

CableFAX Daily™

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What the Industry Reads First

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At the Half: World Cup Already a Trophy for US Nets

As the **World Cup** advances to the elimination round after 2 weeks of play, both **ESPN** and **Univision** earned an important goal that neither could influence. The US team's advance keeps alive ESPN/ABC's biggest draw so far, and ditto for Univision and the Mexican team—though both are likely to benefit anyway as the world's top squads and players move toward meetings on South African pitches. Yet audience data from the previous fortnight shows that ESPN and Univision have already achieved great success. The Wed US-Algeria match on ESPN, for example, frayed fans' nerves as well as soccer records by becoming the sports giant's highest-rated and most-watched futbol game in history with a 4.6/4.58mln and 6.16mln total viewers. And the eclipsed record was but 5 days old, having been set with the US-Slovenia match on Jun 18. Meanwhile, the Mexico-South Africa match on Jun 11 became Univision's most-watched opening day match ever with 5.4mln total viewers, and later, on Jun 17, the Mexico-France match garnered 5.8mln total viewers to become the net's most-watched match so far this tourney (the US has also performed well on Univision). These superlatives, mind you, are just a taste of the forceful and festive flavor brought to US TV by the Cup. An avg of 11.1mln viewers caught the English and Spanish-language broadcasts of each USA matches thus far, according to **Nielsen**, up an impressive 68% over the comparative 3 in '06. "The numbers are even more impressive when you consider that two of these games were played on weekday mornings, when many viewers are at work," wrote Nielsen vp, sports *Stephen Master* in a blog post. Through Jun 23 and 40 games across ABC, ESPN and **ESPN2**, Cup matches averaged a 1.8 HH rating, up 40% over '06. Through 44 matches, Univision averages approx 1.9mln viewers. But alternate platforms could become the biggest storyline once the tourney ends. **ESPN3.com** attracted nearly 1.1mln uniques for the US-Algeria match, with those uniques spending an avg of 43min at the site. Through 14 Cup days, the site has hosted 5mln viewers who consumed more than 9.2mln total hours. **ESPNSoccernet.com** also benefitted, setting Wed an all-time record for most daily visits with 8.8mln. **Univision Interactive Media**, meanwhile, continues to set record traffic every day, with users consuming nearly 200mln total pages across platforms with more than 25.5mln visits. **UnivisionFutbol.com** users alone watched nearly 1.9mln total hours of live match streaming during the past week. The next 2 weeks should continue to alter US Cup usage trends across platforms, so look for a comprehensive World Cup wrap up from **Cfax** shortly after the champion is crowned.

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THE MAGAZINE



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2010 Selections of Top Operators*



NewWave Communications as Independent Operator of the Year Award presented in partnership with ACA and NCTC & **Cablevision as MSO of the Year**

Honorees Celebrated in this Issue:

Lifetime Achievement (Independent): Tom Gleason, NewWave Communications and Pat Thompson, RBC Daniels
System Executive of the Year (Independent): Charlotte McClure, Cable One
Customer Service (Independent): WOW!

Lifetime Achievement (MSO): Bonnie Hathaway, Time Warner Cable
Customer Care / Customer Service (MSO) Award : Suzanne Foy, Cox
Commercial Sales Team of the Year (MSO): MidContinent

More category winners celebrated in CableFAX: The Magazine Top Ops Issue

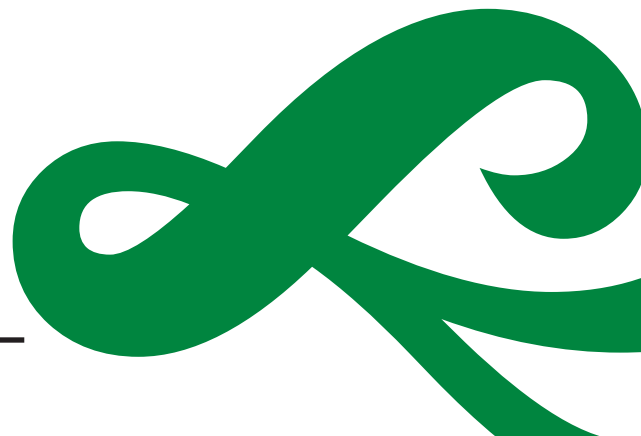
Bonus Distribution: The Independent Show in Baltimore, MD

We invite you to celebrate your most important partners' successes and your achievements with a brand ad or a congratulatory ad in the July, Top Ops issue of CableFAX: The Magazine. Call us for a full list of all the honorees as well as for advertising packages.

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Network Moves: Steve Schiffman was upped to pres, **National Geographic Channel** and **Nat Geo WILD**. He'll continue to report to NGC CEO *David Haslingden*. Schiffman has been serving as evp, gm of NGC since '07. This year, he added the newly stateside Nat Geo WILD to his purview. "Going forward, I expect that Steve will help propel National Geographic Channels-US toward even greater milestones, including expanding our business with various line extensions and across diverse platforms," said Haslingden. -- *David Nevins*, pres of production company **Imagine TV**, is widely expected to replace **Showtime's Robert Greenblatt**, who is reportedly stepping down as the pay TV's ent pres after 7 years. Word is Greenblatt, who has been behind a slate of successful shows for Showtime, wants to go, and his contract expires next month. Showtime declined comment on the story, which was all over the Hollywood trades Fri.

Terrestrial Talk: FCC chmn *Julius Genachowski* defended why terrestrially delivered RSNs, not news and other channels, are the focus of new procedures for program access complaints related to terrestrial nets. His response came in a letter, released Fri, to Rep *Albio Sires* (D-NJ), who doesn't believe the process for resolving complaints should contain any presumptions about particular types of programming. "The Report and Order explains that it is unlikely that an unfair act involving local news and local community or educational programming, due to its replicable nature, will have the purpose or effect of significantly hindering or preventing the MVPD from providing satellite cable or satellite broadcast programming," Genachowski wrote. Meanwhile, the complaint process, which was put in place Mon, is officially teeing up. **AT&T** sent **MSG** and **Cablevision** a letter Thurs, saying that it intends to submit a formal complaint to the FCC in 10 days if they don't agree to negotiate in good faith for **MSG HD** and **MSG Plus HD**. AT&T's **U-Verse** does have deals for the SD programming. Cablevision has asked a federal court to review the FCC's new rules. An MSG statement didn't sound especially promising for AT&T: "MSG complies with federal regulations. We are pleased to have AT&T as a customer, and to provide U-Verse subscribers in CT with access to every single game on MSG and MSG Plus." **DirecTV** and **DISH** have recently requested **CSN Philly** from **Comcast**. "We recently received carriage requests from both of them and as is the normal course we'll evaluate and respond accordingly," a CSN spokesman said.

Still Going: In Apr, Sens *Richard Burr* (R-NC) and *Kay Hagan* (D-NC) and 4 NC Reps sent letters to the **FCC** asking for a resolution to the **MASN-Time Warner Cable** carriage dispute in NC that stretches back to '07. The FCC Media Bureau recently prepared a revised draft decision on Time Warner's request for a review of a Media Bureau order affirming an arbitrator's decision mandating carriage of MASN, FCC chmn *Julius Genachowski* revealed in his response dated May 28 (letter was released by the FCC Fri). "I hope to resolve this matter as quickly as possible," he wrote.

Retrans: Known for doubts over the **FCC's** authority to reform retrans, FCC commish *Robert McDowell* on Fri told broadcasters that the Commission should "think twice" before taking any action that might interfere with the process. In addition to questioning statutory authority, he said the correlation between retrans fees and higher cable prices for consumers is unclear. "According to at least one study of relatively recent vintage, one third of a consumer's cable bill is attributable to programming costs and less than two percent of that bill is attributable to retransmission consent fees," he said in a speech Fri at the **VA Assn of Broadcasters** convention. The study he referenced was from **Navigant Economics' Jeffrey Eisenach** on behalf of **Disney**. **Time Warner Cable** questioned Eisenach's conclusions by filing reports from **Charles River Assoc** earlier this month (*Cfax*, 6/3). CRA called the analysis "fundamentally flawed." Proving that this can go on forever, Disney filed a response from Navigant this week claiming that CRA failed to contradict its earlier findings and ignored various facts.

Online: **ESPN** argues the nearly 1.1mln uniques garnered by **ESPN3.com** for the Wed US-Algeria match marks the largest US audience ever for a sports event on the Web, but **CBS** believes it still holds the record. Citing data from **Akamai**, CBS said ESPN wrongly assumed that online usage of **March Madness On Demand** peaked for the Duke-Butler final (557K uniques), when in fact an earlier tourney game featuring Florida-BYU notched the greatest number of uniques at 1.12mln. The top 5 in the metric is completed, said CBS, by MMOD's Robert Morris-Villanova (1mln), Murray State-Vanderbilt (751K) and ESPN3's US-Slovenia (750K). ESPN, however, stood its ground on Fri, saying ESPN3.com measured both uniques and time spent to arrive at its largest-audience measure, while CBS' "more limited approach" only factored in uniques.

Marketing: **Showtime** is using social networking (**Twitter**, **Facebook**, **foursquare**), **SHO.com** and "The Real L Word" iPhone app to help launch the unscripted series. Before and during each ep, fans can share comments and join the case and producers for live commentary on The Real L Word Live Lounge.

CableFAX Week in Review

Company	Ticker	6/25 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
DIRECTV:	DTV	35.83	(4.27%)	7.44%
DISH:	DISH	19.75	(7.32%)	(4.91%)
DISNEY:	DIS	33.48	(4.75%)	3.81%
GE:	GE	14.91	(6.52%)	(1.45%)
NEWS CORP:	NWS	14.52	(9.48%)	(8.79%)
MSOS				
CABLEVISION:	CVC	24.09	(4.44%)	(6.7%)
COMCAST:	CMCSA	17.67	(4.54%)	4.80%
COMCAST SPCL:	CMCSK	16.70	(5.01%)	4.31%
GCI:	GNCMA	7.56	11.50%	18.50%
KNOLOGY:	KNOL	11.76	1.38%	7.69%
LIBERTY CAPITAL:	LCAPA	44.23	5.86%	85.22%
LIBERTY GLOBAL:	LBTYA	26.69	0.00%	21.93%
LIBERTY INT:	LINTA	11.78	(4.62%)	8.67%
MEDIACOM:	MCCC	6.93	1.17%	55.03%
RCN:	RCNI	14.82	0.14%	36.59%
SHAW COMM:	SJR	18.63	(4.27%)	(9.43%)
TIME WARNER CABLE:	TWC	54.20	(1.74%)	30.95%
VIRGIN MEDIA:	VMED	17.15	(2%)	1.90%
WASH POST:	WPO	432.55	(5.54%)	(1.6%)

Company	Ticker	6/25 Close	1-Week % Chg	YTD %Chg
PROGRAMMING				
CBS:	CBS	14.13	(5.36%)	0.57%
CROWN:	CRWN	1.71	(3.39%)	17.93%
DISCOVERY:	DISCA	37.63	(4.15%)	22.69%
GRUPO TELEVISIA:	TV	18.05	(4.75%)	(13.05%)
HSN:	HSNI	25.39	1.97%	25.76%
INTERACTIVE CORP:	IACI	23.00	(1.03%)	12.30%
LIBERTY:	L	33.88	(0.06%)	(6.8%)
LIBERTY STARZ:	LSTZA	54.45	3.87%	17.98%
LIONSGATE:	LGF	7.27	2.97%	25.13%
LODGENET:	LNET	4.07	(15.21%)	(26.4%)
NEW FRONTIER:	NOOF	1.58	(9.71%)	(16.4%)
OUTDOOR:	OUTD	4.58	(14.07%)	(21.03%)
PLAYBOY:	PLA	4.18	11.17%	30.63%
SCRIPPS INT:	SNI	43.30	(4.46%)	4.34%
TIME WARNER:	TWX	30.76	(6.67%)	5.56%
VALUEVISION:	VVTV	1.90	(4.04%)	(60.42%)
VIACOM:	VIA	37.96	(3.9%)	20.51%
WWE:	WWE	16.26	(1.39%)	6.07%

Company	Ticker	6/25 Close	1-Week % Chg	YTD %Chg
TECHNOLOGY				
ADC:	ADCT	7.67	(4.01%)	23.51%
ADVANTAGE:	AEY	2.97	(3.88%)	50.76%
ALCATEL LUCENT:	ALU	2.76	(2.82%)	(16.87%)
AMDOCS:	DOX	27.08	(4.07%)	(5.08%)
AMPHENOL:	APH	41.41	(2.88%)	(10.33%)
AOL:	AOL	21.96	(3.43%)	(5.67%)
APPLE:	AAPL	266.70	(2.69%)	26.56%
ARRIS GROUP:	ARRS	10.65	(2.83%)	(6.82%)
AVID TECH:	AVID	13.34	0.08%	4.55%
BIGBAND:	BBND	2.90	(1.36%)	(15.7%)
BLNDER TONGUE:	BDR	1.26	(8.7%)	10.53%
BROADCOM:	BRCM	34.42	(2.8%)	9.37%
CISCO:	CSCO	22.18	(5.57%)	(7.34%)
CLEARWIRE:	CLWR	7.70	1.05%	13.91%

Company	Ticker	6/25 Close	1-Week % Chg	YTD %Chg
COMMSCOPE:	CTV	25.56	(3.77%)	(3.66%)
CONCURRENT:	CCUR	5.15	0.98%	30.05%
CONVERGYS:	CVG	10.24	(3.21%)	(4.74%)
CSG SYSTEMS:	CSGS	19.46	(3.62%)	1.94%
ECHOSTAR:	SATS	19.79	(4.95%)	(1.74%)
GOOGLE:	GOOG	472.68	(5.47%)	(23.76%)
HARMONIC:	HLIT	5.94	2.77%	(6.01%)
INTEL:	INTC	20.03	(6.39%)	(1.8%)
JDSU:	JDSU	11.08	(4.65%)	34.30%
LEVEL 3:	LVLTL	1.19	(1.45%)	(22.06%)
MICROSOFT:	MSFT	24.53	(7.21%)	(19.51%)
MOTOROLA:	MOT	7.07	(2.62%)	(8.89%)
RENTRAK:	RENT	25.26	(0.86%)	42.95%
SEACHANGE:	SEAC	8.88	4.10%	35.37%
SONY:	SNE	27.33	(2.15%)	(5.76%)
SPRINT NEXTEL:	S	4.20	(8.5%)	14.75%
THOMAS & BETTS:	TNB	36.79	(8.28%)	2.79%
TIVO:	TIVO	7.40	(7.27%)	(27.31%)
TOLLGRADE:	TLGD	6.42	(1.98%)	5.07%
UNIVERSAL ELEC:	UEIC	18.26	(2.61%)	(21.36%)
VONAGE:	VG	2.53	(5.95%)	80.71%
YAHOO:	YHOO	14.81	(4.71%)	(11.76%)

Company	Ticker	6/25 Close	1-Week % Chg	YTD %Chg
TELCOS				
AT&T:	T	24.79	(2.52%)	(11.56%)
QWEST:	Q	5.27	(2.41%)	25.18%
VERIZON:	VZ	28.55	(1.99%)	(13.82%)

Index	Value	% Chg	YTD %Chg
DOW:	10143.81	(2.94%)	(2.73%)
NASDAQ:	2223.48	(3.74%)	(2.01%)

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. GCI:	7.56	11.50%
2. PLAYBOY:	4.18	11.17%
3. LIBERTY CAPITAL:	44.23	5.86%
4. SEACHANGE:	8.88	4.10%
5. LIBERTY STARZ:	54.45	3.87%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. LODGENET:	4.07	(15.21%)
2. OUTDOOR:	4.58	(14.07%)
3. NEW FRONTIER:	1.58	(9.71%)
4. NEWS CORP:	14.52	(9.48%)
5. BLNDER TONGUE:	1.26	(8.7%)



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