

CableFAX Daily™

Monday — May 17, 2010

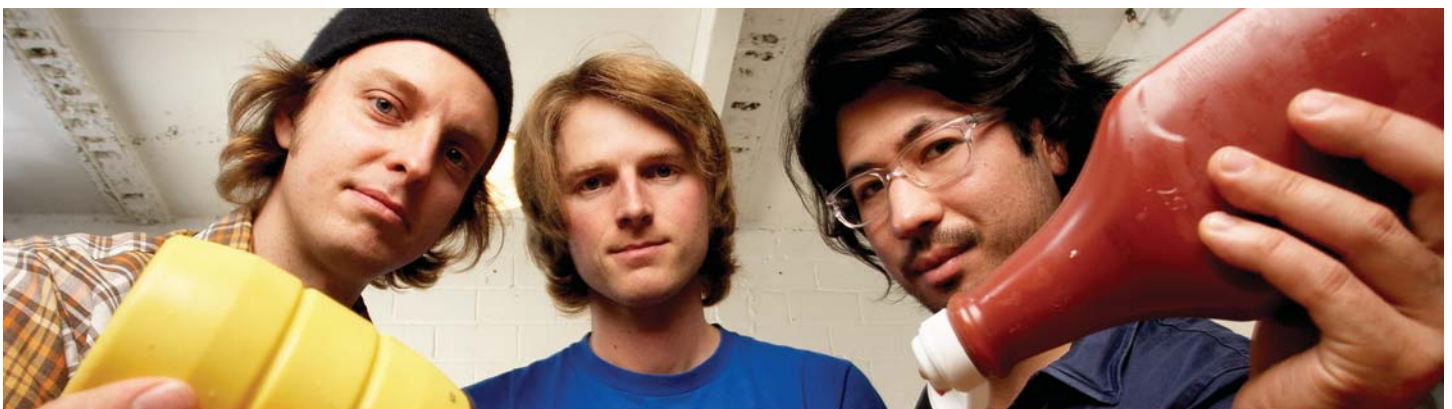
What the Industry Reads First

Volume 21 / No. 094

L.A. Story: Reflections on Cable Show 2010

Do we all love L.A. yet? Then again, did any of us get to see much of it? Yes, it was a whirlwind week of endless sessions, dinners, awards, parties and, of course, networking. Numbers were solid, with attendance at 13K and up slightly from last year's DC event. But the L.A. location also put cable in a different sort of spotlight this year, as the industry tackled convergence in the center of the content creation universe. **Comcast** pres/CEO *Brian Roberts*' surprise video during the Wed session wowed the audience (and apparently the mainstream media) as he turned an already cool iPad into a supremely cool cable remote... on steroids. And talk of "over the top" video finally seemed to evolve fully into more a discussion of opportunities rather than threats. Even seemingly geeky subjects like **CableLabs**' EBIF spec drew standing-room-only crowds anxious to hear how it could supercharge interactive advertising. And 3D remained a topic du jour, with **HDNet**'s *Mark Cuban* personally donning glasses to show off the tech at his booth. Of course, while many praised the **NCTA** for bringing in cable "outsiders" like **Netscape** founder *Marc Andreessen* and **Booyah** CEO *Keith Lee*, some grumbled that moderators didn't engage them much during general sessions. And while an overall show biz feel permeated the convention center, it was a mostly B-list crowd when it came to celebs. Perhaps the industry was too giddy about the improving economy (and stellar Q1 earnings) to bother with celebrity stalking. Or was it just worried about the cloud of new FCC broadband regulations hanging over its recent financial good fortune? Then again, **NCTA** pres/CEO *Kyle McSparrow*'s gentle grilling of **FCC** chmn *Julius Genachowski* over his plan for a "Title II Lite" reclassification (Can't the next chmn just make it "heavy"?) suggested that cable will fight hard to keep its broadband investment train on the rails. With uncertainty surrounding everything from regulations to technology to consumer behavior, it won't be an easy future. But as Comcast's Roberts said during one session, it's just reality. Cope with it. And turn it into an opportunity.

Litigious Swings: The **TiVo-DISH** patent case will not die. As Fri action on **Wall St** tipped which party now has momentum—TiVo shares plummeted 41.6%, DISH's rose 4.3%—a Federal Circuit Court of Appeals Court granted the DBS op's request for an en banc review of previous pro-TiVo decisions including a lower court's upholding in Mar of a contempt ruling that found DISH's DVR design-around violated a court injunction in the case. "Dish



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has been granted another time at bat,” wrote **Sanford Bernstein** analyst *Craig Moffett*, noting how court assent to an en banc review is rare. The expected duration of this new stage in the litigation is unknown. “We believe the issues that will be considered by the full court on rehearing will have a profound impact on innovation in the United States for years to come,” said a clearly pleased DISH in a statement. TiVo said it’s “disappointed that we do not yet have finality in this case despite years of litigation but we remain confident that the Federal Circuit’s ruling in our favor will be reaffirmed after all of the judges on the Federal Circuit have had the opportunity to review the merits of this case.” Looking ahead, **Stifel Nicolas** believes there’s “a significant chance that the Federal Circuit will decide that TiVo needs to pursue its infringement action against the work around in a new trial,” while **Wells Fargo Securities’ Marci Ryvicker** feels the decision “emboldens *Charlie Ergen* to run the legal proceedings to the gamut, until he gets a full victory.”

Retrans: Comments are due Tues on a petition at the **FCC** to overhaul the retrans consent system, but the subject got little lip service at the **Cable Show** in L.A. One interesting thing that did pop up in conversations with FCC staffers is the idea that cable ops and broadcasters work on something to give consumers a better heads up of potential signal drops—the idea being that running a crawl a few days before contract expiration is inadequate. No formal proposals have been put forth to the FCC, but it’ll be interesting to see if there is much talk about it in filings Tues. Here’s one problem with the idea... a lot of operators already do it. Have you taken a gander at the lengthy legal notices **Time Warner Cable** puts out each month? TWC’s notices (like other operators’) often include dozens of networks, including those it has been out of contract with for months but has extensions on, but there are seldom any channel losses. So, do customers need more notification? And if they do, how do you avoid inciting a panic if they see 30 channels listed as possibly going away when in truth most, if not all, will stay?

Carriage: Comcast recently added **RFD-TV** in CO communities such as Golden and Castle Rock, and additional launches are scheduled in the state throughout the summer.

Advertising/Marketing: Time Warner Cable Media Sales agreed to sell regional TV ads on behalf of **FIOS TV** in the NYC, L.A. and Dallas markets. -- **OWN** inked with **Kohl’s** a sponsorship/ad deal covering the net’s original competition series “Your OWN Show: Oprah’s Search for the Next TV Star.” The deal includes a series of co-branded vignettes that will air both within and outside the show, as well as 4 open casting calls to be held in Jun at Kohl’s locations in NYC, Atlanta, Dallas and L.A. -- **NBC** tapped **Microsoft Advertising** to digitally promote its fall programming slate through outlets including **Xbox**, **Windows Mobile** and **Bing**.

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Measurement: The **Coalition for Media Measurement (CIMM)** intro'd the CIMM Set-Top Lexicon, a common set of more than 800 terms for use in analyzing and processing set-top measurement as part of the org's forthcoming pilot projects. The lexicon will also support broader industry innovation and collaboration among end users of set-top data, including TV content providers, media agencies, and advertisers.

Upfronts: **Discovery en Espanol** enters this year's upfront market riding 4 consecutive years of YOY viewership growth among HHs, total viewers, 18-49s, women 18-49 and men 18-49, and touts Hispanic cable nets' 34% increase in prime 18-49 impressions since '06. Highlights of the net's forthcoming schedule include "Reign of the Dinosaurs," a collaboration with **Disney** and **Pixar**; original doc "Narcosubmarinos," which looks at illegal narcotic-smuggling subs from Colombia; and original "Maras the Series," chronicling the rise if Latin American gangs.

Programming: **TBS** greenlit comedy series "Glory Daze," centered on a group of college kids in '80's Wisconsin. -- **TNT** gave the nod to "Franklin & Bash," a buddy law series starring *Mark-Paul Gosselaar*, who led the net's erstwhile legal drama "Raising the Bar." -- **ESPN 3D** will feature this year's **ACC** football championship (Dec). -- **IFC** original "The Increasingly Poor Decisions of Todd Margaret" (Oct 1) spotlights a corporate nobody and pathological liar who unexpectedly finds himself running his company's London office. -- In special series "Black or White: Kids on Race" airing May 17-21, **CNN** anchors *Anderson Cooper* and *Soledad O'Brien* explore children's current views on race, discrimination and stigma.

On the Circuit: **NBCU's** cool Universal Studios party wasn't the only cable event that got rave reviews during the **Cable Show**. The other was a casino benefit Mon night arranged by **Fox Cable** for *Will Flannery*, an avid poker player who passed away suddenly at 38 last fall. The evening raised nearly \$200K for a scholarship fund for his daughters, *Norah* and *Sarah*, with more than 400 people in attendance and 30+ sponsors.

Public Affairs: **Comcast** and **Food Net** are expanding their collaborative efforts to teach kids about food nutrition through plans to create 4 **Good Food Gardens** in 4 different communities next year. The plans follow the pair's Good Food Garden creations in Philly, D.C., Portland and Chicago as part of the MSO's **Comcast Care Day**. -- **Inspiration Nets** and humanitarian partner **Convoy of Hope** have delivered tractor-trailers full of food, drinking water and other supplies to Nashville flood victims. Teams are also taking supplies door-to-door. Make donations at <http://www.convoyofhope.org/go/donate>.

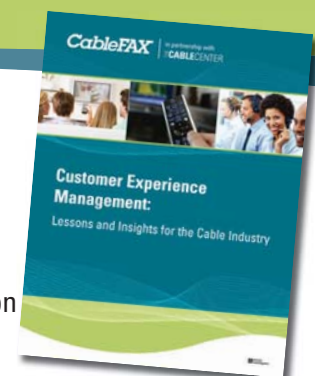
People: **Progress & Freedom Foundation** sr fellow and former **FCC** Media Bureau staffer *Barbara Esbin* will join **Cinnamon Mueller**, heading the firm's DC office. -- **ESPN Int'l** vp, digital media *Tom Gleeson* expanded his role to include oversight of all ESPN digital media efforts outside of the US. -- **MSG Media** named *Peter Tulloch* vp, advanced services.

Business/Finance: The **WV PSC** approved **Frontier's** pending acquisition of **Verizon's** local wireline ops, becoming the final state to sign off on the deal that still requires **FCC** approval. -- Shares of **Hauppauge Digital** rocketed upward by 29.7% after the co said its TV tuner boards for PCs can now stream live TV over the Web to **Apple** mobile devices and any Mac supporting a Safari Web browser.

CableFAX's Customer Experience Management Guidebook

Lessons and Insights for the Cable Industry

CableFAX and The Cable Center collaborated to publish this 150-page guidebook on customer experience management for the cable industry. The guidebook includes case studies, tips and articles on understanding the foundations of customer experience management and gaining insight to use it to improve your business. You also will learn about the latest measurement strategies, research insights, personnel and compensation strategies, social media tactics and communications techniques for implementing customer experience management in your company.



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FLORIDA CABLE FORUM

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CONNECT WITH INDUSTRY LEADERS
AS THEY DISCUSS THE **HOTTEST** TRENDS

SESSIONS:

BREAKFAST: A CONVERSATION WITH...
JACQUELINE HERNÁNDEZ
CHIEF OPERATING OFFICER, TELEMUNDO

A HARD LOOK AT BEST PRACTICES
IN RETAINING CUSTOMERS

MEET THE FLORIDA OPERATORS

CONSENSUS ON REACHING
FUTURE GROWTH

TANGO LESSONS FOR PARTNERS
DRIVING TRANSACTIONAL TELEVISION

LUNCHEON: THE STATE OF
ADVANCED CABLE PRODUCTS

BACK TO THE FUTURE: HIGH PROFILE
TECHNOLOGIES FOR CUSTOMERS

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CableFAX Week in Review

Company	Ticker	5/14 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
BRITISH SKY:	BSY	33.92	0.09%	(6.35%)
DIRECTV:	DTV	37.34	4.04%	11.96%
DISH:	DISH	22.90	7.51%	10.26%
DISNEY:	DIS	34.06	1.95%	5.61%
GE:	GE	17.64	4.50%	16.59%
NEWS CORP:	NWS	16.39	(7.87%)	2.95%

Company	Ticker	5/14 Close	1-Week % Chg	YTD %Chg
MSOS				
CABLEVISION:	CVC	24.39	(1.01%)	(5.54%)
COMCAST:	CMCSA	17.60	(4.14%)	4.39%
COMCAST SPCL:	CMCSK	16.88	(3.43%)	5.43%
GCI:	GNCMA	6.14	4.42%	(3.76%)
KNOLOGY:	KNOL	12.99	5.61%	18.96%
LIBERTY CAPITAL:	LCAPA	41.43	7.47%	73.49%
LIBERTY GLOBAL:	LBTYA	25.50	5.99%	16.49%
LIBERTY INT:	LINTA	13.10	(5.55%)	20.85%
MEDIACOM:	MCCC	5.54	5.12%	23.94%
RCN:	RCNI	14.40	0.21%	32.72%
SHAW COMM:	SJR	18.57	2.48%	(9.72%)
TIME WARNER CABLE:	TWC	51.60	4.31%	24.67%
VIRGIN MEDIA:	VMED	16.15	3.00%	(4.04%)
WASH POST:	WPO	501.12	5.16%	13.99%

Company	Ticker	5/14 Close	1-Week % Chg	YTD %Chg
PROGRAMMING				
CBS:	CBS	14.67	3.24%	4.41%
CROWN:	CRWN	1.88	4.44%	29.66%
DISCOVERY:	DISCA	37.49	6.35%	22.24%
GRUPO TELEVISIA:	TV	19.05	4.50%	(8.24%)
HSN:	HSNI	26.44	(0.04%)	30.96%
INTERACTIVE CORP:	IACI	22.59	9.61%	10.30%
LIBERTY:	L	34.10	1.49%	(6.19%)
LIBERTY STARZ:	LSTZA	55.15	6.88%	19.50%
LIONSGATE:	LGF	6.70	2.13%	15.32%
LODGENET:	LNET	5.44	5.84%	(1.63%)
NEW FRONTIER:	NOOF	1.88	(4.08%)	(0.53%)
OUTDOOR:	OUTD	6.50	8.33%	12.07%
PLAYBOY:	PLA	4.25	10.10%	32.81%
RHI:	RHIE	0.22	(4.35%)	(29.03%)
SCRIPPS INT:	SNI	46.33	5.08%	11.64%
TIME WARNER:	TWX	30.56	1.02%	4.87%
VALUEVISION:	VTV	2.61	3.57%	(45.63%)
VIACOM:	VIA	37.55	4.57%	19.21%
WWE:	WWE	16.78	2.25%	9.46%

Company	Ticker	5/14 Close	1-Week % Chg	YTD %Chg
TECHNOLOGY				
ADC:	ADCT	7.75	1.71%	24.80%
ADVANTAGE:	AEY	3.00	15.38%	52.28%
ALCATEL LUCENT:	ALU	2.54	0.79%	(23.49%)
AMDOCS:	DOX	30.62	2.72%	7.33%
AMPHENOL:	APH	44.00	3.60%	(4.72%)
AOL:	AOL	23.79	9.33%	2.19%
APPLE:	AAPL	253.82	7.61%	20.45%
ARRIS GROUP:	ARRS	11.67	1.48%	2.10%
AVID TECH:	AVID	14.72	6.82%	15.36%
BIGBAND:	BBND	2.85	1.42%	(17.15%)
BLNDER TONGUE:	BDR	1.33	27.88%	16.67%
BROADCOM:	BRCM	32.29	0.94%	2.61%

Company	Ticker	5/14 Close	1-Week % Chg	YTD %Chg
CISCO:	CSCO	24.94	0.93%	4.18%
CLEARWIRE:	CLWR	8.13	6.55%	20.27%
COMMSCOPE:	CTV	28.86	3.55%	8.78%
CONCURRENT:	CCUR	5.56	(1.07%)	40.40%
CONVERGYS:	CVG	11.65	(0.26%)	8.37%
CSG SYSTEMS:	CSGS	22.39	4.92%	17.29%
ECHOSTAR:	SATS	20.45	13.30%	1.54%
GOOGLE:	GOOG	507.53	2.92%	(18.14%)
HARMONIC:	HLIT	5.73	5.72%	(9.34%)
INTEL:	INTC	21.89	2.72%	7.30%
JDSU:	JDSU	11.83	13.21%	43.39%
LEVEL 3:	LVL	1.25	1.63%	(18.3%)
MICROSOFT:	MSFT	28.93	2.55%	(5.09%)
MOTOROLA:	MOT	6.79	2.88%	(12.5%)
PHILIPS:	PHG	30.99	6.68%	5.26%
RENTRAK:	RENT	24.96	10.79%	41.26%
SEACHANGE:	SEAC	8.60	10.26%	31.10%
SONY:	SNE	31.19	(5.2%)	7.55%
SPRINT NEXTEL:	S	4.36	13.54%	19.13%
THOMAS & BETTS:	TNB	40.44	4.04%	12.99%
TIVO:	TIVO	10.16	(34.91%)	(0.2%)
TOLLGRADE:	TLGD	6.90	8.49%	12.93%
UNIVERSAL ELEC:	UEIC	21.92	7.29%	(5.6%)
VONAGE:	VG	1.98	16.47%	41.43%
YAHOO:	YHOO	16.39	7.19%	(2.32%)

Company	Ticker	5/14 Close	1-Week % Chg	YTD %Chg
TELCOS				
AT&T:	T	25.40	(2.53%)	(9.38%)
QWEST:	Q	5.28	3.94%	25.42%
VERIZON:	VZ	28.51	1.14%	(13.95%)

Index	5/14 Close	1-Week % Chg	YTD %Chg	
MARKET INDICES				
DOW:	DJI	10620.16	2.31%	1.84%
NASDAQ:	IXIC	2346.85	3.58%	3.42%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. BLNDER TONGUE:	1.33	27.88%
2. VONAGE:	1.98	16.47%
3. ADVANTAGE:	3.00	15.38%
4. SPRINT NEXTEL:	4.36	13.54%
5. ECHOSTAR:	20.45	13.30%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. TIVO:	10.16	(34.91%)
2. NEWS CORP:	16.39	(7.87%)
3. LIBERTY INT:	13.10	(5.55%)
4. SONY:	31.19	(5.2%)
5. RHI:	0.22	(4.35%)

CableFAX PROGRAM AWARDS

Sponsorship Opportunities: Debbie Vodenos at 301.354.1695 or dvodenos@accessintel.com
Entry Questions: Kate Schaeffer at 301.354.2303 or kschaeffer@accessintel.com

From the most outstanding cable programs to the best surprise ending, the annual CableFAX Program Awards to honor the best in cable programming content and people. This unique awards program from the industry's most trusted brand, CableFAX, raises the bar on what's good on and about cable. Now's your chance to win a CableFAX Program Award and get recognized for bringing value to your viewers.

It's simple to compete, as your content and people speak for themselves. But you have to enter to be considered, so don't let your competitors steal the show. We'll be honoring the winners and honorable mentions in October at the Grand Hyatt Hotel in NYC and in the annual CableFAX Program Awards Issue.

