

# Cablefax Daily™

Tuesday — October 13, 2020

What the Industry Reads First

Volume 31 / No. 198

## Expo Day 1: Cable's Roadmap Beyond the Pandemic

The leaders of **Comcast**, **Charter** and **Liberty Global** gathered during **Cable-Tec Expo's** general session Monday to discuss how the COVID-19 pandemic has affected the cable industry so far, and how the global event has changed their respective business plans.

"Our people met the moment," **Comcast Cable** pres/CEO *Dave Watson* said during Monday's CEO panel. "The network teams were just incredible in how they deployed tools and worked with customers in trying times." He added that while various AI and network management tools were helpful, investments like the \$12bln Comcast has spent expanding network's capacity over the last three years were absolutely critical to its performance during the pandemic. Watson is also leading Comcast towards 10G and is currently testing advanced speeds. "The foundation that we have is one of strength," he said. "I really think with the constant investments that we've made and the standard of [DOCSIS] 3.1, we really do have the most resilient, efficient, effective network right now."

The capabilities of DOCSIS 4.0 and the 10G platform were put on display during Expo's opening session. The latest in ray-tracing tools and light field capture technology were used to create holographic content. Charter collaborated with San Francisco-based **Visby** on the holographic experience, which was transmitted over an end-to-end multi-gigabit network, operating at single-digit millisecond latency. The entire experience was based on next-generation cable architecture, combining a Charter-developed advanced edge compute cluster with a **CommScope**-provided 10G-capable HFC network, including home wireless delivery with the latest Wi-Fi 6E connection.

Charter chmn/CEO *Tom Rutledge* also credited the deployment of DOCSIS 3.1 as an investment that paid off. It allowed the company to have significant capacity across much of its footprint, but Rutledge said there were still areas that required additional work to unlock the needed capacity. Charter sent out additional DOCSIS 3.1 modems that could take full advantage of the spectrum used by the platform and augmented the size of certain nodes. "The bigger story is that most of the network had capacity available," Rutledge said. "As an industry, we rose to the occasion and were able to function in a highly-successful way, and not only meet the needs of our customers, but meet the needs of the community."

We are so proud of our industry and the many ways companies are responding to the pandemic. Free internet, fresh content, employee safety and much more.

The Cablefax Editorial Team is reporting on vital industry updates every day. We want to hear from you so please reach out to share your news and stories.

**Content. Community. Daily.**

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**The Collapse of Theatrical Windows?:** With theaters shuttering, will day-and-date releases become a thing? **Universal Pictures** is the first out of the gate, announcing "Trolls World Tour" will be available April 10 for a rental. Other in-release movie titles are set to be available as soon as this Friday. The movies will be available on **Comcast**, **Sky** and a "broad range of on-demand partners." Titles to be made available include "The Man" and "Emma" with a suggested retail price of \$19.99 in the US.

Tuesday — March 17, 2020

What the Industry Reads First

Volume

**For Now: Providers Set Aside Disputes During Coronavirus Outbreak**

As they face the common enemy that is the coronavirus pandemic, **Cox Media Group** and **DISH** have set aside their retrans dispute for now so that **DISH** can resume its carriage of 10 CMG stations in New York, Oregon, Washington, Arizona, Louisiana, California, Mississippi and Idaho. No word on how long the truce will last.

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Friday — March 13, 2020

What the Industry Reads First

Volume 31 / No. 050

**New Normal: Companies Roll Out Contingency Plans in Face of Covid-19**

With a growing number of students and employees working from home, it's mission critical for the nation's broadband providers during the Covid-19 pandemic. Operators big and small are up-ending their day-to-day operations to ensure service to their customers.

Wednesday — March 18, 2020

What the Industry Reads First

**Covering Covid-19: Content Companies Step Up Efforts**

Programmers are shuffling schedules to respond to the coronavirus crisis. **The Weather Channel** is airing live programming at 50 minutes past the hour to share educational content. **Netflix** is airing live programming due to school closures. Topics include why thunder happens, how rainbows form and more. Programming is scheduled for Friday at 2pm.

**From the Commission:** Another 116 broadband and telephone service providers have taken the **Partners Keep Americans Connected Pledge**, agreeing to take specific steps to keep Americans connected for 60 days. Some notable names taking the pledge include **Hotwire Communications**, **Midwest**

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And while many are continuing to work and learn at home for the time being, Rutledge believes that the world will return back to normal, in many ways, after the pandemic. “This too will pass. We’re human beings, we’re social animals, and there’s a lot to be said for being together and collaborating together,” he said. “I expect the world socially to revert to the way it has always been.”

Across the ocean in Europe, **Liberty Global** saw similar trends to US operators. “We had a bigger uptick in six weeks than we had seen in six years on the upstream,” Liberty Global CEO/vice chmn *Mike Fries* said. Post-pandemic, Liberty Global is looking at accelerating its new builds as well as its transition to IP video. “When you can build a low-cost app-centric device that will serve the needs of both existing customers and future customers you don’t have, given the streaming world we’re in, it makes a lot of sense,” Fries said.

Rather than expose weaknesses in the network, Fries said the pandemic has put a bright light on everything that cable has done right. “It’s more about validating things we’ve done,” Fries said. “This industry has amazing fortitude. Don’t ever count us out or second-guess our ability to rise to the moment.”

**Disney Reorg:** **Disney** announced a major restructuring of its media and entertainment divisions on Monday, aiming to put **Disney+** in the middle of the company’s operations and further accelerate its DTC strategy. Disney is centralizing its media businesses into a single org responsible for all monetization of content, both distribution and ad sales, and will oversee streaming services. *Kareem Daniel*, former pres of consumer products, games, and publishing, will head up the new global Media and Entertainment Distribution unit. Content creation will be managed in three distinct groups: studios, general entertainment and sports, led by current leaders *Alan Horn* and *Alan Bergman*, *Peter Rice*, and *Jimmy Pitaro*. The parks, experiences and products group will continue to operate under its existing structure. “Given the incredible success of Disney+ and our plans to accelerate our direct-to-consumer business, we are strategically positioning our Company to more effectively support our growth strategy and increase shareholder value,” said CEO *Bob Chapek*. Disney also set a virtual investor day for Dec 10. Disney stock jumped up over 5% in after-hours trading.

**NBCU Personnel Changes:** **NBCUniversal** upped *Linda Yaccarino* to chmn, global advertising and partnerships. She’ll continue to oversee all national advertising sales, ad sales marketing and global partnerships, and will now add local advertising sales and strategic initiatives to her purview. She’ll also spearhead a new cross-functional data strategy effort across the company. In related NBCU news, *Meredith Ahr* has exited the company as head of unscripted TV after an investigation into a toxic work environment. She follows former NBC Entertainment chmn *Paul*

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Teledgy's departure in August. First reported by *The Hollywood Reporter*, Ahr's last day was Monday.

**Cable-Tec Expo Has Hart in the ATL:** SCTE-ISBE tapped Cox evp, chief product and technology officer **Kevin Hart** as the program chair for next year's Cable-Tec Expo. Expo is set to take place live Oct 11-14 in Atlanta at the Georgia World Congress Center. It will mark the third time Hart has served as program chair for the largest cable industry event in the Americas. While organizers made this Expo free and virtual, they're hoping to return to an in-person event next fall. However, organizers said more virtual opportunities are likely to be incorporated into the conference going forward.

**Record Local Ad Spend:** Comcast's FreeWheel reported that agencies using its Strata Platform's ePort broke spend records in orders sent to local broadcasters and rep firms in September. This is the first time in ePort's 13-year history it processed such a large scale of orders in a single month, something that FreeWheel says points to the increasing importance of automation and growth of local TV ad spend. Since early spring, proprietary FreeWheel data showed record increases in viewership, including a 32% jump in ad views. "However, advertising budgets were in decline as brands and agencies struggled with the pandemic," said *Michael McHugh*, vp, media eBusiness at FreeWheel. "Our latest data is a clear sign that these trends are reversing—and local advertising is coming back into balance. Consumers are increasingly turning to local programming to find out what's happening in their communities, and the advertisers are following."

**GCI Liberty Offers \$600mln in Notes:** GCI Liberty's subsidiary GCI completed its previously announced sale to initial purchasers in a private offering of \$600mln aggregate principal amount of new 4.75% senior notes due in 2028. The company will use the net proceeds of the offering, alongside cash on hand and proceeds from expected incremental borrowings, to fund the redemption of all \$450mln aggregate outstanding principal amount of GCI's 6.875% senior notes due 2025 and the redemption of all \$325mln aggregate outstanding principal amount of GCI's 6.625% senior notes due 2024.

**Harmonic Introduces Gigabit Upstream Solution:** Harmonic is launching a new tech that will allow cable operators to provide new two-way gigabit services. The upstream solution is full spectrum and compatible with already-deployed cable modems and set-top boxes. Comcast is the first cable operator to conduct a field trial of the tech.

**Fox Sports, Samsung Launch MLB Smartphone Experience:** Fox Sports and Samsung teamed up for an exclusive 5G bonus app experience for 5G enabled smartphones for Fox Sports' MLB postseason coverage. The app includes an interactive video-player, multi-view feature, updated highlights and the ability to rewind.

**Doing Good:** The Alliance for Women in Media Foundation and ESPN teamed up for a new joint scholarship working to provide Black women a path into careers in sports media. ESPN's \$10K donation will provide for two educational scholarships, one graduate and one undergrad.

**On the Circuit:** The Media Institute will honor Comcast senior evp *David Cohen* and former FCC commish *Mignon Clyburn* at its annual "Free Speech America" event on Oct 14 at 8pm, taking place virtually. Cohen will receive the American Horizon Award for his efforts spearheading Comcast's Internet Essentials program, and Clyburn will receive the Freedom of Speech Award for her efforts to promote free speech by making broadband and technology accessible to everyone.

**Programming:** History Channel greenlit nonfiction series "Great Escapes with Morgan Freeman" (wt). The six one-hour episodes will dive into some of history's greatest convict escapes. -- "Bargain Mansions" is returning to HGTV on Nov 9 at 9pm. -- Season 2 of "His Dark Materials" will debut on HBO on Nov 16 at 9pm. The series will also be available to stream on HBO Max. -- Showtime ordered a new comedy series "Flatbush Misdemeanors," starring two comedians living in Flatbush, Brooklyn. -- Discovery Family will debut a new animated series "My Little Pony: Pony Life" on Nov 7 at 11:30am. -- Disney Channel greenlit a sibling superhero comedy series "Hamster & Gretel" from the co-creator of "Phineas and Ferb."

**People:** Comcast CFO *Michael Cavanagh* will retire from the board of Yum! Brands, which operates the KFC, Pizza Hut and Taco Bell brands. He joined the board in 2012.

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