

# Cablefax Daily™

Monday — September 10, 2018

What the Industry Reads First

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## On Track: Altice Confident in Q1 Mobile Launch

While we may not yet have the pricing or device details for Altice's upcoming mobile offering, **Altice USA** CEO **Dexter Goei** is reaffirming that the service is on track to launch in 1Q2019. The company's MVNO with **Sprint** will set it above the pack, according to Goei, with one of the pros being that it gives them the "ability to fully control your customer experience." The focus isn't on phone features, but on the ability to constantly adapt what the customer wants to be able to do on their wireless handset. Beyond this, Goei believes that what will draw customers in and keep them subscribing will be the freedom that comes with not having to swap your SIM card should you want to switch providers. "If you are Comcast and Charter today, you have to swap the SIM card. That leads to a 30-40% churn of your customer base, in our experience," Goei said at an investor conference late Thursday. "We can onboard all four MNOs today onto our core network and never swap SIMs." Altice owns the SIM and has its own core network tethered to it, something Goei noted is not expensive and offers customers more flexibility. Some concern obviously remains over Altice's MVNO agreement with Sprint, however, with the former asking the **FCC** to deny or add conditions to the potential merger between Sprint and **T-Mobile**. Although the immediate launch wouldn't be affected, Altice expressed concerns over its ability to expand the service nationwide because there is no commitment between the two companies to honor existing MVNOs or offer partners the best wholesale terms and conditions for the full term of agreement or for 10 years post-consummation. Turning to the Altice One gateway, Goei said it is fully available to Optimum subs and accessible to half of the Suddenlink base. The company is continuing to move forward on its FTTH plans and is targeting to have a fiber-based all-in-one box on the market by the first half of 2019. While no mention was made of the lawsuit from members of the **Dolan** family over layoffs at Altice USA's **News 12**, Goei did applaud the Dolans for investing in data analysis in the video and advertising business. "We took that business and said we should be able to enhance the advertising CPM... both on a linear basis and also on a digital basis, and take that from a local market only to a national market as well," Goei said.

**A Win for Feds Over States:** The Eighth Circuit on Friday upheld a ruling that interconnected VoIP is an information service under the Telecom Act and thus regulation of **Charter's** VoIP services is preempted by federal law. **FCC Ajit**

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**Pai** said the ruling that federal policy trumps state in terms of information services is wholly consistent with the approach the agency has taken over the past two decades, including in last year's order overturning Title II regulation. Even the FCC's Title II rules under *Tom Wheeler* had federal preemption. Even so, states are attempting to strike out on their own—most recently California with its tough net neutrality bill, which has passed both chambers but hasn't been signed into law at this point. Washington's net neutrality bill was the first such law to take effect back in June. So far, no one has mounted a legal challenge to these state net neutrality laws, but it's expected... It's important to note that legal circles say that Friday's ruling only applies to those states inside the Eighth Circuit. As we wait for this issue to play out in the court, FCC leadership made it clear where they stand. "A patchwork quilt of 50 state laws harms investment and innovation in advanced communications services," **Pai** said in a statement. His Republican colleague *Mike O'Rielly* applauded the ruling, saying the FCC "needs to take [the] next step to affirmatively declare the same once and for all." The FCC has not actually defined classification for VoIP.

**Shell Settles In:** Some 20 minutes or so before speaking at the **Bank of America** investor conference on Thursday, *Jeff Shell* was named to the board of **Hulu**. "My knowledge of Hulu is that 'The Looming Tower' is really good and 'The Handmaid's Tale' is more of a struggle for me," the chairman of **Universal Filmed Entertainment Group** joked. "But there is no question that Hulu is a great business and a very valuable business. And it's important to us not just because of our equity ownership in it but because we sell a lot of our TV content to Hulu. And I talked about our animated TV content. We also have a deal with them to sell that as well along with some feature movies. So I think it's an important asset to us and I think it's also important customer to us. And I think we are excited once again to participate in the governance of it." **NBCU** owns a 30% take in Hulu, but had not held any board seats since 2011 when **Comcast** acquired it. **FCC** approval of the deal required that Comcast and NBCU have no influence over Hulu's operations, but that stipulation expired on Sept 1.

**TV Universe:** **Nielsen** puts its National Television Household Universe Estimate for the 2018-19 TV season at 119.9mIn, on par with the 119.6mIn estimate for the currently wrapping TV season. The number of 2+ viewers in US TV households is estimated at 305.4mIn—a 0.3% increase. Nielsen said the percentage of total US homes with televisions receiving traditional TV signals via broadcast, cable, DBS or telco, or via a broadband internet connection connected to a TV set is currently at 95.9%, down from 96.5% for the 2017-18 season. Nielsen uses US Census Bureau, combined with information from its national TV panel, to arrive at Advance TV Universe Estimates in early May. It then distributes final Universe Estimates before the start of each TV season.

**Podcast Crossover:** Plenty of traditional programmers made news at last week's **IAB** Podcast upfront as they look

## Cablefax:

### What's Happening in October

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#### » Most Influential Minorities Magazine

Cablefax's annual Most Influential Minorities magazine, celebrates the men and women who are shaping the industry and opening doors for minorities across all areas of business.

#### » Hispanic Heritage Month

This growing demo has a huge impact on every aspect of the industry. This series we'll explore upcoming trends in the Hispanic marketplace, examine the latest research and look at what networks and distributors are doing to cater to this powerful segment.

#### » CTHRA

Cablefax looks at the HR side of the business. What do the hiring trends and needs say about where cable is headed? Coverage will include HR organization CTHRA's annual Symposium and awards.

#### » Diversity Week

Cablefax will be on the ground in New York for all the Diversity Week happenings, including WICT's Leadership Conference, NAMIC's annual conference and The Walter Kaitz Annual Fundraising Dinner.

#### » SCTE Cable-Tec Expo

Daily coverage from the Expo show floor along with a preshow special report. We'll look at the technology and standards development that you need to know about right now. Our preshow will also highlight SCTE, WICT and Cablefax's Woman in Technology award winner.

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#### Events

**Cablefax &  
NAMIC Diversity  
Breakfast**  
October 16  
NYC

to boost efforts in the space. **Turner** announced its entire 60+ podcast portfolio, including **CNN's** "Anderson Cooper 360" and **Bleacher Report's** "Simms & Lefkoe Podcast," will be made available on **Spotify's** podcast platform. Turner is in the early stages of coordinating linear programming and podcasts, Turner Podcast Network vp, gm **Tyler Moody** told **Cablefax**. "[There's] podcasts to support TV shows and [we're] also exploring the idea of developing new IP and acquiring new shows that could perhaps be big in podcasts and make it to TV," he said. "We don't have any stories there yet, but it's one of the reasons to be in the space." Others include audience engagement, revenue and data collection. **Univision** is another TV player that participated in the upfront, unveiling several new podcasts, including Univision News' **Teresa Rodriguez's** "The Daughters of Juárez," a true story of serial murder south of the border. **Steve Mandala**, UCI ad sales and marketing pres, said Univision is now the top destination for Spanish-language podcasts. Other signs of video-podcast cross-over could be seen in **Midroll Media's** partnership with **OWN** to bring listeners the "Master Class" podcast, which follows last year's partnership to produce the "SuperSoul Conversations" podcast.

**People:** **Mediamorph** named former **Fox** exec **Thomas Stilling** as head of product. -- **Joseph Giraldi** was promoted to evp, digital media, **Smithsonian Networks**.

## Cablefax Dashboard

### Tweet Tweet



### Up Ahead

**September 12-14:** [Mobile World Congress Americas](#); LA

**September 14-18:** [IBC 2018](#); Amsterdam

**September 25-28:** [CableLabs Innovation Boot Camp](#); Louisville, Colorado

**October 15-16:** [WICT Leadership Conference](#); New York

**October 16-17:** [NAMIC Annual Conference](#); New York

**October 17:** [Kaitz Dinner](#); New York

### Research

- 44% of consumers watch at least five videos online each day.
- 56% of people spend most of their social media time on Facebook, while 18% prefer Instagram.
- 47% of people watch more videos on Facebook while 41% do so on YouTube. Only 8% watch the most on Instagram.
- 70% of people often visit the publisher's website after watching a video.

**(Source: 2018 PROMO Online Video Statistics and Trends)**

### Quotable

"Let me be clear about one important and foundational fact: Twitter does not use political ideology to make any decisions, whether related to ranking content on our service or how we enforce our rules. We believe strongly in being impartial, and we strive to enforce our rules impartially. We do not shadowban anyone based on political ideology. In fact, from a simple business perspective and to serve the public conversation, Twitter is incentivized to keep all voices on the platform."

- **Twitter CEO Jack Dorsey** in his testimony to the House Committee on Energy and Commerce

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