

CableFAX Daily™

Wednesday — November 16, 2011

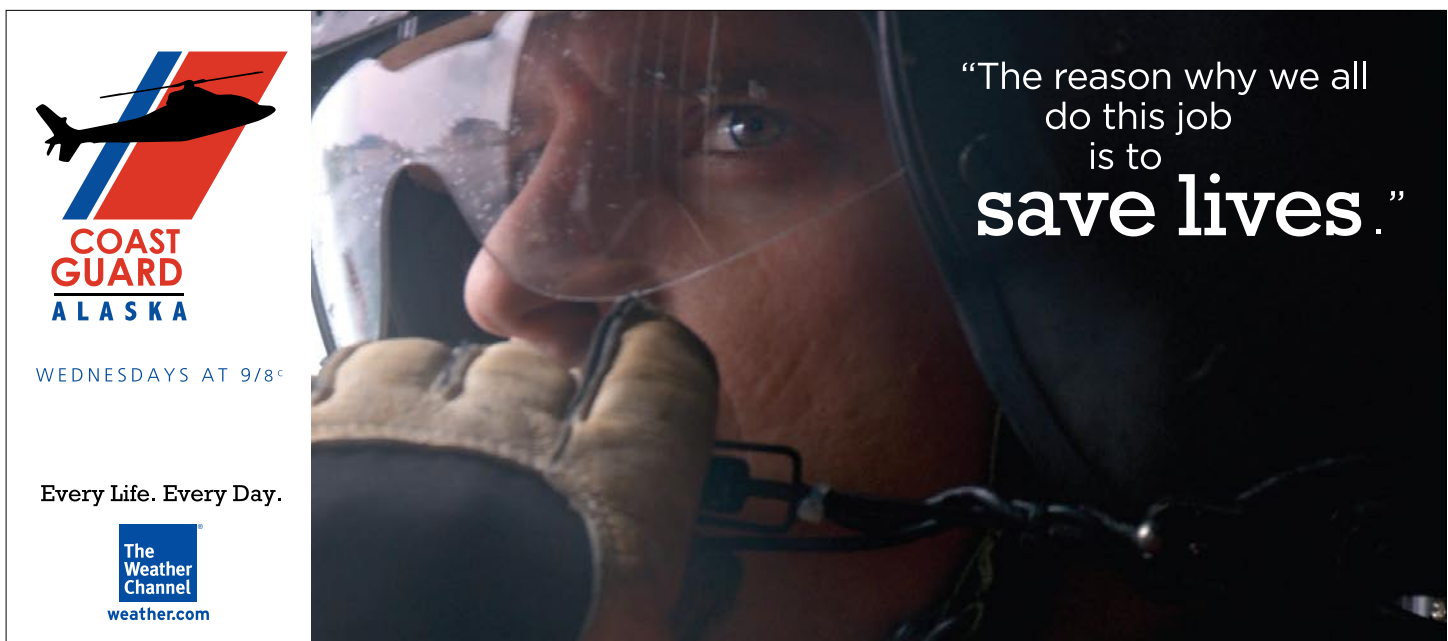
What the Industry Reads First

Volume 22 / No. 222

Understanding Broadband: NCTA's Powell Urges Simple Message

It's not yet clear if metered broadband is in cable's future, but if the industry goes that route it has to be careful with marketing or "we'll blow this... we've blown this before," NCTA chief *Michael Powell* said at a WICT VA breakfast Tues. His concern is that cable won't have the right conversation with customers. "Use more, pay more; use less; pay less" doesn't cut it, he said. "All consumers think they are heavy users," said Powell. "We'll talk right past consumers. To consumers, the Internet is time." That's why someone who spends 6 hours on **Facebook** every day thinks they're a heavy user despite consuming very little bandwidth. Calling himself a bit of a "frustrated marketer," Powell went on to add that "part of me wants to ban the conversation on speed." The computer industry got wise and no longer sells products on speed, he said during an interview on stage with **Cox VA** svp, gm *Gary McCollum*. "At some point, they're all fast enough," and consumers don't understand what those numbers mean. When it comes to marketing, he said cable could learn from its telco counterparts. "**Verizon** used the invention of a new technology [wireless] to rebrand," Powell said. "We should do that with broadband." Another worry for cable is shrinking discretionary income. "We're a disposable income business. It's a value, but it is not cheap," he said. Enter cable's recently announced \$10/month broadband program for low-income families. Powell pointed out that it's new money and also creates goodwill in Washington. There won't be any quid pro quo for cable because of its broadband adoption plan, but as Powell put it: we'll get a meeting, they'll hear our views and weigh them in a thoughtful manner. -- NCTA staffers: If you haven't read *Walter Isaacson's* biography on *Steve Jobs*, better get a copy soon. Powell said he was going to make his staff read it, describing it as being able to watch the birth of *Henry Ford* or *Thomas Edison* and watch their entire contribution and the impact in 1 lifetime. Meanwhile, we're hoping someone will fill us in on Powell's slides at NCTA's board meeting Wed. While talking about Jobs' ability to get employees to do what they didn't think was possible, he complained that his chief of staff told him Mon night that his 16:9 Powerpoint presentation would have to be 4:3. "Certainly we can find a TV at the **Time Warner** Center? I'll stop at my house and take my own," he quipped.

Bucking Bronco: Cable technologists at this year's **SCTE** Cable-Tec Expo—if not overwhelmed by the pace of change within cable—are certainly impressed by it. "You'd have to go back 20-30 years to see the kind of turmoil like



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we're seeing right now," said **Motorola Mobility** chmn/CEO *Sanjay Jha*, who called cable tech a "bucking bronco industry" because of the dramatic changes occurring every few months, whether from a technology or economic perspective. **Cox** pres *Pat Esser* cautioned the crowd to heed the most important message despite the noise. "There are people in this industry who think we [technologists] are leading this revolution. We're not leading," he said. "Our customers are leading, and we have to run as fast as we can to keep up with them." That race toward customer satisfaction includes the iPad, and Esser said Cox is set to intro in-home video streaming to the device sometime during the holidays—much sooner than he thought possible. Meanwhile, both Jha and Esser agreed that WiFi is a big opportunity for cable to capitalize on its home-based relationships. "Today, nobody really owns the home network. No one has unified how consumers interact with the network," said Jha. "I don't think there's any other industry positioned to replace that broadband connection." Jha also noted how cable's broadband tech still owns key advantages over the burgeoning wireless market. "It costs 30-100 times more to deliver data via wireless than through a broadband pipe," he said. "This notion that you can deliver all your broadband needs through 4G is not physically or economically possible." Still, the continued emergence of smartphones shouldn't be overlooked, a point backed by Cox through its launch of mobile services. "In 2013, we think there will be 1bln smart phones and nearly all will be video enabled," said Jha, adding that 5 times more people view content on smartphones now than they did in '10.

On the Hill: House Comm subcmte chmn *Greg Walden* (R-OR) scheduling a Thurs briefing with the **FCC** and **FEMA** to review the results of last week's National Emergency Alert test (**Cfax**, 11/10) and discuss improvement measures. "In my home state of Oregon, most—if not all—stations didn't even receive the signal," said Walden.

In the States: Including **Hearst**, **E.W. Scripps** and **Belo**, 10 broadcast groups that collectively cover 76mln homes inked a commercial partnership with **ConnectTV**, a real-time social network allowing TV viewers to interact with other fans watching the same program while providing related content and promo opportunities. All the partners will integrate and synchronize their programming within ConnectTV beginning early next year and also have locals ads appear. -- **AT&T's** set to launch 4G LTE service in 5 additional US markets Sun, including Charlotte, Las Vegas and Oklahoma City.

VCTA Notebook: Nice to see regional shows thriving. The **VA Cable Telecom Assn's** annual conference kicked off Mon with a healthy number of operator and programmer attendees. A topic du jour was, of course, TV Everywhere. At this point, it's not a matter of "running to catch up, but awareness," said **Cox VA** vp, marketing *Jonathan Freeland*. Consumers are already watching the video online, but the challenge is to get them to do it through Cox, he said. Awareness is in the low 40 percent range, with only about 15% using Cox's TVE service. In June, **Comcast** saw about 400mln online downloads of its Xfinity TV app. "But there are still a lot of customers not using it, so there's an education piece," which includes TV spots, said *Frank Purcell*, sr dir, product marketing for Comcast Beltway. -- **NCTA** chief *Michael Powell* addressed the group Mon night, calling again for the industry to innovate at a faster pace. Pointing to Scripture's "a little child should lead them," he worried about the kids today who will be the future customers of tomorrow. When it comes to this rapid-fire technology, "we're frauds. We're just adapting [to it]," he said. Younger people, on the other hand, are all about personalization and making technology their own experience and interactive. Also worth noting... cyber-security. Powell has mentioned it a couple of different times



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recently and Mon night said “we’re fighting to be a part of those conversations,” saying that cable is often seen as a retain offering vs a critical network. -- Interesting to hear what does and doesn’t work for advanced advertising. It would seem a for-profit college would be a great candidate for Request for Information (RFI) ads, but when *Kevin Meek*, **Comcast Spotlight** gen sales manager, interconnects, told 1 such VA college it would have to wait a day to get the leads, it was turned off. It prefers the instant communications it gets through it’s 1-800 number and Website. More successful was an RFI for a free milkshake at **McDonalds**. It was slated to run for 30 days, but all coupons were gone in 15. And Meek cited difficulty getting follow-up on how many of those coupons were redeemed. One of the things that most excites *Sam Divine*, dir, biz dev for **Cox Media**, about RFI is how much better brand recognition is for those spots, whether or not a person clicks for more info.

VOD: Protext Mobility launched an extensive TV ad and distribution campaign supporting **AmberWatch TV**, a VOD and interactive channel dedicated to child safety and that’s expected to be available across **Cablevision’s** footprint by the end of the month.

Tech: Rovi inked a licensing deal with **Blue Ridge Comm** for deployment of its TotalGuide xD that allows subs to remotely connect with their DVR and channel tune, plus search for authenticated TV and movies before watching them on multiple mobile screens. **Buckeye CableSystem** also agreed to launch xD along with Rovi’s TotalGuide solution covering already-deployed set-tops. -- **Midcontinent** selected **Infinera’s** DTN platform for its latest backbone network expansion in MN connecting newly acquired territories. -- Among several new offerings intro’d by **Motorola Mobility**: a hosted client TV app that streamlines set-up costs and time-to-market in order to help small to mid-size ops quickly and efficiently deliver live video to tablets; a MOTr modular Hub providing ops with a singular flexible hub that can eliminate the need for the bricks-and-mortar variety; and a high-density Universal Edge QAM to satisfy the growing demand for VOD content. -- **Arris** completed trialing of its open-architecture approach to enabling dynamic ad insertion into live and VOD content delivered to portable devices and set-tops through use of its AdManager platform. Separately, the company expanded its broadband portfolio of advanced test equipment to include **Spirent’s** Tech-X Flex home analyzer, a hand-held MoCA-certified tester for cable ops deploying whole home solutions. -- **Cheetah Technologies** is demoing a network performance monitoring device allowing for system analysis of analog video, DOCSIS data and QAM digital video channels in an HFC network. -- **Verivue** is adding its content delivery product to the integrated solution from **itaas**, **RGB Networks** and **Verimatrix**. The joint effort allows ops to deploy multiscreen TV Everywhere services.

Digital: GSN.com and **Jewelry TV** partnered for the site’s Diamond Week, which through Sun allows players to enter daily sweepstakes and auctions and compete in a week-long Bejeweled 2 tourney for a chance to win prizes from JTV such necklaces and bracelets. Also, JTV.com will provide discounts to GSN customers. – While iPads dominated the tablet market in 3Q in terms of videos viewed, according to **Ooyala**, viewership across connected TV devices and game consoles exploded. **[For more info see CableFaxDaily.com]**.

Ratings: There are 2 ways to assess the performance of **Fuel TV’s** programming that surrounded **Fox’s** Sat feature of the UFC heavyweight title fight. The net garnered just 83K and 37K P2+ for its pre- (2 hours) and post-fight (1 hour) coverage, respectively—starkly below the fight’s 5.7mln viewers—but the totals both compared favorably to the net’s avg prime viewership last week of 18K.

Programming: E! renewed “Chelsea Lately” through ‘14 as part of larger producing deal with creator *Chelsea Handler*. -- **MSG Varsity** inked a multi-yr agreement with the NYC Dept of Education to become the official sports net of the Public Schools Athletic League and receive the right to showcase any of the league’s regular season



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and playoff games. -- As **Nat Geo's** top series, "Alaska State Troopers" returns Dec 4. -- **Showtime** ordered a 13-ep 8th season of "Weeds." Prod begins next year. -- Olympic speed skating champion *Apolo Ohno* and *Danica McKellar* will star in **Syfy's** original move "Tasmanian Devil," set to begin prod this month. -- **BBC America** greenlit 5 more specials of "The Nerdiest," based on *Chris Hardwick's* podcast of the same name. They'll air throughout the year. The 1st—a year-end review of things nerds love—debuts Dec 24 at 9pm.

Honors: **SCTE** honored **Charter** vp, field ops *Tom Gorman* with its Member of the Year Award for being the driving force behind the recent changes in the structure and purpose of the org's board. The retired *Harold Null Sr* and **Suddenlink** CTO *Terry Cordova* were inducted into the SCTE Hall of Fame, and *Cordova* was also bestowed with the SCTE Chairman's Award for his exemplary efforts as program cmte chmn for this year's Expo.

On the Circuit: **Time Warner Cable** evp, network national ops *Jim Ludington* will serve as the program cmte chair for SCTE Cable-Tec Expo '12. -- **Turner Broadcasting** chmn/CEO *Phil Kent* will deliver the opening keynote speech as **NATPE** (Jan 23-25 in Miami).

People: *Chelsye Burrows* joined **GMC** as vp, public relations.

CableFAX Daily Stockwatch

Company	11/15 Close	1-Day Ch	Company	11/15 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BROADCOM:	35.95	1.43	BROADCOM:	35.95	1.43
DIRECTV:	47.08	1.45	CISCO:	19.12	0.18
DISH:	24.19	0.63	CLEARWIRE:	1.80	(0.04)
DISNEY:	36.45	0.33	CONCURRENT:	3.94	0.04
GE:	16.20	0.10	CONVERGYS:	12.38	0.23
NEWS CORP:	17.71	0.31	CSG SYSTEMS:	15.20	0.31
MSOS					
CABLEVISION:	15.25	0.14	ECHOSTAR:	23.74	0.20
CHARTER:	53.18	0.73	GOOGLE:	616.56	3.56
COMCAST:	22.30	0.09	HARMONIC:	5.64	UNCH
COMCAST SPCL:	22.15	0.18	INTEL:	25.34	0.71
GCI:	9.51	0.12	JDSU:	11.96	0.12
KNOWLOGY:	14.22	0.28	LEVEL 3:	20.56	(0.51)
LIBERTY CAPITAL:	79.32	(0.16)	MICROSOFT:	26.74	0.18
LIBERTY GLOBAL:	42.15	0.71	MOTOROLA MOBILITY:	38.90	(0.11)
LIBERTY INT:	15.93	0.09	RENTRAK:	13.08	0.12
SHAW COMM:	20.81	0.17	SEACHANGE:	8.82	0.27
TIME WARNER CABLE:	61.58	0.96	SONY:	17.42	(0.09)
VIRGIN MEDIA:	24.37	0.17	SPRINT NEXTEL:	2.92	0.06
WASH POST:	345.41	4.74	THOMAS & BETTS:	52.24	0.49
PROGRAMMING					
AMC NETWORKS:	36.97	0.62	TIVO:	10.60	0.16
CBS:	25.48	(0.6)	UNIVERSAL ELEC:	16.74	0.45
CROWN:	1.61	0.05	VONAGE:	2.78	0.06
DISCOVERY:	42.01	(0.88)	YAHOO:	15.93	(0.07)
GRUPO TELEVISIA:	21.11	0.06	TELCOS		
HSN:	36.69	0.01	AT&T:	29.25	0.06
INTERACTIVE CORP:	41.90	0.64	VERIZON:	37.24	0.24
LIBERTY STARZ:	68.40	0.12	MARKET INDICES		
LIONSGATE:	8.54	0.03	DOW:	12096.16	17.18
LODGENET:	2.20	0.04	NASDAQ:	2686.20	28.98
NEW FRONTIER:	1.13	0.05	S&P 500:	1251.78	UNCH
OUTDOOR:	7.23	0.16	TECHNOLOGY		
SCRIPPS INT:	40.36	0.07	ADVANTAGE:	2.04	(0.03)
TIME WARNER:	34.76	0.14	ALCATEL LUCENT:	1.95	(0.02)
VALUEVISION:	1.75	(0.21)	AMDOCS:	29.55	(0.02)
VIACOM:	53.70	0.18	AMPHENOL:	47.42	0.79
WWE:	9.99	UNCH	AOL:	15.02	0.01
TECHNOLOGY					
ADDVANTAGE:	2.04	(0.03)	APPLE:	388.83	9.57
ALCATEL LUCENT:	1.95	(0.02)	ARRIS GROUP:	11.06	0.17
AMDOCS:	29.55	(0.02)	AVID TECH:	7.24	0.28
AMPHENOL:	47.42	0.79	BIGBAND:	2.23	UNCH
AOL:	15.02	0.01			
APPLE:	388.83	9.57			
ARRIS GROUP:	11.06	0.17			
AVID TECH:	7.24	0.28			
BIGBAND:	2.23	UNCH			



Deadline: December 2, 2011 • Enter At: www.CableFAX.com/BOW11

CableFAX's Best of the Web Awards is the industry's top honor in the digital space, recognizing outstanding websites and digital initiatives among cable programmers, operators, vendors and associations.

The CableFAX Best of the Web Awards will also salute the cable executives behind the scenes who make these digital initiatives shine. The winners and honorable mentions will be saluted during at an awards event in Spring 2012 in New York City.

Deadline: December 2, 2011

Sponsorship Opportunities: Debbie Vodenos at 301-354-1695; dvodenos@accessintel.com
Entry Questions: Rachel Isaman at 301-354-1555; risaman@accessintel.com



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Deadline: December 2, 2011 • Enter Online: www.CableFAX.com/BOW11 • Event: Spring 2012

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

Campaign Categories:

- General and Campaign Categories
 Ad/Series of Ads
 App (for Smartphone)
 App (for Tablet)
 Authenticated Content Marketing Campaign
 Blog or Series of Blogs
 Community/Social Networking
 Contest/Online Games
 Corporate Social Responsibility/Education
 Digital Marketing Campaign
 Digital PR Campaign
 Editorial Excellence

- Email Marketing Campaign
 Online Newsroom
 Online Store/Merchandizing
 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/Moving Image
 Virtual Tradeshow or Online Event
 Web Site Design
 Web Site Redesign

People Awards

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

- Cable Operator
 Official Show Website
 Regional/Local Programmers
 Technology and other Vendors
 Web Show

TV Everywhere Awards

- Best Content Marketing/PR
 Best App
 Best Portal Site (Operator)
 Best Portal Site (Programmer)
 Best TV Everywhere Technology (Vendor)

Best Overall Websites

- Cable Network - Small and Mid-Size (Fewer than 50mln subs)
 Cable Network - Large (More than 50mln subs)

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/BOW11 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/BOW11 for additional category information and to enter online.

Mary Lou French
CableFAX's Best of the Web Awards
Access Intelligence
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Rockville, MD 20850

Deadline: December 2, 2011
Late Deadline: December 14, 2011
Event: Spring 2012

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. 11, 2011 and Nov. 18, 2011)
Total \$

The late entry fee must be applied to each individual entry postmarked after Nov. 11, 2011.
* Payment in full must accompany the entry.
** If entering more than one category, please submit separate entry forms.

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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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EYE ON ADVERTISING

Cable Strong

A lingering weaker than anticipated economy and uncertainty in international markets continue to give advertisers pause, a phenomenon now spilling into local markets. Yet where broadcast—which still bests cable 3 to 1 in overall share of the local pie—is sliding, according to local media consulting firm **BIA/Kelsey**, cable's local ad sales are holding strong. Mark Fratrick, VP/chief economist at BIA/Kelsey, tells Cathy Applefeld Olson why cable continues to trend upward and how operators can maximize their assets in the local market.

Cable remains steady, if not slightly up, in local ad sales despite a dip in the overall market.

MF: Advertisers have definitely been a little more hesitant over this year, plus we've had all the issues with the various foreign car companies getting enough cars as they've cut back. So there's been a little disruption overall in the local marketplace for most media. Cable hasn't changed very much from our original numbers. We expected to be around \$6.4 billion for this year, and that's a slight increase from last year. Cable has been making good strides over the last few years. Obviously as long as they cover a good portion of a local market, they do well in terms of selling advertising on all the cable networks.

Why is cable better able to hold its own?

MF: Cable has so much more original programming these days, and many networks are cross-scheduling so there is a lot more original programming in the spring and summer months—even during the regular season. There's also been consolidation on the local level among many MSOs, so there is more efficiency in the way they are selling, and they are paying more attention to local sales in general.

Why the increased focus on local ad sales now?

MF: It's an outcome of the MSOs growing, and getting consolidated on a local level. We're talking to a lot of MSOs who are getting very serious and making a more concerted effort about playing in the local advertising game. They want

to know everything they can about the local markets and spending across all advertising categories and media. They face a lot of competition in many areas of their business and are looking for ways to generate additional revenue streams with their existing group of customers. The interesting thing with cable advertising is that so much more of it goes to the bottom line. So if I increase cable advertising in a market by 20%, have I really increased any programming costs or any installation costs? No. So it can really lead to a substantial increase in profitability.



What's your best advice to keep expanding local ad sales?

MF: The biggest thing is that the competition faced by local cable systems is more than just with the local television station. And I believe they understand that. There's a plethora of different media that local businesses are looking at advertising with, and a lot of national media have differentiators now that have the ability to reach their local audiences. There's radio, out of home advertising, some areas of local and national magazines, directories. It's a long list.

But cable remains well positioned, overall?

MF: The other thing local cable systems provide is a regional demarcation, a way of splitting it off. If you just want one county, for example, you can't do that in over-the-air television but cable systems can do that for you. Especially the smaller advertisers are looking more to do that. If they can buy a regional ad, just where their business is based, that's big for them, and cable is very sophisticated in that sense.

How much of a game changer will true interactive advertising be when it gets here?

MF: It's definitely exciting and definitely something local cable systems can provide that local TV can't provide over the air. Cable's ability to deliver a different tailored message for certain people will add a little more competitive edge. But we're still in the very early stages.

CableJobs

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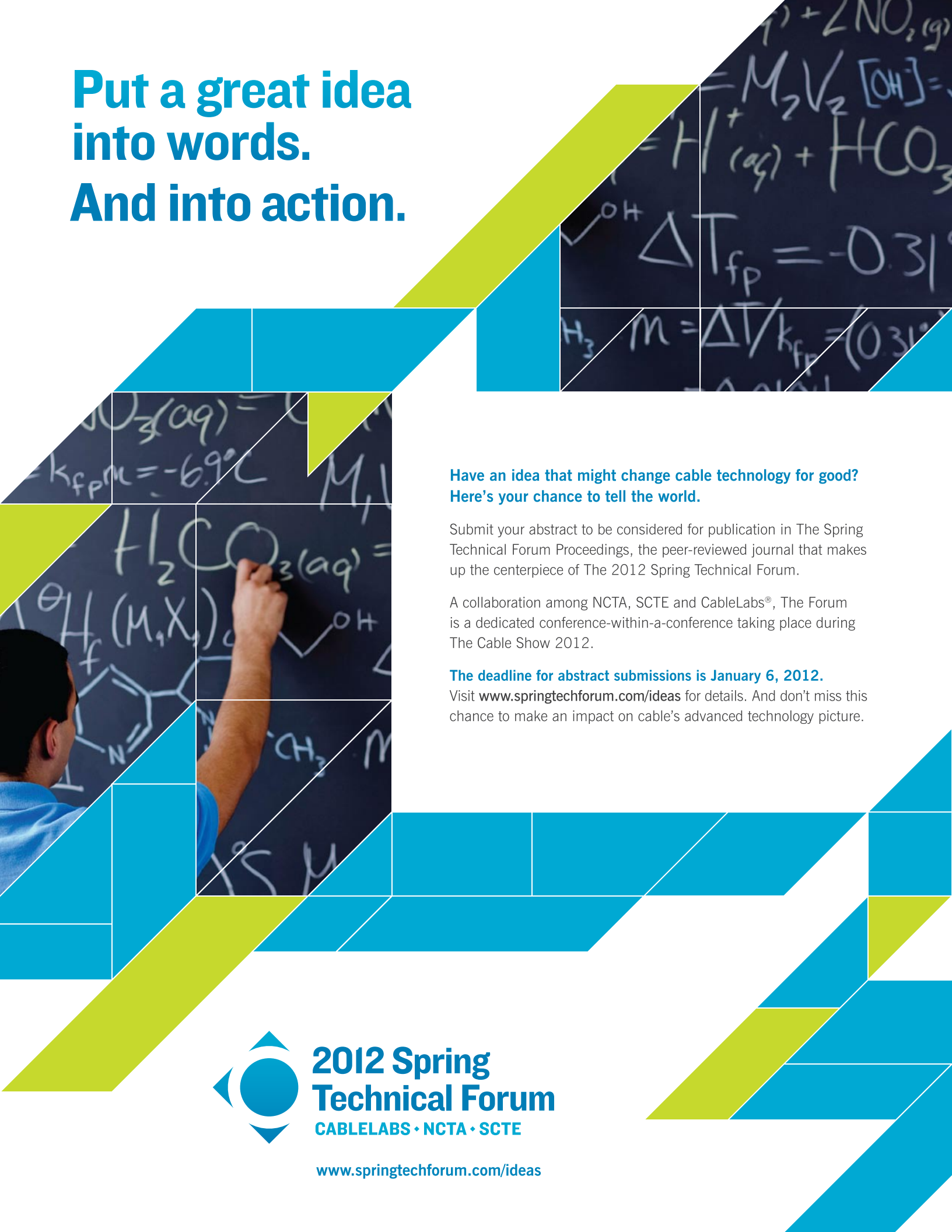
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Glenn Britt
Time Warner Cable

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The CT Platinum Awards Recognizes Broadband Technology for outstanding technology products & services, along with the most outstanding marketing campaigns. We applaud the 2011 System of the Year: Buckeye CableSystem and our inductees in our CT Hall of Fame.

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Most Powerful Women
in Cable

December 9, 2011
Breakfast
8:00 – 10:00 a.m.
Grand Hyatt, NYC

Join us for CableFAX’s Most Powerful Women in Cable Breakfast as we salute the women who have made their mark on the industry with leadership, innovation and community. Our distinguished guest speakers include:

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Executive VP & President
Time Warner Cable Media

Nomi Bergman
President
Bright House Networks

Italia Commisso Weinand
Senior Vice President,
Programming and
Human Resources
Mediacom Communications
Corporation

Carol Vernon
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