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What the Industry Reads First

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Perfect Trio: WarnerMedia To Launch Three-Tiered SVOD Service

After plenty of waiting, there are finally answers as to what's coming from WarnerMedia and its DTC plans, thanks to AT&T's Investor Day presentation Thursday. AT&T CEO *Randall Stephenson* opened the presentation, speaking to the nearly 600 days spent waiting to get the green light to move ahead with the AT&T-Time Warner merger. "That caused us to put on hold a lot of our plans," Stephenson said following a sizzle reel. "We're now in a place where we're ready and we want to share those plans with you." For WarnerMedia, there's not really just one plan. It's more like three-in-one. WarnerMedia CEO *John Stankey* revealed that the initial SVOD beta application to come from the company will include three tiers. Stankey believes that this structure is possible due to the resources now available post-merger, and will expand the customer base of the service while reducing churn. "We not only have the toolset that's necessary from an infrastructure and technical perspective, but we have the creative opportunity to bring great content onto these platforms," Stankey said. "That's the shift that we're now talking about." The first tier will be an entry-level movie-focused package. The second will act as a more premium service with original programming as well as some blockbuster movies. The third service will bundle together content from the first two tiers while also building out an extensive library of content from WarnerMedia as well as third-party partners. While expanding the audience and increasing the engagement around content offered on the service, the SVOD service is meant to benefit WarnerMedia's current distribution partners through AT&T's advertising division, **Xandr**. AT&T hopes the SVOD service will be able to provide data and analytics that inform new products and offer insights on how to better monetize content. Right now, AT&T and WarnerMedia aren't rushing to bring the product to market. It will continue to be developed through the first half of 2019 with a beta coming in the fourth quarter. The company revealed no pricing or exactly where **HBO** and other properties fit into it all, but Stankey affirmed that finding the proper mix is of paramount concern. "Our goal here is to build a reason for more customers to be involved with us across a variety of different demographics and have genres and brands that attract people," Stankey said. "We understand that this product has to be good enough to be part of the essential consumer set that somebody thinks about when they spend that \$150/month."

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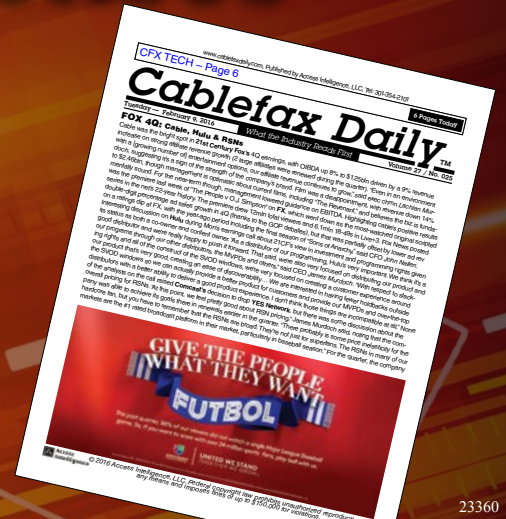
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Up to Bat: It seems that another player has entered the race for the **Fox RSNs**. While being honored at the 35th Annual March of Dimes Sports Luncheon Tuesday, **MLB** commissioner *Robert Manfred Jr* told *JohnWallStreet* that he wasn't just watching the RSN process unfold. "We're very interested in the RSN sale process and have preferences in terms of who the owners are going to be," Manfred said. "Candidly, we're looking at the RSNs ourselves." MLB would be entering a crowded field, bidding against **Amazon**, **Sinclair** and others, but should it succeed, it would have the potential to gain the streaming rights to all of its own games.

Nielsen Ads: **Nielsen** is expanding its US Dynamic Ad Insertion (DAI) pilot by adding the **MediaTek**-powered Smart TV platform. MediaTek currently powers more than 50% of Smart TVs, and will bring advanced DAI to the platform for the first time. The DAI pilot will allow MediaTek to deliver addressable advertising capabilities in live trials across five major US markets. **A+E Networks** will also be joining **CBS** to begin replacing ads in live linear programming on select nets. CBS and A+E will be the first broadcasters to dynamically replace traditional linear ads.

Web Surfing: Concerns surrounding consumer privacy and security didn't stop those interested in tech from jumping online. From Thanksgiving Day through Cyber Monday, this was the first year that more tech shoppers bought or planned to buy online (59%) than at a brick-and-mortar location (58%), according to a new study from the **Consumer Technology Association**. This is also the second year running that the number of American adults who shopped or planned to shop on Cyber Monday (54%) beat out those planning to do the same on Black Friday (48%). Desktop or laptop computers were the most common device used (55%) followed closely by mobile devices (45%). The top five tech products purchased were TVs, game consoles, tablets, smartphones and digital media streaming devices.

Going Live: A day after coming to **Sling TV**, five **Discovery** nets have launched across all **Hulu with Live TV** packages. Those subscribing to the Hulu with Live TV Core Package will find Discovery Channel, **TLC**, **Motor-trend**, **Animal Planet** and **ID** added to their lineup. The Entertainment tier will gain **Destination America**, **Discovery Family**, **Science**, **Discovery Life** and **AHC**. The Español tier now includes **Discovery en Español** and **Discovery Familia**.

Carrying Again: **Tribune Broadcasting** and **Altice USA** announced Thursday they had reached an agreement on carriage and retransmission consent. Altice will continue to carry Tribune's local stations across the country and will also carry Tribune's **WGN America**. The specific terms of the deal remain under wraps.

CFX WHERE WE'LL BE IN 2019

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WHERE WE'LL BE

- 1/8/19 CES in Vegas (Jan. 8 - 11)
- 1/22/19 NAPTE in Miami (Jan. 22 - 24)
- 1/28/19 ReelScreen Summit in New Orleans (Jan. 28 - 31)
- 1/29/19 TCA in Los Angeles (Jan. 29 - Feb. 13)
- 2/25/19 NCTC Winter Conference in Atlanta (Feb. 25 - 26)
- 3/8/19 SXSW Interactive in Austin (March 8-12)
- 3/19/19 CFX Roundtable at ACA
- 3/19/19 ACA Summit in DC (March 19-21)

On the Up and Up: Viewing on ad-supported OTT platforms continues to rise, with 90% of adults 25-34 who stream video saying they do so on those services. According to the latest insights from the **VAB**, 67% of households now have access to an internet-enabled TV-connected device, a 10% boost from 2017. OTT-only homes now make up 10% of video households, growing 15% over the last two years. This growth is providing opportunities for marketers, with most digital ad views coming within OTT and being double that of smartphones (41% vs 19%). VAB noted that viewing an ad on both linear TV and OTT platforms leads to a twofold increase in brand favorability lift.

5.9GHz Ready: NCTA is pushing the **FCC** to move forward with opening the 5.9 GHz band to unlicensed operations, declaring testing of WiFi devices in the space a success. The association has long advocated for the FCC to make a move in the space. Now, it has the added ammunition of a report issued last month by the agency's Office of Engineering & Technology that found devices avoided harmful interference with dedicated short-range communications devices in adjacent channels. "Regardless of whether the 5.9 GHz band is ultimately the right home for automotive-safety operations, this key finding supports any effort by the Commission to propose a band segmentation approach that would designate a portion of the band for Wi-Fi and a portion for DSRC or future Intelligent Transportation Systems (ITS) technologies," NCTA said in comments submitted this week.

Holiday Spirit: Vyve Broadband kicked off its Vyve Cares Program over Thanksgiving, hosting food drives that resulted in nearly 3K non-perishable food items being donated to 15 food banks in 15 different communities. Through the holiday season, Vyve will host its annual Christmas Card Art Contest, allowing children to submit works of art to be used as the cover on the company's Christmas card. The child wins an iPad Mini, a cookies and cocoa party for their school and a \$200 donation to their school for art supplies.

Finding a Cure: ESPN is holding its 12th annual "V Week for Cancer Research" in support of the **V Foundation**. The week will include three initiatives, starting with Kicks to Beat Cancer (Nov 26-Dec 6). ESPN commentators and professional athletes will donate signed pairs of shoes to be auctioned off. *Craig Sager* Style Day (Nov 29-30) will see ESPN, **NBA** on **TNT** and **NBA TV** commentators wearing jackets and clothing reflecting the reporter's signature style. Two of Sager's game-worn jackets will also be auctioned off. The **WeRateDogs** h*ck cancer campaign (Nov 27-Dec 8) will highlight dogs who are currently fighting cancer. WeRateDogs created custom merchandise with the slogan and will donate all net proceeds from the sales to the V Foundation. All proceeds raised from the initiatives will go directly to cancer research and related programs. In its 11-year history, V Week has raised more than \$22.2mIn.

Giving Back: **Discovery** is partnering up with jewelry company **HOWL** to raise funding for Project CAT. HOWL will feature and sell a wild cat pendant (\$250-300 each) and ring (\$180-220 each) in honor of wild cats around the world. For each ring and pendant sold, HOWL will donate \$50 to Project CAT, which aims to double the wild tiger population by 2022. Money raised will also benefit World Wildlife Fund, which has partnered with Project CAT since 2016.

Ratings: **Sundance TV's** "Jonestown: Terror in the Jungle" two-night programming event on Nov 17-18 brought in 527K total viewers in L+3 ratings for the first installment. The audience grew for the second installment to 529K.

Programming: **Nat Geo** greenlit "The Bible From Space" (wt), a two-part doc special diving into the truth behind stories from the Old Testament. The net will use tech including satellite imagery in the Middle East. -- **Flyers** fans can rejoice, as **NBC Sports Gold's** "Philly Pass" now includes the ice hockey team's content. -- **Disney Junior** started production on "Mira, Royal Detective," an animated mystery-adventure series debuting in 2020. -- **Adult Swim**, **Crunchyroll** and **Alcon Television Group** teamed up to produce "Blade Runner - Black Lotus," an anime series inspired by the film "Blade Runner 2049." -- **Fox Sports** and the **New York Association (NYRA)** partnered in a long-term programming deal that will make Fox Sports the home for NYRA racing, including Saratoga Race Course and Belmont Park. In 2019 the net is now scheduled to televise 500 hours of horse racing, and will expand to over 600 hours annually in 2020. -- **Comedy Central** ordered eight episodes of "Robbie," a scripted series starring *Rory Scovel* ("I Feel Pretty") as a youth league basketball coach living in his father's shadow. -- *DeRon Jenkins* and *Page Turner* are returning to the home renovation scene with the second season of **HGTV's** "Flip or Flop Nashville" premiering Jan 3 at 9pm.

People: **XFL**, the revived American football league, tapped *Scott Parker* as svp, marketing & communications. Parker comes over from **Tuneln**, where he developed the marketing and communications department.

PROGRAMMER'S PAGE


A Dirty Shame...

When it comes to crime podcast spin-off TV series “Dirty John,” which premiered last week on **Bravo**, executive producer *Richard Suckle* perhaps said it best at the recent premiere in LA. “It’s easy to forget when you’re watching something for entertainment that the events actually happened,” he said. “But in the case of Dirty John, they actually did.” Unfortunately. The first episode of this scripted thriller stays pretty true to the real-life genesis of how scammer *John Meehan (Eric Bana)* wooed a 4-time divorcee in Southern California, manipulating her into marriage within weeks. The signs are all there. But she can’t see them. And even with her savvy kids warning her that something’s not right, John’s charms take a hold of her in ways that are equally understandable and frustrating for the audience. The first episode will have many viewers throwing objects at the screen wondering how successful businesswoman *Debra Newell (Connie Britton)* could ignore so many red flags. Executive Producer *Jeffrey Reiner*, who also directed all 8 episodes, says Britton’s involvement “was like the pollen. I was attracted to doing it.” And to be sure, Reiner and the show’s writers create a tapestry of deceit that’s perhaps best illustrated by a seemingly unrelated 3-scene subplot in the first episode in which Meehan—then a nurse at a local hospital—tells a cancer-stricken woman that he’ll take away her pain with medication only to sadistically withhold it from her until she’s moaning in agony. It’s a fitting analogy for what he’s doing to Newell, telling her he’ll take away her relationship pain while proceeding to make it worse. Perhaps the ultimate lesson of this creepy series is that love is blind. And that’s why it’s so perilous to navigate when evil forces are afoot. – *Michael Grebb*

Reviews: “Escape at Dannemora,” 10pm, Sunday, **Showtime**. Often it’s easy enough to join a television series several episodes, or even seasons, in. It’s not too difficult to figure out the story. These days, though, we find ourselves urging viewers to start with episode one. As such, the limited series “Escape at Dannemora” is best experienced in full (this week’s is number three in the seven-part limited series). In this case it’s the quality of director *Ben Stiller’s* material that recommends seeing the initial eps. The plotline is basic; it recounts the story of two inmates who attempted escape from a NY state prison in 2015. While Stiller might not have needed seven eps to tell this story, his direction and the performances of *Patricia Arquette* and *Paul Dano*, and to a lesser extent *Benicio del Toro*, are well worth the investment. -- “Inside Syria’s Deadly Dynasty,” 9pm, Sunday, **Nat Geo**. This is another fine entry from Nat Geo’s inside look at dictatorships, which began earlier this month with a great two-night of N. Korea. The 90-minute Syria program takes a similar approach, looking at the family behind the Assad dictatorship. While a detailed look at President *Bashar al-Assad’s* father, *Hafez*, is lacking, the insight and interviews with Bashar, the former eye doctor, and his British-born wife are excellent. – *Seth Arenstein*

Basic Cable P2+ Prime Rankings* (11/19/18-11/25/18)		
Mon-Sun	MC US	MC US AA
	AA%	(000)
FNC	1.065	3,254
ESPN	1.056	3,225
MSNBC	0.783	2,392
HALL	0.624	1,906
CNN	0.544	1,663
USA	0.387	1,183
HGTV	0.357	1,089
TBSC	0.340	1,037
ID	0.321	980
A&E	0.316	967
HMM	0.299	912
FOOD	0.289	883
AMC	0.284	867
DISC	0.270	826
HIST	0.268	819
ADSM	0.247	754
TNT	0.246	752
TLC	0.241	737
NICK	0.220	671
BRAVO	0.217	662
FRFM	0.211	643
TVLAND	0.205	626
FX	0.201	612
NAN	0.193	590
CRN	0.190	581
DSNY	0.174	533
NFL	0.171	523
DSJR	0.169	518
INSP	0.156	477
VH1	0.155	473
MTV	0.148	452
LIFE	0.142	434
NKJR	0.134	410
OWN	0.129	394
TRAVEL	0.127	387
SYFY	0.124	380
GSN	0.123	376
PARA	0.119	363
APL	0.116	355
COM	0.114	348
LMN	0.113	345

*P2+ L+SD rankers are based on national Nielsen numbers, not coverage.



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