

CableFAX Daily™

Thursday — April 12, 2012

What the Industry Reads First

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Ratings Forecast: Why Thermometer Reading May Reveal More than Temperature

Interesting research note from **Sanford Bernstein** sr analyst *Todd Juenger* taking a different tact on 1Q ratings. “Largely absent from the conversation has been the impact of a smaller estimated universe of viewers,” writes Juenger, pointing to **Nielsen’s** estimates that the US TV audience has 1% fewer HHs and 2.7% fewer 18-49s compared to a year ago. “The implication is staggering—if the same percentage of people in the Nielsen TV panel watch a program, generating the same rating as last year—this year the projected audience will be -2.7% lower because Nielsen is projecting to a universe that’s—2.7% lower. This effect has been compounded in Q1 because total consumption of TV is down ~1% as well.” **Turner** chief research officer *Jack Wakshlag* said the change in Nielsen universe estimates is largely a result of recalibrating to the decennial census, and that it’s not the 1st time it has happened. The same thing occurred after the ’90 census adjustments. What may be refreshing to the industry is that Juenger rejects the notion that OTT is responsible for cable network share loss. See, not everyone’s convinced **Hulu** is an evil plot to take over the world. While Juenger ponders possibilities for declines (lack of HH formation, possible cannibalization from SVOD, etc), Wakshlag has a much simpler theory: “We believe [it] is attributable to the variance in weather this year vs last.” March boasted record highs across the lower 48 states—even bitterly cold International Falls, MN, saw temps in the 70s for 5 days last month. “Put this together with last year’s unusually cold—and very snowy—winter and you have an understanding of what’s going on,” Wakshlag said. Of course, that doesn’t quite explain why some nets, like **TBS**, saw 1Q gains—but it could factor into why 18-49 viewership is down 3.7% TV-season-to-date. Based on **Discovery Comm’s** strong numbers, **Sanford Bernstein** raised Discovery’s target price to \$58 from \$55, while dropping ratings beleaguered **Viacom** to \$48 from \$50. Juenger’s bottom line is that he’ll be watching closely this summer when cable has historically benefited from broadcast hiatuses. Maybe a heat wave will keep people indoors...

Competition: Something to keep an eye on. **DISH** turned to **Procter & Gamble** for its CMO position, hiring *James Moorhead*. We suspect his marketing tactics will be much slicker than the inflatable pigs of days gone by. He was, after all, *Brandweek’s* ’10 Grand Marketer of the Year winner. “While normally we wouldn’t consider the



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RENTRAK

Ad/Series of Ads - Distributor

- ▶ Comcast Spotlight - *Comcast Spotlight Eye-Con Campaign*
- ▶ Time Warner Cable Media - *2011 New York International Auto Show / Automotive On Demand*

Ad/Series of Ads - Programmer

- ▶ A&E - *The Glades Season 2 - Axe Unit*
- ▶ Starz Entertainment, LLC - *Spartacus: Gods of the Arena Digital Online Campaign*
- ▶ Turner Sports - *NBA.com/ESPN Fantasy Basketball*
- ▶ Turner Sports - *NBA TV "Bobble Heads"*

Best Overall Website - Cable Network - Large

- ▶ AMC - *AMCtv.com*
- ▶ CNBC - *CNBC.com*
- ▶ E! Entertainment - *E! Online*
- ▶ G4 - *G4tv.com*

Best Overall Website - Cable Network - Small and MidSize

- ▶ FEARnet - *FEARnet.com*
- ▶ MSG Varsity - *MSGVarsity.com*
- ▶ nuvoTV - *mynuvotv.com*
- ▶ Outdoor Channel - *OutdoorChannel.com*

Best Overall Website - Cable Operator

- ▶ Comcast Cable - *Comcast.com*
- ▶ Cox Communications Inc - *Customer Centered Online Experiences*
- ▶ Time Warner Cable - *TimeWarnerCable.com*

Best Overall Website - Regional/Local Programmers

- ▶ BayNews 9 - *baynews9.com*
- ▶ Central Florida News 13 - *cfnews13.com*
- ▶ Comcast SportsNet Mid-Atlantic - *CSNWashington.com*
- ▶ Comcast SportsNet Philadelphia - *CSNPhilly.com* (online home of Comcast SportsNet Philadelphia)
- ▶ YES Network - *YESNetwork.com*

Best TV Everywhere App

- ▶ AT&T U-verse - *AT&T U-verse App*
- ▶ CNN - *The CNN App*
- ▶ Comcast Corporation - *The XFINITY TV app*
- ▶ MSG Varsity - *MSG Varsity*

Blog or Series of Blogs

- ▶ AMC - *HanksBlog*
- ▶ BBC Worldwide Limited - *Anglophenia*
- ▶ CNBC - *NetNet with John Carney*
- ▶ RLTV - *Good Food, Good Deeds*

Blogger/Tweeter/Social Networking Facilitator

- ▶ Central Florida News 13 - *Jennifer Cook*
- ▶ CNBC - *John Carney*
- ▶ Turner Sports - *John Kim*
- ▶ Time Warner Cable - *Jeff Simmermon*

Community/Social Networking

- ▶ 360i - *USA Network - Bruce Campbell/The Fall of Sam Axe Ask Me Anything Reddit Campaign*
- ▶ Scripps Networks Interactive - *Food Network's Communal Table: Thanksgiving Edition*
- ▶ The Weather Channel - *The Weather Channel Social*

Contest / Online Games

- ▶ AMC - *Breaking Bad Games*
- ▶ Charter Communications - *Charter Center Stage*
- ▶ A&E - *Breakout Kings' Catch a Con Sweepstakes*
- ▶ National Geographic Channel - *Expedition Week's MISSION EXPEDITION*
- ▶ IFC - *Rhett & Link: Commercial Kings Loco Awards*
- ▶ WE tv - *Cake Staker Game*

Digital Marketing Campaign - Distributor

- ▶ Charter Communications - *Charter Center Stage*
- ▶ Comcast Spotlight - *Comcast Spotlight Take Five for Your Future 2011*
- ▶ Time Warner Cable Media - *Summertime is Cabletime*
- ▶ Time Warner Cable Media - *Domino's/ClickedIn*

Digital Marketing Campaign - Programmer

- ▶ EPIX - *The Long Khan, an interactive promotion for EPIX Pictures Presentation: The Captains*
- ▶ Starz Entertainment, LLC - *Scandalous Dirt, political aggregator site for the STARZ Original series Boss*
- ▶ Turner Sports - *RaceView Launch*

Digital Team of the Year

- ▶ AMC Networks
- ▶ Comcast - NBCU
- ▶ Discovery Communications
- ▶ ESPN
- ▶ Time Warner Cable
- ▶ Turner Sports

Editorial Excellence

- ▶ AMC - *AMCtv.com*
- ▶ Central Florida News 13 - *cfnews13.com*
- ▶ History - *CIVIL WAR 150 interactive*
- ▶ The Weather Channel - *The Weather Channel - Hurricane Irene coverage*

Official Show Website

- ▶ BBC Worldwide Limited - *Doctor Who - www.bbcamerica.com/doctorwho*
- ▶ nuvoTV - *Model Latina Las Vegas Website: mynuvotv.com/model-latina-las-vegas*
- ▶ Oxygen Media, LLC - *The Glee Project Digital Campaign*
- ▶ WE tv - *Braxton Family Values Show Section*

Original Content

- ▶ AMC - *The Trivial Pursuits of Arthur Banks*
- ▶ E! Entertainment - *E! News Now*
- ▶ FEARnet - *FEARnet's Jobs of the Damned*
- ▶ G4 - *G4 Films Epictober Fil Festival*
- ▶ History - *CIVIL WAR 150 interactive*
- ▶ Scripps Networks Interactive - *HGTVRemodels' Bathroom Planning Guide*

Podcast or Videocast

- ▶ Comcast SportsNet Mid-Atlantic - *Football Friday - CSNWashington.com*
- ▶ Turner Sports - *NCAA March Madness On Demand*
- ▶ Turner Sports - *PGA Championship LIVE Streaming Player*
- ▶ YES Network - *Off the Wall*

Smartphone App

- ▶ AMC - *AMC iPhone App*
- ▶ Bravo Media - *Bravo Now App*
- ▶ CNBC - *CNBC PRO*
- ▶ ESPN - *WatchESPN*
- ▶ Turner Sports - *93rd PGA Championship iPhone Mobile App*

Social Media Campaign

- ▶ 360i - *Bravo Top Chef Just Desserts: Surprise & Delight*
- ▶ Central Florida News 13 - *The Case Against Casey Anthony*
- ▶ Crown Media Networks - *Hallmark Channel's Countdown to Christmas*
- ▶ Discovery Communications - *Science's An Idiot Abroad Social Media Campaign*
- ▶ IN DEMAND - *Movies On Demand Facebook App*
- ▶ Oxygen Media, LLC - *The Glee Project Social Media Campaign*

Supplemental Web Campaign

- ▶ AMC - *The Walking Dead*
- ▶ Bravo Media - *Bravo Digital Media*
- ▶ RLTV - *Making Medicine Work for You*

Tablet App

- ▶ Comcast Spotlight - *1 + iPad App*
- ▶ E! Entertainment - *Live from the Red Carpet App*
- ▶ ESPN - *WatchESPN*
- ▶ National Geographic Channel - *Locked Up Abroad*
- ▶ The Weather Channel - *The Weather Channel App for iPad redesign*

Use of Facebook

- ▶ E! Entertainment - *E! Royal Wedding*
- ▶ IN DEMAND - *Movies On Demand Facebook App*
- ▶ National Geographic Channel - *9/11 Facebook Application*
- ▶ TLC - *TLC's Cake Boss Facebook Page*

Use of Twitter

- ▶ Discovery Communications - *Discovery Channel's @SharkWeek*
- ▶ E! Entertainment - *E! Celebri-tweet*
- ▶ Oxygen Media, LLC - *The Glee Project Social Media Campaign*
- ▶ Turner Sports - *NCAA March Madness On Demand Social Arena*
- ▶ WICT - *@WICT*

Use of Video/Moving Image

- ▶ AMC - *Video Inside Breaking Bad*
- ▶ CNBC - *CNBC Explains*
- ▶ Starz Entertainment, LLC - *Camelot NY Post Animated Rich Media Interstitial & Takeover*
- ▶ Turner Sports - *NASCAR.COM RaceBuddy*
- ▶ Turner Sports - *NASCAR.COM's Garage Cam*

Video Editor/Producer

- ▶ Discovery Communications - *James Williams*
- ▶ Travel Channel - *Jim Morley*
- ▶ YES Network - *Joe Auriemma*

Web Content Director

- ▶ MSG Varsity - *Jonathan McCarthy*
- ▶ WE tv - *Andrea Macey*
- ▶ YES Network - *Kevin Sullivan*

Web Site Design/Redesign

- ▶ FEARnet - *FEARnet's Trick 'r Treat Campaign*
- ▶ MSG Varsity - *MSGVarsity.com*
- ▶ WE tv - *WETv.com*

ANNOUNCED: The TV Everywhere Leadership Awards: Comcast & Turner Broadcasting System

Winners announced and Mid-Day Report released during the May 21st awards breakfast. Congratulations to all of the finalists!

To register for the event, visit www.CableFAX.com/events

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JB Perrette

Chief Digital Officer, Discovery Communications

Drew Pisarra

VP, Digital Media, AMC

Jennifer Robertson

SVP, Digital Media and Business Development, WE tv

Jeff Simmermon

Director of Digital Communications, Time Warner Cable

Michael Spirito

VP, Business Development and Digital Media, YES Network

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VP/Executive Producer, CNBC.com, CNBC

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EVP, Digital, AETN

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appointment of a new CMO 'newsworthy' the hiring of such a prestigious marketer is important for DISH, in our opinion, as we believe one of the company's issues has been lack of a clear brand image," **Wells Fargo Securities** said in a research note. Moorhead most recently led the strategy and marketing for Gillette products. Before that, he oversaw Old Spice and is credited with the brand's revival. Moorhead takes over for interim CMO *Vivek Khemka* who will return to his leadership over DISH's product management organization. Khemka will report to Clayton. -- While **Verizon** is awaiting word on an appeal to rulings related to **ActiveVideo's** patent lawsuit, it's working with vendors **Cisco** and **Ericsson** to redesign its VOD system. "FiOS TV customers have seen—or will soon see—a message on their guides regarding maintenance related to this redesign," a spokesperson said. The maintenance already has been completed in some markets and will take place in all FiOS regions over the next month. ActiveVideo said it would be "imprudent" to comment until it and the court has a chance to review the redesign. "We're hopeful that Verizon is indeed ceasing its infringement on our technology, and that the next step will be the payment of almost \$250mln in court-ordered damages, interest and royalties due ActiveVideo for infringing of our patents," said ActiveVideo CEO *Jeff Miller* in a statement. "Once we gain access to the new system and evaluate it we will decide if filing a contempt motion is warranted."

Switch Hitter: **DirectTV** has a new sub, and the fact it offers **Fox Sports San Diego's Padres** games and **Time Warner Cable** doesn't is a big factor. A tweet Wed from Padres pres/COO *Tom Garfinkel's* Twitter account said he switched from TWC to DirecTV Tues. "More channels, better picture," he wrote. Garfinkel was responding to a fan, who asked how the club feels that less people in San Diego can watch the games this year compared to last. "Not true," he replied. "Last year many had no choice of having games. This year, almost everyone has option of switching to DirecTV." **Cox** previously had the games on its terrestrially delivered Cox 4, which meant it didn't have to make them available to DirecTV, **AT&T** and other competitors. If Garfinkel's tweet was a clear enough indicator, we hear Fox and TWC are still very far apart. AT&T U-Verse also is lacking a deal.

Advertising: **BlackArrow** unveiled a new solution that lets MVPDs open dynamic advertising to programmers, letting nets expand the sale, placement and measurement of dynamic ad insertion across IP and traditional pay TV platforms. Programmers can manage metadata and avails, or placement opportunities, against their content. They also can specify how ad loads change through programming windows, such as C3 measurement. BlackArrow said the tech is commercially deployed and in trials with major ops.

Hollywood Creative Forum: Reality TV trends may come and go, but one thing is constant: The need for something new. So said several alt programming gatekeepers gathered Wed at the **Kaitz Foundation's** 3rd annual Hollywood Creative Forum in L.A. "I'm just looking for something that will change a genre or add a new genre," **nuvo TV** vp, development *Sara Auspitz* told the select group of invite-only producers, writers and execs who had just spent 3 hours in meet-and-greets with various network brass. She noted the impact of **Bravo's** "Queer Eye for the Straight Guy" when it 1st came out. "That show at the time was really loud and different," she said. **SyFy** vp, alternative distribution *Wayne Sampson* said the net's success with reality competition show "Face Off" about creature make-up artists going head to head took a sci-fi concept and broadened it for a wider audience. "You guys have got to do the same thing," he said. **Cooking Channel** gm *Michael Smith* urged producers to push concepts to the next level. "Bring us the ideas that are just a little ahead of the curve," he said, adding that some of the best pitches already include well-thought out marketing plans using tools like social media. "It makes the risk of green-lighting the show lower for us." Sampson said he's aggressively seeking people with digital backgrounds and who know how to use those tools to drive viewership. Auspitz urged caution, however, noting that digital buzz often doesn't translate to bigger linear numbers. "It's not trending into ratings," she said. "And at the end of the day, that's what we need." **[More on the meet-and-greet aspect of the Forum in the Programmer's Page in Fri's issue]**

Programming: **Entertainment Studios** inked a multi-year distribution deal for 6 of its HD cable nets with **Vivicast Media**, a global content aggregator that places content on new media platforms. The nets in the deal are: **Cars.TV**, **Comedy.TV**, **ES.TV**, **MyDestination.TV**, **Pets.TV** and **Recipe.TV**. -- **Disney XD** ordered "Crash & Bernstein," a live-action comedy with puppets (boy with a houseful of sisters finally gets boy reinforcement when his male puppet comes to life). It's slated for a fall premiere. -- Ahead of "Locked Up Abroad's" Apr 25 Season

BUSINESS & FINANCE

6 premiere, **Nat Geo** is rolling out "Locked Up Abroad: Popped," based of **VH1's** "Pop-Up Video" and featuring 4-hours of bubbled bits of knowledge, Apr 20, 8pm.

People: **USA** promoted *Alexandra Shapiro* to evp, marketing and digital. She adds creative oversight to her purview. She takes over the full marketing responsibilities from *Chris McCumber*, who was appointed **USA** co-pres a year ago.

On the Circuit: **WICT** announced 120 designees for its "Rising Leaders Program," which is comprised of emerging talent with 5-7 years of professional experience. Nearly 200 women applied for the 120 available slots. A grant from the **Kaitz Foundation** will support 8 full scholarships in this year's program. **Comcast** is serving as the Silver Sponsor of the program. **Suddenlink** is the Bronze Sponsor, and **Turner** is the Patron Sponsor. See the full list of designees at wict.org. -- **SCTE** issued the call for proposals for papers and presentations for technical sessions that will be conducted during Cable-Tec Expo, Oct 16-19, Orlando. -- **NCTA** holds a panel discussion on the Japan earthquake and tsunami and its impact on the country's telecom structure, Apr 18 at its DC HQ. Scheduled speakers include **NTT East's** sr evp *Masahide Oka* and **NCTA** pres/CEO *Michael Powell*.

CableFAX Daily Stockwatch

Company	04/11 Close	1-Day Ch	Company	04/11 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
DIRECTV:	49.00	0.59	CLEARWIRE:	2.12	0.07
DISH:	31.93	0.53	CONCURRENT:	3.60	(0.19)
DISNEY:	41.37	0.38	CONVERGYS:	13.05	0.09
GE:	19.01	0.27	CSG SYSTEMS:	14.70	0.33
NEWS CORP:	19.12	0.20	ECHOSTAR:	26.94	0.53
MSOS					
CABLEVISION:	13.43	0.02	GOOGLE:	635.96	9.10
CHARTER:	60.56	1.15	HARMONIC:	4.89	0.14
COMCAST:	28.98	0.33	INTEL:	27.85	0.40
COMCAST SPCL:	28.59	0.27	JDSU:	12.86	0.21
GCI:	8.19	0.25	LEVEL 3:	25.33	1.08
KNOLOGY:	17.71	0.23	MICROSOFT:	30.34	(0.12)
LIBERTY GLOBAL:	47.84	0.19	MOTOROLA MOBILITY:	39.19	(0.18)
LIBERTY INT:	18.51	0.20	RENTRAK:	19.05	0.56
SHAW COMM:	20.64	0.28	SEACHANGE:	8.11	0.06
TIME WARNER CABLE:	79.07	1.30	SONY:	18.75	0.51
VIRGIN MEDIA:	24.22	UNCH	SPRINT NEXTEL:	2.75	0.09
WASH POST:	379.20	5.51	THOMAS & BETTS:	71.76	UNCH
PROGRAMMING					
AMC NETWORKS:	42.51	0.86	TIVO:	11.10	0.08
CBS:	31.64	0.34	UNIVERSAL ELEC:	17.54	0.14
CROWN:	1.53	0.03	VONAGE:	2.11	0.12
DISCOVERY:	50.71	0.97	YAHOO:	14.88	(0.12)
GRUPO TELEVISA:	20.38	(0.03)	TELCOS		
HSN:	37.30	1.29	AT&T:	30.45	0.32
INTERACTIVE CORP:	48.29	0.68	VERIZON:	37.38	0.58
LIONSGATE:	12.78	0.16	MARKET INDICES		
LODGENET:	3.54	0.12	DOW:	12805.39	89.46
NEW FRONTIER:	1.51	0.01	NASDAQ:	3016.46	25.24
OUTDOOR:	7.21	0.20	S&P 500:	1368.71	10.12
SCRIPPS INT:	46.83	0.75			
TIME WARNER:	35.72	0.31			
VALUEVISION:	1.94	0.09			
VIACOM:	50.00	(0.12)			
WWE:	8.24	0.02			
TECHNOLOGY					
ADDVANTAGE:	2.51	0.08			
ALCATEL LUCENT:	2.04	0.06			
AMDOCS:	31.17	0.33			
AMPHENOL:	57.64	0.49			
AOL:	24.31	(0.51)			
APPLE:	626.20	(2.24)			
ARRIS GROUP:	10.95	0.05			
AVID TECH:	10.28	0.10			
BLNDER TONGUE:	1.25	0.04			
BROADCOM:	36.54	0.61			
CISCO:	20.02	0.47			

The CableFAXIES awards

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May 1, 2012

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Think about that for a minute...

EIGHTEEN CLICKS

Commentary by Steve Effros

I decided to catch up this week. With the beginning of a new season of HBO's "Game of Thrones" being heralded, and folks I respect telling me that it really is a very well done series, it was time to check it out. Since I had never watched an entire episode, the logical thing to do was to start at the beginning of season one and work my way through.



This is the wonder of television these days. With the archiving of programming, viewers can partake of lots of the "oldies but goodies" and can also go back and sample those shows that have earned a reputation for worthwhile watching without having to invest the initial time of watching a new program that may not be worth it. We'll get

into the implications of all that for the programming and marketing of channels and programs some other time. For now, I just wanted to start watching the series from the beginning to see if I liked it.

Oh, and I wanted to watch it in HD. I wouldn't have thought that was important, but it turned out it was. Not the HD itself, I watch just about everything in HD. It's a better picture. But the challenge was finding what I wanted to watch, and I had no idea it would be a "challenge!"

I have Verizon's FiOS service. I signed up, several years ago, to see what the competition was doing, and because I wanted to see what the "latest" in navigation looked like. As long-time readers know, I think navigation is one of the key competitive aspects of the business going forward. It's the user experience that is going to make all the difference since the technology—whether it's "fiber" or "HFC"—is more than capable of delivering an excellent digital picture.

Well, navigating to what I wanted wound up being far more complicated than I expected. "Search" gave me the new, season two shows, but not the archived season one. Then I was given the option of "Pay Per View" or "Video on Demand." I settled for VOD because I already subscribe to HBO, so the archived programming should be "free." I'll leave out the commentary on that term for now.

Clicking through the options to my "Premium Channels" ultimately got me to HBO and finally, after finding "Series," to "Game of Thrones" only to find that it wasn't available in HD! I gave up, went to my Roku box and found what I wanted through HBO Go. Streaming is always an iffy proposition, with "please wait" pauses, but at least I got what I wanted.

A second trip through all the FiOS navigation screens revealed that there is a separate category for "HD" and hidden behind that is all the same selectivity (Series, Program, etc.) as on the main screen. Why they did that is beyond me, but I finally know how to get what I want. Eighteen clicks is all it takes!

The moral of this story is that we still have a long way to go to improve the user experience, and that's what competition in the future is going to be about. The programs (for now) and delivery technology (at least to the home) are becoming commoditized. Service, navigation and user devices—including set tops, remotes, game consoles and integrated displays and interfaces—are not. As the Apple iPhone proved, the device and user interface provided by the system can be just as important as the delivery system itself.

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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