

# CableFAX Daily™

Tuesday — April 30, 2013

What the Industry Reads First

Volume 24 / No. 083

## NewFrontier: Digital Players Dance to New Beat

The digital NewFronts are in full swing this week, and well... they continue to be a little different. That was showcased quite well Mon during **Microsoft's** NewFront, which included an hour of dancing, contorting and weirdness from Lucent Dossier ("like the darker side of Cirque Du Soleil" boasts its Twitter bio). **Yahoo** was slated to roll out its presentation Mon night, complete with a performance by The Lumineers. **Hulu, Disney Interactive, Google, Vevo** are also all in the NewFront mix. And with the buzz over **Netflix's** "House of Cards" and **Amazon's** push into originals, the spotlight on the relatively new NewFronts this year is blinding. "We see [digital] as a complement to TV. What we want to do at Microsoft is... be sure we're complementing what's happening on TV," said *Scott Ferris*, gm of Microsoft TV/video advertising business group. One example of that is "Years of Living Dangerously," a climate change series from *James Cameron* and *Jerry Weintraub* that debuts on **Showtime** later this year. The linear debut will last 8 weeks, but the Microsoft-partnered digital content will be year-round, said exec producers *David Gelber* and *Joel Bach* (formerly of "60 Minutes"). Back to those dancers: they're part of a show available across Microsoft platforms from **OneBeat**, which calls itself the multimedia home for EDM (electronic dance music for the under 25 crowd). On May 10, Season 2 of animated series "The LeBrons" will debut exclusively on Xbox Live. "We hope it's a giant case study on how you can engage fans and audiences directly," said *Dan Goodman*, co-founder of **Believe Ent Group**. **MSN** is on track to generate 2bln streams of video this year, according to MSN Video exec prod *Adam Berliant*. While it licenses content from 70 different partners, including **Discovery Comm** and **Consumer Reports**, it's stepping up the number of originals. "We have about 30 originals. That's about triple where we were a year ago," Berliant said. "We have potentially 30 more under development, and we're doubling that figure next year." Microsoft unveiled "StageDoor," a MSN entertainment video destination that aggregates trusted video content into 9 distinct channels. Nets with a strong foothold in the TV ecosystem are likely to provide advertisers with strategies for cross-platform integration. Take **Weather Channel**, which at its digital NewFront Mon announced 3 additional cross-platform short film series to debut later this year. Beginning in July, the net will premiere a new series every month, beginning with "Brink," an eco-series about saving species on the brink of extinction, "Destination Uncharted," which features far-flung, uncharted locales, and "Grid Breakers," a series following adventure explorers. The first 3 series of films—all

## STYLE MEETS SUBSTANCE

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released simultaneously at the start of the month and available for successive online viewing—will be sold solely with digital advertising, but “in the fall we’re going to run them on the channel,” *Jeremy Steinberg*, svp, digital ad sales told **CableFAX** after the presentation. That will include “I Am Stoppable” in Oct, featuring athletes who’ve overcome great odds to perform. “We’re going to be running them, not just promoting them, on air,” he said. “That’s where we’re going to wrap a cross-platform sponsor around.” Weather announced a partnership with Twitter at its cable upfront earlier this month, and at the NewFront revealed that **Home Depot** is the first sponsor to hop on board. The sponsored content “will not always be video... but we’re going to be getting the video in front of people during the right weather conditions and the right location... using WeatherFX and our extender platform,” he said. The goal is to take advantage of Weather’s reach across multiple platforms, he said, which consists of 163mln unduplicated users per month.

**CFO Reshuffling: Time Warner Cable** CFO *Irene Esteves* is leaving, less than 2 years since she started in July ’11. *Arthur Minson*, the new CFO starting May 2, rejoined the op from **AOL**. He will report to CEO/chmn *Glenn Britt*. Minson first joined TWC in ’06 as svp, finance and became evp and deputy CFO in ’07. “Irene has played a significant role in the management of the company during the last two years, particularly in the acquisition of Insight and the partnership with **Verizon Wireless**. I speak for all Time Warner Cable employees in wishing her the absolute best in the next phase of her career,” Britt said in a statement.

**M&A: Sprint Nextel** received an OK from its acquirer **SoftBank** to gather info on **DISH**’s merger proposal, Sprint said Mon. However, Sprint doesn’t have approval to “enter into negotiations with DISH.” The carrier’s special committee is currently reviewing DISH’s \$25.5bln proposal. Adding a cash player could help *Charlie Ergen* with its proposal, said **BTIG Research** analyst *Walter Pickeyk*. “**Google** or **Apple** might want to step up before someone derails Ergen’s plans,” he wrote in a blog post. Other potential DISH partners include **DirectTV**, which Pickeyk said has \$3bln of cash and would be at a “competitive disadvantage if Ergen executed on his Sprint/Clearwire vision.” Sprint, a majority shareholder of Clearwire, proposed to acquire the remaining **Clearwire** shares. The combination of Sprint/Clearwire/DISH will have a lot of spectrum, Pickeyk said. Meanwhile, AT&T might consider acquiring DISH because Ergen’s vision for Sprint could be problematic for **AT&T**, he said.

**USF:** If the **FCC** intends to expand the eligible areas to include those lacking 4/1 Mbps service as it works to modify the Connect America Fund Phase I support program, it should lower the amount of support per location significantly below \$775/location, **ACA** said. The reason is the average cost of the locations without 4/1 service that the price cap LECs could serve is well below the average cost of locations without 768/200 service, the group said in a filing.

**Ratings: NFL Net** drew a record 7.1mln viewers over its 3-day coverage of the NFL Draft, up 17% over ’12. **ESPN** said the 15+ hours on ESPN and **ESPN2** delivered a 2.1 US rating (+3% YOY) and an avg 3mln viewers (+4%). Digitally, draft coverage grew to more than 13mln unique viewers (+31%) at NFL Net. Most of that was from mobile properties.

**Deals: Bow Tie Cinemas** agreed to acquire **Cablevision**-owned **Clearview Cinemas** theaters from the op. The deal is expected to close in a few months. Financial terms weren’t disclosed.

**In the States: Vermont Telephone** (VTel) now offers gigabit Internet for \$35 (vs **Google Fiber** at \$70 per month) with its stimulus-funded fiber net. Some 600 Vermont homes have signed up. Google’s Kansas City and Austin networks will be “almost identical to VTel’s, enabling a full gigabit downstream and a full gigabit upstream,” CEO *Michel Guité* said.

**Upfronts: Spike** announced its extensive scripted projects as it works to target a broader general audience. “Our move into scripted special-event series is a major step in the evolution of the brand that now reaches a more balanced audience,” said *Sharon Levy*, evp, original series. “We also see this as a stepping stone to developing original scripted dramatic series.” The 5 projects include “Hit Men,” “Whitey Bulger Project,” “The Lamp,” untitled Benghazi project, and “iHuman” (all wt).

**TVE: Cox** launched its MoviePlex for advanced TV subs, including live linear channels, VOD, and authenticated content.

**NHL:** Starting Tues through June, **NBC Sports Net**, **NHL Network** and other **NBC** nets will televise up to 105 **NHL** Stanley Cup playoff games. Live streaming will also be available. NBC Sports’ regional nets, including **Comcast SportsNet** Chicago, Mid-Atlantic and New England, will feature live-event and/or news coverage. -- **MSG Networks** will have exclusive local telecasts of 6 of the 7 potential NHL playoff games, including Game 1, in both the Rangers-Capitals and the Islanders-Penguins ’13 Eastern Conference Quarterfinals series.

# BUSINESS & FINANCE

**Programming:** The Huffington Post's Internet channel, HuffPost Live, will be carried for 6 hours a day by **AXS TV** (nee **HDNet**) starting May 13 (10am-4pm). *The NY Times* reported that the Post isn't paying for distribution, and AXS isn't paying for the programming. -- **RLTV** debuts new weekly series "Bookmark," hosted by former **CNN** anchor *Daryn Kagan*, May 17, 10pm ET. The series explores the culture and world of books, with author interviews, quirky aspects of literary culture and more. -- **Wetv** greenlit new original series "House of Curves," which premieres June 13. -- **Hallmark** started the production of its original film "Banner 4th of July," which premieres June 29. -- **TLC's** new special "Twisted & Listed" will premiere May 4. -- **Oxygen's** docu-series "I'm Having Their Baby" returns June 12. -- *Sarah Silverman* got her first **HBO** comedy special. "Sarah Silverman: We Are Miracles" will be in association with "Funny or Die" and debut this fall. -- **Lifetime's** new scripted comedy "Pretty Wicked Moms" will premiere June 4.

**People:** TV vet *Gary Auerbach* was named evp, dev & programming for **Wilshire Studios**, formerly **Comcast Ent Studios**. He starts on Wed, leaving **Go Go Lucky Ent**, where he was founder and partner. -- **Telemundo** named *Mario Ruiz* as svp, talent dev and strategy. -- Media engagement firm **Shazam** appointed **Yahoo** vet *Rich Riley* CEO and *Andrew Fisher* as exec chmn.

## CableFAX Daily Stockwatch

| Company                      | 04/29 Close | 1-Day Ch | Company               | 04/29 Close | 1-Day Ch |
|------------------------------|-------------|----------|-----------------------|-------------|----------|
| <b>BROADCASTERS/DBS/MMDS</b> |             |          |                       |             |          |
| DIRECTV:                     | 57.15       | 0.82     | CONVERGYS:            | 16.63       | 0.20     |
| DISH:                        | 40.56       | 0.57     | CSG SYSTEMS:          | 21.45       | 0.21     |
| DISNEY:                      | 63.00       | 1.13     | ECHOSTAR:             | 38.91       | (0.22)   |
| GE:                          | 22.27       | 0.06     | GOOGLE:               | 819.06      | 17.64    |
| NEWS CORP:                   | 31.07       | (0.13)   | HARMONIC:             | 5.69        | (0.02)   |
| <b>MSOS</b>                  |             |          |                       |             |          |
| CABLEVISION:                 | 14.99       | 0.19     | INTEL:                | 23.76       | 0.36     |
| CHARTER:                     | 101.62      | (0.02)   | JDSU:                 | 13.59       | 0.15     |
| COMCAST:                     | 41.49       | 0.12     | LEVEL 3:              | 19.51       | (0.33)   |
| COMCAST SPCL:                | 39.36       | 0.10     | MICROSOFT:            | 32.61       | 0.82     |
| GCI:                         | 9.49        | 0.01     | RENTRAK:              | 22.53       | (0.08)   |
| LIBERTY GLOBAL:              | 73.29       | (0.32)   | SEACHANGE:            | 10.79       | 0.06     |
| LIBERTY INT:                 | 20.98       | 0.18     | SONY:                 | 16.56       | 0.08     |
| SHAW COMM:                   | 22.43       | 0.14     | SPRINT NEXTEL:        | 7.12        | UNCH     |
| TIME WARNER CABLE:           | 94.23       | 0.80     | TIVO:                 | 11.57       | 0.02     |
| VIRGIN MEDIA:                | 49.13       | (0.17)   | UNIVERSAL ELEC:       | 21.59       | (0.16)   |
| WASH POST:                   | 444.25      | (2.12)   | VONAGE:               | 3.03        | UNCH     |
| <b>PROGRAMMING</b>           |             |          |                       |             |          |
| AMC NETWORKS:                | 63.65       | 0.22     | YAHOO:                | 24.43       | (0.25)   |
| CBS:                         | 46.28       | 0.01     | <b>TELCOS</b>         |             |          |
| CROWN:                       | 2.05        | UNCH     | AT&T:                 | 37.30       | 0.26     |
| DISCOVERY:                   | 78.83       | (0.38)   | VERIZON:              | 53.46       | (0.17)   |
| GRUPO TELEVISIA:             | 25.28       | (0.12)   | <b>MARKET INDICES</b> |             |          |
| HSN:                         | 52.93       | (0.05)   | DOW:                  | 14818.75    | 106.20   |
| INTERACTIVE CORP:            | 45.71       | (0.39)   | NASDAQ:               | 3307.02     | 27.76    |
| LIONSGATE:                   | 24.68       | 0.34     | S&P 500:              | 1593.61     | 11.37    |
| OUTDOOR:                     | 8.75        | 0.02     |                       |             |          |
| SCRIPPS INT:                 | 66.39       | (0.27)   |                       |             |          |
| STARZ:                       | 23.46       | 0.17     |                       |             |          |
| TIME WARNER:                 | 60.13       | 0.46     |                       |             |          |
| VALUEVISION:                 | 4.14        | (0.07)   |                       |             |          |
| VIACOM:                      | 64.43       | 0.08     |                       |             |          |
| WWE:                         | 9.15        | (0.02)   |                       |             |          |
| <b>TECHNOLOGY</b>            |             |          |                       |             |          |
| ADVANTAGE:                   | 2.40        | 0.04     |                       |             |          |
| ALCATEL LUCENT:              | 1.33        | (0.05)   |                       |             |          |
| AMDOCS:                      | 34.97       | 0.01     |                       |             |          |
| AMPHENOL:                    | 74.90       | 0.60     |                       |             |          |
| AOL:                         | 39.05       | 0.01     |                       |             |          |
| APPLE:                       | 430.12      | 12.91    |                       |             |          |
| ARRIS GROUP:                 | 16.37       | (0.02)   |                       |             |          |
| AVID TECH:                   | 6.71        | (0.05)   |                       |             |          |
| BLNDER TONGUE:               | 0.99        | (0.01)   |                       |             |          |
| BROADCOM:                    | 35.41       | 0.88     |                       |             |          |
| CISCO:                       | 20.98       | 0.31     |                       |             |          |
| CLEARWIRE:                   | 3.44        | UNCH     |                       |             |          |
| CONCURRENT:                  | 6.78        | (0.02)   |                       |             |          |

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