

Cablefax Daily™

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What the Industry Reads First

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Driver's Seat: EPIX's Burkhart Discusses 'Danica' Doc, Direction Under MGM

Earlier this year, **MGM** completed its deal to take sole control of **EPIX** in a transaction that valued the premium net at \$1.28bln. Jill Burkhart, the net's senior director of original programming, sees the ownership change as an opportunity to reimagine content while also building on its strengths. EPIX's latest project, a doc on the life of **NASCAR** driver Danica Patrick produced by **ESPN's** Hannah Storm, continues EPIX's commitment to sharing inspirational athletes' stories.

How did "Danica" come about? [Storm] met [former EPIX CEO Mark Greenberg] on a plane, and he brought her in for a meeting with the original programming team. They loved her; she had some great ideas. We sort of had a running list of people that we'd love to do profiles of. Danica was one of them, and she had the right contacts to get in touch, and it was the right time for Danica. She's been approached in the past many times before, but I think she was finally at a point in her own life that she was like, "Yeah, it's the right time and I love the idea that another woman is going to tell this story, and she gets where I'm coming from." **Why have sports documentaries been a focal point for EPIX over the years?** For one thing, we're always looking for content that's going to rise above and make noise. We've done a lot of sports stuff, we've done the "NHL: Road to the Winter Classic," which did really, really well for us. The human side of these sports stories seems to be a great fit for us because we love character-driven stories. A lot of our social issue docs are also very character-driven and have a real human, relatable approach to them. What's interesting is that I'm not a terribly big sports fan, but I love these stories. That's what's so interesting and why they're a good fit for us because of those universal, easily accessible stories for men and women. **How is the programming strategy of a premium channel like EPIX different from an ad-supported network?** For one thing, we're not censored. Several years ago, we did a doc called "School: The Price of College Sports." That was basically an exposé of the **NCAA**. It likened all the college sports organizations to cartels, essentially. What appealed to us about that story was it's really a civil rights story about these kids who largely come from impoverished neighborhoods with the promise of, "you're going to make it big in the sport, we're going to pay for your sport," when in fact, those kids aren't really getting an education, they're not paid, somebody can take their image and put it in a video game without ever asking them. We just thought that is a story that needs to be told. If we were ad-supported, I think it would be a little more tricky to do uncomfortable topics.

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We can take chances, we can be riskier with our programming. **You mean because of conflicts with advertisers and sponsors?** Exactly. We can take risks that a regular cable network or network TV cannot really take. Also with things like “American Divided,” the doc series that we did last fall, we really tried to highlight the gaps in this country politically and where things are going. For us, it’s really about being riskier in our programming, being controversial without having to answer to anybody or worry about repercussions. **How do you seek to differentiate EPIX from Showtime, HBO, Starz, etc.?** We’re just eight years old and still building a brand, carving out an identity as a premium channel through our scripted programming. We’ve got three shows now, we’ve got a fourth in the works, and I think within the next year you’re going to see a lot more. One of the big things for MGM is really amping up scripted, but we’ll also be amping up unscripted. We’re still in a lot of conversations about what kind of unscripted that’ll be, but there’ll be a lot of doc series probably, and one-offs. With all programming, one of the biggest metrics for us is getting press attention for the programming that we do. That to us is a way of distinguishing ourselves and building our identity and our branding. ... We’ve been getting pitched some great stuff. We may get into the true crime space. It’s another area we’re looking at right now, but we just haven’t made any final decisions.

CBS Embraces Cord-Cutting: CBS chmn/CEO *Leslie Moonves* said Thursday that his company is actually benefiting economically from cord-cutting. During the company’s 3Q earnings call, he pointed out that CBS and **Showtime** have more subs than a year ago when taking virtual MVPDs and its direct-to-consumer offerings into account. He added that subs who switch from traditional pay-TV to digital packages are more profitable. “When a consumer switches from a traditional to a skinny bundle, we get double the fees. If they move to **CBS All Access**, that revenue sometimes tripled from what we get from traditional distributors,” Moonves said. He added advertising is also more lucrative in the OTT ecosystem. “Not only are we not affected as others are by cord cutting, it has real measurable upside for us,” Moonves said. “This is what sets CBS apart from the pack.” CBS saw quarterly revenue at its cable nets (**Showtime**, **CBS Sports Network** and **Smithsonian**) increase 40% YOY to \$840mIn, driven by PPV distribution of the Mayweather-McGregor fight, as well as the growth of its Showtime subscription service. In its entertainment division, the company cited growth from All Access since the premiere of “Star Trek: Discovery,” but didn’t offer details. While that show was expensive to produce, Moonves noted selling international rights to **Netflix** helped mitigate that expense. Overall, CBS’ 3Q revenue increased 3% YOY to \$3.17, but fell short of Wall Street’s estimate of \$3.26bIn, according to *Thomson Reuters*.

Roll with the Changes: **TiVo** is no longer a hardware company. That was pres/CEO *Thomas Carson*’s message to

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investors during the company's 3Q earnings call Thursday. "TiVo has moved well beyond a hardware company and is now an innovative entertainment technology company," he said. "To that point, 95% of our revenues this quarter came from software, services, advertising and licensing." As Carson alluded to, the company generated \$188mln in 3Q from licensing, services and software, compared to \$9.9mln from hardware. The company renewed a few key pieces of business during 3Q, including deals with **AT&T**, **Liberty Global** and **Sony**. AT&T is the company's most valuable customer, representing 14% of TiVo's quarterly business. Carson noted nine of the top 10 US pay-TV providers are TiVo customers, with **Comcast** being the exception. The two companies are embroiled in litigation, with TiVo alleging Comcast is infringing on several of its patents. "Bringing Comcast under license remains one of our top priorities," Carson said. "While we're pleased with the success we have had bringing the rest of the US pay-TV market under license, as we have cautioned before, litigation can be a long process." He added that he hopes the **International Trade Commission** will affirm key aspects of its initial decision in favor of TiVo on Thursday, "including the exclusion order barring Comcast from importing infringing products."

Beyond the Box: Arris CEO *Bruce McClelland* acknowledged that the company's set-top business is going to take a hit amid pay-TV sub losses, but said the company is "well positioned to benefit from the growth in over-the-top traffic." "While the pay TV business model evolves and direct-to-consumer distribution becomes a larger part of ecosystem, I expect the investment cycle related to the broadband network will accelerate and continue for years to come," he said. Arris pres of customer premises equipment *Larry Robinson* said the company is going to fall just short of its goal to ship 2mln DOCSIS 3.1 devices in 2017, but broadband sales were still up 10% YOY in 3Q and accounted for 40% of the company's business. Overall sales were down 5% YOY due to lower set-top volume. Arris pres of network, cloud and services *Dan Whalen* indicated the company is hopeful about deploying Full Duplex DOCSIS by the beginning of 2019, and that the technology will allow operators to "compete directly with fiber-to-the-home entry."

Yo Quiero: **Taco Bell** picked **Comcast Business Enterprise Solutions** to provide managed services like guest WiFi at more than 6,200 locations across the US. Comcast Business will provide the infrastructure needed to support technology initiatives, such as the Taco Bell mobile app and online ordering, while also granting each location 4G continuity.

Eye Sight: **Layer3 TV** added **CBS Sports Network** to its base Platinum allHD package, which the operator offers for \$75/month. The cable service is now available in the Denver, Chicago, DC, LA and Dallas markets.

Cable Center Hall of Fame: Congrats to the 21st class of **The Cable Center's** Cable Hall of Fame, who will be inducted during an April 4 gala in NYC. This year's honorees are **Advance/Newhouse's** *Nomi Bergman*, **Charter's** *John Bickham*, **NPR's** *Jarl Mohn*, **HBO's** *Richard Plepler* and **Comcast's** *Neil Smit*. Since 1998, 127 leaders have been inducted into the Hall. This marks the first year the induction has been held in the Big Apple. It will take place at the recently renovated Ziegfeld Ballroom, which will house the event through at least 2020.

Programming: **USA Network'** 1930's drama, "Damnation," premieres Tuesday at 10pm ET. The series will focus on the power struggle between a preacher breaking the status quo (*Killian Scott*) and a professional strikebreaker hired to stop him by any means necessary (*Logan Marshall-Green*). -- **Comedy Central** is celebrating the holiday season with a number of new comedy specials. "The Daily Show's The Yearly Show 2017," hosted by *Trevor Noah*, arrives on Dec 18 at 11pm ET. The "Drunk History Christmas Special" has creators *Derek Waters* and *Jeremy Konner* coming together to bring to life scenes like *George Washington* crossing the Delaware on Christmas and *Teddy Roosevelt's* ban on Christmas. "I Came Up with Christmas: A President Show Christmas" features creator *Anthony Atamanuik* as President *Trump* on Nov 30 at 10pm ET. -- **Sony-owned Crackle** acquired the rights to comedy feature "Federal Offense." The film stars *Chevy Chase* as a foul-mouthed grandfather who's been broken out of his nursing home.

People: **Univision** extended its employment agreement with pres/CEO *Randy Falco* for an additional two years. He'll stick with company until Jan 31, 2020 under the new deal. Under Falco, Univision has expanded its reach to an estimated 108mln average monthly unduplicated viewers while reaching record earnings. -- **NCTA** announced that, due to internal restructuring in response to the cancellation of its annual trade show, *Brian Dietz* has been promoted to svp for strategic communications. *Rob Stoddard* will become svp for industry & association affairs. Dietz will manage a department covering media relations, digital communications, brand management and digital grassroots activities for NCTA. Stoddard will guide a team centered on public affairs, member relation and NCTA meetings and special events. -- *Jill Dorthimer* is joining **Comedy Central** as vp, communications and head of primetime publicity. The former **AMC** exec will report to svp, communications *Steve Albani* as she guides the development and implementation of publicity campaigns for the net's primetime originals. -- ESPN named *Cary Meyers* svp, fan and media intelligence. He'll oversee all multimedia and consumer research functions for the brand and collaborate with senior leaders on content.