

# Cablefax Daily™

Wednesday — May 1, 2019

What the Industry Reads First

Volume 30 / No. 083

## Still Open: Charter In Talks To License X1 Platform

Charter has been in talks with **Comcast** not only about licensing the X1 platform, but the recently-launched Xfinity Flex streaming platform as well. “We’re down the road with our own user interface, but we have a good relationship with Comcast,” Charter CEO/chmn *Tom Rutledge* said on the company’s 1Q earnings call. To date, the two companies haven’t reached any sort of a deal. For now, Charter’s happy with the state of its UI as well as the ability to tweak it at its own pace. “We want to be able to continue to have that capability,” Rutledge said. “If we can check all the boxes in terms of having complete flexibility and low-cost, we could become a vendor of Comcast.” Rutledge didn’t give any details on how recently the two held talks. The openness to licensing X1 was a bit of a shock considering Charter’s heavy investments in its own cloud-based video guide. Those efforts date as far back as 2015, when **Arris** and Charter created a jv to purchase **ActiveVideo**, whose CloudTV platform powered Spectrum Guide. Comcast currently licenses X1 to **Cox Communications** as well as Canadian operators **Rogers Communications**, **Shaw Communications** and **Videotron**. The revelation came as Charter saw video sub losses of 145K while broadband subs rose by 428K. Rutledge made it clear that Charter isn’t backing away from video anytime soon, and there are still opportunities to win in the space. “We still believe video is an attractive product that we should sell and should be integral to our product and help drive our core relationships,” Rutledge said. “All the trends in video that have been going on continue to go on and the issues that are knocking video growth down are the price of the big bundle and the security of the big bundle... We continue to develop new video products and we’re trying to sell to the whole marketplace and be available as a video provider with a high quality integrated video service for all those customers that want to buy that service from us.” Charter expanded its video offering with the March introduction of Spectrum TV Essentials, an internet delivered OTT service available exclusively to Spectrum internet customers who don’t already subscribe to Spectrum video services. Rutledge said video is still a driver for Charter in terms of customer creation, and the losses in satellite could be Charter’s gain. “The macro trends are that video is on the decline and the question is how fast,” Rutledge added. “With satellite declining at the rate it is, there are opportunities for us to convert those customers into our customers while making them our broadband customers.” So far, it seems

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that Charter has been successful. “Charter’s overall video subscriber base is still shrinking, now at a rate of 1.7% YOY, but the result stands in sharp contrast to overall declines in industry traditional Pay TV subscribership that will easily exceed 4% in Q1,” **MoffettNathanson** said in a research note. “Cable is taking video share from satellite TV at an accelerating rate, softening its own rate of decline.”

**Say Cheese: Altice USA** scooped up streaming service **Cheddar** for \$200mln in an all-cash deal. The digital-first news company will join Altice’s news group made up of the **News 12** networks and **i24NEWS**. *Jon Steinberg*, Cheddar founder and current CEO, will join Altice to lead its news group. Steinberg has also said he’ll reinvest some of the proceeds from the deal into Altice stock. “Our goal is to make Altice News a leader in local, business, national, and international news everywhere as we look to build a live news offering for customers in the traditional pay TV ecosystem, as well as those looking to a la carte alternative SVOD services, vMVPDs, and free systems for their non-news entertainment,” Steinberg said in a statement. “The Altice team and Altice Way are as entrepreneurial as it gets with amazing markets, world-class local and international news, an amazing broadband network, and a soon to launch mobile offering. I can’t wait for Cheddar to begin working with Altice’s team.” Steinberg founded Cheddar in 2016 after serving as pres/COO of **Buzzfeed** for four years. Altice was an early investor in Cheddar, which is available in approximately 40 million pay tv homes through vMVPDs including **YouTube TV, Sling, Hulu Live, DirecTV Now**, free tv systems like **Pluto TV** and **Roku** and a campus network of 1,600 owned and operated screens on 600 campuses. The company recently expanded distribution after signing carriage agreements with **Comcast, Charter** and **Altice**. Cheddar plans to develop additional advertising products across the Altice footprint, mainly on its advanced Altice One and a4 advertising platform.

**Tweet Tweet: Twitter** is upping its streaming video game with a host of new and expanded content deals. The company announced its enhanced video strategy at its NewFronts in NYC Monday, its third time appearing at the series. Twitter and **Univision** struck a large content deal, with Twitter serving live coverage and highlights for the 2020 elections, soccer properties **Liga MX** and **UEFA Champions League**, Latin music awards shows and red carpets and must-see reality TV moments. **ESPN** and Twitter created “ESPN Onsite,” a brand extension of ESPN’s existing Twitter live shows when on location at major sporting events. The programming features live video and a mix of clips and fan engagement opportunities including polls and Twitter moments. **Viacom** will debut the “MTV VMA Stan Cam,” allowing fans to create a livestream on Twitter the way they want. **MTV** will ask fans to decide which audience member they want a reaction cam to focus on or follow backstage and behind-the-scenes during the VMAs. The

## Cablefax: What’s Happening... April & May

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		Awards	Events
<b>APRIL</b>	<p><b>NAB Show</b> Cablefax will preview and cover the hottest trends, panel discussions and show floor action at this massive annual gathering of the TV and broadcast industry.</p> <p><b>Customer Experience</b> In a crowded marketplace, smart providers know that to stand out they must create the ultimate customer experience. This report examines what’s working and what isn’t when it comes to both traditional distribution and direct-to-consumer offerings.</p> <p><b>CFX Leaders Retreat</b> Join us at this exclusive, off-the-record executive retreat designed to generate in-depth discussions on industry challenges and opportunities, leaving participants with actionable ideas to take back to the office.</p> <p><b>Cablefax: The Magazine – April Issue</b> <b>The Work Culture List *NEW*</b> Cablefax: The Magazine’s newest issue shines a spotlight on top employers who are making waves in areas such as veteran hiring, continuing education and diversity.</p>	<p><b>The FAXIES</b> Entry Deadline: April 12 Final Deadline: April 26</p>	<p><b>CFX Leaders Retreat</b> April 29-30</p>
<b>MAY</b>	<p><b>Cable Center Cable Hall of Fame &amp; WICT Signature Luncheon</b> Cablefax will provide the lowdown on this year’s honorees and all the details surrounding these annual must-attend events.</p> <p><b>The Year Was 1979...</b> It was a pivotal year for the industry that included the creation of WICT, ESPN, USA Network. Cablefax looks at what made this such a key year for the industry and how it has changed over the past four decades.</p> <p><b>The Gatekeepers</b> A series of Q&amp;As with MVPD programming and technology gatekeepers.</p>		

company will also bring back red carpet coverage for **BET**, **CMT** and **MTV** events. **Bleacher Report** will bring back “House of Highlights” after a successful first season, and **MLS** announced a multi-year extension of their content agreement that gives fans highlights, engagement opportunities and live matches in English through @UnivisionSports and @MLS. **MLS** will partner with Univision for live matches and post every goal on Twitter. **NFL** also extended its multi-year partnership.

**Hispanic Votes:** Univision officially launched its “2020 Vota Conmigo” (Vote With Me) campaign to register eligible potential voters ahead of the 2020 primary and general elections. Alongside the launch, the company revealed 2019 Hispanic voter turnout data across the country, with CA, FL, IL, NV, NJ, NY and TX demonstrating triple digit Hispanic growth. The data found that over half of new registered voters in California were Hispanic as were two in five new registered voters in Texas. Univision found that in crucial states, estimated Hispanic voter turnout doubled in 2018 vs 2014 (13mln vs 6.7mln) and voter turnout among Hispanic voters ages 18-24 jumped by an average of 170% in NV, NY, TX, IL, CA, NJ and FL. NV and NY had the largest voter turnout gains in both the 18-24 and 25-34 age groups by 240 percentage points. Hispanic voter engagement had an effect on advertising, with political ads on Univision jumping 67% from 2014 to 2018. “As the leading Hispanic media company in the US, we take seriously our responsibility to inform and empower our audience and encourage them to participate in the political process to make their voices heard,” said Univision CEO *Vince Sadusky* in a statement. “In 2018, Hispanic voters made the crucial difference in many elections and the triple digit increases in turnout attest to the fact that our community is a vital source of support for any candidate or cause. The data tells a compelling narrative about the strength and influence of the Latino voter that will inform and shape the upcoming 2020 election.” The net’s non-partisan campaign will provide voting and election info across multiple media platforms. “We’re demonstrating our community isn’t just a niche community. Our community is America, and our community has to be spoken to,” *Keith Fernandez*, director of communications, policy & social impact for the company told **CFX**. “It’s in our DNA serving Hispanic America. We want to make sure our audience is informed and empowered when they vote.”

**Batter Up:** YouTube and Major League Baseball signed their first-ever exclusive live game distribution partnership. In the second half of the season, YouTube and YouTube TV will stream 13 games globally (with select territories excluded) with exclusive distribution rights in the US, Canada and Puerto Rico. The games will stream on MLB’s official YouTube channel and an upcoming channel on YouTube TV. All 13 matchups will also have a pre-game and post-game show. Terms of the deal and specific games are yet to be announced, but this marks the Google-owned platform’s biggest live sports deal so far. MLB launched its YouTube channel in 2005, which saw 1.25bln channel views in 2018.

**Shoot for the Moon:** Smithsonian Channel is celebrating the 50th anniversary of the moon landing with a variety of programming. The six-part series “Apollo’s Moon Shot” will explore the moon program through Apollo artifacts from the Smithsonian’s National Air and Space Museum, alongside a companion augmented reality app allowing users to participate in the mission. The series premieres June 26 at 8pm and the app will be available for free in June. The net is also premiering a one-hour doc “The Day We Walked On the Moon” reliving the 24 hours when humanity first stepped on the moon, featuring astronauts from the Apollo 11 mission, members of mission control, and the children of *Neil Armstrong* and *Buzz Aldrin*. The doc premieres July 7 at 9pm.

**Ratings:** Sunday night’s “Game of Thrones” on **HBO** hit a new series high with 17.8mln viewers, including two linear airings from the evening and streaming on HBO NOW and HBO GO. Its premiere at 9pm hit 12mln viewers, a season high for the time period broadcast. The ep broke the record for the season premiere set two weeks ago, which saw 17.4 million viewers tune in. HBO also saw a series high for “Barry,” with 2.5mln viewers for the night and just over 2mln viewers for the 10:30pm broadcast. -- **Fox News** finished April as the most-watched net among total viewers in both total day (1.4mln viewers) and primetime (2.4mln). **MSNBC** finished the month with 1.66mln total viewers in primetime, followed by **CNN** with 545K. -- **Freeform’s** “Marvel’s Cloak & Dagger” grew for the second straight week among W18-34 (19% to 86K) and Adults 18-49 (4% to 182K). The series hit season highs in all three **Nielsen** measures.

**Programming:** Paramount Network ordered 10 one-hour episodes of scripted comedic drama series “68 Whiskey” from Oscar-winning executive producers *Brian Grazer* and *Ron Howard*. -- The three-part reunion of “Vanderpump Rules” premieres May 6 at 9pm on **Bravo**, with the subsequent episodes airing May 13 and May 20, both at 9pm. -- **Travel Channel** will premiere “America Unearthed” on May 28 at 10pm. The 10-episode series follows forensic geologist *Scott Wolter* exploring some of America’s most buried secrets.