

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Charter Shuffle: Bickham Slides to Vice Chair, Winfrey Moves to COO Seat

With *John Bickham* set to retire at the end of 2022, **Charter** elevated *Chris Winfrey* to the COO spot, with Finance EVP *Jessica Fischer* to succeed him as CFO. Bickham will move into the Vice Chairman role. Additionally, Chief Product & Technology Officer *Rich DiGeronimo* will add oversight for Charter's Network Operations to his existing responsibilities. The appointments are effective immediately.

Cablefax recently caught up with Bickham and discussed his career, which included joining Charter in 2012 as COO and helping guide the **Time Warner Cable** and **Bright House** integrations. He was bumped up to President & COO when the acquisitions closed in 2016.

The transactions, which created the second largest cable operator in the U.S., are something he is especially proud of. "I can't think of any other way to go out on a high note than putting these companies together," Bickham told **CFX**. "It's something [CEO] *Tom [Rutledge]* and I have talked about for years. It all worked out."

Rutledge and Bickham have worked together for 30 years at Time Warner Cable, **Cablevision** and now Charter, with Bickham one of Rutledge's first hires. The Time Warner Cable transaction gave them a chance to go back to their early days and do it their way.

That meant backing out of Time Warner Cable's overseas call centers. "We knew we could do a better job with in-house

employees," Bickham said. "We still have a little, tiny bit of domestic outsourced calls, but those are going away this year."

He also followed through on a priority to use considerably less contract labor than Time Warner Cable had. "I couldn't tell you how many thousands of employees we've hired in field operations," he said. "We still have contract labor, but the percentage of work being done is more like 25% versus 55%-60% that existed when we put these three companies together. The amount of work actually has gone down even though we have more customers because service call rates have come down. It's been a pretty virtuous cycle for us to bring that work in house and hire employees to do it who are motivated and feel strongly about working for Charter as opposed to a contractor who really doesn't have any personal feelings about the company."

Of course, for much of the past two years, Bickham and the Charter team have been focused on successfully running a company during a pandemic. Named **Cablefax: The Magazine's MSO of the Year** for 2021, Charter posted unprecedented broadband growth, pledged to raise its minimum wage to \$20 hours by 2022 and even eked out video sub gains in 2020. "I have to say if you have committed leadership, you have a chance to have committed employees. The biggest success for the company really was having a leadership organization (supervisors, managers, directors, VPs) that took their responsibilities very seriously and took care of their employees," Bickham said.

As Vice Chairman, he will advise the executive team, includ-



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ing Rutledge, who praised his leadership and steady hand. New COO Winfrey has been a regular speaker at investor conferences over the years, sharing the company's vision on everything from mobile to CBRs. He now oversees all cable operations across Charter's 41-state footprint. "Over the past 11 years Chris' influence on Charter has expanded far beyond that of a typical CFO; he has been actively involved in our business operations and that deep knowledge, combined with his previous operational experience in Europe, will serve us well as Charter's next chief operating officer," Rutledge said in a statement.

By the way, there must be something magical about 35 at Charter. New CFO Fischer is 35 years old. Winfrey started the CFO gig in 2010 when he was approaching that same age milestone. Fischer joined the company in 2017 as Treasurer. Prior to that, she was a tax adviser for **EY**, who assisted in the TW, Bright House transactions. Earlier this year, she took on new responsibilities to lead Investor Relations, Internal Audit, Procurement, and Corporate Finance and Development in addition continuing to lead the Tax, Treasury, and Risk Management functions.

DiGeronimo has been part of Charter since 2008, first as VP, Product Management. The former Level 3 exec recently added responsibility for Spectrum Reach, Charter's ad sales business, to his current position overseeing Charter's product, engineering, information technology, and business development organizations.

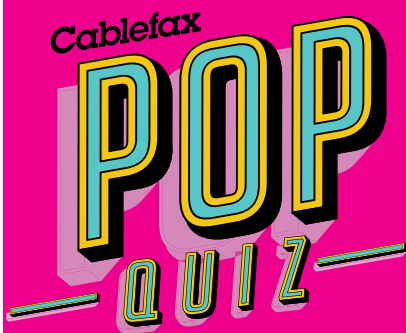
COMCAST OFFICIALLY LAUNCHES XCLASS

The rumors were true: **Comcast** is diving deeper into smart TVs. The operator launched XClass TV Tuesday, a line of smart TVs

that have been integrated with Comcast's X1 entertainment and voice platform. The televisions will be available both inside and outside of Comcast's service areas, and won't require an Xfinity subscription to work. **Hisense** is Comcast's hardware partner on the project. The first XClass TVs are available this week in 43" and 50" 4K Ultra HD models in select **Walmart** stores and will arrive on the retailer's website in the coming weeks. **Peacock Premium** will be included for one year at no additional cost to purchasers of the devices, and other apps including **Netflix**, **HBO Max**, **Hulu** and **Disney+** will be integrated into the TVs. In the months ahead, streaming apps from Comcast and **Charter** will also launch on the XClass TVs.

ALTITUDE CANARY IN RSN COAL MINE

With **Comcast** and **DISH** not carrying Denver Nuggets RSN **Altitude Sports** for more than two years, the market is a bit ahead of the times as MVPDs reckon with the regional sports model. That observation came from **NBA** Commissioner *Adam Silver* in a virtual press conference this week, [reported](#) by *The Denver Post*. "In some ways, Denver has been the canary in the mine because we're seeing now that this issue is popping up in other markets in the country, maybe not in such an extreme way, but you have other teams that are still continuing to be distributed through traditional means but large segments of their fans aren't able to get the games," Silver said. "Coming up with that in-market solution is at the top of our agenda right now." Days before the Nugget's first game of the 2021-22 season, the Post reported that Silver called Altitude's lack of carriage to the majority of Denver cable subs "extremely frustrating" and a "really tough period" as the industry goes through a transition. "We have to be mindful



One winner will be selected each week for a Starbucks gift card

What was the butler's name in "Fresh Prince of Bel-Air"?

CLICK HERE TO ANSWER

Last week's answer: Mork was from the fictional planet of Ork.

Kudos to last week's winner: Paul Schneider, PSPR

of not taking our fans for granted. At some point, if our product becomes unavailable to them, they're going to look for alternative ways to entertain themselves," Silver said.

NETFLIX HIGH ON 'SQUID GAME'

After some light quarters, **Netflix** beat its 3Q21 subscriber growth forecast. The streamer added 4.4 million paid net adds, bringing it to a grand total of 214 million paid subs. Revenue grew 16% YOY to \$7.5 billion while operating income rose 33% to \$1.8 billion. As for the global phenomenon that is "Squid Game," the show has officially become Netflix's biggest ever. Netflix said some 142 million households globally watched the show in its first four weeks, and the show has been ranked as its No 1 program in 94 countries. We have to take Netflix's word for viewership data, a practice that's routinely criticized. The streamer said later this year it will begin reporting hours viewed for its titles rather than the number of accounts that choose to watch them. "There is some difference in rankings... but we think engagement as measured by hours viewed is a slightly better indicator of the overall success of our titles and member satisfaction," the streamer said in a letter to shareholders. Currently, Netflix counts it as a "view" when a subscriber watches at least two minutes of a program. Netflix said it will start releasing title metrics more regularly outside of its earnings report. The streamer also has plans to create consumer products tied to Squid Game, which are on their way to retail now.

SPORTS WINS WEEKLY RATINGS RACE

Postseason baseball helped **TBS** nab the #1 spot in prime among cable networks, with 3.174 million total viewers last week. College football helped **ESPN** to second place (2.61 million), with Saturday's Georgia-Kentucky game netting nearly 6.4 million viewers. All that sports action pushed usual first-place finisher **Fox News** to third (2.307m), which was still a sizeable lead over its news competitors (**MSNBC** took 4th with 1.2m and **CNN** was 10th with 661K). Fox News did win the crown for total day (1.399m), followed by TBS (930K), ESPN (897K) and MSNBC (676K).

VERIZON TO MODIFY 5G AD CLAIMS

The **National Advertising Division** recommended through its complex track process that **Verizon** modify or discontinue claims overstating the benefits of its 5G Ultra Wideband service. Certain claims made on Verizon's social media accounts did not clearly state the differences between Verizon's 5G Nationwide and 5G Ultra Wideband service, and NAD recommended those be discontinued. Other unsupported messages were tied to a commercial about the consumer experience during the Macy's Thanksgiving Day Parade, and insinuated that 5G Ultra Wideband service is widely available. **T-Mobile** raised the challenge. It covered a wide range of issues tied to Verizon's advertising of its 5G offerings, including a static coverage map, claims that its 5G network is the most reliable in America and misleading statements about introductory pricing. NAD determined that certain comparative performance claims for Verizon's 5G wireless service are supported or are non-actionable puffery. Verizon said it is "pleased with the decision and will comply."

FCC WATCHDOG JOINS SOCIAL MEDIA

Suspect fraud in a COVID-19 relief program? You have some new ways to raise the alarm. The **FCC** Office of Inspector General has launched social media accounts on [Twitter](#), [LinkedIn](#) and [Facebook](#). The office has fewer than 50 full-time staffers, but is responsible for oversight and billions of dollars in funds administered through various FCC programs. "We hope to increase the visibility of our office through our social media accounts, with the expectation that individuals or entities with helpful information will come forward to assist us in furthering our mission," said an OIG announcement.

AMC ENABLES MORE ADDRESSABLE

AMC Networks paired up with **The Trade Desk** and **Magnite** to launch programmatic and addressable buying campaigns on linear TV over the summer. The capability created through the partnership allows automated buying that has been traditionally done on digital platforms on linear pay TV. Advertisers that took part in the campaigns included **Best Western** and **Smithfield Foods**, and they have continued leveraging the capability into the fourth quarter as well. The ultimate goal of the efforts by AMC Networks and its partners is to make 100% of its linear reach fully addressable.

CARR WANTS DJI COVERED

FCC commissioner *Brendan Carr* is calling for the addition of Chinese drone company **DJI** to the FCC's Covered List. Adding DJI, which accounts for more than 50% of the U.S. drone market, to the list would prohibit federal Universal Service Fund dollars from being used to purchase its equipment. **Huawei** and **ZTE** are two of the other five companies that have also found their way onto the FCC's Covered List. "DJI drones and the surveillance technology on board these systems are collecting vast amounts of sensitive data—everything from high-resolution images of critical infrastructure to facial recognition technologies and remote sensors that can measure an individual's body temperature and heart rate," Carr said in a statement. "We do not need an airborne version of Huawei."

PROGRAMMING

Disney Junior ordered a second season of animated series "Mickey Mouse Funhouse." The first six episodes of Season 1 will begin streaming on Disney+ on Nov. 10, with new episodes continuing to debut Fridays on Disney Channel and Disney Junior. – **ESPN** reached a multi-year rights deal with the **Central Intercollegiate Athletics Association** that includes both CIIA Men's and Women's Basketball Tournament Championship Games, while all 22 games of both tournaments will be available on an ESPN platform through at least 2024. CIIA is the first and longest running African American athletic conference in the U.S. It features 12 institutions, including Bowie State and Virginia Union University. – **Fuse Media** signed a content deal with **BBC Studios** that will bring more than 60 hours of programming to its Fuse Beat ad-supported streamer. The deal includes the U.S. premiere of British sketch show "Famalam" and Seasons 1-4 of "Luther." – **Tubi** is introducing its first original animated series "The Freak Brothers." Based on the classic comic series, the show's first two episodes will debut Nov 14. -