

# Cablefax Daily™

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What the Industry Reads First

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## Wireless Entry: Altice USA Takes Different Approach

Once again, **Altice USA** has veered from its cable brethren, taking a very different approach to mobile with its MVNO through **Sprint**. Most notable is the price tag—\$20/month per line with “price for life” commitments for unlimited text & data over 4G LTE, compared to **Comcast’s** and **Charter’s** \$45/month per line unlimited offering through their MVNO deals with **Verizon**. “We wouldn’t be going into this business if we didn’t think it could be a standalone, profitable business and we’ve guided the market that within 12 months, we should reach profitability,” Altice CEO *Dexter Goei* told reporters Thursday. “We’ll have some light losses in the first year as we launch, which is really driven by launch costs and marketing dollars. But we’re not pricing this offer at all at a negative gross profit.” Xfinity Mobile lost \$88mln for Comcast in 2Q19 and isn’t expected to turn a profit in the near future. Charter, which launched its mobile service after Comcast, is in a similar boat, reporting an adjusted EBITDA loss for Spectrum Mobile of \$119mln in 2Q. Differences between the cable wireless approaches don’t end with the costs, however. Comcast and Charter’s services are available only to customers who also take internet through them. Non-Altice customers living in or near its 21-state footprint (including NYC) can get the service for \$30/month per line. And any Optimum and Suddenlink customer, not just internet subs, are eligible for the \$20 price tag. Another distinction is that, at least for now, Altice’s mobile offering is not integrated in any way with the Altice One gateway or other services. Comcast made Xfinity Mobile a digital-centric product from the start and has been looking for ways to integrate it with xFi and other offerings. A current integration example includes Comcast’s “Phone Finder” service, where customers can use their Xfinity voice remotes to search for their mobile phones. Altice is quick to note that it has a full MVNO vs the partial MVNO’s Charter and Comcast have. The Sprint pact allows Altice to own the SIM cards in customers phones. It also has a separate roaming agreement with **AT&T**. The result is customers phones will switch between Sprint and AT&T radio access networks depending on location and quality of service. Altice also has deployed 19K small cells to improve Sprint’s service offering. Some analysts think Charter and Comcast should consider kicking the tires on the Altice model and lock up an MVNO with T-Mobile now while its acquisition of Sprint is uncertain. “They can probably get a deal with Sprint quite easily, but if Sprint is acquired they will need a deal with T-Mobile. Now is the time to get it,” **New Street Research** analyst *Jonathan Chaplin*

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told **Cablefax**. Under the **DOJ's** approved T-Mobile/Sprint settlement, Altice's MNVO agreement with Sprint will be expanded to the New T-Mobile network, inclusive of 5G services. In a note New Street published Thursday, the firm said a similar lower cost structure for Comcast and Charter could give them opportunity to be more disruptive in wireless, "which will matter a lot more to the wireless industry today given that they collectively cover 75% of the country." New Street predicts Altice's mobile launch will drive market share gains or the company, but shouldn't be too troublesome to national wireless players given that the MSO covers only about 5% of the country. For the record, T-Mobile CEO *John Legere* and his very active **Twitter** account were mum on Altice's launch Thursday. Less than 24 hours before Altice's announcement, he had taken one of his characteristic **jabs** at Verizon, AT&T, Charter and Comcast.

**Altice Mobile—What's in A Name:** Take note that **Altice USA** didn't choose to call its mobile service **Optimum Mobile** or **Suddenlink Mobile**. There's no word of a rebrand at this point, but it's something we're keeping tabs on given the continued use of the Altice name. Last month, the operator debuted a smart speaker dubbed "Altice Amplify." Altice Mobile joins a portfolio that also includes the Altice One gateway. Over the summer, Altice co-pres & COO *Hakim Boubazine* told **Cablefax** the company is reaching that "critical mass" where it could make a lot of sense to change brands or use Altice as a halo brand that people will aspire to.

**AT&T Has Another Retrans Blackout:** Summer may be over, but **AT&T's** retrans woes aren't. **DirectTV** lost six **Cowles Montana Media** stations late Wednesday (four of the losses also impact AT&T TV). Cowles said the retrans agreement expired on June 30 and reminded viewers of alternative distribution options. AT&T said the broadcaster is seeking a substantial fee increase, while Cowles said the impasse is "about much more than just money." The impacted stations are **KULR** (NBC-Billings), **KWYB** (ABC/Fox/My Network TV-Butte-Bozeman), **KFBB** (ABC/Fox/My Network TV-Great Falls), **KTMF** (ABC/Fox/My Network TV-Missoula), **KHQ** (Spokane, WA-NBC) and **KNDO** (Yakima-Pasco-Richland, WA-NBC).

**The Gaines Tap Leaders:** *Chip and Joanna Gaines'* jv with **Discovery** announced its first wave of senior leadership. *Donna MacLetchie* will serve as gm, programming, managing teams in Knoxville, New York and Texas. She comes over from **Jane Street Entertainment**, the production company she co-founded in 2011. *Julie Morris* has been named svp, brand strategy and operations, leading teams in Knoxville and NYC. She's been with the company since 2003, most recently as vp, brand research and strategy for **HGTV**, **Food Network** and **Travel Channel**. *John Marsicano* will serve as head of PR for the new net, joining Discovery from the Gaines' team in Magnolia. He will continue to manage the couple's representation directly.

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**Nexstar to Pay \$100K for KidVid Violations:** The **FCC** has concluded that two **Nexstar** stations have failed to meet their KidVid requirements, hitting the broadcaster with a \$109K fine. The Commission had been investigating whether **KARK-TV** (Little Rock) and **KFDX-TV** (Wichita) were meeting requirements that included providing quarterly reports to the agency detailing efforts made to provide programming for children. The FCC said because the consent decree contains appropriate terms and conditions, it does not need to determine whether or not Nexstar seriously violated any regulations. The agency determined Nexstar's qualified to remain a Commission licensee. The broadcaster has also agreed to put compliance plans in place to avoid the situation occurring a second time.

**Storm Watch:** Hurricane Dorian is expected to move toward the coasts of SC and NC Thursday night and Friday. **WOW!** said Thursday afternoon that it's aware of some service outages, but not able to fully access network infrastructure because conditions are not safe. **WOW!**'s Charleston, SC, offices are closed and it is encouraging employees to abide by mandatory evacuations. Like many other operators, it's providing updates on social media. The **FCC**'s Dorian status report Thursday showed more than 53K cable and wireline outages in SC. Low-power TV station **WHDC** was reported as out of service Thursday morning.

**More Spectrum Auction Talk Coming at FCC:** Continued support for Puerto Rico and procedures for auctioning off the 3.5GHz band will both be considered during the **FCC**'s Sept 26 open meeting. The Commission is proposing to conduct Auction 105, which would free up spectrum to promote 5G, as an ascending clock auction which would see bidders demand generic license blocks in specific counties. There would be no assignment phase in this proceeding, setting it apart from Auctions 102 and 103. The current proposal would also incorporate an activity upper limit that would allow bidders to submit bids exceeding their current eligibility in an attempt to mitigate the possibility that a bidder would be barred from participating in the auction. Small businesses would have a bidding credit cap of \$25mln while rural service providers would see one of \$10mln.

**What's Coming Next at Netflix:** **Netflix** has added a new feature that's designed to alert subscribers of what's new to the service. The Latest tab breaks titles down into three categories: new this week, coming this week and coming next week. Subscribers are also now able to click a "Remind Me" button on specific upcoming titles to receive a notification of when they drop. Netflix began rolling out the feature in August and will continue bringing it to eligible devices in the next few weeks. Smart TV owners will need to wait a little longer for the feature with Netflix saying it will arrive in the coming months.

**Altice USA Vet Heads to Northland:** **Altice USA** alumnus *Andy Parrott* has joined **Northland Communications** as COO. Reporting in to Northland pres/CEO *Phil Spencer*, Parrott will oversee the operator's day-to-day operations across field services, engineering, customer care, IT and more. He will also work to integrate the recently acquired **Eagle Communications** and pending **Vyve Broadband** assets. Parrott most recently served as svp, operations at Altice and previously spent 14 years at **Suddenlink** where he acted as corporate vp, technical operations.

**Fox Nation Joins Xfinity:** Streaming service **Fox Nation** is now available on **Comcast**'s Xfinity platforms, including TV, on demand and for internet-only customers on Xfinity Flex. The streamer has more than 600 hours of content designed to complement FNC. The streamer first launched in November, and retails \$5.99/month or \$64.99/year.

**Obituary:** Sad to learn PR/marketing great *Arthur Sando* passed away suddenly Tuesday from a heart attack. He is credited with founding and building the PR department at **Turner** and later went on to manage PR at **King World Productions** and served as svp, communications for **CBS Enterprises**. He also did stints at **Winstar Communications** and **Comsat**. Sando was inducted last year as a **Cable TV Pioneer** and is a past recipient of the **NCTA** President's Award. Former **CTAM** pres/CEO *Char Beales* worked with Sando for nearly 40 years. She remembers him as a friend to many and a close confidante to legends, including *Ted Turner, Michael* and *Roger King, Larry Flynt* and *Joe Torre*, while remaining behind the scenes.

**People:** **BET** appointed *Jeanine Liburd* as chief social impact and communications officer. Based in NYC and reporting to pres *Scott Mills*, Liburd will lead multiplatform social change initiatives meant to empower the network's audiences. Liburd will continue to lead **BET**'s communications, corporate social responsibility and event production teams. She most recently served as chief marketing and communications officer for the net, but has been a part of the **Viacom** family since 2000. -- Prepaid satellite service **Orby TV**, led by ex-**Starz** exec *Michael Thornton*, revealed more of its [senior management team](#). Thornton's former Disney colleague *Tres Izzard* is COO, and his former **DirectTV** colleague *Carl Crabill* is chief revenue officer.



# PROGRAMMER'S PAGE

## Rebuilding America's House

We all know the early '70s tune of a lovely lady and a man named Brady. Now 50 years later, we can get that Brady family fix we've been looking for with the **HGTV** limited series "A Very Brady Renovation." Eight stars from HGTV shows, including "Property Brothers" and "Good Bones," are teaming up with the original cast to rebuild the iconic Brady house, complete with the infamous staircase, Jack and Jill bathroom, and even Greg's attic. Getting the original cast together wasn't easy. They had plenty going on since the sitcom ended in 1974. "Getting all six schedules to line up was one of the biggest challenges, but also one of the most important parts of the show," said svp, production and development *Loren Ruch*. From rewriting "The Brady Bunch" theme song to showing clips from the show as a reminder of how great it was, "A Very Brady Renovation" can't miss a beat, especially with the original cast watching over every aspect. HGTV ran into plenty of obstacles, but nothing was going to stand in the way of the renovation, including making 83 phone calls just to find a dining room set. "Gathering all the accessories of the house was tough, but we crowdsourced and even used skills of the cast to help remake the items we couldn't find," said Ruch. "I was surprised at how willing viewers were to give us their items for the remodel." The series includes a full-scale overhaul of the real Brady Bunch house seen on TV in LA. HGTV is also adding 2,000 square feet to its original footprint—without compromising the street view—to add all the rooms on the show. The five-ep special premieres Sept 9 at 9pm. Sister net **Food Network** is getting in on the fun, with shows such as "Worst Cooks in America," "Chopped" and "The Pioneer Woman" featuring Brady-themed episodes throughout August and September to promote all things Brady. — *Nikki McVicker*

**Reviews:** "Mr. Mercedes," Season 3 premiere, 10pm, Tuesday, **AT&T Audience**. *David E. Kelley* and *Jack Bender's* fine adaptation of *Stephen King's* Bill Hodges trilogy continues, and not a moment too soon. While this series largely has flown under the radar, its first seasons were some of the best TV renderings of King's writing we've seen. While last season's storyline hovered between books one and two, this entry begins squarely with the gripping scene that opens book three. What happens during that opening act sets up much of the rest of the season. Playing a famous, but reclusive mystery novelist, *Bruce Dern* makes a special appearance in that segment (nobody plays a cranky, crazy old man as well as Dern). Speaking of domination, that's one way to describe *Brendan Gleeson's* performance as the rough-around-the-edges-but-endearing Hodges, a retired detective who's anything but retiring. Viewers of **HBO's** "Succession" will barely recognize *Justine Lupe* here as Holly Gibney, Hodges' business partner/part-time nanny. Haven't seen the first seasons? Not to worry. You'll feel at home in Season 3 quickly. -- "Out of Omaha," 9pm, Monday, **Starz**. Oh, the irony. The final season of Starz' hit "Power" seems fantastical. On the other hand, this excellent doc from *Clay Tweel*, about ghetto life in Omaha (yes, Omaha, with America's largest concentration of millionaires), is gritty, realistic and compelling. — *Seth Arenstein*

Basic Cable P2+ Prime Rankings* (08/26/19-09/01/19)		
Mon-Sun	MC US	MC US AA
	AA%	(000)
FNC	0.744	2,288
MSNBC	0.509	1,565
ESPN	0.413	1,268
HGTV	0.393	1,209
USA	0.382	1,172
HALL	0.335	1,030
TLC	0.323	993
HIST	0.294	904
ID	0.294	904
CNN	0.292	897
TBSC	0.284	872
A&E	0.252	775
DISC	0.247	760
FOOD	0.243	746
TWC	0.237	728
ESPN2	0.215	660
ADSM	0.211	649
MTV	0.192	590
INSP	0.192	589
NICK	0.191	586
BRAVO	0.188	577
TNT	0.180	554
NAN	0.177	544
SYFY	0.165	507
LIFE	0.162	498
PARA	0.162	496
FX	0.160	491
APL	0.157	484
TVLAND	0.157	482
DSNY	0.147	452
VH1	0.144	443
AMC	0.144	442
NBCSN	0.142	438
WETV	0.141	435
FRFM	0.140	432
CRN	0.123	378
DSJR	0.123	377
GSN	0.123	377
TRAVEL	0.122	374
HMM	0.121	372
NKJR	0.117	361

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

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