

# Cablefax Daily™

Friday — March 25, 2016

What the Industry Reads First

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## Charter Merger: What's Next after Shot Clock Ends?

The FCC's informal 180-day shot clock to review the **Charter/Time Warner Cable/Bright House** merger reached its end Thurs. The clock, which can be stopped if the staff's review is delayed for reasons outside the FCC's control, was paused for 2 weeks in Jan. No comment from the agency on when a decision might drop, but a spokesman made sure to remind us that the shot clock is a guideline, not a requirement. Although the Commission seeks to meet the 180-day benchmark in all cases, he noted that its statutory obligation to determine that an assignment or transfer serves the public interest takes precedence over the informal timeline. According to the FCC, the failure to release an order within the 180-day benchmark is not indicative of how it will resolve the issues raised in this proceeding. Nonetheless, an order approving the deal with conditions is expected. *Reuters* reported Wed that a decision might not come this week. Among reported conditions is a provision that would prevent new Charter from limiting content providers' ability to offer its programming to online distributors. Charter execs were still meeting with FCC officials this week to tout benefits of the deal. According to an FCC filing, on Wed, Charter's regulatory gang, including evp of government affairs *Catherine Bohigian*, and *Alex Hoehn-Saric*, svp of government affairs, discussed how the merger might serve the public interest. They also talked about new Charter's commitments, including settlement-free interconnection under the company's interconnection policy, CableCARD support, broadband service without usage-based pricing or data caps, and enforcement of those commitments. The meeting followed a similar one on March 16, during which CEO *Tom Rutledge* met with agency chmn *Tom Wheeler*. Charter execs addressed the company's plan to significantly expand its residential network to increase broadband and video competition, \$2.5bln investment in building out its network to increase competition in the enterprise market, and the deployment of more than 300K out-of-home Wi-Fi access points to increase wireless competition. With approvals from most state PUCs, the merger's outcome rests only with CA (assuming an FCC OK is coming). As the review finally enters the home stretch, consumer groups made their last attempt to block the deal. A coalition of 21 consumer advocacy groups wrote to the FCC earlier this week, claiming the merger would create another **Comcast**, which terminated its TWC bid nearly a year ago.

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**Rumor Mill:** TiVo is in merger talks with Rovi, *NY Times* first reported Thurs. The exact price reportedly remains under negotiation, with TiVo shareholders expected to end up with 30% of any combined company. Both TiVo and Rovi said they don't comment on M&A speculation. The reported merger talk comes as TiVo restructures its management and operations. It tapped *Naveen Chopra* as interim CEO in Jan, succeeding *Tom Rogers*, who is now non-executive chmn of the TiVo board. The company also recently shifted its focus to MVPD business from retail. Tivo shares are trading at around half their level in Aug, while Rovi shares have steadily risen since Nov.

**Comcast Expands Internet Essentials:** Comcast is teaming with the **Dept of Housing and Urban Development's** ConnectHome initiative to extend its Internet Essentials program to public housing residents in Miami-Dade County, Nashville, Philadelphia, and Seattle. The MSO also announced the latest Internet Essentials milestones: In less than 5 years, the program has now connected more than 600K low-income families, or more than 2.4mln Americans. 2015 was the program's most successful year, with 30% increase in enrollments over 2014.

**Media Firms Fight Anti-Gay Bill:** Cable and media companies, including **Discovery Comm, Time Warner, Comcast, 21st Century Fox, and the Weinstein Co** are among companies urging Georgia GOP Governor *Nathan Deal* to veto what opponents call an "anti-LGBT" bill. Georgia's legislature recently passed a bill that would give faith-based organizations in the state the option to deny services to gay people. "Discovery Communications has a 30-year commitment to the values of diversity, inclusion, and acceptance of all cultures and lifestyles. As a purpose-driven company, we strive to promote a value system that respects differences, empowers communities, and inspires us all to create a more vibrant world. We strongly oppose any laws tolerating discrimination of any kind. We urge Gov. Deal to veto the proposed Georgia law that would limit the freedoms and protections of LGBT residents of Georgia," the company said in a statement. "At Time Warner, diversity in all its forms is core to our value system and to the success of our business. We strongly oppose the discriminatory language and intent of Georgia's pending religious liberty bill, which clearly violates the values and principles of inclusion and the ability of all people to live and work free from discrimination. All of our divisions – **HBO, Warner Bros. and Turner** – have business interests in Georgia, but none more than Turner, an active participant in the Georgia Prospers campaign, a coalition of business leaders committed to a Georgia that welcomes all people. Georgia bill HB 757 is in contradiction to this campaign, to the values we hold dear, and to the type of workplace we guarantee to our employees. We urge Governor Deal to exercise his veto," Time Warner said. **Sony Pictures, Lionsgate and Starz**, also asked the governor to veto the bill.

**Nielsen Study:** Millennials consume content differently depending on their living situation, according to the latest **Nielsen** report. It divides millennials into 3 groups: Dependent Adults, who live in someone else's home; On Their Own, who live in their own home without kids; and Starting a Family, who live in their own home with children. The report found 97% of 18 year olds live in someone else's home, primarily a parent or parent, about 1/3 of 26-27 year olds falls into each of the three life stages, and nearly 90% of 34 year olds live in their own home – approx 60% with children. Millennials in the Starting a Family group are more likely than those without children to have pay-TV service or a working antenna, "This implies that doing without cable and solely relying on Internet-streamed video may be a life stage choice rather than a permanent decision. By comparison, those who are On Their Own are the least likely to have pay-TV service, and most likely to be in a broadband-only home. In terms of live TV viewing, millennials spent 2.75 hours daily watching live TV in 4Q, and approx 1.5 hours using TV-connected devices. That's a total of just more than 4 hours of TV viewing time. Dependent Adult millennials watch less live TV than the average (around 2.5 hours) and spend less time with the TV set overall. On Their Own millennials have the lowest penetration of traditional sources of video and spend the most time outside the home. As a result, they watch the least amount of live TV of the 3 life stage groups (just a little over 2 hours). However, they have the highest penetration of multimedia devices and access to SVOD services and so spend the greatest amount of time with TV-connected devices (1.5 hours). Millennials who are Starting a Family have greater multichannel penetration than the On Their Own group (79% vs 72%) and otherwise are more likely to have a working antenna (14% vs 12%). They also spend the most time at home of the 3 life stage groups. These factors mean that the Starting a Family group watches the most live TV (3.27 hours) and make the greatest total use of TV screen (4.67 hours).

**Cable Hall of Fame:** The Cable Center announced the members of its 2016 Cable Hall of Fame Honorary Commit-

# BUSINESS & FINANCE

tee, who will serve as the ambassadors for the Cable Hall of Fame celebration to be held as part of INTX in May. The committee is chaired by *Michael Willner*, pres/CEO of **Penthera Partners**. *Michael Fries*, pres/CEO of **Liberty Global**, is the international chair. Members include execs like *Mark Bowser*, evp/CFO, **Cox**, *Steve Burke*, **NBCUniversal** CEO and *Ann Carlsen*, founder/CEO of **Carlsen Resources**.

**Roku 4K TV:** At CES 2 months ago, **Roku** announced plans with **TCL** to ship new TCL Roku 4K models. TCL launched 6 new 4K TCL Roku TV models available starting Thurs on **Amazon.com**. The new 55" (\$599) and 65" (\$999) models will join TCL Roku TV's S-series lineup, and the premium P130 series will be offered in 43" (\$499), 50" (\$599), 55" (\$699), and 65" (\$1099) screen sizes.

**Ratings:** Tues' **MLB** game on **ESPN** in which the **Tampa Bay Rays** defeated the **Cuban National Team** is the highest-rated MLB preseason telecast on any net since 2004, according to **Nielsen**. It generated a 0.8 metered market rating. The game was played in front of 55K+ fans, including *President Obama*, in Havana, Cuba. In addition, it became the most-streamed MLB preseason game ever on WatchESPN, generating 5.4mln total minutes viewed and 99K unique viewers.

**Programming:** **Travel Channel** greenlit "Expedition Unknown" for a 3rd season to air later this year.

## Cablefax Daily Stockwatch

Company	03/24 Close	1-Day Ch	Company	03/24 Close	1-Day Ch
<b>BROADCASTERS/DBS/MMDS</b>			<b>BROADCASTERS/DBS/MMDS</b>		
DISH:	47.91	0.09	ECHOSTAR:	43.94	0.62
ENTRAVISION:	7.15	0.02	GOOGLE:	735.30	(2.76)
GRAY TELEVISION:	11.50	(0.05)	HARMONIC:	3.23	0.04
MEDIA GENERAL:	16.15	(0.11)	INTEL:	31.88	(0.12)
NEXSTAR:	42.56	(0.89)	INTERACTIVE CORP:	45.71	0.08
SINCLAIR:	30.35	0.04	LEVEL 3:	51.59	0.30
TEGNA:	23.37	(0.42)	MICROSOFT:	54.21	0.24
<b>MSOS</b>			NETFLIX:	98.36	(1.23)
CABLE ONE:	437.16	1.77	NIELSEN:	52.00	0.07
CABLEVISION:	32.96	(0.02)	SEACHANGE:	5.33	0.12
CHARTER:	198.34	(3.98)	SONY:	25.47	(0.1)
COMCAST:	60.01	0.76	SPRINT NEXTEL:	3.26	0.11
GCI:	17.81	(0.03)	SYNACOR:	1.43	(0.02)
LIBERTY BROADBAND:	56.89	(0.29)	TIVO:	9.45	1.79
LIBERTY GLOBAL:	36.82	(0.03)	UNIVERSAL ELEC:	61.98	0.77
SHAW COMM:	18.86	(0.22)	VONAGE:	4.46	(0.03)
SHENTEL:	25.61	(0.12)	YAHOO:	34.86	0.06
TIME WARNER CABLE:	202.70	(1.75)	<b>TELCOS</b>		
<b>PROGRAMMING</b>			AT&T:	38.88	0.34
21ST CENTURY FOX:	27.75	(0.04)	CENTURYLINK:	31.16	0.14
AMC NETWORKS:	63.89	0.26	FRONTIER :	5.27	0.06
CBS:	54.06	0.56	TDS:	28.43	(0.14)
CROWN:	5.12	0.02	VERIZON:	53.56	0.65
DISCOVERY:	27.99	0.18	<b>MARKET INDICES</b>		
DISNEY:	97.22	0.39	DOW:	17515.73	13.14
GRUPO TELEvisa:	27.68	(0.18)	NASDAQ:	4773.50	4.64
HSN:	52.94	0.48	S&P 500:	2035.94	(0.77)
LIONSGATE:	21.31	0.17			
MSG NETWORKS:	16.74	(0.56)			
SCRIPPS INT:	64.01	0.53			
STARZ:	26.55	0.22			
TIME WARNER:	70.01	(0.68)			
VIACOM:	44.05	(0.12)			
WWE:	17.12	(0.23)			
<b>TECHNOLOGY</b>					
ADDVANTAGE:	1.94	(0.02)			
AMDOCS:	58.93	(0.43)			
AMPHENOL:	57.17	0.31			
APPLE:	105.67	(0.46)			
ARRIS GROUP:	22.90	(0.22)			
AVID TECH:	6.44	(0.05)			
BLNDER TONGUE:	0.37	(0.04)			
CISCO:	27.96	0.13			
COMMSCOPE:	26.52	0.07			
CONCURRENT:	6.04	(0.2)			
CONVERGYS:	26.62	0.03			
CSG SYSTEMS:	42.25	0.01			

## Cablefax Industry Jobs

### TIP 1 : Target Candidates!

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## PROGRAMMER'S PAGE

### Seeing is Believing

With the recent success of streaming services' original programming, **Hulu** is at it again with another hope for a hit, "The Path" (debuting March 30 on Hulu.com). The series' storyline is new, but the execs behind the lens are fan favorites—"Friday Night Lights" and "Parenthood" producer *Jason Katims* produces the series written by *Parenthood* co-worker *Jessica Goldberg*, who serves as show creator and writer. Goldberg created a series that explores the challenging, often complicated questions we ask ourselves about faith and belonging, through an upstate NY cult called the Meyerist Movement, led by *Hugh Dancy's* character, Cal. The idea for the show came after a rough year for Goldberg, involving a parent's death and her own divorce, when she had what she describes as a "crisis of faith." "I started thinking about what that is—that people go through in their lives where they have a moment when what they believed in gets shattered." *Aaron Paul* plays Eddie in the series, a man questioning his devotion to the movement after returning from a mysterious training in Peru, even though his wife Sarah (*Michelle Monaghan*) is a high-level member. Crafting an entire fictional yet interesting religion isn't easy—and writers drew from all different types including Eastern religions, traditional organizations and cults, and chose their favorite aspects from each. The end result is the mystical, sometimes mysterious and sometimes scary, Meyerist Movement with its many, often flawed and troubled followers. Goldberg and Katims are no strangers to gripping characters, either. "One thing this world allows is for you to tell stories about people who are drawn to a faith like this, and usually you see a lot of more broken, more damaged people with dramatic stories." At the heart of it all are the characters we meet and the inner conflicts they struggle through, and Goldberg wants viewers to go on this journey with them. "I just hope people go on the ride—it's a crazy ride." — *Kate Salava*

**Reviews:** "Magic in the Making," Monday, 9pm ET, **Aspire**. Fellow **Boys & Girls Club** alums *Magic Johnson* and ballerina *Misty Copeland* discuss her humble origins and late start in dance through her being named American Ballet Theater's first principal dancer. Copeland sees herself as an athlete. Indeed, her daily schedule of classes and performances is grueling and, like Johnson when he was playing basketball, she enjoys ice and massage to recuperate. Johnson is a good interviewer, at ease on camera and conversational. His laid-back manner seems to help Copeland open up about her life and beliefs. Supplemented with apposite footage of Copeland's dancing, this is a useful introduction to a great artist and activist. -- "Lopez," premiere, Wed, 10pm, **TV Land**. Yet another variation on the theme that *Larry David* wrote, beginning with "Seinfeld." Here *George Lopez* plays a version of himself and, like David in **HBO's** "Curb Your Enthusiasm," he is a hapless schlep who's a magnet for problems. His ex-wife is mad at him, ditto his daughter and his white, racist neighbors. Deft writing and a fine ensemble—if former L.A. mayor *Antonio Villaraigosa* isn't a regular he should be—lift the pilot ep's spirits, as does Lopez with his mordant asides. There are few belly laughs, but chuckles occur throughout, particularly at the witty commentary on race and class. - *Seth Arenstein*

#### Basic Cable Rankings

(3/14/16-3/21/16)

##### Mon-Sun Prime

1	FOXN	1.1	2615
2	TBSC	0.9	2107
3	TNT	0.8	1820
4	HGTV	0.7	1745
4	AMC	0.7	1669
4	USA	0.7	1596
7	CNN	0.6	1501
9	HIST	0.5	1295
9	DSNY	0.5	1291
9	TRU	0.5	1089
9	FX	0.5	1074
13	ADSM	0.4	1050
13	MSNB	0.4	1048
13	DISC	0.4	1047
13	FOOD	0.4	974
13	ID	0.4	929
13	LIFE	0.4	910
13	TLC	0.4	909
13	NAN	0.4	839
21	BRAV	0.3	786
21	A&E	0.3	767
21	FRFM	0.3	752
21	SPK	0.3	714
21	TVLD	0.3	714
21	ESPN	0.3	685
21	HALL	0.3	665
21	DSJR	0.3	655
21	OWN	0.3	574
21	HMM	0.3	555
21	NKJR	0.3	532
32	CMDY	0.2	512
32	LMN	0.2	503
32	APL	0.2	499
32	BET	0.2	499
32	SYFY	0.2	483
32	VH1	0.2	472
32	TRAV	0.2	465
32	MTV	0.2	453
32	INSP	0.2	453
32	GSN	0.2	426
32	NGC	0.2	421
32	EN	0.2	417
32	WETV	0.2	412
32	HLN	0.2	400

\*Nielsen data, supplied by ABC/Disney, is based on coverage area of individual networks

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# Cablefax Daily™

Friday — March 25, 2016

What the Industry Reads First

Volume 27 / No. SPECIAL

## Multiscreen Summit: An Executive Summary

Our Multiscreen Summit was a day of insights, brainstorming and prognosticating, with so much packed in that we've decided to put together this special executive summary of the March 8 event in NYC. The conference covered everything multiscreen—from advertising to virtual reality to social platforms to even emerging areas such as eSports. Please enjoy the highlights from each session outlined below. And we hope to see you at the TV Innovation Summit on Sept 22 in NYC.

## Opening Keynote: The Future of TV... Which Screen Wins?

In *Laura Martin's* opening keynote for the day, titled "The Future of TV: Which Screen Wins?," the answer was definitively mobile. "Wall Street puts a higher value on companies that can generate revenue around the world, and a lower value on US-only revenue streams," said the **Needham & Co** managing director and senior analyst, Entertainment & Internet. An example is **Facebook**, which reaches more than a billion people globally. Meanwhile companies like **Comcast**, that are gated by US borders are valued down by Wall Street, she said. And while Martin herself makes very fine distinctions between major media companies like **Scripps**, **CBS** and **Fox**, "that's not what the market says... The market views them as perfect substitutes." Media stocks underperforming tells us something, she said. "What the market is worried about is that the cash flow streams for the next 10 years are going to be worse than the S&P average—not better." The acceleration of technological innovations, the proliferation of cell phones, the complexity of in-home and out-of-home viewing, the industry's measurement issues, and the question of whether OTT services are cannibalizing linear TV viewing or serving as additive are all creating massive disruption. Mobile video viewing in particular is creating "new windows of time"—even though when looking at how people consume video content throughout the day, television is "still the bulk of usage per day." That said, mobile is the one form of usage that is growing. For young people in particular, it's no longer about the "best available screen." It's about the personal devices for them. And in terms of the growth of the advertising market, TV is flat. Not so with mobile. "Mobile ads are growing 4 times fast-

er than video ads online," Martin said. Concerns remain, however, with viewability and ad fraud pervasive in the online advertising world. Speaking about the power of the bundle, Martin said that "we are redefining consumer choice in this country." We now have skinny bundles, SVODs like **Netflix** and **Hulu**, and OTT services like **HBO Now** and **World Surf League**. Martin believes we'll be seeing many more of the latter, and fewer skinny bundle packages due to the difficulty of securing content deals. Her best business advice for the day? Know the "value of the bundle," she said. "If you have any product, and you can add any other product, do so."

## Acronym Soup: How to Survive the Multiscreen Chaos

Monetization across multiple devices is just at its beginning, execs agreed, but there's a lot of experimentation happening. **Time Warner Cable** video product group VP *Alix Cottrell* said TWC is focused on building its ad platforms. "It's new inventory for the advertisers, and it's very targeted inventory." Moreover, it's important to take monetization features like transactional, on demand and EST—all things that are important to customers—and move them into the IP space. Providing flexibility in terms of packages is key as well. TWC has "been very vocal and aggressive on being on as many platforms as we can," she said—with the current count being 8. It has also begun using a **Roku** box as a set top box replacement, in order to meet consumers where they are in a multiscreen world. "We want to drop that notion of the old-style cable company and start moving into the future," she said. For **TV One's** part, enhancing the brand across all platforms is a major focus, because it increases the opportunity to monetize. "We're a little bit behind in the multiscreen world," admitted TV One marketing svp



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Lori Hall, but what's key from her vantage point is "making sure the consumer experience is optimal." Current challenges include renegotiating with studios for content rights and figuring out a windowing strategy that doesn't cannibalize linear viewing. It's also important to optimize content for specific platforms as well as shift from "pushing out content to pulling people in" to create their own content on various platforms. At **Comcast**, partnerships with programmers, such as a recent content package surrounding **ABC's** Oscars content, are making a real difference. In Comcast households in the 18-49 demo, ratings were up 39%, according to *Peter Nush*, vp, product management for Comcast's X1 Entertainment Operating System, thanks to pre-show, post-show and back stage content all in one place. And thanks to the multiscreen push, "technologies and business relationships are starting to evolve in multiple ways—everything from stackable rights, to cloud DVR, to even OTT SVOD services." **CSG** Digital Services pres *Kent Steffen* is helping distributors understand their consumers better through defining their brands and differentiating themselves among the massive competition. It's about moving well beyond the video distribution world, which used to be chiefly about getting content on platforms, and asking "how am I going to compete for this customer's loyalty." He foresees more investment in EST. Bundling with a core linear piece gives you an additional revenue stream, and he's starting to see a combination of digital services that help brands retain their subscriber base. But it's important to maintain a quality of service, according to **Evolution Digital** pres & CTO *Brent Smith*—and if cable operators are bypassed for OTT services, the quality of that live streaming will suffer. Consumers will be "up for a rude awakening" when they're not able to watch the content they want to watch, he said. His company's focus is on helping tier 2 and 3 operators make the IP transition in an affordable way through an IP-capable cable box. But he said increasing the value of the broadband connection is the best way to help those operators. "What they see is an uplift in broadband revenue," with additional OTT services "driving the consumer to take a higher bandwidth."

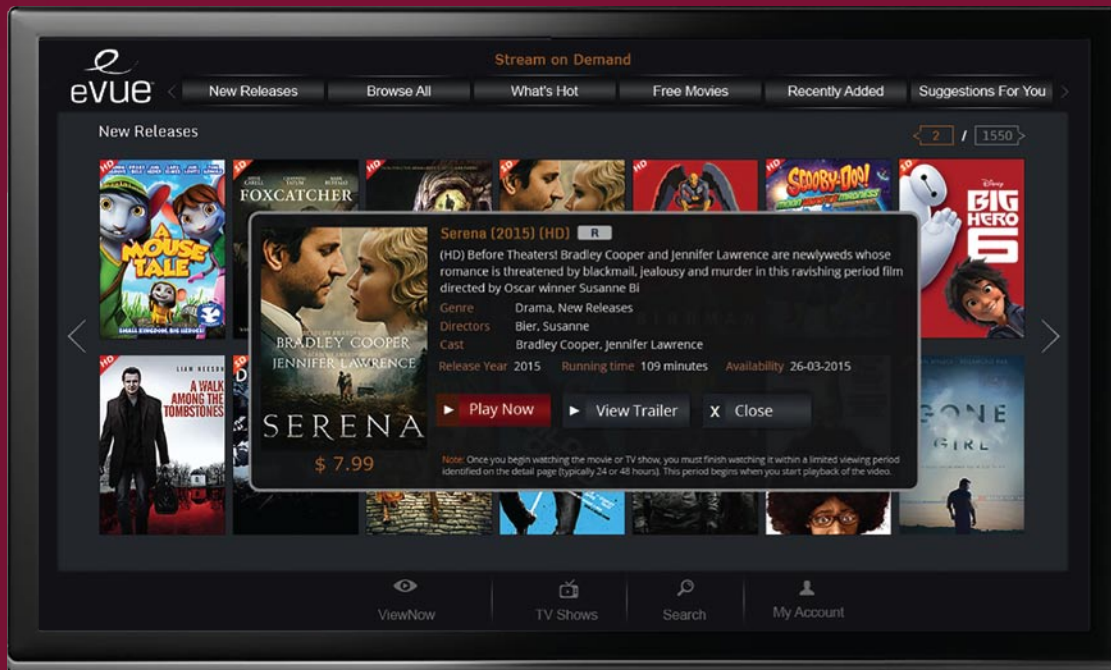
## TV Advertising Everywhere: Harnessing the Power of Multiscreen Marketing

How has the convergence of linear and digital advertising changed marketing? "It's a sea change," said **Starz**

marketing evp *Alison Hoffman*. "It's a 2-way conversation now," and more about launching campaigns, getting feedback and making adjustments. "Content is king, but data is really king for us as marketers." **Viamedia** pres/CEO *Mark Lieberman* agreed. "Data is power," and it's informing ad campaigns at the set-top level for cable companies, 60 of which he counts as clients. One technique that's working for Viamedia is "audience extension," which allows advertisers to target a specific show's audience on another network, "wherever they may be." **Watchwith** CEO *Zane Vella* was adamant that "the traditional linear television model doesn't work very well on mobile devices," and we're seeing the public reject this. But what's the alternative? Using data addressability to reach viewers within specific programs, such as through digital integration deals with the use of overlays for a hyper-targeted audience. The idea is to provide an alternative to "rolling, interruptive ads," he said. Indeed, "the ad tech and the data infrastructure haven't caught up just yet to make it a good experience," said **AOL's** head of programmatic TV *Dan Ackerman*. The programmatic world "has still been struggling with a lot of non-human traffic, fraudulent traffic, viewability..." Fortunately, television is 100% premium—so you don't have those concerns," he said. In fact, he believes TV is coming into the fold at the right time—and he expects more programmatic deals to surface soon. Meanwhile, **Verizon's** purchase of AOL will allow the company to incorporate mobile assets and overlay STB data, making that data "actionable" and available for advertisers and media sellers, he said. But while programmatic creates certain efficiencies, does it also create more work for the content holders? "From a resource perspective, it gets really, really hard," said Hoffman. "There are an infinite number of platforms to program as a marketer," and not enough bandwidth for all the work. And actually creating the content is important part of it, too. Still, programmatic "takes some of the guesswork out of it," she said. "You see what's working, where." For **AT&T's** part, the company recently made an announcement about a programmatic partnership with **Videology**, said AT&T AdWorks TV, online and mobile director *Matt Van Houten*. But it's important to note that it's not all about automation. "We're looking at it as a private marketplace" consisting of linear inventory, digital inventory, and the combination of 3rd party and 1st party data. "It's not real time bidding for us on the TV side," he said. The company is also very focused on addressable advertising, with 13mln house-



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holds currently “addressably enabled,” and a goal of increasing that to the entire footprint of 26mln homes.

## Virtual Reality Show: How VR-Enabled Content Will Change the Content Game

Virtual Reality isn't going to follow the crash pattern of 3D television, our panel predicted. For one thing, it's much more social than 3D. A few years from now, consumers may be able to put on a headset and “attend” a sporting event with a friend even though they're 3,000 miles away, said **Turner Sports** evp, production and chief content officer *Craig Barry*. Similarly, VR can take applications like **Match.com** to a whole new level. **Parks Associates'** *Glenn Hower* is excited to see how VR changes visual storytelling experience—but that also creates a challenge in finding creators and producers ready to take a really big risk in how they tell a story. That's a big part of what **Clever Fox** does as a production company. “We've found that traditional filmmakers are super excited about getting in there and experimenting... There's a lot of trial and error right now,” said *Clever Fox* chief content officer *Dekker Dreyer*. He said what really helps VR is its broad support on many levels, whether it's the lower end with **Google** Cardboard doing a branded campaign with the *NY Times* to the mid-grade (pre-orders of **Samsung** Galaxy Phone 7 get a free Gear VR headset) to the higher-end, such as **Oculus Rift** or **Playstation's** upcoming headset. One big question is how will VR be monetized. “What you really come down to is the viewer is going to pay a premium for the experience or they are not. If they do, great, that helps solve a lot of problems. Otherwise, you're going to have to look into sponsored content or even a native advertising model where you start embedding sponsored ads in the content itself,” *Parks' Hower* said. *Dreyer* reminded the crowd that most people have no experience with VR. “I don't think I've ever seen a leap where the technology for the storytelling is so far beyond what the actual audience is able to experience, and we keep driving it further and further,” he said. “We need to make the best experiences we can, get the audience excited about the medium, and then grow with the audience into these new and interactive spaces.”

## Gaming as Content: Are You Twitching to Get Started?

When it comes to eSports, thank the **Xbox**. It was really the original social network, said *Dan Ciccone*, managing director of **rEvXP**. “When [Xbox] launched in 2002, there were over 25mln units sold. Today there are over 60mln people in the US alone today that pay \$60 a year to use the Xbox Live platform. A lot of that has to do

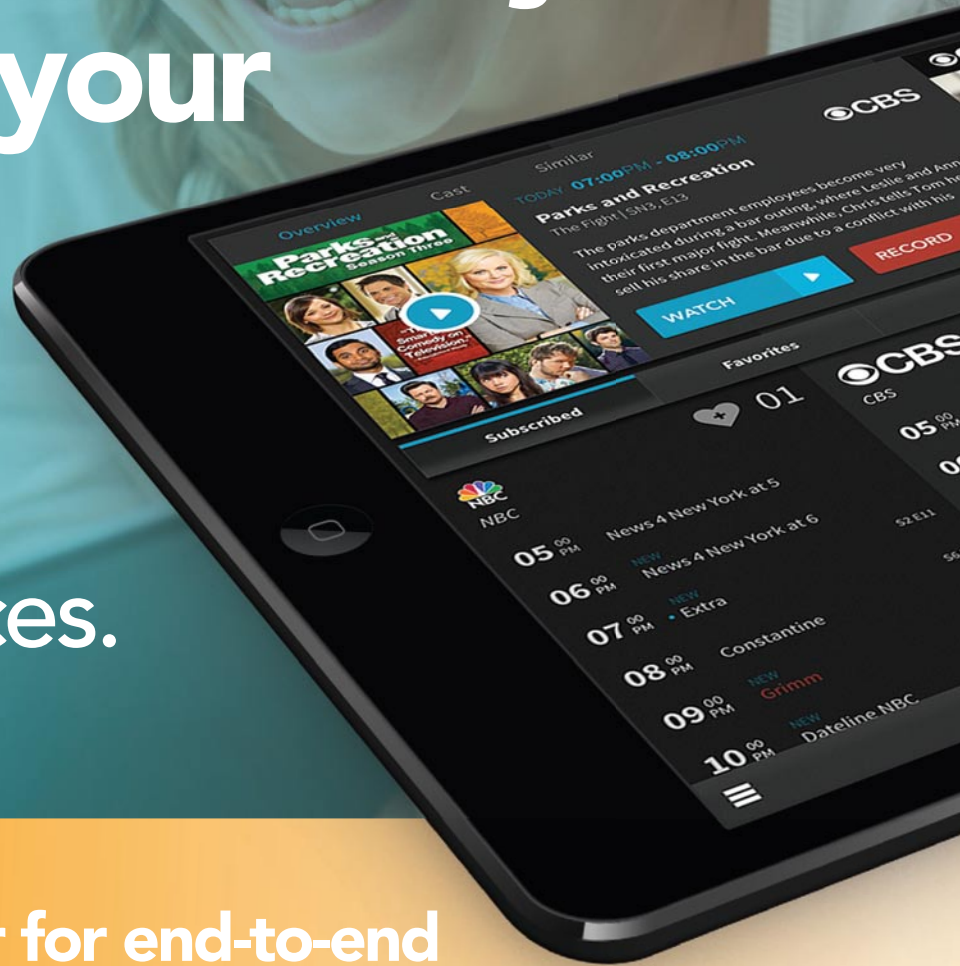
with the social interaction that takes place,” he said. The eSports scene today is a “mixture of being incredibly organized while simultaneously being the Wild West.” There are leagues and tournaments with big prize pools, but it's still a community that's growing from a grassroots basis—*Ciccone* calls it a “local, global community” as it doesn't matter where someone is in a game as the gamers are all working toward the same goal. It's a high concentration of adults 16-34 and primarily men, but more women are getting into the space. “I would argue that eSports is going to be, if it's not already, the first globally accepted sport,” *Ciccone* said. “Soccer has not taken off in the US the way it has overseas. There is really not a type of truly global sport where there's a huge affinity or a major participation at the ground level or viewership level. eSports aims to do that. eSports, I would also project to be the first gender agnostic sport as well.” eSports is primarily taking off because of the technology, with the influencers having access to smart phones and tablets often from the time they were 2 years old, he said. Also helpful is that it's device agnostic—the audience is confident they will find content no matter what they're using. Another key: the talent and influencers make themselves incredibly accessible. “When you follow someone in eSports, they make themselves accessible. They make you care about the content they're putting out,” *Ciccone* said. While eSports talent talks about their personal lives, TV talent often times has self-serving social media pitches, such as “Tune in to see me tonight.” “These guys don't refer to followers as fans; they refer to them as friends.” Good news for traditional media companies looking to play eSports is that the cost of entry is low right now. *Ciccone* sees 2016 as a transformative year that will bring more organization and some consolidation. While **Twitch** and **YouTube** are the biggest players in the space right now, “it doesn't necessarily mean they're doing it right,” he said. And there's some validation for the category that comes with traditional media's involvement. He recommends networks get key influencers involved with projects.

## When Content Attacks: No Structure, No Distribution... No Problem

With the rapid changes in content distribution, where does the traditional TV bundle come out? “A lot of times when something new comes into the industry, there's a question of whether or not we're breaking the model. It is a fear,” said **DISH** programming gm *Thea Ellis*. “Quite honestly, from a DISH perspective, we have looked at it very much as a customer segmentation [issue.]” DISH was under-indexing with millennials, hence the creation of **Sling TV**. “For us, it very much has been a win-win,”

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she said. **Proskauer** senior counsel *Paresh Trivedi* agreed that there doesn't seem to be a destruction or degradation of traditional TV. "What we're seeing now is the evolution of that pay TV ecosystem from being a bundled package of programming services you get in your living room to a bundled package of programming services you get anywhere or on any device," he said. VOD is one of the first examples of success in this new model on the ad sales side, according to *Chris Pizzurro*, **Canoe's** head of business development, sales & marketing. "The learnings we've accumulated there with our programming partners over the years can now be translated into over-the-top, TVE and all the things that are going into negotiations now," he said. Those lessons include the realization that ads are OK to the consumer. Another reason to relax about the changing ecosystem is that adding multiple platforms actually results in more content consumption, **Synacor** CEO *Himesh Bhise* said. There's another opportunity for growth. "What we have found is that as some of our customers have provided their content on new platforms, they're accessing new segments of the audience they hadn't accessed before," Bhise said. Yes, millennials are one of those groups, but it also increases penetration into the 35- to 55-year-old segment as well, he said.

## Brainstormify!: Mastering the Multiscreen Marketing Challenge

**Cablefax** shook things up in the afternoon with an interactive session dubbed "Brainstormify!," a friendly competition in which teams competed in a scenario involving a fictional TV network whose launch of online streaming "Super Chat Live" went horribly wrong. Teams got only a few minutes to devise bullet points for the board on how to fix it. The clever and often hilarious solutions included everything from self-deprecating Twitter campaigns to blaming the SNFU on aliens or, perhaps worse, baby boomers who couldn't figure out the technology. In the end, the baby boomer response won out, with one particularly fun idea involving a viral video with supposed boomers pressing random buttons and declaring "This doesn't look like AOL Instant Messenger... where's MySpace?" Said judge *Ann Lundberg*, **Scripps Networks Interactive** svp, digital ad sales: "It was really fun and creative, and that was a winner." She also lauded the team for including a make good plan for the advertiser, something other teams failed to address. "There's an advertiser who spent a lot of money here, and they need to be satisfied." Kudos to all the teams who participated, and thanks also to our other judges *Angie Branham Britt*, svp of advanced products at **CTAM**, and *Lori Hall*, svp of marketing at **TV One**, who both brought incredible

perspective to the exercise.

## Social Screens: Building Community in a Multiscreen World

With so many screens and social media platforms competing for attention, experts told Multiscreen Summit attendees that cookie-cutter solutions simply don't, uh... cut it anymore. **USA Network** svp, digital *Jeffrey Kaufman* said it's a constant struggle to understand the strengths and weaknesses of every platform, noting for example that **Snapchat** can drive engagement but not necessarily tune in. "You have to be strategic about how you use it," he said. Live social media continues to reign in certain environments, with *Angela Megrey*, vp, social media communications & policy at **Crown Media Family Networks**, noting the groundswell of live tweeting around its original series "When Calls the Heart." "There is appointment viewing still happening," she said. *Adam Naide*, executive director of marketing for social media at **Cox Communications**, agreed that social is becoming increasingly useful for live tune-in. "For Cox, social media is really the hero platform for reinforcing live TV," he said. Talent involvement is also key, but "have your talent be a fan of that platform," said *Jen Corbett*, vp, audience development & marketing at **Discovery Digital Networks**. "It's really just being a member of that community that we see really going a long way." Said Megrey: "The talent isn't just saying 'hey come see me.' They're involved, and they want to hear what their fans are saying." Kaufman recounted how a little make believe can also help, with USA's widely reported success of its "Mr. Robot" social campaigns as case in point. Fictional hacker group "F Society" actually "hacked" into gaming site Twitch TV's livestream during the **E3** gaming conference as well as the **SXSW** mobile app during that conference, with the hacking "victims" able to win Mr. Robot prizes. USA even sent out F Society emails and social interactions based on real-world events such as the **Ashley Madison** cheating website hack. "I don't think we realized how dovetailing that was going to be," Kaufman said, noting that USA made a conscious decision "to take advantage of those moments when they came." It also goes beyond social media: Kaufman noted a 40-50% open rate on its fake F Society emails to fans. Beyond that, **Layer3 TV** CMO *Eric Kuhn* noted that fast changing habits among millennials are driving some away from social media altogether. "There's beginning to be a rebellion and a backlash," he said, noting that the smartest content marketers pay as much attention to offline marketing as they do to social media.



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