

# Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

## Here to Stay: Comcast Celebrates Broadband, Pandemic Wins

**Comcast** closed out the unusual year that was 2020 with another record-breaking quarter for broadband, counting 538,000 adds. That marks it as the best fourth quarter the MVPD has ever had. Revenue fell 2.4% YOY to \$27.7 billion, but that had more to do with Comcast's other businesses than anything within its traditional cable and broadband units.

While the pandemic certainly threw a wrench into Comcast's original plans for 2020, it forced the company to rethink how it operates and services its customers. The results of shifts like moving all of its care reps to work remotely from home and promoting further adoption of digital self-help tools have gone over so well that Comcast chmn/CEO *Brian Roberts* said the company is leaning towards embracing the model permanently. Over the last 12 months, the MVPD has reduced agent-handled calls by over 16 million and truck rolls by 1.6 million, all while adding 1.6 million net new customer relationships.

Other major wins were scored on the business services and wireless fronts. The business services segment saw 4.8% revenue growth YOY and 26,000 net customer additions, primarily driven by improvement in the small businesses space. Wireless revenue grew 36% thanks to the 246,000 new lines that came online in 4Q, and at year-end, Xfinity Wireless was able to count 2.8mln total lines.

Comcast Cable pres/CEO *Dave Watson* expressed his excitement over the unit and the company's expanded MVNO

agreement with **Verizon**, calling it a great starting point and a powerful tool when it comes to broadband retention. Over time, he said Comcast could explore adding its own targeted wireless infrastructure into the mix that would supplement the Verizon network and allow the company to support high density usage areas with spectrum that it has already acquired.

"We are looking at and working on development plans around the targeted use of the CBRS spectrum in dense, high usage areas and how we could offload traffic, how the experience can be terrific in doing so," Watson said. "This is a multi-year effort, but a lot of focus is on it right now."

Video continued to decline with Comcast reporting a 248,000 net loss in customers, and revenue fell 0.7% with higher rates implemented at the start of 2020 offsetting subscriber declines. Expenses for the cable communications segment rose 2.4%, largely because of programming costs and a number of contract renewals that started to cycle through in 2020.

Revenue at the NBCU cable networks fell 6.4% YOY to \$2.7bln due to lower content licensing, advertising and distribution revenues. Ratings declines and the delayed start of some professional sports seasons were to blame for the advertising losses while the fall in content licensing came down to the timing of content provided under existing agreements.

There were few mentions of Xfinity Flex on the call, with leadership speaking not just of their satisfaction with how it has been performing but also of long-term plans for expanding its distribution to include those outside of Comcast's footprint.

## Mark Your Calendars!

### Cablefax Award Submission Deadlines:

#### The FAXIES Awards

Entry Deadline: March 19  
Final Deadline: March 26

#### Cablefax 100 Nominations

April 9

#### Top Ops Nominations

April 23

#### The Diversity List Nominations

July 16

#### Most Powerful Women Nominations

September 10

#### Program Awards

Entry Deadline: November 19  
Final Deadline: December 3



**MoffettNathanson** believes that if Comcast were to play this right, it could build its very own competitor to Roku.

“They’ve already got the right content partnerships, and they’ve already got a distribution partnership agreement with **Cox**. If they could get one with **Charter**, Flex would have a national footprint, a prerequisite, it would seem, for both national advertising and national retail (**Walmart? Amazon?**),” MoffettNathanson said in a note. “With **Sky**, that national footprint could even become an international one... dare we say even a global one?”

**PEACOCK REACHES NEW HEIGHTS**

**Peacock** has passed the 33 million sign-up milestone, **Comcast** announced during the company’s 4Q earnings call. **NBCU**’s initial target was to reach 30-35 million active accounts by 2024, and while its on a good trajectory to hit those metrics, it isn’t ready to declare total victory just yet. “We launched this on Comcast just over nine months ago and nationally just over six months ago, so we’re at the very beginning of this business,” **Comcast Cable** CEO **Dave Watson** said. “This steady growth is very promising for us and we don’t have anything to reframe at this point, but I think that the performance is much better than we expected and gives us a lot of optionality going forward.” NBCU has been banking on the Tokyo Olympics to add a boost of exclusive programming to Peacock’s lineup, and leadership remains confident that the delayed global gathering will still take place this July. “I think it can be done in a variety of ways, as we’ve seen sporting events all over the world take place from **Premier League** to the **NFL**, and many others with limited spectators, no specta-

tors or wherever the world may be in Japan in July. That’ll be up to the host country and host committee,” Comcast chmn/CEO **Brian Roberts** said. Worst case, he reminded investors that the next Winter Olympics is slated for 2022 in Beijing.

**COMCAST EXTENDS DATA CAP GRACE PERIOD**

Facing pushback over plans to expand its 1.2 Terabyte data cap to the Northeast, **Comcast** is providing customers with additional time to become familiar with the new plan. Customers in these markets, which include DC, Massachusetts and Virginia, won’t see any overage charges until August at the earliest. Comcast announced in November that it would expand the cap to the rest of its residential footprint starting January 1. Those who use more than 1.2 Terabytes and aren’t on an unlimited plan will automatically receive additional 50GB blocks for \$10 each, with a maximum overage charge of \$100. Initially, Comcast had set a grace period through March. Lawmakers in impacted areas have criticized the move. Just this week, **Baltimore City Council** members asked the Maryland Attorney General to investigate the caps as a form of “predatory price gouging.” Comcast has stressed that the vast majority of its users don’t come close to exceeding the cap, estimating that about 5% of customers use more than 1.2TB of data in a month. **Charter** recently dropped a petition at the **FCC** seeking early sunset of merger conditions that prevent it from imposing data caps and usage-based pricing. Earlier this month, **House Commerce** leaders sent letters to Charter, Comcast, **AT&T** and others questioning their commitment to consumers amid some ISPs raising prices and imposing data caps during the pandemic.

**Corporate Licenses**

**Cablefax Daily**

**WHAT THE INDUSTRY READS FIRST.**

Get reduced subscription rates for multiple readers in your organization.

Find out more! Contact Client Services at [ClientServices@accessintel.com](mailto:ClientServices@accessintel.com)

[www.cablefax.com](http://www.cablefax.com)

*(Magazine cover text: MONDAY, NOVEMBER 2, 2020 Cablefax Daily VOLUME 31 | NO. 211 WHAT THE INDUSTRY READS FIRST Deal Talk: RCN/News/Grande CEO Dissect \$4.1bn Stongard Deal...)*

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) | 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) | Executive Director, Strategic Partnerships: Albert Nassour, 917.545.3129, [anassour@accessintel.com](mailto:anassour@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

**SECTION 230 & ADVERTISING**

Section 230 of the Communication Act remains in the headlines. On Thursday, Rep **Yvette Clarke** (D-NY) called for public comment on the discussion draft of her upcoming bill, the “Civil Rights Modernization Act of 2021.” It would amend Section 230 to ensure that civil rights laws apply to the targeting of advertisements. The bill’s premise is that personal data such as gender, race, hobbies and zip code can be used to limit online visibility of some opportunities, thus perpetuating inequities in housing opportunities, credit and employment. **House Communications** subcommittee chair **Mike Doyle** (D-PA) agreed that online platforms need greater accountability and said he plans to work with colleagues to release additional proposals to reform existing law.

**EMERGENCY BROADBAND MEETING**

**FCC** chair **Jessica Rosenworcel** will convene a virtual roundtable discussion Feb 12 to gather public input on how to structure the \$3.2 billion Emergency Broadband Benefit Program, which is aimed at providing a discount on broadband and certain connected devices to eligible households during the pandemic. More details about panel topics and participants will be announced in the coming days. On Wednesday, representatives from **ACA Connects**, **Incompas**, **NCTA** and **WISPA** jointly met with Wireline Bureau staff to discuss the program. In addition to stressing (again) the importance of enabling participation of non-ETC broadband providers, they pushed that non-ETCs be provided with access to data systems and training so they will be ready on Day 1 of the program. The associations also encouraged the Commission to establish an initial filing window for applications to participate in the program, rather than a rolling review process, and a single start date for all qualifying providers so that consumers are presented with a full array of competitive broadband choices.

**GLAAD MEDIA AWARDS**

With 26 nominations, **Netflix** received the most **GLAAD** Media Awards nominations of any network. It was followed by **HBO Max** (9). **Amazon**, **Hulu** and **HBO** each received 4 nods, while **Disney+** and **PBS** each received 3 nominations. Streaming services accounted for 58 of the 198 nominees, while cable received 29 noms and broadcast garnered 14. Notably, **Hallmark Channel** received its first nomination for “The Christmas House,” it’s first Christmas movie featuring a gay couple. The movie premiered a year after the network pulled a wedding ad featuring a gay couple.

**LGBTQ EQUALITY WORKPLACES**

A record 767 companies achieved the top score of 100 in the **HRC Foundation’s** Corporate Equality Index, a benchmarking survey and report measuring company policies and practices related to LGBTQ workplace equality. That’s up almost 12% from last year’s 686. Companies earning a 100% rating and the designation of being a 2021 “Best Place to Work for LGBTQ Equality” include **Aitice USA**, **Comcast NBCU**, **Cox Enterprises**, **TDS Telecommunications**, **TEGNA**, **Univision**,

**ViacomCBS**, **Walt Disney Company**, **AT&T**, **Verizon** and **T-Mobile**.

**PEACOCK USERS FIND ‘THE OFFICE’**

Demand for the “The Office” following its move from **Netflix** to **Peacock** spiked 39% in the first three days on the **NBCU** streamer compared to its last day available on Netflix, **Parrot Analytics** reports. The increase in demand continued, with demand 30% higher from Jan 1-19 compared to the previous 19 days on Netflix.

**BLACK HISTORY MONTH PROGRAMMING**

There’s a lot of good programming on deck for next month, including **History Channel** one-hour doc “Tuskegee Airmen: Legacy of Courage,” produced by “Good Morning America’s” **Robin Roberts**, whose father was a Tuskegee Airman (Feb 10, 8pm). History is also launching an extension of its “Save Our History” campaign by spotlighting everyday heroes who have impacted communities and shaped Black history. Viewers are encouraged to upload photos or video, with several stories to be featured on the network’s linear and social media platforms throughout February and beyond. – For Black History Month, **Charter** is making several movies and specials available on Spectrum on Demand, including “Dreamgirls” and “12 Years a Slave.” – **Fox’s** free streaming service **Tubi** boasts that it has one of the largest Black cinema collections available online. Titles include “Martin Luther King Jr: One Man and His Dream” and “Concussion.”

**PROGRAMMING**

**ViacomCBS** will premiere “The SpongeBob Movie: Sponge on the Run” on March 4 on **Paramount+**, while also releasing it to premium VOD for a suggested \$19.99 in the US for a limited time. Paramount+ also launches on March 4 the first six eps of new original series “Kamp Koral: SpongeBob’s Under Years.” Additional eps will be released at later dates to be announced. – We’ll soon find out if New Kids on the Block member **Jonathan Knight** has the right stuff when it comes to home renovations. **HGTV** will debut six-ep “Farmhouse Fixer” with Knight restoring centuries-old New England farmhouses on March 3. – **Telemundo** will launch three-hour, weekday morning show “hoy Día” on Feb 15 at 7am. The net promises to take a “news first” approach focused on current events for the US Hispanic community, as well as providing entertainment news, weather updates and lifestyle segments. – **Fox News** signed civil rights lawyer **Leo Terrell** as a contributor to all its platforms. – **OWN** will debut documentary film “(In)Visible Portraits” from artist and storyteller **Oge Egbuonu** as part of its “OWN Spotlight” franchise on March 2. Nearly three years in the making, Egbuonu’s directorial debut features Black women sharing their stories of struggle, resilience and beyond.

**PEOPLE**

**WGN America**, soon to be rebranded **NewsNation**, selected **Mike Viqueira** as its DC Bureau Chief, reporting to **Jennifer Lyons**, WGN America’s vp, news. He joins from **CBS Evening News**.

# PROGRAMMER'S PAGE

## Curtis to the Renovation Rescue

Everybody has had a moment where they take on a project that seems manageable only to find themselves overwhelmed halfway through. It's even worse when that project is something you hoped would be your forever home. **HGTV** is rescuing folks from this situation in "Rehab Addict Rescue," premiering Thursday at 9pm on the network and streaming on **discovery+** on the same day. HGTV svp, programming and development *Betsy Ayala* believes this is the natural progression forward for pro *Nicole Curtis*, who previously worked to restore historic homes on the network's series "Rehab Addict." In many cases, Curtis is helping homeowners who have been inspired by her work to take on these fixer-uppers. "Nicole receives tons of emails from people who have bought and love old homes like herself, but they have found themselves in trouble because the fixes can be daunting," Ayala told **CFX**. "So, in Rehab Addict Rescue, she is finally able to help these desperate homeowners and show them how to revive their stunning old homes." Because Curtis is focused on breathing new life into these older homes while keeping their classic charm, you won't be seeing her tearing down walls or adding modern accent walls. Instead, viewers will see the revival of original hardwood floors and easy tips on how to enhance the original architectural elements of these homes. Better yet, they'll see it done on a budget that's achievable and allows for flexibility should there be unexpected problems that arise during the renovation. "Nicole always uses her expertise and wealth of knowledge to provide so much amazing information about older homes," Ayala said. "Anyone watching the show will learn tricks and tips as well as some history in the mix." – *Sara Winegardner*

### REVIEWS

"Bucket List," streaming from Feb. 1 on **Crackle**. COVID-19 and presidential politics seem miles away when former college football great *Brian "Boz" Bosworth* takes viewers on a tour of eight of the country's best college gridiron venues, including, of course, his alma mater U of OK. The first ep features Texas A&M, a school Boz nearly attended, were it not for legendary coach *Barry Switzer* lobbying him. Of course, there's a lot of football footage—sports fans will love that—but a fair amount of culture and lore get screen time, too. At A&M we're told about Bear Bryant and the legend of the 12th man, manifested today in a walk-on getting to suit up each game in, of course, uniform number 12. Then there are the all-male yell leaders (no cheerleaders here) and the specialized choreography they lead 100K fans in during each home game. (Sorry, freshmen and sophs, you've not earned enough cred to do all the yells.) – "Frontline: China's COVID Secrets," premiere, Tuesday, **PBS** (check listings). The old journalism adage, 'show don't tell,' is an apt description of this excellent, well-sourced, mostly dispassionate 90-minute investigation into how Chinese authorities covered up, for 54 days, the initial coronavirus cases. It's certainly not escape television, but for those who want a historic look, this doc is highly recommended. – *Seth Arenstein*

BASIC CABLE P2+ PRIME RANKINGS* (01/18/21-01/24/21)		
MON-SUN	MC US AA%	MC US AA (000)
<b>MSNBC</b>	<b>0.896</b>	<b>2,760</b>
<b>CNN</b>	<b>0.895</b>	<b>2,758</b>
<b>FNC</b>	<b>0.831</b>	<b>2,561</b>
<b>HGTV</b>	<b>0.356</b>	<b>1,098</b>
<b>TNT</b>	<b>0.318</b>	<b>978</b>
<b>HALL</b>	<b>0.315</b>	<b>970</b>
<b>HISTORY</b>	<b>0.289</b>	<b>890</b>
<b>TLC</b>	<b>0.286</b>	<b>882</b>
<b>DISC</b>	<b>0.266</b>	<b>818</b>
<b>TBSC</b>	<b>0.262</b>	<b>808</b>
<b>ESPN</b>	<b>0.259</b>	<b>799</b>
<b>USA</b>	<b>0.245</b>	<b>753</b>
<b>FOOD</b>	<b>0.244</b>	<b>752</b>
<b>LIFE</b>	<b>0.226</b>	<b>696</b>
<b>INSP</b>	<b>0.221</b>	<b>680</b>
<b>ID</b>	<b>0.212</b>	<b>654</b>
<b>BRAVO</b>	<b>0.179</b>	<b>552</b>
<b>TVLAND</b>	<b>0.177</b>	<b>545</b>
<b>HMM</b>	<b>0.171</b>	<b>528</b>
<b>A&amp;E</b>	<b>0.162</b>	<b>499</b>
<b>AMC</b>	<b>0.157</b>	<b>485</b>
<b>ADSM</b>	<b>0.142</b>	<b>438</b>
<b>NAN</b>	<b>0.137</b>	<b>422</b>
<b>WETV</b>	<b>0.131</b>	<b>404</b>
<b>GSN</b>	<b>0.131</b>	<b>404</b>
<b>NATGEO</b>	<b>0.131</b>	<b>402</b>
<b>FRFM</b>	<b>0.117</b>	<b>361</b>
<b>FX</b>	<b>0.113</b>	<b>349</b>
<b>MTV</b>	<b>0.113</b>	<b>347</b>
<b>NICK</b>	<b>0.110</b>	<b>339</b>
<b>TRAVEL</b>	<b>0.109</b>	<b>335</b>
<b>COM</b>	<b>0.105</b>	<b>324</b>
<b>APL</b>	<b>0.104</b>	<b>321</b>
<b>SYFY</b>	<b>0.092</b>	<b>283</b>

\*P2+ L+SD rankers are based on national Nielsen numbers, not coverage.



NETWORKING ACCESS MENTORING INVOLVEMENT COMMUNITY



Embrace Diversity.  
Embrace Success.

namic.com