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Wednesday — April 10, 2013

What the Industry Reads First

Volume 24 / No. 069

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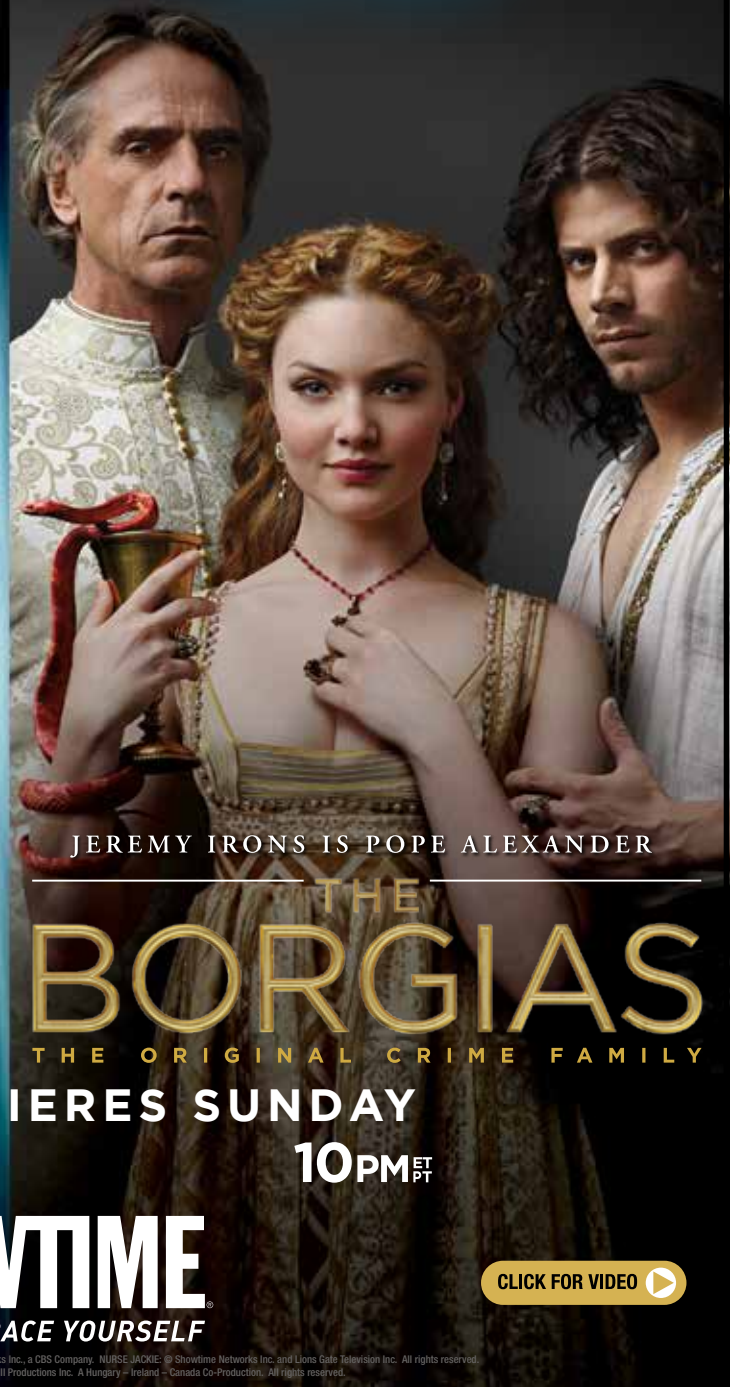
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## Work of Friction: TiVo Looks to Maximize Ratings Data

Adding **Nielsen's** currency to an initiative by **TiVo Research and Analytics** (TRA) to match set-top-box data with consumer purchasing data could make data more actionable, said industry execs gathered at a TRA breakfast in NYC Tues morning. The execs were reacting to TiVo's decision to license Nielsen data as a resource for mutual customers of TRA and Nielsen. "It's about removing the friction in the process," said *Amanda Richman*, pres of investments and activation, **Starcom**. She said that while not a game changer, it's "a shift in the right direction." But *David Poltrack*, chief research officer at **CBS Corp** and pres **CBS Vision**, said "we consider this a major step forward" because what has taken analysts days to generate will now take hours. But will traditional media firms actually embrace more accurate data? "We're not holding this back at all," Poltrack said. "I believe advertising right now is undervalued significantly as a marketing tool" precisely because it's not measured properly. "We welcome this opportunity to provide the real value of media," he said. *Bruce Lefkowitz*, evp, ad sales at **Fox Cable Networks**, said "we have to embrace it" despite worries about the current ecosystem because "at the end of the day, it's all about moving product." He said he most worries about fragmentation. "And it's other people being able to prove their relative value" via other platforms, he said. But Poltrack said "that's competition," arguing that CBS' biggest threat is not, in fact, **Aereo**, but rather "misinformation... There is a lot of bad information out there." Most problematic are "people in Congress, the people who are making the laws... They are so misinformed and so confused... that that is a danger." Will Fox turn itself into a cable net, as **News Corp** COO *Chase Carey* reportedly suggested this week? "No comment," Poltrack said. "Generally we believe that our intellectual property and our content... is the most important asset, and we're going to protect it in every way possible... We're going to fight. How we do that, I'm not going to reveal that at this breakfast."

**Rural Broadband:** Members of the **Senate Communications** subcmte centered their questions at Tues' inaugural hearing on the use of govt subsidies like USF and its impact on rural providers. Several members seemed sympathetic to the witnesses' concerns on regulatory certainty as a result of the existing framework. There will be follow-up discussions and additional hearings on rural broadband, according to new subcmte chmn *Mark Pryor* (D-AR) and ranking member *Roger Wicker* (R-MS). **ACA** board member *Patricia Boyers*, head of **Boycom Cablevision**, wants rigorous Congressional over-

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June 10, 2013  
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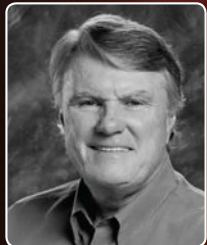
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sight to make sure government subsidies won't be used to compete with her company and other small providers. Spending USF money without accountability is like "letting the cows out and then closing the gate," she said, recommending that the **FCC** mirror **RUS'** loan process where applicants need to justify expenses with invoices and evidence throughout the process. Meanwhile, all providers should have an equal opportunity to access support during FCC reverse auctions, Boyers said. The prospect of further cuts to the USF program creates "heavy" regulatory uncertainties that make business planning "extremely difficult," said *John Strode*, vp, external affairs, AR-based provider **Ritter Comm. CenturyLink** wants the FCC to ensure that supported services are "reasonably equivalent to those available in urban markets, in features, quality and price," said *Steven Davis*, evp, CenturyLink. In addition, "we must match support and obligations to serve—obligations can't exceed the available support, and those obligations should be limited to the supported areas," he said. Going forward, subcmte members will work with new FCC leadership as chmn *Julius Genachowski*, who launched the reform, exits. Two rural telecom groups have argued the chmn's departure might be a good window for a "time out" to get the overhaul right.

**Cablevision Changes:** Cablevision has expanded *Kristin Dolan's* role, naming her pres, Optimum Services. The change means the entire sales organization is now under her, giving her oversight on what initiatives are accelerated. That previously fell to pres/CEO *Jim Dolan*, to whom she will report. Formerly sr evp, product mgmt., marketing and dev, Kristin Dolan now oversees the entire Optimum customer experience as well as brand positioning. As part of the senior leadership realignment, *Wilt Hildenbrand*, previously sr adviser engineering and tech, adds customer care responsibilities as sr adviser of customer care, technology and networks. That will make a lot of sense to customers who have reached out to Hildenbrand via online forums over the years. He regularly monitors and responds, so much so that many post his name in the subject line of the post detailing their question or problem. *Brian Sweeney*, most recently svp, e-media, was tapped for the new post of sr evp, strategy. Sweeney, the son-in-law of *Chuck Dolan* (and brother-in-law of Jim and Kristin Dolan) will focus on customer retention and acquisition, and long-term planning. He'll also be chief of staff to Dolan. Sweeney has been at the company for nearly 20 years and helped lead development on the Optimum App, which has been downloaded more than 1mln times. Like Kristin Dolan, Hildenbrand and Sweeney will report to pres/CEO Jim Dolan. "Working together, Kristin, Brian, Wilt and the rest of our executive leadership team will help Cablevision to drive further innovation and efficiency across our product portfolio and move us closer to our vision of delivering the highest quality experience to our customers each time they use our products or services," Jim Dolan said in a statement. Last month, Jim and Kristin Dolan confirmed that they have been in a trial separation since the holidays, which they described as amicable.

**Energy Alert:** Cable continues to tell the **Dept of Energy** that it doesn't need DOE standards to reduced energy consumption. **NCTA** submitted comments late Mon opposing DOE's proposal for a rulemaking that a set-top box test procedure. The trade group said DOE is ignoring a Dec '12 voluntary agreement among MVPDs to improve the energy efficiency of set-tops. "Just the first phase of its commitments when fully realized will result in annual residential electricity savings of at least \$1.5bln, reducing carbon emissions by the equivalent of 4 power plants annually, years before any DOE rules could take effect," NCTA said. If DOE does move forward, the trade group argues that it's required to use the **CEA** test procedure rather than DOE's test procedure, which would lead to the designation of thousands of "models" of set-top boxes, each of which would have to be tested separately. That would be "a crushing and time wasting burden for every MVPD and for hundreds of small businesses that DOE appears not to even know would be affected by its proposal," NCTA said. **ACA** chief *Matt Polka* mirrored those concerns, arguing that "DOE's proposals utterly fail to account for the cost burdens they would impose on small cable companies that lack the resources to comply with a host of complicated mandates."

**High Fiber:** Google made it official, announcing Austin, TX, as the 2nd city to get Google Fiber (*Cfax*, 4/8). **AT&T** piggy-backed with an "us too" announcement that seemed to be more a "Do unto Google as you do unto **U-verse**" message for the city. The telco said it was prepared to launch a fiber network capable of 1Gbps speeds on the same terms and conditions as Google. Kansas City was criticized for allegedly giving Google favorable concessions. As for Google Fiber Austin, no pricing details yet, but it's expected to be similar to Kansas City. And just like KC, customers will get a free Internet connection at 5Mbps for 7 years, provided they pay a 1-time construction fee.

**March Madness:** This year's **NCAA** Division I Men's Basketball tournament averaged 10.7mln total viewers, up 11% YOY and is the highest average for the tournament in 19 years. The championship game, which saw **Louisville** defeat **Michigan**, was aired on **CBS** Mon. The *Wall Street Journal* reported that **Turner**, which covered the early rounds of the

# BUSINESS & FINANCE

tournament, is discussing a deal with CBS to let Turner broadcast the more popular later rounds and the championship next year. Meanwhile, nearly 22% of 8.15m brackets correctly picked Louisville to win the title, according to brackets in ESPN.com.

**Programming:** Starz will develop scripted Vietnam War drama "Airborne," penned by *Gideon Yago*.

**Upfronts:** GSN unveiled plans for 2 new series and announced it had added 106 new advertisers at its upfront presentation in NYC Tues. The net talked up a **Frank Magid & Assn** survey that found GSN is primarily watched live (with 74% paying attention to commercials). It greenlit a GSN original version of "Minute to Win It" to be hosted by *Apolo Anton Ohno* and quiz show "The Chase." In development: "Dance Rivals," competing Orem, UT, dance studios; "It Takes a Church," a church goes on a mission to find love for a single parishioner without them knowing; and "The Imposter," house guests are embedded with families and must figure out which family member is faking it.

**Intl:** Discovery Comm completed the acquisition of **SBS Nordic** operations, announced in Dec. This adds 12 TV networks to Discovery's portfolio of 8 brands in Norway, Sweden, Denmark and Finland, to form a combined regional business to be known as **SBS Discovery Media**. More at CableFAX.com.

## CableFAX Daily Stockwatch

Company	04/09 Close	1-Day Ch	Company	04/09 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
DIRECTV:	55.42	(0.29)	CONVERGYS:	16.37	(0.18)
DISH:	36.24	(0.16)	CSG SYSTEMS:	20.20	(0.14)
DISNEY:	59.14	0.32	ECHOSTAR:	37.70	(0.3)
GE:	23.06	(0.06)	GOOGLE:	777.65	2.80
NEWS CORP:	31.36	(0.21)	HARMONIC:	5.72	0.04
			INTEL:	21.75	0.66
<b>MSOS</b>			JDSU:	13.34	0.28
CABLEVISION:	14.41	(0.04)	LEVEL 3:	21.20	1.20
CHARTER:	103.58	(1.17)	MICROSOFT:	29.61	1.02
COMCAST:	41.28	(0.35)	RENTRAK:	21.73	(0.17)
COMCAST SPCL:	39.02	(0.33)	SEACHANGE:	11.41	0.02
GCI:	8.92	0.04	SONY:	16.79	(0.23)
LIBERTY GLOBAL:	73.69	(0.41)	SPRINT NEXTEL:	6.28	(0.02)
LIBERTY INT:	20.99	(0.17)	TIVO:	11.36	(0.21)
SHAW COMM:	24.06	0.06	UNIVERSAL ELEC:	21.92	(0.37)
TIME WARNER CABLE:	94.68	(1.29)	VONAGE:	2.91	(0.03)
VIRGIN MEDIA:	49.28	(0.17)	YAHOO:	23.83	0.35
WASH POST:	440.31	1.44			
			<b>TELCOS</b>		
<b>PROGRAMMING</b>			AT&T:	37.76	0.14
AMC NETWORKS:	64.61	0.28	VERIZON:	49.36	(0.07)
CBS:	45.86	(0.33)			
CROWN:	2.03	0.03	<b>MARKET INDICES</b>		
DISCOVERY:	78.60	(0.28)	DOW:	14673.46	59.98
GRUPO TELEVISA:	27.19	0.18	NASDAQ:	3237.86	15.61
HSN:	52.75	(0.44)	S&P 500:	1568.61	5.54
INTERACTIVE CORP:	44.50	0.20			
LIONSGATE:	23.28	(0.15)			
OUTDOOR:	8.85	UNCH			
SCRIPPS INT:	66.29	(0.6)			
STARZ:	21.32	0.02			
TIME WARNER:	58.80	0.45			
VALUEVISION:	3.54	0.17			
VIACOM:	65.14	(0.86)			
WWE:	8.78	(0.05)			
<b>TECHNOLOGY</b>					
ADVANTAGE:	2.34	0.05			
ALCATEL LUCENT:	1.42	0.08			
AMDOCS:	35.45	(0.02)			
AMPHENOL:	73.00	(0.04)			
AOL:	39.28	0.14			
APPLE:	426.98	0.77			
ARRIS GROUP:	16.41	(0.18)			
AVID TECH:	6.21	0.02			
BLNDER TONGUE:	1.00	(0.05)			
BROADCOM:	33.74	0.18			
CISCO:	20.97	0.40			
CLEARWIRE:	3.26	(0.01)			
CONCURRENT:	6.98	0.49			

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