

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Change Up: Comcast's Mathew to Serve as CEO for Altice USA

Longtime **Comcast** exec *Dennis Mathew* will become CEO of **Altice USA**, effective Oct. 3, while current CEO *Dexter Goei* will move to Executive Chairman of the board at that time.

Given Goei's intention to return to Europe with his family, the board said it, along with Goei, undertook a comprehensive search for a new CEO. Mathew has spent 17 years in senior corporate and operational leadership positions, most recently as Regional SVP for the Comcast Freedom Region. That's one of Comcast's largest regions and most visible since it serves the company's hometown of Philly. He's also served as Regional SVP for the Western New England region as well as VP & GM for Xfinity Home and has management experience focused on technology risk consulting from **PricewaterhouseCoopers** and **Arthur Andersen**.

Mathew takes over an operator that's in the midst of an ambitious fiber-to-the-home upgrade and is exploring the possible sale of its **Suddenlink** assets. He also inherits a company that's trying to reverse a trend of broadband sub losses, with Altice losing HSD subs since 3Q21. "As Altice USA advances its position as a converged fixed and wireless player, I see immense potential to further connect with and serve customers in new ways while elevating the company as the connectivity provider of choice," Mathew said in a statement. "I look forward to leading such an innovative company that has the right vision and long-term strategy centered on investments in fiber infrastructure and a superior customer experience."

Goei has served as CEO of Altice USA since it closed on its 2016 \$17.7 billion deal to purchase Cablevision and combine it with Suddenlink. His tenure included an unsuccessful attempt to buy **Cogeco's Breezeline** (formerly Atlantic Broadband) as well as the launch of a mobile wireless business through an MVNO with Sprint (then **T-Mobile**).

"Leading Altice USA has been the most rewarding experience in my career. From our fiber network deployment and launch of multi-gig fiber broadband offerings to our diversity and inclusion programs and local community engagement efforts, I could not be prouder of what we have accomplished together thanks to the leadership team and the thousands of dedicated employees across the country who enthusiastically serve our customers and communities every day," Goei said. "In the months ahead, my focus will be on ensuring a smooth leadership transition and working closely with Dennis on our key strategic initiatives. I welcome Dennis to the Altice USA family and have the utmost confidence in him as we continue to accelerate and deliver on our fiber strategy and embark on the next chapter of our story."

Altice USA founder *Patrick Drahi*, who will remain a director of the board, praised Goei for effectuating "a business and cultural transformation at Altice USA over the past seven years, building the company into what it is today with passionate employees who are committed to our customers and to each other."

Goei made diversity and inclusion a priority for Altice USA, which

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Cable Center Hall of Fame special issue featuring interviews with the 2022 Honorees

- **PATRICIA JO BOYERS** – President/CEO & Co-Founder, BOYCOM Cablevision, Inc.; Chairman of the Board of Directors, ACA Connects
- **KEVIN CASEY** – President, Northeast Division of Comcast Cable
- **CHRIS LAMMERS** – COO Emeritus and Senior Executive Advisor, CableLabs
- **TINA PERRY** – President, OWN TV Network & OTT Streaming
- **JOHN C. PORTER II** – CEO, Telenet Group Holding
- **MICHAEL K. POWELL** – President & CEO, NCTA-The Internet & Television Association; Former Chairman of the FCC

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Print Issues Distributed at the Hall of Fame Dinner on Sept. 15

has been named a Best Place to Work by The Human Rights Campaign for LGBTQ+ Equality (2021) and the Disability Equality Index (DEI) Best Places to Work for Disability Inclusion (2022). That DEI drive will continue in Mathew, who served as the Executive Advisor for Comcast's Northeast Division's Asian Pacific Americans Employee Resource Group and is the co-founder of Bloom India, a nonprofit organization which is providing high-quality education to over 400 underserved children in India.

CHARTER CFO PREACHES BUNDLE'S VALUE

There's been rumblings for some time now that the great unbundling could lead to the great re-bundling, particularly as streamers look to slash content costs and keep consumers happy even as monthly rates increase (hello **Hulu** rate hike announcement). **Charter** CFO *Jessica Fischer* sang the praises of the video bundle during her appearance Wednesday at **Bank of America's** investor conference. "Being part of the bundle is really powerful in reducing the amount of churn that you have in the video business. And when you have these programmers who are pushing customers into their DTC products, churn hadn't been as large of an issue for them but I think that they're seeing it now and they're seeing the other side of what happens when you're not part of the bundle, which is that those churn impacts are much more difficult to deal with," she said. "[The traditional linear bundle] was a better experience for the customer as well. Nobody wants to be buying and paying for four or five or seven apps a month. A bundled product is actually a better model for both consumers and the content providers themselves. But we are in the space that we are in and so we will see if they get there." It's not a battle between linear and streaming products for **Paramount**, but rather the two can be used together to continue increasing drive to various platforms, Paramount Pictures President/CEO *Brian Robbins* said during a separate appearance at the conference. "We're constantly driving our audience from platform to platform," he said. "Interestingly, like when it comes to kids, linear television has obviously been declining ratings for a while now, but what we've seen is if you take our linear share and the audience for kids that we've picked up on Paramount+, we actually have more audience and share of kids 2-11 than we've had in years when you combine them both." **Disney** CFO *Christine McCarthy*, speaking at the same BoA conference, talked up the upcoming Dec. 8 ad-supported tier of Disney+ as one of the streamer's next growth drivers. She also was big on bundles—just a different kind, one made up of Disney streaming services.

GAME (SHOW NETWORK) OVER ON DISH

After eight months of negotiations to renew a carriage agreement, **Game Show Network** and **DISH** failed to reach a deal,

The WHO and the WHY

CFX's spotlight on recent new hires & promotions



PAUL
Levesque
CHIEF CONTENT OFFICER
WWE

3 THINGS TO KNOW

- WWE has gone through a multitude of changes following the retirement of former Chairman/CEO Vince McMahon, and the promotion of Paul from EVP, Talent Relations continues the ongoing transition. In his new role, he'll manage creative writing, talent relations, live events, talent development and creative services. Paul will report to co-CEO Nick Khan.
- A former professional wrestler, Paul is known in the ring as "Triple H" and made his WWE debut in 1995. His 14 WWE Heavyweight Championships earned him an induction into the WWE Hall of Fame in 2019. Paul is credited for building Next In Line, the company's name, image and likeness program for college athletes, as well as creating WWE's training facility in Orlando.
- In 2014, Paul and his wife Stephanie McMahon founded Connor's Cure, a pediatric cancer research fund made in honor of a young WWE fan who died of cancer. Paul is also a member of the Boys & Girls Club of America Alumni Hall of Fame.

leading the channel to be removed from DISH TV and **Sling** around midnight Tuesday. "We have been working with Game Show Network for months to finalize a fair agreement for our customers," DISH SVP of Programming *Andy LeCuyer* said in a release. "Unfortunately, Game Show Network made the decision to remove its service from DISH and SLING, backpedaling out of a handshake agreement to continue carriage of their service on our platforms. This is a deceitful negotiation tactic aimed at our customers, putting them in the middle." Game Show, which is owned by **Sony Pictures Television**, is encouraging fans to call DISH or go online to voice any displeasure. "Most recently, DISH's removal of channels has been focused on local retransmission or regional sports networks (**Tegna, Sinclair, Block Communications, AT&T Sportsnet, Root Sportsnet, NBC Regional Sports Networks**, among others)," a GSN release stated. "DISH is choosing to do this to Game Show Network, an independent network, that costs virtually nothing compared to local retransmission or sports networks."

AT&T BETTING ON FIBER TO HELP GROWTH

Fiber continues to be a bright spot for **AT&T**, and the company believes it's the best possible technology for sustainable earnings in the long term. The company is at 18 million

homes after having 316,000 fiber adds in 2Q22 thanks to alleviated supply chain issues and increases in connectivity in the U.S. The company goes into markets expecting to achieve more than 40% of penetration within a few years of post-penetration, CFO *Pascal Desroches* said at the **Bank of America** Conference Wednesday. He added AT&T is currently penetrating at twice the rate it has in the past, something he attributes to increasing needs for symmetrical speeds. “I think for years, fiber was a nice-to-have. Now, it is a necessity given the increased number of people working remotely, online learning,” Desroches said. Currently, AT&T’s growth in fiber revenues eclipsed the decline in legacy products and will eventually reach that point in broadband as well. When it comes to fixed wireless access, AT&T thinks it’s useful in certain situations such as for residents in rural areas or those who won’t get fiber for another year or so. Desroches called it a “good catch product” to add customers and eventually transition them to fiber. “Long term, we don’t believe it will be good enough,” he said. “That’s why we think it’s really important to start to place our bets now with fiber because by the time fiber becomes the only acceptable solution, it’ll be too late to start the buildouts because of the long lead times ... the tax on our systems on [the] mobility network for fixed wireless, we think makes it a very expensive solution that is suboptimal.”

WELCOME BACK, VIDGO

The college sports, news and entertainment streaming service **Vidgo** is relaunching with a new look and expanded channel lineup. Customers can choose between three packages: English Premium for \$79.95/month, English Plus for \$59.95/month and Spanish Mas for \$29.95/month. Other new features include 20 hours of cloud DVR storage, dynamic ad insertion, additional college sports and personalized content recommendations. Vidgo is available on devices such as **Apple TV, Amazon Fire TV** and **Roku**. Vidgo is touting itself as the streamer with the most college football. In the first three weeks of September, more than 80% of every televised college football game will be streamed on Vidgo from every conference. It carries **ESPN, ESPN2, Fox Sports 1&2** as well as **Big Ten, Longhorn, Pac-12, ACC Network, SEC Network** and **Stadium**.

HOPPING ALONG

DISH launched its new entertainment system Hopper Plus, which groups live TV, on demand, streaming apps and 2,000 hours of DVR recordings in one place. Built into the DISH home screen and powered by Android TV, Hopper Plus gives users access to Google Play and more than 60,000 free, on-demand titles. Customers can also use the DISH Anywhere app to watch live or recorded shows at any location. The system includes a wireless and wired Joey receiver that enables 4K HDR video capabilities.

DISNEY DEAL

Beginning at 9pm PT, new and returning customers can get a month of **Disney+** at \$1.99. The deal runs until Sept. 19

at 11:59pm PT and highlights Disney+ Day on Sept. 8, which comes with special access to shop Disney merchandise, a six-month free trial to **National Geographic** Digital and more. Customers can access the deal [here](#).

RDK ECLIPSES 100M MARK

The open source software platform that standardizes video, broadband and IoT connected devices **RDK** surpassed 100 million device deployments. The platform had 80 million deployments last year and is currently used across Europe, Asia and Latin and North America. Providers with public deployments include **Atlantic Broadband, Comcast, Cox, Mediacom** and **WOW!**.

RATINGS

It was a big week for **ESPN** as the 2022-23 college football season kicked off and the U.S. Open was underway. The network finished the past week on top in prime among ad-supported cable networks with an average of 2.64 million viewers P2+, followed by **Fox News** with 2.14 million. **MSNBC** came third with 1.4 million, and **ESPN2** cracked the top five at 925,000 and **HGTV** with 880,000. For total day, Fox News reached 35 consecutive weeks in the top spot with 1.42 million. ESPN and MSNBC had 997,000 and 838,000, respectively, while **CNN** increased from last week’s 524,000 number to 529,000. HGTV’s P2+ average viewer count fell from 499,000 to 491,000. – An average of 4.6 million viewers P2+ tuned in to **ESPN** for what was *Serena Williams’* final match of her tennis career, becoming the most-watched tennis telecast in the network’s history. The telecast peaked at 6.9 million viewers in the 10:15pm quarter-hour as Williams fell to *Ajla Tomljanovich* in three sets. Through five days of U.S. Open coverage, ESPN networks are up 101% YOY in average viewers with a mark of 1.1 million, and **ESPN+** has seen 622,000 unique viewers so far—up 65% compared to 2021.

FIBER CONNECT CHANGE OF DATE

Fiber Connect 2023, originally set for June 12-15 of next year, is shifting to Aug. 20-23. The venue for the **Fiber Broadband Association** conference stays the same: the Gaylord Palms Resort & Convention Center in Kissimmee, Florida.

PEOPLE

Canela Media named *Oswald Mendez* as its first CMO, where he’ll oversee all customer-centric strategies and programs that help the company’s growth in Latino audiences in the U.S. and Latin America. The appointment continues Canela’s expansion of roles following a Series A funding round that accumulated \$32 million. – *Andrea Cooper* was promoted to SVP of HR at **Comporium**. Reporting to President/CEO *Bryant Barnes*, Cooper will manage all areas of HR management functions. She’s been with the company since 1999, where she was a Training and Communications Coordinator. – Cable and telecommunications solutions company **Adara Technologies** hired *Michael Shannon* as a Senior Account Executive on its U.S. Sales Team. Shannon was previously a product and marketing executive at Scientific-Atlanta and **Cisco**.

Think about that for a minute...

Rethinking

Commentary by Steve Effros

Welcome back, all of you who have had the luxury of a late-August sojourn! I invite you to look back in your unread emails and check out the last two columns I wrote. They're intended to start folks thinking about the topic for the next few columns on how we got to this point in television, video, broadband distribution of program content and where that whole process may be going. While there seems to be a lot going on, it may be that we're simply "reinventing the wheel"!

The initial two columns pointed out that even the language we use is making it difficult to accurately understand what's going on. "Noncommercial Television" is not "noncommercial" any more. "Free TV" hasn't been "free" since Congress adopted a "retransmission consent" regime for over the air broadcasters when their government-granted (free) use of public spectrum stopped being an exclusive lock on local and national television advertising.

I also noted that the whole notion of "compensation" changed from one where the newly formed national television networks paid local stations to carry the "national feed," to the opposite, where the local station license holders, who are the nominal recipients of those billions of dollars of "retrans" fees that allow local viewers to actually see their local stations, have to pay the network to retain their affiliation.

This same process played out with some cable channels as well. To be sure, when the Weather Channel or CNN or "Superstation WTBS" first came along the cable operators were more than willing to carry them as a bonus and attraction for new customers. The cable guys then started paying for the programming they deliver to subscribers. But that was not always the case. I still have a propane lighter, now reserved for special use, that is emblazoned with the slogan "SIN Pays!" Love it. Translation: the Spanish International Network (SIN) was offering to pay cable operators to carry its programming! That reversal of compensation didn't last long, however. Consumers still don't understand that cable operators pay a whole lot of money to both "cable channels" and local television stations in order to deliver the video to homes.

As an aside, I've long advocated that the industry use the

slogan "We Deliver!" to explain what we're really all about. As broadband and streaming take hold, more and more folks are finally beginning to understand that. The "cord" isn't being "cut" it's just being used in a different way.

But back to the underlying point: we have progressed as an industry from a simple business plan predicated on the notion that public airwaves could be used to deliver information (yes, including local news and "tornado alerts") to local folks and this would be paid for by a restricted cartel having dominion over television advertising, to the situation today where there are almost innumerable video opportunities for consumers and multiple delivery mechanisms for them to choose from. We're not even going to get into the temporary impact videotape and DVDs had on this process, although it was certainly significant!

I can't, however, gloss over the ongoing impact of another "new" technology in the video distribution mix; the DVR. Being able to record video, control when and what you watch, and being able to "fast forward" through the parts you don't want to bother with (for instance advertising) has created a whole new mindset among consumers and distributors about the longevity of an "advertising based" business model.

We see that mindset change going all the way back to television/cable development. It became clear that broadcasters could not survive without a second revenue stream, thus "retransmission consent." Cable couldn't pay the bills with "advertising avails"



on cable channels only, thus, subscription fees. And we haven't even gotten to the confusion over the term "cable." That comes next.

Steve

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(Steve Effros was President of CATA for 23 years and is now an advisor and consultant to the cable industry. His views do not necessarily reflect the views of Cablefax.)

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