

# Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

## New Look: Altice USA CEO Talks Fresh Hires, 2024 Improvements

If you feel like there are a lot of new faces leading the way at **Altice USA**, you're not wrong. There have been new additions across several departments and shifts in structure since CEO *Dennis Mathew* took over the company in October 2022, and he said during the UBS Global Media and Communications Conference Monday that Altice USA is 70-75% of the way through in terms of bringing in the right new people to the company and getting them into the right seats. "I'm very excited that everyone is coming in knowing what great looks like, and that's the key to being able to come in and work as a team," he said. "There's no silver bullet. There's probably 10,000 small actions that need to happen, and we are working together as a team to maniacally prioritize disciplined execution."

**Comcast** and **T-Mobile** have been noticeably trying to take customers in **Altice USA's** footprint, particularly in the B2B space, and **AT&T** has started increasing their marketing in places like Texas. But Altice USA is ready to be on the offensive, and Mathew said it will be using a lot more science and a lot less art to the crafting of its strategies moving forward. When he joined the provider, he said there really wasn't a major strategy in place around managing the subscriber base and there certainly wasn't one around retail and sales channels. Now, he's ready to compete with, to name a few things, stronger sales channel performance and a meaningful marketing push.

"When I joined, the ARPU erosion was really at an all-time

high. We were bleeding ARPU in our care channels and our retention channels, and we unfortunately did not provide our teammates with the right tools to be able to have those conversations," he said. "As we go into 2024, we're launching new tools and new capabilities that will really allow our teammates to be able to have the right conversation... we're able to have a robust conversation tied to price, tied to speeds, tied to value and rightsizing from a packaging perspective."

While he believes Altice USA now has vastly more tools and capabilities to be able to develop and drive a more effective go-to-market strategy, Mathew admits that it is still the early innings in terms of the provider having the infrastructure in place to right the ship.

"Many of the leaders that have joined come from a level of operational rigor. It's a daily grind every day, maybe every minute of the day. I visited some of my team... at 7:30, we're talking about the installs that are coming up. At 8, we're talking about the customers that are having challenges and at 9, we're talking about the new build activity," he said. "That's the level of rigor that we're putting in place that just didn't exist prior."

Another area that was lacking was the thought around how to sell mobile without outrageous customer promotions, and Mathew said the provider has been able to double mobile attachments since the launch of Optimum Complete. There's also been the development of stories around the annual savings customers can achieve when they take on Optimum's broadband and mobile products when compared to those



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“This is a great conversation for us to have and we’re finding that it’s absolutely resonating with our existing base, but it’s also resonating from a go-to-market perspective,” Mathew said. “It’s also very helpful when you think about some of our West markets where we’re competing against the fiber overbuilders who don’t have solutions like mobile and video in their portfolio.”

On the video front, Altice USA is moving into the self-install game for the first time. It is in the process of introducing a streaming Android-based video set-top box. It will be available in Altice USA’s retail stores and the streaming app will be available on other OTT streaming boxes as well. And while the provider is still wholly committed to offering a traditional video option, Mathew acknowledged that entering streaming means that his company will have a whole host of options for how it provides video in the future. “But we are, again, in the early innings of looking at those types of solutions,” he said.”

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## FOX CONFIDENT KEEPING SPORTS IN MVPD BUNDLES

**Fox Corp.** CFO *Steve Tomsic* is sure that when **ESPN** makes its transition into a direct-to-consumer service, it will be a fantastic product. But even at its best, it will only be able to capture a sliver of the overall sports marketplace. “If you’re a true sports fan, if you want to watch the **NFL** in a given week, you’ve got **Amazon** on Thursday, you’ve got us Sunday, **CBS** Sunday, **NBC** on Sunday night and you’ve got **ESPN** Monday. And the NFL is the most important sport in the country,” he said during an investor conference appearance Monday. “If you’ve got that level of fragmentation, no one sports services is going to satisfy you. And then you look at if you’re a sports fan across multiple sports, you haven’t got a hope.” With that, Fox still believes that MVPDs and vMVPDs are the best way to access a collective of sports and that distribution method will continue to hold the crown for some time. “If you conjure a way to bring all those sports services together, bringing together content from a lot of players, that kind of looks like a digital MVPD, right? It’s probably going to be at a similar price point,” he said. “We’ve got all the building blocks for us to go there to see if and when that becomes appropriate. But for now, we still think that the right strategy is where we’re at.”

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## VERIZON PACKAGING NETFLIX, MAX AD TIERS FOR \$10

**Warner Bros. Discovery** CEO *David Zaslav* has been a major advocate for looking at how to easily bundle together streaming services for consumers. **Verizon** is stepping in to do just that,

announcing partnerships with **Netflix** and **Max** to make both services available to the wireless company’s customers at a discounted rate. Starting Thursday, Verizon’s myPlan mobile customers will be able to purchase subscriptions to the ad-supported tiers of Netflix and Max together for \$10/month. The bundle will be among ten \$10 monthly perks available to myPlan customers, with other options including **Apple TV+** and **Walmart+**.

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## COMCAST HAS RECEIVED HULU CHECK FROM DISNEY

**Comcast** has collected its check from **Disney** for its 33% stake in **Hulu**. Company President *Mike Cavanagh* announced the news during an investor conference appearance Monday. Disney agreed to acquire the stake for approximately \$8.61 billion, but there is still an appraisal process that must be done to assess Hulu’s equity fair value as of Sept. 30. If the value of the company is ultimately determined to be greater than that guaranteed floor value, Disney will need to pay its percentage of the difference. Cavanagh certainly hopes and expects to have another check to place into Comcast’s accounts once all is said and done. While he’s excited to push forward and develop **Peacock** into one of the world’s premier streaming services, he also wants observers to remember that it is built on the shoulders of legacy businesses that still have plenty of life. “I think there’s so much power in the legacy businesses that even though the linear business model is changing based upon how consumers want to consume, it is the platform to build a future that includes a digital element as consumers change,” Cavanagh said. “We still have very significant distribution, as much as anybody, in the traditional linear world. Nothing’s going to change the gravity that that side of the business is feeling, but the infrastructure that we have as we bring it to life in the form of Peacock is a great way to think about the game we’re trying to play.”

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## STILL NO DEAL FOR DIRECTV-TEGNA

**DirecTV** and **TEGNA** didn’t reach a truce over the weekend, despite games such as Saturday’s SEC Championship on **CBS**. DirecTV is offering customers a one-time credit of \$10 at its DirecTV.com/tvpromise website. The blackout began Thursday evening and involves 64 TEGNA stations in 51 markets.

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## NAB CHALLENGES ATVA LOW-POWER LOOPHOLE CLAIMS

**NAB** is taking issue with retrans reform group **American TV Alliance’s** [ATVA] list identifying 121 alleged instances of duopolies, triopolies, or quadropolies formed by using the multicast or low-

power loophole. ATVA argued in broadcast ownership comments at the **FCC** this year that broadcasters are exploiting a loophole in the rule prohibiting ownership of top-four broadcast stations in a DMA by using multicast streams and low power stations to broadcast a second—or even a third, or fourth—top-four affiliation. In an ex parte filing from a meeting last week with *David Strickland*, FCC Chairwoman *Jessica Rosenworcel*'s legal advisor for media, NAB said that nine of the alleged loophole instances are actually lawfully formed duopolies involving only full power commercial television stations that have nothing to do with content aired on multicast streams or LPTV stations. Those nine are in Clarksburg-Weston, WV; El Paso, TX; Fresno-Visalia, CA (#44); Grand Rapids-Kalamazoo-Battle Creek, MI; Indianapolis, IN; Jacksonville, FL; Norfolk, VA; Raleigh-Durham, NC; and San Antonio, TX. NAB said dozens of the instances on ATVA's list are in markets with fewer than four full power commercial television stations, including 12 instances in markets with a single full power commercial television station. "ATVA's careless at best identification of these full power duopolies as 'using multicast or low-power stations' borders on misrepresentation. Five more 'instances' also involve ownership of more than one full power station affiliated with one of the four major broadcast networks, and, although some of the stations are listed on ATVA's chart as multicasting a second network, it is the same network as one of the primary affiliations in the combination (i.e., Station 1 airs CBS on its primary signal and NBC on a secondary stream, and commonly owned Station 2 airs NBC on its primary stream and CBS on a secondary stream)," NAB wrote. "Another alleged instance of a multicast/LPTV 'duopoly' is the airing of Big Four network content on two separately owned full power stations involved in a local marketing agreement in Erie, PA. These 15 entries on ATVA's list are not 'instances' of anything except full power combinations that were lawfully formed (and one pair of separately owned stations) and do not show that multicast or LPTV affiliations are allowing broadcasters to use any 'loopholes.'"

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## NCTA BOARD CHANGES

**Fox News Media** CEO *Suzanne Scott* and **CommScope** President/CEO *Chuck Treadway* have joined **NCTA's** board. Treadway replaces CommScope's *Frank Drendel* who has retired and stepped down from the board after serving for more than three decades. With *Tom Rutledge* retiring as Executive Chairman of **Charter**, he's stepped down as NCTA's board Vice Chairman. Charter President and CEO *Chris Winfrey* is the company's new Corporate System Director on the board. **Cox Communications** President *Mark Greatrex* will assume the role of Vice Chairman, and **Comcast Cable** President/CEO *Dave Watson* will assume the role of Treasurer.

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## COX, DIRECTV GET AN BRAVO EXPERIENCE

**Cox** and **DirecTV** subscribers have access to an immersive augmented reality experience featuring **Bravo's** late night talk

show "Watch What Happens Live with Andy Cohen." Viewers can access the experience via their mobile or desktop device through a unique QR code on their respective partner platforms from now until Dec. 20. As fans "walk" through the Clubhouse, they may test their knowledge by clicking on featured objects to interact with, answer trivia and more. Fans can also enter to win tix to a taping of the show. The experience relies on XR developer studio and creative agency Trigger XR.

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## ON THE CIRCUIT

"Barbie" makes its debut on **Max** Dec 15, with **Warner Bros. Discovery** and Max to make the experience more inclusive by having it interpreted in American Sign Language. To celebrate "Barbie with ASL" coming to the platform, Max will host a special community screening on Dec. 14 in L.A., where Barbie star *Margot Robbie* will join the ASL version's producer *Leila Hanaumi* for a post-screening conversation. The event will be in collaboration with non-profit, Deaf West Theatre, a celebrated Deaf institution in L.A. for over 30 years, and RespectAbility.

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## PROGRAMMING

Viewers can get a behind-the-scenes look of the upcoming film "The Color Purple" in Friday's **OWN** Spotlight installment, "OWN Celebrates The New Color Purple" (10pm premiere). The one-hour special features *Oprah Winfrey* interview the movie's stars and more. Winfrey, who serves as a producer of the film, also reflects on her role as Sofia in the 1985 film version of the *Alice Walker* novel. – **Spectrum News NY1** and **Spectrum News NY1 Noticias** are collaborating on two hour-long specials examining the roots of New York City's ongoing migrant crisis and its impacts, one airing in English and one in Spanish. The complementary primetime specials, "Crossing Borders: Inside the Migrant Crisis," airing on NY1, and "Desafio Migratorio," airing on Noticias, debut Thursday at 8pm ET. – **HGTV** greenlit for new series for 2024: "Battle on the Mountain," a competition series featuring upgrades to mountainside properties, "Farmhouse Fixer: Camp Revamp," featuring New Kids on the Block member *Jonathan Knight* tackling his latest renovation project; "Divided by Design," where married interior designers compete against each other for clients in Miami, and "Lakefront Empire," following real estate agents as they work to sell a wide range of homes in the Lake of the Ozarks near St. Louis, Missouri.

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## PEOPLE

**NAB** named *Ray Quiñones* as Director of Government Relations. Quiñones joins NAB from the congressional office of Rep. *Darren Soto* (D-FL), who serves on the House Energy and Commerce Committee. – *Daniel Callahan* has joined **Spectrum Reach** as Group Vice President, National Sales. He is a 16-year veteran in the media, marketing and ad sales industry, and most recently was SVP of Strategy and Sales Innovation for **Fox Corp.** Ad Sales.