

CableFAX Daily™

Monday — July 7, 2008

What the Industry Reads First

Volume 19 / No. 129

TCA Countdown: Cable to Show its Wares While AFTRA Vote Lingers

Cable's portion of the **Television Critics Assoc** tour kicks off at an interesting time. Day 1 of the cable part of the tour comes Tues, the same day we learn the results of the **AFTRA** ratification vote. The **Screen Actors Guild** has decried the AFTRA contract as insufficient, so everyone's waiting to see what SAG will do once the vote is announced. It's noteworthy that former SAG pres *Ed Asner* is slated to appear on a **Hallmark Channel** panel Tues. Will TV critics and reporters pepper him with AFTRA questions or are they so tired of the contract uproar that they'll stick to the script of Hallmark's original movie "Generation Gap"? Regardless of the outcome, there doesn't appear to be much concern that actors won't turn out for the press tour, which runs July 8-22, with broadcasters following cable. The winter tour was canceled because of the writer's strike. The tour marks the first formal presentation from **Sundance Channel** since **Rainbow** acquired the net for \$496mln last month. Sundance's presentation will continue in the same vein as it would have pre-Rainbow, though we expect hacks will want to know more about the **Cablevision** subsidiary's plans for the channel. Then again, *Elvis Costello* is scheduled to be there for the net's new musical series hosted by the legendary singer/songwriter, so maybe "Who is Alison?" will be the question of the day. Here's some good news for those slaving away over the July 4th weekend to get ready for the tour. Based on RSVPs, organizers suspect that press attendance will be at or near record levels for the cable presentations. Pent up desire after the winter tour was canceled? Maybe. But more likely it's the growing number of Web-based outlets. "We're getting requests for credentials from outlets that probably didn't exist last year," an organizer said. Not every cable net that takes part in TCA will present during the 4 jam-packed cable days. **FX** and **NBCU** usually present during cable days, but have opted this year to exhibit with their broadcast siblings. **Showtime** and **Disney Cable Nets** will also present with their broadcast sisters. Among 1st-time TCA presenters is **Fox Reality**, which is showing off the star of its new series, *Ewan McGregor*. McGregor and *Charley Boorman* star in "Long Way Down" (Aug 2), which chronicles the 2 friends' motorcycle trip through distant lands to raise money for charity. **Cfax**, **Cable360.net** and the new **CableFAX Content Business** (www.cablefaxcontentbusiness.com) will keep you informed on all the TCA happenings.

Change of Plans: While the initial **Cable Connection Spring** schedule listed both **WICT's** annual Gala and Leadership Conference, the assoc tells us it won't hold the awards dinner next year (*Cfax*, 7/3). The April date is just too close to this year's Nov Gala in DC. Instead, WICT will host a 30th Anniversary Celebration during Cable Connection Spring (Apr 1-6) as well as its Leadership Conference. At this time, WICT expects to hold the Gala in the spring of 2010. No schedule has been released for the 1st Cable Connection week other than the dates for the **Cable Show** (Apr 1-3).

In The States: **RCN** has added 10 additional HD nets in NYC, including **NFL Net**, **Versus/Golf** and **Travel Channel**. -- **Versus** and **JetBlue** have partnered for a 5th consecutive year to offer air travelers access to the net's Tour de France coverage throughout July.



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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, 301/354-1681, 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

Online: TNA Wrestling has launched a video program at **IGN.com** featuring recaps of the league's action on **Spike**.

Ratings: USA (2.1/2.04mln) has padded its '08 prime cable lead with a 2Q victory marked by the net's most-watched 2Q ever and historical delivery bests among total viewers, HHs, 25-54s and 18-49s. Leading the net was the series premiere of original "In Plain Sight" (4.5/4.32mln), good for 12th on the telecast rankings. **NBA** playoff action—4 telecasts ranked in the top 10, including a Lakers/Spurs game on top—helped **TNT** (1.9/1.87mln) move to 2nd position, up 1 spot versus last Q. **Disney** (1.8/1.68mln) dropped to 3rd even as its original movie "Camp Rock" (5.6/5.35mln) tied for the top telecast notch. **ESPN** (1.4/1.35mln) and **Nick at Nite** (1.4/1.35mln) tied in 4th position, the former led by 5 NBA playoff tilts in the top 20. **Lifetime's** "The Memory Keeper's Daughter" (5.0/4.83mln) and TNT's **NASCAR** coverage (4.6/4.42mln) joined with Camp to prevent a complete domination of 2Q's top cable telecasts by the NBA. **Brag Book: Nickelodeon** (1.7/1.67mln) notched its 53rd consecutive quarterly win in total day. -- **WE** had its best quarter ever 2Q, with the net boasting that it's the fastest growing ad-supported cable net (excluding sports) among W18-49 (108K, +71%) and W25-54 (96K, +50%). -- **Oxygen** achieved its most successful Q ever in both prime and total day among 18-49s, total viewers, women 18-34 and women 18-49. -- **History** enjoyed its best 2Q ever, powered by increases in 18-49s (+23%) and 25-54s (+15%). -- **FSN FL's** Tues night Rays-Red Sox telecast earned a 9.1 local HH rating, more than doubling the net's previous Rays HH record of 4.5. Season-to-date, the team's ratings are up 36% (3.0 vs 2.3).

Programming: From the producers of **Discovery's** "Deadliest Catch" and **History's** "Ice Road Truckers," **Nat Geo's** "L.A. Hard Hats" (Aug 3) chronicles the construction of an eco-friendly high-rise. -- **TLC** bows new series "Must Love Kids," which follows 3 single moms trying to balance a relationship, career and kids, July 15, 9pm. -- **C-SPAN's** "The Communicators" this week features interviews from the recent Digital Media Conference in Tysons Corner, VA. **BitTorrent** pres *Ashwin Navin* is among those featured. It airs Sat at 6:30pm ET, and repeats on **C-SPAN 2** Mon at 8am and 8pm.

On the Circuit: Cable was well-represented during last week's **National Educational Computing Conference** in San Antonio, with **Cable in the Classroom**, **CTAM**, operators and programmers sharing their resources with more than 18K education leaders. A standing-room only crowd checked out a presentation of CIC's eLECTIONS broadband game. The week also included a summit hosted by **Time Warner Cable** San Antonio featuring more than 100 local teachers and a special visit from the **C-SPAN** Campaign 2008 bus. -- The 3rd annual **NATPE** Diversity Fellowship Program, presented with the **Walter Kaitz Foundation**, will run during the LATV Festival in LA, July 30-Aug 1. 24 emerging television and video creators of color will be the guests of NATPE.

People: **Cox** tapped **Channel Solutions** founder *Philip Meeks* as vp, **Cox Business**, and hired former **Arrow Electronics** exec *George Richter* as vp, supply chain mgmt. -- Former operations evp of **Time Warner Cable's** L.A. div *Roger Keating*, who left the MSO early last year, has joined **Hearst-Argyle TV** as svp, digital media.

Business/Finance: **Fitch** has revised its Ratings Outlook on **Cablevision** to "Stable" from "Negative," arguing that the MSO's *Newsday* acquisition will provide "opportunities to create revenue synergies by cross selling print, television, and online advertising to its local advertiser base." Plus, said Fitch, "integrating more local content... can further distinguish Cablevision's service offering from its competition." The firm did note concern, however, with **Verizon's** impending move into NYC and a likely decline in RGU growth rates.

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HISTORY

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CableFAX Week in Review

Company	Ticker	7/03 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
BRITISH SKY:	BSY	36.19	(3%)	(22.5%)
DIRECTV:	DTV	25.00	(3%)	8.10%
DISNEY:	DIS	30.90	(2%)	(4.3%)
ECHOSTAR:	DISH	26.84	(7.7%)	(21%)
GE:	GE	26.91	1.40%	(22.4%)
HEARST-ARGYLE:	HTV	18.89	(1.5%)	(13.3%)
ION MEDIA:	ION	1.45		12.40%
NEWS CORP:	NWS	14.76	(8.8%)	(29.7%)
MSOS				
CABLEVISION:	CVC	21.63	(5.3%)	(11.7%)
CHARTER:	CHTR	1.04	(2.8%)	(11.1%)
COMCAST:	CMCSA	18.33	(1.5%)	1.10%
COMCAST SPCL:	CMCSK	18.23	(0.9%)	1.30%
GCI:	GNCMA	6.91	(3.6%)	(21%)
KNOLOGY:	KNOL	10.69	(6.6%)	(16.4%)
LIBERTY CAPITAL:	LCAPA	14.35	(3.2%)	(38.4%)
LIBERTY ENT:	LMEDIA	23.39	(3.9%)	(3.3%)
LIBERTY GLOBAL:	LBTYA	31.01	(1.7%)	(20.9%)
LIBERTY INTERACTIVE:	LINTA	13.90	(9.4%)	(27.1%)
MEDIACOM:	MCCC	5.06	(7%)	10.20%
SHAW COMM:	SJR	20.72	9.10%	(8.4%)
TIME WARNER CABLE:	TWC	25.53	(3.1%)	(7.5%)
VIRGIN MEDIA:	VMED	12.73	(7.4%)	(22.2%)
WASH POST:	WPO	588.00	(1.1%)	(24.1%)

Company	Ticker	7/03 Close	1-Week % Chg	YTD %Chg
PROGRAMMING				
CBS:	CBS	18.60	(7%)	(27%)
CROWN:	CRWN	4.55	7.30%	(30%)
DISCOVERY:	DISCA	20.91	(7.9%)	(16.8%)
EW SCRIPPS:	SSP	2.93	(10.8%)	(13.7%)
GRUPO TELEVISA:	TV	22.36	(6%)	(2.9%)
INTERACTIVE CORP:	IACI	18.08	(7.6%)	(32.8%)
LIBERTY:	L	45.96	(3.2%)	(8.7%)
LODGENET:	LNET	4.24	(17.7%)	(75.7%)
NEW FRONTIER:	NOOF	3.69	(5.4%)	(18.7%)
OUTDOOR:	OUTD	6.56	(12.2%)	(4.9%)
PLAYBOY:	PLA	4.89	(4.5%)	(46.4%)
RHI:	RHIE	13.04	3.20%	3.20%
SCRIPPS INT:	SNI	41.34	1.40%	1.40%
TIME WARNER:	TWX	14.69	0.60%	(9.2%)
VALUEVISION:	VVTV	3.10	(24.4%)	(50.7%)
VIACOM:	VIA	29.70	(4.2%)	(32.5%)
WWE:	WWE	15.30	0.30%	11.80%

Company	Ticker	7/03 Close	1-Week % Chg	YTD %Chg
TECHNOLOGY				
3COM:	COMS	1.93	(10.6%)	(57.3%)
ADC:	ADCT	13.98	(8.7%)	(10.1%)
ADVANTAGE:	AEY	2.69	(12.1%)	(56.4%)
ALCATEL LUCENT:	ALU	5.78	(4.8%)	(21%)
AMDOCS:	DOX	28.13	(4.4%)	(18.4%)
AMPHENOL:	APH	44.96	(1.3%)	(2.8%)
APPLE:	AAPL	170.12	1.10%	(14.1%)
ARRIS GROUP:	ARRS	8.66	2.10%	(13.2%)
AVID TECH:	AVID	18.95	3.30%	(33.1%)
BIGBAND:	BBND	4.52	(9.8%)	(12.1%)
BLNDER TONGUE:	BDR	1.17	(6.4%)	(29.5%)

Company	Ticker	7/03 Close	1-Week % Chg	YTD %Chg
BROADCOM:	BRCM	26.22	(2.4%)	0.30%
C-COR:	CCBL	11.00		
CISCO:	CSCO	23.12	(2.9%)	(14.6%)
COMMSCOPE:	CTV	51.56	(1%)	4.80%
CONCURRENT:	CCUR	0.64	(5.9%)	(22.9%)
CONVERGYS:	CVG	14.58	(3%)	(11.4%)
CSG SYSTEMS:	CSGS	11.39	1.00%	(22.6%)
ECHOSTAR HOLDING:	SATS	30.27	(5.3%)	(8%)
GOOGLE:	GOOG	537.00	1.50%	(22.3%)
HARMONIC:	HLIT	9.20	(6.7%)	(12.2%)
JDSU:	JDSU	10.99	(4.2%)	(17.5%)
LEVEL 3:	LVL	2.63	(18.1%)	(13.5%)
MICROSOFT:	MSFT	25.98	(6.4%)	(25.5%)
MOTOROLA:	MOT	7.06	(3.3%)	(54.1%)
NDS:	NNDS	57.40	13.70%	(3.1%)
NORTEL:	NT	7.38	(15.4%)	(51%)
OPENTV:	OPTV	1.36		3.00%
PHILIPS:	PHG	32.45	(4.9%)	(16.9%)
RENTRAK:	RENT	13.98	(0.6%)	(3.1%)
SEACHANGE:	SEAC	6.75	(7.7%)	(6.6%)
SONY:	SNE	42.97	(5.7%)	(20.9%)
SPRINT NEXTEL:	S	8.51	(3.7%)	(35.2%)
THOMAS & BETTS:	TNB	35.29	(6.4%)	(28%)
TIVO:	TIVO	6.12	(3.5%)	(26.6%)
TOLLGRADE:	TLGD	4.71	(0.8%)	(41.3%)
UNIVERSAL ELEC:	UEIC	19.83	(10.9%)	(40.7%)
VONAGE:	VG	1.65	(9.3%)	(28.3%)
WORLDGATE:	WGAT	0.30		
YAHOO:	YHOO	21.35	(0.1%)	(8.2%)

Company	Ticker	7/03 Close	1-Week % Chg	YTD %Chg
TELCOS				
AT&T:	T	32.58	(2.6%)	(15.8%)
QWEST:	Q	3.76	(3.6%)	(40.7%)
VERIZON:	VZ	35.75	4.20%	(12.8%)

Index	7/03 Close	1-Week % Chg	YTD %Chg	
MARKET INDICES				
DOW:	INDU	11288.54	(1.4%)	(14.9%)
NASDAQ:	COMPX	2245.38	(3.3%)	(15.3%)

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. WEBB SYS:	0.05	66.70%
2. NDS:	57.40	13.70%
3. SHAW COMM:	20.72	9.10%
4. CROWN:	4.55	7.30%
5. VERIZON:	35.75	4.20%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. VALUEVISION:	3.10	(24.4%)
2. LEVEL 3:	2.63	(18.1%)
3. LODGENET:	4.24	(17.7%)
4. NORTEL:	7.38	(15.4%)
5. OUTDOOR:	6.56	(12.2%)

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MaxFAX...

Celebration!

Happy 4th of July! [Note: the vagaries of publishing required this to be written on the 2nd, published on the 3rd and dated the 7th. Just how it works].

Only 200 days (from the 4th) until change in Washington, DC. No matter who wins the presidency, there will be big changes in substance and tone. I've met Sen *John McCain* and really like him... very amusing, gracious and open man. I haven't yet met his opponent,

but I've read both candidates' books... both very impressive. While the resulting directions will be different, I don't think we can lose either way.

Since 2000, the Executive branch, with the roll-over-and-play-dead cooperation of the Congressional branch, executed (pun intended) an end-run around the Constitution in a grab for un-challengeable power. The Judicial branch, finally, is making the challenges... and since 2006, the Congress hasn't been quite as compliant.

But the erosion of bedrock American values has been breathtaking. As a soldier in basic training and in Officer Candidate School, the tenets of the Geneva Convention were drilled into my belief systems and behavior...



Paul S. Maxwell

this government decided those tenets were "quaint" and used—believe it or not—techniques used by Communist China in the Korean War to justify "enhanced interrogations." Those techniques didn't work in that war either. It would have been hard to imagine before 9/11, but fear—and the relentless packaging and repetition—drove America to abandon many principles that have made this nation great:

- A presumption of innocence (now anyone can be designated an "enemy combatant" and, until the recent Supreme Court decision, could not even challenge that guilt designation).
- Freedom of speech (instead, we have to watch what we say, write, print, blog, etc. or the FBI might be asking questions).
- Freedom of association (instead, we have guilt by association).
- Due process... somebody lost the 14th Amendment for awhile.
- A nation of laws that apply to every citizen and non-citizen as well... sure.
- Also, famously, one movement's philosopher said that he wanted "to strangle the government (by eliminating taxes) and drown it in the bathtub." That didn't happen... but the government did get swamped by a hurricane and a flood or two. Incompetence wasn't supposed to be in the plan; after all, the CEO has an MBA.
- One of the best examples of that is our very worst chairman of the

Federal Confusion Commission in history: Kevin Martian. Ideology and incompetence in one package!

• And the infrastructure crumbled; drove my Chevy to the levee, and it wasn't there.

The news, though, isn't all bad. We are a resilient and innovative people. And our institutions are as resilient as we. So join me and celebrate, pledge allegiance and don't forget when November comes... vote early and vote often... after all, we've been repeatedly told the ends justify the means.

Random Notes:

- **08/08/08: Coming soon...** can't wait for that, either. The contrast of our political system with the host country of this year's summer Olympics is just another reason for celebrating.
- **Good Political News:** The general election contest is going to be different from the last two. In 2000 and 2004 the mantra was "secure the base" (or, "divide and conquer"). This time, the political arms race will take a different shape as both candidates attempt to compete almost everywhere instead of in just a dozen or so battleground states. That means more ads on cable.

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THE MAGAZINE



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Honorees Celebrated in this Issue:

Independent System Exec of the Year: Amy Tykeson, BendBroadband

Independent Lifetime Achievement: Steve Weed, Wave Broadband

MSO Tech Innovation: Pragash Pillai, VP, Strategic Engineering, Bresnan Communications

MSO Lifetime Achievement: Ralph Roberts, Comcast

More category winners announced in the CableFAX: The Magazine Top Ops Issue

Publication Date: July 27

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We invite you to celebrate your most important partners' success and your achievements with a congratulatory or brand ad, in the July Issue of the Magazine.

Call us for a full list of all the honorees, as there may be additional clients that are important for you to consider in a congratulatory ad.

If you have any questions, please let us know. We look forward to working with you.

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