

CableFAX Daily™

Friday — October 30, 2009

What the Industry Reads First

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That's a Wrap: Time to Diversify Cable Connection Fall Week?

Cable Connection Fall is almost over, with **SCTE's** Cable-Tec Expo closing Fri and completing the week of festivities in Denver. With the 1st fall week nearly behind us, it begs the question, will everyone participate in Cable Connection Fall in New Orleans next year? "At this time our plans aren't set yet for 2010," said spokesperson for **NAMIC**, which saw attendance for its annual conference usually held in NYC drop 53% to 400 registrants (that number doesn't include media, staff, volunteers). Other groups also said they were still in evaluating this week's events. There are rumblings that several people are pushing for fall events, at least the diversity events, to be moved to an East Coast city, but whether it's feasible remains to be seen. Next month, the committee that plans Connection will meet and hold a post-mortem that may provide more answers. **Kaitz's** Fundraising Dinner Wed night had more than 700 attendees and raised more than \$1mln for programs promoting diversity in cable. But that's down from 1300 guests and \$1.7mln raised in NYC last year. No word on final **ACC** numbers, but it was thought to be around 225 (down from 350 in DC last year). **CTAM** is pretty pleased with Summit's attendance number of 1990. That's well above the 1600 it forecast, but down some from last year's 2214 in Boston. Summit is set for Oct 17-19 in New Orleans next year. No attendance figures yet from **SCTE** Expo, but we've heard the floor seemed pretty busy Thurs. Meanwhile, **NCTA**, **CableLabs** and **SCTE** announced a new industry-wide technical summit that will merge annual events previously hosted individually by the organizations during **Cable Connection-Spring**. It features a combo of elements from NCTA's Technical Papers and SCTE's Conference on Emerging Technologies. The new tech conference, Cable Connection-Spring Technical Forum, will be fully integrated into next year's Cable Show (May 11-13, L.A.). "We predict the sum of one combined event, designed to meet the needs of the broadband industry's top innovators, will be greater than the separate parts," said SCTE pres/CEO *Mark Dzuban*. Cable Show registration will get you admission to the Spring Tech Forum, but separate enrollment is required.

Rate Hike: **Cablevision** announced Thurs that it would raise its avg cable TV price 3.7% in '10. That's up slightly from last year's avg 3.5% hike. For the 7th consecutive year, HSD and VoIP prices will not increase. New cable television prices will take effect over the next few months, depending on a customer's specific location and billing cycle. Earlier in the month, CVC rival **Verizon** increased its legacy **FIOS** TV Premier package (which is no longer offered) about 21% to \$57.99/month from \$47.99/mo. Premier subs could stay with that package or move to 2 new tiers with a \$47.99 or \$57.99 monthly price point.

Carriage: **Gospel Music Channel's** celebrating its 5th birthday Fri with distribution in 45mln homes, including through every major cable op plus **DirectTV** and **FIOS**.

In the States: **RCN's** offering a free preview of **Fox Sports en Espanol** through Wed. -- **Broadstripe** has more than

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doubled its Internet download speeds in MI to up to 15Mbps, at no additional charge to subs. -- **DirectTV** reseller **MDU Comm** said it acquired from **Delray Technologies** certain assets including 871 units and 472 subs to its Internet and DirecTV services in NJ and from **DirecPath** assets in FL including 1,839 units and 2,103 subs to its private cable, DirecTV and Internet services.

Earnings: Sprint deferred most of the **Clearwire**-based questions posed Thurs to that company, which reports 3Q earnings Nov 10, although CEO *Dan Hesse* did reiterate that Sprint "is able and supportive of funding our proportionate share of what it would take if the [Clearwire] decides to go internal to its investors to raise money...we are in a position to do that because it is very important to our future that this 4G network get built out." As Sprint's 3G network is currently twice the size of **AT&T's** and 14 times the size of **T-Mobile's**, said Hesse, the company has launched 17 4G mobile broadband markets to date and plans to cover 30mln people by year-end and nearly 120mln by Dec '10. "As we expand the device line up in 4G—dual-mode 4G/3G—it will really put us in a good position, going forward," he said. **S&P** maintained its 'buy' rating on Sprint shares. -- **Motorola's** Home and Networks Mobility segment posted \$2bln in rev () and operating earnings of \$199mln (). The unit shipped 3.3mln digital ent devices in the Q, and shipped its 1 millionth **WiMAX** device. **S&P** raised its Moto price target by \$1, to \$12.

Dinner Party: A highlight at Wed's **Kaitz** dinner was hearing first-hand testimonials from some people who were benefited by the groups the fundraising dinner supports—**Emma Bowen**, **NAMIC** and **WICT**. We hear it also was pretty entertaining to listen to the entire crowd of 700 cable execs sing "Happy Birthday" to the girlfriend of **CNN** anchor *T.J. Holmes*, who hosted the dinner. Here's hoping their stop in Denver en route to the Caribbean helps with Holmes' contract negotiations. **AETN's** *Abbe Raven* and **Cablevision's** *Tom Rutledge* co-chaired the dinner, which honored **Comcast** and **Turner** for diversity efforts. "While the weather outside was frosty, the dinner was a warm gathering that celebrated the industry's strides for greater inclusion," Kaitz exec dir *David Porter* said in thanking attendees and sponsors. -- At **ACC's** Beacon gala Mon night, *George Bodenheimer* talked about the important role communications played in helping build demand for **ESPN** in the early years and how it continues today. "What all of you in this room do is more critical than ever to our companies' businesses and to the industry... You are the ones on the front lines presenting your company's position faster than ever," he said. Bodenheimer and **Cable One** pres *Tom Might* received the group's '09 President's Awards. Might was recognized for his leadership following Hurricane Katrina in '05. "One-third of Cable ONE's local workforce was homeless and one-third faced major reconstruction," Might recalled. Doesn't sound like the MF-dropping comedian *Doug Williams* went over that well as master of ceremonies at the event. ACC pres *Jim Maiella*—who quipped at the end of everything, "You know, Doug, *Carrot Top* passed on this,"—might have delivered the biggest laughs.

Research: 43% of HDTV viewers say they watch HD programming daily, according to **Knowledge Networks**, up from 26% in '07. While 68% (vs 61%) "always make an effort" to watch HD over simultaneous standard-def content, "how to" shows, with a 14-point jump, led dramas (+11), national evening news (+9) and sitcoms (+9) in 2-yr percentage-point gains in HD viewership. Sitcoms (47%) and dramas (43%) lead the group in HD viewing. Meanwhile, women are more likely to say that ads in HD programming are "relevant to needs and interests" (42% females, 31% males), and they are more inclined to purchase from brands or companies that advertise during HD programs (24%

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females, 15% males).

Technology: CableLabs issued a request for info to define elements for a common technical approach to give consumers secure online access to subscription video services from any provider. A goal is to use existing standards and specifications. The deadline for responses is Dec 11.

Ratings: Turner enjoyed Tues night its most-watched **NBA** double-header since '96 (3.7mln total viewers on **TNT**), which also ranks as Turner's most-watched opening night in its 26 years of airing NBA basketball.

Programming: Comedy Central greenlit a half-hour, weekly sketch series starring comedian Nick Swardson (debut in '10). -- **Fuse** Thurs added *Eminem* to the lineup of "Fuse Fest: Voodoo 2009" (Nov 6, 10pm ET). Other specials for Nov revealed at **CTAM** include: "Nirvana Live at Reading" (Nov, 11pm ET), "John Mayer: On The Record" (Nov 14, 9pm ET) and "Fuse Presents: John Mayer Live From The Beacon Theatre" (live in HD Nov 17, pm ET). The Mayer piece on Nov 14 is an interview with the artist discussing his album *Battle Studies* and his musical direction. -- On Sat at 7pm ET, actor *Edward Norton* tells **Planet Green's** "Focus Earth with Bob Woodruff" about his running Sunday's NY Marathon with members of the Mas-sai tribe to benefit a group working to protect E African grasslands.

CableFAX Daily Stockwatch

Company	10/29 Close	1-Day Ch	Company	10/29 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	35.74	1.05	AMPHENOL:	41.42	1.27
DIRECTV:	26.14	0.70	APPLE:	196.35	3.95
DISH:	17.73	0.45	ARRIS GROUP:	10.54	0.12
DISNEY:	28.14	0.90	AVID TECH:	13.21	0.25
GE:	14.87	0.45	BIGBAND:	4.00	0.15
NEWS CORP:	14.04	0.50	BLNDER TONGUE:	1.16	0.01
MSOS					
CABLEVISION:	23.46	1.12	BROADCOM:	26.89	0.24
COMCAST:	15.01	0.36	CISCO:	23.52	0.50
COMCAST SPCL:	14.52	0.41	CLEARWIRE:	6.60	0.28
GCI:	6.34	0.25	COMMSCOPE:	28.77	0.70
KNOWLOGY:	10.54	0.13	CONCURRENT:	3.91	0.00
LIBERTY CAPITAL:	20.95	0.35	CONVERGYS:	11.22	0.53
LIBERTY ENT:	30.79	0.86	CSG SYSTEMS:	16.49	(0.13)
LIBERTY GLOBAL:	21.34	0.60	ECHOSTAR:	18.19	0.11
LIBERTY INT:	11.46	0.29	GOOGLE:	551.05	10.75
MEDIACOM:	5.06	0.12	HARMONIC:	5.33	(0.61)
RCN:	8.58	0.24	INTEL:	19.22	0.19
SHAW COMM:	18.09	0.17	JDSU:	5.80	(0.01)
TIME WARNER CABLE:	40.89	2.02	LEVEL 3:	1.20	0.01
VIRGIN MEDIA:	14.68	0.99	MICROSOFT:	28.22	0.20
WASH POST:	452.03	15.03	MOTOROLA:	8.74	0.78
PROGRAMMING					
CBS:	12.60	0.86	OPENTV:	1.54	0.00
CROWN:	1.75	0.00	PHILIPS:	26.05	0.93
DISCOVERY:	28.71	0.73	RENTRAK:	15.74	0.09
EW SCRIPPS:	6.95	0.39	SEACHANGE:	6.97	0.19
GRUPO TELEVISA:	20.37	0.57	SONY:	30.54	1.91
HSN:	15.03	(0.24)	SPRINT NEXTEL:	3.09	(0.15)
INTERACTIVE CORP:	19.01	0.21	THOMAS & BETTS:	35.28	0.98
LIBERTY:	34.37	0.80	TIVO:	11.33	0.26
LODGENET:	5.14	0.38	TOLLGRADE:	6.00	0.08
NEW FRONTIER:	1.96	(0.02)	UNIVERSAL ELEC:	20.56	(0.19)
OUTDOOR:	6.91	0.17	VONAGE:	1.59	0.09
PLAYBOY:	3.23	0.49	YAHOO:	16.13	0.09
RHI:	2.80	(0.01)	TELCOS		
SCRIPPS INT:	38.06	(0.35)	AT&T:	26.23	0.15
TIME WARNER:	30.67	1.09	QWEST:	3.64	0.10
VALUEVISION:	3.37	0.17	VERIZON:	30.04	0.09
VIACOM:	29.88	0.97	MARKET INDICES		
WWE:	13.71	0.08	DOW:	9962.58	199.89
TECHNOLOGY					
3COM:	5.44	0.14	NASDAQ:	2097.55	37.94
ADC:	6.71	0.13			
ADVANTAGE:	2.28	0.00			
ALCATEL LUCENT:	4.17	0.18			
AMDOCS:	25.59	0.73			

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PROGRAMMER'S PAGE with Chad Heiges and Seth Arenstein

Screen Shopping

Kellogg cited shoppers' loyalty to its cereal brands as a key driver of 3Q profit growth, and at **CTAM** this week **TAXI** chmn *Paul Lavoie (Cfax, 10/27)* espoused the power of effective branding in any industry. Indeed, spotlighting established cable brands such as **Nat Geo** and **HBO** to expand brand recognition and loyalty has become perhaps even more important to programmers over the last year. Yet amid a turbulent cable era marked by critical initiatives such as advanced advertising and multi-platform marketing, best practices in these areas remain a work-in-progress. As Nat Geo evp, gm and CTAM co-chair *Steve Schiffman* told **CFAX** earlier this month, "there are more changes in 1 quarter in this industry than there have been in 5 years in packaged goods." Formerly of the latter industry, Schiffman says viewers find the current media landscape is "very parallel to walking into a supermarket aisle now and just being bombarded with choices." As a result, "it has never ever been more important to differentiate a brand so it can really stand out—even above and beyond distribution issues and awareness issues—by using clever marketing techniques." So, as with end caps in supermarkets, cable marketers must view the landscape as a sampling opportunity. "In the cable space, if you get on the VOD barker box of **Comcast**, for example, one of the ways to break through the clutter is to work with your distribution partners to leverage some of their tools and talk to their consumers." Continued Schiffman: "off-channel media is a very powerful way to build awareness, [be it] advertising on other channels or movie screens or billboards in NYC where consumers run into you." Of course, once new viewers arrive, delivery of expectations becomes paramount—or even the most intuitive plans may go snap, crackle, pop. *CH*

Highlights: "Poliwood," Mon, 7:30pm, **Showtime**, "By The People: The Election of Barack Obama," Tues, 9pm, **HBO**. It's early Nov and premium nets are running political docs. Watch them in order, viewing *Barry Levinson's* disjointed but useful "Poliwood" first. Levinson's beef: TV has changed politics irreparably, the depth is gone. Candidates are salespeople/actors who must be 'good TV' to win. TV news is no better. [**PBS's**] *Jim Lehrer* provides a public service, but "everyone else" in TV news is ratings driven, **MSNBC's** *Lawrence O'Donnell* admits. **HBO's** film is a well-told and intimate portrait of *Obama's* campaign, yet its near-total avoidance of policy issues speaks to Levinson's thesis. -- "Without Bias," Tues, 8pm, **ESPN**. That this fine doc is slow to deal with Len Bias's legacy beyond sports is a minor quibble. *SA*

Worth a Look: "Breaking the Surface," Sat, 9:30pm ET, **Sportsman Channel**. We don't often tout fishing shows, but watching champs *Diana Rudolph* and *Kim Bain-Moore* gracefully casting for carp in Montana is wonderfully relaxing. *SA*

Notable: "Sex Rehab with Dr Drew," series premiere, Sun, 10pm, **VH1**. Drew's shows are perfect background noise while on a treadmill. Claiming he's slept with 3K women, rock drummer *Phil Varone* should present *Drew* with a challenge. *SA*

Basic Cable Rankings (10/19/09-10/25/09) Mon-Sun Prime			
1	ESPN	2.6	2571
2	USA	2.5	2503
3	TBSC	2.1	2080
4	DSNY	1.9	1910
5	FOXN	1.7	1684
6	NAN	1.4	1346
7	TNT	1.2	1212
7	A&E	1.2	1146
9	TOON	1.1	1079
10	HGTV	1	1008
10	SYFY	1	1005
10	FX	1	961
13	FAM	0.9	901
13	FOOD	0.9	898
13	CMDY	0.9	879
13	DISC	0.9	874
17	TLC	0.8	814
17	HIST	0.8	799
17	TRU	0.8	782
17	SPK	0.8	780
17	LIFE	0.8	777
17	HALL	0.8	744
17	BRAV	0.8	714
17	NKJR	0.8	566
25	AMC	0.7	636
26	MTV	0.6	634
26	BET	0.6	571
26	MSNB	0.6	553
26	ESP2	0.6	550
26	LMN	0.6	469
31	CNN	0.5	532
31	VH1	0.5	505
31	TVLD	0.5	477
31	HLN	0.5	459
31	APL	0.5	438
36	TRAV	0.4	382
36	EN	0.4	381
36	CMT	0.4	327
36	OXYG	0.4	325
36	SOAP	0.4	317
36	NGC	0.4	298
36	WGNA	0.4	296
36	GSN	0.4	283
44	WE	0.3	250
44	DHLT	0.3	222
44	DXD	0.3	216

*Nielsen data supplied by ABC/Disney



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