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Tuesday — January 24, 2012

What the Industry Reads First

Volume 23 / No. 014

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Keeping it Real: What Makes Reality TV Tick

Reality TV is sometimes criticized for being formulaic and repetitive. After all, how many pawn and cupcake shows do people really need? But the pros told a **NATPE** audience Mon that it's tougher than you think. **Thom Beers**, **Original Productions** CEO and exec prod, has a string of hits—from **History's** "Ice Road Truckers" to **A&E's** "Storage Wars." What he doesn't have is "Pawn Stars." "I went to Vegas twice in 3 years trying to crack that. I walked away and said, 'it's too depressing.' You cracked that, and it pissed me off," Beers told fellow NATPE panelist **Brent Montgomery**, owner of **Leftfield Pictures** and exec prod of the hit pawn show. "He turned it around... [and made it about] a treasure hunt. I never saw that. I always saw the guys at 2 in the morning selling their wedding rings because they wanted to keep gambling. You turned it into aspiration." Montgomery said that was because he went into the series with that mindset, having already heard the idea was too seedy. "We tried to make it more the Disney version," he said. **Jonathan Murray**, chmn of "Real World" producer **Bunim-Murray**, is a vet who has seen the genre change over the years. "It's moved away from things that feel contrived. That's why family shows work so well. Those people are sort of stuck together," he said. Beers said he doesn't look for a specific subculture, but instead men with jobs of high risk and reward in exotic locations. "[Men] like to watch reality programs with a score. How many crabs were caught... who's winning," he said. There seemed to be less certainty on what women like—although drama was mentioned. **APA** head of alternative & intl TV **Hayden Meyer** talked about how **Animal Planet's** "American Stuffers" skews male, but has a large female audience because they like the story of real people and their relationships with their pets. **truTV** COO **Marc Juris** said his net finds that younger women (in their 30s) like the same programming as older men. For tru, he wants reality shows with character, conflict, consequence and comic relief. It's the humor that Juris feels differentiates his net from History and **Discovery**, and has resulted in the launch of "Impractical Jokers" (outrageous stunts caught by hidden cameras). At one point, it sounded like even the reality experts were amazed at what hits. "It's still the same show it was 9 years ago," Beers said of "Deadliest Catch." "Bait the trap and drop it in the water. Do it again and again. There is a crab or there isn't a crab." Montgomery jumped in, saying Beers & Co have been very smart in the quality of that show, although he later joked that he couldn't believe Beers sold a show about beards ("Whisker Wars" on **IFC**). One trend in reality programming is franchising. In addition to all of **Bravo's** "Real Housewives" series, **A&E** recently debuted "Storage Wars Texas." Pawn Stars franchised in Jan with "Cajun Pawn Stars," which was the 3rd highest series in premiere in History's history. It might just seem like franchising is another way to cash in, but Beers painted it differently. "The only reason I made [Storage Wars TX] is because the people in L.A. [for the original series] were turning into [expletive]," he said. "They were making it impossible to make the show and asking for so much money."

Football Fumbles: If you want to find out how much people hate their cable company, try interrupting live play of the **NFC** championship several times with commercials. That's just what happened Sun night in the DC area, with **Comcast** Xfinity TV ads cutting in at least 3 times (including once in overtime). **Twitter** blew up. Local media went crazy. And nearly



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everyone jumped to the conclusion that Comcast was to blame. Problem is, the MSO says it wasn't its fault. A Comcast spokesperson pointed to local **Fox** affil **WTTG**, saying the station is continuing to investigate, but "believes it was due to an equipment failure at the station." Calls to **WTTG** weren't returned by deadline. It wasn't just any commercial that interrupted the Giants-49ers game, but a Comcast spot that focused on welcoming back a **FiOS** customer, rubbing salt in the wounds of those who thought Comcast was the culprit. To give you an idea of the snafu's magnitude, Sun night's game scored an average audience of 57.6mln, the 3rd most watched conference championship game ever. "We know some DC-area viewers missed portions of last night's NFC Championship game due to additional ads inserted locally, and we sympathize with their frustrations," the Comcast rep said. An anchor for DC news radio station **WTOP** summed up the night by saying he thought it was going to be a "Heidi 2"—a reference to the infamous 1968 come-from-behind Raiders victory over the Jets from which NBC cut away early to air the TV film "Heidi." -- Comcast wasn't the only MVPD with hiccups during the NFC championship. "FOX just gone blackout while the biggest possessions of the game is happening," *LeBron James* tweeted. Moments later, **DirectTV** told Miami viewers via Twitter that it was aware of the loss of audio and video in their area for local channels and that the bcst center was working on it. (Recall, that Miami could have lost out on the game completely since **WSVN** is blacked out on DirecTV due to a retrans spat, but owner **Sunbeam** decided to allow the op to show it). DirecTV said a local fiber carrier was doing maintenance on transmission lines, causing an outage that affected all HD signals in the market "When the HD channels went down, we immediately put a slide on the affected channels directing customers to the standard-def channels so they could continue watching the game and other programming," a DirecTV spokesman said Mon. "The HD was back up this morning. We're working with the local carrier to make sure this doesn't happen again."

Retrans: No deal yet between **DirectTV** and **Sunbeam**, but it's clear DirecTV expects the broadcaster to offer up the Super Bowl if an agreement isn't signed by then. DirecTV issued a statement Sun night congratulating the New England Patriots on its AFC championship. "Since Sunbeam TV returned the FOX NFL playoff game to Miami fans today, we look forward to also watching with all of our New England customers as the Patriots play for the NFL championship in Super Bowl XLVI on NBC on February 5," said DirecTV, which also has lost the **NBC** Boston affil in Pats' Country. On Mon, Sen *Scott Brown* (R-MA) sent a letter to DirecTV and Sunbeam, asking that the Boston NBC and CW stations be restored while negotiations continue.

Targeted Fox: **Fox Intl Channels** and Colombia-based **RCN TV Group** formed a jv to launch **MundoFox**, a Spanish-language broadcast net targeting the US Hispanic market slated to launch this fall. No deals have been finalized yet, but the goal is to cover 75% of US homes. Content for MundoFox will come from parties including RCN, which currently services many US Hispanic nets, and its **NTN24** channel, **Fox Deportes** and **Shine Group**. "...it would be a missed opportunity not to provide an alternative for the 50+ million Latino viewers who currently have limited options in Spanish-language broadcast television," said FIC pres/CEO *Hernan Lopez* in a release.

In the Courts: **EchoStar/DISH** has reached the end of the road in its multi-year litigation with **News Corp's NDS Group**, with **SCOTUS** refusing to hear the party's challenge of a '10 circuit court decision that absolved NDS of satellite piracy charges and awarded NDS \$18mln and the release of and additional \$4.3mln of its funds held in escrow pending the appeals. NDS is seeking a further \$1.7mln in attorney's fees, costs and interest.

Wireless: **Clearwire** inked a strategic wholesale and MVNE pact with **Simplexity**, which will become a reseller of



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Online: **Investigation Discovery**'s hoping you develop a jones for **IDAddicts.com**, its social platform that bowed Sat night offering live-stream chatter from **Facebook** and **Twitter**, info about upcoming net premieres and theme-prized giveaways. The site launched amid ID's new "Red Hot Saturday" lineup anchored by "Scorned: Love Kills," which set prime Sat records for the net among P2+ (1.04mln), HHs (805K), 25-54s (587K) and women 25-54 (395K).

Ratings: **CMT** landed a powerful 1-2 punch Sat night when "Bayou Billionaires" and "My Big Redneck Vacation" premiered back-to-back, and both series exceeded the net's previous record for original series telecast ratings. Bayou now holds the record by earning a 0.72 and 724K viewers among 18-49s, and Redneck ranks 2nd by garnering a 0.70/707K in the demo. -- The premiere of **Lifetime** original "Drew Peterson: Untouchable" averaged 5.8mln total viewers, the most for a cable original movie in 2 years and marking a 241% jump compared to the net's '11 original movie premiere avg.

Programming: **NBC Sports Group** scored the media rights to the **Breeders' Cup World Championships** beginning this Nov, with coverage of the important 2-day horse racing event to be featured across **NBC** and **NBC Sports Net**. Previous rights holder **ESPN** said the BC no longer gels with its overall content strategy. -- **Tr3s**' '12 content slate includes "Amigas, Inc." (fall), a show carrying *J-Lo* as an exec prod that chronicles 4 Miami teens who team to start a party planning business, and "The Ricardo Luna Project" (Mar) from exec prod *Wilmer Valderramo*, a docu-series focused on the eponymous BMX champion. -- **Animal Planet** picked up a 2nd season of "Call of the Wildman" and greenlit "Northwoods Law" (Mar), a reality series spotlighting Maine's game warden service.

People: **YES** upped *Ed Delaney* to svp, broadcast operations and engineering.

Obit: Cable is mourning the loss of *Jerry Lindauer*, a decorated Vietnam War vet and cable leader. Cause of death was unknown. His body was recovered over the weekend from Lake Austin, with the family telling the *American-Statesman* that he took his own life, having lived with chronic back pain for several years. He was 75. Lindauer served on the board of **NCTA** for more than 20 years, including as chmn from '90-'91. His telecom career began in '77 at **Communications Properties**.

Business/Finance: Having signed on to serve as **Disney** chmn/CEO until Mar '15, *Bob Iger* has at least a few more years to reap tens of millions in annual compensation. Last year, Iger pulled down a total of \$31.63mln including \$18.46mln in cash compensation, compared to a respective \$28.02mln and \$16.26mln in '10 and \$21.58mln and \$12.04mln in '09. -- **Needham** reaffirmed its 'buy' rating on **Time Warner Cable**, which reports 4Q and '11 earnings Thurs.

The Weather Channel at TCA: It's hard to believe that **Weather** will celebrate its 30th anniversary this year, and perhaps even harder to fathom the stunning transformation of the net since its inception. Its evolution was on display at winter TCA, with *Bob Walker*, evp/gm of networks and content noting that 12 big weather events caused more than \$1bln in damage in '11 and that the net is "the place people come to for big event weather." But he also touted an increasingly impressive slate of original series, including the upcoming 13-ep run of "Lifeguard" (Q1) about lifeguard rescues up and down the Southern CA coast and "Hurricane Hunters" about air force reservists who fly C-130s into the middle of hurricanes to bring back potentially life-saving data. But for its TCA panel, the net showcased docudrama anthology series "Braving the Elements" (Mar), which includes "Iron Men" about steel workers who work at dizzying heights building skyscrapers and "Turbine Cowboys" about those who build and maintain giant windmills. In both cases, weather can be deadly, as iron worker *George Berry* recalled for critics as he spoke of one seemingly calm day. "Next thing you know, a 40 mile an hour gust comes... and it's a really scary experience," he said. "I've been in situations where I worked down South and you got hit by hail storms unexpectedly. So it's pretty dangerous out there." The danger can take a toll on families. "Every day they understand that there is that potential disaster that could happen to you, and you could not come home one day," said iron worker *Dave Miller*. Added turbine worker *Manny Williams*: "It keeps you safe. It keeps your head in the game, because you want to go home to your kids and to your wife."

Hulu at TCA: Yeah, that's right. **Hulu** at TCA. You got a problem with that? To be sure, the online video powerhouse's 1st TCA appearance showcased a number of original series that may jolt the entity beyond its primary role as linear TV aggregator and into one of a bonafide original programmer. "The challenge is it can't be a student project," said Hulu svp, content *Andy Forssell*. "It's got to stand up to the best of TV that was on last night, because that's on Hulu as well." In fact, its initial mix of programming seems quite cable-like, with Hulu Plus becoming the home for subscription-supported original content in the vein of an **HBO** or **Showtime**. Nothing at Hulu's session rose to the level of a "Boardwalk Empire" or "Homeland," but the 3 originals showcased weren't slouches either, with high-profile producers like *J.D. Walsh*, *Morgan Spurlock* and *Richard Linklater* attached. Walsh's "Battleground" (Feb 14), for example, explores the behind-the-scenes chaos of a campaign

BUSINESS & FINANCE

staff working for a “distant third-place candidate.” Actor *Jay Hayden* praised the creative freedom afforded by Hulu. “It just felt it felt very safe,” he said. “It felt very comfortable immediately, and thus, I felt we were able to stretch as actors and really tell the story that J.D. wanted us to tell.” Asked to reveal the show’s budget, Walsh joked that “all the money of the Internet went to us.” Also new is “Up to Speed,” a travel show with eclectic “guide” *Timothy “Speed” Levitch* as he finds off-the-wall and out-of-the-way landmarks in America’s cities. “I don’t think you’d consider it a traditional travel show or a history show,” said Linklater. “Even though Speed is very much a historian, he’s going to show you things that you wouldn’t see on any typical tour.” And returning for Season 2 on Hulu is Spurlock’s “A Day in the Life” series in which the famous documentarian follows notables around for a day to experience their professions and lives. Obviously, they look for good days. “Ultimately we are protecting ourselves enough that we don’t want to follow somebody where there’s an incredible amount of downtime because it’s only 22 minutes, and we are getting all of our shooting done in one day,” said producer *Jeremy Chilnick*, noting a bit of “back and forth” with subjects on picking a day. “But as long as the day is authentic to who the person is, that’s the main thing.” In any event, Hulu’s TCA coming-out party may be the start of more to come. Stay tuned.

CableFAX Daily Stockwatch

Company	01/23 Close	1-Day Ch	Company	01/23 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
DIRECTV:	43.55	0.52	CLEARWIRE:	1.75	(0.1)
DISH:	28.63	(0.23)	CONCURRENT:	3.77	0.17
DISNEY:	39.25	(0.06)	CONVERGYS:	13.15	0.07
GE:	18.94	(0.21)	CSG SYSTEMS:	15.73	(0.02)
NEWS CORP:	19.77	0.11	ECHOSTAR:	25.01	0.81
MSOS					
CABLEVISION:	14.77	0.19	GOOGLE:	585.52	(0.47)
CHARTER:	57.00	(0.01)	HARMONIC:	5.82	0.15
COMCAST:	25.93	(0.14)	INTEL:	26.71	0.33
COMCAST SPCL:	25.40	0.02	JDSU:	13.27	(0.18)
GCI:	10.51	UNCH	LEVEL 3:	18.47	0.19
KNOLGY:	14.60	0.12	MICROSOFT:	29.73	0.02
LIBERTY GLOBAL:	45.16	(0.15)	MOTOROLA MOBILITY:	38.66	UNCH
LIBERTY INT:	16.75	(0.11)	RENTRAK:	17.14	(0.34)
SHAW COMM:	19.82	0.12	SEACHANGE:	7.10	0.15
TIME WARNER CABLE:	69.23	0.18	SONY:	18.53	0.68
VIRGIN MEDIA:	23.47	(0.28)	SPRINT NEXTEL:	2.25	(0.02)
WASH POST:	397.08	2.70	THOMAS & BETTS:	57.91	(0.27)
PROGRAMMING					
AMC NETWORKS:	41.70	(0.12)	TIVO:	10.35	0.05
CBS:	28.84	0.80	UNIVERSAL ELEC:	18.16	(0.07)
CROWN:	1.23	0.04	VONAGE:	2.33	(0.01)
DISCOVERY:	43.68	(0.12)	YAHOO:	15.68	(0.28)
GRUPO TELEVISA:	21.31	(0.22)	TELCOS		
HSN:	36.08	(0.6)	AT&T:	30.40	(0.11)
INTERACTIVE CORP:	42.11	(0.02)	VERIZON:	38.40	(0.57)
LIONSGATE:	9.38	0.01	MARKET INDICES		
LODGENET:	3.48	0.04	DOW:	12708.82	(11.66)
NEW FRONTIER:	1.07	(0.05)	NASDAQ:	2784.17	(2.53)
OUTDOOR:	7.83	0.01	S&P 500:	1316.00	0.62
SCRIPPS INT:	45.05	0.01			
TIME WARNER:	37.44	(0.16)			
VALUEVISION:	1.55	(0.04)			
VIACOM:	54.05	0.28			
WWE:	9.58	(0.04)			
TECHNOLOGY					
ADVANTAGE:	2.28	0.08			
ALCATEL LUCENT:	2.01	0.01			
AMDOCS:	29.50	0.10			
AMPHENOL:	55.08	(0.28)			
AOL:	15.56	(0.04)			
APPLE:	427.41	7.11			
ARRIS GROUP:	11.50	0.07			
AVID TECH:	9.80	0.01			
BLNDER TONGUE:	1.35	UNCH			
BROADCOM:	34.47	(0.54)			
CISCO:	19.83	(0.09)			

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EYE ON INNOVATION

No Longer Micro or Soft

There's some buzz on Wall St that Microsoft is finally beginning to get its groove back, that the sleepy, staid company could break through investors' malaise with new digital products and services such as Xbox Live and Skype. To be clear, MSFT has miles to go before it can even approach the consistent innovation and fierce customer loyalty enjoyed by firms such as Apple and Google. But the company is near a par with those 2 giants in terms of disruptiveness of the traditional cable biz—and players have wisely taken notice and moved to partner with Xbox Live and Skype initiatives.



Many of those tie-ups aren't new. Comcast's plan to allow subs to make and receive Skype video calls through HDTVs was announced in June, although a rollout date still hasn't been disclosed as employee testing continues. The MSO's feature of Xfinity on Demand through Xbox Live is also imminent, as is HBO Go's after Live subs received last month access to Epix, Hulu Plus and ESPN on Xbox Live. The why behind the partnerships, however, receives periodic explanation.

200mln people used Skype in 4Q, according to comments made last week during MSFT's earnings call, and more than 300bln minutes of calls were made over the network in '11, up 50% YOY.

"During the quarter, we started the integration of Skype's world-class communication products and global network platform into our portfolio of products and services," said CFO Peter Klein. "While it is still early, we are excited by the momentum we have seen thus far and by the opportunities to redefine social and real-time communications for consumers and businesses around the world."

Skype is already available on PCs, TVs and Blu-Ray players, as well as through Facebook and various mobile apps—which begs the question: how long until home phone services are rendered obsolete? Cable bundles, at

least, will slow the inevitable.

Xbox Live, meanwhile, is humming along while MSFT continues to expand its potential customer base for the service through blow-out console sales. The company sold 8.2mln Xbox 360 consoles in 4Q, up 25% YOY, and has sold 18mln Kinects in just over a year. Xbox Live members grew 33% last quarter, bringing total users of the service to approx 40mln.

"While it is early," said investor relations chief Bill Koefoed of the new content added to Xbox Live, "engagement has been quite impressive as the number of people using entertainment apps from November to December increased by almost 50%."

Last month, Epix pres/CEO Mark Greenberg raved about the net's relationship with Xbox Live. "The Xbox has offered numbers we've never seen," he said, noting how Epix has already amassed more than 1mln app downloads via the console. That's a pretty compelling argument in favor of Xbox Live participation by cable nets, considering Epix is available all over the digital landscape and is currently featured in fewer than 10mln TV homes.

Moreover, MSFT is working on its next-generation gaming console, Xbox 720, which is rumored to include DVR functionality. Imagine how much more popular content viewing through the console will become if that proves the case.

Given all this, MSFT, at the very least, should be on the radar of every cable op and programmer looking to expand further across multiple platforms. Xbox Live and Skype are the real deal, and as digital usage becomes increasingly important, will expand accordingly. That's not to say MSFT is the only blip on the imperative radar screen; such a statement would ridiculously omit the inarguable strength and popularity of Apple's iPad, say, or companies such as Netflix and Hulu Plus. But MSFT is getting its groove back and should be on the dance card of the cable industry.

-Chad Heiges

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