

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

All In: Cox Visits Washington to Tout Broadband's Impact

It was one of those odd juxtapositions Washington is sometimes known for. **Cox Communications** President *Mark Greatrex* was in the nation's capital Thursday to unveil a survey about how access to broadband enriches rural Americans' lives at the same time the federal government is preparing for the end of the Affordable Connectivity Program that helped more than 20 million households get connected.

ACP was never mentioned during the event at the National Press Club, even though lawmakers, broadband providers and Americans are trying to figure out what will happen if the broadband subsidy for low-income households is allowed to expire in April. Legislation is on the table that would provide \$7 billion for the program, but its fate is uncertain. **CFX** grabbed Greatrex after the formal presentation to get his thoughts. Of course, he said Cox would be a proponent of re-funding the program, but if the government allows it to lapse, he pledged the provider would "pull all the levers" and "get creative" for those customers. Greatrex added that its one-year-old Cox Mobile service could also be part of the solution, plus the operator has long offered affordable internet through its Connect2Compete program.

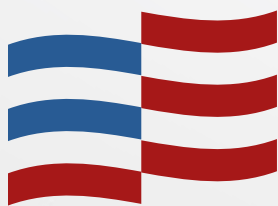
Supporters of ACP can find plenty to back their position that broadband is life-changing in Cox's new [survey](#) of rural customers with recently available high-speed internet in previously unserved communities. A whopping 86% of respondents said the service has improved their lives, 62% said high-speed internet

will improve access to online jobs and remote work and 70% of respondents 30 or younger indicate that they are more likely to stay in their community if it has a high-speed connection.

Over the past year and a half, Cox has expanded its fiber network to reach more than 50,000 households in Arizona, Florida, Kansas, Nebraska, Oklahoma and Virginia that were previously unserved or underserved. "As you dive into the results from this study, you will see that connected communities thrive. But we can't do it just on our own," said Greatrex. "It takes public-private partnership. It takes inventiveness and coming up with new business models like we have with the **Indian Electric Co-op**. I think closing the digital divide does challenge all of us to be creative and collaborative. It's going to take all of us working at the state level, the federal level, the city level, across party lines to get this done together. We've helped 50,000 families and we think we can probably help up to five times that number in the coming years."

Cox has been on the hunt for creative endeavors to bring broadband to those remaining broadband deserts. Last year, it struck a partnership with Oklahoma's Indian Electric Co-op to provide all-fiber internet to its nearly 14,000 members. The IEC-built fiber network remains a co-op asset, with Cox leasing and maintaining operations. IEC CEO *Todd Schroeder* was among those attending the D.C. event. He was upbeat on the work done so far and said more homes are being connected as the project grows.

Cox has a long history of holding these types of events in D.C. In December, Greatrex was at the National Press Club to



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showcase a survey of customers participating in ACP and/or Connect2Compete that found 70% of adults in the programs found a job or better job, 69% reported being able to perform at a higher level at work and 49% have received a promotion or increase in pay. It's also held similar events to showcase internet safety and digital media literacy over the years.

Fitting with Thursday's message from Cox that it takes a village to bring internet to the final frontiers, Secretary *Zechariah Harjo* of the Muscogee Nation and *Joseph Wender*, Capitol Projects Fund Director for the **U.S. Department of Treasury**, also took the stage. "One of the ways that we're demonstrating public-private partnerships is not only with high-level partnerships with companies like Cox Communications, but then also becoming the service provider ourselves in areas that make sense and developing an internal capacity to operate an ISP where it doesn't make sense for a private company like Cox to do so," said Harjo, who noted that the nation is developing a comprehensive internet buildout plan with a current valuation of at least \$100 million.

Wender highlighted how the Capitol Projects Fund, a cousin of the \$42 billion BEAD program, has approved nearly \$10 billion in broadband projects that are required to be completed by the end of 2026. "I'm proud to say that states estimate that as a result of our investments, we'll be reaching over 2 million locations," he said, encouraging public-private collaborations. "The model is providing capex support to providers to go out to places where they haven't been before, or they haven't upgraded before, to make sure that we're having fast service for all. You need ISPs of all sizes. You need innovative solutions."

HULU PREPARES TO CRACK DOWN ON PASSWORD SHARING

Hulu is taking a page out of Netflix's book when it comes to password sharing. It has begun sending emails to customers and notifying them of changes in their subscriber agreements that would give the streamer more flexibility to implement password sharing restrictions. "We're adding limitations on sharing your account outside of your household, and explaining how we may assess your compliance with these limitations," the email to customers said. The new terms went into effect on Jan. 25 for new subscribers, but existing subscribers won't be subject to the new provisions until March 14.

FRONTIER CELEBRATES SAVING CUSTOMERS TIME ON CALLS

Frontier has been putting in the work to improve customer satisfaction, and it announced a major milestone toward that

Thursday. It reduced customer service calls by more than two million in 2023, and it [claims](#) it saved customers 50 collective years on the phone as a result. Frontier has focused on improving operations and launched digital, self-service tools over the past year to make those great strides forward.

VERIZON LAUNCHES 5G HOME INTERNET FOR PREPAID SUBS

Total by Verizon, a prepaid no-contract wireless provider under the Verizon umbrella, is entering the broadband market. New and existing mobile wireless customers can sign up for unlimited 5G Home Internet service with plans starting at \$45/month with AutoPay. That plan offers speeds up to 200 Mbps, and customers must also purchase a home internet router from Verizon for \$99.99 to receive service. A bundle for unlimited wireless and 5G Home Internet is available at a starting price of \$80/month.

NIELSEN'S MEASUREMENT WINS

Nielsen had a pair of announcements Thursday, revealing it's expanding coverage of its National TV out-of-home panel in 2024, a move it says will help fully represent all U.S. TV households. It's adding homes to its footprint of portable people meter wearables technology, taking Nielsen's out-of-home coverage from 65% to 100%. Nielsen plans to provide impact data from the move in 4Q24, just in time for the 2025 Super Bowl. Nielsen also reached a multi-year extension with Nexstar to continue providing local and national TV measurement services across Nexstar's media business, which includes **The CW Network**, **NewsNation** and 200 stations across 116 local markets. Nexstar will keep using Nielsen as its preferred provider of currency-grade TV audience data. It'll also gain access to Nielsen's Big Data + Panel measurement approach, which combines its scale of homes with representative people-powered panels.

VYVE BROADBAND EXPANDS WITH ATOM ACQUISITION

Vyve Broadband is expanding its presence in Oklahoma, acquiring Atom Broadband's assets in Newkirk, Stratford and Kiowa. The purchase includes residential and commercial assets, and Vyve plans to expand to surrounding communities soon.

RATINGS

Spectrum News checked in as the most-watched news network among Spectrum households in January, recording an average of 2 million daily viewing households across

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linear and digital platforms. Highlights include Dallas and its seven Nielsen-rated markets having better month-over-month viewership growth than the broadcast nets, **CNN** and **MSNBC**, and Tampa having higher Nielsen growth than **ABC**, **CBS** and **CNN**. – **ESPN** studio shows carried their viewership momentum into 2024. “Get Up” had its most-viewed month ever with an average of 500,000 viewers per show in January. That’s good for a 12% increase YOY and beats the previous record of 467,000 set in November 2023. Jan. 15 also saw the show’s most-viewed episode ever with 979,000 viewers. “First Take” also had its most-watched month ever at 680,000 viewers—up 21% YOY and beats the old record by 11%. “The *Pat McAfee Show*” rounded out January with 506,000 daily viewers across linear and its **YouTube** simulcast. The program accumulated an average of 10.4 million daily views for the month across all platforms, which also includes YouTube and **TikTok**.

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CARRIAGE

Philo marked another milestone as it rolled out its platform onto **VIZIO** Smart TVs. Philo is already available on **Roku**, **Amazon Fire TV**, **Apple TV**, **Samsung TV** and more.

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FIBER FRENZY

Greenville, N.C., is now a certified Gigabit City by **Metronet**. The company launched its fiber network to a majority of households throughout the city. To-date, Metronet has installed over 400 miles of fiber optic internet in Greenville in what was a fully funded \$46 million project. Metronet is commemorating things with a \$10,000 donation to the Greenville Branch of the Food Bank of Central & Eastern North Carolina. – Residents and businesses in Rome, NY, will gain access to **GoNetspeed**’s internet service next year. The company expects to begin construction on infrastructure in 2025, with the first customers connected that same year as well. GoNetspeed embarked on a \$10 million investment to bring its fiber offering to over 10,000 locations. It follows Tuesday’s news that GoNetspeed is beginning construction in Utica, New York, this spring, which will bring its internet product to more than 38,000 locations in a privately funded \$60 million investment. Customers in Utica will be able to access GoNetspeed internet starting this summer.

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PROGRAMMING

Alison Sweeney and *Victor Webster* are reuniting in **Hallmark Movies & Mysteries**’ “One Bad Apple: A Hannah Swensen Mystery” which will premiere later this year. The movie is based on *Joanne Fluke*’s book “Apple Turnover Murder.” – **Lifetime** will debut “Hunting Housewives” on March 9 at 8pm. The movie follows four housewives stranded in the wilderness following a plane crash. Additionally, Lifetime greenlit a new original film “Mommy Meanest.” It’s slated to premiere later this year.

What We’re Listening to

With earnings season upon us, we’re listening to an episode of “[The Business Brew](#)” podcast featuring MoffettNathanson’s *Craig Moffett*. The ep actually dropped back in December, but it’s just as timely now, and perhaps more so, because you can immediately compare what was said to what’s being reported for 4Q23. Spoiler alert: the podcast’s name is a nod to host/private investor *Bill Brewster* rather than drinking brews and talking business, though we’d urge him to consider that addition.



Moffett’s known for his bullish stance on cable, but he’s come by it after decades of thoughtful analysis. “I don’t think anyone should have a bullish story on cable based on the idea that broadband net adds are going to accelerate. If that’s what you’re waiting on, find something else to invest in because you’re making a mistake,” he told Brewster. “Broadband net adds are not going to accelerate... If broadband was the only business cable was in, it wouldn’t be terribly interesting.”

But it’s not, with Moffett arguing that cable has the leg up when it comes to convergence. “It’s easy to think everyone has a convergence story—cable’s got their convergence story as they offer wireless and AT&T’s got their convergence story with their fiber and Verizon’s got fiber and blah, blah, blah. That’s simply not correct,” he said. “AT&T has a wireline footprint that covers about 42% of the United States. Of that today, about a third of that is fiber. Let’s say it eventually gets to half fiber. So, let’s say they eventually have a footprint that’s 21% nationally covered by fiber. How in God’s name do you take a national wireless product and try to sell it in a bundle with fiber where you’ve only got fiber in 21% of the country?”

Moffett put Verizon at about 13% of the country with fiber and T-Mobile at 0%. “Charter and Comcast can do it everywhere they are. That is ‘any customer we can reach, we can offer them a bundle of fiber and wireless and no one else in the market can,’” he said.

That brings us to those impressive fixed wireless adds were seeing coming out of T-Mobile and Verizon. The problem is it’s a short runway, with T-Mobile already about halfway to its target of 8 million FWA subs by 2025, Moffett said, noting the 3 major players have spent roughly \$650 billion in capital investment for capacity upgrades. On the flip side, cable can lower its costs in wireless quite substantially by offloading traffic to its network.

While much of the episode will cover familiar ground for MoffettNathanson subscribers, we did appreciate some color on the firm’s return to independent status after the bankruptcy of SVB Financial Group. “I think we were incredibly fortunate to avoid some fairly obvious landmines or what could’ve been landmines. We were only there a year or so, and hadn’t therefore gotten so fully integrated that when SVB went bankrupt it was all that difficult to disentangle what we had. We still had largely our own everything from compliance to technology platforms,” he said. “It certainly had its share of headaches... but we have back what we really enjoyed, and what I think worked well for us, which is the independence to be able to focus entirely on best-in-class research.” - Amy Maclean

PROGRAMMER'S PAGE

Tubi Shatters the Glass Ceiling

There's no denying the rapid ascent of women's sports in recent years, and the **WNBA** has often found itself at the forefront of that general rise in popularity. **Tubi's** latest documentary "Shattered Glass: A WNBPA Story" premiered Wednesday, doing more than illustrating the glass ceiling that the league and the Women's National Basketball Players Association continue to break. It showcases the multi-faceted archetypes the WNBA has and the passions that fuel players both on and off the court. With a star-studded list of former MVPs featured in the doc—*Jonquel Jones, Nneka Ogwumike, Breanna Stewart and Sheryl Swoopes*—the film's director *Andrea Buccilla* told **CFX** they each serve as representatives for the different archetypes, including those involved in advocacy, business as well as the aspect of motherhood for some. But while the doc peers at the lives of these basketball stars, it doesn't shy away from the narrative that the WNBA dealt with for many years. In fact, it opens with a blunt timeline of the league's formation in 1997 and the hype surrounding it, to the decline in funding and subsequent lack of overall access before its recently gained momentum. "We didn't want to make a fluff piece. We didn't want to come out and make it seem like, 'Hey, we're awesome. You should support us.' No. They're fully aware of what the narrative has been, and now they take responsibility of continuing this rise very, very seriously," Buccilla said. There is an underlying business aspect, though, with much of the doc centered on the league's collective bargaining agreement with players and the intricate details that go into such a deal. It's all part of painting a complete picture of these athletes, who each have plenty of stories to tell. "Hopefully people get the impression that these women are not begging you to be interested in them for no reason. They're not begging for your eyeballs for no reason. They're just really working very, very hard at their craft and their own personal careers. I'm happy to see that it's starting to pay off for them," Buccilla said. – *Noah Ziegler*

REVIEWS

"Masters of the Air," new eps Fridays, **Apple TV+**. This *Steven Spielberg-Tom Hanks* addition to the "Band of Brothers" (2001) and "The Pacific" (2010) family of WWII vehicles was, like its illustrious sibs, slated for **HBO**. Alas, the pandemic and a bulging budget scuttled that. Still, it feels HBO in the best ways. Immediately you see where that \$250mIn budget went. Visually, scenes in and around the 100th Bomber Group's B-17s are excellent, with Oscar-winning special FX chief *Stephen Rosenbaum* helming. And it's an all-star cast, with *Austin "Elvis" Butler, Barry Keoghan* of "Saltburn" and eventually *Ncuti "Dr. Who" Gatwa*. Quickly you're wise about the bombers' precarious existence, flying from England in broad daylight, hoping to evade flak and Nazi fighter aircraft. You also learn that navigator Harry Crosby (a delightful *Anthony Boyle*) should skip pre-flight meals. Like Band and Pacific, there are many characters. Plus "Masters" adds difficulty; when higher than 10K feet they're masked, obscuring faces. Still, it's exciting if overly nostalgic TV, gorgeously filmed. – "The Greatest Night in Pop," streaming, **Netflix**. It's an animated *Lionel Richie* describing the extravaganza "We Are The World." Yet there's also outrageous footage, including *Michael Jackson* practicing, it's beautiful. *Paul Simon* has the best line. Surveying the plethora of talent on stage, he quips, "If a bomb falls on us, *John Denver's* back on top." – *Seth Arenstein*

BASIC CABLE		
P2+ PRIME RANKINGS*		
(01/22/24-01/28/24)		
MON-SUN	MC	MC
	US	US AA
	AA%	(000)
FNC	0.673	2120
MSNBC	0.374	1179
HGTV	0.271	855
HALL	0.230	726
HIST	0.223	704
TBSC	0.211	665
ESPN	0.195	615
DISC	0.195	614
CNN	0.187	591
INSP	0.181	571
TNT	0.177	557
FOOD	0.169	533
TLC	0.168	529
USA	0.166	522
TVLAND	0.146	460
ID	0.128	403
REELZ	0.121	382
A&E	0.120	379
BRAVO	0.119	377
GSN	0.118	371
HMM	0.107	339
LIFE	0.105	332
FX	0.099	313
BET	0.097	307
ESPN2	0.096	302
OXY	0.094	297
WETV	0.092	291
SYFY	0.088	277
NWSMX	0.086	271
NAN	0.083	261
ADSM	0.082	258
AMC	0.078	247
TRAVEL	0.077	244
NATGEO	0.073	229
PRMNT	0.070	220

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

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