

# CableFAX Daily™

Monday — January 25, 2010

What the Industry Reads First

Volume 21 / No. 015

ADVERTISEMENT

## ratings envy.



**#1 cable network for 4th straight year**



**#1 upscale network in Business Day**



**#4 cable entertainment network**



**#2 cable news network beating CNN**



**#1 upscale network in Prime**



**Youngest, most upscale women's network**

Sources: USA: Nielsen Explorer, 12/29/08-12/27/09, M-Su 8p-11p, Live+7(000), P18-49 & P25-54, vs. all ad-supported cable networks. CNBC: Nielsen NPower, 12/29/08-12/27/09, Live, M-F 5a-7p, Live + SD, A25-54, Median Income ranked against all ad-supported cable nets. Syfy: Nielsen Explorer, Since Rebrand: 7/7/09-12/21/09; most current data=Live+7 thru 12/6, Live+SD thru 12/21; M-Su 8p-11p, P25-54(000) vs. ad-supported cable networks excluding sports networks. MSNBC: Nielsen Explorer, 12/29/08-12/27/09, M-Su 8p-11p, P25-54, L+SD(000) vs CNN, FXNC and HLN. Bravo: Nielsen MarketBreaks, 12/29/08-12/27/09, M-Su 8p-11p, Live+7, P18-49 w/ HH Income \$125K+ VPVH. Ranked against all ad-supported cable networks excluding sports networks. Oxygen: Youngest - Nielsen NPower, 12/29/08-12/27/09, M-Su 8p-11p, Live+7, Median Age based on F2+. Upscale - Nielsen MarketBreaks, 12/28/09-12/27/09, M-Su 8p-11p, Live+7, W18-49 with HH Income \$100k+ VPVH. Women's networks include Oxygen, Lifetime, LMN, WE and SOAP.



[nbcunetworks.com](http://nbcunetworks.com)

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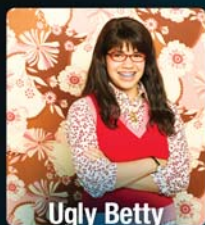
## Comcast Hire: Mr Smit Goes to Philly

It paid to steer **Charter's** ship through bankruptcy, with pres/CEO *Neil Smit* walking away with millions and the new job of pres, **Comcast Cable**. Smit was eligible for a \$6mIn bonus after Charter emerged from bankruptcy in Nov. We'll have to watch for Charter's 10K filing in Feb to find out the details. His new job at Comcast frees up **Steve Burke**, who served as both pres and COO of Comcast Cable as well as COO of **Comcast Comm**, to take on more responsibilities once the **NBCU** deal is complete. Smit, who starts the gig in Mar, will report to Burke and be responsible for all business aspects of Comcast's cable operations. That means Comcast Cable evps, such as *Dave Watson*, *Matt Bond* and CTO *Tony Werner*, will report to Smit. Once the NBCU deal closes, *Jeff Zucker* will report in to Burke. Burke said Smit's broad management experience will enable him to "hit the ground running." Smit's last day with Charter is Feb 28, with the St Louis-based MSO tapping COO *Mike Lovett* as interim pres/CEO. The board will conduct a national search for a new CEO, considering internal and external candidates. Lovett has built a name for himself, joining Charter in '03 as svp, operations support and climbing to his COO title in fewer than 2 years (did we mention he also balances being a dad to 7 kids?) "I joined Charter in 2005 with the objective to build a stronger company and to develop a world class team dedicated to meeting and exceeding our customers' needs for entertainment and communications services," Smit said. "With the completion of our financial restructuring—and knowing we have a very strong leadership team in place—this is an excellent time for me to move on to a new opportunity in this dynamic industry, and to watch Charter continue to excel."

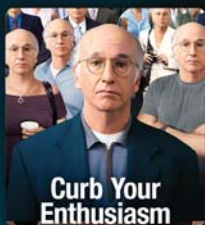
**Must Carry:** **Cablevision** has until Wed to file a must-carry appeal at the US Supreme Court, with others, such as **NCTA**, expected to lend their support. It could give the high court its 1st opportunity to revisit must carry in more than a decade. CVC has said it will file the petition, which stems from the US Court of Appeals for the 2nd Circuit upholding the FCC's must-carry mandate for **WRNN** of Kingston, NY. Research firm **Stifel Nicolaus** said Fri that it's unlikely SCOTUS will take the case, but if it did, "we believe there is a good chance they would overturn their prior decision." Not only would that be good news for cable, but it could be a boon for wireless since many must-carry stations would likely die and thus free up spectrum, the firm said. Stifel estimates that 40% of full-power stations are must-carry.

**NBCU Earnings:** Though still under **GE's** leadership, **NBCU** delivered mixed 4Q results Fri as **Comcast** no doubt looked on with interest. As segment rev dipped 4% to \$4.27bln and operating profit fell 30% to \$602mln (op profit decreased 28% in '09), cable again excelled to mitigate an improving NBC and underperforming film segment. Cable delivered 8% growth in both rev and op profit, with **Syfy**, **Oxygen** and **Bravo** all growing op profit by double-digits, and **CNBC** by 7%. Broadcast, meanwhile, saw rev slip by 2%, and op profit decrease, said CFO *Keith Sherin*, primarily due to **NFL** programming fees. But local ad sales were stronger than expected, he said, a key sign that the "advertising market is definitely improving." In 4Q, scatter pricing for broadcast was up low double-digits, for cable more than 30%, said Sherin, and the 1Q outlook calls

## The Ugly, The Bald and The Beautiful.



Ugly Betty



Curb Your Enthusiasm



Red Carpets

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for a respective gains of 20%+ and again more than 30%. GE sees an earnings shortfall for media in '10, primarily from an expected \$250mln loss on the **Vancouver Olympics**. Cable and the ad market are expected to see continued strength. A notable 4Q drag came from **Universal**, which saw a 25% drop in rev to \$1.2bln, and a \$200mln fall in op profit owing largely to a 64% YOY plummet in DVD sales. GE also noted a slower recovery in Internet display ads than other ad sectors.

**Broadband Speak:** Internet has the potential to "exacerbate inequality," with the have-nots missing out on job applications, the ability to submit questions in political debates and much more, FCC broadband chief *Blair Levin* said during a speech Fri to the **Minority Media & Telecom Assoc**. The problem is that building the infrastructure doesn't necessarily mean they will come, he said. The FCC's broadband team suggests tackling the challenge through social infrastructure (people are more likely to buy their 1st computer if they live in areas with high proportions of computer ownership), social innovation (community change online, such as foreclosure counseling) and social purpose media (including govt content, particularly for services that reach the poorest populations).

**On the Hill:** Feb 4 could be a busy day for **Comcast** and **NBCU**. The House Communications subcmte has scheduled a hearing for 9:30am on their proposed deal. The Sen Judiciary's Antitrust subcmte holds one on the deal that afternoon.

**Competition:** Available exclusively through **DISH** in the US, Russian channels **Russian Life**, **Maks TV**, **La Minor** and **Zhivi!** were added to the DBS op's intl programming lineup.

**In the States:** **Comcast** reached settlement with MI communities, including Dearborn and Bloomfield Township, to keep PEG channels on analog until it digitizes its entire lineup (or if the communities agree to digitize the channels). The cities sued in '08 to stop the MSO from moving the channels to digital. Comcast will give the towns \$250K to cover legal costs.

**Ratings:** Sounds like there are a lot of "Class 5 Stalkers" out there. The season finale of **MTV's** controversial and popular "Jersey Shore" delivered a 4.8 rating among 12-34s and more than 4.8mln viewers to establish series records. Immediately following the finale, "Jersey Shore: The Reunion" earned a 4.0 in the demo and more than 4mln viewers. -- **Comcast SportsNet Mid-Atlantic** scored with its Thurs night Capitals-Penguins telecast, which garnered a 3.3 HH rating and a 6.5 rating among men 25-54 to set all-time regular-season Caps records for the net.

**Programming:** **NAB** pres/CEO *Gordon Smith* appears on **C-SPAN's** "The Communicators," Sat 6:30pm ET (repeats on **C-SPAN 2** Mon at 8am, 8pm). Topics discussed include spectrum (leave broadcaster's spectrum alone!) and retrans (he advocates making the costs of broadcast stations similar to that of cable nets).

**On the Circuit:** The **WICT** New England Chapter earned the org's Chapter of the Year Award, and **WICT** Midwest's pres *Denise Farley*, **Mediacom's** sr dir, div ops, earned the nod for Chapter Pres of the Year. Other winners include: Greater Chicago's *Joan Gundlach* and Southern CA's *Gena Barnhart* (**NBCU**) as Advisors of the Year; Greater TX's *Dana Gage* (**Tribune**) as Leader of the Year; Midwest's *Rochelle Stewart* (**Comcast**) as Volunteer of the Year; Midwest, Pacific NW and Northern CA as Most Improved Chapters; and Atlanta for Mentoring Excellence and the Enterprise Award.

**People:** **MPAA** head *Dan Glickman* is stepping down Apr 1 to become pres, **Refugees Intl.** **MPAA** pres/COO *Bob Pisano* will serve as interim chief executive during the search for a replacement. -- *Robert Nashak* was named evp, digital entertainment for **BBC Worldwide**.

## The CableFAXIES awards

DEADLINE: FEBRUARY 5, 2010

ENTER AT: [www.CableFaxiesAwards.com](http://www.CableFaxiesAwards.com)

**Sponsorship Opportunities:** Debbie Vodenos at 301-354-1695; dvodenos@accessintel.com

**Entry Questions:** Saun Sayamongkhun at 301-354-1610; ssayamongkhun@accessintel.com

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 of the CableFAXIES Awards are from networks, operators, PR firms, vendors, corporations, agencies and other entertainment companies who took chances, made tremendous strides and understand the power of PR and marketing in the cable industry. The winners and honorable mentions will be saluted during an awards event in April 2010 in New York City.

## CableFAX Week in Review

Company	Ticker	1/22 Close	1-Week % Chg	YTD %Chg
<b>BROADCASTERS/DBS/MMDS</b>				
BRITISH SKY:	BSY	34.44	(7.84%)	(4.91%)
DIRECTV:	DTV	31.38	(5.82%)	(5.91%)
DISH:	DISH	18.81	(5.52%)	(9.44%)
DISNEY:	DIS	29.98	(2.03%)	(7.04%)
GE:	GE	16.11	(2.01%)	6.48%
NEWS CORP:	NWS	14.74	(5.09%)	(7.41%)

Company	Ticker	1/22 Close	1-Week % Chg	YTD %Chg
<b>MSOS</b>				
CABLEVISION:	CVC	25.86	(3.94%)	0.15%
COMCAST:	CMCSA	15.85	(4.69%)	(5.99%)
COMCAST SPCL:	CMCSK	15.21	(4.1%)	(5%)
GCI:	GNCMA	5.92	(4.21%)	(7.21%)
KNOLOGY:	KNOL	11.00	(2.05%)	0.73%
LIBERTY CAPITAL:	LCAPA	24.67	2.37%	3.31%
LIBERTY GLOBAL:	LBTYA	23.54	3.47%	7.54%
LIBERTY INT:	LINTA	10.79	(3.83%)	(0.46%)
MEDIACOM:	MCCC	4.23	(8.24%)	(5.37%)
RCN:	RCNI	9.47	(5.68%)	(12.72%)
SHAW COMM:	SJR	19.11	(2.95%)	(7.1%)
TIME WARNER CABLE:	TWC	43.84	(4.78%)	5.92%
VIRGIN MEDIA:	VMED	15.11	(11.79%)	(10.22%)
WASH POST:	WPO	446.82	(0.01%)	1.64%

Company	Ticker	1/22 Close	1-Week % Chg	YTD %Chg
<b>PROGRAMMING</b>				
CBS:	CBS	13.30	0.30%	(5.34%)
CROWN:	CRWN	1.33	(15.29%)	(8.28%)
DISCOVERY:	DISCA	30.89	(4.75%)	0.72%
GRUPO TELEVISIA:	TV	19.68	(3.58%)	(5.2%)
HSN:	HSNI	18.62	(6.57%)	(7.78%)
INTERACTIVE CORP:	IACI	20.49	(3.94%)	0.05%
LIBERTY:	L	35.73	(3.98%)	(1.71%)
LIBERTY STARZ:	LSTZA	47.68	(4.64%)	3.32%
LIONSGATE:	LGF	5.47	0.00%	(5.85%)
LODGENET:	LNET	6.01	1.01%	8.68%
NEW FRONTIER:	NOOF	2.06	(10.43%)	8.99%
OUTDOOR:	OUTD	5.37	2.29%	(7.41%)
PLAYBOY:	PLA	3.41	(4.21%)	6.56%
RHI:	RHIE	0.40	(4.17%)	29.84%
SCRIPPS INT:	SNI	44.00	(2.61%)	6.02%
TIME WARNER:	TWX	27.20	(3.41%)	(6.66%)
VALUEVISION:	VVTV	4.36	(12.27%)	(9.17%)
VIACOM:	VIA	31.31	0.16%	(0.6%)
WWE:	WWE	15.71	(1.75%)	2.48%

Company	Ticker	1/22 Close	1-Week % Chg	YTD %Chg
<b>TECHNOLOGY</b>				
3COM:	COMS	7.55	0.40%	0.67%
ADC:	ADCT	6.07	(6.47%)	(2.25%)
ADDVANTAGE:	AEY	2.11	4.98%	7.11%
ALCATEL LUCENT:	ALU	3.40	(8.6%)	2.41%
AMDOCS:	DOX	29.17	2.46%	2.24%
AMPHENOL:	APH	40.54	(7.53%)	(12.21%)
AOL:	AOL	23.72	(6.47%)	1.89%
APPLE:	AAPL	197.75	(3.97%)	(6.16%)
ARRIS GROUP:	ARRS	10.82	(3.31%)	(5.34%)
AVID TECH:	AVID	12.60	(7.01%)	(1.25%)
BIGBAND:	BBND	3.24	(4.42%)	(5.81%)
BROADCOM:	BRCM	28.43	(3.66%)	(9.66%)

Company	Ticker	1/22 Close	1-Week % Chg	YTD %Chg
CISCO:	CSCO	22.97	(5.86%)	(4.05%)
CLEARWIRE:	CLWR	6.77	(9.13%)	0.15%
COMMSCOPE:	CTV	28.61	0.00%	7.84%
CONCURRENT:	CCUR	3.85	(4.23%)	(2.78%)
CONVERGYS:	CVG	11.11	(4.31%)	3.35%
CSG SYSTEMS:	CSGS	17.78	(3.79%)	(6.86%)
ECHOSTAR:	SATS	19.05	(1.8%)	(5.41%)
GOOGLE:	GOOG	550.01	(5.17%)	(11.29%)
HARMONIC:	HLIT	6.19	(3.28%)	(2.06%)
INTEL:	INTC	19.91	(4.28%)	(2.4%)
JDSU:	JDSU	8.08	(1.58%)	(2.06%)
LEVEL 3:	LVL	1.50	4.90%	(1.96%)
MICROSOFT:	MSFT	28.96	(6.16%)	(4.99%)
MOTOROLA:	MOT	7.21	(4.88%)	(7.09%)
OPENTV:	OPTV	1.52	0.66%	11.76%
PHILIPS:	PHG	28.26	(7.25%)	(4.01%)
RENTRAK:	RENT	16.87	(6.33%)	(4.53%)
SEACHANGE:	SEAC	6.46	0.16%	(1.52%)
SONY:	SNE	34.18	2.52%	17.86%
SPRINT NEXTEL:	S	3.37	(11.78%)	(7.92%)
THOMAS & BETTS:	TNB	33.50	(4.15%)	(6.4%)
TIVO:	TIVO	9.78	1.98%	(3.93%)
TOLLGRADE:	TLGD	6.38	(1.54%)	4.42%
UNIVERSAL ELEC:	UEIC	25.07	(0.56%)	7.97%
VONAGE:	VG	1.61	3.87%	15.00%
YAHOO:	YHOO	15.88	(5.59%)	(5.36%)

Company	Ticker	1/22 Close	1-Week % Chg	YTD %Chg
<b>TELCOS</b>				
AT&T:	T	25.39	(1.55%)	(9.42%)
QWEST:	Q	4.31	(3.79%)	2.38%
VERIZON:	VZ	30.34	(0.78%)	(8.42%)

Index	Ticker	1/22 Close	1-Week % Chg	YTD %Chg
<b>MARKET INDICES</b>				
DOW:	DJI	10172.98	(4.12%)	(2.45%)
NASDAQ:	IXIC	2205.29	(3.61%)	(2.81%)

### WINNERS & LOSERS

#### THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. ADDVANTAGE:	2.11	4.98%
2. LEVEL 3:	1.50	4.90%
3. VONAGE:	1.61	3.87%
4. LIBERTY GLOBAL:	23.54	3.47%
5. BLNDER TONGUE:	1.16	2.65%

#### THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. CROWN:	1.33	(15.29%)
2. VALUEVISION:	4.36	(12.27%)
3. VIRGIN MEDIA:	15.11	(11.79%)
4. SPRINT NEXTEL:	3.37	(11.78%)
5. NEW FRONTIER:	2.06	(10.43%)

## From The CableFAX 100

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