

CableFAX Daily™

Tuesday — March 10, 2009

What the Industry Reads First

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Show Business: Cable Show Must Go On

With mounting layoffs and an ailing economy, **NCTA** is hoping to keep attendance slippage for next month's Cable Show (Apr 1-3, DC) at no more than 20%. That would put attendance at about 9600 people vs 12K in '08. 20% seems to be the average drop for shows in these tough financial times, NCTA svp, industry affairs *Barbara York* told **Cfax**. "In my heart of hearts, I am hoping that Washington, DC, is such an attractive venue that a lot of people will decide at the last minute that they can come," she said. With the industry having a heavy East Coast base, NCTA is promoting the fact that execs can come for just a day by taking an **Amtrak** train from NYC or Philly and avoid an overnight stay. It's still too early to have a real sense of attendance figures because many registrations will occur over the next few weeks, but the show appears to be on track for a drop of about 20%, York said. The exhibitor list is pretty much locked up and is also down about 20%. Floor space will drop to about 160K sq ft from 180K last year in New Orleans, for a total of about 300 exhibiting companies. Some companies pulled out in just the past couple weeks, but York doesn't expect many more dropouts. "If the stock market keeps plunging, then I would worry a little bit more," she said. Her estimates don't count attendees for other events, such as **SCTE** Emerging Tech and **WICT's** Leadership Conference, which are taking place during the industry's 1st **Cable Connection** week (Apr 1-7). Attendees to those events do not get admittance to Cable Show sessions, but they can visit the show floor. The number of concurrent events has resulted in a reduction of sessions for NCTA's big convention, with the number dropping to 39 from about 50-60 in years past. "This all started not to consolidate to save money, but to save time," York said. "Now it really has become not only about managing time, but managing budgets... What had taken 36 days to go to... is down to less than 10 days. So you're saving 25 days in hotels. 17 airfare trips is now down to 2 trips." New at the show this year is "Broadband Nation"—a name we're assured NCTA chief *Kyle McSarrow* devised long before broadband-focused *Barack Obama* was elected president. The 22K-sq-foot exhibit will be more comprehensive than the "Broadband Home" of year's past—showcasing broadband in urban, suburban and rural areas. Exhibit examples include a doctor's office that is broadband connected to a rural school (ie, if a child gets sick, a school nurse can seek advice from a physician) and a 3-D entertainment theater. Tours are already being scheduled for members of Congress and their staffs. And while Obama was invited, we aren't expecting to share a cup of coffee with him on the floor since he's scheduled to leave for England for the G20 Summit that week. We'll keep our eyes peeled for *Joe Biden* though...

No Foul: The **FCC** Media Bureau denied **AT&T's** complaint that **Cox** is unfairly withholding **Cox-4**, which features **San Diego Padres** games as well as local news and entertainment programming, from its **U-Verse TV** service in San Diego. The complaint centered around the so-called terrestrial loophole. AT&T claimed that Cox withholding the channel, with its exclusive rights to regular season Padres games, was hindering its ability to attract subs. Since the net is terrestrially delivered, federal law does not require Cox to make it available to U-Verse, the Bureau said. How-

The Turner Networks Salute The 2009 Wonder Women and Women to Watch



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3 Great Tributes in One Kicking Off Spring Connection Week



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Washington, DC

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ever, it noted that the Commission does have concern about the withholding of vertically integrated terrestrially-delivered programming from competitors and has initiated a rulemaking to examine potential problems. The rulemaking would be a better place to address the telco's concerns, it said. AT&T plans to appeal the decision to the full FCC.

Ratings: The 2nd-season premiere of **AMC's** "Breaking Bad" delivered 1.7mln total viewers, a 40% increase over Season 1 avg viewers. It scored a 1.2 HH rating. Male 18-49 (613K) viewership rose 50% vs the series premiere. -- Thurs' season finale of **USA's** "Burn Notice" scored a series high among 18-49s (2.74mln), 25-54s (3.07mln) and 6.1mln total viewers.

Broadband Bonanza: The heads of the **NTIA, FCC** and **RUS** will hold a joint meeting Tues to discuss implementation of the broadband initiatives funded by the stimulus bill. The plan includes some \$7bln in grants for broadband growth. The meeting is intended to be the 1st of several public forums on the topic. The likely impact on the bill is probably limited when it comes to cable and the Bells, though it could help smaller players, including RLECs, **Stifel Nicolaus** said. "More significant may be the collateral impact of various programs to stimulate demand, particularly the moves to an electronic health record system and a smart grid," the firm said in a note to clients. **Free Press** and the **Open Internet Coalition** joined with former Republican congressman **Chip Pickering** (MS) on a call with reporters Mon to talk about their feelings on the program. Not surprisingly, they are pretty pleased with the non-discrimination portions of the bill.

VOD: **FiOS TV** reached VOD deals with **Turner Nets** and **Sony**, providing it with VOD content from **Adult Swim, Boomerang Cartoon, CNN, TBS, TNT, truTV** and **TCM**. The Sony pact gives the **Verizon** service more recent film releases in HD, including "Pineapple Express" and "Hancock." -- **Time Warner Cable** and **Bright House** have launched **Primetime On Demand**, featuring a variety of shows from broadcasters and cable nets including **CBS, NBC, USA** and **FX**. Eps appear on the channel as soon as the day after their original air date, and remain on the service for up to 4 weeks at no additional charge to subs. Other nets and series will be added later. -- **CBS Sports, CBS College Sports** and the **NCAA** are partnering with more than 20 distribution partners including **Comcast, DirecTV** and **FiOS TV** to deliver **NCAA VOD: The Best of March Madness** (HD and SD).

Competition: **AT&T** has launched its **U-verse** 3-play in Midland and Odessa, TX.

Technology: **ThisTech** has licensed for use by **CableLabs'** Metadata project a software platform that will be the reference and 1st implementation for translation between CableLabs VOD Metadata 1.1 and 2.0 specs. The Metadata project defines business data about VOD distribution, presentation, and multi-platform streaming, allowing MSOs and content providers identify and control their supply of content and ad opportunities. -- **Zodiac Interactive** and **ActiveVideo Networks** are melding certain products to enhance cable ops' provision of Web-related TV experiences while deploying **tru2way** tech, and also plan to develop apps that will facilitate interoperability and transparency across TV services such as linear, VOD, and advanced advertising. -- **Hitachi** and **Pacific Broadband Nets** have agreed to jointly develop Fiber-to-the-Premises solutions for HFC network ops. Both are standards program members of **SCTE**.

Carriage: **Retirement Living TV** was added to **Comcast's** Southeast MI digital basic lineup. -- Canadian ops **Shaw** and **Star Choice** added **Big Ten Network**, making the channel available to 1mln additional subs.

Advertising: Through Mar 15 advertisers will be featured in live streams on **ESPN360.com** of at least 124 college basketball conference tourney games, including simulcasts of every **ESPN** and **ESPN2** men's and women's game. Developed

20th Anniversary of CableFAX Daily



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BUSINESS & FINANCE

by ESPN and **Disney Interactive**, the clickable ads can be accompanied by a display ad that will be coordinated with the commercial in the game window.

Programming: **Nick** bows CG-animated series "The Penguins of Madagascar," which features the characters from the "Madagascar" films, Mar 28, 9:30pm. The series will air in prime for 2 weeks starting Mar 30 before moving to its regular Sat 10am slot Apr 18. -- **TCM** will celebrate its 15th anniversary next month with "fan programmers." 15 fans of the classic movie net will present their favorite films (Apr 13-17). Original '09 productions include a partially animated reflection on the childhood of animator *Chuck Jones* ("Looney Tunes"), Mar 24.

Honors: **NAMIC** announced the recipients of its Next Generation Leaders Awards, which are slated for Apr 3, DC. This year's honorees: **Univision** chief strategy officer and evp *Cesar Conde*, **Bright House** strategic execution officer *Kashif Haq* and **Cox** vp, field info tech *Toni Stubbs*.

Obit: Former **Charter** Central Div pres *Mary White*'s funeral will be held at Blackhawk Evangelical Free Church in Verona, WI, at 11am Tues. In lieu of flowers, friends may consider a donation to the Black Hawk Church.

Business/Finance: **Pali** lowered **Disney** to "sell" from "neutral," in part due to struggling content "compared to [the] past few years."

CableFAX Daily Stockwatch

Company	03/09 Close	1-Day Ch	Company	03/09 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BROADCASTERS/DBS/			AMDOCS:	15.83	(0.37)
BRITISH SKY:	23.68	(1.25)	AMPHENOL:	22.96	(0.73)
DIRECTV:	19.01	(0.67)	APPLE:	83.11	(2.19)
DISH:	9.24	(0.03)	ARRIS GROUP:	6.23	(0.14)
DISNEY:	15.59	(0.24)	AVID TECH:	8.70	0.03
GE:	7.41	0.35	BIGBAND:	5.00	0.21
HEARST-ARGYLE:	1.47	(0.27)	BLNDER TONGUE:	1.00	(0.05)
NEWS CORP:	5.65	(0.29)	BROADCOM:	16.18	(0.79)
MSOS					
CABLEVISION:	9.47	(0.88)	CISCO:	13.62	(0.56)
CHARTER:	0.02	0.00	CLEARWIRE:	2.93	0.11
COMCAST:	11.22	(0.41)	COMMSCOPE:	7.55	0.32
COMCAST SPCL:	10.43	(0.46)	CONCURRENT:	2.85	0.03
GCI:	3.78	(0.33)	CONVERGYS:	5.56	(0.14)
KNOLOGY:	3.82	(0.11)	CSG SYSTEMS:	12.51	(0.81)
LIBERTY CAPITAL:	4.49	(0.3)	ECHOSTAR:	13.99	(0.7)
LIBERTY ENT:	16.81	(0.24)	GOOGLE:	290.89	(17.68)
LIBERTY GLOBAL:	9.37	(1.02)	HARMONIC:	4.59	0.00
LIBERTY INT:	2.46	(0.04)	INTEL:	12.55	0.14
MEDIACOM:	3.01	(0.47)	JDSU:	2.21	(0.07)
SHAW COMM:	13.61	(0.44)	LEVEL 3:	0.68	(0.04)
TIME WARNER CABLE:	6.79	(1)	MICROSOFT:	15.15	(0.13)
VIRGIN MEDIA:	3.87	(0.24)	MOTOROLA:	3.12	0.02
WASH POST:	307.50	(15)	OPENTV:	1.25	(0.01)
PROGRAMMING					
CBS:	3.09	(0.22)	PHILIPS:	13.98	(0.55)
CROWN:	1.28	(0.34)	RENTRAK:	9.20	(0.29)
DISCOVERY:	14.49	(0.63)	SEACHANGE:	4.32	0.00
EW SCRIPPS:	0.72	(0.07)	SONY:	17.58	0.33
GRUPO TELEVISA:	10.92	(0.3)	SPRINT NEXTEL:	3.12	0.08
HSN:	4.15	(0.14)	THOMAS & BETTS:	20.21	(0.13)
INTERACTIVE CORP:	13.46	(0.65)	TIVO:	6.15	(0.35)
LIBERTY:	18.02	(0.11)	TOLLGRADE:	5.60	0.00
LODGENET:	0.58	(0.03)	UNIVERSAL ELEC:	15.72	(0.03)
NEW FRONTIER:	1.20	(0.12)	VONAGE:	0.38	0.00
OUTDOOR:	5.50	0.00	YAHOO:	12.66	(0.39)
PLAYBOY:	1.20	0.01	TELCOS		
RHI:	1.40	(0.86)	AT&T:	21.72	(0.86)
SCRIPPS INT:	18.62	(0.39)	QWEST:	2.89	(0.3)
TIME WARNER:	7.10	(0.37)	VERIZON:	26.18	(1.1)
VALUEVISION:	0.31	(0.04)	MARKET INDICES		
VIACOM:	14.62	(0.59)	DOW:	6547.05	(79.89)
WWE:	9.31	(0.22)	NASDAQ:	1268.64	(25.21)
TECHNOLOGY					
3COM:	2.13	(0.02)			
ADC:	2.77	0.13			
ADDVANTAGE:	1.30	0.00			
ALCATEL LUCENT:	1.13	(0.03)			



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EYE ON ADVERTISING

In the brave new world of television advertising, companies are working more closely than ever with cable networks to create targeted promotions. Take Ask.com, which next week will launch a screen-crawl campaign on networks including the Turner troika of TNT, TBS and truTV. The crawls, which will debut during the “Law & Order,” “Everybody Loves Raymond/King of Queens” blocks and during other programming, will pose questions related to the show and direct viewers to Ask’s Web site for the answer. Katherine Johnson, svp of Turner entertainment promotions and marketing, tells Cathy Applefeld Olson about the campaign’s added benefits and answers the most burning question of all: Will it turn off viewers?



Would you say advertisers are approaching you with more creative ideas these days than in the past?

KJ: Absolutely. There is no doubt as our business changes—and particularly now with the new metrics in place—it’s become even more critical for clients to think about new ways of getting their message across. They are coming up with different ideas, and sharing with us earlier their own objectives and asking us to help further those objectives.

It sounds like a much more collaborative environment.

KJ: It definitely is. And you always get the best results when it’s a collaborative effort. I’ve been doing this for a really long time, and I’m a big believer that when you have different minds thinking and different people in different functional areas working together, you always get a better result.

Which brings us to the new Ask.com screen crawl campaign. How’s it going to work?

KJ: We’ll be running these unique program crawls which help drive people to Ask.com. On truTV you might see a

criminal who did something silly when stealing a car on “TSG Presents World’s Dumbest” and the crawl might ask how many cars are stolen in the U.S. each year. For “Law and Order” on TNT, the questions will relate to one of the characters. They might ask how long a character has been on the show or how many crimes they’ve solved, and the viewer has to go to Ask.com to find out the answer. The nice reciprocal piece is that when they get to Ask.com, viewers will be [directed to the Web site for] one of our networks. That’s what makes this such smart co-marketing. A client like [Ask.com] can take advantage of reaching our television viewers and on the flip side it’s an opportunity for us to interact with viewers online.

Any concern the campaign may turn off viewers?

KJ: We’ve done trivia in this kind of format before and it’s worked well. But we’re always careful to make sure we are not disrupting the viewing experience. We think we figured out a way to deliver these pieces in a respectful way that adds something rather than detracts. We are very comfortable with it, but we’ll be making sure viewers feel the same way.

What other collaborative campaigns have found their way to Turner recently?

KJ: We launched this week a really tremendous consumer promotion around [TNT’s] Trust Me with Dove Hair Care. There’s a big online component... and [Tuesday night] we’ll have a big game show integration throughout the entire show. That’s another great example of a really collaborative partnership with another client, and as we move forward our clients will be wanting to customize more campaigns and asking for our cooperation.

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



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