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WHAT THE INDUSTRY READS FIRST

Stage Set: NTIA Details Steps to Infrastructure Funding Success

NTIA head *Alan Davidson* is still reading through comments from industry stakeholders on how the agency should distribute \$48.2 billion for broadband deployment and accessibility, but he's starting to get a better idea of how those grant programs can achieve success.

During an NTIA oversight hearing hosted by the **House Subcommittee on Communications and Technology** Wednesday, Davidson described a comprehensive plan to ensure the agency can enable as many projects as possible through the Broadband Equity, Access, and Deployment (BEAD) Program. Step one is making folks aware of the opportunities ahead and that they know where to find technical assistance when needed.

NTIA has begun developing what Davidson described as a "muscular" outreach mechanism that will be led by a team of program officers, each of whom will be available to stakeholders from state, local and tribal governments. "The key thing for us is we're building out teams, typically in the tribal digital equity areas, teams of people who come from those communities and understand their needs," he said. Those teams will be fully in place by May 16, the date that NTIA will put out its Notice of Funding Opportunity and states can begin applying for \$5 million planning grants.

Beyond that, there's not much the agency can do until the **FCC** completes the creation of new broadband maps with more granular data that should be more accurate than what

has previously been available at the federal level. According to what Davidson has heard from FCC chair *Jessica Rosenworcel*, those maps will start to become available this summer. Following that will come a two-part challenge process where states and local communities will be able to check the FCC's work. The NTIA will also be reviewing plans submitted by the states and looking for input on whether those states are targeting the right areas that do fit the definition of unserved.

How NTIA will keep track of individual projects and ensure they're using funds appropriately after the dollars have been distributed is still unclear, but Davidson promised multiple members of the committee that transparency is something he and his peers at the agency deeply value. "Sunlight is the strongest disinfectant, and I strongly believe that transparency is a huge element of our accountability," he said. That expectation of transparency will extend to the states as they begin spending the funds distributed by NTIA.

Many of the more than 550 comments submitted to the NTIA recently on its broadband grant programs showed great concern for what will happen in that spending stage. Top areas of interest included how NTIA will use its power to ensure the permitting process occurs as smoothly as possible in all communities. Pole attachments were also a hot topic, and while Davidson doesn't yet have complete answers as to how the agency will approach easing those concerns, he did say NTIA is investigating possible solutions now.

Those logistical problems extend to the workforce that will

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Deadline: June 3
Final Deadline: June 10

Most Powerful Women Nominations

Deadline: August 12
Final Deadline: August 19

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Questions: *Kate Schaeffer* at kschaeffer@accessintel.com

actually be responsible for the physical build of the networks. Davidson said much still needs to be done to ensure there is enough human power to meet the buildout deadlines set forth in the Bipartisan Infrastructure Law.

“We don’t have the workforce to build up, to do the deployments that we are contemplating, so there will be a giant job opportunity ahead of us,” Davidson said. He added a priority should be put on making sure that those jobs are available to new entrants into the cable and telecom world, particularly to those living in the communities that will ultimately receive service because of projects funded by NTIA grants. Community colleges with vocational programs should also be on watch for opportunities for their students to take on entry-level jobs upon graduation.

ALTICE HITS GAS ON FIBER

Altice USA is betting on fiber, announcing an acceleration of its deployment strategy that will see it reach 6.5 million passings by the end of 2025. The strategy, which is an expansion of its ongoing efforts to bring fiber to its **Optimum** customers, will put it on the path to passing more than two-thirds of its footprint with fiber over the next four years. On the **Suddenlink** side, fiber construction is expected to begin this year in parts of Texas. Areas of Arizona, California, Louisiana, Missouri, North Carolina, New Mexico, Oklahoma and West Virginia will also benefit from the fiber expansion efforts. While the leadership team did briefly consider embracing DOCSIS 4.0, it ultimately decided that a bet on fiber had the best chance for success. “We continue to be driven by the herd mentality that fiber is the technology of choice for anyone investing significant amounts of capital into the ground to upgrade their networks or to deploy a new network, and we

just don’t believe that the isolated U.S. market is continuing to drive a very U.S.-centric technology. Even the DOCSIS networks in the European context are all driving themselves to fiber as well,” CFO *Michael Grau* said during the company’s 4Q21 earnings call Wednesday. “We don’t want to be the smartest guy in the street, but we think that following the tried and tested technology... is going to be meaningful in terms of the success of our business.” He’s hoping that fiber build will bring the company back to customer growth. Residential broadband net losses were 2,000 in 4Q21, while video losses came in at 71,000. 2022 could also be the year Optimum Mobile really takes off, if Altice plays its cards right. The mobile service had approximately 186,000 lines as of Dec. 31 with 4Q21 net additions coming in at 5,000. Churn has continued to drop and now lives around the mid-30s mark, and the company has plans to increase its promotional activity as it begins more aggressively moving forward with its rebrand of the Suddenlink brand to the Optimum name. “We think that we can mimic and do better than our peers over at **Comcast** and **Charter**, who are starting to grow their mobile subscriber bases nicely,” Grau said.

SPANISH-LANGUAGE VIX NEARING LAUNCH

With **Televisa** and **Univision’s** merger complete, the combined company—now going by **TelevisaUnivision**—is taking the wraps off its upcoming global streaming service for Spanish-speakers. The two-tiered offering features a free AVOD, **ViX**, and a premium SVOD, **ViX+** (no price details available yet) and will be available in most of Latin America as well as the U.S. and Mexico. ViX will launch on March 31, with ViX+ to rollout in the second half of the year. TelevisaUnivision promised the

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app would be available on “all major platforms” as well as vix.com. A beta version of the streaming app is available beginning today for select users in the U.S. and Mexico. Execs painted it as the perfect partner to the company’s existing television networks in the U.S. and Mexico. “When others are abandoning or de-emphasizing television, where others are looking to essentially reskin their television offering as a streaming service, we actually believe in the power of the television platform as an adjunct and as a complement to what we’re building in streaming,” CEO *Wade Davis* said during a press event Wednesday. “We are going to super serve the core viewers who love what’s on television. But it’s also going to enable us to access new audiences that are not having their needs met.” ViX will offer more than 50,000 hours of Spanish-language content, including movies, live sports, news and original series as well as an extensive amount of Televisa library content. ViX+ will premiere more than 50 original series and movies in its first year. What happens to **PrendeTV**, Univision’s less than one-year-old AVOD? Prende, as well as **Blim TV** and the legacy VIX AVOD service acquired in 2021, are being transformed into this one global app.

AMC NETWORKS TOPS 9M PAID STREAMING SUBS

In a year that included the acquisition of global anime content distributor **Sentai** and the **HIDIVE** streaming service, **AMC Networks** ended 2021 with more than 9 million paid streaming subscribers—growth of 49%—and a record full-year revenue of \$3.1 billion. The content company plans to continue its streaming expansion into India, Spain, Latin America and other European countries with target launches at the end of 2022 and into 2023. AMCN currently expects 400,000-500,000 net streaming subscriber additions in 1Q22, with a long-term goal of 20 to 25 million subscribers by the end of 2025. Interim CEO *Matt Blank* said during Wednesday’s 4Q21 earnings call that AMCN could reach the halfway point by the end of this year. By 2023, AMC Networks expects streaming to be its third-largest revenue business, and becoming the largest by 2025. Licensing revenue will decline over time as it utilizes exclusive content to drive subscriber growth. Domestic operations revenue for the year increased to \$2.6 billion compared to 2020, with subscription revenues increasing 15%. However, content licensing went down 4%, due to AMCN’s decision to not license original content to third parties. For the full year, advertising revenue increased 5% to \$845 million, while down 1% in 4Q. Internationally, distribution revenue for the full year improved to \$406 million as production delayed by COVID resumed, but fell 3% in 4Q compared to the prior year quarter.

DIRECTV STREAM COMPLETES PBS ROLLOUT

DirectTV Stream completed its nationwide rollout of **PBS** roughly nine months ahead of schedule. It began the process in October and has now added nearly 250 PBS member stations in 198 **Nielsen DMAs**. **YouTube TV** is the only other streamer to have announced a deal to launch PBS affiliates. As of late 2019, more than 100 PBS stations were streaming live on YouTube TV, but we haven’t seen any updates from either company on additional launches. Under the multi-year deal, DirecTV Stream is providing each stations’ full broadcast channels as well as the free PBS

VOD library. It’s also the presenting sponsor of documentary films “Becoming Frederick Douglass” and “Harriet Tubman: Visions of Freedom,” which will be broadcast nationwide this fall.

COMCAST ASKS WHY WIFI?

Nearly 347 million smartphones were connected on Xfinity home WiFi in the past year, a 23x increase compared to 2018, while overall **Comcast** connected nearly a billion devices to Xfinity WiFi. The company’s first-ever “WiFi Trends Report” found that fitness trackers and other health & wellness devices were the fastest rising connected devices, with 49 million connected—a 39x increase from 2018. Other stats: More than 10% of WiFi connected devices (119 million) were streaming video, 14x more than 2018; and gaming consoles connected to WiFi rose 15x to 36 million. Comcast said nearly 59% of Americans improved their WiFi connectivity last year with 28% upgrading equipment and 27% increasing connection speed. The survey was conducted by **Wakefield Research** among 1,000 U.S. adults in November.

HISTORY’S ANCESTRY-BACKED MINI-SERIES

A+E Networks announced a partnership with **Ancestry** to create a custom mini-series detailing stories of former enslaved African Americans. With archival data and conversations with descendants, each story features a relative of formerly enslaved African Americans and talks about the connection to President *Abraham Lincoln*. The series premieres Sunday during **History Channel**’s original documentary “Abraham Lincoln” and will be featured on digital and social platforms.

PROGRAMMING

“Fuller House” has a new linear home with **GAC Family** after **GAC Media** reached an agreement with **Warner Bros. Domestic Television Distribution**. Starting Monday, the full library of the show will air on GAC Family. The show’s predecessor “Full House” began airing on the channel in early February. – **HBO Max** renewed “Peacemaker” for a sophomore season ahead of Season 1’s finale on Thursday. – Eight home cooks will compete for a three-month all-expenses paid trip to a cooking school in Paris in “The Julia Child Challenge.” It’s the first primetime competition series dedicated to Julia Child, and the contestants will find themselves in kitchens that were recreated to mimic the same places Child herself cooked. The series will premiere March 14 at 9pm on **Food Network** and stream on **discovery+**.

PEOPLE

Tracey Kopper-Hourin was named SVP,HR and Customer Experience at **Comcast Advertising**. She moves over from **FreeWheel**. – *Sue Kelly* joined **Hotwire Communications** as the Regional EVP & GM overseeing all business development across North Carolina and South Carolina. She’s spent more than 20 years in the industry, including various roles at **Time Warner Cable**, **Spectrum** and **Cox**. She most recently was SVP, Enterprise Sales for fiber optic network designer **FiberLight**. Hotwire also added *Roddy Broadnax* as VP, Business Development for the Carolinas Region, tasking the former **Logix Fiber Networks** and **Spectrum Enterprise** exec with identifying new opportunities in the area and building the Business Development Enterprise Team.

Think about that for a minute...

For The Old Folks

Commentary by Steve Effros

It's certainly no secret that as we get older, things don't work as well. That goes for our eyes, our ears, our joints, and, yes, our brains and lots of other things that I won't go into here. We'll just stick to eyes, ears and brain.

I usually try to pick a subject each week that's not being written about by a whole host of other folks, but we all have such short memories these days you might forget by next week what you watched last Sunday during the Super Bowl. Now I know that all of you didn't watch the Super Bowl, but given that approximately 112 million people did, I think it's a safe bet that a lot of you will know what I'm talking about.

112 Million is not a record, they missed by about two million (the 2015 game between the Patriots and Seattle) but that's still a whole lot of viewers. And given that the American population of 18 to 34 year-olds is just half that, wouldn't you think that some of the ads, I mean at least some of them, would have been designed so that us older folks would at least understand what the ad was for?

I know I'm not alone in this, because two other older folks (60 and above) were watching the game with me and we all repeatedly had to ask each other what most of the ads were about, or why the "creative" department thought they would impress us with some reference or "celebrity" we didn't know!

I've mentioned this sort of thing before in this column, particularly referring to the print media which just can't seem to understand that if you insist on making the font sizes smaller and smaller and printing light gray text on pink backgrounds, for instance, you're going to lose a significant part of the audience. We can't read that stuff!

Now I'm sure the retort will be that the ads are really aimed not at us old folks, but at the "young" audience, the ones you want to get hooked on your particular product. But hey, look at the stats! The "old folks" are the ones with the money!

I know, this is a losing cause. All I read about is analysis of the Super Bowl ads and how well some of them did. The "QR

code" ponging around the screen for thirty seconds (\$6.5 million bucks on average for a 30 second spot). I have to admit it never occurred to me to quickly pull out my handy dandy cell phone and "capture" a shot of the code so I could be whisked to a web site offering bitcoins!

But then again, I have yet to see an ad, or even a decent article explaining what the heck bitcoins are, and why we should throw money at cryptocurrency, let alone Non-Fungible Tokens. Yup, I'm old.

However, listen up you young creative types and new-business entrepreneurs; you still need us! Stop with all the ads that only have references a less-than-20-year-old will understand, talking at a speed we can't decipher. Make sure that some of the "celebrities" you use in your ads (I've never understood why I should listen to a "celebrity" about car technology or anything else in the first place) are folks we either recognize or at least know their name!

And when it comes to the really new companies (yes, I know about the Clydesdales...) it would really be nice if you told us who you are and what you are offering in more than a three second flash on the screen at the end of that multi-million dollar ad!

Ok, I've said it. Don't think it will make much difference, but I just felt someone had to.



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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