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What the Industry Reads First

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Streaming Sports: All Signs Point to a Continued Full Court Press

It's clear from the skyrocketing number of viewers watching **NCAA** Division I tourney online that streaming of live sports is only going up from here. **NCAA** March Madness Live app, managed by **Turner Sports** in partnership with **CBS Sports** and the **NCAA**, generated an all-time record 69.1mln live streams through the first Sunday of the tournament, an increase of +24% over last year. "We aren't seeing any real cannibalization of linear because of digital or vice versa. We see people consume more because this great tournament is everywhere a fan is," said **Hania Poole**, vp, gm **NCAA** Digital at **Turner Sports**. Latency is always important with online streaming, but it's even more critical with sports. When **Poole** stepped into her position four years ago, she estimates that video was behind a minute to a minute and a half on some devices. "Now I feel like it's shortened to about 30 seconds. Maybe 45," she said. TV has set the benchmark for streaming, **Akamai** CTO **John Bishop** told **CFX**. "There's always been that 45-60 second behind line. That's just been kind of the nature of the Internet. When you look at why, it's largely because the pieces were fragile and immature in the supply chain. Every little element that was touching a lot of the bits created its own little safety net—and safety net in our world means buffer," **Bishop** said, adding that as **Akamai** has expanded its investments the system has become more cohesive. "We put a line in the sand a few years ago to say let's cut the gap from 45 seconds down to sub 20. Last year was the first year we started seeing some line of sight that it was possible. I think this year we're getting better than television on the OTT side. In some cases, we can get a signal faster to you now than a cable TV infrastructure will." That's always been the goal—to get to the point where there's parity between linear and digital. **Bishop** believes streaming has achieved that already in resolution and audience size. "It's no longer a scary proposition to see millions of people concurrently come in to join a basketball game or an episodic or a debate," he said. And on resolution, the Internet is starting to surpass TV with tech such as UHD, VR and 4K. Indeed, the **March Madness** app will offer enhanced VR games powered by **Intel**. At **CSG**, one big focus with its **Ascendon** platform is monetization of digital services. With that monetization goal in mind, **CSG** is keen to improve delivery of sports content as it moves into more true OTT scenarios, said **Sean Casey**, director of product management at **CSG**. **ESPN** is among its clients, with **CSG** working with the programmer on both premium sports content and premium media to be delivered directly to the consumer. **Casey** agrees with **Bishop** that delivery is getting even better, helped in part by adaptive bit rates. "It tests the user's network speed and delivers a stream that's best suited for that speed," he said. "Instead of trying to deliver a big screen experience on your iPhone, it's going to see if you're in a poor coverage area and provide a lower quality experience but one that doesn't buffer." Back to **March Madness**, this year marks the first that **Turner** has used **iStreamPlanet** as the streaming provider for the series—a tip to **Turner**' acquiring a majority stake in the company in 2015. It previously had used **MLBAM**. In **Turner**'s command center, **Poole** and team monitor how

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video is performing with the help of video optimization service **Conviva**, looking at how viewers are experiencing the video, network quality, what bitrate is being served, etc. Anecdotally, she's taken note of fans posting photos on social media of them watching a game on a big screen with a line of devices standing next to it showing the NCAA March Madness Live app. While most streaming is focused on mobile, it's worth noting that March Madness is a different animal with so much viewing taking place during work hours. With that in mind, Turner Sports updated the desktop viewing experience this year. "We completely redesigned it and took it out of flash and made it into an HTML5 player. I think we're one of the first live sports platforms to do that," Poole said. "We made it responsive so it sizes to whatever setting your browser is on, and it has a shot chart that you can expand and some other cool features." Turner also expanded this year to 15 platforms for the tourney from 13, adding a skill on **Amazon's Alexa** (its first foray into voice) and joining its first game console through **Xbox**.

TiVo Voice Search: TiVo will deliver voice search for **Sky's** next-gen Sky Q box in Europe. The solution delivered by TiVo lets consumers use their voice to search for digital entertainment across linear TV and VOD. TiVo offers voice search to a small number of partners, but it has not disclosed them at this time.

Newfronts: Twitter will participate in the Newfronts for the first time, a sign of how video consumption across the platform is becoming increasingly important. Twitter, which has teamed with the **NFL** on Thursday Night games and **PBS NewsHour**, will present original and live programming during the presentation.

Midco Sticks with SeaChange: Midco is upgrading its multi-market **SeaChange**-based VOD system to the next-gen SeaChange Adrenalin multiscreen capable software platform. Slated to go live in the first half of 2017, the platform will allow Midco to maintain centralized on-demand operations over its HFC network, while paving the way for on-demand service expansion to subscribers' mobile phones, tablets and other IP-based viewing devices.

Retrans Round-Up: Yep, it's still going. At deadline, **Hearst** stations remained off **DISH**, while **Raycom** stations in 23 markets were off **AT&T U-verse**. And no one is happy. On Wednesday, Raycom complained that AT&T appears to be using programming disruptions as an opportunity to switch U-verse customers to DirecTV. "Raycom Media offered three extensions through this negotiation process in an effort to continue our negotiations without affecting our viewers on the AT&T U-verse system," **Pat LaPlatney**, Raycom Media pres/CEO, said in a statement. "In the last 3 years, Raycom Media has successfully negotiated retransmission consent agreements with 99.5% of operators without an interruption in service. It's difficult to negotiate an agreement if that is not part of the AT&T U-verse business plan."

Ratings: "Braxton Family Values" returned to **WE tv** Thursday with 1.45mln total viewers in Nielsen L-3 ratings, up double digits from last year's corresponding premiere and 43% from the finale. -- **ESPN's NCAA Wrestling Championships** finals on March 18 delivered 753K viewers (TV + streaming), up 12% from last year's finals. -- **Nielsen** has renewed its local TV ratings agreement with **Fox** for its O&Os in 17 markets, including Charlotte Fox affil **WJZY/WMYT**, which was not part of the previous agreement.

Programming: **Fox Sports** scored the broadcast rights to **BIG3**, the professional 3-on-3, half court basketball league backed by **Ice Cube** launching June 25 in Brooklyn. The first BIG3 show will air June 26 on **FS1** at 8pm

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ET. -- **NASA** turns 60 next year, and **Discovery Channel** is ready. It will bow "NASA: 60 Years and Beyond" in 2018, looking at where the agency is today along with its future. -- **Eleven Sports**, which bought the distribution of **One World Sports**, said it will have live and exclusive coverage of the Emirates Airline Twenty20 cricket tournament. The tourney starts today with the Birmingham Bears and Durham Jets among participating teams. -- "Biography" is back, but it won't just run on **A&E**. **A+E Networks** announced the re-imagined series, which has been off the air for five years, will roll out eps on **A&E**, **History** and **Lifetime** beginning this spring. Initial projects under the banner include *Biggie Smalls*, *Vladimir Putin* and *Elizabeth Smart*. -- **USA** will air a live **Wrestlemania** kickoff show on April 2 at 6pm ET. To watch the big event, filming live from Orlando, fans will need SVOD service **WWE Network** (7pm, April 2). The next night, USA will feature the **WWE Hall of Fame Induction Ceremony** (11pm) following **Monday Night Raw**. -- **History's** working on a new annual scripted TV event, "The Commanders," that dramatizes pivotal moments in US history that defined the men who have served as President. Projects in development under the Commander title include "The Breach: Inside the Impeachment of Bill Clinton" and "Rise of Reagan." -- **NBC Sports Group** and the **Amaury Sport Organisation** have extended their media rights agreement for the **Vuelta a España** cycling race through 2023.

Daytime Emmys: **CBS** leads the Daytime Emmy nominations at 70, but **Amazon** wasn't too far behind with 50 noms. Only syndication had more than the OTT provider and that was just barely with 51 nominations. **Netflix** scored 36 nominations. Among cable nets, **Nick** had the most (18), followed by **HBO** (10), **Food Network** (9), **Disney Channel** (9) and **Disney Jr** (7).

Scripps Upfront: **Food Network** and **Cooking Channel** will introduce nearly 50 new series and specials in 2017, including a project with **YouTube** star *Hannah Hart* on **Food** in August. Food's also gearing up to premiere "Help My Yelp" with restaurant consultant *Monti Carlo* offering an assist to struggling restaurants (April 10 debut). New series at **Cooking** include "Monster Food" (think quarter-ton hamburgers) and "Late Night Eats," both premiering in Q3.

Free Fishing: **World Fishing Network** will be available for a free preview with select cable and satellite providers beginning March 29. **DISH** will offer it on Channel 102 March 29-May 3, while cable affiliates **Grande**, **Century-Link**, **Service Electric Cablevision**, **Blue Ridge Communications** and nearly all the distributors in Canada offering a free preview from April 1-30. WFN is the sister net of **Outdoor Channel** and **Sportsman Channel**.

Adaptive Spirit: **Adaptive Spirit's** 22nd annual event is slated to take place in Vail April 6-9. It will kick off with a panel, in conjunction with the **Rocky Mountain Cable Association**, that will look at where the industry is in implementing digital, broadband and mobile innovations and rolling them out to all consumers. Panelists include **Charter's** *Peter Brown* and *Mark Lasser* along with **AT&T's** *Susan Mazrui* and **Comcast's** *Tom Wlodkowski*. *Suzy Rosen Singleton*, chief of the **FCC's** Disability Rights Office, also will give a keynote at the event.

People: *George Zaralidis* returned to **Crown Media Family Nets** as vp, network program publicity. He is currently part of the team at **ABC** Primetime and Late Night Media Relations leading publicity efforts for "Dancing with the Stars," "Jimmy Kimmel Live," and other ABC series. During a previous stint at Crown, he helped launch **Hallmark Channel's** longest-running scripted series "When the Heart Calls." -- Former Time Warner Cable CFO *Amos Smith* joined **Layer3 TV** as CFO. -- Renowned sports producer and former **Fox Sports** vice chmn *Ed Goren* will serve as an ongoing production consultant to **Tennis Channel**. -- *Christine Rodocker* was upped to vp, distribution and consumer marketing for **INSP**. The news comes as the net redesigns its consumer marketing division to increase promotional impact and overall network awareness.

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Think about that for a minute...

And So It Begins

Commentary by Steve Effros

We all knew it had to start happening, and many of us predicted the trajectory. So none of this should come as any surprise. The question is going to be where is it going to lead.



The numbers tell the story. At the end of 2016 total viewership for various networks, according to Nielsen, took significant hits; Disney - 23%, TNT - 10%, TBS - 12%, History - 11%, and the list goes on. I just picked the "big names" here, the smaller, newer channels were showing major negative numbers as well. Will they survive?

So what's happening? I think the answer is relatively clear; competition has reached the point where program or channel viewership (whether via MVPD, OTT or whatever) is simply going to go down because the pie has become so big it is resulting in a "zero sum" game. The total number of viewing hours isn't increasing, rather, the abundance of choice (there were well over 400 new, "original" productions last year) has resulted in an inevitable diminution of viewership of any given channel or program.

Sure, that's not universally true. The news networks did fine last year because of the elections, but, for instance, our assumption that live sports would be immune to this phenomenon proved not to be true (ESPN - 11%, NFL Network - 22%) and the old saw that children's programming was always going to be a safe bet (Boomerang - 24%) was wrong as well. How about ethnic programming? Well, Univision was - 24%.

Oh, and the argument that "original programming" was going to be the new mainstay? Well, Syfy launched multiple new, original series. - 30%. And that tells a very important story. It's not that Syfy created bad programs. Some of them were pretty good. It's that the targeted, select audience for those programs is getting slimmer and slimmer as more choice is available. The problem here is that without

the "bundle" economics which helps insulate and subsidize multiple channels which can then create that programming, the viewership slide because of abundance may result in a crash that kills that abundance!

How do all those new programs get paid for? How long can the economic model last of companies like Netflix paying billions of dollars a year for new programming and maybe getting one or two viral "hits" out of the dozens of series they create?

Yes, there are new economic models being tried. We now have the traditional bundle, the "skinny bundle," the monthly subscription, the per-program charge and, of course, we have some companies, like Amazon and Google, which rely on totally different models, like data acquisition for targeted advertising offerings on other distribution outlets to pay the bill. But for how long? The traditional advertising model of the broadcast industry is already being challenged (ABC - 8%). How long will it be before the "big data" folks arrive at the same "zero sum" point?

I'm not suggesting that I know the answer to any of this. What I think we have to be concerned about, however, is that the single-minded push for "more" may ultimately lead us to a place where production of diverse programming becomes too costly to pursue. That there will be a contraction, not a limitless expansion of quality expression. I fear that the end result will be that the biggest companies will wind up being the most likely survivors. I don't think that's good for anybody. Yes, an occasional "break-out" program will appear, go viral and get lots of attention, but will that be enough?

Steve

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(Steve Effros was President of CATA for 23 years and is now an advisor and consultant to the cable industry. His views do not necessarily reflect the views of Cablefax.)

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