

CableFAX Daily™

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What the Industry Reads First

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Intricate Pipeline: Online Availability of TV Content Continues to Grow

The number of outlets offering free online viewing of TV eps and clips has increased greatly this year—so much so that we're wondering just how many people, come the DTV transition in Feb, will decide to ditch TV altogether and use the Web as their primary source for TV content. OK, that's an extreme supposition. But who thought myriad download options like **Sling.com** and **IMBD.com** would follow **Hulu** and **Fancast**, which both endured skepticism when launching earlier this year with content from rival broadcasters and cable nets, and with an unproven ad-supported model? **EchoStar/Sling Media** sent Sling.com to the download party Tues, with programming from over 90 content providers spanning 150 content brands. **CBS, NBC, Fox, Discovery, Comcast** and **AETN** are all represented at the site, or soon will be. Comcast is in a unique position as both an operator and content provider—camps often seen as having different views of online content proliferation—and chose to launch Fancast and offer content from its **E!** and **Style** to Sling.com as alternative ways to reach customers. Web video "is a format that has exploded, and we want to be a part of that," said a spokesperson for the MSO. "Online has become another programming window." Through its online forays, said the spokesperson, Comcast has noticed a trend that others have also noted: online video viewing, particularly of TV eps, enhances TV viewership rather than cannibalizes it. Plus, there's the added bonus of reaching younger demos that rely heavily on broadband for all types of entertainment. According to **Nielsen's** latest "A2/M2 Three Screen Report," both TV and Internet use by the avg American increased YOY in 3Q, with Web use achieving slightly greater growth. That same avg American also spends more than 6 hours/month watching time-shifted TV, further suggesting that content must now be versatile and ubiquitous.

Obit: Rogers Comm founder/CEO *Ted Rogers* has passed away at the age of 75. After being hospitalized recently for an existing heart condition, Rogers died at his Toronto home. Rogers also owned the Toronto Blue Jays. "The entire U.S. cable industry today mourns the loss of our friend, Ted Rogers, a great leader and visionary in cable telecommunications whose impact is felt well beyond his beloved Canada," said **NCTA** pres/CEO *Kyle McSarrow* in a statement. "Ted shared his pioneering vision with this industry for more than 40 years... We will truly miss his passionate leadership." **CableLabs** pres/CEO *Dick Green* noted that Rogers was a pioneer of new technologies, with Rogers the 1st company to offer cable modem service and initiate the transition from entertainment to telecom services. "The cable industry owes Ted Rogers an enormous debt of gratitude," Green said. "His love for technology and its development contributed in many ways to the success that the industry has achieved."

Cfax 100: The wait is over. Our annual **CableFAX 100** magazine is out. If you need a peek before your copy arrives in the mail, view it online at: www.cable360.net/cablefaxmag/. In a twist, we thought we'd actually try to keep the list to 100 people—give or take a few—this year. Thank you to all who gathered at the National Press Club Tues for our CableFAX Maga-



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zine Event luncheon honoring the 100, the Top Women in Cable and our new 20-to-Watch list. One of the highlights came shortly after **ESPN's** *Sean Bratches* said colleague *Rosa Gatti* (who was being honored with our Community Service Award) had touched "thousands if not millions, and that's not an overstatement." **SNY** pres *Steve Raab* drove that point home when accepting honors as a top regional player. More than 20 years ago, he was trying to get his foot in the door of sports, but no one was returning his calls. Someone passed along Gatti's phone number. Although you probably don't remember, "you were good enough to talk with me, Rosa... I'm one of the millions," Raab said. There were lighter moments as well, including when **Time Warner Cable** chief evp, programming officer *Melinda Witmer* poked fun of her Gatekeeper of the Year Award. She wondered who the Keymaster was and how she was supposed to save the industry from a 100ft tall Stay Puft Marshmallow Man (We love "Ghostbusters" too, Melinda). Other special honors included **Discovery Nets** for "Reinvention of the Year," **Comcast** for the Diversity Award and **USA** for Rebranding of the Year. Outgoing **Cable Positive** chief *Steve Villano* was on hand after just announcing that he won't renew his contract when it expires in July. "I didn't do any of this alone," he said, pointing to the work of industry execs and the CP team. "The organization is ready to move into a whole new era." Several speakers referenced the economy and belt-tightening, so thumbs up to **Tennis Channel/Ovation's** *Ken Solomon*, who reminded us all that things could be worse—"after all, we could be building cars."

In the States: Ex-NBCU exec *James Walsh* was sentenced Tues to 21 months in prison after pleading guilty in Aug to conspiracy and wire fraud in a scheme to steal more than \$800K from the company. Walsh, who worked as NBCU's treasury manager, left in '06. His boss, former NBCU treasurer *Victor Jung*, pled guilty in May to conspiracy and 3 counts of wire fraud. Jung is expected to be sentenced next week.

Open Chair: The classified sections of *The Washington Post*, *Washington Times*, *Politico* and *The Hill* featured a humorous ad Tues seeking applicants for the job of **FCC** chmn. Ad sponsor **Free Press** had a mission, of course, printing that the position requires advocacy for net neutrality, Internet access for all Americans and media ownership diversity. But this paragraph was also included: "Applicant must be willing to hold long and unruly public hearings and enjoy arcane telecom banter. Wardrobe malfunctions, **NASCAR** wreckage and fleeting expletives are discouraged." The ad directs readers to FreePress.net/wanted, where they can take a survey on the top 3 qualifications they'd most want in the next FCC chair.

Competition: **DISH** deployed **Amdocs** tech to improve logging and resolution of certain service calls.

Carriage: **Cablevision** added to its lineup **Bravo HD**, **CNBC HD+**, **Sci Fi HD** and **USA HD**. -- **RCN** has launched in Boston, Chicago and DC a new intl tier including 3 Indian channels, **Setanta Sports** and Greek-language net **Antenna Satellite**. The Global Passport tier is slated for all RCN markets, and will ultimately offer content in more than 20 languages.

Online: **Golf Channel** has inked a deal with online resource **GolfLink** to develop programming content for their respective Websites, and the net's digital sales team now exclusively offers GolfLink's branded ad inventory to clients.

Beta: **Discovery** ranked #1 in **Beta's** cable sub survey, with 30% of respondents mentioning it unaided as a favorite cable net. **History** (28%) and **ESPN** (22%) completed the top 3 basic nets. Discovery also paced basic nets in avg perceived value among men 18+ with \$1.74, ESPN (\$1.73) and History (\$1.66) were close behind. Among women 18+, **Weather Channel** led with \$1.46, followed by **Lifetime** (\$1.43) and Discovery (\$1.34).

Ratings: **Nat Geo** is the 1st net to sign up for **Nielsen's** DigitalPlus service, offering commercial performance data culled

We tv Celebrates its Best Year Ever in 2008!

- Fastest Growing Cable Network
- Double-Digit Percent Growth vs. Last Year
- +46% W18-49 +38% W25-54
- 72.2 MM HH
- 65% Original Programming in Primetime
- The Best Bridal Shows on Television



Nielsen Media Research, Live Data. Prime M-Su 8p-11p. WE tv 2008 YTD (12/31/07-11/9/08) vs. prior full yrs for W18-49 & W25-54 (000s). 2008 YTD (12/31/07-11/9/08) vs. 2007 YTD (11/07-11/11/07), % growth for W2+ (000) & P2+ (000) - all cable networks, excl. nets in under 65 million HHs and news networks. W18-49 & W25-54 (000) % growth 2008 YTD vs. 2007 YTD. Nov08 Cov Area HH Universe Estimate. Subj to qualifications upon req't.



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BUSINESS & FINANCE

from more than 330K set tops in Charter's L.A. system.

Programming: Sci Fi greenlit "Carpica," a prequel series to "Battlestar Galactica." -- **WE** debuts undercover diet intervention series, "I Want to Save Your Life," in 1Q09. -- **Sundance Channel's** ramping its **Sundance Film Festival** coverage with "31 Days of Sundance" (Jan 1-31), a multi-platform event featuring a nightly double bill of former Festival favorites; festival coverage including filmmaker profiles and critics' picks; exclusive VOD offerings; and online coverage at Sundancechannel.com/festival.

Honors: **Bloomberg** picked up 2 Emmys for business & financial reporting Tues, while **CNBC** won 1 award. **CNN** won an Emmy nod in the promotional announcements category.

People: **OWN: The Oprah Winfrey Network** named *Timothy Kuryak* and *Jill Dickerson* vp, programming.

Business/Finance: At least 3 groups have submitted offers to purchase the Chicago Cubs, Wrigley Field and a 25% stake in **Comcast SportsNet Chicago** from Tribune Co, according to reports. *Reuters* said the bids were led by **Incapital** CEO *Tom Ricketts*; **Clarion Capital Partners** managing partner *Marc Utay*; and Chicago real estate exec *Hersh Klaff*. -- **GE** said it expects 4Q net income of 50-52 cents/share, the low end of its previously announced range of 50-56 cents/share.

CableFAX Daily Stockwatch

Company	12/02 Close	1-Day Ch	Company	12/02 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BROADCASTERS/DBS/			AMDOCS:	17.07	0.17
BRITISH SKY:	25.35	1.34	AMPHENOL:	21.56	0.98
DIRECTV:	20.39	1.00	APPLE:	92.47	3.54
DISNEY:	21.46	1.13	ARRIS GROUP:	6.64	0.16
ECHOSTAR:	10.60	0.50	AVID TECH:	11.43	0.41
GE:	17.61	2.11	BIGBAND:	4.05	0.69
HEARST-ARGYLE:	7.57	0.18	BLNDER TONGUE:	0.86	(0.08)
NEWS CORP:	8.01	0.59	BROADCOM:	14.24	0.12
MSOS					
CABLEVISION:	13.37	0.92	CISCO:	15.32	0.36
CHARTER:	0.17	0.01	COMMSCOPE:	10.92	0.68
COMCAST:	16.00	0.55	CONCURRENT:	3.29	0.02
COMCAST SPCL:	15.40	0.53	CONVERGYS:	5.71	0.26
GCI:	7.82	0.71	CSG SYSTEMS:	15.01	(0.06)
KNOLOGY:	5.24	0.36	ECHOSTAR HOLDING:	14.75	(1.13)
LIBERTY CAPITAL:	3.03	(0.04)	GOOGLE:	275.11	9.12
LIBERTY ENT:	10.94	0.15	HARMONIC:	4.56	0.23
LIBERTY GLOBAL:	12.56	0.85	JDSU:	2.61	0.25
LIBERTY INT:	2.36	0.11	LEVEL 3:	0.80	(0.04)
MEDIACOM:	2.22	0.12	MICROSOFT:	19.15	0.54
SHAW COMM:	16.81	(0.33)	MOTOROLA:	4.27	0.16
TIME WARNER CABLE:	20.45	1.02	NDS:	47.28	(0.12)
VIRGIN MEDIA:	4.12	0.41	NORTEL:	0.63	0.03
WASH POST:	379.70	25.45	OPENTV:	1.12	0.09
PROGRAMMING					
CBS:	6.41	0.85	PHILIPS:	15.83	0.95
CROWN:	2.15	0.22	RENTRAK:	9.60	0.00
DISCOVERY:	13.70	0.46	SEACHANGE:	7.65	0.34
EW SCRIPPS:	2.18	(0.25)	SONY:	19.22	1.00
GRUPO TELEVISA:	14.67	0.30	SPRINT NEXTEL:	2.66	0.55
HSN:	2.77	(0.07)	THOMAS & BETTS:	18.15	1.47
INTERACTIVE CORP:	14.39	0.43	TIVO:	5.36	0.79
LIBERTY:	25.50	2.02	TOLLGRADE:	4.91	0.16
LODGENET:	0.60	(0.1)	UNIVERSAL ELEC:	15.75	1.52
NEW FRONTIER:	1.56	0.05	VONAGE:	1.26	0.15
OUTDOOR:	5.87	0.45	YAHOO:	11.50	0.76
PLAYBOY:	1.56	0.15	TELCOS		
RHI:	4.50	0.93	AT&T:	28.04	1.08
SCRIPPS INT:	24.80	0.04	QWEST:	2.99	0.00
TIME WARNER:	9.00	0.49	VERIZON:	32.13	1.46
VALUEVISION:	0.51	(0.02)	MARKET INDICES		
VIACOM:	16.21	0.32	DOW:	8419.09	270.00
WWE:	11.05	0.43	NASDAQ:	1449.80	51.73
TECHNOLOGY					
3COM:	2.09	0.21			
ADC:	6.74	0.16			
ADVANTAGE:	1.45	0.17			
ALCATEL LUCENT:	2.09	0.14			



CableFAX's Best of the Web Awards

is the industry's top honor in digital space, recognizing outstanding Web sites and digital initiatives among cable programmers (networks and independents), operators, vendors and associations.

To View Categories and Enter: Go to CableFAX.com/cfp/BOW

Awards Timeline

Entry Deadline: December 3, 2008
 Late Entry Deadline: December 10, 2008
 Award Event: February 26, 2009

Sponsorship/Advertising Information Contact:
 Debbie Vodenos at 301-354-1695 or dvodenos@accessintel.com.