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WHAT THE INDUSTRY READS FIRST

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#1

“MUST-HAVE” TRADITIONAL TV NETWORK AMONG A18+



SOURCE: BETA RESEARCH BASIC NETWORK EVALUATION STUDY, JULY 2021. PERCENT OF TOTAL RATING 4/5 ON 5 POINT SCALE ON BEING A "MUST HAVE" CHANNEL. HISTORY IS TIED WITH DISCOVERY AND FOOD NETWORK. RANKING EXCLUDES NEWS AND SPORTS NETWORKS.

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WHAT THE INDUSTRY READS FIRST

Video Not Found: NBCU Warns of Carriage Impasse with YouTube TV

NBCUniversal is warning **YouTube TV** customers that they could lose access to the company's programming if it and the vMVPD can't agree to a renewal of their current carriage deal. The agreement expires Thursday with at-risk channels including **NBC, Telemundo, E!, NBCSN, USA** and **Oxygen**, as well as the **NBC Sports** RSNs.

"NBCUniversal is seeking fair rates from **Google** for YouTube TV's continued carriage of the only portfolio offering entertainment, Hispanic, news and sports networks. Unfortunately, Google is refusing to make a deal at these fair rates and is willing to withhold entertainment, news and sports programming from their paying customers," a NBCU spokesperson said in a statement. "NBCUniversal feels a responsibility to inform our fans that they are at risk of losing their favorite shows if Google continues with their demands."

YouTube TV said in a company blog post it is still in active discussions with NBCU and is hopeful the pair will reach a new agreement ahead of Thursday. Unsurprisingly, it is also claiming that NBCU refuses to offer the vMVPD fair rates for a service of its size.

"Our ask is that NBCU treats YouTube TV like any other TV provider. In other words, for the duration of our agreement, YouTube TV seeks the same rates that services of a similar size get from NBCU so we can continue offering YouTube TV to members at a competitive and fair price," the vMVPD said

in a blog post. If NBCU's programming is pulled from YouTube TV's lineup, the streamer has promised subscribers that it will drop its monthly price by \$10 to \$54.99/month while the content remains off the platform.

Analysts at **Lightshed Partners** believe the two largest points of contention in this negotiation are carriage of **Peacock** and the inclusion of a most favored nations clause in the agreement with YouTube TV. That clause would ensure both the programmer and distributor offer each other the same treatment given to any other of their partners. Lightshed suggested that NBCU could be playing hardball because it sees this as an opportunity to pull subscribers from YouTube to the benefit of parent company **Comcast** and other businesses in which it has a stake.

"If NBCU goes dark on YouTube TV, YouTube TV will most likely lose subscribers even with the \$10 price drop and ability to sign-up for Peacock Premium and still save \$5/month. We would assume the most likely place YouTube TV subscribers shift to is **Hulu Live**, which conveniently, NBCU owns 33% of," Lightshed said in a note. "In addition, worth considering that some portion of the YouTube TV subscribers that lose NBCU content could go back to Xfinity, especially as Comcast is presumably the broadband provider to a meaningful portion of YouTube TV subs."

Time will tell whether the two will decide to kiss and make up, but news of their dispute seems to signal that the fall will be a continuation of a dispute-filled summer. Of course, we're

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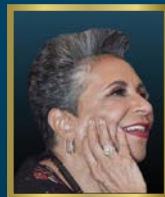
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CYNOPSIS MEDIA

all still waiting to see what will happen between **DISH** and **Sinclair**. Their agreement was first set to expire on August 16, but debate over the **Bally Sports** RSNs has kept Sinclair's programming on DISH's lineup (for now). It is anyone's guess as to when the latest short-term extension will come to a close, or when the saga will reach a resolution. There's also **Heritage Broadcasting**, which saw its stations go black on **DirectTV's** lineup on Sept 3.

INFRASTRUCTURE, DEBT CEILING DOMINATE DC

All eyes on Washington this week. Not only is there the threat of a government shutdown, but there's also the possibility of Biden's \$1 trillion bill being sunk by Progressives who won't vote for the bipartisan legislation without the \$3.5 trillion spending bill gaining approval first. House Speaker *Nancy Pelosi* (D-CA) had originally planned to bring the infrastructure package up for a vote Monday night. Now she's saying Thursday. If it doesn't pass, things could get tricky for the \$65 billion set aside for expanding broadband. "We think there will be a significant amount of chaos and confusion, followed by discussions of efforts to force private enterprises to bear the cost of network expansions into unserved areas and offer subsidies to low-income persons for broadband services, but that ultimately something like the broadband provisions will pass either in another broad infrastructure legislative effort or in a narrowly targeted broadband bill," **New Street Research's Blair Levin** wrote in a research note over the weekend. While an eventual bill seems likely, it won't be speedy. Levin posits that while there's debate going on, private companies will end up paying for things that the government would've covered under the infrastructure bill.

MARTIN THIS YEAR'S WIT WINNER

Patricia Martin, SVP of the Integration Management Office at **Cox Communications**, has been named the winner of the 2021 Women in Technology Award. Launched in 1995 and presented jointly by **WICT**, **SCTE** and **Cablefax**, the award celebrates the achievements of one woman who has shown both outstanding professional achievement and offered significant contributions to the advancement of the cable telecommunications industry. **JC2 Ventures** partner/CTO *Yvette Kanouff* will present the award during the virtual SCTE Cable-Tec Expo awards ceremony on Oct 13. Martin will also be featured in an upcoming issue of Cablefax.

MAGNA UPS AD SPENDING FORECAST

Local broadcast and cable TV is the only media sector that **Magna** projects will end 2021 with negative growth (down 4.7%). Total video spending, which includes digital video and OTT is expected to climb 11.4%. For the first half of the year, local stations and local cable sales were up +13%, while broadcast and cable's national ad sales were up 10%. The **IPG** firm said Monday that it expects US ad spending overall to climb 23% YOY to \$278 billion, up from its 15% growth prediction in June. The forecast is predicated on COVID restrictions on industries such as travel and restaurants continuing to ease and on supply constraints impacting various sectors not worsening. If those conditions are met, Magna expects spending to top \$300 billion for the first time ever next year, with the Winter Olympics and mid-term elections lending a big hand. "The unprecedented growth in advertising spending in the first half (+32%) was more than low comps due to the COVID lockdown and recession last year. It was caused by a unique combination of national brands



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Our annual must-read highlights operators that are smashing it including MSO of the Year, Charter, and Independent Operator of the Year, TDS.

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Cablefax Daily (ISSN 1069-6644) is published daily by Access Intelligence, LLC | www.cablefax.com | 301.354.2101 | Editorial Director: Amy Maclean, 301.354.1760, amaclean@accessintel.com | VP/Group Publisher, Cablefax and Synopsis: Robbie Caploe, 917.974.0640, rcaploe@accessintel.com | Managing Editor: Sara Winegardner, 301.354.1701, swinegardner@accessintel.com | Director of Business Development, Cablefax: Ellen Kamhi, 917.626.5574, ekamhi@accessintel.com | Dir of Marketing: Kate Schaeffer, kschaeffer@accessintel.com | Production Manager: Joann Fato, jfato@accessintel.com | Kerry Smith, Divisional President, Marketing & Media Group, ksmith@accessintel.com | Group Subs/Subscription Questions, Client Services: 301.354.2101, clientservices@accessintel.com | Annual subscription price: \$1,799.00/year | Access Intelligence, LLC, 9211 Corporate Blvd., 4th Floor, Rockville, MD 20850

reconnecting with consumers and competing for a limited amount of traditional media inventory, while the lasting changes of COVID on lifestyles and marketing methods continue to fuel huge digital advertising spending from both big brands and small businesses,” said MAGNA EVP Vincent Letang.

COX, LAS VEGAS LAUNCH SMART CITY PILOT

Cox Communications and the City of Las Vegas have launched one of the first city-led managed private networks to facilitate smarty city use cases. Using a CBRS private network, the 12-month pilot program will deliver insight into visitor attendance and after-hours activities at Baker Park via parking lot management, safety detection and trend analytics. The CBRS network will initially support video cameras and associated sensors fixed to existing light poles throughout the park. A combination of cameras and radar sensors will be connected to CBRS-enabled wireless bridges that are fed from a central three-sector radio site.

R. KELLY FOUND GUILTY

Lifetime's 2019 Peabody award-winning documentary series “Surviving R. Kelly” increased calls for the R&B singer to face legal consequences over allegations he sexually abused women and minors. On Monday, a jury found him guilty of racketeering and sex trafficking, with the musician facing the possibility of life in prison. “We commend the survivors for their bravery in speaking out and sharing their stories. Regardless of what the verdict is, they have opened up important conversations on sexual violence that needed to happen,” read a statement from the network and executive producers of the Peabody award-winning documentary.

DISH DIVING DEEPER INTO BLOCKCHAIN

DISH and **Input Out Global** are teaming up to explore blockchain and the use of distributed ledger technologies across business units. The pair will develop applications designed to support and enhance experiences for the **Boost Mobile**, **DISH** and **Sling TV** customer cases. The applications will be built on the **Cardano** public blockchain platform.

PROMOTIONS

Redbox and **Roku** have signed a promotional partnership to spread the word about the former's streaming app. Through mid-2022, consumers will receive a \$5 code for Redbox movie rentals when purchasing Roku players sold at Walmart.

DISTRIBUTION

Ovation TV's travel and entertainment channel **JOURNY** is now streaming on **VIZIO** SmartCast TVs. Users will now be able to access the channel on VIZIO's WatchFree+ free streaming platform and electronic program guide.

RATINGS

Telemundo's Billboard Latin Music Awards delivered 1.66 total viewers via linear Thursday. Across digital and social, the show delivered 49.2 million views across all on-domain platforms, social accounts and **YouTube**, representing a 24% increase versus 2020.

INTERNATIONALLY SPEAKING

The **NHL** is going global. That seven-year **Disney-ESPN** deal

announced in March includes the right to bring games to 109 countries beginning with the 2021-22 season. Coverage will appear across Disney's ESPN networks and streaming platforms (including **Star+**, ESPN Player and the ESPN App), depending on the region. In Australia, New Zealand & the Pacific Islands, ESPN and ESPN2 will televise a minimum of two regular-season NHL games per week, plus the Stanley Cup Playoffs and the Stanley Cup Final. ESPN Player will provide coverage of every NHL game each season in a dozen countries across Europe.

PROGRAMMING

Playwright and filmmaker **David Talbert** is working with **Disney Branded Television** on a musical series, “Madelyn Square Gardens,” about a young woman from Mississippi who moves to New York with big Broadway dreams. Talbert wrote, directed and produced **Netflix's** “Jingle Jangle: A Christmas Journey” and won the **NAACP's** Best Playwright of the Year Award for his “The Fabric of a Man.” – **Newsmax** will syndicate Baltimore conservative talk radio show “The Rob Carson Show” weekdays from noon-3pm ET. The WCBM 680 show made its Newsmax debut Monday. – **A&E** brings back its noir true crime series “City Confidential” on Oct 28. – **Turner Sports** inked a multi-year extension with **Candace Parker** that will see her continue as a studio analyst across **NBA** on **TNT**, **NBA TV** and **NCAA** tournament coverage. Turner also announced that **Stan Van Gundy** will return as a season-long NBA on TNT game analyst.

DOING GOOD

More than 250 **Atlantic Broadband** employees, family members and partners volunteered their time on Saturday to plant trees in seven states served by the provider. Participants planted five- to seven-gallon trees at 19 elementary, middle and high schools in New Hampshire, Connecticut, Pennsylvania, Maryland, Virginia, South Carolina and Florida. The effort was part of a larger “1Cogeco Community Involvement Day,” which also saw employees of Atlantic Broadband's parent company **Cogeco** planting trees in Canada. In total, more than 700 participants in the U.S. and Canada participated in the event.

PEOPLE

Comcast Spectacor named **Russell Arons** president of **G4** ahead of the network's return to linear, OTT and streaming channels later this year. She last served as gm of **Machinima**, a division of **Warner Bros. Digital Networks**, and has spent time at **Electronic Arts** and **Mattel**. – **ESPN** upped **Freddy Rolón** to svp, programming and scheduling. He'll lead the content strategy and schedule for ESPN's linear networks and continue to oversee the **ESPN Deportes'** linear and digital business. He joined the programmer in 2004 after completing an internship at ESPN International. – **Sanford Williams** has been elevated to deputy managing director of the **FCC's** Office of Managing Director. **Joy Ragsdale**, currently field counsel in the Enforcement Bureau, will transition to lead the Office of Communications Business Opportunities. Williams, who first joined the FCC in 1999, will continue to serve as a special advisor to FCC acting chair **Jessica Rosenworcel** with a focus on efforts to identify opportunities for communities that have been historically underserved.