

# CableFAX Daily™

Tuesday — September 8, 2009

What the Industry Reads First

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## Move Over Boys: Cable's Female Audience Increasing

Originals, sports, greater brand recognition, defections from broadcast—the catalysts to cable's rising summer (and year-round) viewership in recent years are many. And, there's no denying the enduring strength of that industry uptrend, what with **USA** establishing cable delivery records in summer prime this year among myriad metrics, including total viewers (3.6mln) and HHs (2.67mln). But what demos are driving the growth? The answer—at least for the top 5 prime nets in July and Aug—appears to be women, according to **Nielsen** data, with a slight skew toward older females. Take USA, for example. Following a typically weak July, the net enjoyed viewership surges in Aug across virtually every demo, including an impressive 22% month-to-month jump among women 25-54. Comparatively, 18-49s grew 11% for the net and men 18-49 rose 7%. Add to USA's data that from the 4 other top nets in July and Aug—**Disney Channel**, **TNT**, **Fox News** and **Nick at Nite**—and the women 25-54 demo collectively rose 16% month-to-month while women 18-49 (+14%) and women 18-34 (+14%) also outpaced 18-49s (+8%) and men 18-49 (flat). Moreover, each of the 5 nets achieved YOY increases in Aug among the 3 aforementioned female demos. Girl power was exceedingly evident at Nick at Nite, which delivered from July-Aug high bounces among women 18-34 (+29%), 18-49 (+23%) and 25-54 (+27%). Other nets are seeing smaller, yet notable, female gains. During the summer, **Syfy** caught fire with the help of freshman original "Warehouse 13," now the net's biggest hit series in its 17-yr history. "It's bringing in more viewers, more female viewers than we've ever done," said Syfy pres *Dave Howe*. In Jul, the net grew female 18-49 viewership by 2% and women 25-54 by 5%. Somewhat staggering are the hale YOY increases among older women that Disney achieved in July and Aug ("Hannah Montana" family nights?). Net viewership among women 18-34 jumped 30% in July and 35% in Aug, women 18-49 rose by a respective 20% and 36%, and women 25-54 expanded by 16% and 33%. Plus, the Aug advancements alone easily outpaced the respective monthly growth among the net's target demos, kids 6-11 (+13%) and tweens 9-14 (+12%).

**Patent Spat:** **DISH** shares climbed nearly 6% Fri after a district court ordered the DBS player to pay **TiVo** \$200mln as part of ongoing patent infringement litigation. TiVo, whose shares rose 6% Fri, was seeking \$1bln in additional sanctions. Both sides found things to like about the decision. "We are pleased that the district court rejected Tivo's request to award a billion dollars in sanctions and that it found that any violation of the injunction was not willful,"

**SONS OF ANARCHY**

TONIGHT 10PM **FX** THERE IS NO BOX

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DISH and EchoStar said. "While we disagree that any amount of sanctions was warranted, the decision confirms our belief that we designed around TiVo's patent in good faith. We believe that we ultimately will prevail on appeal." TiVo said it was pleased by the fine and "that the Court 'will seriously entertain the award of enhanced sanctions' if EchoStar is unsuccessful on appeal and nevertheless continues to disregard this Court's orders." The ruling isn't the end of the two's feud. A final decision still hasn't come down on the meat of the dispute—whether DISH's work-around DVR infringes on TiVo's Time Warp patent.

**In the States:** DirecTV filed suit against *John Metzler*, owner and operator of **Phoenix Comm** and **Pine River Cable**, claiming he fraudulently redistributed DirecTV programming to hundreds of customers over a cable system in several MI communities. Affected subs have been provided with on-screen info on how to obtain legitimate programming services, DirecTV said. -- **Cox** launched its **MyPrimetime On Demand** service in Las Vegas and San Diego.

**5Qs with ACC's new pres/Cablevision media relations vp Jim Maiella: Over the years, Cablevision hasn't had a reputation for being particularly talkative when it comes to the press. Is there some irony there in you heading up cable's association for communicators?** I don't think so. I think we talk a lot about the value of our products and the superiority of our products in a competitive marketplace. I don't think we would be as successful as we've been if we lived in the land of 'no comment.' But one of the great things about an organization like ACC is that it gives communicators at a wide range of companies the chance to come together and share experiences and strategies for relating to the media, communicating messages and doing this work. **Talk to me about what ACC is doing to adapt to cable's consolidation, which includes moving Forum to Denver for this year's Cable Connection Fall week.** For our part, we've gone from a relatively small meeting every spring in DC to trying to integrate with a large trade show. There have been some challenges, but one of the things really helpful to us is that over the last few years we've really tried to build our activities up outside of the confines of that one event. We've developed a communications institute that is an important annual event for ACC... We've tried to build up the Website and add more active activities, like online chats, Webinars. **Forum is still a huge part of ACC. Do you have any indication what may happen attendance wise?** I think every organization is challenged to some extent. There's a hope on everyone's part that people will start to focus after Labor Day on that event and registrations will start to kick in. **What's the future of ACC look like? Is there support there to keep it going as its own entity?** ACC is unique, and one of the reasons I'm happy I've been involved in it is that it's an organization devoted to a specific function and run by a board of professionals who all share that function even though their individual roles differ... We're lean and financially sound, and I think there's a need in the industry for a group focused on communications as a function both because of changes happening inside the cable industry and the fact that communications itself, as a function, is changing so dramatically. **You've been part of ACC for years. What have you taken away?** The moments that have meant the most are the opportunities I've had to come together with the people who do what I do for a living, in whatever form, and... those are the kinds of moments we're trying to enable

**Ouch!** Sending healing wishes to **NCTA** pres/CEO *Kyle McSarrow*. If you've seen him lately, you've probably noticed the large boot cast he's sporting. For the record, McSarrow tore his Achilles tendon playing in his son's parent-child soccer game, not in an Unserved vs Underserved pick-up basketball game with *Julius Genachoswki*.

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## CableFAX Week in Review

Company	Ticker	9/04 Close	1-Week % Chg	YTD %Chg
<b>BROADCASTERS/DBS/MMDS</b>				
BRITISH SKY:	BSY	35.31	(0.8%)	27.40%
DIRECTV:	DTV	25.05	0.40%	9.30%
DISH:	DISH	17.23	2.20%	55.40%
DISNEY:	DIS	25.90	(3.5%)	15.70%
GE:	GE	13.87	(1.5%)	(7.4%)
NEWS CORP:	NWS	12.91	(0.2%)	36.00%
<b>MSOS</b>				
CABLEVISION:	CVC	23.17	2.90%	40.60%
COMCAST:	CMCSA	16.33	3.90%	(1.3%)
COMCAST SPCL:	CMCSK	15.90	7.00%	0.50%
GCI:	GNCMA	6.90	3.80%	(14.7%)
KNOLOGY:	KNOL	7.35	(2.8%)	42.40%
LIBERTY CAPITAL:	LCAPA	19.83	1.60%	321.00%
LIBERTY ENT:	LMDIA	28.06	0.00%	60.50%
LIBERTY GLOBAL:	LBTYA	23.06	2.50%	44.80%
LIBERTY INT:	LINTA	9.71	0.50%	211.20%
MEDIACOM:	MCCC	5.18		20.50%
RCN:	RCNI	9.13		
SHAW COMM:	SJR	17.47	3.70%	4.60%
TIME WARNER CABLE:	TWC	37.29		
VIRGIN MEDIA:	VMED	11.80	(1.1%)	140.50%
WASH POST:	WPO	437.27	(3.7%)	14.80%

<b>PROGRAMMING</b>				
CBS:	CBS	10.60	(1.7%)	31.90%
CROWN:	CRWN	1.70	(9.1%)	(40.4%)
DISCOVERY:	DISCA	26.10	0.90%	84.30%
EW SCRIPPS:	SSP	7.02	(3.1%)	218.40%
GRUPO TELEVISIA:	TV	17.03	(4.5%)	22.70%
HSN:	HSNI	11.03	2.70%	51.70%
INTERACTIVE CORP:	IACI	18.78	0.60%	19.30%
LIBERTY:	L	32.82	(3.8%)	16.80%
LODGENET:	LNET	6.39	(10.4%)	812.90%
NEW FRONTIER:	NOOF	2.19	(0.9%)	28.80%
OUTDOOR:	OUTD	6.89	1.20%	(8%)
PLAYBOY:	PLA	2.67	(3.6%)	23.60%
RHI:	RHIE	2.63	2.30%	(67.6%)
SCRIPPS INT:	SNI	33.38	2.10%	53.20%
TIME WARNER:	TWX	28.05	(1%)	28.00%
VALUEVISION:	VVTV	3.12	(3.4%)	845.50%
VIACOM:	VIA	26.39	(0.3%)	31.20%
WWE:	WWE	14.31	(0.1%)	45.40%

<b>TECHNOLOGY</b>				
3COM:	COMS	4.02	(8.4%)	76.30%
ADC:	ADCT	8.04	(10.5%)	47.40%
ADVANTAGE:	AEY	2.09	6.60%	17.40%
ALCATEL LUCENT:	ALU	3.59	(4.5%)	67.00%
AMDOCS:	DOX	24.91	2.50%	36.20%
AMPHENOL:	APH	35.40	0.20%	47.90%
APPLE:	AAPL	170.31	0.20%	99.50%
ARRIS GROUP:	ARRS	13.15	(1.8%)	65.40%
AVID TECH:	AVID	12.55	(5.6%)	15.00%
BIGBAND:	BBND	3.91	(1.5%)	(29.2%)
BLNDER TONGUE:	BDR	1.24	(0.8%)	22.80%
BROADCOM:	BRCM	28.46	(1.1%)	67.70%

Company	Ticker	9/04 Close	1-Week % Chg	YTD %Chg
CISCO:	CSCO	21.84	(0.7%)	34.00%
CLEARWIRE:	CLWR	7.50	(4%)	88.90%
COMMSCOPE:	CTV	26.04	(6.3%)	67.60%
CONCURRENT:	CCUR	4.45		32.40%
CONVERGYS:	CVG	10.78	(3.8%)	68.20%
CSG SYSTEMS:	CSGS	14.94	(3.7%)	(14.5%)
ECHOSTAR:	SATS	18.00	(6.6%)	21.00%
GOOGLE:	GOOG	461.30	(0.7%)	49.90%
HARMONIC:	HLIT	6.56	(2.4%)	16.90%
INTEL:	INTC	19.64	(3%)	48.30%
JDSU:	JDSU	7.02	1.10%	91.30%
LEVEL 3:	LVL	1.16	(5.7%)	65.70%
MICROSOFT:	MSFT	24.62	(0.2%)	29.30%
MOTOROLA:	MOT	7.73	7.20%	75.60%
OPENTV:	OPTV	1.28	(3.8%)	4.10%
PHILIPS:	PHG	22.80	(0.8%)	24.00%
RENTRAK:	RENT	15.95	(3.2%)	35.30%
SEACHANGE:	SEAC	7.63	(15.2%)	5.80%
SONY:	SNE	26.51	(2.9%)	21.20%
SPRINT NEXTEL:	S	3.81	1.10%	108.20%
THOMAS & BETTS:	TNB	28.09	(1.6%)	16.90%
TIVO:	TIVO	10.41	4.10%	45.40%
TOLLGRADE:	TLGD	5.70	2.90%	19.20%
UNIVERSAL ELEC:	UEIC	17.26	(10.8%)	6.40%
VONAGE:	VG	1.50	9.50%	127.30%
YAHOO:	YHOO	14.50	(2.4%)	18.90%

<b>TELCOS</b>				
AT&T:	T	25.51	(2.7%)	(3.3%)
QWEST:	Q	3.46	(8%)	3.80%
VERIZON:	VZ	30.60	(1.4%)	(2.9%)

<b>MARKET INDICES</b>				
DOW:	INDU	9441.27	(1.1%)	7.60%
NASDAQ:	COMPX	2018.78	(0.5%)	28.00%

### WINNERS & LOSERS

#### THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. VONAGE:	1.50	9.50%
2. MOTOROLA:	7.73	7.20%
3. COMCAST SPCL:	15.90	7.00%
4. ADVANTAGE:	2.09	6.60%
5. TIVO:	10.41	4.10%

#### THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. SEACHANGE:	7.63	(15.2%)
2. UNIVERSAL ELEC:	17.26	(10.8%)
3. ADC:	8.04	(10.5%)
4. LODGENET:	6.39	(10.4%)
5. CROWN:	1.70	(9.1%)

## CableFAX PROGRAM AWARDS Awards Luncheon

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Questions: Saun Sayamongkhun at 301-354-1610; [ssayamongkhun@accessintel.com](mailto:ssayamongkhun@accessintel.com).

# MaxFAX...

## A Sporting Chance?

On Sunday, the day before no one really did any "labor" on Labor Day (except maybe drive home), the guys at "SportsCenter" on **ESPN** were laboring away as they always do.... this time on the 30th Anniversary of starting something that we



Paul S. Maxwell

simply cannot stop watching and/or laughing... with?... at?... along with?... ahead of?... behind?

Meanwhile, **Versus** and **DirectTV** were at loggerheads as this goes to press...

So I fervently hope all of you who don't work for those two companies had a really terrific long weekend.

But sports remains the *raison d'être* for a lot of high-value subscribers, upgrades to Hi-Def and more... so... let's not dwell on missing the NHL in Hi-Def and concentrate on how to get ready for the two biggest sporting events in 2010... so you can make a pile off local ads, too.

And ads against sporting affairs aren't constrained like those in political affairs. And, yep, there are going to be quite a lot of political affairs to cover and/or exploit next year. Fringes on both extremes are going to make for a lively political season, too.

But back to where it is easier to keep score... right now you should be looking for local angles... folks who will be trying to qualify for Olympic events and/or the world's premier event in futbol.

And don't forget the American football event (the Super Bowl pitting the Houston Texans against the Dallas Cowboys—hah!) on **CBS** on Sunday, February 7th... think of it as a launching point for **NBCU's** wall-to-wall coverage of the winter games in a better time zone (from Friday, February 12th thru the 28th LIVE from Vancouver, Squamish—for traffic jams—and Whistler/Blackcomb in British Columbia—they even speak, mostly, English, eh?).

And that's just another warm up for the World Cup from Friday, June 11th thru Sunday, July 11th from all over South Africa on ESPN. Cape Town, one of the sites of matches, is—like Vancouver—one of the world's truly great cities.

If you're a true sports junkie, you'll get to visit Miami in February, the BC inland passage (between Vancouver and Whistler/Blackcomb along the Sea-to-Sky Highway) in February and fascinating, beautiful and challenging South Africa in June/July...

Can I carry your luggage along?

Remember, local angles sell local

ads... so get started on the right research.

## Random Notes:

• **Cable's Basic Champion?** Easy... **Insight**—the #13 multi-platform player. Only four major multiplatform players gained basic subscribers year over year from second quarter 2008 to second quarter 2009. And Insight was the only cable operator to do so... up 31,100 new subscribers for a gain of 4.5%. (We're speaking about video subs here, but, if you'd like a look at top line data for VoIP, broadband and/or digital, let me know --- hot and just now post-analysis.) The other "growth" companies were two of the obvious—**AT&T U-Verse** and **Verizon FiOS**—and one from the sky—**DirectTV**. The two telco challengers are growing partly because they are building out while incumbents are, at best, upgrading. DirectTV seems more focused on its favorite customers... but the showing by Insight should give some challenge to the other nine major MSOs that didn't quite do so well...

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## CableFAX: The Magazine's Most Influential Minorities in Cable Issue

Publication Date: October 27

This issue profiles the most influential minorities in cable, winners of NAMIC's EMMA Awards (Excellence in Multicultural Marketing Awards), and the Top 10 Places to Work.

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