

Cablefax Daily™

WHAT THE INDUSTRY READS FIRST

Football Forecast: NFL-YouTube Experiment a Sign of the Future

The NFL hosting a game in Brazil is enough evidence to show it's looking to grow its reach, but Friday night's Chiefs-Chargers bout carries a little more weight for the future of the league. That's because it'll be the first time an NFL game will exclusively stream live and without a paywall on **YouTube**, and while it's expected to attain a hefty number of viewers, the question then becomes whether YouTube—and the networks of internet providers enabling access—can handle the blitz.

The NFL putting games on digital platforms is nothing new. **Prime Video** has a few seasons of Thursday Night Football under its belt and got the rights to a Wild Card game last year (Steelers-Ravens). **Peacock** was the first streamer to have an exclusive Wild Card game after hosting the Chiefs' 26-7 win over the Dolphins in January 2024. Nearly a year later, **Netflix** broke into the NFL scene with a pair of Christmas Day games and will stream another two this year. **ESPN+** has had exclusive games before as well, but may take on a different role amid the launch of **ESPN DTC** and the network's acquisition of [NFL Media assets](#).

YouTube, as well as its vMVPD sibling **YouTube TV**, is no stranger to the spotlight. The NFL and live sports are a different animal, however, and there's more than a handful of examples where streaming services experienced hiccups when they entered the live sports arena. Recall the miscues Netflix had in its aforementioned Christmas debut with audio and commercials. A month prior it had buffering and latency

issues with the Jake Paul vs Mike Tyson fight, which Netflix claims peaked at a record 38 million concurrent streams in the U.S. and had an estimated average minute audience of 108 million viewers globally. It even took Prime Video a few tries before getting a firm grasp on TNF in 2022.

Tonight's free-to-stream game has the attention of internet operators across the U.S. as they brace for network impact. **Comcast**, which often flaunts its network resilience and intelligence, has been preparing ahead of kickoff to sustain the heightened level of user traffic. Beyond the game itself being a high-profile divisional game, there's added interest to see if *Taylor Swift* will be in attendance to see her fiancée (seriously—her appearance on the "New Heights" podcast garnered 22.4 million views on YouTube. The three videos before that had 131,000, 35,000 and 59,000).

"Any game involving the Chiefs, obviously, is kind of a spectacle, and that's the first game that's not behind a streaming paywall ... I predict [tonight] might be the next peak that we see, and we look forward to that," Comcast CFO *Jason Armstrong* said **Citi's** 2025 Global TMT Conference. "Our network engineers have been all over it. We've been supplying additional port capacity; we're ready for it. And I would predict a lot of others [in the industry] are sort of looking at it the same way, but there's some that are more capacity constrained and really trying to manage capacity, where that's going to be a more nerve-wracking event. Whereas for us, it plays right to our sweet spot."



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Armstrong added that Comcast's enhancements aren't just about overall growth, but being ready when there are big peaks in usage. While the company is in the early stages for DOCSIS 4.0 deployments, there are positive signs that the operator is on a path for multi-gig symmetrical speeds "on par with anything out there." With those network upgrades, known internally as Project Genesis, Comcast wants traffic growth.

On the other end, it'll be another test in the NFL's exploration of its distribution future. It has a firm presence on broadcast and streaming platforms, but in a few years' time there could be a drastic shift in how games are distributed. Currently, the league's agreements with **ABC**, **CBS**, **Fox** and **NBC** run through 2033. However, after the 2029 season, the league can opt out of those deals, and it's expected it'll choose to do so. On the other hand, *Puck* [reported](#) in July that the NFL may try to renegotiate before the 2029 opt-out.

Whenever its rights do become available, the NFL is presumed to venture more into streaming. Companies like **Apple**, **Amazon**, YouTube-owner **Google** and Netflix will have enough cash to pony up, though **Liberty Media's John Malone** is of the belief large technology companies should pay a tax or fee to stream sports, but eventually, he still thinks that's where all sports will end up.

"[They] will all migrate to big tech over time, because of this ability to generate more revenue from the same event ... I'm not sure you can put the cow back in the barn on that one, but that was a terrible decision by the regulators," Malone said at a **Paley Media Council** event.

He thinks net neutrality has "given essentially free transport to big tech so they can outbid broadcasters for sporting events [and] not only do they have no transport costs, but they get to distribute streaming, which means they can sell individualized advertising. They can generate three times as much per household in ad revenue as the broadcasters can."

The TV titan said that it'll be very difficult to regulate live sports streaming now that the "transition" has started. "The world is moving so fast. These companies are global now, and you're trying to have national regulators regulate global businesses ... The nations can't agree on anything. How are they going to agree on regulation?" He added that "the most important thing is that innovation gets protected, so that a guy with enormous market power doesn't stop or prevent competition from springing up...It's clear in technology that would be a problem."

The NFL won't leave broadcast in the dust, but the Chiefs-Chargers game will be closely inspected by YouTube, ISPs and the league as they each figure out what the future has in store.

NEWSMAX'S FOX LAWSUIT DISMISSED, CAN REFILE

Newsmax's [legal effort](#) against **Fox Corp.** and **Fox News** was short-lived, at least in its current state. A federal judge in Florida dismissed the complaint and deemed certain sections "impermissible 'shotgun pleading.'" According to the order, since four of Newsmax's five allegations "incorporated all preceding allegations," it was rendered a shotgun complaint. Newsmax, however, can file an amended suit.

COX HAS PLENTY OF FRIENDS IN SCOTUS COPYRIGHT CASE

A flood of amicus briefs hit the **U.S. Supreme Court** Friday in support of **Cox's** request for a [review](#) of a **Fourth Circuit Court of Appeals** decision that found the operator liable for secondary copyright infringement by failing to quickly disconnect users accused of infringement by the music labels. **The DOJ** is among those filing in support of Cox's attempt to have the Sony decision reversed. "The court sustained a jury verdict holding petitioner Cox Communications liable for continuing to provide internet access to specific accounts that Cox knew had been used to commit repeated acts of infringement. That expansive view of contributory copyright infringement cannot be reconciled with this Court's precedent," said the brief. "In both copyright and patent cases, 'mere knowledge of actual infringing uses' is an insufficient basis for imposing secondary liability on the seller of goods or services that are used to commit infringement." **Altice USA**, **AT&T**, **Charter**, **Frontier**, **Lumen**, **T-Mobile** and **Verizon** filed a joint amicus brief warning that the damages providers are exposed to can quickly become immense as they would face up to \$150,000 in statutory damages per work infringed (the music labels count each song as a work). "The threat of liability detracts from amici's continued investment to fulfill Congress's goal of connecting all Americans to the internet," they wrote. Others backing Cox include **Google**, **X**, **Public Knowledge** and various industry associations, including **CTIA**, **ACA Connects** and **USTelecom**.

HALLMARK, HULU RENEW

Hallmark and **Hulu + Live TV** renewed their multiyear distribution agreement for **Hallmark Channel** and **Hallmark Mystery**. The deal includes 24/7 programming on both networks year-round and is just in time for Hallmark Channel's 16th annual "Count-down to Christmas" event. Hulu + Live TV subs will continue to have thousands of hours of holiday content through the deal.

JOHN MALONE ON PAST DEALS AND FUTURE OF CABLE INDUSTRY

Liberty Media Chairman and cable legend *John Malone* has been working the press circuit of late, with the release of his new memoir, "[Born to Be Wired](#)," the cause for celebration at a **Paley Media Council** event Thursday. Moderated by journalist *Mark Robichaux*, Malone was joined by **Warner Bros. Discovery** President/CEO *David Zaslav*, **Liberty Global** CEO *Mike Fries* and **IAC** and **Expedia** Chairman/Senior Executive *Barry Diller* for a wide-ranging discussion that looked at Malone's long career, while also touching on what the "Cable Cowboy" sees for the future. Malone was very complimentary of all his fellow panelists, calling Fries his partner in growing Liberty into a global brand and digging the company "out of the muck" when "it owed probably four times more than it should or could." He added that "Mike probably led the charge in putting cable together with wireless [and] becoming a connectivity company in which the content component becomes quite small as a percentage of the cash generation." Malone also lauded Zaslav for growing **Discovery** from "renting **BBC** documentaries and distributing them" to a global programmer and seeing where the industry was headed with the rise of streaming. "David calls up and says, 'What do you think? I've been approached by **AT&T**. Do we want to buy Time Warner?'" Malone recalled. That deal of course resulted in the formation of Warner Bros. Discovery, which is now in the process of splitting up into two separate companies, with Discovery Global set to house WBD's linear assets. Zaslav and Malone were thinking about the future of linear back when Discovery was considering the Time Warner deal, too: "We knew that Discovery had a limited successful life expectancy as a linear service, so we were going to face the same issues at Discovery that we ultimately faced together." Malone added that "we probably could have done a better diligence job to understand what we were merging with, but we were precluded by antitrust law from having access to the actual information," revealing that "AT&T had taken a \$2.5 billion **HBO** positive cash flow and turned it into a \$2 billion negative cash flow." His quip that "that's not easy to do, guys, you've really got to work at it" got plenty of laughs from attendees. Zaslav, in turn, praised Malone for "recognizing the power of broadband" and having a vision that "the cable operators may be separate around the world, around the U.S., but if they come together, they could own broadband in all of America." The WBD head specifically spotlighted Malone's work creating **CableLabs**: "He brought in the best technology people that would build one platform, and then the whole industry could use that." Wrapping up the panel, Malone took a hopeful tone about the industry's ability to adapt over the years when challenged by new technology and regulators: "Hopefully, cable will reinvent itself yet again as a combined service, the ability to deliver full connectivity seamlessly across wired and wireless and content being a simple component of that delivery."

ROKU INTEGRATES YOUTUBE TV IN SPORTS EXPERIENCE

Starting today, **Roku** users will be able to find **YouTube TV**'s live sports programming on the Sports Experience hub, a centralized location for browsing sports content across the platform that's accessible on the home screen menu. YouTube TV programming will also soon be accessible across Roku's content discovery destinations. Roku Sports' list of partners also includes Spectrum TV, Xfinity Stream, **DAZN**, **Fox One** and **Frndly TV**.

FIBER FRENZY

WOW! announced the company has surpassed 100,000 fiber homes passed in its Greenfield markets. The ISP's Greenfield market strategy is focused on bringing the company's fiber network to areas where its services were previously unavailable, including in Livingston and Genesee counties in Michigan; Greenville County in South Carolina; and Hernando, Orange and Seminole counties. Most recently, **WOW!** connected Flint, Michigan and Simpsonville, South Carolina. Customers in these markets can access speeds of up to 5 Gigs. The milestone brings the ISP closer to reaching its goal of passing 400,000 fiber homes in new communities in the coming years.

NAB FOCUSES ON SPORTS IN LATEST REGULATORY PUSH

NAB launched a new phase in its campaign to modernize broadcast ownership rules, with new creative highlighting the risk of losing live sports on free broadcast channels. The new spots come as football season kicks off, with **YouTube** airing tonight's Chiefs-Chargers game and **Peacock** streaming last night's Eagles-Cowboys matchup. NAB is touting a national survey in which 83% of respondents said they prefer games on broadcast compared to just 17% who prefer paid streaming. Since April, NAB has aired nearly a quarter million television and radio spots across 192 media markets, generating more than 1 billion impressions and \$43 million in airtime from TV and radio stations. The broadcast association said that translates into more than 174,000 emails in support and 34,000 tweets directly to members of Congress and FCC commissioners.

PROGRAMMING

Starz acquired the U.S. rights to Channel 4's suburban drama "The Couple Next Door" Season 2. It'll premiere Sept. 19 on the Starz app as well as all of the network's streaming and on-demand platforms. – "The Paper," the long-gestating "The Office" spinoff set inside a failing newsroom in the Midwest, is finally out Thursday, with all 10 eps dropping on **Peacock**. Ahead of the series premiere, **NBC** has handed the new sitcom

a Season 2 renewal. – **Fox Nation** is teaming up with *Curtis “50 Cent” Jackson* for a new true crime series called “50 Ways to Catch a Killer,” which premieres on Sept. 16. – **History Channel** is bringing back reality series “Ice Road Truckers” for the first time in eight years, with Season 12 set for an Oct. 1 premiere. – “It” TV prequel series “Welcome to Derry” will be released on Oct. 26 on **HBO Max**. *Bill Skarsgård* returns as *Stephen King*’s most terrifying monster, Pennywise the Clown.

HONORS

NAMIC revealed television talk show host and Emmy-winning journalist *Tamron Hall* will receive its highest honor, the Mickey Leland Humanitarian Achievement Award. She will be honored on Oct. 22 at the Marriott Marquis in New York during the [2025 Annual NAMIC Conference](#). Named in honor of the late Congressman Mickey Leland who was a strong advocate for social justice and equality, the Mickey Leland Humanitarian

Achievement Award recognizes individuals and companies in the media, entertainment and communications industries for their philanthropic work and commitment to advancing the concerns of people of color. – The Cheyenne Frontier Days Hall of Fame honored the late *Patrick Gottsch*., media entrepreneur and founder of **Rural Media Group**, during its 2025 Hall of Fame Induction Ceremony today. The event celebrates those who embody the spirit, history, and culture of the world’s largest outdoor rodeo and western celebration. Gottsch put rural and western media front and center through **RFD-TV** and **Rural Radio** on SiriusXM Channel 147

EDITOR’S NOTE

The **Cablefax Most Powerful Women** [standard entry deadline](#) ends tonight. Honorees will be featured in the December issue of **Cablefax: The Magazine** and will be celebrated at a Dec. 4 event in NYC.



CABLEFAX DASHBOARD

Social Media Hits



Quotable

“The industry—the old media industry, both transport and content—needs to continue to consolidate, to get scale, to be efficient. There’s too many streamers for sure, and obviously, broadcasting is morphing into sports distribution, at least for now, keeping it alive if not highly profitable... At the moment, big tech has the upper hand. Distribution for big tech is free on the internet, thanks to network neutrality, a regulatory decision that was put in by the Obama administration and really did cripple the traditional cable media alignment.”

- **Liberty Media Chairman John Malone** on [CNBC’s “Squawk Box”](#)



Up Ahead

- SEPT. 12-15:** [IBC 2025](#), Amsterdam
- SEPT. 15-18:** [NTCA Fall Conference](#), Las Vegas
- SEPT. 28:** [Cable TV Pioneers Banquet](#), DC
- SEPT. 29-OCT 1:** [SCTE TechExpo25](#), DC
- OCT. 6-8:** [Streaming Media](#), Santa Monica
- OCT. 6-9:** [Advertising Week](#), NYC
- OCT. 14-15:** [Mobile World Congress Las Vegas](#)
- OCT. 19-21:** [WICT Leadership Conference](#), NY
- OCT. 21-22:** [NAMIC Annual Conference](#), NY