

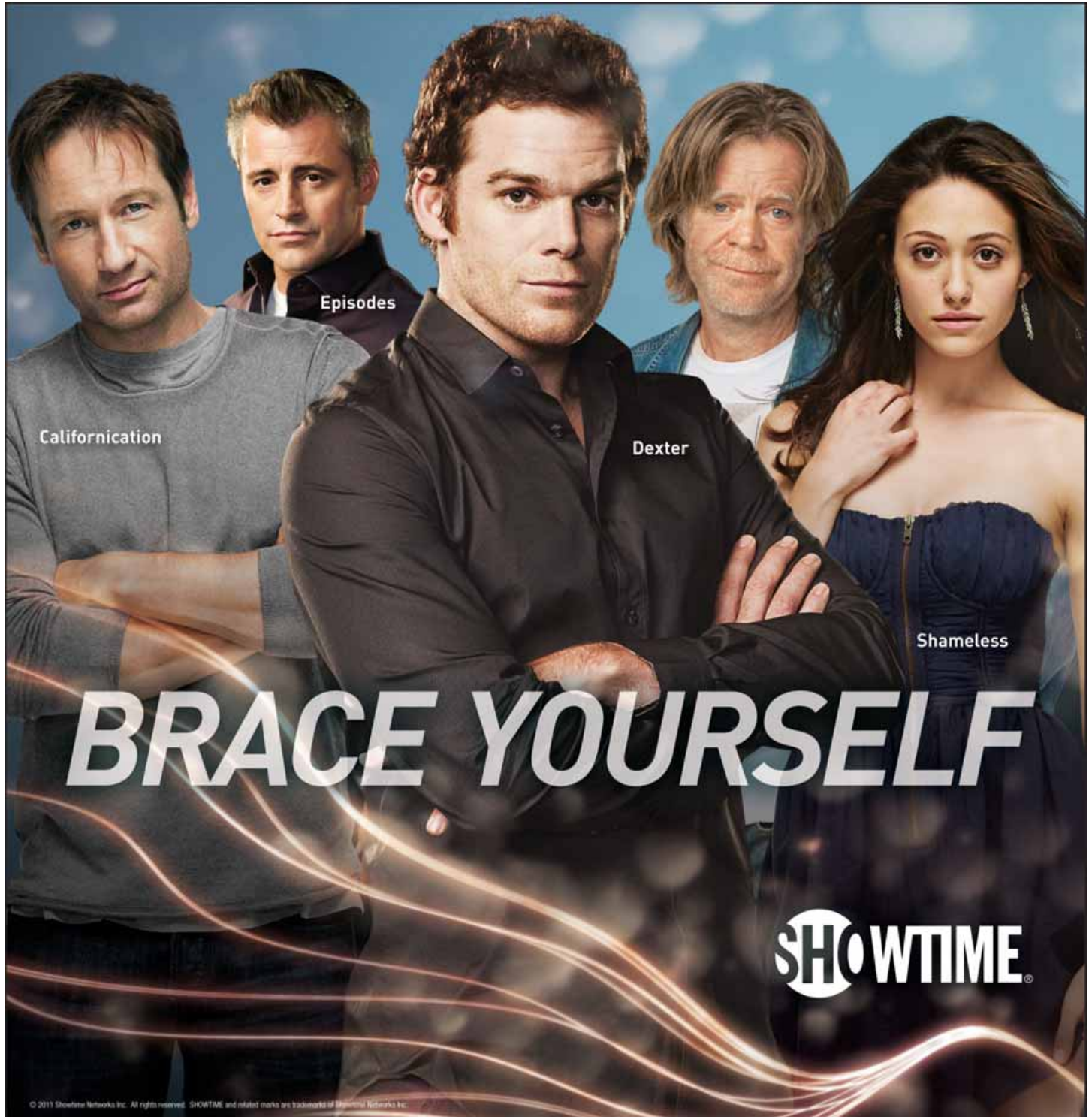
# CableFAX Daily™

Wednesday — June 15, 2011

What the Industry Reads First

Volume 22 / No. 114

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## Cheer Up, Cable: Execs Admit Challenges But Tout Cable's Position

OTT. Content rights squabbles. **Netflix**. As top cable execs recounted myriad challenges in a multiplatform world at the **Cable Show Tues**, **Time Warner** chmn/CEO *Jeff Bewkes* leaned forward into the opening general session audience, paused a moment and smirked. "Let's all cheer up," he said in his typically calm tone. "This is not the music industry. This is the cable industry." Operators and programmers are responding to the market, he said, and cable's in one of the best positions to profit from changing consumer attitudes. "It's morning in the cable industry," he said. "Think about what we have all built together over the last 30 years." He said devices like the iPad and smartphones are a gift. "They're bringing us the tools," he said. "We should be really happy and excited about where we are now." Bewkes optimism infected the panel, but moderator *Liz Claman* of **Fox Business Net** wasn't about to let execs gloss over the difficulties that remain. Those include testy negotiations over content rights, windowing and business rules on multiple platforms. "We've been talking about authentication for two years, and we're still talking," noted **News Corp** dep chmn, pres/CEO *Chase Carey*, arguing that distributors and content owners must speed up their efforts. Comcast Cable pres *Neil Smit* said that despite questions over ultimate rules, the first concern should be "meeting consumers' demands... In terms of people wanting to get paid, I think there are different currencies." He noted offers to disable fast-forwarding or work on a better ratings system for VOD content. "The more we work within the ecosystem, the better," he said. Indeed, **Via-com** pres/CEO *Philippe Dauman* said "one of the true obstacles" to getting everything into an authenticated environment is that Nielsen isn't yet measuring it—a must before ad-supported nets can get fully behind TV Everywhere and make more available. That—along with distributors and content owners working out business rules—could lead to a "new era" for cable. Said **Time Warner Cable** chmn/CEO *Glenn Britt*: "The key for all of us is to keep changing with the technology... We all have technical people who understand it. And we understand consumers. We need to match our understanding of consumers with our understanding of technology." Saying the industry should learn from **Apple** and its focus on usability and aesthetics, Bewkes suggested more industrywide coordination to adopt "best-of-class interfaces" that work across many cable systems. "The interface is really the key," he said. **Cox** pres *Pat Esser* noted the



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irony that “we created this chaos” by building out broadband that enables high-quality video that rivals linear TV, but “at the end of the day, you have to go back to the consumer and ask them what they value and what they don’t value. In some cases, you’re not going to control everything.”

**Speed Demon: Cablevision** significantly hiked the speed of its Optimum WiFi network to 15Mbps downstream/4Mbps upstream from 3Mbps/1.5Mbps. Big win for the more than 500K CVC subs who have used the service. The downstream speed now matches Cablevision’s entry level wired residential/business broadband service. “This is a huge enhancement for our customers and a significant step forward for mobile online access. With this increase, Optimum WiFi not only blows away 3G and 4G cellular data speeds, it’s three times faster than the average wired residential broadband service across the country,” said *Kevin Curran*, Cablevision’s svp of wireless product management.

**On the Hill: House Commerce** member *Doris Matsui* (D-CA) introduced legislation aimed at making broadband more affordable to lower-income families. It directs the **FCC** to create a Broadband Lifeline Assistance Program using the USF’s Lifeline Assistance Program. She introduced similar legislation in ’09 that was included as a recommendation in the FCC’s National Broadband Plan. **NCTA** head *Michael Powell* applauded Matsui for reintroducing the legislation, saying the assoc looks forward to working with her and other members on new ideas that will improve digital literacy and help low-income HHs realize the benefits of broadband.

**NCTC Chief:** Industry vet *Rich Fickle* was tapped as pres/CEO of **NCTC**. He replaces *Jeff Abbas*, who left the co-op in Mar after 6 years as its leader. Fickle joined **Ascent Media** in ’01 and served most recently as svp, cable/telco VOD and TVE services for **Deluxe Ent**, which acquired Ascent in Jan. He had previous stints at **AT&T Broadband** and **Headend in the Sky**. Fickle starts his new gig July 5, in plenty of time for the upcoming **Independent Show** in San Fran (July 24-27). “NCTC plays a critical role for many members and I am excited to be part of helping build even more value for the industry in the years to come,” Fickle said. “I believe there are many opportunities for NCTC to work collaboratively with suppliers and members helping to drive value for all companies as we all face key challenges in the industry.”

**Mr President:** In his first industry address as **NCTA** pres/CEO, *Michael Powell* declined to repeat his summersault entrance from a decade ago when he was **FCC** chmn (“I’m not going to engage in any gymnastics,” quipped the older, wiser Powell. “I might break a hip.”) Powell said that while the Internet taught us that “a bit is a bit,” new devices like the iPad are teaching us that “glass is glass.” He cited “challenging issues” for the industry as he takes the reins in D.C., with “more ambiguity and more anxiety as the familiar morphs into more unfamiliar terrain... We will have to be ever vigilant... We will need to take a lead role in educating policy leaders and ourselves... a good defense, in

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short, is a good offense." -- In a short welcome, Chicago mayor *Rahm Emanuel* said cable's broadband infrastructure is "essential to the economy I want to build" in Chicago, and he thanked **Comcast** for its "Internet Essentials" initiative to help bring broadband to low-income families in Chicago (*Cfax*, 6/1).

**Show Notebook:** Just what will **Comcast's** *Brian Roberts* be demoing at the **Cable Show** Thurs morning? The MSO's next-generation Xfinity TV experience, which includes a new guide and user interface to make the TV screen more interactive, personal and social. Now available in market trial in Augusta, GA, the intuitive search lets users find what they want to watch in seconds. Other components include interactive apps, like traffic and weather, and social apps like **Facebook** that let users share and discover what to watch with their friends. Comcast is using hybrid set-tops with true2way and IP capability from **Pace**, as well as Intel architecture and **thePlatform's** cloud-based content mgmt infrastructure. -- When it comes to IPv6, the bottom line is that the transition needed to start yesterday. That was the consensus at a trio of IPv6 discussions sponsored by **Arris** at the Cable Show. **American Registry for Internet Numbers** pres/CEO *John Curran* suggested vendors integrate IPv6 into product cycles ASAP, ahead of customer demand. "It will be a competitive advantage and a business differentiator," he said. He also suggested the government needs to adopt regulatory and economic incentives to encourage IPv6 adoption, and that it require IPv6 compatibility in all procurement procedures. -- Cable's ad gurus predicted that advanced advertising could expand the industry's client base and revenues as ops and programmers educate brands on new interactive avenues—where cable has an advantage over competitors. "A lot of our customers are somewhat caught in a state of confusion on what's going on, and they end up in a state of paralysis," said **Cox Media** svp *Billy Farina*. He said cable must make the case that advanced advertising involves unique capabilities and price it accordingly. **Rainbow Ad Sales** pres/COO *David Kline* said he's already seen a willingness to pay more. "I don't think there's any question that they're willing to pay for it," he said. The idea is to gradually add interactive features the 30-sec ad that brands already understand. "You get them started, and you get them the results they're expecting," he said. "Once you do that, and you over-deliver on your promise, you'll keep them coming back... You're going to get rewarded with more volume and higher pricing." **Time Warner Cable Media Sales** evp/pres *Joan Gillman* said "having the products in our portfolio is changing the conversation with our clients," and that "the relationship is only going to get deeper" as cable continues to roll out "a fully integrated, cross platform solution." **Comcast Spotlight** pres *Charlie Thurston* said the key is to woo big ad sectors like pharma and financial, whose buy-in on advanced ads could be "game changers." -- Cable is looking to elevate its share of political ad spending. "Broadcasters are playing hard in 2012. And we will take it from them. This is our space," said *Chuck Cowdrey*, vp, political strategy for **NCC Media**. Cable has done a half billion dollars in business from politics, he said. "And rumor has it Obama wants to raise \$1 billion for his 2012 campaign." How will cable operators manage the influx of political advertising, which it must balance with regular demand? "The preparation begins the day after the election. You need to know the races, the top players, all the basics," said **Cox Media** vp, national sales *Brian Davis*.

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**5Qs with Turner Network Sales COO Coleman Breland: On TV Everywhere (TVE), the technology seems settled more or less, but the sticking point is rights. Correct?** Yes, I think so. Dickens was right, 'It's the best of times, it's the worst of times.' There are so many moving pieces in the universe now. You have devices, content, brands, distributors and consumers, who are generating all these new experiences and behaviors. So we're in this massive creative collision. On the other side we have to figure out how to move quickly enough to respond and have the rights and understand the risk and opportunity and revenue impact of all those devices. But it's the best of times because we as a collective industry are listening to consumers more and this has made us better. As a marketer you have to love the fact that viewers can experience your content on many devices. **So this is why you've been out front on TVE?** Yes. It's why we've aggressively pursued the rights that we need to distribute content on as many platforms as possible. It's absolutely been a top priority for us. **Does this creative collision make you long for the old days?** Well, it was such an easy business years ago. It used to be distribution's job to say, 'OK, we're going to launch a network. Here's how we're going to program it, here's how we're going to brand it. This is what we need in license fees.' Then you'd go out and secure deals for as many viewers as possible. Now you have to add to that how to get networks for as many devices as possible on an authenticated basis. **But you're happy with TVE's progress?** Yes. By our estimates by the end of second Q we should have 70mln HHs and you're seeing a lot of participation now with Viacom and Fox and others. People see it as a good idea, a way to reward the customer. We believe in it. That's why we've been so aggressive on rights. **What's the worst of times?** Sub growth hasn't been anything to write home about. And that's driven by something else that makes it the worst of times and that's the economy and housing pressures.

**Carriage: Outdoor Channel HD** hit the 10mln home mark, notching a 34% YOY increase in its HD service. The net will be added to **Comcast's** Digital Preferred tier in Greater Chicago in Aug in addition to maintaining its existing position on the Sports & Ent tier.

**5Qs with Bravo pres Francis Berwick: Before we get into this interview, we have to ask: How does it feel to have single handedly resurrected Kathy Griffin's career?** [LAUGHS] Number one, I can't claim that was single handed. It was a whole team of people. I really think she's inordinately talented... The fantastic thing for us is that I remember when we started D-List and we showed her at a comedy club in New York performing at a 200-seater, and it wasn't full. And now to see her pack these 5,000-seaters... it's amazing. **In 2010, despite the tough economy, you got 150 new advertisers, and you saw 45% growth on the digital side. Does this mean advertising is coming back or do you still see some dark spots or challenges?** From our point of view, we're not feeling the dark spots. We've been doing incredibly well. It's really about the fact that we really target a particular audience, and that audience is very passionate about our brand and our shows to the point where we're able to push the engagement between platforms. They're talking to our talent on Twitter during the show, and they keep watching during the commercials. **Your transmedia initiative with "Top Chef" has taken multiplatform engagement to the extreme, even integrating it with the competition itself? Is this the wave of the future or just a one-off?** I think it's the wave of the future. The incredible thing is that the more platforms the

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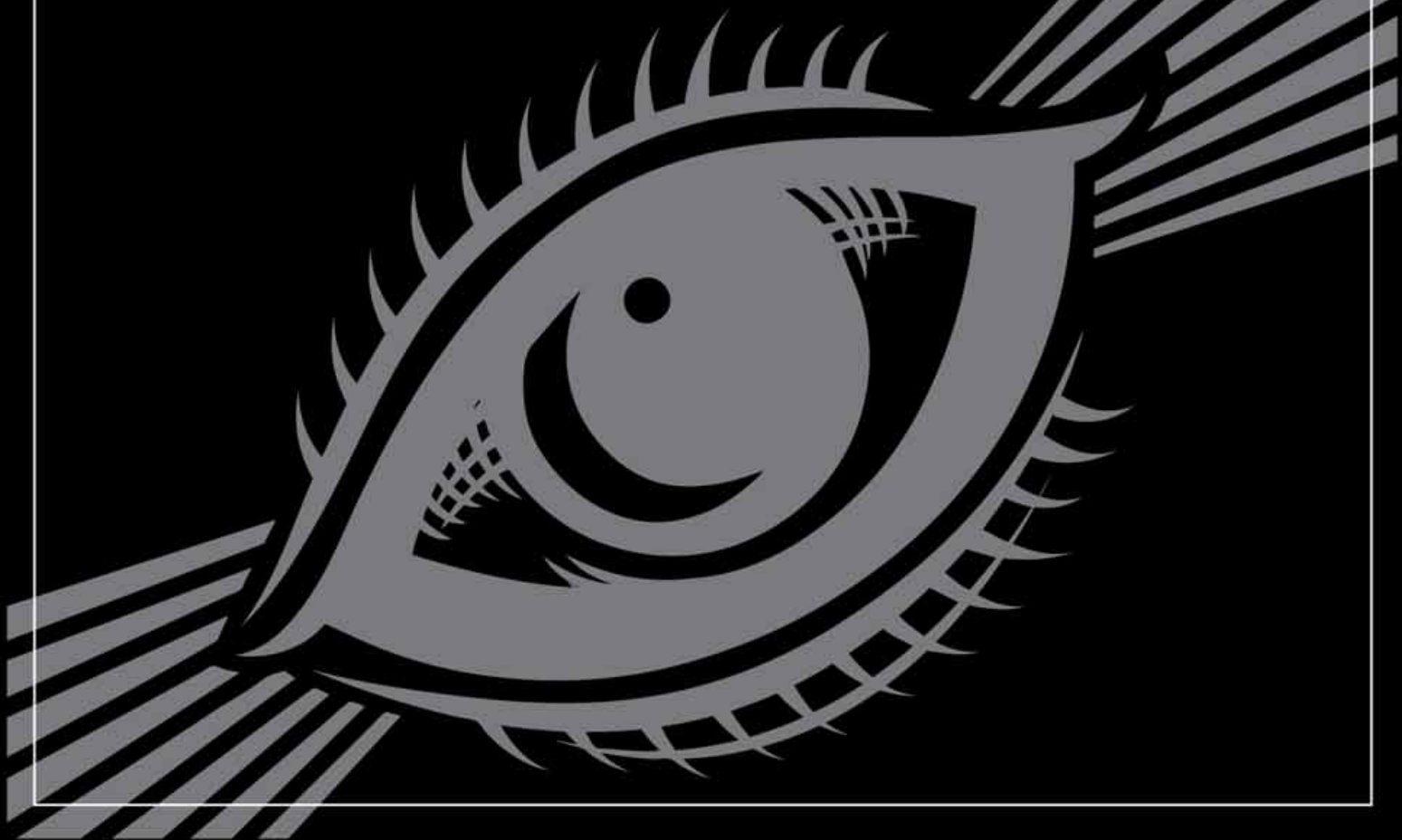
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advertiser and the show is on, the better the recall, the better the opinion lift, at least in our environment. With Top Chef, we're holding an ongoing, parallel contest that's going back and forth between the two platforms... We're exploring shows beyond Top Chef and how to do this. **You just announced a partnership with cars.com at the Cable Show to hold a parallel contest tied to the 2nd season of "Work of Art: The Next Great Artist." Do you worry about going too far with these sorts of brand integrations?** It's all about how you do it. If it works creatively and the audience doesn't feel like you're trying to pull one over on them—if you're quite up front about it and the brand fits—it can be incredibly powerful. It can also be dangerous if it's a stretch. Something like this cars.com is a great way to go as it's taking the show brand to another platform and doing something that is absolutely organic to the show. So you have the artist basically designing the trophy, so it's a natural challenge that's just sort of moved onto another platform. So the power of these integrations—when they're well executed—is that they can be incredibly effective, and we've seen those stats over and over again... They work when the brand is right for the show. **How's life under Comcast? Anything different with your day-to-day operations?** There's nothing but support for Bravo from Comcast, and I'm excited about that. The great thing for us is that we have been allowed to keep growing our original hours. So we're adding another 20 percent of original hours this year. It's the most powerful tool in terms of growing the network, growing viewership, driving engagement and really being an effective—dare I say it—DVR buster... I can remember a time when we had one original night, and now we have 5. And fairly soon, we'll be at 7 original nights. And that's how we're improving our audience steadily.

**Ratings:** CNN's 1st GOP debate delivered 3.16m total viewers and 918K 25-54s Mon night, according to **Nielsen Fast National** data. Compared to CNN's first Republican debate in the 2008 Election Cycle (6/5/07), last night's debate was 54% ahead among total viewers and was 23% ahead among 25-54s.

**Programmer Chat:** *Byron Allen* didn't mince words at one **Cable Show** panel as he slammed cable programmers for what he described as production inefficiencies that drive up costs and result in higher fees to cable ops and consumers. The founder, owner and chmn of indie programmer **Entertainment Studio Networks** said cable's in for a "rude awakening" as the lower-cost economics of Internet content combines with more views and traffic, forcing traditional programmers to dramatically slash production costs to compete. He said content firms have "created a very inefficient model that's coming back to haunt them" as more producers, writers and show creators look toward the Web for more creative freedom. "It's moving faster than anyone thinks," he said. Of course, veteran programmers on the panel didn't exactly buy in to Allen's dire scenario. "Certs is a candy, and Certs is a breath mint," said **Investigation Discovery** and **Discovery** Emerging Nets pres/gm *Henry Schleiff*, who said it's "extremely difficult" to create good content that interests enough people to sustain advertising but that both high- and low-cost content can co-exist. Said **Cooking Channel** gm *Michael Smith*: "Everyone wants it to be either-or. I see a world where everyone's right." **WE tv/Wedding Central** pres/gm *Kim Martin* said programmers understand that "the world has definitely changed, and it's extremely competitive," putting pressure on license fees. But she said one alternative to slashing production costs is simply growing ratings/ad dollars and exploiting digital platforms to make up for smaller increases on the license-fee side.



**Programming: In Demand** is set to produce “NASA Last Launch,” an original 3D special about the Atlantis space shuttle launch that will be available free for On Demand cable subs. The 1-hour special will premiere approx 2 weeks after the shuttle launch (scheduled for July 8). -- **Nat Geo Wild** greenlit 3-part series “Animal Underworld with Henry Rollins,” which features the rocker exposing the world of exotic pet ownership (think lions and crocs). Other new series for the net include “Baby Animal Cam,” following newborn animals. -- **ESPN** announced “ESPN Films on Classic,” creating a consistent destination for sports docs on ESPN Classic. The current programming plan for “ESPN Films on Classic” is to showcase films for 50 hours each weekend starting at 10 pm ET every Fri through midnight every Sun. ESPN Films currently owns an extensive catalog of titles and additional docs are being produced annually. ESPN Films will also look to make acquisitions of sports films to. Additionally, ESPN Films is creating an annual documentary film series, to debut on ESPN in the fall. -- “Hunger is the only disease you and I can cure in our lifetime,” **Meals on Wheels Association of America** CEO *Enid Borden* tells us. The group and its army of nearly 2mln volunteers serve 1mln meals daily to those 60+ who have a need. The cable hook? In the fall **RLTV** will begin a series about all this called “Good Food, Good Deeds.” Hosted by *Florence Henderson* and *Joy Bauer*, the series will visit some of the 5K MOW programs throughout the country, Borden says. There also will be segments on nutrition, she adds. The point of the series is to promote healthy eating and urge viewers to donate their time or money to stamp out hunger, Borden says. “This is the richest nation on Earth. Nobody should go hungry,” she adds.

**WICT Lunch: CNBC’s** *Maria Bartiromo* eschewed cable to discuss economic issues during her keynote at **WICT’s** Signature Luncheon. Drawing on her extensive foreign travel and inserting a healthy dose of famous names, Bartiromo pushed the need for US business to expand overseas. She noted 3 economic trends: international demand, mobility and innovation. Consumers are “buying all sorts of stuff” in Brazil, she said, noting it’s a story not generally known. In one of her few cable references, she underlined the cable opportunity in Brazil, where just 20% of the country has pay TV. On mobility, she said “[**Google** chief] *Eric Schmidt* told me “there are 4.5bln mobile phones in the world, but only about 1bln PCs; that’s all you need to know,” Bartiromo said. Investors are seeking innovation in business, healthcare and consumer technology, she said. With all this overseas potential, she’s not concerned about US jobs moving overseas. US firms must innovate to remain competitive, she said, yet “nothing moves in a straight line up.” Brazil has problems with individual security—she needed a bodyguard while there—and China’s environmental issues damage its economic growth. -- As previously announced, **WICT** saluted shows from **ESPN, WE tv, TNT, Style** and **USA** for their strong female characters.

**Show Floor:** UT men’s basketball coach *Rick Barnes* will be in the Disney/ESPN booth Wed (11:30-12:30 CT) to promote the launch of the **Longhorn Network**. Miami Dolphins running back and ’98 Heisman Trophy winner *Ricky Williams* will be at the booth from 2-3pm. -- **Turner’s** booth has a photo opp today with Bugs, Daffy and Road Runner (11am-1pm).

**Technology: CableLabs** released an updated technical report to establish a set of consensus requirements for a new device, the Converged Cable Access Platform, that facilitates the evolution to a converged access network architecture. CCAP integrates the functions of broadcast and QAMs, as well as DOCSIS 3.0 downstream and upstream interfaces.



It also includes the option to support passive optical network (PON) termination equipment in the same chassis.

**The Son Rises in the East: The Cable Show** allows for farewells to those leaving and greetings to newcomers. A notable addition to the latter is *Kevin Morrison*, 23, attending his first cable show. Morrison joined **Sportsman Channel** a few weeks ago as an affiliate operations assistant. It's his first job, although Morrison has cable in his blood; his mother is **TW Cable's** communications chief *Ellen East*. "I'm very proud of him, but it feels weird. I can remember bringing toys and story books home for him from the Show floor when he was a little boy and now he's here working," she says. East adds, "I can't possibly be this old." Our thoughts exactly, Ellen.

**People: MSG Media** hired **Fox Cable Nets' Andrew Biggers** as the new svp, content distribution. It upped *Alison Hellman* to vp, affil marketing. -- **Nat Geo Nets** upped *Lisa Clark* to svp, consumer marketing and strategy.

**5Qs with IFC gm Jennifer Caserta: With "Commercial Kings" (premieres June 24, 10pm) you are betting that an Internet hit will translate to TV. What are you basing that on?** We find the Internet is a real breeding ground for talent. We've discovered a lot of pilots; that's how [IFC series] "Portlandia" was born. We've found a lot of talent online, comedy troupes, characters and comedians. So, for us, it follows very nicely in the history of how our programming has evolved. Translating what [*Rhett McLaughlin* and *Link Neal*] do online into a [TV] show; what you don't get online but you will get as part of the half-hour series is really seeing the back story and the characters behind how these commercials are made. What's sweet and funny and engaging about this show is how charming they are as they help make commercials. **Talk about 'docu-comedy,' which you've said is IFC's word for unscripted non-fiction.** There are a lot of different genres out there. You have reality, competition reality, docu soap, docu series. We want to be expert in docu comedy. Alternative comedy has become a real thing for us. We want to take the sensibilities you've found in our scripted shows and translate them to non-fiction. What it means is the topic, the subject matter and the cast are all borne out of an independent perspective, which is at the core of what we do. But the shows themselves are innately comedic. There is an underlying tone that is humorous. That's what so slightly off about them. **So for Commercial Kings?** The local commercials are just funny. They're cheesy, people love them, they're memorable and people love them. And Rhett and Link are funny, too. **Your series about mustache competitions "Whisker Wars" (premieres Aug 5, 11pm) must be a hoot.** Yes. The competitors take what they do very, very seriously. But I think their world will give you chuckle. It's an underground culture that most people weren't even aware of. People who take a passion for what they do to an extreme often gets so over the top that it is comedic because it becomes so ingrained as part of their lives. For these guys it's about grooming their facial hair; having rivalry and setting up teams across the country. **You mentioned comedy is a sweet spot for your audience. Did research bear that out?** We did a large research study, which helped us reach that conclusion. We were already dabbling in the world of comedy; we had some scripted shows and comedic indie films. We did a segmentation study and ethnography. What we heard repeatedly was our audience felt under-served in a type of comedy. They kept pointing to "Arrested Development" and brands like "The Onion" as the comedic brands they're most passionate about and ones that they'd like to see brought to television, so we did that.

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# BUSINESS & FINANCE

**Tech Notebook:** BlackArrow will spotlight its advanced ad system's new support for iOS- and Android-based tablets and demonstrate dynamic VOD ad insertion. -- **ComScope's** set to intro what it believes to be the cable industry's 1st all-digital, carrier-grade wideband edge QAM solution. It offers up to 160 QAM channels on each of 16 RF ports to total 2560 QAMs, a density offering cable ops the flexibility to roll out new services without the need for truck rolls or service disruptions. -- **Alcatel-Lucent** and **thePlatform** have strategically aligned to help cable and IP providers deliver live TV, VOD and TV Everywhere services across platforms. The joint solution is comprised of 3 main components that can be deployed individually or in combination: a multi-screen cloud, CDN and suite of consumer apps designed to support video playback on a PC, tablet or mobile device. -- Spanish-language entertainment programmer **Imagina US** tapped **Comcast Media Center** to deliver its VOD content, which is currently available on Comcast's Xfinity on demand platform.

**Public Affairs:** On June 17, **Discovery** hosts its 2nd "Discover Your Impact Day," a company-wide volunteer effort led by Discovery's workforce. 3K employees across 5 continents will volunteer in more than 140 activities that benefit the land, water and people of our planet.

## CableFAX Daily Stockwatch

Company	06/14 Close	1-Day Ch	Company	06/14 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
DIRECTV:	47.16	0.56	BLNDER TONGUE:	1.86	0.05
DISH:	28.13	0.35	BROADCOM:	33.16	0.86
DISNEY:	38.59	0.22	CISCO:	15.08	0.02
GE:	18.60	0.21	CLEARWIRE:	3.84	0.02
NEWS CORP:	17.10	0.14	CONCURRENT:	5.85	0.03
<b>MSOS</b>					
CABLEVISION:	36.42	0.94	CONVERGYS:	12.67	0.19
CHARTER:	55.96	0.50	CSG SYSTEMS:	18.02	0.05
COMCAST:	23.93	0.22	ECHOSTAR:	32.09	(0.57)
COMCAST SPCL:	22.59	0.20	GOOGLE:	508.37	3.64
GCI:	11.41	0.15	HARMONIC:	6.91	0.13
KNOLOGY:	14.33	0.40	INTEL:	21.82	0.43
LIBERTY CAPITAL:	80.68	1.36	JDSU:	17.20	0.59
LIBERTY GLOBAL:	41.25	(0.08)	LEVEL 3:	2.23	0.03
LIBERTY INT:	16.74	(0.07)	MICROSOFT:	24.22	0.18
SHAW COMM:	21.20	0.41	MOTOROLA MOBILITY:	24.03	0.75
TIME WARNER CABLE:	75.00	1.28	RENTRAK:	18.94	(0.01)
VIRGIN MEDIA:	31.67	0.27	SEACHANGE:	10.61	0.31
WASH POST:	421.71	6.04	SONY:	25.20	0.11
<b>PROGRAMMING</b>					
CBS:	26.21	0.39	SPRINT NEXTEL:	5.33	0.07
CROWN:	1.80	0.08	THOMAS & BETTS:	50.86	1.48
DISCOVERY:	40.48	0.49	TIVO:	10.32	0.33
GRUPO TELEVISIA:	23.19	0.86	UNIVERSAL ELEC:	24.93	0.39
HSN:	31.87	0.22	VONAGE:	4.25	0.26
INTERACTIVE CORP:	35.45	0.19	YAHOO:	15.20	0.04
LIBERTY:	41.03	0.32	<b>TELCOS</b>		
LIBERTY STARZ:	75.37	0.64	AT&T:	30.79	0.24
LIONSGATE:	6.21	(0.01)	VERIZON:	35.58	(0.05)
LODGENET:	3.17	0.02	<b>MARKET INDICES</b>		
NEW FRONTIER:	1.33	(0.07)	DOW:	12076.11	123.14
OUTDOOR:	6.00	0.10	NASDAQ:	2678.72	39.03
SCRIPPS INT:	46.33	0.54	S&P 500:	1287.87	16.04
TIME WARNER:	35.04	0.40	<b>TECHNOLOGY</b>		
VALUEVISION:	7.85	0.46	ADDVANTAGE:	2.53	(0.02)
VIACOM:	55.86	0.90	ALCATEL LUCENT:	5.40	0.25
WWE:	9.30	0.17	AMDOCS:	29.15	0.33
<b>TECHNOLOGY</b>					
AMPHENOL:	51.30	0.63	AOL:	20.12	0.81
AOL:	20.12	0.81	APPLE:	332.44	5.84
APPLE:	332.44	5.84	ARRIS GROUP:	10.76	0.27
ARRIS GROUP:	10.76	0.27	AVID TECH:	17.54	0.96
AVID TECH:	17.54	0.96	BIGBAND:	2.12	0.07
BIGBAND:	2.12	0.07			

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# SHOW TWEETS

## Cable Show Twittersphere

Too busy to keep an eye on your Twitter feed during the Cable Show? Never fear, we've rounded up some show-themed tweets to give you some of the flavor of what you missed.

**@katcableclassrm:** Love the staging at the #Cable11 general session! The banter btwn Kent & Zaslav is funny! <http://twitpic.com/5bi4I3>

**@scrippscomm:** Discovery's Zaslav: #cable11 is like "Lollapalooza without the smell"

**@MichaelTurk:** NCTA President Michael Powell quotes Vaclav Havel: "Everything is possible and nothing is certain." #cable11

**@sdkstl:** Only mildly surreal to see Michael Powell hosting #cable11 as head of NCTA instead of doing a star turn as FCC chairman. Enough distance.

**@CanoeVentures:** Chicago's mayor thanked cable industry for its economic impact- 68,000 cable employees in Chitown & bridging the digital divide. #cable11

**@JonErlichman:** Oh man...I should've done cross training to prep for walking these football field floors #cable11

**@gregobr:** Oy. "I'm at the Cable Show" and "stop by our booth" not really worth tweeting, #cable11 attendees. Add something cool!

**@awallenstein:** Time Warner CEO Jeff Bewkes laments he's been "overquoted" on the subject of Netflix #understatement #cable11

**@twxcorp:** Bewkes: "Put the TV on all the internet devices and don't charge extra!" #cable11

**@ladysportsman:** Scott Leysath is cooking rabbit rattle-snake sausage at booth #1545 #cable11 <http://twitpic.com/5bj50e>

**@KrystalBowden:** TW CEO Jeff Bewkes on future of cable tv: "Let's all cheer up; this isn't the music industry." #cable11

**@CableShow:** Rumor has it that @EpixHD has some of the best bags on the Show Floor & I hear what they are demo-ing is pretty cool too. #cable11

**@Matt@ACA:** Liz Claman of FOX just missed an excellent opportunity to get into programming bundling and cost issues. Too bad. #cable11

**@BCBenGrossman:** Sign at HDNet #cables show booth. @mcuban not in Chicago. Apparently busy with some guy named Larry O'Brien. <http://lockerz.com/s/110712761>

**@CTInsider:** Waiting for the IPv6 marathon to begin at The Cable Show. Early attendee comment are that, while IPv6 Day went well, there were glitches.

**@NCTACable:** Don't forget, all general sessions streamed at [live.thecables show.com](http://live.thecables show.com) and one is on now #cable11

**@SenaFitz:** Rahm at #cable11 apologizes to industry for brother Ari, says he likes Ari Gold better

**@Mark2CableShow:** First 200 people at The Park's 12:30pm presentation today (Booth 2231) receive a cool Groupon give-away. <http://t.co/Ori2Fih> #cable11

**@BrianDietz:** Nick Faldo at the Cable Show! <http://yfrog.com/h3doobsj>

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# The Cable Show Anniversary

## Sixty Sweet Years

This year marks the 60th anniversary of the **Cable Show**. You read that right. 60 years! To get some perspective on what all has taken place over those six decades, we caught up with **NCTA's** de facto trade show historian, *Barbara York*—who is attending her 30th show this year in Chicago.

“As I understood, a group of cable operators just got together that [first] time to figure out what they were doing. They enjoyed themselves as cable is wont to do, and said we should have an association,” said York. “NCTA was born after the Cable Show. I think the organization was formed in '52.”

Of course, it took awhile for booth babes and flashy programming to join the exhibit floor. **CableFAX** founder and **Media Business' Paul Maxwell** reminded us that a state-of-the-art network in '72 featured a camera moving (jerkily) from a clock to a thermometer to a typewritten news bulletin to an aquarium. Yes, an aquarium that he said even had a deep sea diver going up and down.

“The show in New Orleans in '75 was raucous. Some programmers were beginning to show up, and *Ted Turner* announced his satellite launch,” Maxwell said. “**HBO** started hosting parties. They had *Glen Campbell* and *Tanya Tucker* when they were riding high in '80 in Dallas. Dishes started popping up that year, mostly financed by **Time, Inc. Titsch Publishing (CableVision)** began helping back *Brian Lamb*, then *Bob Rosencrans* and *Bill Daniels* jumped in and **C-SPAN** actually got created.”

And then there are the parties. Oh, the parties.

“**CBS Cable** built an oasis in the Las Vegas desert in '82. They had tents, camels, water fountains,” recalled York. “I thought, ‘Oh my God. Where have I landed?’ It blew my mind.”

Going to **Daniels'** cocktail party became a must, Max-

well said, recalling that **Jerold's** huge shindigs were eventually replaced by HBO's.

1985 was somewhat of a downturn for the show, as it was after the passage of the '84 Cable Act. But things picked back up in the '90s, before dipping down again in the early 2000s and then picking backing up (Remember when *Michael Jackson* made an appearance at the show?). At its heyday, the Cable Show was at more than 300K square feet. Today, it's at about 130K. At its height, there were about 30K attendees whereas today attendance is in the 12K-15K ball park.

“But now it's such a different show,” said York. “When it was 300K square feet and 30K people, it was pretty much mayhem.”

Maxwell summed it up like this: “It grew and grew and grew until consolidation began. Then it began to shrink. Still big and still here—unlike ComDex and others.”

And through it all, cable has continued to have a rich history that's captured the attention of many—even its newcomers.

“I really have always enjoyed the heritage of this industry,” new NCTA pres/CEO *Michael Powell* recently told us. “It's one that's populated by leaders who have a longstanding love of the industry and often have family and family before them who were involved. That contributes to their engagement and their focus. It's not an association that suffers from apathy or disinterest from its most senior leaders.”

That shows when you're walking around McCormick Place this week. Next year the show heads to Boston before hitting D.C. in 2013, only its 2nd time in Washington. 2009 marked the Cable Show's 1st visit to the Hill.

- Amy Maclean



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## Think about that for a minute...

### How Could They?

Commentary by Steve Effros

Another seemingly successful Cable Show is almost done. It's providing all the razzle, dazzle, information and, yes, hyperbole that always goes along with a major trade show. Congratulations to all who are responsible for putting this giant thing together and making it work.

I would suggest, as I did last week, that the "take away" from this Show is not terribly different from what has been the case for many years now; the cable industry is growing, finding new, profitable services that it can provide to the public, and, predictably, is never quite sure which way to turn and what path to take first among all the technological and business options spread out in front of us.



Clearly broadband service has been a phenomenal success. It's a service the public wants, and cable can deliver it better than any other. Cable's telephone offering has turned out to be far more successful than even the most bullish "analysts" imagined during panels at the Cable Show just a few years ago. Back then there was still a question as to whether cable's "cable guy" reputation in the TV delivery business was going to rub off and hurt us in the phone and broadband business.

But once we started delivering broadband, and it turned out to be not only an excellent service but the customer satisfaction ratings were at the top as well, folks began to recognize that the initial problems of first installs, crushed rose bushes, late arrivals, etc, are not simply because we

were "the cable guys" but because infrastructure building is hard and delay-prone no matter who does it. Verizon's FiOS installers are learning that the hard way.

We did something no one has done in half a century. We went into a vast majority of American homes, one-by-one, and did installations while the system was "live." Did we mess up sometimes? Sure. Can we always do better? Of course. But we've done it, and now, as this Show has amply indicated, there are innumerable opportunities.

Is IP the right way to move or should we use more "switched digital" or combine the two? Is "TV Everywhere" something the average customer plans to use a lot or is it really a technical response to allowing different screens in the house to more easily access what they already have? Is it a "different" business or the same business? Do folks really want more speed on broadband or do they really just care about ease of use?

These are all questions being debated at this Show. To put it mildly, there are varying, strongly held opinions. The CEOs, the CTOs, the analysts, anyone with just a modicum of humility acknowledges they don't really know. That's the beauty of our industry. It's so dynamic that anyone who says they know for sure is likely to be at the least challenged, and ultimately only partially right.

Which leads to my last question; how the heck can the FCC think that it "knows"? How could they?

*Steve*

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## GUEST COLUMNIST

### Opportunities Abound

This is a time of enormous opportunity for the cable industry. For example, let's consider advanced interactive advertising. Today, advertisers want a platform that can deliver their messages in ways that are targeted and measurable, over a large footprint, and that can empower a broad spectrum of consumers to not only view their messages, but also complete transactions. And they want all of this done in ways that completely respect each consumer's privacy concerns. Digital cable platforms are responding to these requirements.

Specifically, cable operators and the industry's joint venture, Canoe Ventures, are implementing CableLabs EBIF technology and other related tech, such as those defined in the SCTE-130 standard and CableLabs' Stewardship and Fulfillment Interface (SaFI) specifications. These technologies define how advertisers may enjoy the benefits of interactive, measurable and actionable messages across the majority of already deployed digital interactive cable STBs, plus the millions of new cable devices that are being deployed each year.

The promise of EBIF technology is that an interactive application written for one EBIF enabled STB is able to run on any other EBIF enabled STB. During the past year, CableLabs has held a number of interoperability events during which suppliers have been able to confirm that this promise has become a reality. The results of these interops are impressive. Not only have they provided direct evidence of interoperability across devices and systems, but I've been excited to see the growing diversity of interactive apps being tested. For example, at the last Interop, we saw demos of the

ability to run the same interactive apps within VOD content across multiple cable operators thanks to the latest 2.1 version of the recent SaFI specification.

Another very exciting development has been the progress in something that we have started calling CableNext technologies. These are the set of technologies that underlie the next generation of cable service—technologies that are not necessarily specific to cable. Instead, cable is embracing the technologies and open standards of other industries including consumer electronics and the Internet. As these technologies mature and become cost effective, they can free our industry from the traditional cable STB and its limitations.

It was at last year's Cable Show that Brian Roberts demonstrated how "the magic of EBIF" permits an iPad to change channels on a STB through the cable network. That was only the beginning. In this year's CableNET booth there are already multiple examples of how the industry is empowering cable subscribers to use consumer electronics devices to access cable services.

Let me say a few words about tru2way. This year in CableNET you can see many demonstrations that reflect the rapid adoption of tru2way and the ability of it to serve as a bridge to the world of CableNext services. Many cable operators are finding that tru2way offers an efficient and evolvable platform that provides a graceful path to migrate from today's MPEG protocol distribution of cable video services to an expanding spectrum of CableNext services.

Bottom line: this is a time of enormous opportunity for the cable industry.



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## GUEST COLUMNIST

### Getting Technical

As the name of our organization implies, we spend a lot of time with the cable engineering community at the Society of Cable Telecommunications Engineers. But rarely have the opportunities for interaction been as intense as they have been over the past several months. Between the highly-successful debut in April of our SCTE Tuck Leadership Institute at Dartmouth College, the acceleration of our planning activities for SCTE Cable-Tec Expo later this year and regular discussions with our Board and our CTO advisors, our SCTE team has had more than the usual opportunities to take the pulse of the issues facing the industry.

We've heard interest in monetizing TV Everywhere and On-Demand services that promise new ways to reach consumers; concerns about the potential of Netflix and other services that use our bandwidth even as they compete for customers; a desire to learn more about optimizing networks to deliver the next generation of IP services; and increased attention to the potential of higher-margin business services. It's a full plate of issues, so the opportunity couldn't be more timely for a deep dive into where cable is headed and what technologies, processes and best practices will be needed to get the industry there. At the Cable Show this week, management sessions, the Spring Technical Forum and exhibits on the show floor will help the industry explore the nuts and bolts and the practical application of technologies that can reduce costs and generate new revenues.

But to achieve maximum benefit, it is vital that all segments of the industry are partners in an ongoing educational process. To that end, SCTE has been actively involved with

NCTA and CableLabs in the planning of the Spring Technical Forum. SCTE CTO Daniel Howard, who helped to organize the STF sessions, is moderating a panel entitled "HFC-ing the Light: Advancements in Next Generation Architecture." At the SCTE booth in the IPv6 Pavilion, Steve Harris, director, advanced network technologies for SCTE, will offer expertise regarding the impact and benefits of the fast-approaching transition to IPv6.



**Mark Dzuban**

Just as important as The Cable Show activity is the alignment that has taken place between the Spring Technical Forum and SCTE Cable-Tec Expo November 14-17 in Atlanta. Our Program Committee, chaired by Suddenlink CTO Terry Cordova, has created an agenda that will further the discussions that are taking place in Chicago, as well as other topics that are pertinent to engineering and operations teams. It's clear from our interactions with the cable engineering community that our industry is at one of those pivotal moments when both the challenges and the potential rewards are great. New thinking in such areas as multi-platform delivery, energy management and relationships with consumer electronics manufacturers are leading to solutions that were well over the horizon just a few years ago.

From my vantage point, it's been encouraging to see how vendors, operators and even programmers are working together to shape the next generation of cable services. I'm looking forward to hearing the discussions this week in Chicago, to watching the Cable-Tec Expo program develop, and to seeing the results of our collective efforts in the future.

*(Mark Dzuban is pres/CEO of SCTE).*

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## GUEST COLUMNIST

### A Call to Lead

It's Census time, and once again the data are characterized as a wake-up call to national, state and local government; the industrial complex; the education system; and (closer to home) the world of media. The analyses, the predictions—some dire, some encouraging, some containing shades of both—have been ongoing since the 2010 numbers were made public some months ago. The big story: the population is shifting in such a fashion that in the not too distant future, ethnic minorities will outnumber whites in the United States.

Now what? Amid the inevitable debate about balanced representation across the communications industry terrain—on air; behind the scenes; content creation; strategic programming philosophy—we should not forget that this is more than a game of numbers. The numbers are mere proxies for people: their cultures; their ideologies; their shared sense of their historical contexts.

This week, NAMIC will celebrate the achievements of 16 Next Generation Leaders and Luminaries of color at our Annual Awards Breakfast during Cable Connection-Spring in Chicago. With the honor, however, comes a call to lead with their proven talents, with their powerful minds, and most of all with their hearts and ears open to new voices, new values, and new truths. This is the real change heralded by the Census numbers.

The most telling marker of the leadership acumen of



*Kathy Johnson*

these young executives ultimately will be their commitment to (and skill at) tapping into the human core of this “new” population to sound their joys, their fears, their laughter, and their pain, and then to translate all of this into powerful, meaningful, compelling, and fully representative imagery.

How will this be accomplished? There is no one single answer to that question, but there must be at least one common element in all the competitive responses: the imperative for a workforce that mirrors the mosaic of the emerging U.S. (and global) population. Another critical marker of the success of these emerging leaders and luminaries will surely be their commitment to (and skill at) galvanizing the collective creativity and thinking of a fully engaged and diverse workforce.

This will, in some cases, mean deconstructing entrenched notions about diversity, and reconstructing systems of authentic inclusiveness that are buttressed on all sides by aggressive and courageous systemic change metrics, accompanied by simultaneous top-down and bottom-up shifts in organizational mindsets. These leaders in the pipeline will be called upon to be the architects of business models that understand and embrace the notion that the customer base on the outside and the workforce on the inside are part of the same multicultural fluidity that will ultimately determine the success or failure of the enterprise.

*(Kathy A. Johnson is pres of NAMIC).*

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# EYE ON ADVERTISING

## Chasing Ad Dollars

*How can cable networks woo big advertisers? Richard Quigley, president of Ink from Chase, has a few ideas. Chase rolled out its new Ink card suite targeted at small business owners 18 months ago, and cable has been an integral part of the launch. Quigley talked with Cathy Applefeld Olson about why his team had its eye on particular networks, the importance of tech innovation and the brand-new interactive ad campaign Chase created with The Weather Channel, which debuted June 6 and touts its new mobile application Jot.*

### Can you describe the role television, and specifically, cable, has played in the Ink from Chase rollout?

RQ: We are trying to help the Ink brand to come alive in a very 360-degree way, and a very essential component of that is television. What we like about cable television in particular is its ability to be highly targeted. Small business owners are a segment with particular types of viewing patterns and dayparts they will participate in, and cable gives us that ability to make sure we are getting our message delivered most efficiently for our advertising dollars. Cable also provides a level of flexibility that we might not always be able to get with broadcast, especially in terms of adopting new technology.

### What kind of flexibility are you finding in the cable world? Do the deals tend to move faster?

RQ: They do move more quickly, and there's a greater tolerance for experimentation. I think what we've found

that's been particularly good is that a lot of cable properties operate with an entrepreneurial mindset. So they completely get the segment we are going after and completely understand what we are trying to do in terms of differentiating our own brand, and leverage innovation.

### Are there current Ink television ads using new technology?

RQ: We are doing something with the Weather Channel where we incorporate QC codes into a commercial for our new mobile application Jot. Typically you would see those in print ads but this tie-in will be done on television. Viewers can aim their smart phone at the television while the QC code is displayed and link to Web site.

### That's pretty revolutionary. Why did you pick Weather Channel and how did the ad campaign evolve?

RQ: We spoke with a variety of different cable channels and Weather Channel had the same sort of interest in wanting to leverage new technology. They were willing to try to do this with us. One of our insights around small business owners is they're constantly on the move and on the road, drumming up new business. So they might be in a hotel room and this is a great opportunity for them to pick up their phone and click the picture and get connected to the Web site and learn more about Jot.

### Did your team co-create the campaign with Weather?

RQ: The campaign is still developed by Ink from Chase, but they were willing to display it like this and work



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## EYE ON ADVERTISING

with us to make it happen. Part of what the brand itself stands for is innovation, and we wanted the innovation to be manifested not only in the concept of Jot, but also in the way we are using media – so the medium itself was in the message. We are looking for media properties to have that innovation and be able to manifest it in ways where we are working together, so it is very much a joint initiative.

### Which other cable networks make sense for Ink from Chase?

RQ: ESPN, CNN, TNT, Fox News, Weather Channel. Those are the properties that are most [cross-over] on small business owners' viewership.

### What does a cable network need to do to attract your advertising business?

RQ: First and foremost, is that they are really able to attract a large small-business-owner population. The other thing is they have a more flexible mindset of understanding that there are things we might want to consider that go beyond the traditional 30-second spot, to be able to look at different ways of bringing the brand to life and articulate the benefits to the small business owner, perhaps in new ways than have been done historically. And they need to have an interest in experimentation, an openness to a nontraditional approach and the ability to think of the medium as being part of our message.

### Are you working on any ad campaigns that involve show sponsorships or any other types of integration?

RQ: We have a variety of conversations going on that involve exactly those kinds of things but nothing we can share just yet.

### What else would you like to see from your cable partners?

RQ: One of the other things we've been looking at is cross-platform integration. So we'd look for them to come

up with ways that, in addition to being integrated in a particular spot that might run in a particular daypart on a particular channel, can also integrate with our Web site, and with their Web site. And we want to explore what sort of mobile extensions we can have for their properties to leverage it as broadly as possible.

### The Jot application runs on both iPhone and Android phones, I believe.

RQ: Yes, so there are all kinds of ad possibilities around that. What's interesting about this particular one is that what Jot is designed to do is based on another insight about the small business owner. People went into small business because they had a real passion for their idea or dream, but they find there's a lot of time spent tied up in the back office. Jot allows them to tag a transaction within seconds after it happens so it saves time on the back end. I mention this because someone using Jot is interacting with the application every transaction they make – so that becomes a completely new touch point that we have with our customers that we never existed before.

### How important are the Upfronts to Ink from Chase? When do you tend to get your ad deals done?

RQ: It's moving toward a 365-day-a-year [process]. It was more Upfront-oriented when it was thought of within a more restricted context, meaning purchasing 30-second spots. Once you start thinking more holistically, whether with integrations or cross-platforms, having a more ongoing dialog is the way those things happen - as does experimenting, finding out what works, refining and moving on to the next thing. Now it's more about having that partnership with a cable network, and knowing we are going to embark on this experimentation together.

*(Longtime entertainment industry reporter Cathy Applefeld Olson is delighted to be documenting media's wild ride into the 21st century).*



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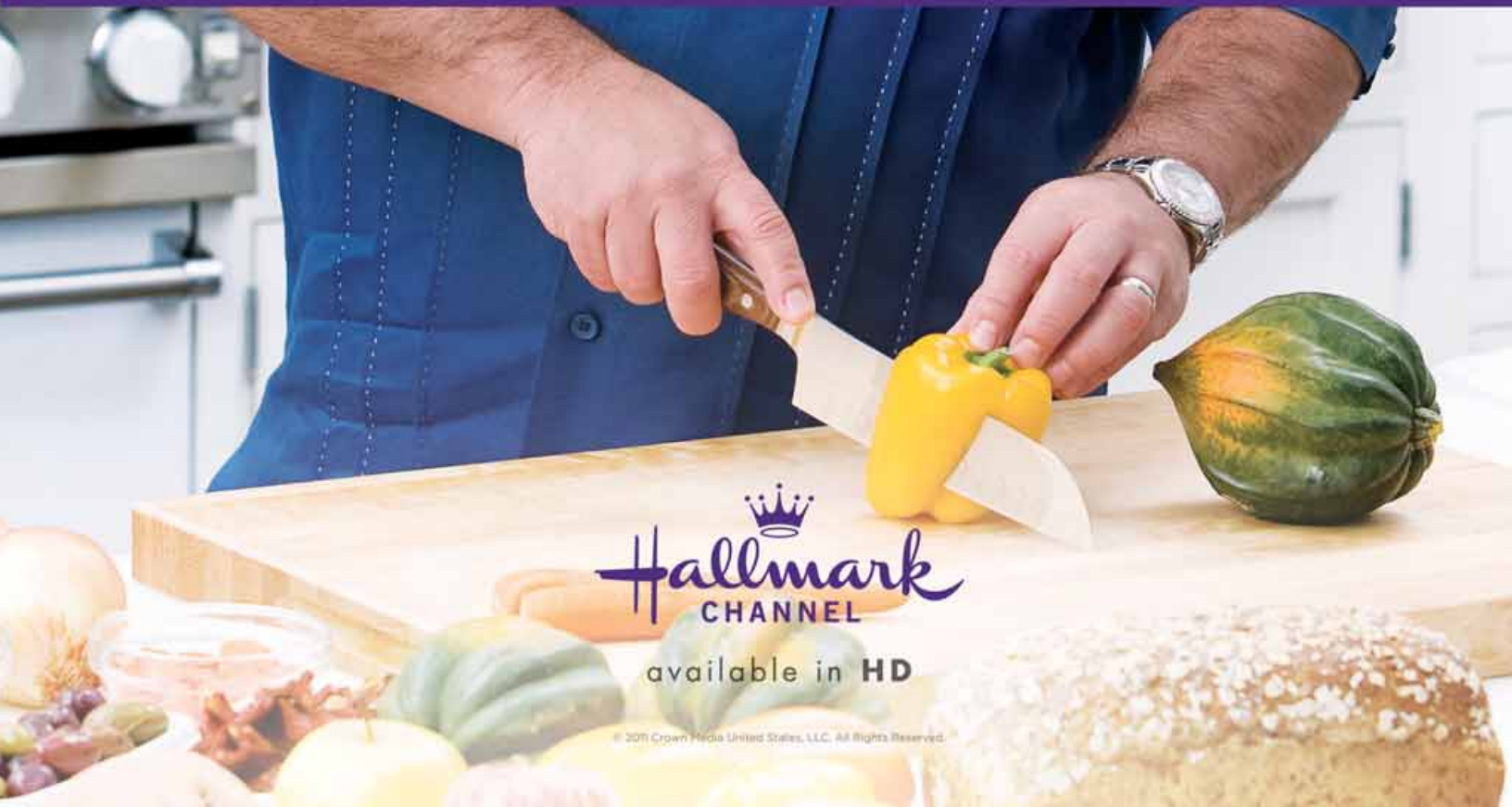
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