

# CableFAX Daily™

Wednesday — June 25, 2008

What the Industry Reads First

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## Philly Bound: Let's Get Ready to Expo

With SCTE's Cable-Tec Expo underway this week, we chatted up SCTE pres/CEO John Clark about what to look out for in the City of Brotherly Love. **Obviously, everyone's talking about HD, tru2way and a host of other tech issues. What will be the hot topic at the 25th Cable-Tec Expo?** The broadcast digital transition. This is the last major cable event until that occurs. We're doing our workshops on preparing for the broadcast digital transition twice. We think they will be particularly crowded. Our CTO panel kind of ties into that, with **PBS CTO John McCoskey** on the panel. We've not had a broadcast CTO on there before. And we also have **Dr Roger Blakeway, SCTE Europe pres**, on the panel to talk about surprises, do's and don'ts from when they went through the digital transition. **With DOCSIS 3.0 rolling out, what are some of the engineering challenges that will be discussed at the show. Or is this a done deal on the tech side and now more of a marketing issue for MSOs?** I think it's still an open issue. Tru2way, OpenCable, however you want to phrase it, that's always going to be a work in progress. One thing that is particularly unique now, both here at Expo and in our standard work, is the interest on targeted advertising. **How's attendance looking?** We're running slightly ahead of last year's 10,700 attendees. We have over 400 total exhibitors and 80 first-time exhibitors. Even with consolidation, we're running slightly ahead. Another significant difference this year, there is clearly an influx of Asian exhibitors. **How will the move to the fall under the Cable Connects consolidation plan impact the show next year? Will there be any collaboration with CTAM Summit?** We think with change comes opportunity. The buzzword I've heard the most is "linkage." We'll be linking the marketers and the technology people who need to work together, but we're on an identical 3-day schedule in Denver as we are in Philly. **Have you got into specifics? If you register for 1 Cable Connects event, will you have access to others?** That is all—in very large letters—a work in progress. We're 16 months out. Our focus is on getting through Expo this year. July 1, when there's a new dawn, will shift into that.

**Ad Trial Nixed:** Charter announced Tues that it will not move forward with an online advertising trial in which it would have sold info on sites visited by customers to ad firm **NebuAd (Cfax, 5/18)**. While Charter said the service received favorable feedback in focus groups, customers raised questions about it after the MSO notified subs of plans to launch the pilot in 4 communities last month (San Luis Obispo, CA; Fort Worth, TX; Oxford, MA; and Newton, CT). "As such, we are not moving forward with the pilots at this time. We will continue to take a thoughtful, deliberate approach with the goal to ultimately structure an advertising service that enhances the Internet experience for our customers and addresses questions and concerns they've raised," Charter said Tues. **WOW, Broadstripe, Embarq** and others have relationships with NebuAd. Charter's move drew immediate praise from House Telecom chmn **Ed Markey (D-MA)**, who, along with ranking member **Joe Barton (R-TX)**, recently discussed privacy concerns



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with Charter. "I urge other broadband companies considering similar user profiling programs to similarly hold off on implementation while these important privacy concerns can be addressed," Markey said.

**A&E Elevation:** Robert DeBitetto was promoted to pres, gm of **A&E** and **Bio Channel**. He'll report to **AETN** pres/CEO Abbe Raven and be responsible for content across the 2 nets as well as **Crime & Investigation** and brand extensions. DeBitetto has served as evp, gm for A&E since '05.

**On the Hill:** Sen Herb Kohl (D-WI) wrote **FCC** chmn Kevin Martin this week, asking him to strengthen program access rules to encourage carriage of independent programming channels. Indie programmers contend that program access rules "are ineffective as currently applied because program carriage complaints lack timetables, take years to adjudicate, and are governed by uncertain standards," he wrote. Kohl wants the FCC to set a deadline for resolving complaints; provide a "more certain" definition as to what constitutes discrimination; and provide a procedure for staying adverse action by a distributor against an independent programmer (such as, for example, moving the independent programmer's channel to a disfavored or costly tier) while that independent programmer's discrimination complaint is being adjudicated. -- The House approved Senate-modified legislation Mon that will require incumbent Bells to interconnect 911 and e911 calls from VoIP providers.

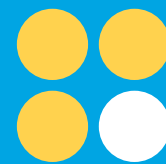
**DTV Doings:** The **Better Business Bureau** is warning consumers about what it's calling a "misleading" converter box ad campaign from OH-based **Universal TechTronics**. While the ads promote free digital converters, the BBB says the firm is peddling "5-year warranties" for \$59 that must be purchased with each box. Add shipping and handling and each box costs nearly \$100. The BBB says it believes that these are the same boxes consumers could buy in electronics retail stores across the country using \$40 govt coupons that make the total cost to consumers about \$20/box. The ads also imply that consumers will receive similar services as cable or DBS customers without the bills.

**Competition:** **AT&T** unveiled a suite of content delivery and digital media solutions to help companies package, deliver and distribute video and rich multimedia Web content to TVs, computers and mobile devices. The telco has inked strategic agreements with software firms **ExtendMedia**, **Qumu** and **Stratacache** for the initiative, and plans to complete deployment of nearly \$70mln in supporting network infrastructure and development investment by year-end across the US, Europe, Japan, Hong Kong, China and Taiwan.

**In the States:** **Pace** is the latest digital TV equipment vendor to join **MoCA**, the Multimedia over Coax Alliance. The industry driven initiative promotes distribution of digital video and entertainment through existing coax in the home. -- **Discovery Comm** inked a deal to sell programs and series from its family of networks on DVD at more than 2.5K participating **Blockbuster** stores across the country. The store will carry approx 36 Discovery titles, including **Discovery Channel's** "Dirty Jobs," **Animal Planet's** "Meerkat Manor" and **TLC's** "Best of Little People Big World."

**Expo Notebook:** In conjunction with its 25th anniversary, **SCTE's Cable-Tec Expo** is going green. The amount of physical paper at Expo has been reduced by 2.3mln pages from last year to this year, SCTE pres/CEO John Clark said. It also features environmentally friendly paper and ink, and recycling bins on the floor. -- **Philip Hoffman**, **Cox** manager, technical training and consulting, won this year's SCTE Excellence in cable Telecommunications Learning & Development Award. -- **Concurrent** unveiled the "Real Time Pitcher 2000," which uses resilient, real-time content distribution to

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ensure no loss of video captures due to network or component failures. Concurrent says it boasts a success rate of up to 99.99%. -- **Motorola** announced its expanded Broadband Access Network portfolio, which is aimed at allowing MSOs to drive fiber closer to the home while protecting their infrastructure investment and minimizing cost. Moto also said it has achieved PacketCable 1.5 certification for the "SURFboard SBV6220" digital voice modem.

**Comcast Elected:** Comcast has been named the **Democratic Natl Convention's** official cable TV and VOD provider, and will produce online streaming coverage of the convention in Spanish at **DemConvention.com**, marking the 1st time a natl political convention has been completely simulcast in Spanish. The MSO will also edit, manage and archive convention coverage for distribution online, on cable and via global satellite uplink; and make available on demand convention content such as key speeches and highlights.

**Advertising:** A partnership with **TiVo** enables ad research system developer **TRA** to license and market **TiVo Audience Research Metrics** as a bundled offering with its **Media TRAnalytics**. TRA will draw anonymous viewing data from TiVo's base of 1.7mln stand-alone subs, allowing for a national sample size in order to effectively evaluate ROI of media spend. -- Advertising on multiple platforms results in a significant increase in a campaign's conversion rate, or the percentage of consumers who actually purchase the product or service being advertised, according to **Integrated Media Measurement**. For example, consumers exposed to TV ads for 4 tracked cable shows had an avg conversion rate of 4.35%, while consumers exposed to ads on TV plus at least 1 other platform had an avg conversion rate of 12.38%.

**VOD:** Cablevision has added **Versus on Demand** and **Golf Channel on Demand** to its FOD lineup.

**Mobile:** Travel Channel has launched in beta a free mobile travel app providing access to the net's destination content through any Web-enabled mobile device. The service covers more than 10mln points of interest and more than 2K content references exclusive to Travel Channel.

**Beta:** Satellite subs are much happier with their service than are cable customers, according to **Beta's** satellite subscribership survey. 71% are very satisfied with their service and 68% say they would definitely continue their subscription. By contrast, Beta's cable subscriber study this past fall showed corresponding percentages of 62% and 45%. **Discovery** ranked #1 in the satellite subscribership survey, with 70% of respondents rating the net important to the enjoyment of satellite TV. **History** (59%) and **ESPN** (53%) complete the top 3 major nets. Top mid-sized and emerging nets: **Nat Geo** (49%), **Fox Movie Channel** (38%), **Biography** (32%) and **Lifetime Movie Net** (32%).

**Ratings:** **Disney Channel's** "Camp Rock" (5.6/5.35mln) joined a Lakers-Spurs playoff game on **TNT** in posting the best cable HH rating since a **MSNBC** presidential debate back in Feb. The original movie, which also scored well on **ABC**, helped the net gain a clear 2nd position in prime. **USA** (2.3/2.21mln) earned the top spot with the help of originals "Law & Order: Criminal Intent" (3.6/3.5mln) and "In Plain Sight" (3.6/3.45mln), and **TNT** (1.7/1.66mln) took 3rd through horsepower from its consistent **NASCAR** content. **Nick at Nite** (1.3/1.28mln), **Lifetime** (1.3/1.27mln) and **Fox News** (1.3/1.24mln) tied for 4th. **Brag Book:** The premiere of **Nat Geo's** "The Girl with Eight Limbs" earned a 1.7/1.15mln, good for a 385% increase in the HH rating compared to the net's 7-11pm avg from Jun '07 and ranking as the net's 2nd-highest 1-hour premiere ever.

**Programming:** The House and Senate have designated Sept as "Gospel Music Heritage Month" after members teamed up with **Gospel Music Channel** to launch the initiative. -- New **TLC** series "Rock the Reception" (Jul 15) follows 2 engaged couples as they rehearse a professionally-choreographed production number as their surprise first dance at their wedding reception. -- **Justin Timberlake** will host **ESPN's** "The 2008 ESPYs," joining presenters such as **Lance Armstrong**, **David Beckham** and **Jason Bateman**. -- Actor **Ewan McGregor** travels through African



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\* Source: Simmons National Consumer Study Fall 2005 vs. Fall 2007. Read: "The number of Adults 55+ who have a cable modem at home has grown +45% in the last 2 years, while Adults 18-54 show only 24% growth in this area."



# BUSINESS & FINANCE

countries such as Egypt and Kenya in **Fox Reality's** original series "Long Way Down" (Aug 2).

**Milestone:** After achieving membership growth every year since '04, **WICT** has achieved this an all-time membership high of 7K.

**Honors:** Congrats to **Time Warner Cable Media Sales' Tiffany Celli** and **Judy Rettinger**, who were named to the **American Women in Radio and Television's** list of "25 Women Who Rule in Sales and Marketing." -- **SCTE** bestowed **Cox's Philip Hoffman** with its Excellence in Cable Telecommunications Learning & Development Award.

**Public Affairs:** **Music Choice** is rolling out its 1st pro-social campaign, teaming with non-profit **Rock the Vote**. "Live Your Vote" is aimed at driving youth voter registration and will include PSAs and special content (themed music videos, originals, hosted playlists, etc) for the VOD net and broadband music service. **Time Warner Cable's** NYC region teamed up to film a "Live Your Vote" video playlist hosted by Latin artist **Tito El Bambino** that will air in Sept.

**People:** **Fox Soccer Channel** promoted **Mike Petruzzi** to vp, ad sales. -- **RGB Networks** appointed **Charles Corbalis** vp, engineering.

**Business/Finance:** **Concurrent's** board has authorized the repurchase of up to \$2.5mln of the company's common stock.

## CableFAX Daily Stockwatch

Company	06/24 Close	1-Day Ch	Company	06/24 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
BRITISH SKY:	38.63	(0.41)	APPLE:	173.25	0.09
DIRECTV:	25.88	(1.05)	ARRIS GROUP:	8.75	(0.26)
DISNEY:	32.22	(0.17)	AVID TECH:	18.51	(0.01)
ECHOSTAR:	29.35	(0.36)	BIGBAND:	5.49	(0.15)
GE:	27.59	0.19	BLNDER TONGUE:	1.21	(0.06)
HEARST-ARGYLE:	19.66	(0.02)	BROADCOM:	27.39	0.40
ION MEDIA:	1.45	0.00	C-COR:	11.00	0.00
NEWS CORP:	16.52	(0.01)	CISCO:	24.48	(0.07)
<b>MSOS</b>					
CABLEVISION:	23.30	(0.3)	COMMScope:	52.99	(0.93)
CHARTER:	1.15	(0.1)	CONCURRENT:	0.61	0.02
COMCAST:	18.98	(0.17)	CONVERGYS:	15.17	(0.11)
COMCAST SPCL:	18.76	(0.19)	CSG SYSTEMS:	11.16	(0.11)
GCI:	7.48	(0.32)	ECHOSTAR HOLDING:	32.10	(0.9)
KNOLOGY:	12.54	(0.52)	GOOGLE:	542.30	(2.91)
LIBERTY CAPITAL:	15.00	0.00	HARMONIC:	9.84	(0.15)
LIBERTY ENTERTAINMENT:	24.67	(1.33)	JDSU:	11.78	0.03
LIBERTY GLOBAL:	31.39	(0.24)	LEVEL 3:	3.33	0.04
LIBERTY INTERACTIVE:	15.85	(0.12)	MICROSOFT:	27.73	(0.24)
MEDIACOM:	5.19	(0.32)	MOTOROLA:	7.35	(0.09)
SHAW COMM:	19.02	(0.06)	NDS:	51.40	(0.75)
TIME WARNER CABLE:	26.61	0.45	NORTEL:	9.00	0.02
VIRGIN MEDIA:	13.80	(0.48)	OPENTV:	1.33	(0.02)
WASH POST:	577.26	5.11	PHILIPS:	34.75	(0.25)
<b>PROGRAMMING</b>					
CBS:	19.66	(0.16)	RENTRAK:	14.06	0.00
CROWN:	4.24	(0.28)	SEACHANGE:	7.45	0.01
DISCOVERY:	23.42	(0.26)	SONY:	45.79	(0.77)
EW SCRIPPS:	43.74	(0.51)	SPRINT NEXTEL:	8.11	0.39
GRUPO TELEvisa:	23.82	0.38	THOMAS & BETTS:	37.67	(0.96)
INTERACTIVE CORP:	19.83	(0.41)	TIVO:	6.50	(0.24)
LIBERTY:	49.00	0.20	TOLLGRADE:	5.23	(0.27)
LODGENET:	5.70	(0.03)	UNIVERSAL ELEC:	23.50	(1.01)
NEW FRONTIER:	3.96	0.07	VONAGE:	1.71	(0.04)
OUTDOOR:	7.46	(0.12)	WORLDGATE:	0.30	0.00
PLAYBOY:	5.07	(0.04)	YAHOO:	22.04	0.59
TIME WARNER:	14.60	(0.02)	<b>TELCOS</b>		
VALUEVISION:	3.96	(0.23)	AT&T:	34.30	(0.08)
VIACOM:	31.20	1.02	QWEST:	3.90	0.05
WWE:	15.25	(0.11)	VERIZON:	35.41	(0.5)
<b>TECHNOLOGY</b>					
3COM:	2.37	(0.02)	<b>MARKET INDICES</b>		
ADC:	16.21	(0.76)	DOW:	11807.43	(34.93)
ADDVANTAGE:	3.10	(0.04)	NASDAQ:	2368.28	(17.46)
ALCATEL LUCENT:	6.09	(0.04)			
AMDOCS:	30.02	(0.39)			
AMPHENOL:	47.68	(0.93)			

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