

DID YOU KNOW?

NCTC's Lou Borrelli and ACA Connects' Grant Spellmeyer joined CFX Download for a conversation that covered what to expect at this year's Independent Show and more! Tune in on [YouTube](#), [Apple Podcasts](#) and [Spotify](#).

NETFLIX'S CLOUD GAMING PROGRESS

With **Paramount Skydance** recently opening a gaming unit and **NBCUniversal** said to be eyeing an investment in the space, a **Paley Media Council** talk Thursday about adapting popular IP into video games felt very timely. Speaking on a panel that also included former **Disney** Chairman/CEO *Michael Eisner*, **Delphi Interactive** CEO *Casper Daugaard* broke down the strategy behind "FIFA World Cup: Launch Edition," a new cloud-based soccer title for **Netflix** that launched on the first day of the real-life tournament.

Netflix users can access the game via select TVs or their web browser, using their smartphones as the controller. Up to four players can quickly jump onto the digital pitch to play a friendly or a full tournament simulation with all 48 nations on offer. But unlike **Electronic Arts'** ultra-realistic "EA FC" soccer simulator, Netflix's game was purposely designed to have a more arcade-y and approachable feel. "A sports game for sports fans, not just gamers," as Daugaard described it. The idea is that fans excited by all the World Cup content on TV will want to go then and play matches for themselves.

"[EA FC] is \$4 billion in revenue per year that it generates consistently. But when you double-click on it, you see that revenue only comes from about 20-30 million people, which, if you're in games, is a huge, amazing cohort... But then you have to think about how there are a billion people who will be watching the World Cup final... we've got to find a way to get to those fans as well." In other words, the goal was mass appeal while engagement around the sport was at its peak. "We pitched that vision to FIFA President *Gianni Infantino*, who has his own vision for the sport, which is that football should be a truly global sport. And we said we agreed. We want to apply that vision to digital football."

Eisner, who founded the investment firm **The Tornante Company**, helped finance the project, seeing real potential in a more casual soccer experience. "Casual games are 90% of the business, not the big expensive \$200 million games. There's a big market. Netflix has 200,000 subscribers, so there's a big base, and they were making a game with FIFA," he said of why he got involved.

A little over a month in, the results are promising so far. "It's by far the biggest game launch on Netflix. Between us here, we've melted down some servers a few times," Daugaard said. He noted that the game is seeing success in "more emergent markets" for Netflix, like Mexico and Brazil, where "within hours, hundreds of thousands of people were playing because it was just right there" on the streamer's homepage.

Leveraging the World Cup's popularity was of course a no-brainer for Netflix, but that's wrapping up Sunday with the long-awaited final between Spain and Argentina. Then what? Daugaard sees an even bigger opportunity to tie in the noise around the real-life sport ahead: the 2027 Women's World Cup, which will stream exclusively on

Netflix. It's a first-of-its-kind streaming partnership for that FIFA tournament.

"For the first time, I think in the history of media, games and linear will converge on the Netflix platform, and you can be watching the Women's World Cup or some other football content and be like, 'I can do better than that,' [and] jump right into a simulated environment," Daugaard said.

That's all well and good, but if you haven't been following the gaming industry of late, it's actually a really tough time for the business. The rising costs of game development and hardware have led to mass layoffs across the industry, most recently at **Microsoft's** Xbox, which is also in the process of selling or spinning off several of its studios. As **LightShed Partners** said in a note recently, "[Gam-ing] has not exactly been a growth business" of late.

So, why do media companies that aren't already major players in the space want to invest now? Netflix co-CEO *Greg Peters* offered some thoughts on why it's expanding its games portfolio during an earnings call this week.

Peters explained that gaming represents roughly \$150 billion in consumer spend. "Those cloud-based TV games, we really see it working... Since last October, when we really scaled up this cloud initiative, monthly active players for cloud games have increased 11x and adoption is significantly ahead of that curve that we had for mobile games with even higher retention value." He added that the streamer is also seeing great engagement from kids' games offered on the Netflix Playground app. "We've seen 3x growth in daily players since that launch. That's driven more engagement in kids' mobile games, which is up 600% YOY."

With attention divided across so many different forms of content, including snackable clips on TikTok and Instagram (and increasingly on traditional SVODs), gaming is positioned as a way for Netflix to boost engagement growth, which some analysts fear is slowing on the video side. It helps that it's making this push as cloud gaming becomes more accessible for casual audiences than it ever was before, with several cable operators, including **Comcast** and **Char-ter**, launching low-latency platforms to support these sorts of streaming use cases. And while it plans to spin off NBCU, presumably before the programmer makes its gaming move, Comcast is already in on cloud gaming, offering it to its **Xumo** Stream Box and X1 customers via a partnership with **Amazon's** Luna game streaming platform, and is experimenting with aggregating live and VOD content with games on its Entertainment OS platform.

Next up on Netflix's gaming roadmap is "Netflix Minigolf" on July 28, featuring characters and settings from "Stranger Things," "Bridgerton," "Squid Game" and more. Netflix is now focused on scaling up cloud games, according to Peters: "We're scratching the surface in terms of what we think the total potential of the space offers us. You're going to see us continue to calibrate and refine our level of investment here."

HERE WE GO AGAIN

Is it even news at this point that President *Trump* called on the broadcast licenses of **ABC** and **NBC** to be revoked after they opted not to run his address to the nation live on their networks Thursday night? He did; Democrats com-

CFX Daily (ISSN 1069-6644)
is published daily by Access
Intelligence, LLC.
cablefax.com

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plained. For the record, ABC and NBC did run it on their streaming platforms. Trump's quote: "In a rare move, NBC and ABC fake news have both said that they would not cover this speech. They knew what it was about, because of the fact that they don't like the topic, because they know how corrupt our system is and they don't want to reveal it. They and others in the media are part of a plot... Fraud like this should mean a revocation of their licenses. They use our public multibillion-dollar-in-value airwaves for absolutely no money."

COURT KEEPS DIGITAL EQUITY GRANTS ALIVE

A D.C. District Court judge this week struck down a provision of the Digital Equity Act identifying racial and ethnic minorities as one of eight 'covered populations,' while rejecting the *Trump* administration's bid to kill the broader Competitive Grant Program entirely. The grant initiative, part of the 2021 Infrastructure Investment and Jobs Act, provided \$2.75 billion for programs intended to expand broadband adoption and digital skills among communities facing barriers to internet access. The court found that the Digital Equity Act is unconstitutional insofar as it authorizes the allocation of federal money based on a racial classification, but said that aspect is severable from the act. **Public Knowledge** disagreed with the court invalidating Congress' inclusion of racial and ethnic minorities among the populations the program was designed to reach, but is thrilled the program can continue. "Whether or not NDIA decides to appeal, the **Commerce Department** and Administrator [Arielle] Roth should now do what the department has pledged to the court to do: restart the program promptly and put the funds Congress appropriated to work, following Congress' intent to reduce barriers to digital connectivity," it said in a statement.

CARRIAGE

FETV has expanded its distribution with **Comcast**, bringing the network to millions of additional Xfinity homes across the Midwest, Southeast and Florida. The launch includes major markets such as Chicago, Detroit, Atlanta, Miami and Orlando.

FIBER FRENZY

Charter is connecting over 1,300 locations in Oconto County, Wisconsin, more than 1,700 in Union County, Ohio, and over 275 in Sumter County, Florida, to Spectrum services. -- **Race Communications'** fiber network will expand into Lodi, California, as the ISP continues to build its San Joaquin County footprint. The fiber provider plans to bring 17,000 homes and businesses through this latest project. -- **Cable One** said its **Sparklight** brand has spent the last three years upgrading its fiber network in Louisiana, investing nearly \$3 million to expand and strengthen connectivity in New Roads, Ventress, Jarreau, Oscar, Morganza, Lakeland, Belle Chasse, Point Coupee and surrounding areas. Today, Sparklight's network in the state spans over 31,000 route miles, offering residential speeds of up to 2 Gbps and up to 10 Gbps for enterprise, carrier and wholesale customers.

RATINGS

ESPN Chairman *Jimmy Pitaro* noted at an event Thursday that his network had its best first-half viewership in a decade, despite continued cord-cutting trends. And when you factor in **ABC**, it's the best mark since 2012. Pitaro credited the initial success of ESPN DTC with expanding its reach, which helped generate a combined 288 billion minutes of sports content viewed across ESPN and ABC through the first six months of 2026. ESPN's average minute audience came in at 800,000, up 12% YOY and its best since 2016. The network's 1H26 primetime average was 2.1 million. -- The **MLB** All-Star Game took place Tuesday night on **Fox** and **Fox Deportes**. The telecast reeled in 8.79 million viewers, with the English-language broadcast accounting for 8.68 million alone. The total viewership made this week's event the most-watched MLB All-Star Game since 2018 (8.7 million), in addition to posting a 21% improvement from last year (7.19 million). -- No surprise that Argentina's dramatic 2-1 win over England became the most-watched men's **World Cup** semifinals telecast in English-language U.S. history Wednesday on **Fox**. The game averaged 15.06 million viewers, per preliminary **Nielsen** data, peaking at 22.18 million from 4:45-5pm. Spain's 1-0 win against France on Tuesday notched 11.46 million viewers. Meanwhile, **Tel-emundo** said its Spanish-language coverage averaged a total audience delivery of 10.4 million viewers through the quarterfinal stage, a 154% improvement from Qatar 2022. --