

CableFAX Daily™

Monday — September 15, 2008

What the Industry Reads First

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Diversity Week: NAMIC Conference Gears Up for Week, Year Ahead

Hell Week, Diversity Week, whatever you choose to call it will come to an end at the close of the **Kaitz Foundation's** annual fundraising dinner Wed night. And if you thought the week was busy, next year's new, consolidated fall week will be even more jam-packed. **CTAM Summit**, **NAMIC's** conference, the Kaitz Dinner, **SCTE Expo**, **CableLabs' Seminar**, the **Cable Center Hall of Fame dinner** and **ACC Forum** are among events being consolidated into the week of Oct 25 in Denver. Other gatherings, including **Cable Positive's** dinner, will be held in Apr around **NCTA's Cable Show**. As NAMIC pres *Kathy Johnson* gears up for this week's conference in NYC, she already has her eye on next year's event. "We're cautiously optimistic about attendance. Currently about 40% of our attendees come from NYC, so we hope they will follow us out to Denver," she said. "And about 60% of our attendees come from the Eastern seaboard, so we're hoping we can attract new constituencies that perhaps couldn't attend in the past." While attendance is a bit of a question mark, Johnson noted that the group is excited to have more time for advance planning and cheaper venues than in the Big Apple under the new structure. This year's conference begins Sun. As with many shows during the slumping economy, NAMIC is seeing a dip in attendance. Johnson expects about 600 attendees vs 750 last year. Highlights include the release of NAMIC's bi-annual employment survey. NAMIC saw the number of companies participating in the survey increase to 16 from 14. While that's only 2 additional companies, Johnson noted that some of the participants are larger than those in '06. The 16 companies represent 220K+ employees, while the 14 in '06 represented approx 108K. The survey will be dissected during Mon's general session, which includes **Scripps Nets** pres *John Lansing* as a panelist. Lansing said the NAMIC confab remains an important gathering for the industry. "It's just common sense if the basic goal is to thrive and see into the future that we recognize the value and importance of having not only a diverse workforce, but a product that is representative of the diverse community that we seek to serve both as programmers and distributors," he said. New this year is NAMIC's 1st ad track, which **CAB** and **ADCOLOR** helped create. "Depending on what the interest is, we'll look forward to doing further initiatives around ad sales," Johnson said. (Check out "Diversity Dinner" below for more on this week's activities.)

Wilmington Lessons: One of the takeaways from Wilmington, NC's early DTV transition is that efforts need to focus not just on awareness of the transition, but specific problems that might occur, says **FCC** commish *Michael Copps*. The Dem, who was the driving force behind the Wilmington test, put together a list of new proposals aimed at making Feb's national switch go more smoothly. Copps' suggestions include additional field testing, even if it's limited, and creation of a special checklist for converter box problems (such as scanning channels). He also wants the FCC to beef up its call center. Most broadcasters are supposed to completely shut down analog transmission after Feb 17, but Copps is pushing for PSA slides (similar to what Wilmington has) to run on analog for about 2 weeks post-transition. Meanwhile, Sen Commerce has scheduled a hearing on the FCC and **NTIA's** DTV transition efforts, Sept 23, 2:30pm ET.



is for happy hour



insidehallmarkchannel.com

August marks the 27th consecutive month we're happily at home as a Top 10 network in primetime.

Source: Nielsen Galaxy Explorer, Jun 04-Aug 08/29/04 - 8/31/08, Monthly Prime Time (M-Su 8-11p) average, Live+SD coverage area HI ratings among all ad-supported cable networks. Further qualifications available upon request.

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Biz Business: **Time Warner Cable** is leading the public MSO charge into commercial services with 6% market share in business Ethernet services, according to an analysis by **Vertical Systems Group** based on port share as of Jun 30. **Cox** owns 10% of the market, which is led by **AT&T** (21%) and **Verizon** (15%). Compared to Dec 31 share, TWC gained 1 percentage point, Cox held steady, AT&T shed 1 point, Verizon lost 2, and **Qwest** gained a pair to 8%.

Research: Cable MSOs will lose 300K subs over the next 5 years, while DBS ops gain 2.4mln and telcos welcome 9.2mln, according to **SNL Kagan**. Even so, cable's expected to add 48mln subs to advanced services over the next decade while experiencing increased FCF from RGU growth and falling capex. Other data: cable VoIP subs could total more than 18mln by YE, compared to 6.4mln in '06; industry RGUs are pacing toward 164.4mln by YE; and digital cable subs currently number approx 37mln and could jump to 42mln by Jan.

IBC Tech Roundup: **Texas Instruments** bowed the 1st **DOCSIS 3.0** data and video gateway that supports 8 down-stream channels anywhere within the spectrum. Currently, the company said, digitally connected homes can be served more effectively by bonding 4 channels together, yielding a min aggregate data rate of 160 Mbps. -- **Qualcomm** announced new apps for its mobile broadcast platform **MediaFLO** such as real-time user presence, referrals and chat, program reminders and aggregated user program ratings. -- Service providers will be able next year to insert interactive ads into programming and alongside program guides through **Mediaroom**, **Microsoft's** IPTV platform.

Diversity Dinner: Among the talent for **Kaitz's** dinner Wed are 2 of cable's best diversity stories. **Food Network** host **Ingrid Hoffmann** is a walking advertisement for diversity. A self-described "Latin mutt," the 43-year-old chef is of Colombian, Peruvian, Bolivian, Argentine and German descent. "And I cook in all of them," she tells us. As you'd expect, Hoffmann loves mixing Latin and American classics in the kitchen. "I cook in Spanglish," she jokes, noting "I'm proud to be representing my community" at Kaitz, especially since it's also Hispanic Heritage Month. **CNN** anchor/reporter **Rick Sanchez** had to be dragged into journalism. The Cuban-born Sanchez says "there were no Hispanic reporters on television when I was growing up. Somebody had to convince me that this was a possible career for me." Now the 50-year-old is giving back. Sanchez recently hosted 2 young Latino journalists who won **SiTV's** "Crash the Parties" contest. SiTV embedded the two journalists at the presidential conventions.

Ratings: We love it when quality programming gets numbers, especially this time. **History's** 9/11 doc "102 Minutes That Changed America" Thurs averaged 5.2mln viewers and a 3.8 HH rating, the net's 2nd-best numbers ever. In its 29-54 core demo, 102 grabbed 2.9mln viewers, making it the best History special ever.

New Media: **Comcast** is among the 20+ companies that have teamed up on an initiative to allow consumers to acquire and play content that they buy online across a wide range of devices and services. Other consortium members include **NBCU**, **Fox** and **Microsoft**. [For more details, go to www.cablefaxcontentbusiness.com] -- **Comcast** and **Thumbplay** are adding a library of mobile ent downloads to **Comcast.net**, including ringtones, music, and games. Comcast.net users can download the content onto their hand sets on an a la carte basis or using paid subscription-based credits. The portal's mobile service will also offer Comcast email access, Web search and updated news.

Business/Finance: **Landmark** closed the sale of **Weather Channel Cos** to **NBCU/The Blackstone Group/Bain Capital**. The deal is reportedly valued at \$3.5bln.

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WIDE APPEAL.



CableFAX Week in Review

Company	Ticker	9/12 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
BRITISH SKY:	BSY	32.44	2.40%	(30.2%)
DIRECTV:	DTV	27.59	3.80%	19.30%
DISNEY:	DIS	33.28	6.10%	3.10%
ECHOSTAR:	DISH	28.12	1.30%	(17.2%)
GE:	GE	26.77	(4%)	(21.1%)
HEARST-ARGYLE:	HTV	20.84	1.90%	(4.2%)
ION MEDIA:	ION	1.44		11.60%
NEWS CORP:	NWS	14.41	4.70%	(31.3%)
MSOS				
CABLEVISION:	CVC	29.69	(2.8%)	21.20%
CHARTER:	CHTR	1.02	(1.9%)	(12.8%)
COMCAST:	CMCSA	21.71	5.30%	20.20%
COMCAST SPCL:	CMCSK	21.53	5.10%	20.20%
GCI:	GNCMA	10.25	(2.2%)	17.10%
KNOLOGY:	KNOL	9.36	(4.4%)	(26.8%)
LIBERTY CAPITAL:	LCAPA	15.27	(2.4%)	(34.5%)
LIBERTY ENT:	LMEDIA	27.20	2.10%	12.50%
LIBERTY GLOBAL:	LBTYA	32.21	(4.3%)	(17.8%)
LIBERTY INTERACTIVE:	LINTA	13.84	1.00%	(27.5%)
MEDIACOM:	MCCC	7.78	4.40%	69.50%
SHAW COMM:	SJR	22.40	4.20%	(0.3%)
TIME WARNER CABLE:	TWC	27.36	1.40%	(0.9%)
VIRGIN MEDIA:	VMED	11.05	(3.4%)	(31.9%)
WASH POST:	WPO	609.18	5.20%	(20.9%)

Company	Ticker	9/12 Close	1-Week % Chg	YTD %Chg
PROGRAMMING				
CBS:	CBS	16.85	1.80%	(33.4%)
CROWN:	CRWN	4.53	(2.8%)	(30.3%)
DISCOVERY:	DISCA	19.44	(0.4%)	(22.7%)
EW SCRIPPS:	SSP	7.23	5.00%	(93.1%)
GRUPO TELEVISIA:	TV	22.95	0.80%	(0.4%)
HSN:	HSNI	14.57	(3.1%)	(2.1%)
LIBERTY:	L	41.84	(1.1%)	(16.9%)
LODGENET:	LNET	3.44	(16.5%)	(80.3%)
NEW FRONTIER:	NOOF	3.88	1.00%	(15.3%)
OUTDOOR:	OUTD	8.03	4.70%	16.40%
PLAYBOY:	PLA	3.97	(1.7%)	(56.5%)
RHI:	RHIE	12.33	(12.8%)	(2.4%)
SCRIPPS INTERACTIVE:	SNI	40.84	1.50%	0.50%
TIME WARNER:	TWX	14.57	(4.5%)	(9.9%)
VALUEVISION:	VVTV	2.37	(4%)	(62.3%)
VIACOM:	VIA	27.16	(3.9%)	(38.2%)
WWE:	WWE	15.32	(4.6%)	16.80%

Company	Ticker	9/12 Close	1-Week % Chg	YTD %Chg
TECHNOLOGY				
3COM:	COMS	2.01	(5.6%)	(55.5%)
ADC:	ADCT	10.25	0.70%	(34%)
ADDVANTAGE:	AEY	3.10	(0.6%)	(49.8%)
ALCATEL LUCENT:	ALU	5.13	(4.6%)	(29.9%)
AMDOCS:	DOX	27.96	(4.6%)	(18.9%)
AMPHENOL:	APH	45.21	1.60%	(2.2%)
APPLE:	AAPL	148.94	(7%)	(24.8%)
ARRIS GROUP:	ARRS	9.50	7.00%	(4.8%)
AVID TECH:	AVID	25.31	9.90%	(10.7%)
BIGBAND:	BBND	4.05	27.40%	(21.2%)

Company	Ticker	9/12 Close	1-Week % Chg	YTD %Chg
BLNDER TONGUE:	BDR	1.39	11.20%	(16.3%)
BROADCOM:	BRCM	22.15	(0.8%)	(15.3%)
C-COR:	CCBL	11.00		
CISCO:	CSCO	23.46	5.40%	(13.3%)
COMMSCOPE:	CTV	42.46	(3.8%)	(13.7%)
CONCURRENT:	CCUR	6.82	(1.4%)	(18.1%)
CONVERGYS:	CVG	16.40	2.10%	(0.4%)
CSG SYSTEMS:	CSGS	18.31	(0.8%)	24.40%
ECHOSTAR HOLDING:	SATS	28.58	(8.5%)	(13.1%)
GOOGLE:	GOOG	437.66	(1.5%)	(36.7%)
HARMONIC:	HLIT	8.84	10.10%	(15.6%)
JDSU:	JDSU	9.42	(1.7%)	(28.9%)
LEVEL 3:	LVL	3.44	7.20%	13.20%
MICROSOFT:	MSFT	27.62	7.70%	(20.9%)
MOTOROLA:	MOT	8.10	(10.6%)	(47%)
NDS:	NNDS	59.90	(1.2%)	1.10%
NORTEL:	NT	5.45	(5.2%)	(63.9%)
OPENTV:	OPTV	1.50	(6.3%)	13.60%
PHILIPS:	PHG	30.49	(3%)	(21.5%)
RENTRAK:	RENT	14.41	(0.9%)	(0.3%)
SEACHANGE:	SEAC	8.06	2.70%	11.50%
SONY:	SNE	34.85	(3.4%)	(35.8%)
SPRINT NEXTEL:	S	7.19	(10%)	(45.2%)
THOMAS & BETTS:	TNB	43.91	3.00%	(10.5%)
TIVO:	TIVO	7.70	(1.9%)	(7.7%)
TOLLGRADE:	TLGD	5.74	(15.2%)	(28.4%)
UNIVERSAL ELEC:	UEIC	25.83	0.80%	(22.8%)
VONAGE:	VG	1.25	(1.6%)	(45.7%)
WEBB SYS:	WEBB	0.04	(33.3%)	
WORLDGATE:	WGAT	0.30		
YAHOO:	YHOO	19.08	5.50%	(18%)

Company	Ticker	9/12 Close	1-Week % Chg	YTD %Chg
TELCOS				
AT&T:	T	31.57	0.20%	(15.4%)
QWEST:	Q	3.77	(0.8%)	(39.4%)
VERIZON:	VZ	34.51	1.30%	(12.7%)

Index	Value	1-Week % Chg	YTD %Chg
MARKET INDICES			
DOW:	11421.99	1.80%	(13.9%)
NASDAQ:	2261.27	0.20%	(14.7%)

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS		
COMPANY	CLOSE	1-WK CH
1. BIGBAND:	4.05	27.40%
2. BLNDER TONGUE:	1.39	11.20%
3. HARMONIC:	8.84	10.10%
4. AVID TECH:	25.31	9.90%
5. MICROSOFT:	27.62	7.70%

THIS WEEK'S STOCK PRICE LOSERS		
COMPANY	CLOSE	1-WK CH
1. WEBB SYS:	0.04	(33.3%)
2. LODGENET:	3.44	(16.5%)
3. TOLLGRADE:	5.74	(15.2%)
4. RHI:	12.33	(12.8%)
5. MOTOROLA:	8.10	(10.6%)



Gregory Bunch,
VP Western Region

Ovation TV supports NYC Diversity Week

Congratulations, Gregory, on your selection as one of the Top Minorities in Cable.



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MaxFAX...

The Last Kaitz Week... Part II

In the Big Apple again...

Dinner with friends one night...

Choice of a **Cable Positive** (always worthy) event or my annual favorite with **A&E** on Tuesday night... the “gala” dinner with a thousand or so of our best friends the next evening... and escape from New York Thursday evening...



Paul S. Maxwell

Board meetings, cocktails, too early breakfasts, lunches

and more...

We used to call it “Hell Week.”

It wasn't... but it sure seemed like it sometimes.

(This isn't really the 25th annual dinner... we missed one... not our fault it got cancelled. It is the 25th anniversary of the first dinner, though. Highlights and lowlights; great honorees—mostly; some boring speeches; ill-conceived “entertainment”—though not always; semi-OK food—too many ballrooms that, no matter where they are, always look the same).

Next year's calendar of events should prove quite interesting...

All in a good cause.

Random Notes:

• **Buzzzzz:** Last week in San Diego at the Demo Show, there were a couple of new ideas to pay attention to: (1) if you like newspapers, **Plastic Logic** debuted its e-reader—a foldable, portable document reader about 8 x 11—sort of a different take on the **Kindle** (my current favorite and upon which I read the *Journal* and *Times* daily—and check out the cover of the 75th anniversary of *Esquire* magazine); and (2) **Bee TV**—a whole new take on navigation that is multi-platform, incorporates a push element and might be a paradigm changer.

• **Pirates of the COAX:** This is one of the problems the industry likes to keep under the radar... don't blame anybody for that, but like a crazy uncle in the attic, this won't go away. Recently, I wound up on the board of a company (not this one) with a guy out there doing something about signal piracy (video and/or broadband, by the way) in a manner that works for (almost) everyone—pirate, distributor and the overcrowded legal system. *Stan McGinnis*—an ex-retail exec who knows a thing or two about “shrinkage”—runs the company and has, from the examples I've seen, solved some of the problems you'd rather sweep under a rug... info? Email me.

• **Socialism?** Back about when it first got some notice, I logged onto **Facebook** and... promptly forgot

about it. But in the last two weeks I've gotten over a hundred “be my friend” emails... is there some tipping point here? Doesn't anyone have anything else to do? Did they get stored up all these months and suddenly get released? Did **MySpace** shut down? (Haven't answered all of them... yet... took me a week to figure out the registration and password I had used. And, just so you know, **LinkedIn** doesn't like me... kicks me out for some unknown reason... I'm not ignoring people... just frustrated).

• **Hall of Famers:** The social season ain't over yet... later this month the first Presidential debate... next month a couple of Halls of Fame and the Veep debate and another top-of-the-ticket lovefest... the election and **CTAM** in November in Boston. This year, Thanksgiving will come with a bit of relief.

• **Gutter Balls:** Ads are good for cable's bottom line... political ads are, too. It sure is a good thing national and local cable channels don't fact-check the ads... there sure wouldn't be very many of them if we did that! Ain't no high road this year.

Paul Maxwell

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CableFAX

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View the finalists in 36 categories at Cable360.net/events/programawards

Winners will be announced at an October 29th Luncheon at the National Press Club, DC and in CableFAX: The Magazine

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