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What the Industry Reads First

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From the FCC: Assessing the Network, Deadlines and More

With the country relying on America's telecommunications networks like never before, there are continuous questions over how they are performing. Senior **FCC** officials said Monday that there are no imminent plans to start FCC status reports on network performance, but added that nothing precludes the agency from doing so if the situation changes. For now, industry associations are starting to report metrics, with the agency encouraging public reporting. Officials described these initial reports as mainly positive. **Comcast** said Monday it has seen a 32% increase in peak usage vs a baseline of March 1, with some areas up 60%. Downstream peak appears to be moving from 9pm to between 7pm-8pm while upstream peak is moving from 9pm to between 8am and 6pm in most cities, it said. Comcast said that its network has been able to handle the changes, and that network traffic increases in the first cities that issued stay-at-home orders, such as Seattle and San Francisco, are beginning to plateau (See "Comcast Network Stats" below for more details on Comcast's performance). **NCTA** hasn't released metrics for the cable industry as a whole, but a spokesperson said the association is working on something. Some of the trends the FCC has seen include wireless providers having more usage on the voice side than data (since people are staying home and are connected to fixed broadband), urban centers seeing less usage in a typical day with suburban areas seeing an increase, and, of course, an increase in traffic during the day. "Network operators built their networks with flexibility. As they see these patterns, they are able to adjust," said one FCC official in a call with reporters. The FCC has granted requests recently to allocate **DISH** spectrum to **Verizon**, **AT&T** and **T-Mobile** on a temporary basis. Wireless providers have indicated the additional spectrum isn't about service outages, but more for relieving potential congestion and providing better quality service during the pandemic, FCC staff said. The agency has announced a few comment extensions recently, including for its report on Accessibility Under the 21st Century Communications and Video Accessibility Act, but don't look for it to provide a blanket waiver for everything. Staffers said waivers will be on a case-by-case basis with the agency looking proactively for rules that can be waived. **NCTA**, **ACA Connects** and **US Telecom** have asked for a six-month extension of the effective date of the transparency in billing provisions of the TV Viewer Protection Act, which would move the deadline for compliance to Dec 20 instead of June 20. While the FCC has pushed back some auctions, including Auction 105 (priority access licenses in the CBRS band), the C-band auction re-

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mains on track. “We still have plenty of bandwidth and time to do that auction. We don’t believe it’s necessary to postpone an auction set to begin in early December,” an FCC official said, adding that if people had compelling reasons to seek a delay, the Commission would listen.

Comcast Network Stats: Other details from **Comcast’s** network report mentioned above: VoIP and video conference is up 212%, while VPN traffic is up 40%. Gaming downloads are up 50% generally and 80% during new releases. There’s a 38% increase in streaming and web video consumption. VOD has been hitting record highs, up 25% YOY, while linear video consumption is up 4 hours to 64 hours per week. Voice remote queries have topped 50mln some days, with nearly a 50% increase in voice remote requests for “free movies.” Xfinity mobile has seen a 10% decline in LTE data usage and a 24% increase in mobile data usage over WiFi.

WOW! CEO Hospitalized: **WOW!** CEO *Teresa Elder* was admitted to a Denver area hospital Friday after testing positive for COVID-19. The company said she had been working remotely since March 16 following the company’s decision to transition all non-essential employees to work-from-home status. While Elder recovers, CIO *Bill Case* will serve as acting CEO and **WOW!** board chmn *Jeff Marcus* will temporarily take on a formal leadership role as executive chairman. – On Saturday, **The Madison Square Garden Company** said CEO *Jim Dolan* (former **Cablevision** CEO) had tested positive for the virus. “He has been in self-isolation and is experiencing little to no symptoms. He continues to oversee business operations,” the company said.

Telehealth Stimulus Money: Remember that \$200mln set aside for telehealth in the \$2 trillion COVID-19 stimulus bill? **FCC** chmn *Ajit Pai* circulated an order Monday on how to spend it. If it’s adopted by his fellow commissioners, it would help eligible health care providers purchase telecommunications, broadband connectivity and devices necessary for providing telehealth services. FCC officials said the plan is designed to provide a lot of flexibility for hospitals and other providers to design telehealth projects that best meet their needs. That could mean using money for remote patient devices, such as a pulse oximeter, or providing broadband connections for elderly patients who don’t have one for telehealth visits. The proposal would put a streamlined application process in place, with the Wireline Competition Bureau making decisions on a rolling basis. There would not be a requirement for competitive bidding because that could delay action. An FCC official said the agency doesn’t anticipate giving more than \$1mln to a single project. Eligible providers include nonprofit hospitals, rural health clinics, medical schools, health departments and community health centers. On Monday, Sen *Ed Markey* (D-MA) asked that Medicare rules be expanded to include audio-only telehealth services during the pandemic. Current rules require Medicare beneficiaries to receive telehealth services through video conferenc-

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ing on laptops, tablets and other devices, but excludes phone conversations.

COVID-19 Commercials: Companies are scrambling to update commercial messaging in light of COVID-19. **Cox Business** produced a new spot in about a week that began appearing some on digital and social platforms this weekend. It begins running as a TV spot in Cox markets this week. “Business owners, we know you need to keep going, keep reaching, keep fighting, and keep doing business,” the ad begins. “You can’t stop, so we won’t stop. We’ll keep you connected.” Other companies with COVID-19 messaging in the marketplace include **GoDaddy** with its #OpenWeStand message aimed at business owners.

Iger Forgoes Salary: *Bob Iger*, now **Disney**’s executive chmn, will forgo his entire Disney salary during the coronavirus pandemic, and new CEO *Bob Chapek* will take a 50% paycut. Disney will reduce salaries of its vps by 20% and evps and above by 30%, effective April 5. Disney announced Friday it will keep its parks in CA and FL closed indefinitely. **Credit Suisse** cut Disney estimates amid the widening pandemic, lowering revenue by \$7.6bln to \$71.7bln. “There remains virtually no visibility as to when sports & Hollywood content production will resume and reopenings for Theme Parks (US now closed indefinitely) & theaters (China just reclosed) will take place—we assume beginning of June,” analyst *Doug Mitchelson* wrote in a note. As for the media business, the depth of ad declines is also uncertain.

TEGNA Offers Yanked: **TEGNA** confirmed Monday that it has received acquisition proposals in recent weeks, but all discussions have ceased due to the COVID-19 pandemic. The broadcaster said it was sent four unsolicited proposals and TEGNA and its advisors engaged substantially with two of the parties, providing them non-public due diligence information. When the coronavirus began spreading and affecting the market, those two parties told TEGNA they were ceasing discussions. “The Board has been, and remains, willing to consider transactions that create compelling value, and our focus now is on helping management navigate through an unprecedented environment,” board chmn *Howard Elias* said in a statement.

Olympics Have New Date: The Tokyo Olympics will now begin July 23, 2021 and end Aug 8, 2021 after they were postponed due to COVID-19. “We fully support the new dates chosen for the Tokyo Olympics and Paralympics by the IOC, IPC and Japanese government,” said a spokesperson from **NBC Sports**. **Comcast NBCU** has broadcast rights in the US, and **Discovery** in Europe.

Comcast Gets Ethernet Contract: **Comcast Business** has been awarded a \$9.3mln, 10-year contract by the US Defense Information Systems Agency to establish commercial ethernet gateways to create ethernet connections for its defense information systems network in the northeastern US. The DISN’s 17K legacy, point-to-point public switched telephone network circuits will be replaced with ethernet connections, providing coverage to 48 states and DC.

Sports (Sometimes Repeat) Programming: Even without live sports, there’s still plenty to watch. Beginning Tuesday at 7pm, **ESPN** will showcase baseball’s greatest games in “MLB Encore Tuesdays.” The event will run every Tuesday through April. The first game features the Atlanta Braves at the NY Mets in NYC’s first pro-sports event after 9/11. The net will also debut “NBA Wednesday Nights” beginning Wednesday at 7pm. The doubleheader event features iconic games at 7pm and 9:30pm throughout the month. -- In honor of Women’s History Month, **ESPN2** is airing eight hours of US Women’s National Soccer Team programming Monday night, with four classic matches featuring legends including *Abby Wambach*, *Mia Hamm* and *Julie Foudy*. Programming kicks off at 6pm with the 2009 USA vs Canada match. -- **NBC Sports** will present “Hockey Happy Hour” from 5-7pm Monday-Thursday this week. Programming includes “Hockey Week in America” highlights, an **EA Sports** NHL simulated matchup between the Capitals and the Blues and games from previous seasons. -- **MSG Networks** will feature the best games from the Knicks 2012-13 season each night this week, as well top games from the Rangers run to the Stanley Cup Finals in 2014.

Coronavirus Initiatives: **ESPN** debuted a coronavirus PSA Monday morning on “Get Up.” The “#oneteam” initiative features 24 ESPN voices speaking from homes across the country encouraging fans to remain vigilant and practice social distancing. -- **Freeform** is debuting “#StayTheFFHome,” encouraging young adults to stay home. In addition to PSAs, the net will marathon series “Everything’s Gonna Be Okay” on Friday at 5:30pm. -- **Hallmark Channel** is releasing a series of videos and social media posts sharing hope and solidarity with viewers, and thanking frontline heroes. -- **Fox News** launched editorial series “America Together” on its linear and digital platforms. The feature will highlight daily uplifting content throughout the pandemic. -- **Fuse Media** is launching its “Be Change” call-to-action, social responsibility initiative, which includes a series of on-air, digital and social media messages encouraging viewers to stay active and mentally stimulated while remaining socially isolated. -- **Telemundo** and **UnidosUS** teamed up for “Coronavirus: La Salud de Nuestras” (The Health of Our Families) Spanish-language teleconference town hall, taking place Tuesday at 6pm.