

# Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

## Win-Win: Comcast Says There's Opportunity in Sports Moving Off Linear

Sporting events like "Thursday Night Football" moving to streaming isn't all negative for cable providers like **Comcast**, the company said on its 4Q22 earnings call Thursday.

Those comments came as the MVPD's leadership revealed higher data usage across its entire customer base. Its residential broadband-only customers are now consuming nearly 700 gigabits of data each month and roughly one-third of its broadband subscribers are subscribing to gigabit-plus products. And as more must-watch programming is snatched up by digital-first companies, households will be incentivized to purchase broadband plans at higher speed tiers to ensure they're able to view without interruptions.

"You look at usage, you look at it right now, the entire long-term opportunity whether it's a couple more sporting events that go towards streaming, it just points towards you need better broadband," **Comcast Cable** CEO *Dave Watson* said. "So from our competitive situation... I think we're focused on our great network, we'll stick with this network. We're going to continue to invest in that."

Comcast recorded 26,000 broadband customer net losses in the quarter, but some of those losses are due to the impacts of Hurricane Ian, which slammed Florida, Georgia and the surrounding areas in September. Excluding that negative impact, Comcast estimates that total broadband net additions were 4,000. 4Q22 revenue rose 0.7% to \$30.6 billion. Comcast's

quarterly results include severance expenses booked in each of its businesses totaling \$638 million. No additional layoffs are expected to come this year.

"We offered voluntary retirement across the company, something we do on a periodic basis which has its benefits, obviously, of giving more opportunities for younger talent as well as some of the tactical situations we have in select businesses to make sure we're as efficient as we can be heading into uncertain times," President *Mike Cavanagh* said. "We've executed against all these things as we roll into 2023, so it's behind us."

Comcast Chair/CEO *Brian Roberts* didn't have much to share on **Xumo**, Comcast's jv with **Charter** that aims to create a national streaming platform. The only details revealed during the call were that early discussions with a variety of partners have been positive and Roberts is really excited about this relationship with Charter. "It's really early at this point in terms of Xumo, but expect more to come and we'll keep you posted along the way," he said.

**Xfinity Mobile** continues to be a spot of sunshine for Comcast, bringing in 365,000 line net additions in the fourth quarter. This quarter was its best since the product's launch in 2017. Video is still on the decline with customer net losses coming in at two million, but growth at **Peacock** is offsetting the weakness in the traditional linear business.

### PEACOCK NABS 20 MILLION PAID SUBS

**Peacock** is continuing to gain subscribers, surpassing the 20 million mark at the end of 2023. Peacock paid subscriber net additions in the U.S. were five million for 4Q22 thanks to its

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original series and sporting events like the 2022 FIFA World Cup. Media revenue increased 2.6% YOY to \$6 billion thanks to higher advertising revenue at Peacock as well as rising distribution revenue from the Peacock subscriber gain and contractual rate increases. **NBCU** CEO *Jeff Shell* said on **Comcast's** 4Q22 earnings call that he's more confident than ever that leadership made the right choice when it came to the streaming business model and the size of its investment in the product. "We could not be more positive about our trajectory so far. We're right where we expect it to be as far as investment and we're well above where we expect it to be as far as paid subs," NBCU he said. "We will hit our peak spend this year and then improve steadily from there. We wouldn't be making the investment if we didn't see the investment in Peacock alone delivering return over time."

#### NEWSMAX TELLS DIRECTV THE FIRST ISN'T FIRST

The **Newsmax-DirectTV** saga entered Phase 2 Thursday with the MVPD announcing the upcoming launch of conservative opinion and commentary network **The First** across DirecTV, DirecTV Stream and U-verse. The news had many asking what's that, but to be fair, folks were probably asking the same thing when Newsmax and **One America News** launched nearly a decade ago. Newsmax's response: "You can't replace a Cadillac with a Honda. The facts remain: DirecTV dropped two of the most popular conservative channels in the past year, replacing them with a channel that has no rating—while still carrying over 20 liberal-leaning news channels." DirecTV didn't describe the carriage terms, but it sounds like it's a free channel based on the fact it will be available to watch online for free at [TheFirstTV.com](http://TheFirstTV.com) and as a FAST channel through various streamers. It was Newsmax's attempt to go from a free

channel to paid that caused DirecTV to balk. DirecTV represents The First's first distribution outside streaming. Serving as CEO of the net is *Christopher Balfe*, no stranger to conservative networks. Balfe was CEO for a time for **TheBlaze**, *Glenn Beck's* 24-hour cable channel which launched in 2012 and shut down in 2019. The First initially launched on **Paramount's Pluto TV** in October 2019 and includes programs such as "No Spin News with Bill O'Reilly" and "The Liz Wheeler Show."

#### TROUBLE AHEAD FOR DSG

As it struggles with declining pay TV subscribers and questions from major sports leagues about its volatility, **Sinclair's Diamond Sports Group** is reportedly preparing for bankruptcy. *Bloomberg* [reported](#) Wednesday that DSG—which operates the 19 **Bally Sports** RSNs and the DTC product **Bally Sports+**—is facing \$8.6 billion in debt and will likely skip \$140 million in interest payments that are due in mid-February in order to begin a restructuring plan. DSG declined to comment on the report. The restructuring will entail turning much of the debt into equity through a pre-arranged Chapter 11 process, according to *Bloomberg*, which also states DSG is hoping to emerge from restructuring by May or June. Once it does, the groups that own DSG will look to sell, signaling a future shakeup in the RSN business that stretches **MLB**, the **NBA** and **NHL**. Another facet of the transition plan would be to offer a new streaming service that would allow fans to watch individual games, but with **MLB** [making hires](#) to improve game distribution, that could throw a wrench in DSG's plans. Sinclair purchased **Fox Sports'** RSNs in 2019 while cord-cutting was continuing to rise, which led to the eventual development of its DTC service. Sinclair hired



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**LionTree** and **Moelis** in recent months to provide guidance on deleveraging and strategic partnerships for DSG.

### WAITING FOR GIGI

There doesn't seem to be any end to the controversy over *Gigi Sohn's* nomination to serve on the **FCC**. Case in point, tabloid *The Daily Mail* [published](#) an article Thursday headlined: "Biden's FCC nominee Gigi Sohn sits on board of nonprofit that wants to uphold online sex work and that honored an OnlyFans dominatrix who boasts about urinating on faces." Well, that's an attention-grabbing headline... The Daily Mail piece is referring to Sohn's work with the **Electronic Frontier Foundation**, which is dedicated to digital privacy, free speech and innovation. Its EFF Pioneer Awards have also honored Sen. *Ron Wyden* (D-OR), WikiLeaks leaker *Chelsea Manning* and two California state senators who introduced the California Electronic Communications Privacy Act. FCC Chairwoman *Jessica Rosenworcel* said Thursday that she hopes Sohn is able to move through the process. "She is a nominee who know this agency well and we wish her the best as she navigates this process on Capitol Hill," she said, adding that despite only having four commissioners the agency has made "enormous progress" on issues such as the digital divide, national network security, spectrum and broadband mapping. "We have done a lot and we will continue to plow forward no matter who sits here and how many we have. But I know that we're built to operate with five and I hope that happens sooner rather than later."

### BREEZELINE LAUNCHES CLOUD TV IN OHIO

**Breezeline** is rolling out its cloud-based integrated streaming service Breezeline Stream TV in Cleveland and Columbus, Ohio. Viewers can access live channels, on-demand programs, up to 300 hours of DVR recordings and streaming apps such as **Netflix**, **HBO Max** and **Disney+**. Current Breezeline TV customers will be transitioned to the platform beginning this month, with the company expecting to complete the conversion in late summer.

### SEGRA UNVEILS SMART WIFI

Fiber network company **Segra** introduced a solution that interacts with customers in real time and helps maximize marketing results. Called Smart WiFi, it has three packages to optimize a venue's network: Analyze Smart WiFi, which provides insights into a business' WiFi solution; Analyze Amplify, which lets businesses who provide WiFi earn additional revenue through advertising and sponsorships; and Engage Smart WiFi, which allows businesses to collect customer insights and then deliver targeted content.

### CARRIAGE

**CraftsyTV** is being launched on the FAST platform **Xumo Play**, coming with tutorials, demonstrations and how-to videos on various creative activities like knitting, baking, painting, wood-working and more. The channel was previously [purchased](#) by **Comcast NBCUniversal** in May 2017 before being renamed **Blueprint**. Three years later, the service [closed its doors](#), but months later was picked up by its current owner TN Marketing.

### MUST READ

*Benjamin Hall*, the **Fox News** correspondent who was [injured while covering the war in Ukraine](#), is releasing a memoir "SAVED: A War

Reporter's Mission to Make It Home" on March 14. The book's release date marks one year after Hall and two other Fox News staffers were in a vehicle that came under fire, which wounded Hall and killed cameraman *Pierre Zakrzewski* and journalist *Oleksandra Kuvshynova*. The story will discuss Hall's experience on the frontlines of war, his rescue from Ukraine and his ongoing recovery.

### FIBER FRENZY

**WOW!** has begun adding customers in greenfield market Altamonte Springs, Florida. Residents can now subscribe to WOW!'s fiber services that come with symmetrical internet speeds of up to 5 Gbps as well as free professional installation, a Visa rewards gift card and a subscription to **HBO Max** (for select tiers of service). It's the company's first installation and activation of customers in central Florida, with WOW! already expanding to Seminole and Orange County. – **Ritter Communications** is bringing its telecom and advanced cloud solutions to Jackson, Missouri, in a self-funding \$2.3 million project that's scheduled to finish in February. Once complete, Ritter will become the first company to bring XGS-PON technology to the community, which will enable speeds of up to 100 Gbps.

### PROGRAMMING

The Puppy Bowl is back for a 19th year on Feb. 12 at 2pm, and for the first time ever, it'll be simulcast across **Animal Planet**, **Discovery Channel**, **TBS**, **HBO Max** and **discovery+**. **ESPN** anchor/commentator *Steve Levy* will be among those featured in the program, which will have 122 puppies and 67 shelters and rescues from 34 states, of those include a Native American organization—another first for the Puppy Bowl.

### DOING GOOD

**DISH** is partnering with the Wounded Warrior Project to create a video series called "Continuing to Serve." The series will feature six veterans who overcome daily obstacles to help their respective communities. The first [video](#) can be seen on **Facebook**, **YouTube** or **DISH Studio Channel 102**, and the remaining five will be released throughout the year. – **DirectTV** is hosting an invite-only screening of "Aliens Abducted My Parents and Now I Feel Kinda Left Out" for families and staff workers of the Ronald McDonald House Charities of the Intermountain Area. The screening is part of DirecTV and RMHC's multi-year partnership that was originally announced in November and will take place at the Megaplex Theatres in Salt Lake City on Jan. 28 at 3pm. – Applications are now open for **MACTA's** Weary Scholarship and Pathfinder Award. The \$3,000 [Weary Scholarship](#) will be given to a high school senior, eligible to enroll in college or currently enrolled in at least 12 credit hours. The [Pathfinder Award](#) recognizes those who have made an impact on the cable industry and has been active for at least 20 years. Deadlines for submissions are March 27 and Feb. 25, respectively.

### PEOPLE

**Warner Bros. Discovery Sports** SVP, Talent Relations and Special Projects *Tara August* is departing the company at the end of February after 18 years with the organization. WBD is upping *Nate Smeltz*, who was previously SVP, Global Communications, to SVP, Global Communications and Talent Relations for WBD Sports.



# PROGRAMMER'S PAGE

## Welcome to The Greybourne

“Only Murders in the Building” has The Arconia. **Freeform**'s upcoming mystery series “The Watchful Eye” has The Greybourne. While The Arconia is actually Upper West Side apartment building The Belnord, The Greybourne is a pretend apartment created on a Vancouver soundstage. Yet it still manages to convey a sense of mystery, luxury and foreboding. “I thought of the building as a character immediately in homage to the Bramford in ‘Rosemary’s Baby’ or the Overlook Hotel in ‘The Shining’ or even Downton Abbey. There were so many opportunities to make the building feel both majestic and alluring,” showrunner *Emily Fox* told **CFX**. “This [building] is the dream and yet underneath it is this terrifying basement full of secrets, which felt metaphorical. This is the allegory of the American dream, right? It’s this all of this beauty built on top of this sort of like seedy, terrifying little maze of horrors.” Oh, and what a tangled, twisty mess of cobwebs of deceit that have taken up residence at The Greybourne. The Watchful Eye centers on Elena Santos (*Mariel Molino*) finagling her way into the imposing Manhattan apartment building as a live-in nanny for a wealthy widower (*Warren Christie*) and his son (*Henry Joseph Samiri*). It doesn’t take her long to figure out that the building and those inside of it are full of secrets and ulterior motives. Of course, Elena’s not showing all her cards either. That’s the beauty of a thriller, though Fox acknowledges it can be challenging to provide the audience with enough intrigue without giving away spoilers. “To me, there’s a really fine line between intriguing and baffling. You have to find the right recipe,” she said, giving “Mayor of Easttown” and “White Lotus” props for their tantalizing unspooling. “My goal is to have a Reddit group that talks about the show. And I will have to show more restraint than I’ve ever showed in my life not to go on to that Reddit group and go, ‘you guys, you’re wrong. Some of you are right, but not all of you.’” Watch the two-part premiere Monday at 9pm on Freeform and make your best guess. – *Amy Maclean*

### REVIEWS

“Nova: London Super Tunnel” 9pm, Wednesday, **PBS**. This short program about a new train subway line that will traverse London from East to West is so good you needn’t be a ferroequinologist to enjoy it. The gist of the \$20 billion, 8-year project, and the reason the program is named as such, is that the Crossrail line must pass through a new tunnel underneath London, allowing it to service existing London Underground/Tube stations. For tourists and plenty of Londoners, the kicker is that Crossrail is expected to make the trip from Heathrow Airport, Europe’s busiest, to central London an astonishing 28 minutes. It’s about twice that today using the Tube, when you’re lucky. The project began in 2009, when a London mayor named *Boris Johnson* championed building 26 miles of tunnels underneath the city, as well as below the Thames River. Oh, and what about laying 30 miles of track or removing 4 million tons of Earth underneath and around fragile, historic buildings? All the while avoiding disrupting the Tube, the world’s first subway (opened in 1863). Perhaps the program’s best quote in the program comes from a worker, who likens building Crossrail to performing open heart surgery on a patient who’s awake. Our favorite innovation: applying concrete through a gun that sprays it so fast it nearly dries on contact. – *Seth Arenstein*

| BASIC CABLE         |              |             |
|---------------------|--------------|-------------|
| P2+ PRIME RANKINGS* |              |             |
| (01/16/23-01/22/23) |              |             |
| MON-SUN             | MC           | MC          |
|                     | US           | US AA       |
|                     | AA%          | (000)       |
| <b>ESPN</b>         | <b>0.838</b> | <b>2617</b> |
| <b>FNC</b>          | <b>0.626</b> | <b>1955</b> |
| <b>MSNBC</b>        | <b>0.301</b> | <b>938</b>  |
| <b>HALL</b>         | <b>0.283</b> | <b>884</b>  |
| <b>HGTV</b>         | <b>0.276</b> | <b>863</b>  |
| <b>INSP</b>         | <b>0.221</b> | <b>690</b>  |
| <b>HIST</b>         | <b>0.214</b> | <b>668</b>  |
| <b>TLC</b>          | <b>0.209</b> | <b>653</b>  |
| <b>TBSC</b>         | <b>0.186</b> | <b>580</b>  |
| <b>USA</b>          | <b>0.181</b> | <b>565</b>  |
| <b>FOOD</b>         | <b>0.173</b> | <b>540</b>  |
| <b>TNT</b>          | <b>0.168</b> | <b>524</b>  |
| <b>DISC</b>         | <b>0.163</b> | <b>510</b>  |
| <b>A&amp;E</b>      | <b>0.154</b> | <b>480</b>  |
| <b>ID</b>           | <b>0.150</b> | <b>467</b>  |
| <b>TVLAND</b>       | <b>0.148</b> | <b>461</b>  |
| <b>ESPN2</b>        | <b>0.145</b> | <b>453</b>  |
| <b>CNN</b>          | <b>0.142</b> | <b>442</b>  |
| <b>GSN</b>          | <b>0.123</b> | <b>385</b>  |
| <b>LIFE</b>         | <b>0.121</b> | <b>379</b>  |
| <b>REELZ</b>        | <b>0.110</b> | <b>344</b>  |
| <b>WETV</b>         | <b>0.104</b> | <b>323</b>  |
| <b>BET</b>          | <b>0.100</b> | <b>313</b>  |
| <b>BRAVO</b>        | <b>0.099</b> | <b>309</b>  |
| <b>NATGEO</b>       | <b>0.095</b> | <b>297</b>  |
| <b>HMM</b>          | <b>0.095</b> | <b>297</b>  |
| <b>AMC</b>          | <b>0.094</b> | <b>293</b>  |
| <b>OXY</b>          | <b>0.091</b> | <b>283</b>  |
| <b>FX</b>           | <b>0.090</b> | <b>280</b>  |
| <b>NAN</b>          | <b>0.081</b> | <b>252</b>  |
| <b>APL</b>          | <b>0.079</b> | <b>247</b>  |
| <b>SYFY</b>         | <b>0.075</b> | <b>235</b>  |
| <b>TRAVEL</b>       | <b>0.075</b> | <b>233</b>  |
| <b>FXX</b>          | <b>0.074</b> | <b>230</b>  |
| <b>COM</b>          | <b>0.072</b> | <b>225</b>  |

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