

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Universal Broadband: Outlining Next Steps in Bridging the Divide

Over the past four years, “bridging the digital divide” has been the broadband catchphrase du jour inside Washington. It seems likely “universal broadband” will be the buzzword under the *Biden* administration with the pandemic further magnifying the need for internet access.

“I don’t think industry can bridge this gap alone,” **House Commerce** chmn *Frank Pallone* (D-NJ), who was re-elected to as chair Thursday, said during a **USTelecom** virtual forum titled (naturally) “The Path to Universal Broadband.” He said approving an infrastructure bill will be a top committee priority for the 117th Congress. The House passed the Moving Forward Act in July that invested more than \$100bln in broadband-related programs in underserved areas, but the Senate hasn’t acted on it. “I do believe with the new administration, if you look at what President Biden has proposed, it’s very similar. Hopefully, we can get it passed in the new Congress. It’s not going to happen in the lame duck,” Pallone said.

That doesn’t mean nothing will happen between now and January. There’s that omnibus spending bill that needs to pass before the Dec 11 government shutdown deadline. “From what I understand, that bill will include money for the [broadband] maps. It probably won’t be fully funded, but it will include money,” the Commerce chmn said. “We were very happy to work with you all to get that Broadband Data Act signed into law, but it didn’t have any money. So hopefully, we’ll have money

in this omnibus if it passes next week.”

There are government-backed broadband programs that are moving ahead. Last week, Phase 1 of the **FCC’s** Rural Digital Opportunity Fund auction ended, with up to \$16bln in support for broadband projects in unserved areas up for grabs. Names of winning bidders are expected to be released any day now. “The program attracted broad interest from a wide range of service providers,” an FCC spokesperson said. **Charter, Mediacom, Cox, Midco** and **Verizon** were among the 386 bidders qualified to participate in the RDOF auction.

Speaking at the same USTelecom forum Thursday was *Nicol Turner Lee*, director of the Center for Technology Innovation at the **Brookings Institution**. Her name has been mentioned as a possible FCC or **FTC** commissioner pick. She thinks revisiting universal service should be the new administration’s first order of business. “We have a universal service fund program that has actually been created... before the advent of this new technology. The supply and demand model sort of blows out of the oven anything we might have assumed about communications services years prior,” she said. In addition to looking at increasing the lifeline amount offered as a subsidy and opening the fund to different technologies, she suggested approaches such as making .gov websites not count against a data cap. Those sites could be used to find work, apply for benefits, renew driver’s licenses, etc.

“When you look at the major challenges facing the incoming Biden administration, economic recovery, pandemic recovery,



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Source: Nielsen. 1. Reach, P2+, M-Su 6a-6a Thanksgiving Week (11/23/20 - 11/29/20), 2. Rank vs. all ad-supported cable nets, P2+ and W18+, M-Su 6a-6a, (11/23/20 - 11/29/20), 3. Thanksgiving Week 2013-2020, M-Su 6a-6a. Rank vs all ad-supported cable nets on W18+(000), 4. Rank vs. all cable and broadcast nets, P2+, W18+, M-Su 6a-6a (11/23/20 - 11/29/20), 5. HALL's *Christmas Waltz*, 11/28/20, Strict Daypart: Sa 8p-10p. vs. Ad-Supported Cable and ABC, CBS, CW, FOX & NBC. All data is program-based and LSD.

social inequities and climate change, broadband is critical to every one of them,” **AT&T Communications** CEO *Jeff McElfresh* said at Thursday’s forum. “There’s a lot of common ground on reaching two key goals—making broadband affordable for everyone and making it available to everyone. I’m convinced we can do both and close the broadband gap by taking four concrete steps.”

He identified those as: 1.) precise mapping and data 2.) modernize universal service programs with direct appropriations from Congress 3.) use tax dollars wisely for rural broadband, but keep it technology agnostic [“I say that because current federal subsidy programs somewhat tilt toward fiber. For sure, fiber first is a laudable goal, but as you all know, it’s quite expensive and it’s not the only way to connect every community,” he said, pointing to alternatives such as fixed point wireless internet] 4.) keep a light touch regulatory approach. “Support these things and we’re finally on the way to digital equity,” McElfresh said. “Together, let’s embrace this worthy goal and make our mostly good broadband story good for all.”

2021 WARNER BROS FILMS HIT HBO MAX, THEATERS

Expect **Warner Bros.’** distribution strategy to look wildly different in 2021. In an industry changing move, the company announced that all 17 of its films slated for next year will be released simultaneously on **HBO Max** and in theaters, the same way that “Wonder Woman 1984” is set to debut on Christmas Day. However, the films will only be available for a month on HBO Max, concurrent with the US commercial release. The company said the hybrid model was created as a response to the ongoing pandemic, particularly in the US. After the month on the

streamer, the films will still be screened in theaters in the US and internationally, and then will follow customary distribution windows. And if you haven’t upgraded your TV, you might want to. All films will be available in 4K Ultra HD and HDR on HBO Max.

HELLO DARKNESS, MY OLD FRIEND

It’s Thursday evening and **DISH** is going on 24 hours without **Nexstar** stations, while **AT&T/DirectTV** is nearing the 48-hour mark without **TEGNA** broadcast stations. Guessing when they will return is about as easy as picking winning lotto numbers, but history may offer some clues. **TDS** lost Nexstar stations in 10 cities, including Las Vegas, for a month at the start of 2019. This, of course, was months before Nexstar closed on its \$4.1bln purchase of **Tribune** stations—a deal that made it the largest owner of local stations in the US. TDS is smaller than DISH, but even the big guys aren’t immune. AT&T/DirectTV lost 125 Nexstar stations in July 2019. That blackout, which included the MLB All-Star Game, lasted nearly two months. DISH lost the Nexstar stations at 7pm ET Wednesday. Nearly 5.4mln customers are impacted, with DISH no longer able to carry 164 Nexstar stations until a new deal is reached. The impasse spans 115 markets, including L.A. and Charlotte, NC. As per usual, both sides blame the other with money and carriage of **WGN America** among the sticking points. If history is any guide, TEGNA-AT&T may be resolved faster. DISH lost TEGNA stations for mere hours in December 2018, while **Verizon** lost some of the broadcaster’s stations for two days at the start of 2019. But it’s 2020 now, and anything is possible...

THOUGHTS ON DISCOVERY+

Analysts dissecting **Discovery’s** long-teased streaming service



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discovery+ are questioning the lack of long-term guidance for the SVOD. Though the company did outline a 70mIn serviceable addressable market in the US and 400mIn internationally, execs shied from providing sub goals. “If management doesn’t have enough confidence to provide a guidance range, then why should the public markets choose their own subs/ARPU/revenue expectation and price it into the stock, today?” wrote *Todd Juenger* from **Bernstein Research**. At **MoffettNathanson**, analysts believe the serviceable addressable market is a massive potential growth opportunity, but the service is expected to operate at 20%+ margins, below the 40%+ range achieved at the legacy cable nets. “Thus, in order to create enough EBITDA to offset the structural declines in that business, discovery+ will have to succeed in converting its stated SAM from potential subs to paying consumers, and on a relatively large scale,” the firm said. Analysts spoke favorably on the partnership with **Verizon**, with **Evercore** reading it as an “incremental positive.” The analysts said they see a total opportunity spanning approx 22mIn “free trial” subs with an average trial length of 7-8 months. One concern is the potential cannibalization of its cable nets. “The entirety of its business is built on its traditional cable networks, which given the nature of content could likely be highly cannibalized by a DTC offering,” said MoffettNathanson. “The company may be able to offset this by launching in partnership with MVPDs, but we would argue the service is inherently more cannibalistic than Disney+.” MoffettNathanson did note that Discovery does continue to put emphasis on its linear business, and aside from its originals and library, it will not include live feeds of its US networks and only add new episodes in a more traditional approach after the season is complete. “Discovery also argued that MVPDs won’t drop them because of the sheer size of their female cable viewing share and the net cost attractiveness of their rate card,” the firm said. Finally, Bernstein questioned Discovery’s claim to be the only DTC service focused exclusively on unscripted/factual content. “They are forgetting **CuriosityStream**,” the service created by Discovery founder *John Hendricks*. Bernstein also pointed to unscripted/factual programming on other SVODs, including multiple food/competition/cooking shows on **Netflix**. Not to mention the entire **Nat Geo** brand on Disney+. “How many consumers care so much about unscripted/factual that they will sign up to an additional, incremental SVOD service specifically for that purpose?” said a Bernstein note.

MTV, VH1 COMMITS \$250MLN TO DIVERSE CONTENT

ViacomCBS’ MTV Entertainment Group announced a commitment of \$250mIn over the next three years to help fuel the growth of content created and produced by BIPOC and women-owned and operated production companies. As part of the newly formed studio, which includes MTV and **VH1**, the group will provide funding, production infrastructure, services and staff to develop new creative, formats and ideas for unscripted content.

BROADBAND GROUPS CALL FOR MORE FUNDING

NCTA, USTelecom and 10 other trades have asked Congress to extend broadband funding tied to the CARES Act in an effort to continue expanding internet access to more Americans. “As

schools and businesses close again, broadband service offers a lifeline to health services, continuing education, and skilling and employment opportunities,” the groups wrote Wednesday in a joint letter to House and Senate leadership. “Therefore, as you finalize end of year legislation, we respectfully ask you to support funding for broadband service for families and students by extending the current CARES Act funding and ensuring that the **FCC** has funding to develop accurate broadband maps.”

AMC NETWORKS JOINS UMC, WE TV STRUCTURE

AMC Networks is strategically aligning its **UMC** streaming service and **WE tv** under a common leadership team run by UMC’s former chief content officer *Brett Dismuke*. He will now serve as general manager, UMC and WE tv. Dismuke will report to AMC Networks pres, SVOD *Miguel Penella*. Key members of Dismuke’s leadership team will include WE tv evp, development and original programming *Lauren Gellert*; UMC vp, development and original production *Nikki Love* and WE tv svp, production and business affairs *Theresa Patiri*. Former UMC general manager *Sylvia George* will now be responsible for performance marketing across all of the company’s targeted streaming services.

RATINGS

The quarterfinals of the Liga MX playoffs on **Univision’s** networks have delivered three of the four top-rated matches of 2020 on any network in any language. Saturday’s telecast at 10pm pulled in 2.5mIn total viewers, the highest-rated soccer match on any net in 2020. On Thanksgiving night, the 7:30pm game averaged 1.6mIn total viewers, the third-most watched match of 2020. And that day’s evening game at 10pm pulled in 1.5mIn total viewers, the fourth-rated soccer match of the year.

PEOPLE

Crown Media Family Networks named *Lara Richardson* as CMO. She was previously group evp for **Discovery** and **Science**.

CABLE TV PIONEERS INDUCTION FRIDAY

Set your alarm for 9pm ET Friday. That’s when **C-SPAN 3** and **C-SPAN.org** will televise the induction of the 54th annual **Cable TV Pioneers** Gala. The event will be available for encore watching on CableTVPioneers.com starting Dec 7. The presentation was produced by **NESN**. Originally scheduled as a live event preceding the **SCTE-ISBE’s** Cable-Tec Expo in Denver (which moved to virtual), this year’s Gala was taped in Jackson Hole, WY, where Pioneer chair *Dave Fellows* and co-chair *Yvette Kanouff* happened to be residing separately and were able to meet up and host the show. This year’s 22-member class features: *Jeff Berenson* (ITV Partners); *Paul A. Broadhurst* (Technetix Group); *Rick Cimerman* (NCTA); *Bob Foote* (KGP Co.); *Daniel J. Greiner* (4th Wave); *Steve E. Kaplan* (Multilink); *Craig Leddy* (Interactive TV Works); *Ann Montgomery* (Charter); *Louise Mooney* (JLM Partners); *Dan O’Brien* (Mediashift); *Elaine Partridge* (Vast Broadband); *Shane Portfolio* (Comcast); *Richard S. Prodan* (Comcast); *Joe Quane* (EdgeConneX); *Zak Raley* (Amphenol); *Dick Rohm* (Cable One); *Jeff Ross* (Armstrong Utilities); *Peter Ruben* (BMP Resources); *Charles Segars* (Ovation); *Gemma Toner* (Tone Networks); *John W. Williams* (Charter); and *Ron Wolfe* (Charter).

PROGRAMMER'S PAGE

Talking 'Trafficked' with Nat Geo's Monroe

Nat Geo's eight-part docuseries "Trafficked with Mariana van Zeller" made its debut Wednesday night, offering up extensive reporting on the underground world of black markets. National Geographic Content pres Courtney Monroe shared with us some of her thoughts on the adrenaline-fueled investigation. **This series goes into some really dangerous territory. How were you able to gain access?** National Geographic has been internationally recognized for getting incredible inside access. However, everything in journalism is about relationships and building trust, and these interviews wouldn't have happened without our award-winning investigative journalist, Mariana van Zeller. Mariana is a total force of nature who doesn't take no for an answer... But what makes her style of reporting unique is that she approaches each of her subjects without judgment and truly wants to tell the stories of the people operating these informal economies to help people—like you and me—understand their motivation to participate in these criminal acts. **Why do you think the series is a good fit for Nat Geo?** We're always looking for programming that captivates, enlightens and enables our audience to find a deeper connection to the world and the people in it. The series speaks loudly to National Geographic's trademark inside access and the power of the brand, to be able to shed a light on black markets that are responsible for fueling the world's multitrillion dollar shadow economy. **Were there any especially challenging or scary moments filming?** One of the biggest challenges we faced with this series was traveling with a crew and getting access to these under-worlds. But the team was able to combine this incredible inside access with beautiful cinematography. There were definitely scary moments along the way, but safety is always a priority for us, so it's important for the team to establish ground rules and guarantee the anonymity of the subjects being interviewed. – Amy Maclean

REVIEWS

"Earth at Night In Color," premiere, streaming Friday, **AppleTV+**. This production uses cutting-edge cameras to film after dark in Kenya's Masai Mara grasslands. The subjects are a small lion family: father, mother and three cubs. The result is astounding. The picture, which, sorry for the cliché, has to be seen to be believed, is darker than a normal view, but it's terrific otherwise. If not for stars in the sky, at the frame's top, you almost wouldn't know this is night footage. But that's just the visuals. Audio is outstanding too. Even more, actor *Tom Hiddleston's* narration is excellent. The story, too, is compelling, as night footage reveals the lengths a lioness will go to keep her cubs fed and safe. Returning from a hunt, she locates just one of her three cubs. Have hyenas or buffalo made meals of the other two? Perhaps they starved after days without mother's milk? Props to filmmakers *Alex Williamson* and *Isla Robertson* for making us care enough to want to find out in the final moments of a spectacular 24 minutes. – "The Queen's Gambit," streaming on **Netflix**. Since this series about a young girl, her mother and chess debuted Oct. 23, it's late for a review. Yet, believe the hype. "Gambit" is all that and more. An excellent story, well shot and acted. – Seth Arenstein

BASIC CABLE P2+ PRIME RANKINGS* (11/23/20-11/29/20)		
MON-SUN	MC US AA%	MC US AA (000)
FNC	0.967	2,977
ESPN	0.904	2,784
MSNBC	0.732	2,254
CNN	0.659	2,031
HALL	0.431	1,328
HGTV	0.342	1,053
TBSC	0.309	953
HIST	0.283	872
TLC	0.278	856
FOOD	0.276	850
DISC	0.260	801
HMM	0.250	771
ID	0.222	682
USA	0.214	658
LIFE	0.209	644
AMC	0.193	593
INSP	0.192	590
TNT	0.180	555
FRFM	0.176	542
PARA	0.174	537
TVLAND	0.174	535
A&E	0.171	527
ADSM	0.156	482
NFL	0.151	466
BRAVO	0.141	435
WETV	0.140	432
NATGEO	0.138	426
NWSMX	0.137	421
FX	0.129	398
SYFY	0.129	396
GSN	0.119	365
BET	0.114	352
MTV	0.114	351
APL	0.112	346
COM	0.109	335
NAN	0.100	307
TRAVEL	0.099	304
HBO	0.086	266
DSJR	0.085	261
OXY	0.084	257
CRN	0.083	256

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



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