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Wednesday — October 5, 2011

What the Industry Reads First

Volume 22 / No. 192

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HERO OR TRAITOR?

Marine Sergeant Nicholas Brody just got a hero's welcome after eight years of torturous captivity in Afghanistan. But one rogue C.I.A. agent thinks he's not what he seems to be. Has he turned to the dark side... and become a terrorist himself?

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Board Room: Tackling Diversity at the Top

One area that remains a challenge for the industry is improving the representation of women and people of color on boards of directors, according to a preview of **NAMIC** and **WICT**'s employment surveys presented at a joint town hall meeting Tues. **Comcast** evp *David Cohen* admitted he used to "cringe" when he had to talk about his company's board makeup, but he feels better now that it counts 1 woman, 2 African Americans and a Hispanic-American as directors. Part of the problem, he said, is that there is virtually no turnover on boards. **Scripps Nets**' HR evp *Chris Powell* seconded that, saying the solution is to develop a slate of candidates for when one of those rare seats open up. There are signs that companies are thinking about that more. Take **Time Warner Cable**, which had the unique opportunity to create a board after its split from **Time Warner Inc.** "I think Time Warner Cable is 1 of only 2 in the Fortune 150 that has an Asian-American, Latino and African-American on our board. One-third of our board is a person of color or female," said TWC pres/COO *Rob Marcus*. In addition to there being few board openings, **Turner** evp *Kelly Regal* cautioned that the small numbers of board slots makes it easy to go from "hero to zero" with just a departure or 2. She, too, emphasized the importance of having "depth and breadth" to go to for potential candidates. **WICT** and **NAMIC** will present more from their **PAR** and **AIM** employment surveys, but in the meantime gave the industry some tidbits to chew on: the number of people of color in full-time jobs in the industry grew to 33% last year from 30% in '08 (30% at MSOs and 37% at programmers); women in full-time posts jumped to 43% vs 36% in '09 (31% at MSOs and 47% at programmers); Asian/Pacific Islanders and Hispanic/Latinos in particular are severely underrepresented relative to their numbers in the general US population. For the most part, the panel gathered at Tues' Diversity Week town hall was pleased with the progress, but believed more could be done. "The energy I'm feeling now for a focus on diversity is at an all-time high," said **Telemundo** COO *Jackie Hernandez*, pointing to the world we live in, the recent **US Census** numbers and the success people have seen from when they've embraced diversity. At her network, 98% of employees are Hispanic. That's great, but Cohen said that it's important Comcast-NBCU doesn't use that as a crutch and continue to work on the lack of Hispanics in the industry. In the best practices arena, **Discovery** sr evp, HR *Adria Alpert Romm* pointed to early career development, saying the company has found that its management execs are often home grown. That's why Discovery has created an executive



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leadership program each year featuring 25 execs—about half of whom are female and 25-30% are diverse. One of the signs of industry progress, according to **Cox** chief people officer *Mae Douglas*, is that “we don’t have to go back to the initial arguments about whether we do this or not. I’d like to give us a little bit of credit for this.”

At the Portals: With the FCC set to circulate a USF/Intercarrier Compensation order for consideration at the Oct 27 meeting, **NCTA** and **ACA** filed a joint letter at the **FCC** outlining a new proposal to the telco’s right of 1st refusal in their ABC Plan for **USF** reform. Under the ABC Plan, an ILEC would be given a right of 1st refusal in any wire center where it provides broadband to at least 35% of HHs. ACA and NCTA are strongly opposed to ROFR, but to the extent the FCC decides to include ROFR as part of its reform, the groups propose the agency establish the coverage threshold that ensures no more than \$600mIn annually in support is awarded pursuant to a ROFR. They also believe ROFR should only be awarded in areas that fall below 35% threshold, saying the current ABC proposal would award support primarily in areas where the ILEC has already built broadband facilities. Lastly, if the FCC goes for ROFR, it should be awarded for a shorter period of time than the 10-year period proposed in the ABC Plan—no more than 6 years, NCTA and ACA said.

Icecapades: **NHL Net** is no longer carried by **AT&T U-verse TV**, the victim of weekend darkness after the telco said it tried but was unable to reach a fair, long-term deal with the net it had delivered to U450 and sports tier subs. The NHL season begins Thurs. “We are always open to considering a fair and detailed proposal from NHL Network,” said the telco. The channel declined comment. -- **In Demand** and the **NHL** are offering an 18-day free preview of out-of-market games package **NHL Center Ice** from Oct 6-23 via at least 9 multichannel ops including all the big cable MSOs.

Carriage: **Comcast Xfinity TV** expanded its distribution of **Outdoor Channel** in New England to include Digital Preferred subs throughout MA, CT, NH and VT. The move coincides with the launch of fall hunting season.

NAMIC Breakfast: The few minorities in the C-suites shouldn’t be surprising since there aren’t a lot of C-level positions, **NCTA** pres/CEO *Michael Powell* said Tues at the **NAMIC** breakfast recognizing the **CableFAX 2011 Most Influential Minorities in Cable**. “There is only 1 CEO at a company,” he said. “There’s a smaller population set [that meets those skills].” Powell, however, did criticize a lot of industries for is not taking a more active role in mentoring, identifying and cultivating talent at an early stage. When he looked around NCTA’s office, something was missing—the interns. “We are deficient in our responsibilities,” he said. Turns out there were 3 interns at NCTA over the summer, but no one had told him about them. He had a 2-hour, brown bag lunch with them and follow-ups. “Now, next year, we better have at least 10,” he said. Powell said that the industry continues to make diversity progress, but that diversity is a journey. He said he still struggles with answering what it means to be the 1st person of color to run the NCTA. But he spoke about being a leader to everyone while

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still being faithful to your community. -- Once again, the breakfast was sold out, with more than 300 attendees. Outgoing NAMIC pres *Kathy Johnson* got a standing ovation (2 more were given at the NAMIC gen session).

Advertising: **Cox** signed on to use **Visible World's** targeted ad tech to deliver more relevant offers to its more than 6mln video, voice and HSD subs. The MSO has applied the tech's audience demo data to identify who will find specific spots or versions relevant and ultimately change parts of entire spots.

Measurement: **Scripps Nets**, **Cox Media Group** and the **NHL** are among the initial users of **Crowd Science's** Citrus, an audience measurement, segmentation and targeting platform for publishers. A 1st-party solution using publishers' own data, Citrus allows users to dev their own unique audience insights and build custom ad segments.

NAMIC Notebook: Cable can't lose sight of economics as it tests new platforms and ways of providing content to consumers, said *Henry Ahn*, **Scripps Nets Interactive** evp, content distribution and marketing. "There's got to be a monetization of the activities we do, especially on the content side," he said, arguing that calls for smaller program packages and even individual a-la-carte offerings must not overlook economic realities. "When you add it all up, the value proposition on a la carte is so inferior that I don't think it's what consumers want." -- The need to better reflect in shows the diversity of modern TV viewers "in a world in which there are so many choices" comes down to competitiveness, said *Shana Waterman*, **Fox Broadcasting** vp, current programming. "It's not like when we had the 'Cosby Show' and could pull a 40 share," she noted. "When we get an 11 or 12 share, we're doing the happy dance." *Melissa Sykes*, vp, content diversity at **Scripps Networks Interactive**, said nets have little choice but to focus on diversity. "I think the risk is not doing it," she said. "You're never going to be competitive if you don't move forward." *Maureen Guthman*, **TV One** svp, program strategy & acquisitions, said niche nets must focus on quality that matches or exceeds that on broader based nets. "There's a perception that if it's just for this group of people and not for a wider audience, then it's not as good," she said. Meanwhile, when diverse stars do cross over into the mainstream, "the advertising community is listening," noted *Maria Perez-Brown*, svp, programming & development, **nuvoTV**. "You want it to resonate, so people are going to watch" even beyond the core audience, she said. At **Disney-ABC**, which often gets kudos for diverse content at its various nets, svp, diversity *Robert Mendez* said the company doesn't require diversity but demands relevant content—and the rest tends to work itself out. "We don't do mandates," he said. "They don't work. But if it's organic, things are different... We like to be ahead of the curve, progressive, smart... all of those characteristics line up with diversity... Diversity isn't just for people of color. It's for everybody." -- The overarching takeaway from a panel of recruiters and career coaches discussing social media platforms was this: they're a tool for creating your online identity, and they're most definitely used by recruiters. Especially **LinkedIn**. In fact, said *Tyler Benjamin*, vp, global talent management, **Discovery Comm**, not having a LinkedIn profile can be a red flag. And if resumes don't match a candidate's LinkedIn profile, that's another red flag. More than anything, said *Cheryl Palmer*, exec career coach and resume writer, **Call to Career**, "It's used as a vetting tool. It can rule you in or rule you out." According to *Erin Hand*, vp, talent & dev, **Cox Comm**, it's important to delineate your skill sets on LinkedIn so you're sufficiently searchable. "Be very specific and explicit about your strengths, as you would be on your resume," she said. Note

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BUSINESS & FINANCE

to the Boomers out there, who may not be comfortable releasing info into cyberspace: "If you don't have information online, you could be excluding yourself from opportunities," Palmer warned. At the same time, be wary of oversharing, a talent millennials have mastered. A few caveats: think before you post and make sure your LinkedIn profile is complete. If it's not, you're sending the message that you're not detail-oriented.

Ratings: ESPN posted its most-watched fiscal year for the 4th straight year by averaging 1.07m total viewers on a 24-hour basis, up 1.8% YOY. The net's 0.9 total-day rating over the last 12 months ties its historical record set in 1990 and '10. -- **Showtime's** new drama "Homeland" delivered 1.1m viewers for its premiere, while the 6th-season bow of "Dexter" garnered 2.2m viewers, up 24% YOY and marking the show's best premiere ever. -- **Disney Channel's** original comedy "Jessie" launched as the net's most-watched Fri premiere in 3 years by delivering 4.6m P2+, 2.3m kids 6-11 and 1.8m tweens 9-14.

People: NBC Sports Group named Greg Hughes svp, comm. -- TV One tapped Kenetta Bailey as evp/CMO, effective Oct 10.

Business/Finance: E.W. Scripps agreed to acquire for \$212m the McGraw-Hill TV station group comprised of 4 ABC affils in markets including San Diego and Denver and 5 Azteca America affils.

CableFAX Daily Stockwatch

Company	10/04 Close	1-Day Ch	Company	10/04 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
DIRECTV:	41.55	0.95	BLNDER TONGUE:	1.15	0.02
DISH:	24.80	1.18	BROADCOM:	33.31	1.19
DISNEY:	29.86	0.86	CISCO:	15.58	0.45
GE:	14.86	0.17	CLEARWIRE:	2.15	(0.27)
NEWS CORP:	15.64	0.43	CONCURRENT:	4.78	(0.39)
			CONVERGYS:	9.10	0.49
MSOS			CSG SYSTEMS:	12.52	0.18
CABLEVISION:	15.88	0.86	ECHOSTAR:	22.42	1.27
CHARTER:	45.10	1.43	GOOGLE:	501.90	6.38
COMCAST:	21.17	0.81	HARMONIC:	4.27	0.38
COMCAST SPCL:	20.94	0.77	INTEL:	21.22	0.60
GCI:	8.13	0.64	JDSU:	9.55	0.56
KNOLOGY:	13.10	0.78	LEVEL 3:	1.42	0.01
LIBERTY CAPITAL:	62.82	1.71	MICROSOFT:	25.34	0.81
LIBERTY GLOBAL:	34.06	0.32	MOTOROLA MOBILITY:	37.87	0.16
LIBERTY INT:	13.97	(0.2)	RENTRAK:	13.45	1.88
SHAW COMM:	19.34	(0.25)	SEACHANGE:	8.13	0.79
TIME WARNER CABLE:	64.98	2.19	SONY:	18.80	0.69
VIRGIN MEDIA:	23.71	0.30	SPRINT NEXTEL:	2.86	0.13
WASH POST:	320.00	6.25	THOMAS & BETTS:	40.59	2.44
			TIVO:	9.38	0.51
PROGRAMMING			UNIVERSAL ELEC:	17.69	1.93
AMC NETWORKS:	30.99	(0.47)	VONAGE:	2.57	0.05
CBS:	19.59	0.64	YAHOO:	14.46	0.93
CROWN:	1.30	(0.01)			
DISCOVERY:	37.75	1.02	TELCOS		
GRUPO TELEvisa:	19.45	1.17	AT&T:	28.31	0.15
HSN:	32.07	0.82	VERIZON:	36.40	0.06
INTERACTIVE CORP:	36.98	(0.9)			
LIBERTY STARZ:	59.94	(1.54)	MARKET INDICES		
LIONSGATE:	7.08	0.24	DOW:	10808.71	153.41
LODGENET:	1.53	(0.02)	NASDAQ:	2404.82	68.99
NEW FRONTIER:	1.07	(0.02)	S&P 500:	1123.95	24.72
OUTDOOR:	5.77	0.59			
SCRIPPS INT:	36.35	0.20			
TIME WARNER:	30.05	1.09			
VALUEVISION:	2.39	0.29			
VIACOM:	46.34	0.43			
WWE:	9.47	0.65			
TECHNOLOGY					
ADDVANTAGE:	2.11	(0.02)			
ALCATEL LUCENT:	2.37	(0.05)			
AMDOCS:	26.72	0.71			
AMPHENOL:	41.04	1.24			
AOL:	12.18	0.78			
APPLE:	372.50	(2.1)			
ARRIS GROUP:	10.55	0.64			
AVID TECH:	7.66	0.16			
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GUEST COLUMNIST

Cable's On Demand Effort Highlights Influential Hispanics

by Denise Myers, Cox Communications

Hispanic Heritage Month and cable's Diversity Week provide the perfect opportunity to look at compelling people and events in Hispanic history, and examine how Hispanic culture has contributed to the fabric of our nation. And it's also the right time to study the demographics and emerging trends in TV viewership among this population too.

Over the last decade, the U.S. Hispanic population has grown by more than 40 percent and now represents 16.3 percent of this country's population, according to the U.S. Census Bureau. So it's fitting that CTAM's Advanced Cable Solutions Consortium (ACSC) seized the opportunity to launch its first "Hispanic Heritage Month On Demand" PR effort, promoting nearly 40 hours of Hispanic-themed programming cable's On Demand platform.

Cox Communications is proud to be a partner in this CTAM initiative, along with the League of United Latin American Citizens (LULAC). As a partner, LULAC is sharing information about "Hispanic Heritage Month On Demand" and cable's associated programming through its social media and other traditional communication channels with its more than 200,000 members. Viewers who wish to explore the cross-section Hispanic-themed On Demand programming being offered can visit www.thisiscable.com.

With the Hispanic population ages 25-54 years expected to increase 12 percent and outpace all other demos in the next five years, this population's growth has a major influence on the future of television and marketing. And now for the first time, a CTAM study*, "Tracking How Entertainment, Demographics and Technology have changed in the U.S.," extracted data specific to the burgeoning U.S. Hispanic population. This is what we've learned.

On Demand use has increased over the past year, with almost two-thirds (65%) of digital cable households ordering

On Demand programming compared to 61 percent in 2010. A significant number of our Hispanic customers demand it, too. 61 percent of Hispanics ordered an On Demand program in 2011. Hispanics also represent a new wave of technophiles with 69 percent stating that they are likely to stream content, like movies and music, compared with only 55 percent of total households. 63 percent of Hispanics are interested in watching movies on tablets while only 36 percent of total households share those sentiments. In addition, 59 percent of Hispanics are interested in watching TV programs compared to 35 percent of total households.



Denise Myers

Hispanics are emerging as extreme entertainment enthusiasts. We now know that in a variety of programming genres—such as sitcoms and comedies, sports, reality competitions, and children's programming, Hispanics watch programs more frequently on a TV set than total households. Studies like these yield clarity to the picture of our world tomorrow. It's becoming apparent that the vast numbers of emerging technologies are changing the landscape along with the human dynamics and demographics of the U.S. marketplace.

It's imperative that we—content providers, cable companies and suppliers—arm ourselves with consumer insights, and work together to meet shifting marketplace demands and build our businesses. This process begins inside the ACSC initiatives, continues at the CTAM in NY conference, and flourishes when tomorrow's innovators return to their respective companies ready to rethink what's possible. I look forward to seeing you at CTAM in NYC and working with you in the future.

Denise Myers is dir, On Demand and PPV marketing, Cox Comm and co-chair, marketing strategies committee, CTAM Advanced Cable Solutions Consortium (ACSC).

**The Hispanic sample was based on a phone survey conducted by CENTRIS as part of the CENTRIS omnibus survey conducted from July 18-Aug. 31. This sample includes 366 randomly selected Hispanic consumers age 18+. This sample has a +/-5.3 percentage point margin of error.*



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