

CableFAX Daily™

Thursday — September 20, 2012

What the Industry Reads First

Volume 23 / No. 182

Ad Sales: Still Strong Despite Global Weakness, Programming Execs Say

Despite reports that overall ad sales have weakened worldwide, **Discovery Comm** and **Viacom** execs were upbeat at **Goldman Sachs** Communacopia investor conference Thurs. "The market for us is still robust," Discovery CFO *Andy Warren* said. Ad sales were impacted during the London Olympics but pricing is still going strong and the company expects mid-to-high single digit ad sales growth domestically. The 4Q scatter market is healthy, he said. Specifically, robust ad sales growth could come from **Investigation Discovery** which has seen solid ratings growth. However, it may take some time for the pricing "to match the heft of that network... Clearly, the CPM and ad sales are lagging," Warren said. For ID and other developing nets like **Science** and **Military Channel**, expanding carriage is critical, he said. "One great asset Discovery has is its relationship with its affiliates." The company's looking for "a collaborative win-win approach" as some 20% of affil contracts mature this year, he said. The financial chief's also optimistic about **OWN**. The 20-month old net is "right on track with our expectations" and is expected to post solid financial results next year, he said. When it comes to M&A, Discovery might have an appetite for small scale acquisitions, according to Warren. "We are putting a lot more money behind content-spend in 2012 versus 2011... If we could find the right accretive acquisition, we would like to do that." A good example is the company's purchase of online TV net **Revision3** this year. It's a good buy because Discovery can maximize the value potential of the content produced by Revision3, he said. Regarding large-scale transactions, "it's something we always take a look at, but probably in the international space, where we'd put most of our capital to work, if possible," he said. Though western EU ad sales have been soft, Asia and Latin America markets are still seeing "good robust ad growth." Having said that, the company's **TLC** hit series "Here Comes Honey Boo Boo" might not transfer well to many intl territories such as India, according to Warren. At Viacom, scatter ad pricing has picked up after the Olympics, CEO *Philippe Dauman* said. "We are seeing good demand. Scatter pricing is up in the teens compared to upfront pricing. We are pleased we went into the upfront early," he said. Like Discovery, markets in EU are still struggling because of weak economies. Another ever-trending topic that came up at the conference is programming cost. Viacom's affil fees only make up a smaller fraction of overall content costs to distributors despite a sizable presence, Dauman said. He also took a few shots at sports programming, especially RSNs. "A lot of the absolute drivers of costs increases have been in the area

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Robert Irvine
RESTAURANT: IMPOSSIBLE

Sabrina Soto
THE HIGH LOW PROJECT

HGTV | food network | scrippsnetworks interactive | Passionate Viewers Live Here

Sources: Beta Research, Cable Subscriber Evaluation Study, August 2012. Based on Women 18+.

PROGRAM AWARDS

The Golden Age of Cable...

We're proud to highlight the finalists for the **2012 CableFAX Program Awards**, recognizing the best shows, talent and executive savvy across the wide breadth of cable content. Please join us on Oct 30 at the W New York for our annual Program Awards and Top Ops breakfast where this year's winners will be revealed. More info: www.cablefax.com/ProgramAwards/

Program Hall of Fame, Class of 2012



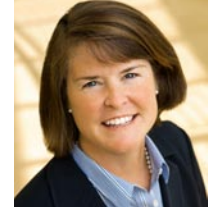
Frances Berwick
Bravo



Ed Carroll
AMC Networks



Jim Cramer
CNBC



Eileen O'Neill
Discovery Communications

Platinum: Best Actor in Cable

Dominic West - Appropriate Adult - Sundance Channel
Patrick J Adams - Suits - USA Network
Peter Dinklage - Game of Thrones - HBO
Mandy Patinkin - Homeland - Showtime

Platinum: Best Actress in Cable

Emily Watson - Appropriate Adult - Sundance Channel
Callie Thorne - Necessary Roughness - USA Network
Emmy Rossum - Shameless - Showtime
Connie Britton - American Horror Story - FX
Laura Dern - Enlightened - HBO

Platinum: Best Showrunner

Lizzy Weiss - Switched at Birth - ABC Family
Vince Gilligan - Breaking Bad - AMC
Glen Mazzara - The Walking Dead - AMC/MPRM Communications
Ryan Murphy - American Horror Story - FX

Platinum: Best New Cable Program

Switched at Birth - ABC Family
Appropriate Adult - Sundance Channel
Veep - HBO
Homeland - Showtime
American Horror Story - FX

Platinum: Best Cable Program

The Walking Dead - AMC
Breaking Bad - AMC
White Collar - USA Network
Game of Thrones - HBO
Boardwalk Empire - HBO
Shameless - Showtime

Best Actor/Actress/Host - Comedy

Joel McHale, The Soup - E! Entertainment
Carrie Brownstein - Portlandia - IFC
Fred Armisen - Portlandia - IFC
Charlie Day - It's Always Sunny in Philadelphia - FX

Best Actor/Actress - Family Friendly

Florence Henderson - Just Where I Belong - TBN and Smile of a Child TV
Dean Cain - The Case for Christmas - Hallmark Channel
David A.R. White - Brother White - GMC

Best Host - Food

Bobby Flay - multiple shows - Food Network
Alton Brown - Good Eats, Iron Chef America, Feasting on Asphalt - Food Network
Anthony Bourdain - Anthony Bourdain: No Reservations - Travel Channel

Best Host - News/Public Affairs

Paula Zahn, On the Case with Paula Zahn - Investigation Discovery
Anderson Cooper, Anderson Cooper 360 - CNN
Shepard Smith, Studio B and Fox Report - Fox News

Best Actor/Actress/Host - Other

Florence Henderson - Just Where I Belong - TBN and Smile of a Child TV
Jean Chatzky - Cash Call with Jean Chatzky - RLTV
Nigel Lythgoe & Debbie Allen: Battle of the Nutcrackers - Ovation

Best Host - Reality Competition/Game Show

Padma Lakshmi - Top Chef - Bravo Media
Billy Eichner - Funny or Die's Billy on the Street - Fuse
Heidi Klum - Project Runway - Lifetime

Best Host - Sports

Mike Breen and Jeff Van Gundy - NBA on ESPN - ESPN
Harold Reynolds - Studio Analyst - MLB Network
Matt Winer - GameTime - NBA TV

Ernie Johnson - Inside the NBA - Turner Sports

Best Host - Talk Shows

Suze Orman - The Suze Orman Show - CNBC
Chelsea Handler - Chelsea Lately - E! Entertainment
Kevin Millar and Chris Rose - Intentional Talk - MLB Network
Lynn Doyle - It's Your Call with Lynn Doyle - The Comcast Network

Best Show or Series - Animals/Nature

Swamp Wars - Animal Planet/2C Media
Dropped: Project Alaska - Sportsman Channel
Dog Whisperer - National Geographic Channel

Best Show or Series - Animated

Jingle All the Way - Hallmark Channel
Transformers Prime - The Hub TV Network
My Little Pony Friendship is Magic - The Hub TV Network

Best Show or Series - Regional

Chicago White Sox Spring Training 2012 "The Fan Experience" - Comcast- Chicago
10 Years of YES - YES Network

Best Show or Series - Children's

Pajanimals: Blankie in the Laundry - Sprout
R.L. Stine's The Haunting Hour - The Hub TV Network
Transformers Rescue Bots - The Hub TV Network
Yankees on Deck - YES Network

Best Show or Series - Comedy

Melissa & Joey - ABC Family
After Lately - E! Entertainment
Portlandia - IFC
Wilfred - FX

Best Show or Series - Documentary

CNBC's Billions Behind Bars: Inside America's Prison Industry - CNBC
 CNBC's The Costco Craze: Inside the Warehouse Giant - CNBC
 Our America with Lisa Ling - OWN: Oprah Winfrey Network
 To Not Fade Away - RLTV
 The Captains - EPIX
 George W. Bush: The 9/11 Interview - National Geographic Channel

Best Show or Series - Drama

The Secret Life of the American Teenager - ABC Family
 Luther - BBC America
 Justified - FX
 Sons of Anarchy - FX

Best Show or Series - Education/ Instructional

Science & U! - Science, Technology and Outer Space - CUNY TV
 Making Medicare Work for You: Boomers, Welcome to Medicare - RLTV
 DIY Network's Rehab Addict - DIY Network

Best Show or Series - Faith Based

Mary Mary - WE tv
 Just Where I Belong - TBN and Smile of a Child TV

Best Show or Series - Family Friendly

Dry Creek - BlueHighways TV
 The Good Night Show: Differences - Sprout
 R.L. Stine's The Haunting Hour - The Hub TV Network
 Clue - The Hub TV Network
 Family Game Night - The Hub TV Network

Best Show or Series - Food

Travel Channel's Bizarre Foods America - Travel Channel
 Cooking Channel's Unique Sweets - Cooking Channel
 In Search of Food - Ovation

Best Show or Series - Music

Britney Spears: Femme Fatale Tour - EPIX
 Seth MacFarlane: Swingin in Concert - EPIX
 Hip Hop Shop - Fuse

Best Show or Series - News

CNBC's America's Oil Rush: Boom or Bust - CNBC

Viewpoint with Eliot Spitzer - Current TV
 Dan Rather Reports - AXS TV
 Healing Heroes - Time Warner Cable's YNN Austin
 On the Case with Paula Zahn - Investigation Discovery

Best Show or Series - Other

Top Gear - BBC Worldwide Productions
 Vietnam in HD - History
 Injustice Files: At The End of A Rope - Investigation Discovery
 Five - Lifetime
 Dropped: Project Alaska - Sportsman Channel
 Wildfire Relief: Time to Rebuild - Time Warner Cable's YNN Austin
 Motor City Rising - Ovation

Best Show or Series - Public Affairs

Florida - Cuba: A New Connection - Bay News 9
 BrianLehrer.tv - CUNY TV
 Sin By Silence - Investigation Discovery

Best Show or Series Reality - Autobiographical

It's a Brad Brad World - Bravo Media
 Shahs of Sunset - Bravo Media
 Braxton Family Values - WE tv
 Tia and Tamera - Style Media

Best Show or Series Reality - Professions

No Kitchen Required - BBC America
 Richard Hammond's Crash Course - BBC America
 Family Pickle- Old School, New School - RLTV
 Welcome to Sweetie Pie's - OWN: Oprah Winfrey Network
 Million Dollar Listing New York - Bravo Media

Best Show or Series Reality - Mystery/ Investigation

Finding Bigfoot - Animal Planet
 Travel Channel - Ghost Adventures
 Syfy - Destination Truth

Best Show or Series - Reality/ Competition

Around the World in 80 Plates - Bravo Media
 Top Chef - Bravo Media
 Project Runway - Lifetime
 Food Network's The Great Food Truck

Race - Food Network
 Family Game Night - The Hub TV Network
 American Ninja Warrior - G4

Best Show or Series - Sci Fi

Doctor Who - BBC America
 Warehouse 13 - Syfy
 Falling Skies - TNT

Best Show or Series - Sports

NBA on ESPN: Eastern Conference Finals - ESPN
 The Association: Denver Nuggets - NBA TV
 Wilt 100 - NBA TV
 Countdown to London - Universal Sports Television Network
 The Journey: Big Ten Basketball 2012 - Big Ten Network

Best Show or Series - Talk Shows

The Graham Norton Show - BBC America
 Chelsea Lately - E! Entertainment
 The Mortified Sessions - Sundance Channel
 CenterStage - YES Network

Best Online/Mobile Extras for a Linear Show

Discovery Channel's Gold Rush Aftershow - Discovery Channel
 Nascar.com: Race Buddy - Turner Sports
 TNT Overtime - Turner Sports
 PGA Championship Live on PGA.com - Turner Sports
 So You Think You Can Dance - Ovation

Best Opening Sequence

NBA on ESPN: Eastern Conference Finals - ESPN
 We'll Take Manhattan - Ovation
 2011 Rugby World Cup - Universal Sports Television Network
 Spartacus: Vengeance - Starz

Best Video on Demand Program/ Special

Vino Vino - Bay News 9
 Battle of the Fans: Football Final 2011 - Comcast.cn100 - Chicago
 Chicago Bears On Demand Training Camp - Comcast.cn100 - Chicago
 Merry Christmas with Mariah Carey - Music Choice

To register for the event visit:
<http://www.cablefax.com/programawards>

CABLEFAX DAILY (ISSN 1069-6644) is published daily by Access Intelligence, LLC ● www.cablefaxdaily.com ● fax:301.738.8453 ● Editor-in-Chief: Amy Maclean, 301.354.1760, amaclean@accessintel.com ● Exec Editor: Michael Grebb, 818.945.5309, mgrebb@accessintel.com ● Editor: Joyce Wang, 301.354.1828, jwang@accessintel.com ● Community Editor: Kaylee Hultgren, 212.621.4200, khultgren@accessintel.com ● Advisor: Seth Arenstein ● Group Publisher, Media Entertainment: Denise O'Connor ● Publisher: Debbie Vodenos, 301.354.1695, dvodenos@accessintel.com ● Assoc Publisher: Amy Abbey, 301.354.1629, aabbey@accessintel.com ● Marketing Dir: Barbara Bauer, 301.354.1796, bbauer@accessintel.com ● Prod: Joann Fato, 301.354.1681, jfato@accessintel.com ● Diane Schwartz/SVP Media Communications Group ● Subs/Client Services: 301.354.2101, fax 301.309.3847 ● Group Subs: Amy Russell, 301.354.1599, arussell@accessintel.com

of networks that specialize in sports, many of which ironically are owned by the distributors themselves, many of which charge for their individual channels more than we charge for all of our channels combined." Meanwhile, the net is working to improve **Nickelodeon** ratings, which took a deep dive last year and were stabilized recently. "We have to climb back out and look to getting progress for the rest of the year," Dauman said. One of the strategies is original programming. Nick will see a 70% YOY increase in original programming in 4Q. Dauman also touched on program deals with OTT video providers like **Netflix**. The deals help Viacom and its distributors market TV shows, he said. "It's been additive."

TWC Sports: If distributors don't sign up to carry **Time Warner Cable's** L.A. RSNs when they launch Oct 1, that'll just give the MSO a competitive advantage, TWC COO **Rob Marcus** said at an investor conference Wed. "We kind of think it's a win-win," he said, explaining that if MVPDs do take the net, TWC expects to come out ahead of how much it would have spent on 3rd party rights to the Lakers and Galaxy. "And if you add to all that financial analysis the value of associating with what I think is the best brand in the L.A. market ... the impact that it has on the image and brand of Time Warner Cable is just the icing on the cake," said Marcus. In the meantime, TWC has launched the requisite www.iwantmylakers.com so that fans can pressure their providers to carry the net (and so they can see that TWC will have it). Meanwhile, **Time Warner Cable SportsNet** unveiled its studio programming lineup. "Access SportsNet" will be the net's signature daily studio show and it will encompass pre- and post-game shows for the Lakers and Galaxy. It'll air nightly at 7pm with a 2nd live show at 10pm. Also on tap: "#LakeShow," an interactive studio program highlighting conversations about the team and fan-driven social media interaction (will air 90 mins prior to tip-off on game days and at 6:30 pm on all other days and run all Lakers season long). Other Lakers programming includes "Encore+" (classic Lakers games with social media interaction) and "Lakers Compacto" (games condensed into 1-hour format).

More Sports: **Fox** and **Turner** are close to a deal with **MLB** that will have them paying more than double what they previously shelled out for games, *Sports Business Daily* reported late Wed. SBD pegs Fox's 8-year deal at \$4bln (close to \$500m/yr/year) and Turner at \$2.8bln (nearly \$300m/yr/year). While there was talk of mixing things up, it sounds like the 2 will essentially keep their current baseball packages. **CBS** reportedly dropped out of a joint bid with Turner, and **NBC** didn't bid high enough. -- **Cablevision** is ready for some football, even without a retrans agreement with **Tribune**. Thanks to the MSO's deal with **NFL Net**, and its free preview of the cable channel, subs won't miss a minute of the Giants-Panthers game Thurs night. In addition to NFL Net, the game will be broadcast on Tribune's **WPIX**. The MSO has been without WPIX since Aug 17. It lost Tribune's Hartford **Fox** affil **WTIC** and **WGN** America on Aug 25.

Conference Notebook: Frank talk on programming costs from **Comcast** CFO **Michael Angelakis** at **Goldman Sachs** Investor conference Wed. "I don't think we're going to see" actual programming costs go down, he said. Yes, some of it's due to inflation in the cost of programming, but it's also because distributors are asking for more rights today. "Ten years ago, it was the linear feed and some VOD. Today it's a vastly different discussion. Linear, VOD, SVOD, in-home, out-of-home, tablets, smartphones and wireless," he said. Other morsels: Comcast is willing to work with partners (like **Apple**) to provide "the best video experience" possible to customers. The company already has the cash in hand from its **SpectrumCo** (\$2.3bln pre-tax) and **A&E** (\$3bln pre-tax) transactions. It's too soon to think about redeeming **GE's** 49% **NBCU** interest, with GE having the option in '14, according to Angelakis. -- Most notable (and depressing) moment in **Time Warner Cable** COO **Rob Marcus'** appearance were his remarks that the company hasn't seen any real improvement in economic trends. He reiterated CFO **Irene Esteves'** comments last week that the MSO will be disciplined with all M&A (including potential CLEC deals following the **FCC's** forbearance).

Big Promo: **Linda Yaccarino**, who joined **NBCU** from **Turner** late last year, was upped to pres, ad sales for NBCU. She will oversee all ad sales and market strategy for the company's broadcast, cable and digital properties, reporting into CEO **Steve Burke**. She joined the programmer in Nov as pres, cable ent & digital ad sales, replacing **Dave Cassaro**.

In the States: **CWA** and **IBEW** announced a tentative agreement with **Verizon** for some 43K East wireline associates. This 3-year contract would replace the contract that expired in Aug. The unions will submit the agreement to their members for ratification. A new contract has also been negotiated between **Verizon Wireless** and 70 CWA-represented technicians who maintain cell sites in the metropolitan New York area.

Programming: **Comedy Central** renewed hit "Tosh.0" for a 5th season. -- **FX** entered into an exclusive 2-year agree-

BUSINESS & FINANCE

ment with **Paul Giamatti**, **Dan Carey** and their prod company **Touch Feely Films** for a 1st-look deal. -- **Travel** is giving sophomore seasons to "Baggage Battles," "Hotel Impossible," "Toy Hunter" and "Trip Flip." In addition, it has added 6 new eps of "Toy Hunter" to the current run, including a holiday special to air in Dec. -- "Tales from the Crypt" returns to network TV Oct 5 for the first time since '04. **FearNet** will be the new home of the anthology horror series, with eps debuting Fri nights in a 2-hour block at 10pm ET. -- **ABC Family** greenlit 3 pilots-- "Terminales," a 1-hour drama adapted from the **Televisa** series, and 2 new comedies, "Phys Ed" and "Continuing Fred." The pilots will go into production this fall.

People: New to **Turner** is **Erin Felentzer**, who will serve as vp, PR for **TNT**. She most recently served as vp, comm for **ABC Ent Group**. -- **AMC Nets** named **John Hsu** treasurer, in addition to his current role as svp, financial strategy. -- **Crown Media Family Networks** named **Randy Pope** vp, programming.

On the Circuit: **NCTA** chief of staff and **Michael Powell's** right-hand man **Dane Snowden** will join **Cable-Labs** CEO **Phil McKinney** and **SCTE** CEO **Mark Dzuban** for an "Industry Leader" roundtable during **Cable-Tec Expo** next month (Oct 17, Orlando). -- Look for **Verizon** chmn/CEO **Lowell McAdam** to deliver the keynote for CES in Jan.

CableFAX Daily Stockwatch

Company	09/19 Close	1-Day Ch	Company	09/19 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
DIRECTV:	53.64	0.20	CONCURRENT:	4.32	(0.03)
DISH:	31.35	(0.63)	CONVERGYS:	16.06	0.02
DISNEY:	52.70	0.80	CSG SYSTEMS:	22.88	0.26
GE:	22.43	0.19	ECHOSTAR:	29.16	0.33
NEWS CORP:	25.09	0.35	GOOGLE:	727.50	9.22
MSOS					
CABLEVISION:	16.72	0.16	HARMONIC:	4.86	(0.03)
CHARTER:	80.38	0.49	INTEL:	23.15	(0.22)
COMCAST:	35.38	0.54	JDSU:	13.19	(0.01)
COMCAST SPCL:	34.42	0.46	LEVEL 3:	23.84	(0.13)
GCI:	9.74	0.03	MICROSOFT:	31.05	(0.12)
LIBERTY GLOBAL:	57.28	(0.13)	RENTRAK:	16.98	0.01
LIBERTY INT:	18.60	0.06	SEACHANGE:	8.05	(0.02)
SHAW COMM:	20.84	(0.1)	SONY:	13.29	0.08
TIME WARNER CABLE:	93.36	0.80	SPRINT NEXTEL:	5.56	0.37
VIRGIN MEDIA:	30.32	0.41	TIVO:	9.69	(0.15)
WASH POST:	363.17	0.84	UNIVERSAL ELEC:	17.02	(0.03)
PROGRAMMING					
AMC NETWORKS:	41.25	0.68	VONAGE:	2.49	0.05
CBS:	37.06	0.49	YAHOO:	15.86	(0.04)
CROWN:	1.70	0.01	TELCOS		
DISCOVERY:	59.44	0.93	AT&T:	37.76	0.10
GRUPO TELEVISIA:	24.54	0.61	VERIZON:	45.27	0.36
HSN:	48.23	0.42	MARKET INDICES		
INTERACTIVE CORP:	52.69	0.89	DOW:	13577.96	13.32
LIONSGATE:	15.61	0.34	NASDAQ:	3182.62	4.82
LODGENET:	0.40	(0.01)	S&P 500:	1461.05	1.73
NEW FRONTIER:	1.35	(0.02)			
OUTDOOR:	7.20	(0.03)			
SCRIPPS INT:	61.66	0.50			
TIME WARNER:	45.51	0.64			
VALUEVISION:	2.28	0.17			
VIACOM:	54.44	2.04			
WWE:	8.71	(0.13)			
TECHNOLOGY					
ADVANTAGE:	2.14	(0.06)			
ALCATEL LUCENT:	1.21	(0.02)			
AMDOCS:	33.55	0.14			
AMPHENOL:	62.41	(0.21)			
AOL:	34.60	0.84			
APPLE:	702.10	0.19			
ARRIS GROUP:	13.46	(0.56)			
AVID TECH:	9.95	0.01			
BLNDER TONGUE:	1.04	0.01			
BROADCOM:	36.57	(0.35)			
CISCO:	19.12	0.07			
CLEARWIRE:	1.56	0.18			

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Think about that for a minute...

Adopting What?

Commentary by Steve Effros

As I noted last week, there's an increasing focus on the issue of "adoption rates" regarding hooking up to broadband service. The government, particularly the FCC, has made it a priority to attempt to deal with the issue of the "digital divide" and has gotten full support from the cable industry, particularly with NCTA's "Connect2Compete" program of discounted availability for low income homes. But as I also noted in last week's column, there are far more fundamental

issues regarding broadband availability and adoption than simply its price or speed.



Price and speed don't solve the problem of 15 to 20 percent of the adult population being characterized as "functionally illiterate." Internet connections to search for jobs, attain higher education or inter-

act with government offices is somewhat moot if you can't read, or don't have a computer. But there's another aspect to the entire discussion of "availability" as well as "adoption" of broadband that needs to be considered, and that's the understanding of exactly what broadband adoption and use is in the first place.

When the FCC majority came out with its conclusion that broadband was not being deployed in a "reasonable and timely" manner, it didn't take long to notice that in order to reach that conclusion (which, coincidentally, helps preserve their argument that they retain regulatory power) the Commissioners had left out a lot of numbers. For instance, they left out wireless Internet use. Of course that's one of the fastest growing segments, since "smartphones" are becoming ubiquitous, and do not seem to have the same demographic impediments that full-blown home computer/broadband connections do.

What do we really mean by "Internet" or "broadband" use? If I only use a "smartphone" or a "tablet" and a free WiFi

connection to download information or connect with a government agency am I not using the "Internet?" Have I "adopted" this new form of telecommunications even though I am not using a high-speed, wired, broadband connection? Of course I have. This is the same confusion that exists over "watching television" that I recently wrote about. Change the word to "video" and you no longer have the legacy image that the "TV" has to be in the home, connected to a power and cable outlet. It's just not true any more.

One of the most important and constantly improving parts of the technology puzzle is the ability of the infrastructures to hand off information back and forth between wired and wireless, between the cable broadband connection, powerline, WiFi, cellular, satellite and whatever else comes along. There are multiple experiments currently going on with all this, and there is certainly no one "right" way to do it as of now. We have to let the inventors, technologists, entrepreneurs and users continue to experiment, launch, try out new technology and business plans and, yes, both succeed and fail before, maybe, a consensus develops on how to integrate all these technologies and uses of "the internet" and "broadband."

Or maybe there will be multiple, competing approaches (Apple and Android come to mind) that help move "adoption" forward. I certainly don't know which way it's going to go, and I am darn sure that nobody else does either! Of course, that's the point. None of us should be so arrogant regarding desired adoption as to try to force a technical or economic "model" on a technology and business that is so dynamic we can't even accurately define what it is. Probably the best we can do is make sure we stay out of the way.

Steve

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(Steve Effros was President of CATA for 23 years and is now an advisor and consultant to the cable industry)

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