

# CableFAX Daily™

Thursday — January 28, 2010

What the Industry Reads First

Volume 21 / No. 018

## Comcast Tour: Roberts Addresses Synergy, Leno, 3D TV

Was *Brian Roberts* on Team Coco or Team Leno in the late night wars? We may never know. The Comcast CEO said Wed it was “frustrating” watching the “Tonight Show” saga at **NBC** because legally Comcast couldn’t discuss it. “We, like you, read about it,” he said at the State of the Net conference in DC Wed. One thing he did voice clearly was his optimism in the **NBCU** deal, calling it a bet on the future. “The world’s moving at an alarmingly exciting, fast past, and I think content will be at the center,” he said. “If it’s legal and not pirated and it’s well done, the value is going to flow to the content.” He said Wall St views synergy as, how many people can you lay off? “If you can’t show on the 1st day how many people will be eliminated, then it must be a bad deal,” Roberts said. “We know there’s plenty of good ideas in the world that didn’t start with people getting fired.” While he doesn’t see many obvious overlaps between Comcast and NBCU, he does believe there’s synergy—citing how none of Comcast’s cable nets are a top 30 net in ratings. One example he gave is that **G4** could enjoy the benefit of NBCU’s scale by associating it with **SyFy**. It also could answer consumers’ #1 complaint with Comcast VOD—they want more movies, he said. Other topics addressed included 3DTV. Roberts believes it’ll happen, but rather than people sitting around watching 3D video for several hours a day, it’ll be an event with a premium price tag. He likened the tech to chocolate sundaes, saying you don’t indulge in one for breakfast, lunch and dinner. As for net neutrality, Roberts said Comcast made a mistake in slowing down some **BitTorrent** traffic as part of its network management. “We realized that was not the right solution,” he said. “We came up with a different scheme that accomplishes the same goal.” Roberts also reiterated for the umpteenth time that Comcast isn’t going to make NBC a cable channel. “There’s still a broadcast audience. Look at Sun Night Football vs Mon Night Football. And when Mon Night Football went from **ABC** to MNF on **ESPN**. The audience went down,” he said. “For those of us who are connected, you can’t understand that. But there are people who aren’t connected, and there are people who turn on their dial and they want to watch broadcast because that’s how they were trained.” Roberts will be spending a lot more time in DC these next few weeks, talking up the NBCU deal. 2 Hill hearings on the subject are slated for next week.

**Apple vs Cable:** Looking rather buttoned-down in his grey suit during a Q&A at the State of the Net conference, it was clear *Brian Roberts* is no *Steve Jobs*. You’re on opposite ends of the coolness spectrum in terms of public opinion, inter-



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viewer *Alan Murray* of the *WSJ* said, a few hours before turtleneck lover Jobs revealed the iPad Wed. "That's a realistic assessment at some level," responded Roberts, reminding the audience that, among other things, Apple is intl vs Comcast's regional focus. But he told of hiring a few years ago an ad agency that determined Comcast isn't getting enough credit for its innovations. "On Demand is the greatest product in the world. We have something in the order of magnitude of 14bln television shows watched on demand..." Roberts said, adding that it's considerably more than the number of music downloads on iTunes since its launch. "How we tell our story to the consumer—we can do better," he said. "At the end of it all, I think we help enable as much change as any company and hopefully you will not feel that way about us in a couple years." As for the iPad, like everyone else, Roberts was in the dark about its specifics Wed morning. "Apple is on a tear. Their design sensibility is second to none," he said, adding that he's been to Apple many times to try and find ways to accelerate what consumers want. Later in the day, the world and Roberts learned that iPad will start at \$499. It offers a bigger screen for those iTunes video downloads. Meanwhile, we noticed a **Cablevision** PR exec on **Twitter** Wed reminding Optimum Online subs interested in the product that they have free WiFi through the MSO.

**Carriage:** **Time Warner Cable** and **Scripps Nets** entered into multi-year deals for **Food** and **GAC**. No terms were disclosed. TWC continued to carry the nets after its contract expired Dec 31 as the 2 sides continued negotiating. Cablevision, however, lost **HGTV** and **Food** on Jan 1. The nets returned to its 3mln sub footprint last Thurs under a new deal.

**Competition:** **Entropic Comm** HD DVR boxes with multi-room viewing are available to **DirecTV** homes by the end of Mar.

**In the States:** **Comcast** said it expects to begin conducting the 1st of several IPv6 technical trials within the next a couple of months. Currently, it uses IP version 4 addresses. "Many experts believe that this transition could be disruptive for Internet users, so the trials we plan to conduct in 2010 will help us identify and solve any areas of difficulty involved in the transition to IPv6," the MSO said in a blog post Wed, promising to share what it learns with the Internet community.

**Beta:** **Hallmark Movie Channel** ranked as the emerging net that cable ops most want to carry, with 67% identifying interest in carrying it by the end of '10, according to the latest **Beta** study. **PBS Kids Sprout** ranked 2nd with 64%, followed by **CBS College Sports** (52%). Among mid-sized nets, cable ops most desire **NFL Net** and **DIY Net**, with each earning 68%, followed by **Fox Business** (63%). The rankings were different when only ops with 100K subs+ were included. Among that group, **Crime & Investigation** ranked #1 for emerging nets (47%), followed by **Retirement Living** (37%), **MGM HD** (32%) and **Si TV** (32%). NFL led the mid-size group at 27%, followed by **MLB Net** (7%).

**In The Courts:** **AT&T** offered to pay \$16mln in cash and \$2mln in non-cash benefits to qualified NJ class members that alleged the telco's wireless early termination fee (\$150-175) charged from Jan 1, 1998-Nov 4, 2009, was unlawful. A court will rule on the proposal in Apr. AT&T denied culpability, saying "no court has found AT&T Mobility committed any wrongdoing regarding these fees. However, we have agreed to settle to avoid the burden and cost of further litigation." On Tues, the **FCC** on Tues sent letters to **AT&T**, **Google**, **Sprint**, **T-Mobile** and **Verizon** requesting info on wireless early termination fees.

**VOD:** **iN Demand's Black Cinema On Demand** bows Mon to celebrate Black History Month, and will feature films such as "The Color Purple" and "Ray." MSOs including **Comcast**, **Time Warner Cable**, **Cox** and **Bresnan** will feature the service, with prices from \$1.95-\$4.99. -- **Comcast** will offer *Pres Obama's* Union Address and the Republican response to the speech on VOD beginning Thurs. -- Available in more than 42mln US homes, **Music Choice On Demand** said **Rentrak** confirmed its status as the top VOD net of '09 with more than 1bln orders.

**Online:** **Syfy.com** is partnering with **Atari** to promote MMO game *Star Trek Online*, which launches for the PC next week. The site is offering special content and sweepstakes, and lets users buy exclusive digital downloads. To help celebrate the launch, a 2-day marathon featuring "Star Trek Next Generation" and "Star Trek Enterprise" will air on the linear net Mon and Tues. -- **Sundance Channel's Full Frontal Fashion** Website is launching 2 new series Feb 8 to celebrate NY's Fashion Week: "Dirty Denim" about the high-end denim biz, and "Catwalk Countdown" about designers preparing for Fashion Week.

**Programming:** **Setanta Sports** will go dark in the US on Feb 28, and effective Mar 1 transfer its rights to certain programming including soccer and rugby events to **Fox Soccer**. Also Mar 1, **Fox Soccer Plus** will launch in high def as a complementary net to Fox Soccer.

**On the Circuit:** **NAMIC** is calling for noms for its '10 Next Generation Leaders Awards, which recognize up-and-coming

# BUSINESS & FINANCE

execs that exemplify the org's mission to educate, advocate and empower for multi-ethnic diversity in the comm industry. Call **Sandra Girado** (212-594-5985, ext 23) for more info.

**Public Affairs:** **Ovation TV** and **Cable in the Classroom** collaborated on a free, online arts education curriculum for HS students, the groups said Tues night. The "Arts Ed Toolkit" features teacher and student resources developed with the NYC Dept of Education. It's available at: [ovationtv.com/educators](http://ovationtv.com/educators) and includes clips from Ovation TV series.

**People:** Former **HBO** exec **John Redpath** joined **Canoe Ventures** as svp, gen counsel. He most recently served as chief legal officer for the **US Golf Assoc.** -- **MSG**, which spins off from **Cablevision** Feb 9, tapped **Robert Pollichino** as evp/CFO, **Lawrence Burian** as evp/genl counsel and **Joseph Lhota** as evp, admin. -- **Fox** upped **Shana Waterman** and **James Oh** to vps, current programming.

**Business/Finance:** **Frontier Comm** said it got all the local franchise approvals in WA and OR required to assume control of certain cable franchises from **Verizon**. -- **Concurrent** reported 2Q10 rev of \$15mln (-17%) and net income of \$89mln, compared to \$530K a yr ago. The co said it recently inked a deal with a major North American cable op to deliver an advanced advertising, data collection and mgmt solution across VOD, linear, DVR, and interactive TV platforms.

## CableFAX Daily Stockwatch

Company	01/27 Close	1-Day Ch	Company	01/27 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
BRITISH SKY:	35.91	0.70	AMPHENOL:	40.79	(0.41)
DIRECTV:	31.00	0.33	AOL:	23.78	(0.14)
DISH:	18.66	(0.04)	APPLE:	207.88	1.94
DISNEY:	29.32	(0.34)	ARRIS GROUP:	10.49	0.07
GE:	16.30	(0.05)	AVID TECH:	12.64	0.04
NEWS CORP:	14.90	(0.11)	BIGBAND:	3.08	(0.02)
<b>MSOS</b>					
CABLEVISION:	25.68	(0.41)	BLNDER TONGUE:	1.09	0.00
COMCAST:	15.85	0.15	BROADCOM:	28.71	0.07
COMCAST SPCL:	15.25	0.18	CISCO:	23.15	0.25
GCI:	6.09	0.09	CLEARWIRE:	6.60	(0.14)
KNOWLOGY:	11.32	0.44	COMMSCOPE:	28.45	0.13
LIBERTY CAPITAL:	24.26	0.02	CONCURRENT:	4.34	0.45
LIBERTY GLOBAL:	25.43	0.02	CONVERGYS:	10.81	(0.25)
LIBERTY INT:	10.89	0.23	CSG SYSTEMS:	18.82	1.07
MEDIACOM:	4.13	0.12	ECHOSTAR:	18.88	0.03
RCN:	10.09	0.39	GOOGLE:	542.10	(0.32)
SHAW COMM:	18.80	(0.08)	HARMONIC:	6.13	(0.03)
TIME WARNER CABLE:	43.62	(0.54)	INTEL:	20.24	0.24
VIRGIN MEDIA:	14.87	(0.98)	JDSU:	8.25	0.06
WASH POST:	446.60	5.41	LEVEL 3:	1.38	(0.05)
<b>PROGRAMMING</b>					
CBS:	13.30	0.01	MICROSOFT:	29.67	0.17
CROWN:	1.48	0.15	MOTOROLA:	7.40	0.21
DISCOVERY:	30.21	(0.6)	OPENTV:	1.52	0.01
GRUPO TELEVISA:	19.56	0.01	PHILIPS:	31.51	0.56
HSN:	19.29	0.46	RENTRAK:	16.29	0.29
INTERACTIVE CORP:	20.46	0.20	SEACHANGE:	6.46	(0.03)
LIBERTY:	36.38	0.34	SONY:	33.24	(0.26)
LIBERTY STARZ:	47.70	(0.42)	SPRINT NEXTEL:	3.49	0.08
LIONSGATE:	5.45	(0.01)	THOMAS & BETTS:	34.06	0.26
LODGENET:	5.61	0.11	TIVO:	9.60	0.00
NEW FRONTIER:	2.13	(0.02)	TOLLGRADE:	6.38	0.00
OUTDOOR:	5.09	(0.06)	UNIVERSAL ELEC:	24.82	0.06
PLAYBOY:	3.48	0.01	VONAGE:	1.51	(0.01)
RHI:	0.38	0.00	YAHOO:	15.98	(0.01)
SCRIPPS INT:	43.32	(0.69)	<b>TELCOS</b>		
TIME WARNER:	26.95	(0.23)	AT&T:	25.62	0.29
VALUEVISION:	4.32	0.10	QWEST:	4.24	0.01
VIACOM:	31.06	(0.06)	VERIZON:	29.87	(0.3)
WWE:	16.36	0.02	<b>MARKET INDICES</b>		
<b>TECHNOLOGY</b>					
3COM:	7.46	(0.09)	DOW:	10236.16	41.87
ADC:	5.75	(0.11)	NASDAQ:	2221.41	17.68
ADVANTAGE:	2.16	0.01			
ALCATEL LUCENT:	3.44	0.03			
AMDOCS:	29.35	0.10			

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## Think about that for a minute...

### Padding The Record

When I was in grade school, we had a standard method for seemingly adding “heft” to our term papers; we stapled each page to a sheet of “construction paper.” That way your report was big, heavy and impressive looking. For reasons we could never quite figure out at the time, our teachers still graded based on the quality of thought, knowledge and content, not weight.

Now comes the era of “transparency” in government, and efforts to “open up” the system to anyone who wants to participate in rulemaking proceedings and inquiries. Nothing wrong with that. There are “open meetings” everywhere and new web site designs to make sure anyone who wants to can have a say. The result; the Commission just counted well over 100,000 “comments” in the “net neutrality” rule-making proceeding.



**Steve Effros**

Was this a new, revolutionary, useful way for the government to get data upon which to develop its “expert” opinion? Well, it sure isn’t new. Just the means by which a lot of the comments were solicited and transmitted, via the Internet, was new.

Many years ago the Commission started looking at possible different uses for the broadcast spectrum, just as they are today. But back then a rumor started circulating: the government was allegedly going to take away the broadcast spectrum being used by religious broadcasters. The word went out. The Commission got bombarded. There were so many letters decrying and vilifying the FCC for planning to destroy religious broadcasting that the mail room couldn’t handle the load. An office in the FCC building was commandeered. Mail bags full of the poison pen letters were just thrown in and piled to the ceiling. It took years for the alleged “outlawing” of religious broadcasting rumor to finally die.

And today, the “word” had gone out again: someone,

somewhere, has a nefarious plan to “take over” the Internet. They are going to block access to Websites they don’t like, either politically, religiously, or for whatever other reason. They will block any other commercial venture on the Internet that challenges their own, and they will do it all, of course, because they are big.

The “cards and letters” are flowing into the FCC again—this time supporting various regimes of regulation and in most cases displaying very little appreciation for the fact that the issue of network management—what is “reasonable,” what is “unreasonable,” what will help new applications and what might result in their demise—is extraordinarily complicated.

I am just going to have to trust, for the moment, that the Commissioners of the FCC are smart enough, just like my teachers were, to not try to justify whatever they choose to do on such absurd measures as how “heavy” the filing is, or how many filings espouse a given point of view. That doesn’t tell us anything other than someone has concluded that volume is equivalent to quality. We could all, of course, play that game and start engineering, especially using the Internet, a torrent of comments, just as happened during the religious broadcasting debacle. If the Commissioners start citing volume as equating somehow to reasoning or knowledge, they will certainly regret the result.

Padding the record is a long-time tradition. But that shouldn’t make the “record” any more persuasive, intelligent or well thought out. These are complicated issues. In most cases, we are exploring articulated “fears” rather than actual protracted conduct. The volume game easily appeals to those who want to exploit fear, but it should do little for those who seriously want to accumulate expertise.

*Steve*

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