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What the Industry Reads First

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Better Together: Is Sinclair-Led Sports Venture Greater Than Sum of its Parts?

Round-the-clock cable sports networks like **ESPN** and **FS1** will soon have competition on over-the-air television in the form of a new joint venture spearheaded by **Sinclair Broadcasting Stadium**, which launches Monday as a 24/7 digital offering before making its over-the-air debut Sept 6, combines the reach of the Sinclair-owned channel formerly known as **American Sports Network** with more than 3,000 live events from **Campus Insiders** and a studio programming foundation from **120 Sports**. Once it's up and running, the channel will be available to sports fans for free on TV in 59 markets via digital subchannels (a number that could increase dramatically if Sinclair's merger with **Tribune** goes through); online via **Twitter** and a standalone website; and through apps on virtually every device imaginable. CEO *Jason Coyle* said a number of cable operators will also offer Stadium via retransmission deals, and virtual MVPDs will pay to carry the channel. Specifics on cable carriage are currently unavailable. Coyle acknowledged the unorthodox distribution method will require Stadium to engage in consumer education, particularly for linear viewing. Still, he believes the hodgepodge model give Stadium the potential to achieve "the broadest reach of any linear network in the US." In addition, it offers homes reliant on over-the-air signals for TV service—a number **Nielsen** pegs at about 15 million—something they previously didn't have access to. In terms of live events, Stadium will offer exclusively college sports from mid-major conferences at launch, including the **American Athletic Conference**, **Atlantic 10**, **Mountain West**, **West Coast Conference** and **Conference USA**. Coyle said the net is in talks to add live professional sports rights from leagues outside the "big four." Studio programming will include a daily **NFL**-focused show called "Inside the League," a college sports program called "Campus Insiders" and flagship highlights program "The Rally," which already has a following from 120 Sports' past Twitter streaming deal. 120 Sports—whose stakeholders include **MLBAM**, the **NHL** and **PGA Tour**—will also allow Stadium to offer viewers in-game highlights and live look-ins as part of its studio programming. Once it's up and running, Coyle is confident Stadium will compare favorably to its rivals on cable. "We're going to have a combination of live games, daily live studio offerings, classic games, original programming," Coyle said. "We'll have consistent graphics across the entire programming schedule, so the linear presentation is going to look very familiar to sports fans. When you watch it on

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television, it's going to look like it belongs on television. When you watch it on your iPhone for free, people will be blown away about a sports network that looks, feels and has rights competitive with anything on cable." In addition to an eight-member team of national studio talent based in Chicago, the network will leverage Sinclair's 60-70 sports desks across the country, Campus Insiders' network of more than 100 on-campus reporters, many of whom are embedded with their respective athletic departments, and additional remote correspondents. Coyle plans to use these resources to differentiate Stadium from ESPN and FS1. "When you look at the national landscape of sports, you see a lot of people going to generalists and opinionists," he said. "We think there's still a great place for information and news and analysis by combining a set of national voices with in-market experts." Whether Stadium catches on with sports fans remains to be seen, but it's clear the three entities that make up the network stand a much better chance together than apart.

AT&T-Time Warner Update: The Department of Justice's review of AT&T's pending acquisition of Time Warner has "reached an advanced stage," according to sources cited by the *Wall Street Journal*. Despite the DOJ currently lacking an antitrust chief, the review has reportedly reached the point where AT&T lawyers are in talks with the department about merger conditions. The report comes amid speculation about whether the Trump administration would interfere with approval of the deal, which President Trump himself criticized during last year's election campaign. Time Warner also owns CNN, a common target in Trump's crusade against so-called "fake news."

Cable Dominating Telcos in Broadband: Cable companies ran circles around their telco rivals in the broadband market last quarter, according to new data from **Leichtman Research Group**. The firm looked at the fourteen largest cable and telephone providers in the US, which combined account for about 95% of the broadband market. Combined, the group netted about 230K new high-speed Internet subs in 2Q. The contrast between cable and telco, however, is stark. The seven cable companies in the group combined for a net gain of about 462K subs (includes an estimate for privately held Cox), led by Charter's addition of 267K and Comcast's 175K. On the other hand, all seven of the top telco companies saw net losses, combining for 233K lost broadband subs. Frontier led the most, dropping 101K in the quarter, while CenturyLink lost 77K. As of the end of 2Q, the top seven cable companies combined for a total of 59.9mln broadband subs, compared to the telcos' 34.2mln. That's a 64% to 34% split in favor of the cable companies, marking cable's largest share since the first quarter of 2004. The 230K new Internet subs in 2Q were about 107% of those in the same period last year. The 2.6mln subscriber adds over the past year, however, is down from 3mln over the prior year.

Complex Fusion: Fuse Media and Complex Networks announced a new content and advertising partnership, with each bringing exclusive programming to the other network. Complex will place its short form digital series on Fuse's cable network as a 90-minute programming block, including first-run segments of more than 20 of its weekly digital shows. Fuse will develop original short form content, along with productions related to its network series, to be distributed on Complex's digital platforms, allowing the entertainment media brand more access to the online community. Both networks will advertise with the other, giving each brand access to new audiences and growth opportunities.

Team Players: Telemundo Deportes picked NBC Sports' Playmaker Media to power its streaming coverage of the next year's FIFA World Cup. Telemundo Deportes has exclusive Spanish-language rights in the US for the tournament. Other Playmaker clients include the IOC, NASCAR and USA Swimming.

Programming: Investigation Discovery's "Homicide Hunter: Lt. Joe Kenda" is returning for a seventh season. The storytelling series focusing on the career and closed cases of a retired homicide is set to premiere Aug 23 at 9pm ET. -- TruTV renewed scripted half-hour comedy "I'm Sorry" for a second season in 2018. "I'm Sorry" follows a comedy writer, wife and mom played by show creator Andrea Savage.

People: SeaChange International named William Markey chmn of the Board in response to Steven Craddock's retirement. The company also appointed two new directors—media strategist Andy Sriubas and tech and finance veteran Mark Bonney—"in response to shareholder feedback." Sriubas has been an advisor to the board since 2016, chairing the Advisory Board working on strategy and technology matters.