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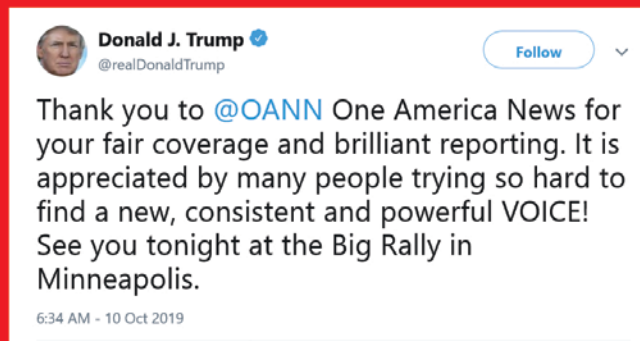
Friday — October 11, 2019

What the Industry Reads First

Volume 30 / No. 196

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3Q Preview: Cable Shines as Netflix Needs to Impress

We're less than a week away from another round of earnings, and early predictions have folks far more optimistic about what's to come from cable's biggest players than the superstars of streaming. **Netflix** is first up to bat, making its report on Wednesday. And for the first time in a long time, the streaming giant has something to prove. Netflix saw its first domestic subscriber loss in 2Q19 and firms have lowered their expectations of what's to come in a few weeks. **Goldman Sachs** is the latest to make an adjustment, lowering its price target on Netflix to \$360 from \$420 Thursday morning. Analyst *Heath Terry* wrote in a research note that while he expects subscriber growth to come in below guidance, Netflix's 4Q19 programming slate is strong enough to expect increased subscriber growth numbers. The return of hits like "The Crown" could be enough to pull more eyeballs away from pay TV. "We continue to believe that traditional television (broadcast, basic/premium cable) creates the largest opportunity for Netflix, and streaming in general, to take share," Terry said. And we'll have to wait and see what effect, if any, **Disney+** has on the company's base moving forward. Wall Street has been kind to cable companies as of late, appreciating the expanding EBITDA margins that have come as more lean into their broadband businesses and put less pressure on or more or less abandon their video operations. **MoffettNathanson** recently raised its price targets on **Charter**, **Altice USA** and **Comcast**, saying the evidence for margins substantially higher than 40% is no longer debatable. "As video fades as a percentage of revenue, the cable business gets closer and closer to being a pure telecommunications business," analyst *Craig Moffett* said in a report, noting there are plenty of telecom business with margins in the 50% range. "**Verizon Wireless**, to cite just one example, has margins of nearly 70%, and that's in a four player wireless market that is structurally far more competitive than cable." **Evercore ISI** is keeping a particular eye on **Comcast**, which announced in September that its Xfinity Flex product would be available to all broadband-only customers for free moving forward. Analyst *Vijay Jayant* wrote that he expects other cable operators to quickly follow suit with similar offerings. "We see Comcast's expanded Flex rollout as positioning the company well in providing aggregation, discovery, and billing, integrating an increasingly fragmented SVOD landscape for the consumer, and thereby increasing the value of the company's core broadband offering," Jayant said. Moffett told **CFX** he'll also be keeping



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an eye on the wireless marketplace, which got a bit more crowded in early September with the introduction of the very affordable **Altice Mobile**. Investors will be looking for early results from **Altice USA** on the product as well as from Charter on its Spectrum Mobile offering, which has slowly ramped up marketing since its launch in July 2018.

FreeWheel Finds Growing Interest in Advanced TV Ads: Advanced TV solutions are changing local market advertising, according to research from **Comcast's FreeWheel**. Local media planners and buyers are expecting their spending to rise over the next 12 months, and 79% report being "extremely or very interested" in using advanced TV, almost as high as local TV and cable (87%). The survey found that 78% said they expect their spending on advanced TV to increase over the next year, and more than 20% of buyers expect to decrease spending on network, cable and local TV. The top three reasons cited by local and regionally focused agencies for using data-driven, audience-based TV advertising solutions were delivering hard to reach audiences, reducing wasted impressions delivered out of target and improving cost efficiencies.

FCC Approves Another Wave of CAF II Funding: The **FCC** authorized the sixth round of funding from the Connect America Fund Phase II auction Thursday, funneling another \$61.8mln in funding over the next decade to expanding broadband service. This wave is expected to bring high-speed internet to nearly 22K unserved rural homes and businesses in 14 states. Receiving the funds are **Sunset Digital Communications** (\$29.6mln), **LocalTel Communications** (\$6.8mln), Gallatin Wireless Internet (\$4mln) and the three companies **Inventive Wireless**, **Tri County Telephone** and **Union Telephone** (\$12.2mln).

Quibi and Telemundo Partner: **Telemundo** is developing two new shows for Hispanic audiences with upcoming mobile platform **Quibi**, launching April 2020. The net will produce daily news programming and an entertainment news show. Both will be produced in English at the net's headquarters Telemundo Center in Miami. The news show will reflect the Hispanic perspective, and a five-minute rundown of the day's entertainment news.

IT Outage Strikes Cisco: Thursday morning was anything but normal for **Cisco** employees, who journeyed to their desks only to see many of their resources offline due to an internal IT outage. "We're aware of some disruption to our IT systems and we're working on restoring them as a top priority," Cisco tweeted Thursday morning in response to one user who was unable to reach the Cisco blog. Those attempting to access it instead were met with the WordPress installation page. Others affected were unable to use Cisco's single sign-in or the company learning portal. The company tweeted again at 3:30pm explaining that the disruption was due to a change in its internal systems



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and services “are in the process of being fully restored.”

ESPN Goes 4K: **Samsung** and **ESPN** have partnered up to deliver certain regular season college football games live in native 4K. It kicks off with Saturday’s matchup between No. 7 University of Florida and No. 5 LSU at 8pm on **ESPN** and **DirectTV**. The agreement is part of “Samsung QLED 4K Game of the Week.”

Tru Optik Launching Piracy TV Solution: **Tru Optik** is introducing a free privacy compliance solution for CTV and advanced media. Privacy.TV will roll out in Q419 in beta and will be commercially available in 2020. The company says it will offer OTT consumer opt-out and data transparency capabilities for publishers, ad tech platforms, data providers and device manufacturers. Privacy.TV will reconcile against Tru Optik’s 80mln household graph and update every 24 hours. It’s platform agnostic, meaning a consumer can opt-out the entire household vs only a specific device.

You.i TV Scores Deal Down Under: **CBS-owned Network 10** of Australia partnered with **You.i TV** to standardize its 10 Play VOD app across its streaming platforms. That includes **Telstra TV**, connected TVs, game consoles and mobile and tablet apps. The deal will also allow for new ad formats to come to the app, including formats that are passive, interactive or non-intrusive.

Altice Labs Shows Off WiFi 6 Gateways: Altice Labs has expanded its portfolio with next-gen broadband gateways powered by RDK software. The range includes a GPON gateway with WiFi 6; a DOCSIS 3.1 gateway with WiFi 6 and a DOCSIS 3.0 gateway with WiFi 5. Altice Labs also plans to rollout an XGS-PON gateway with WiFi 6 within a few months. Devices in the portfolio will be used by **Altice Europe** and **Altice USA**.

UNX Debuts Ninja Network: **UNX** launched **UNX NOW**, what it says is the first centralized streaming network designed for watching professional ninja sport competitions. The OTT channel will initially feature daily content, including the inaugural professional competition season, a daily “UNX Fast Forward” show made up of athlete interviews, analysis of runs, home workouts and other ninja related content. The streamer debuted at \$5.99 a month with a 30-day free trial.

World Mental Health Day: **Comedy Central** partnered with Mental Health First Aid, a program of the **National Council for Behavioral Health**, for the “Be The Difference” PSA, premiering Thursday for World Mental Health Day. The spot is the first step as part of the net’s first long-term social campaign focusing on driving a culture change on mental health. Comedy Central plans to integrate the campaign across all brand platforms. -- **HBO** is launching mental health initiative “It’s OK,” designed to destigmatize mental illness and encourage conversation around mental health issues. The net will create mental health awareness bumpers and short form content running on HBO’s platforms beginning Thursday. HBO partnered with the **National Alliance on Mental Health** and the local affiliate NAMI NYC to create the bumpers.

Sprint Offers ASL Video Interpretation: A **Sprint** store in DC now has capabilities to provide American Sign Language interpretation for its customers. A video remote interpreter uses the Sprint Video Remote Interpreting app to ensure deaf and hard of hearing customers receive accessible service. The service is part of a six-month pilot program.

Adoption Ever After: **Hallmark Channel** honored *Kristin Chenoweth* with its 2019 Adoption Ever After Award, recognizing individuals who make exceptional contributions in the area of animal rescue and pet adoption. *Sarah Michelle Gellar* presented her with the award at the night annual “American Humane Hero Dog Awards” on Oct 5.

Ratings: **BET**’s Tuesday broadcast of **BET “Hip Hop Awards” 2019** pulled in 1.3mln viewers 2+ during premiere night across **BET** and **VH1**, up 9% YOY. On just **BET**, it hit 796K viewers P2+. -- **Discovery Familia** hit a five-year ratings high with “90 Day Fiancé” spinoff “Todo en 90 Dias: ¿Felices Para Siempre?” The Sept 26 premiere episode was the top program of the night among Spanish-language cable nets in demos P18-49, W18-49 and P25-54 in P2+.

Programming: “Project Runway” will return to **Bravo** on Dec 5 at 9:30pm. Host *Karlie Kloss* is returning, alongside mentor *Christian Siriano* and judges *Nina Garcia*, *Brandon Maxwell* and *Elaine Welteroth*. -- **Showtime**’s “Desus & Mero” is coming back from its summer hiatus starting Oct 14 at 11pm. Episodes will air every Monday and Thursday, and upcoming guests include *Taraji P. Henson*, *Ta-Nehisi Coates* and *DaBaby*. -- **TNT** is ready for spooky season! On Halloween the net will air a nine-hour “Supernatural” marathon, kicking off at 10am. -- **Bravo** is rebooting series “Blind Date,” premiering Nov 18 at 11:30pm. The show first debuted in 1999 and ran for 10 seasons. -- **Disney Junior** will premiere “The Rocketeer” on Nov 8 at 5pm. The animated series will also air on **Disney Channel** at 11 am and on **DisneyNOW**.

PROGRAMMER'S PAGE

The Greatest Cowboy of Them All

Country star *Trace Adkins* knows his way around the reality TV game show rodeo, having finished second in Season 7 of "Celebrity Apprentice" and winning the title in "All-Star Celebrity Apprentice." But when **INSP** premieres cowboy reality competition series "Ultimate Cowboy Showdown" Monday at 9pm ET, the deep baritone will find himself filling the role of host instead of competitor. "I'm at that beautiful position in my life where I can say yes to things just because I think they'd be something fun to do," Adkins told **Cablefax**. (For what it's worth, that's what I said the last time I danced to "Honky Tonk Badonkadonk"). Adkins doesn't just wear a cowboy hat, but owns a ranch and describes his father as a "crusty, old cowboy." Showdown is a six-night event, aimed at finding the ultimate modern day cowboy through a grueling series of physical and mental tests. Twelve cowboys—men and women—compete for a herd of cattle worth more than \$50K. What surprised Adkins most is how Showdown's contestants were so darn nice. "I was surprised how it was hard to get these cowboys to get down and dirty and go at each other," he said. "It was totally opposite of my experience with Celebrity Apprentice. You wouldn't have to do anything to get those people to cut each other's throats." That's just not the cowboy code—nor is it the code of INSP, which prides itself on drawing a family crowd. "We have tapped in to an ethos when it comes to westerns and western original programming that our viewers love. They are fiercely loyal," said INSP COO *Dale Ardizzone*. "We like to say in a world of cord cutters, we have cord cuddlers. Our viewers do not cut the cord." — *Amy Maclean*

Reviews: "Inside the Actors Studio," Season Premiere, 10pm, Sunday, **Ovation**. You're tempted to compare this series as it was with the iconic *James Lipton* hosting. Now that Lipton has retired, this season features rotating hosts, including this Sunday's *Alec Baldwin*. He's not bad. Baldwin is prepared and amiable. He even uses Lipton's trademark blue note cards, though his pile is more of a knoll than James's sky-high stack. Accordingly, Baldwin's interviewing is more casual than Lipton's cross-examinations. It works, partly because guest, *Henry Winkler*, is a relatively easy interview. Generous with his thoughts and insights, Winkler is at his best recounting how he got the part of "The Fonz." He tells the acting student audience that he made one choice, to alter his voice. Everything flowed from there. — "Why We Hate," series premiere, 10pm, Sunday, **Discovery**. The network gets back to its roots, with this timely series exec produced by doc legend *Alex Gibney* and *Steven Spielberg*. Piling on, Emmy winners *Geeta Gandbhir* and *Sam Pollard* direct. Ep. 1 offers interesting segments, scratching hate's surface. Besides looking at hate in the animal kingdom and through the frontal cortex of mass killers, *Megan Phelps-Roper* describes her childhood and breakaway from Westboro Baptist Church, the anti-gay group. It's a good overview. We're anxious to see where the series goes from here. — *Seth Arenstein*

Basic Cable P2+ Prime Rankings* (09/30/19-10/06/19)

Mon-Sun	MC	MC
	US	US AA
	AA%	(000)
ESPN	1.093	3,359
FNC	0.862	2,650
TBSC	0.814	2,502
MSNBC	0.663	2,036
TLC	0.348	1,070
CNN	0.339	1,043
HGTV	0.323	991
USA	0.286	878
A&E	0.280	861
HALL	0.280	860
DISC	0.262	804
FOOD	0.247	760
FRFM	0.241	740
AMC	0.239	736
ID	0.239	735
HIST	0.233	715
TNT	0.219	672
NICK	0.217	668
ADSM	0.191	588
INSP	0.189	582
TVLAND	0.188	579
NAN	0.187	573
FS1	0.182	559
DSNY	0.179	551
BRAVO	0.160	491
FX	0.159	488
HMM	0.146	449
SYFY	0.138	424
VH1	0.138	424
LIFE	0.136	419
MTV	0.134	413
GSN	0.131	402
NKJR	0.130	398
TRAVEL	0.127	391
WETV	0.120	369
DSJR	0.118	363
CRN	0.113	347
NATGEO	0.109	336
COM	0.104	319
APL	0.103	316
HBO	0.100	308

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







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