

CableFAX Daily™

Monday — June 7, 2010

What the Industry Reads First

Volume 21 / No. 108

Britt Bits: Time Warner Cable Chief Offers Industry Views

Rounding out a week that saw **AT&T** move away from unlimited data plans and **Disney's Bob Iger** contend that programmers are in the driver's seat, **Time Warner Cable** chmn/CEO *Glenn Britt* was well spotted to discuss the multichannel business Fri at the **Sanford Bernstein** conference. Add legislative issues such as Title II and debate over the rising costs of media access and the picture of turbulent times in cable is complete. Yet despite it all, Britt said "I'm, if anything, more excited about the future for us than I've been in a long time." Much of Britt's excitement stems from tech opportunities—from wireless networks to new media platforms to home networking. As a proponent of usage-based broadband/data plans, he spoke positively of AT&T's tiered data pricing. "I think it's going to get the industry better aligned with natural consumer behavior than it has been," said Britt. "This has to go in that direction... everything else we buy in our lives works that way." On the plant side, Britt sees hybrid networks as the future, a big reason TWC's ramping its cell backhaul business. "The solution to the congestion you see in some of the wireless networks today is to get that traffic into a wire as fast as you can and use the spectrum for the mobile part, not for the transport part." Of programmers' and consumers' move toward online content, Britt said a dichotomy of sorts is developing. On the one hand, if ops are able to deliver content at any time and place across devices, plus allow consumers to pay for that access via subscriptions and advertising, "that's a really good consumer proposition," said Britt. But if programmers make moves to discount ops' role as content promoter/marketer, a real schism within the industry could develop. "Some programmers... would like to think there's a world where there's [content] packagers other than cable, satellite and the phone companies—maybe even themselves," he said. "If our only value is physical distribution, you can see these industries saying, 'we don't want to be a retailer anymore.'" 1 of the key detriments to consumers from the potentially divergent goals of ops and programmers is price elevation, yet Britt isn't concerned about legislative intervention—yet. "It could be an issue in the future if the prices go up too fast," he said. "If the costs get too high, smaller packages might be a good thing... I do think consumers would like a little more choice."

Comcast-NBCU: It's no secret *Kevin Martin's* law firm has been lobbying for clients against a **Comcast-NBCU** transaction, but things step up a notch Mon when the former **FCC** chmn is slated to testify in CA at a House Judiciary field hearing on the merger. He'll be representing **Bloomberg**, which paid his firm **Patton Boggs** \$70K in 1Q for lobbying.

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CableFAX PROGRAM AWARDS

Deadline: June 4, 2010

More Information:

www.cablefaxprogramawards.com

From the most outstanding cable programs to the best surprise ending, the annual CableFAX Program Awards honor the best in cable programming content and people. Now is your chance to win a CableFAX Program Award and get recognized for bringing value to your viewers. The winners and honorable mentions will be saluted during an awards luncheon in October 2010 in New York City.

Enter as many categories as you like but please tailor your entry to the category you are entering.

Platinum/People Categories:

- Best Actor in Cable
- Best Actress in Cable
- Best Cable Program
- Best New Cable Program
- Best Producer
- Best Writer
- Best Director
- Hall of Fame: Open to actors, writers, directors and producers for a body of work

By Genre: Best Show or Series In The Following Genre

- Animals/Nature
- Animated

- Children's
- Comedy
- Documentary
- Drama
- Education/Instructional
- Family Friendly
- Faith Based/Religious
- Fitness/Health
- Food
- Music
- News
- Public Affairs
- Reality/Game Show
- Sci Fi
- Sports

- Talk Shows
- Best Regional Program
- Other: enter your best in a genre not mentioned above

By Genre: Best Actor/Actress/Host In The Following Genres

- Animals/Nature
- Comedy
- Drama
- Family Friendly
- Food
- Music
- News/Public Affairs
- Reality/Game Show
- Sports

- Talk Shows
- Best Regional Program
- Other: enter your best in a genre not mentioned above

Special Categories:

- Best Opening Sequence
- Best Surprise Ending

Tech Categories:

- Best Online/Mobile Extras for a Linear Show
- Best Online-Only/Mobile-Only Show
- Best Video on Demand Program/Special

Compiling Your Entry (Visit www.cablefaxprogramawards.com for full details)

What to Send

At the beginning of your two page synopsis, include the following information for all categories:

- Category entered • Title of entry • Key contact for entry • Organization submitting entry

Supporting Materials

- Video of Program on DVD • Clippings • Photos

How To Enter: Use this form or visit www.cablefaxprogramawards.com for additional category information and to enter online.

Mary Lou French
CableFAX Program Awards
Access Intelligence
4 Choke Cherry Rd, 2nd Floor
Rockville, MD 20850

Deadline: June 4, 2010
Late Deadline: June 11, 2010
Event: October 2010

Entry From (All information required)

Title of Entry/Name of Entrant (as you'd like it to appear on your award if selected): _____

Company and/or Client: _____

Contact Name of person submitting entry Job Title: _____

Address: _____

City: _____ State: _____ Zip: _____

Telephone of Contact: _____ Fax of Contact: _____

Email Address (Required): _____

Entry Fees

- Primary entry: \$300 each \$300 each \$ _____
 - Secondary entry of same campaign** into one or more categories: \$175 each \$175 each \$ _____
 - Late entry fee: \$175 per entry \$175 each \$ _____
(for entries sent between June 5, 2010 and June 11, 2010)
- Total \$ _____

The late entry fee must be applied to each individual entry postmarked after February 5, 2010.

* Payment in full must accompany the entry.

** If entering more than one category, please submit separate entry forms.

Payment Options

- Check (payable to Access Intelligence/CableFAX) Money Order
- Mastercard Visa Discover American Express

Credit Card # _____

Exp. _____

Print name of card holder _____

Signature _____

Entry fees are not refundable.

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www.cablefaxprogramawards.com

The awards are presented by the most trusted information source in cable: CableFAX Daily and sister brand CableFAX: The Magazine.

Questions? Contact Awards Coordinator Rebecca Stortstrom at 301-354-1610; rebecca@accessintel.com.

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Bloomberg TV competes against **CNBC**. Merger opponents **CWA** and the **FACT Coalition** each paid Patton Boggs \$20K for lobbying in 1Q, according to disclosure forms. Martin, who oversees the firm's tech & comm practice, is slated to appear on the 1st panel along with Comcast and NBCU reps, **Greenlining Institute's Samuel Kang**, **Stan Washington** of the **Natl Coalition of African American Owned Media**, **CWA's Jim Weitkamp**, **Natl Hispanic Media Coalition** pres/CEO **Alex Nogales** and law prof **Allen Hammond**. A 2nd panel will be made up of producers, writers, dirs and programmers, including dir and former **BET** pres **Reginald Hudlin**, **TV One/Radio One's Alfred Liggins** and **Kathryn Galan**, exec dir of the **Natl Assoc of Latino Independent Producers**. Members of Congress scheduled to participate include Judiciary chmn **John Conyers** (D-MI), field hearing pusher **Maxine Waters** (D-CA) and Rep **James Sensenbrenner** (R-WI).

Retrans Play: The **NFL** has broadcast's back when it comes to retrans consent. "The NFL is committed to broadcast television, and believes that today's retransmission consent process is fair and helps support broadcasters' ability to invest in quality programming," the League wrote in reply comments due Thurs on the **FCC's** inquiry into whether it should change retrans rules. That surely can't help NFL Net gain carriage with **Time Warner Cable** and **Cablevision**, 2 of those leading the charge at the FCC for retrans reform. The NFL cares about the issue because broadcasters need dough to televise a full schedule of NFL games. This was the 1st time NFL had weighed in on the petition, which asks the FCC to consider arbitration and continued carriage during negotiations. **ACA** continues to push for an FCC investigation into the impact of sharing agreements, duopolies and joint negotiations—suggesting this year's quadrennial review of media ownership rules would be the perfect place to do it. **NAB** reiterated it's "nothing to see here" stance, saying market-based negotiations are working just fine. Time Warner Cable noted that not a single public interest group filed comments supporting NAB's position (**Public Knowledge** and others are supporting TWC's call for change).

Free HD: It didn't take long for **DirecTV** to counter **DISH's** free HD for life promotion (**Cfax**, 6/4) with one of its own. It's good for 6 weeks and available only to new customers who take the "Choice" package or above and sign up for auto bill pay. DTV says its offer is better than DISH's (surprise!) because it doesn't require pre-payment for services. **BTIG** analyst **Richard Greenfield** said the offerings shouldn't hit cable ops too hard. "The impact on cable operators should be relatively muted, as they already promoted free HD," wrote Greenfield. "That being said, it's hard to see competitor price cuts/promotions as anything but a negative for the multichannel industry." Greenfield cited **Time Warner Cable's** active marketing slogan "Home of Free HD" as evidence of cable's lead in the space, and TWC chmn/CEO **Glenn Britt** on Fri downplayed any lasting impact from the DBS ops' new plans. "We have a very competitive product...and we're better at marketing," said Britt, adding that competitively, TWC "is roughly at a standstill with satellite companies."

In the States: **LIN TV** and **ACME Comm** entered into a pact whereby LIN will provide technical, engineering, promotional, administrative and other operational support services to ACME stations in Albuquerque-Santa Fe, Dayton and Green Bay-Appleton from its own local stations. LIN will also provide ad sales services in the latter 2 markets.

Online: The Online Safety and Technology Working Group, formed last May by **NTIA**, submitted its report on protecting kids in the 21st Century Fri to Congress and NTIA. Recommendations include a Web-based clearinghouse that would make youth-risk and social media research available to all involved with online safety education, coordinated federal govt educational efforts, establishment of industry best practices and promotion of instruction in digital media literacy and computer security in pre K-12. **NCTA** fully supports the call for more education and promotion of existing online safety tools.

Ratings: The Wed night premiere of "Curb Your Enthusiasm" on **TV Guide Net** delivered 1.2mln total viewers, an 80% YOY increase in HH viewership and healthy gains across females 18-34 (+290%), 18-49 (+165%) and 25-54 (+257%). -- **TBS'** original comedy "Are We There Yet?" debuted Wed with 3.2mln total viewers and 1.6mln 18-49s, and the successive ep garnered more than 3.3mln viewers and 1.7mln 18-49s to rank as ad-supported cable's top sitcom telecasts this year.

Honors: It may not be every programmer's favorite campaign, but **Time Warner Cable's** "Roll Over or Get Tough" won a **Public Relations Society of America** Silver Anvil in the Integrated Communications category. Watch to see if TWC dusts off rolloverorgettough.com for **Disney-ESPN** negotiations. Agencies **Ketchum** and **Purple Strategies** worked with TWC.

People: One of cable's most astute programming execs is back full time. Former **Discovery** vet Dan Salerno is joining **BBC Worldwide Channels** as vp, programming for Latin America and the US Hispanic market. He'd been consulting to BBC and a range of programmers since falling victim to one of Silver Spring's large restructurings in '05 (**Cfax** 9/25/05).

CableFAX Week in Review

Company	Ticker	6/04 Close	1-Week % Chg	YTD %Chg
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BROADCASTERS/DBS/MMDS

DIRECTV:	DTV	37.90	0.56%	13.65%
DISH:	DISH	20.34	(2.42%)	(2.05%)
DISNEY:	DIS	33.69	0.81%	4.47%
GE:	GE	15.71	(4.32%)	3.83%
NEWS CORP:	NWS	14.76	(3.91%)	(7.29%)

MSOS

CABLEVISION:	CVC	24.80	(0.04%)	(3.95%)
COMCAST:	CMCSA	17.79	(1.66%)	5.52%
COMCAST SPCL:	CMCSK	16.85	(2.15%)	5.25%
GCI:	GNCMA	5.99	4.54%	(6.11%)
KNOLOGY:	KNOL	11.50	(3.85%)	5.31%
LIBERTY CAPITAL:	LCAPA	40.45	(3.84%)	69.37%
LIBERTY GLOBAL:	LBTYA	25.03	(2.98%)	14.34%
LIBERTY INT:	LINTA	12.81	(1.21%)	18.20%
MEDIACOM:	MCCC	6.27	17.64%	40.27%
RCN:	RCNI	14.45	(0.55%)	33.18%
SHAW COMM:	SJR	18.08	(0.99%)	(12.11%)
TIME WARNER CABLE:	TWC	53.87	(1.57%)	30.15%
VIRGIN MEDIA:	VMED	16.08	(0.5%)	(4.46%)
WASH POST:	WPO	449.63	(3.46%)	2.28%

PROGRAMMING

CBS:	CBS	13.93	(4.33%)	(0.85%)
CROWN:	CRWN	1.75	(0.57%)	20.69%
DISCOVERY:	DISCA	36.95	(1.89%)	20.48%
GRUPO TELEVISIA:	TV	18.04	(2.96%)	(13.1%)
HSN:	HSNI	24.62	(8.65%)	21.94%
INTERACTIVE CORP:	IACI	22.97	(2.05%)	12.16%
LIBERTY:	L	31.60	(2.8%)	(13.07%)
LIBERTY STARZ:	LSTZA	51.67	(1.24%)	11.96%
LIONSGATE:	LGF	7.04	3.53%	21.17%
LODGENET:	LNET	4.85	(8.83%)	(12.3%)
NEW FRONTIER:	NOOF	1.82	0.00%	(3.7%)
OUTDOOR:	OUTD	5.40	(9.24%)	(6.9%)
PLAYBOY:	PLA	3.53	(6.86%)	10.31%
SCRIPPS INT:	SNI	44.73	2.78%	7.78%
TIME WARNER:	TWX	30.46	(1.71%)	4.53%
VALUEVISION:	VVTV	1.79	(20.44%)	(62.71%)
VIACOM:	VIA	35.92	(2.87%)	14.03%
WWE:	WWE	16.29	(1.69%)	6.26%

TECHNOLOGY

ADC:	ADCT	7.51	(9.08%)	20.93%
ADVANTAGE:	AEY	2.80	0.36%	42.13%
ALCATEL LUCENT:	ALU	2.50	(2.72%)	(24.7%)
AMDOCS:	DOX	27.61	(3.12%)	(3.22%)
AMPHENOL:	APH	40.79	(3.8%)	(11.67%)
AOL:	AOL	21.28	3.15%	(8.59%)
APPLE:	AAPL	255.97	(0.36%)	21.47%
ARRIS GROUP:	ARRS	10.50	(4.28%)	(8.14%)
AVID TECH:	AVID	13.15	(2.45%)	3.06%
BIGBAND:	BBND	2.90	1.75%	(15.7%)
BLNDER TONGUE:	BDR	1.33	2.32%	16.68%
BROADCOM:	BRCM	33.59	2.82%	6.74%
CISCO:	CSCO	22.95	(0.89%)	(4.11%)
CLEARWIRE:	CLWR	7.96	(2.21%)	17.75%

Company	Ticker	6/04 Close	1-Week % Chg	YTD %Chg
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COMMSCOPE:	CTV	25.92	(8.09%)	(2.3%)
CONCURRENT:	CCUR	5.16	(4.44%)	30.30%
CONVERGYS:	CVG	10.37	(5.04%)	(3.53%)
CSG SYSTEMS:	CSGS	19.59	(4.53%)	2.62%
ECHOSTAR:	SATS	20.56	(2.23%)	2.09%
GOOGLE:	GOOG	498.72	2.70%	(19.56%)
HARMONIC:	HLIT	5.51	(4.84%)	(12.82%)
INTEL:	INTC	20.95	(2.22%)	2.67%
JDSU:	JDSU	10.62	(7.65%)	28.73%
LEVEL 3:	LVLTL	1.26	(5.97%)	(17.65%)
MICROSOFT:	MSFT	25.79	(0.04%)	(15.39%)
MOTOROLA:	MOT	6.70	(2.15%)	(13.63%)
PHILIPS:	PHG	28.62	(4.02%)	(2.79%)
RENTRAK:	RENT	22.66	(3.82%)	28.24%
SEACHANGE:	SEAC	7.76	(7.04%)	18.33%
SONY:	SNE	29.24	(5%)	0.83%
SPRINT NEXTEL:	S	4.78	(6.82%)	30.60%
THOMAS & BETTS:	TNB	37.97	(0.97%)	6.09%
TIVO:	TIVO	8.35	(7.63%)	(17.98%)
TOLLGRADE:	TLGD	6.62	4.25%	8.35%
UNIVERSAL ELEC:	UEIC	18.85	(3.43%)	(18.82%)
VONAGE:	VG	1.92	(4.48%)	37.14%
YAHOO:	YHOO	15.00	(2.22%)	(10.61%)

TELCOS

AT&T:	T	24.17	(0.53%)	(13.77%)
QWEST:	Q	5.21	(0.57%)	23.75%
VERIZON:	VZ	27.21	(1.13%)	(17.87%)

MARKET INDICES

DOW:	DJI	9931.97	(2.02%)	(4.76%)
NASDAQ:	IXIC	2219.17	(1.68%)	(2.2%)

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. MEDIACOM:	6.27	17.64%
2. GCI:	5.99	4.54%
3. TOLLGRADE:	6.62	4.25%
4. LIONSGATE:	7.04	3.53%
5. AOL:	21.28	3.15%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. RHI:	0.00	(100%)
2. VALUEVISION:	1.79	(20.44%)
3. OUTDOOR:	5.40	(9.24%)
4. ADC:	7.51	(9.08%)
5. LODGENET:	4.85	(8.83%)

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