

CableFAX Daily™

Monday — November 28, 2011

What the Industry Reads First

Volume 22 / No. 228

Sports Talk: Univision Gears Up for Sports Net Launch

With Univision Deportes set to launch next year, we recently chatted up Univision Sports pres Alexander "Sandy" Brown about launch preparations. The 24/7 sports net is part of a trio of new nets launching, with news and novellas also getting their own channels. With other Spanish speaking sports channels, such as ESPN Deportes and Fox Deportes, already available, how do you plan to stay relevant after starting later? Univision has built a 50-year relationship with Hispanics—we have successfully built our reputation as a leader in sports programming for decades. Sports are nothing new for us. Our viewers rely on the Univision brand for the culturally relevant sports content they seek. In fact, I would say that we're launching the network because we have an audience looking for a network; we are not a network looking for an audience. We also have an incredible content partner in Televisa. What kind of market will there be for English speakers? Univision's strongest demographic performance is among 18- to 34-year-olds, and certainly, a growing number of this segment is bilingual. According to the Nielsen ratings, they are choosing to seek out and watch Univision: 42 out of the top 50 shows among Hispanic bilingual audiences are on Univision. The key to winning with this young and thriving bilingual consumer is cultural relevancy. Today second- and third-generation Hispanics maintain strong cultural ties and celebrate Hispanic traditions. How are carriage talks going? Our distribution team is working diligently to negotiate distribution partners for the network, which will be carried independently from the other networks we are launching: t!Novelas and Univision News. Soccer has obviously been the most popular sports content for this market, but what other sports do you expect to hit it off? The network will broadcast some of the leading soccer tournaments and matches from around the world, including the FIFA World Cup 2014 in Brazil and the qualifiers starting in June, MLS, the U.S. Men's National Team, the Mexican National team, all of the home games for 12 of the 18 teams in the Mexican League... and more. Univision Deportes will also feature a sports round-up show [that] will report on all sports from baseball, to football, to boxing, wrestling and basketball, and more. How have you incorporated social networking as part of launching the channel? We've built a strong tradition of bringing all the excitement and passion of soccer to our viewers, no matter the platform. We will continue to utilize our Facebook and Twitter accounts, @UnivisionFutbol and @UnivisionSports, to engage our viewers and create buzz on our launch.

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Retrans Ruckus: December's almost here and with it comes an increase in retrans spats. **Sinclair** already sounded the alarm on **Insight (Cfax, 11/22)**. Now, **BWTelcom**, which serves southwest NE, is warning it could lose **ABC, NBC** and **CBS** affils if a deal can't be reached by Dec 31. The stations involved include **KWNB**, operated by **Pappas Telecasting**, and **KSN**, owned by **New Vision**. "BWTelcom will not bow to the demands of off-air broadcasters because we put the needs of customers first," GM **Randall Raile** told the *Wauena Breeze*.

Inside the Beltway: House Intelligence committee chmn **Mike Rogers** (R-MI) on Wed will discuss bipartisan cyber-threat legislation that he will introduce. The event at **NCTA** is sponsored by the cable group as well as **US Telecom** and **CTIA**. The legislation will promote sharing threat intelligence by the govt with the private sector—something NCTA chief **Michael Powell** has been calling for (**Cfax, 11/16**). -- Also coming down the pike is House Communications subcmte chmn **Greg Walden's** (R-OR) spectrum bill, slated for a mark-up Thurs. Dubbed the Jumpstarting Opportunity with Broadband Spectrum (JOBS) Act, it would compensate broadcasters for giving up spectrum and establish an interoperable public safety network.

Step Up: **Comcast** changed **Michael Angelakis'** title to vice chmn, CFO from evp, CFO and secured his employment through June, '16, according to an **SEC** filing. The agreement does not provide for any increase in base salary or annual cash bonus opportunity, but he receives signing bonuses totaling \$4.25mIn on or after Jan 1. Comcast's board amended the bylaws to authorize an officer-level vice chmn who is also not a director. Comcast hasn't replaced **Tyco's Ed Breen**, who resigned from the board earlier this month (**Cfax, 11/8**). "We have 11 directors on our board and are comfortable with the size of it," a spokesperson said.

Online: **YouTube** began rolling out the first of hundreds of movies from **Walt Disney Studios** available to rent at YouTube.com/movies. Prices start at \$1.99, with users given 30 days to start watching a flick and 48 hours to watch it once they start it. Disney is the 4th big studio partner, following **Sony, Universal** and **Warner Brothers**.

In the States: *DavidsonNews.net* reports that former **Time Warner Cable** exec **David Auger** was named as the 1st local CEO of **MI-Connection Communication System**, the Mecklenburg County, NC, muni that the towns of Mooresville and Davidson bought from TWC in '07. His appointment comes as the towns prepare to take over day-to-day operations of the system from **Bristol Virginia Utilities**, the Website said, noting that MI-Connection is now an **NCTC** member.

Ratings: **CNN** said its GOP National Security debate Tues notched 3.599mIn total viewers and 1.04mIn 25-54s. CNN's "AC 360" benefited at 10pm, by ranking 1st among the cable news nets with 1.427mIn total viewers.

Advertising: According to the **Advanced Advertising Media Project**, a research initiative spearheaded by the **4A's** and **BlackArrow**, customers don't mind VOD advertising and are nearly indifferent to the size of the ad load. Between 31% and 38% of participants across all ad loads (3min per 30min, 5.5min per and 8min per) rated the viewing experience as "excellent," and from 65-75% as "excellent" or "very good"—compared to the respective totals of 29% and 66% for linear TV. The study, which included 11 broadcast and cable nets and branded messaging from 10 national advertisers across 6 categories, also revealed that on demand TV positively affects consumers' sense of control over content and ads, and offers important opportunities for increased ad durations.

Programming: **Cox Sports**, a regional channel covering RI and CT, will debut original doc "Providence College: Black and White," Dec 1, 9:30pm on VOD and Cox channel 3. The film details the relationship between the civil rights movement in America and college basketball in Providence.

On the Circuit: It's baaack. **Comcast** was slated to light up its "Holiday Spectacular" on Thanksgiving Day—a 15-min show on the LED video wall at the Comcast Center in Philly. This year's holiday footage includes scenes from "The Nutcracker" performed by the **PA Ballet** as well as a sleigh ride through snow-covered PA.

TV Everywhere: **CableFAX** will tackle TV Everywhere and how authenticated content will likely evolve at our Dec. 1 Webinar. More info at: http://www.cablefax.com/cfp/webinars/2011_Dec01/

Editor's Note: Your next issue of **CableFAX Daily** will arrive Mon evening. Happy Thanksgiving!

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CableFAX Week in Review

Company	Ticker	11/23 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
DIRECTV:	DTV	44.79	(3.93%)	12.17%
DISH:	DISH	23.27	(5.9%)	18.36%
DISNEY:	DIS	33.40	0.03%	(10.96%)
GE:	GE	14.73	(5.88%)	(17.76%)
NEWS CORP:	NWS	16.30	(3.09%)	(0.73%)
MSOS				
CABLEVISION:	CVC	14.22	(4.24%)	(57.98%)
CHARTER:	CHTR	50.98	(3.65%)	30.92%
COMCAST:	CMCSA	21.07	(1.68%)	(4.1%)
COMCAST SPCL:	CMCSK	20.89	(1.51%)	0.38%
GCI:	GNCMA	8.81	(9.46%)	(30.41%)
KNOLGY:	KNOL	13.30	(3.2%)	(14.91%)
LIBERTY CAPITAL:	LCAPA	73.83	(5.83%)	18.01%
LIBERTY GLOBAL:	LBTYA	39.29	(4.59%)	11.05%
LIBERTY INT:	LINTA	15.21	(4.52%)	(3.55%)
SHAW COMM:	SJR	19.66	(5.25%)	(8.04%)
TIME WARNER CABLE:	TWC	57.67	(4.57%)	(12.66%)
VIRGIN MEDIA:	VMED	22.29	(3.04%)	(18.17%)
WASH POST:	WPO	336.19	(3.48%)	(23.51%)

Company	Ticker	11/23 Close	1-Week % Chg	YTD %Chg
PROGRAMMING				
AMC NETWORKS:	AMCX	34.60	(7.41%)	(13.17%)
CBS:	CBS	23.44	(5.41%)	23.04%
CROWN:	CRWN	1.32	(15.38%)	(49.62%)
DISCOVERY:	DISCA	39.04	(3.89%)	(6.38%)
GRUPO TELEVISIA:	TV	18.97	(6.14%)	(26.84%)
HSN:	HSNI	34.19	(4.95%)	11.55%
INTERACTIVE CORP:	IACI	39.19	(5.29%)	36.55%
LIBERTY STARZ:	LSTZA	64.99	(5.73%)	(2.24%)
LIONSGATE:	LGF	8.40	(2.21%)	29.03%
LODGENET:	LNET	2.08	(6.73%)	(51.06%)
NEW FRONTIER:	NOOF	1.10	(0.9%)	(41.8%)
OUTDOOR:	OUTD	6.17	9.79%	(13.95%)
SCRIPPS INT:	SNI	37.34	(6.23%)	(27.85%)
TIME WARNER:	TWX	32.17	(4.28%)	0.00%
VALUEVISION:	VVTV	1.67	(15.23%)	(72.67%)
VIACOM:	VIA	50.03	(4.45%)	9.09%
WWE:	WWE	9.18	(4.28%)	(35.53%)

Company	Ticker	11/23 Close	1-Week % Chg	YTD %Chg
TECHNOLOGY				
ADVANTAGE:	AEY	2.01	0.50%	(35.99%)
ALCATEL LUCENT:	ALU	1.48	(22.11%)	(50%)
AMDOCS:	DOX	27.54	(4.24%)	0.25%
AMPHENOL:	APH	41.71	(7.29%)	(20.97%)
AOL:	AOL	13.63	(7.47%)	(42.51%)
APPLE:	AAPL	366.99	(2.12%)	13.77%
ARRIS GROUP:	ARRS	10.02	3.62%	(10.7%)
AVID TECH:	AVID	6.75	(4.93%)	(61.34%)
BLNDER TONGUE:	BDR	1.14	(51.9%)	(45.71%)
BROADCOM:	BRCM	30.43	(7.14%)	(30.13%)
CISCO:	CSCO	17.41	(5.51%)	(13.96%)
CLEARWIRE:	CLWR	1.54	4.76%	(70.1%)
CONCURRENT:	CCUR	3.59	(0.55%)	(29.05%)
CONVERGYS:	CVG	11.57	(3.82%)	(12.15%)
CSG SYSTEMS:	CSGS	14.00	(5.41%)	(26.08%)
ECHOSTAR:	SATS	20.52	(8.96%)	(17.82%)

Company	Ticker	11/23 Close	1-Week % Chg	YTD %Chg
GOOGLE:	GOOG	570.11	(4.16%)	(4.02%)
HARMONIC:	HLIT	4.72	(11.28%)	(44.92%)
INTEL:	INTC	22.70	(6.55%)	7.94%
JDSU:	JDSU	9.88	(10.1%)	(31.77%)
LEVEL 3:	LVL	18.33	(5.17%)	1770.41%
MICROSOFT:	MSFT	24.47	(3.28%)	(12.33%)
MOTOROLA MOBILITY:	MMI	38.53	(0.59%)	32.41%
RENTAK:	RENT	12.65	(5.39%)	(58.06%)
SEACHANGE:	SEAC	7.32	(15.86%)	(14.39%)
SONY:	SNE	16.27	(3.78%)	(54.44%)
SPRINT NEXTEL:	S	2.47	(46.54%)	(41.61%)
THOMAS & BETTS:	TNB	48.49	(5.11%)	0.39%
TIVO:	TIVO	9.38	(6.2%)	8.69%
UNIVERSAL ELEC:	UEIC	14.37	(9.62%)	(49.35%)
VONAGE:	VG	2.26	(12.4%)	0.89%
YAHOO:	YHOO	14.94	(2.86%)	(10.16%)

Company	Ticker	11/23 Close	1-Week % Chg	YTD %Chg
TELCOS				
AT&T:	T	27.55	(3.81%)	(6.23%)
VERIZON:	VZ	35.35	(3.04%)	(1.2%)

Index	Value	1-Week % Chg	YTD %Chg	
MARKET INDICES				
DOW:	DJI	11257.55	(4.57%)	(2.76%)
NASDAQ:	IXIC	2460.08	(4.37%)	(7.27%)
S&P 500:	GSPC	1161.79	(4.43%)	(7.62%)

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. OUTDOOR:	6.17	9.79%
2. CLEARWIRE:	1.54	4.76%
3. ARRIS GROUP:	10.02	3.62%
4. ADVANTAGE:	2.01	0.50%
5. DISNEY:	33.40	0.03%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. BLNDER TONGUE:	1.14	(51.9%)
2. SPRINT NEXTEL:	2.47	(46.54%)
3. ALCATEL LUCENT:	1.48	(22.11%)
4. BIGBAND:	2.26	(20.42%)
5. SEACHANGE:	7.32	(15.86%)

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Speed, Time and Volume

Commentary by Steve Effros

NCTA CEO Michael Powell is following in the footsteps of former CEO Kyle McSillarow. He's doing something very rare for Washington, DC. He's giving speeches that actually have significant substance. We should be listening more carefully.

The other day he spoke (usually he speaks extemporaneously, and he's really good at it!) about the likelihood, as has been pointed out here for quite some time, that the industry will at least be experimenting with, if not going totally toward, a model of unit based pricing for our broadband services.



Now whether we ultimately go with caps, buckets or meters is an unknown for now. But clearly the "meter" with its inherent fairness aspect of having folks pay for what they use is one of the likely options. The problem, as Michael pointed out, is that numerous studies show that our customers don't really have any idea of how much of our service they are in fact using. That while the Internet cognoscenti are very comfortable talking about speed ("20 Mb/s") and volume ("2 Gigs, 4Gb" etc.) there are a lot of folks who have no idea what all that gibberish means. They're used to thinking in terms of time.

Now you and I know that even though my wife has the computer on a lot of times a day, and is checking her email, etc., she's not really using very much bandwidth. Email doesn't use it. She doesn't relate to use that way. She's "on the computer" a lot, so from her point of view she is "using the Internet" a lot.

Again, as we all know, a teenager watching videos, playing interactive games and using BitTorrent on that same computer can be eating up bandwidth at an amazing rate. One is, potentially, a "power user" while the other

is an average, or even light user. The point Michael was making, and he is absolutely right, is that if we as an industry are going to migrate to new ways of selling broadband service we have an obligation, first, to educate our customers as to what we are talking about when we talk about light, average, heavy or power user of broadband services.

While the under-30 (or maybe 40) set does talk in the vocabulary of speed and volume, not everyone does. That's not to say we should abandon those measurements. They are useful. After all, every kid knows how much music he or she can put on 2Gb iPod versus a 16Gb version, and Apple seems to have done OK using those measurements.

But not surprisingly, if you do a survey and ask folks, without giving them any frame of reference first, whether they use the Internet "a lot" or "a little" they won't know how to answer you. It's like asking whether you routinely speed in your car without telling you whether you are on a highway or a 25Mph road. The answers are somewhat meaningless until you give context.

So what we have to do, now, is give context. Provide an easy-to-access "usage" meter. Tell folks that watching one HD movie every day would fit "average" use, if that's accurate, but three movies a day would be "heavy" and five would be "power user." Or whatever other set of understandable measures we come up with.

Michael is right. If we're going to successfully alter the way we charge for the services we offer, we have to start by teaching our customers how they are using those services, in language they all can relate to.

Steve

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