

# CableFAX Daily™

Friday — March 6, 2009

*What the Industry Reads First*

Volume 20 / No. 042

## In The Clear: Additional WiMAX Details Emerge

**Time Warner Cable, Comcast** and others have faced a barrage of doubt recently regarding their weighty investments in **Clearwire**, for issues ranging from dramatic write downs stemming from Clearwire's faltering share price (-45% in '09), a dearth of related WiMAX availability beyond Portland and Baltimore, and the approaching rollout of rival LTE tech by **Verizon** and **AT&T**. Even questions concerning Clearwire's financial viability to embark on rollout plans have persisted. Clearwire's Thurs earnings call offered some answers. CEO *Benjamin Wolff* stressed that overnight expansion isn't necessary for success and said the company is "better positioned than ever," with its expansion efforts "in full swing." Clear-branded mobile broadband services will bow in Las Vegas and Atlanta this summer, he said, and later this year in Chicago, Philadelphia, Dallas-Fort Worth, Seattle, Honolulu and Charlotte. Earlier this week, **TWC CFO Rob Marcus** said Clearwire services may bow in a couple TWC markets by year-end—certainly in at least 1. No word, though, on whether Dallas, Charlotte or Honolulu will go live 1st. As for Portland, a portion of **Comcast's** footprint that went live Jan 6, network performance there "has exceeded the targets we set for ourselves," said Wolff. Noting "diverse industry demand" in the city, COO *Perry Satterlee* said 65% of its Clear customers are new to mobile services and that 70% were prior broadband subs. In Baltimore, where WiMAX services have been offered under the **Sprint** name since late '08, a 2nd buildout phase is underway to improve coverage. Clear will enter later in '09. All told, markets covering 75mln people are currently under construction or development, execs said, and coverage of 120mln by the end of '10 remains a viable goal. 2 chief reasons for optimism remain the company's vast spectrum licenses and its use of relatively cheap microwave backhaul. Targeting \$1.5-\$1.9bln in total '09 net cash spend, Clearwire's heartened by the impending availability of numerous WiMAX products and devices. Expected are approx 100 devices and products by year-end, including laptops and a dual-mode wireless modem giving Clear customers a national data footprint with Sprint's 3G network.

**Retrans:** Not surprisingly, broadcasters are pushing hard for retrans fees as a way to match cable's dual rev stream—and are achieving some definite success. The latest benefactor is **Univision**, which announced Thurs multi-year retrans agreements with **AT&T's U-verse TV, Insight** and myriad smaller ops such as **Atlantic Broadband** and **Qwest**. Though terms of the deals weren't disclosed, it's important to note that this is Univision's 1st go-around seeking retrans consent, a strategy that has resulted in earlier deals with **Comcast** and **DirectTV**. Meanwhile, **Nexstar** reported a 27% jump in '08 retrans rev to \$21.8mln, and expects approx \$25mln in like rev this year.

**Competition:** A new promotion from **Verizon** offers new **FiOS TV** or FiOS Internet customers through Apr 19 free access to the FiOS TV Spanish Language Package for 30 days and a waived activation fee, or \$46 in savings. The package includes 27 nets including **CNN en Espanol, Discovery Familia** and **ESPN Deportes**. Separately,

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the telco has launched FiOS Internet in a pair of JPI-owned apartment buildings in D.C., and plans to launch FiOS services in other JPI properties in MD, VA, PA, MA, TX and CA. -- **DISH** has added local HD channels in 6 markets including Las Vegas and Boise, and now offers them in 107 markets covering 84% of US homes.

**Carriage:** Digital Spanish net **V-me** said its penetration of Hispanic homes will broach 70% after the Jun DTV transition, and reach 80 by year-end. The net airs in 35 US markets.

**Ratings:** Cable viewers chose *Kyra Sedgwick* over *President Obama* last week, making TNT's "The Closer" (4.6/4.53mln) the winning telecast yet again. Still, blocks of coverage related to the President's inaugural Congressional address notched half of the week's top 10 slots—3 on **Fox News**, 2 on **CNN**—led by Fox News' address feature and post analysis, which combined for a 3.8/3.65mln. CNN's corresponding pair of coverage blocks averaged a 3.6/3.51mln. -- **USA** led all networks (surprise!) with a 2.5/2.48mln, outpacing runner-up Fox News' 2.0/1.95mln. TNT (1.7/1.70mln) managed the bronze medal, and was followed by **Disney** (1.6/1.55mln) and **TBS** (1.4/1.41mln). -- **Brag Book:** The season 5 finale of **E!**'s "The Girls Next Door" scored a 1.81 HH rating and averaged more than 2.2mln viewers to become the series' highest-rated and most-watched ep ever. -- **NFL Net** recorded 5mln viewers for its exclusive coverage of the '09 NFL Scouting Combine, a record 26% increase over last year. -- Rose, Blanche and the crew helped the premiere of "Golden Girls" on **Hallmark** (Sun, 8:30pm-3am) deliver a 1.0 HH avg in prime, driving time-period increases of at least 26% among HHs, women 25-54 and 25-54s. -- The Tues ep of **Oxygen's** "Bad Girls Club" earned a series high among women 18-49 (644K). -- **Comcast SportsNet Bay Area's** coverage of Tues night's San Jose/Dallas game registered an avg HH rating of 2.1 to become the net's highest-rated regular season San Jose telecast in history.

**Programming:** Based on the novels of *Alexander McCall Smith*, drama series "The NO. 1 Ladies' Detective Agency" bows on **HBO** Mar 29. -- Beginning Mar 13, **DirectTV** and cable ops including **Comcast**, **Charter**, **Cox** and **Insight** will offer sneak peeks of the 1st eps of **Starz's** returning series "Head Case" and debut series "Party Down" via on demand and/or online. The series air on Starz Mar 20. -- **Fox Sports en Espanol** announced Spanish-language coverage of **World Extreme Cagefighting** beginning Mar 20. -- **ESPN's** "Her Story" (Mar 27) will culminate the net's celebration of Women's History Month that includes special programming and vignettes. -- **Lifetime** picked up a 2nd season of "Rita Rocks."

**Carriage:** **CBS College Sports Net** has picked up 3mln subs through movement to **DirectTV's** **Choice Xtra** package, and now counts approx 32mln subs overall.

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# BUSINESS & FINANCE

**Online:** Oxygen is launching a suite of digital tools, including e-commerce initiative "shopOholio." In Jan, it added "makeOvermatic" (add a photo, get a virtual makeover), which has generated more than 1mln page views.

**New Media:** Pentagon Channel's newest video podcast "Command Performance" (available on iTunes and the net's Website) takes service members backstage with favorite entertainers and lets them interview the performers. The audience will be able to submit questions online for the roster of upcoming interviews.

**People:** Insight Comm promoted Keith Hall to svp/deputy genl counsel. -- Comcast appointed Kristine Dankenbrink svp, taxation. -- The Weather Channel tapped Geoffrey Darby as evp, programming.

**Business/Finance:** Wall St's continued surliness squeezed many share prices Thurs, but those of Cablevision and CBS were particularly affected, plummeting a respective 11% and 10.9% to close at 52-wk lows of \$10.24 and \$3.43. -- UBS has upgraded AT&T to "buy" from "neutral" and slightly raised its related '09 estimates. The firm believes the telco's dividend is not only safe, but will be raised in Dec. -- Prime Time Comm has completed its acquisition of Falcon Broadband, a multichannel operator in Colorado Springs. -- S&P is maintaining a "strong buy" on Time Warner Cable, whose 1-for-3 reverse split is set for Mar 12.

## CableFAX Daily Stockwatch

Company	03/05 Close	1-Day Ch	Company	03/05 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
BRITISH SKY:	24.99	(0.46)	AMDOCS:	16.23	(0.46)
DIRECTV:	19.84	(0.71)	AMPHENOL:	24.05	(1.25)
DISH:	9.07	(0.52)	APPLE:	88.84	(2.33)
DISNEY:	15.99	(0.95)	ARRIS GROUP:	6.33	0.19
GE:	6.66	(0.03)	AVID TECH:	8.87	(0.72)
HEARST-ARGYLE:	1.70	0.12	BIGBAND:	4.92	(0.28)
NEWS CORP:	6.09	(0.33)	BLNDER TONGUE:	1.10	0.17
<b>MSOS</b>					
CABLEVISION:	10.24	(1.26)	BROADCOM:	16.32	(0.23)
CHARTER:	0.02	0.00	CISCO:	14.55	(0.7)
COMCAST:	12.00	(0.74)	CLEARWIRE:	3.00	(0.28)
COMCAST SPCL:	11.20	(0.65)	COMMSCOPE:	7.78	(0.4)
GCI:	4.16	(0.62)	CONCURRENT:	2.83	(0.01)
KNOLOGY:	3.87	(0.13)	CONVERGYS:	5.79	(0.52)
LIBERTY CAPITAL:	4.75	(0.18)	CSG SYSTEMS:	13.33	(0.33)
LIBERTY ENT:	16.97	(0.75)	ECHOSTAR:	14.35	(0.99)
LIBERTY GLOBAL:	11.19	(0.93)	GOOGLE:	305.64	(13.28)
LIBERTY INT:	2.74	(0.25)	HARMONIC:	4.57	(0.47)
MEDIACOM:	3.27	(0.6)	INTEL:	12.31	(0.45)
SHAW COMM:	14.06	(0.5)	JDSU:	2.35	(0.2)
TIME WARNER CABLE:	18.20	(0.51)	LEVEL 3:	0.73	(0.02)
VIRGIN MEDIA:	4.17	(0.21)	MICROSOFT:	15.27	(0.85)
WASH POST:	326.00	(17.05)	MOTOROLA:	3.17	(0.28)
<b>PROGRAMMING</b>					
CBS:	3.43	(0.42)	OPENTV:	1.24	(0.01)
CROWN:	1.72	0.01	PHILIPS:	14.55	(1.23)
DISCOVERY:	15.21	(0.24)	RENTRAK:	9.76	(0.22)
EW SCRIPPS:	0.86	(0.07)	SEACHANGE:	4.38	(0.34)
GRUPO TELEVISA:	11.14	(0.81)	SONY:	17.51	(0.77)
HSN:	4.19	(0.05)	SPRINT NEXTEL:	3.07	(0.25)
INTERACTIVE CORP:	14.25	(0.26)	THOMAS & BETTS:	20.81	(1.24)
LIBERTY:	18.25	(1.57)	TIVO:	6.65	(0.57)
LODGENET:	0.59	(0.04)	TOLLGRADE:	5.70	(0.2)
NEW FRONTIER:	1.40	0.01	UNIVERSAL ELEC:	14.88	(0.55)
OUTDOOR:	5.22	(0.07)	VONAGE:	0.38	0.00
PLAYBOY:	1.15	(0.17)	YAHOO:	12.53	(0.63)
RHI:	3.11	0.00	<b>TCLCOS</b>		
SCRIPPS INT:	18.51	(0.94)	AT&T:	22.56	(0.44)
TIME WARNER:	7.06	(0.43)	QWEST:	3.14	(0.05)
VALUEVISION:	0.30	0.02	VERIZON:	27.91	(0.24)
VIACOM:	15.00	(0.79)	<b>MARKET INDICES</b>		
WWE:	9.22	(0.23)	DOW:	6594.44	(281.4)
<b>TECHNOLOGY</b>					
3COM:	2.16	(0.21)	NASDAQ:	1299.59	(54.15)
ADC:	2.90	(0.32)			
ADVANTAGE:	1.39	(0.11)			
ALCATEL LUCENT:	1.20	(0.03)			

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# BATTLE OF THE BANDS

CABLE SHOW 2009  
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**PROGRAMMER'S PAGE** with Chad Heiges and Seth Arenstein

**Still Bad**

This week, we sat down with Joel Stillerman, svp, original programming, production and digital content at **AMC**, to discuss the net's recent string of hits. **Season 2 of "Breaking Bad" (premieres Sun, 10pm) seems very accessible. Do you try to make it so to lure new viewers who've not seen season 1?** Yes. The idea behind season 2 is that you should be able to tune in Sun night at 10 and if you haven't seen a frame of season 1 be right there with the story. By the end of that episode [showrunner *Vince Gilligan*] has wisely reminded you that *Walt [Bryan Cranston]* has cancer... and within the first two minutes you know about his dark underworld of meth. **Are there other ways you are trying to lure new viewers?** We are marathoning all of season 1 [7 eps] beginning Saturday at 8pm ET, and there's a short recap of season 1 at [amctv.com](http://amctv.com) right now. We also have [Breaking Bad co-stars] *Bryan Cranston* and *Aaron Paul* hosting movies for us as part of our "March Badness" promotion, where viewers vote for Hollywood's most notorious badasses. **Walt's extended absences to cook meth largely are overlooked by his wife and son. Will that be resolved this season?** It actually is. It's cruel to do this, but it's actually one my favorite parts of the season. A little hint is that it's a bit of an homage to something in season 1. **Any dates yet for "Mad Men" season 3 and AMC's version of "The Prisoner"?** No, not yet. **Your Hollywood moment?** We were at the Golden Globes celebrating *Mad Men's* victory as best drama series. My son is a huge *Seth Rogen* fan. I texted him that Seth was sitting a few tables away from me. He wanted me to get Seth on the phone, but I didn't think that was a good career move. I got Seth to take a picture with me. My son was a big hero the next day at school, and when I told Seth I was with AMC, he told me he was a huge fan of "Mad Men." SA

**Highlights:** "Ashes to Ashes," series premiere, Sat, 9pm, **BBC America**. Sequels rarely outshine their originals. Not so with "Ashes to Ashes," successor to "Life on Mars," BBC Am's time-traveling police hit. *Ashes* augments its plot by allowing Det Inspector Alex Drake (the sublime *Keeley Hawes*) to be fully aware of time traveling, which is good because she understands she's been transported to 1981. The interaction between Drake and new boss Gene Hunt (*Philip Glenister* reprising his Mars role as a loutish chief inspector) is priceless. -- "Breaking Bad," season 2 premiere, Sun, 10pm, **AMC**. Season 2's initial 3 eps are easily accessible and loaded with Hitchcockian thrills. SA

**Worth a Look:** "Battles BC," Mon, 9pm, **History**. The hype is the "300"-like CGI to show bloody battles, but the series' storytelling stands on its own. First up is *Hannibal*, his mercenary force and trained elephants. SA

**Notable (Not Reviewed):** "NBA Friday," Cavaliers at Celtics, 8pm, Fri, **ESPN** (and regional nets). Both teams have clinched playoff spots and the Celts' *Garnett* isn't healthy, but it still should be a good one. -- "The L Word," series finale, Sun, 9pm, **Showtime**. This sexy series' final season, its 6th, was one of its best, even if it revolved around the death of Jenny, the show's most annoying character by far. SA

Basic Cable Rankings (2/23/09-3/01/09) Mon-Sun Prime			
1	USA	2.5	2479
2	FOXN	2	1953
3	TNT	1.7	1695
4	DSNY	1.6	1550
5	TBSC	1.4	1413
6	NAN	1.3	1309
6	ESPN	1.3	1247
8	AMC	1.2	1132
9	LIFE	1.1	1097
9	A&E	1.1	1078
9	HIST	1.1	1052
9	HALL	1.1	962
13	TOON	1	1013
13	HGTV	1	953
15	CNN	0.9	932
15	FAM	0.9	900
15	FX	0.9	869
15	DISC	0.9	866
15	MSNB	0.9	837
15	CMDY	0.9	828
21	SPK	0.8	819
21	SCIF	0.8	795
21	FOOD	0.8	781
21	TLC	0.8	761
21	TRU	0.8	749
21	BRAV	0.8	720
21	LMN	0.8	518
28	MTV	0.7	726
28	VH1	0.7	703
28	TVLD	0.7	703
28	NOGG	0.7	501
32	BET	0.6	552
33	HLN	0.5	514
33	EN	0.5	507
33	APL	0.5	452
33	OXYG	0.5	345
33	NGC	0.5	333
38	ESP2	0.4	390
38	TTC	0.4	361
38	SOAP	0.4	314
38	WGNA	0.4	295
38	GSN	0.4	268
38	ID	0.4	188
38	TV1	0.4	168
45	CMT	0.3	296
45	TWC	0.3	269

\*Nielsen data supplied by ABC/Disney



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# CableFAX

THE MAGAZINE

The Close Date: March 9  
Artwork: March 11  
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In the April issue *CableFAX: The Magazine* we salute a selection of cable's leading women as we honor WICT's 30th anniversary. To celebrate 30 years of WICT, we profile women in their 30s demonstrating leadership qualities and graduates of WICT's Betsy Magness Leadership Institute (right). Place your congratulatory ad today for the Class of 2009: Women on the Move.



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