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What the Industry Reads First

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Happy Anniversary: A Look at AT&T-Time Warner One Year Later

It's been a year since **AT&T** and **Time Warner** tied the knot, and, well, a lot has happened. For those who are still tripping over saying **WarnerMedia** instead of **Turner**, we've put together this guide of highlights (and lowlights?). **It's only sort of the anniversary.** Sure, AT&T closed on Time Warner on June 14, 2018, but it was with a big asterisk since the **DOJ** continued to pursue its fight to break up the union. It wasn't until Feb 26 of this year that the **DC Circuit Court of Appeals** upheld the \$85bln merger. While AT&T management appeared very confident the company would prevail, some high profile Time Warner execs, such as **HBO** chmn/CEO *Richard Plepler* and Turner pres *David Levy*, didn't depart until after the court weighed in. While DOJ didn't prevail, antitrust chief *Makan Delrahim* used an appearance at **ACA Connects'** Summit in March to stress that the antitrust division wouldn't hesitate to bring similar cases in the future. "The Department of Justice was and remains skeptical of an arbitration remedy where a structural remedy is available," Delrahim said. **There's going to be some kind of streaming service.** We've heard repeatedly it'll debut in beta in 4Q. But the latest reports suggest WarnerMedia is shifting from a three-tiered offering to a more robust—and expensive—single offering that would incorporate HBO, **Cinemax** and the Warner library. "The product is designed to fit between the 'all you can eat' focus of **Netflix** and the thinner, more quality-oriented offering from **Disney**. In short, think Disney with a deeper library of A-titles or Netflix with fewer B and C products," **MoffettNathanson** said, citing discussions with WarnerMedia boss *John Stankey*. During **TCA**, WarnerMedia DTC chief content officer *Kevin Reilly* talked up the potential of using the DTC offering to give viewers a complete experience. "When we have a season of something on one of our linear networks that is now playing in a long tail on the SVOD platform, they can work together; not only to market, but to create an equation where two plus two equals five and not that there's a break in the consumer experience," he said. **Integration continues...** There's still a flurry of a new hires, departures and some layoffs at AT&T continues integrating Time Warner into the fold. But there are already some concrete fruits of the merger. A little more than six months after closing the deal, Turner and AT&T's ad business **Xandr** began working together to improve ad relevancy. AT&T and HBO launched a joint marketing campaign ahead of the "Game of Thrones" premiere that included retail activations, VOD and event sponsorship integrations. Then there was the rejiggering of **DirectTV Now** to include two new video packages that include the premium net. More is on the way,

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including plans to bring AT&T's largest collection to-date of 5G experiences and demonstrations, as well as an expansive lineup of 5G thought leaders, to Warner Bros June 22-23 in L.A. for AT&T SHAPE, an immersive event exploring the convergence of technology and entertainment. **The jury is still out...** AT&T paid more than \$100bln for Time Warner when you include the debt it took on. And given some lackluster sub numbers out of DirecTV, which AT&T acquired in 2015, some are questioning where it has what it takes to make the deal work. Others argue vertical integration with strong content is the only way to survive in the media landscape. Comcast seems to have gotten the hang of it, but with AT&T shares trading around the same as it was a year, some are still on the sidelines.

Joining The X1 Universe: Pluto TV launched on Comcast's X1 platform Thursday after previously being made available to its internet-only customers through Xfinity Flex. The expansion comes a week after Pluto announced that the AVOD will soon be launching on Cox Contour, and it won't be Pluto's last. **Viacom CEO Bob Bakish** also told attendees of the recent **Credit Suisse 21st Annual Communications Conference** that a carriage deal with a third MVPD will be announced soon.

Pick Up the Phone: How folks access the internet is changing dramatically and now 37% of US adults say they mostly use a smartphone as their primary device for accessing the web. That share has doubled since 2013, according to a **Pew Research Center** survey. Some of that seems to be generational, with 58% of those aged 18-29 reaching for their phone ahead of their laptops or tablets. This shift is also leading some to ditch in-home broadband all together, with 27% of adults saying they don't subscribe to the service. Among those choosing not to subscribe to broadband services, 45% say their smartphones allow them to accomplish all that they need to do online and 23% called their smartphone the most important reason for not having a high-speed connection where they live. It has now surpassed cost as the highest barrier blocking the adoption of high-speed internet, with only 21% saying the cost of a monthly subscription is the top reason to not have the service.

Row Your Boat: Fox Corp. joined **Project OAR**, the addressable advertising consortium. Members also announced the creation of an Agency Advisory Committee, with participation pledges from **Publicis Media, Omnicom Media Group, GroupM, IPG/Magna, Dentsu Aegis Network, Havas** and **Horizon Media**. Fox, **Disney Media Networks, WarnerMedia, Xandr, FreeWheel, NBCU, CBS, Discovery, Hearst Television, AMC Networks**, as well as smart TV company **VIZIO** and TV data company **Inscape** will all serve as members of the primary Steering Committee, working to create standard by which all parties in the TV ecosystem can collaborate and unite on addressable advertising.

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Sports Marketing: **CBS Sports Digital** is launching the MVP Sports Marketing initiative, which aims to help brands build sustainable engagement in local sports communities across the US. The in-house team will partner with brands to develop multi-faceted sponsorships designed to build brand equity, deepen consumer relationships and drive revenue in high school and college sports. The team is led by *Andy Beal*, pres and founder of **MaxPreps**, a high school sports property in the US.

Joining the Pack: **Frontier** has joined retrans reform group **American Television Alliance**, which is comprised of cable and satellite providers, independent programmers and consumer groups. Frontier will join other recent additions **Ride TV**, **MAVTV**, **REVOLT** and **Cinémoi**.

Match Point: **Tennis Channel's** 15-day coverage of the French Open averaged 266K viewers in 2019, up from 187K average viewers in 2018, a 42% jump. The Open also generated more revenue for the net's streaming service than any platform in its history, with Tennis Channel Plus taking in more than \$1m in subscriber revenue from the first day of qualifiers to the championship on Sunday. This marks a 25% YOY increase and a more than 500% increase from 2014, when the service launched.

Stand-Up Latinos: **HBO Latino** and the **New York Latino Film Festival** partnered up to launch the "Latinos Stand-Up" competition, searching for the best Latino stand-up comedians around the country. The top five comedians will perform, and a winner will be chosen at a live event on Aug 16 at the festival. Applicants must submit a 3-5 minute video online by June 28.

News Time: **FloSports** launched new apps on **Apple TV**, **Amazon Fire TV** and **Roku**, allowing users to stream live events and content across a network of more than 20 sports. Improvements were made to navigation, stream switching capabilities, instant auto-play and content automation.

Ratings: Wednesday night's Game 7 of the **Stanley Cup Finals** on **NBC** averaged 6.7m OOH viewers, according to **Tunity Analytics**. OOH Viewership was up 136% over Game 6, the highest of the series, for an audience skewed 57% A25-54 and 73% male. -- The season finale of **WE tv's** "Braxton Family Values" on June 6 brought season-high ratings across W18-49, W25-54 and A25-54. The finale drew in 1.1m total viewers in **Nielsen L+3** ratings, up 30% over the previous week. -- The June 9 premiere of "The Legend of 5 Mile Cave" on **INSP** was record-setting for the network, garnering an .844 Nielsen rating with viewers over 50

Programming: It's nearly Christmas, at least according to **Hallmark**. Its annual "Christmas in July" programming event kicks off July 1 on Hallmark Movies Now with "Jingle in July." Programming takes place across HMN, Hallmark Channel and Hallmark Movies & Mysteries throughout the entire month. -- **Hulu** ordered eight-episode series "Fertile Crescent" (wt), a drama following the Syrian civil war through the eyes of a young French man. -- **History** will premiere nonfiction series "The UnXplained," hosted by "Star Trek's" *William Shatner*, on July 19 at 10pm. The eight-episode anthology series tackles mysterious subjects that have remained unexplained for centuries. -- Get ready to gym, tan, laundry. **MTV's** "Jersey Shore Family Vacation" comes back for a third season on July 11 at 8pm. -- **Discovery Channel**, **MotorTrend TV** and the **MotorTrend App** are teaming up for live coverage of the 4th Annual Barrett-Jackson Northeast Auction. Coverage kicks off June 27 at 2pm on MotorTrend TV and the app, with 18 hours of exclusive live coverage following on MotorTrend. Coverage swaps to Discovery on June 29 from 2-4pm, before wrapping up on MotorTrend. -- **Bravo's** new docuseries "Flipping Exes" kicks off August 6 at 10pm, following former couple *Nina Klemm* and *Michael LeSure* who turned their breakup into a business flipping homes. -- **MTV Studios** is bringing in *Tracee Ellis Ross* as the voice and executive producer of "Jodie," a spin-off series based on MTV's "Daria."

People: *Karen Gray* has been named evp, HR for **A+E Networks**. She'll oversee global HR initiatives with a focus on company culture and the people powering it all. Karen joins A+E from **Christie's Inc**, where she most recently served as head of HR. -- Global sports media tech provider **Deltatre** tapped *Bhavesh Upadhyaya* as vp of online operations in the Americas. He most recently served as **Verizon's** vp of professional services. -- **Beachfront**, a programmatic video advertising platform, hired *Ben Abbatiello* as its new vp of advanced TV. He comes over from Beachfront rival **SpotX**, where he was most recently chiefly responsible for strategic partnerships.

Obituary: **NATPE** founder and former president *Lew Klein* passed away at the age of 91. Klein started in the programming department of Philadelphia's **WFIL** in the 1950s. From 1984 to 1993, Klein served as president of **Gateway Communications**, which owned four **CBS** affiliates in New York, Pennsylvania and West Virginia. Beyond broadcasting, Klein held the role of adjunct professor at **Temple University's** School of Communications for 65 years. A memorial service will be held with the date to be determined.

PROGRAMMER'S PAGE

Smithsonian Celebrates Moon Landing

“One small step for man, one giant leap for mankind.” Fifty years ago, the first American astronauts walked on the moon, and **Smithsonian Channel** is celebrating in a way only the network could. “Apollo’s Moon Shot,” a six-episode series chronicling the Apollo missions, premieres June 16 at 8pm. “It’s arguably the most important moment in human history, and after 50 years we’ve forgotten a lot of the details,” *Tim Evans*, ep of the series, told **Cablefax**. “Between *Alan Shepard* and *Neil Armstrong* stepping on the moon, there were 23 manned launches and 41 American astronauts that went into space against death defying odds, and we’ve forgotten about that.” The series features newly unearthed footage from **NASA**, and also has a companion AR app. “Some of the fun in making the series was discovering these mind-boggling achievements that have been overlooked over the years,” said Evans. “On screen is this amazing iconic footage from NASA, and over the years a lot of the footage has been not quite lost, but hidden away. For over a year our team was scouring the country for footage that hadn’t been seen in over 50 years, literally tucked away in a cave in Kentucky for safekeeping.” The biggest challenge in producing the series was quite literally finding the footage, especially as visual and audio was frequently shot separately. “There are pieces of film we all know, but finding film shot from another angle, or film that was taken at the time and then tucked away,” said Evans. “Part of our challenge for all of our researchers was not finding the rare images, but is there a soundtrack associated with that, and where is that, and can we loop them together? It was a challenge, but it becomes so much more richer. Back then they knew they were making history, but they didn’t realize people would want to see it 50 years down the line.” – *Mollie Cahillane*

Reviews: “Das Boot,” series premiere, begins streaming Monday, **Hulu**. “40 guys, no shower, one [toilet]. You want to know more?” That’s how a character in the first episode of this excellent WWII drama describes life on a U-boat. But it’s the sweaty, claustrophobic atmosphere that “Das Boot” captures that makes this 8-part series worthy of following in the wake of *Wolfgang Petersen’s* 1981 hit film of the same name. Beyond excellent underwater scenes, an international cast delivers excellent performances in the land-based portion of the series. The best part is that in a plot-line centering on “40 guys,” this Das Boot features strong female characters too. Both *Lizzy Caplan* and *Vicky Krieps*, a fine actor from Luxembourg, are excellent. -- “Hogan,” premiere, Monday, 9pm ET, **Golf**. The first of this 2-part doc about *Ben Hogan* is so good, even non-golfers will find it compelling. If you’re a golfer, though, you could turn off the sound and watch the copious footage of the old master’s sweet swing. It’ll shave a stroke off your game. On the other hand, you’d miss the compelling story of a poor kid from TX who taught himself golf after earning 65 cents/day as a caddy. The opening hour, “Perseverance,” is aptly titled. Hogan was the embodiment of hard work. That sweet swing came from intense practice. – *Seth Arenstein*

Basic Cable P2+ Prime Rankings* (06/03/19-06/09/19)		
Mon-Sun	MC US	MC US AA (000)
FNC	0.746	2,278
MSNBC	0.503	1,537
HGTV	0.415	1,267
HIST	0.338	1,032
USA	0.328	1,002
A&E	0.323	985
HALL	0.319	973
TBSC	0.308	939
TNT	0.301	920
TLC	0.298	912
ESPN	0.291	889
ID	0.291	888
DISC	0.284	868
FOOD	0.251	768
CNN	0.234	716
ADSM	0.229	698
NICK	0.223	680
FX	0.208	635
BRAVO	0.205	626
INSP	0.199	608
TVLAND	0.198	605
DSNY	0.193	591
NATGEO	0.184	563
AMC	0.177	540
NAN	0.171	523
HBO	0.170	518
APL	0.151	460
GSN	0.146	444
TRAVEL	0.145	443
WETV	0.144	440
LIFE	0.142	433
DSJR	0.135	413
VH1	0.133	406
SYFY	0.130	397
NKJR	0.122	372
MTV	0.121	370
CRN	0.119	363
FRFM	0.118	360
HMM	0.116	354
OWN	0.115	350
FXX	0.108	331

*P2+ L+SD rankers are based on national Nielsen numbers, not coverage.

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