

# CableFAX Daily™

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What the Industry Reads First

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## Springtime Delivery: 18-49s Moving to Cable On Help of Non-Fiction Content

2Q ratings numbers show 18-49s continue to abandon broadcast and often end up at cable's door—along with major ad dollars. The Big 4 shed an avg of 6% in the demo during 2Q (through 6/19) and 9% during the '10-'11 season, according to **Turner's** analysis of Nielsen data, while ad-supported cable posted 3% gains in each period and the top 10 ad-supported ent nets bumps of 4% and 6%, respectively. Cable controlled approx 68% of the 18-49 share in 2Q, up from 67% a year ago and 56% in '05. Myriad genres have accounted for the migration. "Cable's growth continues as a result of greater investment in programming," said Turner research chief *Jack Wakshlag*. "Looking over the course of time, movies and kids programming migrated first. Then, news and most recently big time sports. The last to migrate were top-flight scripted shows, and they have increased and flourished on cable." Notable is how data highlight non-fiction programming as some of the tastiest bait used by cable to lure 18-49s—at least from Apr-June—with sports providing the muscle. Consider: in each of the 11 weeks ending June 19, at least 8 non-fiction telecasts were among cable's weekly top 10 in 18-49 viewership (Live+SD), according to **Nielsen**, and no fiction entry ranked higher than 3rd in any week. That **TNT's** "Fallen Skies" nabbed the lone 3rd merely offers a few bonus points to the net, which like **ESPN** and other channels is reaping the dual benefits of sports content: 18-49 viewership and live viewing. TNT's coverage of the **NBA** playoffs notched the top 4 telecasts of 2Q among 18-49s with draws ranging from 5.83mln-6.12mln, and the demo also powered those same telecasts to the total viewership apex in the quarter. Of the top 100 2Q telecasts for total viewership, fiction accounts for just 16 spots. The NBA on TNT and ESPN contributed heavily to non-fiction's win, but other franchises, particularly **History's** "Pawn Stars" and **WWE** action on **USA**, were well represented on that list and also cater mostly to 18-49s. Moreover, 8 non-fiction shows including leader "Pawn," **Comedy Central's** "Tosh.0" and **Discovery Channel's** "Deadliest Catch" dominated the list of top returning 2Q prime original shows among 18-49s, according to Turner, and all but 1 (History's "American Pickers") received the majority of total viewership from the demo. Per Nielsen, the top 5 nets in YOY growth in 2Q prime among 18-49s (at least 100K total) were **Investigation Discovery** (+64%), **History** (+35%), **BBC America** (+29%), **CNN** (+28%) and **MTV** (+20%). Notice a pattern there? Fictional content typically regains a lot of popularity in 3Q due to cable's summer original series cascade, so don't discount scripted dramas and comedies as also-rans. After all, ent nets **USA** (3.01mln) and **Disney** (2.55mln) scored 1st and 3rd, respectively, in 2Q prime total viewership, and the former also ranked 2nd among 18-49s. Not surprisingly, however, TNT easily ruled that demo with an NBA assist, while History, ESPN and **TBS** completed the top 5.

**Retrans Redux:** More retrans reply comments were filed at the **FCC** (*Cfax*, 6/28) after our deadline Mon, including remarks from the **NFL**. Agreeing with broadcasters that the retrans consent process works just fine, the

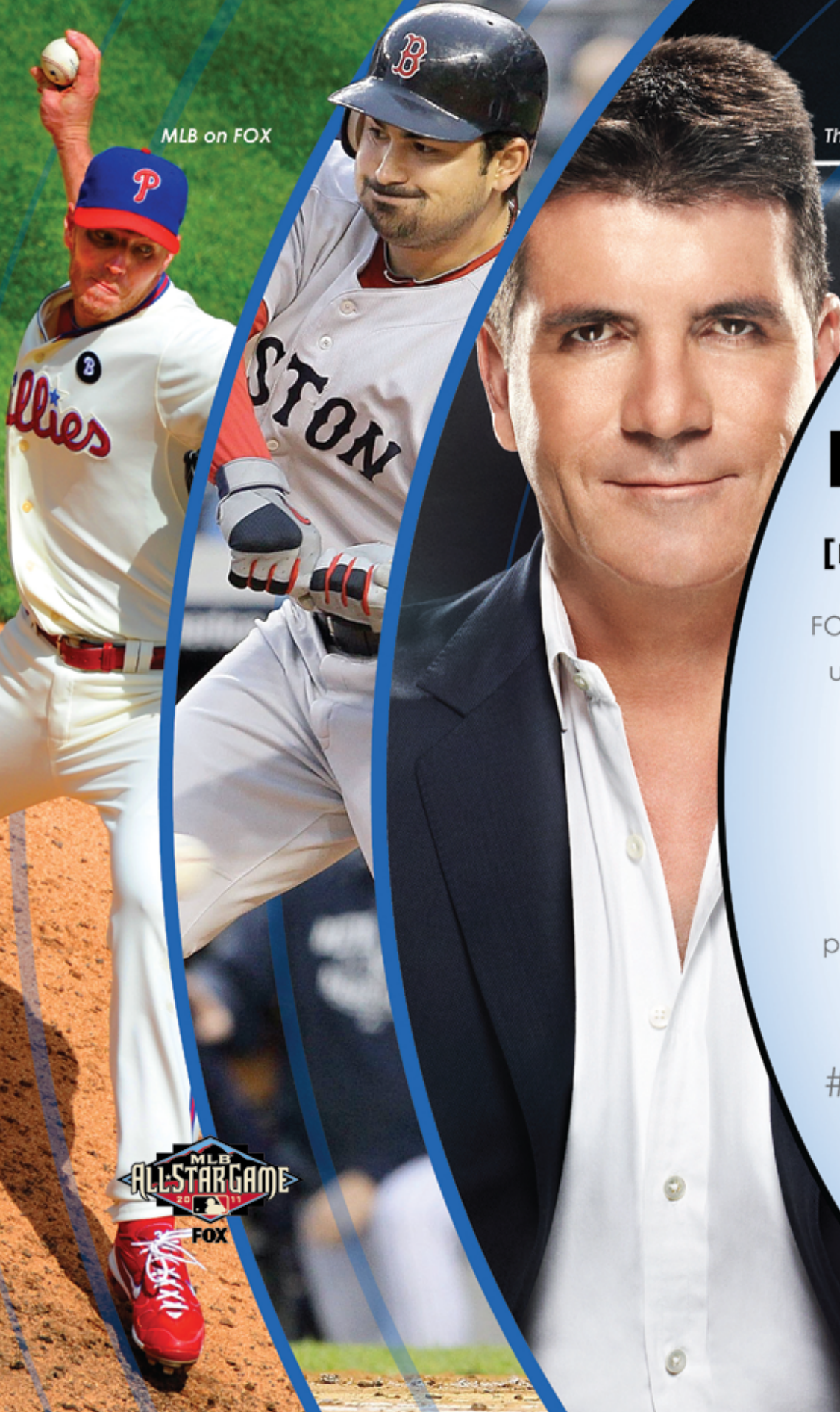
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League took aim at a proposal from the **Sports Fan Coalition** to waive the sports blackout rule when a retrans pact expires without a renewal or extension in place. The rule prevents cable and satellite providers from carrying a game locally when the over-the-air broadcast is blacked out because of lack of attendance at the game. The NFL said the SFC proposal is contrary to Congressional endorsement of the rule and would strengthen the hand of MVPDs. **Hallmark Channel** parent **Crown Media** also weighed in on retrans reform, with pres/CEO **Bill Abbott** endorsing **Cablevision's** recommendation to require broadcasters to charge non-discriminatory and transparent rates without tying deals to carriage of other networks (*Cfax*, 5/27). "Like other independents, our ability to fairly compete is virtually vanishing as the broadcasters unfairly steal a fair share of fees on the back of antiquated retransmission laws, once earned by worthy independents," Abbott wrote.

**Inside the Beltway:** NCTA spent \$4.57mln in 1Q on lobbying vs \$3.92mln in 1Q10 and \$5.86mln in 4Q, reports the AP. Cybersecurity, online taxation and Internet privacy proposals were among the issues NCTA lobbied on during the Q. -- Following inquiries from the **House Commerce** leadership, FCC chmn **Julius Genachowski** has said the agency will eliminate the Fairness Doctrine and other outdated regulations from the rulebooks by Aug. "The rules are outdated, unnecessary, and needlessly endanger our sacred freedoms of speech and the press," Reps **Fred Upton** (R-MI) and **Greg Walden** (R-OR) said. "The Commission says it plans to eliminate these obsolete rules through a streamlined, delegated-authority process, and we will continue to monitor the issue until they are fully repealed."

**Merger Mania:** Public interest and consumer groups are asking the **FCC** to hold public field hearings on **AT&T's** proposed **T-Mobile** takeover. The FCC held a public hearing in Chicago during its consideration of the **Comcast-NBCU** transaction. "Holding hearings would be consistent with the Commission's recent actions to increase public participation in its proceedings," said the letter, signed by **Public Knowledge, Consumers Union, Free Press, Future of Music Coalition, Media Access Project, National Hispanic Media Coalition** and the **Open Technology Initiative of the New America Foundation**.

**Carriage:** **Cablevision** boosted its intl package with the additions of Poland's **TVN24** and **TVN International**. -- **Sportsman Channel** moved to the digital preferred tier in **Comcast's** Orlando system. The system also launched Sportsman HD, as did Sarasota and Charleston, SC. -- **FiOS TV** has launched interactive music video net **SWRV** in all of its markets as part of the Extreme HD and Ultimate HD packages.

**Advertising/Marketing:** **ESPN** announced **Capital One** and **Castrol EDGE** as the returning presenting sponsors for "The 2011 ESPYs" (July 13), which counts assoc sponsors including **Gatorade, GMC** and **EA Sports**.

**More Ratings:** The accolades keep pouring in for **History**. In 2Q, the net became the 1st non-fiction net (excluding sports) to avg more than 1mln 25-54s for a quarter while airing the leading cable show in the demo on Mon ("Pawn Stars"), Thurs ("Swamp People") and Fri ("American Restoration"). -- The 4th season debut of **HBO's** "True Blood" delivered 5.4mln viewers to match the series high and improve 6% over last season's premiere. -- **TNT's** NASCAR '11 Sprint Cup Series coverage is averaging 5.1mln viewers through 3 weeks of racing, up 7% over the '10 season avg.

**Programming:** **BBC America** debuts comedy series "Friday Night Dinner" (brothers who return home for dinner each week with their quirky parents), July 30, 11:30pm. -- **CNN** tapped **Jessica Yellin** as chief White House corre-



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# BUSINESS & FINANCE

spondent. Yellin replaces *Ed Henry*, who left for **Fox News**. Separately, *Larry King* will interview several "Harry Potter" cast members including *Daniel Radcliffe* and *Emma Watson* for a special to air July 10 on the net in advance of the theatrical release of the franchise's final installment. -- In production at **Epix** is "A Liar's Autobiography," a film based on the memoir of late Monty Python member *Graham Chapman*. -- **Outdoor Channel** announced the 3Q premiere of 10 new shows, including "MidwayUSA's Gun Stories" (Wed), hosted by *Joe Mantegna*, and "Realtree's NASCAR Outdoors" (Thurs). -- **Sportsman Channel** debuts new series, "Wild Fish, Wild Places," Sat at 7:30pm ET.

**People:** BBC America's *John Taite* has a new job title: vp, branded ent and integrated ad sales solutions, BBC Worldwide America. -- **Oxygen Media** upped *Jennifer Kavanagh* to svp, digital. -- **SCTE** upped **Derek DiGiacomo**, *Steve Harris* and *Tom Russell* to sr directors and retained *Steve Hughey* and *George Wright* as consultants. -- **Crown Media** welcomed *Michael Pierce* as vp, financial planning and analysis.

**Business/Finance:** Previously on record with a \$48 price target for **AMC Networks** shares, **BTIG's** *Richard Greenfield* raised the number to \$50 due to a miscalculation of the company's avg cost of debt. AMC begins regular NASDAQ trading Fri.

## CableFAX Daily Stockwatch

Company	06/28 Close	1-Day Ch	Company	06/28 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
DIRECTV:	49.87	0.67	BROADCOM:	32.03	0.50
DISH:	29.39	0.65	CISCO:	15.13	0.08
DISNEY:	37.92	(0.15)	CLEARWIRE:	3.90	0.04
GE:	18.44	0.16	CONCURRENT:	5.89	0.05
NEWS CORP:	17.61	0.17	CONVERGYS:	13.53	0.23
<b>MSOS</b>					
CABLEVISION:	35.33	0.76	CSG SYSTEMS:	18.24	(0.03)
CHARTER:	54.57	0.48	ECHOSTAR:	35.92	0.47
COMCAST:	24.76	0.49	GOOGLE:	493.65	10.85
COMCAST SPCL:	23.55	0.53	HARMONIC:	7.15	0.09
GCI:	12.06	0.08	INTEL:	21.49	0.15
KNOLGY:	14.62	0.07	JDSU:	16.78	0.42
LIBERTY CAPITAL:	81.49	1.00	LEVEL 3:	2.37	0.09
LIBERTY GLOBAL:	43.97	1.32	MICROSOFT:	25.80	0.60
LIBERTY INT:	16.29	0.30	MOTOROLA MOBILITY:	22.04	(0.78)
SHAW COMM:	21.58	0.40	RENTRAK:	17.54	0.42
TIME WARNER CABLE:	77.66	1.35	SEACHANGE:	11.10	0.26
VIRGIN MEDIA:	31.42	(0.14)	SONY:	25.42	0.16
<b>PROGRAMMING</b>					
CBS:	28.10	0.75	SPRINT NEXTEL:	5.22	0.07
CROWN:	2.00	0.15	THOMAS & BETTS:	52.15	1.25
DISCOVERY:	40.87	0.51	TIVO:	9.91	0.05
GRUPO TELEVISA:	24.67	0.69	UNIVERSAL ELEC:	24.54	0.44
HSN:	31.26	0.64	VONAGE:	4.73	0.29
INTERACTIVE CORP:	37.00	0.45	YAHOO:	14.95	0.07
LIBERTY:	41.73	0.52	<b>MARKET INDICES</b>		
LIBERTY STARZ:	69.21	0.10	DOW:	12188.61	145.05
LIONSGATE:	6.52	0.05	NASDAQ:	2729.31	41.03
LODGENET:	3.13	(0.07)	S&P 500:	1296.67	16.57
NEW FRONTIER:	1.34	0.03			
OUTDOOR:	6.43	0.04			
SCRIPPS INT:	48.54	0.90			
TIME WARNER:	35.72	0.80			
VALUEVISION:	7.81	0.23			
VIACOM:	57.41	1.56			
WWE:	9.61	0.10			
<b>TECHNOLOGY</b>					
ADVANTAGE:	2.60	0.01			
ALCATEL LUCENT:	5.64	0.20			
AMDOCS:	29.97	0.17			
AMPHENOL:	51.68	0.72			
AOL:	19.91	0.30			
APPLE:	335.26	3.22			
ARRIS GROUP:	11.14	0.27			
AVID TECH:	18.10	(0.07)			
BIGBAND:	2.25	0.04			
BLNDER TONGUE:	1.63	(0.05)			

## CableFAX THE MAGAZINE Most Influential Minorities in Cable 2011

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Questions: Contact Mike Grebb at [mgrebb@accessintel.com](mailto:mgrebb@accessintel.com)

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