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What the Industry Reads First

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Stay Happy: WOW! Wins with Customer Care Focus

For WOW!, the 1Q19 story was one of customer care and lowering churn. Churn in the quarter was the best the provider has seen in any quarter for at least two years, driving subscriber growth of 4600 net additions and 6300 HSD RGU net additions. As far as what's driving that churn improvement, WOW! CEO *Teresa Elder* attributes much of it to efforts to raise the bar on customer care. Part one was all about removing bad volume from the business. "Our field and care teams, under the leadership of our chief customer experience officer [*Don Schena*], working alongside our IT organization are focusing on ways to enable self-care, reduce wait times and drive automation all in an effort to drive fewer unnecessary truck rolls and calls," Elder said on the company's 1Q19 earnings call Tuesday. WOW!'s Whole Home WiFi solution has already been a success on that front, with Elder claiming that there are "virtually no care calls associated" with the product. WOW!'s edge-out initiative was another bright spot on the earnings report, with the company announcing that it has extended its network by more than 147K new homes passed as of March 31. "The investments the company has been making in customer service appear to be bearing fruit in terms of lower subscriber churn, and edge-out activity looks to be on pace with 9200 homes added in 1Q19," **Evercore ISI** said in a research note. But WOW! isn't the only provider stepping up its game on customer care. The focus now is no longer on coming together in mergers. Rather, it's all about keeping what you already have safe and sound. "Competition remains robust, but we really haven't seen a significant change in competitive behavior on the acquisition front," Elder said. "I think as broadband becomes more prevalent, we see competitors take a stronger stance on retention and that's had some impact on us." While the debate around de-emphasizing video has only continued to ramp up, Elder indicated that WOW! won't be cutting the cord anytime soon. "We view ourselves as a customer-focused company that is all about increasing our customer relationships. We look at the overall subscriber base and how we can keep and grow that subscriber base, whether it is in broadband or in packages and continuing to offer our customers what they want in a profitable way," Elder said. "We are not just focused on broadband, although we definitely put that at the forefront of our business."

Nielsen Ads: Nielsen is leaning into advanced, addressable advertising in 2019, touting itself at its NYC upfront

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Tuesday as a leading pioneer in automatic content recognition technology and dynamic ad replacement. As you might expect, the measurement firm's event was chock-full of numbers. Americans use connected TV devices (CTV) for nearly 10bln hours per month. Of that, 36bln is spent on linear TV, with 9.5bln coming in on any CTV device. Smart TV usage saw a 50% YOY growth, and TV delivers nearly eight times more impressions than digital (for campaigns targeting 18-49 year-olds). In 2019, there was a 21% increase in time using connected TV devices, which actually led to a decline in daily TV usage. After the purchase of a streaming device, time spent per day using a TV dropped by 19 minutes after a month. But 12 months later, it drops by over an hour. Heading into 2020, there's a predicted \$4.7bln TV ad spend using advanced audiences. Nielsen sees the power of addressable advertising across three dimensions—precision advertising, value targeting and measurement. "What's really starting to unlock all this is bringing best-in-class measurement so that advertisers and programmers can have similar audience segment definitions in which to transact on any type of inventory that they're selling, whether on the linear television screen or actually through digital devices," Kelly Abcarian, gm, advanced video advertising, said at the event. In an addressable TV pilot with **Sorenson Media** that took place over the course of six month, the companies saw 29mln dynamic ad insertion opportunities across 16mln smart TVs, with 7mln commercial DAI impressions. "We're in the market today with our advanced audience suite. And what that's enabling the ecosystem to start to transact on is to start to drive more and more transactions on an advanced demographic buy-and-sell. Not just using age and gender any longer, but really talking about dog owners or looking at detergent buyers," Abcarian said. -- Over in the SVOD space, Nielsen is able to start using data to measure ratings and numbers from **Netflix**, **Amazon** and **Hulu**. In TV households with OTT-access, 69% have an SVOD of some kind. Of that, 63% have Netflix, 44% Amazon Prime and 23% subscribe to Hulu. Looking at Netflix, its investment into original content is paying off. Of its top 20 most-watched programs by minutes, six are originals. Top shows watched are the US version of "The Office," "Friends," and "Grey's Anatomy," and its top original is "Orange is the New Black." However, with the upcoming launch of streamers from **NBCU**, **Disney** and **WarnerMedia**, it's quite likely those rankings will drastically shift.

Ad Highs: US digital advertising revenues in 2018 hit an all time high, reaching \$107.5bln, according to the **IAB**. Mobile and video primarily drove growth, which is the first time revenue has surpassed \$100bln. Mobile alone accounted for 65% of the year's internet ad revenue, reaching \$69.9bln, up 40% from 2017 at \$50.1bln. Digital video ad revenue saw the largest gain, jumping up to \$16.3bln from \$11.9bln.

Rebrand Time: **Univision Deportes** is rebranding to 'TUDN' and putting even more emphasis on soccer. The brand

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will debut this summer and will introduce a suite of additional live soccer offerings later this year. Subs to participating pay-TV services in the US will have access to TUDN's exclusive matches through TUDNextra, and Zona Futbol will deliver concurrent matches as they happen. The net also will debut more than 20 personalities and multiple new content offerings. Other news from Univision's pre-upfront announcements Tuesday is the addition of a 10pm newscast on **UniMas** at 10pm with *Enrique Acevedo* and *Patricia Janiot* and the launch of Univision Brand Labs, a suite of services to offer customized solutions to advertisers.

TV Docs: **MTV** landed longtime **HBO** exec *Sheila Nevins* as the head of its new Documentary Films unit. The producer was the president of HBO Documentary Films, and has 1,500 credits to her name. Nevins will oversee MTV's new division as it develops content for third-party streaming services, premium nets and MTV's platforms. Nevins' projects won 28 Oscars, 44 Peabodys, and the producer won 34 Primetime Emmy Awards. She spent 38 years with HBO before stepping down last year.

Georgia Peach: **Windstream** finished a major broadband upgrade in northern Georgia, giving 71K consumers access to 300 Mbps Kinetic internet. The boost comes after the provider promised last year to boost internet speeds for 67K households in the area. Windstream also made upgrades to the network in Hayesville, NC.

Game, Set, Match: **Tennis Channel** and the **USTA**, in conjunction with the **NCAA**, have agreed to a three-year partnership to make the network the exclusive home of the NCAA Division I Men's and Women's tennis national championships. The deal kicks off with this year's events, to be held in Orlando from May 16-25. Over the course of the tournaments, Tennis Channel will air more than 50 hours of live matches with coverage on each day of competition.

T-Mobile Launch: **T-Mobile** and **Sprint** chose Henrietta, NY, as their location for their Greater Rochester area Customer Experience Center. The CEC facility is subject to the close of their potential merger, however. New T-Mobile says the spillover effects of its investment will generate 500 to 600 jobs in addition to the 1,300 direct CEC employees in the region.

Big Impact: In celebration of National Small Business Week, **Facebook** is making it easier for small businesses to advertise on the social network. The company has introduced an automated advertising tool that, based on a few questions and existing images on the business page, will offer different versions of an ad and suggestions on who to target and what to budget. An appointment bookings option will allow service-based businesses on Facebook and Instagram to manage appointments and customer information. Small businesses will also have access to new video creative tools to create videos for mobile.

Windy City: **Newsy**, a **Scripps** brand, is continuing its expansion into the Midwest. In Chicago, the net built a 21K sq-ft production space, including three state-of-the-art studios. It also hired dozens of new team members across its enterprise, including *Sean Breedlove* as vp of data and analytics, *Ahmed Al-Kalby* as director of OTT programming, *Francis Kane* as vp of partner marketing solutions, *Brandon Clements* as supervising producer of "The Briefing" and "Today's Headlines", *Peter Hecht* as content producer/news editor and *Teghan Collins* as director of social & consumer engagement.

Ratings: **Hallmark's** new seasonal programming franchise "Countdown to Summer" kicked off Saturday night with the premiere of original movie "Paris, Wine & Romance," which pulled in an average of 2.3m total viewers. It was the highest-rated (2.3HH) and most-watched program of the day and pushed the net to be the highest-rated and most-watched on cable (excluding news) during weekend primetime.

Programming: Family saga "Ambitions" is set to premiere on **OWN** on June 18 at 10pm. -- **TLC's** dermatology series "Dr Pimple Popper" will return on July 11 at 9pm. The TLC Go companion series "This is Zit" will also air new episodes in July. -- Season 2 of "This Close" will premiere on **SundanceTV** on Sept 12 at 9pm. The expanded second season will also air on Sundance Now. -- **Pop** will premiere original comedy series "Florida Girls" on July 10 at 10pm. The show is inspired by creator *Laura Chinn's* real-life struggle growing up on the west coast of Florida. -- **EPIX** and **NFL Films** are teaming up this fall for a new weekly series "NFL: The Grind." The show premieres Sept 11 at 9pm and will air 17 episodes throughout the entirety of the 2019 football season. A currently unnamed host will guide fans through up close look at life inside the NFL and a weekly deep dive into the games. Original field pieces will have alternating NFL veterans hosting.

People: **BBC Studios** and **Lionsgate** named *Dan McDermott* as head of their television partnership. McDermott began his career at **Fox Broadcasting** as evp, programming before serving as the first president of television for **Dreamworks**. -- **Lifetime** tapped *Nicole Vogel* as vp, programming and development. She comes over from **WE tv**, where she served as director of development.