6 Pages Today

CableFAX Daily...

Tuesday — March 22, 2011

What the Industry Reads First

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Wireless Shakeup: AT&T's T-Mobile Bid Spotlights Spectrum Grab

AT&T repeatedly underscored Mon how its \$39bln play for T-Mobile USA centers on the acquisition of spectrum to keep pace with exploding mobile data traffic, and shrewdly said it's aligned with the public policy initiatives of the White House and FCC to enhance mobile broadband coverage across the country. But as the telco said the deal would expand its planned LTE buildout into suburban and rural areas and to ultimate coverage of 95% of the US population, it will take quite some time before the FCC and **DOJ** render verdicts on the proposal. In the near-term, it remains all about the spectrum: who has it, who wants it and how the attendant answers might further impact the communications and media industries. Wall St analysts largely tabbed **Sprint** as the clear loser from the deal news, not only because it had also been involved in negotiations with T-Mobile—and apparently lost—but because in a revised wireless world, it could become a 3rd-place also-ran behind 2 behemoths (also **Verizon**). Yet Sprint's loss may be big cable's gain, as many analysts believe the company must now reinvigorate its operations with Clearwire. "It is still in Sprint's interest to see Clearwire succeed, given the size of its investment," said Sanford Bernstein's Craig Moffett. BTIG's Walter Piecyk said the AT&T announcement places Clearwire in a better position. "Sure they lose a potential wholesale partner in T-Mobile... but at the end of the day we believe the AT&T acquisition of T-Mobile was about spectrum, and they have more spectrum than anyone," said Piecyk. "The list of Clearwire suitors is now long." And while AT&T likely reminded cable, save for maybe Cablevision and Cox, of its vastly inferior positioning in the mobile space vis a vis the telcos, Piecyk noted that anyone with spectrum holdings may now benefit. "Cable operators could have some increased pressure to come up with a wireless strategy and now have fewer desperate companies with which to negotiate," he said, but "they own spectrum and own a stake in spectrum-rich Clearwire which might now be in play." Added **Gerson Lehrman Group**: "If a spectrum shortage does emerge on a larger scale than it has until now, the value of unused (SpectrumCo) and poorly used (Clearwire) spectrum should increase." Not surprisingly, a parlor game of speculating on reactionary moves to AT&T/T-Mobile gained great popularity Mon. Sprint may now seek out Leap Wireless or Metro PCS, for example, or Verizon, CenturyLink or even a cable op could swoop in and acquire Sprint and/or Clearwire. "It's possible that Verizon or CenturyLink-Qwest could make a play for Sprint/Clearwire, which would benefit Sprint/Clearwire and also complicate the AT&T/T-Mo merger review, but we see that as unlikely,"



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said **Stifel Nicolaus**. What many analysts do expect to happen shortly is the consummation of a facilities-sharing deal between Sprint and **LightSquared**, which would offer further testament to the arms race developing in the mobile data space. Indeed, comments by AT&T chmn/CEO *Randall Stephenson* inform well on why the telco's acquisition headlines included T-Mobile and not **DirecTV**. Everything is moving toward wireless at a breakneck pace, said Stephenson, and the key to either keeping current or staying ahead of that trend is "first and foremost spectrum, and lots of it." Notable Mon share movements: AT&T (+1.15%), Sprint (-13.61%), Clearwire (-4.35%), Leap Wireless (+15.73%), MetroPCS (+4.76).

At the Portals: Need further evidence of the growth of wireless? Mobile wireless devices and data plans soared 27% in the 1st half of '10 to 71mln, while fixed broadband connections whittled to 1% growth (82mln connections) during the same period. Those stats are from the FCC's latest Internet Access report. Mobile's connections aren't as speedy, however. The number of mobile wireless connections slower than 3Mbps downstream jumped to 65.7mln from 52.9mln in Dec '09. The number of fixed connections slower than 3Mbps decreased by 1% to 26.8mln. Overall, 60% of reportable Internet connects (92.5mln) were slower than 3Mbps in the downstream as of June 30, '10, the report said. 9% (13.6mln) were at least 3Mbps in the downstream, but slower than 6Mbps in the upstream. 31% (46.8mln) were at least 6Mbps in the downstream direction. The FCC has set 4Mbps as the minimum bandwidth needed for today's Internet uses. In a separate local phone report, the FCC said cable's presence in the voice market continues to grow, and it found that interconnected VoIP subscriptions increased by 21% to 29mln in June '10 from 24mln in Dec '09. Retail switched access lines decreased by 8% to 122mln, resulting in an annual decrease of 4% in wireline retail local phone service connections.

<u>AT&T Reax:</u> "With every passing day, wireless services are becoming more and more important to the way we communicate," said **Sen Commerce** chmn *Jay Rockefeller* (D-WV). "So it is absolutely essential that both the **Department of Justice** and the **FCC** leave no stone unturned in determining what the impact of this combination is on the American people." Rep Ed Markey (D-MA) intends "to evaluate the proposed merger of **AT&T** and **T-Mobile** closely with a focus on how it would impact consumers, competition, and choice." **FCC** commish *Meredith Atwell Baker* hopes "the Commission's review will be careful, timely and focused on competitive issues directly related to the proposed transaction." Said **The Hispanic Institute**: "The proposed merger of AT&T and T-Mobile will move us closer to universal mobile broadband deployment. When we consider how essential mobile technology is to empowering communities, we conclude that this proposal is good for Hispanic America."

<u>Deals</u>: Liberty Global will acquire **Kabel BW**, the 3rd largest cable op in Germany (3.7mln homes passed, 2.4mln customers) for approx \$4.5bln. When combined with the existing **Unitymedia** operation, Germany will become the largest Liberty Global European market. Liberty estimated the purchase price at about 8.1X its estimate of KBW's '11 EBITDA. Subject to regulatory approval, it's expected to close in the 2nd half of the year.

<u>In the States</u>: Time Warner Cable and Sinclair may have finally agreed to a retrans consent deal this year, but it isn't same as it ever was. The broadcaster invoked a non-duplication rule that forced the MSO over the weekend to blackout most programming on the **Fox** affiliate in Rochester in favor of the Buffalo Fox affil. The change impacts TWC customers in Genesee, Wyoming, Orleans and Niagara counties in NY, who previously received both Fox affils.

<u>Competition</u>: **FiOS** is offering new customers in Tampa Bay who choose a triple- or quad-play the ability to lock in a higher-capacity, multi-room DVR (typically \$20/month) for free as long as they maintain their FiOS bundle.

<u>Carriage</u>: FIOS TV will launch ESPN 3D by Apr 5, ahead of the net's planned coverage of the Masters and NBA playoffs.

<u>Ratings:</u> After notching YOY total viewership gains of 19% on Fri, 11% Sat and 18% Sun for **March Madness** coverage, **CBS** and **Turner** said the tourney's 1st week averaged 8.4mln total viewers—the highest avg in 17 years. Overall, the tourney has delivered 81.3mln total viewers, up +17% from CBS' '10 coverage, as well as YOY gains among 18-34s (+40%), men 18-34 (+40%), men 18-49 (+23%), men 25-54 (+21%), 18-49s (+18%) and 25-54s (+15%).

<u>On the Circuit</u>: **NAMIC** is applauding the appointment of **NCTA**'s 1st African American pres/CEO, noting that *Michael Powell* championed multi-ethnic inclusion while at the **FCC** by creating the Federal Advisory Committee on Diversity in Communications in the Digital Age. "As we prepare to meet the opportunities presented by America's increasing multiculturalism and the demands prompted by technological advancement, we look forward to working with Mr. Powell on initiatives that are central to fostering multi-ethnic diversity within the communications industry,"

CableFAX Digital Hot List 2011

CableFAX Digital Awards Breakfast April 6, 2011 | 8:30 – 10:30am | Grand Hyatt, NYC

Chris Allen - Starcom

Cathy Avgiris - Comcast Cable

Amy Banse - Comcast Interactive Media

Christopher Barry – Sundance Channel

Nomi Bergman - Bright House

Albert Cheng - Disney/ABC Television Group

Steven Cook - Time Warner Cable

Mark Cuban - HDNet

Jatin Desai - Itaas

Thomas Fishman - MTV

Ron Frankel - Synacor

Jim Gallagher - Charter Communications

Mark Garner - AETN

Robert Gessner - Massillon Cable TV

Mari Ghuneim - Bravo Media

Rebecca Glashow - Discovery

Communications

Marc Goldberg - Epix

Gabi Gregg - MTV

Greg Hickman - WICT

John Higginbotham - Frankfort Power

Board

Sarah Hofstetter - 360i

Rhonda Holt - TBS

Matt Hong - Turner Sports

Lisa Hsia - Bravo Media

Neil Hunt - Netflix

Jeff Huvsar - Fox Sports Interactive

Yvette Kanouff - SeaChange International

Jennifer Kavanagh - Oxygen

Rob Kennedy - C-SPAN

Jason Kilar - Hulu

Patrick Knorr - Knorr Solutions

John Kosner - ESPN

Mike LaJoie - Time Warner Cable

Mark Lapidus - Comcast Sports Net Mid-

Atlantic

Peter Levinsohn - Fox Interactive Media

Paul Leys - OMD / Ignition Factory

Peter Low - Ensequence

Rhonda Lowry - TBS

Tara Maitra - TiVo

Don Mattrick - XBox

Dermot McCormack - MTV

Mac McKean - AMC

Todd Merkow - Outdoor Channel

Stephanie Mitchko - Cablevision Systems

John Najarian - Comcast Entertainment Group

Vikki Neil - Scripps Networks

Lisa Choi Owens - Scripps Networks

Arthur Orduña - Canoe Ventures

JB Perrette - NBCUniversal

Timothy Peters - FourthWall Media

Damon Phillips - ESPN

Clark Pierce - Fox Sports Networks

Jennifer Pirot - NBCUniversal Digital

Distribution

David Preisman - Showtime

Enrique Rodriguez - Cisco

Avner Ronen - Boxee

Jeff Simmermon - Time Warner Cable

Buddy Snow - Motorola Mobility

Michael Spirito - YES Network

Meredith Stark - CNBC.com

Dan Suratt - AETN

Doug Sylvester - Avail TVN

Ritu Trivedi - Mindshare

Nicholas D. Troiano - Black Arrow

Amy Tykeson - Bend Broadband

Aimee Viles - Bravo Media

Tony Werner - Comcast

Michael Willner - Insight

Anthony Wood - Roku

Stephen Youngwood - Nickelodeon

The Digital Hot List will be honored during the April 6th awards breakfast at the Grand Hyatt Hotel in New York City and in the *CableFAX Daily* Mid-Day Report released during the luncheon.

Congratulations to all of the finalists. See you on April 6th!

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2011 Awards Finalists

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Register at www.CableFAX.com/events

CableFAX Best of the Web Finalists

Ad / Series of Ads

- ► A&E The Fugitive Chronicles NY Times Takeover
- A&E The Glades, Pool Takeover
- ► A&E Kirstie Ally's Big Life, Bumping Units
- Castells & Asociados Time Warner Cable -TWC.com/espanol
- FEARnet Zombie Roadkill, Original Series Launch
- Oxygen Media Hair Battle Spectacular Digital Advertising

Best Website: Regional/Local Programmers

- ► Central Florida News 13 CFNews13.com
- Comcast SportsNet Mid-Atlantic -CSNWashington.com
- ► News 12 Interactive News12.com
- ► YES Network YESNetwork.com

Best Website: Technology and other Vendors

- Cisco The Cisco Website cisco.com
- Motorola The Motorola Mobility Website motorola.com
- ► Winnercomm CHC.com

Best Website - Cable Network - Large

- AMC AMCtv.com
- ► BBC Worldwide BBCAmerica.com
- ► Discovery Digital Media TLC.com
- ► ESPN ESPN.com
- ► Cartoon Network CartoonNetwork.com

Best Website - Cable Network - Small and MidSize

- ► Bay News 9 Baynews9.com
- ► EPIX EpixHD.com
- ► FEARnet FEARnet.com
- Charter Communications Live it with Charter.com

Blog or Series of Blogs

- ► AMC AMCtv.com's Mad Men Blog
- AMC AMCtv.com's The Walking Dead Blog
- ► CNBC.com NetNet with John Carney
- Comcast SportsNet Mid-Atlantic Chris Cooley's Blog
- ► E!/Comcast Entertainment Group The Soup Blog
- ► Time Warner Cable Untangled

Community / Social Networking

- ► ABC Family Digital Media The Live Huge Website
- ► EPIX EPIX Screening Room: Watch with Friends
- Oxygen Media, LLC OxygenLive TV
- Travel Channel Anthony Bourdain's 100th Episode
- ► YES Network My Yes

Contest / Online Games

- ► AMC Breaking Bad The Interrogation Interactive Graphic Novel
- Black Entertainment Network Fandemonium Award
- ► Buckeye CableSystem \$25,000 Pigskin Picks Contest
- Discovery Communications, LLC Discovery Kids Latin America Online Games - Ciudad Verde
- National Geographic Channel "MOVE!" The Great Migrations Facebook Game
- Cartoon Network Cartoon Network Universe:

Corporate Social Responsibility / Education

- ► A&E The Recovery Project
- Discovery Communications Discover Your Impact Day
- ► EPIX EPIX Presents: Waiting for Superman Virtual Town Hall
- ► Time Warner Cable, Inc. Connect a Million Minds

Digital Marketing Campaign

- ► HSN "Eat, Pray, Love"
- ► EPIX EPIX Fall 2010 Free Trial Digital Acquisition Campaign
- ► Retirement Living TV Prime Votes
- Travel Channel Anthony Bourdain's 100th Episode

Editorial Excellence - Overall

- ► AMC AMCtv.com
- ► CNBC.com NetNet.CNBC.com
- ► ESPN ESPN.com
- ▶ GMC watchgmctv.com
- News 12 Interactive Island Vote 2010 News12.com

Editorial Excellence - Special Section

- News 12 Interactive Island Vote 2010 News12.com
- Outdoor Channel Quarterly Online Program Guide

Email Newsletter/s

Outdoor Channel - Outdoor Channel's Weekly
 E-Newsletter

Original Content

- ► ESPN Sport Science
- ► EPIX EPIX Live
- Outdoor Channel boonDocs: Wilderness & Travel
 Medicine
- Retirement Living TV Prime Votes
- Scripps Networks Home Styles for FrontDoor.com
- Scripps Networks Drinks with Alie and Georgia
- ► WE tv and Wedding Central Put A Ring On It

Blogger / Tweeter / Social Networking Facilitator

- Faran Krentcil AMCtv.com's The Mad Men
- ▶ John Carney CNBC.com
- Conan O'Brien Conaco

Video Editor / Producer

- Mary Novak AMC
- Joe Auriemma YES Network

Web Content Director

- Drew Pisarra AMC
- ► Kevin Sullivan YES Network

Smartphone App

- Discovery Digital Media MythBusters iPhone App
- Smithsonian Networks Smithsonian Channel iPhone App
- ► Turner Sports NBA GAMETIME v3.0
- ► Turner Sports 2010 Ryder Cup iPhone App

Social Media Campaign

- ► FEARnet Zombie Roadkill, Original Series Launch
- Halogen TV Halogen + charity: water campaign Let's Build a Well Together. You act. We give.
- Scripps Networks Cooking Channel Launch
- Scripps Networks Cooking Channel Launch
 Travel Channel Anthony Bourdain's 100th

Supplemental Web Content

Episode

- ► AMC AMCtv.com's The Walking Dead Season 1
 Microsite
- Discovery Digital Media Discovery Channel's Life
- National Geographic Channel "Great Migrations"
 Website
- ► Starz Entertainment, LLC Spartacus: Blood and Sand: "The Arena" Website
- ► Time Warner Cable Connect a Million Minds
- ► WE tv and Wedding Central Virtual Wedding Boutique

Tablet App

- Discovery Communications MythBusters App for iPhone and iPad
- National Geographic Channel "Great Migrations" The Game - for iPad
- Starz Entertainment, LLC The Pillars of the Earth iPad App
- ► Turner Sports NBA GameTime: Courtside

Use of Facebook

- ► A&E Paranormal Experience
- ► Exercise TV Facebook Shopping Events
- Oxygen Media, LLC OxygenLive TV
- ► Time Warner Cable Mi Cultura Facebook Page Launch/World Cup Campaign
- ► Turner Sports NBA Facebook page

Use of Geo-Location (FourSquare, Gowalla, etc.)

- Conaco The Conan Blimp
- ► Turner Sports NBA Turnstile

Use of Twitter

- ► BET Fandemonium Award
- Comcast Entertainment Group E! Celebri-TWEET
- ► Discovery Channel's Shark Week
- ► Turner Sports NASCAR.COM Twitterverse

Use of Video

- ► AMC AMCtv.com
- Discovery Communications, Inc. Planet Green:
 City Shorts
- ► ESPN ESPN.com
- Turner Sports NBA.com Live Player Real
- ► Turner Sports TNT RaceBuddy

Virtual Tradeshow or Online Event

Conaco - Conan O'Brien Presents: Live Coco Cam
 Travel Channel - Anthony Bourdain's 100th

Web Site Design

Episode

- ► Bay News 9 Baynews9.com
- CNBC.com NetNet with John Carney
- ► FEARnet Zombie Roadkill, Original Series Launch
- National Geographic Channel "Great Migrations" Website

Web Site Redesign

- ► Faction Media comcastspotlight.com
- Sundance Channel Full Frontal Fashion
- Smithsonian Networks -
- ► Versus Versus.com

The winners will be announced during the April 6th awards breakfast at the Grand Hyatt Hotel in New York City and in the *CableFAX Daily* Mid-Day Report released during the luncheon.

Congratulations to all of the finalists. See you on April 6th!

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BUSINESS & FINANCE

said NAMIC pres Kathy Johnson and NAMIC chmn Raymond Gutierrez in a letter to members. -- WICT identified Comcast, Rainbow/WE tv, Time Warner Cable and Turner as its Strategic Touchstone Partners, an elite group of companies that demonstrate their commitment to gender diversity through this highest level of year-round support. Catalyst Touchstone Partners include Bright House, Cox, Disney, ESPN, MTVN, NBCU, Scripps Nets and Suddenlink. Cable One and Insight are Inspire Touchstone Partners, while the Kaitz Foundation continues to serve as WICT's industry partner.

Editor's Note: As Netflix continues to "flix" its muscles, Daily subs can go to CableFAXDaily.com to learn more about PriceWaterhouseCoopers' latest study on consumer behavior around movie rental/streaming. That and more available in our "Extras" and "Data Points" sections.

People: Tanya Giles ascends to evp, strategic insights and research, MTVN Ent Group. -- Richard Shirley was upped to vp, distribution biz dev at AETN. -- Former Weather Channel pres/CEO Debora Wilson joins Arris' board.

<u>Business/Finance</u>: Broadcom inked a definitive agreement to acquire for approx \$313mln Provigent, a privately-held provider of integrated mixed signal semiconductors for microwave backhaul systems.

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	CISCO:	17.39	0.25		
	CLEARWIRE:	5.06	(0.23)		
	CONCURRENT:	6.22	(0.03)		
	CONVERGYS:				
	CSG SYSTEMS:				
	ECHOSTAR:				
	GOOGLE:				
	HARMONIC:				
	INTEL:				
	JDSU:				
	LEVEL 3:				
	MICROSOFT:	25.33	0.53		
	RENTRAK:				
	SEACHANGE:				
	SONY:				
	SPRINT NEXTEL:	4.36	(0.69)		
	THOMAS & BETTS:				
	TIVO:				
	TOLLGRADE:	10.01	(0.02)		
	UNIVERSAL ELEC:	27.98	0.52		
	VONAGE:	4.10	(0.08)		
	YAHOO:	16.29	0.26		
	TELCOS				
	AT&T:	28.26	0.32		
	QWEST:				
	VERIZON:	36.46	0.62		
	MARKET INDICES				
	DOW:				
	NASDAQ:		-		
	S&P 500:	1298.38	19.18		







ADDS VALUE TO





EYE ON ADVERTISING

Tapping into Tours

How to get ahead in advertising? For an increasing number of cable networks, one answer is wrapping double-decker touring buses in some of the country's top markets with promotions for a series, or specific episode or star. Vector Media provides out-of-home ad opportunities for companies, and its relationship with tour bus companies in 13 major markets has helped its business with cable surge during the past few years. Clients include A&E, Discovery, HBO HGTV, NBC, Tennis Channel, USA and WGN America. Gary Greenstein, Vector national sales director, tells Cathy Applefeld Olson how "transit advertising" is network ad execs reach spread the word and woo

You mentioned cable has become one of the largest categories for Vector.

agencies and potential advertisers.

GG: Cable networks and TV in general, from what they've explained to us, are trying to reach a mass audience in an inexpensive way, but in a large format. A lot of the networks have such great images and stars, and the question is, How do you highlight them? I think they are starting to realize that double-deckers have really taken hold nationally—we've been working in New York for over four years—plus, there was never an option for billboard-sized ads in hearts of the downtowns of their major markets. And we have this media form that can get in there.

How does it work?

GG: Each network has a specific goal in mind. Some want to reach the top five markets, and some want to reach the advertising industry, so they tend to concentrate in New York, L.A. and Chicago. Some just want the entertainment industry or their talent to see it, so they go into L.A. or New York.

What does cable get out of these campaigns?

GG: They provide mass reach in the hearts of the largest urban landscapes in the country. And they reach the [business to business] market, impacting the ad agencies and media buyers right outside the entrances to their offices. Cable networks have always tried to get to media buyers, but they can have a hard

time doing it in a big way. When they advertise on the double-decker busses, the routes are very high-profile and tend to go right past their offices.

So, literally, the ad guys would see the billboard driving down the street outside their window?

GG: Reaching potential advertisers is a big deal for the networks. We can customize a specific route by taking the buses out of service and having them drive by the agencies. But the beauty of the routes is they tend to be on the most high-profile streets, and that's where the agencies tend to be, so the networks don't have to pay additional money to take them off route.

And this really works?

GG: It almost becomes like a traveling salesperson for that TV station. A network is bringing on a new show, so throughout the month leading up to the premiere their wrapped bus passes the big agencies every day. Then, as it gets closer they take the bus out of service and bring it over to the agency and invite their clients to get on the bus, entertain them, take them to lunch, give them the media planners. It's an opportunity for an interactive branding experience. We've done that for USA, for one. You can't do that with a radio spot. You can't do that with a billboard.

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

CableFAX workshop April 5, 2011 8:45am-4:30pm NYC How to Motivate Employees to Boost Bottom Line and Retention

Reports and statistics show that a motivated workplace is essential to the financial success of an organization. With cable competition perhaps at an all-time high and budgets tighter than they've been in years, MSOs, programmers and vendors must maximize employee talent. On top of that, managers are being asked to do more with less. In this climate, motivation, leadership and retention have become even more important to the bottom-line.

Questions: Contact Kate Schaeffer at kschaeffer@accessintel.com or 301.354.2303

Register today at www.cablefax.com/april5

