

CableFAX Daily™

Wednesday — August 25, 2010

What the Industry Reads First

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Zoning In: Cox Reups with NFL Net, Launches RedZone

Football is definitely in the air... Days after striking its 1st deal with NCTC, NFL Net signed a separate renewal agreement with Cox that will have the 3rd largest MSO launching its RedZone for the 1st time this season. That puts NFL RedZone in Comcast, DISH, U-Verse, FiOS, RCN and Suddenlink homes, with likely more carriers to come on board before the channel's Sept 12 debut—especially since RedZone is part of the deal NFL announced Fri with NCTC. As was the case last season, it will vary how distributors carry the channel. Cox will make it available for \$39.99/mo, while RCN and FiOS charge \$49.99 (it's free for FiOS Ultimate subs). Comcast offers it as part of its Sports Tier (an extra \$5-7/mo, varying by market) and DISH puts it on its multi-sports package for \$7/month. And the words "sports tier" brings us to that important clarifier... Cox carries NFL Net on its broadly distributed "Sports & Information Pak;" NFL Net doesn't allow the channel to be carried on a sports-only tier. Cox Preferred subs can choose either the Sports & Info Pak, Movie Pak, Variety Pak or Latino Pak, while Cox Premiere subs can choose 3 of the entertainment paks. It's important to mention that because it sounds like the NCTC deal may feature some distributors carrying NFL Net in a similar fashion as Cox. Our own call to Suddenlink customer service and that of a poster's on Suddenlink's forum at DSL reports indicates NFL Net will likely be on a Sports & Info tier, which is a widely distributed digital service. Of course, RedZone can be placed on a sports tier. A demo of the service is available at: <http://redzonetv.nfl.com/>.

Techie TWC: It sounds like Time Warner Cable's much whispered about IPTV test is already underway, based on a note from Miller Tabak's David Joyce after he met with COO Landel Hobbs this week. "The company is currently testing an IP (internet protocol) delivery infrastructure in at least one market, both as a means for bandwidth reclamation (that will allow much more interactivity and HD channel capacity), and for an open architecture that could allow more applications to be rolled out efficiently," Joyce wrote in a note reiterating a "Buy" on TWC. MSO execs have previously said an IPTV trial would be in place before year-end, with some press reports speculating on L.A. Joyce's firm believes TWC is re-focusing on forward-thinking tech developments. "We believe its legacy has been that of an innovator in the industry, and the time is ripe for TWC to lead on developing multiple-platform applications and content and communications delivery," he wrote. The MSO's techie YouTube videos starring CEO Glenn Britt, CTO Mike LaJoie and an iPad certainly got a lot of buzz.

Comcast-NBCU: Comcast doesn't force tied networks. That was the word from Comcast Programming pres Jeff Shell during a meeting with FCC staffers last week, according to an FCC filing. During the meeting, Shell explained that while Comcast may offer a discounted price on 1 net to secure expanded distribution for another net, it does not require carriage of any network as a condition of access to another. Similarly, Comcast Spotlight svp, gm Hank Oster was on hand to explain that neither Comcast's networks nor its local ad sales arm requires any advertiser to

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buy time on any particular network in order to purchase time on another desired network.

Competition: DISHOnline.com officially launched Tues offering access to more than 150K movies, TV shows, clips and trailers. All of the content is available to DISH subs, who can watch both live and recorded content through the service and rent movies for DVR download. Some content is also available for free to anyone, with Hulu providing most if not all of the free features, which include ads. 24 cable nets require a DISH sub to view site content, including Epix, Discovery Channel, E!, Food and Nickelodeon. A slew of cable nets, the big 4 broadcasters and several film studios offer free content.

In the States: Comcast bowed new DVR services in MA and Southern NH, including AnyRoom DVR, which allows subs to watch recorded content on any household TV, and On Demand Skip Ahead and Skip Back.

Carriage: MASN inked a carriage agreement with Fibrant, a FTTH service in Salisbury, NC, that will serve 30K residents when it launches next month.

Online: Apple and News Corp are in advanced talks to offer Fox TV shows via iTunes for 99 cents/ep, according to Bloomberg, which added that CBS and Disney are also considering the arrangement. The Fox deal would allow users to rent shows for 48 hours. -- Virgin Mobile USA intro'd a new \$40/month unlimited plan for its Broadband-2Go mobile broadband play, which operates on Sprint's network, allows for in-home use and offers access through either a computer-connected USB device or a prepaid mobile WiFi hotspot. -- Sprint launched Sprint.com/smallbiz to allow SMBs to research, compare and buy the comm services/products they need.

In the Courts: A man arrested for securities and wire fraud and accused of leaking confidential Disney documents pleaded guilty to the charges Tues in a Manhattan federal court. With his girlfriend, a former assistant to a Disney corp comm exec, Yonni Sebbag pitched sales of the info to several hedge funds and eventually sold it to an undercover FBI agent for \$15K. No sentencing date has been set. Criminal charges are pending against the girlfriend, Bonnie Jean Hoxie.

Research: The US multichannel market has some company in its decline. '10 is on pace to become the 1st year that global demand for cable set-tops exhibits negative growth since '02, according to In-Stat, which projects growth for Europe and Latin America. Overall, worldwide digital cable set-top unit shipments are forecasted to decrease to 44.1mln in '10, down 8% from '09. Greatly affecting the US market are low-cost DTA devices, 7mln of which the firm said will ship this year.

Marketing/Advertising: Approx two-thirds of the 137 brand marketers and ad agency pros surveyed by The Pivot Conference have already implemented social media marketing programs, and 87% plan to increase that investment in the next 12 months. Of the 37% of marketers who aren't currently using social media, 62% plan to invest in the space within 1 year.

Ratings: History's "Swamp People" emerged Sun to garner 4.2mln total viewers, 2.5mln 25-54s and 2.3mln 18-49s and become the net's best-ever original series launch. -- Paced by the return of "Keeping Up with the Kardashians," E! posted Sun its highest-rated and most-watched day ever across all key demos, including total viewers (980K), 18-34s (420K), 18-49s (631K), women 18-34 (316K) and women 18-49 (476K). -- Nearly indomi-

100

CableFAX

It's that time again!

Nominate your colleagues, your boss or even yourself for the CableFAX100—our annual cable industry power list—which will appear in the December edition of *CableFAX: The Magazine* and whose members will be celebrated during luncheon on **December 9 in New York**.

Nominate those who might not be headline makers but who are influential behind the scenes within their company and the industry. We also seek nominees who are influential at the regional/local/state level for our Regional list.

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Nominate at: www.cablefax.com/cablefax100

BUSINESS & FINANCE

table since launching as a back-to-back pairing last month, TNT's "The Closer" and "Rizzoli & Isles" again led cable, delivering a respective 5.1/5.08mIn and 4.9/4.86mIn. Based on Live+7 data, Closer is averaging 8.4mIn viewers/ep this season, R&I 8.7mIn. -- **ESPN's** 1st Mon night **NFL** preseason game notched a 4.3/4.24mIn to rank 5th among cable telecasts last week, again proving the overwhelming allure of pro football. The net's Aug 12 (Thurs) game scored a 2.9/2.87mIn. The franchise's regular season coverage kicks off Sept 13 with a double header (Ravens-Jets, Chargers-Chiefs). -- **Disney Channel** ranked as TV's top network in Total Day for the 10th consecutive week among tweens 9-14 and for the 3rd straight week among Kids 6-11.

Programming: New **G4** series "Bomb Control: Afghanistan" (spring) will feature the home and overseas lives of NAVY members who specialize in diffusing and dismantling explosions. -- As **AMC's** 1st wholly-owned original, "The Walking Dead" will premiere Halloween night to tell the story of life following a zombie apocalypse. -- The "Tr3s Latino Artist of the Year" category was added to this year's **MTV VMAs**, with the winner to be chosen by **Tr3s** viewers through votes at **Tr3s.com**. -- **Comedy Central's** "Futurama" marks its 100th ep and Season 6 finale, Sept 2, 10pm.

CableFAX Daily Stockwatch

Company	08/24 Close	1-Day Ch	Company	08/24 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
DIRECTV:	37.42	(0.39)	ARRIS GROUP:	8.45	(0.15)
DISH:	17.44	(0.52)	AVID TECH:	11.22	(0.39)
DISNEY:	32.14	(0.79)	BIGBAND:	2.75	(0.09)
GE:	14.57	(0.32)	BLNDER TONGUE:	1.91	0.01
NEWS CORP:	13.74	(0.27)	BROADCOM:	31.81	(0.73)
MSOS					
CABLEVISION:	24.32	(0.64)	CISCO:	21.13	(0.55)
COMCAST:	17.01	(0.44)	CLEARWIRE:	6.26	(0.31)
COMCAST SPCL:	15.98	(0.42)	COMMSCOPE:	18.83	(0.37)
GCI:	8.15	0.05	CONCURRENT:	5.09	(0.03)
KNOLOGY:	12.20	(0.35)	CONVERGYS:	10.07	(0.12)
LIBERTY CAPITAL:	44.17	(0.34)	CSG SYSTEMS:	17.54	0.01
LIBERTY GLOBAL:	27.64	(0.2)	ECHOSTAR:	18.96	(0.12)
LIBERTY INT:	10.25	(0.21)	GOOGLE:	451.39	(12.68)
MEDIACOM:	6.75	(0.05)	HARMONIC:	5.84	0.01
RCN:	14.91	0.02	INTEL:	18.41	(0.29)
SHAW COMM:	20.37	0.05	JDSU:	10.07	(0.17)
TIME WARNER CABLE:	51.48	(1.45)	LEVEL 3:	1.05	(0.02)
VIRGIN MEDIA:	20.00	(0.07)	MICROSOFT:	24.04	(0.24)
WASH POST:	369.60	0.82	MOTOROLA:	7.46	0.02
PROGRAMMING					
CBS:	13.25	(0.17)	RENTRAK:	21.81	(0.09)
CROWN:	1.77	(0.21)	SEACHANGE:	8.04	(0.27)
DISCOVERY:	36.81	(0.98)	SONY:	28.07	(0.87)
GRUPO TELEVISIA:	18.57	(0.52)	SPRINT NEXTEL:	3.95	(0.14)
HSN:	26.58	(1.49)	THOMAS & BETTS:	36.16	(0.98)
INTERACTIVE CORP:	23.96	0.24	TIVO:	8.34	(0.08)
LIBERTY:	35.35	(0.51)	TOLLGRADE:	6.58	(0.12)
LIBERTY STARZ:	58.99	(0.71)	UNIVERSAL ELEC:	17.44	(0.11)
LIONSGATE:	6.56	0.04	VONAGE:	2.06	0.02
LODGENET:	2.41	(0.05)	YAHOO:	13.40	(0.25)
NEW FRONTIER:	1.49	0.00	TELCOS		
OUTDOOR:	5.06	0.05	AT&T:	26.72	0.23
PLAYBOY:	4.99	0.04	QWEST:	5.66	0.02
SCRIPPS INT:	40.07	(0.67)	VERIZON:	29.47	0.06
TIME WARNER:	29.81	(0.3)	MARKET INDICES		
VALUEVISION:	1.95	(0.01)	DOW:	10040.45	(133.96)
VIACOM:	35.26	(0.35)	NASDAQ:	2123.76	(35.87)
WWE:	13.59	(0.26)	TECHNOLOGY		
TECHNOLOGY					
ADC:	12.65	0.04			
ADVANTAGE:	2.80	(0.11)			
ALCATEL LUCENT:	2.56	(0.03)			
AMDOS:	25.94	(0.23)			
AMPHENOL:	40.37	(0.39)			
AOL:	21.78	(0.65)			
APPLE:	239.93	(5.87)			

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