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WHAT THE INDUSTRY READS FIRST

Upfront Out Front: NBCU, Fox Corp. Make Their Pitches

Economic concerns may be in the headlines, but networks still pulled out all the stops for the splashy spectacle of the network upfronts Monday. With consumer confidence on the downswing, the pressure's on to get those ad dollars booked.

"There are economic headwinds, and we want to make sure that everyone is aware of the one thing that we have learned—brands who stay on the air are 98% more likely to retain their customers," **NBCUniversal** Chairman of Global Advertising & Partnerships *Mark Marshall* said during NBCU's Monday morning presentation at Radio City Music Hall. "There are three numbers I want you to remember about us this year... First, our reach will grow to 286 million people a month. And over 95% of that reach will be with your advertising. And 99% of those ads are seen to completion." He quipped that as part of the event, NBCU actually solved all the tariff issues, a nod to the market's rally after the U.S. and China announced they would temporarily slash tariffs.

Yes, Monday's upfronts had their usual glitz with A-list talent (including *Jamie Foxx* for **Fox Corp**.), comedians and, in the case of NBCU, a performance by *Snoop Dogg*. But along with the usual celebration of new programming, there was actual news mixed in. NBCU got the chance to talk about its plans for the return of the **NBA**, revealing *Michael Jordan* (who appeared by tape) will be a special contributor and that **Peacock** will make games interactive through features such as Peacock ScoreCard, described as "bingo meets fantasy sports"—letting fans choose a game card and earn points depending on what happens during a game. Fox Corp., which held its presentation in the afternoon, unveiled **Fox One** as the name for its upcoming streaming platform. And NBCU got to try out using the name **Versant** for the upcoming publicly traded company that will house most of its cable networks.

In true upfront fashion, we were reminded that signing talents' paychecks doesn't prevent them from roasting content companies. *Seth Meyers* suggested Versant sounded like the name of a drug in a pharmaceutical ad. "I think it's official—there are no good names left. Imagine being jealous someone beat you to **Tubi**," he joked. "The Late Night with Seth Meyers" host was unrelenting, suggesting upcoming theatrical "Wicked: For Good" could be reshot to work in Elphaba flying on a Swiffer or being melted with Aquafina water. "The industry is in flux, we're open to a lot," he said. Our biggest laugh came from when he suggested NBCU—home to **Wolf Entertainment**'s "Chicago Fire," "Chicago Med" and "Chicago P.D."—somehow played a role in the selection of a Chicago Pope: "*Dick Wolf*'s agent is on the phone with the Vatican right now saying, 'Dick gets a cut.'"

Over at Fox, the message was that being a contrarian has paid off. "It's stamped in our DNA, and it's defined our company for decades. We launched a fourth broadcast network and a news network, both in mature markets, yet now industry leading. We sold cable when everyone else was buying, and

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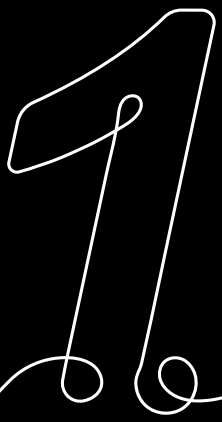

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when the industry turned its back on advertising and invested in subscription streaming, Fox remained committed doubling down on ad-supported streaming," said *Jeff Collins*, President of Advertising Sales, Marketing and Brand Partnerships for Fox Corp. The upshot is that over the last 12 months, total time viewing Fox properties was up 26% with double-digit growth in every quarter of last year.

During Monday's 3Q25 earnings call, Fox Corp CEO *Lachlan Murdoch* commented on the success of **Fox News**, disclosing for the first time that the network has seen an increase of more than 200 new advertisers since the election, with double digit growth in key sectors. "The really positive and important data point to note here is that they are continuing to advertise, so this is not a knee jerk or one-off reaction to the election, but these advertisers have found our audience—the creative work and the positioning is working for them and they're sticking on our air and continuing to advertise," he said, adding that the net is seeing a 30% increase in scatter pricing and more than 50% increase in upfront pricing in the direct response market as well.

At its upfront, NBCU touted that its collective portfolio reaches 82% of U.S. households on every screen across streaming, social and linear—in English and Spanish. "At a moment when attention is being pulled in multiple directions, our ability to collaborate across the company and work together towards a common goal is our superpower. And, that starts with our franchise-first strategy, investing in durable stories and brands that inspire fans everywhere in a multitude of ways. And all of this is supercharged by symphony—our secret sauce, where we rally together to eventize our company's biggest moments," said NBCU Entertainment & Studios Chairman Donna Langley. Those big moments include the Milan Cortina Olympics in February as well as Super Bowl LX and a 2026 celebration of NBC's 100th anniversary.

FOX DTC SERVICE IS ALL-IN-ONE

Fox's DTC streaming offering has an official name and it's less confusing than what **Disney** is doing with **ESPN**, **ESPN** and **ESPN+**. Meet **Fox One**, which brings Fox's VOD programming and linear channels under one subscription service, including **Fox News, Fox Business**, the **Fox Sports** channels, local stations, **BTN** and the Spanish-language **Fox Deportes**. Customers can also choose to bundle Fox One with the **Fox Nation** subscription streaming service. Fox One will launch this fall ahead of the 2025 **NFL** and college football seasons. The announcement comes after a JV between Fox, Disney and **Warner Bros. Discovery** for a sports streaming service called **Venu Sports** was scrapped in January. Pricing for Fox One is TBA, but if you're already a Fox cable subscriber, you'll get access to the DTC product, too. "It would be a failure of us if we attract more connected subscribers… We do not want to lose a traditional cable subscriber to Fox One," CEO L*achlan Murdoch* said during the company's 3Q25 earnings call Monday. He added that Fox is looking into potential partnerships with other services and distributors to offer Fox One in streaming bundles. The Fox One announcement comes just as Fox Corp. beat 3Q25 revenue expectations, boosted by 65% advertising revenue growth YOY, just over $2 billion, thanks to Super Bowl LIX (**CBS** had the big game last year). The company hit a total 3Q25 revenue of $4.37 billion, an increase $924 million or 27% compared to the prior year quarter.

BUDGET RECONCILIATION RUMBLE

The cable industry is among those concerned about tomorrow's **House Commerce** Republican budget reconciliation bill markup, given the spectrum targeted for an **FCC** auction that aims to raise $88 billion. The text to be marked up would extend FCC auction authority through Sept. 30, 2034 and require at least 600 MHz in the 1.3 GHz-10 GHz band to be auctioned within six years, excluding the 3.1-3.45 GHz and 5.925-7.125 GHz bands. That exclusion mostly alleviates worries that the 6 Ghz band might be impacted, but it's concerning to cable because it's possible CBRS band spectrum could be re-auctioned—something being pushed for by the big mobile network operators, like **AT&T**. The wireless carriers are sounding an alarm that wireless traffic is expected to triple by 2029, but cable argues that the vast majority of that traffic will travel over WiFi, highlighting the need to make additional spectrum available for unlicensed use for the ever-increasing WiFi demand. "We appreciate the committee's efforts to restore long-lapsed auction authority and preserve the continued availability of the 6 GHz band for Wi-Fi. However, we remain concerned both by the arbitrary nature of its spectrum targets and an overly narrow focus on exclusive licensing models," **NCTA** said in a statement to ***CFX***. "Without greater attention and support for licensing through shared spectrum models and the continued expansion of Wi-Fi, we risk failing in our efforts to 'expand the pie' of available commercial frequencies, promote wireless competition, and maximize value for consumers from use of the public airwaves." **Spectrum for the Future,** which counts NCTA, **Comcast**, **Cox** and **Charter** as members, said including the 3.5 GHz CBRS band in the general spectrum auction authority legislation "threatens to strip hundreds of private businesses and innovators of their licenses after they've invested billions of dollars of private investment to build out networks serving millions of customers—only to hand that spectrum to a few select companies for exclusive use even though they tell their

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investors they don't need it." Democratic committee members are also sounding the alarm. "This hyper-partisan reconciliation bill throws our bipartisan efforts on spectrum auction authority in the trash. Instead of directing spectrum auction funds to fund life-saving grants like Next Generation 911 or to make high-speed internet more affordable for American families, Republicans would rather funnel more tax breaks to billionaires," complained Rep. Doris Matsui (D-CA). House Commerce Chair *Brett Guthrie* (R-KY) dismissed the Dems complaints as fear mongering.

MORE NFL WINDOWS UNVEILED

Everyone loves a TV holiday special, including **Peacock**, which will stream an exclusive Week 17 **NFL** game on Dec. 27. **NBCUniversal** is calling the primetime football event the "Peacock Holiday Exclusive," which is almost as good as "A Charlie Brown Christmas." This is the streamer's fourth exclusive outing with the NFL, with a primetime "Sunday Night Football" game airing on NBC the following night. – Not to be outdone, **Fox Sports** announced at its upfront presentation a pair of exclusive broadcast windows for this coming NFL season. The doubleheader, featuring Philadelphia Eagles at Washington Commanders and Green Bay Packers at Chicago Bears, is set for Week 16 on Dec. 20. The addition bumps the slate to the most-ever by any network (11) and makes Fox the home of the most NFL windows this season (31).

FIBER FRENZY

Mediacom has deployed multi-gig and symmetrical speed broadband services to over 1,000 households in Arlington, Minnesota. Residents of the rural community can choose between three fiber-powered Xtream Internet tiers, ranging from download speeds of 300 to 2,000 Mbps and upload speeds of 100 to 1,000 Mbps.

INTRODUCING DISH ADVANTEDGE

Advertisers looking to buy **DISH** inventory can now do so using the provider's new AdvantEdge platform. Using DISH's first-party data and tech stack, AdvantEdge allows media buyers to target premium content across both CTV and linear. DISH says an analysis of recent campaigns using AdvantEdge led the pharmaceutical category to a +34% lift in brand scripts, automobile to a +26% lift in sales and the travel sector to a +17% boost in bookings.

COMCAST'S NEW UVA NETWORK

Comcast Business and the University of Virginia have launched a private wireless network on the Charlottesville campus. The deployment of the neutral host network, which supports multiple carriers, service providers and devices, is designed to improve connectivity for students, faculty and visitors, especially in high-traffic and indoor areas. The company is "leveraging cloud-based software management and strategic radio placement" to install the private network quickly and to minimize disruptions to activities on the UVA campus, an approach Comcast says can be replicated at other university campuses. The network is also designed to be customizable and scalable, per Comcast, to meet UVA's future bandwidth needs.

BERMAN SAYS YES TO 50 YEARS

When you think of the long history of **ESPN**, one of the faces that will immediately come to mind is that of iconic sports anchor *Chris Berman*, although to **NFL** diehards, he's their beloved "Boomer." The 70-year-old has covered over 40 Super Bowls and is now set to cover the very first to air on ESPN, coming on Feb. 14, 2027. ESPN announced that Berman has extended his contract to 2029, which will also mark his 50th anniversary with the sports channel. "I came to ESPN at 24 years young for my first full-time TV job. I had a full head of hair, was wet behind the ears," Berman said in a statement. "Never in my wildest dreams could I have imagined turning 70 and still being here at our network. We're closing in on our very first Super Bowl, and now I will be able to be part of that, too."

RATINGS

Pope Leo XIV's election drew quite a few eyeballs to **Fox News**' coverage of the Vatican. 3.7 million viewers, to be exact, 667,000 of them in the 25-54 demo, in the 1pm ET hour last Wednesday, according to **Nielsen**. Fox News handily beat **CNN** (1.5 million viewers) and **MSNBC** (974,000) in the channel's top-rated hour of the day and for the rest of the day. – **Warner Bros. Discovery** owned a 61% share of primetime viewing on May 4 among Adults 25-54. Over 31 million people watched programming on a WBD-owned network that night. The key programming that led to that win for WBD include the **NHL** playoffs on **TBS**, **NBA** playoffs on **TNT**, "24 in 24: Last Chef Standing" on **Food Network**, "Naked and Afraid" on Discovery, and "Sister Wives" and "90 Day Fiancé" on **TLC**.

CARRIAGE

TCLtv+ users now have access to **INSP** FAST channel **Western Bound**. Switch to channel 2022 for old-school Western shows, such as "The Rifleman" and "Cheyenne", as well as a few original series and a movie catalog that includes a couple of *John Wayne* flicks.

PEOPLE

INCOMPAS (The Internet and Competitive Networks Association) has appointed *Staci Pies* as SVP of Government Affairs and Policy. Pies will oversee the organization's advocacy initiatives in the broadband, communications, cloud tech, and AI spaces. She previously held policy roles at **Crown Castle**, **Google**, **Microsoft** and the **FCC**.