

Cablefax Daily™

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What the Industry Reads First

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TV Innovation Summit: Content Searches for Its Rightful Ruler

Sorry, *Sumner Redstone*. Content isn't king any more, according to **Wells Fargo Securities'** *Marci Ryvicker*. "I can live my day just fine without 'CSI.' I can't live my day without my Xfinity broadband," the analyst said at **Cablefax's** annual TV Innovation Summit. And so that set the tone for a conference exploring the new TV ecosystem. Whatever the new landscape is, consolidation will be a part of it. Today, the top 5 pay TV companies own about 85% of the pay TV market. When/if the pending transactions close, the top 5 companies will own about 96% of the market, Ryvicker said. If you're worrying about which MVPD is next, maybe you can stop. "I imagine that we're in an M&A pause for a while. I don't think we're going to get another deal anytime soon," Ryvicker said, though she added that at some point **Altice** will probably return to the negotiating table. Plus, she thinks **Charter** may not be done. As for Charter's pending **Comcast-Time Warner Cable-Bright House** transactions, she noted that the management team already has offered a lot of voluntary concessions and promises. "Have they given up too much," she asked, noting that **FCC** chmn *Tom Wheeler* is known for extracting things at the last minute. "The latest thinking on Wall St is that instead of a 3-year consent decree, the FCC is going to ask for a 7-10 year consent decree." Other predictions from the analyst: the video content bundle isn't breaking with it just too expensive to get all the channels consumers most want from multiple providers. That doesn't mean there isn't a place for OTT offerings. For example, **Olympusat** CEO *Tom Mohler* said that major operators cumulatively reject over 5mln Hispanic applicants each year due to credit. "We know OTT will be a great application," he said. Similarly, **Sling TV** CEO *Roger Lynch* talked about how **DISH's** offering appeals to millennials who are the cord-nevers of society. But it's also appealing to cord-cutters, which he said are generally in their 40-50s. "Our reach is really going after the market for who the big bundle doesn't make sense," Lynch said. **Sony Playstation VUE** vp *Dwayne Benefield* said VUE viewers are averaging watching 20 channels a month. TVE still isn't the smooth process the industry wants it to be. "A lot of people don't realize you can authenticate your pay TV subscription on **Hulu** and get early access to programming," said *Jim Galley*, Hulu's dir of distribution and strategic partnerships. And Hulu can't really market it because the TVE experience varies so drastically between MVPDs. Some have complained that authentication is the TVE stumbling block, but **A+E Nets** svp, digital media *Evan Silverman* called it a "red herring,"

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with content the real issue. "If [users] see a rich library of content, then it's a great experience," he said. As for VOD, it's kind of like a box of chocolates, you never know what you're going to get in terms of windowing, said Comcast video strategy and analysis vp *Steve Meyer*. On the positive side, "my 82-year-old mother knows what On Demand is. I think that's an important trend to recognize," said **Canoe** head of biz dev *Chris Pizzurro*. Last year, Canoe did more than 6bln ad insertions on VOD. This year, it surpassed that number in July. Electronic Sell-Through is increasingly important for VOD, with **In Demand** movies & original programming svp *Emilio Nunez* revealing that **Cox** will probably be the next large MVPD to roll it out. Comcast and **Verizon** both currently offer EST. While TV continues to change, some things stay the same. "Primetime is still the time when most people are watching television. What's racially changed is the ways customers are managing to get to that TV," Meyer said.

Retrans Update: **TEGNA** and **DISH** agreed to an 8-day contract extension through Oct 9 at 7pm EST as talks continue on a new pact. "With Hurricane Joaquin forecast to potentially impact several TEGNA markets, this extension ensures that critical programming remains available to all viewers," TEGNA said in a statement Thurs. Like most of retrans fights, rate is the issue. The TEGNA/DISH negotiation is just 1 of 3 contract deadlines that originally were set to expire late Wed. **Tribune Media** and **AT&T U-verse** reached a 24-hour extension Thurs morning. **DirectTV** and **Media General** inked a deal Thurs to avoid a blackout of 62 TV stations in more than 40 markets. "This fair resolution ensures that we can continue to provide top quality news, sports, entertainment, and other local programming that is most important to you," according to an announcement that Media General posted on its station websites.

Verizon/Outdoor: In a statement on dropping **Outdoor Channel** from the FiOS TV lineup at midnight Thurs, **Verizon** said "from time to time, we make the hard decision to remove channels that most of our customers rarely watch, particularly where suitable alternatives exist. As a result, Verizon will not be renewing our contract with Outdoor Channel." The move followed the telco's decision to drop sister net Sportsman Channel a month ago. **Outdoor Sportsman Group** points to 130mln Americas who it says are engaged in some form of outdoor lifestyle activity.

Alice's Financing Moves: **Altice** continues to work on financing its **Cablevision** acquisition. According to a release Thurs, Altice raised \$8.6bln in new debt, including a \$3.7bln 7-year senior secured term loan; \$1 billion of 10-year senior guaranteed notes and \$3.8 billion of 7-year and 10-year senior unsecured notes. Application will be made to list the Placing Shares on Euronext Amsterdam. Settlement is expected to take place on Oct 5, at which date the Placing Shares are expected to be admitted to trading on Euronext Amsterdam

Court Dates: Dec 3 is the date for oral arguments at the DC Circuit on broadcasters' challenge of the **FCC's** joint sales agreement rules. The next day, the same court hears arguments on the net neutrality case.

go90 Goes Live: **Verizon's** mobile streaming service go90 finally went live Thurs. The free, ad-supported app offers a mix of short-form digital content in addition to TV shows and live events covering sports and concerts. At launch, there are more than 8,000 titles available as well as over 35 exclusive original series, which Verizon said it plans to double by year-end.

Retrans Rules: Led by Reps *GK Butterfield* (D-NC) and *Bobby Rush* (D-IL), 6 members of the Congressional Black Caucus urged **FCC** chmn *Tom Wheeler* to keep the exclusivity and network non-duplication rules. In a letter to Wheeler Wed, the lawmakers said the rules were adopted to support local broadcast TV, among other things. Exclusive programming rights can incentivize networks, syndicators and local stations to invest in more and better video programming, they said. Wheeler has circulated a proposal to eliminate the exclusivity rules, which groups like **NAB** strongly oppose.

Android TV Beefs up Content: The Android TV platform now offers access to standalone streaming services such as **HBO Now**, **Showtime**, and **CBS All Access**, **Google** said in a blog post Thurs. The company also announced its partnership with **Disney** to offer Disney Movies Anywhere digital storefront on Android TV as well as **Epix**, **WWE Network** and **UFC's** streaming service. In addition, Google added new smart TV partners, enabling device makers including Hisense and TLC to offer Android TV.

Now Streaming: **CuriosityStream**, the service launched by **Discovery Comm** founder *John Hendricks*, premiered 4 new programs on the science behind planned missions to Mars in anticipation of the film "The Martian." They include 5-part series "Destination Mars," investigating the perils and promise of a manned mission, and "Cosmic

BUSINESS & FINANCE

Front: Terraforming Mars,” a special that looks how the planet could be transformed into flowing rivers and forests in less than a century.

People: *Jennifer Sarlin* joined **TLC** as svp of marketing starting Thurs. She will report to *Nancy Daniels*, evp /gm. Sarlin has more than 20 years in the TV industry and has worked on brands including **Bravo**, **Oxygen**, **Discovery**, **Animal Planet** and **Travel Channel**. -- **AMC** and **SundanceTV** announced promotions and hires to their programming teams. *Susie Fitzgerald*, most recently svp of scripted development and current programming for **AMC**, was upped to evp of scripted programming for both **AMC** and **SundanceTV**. *Christian Vesper*, most recently svp of scripted development and current programming for **SundanceTV**, has been named svp of international programming, development, acquisitions and co-productions for the net. *Kristin Jones*, who was brought on in 2014 by **AMC** as a consultant focused on international scripted projects, has officially joined the net as svp of international programming, development, acquisitions and co-productions. In addition, *Kristi Felton* joined **AMC** as vp of scripted programming. Fitzgerald, Vesper and Jones all report into *Joel Stillerman*, pres of original programming and development for **AMC** and **SundanceTV**, while Felton reports into Fitzgerald.

Cablefax Daily Stockwatch

Company	10/01 Close	1-Day Ch	Company	10/01 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
DISH:	58.80	0.46	CONVERGYS:	23.00	(0.11)
ENTRAVISION:	6.69	0.05	CSG SYSTEMS:	31.10	0.30
GRAY TELEVISION:	12.75	(0.01)	ECHOSTAR:	43.83	0.80
MEDIA GENERAL:	13.90	(0.09)	GOOGLE:	611.29	2.87
NEXSTAR:	46.53	(0.82)	HARMONIC:	5.75	(0.05)
SINCLAIR:	25.56	0.24	INTEL:	30.00	(0.14)
TEGNA:	22.61	0.22	INTERACTIVE CORP:	65.22	(0.05)
MSOS					
CABLE ONE:	428.36	8.94	LEVEL 3:	43.00	(0.69)
CABLEVISION:	32.81	0.34	MICROSOFT:	44.61	0.35
CHARTER:	181.77	5.92	NETFLIX:	105.98	2.72
COMCAST:	57.41	0.53	NIELSEN:	44.90	0.43
COMCAST SPCL:	57.72	0.48	RENTRAK:	57.88	3.81
GCI:	16.52	(0.74)	SEACHANGE:	6.18	(0.12)
LIBERTY BROADBAND:	53.50	2.06	SEACHANGE:	6.18	(0.12)
LIBERTY GLOBAL:	43.96	1.02	SONY:	24.72	0.22
SHAW COMM:	19.28	(0.12)	SPRINT NEXTEL:	4.05	0.21
SHENTEL:	41.31	(1.5)	TIVO:	8.48	(0.18)
TIME WARNER CABLE:	181.85	2.48	UNIVERSAL ELEC:	41.17	(0.86)
PROGRAMMING					
21ST CENTURY FOX:	27.20	0.22	VONAGE:	5.82	(0.06)
AMC NETWORKS:	72.83	(0.34)	YAHOO:	28.91	UNCH
CBS:	39.47	(0.43)	TELCOS		
CROWN:	5.10	(0.25)	AT&T:	32.53	(0.05)
DISCOVERY:	25.36	(0.67)	CENTURYLINK:	24.60	(0.52)
DISNEY:	102.67	0.47	FRONTIER:	4.72	(0.03)
GRUPO TELEVISIA:	25.82	(0.2)	TDS:	25.08	0.12
HSN:	56.66	(0.58)	VERIZON:	42.96	(0.55)
LIONSGATE:	37.67	0.87	MARKET INDICES		
MSG:	159.49	8.49	DOW:	16272.01	(12.69)
SCRIPPS INT:	48.42	(0.77)	NASDAQ:	4627.08	6.92
STARZ:	36.68	(0.66)	S&P 500:	1923.82	3.79
TIME WARNER:	69.34	0.59			
VIACOM:	44.03	(0.24)			
WWE:	17.18	0.28			
TECHNOLOGY					
ADDVANTAGE:	2.28	0.04			
AMDOCS:	56.55	(0.33)			
AMPHENOL:	50.03	(0.93)			
APPLE:	109.58	(0.72)			
ARRIS GROUP:	26.03	0.06			
AVID TECH:	7.80	(0.16)			
BLNDER TONGUE:	0.65	0.00			
BROADCOM:	51.01	(0.42)			
CISCO:	25.73	(0.52)			
COMMSCOPE:	25.35	0.05			
CONCURRENT:	4.70	(0.02)			

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PROGRAMMER'S PAGE

Cruisin' and Boozin'

Actor/adventurer *Jack Maxwell* has been prepping—unknowingly—for his role as host of **Travel Channel's** "Booze Traveler" since childhood. He used to shine shoes in the pubs of South Boston, where he discovered this truism: "Alcohol has a magical socializing effect." Its power would transport them to other times, and the stories would flow. That's basically what happens in the show, whose season 2 premiered Mon 9/28 and now airs Tues at 10pm. Maxwell's got a tough gig: He travels to a culture to learn about its history and traditions through its libations. But the show's focus is not about getting boozed up, despite the name. "It's not about excess at all, it's about celebration," he says. There were very few times when he had too much to drink, in fact. Nor is it a typical travel show. "It's not about seeing buildings and structures and all that. We want to live as the people do. You can go online and learn about a place. [Here] it's about talking to the locals... It's the world in a glass." So, what's new for round 2? "I go in with a much broader perspective," he says. "I realized we're very similar," in that we drink to socialize, celebrate, mourn and frankly to take the edge off. Also new this season: Sometimes it's about the crazy. In Hong Kong he was asked to hold a poisonous cobra, which he did despite being terrified. In Tanzania he found himself drinking cows' blood with Maasai warriors. Sipping the most expensive whisky on earth in Scotland was more delight than crazy—save the price tag: \$640,000 U.S. dollars for a 6-litre decanter. If you want more of Maxwell, Travel has a web series spinoff called "Jack With Spirits" where he visits top craft distilleries in the U.S. The segments are shorter-form so it's "more about the drink and the process," he says. "But it's still about the people," he says. — *Kaylee Hultgren*

Reviews: "Billy on the Street," premiere, Thursday, 10:30pm, **TruTV**. A trainwreck of a series, with talented comic madman *Billy Eichner* running on the streets of Manhattan asking people strange pop-culture questions. Somehow he gets *Tina Fey* to run too as he tries to find her a non-Hollywood friend. You must be in the mood for this low-budget romp, but it could catch fire, thanks to Eichner's fast-paced improv talent. -- "Prison Kids: A Crime Against America's Children," Sunday, 8pm, **Fusion**. The U.S.A. locks up more children than any other developed country by far, hip-hop magnate *Russell Simmons* says as this doc opens. The numbers are powerful: 54mln kids are incarcerated, costing taxpayers \$8bln/year; 70% of the kids suffer from mental issues; and 33 states lack a minimum age to charge kids with a crime. The dangers of locking up kids, sometimes in solitary confinement, are explored with depth and historical context. The doc is powerful advocacy and so lacks an alternate viewpoint. -- "The Weapon Hunter," premiere, Monday, 8pm, **Smithsonian**. The opening ep is a fascinating peek inside the world of tank collectors. Knowledgeable host *Paul Shull* traverses N. America seeking parts for a WWII Sherman M10. -- "The Benders," Thursday, 10pm, **IFC**. Interesting choice for IFC to go with a guys' comedy, but the hockey-based series has its moments. — *Seth Arenstein*

Basic Cable Rankings (9/21/15-9/27/15)			
Mon-Sun Prime			
1	ESPN	1.3	3103
2	DSNY	0.7	1763
2	FOXN	0.7	1750
4	USA	0.6	1570
5	HGTV	0.5	1226
5	HIST	0.5	1179
5	TBSC	0.5	1174
5	DSE	0.5	117
9	ADSM	0.4	1066
9	FX	0.4	1063
9	AMC	0.4	981
9	FOOD	0.4	936
9	DISC	0.4	902
9	TNT	0.4	874
9	ID	0.4	818
9	OWN	0.4	758
17	LIFE	0.3	834
17	NAN	0.3	821
17	SYFY	0.3	797
17	CNN	0.3	775
17	MSNB	0.3	697
17	HALL	0.3	669
17	A&E	0.3	657
17	TLC	0.3	638
17	VH1	0.3	612
17	FAM	0.3	599
17	NFLN	0.3	584
17	DSJR	0.3	541
29	SPK	0.2	588
29	BRAV	0.2	577
29	ESP2	0.2	560
29	APL	0.2	542
29	CMDY	0.2	500
29	TVLD	0.2	484
29	EN	0.2	436
29	NGC	0.2	422
29	WETV	0.2	420
29	TRU	0.2	419
29	MTV	0.2	412
29	INSP	0.2	395
29	GSN	0.2	384
29	TRAV	0.2	362
29	HMM	0.2	359
29	LMN	0.2	358

*Nielsen data, supplied by ABC/Disney, is based on coverage area of individual networks

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