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What the Industry Reads First

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Network Check-In: Signs of Normalization Ahead

It's been more than three months since the country's broadband network had to adapt to the COVID-19 pandemic, and we're getting a clearer view of how the industry has responded. Overall, since March 1, national downstream peak growth is up 8.4% while upstream peak growth climbed 23.1%, according to the latest data from **NCTA's** COVID-19 dashboard. At **Comcast**, the company responded to the surge by tripling the number of network enhancements made in March in April compared to the same period a year ago, adding 1700 new **100-gigabit links**. "The majority of that was coming into the local markets and going into the access network. That's really where we added that capacity," Comcast evp, chief network officer *Jan Hofmeyr* told **CFX**. "The network was designed to be able to constantly add capacity. The great thing is we were able to add that capacity without any interruptions to the service." There are signs that the initial broadband usage surge is slowing. NCTA reported last week that there was a light decrease of 1.2% in national downstream peak growth over the previous week. Similarly, national upstream peak growth declined 0.4% over the previous week. "We saw the massive surge as people started working from home. We saw the shift in terms of peak traffic to more in daytime. Over the last couple weeks, we've seen a little bit of a plateau of that and we're also starting to slowly see the shift back into normal hours when we experience peak," said Hofmeyr. **USTelecom** data backs that up, with the association finding that overall network traffic has decreased since mid-April according to data for its largest members. For the week of June 25, USTelecom found traffic ranged from 6.8%-14.9% over the pre-COVID baseline. Will broadband usage ever return to pre-COVID levels? Hofmeyr declined to make a prediction, but said he expects some things—like video conferencing and more remote work—to continue. "The silver lining is I think people appreciate broadband more than ever before," he said. The pandemic certainly accelerated the industry's capacity planning, but now that the numbers are beginning to normalize, many are turning back to their normal network planning and investing. "We are still very focused on the symmetrical 1-Gig that we spoke about before. All the work we're doing around virtualization and AI and our networks, we continue to focus on that," Hofmeyr said. "We're pretty much back on executing the plan we've laid out for ourselves."

ViacomCBS and DISH Strike Deal: ViacomCBS and DISH reached a multi-year renewal of their carriage agreement to bring ViacomCBS channels to DISH and **Sling TV** customers. Terms of the deal were not disclosed. The



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Advertising Contact: Olivia Murray, Account Executive
301.354.2010 | omurray@accessintel.com

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two had been out of contract for several months, with DISH chmn Charlie Ergen noting during the company's 2Q earnings call that ViacomCBS has seen ratings declines over the years while investing a lot in AVOD Pluto. "We like the company a lot personally, but there's a reality out there of where the market is. And it's probably not the same as it was in years past," he said. The deal comes after several major carriage agreements for ViacomCBS, launching on NBCU's **Peacock** July 15, and an agreement with **YouTube TV** in June.

Supreme Court Upholds Law Banning Robocalls: On Monday, the Supreme Court upheld a federal ban on robocalls, affirming an appeals court decision that the government cannot exempt calls to collect government debts. Robocalls were first banned in 1991 under the Telephone Consumer Protection Act, but in 2015 an exception was added that exempts government debt collection services. In a 6-3 vote, Justice *Brett Kavanaugh* wrote that an exception to the ban created by Congress is unconstitutional under the First Amendment. The case had a potentially strong impact on political advertising, after the American Association of Political Consultants and three other orgs filed a suit aiming to invalidate the entirety of the TCPA in order to make political robocalls to cellphones.

FCC Strikes Up T-band: The **FCC** released its Notice of Proposed Rulemaking Monday on reallocating T-band spectrum, which is currently used by public safety licensees. It tees up a process to auction the airwaves—a notion that isn't popular at the agency. However, the 2012 Middle Class Tax Relief and Job Creation Act directed the FCC to auction off T-band spectrum by 2021. The NPRM seeks comment on reallocating T-band spectrum, assigning new licenses by auction for the 6 megahertz to 18 megahertz of spectrum that is potentially available in each of the eleven urbanized areas, and relocating "public safety eligibles" from the T-band. FCC chmn *Ajit Pai* circulated the T-band item in May, but not because he wanted to. "It's unfortunate that Commission resources must be dedicated to laying the groundwork for an auction that will likely fail," he said at the time. Democratic commissioner *Jessica Rosenworcel* said it's a bad idea that would disrupt critical communications for first responders and will cost billions more than what can be reasonably expected from the auction. Still, she supported the decision because the FCC doesn't have the authority to waive the statutory requirement. "I wholeheartedly agree with the Chairman that congressional action that would stop this auction and allow public safety authorities to continue to communicate using the T-Band is the best way forward."

Baseball is Back: The **MLB** will announce the 2020 60-game baseball schedule Monday night at 6pm on **MLB Network**. The one-hour special will reveal key matchups and dates, kicking off at 6pm. The MLB is set to return to play on July 23. Each team will play a regionally based schedule featuring 40 divisional games and 20 Interleague

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Kaepernick, Disney Sign Deal: Disney signed an overall first-look deal with Colin Kaepernick's production arm **Ra Vision Media**. The partnership will focus on scripted and unscripted series exploring race, social injustice and the quest for equity. The deal extends across all Walt Disney Platforms, including Walt Disney Television, **ESPN**, **Hulu**, **Pixar** and The Undeclared. The first project in development is a docuseries chronicling Kaepernick's journey, set to air on ESPN.

Hamilton Doesn't Miss Disney+ Shot: Disney+ struck gold with the premiere of "Hamilton" on the streamer on July 3. From Friday through Sunday, the Disney+ app was downloaded 752,451 times across the world, according to analytics firm **Apptopia** in data shared with *Variety*. Of those downloads, 458,796 were in the US, marking a 74% uptick in downloads over the average of the four weekends in June 2020 over comparable time periods. It's also worth noting that the subscriber bump for the streamer was likely higher, as the mobile app data doesn't include online and smart TV signups.

Charter Offers Senior Unsecured Notes: Charter and its subsidiaries announced it will offer senior unsecured notes, due in 2031. The company intends to use proceeds from the sales for related fees and expenses and for general corporate purposes, including repaying debts at CCO Holdings and fund potential buybacks for Charter stock or common units of Charter Communications Holdings.

Ratings: "Renovation Island" on **HGTV** delivered a season high L+3 rating among P25-54 for its June 28 episode. The .89 rating was a 92% increase YOY and a 44% lift over the prior six weeks.

Programming: Lifetime's summer programming event "Ripped from the Headlines" is set to kick off on Aug 1 with the premiere of "Sleeping with Danger" at 8pm and companion doc "Elizabeth Smart: Finding Justice" on Aug 2. The week concludes with the two-night documentary event "Surviving Jeffrey Epstein" on Aug 9 at 8pm and Aug 10 at 9pm. -- **Netflix** renewed "Dead to Me" for a third and final season. Creator *Liz Feldman* also signed a multi-year overall deal with the streamer for original series and other projects. -- **Nickelodeon's** "All That" is reuniting the cast of "Zoey 101" in a new version of the sketch "Thelma Stump." The sketch airs July 11 at 9pm. -- **Ovation TV** made its interview series "Arts Engines with Aaron Dworkin" available free to the public on the Ovation Now app and its other digital platforms. The first 10 episodes are currently available, with six more in production. -- **Cinéma** has the exclusive premiere of Global Men's Fashion Week. The two-part series first kicked off on Sunday, and part two will air July 12 at 9pm.

People: The **FCC** announced that *Ashley Boizelle* will serve as acting general counsel for the commission. She first joined the commission in 2017 as deputy general counsel for administrative law and has served as deputy general counsel for litigation since last year. She'll serve as acting general counsel from July 13 to Sept 4 while general counsel *Tom Johnson* is on paternity leave.



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