

CableFAX Daily™

Thursday — February 19, 2009

What the Industry Reads First

Volume 20 / No. 031

Numbers Game: Comcast Stressing Dollars Over Customers

Following similar results from **Time Warner Cable**, **Comcast's** 4Q spotlights big cable's altered business tack amid the worst economic storm in decades. The primary goal (at least for the pair) is now solid financial performance, and although Comcast performed well in 4Q and '08, it's unclear whether investors will stop focusing on sub adds. Comcast shares fell 4% to close at \$12.36, a new 52-wk low. "We have plenty of work to do to be as competitive as possible in this challenging environment... but achieving the right balance between growth and cash flow over the long term is really our goal," said COO *Steve Burke*. He cited as key RGU preservation, ARPU growth and rev maximization. For example, Comcast's combined net basic video (-233K), HSD (184K) and phone (340K) adds totaled just 291K in 4Q, by far the lowest total of the last 12 Qs. But the MSO delivered 3% growth in video rev, 9% in HSD rev and 38% in phone rev. Plus, ARPU rose 9% to \$114, and business rev jumped 47%, said CFO *Michael Angelakis*, with HSD costs down 20% per customer and phone costs down 33%. Burke said Comcast saw fewer connects than expected—but also fewer disconnects; no mass downgrades of services; and no material increase in bad debt. "We're clearly seeing the phones ringing more than they were in, say, October or November [and] we're clearly seeing some of our new promotions doing well," he said. But Burke said the faltering ad market remains soft, hammering the local segment and starting to affect Comcast's national cable nets. Then there are the 3300 jobs the MSO trimmed recently, its \$600mln write-down of its **Clearwire** investment, and a foundering stock price. Even so, CEO *Brian Roberts* said "we have a strong financial position, we made adjustments to anticipate the slower growth, [and] we're proactively managing our expenses."

DTV Doings: By Wed afternoon, no reports of rioting over 421 stations cutting off their analog signals (most at midnight) on Tues. Call volume was lighter than expected, although officials expected more activity Wed evening as people returned home from work and school. The **FCC's** consumer helpline garnered 28,315 calls Tues—up 37% from Mon's 20,673.

NAB estimates 12.4mln over-the-air HHs are located in impacted markets. Call volume on Sat and Sun didn't break 10K, the FCC said. Preliminary results for Wed indicated an increase in calls of about 5%, with the call center receiving 6750 calls from midnight to 11am. Many consumers didn't know they should run the "scan" function on the DTVs or converter boxes after a station changed its digital channel. NAB said early results from markets where broadcasters have com-

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Source: Nielsen Media Research, Standard Prime Time BP-11P Mon-Sun, based on Nielsen calendar years, 1996-2008

Scrippsnetworks



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pleted the switch are “encouraging.” After switching mid-day yesterday, three stations in Madison, Wis., got about 400 total calls, mostly requests for help with antennas or converter boxes, the trade group reported. Many viewers had been mistakenly watching analog on their HD sets. Meanwhile, Reps *Joe Barton* (R-TX) and *Cliff Stearns* (R-FL) continued to whack the *Obama* administration for the delay. “Millions of viewers now expect that the switch will simply move from one date to another; instead, it will occur almost willy-nilly over a period of months,” the lawmakers wrote in a letter to the FCC and **NTIA**. They wrote the agencies Wed asking them to prioritize over-the-air only HHs between now and the June 12 hard date. Specifically, they want the NTIA to put OTA homes first in line for converter box coupons. **Nielsen** said Wed that about 5mln (4.4% of all homes) are not ready for the transition, an improvement of more than 800K since early Feb. Albuquerque-Santa Fe continued to be the least prepared, with just under 12% of HHs completely unready.

Mobile Broadband: **Clear**'s first-to-market advantage now has a finite—and shrinking—lifespan. After **AT&T** announced Mon its intentions to roll out in '11 wireless services based on **LTE** tech, the main rival to **WiMAX**, **Verizon** followed with news of planned LTE product availability next year and named **Ericsson** and **Alcatel-Lucent** as its primary network vendors for initial deployments. Also in the works is the **Verizon LTE Innovation Center** to push the tech forward. **Clearwire** argued that it has “better speeds and bandwidth than what is being described as next year's LTE networks.” Amid speculation that Clearwire lacks sufficient funds to complete buildouts, the company said it's moving “full speed ahead with plans to introduce new mobile WiMAX markets, services and devices this year.” CEO *Brian Roberts* said **Comcast** will amp its Clear activity in certain key markets in this year's 2nd half, and downplayed any concerns with Clearwire's financial wherewithal. There's “a fair amount of runway to now go and construct many cities in the mode that [Clearwire is] now building Portland,” he said. Clearwire reports earnings Mar 5.

Retrans: **DISH** secured a retrans deal with **CBS** for its O&Os along with premium net **Showtime**. The deal includes compensation, according to a CBS rep, but details weren't provided.

At the Portals: Cable operators got a reprieve from ex-FCC chmn *Kevin Martin*'s good-bye gift, with the FCC giving 9 operators more time to respond to proposed fines for allegedly failing to fully comply with an FCC order to provide info on their migration of analog channels to digital. The original order required the operators to appeal or pay the fines this week, but the FCC on Tues extended the reply period until Mar 20. Ops involved include **Cablevision**, **Comcast** and **Suddenlink**. -- Cable told the **FCC** this week that the proposed survey to help determine when the 70/70 test has been met would impose unjustified burdens on the cable industry. The so-called 70/70 test is the point when cable availability and cable subscribership both exceed 70%, thus allowing the FCC to set new rules for diversity of information sources. “At a time when this data undoubtedly will confirm that cable subscribership is nowhere close to the 70% of HHs that would meet the 2nd prong of the test, such burdens are especially unjustified,” **NCTA** told the Commission in a filing late Tues. The proposed form would collect additional sub data from operators, including the number of total subs (even if they take just phone of data). **ACA** also called the survey onerous, particularly for its small operator members. -- **CEA** is asking the full **FCC** to review a Media Bureau decision granting **Cablevision** a set-top integration ban waiver through Dec '10, providing it deploys downloadable security tech. CEA says there's not enough public info on the tech to know if it meets FCC rules.

Comcast Notebook: With nearly 15mln subs, **Comcast** has surpassed **AT&T** as the largest provider of broadband services in the US, and in 4Q drew 65% of its HSD adds from DSL, said COO *Steve Burke*. The MSO's goal now is to



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provide speeds of at least 12Mbps in the lion's share of its footprint and speeds from 50-100Mbps in as many places as possible. "Speed really matters in this business, particularly when you see more video on the Internet... that get better with more speed," said Burke. The MSO plans to roll out DOCSIS 3.0 to 65% of its footprint by YE, up from 30% currently.

Board Room: Time Warner Cable elected *Donna James (Lardon & Assoc consultant), Edward Shirley (vice chmn of P&G's Global Beauty and Grooming biz)* and former Sen *John Sununu* to its board. *Glenn Britt* was named to the additional position of chmn, and *Peter Haje* becomes lead dir. *Don Logan* will step down as chmn but remain on the board. As previously announced, **Time Warner's Jeff Bewkes** will leave the Board. These appointments are effective upon Time Warner Inc's separation, which is expected by the end of the quarter.

People: Ex-Nokia Siemens exec *Raj Beri* was named vp, wireless product ops for **Cox**. -- *Fran Shammo* was named pres, **Verizon Business**, effective Mar 1. -- **ION Media Nets** appointed *Leslie Glenn Chesloff* evp, programming.

On the Circuit: **CTAM Mark Awards** entries are due Mar 24. There is a late deadline of Apr 7, but additional fees apply. Apply online at www.markawards.com. Winners will be announced at **CTAM Summit**, Oct 26, Denver.

CableFAX Daily Stockwatch

Company	02/18 Close	1-Day Ch	Company	02/18 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
BROADCASTERS/DBS/			AMDOCS:	18.27	0.30
BRITISH SKY:	26.07	0.16	AMPHENOL:	26.41	(0.03)
DIRECTV:	21.47	(0.57)	APPLE:	94.37	(0.16)
DISH:	11.98	(0.57)	ARRIS GROUP:	6.74	(0.06)
DISNEY:	17.63	(0.21)	AVID TECH:	10.21	0.05
GE:	10.86	0.05	BIGBAND:	4.81	(0.19)
HEARST-ARGYLE:	2.90	(0.15)	BLNDER TONGUE:	0.75	(0.08)
NEWS CORP:	6.78	(0.04)	BROADCOM:	17.67	0.47
MSOS					
CABLEVISION:	12.28	(0.72)	CISCO:	15.37	0.08
CHARTER:	0.03	0.00	CLEARWIRE:	3.45	(0.08)
COMCAST:	12.36	(0.53)	COMMSCOPE:	13.91	0.45
COMCAST SPCL:	11.58	(0.51)	CONCURRENT:	3.51	(0.05)
GCI:	5.98	(0.01)	CONVERGYS:	6.78	(0.1)
KNOLOGY:	4.89	(0.12)	CSG SYSTEMS:	14.39	(0.34)
LIBERTY CAPITAL:	5.35	0.05	ECHOSTAR:	15.35	(0.18)
LIBERTY ENT:	17.22	(0.69)	GOOGLE:	353.11	10.45
LIBERTY GLOBAL:	11.89	(0.71)	HARMONIC:	5.72	0.08
LIBERTY INT:	3.17	0.09	INTEL:	13.36	0.15
MEDIACOM:	3.82	(0.45)	JDSU:	3.27	(0.06)
SHAW COMM:	15.07	(0.56)	LEVEL 3:	0.80	(0.11)
TIME WARNER CABLE:	17.52	(0.1)	MICROSOFT:	18.12	0.03
VIRGIN MEDIA:	4.38	(0.22)	MOTOROLA:	3.63	(0.07)
WASH POST:	396.49	(3.81)	OPENTV:	1.08	(0.02)
PROGRAMMING					
CBS:	5.13	(0.12)	PHILIPS:	17.56	(0.17)
CROWN:	1.77	0.01	RENTRAK:	11.02	(0.23)
DISCOVERY:	13.07	(0.42)	SEACHANGE:	5.86	(0.28)
EW SCRIPPS:	1.50	(0.07)	SONY:	17.21	(0.15)
GRUPO TELEVISA:	12.16	(0.18)	SPRINT NEXTEL:	2.71	(0.05)
HSN:	4.04	(0.37)	THOMAS & BETTS:	24.87	0.20
INTERACTIVE CORP:	14.80	0.02	TIVO:	6.85	(0.17)
LIBERTY:	21.28	0.12	TOLLGRADE:	5.85	0.09
LODGENET:	0.65	0.04	UNIVERSAL ELEC:	13.07	1.07
NEW FRONTIER:	1.64	0.00	VONAGE:	0.37	(0.02)
OUTDOOR:	3.95	(0.21)	YAHOO:	12.22	0.20
PLAYBOY:	1.55	0.05	TELCOS		
RHI:	3.60	(0.15)	AT&T:	22.96	(0.26)
SCRIPPS INT:	21.08	0.42	QWEST:	3.32	(0.17)
TIME WARNER:	7.94	(0.03)	VERIZON:	28.07	(0.19)
VALUEVISION:	0.19	0.00	MARKET INDICES		
VIACOM:	16.53	(0.47)	DOW:	7555.63	3.03
WWE:	9.49	0.23	NASDAQ:	1467.97	(2.69)
TECHNOLOGY					
3COM:	2.38	(0.11)			
ADC:	3.10	(0.11)			
ADVANTAGE:	1.70	(0.02)			
ALCATEL LUCENT:	1.57	(0.03)			

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Think about that for a minute...

Broadband Spending

As part of the new broad stimulus package, Congress has designated \$7.2 billion for broadband. It's going to be a real challenge spending it wisely.

The underlying question is what the money is really intended to accomplish. Of course, being in the stimulus package, it's in part intended to create jobs and an economic resuscitation. But it's also true that there's a fundamental policy reason for this spending: the desire to promote and extend the benefits of broadband communications to all parts of the country.



Steve Effros

Part of that policy impetus is fueled by the belief that broadband is developing into the new infrastructure backbone that every country and community needs to compete. Can't argue with that. But another part is because of the somewhat skewed notion that the United States is "behind"

in the "race" over broadband deployment. I've written a lot about that and, as you know, think that argument is badly overblown, with misleading numbers being used to create a political impression intended to promote government intervention.

Regardless of why, however, the money is now here, and it will be spent. The two entities responsible for the spending are the National Telecommunications and Information Administration, the NTIA, and the Rural Utilities Service, the RUS, part of the Agriculture Department. There was an effort in the Senate draft of the bill to have the NTIA administer all the funds, and I'm sorry that didn't happen, because the NTIA can at least look at the issues from the point of view of telecommunications rather than the somewhat dated and highly bureaucratic view of the RUS, which has dealt with the telephone utilities in rural areas for years and shows no signs of wanting to deal with anyone else this time around. NTIA has \$4.7 billion to

administer, and the RUS has \$2.3B.

Not surprisingly, there's a focus on getting broadband deployed in rural areas. Most urban areas of the country already have multiple broadband distributors. I suspect when all is said and done, the administrators are going to be surprised to learn that, in fact, most rural areas already have competitive broadband infrastructures in place as well. The cable company and the telephone company are both capable of delivering broadband now, even in the most rural areas they serve. The question is really at what speed and at what price.

The RUS grants, or at least 75% of them, must go to projects in areas "without sufficient access to high speed broadband service to facilitate rural economic development." But what does that mean? How "high" does the speed have to be? And to confuse things even more, the money is prioritized to projects "...that will deliver end users a choice of more than one service provider." Well, if the telco is offering DSL, is that "high speed?" And if the cable operator proposes to deliver DOCSIS 3.0 by recovering bandwidth using MPEG4, isn't that even higher speed and more competition? Hopefully, the project proposals have to be reasonably economic, so the telco can't propose to build an entire new FTTC IP system and have the government pay the bill. But don't bet on it!

There are serious questions as to how wisely that money can be spent. Hopefully, the NTIA will work on the "middle mile" issues of getting economically reasonable broadband backbone connections to the rural areas, so we can focus on the "last mile" issues and not still be stymied even after that infrastructure is in place. Cable must be a very active participant in this research and allocation process.

Steve

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CableFAX

February 17, 2009

Dear Friends of CableFAX,

Spring Connection Week is coming soon, and CableFAX would like to partner with you to showcase your brands and messaging in the marketplace. From strategic branding to driving traffic to your booth during The Cable Show, CableFAX is planning a number of unique initiatives to connect you with your customers and maximize your business opportunities at Spring Connection Week in our hometown, Washington, DC, in April.

Please contact us to discuss the following partnerships with CableFAX:

Kicking Off Spring Connection Week, our **CableFAX Event** on March 30 will bring the community together to honor the FAXIES finalists, the top cable marketing and pr campaigns and The Leading Women in Cable. At the Event, we will celebrate CableFAX's 20th Anniversary with a tribute to Paul Maxwell. The Event on March 30 will be held at the National Press Club in Washington, DC. The FAXIES finalists are listed on the next page. Ask about sponsorship and key on-site and online exposure. Sponsorship Close: March 14.

CableFAX: The Magazine will publish 2 dedicated issues during Spring Connection week. The FAXIES/20th Anniversary Issue will include profiles of the top marketing and pr campaigns and a 20th anniversary section and dedication to CableFAX Daily founder Paul Maxwell. In honor of WICT's 30th Anniversary and Leadership Development Conference we will publish The Players: Leading Women in Cable Issue. Secure your placements in both publications benchmarking excellence and achievement. Ad Sales Close: March 3.

CableFAX Daily will bring you special Spring Connection Week Show Coverage from our award-winning editorial team the week of April 1-5. Three day advertising packages are available. AD Sales Close: March 24.

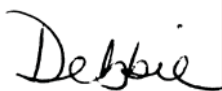
Online Coverage of The Cable Show at cable360.net and Cablefax.com, The Skinny from CableFAX, before, during and after the Show.

Distribution: CableFAX: The Magazine and CableFAX Daily will be distributed to attendees of The Cable Show (room drops, editorial panels, bins and more), at the FAXIES event on March 30 and the WICT Leadership Conference, and to more than 20,000 cable executives in print and digital format.

What are your goals during Spring Connection Week? We want to be part of your team to achieve your objectives. Please contact us at your earliest convenience to secure your unique spot with the industry's most trusted information source, CableFAX.

Thank you in advance, we look forward to serving you.

Warm Regards,



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The award winners will be announced at a March 30th awards luncheon at the National Press Club in Washington, DC and in *CableFAX: The Magazine/CableFAXIES Awards Issue* released during the luncheon. Congratulations to the finalists. See you March 30th!

Advertising Campaign For a Network

- ABC Family for A New Kind of... ABC Family Branding Campaign
- Big Ten Network for Tom, Dick & Harry Advertising 2008 Football & Basketball Campaign
- Fuse for Music Is...

Advertising Campaign for a Single Program

- A&E Television for Gene Simmons's Family Jewels - Season 3
- A&E Television for The Andromeda Strain
- ABC Family for The Secret Life of the American Teenager Series Launch
- Cablevision S.A.D.E C. V. for Mujeres Asesinas Mexico/ Assassin Women Mexico
- Discovery Communications Animal Planet for Whale Wars Series Launch Campaign
- ESPN for ESPN's "SportsCenter AM Live" Campaign
- Gospel Music Channel for Gospel Dream Bus Tour Presented by Comcast
- IFC for Z Rock

Annual Report

- Liberty Global for Liberty Global's Summary Annual Report
- The Cable Center for Cable Center 2007 Annual Report

Community Relations

- The Cable Center for Cable Center 2007 Annual Report Community Relations
- Big Ten Network for Support Local Flood Relief: Make a Difference With Mediacom, Big Ten Network, Fox Cable Networks and University of Iowa
- Cox Communications Las Vegas for Violence in our Schools - A Prescription for our Community
- Discovery Communications for Science Matters!
- Retirement Living TV for Countdown to Conversion: Digital Transition Education Initiative
- Time Warner Cable for Time Warner Cable Trivia Thursdays
- WWE for WWE Smackdown Your Vote!

Corporate Social Responsibility/Green Campaign

- A&E Television Network for The Recovery Project
- Big Ten Network for Big Ten Network Iowa Flood Relief Fundraiser
- Outdoor Channel for Get Out and Vote PSAs
- The Sportsman Channel for Hunt. Fish. Feed

Direct Response Marketing

- Charter Communications for Membership Acquisition Campaign
- Charter Communications for Charter Price Guarantee 2009

Integrated Marketing Campaign

- Big Ten Network for 2008 Football & Basketball Campaign
- Charter Communications for Charter Digital Transition 2009
- Cox Communications for 2008 Wave 3 Cox Business Acquisition Campaign
- The Weather Channel for "When Weather Changed History" Season 2

Marketing Campaign

- A&E Television for A&E Brand Repositioning Campaign
- A&E Television for Gene Simmons's Family Jewels - Season 3
- BBC America for BBC World News America
- Cartoon Network/Turner Broadcasting Inc for Cartoon Network Universe: Fusion Fall Launch
- Spike TV for Star Wars on Spike TV
- Time Warner Cable - Los Angeles Region for Time Warner Cable Los Angeles Hispanic Video Package Launch

Marketing of a Continuing Series

- ABC Family for The Secret Life of the American Teenager Season 2 Launch
- AMC and NMA Entertainment & Marketing for Mad Men

Season Two

- BBC America for Robin Hood Season 2
- Oxygen for Tori & Dean: Home Sweet Hollywood
- Sundance Channel for ICONO Season 4
- World Wrestling Entertainment Inc for WWE McMahon's Million Dollar Mania Promotion

Marketing of a New Series or Show

- ABC Family for The Secret Life of the American Teenager Series Launch
- BBC America for Primeval
- Big Ten Network for Big Ten Network Illinois Football: The Journey
- Cartoon Network/Turner Broadcasting Inc for Star Wars: The Clone Wars Series Launch
- Discovery Communications - Animal Planet for Whale Wars Series Launch Campaign
- IFC for Z Rock

Marketing of a Documentary or Special Series

- A&E Television for The Andromeda Strain
- Big Ten Network for Big Ten Network Illinois Football: The Journey
- Cartoon Network/Turner Broadcasting Inc for Turkey, Stuffing and "Rickrolls" for all our "Friends" at Thanksgiving
- CNN for CNN Heroes

Marketer of the Year

- A&E Television Network - Guy Slattery
- ESPN - Katie Lacey
- Outdoor Channel - Denise Conroy-Galley
- Versus - Bill Bergofin
- WE tv - Kenetta Bailey

Marketing Team of the Year

- NBC Universal for "An Unbelievable Year at NBC Universal" Affiliate Marketing Team for TV Networks Distribution NBC Universal

Media Event

- ABC Family for Winter Wonderland
- CNN for CNN Grill
- Discovery Communications for Planet Green Launch Media Event in Los Angeles/Channel Launch
- ESPN for ESPN's 2008 Upfront Event
- Hallmark Channel for Hallmark Movie Channel HD Launch in Peoria
- The National Geographic Channel for Dog Whisperer 100th Episode Celebration

Media Relations Campaign

- ABC Family for Secret Life of the American Teenager
- Bravo for Real Housewives of Atlanta
- Discovery Communications for Planet Green Launch
- ESPN for NASCAR on ESPN
- History Channel for 102 Minutes that Changed America
- IFC for The IFC Media Project
- The National Geographic Channel for Expedition Week

Multicultural Marketing

- CNN for CNN Presents: Black in America
- Time Warner Cable - Los Angeles Region for Time Warner Cable Los Angeles Hispanic Video Package Launch
- TuTV for Noches Clasicas De Pelicula

PR Executive of the Year

- Braff Communications - Jim Weiss
- Discovery Communications/Planet Green - Annie Howell
- ESPN - Katina Arnold
- Rainbow Media Holdings - Theano Apostolou
- RCN - Richard Ramlall
- Showtime Networks - Richard Licata
- The National Geographic Channel - Russell Howard

PR Stunt

- A&E and NMA Entertainment & Marketing for The

- Andromeda Strain Decontamination Chamber
- BBC America for Robin Hood Season 2
- Cartoon Network/Turner Broadcasting Inc for Turkey, Stuffing and "Rickrolls" for all our "Friends" at Thanksgiving
- Outdoor Channel for Are You Ready for the Big Time? CTAM Stunt
- Oxygen for Welcome Home! Tori & Dean
- Starz Entertainment for I Know Who Killed Me

Press Kit

- ESPN for NASCAR on ESPN
- Showtime Networks for United States of Tara
- Showtime Networks for Dexter Season 3
- The National Geographic Channel for Human Footprint

Programming Stunt

- ABC Family for 25 Days of Christmas
- Comcast Entertainment Group for FEARnet's Halloween Campaign
- Comcast Entertainment Group for The Style Network's "Raise Your Hand and Make a Difference" Initiative in Support of Breast Cancer Awareness
- Discovery Communications for Science Channel's "Punkin Chunkin 2008"
- Retirement Living TV for Daily Café from the AARP Convention Floor
- Starz Entertainment for I Know Who Killed Me

Public Affairs Campaign

- IFC for The IFC Media Project
- Discovery Communications, Science Channel and Comcast for Science Matters!
- Insight Communications for Digital Transition Awareness Campaign
- Lifetime Television for Every Woman Counts
- Retirement Living TV for Countdown to Conversion: Digital Transition Education Initiative
- The Sportsman Channel for Hunt. Fish. Feed.
- WE tv for WE Vote 2008

Tchotchke

- ABC Family for 25 Days of Christmas Office Decorating Kit
- Big Ten Network for Election Buttons
- Discovery Communications for Science Channel's "Punkin Chunkin 2008"
- International Networks for Bridging Cultures:2009 International Networks Calendar
- Vozzcom for Guerilla Tactics for Tradeshow Branding Success

Trade Show Marketing and PR

- Comcast Entertainment Group for G4's CES Best of the Best
- Fuse for Fuse Upfront Bash '08
- Gospel Music Channel for Gospel Music Channel - NCTA 2008
- Outdoor Channel for Are You Ready for the Big Time? CTAM Stunt
- Qubo for Qubo Channel Playground

Video: Use of Video or Moving Image

- ABC Family for ABC Family Upfront Sizzle
- Charter Communications - Wisconsin for Ribbon of Promise Wisconsin Campaign to Prevent School Violence
- Outdoor Channel for Outdoor Channel Ad Sales Sizzle Reel
- Qubo for Qubo Channel Spot
- Visible World for Household Addressability
- WWE for Presidential Candidate Videos on WWE Monday Night Raw

Viral Marketing Campaign

- A&E Television for What Happened in Piedmont?
- BBC America for Skins
- CMT for Gone Country 3
- Discovery Communications - Animal Planet for Groomer Has It Series Launch
- The Sportsman Channel for Cable Best Friends Forever

To register for the March 30th CableFAXIES Luncheon • Visit www.CableFAX.com

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