

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Always Sunny in Philly: Comcast Enjoys Record Broadband, Mobile Highs

Comcast is still waiting for that post-COVID broadband slowdown to hit. The operator reported its best ever broadband and customer relationship results for a second quarter Thursday, adding 354,000 broadband customers and 294,000 customer relationships in 2Q21. It now expects total broadband net additions for 2021 to increase by mid-teens relative to 2019.

Comcast chairman/CEO *Brian Roberts* credited a number of the company's forward-looking decisions for the continued growth, including its decision to offer 1.2 gigabits of downstream to most customers within its footprint and a dedication to improving digital tools that saw a 22% reduction in truck rolls.

"I think about our philosophy since the early days of broadband, which has been to bet on a never ending cycle of new technologies, devices and applications that come from Silicon Valley and new startups everywhere that need to take advantage of greater speeds and capacity over time," he said on the company's earnings call Thursday. "We see this transformation happening every day and continue to believe that this is ongoing for the foreseeable future."

Perhaps the even bigger story is Comcast's focus on its wireless business, **Xfinity Mobile**. The company added 294,000 wireless customers in the second quarter, the highest it has seen in any quarter since the product's launch. "This demonstrates just how good the new MVNO is, and the trends are a

positive indicator of what to expect at **Charter**," **New Street Research** said in a note. "We have written that wireless will become a much more important part of the story over the next several quarters, particularly as broadband growth starts to slow in 2023 and beyond."

Wireless revenue skyrocketed 70.4% thanks to both increases in the number of customer lines and device sales. There's no doubt now that Xfinity Mobile is a standalone profitable business for the company. Comcast Cable CEO *Dave Watson* credited some of that momentum on the re-opening of all of the product's retail channels, but also said the company has been working to optimize both its call centers and its digital tools to ensure that it was as easy as possible to market and sell Xfinity Mobile.

"That has been a huge change, just the fact that we lead with mobile is so key, and mobile and broadband being a package... those fundamentals have emerged and are a really important part of our go-to-market strategy," he said. "If you live in our footprint and you're watching this great Olympics coverage, you can't miss the fact that we are really, really focused around the mobile business."

Watson also said the decision to introduce unlimited plans has also been a game changer, filling a hole in the product's competitive portfolio. He wouldn't say whether Comcast would be participating in the **FCC's** next spectrum auction, which should be offering new licenses in the 3.45-3.55GHz band. "We like our spectrum portfolio, it gives us optionality for

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offload,” he said. “So we will often take a look if the price is right, but no comment yet on where we stand with the next auction.”

Video continues to bleed customers with Comcast tallying up losses of 399,000 customers in the quarter.

PEACOCK HEADED SKY HIGH

Peacock is poised to make its first overseas flight. The streamer will be made available for free to **Sky**'s nearly 20 million customers in Europe. The rollout will begin later this year across Sky platforms, which currently serve customers in the UK, Ireland, Germany, Italy, Austria and Switzerland. That should trigger another boost in viewership for Peacock, which has surpassed the 54 million sign-up mark in the U.S. **NBCUniversal** CEO *Jeff Shell* said on the company's earnings call Thursday that while there have been unique challenges that have come with the Tokyo Olympics, the event has undoubtedly been a great thing for his fledgling streamer. “We had a little bit of bad luck—there was a drumbeat of negativity, we got moved a year and no spectators, and that has resulted in a little bit in linear ratings being probably less than we expected,” Shell said. “But the flip side of that is the digital strength is kind of offsetting that. What's happening with Peacock is directly related to the Olympics.” And while rumors about **Comcast** looking to engage in M&A activity with the likes of **Roku** or **ViacomCBS** to bolster NBCU's assets have been abundant in recent weeks, chairman/CEO *Brian Roberts* made it clear that he is thrilled with what he's got. “We don't need M&A. We have a majority broadband-centric company and we like the mix. So what that might drive us to consider at least is any kind of

partnership where we have unique, special capabilities that could lead globally or internationally to enhancing our streaming position, that's something where you might talk to others and consider,” he said. “I really think we have all the parts.”

DISH, WARNERMEDIA SETTLE HBO BLACKOUT

DISH and **WarnerMedia** are making nice, signing an agreement that will make streamer **HBO Max** and the previously dropped **HBO** and **Cinemax** available to DISH subscribers. The deal doesn't extend to vMVPD **Sling TV**. Both HBO and Cinemax were dropped by the satellite operator back in October 2018. At the time, DISH chairman *Charlie Ergen* blamed the merger between **AT&T** and **Time Warner** for the inability of the two parties to reach a carriage deal. For a limited time, DISH is offering customers 10 days of free access to HBO and Cinemax. DISH TV customers who subscribe to HBO Max's ad-free plan will also be able to do so for a discounted price of \$12/month for up to 12 months if they sign up by Oct 27. The plan is typically priced at \$14.99/month. The agreement comes three weeks after DISH and WarnerMedia asked a federal court to dismiss litigation against each other that centered on an allegation that the former had underpaid for **CNN** for more than two years.

COMPROMISE RAISES BROADBAND SUBSIDY HOPES

NCTA is feeling hopeful about a compromise on the proposed \$1 trillion infrastructure package, though everyone is still waiting to see the bill. The association has joined **AT&T** and others in pushing for a permanent broadband subsidy for low-income households. “While we still need to see the details of the bill, we are encouraged that the bipartisan

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infrastructure deal directly addresses two critical elements of reaching universal connectivity—dedicating funding first and foremost to those regions without any broadband service, and providing financial assistance to help low-income Americans subscribe to this critical service,” NCTA told **CFX**. “As an industry that has for many years offered low-cost plans of \$10 - \$15 per month to struggling families, we recognize the importance of helping our citizens that have access to broadband but do not subscribe for reasons including economic pressures, relevance or lack of digital skills and equipment.” **New Street Research’s Blair Levin** noted that a summary of the Bipartisan Infrastructure Framework suggests that the current Emergency Broadband Benefit program is set to become a permanent subsidy, with a draft lowering the monthly benefit from \$50 to \$30. Levin said the new language doesn’t provide a permanent stream of funding, however. “We think what is happening here is that Congress is creating a bridge of several years for low-income adoption support,” he wrote in a research note, suggesting the next step will be for the **FCC** to propose a reform of Universal Service.

ACCUWEATHER NOW COMING SUMMER 2021

AccuWeather will launch streamer **AccuWeather NOW** later this summer. The service features 24 hours of daily programming dedicated to all things weather, including extreme weather events and natural disasters, global forecasts and climate and weather-related documentaries. No word yet on where the streamer will live or pricing.

DISCOVERY LEADERSHIP SWITCH-UPS

Two **Discovery** execs are leaving by the end of 2021. Longtime cable exec **Henry Schleiff**, group president, **Travel Channel**, **Investigation Discovery**, **American Heroes Channel** and **Destination America**, is stepping down from his role by year-end. But this isn’t really goodbye. He will shift into an independent producer, and already signed a first look deal with **Discovery Networks**. Schleiff’s more than 35-year career in cable includes leading **Court TV** (the original) and **Crown Media Family Networks**. He joined Discovery in 2009. **Kevin Bennett**, group evp, programming and gm, Investigation Discovery, will leave the company in September after nearly two decades. Two execs are seeing their roles expanded to cover the responsibilities of Schleiff and Bennett. **Jason Sarlanis** will become president, crime and investigative content, linear and streaming, effective September 1. Sarlanis most recently served as svp, development at **TLC** and joined Discovery in 2016. **Howard Lee**, president, TLC streaming and network originals will expand his responsibilities to include Travel Channel.

NEXSTAR DECLARES QUARTERLY CASH DIVIDEND

Nexstar’s board declared a quarterly cash dividend of \$0.70 per share of its Class A common stock. The dividend will be payable on Aug 27 to shareholders of record on Aug 13. Nexstar said it intends to pay regular quarterly cash dividends for the foreseeable future, but the board will review and declare all subsequent dividends at its discretion.

CARRIAGE

Hulu added **NFL Network** to its live TV channel lineup Thursday, which is available to all **Hulu + Live TV** subscribers. The streamer also launched sports add-on for **Hulu + Live TV** subscribers at \$9.99/month including **NFL Redzone**, **Outdoor Channel**, **Sportsman Channel**, **MAVTV Motorsports Network**, **TVG** and **TVG2**. – **Local Now** added alpine lifestyle and ski/snowboard culture TV channel **Ski TV** to its streaming lineup. The channel will provide Local Now users with free and exclusive programming like highlights and commentary for the 2021-2022 World Ski Tour. – Family-friendly programmer **FETV** will join the **Frndly TV** channel lineup starting Thursday. FETV will be one of now 20 networks on the service, and will provide viewers with content like “Perry Mason,” “Matlock,” “Barney Miller” and “Bewitched.” – **CuriosityStream** is partnering with German programmer **Spiegel TV**, expanding the factual streamer’s European presence. Linear channel **Spiegel TV Wissen** will be rebranded under the Curiosity name for viewers in Germany, Austria and Switzerland. Spiegel TV and factual content producer and distributor **Autentic** will contribute to the new Curiosity Channel, which the current Spiegel TV Wissen team will continue to run.

PROGRAMMING

AVOD **Tubi** has struck a content deal with **STXfilms**. The service will now have an exclusive free streaming window to titles including “I Feel Pretty,” “The Edge of Seventeen,” “UglyDolls,” “Peppermint” and “Den of Thieves.” The AVOD will also offer adventure documentary “Into the Lost Desert” starting Aug 1. – **HGTV** greenlit 11 new series and has three additional pilots in production. The upcoming content slate includes “First Home Fix,” “Moving for Love,” “Call the Closer,” “Home Inspector Joe” and more. – **TNT** picked up “Snowpiercer” for a fourth season.

PEOPLE

Alicia Pritchett was appointed principal board member, **Stream-ing Video Alliance**. She is the first woman on the board and currently serves at cloud computing services provider **Fastly** as market lead, media and entertainment. Pritchett also serves as chair of the Alliance’s live streaming working group and is president and founding board member of nonprofit **Women in Streaming Media**.

OBITUARY

Bill Durand, known in the industry for his time at the **New England Cable & Telecommunication Association**, passed away on July 15 after a brief illness. He was elected five times to the Rhode Island House of Representatives before joining the cable industry in 1981. He joined the NECTA in 1985, and was key to the telling of the cable story to lawmakers throughout the region. He stayed at the association for 31 years before retiring as evp/chief counsel. Survivors include his wife (*Jeanne Durand*) as well as two children (*Brian Durand* and *Jennifer Sousa*).

PROGRAMMER'S PAGE

Old School Chip and Dale are Back

Fans of naughty little chipmunks, Chip and Dale, are in for a visual treat with **Disney+**'s "Chip 'n' Dale: Park Life." The French-American animated series, comprised of three seven-minute stories, made its debut this week on the streamer. It stands out in a crowded world of animated series because its 2D and hand drawn—giving it immediate, eye-catching appeal. "It is based on the old version of Chip n Dale. We brought the little guys into a modern 21st Century city, but we also want to have that retro flavor," director *Jean Cayrol* told *CFX*. "Disney decided to go 2D, and I think they did the right choice because when you're doing a cartoon, slapstick comedy, you don't want to restrain yourself with 3D, computer, stiff drawings. You want to go crazy. You want to stretch your characters and play with them." In the reboot, the cute duo are still best buds who drive each other nuts, with other iconic Disney characters, such as Pluto and Butch, making appearances. And true to Chip and Dale's earlier adventures from shorts in the '40s and '50s, they don't speak—at least no human language. While there's plenty of old school fun, Park Life firmly plant's cartoon's odd couple in the modern world by having them live in a park in the big city with skyscrapers surrounding them. One advantage of the setting is scale. "They are really tiny guys. Everything could potentially be an epic, cartoony adventure," said Cayrol. "Crossing a single bush could be like exploring a vast new jungle or having to swim in the duck pond could become like '20,000 Leagues Under the Sea.'" Chip and Dale can be a bit tough to tell apart based just on appearance (Dale's the one with the red nose), but their personalities are quite distinct. Chip is the more logical, rational chipmunk, while the impulsive Dale seems like he'd be a lot of fun at a party. Who does Cayrol relate to the best? "Chip, without any doubt," he admitted. "Even my daughter said, 'Dad, you are exactly like Chip from Park Life.'" – *Amy Maclean*

REVIEWS

"Dr. Death," streaming, **Peacock**. What do you want, a good story or good storytelling? Of course, you want both. In this new series you get a very good plot, based on a true story. It chronicles a surgeon who finds holes and cracks in the medical system. These flaws, a terrific academic record and a seemingly magnetic personality allow the surgeon, *Christopher Duntsch*, (easily the best performance we've seen from *Joshua Jackson*), to continue working. A brilliant student, Duntsch graduates at the top of his medical school class. His brilliance, though, is centered on research not practice and an insatiable drive. Interested yet? We've not told you the best parts, though you can probably guess from the title of the limited series. Besides Jackson, the rest of the cast includes big names like *Alec Baldwin*, *Kelsey Grammar* and *Christian Slater*. Unfortunately, none of their characters is as nuanced as Jackson's. And, as we intimated at the top, the storytelling is not up to the story. The chief culprit is the use of flashbacks. True, a day-and-date precede each flashback. Still, it takes several episodes before the viewer realizes keeping track of dates is critical. With everything else going on in the plot, that's not easy. Despite all that, this unforgettable story, and Jackson's performance, make for gripping TV. – *Seth Arenstein*

BASIC CABLE P2+ PRIME RANKINGS* (07/19/21-07/25/21)		
MON-SUN	MC US AA%	MC US AA (000)
FNC	0.665	2,049
MSNBC	0.408	1,257
HGTV	0.347	1,068
HALL	0.336	1,034
USA	0.330	1,015
TLC	0.276	850
CNN	0.249	767
INSP	0.243	750
HIST	0.237	731
TBSC	0.217	669
FOOD	0.210	645
DISC	0.193	595
NBCSN	0.179	550
ID	0.178	548
TNT	0.176	543
LIFE	0.171	528
TVLAND	0.167	514
ESPN	0.150	463
BRAVO	0.148	457
WETV	0.138	425
A&E	0.136	420
HMM	0.135	415
ADSM	0.122	377
GSN	0.121	372
SYFY	0.118	363
NAN	0.114	351
BET	0.112	346
FX	0.109	335
AMC	0.108	333
NICK	0.106	325
TRAVEL	0.098	301
NATGEO	0.096	295
OXYGEN	0.095	293
APL	0.095	292

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