

# Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

## X Factor: Charter Launches Xumo Stream Box, Comcast to Follow

Comcast and Charter made good on their promise to roll out a Xumo product in 4Q23, holding a splashy event in NYC on Wednesday to announce the nationwide rollout of its first streaming device. The Xumo Stream Box is launching first in Charter Spectrum households, while Comcast expects to bring it to Xfinity homes “soon.”

New Charter video customers receive one Xumo device for no cost for the first year and can purchase additional boxes. Thereafter, and for additional devices, they can either pay \$60 for an outright purchase, or pay over 12 months for \$5/month. The box is available to existing Spectrum customers as well as new. Internet-only customers can also purchase boxes.

Comcast isn't offering a date for its launch. It plans to offer the Xumo Stream Box to Xfinity internet customers in the same way Flex is today, ie, no additional cost for the device as part of their monthly service, with customers able to run either Xfinity Stream or Xumo Play on the box. It's not clear yet if existing Flex box users will be able to upgrade. Xumo Play supports more than 300 FAST channels, while Xfinity Stream incorporates linear channels, including the 40 in Comcast's \$20/month Now TV package. Additional operators for the Xumo Stream Box will be announced shortly, according to execs.

The idea behind the joint venture, powered by Comcast's Entertainment Operating System, is to make it easy to stream content no matter where it resides. “With all the complexity and consumption

of content and TV, somebody needed to make TV easy again and make the experience simple,” Xumo President *Marcien Jenckes* told attendees at the launch event.

Perhaps the most interesting tidbit came from Xfinity Chief Product Officer *Fraser Stirling*, who spoke briefly about what's next for Xumo. “TV is awesome, but it's not just TV. It's more than TV. It's video streaming, music streaming, cloud gaming and fitness,” he said. “These are all services of entertainment that people engage with and spend their time with and can go through a single stream box in the future to bring all these worlds of entertainment to you in one place.”

Charter President of Product & Technology *Rich DiGeronimo* summed up why Charter is participating in the jv. “We want to still participate in the video business, even as this industry is evolving at a rapid pace. Even though traditional video viewership is in a state of decline, streaming viewership is significantly up and Charter wants to be able to participate in that,” he said. “The second reason is we want to be able to leverage our sales and marketing capabilities to distribute this independent retail platform for our video customers, but also for our internal lead customers because we can now participate through the venture in the monetization of third-party apps [which could include advertising, placement and revenue sharing].”

The Xumo box's aggregated search works across apps, while also serving up curated content based on a customer's interests and subscriptions. This is why Charter insisted on a deal with **Disney** that included its direct-to-consumer apps for its video custom-



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ers. Content recommendations come from a blend of “AI-driven personalization and human-led editorial recommendations,” the companies said.

DiGeronimo offered up an example of the kind of search problems the Xumo experience can help solve by throwing out how Michigan Wolverines football has traditionally been on **ESPN** or **Fox**. But this year, the first game was available exclusively on **Peacock**. Game 2 was on **CBS**, Game 3 was on **Big Ten Network**, then it went to Fox and then it's available on **NBC** and Peacock.

What does this Xumo experience look like? At startup, customers see live video playing from the device's primary video service app such as Spectrum TV, Xfinity Stream or Xumo Play. A built-in channel guide allows users to browse through subscribed channels. Xumo features access to hundreds of subscription-based and ad-supported streaming apps, including **Apple TV+**, **Disney+**, **Hulu**, **Max**, **Netflix**, Peacock, **Pluto TV**, **Prime Video**, **Tubi** and Xumo Play. Other features include a remote with voice search and favorite lists that span content services for every member of a household.

The companies held Wednesday's launch event at the newly opened GH on Park overlooking Bryant Park (the venue occupies the historic building originally constructed in 1902 for the National Republican Club). There was a full gaggle of media reporters in attendance, along with a few programming execs, plus Charter and Comcast employees.

Xumo Devices is the newest part of the Xumo business, which also includes DTC app Xumo Play and **Xumo Enterprises**, a division enabling the creation of FAST channels for partners. Xumo Enterprises powers 850 FAST channels in 170 different countries, according to Jenckes. The Xumo Device division includes Hisense smart TVs powered by the Xumo TV platform. Just last week, Best Buy announced it will add Xumo TV models from Pioneer next month that range in price from \$270-\$500. The Xumo smart TVs are the evolution of the XClass TV trial Comcast launched a little over a year ago.

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## AI RULES OF THE ROAD HOPEFULLY COMING SOON

NTIA Administrator *Alan Davidson* is a strong believer in the idea that responsible AI innovation is going to do amazing things to make people's lives better, but that can only happen if the real risks and concerns about the use of AI are also addressed. That's what he told **Center for Democracy & Technology** President/CEO *Alexandra Reeve Givens* in a fireside chat Wednesday. NTIA put out a request for comments to understand what policies could support the development of AI audits, assessments, certifications and more to create earned trust in those systems. The agency received more than 1,400 comments in response, and it plans on having a report out before the end of the year addressing those

## The **WHO** and the **WHY**

CFX's spotlight on recent new hires & promotions



MARK

**Garner**

EVP, HEAD OF GLOBAL FAST CHANNELS  
A+E NETWORKS

### 3 THINGS TO KNOW

- To meet the growth of the overall FAST channel space, A+E Networks created a new role for Mark to take on. He was previously EVP, Global Content Partnerships and Business Development and will now grow his role to further focus on ramping up A+E's FAST business both in the U.S. and internationally. Mark will report to President, Global Licensing & International Steven MacDonald.
- A 23-year mainstay at A+E, Mark first joined the company as VP, Regional Distribution for Lifetime Networks, overseeing sales and distribution for the eastern U.S. and Caribbean regions. Prior to A+E he made stops at MTV Networks, Pacific Bell (now AT&T) as well as several start-up ventures including a satellite broadcast network in South Africa.
- Mark has been active in numerous associations. He's currently a board member of MIPCOM's Diversity & Inclusion Group and was previously on the boards of NAMIC, CTAM, Black News Channel, the South Orange Performing Arts Center and The Digital Entertainment Group.

concerns. “People are eager to understand what good looks like here,” Davidson said. “That’s where I think that government can be a big help, by giving an indicator whether it is through codes of conduct or through actual regulation.” NTIA’s report will cover a broad array of AI-related topics, but there’s no doubt there is a major focus right now on the promises and pitfalls of generative AI. *Duncan Crabtree-Ireland*, **SAG-AFTRA**’s National Executive Director and Chief Negotiator, said during an **FTC** workshop on AI in creative fields that the union is not at all opposed to new technologies or even the use of AI. For SAG-AFTRA, the key to moving forward cooperatively is ensuring that companies using AI technologies are required to get the informed consent of any individuals whose voice, likeness, performance, persona or intellectual property is being used to generate content. He also believes companies need to compensate individuals fairly. “What we’re proposing is about keeping our world and our industry human-centered,” he said. “AI and its algorithms must be here to serve us, not the other way around.” **WGA** Negotiating Committee member *John August* also made an appearance, and he believes the agreement WGA struck with **AMPTP** could offer helpful guidance when thinking about the future of public policy related to AI. “Our agreement defines that

AI is not a writer and the material it generates is not equivalent to human writing for purposes of our contract,” he said. “That means that AI cannot rewrite us nor can it compete with a human writer for credit and the associated financial benefit of that credit.”

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## VANTIVA BUYS COMMSCOPE'S HOME NETWORKS GROUP

**Vantiva** (formerly known as **Technicolor**) is acquiring **CommScope's** Home Networks division, a branch of the company that includes its residential connectivity and set top box offerings. As part of the deal, CommScope will receive a 25% stake in Vantiva on a fully diluted basis as well as a maximum cumulative earnout of \$100 million in cash contingent upon Vantiva achieving an EBITDA equal to or exceeding €400m in a given fiscal year over the five years following the first full year after closing. CommScope will also have one representative join Vantiva's board. Vantiva plans to fully integrate the division into its Connected Home division to increase its footprint in key geographies and expand its portfolio of clients. The transaction is expected to close late in 4Q23.

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## PRIVATE INVESTOR LOOKS TO PROVIDE LETTERS OF CREDIT

Privately-held investment firm **The Avery Companies** is looking to get a piece of the BEAD pie, announcing a new initiative to provide financing solutions and letters of credit to rural broadband providers that meet the needs of federal or state subsidy programs. Applications for the BEAD program are required by **NTIA** to come with a letter of credit for 25% of the grant amount. The Avery Companies hopes its involvement will facilitate infrastructure development, improve service quality and accelerate the expansion of broadband to remote areas.

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## LRG: PAY TV SERVICE IN HOUSEHOLDS CONTINUE DECLINE

The percentage of TV households in the U.S. that have a live pay TV service continues to decline. Data from **Leichtman Research Group** shows 64% of households have a live TV service, whether it be cable, satellite, telco or vMVPD. That's down from 78% in 2018, 856% in 2013 and 87% in 2008. In those TV households, 70% of adults above 45 years old and 56% of people aged 18-44 have a pay TV service. The average age of traditional pay TV subscribers is 49.3, whereas the mean for non-subscribers is 42.5 and 40.8 for those with a vMVPD service. The average reported spending per month across all pay TV subscribers came in at \$112.70—a 5% increase from 2018. LRG surveyed 1,769 households throughout the U.S. as part of its new “Pay-TV in the U.S. 2023” study.

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## SHENTEL QUICKENS GLO FIBER BUILD WITH RENDER

**Shentel** is teaming up with geospatial network construction

company **Render Networks** to hasten its FTTH expansion through the Glo Fiber brand. Glo Fiber is using Render's platform to decrease overall construction deployment schedules through the tracking of build status in real time, contractor productivity trends and time-to-revenue implications.

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## GCI EXPANDS 5G ONCE AGAIN

**GCI** is strengthening its mobile presence in Alaska once again, launching 5G service in Nome and Kotzebue. The investment, the provider's latest to expand its 5G footprint, totaled \$5.3 million to bring that level of service to the Northwestern Alaska communities

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## FUBO, BRUINS SIGN PARTNERSHIP

Hockey is near, and **Fubo** is celebrating by sealing a second partnership with a Boston pro sports team. The vMVPD is teaming up with the Boston Bruins for the 2023-24 season to have virtual Fubo branding displayed on the blue line at select home and away games. Bruins season ticket holders can get \$100 off a new Fubo subscription over two months, while non-season ticket members will be eligible for a 14-day trial. Fubo—which partnered with the Red Sox in May—carries both **NESN** and **NBC Sports Boston** as well as **ESPN, NHL Network** and other sports networks.

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## UTAH GOES FOR THE WIN

The new frontier of name, image and likeness in collegiate athletics is entering the streaming space. **For The Win 360°**, a video platform built for NIL collectives of NCAA schools, made its first partnership with the University of Utah's Utah Crimson Collective. FTW360 will launch **For The Win 360° – Utah** on October 14. It'll offer viewers player profiles, interviews, game highlights and behind-the-scenes content. The platform will primarily center on Utah's football team initially before expanding to other sports, with the goal of featuring every student athlete at the school over the next year. “The whole idea is to really help the players build their name, image and likeness and create sponsorship opportunities,” FTW360 CEO **Derek Mattsson** told **CFX**. “We'll have sponsorship capabilities where businesses, donors, supporters, fans can sponsor a player to appear in a commercial or help with their charity or do whatever, and benefit from their name image and likeness.”

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## PEOPLE

**Disney Branded Television** named **Jenna Boyd** its next SVP, Development. She'll manage the team responsible for scripted series development and the production of scripted series pilots for **Disney+** and **Disney Channel**. Boyd was previously Director, Kids & Family Series for **Netflix** and helped build its original animation and live-action series slate while also formulating the creative team focused on kids and family content. She'll report to EVP, Live Action and Unscripted **Charlie Andrews**.

# Think about that for a minute...

## Time and Time Again

Commentary by Steve Effros

Oh, well, as the proverb first penned by Scottish poet John Burns put it, the best laid plans of mice and men oft go astray! Actually he originally wrote "The best laid schemes o' Mice an' Men Gang aft agley," but never mind. The point right now is that I really didn't intend to write a second column in a row about "net neutrality." But then I got an email from the folks at Public Knowledge, (PK) the lobbying group claiming to be acting on behalf of consumers.

It wasn't surprising that the lobbying would start as soon as the "third Commissioner" in the majority at the FCC was confirmed, and it was announced they would immediately consider a new rulemaking to reinstate the net neutrality rules. They were eliminated in 2017. The email urged recipients to contact their members of Congress to promote support for the reimposition of those rules.

Now as anyone who has followed this "NN" saga for a while knows, some of us have long argued that these are rules in search of a problem rather than the other way around. What was the problem prior to 2017? Well, in theory it was that the "ISPs," internet service providers, (we now call them broadband providers) were in a position to do all sorts of egregious things to those wanting to use the internet. That some services would get priority over others, that some would be intentionally blocked, others would be sped up, and the ISPs in essence would "control" what you and I could access and do on the internet.

The PK folks did acknowledge that the ISPs had long ago said they would not do these things, and many economists have pointed out that there were no viable business plans that would support such actions, but despite all that, PK said; "...broadband providers can violate these pledges and control where you go online and what services you can use over broadband networks. We've seen this time and time again..."

So there you have it, they acknowledge that the broadband providers have pledged they would not do these dastardly things they fear but want to introduce a massive "Title II"

(common carriers) regulatory scheme anyway. Why? Because "...we've seen this time and time again!" Well, I noticed that PK had linked support for those "time and time again" claims in their email, so I decided to check what all these bad guys were found to be doing. Guess what? The first "time" was a reference to a complaint in 2012, and the second to an issue raised in 2015!

The important thing to note here is that it would appear that even Public Knowledge, which only cited a handful of miscues leading up to the original adoption of the net neutrality rules in 2015, has been unable to point to any major problems caused by the elimination of those rules in 2017!

To be sure, broadband providers are not perfect, and there will always be issues that need attention. But a massive, heavy-handed "public utility" regulatory scheme is very hard to justify. That's especially true since even those promoting the idea, premised on fear, not facts, can't come up with substantive proof of "need" for regulation after six years of increasing broadband deployment and competition. I really think Public Knowledge has made the case against more regulation.

Yes, I know, this is a philosophical issue about whether broadband should be considered a "public utility." But as the Supreme Court is increasingly making clear, that would be a "major question" that they would most likely now say is for Congress, not three FCC Commissioners, to decide. Thus, even

if the Commission does vote in a new "net neutrality" regime, it likely wouldn't happen. "...The best laid plans..."



*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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