

Cablefax Daily™

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What the Industry Reads First

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Friend In Me: Broadband's Role in Telehealth's Boom

The telehealth space has boomed since the start of the COVID-19 pandemic, and broadband providers have a critical role to play to ensure that patients are able to connect with doctors near and far. “We have reached the point where we can't have healthcare without connectivity,” **Alaska Native Tribal Health Consortium** CIO *Stewart Ferguson* said during **Cablefax's** Telehealth in the Virtual Age web conference Thursday. “Everything ties into an electronic chart.” And with telehealth, patients can access more healthcare professionals faster and easier than ever before. More than 20% of all primary care visits in June were virtual, but those only occurred because patients had access to stable internet connections. Some broadband providers have already begun working with the healthcare community to develop the real-world applications that can change a patient's wellness journey. **Cox** acquired remote health monitoring provider **Trapollo** in September 2015, and **Comcast** teamed up with **Independence Health Group** to launch **Quil**, a digital health platform, in 2018. Partnerships like those can not only help bring telehealth to more consumers, but help operators ensure their networks can offer the bandwidth needed to keep those applications running optimally. “We really need to bring those two ecosystems together and co-develop,” **SCTE-ISBE** CTO *Chris Bastian* said. “Rather than guessing, if we can be told the forecast of a service provider company... we can better anticipate that and engineer that into our networks.” Some of those conversations are already happening. **SCTE-ISBE** launched its Explorer Initiative in March, which brings together leaders from diverse backgrounds to prepare for future challenges. The program encompasses seven new **SCTE-ISBE** Standards working groups covering everything from AI to telehealth and aging in place. *Kara Mullaley*, **Corning's** community development broadband market development manager, recommended that operators can capitalize on the telehealth space quickly by upgrading business enterprise service levels to medical centers and hospitals. That way, she explained, patients can still go in person for diagnostic care, but also connect via these institutions to specialists all over the world. For those looking to start exploring the telehealth marketplace, *Bonny Roberts*, **Centura Health's** director of portfolio management for business, information technology, encouraged broadband providers to have conversations with everyone from insurance companies to doctors located in remote areas to understand connectivity needs. That conversation should also

The advertisement features a geometric design with overlapping triangles in shades of orange, yellow, and grey. The NAMIC logo is prominently displayed in the upper left. Below it, the text reads "34TH ANNUAL CONFERENCE BUILDING A LEGACY THE FUTURE IS NOW" with a yellow arrow pointing right. The dates "OCTOBER 6 - 9, 2020" and the registration link "REGISTER TODAY AT CONFERENCE.NAMIC.COM" are at the bottom. The background includes faint portraits of diverse individuals.



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Roger Hasson
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be had with patients so that network operators can understand the complete care journey they can help facilitate. There are questions remaining about how legislation and red tape could hold telehealth back from continuing its meteoric rise after the pandemic is over. **Credit Suisse** lead analyst for healthcare technology & distribution **Jailendra Singh** said that some of the regulation relaxations that have incentivized more healthcare providers to offer telehealth appointments aren't likely to stick, but the vast majority will. "Right now, providers are getting paid at the same level as in-person visits. I doubt that is going to continue post-COVID," Singh said. "But all in all, I think the regulatory environment will be much better than what it was pre-COVID."

Dems Want Unlimited Data For Lifeline: A group of 15 House Commerce members are asking the **FCC** to use Lifeline funds to subsidize unlimited voice minutes and mobile data for Lifeline users throughout the pandemic. In a letter to chmn **Ajit Pai** on Thursday, the group wrote, "while the FCC has taken some small steps since March to tweak the Lifeline program's rules, much bolder action is necessary. A strong response is critical given the supreme importance of connectivity while the country continues its efforts to combat the unprecedented and devastating COVID-19 pandemic." The legislators also questioned a draft order from Pai last month changing the minimum service standards required for mobile service data under the program, saying it could result in low-income Americans paying more for mobile service. "Now more than ever, Americans need this Lifeline to support telework, telehealth, education, and other services offered online to keep individuals and our communities safe and healthy," they wrote. "Unfortunately, your proposed rules seem to ignore the fact that coronavirus cases continue to rise, and the country has experienced nineteen consecutive weeks of over one million unemployment claims." The group requested a response from Pai by Sept 3.

fuboTV Sees Growth: In its first quarter since the close of the merger with **FaceBank**, **fuboTV** posted growth across multiple areas. Though fubo reported a net loss of \$99.8mln in 2Q20, the vMPVD saw 53% increase YOY in revenue, reaching \$44.2mln, driven by subscriber growth, subscription revenue and ad revenue. The company ended the quarter with 286,126 subs, a 47% YOY increase. Ad revenue jumped 71% YOY to \$4.3mln. In a letter to shareholders, CEO **David Gandler** said the company expects paid subs to reach between 340K-350K, a 20% YOY, pointing to the recent carriage deal with **Disney**. "Our streaming hours grew over the prior year despite a near total shutdown of sports. This is primarily a result of fuboTV's expanded programming offering for the entire family combined with product innovations that deliver a premium viewing experience not available through traditional television," said Gandler. "We expect streaming hours to grow as sports return. And, with the recent (August) addition of

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Disney Media Networks, including **ESPN**, to our offering, fuboTV has a market-leading 43 of the top 50 Nielsen-ranked sports, news and entertainment networks as well as significant coverage of soccer, NFL, NBA, NHL, MLB and college sports.” FaceBank stock closed up 3.19%.

BC Partners Selling Altice USA Stake: Private equity firm **BC Partners** sold its remaining stake in **Altice USA**. “After the market close today, funds advised by BC Partners elected to sell approximately 17.3 million Altice USA Class A shares, representing all of their remaining stake in the company. Consistent with Altice USA’s share repurchase program, the company elected to purchase approximately 6.9mln of these shares, for a total consideration of approximately \$187mln,” Altice said in a statement. BC Partners was one of the first investors in Altice USA and **Suddenlink Communications**.

Cisco Announces Restructuring: **Cisco** stock tumbled down, dropping 5% Wednesday and 11% Thursday. During an earnings call Wednesday, CEO *Chuck Robbins* announced the company is planning to cut \$1bln in expenses over the next several quarters. CFO *Kelly Kramer* said the majority of cuts would come in operating expenses, with the bulk coming out at the end of 1Q. Cisco said its current-quarter revenue could drop 9-11%, a range of \$11.71bln to \$11.97bln, below analyst expectations of \$12.5bln.

Broadband Adds: The largest cable and telephone providers added 1.245mln net broadband subs in 2Q20, significantly up from 375K adds in 2Q19. According to **Leichtman Research Group**, 2Q20 had the most broadband additions since 1Q12, and cable broadband net adds (1.4mln) were the most in any quarter since 1Q07. **Charter** led the way with 850K adds, the most for any provider in any previous quarter. **Comcast** followed with 323K adds.

Working from Home: It’s no surprise that since the coronavirus pandemic struck, more people have been working from home. In a survey, **Nielsen** found that two-thirds of respondents are working from home full-time due to the pandemic, and as a result of multitasking, daily usage time on TV and digital is up. Traditional wfh’ers (already wfh before the pandemic), spend an average of 10 hours and 27 minutes connected. COVID wfh’ers spend 10:08. In terms of TV and streaming content, news is king, taking up a 57% share (64% of which is local). Nielsen’s survey also found that consumers are actually enjoying the change in routine and working from home, with 40% saying they feel more connected to their community and making more local purchases. More than 70% said that working remotely gives more freedom and flexibility. Only 28% of people working from home since the start of coronavirus said they felt more productive at work in an office, with 72% saying they’ve maintained or increased their productivity at home.

Apple Launching Bundles: **Apple** is reportedly getting ready to deploy a series of bundles that will allow customers to purchase the company’s digital services at a lower monthly price. First reported by *Bloomberg*, the bundles are called “Apple One” and will have multiple tiers. The most basic will include Apple Music and Apple TV+, and another will include those services and Apple Arcade. Pricier options add Apple News+, and another with extra iCloud storage. The company could start offering the bundles as early as October alongside a new iPhone model. The reports sent Apple stock to a record high, closing up 1.77% to \$460.04.

Doing Good: **Comcast** launched the “Internet Essentials Partnership Program” for cities, schools and nonprofits to connect low-income K-12 students to the internet at home. The program includes two months of free internet services for new Internet Essentials customers, and partnerships with schools in Chicago, Atlanta, Sacramento, Pittsburgh, Portland and Arlington give more than 200K students the option to get connected. The program has already signed up 70 schools across the country. Comcast also announced it’s giving all Internet Essentials customers its xFi platform, which allows parents to control and manage their children’s WiFi connected devices. The company also announced plans for a series of virtual national and regional summits in the fall to help tackle the challenges of broadband adoption.

Distribution: SVOD service **Hallmark TV** debuted in the UK on **Amazon Prime Video** on Thursday. The £4.49/month service features original content from **Hallmark Channel** and **Hallmark Movies & Mysteries**. This marks **Crown Media**’s first international SVOD office and the first time a UK audience has access to Hallmark content. -- **Haystack TV** is launching dedicated streaming channels for the upcoming Democratic (Aug 17-21) and Republican (Aug 24-28) National Conventions. The channels will feature content from about 300 local broadcasters, with additional results and analysis from national nets like **ABC News**, **Bloomberg** and **Cheddar**. -- **WE tv** and global unscripted distributor **Off the Fence** re-upped their distribution agreement. The two have been partners for more than a decade.

PROGRAMMER'S PAGE

'Shark Week' Takes a Bite

A global pandemic? Not a problem for Shark Week. Despite coronavirus shutting down travel, **Discovery's** annual programming event delivered more shows than it ever has in its 32-year history. "Travel wasn't possible, and countries were shut down. We couldn't travel crews, we couldn't get permits," said *Howard Swartz*, svp of production and development. Some key locations for Discovery to film include Great White hotspots New Zealand, South Africa and Australia. "The ability for us to get into the field and shoot these sharks, it just stopped," Swartz said. Thankfully, early in the summer some countries started to ease their internal travel restrictions, allowing local crews to get their boots on the ground. "It turned into a really interesting opportunity for the research community and for us to document what changes they're seeing with these sharks, in a world where the constant drumbeat of human activity has dropped significantly," Swartz said. After 32 years, Shark Week continues to provide fresh content, keeping viewers engaged and drawing in a younger audience. "We've used celebrities as a way to bring people into the tent," explained Swartz. "The other thing is the research community itself. It's new technology which has opened up new species, new sharks, new behaviors, new locations. We really have to challenge ourselves every year to keep Shark Week fresh and still be very entertaining." Discovery also takes advantage of the different eyeballs that come to Shark Week to launch new shows. "It's about the types of storytelling and what we do with Shark Week that do bring in that younger audience," said Swartz. "The series team and Nancy Daniels are always very busy figuring out what are the great projects that will keep that audience that come in for Shark Week every year and launch those new shows that will have an impact. That's the overall goal from a programming standpoint." Shark Week runs Aug 9-16. — *Mollie Cahillane*

Reviews: "Martha Knows Best," 10pm, Friday, **HGTV**. Loyal readers know we've mentioned using television as an escape, if only for minutes, from the pandemic. This series from *Martha Stewart* checks that box. With everything viewers are worrying about, a graphic early in this week's show offers the kind of trivia that might bring a smile: "Did you know peacocks are male," it says, and "peahens are female?" Not us. Besides the pleasure of walking around Martha's farm—it's gorgeous—plus seeing our hostess in overalls and gardening clogs, the show's graphics are fun. Stewart instructs a gardener about stepping stones, via video. A graphic appears, offering help: "Stepping stones should be placed 24 inches on center." And the graphic person has a sense of humor. When Martha discusses cutting sod to construct a path for peacocks, she mentions renting a sod cutter, "if you don't own one." A graphic comes up: "Who the heck owns a sod cutter?" Gotta love it. Beyond the humor, and actor *Lupita Nyong'o*, who asks for help with flower arranging, hand it to Stewart: her gardening and landscaping tips are solid. This is a talented person. — Notable: We didn't want "Greenleaf" on **OWN** to end without saying farewell to the megachurch drama from **Lionsgate** that earlier this week bid viewers farewell after four seasons. — *Seth Arenstein*

Basic Cable P2+ Prime Rankings* (08/03/20-08/09/20)		
Mon-Sun	MC US AA%	MC US AA (000)
FNC	1.006	3,093
MSNBC	0.643	1,976
CNN	0.432	1,327
HGTV	0.415	1,277
TLC	0.383	1,177
HALL	0.302	927
ESPN	0.297	914
TBSC	0.284	873
TNT	0.268	824
DISC	0.264	810
HIST	0.256	788
FOOD	0.253	777
ID	0.229	703
USA	0.216	664
INSP	0.215	660
LIFE	0.191	588
TVLAND	0.188	578
A&E	0.175	537
BRAVO	0.169	519
HMM	0.166	509
PARA	0.160	493
ADSM	0.153	469
WETV	0.143	439
FRFM	0.137	422
APL	0.134	412
AMC	0.133	408
FX	0.133	407
GSN	0.132	406
NBSN	0.130	400
SYFY	0.129	397
NAN	0.124	382
TRAVEL	0.117	360
NATGEO	0.116	356
NICK	0.109	334
DSNY	0.102	314
E!	0.096	296
BET	0.095	292
DSJR	0.095	291
MTV	0.093	285
OXY	0.091	280
COM	0.090	277


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

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