

CableFAX Daily™

Monday — March 21, 2011

What the Industry Reads First

Volume 22 / No. 053

March Madness: New Format Boasts Highest Ratings in 20 Years

Thurs' coverage of the NCAA Div I Men's tourney across **TBS, CBS, TNT** and **truTV** combined to deliver an overnight HH rating/share of 5.7/13—making it the highest rating for the 1st Thurs of the tournament in metered markets since '91 when it expanded to 4 telecast windows for the entire day. Ratings were up 24% from 4.6/11 for **CBS Sports** in '10. Fast nationals Fri afternoon put the rating/share at 5.0/12.2, still the most-watched first Thurs since '91. NCAA March Madness on Demand delivered a 22% increase in total visits across online and mobile apps Thurs—with 7.6mln visits across platforms and 3.3mln total hours of live, streaming video. And move over **Time Warner Cable's** iPad app. The NCAA March Madness on Demand app rose to the #1 downloaded spot in the iTunes App store Thurs. The impressive numbers came against the backdrop of some fretting over cable's rights to the hoop action. Rep *Joe Courtney* (D-CT) and Sen *Richard Blumenthal* (D-CT) complained to NCAA pres *Mark Emmert* and CBS pres/CEO *Les Moonves* that as many as 150K over-the-air HHs in his state would not be able to watch Thurs' game between the UConn and Bucknell because it aired on TNT. Local CBS affil **WFSB** aired Wofford vs Brigham Young. "I believe the public interest would be better served by enabling fans in Connecticut to view Thursday night's game, instead of limiting its accessibility to just those households that have cable or satellite service," Blumenthal wrote in a letter to Emmert and Moonves. The high ratings make it unlikely such concerns will gain much traction. Many welcomed the new 4-game format because it means that for the 1st time, every NCAA game will be shown in its entirety. Reviews of the new format were generally glowing. "The production is slick, the graphics timely and improved," said an article in the *Austin American Statesman* Fri. "And then there are the entertaining studio shows. Turner has trotted out its NBA guys—*Ernie Johnson, Kenny Smith* and, of course, *Sir Charles Barkley*—and they are making it more fun." The *NJ Star-Ledger* called the coverage a pleasant surprise. "Having all 4 games on at once is a nice way to be able to flip back and forth between good and bad games," the paper said. Of course, buzzer-beaters on all 4 nets Thurs didn't leave everyone smiling. **ESPN** reported that 76% of the brackets on **ESPN.com** had Louisville in the Sweet 16. Better luck next year.

Merger Mania: The **FCC** approved the merger of **CenturyLink** and **Qwest** Fri, conditioning it on the launch of a

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April 6 • 8:30 – 10:30am
Grand Hyatt, NYC

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RESULTS:
The community participation and response exceeded expectations. Beyond the numerous on-site sign-ups, the two-day event delivered 60,000 impressions, 9,000 booth visits and more than 40 media hits.

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major broadband adoption program aimed at low income consumers (qualifying HHs would be offered broadband at less than \$10/mo and a computer for less than \$150). Other conditions also show the influence of the National Broadband Plan, such as a condition increasing the capacity of the Qwest network to actual download speeds of at least 4Mbps to at least 4mln more homes and businesses and at least 20K more anchor institutions, such as schools and libraries. The merged company also agreed to more than double the number of homes and businesses that can get 12Mbps and triple the number that can get 40Mbps. The combined company also must phase down 3 forms of USF support designed for smaller companies and ensure the deal doesn't harm interconnection agreements with competing phone carriers.

Portal Reax: As expected, the **FCC** is slated to take up wireless roaming and pole attachment orders at its open meeting Apr 7, with the Commission releasing a preliminary agenda Thurs night (**Cfax**, 3/18). "We commend chmn [Julius] Genachowski for moving forward on the important issue of wireless data roaming," said **NCTA** evp James Assey. "As new entrants look to expand consumer choice for wireless Internet access service using licensed spectrum, enforceable roaming rights enable competitors to offer a nationwide service and compete with incumbent providers." One such possible new entrant could be **Bright House**. While it currently does not offer a wireless service, it has been active at the FCC on wireless data roaming, saying the difficulty in obtaining agreements hinders its ability to roll out such a service. Bright House svp corporate strategy & biz dev **Leo Cloutier** was mum on any wireless plans, but noted the company has made significant investments in that area through **SpectrumCo** and **Clearwire**. "It's a positive step," he said of the FCC's move. **Cox**, which has launched its wireless service in various markets, said it commended the FCC on addressing "barriers to bringing additional wireless communications options to American consumers." Cable's also happy that the FCC will vote at that meeting on establishing uniform pole attachment rates based on the cable rate, saying it will provide regulatory certainty and encourage buildout of broadband networks.

In the States: **Cox** launched Cox Mobile Connect, an iPad, iPhone and Android app that lets subs manage and control their DVR and phone services. -- **Netflix** announced it bought the rights to **David Fincher** series "House of Cards," starring **Kevin Spacey**, committing to at least 26 eps. The series, based on a '90s **BBC** miniseries on British politics at the end of the Thatcher era, is the 1st exclusive TV program to originate on Netflix.

Programming: **Univision** will host a town hall with Pres **Obama** Mon, 7pm, with the dialogue being education and Hispanic educational attainment. It will air on Univision Mar 28, 7pm ET and also will be streamed online at www.EsEIMomento.com. -- **Comcast Hometown Net** (regional net covering Northern and Central CA) will televise 44 live minor league games this year. -- **Sportsman Channel** will debut docu-comedy series, "Foul Hook'd," about making a fictional, low-budget fishing show, Apr 2, 10:30pm ET. -- **CMT** created a TV movie div and an attendant **CMT Original Movies** franchise focused primarily on romantic comedies. Set for summer premiere's, the initiative's 1st 2 movies include "To the Mat," starring **Rick Schroder**, and **LeAnn Rimes** feature "Reel Love." -- **WE tv** renewed "Joan & Melissa: Joan Knows Best?" for a 2nd season (Jan). -- **Planet Green's** reality series "Dresscue Me" (Apr 19) spotlights a boutique owner who caters to stars including **Katy Perry**. -- **ESPN** picked up the soccer rights to the **Copa del Rey Final** (Apr 20) and **Spanish Supercopa** (Aug) for feature on ESPN Deportes and **ESPN3.com**. -- **Encore** will honor 85-yr-old **Jerry Lewis** with a late-summer original doc. Those scheduled to appear include: **Jerry Seinfeld**, **Alec Baldwin**, **Chevy Chase** and **Woody Harrelson**.

On the Circuit: Registration is open for the **CTAM Consumer Insights Conference**, June 15-17, in Chicago. Speakers include **Parthenon Group** vice chair and former **Pepsi** N America CEO **Dawn Hudson**.

People: **Discovery Comm** upped **Micheline Gauthier** to svp, talent business and legal affairs.

Business/Finance: **Charter** agreed to purchase 4.5mln shares of its Class A common stock from funds advised by **Franklin Advisers**, paying \$46.10 share (\$207,450,000). The transaction is expected to close Tues and will be funded from existing cash on hand and available liquidity. The shares will initially be held as treasury stock, and the company will determine whether to cancel or retain as treasury stock at a later date. -- **DirectTV** CEO **Michael White** earned \$32.9mln in compensation during his 1st full year on the job. The bulk of that came in \$14.7mln in stock awards. He received \$12.5mln in option awards and a base salary of \$1.45mln.

CableFAX Week in Review

Company	Ticker	3/18 Close	1-Week % Chg	YTD %Chg
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BROADCASTERS/DBS/MMDS

DIRECTV:	DTV	44.80	(2.35%)	34.33%
DISH:	DISH	23.88	1.92%	14.97%
DISNEY:	DIS	41.23	(3.96%)	27.84%
GE:	GE	19.25	(5.45%)	27.23%
NEWS CORP:	NWS	17.15	(4.46%)	7.73%

MSOS

CABLEVISION:	CVC	34.97	(1.3%)	35.44%
CHARTER:	CHTR	48.37	1.17%	0.00%
COMCAST:	CMCSA	23.86	(4.37%)	41.52%
COMCAST SPCL:	CMCSK	22.42	(4.72%)	40.04%
GCI:	GNCMA	9.76	(10.62%)	52.98%
KNOLOGY:	KNOL	13.31	0.23%	21.89%
LIBERTY CAPITAL:	LCAPA	70.77	(3.03%)	196.36%
LIBERTY GLOBAL:	LBTYA	40.86	(4.29%)	86.66%
LIBERTY INT:	LINTA	15.59	(4.59%)	43.82%
SHAW COMM:	SJR	20.76	(0.38%)	0.92%
TIME WARNER CABLE:	TWC	67.87	(1.34%)	63.98%
VIRGIN MEDIA:	VMED	27.18	0.00%	61.50%
WASH POST:	WPO	434.85	2.53%	(1.08%)

PROGRAMMING

CBS:	CBS	23.23	(2.39%)	65.34%
CROWN:	CRWN	1.92	(15.79%)	32.41%
DISCOVERY:	DISCA	39.24	(4.13%)	27.94%
GRUPO TELEVISIA:	TV	22.87	(3.42%)	10.16%
HSN:	HSNI	30.37	(0.98%)	50.42%
INTERACTIVE CORP:	IACI	29.16	(3.25%)	42.38%
LIBERTY:	L	42.14	0.41%	15.93%
LIBERTY STARZ:	LSTZA	76.73	0.14%	66.26%
LIONSGATE:	LGF	5.90	(1.99%)	1.55%
LODGENET:	LNET	3.28	7.19%	(40.69%)
NEW FRONTIER:	NOOF	1.82	(12.08%)	(3.7%)
OUTDOOR:	OUTD	7.15	(2.19%)	23.28%
SCRIPPS INT:	SNI	48.77	(2.36%)	17.52%
TIME WARNER:	TWX	34.72	(4.43%)	19.15%
VALUEVISION:	VVTV	6.62	0.46%	37.92%
VIACOM:	VIA	50.19	(2.79%)	59.33%
WWE:	WWE	12.01	(5.21%)	(21.66%)

TECHNOLOGY

ADVANTAGE:	AEY	3.09	14.44%	56.85%
ALCATEL LUCENT:	ALU	5.07	(4.88%)	52.71%
AMDOCS:	DOX	28.30	(3.35%)	(0.81%)
AMPHENOL:	APH	55.16	(1.99%)	19.45%
AOL:	AOL	19.00	(1.91%)	(18.38%)
APPLE:	AAPL	330.67	(6.06%)	56.92%
ARRIS GROUP:	ARRS	12.01	(3.15%)	5.07%
AVID TECH:	AVID	22.37	0.90%	75.31%
BIGBAND:	BBND	2.54	0.00%	(26.16%)
BLNDER TONGUE:	BDR	1.95	(5.34%)	71.05%
BROADCOM:	BRCM	39.67	(1.2%)	26.06%
CISCO:	CSCO	17.14	(4.51%)	(28.4%)
CLEARWIRE:	CLWR	5.29	(8.16%)	(21.75%)
CONCURRENT:	CCUR	6.25	6.84%	57.83%
CONVERGYS:	CVG	13.65	(1.66%)	26.98%
CSG SYSTEMS:	CSGS	19.47	(1.62%)	1.99%

Company	Ticker	3/18 Close	1-Week % Chg	YTD %Chg
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ECHOSTAR:	SATS	35.45	0.40%	76.02%
GOOGLE:	GOOG	561.06	(2.71%)	(9.5%)
HARMONIC:	HLIT	8.48	(4.07%)	34.18%
INTEL:	INTC	19.93	(4.5%)	(2.3%)
JDSU:	JDSU	18.93	(10.96%)	129.45%
LEVEL 3:	LVLT	1.27	(7.3%)	(16.99%)
MICROSOFT:	MSFT	24.80	(3.43%)	(18.64%)
RENTRAK:	RENT	23.52	(2.65%)	33.11%
SEACHANGE:	SEAC	8.80	(4.97%)	34.15%
SONY:	SNE	31.54	(5.71%)	8.76%
SPRINT NEXTEL:	S	5.05	1.00%	37.98%
THOMAS & BETTS:	TNB	56.53	(0.39%)	57.95%
TIVO:	TIVO	8.45	(3.76%)	(16.99%)
TOLLGRADE:	TLGD	10.03	0.20%	64.16%
UNIVERSAL ELEC:	UEIC	27.46	3.66%	18.26%
VONAGE:	VG	4.18	(4.13%)	198.57%
YAHOO:	YHOO	16.03	(7.98%)	(4.47%)

TELCOS

AT&T:	T	27.94	0.07%	(0.32%)
QWEST:	Q	6.93	3.74%	64.61%
VERIZON:	VZ	35.84	(0.03%)	8.18%

MARKET INDICES

DOW:	DJI	11858.52	(1.54%)	13.72%
NASDAQ:	IXIC	2643.67	(2.65%)	16.50%
S&P 500:	GSPC	1279.21	(1.92%)	11.75%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. ADVANTAGE:	3.09	14.44%
2. LODGENET:	3.28	7.19%
3. CONCURRENT:	6.25	6.84%
4. QWEST:	6.93	3.74%
5. UNIVERSAL ELEC:	27.46	3.66%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. CROWN:	1.92	(15.79%)
2. NEW FRONTIER:	1.82	(12.08%)
3. JDSU:	18.93	(10.96%)
4. GCI:	9.76	(10.62%)
5. CLEARWIRE:	5.29	(8.16%)

CableFAX workshop

How to Motivate Employees to Boost Bottom Line and Retention

Reports and statistics show that a motivated workplace is essential to the financial success of an organization. With cable competition perhaps at an all-time high and budgets tighter than they've been in years, MSOs, programmers and vendors must maximize employee talent. On top of that, managers are being asked to do more with less. In this climate, motivation, leadership and retention have become even more important to the bottom-line.

Questions: Contact Kate Schaeffer at kschaeffer@accessintel.com or 301.354.2303

Register today at www.cablefax.com/april5

April 5, 2011 8:45am-4:30pm NYC

