

CableFAX Daily™

Tuesday — January 22, 2013

What the Industry Reads First

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TVE Check-in: Turner's Legg Talks About What's to Come

As cable continues to make TV Everywhere strides, we checked in with TVE guru *Jeremy Legg*, Turner's svp, business development and multi-platform distribution. "TV Everywhere has really moved from being a project to just the way business is done," he said. He weighed in on where he thinks TVE is headed this year and what needs to be done. **The Olympics is widely viewed as a watershed moment for TV Everywhere. What's next for the tech?** I think the next set of things that are important are the other announcements that have been made in the industry. Scripps and Viacom entering the market with authentication... because it has largely been us and Disney that up until now have been authenticating for an extended period of time. That leaves us with a smaller group of programmers that haven't yet entered TV Everywhere. TV Everywhere has always been about critical mass. I think the addition of those programmers into the fold is essential. Some of us will be on the 10 yard line, some of us will be on the 50 yard line. But everyone will be on the playing field at that point. Once everyone is participating, you can then start communicating to consumers in a more coherent way—here's how much content is going to be up at any one time and when it's going to be available; here's what networks are going to be simulcasted, and here's which networks are going to focus on VOD. You can then at more scale roll out the technology enhancements that Comcast did for the Olympics, like modem-based authentication, where a double-play consumer doesn't have to know their credentials to authenticate their device in the home. Those are the big next steps in the journey of TV Everywhere. **Will sports be a big driver for TVE?** Absolutely. It's very high profile. It draws fans to watch their teams, and they will make the effort to find the content. The thing about sports is that it's obviously events based. Events like March Madness or the Olympics don't occur every week. What we have to figure out is between the spikes of these big sporting events, how do you then make sure that TV Everywhere is consistent for other types of content—general entertainment, broadcast content, cable content, etc... **Do we need more consumer education?** I think they [understand TVE] on a limited basis because of sports... But because not enough programmers have been authenticating their content, it's been inconsistent to date. If I'm a consumer I'm going to look at it and say I have an expanded basic package of networks. I understand what that offer is. I turn on my television, and it's there. I access VOD, and it's there. But when I go to the Internet, it's not consistent yet because not



Entries Deadline: March 1, 2013

The CableFAXIES awards

The CableFAXIES Awards salute the year's most outstanding communications initiatives and programs in the highly competitive and dynamic Cable arena. The coveted awards set the industry benchmark for excellence across all areas of PR and Marketing. The winners and honorable mentions will be saluted during at an awards event in May 2013 in NYC.

Go to www.cablefax.com/cfp/awards/cablefaxies2013 for more details.

We look forward to seeing your entry and saluting cable's best PR & marketing efforts of the year.

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CableFAX Calendar - Upcoming in 2013

CableFAX serves the cable community with a variety of services and programs to help you stay abreast of the complex dynamics facing cable executives, as well as opportunities to stay in the know among your peers and colleagues. From our premier publications, including *CableFAX Daily* and *CableFAX: The Magazine* to our Award Programs and Webinars, you get many opportunities to learn, network and honor the best people and programs in cable throughout the year.

FEBRUARY

Feb 4: CableFAX Daily Special Report: Black History Programming

Feb 15: CableFAX's Sales Executive of the Year Awards Deadline

MARCH

Mar 1: CableFAXIES Awards Deadline

Mar 7: Webinar: Rewards Marketing

Mar 14: Executive Roundtable on Retransmissions, Washington, D.C.

Mar 15: CableFAX 100 Nomination Deadline

Mar 21: CableFAX Digital Hot List/Best of Web Awards Luncheon, NYC

Mar 21: CableFAX Daily Special Report: Digital Hot List/Best of Web Awards Winners Issue

MAY

May 9: FAXIES/SEYO Luncheon in NYC

CableFAX Daily Special Report: Cable FAXIES/SEYO Awards Winners Issue

JUNE

CableFAX: The Magazine – CableFAX 100

Jun 3: CableFAX Daily Special Report: Lifestyle Programming

Jun 9-12: CableFAX Daily NCTA Special Issues from The Cable Show, Washington, D.C.

Jun 10: CableFAX Leadership Roundtable Breakfast, with CableFAX 100 Honorees, Washington D.C.

JULY

CableFAX: The Magazine – Top Ops Issue

Jul 1: Program Awards & Top Places to Work Deadline

Jul 23: Webinar: Cable and the Digital Horizon

Jul 29: CableFAX Daily Independent Show Special Issue

SEPTEMBER

CableFAX: The Magazine – Diversity Issue

Sept 10: CableFAX Executive One-Day Summit – The Multi-Platform World

Sept 11: CableFAX Program Awards/Top Ops/ Best Places to Work Event, with Special Issue

Sept 24: Webinar (Topic TBD)

CableFAX Daily Special Report: WICT

OCTOBER

CableFAX: The Magazine – Most Powerful Women in Cable Issue

Oct 10: CableFAX Leadership Roundtable

NOVEMBER

CableFAX Daily Special Report: Holiday Programming

Nov 12: Webinar (Topic TBD)

Nov 13: Most Powerful Women in Cable Breakfast, NYC

Nov 13: CableFAX Women's Leadership Roundtable, NYC

DECEMBER

Dec 6: Best of the Web Awards Deadline

CableFAX Daily Special Report: The Year Ahead

Advertising/Sponsorship Opportunities:

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everybody is doing it. Once you're more or less completing that expanded basic package on the Internet, you can go to consumers and market it in a consistent way. That's just been hard to do to date.

Lance & Oprah: OWN did get a big audience for *Oprah's* exclusive sit-down with *Lance Armstrong* Thurs night, but the 3.2mln viewers failed to top the 3.5mln OWN drew for *Whitney Houston's* family last March. The special earned another 1.1mln in its 2nd airing at 10:30pm. These numbers don't factor in the online viewers (OWN reports more than 600K live streams) or DVR views. A drop off is likely for Part 2 on Fri at 9pm. Not surprisingly, the interview was OWN's highest ranked telecast ever among male demos (1.88 for men 25-54; 1.59 for men 18-49). The big question: Will some of these viewers stick around with OWN teasing upcoming shows, including an upcoming "Oprah's Master Class" about *Tom Brokaw*.

Ad Outlook: Magna Global reduced its '13 forecast for total normalized media spending (excludes political & Olympics) to +1% from +1.3%. And that's assuming that next month's debt ceiling discussion is successful, and the economy's prospects stay on track. National TV is the category that was revised most significantly, with the media firm dropping growth to +2.1% from its +4.8% forecast in Oct. "Since the beginning of the broadcast season in September, the scatter market prices have showed very little 'premium' over the upfront CPM inflation despite the fact that primetime ratings have been weaker than expected (-5% for broadcast networks, -2% for cable networks, on adults 18-49, including sports) and broadcasters had to serve extra spots to meet their guaranteed impact," Magna Global said. It sees English-speaking national nets impacted the most (-6.4%), but national cable should continue to benefit from better ratings and market share gains, with Magna forecasting 4% growth. For '12, US core media ad rev grew 4.7% to \$153.4bln, the firm said. Exclude Olympics and political, and that growth rate drops to +2.7%. Magna said national cable grew by 5.1% last year to \$23.1bln.

At the Portals: Call FCC chmn *Julius Genachowski* the Gigabits chmn. In a meeting with the **US Conference of Mayors** Fri, he proposed establishing gigabit communities to accelerate the creation of "a critical mass of markets and innovation hubs with ultra-fast Internet speeds." He envisioned services and applications like online video calls, movies, and immersive educational experiences enabled by gigabit speeds, and he noted that some 42 communities in 14 states are served by ultra-high-speed fiber Internet providers. Genachowski proposed a new online clearinghouse of best practices to collect and spread info about how to lower the costs and increase the speed of broadband deployments. Part of the plan is to collaborate with the US Conference of Mayors on the best-practices clearinghouse effort. The chmn also announced the agency will hold workshops on gigabit communities. -- **DISH** wants the **FCC** to put the brakes on its review of the **Sprint/Softbank** transaction, citing the pending bidding war between Sprint and itself for **Clearwire** and arguing that a premature review "could undermine the commission's policy objective of neutrality in takeover contests by giving Softbank and Sprint a very real advantage in the corporate valuation process," DISH said in a filing at the FCC.

In the Courts: The **FCC** enlisted some ex-FCCers to its fight against **Verizon** in the net neutrality case. In a brief filed at the DC Circuit, the court that's reviewing Verizon's challenge of the FCC's net neutrality order, *Reed Hundt*, *Michael Copps*, *Tyrone Brown* and *Nicholas Johnson* (all Dems, natch) urged the court to reject Verizon's constitutional claims. "The FCC's rules do not implicate, let alone abridge, any 'free speech' right of Verizon's" the brief said. "Verizon's arguments fail as a matter of constitutional principle." The court is expected to rule on the case later this year.

NBA Passes: In Demand announced that it's offering a week-long, free preview of NBA League Pass starting Mon for digital cable subs. The half-season package price, including digital and mobile options, is \$99, or 4 installments of \$24.75. The pass also includes access to authenticated content across platforms. Among the cable MSOs offering the package this year are: **Comcast**, **Time Warner Cable**, **Cablevision**, **Cox**, **Bright House** and **Verizon FiOS**, plus a number of independent affils.

People: Former **Canoe** and **Comcaster** *Vicki Lins* has joined **Clear Channel Outdoor**, where she is EVP and CMO for N America. Another familiar cable face, *David Grabert*, is working as vp, marketing and communications. -- **HGTV** and **DIY** announced a development team within the brands' unified programming dept. Led by *Steven Lerner*, vp of programming, and *Courtney White*, vp of program development and production, the new HGTV and DIY Network Development Team is responsible for facilitating original programming ideas, identifying on-air talent and developing multiplatform programs to accompany a total of 1300 hours of programming now available across both networks.

Editor's Note: Your next issue of **CableFAX Daily** will arrive Tues evening because of the MLK holiday.

CableFAX Week in Review

Company	Ticker	1/18 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
DIRECTV:	DTV	53.36	1.83%	6.38%
DISH:	DISH	37.92	4.72%	4.18%
DISNEY:	DIS	52.34	3.48%	5.12%
GE:	GE	22.04	3.96%	5.00%
NEWS CORP:	NWS	27.83	1.46%	6.06%
MSOS				
CABLEVISION:	CVC	15.33	(0.39%)	2.61%
CHARTER:	CHTR	78.83	0.56%	3.40%
COMCAST:	CMCSA	40.27	4.69%	7.78%
COMCAST SPCL:	CMCSK	38.67	4.63%	7.66%
GCI:	GNCMA	8.65	(4.84%)	(9.8%)
LIBERTY GLOBAL:	LBTYA	69.43	2.86%	10.28%
LIBERTY INT:	LINTA	20.98	(0.33%)	6.61%
SHAW COMM:	SJR	23.71	1.89%	3.18%
TIME WARNER CABLE:	TWC	100.54	2.72%	3.45%
VIRGIN MEDIA:	VMED	38.57	2.77%	4.95%
WASH POST:	WPO	380.17	1.15%	4.10%

PROGRAMMING				
AMC NETWORKS:	AMCX	56.11	5.47%	13.35%
CBS:	CBS	40.42	4.80%	6.23%
CROWN:	CRWN	1.95	(1.52%)	5.41%
DISCOVERY:	DISCA	67.72	(0.65%)	6.68%
GRUPO TELEVISIA:	TV	27.95	0.87%	5.15%
HSN:	HSNI	59.03	1.53%	7.17%
INTERACTIVE CORP:	IACI	41.71	(3.87%)	(11.71%)
LIONSGATE:	LGF	18.14	1.85%	10.61%
OUTDOOR:	OUTD	7.49	(0.93%)	(1.45%)
SCRIPPS INT:	SNI	59.02	(1.35%)	1.90%
TIME WARNER:	TWX	49.93	0.65%	4.39%
VALUEVISION:	VTV	2.40	5.73%	33.33%
VIACOM:	VIA	60.26	0.30%	11.04%
WWE:	WWE	8.25	1.98%	4.56%

TECHNOLOGY				
ADDVANTAGE:	AEY	2.28	10.31%	14.74%
ALCATEL LUCENT:	ALU	1.65	2.48%	18.71%
AMDOCS:	DOX	35.03	(0.96%)	3.06%
AMPHENOL:	APH	67.57	(1.17%)	4.44%
AOL:	AOL	29.75	(0.23%)	0.47%
APPLE:	AAPL	500.00	(3.9%)	(6.05%)
ARRIS GROUP:	ARRS	16.84	9.71%	12.72%
AVID TECH:	AVID	7.49	(0.79%)	(1.19%)
BLNDER TONGUE:	BDR	1.28	19.96%	11.62%
BROADCOM:	BRCM	34.81	(0.01%)	4.83%
CISCO:	CSCO	21.02	2.61%	6.95%
CLEARWIRE:	CLWR	3.17	0.63%	9.69%
CONCURRENT:	CCUR	6.02	(3.37%)	4.88%
CONVERGYS:	CVG	16.85	(0.65%)	2.68%
CSG SYSTEMS:	CSGS	19.05	(1.6%)	4.79%
ECHOSTAR:	SATS	35.59	3.13%	4.00%
GOOGLE:	GOOG	704.51	(4.79%)	(0.41%)
HARMONIC:	HLIT	5.23	2.75%	3.16%
INTEL:	INTC	21.25	(3.41%)	3.06%
JDSU:	JDSU	13.20	(0.15%)	(2.22%)
LEVEL 3:	LVT	23.69	(4.01%)	2.51%

Company	Ticker	1/18 Close	1-Week % Chg	YTD %Chg
MICROSOFT:	MSFT	27.25	1.57%	2.02%
RENTRAK:	RENT	19.99	(0.05%)	2.57%
SEACHANGE:	SEAC	10.77	1.80%	11.38%
SONY:	SNE	12.70	14.52%	13.39%
SPRINT NEXTEL:	S	5.65	(4.56%)	(0.35%)
TIVO:	TIVO	12.07	(1.15%)	(1.95%)
UNIVERSAL ELEC:	UEIC	18.89	0.16%	(2.38%)
VONAGE:	VG	2.49	2.47%	5.06%
YAHOO:	YHOO	20.02	3.78%	0.60%

TELCOS				
AT&T:	T	33.44	(2.42%)	(0.8%)
VERIZON:	VZ	42.54	(1.76%)	(1.69%)

MARKET INDICES				
DOW:	DJI	13649.70	1.20%	4.16%
NASDAQ:	IXIC	3134.71	0.29%	3.82%
S&P 500:	GSPC	1485.98	0.95%	4.19%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. BLNDER TONGUE:	1.28	19.96%
2. SONY:	12.70	14.52%
3. ADDVANTAGE:	2.28	10.31%
4. ARRIS GROUP:	16.84	9.71%
5. VALUEVISION:	2.40	5.73%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. GCI:	8.65	(4.84%)
2. GOOGLE:	704.51	(4.79%)
3. SPRINT NEXTEL:	5.65	(4.56%)
4. LEVEL 3:	23.69	(4.01%)
5. APPLE:	500.00	(3.9%)

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