

# Cablefax Daily™

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What the Industry Reads First

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## New Groove: How NCTC Members Are Keeping Up with Pay TV Trends

The final day of **NCTC** and **ACA Connects'** Independent Show was all about operations, and providers are still grappling with the question of how, or if, to continue offering video as a part of their product mix.

Comporium vp, video strategy & programming *Karl Skroban* said the biggest factor changing the video business today is programming rates. "Let's be honest—if you looked at the margins on video today, you would not get into the video business," he said.

The COVID-19 pandemic has only accelerated a number of the video market trends, including pay TV subscriber losses and the increase in broadband needs and use cases. But *Brett Sappington*, vp at consumer insights agency **Interpret**, believes that there is still hope for the video market, so long as operators are open to revamping their video playbook. An opportunity Sappington identified is for operators to strike up new partnerships with vMVPDs.

"In today's day, it's important to sell your video product, but it's really super important to sell your data product," said *Jaime Montes*, **Consolidated Communications** director, content acquisition, digital TV services and strategic partnerships. "Having a video solution like **MobiTV** is helping us tremendously. However, for those customers that don't want that type of solution from us, having something from **Philo** or something from **fubo** helps us to continue that conversation when we're talking about bundling some form of video with our data solution."

**Cincinnati Bell** director, video strategy *Jon Bond* said the app-based ecosystem should help operators see better margins on their video businesses by eliminating the capital requirements that are necessary with the legacy set-top box. Cincinnati Bell announced earlier this year that it would be using **TiVo's** IPTV platform to launch its next-gen video solution.

**Metronet** isn't shying away from the world of SVODs and AVODs, and is even preparing to give the customers the tools they need to decide what OTT options are for them. "We're working on implementing an OTT recommendation tool for both new customers as well as existing ones that want to cut the cord. To be clear, we will not hide this from our existing video customers," *Darrick Zucco*, Metronet general manager for Ohio and Kentucky said. "We really don't care if they want to cut the cord and go over-the-top."

The image is a promotional graphic for the NAMIC 34th Annual Conference. It features a background of overlapping triangles in shades of orange, yellow, and grey. In the center, there is a large orange triangle pointing right, containing the NAMIC logo. Below it, the text reads "34<sup>TH</sup> ANNUAL CONFERENCE" in a smaller font, followed by "BUILDING A LEGACY" in a large, bold, blue font, and "THE FUTURE IS NOW" in a slightly smaller blue font. At the bottom, it says "OCTOBER 6 - 9, 2020" and "REGISTER TODAY AT CONFERENCE.NAMIC.COM" in a dark blue box. There are also several small, semi-transparent images of people's faces integrated into the design.

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Metronet is also finalizing a strategy to launch a managed over-the-top box and service that will provide features like enhanced search without the linear lineup. “You can think about it in terms of **Comcast’s Flex**, but much better,” Zucco said.


**6Ghz Stay Denied:** The US Court of Appeals for the DC Circuit on Thursday denied an emergency stay request from **AT&T** and others that would prevent the **FCC’s** decision opening up the WiFi 6Ghz band to unlicensed serviced from taking effect. The FCC unanimously voted in April to make the 1200MHz of spectrum sitting in the 6GHz band available for unlicensed use—a move cable operators had long advocated for. The parties have 30 days to submit a proposed format for briefing the cases, with the court urging them to submit a joint proposal.

**Edwards Departing CommScope:** **CommScope** pres/CEO *Eddie Edwards* stepped down Thursday after 15 years at the company. His successor is *Chuck Treadway*. Treadway has served 17 of the last 20 years as CEO of global businesses in the US, China and Latin America. Most recently, he served as CEO of **Accudyne Industries**. **CommScope** also announced that **CommScope** founder *Frank Drendel* has been named Chairman Emeritus. Since the company’s founding in 1976, Drendel has continuously served as its CEO and/or board chmn. Drendel will remain on the board, and has been succeeded as chmn by *Bud Watts*, who will become a **CommScope** employee.

**More Jump in on California’s Net Neutrality Battle:** **Public Knowledge, Access Now, Free Press, Mozilla** and **New America’s Open Technology Institute** filed an amicus brief at the US District Court for the Eastern District of California in the federal government’s case against the state’s net neutrality law. In the filing, the groups argue that the **US Chamber of Commerce** has falsely claimed that broadband investment declined in 2015 and 2016, when the **FCC’s** Title II-based net neutrality rules were still in place. They also claim the Chamber of Commerce is incorrect in its determination that investment rebounded in 2017 and 2018 following the FCC’s elimination of its net neutrality rules. The brief also argued that ISPs have a history of undermining net neutrality.

**DISH Retrans Watch:** **DISH** and **Cox Media**-owned stations in 10 markets, including Syracuse, NY; Yuma, AZ; and Greenville, MS, reached an extension that kept stations on Thursday evening. **DISH** first lost the stations in mid-January, but the two set aside their retrans dispute in March due to the pandemic. A court order kept some **Cox Media** Group stations in 10 other markets on, but they went dark July 22 after that temporary restraining order expired. The two have ongoing litigation about whether **DISH’s** carriage agreement for the **Cox** stations was prematurely terminated when **Apollo** acquired the stations late last year.

**fuboTV Going Public:** **fuboTV** announced the launch of its public offering of 15mln shares of common stock. It is cur-



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rently expected to be between \$9-\$11 per share, listed on the NYSE the day after pricing under the ticker symbol FUBO.

**Mississippi PSC Wants FCC Audit of AT&T:** The **Mississippi Public Service Commission** has requested that the **FCC** perform a full compliance audit of **AT&T Mississippi** regarding the company's claims of providing service to over 133K locations as part of their Connect America Fund Phase II obligations. "As a part of our annual certification of Eligible Telecommunications Carriers, evidence has been uncovered by our agency that leads to great concern surrounding the validity of AT&T Mississippi's claims and the honesty of data submitted by them to the Universal Service Administrative Company's High Cost Universal Broadband," the PSC wrote in a letter to the FCC this week. AT&T said the data it reports as part of Connect America Fund Phase II is already subject to strict audit and compliance measures by the federal government. "We will continue to focus on doing work that matters to Mississippians by deploying high-speed infrastructure in communities across the state," an AT&T spokesperson said.

**MoffettNathanson Ups Disney Price Target:** **MoffettNathanson** raised its **Disney** price target by \$18 to \$136, citing the company's successful direct-to-consumer efforts. In a note, it said that Disney's DTC businesses have already meaningfully outperformed their initial subscriber expectations. "We anticipate **Disney+** domestic subs will grow to over 50 million by 2024. Yet the real upside is outside the US, which is set to accelerate thanks to success at Disney+ Hotstar in India," **MoffettNathanson** said. "We now forecast Disney+ to reach nearly 160 million subs worldwide by 2024."

**Viamedia, Service Electric Cablevision Renew:** **Viamedia** and **Service Electric Cablevision** renewed their long-term agreement to continue running ad sales for the company's video ad services across the Philadelphia and Wilkes Barre markets across more than 100K homes. The two have been partners for approximately two decades.

**Charter Offers Power Outage Protections:** **Charter** launched wireless internet backup for Spectrum Business customers across the company's 41-state footprint Thursday. Available as an add-on solution for all standard Spectrum Business internet speeds, wireless internet backup provides a redundant LTE connection, protecting against disruptions in internet connectivity that can happen during power outages. The service uses the LTE connection of whichever wireless provider delivers the best signal strength at the customer location. It's not related to Charter's MVNO agreement with **Verizon**.

**Comcast Revamps xFi Extenders:** **Comcast** released a new xFi Pod to its Xfinity internet customers. The second generation boasts speeds two times faster than those provided by the initial offering, upwards of 500Mbps. Since March, Comcast said it has seen the demand for the xFi Pods double as families are trying to ensure WiFi reaches every corner of their homes. The new xFi Pods are available in a one-pack for \$119 or in a two-pack for \$199.

**Time to Text:** Cloud communications platform provider **Alianza** has acquired **Message Hopper**, a software company offering a cloud-native SMS solution for businesses. Message Hopper's business text messaging applications helps businesses connect with their customers using SMS and MMS. Alianza is actively integrating Message Hopper's platform into its existing portfolio of business communication products.

**Ratings:** **NBCSN** delivered record 3Q primetime ratings, led by the NHL Stanley Cup Playoffs. The games were played in August and September for the first time due to the coronavirus pandemic. The net averaged 506K primetime viewers, more than double last year's audience and beating the prior 3Q record by 11%. The net also posted its best total day quarter in any non-Olympics quarter, averaging 200K, up 37% YOY. -- It wasn't just the big news nets that saw a bump from Tuesday's debate. **Spectrum News'** coverage of the first presidential debate earned a 433% increase in household ratings, the highest increase compared to local broadcast and cable nets across eight Spectrum metered markets.

**Distribution:** **AMC Networks** is expanding distribution of its **AMC+** subscription bundle. Beginning Thursday, **AMC+** is now available through **Prime Video** channels and **Apple TV** channels. All seven seasons of AMC's "Mad Men" just launched on the premium subscription service. -- **Verizon Fios** is expanding its Spanish-language VOD content for no additional cost. Through agreements with providers in Spain and throughout Latin America, customers can now gain more than 400 hours of VOD content in Spanish.

**Programming:** **Showtime** ordered a sixth season of drama series "Billions." Season 5 will return with five new episodes in 2021. The net will also offer the premiere episode of new series "The Good Lord Bird" for free beginning Oct 4 at midnight. The series premieres Sunday at 9pm. -- **ESPN's** coverage of the WNBA Finals kicks off Friday at 7pm on **ESPN2** for Game in a best-of-five series. Games will broadcast across **ABC**, **ESPN** and **ESPN2**. -- **INSP** will commemorate Veteran's Day with special airings of military epics "To Hell and Back" (8pm, 12:30am) and "Operation Pacific" (10pm).

**People:** **WOW!** named *Andrew Posen* vp, head of investor relations. Posen previously held similar roles at video management software company **Telaria** and **AppNexus**.

# PROGRAMMER'S PAGE

## OWN Digital Series – Smart, Short & Sincere

**OWN: Oprah Winfrey Network** is taking the plunge into animation with, “Sincerely, Camille.” The six-part, short-form comedy series is a first for the net and a component of its “OWN Your Vote” initiative. Created by *Munirah Safiyah Jones* (“Junt Land”), Sincerely, Camille follows three female friends in the midst of the 2020 presidential election cycle—serving up an informative (and sometimes poignant) take on politics and the issues impacting Black women with a side of humor. While there are plenty of celebs imploring people to vote, Jones isn’t sure that resonates with a lot of people. “We were trying to approach it in a different way—trying to create some relatable, funny, smart sketches centered around Black women because we know if no one else gets out and vote, Black women will get out and vote,” said Jones, who serves as executive producers and voices some characters. “That is OWN’s audience, and it’s also the best audience for this show because we get things done.” OWN pres *Tina Perry* is a fan of Jones’ web animated series *Junt Land*, and reached out as the network was putting together its voter registration campaign. “It’s political meets entertainment,” Perry said of the series. And what’s especially important to her is that Sincerely, Camille showcases the role you can play right now. “I think you see it with Camille—the way she’s sparking conversation. She organized her voter registration drive. She’s challenging people on the things they say—politely and elegantly, but she is. And you can do that too,” said Perry. “There are 16 million Black women who should be voting this year and going to the polls. We want them to get some family and friends out to in their community.” The first two episodes dropped Tuesday on Twitter and are also available across OWN’s digital platforms as well as the Watch OWN app. New eps, approximately five minutes each, will roll out twice weekly leading up to Election Day. – *Amy Maclean*

**Reviews:** “Frontline: America’s Medical Supply Crisis,” Tuesday, **PBS** (check local listings). We’ve wondered in this column often whether viewers want to use TV to escape, momentarily, the pandemic, or delve deeper. Regardless, inquisitive viewers will get much from this excellent look at how and why the US, once the world’s capital of facemasks, was caught short of this and other medical equipment when the pandemic reached these shores in March. From a distance, Frontline’s investigation is fascinating. Unfortunately, the wound is too raw for viewers to react with fascination to the subject of this well-told short film. -- “Borgen,” streaming on **Netflix**. A hit in Europe and later here, this 3-season series revolves around journalists and politicians in Copenhagen. Purists, including your reviewer, blanch at the dubbed version of Seasons 1 and 2 that Netflix offers (Season 3, thankfully, has subtitles only). On the other hand, it’s amusing to activate on-screen captions and compare it to the dubbed language. The dubbed version is bluer. Both are enjoyable. -- Notable: “First Ladies,” premiere, 10pm, Sunday, **CNN**. You know the old saying, ‘Behind every successful man, is...a disbelieving mother-in-law.’ Seriously, this amusing six-parter on the presidents’ better halves begins with an enjoyable look at *Michelle Obama*. – *Seth Arenstein*

Basic Cable P2+ Prime Rankings* (09/21/20-09/27/20)		
Mon-Sun	MC	MC
	US	US AA
	AA%	(000)
FNC	1.211	3,730
ESPN	1.148	3,534
MSNBC	0.631	1,945
TNT	0.579	1,784
CNN	0.389	1,198
HGTV	0.382	1,178
HALL	0.318	980
TLC	0.313	965
TBSC	0.297	916
NFL	0.267	822
FOOD	0.246	758
USA	0.216	664
NBSCN	0.211	650
DISC	0.211	650
ID	0.207	637
HIST	0.190	587
HMM	0.189	583
INSP	0.173	533
FX	0.166	511
TVLAND	0.166	510
A&E	0.163	503
FRFM	0.158	486
ADSM	0.151	466
LIFE	0.147	453
NICK	0.147	453
NAN	0.141	434
BRAVO	0.141	434
APL	0.135	415
WETV	0.127	390
SYFY	0.120	371
AMC	0.120	370
GSN	0.117	359
NATGEO	0.115	356
TRAVEL	0.114	352
BET	0.104	319
DSNY	0.099	304
E!	0.098	302
MTV	0.096	296
OXY	0.092	284
HBO	0.090	278
NKJR	0.085	262

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

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– David Atman, President, Lindsay Broadband



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