

# Cablefax Daily™

Wednesday — November 25, 2015

What the Industry Reads First

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## Black Friday: From Goodie Bags to Cheap Movies, MVPDs Have It Covered

Good news for video and broadband providers as we head into the most-hyped shopping day of the year: consumer expectations about tech spending increased 8.8% from Oct to a 92.1 score in Nov, according to the **Consumer Technology Assn's** (formerly **CEA**) Index of Consumer Technology Expectations. While consumer sentiment traditionally moves higher ahead of Black Friday, this is a larger boost than has been historically seen this time of year, CTA said. Some 91mln Americans plan to purchase tech or tech accessories during Black Friday Week (the Mon before Thanksgiving through Cyber Monday), with video game consoles in the top spot (up from 5th last year). That's interesting given that we're a few years from the latest iteration of consoles—a sign that lower price points are helping consumers catch up to the technology. Also interesting given that **Sony's** Vue works on PS3 and PS4 (it launched on **Amazon** Fire TV earlier this month). TVs rank as the 2nd most expected tech purchase for the 2nd year in a row, followed by tablets (down from #1 the last 2 years). MVPDs have gotten wise to all this tech spending and are throwing up offers related to those new tablets and TVs. **Verizon FiOS** is waiving the \$80 set-up fee for customers who order online starting Wed through Dec 1. **Comcast** is bringing back its Electronic Sell-Through sale and trimming VOD rentals. From Nov 26-29, customers can snag dozens of titles for under \$7.99, including "Aloha." Its list of 99-cent rentals includes "The Age of Adaline" and "American Heist." **Time Warner Cable** is really getting into the spirit of the holidays with special events for Black Friday for shoppers at select TWC stores across the country. There will be raffles and talent appearances at some locations, with the first 50-100 customers receiving holiday gift bags with treats such as premium headphones and *Bobby Flay's* new cookbook, "Brunch @ Bobby's." There also will be **Hallmark Channel** Greeting Card Stations inside some stores for personalized, free greeting cards. **DirectTV** is advertising "The Ultimate Black Friday Event," which includes a free Genie upgrade, free premium channels for 3 months and **NFL** Sunday Ticket for 2015 and 2016 at no extra cost for some packages. Oh, and a \$200 Visa prepaid card in some instances. Plus, it's slashing promo deals to as low as \$19.99/month for 12 months with a 2-year contract (plus additional fees). There are plenty of deals on streaming devices—just peruse the Black Friday circulars. A few that caught our eye: Apple TV (3rd generation) \$59 at **Target**, Amazon Fire TV Stick \$25 (lots of stores, including **Best Buy** and **Kmart**), and a **Roku** Stream Stick with a \$10 **Hulu** credit for \$39.96 (**Sam's Club**).

**Hecht Leaves HLN:** Following a rebrand to focus on younger viewers and social media, **HLN** is changing things up yet again, this time driving its programming closer to **CNN's** and using library content that's been built over the last 3 years. As a result, *Albie Hecht* is stepping down as pres, with CNN evp *Ken Jautz* to replace him on an interim basis, chief *Jeff Zucker* wrote in a memo Tues. Zucker touted HLN, calling it the 2nd-fastest growing net in cable and heaping praise on a.m. news show "Morning Express." But he believes HLN's programming during daytime and overnight should be closer to CNN's, which has made a move to more docs in recent years. Zucker said Hecht has been instrumental in HLN's progress. "I am extremely proud of the transformation we have accomplished and I want

## A Tale of Rags and Riches.

From War-Torn Iran to Becoming the Biggest Winner in Poker History  
The Story of Antonio Esfandiari

POKEROGRAPHY

Sunday, Nov. 29th | 8pmET

poker  
CENTRAL

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to thank all of the talented people I've had the privilege of working with at HLN and especially thank Jeff and [Turner CEO] John Martin for all of their support," Hecht said in a statement.

**DOJ Probe:** The *WSJ* reported Tues that the **Dept of Justice** is investigating whether **Comcast** hinders competition in spot cable ad sales. Recall that competitors, including **Viamedia**, raised concerns that the now-scuttled **Comcast-Time Warner Cable** merger would hurt small spot cable buyers. **NCC Media**, which is owned by Comcast, Time Warner Cable and **Cox**, handles regional ad sales for those MSOs and others. DOJ is seeking additional info from companies in the market, including Comcast, the *WSJ* said, citing people familiar with the matter. Comcast said it plans to cooperate fully with the DOJ inquiry. "The American advertising market is robustly competitive, and advertisers have never had more choices to reach consumers. Local cable advertising competes with local broadcast TV, radio, newspapers, outdoor display, and the rapidly growing digital marketplace. All multichannel-video providers—or MVPDs—account for only about 7% of local advertising sales," said *Sena Fitzmaurice*, vp, govt communications. "To better compete with local advertising platforms with significant scale, like a broadcaster or web app that can sell an entire geographic market, and to provide more and better choices to advertisers, MVPDs have long worked together through local interconnect arrangements to sell local advertising. These interconnects increase efficiency and help keep costs down for advertisers and are responsive to the needs of major local advertisers. We believe these long-standing industry practices are good for advertisers and consumers, and we and other MVPDs are continuing to provide these important services to our clients."

**TiVo Earnings:** **TiVo** beat analyst expectations for 3Q revenue, posting net rev of \$132.3mln vs the Street's \$101.2mln consensus. But its 0.06 EPS was 2 cents shy of the analyst estimate. Adjusted EBITDA was \$29.3mln. TiVo added 418K subscribers through MSOs, up from 337K a year ago and 47% sequentially. It has more than 5.5mln MSO subscriptions for the traditional TiVo offering. "In North America, we had another strong quarter with MSO cable subscription net additions growing 44% year-over-year as we are now deploying the TiVo experience across more than 15 mid-sized operators. This is in addition to the seven out of the top-ten operators, such as **Charter, Time Warner Cable** and **Dish Network**, we serve through **DigitalSmiths**, which posted double-digit year-over-year revenue growth," CEO *Tom Rogers*, who is stepping down at the end of Jan, said in a statement. For 4Q, TiVo expects adjusted EBITDA excluding litigation expense and costs related to its CEO's transition to be in the range of \$25mln to \$28mln.

**FCC.com Redesign:** The seemingly never-ending quest to make the **FCC's** website more user-friendly continues. A redesigned FCC.gov is expected to launch Dec 10. The new site is responsively designed and improves interoperability with tablet and mobile device browsers, with the display optimizing based upon the device being used to view the site.

**Take a Piece of NFL Net:** The *NY Post* reports that the **NFL** is talking to nets about buying a stake in **NFL Net** as part of the bidding for its 16-game Thursday Night Football package. Analysts predict a long-term rights deal could go for \$600mln annual and potentially much higher, according to *The Hollywood Reporter*.

**Ratings:** **AMC's** "The Walking Dead" picked up some of the viewers it lost last week when it moved to the 10pm timeslot because of the premiere of "Into the Badlands." It averaged 13.2mln viewers Sun, up from 12.9mln the previous week (L+SD). Badlands was the 4th most-watched cable program of the week, even as its same-day audience fell to 4.8mln from the premiere's 6.4mln. TWD after show "Talking Dead" has seen slippage in same-day viewing with its move to 11pm



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# BUSINESS & FINANCE

for the first 3 eps of Badlands. This week's ep averaged 3.2mln, while previous eps were hitting more than 4mln viewers. Last week's Talking Dead ep saw a higher than usual lift in L+3, with total viewers increasing 33% (1mln viewers) compared to live+SD. The week's #2 most-watched program was **ESPN's** Houston-Cincinnati MNF game (12.2mln), followed by Thurs Night Football on **NFL Net** (6.6mln). The top-rated movie of the week was **Disney** original "Lion Guard: Return of the Roar," which average 4.1mln viewers. **Hallmark** was the 3rd highest-rated net in primetime last week (behind ESPN and **Fox News**), thanks to the momentum of its Christmas slate. On Sat, "Northpole: Open for Christmas" averaged a 3.0 HH rating and 3.5mln total viewers, making it the net's most-watched original movie premiere this year among women 25-54. Sun's "Merry Matrimony" delivered 4.4mln total viewers and is the most-watched original movie to-date among 25-54s.

**Programming:** **HBO** outlined some of the changes for "Sesame Street" when it launches on the premium net Jan 16. Not only will shows be trimmed to 30 mins, but it's introducing a new opening song along with an updated set and new cast member *Nina*, a bilingual Hispanic woman. Don't worry Sesame purists. We're told the song will still have the familiar melody and refrain of "how to get to Sesame Street." Other changes include Big Bird moving his nest to a tree.

## Cablefax Daily Stockwatch

Company	11/24 Close	1-Day Ch	Company	11/24 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>					
DISH:	62.96	(0.24)	CONVERGYS:	25.62	(0.02)
ENTRAVISION:	8.26	(0.11)	CSG SYSTEMS:	35.85	0.11
GRAY TELEVISION:	17.00	(0.39)	ECHOSTAR:	38.74	(0.13)
MEDIA GENERAL:	15.72	0.14	GOOGLE:	748.28	(7.7)
NEXSTAR:	58.91	(0.47)	HARMONIC:	5.45	(0.04)
SINCLAIR:	34.88	(0.15)	INTEL:	34.36	(0.12)
TEGNA:	28.10	(0.09)	INTERACTIVE CORP:	63.23	0.25
<b>MSOS</b>					
CABLE ONE:	449.78	(1.19)	LEVEL 3:	50.90	0.14
CABLEVISION:	30.49	(0.24)	MICROSOFT:	54.25	0.06
CHARTER:	186.11	(0.93)	NETFLIX:	123.31	(1.72)
COMCAST:	61.66	(0.47)	NIELSEN:	46.93	(0.33)
COMCAST SPCL:	61.78	(0.41)	RENTRAK:	47.96	(0.18)
GCI:	20.70	(0.02)	SEACHANGE:	6.34	(0.11)
LIBERTY BROADBAND:	52.61	(0.64)	SONY:	26.96	0.17
LIBERTY GLOBAL:	41.63	(0.77)	SPRINT NEXTEL:	3.83	0.04
SHAW COMM:	20.57	(0.04)	TIVO:	9.31	0.11
SHENTEL:	50.63	0.07	UNIVERSAL ELEC:	52.75	0.74
TIME WARNER CABLE:	183.77	(0.65)	VONAGE:	6.46	(0.22)
<b>PROGRAMMING</b>					
21ST CENTURY FOX:	29.85	(0.13)	YAHOO:	32.96	(0.4)
AMC NETWORKS:	81.80	0.35	<b>TELCOS</b>		
CBS:	50.54	(0.44)	AT&T:	33.39	(0.07)
CROWN:	5.85	0.04	CENTURYLINK:	27.23	(0.08)
DISCOVERY:	30.95	0.24	FRONTIER:	4.91	(0.05)
DISNEY:	117.95	(1.47)	TDS:	28.79	0.36
GRUPO TELEVISIA:	29.18	(0.12)	VERIZON:	45.20	0.21
HSN:	50.20	(0.4)	<b>MARKET INDICES</b>		
LIONSGATE:	34.43	(0.57)	DOW:	17812.19	19.51
MSG NETWORKS:	19.75	(0.18)	NASDAQ:	5102.81	0.33
SCRIPPS INT:	57.87	(0.6)	S&P 500:	2089.14	2.55
STARZ:	34.96	0.04			
TIME WARNER:	70.23	(0.29)			
VIACOM:	52.85	0.22			
WWE:	16.83	(0.39)			
<b>TECHNOLOGY</b>					
ADDVANTAGE:	2.29	0.07			
AMDOCS:	56.97	0.05			
AMPHENOL:	54.71	(0.67)			
APPLE:	118.88	1.13			
ARRIS GROUP:	30.48	(0.02)			
AVID TECH:	6.51	(0.07)			
BLNDER TONGUE:	0.37	(0.01)			
BROADCOM:	54.11	0.78			
CISCO:	27.27	(0.16)			
COMMSCOPE:	28.41	(0.55)			
CONCURRENT:	4.75	(0.01)			

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