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Monday — October 15, 2012

What the Industry Reads First

Volume 23 / No. 199

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CTAM Summit: TVE Marketing Hinges on Education, Education, Education

Panelists at **CTAM Summit** Sun seemed to agree on one thing: the #1 priority in TV Everywhere marketing remains consumer education. And they said raising consumer awareness is key. It's all about "explaining [TVE] in a very simple way," said *Ronald Lamprecht*, **NBCU** evp, business development and sales. Despite NBCU's success at the London Olympics, he said the reality is "it's still hard to break through and get people to understand the benefits." Consumers also don't quite get the nuances (e.g. sometimes certain eps aren't available immediately), and "we are having a hard time explaining that," said *David Purdy*, content svp with **Rogers Comm**. After integration comes maintenance, said *Jeff Dallesandro*, **HBO** vp, digital domestic network distribution. "[If] your streaming doesn't work, your brand takes a hit... It's the ongoing commitment" to every platform, he said. Despite the obstacles, panelists are optimistic. "The learning curve will be challenging but we will get there for sure," Purdy said, citing long-term ROI benefits. People will still watch traditional TV, but advertisers are turning to digital content, he said. From an ad perspective, TVE is about protecting the traditional TV business model in the long run, said *Frans Vermeulen*, **FreeWheel** svp, revenue and strategy. Meanwhile, there's no consensus on whether the industry as a whole should collaborate on TVE. Though it makes sense to combine resources, it's hard to juggle with different players, measurements and markets, Lamprecht said. Purdy said it's critical for the industry to work together on common approach.

CTAM Notebook: Social TV, or engaging with television content on social platforms, starts with the community, according to **Cox** exec dir, mktg-social media *Adam Naide* at a panel at the **CTAM Summit**. But it's crucial to promote the content—like exclusive extras for social followers or free gifts for fans—in a way that generates conversation. In other words, it's not the place for "shameless plugs and promotions," he said. Cox uses the @CoxTV twitter handle to host conversations about popular shows like "Homeland," "The Walking Dead" and "Dallas." "As an operator, we really trying to promote this cross-channel content," he said, via platforms like **Facebook**, **YouTube** and **Pinterest**. For instance, when "Dallas" relaunched on TNT after a 20-year hiatus, Cox partnered with the net to create a Facebook game that allowed people to cast their friends as characters. The show generated 3mln Facebook fans from the initiative, and a whopping 7mln people tuned in for the first episode. But commerce factors into Cox's strategy, too. "It's about driving

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demand for VOD, pay-per-view and ultimately the value of video product,” he said. Something he’s learned about social media around live events, like PPV boxing matches, is that the “conversation is in real time.” To capitalize on that, Cox offered access to exclusive content via social feeds and free gifts (such as a pair of boxing gloves), but it also promoted the buy—with measurable success. They saw a 10-20% increase in lift within markets that ran the promotion compared to those that didn’t. A recent development for Cox is hosting “Cox Watch Parties” around scripted TV content, the first of which occurs Sun night during **AMC’s** “The Walking Dead” premiere. The MSO will host a conversation and give away prizes provided by AMC. It has also purchased **Twitter** media, according to Naide. -- Sean Besser, evp, business development, partnership and strategy, **GetGlue**, cited a study suggesting that 9 out of 10 shows on cable will generate more social activity on GetGlue than Twitter. Besser’s point (beyond plugging his own product) was that the industry as a whole should think about new venues beyond what currently exists. He warned against merely having “Twitter and Facebook checkboxes” and said it’s important “to think about where the viewers are. It’s all about curating an experience that’s meaningful to people.” **Meghann Sills Elrhoul**, **Trendrr** vp, client services & analytics, said the social TV audience has exploded, citing a 275% CAGR in 2012 alone. As for **Zeebox’s** 2nd screen TV companion app, just launched in the U.S., Naide said it is likely to be hot for the moment, but “you only get the most value when your friends are on it too.” Besser called it “so tech heavy” and potentially too difficult for average users. Trendrr’s Sills Elrhoul said “there’s no distinct technology that sets it apart... They’re trying to do too much.” More important is concentrating “on one distinct driver, to be more focused and so more distinct in the marketplace.” So does social actually drive ratings? Though we’ve heard plenty of marketers claim the contrary, Cox’s Naide said no. “It doesn’t drive tune in, it drives conversation,” he said. But generating buzz and building a relationship with your consumers through discerning their TV viewing habits is significant. “An engaged customer is basically table stakes for building that relationship,” he said, and that personalization creates opportunities for upgrading.

VOD: In Demand predicts “The Hunger Games” Movies on Demand premiere weekend (Aug 18, day and date with its DVD release) will mark 1 of the best opening weekends ever for the service in terms of buys and revenue. Other summer highlights: **Comic-Con**-themed marketing resulted in an increase in buys of more than 29% over last year for non-Batman titles. “The Dark Knight Rises” helped Batman titles increase nearly 340% over last year. “Steve Harvey’s Grand Stand-Up Finale,” which aired on both PPV and VOD starting on August 2, was the most successful non-ring sports event in the last 5 years and ranks as the most successful “concert-type” event in over 10 years.

Deals: Providence Equity Partners reportedly sold its 10% stake in **Hulu** back to the company for \$200mln, **Techcrunch** reported, citing people familiar with the matter. The buyout has long been expected, with Providence having

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Pinning Down Pinterest: If you're not using **Pinterest**, you may be missing out. The social media site drives more sales than **Facebook**, according to *Shelly Kurtz*, exec dir of affil sales & marketing for **International Media Distribution**. With the average Pinterest user having 331 followers and more than 2400 pins, Kurtz believes there may be an opportunity to embed/target promotion tastefully into pins/boards, including leveraging it to drive consumers to transactional VOD services. **HGTV** ranks as one of the most popular brands on Pinterest, according to **Zoom-sphere** stats. It's mainly using the site to drive traffic to its Websites. *Jillian St Charles*, vp of **HGTV.com** and **HGTV-Gardens.com**, recommends pinning content that can stand on its own, outside of the brand. Check out an archive of **CableFAX's** Webinar on Pinterest and cable, which includes insight from **Cox** exec dir, social media *Adam Naide* and **WE's** vp, digital media & biz dev *Andrea Bell Macey* at http://www.cablefax.com/cfp/webinars/2012_June27/

CTAM Mark Awards: **CTAM** celebrated the Mark Award winners at a reception during Summit. There were 192 winners: 79 gold, 75 silver and 38 bronze. **USA/NBCU** was presented with the "Top of the Mark" award for Characters Unite Month. The effort garnered 440mln earned media impressions, a 74% increase in Facebook fans, and changed the lives of participating students, who said the program was the "best week of their lives." **CTAM's** "Most Innovative" award went to **Cinemax** for "Strike Back SuperWall," which raised awareness for the net's 1st-ever original series, "Strike Back."

Q&A with RLTV pres/CEO Paul FitzPatrick: **RLTV is undergoing a rebrand. Can you explain what that entails?** It really goes to the look, feel, messaging, graphics. When the service was launched as a full-time channel in '08, it was launched as Retirement Living TV. The origins of that stem from John Erickson's 30-plus years in the retirement communities business. One of unintended consequences of the name given that the mandate is 50+, it tended to put in a box that the audience was really retirees and the older segment. The 50+ audience is 100mln strong, and in the next 3 years 50% of the adult population in the country is going to be over 50. We came to the conclusion that the retention of the acronym RLTV was important. Also important is that retiring is certainly part of the journey people are going on, but something fundamental has been taking place in how Boomers see the 2nd half of that journey. So, how do we effectively communicate RLTV and not have it mean what it previously meant: retirement? There are many different R-words associated with this journey: redefining, reimagining, rethinking, etc. Our communication process is through imagery and content to execute on redefining that "R." The tagline being used is "Life Redefined." **You recently announced John Ford is consulting with RLTV. Does that mean big programming changes are ahead?** It's not that there are big changes per se because the fundamentals are there, but we have stepped up very significantly our investment in original content. There is a very significant investment in our verticals: relationships, transformation, finance, health and wellness, issues and engaging—ie, politics, as well as exploration, which could be travel. We want to make sure we bring in highly experienced people such as John so that as we make these investments, we're making them with a disciplined, scheduled logic as well as a variety of other considerations. What you'll see starting in the 4Q of this year and accelerating as we move into 2013 is a programming schedule that's reflective of scheduling strategy, tune-in, awareness, building length of view, and that's where John has been enormously helpful. **Distribution goals?** We're now in the marketplace communicating with 100-200 new advertisers and marketers that we hadn't spoken to previously or had spoken to previously when it was the old brand. The distribution story, the programming investment story, the advertising story, the rebrand is all taking place in parallel. As a result, what we're hearing from advertisers and distributors is that this is a brand and programming concept that is aptly resonating, and will translate into numbers we'll be happy to share with you not too far down the road. **[Time Warner Cable and Bright House have committed to launching the channel on digital by year-end (Cfax, 10/12)] Biggest misconception of the 50+ demo?** That they're stuck in their ways, and once they grab hold of a brand, they're not willing to change.

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CableFAX Week in Review

Company	Ticker	10/12 Close	1-Week % Chg	YTD %Chg
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BROADCASTERS/DBS/MMDS

DIRECTV:	DTV	49.84	(6.17%)	16.56%
DISH:	DISH	33.39	3.95%	17.24%
DISNEY:	DIS	50.59	(4.49%)	34.91%
GE:	GE	22.48	(2.77%)	25.52%
NEWS CORP:	NWS	24.58	(3.53%)	35.20%

MSOS

CABLEVISION:	CVC	16.91	(0.29%)	18.92%
CHARTER:	CHTR	76.13	(0.52%)	33.70%
COMCAST:	CMCSA	35.78	(2.08%)	50.91%
COMCAST SPCL:	CMCSK	34.93	(1.49%)	48.26%
GCI:	GNCMA	9.45	(7.98%)	(3.47%)
LIBERTY GLOBAL:	LBTYA	60.86	(1.25%)	48.33%
LIBERTY INT:	LINTA	19.48	3.29%	20.10%
SHAW COMM:	SJR	20.65	0.73%	6.61%
TIME WARNER CABLE:	TWC	96.86	(2.41%)	52.37%
VIRGIN MEDIA:	VMED	30.71	(0.07%)	43.64%
WASH POST:	WPO	359.49	(1.79%)	(4.6%)

PROGRAMMING

AMC NETWORKS:	AMCX	41.46	(3.87%)	10.32%
CBS:	CBS	33.77	(7.45%)	24.43%
CROWN:	CRWN	1.69	2.42%	39.67%
DISCOVERY:	DISCA	60.74	(0.83%)	48.25%
GRUPO TELEvisa:	TV	23.87	0.34%	13.34%
HSN:	HSNI	47.75	(2.39%)	31.69%
INTERACTIVE CORP:	IACI	53.55	(0.69%)	25.70%
LIONSGATE:	LGF	15.10	(3.33%)	81.49%
LODGENET:	LNET	0.60	(18.92%)	(74.9%)
NEW FRONTIER:	NOOF	1.33	0.00%	29.13%
OUTDOOR:	OUTD	7.34	0.14%	(1.61%)
SCRIPPS INT:	SNI	62.52	(1.56%)	47.38%
TIME WARNER:	TWX	45.06	(2.43%)	24.68%
VALUEVISION:	VVTV	2.55	11.84%	35.64%
VIACOM:	VIA	54.92	(2.57%)	2.98%
WWE:	WWE	8.22	(0.36%)	(11.8%)

TECHNOLOGY

ADVANTAGE:	AEY	2.06	(1.9%)	(1.9%)
ALCATEL LUCENT:	ALU	1.00	(3.85%)	(35.9%)
AMDOCS:	DOX	32.20	(1.83%)	12.86%
AMPHENOL:	APH	58.57	(0.32%)	29.04%
AOL:	AOL	36.77	0.05%	143.51%
APPLE:	AAPL	629.71	(3.51%)	55.48%
ARRIS GROUP:	ARRS	12.58	(1.64%)	16.27%
AVID TECH:	AVID	8.87	(7.7%)	3.99%
BROADCOM:	BRCM	32.90	(9.19%)	12.06%
CISCO:	CSCO	18.41	(2.41%)	1.80%
CLEARWIRE:	CLWR	2.32	71.85%	19.59%
CONCURRENT:	CCUR	5.02	11.80%	32.45%
CONVERGYS:	CVG	15.78	(1.62%)	23.57%
CSG SYSTEMS:	CSGS	21.72	(4.57%)	47.65%
ECHOSTAR:	SATS	30.87	3.87%	47.42%
GOOGLE:	GOOG	744.75	(2.98%)	15.30%
HARMONIC:	HLIT	4.38	(3.31%)	(13.1%)
INTEL:	INTC	21.48	(5.29%)	(11.42%)
JDSU:	JDSU	10.30	(9.33%)	(1.34%)

Company	Ticker	10/12 Close	1-Week % Chg	YTD %Chg
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LEVEL 3:	LVLT	21.61	(4.8%)	27.19%
MICROSOFT:	MSFT	29.20	(2.18%)	12.48%
RENTRAK:	RENT	16.92	(0.06%)	18.49%
SEACHANGE:	SEAC	8.30	(0.24%)	18.07%
SONY:	SNE	11.36	(5.33%)	(37.03%)
SPRINT NEXTEL:	S	5.73	3.80%	144.87%
TIVO:	TIVO	9.94	(3.59%)	10.81%
UNIVERSAL ELEC:	UEIC	17.62	(7.99%)	4.45%
VONAGE:	VG	2.26	(2.16%)	(7.76%)
YAHOO:	YHOO	15.88	(1.31%)	(1.55%)

TELCOS

AT&T:	T	35.63	(5.89%)	17.82%
VERIZON:	VZ	44.62	(5.16%)	11.22%

MARKET INDICES

DOW:	DJI	13328.85	(2.07%)	9.10%
NASDAQ:	IXIC	3044.11	(2.94%)	16.85%
S&P 500:	GSPC	1428.59	(2.21%)	13.60%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. CLEARWIRE:	2.32	71.85%
2. BLNDER TONGUE:	1.14	13.20%
3. VALUEVISION:	2.55	11.84%
4. CONCURRENT:	5.02	11.80%
5. DISH:	33.39	3.95%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. LODGENET:	0.60	(18.92%)
2. JDSU:	10.30	(9.33%)
3. BROADCOM:	32.90	(9.19%)
4. UNIVERSAL ELEC:	17.62	(7.99%)
5. GCI:	9.45	(7.98%)

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