

CableFAX Daily™

Wednesday — October 1, 2008

What the Industry Reads First

Volume 19 / No. 190

CTAM Chatter: Summit Full Steam Ahead

With the markets yo-yoing and financial uncertainty abounding, it may seem like a hard sell to get execs to attend industry conventions right now. But organizers for **CTAM Summit** (Nov 9-11, Boston) are hoping that the industry sees the current situation as all the more reason to attend. "From our perspective, everyone's on guard. You're not seeing yet any real direct impact on the business. But in a week now, things could change that normally take months and months," said **Rogers** chief strategy officer *Mike Lee*, who is serving as Summit co-chair with **ESPN** svp marketing *Katie Lacey*. "This is the most content rich [Summit] itinerary I've seen since I've been working [with CTAM]. As you go into harder times, it's more important to have best practices, disciplines to weather the storm." Perhaps others feel the same. While **NAMIC** had predicted that attendance for its annual conference earlier this month would be down, it ended up attracting a record crowd of nearly 850. **SCTE's** Expo in July surpassed last year's attendance. Right now, Summit is tracking on par with last year, which drew 2700+ attendees, according to CTAM chief *Char Beales*. Beales said the extra time between last year's Summit (held in July) and this year's fall event gave everyone more time to devise "the most thoughtfully created program we've ever had." There's more focus on learning than in the past, with focus on 5 fronts: MSO marketing, network marketing, digital media, product development and business services, Lacey said. The last 2 are new tracks for Summit. Next month's gathering includes a panel looking at intl lessons learned on the quad play from **PCCW** of Hong Kong's CTO *Paul Berriman* and **France Telecom's** vp, biz dev *Jean-Marc Harion*. Tues' closing lunch session will feature Grand Tam honoree/**Cablevision** COO *Tom Rutledge* along with **Merrill Lynch's** *Jessica Reif Cohen*, **Canoe** CEO *David Verklin*, **RealNetworks'** *Rob Glaser* and **Discovery's** *David Zaslav*. This marks the last CTAM Summit before the event is combined with other cable forums, including SCTE Expo and **ACC's** Forum next fall under the "Cable Connection" week (www.cableconnectionweek.com). What Beales deemed to be an "uber committee" would meet during Summit about planning for next year's week of consolidated events in Denver. On the fun front, we hear ad agency **Events Network** will have *Ziggy Marley* perform and **MGM** will host a sneak peek of the new *James Bond* movie, "Quantum of Solace."

Competition: According to *WSJ*, **AT&T** plans to reorganize into the following 4 units: consumer, business, infrastructure and diversified business. Encompassing broadband, TV and mobile services, the telco's consumer business will be head-

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CABLEFAX DAILY (ISSN 1069-6644) is published daily by Access Intelligence, LLC ● www.cablefax.com ● fax:301/738-8453 ● Editor-in-Chief: Amy Maclean, 301/354-1760, amaclean@accessintel.com ● Exec Editor, Michael Grebb, 301/354-1790, mgrebb@accessintel.com ● Assoc Editor, Chad Heiges, 301/354-1828, cheiges@accessintel.com ● Asst VP, Ed Director, Seth Arenstein, 301/354-1782, sarenstein@accessintel.com ● Publisher: Debbie Vodenos, 240/753-5696, dvodenos@accessintel.com ● Advertising Mgr: Erica Gottlieb, 212/621-4612 ● Marketer: Doreen Price, 512/934-7857, dprice@accessintel.com ● Marketing Director: Carol Bray, 301/354-1763, cbray@accessintel.com ● Prod: Joann Fato, 301/354-1681, cdaily@accessintel.com ● Diane Schwartz/VP and Group Publisher ● Paul Maxwell/Columnist.Subs/Client Services: 301/354-2101, fax 301/309-3847 ● Group Subs : Angela Gardner, 757/531-1369, cfaxgroupsub@accessintel.com

ed by wireless chief *Ralph de la Vega*. -- Having just lost out to **AT&T** for a resale agreement with **DirecTV**, **DISH** has launched customer referral program **clubDISH**. The DBS op is offering \$50 in programming credits to existing customers for each new referred sub (up to 5/yr) plus 5 free PPV coupons. Referred subs receive free activation and an \$80 credit on their 1st bill. -- **AT&T** has launched its **U-verse Total Home DVR** in Chicago, Houston, Detroit, San Diego and Austin.

Carriage: **Broadstripe** will launch **ION TV**, **qubo** and **ION Life** in Millersville, MD. -- **SES Americom** is giving **Canby Telecom's** IPTV subs access to 36 HD nets including **Disney Channel**, **Showtime**, **Fox News**, **ESPN**, **A&E** and **Food Net**.

DTV Doings: **NAB's** DTV Trekker truck, which looks like a giant analog TV, will park inside the stadium at Sun's Redskins-Eagles game to provide info about the upcoming switch. -- **NTIA** Acting Sec *Meredith Baker* didn't throw her support Tues behind a bill that would allow broadcasters to run messages on their analog signals for a couple weeks after the DTV transition. "We feel that certainty is best at this point... Delay confuses consumers," she said on a conference call with reporters. Last week, Rep *Lois Capps* (D-CA) introduced legislation that would allow short-term, continued analog broadcast of essential info (how to upgrade TV or emergency info) after the Feb 17 transition.

Research: The good news for cable, according to **CFI Group's** '08 Telecom-Cable Industry Satisfaction Study: The avg US HH spends up to \$200/month on comm, Internet and TV services; and 60% of HHs now have bundled services, with cable owning twice as many bundled subs than do telcos. In leading the category, **Comcast** services 24% of bundled homes, **Time Warner Cable** 16% and **AT&T** 15%. The bad news? Customers prefer to bundle services with telcos over cable ops by a 2-1 margin, citing "better customer service" and "better value for the features" as primary reasons. Cable scored an "abysmal" 60 in CFI's Customer Service Index, well behind satellite (67) and telcos (66). Some individual MSO scores: **Cox** (66), **Time Warner** (60), **Comcast** (58) and **Charter** (51). Cable modem satisfaction averaged a 65. CFI said 13-17% of cable/satellite subs are likely to defect, citing too high rates, poor customer service and residence changes.

Public Affairs: **Cablevision** and **The Lustgarten Foundation for Pancreatic Cancer Research** have partnered for **curePC**, a public awareness campaign to fight pancreatic cancer. The MSO will underwrite all of Lustgarten's admin costs to ensure that every donated dollar goes directly to research, and will reach out to the public through its linear nets and Websites, in print and at venues including **MSG** and **Radio City Music Hall**. Check out www.curePC.org for more info.

Ratings: **Nielsen** delayed the release of Sat and Sun audience estimates and weekly, quarterly and monthly ratings Tues following processing errors that included incorrect audience numbers for **Fuse** on Fri and **Weather Channel** on Wed. Sat data was expected to be available late Tues. Sun and Mon data was expected to be released Wed morning. -- **Bravo** achieved in 3Q its highest-rated Q ever among 18-49s (477K) and total viewers (789K) in prime. -- **Disney Channel's** "The Suite Life on Deck" bowed Fri as the net's 4th straight live action original series to debut with more than 5mln total viewers (5.7mln). It also set net records for original premieres among 6-11s and 9-14s. -- **SNY's** Sun Mets telecast—the team's final game at Shea Stadium—garnered a 7.26 HH rating and averaged 821K total viewers to the highest-rated regular season game ever in franchise history on a RSN.

Programming: **Bio Channel's** "Bio Remembers: Paul Newman" honors the late actor Wed (9pm ET); **Turner Classic Movies** does the same Oct 12 with 24 hours of Newman movies including "Cool Hand Luke" and "Cat on a Hot Tin Roof."

On the Circuit: **Cable in the Classroom** will accept apps for its Leaders in Learning Awards now through Dec 17. Details:

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BUSINESS & FINANCE

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People: Oxygen appointed David Stefanou vp, original programming. -- Renee Plato becomes vp, digital video distribution, **Disney/ESPN Media Nets.** -- Scripps Nets' affil sales and mktg unit upped Mark Quinn to svp, national accounts and Jan Liddicoat to vp, national accounts field operations.. -- Fuel tapped Gene Pao as vp, new media and intl dev. -- Level 3 tapped Jeff Battcher as svp, corporate comm.

Business/Finance: Volatility typified a 3Q that ended Tues with the following YTD changes: **Mediacom** (+14%), **DirecTV** (+14%), **Comcast** (+7%), **Cablevision** (+2%), **Time Warner Cable** (-12%), **Verizon** (-27%), **AT&T** (-33%), **DISH** (-37%) and **Charter** (-38%). -- Charter pres/CEO Neil Smit agreed Fri to a restatement and amendment of his employment agreement (effective Jul '08) including: an extension of the term to Jun '10; an increase in salary to \$1.5mln/yr from \$1.2mln; a target bonus increase from 150% of annual base salary to 200%, and a signing bonus of \$2mln. Separately, a Charter subsidiary is offering to purchase an amount of outstanding senior notes not to exceed \$100mln in order to reduce the MSO's consolidated interest expense. -- VOD net **HealthiNation** has secured \$7.5mln in Series B funding led by **Intel Capital.** -- **AT&T** announced a strategic investment in **Zvents**, a local search engine and ad network that uses event listings to promote local businesses.

CableFAX Daily Stockwatch

Company	09/30 Close	1-Day Ch	Company	09/30 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
ALCATEL LUCENT:	3.84	0.16	AMDOCS:	27.38	2.15
BRITISH SKY:	29.70	1.49	AMPHENOL:	40.14	(0.13)
DIRECTV:	26.18	2.53	APPLE:	113.66	8.40
DISNEY:	30.69	0.96	ARRIS GROUP:	7.73	0.45
ECHOSTAR:	21.00	1.03	AVID TECH:	24.06	0.12
GE:	25.50	2.40	BIGBAND:	3.69	0.44
HEARST-ARGYLE:	22.33	0.33	BLNDER TONGUE:	1.20	0.17
ION MEDIA:	1.44	0.00	BROADCOM:	18.63	1.44
NEWS CORP:	12.15	0.08	C-COR:	11.00	0.00
MSOS					
CABLEVISION:	25.16	0.26	CISCO:	22.56	0.77
CHARTER:	0.73	(0.09)	COMMSCOPE:	34.64	1.16
COMCAST:	19.63	1.62	CONCURRENT:	5.80	(0.1)
COMCAST SPCL:	19.72	1.52	CONVERGYS:	14.78	0.56
GCI:	9.26	0.08	CSG SYSTEMS:	17.53	(1.05)
KNOLOGY:	8.07	(0.03)	ECHOSTAR HOLDING:	24.10	0.00
LIBERTY CAPITAL:	13.38	0.18	GOOGLE:	341.43	(39.57)
LIBERTY ENT:	24.97	0.74	HARMONIC:	8.45	0.25
LIBERTY GLOBAL:	30.30	2.80	JDSU:	8.47	0.54
LIBERTY INT:	12.91	0.75	LEVEL 3:	2.70	0.23
MEDIACOM:	5.92	0.03	MICROSOFT:	26.69	1.68
SHAW COMM:	20.33	0.29	MOTOROLA:	7.14	0.46
TIME WARNER CABLE:	24.20	0.55	NDS:	55.89	(1.45)
VIRGIN MEDIA:	7.90	1.06	NORTEL:	2.24	(0.12)
WASH POST:	556.76	16.76	OPENTV:	1.41	0.11
PROGRAMMING					
PHILIPS:	27.25	1.65	RENTRAK:	13.83	(0.59)
CBS:	14.58	0.28	SEACHANGE:	9.66	0.07
CROWN:	5.03	0.28	SONY:	30.87	0.11
EW SCRIPPS:	7.07	(0.38)	SPRINT NEXTEL:	6.10	0.00
GRUPO TELEVISA:	21.87	1.76	THOMAS & BETTS:	39.07	2.13
HSN:	11.01	0.67	TIVO:	7.32	0.16
INTERACTIVE CORP:	17.30	2.44	TOLLGRADE:	4.20	(0.27)
LIBERTY:	39.49	2.62	UNIVERSAL ELEC:	24.98	0.27
LODGENET:	2.03	(0.31)	VONAGE:	1.01	0.01
NEW DISCOVERY:	14.25	(0.34)	YAHOO:	17.30	0.42
NEW FRONTIER:	2.38	0.07	TELCOS		
OUTDOOR:	8.80	0.66	AT&T:	27.92	0.17
PLAYBOY:	3.94	(0.11)	QWEST:	3.23	0.05
RHI:	14.90	2.07	VERIZON:	32.09	1.47
SCRIPPS INT:	36.31	0.04	MARKET INDICES		
TIME WARNER:	13.11	0.21	DOW:	10850.66	485.21
VALUEVISION:	1.85	0.08	NASDAQ:	2082.33	98.60
VIACOM:	24.86	1.20	TECHNOLOGY		
WWE:	15.46	0.28	3COM:	2.33	0.11
TECHNOLOGY					
ADC:	8.45	0.19	ADDVANTAGE:	2.69	(0.1)



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CableFAX: The Magazine Program Awards Issue:

Ad Close and Art Due: October 8

Distribution: CTAM Summit 08, TelcoTV and CableFAX Events

Publication Date: October 29

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Contacts:

Debbie Vodenos

Publisher

(301) 354-1695

dvodenos@accessintel.com

Erica Gottlieb

Account Manager

(212) 621-4612

egottlieb@accessintel.com

www.cable360.net/events/programawards

CTAM Summit Issue