

Cablefax Daily™

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What the Industry Reads First

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Plus & Minuses: Smoke Clearing on Disney+ Launch, But We Bet You Heard About It

Despite #DisneyPlusfail trending on **Twitter** for a period Monday, it's a bit tough to gauge just how widespread technical problems were for the SVOD's launch. "The demand for #DisneyPlus has exceeded our highest expectations. We are so pleased you're excited to watch all your favorites and are working quickly to resolve any current issues. We appreciate your patience," **Disney** tweeted. Yes, there were people complaining on social media about access issues and streaming problems. We experienced some ourselves, but in our case at least, they were temporary and we were streaming moments later. It's hard to tell if this was a massive problem or a case of squeaky wheels since Disney declined to comment on specifics. We're also curious to see if there's an uptick in complaining tonight when folks come home from work and settle in to watch their favorite House of Mouse content. Brave of Disney to launch the service with Mercury in retrograde! **Verizon** customers who signed up saying they were interested in the 12-month free promotion of **Disney+** were supposed to get an email on Tuesday with instructions on signing up. We never received the email, but were able to easily sign up by going directly to VerizonWireless.com (the process took less than a minute). As promised, Disney launched a [site](#) Tuesday to sign up for a \$12.99/month **Hulu**, **Disney+** and **ESPN+** bundle. More is likely to come on the hits and misses of Disney+'s launch in the weeks ahead. What is clear now: Disney's marketing muscle is massive. A **MediaRadar** analysis puts Disney's spend on national TV ads in the six weeks leading up to launch at \$6mln—with more than \$1.25mln spent on national ads than ran during **NFL** games. The campaign was even spotted on the streets of NYC, with a food truck handing out "Simpsons" donuts, codes for free Lyft rides and, of course, Disney staffers ready to help folks sign up for the SVOD on the spot. The marketing was seen across all Disney properties—from **ABC's** "Good Morning America" debuting a special look at "The Mandalorian" Tuesday morning to **ESPN's** "SportsCenter" running on Tuesday a top 10 Simpsons sports moments. -- In addition to connection problems, we noted a few other grumbles on social media: not every ep of "Andi Mack" was available for streaming and that the aspect ratio for The Simpsons was stretched to 16:9 instead of the original 4:3. We're sure **HBO Max** and **Peacock** execs are taking copious notes.

Retrans Rises at CBS: Retrans was big for **CBS** once again, despite its O&Os being off AT&T for more than 20% of the

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Source: Nielsen, Unduplicated Reach, HLDRM, Persons 2+, LSD, Total Day (Mon-Sun/6a-6a), 10/18/2019 - 11/03/2019, 6 minute qualifier. Ranking: LSD coverage ratings, Households & Women 18+, Weekends (Sat-Sun/6a-6a) 10/18/2019 - 10/31/2019. Ranked among all Ad-supported Cable Networks.

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quarter. The programmer reported that revenue from retrans, reverse comp and virtual MVPDs was up 18% in 3Q19. That's likely to continue with about 50% of CBS' retrans footprint and 30% of its reverse comp footprint up for renewal next year. One of those agreements is with **Comcast**—and it's a big one considering that the two will be coming off a 10-year deal set in 2010. That deal includes **Showtime**, noteworthy given the MSO's current plans to pull back **Starz** carriage and its decision earlier this year to remove **Cinemax** from some packages. CBS CEO *Joe Ianniello* didn't seem concerned, pointing to Showtime's quality content. "I think the approach is the same and we've been successful with every other distributor getting paid fair market value," he said. Direct-to-consumer continues to be important, with Ianniello announcing a deal with **Viacom** that will add more AVOD channels to **Pluto TV** starting Wednesday (11/13). Not many details yet, with the exec saying to stay tuned for announcements. Overall, CBS 3Q revenue grew 1% to \$3.3bln (total affiliate and subscription fees grew 12%, representing more than a third of overall revenue in Q3). Operating income, which included costs incurred in connection with the pending Viacom merger, fell to \$501mln vs \$690mln a year ago.

Nexstar-Tribune has Comcast on Deck: One of the first big tests for the combined **Nexstar-Tribune** will be a retrans renewal with **Comcast**. The MSO's contract for Nexstar broadcast stations, as well as cable net **WGN America**, is up next month. Comcast has a busy month of negotiations ahead of it. **Tegna's** contract also is set to expire in December, and **Starz** has been vocal about Comcast's plans to replace it in various subscription packages next month.

AMCN SVODs Ready for Spectrum Debut: Charter has started to let customers know that a suite of **AMC Networks** streaming services are headed their way. Maine subs were informed that SVOD services would be available on or after Dec 17. AMCN announced the Charter carriage agreement during its Oct 31 earnings call. Customer can opt for **AMC Premier Service** (\$4.99/month), **Acorn TV** (\$5.99/month), **Shudder** (\$5.99/month), **Sundance Now** (\$6.99/month) and **Urban Movie Channel (UMC)** (\$4.99/month). Looks like AMC Networks' suite isn't the only SVOD Charter's offering up. It's also started notifying some customers of the availability of exercise/yoga-centric **Gaiam TV** (\$6.99/month).

Top Broadband Providers Pass 100mln Subs: It's been a good quarter for broadband providers, with the top companies acquiring 605K net additional subs in 3Q19, up from the 600K gain a year ago. According to **Leichtman Research Group**, Charter saw the most net adds this quarter, gaining 380K for a total of 26.325mln subs. **Comcast** followed with 379K adds.

Discovery Partners with Inscope: Discovery and **Vizio's Inscope** teamed up for a measurement pact that will cover data from more than 12mln smart TVs. Discovery says it plans to use the screen-verified, opt-in viewing data

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to supplement panel-based **Nielsen** data across all DMAs, use cross-platform audience insights to understand audience behaviors across TVE, VOD and linear environments and understanding how show promos drive viewership across all viewing environments. Discovery also believes the Inscope data will help the company understand what drives subscriptions to its recently launched DTC product, **Food Network Kitchen**.

Plepler in Talks with Apple TV+, Reports: **Apple TV+** could soon be adding even more talent to its roster. The *WSJ* reported that former **HBO** chmn/CEO *Richard Plepler* is in advanced talks to sign an exclusive production deal with the recently-launched streamer. Under the agreement, Plepler's new production company **RLP & Co** would create original content for the service. Plepler left HBO at the end of February after three decades with the company. He was elevated to CEO in 2012 from his role as co-pres.

PTC Likes Maine Law: The **Parents TV Council** has long been a fan of a la carte TV, so it should come as no surprise that it has come out in support of a Maine law that would require consumers to have the ability to choose and pay for only the cable networks they want. **Comcast, Disney, Fox** and others are challenging the law in federal court. "By passing the nation's first law mandating Cable Choice, legislators in Maine deserve praise for boldly standing up for the interests of consumers, and for standing up against the financial interests of Big Cable. Having lost the fight in the court of public opinion, the cable industry is now turning to the federal courts to protect their bundling scheme. We hope the court sees through the cable industry's flimsy arguments and puts Maine consumers first," PTC pres *Tim Winter* said in a statement. "The Maine law may not be perfect, but its public policy objectives are pure. We call on state and federal authorities across the nation to adopt similar legislative remedies for cable and satellite consumers." A ruling is expected shortly, possibly near the end of this month.

More Retrans Deals for AT&T: **AT&T** has ticked a few more retrans deals off its to-do list. **Howard Stirk Holdings' WEYI** in Flint, MI, and its **CW** affil in Myrtle Beach, SC, returned over the weekend to **DirectTV** and AT&T. The deal came after the **FCC's** decision Friday to find in favor of AT&T in its good faith complaint against Stirk and eight other broadcast station groups, all managed by **Sinclair** through shared services agreements. AT&T also informed the FCC Friday that it's reached a deal with another of those groups, **Roberts Media**. It previously reached deals with **Deerfield Media, GoCom Media** and **Second Generation of Iowa**, which were all part of the initial complaint.

Ratings: "College GameDay" on **ESPN** delivered its best viewership of the season on Saturday, and its best non-Thanksgiving weekend audience since 2015. Ahead of the Alabama vs LSU matchup, the show delivered an average of 2.214mln viewers across its three hours, up 8% over the same matchup last year. ESPN was the No 1 rated cable network in prime last week, averaging 3.08mln P2+. -- **Hallmark Channel** finished fourth in prime last week (1.5mln). It continues to find success with its "Countdown to Christmas" programming event, making the net No 1 on cable among HHs, W25-54 and total viewers since its launch on Oct 25. This past weekend's "Picture a Perfect Christmas" and "The Mistletoe Secret" averaged 2mln total viewers and 514K in W25-54. -- **Fox News** spent its 44th week as the most-watched cable net across total day from Nov 4-10. It averaged 1.5mln viewers in total day and 2.675mln in primetime. **MSNBC** came in second in news, averaging 1.18mln in total day and 1.949mln in primetime, followed by **CNN** with 690K in day and 915K in primetime.

Steve Irwin Day: It's been 13 years since the world lost *Steve Irwin*, but **Animal Planet** is keeping the Crocodile Hunter's memory alive with the annual Steve Irwin Day on Nov 15. Starting at 6am, the net will air an all-day marathon of "The Crocodile Hunter: Best of Steve Irwin" until 6pm. From 7pm-10pm viewers can catch up on "Crikey! It's the Irwins," and watch *Bindi Irwin* name a whale shark after her late father. From 10pm-11:30pm the net will air a special viewing of "The Steve Irwin Story."

Public Affairs: **DISH's** fifth annual Day of Service on Sept 28 saw nearly 800 volunteers donate their time at 56 different events, totaling 2,358 hours of community service. Since 2015, DISH employees have donated more than 25K hours of service across the country.

Programming: **WGN America** is bringing back "Carter" for Season 2 on Jan 20, 10pm. -- **Ovation** acquired non-exclusive US broadcast rights for additional seasons of "Travel Man," "Gordon's Great Escape" and "Midsomer Murders" in a deal with **All3Media**. Seasons 7 and 8 of Travel Man and two seasons of Gordon's Great Escape will air in 2020, and seasons 7 to 11 of Midsomer Murders begin premiering on Thursday. -- **TLC** is kicking 2020 with six returning shows. "My 600-lb Life" premieres Jan 1 at 8pm. "Dr. Pimple Popper" comes back Jan 2 at 9pm, followed by "Say Yes to The Dress America" on Jan 4 at 8pm. "Sister Wives" returns Jan 5 at 10pm, "My Big Fat Fabulous Life" Jan 7 at 8pm and "I Am Jazz" on Jan 28 at 9pm.