sprung a leak with erosion of 18 percent in women 18-49 (1.7 to 1.4), and 11 percent among women 25-54 (1.8 to 1.6).

People's Court and *Judge Mathis*, both from Warner Bros., and Sony Pictures TV's *Judge Hatchett* all are close to year-ago levels. Twentieth's *Judge Alex*, in its first season, ranks sixth overall in the genre in households with a 2.2—three-tenths of a rating point (or 16 percent) above last-place *Judge Hatchett*. Both strips are tied for the No. 6 spot among women 18-49 and women 25-54.

SHOW / SYNDICATOR	HH	W18-49	W25-54
JUDGE JUDY PARAMOUNT	4.8 (-4)	2.1 (-13)	2.6 (-7)
JUDGE JOE BROWN PARAMOUNT	3.1 (-9)	1.4 (-18)	1.6 (-11)
PEOPLE'S COURT WARNER BROS.	2.8 (+8)	1.4 (NC)	1.6 (NC)
DIVORCE COURT TWENTIETH TELEVISION	2.6 (-7)	1.4 (-13)	1.5 (-12)
JUDGE MATHIS WARNER BROS.	2.4 (-4)	1.4 (NC)	1.5 (NC)
JUDGE ALEX* TWENTIETH TELEVISION	2.2	1.0	1.1
JUDGE HATCHETT SONY PICTURES TELEVISION	1.9 (+6)	1.0 (NC)	1.1 (NC)

*NEW

FIRST-RUN

Magazine/Reality

Unlike its other first-run counterparts, which will add or lose product next season, the number of strips in the magazine/reality category should stay unchanged in 2006-07. For a genre with no erosion among the five national occupants, one wonders why new product is not on the horizon (since syndication, like other media, is a breeding ground for imitation). But the lack of overindulgence in the category is a refreshing change of pace. Only Twentieth Television has quietly tried to make inroads with the limited (and unsuccessful) launches of a new version of *A Current Affair*, and the current *Geraldo at Large*.

As always, Paramount veteran *Entertainment Tonight*, which has led the genre since July 15, 1996, stands head and shoulders above the rest. Comparatively, its strong ratings put it at an advantage over King World's *Inside Edition*—a hefty 49 percent in households, 57 percent in adults 18-49 and 69 percent among adults 25-54. *Inside Edition*, which has finished second in the genre for four straight years, was flat in households and the two surveyed demos, while season two of Paramount's critically improved *The Insider* netted gains of 8 percent in households and adults 25-54 (with no change among adults 18-49). Positioning *The Insider* as a companion piece

to *ET* has worked to Paramount's advantage, fitting like a glove.

Although NBC Universal's *Access Hollywood* and Warner Bros.' *Extra* (both consistent from one year earlier), rank fourth and fifth, respectively, in households, *Access* has managed to inch past *The Insider* for the No. 3 spot in adults 18-49. With a still healthy 2.3 in households, *Extra* is the highest rated cellar dweller in any first-run genre. That means that the national rate of success in magazine/reality is a flawless five for five. Expect more of the same next season.

Not included in our chart is Twentieth's limited launch of *Geraldo at Large*, which arrived in late October to replace the now-defunct *A Current Affair*. Based on the 40 metered markets it airs in, *Geraldo At Large* in April logged a so-so 2.3 rating/5 share. Comparatively, that's on par with the April 2005 time period average, but off a hefty 29 percent in rating and a share point off its lead-in average (3.2/6).

SHOW / SYNDICATOR	HH	A18-49	A25-54
ENTERTAINMENT TONIGHT PARAMOUNT	5.2 (NC)	2.2 (NC)	2.7 (NC)
INSIDE EDITION KING WORLD	3.5 (NC)	1.4 (NC)	1.6 (NC)
THE INSIDER PARAMOUNT	2.8 (+8)	1.1 (NC)	1.4 (+8)
ACCESS HOLLYWOOD NBC UNIVERSAL	2.6 (NC)	1.2 (NC)	1.4 (NC)
EXTRA WARNER BROS.	2.3 (NC)	1.1 (NC)	1.2 (NC)



NOT-SO-BIG MAC
Freshman sitcom *Bernie Mac*, with guest Isaac Hayes (left), isn't delivering supersized ratings.

OFF-NETWORK

Sitcoms

As the broadcast networks unveil their fall 2006 lineups this week, we come to the end of another season without a new breakout sitcom hit. Although there had been hope early in the season with NBC's *My Name Is Earl*, its move to Thursday was costly. Once again, the heavily populated off-network sitcom world will have to rely on its Big Three—King World's *Everybody Loves Raymond*, Sony Pictures Television's *Seinfeld*, and Warner Bros.' *Friends*. Despite their ongoing year-to-year erosion (as high as 15 percent among key adults 18-34 for *Raymond* and *Friends*), ratings for the three remain strong enough to anchor the entire genre for years into the future.

Only one current off-net occupant, Carsey Werner's *That '70s Show*, can compare to the aforementioned trio, and growth for the Fox comedy (which ends its network run this week) can be greatly attributed to its exposure on FX.

And only one other occupant, Sony's *King of Queens*, which heads the "second tier" of off-net sitcoms, has managed to show any growth from a year earlier. Other second-tierers include Twentieth Television's *King of the Hill*, which is down as much as 11 percent in its demos, and Twentieth's *Malcolm in the Middle*, which has declined by double digits.

Ratings for freshman strips *My Wife and Kids*, *The Bernie Mac Show* and late night-oriented *Sex and the City* are mediocre at best, while Carsey Werner weekly *Girls Behaving Badly* is behaving, well... badly with a 1.0 in households, and a mere 0.7 among target adults 18-34 and adults 18-49. Also disappointing is the late night-driven *South Park* from Debmear-Mercury, with a 1.5 in households, a 1.3 among adults 18-34, and a 1.0 among adults 18-49. Expect similar results next season for upcoming

arrivals *According to Jim* from Buena Vista Television (currently in collapse on ABC), *One on One* from Paramount, and Twentieth Television's *Still Standing*, which might find its future in syndication at risk if CBS does not grant it a fourth season. (A syndicated debut in conjunction with network exposure is often critical for the success of any off-net sitcom.)

As *Will & Grace* prepares to bid adieu on NBC, it does so on the heels of double-digit percent losses of between 31 percent and 33

percent in its off-network life. Also heavily down-trending are Buena Vista's *Home Improvement*; Paramount's *Becker*, *Frasier*, *The Parkers* and *Girlfriends*; Warner Bros.' *The Drew Carey Show*; and Sony's *Just Shoot Me*. At least Twentieth's *Yes, Dear* and Paramount's *Sabrina, the Teenage Witch* are performing close to 2004-05 levels.

Although CBS sitcom *Two and a Half Men* will not arrive until fall 2007, Warner Bros. is offering a broadband incentive. For the first time ever, the deal will include the chance to stream five episodes of the sitcom each week on their own Web sites, free to their viewers. Given the current state of the genre outside of the top tier, this could be an incentive worth offering for other upcoming arrivals. ■

SHOW / SYNDICATOR (CABLE EXPOSURE)	HH	A18-34	A18-49
EVERYBODY LOVES RAYMOND KING WORLD (TBS)	6.3 (-7)	3.0 (-15)	3.5 (-12)
SEINFELD SONY PICTURES TELEVISION (TBS)	5.5 (-7)	3.4 (-11)	3.6 (-8)
FRIENDS WARNER BROS. (TBS)	4.9 (-13)	3.5 (-15)	3.4 (-12)
THAT '70S SHOW CARSEY WERNER (FX)	4.1 (+32)	3.1 (+31)	2.9 (+30)
KING OF QUEENS SONY PICTURES TELEVISION	2.7 (NC)	1.7 (+3)	1.8 (NC)
KING OF THE HILL TWENTIETH TELEVISION (FX)	2.7 (-10)	1.9 (-7)	1.7 (-11)
MALCOLM IN THE MIDDLE TWENTIETH TELEVISION	2.7 (-18)	1.7 (-23)	1.6 (-18)
MY WIFE AND KIDS* BUENA VISTA	2.2	1.4	1.4
BERNIE MAC* TWENTIETH TELEVISION	2.2	1.4	1.4
SEX AND THE CITY* WARNER BROS. (TNT)	2.1	1.4	1.3
HOME IMPROVEMENT BUENA VISTA (TBS)	2.0 (-26)	1.1 (-27)	1.2 (-25)
WILL & GRACE WARNER BROS. (LIFETIME)	2.0 (-33)	1.4 (-31)	1.4 (-31)
YES, DEAR TWENTIETH TELEVISION (TBS)	1.7 (-6)	1.1 (-9)	1.1 (-5)
FRASIER PARAMOUNT	1.7 (-19)	0.8 (-24)	1.0 (-20)
SOUTH PARK* TRIBUNE/DEBMAR	1.5	1.3	1.0
BECKER PARAMOUNT	1.5 (-25)	0.7 (-18)	0.8 (-25)
DREW CAREY WARNER BROS. (TBS)	1.4 (-13)	0.9 (-14)	0.9 (-10)
GIRLFRIENDS PARAMOUNT (BET)	1.3 (-19)	0.8 (-17)	0.8 (-21)
GIRLS BEHAVING BADLY* SONY PICTURES TV (WEEKLY)	1.0	0.7	0.7
THE PARKERS PARAMOUNT (BET)	1.0 (-17)	0.6 (-21)	0.6 (-8)
JUST SHOOT ME SONY PICTURES TELEVISION	0.8 (-20)	0.5 (-9)	0.5 (-17)
SABRINA, THE TEENAGE WITCH PARAMOUNT	0.6 (-14)	0.4 (NC)	0.4 (NC)

* NEW