

# Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

## Identity Shift: DirecTV Wants to Be Viewed as a Streaming Company

Video distributors have been forced to adapt to a declining subscriber base, and for **DirecTV**, that evolution involves getting consumers to view it as a different company than it was 5-10 years ago. However, it gets tricky when that applies to customers who've been with the company long before streaming invaded the TV ecosystem.

DirecTV CMO *Vince Torres* said that it sees the same problems that others in the media space have felt, primarily involving fragmentation and the increasing cost of content. How the MVPD plans on standing out in that fragmented space includes changing the way folks inherently view the company.

"Our biggest challenge now with breaking through the noise is telling everybody we're a streaming business. That's our focus. We've invested \$400 million over the last few years to put forth a solution that we believe hits on what customers are asking for, but we're right smack in the middle of this streaming industry, and consumers need to know that," Torres said during a fireside chat at **StreamTV Show**.

Torres then noted how it's focused on driving home the message that customers can stream DirecTV without the need for a satellite. "Those words are very intentional. It's not to take away from the value consumers get [with] those that love their satellites with us, and we love them as customers, but there's broader options available for customers if that doesn't suit their needs," he said. DirecTV will continue to push mass-market mes-

saging to spotlight its streaming options, with Torres describing it as a "sustained, long-term education campaign."

Linear is still a key piece of the puzzle in DirecTV's video strategy. To meet the shift in consumer priorities, it's had to pivot to focusing on affordability, flexibility and integrating new solutions. That's seen through continued enhancements to DirecTV's Gemini device, the introduction of **MyFree DirecTV** and the litany of Genre Packs that've been introduced to offer more, skinnier subscription options.

The prospect of fragmentation, in addition to increased pricing among streaming products, has led to consumer fatigue and thus less willingness to pay for several subscriptions. DirecTV's funnel of free, to genre-specific content to a premium pay TV package allows it to tap into different groups who range in affordability.

"We still offer the top-end solutions, our signature packages. Those have been there for some time, and they offer the best of everything, but not everybody can afford that," Torres said. "So we acknowledge that, and we provide a solution that allows customers to come and go."

Torres believes we're in the Golden Age of content because of how much is available for people to consume, but discovering it remains an issue that the industry could pay more attention to. His solution calls for more industry collaboration to help make it easier to search for content, and a subsequent benefit could be easing the pain points associated with fragmentation.

"I think, as an industry, there is more work that we can do to really put the customer at the middle and find paths to solve

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this challenge of content rage,” he said. “We still have business priorities that we all have to solve, but by working together, I think putting the customer more in control and not force-feeding them things that are part of the legacy bundles or legacy approaches, but giving them the control, is going to win the day.”

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## TRUSTY THE PROCESS

It looks like the **FCC** may have a quorum for its June 26 open meeting after all, with Senate Majority Leader *John Thune* filing for cloture Thursday evening for FCC nominee *Olivia Trusty*. That clears the way for the Senate to issue a final vote on her nomination without debate. Trusty’s nomination to fill the remainder of *Jessica Rosenworcel*’s term (which expires June 30) and a full five-year term that would start July 1 are on the Senate’s Executive Calendar for Monday, June 16. The calendar is a list of items awaiting Senate floor consideration. There had been suggestions that the Senate would wait to confirm Trusty in July when the full term would start, but *Nathan Simington*’s sudden exit last week left the agency without a GOP majority or a quorum of three commissioners. The FCC’s June tentative open meeting agenda includes an item that would remove 77 rules and requirements around cable rate regulation that the agency says are obsolete.

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## SIX QUESTIONS WALL STREET HAS ABOUT STREAMING

Numbers matter more than words, but even Wall Street has been wrangled into figuring out the streaming landscape. It gets even trickier when you incorporate the increasing popularity of CTV products. **Needham & Company** Senior Internet & Media Analyst *Laura Martin* sought to provide some clarity when it comes to industry trends and growth during a keynote. She offered six primary questions analysts and investors are pondering, beginning with one that centers on insight and **Nielsen**’s Gauge reports in particular. Martin wondered if the Media Distributor metric contains the right competitive set since it doesn’t include social media platforms, video games or other means of media that take up consumers’ leisure time. “If the job to be done is ... to monetize leisure time, which would be Wall Street’s preferred definition, it’s missing a bunch of really key, big time-sinks in this Nielsen Gauge, and also it doesn’t disclose total viewing time,” she said. “Numbers” can be translated to “dollars,” and a trend among streaming services in the past few years has been the introduction of ad-supported tiers as a way to implement another revenue stream. However, despite the fact that those ad tiers have been crucial drivers in gaining new subscribers, are two revenue streams enough to compete with the likes of **Apple**,

**Google** or **Amazon**, who have a handful of revenue-generating areas and don’t rely on streaming? Speaking of making money, Martin referenced a consensus Wall Street belief that linear TV would move to CTV. In her view, that’s not the reality anymore, and instead, the competitive advantage is performance from a UX and data-collection perspective. “It isn’t that connected television necessarily is going to take share from linear TV. I think it is far more exciting that it’s taking share today from **Meta** and **Google Search**, as Google Search turns into more generative AI answers. I think more and more of that performance-based revenue is coming to connected television, following Amazon’s lead,” Martin said. Similarly, she wonders if global distribution is more important for economics than content quality, once again referencing the prowess that a large-scale company like Google or Apple serves as. Fifth on her list of Wall Street Qs posed the question of whether or not peak TV is behind us. Lastly, she debated if media is becoming an irrelevant investment category, citing AI as a driver for other competitors.

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## WRAPPING UP IN DENVER

**Warner Bros. Discovery** VP, Content Licensing *Madison Wojciechowski* was transparent in the uncertainty that resides in the company as it prepares for a split. She’s been at WBD for nearly nine years, noting that she first started when **Warner Media** was bought by **AT&T** and **HBO Max** was just getting off the ground. “We’ve had a lot of different changes now with Discovery, and then, who knows? You guys know as much as I know,” she said, before addressing the question of how important having well-known IP is to scaling streaming services. “We’ve always had a robust marketplace for licensing, and for us, obviously, it’s a big mechanism for revenue generation. But it’s also a way to get brand extensions with IP circulated,” she said. Nice segue. – Gone are the days of making an appointment to catch a show’s premiere. Now, shows are often released on streaming services alongside linear debuts, which has brought on questions of how companies should window their content to maximize interest and, of course, revenue. “We really view a premiere as the very first time that a viewer discovers and presses play on a piece of content, no matter where it is,” **AMC Networks** EVP, Streaming *Courtney Thomasma* said on a panel. “It could be an SVOD second window, or it could be a downstream, FAST opportunity where they encounter that content. As we’re thinking about programming our services in an era of uber fragmentation, we think it’s increasingly important to track those fragments, wherever and whenever they occur, and also it provides a lot of opportunity for us, because the long-tail consumption and discovery around catalog is massive and growing.” Thomasma elaborated that it’s not uncommon

for AMCN to see a title spike months or even years after it was first released. AMCN holds meetings every Monday to stay on top of emerging surges, allowing the company to capitalize on that interest through marketing and supporting it on whichever platform it resides on.

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## KAITZ DINNER OUT; KAITZ EVENT IN

Goodbye, Kaitz Dinner. Hello, Kaitz Event—emphasis on event. **CFX** teased in April that the more than 40-year-old fundraising dinner would evolve into something new this fall. On Friday, the **NCTA Education Foundation** [unveiled](#) a few details for the Oct. 22 event at the New York Marriott Marquis—a casual chic dress code (ditch the suit and tie; sneakers welcome), “elevated” culinary experiences and live and silent auctions supporting industry talent. More is to come, but the annual **ChangeMaker Awards** will still be presented at the gathering. And based on a FAQ, it sounds like there’s still a dinner with assigned seating. “This year, we’re shaking things up and reimagining the event, not as a departure from legacy, but as a bold evolution. We’re leaning into a vibrant, celebratory atmosphere that prioritizes connection, storytelling, leadership and purpose,” said the NCTA Education Foundation, which fully absorbed **The Walter Kaitz Foundation** in 2024. As **CFX** first [reported](#) in April, Kaitz will take place during the industry’s new Leadership Development Week, a reimagining of the decades-old Diversity Week. The week, set for Oct. 20-22 in NYC, includes the **WICT Network Leadership Conference** and **NAMIC’s Annual Conference**. The initiative culminates with the Kaitz Event, which raises money for grant-giving for workforce development to industry associations. Last year’s dinner raised more than \$1.1 million. **CFX’s** Voices of Impact Magazine also releases during Leadership Development Week with a reception for honorees. Nominations are being accepted [online](#).

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## PARAMOUNT USING DATA, LIVE CONTENT TO FUEL DTC

**Paramount** might be in a state of flux until its merger with **Skydance** is sorted, but in the meantime, it’s gaining momentum with the flagship streaming platforms **Paramount+** and **Pluto TV**. While a large part of that is due to the [success](#) of some of its original shows, both streamers are leaning into the benefits of data and how they can help reduce aspects like churn rates. Paramount Streaming CMO/CDO *Domenic DiMeglio* said the “data-driven culture” is felt across the Paramount streaming unit at large, and it starts the moment a user signs up as that’s when they’re most likely to subsequently cancel. “We are myopically focused on what the onboarding experience is, even before you sign up,” DiMeglio said during a fireside chat at StreamTV Show. “[We’re] working closely with our product and technology team. We have a show picker where after signing up, we’re asking you to input what are your favorite shows or movies, and that helps us solve the cold start problem, so that we’re able to start tailoring all of the

marketing communications in terms of your welcome onboarding journey... as well as it starts helping all the incredible algorithms within the product itself.” The data helps enhance personalization, an area lots of folks at StreamTV Show are looking to improve at. But something a lot of companies don’t have are the high-profile live events that Paramount/CBS carries, such as the **NFL**, **March Madness** or the soccer portfolio the company’s worked on over the years. “There’s nothing that’s going to drive the urgency to sign up for a new service or open an app than, ‘Hey, the game is on right now, and I have to watch it,’” DiMeglio said. “The **NFL**, it’s been incredibly valuable, but it also helped us fuel investment in exclusive sports rights, and we built an entire soccer ecosystem across Paramount+ and **CBS Sports** more broadly, really, to sort of harness the power of live.”

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## SCRIPPS EXTENDS DEAL TO KEEP WNBA ON ION

**ION** will continue to broadcast **WNBA** games on Friday nights for the foreseeable future, thanks to a new multi-year agreement between the league and **Scripps**. It’s no surprise, as Scripps has recently spent a lot of time lauding the performance of **WNBA** and **NWSL** programming on the network. “On the national side, sports is a great story for us,” *Carolyn Micheli*, EVP, Chief Communications & Investor Relations Officer, said at a media symposium in May, adding that Scripps is “seeing really nice growth in rates for that inventory on ION.” The media company recently secured broadcasting rights for all non-nationally exclusive Las Vegas Aces games via its **Vegas 34** station. It also cut a deal to give DirecTV customers more access to **WNBA** broadcasts airing on Scripps stations around the country, not just via ION. For the 2025 season, which kicked off in May, ION is airing 50 regular season games, following a record-breaking 2024 season in which ION’s “WNBA Friday Night Spotlight” telecasts saw a 133% increase in average viewership YoY. At that same symposium, Micheli also touted “the over-the-air reach that we give [the WNBA], that’s a unique value proposition, and really has incrementally added to their audience,” noting the “really great relationship” that Scripps has formed with the league.

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## ZONE-IFY LAUNCHES FREE GAMES

**Zone-ify** announced that users can now play more than a dozen free games with their TV remotes on the AVOD platform. Customers don’t need to download the games, and unlike **Netflix’s** games library, you don’t need a mobile device to access them, which Zone-ify says makes it the first AVOD platform to offer native gaming that lets players jump in instantly. The company also has plans to offer the interactive feature as an advertising and sponsorship option to brands who want to engage customers with playable content. Zone-ify games are available through **Comcast**, **Cox**, **Buckeye Cable** and **DirecTV U-verse** as well as via CTV platforms **Amazon Fire TV**, **Android TV** and **Google TV**. They’re also coming to **Roku**, **Apple TV**, **Samsung**, **LG** and **Vizio’s** CTV products soon.

## READING LIST

Business writer and industry educator *Craig Leddy* is releasing his first book in September. “Fast Forward: The Birth of Video Streaming, Media’s Wild Child,” delves into the team behind **Time Warner’s** Full Service Network (FSN), which used cable to bring on demand movies, electronic shopping, gaming and more interactive services straight to the TV in the 1990s. It was a concept so ahead of its time that Leddy likens it to inventing a gasoline-powered car before there was gas. “As a business journalist, I covered the rise of digital TV and the FSN project. I got to know the developers and believed their story was worth telling,” he said. You can reserve your copy or get an excerpt by clicking [here](#).

## DOING GOOD

**Optimum Business** and the **LIA Foundation**, the charitable arm of the **Long Island Association**, announced the winners of the

second annual L.O.C.A.L. Small Business Grants. Forty small businesses in Nassau and Suffolk counties in Long Island, New York will receive \$5,000 awards to support their long-term growth and success. This year’s winners include the John Theissen Children’s Foundation, which creates restful spaces and events for children with serious illnesses, and TrueCare, an adult day care center that plans to build accessible ramps so clients can enjoy outdoor space. Optimum Business and LIA will honor grant winners at the 2025 Small Business Summit on June 18.

## PEOPLE

Broadband infrastructure company **Render Networks** has added two new executives to its leadership team. *David Hicks*, who most recently served as VP of Construction at **Cox Communications**, joins as Chief Strategy Officer. *Anish Kelkar*, previously from **IBM** and **Bell Labs**, will now serve as Chief Revenue Officer.

# CABLEFAX DASHBOARD

### Social Media Hits



### Quotable

*“For measurement, I always like to use a different historical analogy, which is the collapse of the Soviet Union. So for years, there was one way to do something in Russia, right? There was Nielsen. They had one way. And when the Soviet Union collapsed, they had to figure out how to work everything else. And that wasn’t easy for a lot of people.”*



- **TVREV Lead Analyst Alan Wolk**

### Up Ahead

- JUNE 23-25: [Broadband Communities Summit, Houston, TX](#)**
- JUNE 23-27: [WICT Network Rising Leaders Program, Savannah, GA](#)**
- JULY 17: [Fiber Broadband Association Regional Fiber Connect, Anchorage, AK](#)**
- JULY 21-24: [Indatel Business Symposium, Kansas City, MO](#)**
- JULY 27-29: [NTCA Summer Symposium, Hilton Head Island, S.C.](#)**