

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Have it Your Way: Charter to Create IP Content Aggregation Platform

Charter isn't abandoning video, and CFO *Chris Winfrey* revealed Friday that the company will debut its own hardware-based IP platform similar to **Comcast's** Xfinity Flex at some point in the future. He said it is all part of the company's quest to maintain its position as a content aggregator.

"The integration of SVOD and even DTC platforms into our Spectrum guide, you'll see more and more of that... I still believe that cable, as an industry, has the best set of assets to continue to be the best aggregator of video content. That has always been our role," he said at an investor conference. "We've also said that maintaining a competitive video product is really important for our internet additions and our internet retention, any type of connectivity service that we provide. The past year has really proved that out."

When Charter announced its 3Q20 numbers, it revealed that it had gained video customers for the second consecutive quarter. The MVPD reported a gain of 53K residential video customers in 3Q20 versus a loss of 77K in the prior year period. "Does that continue? Probably not. It was a unique point in time, but it actually proves what we've been saying all along, that having a competitive video product helps out your internet," Winfrey said.

Charter's broadband numbers haven't been too shabby either, with the MVPD adding 537K internet customers in 3Q20. The provider is currently seeing an 8.8% internet growth rate YOY,

but Winfrey doesn't believe that rate will continue into next year. Going into 2021, he encouraged the investment community to look at 2020 as something of an anomaly. "To set the table right, 2020 unit net adds isn't the right comparison. It really should be 2019," he said.

And while Winfrey acknowledged that there is some truth to the theory that 5G fixed wireless providers like **Verizon** and **T-Mobile** have the potential to take share from cable providers, he believes cable's long-term strategies will ward off that threat.

"If we stood still and didn't invest in our network and we didn't develop it... I think the fear that 5G fixed wireless could pick us off in certain areas is real, even if it was only at the edge," Winfrey said. "The reality though is that we've always invested in our network. This concept of a wireless threat isn't new... WiFi was going to eat our lunch. We are WiFi."

Charter CEO *Tom Rutledge* echoed Winfrey's sentiments during **Liberty Global's** Friday investor meeting, arguing that while there are wireless and overbuild technologies that can replicate Charter's abilities, those are generally more expensive than it would cost Charter to upgrade its products and speeds.

Liberty Global chmn *John Malone* also isn't a believer in the prospects of 5G fixed wireless. While it may have looked really great in a lab environment, he said the technology hasn't yet proven itself to be successful in the field.

"There are some real issues in terms of reliability of service with wireless connectivity as well as the capacity issues

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that Tom referred to, so I think we'll wait and see. I know a lot of the early experiments with fixed wireless really didn't have enough capacity at the end of the day to be seriously deployed," Malone said. "It's pretty hard to impact somebody who has already got a facility in place that's so easily expanded that is so easily expanded in its capacity at low incremental cost."

MALONE ON CABLE VERTICAL INTEGRATION

AT&T has **HBO Max**, **Comcast NBCUniversal** has **Peacock** and more folks than ever before are trying to get a piece of the streaming pie. But **Liberty Global** chmn *John Malone* isn't convinced that cable operators have much to gain with these vertical integrations of content platforms. "It's all about scale, and entertainment programming has gone global. **Charter** or **Comcast** with 30% footprint in the US, and maybe 60% market share in that footprint represents a very small slice of global scale," he said during Liberty Global's investor meeting Friday. "So the players that are putting out platforms that have global footprints and are achieving global scale, their economics are going to be dominant. It's very difficult for a cable company that is limited to a subset of a national footprint to have enough scale to play in global programming, global content, where the globality is the driving economic reality."

UNIVERSAL ELECTRONICS DEBUTS APPLE TV REMOTE

For those that have both cable and Apple TV, get ready! Universal Electronics is introducing a remote control for Apple TV specifically designed to meet the needs of cable, satellite, IPTV and other MVPDs. Available starting next year, the company said the remote will specifically enhance the live TV experience

with Apple TV 4K available through MVPDs, including instant EPG access and channel buttons.

ANOTHER FILM SKIPS THEATERS

Amazon Prime scored the rights to "Coming 2 America," the sequel to the 1988 comedy starring *Eddie Murphy*. **Paramount** had originally set the film for a holiday theatrical release, and instead the film will skip theaters in the US and launch on Amazon Prime globally on March 5, 2021. This makes the latest in a string of movies forgoing theatrical releases. On Thursday, **Warner Bros** announced "Wonder Woman 1984" will debut on **HBO Max** on Christmas Day, with a limited theatrical release.

SINCLAIR SIGNS SPORTS BETTING DEAL WITH BALLY'S

Sinclair and **Bally's** have entered into a long-term strategic partnership that will combine the latter's sports betting technology with Sinclair's broadcast nets, RSNs, streamer **STIRR** and more. Bally's will integrate content into the 190 television stations that Sinclair owns, operates or provides services to across its 88 markets and its sports networks. The 21 **Fox** RSN brands will also be rebranded under the Bally name. Bally's will also have premium integration opportunities across **Tennis Channel**, Stadium and STIRR. Sinclair CEO *Chris Ripley* said during the company's 3Q20 earnings call that the broadcaster continues work on a sports app that will give viewers the ability to participate in gamification activities like sports betting.

DOING GOOD

The **Nexstar Media** Charitable Foundation is donating \$5K to the Ronald McDonald House of Eastern North Carolina on

Webinar: How big data can address a multi-billion dollar problem—churn

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behalf of its WNCT 9 station. The foundation also announced it will donate \$5K to the Salvation Army Greenville Corps based in Greenville, NC.

RATINGS

WE tv's "Love After Lockup" finished its third season with record viewership, scoring its highest-rated half season in series history in total viewers and across all key demos. The second half averaged nearly 1.3Mn total viewers per episode and saw double digit percentage growth compared to the first half of the season.

DISTRIBUTION

Cinedigm will launch new female-focused streaming linear channel **MyTime Movie Network** on **The Roku Channel**. The net will have a library of films, and will also deliver a slate of over 50 original exclusive movies.

PROGRAMMING

The first College Football Playoff rankings will be exclusively revealed on **ESPN** on Nov 24 at 7pm. – **HBO Max** picked up the six-part documentary series "Inside the Life of Superstar Nicki Minaj." – **Showtime** will air the TV premiere of "1917" on Thanksgiving Day at 9pm. – **CNN** acquired the documentary feature "President in Waiting" featuring President-elect **Joe Biden**. It premieres Dec 5 at 9pm. – **Nat Geo** is launching a companion podcast to the net's new investigative series "Trafficked with Maria Van Zeller." "The Trafficked Podcast" will be available on Thursdays beginning Dec 3.

PEOPLE

Cedar Fair named *Louis Carr*, pres of media sales for **BET Networks**, to its board. Carr will serve out the remainder of *John Scott's* board term, which expires in 2022.

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Research

> The monthly weighted average data consumed by subscribers in 3Q20 was 383.8GB, up nearly 40% from 2019.

> The overall percentage of subscribers provisioned for gigabit-speed surpassed 5% for the first time, reaching 5.6%.

> The power user category trajectory remains on the rise with 8.8% of weighted average subscribers now consuming over 1TB of data/month, up 110% from 2019.

(Source: 3Q20 OpenVault Broadband Insights Report)

Quotable

"Newsmax would never become 'Trump TV.' We have always seen ourselves as an independent news agency, and we want to continue with that mission. But we are open—[Trump] is going to be a political and media force after he leaves the White House, and we would be open to talking to him about a weekly show... we would like to overtake Fox News in the next 12 months, and I think it's do-able... Newsmax is moderately conservative and we will continue to have a moderately conservative viewpoint on things—including the president."

– **Newsmax CEO Christopher Ruddy speaking to Variety on the network's direction following the 2020 election**



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