

# CableFAX Daily™

Monday — April 28, 2008

What the Industry Reads First

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## Playing Catch: Turner/Ops Partner On Braves Baseball

Several multichannel ops have struck inventive and atypical deals with **Turner** allowing them to simulcast certain **Atlanta Braves** games within the team's **MLB** territory, which covers portions of GA, AL, MS, TN, NC and SC. The agreements include the 45 games to air exclusively this season on Turner's **Peachtree TV**, an OTA station serving the Atlanta DMA and the only local broadcaster we know of that owns telecast rights to MLB games. Typically, cable RSNs have such rights locked up. Partnerships include **Cox**, **Charter**, **Comcast**, **Time Warner Cable**, **Mediacom** and **DirecTV**, and talks with **DISH** are ongoing, said **Turner Net Sales** vp *Coleman Breland*. The deals are similar, sources say, in that the ops have the option to air the games through regional systems, but different with respect to remuneration. None involve cash, but rather various mutually beneficial arrangements such as ad rev sharing. In the Macon, GA, area Cox will insert the games on its local original channel, while Charter and Comcast will use **Comcast/Charter Sports SE**. Placement of the games became an issue for Turner after **TBS**, which for years had broadcast Braves games nationally, switched this season to airing 26 Sun afternoon MLB games instead. In Oct **WTBS**, which had carried the Braves games in Atlanta via its TBS simulcast, was rechristened Peachtree TV, and Turner decided to telecast 45 games on the network. Team broadcast partners **FSN South** (25 games) and **Sports South** (81) remain, and Fox offered to simulcast Peachtree's games in the nets' respective 12mIn and 9mIn regional homes. Turner declined, apparently intent on further developing Peachtree. The Braves represent "the most important original local programming," said Peachtree svp/gm *Jonathan Katz*. "It's a vital local connection to the Atlanta audience." The net also features nightly movies and sit-coms, but Katz said additional sports content is "critical" for long-term success. Options to that end are currently being explored, he said. FSN South and/or Sports South have the rights to Atlanta's Thrashers (NHL) and Hawks (NBA) for years to come.

**Sundance Fest: Cablevision** is said to be in the lead to buy **Sundance Channel**, with the *NY Post* citing 2 sources close to negotiations. CVC reportedly had the highest bid when offers were submitted 2 weeks ago. The paper said a final decision is expected over the weekend, with an announcement as early as Monday. Cablevision and Sundance had no comment Fri. **Viacom** and **Time Warner** are also thought to be in the running.

**Competition:** Starting Thurs, qualifying **AT&T** HSD and Wi-Fi customers will have complimentary Wi-Fi access at more than 7K Starbucks nationwide. Deployment of the service has already started in San Antonio and will continue throughout the year. -- A lawsuit filed 8 years ago by **DISH Network** retail distributors was certified as a class-action case by an Arapahoe County (CO) District judge, the *Denver Post* reports. More than 20K direct and indirect retailers claim they are owed years of past-due commissions and fees. -- **AT&T** has expanded **U-verse** TV availability in WI to include 200K homes in the Milwaukee, Racine and Sheboygan areas. -- **AT&T** stockholders re-elected



is for happy hour



March marks the 22nd consecutive month we're happily at home as a Top 10 network in primetime.

Source: Nielsen Galaxy Explorer, June '04 - March '08 (3/29/08 - 3/28/08), Monthly Prime Time (M-Su 8-11p), Live+SD coverage area (H) ratings among all ad-supported cable networks. Further qualifications available upon request.

CABLEFAX DAILY (ISSN 1069-6644) is published daily by Access Intelligence, LLC ● www.cablefax.com ● fax:301/738-8453 ● Editor-in-Chief: Amy Maclean, 301/354-1760, amaclean@accessintel.com ● Exec Editor, Michael Grebb, 301/354-1790, mgrebb@accessintel.com ● Assoc Editor, Chad Heiges, 301/354-1828, cheiges@accessintel.com ● Asst VP, Ed Director, Seth Arenstein, 301/354-1782, sarenstein@accessintel.com ● Publisher: Debbie Vodenos, 240/753-5696, dvodenos@accessintel.com ● Advertising Mgr: Erica Gottlieb, 212/621-4612 ● Marketer: Doreen Price, 301/354-1793, dprice@accessintel.com ● Marketing Director: Carol Bray, 301/354-1763, cbray@accessintel.com ● Prod: Joann Fato, cdaily@accessintel.com ● Diane Schwartz/VP and Group Publisher ● Paul Maxwell/Columnist.Subs/Client Services: 301/354-2101, fax 301/309-3847 ● Group Subs : Angela Gardner, 757/531-1369, cfaxgroupsub@accessintel.com

the company's 14 current board members, including CEO *Randall Stephenson*, and defeated several stockholder proposals, including one requiring additional reporting of political contributions made by the telco.

**Diversity:** Verizon topped *DiversityInc* magazine's '08 list for "Top 50 Companies for Diversity," with 39% of the telco's managers being black, Asian, Latino or Native American. **Cox Comm**, the lone MSO on the list, came in at #6—a huge jump from last year's #25 spot. New at Cox this year are local employee diversity and inclusion councils in each operating system. Also on the list: **AT&T** (22), **Turner** (23), **Sprint** (35) and **Disney** (36).

**In the States:** Cox has added **The Pentagon Channel's** VOD offering in N VA.

**CableCARDS 101:** With switched digital and CableCARDS getting a lot of attention (not all of it accurate) in the blogosphere recently, **NCTA** invited a few bloggers and reporters for an overview on the tech Fri. *Neal Goldberg* and *Bill Check* went through the history of CableCARDS, where tru2way is going and took questions in the conference call, which lasted just over an hour. Read one blogger's takeaways here: <http://www.gizmolovers.com/2008/04/25/ncta-conference-call-on-cablecard-and-tru2way>

**Ratings:** TNT's **NBA** playoff coverage averaged a 2.1 US rating, a 16% increase over last year. Through 9 games, TNT has also seen an 18% increase in HH (2.3mln) as well as growth among 18-34s (26%), 18-49s (26%) and 25-54s (25%).

**Research:** Revenue from mobile media and ent services in the US will grow more than 110% by '12, to \$6.6bln, according to **Analysys Research**. Mobile TV and VOD will lead the 5-yr charge, with overall video services expected to account for 36% of mobile media rev by '12. Growth factors: simplified pricing or content and apps; improvements to service accessibility and use; and wider content availability.

**Programming:** *Cybill Shepherd* joins the cast of **USA's** "Psych," when Season 3 bows July 18. -- **Food Net's** "Semi-Homemade Cooking With Sandra Lee" will celebrate its 200th ep May 3. The daytime series premiered in '03. -- **Animal Planet's** movie "Meerkat Manor: The Story Begins" (May 25) premieres on the net after a debut at this year's **Tribeca Film Festival**. A look at the movie's production follows its linear premiere, and the series returns in Jun.

**Online:** **Pentagon Channel** added an FTP site to Pentagonchannel.mil consisting of MPEG-2 audio files of programs for download. -- **Retirement Living TV** has launched **FreedomYears.com** to provide health information and interactivity surrounding issues on aging. The portal is a vertical site for RL.TV. -- **TVLand.com** has added nearly 1K trailers from old movies such as "Chariots of Fire" and "Risky Business."

**People:** **AOL** chief marketing officer *John Burbank* will join **Nielsen** in the same capacity May 9. -- **Bravo** tapped *Jerry Leo* as svp, program strategy and acquisitions.

**Business/Finance:** **DISH Network** pres/CEO *Charlie Ergen* earned a base salary of \$592K last year, with another \$1.4mln in option awards and \$554K in other compensation. -- **Vonage** secured \$215mln in private debt financing from an undisclosed 3rd party. It intends to use the net proceeds, plus cash on hand, to repay, tender for or redeem its existing convertible notes, which have a principal amount due of about \$253mln. -- **DirectTV** will become part of the **NASDAQ-100** Index and the **NASDAQ-100 Equal Weighted Index** prior to Wed's market open. It replaces **BEA Systems**.

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### CableFAX Week in Review

Company	Ticker	4/25 Close	1-Week % Chg	YTD %Chg
<b>BROADCASTERS/DBS/MMDS</b>				
BRITISH SKY:	BSY	43.40	(2.1%)	(7.8%)
DIRECTV:	DTV	25.25	(2.1%)	9.20%
DISNEY:	DIS	32.36	3.30%	0.20%
ECHOSTAR:	DISH	30.59	(4.4%)	(9.9%)
GE:	GE	33.33	2.00%	(5.1%)
HEARST-ARGYLE:	HTV	20.82	(1.2%)	(4.6%)
ION MEDIA:	ION	1.45		12.40%
NEWS CORP:	NWS	18.33	(3.3%)	(12.9%)

Company	Ticker	4/25 Close	1-Week % Chg	YTD %Chg
<b>MSOS</b>				
CABLEVISION:	CVC	22.93	0.00%	(6.4%)
CHARTER:	CHTR	0.97	4.30%	(17.1%)
COMCAST:	CMCSA	19.53	(3.1%)	7.60%
COMCAST SPCL:	CMCSK	19.24	(3.1%)	6.80%
GCI:	GNCMA	6.30	1.00%	(28%)
KNOLOGY:	KNOL	13.03	(5%)	2.00%
LIBERTY CAPITAL:	LCAPA	15.58	(3.5%)	(29.1%)
LIBERTY ENT:	LMEDIA	25.66	1.70%	6.10%
LIBERTY GLOBAL:	LBTYA	33.45	(3.7%)	(14.6%)
LIBERTY INTERACTIVE:	LINTA	15.29	(1%)	(19.9%)
MEDIACOM:	MCCC	4.27	2.40%	(7%)
ROGERS COMM:	RG	42.97		
SHAW COMM:	SJR	20.60	0.20%	(10%)
TIME WARNER CABLE:	TWC	26.65	(2.5%)	(3.4%)
VIRGIN MEDIA:	VMED	12.63	3.00%	(22.8%)
WASH POST:	WPO	688.00	(0.2%)	(12%)

Company	Ticker	4/25 Close	1-Week % Chg	YTD %Chg
<b>PROGRAMMING</b>				
CBS:	CBS	22.25	(0.1%)	(15.6%)
CROWN:	CRWN	4.51	(6%)	(30.6%)
DISCOVERY:	DISCA	22.22	(2.4%)	(11.6%)
EW SCRIPPS:	SSP	44.45	0.90%	(0.3%)
GRUPO TELEVISIA:	TV	26.04	3.50%	9.50%
INTERACTIVE CORP:	IACI	20.29	(4.7%)	(24.6%)
LIBERTY:	L	1.00		(90.6%)
LODGENET:	LNEN	5.63	(13.5%)	(67.7%)
NEW FRONTIER:	NOOF	5.15	(1.3%)	7.80%
OUTDOOR:	OUTD	7.45	0.40%	8.00%
PLAYBOY:	PLA	8.49	(1.6%)	(6.9%)
TIME WARNER:	TWX	15.26	2.80%	(6.5%)
UNIVISION:	UVN	36.23		
VALUEVISION:	VVTV	5.17	(4.4%)	(17.8%)
VIACOM:	VIA	38.81	(3.7%)	(11.8%)
WWE:	WWE	17.69	(6.7%)	28.00%

Company	Ticker	4/25 Close	1-Week % Chg	YTD %Chg
<b>TECHNOLOGY</b>				
3COM:	COMS	2.38	2.60%	(47.3%)
ADC:	ADCT	13.78	5.10%	(11.3%)
ADVANTAGE:	AEY	3.79	3.60%	(38.6%)
ALCATEL LUCENT:	ALU	6.83	10.00%	(6.7%)
AMDOCS:	DOX	31.50	(2.5%)	(8.6%)
AMPHENOL:	APH	46.30	3.00%	0.00%
APPLE:	AAPL	169.73	5.40%	(14.3%)
ARRIS GROUP:	ARRS	7.11	7.60%	(28.8%)
AVID TECH:	AVID	20.97	(11.5%)	(26%)
BIGBAND:	BBND	7.47	2.80%	45.30%
BLNDER TONGUE:	BDR	1.45		(12.7%)

Company	Ticker	4/25 Close	1-Week % Chg	YTD %Chg
BROADCOM:	BRCM	27.99	21.30%	7.10%
CISCO:	CSCO	25.60	4.40%	(5.4%)
COMMSCOPE:	CTV	40.97	0.40%	(16.7%)
CONCURRENT:	CCUR	0.71		(14.5%)
CONVERGYS:	CVG	16.41	(1%)	(0.3%)
CSG SYSTEMS:	CSGS	12.29	(2.5%)	(16.5%)
ECHOSTAR HOLDING:	SATS	29.75	0.40%	(9.6%)
GEMSTAR TVG:	GMST	5.15	4.30%	8.20%
GOOGLE:	GOOG	544.06	0.90%	(21.3%)
HARMONIC:	HLIT	8.59	1.90%	(18%)
JDSU:	JDSU	14.85	3.90%	12.00%
LEVEL 3:	LVL	2.73	17.20%	(10.2%)
MICROSOFT:	MSFT	29.83	(0.6%)	(15.3%)
MOTOROLA:	MOT	9.24	(0.1%)	(40.5%)
NDS:	NNDS	50.25	4.00%	(15.2%)
NORTEL:	NT	8.36	12.80%	(44.7%)
OPENTV:	OPTV	1.15	(2.5%)	(12.9%)
PHILIPS:	PHG	38.33	7.40%	(3.2%)
RENTRAK:	RENT	13.61	2.10%	(5.7%)
SEACHANGE:	SEAC	7.03	(3.8%)	(2.8%)
SONY:	SNE	45.63	4.70%	(16%)
SPRINT NEXTEL:	S	7.91	18.60%	(39.8%)
THOMAS & BETTS:	TNB	40.79	(2.9%)	(16.8%)
TIVO:	TIVO	8.43	(2.8%)	1.10%
TOLLGRADE:	TLGD	5.01	(3.8%)	(37.5%)
UNIVERSAL ELEC:	UEIC	26.42	(6.3%)	(21%)
VONAGE:	VG	2.02	11.60%	(12.2%)
WEBB SYS:	WEBB	0.03	(25%)	(25%)
YAHOO:	YHOO	26.80	(5.7%)	15.20%

Company	Ticker	4/25 Close	1-Week % Chg	YTD %Chg
<b>TELCOS</b>				
AT&T:	T	38.58	2.90%	(3.3%)
QWEST:	Q	4.90	3.80%	(26.7%)
VERIZON:	VZ	37.04	2.80%	(11.3%)

Index	4/25 Close	1-Week % Chg	YTD %Chg
<b>MARKET INDICES</b>			
DOW:	12891.86	0.30%	(2.8%)
NASDAQ:	2422.93	0.80%	(8.6%)

### WINNERS & LOSERS

#### THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. BROADCOM:	27.99	21.30%
2. SPRINT NEXTEL:	7.91	18.60%
3. LEVEL 3:	2.73	17.20%
4. NORTEL:	8.36	12.80%
5. VONAGE:	2.02	11.60%

#### THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. WEBB SYS:	0.03	(25%)
2. LODGENET:	5.63	(13.5%)
3. AVID TECH:	20.97	(11.5%)
4. WWE:	17.69	(6.7%)
5. UNIVERSAL ELEC:	26.42	(6.3%)

Television is part of the family room.  
Univision is part of the family.



# MaxFAX...

## Finger-Pointing...

I'll sue you.

You'll sue me.

I don't like your ad.

You don't like my ad.

I don't like your petty interference with my plant and my customers.



Paul S. Maxwell

You aren't playing fair!

Waste of money all around.

## Random Notes:

### • Home Run?

*Forbes* (05/05) has often been critical of cable companies... but in a semi-surprisingly upbeat article on **Liberty Media's** Atlanta Braves, the magazine lauds Dr. *John Malone's* hands-off ownership. None of that should have been a surprise... John's "bureaucracy" isn't like **Time Warner's**. Besides, he's got the well-seasoned, long-trusted *Terry McGuirk* running the Braves.

• **4-Play Redux?** Pivot punked... but a study from **Compete, Inc** says 43% of those surveyed would "be either 'likely' or 'very likely' to consider purchasing cell phone service from their telco provider." Overall conclusion: bundles will get bigger as "interest in bundles increased 55% from July 2007 through March 2008." Maybe

Pivot launched too early? The key, methinks, goes to true "bundling" with "complete and seamless interoperability." Maybe via Wi-Max?

• **No More Martin(et):** I've been calling the peculiar Chairman of the Federal Confusion Commission *Kevin Martin(et)* ever since he turned so anti-cable. Well, I won't call him that anymore and imply that someone is pulling his strings. Won't do that anymore. Was reading the Kable Kid column in *The Morning BRIDGE* the other day and the Kid has found a better name for the Chairman: Kevin Martian. His opinions do seem so otherworldly, don't they?

• **Books Shipped:** Four large boxes of hard-bound, non-fiction political and history books are on their way to New Orleans and new shelves in Katrina-ravaged high school library. Don't get blasé... go to <http://2008.thecableshow.com/CableCares/Home.aspx> right now! Hey! I need some help carrying out the garbage and the detritus as we re-make an elementary school playground!

• **Pioneers!** Here and there... **Colorado Cable TV Pioneers** will again convene at the **Cable Center** on Thursday, May 8th... and this time watch a **C-SPAN** class. And don't forget the annual Pioneers' Dinner at the Cable Show in New Orleans Sun evening, May 18.

• **Blockbuster + Circuit City = Starbucks?** Retail keeps morphing

almost as much as telecommunications and entertainment delivery services. Down in Dallas, **Blockbuster** is trying out Wi-Fi, lattes and more. Wonder when they'll erect mini-screening rooms?

• **Apple:** OK, I'm a Mac disciple. But, I wonder just how many iPods can co-exist? How many can they sell? And, how many do you have?

• **Bored by the Digital Transition Hype?** Don't be. Play a game with your own television sets... You'll have to waste a little time and a couple of dollars. First get a new digital box (you do still have an analog TV in your house somewhere, don't you?). Don't, though, forget to go to [dtv2009.gov](http://dtv2009.gov) and get a coupon. Head to your favorite Big Box store, take the new box home and hook it up. Then try to get a signal. Should be interesting... nobody really, truly knows what the resulting propagation characteristics will be post-February 17, 2009. There are some good guesses at [antennaweb.org](http://antennaweb.org). Really, this is worth your time... gotta be ready for the big shift next year and you need to know more than your neighbor does.

Paul Maxwell

T: 303/271-9960

F: 303/271-9965

[maxfax@mediabiz.com](mailto:maxfax@mediabiz.com)

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