

CableFAX Daily™

Tuesday — October 2, 2012

What the Industry Reads First

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RSN Rollout: TWC, Comcast's RSNs Light Up Mon Night While Still Negotiating

Time Warner Cable's L.A. RSNs and **Comcast SportsNet Houston** were both set to launch Mon evening, but the similarities don't end there. Neither has secured much (if any) distribution beyond their owner, and both have weeks before they really need to, with the **NBA** season not tipping off until Oct 30. "You're expecting this," said **LHB Sports, Ent & Media** pres/CEO *Lee Berke*. "The reality is if you take a look at the track record, it can take 1-3 years to get full distribution from scratch. The advantage is they are owned by [the largest distributors in the markets]. They have a lot of clout in the marketplace, and that's why the teams have gotten into bed with them." Negotiations on all sides are continuing, and it's sounding likely **DirectTV** and TWC SportsNet will have a deal by the end of the month. "The Lakers are important to L.A. fans who can rest assured DirectTV is very engaged with Time Warner Cable on how to best make the new TWC SportsNet available in all our local customers' homes," said a DirectTV statement, which said that as the 2 largest MVPDs in L.A., both have a responsibility to avoid extraordinary increases to customers' bills. "We plan to carry TWC SportsNet in a way that is affordable to everyone." A **Cox** spokesman said the MSO understands that the Lakers are popular sports programming, but that programming comes "at an extremely high price that includes direct content acquisition cost and the use of finite network bandwidth... Our goal is to provide Cox customers with the best TV experience at the most reasonable price." As for a DirectTV-CSN Houston deal, the satellite provider said it's continuing to work with the Astros and Rockets and that "while the costs of sports networks like this one continue to rise, we remain committed to servicing fans and non-fans alike." Sports media consultant *Chris Bevilacqua* predicts deals will get done eventually. "The LA and Houston RSNs have high quality, proven programming so they will find their distribution, but as these things go, it likely won't happen overnight," he said. "No distributors like new—and un-planned—RSNs as they add more cost into the already shrinking margins of the video business." CSN Houston, a partnership between the Astros, Rockers and **NBC Sports Group**, was set to debut Mon at 5pm CT. After a brief introductory video about the net, daily analysis show "SportsTalk Live" will air with Rockets point guard *Jeremy Lin* and Texans quarterback *Matt Schaub* among the guest. The net's 1st live event is slated for Thurs when its "Thursday High School Football Game of the Week" is introduced. On Sat, it kicks off college football coverage with North TX and Univ of Houston. Beyond Comcast, CSN Houston has deals with a few small ops,

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Look at www.CableFAX.com for more information in the coming weeks.

Please Contact Shannon Nelligan, Senior Marketing Manager,
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including **Coastal Link** (Brazoria, TX), **EnTouch** (Houston area) and **Phonoscope** (Houston area). CSN is encouraging fans to visit IWantCSNHouston.com to “demand” the channel. Day 1 for TWC SportsNet begins at 7pm PT with a 2-hour live special edition of “Access SportsNet” featuring *Kobe Bryant*, *Steve Nash* and *David Beckham* as in-studio guests. It will be followed by the premiere of the net’s weekly behind-the-scenes doc show, “Backstage: Lakers.” TWC Deportes also launches at 7pm, with a 2-hour edition of “Bienvenidos a Time Warner Cable Deportes,” a live special that features Beckham, Bryant and Nash, plus Laker *Pau Gasol* and Galaxy midfielder *Landon Donovan*. At 9pm, the net premieres “Somos Lakers, La Biografía” followed by “Los 16 del Galaxy” at 9:30pm.

OWN Becomes TOWN: Tata Tyler TV. Maybe it was watching his personal friend *Oprah Winfrey*’s struggles with launching a network, but actor-writer-director-producer *Tyler Perry* has abandoned any plan to launch his own cable network (there were talks for a makeover **Lionsgate’s TV Guide Network**). Instead, he’s hooked up with Oprah’s **OWN**, announcing an exclusive partnership that will make the net his singular destination for all new TV series and projects. That includes the net’s 1st foray into scripted series, with 2 from Perry set to premiere in mid-’13. OWN has had its struggles since its Jan ’11 launch, but ratings have been on an upswing with the net poised to close its 3rd consecutive quarter of YOY, double-digit ratings growth across prime and total day among women 25-54.

Speed Game: When it comes to broadband speeds, **Verizon FiOS**, offering an average speed of 29.4 Mbps, topped major cable ops to be the fastest ISP in ’12, according to a report by *PC Magazine*, which was based on data collected from Speedtest.net and ranks ISPs by region. Who’s #2 nationally? A regional ISP that didn’t make the list last year: **Midcontinent**. At 24.7 Mbps, the op’s well ahead of everyone but Verizon, according to the report. **Charter** placed 3rd at 22.2 Mbps. Last year’s top 3, **Cox**, **Comcast** and Charter, still all reside in the top 10. Cox was the only 1 of the 3 to lose ground as it slipped to #9 from #1. Cablevision placed 5th, delivering average speeds of 17.5 Mbps. **Time Warner Cable** and **AT&T U-Verse** didn’t make the top 10 this year.

In the States: CA recently joined other states that have passed bills to restrict state commission’s authority over VoIP. Democratic gov *Jerry Brown* signed SB 1161 into law Fri, preventing any state agency from “enacting, adopting, or enforcing any law...” of VoIP and IP-enabled services. However, VoIP will still be required to contribute to the state’s USF program and provide E-911 access. The state legislature passed the bill in late Aug. Supporters of the bill include **Time Warner Cable**, **Comcast**, **Cisco**, **AT&T** and **Verizon**. Opponents, including **AARP CA** and several consumer groups, claim it doesn’t protect consumers and could cause potential litigation when the **FCC** weighs in. FCC commish *Ajit Pai* praised the passage. “If Golden State Democrats and Republicans can reach a consensus that IP networks should be free from intrusive government regulation, we at the FCC should be able to do so as well,” he said in a statement. Pai was referring to the FCC’s indecision to classify VoIP either as an “information service” or as a “telecommunications service.”

Advertising: Following a **Suddenlink**-requested review of **Frontier**’s DSL ads, the **Natl Advertising Division** recommended the op discontinue performance claims. The claims convey “the unsupported message that Frontier’s ‘dedicated connection’ is superior to cable’s ‘shared’ Internet connection because it provides faster or more reliable service,” the NAD said. NAD, the investigative arm of the ad industry’s self-regulatory system, found no evidence of consumer relevant performance distinctions between shared cable and private DSL services. Frontier disagrees with the NAD ruling and will be appealing the decision, a spokeswoman said.

Ratings: Fresh off its Emmy wins, **Showtime** delivered its largest Sun audience ever with “Homeland” up 60% from its Season 1 premiere (1.73mln viewers at 10pm, 2.07mln for the night). And yes, it sounds like the Best Drama Emmy win did have an impact. The net reports that Homeland is on pace to deliver 1mln VOD views from last week alone. “Dexter” delivered its highest-rated premiere ever with 3.04mln viewers for the night (2.4mln for 9pm timeslot).

Programming: **Disney** star *Ashley Tisdale* is headed to **The Hub** to voice the lead character in upcoming animated series “Sabrina: Secrets of a Teenage Witch” (debuts summer ’13). -- She’s not chasing waterfalls, but she is pursuing TV viewers. *T-Boz* of R&B/hip-hop’s TLC will launch a new reality series on **TLC** as she returns to L.A. and looks to reboot her music career, this time as a single mom and after surviving a brain tumor that forced her to relearn how to walk and talk. -- **Destination America** greenlit 2 series coming this fall/winter: “Buying Alaska” and “Epic.” Premiering Oct 21 at 10pm, “Buying Alaska” features the challenge of purchasing a home that has no basic amenities. From the opposite walk

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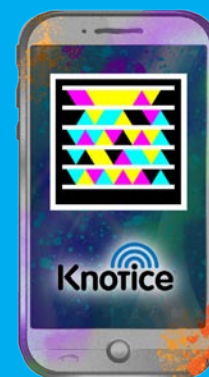


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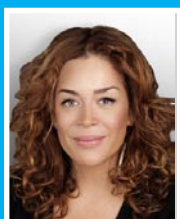
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BUSINESS & FINANCE

of life, "Epic," premiering Dec 16 at 10pm, explores the most excessive and outrageous items in home innovations. -- **Investigation Discovery** will air 2 docs to support the National Domestic Violence Awareness Month. "Telling Amy's Story," which airs Mon from 7—8pm, creates a timeline leading up to the death of *Amy Homan McGee*, who was shot and killed by her abusive husband in '01. "Sin by Silence," which airs Oct 24, first appeared on **Investigation Discovery**. Viewer support helped pass several "Sin By Silence" bills in CA, which helps incarcerated victims of domestic abuse. -- **Current TV** is launching new weekly show dubbed "*John Furgelsang: So That Happened*," starting Fri. The program will be the precursor to the comedian's nightly series, which will premiere later this year.

On the Circuit: **NAMIC's** new exec committee, with **BET Intl & Paramount Channel's Michael Armstrong** serving as chair; **Comcast's Donna Rattley Washington** is vice chair, and **Univision's Jaime Rodriguez** is sec. **Motorola's Mark Depietro** will serve as treas and **NAMIC** current board chair **Raymond Gutierrez** of **CBS** becomes immediate past chair. Newly elected board members include: **Time Warner Cable's Jennifer Chun**, **Fox Networks' Michael Cooper**, **ESPN's Oliver Dizon**, **Turner's Noni Ellison Southall**, **TWC's Janet Parker**, **Suddenlink's Kevin Stephens**, **AETN's Michelle Strong** and **The Africa Channel's Mark Walton**.

CableFAX Daily Stockwatch

Company	10/01 Close	1-Day Ch	Company	10/01 Close	1-Day Ch
BROADCASTERS/DBS/MMDs					
DIRECTV:	52.03	(0.41)	CONVERGYS:	15.56	(0.11)
DISH:	30.29	(0.32)	CSG SYSTEMS:	22.70	0.21
DISNEY:	52.07	(0.21)	ECHOSTAR:	28.66	UNCH
GE:	22.81	0.10	GOOGLE:	761.78	7.28
NEWS CORP:	24.84	0.05	HARMONIC:	4.49	(0.05)
MSOS					
CABLEVISION:	15.79	(0.06)	INTEL:	22.75	0.10
CHARTER:	75.01	(0.05)	JDSU:	11.92	(0.46)
COMCAST:	35.38	(0.2)	LEVEL 3:	22.64	(0.33)
COMCAST SPCL:	34.44	(0.21)	MICROSOFT:	29.49	(0.27)
GCI:	10.13	0.33	RENTRAK:	16.83	(0.1)
LIBERTY GLOBAL:	61.14	0.39	SEACHANGE:	7.84	(0.01)
LIBERTY INT:	18.48	(0.02)	SONY:	11.84	0.14
SHAW COMM:	20.66	0.16	SPRINT NEXTEL:	5.18	(0.34)
TIME WARNER CABLE:	95.71	0.65	TIVO:	10.45	0.02
VIRGIN MEDIA:	29.80	0.38	UNIVERSAL ELEC:	18.20	0.62
WASH POST:	364.39	1.36	VONAGE:	2.28	UNCH
PROGRAMMING					
AMC NETWORKS:	43.32	(0.2)	YAHOO:	15.82	(0.15)
CBS:	35.52	(0.81)	TELCOS		
CROWN:	1.68	0.01	AT&T:	37.75	0.05
DISCOVERY:	59.95	0.35	VERIZON:	45.81	0.24
GRUPO TELEVISIA:	23.78	0.27	MARKET INDICES		
HSN:	49.08	0.03	DOW:	13515.11	77.98
INTERACTIVE CORP:	52.59	0.53	NASDAQ:	3113.53	(2.7)
LIONSGATE:	14.96	(0.31)	S&P 500:	1444.49	3.82
LODGENET:	0.62	(0.02)	TECHNOLOGY		
NEW FRONTIER:	1.26	(0.07)	ADVANTAGE:	2.10	(0.1)
OUTDOOR:	7.34	0.06	ALCATEL LUCENT:	1.05	(0.05)
SCRIPPS INT:	62.54	1.31	AMDOCS:	32.65	(0.34)
TIME WARNER:	45.50	0.17	AMPHENOL:	57.77	(1.11)
VALUEVISION:	2.31	(0.04)	AOL:	35.38	0.15
VIACOM:	54.38	(0.02)	APPLE:	659.39	(7.71)
WWE:	8.01	(0.04)	ARRIS GROUP:	12.76	(0.03)
MARKET INDICES					
			AVID TECH:	9.54	0.08
			BROADCOM:	34.10	(0.47)
			CISCO:	19.04	(0.06)
			CLEARWIRE:	1.34	UNCH
			CONCURRENT:	4.64	0.15



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