

CableFAX Daily™

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What the Industry Reads First

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New View: McSlarrow Reflects on Life at Comcast, NBCU

It's been just over a year since *Kyle McSlarrow* left his post atop **NCTA** to become pres, **Comcast/NBCU DC**. In his 1st interview since joining the company, McSlarrow spoke about what his job entails and why you might spy him in a Comcast truck rolling around DC. The job, new for Comcast, is divided into 3 buckets: public policy, business strategy/ad hoc projects, the Beltway region (spans DE through southern VA—1.3mln subs). Public policy is probably the most familiar of those. The business strategy side of the job includes working with Comcast Customer Experience Council, a cross-disciplinary look at the end-to-end customer experience. For the Beltway region, McSlarrow works directly with the regional team, including Comcast Cable regional svp *Tom Coughlin*. "I'll spend time with CAAs on the phone. Go out on truck rolls because we have a customer issue or we're looking at the network. It's a real mixture," he said of the job. **Has there been any aspect of the job that surprised you?** I thought I knew the cable industry pretty well, but particularly on the business/operations side, I discovered that I really only knew about 10% of what I needed to know. It's a steeper learning curve on that side, but one I really enjoyed... It's so much more granular. At NCTA, I was dealing at a much more strategic level. Here, particularly on the operations side, I'm dealing often with individual customer issues or individual network challenges. There is a learning curve on the technical side, but also the operational side—from what CAAs do on the phone to how the techs actually function. All things I wanted to learn. **Do you have more fires to put out at Comcast or were there more at NCTA?** Probably more at NCTA because I had all of Comcast plus everyone else. You'll always have public policy fights and fires, that's a given. But for me, the biggest challenge and what I'm really focused on is that I believe this region—particularly the DC metropolitan area—can and should be a flagship operation for the company. We inherited these systems. We've upgraded them a few times... but there's still work to be done to improve not just customer service, which is certainly one area, but the complete operation. **How has the Comcast-NBCU merger changed the way the Washington operations for Comcast work?** From my perspective, it's gone really well. We each know what our responsibilities are. We have a team that actually carries business cards that say NBCUniversal, but they're part of 1 team in DC when it comes to public policy, and we all coordinate very well together. **How does Comcast handle retrans when it comes at it from both sides?** So far, our going-in proposition is that we think the marketplace works pretty well. We don't

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have our heads in the sand. Interestingly, the history of Comcast on the cable side and NBC on content side has been that they have always been able to work it out. On retransmission consent, I think our posture is that we want to be careful, we want to be helpful because we do actually bring a couple of different perspectives. But at the end of the day, we're not on the side of 'hey, let's just go break all this up and start over.' We acknowledge that things happen in the marketplace... that are going to cause stresses and strains, but we're going to work through that. We're also going to be open to constructive ideas. But that doesn't necessarily mean that you should leap to the conclusion you need a legislative change. **Are there any components of the calls for reform that Comcast supports?** At this point, we're looking at ideas, but I don't think we've reached any conclusions. **What are you looking to get out of the Cable Show next month?** I went last year, which was right after I left. Surreal experience. I had to actually learn about the Cable Show because I was so used to being completely overscheduled. This year, I think I have a little better sense of it. I actually think the floor still is the core of the show. The combination of that and the general sessions always seem the most interesting to me. When I was at NCTA, I literally might have been on the floor for 10 minutes total during that week. It's kind of nice to really spend the time and look at products and exhibits. *[More from our interview with Kyle McSlarrow is available at www.CableFAX.com].*

In the States: Time Warner Cable added several national and regional sports nets to its live streaming TWC TV app for iPad, iPhone and Android (also TWCTV.com) in 3 markets. Technical issues surrounding the blackout of games had prevented TWC from offering sports fare previously. The MSO said it's working with industry partners to implement a broader technical solution that will allow it to offer more sports on TWC TV in additional markets. Customers in NYC (except Hudson Valley) now have access to **ESPN, ESPN2, TNT, TBS, YES, SNY, MSG, MSG+, MLB, NBA and NHL**. In Dallas, subs get ESPN, ESPN2, TNT, TBS, **Fox Sports Southwest, MLB, NBA and NHL**. Charlotte's lineup: ESPN, ESPN2, TNT, TBS, **Fox Sports Carolinas, SportSouth, MLB, NBA and NHL**.

Disney Doings: When news of Rich Ross' departure as chmn of Disney's movie studio broke Fri, we wondered if there are any cable nets that might be interested in him (and vice versa). For the record, Ross said "I no longer believe that the chairman role is the right professional fit for me." Sure John Carter was a flop, but think of all those **Disney Channel** hits...

Carriage: FEARnet scored some new launches, with Time Warner Cable adding it in L.A., Palm Springs, Barstow, Yuma, Columbus, Austin, Milwaukee, Hawaii and Lincoln, NE. Cox also launched the channel in the New Orleans market.

Talking Ticket: ISI Media's Vijay Jayant believes DirecTV needs to add 1.6mln to 3mln subs from its existing sub base to break even on the \$1bln annual cost of its new NFL Sunday Ticket packages (*Cfax*, 4/20). Because DirecTV loses money on existing Sunday Ticket subs, even if DirecTV adds fewer paying subs than that, it can still break even, Jayant wrote in a research note. "Depending on the mix of subscriber tier, DirecTV will need to add between 100K and 1.1mln paying subscribers in order to increase revenues. We believe this is achievable as DTV added 1.1mln subs last year after they announced their promotional offer," he said.

Union Jack: Masked fortune tellers, tarot card readings, plush red drapery and gothic ballerinas populated BBC America's upfront celebration at Skylight SoHo in NYC Thurs evening. A few highlights from the event's spectacular decor, themed "From the Other Side:" corseted ladies hung from hoops replenishing attendees' champagne flutes, a woman encased in a blanket of candlewax and, in a special performance, dancers wielding fire-rimmed hoops threatening to light up the scaffolding. The night conveyed decadence and confidence. Now that BBC America is in 77mln+ homes, the net is focused on sustaining its growth while taking it to the next level, in terms of BBCA's ratings profile and building its fan base. Its strategy entails "enhancing our core programming, the best of the BBC and the UK, and complementing that with some original series that help give the channel its own voice and broaden its audience," Perry Simon, gm, Channels, BBC Worldwide America, told **CableFAX**. Just launched are its 1st original primetime series, "No Kitchen Required," a show incorporating food, travel, adventure and culture, and "Richard Hammond's Crash Course." On the unscripted side, he added, they're taking "2 of our biggest unscripted tent poles, being 'Top Gear' and Gordon Ramsay programming, and using those as platforms to launch new series that are compatible with audiences." The net's also premiering "Planet Earth" with its original narrator for the first time in the US, and Aug 17 will premiere its 1st original scripted drama, a BBCA co-production called "Cooper," set in 1860s New York in the immigrant community of Five Points.

2012

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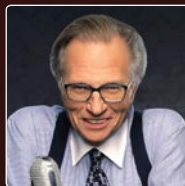
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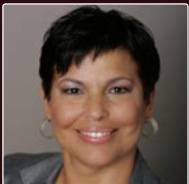
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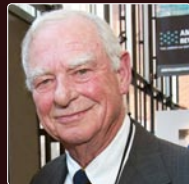
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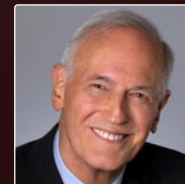
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CableFAX Week in Review

Company	Ticker	4/20 Close	1-Week % Chg	YTD %Chg
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BROADCASTERS/DBS/MMDS

DIRECTV:	DTV	48.13	(1.98%)	12.56%
DISH:	DISH	31.65	(0.13%)	11.13%
DISNEY:	DIS	42.35	1.19%	12.93%
GE:	GE	19.36	(0.67%)	8.10%
NEWS CORP:	NWS	19.35	(2.07%)	6.44%

MSOS

CABLEVISION:	CVC	13.79	4.39%	(3.02%)
CHARTER:	CHTR	61.96	1.62%	8.82%
COMCAST:	CMCSA	29.45	(0.37%)	24.21%
COMCAST SPCL:	CMCSK	29.10	(0.24%)	23.51%
GCI:	GNCMA	7.65	(1.29%)	(21.86%)
KNOLOGY:	KNOL	19.42	10.28%	36.76%
LIBERTY GLOBAL:	LBTYA	49.62	1.85%	20.94%
LIBERTY INT:	LINTA	18.52	(1.28%)	14.18%
SHAW COMM:	SJR	20.12	2.08%	3.87%
TIME WARNER CABLE:	TWC	81.89	1.88%	28.82%
VIRGIN MEDIA:	VMED	23.84	(5.88%)	11.51%
WASH POST:	WPO	382.39	(1.31%)	1.48%

PROGRAMMING

AMC NETWORKS:	AMCX	42.89	0.40%	14.13%
CBS:	CBS	33.31	2.46%	22.73%
CROWN:	CRWN	1.53	10.07%	26.45%
DISCOVERY:	DISCA	52.46	1.47%	28.04%
GRUPO TELEVISIA:	TV	20.30	1.10%	(3.61%)
HSN:	HSNI	37.60	1.13%	3.70%
INTERACTIVE CORP:	IACI	47.43	(2.91%)	11.34%
LIONSGATE:	LGF	11.94	(5.09%)	43.51%
LODGENET:	LNET	3.83	4.36%	60.25%
NEW FRONTIER:	NOOF	1.50	(1.96%)	45.63%
OUTDOOR:	OUTD	6.91	(3.63%)	(7.37%)
SCRIPPS INT:	SNI	48.96	2.92%	15.42%
TIME WARNER:	TWX	36.60	2.55%	1.27%
VALUEVISION:	VVTV	1.79	(1.1%)	(4.79%)
VIACOM:	VIA	51.32	1.56%	(3.77%)
WWE:	WWE	7.99	(1.48%)	(14.27%)

TECHNOLOGY

ADVANTAGE:	AEY	2.42	(3.2%)	15.24%
ALCATEL LUCENT:	ALU	1.85	(13.95%)	18.59%
AMDOCS:	DOX	31.83	0.92%	11.57%
AMPHENOL:	APH	57.68	(1.89%)	27.08%
AOL:	AOL	25.00	(3.06%)	65.56%
APPLE:	AAPL	572.98	(5.33%)	41.48%
ARRIS GROUP:	ARRS	11.47	3.52%	6.01%
AVID TECH:	AVID	8.31	(3.6%)	(2.58%)
BLNDER TONGUE:	BDR	1.22	0.83%	0.00%
BROADCOM:	BRCM	34.77	(5.28%)	18.43%
CISCO:	CSCO	19.91	0.30%	10.12%
CLEARWIRE:	CLWR	1.67	(21.23%)	(13.92%)
CONVERGYS:	CVG	13.33	3.65%	4.39%
CSG SYSTEMS:	CSGS	14.52	0.21%	(1.29%)
ECHOSTAR:	SATS	27.57	1.55%	31.66%
GOOGLE:	GOOG	596.06	(4.57%)	(7.72%)
HARMONIC:	HLIT	4.56	(5.2%)	(9.52%)
INTEL:	INTC	27.60	(1.74%)	13.81%

Company	Ticker	4/20 Close	1-Week % Chg	YTD %Chg
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JDSU:	JDSU	12.95	(0.38%)	24.04%
LEVEL 3:	LVL3	23.20	(8.16%)	36.55%
MICROSOFT:	MSFT	32.42	5.23%	24.88%
MOTOROLA MOBILITY:	MMI	38.83	(0.79%)	0.08%
RENTRAK:	RENT	19.64	6.97%	37.54%
SEACHANGE:	SEAC	8.31	2.59%	18.21%
SONY:	SNE	16.83	(3.05%)	(6.71%)
SPRINT NEXTEL:	S	2.37	(11.57%)	1.28%
THOMAS & BETTS:	TNB	71.92	0.15%	31.72%
TIVO:	TIVO	10.76	(4.78%)	19.96%
UNIVERSAL ELEC:	UEIC	16.28	(3.67%)	(3.5%)
VONAGE:	VG	2.06	0.98%	(15.92%)
YAHOO:	YHOO	15.60	4.91%	(3.29%)

TELCOS

AT&T:	T	30.86	1.05%	2.05%
VERIZON:	VZ	38.73	2.84%	(3.46%)

MARKET INDICES

DOW:	DJI	13029.26	1.40%	6.64%
NASDAQ:	IXIC	3000.45	(0.36%)	15.17%
S&P 500:	GSPC	1378.53	0.60%	9.62%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. KNOLOGY:	19.42	10.28%
2. CROWN:	1.53	10.07%
3. RENTRAK:	19.64	6.97%
4. MICROSOFT:	32.42	5.23%
5. YAHOO:	15.60	4.91%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. CLEARWIRE:	1.67	(21.23%)
2. ALCATEL LUCENT:	1.85	(13.95%)
3. SPRINT NEXTEL:	2.37	(11.57%)
4. LEVEL 3:	23.20	(8.16%)
5. VIRGIN MEDIA:	23.84	(5.88%)



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