

# CableFAX Daily™

Wednesday — March 19, 2008

What the Industry Reads First

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## Boston TiVo Party: Rogers Touts TV Broadband, Cable Partnerships

TiVo's feeling pretty good about New England. Not only is it the site of its first commercial rollout with **Comcast**, but **Cox** announced earlier this month that it will be the site of its 1st co-branded launch (*Cfax*, 3/7). "Surveys that we've done in Boston show far greater awareness of TiVo and the TiVo brand, even with the limited amount of press and marketing Comcast has put behind it so far," TiVo CEO *Tom Rogers* said during a **Citi** investor conference Tues. He expects Comcast to begin marketing the \$2.95 add-on service more extensively in the coming months once "bugs and automatic processing issues" are worked out. While Rogers was bullish on cable partnerships, he spent much of his presentation heralding TiVo as a one-stop device that can do it all. "A year ago, we were hearing that people would never attach their TVs to broadband. Now we find that about 85% of HD TiVo buyers before we even market to them... are immediately taking it out of the box and connecting to broadband," he said. TiVo announced Tues that an updated version of its "Desktop Plus PC" software is now available that lets viewers watch video content from the Web directly on their TVs (the service was announced in Jan at **CES**). Rogers was less enthralled with **EchoStar's Slingbox** technology. "Place shifting has some appeal. I don't think anybody does it yet quite friction-free to make it truly appealing," he said. "Right now, there doesn't seem to be as big a consumer opportunity as some initially thought." TiVo lets user download content to iPods, schedule recordings via a **Verizon** phone, and is exploring other place-shifting services under its "TiVo to Go" brand. Meanwhile, Rogers was insistent that TiVo will prevail in its patent case with EchoStar. On Mon, **DISH Network** asked a federal appeals court to rehear the case, claiming that a TiVo witness provided contradictory testimony.

**Sold!:** The **FCC's** spectrum auction came to close Tues, with a record \$19.6bln in bids. FCC chmn *Kevin Martin* credited anonymous and package bidding rules, as well as altered power limits on the A- and B-blocks, to the auction's overall financial success. But as expected, the D-block designed to help free up more public-safety spectrum didn't attract the minimum bid required by FCC auction rules. In a conference call late Tues, Martin said the Commission will "evaluate our options" concerning the D-block but said a public-private partnership seems to remain "the only tool we have at the Commission to try to solve these challenges." The FCC won't disclose the winners of the auction until commissioners vote to officially close the process; that order was circulated by Martin immediately after the last round ended Tues. **Stifel Nicolaus** predicted that **Verizon Wireless** and **AT&T** will be the auction's biggest acquirers of spectrum. Meanwhile, controversy continues to swirl around the auction process, with House Telecom chmn *Ed Markey* (D-MA) announcing plans for a hearing on the auction results partly "to ascertain the extent to which new entrants have succeeded in obtaining licenses through this auction." He also wants to delve into reviewing a new auction for the D-block and whether a high reserve price needs to continue to exist. **Public Knowledge** pres/co-founder *Gigi Sohn* similarly called for an investigation of whether certain D-block conditions repelled bidders. But she said open-access

# French Connection

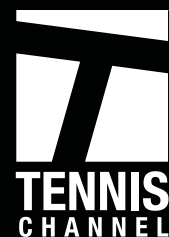
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provisions—limited by the FCC to the C-block portion—created “some good results for consumers” even if the scope of the open-access rules “weren’t all that we would have liked.”

**Switch-a-roo: Cablevision** is ramping up the number of channels it makes available via a switched digital network. CableCARD customers have started receiving notification that the MSO is moving the **VOOM HD** networks to switched over the next couple months. The change means that CableCARD users will need an HD set-top to continue to receive the channels. Cablevision is offering them a free box for a year. Switched digital delivers linear digital channels only when viewers tune in to them, freeing up bandwidth. Impacted channels include: **Animania HD, Equator HD, Family Room HD, Film Fest HD, Gallery HD, Gameplay HD, HDNews, Kung Fu HD, Monsters HD, Rave HD, Rush HD, Treasure HD, Ultra HD, Worldcinema HD** and **Worldsport HD.** Cablevision entered the world of switched digital in '06 by launching 60 intl channels across its footprint (the number has now grown to about 70).

**DTV Doings:** Cable chimed in at the **FCC** this week to bash broadcasters' proposal that a station's digital HD and SD signals appear on the same channel for customers. **NCTA** said it's generally impossible to put both versions on the same virtual channel, while **NAB** and **MSTV** assert that it would be possible on most digital systems. The cable group also argued in reply comments that same-channel placement is unnecessary, noting that many subs want HD channels grouped together and that such a rule would require confusing changes to customers' lineup.

**Downtimes:** One strategy for building your business during an economic downturn is to give customers some stability. That's what **WOW!** has done by introducing a bundle offer with a rate that customers can lock into through '10. “What we're finding is that people really appreciate that, especially during hard times. They appreciate knowing what their billing is going to be,” **WOW!** chief **Colleen Abdoulah** said during **CableFAX's** digital Webinar series Tues. “Be clever about rates,” **Atlantic Broadband** CEO **Dave Keefe** concurred. **WOW** takes on the burden of the guaranteed rate as there's no contract or penalty if a customer leaves before '10. **Cox** svp **Tony Maldonado** noted that a slowing economy doesn't necessarily equal a downturn in **Cox's** business. “We think less about doing business in a recession and more about... being smart, purposeful and disciplined” in good times, he said. Purchase a replay of the presentation at <http://www.cable360.net/cfax/webinars/>.

**Competition:** **DISH** quickly countered the news of a Fri satellite launch anomaly by outlining the HD enhancements it has planned for spring. The satcaster expects to increase its local HD offerings by more than 60% over the next 2 months, through Apr launches in 12 markets including Austin and Milwaukee, and 9 May launches in markets such as Richmond and Knoxville. Also, **DISH** still expects to deliver on its year-end goal of 100 local HD markets and 100 national HD channels. A list of potential upcoming net launches includes **USA HD, AMC HD** and **The Weather Channel HD.** -- NH regulators approved Mon the \$2.7bln sale of **Verizon's** land line business in northern New England to **FairPoint Comm**, said FairPoint chmn/CEO **Eugene Johnson** during the company's earnings call. The state's nod effectively ends months of negotiations, as ME, VT and the **FCC** had previously OK'd the deal, which is expected to close Mar 31.

**Ratings:** **WWE's** Mon night show on **USA** last week earned a 4.0/3.83mln two-hour avg in returning to the weekly telecast thrown last week. This week the net (2.2/2.09mln) took the top spot, a typical occurrence. Of the 18 **WWE** content hours on **USA** this year, none has earned a rating below 3.2 or weekly telecast placement below 7th. The



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# BUSINESS & FINANCE

'08 ranges: 3.2-4.1 and 1st-7th.  
 -- Powered by feature film "The Incredibles" (3.0/2.81mln), **Disney** (1.9/1.81mln) notched 2nd position, while **TNT** (1.6/1.56mln) and **Fox News** (1.6/1.53mln) tied for 3rd. **TBS** (1.5/1.48mln) completed the top 5.

**Honors:** *Cox's Pat Esser* and *Life-time's Meredith Wagner* are the recipients of this year's **Association of Cable Communicators** President's Award. They'll be honored at the Beacon Gala in DC, Apr 1.

**People:** **Comcast** promoted its lobbying machine: *Joe Waz* becomes svp, external affairs and public policy counsel. *Kerry Knott* was upped to svp, govt affairs. -- E-commerce firm **RedRoller** named former **Vonage America** pres *Michael Tribolet* CEO. -- **RHI Ent** appointed former **ABC** exec *Henry Hoberman* evp/genl counsel. -- **Oxygen Media** tapped *Michael DuPont* as vp, ad sales.

**Oops:** *Colleen Abdoulah* was named chmn of **WOW!** by **Avista Capital Partners**, not chmn of Avista.

**Business/Finance:** **Outdoor Channel Holdings** OKed a stock buyback program, effective Apr 15, to repurchase up to an aggregate of \$10mln of its issued and outstanding common shares. -- **Comcast's Brian Roberts** (16.3K), *David Cohen* (14.7K), *Steve Burke* (8.6K), *Arthur Block* (1.5K) and *Lawrence Salva* (1.6K) all sold Comcast shares Fri at \$18.92/share, according to a **SEC** filing.

## CableFAX Daily Stockwatch

Company	03/18 Close	1-Day Ch	Company	03/18 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
AMDOCS:	28.15	(0.17)	AMPHENOL:	36.97	2.26
BRITISH SKY:	44.60	2.30	APPLE:	132.82	6.09
DIRECTV:	25.21	0.76	ARRIS GROUP:	5.69	0.24
DISNEY:	31.72	1.26	AVID TECH:	25.26	1.58
ECHOSTAR:	27.77	1.13	BIGBAND:	6.18	0.49
GE:	36.14	1.81	BLNDER TONGUE:	1.41	(0.07)
HEARST-ARGYLE:	21.35	0.55	BROADCOM:	17.60	1.15
ION MEDIA:	1.45	0.00	CISCO:	25.58	1.29
NEWS CORP:	18.71	0.42	COMMSCOPE:	36.75	2.12
<b>MSOS</b>					
CABLEVISION:	21.79	(0.06)	CONCURRENT:	0.63	0.01
CHARTER:	0.84	0.06	CONVERGYS:	15.10	0.61
COMCAST:	19.38	0.53	CSG SYSTEMS:	10.90	0.35
COMCAST SPCL:	18.98	0.51	ECHOSTAR HOLDING:	31.44	(0.82)
GCI:	5.77	0.51	GEMSTAR TVG:	4.64	0.24
KNOLGY:	13.10	1.09	GOOGLE:	439.16	19.29
LIBERTY CAPITAL:	15.07	(0.01)	HARMONIC:	8.39	0.14
LIBERTY ENTERTAINMENT:	22.08	0.36	JDSU:	12.95	0.50
LIBERTY GLOBAL:	35.97	1.17	LEVEL 3:	1.96	0.12
LIBERTY INTERACTIVE:	16.48	0.30	MICROSOFT:	29.42	1.12
MEDIACOM:	4.39	0.21	MOTOROLA:	9.60	0.35
ROGERS COMM:	42.97	0.00	NDS:	51.52	2.71
SHAW COMM:	18.09	0.46	NORTEL:	6.22	0.22
TIME WARNER CABLE:	25.65	0.22	OPENTV:	1.19	0.05
VIRGIN MEDIA:	13.96	0.46	PHILIPS:	39.00	1.57
WASH POST:	669.90	22.90	RENTRAK:	11.14	(0.19)
<b>PROGRAMMING</b>					
CBS:	22.54	0.64	SEACHANGE:	6.89	0.33
CROWN:	4.90	0.18	SONY:	41.85	0.97
DISCOVERY:	20.64	0.42	SPRINT NEXTEL:	5.92	0.26
EW SCRIPPS:	42.92	1.62	THOMAS & BETTS:	35.78	0.78
GRUPO TELEVISA:	22.86	1.30	TIVO:	8.71	0.56
INTERACTIVE CORP:	20.70	0.84	TOLLGRADE:	5.28	0.00
LIBERTY:	1.00	0.00	UNIVERSAL ELEC:	22.34	0.40
LODGENET:	7.67	0.25	VONAGE:	1.74	0.02
NEW FRONTIER:	4.72	0.25	VYYO:	0.65	0.05
OUTDOOR:	6.73	0.41	WEBB SYS:	0.03	(0.01)
PLAYBOY:	8.61	0.35	YAHOO:	27.66	1.81
TIME WARNER:	14.34	0.43	<b>TELCOS</b>		
UNIVISION:	36.23	0.00	AT&T:	36.77	0.98
VALUEVISION:	4.83	0.28	QWEST:	4.71	0.21
VIACOM:	39.38	1.28	VERIZON:	35.22	0.61
WWE:	18.72	0.42	<b>MARKET INDICES</b>		
<b>TECHNOLOGY</b>					
3COM:	2.86	0.17	DOW:	12392.66	420.41
ADC:	12.36	0.60	NASDAQ:	2268.26	91.25
ADDVANTAGE:	3.91	(0.19)			
ALCATEL LUCENT:	5.39	0.25			

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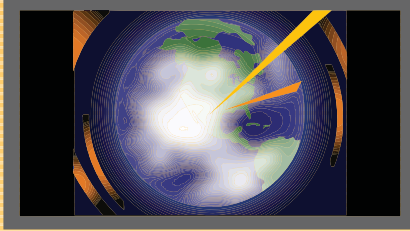
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