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Monday — October 17, 2011

What the Industry Reads First

Volume 22 / No. 200

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Still Paddling: Timko Talks About Canoe's Future With Her at the Helm

Canoe Ventures COO Kathy Timko sat down with **CableFAX** for her 1st interview since being named interim CEO of the cable-owned jv for advanced advertising. From David Verklin's departure over the summer to questions over the venture's progress, there's plenty for Timko & team to address as they move forward with new initiatives. Her mandate over the next 12-18 months, she said, is to scale the iTV platform both in terms of HHs and networks as Canoe expands its iTV portfolio and launches VOD dynamic ad insertion. **There has been a lot of speculation about Canoe's future. Set the record straight.** Certainly Canoe is in a bit of a fishbowl so there are a lot of people always commenting. Canoe represents such a great opportunity in the marketplace, and that kind of opportunity comes with an enormous amount of complexity. It requires tremendous collaboration, coordination and communication... From my perspective, Canoe is really a technology company enabling advanced advertising and advanced television, and that's bringing engagement, relevance and enhanced reporting and analytics to the marketplace. We have the largest iTV platform available and it's growing... Our 1st application has been RFI and we have polling and trivia in the marketplace in a trial. There are variations and enhancements to RFI coming. The next round of applications will be with VOD Dynamic Ad Insertion (DAI)... I'm pumped for the future. **Has industry support whittled at all since launch?** We hear criticism, but it's quickly followed up by words of support. To be candid, we've faced a lot of challenges. I think some of what we do has been harder [than people anticipated], but we've accomplished so much. We have an interoperable platform that's north of 22mln HHs and it actually works. We've faced challenges, but anything that's a big opportunity is going to be difficult. I'm not worried about that because Canoe is all about scale—and that just doesn't happen overnight. I think we can start to accelerate that progress now that some of the platform is in place and being exercised. **So does that mean Canoe is about to pick up steam?** Canoe's owners are very committed to signing up networks. National advertisers are starting to use our iTV products. We're putting VOD DAI into the marketplace in trials, so you're going to start to see more different things coming from Canoe soon. **What sort of reactions are agencies giving Canoe?** They've been really terrific partners. They want more and they want it yesterday. Terrific meaning that... they push you to the next level. They represent a segment of the market we have to really listen to, and we're working with them. **What's the significance of VOD DAI?** VOD advertising

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really represents numerically in a quantifiable way a really big opportunity for Canoe and our stakeholders. There were 8bln VOD transactions last year—about 3.5bln hours of content. Those are big numbers. That's a lot of attentive, choice-based, engaged eyeballs that are currently going unmonetized.

CableLabs Search: The search is on for a new **CableLabs** CEO with the organization announcing that Dr *Paul Liao* has decided not to renew his contract when it expires in Dec '12 due to personal reasons. Liao joined CableLabs in July '09 as the successor to longtime pres/CEO *Dick Green*. Seems like it's standard for the board to have a year lead-time as it was the similar when Green's Dec '09 retirement was announced in Sept '08. Liao will help with the transition. "Although Paul has been with CableLabs for a relatively short period of time, his contributions have been great and include establishing new programs that are helping the industry grow its broadband and commercial businesses, as well as drive cable's ability to provide services to smart CE devices using IP technology," said **Time Warner Cable** chmn/CEO *Glenn Britt* and CableLabs board chmn. Liao's contributions also include opening a 2nd office for CableLabs in the financial district of San Fran, giving CableLabs a home in the middle of software culture as well as at its Louisville, CO, HQ.

OTT: **Google** CEO *Larry Page* remained vague about **YouTube's** content future during a Thurs conference call—the *WSJ* has said the company plans to spend approx \$100mln on original content for the site—but he's clearly amped about its future prospects. "It's growing gangbusters in every way," said Page. "I think that we've had very, very successful models for a long time without owning content. And I think many of the models of you see don't involve people owning content but actually selling it or distributing in various ways. And I expect that will continue."

At the Portals: The **FCC** issued an NPRM seeking comment on whether to retain the basic service tier encryption prohibition for all-digital cable systems. It has tentatively concluded that allowing ops to encrypt the tier in all-digital systems will not substantially affect compatibility between cable service and CE equipment for most subs. The exception might be subs who only subscribe to digital basic and are able to do so without using a set-top or similar equipment or who only don't have boxes on secondary TVs. Thus, the FCC has tentatively concluded that operators who choose to encrypt basic in an all-digital system comply with certain consumer protection measures for a limited time to minimize subscriber disruption. Cable likes the idea because it believes it would speed the transition to digital, allow ops to remotely activate and deactivate a service without a service call and reduce truck rolls. -- Recall how the **FCC** Media Bureau ordered **MSG** and **Cablevision** to make HD versions of **MSG** and **MSG+** available to **AT&T** and **Verizon** last month? As promised, CVC and MSG filed a petition for stay and review of the order. The Bureau had ordered licensing the programming by Oct 22. The Bureau said last week that it will keep that deadline for reaching an agreement with the telcos, but would stay the order to the extent it would require MSG to make the programming available for carriage on AT&T and Verizon on or before Nov 14. The Bureau said it was taking the action to give the FCC time to consider Cablevision's petition.

Unblocked: Joint owners including **Comcast**, **Disney** and **News Corp** have pulled **Hulu** off the auction block following reported bids from interested parties such as **Google** and **DISH**. "Since Hulu holds a unique and compelling strategic value to each of its owners, we have terminated the sale process and look forward to working together to continue mapping out its path and even greater success," read a statement. As of early July, the site counted approx 875K **Hulu Plus** subs. **Miller Tabak's** *David Joyce* noted how Hulu's ownership structure is marked by divergent opinions on windowing and ads, but said the site "should survive as monetization is increasing, but it might need a more consensus approach toward content availability and advertising."

VOD: **Time Warner Cable's** closing the traditional film windows by offering "Trespass" (Oct 14, \$6.99) and "Margin Call" (Oct 21, no pricing yet) via on demand the same day they hit theaters, plus "Melancholia" (\$9.99) before it opens on Nov 11.

Programming: **HBO** renewed "Boardwalk Empire" for a 3rd season. -- **Current TV** had been looking for a show/personality to schedule after "Young Turks" and "Countdown with Keith Olbermann," and the winner is "The War Room with Jennifer Granholm." Featuring the former MI gov and set to launch in Jan, the hour-long show will spotlight daily news with in-studio commentary by political insiders, campaign vets and opinion leaders. -- **Syfy** picked up "Haven" for 13-ep 3rd season ('12). -- **Disney** announced a new pilot, "Zombies and Cheerleaders," a musical about an otherwise typical high school boy who also happens to be a zombie. Production is scheduled to begin in Dec with a planned 2012 debut.

CableFAX Week in Review

Company	Ticker	10/14 Close	1-Week % Chg	YTD %Chg
BROADCASTERS/DBS/MMDS				
DIRECTV:	DTV	47.03	8.04%	17.78%
DISH:	DISH	27.50	5.04%	39.88%
DISNEY:	DIS	34.47	8.74%	(8.1%)
GE:	GE	16.60	7.10%	(7.31%)
NEWS CORP:	NWS	17.29	6.07%	5.30%
MSOS				
CABLEVISION:	CVC	18.11	10.63%	(46.48%)
CHARTER:	CHTR	49.04	5.17%	25.94%
COMCAST:	CMCSA	23.94	8.52%	8.97%
COMCAST SPCL:	CMCSK	23.66	8.28%	13.70%
GCI:	GNCMA	9.35	17.91%	(26.15%)
KNOLOGY:	KNOL	14.15	9.86%	(9.47%)
LIBERTY CAPITAL:	LCAPA	76.36	17.08%	22.06%
LIBERTY GLOBAL:	LBTYA	39.84	10.39%	12.61%
LIBERTY INT:	LINTA	15.59	4.84%	(1.14%)
SHAW COMM:	SJR	21.00	4.12%	(1.78%)
TIME WARNER CABLE:	TWC	69.82	3.41%	5.74%
VIRGIN MEDIA:	VMED	26.38	8.16%	(3.16%)
WASH POST:	WPO	348.46	5.49%	(20.71%)

Company	Ticker	10/14 Close	1-Week % Chg	YTD %Chg
PROGRAMMING				
AMC NETWORKS:	AMCX	32.55	(0.25%)	(18.32%)
CBS:	CBS	23.59	9.67%	23.83%
CROWN:	CRWN	1.50	4.90%	(42.75%)
DISCOVERY:	DISCA	41.76	9.64%	0.14%
GRUPO TELEVISIA:	TV	20.19	5.21%	(22.14%)
HSN:	HSNI	35.10	8.47%	14.52%
INTERACTIVE CORP:	IACI	41.76	8.07%	45.51%
LIBERTY STARZ:	LSTZA	63.97	6.40%	(3.78%)
LIONSGATE:	LGF	7.29	5.50%	11.98%
LODGENET:	LNET	1.99	24.38%	(53.18%)
NEW FRONTIER:	NOOF	1.15	7.48%	(39.15%)
OUTDOOR:	OUTD	7.05	9.47%	(1.67%)
SCRIPPS INT:	SNI	41.82	10.28%	(19.19%)
TIME WARNER:	TWX	33.53	8.69%	4.23%
VALUEVISION:	VVTV	2.95	23.95%	(51.72%)
VIACOM:	VIA	51.79	6.43%	12.93%
WWE:	WWE	9.92	11.34%	(30.34%)

Company	Ticker	10/14 Close	1-Week % Chg	YTD %Chg
TECHNOLOGY				
ADVANTAGE:	AEU	2.14	(0.93%)	(31.85%)
ALCATEL LUCENT:	ALU	3.09	19.31%	4.39%
AMDOCS:	DOX	29.79	7.51%	8.45%
AMPHENOL:	APH	44.15	8.29%	(16.35%)
AOL:	AOL	14.09	10.86%	(40.57%)
APPLE:	AAPL	422.00	14.12%	30.83%
ARRIS GROUP:	ARRS	11.42	2.70%	1.78%
AVID TECH:	AVID	8.42	2.06%	(51.78%)
BIGBAND:	BBND	2.26	83.74%	(19.29%)
BROADCOM:	BRCM	37.93	7.54%	(12.9%)
CISCO:	CSCO	17.55	5.34%	(13.25%)
CLEARWIRE:	CLWR	1.59	14.39%	(69.13%)
CONCURRENT:	CCUR	4.75	4.40%	(6.13%)
CONVERGYS:	CVG	10.41	13.03%	(20.96%)
CSG SYSTEMS:	CSGS	14.13	11.52%	(25.4%)
ECHOSTAR:	SATS	24.93	8.72%	(0.16%)

Company	Ticker	10/14 Close	1-Week % Chg	YTD %Chg
GOOGLE:	GOOG	591.68	14.86%	(0.39%)
HARMONIC:	HLIT	4.78	9.13%	(44.22%)
INTEL:	INTC	23.50	5.43%	11.75%
JDSU:	JDSU	10.91	8.45%	(24.65%)
LEVEL 3:	LVLTL	1.65	(2.37%)	68.37%
MICROSOFT:	MSFT	27.27	3.89%	(2.29%)
MOTOROLA MOBILITY:	MMI	38.72	2.11%	33.06%
RENTRAK:	RENT	14.37	17.21%	(52.35%)
SEACHANGE:	SEAC	8.38	5.01%	(1.99%)
SONY:	SNE	20.17	10.52%	(43.52%)
SPRINT NEXTEL:	S	2.79	15.77%	(34.04%)
THOMAS & BETTS:	TNB	45.09	4.98%	(6.65%)
TIVO:	TIVO	10.38	8.69%	20.28%
UNIVERSAL ELEC:	UEIC	19.63	14.46%	(30.81%)
VONAGE:	VG	2.90	11.97%	29.46%
YAHOO:	YHOO	15.91	20.80%	(4.33%)

Company	Ticker	10/14 Close	1-Week % Chg	YTD %Chg
TELCOS				
AT&T:	T	29.17	2.57%	(0.71%)
VERIZON:	VZ	37.33	3.24%	4.33%

Index	Value	% Chg	% Chg	
MARKET INDICES				
DOW:	DJI	11644.49	4.88%	0.58%
NASDAQ:	IXIC	2667.85	7.60%	0.56%
S&P 500:	GSPC	1224.58	5.98%	(2.63%)

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. BIGBAND:	2.26	83.74%
2. LODGENET:	1.99	24.38%
3. VALUEVISION:	2.95	23.95%
4. YAHOO:	15.91	20.80%
5. ALCATEL LUCENT:	3.09	19.31%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. LEVEL 3:	1.65	(2.37%)
2. ADVANTAGE:	2.14	(0.93%)
3. AMC NETWORKS:	32.55	(0.25%)
4. BLNDER TONGUE:	1.26	0.80%
5. AVID TECH:	8.42	2.06%

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