

TV Destinations and Events On-demand TV's Unintended Consequence

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Let's go out and have some fun! Have you ever been all dressed up with no place to go? Or had a destination but lacked any sense of urgency to head out — because you could go there anytime — like to the local war memorial, and so you seldom if ever bothered? Or discovered when you got to where you were going that there was really nothing very interesting to see or do? These are common enough frustrations in the real or material world where business, social and family destinations and events sometimes disappoint, as in a ski trip with poor snow conditions or a hot baseball game that turns into a blowout. What a bore, what a waste of time! Not so in the vicarious world of imagination, fantasy and illusion, in the old fashioned childlike world of make believe as in Hollywood and TV land — these folks were generally very good at creating an interest and drumming up some excitement. Except we have now heard a dark whisper suggesting that the 'time is elastic' capabilities of VOD, DVD and DVR may be stealing away some of that old magic — leaving

"The nonlinear on-demand TV space that is now emerging may impact TV in just the wrong way..."

fewer great destinations and a growing shortage of good events. Are we again to be all dressed up with no place to go?

Will the newly emerging PC and TV global broadband system provide the attractive fun destinations and appealing events needed to make us want to engage and stay tuned? Or, will what will be available lack sufficient interest and excitement and be more like choosing something to do by oneself when no one much cares? The nonlinear on-demand TV space that is now emerging may impact TV in just the wrong way to the dismay and surprise of the industry and a public

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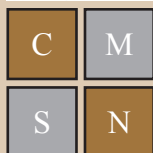
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"Validating the Middle Ground"



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that is anticipating a far better, more exciting future. After all, with old-fashioned scheduled TV (linear TV programming), put on by the likes of ABC, CBS and NBC, you knew your destination on Thursday night say, and family and friends would often join in. Will on-demand nonlinear TV turn out, in offending contrast, to be more akin to visiting the local library? Herein we take a gander at this disturbing possibility. Is it a tempest in a teapot or an imminent danger to the business — stay tuned?

The Unintended Consequence

Let's face it, an abundance of riches can at times take the appetite away, while a sense of urgency and scarcity can do much to create need and desire. Too much of a good thing may not be a good thing at all. Why bother to set off for the Greek Isles if you are able to go anytime, like in a month or two? That which is scarce, unavailable or unattainable holds much more mystery and stirs far greater passion and desire. As in a ticket to the Masters golf tournament, or to the Super Bowl, or an invitation to dinner at the White House or a date with the prettiest girl or handsomest guy in town. A youngster pulling out of the driveway for the first time in a shopworn convertible is surely far more excited than someone trading in a one fancy car for another, for practical reasons and not the thrill of it all. It's a shame most of us are that way, but we are. Nothing stirs the imagination or raises the desire for an ice cream cone with 'jimmies' on top as much as spotting such a treat in someone else's hand. Typically such a

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desire needs gratification right now—and not during a replay!

The same applies to many varieties of TV and PC entertainment, where abundance, constant availability and easy accessibility can paradoxically tend to spoil the party. If it is available anytime, any place and in any form, who wants it or needs it or gets excited about it. It is no longer an event, a happening or a win. If too much is revealed or too easily accessible, there is less drive to reach for it and little need to grasp it. It no longer has much cachet. In counterpoint a negligee can enthrall and excite far more than the nudity it withholds as it is an alternative

to that which offers too much too easily. It is the ritual dance of the Swans that holds the magic. Then how can on-demand nonlinear TV with its great abundance of content, available on-demand anytime, be such a good thing? It's a bit like

owning the Encyclopedia Britannica — you wanted it, it sounded like a good thing for the family so you bought it, but now you seldom sit down with a hot chocolate to peruse it and enjoy it, do you? The paradox of scarcity to abundance, followed by feelings of boredom and disenchantment, is replayed again — what a relativistic mystery is this thing called desire!

The pool table in the house, the espresso machine in the kitchen and the swimming pool in the backyard are very nice; but it is the date to go to the movie downtown or to the coffee shop or the community swimming hole to meet with friends that is a 'happening'

embodying urgency and excitement. If this is indeed the case then on-demand nonlinear TV may be based on a flawed economic model that could be driving the TV business toward a more uncertain future. With the caveat: 'too much abundance and availability may spoil the party' in mind, is on-demand TV and nonlinear TV a good thing or a bad thing? Herein we explore some of the ways to avoid these difficulties in order to ensure that on-demand nonlinear TV indeed emerges as a very good thing, and not a disturbing unintended consequence.

Places to Go, Things to Do and People to Meet

It has been said that in the real world what we actually spend that is most dear to us is our time. We do so by either taking an action or engaging in passive behavior such as daydreaming. Of course the action selected may itself lead to more passive behavior, but we first have to get there, say to the TV or movie theater, or to the park bench by the lake. Taking an action typically requires selecting among available choices, perhaps picking a destination and heading out, by car or via the TV Guide or Windows GUI. For a destination to be chosen requires an attraction a need or the presence of a driving force to engender urgency and anticipation and pull us in a particular direction. In order to participate one may have to go elsewhere, even if it is only to the next room, to the telephone, the PC or the entertainment unit. Looked at the other way around, unless you are able to get to the right destination you probably cannot partake of the chosen

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experience. All the while there are sure to be numerous competing choices that also vie for ones attention and time. Each has its own allure and fulfills a need yet may have a drawback or two, as in a wish to go to a Four Seasons Hotel restaurant for a great yet expensive meal.

As with eyesight, we are far more likely to notice and respond to a thing that is moving than to something standing still. That is the way of life; we are drawn to movement and change, while we quickly tire of that which is static or idle. Thus we tend to be attracted to events and happenings and to ignore that which is repetitiously, always there, or doing the same old thing. For these reasons, the grand opening of a movie or

a restaurant is a happening that may draw attention, while a list of the plays of Aristophanes — however meritorious his writings — is likely to be ignored nowadays as the author died over two thousand years ago. This human preference suggests that on-demand TV fare may not get the same degree of attention or cachet as scheduled event-like network TV programming. Although it has a greater convenience factor, its 'eye catching' draw is unlikely to match scheduled entertainment events that give the sense of urgency of an appealing 'to do' happening. This could spell money troubles for some on-demand services.

The Four Feathers

Out of this observation regarding our common nature we may spy some key aspects and attributes of on-demand

TV we can only ignore at our own peril. For example, for on-demand TV or PC based entertainment fare to succeed it must have a way to attract a sufficient audience to satisfy its revenue model and fund its operation; but if it based on such an on-demand always-there delivery model, how can it draw sufficient interest and attention to compete in the real world against the more compelling scheduled media events? Unless there is some strong attraction or need, such as a magnetic destination or exciting event, much on-demand TV content may lay fallow and fail to draw a sufficient audience.

In qualifying a 'buyer' for most anything — including on-demand content — we may want to recall that four primary qualifying conditions must generally be satisfied:

1. The prospective buyer must have a need for the product, service or activity.
2. The same party must have the ability to buy and the means to pay.
3. He or she must possess the right or authority to buy.
4. And have a **willingness to act soon, preferably now.**

Or else all of our efforts to seduce and draw the customer are likely to result in our disappointment and lead to failure.

These four conditions make up a practical test to determine whether or not a given on-demand nonlinear TV system is fully qualified and has a chance to succeed. In DEMAND, the

PPV TV content service that has now moved into the on-demand VOD space will have to satisfy this test or it may run into trouble. Some have resisted the so-called need to meet such a test by suggesting that content can also be free, or sponsored. As we noted above, that is hardly the point as the viewer is first and foremost spending his or her valuable time, and thus paying dearly for the privilege of watching. Thus, In DEMAND, MovieLink, Movie Beam and all other on-demand services will generally have to qualify their services by passing such a basic test of viability; and, as we may agree, it is condition four that is the real on-demand bugaboo: *the willingness to act soon, preferably NOW!*

It is therefore reasonable to suggest that in order to succeed, the service or application provider must first stimulate a need, make it affordable, address a suitable audience and motivate their participation, or they will not find or take the content off of the broadband. It sounds like a most formidable task when you put it like that, doesn't it? Consequently, the vast majority of new TV shows fail in the first year, with most of the remainder succumbing in the following year. For every *Friends* or *Frazier* there are loads of failures; and that is the likely outcome for the more appealing destination based, events styled TV model. Just imagine the difficulty of making always available, on-demand, fare an attraction. Of course such things as *Web MD* and *The Weather Channel dot com* are great successes, but

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more the exceptions that make the rule than an advertisement for on-demand content. Furthermore, they are destinations and they have achieved brand value. Not so for the plays of Aristophanes, which are marvelous but always there, as are the works of Shakespeare, Ibsen or Bruce Catton's *A Stillness at Appomattox* about the end of the US Civil War, all great content but who really cares or will pay sufficient attention to buy-in this very day?

Living the Life

Based on these perceptions one may suspect that the many on-demand TV 'pebbles on the beach' on the vast TV landscape each need to become an attraction in order to be picked up. Early to bed and early to rise and advertise should be their motto. Thus, as stated above, the very abundance we always desired from on-demand TV may yield the opposite of what we anticipated or desired. Like the Duke, John Wayne, sooner or later we must stop talking the on-demand talk and see about walking the walk if we are to prove out its revenue model; and that is what the cable MSOs are now in the process of testing out en masse with VOD and PVR.

Assembled on any on-demand services' hard drive we can expect to find a great collection of valuable content, like a Library of Congress collection of entertainment; but with so many on-demand choices we may find ourselves like the child in a room filled with toys, who concludes that there is really nothing worth playing with. Thus the

empowerment brought about by the remarkable TV, PC and broadband technologies may have over-sweetened the coffee, overfilled the plate with too many goodies and thereby inadvertently caused our clientele to lose their appetites. What a shame if this is so. Perhaps when it comes to on-demand we have misunderstood the viewing public's nature and its likely response to a world without enough destinations and events. If so, the on-demand revenue model is likely to require further adaptation, modification and enhancement.

While desire may be indeed be absolute in some sense, satisfaction is more often

a relative experience. For example, while the prettiest girl in town is indeed the beauty queen in her kingdom — and thus the object of much admiration and attention at home — when she ventures out to seek fame and fortune on Broadway she

is probably just another pretty face to be lost in the crowd. So too with the most popular programming available on Tuesday afternoon in the 4:00 p.m. timeslot. There an old episode of the Donna Reed Show may indeed be the big attraction but not so in the all-content-is-available on-demand broadband world — just another 'face' lost in the crowd. This point dramatizes the fact that when partitioned compartmentalized availability is replaced with universal accessibility, only the mightiest names, big brands, and great stars are likely to survive for very long.

Such are the reasons triple-A baseball

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has to a large degree succumbed to major league ball on television in its own markets, while local summer stock theater plays second fiddle to major touring Broadway shows and the like. It also explains why trade barriers between countries have existed for centuries to protect local products in local markets — herein read TV time slots; and why Marco Polo and Christopher Columbus explored for easier access to the rich spice trade of the East. When the restraints (of scheduled linear TV) are removed everyone wants to date the prettiest girl, go to the best show, eat at the finest restaurant and see Barry Bonds hit a home run in person at the seventh game of the World Series while seated right behind the batter's box. In that case, what is to become of the local product, local venue, local attraction or the best Chili in East Texas? Therein is embodied the hope and the challenge of on-demand nonlinear TV, can it be made to work to the satisfaction of producer and consumer alike? Is inadvertently concentrating the public's attention mainly on the top entertainment fare — much to the exclusion of most other content — a good thing for the media business or not? It is surely an unintended consequence of on-demand nonlinear TV.

It today's high tech world we have witnessed commercial power growing rapidly in the hands of a few organizations to the detriment of many other companies. In the computer software world it is all about Microsoft, in baseball the New York Yankees buy

up the best players at salaries no one else can hope to match and in the media biz it is Rupert Murdoch with hardly anyone else even close. In the process, AOL's careless expansiveness burned Ted Turner, Universal-Vivendi turned out to be a weak French trollop, Disney forgot to stay with Mickey Mouse and Donald Duck while NBC was repackaged inside mighty GE. Ever greater concentration may turn out to be another unintended consequence of on-demand nonlinear TV but it is too soon to tell. Yet those who sit astride vast libraries of content are indeed pretenders to the broadband entertainment throne and could win out by default. In counterpoint some would argue that the idea of the 'channel' — where skilled programmers aggregate and organize content for individual audience segments — remains compelling and viable. In the end, by living the life, it is the public as it walks the walk that will decide whether on-demand is truly compelling and can win out over the idea of the TV channel.

*“...it is the public as
it walks the walk
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On the Road to Timbuktu

All of this might make one a little weary of the on-demand roadmap that may lead a still unsuspecting media industry away from its traditional successful scheduled-programming-venues. Out where yet untested mortal concepts may reach unexpected dimensions in manifestly twisted shapes and where few sojourners have yet been heard from to tell a happy tale. On-demand could turn out to be a financially inhospitable barren wasteland, a media 'Timbuktu' far off

the beaten path on a 'time is elastic' nonlinear frontier where sustenance and survival may be harder to find or to sustain. Or it could turn out to be a great big success, no one knows for sure.

So how can the media companies, whether content owners or services providers, benefit from the new VOD, DVD and DVR technologies that enable the nonlinear on-demand TV experience and improve their revenue model? Is it possible, that in

addition to making the entertainment life of the TV viewer and PC user more convenient, that technology will also enable a better business situation for the many media companies? Or,

as some suspect, is the balance of power shifting back toward the consumer to the detriment of the provider? After all, in recent years media companies have benefited greatly from the technical enhancements that have emerged. At the studio level, at the cable head-end, out on the network and with client set-top boxes many innovations have triggered improvements in the ability of the content owners and service providers to offer a better product in a more reliable lower cost manner. While consumers have indeed also benefited, providers have been able to slowly encroach on their privacy and in some sense violate the sanctity of the home – as with popup and imbedded ads and many other so-called 'innovations'.

Is it possible that all those wise heads at the cable MSOs have somehow missed noticing the dangers that are inherent

in the on-demand TV experience? That seems a most doubtful conclusion, as they are just too smart for such an oversight. So why, after five or more years of wearily circling and sniffing the on-demand 'dog', are they now leaping in with such wild abandon and enthusiasm? What gives with Time-Warner Cable, Comcast and the rest embracing VOD and PVR and making nice with Motorola, Pace and Scientific-Atlanta — not to mention

the recent rapprochement with their old nemesis the CEA? Will they soon also be doing the foxtrot with the warriors of the MPAA — those brothers Karamazov supporters of MovieLink, Movie Beam and other not via

cable delivery models for movies?

The answer is simple; the cable MSOs are finally discarding the old catechism that declared that the satellite providers DirecTV and Echostar would top out at some 8 then 10 then 13 now 18 million subscribers. They are at long last facing the fact that self-serving declarations about their superiority in terms of such things as their two-way pipe and the like will not keep the Huns away from the Gates of Rome. In reality the competitive struggle against DBS is mostly about marketing and those satellite guys are tough marketeers. First it was only the wizard Charlie Ergen — a formidable enough fellow — but now the Houdini incarnate himself, Rupert Murdoch, is approaching the scene with soon-to-be-acquired DirecTV in hand ready to do battle. There is also all of that churn and its great cost to worry about. What

“So the answer for the cable MSOs seems to be an all-arms battle using HSD, VOD, DVR, ITV, VoIP...”

is one to do? So the answer for the cable MSOs seems to be an all-arms battle using HSD, VOD, DVR, ITV, VoIP and the rest in a last 'Stalingrad' attempt to sidetrack those clever DBS boys and prevent them from ruining the cable MSO's old oligopolistic endgame of merge and merge again. Good luck and churn on, for the times they are indeed still a-changing.

As some of the proponents of on-demand have proclaimed, the future is all about using vast databases and intelligent search engines to guide the masses to profitable 'cloisters'. In this scenario great quantities of entertainment and other content are stored together in repositories for consumers to discover on-demand via browsers and convenient GUIs that make it very easy to find what one desires. Much like shopping at a K-Mart or a Costco, you are strictly on your own far far away from Sachs Fifth Avenue style and old-fashioned service. Browse on search engines browse on.

Yet many of its proponents suggest that this is a far better way to inform and entertain the public in a commercially viable manner. No more tour buses and live tour guides, everyone is on his or her own with maps and e-guides to lead the way, as in an American tourist wandering through Florence with a renaissance art guide in one hand and a map of the city in the other. Surely, they say, this represents a much-improved modern brave-new-world of entertainment.

Many other equally degreed industry

experts remain somewhat doubtful. While few informed persons would deny the great efficacy and value the new technologies bring to the table, it may be a stretch to suggest that human behavior will too easily bend to the whims of these machines.

The on-demand challenge to destination based scheduled events appears clear, it is to somehow create the appearance of scarcity, notoriety, uniqueness and celebrity for that which is in fact constantly present parked on a hard drive or other media device.

Here then is a proper challenge for the creative forces of the multi-media advertising and promotion mega firms. Can it be done? Only time will tell, but it would go against modern commercial history to infer

that such a transformation is not possible and will not be achieved. If the recent past is any indication, new ways will soon be discovered to make on-demand nonlinear media vehicles highly attractive and profitable. At the same time, the traditional boutique TV and PC venue, as the equivalent of the high-class hotel, restaurant or shop, will also find new ways to survive. That is to say that HBO, Stars, In DEMAND, MovieLink and Showtime will find ways to sell their tour guide services to the many who do not want a browser life, or to wander through the streets of 'Venice' unaided, unattended and uncared for.

*"No more tour buses
and live tour guides,
everyone is on his or
her own with maps
and e-guides..."*

Dressed up for Success

The many methods of packaging, advertising, promoting and selling product by the media

companies and Madison Avenue will have to conjure up ways to rebundle on-demand entertainment fare in a manner that will indeed positively influence the public and thereby cause them to support the on-demand model. New ways that engender appeal, excitement and community that offer up new types of events and give the sense of going someplace new, to an exciting destination.

If our analysis is even partially correct, there are in our opinion powerful consequences that fall out of the on-demand revolution, including:

- Big-time big name branded entertainment such as *ER* and *Friends* will gain an even greater audience and enjoy a significant increase in long-term market value.

- The on-demand business is still at risk of failing to find a sufficient audience and thereby gain more than a marginal commercial success.

- Much of the more mediocre old content will soon disappear from the inventory as it is dated, unattractive and of little further value on an on-demand server, as few will watch it at any price.

- A great deal of the existing better grade entertainment content will need to be repackaged, rebundled and reconstituted to work in an on-demand environment.

- The TV advertising model will have to undergo some drastic change in order to survive at its current level of success, and it will.

- The vast investments being made in head-end VOD and ITV equipment will turn out to be a great success, but not for the original reasons.

- The current on-demand revenue models will have to be changed to match them much more closely to the actual buying behavior of the public; as in more choice, more types of choices, more promotions, specials, targeted events and the like. Also to reflect in the pricing the proper dating and aging of content as product.

- Competition among major broadcast networks for dominance of key primetime timeslots will diminish as linear-schedule viewing behavior gives way to various forms of on-demand nonlinear TV viewing by the public.

- The multi-purposing of content to make it available in various alternate forms for different media and different venues will greatly increase. So too the nature of TV production to accommodate this more flexible environment.

- The premium channels as super skilled bundlers of content will survive and prosper as they innovate new ways to make on-demand nonlinear viewing the method of choice for the consumer.

- If the revenue model is right the residual value of great past programming will continue to grow — read *Seinfeld*, *Northern Exposure*, and *The Honeymooners*.

■ Short content will become a major new source of revenue — as in short clips from the *Bob Hope Show* or *Dean Martin Show* packaged for a quick laugh or reminiscence.

(Leo Willner and Greg Kalsow contributed to this issue. In order to discuss any of these points with the

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—Georgia Pech, Editor]

KALSOW'S BACK-CHANNEL: “Validating the Middle Ground”

■ Many folks not directly associated with advertising in the cable business are befuddled by the apparent imbalance between cable and broadcasts upfronts and CPMs. All the while those laboring within cable TV advertising remain on a seemingly endless pilgrimage towards a level playing field. For an explanation we may have to look to the resistance to change of human nature. A predisposition that has apparently allowed some inertia and a frozen mindset to keep executives at the large advertising agencies focused on the national networks while resisting the benefits of advertising on the many local cable systems. All in all, an Alice in Wonderland where two plus two does not make four and the great advantages of local targeting are treated like SARS. Thankfully, wiser heads at the major advertising firms are beginning to awaken.

■ While the satellite service providers continue to roll out DVRs as a way to outwit cable, the cable MSOs are beginning to counter with new set top boxes from Motorola and Scientific-Atlanta that contain fully functional digital recording capabilities. At the same time the new features available in products from PVR firms such as TiVo, ReplayTV and Ucentric represent a wave of exciting new capabilities. Taken together, digital video recorder technology is a reality that is now reaching mass consciousness, and a way to watch TV that is here to stay. Consequently, the major advertising firms are fully aware of this trend and are by and large prepared to accept this evolution and to adapt their business models to this growing reality. Thus TV advertising will now survive as an elective impression creating activity, much like reading a magazine — instead of the old forced feed device. Surprise, surprise.

■ The warring factions among the cable MSOs and cable networks are now arraigned against each other for a great confrontation. Each is ready to accuse just about everyone else of some foul deed and everyone is

ready to target ESPN – or its parent Disney. In the background the regulatory agencies and congressional committees are making political hay out of the mess. In truth, free market gaming a la John Von Neumann dictate that three party games where the payee is the left out third party create a loss of rational controls and cause economic chaos; and that is the real crux of the problem. Think of the medical field where insurance companies and medical providers fight over what the paying public has little voice to control. Much the same here, where the sports industry and the players jostle over ever-rising contracts, while the public through its much maligned cable and satellite service providers is forced to accept and pay the bill. Do you get it? It's the three party economic game all over again that is the real problem! Think about it.

[Your mileage may vary. –RGK]

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Georgia Pech, Editor
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