

# CableFAX Daily™

Wednesday — March 26, 2008

What the Industry Reads First

Volume 19 / No. 058

## Card 'Em: Subscribers Still Aren't Hungry for CableCARDS

It has been almost 2.5 years since the FCC began requiring the largest cable ops to file status reports every 90 days on deployments of CableCARDS. With NCTA just filing the most recent update, it seemed like a good time to take a closer look at how far the industry has come. The big picture: the 5 largest operators have deployed more than 320K cards for us in one-way digital cable devices, such as TiVos, as of Mar 19. That compares to just over 60K in Oct '05, the date of the 1st FCC status report. While numbers are up, consumers still aren't clamoring for the cards. Since the July 1, '07 set-top integration ban went into effect requiring ops to deploy CableCARD-enabled boxes, the top 10 operators have deployed more than 4.18mln set-tops with the cards. That represents more than 12 times the number of CableCARDS requested by consumers in one-way devices in the last 4 years. Expect the industry, which fought the ban, saying it was unnecessary, to continue to remind the FCC of that stat. For the most part, the cost of the cards has remained static. Here's a breakout of stats for the top 5 MSOs for the 2.5 year period.

**Cablevision:** # of CableCARD subs: 15,923; Monthly lease rate: Has climbed to \$2 from \$1.25 in '05; Avg installation cost: Increased 34% to \$46.95; Requires professional installation of CableCARDS

**Charter:** # of CableCARD subs: 26,625; Monthly lease rate: Has stayed flat at \$1.50; Avg installation cost: Flat at \$32; Requires professional installation of CableCARDS

**Comcast:** # of CableCARD subs: 198,066; Monthly lease rate: \$0.00 (additional cards are \$1.63/month); Avg installation cost: \$22; down from \$23.12; 10% of CableCARD installs are self-installs vs 4% in '05

**Cox:** # of CableCARD subs: 24,011; Monthly lease rate: Has stayed flat at \$1.99; Avg installation cost: Increased 45% since '05 to \$33.29; Requires professional installation of CableCARDS

**Time Warner Cable:** # of CableCARD subs: 55,764; Monthly lease rate: Avg is \$2.30, but most divisions are at \$1.75—the same price as in '05; Avg installation cost: Some divisions charge, while others don't. The avg install price has climbed almost 12% to \$21.15 over the 2.5 years. 5% of CableCARD installs are self-installs vs 18% in '05

## Out At Home: Blank Screens Mar Baseball Opener

Although the increasing availability of MLB games in HD remains an important development for the '08 baseball season, crystal clear pictures won't mean a thing without service. The Red Sox and Athletics pitched the season's 1st contest from Japan Tues morning, only to have the game blacked out for various time periods on both DirectTV and Comcast. The satcaster experienced "technical difficulties" that prevented NESN's standard-def signal from working until the game's 7th inning, and ESPN2's game coverage was never available. DirectTV's HD feeds of both nets were unaffected. Similar but unrelated issues prevented a small number of Comcast subs in southeastern

*The Countdown has begun...*

Can't wait for **OPENING DAY**? Well neither can we. So all this week, **The Superstation** is pitching you a great baseball movie lineup.

<b>BULL DURHAM TONIGHT</b>	8   7p ct
<b>Field of Dreams Thursday</b>	8   7p ct
<b>Ferris Bueller's Day Off Friday</b>	8   7p ct
<b>Mr. Destiny Saturday</b>	6   5p ct
<b>Mr. Baseball Sunday</b>	11   10p ct

**THE SUPERSTATION**  
ALSO AVAILABLE IN HD

Bill Shaw President/GM \_ Chris Gilpatric SVP/Affiliate Sales 212.210.5900

CABLEFAX DAILY (ISSN 1069-6644) is published daily by Access Intelligence, LLC ● www.cablefax.com ● fax:301/738-8453 ● Editor-in-Chief: Amy Maclean, 301/354-1760, amaclean@accessintel.com ● Exec Editor, Michael Grebb, 301/354-1790, mgrebb@accessintel.com ● Assoc Editor, Chad Heiges, 301/354-1828, cheiges@accessintel.com ● Asst VP, Ed Director, Seth Arenstein, 301/354-1782, sarenstein@accessintel.com ● Publisher: Debbie Vodenos, 240/753-5696, dvodenos@accessintel.com ● Acct Mgr: Erica Gottlieb, 212/621-4612 ● Marketer: Doreen Price, 301/354-1793, dprice@accessintel.com ● Marketing Director: Carol Bray, 301/354-1763, cbray@accessintel.com ● Prod: Joann Fato, cdaily@accessintel.com ● Diane Schwartz/VP and Group Publisher ● Paul Maxwell/Columnist.Subs/Client Services: 301/354-2101, fax 301/309-3847 ● Group Subs: Angela Gardner, 757/531-1369, cfaxgroupsub@accessintel.com

MA from accessing the game until later innings. NESN and ESPN2 did re-air the game Tues afternoon, but disgruntled fans may have been more forgiving of the inauspicious outages if they weren't required to rise at 6am ET for the opening pitch. Still, fans may look forward this year to a HD baseball bonanza, led by NESN (Red Sox), **SNY** (Mets), **YES** (Yankees) and **SportsTime OH** (Indians). These RSNs are set to televise all of their '08 MLB regular season games in HD, and YES even aired all of the Yankees pre-season games in high-def. Add to the mix FSN, which will offer approx 1K live HD telecasts of MLB games this year, nearly double last season's number and 63% of the RSN's entire MLB schedule.

**Competition:** AT&T has expanded the Austin availability of **U-verse TV** to include more than 150K homes.

**Carriage:** Starz is negotiating a renewal agreement with **Time Warner Cable**, according to a SEC filing. The contract actually expired at the end of '06, but the 2 worked out an extension that ran through May 31 '07 and was later extended to Apr 30 '08. Other tidbits from the 10K filing: **GSN** is out of contract with **DirecTV**, which accounts for 25% of its sub base and 11% of rev (the 2 were out of contract at this time year as well and are currently in negotiations). **Liberty** and **Sony** each own half of GSN. Last month, Liberty exchanged its 16% ownership interest in **News Corp** for a stake in DirecTV, along with 3 RSNs, and \$465mln in cash.

**Retrans:** Suddenlink has finalized a retrans deal with hardliner **LIN TV** for Austin, TX, **NBC** affil **KXAN**, ending months of negotiations. LIN yanked the signal in early Jan. The deal also includes KXAN's HD signal, and forces the repositioning in certain TX markets of **KCEN**, the NBC affil that inked a retrans deal with Suddenlink shortly after LIN pulled KXAN.

**Deals:** Even in the current down market, deals are getting done. Witness the closing of **The Carlyle Group's** \$1.7bln equity investment in France's largest cable op, **Numericable**, and DSL network provider **Completel**. The transaction represents the largest equity investment ever made by a single private equity firm in France. **RBC Daniels** and **Goldman Sachs** represented Carlyle in the transaction.

**Online:** **Comedy Central** and series creators **Trey Parker** and **Matt Stone** have launched **SouthParkStudios.com**, featuring free streaming eps and clips from the show's entire 12 seasons. The site launched in beta Mar 19. -- **ESPN** has acquired **HoopGurlz.com**, the only US Website solely dedicated to the coverage of high school girls' basketball and women's college-basketball prospects on a national basis.

**VOD:** Cablevision has added **Starz On Demand** and **Encore On Demand** to the SVOD services available to its digital subs. Access to both runs \$5/month. The MSO offers more than 2K hours on demand titles.

**Ratings:** **USA** (2.2/2.09mln) kept its usual perch atop prime, aided by the week's top 4 shows, or 2 hours each of **WWE** and "Law & Order: SVU." **Disney** (1.9/1.84mln) followed, and **TBS** (1.6/1.54mln) and **TNT** (1.6/1.50mln) tied for 4th.

**Programming:** **HGTV** has ordered additional eps of "Rip & Renew," "Color Correction," "Find Your Style" and "Save My Bath." -- **FSN** will ring the bell Apr 19 for **IFL's** "Fight Night," a MMA show that will air on the net through mid-Jul. -- **VOOM's Equator HD** greenlit 3 original series, including "Mario's Green House," chronicling the *Van Peebles* family's green home renovation, and "The Monkey Thieves," featuring a lawless pack of urban monkeys living in India.

**Big Apple Move:** CO-based exec search firm **Carlsen Resources** has opened a NYC office at 1560 Broadway. "With

HIGHEST RATED PREMIERE EVER DREW 1.3 MILLION VIEWERS!  
DELIVERING .9 HH RATING  
389K W18-49  
357K W25-54

AND REMAINS STRONG IN WEEK TWO  
RANKING #2 AMONG ALL CABLE NETWORKS  
WITH A 1.5 RATING AMONG W18-34<sup>1</sup>

**We**™  
rainbowaffiliate.com

Source: Nielsen Media Research, Live+SD Data: NPower, 3/18/08, 10p-11p Program based reach & frequency schedule, 6 minute qualifier, 75% unification, P2+ (000); WE tv's "High School Confidential" Premiere (3/10/08 10p-11p), ranked against all WE tv premieres (as coded in Nielsen) in Total Day to-date (12/21/01-3/13/08); 1Live Data: Mon 10p-11p 3/17/08 all cable program ranker, W18-34; all ratings based on coverage area. Subject to qualifications upon request.

# BUSINESS & FINANCE

some of the industries we serve consolidating and other strongly growing, our senior leadership team felt it was important to be where our business is and where our clients need us to be," said founder/CEO *Ann Carlsen*.

**On the Circuit:** ESPN svp, marketing *Katie Lacey* and Rogers Comm chief strategy officer *Mike Lee* were named co-chairs for **CTAM Summit '08**, Nov 9-11 in Boston.

**Honors:** The Intl Assoc of Haunted Attractions awarded **Travel Channel** with an "OSCARE" (get it?) for its lineup of haunted programming, including "Most Haunted."

**Obit:** Cable pioneer *Fred Lieberman*, 75, passed away Mar 12 in Boca Raton, FL. Fred, along with *Jack Crosby*, founded **Telesystems Service Corp.** after working for **Jerrold**. The *Ft. Lauderdale Sun-Sentinel* noted that "he generously supported numerous charitable causes."

**People:** USA/Sci Fi darling *Bonnie Hammer* was given the additional post of pres, cable for **NBCU**. The promotion comes as Hammer re-upped a multiyear deal with the company. -- **ESPN** promoted *Burke Magnus* to svp, college sports programming. Magnus will assume many past duties of evp, college sports programming *Chuck Gerber*, who will retire from the company Apr 11. -- **NBCU** appointed *Adam Wiener* COO, **driverTV**.

## CableFAX Daily Stockwatch

Company	03/25 Close	1-Day Ch	Company	03/25 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
BROADCASTERS/DBS/			AMDOCS:	29.76	0.11
BRITISH SKY:	44.95	1.42	AMPHENOL:	38.06	0.64
DIRECTV:	25.08	(0.22)	APPLE:	140.98	1.45
DISNEY:	32.08	0.04	ARRIS GROUP:	6.06	0.22
ECHOSTAR:	29.26	1.28	AVID TECH:	25.42	(0.22)
GE:	37.27	(0.13)	BIGBAND:	5.97	(0.07)
HEARST-ARGYLE:	21.33	0.16	BLNDER TONGUE:	1.45	(0.03)
ION MEDIA:	1.45	0.00	BROADCOM:	18.83	0.18
NEWS CORP:	19.39	0.27	CISCO:	25.75	0.11
<b>MSOS</b>					
CABLEVISION:	22.21	0.41	COMMSCOPE:	37.29	(0.25)
CHARTER:	0.96	0.00	CONCURRENT:	0.63	0.02
COMCAST:	20.54	0.33	CONVERGYS:	15.32	(0.1)
COMCAST SPCL:	20.04	0.28	CSG SYSTEMS:	11.31	(0.12)
GCI:	5.91	0.36	ECHOSTAR HOLDING:	30.54	0.39
KNOLOGY:	13.50	0.00	GEMSTAR TVG:	4.72	0.00
LIBERTY CAPITAL:	15.73	(0.12)	GOOGLE:	450.78	(9.78)
LIBERTY ENTERTAINMENT:	22.25	0.49	HARMONIC:	8.20	(0.03)
LIBERTY GLOBAL:	35.92	0.42	JDSU:	14.11	0.29
LIBERTY INTERACTIVE:	16.92	0.04	LEVEL 3:	2.20	0.10
MEDIACOM:	4.50	(0.02)	MICROSOFT:	29.14	(0.03)
ROGERS COMM:	42.97	0.00	MOTOROLA:	9.76	0.07
SHAW COMM:	18.63	0.14	NDS:	50.14	(1.02)
TIME WARNER CABLE:	26.27	0.16	NORTEL:	6.85	0.33
VIRGIN MEDIA:	15.00	0.29	OPENTV:	1.28	0.03
WASH POST:	669.02	11.02	PHILIPS:	38.17	0.04
<b>PROGRAMMING</b>					
CBS:	23.06	(0.18)	RENTRAK:	11.70	0.50
CROWN:	5.01	(0.15)	SEACHANGE:	7.34	(0.14)
DISCOVERY:	21.85	0.45	SPRINT NEXTEL:	6.42	(0.16)
EW SCRIPPS:	43.00	0.21	THOMAS & BETTS:	36.57	0.67
GRUPO TELEVISIA:	24.25	0.18	TIVO:	8.85	(0.15)
INTERACTIVE CORP:	21.21	(0.49)	TOLLGRADE:	5.69	0.29
LIBERTY:	1.00	0.00	UNIVERSAL ELEC:	25.11	2.17
LODGENET:	7.15	(0.25)	VONAGE:	1.90	0.05
NEW FRONTIER:	5.00	0.31	VYYO:	0.67	0.00
OUTDOOR:	7.26	(0.03)	WEBB SYS:	0.03	(0.04)
PLAYBOY:	8.86	(0.03)	YAHOO:	28.73	1.21
TIME WARNER:	14.89	0.27	<b>TELCOS</b>		
UNIVISION:	36.23	0.00	AT&T:	38.00	(0.03)
VALUEVISION:	6.01	0.01	QWEST:	4.94	(0.11)
VIACOM:	40.07	0.14	VERIZON:	36.90	(0.07)
WWE:	18.80	(0.58)	<b>MARKET INDICES</b>		
<b>TECHNOLOGY</b>					
3COM:	2.07	0.07	DOW:	12532.60	(16.04)
ADC:	12.58	0.09	NASDAQ:	2341.05	14.30
ADVANTAGE:	3.86	0.15			
ALCATEL LUCENT:	5.68	0.19			



It's not about reliving the past.  
It's about reinventing the future.

There's a powerful demographic shift going on. Today's 55+ market is dynamic, technologically savvy and responsible for \$1.7 trillion in annual consumer spending.

Retirement Living TV is at the forefront of this exciting opportunity. Our original programming, targeted print and online resources will help you tap into this fast growing market.

Welcome to the new age of 55+.

Launch Retirement Living TV today.  
Contact Betsy Brightman at 443 430 8944 or BBrightman@RL.TV



Inspiring your freedom years  
WWW.RL.TV

# CableFAX

March 25, 2008

Dear Friends of CableFAX-

NCTA is coming soon, and CableFAX would like to partner with you to showcase your brands and messaging in the marketplace. From strategic branding to driving traffic to your booth during The Cable Show, CableFAX is planning a number of unique initiatives to connect you with your customers and maximize your business opportunities at NCTA in New Orleans in May.

Please contact me to discuss the following partnerships with CableFAX:

\* On the Road to NCTA, our FAXIES event honoring the top cable marketing and pr campaigns will take place May 6 the National Press Club in Washington DC. The FAXIES finalists will be announced later this week. Ask about sponsorship and key on-site and online exposure.

\* CableFAX: The Magazine, debuts at the FAXIES event but extends through The Cable Show. Secure your spot in this must-read, coffee-table book profiling the leaders in cable communications. Ad Sales Close is April 11.

\* NCTA/Cable Show Coverage from our award winning editorial team in CableFAX Daily the week of May 12- May 16.

\* Online Coverage of The Cable Show at [cable360.net](http://cable360.net) and [Cablefax.com](http://Cablefax.com), before, during and after the Show.

\* Distribution: CableFAX:The Magazine and CableFAX Daily will be distributed to all attendees of The Cable Show (room drops, editorial panels, bins and more), at the FAXIES event on May 6, and to more than 20,000 cable executives.

What are your goals during NCTA? We want to be part of your team to achieve your objectives. Please contact me at your earliest convenience to secure your unique spot with the industry's most trusted information source, CableFAX.

Thank you in advance, we look forward to serving you.

Warm Regards,



Debbie Vodenos  
Publisher, CableFAX  
301-354-1695  
[dvodenos@accessintel.com](mailto:dvodenos@accessintel.com)



Erica Gottlieb  
Account Manager  
212-621-4612  
[egottlieb@accessintel.com](mailto:egottlieb@accessintel.com)

CABLE 360 NET

# CableJobs

The place for talent

**Position: Dir of Operations & Forensic Engineering, Customer Service Ops Center, Cablevision**  
**Location: New York**

**Description:** The CSOC identifies video, voice or data network issues and coordinates communications among customer service, field operations, network operations, and engineering. This is a high-profile role, regularly interacting with executive management and is an excellent opportunity for an outstanding operations or development engineer to broaden his or her experience in operations. The Director will manage the Operational Analysis team and lead the analysis process.

The successful candidate must be a strong communicator and team builder with engineering-level expertise in cable video, data and voice technologies, as well as very strong analytic skills and significant cable industry experience in either engineering operations or engineering R&D. Experience in customer service or field service helpful, but not required.

Send resume to [execrec@cablevision.com](mailto:execrec@cablevision.com)

### Job Seekers:

Access the newest and freshest jobs available to cable professionals. Post your resume and let the jobs come to you.

### Employers/Recruiters:

Reach highly qualified candidates by posting your opening on the cable job board.

**New Feature:** Reach more cable industry job seekers and gain exposure through Cable360's print publications and online job postings!

**Special Offer:** Receive an extra 15% off when you enter code 19345434 on your next job posting.

*We've got the next cable job — or the candidate — for you!*

### [www.cable360.net](http://www.cable360.net)

Use the Cable Job Center to find talent or to connect with new employment opportunities.

**For job seekers: Find jobs, manage your resumes, and set up job alerts —**

- Post an anonymous resume
- Access the newest and freshest jobs available
- Create Job Alerts that match your search criteria



**Employers/Recruiters: Post jobs, browse candidates interested in your positions —**

- View resumes and only pay for the ones that interest you
- Reach the most qualified candidates
- Quickly post job openings and manage your online recruiting efforts with ease

[www.cable360.net](http://www.cable360.net)