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WHAT THE INDUSTRY READS FIRST

Broadband Bull: Comcast's Roberts Keen on Stream, Unveils XiOne

Brian Roberts' annual appearance at the Goldman Sachs Communacopia conference helps set the tone for what's ahead not just at **Comcast**, but for the industry as a whole. It's clear from his remarks on Wednesday that he's all in on deepening Comcast's relationships with its 31 million broadband customers—whether that's through better WiFi in the home, aggregating streaming video, bundling in the Xfinity Mobile service, and so on. The key to taking things to the next level is DOCSIS 4.0.

"What you did with your broadband 10 years ago is virtually unrecognizable today—what we're doing right now with bit streaming video, or streaming television, business, commerce, education," Roberts said. "So, 10 years from today, I believe broadband will be just as unrecognizable. And if you had to place a bet, you probably could say it'll happen faster, not slower than the pace of change the last 10 years before that."

His comments came one week after Comcast CFO *Mike Cavanaugh* spooked investors by warning at another investor conference that 3Q21 sub additions are down about 10% vs the comparable quarter in 2019. Roberts didn't address those fears directly, but he made several points that might ease Wall Street's concerns:

"I think we've built an incredibly unique, different and special company. The last couple of years, I think first of all demonstrates we're in good businesses, but also how scale matters. If one business is going down, for some temporary

hit from COVID, we had others that were surging."

- "I think [our broadband investment is] what makes Comcast NBCUniversal a different story, and a different stock than many others. Because we're powering streaming, regardless of whether it's our own... [and] we're integrating those apps with our own platforms."

- "We're not getting any surprises, in our mind, from... competition."

The Comcast CEO's 45-minute appearance covered a lot of ground, including how the company balances investing in sports rights with their high cost. "We have to pick and choose," he said. "We look at what **NBC Sports** does extremely well... and they make big events." That includes Sunday Night Football and the Olympics. And it means letting streaming in on the action. "Having the opportunity to have these [NFL] games on **Peacock**, at the same time as NBC, brings in new audiences, people who are not in the traditional ecosystem. We're seeing a real, wonderful win-win," Robert said.

He conceded that the Olympics had a tough go because of the delay and pandemic, but viewers still consumed more than 120 billion minutes of the Tokyo Games. "It really makes our company super relevant for those 17 days. And no one quite can compete with advertisers for attention in a way that the Olympics can," Roberts said.

Comcast has a history of using the Communacopia conference to tease new products, from new routers to the launch of Xfinity Mobile. During Wednesday's event, Roberts announced



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the launch of XiOne, its first global streaming device for Xfinity and Sky customers as well as syndication partners. The 4K UHD, WiFi 6 offering is currently available in Italy and Germany to Sky Q customers and will begin to rollout in the US.

New Flex customers will be the first in the States to get the device, with X1 customers eventually eligible to receive it. XiOne has more memory than the current Flex device, the Xi6. It also supports HDR, Dolby Vision, and Dolby Atmos and comes with a simpler, smaller voice remote designed with streamers in mind.

CABLE SAYS NO REDLINING HERE

The broadband love fest continued Wednesday with NCTA releasing a report that found cable providers are equally deploying their fastest services to communities regardless of income level or race. You can bet that's information cable wants Congress to keep in mind as it doles out federal funding for further broadband support... Analyzing FCC and Census Bureau reports, the association found cable broadband providers offer gigabit service to 91% of urban households in low-income areas (household income below \$30,000), as compared to 94% of all middle-income households and 90% for areas with the highest income households (above \$90,000). Cable operators offered gigabit service to 92% and 94% of households in areas with the highest percentage of African Americans and Hispanics, compared to 92% and 93% of households in areas with the lowest percent of African Americans and Hispanics. NCTA found that over the past decade, low-income broadband programs from cable operators have connected more than 14 million Americans. These programs offer service for as low as \$9.95 to \$17.95 a month, and often include access to free or low-cost devices and digital

literacy training. To date, the cable industry has spent over \$650 million on digital literacy and training efforts.

VIACOMCBS PLOTS THEATRICAL STRATEGY

ViacomCBS CEO Bob Bakish said his company has gotten its streaming content strategy down to a science—and that includes strategizing theatrical windows. While movies like “A Quiet Place Part II” released theatrically and then on Paramount+ after 45 days, Bakish likes a same-day theatrical and streaming release strategy for family movies like “Paw Patrol.” Lower-budget films will have streaming-exclusive releases. “It’s not that we’re going in one direction for every film, we’re actually using a strategy which has a range of tactics designed to maximize the value of film across this now broader ecosystem. But as we do that, theatrical definitely still matters,” the exec said at an investor conference Wednesday. ViacomCBS isn’t leaving sports out of the streaming formula, though, especially with NFL and soccer. “If you actually look at last week, when the latest UEFA Champions League season started, we have the two largest streaming days ever for soccer on this. So we like that piece of business,” Bakish said. The CEO was all compliments when asked about last week’s decision to add Paramount CEO to Nickelodeon president Brian Robbins’ title. “Brian Robbins is a content creator, he’s a franchise builder and he’s a collaborator, which to me is an incredibly compelling combination of talents,” he said. “You look at his resume and he has a broad and strong content track record...I think, equally importantly, he really understands and value’s today’s multiplatform world.”

MR. ANTENNA STILL FIGHTING BROADCASTERS

Outdoor TV antenna vendor Mr. Antenna isn’t backing down from its FCC objection to the transfer of Meredith Corp’s KVVU-

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TV of Henderson, Nevada, to **Gray TV**. The broadcasters have blamed a miscommunication for Mr. Antenna being told that KVVU would no longer accept advertising from vendors whose products presented a 'cord-cutting' alternative to cable service, with Meredith adding that station GM *Michael Korr* quickly followed up to let Mr. Antenna's owner know the station was more than willing to accept the company's ads. "It is difficult to imagine what Mr. Korr might have said such that his sales staff 'misinterpreted [his] directions as indicating that such a policy existed,'" Mr. Antenna said in follow-up comments filed at the FCC this week. "One can reasonably infer that his 'directions' related to sales. The directions obviously would have involved some reference to advertisers that promote cordcutting. Otherwise, there would have been no operative words for the sales staff to misunderstand." The vendor argued that the FCC can't resolve the issue without cross-examining Korr and said it would be appropriate to hold a hearing to determine the facts. Gray has a pending \$2.285 billion deal to acquire Meredith's broadcast stations. If the FCC grants Gray's acquisition, Mr. Antenna wants a condition that Gray will not issue an ad policy against cordcutting. Alternatively, the company suggested the FCC could require Gray to devote a set amount of time ("perhaps five minutes per month") to PSAs encouraging viewers to access Gray station programming over-the-air.

TV VIEWERSHIP SOARING

As the pandemic (maybe) starts to slow down, there seems to be no change in the trend of increased traditional TV viewership. Cable accounted for the highest share of time spent viewing with 70% versus broadcast and premium networks, according to research from **Effectv**, the ad sales division of **Comcast Cable**. That's up 3% YOY. Comcast households also saw a continued trend in the shift towards live TV that began in the second half of 2020, accounting for 88% of daily viewership. However, there was a 32-minute YOY decrease in live viewing for the first half of 2021, the first YOY decline for the metric since data recording began, Effectv found.

CARRIAGE

Black-owned television, digital and social media platform **Polaris** is launching its first FAST channel, set to debut on **VIZIO SmartCast's WatchFree+** in October. Polaris programs to appear on the channel will include "The Daily Check In," "Bridge Business" and "Method To The Madness." Polaris is aimed at covering and sharing stories from BIPOCs. – **MAVTV Motorsports Network's** streaming channel, MAVTV Select, is now available on **Pluto TV**. The streamer's racing lineup will include coverage of the American Sprint Car Series, Late Model Dirt Series, Pro Pulling League, ARCA Menards and more.

LIBERTY GLOBAL SELLS POLAND OPS

Liberty Global agreed to sell 100% of its operations in Poland to **Iliad S.A.'s** Polish subsidiary **Play** for \$1.8 billion. Liberty's UPC Poland passed 3.7 million homes and served 1.5 million customers at the end of 2Q21. Iliad Group currently has over 15 million subscribers to its Polish mobile network operator Play. Proceeds from the sale, net of debt repayment at the UPC bank group, are

expected to be used for general corporate purposes. That may include support for the company's multi-year buyback commitment. Liberty Global agreed to provide certain transitional services for Play for up to four years, including network and information technology-related functions. Once this transaction closes, Slovakia will be all that's left of Liberty Global's Central and Eastern Europe operations. It sold its Hungary, Czech Republic and Romania properties to Vodafone in 2019 for more than \$21 billion.

FOOTBALL RATINGS BUMP

NFL Network returned to the Top 5 cable nets in prime last week thanks to "Thursday Night Football." The channel averaged 1.145 million viewers in prime, putting it in fourth place. **Fox News**, again, took the crown in prime and total day (1.483 million and 2.659 million viewers, respectively). It's early, but there's positive signs for football. The **NFL** has garnered 17.7 million viewers across TV and digital platforms season-to-date. That's up 14% YOY and the highest average through Week 2 in five years. NFL games have ranked as the top 11 telecasts on TV for the season-to-date. Week 2 delivered 16.5 million viewers, up 12% YOY on television and digital platforms and also the highest Week 2 viewership since 2016. – **Hallmark Channel's** premiere of "Raise a Glass to Love" Saturday averaged 1.8 million total viewers, 1.6 million households and 197,000 W25-54, making it the number one most-watched entertainment cable program of the day and movie of the week among total viewers, W18+ and households. The film also made the network the number one most-watched entertainment cable network that day and in weekend total day among W18+ and households.

PROGRAMMING

Showtime gave a series order to drama "Let the Right One In," set to begin production in NYC in early 2022. It is inspired by the Swedish novel and film of the same name. – **GAC Family** added three additional movies to the "Great American Christmas" programming lineup. "The Great Christmas Switch" premieres Nov 6, "Royally Wrapped for Christmas" debuts Nov 27 and "Christmas is You" launches Nov 28. All movies will debut at 8pm on their respective premiere dates.

PEOPLE

Connie Luck, regional senior director of government affairs at **Charter**, was elected to the **Broadband Cable Association of Pennsylvania's** board. She'll serve a three-year term on the 16-member board. BCAP is the nation's first state cable trade association.

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Think about that for a minute...

The Messenger

Commentary by Steve Effros

The Wall Street Journal recently ran a five-part series of articles on Facebook based on leaked internal documents. They have been described as “blockbusting” and pointed to as evidence that the folks at Facebook simply don’t care about the negative effects they knew were ascribed to their service. The revelation getting the most attention seems to be that Facebook was diligent and actually spent a lot of money and time researching the adverse effects of their social media juggernaut, but didn’t “do anything” to “fix” what they learned.

At the top of the list: that teenage girls reported anxiety, depression, social pressure and particularly harmful negative body image related to the use of Instagram, one of Facebook’s dominant platforms.

Now I am certainly not an apologist for Facebook or its leadership. I have long written about my concerns regarding the incredible power of the medium we have created and the increasing dominance of several of the companies involved, particularly Facebook and Google. However it seems to me that some of the expressed outrage associated with the Journal series, such as folks likening Facebook to “big tobacco,” is misplaced.

Let’s start with the fact that companies doing research about how their products are used and the apparent good and bad news associated with that is certainly nothing new, and should be lauded, not lambasted. For instance, if the sugar cane industry had done that research years ago and “done something” about it, we may not have had the epidemic of diabetes we see in this country today.

That Facebook documented the problem of teenage reaction, particularly of girls, to the issue of body image is a good thing. What, exactly, they are supposed to do about it is not so simple. Sure, that research should have been shared. But to suggest that this is a new issue or one that is unique to this new social media messenger is disingenuous.

Doesn’t anyone remember Daisy Mae from the Li’l Abner comic strip (it started being published in 1934)? Did Al Capp and Simon and Schuster not know, from ‘34 to 1977 that the full breasted,

short skirt, vanishingly small waisted girlfriend of Li’l Abner might affect the image young girls might have of themselves? How about Wonder Woman (1942)? Did DC Comics do any studies to determine how her portrayal and outfits might have affected the teenage girls of that era?

This is not to say that those portrayals were OK. The harms that Facebook has now documented are real and the misogyny that reverberates needs to be dealt with. We are finally getting to the point of saying so out loud. That’s good. The same thing is true of challenging the systemic nature of warped treatment and history of minorities. That’s good too. But the thing that needs to be remembered is that it’s not the messenger or the technology that has fostered these things. Those harmful messages have been around for a long time, they’re just being delivered more efficiently today.

So yes, Facebook needs to try to figure out what to do about the effect Instagram is having. But more importantly, we all need to put a spotlight on the underlying issues that have been either ignored, or intentionally hidden for a very long time. It’s a mistake to focus just on the technology or the particular messenger in this case. The “fix” isn’t going to be accomplished by focusing on one particular company or technology. It’s the message, not the messenger which needs fixing.

My wife and I visited Sicily years ago, and went to the Villa Romana Del Casale in Piazza Armerina; an ancient Roman Spa with totally preserved tile baths. They clearly depicted bikini-wearing, well endowed women playing what we now call Frisbee! Don’t blame the messenger, it’s the speaker we have to deal with!



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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