

CableFAX Daily™

Monday — November 8, 2010

What the Industry Reads First

Volume 21 / No. 216

Here We Go Again: Same Song, Different (U-)Verse

AT&T U-Verse has joined **Cablevision** and **DISH** at the hard-ball club, surprising **Scripps** by pulling off **HGTV**, **Food**, **DIY**, **Cooking** and **GAC** around 1am ET Fri. **Travel**, still under its contract from **Cox's** ownership days, is still available to U-Verse's 2.7mln subs. U-Verse's Scripps contract expired Oct 31, but multiple extensions were granted and talks reportedly continued into Thurs evening. In fact, Scripps said it was and is willing to extend the current terms through the end of the year. AT&T claimed the offer wasn't under fair terms. "It became clear that Scripps was using the extensions simply to demand more and to go back on key terms that had already been agreed upon, and not to make progress and negotiate in good faith. We also offered a fair, shorter-term extension to Scripps that was refused," an AT&T spokesperson said. The telco said it didn't have the rights to deliver the channels and that Scripps is demanding it pay double what other competitors pay. Scripps Nets pres *John Lansing* countered that the problem wasn't price, but digital rights. "They were looking for fairly unlimited rights for video that was outside of any authenticated video," said Lansing, whose company has a fair amount of free video content available on the Web to non-subs. He said U-Verse wanted "unreasonably broad" video rights for emerging media where business models haven't been established and that an agreement in principle on distribution fees had been reached some time ago. This isn't U-Verse's first programming spat, with **Hallmark** and **Hallmark Movie** having been dark since Sept 1. Nor is it Scripps' 1st rodeo. Some 3mln **Cablevision** subs lost **Food** and **HGTV** for about 3 weeks earlier this year. AT&T said that Scripps refused to "put in writing key terms that had been agreed upon verbally" and that it has not provided a proposal that gives the telco a choice in the channels it carries. AT&T, which launched att.com/fighting4you, directed subs to a free preview of programming from **TLC**, **Bravo**, **Planet Green**, **ION Life** and **CMT Pure Country**.

Churn Burn: **DISH's** 3Q churn rate of 1.98% came in above analyst estimates of 1.8%, and was coupled with a loss of 29K subs. It's the 2nd straight Q of sub losses, with **DISH** losing 19K subs in 2Q after 4 consecutive Qs of net adds. And the **Fox** dispute that saw 19 **FSN** RSNs off the air for a month as well as **FX** and **Nat Geo** probably isn't going to help in 4Q. "Clearly the Fox dispute in the short term is going to have an impact," said **DISH** evp Tom Cullen. "During a programming interruption you are going to lose subscribers. The effect of that continues even after the programming

CableFAX
THE MAGAZINE

100
CableFAX

The annual **CableFAX 100** issue salutes cable's leaders, pioneers, influencers and rainmakers. The **Regional Top Players** will also be profiled.

Publication Date: December 9

Ad Close: November 9

Ad Materials: November 17

Print/Online Distribution at
www.cablefax.com

Bonus Event Distribution: The CableFAX 100 Awards Luncheon, December 9

Sponsor the CableFAX 100 Awards Luncheon, December 9, 12-2:30pm in NYC. Go to www.cablefaxmag.com for details on registration and sponsorship opportunities.



Advertising & Sponsorship Contacts:

Debbie Vodenos | Publisher | dvodenos@accessintel.com | 301.354.1695
Amy Abbey | Associate Publisher | aabbey@accessintel.com | 301.354.1629

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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.

Late Deadline: November 12, 2010 • Enter Online: www.CableFAX.com/BOW • Event: Spring 2011

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

Campaign Categories:

- Ad/Series of Ads
- Blog or Series of Blogs
- Community/Social Networking
- Contest/Online Games
- Corporate Social Responsibility/ Education
- Digital Marketing Campaign
- Digital PR Campaign
- Editorial Excellence - Overall
- Editorial Excellence - Special Section
- Email Newsletter/s
- Smartphone App

- Tablet App
- 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
- Virtual Tradeshow or Online Event
- Web Site Design
- Web Site Redesign

People Awards:

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

Best Websites:

- Cable Network - Small and Mid-Size (Fewer than 50mIn subs)
- Cable Network - Large (More than 50mIn subs)
- Regional/Local Programmers
- Technology and other Vendors

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

Mary Lou French
 CableFAX's Best of the Web Awards
 Access Intelligence
 4 Choke Cherry Rd, 2nd Fl
 Rockville, MD 20850

Deadline: November 5, 2010
Late Deadline: November 12, 2010
Event: Spring 2011

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. 5, 2010 and Nov. 12, 2010)
- Total \$ _____

The late entry fee must be applied to each individual entry postmarked after Nov. 5, 2010.
 * Payment in full must accompany the entry.
 ** If entering more than one category, please submit separate entry forms.

Payment Options

- Check (payable to Access Intelligence/CableFAX) Money Order
- Mastercard Visa Discover American Express

Credit Card # _____

Exp. _____

Print name of card holder _____

Signature _____

Entry fees are not refundable.
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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.
 Sponsorship Opportunities: Debbie Vodenos at 301-354-1695; dvodenos@accessintel.com or Amy Abbey at 301-354-1629; aabbey@accessintel.com.

CABLEFAX DAILY (ISSN 1069-6644) is published daily by Access Intelligence, LLC ● www.cablefaxdaily.com ● fax: 301.738.8453 ● Editor-in-Chief: Amy Maclean, 301.354.1760, amaclean@accessintel.com ● Exec Editor: Michael Grebb, 301.354.1790, mgrebb@accessintel.com ● Senior Online Editor: Chad Heiges, 301.354.1828, cheiges@accessintel.com ● Asst VP, Ed Director: Seth Arenstein, 301/354-1782, sarenstein@accessintel.com ● Publisher: Debbie Vodenos, 301.354-1695, dvodenos@accessintel.com ● Assoc Publisher: Amy Abbey, 301.354.1629, aabbey@accessintel.com ● Marketing Dir: Carol Brault, 301.354.1763, cbrault@accessintel.com ● Prod: Joann Fato, 301.354.1681, cdaily@accessintel.com ● Diane Schwartz/VP and Group Publisher ● Subs/Client Services: 301.354.2101, fax 301.309.3847 ● Group Subs: Carol Brault, 301.354.1763, cbrault@accessintel.com

comes back up because you have to reengage on both the activation and churn front.” No specific forecasts were given for the Fox impact, but DISH chief Charlie Ergen said the “short-term pain” was worth it in the long run. “That partnership now is very solid and long-term,” he said. While customer metrics were below analyst estimates, financials were a different story. 3Q profits did beat analyst estimates, rising to \$245mln from \$80.6mln a year earlier, and rev grew 11% to \$3.21bln. Collins Stewart called the results “mixed,” while Sanford Bernstein was focused on “shrinkage.” “The travails of the low end consumer poured cold water on Dish’s nascent recovery from the rough patch it had hit in 2009,” Sanford Bernstein said. Wells Fargo’s take: “ARPU was impressive, while churn, subs and SAC (\$795 per gross addition) were not. To us, it feels like Charlie sees a better return on investment from his own stock than from acquiring subs. Given higher SAC, this could be construed as a good decision.” Shares closed up about a half a percent Fri.

On the Hill: In case you’ve somehow missed it, Rep *Joe Barton* (R-TX) really, really wants to be chmn of the **House Commerce** cmte again. He tells **C-SPAN’s** “Communicators” (Sat, 6:30pm ET) that having served as chmn before, he is more experienced than other potential chmn *Fred Upton* (R-MI) and that Upton tends to be “somewhat more moderate” while he is consistently conservative. His number one goal will be repealing healthcare (or what he calls “Obamacare”), but another high priority will be “preventing the **FCC** from regulating the Internet.” Given the Republican election gains, Barton said he would hope the FCC’s Dems would see the wisdom of not trying to regulate broadband under Title II but that he’s willing to move a bill to stop it if need be. As for questions over whether he needs a waiver to term limit rules to serve, Barton tells the net that he believes he is eligible to serve 2 more terms as chmn and is asking for clarification from Republican leadership. He doesn’t think his time as the Committee’s ranking member counts against him, but if it does, he’ll ask for a waiver. -- As previously suggested, the **Sen Commerce Communications** subcmte reportedly plans to hold a hearing Nov 17 on retrans. Subcmte chmn *John Kerry* (D-MA) has drafted legislation that would prevent broadcast signals from being pulled until the **FCC** evaluates the behavior of the parties and recommends or does not recommend binding arbitration.

In the States: Now that the **Fox** programming spat is over, **Cablevision** can turn attention to its annual video rate increase. We told you it was coming (**Cfax**, 10/22). The average price hike for ’11 will be 2.88% and will take effect over the next few months. For the 8th consecutive year, there will be no price increase for HSD or phone. “We have worked hard and been successful in recent years holding our cable television price adjustment down to an average increase of about three percent, a trend that will continue in 2011, even given the impact of higher programming costs,” said *John Trierweiler*, Cablevision’s svp, prod mgmt. In Oct ’09, Cablevision announced an avg 3.7% increase for video in ’10. In Oct ’08, it announced a 3.5% increase for ’09. -- **Clearwire** is cutting 15% of its workforce (about 630 employees) as it faces a cash crunch at the end of the year. -- **T-Mobile** expanded the availability of its 4G network to include Chicago, Colorado Springs, Fort Wayne, IN, Louisville and Raleigh-Durham and Wilmington, NC. -- **MetroPCS** lit its 4G LTE service in L.A. and Philadelphia, upping coverage to 5 metro areas (Dallas, Detroit, Las Vegas).

New Products: **Cablevision** has several new services on the horizon, with its RS-DVR being launched this Q in NYC and plans to end its physical DVR purchases soon after the first launches. This month, it’s rolling out its PC-to-TV service for \$4.95/mo. In a few weeks, 2 new apps will be available: a multiplayer gaming service and iO Photos, which lets subs view **Facebook** photos on the TV after a 1-time log-in through their digital set-tops. -- **Time Warner Cable** expects to have whole-home DVR broadly available by year-end. It’s also rolling out its “Signature Home” offering beyond Charlotte. The bundle targets high APRU customers who want all of its best-of-class products and is much more personalized.

At the Portals: Still opposed to regulating broadband, **NCTA** told the **FCC** in reply comments Thurs that if the Commission does go that route, it must apply the same rules to wireless. The trade group continued to argue against applying regulations to managed services. “Restricting the ability of ISPs to offer specialized services would serve no public policy purpose and would only diminish the potential value of the Internet to consumers,” it said. “There is no evidence that the offering of such services will impair the quality, robustness and viability of broadband Internet access service.”

Advertising: As cable finishes counting up those midterm election dollars, chew on this: TV viewers were exposed to almost 1.48mln political ads in Oct, according to **Nielsen**. That’s more than the 1.41mln that aired during the Oct ’08 election. Cleveland viewers were exposed to the highest proportion (23.4%), while Jackson, MS, had the lowest (1%).

Technology: Latens and GoBackTV partnered for tech to help small- to medium-sized cable ops deliver IPTV services. Latens' content protection covers all networks to help minimize operating costs, and GoBack's providing unified iTV services across those same networks.

Programming: Tons of attention on **MSNBC** Fri after it suspended *Keith Olbermann* for contributing to 3 Democratic campaigns and thus violating **NBC News** ethics. Word of the three \$2,400 donations was 1st reported by *Politico*. Olbermann has said he never encouraged anyone else to donate to the campaigns. -- **Disney** will debut its **Disney Junior** pre-k brand in Feb with content across **Disney Channel**, the Web, VOD, mobile and paid download platforms. **SOAPnet** is slated to transition to a 24/7 Disney Jr linear net in '12. Debuting with the launch is "Disney Poetry Shorts," a series of short-form animation showcases of poems for kids set to imagery from classic Disney films. -- Do not adjust your sets. That really is **CNN's** *Wolf Blitzer* making a special presentation at the Soul Train Awards, presented on **BET** and **Centric** Nov 28, 9pm. -- **USA** greenlit pilots of "Eden," focused on a concierge at an elite NYC hotel, Vegas-based law procedural "Wild Card" and "Over/Under," spotlighting the forced career change of an expelled trader. -- **HGTV** licensed 26 eps of new series "Cash & Cari" featuring estate liquidator *Cari Cucksey*. -- **Spike** announced a 1-hour non-scripted series in which 12 of the world's best special forces operatives face off. "Most Lethal" will bow in the summer. -- **Cartoon's** 1st CGI movie, "Firebreather," debuts Nov 24 at 7pm.

Public Affairs: In an effort to educate teens on Internet Safety, the **Ad Council** announced a new collaborative initiative dubbed the **Internet Safety Coalition**. Members include Comcast, **AT&T**, **AOL**, **Google**, **NCTA**, **Time Warner** and others. Creative materials feature the tagline, "If you wouldn't wear it, don't share it." Members will incorporate the messages into marketing and communications.

Honors: **ESPN/ABC's** *George Bodenheimer* was awarded the **Francis Bagnell Award** from the Maxwell Football Club for his contributions to the game of football. The Club noted ESPN's new tech innovations and commitment to developing multiplatform digital media offerings.

Editor's Note: A few upcoming opportunities: In our Nov 16 Webinar, we'll bring together crisis communications experts to discuss how to navigate PR battles that play out publicly (sound familiar?), as well as general best practices. More info at http://www.cablefax.com/cfp/webinars/2010_nov16.html. -- On Dec 8, **CableFAX** will host a comprehensive, day-long workshop in NYC all about social media's new tools and techniques. Limit of 25 attendees. This is not one to miss. Info here: <http://www.cablefax.com/cfp/training-20101208.html>. -- On Dec 9 and 10, it's party time when we host our **CableFAX 100** luncheon and **Most Powerful Women** breakfast, respectively. Don't forget the **Lustgarten Foundation's** Rock & Roll Bash the night of Dec 9 to benefit pancreatic cancer research, featuring **Cablevision** CEO *Jim Dolan's* band JD & The Straight Shot. For registration or sponsorship info: <http://www.lustgarten.org/Page.aspx?pid=958>. -- Time for a 3DTV update! Join us for a Dec 15 Webinar on 3DTV. Speakers to be announced soon. More info: http://www.cablefax.com/cfp/webinars/2010_dec14.html?clearCache.

People: **Discovery** promoted *Elisa Freeman* to svp, global distribution ops and education biz dev. -- **Turner Sports** upped *Mark Johnson* to vp, biz ops, **NCAA Digital** and **PGATour.com**, *Tom Sahara* to vp, ops and tech and *Pete Scott* to vp, emerging media. -- **WICT** named *Christina Vergara* vp, edu and program dev. -- *Lara Spotts* was promoted to vp, East Coast dev for **Bravo**.

Business/Finance: **Windstream** reached a deal to buy **Hosted Solutions** from **ABRY Partners** in an all-cash transaction valued at \$310mln. DH Capital served as Hosted's financial adviser. The deal is expected to close in 4Q. -- **Disney** agreed to sell **ABC** stations in Flint, MI, and Toledo, OH, to **SJL Broadcasting**. The stations will remain ABC affils.

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CableFAX Week in Review

Company	Ticker	11/05 Close	1-Week % Chg	YTD %Chg
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BROADCASTERS/DBS/MMDS
 DIRECTV:.....DTV.....42.72.....(1.68%).....28.10%
 DISH:.....DISH.....20.81.....4.73%.....0.19%
 DISNEY:.....DIS.....37.20.....2.99%.....15.35%
 GE:.....GE.....16.73.....4.43%.....10.58%
 NEWS CORP:.....NWS.....16.33.....1.49%.....2.58%

MSOS
 CABLEVISION:.....CVC.....28.70.....8.34%.....11.15%
 CHARTER:.....CHTR.....35.72.....9.98%.....0.00%
 COMCAST:.....CMCSA.....21.04.....1.99%.....24.79%
 COMCAST SPCL:.....CMCSK.....19.86.....2.58%.....24.05%
 GCI:.....GNCMA.....10.97.....4.98%.....71.94%
 KNOLOGY:.....KNOL.....14.25.....(1.18%).....30.49%
 LIBERTY CAPITAL:.....LCAPA.....59.21.....2.90%.....147.95%
 LIBERTY GLOBAL:.....LBTYA.....39.43.....4.40%.....80.13%
 LIBERTY INT:.....LINTA.....15.28.....3.52%.....40.96%
 MEDIACOM:.....MCCC.....7.03.....1.88%.....57.27%
 SHAW COMM:.....SJR.....21.65.....1.26%.....5.25%
 TIME WARNER CABLE:.....TWC.....62.05.....7.22%.....49.92%
 VIRGIN MEDIA:.....VMED.....26.62.....4.68%.....58.17%
 WASH POST:.....WPO.....398.38.....(0.94%).....(9.38%)

PROGRAMMING
 CBS:.....CBS.....17.01.....0.47%.....21.07%
 CROWN:.....CRWN.....2.70.....(7.53%).....86.21%
 DISCOVERY:.....DISCA.....41.11.....(7.97%).....34.04%
 GRUPO TELEVISIA:.....TV.....23.17.....3.21%.....11.61%
 HSN:.....HSNI.....26.24.....(12.36%).....29.97%
 INTERACTIVE CORP:.....IACI.....28.58.....2.44%.....39.55%
 LIBERTY:.....L.....40.08.....1.49%.....10.26%
 LIBERTY STARZ:.....LSTZA.....64.36.....(1.89%).....39.46%
 LIONSGATE:.....LGF.....7.34.....(1.21%).....26.33%
 LODGENET:.....LNET.....3.02.....18.43%.....(45.39%)
 NEW FRONTIER:.....NOOF.....1.89.....9.25%.....0.00%
 OUTDOOR:.....OUTD.....6.10.....6.09%.....5.17%
 PLAYBOY:.....PLA.....4.91.....1.24%.....53.44%
 SCRIPPS INT:.....SNI.....52.67.....3.50%.....26.92%
 TIME WARNER:.....TWX.....31.34.....(3.6%).....7.55%
 VALUEVISION:.....VVTV.....2.34.....0.00%.....(51.25%)
 VIACOM:.....VIA.....43.82.....2.43%.....39.11%
 WWE:.....WWE.....14.07.....1.66%.....(8.22%)

TECHNOLOGY
 ADC:.....ADCT.....12.68.....0.12%.....104.11%
 ADVANTAGE:.....AEY.....3.23.....0.94%.....63.96%
 ALCATEL LUCENT:.....ALU.....3.28.....(5.75%).....(1.2%)
 AMDOCS:.....DOX.....26.97.....(12.09%).....(5.47%)
 AMPHENOL:.....APH.....52.88.....5.49%.....14.51%
 AOL:.....AOL.....24.92.....(6.6%).....7.04%
 APPLE:.....AAPL.....317.13.....5.37%.....50.49%
 ARRIS GROUP:.....ARRS.....10.13.....8.81%.....(11.37%)
 AVID TECH:.....AVID.....13.36.....5.86%.....4.70%
 BIGBAND:.....BBND.....3.28.....10.44%.....(4.65%)
 BLNDR TONGUE:.....BDR.....2.09.....(10.3%).....83.33%
 BROADCOM:.....BCRM.....42.34.....3.70%.....34.54%
 CISCO:.....CSCO.....24.26.....6.12%.....1.34%
 CLEARWIRE:.....CLWR.....6.93.....(2.26%).....2.51%
 COMMSCOPE:.....CTV.....31.45.....(0.66%).....18.55%

Company	Ticker	11/05 Close	1-Week % Chg	YTD %Chg
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CONCURRENT:.....CCUR.....4.78.....(24.61%).....20.71%
 CONVERGYS:.....CVG.....11.89.....4.85%.....10.60%
 CSG SYSTEMS:.....CSGS.....20.20.....3.86%.....5.81%
 ECHOSTAR:.....SATS.....21.65.....2.12%.....7.50%
 GOOGLE:.....GOOG.....625.08.....1.85%.....0.82%
 HARMONIC:.....HLIT.....6.78.....(2.87%).....7.28%
 INTEL:.....INTC.....21.24.....5.94%.....4.12%
 JDSU:.....JDSU.....11.40.....8.57%.....38.18%
 LEVEL 3:.....LVLT.....0.91.....0.00%.....(40.52%)
 MICROSOFT:.....MSFT.....26.85.....0.71%.....(11.91%)
 MOTOROLA:.....MOT.....8.20.....0.49%.....5.67%
 RENTRAK:.....RENT.....27.12.....(0.11%).....53.48%
 SEACHANGE:.....SEAC.....8.34.....3.73%.....27.13%
 SONY:.....SNE.....33.40.....(1.3%).....15.17%
 SPRINT NEXTEL:.....S.....3.99.....(3.16%).....9.02%
 THOMAS & BETTS:.....TNB.....45.58.....4.66%.....27.35%
 TIVO:.....TIVO.....11.16.....0.09%.....9.63%
 TOLLGRADE:.....TLGD.....8.29.....4.28%.....35.68%
 UNIVERSAL ELEC:.....UEIC.....27.87.....32.34%.....20.03%
 VONAGE:.....VG.....2.33.....(8.63%).....66.43%
 YAHOO:.....YHOO.....16.27.....(1.36%).....(3.07%)

TELCOS
 AT&T:.....T.....29.27.....2.63%.....4.42%
 QWEST:.....Q.....6.80.....2.87%.....61.52%
 VERIZON:.....VZ.....33.43.....2.92%.....0.91%

MARKET INDICES
 DOW:.....DJI.....11444.08.....2.93%.....9.74%
 NASDAQ:.....IXIC.....2578.98.....2.85%.....13.65%
 S&P 500:.....GSPC.....1225.85.....3.60%.....7.09%

WINNERS & LOSERS

THIS WEEK'S STOCK PRICE WINNERS

COMPANY	CLOSE	1-WK CH
1. UNIVERSAL ELEC:.....	27.87	32.34%
2. LODGENET:.....	3.02	18.43%
3. BIGBAND:.....	3.28	10.44%
4. CHARTER:.....	35.72	9.98%
5. NEW FRONTIER:.....	1.89	9.25%

THIS WEEK'S STOCK PRICE LOSERS

COMPANY	CLOSE	1-WK CH
1. CONCURRENT:.....	4.78	(24.61%)
2. HSN:.....	26.24	(12.36%)
3. AMDOCS:.....	26.97	(12.09%)
4. BLNDR TONGUE:.....	2.09	(10.3%)
5. VONAGE:.....	2.33	(8.63%)

CableFAX's Top Case Studies in Cable Marketing & PR Guidebook

THIS ONE OF A KIND BOOK, from the publisher of CableFAX, exemplifies how cable programmers, operators and vendors cut through the clutter to mount PR and Marketing efforts that worked, gained revenue, ratings points and industry buzz. Each study demonstrates some facet of ingenuity, innovation or integrated thinking, illuminating communications as a function that has matured with poise and established its indispensability to business practices.



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