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WHAT THE INDUSTRY READS FIRST

Middle Ground: Altice USA Pushing Fiber, Not Mobile, Amid CEO Transition

Altice USA's Dexter Goei isn't fully leaving behind his CEO duties for quite some time. He doesn't plan on returning to Europe until mid-2024, and the next 18 months will see him and incoming CEO *Dennis Mathew* splitting and slowly transitioning the business to a new leadership team.

"We really wanted to give ourselves at least a year for a transition period, so maybe we're four or five months early," Goei said during an appearance at Goldman Sachs Communacopia Conference Tuesday. "I interviewed many, many people during the process and Dennis fits the bill across the board."

The first period of Mathew's tenure will see him focus on the operations side of the business while Goei keeps an eye on external affairs and strategic planning. That will include everything from government affairs to investor relations, and those duties will pass to Mathew after he's become comfortable with the core of Altice's business.

The long-term Comcast leader will be tasked with keeping the fire going behind Altice USA's fiber expansion plans, the start of which has come in "fits and starts" according to Goei. That's in part because of COVID-19 challenges as well as permitting issues, challenges with trained fiber technicians and training. Things are beginning to turn around, and he expects the company to end the year with fiber subscribers nearing the 200,000 mark. The hope is that it will have 600,000 subscribers by the end of 2023.

Additionally, its cost-to-serve numbers for fiber subscribers are down dramatically. ARPU numbers are up 7-8% on gross adds who take fiber versus coax and churn rates are 6-8% lower on fiber. NPS scores are on the rise as well, and a dedication to anticipating supply needs and working with subcontractors has left the broadband provider with little to no pressure on its supply chain. With regulatory clearances and subcontractors in place, the team feels comfortable that it can meet its goal of expanding its fiber footprint to an additional 2-2.5 million homes in 2023 and 2024. At the same time, it is putting its hat in the ring for as many federal and state grant programs as it can reasonably participate in.

"I think we've got about 40,000-45,000 homes that we've won to the tune of about \$50 million in grants. Every week and every month, we're applying for additional grants. I don't want to predict, but I anticipate we should be getting a couple 100,000 more over the next 12-24 months," Goei said.

He doesn't want to paint a picture that would make it seem like there aren't areas where Altice USA could be performing better, however. The company is still experiencing pains on installs, particularly when it is dealing with triple play packages, due to less stable WiFi distribution. He hopes to get those incidence rates down closer to what Altice USA is seeing out of its single-play packages. And while he'd like to put more weight behind **Optimum Mobile** to boost its subscriber base, Goei doesn't believe that now is the right time to promote that product line.

"ARPU's are falling in mobile, promos are rising in mobile and

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usage is rising also, so that doesn't bode well for just gross margins in general when usage is rising and our prices are falling," Goei said. "We're going to spend a lot more time in 2023 with fiber because we're going to start being very active in the marketing of fiber next year given our big footprint, but for the balance of this year, I don't think you should expect real big waves in the mobile product."

WBD COMMITTED TO INDIVIDUAL BRANDS, LINEAR

Warner Bros. Discovery CFO *Gunnar Wiedenfels* doesn't feel any pull to put all of the programmer's eggs in the streaming basket when there is plenty of opportunity left in the linear market. "I find it a weird idea that everything needs to be collapsed into just one platform with one window. We're open to be in business with B2B partners and the consumer wherever they want to be in business with us," Wiedenfels said during an investor conference appearance. "We also obviously have a great competitive position to do just that." Another source of Warner Bros. Discovery's strength is the distinct brands like **HGTV**, **Food Network** and **HBO** that viewers have strong affinities with. Those will be maintained as pillars of the streaming product that will be born from the marriage of **discovery+** and **HBO Max**. "I think there's a lot to be gained from the fact that these are established, very powerful brands in the market and that's going to be a factor in the content discovery approach that we're going to take with the combined product," he added. We're approximately five months post-close of the **WarnerMedia-Discovery** merger and Wiedenfels has no doubt the combined company will meet the financial milestones it promised investors at the time of that deal. His greatest concerns have centered on how to bring these two content machines

together in a way that feels organic, and he believes CEO *David Zaslav* is shepherding them in the right direction. "If I just look at how David's leadership team is gelling, how we're finding people across the combined organization from both legacy company sides that are willing to step up, see the opportunity here, that are excited, get involved in our integration efforts, bring ideas to the table and own certain initiatives... there's a lot of very positive energy," Wiedenfels said. It's a time of highs and lows right now for the newly-joined company. It celebrated a stellar Emmys celebration Monday night, going home with 48 awards company-wide and 38 awards for HBO and **HBO Max** alone. At the same time, Axios [reported](#) Tuesday that hundreds of employees are expected to be laid off in a series of reductions that will kick off this week. Approximately 30% of the combined ad sales team members across WarnerMedia and Discovery reportedly will be cut when all is said and done.

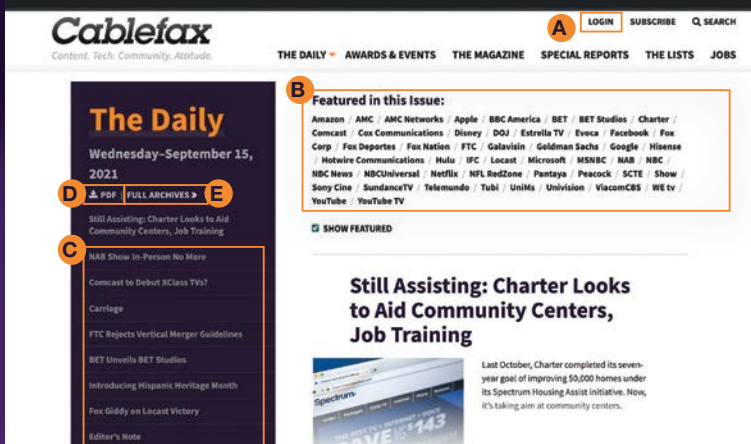
NIelsen MAKES AUDIENCE ENHANCEMENTS

A trio of partnerships is helping **Nielsen** add new audience categories to certain products. The company reached a deal with the healthcare marketing service Swoop to utilize its custom segments, giving healthcare and pharmaceutical advertisers a better look at their audiences. Nielsen also integrated **S&P Global's** Polk Automotive Solutions data in some of its offerings. The audience measurement firm partnered with global ad and marketing tech company Epsilon as well in order to let brands and agencies reach customers in a private manner.

TELEvisaUNIVISION GRABS PANTAYA

TelevisaUnivision completed the acquisition of Spanish-language movies and series streamer **Pantaya** from **Hemisphere**

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Media on Tuesday. News of the transaction originally broke in May as TelevisaUnivision sought to enhance its own services **ViX** and **ViX+**. The deal is comprised of cash and certain Puerto Rican radio assets including WKAQ AM and KQ105 FM.

NAMIC EXPLORING STRATEGIC EXPANSIONS

NAMIC is taking a strategic look at its operations, and it has tapped a minority-owned management consulting firm to take it into the future. It's teaming with **BCT Partners** over the next six months to identify opportunities for NAMIC to build on its brand with existing audiences, find new ones and develop partnerships with more organizations. The insights from the process, which will include reviews of existing materials and the conducting of new interviews, will be used to inform NAMIC's three-to-five-year strategic plan.

LOUISIANA COLLEGE OFFERING FBA PROGRAM

Bossier Parish Community College in Louisiana is signing on to offer the **Fiber Broadband Association's** Optical Telecom Installer Certification Path program. The first course will begin this fall, and the state's **ConnectLA Office of Broadband Development and Connectivity** played a major role in connecting the school with the association. The hope is that the program will help bolster the state's broadband labor force with new fiber technicians and will help Louisiana reach its goal of closing its digital divide by 2029.

TNF PRIMETIME EVENTS AND DEALS

Prime Video's first Thursday Night Football broadcast is Thursday and to celebrate, over 250 Prime members who added TNF to their Prime Video watchlist will join former Super Bowl champion *Jerry Rice* and others at The Fonda Theatre in L.A. for a kickoff event. Throughout the season, more than 150 members who added a specific TNF game to their watchlist will get a boosted experience. Recipients will receive a package containing game tickets, a personal message from a player, hotel room, goodie bags and more, with transportation to and from games supplied as well. Prime members can find officially licensed NFL products and apparel on amazon.com/TNFcentral, which will feature exclusive deals throughout the season. Customers can also save up to 25% on select NFL gear starting Thursday and up to 20% on certain T-shirts and hoodies beginning Sept. 22. **Amazon** is also offering 25% off of an Echo Studio and two Echo smart speakers from Sept. 19-23.

FIBER FRENZY

AT&T is building its fiber network to over 5,000 locations in Martinsville, Indiana. The \$6.3 million project—which is dependent on a final contract between AT&T and the city—is expected to finish construction within 12 months of that final agreement. Once done, it will supply residents and businesses with speeds of up to 5 Gbps.

ESPN'S BIG NUMBERS

ESPN made it two weeks in a row as the top cable network in prime. With college football well underway and the **NFL** kicking off, the sports network averaged 2.68 million viewers P2+ in prime. ESPN's "College GameDay" received an average of 2.1 million viewers for its Week 2 show—up 19% from last season's Week 2 ep. The Kentucky vs. Florida contest averaged 4.3 million viewers, the best Saturday game in September on the network

since 2018. Tennessee-Pitt reeled in 4.5 million viewers, good for the second-most viewed game of the week across all networks. Additionally, Friday night's showdown between Louisville and Central Florida on ESPN2 was the most-viewed Friday game since 2013. ESPN also is feeling pretty good about tennis. This year's U.S. Open averaged 1.21 million viewers across the tournament's two-week run, a 50% increase YOY. The semifinal match between *Frances Tiafoe* and *Carlos Alcaraz* averaged 2.96 million viewers and peaked at 3.6 million, up 66% from the equivalent broadcast in 2021 and is the network's ninth largest audience on record. As for last week's ratings pyramid, **Fox News** was the only other network to breach the 2 million mark with 2.02 million in prime, followed by **MSNBC** with 1.02 million, **HGTV** with 877,000 and **Hallmark Channel** at 800,000.

ORGS REQUEST TELEHEALTH WAIVER EXTENSION

More than 375 healthcare and technology organizations including **Amazon**, the **Consumer Technology Association** and **Google** sent a letter to Senators *Chuck Schumer* (D-NY) and *Mitch McConnell* (R-KY) asking them to extend the flexibilities around telehealth granted during the COVID-19 pandemic into the future. At the end of the public health emergency, a clock began to tick on a 151-day statutory extension of telehealth waivers. While helpful, this temporary remedy has healthcare providers nervous about long-term support for virtual medical services. The groups have formally asked the Senate to consider passing a two-year extension of flexible telehealth policies while continuing to push for a permanent extension that would lift provider and patient location limitations, ensure patients can access medications without in-person requirements and encourage increased access to telehealth services in the commercial market.

BILL O'REILLY COMES TO VIDGO

Bill O'Reilly is coming to **Vidgo** in the streaming platform's first exclusive and original series. "Shock and Awe" premiered Friday and has an initial 40-episode commitment. The opening episode discussed the physical toll of football in honor of the **NFL's** opening weekend, and the upcoming program will focus on President *Biden's* time in office. O'Reilly hosted "The O'Reilly Factor" on **Fox News** for 16 years, but in 2017 he was ousted from the network after a *New York Times* article revealed the network and parent company 21st Century Fox [reached settlements with five women](#) who accused O'Reilly of misconduct.

PEOPLE

Former **Disney** CEO *Bob Iger* is joining **Thrive Capital**, the venture capital firm led by *Josh Kuchner*, as a partner. Iger spent 15 years as head of Disney, where he oversaw the purchases of **Lucasfilm**, **Marvel Entertainment** and more, as well as the launches of **ESPN+** and **Disney+**. – **Paramount Global** named longtime sales vet *Jo Ann Ross* as Chairman, Paramount Advertising, with *John Halley*, previously EVP/COO of Advertising, to succeed her as President, Paramount Advertising. Ross joined **CBS** in 1992 as VP of Olympic Sales before eventually becoming the first female sales chief of a broadcast network. Halley, who joined **Viacom** in 2007, will manage the company's domestic multiplatform sales across broadcast, cable, digital and streaming assets.