

Cablefax Daily™

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What the Industry Reads First

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Comcast Playbook: Wireless Potential Opportunity; HSD a Definite Driver

Just so everyone's clear, **Comcast** doesn't think it *has* to be in the wireless business. "It's because we think there might be an opportunity for us to fuel additional growth," evp, consumer services *Marcien Jenckes* said during an investor conference Tues. "We're still in the process of evaluating that." Last month, the company tapped *Greg Butz* to head **Comcast Mobile**, fueling fantasies about just what sort of wireless play the operator has in mind. The nearly hour-long appearance at the **Nomura Media, Telecom & Internet Conference** had Jenckes guide the audience through key areas of the company's businesses. **HSD**: There still is a lot of growth left in high-speed data, he said. About 70-75% of American homes have a high-speed Internet connection and "that will get bigger." When it comes to taking share from competition, "there's still a long runway there. There are 6mln DSL subscribers within our footprint. There's no lack of homes for us to continue to go after," Jenckes said. Asked about **Google Fiber** and its pullback, he said growth has been slower than some people anticipated, crediting in part Comcast's competitiveness. "We're not going to roll over." His impression is that Google is more focused on MDUs at this point. **OTT**: Comcast has a deal now with **Netflix**, but as Jenckes pointed out, there's only one Netflix at the moment. That doesn't mean Comcast isn't interested in working with others though. "There are other companies that are aggregating content that our customers want access to," he said. Asked if he has any qualms about search possibly pointing subs to content on Netflix that's available on Comcast-owned platforms, Jenckes took the high road. "No one has ever gone wrong by doing right by the consumer," he said. **NBCU**: The exec said Nielsen data shows the Olympics ratings are 19% higher in Comcast homes, evidence of the synergy NBCU brings to the table. Comcast also has enabled some addressable video ad campaigns for NBC, which it has parlayed into similar partnerships with other networks. The partnership has let Comcast experiment in ways that can benefit the entire industry, he said. **Olympics**: Back to the Rio for a moment, it was interesting to hear Jenckes stress that all of this is about a lot more than 2 weeks in Aug. "We put a whole bunch of work in that will last a lot longer," he said, pointing to the **NBC Sports** app. While it's being highlighted for the Olympics right now, he said it's extendable to other events, such as college football, NHL, and big events such as the Oscars. "There are lots of examples where we build things around an event, and all that survives as almost a new baseline of what the TV expe-

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62	Golf Channel (GOLF)
67	BBC America (BBCA)
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139	Great American Country (GAC)
157	Bloomberg Television (BLOOM)

*comScore TV Essentials © Network Summary / Network (Qtr3 2016: 06/27 – 09/25). Data reported by comScore from AT&T U-verse set top boxes nationally. Reported STB data excludes national broadcasters. Report generated on August 12, 2016.



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rience [is].” **Xfinity Home:** “It’s one of my favorite services. It reminds me of what a cable company can do,” Jenckes said. “A lot of time, people think of us as incumbents. For a lot of products and services we deliver, we’re the disruptor.” So is the case with home security, which the company launched about 4 years ago. Numbers haven’t been disclosed, but last year Comcast said it had more than 500K Xfinity Home customers. “It’s growing rapidly,” he said.

Spectrum Auction: Round 1 of the **FCC’s** forward auction concluded Tues with actual proceeds of \$8.49bln. Net proceeds are estimated to be closer to \$8bln. Round 2 is set to get underway at 10am ET today. Unlike the 6 hours for Round 1, it will only last for 2 hours. Round 3 will kick off at 2pm and so it continues until the auction hits \$88bln to cover the money promised to broadcasters in the reverse auction or there’s no more demand expressed. How long will it go? No one knows. Unlike the reverse auction, in which there is a limited number of possible rounds, forward auction bidding rounds for a stage can continue without limit so long as demand outpaces supply for any product. If the auction doesn’t hit \$88bln, the clearing target of 126 MHz can be lowered. There are 62 bidders eligible to bid in the auction, including **Comcast**, **DISH** and **Verizon**.

Ratings: It may be hot outside now, but fall, with its football and elections, is just around the corner. Last week’s **Nielsen** ratings gave a glimpse of the cooler days ahead. **ESPN’s NFL** preseason matchup on Sat was the week’s most-watched program with 3.2mln viewers. Meanwhile, **Fox News** was the #1 cable net in prime (1.8mln total viewers) and took 2nd place in total day behind **Nick** (1.3mln viewers vs 1.2mln). There are a lot of headlines on lagging Olympics viewership via linear, but they’re still drawing a lot of eyeballs. Still, not everyone was watching **Michael Phelps** and **Katie Ledecky** last Mon night as **USA’s WWE** 3-hour slate drew about 3mln viewers each hour. Another big winner was **OWN’s** “Haves and Have Nots,” which averaged 2.9mln viewers. **Disney** was the 2nd-most watched net in prime (1.4mln viewers), followed by Olympics showcase **NBCSN** (1.2mln). **Starz’s** “Power” finished 1st among premium nets for the 5th consecutive week (P2+ Live+SD). Sun’s ep average 1.8mln viewers. Overall, the series is the #1 weekly scripted drama among 18-49s since its July 11 debut. -- Back to Olympics ratings, Mon (8/15) posted a total audience delivery average of 25.5mln viewers in primetime (24.3mln viewers for NBC-only coverage). Also in prime, NBCSN’s live coverage Mon averaged 948K viewers. Through Mon, NBC Olympics live streaming has reached 2bln live streaming minutes for the first time ever. That tops by more than 500mln minutes the combined total of all prior Olympics.

Back to the FCC: *Paul de Sa*, who was the senior analyst covering telecom at **Bernstein Research** for the past 4 years, is headed back to the **FCC**. Chmn *Tom Wheeler* is appointing him as chief of the Office of Strategic Planning and Policy Analysis, a leadership post he held under former FCC chmn *Julius Genachowski*. De Sa takes over for *Elizabeth Biley Andrion* who has been serving as acting chief of OSP since Jan and plans to leave the Commission later this month.

Broadband Adds: The 14 largest cable and phone providers added about 190K broadband subs in 2Q, less than in any quarter in the past 15 years of tracking, **Leichtman Research** said. Telcos lost about 360K broadband subs—the most in any quarter—while cable added 550K subs, the most net adds in any 2Q since 2008. Of the estimated 91.9mln broadband subs these companies serve, cable has 57mln and phone has 34.9mln subs.

Lillie Leaving: *Charisse Lillie*, **Comcast Foundation** evp and **Comcast** community investment vp, plans to retire in Jan. She’s been with the company for 12 years. In an interview with the *Philadelphia Tribune*, Lillie said she’s ready for the next phase of her career, which may include writing a book. “I do hope to write a book about my career and some of the life lessons that I’ve learned from being in government and community service, being in private practice as well as being in corporate America. I’m really hoping I could make that happen,” she told the Tribune.

AT&T Gigabit Speeds: **AT&T** launched GigaPower in 2 new markets, the Cleveland, OH—Cleveland, Bedford Heights, Bedford, Shaker Heights and the surrounding communities—and Sacramento, CA—Lincoln, Rocklin, Roseville and the surrounding communities—totaling 2.2mln locations across 29 of the US’s largest metro areas. AT&T also launched 1Gbps speeds on their AT&T Business Fiber network for businesses in Cleveland. Locations include Cleveland-Elyria, Canton-Massillon, Findlay, Dayton, Columbus, Springfield, Akron, Toledo, Sandusky, Cincinnati and Youngstown-Warren-Boardman market areas.

Programming: **Investigation Discovery** greenlit new series “Scene of the Crime with *Tony Harris*,” with production beginning this summer to debut in 2017. -- The 4th annual **iHeartRadio** Music Awards will air live on March 5 on **TBS**,

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TNT and truTV at 8pm ET and simulcast on iHeartMedia stations nationwide. -- The 5th biennial televised fundraising special "Stand Up To Cancer" will premiere live Sept 9 at 9pm on the Big 4 along with **American Forces Network, ASPIRE, Audience Network, Bloomberg TV, Bravo, Comedy Central, Discovery Life, E!, EPIX, ESPNEWS, FM, FS2, Fusion, FXM, Great American Country, HBO, HLN, ION Television, LMN, Logo, MLB Network, National Geographic, Pivot, RLTV, Showtime, Smithsonian Channel, Starz, Starz Encore, TBS, Tr3s, VH1** and **WGN America**. For the first time, a Spanish version will air on **Galavisión, HBO Latino, STARZ Encore Espanol** and **Univision Deportes**, and locally on **Univision Puerto Rico**. The show will stream live on SU2C's **Facebook** page, **Yahoo**, SU2C's **YouTube** page, **MLB.com** and in Spanish on **Univision.com**.

People: *Maria Jordan* was named vp, financial planning and analysis for **Bravo & Oxygen Media**. Previously sr dir of financial planning and analysis for Bravo, she will now oversee the planning and analysis for both brands. -- **You.i TV**, a multi-screen video app platform company, hired *Dan Beer* as its first COO. Beer will manage the growth of the You.i Engine platform. He previously led 2 **IBM** groups—the performance mgmt software segment and the M&A integration group.

Cablefax Daily Stockwatch

Company	08/16 Close	1-Day Ch	Company	08/16 Close	1-Day Ch			
BROADCASTERS/DBS/MMDS								
DISH:	52.16	(0.09)	INTEL:	35.21	0.30			
ENTRAVISION:	7.62	(0.15)	INTERACTIVE CORP:	57.80	(1.05)			
GRAY TELEVISION:	11.75	(0.12)	LEVEL 3:	48.69	(0.89)			
MEDIA GENERAL:	17.93	(0.03)	MICROSOFT:	57.44	(0.68)			
NEXSTAR:	54.05	(0.45)	NETFLIX:	95.15	(0.16)			
SINCLAIR:	29.11	(0.64)	NIELSEN:	52.76	(0.17)			
TEGNA:	21.34	(0.03)	SEACHANGE:	3.30	0.02			
MSOS								
CABLE ONE:	537.80	3.07	SONY:	32.78	0.02			
CHARTER:	257.14	(3.37)	SPRINT NEXTEL:	6.05	(0.1)			
COMCAST:	67.31	(0.21)	SYNACOR:	2.86	(0.03)			
GCI:	12.48	(0.21)	TIVO:	10.64	(0.02)			
LIBERTY BROADBAND:	67.24	(0.71)	UNIVERSAL ELEC:	77.88	0.42			
LIBERTY GLOBAL:	32.56	0.12	VONAGE:	5.93	(0.13)			
SHAW COMM:	20.29	(0.21)	YAHOO:	42.49	(0.18)			
SHENTEL:	28.87	1.55	TELCOS					
PROGRAMMING								
21ST CENTURY FOX:	25.46	(0.39)	AT&T:	41.96	(1.06)			
AMC NETWORKS:	56.93	0.31	CENTURYLINK:	29.42	(0.6)			
CBS:	51.59	(0.69)	FRONTIER:	4.85	(0.05)			
DISCOVERY:	26.35	(0.23)	TDS:	28.81	(0.64)			
DISNEY:	96.88	(0.22)	VERIZON:	52.76	(0.85)			
GRUPO TELEVISA:	27.43	(0.31)	MARKET INDICES					
HSN:	44.28	(1.24)	DOW:	18552.02	(84.03)			
LIONSGATE:	21.64	(0.3)	NASDAQ:	5227.11	(34.9)			
MSG NETWORKS:	16.93	0.12	S&P 500:	2178.15	(12)			
SCRIPPS INT:	63.77	(0.31)	TECHNOLOGY					
STARZ:	31.72	(0.12)	ADDVANTAGE:	1.79	0.00			
TIME WARNER:	81.05	0.19	AMDOCS:	58.29	(0.92)			
VIACOM:	47.71	0.17	AMPHENOL:	59.84	(0.68)			
WWE:	20.83	(0.19)	APPLE:	109.39	(0.09)			
TECHNOLOGY								
ARRIS GROUP:	27.78	(0.52)	AVID TECH:	9.15	0.03			
AVID TECH:	9.15	0.03	BLNDER TONGUE:	0.61	UNCH			
BLNDER TONGUE:	0.61	UNCH	CISCO:	31.12	(0.07)			
CISCO:	31.12	(0.07)	COMMSCOPE:	28.99	(0.09)			
COMMSCOPE:	28.99	(0.09)	CONCURRENT:	5.18	(0.08)			
CONCURRENT:	5.18	(0.08)	CONVERGYS:	29.38	(0.06)			
CONVERGYS:	29.38	(0.06)	CSG SYSTEMS:	40.52	(0.18)			
CSG SYSTEMS:	40.52	(0.18)	ECHOSTAR:	38.49	(0.04)			
ECHOSTAR:	38.49	(0.04)	GOOGLE:	777.14	(5.3)			
GOOGLE:	777.14	(5.3)	HARMONIC:	4.11	(0.1)			
HARMONIC:	4.11	(0.1)						

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