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What the Industry Reads First

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Beyond The Box: Arris CEO Sees Opportunity In Infrastructure Upgrades

When it comes to growth opportunities for **Arris**, think outside the box—the set-top box, that is. During a presentation to prospective investors at the **NASDAQ** Investor Program in London, CEO *Bruce McClelland* said the company will soon be less reliant on its Consumer Premises Equipment segment, which includes in-home video equipment. While he expects CPE will continue to be a “cash cow business that we can reinvest in other areas,” the real growth opportunity lies in its Network & Cloud segment with broadband and telecom companies poised for major infrastructure upgrades. “Over a three-to-five-year window, we think the network evolves quite a bit from where it is today to look more like a virtualized application and a physical layer further out in the node, all areas that we’re investing in and really leading the industry from a standards perspective and will be a larger portion of our business as the years go forward here,” McClelland said. **BTIG** analyst *Walter Piecyk*, who on Thursday initiated coverage on Arris with a buy rating, said the same forces weakening the outlook for the company’s set-top box business will benefit its network segment. “The industry transformation that threatens future set-top box sales is also likely to drive cable investments to increase home broadband data speeds and ready their networks to provide 5G wireless services,” Piecyk wrote. “We believe Arris is uniquely positioned to benefit from these investments.” Arris is primed to profit not only from providing equipment for network upgrades, but also from the resulting need to make corresponding changes to consumer hardware. McClelland pointed to the pending acquisition of **Ruckus Wireless**, a deal he expects will close around August, as a key growth driver for Arris in terms of wireless networking. He touted the combination of Arris’ existing leadership in home wi-fi and broadband with Ruckus’ strong position in network solutions for public access locations, hotels and businesses. Another advancement that could benefit Arris: DOCSIS 3.1. Pressed on whether the proliferation of the new standard is coming anytime soon, McClelland asserted that deployments will accelerate during the second half of this year. “We can’t build enough today to kind of keep up at this stage. So, I really think this is the tipping point year, and next year will be a considerable shift toward DOCSIS 3.1.” **Comcast** is the clubhouse leader among US cable providers in terms of rolling out DOCSIS 3.1, and **Charter** recently put out an RFP for deployment. It remains to be seen whether other large operators plan to go a similar route

TOM WOPAT **JEFF FAHEY** **PATRICIA RICHARDSON**

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or favor fiber to the home. In terms of the set-top box business, McClelland pointed to carriers' use of technologically advanced, OTT-enabled systems as differentiators in the market as a positive, citing Comcast's X1 as an example. Still, as Piecyk wrote in his analysis, "there is no way to sugarcoat the outlook for set-top boxes."

Launch Date: The **Olympic Channel**—a joint venture between the **IOC**, **USOC** and **NBCUniversal**—will launch its US cable net on July 15 in more than 35mln homes. It will be available to most subscribers of **Altice USA**, **DirecTV**, **Comcast**, **Spectrum** and **Verizon FiOS** at launch. The net will also be on virtual MVPDs, including **DirecTV Now**, **Fubo TV**, **Hulu**, **PlayStation Vue** and **YouTube TV**. Olympic Channel will take the slot of **Universal HD**.

Lifestyle: **Scripps Lifestyle Studios** will launch the **Scripps Lifestyle Experts** group, a new talent division that will include food, home and travel influencers. The influencers, many of whom are already contributors to Scripps brands, will include chef *Lazarus Lynch*, *Maria Antoinette Loggins* (**HGTV**) and travel journalist *Ryan Van Duzer*.

Cloud Cover: **Sling TV** subscribers using certain devices can now purchase 50 hours of cloud DVR storage for \$5 per month. The functionality is not available on all channels, but the service has added **Fox** channels to the mix. New features include the ability to protect specific recordings from being deleted and to sort recordings into folders.

Roku Premiere: New **DirecTV Now** customers will receive a **Roku Premiere** when they prepay for two months of service. The offer will be available in **AT&T** retail stores starting June 23.

Ratings: The U.S. men's national soccer team's 1-1 draw with Mexico on Sunday drew 2.1mln viewers on **FS1**, making it the net's most-watched World Cup Qualifier ever.

Programming: **Disney XD** on Saturday will debut **DIXP**, a daily summer programming block from 9pm-3am ET dedicated to gaming and esports. **DIXP** will feature content produced in collaboration with **ESPN**, **Disney Digital Network** and its **Maker** creators, **IGN**, **Attack Media**, **Warner Bros. Television's Blue Ribbon Content**, **Banger Films**, **ESL** and **Vice's Waypoint**. -- **History** will debut a new eight-part limited series, "American Ripper," on July 11 at 10pm ET/PT. In the series, *Jeff Mudgett* attempts to prove his theory that his great-great-grandfather, serial killer *H.H. Holmes*, was also the notorious *Jack the Ripper*. -- **FX** has changed its plans for the "American Crime Story" franchise, which debuted last year with "The People v. O.J. Simpson." "The Assassination of Gianni Versace" will now be the second installment in the series and is slated to premiere in early 2018. "Katrina," which was initially scheduled to be the second installment, will now be the third, with production on the Hurricane-focused edition scheduled to start early next year.

Viacom Distribution Execs: **Viacom** on Thursday announced a series of promotions and hires related to distribution. The company elevated *Samantha Cooper* to evp, distribution partnerships and *Deena Demasi* to evp, distribution marketing. Both will report to Viacom evp/head of distribution and business development *Tom Gorke*, and Demasi will also report to **Viacom Velocity** evp/CMO *Dario Spina*. Viacom also named *Andrew Borak* svp, distribution marketing, and *Sheri Weidner* svp, distribution partnerships. They will report to Demasi and Cooper, respectively. The company also hired **DISH** vp, programming *Josh Clark* to serve as svp, distribution partnerships, and **Credit Suisse** director of technology, media and telecommunications *Richelle Clements* to serve as svp, deal finance.

More People: **Layer3 TV** has added *Jeff Gaspin*, pres of **Primary Wave Entertainment** and former **NBC** TV chmn, to its advisory board. Gaspin developed and launched "The Apprentice" and "The Biggest Loser" at NBC, as well as "Queer Eye for the Straight Guy" as pres of **Bravo** and **Alternative Series**. -- **Fox Networks Group** promoted *Ed Davis* to chief product officer for ad sales, a new position in which he will report to FNG pres of ad revenue *Joe Marchese*. Davis previously oversaw product management for FNG's non-linear ad sales. He has also held positions with **ESPN**, **Disney** and **DirecTV**. -- **NBCUniversal** has hired *Laura Lee* to serve as evp, content, strategy & operations for digital enterprises, effective June 19. Lee joins NBCU from **Margaritaville Media** and previously spent eight years at **YouTube**. She will be responsible for strategy and growth on existing and emerging platforms.

Vegas, Baby: **Women in Cable Telecommunications** will again hold its annual luncheon during CES in 2018 after doing so for the first time this year. It will take place at the ARIA Hotel in Las Vegas on January 10. The event location previously rotated. WICT during next year's event will honor the PAR Best companies for Women in Cable.

PROGRAMMER'S PAGE

Mystery Un-Locked

When it comes to thrillers and mysteries, the Brits are on the case. And no one knows that more than **Acorn TV**, a subscription streaming service offering UK programming that has more than 500K customers. Much of Acorn's content is in the crime genre, a logical approach given that its parent company, **RLJ Entertainment**, has a 64% stake in the licensing arm of the *Agatha Christie* estate. While Acorn has its share of Christie and cozy mysteries, such as "Agatha Raisin," its upcoming premiere of **ITV's** "Loch Ness" strikes a darker note (all six eps will be released Monday). The thriller is about the search for a serial killer in a town on the shores of the famous and mythical Scotland loch. It pushes boundaries a little bit, while still retaining that "classic, British village mystery setting," says Acorn TV's programming vp *Don Klees*. "But it also has that sensibility of can you trust anyone outside of your family—or can you even trust your family sometimes? It is, for better or worse, a mindset in tune with our times." This isn't a silly tale about the supposed swamp monster Nessie, but the setting of Loch Ness is important. It gives off an eerie vibe reminiscent of "Twin Peaks" or "Broadchurch." Helping Loch Ness is its cast, which includes *Laura Fraser* ("Breaking Bad") as lead cop with *Siobhan Finneran* ("Downton Abbey") playing her partner. Klees jumped on the series based on the script alone, but is thrilled with the casting of two strong females. "Going back to 'Prime Suspect' in the 1990s, when it comes to police drama, I think the British were well ahead of the curve relative to the US in terms of presenting female investigators and being at the top of their game," he says. "You really didn't see much of that in US police dramas, and you still don't all that much." - *Amy Maclean*

Reviews: "Genius. The Last Chapter," 9pm, Tuesday, **National Geographic**. Based on action that occurred more than 70 years ago, the final chapters in Nat Geo's "Genius" still resonate. And you needn't have seen eps 1-8 to enjoy the two-part finale of this series about *Albert Einstein*. Viewers may think of North Korea while watching part I, as much of the story deals with the race between Nazi Germany and the US to construct a nuclear weapon. It's important history told well, with an unpredictable dictator, vengeful characters and spies, including polymath baseball player *Moe Berg*. The slower part 2 pivots to Einstein's final years and the cruel irony that the work of a devoted pacifist unleashed nuclear terror. This development hurt Einstein greatly, although the series ends pleasantly, if a bit contrived. With the wonderful *Geoffrey Rush* playing Einstein with appropriate irreverence, it is viewing that is difficult to resist. Nat Geo's first scripted series also might inspire viewers to learn more about Einstein, his work and times. Einstein would be happy about that. -- "Primal Screen," **Shudder**. **AMC's** streaming service Shudder begins its foray into original content with an entertaining but difficult-to-describe 21-minute film about scary movies, ventriloquism and dolls. Filmmaker *Rodney Ascher* has done a terrific job finding apposite footage and weaving an interesting narrative. - *Seth Arenstein*

Basic Cable Rankings (6/5/17-6/11/17)			
Mon-Sun Prime			
1	FOXN	1.1	2384
2	MSNB	0.8	1862
3	USA	0.6	1409
3	HGTV	0.6	1387
3	TBSC	0.6	1316
6	HIST	0.5	1168
6	CNN	0.5	1138
6	DISC	0.5	1074
9	ESPN	0.4	979
9	A&E	0.4	938
9	ID	0.4	933
9	DSNY	0.4	910
9	TNT	0.4	843
9	HALL	0.4	792
9	DSE	0.4	77
16	AMC	0.3	801
16	FOOD	0.3	778
16	TLC	0.3	756
16	NAN	0.3	722
16	FX	0.3	714
16	LIFE	0.3	690
16	ADSM	0.3	689
16	TVLD	0.3	673
16	FRFM	0.3	670
16	FS1	0.3	605
16	BRAV	0.3	585
16	VH1	0.3	567
16	HMM	0.3	555
16	NKJR	0.3	536
16	DSJR	0.3	528
16	INSP	0.3	526
16	LMN	0.3	479
33	SYFY	0.2	561
33	SPK	0.2	516
33	WETV	0.2	448
33	APL	0.2	446
33	TRAV	0.2	426
33	MTV	0.2	420
33	GSN	0.2	413
33	EN	0.2	407
33	NGC	0.2	388
33	CMT	0.2	386
33	OWN	0.2	368
33	CMDY	0.2	348

*Nielsen data, supplied by ABC/Disney, is based on coverage area of individual networks



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