

CableFAX Daily™

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What the Industry Reads First

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1-2 Punch: Two Cablers Top Globes Nominations for First Time

Cable has made history yet again when it comes to award nominations, with 2008 marking the first time 2 cable nets led all other TV nets in Golden Globe nominations. As usual, awards darling **HBO** led the pack with 22 nominations, but instead of a broadcaster taking 2nd place, **Showtime** nabbed the silver with 8 nods. Cable also dominated the big series categories, such as Best Drama TV Series, with Showtime's "Dexter," HBO's "In Treatment," and "True Blood" and **AMC**'s "Mad Men" in the running. The only broadcast series nominated is **Fox**'s "House." Showtime's "Weeds" and "Californication" and HBO's "Entourage" joined **NBC**'s "30 Rock" and "The Office" in the Best Comedy Series category. Showtime's 8 nominations were a record for the premium net, with "Dexter" one of only 3 first-time series nominees (The other 2 were HBO's freshman series, "Treatment" and "Blood"). Showtime chmn/CEO *Matt Blank* said part of the reason it may have taken a little longer for Dexter to get the recognition is that the channel is "mathematically disadvantaged" by being in only about 16mln homes. "If you're a cable network and you have a show that's in 80 or 90mln homes, or if you're a broadcast network and you have a show that's in 108-110mln homes, you have a natural advantage of people knowing your programming and appreciating it," he said. "We think that being with CBS last year... probably helped us." (Corporate sibling **CBS** ran "Dexter" eps earlier this year). AMC led the basic cable nets in nominations this year, with 3. In addition to "Mad Men's" best series nod, actors *Jon Hamm* and *January Jones* were recognized. Was AMC's 2nd Globe for "Mad Men" sweeter than last year's rookie nod? "It feels good both times, but it's a different feeling this time. The Globes [last year] were the first broad recognition that the show had struck a chord, and of course we were thrilled when Jon Hamm won last year," AMC president *Charlie Collier* said. [Editor's Note: We, of course, consider Hamm's appearance at the **CableFAX 100** lunch last year, 1 day before the Globe nomination, to be the first broad recognition. Just humor us]. While Collier couldn't comment in depth on creator *Matt Weiner*'s contract talks—"we're very optimistic"—or specific ways the economy might affect Mad Men—the economy "will affect everyone," he said—he's upbeat about AMC's slate of movies and 3 originals next year. "We just had our best November, and that was without originals," he said (*Cfax*, 12/9). Other cable nets receiving nominations: **USA** (2), **Lifetime** (1) and **TNT** (1). Acclaimed series not making the list include **FX**'s "The Shield," **HBO**'s "The Wire," (both of which ended this year) and AMC's "Breaking Bad." -- Showtime's record-breaking honors comes at a nice time with the Paley Center for Media honoring the net in L.A. Thurs night. "To have that amount of nominations... I think is a real confirmation of our strategy and a real confirmation of all that we think these shows are doing for the brand right now," Blank said.

In the States: **Comcast** will begin rolling out this month in Chicago, Atlanta, Baltimore and Fort Wayne, IN, broadband tiers offering download speeds of up to 50Mbps. The launches bring to 10 the number of markets where the wideband services are available, and satisfies CEO *Brian Roberts*' stated goal of reaching 20% of the MSO's footprint this year.



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OVER 5 MILLION VIEWERS TOOK A JOURNEY TO THE EDGE OF THE UNIVERSE

Once again, the National Geographic Channel delivers stellar ratings.



Source: Nielsen Media Research, 12/07/08, Npower 8p-2a, 1-min qualifier, P2+

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Retrans: With no signs of an **FCC** mandated quiet period, retrans stand-offs continue to mount. **Young Broadcasting** is threatening to pull its signals from **DISH**. There were some signs of progress, with Young extending a contract that was set to expire on Dec 10 to 7pm PT Thurs (Dec 11). Young has 10 stations in 11 DISH markets, including Nashville (**WKRN**, **ABC** affil), San Fran (**KRON**, **My Network TV** affil) and Lansing, MI (**WLNS**, **CBS** affil).

On the Hill: A bill that would allow broadcasters to air emergency alerts and DTV transition info on their analog signals where technically feasible for 30 days after the Feb 17 DTV transition awaits Pres *Bush's* signature. The House passed it Wed night, and the Sen passed it last month. **NTIA** announced Thurs that more than 40mln converter box coupons have been requested to date, and more than 16mln coupons have been redeemed.

Advertising: Given the economic decline of recent months, ad data covering the current Q will likely trump **TNS Media's** numbers for the 1st 9 months of '08 in poignancy—especially given the 3Q boosts offered by the Olympics and Presidential election trail. Still, it's worth noting that cable has achieved 3.7% YOY growth in measured ad spending from Jan-Sept, greater than the 3.0% delivered by network TV and far exceeding the -1.7% for total measured advertising expenditures. Indicative of the economic slowdown are data for Internet ad spending, which exhibited 7% growth from Jan-Sept although growth rates have been declining for 5 straight Qs, said TNS. Among the period's top 10 advertisers: **Verizon** (+12.8%), **AT&T** (-13.7%), **Time Warner** (-10.5%), **News Corp** (+10.4%) and **Disney** (-6.4%). -- **Hallmark Channel** has become the 1st cable net to license The **NielsenConnections Brand Target Audience** products, letting the net document its programming's impact against advertiser's marketing targets. Last week, Hallmark inked a deal to begin early next year using the **Google TV Ads** platform to place ads on both Hallmark Channel and **Hallmark Movie Channel**.

Research: The worldwide set-top box market shrank 2% sequentially in 3Q to \$3.5bln because of declines in cable and satellite unit shipment, **Dell'Oro Group** reports. The declines were partially offset by IP set-top shipments, which increased 30% sequentially. "The consequence of the recession on the set-top box market will likely be subdued growth as fewer consumers choose high-end services, like high definition and digital video recorder, and more choose basic services that come as part of a bundle," said *Greg Collins*, vp, Dell'Oro Group. Also, fewer homes are being built. -- 77% of the total US Internet audience viewed online video in Oct, and the avg viewer watched 274min of video, according to **comScore**, compared to corresponding Apr numbers of 71% and 228min. More than 80% of 18-34s watched online video in the month, for an avg of 4.8 hours. Of note: **Hulu.com** keeps scaling the rankings of US online video properties by monthly video views and uniques, and in Oct ranked 6th in both metrics with a respective 235K and 24K—ahead of notables such as **Turner**, **Disney** and **ESPN**. Hulu's average video was viewed for 11.6min, the highest of the top 10.

Technology: **SageTV** has released a media player (\$200) that connects to HDTVs and allows viewing of Internet

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video, home videos and photos. Alternate computer software also grants the player HD DVR functionality.

VOD: HBO Sports said Sat's *Oscar de la Hoya* and *Manny Pacquiao* welterweight fight generated 1.25mln PPV buys, making it the highest performing PPV event this year with \$70mln in revenue. It is only the 4th time in boxing PPV history that a non-heavyweight event has attained the 1mln buy mark. -- **Bright House** has unwrapped a raft of holiday movies for consumers' on demand and online consumption. \$2 VOD choices include "A Christmas Story," "Elf" and "Home Alone," while the Road Runner Video Store at Videostore.RR.com offers 24-hour rentals (\$3-\$5) and purchases (\$10-\$18) of films such as "Snow Dogs" and "Barbie in the Nutcracker."

In the Courts: Disney and Starz reached a settlement in a suit Starz filed over Disney's Internet distribution of films to which the programmer claimed it has exclusive rights, according to court filings. Details weren't disclosed. Starz filed the suit in Mar '07.

People: Turner named *Michael Wright* to evp/programming head, **TBS, TNT** and **TCM**; *Phil Oppenheim* to evp, program planning and scheduling, TBS and TNT; and *Lillah McCarthy* to svp, original programming, TBS and TNT. The changes consolidate original programming, program planning and scheduling into 1 div. -- **Comcast Media Center** named *John Roy* vp, cable operations and engineering.

CableFAX Daily Stockwatch

Company	12/11 Close	1-Day Ch	Company	12/11 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	28.00	0.49	AMDOCS:	17.68	(0.44)
DIRECTV:	22.87	(0.26)	AMPHENOL:	21.16	(0.08)
DISNEY:	22.82	(0.53)	APPLE:	95.00	(3.21)
ECHOSTAR:	11.15	(0.44)	ARRIS GROUP:	6.81	(0.22)
GE:	17.05	(0.95)	AVID TECH:	10.81	(0.44)
HEARST-ARGYLE:	5.94	(0.97)	BIGBAND:	4.51	(0.05)
NEWS CORP:	8.55	(0.3)	BLNDER TONGUE:	0.90	0.03
MSOS					
CABLEVISION:	14.32	(0.74)	BROADCOM:	16.60	(0.19)
CHARTER:	0.15	(0.01)	CISCO:	16.91	(0.42)
COMCAST:	15.97	(0.48)	COMMScope:	13.11	(0.66)
COMCAST SPCL:	15.27	(0.45)	CONCURRENT:	3.51	(0.29)
GCI:	7.20	(0.54)	CONVERGYS:	6.07	(0.29)
KNOLOGY:	5.26	(0.31)	CSG SYSTEMS:	16.12	(0.45)
LIBERTY CAPITAL:	3.00	0.13	ECHOSTAR HOLDING:	15.08	0.05
LIBERTY ENT:	12.16	0.46	GOOGLE:	300.22	(8.6)
LIBERTY GLOBAL:	13.06	(0.55)	HARMONIC:	5.13	(0.07)
LIBERTY INT:	2.39	(0.26)	JDSU:	3.59	(0.03)
MEDIACOM:	2.76	(0.22)	LEVEL 3:	0.77	0.00
SHAW COMM:	16.84	(0.01)	MICROSOFT:	19.45	(1.16)
TIME WARNER CABLE:	19.60	(0.1)	MOTOROLA:	4.10	(0.07)
VIRGIN MEDIA:	4.30	(0.31)	NDS:	50.89	3.36
WASH POST:	379.99	(18.51)	NORTEL:	0.40	0.00
PROGRAMMING					
CBS:	7.75	(0.18)	OPENTV:	1.16	(0.15)
CROWN:	1.80	(0.4)	PHILIPS:	18.66	0.71
DISCOVERY:	12.96	(0.79)	RENTRAK:	9.63	0.03
EW SCRIPPS:	2.12	0.03	SEACHANGE:	6.59	(0.77)
GRUPO TELEvisa:	15.92	(0.47)	SONY:	21.04	0.19
HSN:	1.77	0.11	SPRINT NEXTEL:	2.08	(0.34)
INTERACTIVE CORP:	16.19	(0.5)	THOMAS & BETTS:	20.72	(1.49)
LIBERTY:	27.05	(0.95)	TIVO:	6.43	(0.3)
LODGENET:	0.65	0.01	TOLLGRADE:	4.48	0.03
NEW FRONTIER:	1.83	0.00	UNIVERSAL ELEC:	15.37	(1.38)
OUTDOOR:	6.52	(0.3)	VONAGE:	1.04	(0.17)
PLAYBOY:	2.07	0.02	YAHOO:	12.73	(0.67)
RHI:	4.91	(0.02)	TELCOS		
SCRIPPS INT:	22.25	(1.51)	AT&T:	27.94	(0.14)
TIME WARNER:	10.06	(0.1)	QWEST:	3.08	(0.27)
VALUEVISION:	0.43	(0.02)	VERIZON:	32.47	(0.27)
VIACOM:	17.57	(0.28)	MARKET INDICES		
WWE:	11.08	(0.9)	DOW:	8565.09	(196.33)
TECHNOLOGY					
3COM:	2.08	(0.01)	NASDAQ:	1507.88	(57.6)
ADC:	4.79	(0.22)			
ADVANTAGE:	1.35	(0.01)			
ALCATEL LUCENT:	2.41	(0.07)			

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PROGRAMMER'S PAGE with Chad Heiges and Seth Arenstein**Turner Tidbits**

Turner research chief *Jack Wakshlag* bowed Thurs TV viewership data covering '08-to-date, and I've extracted a few interesting points from the research while declining to include hackneyed (although still quite important) findings such as the precipitous decline in broadcast viewership and the corresponding increase for cable nets. First up is **truTV**, the brand with which Turner replaced **CourtTV** on Jan 1. Using **Nielsen** data through Dec 7, Wakshlag found that the net delivered the most-watched prime year in history among men 18-34, men 18-49 and men 25-54. Of course, when extrapolating beyond those male demos, CourtTV in '07 averaged a 1.0/924K in prime and a 0.6/524K in total day. Through Sept 30 of this year, truTV averaged a 0.93/832K in prime and a 0.63/569K in total day, with both metrics falling in each successive Q. Now let's peek at cable series' delivery in the coveted 18-49 demo. Season 4 & 5 of **Bravo's** "Project Runway" led the pack with an avg of 2.83mln total demo viewers, and was followed closely by the 2nd season of **USA's** "Burn Notice" (2.76mln), the 4th season of **MTV's** "The Hills" (2.75mln), the 12th season of **Comedy Central's** "South Park" (2.75mln), and the 4th season of **TNT's** "The Closer" (2.74mln). Plaudits to the enduring success of Kyle, Cartman and the boys! Next, the top new ad-supported original shows of the year: **USA's** "In Plain Sight" took the title by averaging 5.33mln total viewers, followed by **ABC Family's** "The Secret Life of the American Teenager" (3.95mln), **TNT's** "Raising the Bar" (3.62mln), **FX's** "Sons of Anarchy" (2.56mln) and **MTV's** "America's Best Dance Crew 1&2" (2.49mln). I excluded TNT's "Leverage" (4.99mln) because only 1 ep was included. And lastly, ad-supported cable records have been shattered this year in avg prime delivery among 18-34s, 18-49s, 25-54s and total viewers, respectively through **TBS** (635K), **USA** (1.30mln), **USA** (1.32mln) and **USA** (2.83mln). *CH*

Worth a Look: "House of Saddam," parts 3-4, Sun, 9pm, **HBO**. More exciting and better done than parts 1-2. We see Saddam's demise (although he's too sympathetic) and his son-in-laws' defection and unfortunate return. – "Secrets of the Kung Fu Temple," Thurs, 10pm, **Nat Geo**. Excellent storytelling, fascinating story about the birthplace of kung fu and how its cell-phone-toting top monk has made it into a multiplatform business. – "Crash: The Next Great Depression?" Sat, 10pm ET, **History**. Impressive nearly real-time work chronicling today's economic crisis and adds context with The Depression. *SA*

Notable: "White House Week," begins Sun, 9pm, **C-SPAN**. We saw only a 15-min sizzle reel of the doc that kicks off 6 nights of specials, but it was strong. Beyond access to the rarely seen living quarters, history is the star, recounted by the First Lady, by historians and via footage of *Harry Truman*, who gutted and rebuilt the place. His additions have brightened life for first families, a contrast to his existence there. [Note: The doc will be on demand in SD/HD in Jan.] – As the year ends so do some series, including Golden Globe nominee "Dexter" (Sun, 9pm, **Showtime**), Emmy nom-ed "Californication" (Sun, 10pm, **Showtime**) and an excellent sleeper, teen-themed "Skins" (Sun, 10pm, **BBC A**). *SA*

Basic Cable Rankings

(12/01/08-12/07/08)

Mon-Sun Prime

1	USA	2.2	2163
2	ESPN	1.9	1875
3	TNT	1.8	1735
3	FAM	1.8	1723
5	LIFE	1.7	1625
5	FOXN	1.7	1590
7	DSNY	1.6	1587
7	HALL	1.6	1353
9	TBSC	1.5	1448
10	NAN	1.4	1391
11	A&E	1.1	1030
12	TOON	1	994
12	AMC	1	989
12	HIST	1	962
12	DISC	1	937
16	FX	0.9	875
16	HGTV	0.9	866
16	SCIF	0.9	825
16	MSNB	0.9	810
16	TRU	0.9	787
21	SPK	0.8	809
21	CNN	0.8	801
21	CMDY	0.8	793
21	TLC	0.8	734
25	ESP2	0.7	725
25	FOOD	0.7	695
25	MTV	0.7	671
25	LMN	0.7	485
25	NFLN	0.7	279
30	BRAV	0.6	583
30	TVLD	0.6	554
30	BET	0.6	540
30	NOGG	0.6	437
30	NGC	0.6	390
35	VH1	0.5	519
35	HLN	0.5	498
35	EN	0.5	452
38	APL	0.4	421
38	TRAV	0.4	385
38	OXYG	0.4	328
38	SOAP	0.4	301
38	WGNA	0.4	259
38	BIO	0.4	191
44	CMT	0.3	272
44	GSN	0.3	232
44	WE	0.3	184

*Nielsen data supplied by ABC/Disney

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