

# CableFAX Daily™

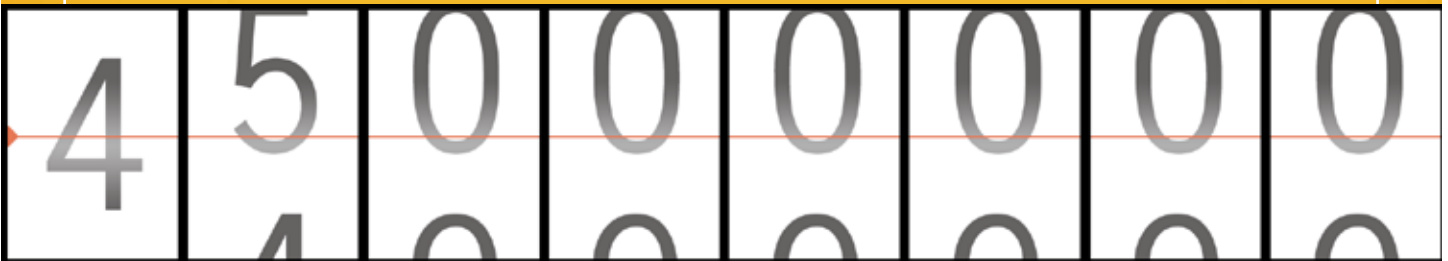
Monday — January 9, 2012

What the Industry Reads First

Volume 23 / No. 004

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What the Industry Reads First

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## YouTube 100: Cable's Complement or Competitor?

With YouTube's late October initiative to launch 100 original channels (*Cfax 11/1*), its TV-like interface redesign earlier this month and its popularity with younger audiences, the Internet video giant is looking more and more like cable's competitor. But the platform's content providers vying for both cable and Internet audiences say the new material is a separate thing entirely—in terms of length of the videos, but also content. Take **Vice Media**, which plans to roll out 2 YouTube channels—one featuring short-form videos on current events and the other to air just music videos. According to co-founder *Shane Smith*, YouTube has cast a wide net with the intention of weeding out the hits. "I think it's no secret that [YouTube is] sort of taking a shotgun approach. They're hoping that out of 100, 5 will hit. And if those 5 are Internet successes, they will turn the jets on those. We're hoping to be 1 or 2 of those 5." (YouTube was unavailable to comment on this story.) The Vice crew is currently shooting a news show for **HBO** aimed at young people, a sort of "60 Minutes' meets 'Jackass,'" with *Bill Maher* exec producing. The content made specifically for YouTube will be shorter, probably around 10-12 minutes a day, *Shane* said. Its upcoming cable presence, on the other hand, is generally "for people who still consume their media on linear formats... more mini-doc format, very edited." One YouTube partner that has migrated from Internet sensation to linear TV is *Cenk Uygur's* liberal-leaning Internet news program, "The Young Turks." Uygur landed a weekly spot on **Current TV** (premiered Dec 5) to complement its web presence (*Cfax, 9/21*), which recently surpassed 600m YouTube views. The new channel, called "The Young Turks: Town Hall," will include panel discussions with newsmakers and Internet commentators. The point is not to be different than or similar to the current iteration of "The Young Turks," said Uygur, but to be complementary. "The old school way of thinking about it is that... shows compete with one another. I think that's so outdated and antiquated. The new media model is, all these shows build on top of one another and each one finds a new audience and brings it into the fold." Similarly, online retailer **Karmaloop**, which caters to a younger, urban-dwelling crowd, is launching both a cable net and a YouTube channel. But the Internet content, said CEO *Greg Selkoe*, will be "more punchy, with quick, 5-12 minute reels." Though he sees the set-top box as the center of their universe, "there's lots of different media platforms and we're not going to restrict ourselves." What do the traditional networks think of all this? Several nets declined to speculate, but there is a general consensus that online viewing is complementary. But as *Cole-*

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**Deadline: January 20, 2012**

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- Advertising Campaign for a Network
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- Community Relations
- Direct Response Marketing
- NEW:** Faith-Based Marketing
- Integrated Marketing Campaign
- Marketing Campaign
- Marketing of a New Series or Show

- Marketing of a Continuing Series
- Marketing of a Special or Documentary/Documentary Series
- Media Event
- Media Relations Campaign
- Mobile Marketing Campaign
- Multicultural Marketing
- Press Kit
- Programming Stunt
- PR Stunt
- Public Affairs Campaign

- NEW:** Social Media During a Program
- Social Media Marketing
- NEW:** Sweepstakes and Games Marketing
- NEW:** Technology Vendor Marketing (Consumer)
- NEW:** Technology Vendor Marketing (B2B)
- Trade Show Marketing/PR
- Tchotchkey
- Video: use of video or moving image

- Viral Marketing Campaign
- NEW:** Youth Marketing

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- PR Executive of the Year, VP Level and above
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The awards are presented by the most trusted information source in cable: CableFAX Daily and sister brand CableFAX: The Magazine.

Questions? Contact Awards Coordinator Mary-Lou French at [mfrench@accessintel.com](mailto:mfrench@accessintel.com).  
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*man Breland*, COO of **Turner Network Sales**, told us, “anything that has a screen is a certain degree of competition.” At the end of the day what keeps viewers coming back repeatedly is consistent brand experiences and breakthrough shows delivered by networks. And producing a hit show isn’t easy. “I’m not surprised with YouTube or anyone saying, ‘hey I want to get in the content side of the business...’ And they have tremendous reach with YouTube,” Breland said. But “the original business is hard. You’ve got to have a pretty good platform to build a big audience, you’ve got to find a story that’s compelling.” (For more on this story, see **CableFAX.com**.)

**TCA Notebook:** NBCU Ent chmn *Robert Greenblatt* didn’t mince words when assessing the broadcast net’s situation (“We had a really bad fall”), but he said new owner **Comcast** bodes well for its future. “The good news is the fact that we do in fact have new owners,” he said. “They want us to succeed, and they’re willing to do anything to make that happen.” Greenblatt repeatedly praised the cable model throughout his exec session at **TCA**, saying he’ll employ some cable marketing tactics but noting a much higher ratings bar in the broadcast world. “If I were at **Showtime**, you’d be calling me a genius for delivering one or two good shows,” he said, later adding that “you can program a show for 18-year-old twins and get a hit show on a cable network.” He lamented that he had to cancel drama “Prime Suspect,” and pondered whether the show was too cable-like for a broadcast audience. “Was that too cable?” he asked. “I don’t know. It’s hard to know.” He said Comcast’s intersecting assets should help NBC forge a stronger line-up, with benefits ranging from access to sports rights to retaining talent. Greenblatt noted, for example, *Ryan Seacrest’s* entrenched presence on **E!** and how that could translate to a stronger relationship with NBC. In any event, Greenblatt acknowledged that NBC likely will need to spend more money than other broadcast nets to pull itself out of last place, and he said retrans fees will continue to help fund such higher spending. “I think retrans is vital to the long-term viability of any of the broadcast networks,” he said.

**At the Portals:** The **FCC** Media Bureau released its congressionally-mandated report on RSN access and carriage issues, basically summing up comments on RSNs and changes in the marketplace since its ’06 **Adelphia** order. The Adelphia order approving **Time Warner Cable** and **Comcast’s** purchase of the MSO included RSN conditions such as the right to invoke arbitration and the ability to continue carrying an affiliated RSN during an impasse with the 2 MSOs. Unless the FCC acts, TWC will no longer be subject to the conditions as of July 13. The conditions for Comcast have been superseded by conditions adopted in the Comcast-NBCU order, which generally remain in effect until Jan 20, ’18.

**Cablevision:** **BTIG’s** *Rich Greenfield* published a lengthy analyst note on “What Really Happened in Bethpage,” citing anonymous sources within and outside **Cablevision**. Greenfield said he asked CVC’s PR team to verbally fact-check his timeline of events, but they declined. Cablevision declined comment on Fri. The gist of Greenfield’s note: the *Dolan* family was extremely dissatisfied with CVC’s performance relative to its peers; *Kristin Dolan* (wife of Jim Dolan and a CVC svp since ’03) was promoted to a new marketing role, with Greenfield believing there were substantive differences between her and evp, marketing *John Hargis* on how to market products (Hargis was picked for job by cable div head *John Bickham*); Greenfield believes she was reporting directly to Bickham; the analyst said Jim Dolan blocked Bickham’s proposed budget and essentially forced him out; following Bickham’s departure in Nov, all of Tom Rutledge’s direct reports began reporting directly to Jim Dolan (leaving him only direct reports from **Newsday**, **News 12** and **MSG Varsity**); the reporting structure was a violation of Rutledge’s contract, allowing him to leave “free and clear with his \$15mln retirement benefit.”

**Sales Calls:** **Turner** realigned its ad sales div to better integrate operating functions, with *Greg D’Alba* elevated to pres, news and Turner Digital Ad Sales and *Donna Speciale* joining the company as pres, Turner Ent and Animation Ad Sales. *Michael Salerno* was upped to evp, strategic planning and ops and adds ad sales ops to purview, and pres, sales, distribution and sports *David Levy* is on the hunt for a new evp, sales promotions and marketing. *Walker Jacobs* now reports to D’Alba as evp, digital ad sales, as does *Katrina Cukaj* who was upped to evp, **CNN** ad sales. Reporting to Speciale are vp, Turner Ent ad sales *Frank Sgrizzi* and evp, **truTV**, **Cartoon Net** and **Adult Swim** ad sales *Joe Hogan*.

**Ratings:** **MTV’s** “Jersey Shore” Season 5 debut still brought big numbers Thurs, just not as big as Seasons 3 & 4. The series debuted with 7.6mln total viewers, vs 8.8mln for Season’s 4 premiere and 8.45mln for Season 3. Among 12-34s, the Thurs premiere notched a 7.2 rating, making it the #2 series telecast of the season across all TV among that demo.

**Oops:** That was *Chuck*, not *Jim*, *Dolan’s* quote on *David Wicks’* contributions to **Cablevision** and the industry (**Cfax**, 01/06).

**CableFAX Week in Review**

Company	Ticker	1/06 Close	1-Week % Chg	YTD %Chg
<b>BROADCASTERS/DBS/MMDS</b>				
DIRECTV:	DTV	43.85	2.36%	2.55%
DISH:	DISH	28.74	1.13%	0.91%
DISNEY:	DIS	39.91	5.83%	6.43%
GE:	GE	18.65	9.64%	4.13%
NEWS CORP:	NWS	18.60	2.14%	2.31%
<b>MSOS</b>				
CABLEVISION:	CVC	14.85	3.85%	4.43%
CHARTER:	CHTR	56.62	(0.46%)	(0.56%)
COMCAST:	CMCSA	24.68	3.59%	4.11%
COMCAST SPCL:	CMCSK	24.30	4.97%	3.14%
GCI:	GNCMA	9.55	(9.56%)	(2.45%)
KNOLOGY:	KNOL	14.37	1.13%	1.20%
LIBERTY GLOBAL:	LBTYA	42.21	3.13%	2.88%
LIBERTY INT:	LINTA	16.85	3.69%	3.88%
SHAW COMM:	SJR	19.84	4.26%	2.43%
TIME WARNER CABLE:	TWC	64.03	1.54%	0.72%
VIRGIN MEDIA:	VMED	21.93	2.76%	2.57%
WASH POST:	WPO	376.67	(0.75%)	(0.04%)
<b>PROGRAMMING</b>				
AMC NETWORKS:	AMCX	38.30	2.79%	1.92%
CBS:	CBS	27.79	2.02%	2.39%
CROWN:	CRWN	1.25	7.76%	3.31%
DISCOVERY:	DISCA	41.29	0.71%	0.78%
GRUPO TELEVISIA:	TV	21.27	1.43%	1.00%
HSN:	HSNI	35.56	(3.97%)	(1.93%)
INTERACTIVE CORP:	IACI	41.95	(1.46%)	(1.53%)
LIONSGATE:	LGF	8.41	4.34%	1.08%
LODGENET:	LNET	2.67	13.14%	11.72%
NEW FRONTIER:	NOOF	1.04	(6.31%)	0.97%
OUTDOOR:	OUTD	6.98	(3.32%)	(6.43%)
SCRIPPS INT:	SNI	43.62	1.82%	2.83%
TIME WARNER:	TWX	36.55	0.47%	1.13%
VALUEVISION:	VVTV	1.60	(18.37%)	(14.89%)
VIACOM:	VIA	54.44	3.46%	2.08%
WWE:	WWE	9.64	3.32%	3.43%
<b>TECHNOLOGY</b>				
ADDVANTAGE:	AEY	2.13	2.15%	1.67%
ALCATEL LUCENT:	ALU	1.56	1.30%	0.00%
AMDOCS:	DOX	28.60	0.74%	0.25%
AMPHENOL:	APH	46.23	0.85%	1.85%
AOL:	AOL	15.83	4.90%	4.83%
APPLE:	AAPL	422.40	4.27%	4.30%
ARRIS GROUP:	ARRS	10.69	(1.11%)	(1.2%)
AVID TECH:	AVID	8.91	3.24%	4.45%
BLNDER TONGUE:	BDR	1.30	(45.15%)	6.56%
BROADCOM:	BRCM	30.14	2.36%	2.64%
CISCO:	CSCO	18.85	3.29%	4.26%
CLEARWIRE:	CLWR	1.88	(2.08%)	(3.09%)
CONCURRENT:	CCUR	3.55	7.90%	(6.33%)
CONVERGYS:	CVG	12.59	(1.64%)	(1.41%)
CSG SYSTEMS:	CSGS	14.89	2.20%	1.22%
ECHOSTAR:	SATS	21.47	1.42%	2.53%
GOOGLE:	GOOG	650.02	1.19%	0.64%
HARMONIC:	HLIT	5.13	0.00%	1.79%

Company	Ticker	1/06 Close	1-Week % Chg	YTD %Chg
INTEL:	INTC	25.25	2.85%	4.12%
JDSU:	JDSU	11.12	5.80%	6.51%
LEVEL 3:	LVLTL	17.96	7.03%	5.71%
MICROSOFT:	MSFT	28.11	8.10%	8.26%
MOTOROLA MOBILITY:	MMI	38.46	(0.88%)	(0.88%)
RENTRAK:	RENT	14.50	6.15%	1.54%
SEACHANGE:	SEAC	6.75	(3.98%)	(3.98%)
SONY:	SNE	17.44	(1.36%)	(3.33%)
SPRINT NEXTEL:	S	2.19	(5.19%)	(6.41%)
THOMAS & BETTS:	TNB	54.46	(1.11%)	(0.26%)
TIVO:	TIVO	10.20	13.71%	13.71%
UNIVERSAL ELEC:	UEIC	16.51	(0.6%)	(2.13%)
VONAGE:	VG	2.39	(7.36%)	(2.45%)
YAHOO:	YHOO	15.52	(3.81%)	(3.81%)
<b>TELCOS</b>				
AT&T:	T	29.68	(1.62%)	(1.85%)
VERIZON:	VZ	38.33	(4.29%)	(4.46%)
<b>MARKET INDICES</b>				
DOW:	DJI	12359.92	0.59%	1.17%
NASDAQ:	IXIC	2674.22	2.31%	2.65%
S&P 500:	GSPC	1277.81	1.17%	1.61%

**WINNERS & LOSERS**

**THIS WEEK'S STOCK PRICE WINNERS**

COMPANY	CLOSE	1-WK CH
1. TIVO:	10.20	13.71%
2. LODGENET:	2.67	13.14%
3. GE:	18.65	9.64%
4. MICROSOFT:	28.11	8.10%
5. CONCURRENT:	3.55	7.90%

**THIS WEEK'S STOCK PRICE LOSERS**

COMPANY	CLOSE	1-WK CH
1. BLNDER TONGUE:	1.30	(45.15%)
2. VALUEVISION:	1.60	(18.37%)
3. GCI:	9.55	(9.56%)
4. VONAGE:	2.39	(7.36%)
5. NEW FRONTIER:	1.04	(6.31%)



**Sales Executive of the Year Awards**  
saluting cable sales leadership

**Questions:** Mary Lou French  
at 301-354-1851;  
mfrench@accessintel.com

**Saluting Sales Excellence in the Cable Marketplace**

The CableFAX Sales Executive of the Year Awards recognizes sales forces across cable who work tirelessly behind the scenes to drive revenue and keep our dynamic marketplace growing and business moving forward. The winners and honorable mentions will be saluted during an awards event in Spring 2012 in NYC.

**Entry Deadline:** February 3, 2012  
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