

# CableFAX Daily™

Wednesday — November 10, 2010

What the Industry Reads First

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## Red Alert: 'Conan' Premiere Delivers for TBS

All the late-night TV big dogs bowed Mon night to alpha male *Conan O'Brien*. Following a highly-publicized falling out with **NBC**, the comedian made his cable debut on **TBS**' "Conan" (11pm ET) and drew 4.16mln total viewers, 2.45mln 18-34s and 3.29mln 18-49s while the audience's median age of 30 fit snugly with the TBS brand. And as "Conan" earned a 2.8 rating in metered markets, according to **Nielsen**, *Jay Leno* scored a 2.7, *David Letterman* a 2.5 and **Comedy Central's** "The Daily Show with Jon Stewart" and "The Colbert Report" a respective 1.5 and 1.1. "Conan's audience has been very vocal online, and he clearly made a smooth transition from **Twitter** to TBS," said **Turner Ent Networks** pres *Steve Koonin* in a release, noting the show's "extraordinary audience. "Conan" even bolstered subsequent feature "Lopez Tonight," which delivered 883K 18-49s and 571K 18-34s in its new time slot, well ahead of its respective YTD averages of 532K and 302K. But 1 night does not TV success make, so scrutiny of "Conan" audience levels over the next few days and weeks will surely follow. Near term, the flood of initial reviews across media may impact the show's viewership. *Ad Age* recommended the comedian stop bashing cable (plenty of cable jokes were on display for ep 1, including that TBS offered him "much less" money), with the trade pub noting that many viewers no longer make a distinction between broadcast and cable. It has a point. Comedy Central laughed all the way to the bank when "The Daily Show" outperformed Leno and Letterman last month. For the most part, the show felt like O'Brien's old show—though it was quite clear there had been a change in venue given the number of dirty words dropped by first guest *Seth Rogen*. Critics were generally happy with the return of the familiar, save the *Washington Post*, which complained it was too much like his old show. Irrespective of future "Conan" averages, the show has already delivered handsomely by becoming the 1st Turner program to gain ad rate parity with broadcasters. Also, it will likely add plenty of muscle to what appears to be Turner's firm grip on late-night cable TV and its younger-dominated audience. Besides TBS' fresh comedic talk show block during the week, **Adult Swim**, coming off a stellar summer, has established itself as a major total programming day player through post-prime success. During 3Q, Adult ranked 6th among all cable nets in total day with a 1.0/986K, according to **Nielsen**, and per Turner data achieved YOY gains during the period among total viewers (+2%), 18-34s (+7%), 18-49s (+7%) and even 25-54s (+1%). Turner also said the net was tops in total day delivery among 18-34s and 18-49s.

## CableFAX Webinar

### Turning a Cable Crisis into Opportunity

Tuesday, November 16, 2010

1:30 – 3:00 pm (ET)

Register Today at  
[www.cablefax.com/webinars](http://www.cablefax.com/webinars)

Today's communications pro must be ready to defend reputations and set the record straight at a moment's notice. In this Webinar, you'll learn crisis management techniques, hear case studies and become better at avoiding disaster.

You will learn:

- How consumer perceptions are formed, and what arguments and actions resonate with them.
- How to immediately address bad press or viral noise without coming off as defensive.
- How to avoid crises escalating to unmanageable levels.
- How to speak directly to your customers or audience without relying on the media filter or letting others define your position.

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# CableFAX

*Celebration of Leadership*

**100**  
**CableFAX**

December 9, 2010  
Luncheon  
12:00 – 2:30pm  
Grand Hyatt, NYC

Join us for the CableFAX 100 Luncheon, as we salute the cable leaders, pioneers, influencers, out of the box thinkers and rainmakers. This must-attend industry event showcases the “who’s who” of the cable business and will honor the CableFAX 100 and The Regional Top Players.

**CableFAX's**  
Most Powerful Women  
in Cable

December 10, 2010  
Breakfast  
8:00 – 10:30am  
Grand Hyatt, NYC

Join us for CableFAX's Most Powerful Women in Cable Breakfast, as we salute the women who have made their mark on the industry with leadership, innovation and community. We will also be recognizing the Top Women in Cable Tech and the Top 10 Places to Work in Cable.

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**Unbundle Us Not:** MVPDs are teaming up to take their concerns about the FCC's AllVid inquiry to the FCC. Reps from **ACA, AT&T, Cablevision, Charter, Comcast, Cox, DirecTV, NCTA, Time Warner Cable** and **Verizon** were at the Commission Mon meeting with Media Bureau chief *William Lake*. While the MVPDs said they share the FCC's overall AllVid objective of allowing consumers to obtain devices at retail that could be used to access multichannel programming, they expressed concern about some proposals suggesting the FCC adopt a forced unbundling of MVPD video offerings. "In our meeting with the Bureau we emphasized that such an approach is fraught with legal, technical, business and practical problems and that, rather than 'preserv[ing] the integrity of the pay stream' and the innovation around it, such an approach would undermine that integrity and innovation," NCTA said in a filing about the meeting. The MVPDs are pointing to proposals made by **CEA, Public Knowledge, Google** and **Sony**. The 4 were at the FCC this month urging it to act expeditiously on AllVid so consumers "may soon realize the benefits of a competitive marketplace for video devices."

**In the Courts:** **Stifel Nicolaus** thinks **DISH** has a chance at some relief following Tues' oral arguments in its never-ending patent case with **TiVo**. The firm believes TiVo risks either having the contempt order reversed or having the case sent back to the district court with instructions to reconsider the contempt order in light of clarifications to the standard that governs contempt actions. "We believe that EchoStar may have at least 3 and perhaps 4 of the 5 votes it will need for some form of relief," Stifel said in a note to clients. "As has been true for a long time now, we are skeptical that the parties will settle before the court issues its opinion, which we see as most likely coming in 1Q 2011."

**In the States:** A **Parents Television Council** survey of fall broadcast programming found that there was 70% more profanity in prime today than 5 years ago—and that's just on the major broadcast nets. -- By agreeing to participate in **Verizon Wireless'** LTE in Rural America program, **Bluegrass Cellular** will construct and operate a 4G LTE network in central KY using spectrum leased from VZ, and its customers gain access to VZ's 4G LTE network throughout the US.

**Over-the-Airheads:** **Sinclair's** country music channel **The Country Network** went live in 12 additional markets, including Buffalo, Las Vegas and OK City. It's now carried on multicast in 22 markets, with 6 more locales expected shortly. Pursuant to its retrans pact, Sinclair said it expects to have TCN carried by the majority of cable systems in the germane markets within 90 days.

**Research:** 56% of US homes may own an HDTV but more than 80% of TV viewing is of standard-def content, according to **Nielsen**, which said just 13% of total day viewing on cable and 19% on broadcast is "true HD" viewing. **[Go to CableFAXDaily.com for more subscriber-exclusive info].**

**Ratings:** The midterm elections became an ideal tonic for **Fox News**, an advantageous blend of important races and expected GOP resurgence that snapped the net out of a relative ratings malaise. Notching 7 of the week's top 10 telecasts—3 consecutive 1-hour blocks on election night ranked directly behind **ESPN's** MNF at the top while averaging a 5.03/4.97mIn—Fox News ranked 2nd among nets in prime with a 2.3/2.30mIn. Compare those numbers to the net's prime delivery during the previous week (1.8/1.77mIn), Oct (1.7/1.71mIn) and 3Q (1.5/1.54mIn). And the best competitors **CNN** and **MSNBC** could muster on election night were respective 10-11pm blocks that delivered 1.9/1.89mIn and 1.6/1.57mIn. ESPN led the week with a 2.6/2.58mIn, and **USA** (2.2/2.19mIn), **Disney** (1.9/1.91mIn) and **TNT** (1.4/1.40mIn) completed the top 5. -- **Brag Book:** Spurred by 11 telecasts that drew more than 1mIn viewers including "Millionaire Matchmaker" and "Top Chef Just Desserts," **Bravo** scored its best week ever from Nov 1-7 through prime averages of more than 1mIn total viewers and 697K 18-49s. -- **Hallmark** original movie "A Family Thanksgiving" scored a 2.0 HH rating and 3.4mIn viewers to become the top-rated movie on ad-supported cable Sat and during the week of Nov 1.

**Programming:** Meant to illustrate the net's "Always On. Slightly Off" brand, **IFC's** dev slate of 8 new originals includes: "Whisker Wars," spotlighting the world of competitive facial hair growing, "Cartoon Show," offering an animated look at a large cast of iconic cartoon characters as they struggle to produce a daily variety TV show, and "Greg & Donny," a scripted comedy about 2 lifelong friends who grew up and live in a small town in western PA. -- **Sundance** picked up the basic cable rights to **HBO** series "The Comeback." The *Lisa Kudrow* starrer will premiere Nov 23. -- **Karmaloop TV** forged its 1st licensing deal, with Hong Kong-based **Celestial Pictures** for a number of kung fu and action movies.

**People:** *David Janollari* was upped to evp, head of programming for **MTV**. *Chris Linn* was named evp, programming and head of MTV Production. -- Former **Time Warner** chmn/CEO *Gerry Levin* is back in cable, joining **Oasis TV** as sr adviser.

# BUSINESS & FINANCE

He'll become chmn upon the closing of the body-mind-spirit VOD network's series A-1 funding. Levin has some experience in that area to as he's presiding dir of holistic mental health institute **Moonview Sanctuary**. Oasis is available on demand in 9.9mln HHs. It's planning a linear channel launch in Q2. -- *Val Borelan* was elevated to svp, programming, promotion and multi-platform strategy at **Comedy Central**. -- **CTAM** hired former **Cox** exec **Mark Snow** as vp, gm, overseeing direct marketing for the organization's Cable Mover initiative. He joined the org from full-service ad agency **SWIRE**.

**On the Circuit:** **NAMIC** kicked off a membership drive, with each new member joining between now and Dec 3 entered to win a trip to HI for the Pro Bowl. **Motorola Mobility** is providing the prize. Current **NAMIC** members renewing their memberships also will be entered, and members can get entries for recruits.

**Editor's Note:** In case you haven't heard, **CableFAX** now has a **Facebook** fanpage. Join us at <http://tinyurl.com/2fmtmed>.

**Business/Finance:** Including the previously announced \$20mln+ non-cash write-down primarily related to TV programming inventory, **Playboy's** results included income of \$800K at its Ent Group, compared \$2.3mln a year ago. Domestic TV rev dropped 21% to \$9.8mln as **DirectTV** withheld \$3mln in estimated payments, and movie and VOD rev showed modest declines.

## CableFAX Daily Stockwatch

Company	11/09 Close	1-Day Ch	Company	11/09 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
DIRECTV:	42.50	(0.33)	ARRIS GROUP:	10.12	UNCH
DISH:	19.91	(0.14)	AVID TECH:	13.26	(0.08)
DISNEY:	36.86	(0.2)	BIGBAND:	3.07	(0.12)
GE:	16.62	(0.09)	BLNDER TONGUE:	2.17	UNCH
NEWS CORP:	16.08	(0.13)	BROADCOM:	42.06	(0.42)
<b>MSOS</b>					
CABLEVISION:	29.33	0.01	CISCO:	24.35	(0.04)
CHARTER:	35.80	0.01	CLEARWIRE:	6.30	(0.23)
COMCAST:	20.77	(0.14)	COMMSCOPE:	32.07	(0.1)
COMCAST SPCL:	19.58	(0.13)	CONCURRENT:	4.70	UNCH
GCI:	10.50	(0.29)	CONVERGYS:	12.65	0.82
KNOWLOGY:	14.26	(0.03)	CSG SYSTEMS:	20.00	(0.17)
LIBERTY CAPITAL:	59.37	(0.58)	ECHOSTAR:	21.66	(0.04)
LIBERTY GLOBAL:	38.33	(0.58)	GOOGLE:	624.82	(1.95)
LIBERTY INT:	15.34	(0.05)	HARMONIC:	6.68	(0.06)
MEDIACOM:	6.89	(0.06)	INTEL:	21.16	(0.07)
SHAW COMM:	21.39	(0.07)	JDSU:	11.60	(0.36)
TIME WARNER CABLE:	61.91	(0.14)	LEVEL 3:	1.05	0.17
VIRGIN MEDIA:	26.00	(0.18)	MICROSOFT:	26.95	0.14
WASH POST:	390.57	(8.69)	MOTOROLA:	8.21	0.06
<b>PROGRAMMING</b>					
CBS:	16.36	(0.46)	RENTRAK:	27.39	0.02
CROWN:	2.68	(0.06)	SEACHANGE:	8.09	(0.1)
DISCOVERY:	40.53	(0.44)	SONY:	33.31	(0.36)
GRUPO TELEVISA:	23.13	(0.27)	SPRINT NEXTEL:	4.03	0.03
HSN:	26.92	0.15	THOMAS & BETTS:	44.83	(0.68)
INTERACTIVE CORP:	28.30	(0.37)	TIVO:	9.60	(1.69)
LIBERTY:	39.27	(0.6)	UNIVERSAL ELEC:	25.88	(1.09)
LIBERTY STARZ:	62.93	(0.7)	VONAGE:	2.46	0.02
LIONSGATE:	7.23	(0.06)	YAHOO:	16.97	0.53
LODGENET:	2.85	(0.26)	<b>TELCOS</b>		
NEW FRONTIER:	1.90	(0.02)	AT&T:	29.18	UNCH
OUTDOOR:	6.03	(0.09)	QWEST:	6.79	(0.01)
PLAYBOY:	5.03	0.12	VERIZON:	33.01	(0.16)
SCRIPPS INT:	51.93	(0.44)	<b>MARKET INDICES</b>		
TIME WARNER:	31.82	0.30	DOW:	11346.75	(60.09)
VALUEVISION:	2.56	0.20	NASDAQ:	2562.98	(17.07)
VIACOM:	43.25	(0.49)	S&P 500:	1213.40	(9.85)
WWE:	13.79	(0.22)	<b>TECHNOLOGY</b>		
<b>TECHNOLOGY</b>					
ADC:	12.67	UNCH	ADDVANTAGE:	3.22	(0.08)
ALCATEL LUCENT:	3.09	(0.11)	ALCATEL LUCENT:	3.09	(0.11)
AMDOCS:	26.69	(0.28)	AMDOCS:	26.69	(0.28)
AMPHENOL:	52.17	(0.31)	AMPHENOL:	52.17	(0.31)
AOL:	26.29	0.19	AOL:	26.29	0.19
APPLE:	316.08	(2.54)	APPLE:	316.08	(2.54)

## CableFAX Workshop

### Taking Social Media to the Next Level

CableFAX's one-day workshop will focus on how to leverage the newest and most promising social media platforms for your cable promotions. The goal is to get you up to speed on many of the exciting new platforms that are below the radar now - but not for long. They will help you promote your program, your content, your brand and your business.

Questions: Elizabeth Brown at [ebrown@accessintel.com](mailto:ebrown@accessintel.com) or 301-354-1610.

Register Today! [www.cablefax.com/dec8](http://www.cablefax.com/dec8)

December 8, 2010 8:45am-4:00pm NYC

