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CableFAX Daily™

Monday — May 21, 2012

What the Industry Reads First

Volume 23 / No. 097

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Power Play: Energy Efficiency Gets Greenlight from Cable Show Vendors

Cable operators have always loved those greenbacks, but the color green also has a new meaning for today's distributors. And vendors are well aware that the buzz phrase "green energy" will resonate at this year's **Cable Show** in Boston as they use displays and demonstrations to answer an industry ultimatum to cut energy consumption or be left behind by operators who want to do more with less. **Comcast** svp, strategic planning **Mark Coblitz** dropped the gauntlet during the **SCTE** Smart Energy Management Initiative (SEMI) forum in Philly in March when he said that the industry needs a new mindset to address energy issues. "When we talk about innovation in this space, we're talking about how you change the way things are done," Coblitz said. Vendors, of course, know the way things are done always changes, and energy is just the latest wrinkle. They've long worked within industry and govt organizations, including **Cable-Labs**, **SCTE** and **Energy Star** to address power consumption issues. But it's no easy feat to build a high-performance always-on product that doesn't guzzle electricity like a Hummer gulping gas on the highway. "Operators keep requesting more features, higher processing, more networking capabilities, more memory and it's going in the wrong direction in terms of being able to get efficiencies; but we've been able to do it," said **Evan Groat**, sr dir of A-QAM set-tops at **Motorola Solutions**. Building and using energy-efficient system-on-a-chip components is a start. Using advanced software to tell CMTS and set-tops to sip, not gulp, electricity is another. But the biggest trick is to accomplish these energy savings while sating always-on consumer demand with devices that never sleep even if the users think they're napping. "In the past, when you pushed the power button all you did was turn off the LED and the remainder of the box continued to run," said **Bill Wallace**, sr dir in **Arris'** hardware development group. Now, he said, vendors must find ways to selectively shut off functions without impacting overall performance. "It's challenging," agreed **David Clark**, product management dir in Cisco's service provider video technology group, who said his company is "reaping benefits" from experience with mobile and cellphone technology where energy conservation keeps products operating for more than the New York minute. "A lot of that has been rolling more into our space on the set-top box side." Vendors also have experience working outside the cable space with other video delivery systems and outside the U.S. **Pace Americas** cut its energy-efficient teeth building set-tops for **DirectTV** where it learned "it's all about managing the box and manag-



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ing its own efficiency; like going into active standby, going to sleep when appropriate,” said *Ashley Glover*, vp, marketing and communications. On display in CableNET’s Energy Lab exhibit, will be set tops with light sleep modes, cable-delivered Smart Home services and other offerings. Over at show’s Imagine Park, CableLabs and SCTE reps will participate in a session titled “Smart Energy: The Power of Broadband.” SCTE will have its standards plan and timeline for energy management at its booth. What it’s really all about—and what no doubt will be under the LED spotlight in Boston—is walking across the tightrope operators have strung between delivering higher performance products with a meager energy budget. Fall off that rope, vendors know, and the business dies. - *Jim Barthold*

Q&A with ESPN pres/Disney Media Nets co-chmn John Skipper: **Do you think we’re reaching a ceiling where sports right just can’t go any higher?** We have felt for some number of years that because sports is the only unique property in entertainment—everything else can be knocked off; but there’s only 1 Rose Bowl, only 1 NBA finals—because of the uniqueness and because it has to be watched live, the value of sports rights is going to appreciate. I think that is going to continue to be the case. 99.4% of all the viewing of ESPN is live. Some believe to monetize these expensive sports nets, there will have to be some sort of sports tier. **Do you ever think ESPN might be broken away from the main video packages?** We do not believe it’s a good idea for anybody. ESPN is a central component of the value of a pay television subscription, and we think that value is clear. We are the single most valuable component of a pay television subscription. It won’t work for a consumer, who will end up paying more money on an a la carte basis, and it won’t work in our opinion for the distributor, who will break off its single most valuable property into a tier. We don’t think it works for anybody. We don’t think it will happen. **What sort of returns are you seeing from WatchESPN?** We’re up to 40mln (available HHs). More than 8mln have downloaded the application. We have some research in that says 73% of the people who have used WatchESPN say it makes them feel more favorable towards their service provider. Another 77% say it would be important for them to retain WatchESPN if they were going to change providers. In other words, it’s a retention tool. **Do you worry about the threat of rivals—people point to NBC Sports and there’s rumblings that Fox might try to launch a competitor?** We’ve always had competition. Because there are a few high profile folks who have entered or discussed entering the 24/7 sports cable TV business, there has been an emphasis on “new” competition for ESPN. I tell people the next rights negotiation I enter into that doesn’t have a 2nd bidder will be the first. We are always cognizant of a significant number of competitors across a lot of platforms. We compete with everybody. The leagues have their own networks. Yahoo Sports has a fairly significant sports Internet site. There are a lot of mobile providers of sports. **In hindsight, was the Longhorn Network a mistake?** No. Hindsight doesn’t happen for a long time. We are about 1 year into a 20-year deal. We believe it will prove to be a successful business venture. It’s already a great product. We think over some amount of time—somewhere between 1 year and 20 years—it will prove to be a good business. It took multiple years to get ESPN2, ESPNNews, ESPNU distributed, so this is not a surprising or unique occurrence. **You’ve been president since Jan. Biggest takeaway?** The gratification and support I’ve gotten internally and externally. It’s allowed me to have a really positive transition. I’ve had the benefit of *George [Bodenheimer]* helping me. We have a very senior, stable exec mgmt group, and we have 7K employees working hard.

Technology: TiVo is introducing a low-cost IP set-top to extend the TiVo experience to additional set-tops in the home. It works with the TiVo Premiere Q. It’s also unveiling TiVo Stream, which provides transcoding to enable con-

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tent viewing on mobile devices. Both products will be made available at retail and through select cable operators. -- As TV Everywhere gains momentum, **Time Warner Cable** selected **Motorola Mobility's** "SecureMedia" for secure multi-screen content delivery. SecureMedia Encryptonite ONE HLS+ streamlines video distribution across a variety of devices and avoids the cost and complication of operating multiple streaming platforms and security systems to reach multiple device types. -- **Arris** and **NDS** announced integration of the Arris Media Gateway and NDS middleware, DRM and user interface. The integration is being architected in close collaboration with several N American cable ops, Arris said. NDS is the 1st 3rd-party supplier to integrate its software with the Arris Media Gateway and Media Players. -- **Time Warner Cable** selected **BlackArrow** to launch dynamic VOD ad insertion. The 2 said it will provide one of the "critical cornerstones that are essential to creating a nationwide footprint of dynamic on-demand ads," while TWC will also be able to use the system to increase availability of commercial inventory on a local and regional level. -- **SeaChange** and **Avail-TVN** will demo their multi-screen ad targeting ecosystem for targeted advertising in broadcast and VOD streams on TVs, PCs and tablets. -- **Itaas** has licensed Comcast Reference Development Kit, a pre-integrated software bundle that powers tru2way, IP or hybrid set-tops and includes the CableLabs OCAP reference implementation software. Itaas will be able to provide software development, integration and testing services to set-top and chip manufactures as well as MSO planning to take advantage of the RDK initiative.

Aereo Week: With a hearing for a temporary injunction against **Aereo** set to take place in just a couple weeks, the start-up and its \$20.5mln investor **IAC** hosted the closing night party for Internet Week at IAC's HQ in NY Thurs. No one seemed concerned about the potential of a temporary shutdown ahead of the trial in a lawsuit filed by broadcasters, least of all founder and CEO of Aereo, **Chet Kanojia**, who just doesn't understand what all the fuss is about. Broadcasters have cried copyright infringement against Aereo for signal retransmission, but in his view retransmission regs only apply to "community antennas," he told **CableFAX**, and that Aereo is providing "personal," "cloud-based" ones for a \$12/month fee—not manning a community one. "I am a lowly antenna manufacturer that supplies a cooler, simpler, better mousetrap for the consumer," he said. "A consumer, today, can go get an antenna, stick it up on their roof—an individual antenna—personal—and the idea is not they're sharing it with the community. They can get a single antenna, at TiVo retail and go get a **Slingbox**. That will be exactly what we're doing." But it wouldn't be as "cool and pretty" he added quickly. For the moment only New Yorkers can access the cool, pretty stuff through any WiFi, 3G connection. The median age of cable subscribers is getting older, he said, so there's an "underserved" younger demo, which he's looking to tap. "They're technically savvy, and they're interested in exploring and finding an alternative. They use a lot of online consumption, they're comfortable renting movies from **iTunes** and **Amazon**, and what they lack is what they're entitled to—which is broadcast." On whether online video should be regulated as broadcast and cable, he said the current set of regs is outdated. "Internet wasn't really a medium at that point and it needs to be considered in the equation." Time will tell if Kanojia's argument holds up in court, but everyone will be watching.

More Universal: **Universal Sports**, which made the transition from a digital multicast service to a subscription fee-based cable net Jan 1, is upping the ante in its negotiations for carriage by launching virtual channel "Universal Sports Max." It will provide more than 500 hours/year of live event programming available to affiliates for distribution across all their media platforms, including TV, Web, mobile and tablets. "This is digital content that we simply can't fit onto the 24/7 linear cable net," said Universal Sports CEO **David Sternberg**. World cup speed skating, rugby sevens, skiing and more will help fill Universal Sports Max, which launches in Aug. **DISH** and **DirecTV** offer Universal Sports on sports packages, as do some medium and small cable ops, but it lost distribution with multiple MSOs (including **Comcast** and **Time Warner Cable**) with the transition to a cable net. "We are in advanced discussions with just about everybody else in the industry, including major cable MSOs and both of the major telcos," Sternberg said. "Our hope and expectation is that we will have some

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further distribution announcements between now and the start of the Olympic Games.” Live Olympic events will be on NBCU nets, but Universal will have live, daily updates. Following the conclusion of the Games, it will have a replay of all the best moments from London. Sternberg believes Universal hits underserved fans who are “starved” for exposure to these sports and athletes more than once every 4 years. While some nets are reluctant to join sports tiers, Universal is fine with it. “We’re not adverse to that. We’re willing to roll up our sleeves and work hard from the marketing and promotional standpoint and reach out to the participants of these sports, of which there are over 35mln in the US,” Sternberg said.

At the Portals: New America Foundation, Public Knowledge and the Consumers Union told the FCC that it should require DISH to meet certain conditions if it awards the company satellite spectrum to be used for land-based broadband services. They want half the capacity available for open wholesale leasing or roaming by other carriers at non-discriminatory rates; the Commission to approve any deal that makes more than 25% of the data-traffic capacity available to a single carrier; and other parties should be able to make use of unused spectrum until DISH actually deploys service. Oh, and they want “unjust enrichment penalties” if DISH turns around and sells the spectrum to AT&T or Verizon.

VOD: Anime Network inked a deal with In Demand to handle all transport of its service to subs beginning Thurs. More than 40 programmers currently use In Demand to deliver their VOD content to homes across N America.

Streaming: Epix said its recent free preview weekends have resulted in more than just sampling of the linear net. During a preview Apr 27-29, the net streamed more than 200K hours of content to viewers via the Epix app. The number of downloads of EPIX apps tripled over the weekend compared to the entire previous month. To date there have been 5mln downloads of the EPIX app on all devices, including Android powered phones and tablets, Roku players, Xbox consoles, and iOS devices like the iPad, iPhone, and iPod Touch. In the past 6 months, EPIX app downloads have more than doubled since the launch on Xbox and iOS devices.

Programming: GMC unveiled its 1st-ever original reality series development slate, consisting of 13 series. Among them: “The Bulloch Family Ranch,” featuring parents of 25 kids they have taken in (one is now a NY Jets running back); “Earth Angels,” a team tries to make a positive impact in the lives of Americans who are due a miracle; “For the Record,” following 2 record promoters and moms as they balance their high profile music clients and families; and “Restoring Faith,” a crew that tackles church restorations. -- Outdoor is adding several new shows to its '12-'13 lineup, including “Elite Tactical Unit,” a 1-hour series featuring Special Weapons and Tactics teams going head-to-head in missions. In Q3, the net debuts “Sasquatch,” starring mountain man Laramy Miller, who traverses the Canadian Rockies to the plains of the Midwest, surviving off the land, and “Outfitter Bootcamp,” which follows 12 students as they try to win approval of big-game outfitter Tim Doud.

Get Your Tech On: In its 20th exhibit at the Cable Show, CableNET, presented by CableLabs in association with NCTA, will demo nearly 40 different technology solutions to broaden the consumer experience, with an added focus this year on a newsworthy topic: energy-efficient solutions for set-top boxes. Other themes include gateways, interactive advertising and multiscreen solutions. In addition, for the 2nd year the CableNext Showcase will highlight cable innovations in delivering video to devices using IP content distribution. “While most of the CableNet exhibit is built around exhibits provided by



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suppliers to the industry, CableNext showcase is really highlighting MSO innovations,” said CableLabs CTO *Ralph Brown*. Approximately 9-10 demos will be shown at CableNext, in 3 categories: digital, cable-based technologies; video delivery using IP within the home; and all IP delivery—via tablets, phones and other devices. CableNext was formed in light of the substantial progress the industry has made the last couple of years, Brown told CableFAX. Compared to last year, the number of devices has gone up and the types of services delivered has expanded. Another thing that’s different in 2012, said CableLabs CEO *Paul Liao*, is the type of devices on display. Last year, the exhibit showed a few TVs and an iPad, while this year other types of tables, phones, and a game console will be shown. In the Energy Lab area they’ll be highlighting a “light sleep” mode for set-top boxes, the first milestone of the NCTA’s energy initiative. Largely relating to cable DVR STBs, the mode will reduce energy consumption by 20-30%. Also on tap is **Comcast** Xfinity Home’s energy management. Only have a few minutes to check out the exhibit? Liao recommends checking out the CableLabs area for the “metaio” prototype application, which brings an augmented reality experience to the customer. They’ll also be showcasing STBs that automate 3D content, so consumers don’t have to press a million buttons to get your TV into 3D mode.

On the Show Floor: Plenty of booth happenings on the floor today. Here’s a sampling: Strike your best Heisman pose. The famous trophy will be at **ESPN’s** booth from 12:30-2pm (If you want to find **CableFAX** editor *Amy Maclean*, try hitting the booth Tues at 11am when UGA’s Hairy Dawg makes an appearance. Maybe you’ll also spot fellow Georgia alum/**Turner Ent Nets** pres *Steve Koonin*). -- At lunch time, swing by **TNT’s** set-up for some BBQ sliders, corn bread and sweet tea in honor of upcoming series “Dallas.” -- **Hallmark** hosts a cocktail party at 3pm with CEO *Bill Abbott* and celebrity guests *Marie Osmond* and *Kellie Martin*. There will be a drawing for distributors to a trip to Vegas with special backstage passes to Osmond’s show. -- Make sure to stop by **RLTV’s** booth and tell them your favorite person over 50. That’ll enter you in a drawing for 2 Vespa scooters. -- Get a photo for the kids of **Sprout’s Super Why** at the **NBCU** booth (3:30pm). -- Meet *Bill O’Reilly* at Fox News Channel’s exhibit space from 2pm-2:30pm. Earlier in the day, *Gerri Willis* of **Fox Business’** “The Willis Report” will be at the booth (11:45am). -- *Steven Strait* and *Elena Satine* of **Starz’s** “Magic City” will be at the net’s booth cocktail hour at 3pm, Mon. -- **Discovery’s** famous smoothie bar will be back in business, serving up pomegranate punch alongside lots of 3D. -- **INSP** has *John-Boy Walton* (*Richard Thomas*) from 11am-1pm and 3-5pm. -- Bluegrass musicians *Rich Stillman* and *Joe Singleton* will be at the **BlueHighway** booth at various times Mon.

Q&A with new NAMIC CEO Nicol Turner-Lee: What about this job appealed to you? Coming out of the public policy sphere, I’ve spent a lot of my time on the consumer side at the Joint Center and One Economy. Coming to NAMIC gives us the opportunity to shift the conversation to discuss more of how we create an inclusive environment on the industry side. What attracted me most to this position is that the cable industry is ready to be effective in our diversity metrics. NAMIC is positioned to be very helpful and solution-oriented as the industry moves forward. **Given your background, will we see more research initiatives at NAMIC?** Yes, definitely. I spent most of my career creating evidence that creates a compelling case for good public policy. At NAMIC, I’m hoping to generate more research reports that provide the evidence for good



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business... I think NAMIC does a great job when it comes to convening resources, getting the acknowledgment of leaders of color in the industry and ensuring that talent is prepared and effective to move up the ranks. I think where we could do an even better job is to provide some guidelines or a glide path for what those metrics look like so we as an industry can strive to meet those metrics. **How would you rate the industry on diversity?** We definitely have a lot of work to do. All of the statistics that we have from the last AIM employment research study demonstrate that while we have experienced some increases in representation and inclusion of people of color in senior mgmt roles, we still have more to do because they're still under 20% for the most part. On the entertainment side, we still have a lot to do with on-screen representations. And we need to increase [diversity] among writers, producers, decision makers. I would not say we're perfect, but we have to know what those metrics are so we can at least start somewhere... Our audiences nationally are becoming more diverse. NAMIC wants to be there to help the industry grow into becoming much more responsive to diversity inclusion.

Debate Smackdown: **CableFAX** Exec Editor *Michael Grebb* will likely show no mercy as "chairman" of **Halogen TV's** much-anticipated debate at 3pm Tues in Imagine Park, with Harvard and Columbia squaring off on one question: "Is Cable Doing Enough to Keep Millennials?" Judges include **Time Warner Cable's** *Peter Stern*, the *L.A. Times'* *Joe Flint* and media consultant *Diane Mermigas*. Will Grebb, intoxicated with power, behave like King Joffrey from "Game of Thrones"? Probably.

Public Affairs: Cartoon will kick off its 3rd "Move It Movement Tour" June 10 in Atlanta. The tour, in partnership with the **President's Council on Fitness, Sport & Nutrition** and First Lady *Michelle Obama's* "Let's Move," will hit 17 markets (sponsored locally by cable affils). -- **Military Channel** will air a series of PSAs this summer highlighting 12 governors as they express their gratitude for those currently serving, or having served, in the military. **Destination America** will run a slate of PSAs promoting domestic tourism. Commerce Secretary *John Bryson* and Interior Secretary *Ken Salazar* will spotlight America as a destination. -- For the 5th consecutive year, **Sportsman Channel's** "Hunt.Fish.Feed" hit the **Cable Show** to help feed local residents in need. Sun's event was slated to be held at the Pine Street Inn shelter in Boston's South End. Local sportsmen helped donated venison for nutritious tacos.

On the Circuit: **Bravo** is bringing its "Top Chef: The Tour" to Boston to coincide with **The Cable Show**. Past contestants *Hosea Rosenberg* and *Tiffani Faison* will compete in a live, cook-off, Tue and Wed, 1 Faneuil Hall Marketplace.

People: **ESPN** upped *Scott Parker* to vp, consumer marketing. -- Several promotions at **Inspiration Networks**. *Dale Ardizzzone* was upped to COO. *Kyle Chowning* was promoted to svp, marketing, and *Christine Rodocker* was elevated to vp, affil marketing. -- **NuvoTV** elevated *Sara Auspitz* to vp, programming. -- *Tom Oliver*, former **HBO** exec and co-founder of **DMX Music**, has joined **ONE World Sports** as sr adviser for market dev and branding. The intl sports programming net is new to the US and features a lengthy roster of cable vets, including former **ESPN** distribution exec *Dick Stone*; former HBO affil sales head *Peter Frame*; *Radame Rodrigues*, a veteran brand marketer at Comcast and ESPN; and *David Andersen*, former head of comm at **Cox**, **CNBC** and **Charter**. The English-language net is aimed at fans of popular professional sports from Asia and around the world. It is owned by **ONE Media Corp**, which also owns **America ONE TV** and live PPV sports service **ONE Sports PLUS**.

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Company	Ticker	5/18 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
DIRECTV:	DTV	45.38	(4.6%)	6.13%
DISH:	DISH	28.48	(7.62%)	0.00%
DISNEY:	DIS	43.81	(3.84%)	16.83%
GE:	GE	18.95	(0.32%)	5.81%
NEWS CORP:	NWS	19.47	(5.07%)	7.10%

MSOS				
CABLEVISION:	CVC	11.09	(11.7%)	(22.01%)
CHARTER:	CHTR	61.68	(8.61%)	8.32%
COMCAST:	CMCSA	28.27	(3.76%)	19.25%
COMCAST SPCL:	CMCSK	27.99	(3.55%)	18.80%
GCI:	GNCMA	7.01	(2.09%)	(28.4%)
KNOLOGY:	KNOL	19.40	(0.61%)	36.62%
LIBERTY GLOBAL:	LBTYA	46.38	(8.65%)	13.04%
LIBERTY INT:	LINTA	17.06	(7.28%)	5.18%
SHAW COMM:	SJR	18.80	(1.93%)	(2.94%)
TIME WARNER CABLE:	TWC	74.07	(3.99%)	16.52%
VIRGIN MEDIA:	VMED	21.48	(4.15%)	0.47%
WASH POST:	WPO	333.00	(0.95%)	(11.63%)

PROGRAMMING				
AMC NETWORKS:	AMCX	39.64	(4.94%)	5.48%
CBS:	CBS	30.56	(6.83%)	12.60%
CROWN:	CRWN	1.50	(0.66%)	23.97%
DISCOVERY:	DISCA	48.37	(5.88%)	18.06%
GRUPO TELEVISIA:	TV	19.65	(4.15%)	(6.7%)
HSN:	HSNI	36.88	0.90%	1.71%
INTERACTIVE CORP:	IACI	44.10	(9.11%)	3.52%
LIONSGATE:	LGF	12.22	(1.53%)	46.88%
LODGENET:	LNET	1.59	(10.67%)	(33.47%)
NEW FRONTIER:	NOOF	1.52	(3.18%)	47.57%
OUTDOOR:	OUTD	6.59	(3.65%)	(11.66%)
SCRIPPS INT:	SNL	50.80	(6.22%)	19.75%
TIME WARNER:	TWX	34.27	(5.72%)	(5.17%)
VALUEVISION:	VVTV	1.52	0.00%	(19.15%)
VIACOM:	VIA	50.95	(0.86%)	(4.46%)
WWE:	WWE	8.24	(5.83%)	(11.59%)

TECHNOLOGY				
ADVANTAGE:	AEY	2.25	(7.02%)	7.14%
ALCATEL LUCENT:	ALU	1.44	(4.64%)	(7.69%)
AMDOCS:	DOX	29.35	(2.46%)	2.87%
AMPHENOL:	APH	51.19	(5.27%)	12.78%
AOL:	AOL	26.01	(0.19%)	72.25%
APPLE:	AAPL	530.38	(6.41%)	30.96%
ARRIS GROUP:	ARRS	11.82	(5.52%)	9.24%
AVID TECH:	AVID	7.05	(4.21%)	(17.35%)
BLNDER TONGUE:	BDR	1.00	(15.97%)	(18.03%)
BROADCOM:	BRCM	31.32	(7.31%)	6.68%
CISCO:	CSCO	16.47	(0.18%)	(8.9%)
CLEARWIRE:	CLWR	1.18	(6.35%)	(39.18%)
CONCURRENT:	CCUR	3.60	(2.17%)	(5.01%)
CONVERGYS:	CVG	12.99	2.61%	1.72%
CSG SYSTEMS:	CSGS	16.37	(0.97%)	11.28%
ECHOSTAR:	SATS	26.75	(3.25%)	27.75%
GOOGLE:	GOOG	600.40	(0.8%)	(7.04%)
HARMONIC:	HLIT	4.09	(3.31%)	(18.85%)

Company	Ticker	5/18 Close	1-Week % Chg	YTD %Chg
INTEL:	INTC	26.07	(5.65%)	7.51%
JDSU:	JDSU	9.86	(7.76%)	(5.56%)
LEVEL 3:	LVL	22.30	(8.15%)	31.25%
MICROSOFT:	MSFT	29.27	(6.07%)	12.75%
MOTOROLA MOBILITY:	MMI	39.20	(0.08%)	1.03%
RENTAK:	RENT	15.78	(7.29%)	10.50%
SEACHANGE:	SEAC	7.94	(3.17%)	12.94%
SONY:	SNE	13.77	(2.89%)	(23.67%)
SPRINT NEXTEL:	S	2.34	(6.02%)	0.00%
TIVO:	TIVO	9.28	(15.48%)	3.46%
UNIVERSAL ELEC:	UEIC	13.81	(7.13%)	(18.14%)
VONAGE:	VG	1.70	(3.41%)	(30.61%)
YAHOO:	YHOO	15.42	1.78%	(4.4%)

TELCOs

AT&T:	T	33.66	0.21%	11.31%
VERIZON:	VZ	41.53	0.90%	3.51%

MARKET INDICES

DOW:	DJI	12369.38	(3.52%)	1.24%
NASDAQ:	IXIC	2778.79	(5.28%)	6.67%
S&P 500:	GSPC	1295.22	(4.3%)	2.99%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. CONVERGYS:	12.99	2.61%
2. YAHOO:	15.42	1.78%
3. HSN:	36.88	0.90%
4. VERIZON:	41.53	0.90%
5. AT&T:	33.66	0.21%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. BLNDER TONGUE:	1.00	(15.97%)
2. TIVO:	9.28	(15.48%)
3. CABLEVISION:	11.09	(11.7%)
4. LODGENET:	1.59	(10.67%)
5. INTERACTIVE CORP:	44.10	(9.11%)



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DATA POINTS



Always Searching...

If you've frequented CableFAXDaily.com, you already know that we track various industry data with the help of our data partners. So we asked one of those partners—**Compete Inc**—to do something special for this year's Cable Show. With online video and supplemental content all the rage, we wanted to know a little something about how those online eyeballs land on cable network and operator sites. Where do they come from? And how does the traffic differ between cable programmers, operators and third party sites like **Hulu** and **Netflix**? To be sure, it's an interesting mix. "While each solution type may vary in their business model, they are all competing for the same audience, which is creating an increasingly competitive market," says *Lauren Orski*, Compete's senior associate in technology and entertainment.

Of course, OTT favorites Netflix and Hulu continue to dominate, with 50% of video viewing traffic. But Orski points out that **Comcast** has made incredible strides with its **XfinityTV** site "by both coming to market with an effective brand awareness campaign and leveraging their existing customer base." She also notes Comcast's recent Streampix launch, "which is a direct threat to Netflix and which is expected to drive additional OTT viewing share." So as the market fragments, the distinction between OTT and more traditional sites

could blur. "When comparing Telecom, Network and Stand-alone sites, search is being used by video viewers considerably more to get to network sites," Orski notes. "Not only is there a variation in search use but keywords driving traffic to site differs between OTT solution types." Interestingly, the chart below shows that much can depend on the keyword searches of consumers—especially when comparing searches for providers (like Xfinity or Netflix) with searches for show titles.

Video Viewing Uvs	March'12 % Share	Q1'12 (Aggregate) % Share
abc.com	8.1%	8.8%
blockbuster.com	0.3%	0.3%
cbs.com	9.2%	8.9%
Dishonline	0.4%	0.5%
go.espn.com	5.0%	5.1%
fox.com	2.7%	3.4%
hbogo.com	0.1%	0.1%
hulu.com	18.8%	19.8%
nbc.com	8.7%	9.2%
netflix.com	29.8%	26.7%
tbs.com	0.3%	0.6%
tnt.com	0.4%	0.6%
tv.com	0.7%	1.0%
UverseOnline	0.3%	0.5%
xfinitytv.comcast.net	13.1%	11.8%
youtube.com	2.1%	2.7%

ONLINE OTT AVERAGE	6AM-Noon	Noon-4PM	4PM-8PM	8PM-11PM	11PM -6AM
March'12	21%	21%	26%	17%	15%
Q1'12 (Aggregate)	20%	22%	27%	17%	15%

And by the way...

Compete just compiled a white paper exploring OTT growth and examining the evolving OTT landscape. It also looks at the impact of telecom provider applications and OTT features on telecom shopping and customer behavior. **Check it out at:** <http://success.compete.com/overthetop>

Top Search Terms- March'12				
ABC	CBS	Hulu	Xfinity	Netflix
abc	cbs	hulu	xfinity	netflix
abc.com	cbs.com	hulu.com	fancast	netflix login
general hospital	young and the restless	hulu plus	comcast.net	www.netflix.com
dancing with the stars 2012	survivor	www.hulu.com	fancast xfinity	netflix.com
the bachelor	bold and the beautiful	hulu movies	xfinity tv	netflix
desperate housewives	the young and the restless	hulu tv	comcast tv guide	www.netflix.com/activate
dancing with the stars	the bold and the beautiful	hulu tv shows	fancast	netflix
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*2011 Beta Research Cable Operator Carriage Study, Percent of total cable operators with 100k+ subs very/fairly interested in carrying channel by the end of 2012. Tied for 1st.

Special Q&A

Authentic(ated) Leadership

With TV Everywhere now a clear opportunity for the cable industry, we asked ourselves what companies have been out front since the beginning and have helped push the rest of the industry to follow suit? In our minds, Comcast on the distributor side and Turner on the programming side fits this bill.

So at our May 21 breakfast in Boston, we're bestowing our first TV Everywhere Leadership Award to these companies.

We caught up with Comcast Cable's svp, digital and emerging platforms Matthew Strauss and Turner svp, business development and multi-platform distribution Jeremy Legg to talk about their companies' TVE strategies and how authenticated content is changing the entire industry.



Jeremy Legg



Matt Strauss

Now that TV Everywhere is a reality, what's the next big challenge? What key hurdles remain?

Legg: Our current challenge is rolling out TV Everywhere on devices that the pay TV industry doesn't manufacture. While MVPD's don't make set top boxes, they were essentially built to MVPD's underlying specifications. iPhone, iPad, Xbox, Playstation, Android devices and WebTV are all manufactured outside of the traditional pay TV industry. These devices are created by companies with different business models and technologies, and the pay TV industry must navigate these differences to provide a consistent and easy-to-use consumer experience for pay TV subscribers. It's a unique set of challenges we haven't faced in the past.

Strauss: There are a couple of big challenges. But the first one is probably just consumer awareness, continuing to find ways to let consumers know that authenticated content is available. That's something we continue to make progress on. I think in order to do that, we need to touch upon a lot of different areas—everything from the consistency of the content offering to how easy it is to get authenticated to the seamless nature of the user experience. And all of these things in combination are ways we think will help stimulate customers having a better sense of what's available to them.

What are some key ways programmers and distributors can work together to make TVE more user-friendly?

Strauss: Content consistency. Part of what will be required to make TV Everywhere successful is to create a predictable model in which customers know what they're getting, and to have that consistency across all platforms and devices. It's similar to the early days of on-demand where it was difficult to know why one episode was available from one

series and not another. Over time, we got to a place called "catch-up, keep-up" where we've made all series available, and there are at least 4 of the most recent episodes available at any given time, and the episodes are available shortly after their initial linear exhibition. That same kind of framework needs to get applied across all the different platforms so that customers know the value proposition.

There's been tremendous progress. With the recent deal we did with Disney and Turner, you're starting to see more content parity flowing across these devices and platforms, which I think is critical to fully articulate to customers the value proposition of TV Everywhere.

Legg: Two simple things could have a big impact: (1) Establish a consistent set of iconography and terminology so consumers understand what is and is not authenticated content and, (2) The authentication process can be improved – a successful authentication into one network (e.g. CNN) or MVPD site (e.g. Xfinity) should enable viewing for all programming available within that consumer's linear network package. Don't torture the consumer by making them authenticate so frequently -- this is technologically very much within reach.

What's your view on monetization of TVE?

Legg: Obviously TV Everywhere costs money—from new programming to expanded digital rights to technology infrastructure, and we need to recoup those costs. With that said, I believe the industry needs to think more about building great consumer products. Let's look at the landscape—pay TV subscriber growth is largely flat and total viewing is too—this is when regressive forces begin to tug on the fabric of the industry. We've got great content, but we need to adapt to the consumer's desire to watch that content on devices, which makes us uncomfortable. If we adapt, we'll be fine and the revenue will come.

Strauss: The foundation of the TVE principles were to first give customers the ability and the freedom to consume the content they paid for on any platform or device, but as audiences' viewing moves across these platforms, monetization and measurement will be key components to the ecosystems. There are parallels here to things we've learned with on-demand and that we're now applying to TV Everywhere. For example, on demand we're now generating approximately 400 million views per month. We celebrated our 20 billionth view on demand last year. But there has been very little monetization. That's an area that we're trying to revitalize with the deployment of dynamic ad insertion, which we now have

across our footprint and working closely with Nielsen, which currently measures C3 on our VOD platform. Monetization needs to encompass existing models like C3, but we also need to explore new models that can be more targeted and addressable and that can take advantage of different platforms' unique strengths.

How can advertising to play a bigger role in TVE?

Strauss: If the audience is moving to those different platforms, there is certainly an opportunity to aggregate the audience viewing across screens and monetize. So I do think advertising will be the primary revenue opportunity for TV Everywhere. As for measurement, I think that C3 is clearly critical since it's an industry accepted form of currency. We've worked with Nielsen to measure C3 on VOD and online with Extend Screen, and after months of development we're actually very close to starting a technical test with Nielsen to measure C3 on our Xfinity TV app for iPad. That will be an important piece of moving toward aggregated multiplatform measurement, which for some is the Holy Grail—to be essentially platform-agnostic and have one centralized way to aggregate and roll up all of the eyeballs. That's the goal, but there are a lot of pieces that will need to come together to make sure that happens.

Legg: Measurement is already playing an enormous role in TVE because it has highlighted the divide between digital and linear measurement / ad models. This is literally playing out before our eyes – Nielsen is attempting to move from the TV onto digital platforms, and traditional digital measurement providers are evaluating whether to make the leap to television. Until the industry prioritizes a single currency across platforms, and whether one or more than one measurement company can provide it, I think you'll continue to see a duality in cross-platform content monetization.

Look out 3-5 years. What does the authenticated content world look like in terms of devices, capabilities and consumer usage?

Legg: Today, we think of TV Everywhere as enabling 'mobility,' but in 3-5 years, much of the core video delivery infrastructure for all devices, including televisions, will transition to broadband / IP. We're seeing some of this now with Xbox. This is going to create very different consumer expectations – the things consumers love about broadband such as search, navigation, choice, portability, recommendation and social will become formal expectations across all devices, including televisions. We have to stop thinking about broadband being phones and tablets and not television. I believe this provides us a new opportunity to innovate and create breakthrough products.

Strauss: We're not in the device guessing game. From our point of view, a TV is essentially any piece of glass. A screen that can render video in a secure manner is arguably a TV. If you imagine that world, where video can literally be offered everywhere, from handheld devices to gas stations pumps to the back of a cereal box, we start to move away from just streaming video to what is the experience we're building around the video. Much of this technology is moving us more towards a world of highly personalized experiences. I also think we're going to move from building a relationship with a household to building a relationship with individuals in the household. So think of a much more personalized experience that could be tailored to the viewing needs of each person in the home. Historically, TV was always a very linear and broad experience because that was the technology that was available at the time. But the future is going to be more about mobility, personalization, control and addressability.



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GUEST COLUMNIST

It's How We Connect... And So Much More

By Michael Powell, pres/CEO of NCTA

Over the last year since I joined NCTA, I've given a lot of thought to what exactly defines us as an industry. That's in part because our business is changing so rapidly. But to represent our industry with precision and insight, we need a simple, crisp and clear identity.

A few years ago it might have been easier to describe cable. We were the nation's premier TV provider offering the most diverse lineup of creative and original programming. And we were growing to dominate TV ratings, awards and water-cooler conversation. We still are all those things today.

A few years ago, cable became the nation's leading broadband provider by offering robust high-speed Internet access to the majority of U.S. households and began changing the everyday routine of how we learn, shop, listen to music, apply for jobs, travel, track our finances and much more. And we still are all those things today.

A few years ago, cable's digital voice service became the leading alternative to the phone companies' plain old telephone service, and consumers started saving billions annually on their phone bills.

We still are that today.

So what is the common element that flows through all of these great services that cable offers? It's the vital connection to everything that matters in our lives. Cable is more than TV; it's how we connect. It's your world, your way.

These are themes that you'll see repeated throughout this week's Cable Show and in a new awareness campaign we recently launched on a variety of platforms, from TV, to on-



Michael Powell

line publications to iPad apps. If you are traveling through Washington's Reagan National Airport this month, look for the interactive wall on display in US Airways Terminal C.

We've launched the campaign to serve as a reminder of how cable connects millions of consumers with instant access to unlimited possibilities. When you watch TV while checking your Twitter feed and talking to a friend on the phone, cable is enabling all of that to happen. In today's overstimulated media environment, sometimes we need to take a step back and remember how this amazing ecosystem is thriving.

Cable entrepreneurs have been pushing the boundaries of innovation for years. We started with TV, but also launched the cable modem, and became the first residential broadband provider in the U.S. and America's broadband leader. We brought DVRs to the mass market, made on demand a household phrase and are now providing a variety of content mobility offerings for connected devices.

We didn't claim this mantle by sitting around waiting for others to tell us to act.

We took risks and invested nearly \$200 billion to build a phenomenal platform that is opening up a world of possibilities for consumers.

Cable's services today open the window on a world of possibilities that are an integral, valuable and fun part of our lives. Our services are fast, reliable and at our fingertips, both at home and increasingly on the go.

This isn't an industry waiting for the next big thing, we are trying to create it.

Whether it's connecting all Americans to the Internet, or enabling freedom from the traditional set-top box and living room, cable is creating the future today.

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Wall Street Journal, January 2012

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GUEST COLUMNIST

Women in Cable... Heading in the Right Direction

By Maria E. Brennan, CAE, President & CEO of WICT

As NCTA kicks off the Cable Show in Boston, Women in Cable Telecommunications (WICT) will be recognizing the achievements of the Best Companies for Women in Cable at its Signature Luncheon. People might wonder just what makes these companies so special, and what does gender diversity success look like?

Last year, WICT conducted its PAR Initiative Survey. Participating companies collectively represented 54% of the total cable workforce. Based on those results, 5 operators and 5 programmers stood out. When we study these companies, we begin to understand the impact of gender diversity on their business and their bottom line. The results are apparent. For example, in the case of the top operator, Time Warner Cable, in a four-year period TWC increased its number of women execs by from 18 to 32%. Certainly, this is a demonstrable success borne from their diversity and inclusion practices. Likewise, with the top programmer, 33% of the NBCUniversal Board of Directors are women, and women comprise 51% of their executive/senior-level workforce. Again, this is a testament to the success of superlative diversity tactics.

However, we need to understand what the goal should be in order to have any chance of being successful. McKinsey & Company recently released a new survey undertaken with research partner, *The Wall Street Journal's* Executive Task Force for Women in the Economy. The study looked at 60 Fortune 500 Companies (or companies of similar size) to illustrate what determines gender diversity success. The four key metrics they determined are:

- A starting position that reflects the talent. McKinsey set the bar at the Fortune 500 average share of women accounting for 53% (or more) of entry-level professionals or at women having the same odds of advancing to the manager level as men; 31 companies met or exceeded this metric.

- Better odds of promotion. Based on figures from the top third of survey participants, McKinsey identified companies in which women's chances for advancing from manager to director and then to vice president were at least 85% of men's chances for doing so; 20 companies met or exceeded this standard.



Maria Brennan

- More women at the top. Based on figures from the top third of participants, McKinsey set this metric as having at least 22% female representation on the executive committee; 19 companies met this bar.

- Women in the line. Finally, again based on figures from the top third of participants, McKinsey looked for companies with at least 55% of women vice presidents and senior vice presidents in line positions; 20 companies made this benchmark.

Twenty percent of the companies McKinsey measured are achieving at least three of these benchmarks, while none are meeting all four. Based on the growing body of research that demonstrates how enhanced gender diversity drives business success, it is likely safe to predict that the companies that employ more of these standards will be the most robust of the Fortune 500 companies in years ahead.

In addition to hearing from top PAR Best Companies for Women in Cable at the WICT Signature Luncheon, WICT is also pleased to welcome Iris Bohnet, Ph.D., as she delivers luncheon keynote remarks. She serves as the Academic Dean and Professor of Public Policy at the Harvard Kennedy School and director of their Women and Public Policy Program, and is one of the foremost experts on women's global initiatives.

Between the PAR Initiative, the outside research that WICT gathers and the experts we convene, WICT strives to help companies absorb and enact the collective best practices available. We now have strong metrics that help us identify the goal. We are proud that the cable industry embraces this information and our own PAR survey. At the same time, we challenge the industry to do more. After all, as the research supports, your future success depends on it.

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GUEST COLUMNIST

Be a Mentor: Build Leaders, Build a Legacy

By Ann Carlsen, founder/CEO of Carlsen Resources Inc

As we all reconnect in Boston, seeing so many fresh new faces gets me thinking about our next generation of industry leaders. Many are here—you'll recognize them by their bright smiles, boundless energy, firm handshakes, and their eagerness to absorb everything they encounter... we were all there at one point! Others are holding down the fort back home anxiously awaiting their time to shine. And others, just out of college, are excited to have landed a job in one of the world's most fascinating industries. As the future of cable, I wonder what we can all do to make sure we cultivate this budding talent?

Mentorship. As a mentor, we get to nurture those on the way up while also affording ourselves an opportunity to better ourselves. I facilitated a career panel last fall for The Cable Center's Cable Mavericks Masters Forum—a wonderful program I feel very strongly about. The panel consisted of a diverse group of industry leaders who shared their wisdom with hundreds of eager students. I can tell you it was a deeply rewarding experience for all of us on the panel, and it reminded us how gratifying it is to share hard-won knowledge and see a spark being ignited in someone else.

Much has been written about the value of finding the perfect mentor to guide you at various stages of your career. But there's much less fanfare written about the many benefits—personal and professional—of being a mentor. Consider taking the leap with someone within your own company where the rewards to you and your company are clear. Mentors contribute to their employers' strategic business initiatives, encourage retention thereby reducing turnover costs, and help improve employee happiness and productivity. Developing and promoting talent from within also helps in succession planning. Mentoring is a



Ann Carlsen

terrific way for you to break down organizational silos and contribute to workforce diversity and multiculturalism.

Mentoring a colleague who's not in your direct sphere of influence is a great way to learn more about other areas within your organization and gain potential allies. Working with someone from a different generation keeps you current and relevant and may help you fill a skills-gap you've been meaning to tackle.

And as an executive recruiter, leadership is THE most often requested skill. Mentoring and coaching help grow your management, communication, overall leadership abilities—you'll be enhancing your brand and your resume while supporting your protégé's development.

While all great benefits, let's not forget about the personal rewards. In addition to the satisfaction of giving back to one's professional community, mentors are often energized by the people they counsel, gaining fresh perspective and greater awareness of future possibilities. As anyone with children knows, constantly being asked, "Why?" is mind-expanding. In a professional setting, "Because I said so" doesn't fly. Questioning your own assumptions, challenging the status quo and looking at things through someone else's eyes can be very revealing and often liberating. Not to mention the internal satisfaction that comes from helping build the self-confidence and self-esteem of another.

So, what's holding you back? I often hear "won't this take a lot of time... I'm just so busy?" I won't tell you it doesn't require some effort. But whether you decide to participate in a formal or informal mentoring relationship, I guarantee few experiences are as personally gratifying as helping someone else succeed. As a mentor to aspiring cable leaders, your involvement will spark new ideas for generations to come... and be part of your legacy. It's a gift that keeps on giving—to those you inspire, to your company and industry, and especially to yourself.



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