

CableFAX Daily™

Thursday — March 15, 2012

What the Industry Reads First

Volume 23 / No. 050

NAMIC Chief: Nicol Turner-Lee Tapped to Head Association

NAMIC went outside the programming and MSO world for its new head, with multiple sources telling **CableFAX** that *Nicol Turner-Lee* will become the pres/CEO of the association. NAMIC had no comment. She most recently served as vp and dir of the **Joint Center for Political and Economic Studies' Media and Technology Institute**. Before that, she was with **One Economy**, a nonprofit aimed at using tech and info to expand opportunities for low-income individuals. The search for a new NAMIC head has been underway since Oct when NAMIC pres *Kathy Johnson* stepped down at the conclusion of the organization's annual conference. Turner-Lee has been spotted at multiple industry events in recent weeks, including **Comcast's** launch event in DC for upcoming minority owned nets. Not unusual given her work in media, but get ready to see a lot more of her. She has a doctorate in Sociology from Northwestern and a certificate in nonprofit mgmt from the Univ of IL-Chicago, and has a well-regarded reputation on the policy side of the industry. Her background includes the founding of Chicago-based **Neighborhood Technology Resource Center**, which provides public access to computers and the Internet to low- and middle-income people. Last year, **Alliance for Women in Media** named her one of the 60 most inspiring women in media today.

Group Therapy: For years, **ACA** has complained about the injustice it sees in the retrans consent process. At its annual Summit in DC Wed, members had the satisfaction of knowing some broadcast attorneys were listening. Of course, they had to as part of ACA's retrans panel. One after another, ACA members stood up to talk about their plights—from being a 4K-subs system that feels it has no leverage in negotiations to receiving requests to commence retrans negotiations 2 weeks before a Dec 31 deadline. No peace talks were brokered. No olive branches extended. But some insight was shared. "It may be cold comfort, but the broadcaster has a lot of interest in reaching a deal with you," said *Scott Flick* of **Pillsbury, Winthrop, Shaw, Pittman**. "A broadcaster wants competitors alive. It would be idiotic for a broadcaster to fee you out of existence because their ability to get money from the people you compete with just dropped." Groans could be heard in the audience of independent operators. Streaming is an issue that further muddies retrans consent, with networks making a wide range of programming available for free on the Internet (that worked to **Time Warner Cable's** benefit in Corpus Christi where it has been without an **NBC** affiliate since Dec 13, including on Super Bowl Sun). "We're seeing the impact of the Internet on the marketplace, and the industry is trying to respond to it. There is a lot of experimentation going on. These are the things that make the negotiations increasingly complicated," said *Antoinette Cook Bush*, who reps broadcasters as a partner at **Skadden, Arps, Slate, Meagher & Flom**. Cable was represented on the panel as well. It had to please *Matt Polka* and crew to hear Time Warner Cable vp, reg affairs *Cristina Pauze* praise the association. "Kudos to ACA, which has been the party on this issue for many, many years until some of the rest of us distributors caught up," she said. One sentiment repeated by broadcasters—and by **FCC** chmn *Julius Genachowski* earlier in the day—is that it didn't seem like there were many retrans consent related



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blackouts at the end of '11. But ACA chairwoman *Colleen Abdoulah* (CEO of **WOW!**) later told reporters that blackouts are only one barometer of retrans. "Competitively, you have no choice... If your competitor has this product, you have to have it," she said. Polka also said more members dropped out-of-market stations than ever before, blaming prices as well as network policy. And ACA continues to believe retrans reform is making progress, citing the FCC's media ownership review, retrans NPRM and legislation introduced on the Hill. Even Genachowski told the crowd that the Commission is open to talking to small ops about how they are being impacted—though he raised the authority caveat. "We have heard very clearly from cablecos and consumers that they are concerned about what's happening. Our authority is very limited to revise the way this system works," he said. "The more there are blackouts and complaints, the closer we get to reform. We don't have a clear picture regarding the kinds of deals that were signed."

In the States: **Clearwire** inked a 5-year wholesale agreement with **Cricket Comm**, which plans to cover approx 25mln POPs with LTE tech this year. -- **Buckeye CableSystem** agreed to launch **Arris'** Whole Home Solution, ConvergeMedia VOD platform and ServAssure network monitoring system.

Carriage: **Suddenlink** and **AMC Nets** quashed their fee dispute by reaching a long-term carriage agreement in principle covering **AMC**, **IFC**, **Sundance** and **WE tv**. The deal comes ahead of Sun's season finale of "Walking Dead" and Mar 25 return of "Mad Men" on AMC. -- **Outdoor Channel** renewed its SD/HD deal with **AT&T U-verse TV** for carriage on the telco's Sports Pack and U450 tiers.

On the Hill: Sen Antitrust subcmte chmn *Herb Kohl* (D-WI) announced **Comcast** evp *David Cohen* and **Verizon** general counsel *Randal Milch* as set to testify during next week's hearing on the VZ-cable tie-ups. Others to testify include **Rural Cellular Assn** CEO *Steven Berry*, **Columbia** law professor *Timothy Wu* and **Free Press** policy advisor *Joel Kelsey*.

Multiplatform: **Cablevision** officially launched **HBO Go** and **Max Go** for its digital subs. The MSO now features access to 12 mobile programming services, all of which it spotlights through fresh portal optimum.net/TVtoGo. -- **Discovery Comm** licensed myriad content to **Amazon** for online streaming. Prior seasons of series and specials including **Discovery Channel's** "Dirty Jobs," **TLC's** "Say Yes to the Dress" and **Animal Planet's** "Whale Wars" are part of the deal, as is content from **Investigation Discovery**, **Science** and **Military Channel**. More than 17K titles are now available for streaming via Amazon. -- **Aereo** began accepting sign-ups Wed for 90-day free trials of its online TV platform in NYC, but the service isn't yet available. Embroiled in litigation with broadcasters, the company said it will soon roll out invitations for access more than 20 broadcast channels, 40 hours of remote DVR storage and usage on up to 5 devices. -- **FremantleMedia Enterprises** inked with **Hulu** a 1st look deal for intl distribution rights of the site's original series across all global platforms. *Morgan Spurlock's* doc series "A Day in the Life" is part of the deal.

Upfronts: It's been a good year for **Disney**, so there was revelry in the air at this year's NYC Upfront. **Disney XD** has shown ratings growth for 38 consecutive months among kids 6-11, **Disney Channel** was number 1 in kids 6-11 (finally beating out **Nickelodeon**) and the 24-hour channel for tots, **Disney Jr**, will launch March 23. The event was attended by scores of advertisers—and as many kids. Excitement on the Radio Disney-led dance floor reached a fever pitch when Disney Channel actress *Debby Ryan* joined the crowd of kiddos, and a little later, it was dance move central when A.N.T. Farm star *Chine Anne McClain* and her sisters took the stage. But before the fun-filled festivities began, **CableFAX**

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Wednesday — January 11, 2012 What the Industry Needs First Volume 23 / No. 006

OTT Musings: Stakeholders Debate Evolving Content Delivery at CES

With the Comcast/Disney distribution deal a harbinger for TV Everywhere and Fox's move last summer to put select content behind a pay wall, panelists mulled the ins and outs of over-the-top delivery at an OTT panel at CES. "The tablet, the device, is going to control the TV experience at U-verse," said Jeff Weber, AT&T VP, product and strategy, noting the company's drive into tablet apps and model of providing APIs for developers to send content from device to television. But discernment is critical, panelists agreed. While AT&T has an approval process in place, YouTube abandoned its API-based partnership model two years ago "because we ended up with different apps on diff TV, and performance differed," said Francisco Valera, dir/global head of platform and games partnerships. Touting YouTube's deals with Samsung, LG and its new Xbox partnership, "If we can't control the app, and update features quickly, it's a lost cause," he said. YouTube's recent-day model of investment in original content will stretch the company's presence in specific categories such as "niche cooking and unique travel" channels. "We don't see ourselves becoming a large studio, but we're more than dogs on skateboards," Valera quipped. "We want to bring in proven providers of broadcast quality content that's not sustainable in the cable universe." Valera said YouTube is working on its fourth UI, and moving toward the HTML5 standard. Noting that unlike other video distributors YouTube always owns its TV and mobile content rights, "Can we bring our content to an AT&T, Cox or Comcast? We can, and that's where we are excited," he said. Initial deals with distributors are rolling out in Europe and Asia, he said. At Cox, focus remains on the UI. "It's important to get the user interface right, especially as more content is added in," said Lisa Pickelsimer, executive director, video product development. Integrated search, recommendations and social media will become more key, Pickelsimer said, noting the bigger role of metadata and the need



STYLE MEETS SUBSTANCE

THE STYLE

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- ★ Focus on successful case studies and top trends of the industry's best PAR companies
- ★ Demonstrations of organizational value and measurable return from PAR policies

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BUSINESS & FINANCE

sat down with Disney execs to chat business. Said pres/chief creative officer *Gary Marsh*: "Obviously our record ratings allows us to take bigger swings." Disney evp, sales & mktg *Rita Ferro* said that advertisers are taking notice. "For the first time we're the leaders in the marketplace," she said. "We're being engaged early on in the process, we're being approached first." She said multi-platform remains key. And with the creation of 24-7 Disney Jr for 2-5-year-olds, svp/gm *Nancy Kanter* cited an "opportunity to reach moms during the later part of the day" as well as kids. -- **Hallmark Channel** used its Upfront to announce that its 1st original series are in dev for '13 premieres. Movie pilots for "Cedar Cove" and "When Calls the Heart" will air during the '12-'13 season. The former is adapted from *Debbie Macomber's* original literary works, and the latter's a period drama based on a *Janette Oke* novel. Daytime on the net in 4Q will include new talk show "Marie!," starring *Marie Osmond* and 2-hour lifestyle series "Home & Family," which will originate from a **Universal Studios** lot and feature topics ranging from child care to crafts. Also, Hallmark has cleared dev for 28 original movies to premiere from 4Q12 to 3Q13. **Hallmark Movie Channel**, meantime, will up its prod slate to 9 original movies for premiere during the same window. Included: *Luke Perry* in the latest iteration of "Goodnight for Justice" and "Queen of Hearts," starring *Ricky Schroder*.

CableFAX Daily Stockwatch

Company	03/14 Close	1-Day Ch	Company	03/14 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
DIRECTV:	47.81	0.01	CLEARWIRE:	2.19	0.04
DISH:	31.38	(0.21)	CONCURRENT:	3.54	(0.16)
DISNEY:	43.48	(0.53)	CONVERGYS:	12.49	(0.18)
GE:	19.79	0.20	CSG SYSTEMS:	16.09	(0.11)
NEWS CORP:	20.28	(0.01)	ECHOSTAR:	28.64	(0.06)
MSOS					
CABLEVISION:	14.73	(0.14)	GOOGLE:	615.99	(1.79)
CHARTER:	63.11	0.22	HARMONIC:	5.61	(0.39)
COMCAST:	29.79	(0.26)	INTEL:	27.46	(0.03)
COMCAST SPCL:	29.24	(0.26)	JDSU:	13.70	(0.21)
GCI:	10.43	(0.01)	LEVEL 3:	24.93	0.91
KNOWLOGY:	18.25	(0.1)	MICROSOFT:	32.77	0.10
LIBERTY GLOBAL:	51.26	(0.33)	MOTOROLA MOBILITY:	39.69	(0.1)
LIBERTY INT:	18.98	(0.13)	RENTRAK:	20.16	(0.37)
SHAW COMM:	20.36	(0.41)	SEACHANGE:	7.86	(0.04)
TIME WARNER CABLE:	80.60	(0.4)	SONY:	21.59	0.45
VIRGIN MEDIA:	24.73	(0.38)	SPRINT NEXTEL:	2.77	(0.02)
WASH POST:	395.27	(4.38)	THOMAS & BETTS:	72.00	(0.02)
PROGRAMMING					
AMC NETWORKS:	46.04	0.08	TIVO:	11.26	(0.29)
CBS:	31.43	0.10	UNIVERSAL ELEC:	19.56	(0.25)
CROWN:	1.33	0.03	VONAGE:	2.23	0.07
DISCOVERY:	47.91	(0.24)	YAHOO:	14.63	0.08
GRUPO TELEVISA:	20.90	(0.23)	TELCOS		
HSN:	37.57	(0.33)	AT&T:	31.45	(0.18)
INTERACTIVE CORP:	49.10	(0.24)	VERIZON:	39.47	(0.01)
LIONSGATE:	13.49	(0.22)	MARKET INDICES		
LODGENET:	3.58	0.02	DOW:	13194.10	16.42
NEW FRONTIER:	1.29	(0.01)	NASDAQ:	3040.73	0.85
OUTDOOR:	7.69	(0.15)	S&P 500:	1394.28	(1.67)
SCRIPPS INT:	47.04	(0.64)			
TIME WARNER:	35.98	(0.54)			
VALUEVISION:	1.84	(0.1)			
VIACOM:	53.30	(0.86)			
WWE:	8.90	(0.06)			
TECHNOLOGY					
ADDVANTAGE:	2.29	0.12			
ALCATEL LUCENT:	2.39	0.02			
AMDOCS:	30.54	(0.35)			
AMPHENOL:	57.32	(0.68)			
AOL:	17.90	0.06			
APPLE:	589.58	21.48			
ARRIS GROUP:	11.12	(0.13)			
AVID TECH:	10.66	(0.31)			
BLNDER TONGUE:	1.33	(0.02)			
BROADCOM:	36.85	(0.54)			
CISCO:	20.20	(0.03)			



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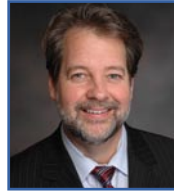
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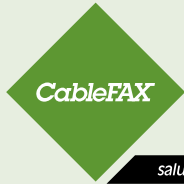
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Pre-Announced Winners

Launch Team of the Year

- Knology of Kansas - The Give and Get of Sales

Out of Box: The Relentless

- Helen Hauser - Ovation

Out of Box: The Renewer

- Mark Romano - Outdoor Channel

Out of Box: The Woo-er

- Chris Ozminkowski - BBC America

Regional Sales Person of the Year

- Allison Clarke - AMC Networks
- Ivan Bagueiras - Discovery Networks Latin America/US Hispanic

Finalists

Affiliate Sales Person of the Year (Below the VP Level)

- Holly Mauer - Crown Media Family Networks
- Sara Timmins - RLTV

Affiliate Sales Person of the Year (VP Level and Above)

- Deanna Andaverde - Univision Communications Inc
- Bradley Fleisher - NBCUniversal
- Laura J. Lee - Crown Media Family Networks
- Michelle Rice - TV One
- Brent Scott - Scripps Networks Interactive
- Michael Smith - HSN

Affiliate Sales Team of the Year (Emerging and Mid-Size Networks)

- Outdoor Channel
- RLTV
- TV One

Affiliate Sales Team of the Year (Large Networks)

- MLB Network
- TV Guide Network
- Turner Network Sales

Brand Integration Team of the Year

- Discovery's Branded Entertainment Team - Discovery Networks Latin America/US Hispanic

- Scripps Networks Interactive Ad Sales & Marketing Team - Scripps Networks Interactive

Most Creative Program Sold to Client

- Food Network & DoubleTree by Hilton Hotels
- HGTV & Pulte Homes

Most Creative Sales Pitch

- Discovery Communications - Velocity Launch Party in New York City
- GMC - TV 2011 Upfront Presentation
- HGTV & Sears - All-American Handyman

National Sales Person of the Year (Below the VP Level)

- Casey Gould - Crown Media Family Networks
- Graig Hale - Sportsman Channel
- Brian Napolitano - Ovation
- Jeff Rohr - Comcast Media Center

National Sales Person of the Year (VP and Above)

- Ed Georger - Crown Media Family Networks
- Liz Janneman - Ovation
- Greg Regis - Scripps Networks Interactive
- Peter Wright & Melissa Drucker - BBC Worldwide Limited

National Sales Team of the Year

- Ovation
- Crown Media Family Networks
- Discovery Communications

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Think about that for a minute...

Do The Math!

Commentary by Steve Effros

There are times when no matter how hard you try, just explaining business models and technical realities simply won't work. Aside from using blunt force (which has been tempting on occasion!) usually what works best with folks who still can't or won't accept the notion that "...there's no such thing as a free lunch" is to sit them down and do the numbers.



That's what I wind up doing in extended conversations with reporters about the notion of a la carte programming. Sounds good, until you "do the numbers" and figure out what a channel like ESPN would have to charge to reach equivalent revenue to what they're making now.

I'm not going to get into the argument over whether that revenue is too high, too low, or whatever. The point is that when folks are walked through the numbers and appreciate that one a la carte channel might cost more than \$20, they finally start hearing that things are not as simple as they might at first seem.

Unfortunately, some of the most widely read reporters from major newspapers have not yet, apparently, understood these basic truths. Case in point; Cecilia Kang and J.D. Harrison of the Washington Post.

In a major piece in the Post on the rollout of the "new iPad," here's what they said:

"With the new iPad, users would be able to go to network Web sites and watch their favorite shows in high definition for free. Some consumers may be more willing to cut the cord to their cable service."

It's hard to know where to start with this one! "FREE"? What the heck are they talking about? Change the size of the screen and get the signal over a 4G/LTE connec-

tion on that new snazzy iPad and suddenly your favorite shows are free? That's going to come as one heck of a surprise to the folks who own (and charge for) those shows! It's also forgetting any cost for the delivery.

Let's just do the numbers, here. Verizon charges \$30 per month for 2GB of connectivity on the iPad. One hour of HD streamed programming to that iPad uses about 2GB. So let's see, if the average person cuts the cord and watches the same amount of television (Nielsen says its over 5 hours a day, but let's use 4) that's 120 hours, or 240GB of data. Now you might squeak under some broadband "caps" at that usage, so long as you didn't do much of anything else, but if everyone started doing that you could be sure the ISPs would have to charge more because of all the capital costs they would be incurring to rebuild the network. It's simply not designed for that volume.

And as for that Verizon bill... let's see, \$30 per 2GB (oh, I know, they'd have some volume discounts, but it's so much fun when the bill goes into the thousands per month!) Free? And that's not counting the price of the programming! What are these folks thinking?

How any serious reporter could have been lulled into the idea that tweaking the technology could somehow suddenly change the cost of both the programming and the delivery is beyond me.

They gave one hint. In an earlier paragraph they said the problem is the "cable giants" have a "grip" over the market for on-demand content! Think they've heard of Hulu, Vudu, Netflix, Amazon, iTunes, etc? They all offer on-demand content right now. There's a much simpler answer than looking for villains: do the math.

Steve

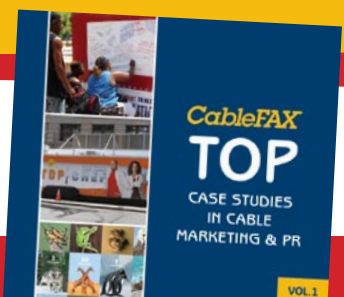
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(Steve Effros was President of CATA for 23 years and is now an advisor and consultant to the cable industry)

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