

# Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

## Mixed Messages: Fiber Connect Crowd Ponders Future of Video

Moments after a **Xperi/TiVo Fiber Connect** keynote on the advantages of broadband operators offering video, a panel of operators took the stage and presented a much more dismissive view of the triple-play offering.

“As a cooperative, we still carry the triple-play. The thing about it is, consumers are evolving away from it. They still want the triple-play services, [but they are consuming it either through a mobile device or online over-the-top-type video,” said *Jimmy Todd*, CEO and GM of **Nex-Tech**, a rural cooperative based in Lenora, KS, that was the first company in the nation to bring FTTH technology to an entire rural telecom exchange. “Even though we see that transition from three revenue streams to one, with just the broadband being the focus, there’s still a requirement for us to [offer the triple-play]. If we didn’t have that requirement, we would probably be transitioning to a different focus, primarily with broadband... The video piece is really moving toward the cloud and over-the-top.”

The question of whether or not to dive into video is important with many Fiber Connect attendees new entrants in the fiber provider space. TiVo Pay TV Business GM *Kevin Lenhart* acknowledged that offering video isn’t easy, but possible with the right partners. “As you’re starting to think about your video services or how they might potentially impact your own business models, talk to the right people, get the right support from groups like **NCTC**, get the right support from folks like

TiVo or others... Lean in toward solutions that can be more managed, more turnkey, and facilitate a very rapid stand-up and get you to the point where [there are] real opportunities to add subscribers very quickly,” he said.

Consumers are leaning in on SVOD and AVOD services, but they’re also mixing and matching with traditional video. “I think the truth is probably right down the middle—to be successful, you need to be able to integrate it all,” *Lenhart* said.

**Google Fiber** has been transitioning away from offering TV since 2020. “With an increasing number of kind of these Generation Z’ers entering and getting more buying power in the market, they wanted the power to choose and pay for what they use. With the increasing number of streaming and OTT options on the market, it really opened up the door for them to have that power to choose and pay for exactly what they want to use,” said *Ashley Church*, Google Fiber West Region GM.

As **Frontier** sets out on its major fiber upgrade, it’s relying on partners like **YouTube TV** and **MyBundle.TV** to help consumers find and connect to streaming video options. “Our approach is certainly to support those that are there [on legacy video] and we’d like to transition those if we can over to this new approach,” said *Reed Nelson*, Frontier’s Senior Director of Construction & Engineering.

Is Frontier offering an incentive for traditional video customers to cut the cord? “We are working through that as we go right now. Our head is down because as I’ve mentioned we have to move pretty aggressively to pass 6 million homes by



## THE CONVERGENCE OF CHANGE CULTURE & INNOVATION

Join 550+ industry HR pros for a dynamic learning experience!

Keynote: Lisa Sun of Gravitass

REGISTER NOW >> [c2hrcon.org](https://c2hrcon.org)

the end of 2025,” Nelson said.

TiVo’s take is that a future-proof network needs to consider all options, including video. “We don’t all perfectly understand 10 years from now the different content services, or even types of video or types of experiences on the entertainment side that people will be looking to enjoy,” Lenhart said. “So as you think about how do you invest, how do you select technologies—choose ones that are flexible. Choose ones that bring in an ecosystem of solutions, and choose ones that have very committed partners that are willing to invest in and grow those solutions over time, so that you continue to remain very competitive.”

Tuesday’s Fiber Connect opening session panel also delved into the use case for multi-gig internet speeds, citing everything from precision agriculture to gaming. “We’re projecting a 5x increase on data consumption from 2021 through 2025. And the last couple of years, we’ve seen evidence of that with a pandemic. There’s no evidence that suggests it’s going to slow down in the next couple of years,” said **AT&T** VP, Integrated Broadband Build Planning *Chris Altomari*. “The average customer in our network is consuming around 400 gigabits a month of data. That’s the average user, which is about 15 devices... Imagine what the upper quartile user is doing. And so fiber is the answer.”

#### APPLE WINS MLS SOCCER RIGHTS

Another brick in the wall insulating traditional pay TV providers from digital disruptors has crumbled. **Apple** and **Major League Soccer** announced a deal Tuesday that will make the Apple TV app the exclusive place to watch every live

MLS match from 2023-2032. League executives told [Sports Business Journal](#) the agreement isn’t for a straight fee for the rights. Instead, Apple is paying a minimum guarantee. SBJ reported the guarantee is worth \$250 million on an annual basis. The programming lineup will also include Leagues Cup coverage and select MLS NEXT Pro and MLS NEXT matches without local broadcast blackouts. **Apple TV+** subscribers will have access to a broad selection of the MLS and Leagues Cup matches and a limited number of matches will be available for free to all Apple TV app users. Otherwise, access to a new MLS streaming service with the matches will be subscription-based. It will also be included as part of MLS full-season ticket packages. Details about the subscription pricing, match schedules, production enhancements and pre- and post-game coverage will be released in the coming months.

#### WILL DISH OR WON'T DISH?

Today is the deadline for **DISH** to cover 20% of the national population with its wireless network, per its **FCC** obligations. If it completely misses the deadline and doesn’t achieve the goal across all three of its spectrum bands, the maximum penalty it could see is \$200 million. We haven’t received any announcement from either DISH or the agency indicating whether or not that goal has been met, but New Street Research remains confident that it is highly likely the coverage requirement has been met. According to Genesis5G.com, DISH’s service is live in more than 120 cities. Markets that have been turned on include Albuquerque, New Mexico; Charlotte, North Carolina; Columbus, Ohio; El Paso, Fort Worth and Houston in Texas;

# Help Save Lives. Donate Blood.

Schedule at [RedCrossBlood.org](https://RedCrossBlood.org)



## American Red Cross

Cablefax Daily (ISSN 1069-6644) is published daily by Access Intelligence, LLC | [www.cablefax.com](http://www.cablefax.com) | 301.354.2101 | Editorial Director: Amy Maclean, 301.354.1760, [amaclean@accessintel.com](mailto:amaclean@accessintel.com) | VP/Group Publisher, Cablefax and Cynopsis: Robbie Caploe, 917.974.0640, [rcaploe@accessintel.com](mailto:rcaploe@accessintel.com) | Managing Editor: Sara Winegardner, 301.354.1701, [swinegardner@accessintel.com](mailto:swinegardner@accessintel.com) | Associate Editor: Noah Ziegler, 301.354.1704, [nziegler@accessintel.com](mailto:nziegler@accessintel.com) | Director of Business Development, Cablefax: Ellen Kamhi, 917.626.5574, [ekamhi@accessintel.com](mailto:ekamhi@accessintel.com) | Dir of Marketing: Kate Schaeffer, [kschaeffer@accessintel.com](mailto:kschaeffer@accessintel.com) | Production Manager: Joann Fato, [jfato@accessintel.com](mailto:jfato@accessintel.com) | Kerry Smith, Divisional President, Marketing & Media Group, [ksmith@accessintel.com](mailto:ksmith@accessintel.com) | Group Subs/Subscription Questions, Client Services: 301.354.2101, [clientservices@accessintel.com](mailto:clientservices@accessintel.com) | Annual subscription price: \$1,799.00/year | Access Intelligence, LLC, 9211 Corporate Blvd., 4th Floor, Rockville, MD 20850

Indianapolis; Kansas City, Kansas; Norfolk, Virginia; Nashville; and Oklahoma City, Oklahoma. If DISH has met its goal, it will have turned its eyes to the next deadline: June 14, 2023. It has to cover 70% of POPs across the U.S. at that point, which New Street estimates will require 17,000 cell sites. “We assume the majority of sites required to meet this deadline are in process already,” it said in a Tuesday note.

### FIBER CONNECT NOTEBOOK, DAY 2

**Fiber Broadband Association** chief *Gary Bolton* has a message for cable operators: You’re more than welcome at **Fiber Connect**. “We really want to make sure the cable industry feels very welcome. We’re moving beyond talking about what the facility is and really moving into what really matters, and that’s delivering good content and really delivering great customer service and improving Net Promoter Scores,” he told **CFX**. There were more panels on the conference’s agenda this year that dealt with the combo of HFC and fiber. Next year, the conference is set to focus on what fiber disrupts next. Fiber Connect 2022 had 187 exhibitors, with 93 companies on a waiting list that had to be turned away, Bolton said. He said attendance for the show is looking to be about 50% higher than last year, which had a record 2,041 attendees. New audiences this year included more press and analysts, as well as cable operators and WISPs. – **Pew Charitable Trusts** Project Director of Broadband Access Initiative *Kathryn De Wit* warned that anti-fiber bills are hitting state legislatures. She called on Fiber Connect attendees to advocate on why fiber is a better investment. “Universal, affordable access is no longer a nice talking point. It is where we’re getting to, and moreover, we have a preference for fiber because we are no longer building to the ceiling,” she said. “We are starting at the floor and building the infrastructure that will support us for a decade plus into the future.”

### SWEET LOU ON ‘TODAY SHOW’

There was a familiar face on **NBC**’s “Today Show” Tuesday morning. During a [segment](#) on summer reunions, the crew surprised Today Show hosts with high school and college friends. *Al Roker*’s surprise guest was none other than **NCTC** President/CEO *Lou Borrelli*, a fellow SUNY Oswego alum. Roker said “Sweet Lou” was his mentor, laughing that he looks older than Borrelli, even though the reverse is true.

### DIGITAL SKILLS TRAINING WORKS

Nearly 80% of individuals that have received digital skills training and accessed the internet with the help of a trusted community member are satisfied with those services, according to the latest research from **Boston Consulting Group**. The study, commissioned by **Comcast**, surveyed more than 1,500 people who utilized services offered by individuals affiliated with trusted community organizations that are trained to help people get connected. More than 85% of respondents said they used the internet more frequently through the training and 65% said they obtained internet access or a computer or tablet at home with the support of these workers. Better

yet, almost half were able to obtain better healthcare and 40% were able to find additional support for food, rent and housing.

### XFINITY PRIDE

**Comcast** is enhancing its LGBTQ Film & TV destination in honor of Pride Month, introducing a live shopping event designed to help promote and sell products from LGBTQ+ owned companies. The event, scheduled to take place Wednesday, will be accessible via Comcast’s Xfinity Watchwith livestreaming app and will be hosted by Bravo personality *Daryn Carp*. Users will be able to purchase products from gender neutral clothing brand Stuzo and Roverlund using **NBCUniversal** Checkout. Comcast is also adding an interactive history of LGBTQ+ representation in entertainment to its Pride destination with 36 milestones across networks, studios and streaming services.

### TELEMUNDO PARKS IN MEXICO CITY

**Telemundo** is opening a new production unit in Mexico City that will operate a Telemundo Global Studios Mexico. The arm will grow the company’s on-the-ground production capabilities of scripted and unscripted Spanish-language content. It is currently in pre-production on its first project for the network, the eighth season of the “El Senor de los Cielos.”

### HONORS

**Firstlight Media** is the recipient of the 2021 Google Cloud Industry Solution Partner of the Year Award for Media & Entertainment. The company, which specializes in cloud transformations and in-home experience for MVPDs and telcos, was celebrated for driving customer success in new markets and laying the groundwork for innovations that will expand technical and product capabilities for OTT and Google Cloud.

### PROGRAMMING

**Lionsgate** and **Tubi** entered into a multi-year slate deal that will see 30 new films come to the AVOD platform. The partnership also includes more than 200 titles that will be added to Tubi’s library. – **Discovery**’s 34th annual Shark Week is taking over its linear network and **discovery+** starting July 24. – **CNN**’s “United Shades of America with W. Kamau Bell” will come back for a seventh season on July 10 at 10pm. – The second season of **HBO Max** dating series “FBOY ISLAND” will debut its first three episodes on July 14. Those will be followed by the release of three additional episodes on July 21, two on July 28 and the final two on Aug. 4. – Preschool show “Bugs Bunny Builders” arrives on **Cartoon Network** at 8am on July 25 as part of its Cartoonito programming block. It will also be available on HBO Max starting on July 26. – Peacock will debut “Downton Abbey: A New Era” on June 24. The return of the franchise will reunite many members of the original cast, including *Michelle Dockery*, *Maggie Smith* and *Hugh Bonneville*. – **NewsNation** is expanding its live morning news programming with “Early Morning,” a one-hour show coming June 27 at 6am. *Mitch Carr* will anchor the broadcast and *James Holm* will serve as executive producer.