

# CableFAX Daily™

Wednesday — May 18, 2011

What the Industry Reads First

Volume 22 / No. 095

## Upfrontly Speaking: Football, Split Screens & the X Factor

Yes, this is Broadcast Upfront week, but Tues also marked the upfront for cable's most expensive network. **ESPN** evp, content *John Skipper* told media buyers he knew what would happen with the NFL lockout. "They're going to play," he declared from the stage. Only problem is, he doesn't know when. "When they do, we'll show it on Mon night. I don't know when, but we hope it's this year because we have a terrific schedule," Skipper said. But even if there is a lockout, Skipper painted the net as having enough NFL content to keep football fans interested. "Fans will always want to know what's happening around the NFL. No one has the game around the games, or heaven forbid the game around the non-games, like we do," he said. ESPN announced it will use the 2nd half of its broadcast of the 10 races in the Chase for the **Sprint** Cup Championship for split-screen commercial breaks so fans can keep watching the action. **NASCAR** is the only significant sport that leaves the action for commercials, Skipper said. **Fox** surprised fans Sun by using a split-screen during its final commercial break—a first for the net. **TNT** uses a split screen for the July Daytona race. ESPN also used its upfront to announce that beginning in '13, the X Games will expand to include 6 events around the world (2 in the US). ESPN will conduct a formal bidding process to determine the X Games host cities for a 3-year agreement. "Watch ESPN"—its live viewing app for PCs, tablets and smart phones currently available on **Time Warner Cable**, **Bright House** and **FiOS**—this fall will launch custom-built creative that takes advantage of the format. Sold separately, the spots will run on select programming in Oct (college football, college basketball and "SportsCenter:"). "Technology is called the great disrupter, but at ESPN, it's an enabler," said *Sean Bratches*, ESPN evp, sales and marketing. ESPN's critically acclaimed "30 for 30" series in Dec has evolved into ESPN Films, with upcoming docs to include features on transgender athlete *Renee Richard* and former speed skater *Johann Olav Koss*. There will be short films on women—"HERoics"—leading up to the women's World Cup on ESPN 2 and women's Website **espnW** starting June 25. Also worth noting: **ESPN Deportes** debuts its 1st original scripted series, "El Diez" (a pro soccer player who comes to Mexico City) in the fall.

**Patently Offensive:** A federal court invalidated 2 **Verizon** patent claims that the telco filed in a countersuit against **ActiveVideo** in their patent-infringement battle. ActiveVideo filed a lawsuit in May '10 against Verizon, claiming it was infringing upon 5 of its patents. ActiveVideo's suit came after Verizon sued its client **Cablevision** in Mar '10, alleging infringement of 5 set-top related patents and filed complaints with the US Intl Trade Commission. One of the patents the US District Court for the Eastern District of VA invalidated was included in the suit against Cablevision. "Obviously we're pleased at the elimination of Verizon's claims against our company, but it is equally important that the ruling removes claims by Verizon against our customer, Cablevision," said ActiveVideo pres/CEO *Jeff Miller*, adding that he's confident the company will recover damages from Verizon and enjoin it from using ActiveVideo patented technology. A trial is set for July 12. Verizon declined comment.

NEARLY  
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# CableFAX Daily™

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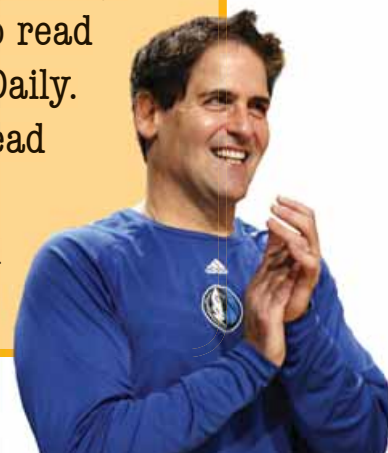
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If you want to follow the cable industry, you have to read CableFAX Daily. My must read every day.

— Mark Cuban  
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**Wireless:** **Cox** officially launched its mobile phone and wireless Internet service across RI and communities it serves in CT and Cleveland, OH, Tues. With the product already available in Hampton Roads, VA; Omaha, NE; Orange County, CA; and Oklahoma City and Tulsa, OK, Cox plans to have Cox Wireless available to more than half its footprint by year-end.

**By the Numbers:** The 19 largest cable/phone providers added nearly 1.3mln HSD subs in 1Q11, for a total of 76.6mln subs (42.6mln cable subs, 34mln telco), reports **Leichtman Research**. **Comcast's** 418K 1Q broadband subs marked the most in any Q since 1Q08. Top cable cos added more than 850K subs, or 67% of net broadband additions for the Q.

**Customer Satisfaction:** **Verizon FiOS** holds the top spot in the **American Consumer Satisfaction Index** for the 2nd consecutive year, even though its score dipped by 1% to 72. **DirecTV** was 2nd at 69 (+1%). While **AT&T's** U-Verse took 3rd place at 68, it suffered a 6% drop over last year. **DISH** also fell 6% to 67. Where is cable in all this? **Cox** was the highest-scoring MSO, notching the same score as last year (67) and tying it with 4th place **DISH**. **Comcast** (-3%), **Time Warner Cable** (-3%), and **Charter** (-2%) are all tied at the bottom of the industry with ACSI scores of 59. The ACSI put the score for "All Others" (potentially hundreds of smaller companies not broken out) at 69, down 1.4%. In the fixed-line phone service arena, smaller local and long distance providers, which include companies like **Vonage** and **Frontier**, led with a score of 76. **Qwest** was 2nd with a 73 (+1%), followed by **Cox's** 72 (-3%). **AT&T** dropped 5% to 71 and **Verizon** fell 3% to 71.

**At the Portals:** **FCC** chmn **Julius Genachowski** appointed **Renata Hesse** as sr counsel to the chmn for the **AT&T-Mobile** transaction. Hesse (no relation to **Sprint** CEO **Dan Hesse**) is currently a partner in the DC office of **Wilson Sonsini Goodrich & Rosati**. -- **ACA** told the **FCC** this week that it shouldn't take into account a recent decision regarding a **Time Warner Cable** petition when it considers the cable group's request to block the sale of **ABC** Topeka affil **KTKA** (owned by **Free State**) to **PBC Broadcasting**. The Media Bureau denied **Time Warner Cable's** petition to prevent **LIN TV's** purchase of **Acme Comm's** **WCWF** in Suring, WI, as well as **Vaughn Media's** purchase of Acme's **WBBDT**. The MSO cited potential harms from retrans consent negotiations for multiple stations in the same DMA, but the Media Bureau said TWC's concerns were "speculative." In a filing Mon, ACA said it's concerned about a virtual "triopoly" in Topeka for the stations in question—and noted that they are Big 4 affiliates, not **CW** affils as in the TWC petition. ACA wants the FCC to block or condition the sale of **KTKA** because it says **PBC** has a "track record of creating local market TV station duopolies for the purpose of gaining under bargaining leverage." Topeka's **NBC** affil and **Fox** affil are owned by **New Vision TV**, which ACA claims **PBC** jointly negotiates retrans.

**Ratings:** **NBA** playoff coverage easily handed **TNT** the #1 spot in prime cable last week, with the net averaging a 3.2 HH rating/3.21mln HHs. **USA** was 2nd (2.2/2.17mln) followed by **Disney** (1.7/1.65mln), **ESPN** (1.5/1.48mln), **Fox News** (1.4/1.42mln) and **History** (1.4/1.35mln). **Brag Book:** The 5th ep of **HBO's** "Game of Thrones" averaged 2.6mln viewers Sun night (3.3mln when you combine the 11pm rebroadcast—a series high for the combined plays). -- **Discovery's** "Killing Bin Laden" delivered 2.42mln viewers Sun night, with the net reporting that it is the most-watched cable doc about his demise. It was the night's #1 non-fiction ad-support cable program among men 25-54 behind **NBA** and **MLB** games. -- **The Hub's** "R.L. Stine's The Haunting Hour" marathon on Fri the 13th delivered the net's best-ever Fri prime performance among kids 2-11 (126K) and kids 6-11 (106K).

**Programming:** **Tennis Channel** will offer French Open coverage in 3D. **AT&T U-Verse**, **Comcast** and **DirecTV** will

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# BUSINESS & FINANCE

telecast all matches from center court in 3D, May 28-30. It will be the 1st U.S. viewing of the French Open in 3D.

**Public Affairs:** DISH has dedicated 2 on-demand channels (1 and 501) to solicit donations from customers to provide disaster relief assistance in the US and Japan. Subs can follow on-screen directions to make a \$5 donation that will be added to their subsequent monthly bill.

**Weather Report:** Notice several Weather Channel-branded umbrellas on the streets of NY this week? With broadcast upfront presentations this week coinciding with torrential downpours, Weather Channel brilliantly organized a large umbrella drop at several major ad agencies.

**Honors:** Cox evp, chief people officer Mae Douglas will receive the Friend of NAMIC award at the organization's annual breakfast, June 16, Chicago.

**Business/Finance:** BlackArrow secured a strategic investment from Time Warner Cable that results in TWC media sales pres Joan Gillman joining the advanced ad solutions co's board. TWC's investment and the Motorola Mobility investment from last Nov bring BlackArrow's previously announced Series C funding to \$20mln from \$27mln. Other investors include Cisco, Comcast Interactive Capital and Intel Capital. BlackArrow said the TWC capital will be used for further product innovation and deployment of its advanced advertising system.

## CableFAX Daily Stockwatch

Company	05/17 Close	1-Day Ch	Company	05/17 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
DIRECTV:	49.29	0.03	BLNDER TONGUE:	1.90	(0.05)
DISH:	28.89	(0.01)	BROADCOM:	33.08	(0.28)
DISNEY:	41.01	0.08	CISCO:	16.64	0.04
GE:	19.59	(0.17)	CLEARWIRE:	4.27	0.13
NEWS CORP:	18.03	0.03	CONCURRENT:	6.11	0.16
<b>MSOS</b>					
CABLEVISION:	33.36	(1.04)	CONVERGYS:	13.27	(0.07)
CHARTER:	56.18	(1.59)	CSG SYSTEMS:	19.02	(0.19)
COMCAST:	25.02	0.31	ECHOSTAR:	32.41	(0.03)
COMCAST SPCL:	23.51	0.18	GOOGLE:	530.46	12.04
GCI:	11.49	0.34	HARMONIC:	7.55	0.06
KNOWLOGY:	14.92	0.10	INTEL:	23.55	(0.09)
LIBERTY CAPITAL:	84.73	(0.23)	JDSU:	19.69	(0.66)
LIBERTY GLOBAL:	44.76	(0.77)	LEVEL 3:	1.84	(0.01)
LIBERTY INT:	17.42	(0.12)	MICROSOFT:	24.52	0.11
SHAW COMM:	20.66	0.13	RENTRAK:	20.74	(0.3)
TIME WARNER CABLE:	76.57	0.02	SEACHANGE:	9.66	(0.07)
VIRGIN MEDIA:	31.91	0.59	SONY:	28.07	0.25
WASH POST:	417.51	1.71	SPRINT NEXTEL:	5.11	UNCH
<b>PROGRAMMING</b>					
CBS:	26.06	0.57	THOMAS & BETTS:	55.53	(0.79)
CROWN:	1.98	(0.13)	TIVO:	9.31	0.02
DISCOVERY:	43.84	0.21	UNIVERSAL ELEC:	26.05	(0.12)
GRUPO TELEVISA:	23.18	0.01	VONAGE:	4.41	(0.19)
HSN:	32.10	(0.51)	YAHOO:	16.00	0.19
INTERACTIVE CORP:	34.20	0.02	<b>TELCOS</b>		
LIBERTY:	41.62	0.10	AT&T:	31.12	0.06
LIBERTY STARZ:	74.24	(0.3)	VERIZON:	37.11	0.14
LIONSGATE:	5.96	(0.06)	<b>MARKET INDICES</b>		
LODGENET:	3.27	(0.04)	DOW:	12479.58	(68.79)
NEW FRONTIER:	1.61	(0.02)	NASDAQ:	2783.21	0.90
OUTDOOR:	6.32	(0.28)	S&P 500:	1328.98	(0.49)
SCRIPPS INT:	50.31	(0.01)			
TIME WARNER:	35.83	0.62			
VALUEVISION:	6.02	(0.02)			
VIACOM:	58.02	0.12			
WWE:	10.34	UNCH			
<b>TECHNOLOGY</b>					
ADDVANTAGE:	2.61	0.01			
ALCATEL LUCENT:	5.73	(0.19)			
AMDOCS:	29.36	0.13			
AMPHENOL:	54.60	(0.45)			
AOL:	18.74	(0.02)			
APPLE:	336.14	2.84			
ARRIS GROUP:	10.71	(0.06)			
AVID TECH:	16.75	(0.27)			
BIGBAND:	2.19	UNCH			

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