

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

TDS Talk: Fiber Land Grabs, Sizzling Cable MVNO Competition

While **Verizon** and **AT&T** seem to be taking a wait-and-see approach when it comes to the competitive threat presented by cable MVNOs, **US Cellular** is singing a different tune.

Over the next three years, cable's expanding wireless offering is the biggest concern for US Cellular President & CEO **Laurent Therivel**. "If you just look at the share of gross adds over time in my footprint, the inroads are being driven by cable," he said during a Citi investor conference Thursday. "We probably have cable offers in about 50% of our footprint. **[Charter's]** Spectrum Mobile is the biggest threat we face. They have a compelling price point that we have to go beat or at least compete with."

Over the past year, Charter's senior leadership team has trumpeted a strategy to drive wireless growth by focusing on the financial discount it can offer mobile customers. At the end of 3Q21, Spectrum Mobile served a total of 3.2 million lines, with 1.1 million added over a 12-month period.

Some two-thirds of Citi conference attendees answering a real-time survey question about competition believe **T-Mobile's** expansion into US Cellular markets is a bigger concern, with only 17% citing cable MVNOs. Therivel remarked that he takes all risks seriously, but believes US Cellular is helped by its established, strong rural footprint. He suggested T-Mobile will have to put forth a lot of proof points to overcome an inherent skepticism in rural America when it comes to promises of a great experience.

While Therivel will keep a close eye on cable's wireless march in the near term, he feels ultimately it will be difficult to do well in wireless without owner economics.

US Cellular is America's fourth-largest wireless carrier and a business of **TDS**. TDS also operates **TDS Telecom**, which includes cable operations, traditional wireline assets and overbuilding. When it comes to the telecom side of the house, President & CEO **Jim Butman** opined that the opportunity for growth through broadband is unprecedented with TDS rapidly pursuing market expansion. But it's a land grab right now.

"The best opportunities are being taken. We aren't the only ones doing this. We are all looking at the markets and planting our flags very quickly before someone else gets there," Butman said at the conference. "When we mark for instance Billings, Montana, that's setting up a flag so that people at least know there's an overbuilder in that area. There's a great opportunity out there, and I think it's going to be around for a good five to six years. But in the next two to three [years], we want to get the very best."

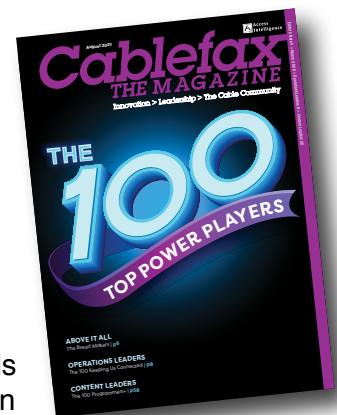
The Fiber Broadband Association's just-released Fiber Provider Study backs Butman's assertion that broadband is entering its largest investment cycle ever. The research, performed by **RVA LLC Market Research & Consulting**, shows that fiber broadband now passes over 60.5 million homes in the U.S.—a 12% growth in 2021. The study suggests that if all federal infrastructure funding is directed at fiber, there could be more fiber deployed in the next five years than all the fiber



Who Deserves to Rank Among Cablefax's Annual Top Power Players?

The Cablefax 100 salutes the most influential executives whose leadership continues to take the industry to new heights. We will rank the top professionals in the media, cable & broadband industry and publish the list in the June edition of Cablefax: The Magazine.

It's free to enter — but you must submit your entries by January 21!



Nominate at www.Cablefax100.com | Questions: Mary-Lou French at mfrench@accessintel.com

deployed to-date, enabling the initial U.S. FTTH build to be nearing completion by the end of this decade.

FBA's report found that larger providers such as AT&T, Verizon, **Lumen** and the top five cable MSOs have built nearly three-fourths (72%) of overall fiber broadband access, with Tier 2 regional operators like **Windstream, Frontier, Consolidated** and TDS making up 10% of the growth. But the U.S. is unique in that there are more than 1,200 Tier 3 market players, including cable ops, rural electric companies and rural telcos, with smaller projects ranging from a single state to three or four states compose the other 17% to 18% of the build.

To aid in market selection, TDS has developed software for gauging how underserved a market is, the strength of household formation and how supportive the community is in terms of permitting, etc.

“Operational priorities for the next year are to generate topline growth. Grow already high broadband market share in both wireline and cable,” Butman said. “We’re scaling up our quarterly run rate on our build fiber addresses, that’s a key metric. We’ll meet and likely beat, as we usually do, our market pre-sale targets in our out-of-territory markets. We are building a much larger funnel of market opportunities to build fiber because we see this opportunity as unprecedented.”

NTIA LEADERSHIP KEY FOR 5G SPECTRUM

Government agencies sparring over the **FCC's** spectrum actions is nothing new, but many believe it could be avoided if **NTIA** fully embraced its role as the manager of the federal government's spectrum assets. However, *Asad Ramzanali*, Legislative Director for the Office of Rep. *Anna Eshoo* (D-CA), believes that can't happen until the Senate approves President *Biden's* nomination of *Alan Davidson* to lead the administration. “This isn't a recent NTIA thing. This is the last many years, especially in the prior administration where the NTIA wasn't doing this part of it, coordinating with other agencies,” he said during a **CES** panel Thursday. “I'm hopeful that with Alan Davidson presumably getting in soon that we won't see that kind of issue... we shouldn't see agencies fighting on CNN.” FCC commissioner *Nathan Simington* was slated to be a part of the CES panel, but wasn't there. An FCC staffer told **CFX** that Simington was unable to attend due to illness. Once Davidson takes his seat at the head of the agency and with the eventual confirmation of a fifth FCC commissioner, the hope is that the FCC will be able to push forward on efforts to free up midband spectrum for 5G. As for which spectrum bands is key to the future of next-generation wireless services, **Samsung** SVP, Public Policy/Acting Head, U.S. Public Affairs *John Godfrey* pointed to the recently wrapped 3.45-3.55GHz auction as well as CBRS spectrum as critical pieces of the

Cablefax Executive Round Up

What are your predictions for 2022?



John Brauer

VP, Insights & Analytics

Effectv

“We expect 2022 to be a breakthrough year in how we can use impression-level, cross-platform measurement to better understand how advertising influences buyers of marketers' products move through their journey from awareness, to research, consideration, and purchase. Rather than focusing on measuring a single phase in the buyer journey, we expect new techniques to understand how different audiences respond to a marketer's messages to guide their decisions in the products they choose to buy.”



Welby Chen

COO

JW Player

“Over the last decade, there's been a widening glut of streaming services available to consumers. With growing subscription fatigue, I expect large media conglomerates who own multiple streaming services (both free and paid), will consolidate their apps and services to streamline their consumer options. Audiences will have the option to choose the payment tier that best suits their needs, and in exchange, media companies will have more loyal audiences.”



Paul Pastor

Chief Business Officer and Co-Founder

Firstlight Media

“2022 will be a year when OTT providers zero in on two pandemic issues: cleaning up metadata to enable more targeted, robust consumer experiences, and leveraging the cloud to clean up inefficient production and distribution systems. Providers who gathered low-hanging subscriber fruit over the past two years now are tackling the challenge of retaining that audience as consumers app-hop to other services and return to leisure options outside the home. A focus in the coming year will be on metadata—the capture, cleanup and standardization required to enable recommendation engines, advanced search capabilities, editorial input and other engagement tools.”



Dr. Abdul Rehman

CEO and Co-Founder

SSIMWAVE

“One of the big trends we see is TV manufacturers and aggregators scrambling to become the gatekeepers for streaming services. App aggregation led by platforms such as Comcast Xfinity Flex and Amazon Prime will continue to simplify the customer experience and reduce the need for viewers to juggle multiple apps and user experiences; and Smart TV manufacturers (led by Roku, Amazon, Samsung, LG, Comcast and Google) will flex their position as the connected TV gatekeepers for streaming premium content—especially for free ad-supported services (FAST). As these gain traction, content from multiple providers will exist side-by-side, and differences in video quality will be magnified. It will be essential that each of the partners—the aggregators and the gatekeepers—implement viewer experience automation tools to present their products in the best light.”

puzzle. Looking further out, work is currently being done to examine if there's a way to clear or share spectrum on the 3.15-3.45GHz band, which is mainly being used today by the U.S. military. *Emily Hebein*, Legislative Assistant for Rep. *Bob Latta* (R-OH), also highlighted the 2.5GHz band, calling it "low hanging fruit" and urging the FCC to move to authorizing that auction of flexible-use licenses.

THE CW FOR SALE

WarnerMedia and **ViacomCBS** are looking to sell a significant stake or potentially all of **The CW**. *WSJ* was the first to report the news. *Mark Padowitz*, the network's CEO, confirmed the uncertainty about the network's future in an email to staff Thursday, saying it is too early to speculate what might happen. The *WSJ* report highlighted **Nexstar** as an interested party, particularly as the broadcaster has doubled down on its dedication to content investment over the last year. *Nexstar* introduced two new digital subchannels in September and rebranded **WGN America** into **NewsNation** last March.

COX RATE INCREASES COMING

Cox Communications joins other MVPDs, including [Comcast](#), in ushering in 2022 with a round of rate increases. Rate changes vary some by market, but are generally in the same ballpark across its footprint. Most video packages are increasing by 6-9%, while grandfathered TV packages are seeing a slightly lower upticks. In Connecticut, the monthly rate for Cox Contour Preferred will jump \$8 to \$98 starting next month, while Cox Starter will increase \$3 to \$53. That market's broadcast surcharge is jumping nearly 19% to \$19/month, while the regional sports fee is being raised to \$12.50 from \$11. As in past years, Cox blamed the rising cost of TV content as the primary reason for the adjustments.

WARNERMEDIA SHOPPING FOR MEASUREMENT HELP

WarnerMedia has joined the ranks of those media companies exploring alternatives to **Nielsen** measurement. It has completed its preliminary discovery process, choosing **Comscore**, **iSpot.tv** and **VideoAmp** as the partners that could add the most value to WarnerMedia's inventory and advertising partners. Next will come a test-and-learn where the company hopes to offer its current advertisers greater visibility into their return on investment. Additionally, WarnerMedia wants to put into place an audience-based approach to inform media planning and buying. While it has focused on reach and frequency in this initial discovery process, WarnerMedia will be expanding that process this year to account for other metrics and outcomes-based solutions.

ALLEN MEDIA GROUP DEBUTS SPORTS.TV

Allen Media Group officially launched free streaming platform **SPORTS.TV** Wednesday. The app will serve as a home to sports content, news, movies, documentaries and will grant viewers access to local broadcast television stations. **SPORTS.TV**'s initial lineup includes more than 60 free channels including **Pac12 Insider**, **SportsGrid**, **HBCUGo.TV** and **Racing America**. The streamer will live under a newly-created division within Allen Media Group called Allen Media Digital. At launch, it is available on iOS

and Android, **Amazon Fire TV** and online. It is coming soon to both **Roku** and **Apple TV**. **SPORTS.TV** plans to also introduce paid options like regional sports networks, pay-per-view, ticket and merchandise sales and sports betting by the end of the year.

CHARTER PROVES SYMMETRICAL MULTI-GIG SPEEDS

Charter and **Vecima Networks** have demonstrated speeds greater than 8.5Gbps downstream and 6Gbps upstream on HFC cable plant. The lab demonstration was built using DOCSIS 4.0 System-on-a-Chip for Remote MACPHY Device and cable modem solutions. "This provides proof that our network is capable of offering multi-gig speeds bi-directionally," Charter SVP, Network Engineering & Technology *Joe Godas* said in a statement. "Having this technology offers an option for future improvements and continuing to evolve our leading service for years to come."

NO MUST CARRY FOR YOU

The **FCC** Media Bureau denied **CNZ Communications'** must-carry complaint against **DirectTV**. **CNZ** was seeking to force **DirectTV** to carry full-power station **WGBP-TV** of Opelika, Alabama, as a new station in the Atlanta DMA. It is currently being carried by **DirectTV** in the Columbus, GA, DMA pursuant to the station's Sept. 29, 2020, must carry election notice for the 2021-2023 cycle. On Oct. 1, 2020, **Nielsen** changed the station's DMA from Columbus to Atlanta. The station located a DTS transmitter near the Atlanta DMA and demanded mandatory carriage in the Atlanta DMA as a new TV station. **DirectTV** denied the request, saying **WGBP** doesn't qualify as a new station under FCC rules (new stations can elect must-carry in the middle of an election cycle). The Media Bureau agreed, saying **WGBP** was "providing over-the-air service in the Atlanta market at least as early as 2014, and did not become a new television station by virtue of the placement of its DTS transmitter in the Atlanta market." However, it added that based on its present Nielsen DMA and its community license in the Columbus DMA, the station could assert mandatory carriage rights in both the Atlanta and Columbus markets for the next must-carry election cycle, which commences Jan. 1, 2023.

COX SHOWING HAMPTON ROADS SOME LOVE

Cox is making a more than \$100 million investment over the next three years in its Hampton Roads, Virginia, network that will allow it to deliver multi-gig speeds to those customers. The provider has invested \$55 million over the last 5 years in Hampton Roads, and was the first provider to make gigabit service available to all customers in the market.

DISTRIBUTION

OWN is now available to **Hulu + Live TV** subscribers. The partnership adds to the portfolio of Discovery nets already available on the vMVPD, which includes **Discovery Channel**, **Food Network**, **ID**, **HGTV**, **TLC**, **Animal Planet** and **MotorTrend**. Additional Discovery nets like **Magnolia Network** are available in **Hulu + Live TV**'s \$7.99/month entertainment add-on package.

RATINGS

Wednesday night's Nets-Pacers game averaged 156,000 total viewers on **YES** in the NY DMA, making it the most-watched Nets game on the RSN since last January's Nets-Cavs game (159,000).

PROGRAMMER'S PAGE

OWN Film Focuses on Black Women & Fertility

Chiquita Lockley didn't set out to make a documentary on Black women and fertility challenges, but a trip to the doctor changed that. "My gynecologist, who was an excellent Black physician, looked at my chart and she said, 'You have a birthday coming up. Your eggs are turning 42. What do you want to do with them?'" recalled Lockley, executive producer and director of **OWN** doc "Eggs Over Easy: Black Women & Fertility." "I completely blacked out. I plan things. I knew my next gig, my next vacation. I knew I was going to brunch that Sunday. I knew all these things. But nobody had ever asked me to make a plan for these eggs, and I already knew I had fibroids, which compounds everything." It threw her that no one in her circles was talking about fertility. Studies show Black women are 2-3 times more likely than white women to have fibroids and are at least twice as likely to have their uteruses removed through a hysterectomy. To help start the conversation, Lockley planned to make a 10-15 minute documentary. As she started mentioning the short to her friends, more shared their own struggles, eventually extending the project to a feature film. Spelman and Morehouse College alum helped fund a Kickstarter campaign that helped her finish a sizzle reel to shop the doc and secure more funding. The result is an 84-minute film that includes emotional testimonies from Black women, including Oscar-nominated actress *Andra Day*, on topics such as IVF, adoption and surrogacy. "This was almost a five-year process of making sure that this story, and all of these women's stories, are told," said *Keshia Knight Pulliam*, who narrates the film and shares her own journey. During a virtual roundtable on the film, Pulliam described how after giving birth to her daughter a white lactation specialist came into the room. Instead of helping with latching, she began to inform her about WIC options. "If she was able to make this set of assumptions about me, how many other women during her career has she done the same thing to and had no accountability for it? So that's what we have to tackle. We have to have these conversations so that we can advocate for ourselves, hold people's feet to the fire and make them understand that we are just as valuable of lives as anybody else." *Eggs Over Easy* premiered Tuesday on **OWN** and is available on demand. – *Amy Maclean*

REVIEWS

"Trafficked with Marian Van Zeller: White Supremacy," 10pm, Saturday, **Nat Geo**. The expression 'Truth is stranger than fiction' came to mind watching this ep from the generally excellent series about underworld topics. To better reflect this ep about white supremacy, we'd paraphrase the expression to 'Truth is more shocking than fiction. Much more.' Van Zeller's main point in telling this story about the global network of white supremacists isn't to shock viewers. Or perhaps it's to shock us into demanding our elected representatives push for action. In short, the doc claims the US-based white supremacist movement is in close contact with foreign terror groups, like al Qaeda, and mimics their tactics. Yet Washington has yet to declare these domestic cells terrorist groups. It's difficult, but compelling viewing. – "Yellowstone," streaming on **Peacock**. We came late to this series about a ranch owner in Montana (*Kevin Costner*) and his family. Having just completed Season 4 on **Paramount** Jan. 2, the series' viewers and quality are rising. Costner's gravelly, monotone is perfect for a crotchety patriarch. And the production values are excellent. Caveat: *Yellowstone's* violence can make **HBO's** "The Sopranos" seem mild. – *Seth Arenstein*

BASIC CABLE P2+ PRIME RANKINGS* (12/27/21-01/02/22)		
MON-SUN	MC US AA%	MC US AA (000)
ESPN	1.711	5329
FNC	0.553	1723
PARA	0.409	1273
HALL	0.400	1245
HGTV	0.344	1072
TLC	0.296	922
CNN	0.288	896
TBSC	0.260	811
INSP	0.242	753
MSNBC	0.239	744
USA	0.227	706
FOOD	0.215	670
ID	0.203	633
HIST	0.202	628
DISC	0.179	556
LIFE	0.173	538
HMM	0.172	536
TVLAND	0.171	533
TNT	0.161	503
A&E	0.156	487
WETV	0.147	457
AMC	0.134	419
SYFY	0.133	415
NAN	0.133	414
GSN	0.126	391
FX	0.125	389
COM	0.117	366
FXX	0.117	364
BRAVO	0.113	353
NATGEO	0.109	338
NICK	0.100	313
NBATV	0.098	306
OXYGEN	0.097	303
BET	0.095	297

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

Corporate Licenses

Cablefax Daily

WHAT THE INDUSTRY READS FIRST.

Get reduced subscription rates for multiple readers in your organization.

Find out more! Contact Client Services at ClientServices@accessintel.com

www.cablefax.com

