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What the Industry Reads First

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Long Live Live: Livefronts Focus on Value of Immediacy

There's the upfronts and the newfronts, so why not add in the livefronts? On Tues, **The Live Streaming Assn**—a nonprofit for live streaming content composed of creators, producers, digital distributors and others—presented the first livefronts Tues in conjunction with *AI Roker's Roker Media* and strategic advisory firm **Brave Ventures**. And it was live streamed (natch) on **Facebook Live**, which showcased the power of live (especially dramatic when a fire alarm started going off during the conference—turned out to be a false alarm) as well as the pitfalls (several viewers complained of choppiness and video freezing). As we increasingly hear of the desire for on demand and binge watching, why are companies worried about live? “The merger between mobile and social is driving this need to know now and this constant communication,” **E!** news & digital evp, gm *John Najarian* said during one of the day's many panels. “If something is trending right now, people want to talk about what's happening in the moment.” Sports continues to be the holy grail of live viewing, with the consensus of a panel of sports execs that the **NFL** ratings drop off if largely attributable to the presidential election. Live is increasingly moving into social realms (see NFL live games on **Twitter**), but no one is looking to ditch the old ways. **WWE** has a huge social media support system, but even so, it recognizes that it has sponsors who are heavy into traditional TV buys, said chief strategy officer and CFO *George Barrios*. “We're trying to position ourselves in each of these areas,” he said. **Snapchat** and **Facebook Live** received much of the attention during the conference. Helping Facebook Live is that live video is extremely engaging, with it notching twice as many engagements (likes, comments, shares, etc) than non-live Facebook video, according to **Tubular** CMO and co-founder *Allison Stern*. The most successful Facebook Live videos are 18 minutes or longer. Why? People have more time to cross over and watch it. “We talk about live streaming, but once you get to 10 minutes, that's actually live programming. Most of us are trying to keep people engaged beyond the 2-minute mark,” said **BET Nets** chief digital officer *Kay Madati*. “While it doesn't have to be highly produced, it still has to be highly compelling.” The panel seemed less enamored with **YouTube Live**. “There is less promotion in their company to drive you there,” said **Cheddar** chief content officer *Peter Gorenstein*. Last month, Cheddar—a live news and entertainment company, announced a partnership with Twitter to broadcast live, daily from 9-10:30am Opening Bell markets coverage and again from 3pm-4pm. **Mashable Studios** pres *Eric Korsh* teased that “we're working with [Twitter] on something coming up.” While that's still in the infancy, it's clear Mashable is a huge fan of Snapchat where it has a Snapchat Discover channel. “It is awesome. The scale of it. The monetization. The repeat visits... It is just a freight train,” Korsh said. With all this talk about various platforms, should content owners create their own platforms for content? “I don't think we would be good at building platforms,” and instead should focus on compelling content, said *Borja Perez*, svp of digital and social media at **NBCU Telemundo Enterprises**. “Platforms are going to come and go. We did **Meerkat** and **Periscope** and now Facebook Live. And we'll work with whomever 2 years from now.” Reports that Snapchat may pursue a licensing model structure in which publishers would get a licensing fee for their content on Snapchat Discover vs selling ads themselves.

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Having grown up in cable, **Univision's Tonia O'Connor** thinks it's a possibility. She continually asks herself: how do we ultimately get to a dual-revenue stream model? Also, measurement remains a challenge. "It makes it hard that each platform has a different definition of use," BET's Madati said. "A Snapchat view is not the same as a Facebook or YouTube view."

AT&T-Time Warner: AT&T CEO **Randall Stephenson** thinks the market is too "pessimistic" when it comes to the regulatory outlook for the proposed **Time Warner** purchase. "Look, this is not **T-Mobile**, which is a classic horizontal merger," said Stephenson at a WSJ **Facebook** Live session Tues. AT&T terminated its T-Mobile acquisition in 2011 after regulators denied the transaction. "We knew going in that this was a high-risk deal... That's why we had such a big break-up fee... We were taking a nationwide competitor out of the marketplace," Stephenson said on the failed T-Mobile merger. He argued that the Time Warner deal won't change the telecom or media competitive landscape as a vertical integration. Post-merger, Time Warner will be a wholly-owned subsidiary of AT&T. Meanwhile, AT&T, using Time Warner assets, intends to explore "third rails that the industry will not and has not touched," including offering new pricing packages, the AT&T chief exec said. The new AT&T would be competing head-to-head with cable operators, he said, citing 5G technology as a "game changer." He expects 5G, which can deliver multi-gigabit speeds, to be rolled out by 2018 and expand through 2020. "The intent is to bring Time Warner and AT&T together and create a very new and very different kind of competitor nationwide," he said. At the event, Stephenson announced that AT&T will launch its DirecTV Now service at the end of Nov. The service will tout 100 channels for \$35/month. Customers can access all of DirecTV's live and on-demand programming through the service. Two other streaming options, which AT&T previously announced as part of its DirecTV acquisition, include DirecTV Mobile, which allows mobile access, and DirecTV Preview, a free service available to everyone, including non-subs. Time Warner CEO **Jeff Bewkes**, speaking at the same session, said the convergence of media and technology is the driving force behind the deal. "We all know they're coming together... That's why we did it," he said.

Spectrum Auction: The **FCC** starts the 3rd stage of its spectrum reverse auction on Nov 1 with a 108 MHz auction target.

Power of Facebook: It's no secret that **Facebook** is doing everything it can to boost its nascent live streaming service, with the **WSJ** reporting this summer that it has agreed to make payments to video creators totaling more than \$50mln. So, would the business be pushing so hard in this space if Facebook didn't want it to? Given that **Univision** is unique with over 90% of its traditional TV viewing occurring live, the answer is yes, said **Tonia O'Connor**, the Spanish-language programmer's chief commercial officer and pres, content distribution. "The expectation with our consumer is that we're going to be live," she said. **Twitch** CRO **Jonathan Simpson-Birt** also thinks we'd be at this point without Facebook. "It's in our culture. It's a format people want to express themselves in," he said. While E! has been quite active in the live space, E! news & digital evp, gm **John Najarian** believes Facebook certainly has played a role. "I don't think this panel would be here talking about live if Facebook didn't turn the fire hose on it," he said. E! began streaming live shows, such as "TV Therapy," on Facebook Live in Aug. Najarian said the net is preparing to launch a new fashion-oriented series on the platform this week dubbed "freeSTYLE." It's E! News' first weekly Facebook Live show focused on fashion and beauty (**Ulta Beauty** is the launch partner).

Bryon Allen Vs. Charter: A federal district court judge denied **Charter's** motion to dismiss **Entertainment Studio Networks'** \$10bln lawsuit against the MSO for racial discrimination. Charter responded by calling the lawsuit "a desperate tactic" that ESN has used before with other distributors. "We will not comment further at this time," the MSO said. The

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ruling came after the *Bryon Allen*-owned company settled a lawsuit with **AT&T**. Allen filed similar racial discrimination lawsuits against **Comcast** and then **Time Warner Cable**, with a federal judge dismissing the \$20mln suit filed against Comcast earlier this month. The company looks forward to trial by jury, said *Skip Miller*, partner at **Miller Barondess**, lead counsel for the plaintiff. "Separately, we fully expect the dismissal of ESN's \$20 billion lawsuit against Comcast to be overturned by the Ninth Circuit Court of Appeals where we are under appeal," he said in a statement.

IoT Security: Sen *Mark Warner* (D-VA), a member of the **Senate Select Committee on Intelligence** and co-founder of the bipartisan **Senate Cybersecurity Caucus**, is asking **FCC, FTC** and the **Dept of Homeland Security** for information on the tools available to prevent cyber attacks on consumer products such as Internet of Things devices. Among his questions: What types of network management practices are available for ISPs to respond to cyber threats, and can ISPs respond to cyber attacks, under the FCC's Open Internet Order?

People: *Rachel Webber* was named evp of digital products, a newly created position leading the digital business across **Nat Geo Partners**. She will report to *Declan Moore*, Nat Geo Partners CEO. Prior to joining Nat Geo, Webber was svp of **Fox Television Group**.

Cablefax Daily Stockwatch

Company	10/25 Close	1-Day Ch	Company	10/25 Close	1-Day Ch
BROADCASTERS/DBS/MMDS					
DISH:	58.73	0.17	INTEL:	35.05	(0.22)
ENTRAVISION:	6.87	(0.01)	INTERACTIVE CORP:	67.09	(0.25)
GRAY TELEVISION:	9.50	(0.1)	LEVEL 3:	46.94	(0.43)
MEDIA GENERAL:	17.31	(0.15)	MICROSOFT:	60.96	(0.05)
NEXSTAR:	51.00	(1)	NETFLIX:	126.39	(0.94)
SINCLAIR:	25.95	(0.4)	NIELSEN:	45.65	(9.29)
TEGNA:	19.85	(0.26)	SEACHANGE:	2.75	(0.01)
MSOS					
CABLE ONE:	589.10	1.05	SONY:	31.84	(0.3)
CHARTER:	256.83	(2.77)	SPRINT NEXTEL:	6.51	(0.42)
COMCAST:	64.60	(0.37)	SYNACOR:	3.07	(0.03)
GCI:	15.49	0.22	UNIVERSAL ELEC:	68.20	(0.7)
LIBERTY BROADBAND:	66.06	(0.46)	VONAGE:	6.41	(0.03)
LIBERTY GLOBAL:	32.20	0.02	YAHOO:	42.52	(0.07)
SHAW COMM:	19.73	(0.03)	TELCOS		
SHENTEL:	26.40	0.10	AT&T:	36.75	(0.11)
PROGRAMMING					
21ST CENTURY FOX:	25.55	(0.03)	CENTURYLINK:	28.46	0.14
AMC NETWORKS:	52.55	2.05	FRONTIER:	4.11	0.01
CBS:	56.01	(0.35)	TDS:	26.30	(0.56)
DISCOVERY:	26.18	(0.44)	VERIZON:	47.80	(0.41)
DISNEY:	92.71	(0.67)	MARKET INDICES		
GRUPO TELEVISA:	25.76	0.11	DOW:	18169.27	(53.76)
HSN:	38.20	0.10	NASDAQ:	5283.40	(26.43)
LIONSGATE:	20.08	(0.04)	S&P 500:	2143.16	(8.17)
MSG NETWORKS:	19.30	0.05			
SCRIPPS INT:	65.15	(0.95)			
STARZ:	31.28	(0.1)			
TIME WARNER:	87.22	0.48			
VIACOM:	41.90	UNCH			
WWE:	19.45	(0.55)			
TECHNOLOGY					
ADDVANTAGE:	1.82	(0.04)			
AMDOCS:	59.07	(0.23)			
AMPHENOL:	65.20	(0.8)			
APPLE:	118.25	0.60			
ARRIS GROUP:	29.52	(0.2)			
AVID TECH:	6.88	(0.26)			
BLNDER TONGUE:	0.56	(0.02)			
CISCO:	30.29	(0.17)			
COMMSCOPE:	31.34	(0.65)			
CONCURRENT:	6.19	0.22			
CONVERGYS:	29.70	(0.19)			
CSG SYSTEMS:	38.66	(0.26)			
ECHOSTAR:	46.48	(0.25)			
GOOGLE:	807.87	(5.24)			
HARMONIC:	5.30	(0.1)			

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