

CableFAX Daily™

Tuesday — October 20, 2009

What the Industry Reads First

Volume 20 / No. 201

Nielsen Everywhere: How Fast Integrated Measurement Comes Still Undetermined

As promised, **Nielsen** met with dozens of senior clients Fri to talk about integrating TV and Internet measurement in homes—something increasingly important with the rollout of the TV Everywhere model. Not surprisingly, everyone's pretty supportive of the idea of wrapping the 2 together. But there was "no unanimity on how fast we should do this," a Nielsen spokesman said. "Some want us to do it extremely fast." The next step will be canvassing clients for one-on-one discussions, he said. Later this year, Nielsen plans to disclose a plan for rolling out the Internet meters. "There was broad agreement on putting Internet meters in the TV sample, so we could have the ability to look at Internet viewing in the same homes we are measuring TV from," *Sara Erichson*, pres, media client services at Nielsen told *MediaDailyNews* in an interview. Internet meters are slated to be rolled out to its entire TV measurement panel in '10, with integrated measurement from the TV and online expected in '11. Last month, media companies including **Time Warner**, **Discovery Comm** and **ESPN** announced the **Coalition for Innovative Media Measurement**, which aims to foster innovation and collaboration in order to address the issue of TV and online integration. A few companies are already providing some integrated measurement. This summer, **TiVo** and **Quantcast** rolled out a cross-platform analysis solution for evaluating the correlation between TV viewership and online activity. The first data is expected to be available at the end of this month or early next month.

Competition: **Verizon** announced new pricing for quad-play bundles available in the Northeast and Mid-Atlantic regions, with customers who sign up by Jan 16 to receive a \$150 Visa prepaid card. Examples include a wireless calling plan (450min) with Freedom Essentials voice, **FiOS TV** and **FiOS Internet** for \$135/month, or the wireless and voice portions along with HSI and **DirecTV Plus DVR** for \$125/month. Certain contract commitments apply. -- **DirecTV** agreed to carry within its basic package **Network**, **Resort** and **Residence TV**, a channel focused on travel and real estate offers that counts 15 distinct series.

Dishing on DISH: **Sanford Bernstein** raised its price target on **DISH** to \$17, but disagreed with what it called the sudden consensus view that the DBS op has "turned the corner." Keeping its "market-perform" status on the stock,

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KEYNOTE FROM THE SOCIAL MEDIA MOUNTAINTOP



KEYNOTE SPEAKER

CHRIS HUGHES

Co-Founder, Facebook
Founder, My.BarackObama.com

Presented by **We** TV
Simply Fascinating



You could say he “wrote the book” on social media. Only the **23rd Annual NAMIC Conference** will feature Chris Hughes, the co-founder of Facebook and the mastermind behind My.BarackObama.com, two of the most successful start-ups in modern history.

At 25 years old, Hughes forever influenced the direction of technology and new media, which has created a paradigm shift within the communications industry. Hughes has helped hatch Facebook from his dorm room at Harvard, created the campaign apparatus that helped elect President Obama, and revolutionized the Web as a political tool.

What's next for new media and communications? Be there as Hughes delivers insights and applicable recommendations on technology and its power to transform customer service, communications, media and politics. Diversity rules and knowledge is king at the **23rd Annual NAMIC Conference**. Given the current business landscape, expert information is the key to strategically and intelligently planning for future opportunities. The unsurpassed speakers and sessions at this year's NAMIC Conference make it the choice for getting more intelligence for your investment.

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Sanford Bernstein said the question for investors is whether or not DISH can achieve growth without sacrificing ARPU and SAC. The uptick in target price reflects roll-forward estimates and application of a higher target multiple in line with broader market appreciation, but it remains below the current trading range, the firm told clients. Something else to keep a watch for is DISH's ongoing legal battle with **TiVo**. Oral arguments are scheduled for Nov 2 in DISH's appeal.

Inside the Beltway: The list of net neutrality supporters and opponents continues to grow, with several media giants expressing their happiness that the **FCC** is set to begin the process to adopt network neutrality rules. "We believe a process that results in common sense baseline rules is critical to ensuring that the Internet remains a key engine of economic growth, innovation, and global competitiveness," said a letter signed by 24 execs from companies such as **Amazon**, **eBay**, **Twitter** and **IAC**. Cable execs may be torn Thurs over whether to watch the FCC's open meeting on proposed net neutrality rules or a **House Commerce Communications subcmte** hearing on video competition that will feature **Cablevision's Tom Rutledge** and **Disney's Ben Pyne**. Both start at 10am.

Carriage: **Hallmark Movie Channel** said it's now distributed in the top 30 TV markets while counting overall distribution of 25mln homes. -- **Comcast** moved **Outdoor Channel** to a more broadly distributed tier (Digital Preferred) in UT. -- **ShopNBC** has completed carriage negotiations with a group of cable and satellite providers covering approx 65% of its 73mln-home footprint.

Advertising: **ZenithOptimedia** downgraded to -9.5% from -8.5% its '09 TV ad market forecast, but did upwardly revise '10 estimates to +0.5% from -1.6%. The firm also said Internet ad spending will grow 19% this year, including 45% growth in social media and 69% in mobile.

Technology: **Episodic** announced the general availability of its video publishing suite that manages and monetizes both live and on demand video streaming to any Internet-enabled device from a single app. **Showtime Nets** currently uses Episodic tech. -- **Cedar Point Comm** intro'd a solution allowing residential and commercial service providers to more cost effectively deploy PacketCable 2.0/IP Multimedia Subsystem services.

Programming: **Hallmark Channel** bowed "Movie Night with hoops&yoyo," an on-air programming and marketing initiative launched with **Hallmark Cards**. Animated characters hoops&yoyo, in their 1st TV appearance, will host Fri night programming (Nov 27-Dec 25) as part of the net's "Countdown to Christmas" initiative. **Hallmark Movie Channel**, meanwhile, plans to begin premiering original movies in 2Q. -- **Nickelodeon** premieres Nov 6 CG animated comedy "Fanboy and Chum Chum," a spin-off from **Nicktoons**, and is offering an advanced screening at **Nick.com** and through **Nick On Demand**. -- **IFC** picked up the 3-season library of "Arrested Development" from **20th TV**, and will launch the show Sun. -- **Disney Channel** greenlit a 3rd season of "The Suite Life On Deck" -- **Starz** inked a 10-yr output deal with action sports film producer **Warren Miller Ent** that includes 4 untitled projects to air across the net's platforms starting in '10.

People: **SAG** has named **David White** national exec dir and chief negotiator. White had been serving as interim exec dir since Jan. -- Former **FCC** chair **Reed Hundt** is joining **Skadden, Arps, Slate, Meagher & Flom** law firm, according to reports. -- **Arris** tapped **Sandra Howe** of **Cisco** as svp, strategic market development.

On the Circuit: Tix for "Positively Cable: A Night of Musical Memories," **Cable Positive** Denver's benefit, are free to those who register for **Cable Connection Fall** events and RSVP during the initial conference sign up. This year's performance

CableFAX: The Magazine presents The Programming Issue: Best & Next

Inside the Pages, we honor the Best Cable Shows, plus Fall Program originals

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Discovery Communications	Planet Green
Fox Cable Networks	TLC
HDNet	Veria

Coming in November 2009

The Most Powerful Women in Cable issue
Space Close: October 27
Artwork: October 29



To read the digital version of the magazine go to:
<http://www.cablefaxmag-digital.com/cablefaxmag/cablefax200909/>
Print copies available Cable Connection-Fall

BUSINESS & FINANCE

may be the end of the musical revue's 15-year run. -- **Quiznos** chief marketing officer *Trey Hall* and **Univision Interactive Media** pres *Kevin Conroy* will share the stage at **CTAM Summit's** general session, "Sea Change in the Consumer Landscape," Mon, 9am. -- Co-sponsored by **SCTE**, the **Cable-Labs 3DTV Pavilion** will feature at next week's SCTE Cable-Tec Expo in Denver the 1st-ever demo of transmissions of synchronized, full color, HD stereoscopic 3D video signals over a single cable channel on a real cable system. Included will be home theaters from **Sony** and **Panasonic** and consumer 3D TVs from **Hyundai**, **LG** and **Sony**.

Business/Finance: Sprint will pay a total of \$831mln for affil **iPCS** (including the assumption of \$405mln in debt), and importantly will join iPCS in seeking an immediate stay of all pending litigation between the pair—including an iPCS claim that the Sprint/**Clearwire**/cable mobile broadband JV would produce unfair competition in its service territory that includes parts of IL, MI and IA. **Clear** is preparing to launch 4G wireless broadband services in Chicago over the coming months. **S&P** maintained its 'buy' opinion on Sprint shares. -- **RBC Capital Markets** upped **Viacom** to 'outperform' from 'sector perform.' -- **Liberty Media's** planning to issue a prospectus for a new **Starz** tracking stock that would have \$800mln cash on hand and no debt.

CableFAX Daily Stockwatch

Company	10/19 Close	1-Day Ch	Company	10/19 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	37.56	0.54	AMPHENOL:	41.37	0.56
DIRECTV:	27.34	0.48	APPLE:	189.86	1.81
DISH:	19.10	0.62	ARRIS GROUP:	11.78	0.22
DISNEY:	29.87	0.47	AVID TECH:	15.08	0.18
GE:	15.84	(0.24)	BIGBAND:	4.26	0.00
NEWS CORP:	14.94	0.40	BLNDER TONGUE:	1.19	0.00
MSOS					
CABLEVISION:	23.55	0.05	BROADCOM:	30.37	0.39
COMCAST:	15.44	0.18	CISCO:	24.25	0.23
COMCAST SPCL:	14.77	0.16	CLEARWIRE:	7.75	(0.46)
GCI:	6.46	0.14	COMMSCOPE:	30.77	0.55
KNOLLOGY:	10.71	0.27	CONCURRENT:	4.48	0.08
LIBERTY CAPITAL:	22.53	0.12	CONVERGYS:	11.00	0.09
LIBERTY ENT:	31.76	0.56	CSG SYSTEMS:	16.02	0.02
LIBERTY GLOBAL:	22.94	0.25	ECHOSTAR:	20.94	0.58
LIBERTY INT:	12.00	0.14	GOOGLE:	552.09	2.24
MEDIACOM:	5.25	0.10	HARMONIC:	6.70	0.05
RCN:	9.52	0.06	INTEL:	20.41	0.23
SHAW COMM:	19.16	0.00	JDSU:	6.79	(0.08)
TIME WARNER CABLE:	41.80	1.22	LEVEL 3:	1.35	(0.01)
VIRGIN MEDIA:	14.40	0.29	MICROSOFT:	26.36	(0.14)
WASH POST:	483.10	8.29	MOTOROLA:	8.47	0.62
PROGRAMMING					
CBS:	13.71	0.62	OPENTV:	1.55	0.00
CROWN:	1.84	0.03	PHILIPS:	27.15	(0.18)
DISCOVERY:	30.87	0.76	RENTRAK:	17.82	0.14
EW SCRIPPS:	8.43	0.65	SEACHANGE:	7.65	(0.12)
GRUPO TELEVISA:	19.70	0.53	SONY:	29.51	0.63
HSN:	17.38	0.32	SPRINT NEXTEL:	3.44	(0.03)
INTERACTIVE CORP:	19.18	0.16	THOMAS & BETTS:	32.06	1.01
LIBERTY:	36.25	0.36	TIVO:	11.30	0.75
LODGENET:	7.19	(0.04)	TOLLGRADE:	5.68	(0.03)
NEW FRONTIER:	1.92	(0.06)	UNIVERSAL ELEC:	21.74	0.32
OUTDOOR:	6.67	0.12	VONAGE:	1.61	0.04
PLAYBOY:	3.65	0.05	YAHOO:	17.22	0.41
RHI:	2.99	0.01	TELCOS		
SCRIPPS INT:	40.00	0.35	AT&T:	26.00	0.30
TIME WARNER:	31.44	1.03	QWEST:	3.66	0.01
VALUEVISION:	3.82	0.14	VERIZON:	28.96	0.06
VIACOM:	30.38	0.37	MARKET INDICES		
WWE:	14.14	0.37	DOW:	10092.19	96.28
TECHNOLOGY					
3COM:	5.81	0.19	NASDAQ:	2176.32	19.52
ADC:	7.41	0.01			
ADVANTAGE:	2.28	0.02			
ALCATEL LUCENT:	4.74	0.07			
AMDOCS:	25.99	(0.9)			

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October 27, 2009 | Denver, Colo.

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EYE ON ADVERTISING

Beyond the Logo

Available in 39mIn homes, **Logo** has come along way since it debuted 4 years ago. At launch, it had 3 charter advertisers. Today, Logo counts more than 200 advertisers and marketing partners for everything from packaged good to movies to cars. **CableFAX** editor *Amy Maclean* chatted with Logo marketing vp *Amy Wigler* about the ad climate and brands' efforts to reach a GLBT audience.

The ad market has obviously been impacted deeply by the economy. How are things looking these days?

I feel people are beginning to exhale. I feel that the tide is shifting, and I feel that we're seeing more optimism in the marketplace.

Is that evident with scatter?

We have such a unique, targeted audience. The gay market is somewhat recession-proof in that they're such a fiercely loyal, trend-setting consumer group. They tend to not have children, so they tend to have more disposable income. We're definitely seeing scatter...But a lot of it is just in the sense you have in talking with people. I'm not feeling the same doom and gloom I did 6 months ago.

What are you doing differently in this climate to attract advertisers?

We wanted to be one-stop shopping for the gay market. I think in the past few months we've really had to cement that strategy. We've been working with our clients across all platforms to really leverage their messaging. Right now, an advertiser cannot get lost with spots and dots. Their voice needs to be heard loud and clear in a contextualized environment.

What are you doing in terms of integrated campaigns?

We've got such cool alignments with movie studios,

and we've been able to do some really interesting, custom programming with some of the studios. We're working on something now for "The Lovely Bones." We're working with on another program with **Levis**. We did a program with them last year around their "Unbuttoned" campaign. Car companies—we just launched a very cool promotion with **Subaru**. **Southwest Airlines**, we just did a 360 program that included online, on-the-ground and linear opportunities. Lately, we've been working with clients to take what they've done in the past and make it bigger and across platforms.

Do brands create different messaging targeted to a gay audience?

"I don't have gay creative," I often hear from my clients. Out of the 200 advertising and marketing partners, we have maybe 3 that have created custom, 30-sec spots distinctly for the gay market. Generally what we do is...work with them to create an interstitial that's attached to programming that feels more like true content on the site or on-air. For example, when I was working with **Absolut** last year...we built a really deep integration into one of our shows that centered on their messaging, which at the time was that their products were made with real fruit. The general market creative surrounded it within the show ["RuPaul's Drag Race"], but the context of the show made it gay.

Are you delving into interactive advertising?

We've done a lot of VOD where are clients are exclusive sponsors of VOD content. I think for us, we're beginning to work a lot more with mobile. For three-and-a-half years, no one wanted a mobile component attached to their plan. Now I'm seeing that all the time. They're also demanding more interactivity and connectivity on our online platforms. We're no longer doing just banner ads. People really want something custom on the site.



CableFAX
THE MAGAZINE

2009 Most Powerful Women in Cable
Salute Cable's Savviest and Most Innovative Women Leaders

FP and Spread Advertising Accepted

Publication Date: November 16

Space Deadline: October 27

Artwork Deadline: October 29

Distribution Bonus: WICT's Betsy Magness Leadership Institute Nov. 16-18

CableFAX 100 Luncheon, Dec. 10

CableFAX's Most Powerful Women in Cable Breakfast, Dec. 11

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Christians in Communications

Invites you to join us in Denver for two hearty breakfasts with inspirational messages during the CTAM Summit and SCTE Cable-Tec Expo.

CTAM SUMMIT

CIC Breakfast

Monday, October 26, 2009

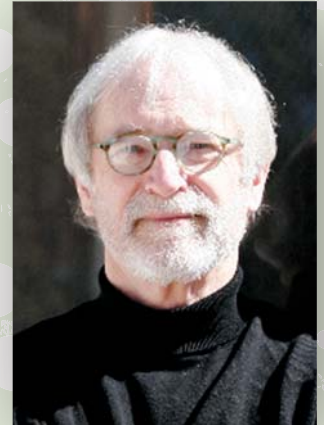
7:15 AM - 8:30 AM

Colorado Convention Center

Room 704

Dr. Bob Beltz

DR. BOB BELTZ will share a few lessons from "the back lot," which he learned while helping develop and produce the movie *Amazing Grace*, based on the William Wilberforce story. A former pastor at large churches in Denver and Santa Cruz, Bob is currently serving as special advisor to the Anschutz Corporation. In this role, Bob helps develop, produce, and market films for the Anschutz Film Group, parent company of Walden Media (*Because of Winn-Dixie*; *Around the World in 80 Days*; *The Lion, the Witch and the Wardrobe*). Bob is a graduate of Denver Seminary, where he earned both his Master of Arts and Doctor of Ministry degrees.



SCTE CABLE-TEC EXPO

CIC Breakfast

Wednesday, October 28, 2009

7:00 AM - 8:30 AM

Colorado Convention Center

Room 604

Senator Bill Armstrong

SENATOR BILL ARMSTRONG is currently President of Colorado Christian University. Bill owned and managed media companies before running for the Colorado state senate, where he served for 10 years. Believing in the importance of business people participating in government, he represented the state of Colorado in both the U.S. House of Representatives (1973-1978) and the U.S. Senate (1979-1991). During his final term in the U.S. Senate, he served as Chairman of the Senate Republican Policy Committee (1985-1991).



Breakfasts are sponsored by Front Porch, Buford Media Group, EWTN, TBN Networks, WHT, INSP, Parables and Olympusat.



Christians in Communications is an organization designed to provide Christians affiliated with the communications industry an opportunity for fellowship with other Christians.