

# CableFAX Daily™

Wednesday — October 24, 2012

What the Industry Reads First

Volume 23 / No. 206

## Fox First: Fox Gets Win, Cybersecurity Makes Brief Appearance in Final Debate

It's a good time to be **Fox News**. Always a ratings powerhouse, the presidential debates have been especially beneficial for the net. Fox beat out its cable news competitors with Mon's final debate, just as it did with the 2 others (and the veep debate). In fact, the 11.5mln viewers early **Nielsen** estimates indicate for Mon make it the highest-rated telecast in the net's 16-year history. Another feather in Fox's cap: it was the #1 cable net in prime last week with a 2.8 HH rating. It had the 2nd most-watched program of the week with its coverage of the Tues presidential debate (11.1mln), with only MNF on **ESPN** ranking higher (12.8mln). Of last week's top 15 cable programs, Fox News was home to 5 of them, with eps of "On the Record with *Greta VanSusteren*," "Hannity" and "The O'Reilly Factor" all scoring high. How did the rest of the gang do? **CNN** notched 5.8mln total viewers for Mon's debate and tied for 17th in prime last week (0.9 HH rating). CNN's bragging points include for Mon's debate include +1205% growth among total viewers for its prior 4 non-event Mon averages and +1748% for 25-54s. **MSNBC** had 4.1mln total viewers for the final debate but notched a 6th place finish for last week (1.3 HH rating). **Rentrak** offered up a few interesting tidbits from its analysis of the 3rd presidential debate: the audience didn't stay tuned in as long compared to the other debates. The avg time spent viewing fell to 67.7% of mins compared to 75.7% during the 2nd and 73% for the 1st. **TiVo Research and Analytics** provided its regular summary of the most-watched moment, calling it for Obama's description of changes in the structure of the US military (the "Battleship" quote). No Romney remarks appeared in TiVo's top 5 most-watched moments of the debate. During the final presidential debate Mon night, cybersecurity got a brief mention from both candidates. "When it comes to our military, what we have to think about is not, you think just budgets, we've got to think about capabilities. We need to be thinking about cybersecurity. We need to be talking about space. That's exactly what our budget does, but it's driven by strategy. It's not driven by politics," Obama said, fielding a question from moderator *Bob Schieffer*, **CBS** anchor, on how the military's strength will be maintained with budget cuts in defense spending. Romney's cybersecurity comments came in the context of hacking. When Schieffer asked about "the rise of China and future challenges for America," Romney said, "They're stealing our intellectual property, our patents, our designs, our technology, hacking into our computers, counterfeiting our goods." The Obama Administration has pushed the Congress to pass the comprehensive Cybersecurity Act. After the bill was blocked by Senate Republicans, the White House started drafting an executive order to save the bill. Meanwhile, the cybersecurity legislation could potentially come back next month. In a recent statement, Senate Majority Leader *Harry Reid* (D-NV) said he plans to bring the bill to the floor when Congress returns in Nov. Reid made the statement after a speech by Defense Secretary *Leon Panetta* warning of the urgent need to prepare for threats to infrastructure from cyberspace-based attacks.

**On the Hill:** House Majority Leader *Eric Cantor* (R-VA) slammed the **FCC's** net neutrality rules in a report dubbed "The Imperial Presidency" Tues. Businesses negatively impacted by these new regulations have been forced to go to court to defend against regulations that the agency has no authority to issue, the report said.



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**U-Verse Growing?** According to **Jefferies** analyst **George Notter**, **AT&T** is looking to expand its **U-Verse** footprint, potentially benefiting equipment maker **Alcatel-Lucent**. The expansion could mean AT&T buying some \$110-190mln of equipment, Notter said in a report. In the next 12-18 months, some 3-5mln access lines of the total 18mln lines that don't currently receive U-Verse are expected to be upgraded to receive the service, the report said.

**Deals:** **RFD-TV** and **Rural TV** parent **Rural Media** bought **FamilyNet** (14.8mln homes) from **Interactive Television and Gaming Nets** (formerly **Comstar Media**). The program schedules of Rural TV and FamilyNet will be merged into 1 net on Jan 1, which will bring Rural's rural-themed content for the 1st time to major cities, including NY, Atlanta, Philly and L.A.

**Online:** **Time Warner Cable** is putting all social media feeds in 1 place with the launch of Social One, which aggregates feeds from **Facebook**, **Twitter**, **YouTube**, **LinkedIn** and other social networks, the op said in a blog post Mon. It's available for TWC subs as a desktop app or **Firefox** browser add-on.

**Beta:** **Fox Movie Channel/FX Movie Channel** and **Lifetime Movie Channel** ranked as the favorite digital basic nets in **Beta Research's** June survey of some 2080 digital cable subs from 32 cable systems. The study measured more than 40 digital basic services. 24% of those surveyed ranked Fox Movie/FX Movie and Lifetime Movie as a favorite channel. Among digital basic nets, **NFL Net** had the highest perceived value at \$1.87 vs **Tennis** \$1.61 and **MTV Jams** \$1.58. ID scored the highest in viewer satisfaction (57%), followed by **Weatherscan** (54%). **H2**, **Nat Geo Wild** and **NFL Net** all scored 53%.

**Ratings:** **AMC's** "Walking Dead" had a spectacular 2nd ep, scoring 9.5mln total viewers Sun night, besting **NFL Net's** Thurs night game (7mln viewers). Game 3 of the **ALCS** on **TBS** was the 6th most-watched program of the week (6.2mln), followed by **CNN's** Tues debate coverage (5.8mln) and after show (5.5mln). -- The season finale of **Discovery's** "Yukon Men" and a "Gold Rush" special helped the net dominate this past Fri. The 2 were the top 2 cable programs (excluding sports) for persons and men 25-54 and men 18-49. "Yukon Men" earned a 1.46 HH rating and averaged 2.15mln viewers P2+ while "Gold Rush" special earned a 1.08 HH and averaged 1.5mln viewers P2+. -- Two **Nickelodeon** series scored solid ratings this week. "SpongeBob SquarePants" topped all TV with kids 2-11 and "Teenage Mutant Ninja Turtles" won its time period by double digits among K 2-11 across all TV.

**Programming:** **MTV** airs "Ask Obama Live: An MTV Interview with the President" Fri at 5pm. Viewers can submit questions via **Facebook**. It will be roadblocked across **MTV2**, **mtvU**, **MTV Hits**, **MTV Jams** and on MTV.com and MTV's mobile platform. MTV said it has invited **Mitt Romney** to participate in a live, 30-min special as well, and hopes to also conduct a sit down interview with him in advance of Election Day. -- **BBC** and **Science** are co-producing a factual drama starring **William Hurt**. Hurt will play **Richard Feynman**, who was instrumental in uncovering the truth behind the space shuttle Challenger disaster of '86. The program will be televised next year. -- With the elections approaching, **Discovery en Espanol** is launching a range of programs focusing on key issues of concern to Hispanics, including 2 original docs. "Caras del odio," which examines hate crimes against Hispanics," debuts Oct 28 at 9pm, and "Desamparados," a look at Hispanic families struggling to survive in difficult economic circumstances, airs Nov 4, 9pm.

**Intl:** **Time Warner Cable NY and NJ** launched Russian channels **Dom Kino**, **Vremy** and **Muzika Pervogo**, produced by **Channel One Russia Worldwide**. They are part of the new Russian Pass Max package. TWC is offering a free preview

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# BUSINESS & FINANCE

Nov 12-18 to digital subs.

**People:** Nielsen evp Howard Shimmel was named svp, ad sales & sports research for Turner, reporting to research chief Jack Wakshlag. -- **Adaptive Spirit**, the non-profit trade assoc that oversees **SkiTAM**, has added 4 directors to its board: **Bright House's Nomi Bergman**, **Time Warner Cable's Mike Hayashi**, **Huawei's Ron Pitcock**, **Charter's Jay Rolls**. Also joining the board as legal liaison is **Launch Pad Media Advisors** pres Ken Tolle.

**Business & Finance:** Comcast Ventures, the investment arm of Comcast and Rogers Venture Partners, are investing \$15mln in video conferencing firm **Tely Labs** to target the SMB market. Tely Labs will offer its new telyHD Business Edition, a service allowing HD multi-party video calling, desktop sharing and document collaboration. Priced at \$499, the service includes the 1st year's subscription of multi-party video calling. Annual subscriptions for the 2nd year onwards are \$199 a year.

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**Other open positions:** Affiliate Marketing Manager, Digital Affiliate Marketing Manager, Marketing Coordinator

## CableFAX Daily Stockwatch

Company	10/23 Close	1-Day Ch	Company	10/23 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
DIRECTV:	51.11	(0.22)	CONVERGYS:	16.01	UNCH
DISH:	36.00	(0.63)	CSG SYSTEMS:	21.41	(0.12)
DISNEY:	50.76	(1.03)	ECHOSTAR:	31.51	0.38
GE:	21.28	(0.42)	GOOGLE:	680.35	1.68
NEWS CORP:	24.58	(0.61)	HARMONIC:	4.27	(0.04)
<b>MSOS</b>					
CABLEVISION:	18.09	(0.36)	INTEL:	21.59	0.13
CHARTER:	76.19	(1.98)	JDSU:	10.42	0.19
COMCAST:	36.43	(0.6)	LEVEL 3:	22.24	(0.07)
COMCAST SPCL:	35.55	(0.59)	MICROSOFT:	28.05	0.05
GCI:	8.83	(0.18)	RENTRAK:	16.77	(0.1)
LIBERTY GLOBAL:	61.18	(0.87)	SEACHANGE:	8.74	0.22
LIBERTY INT:	20.27	0.02	SONY:	12.09	(0.26)
SHAW COMM:	20.56	(0.24)	SPRINT NEXTEL:	5.65	(0.03)
TIME WARNER CABLE:	97.70	(1.59)	TIVO:	9.91	0.10
VIRGIN MEDIA:	34.13	1.26	UNIVERSAL ELEC:	16.93	0.23
WASH POST:	337.42	(4.9)	VONAGE:	2.17	UNCH
<b>PROGRAMMING</b>					
AMC NETWORKS:	45.95	(1.35)	YAHOO:	16.67	0.90
CBS:	33.28	(0.65)	<b>TELCOS</b>		
CROWN:	1.69	0.02	AT&T:	35.00	(0.26)
DISCOVERY:	59.50	(1.25)	VERIZON:	44.07	(0.7)
GRUPO TELEVISIA:	23.24	(0.16)	<b>MARKET INDICES</b>		
HSN:	48.32	(0.56)	DOW:	13102.53	(243.36)
INTERACTIVE CORP:	52.41	(1.11)	NASDAQ:	2990.46	(26.5)
LIONSGATE:	16.13	0.03	S&P 500:	1413.11	(20.71)
LODGENET:	0.42	0.04	<b>TECHNOLOGY</b>		
NEW FRONTIER:	1.99	(0.01)	ADVANTAGE:	2.05	(0.01)
OUTDOOR:	7.14	(0.15)	ALCATEL LUCENT:	1.07	(0.02)
SCRIPPS INT:	62.35	(1.37)	AMDOCS:	33.06	0.26
TIME WARNER:	44.02	(0.97)	AMPHENOL:	61.00	(0.56)
VALUEVISION:	2.18	(0.08)	AOL:	35.50	(0.28)
VIACOM:	54.07	(1.62)	APPLE:	613.36	(20.67)
WWE:	8.11	(0.02)	ARRIS GROUP:	12.97	0.06
<b>MARKET INDICES</b>					
DOW: 13102.53 ... (243.36)					
NASDAQ: 2990.46 ... (26.5)					
S&P 500: 1413.11 ... (20.71)					
<b>TECHNOLOGY</b>					
ADDVANTAGE: 2.05 ... (0.01)					
ALCATEL LUCENT: 1.07 ... (0.02)					
AMDOCS: 33.06 ... 0.26					
AMPHENOL: 61.00 ... (0.56)					
AOL: 35.50 ... (0.28)					
APPLE: 613.36 ... (20.67)					
ARRIS GROUP: 12.97 ... 0.06					
AVID TECH: 6.59 ... (0.1)					
BROADCOM: 33.36 ... (0.06)					
CISCO: 18.01 ... (0.18)					
CLEARWIRE: 1.91 ... (0.03)					
CONCURRENT: 5.06 ... (0.14)					

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**OTT Musings: Stakeholders Debate Evolving Content Delivery at CES**  
 With the Comcast/Disney distribution deal a harbinger for TV Everywhere and Fox's move last summer to put select content behind a pay wall, panelists mulled the ins and outs of over-the-top delivery at an OTT panel at CES. "The tablet, the device, is going to control the TV experience at U-verse," said Jeff Weber, AT&T VP, product and strategy, noting the company's drive into tablet apps and model of providing APIs for developers to send content from device to television. But discernment is critical, panelists agreed. While AT&T has an approval process in place, YouTube abandoned its API-based partnership model two years ago "because we ended up with different apps on diff TV, and performance differed," said Francisco Valera, dir/global head of platform and games partnerships. Touting YouTube's deals with Samsung, LG and its new Xbox partnership, "if we can't control the app, and update features quickly, it's a lost cause," he said. YouTube's recent-day model of investment in original content will stretch the company's presence in specific categories such as "niche cooking and unique travel" channels. "We don't see ourselves becoming a large studio, but we're more than dogs on skateboards," Valera quipped. "We want to bring in proven providers of broadcast quality content that's not sustainable in the cable universe." Valera said YouTube is working on its fourth UI, and moving toward the HTML 5 standard. Noting that unlike other video distributors YouTube always owns its TV and mobile content rights, "Can we bring our content to an AT&T, Cox or Comcast? We can, and that's where we are excited," he said. Initial deals with distributors are rolling out in Europe and Asia, he said. At Cox, focus remains on the UI. "It's important to get the user interface right, especially as more content is added in," said Lisa Pickelsimer, executive director, video product development. Integrated search, recommendations and social media will become more key, Pickelsimer said, noting the bigger role of metadata and the need