

CableFAX Daily™

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What the Industry Reads First

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Summer Time: Cable Continues to Chip Away at Broadcast

Cable's usually sizzles in the summer, and with only a few days remaining, it looks like this year was no exception. Household share for ad-supported cable was up more than 5 points from a year ago and more than 3x the combined 4 broadcast nets' share, which was down 5 points from '12, according to a **Turner** analysis of summer-to-date data from **Nielsen**. Turner projects cable's share at 76%. Ad-supported cable's share among 18-49s is projected to hit a record high of 78%, up 6 percentage points from a year ago. Online video doesn't seem to be having much of an impact at this point, with viewing of ad-supported cable at an all-time high and average hours of viewing per person per week at 17.4, up from 17 last year, Turner said. The broadcast nets' average viewing per person slipped to 6.2 hours from 6.8 last year. **USA** continues its reign, with the net easily expected to nab its 8th consecutive summer win among total viewers (2.91mln) 18-49s (1.07mln) and 25-54s (1.13mln) in prime. There's a new champ in the 18-34 category, with **Adult Swim** celebrating its first #1 summer finish among the demo in prime. Compared to the same period last year, the net's average primetime delivery for 18-34s swelled 19% to 555K. Other accolades: **A&E's** "Duck Dynasty" trumped all other summer primetime series, netting 11.8mln total viewers. **TNT's** "Rizzoli & Isles" was a distant 2nd with 7.6mln. On the other hand, **TNT's** "King & Maxwell" performed the best among new cable series this summer (4.4mln), according to Turner's analysis. Other new shows pulling in solid numbers: **USA's** "Graceland" (3.7mln), **Lifetime's** "Devious Maids" (3.4mln), **FX's** "The Bridge" (3.3mln) and **Discovery's** "Naked and Afraid" (3.2mln).

TLC Changes: Big changes at the programmer, with the net confirming a *Deadline* report that *Amy Winter* has stepped down as gm but will remain as evp, brand marketing. Winter became gm in Feb '11, and counts "Honey Boo Boo" and "Secret Princes" among her accomplishments. She had been commuting off and on from Atlanta to Silver Spring, MD, for 2 years, and plans to relocate just didn't work out. Winter has 3 children under 7 and a husband with a production business in Atlanta. **Discovery** and **TLC Nets** group pres *Eileen O'Neill* will assume Winter's responsibilities for now.

Day 21: "I hope for Verizon's sake that they didn't sign that, but if they did, I'm glad for us because we'll compete that

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Register at www.CableFAXTVSummit.com

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much better against them when we finish our deal,” said *Melinda Witmer*, Time Warner Cable evp, chief video and content officer, in a video appearing on **Time Warner Cable’s** blog **TWCableUntangled.com**. She was, of course, referring to the CBS deal **Verizon** struck this week while TWC and **Bright House** customers remain without **CBS** in O&O markets. They’re also missing out on **Showtime** and **Smithsonian Channel**. Witmer thanked customers for their business and patience. “If I said yes to every first proposal that a programmer like CBS asked me for, your cable bill would be more than \$200/month. You’re fighting for something real,” she said. Emails went out Fri to TWC subs affected by the CBS drops and the **Journal Broadcast** blackouts, offering movie-on-demand coupons for digital customers (**Amazon.com** gift cards for those without digital boxes) and indoor antennas.

Customer Service: **DISH** and **DirecTV**, placing 207th and 212th, topped most of their cable competitors in terms of customer service, according to Temkin Ratings by customer experience research firm **Temkin Group**. There’s an exception: **Bright House**, which topped all pay-TV providers and placed 166th, among the 235 companies ranked. Other major cable ops were at the bottom of the list, with **Charter** placing last. **Cablevision** tied with **Cox** for 231st place while **Comcast** tied with **Verizon** for 229th place. **AT&T U-Verse** was #222 on the list.

TVE: **Synacor** is collaborating with **Tennis Channel** and **Verizon** to live stream US Open exclusive to Verizon FiOS’s TV subs. The service is available 24/7 via embedded video player on the Verizon startpage.

Programming: **ABC Family** will produce 3 comedy pilots, “Mystery Girls,” starring *Tori Spelling*, “Work Mom,” written by “Bunheads” writers, and “Young & Hungry” (*Ashley Tisdale* is among exec producers). -- **The Mid-American Conference** signed a 3-year deal with **Time Warner Cable SportsChannel**, making it the exclusive home of MAC sports in OH and western and central NY. -- **RFD-TV** announced “The American Rodeo” to be held in Arlington, TX, on Mar 2, with a \$2mln payout, making it the single largest 1-day cash prize in rodeo. RFD will televise the event live. -- **HGTV** is counting on fantasy series featuring dream locations. It booked 3 travelogue-style series for next year: “Beachfront Bargain Hunt,” “Living Alaska,” and “Caribbean Life.” The net also booked additional eps of “Island Hunters” and renewed “Hawaii Life” for a 2nd season.

Marketing: Under a multi-year agreement with the **US Tennis Association**, **Time Warner Cable** will be the official sponsor of the US Open Tennis Championships in NYC across digital cable, HSD, home phone and Intelligent Home services. The partnership includes promotional efforts such as advertising across some US Open properties as well as the “Time Warner Cable Experience,” an on-site activation space at the **USTA Billie Jean King National Tennis Center** during the tournament. The TWC space features a 6-court **FanVision** video wall, appearances from former tennis stars, an umpire chair photo booth, charging stations and more. Based in NYC, FanVision provides in-venue content through UHF broadcast systems. The first 500 TWC subs who visit the TWC Experience space each day will get free access to a FanVision device, which they can use around the courts for the day. It shows action from the 6 different courts at the same time and has other features like social media and player profiles. The cable op will also have the “STEM in Tennis” station, as part of its Connect a Million Minds’ “STEM in Sports” campaign, during *Arthur Ashe Kids’ Day*. Participants can explore the math and science behind a winning tennis shot.

International: **Discovery Comm** is looking to develop “the next generation of groundbreaking epic series and landmark events” with the launch of \$500K Global Landmark Development Fund. A partnership between **Discovery Channel** and **Discovery Networks International**, the fund will be used to invest in “the most impressive and daring ideas from the production community around the world,” the company said in a release. “Discovery Channel is as committed as ever to pushing the boundaries of traditional genres and breaking new grounds in the non-fiction space,” said group pres *Eileen O’Neill*, of Discovery Channel and **TLC**.

Rumor Mill: Apparently everyone wants their own wireless network. **Amazon** reportedly conducted tests of a wireless network using satellite company **Globalstar’s** spectrum for a potential new broadband service, which would allow it to connect its Kindle and other devices. The rumor came as the satellite company is seeking **FCC** approval to convert its spectrum for terrestrial use.

Midnight Run: The early bird discount for the **CableFAX’s** Sept 24 TV Innovation Summit in NYC ends Fri, Aug 23, at midnight. Don’t miss out! More info at www.cablefaxtvsummit.com

CableFAX Week in Review

Company	Ticker	8/23 Close	1-Week % Chg	YTD %Chg
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BROADCASTERS/DBS/MMDS

21ST CENTURY FOX:	FOXA	32.19	0.69%	0.00%
DIRECTV:	DTV	57.88	(2.84%)	15.39%
DISH:	DISH	44.91	0.92%	23.38%
DISNEY:	DIS	61.73	(0.71%)	23.98%
GE:	GE	23.78	(0.71%)	13.29%

MSOS

CABLEVISION:	CVC	17.78	(3.53%)	19.01%
CHARTER:	CHTR	122.70	0.08%	60.94%
COMCAST:	CMCSA	41.86	(6.19%)	12.04%
COMCAST SPCL:	CMCSK	40.43	(0.91%)	12.56%
GCI:	GNCMA	9.01	(5.85%)	(6.05%)
LIBERTY GLOBAL:	LBTYA	76.23	(3.69%)	21.08%
LIBERTY INT:	LINTA	22.69	2.72%	15.29%
SHAW COMM:	SJR	24.23	(1.54%)	5.44%
TIME WARNER CABLE:	TWC	108.73	(1.1%)	11.87%
WASH POST:	WPO	579.31	1.67%	58.62%

PROGRAMMING

AMC NETWORKS:	AMCX	64.70	(1.46%)	30.71%
CBS:	CBS	53.20	2.94%	39.82%
CROWN:	CRWN	2.88	(2.04%)	55.68%
DISCOVERY:	DISCA	80.56	0.27%	26.91%
GRUPO TELEVISIA:	TV	26.86	(2.29%)	1.05%
HSN:	HSNI	56.56	(1.19%)	2.69%
INTERACTIVE CORP:	IACI	50.60	1.22%	7.11%
LIONSGATE:	LGF	35.51	5.43%	116.52%
SCRIPPS INT:	SNI	74.60	(0.23%)	28.80%
STARZ:	STRZA	24.75	0.73%	0.00%
TIME WARNER:	TWX	62.36	2.46%	30.38%
VALUEVISION:	VVTV	4.87	(10.97%)	170.56%
VIACOM:	VIA	79.73	1.15%	46.91%
WWE:	WWE	10.08	(1.18%)	27.76%

TECHNOLOGY

ADDVANTAGE:	AEY	2.45	(3.92%)	23.12%
ALCATEL LUCENT:	ALU	2.76	2.22%	98.56%
AMDOCS:	DOX	37.98	(1.35%)	11.74%
AMPHENOL:	APH	77.80	4.02%	20.25%
AOL:	AOL	34.94	(0.77%)	18.00%
APPLE:	AAPL	501.02	(0.26%)	(5.85%)
ARRIS GROUP:	ARRS	16.25	(2.58%)	8.77%
AVID TECH:	AVID	5.54	(0.89%)	(26.91%)
BLNDER TONGUE:	BDR	0.87	(1.14%)	(24.35%)
BROADCOM:	BRCM	25.24	(2.59%)	(24%)
CISCO:	CSCO	23.86	(1.69%)	21.42%
CONCURRENT:	CCUR	8.67	8.51%	51.05%
CONVERGYS:	CVG	18.71	(0.53%)	14.02%
CSG SYSTEMS:	CSGS	24.78	(0.48%)	36.30%
EHOSTAR:	SATS	41.39	(1.83%)	20.95%
GOOGLE:	GOOG	870.21	1.55%	23.02%
HARMONIC:	HLIT	7.46	(2.86%)	47.14%
INTEL:	INTC	22.44	(0.31%)	8.83%
JDSU:	JDSU	13.55	(0.81%)	0.37%
LEVEL 3:	LVT	22.85	1.42%	(1.13%)
MICROSOFT:	MSFT	34.75	9.28%	30.10%
RENTRAK:	RENT	23.71	0.59%	21.65%

Company	Ticker	8/23 Close	1-Week % Chg	YTD %Chg
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SEACHANGE:	SEAC	10.88	(0.46%)	12.51%
SONY:	SNE	20.21	1.15%	80.45%
SPRINT NEXTEL:	S	6.96	0.58%	22.75%
TIVO:	TIVO	11.33	3.75%	(7.96%)
UNIVERSAL ELEC:	UEIC	31.78	(0.56%)	64.24%
VONAGE:	VG	3.15	(3.67%)	32.91%
YAHOO:	YHOO	27.99	2.45%	40.65%

TELCOS

AT&T:	T	34.29	0.32%	1.72%
VERIZON:	VZ	47.61	(0.21%)	10.03%

MARKET INDICES

DOW:	DJI	15010.51	(0.47%)	14.55%
NASDAQ:	IXIC	3657.79	1.53%	21.14%
S&P 500:	GSPC	1663.50	0.46%	16.64%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. MICROSOFT:	34.75	9.28%
2. CONCURRENT:	8.67	8.51%
3. LIONSGATE:	35.51	5.43%
4. AMPHENOL:	77.80	4.02%
5. TIVO:	11.33	3.75%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. VALUEVISION:	4.87	(10.97%)
2. COMCAST:	41.86	(6.19%)
3. GCI:	9.01	(5.85%)
4. ADDVANTAGE:	2.45	(3.92%)
5. LIBERTY GLOBAL:	76.23	(3.69%)

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