

# Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

## Lean In: The Strength of AVOD

The pandemic has accelerated streaming more than anyone could've predicted in the beginning of the year, and AVOD has been riding the wave. **Xumo** was acquired by **Comcast** at the end of February, and has now seen a 2.5x increase in monthly active uniques during COVID-19, coming in at just under 27mln users.

"We were doing well [before], but being tied to a larger company has been really beneficial," said *Bill Condon*, svp of advertising partnerships at Xumo, speaking during a recent panel on OTT advertising. Condon pointed to four benefits the Comcast acquisition brought Xumo: distribution, discoverability, content and data. The company's content acquisition budget increased by 350%, with Condon pointing to a similar pattern with **Fox** and **Tubi**. He also noted that Xumo was acquired by Comcast under its video distribution business, and not **NBCU**, providing a mutually beneficial relationship for the two.

"They're a distribution platform and so are we. There's some overlap in some of the Comcast markets, but it's a great opportunity for outside those markets for Comcast to have access," he said.

And it's not just Xumo that's benefitting. *Justin Gutschmidt*, head of national sales at **Premion**, an OTT/CTV ad platform, noted that the acquisitions of Xumo, **Pluto TV** and **Tubi** all increased credibility for the platforms. "Where many of the linear buyers had pushed back originally" with such platforms, "the credibility that each of those platforms received by acquisitions from Comcast and **ViacomCBS** and Fox have given every one of those

traditional buyers the sense that 'wait a minute, these guys are in a whole different league now,'" said Gutschmidt. "They have an understanding of credible content and brand safe content that didn't always exist early on."

And over at ViacomCBS, CEO *Bob Bakish* said he "couldn't be happier" with the company's decision to purchase Pluto in 2019. "It's an amazing asset and it's grown even faster than we had hoped, let alone planned, at the time," said Bakish during the company's 3Q earnings call last week. "We quickly talked about it being a long-term opportunity in having a billion dollars in revenue, I think people thought we were crazy when we said that. Given the growth we've experienced since then, our ambitions have actually grown."

Pluto TV had a good quarter, growing its domestic monthly active users to 28.4mln, up 57% YOY and more than doubled its advertising revenue in 3Q.

SVOD has also seen a bump from the success of AVOD, according to **Acorn TV** gm *Matthew Graham*, who also spoke at the MediaRadar panel on OTT. Though he said **AMC Networks** isn't looking into offering an AVOD tier of any of its SVODs, the growth of AVOD has benefitted the marketplace in general. "SVOD was starting to collapse a few years ago. There were a bunch of big services that shuttered after a couple years. People weren't quite getting the formula right—they didn't have the right audiences, they didn't have the right content model, the right pricing model," said Graham. "AVOD sort of brought a lot of energy back and a lot of opportunity back into the OTT world, which is great."



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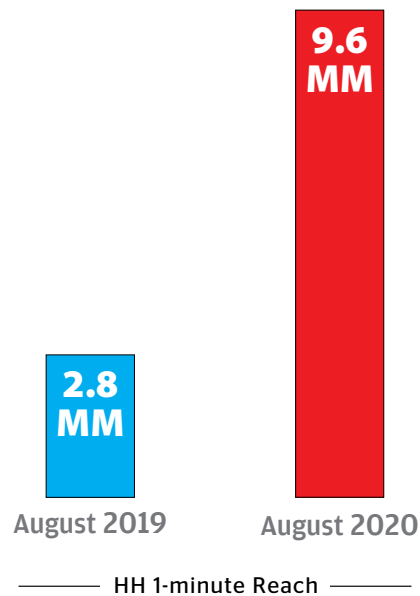
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We've already surpassed many well-known cable TV brands — like NFL Network, GAC, Discovery Life, Bloomberg, RFD,

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SOURCE: Comscore Television Essentials, HH 1 Minute Unduplicated Reach - broadcast months August 2019 (7/29/19 - 8/25/19) vs. August 2020 (7/27/20-8/30/20); M-Su/6a-6a Live SD used in analysis Nielsen Media Research; Persons 2+ Live SD (000) used in analysis for daypart growth - Week of 10/5/20 vs. 3Q20 T.P. averages (6/29/20-9/27/20)

DISH TAPS QUALCOMM FOR 5G

DISH announced the latest partner that has signed on to help it fast track the rollout of its Open RAN 5G network. Qualcomm and DISH are collaborating to test open and virtualized RAN 5G solutions containing the former's 5G RAN platforms. The platforms are designed to allow emerging network vendors to accelerate deployment and commercialization of vRAN and interoperable networks that can deliver on the use cases for 5G. "With this move, Qualcomm Technologies will also enrich a diverse ecosystem of RAN applications by delivering data insights natively through the future chipset family," DISH evp/chief network officer Marc Rouanne said in a statement. "These insights are the foundation of our data-centric and fully-automated network architecture."

VETERANS DAY

Operators and programmers across the country are recognizing, remembering and celebrating veterans on Veterans Day and during November, National Veterans and Families Month. Across the country, nearly 50K National Guard and reserve service members have been called up to help fight the COVID-19 pandemic, including more than two dozen Comcast NBCUniversal employees. On the NBCU side, its advertising & partnership division and Comcast Military & Veterans Affairs announced a new Veterans Residency Program designed for mid-to-senior level veterans who face challenges getting opportunities in the civilian workforce. Beginning next year, the partnership will allow two members of the military community exposure to all aspects of the advertising & partnership business, with the opportunity for full-time employment.

That's in addition to the entry level NBCU Ad Sales Associates program, launched several years ago. Charter continues its commitment to hiring veterans, with approximately 10% of its workforce made up of former military members. During the pandemic, Charter increased the use of its virtual recruitment tools, participating in military-focused career fairs. Throughout November on Spectrum on Demand, customers can find a list of films focused on military stories. ESPN has a week of Veterans Day recognition initiatives, taking place Nov 7-14. Highlights include a week of "First Take," visiting active bases, and five days of military-related features in "SportsCenter" and other programs. A+E Networks announced a slate of corporate and social responsibility initiatives across its portfolio. History Channel will debut a one-hour special "Variety's Salute to Service" on Wednesday at 11pm. A+E Networks is also providing a grant to Volunteers of America-Greater New York to help facilitate enhancements to the East 119th Street Veterans Residence in New York City.

ELECTION NIGHT AT HULU

November 3 broke records on Hulu and ranked as the most-watched event ever on Hulu + Live TV, with more than 65% of subscribers tuning in. Hulu opened up live election night coverage to its Hulu on-demand subscribers via ABC News Live. After doing so, 70% of Hulu's total election night viewers were Hulu + Live TV subs, while 30% were viewers of other plans. Throughout the week following election night, Hulu saw nearly 5mln subs tuning in to live news, watching for over 7 hours on average. Viewers from Pennsylvania and Georgia were the most engaged, watching for an average of nearly 8 hours.

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**NEW DISNEY ENTERTAINMENT STRUCTURE**

Following last month's restructuring of **Disney's** media and entertainment businesses, *Peter Rice*, chmn of general entertainment, announced the structure of his division. Changes include a new direct report in **Nat Geo** head *Courteney Monroe*, whose title is changing to pres, National Geographic Content. *Gary Marsh*, previous pres, **Disney Channels**, is getting expanded responsibility that now includes all Disney-branded content for kids, tweens, teens and families, meaning the **Disney+** unscripted content and production teams join the Disney General Entertainment Content (DGE). *Dana Walden's* title changes to chmn, entertainment, Walt Disney Television, overseeing development and production operations of Disney Television Studios, **Hulu** Originals, **ABC** Entertainment and **Freeform**.

**CANOE'S LINEAR ADDRESSABLE CAMPAIGN**

**Canoe's** first multi-distributor, linear addressable TV campaign has been launched as part of the "On Addressability" initiative. **AMC** launched its campaign across the **Comcast** and **Charter** TV footprints, becoming the largest deployment in the industry to date. The initiative was founded by Comcast Advertising, **Cox** Media and Charter's Spectrum Reach and is working to accelerate the industry's ability to deliver a scalable and sustainable addressable solution.

**T-MOBILE WIDENING INTERNET PILOT**

**T-Mobile** is expanding its \$50/month home internet pilot service to more than 130 additional cities and towns across Michigan, Minnesota, New York, North Dakota, Ohio, Pennsylvania, South Dakota, West Virginia and Wisconsin. T-Mobile plans to launch commercial 5G home internet service next year.

**VENN SCORES MICROSOFT SYNDICATION DEAL**

**VENN**, the streaming network dedicated to gaming, has signed a content syndication deal with **Microsoft's** MSN. Under the non-exclusive partnership, clips from Venn's series like "The Download" and "Guest House" will be shared on MSN ESports, a new part of Microsoft's content ecosystem. The deal follows the closing of VENN's \$26mIn Series A round, which was co-led by **BITKRAFT** and new partner **Nexstar**.

**LUCAS ELECTED TO CABLE CENTER BOARD**

The **Cable Center's** board has elected **Crown Media Family Networks** pres/CEO *Wonya Lucas* as its newest board member. She will serve a two-year term on the board, joining the Class of 2022. Board members that have been re-elected to another three-year term include **Advance's** *Nomi Bergman*, **Media-Max Advisors' Paul Maxwell, former **Arris** executive chmn *Robert Stanzione*, **NCTA's** *Dane Snowden*, **Discovery's** *David Zaslav*, **CNN's** *Jeff Zucker* and **Charter's** *Jay Rolls*. Executive Committee members re-elected to another one-year term include **Penthera Partners' Michael Willner**, **Archtop Capital Management's** *Jeffrey DeMond*, **Balfour Associates' David Van Valkenburg**, **Cequel III's** *Jerald Kent*, The Cable Center's *Jana Henthorn*, **Baker Media's** *Bridget Baker*, **A+E Networks' Nick Davatzes** and**

**CableLabs' Chris Lammers**.

**TDS BUILDS ON 1 GIG OFFERING**

**TDS** is now offering 1 Gig internet speeds in Mesquite and Bunkerville, Nevada. The higher speed packages will be available to residential and business customers.

**MICROSOFT KICKS OFF BROADBAND CHALLENGE**

**Microsoft** and the **Open Data Institute** launched an Education Open Data Challenge Tuesday designed to shine a light on the relationship between broadband access and K-12 education outcomes. Participating teams will be asked to identify gaps in digital infrastructure that affect the delivery of education services online and suggest realistic solutions to address those gaps in a cost-efficient way. They will have four months to complete the challenge from the opening date and receive access to tools and resources from Microsoft, the ODI and **BroadbandNow**.

**DISTRIBUTION**

**Insight TV** teamed up with **Huawei** to launch both the net and its short-form content channel InShort in 11 countries across Europe.

**PROGRAMMING**

**Comedy Central** has greenlit three specials from comedian *Jeff Dunham* with the first to debut this month and two specials currently scheduled to be released in 2021. "Jeff Dunham's Completely Unrehearsed Last-Minute Pandemic Holiday Special" will premiere Nov 27 at 8pm. – **Nat Geo** greenlit the second season of "The Hot Zone," which will focus on the anthrax attacks of 2001. – In memory of *Alex Trebek*, **Game Show Network** will air a six hour "Jeopardy!" marathon on Saturday from 9am-3pm. Game Show Network talent will share words of tribute throughout the marathon. – **HGTV** greenlit a new series based on the Instagram sensation "Cheap Old Houses." *Ethan* and *Elizabeth Finkelstein's* venture has more than 1.4mIn followers, and the series of the same name will premiere in summer 2021. – **Shudder** will spread Christmas fear with "A Creepshow Holiday Special," set to premiere on Dec 18 on the streaming service.

**PEOPLE**

**CommScope** named *John "Jack" Carlson* to the position of chief commercial officer. Carlson most recently served as pres/CEO of **Sullair**, a global industrial air compressor manufacturer.

**EDITOR'S NOTE**

Be sure to [RSVP](#) for **Cablefax's** Dec 4 Most Powerful Women celebration at 4pm ET. The free, virtual event will salute this year's Most Powerful Women (the magazine drops the morning of Dec 4). We'll also pay tribute to the 2020 Cablefax WaveMakers—**NBCU's** *Kerry Brockhage*, **A+E Networks' Brie Miranda Bryant**, **Tubi's** *Andrea Clarke-Hall*, **ViacomCBS' Lily Neumeyer**, **OWN's** *Tina Perry*, **National Geographic's** *Michelle Upton*, **Food Network & Cooking Channel's** *Courtney White*—as well as the Rising Tide, made up of under 30 phenoms. Special recognition awards include **INDEMAND's** *Dale Hopkins*, **CMT's** *Leslie Fram*, **OWN's** OWN YOUR VOTE initiative and **A+E Networks' Employee Mentoring**.

## Think about that for a minute...

### Me Marketing

Commentary by Steve Effros

We've all grown up in the video programming/distribution business focused on the "mass market." We focused on mass market appeal, mass market advertising, mass market scripting and the like. The whole idea was you were trying to create video programming that would attract the largest audience possible. The "Nielsen" ratings ruled the day. Not so much anymore.

The change has been slow, but inexorable as more programming outlets developed. Blame cable television. You see, once specialized channels started to develop, there was an inevitable drain from the "mass market" channels to the specialized ones. News, sports, documentaries, nature, food and all the others started to affect the ratings of the "big four" broadcast networks. ABC, NBC, CBS and Fox had a huge advantage over the cable channels and still do; they were given free distribution channels by the government. They also had many decades to develop their audiences before the cable channels arrived.

Those broadcast networks are still doing very well. They are expert at focusing on "popularized" programming. The measure of whether a program survives on broadcast television is not necessarily whether it's good, creative or accurate, but whether it can attract a mass audience.

For cable programmers, it's different. They are trying to attract, in most cases, a specific audience. A specific demographic, a specific age group or interest group. Thus the numbers no longer relate to "mass" audience, success is measured by the programmer based on the ability to attract and hold a specific audience. This is getting even more pronounced as we move toward, effectively, "a la carte" programming as channels are sold in unique, exclusive packages or individually.

Consider, for instance, if there were a "news" package. We know the nature of the viewership Fox News would get. Same with MSNBC and CNN. The analysis of who cares about watching what gets a little more murky with the broadcast networks. But just looking, for instance, at all the articles about who "won" the ratings on election night, the headline is somewhat

misleading when it notes that Fox News, with 13.7 million viewers "won." Well, won what? In fact, if you take the other "cable news" outlets showing election results, MSNBC, with a total of 12.9 million viewers, and CNN, again going after essentially the same demographic getting 9.1 million viewers, you can see that there may be a total misunderstanding of what the ratings might mean if there were separate, unique and exclusive packages.

If we are, indeed, moving toward exclusive packaging of programming, or even more problematic, single-channel direct sale of product, the challenge will not be to attract a "mass" audience, it will be to establish a reputation as providing a very specific, consistent product to a sub-group of viewers. Not only is this difficult to do over the long term, it also requires a level (and cost) of marketing that we have not experienced since the early days of HBO. Some of us still remember the old days when motels would have "HBO" on their road sign rather than "cable," even though it was cable they were actually offering.

My concern is that this "me marketing," drilling down directly to a limited demographic's interests, particularly if it's exclusive and subscription based rather than "mass marketing" may prove to be incredibly confusing and expensive for both the viewer and the programmers and distributors.

We may be getting so specialized the competition within narrow categories could become ruinous. What then? Well, back to broad-based packages! Right where we started.



Steve

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*(Steve Effros was President of CATA for 23 years and is now an advisor and consultant to the cable industry. His views do not necessarily reflect the views of Cablefax.)*

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