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Thursday — May 13, 2010

What the Industry Reads First

Volume 21 / No. 092

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Facing Reality: Execs Look to Make Multiplatform Work for All

When it comes to multiplatform, the perception gulf between content owners and distributors seems to be narrowing—with most accepting the “reality” that even those who often compete must also work together. That was the basic message of Wed morning’s general session, with a heavy-hitting panel of CEOs and content power brokers publicly shedding worries that once caused night sweats, shrugging their shoulders and collectively saying, “We gotta make this work.” As consumers demand full content flexibility, **Comcast** chmn/CEO *Brian Roberts* said the threat-vs-opportunity debate needs to end: Cable must turn it into opportunity. Period. Even if that means embracing new devices and technologies over its own. “We’ve got to get on that bus,” he said. “We can’t stay on our bus.” The key question, he said, is “how do we embrace these technologies but not throw away old business models?” Roberts showed a video to the audience demoing the MSO’s new iPad app that lets consumers control their set-tops wirelessly via the iPad—even letting viewers suggest shows to friends, whose own iPads could then switch their set-tops automatically to the same channel. **Time Warner** chmn/CEO *Jeff Bewkes* said improving the set-top experience is an important component in making content seamless across platforms, noting VOD’s current drawbacks. “Get your VOD robust,” he said. “Get your interfaces to be stronger and better. Use the advances you see on the Internet and put it on your television.” **CBS Corp** pres/CEO *Les Moonves* said the various content and distribution camps are starting to work more collaboratively with “mutual respect” as everyone starts to “realize that we need each other.” He endorsed the industry’s efforts with authentication as a key way to make sure content owners get paid. **Fox Filmed Ent** chmn/co-CEO *Tom Rothman*, however, said the movement against “windowing” in favor of putting content everywhere at once is dangerous for content owners because it could limit monetization. “We gotta get paid,” he said. But despite Rothman’s concerns, Roberts lauded “tremendous progress” on shortening windows as content owners and distributors try to balance their interests. “We’re delighted to hear this conversation because it’s been a long time coming,” he said. In the end, Rothman said the various camps will do what they always do when faced with new tech: manage the transition and ultimately figure it out.

ESPN ‘Practicing’ in 3D: To the naked eye, it will look like a semi-pro football team running the same play 20 times. Actually, it will be practice for **ESPN** personnel, who will be taping the proceedings in 3D, **ESPN 3D** chief *Bryan Burns* told

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Source: Beta Research, Brand Identity Study, 3/10. Among viewers 25-54 DIY #1, Food Network #2, HGTV #3

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reporters at lunch Wed. Experienced sports directors “need a complete mindset change” when they work in 3D since they can’t follow fast-moving objects as they did when telecasts were shot in SD or HD, Burns says. “It’s entirely different... it’s a learning process.” At the moment, ESPN only has plans to practice its camerawork on football, Burns said. ESPN 3D personnel will need the practice—besides presenting 25 World Cup soccer matches in June, ESPN 3D plans to carry “at least 65” more games in the next 11 months, Burns said. More could be added. “We’re not sure how far and fast to fly this plane yet” he said. But fly it will, perhaps shockingly fast. **Motorola** vp/gm, networked video and broadband home solutions **Bob Wilson** notes “the majority of existing [HD] set-tops in the field” can handle 3D. As for numbers, Wilson said he’s seen projections of 1.5m 3D TVs purchased by year-end ’10. And “pricing is already aggressive,” said **Time Warner Cable** vp, subscriber devices **Bill Helms**. Burns feels adoption might be much faster than with HD. With HD, the consumer only knew about how good it was after having seen a demonstration. “But you’ve seen ‘Avatar’ and ‘Alice in Wonderland,’ so you know how [3D] is supposed to look.” But there are hurdles, including differing approaches to 3D glasses, Wilson said. And cost. Although ESPN is working on using a portion of a 3D feed to down-convert to HD, it’s not available yet and it’s not certain it will provide the best customer experience,” says **Gary Traver**, svp/COO, **Comcast Media Center**. So the network will need to use separate crews for HD and 3D carriage of a game, and 2 sets of announcers. -- **Comcast** is the 1st affil to sign on for carriage of ESPN 3D and will launch the offering Jun 11 to coincide with the net’s World Cup coverage. The MSO will also feature select net events via VOD.

Business Speak: Cable has “an expensive plant” that can “do a lot of great things” but it has lost sight of its “core business,” **Citigroup’s Jason Bazinet** said during **NCTA’s** Wall St panel. “Your customer satisfaction scores” are terrible and “you’re losing basic subs... there’s no reason you shouldn’t be growing basic subs... take care of your customers.” **Sanford Bernstein’s Craig Moffett** noted his concern that \$80/month for basic cable is too expensive for the bottom two quintiles of the population. Cable’s business structure makes it imperative to serve 100% of the population, he said. At its core, cable is infrastructure, he said, adding that the major threat to cable would be if someone devised an infrastructure advantage over cable, like broadband over powerline, for example, although that hasn’t been feasible yet. Building a 2nd infrastructure doesn’t work, as **Verizon FIOS** shows, he said. On the upside, **John Hodulik** of **UBS** believes the business sector could “really move the needle” for cable. He also slashed Verizon; “they’re not making money [with FIOS]... they’ll have to raise prices.” **Jessica Reif-Cohen** of **Bank of America** warned against rising program costs. Cable nets with international properties will fare better as they have growth potential overseas, she said.

On the Hill: At last, the **Satellite TV Extension and Localism Act** received final passage with the **House** voting it out Wed morning. It clears the way for **DISH** to offer distant signals again in exchange for offering local-into-local in a couple dozen additional markets. It also helps cable by addressing phantom-signals, where cable ops have royalty payments for some subs who aren’t getting distant signals. -- PA’s 2 democratic Senators, **Arlen Specter** and **Bob Casey Jr**, are asking the **FCC** to complete its review of the proposed **Comcast-NBCU** transaction in a timely manner. “We believe that, after a fair and thorough examination, the FCC will find that this joint venture advances the national communications policy goals



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A photograph of Oprah Winfrey smiling broadly and pointing towards the viewer. She is wearing a yellow, white, and black patterned top with a gold beaded necklace. The background is a warm, golden bokeh pattern.

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Launching 1/1/11

of diversity, localism, innovation and competition,” the 2 wrote in a letter Tues to FCC commissioners.


Regulatory View: Cable might not love the idea of Title II Lite, but the industry got kudos Wed from FCC staffers for its measured response to the chmn’s proposal. FCC gen counsel *Austin Schlick* thanked the industry for its “responsible tone” in a panel where he made the case classifying broadband transmission services under Title II and forbearing all but 6 provisions of the section. Schlick dismissed the idea that future FCC regimes might undo forbearance of Title II provisions such as rate regulation or unbundling. “In the 17 years we’ve been forbearing, we’ve never reversed a forbearance decision,” he said, arguing that un-forbearing would be difficult because the FCC would have to prove there were changes in the marketplace. -- **NCTA** chief *Kyle McSarrow* tried unsuccessfully to get **RUS** admin *Jonathan Adelstein* and NTIA chief of staff *Tom Powers* to agree to stop giving broadband subsidy dollars to projects that overbuild existing broadband areas during Wed’s Public Policy lunch. The 2 made their case for why it sometimes happens. FCC commish *Robert McSarrow* was supposed to be there, but missed it due to gallbladder surgery. McSarrow relayed that the Republican was fairly confident it happened because he “found it difficult to digest Title II,” but he wasn’t all that concerned because the surgeon assured him he would “operate with a light touch.”

TV Everywhere: Beginning next month, **FiOS TV** subs will receive free online access to programming from **TNT** and **TBS** such as “The Closer” and “Lopez Tonight,” including in HD, through either **Verizon.com/FiosTVonline** or soon-to-be launched TNT and TBS Websites by using their VZ Online user names and passwords. As Turner expects to launch additional networks during the remainder of the year, the telco also plans to provide online content at its dedicated site or nets’ portals from programmers including **Fox News**, **MTVN**, **Hallmark Channel** and **Tennis Channel**.

Hall of Fame: It seems **The Cable Center’s** concern that people wouldn’t know The Hall of Fame induction was being held during The Cable Show was unfounded. Attendance at Tues’ dinner met expectations, equaling the 600 who attended in ’09. “We’re happy. We hit our mark,” TCC chief *Larry Satkowiak* said in an interview. TCC also was happy with the reaction to an added feature at this year’s Hall of Fame—a video tribute to former TCC chair *Bill Bresnan*. The choice to emphasize Bresnan’s humor and humanity was embraced warmly by the crowd. Satkowiak said TCC’s endowment has raised \$6mln, and “we think [donations] will pick up a bit” this year. Once it reaches its \$10mln goal Satkowiak says TCC will run debt free, “which distinguishes us from other membership organizations.” While TCC lacks definite plans to expand its programmatic offerings, Satkowiak mentioned he’d like to update some of TCC’s oral histories, and a re-launch of the Center’s Web site will occur in the next few weeks. Funding for TCC’s Washington Classroom collaboration with **C-SPAN** ends in a year. “I am talking with everyone” to solidify continued funding, he said. Funding for the Cable Mavericks university speaker programs remains steady, he added.

Competition: To bring its HD channel offerings to more than 200, **DISH** added **Univision HD**, **TeleFutura HD**, **DIY HD**, **Investigation Discovery HD** and **EPIX 2 HD**. The DBS op will launch **Galavision HD** early next month.

Carriage: **HDNet** will expand into 5 new **Comcast** markets later this year: Philly, San Fran, Detroit, Seattle and Portland. In an interview at NCTA, HDNet chief *Mark Cuban* noted his appreciation that the deal also adds HDNet content to au-



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thentication trials. "We're big proponents of allowing subscribers to access television when, where and how they want it," Cuban said. "And we don't have the resources" to do the work on authentication "so we're glad Comcast is doing it." HDNet is investing in producing 3D content for distributors, however. At his booth Cuban treated visitors to 3D clips of Mavericks' basketball, several HDNet series featuring bikini-clad women and upcoming scripted comedy series "Svetlana."

In the States: Following the DC bow this month, **RCN** will launch the **TiVo Premiere DVR** in NYC early next month. -- **Buckeye CableSystem** agreed to deploy **BigBand's** IP video solution to extend its switched digital video infrastructure. -- **Broadstripe's** using **Net2Phone's** Centralized PacketCable voice solution throughout its WA, MI, MD and OR markets.

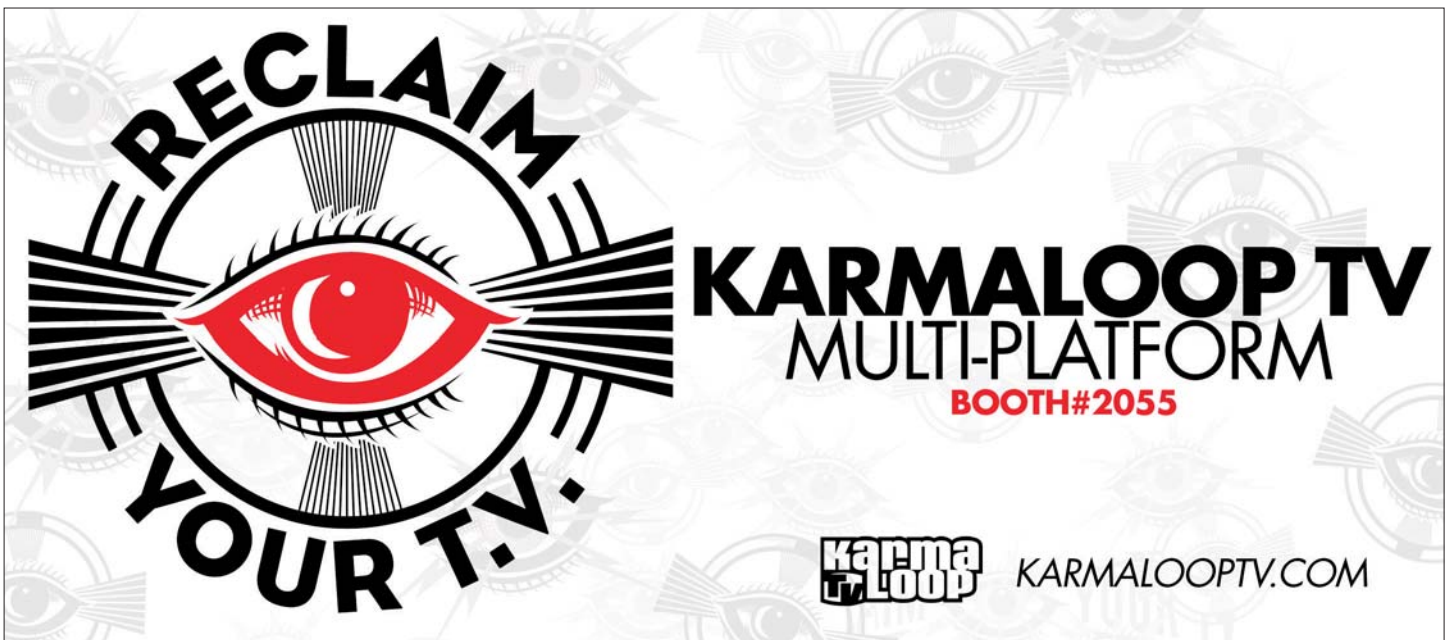
VOD: **Time Warner Cable** is partnering with **Univision** to provide the net's Spanish-language World Cup coverage (Jun 12-Aug 11) through its Hispanic FVOD channel **Lo Mejor On Demand** (available in L.A., San Diego, TX, NYC, the Carolinas and the NE). Also, **Time Warner Cable Deportes** and Univision will co-host Fri at The Home Depot Center Tennis Stadium in L.A. a special taping of net series "Sabado Gigante," hosted by *Don Francisco*.

Technology: **SeaChange** bowed a T-commerce service enabling ops to leverage existing VOD infrastructure to sell-through DVDs and related merchandise to subs. The service includes a set-top app, user interface customization and fully managed back-end order fulfillment. -- **This Technology** and **Sigma Systems** announced a turnkey cross-platform solution enabling ops to manage content, inventory and subscriber information across ad platforms. The solution is a bundle of backplane services defined by the **SCTE 130** standard for advanced ads that works with any front-end system also defined by the standard. -- **Brightcove** and **Freewheel** will offer by early next month a solution enabling media companies to deliver ad-supported video through **HTML5**-compatible devices, including the **Apple** iPad, iPhone and iPod Touch.

Affiliate Relations: The Cable Show was the 1st show featuring the recently combined affil sales teams of **GMC** and **Sportsman Channel**. Both nets are owned by **InterMedia**. "Having some level of scale allows you to be more effective in selling. While going from 1 to 2 is not an enormous leap in scale, it's better than 1," said Sportsman pres *Willy Burkhardt*. *Lisa Delligatti*, who is heading the team, said the 2 nets' demos are complementary.

Robbed Again!?: Ah, the sweet smell of silver...The *TV Rejects* took 2nd place Tues night in the **CableCares'** annual **Battle of the Bands** to benefit **A Place Called Home**, which helps inner city kids. It's the 2nd consecutive year that our band has fallen to our chief nemesis, **Cox's Xpanded Bandwidth**, which took the gold and blew everyone away (again). **Juniper Networks'** always impressive *Full Mesh* took 3rd. In truth, all the bands that competed Tues night did themselves proud. And despite not winning, our crew was happy that judge Bob the bachelor (who actually rocked hard during his headlining performance with "Band from TV") almost hyperventilated when he told us we were "awesome" (that's how we remember it, anyway). Just for the record, *TV Rejects* consists of *Seth Arenstein* (**CableFAX**), *Tommy Bullough* (**RLTV**), *Jim Clark* (**C-SPAN**), *Michael Grebb* (**CableFAX**), *Tim Hermes* (**Broadband Gear Report**) and *Rob Kennedy* (**C-SPAN**).

Public Affairs: Singer and **Autism Speaks** supporter *Toni Braxton* will appear in a pair of PSAs to air on **WE tv** this summer as part of the net's WE Volunteer campaign, which aims to motivate women to become more involved in



The advertisement features a large graphic on the left consisting of a stylized red eye with black eyelashes, set within a circular frame. The word "RECLAIM" is arched above the eye, and "YOUR TV." is arched below it. To the right of the eye graphic, the text "KARMALOOPTV" is written in large, bold, black capital letters, with "MULTI-PLATFORM" underneath it in a slightly smaller font. Below that, "BOOTH#2055" is written in red capital letters. At the bottom left, there is a small logo for "Karma Loop" with a TV icon, and to its right, the website "KARMALOOPTV.COM" is listed in black capital letters. The background of the entire advertisement is a repeating pattern of the stylized eye graphic.

BUSINESS & FINANCE

local communities by pledging community service hours. -- To combat prejudice and discrimination, **USA's** expanding this year its "Characters Unite" community affairs campaign to include original programming, MVPD sponsorship opportunities, expansive digital content and grass-roots community events. -- **Outdoor Channel** unveiled the "Outdoor Channel Corps," which aims to recruit 1mln conservation volunteers in the next 5 years.

Honors: **Nick** easily led cable with 25 **Daytime Emmys** nominations, with **Food Net** a distant 2nd with 8. Other cable net tallies: **HBO** (5), **Disney Channel** (5), **Cartoon Net** (4), **Style** (4), **Travel Channel** (2), **Fox Reality** (2), **A&E** (2), **Discovery Channel** (2), **CNN**, **GSN**, **ION**, **MTV** and **mtvU**.

People: **Turner Broadcasting** tapped *Deborah Bradley* as svp, program acquisitions. -- **The Hub** appointed *Mark Kern* svp, comm and *John Roberts* svp, digital content and cross-platform ent. -- **Sundance Channel** promoted *Beth Stein* to vp, marketing and *JC Cancedda* to vp, brand strategy.

Business/Finance: **Lionsgate** shareholders confirmed the co's shareholder rights plan by an approx 56-44 margin (including votes submitted by *Carl Icahn* and af-ils). LGF shareholders have until May 21 to tender shares in favor of Icahn's bid to acquire up to all of the co's shares for \$7 per in cash.

CableFAX Daily Stockwatch

Company	05/12 Close	1-Day Ch	Company	05/12 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
AOL:	24.50	0.41	APPLE:	262.09	5.57
BRITISH SKY:	35.73	0.30	ARRIS GROUP:	12.01	0.12
DIRECTV:	38.15	0.34	AVID TECH:	15.01	0.14
DISH:	22.37	0.58	BIGBAND:	2.91	0.05
DISNEY:	35.13	(0.63)	BLNDER TONGUE:	1.19	0.04
GE:	18.44	0.44	BROADCOM:	34.06	0.65
NEWS CORP:	17.02	0.16	CISCO:	26.74	0.78
MSOS					
CABLEVISION:	25.15	0.64	CLEARWIRE:	8.23	0.22
COMCAST:	18.18	0.10	COMMSCOPE:	30.19	0.88
COMCAST SPCL:	17.39	0.09	CONCURRENT:	5.69	0.06
GCI:	6.09	0.01	CONVERGYS:	12.18	0.24
KNOLOGY:	13.19	0.41	CSG SYSTEMS:	22.46	0.61
LIBERTY CAPITAL:	42.32	1.05	ECHOSTAR:	20.50	(0.06)
LIBERTY GLOBAL:	25.89	0.80	GOOGLE:	505.39	(3.66)
LIBERTY INT:	13.97	0.38	HARMONIC:	5.78	0.24
MEDIACOM:	5.89	0.23	INTEL:	23.09	0.81
RCN:	14.57	0.07	JDSU:	12.73	0.79
SHAW COMM:	19.06	0.22	LEVEL 3:	1.34	0.09
TIME WARNER CABLE:	51.16	1.11	MICROSOFT:	29.44	0.56
VIRGIN MEDIA:	17.11	0.28	MOTOROLA:	6.98	(0.01)
WASH POST:	514.68	16.55	PHILIPS:	32.90	0.96
PROGRAMMING					
CBS:	15.43	0.34	RENTRAK:	25.64	1.18
CROWN:	1.90	0.07	SEACHANGE:	8.95	0.41
DISCOVERY:	38.72	0.57	SONY:	33.24	(0.33)
GRUPO TELEVISA:	19.56	0.58	SPRINT NEXTEL:	4.15	0.02
HSN:	28.06	0.86	THOMAS & BETTS:	41.90	1.67
INTERACTIVE CORP:	22.29	0.59	TIVO:	17.49	0.61
LIBERTY:	35.36	0.44	TOLLGRADE:	6.35	(0.01)
LIBERTY STARZ:	55.29	1.72	UNIVERSAL ELEC:	22.00	0.32
LIONSGATE:	6.91	(0.01)	VONAGE:	1.83	(0.02)
LODGENET:	5.67	0.18	YAHOO:	16.47	0.06
NEW FRONTIER:	1.92	0.00	TELCOS		
OUTDOOR:	6.72	0.38	AT&T:	25.82	0.18
PLAYBOY:	4.50	0.16	QWEST:	5.31	0.15
RHI:	0.26	(0.06)	VERIZON:	28.70	0.30
SCRIPPS INT:	47.97	1.02	MARKET INDICES		
TIME WARNER:	31.54	0.06	DOW:	10896.91	148.65
VALUEVISION:	2.74	0.07	NASDAQ:	2425.02	49.71
VIACOM:	38.33	0.97	TECHNOLOGY		
WWE:	16.42	(0.87)	ADC:	8.21	0.32
TECHNOLOGY					
ADDVANTAGE:	3.20	0.06	ALCATEL LUCENT:	2.76	0.11
AMDOCS:	31.10	0.28	AMPHENOL:	45.44	0.45



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GUEST COLUMNIST

Movies On Demand: The Hits Just Keep On Coming

If the \$30 million multimedia campaign touting Movies on Demand that the CTAM Marketing Co-op organized with major Hollywood studios and cable companies is news to you, it's not a surprise. The "The Video Store Just Moved In" ads target an audience younger than most of the industry veterans attending Spring Connection events this week (myself included). However, while the advertising is designed to drive younger viewers to cable's On Demand platform, I think everyone should be buzzing about it.

Consumers now have more choice when it comes to watching their favorite movies at home, but many don't realize how often the latest top titles are instantly available on cable On Demand. This campaign, which kicked off in March and runs through June, set out to build awareness and improve consumer perception. It began with an unprecedented partnership between the studios and cable companies, which are uniquely able to make watching a movie as easy as clicking a remote.

The timing was perfect. Many traditional brick and mortar video stores are closing and more viewers want affordable and convenient On Demand content for home entertainment. Cable companies are poised to be the primary outlet for delivering Hollywood blockbusters to viewers, many on the same day they are released on DVD (day-and-date).

According to Rentrak, in 2009, eight of the top 10 per-

forming Movies On Demand were released day-and-date, including "Bride Wars," "Gran Torino" and "He's Just Not That Into You." Driven in part by this campaign, several participating studios are building on the trend to make hits available On Demand day-and-date, including "Precious," "The Blind Side" and "Did You Hear about the Morgans?" Moreover, "Pirate Radio" was released On Demand 28 days before the DVD, and some studios recently announced deals with NetFlix and Redbox delaying release of titles until 28 days after the DVD.



Char Beales

The CTAM Co-op led the overall project, Berlin Cameron United created the marketing assets and OMD placed the media. The marketing includes TV spots, program integrations, print ads, digital media, a dedicated Website, Facebook fan page and PR. If you haven't seen the ads yet, you can check it all out at www.cablevideostore.com—and stay apprised of all the great movies coming your way by becoming a Movies On Demand Facebook fan.

The "The Video Store Just Moved In" campaign shows the power of cooperative marketing in cable: together we can have significantly more impact than separately. Furthermore, the cable industry's relationship with the studios has been strengthened by working collaboratively, and we expect Hollywood will continue to bank on cable's Movies On Demand platform as a key distribution outlet for new releases. So, thanks to cable, I know a growing number of viewers will be thrilled that they have a cable video store in their living rooms.

(Char Beales is pres/CEO of CTAM)

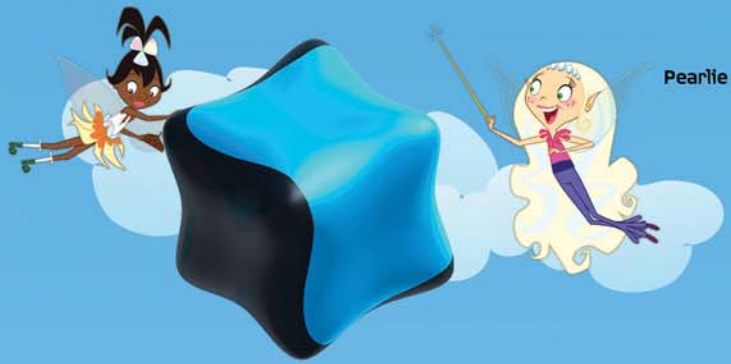
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* Independent Cable News - 12/09 ** Center for Science In The Public Interest Report - 3/10

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Source: Nielsen People Meter Sample, May 2010 UE; Hallmark Movie Channel internal data May '09




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