

CableFAX Daily™

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What the Industry Reads First

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Waiting Game: Comcast Scores Point as MASN Complaint Enters 9th Inning

Word is that the **FCC** Enforcement Bureau has recommended that **Comcast** not be required to carry **MASN** in some systems in VA and PA where it carries **Comcast Sports Net**, according to sources. The Bureau filed comments Fri on the merits of MASN's program access complaint against Comcast (**Cfax**, 7/31), but it will be awhile before redacted comments are available to the public. That's because MASN and Comcast have until Fri to request redactions, and the Bureau has until Aug 12 to file its public comments. While the Bureau's recommendation is good news for Comcast, the ball is still in play. FCC administrative law judge *Richard Sippel* still has to make his recommendation on the case (and is not obligated to follow the Bureau's recommendations), and then the FCC's 5 commissioners get to have the final say. Of course, none of that would be necessary if the 2 worked out a settlement on their own. MASN and Comcast are set to meet Tues to talk about a possible settlement (**Cfax**, 7/29). MASN tried unsuccessfully to delay the Bureau's comments until after the 2 met, but Sippel ruled last week that the net failed to show that a delay could help facilitate a deal or that the comments could jeopardize a settlement. MASN's dispute with Comcast stems from the lack of carriage in the MSO's Harrisburg, PA, and Roanoke/Lynchburg, VA, systems. The Bureau said last month that **Wealth TV** failed to prove its program access complaint against **Bright House**, Comcast, **Cox** and **Time Warner Cable**, but Sippel has not issued his decision yet. A 3rd program access complaint heard by Sippel, **NFL Net** vs Comcast, was settled in May when the MSO agreed to move the net to a more highly penetrated tier (see "Kick Off" below).

Kick Off: While millions of **Comcast** digital classic subs gained access to **NFL Net** over the weekend (as well as **ESPNU**, **NBA TV** and **NHL Net**), **Time Warner Cable**, **Cablevision** or **Charter** aren't necessarily close to adding the channel before preseason coverage begins Aug 14. **NFL** commish *Roger Goodell* promised to engage with those MSOs like he did with **Comcast** (**Cfax**, 5/20). A net rep told **Cfax** recently that "we're in the process of reaching out," while Time Warner and Charter confirmed both sides were "speaking" (Cablevision said it doesn't discuss negotiations with programmers). Still, it's been quiet, with it seemingly unlikely that any of the 3 cable holdouts will launch the net before the 1st-ever live triple-header (Aug 15) with Atlanta vs Detroit (4pm ET) followed by Chicago vs Buffalo and Seattle vs San Diego. NFL net will present 12 live preseason games, and coverage of every preseason game for the 1st-time (including every game in HD).

At the Portals: *Mignon Clyburn* was sworn in Mon in Columbia, SC, making her the 1st African American woman to serve as an **FCC** commissioner. "This is an exciting and challenging time in our nation's history," she said in a statement, noting that she favors "policies that protect consumers and encourage robust competition and innovation." -- Participants for the **FCC's** 1st National Broadband Plan workshop (Thurs, 9:30am ET) include US CIO *Vivek Kundra* and US Deputy CTO for Open Government *Beth Noveck*. The Chicago Committee for the '16 Games will provide a view on how that organization is using broadband to organize the city to support the effort to obtain the Olympics. There also will be a 25-min open mike for



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the public to weigh in. -- Late Fri, the **FCC** asked **Apple**, **AT&T** and **Google** for more info on Apple declining to approve the Google Voice app for the iPhone and removing related 3rd party apps from the iPhone store. The letters of inquiry from the Wireless Bureau come just weeks after the **DOJ** launched an unrelated inquiry into wireless handset exclusivity.

In the States: A clause in **Comcast's** contract to launch the **US Olympic Net** to about 10mln homes next year says the MSO won't launch the channel until it hits the 17-20mln distribution mark, *Sports Business Journal* reports. -- **Broadstripe** bowed a lifetime price guarantee program covering its footprint in MI, OH, MD and WA. Available for a limited time, "Broadstripe Forever" offers new and existing residential subs a triple-play package for approx \$130/month, including HSD speeds of up to 15Mbps. Info at **BroadstripeForever.com**.

Clear: The **Clearwire/Sprint/cable** jv followed '09 **Clear** launches in Portland, Atlanta and Las Vegas with rollouts in 10 markets. The 4G wireless broadband service is available in Boise, ID; Bellingham, WA; and 8 TX locales including Abilene, Corpus Christi and Waco. Still slated for expansion this year include Chicago, Charlotte, Philadelphia and Seattle.

Playing Nice, Crazy: **MSNBC** and **Fox News** have traded on-air barbs for years, but according to numerous weekend reports, a recent agreement between **GE** boss *Jeff Immelt* and **News Corp** honcho *Rupert Murdoch* has helped to ease the acrimony. The pair talked of a cease-fire of sorts in Jun, perhaps citing **NBCU/Fox** partnerships including **Hulu**. Still, it appears reasonable to expect occasional violations of the pact by outspoken anchors such as Fox News' *Bill O'Reilly* and MSNBC's *Keith Olbermann*. -- 21-yr-old *Karee Gibson* of Racine, WI, maintains that she isn't crazy or dangerous, even if her appearance on **WE tv's** "Bridezillas" has people wondering. According to local reports, Gibson acted like a frantic bride-to-be to gain feature on the show, only to be ordered to jail Mon morning after her parole officer claimed her on-show behavior violated her parole, which stems from a high school fight. In short, Gibson's disputing the reality of reality TV.

Technology: ExtendMedia bowed a software platform allowing cable and other video distributors to quickly build and deploy multi-screen content, a la cable's **TV Everywhere**. Features of the **OpenCase Publisher** include automation of content from myriad providers and integration with ad serving platforms and ad networks. -- **Intel** partnered with **Miniweb** and **Metrological** for a converged Web/TV platform that will be available in a range of devices such as cable and satellite set tops. -- **DirectTV**, **Broadcom** and **Cisco** formed the **RVU Alliance** to develop a spec for a full-featured "pixel accurate" Remote User Interface that will provide an identical user experience on all RVU-based thin client CE devices throughout the connected home, including set tops and digital TVs.

Marketing: MSG signed **Papa John's** to a year-long sponsorship for "Tonight's MSG Papa John's Lineup," which will run daily at 6:30pm (prime pizza-buying time). The onscreen graphic will include a rundown of MSG's top program-

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The Nielsen Company, Live, Cov AA%, P2+, Design Star 4 Premiere (7/19/09 10-11PM) vs all DS season premiere episodes (6/8/08 9-10PM), (7/22/07 9-10PM), (7/23/06 9-10PM). Up 20%+ Live, Reach(000), 6 minute qualifier, P2+, DS 4 Premiere vs DS 3 Premiere (6/8/08 9-10PM). Qualifications available on request.

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ming for the night, coupled with a 15-sec ad spot for Papa John's. The deal includes integration into the MSG TV schedule on MSG.com, and spots throughout the year on MSG and on Madison Square Garden's outdoor marquees.

Honors: Cable grabbed 7 of the 9 key **TCA Awards** on Sat, led by **HBO** (3) and **AMC** (2) and highlighted by the honoring of **Syfy's** "Battlestar Galactica" as Program of the Year. **Nickelodeon's** "Yo Gabba Gabba" earned the top prize in children's programming. **CBS** garnered the remaining 2 awards.

On the Circuit: Co-chaired by **AETN** pres/CEO *Abbe Raven* and **Cablevision** COO *Tom Rutledge*, the '09 **Kaitz Dinner** (Oct 28 in Denver) cmte includes **Disney Media Nets** co-chmn *George Bodenheimer*, **Mediacom** chmn/CEO *Rocco Commisso*, **Suddenlink** chmn/CEO *Jerald Kent*, **Scripps Nets** chmn/pres/CEO *Ken Lowe*, **MTVN** chmn/CEO *Judith McGrath* and **Gospel Music Channel** vice chmn *Brad Siegel*. Info at WalterKaitz.org/dinner2009. -- *Paul Lavoie*, chmn/co-founder of Canadian based intl ad and design network **TAXI**. will speak at **CTAM Summit**, Denver, Oct 25-27.

Tweeting Cable's Horn: Don't miss **CableFAX's** much anticipated Aug 13 Webinar (1:30-3pm ET) on how cable can leverage **Twitter**. For more info: http://www.cablefax.com/cfp/webinars/tweeting_cables_horn-2009.html.

CableFAX Daily Stockwatch

Company	08/03 Close	1-Day Ch	Company	08/03 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	36.04	(0.32)	APPLE:	166.43	3.04
DIRECTV:	26.28	0.38	ARRIS GROUP:	12.32	0.14
DISH:	17.45	0.50	AVID TECH:	12.68	0.43
DISNEY:	25.52	0.40	BIGBAND:	5.88	0.39
GE:	13.72	0.32	BLNDER TONGUE:	1.93	0.03
NEWS CORP:	12.38	0.36	BROADCOM:	28.42	0.19
MSOS					
CABLEVISION:	21.31	0.84	CISCO:	22.57	0.56
COMCAST:	15.13	0.27	CLEARWIRE:	8.74	0.64
COMCAST SPCL:	14.20	0.21	COMMSCOPE:	26.03	0.43
GCI:	7.08	0.23	CONCURRENT:	5.24	(0.18)
KNOLGY:	8.66	0.06	CONVERGYS:	10.39	(0.32)
LIBERTY CAPITAL:	15.51	0.93	CSG SYSTEMS:	16.50	(0.18)
LIBERTY ENT:	28.42	0.45	ECHOSTAR:	14.85	0.11
LIBERTY GLOBAL:	21.00	0.05	GOOGLE:	452.21	9.16
LIBERTY INT:	7.13	0.47	HARMONIC:	6.87	(0.06)
MEDIACOM:	5.08	0.29	INTEL:	19.37	0.12
SHAW COMM:	17.66	0.13	JDSU:	5.91	0.05
TIME WARNER CABLE:	34.24	1.18	LEVEL 3:	1.22	(0.01)
VIRGIN MEDIA:	11.22	0.77	MICROSOFT:	23.83	0.31
WASH POST:	476.19	24.69	MOTOROLA:	7.25	0.09
PROGRAMMING					
CBS:	8.91	0.72	OPENTV:	1.50	0.12
CROWN:	1.99	(0.04)	PHILIPS:	23.69	0.93
DISCOVERY:	25.39	0.89	RENTRAK:	18.20	(0.1)
EW SCRIPPS:	4.68	0.66	SEACHANGE:	9.37	0.22
GRUPO TELEVISIA:	18.30	0.21	SONY:	28.62	0.66
HSN:	10.48	0.35	SPRINT NEXTEL:	4.03	0.03
INTERACTIVE CORP:	18.52	0.11	THOMAS & BETTS:	27.09	0.45
LIBERTY:	32.08	2.06	TIVO:	10.62	0.37
LODGENET:	5.11	0.45	TOLLGRADE:	5.76	0.17
NEW FRONTIER:	2.06	(0.04)	UNIVERSAL ELEC:	21.84	0.73
OUTDOOR:	7.76	0.18	VONAGE:	0.44	0.02
PLAYBOY:	2.40	0.01	YAHOO:	14.34	0.02
RHI:	2.62	(0.11)	TELCOS		
SCRIPPS INT:	32.62	0.34	AT&T:	26.23	0.00
TIME WARNER:	27.26	0.60	QWEST:	3.99	0.13
VALUEVISION:	3.24	0.16	VERIZON:	32.03	(0.04)
VIACOM:	25.03	0.35	MARKET INDICES		
WWE:	13.72	0.59	DOW:	9286.56	114.95
TECHNOLOGY					
3COM:	3.84	0.07	NASDAQ:	2008.61	30.11
ADC:	7.21	(0.07)			
ADDVANTAGE:	1.95	0.02			
ALCATEL LUCENT:	2.97	0.21			
AMDOCS:	24.56	0.64			
AMPHENOL:	34.37	1.02			

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EYE ON DIGITAL

Digital Summer Lovin'

Many cable-related Web content providers no doubt joined a legion of American students in celebrating the school year's end. Once the final bell pealed in June, data from **comScore** show that students often chose digital entertainment to fill that month's void.

ABC Family's site, for example, saw its June uniques skyrocket 89% vs May to 1.68mln. **Nickelodeon Kids** also grew uniques, by 8% to 12.51mln, and **Comedy Central's** site got a 21% metric increase to 4.93mln. **MTVN** sites inched up 1% to 16.97mln.

But perhaps more telling of students' June Web migration is the jump in various properties' avg min/visitor. Comedy Central users stayed an avg of more than 10min (+101%), ABC Family's nearly 13min (+14.4%) and MTVN's 14min (+10.2%). Nick Kids' surfers lingered 69min, representing a deceptively solid 3% rise from a huge base (of the top 16 cable Web properties, only Fox News, at 80min, owns a larger avg min/user). Though not as kids-focused as other properties cited here, **USA** sites delivered 20% growth in avg stay to 10min, plus a 77% jump in uniques to 1.11mln.

Of course, there's a flip side to every coin, and it appears students' increased free time converted to less time for homeowners/parents to pursue their own digital desires at **HGTV.com** and **FoodNetwork.com**. The former experienced a 21% drop

in uniques to 3.4mln and a 22% decrease in avg min/user to 12min. Food Net eked out a 1% rise in uniques to 6.96mln, yet its avg min/user fell 2% to 16min. This effect may have also contributed to **Discovery** sites' month-to-month dip in uniques (-16%), although the Discovery and TLC sites set records in May.

Summer also places an enhanced premium on weather, helping **Weather Channel** garner 3% more uniques to 41.75mln while site users stayed for an avg of 12min (+4%). The property continues to hold a healthy lead in uniques over 2nd-place CNN and all others.

On the news front, both **CNN** and **Fox News** likely benefited from *Michael Jackson's* Jun 25 passing and the ensuing news frenzy. FoxNews.com achieved a 10% rise in uniques

to 9.52mln, and its avg user minutes inched up 1%. CNN.com, meanwhile, delivered 6% growth in uniques to 35.12mln and an impressive 16% jump in avg min/user to 43min. **C-SPAN.org**, however, suffered a 28% drop in uniques to 102K, and its users lingered for 5.6min on avg, a 27% fall off.

Other notables include **TNT.tv**, which saw uniques remain flat at 1.08mln although the site's avg user minutes jumped 28% to 6min. Sister site **TBS.com** delivered a 12% boost in uniques to 1.27mln and a 15% rise in avg user minutes to 6min. **Lifetime Digital's** uniques slipped to 3.67mln (-3%), but its avg min/user grew by 2% to just under 20min. **ESPN.com** achieved a 2% bump in uniques to 20.99mln but an 8% decrease in avg user min to 55min.

(Note: Some nets not included in chart)
- Chad Heiges



comScore Web Box Scores

	Total Unique Unique Vistors (000)	Total Unique Unique Vistors (000)	Total Unique Vistors (000)	Average Minutes Per User	Average Minutes Per User	Total Average Minutes
	May-2009	June-2009	% Change	May-2009	June-2009	% Change
Total Internet - Total Audience	193,825	193,896	0	1,848.6	1,807.5	-1.8
The Weather Channel	40,634	41,751	3	11.8	12.3	4.0
CNN	32,986	35,119	6	36.9	42.6	15.5
ESPN	20,513	20,984	2	59.5	54.6	-8.2
MTV Networks Music	16,875	16,971	1	12.5	13.8	10.2
Discovery Digital Media Sites	16,780	14,015	-16	9.0	9.1	0.5
Nickelodeon Kids	11,584	12,508	8	67.2	69.2	2.9
FoxNews.com	8,657	9,521	10	79.4	80.4	1.1
FoodNetwork.com	6,873	6,958	1	16.5	16.2	-1.7
Comedy Central	4,082	4,925	21	5.2	10.4	101.0
Lifetime Digital	3,786	3,665	-3	19.3	19.6	1.8

Data represents the top 10 most trafficked Web sites among the top 20 cable programmers based on the NCTA's rankings

Source: ComScore (www.comscore.com)

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