

CableFAX Daily™

Friday — September 17, 2010

What the Industry Reads First

Volume 21 / No. 180

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What the Industry Reads First

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McSlarrow: Lawmakers Targeting Telecom Act, Broadband Talks Continue

While it's part of *Kyle McSlarrow's* job to monitor electoral races, the NCTA chief told an ACC breakfast session the House results won't matter when it comes to legislators' interest in re-examining telecom policy, particularly the '96 Act. There's interest in both parties to tackle telecom legislation, he said, adding cable is a bi-partisan player with relationships on both sides of the aisle. He also reiterated NCTA won't accept Title II and will resort to the courts, if necessary. "People are trying" on the issue, he said, noting there was a 10pm conference call after the Kaitz dinner and another Thurs morning at 7. "It's all I've been doing," he said. On retrans, McSlarrow expects little movement until after the mid-term elections in Nov. There won't be "a true fix" on retrans without Congress acting, he predicted. He admitted he spends a fair amount of time attempting to play peacemaker between warring sides in public retrans fights. He was sanguine on pole attachment fees, saying NCTA has won "the philosophical argument," although he wouldn't predict a final outcome. In a nod to cable communicators, McSlarrow said industries "get in trouble" when the public doesn't know about them. He urged the group to publicize cable's innovation and cutting-edge products, and "I think you'll find the rest will take care of itself." **Notes:** It was interesting to hear **Comcast** svp/**Comcast Foundation** pres *Joe Waz* expound on the MSO's retrans strategy during a communications roundtable. "We've never pulled a broadcast signal... we work to make sure we don't let it get to that point... our goal is to avoid a public flare-up," he said. When Comcast gets in brawl (on any issue), Waz said he tries to move conversations away from the extremes and toward the middle. "Know your audience," he added. **Time Warner Cable** vp *Rachel Welch* emphasized the importance of building alliances, since cable now crosses multiple industries, regions and political parties. Following that point, **ESPN** svp *Rosa Gatti* expressed concern with communicators relying too much on electronics. "Getting out of the office" for face-to-face meetings with reporters and other stakeholders are crucial, she said.

BOA Notebook: Going live in Jan, **OWN** is "doing better than we expected" on the ad front, said **Discovery Comm** pres/CEO *David Zaslav*, having scored healthy upfront business and multi-year deals with **P&G** and **Kohl's**. But affil fee growth may provide the most upside for the *Oprah*-dominated net. During the **Bank of America** conference Thurs, Zaslav said **Discovery Health**, which OWN will replace, is unlike any other DISCA net in that it generates



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LIVE!	Thursday, Oct. 21 ST	7:00PM ET	Sacramento @ Florida
LIVE!	Thursday, Oct. 28 TH	8:00PM ET	Las Vegas @ Omaha
LIVE!	Friday, Nov. 5 TH	8:00PM ET	Omaha @ Florida
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CABLEFAX DAILY (ISSN 1069-6644) is published daily by Access Intelligence, LLC ● www.cablefaxdaily.com ● fax: 301.738.8453 ● Editor-in-Chief: Amy Maclean, 301.354.1760, amaclean@accessintel.com ● Exec Editor: Michael Grebb, 301.354.1790, mgrebb@accessintel.com ● Assoc Editor: Chad Heiges, 301.354.1828, cheiges@accessintel.com ● Asst VP, Ed Director: Seth Arenstein, 301/354-1782, sarenstein@accessintel.com ● Publisher: Debbie Vodenos, 301.354-1695, dvodenos@accessintel.com ● Assoc Publisher: Amy Abbey, 301.354.1629, aabbey@accessintel.com ● Marketing Dir: Carol Brault, 301.354.1763, cbrault@accessintel.com ● Prod: Joann Fato, 301.354.1681, cdaily@accessintel.com ● Diane Schwartz/VP and Group Publisher ● Subs/Client Services: 301.354.2101, fax 301.309.3847 ● Group Subs: Carol Brault, 301.354.1763, cbrault@accessintel.com

very little sub fees. So there's "a meaningful opportunity there... we should be able to get value over time," said Zaslav, noting ongoing talks with distributors. In the interim, DISCA will continue to invest in content to help build strong brands and increase audience levels, said Zaslav, noting particular bullishness on **Animal Planet** and **Investigation Discovery** domestically, and on **Science Channel** internationally. Overall ad sales remain robust, he said. -- As **DirectTV** evp/CFO *Pat Doyle* said the DBS op's '10 momentum hasn't stalled much at all in recent weeks and months, he suggested Wed a less rosy picture for premium nets. "It's a different equation today" for premium nets, said Doyle, citing dips in consumer spending while adding that "clearly some people are going back to over-the-air [TV] until things get better." And echoing the Wed sentiments of **Time Warner Cable** CFO *Rob Marcus*, Doyle said DirectTV sees very little incentive to add **Epix** after the net inked a content deal with **Netflix**.

Kaitz Dinner: *Oprah* showed up at **Kaitz!** OK, it was only by video to congratulate **Discovery** on its Diversity Champion award—and she didn't tell us we were all going to Australia—but it was a nice gesture nonetheless. Discovery chief *David Zaslav* accepted the award on behalf of his employees, thanking well-wishers "after a tough two weeks at Discovery" following a hostage situation at the company's Silver Spring HQ (*Cfax*, 9/2). And he praised the industry's diversity progress but urged even more work in the future. "It's about people," he said. "We've got a long way to go, and we need to continue to work together." Kaitz raised \$1.5mln this year. Also recognized at the dinner, attended by more than 1100 execs, was Diversity Advocate Award honoree Rep *Doris Matsui* (D-CA). -- Meanwhile, 2 **TLC** employees were featured on "The Oprah Winfrey Show" Thurs, describing for the 1st time how they were taken hostage at the Discovery Comm HQ.

Comcast-NBCU: The **Coalition for Competition in Media**, which includes **Bloomberg**, **Free Press** and **Wealth TV**, sent letters Thurs to House and Senate Commerce leaders requesting a "final hearing" on the **Comcast-NBCU** proposal. The group argues that new economic analyses and petitions to deny the deal have been filed since the committees' last hearings. "The recent emergence of new opposition and the new, in-depth analysis that they have brought forward adds multiple new dimensions to the discussion," they wrote. A Comcast spokesperson said there have been an "unprecedented" number of public hearings, 6 Congressional hearings, an **FCC** public forum and "one of the longest comment periods in Commission history... Congress, the FCC and **DOJ** should reject the delaying tactics of this group driven by a few special business interests, and the review process should continue without interruption. We continue to believe this transaction will close by year-end," the Comcast rep said.

In the States: **Blue Ridge Comm** launched **Fourth Wall Media's** "My Football Tracker" throughout its footprint. The free interactive app allows football fans and fantasy football enthusiasts to view real-time stats and scores through their remote, plus YTD team and player stats. -- **Cox** launched **CBS College Sports** (HD and SD) in Northern VA. -- **DISH** now delivers in-state local channels to Vermonters in Bennington and Windham counties at no additional charge. Bennington residents continue to receive stations from Albany, NY, and Windham residents still receive channels from Boston. DISH said **Nielsen** DMAs prevented it from delivering in-state channels before, but said it worked with govt officials, including Sen *Patrick Leahy* (D-VT), on the arrangement.

Retrans: Independent programmers, including **Outdoor**, **Starz**, **Africa Channel**, **Retirement Living** and **GMC**, are continuing to push for an **FCC** revamp of retrans rules. A group of non-broadcast affiliated programmers met with key members of Congress Thurs seeking support for FCC action and sent a letter to members calling for action. "Unlike broadcasters, we have no special government granted privileges, such as mandatory carriage rights or basic tier placement guarantees," the programmers in the **America Television Alliance** wrote. "Moreover, the bundling tactics of broadcasters allow them to capture a disproportionate share of the diminishing number of channels available for video programming, leaving fledgling and established independent programmers—and the audiences we seek to serve—at a distinct disadvantage."

Beacons: **C-SPAN's** free, searchable video library walked away with **ACC's** highest honor, the Golden Beacon, at its Beacon Awards lunch in NY Thurs. In all, 46 Beacon awards were presented to MSOs, cable systems, programmers and cable associations. **Time Warner Cable** received the most Beacon Awards, including recognition for its "Connect a Million Minds" initiative. There were several 1st-time winners, including **Suddenlink**, **Sportsman Channel** and **Ovation**. ACC tried a new format this year. Winners were announced as normal, but trophies were distributed at the end of the ceremony in an adjacent reception room, where all enjoyed coffee and cake. Only Golden Beacon winner C-SPAN was allowed to make a speech. This format resulted in the Beacons being awarded in a brisk 28 minutes. -- In a gra-

cious speech, C-SPAN co-COO *Susan Swain* thanked cable and C-SPAN's board for its support of the project to digitize the network's entire library and make it all accessible to the public. The board didn't hesitate, she said. To get DC pundits to write about the project, C-SPAN sent out clips of the earliest appearances of journalists on the network. "We saw clips of *Wolf Blitzer* when his beard wasn't white," she said. But then she quipped that the archive also contains "27 years of bad hairdos" of a certain C-SPAN anchor, she said, referring to herself.

New Tune: Fuse named former **Joost.com** exec *David Clark* as evp, gm. Clark, previously evp, sales for **MSG Media**, has been acting as gm since June when former chief *Gavin Harvey* left to head **Sportsman Channel**.

Competition: U-verse TV started rolling out a feature that allows most customers to record 3 HD shows and 1 SD show simultaneously with their Total Home DVR.

Programming: TNT is ordering a sophomore season of *Jason Lee* series "Memphis Beat," which averaged 4.7mln viewers in Season 1.

ACC Notebook: As cable ops look for competitive advantage, localism remains a strength—and one that programmers can often aid with partnerships that create local goodwill. **Time Warner Cable** evp *Stephen Pagano* recalled an event with **Fox Business'** *Liz Claman* and the Lincoln, NE, Chamber of Commerce that strengthened ties with local officials. "Time Warner Cable was a good guy," he said during a Wed session. Beyond PR, such events can also affect the bottom line, with Pagano praising a May partnership with **Univision** to promote its new Spanish-language VOD product with a big stadium event that drew 7000 attendees. "Our video usage just went through the roof after that event," he said. **Ovation** vp, mktg *Debra Balamos* recounted campaigns with Time Warner Cable in L.A. and NYC to save arts programs that were on the chopping blocks. "Art is a national interest, but we all experience it locally," she said. But as cable ops and programmers work together on local partnerships and promotions, **Cox VA** vp, public affairs *Leigh Ann Woisard* said it's important to craft "multi-dimensional" campaigns that also include measurable goals. "How are we going to make sure it drives some actual sales for us?" she asked. "It's really got to move the needle for us."

NAMIC Notebook: Integrating social media into TV shows can in some cases mitigate time-shifting, noted **NBCU** vp, digital networks *Devin Johnson* during a Wed session. "They become DVR busters," he said, especially when it comes to reality shows, live events and sports. "It really adds a lot of value in the television world." The trick is making such integrations organic for shows and viewers. "It's important to do all of these things, but it's important not to force it," said **A&E** vp, intl *Sean Cohan*, who noted much upside in traditional linear platforms—especially in intl markets. But when social integration works, it shouldn't be considered an "extension" to linear, said **MTVN** vp, biz dev *Pooja Midha*. "We need to create an ecosystem and an experience," she said. To that point, **Disney/ABC** vp, biz affairs *Nichole Smith* said Millennials and under increasingly value "social consensus" when picking shows to watch and brands to follow—so programmers must ensure they're creating truly organic communities around them. Noted **Bloomberg** gm/global head of mobile *Oke Okaro*: "It's critical that you know where your viewers are. If you're not there to serve them, someone else will."

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Deadline:
November 5, 2010

CableFAX's Best of the Web Awards is the industry's top honor in the digital space, recognizing outstanding websites and digital initiatives among cable programmers, operators, vendors and associations.

The CableFAX Best of the Web Awards will also salute the cable executives behind the scenes who make these digital initiatives shine. The awards are presented by the most trusted information source in cable: CableFAX Daily and sister brand CableFAX: The Magazine. The winners and honorable mentions will be saluted during at an awards event in April 2011 in New York City.

Sponsorship Opportunities: Debbie Vodenos at 301-354-1695; dvodenos@accessintel.com
Entry Questions: Elizabeth Brown at 301-354-1610; ebrown@accessintel.com

BUSINESS & FINANCE

Online: Disney/ABC TV Group and Nielsen announced the launch of the ABC's "My Generation Sync" iPad app. Released 1 week in advance of the premiere of the ABC primetime drama, the app lets users automatically synchronize to any episode (live or time-shifted) of the series and access exclusive interactive content produced by ABC as a companion to that specific point in the episode.

People: Rainbow Media tapped Sean Sullivan as chief corporate officer and David Epstein as evp, content and inventory strategy. -- Shari Levine was elevated to svp, production for Bravo. -- Cox named Jennifer Garrett vp, sales. -- Discovery Comm tapped Meg Lowe as svp, domestic distribution, effective Sept 30. -- Syfy upped Tim Krubsack to svp, alternative programming, Lucia Gervino to svp, prod and Erika Kennair to vp, original programming and dev. -- Sandra Schron was promoted to vp, prod for USA, Sleuth and Universal HD.

On the Circuit: Houghton Mifflin Harcourt is teaming with AETN for an exclusive, long-term partnership to teach social studies using History material. Elements include a streaming digital library, letting teachers search continually updated multimedia of more than 10K instructional resources. The partnership kicks off Fri with live Constitution Day event "We the People Live" in DC, which will be simultaneously webcast to more than 3500 schools across the country.

CableFAX Daily Stockwatch

Company	09/16 Close	1-Day Ch	Company	09/16 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
DIRECTV:	41.22	0.23	AVID TECH:	11.92	0.15
DISH:	18.69	0.01	BIGBAND:	2.78	(0.01)
DISNEY:	34.17	(0.04)	BLNDER TONGUE:	2.12	(0.02)
GE:	16.23	0.01	BROADCOM:	35.35	(0.04)
NEWS CORP:	15.33	(0.25)	CISCO:	21.93	0.34
MSOS					
CABLEVISION:	26.46	(0.54)	CLEARWIRE:	7.40	0.01
COMCAST:	17.57	(0.47)	COMMSCOPE:	21.72	(0.09)
COMCAST SPCL:	16.49	(0.45)	CONCURRENT:	6.43	0.10
GCI:	9.81	(0.13)	CONVERGYS:	10.35	(0.1)
KNOLOGY:	12.40	(0.22)	CSG SYSTEMS:	20.37	0.01
LIBERTY CAPITAL:	49.02	0.52	ECHOSTAR:	19.24	(0.18)
LIBERTY GLOBAL:	29.13	(0.5)	GOOGLE:	481.06	0.42
LIBERTY INT:	12.43	(0.17)	HARMONIC:	6.64	(0.28)
MEDIACOM:	6.25	(0.19)	INTEL:	18.97	0.25
SHAW COMM:	21.57	(0.08)	JDSU:	12.14	0.31
TIME WARNER CABLE:	50.96	(1.47)	LEVEL 3:	1.00	(0.04)
VIRGIN MEDIA:	21.75	(0.01)	MICROSOFT:	25.33	0.21
WASH POST:	357.16	(5.85)	MOTOROLA:	8.41	0.05
PROGRAMMING					
CBS:	15.24	(0.35)	RENTRAK:	22.99	(0.03)
CROWN:	2.24	0.06	SEACHANGE:	7.40	0.24
DISCOVERY:	41.56	0.02	SONY:	30.97	0.28
GRUPO TELEVISA:	19.12	(0.2)	SPRINT NEXTEL:	4.47	(0.11)
HSN:	29.29	(0.79)	THOMAS & BETTS:	41.04	(0.12)
INTERACTIVE CORP:	26.31	(0.02)	TIVO:	9.53	0.16
LIBERTY:	37.02	0.15	TOLLGRADE:	7.15	0.10
LIBERTY STARZ:	62.65	1.34	UNIVERSAL ELEC:	19.99	(0.16)
LIONSGATE:	7.27	(0.06)	VONAGE:	2.36	(0.04)
LODGENET:	2.70	(0.1)	YAHOO:	14.19	(0.08)
NEW FRONTIER:	1.75	0.04	TELCOS		
OUTDOOR:	5.49	(0.07)	AT&T:	28.11	0.10
PLAYBOY:	5.07	0.00	QWEST:	6.06	(0.01)
SCRIPPS INT:	45.36	(0.19)	VERIZON:	31.42	0.23
TIME WARNER:	31.41	(0.34)	MARKET INDICES		
VALUEVISION:	1.83	(0.07)	NASDAQ:	2303.25	1.93
VIACOM:	38.90	(0.26)			
WWE:	13.78	(0.02)			
TECHNOLOGY					
ADC:	12.71	0.02			
ADVANTAGE:	3.09	(0.01)			
ALCATEL LUCENT:	2.87	(0.03)			
AMDOCS:	27.44	0.13			
AMPHENOL:	46.89	(0.45)			
AOL:	23.34	0.25			
APPLE:	276.57	6.35			
ARRIS GROUP:	9.20	0.07			



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PROGRAMMER'S PAGE with Chad Heiges and Seth Arenstein

Tongue Tied

Univision pres *Cesar Conde* noted at **NAMIC** this week how the US Hispanic market is no longer a niche play. Indeed, Univision recently averaged more weekly 18-49s in prime than all other broadcasters for the 1st time ever, and the Hispanic demo helped power record **World Cup** ratings this past summer. Many cable ops are responding to the sea change by adding a plethora of Spanish-language nets, undoubtedly a shrewd move, and Hispanic-leaning cable nets such as **MTV Tr3s** and **Go!TV** are smartly attempting to capitalize on the trend. But while no doubt imperative, targeting the Hispanic market appears a much more difficult proposition for ops and programmers than is achieving resonance among other ethnic groups. In a recent study, for example, **Nielsen** said the "Hispanic/Latino community varies widely depending on factors such as country of origin, citizenship, education and socio-economic status... as a result, media consumption is just as varied." Consider: nearly a 3rd of the US Hispanics that primarily speak English at home still watch more than an hour/day of Spanish-language TV, while approx the same percentage of Hispanics that speak only Spanish watch at least an hour/week of TV in English. Seems like a brain teaser, I know, but at a respective 21% and 19% the corresponding data for daily Internet use/language seems more reasonable. Still, 15% of English-only Hispanics watch some Spanish-language TV, and 20% of the cohort spends some time with Spanish Web content. Yet programmers and marketers facing this conundrum can take heart in the fact that the vast majority of all 4 categories of Hispanics noted by Nielsen (also mostly Spanish) watch more than an hour/day of TV and surf the Web for more than 1 hour/day. Other notes: 72% of Hispanics have a computer at home, and the demo uses mobile phones and data apps more than avg. So at least the market's there for media players, if not a prescription for success. *CH*

Highlights: "Boardwalk Empire," pilot, Sun, 9p, **HBO**. Reportedly HBO's most expensive episode—press reports for the *Scorsese*-directed pilot range from \$20mIn-\$50mIn—the Box spent well. The costumes, sets, makeup and props are stunning. Attention to detail in the re-creation of Atlantic City's boardwalk of 1920 is exquisite—there's a storefront with baby incubators, sand was trucked in, an old-fashioned taffy-pulling machine is authentic, as are some of the costumes. As in HBO's strong post-Katrina series "Treme," music is given room to breathe. The tunes and performances are top notch. But how's the drama? Darn good. Our concern is viewers won't stick through the pilot, which plods in spots. In his defense, *Scorsese* had much ground to cover. Still, it's the viewers' loss if they exit. Empire grows on you, especially as screen time increases for the wonderful *Kelly Macdonald*, you get comfortable with *Steve Buscemi* and realize the cast rivals "Mad Men." Loaded with references to mob media, "Boardwalk" provides history, making one realize *Tony Soprano* owes much to *Al Capone*, *Lucky Luciano* and even *Nucky Thompson*. -- "Horse Sense & Soldiers," Sun, 10p, **Military**. "Horse Whisperer" *Monty Roberts* helps post traumatic stress disorder (PTSD) veterans by teaching them to break horses using his gentle method. It's a story of peace and trust, beautifully told. *SA*

Basic Cable Rankings			
(9/06/10-9/12/10)			
Mon-Sun Prime			
1	ESPN	2.8	2757
2	USA	2.1	2113
2	DSNY	2.1	2109
4	MTV	1.9	1853
5	TNT	1.8	1796
6	HIST	1.7	1676
7	FOXN	1.4	1361
8	A&E	1.3	1323
9	NAN	1.2	1248
9	ESP2	1.2	1211
11	HGTV	1.1	1090
11	TBSC	1.1	1087
11	AMC	1.1	1044
11	FX	1.1	1034
15	TOON	1	1035
15	LIFE	1	951
15	SYFY	1	938
18	FAM	0.9	877
19	TLC	0.8	800
19	DISC	0.8	787
19	FOOD	0.8	769
19	BRAV	0.8	761
19	TRU	0.8	737
24	CMDY	0.7	736
24	TVLD	0.7	704
24	HALL	0.7	604
24	LMN	0.7	591
24	NKJR	0.7	528
29	EN	0.6	600
29	MSNB	0.6	558
29	OXYG	0.6	467
32	SPK	0.5	518
32	BET	0.5	468
32	ID	0.5	330
35	CNN	0.4	439
35	VH1	0.4	399
35	TRAV	0.4	397
35	CMT	0.4	383
35	APL	0.4	381
35	NGC	0.4	314
35	NKTN	0.4	229
42	HLN	0.3	328
42	SOAP	0.3	257
42	GSN	0.3	242
42	DXD	0.3	228
42	WGNA	0.3	197

*Nielsen data supplied by ABC/Disney

CableFAX's Top Case Studies in Cable Marketing & PR Guidebook

THIS ONE OF A KIND BOOK, from the publisher of CableFAX, exemplifies how cable programmers, operators and vendors cut through the clutter to mount PR and Marketing efforts that worked, gained revenue, ratings points and industry buzz. Each study demonstrates some facet of ingenuity, innovation or integrated thinking, illuminating communications as a function that has matured with poise and established its indispensability to business practices.

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