

CableFAX Daily™

Friday — January 15, 2010

What the Industry Reads First

Volume 21 / No. 010

Growth Drivers: A Look at Top Distribution Gainers in '09

At the start of a new year, a lot of attention is made about ratings winners from the previous 12 months. But there's another marker worth noting—distribution gains. Based on Nielsen Universe estimates for Jan '09 and Dec '09, **NFL Net** saw the biggest percentage gain in subs among metered networks—30.6%, to nearly 55mln homes in Dec. That's not a surprise given its deal with **Comcast** that got it off of a sports tier. But there were other deals, including some renewals that had distributors taking the net's NFL package for the 1st time. One non-Comcast factor was the launch of **NFL RedZone**, which affiliates can only get if they take NFL Net. It helped bring new distributors on board, like **Massillon**. The net's hoping to entice a few more operators this year—including the notable holdouts. "This was a tremendous year—on a ratings basis, with all the success we've had with RedZone—there's a tremendous amount of excitement out in the field," said NFL Net vp, affil distribution *John Malkin*. "All of the operators I'm talking to are engaged, they want to talk more about RedZone, there all are very well aware of the successful season we've had...I expect a good year." **NBCU's mun2** was 2nd in distribution gains (25.8% to 33.3mln HHs), with *Jacqueline Hernández*, **Telemundo** COO, crediting some of its success to expanding the programming focus beyond music. "An example would be the Mexico-US soccer game last Aug. We reached our largest audience ever... We brought new people, new consumers and eyeballs," she said. It was so successful that mun2 has made sports a regular feature in '10, and is beefing up other areas, including movies. Deals with **Cablevision** and **Cox** helped **Fox Business** take the #3 spot (19.4% to 51.6mln). There also were deals with several independent ops, and the net was moved to Comcast's Digital Starter package in Boston and Chicago. What distributors are looking for during a recession is no different than what consumers want, said **Fox News** svp, affil relations *Tim Carry*. "If you buy something new, you're going to look for brand and you're going to look for value," he said. His wish list for 2010 includes deals with **Mediacom** and **Cable One**, as well as continued HD growth. Rounding out the top 5 were **Outdoor Channel** (15.3% to 34mln) and **Style** (10.9% to 65.6mln). Outdoor's 34mln homes is its highest universe estimate since it initiated Nielsen coverage in '02, and an especially proud moment for Outdoor svp, affil sales & marketing *Randy Brown*, considering he was brought on board in Sept '07 to get the net out of its distribution holding pattern.

The CableFAXIES awards

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The CableFaxies Awards salute the year's most outstanding communications initiatives and programs in the highly competitive and dynamic Cable arena. The coveted awards set the industry benchmark for excellence across all areas of PR and marketing.

The Winners of the CableFAXIES Awards are from networks, operators, PR firms, vendors, corporations, agencies and other entertainment companies who took chances, made tremendous strides and understand the power of PR and marketing in the cable industry. The winners and honorable mentions will be saluted during an awards event in April 2010 in New York City.

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“The surge really has its foundation in rebuilding the network around quality programming, improved scheduling and more contemporary branding,” he said. “I think we 1st had to restore affiliate confidence in the Outdoor Channel viewer experience.” Some of Outdoor’s gains came from getting off sports tiers, particularly with Comcast and **Time Warner Cable** (the net revised its rate card to offer incentives for the moves, which have included Detroit). Style’s big deal in ’09 was Cablevision, but it also picked up homes through some new launches with Cox and others. “One of the things that happened in ’09 is that we really did solidify our position as a network about transformation,” Style pres *Salaam Coleman Smith* said, adding that instead of serving as a general entertainment net for women, Style is focused on tips and stories for improving your life. “I think there was just this sense from 2008 and 2009 that Style had carved out a unique distinction.” Other nets in the top 10 for gains are **Lifetime Movie**—the only other net to post double-digit gains (10.2% to 74.6mln)—**History Intl** (7.7% to 55.8mln), **Reelzchannel** (7.3% to 46.9mln), **Biography** (7.1% to 56.6mln) and **Gospel Music Channel** (7% to 45.5mln).

Hubbub: **Discovery** announced that **The Hub** will be the name of its net stemming from its jv with **Hasbro** to replace **Discovery Kids**, with net pres/CEO *Margaret Loesch* telling critics at **TCA** that the channel will hit the 3-12 kids demo, emphasizing the 6-12 range, and “will be fun, playful, transformative” and “focus on clever stories and engaging characters.” Discovery also unveiled the logo and Web site www.hubworld.com. Still not a lot of specifics on programming (there are some things in development with the My Little Pony and Transformers brands), but Loesch told us that she has been “overwhelmed” by the creative community stepping up with so many ideas.

Fear and Scheduling: Former **Comcast** and **MTVN** exec *Diane Robina* was tapped by **TV Guide Net** to serve as evp, dev, acquisitions and programming strategy. Robina remains pres of **FEARnet**, a jv of Comcast, **Lionsgate** and **Sony**. TV Guide Net has markedly changed its content thrust since its purchase by Lionsgate early last year, and Robina is expected to continue the net’s transition into a general ent net. She’s helped in this regard already, having been instrumental in the net’s acquisition of “I Dreamed A Dream: The Susan Boyle Story” and the off-net rights to **HBO**’s “Curb Your Enthusiasm,” which debuts Mar 10.

In the States: **Mediacom** bowed its **Ultra 50** broadband service in Columbia and Springfield, MO, where customers may receive speeds of up to 50Mbps for an introductory price of \$99/month. Roll out of the service is also slated for markets in IA, IL, DE, FL and MN. -- Following the completion of its digital upgrade in the San Fran area, **Comcast** launched there **The Africa Channel**, **Ovation TV** and **Si TV** as part of its “World of More” analog-to-digital programming rollout.

Advertising/Marketing: **Bresnan** launched a dynamic VOD ad insertion trial with **Arris**, **Avail-TVN** and **BlackArrow** in Billings, Bozeman, Helena and Missoula, MT. -- The new season of **Lifetime**’s “Project Runway” (Thurs) will feature integration of **HP** PCs with Intel processors, as contestants will have the option to use computers to sketch designs for the 1st time in series history.

VOD: **Comcast** partnered with **HBO** to provide subs with exclusive on demand access to special content surrounding the net’s “The Pacific” (Mar), a 10-part miniseries from *Tom Hanks* and *Steven Spielberg* focused on WWII. As a lead-in to the mini-series, **HBO On Demand** will bring back “Band of Brothers” with a new ep weekly, and offer new companion content.

Programming: **NBCU**’s planned 835 hours of linear Vancouver Olympics coverage—a Winter Games record—includes 41 hours on **USA** (curling, ice hockey), 100 hrs on **MSNBC** (speed and figure skating) and 100 hrs on **CNBC** (ice hockey, biathlon). **Universal HD** will encore USA’s coverage. -- **TNT** renewed “Men of a Certain Age” for a 10-ep 2nd season. -- **Discovery**’s “Atlas 4D” (spring) extends the series with a 3-hr special featuring views of dynamic global regions such as the African Great Rift Valley, the Mediterranean and the islands of Hawaii, with visuals and graphics in 3D for the 1st time.

On the Circuit: The **Walter Kaitz Foundation** awarded more than \$725K to fund programs for the **Emma Bowen Foundation** and **NAMIC**. In years past, **WICT** has been among the grant recipients, but Kaitz said it didn’t request any funding this time. The Kaitz dinner moves back to NYC this fall as part of the newly re-christened Diversity Week (Sept 15, Hilton NY). -- **NCTA** is seeking 2010 Vanguard Award nominees. The awards, in their 45th year, will be presented as a special lunch during the **Cable Show** (May 13, L.A.). Nominations are due by Feb 24 (thecablesow.com).

People: Former **Cable Positive** head *Steve Villano* was named chmn/CEO of **EnCorps**, a program for putting math, science, engineering and tech pros in CA classrooms, reports *The Morning Bridge*. -- **Comedy Central** ap-

BUSINESS & FINANCE

pointed *Kent Alterman* to head of original programming and prod.

Public Affairs: Sportsman Channel and Safari Club Intl launch the 2nd national Hunt.Fish.Feed tour, with things kicking off in Vegas Tues with NV gov *Jim Gibbons*. The program has sportsmen donate game meat and fish to feed those struggling with hunger. The initiative will travel to 10 US cities.

Business/Finance: Blockbuster eliminated the final \$24mln of certain letters of credit it maintained on behalf of former parent **Viacom**. The letters covered potential liabilities for Viacom related to store leases that began before Blockbuster was spun off in '99. -- **Pali** analyst *Rich Greenfield* sees potential upside in his \$12.4bln '10 rev forecast for **Turner's** cable nets if **HBO** continues to deliver strong results and ratings improve at **TBS/TNT**. "We believe investors are far too concerned by (weak) short-term ratings trends at TBS/TNT, with a similar mistake having been made 18 months ago with Discovery Communications," wrote Greenfield. He also expects **DirectTV's** FCF to ramp from approx \$2/share last year to nearly \$4/share in '11, and accordingly upped to \$39 from \$32 his price target on DTV shares. He also expects **DirectTV's** FCF to ramp from approx \$2/share last year to nearly \$4/share in '11, and accordingly upped to \$39 from \$32 his price target on DTV shares.

CableFAX Daily Stockwatch

Company	01/14 Close	1-Day Ch	Company	01/14 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BRITISH SKY:	37.40	0.35	AMPHENOL:	45.29	0.29
DIRECTV:	33.54	0.04	AOL:	25.68	(0.56)
DISH:	20.19	(0.3)	APPLE:	209.43	(1.22)
DISNEY:	31.02	(0.27)	ARRIS GROUP:	11.53	0.09
GE:	16.70	(0.13)	AVID TECH:	13.88	0.29
NEWS CORP:	15.83	0.03	BIGBAND:	3.30	0.02
MSOS					
CABLEVISION:	27.41	0.54	BLNDER TONGUE:	1.15	0.03
COMCAST:	16.67	(0.1)	BROADCOM:	30.49	(0.38)
COMCAST SPCL:	15.93	(0.13)	CISCO:	24.95	0.31
GCI:	6.33	0.08	CLEARWIRE:	7.77	0.01
KNOLLOGY:	11.83	0.06	COMMSCOPE:	29.00	1.13
LIBERTY CAPITAL:	24.22	(0.13)	CONCURRENT:	4.16	0.11
LIBERTY GLOBAL:	23.04	(0.17)	CONVERGYS:	11.61	0.09
LIBERTY INT:	11.59	(0.04)	CSG SYSTEMS:	18.50	(0.16)
MEDIACOM:	4.76	(0.1)	ECHOSTAR:	19.65	0.04
RCN:	10.27	0.07	GOOGLE:	589.85	2.76
SHAW COMM:	20.09	(0.09)	HARMONIC:	6.67	0.10
TIME WARNER CABLE:	46.33	1.89	INTEL:	21.48	0.52
VIRGIN MEDIA:	17.42	0.31	JDSU:	8.39	0.04
WASH POST:	455.22	2.88	LEVEL 3:	1.45	(0.01)
PROGRAMMING					
CBS:	13.78	(0.21)	MICROSOFT:	30.96	0.61
CROWN:	1.50	(0.05)	MOTOROLA:	7.71	0.11
DISCOVERY:	31.73	(0.26)	OPENTV:	1.49	(0.02)
GRUPO TELEVISA:	20.69	0.04	PHILIPS:	31.00	0.25
HSN:	19.71	(0.4)	RENTRAK:	18.18	(0.13)
INTERACTIVE CORP:	21.65	(0.1)	SEACHANGE:	6.60	0.09
LIBERTY:	37.91	(0.01)	SONY:	33.73	0.57
LIBERTY STARZ:	50.09	(0.18)	SPRINT NEXTEL:	3.69	(0.31)
LIONSGATE:	5.51	0.02	THOMAS & BETTS:	35.93	(0.27)
LODGENET:	6.14	0.13	TIVO:	10.14	(0.24)
NEW FRONTIER:	1.90	0.00	TOLLGRADE:	6.37	0.02
OUTDOOR:	5.48	(0.01)	UNIVERSAL ELEC:	25.82	(0.55)
PLAYBOY:	3.52	0.04	VONAGE:	1.60	0.00
RHI:	0.46	0.03	YAHOO:	17.12	0.22
SCRIPPS INT:	45.64	(0.4)	TELCOS		
TIME WARNER:	28.79	(0.23)	AT&T:	26.19	(0.45)
VALUEVISION:	4.94	(0.06)	QWEST:	4.47	(0.08)
VIACOM:	31.72	0.32	VERIZON:	31.22	(0.65)
WWE:	16.03	(0.05)	MARKET INDICES		
TECHNOLOGY					
3COM:	7.54	(0.02)	DOW:	10710.55	29.78
ADC:	6.48	(0.01)	NASDAQ:	2316.74	8.84
ADVANTAGE:	2.02	(0.01)			
ALCATEL LUCENT:	3.78	0.09			
AMDOCS:	28.43	0.56			

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TCA SPECIAL SECTION

TCA News Bites

HBO said *Spike Lee* will do a follow-up to his Emmy-winning Katrina film "When The Levees Broke." The untitled piece will bow in Aug, the 5th anniversary of Katrina. HBO Sports is planning docs on the Philadelphia Flyers of '74 and one about *Larry Bird* and *Magic Johnson*. HBO demonstrated its HBO GO service for TCA critics, providing 600 titles to HBO subs on their laptops. HBO on Demand offers 150 titles. -- **The Science Channel** is developing a series with mega-filmmaker *Steven Spielberg* to highlight efforts to rebuild the World Trade Center site of the Sept 11, 2001, terrorist attacks, announced gm *Deborah Adler Myers*. The 6-part series, fittingly called "Rebuilding Ground Zero," premieres in 2011. -- **TV Guide Net** announced it will run syndicated episodes of "Curb Your Enthusiasm" (premieres Mar 10) with "limited editing" to preserve creator *Larry David's* original vision. "Commercial break structure be damned, as we say to the ad sales team," said TV Guide Net pres *Ryan O'Hara*. *Curb* star *Cheryl Hines*, who attended the net's TCA lunch, applauded the move, noting that "Curb is not an exact science" and tends to spur episodes of varying lengths. "So I think that's going to make Larry very happy," she said. "And not a lot makes him very happy." -- **TLC** is indeed developing a show with *Kate Gosselin* of "Jon & Kate Plus 8" fame in the wake of her split with *Jon*. Evp, programming and dev *Steve Cheskin* said no specifics yet. -- In March **Planet Green** will move to a 24-hr programming cycle, up from 8 hrs, gm *Laura Michalchyshyn* said. Also in development: a project called "Treehugger TV" and a special with *Isabella Rosellini*.

TLC Highlights: Recovering drug addict *Kristina Wandzilak* told critics about "how addiction happens to good families and decent people all the time," which is also the main theme of **TLC's** "Addicted" (premieres Mar). *Wandzilak* tries to help 6 families, taking them from intervention to rehab to beyond. -- **TCA** is not only about new shows. **TLC** touted "What Not to Wear," which is about to reach its 250th ep. But it's not really about the clothes, its co-hosts said. "When you don't feel good about yourself, style is the first thing to go," *Stacy London* added. Now that the duo is in its 7th year on **TLC** and leaving their 30s, what's the clothing advice? As you reach 40 "stop being a trend ho," *Kelly* said.

BET Snapshot: Despite *Jon* and *Kate's* famous troubles, "Everybody Hates Chris" actor *Terry Crews* said he doesn't expect **BET's** reality show about his family life, "The Family Crews," (premieres Feb 21) to hurt his clan. "By doing this show, we improved as a family," he said. But when his unmarried 21-year-old daughter told him she was pregnant on camera, he admitted he might not have reacted as

calmly in private. "It's one of those things where you think, 'thank God there's a camera around,'" he joked. Meanwhile, **BET** defended "The Michael Vick Project" (premieres Feb 2) (Cameras follow the pro athlete and convicted animal abuser as he attempts a comeback). **BET** pres, original programming *Loretha Jones* said no one is beyond redemption. "We don't believe that as a network, and we don't think society believes that," she said.

Animal Planet Roundup: **Animal Planet** took some heat from critics wondering why it was giving "crazy people" a platform with its new show "Fatal Attractions" (premieres Mar 14) about those who raise exotic pets. Pres/gm *Marjorie Kaplan* said the net wants to show the associated dangers to discourage others. Some 20K big cats live in captivity, warned animal welfare policy expert *Josephine Martel*. "It's easier to get a tiger than it is to get a driver's license," she said. **Animal's** "River Monsters" (Apr premiere) host and biologist *Jeremy Wade* went through the horrors of predator fish in dangerous waters like the Amazon, warning men especially not to swim naked in some rivers because at least one fish "has a predilection of snacking on anything that's dangling in the water." Uh, good to know.

More Discovery Nets: The highlight of **Discovery's** 3-hr presentation had nothing to do with celebrity or people living unusual lives. HD clips and stills from the 11-part partnership with **BBC** "Life" (March premiere) indicated the follow-on to "Planet Earth" might be just as spectacular. 4 years in the making, *Life* will explore the habitats and the habits of Earth's inhabitants, with "intimate, personal stories" about animals, plants and insects, exec prod *Susan Winslow* said. Prickly critics badgered **Discovery** chief *Clark Bunting* over the choice of *Oprah Winfrey* as narrator, instead of *Sir David Attenborough*. *Bunting* said *Winfrey's* "iconic voice" would "open up" the material and she was a "big fan" of *Planet Earth*. -- Paralyzed scientist *Stephen Hawking* appeared via videotape to promote his mind-bending **Science Channel** series "Into the Universe" (Apr 10), telling critics he loves TV and joking that he's "still waiting for my invitation to 'Dancing with the Stars.'" -- A reality doc, "The Fabulous Beekman Boys," (June premiere on **Planet Green**) shows a pair of young, gay men chuck the city life to buy and run an organic farm. But one of the men argues "it's a passionate life change for us," says *Josh Kilmer-Purcell*. -- **Investigation Discovery's** "Prison Wives" delivered the goods, profiling 13 couples each of whom has a spouse in jail serving life sentences. **ID** chief *Henry Schleiff* said the series follows people dealing with the justice system, and "it's about something many of us don't know much about—love." The 13-part series premieres on Valentine's Day.

PROGRAMMER'S PAGE with Chad Heiges and Seth Arenstein

Going Global

NBC opens the curtain Sun (8pm ET) to the **Golden Globes**, at a time when the broadcast net really deserves a **Razzie** or 12 for bungling its late-night lineup. Or, perhaps the whole fiasco should be nominated for Best TV Drama, with particular thanks to *Conan O'Brien*. But we digress. Herewith, *Seth* and *Chad* review certain Globe categories and postulate winners. See GoldenGlobes.org/nominations for a complete list of nominees. **TV Drama:** I don't bother with broadcast TV, so I am clueless about "House." I pick "Mad Men" because it's deep. If it's pure entertainment you want, "Dexter" was brilliant, particularly *John Lithgow*. (SA)...All are worthy, but I just can't see voters going batty over "Mad Men" for a 3rd straight year. "Dexter" improved greatly this season and should earn the hardware. (CH) -- **Actress in a Drama:** Let's bask in the glory of another nearly all-cable category. It's hard to bet against *Sedgwick* or *Close*, but *Paquin's* been terrific, too. (SA)...The aforementioned leading ladies have earned the last 3 victories; I feel a broadcast "breakthrough" will occur as *Margulies* takes it. (CH) -- **Actor in a Drama:** I like *Hall's* work this year and *Paxton's* always strong, but *Hamm* was born to play Don Draper, although it took multiple auditions to convince **AMC** of that fact. (SA)...All the men carry their respective shows with elegance and aplomb, but even I'm not immune to *Baker's* charm and wit. (CH) -- **Supporting Actress in a Series/Mini/TV Film:** I think "Glee" will have a good night, but *McTeer* was a fine Mrs Churchill. (SA)...Typically dominated by premium cable, this category may deliver a mild surprise with *Byrne*. (CH) -- **Actress in a Mini/TV Film:** I think *Barrymore* wins for "Grey Gardens," although *Lange* was terrific opposite her and it's hard to bet against *Joan Allen*. (SA)...In painting a portrait of this category, I can't and won't look past Allen, who suffused *O'Keeffe* with vibrant color. (CH) -- **Actor in a Mini/TV Film:** I'm not a *Kevin Bacon* fan, but damn the cholesterol, Bacon was terrific as a hard-bitten Marine broken by the loss of a fellow warrior. (SA)...Move over Bacon, here's something a little stronger, if not leaner: With Allen, *Irons* completes a formidable duo in "O'Keeffe." (CH) -- **Supporting Actor in a Series/Mini/TV Film:** Oh, let it be *Lithgow*, but it'll probably be *Harris* or *Piven*. (SA)...If *Hamm* was born to play Draper, that claim absolutely applies to *Piven* and *Ari Gold*. (CH) -- **Actress in a Comedy or Musical:** Yes, I know, it's *Fey's* to lose, but *Edie Falco's* complicated, pill-popping nurse might be what the doctor ordered to make Tina taste lemons. (SA)...Fey may be felled while going for 3 straight, with *Collette* the pick for her admirable versatility. If *Cox* inexplicably claws to a win, there must be a different version of "Cougar" airing across the pond. (CH)

Worth a Look: Food Tech, pilot, Trs, 9p ET, **History**. Yes, history is made daily, so is food. This informative series begins by deconstructing the cheeseburger, beginning with 1200-lb cattle, a bakery that produces 50K dozen buns daily. And some history: *Upton Sinclair's* meaty tome *The Jungle* is mentioned and we learn Roman soldiers ate sesame seeds for energy. SA

Basic Cable Rankings (1/04/09-1/10/09) Mon-Sun Prime			
1	USA	2.6	2561
2	DSNY	1.7	1680
2	TNT	1.7	1661
2	FOXN	1.7	1631
5	NAN	1.5	1540
6	A&E	1.3	1290
6	TBSC	1.3	1258
8	FAM	1.1	1128
8	HGTV	1.1	1107
8	ESPN	1.1	1061
11	FX	1	995
11	FOOD	1	970
11	TRU	1	932
11	HALL	1	913
15	DISC	0.9	918
15	TOON	0.9	912
15	TLC	0.9	907
15	HIST	0.9	902
15	SYFY	0.9	857
20	AMC	0.8	795
20	MTV	0.8	795
20	LIFE	0.8	778
20	SPK	0.8	750
20	NKJR	0.8	607
20	LMN	0.8	589
26	CMDY	0.7	687
26	BET	0.7	648
28	EN	0.6	594
28	VH1	0.6	576
28	BRAV	0.6	556
28	TVLD	0.6	552
28	MSNB	0.6	543
28	OXYG	0.6	428
28	NGC	0.6	388
35	CNN	0.5	483
35	HLN	0.5	457
35	GSN	0.5	342
35	ID	0.5	303
39	APL	0.4	419
39	TTC	0.4	418
39	ESP2	0.4	397
39	CMT	0.4	339
39	WGNA	0.4	288
39	SOAP	0.4	277
45	TWC	0.3	296
45	WE	0.3	255

*Nielsen data supplied by ABC/Disney

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