

# Cablefax Daily™

Tuesday — March 31, 2015

What the Industry Reads First

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## WWE Slam: It's Not Always Easy Going OTT

Before HBO, CBS or Nick announced their SVOD OTT product, there was **WWE Network**. On Mon, WWE announced that its OTT network has surpassed 1.3mln subs following WrestleMania 31. And while that's a 31% increase over the 1mln subs it announced Jan 27 and a record for its WrestleMania (which was carried on the OTT net as well as PPV), shares of WWE plummeted nearly 15%. Huh? A sign of the uncertain world of OTT? Possibly spooking investors were management comments Mon that its numbers could show seasonality with subs leaving after big events. WWE did not announce PPV totals for WrestleMania (that should be available in a few days). CSO/CFO *George Barrios* said WWE sub growth could be sequential or follow the seasonal cycle of its PPV business, which would "still deliver year-over-year growth." The 1.3mln subs is double what WWE Network had in April 2014 for WrestleMania 30. WWE believes free trials are working well. A Feb free promotion attracted 201K trial subs, of which 77% converted to paying in March (WWE declined to say how many of the subs who joined during Nov's free trial are paying subs today). It's going the free trial route again with any sub who registers in Apr receiving the net for free that month. Management sounds pretty wedded to the \$9.99 price point for now. For example, WWE is not interested in 2 price points, one that includes big events like WrestleMania and one that doesn't. Meanwhile, WWE Network announced 8 new series, including its 1st adult comedy "Camp WWE" (imagine WWE Superstars and Divas at their favorite summer camp as kids, which happens to be run by *Vince McMahon*). Other originals include "Diva Search," a competition series for the next WWE Diva (fall), and "Unfiltered: With *Renee Young*," a short-form interview series featuring WWE stars and celebs (May). "It's easier... to attract talent now," CEO McMahon said in a conference call Mon. "We were first in on this platform basically, and with that comes a cache of being very close, knowing what we're doing with social media, digital... We're way ahead of the curve, and we're going to stay ahead of the curve." Over a period of time, WWE expects to get its OTT network at 3-4mln subs (no timeframe yet). How does it get to that number? "There's about 311mln broadband homes in our top 16 markets. About half of them have a person in the home with some affinity to WWE, so it's about 150mln. Of that 150, about 100mln have an active fan. So that 100mln is what we see as the total available market," Barrios explained, with WWE seeing its potential at 3-4% of that market.



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**Walking Dead, March Madness & Other Ratings:** Sun night's action-packed, 90-min Season 5 finale of **AMC's** "The Walking Dead" was the highest-rated finale in series history, bagging 15.8mln viewers and 10.4mln 18-49. Live companion show "Talking Dead," which aired right after, scored its highest-rated ep in series history, drawing 7.5mln viewers and 4.9mln 18-49. When including sports and specials, all 16 eps of "The Walking Dead" Season 5 rank in the top 50 telecasts across all of television among 18-49, the first time a series has achieved this in cable history. -- The 2015 **NCAA** Men's basketball championship is delivering the highest-average overnight rating in 25 years (since the current TV format began in 1991). That's great news for **TBS, CBS, TNT** and **truTV**. Through the Elite Eight, the NCAA Tournament is averaging a 7.2/15 overnight rating/share, up 11% through the same period last year, based on Nielsen metered market ratings. Overall, Elite Eight coverage on TBS and CBS has averaged an 8.0/16, up 23% over last year. -- **Nat Geo's** Sun night premiere of "Killing Jesus" drew 3.7mln P2+ to the 3-hour special, the highest total viewership in the net's history. For the premiere airing at 8pm, the film scored a 2.8HH rating, the 2nd highest HH in network history. The program also premiered Sun night on **Nat Geo MUNDO** in the US and will air in 171 countries in 45 languages.

**Retrans Watch:** **Media General** is warning **Suddenlink** subs that the MSO's contract to carry stations, including **CBS** affil **KLFY** (Lafayette, LA) and **WNCT** (CBS affil out of Greenville, NC) expires on Apr 7. Suddenlink said it's working on a new agreement and that there is "plenty of time" to reach a new deal. "Importantly, we want to keep Media General's TV stations on your lineup and we've already agreed to pay them more than we're paying today," the operator said on its website.

**AT&T U-verse Expansion:** As part of **AT&T U-verse's** continuing expansion of its GigaPower service, the telco launched the offering in parts of Cupertino, CA. With speeds up to 1 Gbps, the service also features advanced TV options including recording and storing up to 900 hours of SD or 330 hours of HD programming.

**Propagate Content:** Former **Nat Geo Channels** pres *Howard Owens* launched **Propagate Content**, an indie premium content venture that will create, develop, produce and distribute programming for cable, broadcast and digital audiences. **A+E Networks** is an equity investor, and former **A&E** gm *David McKillop* serves as partner and chief creative officer.

**Bravo/Esquire/Oxygen Upfront:** In a first for both nets, **Oxygen** and **Esquire** will air a companion co-production series that follows a group of male comedians based in L.A. But here's the twist: On Esquire the series is dubbed "Comedians of LA" and will focus a comedian's work life, while on Oxygen "Living with Funny" will recount characters' personal lives and relationships. They'll air concurrently, so you'll need to watch both to get the complete picture. It was 1 of a flurry of announcements from the nets' upfront in NYC Mon. Oxygen's recent rebrand caters to multicultural, millennial females, said NBCU Cable Ent Lifestyle Networks pres *Frances Berwick*. "We have a whole new slate of shows that speak to this hard-to-reach, multicultural generation—concepts that highlight a bold, unapologetic, community-oriented mindset," she told the crowd. New series "Douglas Family Gold," "The Hustle," "Pretty Strong," "Player Gets Played," "Boss Nails" and the 3rd installment "Preachers of Atlanta" fall under the new direction. On the heels of **Bravo's** first scripted series "Girlfriends Guide to Divorce," Berwick announced the net has greenlit a second with "Odd Mom Out," a half-hour comedy premiering Mon, June 8, 10pm. "Bravolebrities" *NeNe Leakes* and *Kim Zolciak Biermann* announced their new spinoff "NeNe and Kim: The Road to Riches" (wt) as part of the network's slate of 10 new and 4 returning series. Other new shows include "Après Ski," "Fit Club," "My Fab 40th," "Mother Funders," "Tour Group" and "Recipe for Deception." Meanwhile, 18-month-old Esquire saw a 20% lift in the A18-49 demo and 11% in M18-49 in 4Q, Berwick said. "And that tremendous momentum has continued through 1Q—we're up 55% with adults and 42% among 18-49 men, powered by original hit series 'Friday Night Tykes.'" At the event, attendees got a brief stand-up set from comedian *Brandon T. Jackson*, who has signed on for the Oxygen/Esquire co-production; a performance from "The Prancing Elites," stars of the upcoming Oxygen show about an African American, gay and non-gender conforming dance team; and 4 sommeliers were on hand from the upcoming Esquire series "SOMM" (wt).

**TiVo Teams with Clypd:** **TiVo Research and Analytics** is teaming with programmatic sales platform firm **clypd** to incorporate TiVo's data products into clypd's offerings. **Clypd** will provide buyers and sellers of TV inventory with targeting data and performance metrics integrated with TiVo Research's data products, including the True Target Indices. Users of TiVo Research data can go directly from analytics to targeted investment in television against their optimal desired audience.

**Programming:** **Comedy Central** made headlines Mon by announcing that stand-up comedian *Trevor Noah* will be the next host of "The Daily Show." He joined the show last year as a contributor. -- **ABC** picked up its 1st saga-to-series "Shad-



# BUSINESS & FINANCE

owhunters,” based on the *NY Times* bestselling young adult book series *The Mortal Instruments*.

**People:** *Anne Sweeney*, former **Disney Media Networks** co-chair and **Disney-ABC Television** pres, has joined **Netflix’s** board. Also new to the streaming service’s board is **Microsoft** gen counsel *Brad Smith*.

Their additions bring the total number of directors to 9. -- **Travel Channel** promoted *Brian Leonard* to vp, programming and development.

-- **Comcast** announced a slew of promotions—21 in all. Among them is *Charlie Herrin*, who was upped to evp, customer experience; *Matt Strauss* as evp, gm video services and *Sherita Ceasar* to svp, national video deployment engineering. -- **NBCU’s** Hispanic Enterprises and Content tapped *Reny Diaz* as vp, insights and strategy, reporting to CMO *Jacqueline Hernandez*. Previously, Diaz was Research Director at **Fusion** and **Univisión Noticias**.

**CTHRA Awards:** **CTHRA** seeks noms for its 2015 Excellence in HR Awards program (through May 15), which honors HR professionals in cable and satellite. **Cablefax** is the media partner for the awards, which include Team Innovator of the Year for innovative problem solving skills. Award recipients will be honored during CTHRA’s Annual Symposium in Oct in Philadelphia. The 2015 honorees also will be featured in CTHRA’s HR Pulse member newsletter.

## Cablefax Daily Stockwatch

Company	03/30 Close	1-Day Ch	Company	03/30 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
DIRECTV:	85.81	0.49	COMMSCOPE:	26.40	0.13
DISH:	70.78	0.15	CONCURRENT:	6.47	0.15
ENTRAVISION:	6.45	0.02	CONVERGYS:	22.86	0.41
GRAY TELEVISION:	13.90	0.48	CSG SYSTEMS:	30.19	0.25
MEDIA GENERAL:	16.79	0.16	ECHOSTAR:	51.88	0.67
NEXSTAR:	58.04	1.04	GOOGLE:	552.03	3.69
SINCLAIR:	32.35	1.24	HARMONIC:	7.39	0.10
<b>MSOS</b>					
CABLEVISION:	18.48	0.40	INTEL:	31.46	(0.54)
CHARTER:	183.39	3.39	INTERACTIVE CORP:	67.00	(0.45)
COMCAST:	56.61	0.67	JDSU:	13.14	0.16
COMCAST SPCL:	56.24	0.58	LEVEL 3:	54.47	0.52
GCI:	15.71	0.23	MICROSOFT:	40.96	(0.01)
GRAHAM HOLDING:	1040.00	(3)	NETFLIX:	422.57	7.80
LIBERTY BROADBAND:	53.70	(0.27)	NIELSEN:	44.79	1.46
LIBERTY GLOBAL:	51.69	0.17	RENTRAK:	56.76	1.34
SHAW COMM:	22.56	(0.06)	SEACHANGE:	7.80	(0.03)
SHENTEL:	31.83	0.10	SONY:	27.09	0.31
SHENTEL:	31.83	0.10	SPRINT NEXTEL:	4.75	0.03
TIME WARNER CABLE:	149.27	2.74	TIVO:	10.66	0.19
<b>PROGRAMMING</b>					
21ST CENTURY FOX:	34.26	0.56	UNIVERSAL ELEC:	56.81	0.57
AMC NETWORKS:	76.52	1.83	VONAGE:	4.93	(0.05)
CBS:	61.87	0.66	YAHOO:	44.95	(0.15)
CROWN:	4.22	(0.11)	<b>TELCOS</b>		
DISCOVERY:	31.09	(0.18)	AT&T:	32.97	0.22
DISNEY:	106.12	0.64	CENTURYLINK:	34.06	(0.04)
GRUPO TELEVISIA:	33.46	0.36	TDS:	25.14	0.17
HSN:	68.82	1.29	VERIZON:	49.12	0.56
LIONSGATE:	33.26	(0.29)	<b>MARKET INDICES</b>		
MSG:	84.44	3.71	DOW:	17976.31	263.65
SCRIPPS INT:	69.62	0.72	NASDAQ:	4947.44	56.22
STARZ:	33.99	0.24	S&P 500:	2086.24	25.22
TIME WARNER:	85.30	0.19			
VIACOM:	68.44	0.19			
WWE:	14.09	(2.43)			
<b>TECHNOLOGY</b>					
ADVANTAGE:	2.37	(0.01)			
AMDOCS:	54.77	0.69			
AMPHENOL:	58.77	1.13			
AOL:	39.43	(0.01)			
APPLE:	126.37	3.12			
ARRIS GROUP:	29.08	0.75			
AVID TECH:	14.66	(0.07)			
BLNDER TONGUE:	1.72	(0.01)			
BROADCOM:	44.12	1.21			
CISCO:	27.65	0.52			

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## CFX TECH by Joyce Wang

### WiFi Marching Forward

WiFi got a lot of love from the **FCC** and on the Hill last week. Earlier in the week, House members were bullish on unlicensed spectrum during a Communications subcommittee hearing, after which House members from both parties introduced legislation to incentivize the federal agency to sell some spectrum for commercial use.

Then on Fri, the FCC said it will consider action aimed at using spectrum sharing technologies to make 150 MHz spectrum in the 3.5 GHz band for wireless use. Last year, the FCC added 100 MHz of spectrum for WiFi in the lower 5 GHz band and is seeking to secure some unlicensed spectrum in the 600 MHz band (TV White Space band) as part of its upcoming incentive auction. Another prime candidate to help meet the demand for WiFi is the upper 5 GHz band, currently used by the auto industry. "We agree that the upper 5 [GHz band] can be used if done right. We also believe that the auto manufacturers testing in this space can be protected, and need to be protected," Republican commish *Michael O'Rielly* said during an event hosted by **WiFi-Forward** on Wed, which is backed by companies and groups including **NCTA, Comcast, Time Warner Cable, Charter** and **Arris**. "We'd love for them [auto industry] to move forward on some of their technologies. We've seen great use of the 5 GHz band by the WiFi community, and we think we can do sharing here as well without causing technical interference," O'Rielly said. The upper 5GHz band was originally allocated to improve roadway safety. Unlicensed services generally share spectrum with other wireless services on a non-interference basis. That touches on a petition filed last year by hotel chains including Marriott. They want the FCC to amend or clarify the rules that cover interference for unlicensed spectrum, hoping to gain the right to block outside WiFi access. "The hotel industry came to us last year and out of concern for the security of their customers asked to block outside access. It seems to me that there are legitimate security concerns, but unilaterally

blocking WiFi hotspots seems like a terrible idea..." Democratic commish *Jessica Rosenworcel* said during the WiFiForward event. The hotels have already withdrawn the petition. O'Rielly said he isn't much of a believer of the security argument of the hotel industry. The truth is whether hotels enable WiFi has become an determining factor when people choose hotels, he said. Also at the event was chip maker **Broadcom's** evp, worldwide sales *Michael Hurlston*. Calling the 5 GHz band vital for "sustenance and growth of WiFi," he said it's critical that additional bands be made available in this band. Similarly, enabling unlicensed activity in the TV White Space bands is vital to technologies such as 802.11af. Known as the Super-WiFi, the 802.11af specification can improve coverage by 3-4 times over transmission on the 2.4 GHz band, Hurlston noted. "We can use this attribute for remote access among other things," he said.

**Arris Goes Racing:** Arris scored a deal with **NASCAR Productions** to provide Internet access at NASCAR Sprint Cup series events this season. The vendor's DOCSIS 3.0 Cable Modem SURFBoard SB6183 and E6000 Converged Edge Router will be the hub for delivering all services to the modems. In addition, the ARRIS Global Services team will be on-site at every NASCAR Sprint Cup Series race, offering integration and support throughout the racing season.

**NAB Tackles Online Video:** With the rapid expansion of streaming video, broadcasters are looking to share the OTT pie with cable. This year's **NAB Show** will feature a new Online Video Conference exploring topics such as OTT monetization, mobile video, cross-screen delivery and TVE. *Alison Moore*, head of **NBCU's** TVE initiative, will be the keynote speaker and kick off the conference on April 14.

Got tech news? Reach out to Cablefax Tech editor *Joyce Wang* at [jwang@accessintel.com](mailto:jwang@accessintel.com)

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