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Thursday — June 16, 2011

What the Industry Reads First

Volume 22 / No. 115

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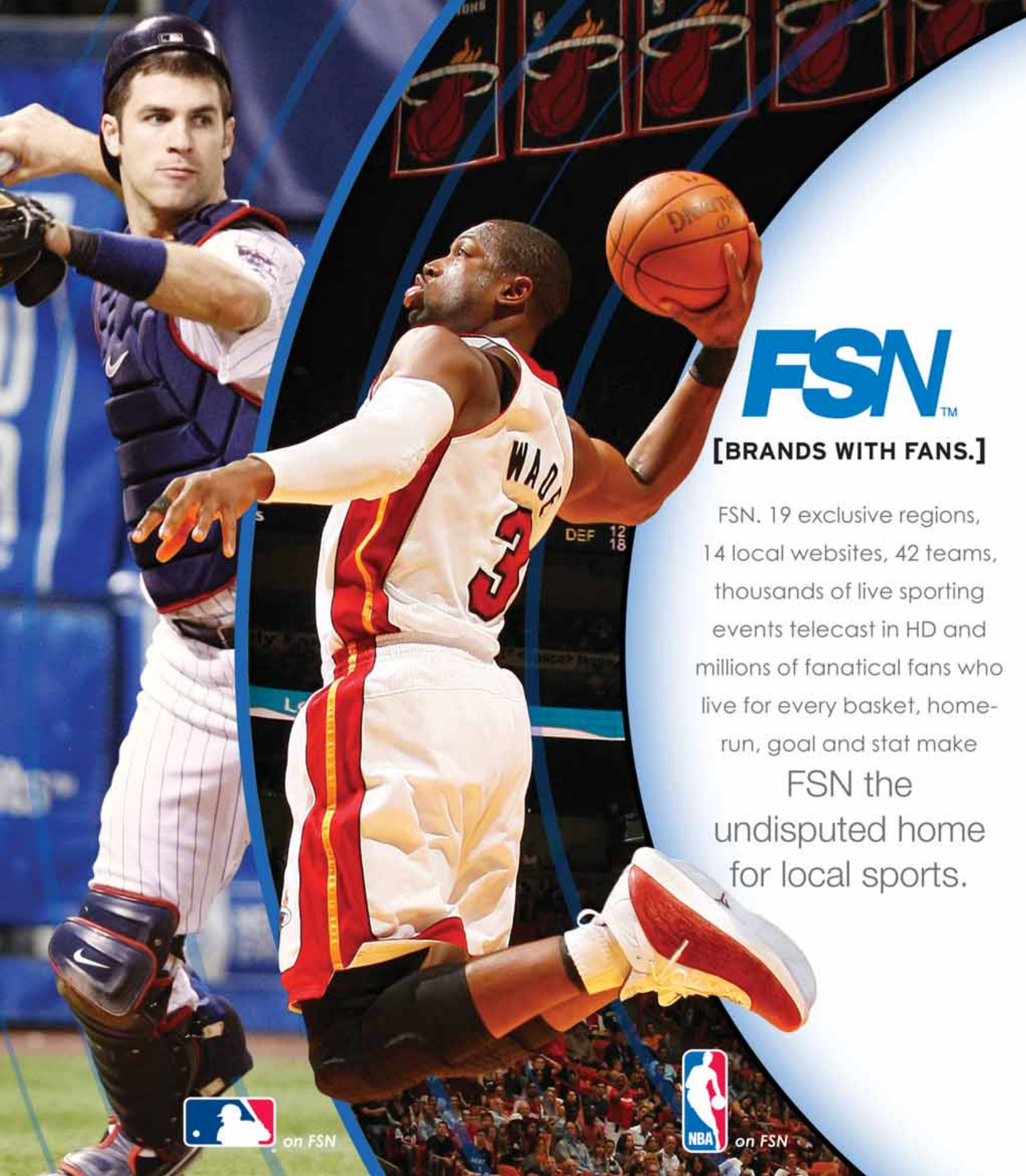
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## Possibilities: Cable Touts Technologies, Opportunities

Cable's upfront take is poised to better broadcast's, its broadband product remains a market leader and the worst of the recession is in the rearview mirror. For these and other reasons the industry's feeling pretty good right now. Yet telling is **The Cable Show's** motto that cable represents "everything possible" and not simply "everything." Indeed, where technology is concerned, particularly TV Everywhere, most believe the possibilities must be embraced and launched now—and quickly. In offering his view of the iPad, **Insight** vice chmn/CEO *Michael Willner* underscored that view. "It's a cable service... consumers expect it to be that way," he said. "We're either on the train or we're not." The train may be out of the station thanks to tech advancements from players such as **Comcast**, **ESPN** and **HBO**, but its travel has been hampered by rights disagreements between ops and programmers. **Scripps Nets** chmn/CEO *Ken Lowe* said the industry must try to work out the costs issues, that it "can't continue to tap into the consumer" for rev growth when viewers see the value proposition offered by multi-screen initiatives as a key benefit. **Time Warner Cable** continues to view TV Everywhere as "critical" to cable going forward, said pres/COO *Robert Marcus*, who believes devices that are well advanced of traditional set tops such as the iPads must be tapped for growth. "You've got to have a great product and a great business model," said **Fox Networks** group pres/COO *David Haslingden*. Yet at a critical juncture when the stakes are highest, cable lacks a universally agreed upon business model for a tech crazy world. Some Wall St analysts argue that cable's video product lacks vibrancy because of dilatory tech rollouts, a deficiency that appears to be affecting 2 primary stakeholders: Subs because many are gravitating toward Web-centric models such as **Netflix**; investors because video defections make it difficult for cable ops to deliver sustainable and meaningful rev growth. "When you have a decelerating top line, there's no dream to believe in," said **Citigroup's** *Jason Bazinet*. To beef up its hipness, cable also needs to "articulate the user interface," said **Deutsche Bank Securities' Doug Mitchelson**, echoing a common sentiment that cable must continue to innovate on several fronts. After all, analysts contend that cable programmers will soon offer full channel access through online services that have far more digital operating expertise than cable currently does. Even so, confidence is running high. "The five-year outlook is really exciting if [cable] can take advantage of what's happening with technology," said **Morgan Stanley's Ben Swinburne**. "It's our game to win,"



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said Lowe. Possibly.

**Legislative Issues:** FCC chmn *Julius Genachowski* continued to beat the drum for broadband adoption, announcing plans to launch a new task force to promote adoption while citing **Cox** and **Comcast** as particular leaders in this regard. Still, “we need to step it up a few notches,” he said, noting how cable—which impressively covers 93% of the US with broadband—also has “a positive role to play in the wireless competition space.” **HBO Go** and **Cablevision’s** WiFi network provide good examples of mobile innovation, which is absolutely required to address consumer demand but must also be planned for by freeing up additional spectrum, he said. On Tues, both **Senate Commerce** cmte sr adviser *Danny Sepulveda* and **House Commerce** cmte majority staff chief counsel *Neil Fried* said spectrum is 1 of the most critical issues on the Hill. Productive bi-partisan discussions are ongoing for a House bill promoting additional spectrum use, said Fried, noting current work on an incentive auction piece. Sepulveda said to expect some movement on the related, recently marked up Senate bill by the end of summer, or “certainly before September 11.” Sepulveda expects significant FCC action this summer on USF reform, which plays a role in broadbanding America. The distribution of funds will likely be addressed 1st, he said, because collections is a much thornier issue. Fried remains “cautiously optimistic” that reform will happen, and believes FCC commish *Michael Copps* “would like to get [it] done before he leaves” at the end of the year. At another Cable Show panel, however, FCC officials hinted that those hoping for USF reform by late summer may have to wait until the fall. But don’t worry, it shouldn’t screw up Thanksgiving. “I’m really just talking about a month or two delay,” cautioned *Sherrese Smith*, legal adviser to Genachowski. At a public policy lunch, FCC commish *Mignon Clyburn* was a bit more optimistic on timing—but not much—predicting a USF order by “August with a small ‘a,’” and then adding: “Everyone recognizes that we can not stay on the same path... We’re going to have to make some hard decisions... Before the leaves turn, I anticipate we will see something.”

**Playing Sports:** The “cost of good content will not go down,” said **NBCU** pres, networks distribution *Bridget Baker*, speaking mainly of sports programming that aggregates large numbers of viewers and plays extremely well live. The Olympics have the added benefit of attracting a good portion of female eyeballs, she said, and throw in an expanded net stable and **Comcast** is “extremely well positioned” to turn a profit on the ‘14-’20 Games. Sports content is clearly “a good place to be” because it “busts the DVR,” said **Fox Networks Group** pres, affil sales and marketing *Mike Hopkins*. **Turner Network Sales** COO *Coleman Breland* lauded the genre’s promotion of multi-screen engagement by viewers, with immediacy the catalyst. Yet despite that and other positive attributes, **Time Warner Cable** evp/chief programming officer *Melinda Witmer* said “sports doesn’t have an afterlife,” meaning limited monetization windows. As such, with sports pricing on a hefty upswing it could become tricky for programmers to juggle the genre

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with original ent content, which also attracts viewers but could cut into the dollars reaped by sports. Since less than 32-33% of cable subs watch sports, **Charter** svp, programming *Allan Singer* wonders how long it will take before industry economics demand a la carte sports offerings. Moreover, obtaining the multi-platform rights to sports and all other programming isn't yet an easy task. Fox looks to clear programming rights across devices, said Hopkins, but the process "takes some time and money." Still, "we'll get there in time and I bet everyone else will as well," he said.

**Deals:** **DISH** made a \$1.38bln bid for **Terrestar**, which has been in bankruptcy since Oct. Any deal would need court approval. The bidding deadline for the satellite telecom company has been set for June 27, with the auction scheduled for June 30. "We believe a potential acquisition of Terrestar is a positive for DISH as the additional spectrum provides DISH much more wireless optionality (owning more contiguous spectrum increases what you can do with it) going forward and is a smart and strategic use of cash, especially post **Tivo** litigation," said **Wells Fargo's** *Marci Ryvicker* in a note to clients.

**Carriage:** **Universal Sports** tied up a multi-year, multi-platform distribution deal with **DirecTV**—the 1st such agreement between the 2 companies. The net plans to launch on a free preview basis to all customers by early Aug before moving to DirecTV's Sports Pack and other select packages on Oct 1. The deal includes access to supplemental live Internet streams of events not aired on the linear net. -- **CBS Sports Net** recently launched in HD and SD on **Comcast** systems in Miami, Charleston, SC, and Savannah, GA, and is now more widely available on Comcast's Digital Preferred tier in several markets, including Philly and Seattle. -- **Sportsman Channel HD** is set to launch in **Comcast** Chicago on June 22. With the launch, Sportsman HD has grown by 53% since the start of the year.

**Talking Business:** There remains plenty of room for growth in the business services markets, a panel of MSO execs agreed during a Wed **Cable Show** panel. Opportunities exist for traditional and future products across the spectrum of customers, they said. **Cox** intends to double its market share in the next 6 years in the low-end small business market, said *Phil Meeks*, svp, Cox Business. "Bandwidth is still king," so we're finding there's still a demand for traditional modems and associated products, said *Craig Collins*, svp, business services sales and marketing, **Time Warner Cable**. Yet the flip side is that retention is important, said *Jim McGann*, corp vp, **Charter Business**. "We can lose customers as fast as we acquired them" if we don't meet their needs, he said. To prevent this, Charter contacts customers 3x each year to see how they're doing, he said. "Remember, they're our customers because they were dissatisfied with their previous provider." Discipline, a solid network and customer service are critical to meet customer needs, he said. Meeks noted the ILECs are "big but they're not dumb," they won't stand by and watch cable scoop up their customers. Besides traditional products, the MSO reps mentioned data storage, cloud services, trunking, IBX and managed app services as examples of future services they plan for the business market. They agreed higher speeds are critical as are DOCSIS 3.0 rollouts. All stressed wireless services will be important for business services.

**5Qs with Bryan Burns, ESPN vp strategic business Planning and Development:** When we spoke about 3D one year ago many were predicting it would catch on as fast or faster than HD did. That's not been the case. I'm going to steal a line from someone who lives close to you in DC and that person is none other than Alan Greenspan. He spoke



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some years ago about the economy having an irrational exuberance. I think that's what happened to the 3D business about a year ago. When we launched, "Avatar" was very big and a lot of folks thought this was going to fly very far, very fast. We didn't particularly think that, we just needed to get going. **So where are we now?** We're in a situation now where we're starting to see lots of clues that this business has a realistic opportunity. And these are clues we didn't have a year ago. Some of them are humorous. What sorts of clues? We live in the Hartford market. There's a Hartford TV station, the NBC O&O, which has 3D Doppler weather radar. They don't always show it, but every night they say, "3D Weather," which I find funny. So people are starting to grab the vernacular about 3D faster than they did with HD. You know we have HD paint, HD cosmetics, HD wax for your car. Those were clues to us back then that it had caught on. 3D is just starting to catch on now. There are also business clues. Shipments of 3D sets from wholesalers to retailers are going to go 5-fold this year over 2010. On a macro view we are finding consumer replacement cycles are shrinking. We're all buying TVs faster than we used to. People are fascinated with flat screens, and since prices have come down they'll go ahead and buy that new TV... and the price gap has come down considerably. If you'll recall, 8 or 9 years ago, the price gap between HD and SD was huge... You can now buy a 43-inch 3D TV for \$699 online, free shipping. You can buy a 32-inch 3D TV at Wal-Mart for under \$500. The average 3D plasma cost has come down by over \$1700. The average LCD price has shrunk by \$178. We didn't see that kind of pricing for HD for a long time. That's a big clue. **What about screens on the shelves?** With HD, I would go into a Wal-Mart store in Guilford, CT, and look on the shelves to see how many HD vs SD sets. At first, 8-9 years ago, they had 5 HD and 55 SD. Then it became 10 and 50; 20 and 40; 30 and 30 etc. That took 6-7 years. The percentage of screens that will be on the shelves that are going to be 3D is going to go up quickly, very dramatically over the next 6, 7, 8 months. That's the first step, to get the sets on the shelves in front of you at retail. 14 months ago there were 19 3D sets out there; in March '11 the number was 68. This is happening very quickly. Studios will release more than 100 3D Blue Ray titles this year. I recently bought a 3D Blue Ray player for \$178. All these things are clues. "Glee" is on tour; it's going to shoot some of its tour in 3D. In Stat estimates there will be 100 3D channels worldwide by '15. **But there are hurdles.** Yes. Nearly 40% of consumers say they are confused by 3D technology...so all is not totally well. But that was true at this stage with HD. We feel we are farther along with 3D than we were with HD one year after launch.

**Show Notebook:** Even while blazing, the cable ad market—like the industry as a whole—remains beset by difficulties in capitalizing on a multi-screen world. "Measurement is not keeping up with technology... it needs to," said **MediaVest USA** CEO *Bill Tucker*. By making content monetization difficult, the problem is even hampering quick rollout of TV Everywhere initiatives, said **Insight** vice chmn/CEO **Michael Willner**. "There needs to be aggressive acceptance of new ways to measure," he said. Said **Horizon Media** pres/CEO *Bill Koenigsberg*: "We need to know who is [watching] what [and where], but we also need a common currency to trade on." Beyond measurement, problematic is that some companies still don't have ad buyers/sellers working across screens, but rather tied to single platforms, said **The Weather Channel** evp, ad sales *Beth Lawrence*. -- While there are hurdles, execs heading international programming operations agreed during a panel that there's considerable growth opportunity. "We see [growth] everywhere," said *Hernan Lopez*, pres/COO, **Fox International**

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**Channels.** **Disney Channels Worldwide** pres *Carolina Lightcap* noted challenges market to market. India generally has 1 TV per household and adults make viewing decisions. As a result, Disney must take that into account when making programming choices. Cultural mores also influence Disney program content, she said. **Discovery Networks Intl** pres/COO *Mark Hollinger* is "being cautious about" the Internet's influence on linear viewing overseas. "We feel it will vary from market to market," he said. -- Alluding to the **FCC's** AllVid proceeding, *Sherrese Smith*, legal adviser to FCC chmn *Julius Genachowski*, said she's "heartened" by cable's progress in enabling 3rd-party devices, noting that some new device prototypes will come out in the next few days. Indeed, Smith hinted that the future of the AllVid proceeding could hinge on how aggressively cable enables the market for commercially available cable-enabled devices. "If things aren't moving quickly enough, we'll need to see what government's role should be," she said.

**Adoption Issues:** FCC chmn *Julius Genachowski's* pet project broadband adoption was the subject of a panel at "The Park," the amphitheater-like venue on the show floor. "Though broadband is available to 90 percent of country, it's only used by 67 percent," Genachowski told the crowd before the panel began. He said it's important to have "a focused discussion about private sector and community efforts that will move the needle on broadband adoptions quickly." *Lee Schroeder*, **Cablevision's** svp, govt & public affairs, emphasized the need for communicating the value of broadband to lower-income populations. "If people don't understand value, they're not moved to adopt it," he said. Panelists cited 3 necessary components to public/private broadband adoption programs: fair price point, communicating relevance to the targeted communities and strategic partnerships. *Ben Romo* is exec dir of **Partners in Education**, which has partnered with **Cox** to bring broadband service and refurbished computers to 4th, 5th and 6th graders in Santa Barbara. Romo noted that the key for replication of these kinds of programs is involving business. "There's no way the government would lead a program like this," he said. "It took business standing up. Cox said, 'we will provide this key linchpin.'" Also key, he said, is providing a school-based component, which will give teachers the skills to incorporate the program in the classroom. "The approach must be comprehensive and have community-wide support," said Romo. *Brett Wilkes*, national dir of **League of United Latin American Citizens**, which has partnered with **Time Warner Cable**, emphasized targeting communities directly. "To be effective, it's got to be done in those communities. Approach them in way that's relevant to them," Wilkes said. With the help of a \$200K grant from TWC, the program targets locations that had existing social programs dealing with issues facing US Hispanics. "80% of the Latino community are non-adopters," he said, so ultimately, to reach the FCC Chairman's goal of adopting another 100 million people, public/private partnerships are the way to go.

**5Qs with Hub pres/CEO Margaret Loesch:** **How do you think you're doing at moving the ratings needle?** I think we're trending in the right direction. We have a ways to go. On a really good day, our top delivering program may get 250K viewers, whereas Nickelodeon on an average day will get a million viewers. But we're trending in the right direction. We're over double what Discovery Kids was delivering. In our past 2 weeks, The Hub kids' total day has exceeded

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Discovery Kids with triple digit gains. Kids 2-11 and 6-11 even higher. If the trends weren't all positive, I'd be nervous. **Viacom's Philippe Dauman recently commented that The Hub isn't having any impact on the marketplace. How do you respond and what's the message you have for advertisers?** First of all, Nickelodeon's doing a great job. They're doing very well in their ability to capture revenue. Having said that, Philippe is not in the same room we're in when we talk to advertisers. Advertisers are so delighted to have a new kid on the block that can provide value. Clearly they appreciate Nickelodeon's reach, but they also have to respond to Nickelodeon's very tough requirements and tactics. We're extremely solutions oriented, unlike the larger companies we don't go in and demand everything we want. Instead, we ask advertisers what are your needs. How can we be a solutions-based provider for you? We do many integrated marketing campaigns. He may not feel we've had any impact, but the advertisers have a different perspective. When I read his quote, I chuckled. I've always loved being underestimated. I love being the underdog because we can experiment, we can think out of the box, we can be nimble—and we are. From an advertising perspective, we were completely sold out last year and we're well on our way to being sold out this year. **Are you where you thought you'd be since launching in Oct?** Yes. I'm not so sure the parent companies thought we'd be where we are. They had a very aggressive plan, but they're happy and supportive and here's why. We had studied the competition and where they were when they launched. Nicktoons and Disney XD were both unrated for a couple years. We had to be rated out of the gate. And when they were rated, they had slow growth... We know the cable industry. We know it takes time. We're trending in a very positive way. **What are some of the things that are doing the best for you?** Co-viewing has been very successful. From a percentage basis, we're #1 in co-viewing, and that was part of our strategy. All of our original programming—"Haunting Hour," "My Little Pony," "Transformers," and so forth—are doing the best. That's very encouraging. **Do you have more originals in the works?** Yes. We're currently in production of 2nd seasons for all of our shows. In a couple weeks, I'll be able to tell you about a few more acquisitions. We have 9 or 10 new original series in the works, including "Aquabats," an existing pop band with a cultish following with kids and adults. We also have a show called "Majors and Minors." We are in the process of selecting 12 kids who will be mentored by top musical talent. It's not a true competition show. It's really about storytelling.

**Hall of Fame Highlights:** Kudos to the **Cable Center** for running a classy event Tues night as 6 Hall of Fame honorees looked back over their careers and gave the cable community a better understanding of their contributions. Whether it was inductee *Maria Bartiromo* recounting how then-**CNN** business news chief *Lou Dobbs* told her she was making the biggest mistake of her life when she bolted for **CNBC** (it wasn't) or fellow inductee *Rocco Commisso* reminding the crowd that he's now the most indebted cable guy to the tune of more than \$3bln after taking **Mediacom** private, the evening mixed poignancy and humor to remind us all how much the industry comes down to its people. Inductee *Jeff Bewkes* of **Time Warner Inc** gave some ironic but brilliant leadership advice when he emphasized the importance of "following your people" in order to lead them. Other inductees like *Jim Gray*, former vice chmn of **Time Warner Cable**; *Paul Kagan*, chmn/CEO of **PK WorldMedia**; and former Sen *Tim Worth*, now pres of the **United Nations Foundation**, all remembered the many mentors and industry legends who gave them opportunities, and helped them advance and

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# BUSINESS & FINANCE

contribute. One interesting addition this year: The awarding of the 1st William J. Bresnan Ethics in Business Award to **Bright House Networks** chmn *Bob Miron*. It was appropriate—both in terms of its namesake and its deserving 1st recipient—as the country climbs out of the recent economic meltdown and slew of financial scandals. Meanwhile, hosts *Giuliana* and *Bill Rancic* of reality TV fame kept things moving well, and the Cable Center can be proud of another night to honor the people that built (and continue to build) this industry.

**On the Hill:** The **House Communications** subcmte has scheduled a hearing for June 22 titled “Reforming FCC Process.” A witness list hasn’t been announced yet.

**People:** **nuvoTV**, **SiTV**’s new name come July 4, has hired *Randall Lewis* as vp, biz and legal affairs.

**On the Circuit:** **SCTE** and Tuck Executive Education at Dartmouth set the 2nd SCTE-Tuck Exec Leadership program for Apr 30-May 5. Geared to rising and established execs, the program earned 4.98 out of a 5 rating in a survey of attendees last year.

**Business/Finance:** Cablevision subsidiary **Rainbow National Services** announced the commencement of a cash tender offer on its outstanding 10 3/8% sr subordinated notes due ’14. The offer is in connection with the previously announced leverage spin-off of **AMC Nets**.

## CableFAX Daily Stockwatch

Company	06/15 Close	1-Day Ch	Company	06/15 Close	1-Day Ch
BROADCASTERS/DBS/MMDS			BLNDER TONGUE:.....1.85 .....(0.01)		
DIRECTV:.....	46.86	.....(0.3)	BROADCOM:.....	32.14	.....(1.02)
DISH:.....	27.80	.....(0.33)	CISCO:.....	14.84	.....(0.24)
DISNEY:.....	38.39	.....(0.2)	CLEARWIRE:.....	3.84	UNCH
GE:.....	18.39	.....(0.21)	CONCURRENT:.....	5.80	.....(0.05)
NEWS CORP:.....	16.80	.....(0.3)	CONVERGYS:.....	12.50	.....(0.17)
MSOS			CSG SYSTEMS:.....	17.90	.....(0.12)
CABLEVISION:.....	36.02	.....(0.4)	ECHOSTAR:.....	32.39	.....0.30
CHARTER:.....	55.70	.....(0.26)	GOOGLE:.....	502.95	.....(5.42)
COMCAST:.....	23.46	.....(0.47)	HARMONIC:.....	6.83	.....(0.08)
COMCAST SPCL:.....	22.17	.....(0.42)	INTEL:.....	21.42	.....(0.4)
GCI:.....	11.37	.....(0.04)	JDSU:.....	16.53	.....(0.67)
KNOLOGY:.....	14.33	UNCH	LEVEL 3:.....	2.19	.....(0.04)
LIBERTY CAPITAL:.....	79.42	.....(1.26)	MICROSOFT:.....	23.74	.....(0.48)
LIBERTY GLOBAL:.....	39.85	.....(1.4)	MOTOROLA MOBILITY:.....	23.95	.....(0.08)
LIBERTY INT:.....	16.20	.....(0.54)	RENTRAK:.....	17.48	.....(1.46)
SHAW COMM:.....	21.01	.....(0.19)	SEACHANGE:.....	10.35	.....(0.26)
TIME WARNER CABLE:.....	73.88	.....(1.12)	SONY:.....	24.88	.....(0.32)
VIRGIN MEDIA:.....	31.33	.....(0.34)	SPRINT NEXTEL:.....	5.31	.....(0.02)
WASH POST:.....	415.54	.....(6.17)	THOMAS & BETTS:.....	49.99	.....(0.87)
PROGRAMMING			TIVO:.....	9.98	.....(0.34)
CBS:.....	25.70	.....(0.51)	UNIVERSAL ELEC:.....	24.83	.....(0.1)
CROWN:.....	1.70	.....(0.1)	VONAGE:.....	4.12	.....(0.13)
DISCOVERY:.....	39.78	.....(0.7)	YAHOO:.....	14.81	.....(0.39)
GRUPO TELEVISA:.....	22.91	.....(0.28)	TELCOS		
HSN:.....	31.30	.....(0.57)	AT&T:.....	30.35	.....(0.44)
INTERACTIVE CORP:.....	35.26	.....(0.19)	VERIZON:.....	35.12	.....(0.46)
LIBERTY:.....	40.30	.....(0.73)	MARKET INDICES		
LIBERTY STARZ:.....	75.00	.....(0.37)	DOW:.....	11897.27	....(178.84)
LIONSGATE:.....	6.14	.....(0.07)	NASDAQ:.....	2631.46	.....(47.26)
LODGENET:.....	3.14	.....(0.03)	S&P 500:.....	1265.42	.....(22.45)
NEW FRONTIER:.....	1.34	.....0.01			
OUTDOOR:.....	5.97	.....(0.03)			
SCRIPPS INT:.....	45.85	.....(0.48)			
TIME WARNER:.....	34.62	.....(0.42)			
VALUEVISION:.....	7.53	.....(0.32)			
VIACOM:.....	55.26	.....(0.6)			
WWE:.....	9.25	.....(0.05)			
TECHNOLOGY					
ADDVANTAGE:.....	2.47	.....(0.06)			
ALCATEL LUCENT:.....	5.18	.....(0.22)			
AMDOCS:.....	28.91	.....(0.24)			
AMPHENOL:.....	50.72	.....(0.58)			
AOL:.....	19.97	.....(0.15)			
APPLE:.....	326.75	.....(5.69)			
ARRIS GROUP:.....	10.54	.....(0.22)			
AVID TECH:.....	17.32	.....(0.22)			
BIGBAND:.....	2.07	.....(0.05)			

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Bruce Jenkins, SportsIllustrated.com - May 24, 2011

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- Tennis Channel ranked #1 among all cable networks during the Nadal vs. Murray semifinal.
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TC Source: Nielsen/Arianna, HH Coverage Area Rating in the 48 metered markets for which Tennis Channel is reportable, live+same day.

\* Unduplicated cumulative viewing, minimum of 6 minutes viewing, based on historical relationship of average audience to cumulative audience for Tennis Channel.



[tennischannel.com](http://tennischannel.com)

## GUEST COLUMNIST

### A Moving Story...

We're a nation on the move. According to the U.S. Census Bureau, 15 percent of households move in a typical year. Moving means an introduction to new schools, new neighbors, a new favorite pizza parlor waiting to be happened upon, and many more life changes.

The good news for our industry is that each time people move, there's an immediate opportunity to win customers. The bad news is that each time people move, there's an equally immediate opportunity to lose customers. So since 2002, cable has been working to shift the balance in its favor. Under the auspices of CTAM, cable companies have done a very good job of helping customers who are moving find the cable company in their area by introducing them to resources like the Cable Mover Hotline and cabled-over.com. This process involves everything from an automated call processing center with sophisticated call routing logic and a serviceability database, to a national consumer website. And of course, some serious marketing and PR!

It's worked well. But we learned there's more we can do. Recently, a committee of cable marketing professionals challenged the CTAM Mover team to devise an even more powerful approach to keeping and capturing customers when they move. Those results have been truly impressive. Now CTAM's mover team is amped up to be more focused on the tactical execution of its programs.

So how are we generating more leads while reducing our costs-per-lead? It's fair to say we're engaging in high-level strategizing, coupled with powerful on-the-ground tactics.

Among the efforts:

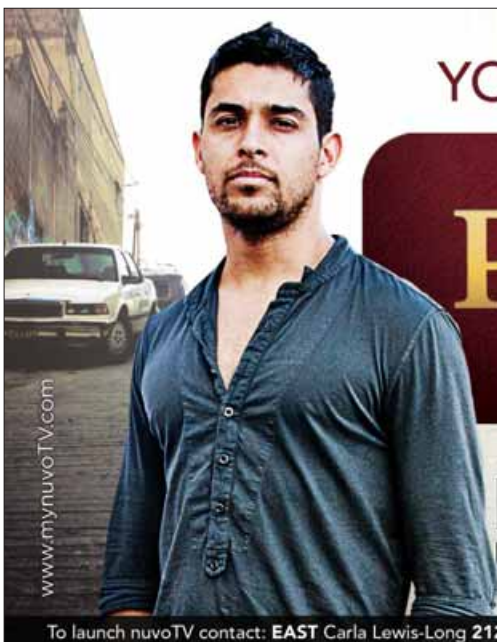
- Participating in the USPS Change of Address marketing program in key markets and regions.
- Online expansion: We're enhancing our current national consumer-facing website by adding a lot of new content including tips and resources for movers, through a new partnership with Scripps' frontdoor.com. We've also introduced a Spanish-language derivation of the site. The site is rapidly emerging as a key resource for movers across the country.
- Rapid sharing of results: Direct marketing is a game in which subtle variations can produce significant impact. Each time we test a new message or identify a promising creative approach, we consolidate the findings and share them with our members. Our goal is to accelerate the pace of learning to maximize our efforts.

These are just some of the approaches that are contributing to a higher lead volume at attractive per-lead costs. They're testaments to CTAM's ability to spearhead nationally prominent marketing initiatives that accomplish what no single company could achieve on its own. It's why we think we're now beating the competition when it comes to attracting new mover households. The customer can be as loyal as they are fickle. And 40 percent of people who move actually change their brand of toothpaste when they move. So it's critical that cable be there when customers are making these decisions. Thanks to CTAM, we are.

*(Sam Howe, is the Chief Marketing Officer for Time Warner Cable and CTAM chair).*



Sam Howe



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Q: What network group is the  
**most trusted and family friendly?**

Q: What network group is a  
**leader in original content?**

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