

CableFAX Daily™

Tuesday — December 29, 2009

What the Industry Reads First

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High Five: Top Stories of 2009

With 2009 winding to a close, we're recapping what we believe are some of top stories of the year. From a new president to a mega deal, it was a year to remember. Our list: 1. **Comcast-NBCU** joint venture: If we had a nickel for every cable vet who told us that they never would have predicted this, well... we might have enough money to make a counter proposal for NBCU. We expect the deal to get done, and it might even take a little less time than the predicted 1 year. 2. A New **FCC**: Nothing really major has come out of the Commission yet (the pending network neutrality rulemaking has that potential), but the end of the *Kevin Martin* era had cable sounding a lot like the munchkins singing a chorus of "Ding Dong, the Witch is Dead." It sounds like there were more than a few joining the refrain at the Commission. With net neutrality, a national broadband plan and USF reform on the agenda, 2010 will give us a better feel for just how the wind is blowing and whether the *Julius Genachowski* era will be as transparent as advertised. 3. TV Everywhere: Everywhere you turned this year, it was TV Everywhere. In the end, it was Comcast who took the concept the farthest by making "Xfinity" available to the majority of its broadband subs. There's still a long way to go, so expect the amount of talk about it to at least double in 2010. 4. Everything Old is New Again: 2009 seemed to be the year for network rebrands—with **Fox** announcing that **Fox Reality** would shutter and morph into **Nat Geo Wild**. **Scripps** is following a similar recipe, announcing that it will relaunch **Fine Living** as **Cooking Channel** next year, and **Discovery** turned heads by teaming with **Hasbro** for a new kids jv that will replace **Discovery Kids**. **Discovery Health's** upcoming transformation into the **Oprah Winfrey Network** wasn't new news this year, but Oprah announcing the end of her syndicated broadcast show to devote more time to the cable net is top story worthy. We'll be watching how distributors react to these changes in 2010. 5. Cable Connection Weeks: It came, we saw and it's kind of been conquered. The debuts of a Spring Connection week anchored around the Cable Show and a Fall week that included **CTAM Summit** and **SCTE Expo** garnered mixed reviews. There were high points (less travel during economically trying times) and low points (attendance for **NAMIC's** annual conference dropped 53% YOY). In the end, it looks like some groups (like **NAMIC**) will bow out of another Connection Fall week and return to holding events in NYC in the fall. Also notable:

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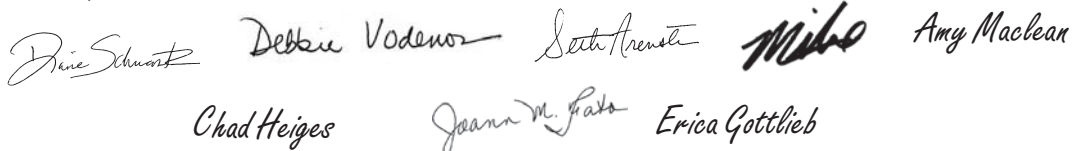
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and a special thank you to our loyal readers!

Here's to a successful 2010

Sincerely,



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Fox-Time Warner Cable (seeing as TWC may lose O&Os and cable nets Jan 1, this may be a top 2010 story), **Sinclair-Mediacom** (here we go again), **AETN-Lifetime** merger (10 cable nets under one roof is pretty powerful), **Cable Positive's** dissolution (we still get teary about it), the death of *Bill Bresnan* (he was a legend) and **Disney-Marvel** (this \$4bln acquisition has us on the lookout for a whole new Disney).

Retrans: In DC Mon, **Mediacom** and **Sinclair** began mediation in an effort to settle their retrans dispute, according to the MSO, which has been championing the step for some time. The pair traded deal offers recently (*Cfax*, 12/23), but none was deemed mutually acceptable.

Carriage: **Charter** agreed to launch **Big Ten Net** next week on its digital basic tier in St. Louis and Southern IL. -- **Buckeye CableSystem** launched **WealthTV** in HD in Toledo and Sandusky, OH. -- **Comcast** and **MASN** reached a settlement regarding outstanding legal disputes dating back to Aug '08 and dealing primarily with the net's claim that Comcast denied it carriage in certain markets to promote Comcast SportsNet. The settlement discontinues pending legal actions before the FCC, which dismissed MASN's program access complaints against the MSO. While Comcast said it's pleased with the agreement, MASN attorney *David Frederick* said: "This amicable resolution is good news for MASN, for Comcast, and most importantly for sports fans, who will get to see Nationals and Orioles games on a nightly basis as early as 2010." The parties declined to offer carriage specifics.

Slopeside Seat: **NBCU** is ready to serve up more than 1,000 hours of live streaming coverage from the Vancouver Olympics at NBCOlympics.com, but **MediaPost.com** reports that access to the content will be limited to pay-TV subs. TV Everywhere-type authentication will be required at the site, according to MediaPost, and partners include **Time Warner Cable**, **Comcast**, **DirectTV** and **Verizon**. Dubbed Olympics Online Connect, the offering is said at TimeWarnerCable.com to also feature full-event replays and high-def availability. Access requirements, per the MSO's site, include a TWC expanded basic or higher level service and registration at NBCOlympics.com, which will prompt customers to establish a user name and password. NBCU and Time Warner Cable couldn't be reached for comment by our deadline.

In the States: A new **Clear** promo features lifetime pricing covering a 2-play bundle of home and mobile Internet service for \$50/month. The fee remains static as long as customers remain on the same plan. -- **Sinclair** tapped **Rentrak** for local market HH viewing data covering 7 total stations in Columbus, Milwaukee, San Antonio and St. Louis. -- A partnership including **Sovernet Comm** and 12 independent rural NY telcos received a \$40mln federal broadband stimulus grant to build a 1,300-mile broadband fiber network for underserved communities in upstate NY and parts of VT and PA.

Ratings: To go along with its 6th consecutive year of growth among 18-49s and 25-54s, **A&E** notched its best year ever in '09 among all key demos, including 18-49s (671K), 25-54s (703K) and total viewers (1.4mln). -- **Oxygen** recorded its most-watched year ever in '09 through delivery among women 18-34 (87K), 18-34s (112K) women 18-49 (168K), 18-49s (224K) and total viewers (424K). Also, **Oxygen.com** notched its best year ever in page views and monthly visitors. -- **Comcast SportsNet Chicago's** Dec 23 Blackhawks telecast earned a 3.27 HH rating to become the net's highest-rated regular season team game ever.

Programming: **Outdoor Channel's** 1Q programming slate features 7 new shows, including "Alaskan" (Jan), a doc series chronicling the city of Nome, "World Class Bowhunting" (Jan 3) and "S.W.A.T. Magazine TV" (Wed). -- **Versus'** "NHL Winter Classic Eve" (Thurs, 11pm ET) previews the New Year's Day outdoor hockey matchup featuring the Bruins and Flyers at Fenway Park.

Research: Global shipments of in-car TV systems, including embedded and portable solutions, will double from '09-'15, according to **iSuppli**, to more than 17mln units. The future of mobile TV services will likely be shaped by new mobile TV broadcast standards rather than IP-based video services, said the firm. Vehicle TV service **AT&T CruiseCast** currently features 22 channels, including **Disney Channel**, **USA**, **CNBC** and **Comedy Central**.

People: **Cablevision** inked pres/CEO *James Dolan* to a new employment agreement that runs through Dec 31 '14 and calls for an annual pay of \$1.5mln, plus an additional \$500K/yr for his future role as exec chmn, **MSG**, which is slated for a spin off from Cablevision early next year. COO *Tom Rutledge* also signed on through Dec 31 '14, at a min base salary of \$1.64mln, and vice chmn *Hank Ratner* remains through the same date at a min base of \$500K, while his imminent post as pres/CEO, **MSG** will pay him a min annual base of \$1.2mln. All the posts

BUSINESS & FINANCE

carry an annual target bonus equal to 200% of the respective annual base salaries. -- **Liberty Media** locked up pres/CEO *Greg Maffei* through '14 with an annual base salary of \$1.5mIn, increasing annually by 5%, and an annual target cash bonus equal to 200% of the applicable annual base.

Business/Finance: Scripps Nets completed its sale of **uSwitch.com**, a UK-based online energy price comparison and switching service, to **Forward Internet Group**. Terms weren't disclosed.

Editor's Note: As the year draws to a close and all those holiday calories start to pile up, let's not forget the best way to burn them off: Entering early for the much-anticipated **CableFAXIES Awards**, whose winners will be revealed at our Apr event next year. OK. Perhaps that's not the best way to burn off calories, but at least you can save yourself some last-minute hassles by entering well ahead of the Feb 5 deadline (late deadline: Feb 12). Go to <http://www.cablefax.com/cfp/awards/cablefaxies2010/> to download an entry form and find out more information on award specifics and categories. Also, don't forget to bone up on social media strategies before the new year by downloading our recent CableFAX Webinar on demand. More info at http://www.cablefax.com/cfp/webinars/social_media_dec15.html.

CableFAX Daily Stockwatch

Company	12/28 Close	1-Day Ch	Company	12/28 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	36.05	0.27	AMPHENOL:	45.90	(0.71)
DIRECTV:	33.94	(0.03)	AOL:	23.86	(0.48)
DISH:	20.82	(0.12)	APPLE:	211.61	2.57
DISNEY:	31.91	(0.38)	ARRIS GROUP:	11.35	(0.05)
GE:	15.34	(0.1)	AVID TECH:	12.79	(0.1)
NEWS CORP:	15.88	0.02	BIGBAND:	3.38	0.07
MSOS					
CABLEVISION:	26.01	(0.09)	BLNDER TONGUE:	1.13	(0.01)
COMCAST:	17.07	(0.1)	BROADCOM:	31.62	(0.57)
COMCAST SPCL:	16.20	(0.11)	CISCO:	24.08	0.12
GCI:	6.76	0.09	CLEARWIRE:	6.92	0.11
KNOWLOGY:	11.20	(0.16)	COMMSCOPE:	26.94	(0.43)
LIBERTY CAPITAL:	23.85	(0.06)	CONCURRENT:	3.94	0.10
LIBERTY GLOBAL:	21.78	(0.15)	CONVERGYS:	11.25	(0.02)
LIBERTY INT:	11.05	0.11	CSG SYSTEMS:	19.43	0.18
MEDIACOM:	4.42	(0.12)	ECHOSTAR:	19.72	0.02
RCN:	11.05	0.27	GOOGLE:	622.87	4.39
SHAW COMM:	20.68	0.18	HARMONIC:	6.32	0.08
TIME WARNER CABLE:	41.69	(0.15)	INTEL:	20.30	(0.03)
VIRGIN MEDIA:	17.46	(0.17)	JDSU:	8.38	(0.13)
WASH POST:	445.00	(0.71)	LEVEL 3:	1.50	(0.02)
PROGRAMMING					
CBS:	13.85	(0.03)	MICROSOFT:	31.17	0.17
CROWN:	1.31	(0.04)	MOTOROLA:	7.84	(0.14)
DISCOVERY:	31.05	(0.07)	OPENTV:	1.40	0.02
GRUPO TELEVISIA:	20.87	(0.1)	PHILIPS:	29.59	0.09
HSN:	20.38	(0.16)	RENTRAK:	17.98	(0.14)
INTERACTIVE CORP:	20.33	0.54	SEACHANGE:	6.58	0.03
LIBERTY:	36.46	(0.14)	SONY:	29.58	0.27
LIBERTY STARZ:	46.69	(0.4)	SPRINT NEXTEL:	3.65	(0.08)
LIONSGATE:	5.77	(0.02)	THOMAS & BETTS:	36.37	0.40
LODGENET:	5.45	(0.08)	TIVO:	9.96	(0.04)
NEW FRONTIER:	1.87	0.03	TOLLGRADE:	6.07	(0.04)
OUTDOOR:	5.50	(0.1)	UNIVERSAL ELEC:	23.49	0.28
PLAYBOY:	3.26	0.01	VONAGE:	1.38	(0.04)
RHI:	0.31	(0.09)	YAHOO:	16.88	0.16
SCRIPPS INT:	41.56	(0.21)	TELCOS		
TIME WARNER:	29.23	(0.05)	AT&T:	28.33	0.23
VALUEVISION:	4.80	0.03	QWEST:	4.31	0.00
VIACOM:	31.32	(0.03)	VERIZON:	33.49	0.13
WWE:	15.28	(0.12)	MARKET INDICES		
TECHNOLOGY					
3COM:	7.55	0.04	DOW:	10547.08	26.98
ADC:	6.49	(0.06)	NASDAQ:	2291.08	5.39
ADVANTAGE:	1.99	(0.01)			
ALCATEL LUCENT:	3.26	(0.04)			
AMDOCS:	28.78	(0.1)			



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