

CableFAX Daily™

Monday — November 30, 2009

What the Industry Reads First

Volume 20 / No. 228

Real Returns: Fantasy Football Craze Catalyst for Growth on Many Levels

Compelling match-ups and storylines have certainly helped to spur growth in NFL viewership this season. *Brett Favre's* Oct win against his former Packers teammates, for example, catapulted **ESPN's MNF** to all-time cable records of 21.8mln total viewers and 15.14mln homes. Yet beneath the hype and away from the field, the NFL's programming partners continue to heavily target fantasy football participants with news and content—and the results are impressive. "Fantasy football really taps into the communal aspect of sports," said **ESPN.com** managing ed *Patrick Stiegman*. "It offers one of the most hardcore fan bases we have, generates great overall buzz for the sport [and leads to] a significant increase in viewers of our games and consumption of our content." As evidence, Stiegman points to "Fantasy Football Now," ESPN.com's 1st related online show that's now simulcast on **ESPN2**. Uniques to the show are up 300% and ratings on The Deuce have increased 32% in the Sun time slot, including a whopping 245% among men 18-34. "I think you'll see fantasy content spread throughout all football programming," said Stiegman. That trending can be already seen in myriad places. **NFL Net** has expanded several fantasy-related shows to include airings on multiple days, and its Sun "NFL Gameday" thrust, which has added 2 additional programming hours and spotlights team/player match-ups, injuries, etc, remains the net's most-viewed programming. HH delivery is up 45% this season alone. And perhaps the most overt nod to the fantasy-induced "fanaticism on football," as NFL Net exec prod *Eric Weinberger* calls it, is the net's launch this year of **NFL RedZone**, which delivers key touchdowns and game moments from every Sun NFL game. "We're thrilled with the way this has started," said Weinberger, adding that fantasy football nicely generates "more interest in NFL football, which is hard to believe sometimes." Like all NFL media players are doing, NFL Net is promoting cross-platform content consumption with fantasy as a key driver. "Fantasy football is really the 1st social network," said **NFL Online** gm *Laura Goldberg*, noting the beguiling interaction of participants with fellow competitors and across platforms and devices. Goldberg attributes much of the site's record-breaking year—avg stay/user is up 40%, to more than 30min—to fantasy football, saying it produces a lot of the traffic related to its game-tracking apps. "Watching fantasy football is going to become more and more of a 2- or 3-screen experience," she said. Fantasy football is about rev too. **ESPN.com**, **NFL.com** and **CBSSports.com** all manage leagues for a fee, and the latter, which 1st started doing so in '97, continues to see double-digit increases

The CableFAXIES awards

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in subscription and related ad rev. "That important dual revenue stream is a testament to the strength of fantasy football," said **CBS Interactive** svp/CBSSports.com gm *Jason Kint*, noting that "we've learned over the years how we can integrate the best content." ESPN.com's also enjoying notable growth in its subscription-content, much of it fantasy-related, and like others, Stiegman sees ample room to run in the fantasy space. "I don't think we're anywhere near the ceiling yet," he said.

When the Going Gets Tough: With several programming deals up at year-end (most notably **Fox**), **Time Warner Cable** has launched a campaign against "unfair price demands by programmers." The MSO's "Roll Over/Get Tough" campaign is a warning shot that it's prepared to lose programming if prices get too high. "We want [customers] to know why we fight so hard on these issues—if we Roll Over, they pay the price. If we Get Tough, they may lose their favorite shows until we reach a reasonable agreement," pres/CEO *Glenn Britt* said in a statement. In addition to cross-channel spots, print ads are slated to appear in the coming days in several newspapers, including the *Dallas Morning News* and **News Corp**-owned *NY Post*. "We've Got a Hard Choice," one TWC print ad says, followed by remote control buttons labeled "Roll Over" and "Get Tough." The ad says that when contracts are up for renewals, programmers are seeking price hikes—sometimes as much as 300%. "You're our customers, so help us decide what to do. Go to www.RollOverOrGetTough.com and let us know if you want us to Roll Over, or Get Tough," the ad concludes. TWC's deal with Fox/News Corp expires Dec 31, and is massive because it includes Fox O&Os, RSNs and several cable nets (like **FX** and **Speed**). The close of '09 also marks the end of several other programming contracts, including a retrans pact with **Sinclair** (**Mediacom** has filed a retrans complaint against it at the **FCC**) and **Scripts Nets Interactive** (it is seeking a hefty increase for **Food**). A TWC spokesperson said the campaign is not aimed at any specific programmer and was launched to inform customers and give them a voice. "We're not trying to attack programmers, but we need to find a better way to resolve these issues," Britt's statement said. The Website will evolve over time, so we'll be keeping an eye on it to see if TWC eventually singles out any networks.

Bresnan Changes: **Bresnan** founder *Bill Bresnan* has relinquished the CEO title, elevating pres *Jeff DeMond* to the post, effective immediately. Bresnan is assuming the role of chmn. "This transition is the next step in a succession plan begun several years ago to ensure continuity in the goals of our company," Bresnan said. "Jeff has been a key member of our executive team for 24 years and it is in that breadth of experience that my confidence in him to maintain our company's culture, philosophy and business direction is rooted."

TiVo Earnings: **TiVo** posted a 9th straight Q of adjusted EBITDA profitability, but a dip in sales led to quarterly loss while the co shed 314K subs. Still, as a billing error at **DirectTV** led to a 1-time reduction of approx 146K subs from MSOs and broadcasters, pres/CEO *Tom Rogers* is bullish on '10. Expected are additional domestic rollouts with DirectTV, he said, plus "acceleration in **Comcast** deployment of the TiVo service." Rogers noted new Comcast spots in New England focused on the benefits of the TiVo On-Line Scheduler, and said "porting for tru2way is very much part of [Comcast's] game plan for TiVo." The co's mass distribution deal with **Cox** "is also progressing," he said. The planned launch is now beyond the testing phase and onto the "very early stage of deployment in the New England region. We expect to rollout, to pick up speed, and increase in scope throughout 2010," according to Rogers. Also next year, TiVo's strategic marketing partnership with **Best Buy** kicks off.

Clear: **Clearwire** secured an additional \$920mln in debt financing, which together with incremental funding of approx \$360mln from a bond offering that closed Tues and new investments from **Sprint**, **Comcast**, **Time Warner Cable** and **Bright House** (**Cfax**, 11/11) gives the co approx \$2.8bln in fresh capital—a total in excess of the amount needed to achieve its '10 buildout plans. Clearwire shares jumped 4.6% on the news.

Programming: **C-SPAN** will broadcast **Facebook** co-founder *Chris Hughes*' keynote at the **NAMIC** Conference last month on Sun at noon ET. -- **ESPN Deportes** will provide Portuguese-language telecasts of more than 40 live matches of next summer's World Cup (Jun 11-Jul 11).

On the Circuit: **WICT**'s '10 board includes **Time Warner Cable**'s *Ellen East* as chair, **Cox**'s *Kathy Payne* as vice chair, and **Suddenlink**'s *Mary Medulski* as treasurer. Visit Wict.org for a full list of members.

Business/Finance: Exploring the possibility of a sale, **MGM** has sent confidentiality agreements to approx 20 interested parties, according to *Reuters*, including **Time Warner**, **News Corp** and **Lionsgate**.

CableFAX Week in Review

Company	Ticker	11/25 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
BRITISH SKY:	BSY	36.33	1.76%	27.92%
DIRECTV:	DTV	31.89	1.11%	39.20%
DISH:	DISH	21.12	5.65%	90.44%
DISNEY:	DIS	30.61	2.00%	34.91%
GE:	GE	16.18	3.78%	(0.12%)
NEWS CORP:	NWS	14.21	0.57%	48.33%
MSOS				
CABLEVISION:	CVC	25.56	(0.16%)	51.78%
COMCAST:	CMCSA	15.07	0.40%	(10.72%)
COMCAST SPCL:	CMCSK	14.25	(0.14%)	(11.76%)
GCI:	GNCMA	6.21	1.14%	(23.24%)
KNOLOGY:	KNOL	10.00	0.60%	93.80%
LIBERTY CAPITAL:	LCAPA	22.60	(2.21%)	379.83%
LIBERTY GLOBAL:	LBTYA	20.17	(1.08%)	26.70%
LIBERTY INT:	LINTA	10.48	(1.41%)	235.90%
MEDIACOM:	MCCC	4.09	(3.76%)	(4.88%)
RCN:	RCNI	9.01	4.28%	52.71%
SHAW COMM:	SJR	19.31	3.71%	9.22%
TIME WARNER CABLE:	TWC	43.49	2.59%	102.75%
VIRGIN MEDIA:	VMED	16.63	1.40%	233.27%
WASH POST:	WPO	417.76	0.84%	7.05%

Company	Ticker	11/25 Close	1-Week % Chg	YTD %Chg
PROGRAMMING				
CBS:	CBS	13.55	5.53%	65.45%
CROWN:	CRWN	1.51	(9.58%)	(47.02%)
DISCOVERY:	DISCA	31.85	2.21%	124.93%
GRUPO TELEVISIA:	TV	20.70	(0.29%)	38.55%
HSN:	HSNI	18.41	(1.23%)	153.23%
INTERACTIVE CORP:	IACI	19.74	1.70%	25.49%
LIBERTY:	L	36.00	1.41%	27.43%
LIBERTY STARZ:	LSTZA	49.98	(0.54%)	7.02%
LIONSGATE:	LGF	4.99	(1.77%)	(9.27%)
LODGENET:	LNET	5.00	(5.3%)	614.29%
NEW FRONTIER:	NOOF	1.80	(5.26%)	5.88%
OUTDOOR:	OUTD	5.76	(5.57%)	(23.1%)
PLAYBOY:	PLA	3.94	2.60%	82.41%
RHI:	RHIE	0.63	(13.7%)	(92.24%)
SCRIPPS INT:	SNI	40.58	0.84%	84.45%
TIME WARNER:	TWX	31.32	(1.01%)	211.33%
VALUEVISION:	VTV	3.38	0.30%	924.24%
VIACOM:	VIA	32.01	1.55%	59.10%
WWE:	WWE	15.88	(1.31%)	43.32%

Company	Ticker	11/25 Close	1-Week % Chg	YTD %Chg
TECHNOLOGY				
3COM:	COMS	7.41	(0.54%)	225.00%
ADC:	ADCT	6.08	2.88%	11.15%
ADVANTAGE:	AEY	2.20	5.26%	23.60%
ALCATEL LUCENT:	ALU	3.46	(4.42%)	60.93%
AMDOS:	DOX	27.10	2.53%	48.17%
AMPHENOL:	APH	42.51	1.12%	77.27%
APPLE:	AAPL	204.19	2.14%	139.24%
ARRIS GROUP:	ARRS	10.15	0.69%	27.67%
AVID TECH:	AVID	11.97	1.61%	9.72%
BIGBAND:	BBND	3.64	(0.55%)	(34.06%)
BLNDER TONGUE:	BDR	1.01	6.32%	0.00%
BROADCOM:	BRCM	29.56	2.78%	74.19%

Company	Ticker	11/25 Close	1-Week % Chg	YTD %Chg
CISCO:	CSCO	23.74	1.19%	45.64%
CLEARWIRE:	CLWR	5.68	0.18%	15.21%
COMMSCOPE:	CTV	27.25	1.04%	75.35%
CONCURRENT:	CCUR	3.44	(4.18%)	1.18%
CONVERGYS:	CVG	11.49	0.35%	79.25%
CSG SYSTEMS:	CSGS	16.82	(0.06%)	(3.72%)
ECHOSTAR:	SATS	20.04	(0.55%)	34.77%
GOOGLE:	GOOG	585.74	2.77%	90.39%
HARMONIC:	HLIT	5.25	0.57%	(6.42%)
INTEL:	INTC	19.34	0.52%	31.92%
JDSU:	JDSU	7.71	5.76%	111.23%
LEVEL 3:	LVLTL	1.23	1.65%	75.71%
MICROSOFT:	MSFT	29.79	0.57%	53.24%
MOTOROLA:	MOT	8.28	0.00%	86.91%
OPENTV:	OPTV	1.53	2.00%	24.39%
PHILIPS:	PHG	28.46	6.35%	43.23%
RENTRAK:	RENT	15.02	(2.78%)	34.11%
SEACHANGE:	SEAC	5.64	(0.53%)	(21.78%)
SONY:	SNE	27.46	2.46%	25.56%
SPRINT NEXTEL:	S	3.84	2.13%	109.84%
THOMAS & BETTS:	TNB	37.02	(0.19%)	54.12%
TIVO:	TIVO	10.22	(4.13%)	42.74%
TOLLGRADE:	TLGD	6.01	0.84%	25.73%
UNIVERSAL ELEC:	UEIC	22.26	0.32%	37.24%
VONAGE:	VG	1.29	11.21%	95.45%
YAHOO:	YHOO	15.30	(0.52%)	25.41%

Company	Ticker	11/25 Close	1-Week % Chg	YTD %Chg
TELCOS				
AT&T:	T	27.08	4.07%	(4.98%)
QWEST:	Q	3.91	4.55%	7.42%
VERIZON:	VZ	32.03	5.26%	(5.52%)

Index	Value	1-Week % Chg	YTD %Chg	
MARKET INDICES				
DOW:	DJI	10464.40	1.42%	19.23%
NASDAQ:	IXIC	2176.05	1.40%	37.98%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. VONAGE:	1.29	11.21%
2. PHILIPS:	28.46	6.35%
3. BLNDER TONGUE:	1.01	6.32%
4. JDSU:	7.71	5.76%
5. DISH:	21.12	5.65%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. RHI:	0.63	(13.7%)
2. CROWN:	1.51	(9.58%)
3. OUTDOOR:	5.76	(5.57%)
4. LODGENET:	5.00	(5.3%)
5. NEW FRONTIER:	1.80	(5.26%)

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