

CableFAX Daily™

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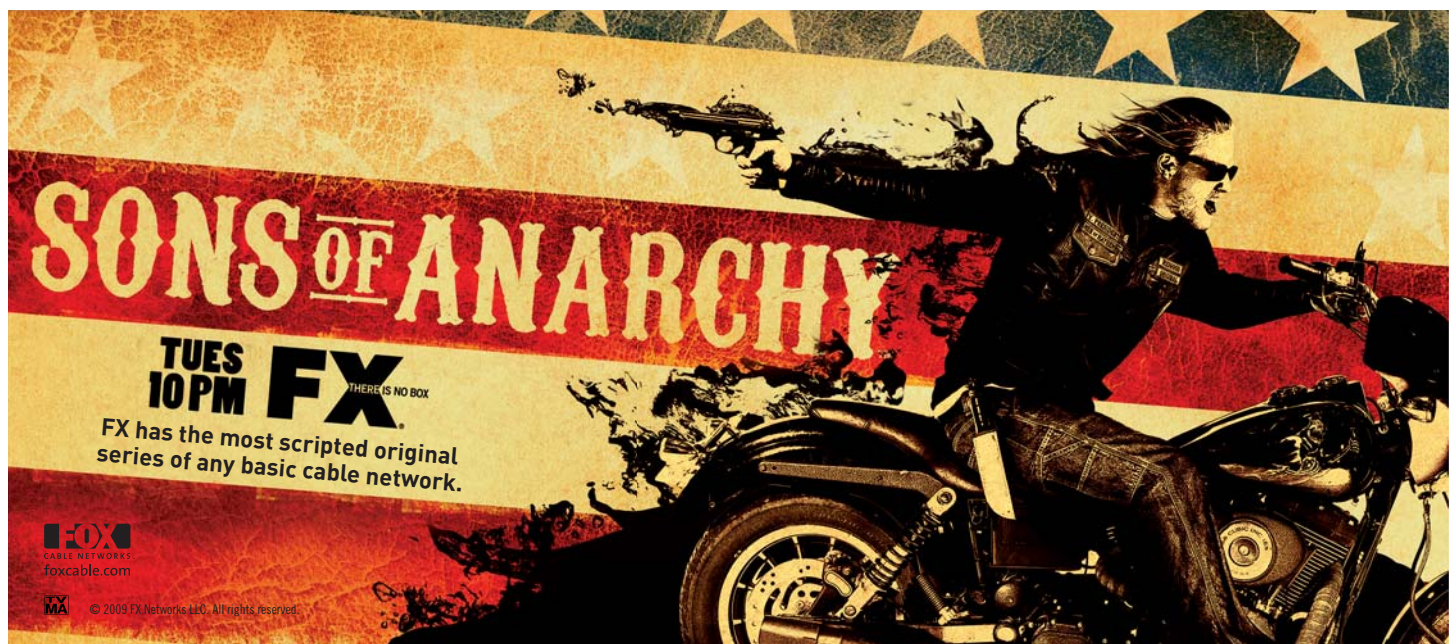
What the Industry Reads First

Volume 20 / No. 174

Going For Granularity: Heavy-Hitting Group Eyes Measurement Efficacy

The staggering breadth of products and services aimed at delivering multi-platform content to consumers is a tangle of technology, perhaps rivaled only by attempts to accurately measure related consumption patterns. Enter the 14-company **Coalition for Innovative Media Measurement (CIMM)**, which seeks to “provide a big tent where [industry] measurement” needs covering ad and content engagement can be addressed through research and development of more functional methods and tech, said **NBCU** pres, research *Alan Wurtzel*—stressing that the coalition’s goal isn’t “to provide an alternative to Nielsen.” Besides NBCU, the group includes **Time Warner, Viacom, Discovery Comm, ESPN, Disney/ABC TV Group, News Corp** and various media buyers and advertisers, who all jointly funded the project with a 7-figure total of 1st-yr “seed money,” said **Turner** chief research officer *Jack Wakshlag*. CIMM will issue to vendors RFPs for the development of innovations initially focused on set top and cross-platform measurement—more consistent and reliable Web metrics, for example—and the results of all the research will be publicly disclosed. Plans do not include marketing and/or selling any of the developed tech. “The most important thing for all of us is to get... a real sense of what’s going on, how customers are viewing content and interacting with ads,” said Wurtzel. Added **Starcom MediaVest Group** Global CEO *Laura Desmond* in a release: “It’s a new media ecosystem, yet the industry relies on old media metrics. This simply can’t continue.” CIMM hopes soon to hire an exec dir, who will report to a board. Plans call for additional participants/members, a list that could eventually include Nielsen. “Broad and deep participation is the only way this will work,” said Wurtzel.

Cost of Food: Scripps Nets Interactive is continuing to work on renewal deals for Food, with execs saying that most video providers have acknowledged the need to reset affiliate fees. “There is agreement among the cable operators and satellite providers that Food is a quality brand. They all agree, sometimes to their chagrin, that the network is just red hot in ratings, and they know that their subscribers love this network,” pres/CEO *Ken Lowe* said at a **Merrill Lynch** investor conference Thurs. “The cable operators know in particular know that this is a great asset for local ad sales. There’s agreement that we’re probably undervalued.” Still, he described negotiations as “arduous” but believes that Scripps will “come out very much where we expected to when we started this process a few months ago.” Scripps brought former **Time Warner Cable** exec *Lynne Costantini* on board last year to lead the affiliate charge. The net has affiliation agreements up



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this year affecting about 75% of cable and satellite distributors, and it marks only the 2nd time Scripps has had a chance to set the net's rate card. As for chatter that Scripps may purchase **Travel Channel**, Lowe called it pure speculation at this point, though he acknowledged the company is interested in looking at it. "It's a great asset. Not many times do networks in 95mln households come on the market, but beyond that it's too early to comment one way or another," he said.

Z Signs on the X: Discovery Comm extended pres/CEO *David Zaslav's* contract through Feb 1, 2015. The extension came more than 2 years before his contract was up, with chmn *John Hendricks* saying that the board wanted to secure his leadership and provide the company with long-term stability. "By any measure or metric, Discovery Communications has had a terrific performance, and securing David's leadership gives me great confidence, the best is yet to come," he said. In addition to more stock, Discovery increases Zaslav's base salary to \$3mln, starting on Jan 1, '11, according to an **SEC** filing. His annual incentive compensation plan target will be increased to \$4mln this year, with annual increases of \$500K from '10-'14. No more guaranteed bonus, with any amount hinging on the achievement of performance criteria.

BOA Notebook: At the **Bank of America** conference Thurs, **Time Warner Cable** chmn/CEO *Glenn Britt* hinted at an imminent launch in the Carolinas of a mobile broadband laptop card, and that Dallas will follow later this year and HI early next. A spokesperson specifically named Charlotte, Raleigh and Greensboro. The 4G network looks "very promising," said Britt, delivering speeds that are "pretty exciting." -- Cable's TV Everywhere push fits snugly into Time Warner Cable's conceptual framework going forward, which Britt dubbed the 4 Anys: customers want access to any content, any content at any time, any content on any device and access to anything from any place. "The key to our future is to make this simple for consumers," he said. **Discovery Comm** svp/CFO *Brad Singer* said "this is a business model in the making" and added that Comcast's OnDemand Online trial helps programmers maintain rev streams by featuring advertising sans a skipping function. -- 3Q scatter pricing "has firmed up" over 2Q, said Singer, and is running at approx 8-12% higher than upfront pricing though it's still down YOY in absolute dollars. Discovery sold 45% of its inventory during its upfront, compared to 50% a year ago. Britt, meanwhile, said local advertising is ramping up, albeit as YOY comparisons remain "very weak." On Wed evening, **News Corp** pres/COO *Chase Carey* noted a less-than-2% decline in YOY upfront pricing for the company's TV nets, and **Cablevision** management noted sequential ad market improvement, particularly among the automotive and political segments. -- CVC plans to roll out this fall a free service letting voice customers to pause live TV with caller ID.

Launch Pad: **Cablevision** rolls out its high school sports and activities net **MSG Varsity** Sept 24. In addition to a 24/7 net zoned for 4 regions in the tri-state area, the initiative will include an interactive channel that allows viewers to select content, photos, sports stats and more as well as MSGVarsity.com (which will include customizable Websites for each school covered by the net). So far, 35 schools have signed on to participate, with MSG Varsity's gm *Theresa Chillianis* tell-

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BUSINESS & FINANCE

ing us that the CVC-exclusive service is close to getting deals with up to 100 schools. Not bad considering school's barely started. "This idea has actually been percolating for a couple years," said Chillianis, who most recently served as svp of strategy and business ops for **Fuse**. "Kids today are capturing their stories already, and we thought this might be the right time to give those kids... an opportunity to do so." In addition to the net's professional productions, school-generated content will also be a part of the service. Students and faculty will be provided with multimedia training. No immediate plans for ads on Varsity, but Chillianis said that may come down the road.

Programming: **Discovery** announced "Curiosity: The Questions of Our Life," a 5-year, multi-million dollar project that will tackle questions and mysteries in fields such as space, biology, geology, medicine, physics, tech, nature, archaeology, history and the human mind. Discovery founder/chmn *John Hendricks* will lead the 1-hour eps. Curiosity will begin airing in Jan '11, addressing 12 questions over 12 one-hour eps each year. The series also will feature K-12 educational content, including classroom tools, teacher guides and supplemental materials delivered through Discovery Education. -- Journalist *John Stossel* of "20/20" fame has signed a multi-year deal to anchor a weekly program on **Fox Business News** called "Stossel." He'll also make regular appearances on **Fox News**.

CableFAX Daily Stockwatch

Company	09/10 Close	1-Day Ch	Company	09/10 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	36.26	1.25	AMPHENOL:	38.49	0.74
DIRECTV:	25.52	0.50	APPLE:	172.56	1.42
DISH:	17.03	0.08	ARRIS GROUP:	13.26	0.25
DISNEY:	28.36	1.41	AVID TECH:	13.60	0.59
GE:	14.80	(0.07)	BIGBAND:	3.96	0.14
NEWS CORP:	13.65	0.43	BLNDER TONGUE:	1.22	0.02
MSOS					
CABLEVISION:	24.37	0.35	BROADCOM:	30.55	1.21
COMCAST:	17.15	0.30	CISCO:	23.01	0.78
COMCAST SPCL:	16.57	0.15	CLEARWIRE:	8.51	0.98
GCI:	6.84	0.11	COMMSCOPE:	29.26	1.12
KNOLGY:	7.73	0.05	CONCURRENT:	4.68	0.07
LIBERTY CAPITAL:	20.89	0.78	CONVERGYS:	11.05	(0.15)
LIBERTY ENT:	28.84	0.83	CSG SYSTEMS:	15.40	0.10
LIBERTY GLOBAL:	24.53	0.64	ECHOSTAR:	18.10	0.10
LIBERTY INT:	10.64	0.18	GOOGLE:	470.94	6.97
MEDIACOM:	5.63	0.08	HARMONIC:	6.99	0.28
RCN:	9.64	0.36	INTEL:	19.76	(0.17)
SHAW COMM:	17.48	(0.03)	JDSU:	7.60	0.23
TIME WARNER CABLE:	40.95	1.69	LEVEL 3:	1.23	0.06
VIRGIN MEDIA:	12.29	(0.12)	MICROSOFT:	25.00	0.22
WASH POST:	440.83	5.38	MOTOROLA:	7.97	0.12
PROGRAMMING					
CBS:	11.95	0.93	OPENTV:	1.35	0.06
CROWN:	1.75	0.01	PHILIPS:	24.66	0.03
DISCOVERY:	28.42	1.25	RENTRAK:	15.80	0.31
EW SCRIPPS:	7.64	0.38	SEACHANGE:	7.72	0.15
GRUPO TELEVISA:	17.78	0.30	SONY:	26.99	0.40
HSN:	12.05	0.07	SPRINT NEXTEL:	3.78	0.10
INTERACTIVE CORP:	19.53	0.04	THOMAS & BETTS:	29.38	0.35
LIBERTY:	34.06	0.28	TIVO:	10.83	0.04
LODGENET:	6.87	0.22	TOLLGRADE:	5.67	0.02
NEW FRONTIER:	2.19	0.00	UNIVERSAL ELEC:	20.79	2.28
OUTDOOR:	7.20	0.21	VONAGE:	1.37	0.02
PLAYBOY:	2.86	0.17	YAHOO:	15.45	0.67
RHI:	3.26	0.01	TELCOS		
SCRIPPS INT:	34.73	0.28	AT&T:	26.56	0.62
TIME WARNER:	29.51	1.04	QWEST:	3.61	0.18
VALUEVISION:	3.29	0.13	VERIZON:	31.35	0.46
VIACOM:	28.07	1.00	MARKET INDICES		
WWE:	14.51	(0.02)	DOW:	9627.48	80.26
TECHNOLOGY					
3COM:	4.74	0.31	NASDAQ:	2084.02	23.63
ADC:	8.88	0.35			
ADVANTAGE:	2.20	0.09			
ALCATEL LUCENT:	3.89	0.18			
AMDOCS:	26.07	0.27			

nip/tuck

OCT 14
WEDS 10 **FX**
THERE IS NO BOY

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PROGRAMMER'S PAGE with Chad Heiges and Seth Arenstein

Going For A Ride

Motorcyclists are well acquainted with whipping wind, but no one at **FX** was prepared for the gale-force viewership produced by the 2nd-season premiere of biker gang drama "Sons of Anarchy." The Tues night ep earned 4.29mln total viewers and 3mln 18-49s, the latter metric up 95% over the series premiere, best ever for a net show and sufficient to make the ep FX's most-watched scripted series telecast in the demo this year. Moreover, its 1.97mln male 18-49 viewers established an ep delivery record for the net and topped all basic cable series this year. 10-20% growth in 18-49 delivery was expected for SOA and a comparatively mere 30-40% increase would've had the net "dancing the Snoopy dance," said pres/gm *John Landgraf*—so perhaps random displays of break dancing or The Twist have become commonplace this week. The show's '08 performance portended success, as it was "far and away the most consistent we've ever had" in terms of ep-to-ep viewership, said Landgraf. Plus, the series was the 2nd-most searched new show (broadcast or cable) on **Yahoo!** last fall behind **The CW's** "90210." Still, the results were "not anywhere in my field of vision," said Landgraf, noting that less was spent on marketing this premiere than was spent a year ago. However, this year's push was more targeted (mainly to males in sports-oriented environments) and therefore more effective, said Landgraf, who also cited word-of-mouth by the show's existing fan base as key to the audience horsepower. To add intrigue for existing fans and to deeply engage fresh eyes to the show, Landgraf asked writer *Kurt Sutter* to add a new twist to an already compelling plot, and he delivered a fascinating jolt. Viewership may slip a bit this season from a heady altitude, but it won't be due to inferior content. *CH*

Highlights: "Inside the Actors Studio," Mon, 8pm, **Bravo**. Hilarity: straight-faced *James Lipton* questions "The Family Guy" cast about "inter-species sex... with a condom" and Lipton's chat with Stewie. *SA*

Worth a Look: "The Girl Who Cries Blood," Sun, 9pm, **Nat Geo**. The vampires who cry blood on "True Blood" (season finale, Sun, 9pm, **HBO**) aren't alone. An Indian teen, *Twinkle*, bleeds spontaneously from her eyes, ears, hands, neck and chest. While spontaneous bleeding is known, this case has doctors baffled. Some feel it's a hoax. Only 24/7 monitoring will settle the debate. Now that's a special we'd watch. -- "The Burning Plain," Wed, 8pm ET, **HDNet Movies**. *Mark Cuban* again lets subs see a film before its theatrical release. And their quality keeps improving. This one is a disjointed tale of infidelity and lust, with *Charlize Theron* and *Kim Basinger* supplying plenty of both. *SA*

Notable: "Jay-Z Live From MSG: Answer the Call," Fri, 9pm, **Fuse**. A 9/11 tribute with all proceeds benefitting widows and children of firefighters and police killed during 9/11. -- "102 Minutes that Changed America," Fri, 8pm, **History**. A repeat of one of the most intense 9/11 docs we've seen. A pastiche of 100 videographers' footage from 9/11; no narration, just sounds of the day, including 9/11 calls from the Towers. *SA*

Basic Cable Rankings			
(8/31/09-9/06/09)			
Mon-Sun Prime			
1	ESPN	2.8	2782
2	USA	2.1	2125
3	DSNY	1.9	1822
4	FOXN	1.6	1597
4	TNT	1.6	1584
6	NAN	1.5	1495
7	A&E	1.3	1268
8	HGTV	1.2	1212
8	TBSC	1.2	1197
10	ESP2	1.1	1037
11	TOON	0.9	928
11	SYFY	0.9	910
11	FAM	0.9	893
11	FX	0.9	879
11	HIST	0.9	869
11	LIFE	0.9	844
11	HALL	0.9	795
18	DISC	0.8	838
18	FOOD	0.8	806
18	TRU	0.8	781
18	BRAV	0.8	762
18	TLC	0.8	759
23	CNN	0.7	741
23	SPK	0.7	737
23	CMDY	0.7	715
23	AMC	0.7	635
23	MSNB	0.7	612
23	LMN	0.7	487
23	NOGG	0.7	462
23	NFLN	0.7	349
31	VH1	0.6	554
32	MTV	0.5	518
32	TVLD	0.5	508
32	BET	0.5	490
32	EN	0.5	444
32	NGC	0.5	367
32	SOAP	0.5	331
38	HLN	0.4	426
38	APL	0.4	367
38	OXYG	0.4	319
38	WE	0.4	275
38	GSN	0.4	249
38	ID	0.4	205
44	TRAV	0.3	327
44	CMT	0.3	259
44	WGNA	0.3	232

*Nielsen data supplied by ABC/Disney