

# CableFAX Daily™

Wednesday — August 15, 2007

What the Industry Reads First

Volume 18 / No. 158

## Quint-Play? Home Security Ringing Cables' Bells

Everything old is new again? For years, there's been talk and some interest in MSOs launching home security offerings. Some have even done it. But Tues' announcement from **Time Warner Cable** that it had hired someone for the new post of vp, home security and monitoring, product management seems to signal a renewed interest in the potential revenue generator. Time Warner's not a stranger to home security. It has launched the service in some divisions, but now it's looking to make improvements and roll the product out to other markets. TW brought in 20-year cable vet *Judith Allen* for the gig. Allen most recently operated her own consulting firm, but she previously did stints at **MediaOne**, **Century Comm** and **USA Network**. Operators' interest in delving into home security has grown in recent months as they look for new rev opportunities (such as wireless), and as growth slows for data and video. Plus, the technology has improved. A home security session at last week's **CableLabs** Summer Conference was reportedly well attended, and startup **4HomeMedia** was a popular presenter at the forum's "Innovation Showcase," according to CableLabs execs. 4Home, which picked up a "Best of Innovations" award at **CES**, demo'd a 4-screen interface that lets users manage security from their TVs, mobile phones, PCs or touch panels. Several home security vendors also exhibited at **CableNET** at May's Cable Show, including **Alarm.com**, **NextAlarm.com** and **uControl**. TW's understandably tight-lipped on home security plans at this point. "Time Warner Cable has had a successful but modest presence in home security for over 15 years," said *Peter Stern*, evp, product management, Time Warner Cable. "Technological advances now make it possible for Time Warner Cable to offer even more compelling home security services, and I can think of no better person to lead our expansion in this area than Judi Allen, with her experience and exceptional track record in the cable industry."

**Cut!:** **ReelzChannel TV** announced that pres *Rod Perth* has resigned. Company pres/COO *Gary Thorne* will immediately absorb the responsibilities of Perth, who will transition to a new consultant/advisor role through early Sept. "This is about rebalancing my life both personally and professionally, and it is an ideal transition point for everyone," said Perth.

**Competition:** Enhancements to **DirecTV's** "NFL Sunday Ticket" package this season include an expanded alliance with **Kangaroo TV** for in-stadium game viewing via a handheld device. Reliant Stadium in Houston and Qwest Field in Seattle will offer the tech this year, in addition to returns to Dolphin Stadium in Miami and FedEx Field in D.C., where we tested the service last season. DirecTV has also lowered the price to access brilliant displays of action and myriad stats—from \$40 to \$25 for a single game or 8 games for \$150 (\$120 for season ticket holders and DirecTV subs).

**Local Cable:** In a deal solidified by recent board votes, the town of Mooresville, NC, will pay approx \$75mIn for the local 10K-sub cable system formerly owned by **Adelphia** and recently operated by **Time Warner Cable**. The system also covers subs in nearby towns Davidson and Cornelius, and an independent board was appointed by the 3

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communities to oversee the operations. Said a Time Warner Cable spokesperson: "We anticipated the decision and will be proceeding to separate the system over the next few months."

**Mobile:** The Weather Channel Interactive is the 1st company to secure from consortium dotMobi the rights to a .mobi domain (Weather.mobi) for mobile Internet access. dotMobi backers include Microsoft, T-Mobile and Vodafone.

**In the States:** Comcast launched HSD and VoIP service in the Houston region; VOD will follow in the coming months. -- Both Time Warner Cable (Fri-Sun) and Comcast (Fri-Aug 26) will kick off free previews of Fox Soccer Channel. This weekend's window includes the net's opening-week coverage of England's Barclay's Premier League, while Aug 22 will feature 3 intl friendlies, including the US-Sweden match. -- Charter added automotive shopping net driverTV to its on demand lineup.

**Deals:** Travel Channel forged an exclusive pact with Tele Atlas allowing for the use of net content for location-based and navigation apps using Tele Atlas digital maps (think in-car GPS systems). The net is providing hundreds of travel-related points of interest from its Destination On Demand Library, and the content will mirror TV formats while featuring audio content from talent such as John Ratzenberger.

**Trademark Fun:** While waiting to find out just what Rupert has in store for his Fox Business Network, we got impatient and started trolling the trademark filings. Late last month, Fox filed trademarks for a few names for a series of TV segments featuring business info. The names: Fox Business Hard Data Bank, Fox Business Hot Data Bank, Fox Business Hard Data Wing, Fox Business Hot Data Wing and Fox Business HD Wing. Well, at least we know they got data...

**Ratings:** As HBO closed the door on disappointing series "John from Cincinnati" after 1 season, TNT's "The Closer" (5.8/5.52mln) continued to repel aspirants to the weekly prime telecast throne for the 8th straight week. But the show wasn't able to help TNT (1.9/1.77mln, 3rd) overtake Disney (2.4/2.33mln), which took the prime banner for the 5th consecutive week. USA (2.3/2.13mln) landed in 2nd, TBS (1.3/1.24) was 4th and Hallmark (1.3/1.07mln) took 5th. -- **Brag Book:** A Sun ep of The History Channel's "Ice Road Truckers" earned an impressive 2.7/2.3mln while attracting 3.9mln viewers. It was preceded by 2 previous eps of the show.

**Programming:** GSN will honor the life of Merv Griffin with a pair of 5-hr marathons this weekend (Sat & Sun, 10am-3pm ET) featuring Griffin TV appearances and classic "Jeopardy" eps. -- Now in production is The N's 1st scripted comedy, "About A Girl." 13 eps tracks a college sophomore as she moves in with 4 guys. -- Big Ten Net will bounce 64 of the conference's 99 regular season men's hoops games to fans starting Jan 2, and will also feature 3 conference tourney tilts.

**JT Mania:** HBO is running full-throttle in its multi-platform promotion of Justin Timberlake's concert event "Futuresex/Loveshow" (Sept 3). Components include related content on HBO On Demand in HD (Comcast, Cox, Charter and Suddenlink), a U-G promotion at Futuresexlove.com and interactive experiences at Second Life.

**Marketing:** More than 1K video entries were submitted on Comcast's Ziddio.com for WWE's "Are You WWE's Biggest Fan?" contest from May 18-July 31. The stunt notched more than 785K page views. 15 finalists will be flown to NYC later this month where a panel of WWE judges, including Stone Cold Steve Austin, will vote on their videos.

**On the Circuit:** Cable Positive launches a blog Wed, with pres/CEO Steve Villano updating the site at least once a

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# BUSINESS & FINANCE

week (<http://cablepositive.blogspot.com/>). It will feature the latest news in the fight against AIDS/HIV.

**Advertising:** Ad distributor **Millenia 3** signed on to use **Teletrax**' digital video monitoring and tracking service, which provides market and measurement data. Millenia's clients include **Disney** and **Turner**.

**Intl:** The **Africa Channel** inked a carriage deal with **Sky**, a multi-channel TV platform in the UK and Ireland.

**People:** **MTVN** promoted **Kelleigh Dulany** to vp, public responsibility, **Comedy Central** and **Spike**. -- Acting **Nat Geo** gm **Steve Schiffman** was elected a **CTAM** board member.

**Business/Finance:** **Pali** analyst **Rich Greenfield** is questioning **CVC**'s forecasts as the **Dolan** family works toward ratifying its \$36/share privatization bid. "We find it all too convenient that management is lowering forecasts in the midst of the market/sector volatility and only five weeks after their last proxy filing that made no mention of a more difficult operating environment," wrote Greenfield. He argues that independent members of the MSO's board should explain to shareholders some inconsistencies in guidance and FCF projections, and surging working capital numbers. **CVC** declined to comment on **Pali**'s note. **CVC** shares closed Tues at \$33.07, down slightly.

## CableFAX Daily Stockwatch

Company	08/14 Close	1-Day Ch	Company	08/14 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
BROADCASTERS/DBS/			AMPHENOL:	34.94	(0.29)
BRITISH SKY:	53.50	(0.34)	APPLE:	124.03	(3.76)
DIRECTV:	22.10	(0.33)	ARRIS GROUP:	14.53	(0.63)
DISNEY:	32.36	(0.88)	AVID TECH:	31.27	(0.62)
ECHOSTAR:	39.15	(0.87)	BIGBAND:	9.23	(0.68)
GE:	37.68	(0.49)	BROADCOM:	34.44	(0.6)
HEARST-ARGYLE:	20.20	(0.46)	C-COR:	12.74	(0.5)
ION MEDIA:	1.39	(0.01)	CISCO:	30.26	(0.57)
NEWS CORP:	21.48	(0.82)	COMMSCOPE:	51.00	(1.59)
TRIBUNE:	25.28	(0.49)	CONCURRENT:	1.43	0.00
<b>MSOS</b>					
CABLEVISION:	33.07	(0.03)	CONVERGYS:	17.79	0.15
CHARTER:	2.66	(0.1)	CSG SYSTEMS:	22.44	(0.32)
COMCAST:	25.50	(0.26)	GEMSTAR TVG:	5.48	(0.03)
COMCAST SPCL:	25.38	(0.32)	GOOGLE:	508.60	(6.9)
GCI:	12.55	0.22	HARMONIC:	8.58	(0.19)
KNOLOGY:	14.76	(0.08)	JDSU:	13.96	(0.26)
LIBERTY CAPITAL:	113.65	(0.1)	LEVEL 3:	5.07	(0.22)
LIBERTY GLOBAL:	41.87	(0.08)	MICROSOFT:	28.27	(0.26)
LIBERTY INTERACTIVE:	19.04	(0.57)	MOTOROLA:	16.51	(0.34)
MEDIACOM:	7.98	(0.02)	NDS:	48.46	(1.16)
NTL:	28.22	0.00	NORTEL:	19.38	0.21
ROGERS COMM:	42.97	0.00	OPENTV:	1.43	0.10
SHAW COMM:	21.51	(0.7)	PHILIPS:	37.82	(0.46)
TIME WARNER CABLE:	35.42	0.07	RENTRAK:	12.18	(0.43)
WASH POST:	791.31	(1.16)	SEACHANGE:	6.27	(0.21)
<b>PROGRAMMING</b>					
CBS:	29.81	(1.23)	SONY:	47.10	(1.3)
CROWN:	6.80	0.26	SPRINT NEXTEL:	18.71	(0.78)
DISCOVERY:	24.23	(0.15)	THOMAS & BETTS:	55.60	(0.9)
EW SCRIPPS:	39.93	(0.51)	TIVO:	5.78	(0.12)
GRUPO TELEVISA:	23.78	(0.91)	TOLLGRADE:	9.76	(0.35)
INTERACTIVE CORP:	27.84	(0.13)	UNIVERSAL ELEC:	27.86	(1.2)
LODGENET:	26.26	(1.1)	VONAGE:	2.16	(0.12)
NEW FRONTIER:	6.18	(0.27)	VYYO:	5.95	0.18
OUTDOOR:	8.79	(0.27)	WORLDGATE:	0.36	(0.03)
PLAYBOY:	10.70	(0.22)	YAHOO:	23.72	(0.85)
TIME WARNER:	18.19	(0.61)	<b>TELCOS</b>		
UNIVISION:	36.23	0.00	AT&T:	38.26	(0.82)
VALUEVISION:	8.32	(0.4)	QWEST:	8.55	0.05
VIACOM:	37.97	(0.08)	VERIZON:	40.96	(0.69)
WWE:	14.06	(0.44)	<b>MARKET INDICES</b>		
<b>TECHNOLOGY</b>					
3COM:	3.57	(0.14)	DOW:	13028.92	(207.61)
ADC:	16.92	(0.19)	NASDAQ:	2499.12	(43.12)
ADVANTAGE:	5.94	(0.02)			
ALCATEL LUCENT:	10.94	(0.07)			
AMDOCS:	35.80	(0.76)			

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