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What the Industry Reads First

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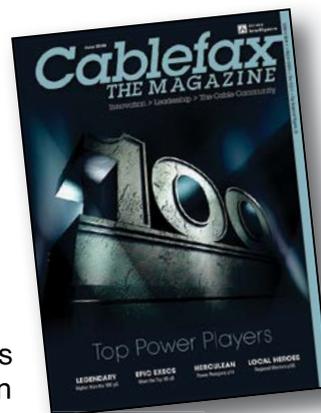
Across the Board: Content in Many Forms Dominates NATPE Miami

It's the 10th anniversary of **NATPE Miami**, and content remains king of the conference. However, the way viewers consume it has changed drastically, impacting everyone in the ecosystem. "I really assumed basic cable was really going to dominate the decade," *Adam Lewinson*, chief of content for ad-supported VOD service **Tubi**, said during a Tuesday session. "SVOD really disrupted our business and dominated the decade. Here we are in 2020, lots of SVOD competition, lots of big services launching." However, the 2020s may be shaping up to be the decade of AVOD. Tubi (which didn't exist in 2010) announced it will be launching in Mexico, marking the service's first non-English app. In partnership with **TV Azteca**, all content at launch will be Spanish-language. "There's so much potential for AVOD globally, viewers are really cost conscious everywhere across the globe," said Lewinson. "Mexico is incredibly important for us for a number of reasons. There's a great alignment with the audience in Mexico, a very young audience eager for streaming." The launch is slated for the end of 2Q20, and TV Azteca will be the lead advertising partner. Additionally, Tubi and smart TV manufacturer **Hisense** teamed up, and Hisense's platform Vidaa will be the exclusive connected TV partner in the country. Over on the SVOD side, **CuriosityStream** founder *John Hendricks* told the NATPE crowd that the non-fiction streamer has surpassed 13mln subs worldwide. The news comes just a month after the service hit 10.5mln. "This is a work in progress, this is what's been developing over the last six months," said Hendricks. A big part of CuriosityStream's sub growth came from being bundled in basic cable packages, in the US and internationally. Most notably, the SVOD scored a carriage deal with **Altice USA** that makes it available at no additional cost to all **Optimum** and **Suddenlink** video or broadband subs. While it is an SVOD, Hendricks pointed out its production costs are far lower than other programmers, allowing a lower price point for consumers (he pointed to **HBO's** \$15mln budget for the final "Game of Thrones" ep). "We want our service affordable to any family in India or Indiana. Perhaps our biggest growth will come from being packaged with cable distribution systems," Hendricks said. As for growth in the next decade? "At a low price, we're hoping our service will be in 100mln homes," he said. This explosion of streaming has also changed the game for traditional cable programmers, forcing linear nets to adjust strategy and content to meet viewers' desires and to differentiate themselves. **A&E's** series "Live PD" has delivered explosive ratings for the net, and in an era of streaming, **A+E Networks** pres *Paul Bucciari* is doubling down



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on live television. "Live Rescue" is moving from two hours to three, and Buccieri said his "dream" is to do four nights of live television. "That's a clear differentiator for us, and I think we have the talent," the exec said. "You need to really know your audiences and you need to embrace that audience." **Food Network** has found it's no longer enough to be the default network when there's nothing particular someone wants to watch. "It was this landing strip and that value of being that strip to come back to was really hugely valuable. And now in the on demand era, there's no such thing as 'there's nothing on,'" said Food pres *Courtney White*. "I think we're really transforming from being an environment to being more hit driven, where you're creating shows that agnostically can live on cable, can live on demand, can live wherever they're going to come out in coming years, but it's about finding not only hits but really moments."

Netflix Still Growing, But Not Much in the States: Netflix continued expanding its reach in Q4, adding 8.76mIn global paid subscribers and surpassing the 167mIn mark. That final push in 2019 pushed quarterly earnings up to \$5.47bIn, a \$1.27mIn increase YOY, but of those new additions, the streamer struggled to find new subscribers in the US. Netflix added only 420K subscribers domestically versus 1.75mIn adds in 4Q19. In the company's letter to shareholders, it attributed the low growth rate to its recent price changes as well as the launches of competitors like **Disney+** or **Apple TV+**, adding that it has seen "more muted impact from competitive launches outside the US." The streaming giant also announced changes to the way that it measures the popularity of content on the platform. It previously reported households viewing a title based on 70% of a single episode of a series or of an entire film, but will now transition to report on households (accounts) that chose to watch a given title. *Reed Hastings* said the method, which is similar to those used by **YouTube** or the **BBC** iPlayer, will level the playing field for all of the content types that now call Netflix home. As for the content that's winning on the platform, Netflix said "The Witcher" is tracking to be the streamer's biggest Season 1 TV series ever. Through its first four weeks of release, 76mIn members chose to watch the fantasy series.

O'Rielly OK With Compensating Satellite to Clear C-band: The debate over how a C-band auction should be conducted was reignited with the **C-Band Alliance** proposing a plan to the **FCC** last week that would require all bidders to pay accelerated clearing fees. While commish *Michael O'Rielly* has been more vocal about the need to conduct the auction in a timely manner, he also believes that in order to do so, the FCC needs to be willing to share the proceeds with the satellite providers that currently use C-band spectrum. "I do think it has to be an incentive payment that brings to those companies a willingness to participate," O'Rielly said in a meeting with reporters Tuesday. He didn't lay out any specific figures himself, but O'Rielly noted that the compensation guidelines laid out in a recent bill from Sens *John Thune* (R-SD) and *Roger Wicker* (R-MS) will have influence over the final compensation model, whether it is passed by Congress

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or not. Their amended bill, which was passed by **Senate Commerce** in December, proposes giving as much as 50% of the auction's proceeds to satellite incumbents. O'Rielly believes the final number to go towards those incumbents will fall between 30-50% of C-band auction proceeds based on filings submitted by those companies and current debate on the topic. O'Rielly still has concerns about whether the FCC can conduct an auction by the end of the year, but said that the C-band is the "easier of the hardest" bands when it comes to those he'd like to see cleared. "We have willing sellers, those willing to participate in the process and shrink their footprint," O'Rielly said. It's still possible that a proposal on the compensation issue could be added to the Commission's February open meeting agenda by FCC chmn *Ajit Pai*, O'Rielly added, and that would be a positive step towards getting the auction conducted before the end of 2020.

Peacock for Cox HSD Subs: With **Cox** on board as the first MVPD outside of **Comcast** to carry streaming offering **Peacock**, we have a few more details on who will get the ad-supported service for free. Cox will make Peacock available to any customer with expanded basic video customer or higher and to customers with any tier of internet service. Comcast also is making Peacock available to video and internet subs.

DISH's Showdown with Apollo: **DISH** lost broadcast stations in 10 markets Saturday, heading into Sunday's **NFL** conference championship matchups. The stations lost are former **Northwest Broadcasting** properties that were purchased last year by **Apollo Global Management**. An Illinois court issued a temporary restraining order that kept 14 stations that Apollo bought last year from **Cox Media Group** from going dark on **DISH**. **DISH** sought legal intervention, complaining that Apollo is attempting to nix an existing multi-year contract that was signed last March between **DISH** and the Cox stations. The former Northwest stations that are blacked out include Binghamton, NY, **Fox** affil **WICZ** and Yuma, AZ, **CBS** affil **KSWT**. Northwest stations were dark on **DirecTV** for eight months last year. All of the stations Apollo acquired now operate under the Cox Media Group name.

Dems Join Franchise Fee Fracas: Unhappy with the **FCC's** August ruling that in-kind services count towards a 5% cap on cable operators' franchise fees, Democratic senators *Ed Markey* (D-MA) and *Anna Eshoo* (D-CA) have introduced the Protecting Community Television Act. Its co-sponsors are all Dems, who have been critical of the FCC move, saying it forces local governments to choose between supporting PEG stations and other important services, such as telecom services for schools and libraries. If passed, the bill would have franchise fees that cable companies provide local governments only include monetary assessments, not in-kind contributions.

Univision Heads to Latin America: **Univision** and **Televisa** are teaming up to launch a 24-hour pay TV channel across 17 Latin American markets early this year. The Univision-branded channel will be operated by Televisa, which also will handle distribution and ad sales. The two will collaborate on programming and marketing.

ViacomCBS Entertainment & Youth Group Leadership: *Chris McCarthy* continues to round out his senior leadership team for **ViacomCBS'** Entertainment & Youth Group. *Nina Diaz*, formerly pres, entertainment for **MTV**, **VH1**, **CMT** & **Logo**, will take on the expanded role as pres, content and chief creative officer, leading creative efforts in the development and producing of all content across the portfolio as well as all casting and talent development. On Tuesday, word came that *Amy Doyle* has decided to step down as gm, **MTV**, **VH1**, **CMT** and **Logo**. "Amy and I have been working side by side for most of those 20 years. She is a trusted and talented colleague, a valued confidant and advisor and, most importantly, my great friend. I will miss her dearly as I know you will too," McCarthy wrote to staffers. As part of the McCarthy's reorg, two execs will be leaving—*Steve Albani*, svp, communications for **Comedy Central**, **Paramount Network** and **TV Land**, and *Mike Greco*, evp, content strategy and business planning for **MTV**, **VH1**, **CMT** and **Logo**. McCarthy's team includes *Keyes Hill-Edgar* in a newly created COO role. *Tanya Giles* expands her Comedy Central gm role to include head of content strategy and programming. *Jacqueline Parkes* broadens her role as CMO and head of digital studios. Other moves include *Liza Burnett Fefferman* being promoted to evp, communications; *Brianna Cayo-Cotter* serving as svp, social impact; and *Keri Panichi Flint* leading the E&Y production management group. *Josh Line*, evp, marketing & creative for Comedy Central, Paramount and TV Land, is moving to a ViacomCBS corporate role that will be announced soon.

Pac-12 Now on Vidgo: **Pac-12 Networks** signed a new distribution partnership with OTT streamer **Vidgo**. As part of the deal, Pac-12 Network will be available to all subscribers of Vidgo's Core package, which includes more than 60 channels for \$39.99/month. All seven Pac-12 Networks channels, including its six RSNs, will be included in the Vidgo Plus package, which includes over 80 channels and starts at \$49.99/month.

People: Former **Snap** exec *Cheryl Idell* was named evp, chief research officer of **WarnerMedia Entertainment & Direct-to-Consumer**. -- **Univision** alum *Mónica Talán* is heading communications for **Vrio**, the holding company for **AT&T's** DirecTV Latin America, DirecTV Go and Sky Brasil. She most recently worked for **ADT**.