

CableFAX Daily™

Tuesday — October 19, 2010

What the Industry Reads First

Volume 21 / No. 202

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Me and My TV: Interactive Cable Content a Hot Button Issue

The overflow crowd Mon at CTAM Summit's interactive ad panel illustrated the interest this new rev opportunity engenders. **Canoe Ventures** is now live with multiple programming partners, and although its initial goal of a 25mln-home footprint is still a few months away, cable appears ready to capitalize on EBIF apps in a meaningful way. "EBIF as a platform is poised very well," said **Cox** vp, video strategy and product management *Steve Necessary*. Still, there's much work to be done. "It's harder than I thought," said **Canoe** COO *Kathy Timko* of the co's intent to homogenize interactive ad content across a heterogeneous set of the 6 largest MSOs. "It's important to remember that interactive ads can't make bad content good, but if used ineffectively [they] can make good content look bad." A few initial findings hint at the opportunities. Approx one-fifth of consumers with access to interactive content within programming will use it, said **Ensequence** pres/COO *Peter Low*, noting that those users spend approx 15min interacting. And Timko said applying an RFI app to a 30sec spot leads to a 130%+ increase in brand recall and makes ads 50% more memorable. Also, when adding polling/trivia functionality, brand recall jumps 167%+ and intent to purchase approx 40%. "The permutations can be really explosive," said Timko. Added Low: "There is absolutely a correlation between interactivity and ratings." But with interactive cable ads still in their infancy, panelists offered a few pointers. For one, programmers and ops must still agree on both what the model will look like and how best to monetize it, said Low. **Weather Channel** evp, distribution and business dev *Jennifer Dangar* said breaking through the ad clutter remains critical, and noted opt-in functionality as an "incredibly valuable asset" with which to accomplish that goal. *Lisa Meier*, a vp, sales for **Time Warner Cable** cautioned stakeholders to really listen to customers about how they'd like to interact with programming and when. Also, she said, forging a knowledgeable sales force is critical. Or, as she said, it's about "transforming digital posers into real digital soldiers." But as multiplatform interactivity is an effective and growing trend, Necessary said it's important to remember that "the benefit [of interactivity] is enhancing the TV experience. Job one is to enhance that experience." -- So what do showgoers view as a cool interactive app? Of 5 companies that competed for the CTAM Summit Get Interactive! Awards through short presentations of their apps, **Starz's** Watch Now tech received the most votes. An on-screen prompt allows viewers to either start a program over if they engage after its beginning, scroll through available movies on Starz VOD and view the net's upcoming sched-



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*The Nielsen Company, cable coverage universe estimates, Households, September 2010

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, 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, 301.354-1695, dvodenos@accessintel.com ● Assoc Publisher: Amy Abbey, 301.354.1629, aabbey@accessintel.com ● Marketing Dir: Carol Brault, 301.354.1763, cbrault@accessintel.com ● Prod: Joann Fato, 301.354.1681, cdaily@accessintel.com ● Diane Schwartz/VP and Group Publisher ● Subs/Client Services: 301.354.2101, fax 301.309.3847 ● Group Subs: Carol Brault, 301.354.1763, cbrault@accessintel.com

ule. **Showtime's** MMA/Boxing-related app that allows fight fans to obtain on-screen fighter stats/bios, trivia and live polling also scored well, as did **HSN's** self-explanatory Shop by Remote option that **Comcast** is currently using.

Cablevision-Fox: It looked like "House" and other **Fox** programming would come and go Mon night without airing on **Cablevision**. Fox said the parties talked again "briefly" Mon morning, but no significant progress was made. "It is increasingly clear that Cablevision's real intention is to continue making this their subscribers' problem in the hope that with enough inconvenience, politicians will intervene to protect Cablevision's huge profits—nearly \$795 per subscriber last year," Fox said, saying that the MSO's calls for arbitration is not a "serious solution" as it believes Cablevision would never agree to arbitration for **MSG**. The programmer said MSG never sought arbitration after it went dark from **DISH** earlier this month. Fox also called Cablevision's claim that it is seeking \$150mln in fees, up from \$70mln, untrue. Cablevision continued to pound the arbitration hammer. "When broadcasters like **News Corp** remove their signals, they hurt viewers in an attempt to gain business leverage," said a statement late Mon from *Charlie Schueler*, CVC's evp, communications. "Cablevision agrees to submit to binding arbitration, as called for by more than 50 elected officials from NY, NJ and CT as the fastest and fairest way to return Fox programming to Cablevision viewers. We call on News Corp to do the same." Sens *Frank Lautenberg* (D-NJ) and *Robert Menendez* (D-NJ) called on the **FCC** Mon to take immediate action to help resolve the dispute, which has meant the loss of **WNYW** (NY channel 5), **WWOR** (NJ channel 9) and **WTXF** (Philadelphia channel 29) for Cablevision. They also asked the Commission for a timeline to be established for the review and modification of current retrans rules. Despite being dark on Cablevision, Games 1 & 2 of **NLCS** on Fox averaged a 4.7 HH rating/8 share, a 27% improvement over the first 2 games of the series on **TBS** last year. Game 1's 4.3 rating was flat with last year's game on TBS, but Game 2's 5.3 was up 83% over last year's, Fox said. -- While reports Sat that Fox briefly pulled its online content from the Cablevision footprint drew an outcry from Rep *Ed Markey* (D-MA) and consumer groups like **Free Press**, **BTIG's** *Rich Greenfield* believes broadcasters can't demand more for retrans while putting content up for free. "There is nothing illegal about preventing access to a given website unless a multichannel operator pays for access to a particular website for all of their subscribers," Greenfield wrote in a blog post, saying the problem is that CVC broadband only subs "essentially became the collateral damage of a TV-based dispute." Over the coming year, he expects most free online broadcast content to be delayed by weeks, if not months (unless there is authentication through an MVPD).

Advertising: **Magna Global** upped its overall '10 ad revenue forecast to +2.8% on a normalized basis (excluding local TV political and network Olympic ads) vs a previous expectation of 2.1% growth. TV remains the largest ad platform, led by national cable, whose advertising revenue grew by 13.4% in 2Q, and local TV, which rose by 16.7%. Those growth rates should continue through the year, the firm said. **ZenithOptimedia** also upped its forecast for global ad

There's a million ways to describe **Adam Richman** on **Man v. Food**, but only one place to find him.

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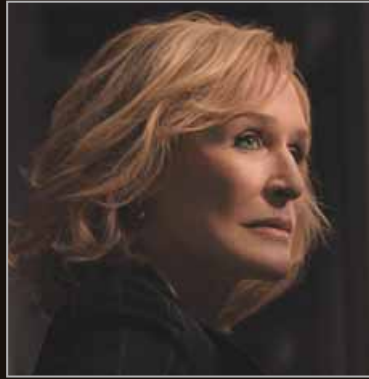
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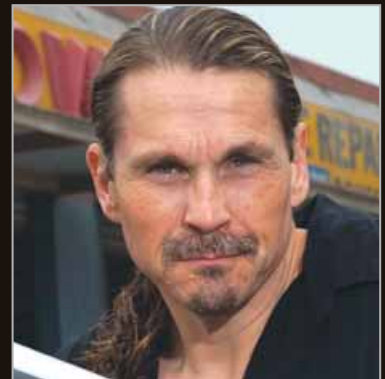
BEST ACTOR
IN CABLE/PLATINUM

RON PERLMAN

BEST WRITER

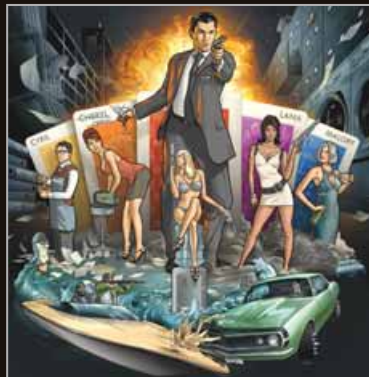
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growth to 4.8% from 3.5%. It expects cable to come in about 8% higher than '09 and sees gains of 9% and 7% in '11.

Competition: AT&T launched its **U-Verse** Mobile service on several Android devices, including the **Samsung** Captivate, as well as the **Blackberry** Curve 3G. U-verse Mobile is an app that lets U-verse TV subs browse their program guide, schedule and manage their DVR recordings, and for subscribers with qualifying TV plans, download hit TV shows over any Wi-Fi connection, and watch them on their qualifying smartphone from anywhere.

At the Portals: Mon was the deadline for **Comcast** and **NBCU** to get back to the **FCC** Media Bureau with more info and documents regarding their proposed marriage (**Cfax**, 10/5). Many of the questions dealt with recent programming agreements the 2 had reached with other distributors. Those responses were of course redacted from the public filing. There were a few snippets here and there that weren't blacked out, including Comcast saying it did not institute any subscriber acquisition plans related to the **DISH-Fisher** retrans dispute (Dec '08-June '09).

Carriage: The **Africa Channel** expanded into **Comcast's** Central and Northern CA systems, including Chico and Stockton. -- HD net **Sony Movie Channel** inked deals with **DirectTV** (HD Xtra Pack) and **AT&T U-Verse** (HD Premium Tier). It already had a deal with **DISH**, which began offering the premium HD tier net to all subs free for a 1 month on Mon.

Online: Looks like **ESPN** will begin streaming its flagship channel on **Time Warner Cable** as early as Mon, all part of the TV Everywhere model. "Time Warner Cable customers who subscribe to a video package containing ESPN will have online access, at no additional charge, to a wide variety of programming, including live events," a spokesperson said. Customers can register for the service through <http://myservices.timewarnercable.com>. Online service **ESPN3** should also launch around the same time, with any TWC sub who has ESPN getting access to it (regardless of where they get their broadband service from).

CTAM Notebook: It was clear **CTAM** wanted to build on the enthusiasm of the Transactional Movies on Demand (TMOD) campaign it helped lead recently, and panelists at a session on VOD's future late Mon took the cue. The campaign's positive results received praise from researchers and studio execs alike, with **20th Century Fox** svp **Aubrey Freeborn** urging the industry and the studios to build on the momentum of the campaign. Indeed **Frank N. Magid Assoc** vp **Jill Rosengard Hill** said the effort between 8 MSOs and 8 studios to encourage cable subs to use VOD to consume films did just that, with two-thirds of cable subs saying they used movies on demand, up 12% from before the campaign. The campaign's ads green MOD logo was a major plus, Freeborn said. We didn't have anything like that before, she said. On the operator side, **Time Warner Cable** vp **Judi Allen** revealed navigation strategies the MSO is testing to offer MOD in 3D. She also noted a slew of innovations for 11 to ease navigation for consumers. Presently, you have to be pretty smart as a consumer to find the movie on demand you want, she admitted. Allen showed a series of slides indicating interfaces would feature extensive use of box and studio art. There will also be screens where consumers can type in titles and where similar titles will be suggested to the consumer. Besides better navigation, the MSO also plans to offer an on demand portal, where metadata will offer films by actors names, directors names, etc, she said. -- As cable operators

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Deadline: November 5, 2010 • Enter Online: www.CableFAX.com/BOW • Event: Spring 2011

Enter as many categories as you like, but please tailor your entry to the category you are entering.

Campaign Categories:

- Ad/Series of Ads
Blog or Series of Blogs
Community/Social Networking
Contest/Online Games
Corporate Social Responsibility/Education
Digital Marketing Campaign
Digital PR Campaign
Editorial Excellence - Overall
Editorial Excellence - Special Section
Email Newsletter/s
Smartphone App
Tablet App
Original Content
Podcast or Videocast
Social Media Campaign
Supplemental Web Content
Use of Facebook
Use of Twitter
Use of Geo-Location (FourSquare, Gowalla, etc)
Use of Video
Virtual Tradeshow or Online Event
Web Site Design
Web Site Redesign

People Awards:

- Blogger/Tweeter/Social Networking Facilitator
Digital Executive (Below VP)
Digital Hot List (VP and above)
Video Editor/Producer
Web Content Director
Other (please enter an executive who is successfully leading your organization's digital initiatives)

Best Websites:

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Cable Network - Large (More than 50mln subs)
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Category definitions, FAQs, a list of last year's winners, and to enter online at www.CableFAX.com/BOW

Compiling Your Entry (Visit www.CableFAX.com/BOW for full details)

What to Send

At the beginning of your 2-3 page synopsis, include the following information for all categories:

- Category entered • Title of entry • Key contact for entry • Organization submitting entry

Supporting Materials

- URL/Web address(es) • Clippings • Photographs • Magazines • E-letters • Newsletters • Testimonials • Print-outs of Web Pages

How To Enter: Use this form or visit www.CableFAX.com/BOW for additional category information and to enter online.

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Deadline: November 5, 2010
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Event: Spring 2011

Entry From (All information required)

Title of Entry/Name of Entrant (as you'd like it to appear on your award if selected):
Company and/or Client:
Contact Name of person submitting entry Job Title:
Address:
City: State: Zip:
Telephone of Contact: Fax of Contact:
Email Address (Required):

Entry Fees

- Primary entry: \$300 each \$300 each \$
Secondary entry of same campaign** into one or more categories: \$175 each \$175 each \$
Late entry fee: \$175 per entry \$175 each \$
(for entries sent between Nov. 5, 2010 and Nov. 12, 2010)
Total \$

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- Check (payable to Access Intelligence/CableFAX) Money Order
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The awards are presented by the most trusted information source in cable: CableFAX Daily and sister brand CableFAX: The Magazine.

Questions? Contact Awards Coordinator Mary Lou French at 301-354-1610; mfrench@accessintel.com.
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and programmers face their own challenges with the economy and public perceptions, **New Orleans Saints** owner/evp *Rita Benson LeBlanc* told **CTAM** Summit attendees that adversity builds character. “I hope the spirit of New Orleans penetrates your meetings,” she said, noting the city’s resilience in the face of Katrina and more recently the **BP** oil spill stemmed from its refusal to believe those who wrote the city off. In fact, she said local resolve “changed the conversation on New Orleans” from perceptions that the city was dying to one of renewal and revitalized entrepreneurial spirit. “If we can do it, anyone can have faith in their own personal prosperity,” she said. In many ways, fan devotion to the Saints buoyed the city’s spirits, she said (Of the Saints’ Super Bowl win, LeBlanc flashed her ring and said she wears it “to realize it really did happen. It wasn’t just a dream”). She also thanked **ESPN** specifically for how it handled the Sept ’06 Monday Night Football game welcoming the return of the post-Katrina Saints and “making that programming a homecoming for the nation and for the world.” At the time, that game was the highest rated MNF in history. At the conclusion of LeBlanc’s talk, **ESPN/Disney** evp *Sean Bratches* pledged \$20K toward the New Orleans Relief Fund. -- Congrats to CTAM’s Mark Award winners. **Showtime** received the most awards, with a total of 33. **HBO** followed with 31. Meanwhile, **Nat Geo** won the most awards for a single, basic cable network with 17—besting their own record of 16 set in 2009. **Cox** won the most Mark Awards among cable ops with 15, followed by **Comcast** with 7.

Technology: **Showtime** has launched an app for non-subs to sample its programming and instantly upgrade to the premium net with the click of the remote. The preview app is available nationwide to **FiOS** subs. -- **CableLabs** will release specs for DOCSIS Provisioning of EPON for Business Services, giving cable ops a common method of using DOCSIS back office specifications and service concepts to provision and operate Ethernet Passive Optical Network products when delivering IP and Ethernet services.

5 Qs with ESPN evp, sales and marketing Sean Bratches: What’s the upside and appeal of ESPN Goal Line and ESPN Buzzer Beater, the new services that Time Warner Cable, Bright House and FiOS TV have agreed to carry? Speaking as an avid college football fan with 4 sons, I don’t think it gets much better than Goal Line. It’s the best of college football (and soon, college basketball with ESPN Buzzer Beater), all in one place. The decision to launch these channels grew from conversations with our affiliates, who often list growing sports tiers among their priorities. **What did you learn from ESPN XP’s World Cup research that most informs on a current sports media consumption pattern/trend?** There were several trends that support what we have said all along: multiplatform content does not cannibalize TV ratings. This is an important point for both us and for our affiliates to keep in mind as new screens continue to proliferate the viewing landscape. On the advertising side, it was overwhelmingly apparent that a coordinated multiplatform campaign produces better results across the board. Recall, brand attitude, purchase intent and brand affinity were all elevated in a multiplatform scenario. In fact, advertisers who put together the most cohesive story saw the greatest impact. **Consumers are arguably more resistant to 3DTV than initially expected. What do you think the next 5 years hold for ESPN 3D?** We think consumers have been trending about where we thought they would when we announced the launch of this network last Jan. HD adoption also started with a slow, steady pace and we are seeing that 3D is about the same if not slightly faster than that. The benefit to us is that fans have seen 3D in the movie theaters so they know what 3D looks like, as opposed to seven years ago when fans weren’t sure what high definition even meant... Our affiliates have approached us about doing more content in 3D; specifically going 24/7. **Through plays such as local Websites, ESPNu and now espnW, ESPN has been at the forefront of market segmentation. How important is that focus to future growth?** For affiliates, more opportunities to create value locally is critical. And for advertisers, more market segmentation means that we have the opportunity to provide an attractive audience to a local advertiser who may not need a national presence. We are many things to many audiences in many places, but as we embark on each of these products, we have to be resonant, authentic and relevant—whether we’re in New York, Chicago, London, Rio or Bangalore. The same goes for products like espnW that serve distinctly female demographic. **Save for costs, what are the greatest concerns you hear from ops and advertisers about cable programming?** There is no such thing as a cookie-cutter solution. Our industry has changed dramatically in the last 20 years, and the landscape is more complex and competitive than ever. Operators and advertisers are looking for unique opportunities that support their brands and give them a competitive edge in the marketplace. We do our absolute best to deliver for our clients, and I think our most recent deal with Time Warner Cable is a great example of an expansive cross-media agreement that takes advantage of technology to introduce new products and services and helps both sides serve our fans better than ever before.

Marketing: **Nat Geo** is kicking off its most extensive multiplatform campaign ever for 7-part, HD event “Great Migrations” (Nov 7). In addition to TV, radio, digital media, in-store and other outreach, the campaign includes an education initiative with affiliates providing students with the opportunity to interact in a virtual live assembly held at Sea World Orlando. Other components include NGC supporting the launch of UPS’s new ad campaign “We Love Logistics,” by developing 30-sec

BUSINESS & FINANCE

vignettes that compare the animal logistics featured in Great Migrations with the logistics UPS handles daily. -- To promote the debut of "The Walking Dead" on **AMC** Oct 31, nearly 700 Hot Topic retail outlets are featuring Walking Dead merchandise (key chains, shirts, etc) and a chance to win a Mac Book Pro. -- **Sportsman Channel** said it has launched a "multimillion dollar" marketing and ad campaign for 4Q focused on its HD programming airing during new primetime themed programming blocks. The largest campaign ever for Sportsman, it's running across sister company **InterMedia's** 17 websites, 15 print magazines, regional radio shows, email marketing, social media initiatives, and at events.

Public Affairs: **GMC** produced a 30-sec "Exercise Your Right to Vote" PSA and has sent it to 20 other nets to possibly run and brand with their own ID.

Obit: **EchoStar** pres **Dean Olmstead** passed away after a battle with cancer. Olmstead joined EchoStar shortly after its spin-off from **DISH** in '08. Before that, he was an adviser and board member of **Loral**. The family has requested that donations for scholarships in remembrance of Olmstead be sent to the **Arthur C. Clarke Foundation** or the **Society of Satellite Professionals International**. A family service will be held in WA and a date will soon be announced for a memorial service in DC.

CableFAX Daily Stockwatch

Company	10/18 Close	1-Day Ch	Company	10/18 Close	1-Day Ch
BROADCASTERS/DBS/MMDS			ARRIS GROUP:9.89.....0.03		
DIRECTV:.....	42.54	(0.11)	AVID TECH:.....	13.96	0.01
DISH:.....	19.08	(0.17)	BIGBAND:.....	2.94	(0.02)
DISNEY:.....	34.75	(0.13)	BLNDER TONGUE:.....	2.34	(0.06)
GE:.....	16.25	(0.05)	BROADCOM:.....	37.42	(0.31)
NEWS CORP:.....	15.82	(0.2)	CISCO:.....	23.30	(0.07)
MSOS			CLEARWIRE:.....	6.94	0.01
CABLEVISION:.....	26.67	0.01	COMMSCOPE:.....	22.69	0.23
CHARTER:.....	32.90	(0.39)	CONCURRENT:.....	6.69	0.04
COMCAST:.....	19.01	0.07	CONVERGYS:.....	11.54	0.16
COMCAST SPCL:.....	17.91	0.04	CSG SYSTEMS:.....	19.32	0.18
GCI:.....	10.28	0.07	ECHOSTAR:.....	19.11	(0.15)
KNOLOGY:.....	14.89	0.34	GOOGLE:.....	617.71	16.26
LIBERTY CAPITAL:.....	56.94	(0.22)	HARMONIC:.....	6.97	UNCH
LIBERTY GLOBAL:.....	33.33	(0.15)	INTEL:.....	19.19	(0.13)
LIBERTY INT:.....	14.21	(0.29)	JDSU:.....	12.13	(0.12)
MEDIACOM:.....	7.16	(0.07)	LEVEL 3:.....	0.87	(0.01)
SHAW COMM:.....	22.72	0.40	MICROSOFT:.....	25.82	0.28
TIME WARNER CABLE:.....	57.59	0.99	MOTOROLA:.....	7.88	(0.07)
VIRGIN MEDIA:.....	23.94	(0.29)	RENTRAK:.....	27.30	(0.17)
WASH POST:.....	382.57	0.85	SEACHANGE:.....	7.73	0.10
PROGRAMMING			SONY:.....	32.95	0.82
CBS:.....	17.49	(0.05)	SPRINT NEXTEL:.....	4.57	(0.02)
CROWN:.....	3.50	0.18	THOMAS & BETTS:.....	44.14	(0.16)
DISCOVERY:.....	43.28	0.09	TIVO:.....	10.09	(0.02)
GRUPO TELEVISA:.....	22.31	0.33	TOLLGRADE:.....	7.65	UNCH
HSN:.....	31.68	(0.1)	UNIVERSAL ELEC:.....	21.54	0.33
INTERACTIVE CORP:.....	25.41	0.12	VONAGE:.....	2.79	0.14
LIBERTY:.....	39.83	0.17	YAHOO:.....	15.93	(0.33)
LIBERTY STARZ:.....	66.95	0.35	TELCOS		
LIONSGATE:.....	7.55	(0.1)	AT&T:.....	28.62	0.29
LODGENET:.....	2.83	0.05	QWEST:.....	6.35	0.01
NEW FRONTIER:.....	1.72	(0.08)	VERIZON:.....	32.59	0.16
OUTDOOR:.....	5.92	0.04	MARKET INDICES		
PLAYBOY:.....	5.26	(0.08)	DOW:.....	11143.69	11143.69
SCRIPPS INT:.....	48.35	0.10	NASDAQ:.....	2480.66	11.89
TIME WARNER:.....	31.73	(0.06)	S&P 500:.....	1184.71	8.52
VALUEVISION:.....	2.56	0.16			
VIACOM:.....	41.49	(0.17)			
WWE:.....	14.01	0.09			
TECHNOLOGY					
ADC:.....	12.65	(0.04)			
ADDVANTAGE:.....	3.13	(0.04)			
ALCATEL LUCENT:.....	3.69	0.02			
AMDOCS:.....	30.02	0.10			
AMPHENOL:.....	49.89	(0.26)			
AOL:.....	25.96	0.52			
APPLE:.....	318.00	3.26			

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I've always thought of New Orleans as a place that stirs the imagination.

From the vibrancy of Jackson Square to the mosaic of neighborhoods to the might of the Mississippi itself, there's power and excitement that make every corner a gateway to something new and different and makes every visit to the city a feast for the senses.

What a perfect location—and metaphor—for SCTE Cable-Tec Expo 2010! Over the next few days, we'll be bringing the energy of New Orleans to the cable engineering community. We'll have speakers that inspire, products and solutions that can improve the way we do business today, and visions of where the industry is headed and how we can get there.

And just like you would with the Big Easy, we're hoping that you will embrace everything we have to offer. That you drink in the wisdom of the thought leaders in our sessions, that you wander the nooks and crannies of the show floor, and that you make the most of the opportunity to network and share experiences with engineers from across the country, and around the globe.

At the same time, though, I'm going to ask you to use your imagination. As the cable industry is being changed by new technologies and approaches, Cable-Tec Expo similarly is undergoing a transformation. At every turn—from panels to partners to product demos—you'll see new ways to help the industry attract and retain subscribers and generate revenue.

What we'd like to know is the vision that you—the vendors, the attendees and the speakers who bring life to our event—have for Cable-Tec Expo. As we



Mark Dzuban

continue to adapt the industry's premier technology conference to a new era, what is it that we can do to ensure that it meets your needs?

For the present, we're pleased at what we have to offer: A who's who of cable technologists—including Time Warner Cable EVP Mike Hayashi, Comcast SVP Steve Reynolds, and thought leaders from such companies as Cisco, Motorola, NDS and Accenture—in the opening sessions. Frank discussions on where the industry is headed and how IP technologies and advanced home networking solutions can help us meet the needs of the digital consumer. Workshops featuring some of the brightest minds addressing such topics as Content Delivery Networks, DOCSIS 3.0, 3D

Video and Energy Management. Not to mention a smorgasbord of technology exhibits that includes our "Green" and Networked Home Pavilions, scores of innovative companies and the fruits of our cooperative venture with CableLabs.

We think the program committee, under the chairmanship of Cox's Jay Rolls, has done a wonderful job in putting together a show to remember, but in the end what we think isn't important. What's really going to help us to drive new success for Cable-Tec Expo is the feedback that we get from you.

So as you're listing to workshops, walking the floors or simply talking with other engineering professionals, try to view Expo not just as it is, but as it could be in the future. Keep those thoughts in mind when you receive our Cable-Tec Expo survey next week. Let us know what we need to do to make every aspect of Expo—from the programs to the exhibits to the social events—not just meet your expectations, but reach the farthest limits of your imagination.

(Mark Dzuban is CEO of SCTE).

CableFAX_{THE MAGAZINE} 2010 Most Powerful Women in Cable

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Special Section: Women in Cable Technology

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Advertising Contacts:

Debbie Vodenos | Publisher | dvodenos@accessintel.com | 301.354.1695
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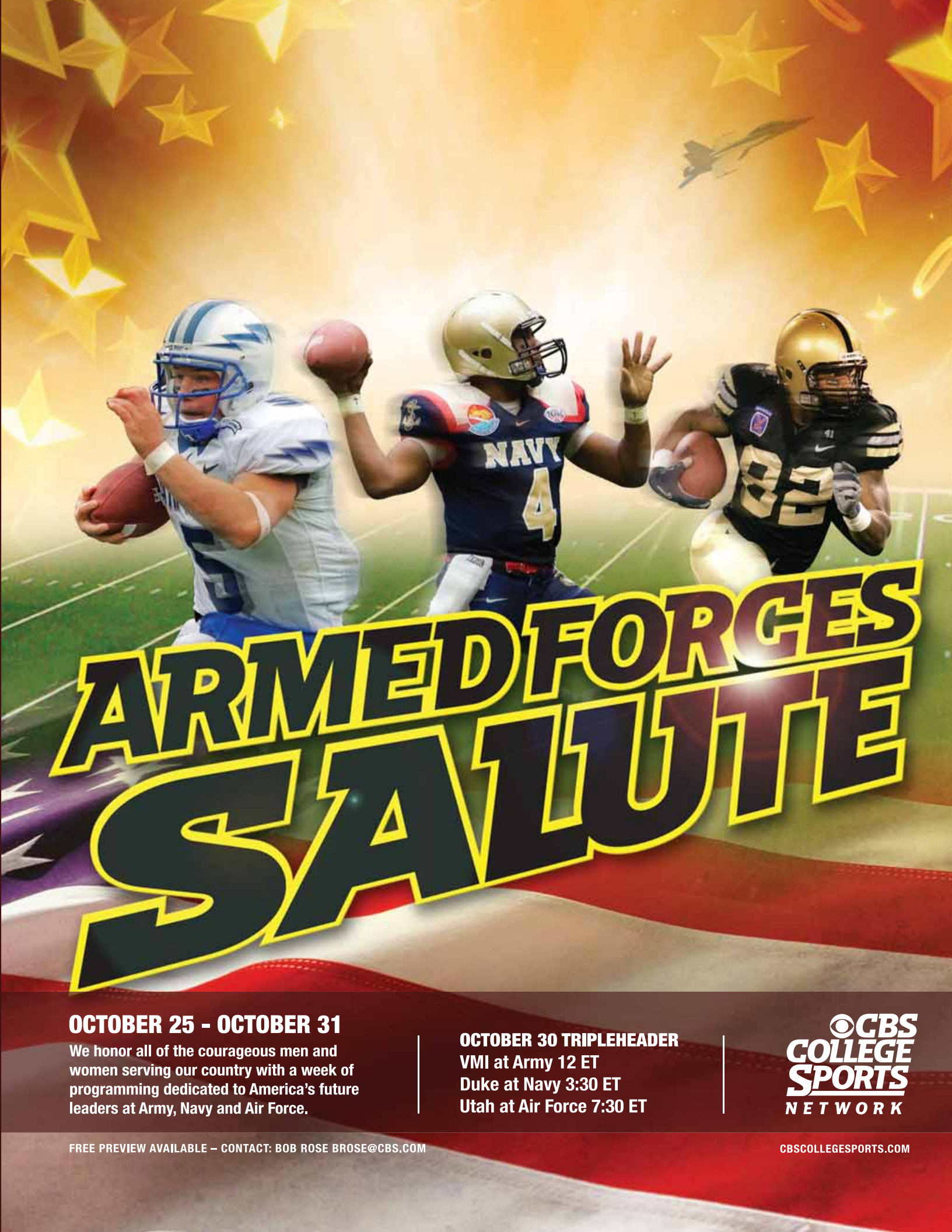
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