

CableFAX Daily™

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What the Industry Reads First

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By the Numbers: Data Show 18-49s Seek Truth in Programming

According to **Turner** data through Mar 21, ad-supported cable's overall 1Q prime rating and share among the important 18-49 demo failed to achieve a YOY gain, marking just the 2nd time that has happened since '01. Yet there's no need for the industry to panic, as the Winter Olympics acted the chief culprit in both instances, said Turner chief research chief officer *Jack Wakshlag*, and broadcast would've fared worse if not for the audience boost **NBC** derived from those same events. The more interesting story here is the 18-49 demo's apparent growing predilection for non-fiction programming on cable. Up against the same Games as fiction-dominated nets, those specializing in non-fiction fare belied hardly any viewership impediment at all from int'l hockey, skiing, skating, etc. Of the 35 ad-supported nets that averaged at least 200K 18-49s in prime in 1Q09, 60% saw decreases in the demo in 1Q10, according to **Nielsen** data, while a staggering 15 of the 16 that achieved gains primarily feature non-fiction content. The list of gainers includes **E!** (+23%), **History** (+17%), **truTV** (+15%), **Animal Planet** (+13%), **Oxygen** (+11%) and **Science Channel** (+10%). **Lifetime Movie Net** (+12) was the lone included fiction-dominated net. Oxygen joined **A&E** (+6%) in notching their best Qs ever in 1Q, the former earning a double-digit YOY increase among 18-34s as well and the latter delivering growth among all key demos. Moreover, 3 of the top 5 returning shows in 1Q delivery among 18-49s were non-fiction, according to Turner, led by E!'s "Keeping Up with the Kardashians" and including History's "Pawn Stars" and Lifetime's "Project Runway." That same 3-of-5 count applied to the list of top new shows too, as **Discovery's** "Life" paced all while **MTV's** "Jersey Shore" and "Teen Mom" hit the top 5. By contrast, just 1 of the top returning shows among 18-49s in 1Q09 were non-fiction based, and 2 of the top new shows. Still, none of the above-mentioned nets was able to best the usual stalwarts in 1Q prime HH rating, with **USA** leading the way for its 15th consecutive quarterly victory. **Fox News** and **Disney Channel** followed in a tie for 2nd, ahead of **TNT**, **Nick-at-Nite** and **ESPN** in 5th. But ESPN (+14), Disney Channel (+14%) and Fox News (+2%) did see growth among 18-49s in the Q—and excellence in the demo is still quite attractive to advertisers. Just ask **Discovery Nets**.

Speedway: Suddenlink's 107Mbps Internet service may be the fastest residential offering in the country. It is available now to parts of suburban Austin, TX (Georgetown, Pflugerville and Leander), with more launches planned for the year. With upload speeds of up to 5mbps, the service retails for \$107 when bundled with phone or video and \$120 when it's a

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standalone service. The "High Speed Internet MAX 107.0" service is the result of a Suddenlink program that calls for approx \$350mln of capital investments nationwide through '12, above and beyond the company's traditional capital spending levels. The MSO is also expanding its 50Mbps to other markets this year.

3DTV: Time Warner Cable, Cablevision and Canada's Shaw will join Comcast and Cox in offering 3D Masters coverage, according to August National Golf Club. Comcast is the official 3D distributor, delivering the content over fiber connections to any MSO that gets the rights. Additional operators could also make deals for the content.

Comcast-NBCU: Despite grumbling over the proposed Comcast-NBCU transaction, a couple of positive comments from state legislators recently joined the FCC's record. "I have seen firsthand Comcast's commitment to creating quality jobs and promoting diversity in programming here in our state," wrote MS House Majority Leader Tyrone Ellis. TX State rep Sylvester Turner praised the MSO for outreach efforts such as "Family Fun Day" and support of community organizations such as Change Happens. He called Comcast "one of our top corporate citizens." Not everyone agrees, with the Latino Business Chamber of Greater L.A. telling the FCC that Latinos are unlikely to benefit from the jv. The group cited a lack of Latinos in key exec positions at both firms, a failure of "sufficient positive" Latino content and "more than occasional" negative Latino stereotyping. Among recommendations: Public hearings in at least 5 major markets with large Latino populations and an FCC-appointed bilingual Special Master to analyze characters and content for a typical week of programming for NBC and Comcast, and to suggest changes. Meanwhile, the CBS affiliate board is hoping Comcast-NBCU will agree to voluntary safeguards to ensure the jv doesn't act anti-competitively in dealing with non-ABC affils, according to TV NewsCheck.

At the Portals: Verizon used the blogosphere to urge the FCC to act on its program access complaint against Cablevision over MSG HD. "We filed our complaint over 8 months ago, and there's nothing left for the FCC to do but act on it," wrote Verizon rep Bill Kula. AT&T has also asked the FCC to resolve its complaint against Cox excluding Cox 4 San Diego (which includes Padres games). In Jan, the FCC tightened the terrestrial loophole letting cable ops withhold such content.

In the States: DirecTV plans to hire 100 people in Southwest VA for a new virtual call center, according to local press reports. -- Comcast completed a 300-mile network expansion in VT, including to 4 communities that had no previous access to its advanced broadband services (South Hero, Grand Isle, North Hero and Brookline). -- Along with the launch of WFNBayArea.com, a site dedicated to fishing in the San Francisco Bay Area, WFN launched a promotion whereby former NFLer Roger Craig will take 1 winner on a fishing trip, with coverage to air on the net.

Competition: DISH is offering "V: A Behind the Scenes Exclusive," a 30-min show featuring footage and interviews not available with any other pay-TV provider, Mar 30-Apr 11, 11pm and 11:30pm ET on DISH Network Channel.

Online: Time Warner Cable agreed to offer its subs who get YES and reside in the NY Yankees' home bcstg territory a live streaming package of the net's club telecasts, joining Cablevision and Verizon in featuring similar products.

Upfronts: WE tv announced 6 new series, building on the network's success with what pres/gm Kim Martin described as "stories about modern families and different stages in a woman's life." "Sunset Daze" follows a "party down" AZ retirement home (debuts Apr 28). "Downsized" (4Q) chronicles a large family with dramatically reduced means in their quest to become the "cheapest family in America." "Mother Knows Best" (4Q) features Joan Rivers at her unfiltered best after moving in with daughter Melissa. Therapy show "Fix my Family" (1Q) tackles more serious family issues, but with an ultimately

CableFAX PROGRAM AWARDS

Sponsorship Opportunities: Debbie Vodenos at 301.354.1695 or dvodenos@accessintel.com
Entry Questions: Rebecca Stortstrom at 301.354.1610 or rebecca@accessintel.com

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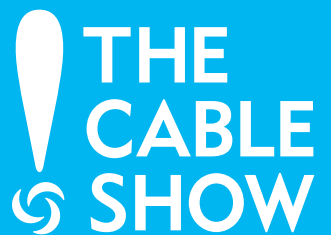
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BUSINESS & FINANCE

uplifting theme. In “You’re Wearing That?!?” mothers and daughters make each other over (May 14), while “Girl Meets Gown” (Apr 25) expands the wedding franchise, focusing on one of the busiest bridal boutiques in Texas. WE also acquired the full 8-season library of “Charmed” (June 21).

On the Circuit: NBC/Universal

Media Studios evp, alternative programming *Paul Telegdy* joined **Spike** svp, original series *Sharon Levy* and **Original Productions** CEO/exec prod *Thom Beers* as a member of the '10 **Factual Ent Forum** advisory board, charged with finalizing with *reelscreen* a conference agenda (Jun 2-3, Santa Monica) aimed at producers and bcstrs in the fact ent/reality space.

People: Lionsgate tapped *Priscilla Pesci* as svp, TV mktg. -- **Cablevision** named *Todd Brecher* svp/assoc general counsel. -- *Robert Feierbach* joined **Hughes** as vp, sales and mktg.

Business/Finance: With reports of consumer confidence up, the Dow hit an 18-month high. **Time Warner Cable** closed up 1.7% at \$53.45 and hit a new 52-week high of \$53.62. **Comcast**, up 1.3% to \$18.74, hit a new high of \$18.84. -- **CBS** commenced a tender offer for up to \$500mln combined aggregate principal amount of specified outstanding debt series, including notes and/or debentures due in '11 and '12. -- **Soleil Securities** initiated **Lionsgate** with a 'buy' rating and \$8 price target.

CableFAX Daily Stockwatch

Company	03/30 Close	1-Day Ch	Company	03/30 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	35.02	0.18	AMPHENOL:	42.22	(0.2)
DIRECTV:	32.93	(0.3)	AOL:	25.68	(0.26)
DISH:	20.57	0.09	APPLE:	235.84	3.46
DISNEY:	35.10	(0.06)	ARRIS GROUP:	12.15	(0.09)
GE:	18.30	(0.1)	AVID TECH:	14.22	0.23
NEWS CORP:	17.03	(0.14)	BIGBAND:	3.45	0.02
MSOS					
CABLEVISION:	23.95	(0.01)	BLNDER TONGUE:	1.10	(0.01)
COMCAST:	18.74	0.24	BROADCOM:	33.22	(0.09)
COMCAST SPCL:	17.88	0.26	CISCO:	26.65	0.14
GCI:	5.85	0.02	CLEARWIRE:	7.22	0.02
KNOLLOGY:	13.68	(0.01)	COMMSCOPE:	28.43	(0.31)
LIBERTY CAPITAL:	36.52	(0.12)	CONCURRENT:	5.91	(0.05)
LIBERTY GLOBAL:	29.17	0.39	CONVERGYS:	12.57	(0.12)
LIBERTY INT:	15.21	0.20	CSG SYSTEMS:	21.41	0.16
MEDIACOM:	6.02	(0.13)	ECHOSTAR:	20.01	0.25
RCN:	15.13	(0.22)	GOOGLE:	566.71	4.26
SHAW COMM:	19.85	0.12	HARMONIC:	6.34	(0.06)
TIME WARNER CABLE:	53.45	0.88	INTEL:	22.34	0.01
VIRGIN MEDIA:	16.97	0.01	JDSU:	11.99	0.03
WASH POST:	441.25	(1.82)	LEVEL 3:	1.58	(0.01)
PROGRAMMING					
CBS:	14.15	0.01	MICROSOFT:	29.77	0.18
CROWN:	1.96	(0.01)	MOTOROLA:	7.20	(0.03)
DISCOVERY:	34.24	0.64	PHILIPS:	32.02	(0.28)
GRUPO TELEVISA:	21.03	0.10	RENTRAK:	21.65	0.54
HSN:	30.00	(0.85)	SEACHANGE:	7.16	(0.05)
INTERACTIVE CORP:	22.78	(0.09)	SONY:	38.84	0.41
LIBERTY:	37.23	(0.13)	SPRINT NEXTEL:	3.82	0.03
LIBERTY STARZ:	53.90	0.71	THOMAS & BETTS:	39.13	0.32
LIONSGATE:	6.22	(0.02)	TIVO:	16.78	0.19
LODGENET:	7.12	0.02	TOLLGRADE:	6.37	0.09
NEW FRONTIER:	1.95	0.03	UNIVERSAL ELEC:	22.49	0.02
OUTDOOR:	6.60	(0.17)	VONAGE:	1.32	(0.02)
PLAYBOY:	3.73	0.08	YAHOO:	16.61	0.05
RHI:	0.20	0.01	TELCOS		
SCRIPPS INT:	44.58	0.51	AT&T:	25.95	(0.56)
TIME WARNER:	31.39	(0.17)	QWEST:	5.23	(0.04)
VALUEVISION:	3.32	(0.16)	VERIZON:	31.23	0.78
VIACOM:	36.13	0.25	MARKET INDICES		
WWE:	17.42	0.06	DOW:	10907.42	11.56
TECHNOLOGY					
3COM:	7.72	0.01	NASDAQ:	2410.69	6.33
ADC:	7.45	0.05			
ADVANTAGE:	2.27	(0.05)			
ALCATEL LUCENT:	3.18	(0.14)			
AMDOCS:	30.30	0.05			



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