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*Chief Investment Officer,
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Marianne Gambelli
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5 LEAD-IN

FEATURES

8 COVER STORY

The streaming wars have become more than just a battle for viewers, as the big players set their SVOD advertising strategies.

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Queen Latifah in *The Equalizer*, airing on CBS and on Paramount Plus.

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FUTURE

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Sinclair, Streamers Still At Impasse Over RSNs

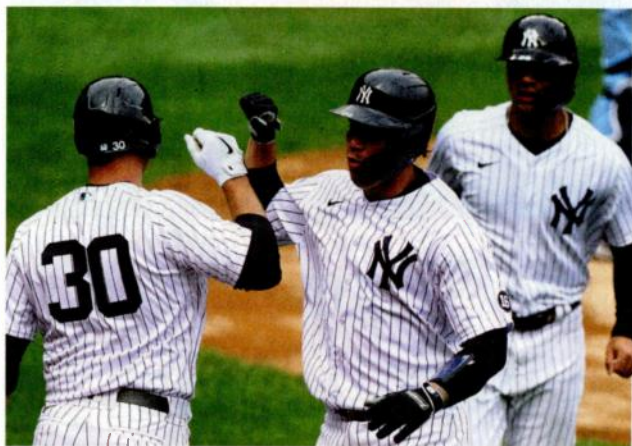
Bally Sports networks seek deals as baseball heads into week two



By Mike Farrell
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Moving into the second week of Major League Baseball's 2021 regular season, Bally Sports Networks still hasn't reached a carriage deal with three top streaming services.

YouTube TV, Hulu Live Plus TV and FuboTV still refuse to carry the channels, which were purchased by Sinclair Broadcast Group in 2019. The former Fox Sports channels were rebranded as Bally Sports Networks on March 31, part of the 10-year, \$88 million agreement between Sinclair and the casino owner.



While the streamers have been without the networks for months — Hulu and FuboTV dropped the 21 channels in January 2020, with YouTube TV shedding the networks in October — the hope was

Baseball season got underway with key networks still unavailable to some vMVPD subscribers.

that they could reach a deal by Opening Day, April 1.

That was not to be. As of press time, the channels were still dark to the streamers. FuboTV did reach an agreement with Marquee Sports Network, in which Sinclair has a minority interest, on April 1.

Rob Weisbord, president of broadcast and chief revenue officer at Sinclair, told B+C/Multichannel News on April 1 Sinclair's distribution team is in talks with MVPDs "trying to figure out how to get to a deal."

Bally Sports has carriage deals with most of the traditional MVPDs across the country, except for RSN-averse Dish Network, which dropped the channels in 2019. But the lack of carriage from the streaming services, which have more younger viewers coveted by advertisers, has cast a pall on the channels.

Sports consultant Lee Berke, president and CEO of LHB Media & Entertainment, said it is possible the streamers are "trying to see if they can get by without the RSNs," but added that the standoff highlights the growing need for RSNs to have a direct-to-consumer component to their offerings. ●

Jon Lafayette contributed to this report.

ADVERTISERS SEE SPENDING SHIFT TO STREAMING

Advertiser Perceptions study finds streaming budgets up 15%

WITH TRADITIONAL LINEAR TV viewing down, 42% of advertisers plan to increase spending on streaming, according to a study by Advertiser Perceptions.

Top executives will discuss over-the-top video, addressability and advanced targeting at the Advanced Advertising Summit, starting April 27 and part of the Future Spring TV 2021 week of virtual events.

The average increase in spending on streaming was 15%, according to the study, which found that 36% of advertisers plan to invest more in virtual MVPDs and 25% will spend more on

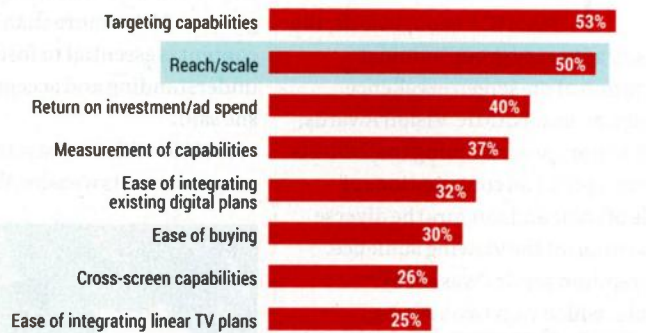
addressable linear TV. Just 19% are expected to spend more on linear TV.

"One of the most important narratives of 2020 was the mass adoption of streaming," Justin Fromm, executive VP of business intelligence at Advertiser Perceptions, said. "The more traditional TV brands expand in the streaming space, the more advertisers pick up on the signal."

Advertiser Perceptions found that 48% of advertisers are buying OTT and connected TV programmatically. The top benefits of buying programmatic OTT and CTV were the ability to target and add reach to campaigns.

REACH IS A TOP PRIORITY IN PROGRAMMATIC CTV

Top criteria for selecting a DSP for CTV/OTT advertising (Rank 1-3)



"Reach is the primary headwind for those selling CTV/OTT inventory," said Fromm. "While addressable campaigns are efficient, most brands have a hard time finding

enough of their target audience in one place." — Jon Lafayette

For a rundown of the Spring TV 2021 events, see pages 12-17.



HBO, 'Insecure' Tops At NAMIC Vision Awards

CNN, Lifetime among network multiple winners



By R. Thomas Umstead
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HBO, led by its comedy series *Insecure*, outperformed all programmers in wins at the 27th annual NAMIC Vision Awards, the diversity advocacy group's annual recognition of on-screen excellence.

HBO won four NAMIC Vision Awards, which honors programming that reflects the lives, spirit and contributions of people of color and mirrors the diverse composition of the viewing audience. The premium service was led by *Insecure*, which won two awards, including best comedy series and best performance in a comedy series for series star Issa Rae.

HBO's horror-themed series *Lovecraft Country* also took home best drama honors, while the LeBron James-produced series *The Shop: Uninterrupted* was the top choice in the sports category.

Lifetime picked up two awards for its original movie *The Clark Sisters: First Ladies of Gospel* and CNN also won multiple Vision Awards.

NAMIC president and CEO A. Shuanise Washington recently spoke of the importance of recognizing quality, diverse and inclusive content during the NAMIC Vision Awards nominations process. "Now more than ever, this content is essential to fostering greater understanding and acceptance," she said.

NAMIC will showcase the winning programs on its website, namic.com. ●

Among the NAMIC Vision Award winners: HBO's *Insecure* (above), starring Yvonne Orji and Issa Rae, and *CNN Heroes*.



NAMIC Vision Awards winners

Animation

Doc McStuffins – Disney Junior

Awards & Honors

CNN Heroes: An All-Star Tribute – CNN

Best Performance – Comedy

Issa Rae, *Insecure* – HBO

Best Performance – Drama

Aunjanue Ellis, *The Clark Sisters: First Ladies of Gospel* – Lifetime

Children's

Coming Together: Standing Up to Racism (CNN & Sesame Street) – CNN

Comedy

Insecure – HBO

Digital Media – Short Form

Movements That Transformed Our World: The March Continues – NBC News Digital

Documentary

Blackfeet Boxing: Not Invisible – ESPN

Drama

Lovecraft Country – HBO

Foreign Language

En la Línea: Latinoamérica – Discovery Networks Latin America/U.S. Hispanic

Lifestyle

Turkey Day Sunny's Way – Food Network

News/Informational (tie)

NBC News Primetime Special: America in Crisis – NBC News
VICE News Tonight: Underlying Conditions: Coronavirus Devastates Navajo Nation – VICE Media Group

Original Movie or Special

The Clark Sisters: First Ladies of Gospel – Lifetime

Reality

Made from Scratch – Fuse

Reality – Social Issues

United Shades of America With W. Kamau Bell – CNN

Sports

The Shop: Uninterrupted – HBO

Variety/Talk Show

HA Festival: The Art of Comedy – HBO Max

WATCH THIS ...



The seventh and final season of *Younger* begins on Paramount Plus April 15. The Darren Star series stars Sutton Foster. The first six seasons were on TV Land, which gets season seven later this year. 📺 Sticking with the final season theme, season five of *Van Helsing* is on Syfy April 16. Vanessa, Violet and Jack risk everything to finally bring an end to the Dark One. 📺 On April 18, *Couples Therapy* is on Showtime. The docuseries follows therapy sessions with Dr. Guralnik as she guides couples through honest confrontation. 📺 A



A new season of *American Dad!* is on TBS April 19. Worried he's not smart enough for Hayley, Jeff undergoes an experimental intelligence enhancement procedure at the CIA. 📺 *Mystery Cruel Summer* gets going April 20 on Freeform. Jessica Biel is behind the series, which follows two young women: a popular girl who goes missing, and a nerdy one accused of being connected to the disappearance.



THE WATCHMAN

Senior content producer Michael Malone's look at the programming scene



By Michael Malone
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Nothing But Net for Stamos Series

Big Shot, with John Stamos as Marvyn Korn, a hotshot college hoops coach who ends up coaching a girls high school team, premieres on Disney Plus April 16 (see Review, page 19). Stamos said he was pumped to play a bit of a jerk. "It was the first character that I've been offered that everybody is talking about him like how unlikable he is and what a crab he is," he said during the TCA Press Tour. "So I dug into that."

ABC bought the show years ago, but it never got made. Fittingly enough, *Big Shot* is about second chances, said executive producer/showrunner Dean Lorey. "Marvyn was a guy who was enormously successful in college ball and saw players as X's and O's," he said. "We wanted to put him in a situation where, in order to be successful, he was going to have to start getting personally involved in the lives of the players."

'Mare' Finds Kate In Keystone State

Mare of Easttown, a drama with Kate Winslet as a detective in a small Pennsylvania town investigating a murder and sorting out her own life, begins on HBO April 18. It's "an exploration

into the dark side of a close community," HBO says.

Brad Ingelsby, creator and executive producer, said *Easttown* is an amalgam of various Philly exurbs working through various problems. "It's a working-class community, a community that is dedicated to each other," he said.

It's also a community where the people who grew up there don't typically leave, he added. "There's a lot of shared history," Ingelsby said. "That is what the show is speaking to."

Early on, someone had suggested Winslet to play Mare. Ingelsby's reaction? "Yeah, right," he said. "Never in our wildest dreams."

Winslet signed up. "She was looking to do something different, take on a part she never played before," Ingelsby said. "She was looking to take on a role that is nothing like her."

For her part, Winslet had other motivations to get on board with *Mare*. "Wawa was a big part of my life for well over a year," she said during the TCA Press Tour of shooting in Pennsylvania.

Ingelsby called it "a game-changer" when your series picks up a Kate Winslet.

He said *Mare of Easttown* was shaped during what he called a dark time, in 2018. "It's a show that I wanted to speak to mercy and compassion and empathy, things I felt you were not seeing a lot of in the country," Ingelsby said.

He mentioned more optimism around these days: "We're out of a dark time, in a way, but the themes of the show still resonate." ●



IT'S UPFRONT PLUS AS MORE COMMERCIALS COME TO SVOD

Ad dollars will flow to streaming, but are there enough eyeballs available for sale?



By Jon Lafayette
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Netflix doesn't have commercials. Subscribers have always liked that and made Netflix the No. 1 streaming service. HBO never had ads. It's not TV, it's HBO, after all. Or at least it wasn't.

In June, AT&T's WarnerMedia unit will launch a version of the subscription video-on-demand service HBO Max that will have commercials. Around the same time, ViacomCBS will be launching an ad-supported tier of its Paramount Plus SVOD service. Those follow on the heels of launches of the Discovery Plus SVOD offering in January and Comcast's Peacock last year, both of which give subscribers the option to watch commercials or pay more and avoid them.

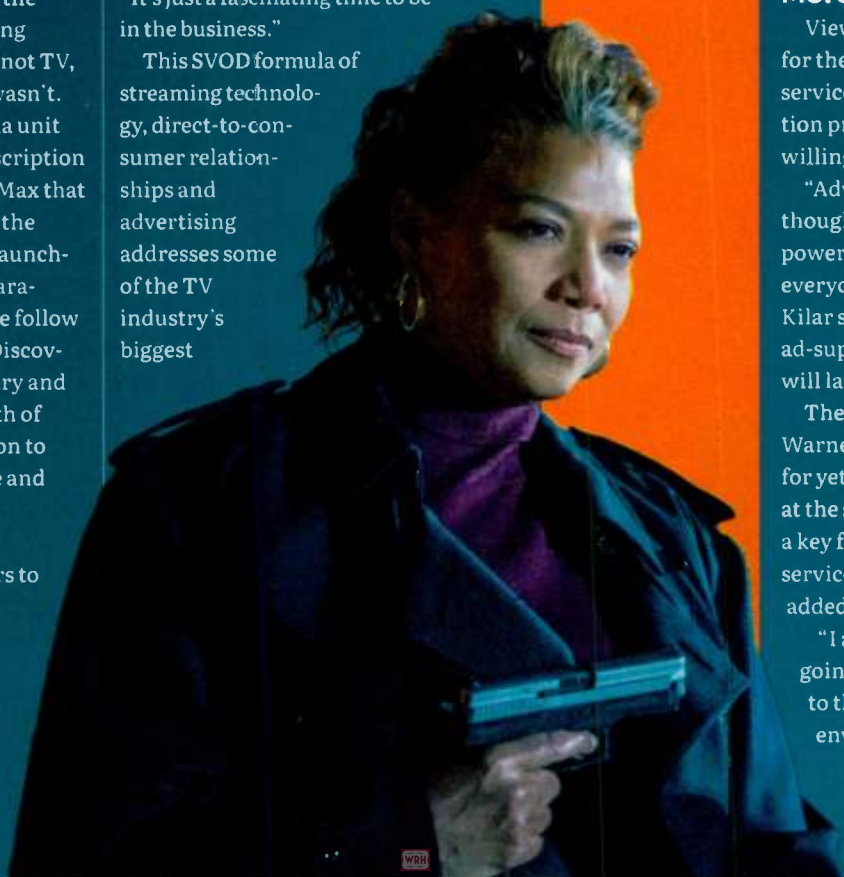
Those media companies will be spending big to get consumers to sign up — maybe you saw their Super Bowl ads — and pushing hard to get advertisers to sign on during the upcoming upfront.

Dawn of a New Era?

"This year is going to be the year," Geoffrey Calabrese, chief investment officer for Omnicom Media Group, said. "This upfront is going to really set up the future of everything. You're going to see a pretty substantial shift" in ad dollars moving from linear TV to streaming. "It's just a fascinating time to be in the business."

This SVOD formula of streaming technology, direct-to-consumer relationships and advertising addresses some of the TV industry's biggest

CBS show *The Equalizer* will also have its episodes streamed over Paramount Plus.



recent problems. Over-the-top programmers such as Netflix or Amazon Prime Video (which don't run ads) have been driving consumers to cut the cord, depriving networks of subscriber revenue and reducing the number of eyeballs they have to sell to advertisers. And as audiences get smaller, it is harder for marketers to reach consumers and commercials get more expensive on a cost-per-consumer basis.

"Traditional linear TV is experiencing such a significant decline in viewership that available inventory is falling in a pretty meaningful way," said Erian Wieser, global president, business intelligence at agency GroupM. "You've got some problems if you're an advertiser."

But adding commercials might not be an easy fix for media companies. Netflix, Amazon, Apple TV Plus and Disney Plus are likely to remain commercial-free. "If the dominant players have no ads, it's going to be hard to be competitive if you have more than a light ad load," Wieser said.

More Ads, Lower Prices

Viewers also have a problem paying for the growing number of streaming services that are springing up. Subscription prices can be lower — if a viewer is willing to watch commercials.

"Advertising, when executed thoughtfully and elegantly, is a powerful way to lower prices for everyone," WarnerMedia CEO Jason Kilar said in laying out plans for an ad-supported version of HBO Max that will launch in June.

The ad-supported version (which WarnerMedia hasn't disclosed pricing for yet) won't offer Warner Bros. movies at the same time as they are in theaters, a key feature of the premium SVOD service, and it won't have commercials added to HBO original shows.

"I also believe that marketers are going to be delighted, thanks in part to the safe, addressable, premium environment unlike any service out

here," Kilar said. "The pre-launch response from marketers certainly suggests that they agree with these statements, given that we already have \$80 million in upfront commitments."

Kilar knows a bit about streaming services and ads from the days when he launched Hulu. Hulu, which is now controlled by The Walt Disney Co., has an ad-free version and its ad-supported version is the leader and model in the connected-TV space with its targeting capabilities and innovative ad formats. Hulu has said in the past that about 70% of subscribers to the SVOD service choose the lower-cost version that has ads.

Hulu and the other streaming services will be a massive part of this year's upfront pitches — although some question how much inventory they'll have to sell.

"They will 100% be a part of the upfront conversation and a larger part of that conversation each year from here on out," David Campanelli, chief investment officer at Horizon Media, said.

"I would say it's their No. 1 priority," Omnicom's Calabrese said. "It's going to be a big push in the upfront, absolutely."

The ad-supported versions of HBO Max and the rest could be a solution to the loss of reach that TV networks and their sponsors have been experiencing. It's been hard to get firm numbers of subscribers to some



Parsing how SVOD will reshape TV advertising (from top): Brian Wieser, GroupM; Jason Kilar, WarnerMedia; and Laura Molen, NBCUniversal. Shows on offer will include HBO Max's *The Flight Attendant* (top r.), Paramount Plus's *Younger* and Discovery Plus's *The Impossible Row*.



services from salespeople, but Calabrese expects to get good data once campaigns start to run.

HBO Max is promising a maximum of four minutes per hour of ads, Calabrese said, and is offering premium content, unique ad experiences and a safe environment when parts of the streaming world can be like the Wild West.

Paramount Plus and the others are making the same sort of pitch. "There are different flavors, but there is a lot of similarity," Calabrese said. "I think a lot of people are drafting off the success that Hulu's having in the space."

Hulu is The Walt Disney Co.'s ad-supported entertainment SVOD, paired with ad-free Disney Plus.

"All of the streamers have really done a nice job of presenting what their capabilities are and what we can expect," Calabrese said. "The more they build scale and the more sophisticated their addressability gets, the more effective they're going to be."

The streamers also expect advertisers to pay top dollar for the lack of clutter, precise targeting and better data about campaign performance. "That's my job, to make sure it's not a premium price," Calabrese said.

Much of this new streaming video will be sold programmatically. So far,

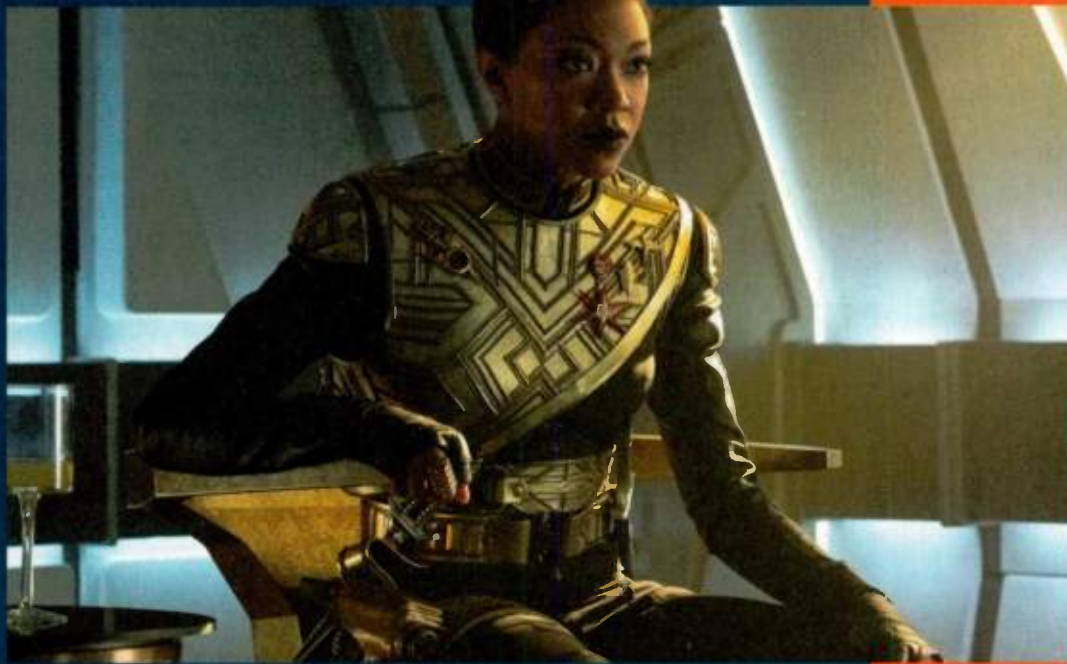


some streamers are getting prices equivalent to those seen in the upfront and scatter market, said Scott Schiller, chief revenue officer of Engine, a global, full-service media and marketing services company.

"It's better for the marketer that they will eventually be able to target very specific audiences in the genres they want," Schiller said. But, as when cable was new, the streaming services are getting 40% of the audience but only 5% of media spend.

Comcast's NBC Universal unit introduced Peacock last year with a free, ad-supported tier; a premium tier (\$4.99) that has more content, including sports programming; and an ad-free





option for \$9.99.

"We created Peacock with the marketer and the consumer at the heart of what we're doing," Laura Molen, president of advertising sales and partnerships at NBCU, said. "It's the best of premium content combined with our technical prowess."

Peacock launched with a group of sponsors, each of which was promised a share of Peacock's audience. They included State Farm, Target and Unilever.

Molen said that 77% of Peacock viewers said they liked the low amount of ads on Peacock, a 10% higher score than other streaming services, and 76% said Peacock did a good job showing them a variety of ads, rather than the same ones over and over.

But NBCU hasn't disclosed how many people are choosing the ad-supported version of Peacock and which version generates more revenue. Peacock also has sports content.

Ads on Peacock can be unique. State Farm worked with the creators of *The Office* on a spot that showed someone throwing a stapler through a window and invited viewers to send "Jake from State Farm" their own funny home-office stories.

But for 2020, Peacock generated just \$118 million in revenue and lost \$914 million, according to a Comcast financial filing.

More recently, NBCU opened Peacock ad sales to additional clients. And last month, it said inventory on Peacock would be sold programmatically and included in NBCU's cross-platform planning systems.

"We're in the market now talking to advertisers about Peacock in the upfront and we've been really getting great feedback, great interest in Peacock," Molen said.

NBCU's last official announcement was that Peacock had generated 35



Clients and agencies know they have to move a significant amount of investment to streaming video.

— **David Lawenda**, executive VP, digital sales and strategy, ViacomCBS



ViacomCBS's David Lawenda will pitch ViacomCBS IQ, a consolidated digital content offering providing inventory on shows such as *Star Trek: Discovery* (above).

million signups. Molen said Peacock has been growing and that it's pacing to have the same kind of mass reach for key demographic groups such as adults 18-49 as broadcast prime — and is being priced that way.

"Peacock is really the most premium of all things that we have right now," she said. "It's really up there in terms of prime, Olympics, NFL, our most premium products."

ViacomCBS had launch partners for Paramount Plus when the streaming service debuted in March, even though the ad-supported version won't be here until June. Those sponsors included heavyweights like General Motors, Procter & Gamble and Expedia. A co-branded spot promoted GM's electric vehicles.

Those sponsorship deals end in June and ViacomCBS is looking to renew those and get new advertisers to sign up, said David Lawenda, executive VP, digital sales and strategy at ViacomCBS. There are active conversations and some advertisers have already signed up for the second half of 2021, Lawenda said.

ViacomCBS's High IQ Play

Paramount Plus is being sold in scatter and in the upcoming upfront auction as the anchor product of ViacomCBS IQ, the company's consolidated digital content advertising offering. IQ's video inventory provides massive reach with 60 million full-episode viewers per month, with 80% of viewing taking place on TV screens. And 45% of that reach is incremental to linear TV, Lawenda said, because many IQ and Paramount Plus viewers are cord-cutters and cord-nevers.

IQ Video can be bought based on traditional age and gender demos or on advanced target segments. Inventory can be bought directly, via programmatic guarantee or through a private marketplace. "We're giving advertisers a lot of choice here," he said.

IQ Video also has "content pillars"

that match up with linear programming, such as primetime replacement, with inventory in the most-premium shows including the Paramount Plus originals. There are pillars that mirror the company's cable programming and sports.

"Clients and agencies know they have to move a significant amount of investment to streaming video," Lawenda said. "Otherwise they're going to be facing significant year-over-year rates of change [in price]. You don't get any closer to television than ViacomCBS IQ."

In the upfront, IQ will be a big part of the conversation at ViacomCBS, along with broadcast and cable. "Any ratings point that we're losing in broadcast and cable can be made up through IQ and we've made it easy for clients to transact."

If clients want to buy a full rotation of digital inventory and don't insist on particular programs, networks or dayparts, "we can make that very efficient, more efficient than broadcast." But if a client wants just IQ Prime, the price is comparable to broadcast prime, he said.

Discovery Plus was launched in January in two versions, one without ads for \$6.99 a month and one with ads for \$4.99. The ads sold out in the first quarter, said Jon Steinlauf, president of ad revenue at Discovery. "We're running at full capacity," he said.

Discovery shows are produced with four breaks per hour. On Discovery Plus, each of those breaks is one-minute long, with a countdown clock to let viewers know when the show will return.

Some of the ads were sold in the upfront market, even though a firm launch date wasn't announced until December. Some sold in scatter.

Programmatic sales are taking Discovery Plus to sellout, the company said.



Peacock will lure advertisers to the *Punky Brewster* reboot (top) and classic *The Office* (bottom). Above, Discovery's Jon Steinlauf says the ad-backed Discovery Plus is at "full capacity."

Impressions sold through demand-side platforms have gone for higher cost per thousand (CPM) rates with more targeting, Steinlauf said. Those advertisers are likely looking at the cost per incremental reach point.

Streaming is changing the way Steinlauf, a longtime sales executive for Scripps Networks such as HGTV and Food Network and now for Discovery, looks at TV. Instead of waiting for overnight cable ratings, he can check a dashboard at 7 a.m. to see what Discovery Plus subscribers watched and how they watched it.

Targeting Binge-Watchers

One surprise is how binge-worthy some of Discovery's shows are, like *House Hunters*, *Deadliest Catch* and *Gold Rush*, he said. Discovery is working on its own version of a binge-watching ad that will let viewers know that, thanks to a sponsor, they can watch the fourth episode commercial free.

Older shows from networks like Animal Planet and Science are getting new life via streaming, he added.

The future of the TV business is having a really smart

algorithm that figures out what people like to watch

and helps them find it, Steinlauf said. "The algorithm is the key to this business because I think it will make the experience so much more responsive for the consumer."

Discovery learned that, and other lessons, from its authenticated Go app, which launched about five years ago. In addition to curating content, Discovery had to develop programmatic technology and relationships. Lessons learned, the Go apps have been the fastest-growing part of Discovery's ad business.

Discovery has also found that ads on its Go apps generate CPMs that are twice that earned by cable networks. Discovery Plus, which reaches beyond cable subscribers, is getting triple cable's CPMs.

Steinlauf noted that the streaming ad business is different from the traditional TV business. Much of it operates on impressions among people age 2 and up, instead of ratings in a demo. Delivery is measured by ad servers at FreeWheel, instead of Nielsen, and impression guarantees and frequency limits can be managed in flight. And when the agreed-to number of impressions is reached, the ad stops running. No more under delivery or over delivery.

And that brings us back to the upfront. It's generally accepted in the market that the supply of impressions in linear channels will be tight, forcing advertisers to buy digital video.

But Steinlauf says no one knows how much premium digital video supply there will be. All of these new streaming services have launched, but they're still working to add and keep subscribers. And all of them have really low ad loads, he notes.

"With six to 12 months' worth of data in between upfronts, who's got the confidence that their app is going to grow subscribers and grow hours watched?" he asked. "We're not swimming in supply here. My personal opinion is that digital video is going to be tight and that's going to cause an even tighter upfront marketplace." ●



#SPRINGTV: A LOOK INTO THE FUTURE OF TELEVISION

Virtual event will bring together innovators
in three key industry categories

Future's Spring TV 2021 returns April 28-30 as a virtual event featuring a trio of summits that takes on the latest developments in three crucial industry segments: the Advanced

Advertising Summit, the over-the-top-focused Next TV Summit and a new entry tackling the emerging Free, Ad-Supported Streaming Television category, the FAST TV Summit. The event is sponsored and programmed by Broadcasting + Cable/Multichannel News, Next TV and TV Tech. Spring TV will bring together innovators and thought-leaders to share insights on the latest trends and developments. This virtual series is designed to help industry professionals gain new perspectives, delivering clear and actionable insights intended to advance careers and companies. Here's a listing of what's on tap for Spring TV 2021 as of press time. Not all speakers are listed and panelists are subject to change.

For a more up-to-the-minute agenda or to register, go to springtvevents.com.

FAST SUMMIT: ATTRACTING AUDIENCES FOR FREE STREAMING CONTENT



The growth in the Free, Ad-Supported Streaming TV (FAST) space has been phenomenal and is showing no signs of slowing down, as more services enter the ring and audiences accumulate. The FAST Summit provides a timely opportunity to assess the intensifying competition and current landscape, explore where platforms are achieving success in attracting audiences and look to the trends on the immediate horizon.

MONDAY, APRIL 26 Morning Sessions: Marketing FAST

10:30 a.m. - 10:35 a.m. (ET)
Welcoming Remarks

10:35 a.m. - 11 a.m. (ET)
**Opening Keynote:
The State of FAST in 2021**

This leading executive from a streaming service provider shares an insider's perspective on the current state of this fast-growing, free, ad-supported segment of the connected tv industry, and identifies some of the special characteristics and advantages of FAST. The executive also offers suggestions for programmers and media buyers to leverage relationships with FAST providers.

11 a.m. - 11:30 a.m. (ET)
What Advertisers Want

FAST offers advertisers and media buyers affordable opportunities to hyper-target consumers. Hear from a panel of media buyers and ad-sales executives as they discuss the unique advantages that advertising on FAST can offer now.

11:30 a.m. - 11:45 a.m. (ET)
What FAST Audiences Want

This data presentation offers recent findings on audience segments and how they consume free streamed content, and makes comparisons to current viewership of SVOD and traditional television programming.

11:45 a.m. - Noon (ET)
Attracting FAST Audience Segments

A panel of promotions and marketing executives from networks, programmers and FAST providers discusses the special challenges of attracting diverse audience segments to FAST services, driving awareness of programming and content viewership among these segments.



Noon-12:30 p.m. (ET)

Partnering with Manufacturers

FAST brings along a set of special challenges. For example, some services work with some smart devices while others require a different smart device to function. Explore the unique relationship between manufacturers and services providers in this fascinating fireside chat with a leading smart-device manufacturer and a top FAST provider.

12:30 p.m.-1 p.m. (ET)

Securing Carriage on FAST

This panel of programming distributors and content executives at FAST service providers discuss the distinct facets of their mutual relationship in delivering free, ad-supported streaming content directly to the consumer. Discover how FAST viewer consumption is redefining the content distribution business model.

1 p.m.-1:05 p.m. (ET)

Acknowledgements & Lunch Break**Afternoon Sessions: Marketing FAST to Hispanics**

1:30 p.m.-1:35 p.m. (ET)

Welcoming Remarks

1:35 p.m.-2 p.m. (ET)

FAST for Hispanics

2 p.m.-2:30 p.m. (ET)

How Advertisers Are Targeting Hispanics with DAR

FAST offers advertisers and media buyers seeking to target Hispanic consumers with affordable and highly effective media alternatives. This panel of media buyers and ad-sales executives will discuss the advantages that media placed on FAST can offer for reaching Hispanics in today's competitive market.

MODERATOR: Court Stroud, founder/managing director, The Cledor Group

PANELISTS: Karina Dobarro, EVP/managing partner, Horizon Media; Chris Pizzuro, SVP, Global Sales & Marketing, Canoe Ventures

2:30 p.m.-2:45 p.m. (ET)

What Hispanic Audiences Want from FAST

Be among the first to get these recent findings about Hispanic audience segments and their consumption of

free streamed content. This presentation will share data for FAST and compare current Hispanic viewer consumption to subscription and traditional linear television programming.

2:45 p.m.-3:15 p.m. (ET)

Attracting Hispanic Audience Segments to FAST

Increasingly, Hispanics are attracted to watching free ad supported streamed video content. This panel of promotions and marketing executives from networks, programmers and FAST providers explores how they are each attracting various audience segments among Hispanic viewers and driving awareness for select streaming brands and programming.

PANELIST: Adriana Waterston, SVP, Insights & Strategy, Horowitz Research

3:15 p.m.-3:30 p.m. (ET)

Hispanics as Smart Tech Consumers

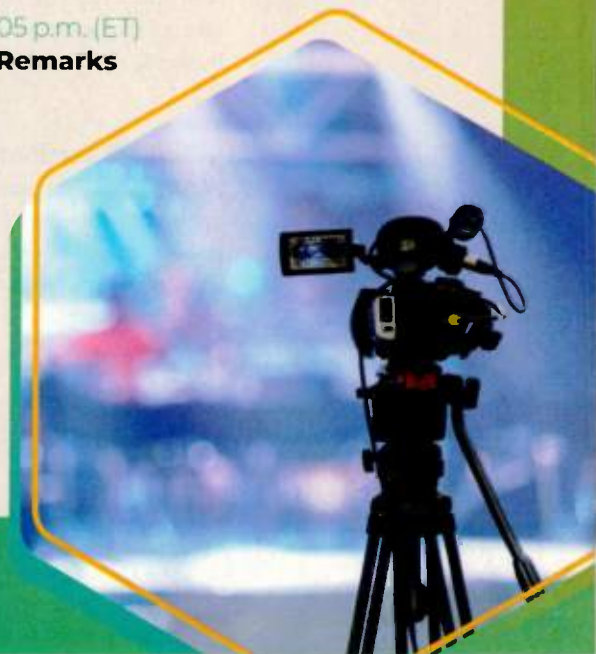
Hispanics are tech-savvy especially, when it comes to smart devices. This is where the manufacturer of smart devices plays a significant role in the growth of the FAST business in this market. Explore the unique relationship between manufacturers and streaming services who are targeting Hispanic consumers.

3:30 p.m.-4 p.m. (ET)

Securing Carriage for FAST Hispanic Content

This panel of Hispanic programmers, distributors and FAST content service providers share differing perspectives on how the dynamics of their mutual business relationship is changing as the demand for FAST delivered content grows among Hispanic consumers.

4 p.m.-4:05 p.m. (ET)

Closing Remarks

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The Business
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ADVANCED ADVERTISING SUMMIT: CREATE THE NEXT GENERATION OF ADVERTISING EXPERIENCES

The combination of COVID-19 and the recession it caused accelerated the shift to a more digital economy and pushed marketers to be more effective, efficient, targeted and accountable — all attributes promised by advanced advertising. If you are a marketer, in media, work with technology or invest in ad tech, you can't miss this event.

TUESDAY, APRIL 27

12:30 p.m.-12:35 p.m. (ET)
Welcoming Remarks

12:40 p.m.-1:05 p.m. (ET)

Keynote Speaker: John Nitti, Chief Media Officer, Verizon

A top marketer in the competitive telecom category talks about how he uses technology from his own company and from media partners to engage customers and boost sales. As a former top media buyer, Nitti has unique and valuable insights to share.

1:15 p.m.-1:50 p.m. (ET)

Making A Better Supply Chain

With more money and data being managed on automated systems, how can the industry maintain brand safety and avoid fraud while getting a better return on ad spending?

2 p.m.-2:30 p.m. (EDT)

New Currencies for A New Ecosystem

Media companies are looking for better metrics to monetize content and ad inventory. Marketers want to know what they're buying, who is watching it and what impact it is having. Learn what measurement and analytics companies are doing to keep up with a rapidly changing industry.

2:40 p.m.-3:05 p.m. (EDT)

Keynote Speaker: Matt Sweeney, Chief Investment Officer, GroupM

A top ad buyer at one of the world's largest agencies talks about ensuring that clients get the impressions they're guaranteed in a changing media environment. Sweeney will address what needs to happen to speed the shift of budgets from linear to more targetable video formats, the growth of CTV and the spread of automation.

3:05 p.m.-3:10 p.m. (EDT)

Closing Remarks

WEDNESDAY, APRIL 28

12:30 p.m.-12:35 p.m. (ET)

Welcoming Remarks

12:40 p.m.-1:05 p.m. (ET)

Keynote: Marianne Gambelli, President, Fox Advertising Sales

Gambelli is integrating Fox's broadcast, digital and streaming inventory into a single platform. She will talk about how that move will enable Fox to offer clients more relevant inventory, next-generation advertising products and the ability to reach bigger target audiences as the upfront market approaches.

1:15 p.m.-1:50 p.m. (ET)

How Local Media Profits from Advanced Advertising

Station groups and MVPDs are finding new ways to target their linear advertising and offer complimentary digital inventory in order to drive sales for both national and local clients. Top executives will share best practices for attracting incremental revenues and more effective campaigns.

SPEAKER: Daniel Church, Head of Advanced TV Product, Beachfront Media

2 p.m.-2:30 p.m. (ET)

Addressing Addressable Advertising

With expanding scale across providers and platforms, additional data sources and emerging identity solutions for a post-cookie environment, addressable advertising is in the spotlight. This panel will look at the technology that's available, what clients are seeking and what targeted campaigns can deliver.

2:40 p.m.-3:05 p.m. (ET)

Keynote: TBA

A top platform ad sales exec talks about how they are using data to help advertising reach target audiences at scale.

3:05 p.m.-3:10 p.m. (ET)

Closing Remarks



Advanced Advertising participants include (from top) Matt Sweeney of GroupM; Marianne Gambelli, Fox Advertising; and Daniel Church, Beachfront Media.

NEXT TV SUMMIT: THE BUSINESS OF STREAMING VIDEO

The Next TV summit is professional video industry's authoritative benchmark for assessing the progress and debating the future of television's digitally-driven streaming transformation. Hear current thinking from some of the industry's leading executives as they discuss the most pressing economic, operational and technological issues facing the "business" of video.

THURSDAY, APRIL 29

1 p.m.-1:05 p.m. (ET)
Welcoming Remarks

1:05 p.m.-1:25 p.m. (ET)
Opening Keynote: Jill Rosengard Hill, EVP, Global Media & Entertainment, Magid

1:30 p.m.-1:55 p.m. (ET)
Opening Keynote Conversation
INTERVIEWER: Tim Hanlon, Founder/CEO, The Vertere Group
PANELIST: Josh Reader, President, Distribution, AMC Networks

2 p.m.-2:35 p.m. (ET)
OTT vs. CTV: The Battle for TV's New Operating System
As traditional broadcast and MVPD television delivery mechanisms give way to an avalanche of direct-to-consumer streaming options, the competition to control the gateway between content, advertising and the viewer is becoming intense. We discuss what's ahead in the world of devices like pucks, sticks and especially smart TVs themselves.

2:40 p.m.-3:05 p.m. (ET)
Keynote Conversation

3:10 p.m.-3:45 p.m. (ET)
57 (Thousand) Channels & Nothing On?
With a blizzard of streaming content choices available to even the most basic of U.S. media households, consumers risk being overwhelmed by even the simplest of viewing decisions; we discuss how programmers and consumers can each benefit by coming improvements in content guidance, navigation, recommendation, and search.
PANELISTS: Ben Maughan, SVP/GM, Consumer & Stream Platform, Experi; Rose Adkins Hulse, CEO, ScreenHits TV; Catharine Burhenne, VP, Marketing, Reelgood

3:50 p.m.-4:25 p.m. (ET)
Skinny Bundles & the Legacy of 'Linear'
Despite repeated proclamations to the contrary, the "death" of the linear television channel appears premature in the streaming age. The surprising durability of classic channel grids, familiar programmer brands and even a new breed of linear FAST/streaming TV-like channels pose a bevy of opportunities and challenges, which we'll discuss.

4:25 p.m.-4:30 p.m. (ET)
Closing Remarks

FRIDAY, APRIL 30

1 p.m.-1:05 p.m. (ET)
Welcoming Remarks

1:05 p.m.-1:25 p.m. (ET)
Opening Keynote Presentation: Brian Fiori, SVP, Audience Insights, Nielsen

1:30 p.m.-1:55 p.m. (ET)
Opening Keynote Conversation: TBA

2 p.m.-2:35 p.m. (ET)
SVOD's 'Mid-Majors'

While industry pundits obsess over a supposed zero-sum game of streaming TV dominance between leviathans like Netflix, Disney Plus and HBO Max, we explore a myriad of other premium and specialty content services angling for consumer attention and subscription share-of-wallet.

2:40 p.m.-3:05 p.m. (ET)
Keynote Conversation
INTERVIEWER: Tim Hanlon, Founder/CEO, The Vertere Group
PANELIST: Michael Bishara, SVP & GM, OTT & Digital Syndication, Discovery Networks

3:10 p.m.-3:45 p.m. (ET)
Broadcast TV in the Age of Streaming
Traditional broadcast television sits precariously between heritage linear OTA and MVPD distribution models and a burgeoning streaming TV ecosystem; we discuss how networks, affiliated stations and groups, and consumer-driven tech intermediaries are helping modernize "broadcast" for the realities of modern-day streaming.
PANELISTS: Jim Long, Founder & CEO, Local BTV/Didja; Jonathan Barzilay, Chief Operating Officer, PBS; Kevin Dunaway, VP, Affiliate Relations, VUit/Syncbak; Adam Wiener, EVP & GM, CBS Local Digital Media

3:50 p.m.-4:25 p.m. (ET)
Who, What, When & How: Streaming TV Audience Measurement & Analytics
The "mainstreaming" of on-demand TV threatens to upend a fragile ecosystem of audience measurement, already challenged by traditional paradigm changes like cord-cutting, DVR recording and device-based viewing. How can programmers, advertisers and streaming TV operating systems accurately judge "success" in the years ahead?
PANELISTS: Marty Roberts, CEO, Wicket Labs; Alejandro Rojas, Director of Applied Analytics, Parrot Analytics; Traci Will, VP of Analytics, Gamut; Michael Bologna, President & CRO, HyphaMetrics

4:25 p.m.-4:30 p.m. (ET)
Closing Remarks



TV Finds Talent on Great White Way

Broadway has been down for over a year, but plenty of its stars are willing to work



By Michael Malone
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Producers have experienced a wide variety of headaches while shooting across the past year, but one mostly unforeseen plus has perked up amidst the pandemic: The amount of Broadway talent available for television, with New York's esteemed theater district down for the long term.

Stage stars are popping up in the cast of HBO dramas *Succession* and *Mare of Easttown*, Epix dramedy *Bridge and Tunnel*, and a range of Hallmark Channel holiday films, including *Mix Up in the Mediterranean*.

Michelle Vicary, executive VP of programming and network publicity at Hallmark parent Crown Media Family Networks, said the network has been keen to tap Broadway talent for a couple years, but saw more opportunities open up when Broadway went on hiatus. "Our goal as we move forward is, we want to

continue to work with them," Vicary said. "With Broadway down, our ability to tap into this amazing talent is really obvious for us to do."

Mare of Easttown, with Kate Winslet playing a detective in a working-class Pennsylvania town (see *The Watchman*, page 6), has Broadway talent such as Joe Tippett (who starred in *Waitress*) and Neal Huff (who was in *To Kill a Mockingbird*) in the cast. Tippett plays Dan, husband of *Mare*'s best friend, and Huff portrays a priest.

Mare of Easttown creator Brad Ingelsby was on board with Broadway talent right away. "Brad inhaled it," said casting director Avy Kaufman. "He loved it."

Good TV projects appear to be a logical pursuit for a stage actor stuck at home, waiting for theaters to reopen. "I would imagine those actors would be looking for an outlet; I hope

The Broadway hiatus has added star power to shows like Epix series *Bridge & Tunnel* (top) and Hallmark Channel movie *One Royal Holiday*.



they're getting work," Ingelsby said. "I hope the ramp-up in the TV world and the movie space would provide opportunities."

Triple Threats

To be sure, Broadway talent has long appeared on television. One needs only to leaf through a Playbill to see how many cast members have turned up in the various *Law & Order* shows. More of the thespians are available to work these days. "A lot of it has to do with availability," Kaufman said. "People just plainly were not available. Now, it's let's just keep people working."

Stars of the stage often bring unique gifts to the set that may not be available from a veteran screen actor. Shooting Epix's *Bridge and Tunnel*, about a group of college grads on Long Island pondering their grand life plans, creator Edward Burns acknowledged "access to such a deep pool of actors" in New York. "With Broadway down," he added, "it's a deeper pool."

Barrett Wilbert Weed, who starred in *Mean Girls* on Broadway, plays Lizzie, who sings in an all-female punk band in *Bridge and Tunnel*. "She's a big deal on Broadway, a major singer," Burns said. "She's probably not available otherwise."

The Hallmark Christmas movie *One Royal Holiday* initially did not have a musical number. But when Broadway standouts Laura Osnes, whose stage credits include playing Cinderella in

Cinderella and Sandy in *Grease*,

and Aaron Tveit, who starred in *Moulin Rouge!*, came on board on the project, they suggested a song. The pair ended up performing a version of "Winter Wonderland" that opens the movie.

Vicary said it's usually a smooth transition for a stage star to do television. "They are consummate professionals who are able to navigate the TV screen as easily as they do Broadway," she said.

What helps the theater stars work out at Hallmark is that a Broadway show and Hallmark movie have similar goals in terms of reaching an audience. "So much of what Broadway does is what Hallmark does — it makes you feel good, feel positive, feel better about the world," Vicary said.

Curtain Raiser Come Fall

Last month, New York City Mayor Bill de Blasio said the city plans to set up a coronavirus vaccination site on Broadway to give shots to theater industry workers, in addition to a mobile vaccination unit to serve theater workers beyond Broadway.

Theaters in New York State were permitted to open April 2 at 33% capacity, with a limit of 100 people indoors. That's not enough to make Broadway productions viable.

Mayor de Blasio hopes to reopen Broadway theaters in the fall. "This is going to be a year to turn things around," de Blasio told *The New York Times*. "It's time to raise the curtain and bring Broadway back."

Other TV productions boasting Broadway talent include *Succession*, which has three-time Tony nominee Linda Emond on board to play a senior White House aide in season three, and the Showtime drama *Rust*, which borrows Bill Camp and Dallas Roberts from the stage, and whose lead, Jeff Daniels, played Atticus Finch in *To Kill a Mockingbird*.

At Hallmark, Jeremy Jordan, who starred in *West Side Story* and *Waitress* on Broadway, had the lead in movie *Holly & Ivy* last year ("one of the most beautiful projects we've done," said Vicary), and stars in *Mix Up in the Mediterranean*, which premiered on Hallmark Feb. 20. That one is about a small-town cook who impersonates his twin, a big-city chef, to compete in a culinary contest, and falls in love. Jordan played both.

Even when Broadway is up and running again, Hallmark execs hope stage talent will think about doing their movies in between Broadway shows. "What an honor it's been to broaden our work with these amazingly talented people," Vicary said. "It's such a win for our network, and we look forward to doing more." ●



John Stamos as Coach Marvyn Korn in *Big Shot*

REVIEW

BIG SHOT

(Disney Plus, Premiering Friday, April 16)

JOHN STAMOS PLAYS a big-time college basketball coach, Marvyn Korn, who is fired after hurling a chair at a referee. No other major basketball programs want any part of him. Then his agent mentions a possibility.

"Don't tell me it's Division II," said Korn. His agent stares at him blankly. "III?"

Not even. Korn is offered a job coaching a girls' high school team outside San Diego. Desperate to get back to work, he takes the job.

What ensues is somewhat predictable — the clash between woke teens and a man old enough to be their grandfather over the way he talks to them, and just about everything else both parties do. Korn also clashes with one player's parent — a major benefactor to the school who is wholly focused on his daughter getting a college scholarship.

Alongside Stamos in the cast is Jessalyn Gilsig as his assistant coach on the Sirens and Yvette Nicole Brown as his principal, and Sophia Mitri Schloss, Nell Verlaque, Tiana Le and Monique Green as his players.

The basketball scenes, and there are many, feel authentic, and the young actresses are athletic. For his part, Stamos is convincing as a basketball

coach. He reveals a deeper character than the win-obsessed bully he's known to be when he shares with his players, during halftime of a game they are getting crushed in, how his own poor play fueled his coaching ambitions.

Anyone who's watched a movie or series with sports at the center knows full well the team will play far better after Coach's heartfelt speech. But as the pilot winds down, one does find oneself curious about how the team, and the new coach, will prevail as the season progresses.

David E. Kelley is an executive producer. Episodes come out weekly.

Big Shot is fun, and it's not hard to get invested emotionally in whether Korn can turn the team, and himself, around. March Madness may be done, but the series offers a bit more entertaining basketball action to watch. — MM



Stamos and co-star Jessalyn Gilsig

Big Four Are Sports TV's Comeback Kids

And with an assist from ESPN, Disney's ABC is a primetime player once more



By R. Thomas Umstead
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While streaming services such as Amazon Prime Video and ESPN Plus made the most

noise from the just-inked National Football League and National Hockey League television rights deals, broadcast networks also scored valuable live content under the long-term pacts.

The Big Four broadcasters — ABC, CBS, Fox and NBC, considered long past their prime as major live-sports distributors — retained their status as the pre-eminent outlets for NFL regular season and playoff games, including the Super Bowl (see Business, page 26). And ABC leveraged its corporate Disney connection to ESPN to add Monday Night Football doubleheaders and a pair of Super Bowls, as well as four Stanley Cup Finals over its seven-year deal with the NHL.

Amazon in Primetime

Amazon Prime Video garnered headlines when it snagged the Thursday Night Football package away from Fox starting in 2023 as part of the new 11-year NFL TV deal, which also ends the simulcasts on NFL Network. Fox and CBS will continue to offer the lion's share of regular-season Sunday afternoon NFL games and NBC will keep TV's most-watched series, Sunday Night Football. ABC will join the three networks in rotating the Super Bowl telecasts — typically the most-watched

TV program of the year — through 2031.

CBS Sports chairman Sean McManus said that the broadcast network remains the key component of its NFL distribution strategy even as the network's telecasts will also be simulcast on Paramount Plus. "The NFL will really be a driver of value and a driver of audience on our linear networks, on our digital networks and our streaming networks," McManus said in a keynote speech at the NATPE Virtual Business of Live Sports TV conference March 23.

Along with two Super Bowl telecasts, ABC also picks up three annual Monday Night Football telecasts as well as two late-season Saturday afternoon simulcast games with ESPN. ABC is a major component of ESPN's overall NFL television strategy, NFL Media executive VP and chief operating officer Hans

ESPN's seven-year NHL rights deal gives ABC the rights to four Stanley Cup Finals.



Schroeder said during ESPN's March 18 conference call on the NFL deal. "When you think about ... ABC coming back into the partnership for a number of exclusive games and also playoffs and Super Bowl, you think about the opportunities to leverage the different traditional channels and outlets ESPN and the Disney family have," Schroeder said.

ABC also skated away with additional live sports content from Disney's new TV deal with the NHL. ABC will have exclusive coverage of the Stanley Cup Finals for four years of the overall seven-year agreement. The broadcast network will also share 25 exclusive, national regular-season games with ESPN, as well as live exclusive coverage of one Conference Finals series and half of all first-round and second-round games from the Stanley Cup Playoffs.

The NHL, now in the final year of an exclusive U.S. arrangement with NBC Sports Group, is still seeking a second TV partner.

ABC Back on the Grid

With broadcast networks and their affiliated stations looking for high-profile content to lead into its advertiser-attractive local news segments, sports analyst Lee Berke said ABC's addition of the Super Bowl and Stanley Cup telecasts — as well as NFL Monday Night Football games and NHL regular and postseason games — will pay dividends for the broadcast network well into the decade.

"ABC up to this point has been a laggard in offering sports to drive viewers to local news — all they really had was the NBA and college football — as the bulk of their sports programming moved over to ESPN," he said. "Now, along with SEC college football, they will have the Stanley Cup finals every other year, Monday Night Football and placement in the Super Bowl rotation to go along with the NBA Finals.

"When put in context, you're now looking at 60 to 80 marquee sports events a year on ABC," he said. "They have really bulked up." ●

REVIEW

CRUEL SUMMER

(Freeform, Premieres Tuesday, April 20 at 9 p.m. ET)

FREEFORM TAKES AN INSIDE look at the often-complicated lives of teenage girls in its new original series, *Cruel Summer*.

The series, executive produced by Jessica Biel, provides a unique perspective into the lives of two teenagers, Jeanette Turner (Chiara Aurelia) and Kate Wallis (Olivia Holt). Set in the 1990s, the story takes place over the course of three years and chronicles the events that surround Kate, the seemingly glamorous and popular high school girl with a hunky boyfriend, and Jeanette, the cute-but-nerdy girl who wants to be popular like Kate.

Jeanette's obsession with Kate is made obvious early in the series, when during a chance meeting at the mall Jeanette



can hardly bring herself to say hello to the pretty Kate. Kate is polite but pays Jeanette little mind as her boyfriend Jamie (Froy Gutierrez), who is Jeanette's secret crush, soon occupies all of Kate's attention.

The series flashes forward and back, playing out the circumstances that eventually led to Kate's disappearance and

Chiara Aurelia (l.) and Olivia Holt in Freeform's *Cruel Summer*.

a makeover of Jeanette from an obscure, awkward teen to the new "it girl" at school. With the cloud of Kate's disappearance hovering over the town and questions regarding Jeanette's image transformation, it becomes clear that there's more to the relationship between Kate and Jeanette than meets the eye.

Cruel Summer cleverly portrays the evolving lives and challenges each girl faces both in their social and family lives through flashbacks and flash forwards between the three years, while building the toward the inevitable conclusion of what happened to Kate, and the clear evolution of Jeanette's appearance, mood and emotional state as she becomes inevitably tied to Kate's disappearance.

Viewers will have to stay engaged as the eight-episode storyline travels quickly back and forth across the three years, but it's worth the investment to see how *Cruel Summer* shrouds a fascinating mystery within the many facets and dimensions of teen life. — RTU

REVIEW

THEM

(Starts April 9 on Amazon Prime Video)

SUPERNATURAL ELEMENTS and a backdrop of 1950s racism provide a potent mix of terror for Amazon Studios' anthology series *Them*.

The limited series focuses its first season on a Black family who moves to California from the Jim Crow south during the Great Migration of the 1950s. The father of the Emory family and engineer, Henry (Ashley Thomas), wants a better life for his wife Lucky (Deborah Ayorinde) and two daughters, Ruby (Shahadi Wright Joseph) and Gracie (Melody Hurd), and entrusts that the openness and freshness of the Los Angeles suburb of East Compton will provide the family with a slice

of the American dream.

But within five minutes of driving through the all-white neighborhood, it's clear the community won't welcome the Emorys with open arms. A protest sit-in in front of the Emory house organized by the neighborhood wives, led by antagonist Betty Wendell (Alison Pill), is just a slice of what is in store for the family.

Undaunted, the Emorys go on enthusiastically with their lives — even as Lucky prepares for the worst by pushing bullets into a pistol at the kitchen table — but a supernatural entity emerges from the basement of the home to further torment the family. Several scenes between Lucky and her youngest daughter, Gracie, in early episodes portend some scary situations for viewers.

Them will undoubtedly be compared



The Emory family (top) battles the supernatural and bigoted neighbors like Betty Wendell (Alison Pill, below) in *Them*.

to Jordan Peele's *Us* and the Golden Globe-nominated HBO series *Lovecraft Country* series in its feel, as well as its mix of supernatural elements and overt racism that at times is more terrifying to the protagonists. Executive producer Lena Waithe does a good job of setting the stage for what could potentially be a fascinating and at times scary tale. — RTU



Indianapolis Stations Court New Viewers

New owners shake up television in Indiana capital



By Michael Malone
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The whole of March Madness was consolidated in one market, and there may not have been a more logical home than Indianapolis.

Beloved basketball movie *Hoosiers* was, of course, set in Indiana, and the state capital loves its hoops.

"Indiana is one of those places where basketball is king," said Dominic Mancuso, VP and general manager, WXIN-WTTV.

Besides turning out for games, Indianapolis residents were eager to help with putting on the show and showing off their home city. "So many people are volunteering for things to help make the area look good," said Lana Durban Scott, WRTV VP and general manager, in late March.

Baylor won the tournament, and Fox affiliate WXIN wins many of the news races. In February, WXIN easily won the 6-7 a.m. battle in both households and viewers 25-54. WTHR, an NBC affiliate, won the household race at 5 and 6 p.m., and WXIN took both titles in 25-54. At 11 p.m. in February, WTHR scored a 3.5 in households. WXIN and WTTV were at 2.2, WRTV at 1.7 and WISH at 0.8. In the 25-54 demo at 11, WXIN posted a 1.4, just ahead of WTHR's 1.3. WTTV scored a 0.9, WRTV a 0.5 and WISH a 0.2.

Nexstar owns WXIN and CBS affiliate WTTV, closing on the pair in 2019. Tegna has WTHR, acquiring it from Dispatch Broadcast Group in 2019. Scripps owns ABC affiliate WRTV and DuJuan McCoy's Circle City Broadcasting has CW affiliate WISH and MyNetworkTV outlet WNDY. WDNI airs Telemundo.

Comcast (Xfinity) is the market's major pay TV operator.

WXIN's Darius Johnson reports from the Indianapolis Motor Speedway

WTHR is the legacy station, and Indianapolis insiders say the NBC affiliate does not dominate the way it used to. Budgets have tightened since Tegna acquired the station, they note. WTHR did not respond to requests for comment.

Tighter Local Race

WXIN has gathered momentum with a tireless approach to news. "Local, local, local" is how Mancuso sums up the WXIN-WTTV philosophy, mentioning nearly 90 hours a week of local news. The stations share a newsroom but go head to head in several time slots, including 5 and 6 a.m., 5 and 6 p.m. and 11 p.m.

"We have legacy talent that's done very well," said Mancuso. "We also have new talent that's done very well too."

WXIN's morning show goes from 4 to 10 a.m. and is a beast. Morning anchor Ray Cortopassi departed in September, joining WGN Chicago. "We've been very happy with our replacement," said Mancuso of anchor Daniel Miller, who came from WFXT Boston, and previously worked at WISH.

WTTV became the CBS affiliate in DMA No. 25 in 2015, taking it from WISH, which shifted to The CW. WTTV anchors Debby Knox and Bob Donaldson anchored CBS Weekend News last May when the CBS Broadcast Center in Manhattan was shuttered due to the pandemic.

WISH is all in on local news. McCoy was born and raised in Indianapolis, and graduated from Butler University. He jumped at the chance to own a station in his hometown. He said the station's 82 hours of news a week may be tops in the nation.

All Indiana is the WISH branding. Last year, the Sunday program *All Indiana Politics* launched. A 4 p.m. daily show, offering a mix of light news and lifestyle content, bears the *All Indiana* name, as does a local podcast network that launched during the pandemic. With some 250 podcasts, the network hosts local businesses' programs. WISH retains the rights, and the podcasts boost traffic on WISHTV.com.

"It brings in new media consumers,

and gives them a sample of what WISH TV has to offer," said McCoy.

One hit podcast is homegrown. Year-old Daily 8 is hosted by WISH anchor Kylie Conway. "It cuts through the noise and gives people the facts they need to know right away," said McCoy, calling the host "a true journalist."

The 69,000-square-foot WISH headquarters will be home to Multicultural News Network, a venture involving Circle City and Cox Media Group. McCoy is aiming for a fourth quarter launch, hiring around 150 staffers for the 24-hour network. "We'll aggregate all the multicultural groups in one network," said McCoy, who stressed that MNN will be a network with affiliates and not a channel.

Al Carl runs the "News 8" newsroom at WISH. There's currently no general manager, but McCoy plans to hire one down the road.

Sister WNDY airs an array of live, local sports.

WRTV has launched an over-the-top channel that offers users a mix of station content and Scripps programming. Durban Scott aims to evolve it to more local and less corporate. "It's an opportunity to get content in front of more eyeballs, to get your storytelling in front of more faces," she said.

Getting Hoosiers to Work

WRTV pushes a "Hiring Hoosiers" franchise that appears on air and online. The initiative "works to connect



This is a hard-working, humble town, a little bit rural, a little bit city. It's market No. 25, but I don't know that it feels like market No. 25.

— Lana Durban Scott,
VP and general manager, WRTV

WTTV's Morning News team (l. to r.): meteorologist Jim O'Brien, anchors Angela Ganote and Daniel Miller and traffic reporter Britt Baker.

Hoosiers to employment opportunities, career development resources, training programs and educational paths," according to the station.

"The company urged each station to come up with a franchise topic," said Durban Scott. "It can be hard to get buy-in in a cynical world, but the staff is all in."

Pharma colossus Eli Lilly is based in Indianapolis, as is healthcare giant Anthem. Residents describe the market as having a classic Midwestern sensibility — affordable, not much traffic, low crime and loads of decent people. "It's a great Middle American market," Mancuso said.

In terms of news content, they suggest Indy punches a bit harder than its weight. "This is a hard-working, humble town, a little bit rural, a little bit city," said Durban Scott. "It's market No. 25, but I don't know that it feels like market No. 25." ●



WISH anchors Brooke Martin and Alexis Rogers on the set.

WISH NEWS TACKLES ALL OF INDIANA

WISH BEARS "All Indiana" branding, and holds true to the motto in its mission to spread its news product statewide. The station seeks affiliates to run WISH news, and has WRJK Chicago and WHME South Bend on board.

DuJuan McCoy, president and CEO of WISH parent Circle City Broadcasting, focuses on border residents — Indiana people based in the DMAs of other states. He estimates that 1.2 million Indiana residents get local news from non-Indiana stations. Gary, Indiana residents, for one, get Chicago news.

"We're working on Cincinnati, Louisville and Evansville," said McCoy. "Once we get those, we'll have full statewide coverage."

In September, WRJK began airing 80-plus hours of WISH news weekly. Last April, WHME started airing more than 60 hours of WISH news each week.

Circle City acquired low-power stations in Fort Wayne and Terre Haute and plans to put WISH news product on in those markets. "My news can go anywhere I want it to, because I own it," said McCoy.

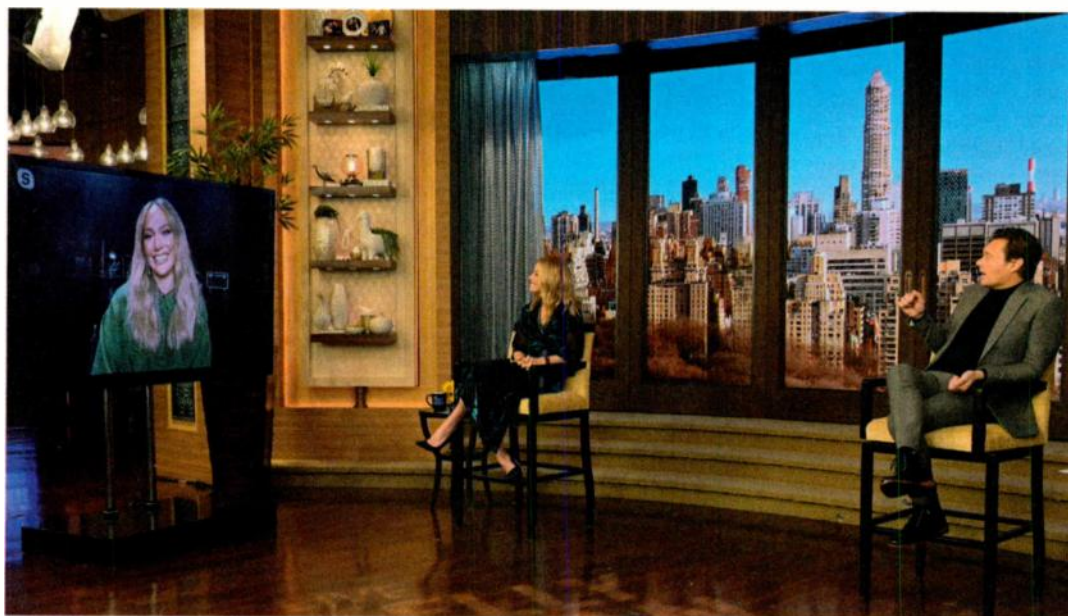
WISH will also offer *All Indiana Bets*, a weekly sports betting show it aims to launch in the fall, to affiliate partners.

The syndicated news strategy drives traffic and on demand viewing on WISHTV.com. "It's a brand extension for WISH TV and my news brand," McCoy said. "It's not a moneymaker at this point, but it will be." — MM



'Live' Leads Talk for First Time in its 33-Year History

Pandemic has driven syndicated talk ratings down drastically



By Paige Albiniak
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In its 33rd season, Disney Media Distribution's *Live with Kelly and Ryan* is hitting historic highs. It's the first time the iconic daytime talker has led the genre in all key measures: households, demographics and total viewers.

In the week ended March 21, the last week for which national ratings were available as of press time, *Live* out-delivered its nearest rival, CBS Media Ventures' *Dr. Phil*, by 13% in households with a 1.8 live-plus-same-day household rating, according to Nielsen, compared to *Phil*'s 1.6. It also beat *Phil* by 13% in total

viewers with 2.531 million on average compared to *Phil*'s 2.245 million, and by 33% in daytime's key demographic of women 25-54 with a 0.8 compared to *Phil*'s 0.6.

Live has led or tied in talk among all three of these measures for the past 16 of 17 weeks, according to Disney.

The show also has been the top talker among women 25-54 for 54 consecutive weeks, including 12 weeks of ties, since the week ended March 9, 2020. And it's leading talk in the season-to-date race for the first time in its history with a 1.9 live-plus-same-day season-to-date household average, according to Nielsen, compared to *Dr. Phil*'s 1.8. It's beating *Phil* by 6% among total viewers season to date, averaging 2.655 million

Kelly Ripa (l.) and Ryan Seacrest are back in *Live*'s New York studio, even if some guests are appearing remotely.

compared to *Phil*'s nearly 2.5 million; and it's leading among women 25-54 with a 0.8 to *Phil*'s 0.7.

Staying 'Live' During the Pandemic

Live has managed to do this during one of the strangest times in television history: the pandemic. At this time last year, levels of people watching television were up by some 25% as people suddenly found themselves quarantined at home with everything shutting down around them. That ratings boost didn't last long as people settled into their quarantine routines, but *Live* quickly adapted. The show never went off the air and it never stopped being produced live, even when everything suddenly had to go remote.

"We felt strongly about getting back on the air immediately," Michael Gelman, *Live*'s executive producer since before it went national, said. "We never missed a day that we weren't planning to have off. We came right back and we've been doing the show ever since — first virtually and now in the studio."

"Nobody knew what to do in the pandemic, there was no road map for it," said Rob Mills, executive VP of unscripted and alternative entertainment for Walt Disney TV. "[*Live*] certainly didn't have a plan. The only thing they knew was that the audience needed them. So they worked and they mobilized and they figured out how they were going to do this. That is what came through — that they and we were all in this together."

Live returned to its Manhattan studio after Labor Day, although with no studio audience, and masks and social distancing in place. Hosts Kelly Ripa and Ryan Seacrest sit far apart even though a camera trick makes it look like they are seated next to each other. Guests, like Eddie Murphy in a recent appearance, still Skype in, but more and more celebrities are coming into the studio for live interviews.

"It's so much better being back in the studio," Gelman said. "Just being within vision distance of the hosts and the stage manager and other producers, it feels

pretty good. It's hard to be funny and have the same chemistry when you're home with a two-second delay.

"And now we have guests coming back into the studio. That's what our show is about—it's about interacting with people in a real, personal way. We did what we had to do during the pandemic, but it works so much better to be in the studio."

The key to *Live*'s continued success, Gelman said, is still that it feels like a "husband and wife or brother and sister chatting. They are people you would want to have a cup of coffee with, whether virtually or in real life. That original premise continues to work."

While the premise still works, the original hosts have had to be swapped out several times. Gelman makes that process sound simple, but identifying that kind of chemistry and successfully introducing a new host to an audience of fans requires a certain level of genius.

"It is a testament to Gelman's stewardship that they know exactly who their audience is," Mills said. "No matter who has been sitting in those host chairs, it still has that feel that they're family members. And no small part of that is because we're going on 20 years with Kelly, who has become a member of people's extended families."

Changing Hosts Without Missing a Beat

Live also has successfully done what very few other shows have done: stay at the top of its game for decades even when the hosts have changed. When *Live* went national in 1988, it was originally hosted by Regis Philbin and Kathie Lee Gifford, although Philbin hosted a local version of the show, called *The Morning Show*, with Cyndy Garvey for five years before that. When the show went national, it grew into a huge hit.

When Gifford said she was leaving the show in 2000, instead of frantically filling her slot with a new co-host Gelman took his time, booking many guest hosts to sit next to Philbin over the next year. In fact, the show was renamed *Live with Regis* from



They are people you would want to have a cup of coffee with, whether virtually or in real life. That original premise continues to work.

— Michael Gelman,
executive producer, *Live with Kelly and Ryan*

2000 to 2001 until Kelly Ripa was finally announced as Philbin's new permanent co-host on Feb. 5, 2001. The show's ratings lost no ground with Ripa on board and in fact improved substantially among younger audiences.

Live with Regis and Kelly aired for 10 years until Philbin announced his retirement in 2011: his final show aired on Nov. 18, 2011. Again, Gelman launched a search for a new host—while renaming the show *Live with Kelly*. After more than nine months and many guest hosts, NFL Hall of Famer Michael Strahan was introduced as the show's new co-host on Sept. 4, 2012. During his four-year run, ratings for *Live with Kelly and Michael* shot up, but the morning chatfest still didn't manage to claim the mantle of top talker.

That was largely due to the iconic run of Oprah Winfrey, who ended her wildly popular afternoon talk show in May 2011. After that, Oprah spin-off *Dr. Phil* became daytime's highest-rated talker. Both of those shows aired in the afternoon, when more viewers tend to tune in.

Strahan departed *Live* on May 13, 2016, to join ABC's *Good Morning America* and the search was on again. This time, *Live with Kelly* aired for almost an entire year before Ryan Seacrest was named Ripa's co-host on May 1, 2017.

Again, the show hasn't missed a beat during that time, even though Seacrest

continues to host ABC's primetime competition series, *American Idol*, and his nationally syndicated radio show *On Air with Ryan Seacrest*.

"We pick the people because of their chemistry and then they come into this efficient machine with a host in Kelly who's already beloved and professional. Take all of those things together and it's the perfect way to continue the show with this new person," Gelman said.

Pandemic Causes Ratings Declines

While *Live with Kelly and Ryan* is celebrating its first run at the top of talk after all of these years, the pandemic has wreaked havoc on the ratings of syndicated shows. Every talk show is down year to year, and some significantly.

Even *Live* is down 18% in the week ended March 21 compared to the same week last year when levels of people watching television were up 25% after quarantine had just set in.

Other talkers are down far more, including *Dr. Phil*, which faced many pre-emptions due to the return of the NCAA men's college basketball tournament, declining 33% to a 1.6 in the week ended March 21 from a 2.4 in the same week in 2020. Warner Bros.' *Ellen DeGeneres*, which was the subject of many stories about the show's toxic atmosphere over the summer, has plummeted 44% to a 1.0 from a 1.8 in 2020. And NBCUniversal's sophomore Kelly Clarkson has decreased 36% to a 0.9 from a 1.4.

Executives don't love the fact that the ratings have downshifted so drastically, but they are taking their wins where they can.

"As someone who grew up watching broadcast and then working in it, having so many options leads to less shared cultural experiences," Mills said. "That's why we need shows like *Live* more than ever. They form the foundation of our cultural make-up."

"I think we've hit the mark during these times with the right programming and the right hosts," Gelman said. "We're doing the right thing at the right time." ●



Operators Brace for Spike in NFL Costs

Analysts expect big license-fee hikes to pay for 10-year, \$95 billion pacts



By Mike Farrell
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The jury is still out as to how broadcasters and cable sports programmers expect to pay for the landmark 10-year, \$95 billion deal for National Football League rights, but many distributors are bracing for big increases in retransmission consent and affiliate fees to pay at least some of the freight.

The NFL deal spreads rights payments over 10 years for CBS, ABC, Fox and NBC Sunday regular-season and playoff games and ESPN for Monday Night Football. Amazon Prime Video stepped up for Thursday Night Football contests, agreeing to pony up about \$1 billion annually for exclusive rights for the games, which shouldn't have an impact on pay TV.

The new deal doesn't take effect until 2023, meaning that operators will have at least a two-year reprieve until the next retrans cycle. While some analysts have said recent retrans negotiations likely took an increase in NFL rights costs into account, they probably didn't anticipate a doubling of the fees programmers paid — and virtually were forced into paying.

"[A]s more premium content is shifted to DTC platforms, as ViacomCBS and NBCU have shown with their new NFL contracts, the industry runs the risk of both higher cord-cutting and greater viewer erosion," Moffett-Nathanson media analyst Michael Nathanson wrote in a note to clients.

"In particular, those programmers — again ViacomCBS and NBCU — who appear to abandon their linear programming obligations by rapidly shifting premium content over to their DTC platforms run the risk of getting dropped by MVPDs and/or suffering lower annual price escalators, especially as it relates to growth in retrans."

For the most part, cable operators are anticipating a big jump in retrans costs in the next couple of years. Those that have finalized pacts in the past year shouldn't feel the pain of any NFL-related increases immediately. But since retrans deals are usually three to five years in length (and the NFL rights deals go through 2033), they will feel the pain eventually.

Distributors that will probably have to face a retrans negotiation this year include Dish Network, Cox Communications, AT&T's DirecTV and U-verse TV units and Altice USA, according to Kagan, a unit of S&P Global Market Intelligence. Dish deals for 113 Sinclair Broadcast Group stations in 83 markets and for 61 Tegna stations in 51 markets come up for renewal this year, according to Kagan, as do Cox's agreements for 33 Nexstar Media Group stations in 23 markets and 17 Sinclair stations in 12 markets. AT&T will have to negotiate for 28 Fox stations in 18 markets and Altice USA will start talks regarding 13 Fox stations in eight markets before the end of the year.

The NFL's 10-year renewal of its TV packages will net the league and its teams some \$95 billion.

However those deals turn out, multichannel video programming distributors (MVPDs) are bracing for increases that they, in turn, would like to pass onto consumers. (See chart, next page.)

Most of the top operators have increased their monthly broadcast surcharges to cover retrans increases, including Comcast, which boosted its surcharge by \$4.50 per month per subscriber in January to \$19.45, and Charter, which hiked its monthly surcharge by \$2.95, to \$16.45 per month, earlier this year. The figures are averages, and actual surcharges vary by market.

"I think this leads to even more



unsustainable price increases being demanded of pay TV providers and their customers,” Mediacom Communications senior VP of government and public relations Tom Larsen said. “That’s not a good scenario for the pay TV business long term.”

Some of those fee increases could be demanded by networks and stations that have been less active on the retrans front in the past. The new deal brings The Walt Disney Co.’s ABC back into the NFL fold for the first time since 2006, with rights to the Super Bowl in 2026 and in 2030, as well as three Monday Night Football games — in a doubleheader with ESPN — per year. In a research note, Barclays Group media analyst Kannan Venkateshwar noted that ABC has a significant retrans revenue gap of between \$200 million and \$600 million annually, compared to its broadcast peers, that should narrow with the NFL’s return.

“With Peacock, Paramount Plus, ESPN Plus and Amazon carrying NFL games, most football games will now be available on some streaming service, which is inevitably likely to result in the pace of cord-cutting accelerating significantly once the new deal fully kicks in and if Disney chooses to make football available on ESPN Plus,” Venkateshwar wrote.

Cable, satellite and telco TV operators will likely foot most of the \$95 billion bill over the 10-year period of the deal through higher fees, ACA Connects CEO Matt Polka said in a statement.

“Broadcast networks and TV station owners like Sinclair, Nexstar, Tegna and Apollo Global Management will continue to leverage the broken retransmission-consent rules to demand excessive fees from smaller cable operators, driving up the cost to watch what broadcasters like to call ‘free TV,’” Polka said. “In order to make up for their massive NFL obligations, broadcasters will hike their prices even higher — and, ironically, use blackouts of NFL games themselves in order to do so.”

KILLER FEES

Retransmission consent and sports network affiliate fees are expected to climb as broadcasters and ESPN pony up for NFL rights.

(\$ millions)	2014	2020	2025	CAGR (2020-2025)
CBS	\$580	\$3,590	\$4,130	3%
NBC	\$538	\$2,584	\$3,243	5%
FOX	\$753	\$2,970	\$3,407	3%
ESPN	\$7,276	\$8,894	\$8,894	0%
TOTAL	\$9,147	\$18,038	\$19,674	2%

SOURCE: Company reports and MoffettNathanson estimates and analysis

SLACKING OFF

Virtual MVPDs were able to take up some of the slack from declining traditional video providers in their early days, but that grip is expected to loosen over the next few years.

Subscribers (in millions)

	2017	2018	2019	2020	2021	2022	2023	2024	2025
VIRTUAL MVPDS	4.7	7.5	10	12	13.8	15.4	16.9	18.2	19.5
TRADITIONAL VIDEO	92.8	89	82.9	76.8	71	65.4	60.6	56.1	51.9
TOTAL	97.4	96.5	92.9	88.8	84.7	80.9	77.4	74.3	71.4

SOURCE: Company reports and MoffettNathanson estimates and analysis

While operators are reluctant to predict what impact NFL rights will have on retrans negotiations going forward, they are resigned to the reality that fees during the next cycle will be substantially higher. Whether or not they agree to pay them is another thing.

Could Push MVPDs To Breaking Point

In a research note, Nathanson said making programming as valuable as NFL football available both on broadcast and direct-to-consumer streaming services could be the last straw for MVPDs that have complained in the past about having to pay for networks

that were available elsewhere for free or at a lower price.

By making games available simultaneously on both linear and streaming platforms, Nathanson noted, programmers are risking “the possibility that distributors start to punish programmers who move their key content to their owned DTC platforms. As such, distributors may choose to entirely drop network offerings or decide to rein in their intended annual pricing escalators. Thus, a combination of rising cord-cutting and falling pricing power would crush media earnings.”

According to a distributor that asked not to be named, the streaming aspect of the deal could make dropping a broadcaster a more thinkable option, despite the pushback by consumers.

“It’s something that all providers, if they aren’t already thinking about it, they need to be thinking about it,” the distributor said.

Most operators were reluctant to be specific as to what impact the NFL contract will have on retrans fees because the new rights deal won’t kick in for another two years. Still, they don’t appear overly optimistic about the future.

“We remain concerned about the rising costs of sports content and the impact it has on consumers’ access to affordable video services,” Cox executive director, media relations Todd Smith said.

Nathanson observed that the new NFL deal appears to be focused on the league getting a bigger share of the retransmission consent fees that stations are paid by MVPDs.

“If prior deals were about extracting maximum value for ESPN, these deals were about reclaiming the billions of dollars of retrans payments that the broadcast industry has collected from distributors,” Nathanson wrote. During the last NFL rights negotiation, ESPN affiliate fees were 10 times higher than the retrans revenue of the average broadcast network. Now the ratio is about 5 to 1.

“With the current rise of cord-cutting and the acceleration in broadcast retrans revenues, we estimate that this gap will narrow even further over the course of the next deal,” Nathanson wrote, putting what MVPDs pay to stations even closer to what they pay ESPN.

The streaming implications of the new NFL arrangements could be the real wild card. According to reports, CBS, Fox and NBC have the right to simultaneously stream the games with their respective broadcast network, a right CBS held in prior deals with its CBS All Access (now Paramount Plus) service.

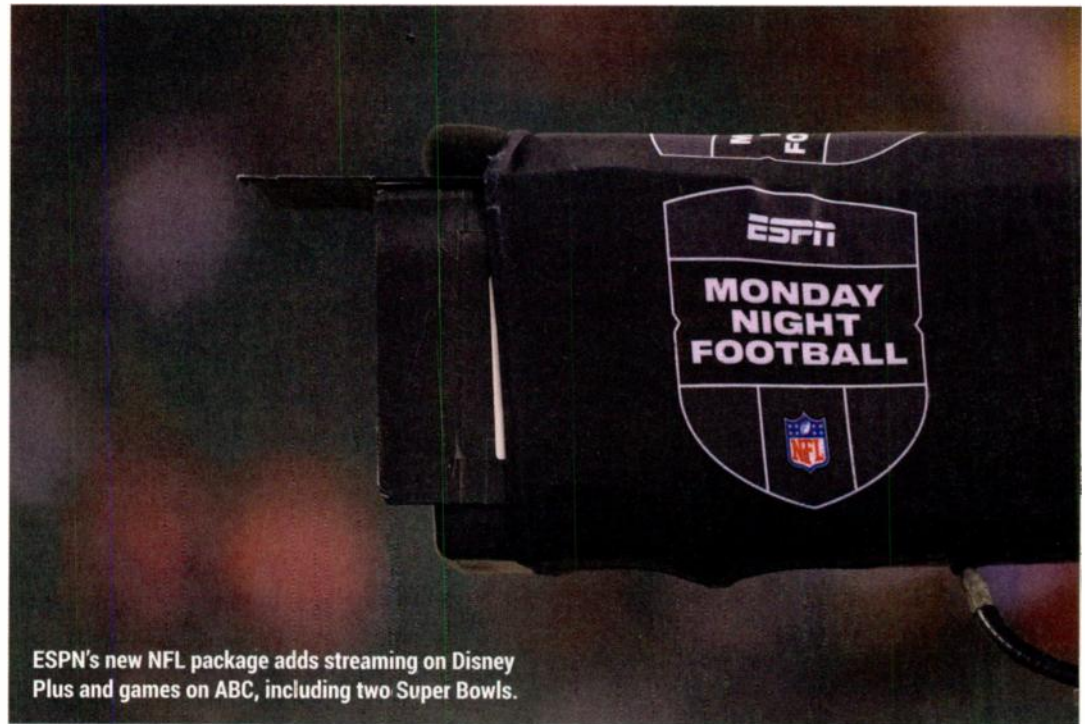
Will Streaming Ties Bind to Pay TV?

Some of the broadcast streaming services are expected to require viewers to have either a higher-tier subscription or a pay TV package that can be authenticated by the streaming service in order to access games. Those dynamics aren’t abundantly clear at the moment, though. According to some reports, subscribers to Paramount Plus’s lowest tier — priced at \$4.99 per month — will get access to NFL games.

Kagan senior research analyst Justin Nielson said if streaming customers are essentially getting the games as part of their regular or even free packages, that could diminish the value of the NFL rights in the eyes of distributors.

“The exclusivity of the Sunday broadcast games for stations is diminished if it is also available for streaming,” Nielson said. “It will be interesting to see if the major TV-station owners push back on increases in reverse retrans payments to the networks as traditional multichannel subs decline as more viewers move to streaming.”

LightShed Partners partner and senior analyst Rich Greenfield, who has long predicted the end of the traditional cable bundle, said in a note to clients that the NFL deal could be the



ESPN's new NFL package adds streaming on Disney Plus and games on ABC, including two Super Bowls.

SPORTING GOODS

Even without the new NFL deal, most cable operators have had to raise their broadcast surcharge fees to keep up with retrans increases. The figures are averages and vary by market.

	BROADCAST SURCHARGE		% CHANGE
	2020	2021	
COMCAST	\$14.95	\$19.45	30%
CHARTER	\$13.50	\$16.45	21.5%
ALTICE USA	\$9.99	\$9.99	0%
COX	\$13.50	\$16.00	18.5%

SOURCE: Published reports; Kagan, a unit of S&P Global Market Intelligence

RETRANS RISING

Kagan estimates that retrans payments to broadcasters will rise at about a 1.4% compound annual growth rate in the next three years.

	2020	2021	2022	2023	CAGR
RETRANS FEES (\$ billions)	\$12.2	\$12.4	\$12.6	\$12.9	1.4%

SOURCE: Company reports and MoffettNathanson estimates and analysis

final nail in linear TV’s coffin. But it also could spell the ultimate demise of retrans, he added.

“With more and more NFL content available outside the bundle, the legacy multichannel bundle will evaporate even faster than expected (cord-cutting) and the ultimate subscriber floor will be lower than anyone thought possible before,” Greenfield wrote.

While Fox doesn’t have a direct-to-consumer streaming service yet, Greenfield added that the new NFL deal could provide the catalyst to launch a subscription tier of its Tubi streaming service that includes the NFL games.

Loss of Leverage

As more and more viewers migrate to streaming, that should materially affect station leverage over distributors, Greenfield continued.

“In turn, retrans should stop growing and eventually start to decline, especially when you layer in that all the most compelling general entertainment TV programming is now flowing to direct-to-consumer streaming platforms vs. the legacy multichannel bundle,” he wrote. ●



Octopus Hails Nielsen For In-Uber Ratings

Ride-share cars are preview for autonomous vehicles



By Jon Lafayette
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Octopus, a venture-backed technology company with a network of interactive video screens in 15,000 Lyft and Uber cars, has made a deal to be included in Nielsen's Digital Content Ratings, starting in the second quarter.

Octopus already sells ads to Fortune 500 firms based on its own first-party data, but Nielsen will provide verification, now and in the not-too-distant future when cars drive themselves and the people in them watch television.

"We're very bullish that there will be a world of autonomous vehicles," said Octopus co-founder and CEO Chierian

Thomas. "We're not there yet, but we feel it's going to go from rideshare to robotaxis to autonomy. And so rideshare is really our entry point into in-car entertainment."

Octopus sees itself as an ad-supported VOD platform inside rideshare vehicles. The content is delivered via LTE, and data about viewers comes back every two minutes. Octopus is working with Sinclair Broadcast Group to utilize ATSC 3.0 as well. Sinclair led a \$10.3 million funding round for Octopus in 2019.

In Talks With Carmakers

Thomas said Octopus is having discussions with the automakers as they get ready to market their self-driving models.

"Our audience loves Tesla and skews extremely high for electric vehicle

Octopus screens show ride-share passengers play-along games, as well as commercials.

ownership, so [vehicle makers] want to reach them," Thomas said. Some of those automakers are going to make vehicles designed to be better for ride-share and they all have screens. "That's what we're working on now and we'd like to power those screens," he said.

In the meantime, Octopus is selling ads targeting a captive audience. Its screens show commercials and play-along games that let riders win money. Its data says its viewers are young, with 76% between the ages of 18-49, and they over-index on income.

"We hit the sweet spot consumer that's hard to reach because they're on the go," Thomas said, and 72% are cord-cutters. "These are the folks that you're not reaching via traditional ad placements."

Octopus is particularly attractive to advertisers because it embeds a sensor into each in-car device that reads how many humans are in front of it watching the content. The advertiser is charged only for those verified viewers.

Being part of Nielsen's Digital Content Ratings will make Octopus look more like a video service than a billboard to advertisers.

Plenty of Data

"We present the first-party data to clients and they've been very impressed," Octopus chief revenue officer Bennett Fogel said. "We send back data on every single engagement, every interaction, every click-through. It's so engaging. Now having the third-party verification from Nielsen will make it a lot easier to move those video budgets."

Thomas said the company recently turned cash-flow positive and expanded into more markets.

"We know we can make more money than we spend and we've found that there's a huge demand to reach this audience in a captive setting," he said. "Outside of in-flight entertainment and maybe movie-theaters, you're rarely getting sight, sound and motion and a captive audience. Now it's really just about scaling it up." ●

At Odds With Amazon, Peacock Urges 'Sideloading'

Year-old NBCU app still lacks support on No. 2 streaming platform Fire TV



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Nearly a year after NBCUniversal's Peacock network was first introduced on Comcast Xfinity X1 and Flex devices and nine months after it rolled out nationwide, the Peacock app still isn't supported by Amazon Fire TV Stick and other Amazon Fire TV gadgets.

As the impasse with Amazon, the No. 2 provider of OTT devices behind Roku, drags on, Peacock reps have started to advise customers to "sideload" the Peacock app onto Amazon Fire TV, a term for installing an unauthorized third-party app onto the device. That task is actually not so technically complicated, given Fire TV's underpinning in Google's Android TV operating system.

This communication has been accentuated with the debut of WWE-related programming on Peacock in March.

"Thanks for reaching out! We understand your frustration," NBCU is telling customers through its @peacocktv Twitter handle. "While Peacock currently isn't supported on Amazon devices, there are sideloading options that customers have found helpful."

Comcast chairman and CEO Brian Roberts hinted at an investor event earlier in March that his company's NBCU division might be getting close to hammering out an agreement with Amazon for support of Peacock on Fire TV.

Comcast, NBCU and Amazon have not elaborated on their negotiating hangups. But they reportedly center on NBCU's desire not to have Peacock disaggregated within Amazon Prime Video Channels. NBCU wants to distribute Peacock as a standalone app, controlling the customer relationship and all the related data itself.

Peacock's Twitter account has advised users to "sideload" the Google TV app onto Fire TV devices.

Advising customers on unofficial workarounds might not necessarily convey desperation on behalf of Peacock and NBCU, but it could hint at concern and frustration.

With reports circulating in February that the streaming service only has around 11.3 million regular users, and NBCU constrained on what it can spend on splashy content relative to competitors with deeper pockets, Peacock appears anxious to goose its usage metrics.

Certainly, making Peacock available to Fire TV living rooms would help. Just look at HBO Max, which has grown from 8.6 million customers to more than 17.2 million since gaining access to both Amazon Fire TV and Roku late last year.

Roku is the fastest-growing device ecosystem thanks to its relationships with TCL and Hisense, which both use the Roku OS to power most of the smart TVs they sell worldwide. But Amazon actually sells more Fire TV devices these

days, starting with the low-priced Fire TV Stick HDMI gadget. In fact, Amazon shipped 13.2 million Fire TV devices worldwide in the fourth quarter, controlling more than 12% of the OTT device market, according to Strategy Analytics. ●



U.K.'S AMINO AIMS FOR NORTH AMERICAN TRACTION

AMINO TECHNOLOGIES, a key U.K.-based technology shop backing the proliferation of Android TV operator tier set-top solutions across Europe, says its North American presence is "accelerating."

The Cambridge, England-based vendor now touts a list of 14 small North American pay TV operators for its tech, which includes AminoOS middleware, the Amigo 7X Ultra-HD set-top, and the Amino Engage SaaS (software as a service) management

solution. Amino said its client list includes AW Broadband, Conway Corp., Hay Communications and Home Telecom, which each agreed to endorse the company in a statement intended to boost its fortunes across the pond.

"A crucial element of our transition from legacy video to IPTV is to make sure that existing subscribers who may have little or no experience with streaming services are still able to

adopt our new platform successfully," said Jason Hansen, chief technology officer for Arkansas-based Conway, which uses Amino tech in its ConwayCorpTV service.

"Launching Android TV services has opened up a new level of possibility for some of our more traditional customers," added Caoimhe Zett, customer marketing supervisor for Charleston, N.C.-headquartered Home Telecom, which uses Amino in its HomeStream TV offering.

Amino touts 250 million customers

worldwide across 65 countries. The company says its technology powers 10 million devices.

Amino also references T-Mobile, Cincinnati Bell and Consolidated Communications on the "customers" page of its website.

"Consumers are looking for easy access to content, wherever it is, and intuitive UIs that are simple to navigate," Amino Group CEO Donald McGarva said. "At the same time, operators want a flexible, cost-effective route to modernizing their services with OTT content, while managing the consumer experience." — DF



TVision Fades to Black, a Sign of Pay TV Uncertainty

T-Mobile's surrender is a landmark defeat for traditional platforms



By Alan Wolk
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In years to come, T-Mobile's decision to shut down its TVision linear-TV service just five months after launch may be cited as the canary in the coal mine, signaling a more rapid decline for traditional linear pay TV.

Yes, there were specific problems. T-Mobile somehow forgot to ask companies like Discovery if it could put its various networks on the lower-priced version of the app (something even the most junior lawyer should have flagged). The fact that MobiTV, which built the underlying platform for the app, filed for Chapter 11 bankruptcy protection did not help much either. And of course 5G — fixed 5G to the home, to be exact, the original *raison d'être* behind TVision — has yet to materialize in a major way and probably won't any time in the foreseeable future.

But mostly, the reason TVision seemed to fail is that no one needs yet another full-on linear pay TV service, virtual or otherwise.

Too Much to Watch

With nine multibillion-dollar subscription video-on-demand "Flixes" up and running, along with about as many Free Ad-Supported Streaming Television (FAST) platforms and dozens of niche services, consumers are figuring out that there's more and better programming on streaming than on traditional cable — all for considerably less money.

So the push is going to be to move away from traditional pay TV, not



towards it. That said, there are several things still keeping consumers from cutting the cord.

The first is inertia. While many viewers are indeed unhappy with their current pay TV packages, many are not. All the talk about the "massive wave of cord-cutting" causes us to forget that something like 75% of U.S. households still subscribe to pay TV.

Inertia can only take you so far, though, and as production picks back up and the buzz about what to watch increasingly becomes about what's on streaming, viewers who were previously thrilled to have hundreds of cable channels to click through are going to be feeling major FOMO about all those streaming channels they don't have.

Then there's news and sports.

Right now, there's no real way to watch CNN unless you have a pay TV subscription. Yes, many of the FASTs have a CNN channel with fairly recent clips on it, but it's not the linear cable network.

Tubi and Amazon have both been working to curate news offerings — both have gone heavy on local news by

T-Mobile pulled the plug on its TVision MVPD after marketing it for just five months.



working with players like Hearst TV and Tegna — and apps like Haystack also offer local news. But it's not the full four-affiliate local news play that many viewers, older viewers in particular, are used to.

That should change over the next year or two as more local broadcasters make the move to streaming, at least for their news content, and should AT&T find a buyer for CNN that can figure out streaming distribution.

Sports is an even bigger hurdle, at least for now. The result is that fans are reluctant to cut their ties with cable, lest they be left unable to watch their favorite teams. That is changing though, slowly but surely.

The National Football League's new 11-year media rights deal gives Thursday Night Football exclusively to Amazon starting in 2023 and allows ABC, CBS and NBC and Fox to stream the games they have the rights to, even the Super Bowl. So ESPN Plus, Paramount Plus and Peacock are in luck.

RSNs: The Last Holdouts

That still leaves localized regional sports network fans, who may have some salvation coming next year when Bally's and Sinclair Broadcast Group launch apps for the former Fox RSNs which, thanks to the Bally's sponsorship, should be fairly reasonably priced. But those networks are in just 19 markets, not the whole country, so a lot of fans will still be tied to cable. For now, anyway. This brings us back to T-Mobile and TVision.

T-Mobile likely gave up on TVision because they realized there wasn't a market for a full-bore virtual pay TV service anymore. After a nice run-up, the vMVPDs had sort of stalled out. If anyone was going to try to give up pay TV, it was the people paying for it monthly and not the ones with the two-year triple-play deals.

That's not to say pay TV is going to implode tomorrow, or even next year or three years from now. Rather, look at T-Mobile's surrender as TV's Stalingrad — the moment the tide turned inexorably in the opposite direction. ●

Broadband Infusion In Biden Plan Faces Challenges

Muni cable, speed requirements and wireless role add legislative hurdles



By Gary Arlen
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Although broadband proposals occupy only four paragraphs in the White House's 25-page summary of President Joe Biden's "American Jobs Plan" — the official name for the "infrastructure overhaul" unveiled March 31 — those high-level visions immediately generated intense controversy regarding their implementation. Analysts expect heated economic and political furor as the \$100 billion proposal for federal support of broadband expansion, including funding for municipal broadband systems, high-speed mandates and possible price controls, works its way through Congress.

One key goal of the plan is to assure universal broadband access, especially high-speed availability to unserved rural and underserved urban areas. 5G technology will be part of that solution, but the initial vision did not address specifics for wireless delivery in the master plan.

Even before Biden formally unveiled the proposal at a Pittsburgh speech — in the heart of old rust-belt America — Republicans vowed to slash the \$2.2 trillion concept to focus on roads, bridges and broadband projects, and not allow it to cover the climate, energy and "social infrastructure" ideas that Biden espoused. A second phase of the Biden infrastructure agenda, labeled the American Family Plan, was due to be released in April, also calling



President Joe Biden boards Air Force One ahead of a trip to Pittsburgh, where he would introduce his "American Jobs Plan."

for \$1 trillion to \$2 trillion in government funding during the coming decade.

Since the entire infrastructure plan includes corporate tax increases, it faces severe challenges as it heads to Congress.

The broadband proposal's congressional journey actually began in the last two months with the introduction of legislation that will become part of Biden's plan: House Majority Whip James E. Clyburn (D-S.C.) introduced the Accessible, Affordable Internet for All Act (AAIA), which seeks to invest \$94 billion to build high-speed broadband infrastructure in underserved communities, and all 32 Democratic members of the House Energy and Commerce Committee are co-sponsoring the Leading Infrastructure For Tomorrow's America (LIFT America) Act, which includes broadband modernization and expansion in its proposed \$312 billion spending for energy, water and health-care infrastructure programs.

The "digital" section of the Biden plan focuses on eliminating the digital divide. It also encompasses tech-related research projects to assure American innovation, some of which could become intertwined with expanded broadband or wireless services.

'Revitalize Digital Infrastructure'

Biden cited data indicating that "more than 30 million Americans live in areas where there is no broadband infrastructure that provides minimally acceptable speeds," emphasizing the limitations in rural areas and on tribal lands.

"In urban areas as well, there is a stark digital divide: a much higher percentage of White families use home broadband internet than Black or Latino families," Biden said. The proposed \$100 million investment will "build high-speed broadband infrastructure to reach 100 percent coverage," Biden added, noting that the plan will "future-proof" broadband infrastructure.

One way to accomplish that is to "prioritize support for broadband networks owned, operated by, or affiliated with local governments, nonprofits, and cooperatives — providers with less pressure to turn profits and with a commitment to serving entire communities," the plan said.

Piling on ideas that have traditionally annoyed incumbent telecom companies, Biden focused on price regulation, noting that Americans "pay too much for internet service." He cited the need to "reduce the cost of broadband internet service and promote more widespread adoption." The White House policy paper said: "building out broadband infrastructure isn't enough. We also must ensure that every American who wants to can afford high-quality and reliable broadband internet."

That goal will be achieved by "lifting barriers that prevent municipally-owned or affiliated providers and rural electric co-ops from competing on an even playing field with private providers, and requiring internet providers to clearly disclose the prices they charge," according to the plan.

Biden sought to temper this approach by assuring that individual subsidies to cover internet costs will not be a permanent policy. “Continually providing subsidies to cover the cost of overpriced internet service is not the right long-term solution for consumers or taxpayers,” according to the White House.

Opposition Takes Shape

Even before the Biden plan was released, Congressional Republicans announced that they’d only work on legislation that focused on transportation and broadband, not other Biden aspirations such as climate and family care factors.

“I don’t think the bill can grow into a multitrillion dollar catch-all,” said Rep. Sam Graves (R-Missouri), the top Republican on the House Transportation and Infrastructure Committee. “It needs to be about roads and bridges.”

The need for speed fits into many of the initial analyses of the plan, along with an evaluation of whether the overall broadband agenda is good for incumbent carriers or entrepreneurial interlopers. Critics are already speculating incumbent carriers will seek to tailor the eventual legislation to assure their stake in the funding—possibly to the exclusion of entrepreneurial ventures.

Craig Moffett, principal and senior analyst at research firm MoffettNathanson and a long-time media/telecom analyst, said in an interview that the Biden plan “still feels very much like a provisional first draft at this point.”

“There are some problematic elements, like the symmetrical bandwidth standard,” he said. “On balance, funding to bring broadband to more of America is good news for existing operators.”

Others questioned whether ideas such as the bidirectional requirement for speeds of 100 megabits per second or 1 gigabit per second should be enshrined in the plan, as proposed by former Federal Communications Commission chairman and Brookings Institute visiting fellow Tom Wheeler. In Congressional testimony in March, Wheeler suggested that symmetrical



“I don’t think the bill can grow into a multitrillion dollar catch-all. It needs to be about roads and bridges.”

— Rep. Sam Graves, (R-Missouri), top Republican on the House Transportation and Infrastructure Committee

NCTA president and CEO Michael Powell said the Biden plan risks a big “wrong turn” by discarding decades of policy.

1 Gbps service is a necessity, even if it requires a long-term funding subsidy.

Wheeler, who had a hand in crafting the Biden plan, said it is a “work in progress.” He believes it should be rolled out as a “Fiber First” project, based on FCC studies, an interesting perspective from the lobbyist who once headed CTIA-The Wireless Association. He said the rural prioritization should be about adoption, not just deployment. In that context, he said, price matters to assure that low-income users can afford high-speed access.

NCTA-The Internet & Television Association president and CEO Michael Powell quickly voiced opposition to government-built broadband subsidies or price regulations. He said the White House’s plan risks making a big “wrong turn” by “discarding decades of successful policy” that is subsidizing hard-to-reach and low-income residents. Powell insisted Biden’s plan is shortsighted in believing “the government is better suited than private-sector technologists to build and operate the internet.”

ACA Connects president and CEO Matthew M. Polka also warned that “more deployment alone will not bridge the digital divide” and insisted that recent federal pro-investment policies have encouraged private-sector expansion of broadband services.

“As we go forward, we should ‘do no harm’ and not undermine these investment incentives,” Polka said. He acknowledged “adoption,” not deployment, is a major challenge.

Michael O’Rielly, principal at MPORielly Consulting and a

former FCC commissioner, said the Biden proposal “is based on faulty premises and seems to advocate for indefensible and harmful policy directions.”

“It dismisses calls by many, including myself, to focus on those Americans without broadband service—those truly in need—and charges ahead with a costly, unnecessary, and detrimental proposal that would assault current private broadband providers’ investment and putting at risk all existing federal broadband programs,” O’Rielly said.

View from Pew Center

The Pew Research Center, which has followed internet and technology developments, focused on the high data speed goals of the infrastructure plan.

“No matter how this legislation shakes out, lawmakers should set higher speed requirements, prioritize fiber deployment, establish accountability and oversight measures for funds, and address affordability,” said Kathryn de Wit, project director of the broadband access initiative at The Pew Charitable Trusts, adding that it’s critical for federal law to address the role of state and local governments.

Randolph May, president of the Free State Foundation, a telecom-focused think tank, endorsed the infrastructure proposal, but voiced concerns that “the plan will not direct funds primarily to unserved areas. The bulk of any funding should go to areas that do not yet have broadband service.” He also is wary about how “broadband will be defined.”

Consumer Technology Association president and CEO Gary Shapiro Association focused on the importance of building broadband infrastructure, including “dig once” policies to free up spectrum for innovators.

John Lawson, president of Convergence Services and executive director of the AWARD Alliance, believes that the Biden infrastructure programs could seed the market for NextGen TV, citing the FCC’s “broadcast internet” rulemakings as supporting this prospect. He noted that “innovative broadcasters” are working on connected car projects using ATSC 3.0 technology. ●



People

Notable executives on the move



CABLE ONE

Megan M. Dietz will join Cable One in Phoenix as senior VP, human resources. She is senior VP of human resources & administration at Hargray Communications, which Cable One will acquire in the second quarter of 2021.



CHARTER

Charter Communications has upped **Alison Hellman** to senior VP of content, strategy and marketing for Spectrum Networks. The former Madison Square Garden Co. and Rainbow Media executive had joined Charter in 2016 as group VP, marketing.



COMCAST

Brenda Laboy has joined Comcast as VP of network engineering and construction for its Norcross, Georgia-based Big South region. The 16-year AT&T veteran had most recently been assistant VP of wireless and wireline construction in Los Angeles.



COX ENTERPRISES

Cox Enterprises in Atlanta has elevated **Deborah Lucy** to VP, associate general counsel, corporate law, responsible for leading the company's new corporate law Center of Excellence. She was AVP, associate general counsel, corporate and strategic transactions.



CROWN MEDIA

Maureen Barrett has been named director of talent relations & events at Crown Media Family Networks in New York, charged with centralizing and streamlining the Hallmark Channel parent's talent-relations function. She was president of That Girl Public Relations.



DELUXE

Lena Wasikowski has joined Deluxe in Los Angeles as senior VP, global account strategy and business development. She comes from WarnerMedia, where she had been VP of global client relations & content distribution.



'ENTERTAINMENT TONIGHT'

Nischelle Turner was named co-host of *Entertainment Tonight*, alongside current host Kevin Frazier. Turner has been an ET correspondent since 2014, will host the fall CBS series *Secret Celebrity Renovation* and is a CNN contributor.



EXTREME REACH

ER Payroll Solutions, an Extreme Reach division providing payroll, accounting and labor relations for production casts and crews, has hired **Kathleen Thompson** as head of production incentives. She was VP, sales and new business at GreenSlate.



FOX

Jeff A. Taylor has been promoted to general counsel at Fox Corp. Taylor, who joined Fox in 2019 as executive VP and chief litigation counsel, is a former deputy counsel and chief compliance officer at automaker General Motors.



FOX DEPORTES

Sergio Verdu has joined Fox Deportes in Los Angeles as VP of production. The 20-year media executive comes from ESPN, where he most recently was director of product development and new products overseeing global strategic production based on partner needs.



NEXSTAR

Nexstar Media Group has named **Peter Saiers** as news director of KTLA Los Angeles. Saiers, who had been news director at KING Seattle, succeeds Jason Ball, who had been KTLA's news director for 12½ years and announced plans to leave in February.



NIELSEN

Sandra Sims-Williams has been named chief diversity officer at Nielsen, replacing CEO David Kenny in that role. She joined Nielsen in January 2020 as senior VP, diversity and inclusion, after serving as chief diversity officer at Publicis Group.



SCRIPPS

Kate O'Brian has joined E.W. Scripps as head of news for its national television networks business, responsible for the news and programming strategy for Newsy and Court TV. O'Brian is a 30-year veteran of ABC News, finishing as senior VP for news.



SCRIPPS

E.W. Scripps has tapped **Evan Pappas** as VP and general manager of WFTX, the company's Fox affiliate in Fort Myers, Florida. He had been VP and general manager of Scripps-owned NBC station KOAA Colorado Springs since 2011.

BRIEFLY NOTED

Other industry execs making moves

Effects studio AFX Creative has promoted **Esther Minitser** to head of production. Also, AFX hired **Jessica Amburgey** as senior color producer and **Stefan Kim** as production coordinator. ... **Daniel R. Hesse** has been named as chairman of the board of Akamai Technologies, succeeding the retiring **Frederic V. Salerno**. Hesse is the former CEO of Sprint. ... Fox Corp. also tapped **Nicholas Trutanich** as executive VP and chief ethics & compliance officer. Trutanich is the former U.S. Attorney for Nevada. ... **Nilay Shah** was named executive VP and head of investor relations at Lionsgate. He comes from Citadel Global Equities, where he was technology, media and telecom (TMT) analyst. ... Ad-tech firm Simpli.fi has added **Lynda Clarizio** to its board of directors. She is a former president, U.S. media at Nielsen. ... **Betty Wong** was named chief financial officer at Velocity. She was VP of finance and operations at Unacast.



SESAME WORKSHOP

Wanda Witherspoon was named chief diversity, equity and inclusion officer at Sesame Workshop in New York, a new post. She had been the nonprofit children's television producer's VP of public affairs and special events.



TEGNA

Kristie Gonzalez has been elevated to VP, media operations, at Tegna. She will continue as GM of KVUE Austin, Texas, adding oversight of KYTX Tyler, Texas, as well as supervise recruiting across Tegna's 11 stations in the state.



VUIT

VUit, a streaming service featuring content from local TV stations, has named **Kevin Dunaway** as VP of affiliate relations and content development. He comes from WWTV in Traverse City, Michigan, where he was general manager.



WARNERMEDIA

Katrina Cukaj was named lead of ad sales and client partnerships at WarnerMedia, overseeing the go-to-market sales team and their agency and client relationships, including the upcoming ad-supported HBO Max offering. She was lead of marketing, creative and network partnerships.

Ad Meter

Who's spending what where

PROMO MOJO

Our exclusive ranking of the programming networks as promoting most heavily (March 22-28)



United States of AI, CBS

TV Ad Impressions: **274,664,190**
 Total TV ad impressions within all U.S. households, including national linear (live and time-shifted), VOD plus OTT and local

Est. Media Value: **\$3,245,710**
 Estimated media value of in-network promos

On the strength of 274.7 million TV ad impressions, a CBS promo for new Chuck Lorre sitcom *United States of AI* takes first place. The Eye Network also takes fourth place to plug crime drama *The Equalizer*. Cable networks round out our ranking, with HGTV building excitement for home-reno competition *Rock the Block* in second, Disney Channel serving up a PSA-like general network promo titled "Use Your Voice" in third, and TBS hyping game show *Wipeout* in fifth.

Visit nexttv.com for weekly Promo Mojo charts between print issues.

TOP 5 PROMOTIONS

- 1. United States of AI, CBS**
 TV Ad Impressions **274,664,190**
 Est. Media Value **\$3,245,710**
- 2. Rock the Block, HGTV**
 TV Ad Impressions **246,539,088**
 Est. Media Value **\$1,107,837**
- 3. 'Use Your Voice,' Disney Channel**
 TV Ad Impressions **242,511,678**
 Est. Media Value **\$1,830,690**
- 4. The Equalizer, CBS**
 TV Ad Impressions **225,528,900**
 Est. Media Value **\$2,846,684**
- 5. Wipeout, TBS**
 TV Ad Impressions **203,638,940**
 Est. Media Value **\$4,126,015**

BIG SPENDERS

Brands ranked by the greatest increase in TV spend (March 22-28)

1  **Apple AirPods**


Spend Increase:	307%
Est. TV Spend:	\$4.9M
Spend Within Industry:	91%
Top Network:	NBC

2  **Michelob Ultra Organic Seltzer**


Spend Increase:	144%
Est. TV Spend:	\$3.5M
Spend Within Industry:	10%
Top Network:	Telemundo

3  **SoFi**

Spend Increase:	116%
Est. TV Spend:	\$2.7M
Spend Within Industry:	15%
Top Network:	CBS

4  **IBRANCE**

Spend Increase:	112%
Est. TV Spend:	\$2.5M
Spend Within Industry:	30%
Top Network:	NBC

5  **GMC**


Spend Increase:	108%
Est. TV Spend:	\$10.2M
Spend Within Industry:	5%
Top Network:	CBS

MOST-SEEN TV ADS


Brands ranked by TV ad impressions (March 22-28)

1  **GEICO**


TV Ad Impressions:	1.68B
Est. TV Spend:	\$25.4M
Interruption Rate:	2.87%
Top Show:	NCAA Tournament

2  **Liberty Mutual**


TV Ad Impressions:	1.28B
Est. TV Spend:	\$6M
Interruption Rate:	1.98%
Top Show:	Fox & Friends

3  **Progressive**

TV Ad Impressions:	1.26B
Est. TV Spend:	\$20.2M
Interruption Rate:	2.24%
Top Show:	NCAA Tournament

4  **Domino's**

TV Ad Impressions:	1.22B
Est. TV Spend:	\$6.56M
Interruption Rate:	1.53%
Top Show:	Chicago P.D.

5  **TurboTax**

TV Ad Impressions:	1.11B
Est. TV Spend:	\$6.6M
Interruption Rate:	1.02%
Top Show:	NCIS

B+C'S MOST READ

Top stories on *broadcastingcable.com*, March 22-April 5

1. Changes at Sinclair's RSNs Just Start With Name Change
2. 'Pig Royalty' on Discovery Plus March 23
3. Supreme Court Overturns Third Circuit Smackdown of Broadcast Dereg
4. Tegna Launching Twist Digital Multicast Network for Women
5. Syndication Ratings: 'Jeopardy!' Drops Out of Game Lead

To read these stories, go to *broadcastingcable.com*.

HBO MAX SHOWS FASTEST SVOD UPTAKE IN LATEST HUB SURVEY

HUB ENTERTAINMENT RESEARCH has piled on its latest round of survey-based data asking the essential question, has video streaming increased in the pandemic? Why yes, it has.

But credit the Boston-based research company for going a little deeper in its latest report and illustrating just how much the streaming habit has accentuated over the one-year course of the lengthy social-distancing period — for example, 77% of

NEXT TV

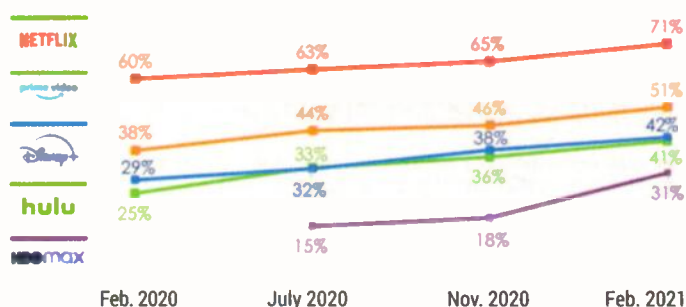
3,008 U.S. consumers age 14-77 said they're watching "significantly more" TV than they were before the pandemic vs. only 69% when Hub conducted a similar poll last July.

And the movement has been away from linear television. Only 62% of respondents said they subscribe to a traditional linear pay TV service vs. 72% in July 2020. (Over the same nine-month timeframe, 21% said they have a virtual pay TV provider vs. 17% earlier.)

Uptake for all the major SVOD services is up, but none more than for HBO Max, with 31% of respondents saying they now carry the \$14.99-a-month service vs. just 15% in July.

The bad news for the most expensive SVOD service: HBO Max is mentioned by survey respondents as the first service they'll quit once the pandemic finally ends, with 17% signaling their intention to do so. Hulu (15%) and Discovery Plus (14%) are also listed among the more expendable. WarnerMedia is developing a lower-cost, ad-supported version of HBO Max to address some of that concern. — Daniel Frankel

Do you currently subscribe to any of these TV services?



SOURCE: Hub Entertainment

For more stories like this, go to *nexttv.com*.

STICKIEST SHOWS *Top 10 cable programs ranked by viewer engagement**



Stickiness Rank	Ratings Rank	Telecast (Week Ending June 14)	Network	Stickiness Index*
1	155	Mystery 101: Killer Timing	Hallmark Movies	113
2	152	Chasing Waterfalls	Hallmark Channel	29
3	145	Tyler Perry's Sistas	BET	119
4	144	The Walking Dead	AMC	115
5	144	The Curse of Oak Island	History	38
6	143	90 Day Fiance	TLC	53
7	139	When Calls the Heart	Hallmark Channel	44
8	138	Genius: Aretha	Nat Geo	116
9	136	Tyler Perry's The Oval	BET	132
10	135	La Rosa de Guadalupe	Galavisión	899



The Stickiness Index looks at viewer engagement based on several factors. A higher number indicates more of the audience is tuned in for the duration of the telecast. * TV Engagement ratings powered by Comscore's TV Essentials. (Sorted by social media activity.)

STICKIEST SHOWS Top 10 broadcast programs ranked by viewer engagement*



Stickiness Rank	Ratings Rank	Telecast (Week Ending March 21)	Network	Stickiness Index*
1	150	<i>Enamorándonos</i>	UniMas	154
2	81	<i>Vencer El Desamor</i>	Univision	146
3	3	<i>The Voice</i>	NBC	141
4	5	<i>FBI</i>	CBS	140
5	2	<i>NCIS</i>	CBS	140
6	110	<i>La Hija Del Embajador</i>	Univision	140
7	6	<i>Chicago Fire</i>	NBC	139
8	128	<i>Buscando a Frida</i>	Telemundo	136
9	76	<i>Mira Quién Baila All Stars</i>	Univision	136
10	9	<i>FBI: Most Wanted</i>	CBS	134

comscore The Stickiness Index looks at viewer engagement based on several factors. A higher number indicates more of the audience is tuned in for the duration of the telecast. * TV Engagement ratings powered by Comscore's TV Essentials. (Sorted by social media activity.)

THE BINGE REPORT

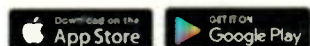
THE WEEK OF MARCH 22

TV Time users track the shows they're watching on TV via the TV Time app. That data is then used to determine the most-binged shows of the week in the U.S.



1	<i>Modern Family</i>	Peacock/Hulu	Share of binges: 1.68%
2	<i>Solar Opposites</i>	Hulu	Share of binges: 1.41%
3	<i>Grey's Anatomy</i>	Netflix/Hulu	Share of binges: 1.27%
4	<i>Criminal Minds</i>	Netflix/Hulu	Share of binges: 1.12%
5	<i>Superstore</i>	Peacock/Hulu	Share of binges: 1.10%
6	<i>Schitt's Creek</i>	Netflix/Prime Video	Share of binges: 1.08%
7	<i>Attack on Titan</i>	Netflix/Hulu	Share of binges: 1.07%
8	<i>One Piece</i>	Netflix/Hulu	Share of binges: 0.84%
9	<i>WandaVision</i>	Disney Plus	Share of binges: 0.81%
10	<i>Ginny & Georgia</i>	Netflix	Share of binges: 0.72%

Networks reflected don't include every viewing platform available or total viewing in share of binge.



To receive "The Binge Report" and other TV Time reports, visit www.whipmedia.com/subscribe/



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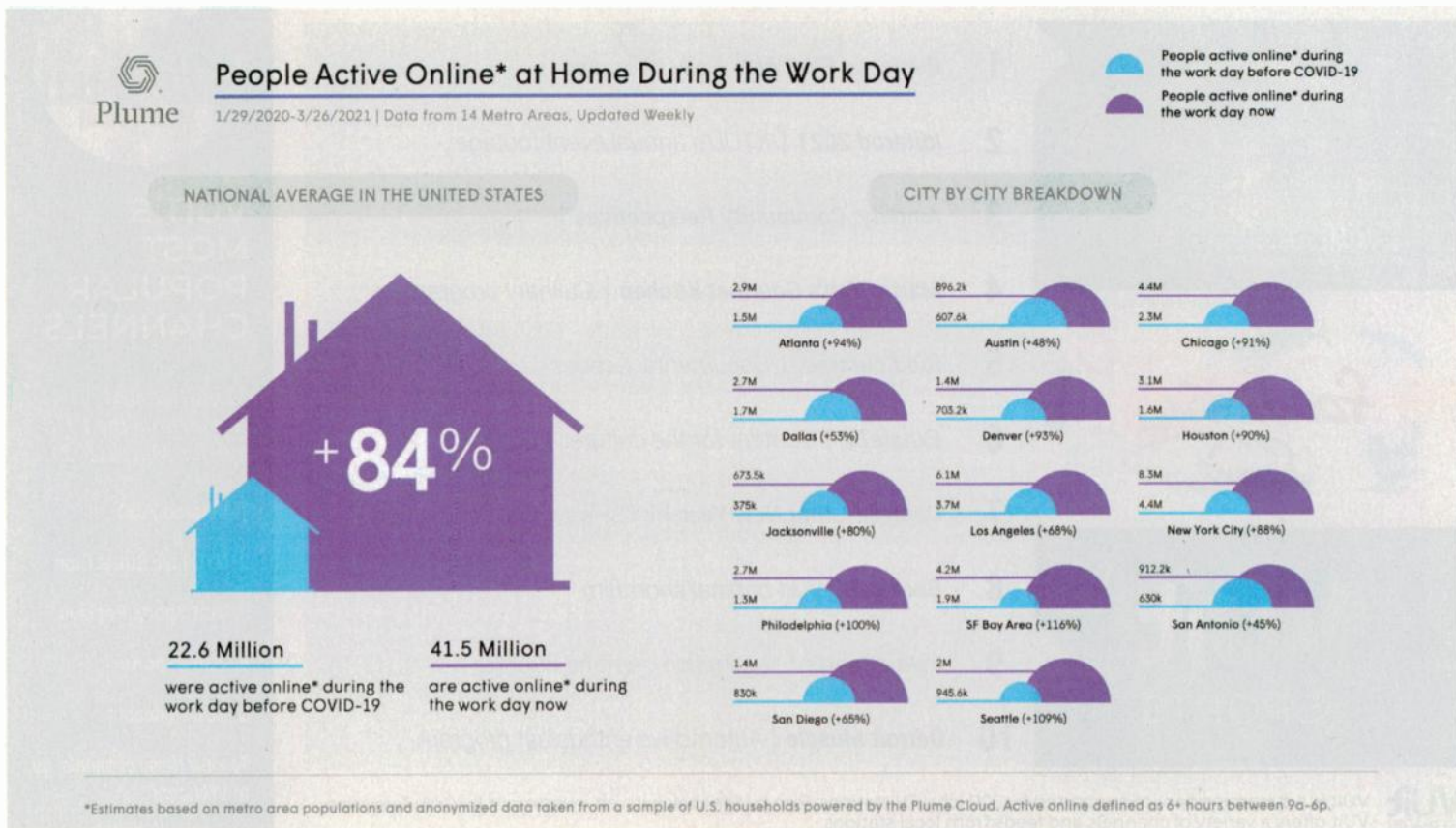
VIZIO Most-Watched Shows on TV in March



Of all the live, linear minutes watched by VIZIO smart TVs in March, 2.95% of the time was spent watching the 2021 NCAA Men's Basketball Tournament. See what other shows captured the most watch-time* in the graphic below



Via Vizio's Inscope, the TV data company with insights from a panel of 17 million active and opted-in smart TVs. Data is linear, live TV only and includes all episode types (new and reruns). Rankings are by percent share duration, defined as "of all the live, linear minutes watched last week, X% of the time was spent on show Y"



VUIT'S MOST-WATCHED STATION FEEDS *Top 10 local broadcasters streamed on the VUit app*

Rank	Station	Location	Network	What news event drove tune-in?
1	KTSF*	San Francisco-Oakland-San Jose	Lincoln Broadcasting	
2	WFMZ	Philadelphia	Maranatha Broadcasting	
3	WAFB	Baton Rouge, Louisiana	Gray Television	
4	WWTV	Traverse City, Michigan	Heritage Broadcasting	
5	WAFF	Huntsville-Decatur, Alabama	Gray Television	
6	WKYT	Lexington, Ky	Gray Television	
7	KTUU	Anchorage, Alaska	Gray Television	
8	WALA	Mobile-Pensacola, Florida	Meredith Local Media Group	
9	WBRC	Birmingham, Alabama	Gray Television	
10	WYMT	Lexington, Kentucky	Gray Television	

*Most out-of-market

STREAMED CONTENT *The top 10 most viewed pieces of content*



- Business First AM** | Daily news series
- Iditarod 2021** | KTUU's annual event footage
- Amplify: Community Perspectives** | Local station features
- Martin Yan's Gourmet Kitchen** | Culinary program
- food.curated.** | Documentary series
- ExhaleTV** | Content for the culture
- Chinese Lunar New Year** | KTSF's annual celebration
- Backlash** | VUit original short film
- VUit eSports** | Original on-demand eSports
- Detroit Muscle** | Automotive enthusiast program



VUIT'S MOST POPULAR CHANNELS

Most streamed channels on the VUit app for March 2021

1. Iditarod 2021
2. NYC Live Street Cam
3. VUit Sports Replays
4. VUit eSports
5. VUit Podcasts

To view these channels, go to VUit.com

VUit LIVE LOCAL FREE VUit is a streaming service supported by 200 local TV stations. Run by Syncbak with an investment by Gray Television, VUit offers a variety of channels and feeds from local stations.



By David Smyth
@YouLook.tv

Not So FAST: AVOD's Engaging Advantage

Why all advertiser-backed OTT platforms aren't the same

The rise of internet-delivered TV has produced an explosion of new services in the United States, and we're beginning to see the same in the United Kingdom. Acronyms like AVOD and FAST are now part of our daily jargon, but occasionally they seem interchangeable. To some degree, that's understandable as AVOD can also sometimes be offered alongside FAST, but that doesn't mean they're the same. And for reasons I'll explain, it's important to understand the difference.

Crucial Differences

Where AVOD (advertiser-supported video-on-demand) is a purely on-demand experience, FAST (free, ad-supported streaming TV) mimics the linear TV experience. What unites these two platforms is the means of delivery (internet) and that they are both free and ad-supported. To make matters more confusing, both can target niche audiences. But the critical difference is that one requires the viewer to take the lead and choose what they're going to watch and when, while the other does not. AVOD invites the viewer to become an active participant, while FAST openly declares itself to be a "lean back" experience.

This distinction matters because one



of the key reasons that digital video advertising has continued to grow in spite of the pandemic's chilling effect is its ability to reach specific audiences in a way that traditional TV advertising cannot — that is, in a way that actively engages the viewer. There is nothing new in the notion that advertisers want

David Smyth, a former 20th Century Fox and BSkyB exec, is founder and CEO of YouLook.tv, a new AVOD platform in the U.K. and Ireland.



AVOD invites the viewer to become an active participant, while FAST openly declares itself to be a 'lean-back' experience.

to reach engaged audiences and they'll pay a premium for higher levels of engagement. So when we turn our thoughts to the difference between AVOD and FAST, AVOD services clearly come out on top in terms of engagement.

But let's back up a bit. FAST channels were born largely out of Americans' desire to cut the cord (and save a ton of money in doing so) while maintaining the feel and massive amount of choice that linear cable subscriptions provided. It wasn't quite the same here in the U.K., however, as we never really reached the same level of cable penetration as seen in the U.S., and we already had a lot of free TV options.

But like the U.S., the U.K. has seen the uptake in OTT services explode. The volume of views on OTT services has risen nearly 50% year-over-year. Still, AVOD choices are few here and most free VOD is catch-up content provided by broadcasters and therefore limited. AVOD that offers a wider range of genres, or specific niche content, like IMDbTV, Fubo and Tubi in the US, are ripe to take off in the UK. A recent survey revealed that the majority of UK consumers (60%) say they would watch ads to be able to access content for free. And according to a Valassis study, 54% of consumers 25-54 said that ads on streaming services were more relevant than those on traditional networks.

Customization Is Key

So while it's likely that U.K. viewers will embrace FAST and AVOD, or hybrids therein, as audiences have in the U.S., the success of these platforms will come down to the ability to capture and keep viewers engaged and advertisers happy. When our team at YouLook.tv set out to build a better AVOD for the U.K., we recognized that quality content curated for the U.K.'s diverse audiences would be key to the advancement of ad-supported services here. Overall, the on-demand environment is better suited to provide viewers with a more customized experience while also providing advertisers with a way to reach those "lean forward" viewers in a credible, relevant way. ●

Michael Rucker

Executive Producer, truTV's 'Fast Foodies'

Cooking competition has well-known chefs recreate celebrities' faves

Fast Foodies is an engaging, low-stakes kitchen competition show finishing its first season on truTV on Thursday, April 15. Three accomplished chefs — Kristen Kish, Jeremy Ford and Justin Sutherland — recreate favorite fast-food fare brought in by celebrity guests such as Joel McHale, Bobby Lee and Fortune Feimster. Later they take the essence of, say, a McDonald's Egg McMuffin and create new dishes in hopes of winning the Chomptionship Trophy. Guests like Andy Richter and Ron Funches help make it fun, joining in in the kitchen and sharing the mayhem. Executive producer and showrunner Michael Rucker's credits include *Project Runway*, *Top Chef Masters* and *Last Comic Standing*. He knows his craft and served up a series that's tasty and, in his words, "totally real." He chatted with Kent Gibbons.

What about this concept drew you in at the beginning? What drew me in was the fact that it was three chefs of a caliber that I respected, chefs who have their own restaurants, they weren't amateur chefs, and they all had a personal connection to fast food. I really

liked that fact that we were going to build the show where it was going to be entertaining and fun, but with some little notes of education about how some of this stuff is actually made. Also, I really like the fact that the food was very inclusive.

Did you learn anything surprising about these fast-food dishes? I did. I learned a lot from the chefs' respect level for actual fast food chains — how difficult it actually is to repeat dishes over and over and over again. And some of these flavor combinations are iconic, because they are really rooted in a lot of classical food combinations.

Are you a fast food fan yourself? I am. When I first moved to Los Angeles, I found Baja Fresh, and I was just like, this is amazing. Coming from Minnesota, there's not great Mexican restaurants, besides, like, Taco Bell and Taco John's, which I believe is only a Minnesota thing. But I'm definitely a fan.

If you were going to be a guest on the show, what dish would you bring in? Obviously having produced all of these and us hoping for a season two, I'm thinking about what I would actually



Fast Foodies executive producer Michael Rucker

bring. I really started thinking about this and I haven't had one for years, but I'm sort of like, 'I want to have one,' is an Arby's roast beef sandwich with the horsey sauce and their barbecue sauce. I'd do both sauces. There's something about the bun. And they actually also have amazing fries. I love their fries.

Did you have a favorite episode? I have favorite moments in every single episode, but I enjoyed a lot of the chaos of Bobby Lee. We knew that he was going to do the throwing the egg [to the chefs], and they had to answer questions, but we didn't know what he was going to ask. And then the chaos of cooking, like that [stove-top] fire really did happen, that was not planned. It was shocking and it was hilarious. Those are things that happen in the kitchen. ●

BONUS FIVE

What shows are on your watch list? *Fast Foodies* (natch), *Björnstad* (*Beartown*), *High Fidelity* (rewatching the near-perfect season — shame on Hulu for canceling this), *Last Week Tonight with John Oliver*.

What is your all-time favorite show? *Cheers*, *The Wire*, *Pardon the Interruption* (the best TV format created in the past 20 years), *My So-Called Life*.

What apps do you use the most? UCLA Mindful Meditation App, Instagram.

Favorite podcast? *How Did This Get Made?*, *Prince: Official Podcast*, *The Bill Simmons Podcast*.

Where would you like to visit on vacation? At this point in the pandemic, anywhere would be nice. Outside of seeing family, New Zealand, Japan, Sweden and returning to Africa are on the top of the list.

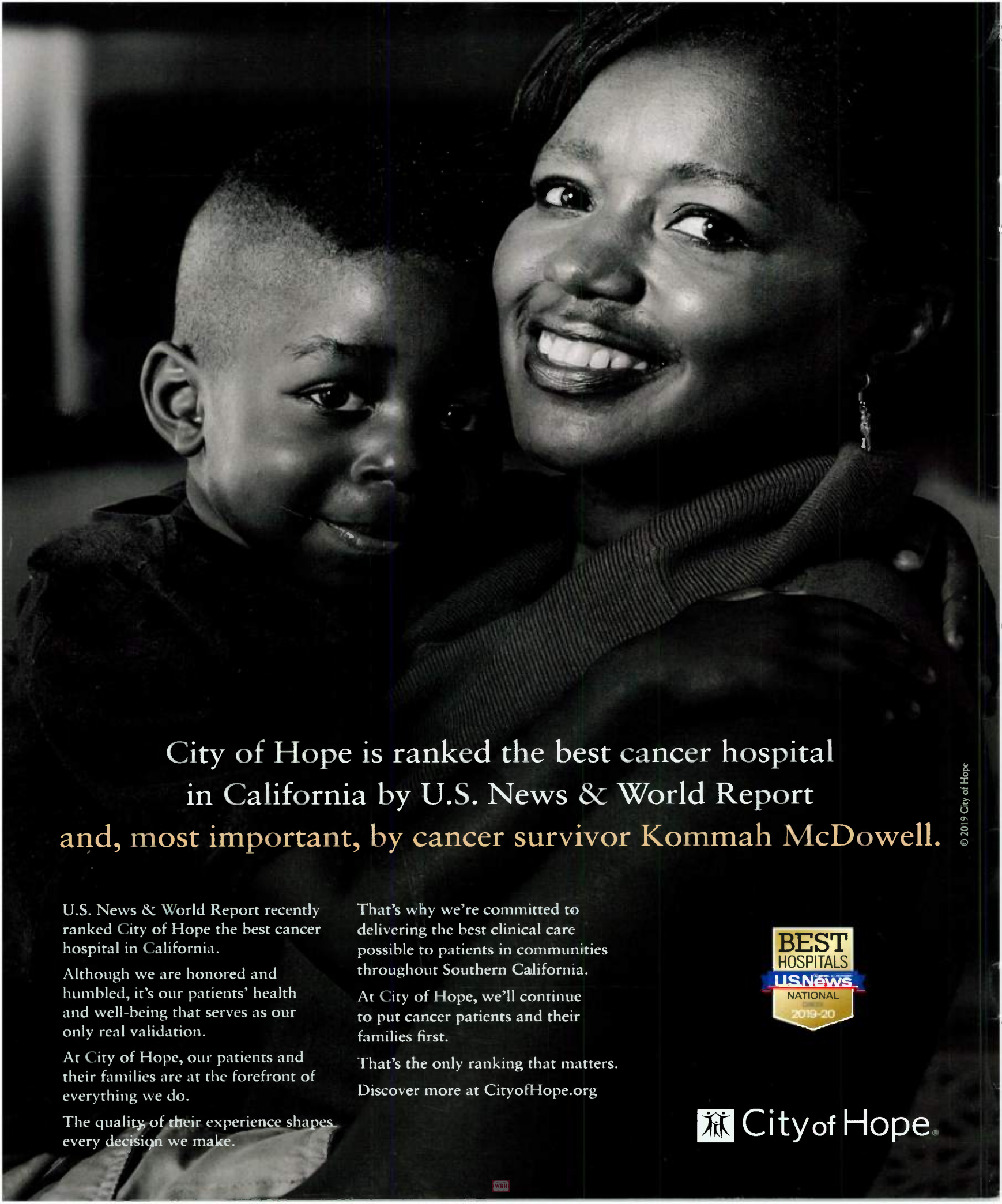
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