20 Pages Today

CableFAX Daily

Monday — May 19, 2008

What the Industry Reads First

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Cable Show: Project Canoe, WiMax Highlight General Session

Ears perked up during Sun's Cable Show opening session when Comcast CEO Brian Roberts indicated that cable has "just hired or is about to hire" a CEO for Project Canoe, the industry effort to standardize interactive ad technology in cable systems throughout the country. Targeting advertising is the "holy grail" for cable, he said. Pressed about the issue later by reporters, Roberts said he didn't have an answer today on a timeframe for the venture. "The first most important thing is to hire a leader and fill in with the execution plan. It's been a high priority, and we're nearing the end of that process," the Comcast chief said. "I may be a little ahead of myself, but so what. I think it's an important exciting step." Last month, Ad Age reported that outgoing Aegis Media Americas CEO David Verklin is expected to lead Project Canoe. Should be interesting since Verklin is slated to speak at Tues' general advertising session. Another new venture that took center stage during Sun's session was the WiMax iv led by Sprint and Clearwire (Comcast, Time Warner Cable and Bright House are investors). Paul Otellini, pres/CEO of Intel (also an investor in the jv), said it will probably be the fastest, nationwide network built first. "This country will finally move from sort of 3rd World position in wireless communications to lead the world," he said. Otellini expects the network to consistently be above 5Mbps and able to reach 14-15Mbps in some areas. The difference between the WiFi jv and cable's **Pivot** jv with Sprint is that this is not a "me too product," Roberts said. Pivot "was if we needed a quadruple play product... Sprint would say you can have my phone and call it something different... We've not needed a quadruple play, so we don't feel we were harmed by it not being successful," Roberts said. The WiMax jv is a different proposition. "It's not a 5 or 10 year deal. It's forever," he said. "It's a founder's relationship that is permanent, and it's wholesale, meaning we can go to our customers with our billing, our marketing, our package. We design the products." In a later panel Sun, Jim Patterson, Sprint Nextel's pres, wholesale services, said the new Clearwire relationship has "a lot more flexibility and freedom about how you go to market" compared to Pivot. Programmers talked up how the new Wi-Fi network will open up new distribution opportunities for them. "We're a pure play content company so we love all the new forms of distribution because it provides more ways for us to interact with our audiences," said **Viacom** pres/CEO *Philippe Dauman*. Some may have been surprised that neither Dauman nor News Corp pres/COO Peter Chernin seemed overly concerned about digital rights management in the age of new media. Nor were they sweating the fragmentation it brings. "To the degree we're trying to protect our existing businesses, we're toast," Chernin said, pointing to the music industry as a prime example. "We better build new businesses and new business models faster than the old ones may erode."

<u>Campaign '08</u>: Former FCC heads and current advisers for *Hillary Clinton*, *Barack Obama* and *John McCain*'s presidential campaigns told the Cable Show's Public Policy lunch Sun how their candidates come down on the issue of a



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la carte. Clinton "would not go there," said former FCC commish *Susan Ness*, reciting cable's list of arguments against mandated a la carte. While Obama supporter *Bill Kennard* concluded during his tenure as FCC chmn that a la carte didn't make sense, he said Obama does not have a position on the issue. Former FCC chmn *Michael Powell*, who is advising McCain, stressed that while the Senator has spoken up for a la carte, he has "never supported an outright mandatory legislative requirement." "He has expressed support for the concept if it lowered prices and provided choice," Powell said. "But he himself understands the limitations of govt attempting to determine the business models of a particular company." Not surprisingly, Powell painted McCain as the most deregulatory candidate with him "very skeptical" of the need to intervene with net neutrality rules. Obama is a "strong and consistent supporter" of net neutrality, who supports a tiered pricing system as long as it's not discriminatory, Kennard said. Clinton supports the basic principles, while recognizing that network mgmt should not be "unnecessarily constrained," Ness said.

The Big Switch: TiVo and several manufacturers of switched digital external tuning adapters have submitted products for interoperability testing at CableLabs. The news is significant because the tuning adapter will enable TiVo Series3 and TiVo HD DVRs, as well as certain 1-way digital cable ready devices that use CableCARDs, to access digital cable channels using switched digital. NCTA has been working with TiVo and CE companies to find a way that switched digital will work with their products. Motorola and Cisco have both developed external turning adaptors and are seeking CableLabs qualification. The tuning adapters are expected to be offered in the coming months by cable operators including Comcast, Time Warner, Cox, and Cablevision in areas where switched digital technology is being deployed. The cable operators and TiVo plan to work cooperatively to alert TiVo subscribers about the availability or need of the new external adapter and to ensure that installation of the adapter and CableCARDs will be easy and seamless for the consumer.

Landgraf Landing: A new multi-year agreement will keep *John Landgraf* as **FX Networks** pres/gm, a role he has held since May '05. The deal, announced Mon, keeps him in charge of the entertainment and business operations of FX, the recently introduced **FX HD**; **Fox Movie Channel** and also **FX Productions**. He will continue to operate out of **Fox Network Group** headquarters in L.A. and report to Fox Network Group pres CEO *Tony Vinciquerra*. During Landgraf's tenure, FX has achieved all-time highs in total viewers and 18-49s.

Show Notebook: Cox svp, strategy and development *Dallas Clement* on Sun shed a bit more light on why Cox chose to participate in the recent 700-MHz auction, noting that the spectrum requires only one cell site for every 4 sites using AWS spectrum or every 9 sites using BRS technology. "The economics are more attractive," he said. -- **Comcast** has been in the business services game for 18 months and has concluded the urban myth that the RBOCS have underserved small and medium-size businesses is correct, Comcast Midwest pres *Bill Connors* told a business services panel. "We're selling [into that sector] much quicker than anyone at our company thought," he added. **Cox Hampton Roads** chief *Gary McCollum* agreed, noting "a huge opportunity... a \$5 billion pie," mostly in areas "where we already pass." Beyond voice and data, businesses offer opportunity in video, and the enterprise sector is "a three-point shot... but you need the right resources in place," McCollum said. Extending McCollum's basketball analogy, **SNL Kagan**'s *lan Olgeirson* said cable's focus on small businesses is "a slam dunk," but he's curious to see how quickly cable moves to 10-foot jump shots, the more demanding medium-size businesses. -- The best line from Sunday's Green panel came from Cox's *John Spalding*, who noted Cox chief *Jim Kennedy*'s



long-standing commitment to the environment. "For years we've done things that have had a slight impact, we call them light green. We've also done things that have had a deep impact, we call them dark green. And like Comcast, we have waterless urinals. We call them pee green."

<u>Carriage</u>: Programmers had several Comcast announcements to make at the **Cable Show**. The largest US MSO inked a carriage deal for high-def movie channel **MGM HD** that includes VOD. Additionally, Comcast will launch **RFD-TV** on systems in parts of CA, AZ, NM, KY, WV, IL and TN by June 15. The MSO launched RFD in Nashville back in Mar. **BlueHighways TV** also announced a multi-year agreement with the MSO for linear and VOD services. -- **Bresnan** will begin launching **ION**'s digital nets **qubo** and **ION Life** in some of its systems. **Buckeye** also recently announced a company-wide launch of qubo and ION Life.

Research: TV remains the preferred medium among consumers, **CAB**'s "Multi-Media Study" found. Consumers report TV ads cue them to visit brand Websites as much as 2:1 over newspaper and radio advertising, said the study, conducted by **Scarborough Research**. 26% of those respondents who received a brand ad on television stated they sought out more information on the brand Website within the past 30 days.

5Qs with Lynn Yaeger: Less than 6 months after her retirement from Time Warner Cable as evp, corp affairs, Yaeger has signed on as independent sr counsel for Retirement Living TV. We caught up with the veteran public affairs exec to ask her why. Just because the network's called Retirement Living, it doesn't mean that working for them counts as retirement. We thought you were going take it easy for a while. What happened? I have been taking it easy. I've been doing some of the things you never get a chance to do and taking a deep breath. But I enjoy keeping my hand in the industry a little bit. This opportunity intrigued me... and it keeps me active. RLTV faces some real challenges as a start-up. What will your role be? Everyone has challenges. I think one of the advantages for RLTV right now is their concept. With so many people on the verge of retiring, and knowing that their programming appeals to that whole group directly, there's nothing really representative of that on TV today. I hope I can help them get to know the cable industry a little better—figure out how to best to utilize the power of their programming and their existing relationships to further their brand. How will your time at an MSO help you there? I think I know what operators are looking for. Where I really hope to help RLTV is in the area of govt relations and public affairs. One area where they are extremely well positioned... is to reach and educate the senior demographic about the DTV transition. There are some things that RLTV is in a real unique position to help cable operators and the entire industry with. Given your political background, are you following the elections closely? I'm glued to the TV like everyone else. I'm a political junkie still. Have you ever considered running for office? I did at one point early on in my career. I realized back then I like to be high up behind the scenes, not the one kissing the babies. At the same time, I have flirted with maybe doing something in the public arena and maybe that opportunity will come some day.

<u>Show Doings:</u> CTAM will conduct its live media tour from the **Cable Show** floor once again this year. Tech guru *David Gregg* will serve as spokesman, conducting interviews with TV and radio stations across the country Tues. As of Fri morning, 18 interviews had been scheduled with stations in Tampa, Denver, NYC and other areas.

Floor Events: The Kardashian sisters and mom Kris Jenner from **E!**'s "Keeping Up with the Kardashians" will appear Mon (10am) at **Comcast**'s booth. -- Stop by **ION Media**'s booth on Sun, Mon and Tues for a pin-of-the-day. If you're spotted wearing it on the show floor, you could receive a \$100 gift card and entry into ION's grand prize \$1K gift card drawing at the end of the show. -- The **Disney/ESPN Nets** affil sales and marketing booth is offering visitors a chance Mon (10am-4pm) to win a *Larry Bird*-autographed IN State basketball jersey. -- Catch *Anderson Cooper* at **Turner**'s booth Mon morning (10-11am). -- Among the celebs set to appear Mon at **Fox Cable Nets**'



booth: Glenn Close (2:30-4pm) and Dick Butkus (11:30am-1pm). -- Rainbow Media will toast Mon (2:30-4pm) the success of AMC series "Mad Men" with cocktails, hors d'oeuvres and (candy) cigarettes served by waiters and waitresses in '60s garb. -- Outdoor Channel will donate \$25 to Animal Rescue of New Orleans for each person who plays video games Bass Simulator and Big Buck Hunter at its booth. -- That zany purple dinosaur Barney will perform live between 11:45am-1:30pm Mon at Sprout's booth.

<u>In the States</u>: Comcast has signed a purchase agreement for Arris' DOCSIS 3.0 CMTS. -- Weather Channel purchased renewable energy credits through Renewable Choice Energy to offset 35% of the electricity usage in its new HD studio over the next 2 years. -- SES Americom plans to add QVC HD to its HD-Prime delivery platform.

<u>VOD</u>: Comcast in July will become the 1st MSO to distribute **Fuse**'s HD VOD service that will feature original series, interviews and music videos. -- **Suddenlink has** tapped **TVN** to provide on demand content including studio films (SD and HD), broadcast/cable net programming and premium SVOD offerings.

<u>Competition</u>: DirecTV is teaming with Tennis Channel and ESPN2 to devote 6 channels to live French Open tournament play, May 25-June 1. Fans will be able to view up to 6 matches simultaneously.

Technology: Ensequence is developing a new EBIF version of **HSN**'s live interactive shopping service, "Shop by Remote" that will allow the net to garner broader distribution for the app. The iTV service is already in 15mln homes. -- **Pace** introduced a new family of next-gen MPEG-4 advanced video compression set-tops that will be available for deployment later this year. They are MPEG-2 and MPEG-4 capable and support tru2way. -- **Advanced Digital Broadcast** showed off its fully tru2way certified STB, the "ADB-4820C." It's specifically designed to operate with new flat panel TVs and has a space saving design that lets it mount to the back of a set.

<u>Advertising/Marketing:</u> Turner Network Sales and Cox have partnered for a co-branded marketing campaign designed to encourage digital upgrades by promoting HD and VOD services throughout the summer. The campaign features direct mail highlighting Turner content such as TNT's "The Closer" and TBS' "House of Payne" in 14 Cox systems and integrated cross channel spots promoting Cox's HD tier alongside the 2 shows as well as CNN's "Black in America."

Online: Voom HD Nets is launching MovieMapping.com, which gives film buffs exact locations across the US where legendary movies have been filmed. Powered by Google Maps, the site will help promote Voom's movie channels, Film Fest HD, Voom HD Movies and Monsters HD. -- WWE launches new kids portal WWEKids. com next month as part of its effort to expand its base of younger fans. The site follows the Apr launch of WWE Kids magazine. -- Turn yourself into a "Bridezilla." To promote season 5 of the WE series, www.WEtv.com is letting visitors create their own personal videos of themselves acting liked outrageous brides-to-be. -- Disney and ESPN Media Nets announced a new Website for affils, www.affiliate.disney.espn.com, that offers downloadable monthly cross channel spots and a comprehensive programming grid.

<u>Floor Color:</u> The traffic seemed a bit subdued Sunday, but you can't blame the marching jazz band that brought showgoers onto the floor. That trumpet player was terrific. You also had to love seeing **Turner** booth personnel tossing attendees peanuts and beer (yes, we said beer) to tout its baseball coverage. And wasn't **RFD TV**'s mechanical bull manned by some excellent-looking ranch hands, in skintight chaps and boots. More booth ladies were present at **The Sportsman Channel**'s venue, as a pair of beauties herded folks in to play Fish and Chips. High tech was **Weather Channel**'s Weather Wall, which let folks broadcast their own weather report with visuals in the background and then have it downloaded to the Internet. On the slower side, **BlueHighways TV** had its picket fence, lemonade and founder *Stan Hitch-cock* serenading on guitar. Perhaps the best floor sight was *Ralph Roberts* walking the boards, and looking great.





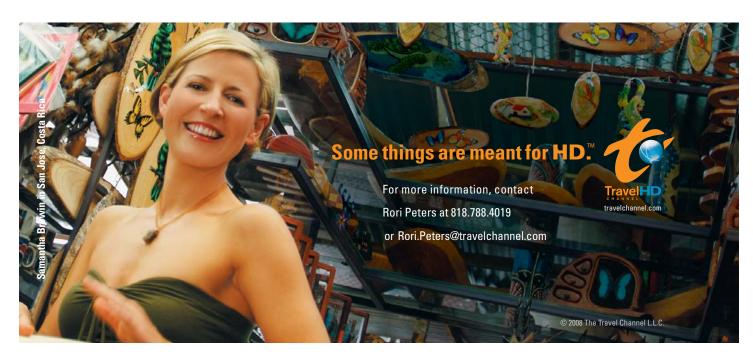
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Programming: Gospel Music Channel will bow new original, "Bobby Jones: Next Generation," June 1, 8pm ET. The hour-long series will focus on emerging artists. "Bobby Jones Gospel" has been on BET since '80. -- WE is teaming with Cable in the Classroom and New Line Television to make its popular "High School Confidential" series available on DVD to high schools and educators nationwide. To kick off the initiative, 200 DVDs will be donated to 20 New Orleans high schools during the Cable Show. -- Lifetime Movie Net's summer schedule will include "The Secrets of the Summer House" (Jun 1), featuring a woman's battle against a centuries-old curse, and "Little Girl Lost: The Delimar Vera Story" (Aug 17), a true-life story about an infant believed to have perished in an apartment fire only to surface 6 years later. -- ION Life bows "Stories of the NFL," a commissioned prod from NFL Films, Jun 2 and "The 50 Greatest Moments at Madison Square Garden" Jun 15. -- The Ski Channel acquired the rights to 5 years worth of international "Skiers World" episodes as well as Level 1 Prod's library of classic ski films. -- Science Channel's 2nd annual Space Week (Jul 6-11, 9-11pm) includes 6-part series "Moon Machines" and interactive features at ScienceChannel.com. -- "Living with Ed," chronicling Ed Begley's eco-friendly lifestyle, will jump from HGTV to Planet Green when the latter net debuts Jun 4.

<u>Public Affairs</u>: Rainbow pres/CEO *Josh Sapan* is making additional donations of his "discarded art" collection to local AIDS organizations throughout the US that are affiliated with **Cable Positive**'s regional chapters. The art, which Sapan rescues from sidewalks, yard sales, etc, has raised thousands of dollars through online auctions for Cable Positive's initiatives. Sapan kicked off the expanded partnership Sun with a 35-piece art donation to New Orleans-based AIDS organization **Project Lazarus** and **Kent House**. -- **Discovery Education**, **Science Channel** and **Comcast** have named the **Sutter Science Club** from CA's Sutter Middle School the grand prize winner of the inaugural Science Matters! Contest, part of an affil marketing initiative created to excite students about why science matters and its relevance to daily life. The club's video concept will be produced by Science Channel and aired nationally as a PSA from Jul 6-11. -- **Gol TV** has produced and will air a PSA to raise awareness of the **US Soccer Foundation**'s Pass-back Program, which provides new and gently used soccer equipment to children in need across the globe.

People: Laura Lee was promoted to vp, network distribution and service, Hallmark and Hallmark Movie Channel. -- AdGorilla tapped former Lifetime exec Carla Cortis as evp, corporate strategy. -- Univision hired former Oxygen exec Daniel Taitz as svp, biz affairs for the affil relations team. The company also promoted Deanna Andaverde and Tim Spillane to svps, and Gretchen Barnes and Jason Eanes to vps. It also promoted John Kozak to vp, network sales. -- Broadband voice/data provider Iptimize named Inspiration Nets' Jim Dickson as vp, cable sales. The company also added 3 board members: Cfax columnist/Media Business Corp CEO Paul Maxwell, Secure Signals CEO Stanley McGinnis and McGraw and McGraw CPA pres Robert McGraw. -- We'll miss working with GSN pr chief Cindy Ronzoni, who we hear has left the network. And we know we aren't alone. When the PR folks at TCA's press tour are announced, none of the crusty critics ever applaud—except when Ronzoni's name is called. Best of luck. -- Bresnan tapped Jeanne Rudell as svp, human resources. -- MSG Media appointed Art Ventura svp, ad sales. -- David DeSocio was named svp, partnerships, Lifetime Nets.



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CableFAX Week in Review

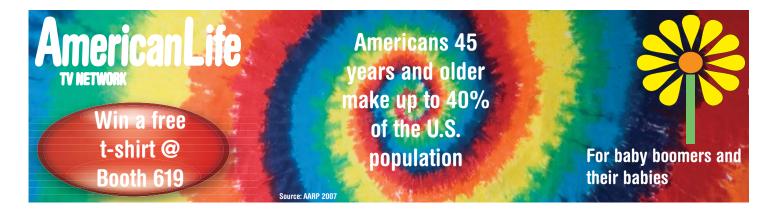
Company	Ticker	5/16	1-Week	YTD
		Close	% Chg	%Chg
BROADCASTERS/DBS/M		44.42	0.600/	(11.00()
BRITISH SKY:				
DIRECTV:				
DISNEY:				
ECHOSTAR:				
GE:			, ,	, ,
HEARST-ARGYLE:				
ION MEDIA:				
NEWS CORP:	NWS	19.99	3.30%	(5.1%)
MSOS				
CABLEVISION:				
CHARTER:				
COMCAST:				
COMCAST SPCL:				
GCI:	GNCMA	6.90	10.80%	(21.1%)
KNOLOGY:	KNOL	15.24	14.60%	19.20%
LIBERTY CAPITAL:	LCAPA	15.29	0.30%	(34.4%)
LIBERTY ENT:	LMDIA	26.76	2.70%	10.70%
LIBERTY GLOBAL:	LBTYA	35.40	1.50%	(9.7%)
LIBERTY INTERACTIVE:	LINTA	16.72	3.80%	(12.4%)
MEDIACOM:	MCCC	5.58	11.60%	21.60%
SHAW COMM:	SJR	21.92	1.00%	(3.9%)
TIME WARNER CABLE:				
VIRGIN MEDIA:				
WASH POST:				
Programming CBS: Crown:				
DISCOVERY:				
EW SCRIPPS:				
GRUPO TELEVISA:				
INTERACTIVE CORP:				
LODGENET:				
NEW FRONTIER:				
OUTDOOR:				
PLAYBOY:				
TIME WARNER:				
VALUEVISION:				
VIACOM:				
WWE:	WWE	16.37	1.70%	19.00%
TECHNOLOGY				
3COM:				
ADC:	ADCT	15.34	2.60%	(1.4%)
ADDVANTAGE:	AEY	3.60	(10.9%)	(41.7%)
ALCATEL LUCENT:	ALU	7.59	9.10%	3.70%
AMDOCS:	DOX	31.75	0.30%	(7.9%)
AMPHENOL:	APH	47.40	2.40%	2.40%
APPLE:	AAPL	187.62	2.30%	(5.3%)
ARRIS GROUP:				
AVID TECH:				. ,
BIGBAND:				
BLNDER TONGUE:				
BROADCOM:				
C-COR:				
CISCO:				
CIJCU		∠0.⊃		(∠.170)

Company	Ticker	5/16	1-Week	YTD
		Close	% Chg	%Chg
COMMSCOPE:	CTV	52.65	3.20%	7.00%
CONCURRENT:				
CONVERGYS:	CVG	16.10	4.80%	(2.2%)
CSG SYSTEMS:	CSGS	12.81	3.20%	(13%)
ECHOSTAR HOLDING:	SATS	33.75	10.30%	2.60%
GEMSTAR TVG:	GMST	4.41		(7.4%)
GOOGLE:	GOOG	580.07	1.20%	(16.1%)
HARMONIC:	HLIT	8.54	8.10%	(18.5%)
JDSU:	JDSU	11.80	5.00%	(10.8%)
LEVEL 3:	LVLT	3.55	13.80%	16.80%
MICROSOFT:	MSFT	29.99	2.00%	(14.8%)
MOTOROLA:	TOM	10.07	3.20%	(35.3%)
NDS:	NNDS	54.18	5.60%	(8.5%)
NORTEL:				
OPENTV:	OPTV	1.51		14.40%
PHILIPS:	PHG	38.87	3.20%	(1.9%)
RENTRAK:	RENT	13.75	(0.5%)	(4.7%)
SEACHANGE:	SEAC	7.39	2.60%	2.20%
SONY:	SNE	49.50	10.60%	(8.8%)
SPRINT NEXTEL:	S	9.17	(2.2%)	(30.2%)
THOMAS & BETTS:	TNB	41.89	14.70%	(14.6%)
TIVO:	TIVO	8.81	9.30%	5.60%
TOLLGRADE:	TLGD	4.56	3.60%	(43.1%)
UNIVERSAL ELEC:	UEIC	23.98	6.20%	(28.3%)
VONAGE:	VG	1.83		(20.4%)
WORLDGATE:	WGAT	0.30		
YAHOO:	YHOO	27.66	6.70%	18.90%
TELCOS				
AT&T:	Т	40.07	3.80%	2.20%
QWEST:				
VERIZON:				
MARKET INDICES				
DOW:	INDU	12986.80	1.90%	(2.1%)
NASDAQ:				

WINNERS & LOSERS

THIS WEEK'S STUCK PRICE WINNERS		
COMPANY	CLOSE	1-WK CH
1. LODGENET:	6.34	17.60%
2. THOMAS & BETTS:	41.89	14.70%
3. KNOLOGY:	15.24	14.60%
4. LEVEL 3:	3.55	13.80%
5. CROWN:	5.04	12.00%

THIS MEEK'S STUCK PRICE LUSERS		
COMPANY	CLOSE	1-WK CH
1. BLNDER TONGUE:	1.20	(20%)
2. PLAYBOY:	5.98	(17.6%)
3. VALUEVISION:	4.39	(12.4%)
4. ADDVANTAGE:	3.60	(10.9%)
5. NEW FRONTIER:	4.92	(6.5%)



MaxFAX...

"Come on Everybody...

...take a trip with me,

"Down the Mississippi down to New Orleans.

"The honeysuckle's bloomin' on the honeysuckle vine



Paul S. Maxwell

"And love is bloomin' there all of the time.

"Every Southern belle is a Mississippi queen,

"Down the Mississippi down in New Orleans."

Meanwhile, I think we'll just keep dancin' "til a quarter to three."

Welcome back to New Orleans... and have a fabulous show. Wasn't it nice to see all of those subscriber additions last quarter... and lack of growth in some competitors? Smile this week. Hit the show floor. Place a whole bunch of orders! Then do it again.

[Can't help it with the lyrics in the latest columns... getting ready for Tuesday night's Battle of the Bands and preparing to bid on a guitar or four. Vote for the TV Rejects—who should've been called "The Remainders."]

Random Notes:

• (E)Merging Comments: Suppose DISH should merge with Nextel so they challenge one another on sub-

scriber losses? Then Sprint could merge into the Clearwire/Cable Consortium and do it right? And, now that Cablevision will own Newsday... just be glad they didn't buy the Chicago Cubs instead. (Analyst consensus about that acquisition is just wrong—in my not so humble opinion. Great move by Cablevision—takes stickiness, not to mention geographic market dominance, to a new level). It is sad to see *Tribune* dissolving. The death-watch of local big city newspapers is disturbing... but inevitable given societal and technological changes. On the other hand, I'll bet the hyper-localism of News 12 + Newsday will work.

- Other Mergers? So, what might make sense? Maybe merge the Federal Confusion Commission with the Federal Election Commission and move it to Florida (just in case)? Or maybe the National Association of Over-the-Airheads with the Satellite Broadcasting & Communications Association and the... ah, forget it. Bad idea. And, realistically, there might not be any more mergers approved by the FCC anyway... look how long they take to tie their shoes, much less approve or deny the DARS (XM + Sirius = Static?) deal!
- Tooting Own Horn Department of Shameless Promotion, Part XLIV: Come see us (that is, MBC) at booth #738 and check out the new cable-specific additions to http://www.whereished.com—featuring

- cable HD VOD offerings for consumers looking for Hi-Def programming availabilities in their home ZIP codes. We've also got some interesting (much less costly and better allocation methodologies) developments in our Media Census '08 group of database products.
- "Sort of Free Wi-Fi": Might learn something from Philadelphia's abortive Wi-Fi deal with Earthlink. Like don't believe in promises that can't be kept. Don't believe even if you've a reason to believe (you know, hope against hope). For the record, David Cohen and company were right on.
- The Cable Hole Card? It's coming... albeit slowly. But getting every set-top box to "behave" the same way will be the biggest game changer these industries have seen since DTH launched. The satellite national footprint has allowed an unbalanced competitive landscape to flourish. When cable can provide a national behavioral footprint... well, watch out... here comes true iTV. And it is really, truly coming. Don't hold your breath... but keep watching closely. There are even some nascent steps being taken on the show floor this week.

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GUEST COLUMNIST

Ray Nagin

Mayor, New Orleans

Welcome Back to New Orleans

I am pleased to welcome Cable Show '08 to New Orleans. Thank you for your commitment to the rebuilding of our city. I know that you had to move your 2006 conference from our city, but I believe that you will see during your visit that we are making great strides forward. We are recovering, and New Orleans remains a great place to visit, live and conduct business.

As you may be aware, I have a special connection to cable. As a former vice president and general manager at Cox Communications, I truly understand the role and impact of your business. As the NCTA brings an estimated 14,000 people to our city for days of networking, collaboration and learning, we hope that you will take some time to see for yourselves

the rebuilding that is underway and the challenges that remain.

You could not have chosen a better time to visit. During my budget address to the City Council last fall, I said that 2008 would be the tipping point in our recovery. That has held true as we have hosted a series of large, high-profile events, including the Sugar Bowl, the BCS Championship, the NBA All-Star Championship Game, V to the 10th, and the North American Leaders Summit, as well as Mardi Gras, French Quarter Fest and Jazz Fest. You are now part of a landmark year in our city.

Builders, contractors, engineers and other technical professionals are the obvious beneficiaries now that we are undertaking a historic rebuilding, but none can function without the other components that allow cities to operate and businesses to function. And in every case, telecommunications professionals are essential to effective communications, useful technology and innovative business approaches.

New Orleans is entering a long-term rebuilding phase. Within City government alone, we have begun more than

\$1 billion in construction projects. Other governmental entities, such as the Orleans Parish Schools, businesses and individual homeowners are repairing their properties and rebuilding their lives.

This is happening as our residents return home. Because our recovery is about the people, we can measure our success – at least in part – by the number who live here.

Less than three years after the worst natural and manmade disaster in our country's history, our population is 70.8 percent of pre-Katrina, according to the Greater New Orleans Community Data Center. That means that about 323,000 people now live in this city. That is astounding, considering the predictions that we would never return.

We have gotten to this point as a result of wise decision making. Hurricane Katrina shut down

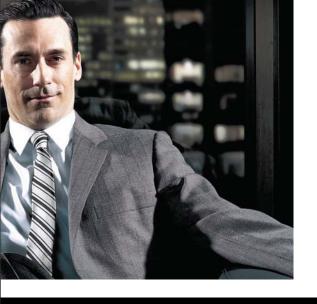
our economy. We were forced to cut our city government dramatically and eliminated nearly 3,000 employee positions. Our willingness to make the difficult choices has earned us the respect of Wall Street and other financial leaders.

New Orleans was the first municipality in Louisiana to have a recovery plan approved by the Louisiana Recovery Authority. Several of our projects are taking shape, and at least 61 additional projects are in the contracting and design stage. Our recovery has not occurred as rapidly as we would have liked because we have not had access to the federal dollars that have been promised. Even with these barriers, we have worked with the City Council to borrow more than \$45 million from other city projects to jumpstart critical public safety projects.

We are at a pivotal time in our city's development. We will move ahead with the vision of people from various backgrounds. Thank you again for visiting New Orleans, and I welcome you to become a part of our future.

(Ray Nagin is mayor of New Orleans.)







DEMAND THE BEST

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GUEST COLUMNIST

Leading the Pack, Today and Tomorrow

We see it everyday: competition across the board.
Consumers are inundated with ads hyping one service's superiority over the other. In this thriving marketplace, consumers are benefiting from more choice, greater convenience and better value than ever before.

Despite this intense competition and a tough economic climate, cable is poised to succeed with our mix of video, voice, data and more.

We started 60 years ago as entrepreneurs who conceived of an idea that delivered a better video experience at a good price. Now, once again, we're offering a superior video experience by embracing the high-def revolution to an extent barely imagined just a few years ago.

HD service is available to more than 100 million homes passed by cable, and our systems carry HD signals of local broadcasters in 209 of the 210 U.S. television markets. The two major satellite providers offer local broadcast HD channels in no more than 70 television markets.

Cable also is a volume leader in HD content. Our offerings in many markets include more than 1,000 hours of HD movies and programs delivered "on demand." We see ads from our competitors about their HD might, but they can't come close to providing the same amount of HD content.

Cable's program networks deserve much of the credit for the industry's HD success as they've created the quality programming that is driving America's love for HD. Just look at the sheer number of HD networks. Three years ago, there were only nine national cable channels available in high def. Today? More than 75, with plans to launch dozens more in the coming months.

Our customers are eagerly embracing HD. Nearly 14 million cable homes had HDTV-enabled set-top boxes as of year-end 2007, 53 percent growth for the year.

HD is just the beginning of cable's competitive advantage.

Cable has been the long-time leader in residential broadband, having been the first industry to roll-out high-speed Internet service to homes across the country. Cable's broadband rollout was the spark for America's adoption of high-speed Internet service, which has left the screeching tone of dial-up as an increasingly distant memory.

\$130 billion to build the most extensive and robust national broadband network, available to 92 percent of all American households. But we're not stopping there.

Many cable operators are now exploring the next step in broadband—wideband, which will enable even faster Internet service, propelling the U.S. into the 100-megabit era. Just as broadband opened our eyes to video streaming and content

sharing, wideband technology promises to drive the next Internet revolution, with new Web-based applications inspired by creative application developers and consumer needs.

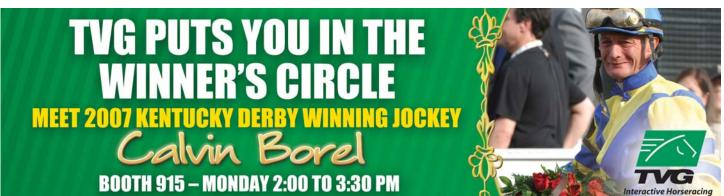
Cable's broadband platform also has enabled consumers to finally enjoy a real option for local phone service. With now more than 16 million digital voice subscribers, consumers are saving billions by subscribing to cable's enticing feature-rich phone offering. And of course, we are now looking beyond the home as major operators explore new technologies that will create the next generation of high-speed mobile wireless products. High-speed wireless represents an opportunity for cable to provide consumers with products that enable them to have anywhere, anytime access to information, communications and entertainment.

No one could have imagined 60 years ago what our industry would look like today. And the marketplace moves so much faster now that we can only guess at what it will look like 10 years from now. What matters is a willingness to compete and innovate. And we'll keep succeeding if we keep the spark of risk and entrepreneurship that defined the beginnings of our industry.

(Kyle McSlarrow is NCTA pres/CEO).



Kyle McSlarrow





Explore the world of natural beauty!

Please visit Veria TV at The Cable Show

Booth 237 Hall B for a natural beauty experience.

Roni Proter, host of Simply Beautiful, explores the world of natural beauty and fashion.

Monday 12:00-2:00 p.m. &

Tuesday 12:30-2:00 p.m



Also appearing:

Amanda McQuade Crawford, host of **What a Relief!** on Veria TV, shows you how to make and safely apply herbal treatments at home.

Monday 10:00 a.m.-12:00 p.m. &
Tuesday 11:00 a.m.-12:30 p.m.

Noelle Katai, host of **Everybody Nose** on Veria TV, will share her personal aromatherapy recipes for stress relief, travel woes and the work place. Monday 2:00-4:00 p.m. & Tuesday 2:00-4:00 p.m.

For the ultimate wellness treat join us at our **Relaxation Lounge** for a free massage. Open every day in **Lobby B1.**



Veria TV - the new network featuring 100% original HD Programming, dedicated solely to living a healthier, more natural lifestyle.

For more information contact **David Intrator** 817.804.4650 | david.intrator@veria.com

What a Relief

Please visit us at The Cable Show Booth 237 Hall B.

GUEST COLUMNIST

Chuck

CAB University & Cable Advertising Taking Center Stage

Once considered a separate part of the overall cable business, the success of new technology applications and the growth of cable network brands have made advertising one of the most talked about and anticipated elements of the 2008 Cable Show.

In 2007, cable advertising generated nearly \$25 billion in revenue with advertisers utilizing the various elements of cable (national, local regional spot and new media) to carry the heavy water of their marketing plans.

With a vibrant business and new technologies, there will be issues upon which to debate—and we'll try to address each of them here in the Crescent City.

Industry flashpoints such as television measurement in a digital age, the explosion of political advertising dollars and the continued growth of multiplatform integration are just some of the subjects that will be tackled.

In response to all the fervent interest, the Cabletelevision Advertising Bureau unveils CAB University—its advertising 'campus' at the Morial Convention Center.

Located at the center of the show near the main entry will be our full-fledged campus setting allowing attendees to learn more about the many developments in cable advertising.

Additionally, the "advertising alley" exhibitors area gives show goers the full breadth of what cable advertising can deliver in one location on the exhibit floor.

Now in its second year integrated into the Cable Show, the CAB sales management conference is designed to be a "show within a show."

Our agenda includes sessions, panels and exhibits

focused on providing the cable professional (whether you work in advertising or another part of the cable business) actionable information that can be used immediately upon returning to the field.

As with every year, the networks also play an important role by providing journalist talent to moderate panels, and this year's roster is no exception.

TV One's Roland Martin and CNBC's Scott Cohn (CNBC Squawk Box) will each moderate sessions, while AJ Hammer, anchor CNN and Headline Prime's Showbiz Tonight will emcee the 26th annual Cable Advertising Awards our annual black tie event that honors local cable advertising excellence, recognizing the best in sales achievement, creative production and sales promotion.

On Tuesday, cable advertising will take center stage with a Cable Show general session keynoted by top-200 advertiser Chrysler Motor's Chief Marketing Officer Deborah Meyer, who will discuss a number of topics important to advertisers in the video world.

Whether it's advanced advertising applications or original programming content, cable is being relied upon by marketers both large and small to engage consumers and carry them down the purchase continuum from initial awareness to in-store sale.

Advertising's presence at the Cable Show now reflects this reality.

Rather than simply celebrate cable's success, the CAB University sessions will delve deeper into the issues facing our business by attempting to answer key questions with insightful information that any guest can apply to their everyday job function upon departure from the Big Easy.

(Chuck Thompson is evp, stategic operations at the Cabletelevision Advertising Bureau).

WEAR IT & WIN!

BOOTH 3221

Stop by the ION Media Networks booth today to get your ION Television pin. Be seen wearing the ION Television pin today and you could win \$100!

For official rules and details, please visit the ION Media Networks booth (3221) at the NCTA or email: IONAffiliates@ionmedia.tv



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'Top Ops' Issue

The Stand-out Indie Operators and MSOs

Coming July 2008

This yearly issue recognizes top cable operators who have distinguished themselves by achieving excellence in technology, operations and Involvement in the community. The issue represents and honors all the independent operators fighting on the front lines, literally rolling up their sleeves to battle rivals that typically offer more product at a lower price. It also salutes the legion of MSOs as they battle the competition in video, voice and Internet access, while also working with content partners to bring customers HD programming and serve their local communities as they address important public affairs issues.

Beyond the Award Winners

The July issue will also include the following features:

- Anatomy of a Great Programmer Operator Relationship
- Cable Upshots: A look at the best young talent in cable
- 7 Ways to Make Money from HD
- · Best Places to Work in Cable
- New trends in cable advertising
- Home Security: The Next Big Wave in Cable?
- By the Numbers (an irreverent look at what numbers say about cable)
- Predictions: Our panel of cable operators prognosticate on what cable will look like 5 years from today

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CableFAX: The Magazine and
CableFaxMag.com – bringing you Innovation,
Leadership and The Cable Community.



September 2008 - Diversity Issue

Distributed at Diversity week New York, NY

October 2008 - The Top Cable Programs

Distribution: CableFAX Events & CTAM Boston, MA

November 2008 - Most Influential Women in Cable Distributed at the 24th Annual WICT Gala, Washington, DC

December 2008 - CableFAX 100 Issue

Distributed at the CableFAX 100 Luncheon, New York, NY

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CONTENT BUSINESS

Making Sense of the Confusion

We're proud that *CableFAX Daily* and its related magazines and online products are among the most respected and widely read in the cable industry. That's thanks largely to the incredible support our editors receive every day from all of our loyal readers and sponsors. We call upon you daily for information, insight and wisdom. And you have never let us down.

But lately, we've been getting restless. And as we watch cable's traditional TV content spread roots to new platforms like VOD, online, mobile and... who knows what's next... we find ourselves wondering how we can help you make better sense of it all. So we have embarked upon an effort to significantly expand our coverage of the ever-changing content business—from new metrics and advertising platforms to the very heart of how content owners are reaching their targeted audiences in new and more innovative ways. To complement our coverage in the Daily, we'll soon launch a new premium service called *CableFAX Content Business*. In it, we'll bring you all of the CableFAX analysis and news coverage you have come to expect, along with snapshots of the metrics and statistics that are driving the industry.

We're also working hard to build strong databases covering cable programs and the people who make this industry so great. It will take time, but we want to create a user-generated community of cable junkies who can help each other stay abreast of new developments and opportunities, among other things. This is only the beginning. As *CableFAX Content Business* grows over time, we will be calling upon you to be our partners, our enablers, and our eyes and ears on the ground as we go forward with this exciting new product designed to decipher the increasingly confusing landscape.

The following is just a sampling of what you'll get in **Cable-FAX Content Business**. Find out more at **www.cable360**. **net/ccb**. Let's see what we can build together!

Trend Analysis

Pivot Is Dead: Long Live Mobile Video

The demise of the cable industry's "Pivot" mobile service has certainly raised questions about whether consumers truly want to get their wireless fix from a cable company eager to sell them the "quad-play." But now that some of the same cable players have reframed their wireless ambitions under the **Clearwire** banner, it seems clear that mobile video remains a big part of cable's future. Pivot never even approached creation of a "mobile settop" that extended cable service into the wireless realm. But Clearwire's reliance on speedy WiMax technology offers a much better chance to do so. And macro trends suggest that mobile video—eventually supported by advertising and marketing messages—must remain a big part of the conversation over how to monetize cable content assets.

Consider This

It's undeniable that wireless is fast becoming a video-capable medium. Blame Apple and partner AT&T, whose iPhone juggernaut has heightened expectations and forced other mobile carriers to push suppliers to build more feature-rich mobile devices. And that's a big deal for content owners and their advertisers. "The ability to tag users with location, demographics, and behavioral data complemented by devices that support rich media to avoid having their role in the advertising value chain made obsolete must continued to push forward," says Julie Ask, vp at JupiterResearch, which just predicted consumers will spend \$2.2 billion on mobile messaging, display ads, and search via mobile technology by the year 2012. Meanwhile, **Analysys Research** projects that revenue from mobile media and ent services in the US will grow more than 110% by 2012, to \$6.6bln, with overall video services expected to account for 36% of mobile media rev. And a 2007 **comScore** study found that 67% of respondents who expressed interest in subscribing to mobile video said



CONTENT BUSINESS

that they would view sponsored ads to get free content. Some content owners aren't waiting: **The Weather Channel**, for example, late last year launched an ad-supported mobile video portal, with weather-report clips updated every half hour. How much would **Best Buy** pay to target an ad to an out-and-about, tech-savvy consumer watching a news clip on a GPS-enabled mobile device while sitting two blocks from a retail store?

What's more, Verizon and AT&T are already using Qualcomm's "MediaFLO" service to offer one-way streaming content from several cable TV networks such as Comedy Central and CNN right to mobile handsets. (Verizon launched its mobile TV service last year; AT&T launches mobile TV this month). And both just spent billions to stake out beachfront property in the 700-MHz wireless band (ironically, the former home of broadcast TV signals) to create super-fast 4G networks that will enable millions of video streams to bounce from device to device via WiMax and other wireless broadband technologies. Verizon's winning bid for the "C block" of the 700-MHz spectrum is especially interesting because the government—heavily pressured by Internet powerhouse Google—placed strict openness requirements on that spectrum. Google can now license its "Android" open-source mobile platform to myriad device makers eager to build video-capable 4G devices.

As the telcos build out these 4G networks over the next few years, it's obvious why big cable operators sitting on \$2.4 billion worth of AWS spectrum they won in 2006 under the SpectrumCo banner are now looking to do something with it. That means even more wireless bandwidth out there—and even more potential revenue for content owners looking to create original content and/or repurpose linear and broadband fare for the mobile universe. Imagine a market flooded with wireless-enabled, video capable devices from cell phones to clock radios to... household appliances. Video will be everywhere. And content owners are in a great position to attach marketing messages to every piece of video tailored for the expanding universe of video-capable devices.

The Takeaway

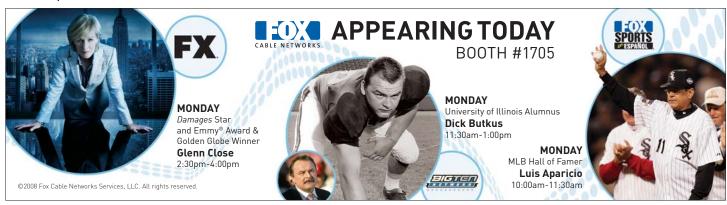
The death of Pivot won't affect mobile video growth or opportunities for content owners. Wireless bandwidth will continue to expand as advanced wireless technologies proliferate, driving more feature-rich devices that in turn drive more consumer demand and usage. Reasonable people can disagree about the level of urgency to do mobile deals, considering mobile video's nascent state. But isn't it better to think ahead than be caught unaware when this stuff finally does become ubiquitous?

...OK. So What Else Will You Get?

That was just a quick sample from *CableFAX Content Business*' Trend Analysis section. But it's only a small part of the overall picture. In addition to thoughtful analysis of content trends, you'll also get daily news about ratings, metrics, advertising trends and other aspects of the ever-changing content business. You'll hear about new platforms and what content is performing best on each one. In our Campaign Tracker section, you'll get quick and convenient rundowns of marketing campaigns surrounding new and returning cable shows. And, of course, our Data Points section will give you important snapshots of linear TV, VOD and online performance—all while the Ad Tracker section will give you a sense of where those vital advertising dollars are flowing.

Meanwhile, expert columnists will keep you on your toes with thought-provoking essays. And our evolving databases of cable's people and shows will be an important resource that will only get better over time.

Best of all, *CableFAX Content Business* will focus on the cable side of the business. We'll ask how cable can do a better job gaining more ad share, improving performance vs broadcasters and leveraging assets such as VOD and broadband to increase viewership. The multiplatform world has made your job tougher than ever. Let's figure it out together, and seize the opportunity!



CableCares

Cable's Finest Hours

After a while, cable show memories tend to blend together. For several hundred cable volunteers who spent a long, steamy Saturday in New Orleans re-proving the axiom that cable's strength is rooted in local communities, The Cable Show '08 will stand apart for years. For many volunteers, the day began before 8 am, as they boarded busses from the Convention Center for a 10-mile trip to areas whose encounter with Katrina three years ago remains too visible. The landscape the busses passed was a pastiche of abandoned homes next to FEMA trailers next to pristine houses, where families obviously have renovated.

The Children Are Our Future

For the majority of volunteers, their memory filled day was spent helping New Orleans' children. A pair of schools was wired for cable and Internet access by volunteer techs from cable ops and vendors, including **Cox**, **Motorola**, **Comm-Scope**, **Juniper Networks**, **LG** and **Intel**.

Those transformations highlighted cable's brain power. Two other schools— more exactly, trailers grouped together and serving as schools—were on the receiving end of cable's elbow grease. When cable volunteers began the day at Reed and Williams elementary schools, they found water-logged soil, mud and a humid smell. When they left nearly 8 hours later, the water-logged soil had been replaced by dry mulch. To the delight of children, parents and teachers, atop the mulch were spanking new swings, slides and jungle gyms, gleaming in the Sun.

At Reed, whose rebuild was sponsored by **qubo Channel** and **Ion**, kids frolicked in their new playground with Larry the Cucumber and Bob the Tomato. At Williams, grateful 1st graders serenaded volunteers with a *Stevie Wonder* song, adding rap lyrics that included "cable cares." Later Nickelodeon treated them to a performance by The Naked Bros band, and, of course, **Nick** brought its slime truck.

Mud In Your Eye

Also shining despite the mud were cable's volunteers,

including former **NCTA** senior staffer *June Travis* and **CTAM**'s normally pristine *Seth Morrison*, beaming in a mud-stained tee-shirt at the Reed school. "We started with six inches of solid mud," he said at day's end, but the "very well-organized people from KaBoom! [a non-profit that's built nearly 40 playgrounds in New Orleans since Katrina] knew exactly what to do."

Nearby was our *Paul Maxwell*, smiling in filthy sneakers. "We literally carried an 18-foot pile of mulch over to the playground," he said. "Everyone worked their asses off." One of cable's dirtiest was **Audible Magic**'s *Jeremy Stern*, knee-deep in mud. But Stern was sanguine. "I'm used to rolling around in the mud as a former cable lawyer," he joked. But the day was not a joke. **Fox Cable**'s *Matt Grim* spent several hours in the nurse's office having thrown out his back. By day's end, he seemed fine.

Also smiling late yesterday was **Cable Positive**'s *Dana Levitt*, who conquered her fear of heights to help build a 440-foot wall at a Unitarian church that prepares meals for AIDS patients. "Not bad for a jewish girl from Long Island," she said. Said Cable Positive chief *Steve Villano*: "I spent my day gardening [at a New Orleans home for AIDS patients] with [**SES Americom** media pres] *Bryan McGuirk*." Yesterday Villano and his small staff were supplemented by **NBCU** employees at the AIDS homes, and **Rainbow**'s *Josh Sapan* donated 35 works of art to two of the homes.

Just blocks away from The Convention Center, **The Sportsman Channel** and 50 volunteers prepared and served lunch to homeless men. The fare was venison, donated by local hunters. Helping were groups from **Charter**, **ACA**, **CAB** and NCTA, including a striking blond named Alison McSlarrow. After a photo op at the homeless shelter with show co-chairs Rocco Commisso and Debra Lee, Kyle McSlarrow joked, "My wife did the work and I pose for pictures." Is that the case at the McSlarrow home? "No," Ms. McSlarrow said. "I don't cook, and [Kyle] can't fix things. It's worked for 10 years." The good memories of cable's work on Sat will last even longer.

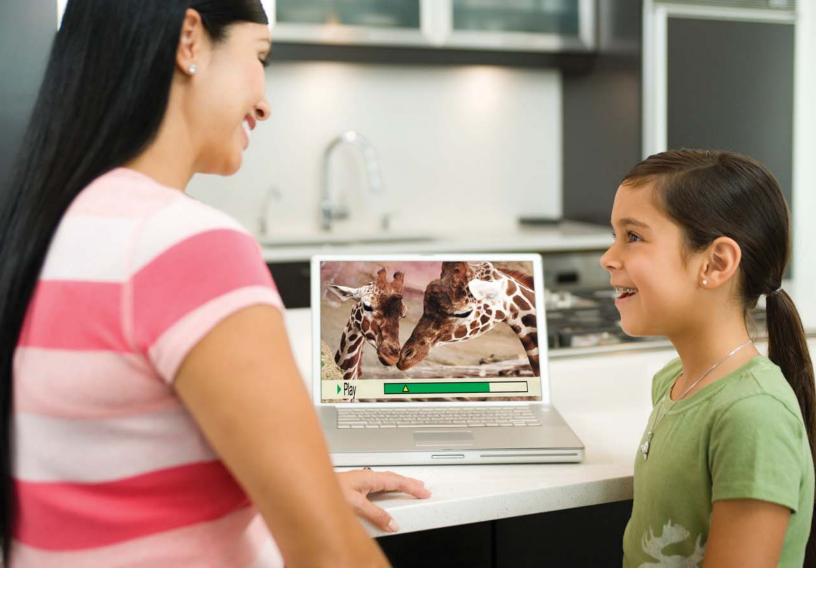


CableFAX Digital Webinar: Marketing HD & Breaking Through the Clutter

At this June 12th Webinar, you'll learn the smartest marketing and communications strategies and tactics to succeed with your HD initiatives in this highly competitive and fragmented media environment.

Thursday, June 12, 2008 1:30-3:00 pm (ET)

Register Now at Cable360.net/cfax/webinars



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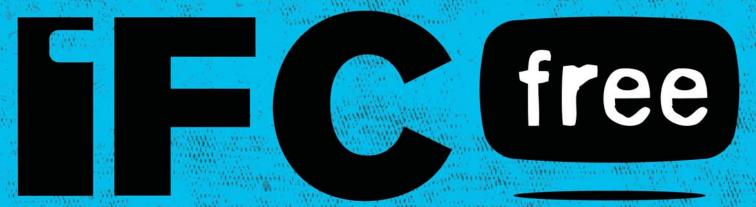
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