

At the Upfronts: What They Said, and What it Means

By Steve Sternberg



The official start of the fall television season is still four months away. But for insiders at media agencies, networks, and advertisers (as well as television analysts like me), the upfront season has placed thoughts of September squarely into May. Of course, in today's video world, the very notion of a fall TV season is antiquated. Only the broadcast networks still adhere to seasons that begin in September and end in May. What, where, and how people watch television have changed substantially over the past decade, as have the events that kick off the upfront. But traditions often die hard.

In a series of presentations to the advertising industry and press, the major media companies just announced plans for their linear and streaming platforms during the next year or so, which includes their respective TV schedules. This marks the start of the "upfront," when advertisers spend upward of \$20 billion buying commercial time on national television programs scheduled to air during the next broadcast year (September-August).

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The once highly anticipated upfront week has become a much more subdued affair during the past three years. Because of the pandemic, these presentations were exclusively virtual, which simply can't match the energy that surrounds live events at Radio City, Carnegie Hall, MSG, or Lincoln Center, and the subsequent celebrity-filled after-parties. Last year's upfront presentations were live once again, although those who didn't yet feel comfortable returning to crowded settings were still be able to live-stream them.

This year, the upfront events were live (although the streaming option now seems like a permanent fixture). But the writers' strike resulted in another year of less glitz and pizzazz, as stars of primetime and late night entertainment shows steered clear of the picket lines. Sports and news personalities didn't seem to have any such concerns.

Paramount Global (CBS) bypassed its decades-long upfront venue, Carnegie Hall, for more intimate (and less costly) gatherings and dinners with individual clients. Netflix had planned its first live upfront event, but chose to go the virtual route to avoid the writers' strike protesters.

Major Upfront Themes

Here are some of the common themes that stood out and were repeated throughout the week. All statements regarding how many people they reach, whether they are #1 at something, or how much better they are than their competitors, are the individual claims of each company, whether or not I put the comments in quotes (I have not independently vetted any of their assertions). My commentary will be apparent. New series listed here will be detailed and reviewed in an upcoming issue of *The Sternberg Report* after I watch the pilots.

Our unrivaled, unified company reaches everyone, everywhere, all at once



Common refrains: We have the greatest reach, scale, scope, and impact. We are armed with multiple networks, platforms, and genres that combine into a unified force that can impact anyone and everyone. We have the best technology and tools to bring all our platforms together for advertisers. “Unified” is one of the big words of the week (as it was last year), as was the phrase “Bringing it all together.” Another word that everyone seems to be using, which ties in with “unified,” is “one.” There’s NBCU’s *One Platform, One Fox, and One Paramount*. Warner Bros. Discovery has something similar, but it’s called *WBD Stream*. Disney has *Disney Select* – and let’s not forget Nielsen One. It’s all discussed below.

Disney

With its many TV platforms, which include linear broadcast and cable networks, as well as growing streaming services, Disney has the “innovative, unrivaled programming and technology to connect brands with the best audiences.” “All the extraordinary content...is underpinned by world-class tech and innovation.” *Disney Select* is a first-party data identity graph that tells advertisers (in an anonymized way) who Disney’s viewers are and what they are interested in. Disney believes “identity will be the new currency.”

FOX

Fox is in a unique position with its portfolio of live sports, news, and entertainment – broadcast television is still the best platform. “To add to Fox’s already powerful portfolio, we went all-in on AVOD.” Tubi has grown by 44% since Fox took it over. Fox Digital leads everyone. Fox is “all in for you,” and One Fox provides “unifying scale” that allows advertisers “to target the audiences that matter most, using data and measurement providers that

[advertisers] choose.” In a fragmented world, its focus on content and advertisers is Fox Entertainment’s biggest differentiator.



NBCUniversal has a “unique, unmatched portfolio,” which includes broadcast (NBC, Telemundo) and cable networks (USA, Syfy, Bravo, MSNBC, CNBC, E!, Oxygen), sports and news divisions, and Peacock (“the fastest growing streamer in the U.S.”). We have “massive reach and low duplication.” NBCU has unmatched global and local reach and scale, with every platform and genre in English and Spanish. Our ability to “bring it all together for advertisers...separates us from our competition.”

In a extremely competitive marketplace, advertisers “need every impression to work harder than ever.” NBCU’s One Platform is “the only advertiser-first ecosystem that provides you with more consumer touchpoints, smarter technology, bigger partnerships, and the best impact and sales results for your business.” Combining the “biggest broadcast network in prime, NBC,” with “the most complete streamer (Peacock),” advertisers can reach 160 million people, with only 10% duplication. Unlike some of NBCU’s digital competitors, “it’s in the content you actually want to be a part of.” And when you bring all these platforms together, “fragmentation isn’t scary, it can be an advantage for your brand.” “One Platform lets marketers tap into the combined power of this company, reaching 1 billion people worldwide.”



Paramount Global, which had private meetings with clients before upfront week, was quoted in *Cynopsis* as saying, “we have the strategies and the assets to attract massive audiences. We have a networked ad platform that reaches audiences wherever they are, and are extremely well positioned to capture share as advertising becomes increasingly digitally activated. We have the scale and capabilities to create efficiency and effectiveness for our advertising partners.”



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Warner Bros. Discovery was big on adverbs. Before the actual presentation began, the screen encouraged everyone to dream, with the line, Dream Bold Here. Then there were 50 other different ways to dream listed – ruthless, original, peerless, natural, fierce, fiery, classic, connected, relentless, strong, joyful, epic, fast, empowered, proud, beautiful, true, timeless, family, legendary, big, crazy, delicious, real, iconic, deep, magical, inspiring, brave, cool, together, audacious, determined, loud, sweet, adventurous, curious, unbeatable, colorful, genuine, eclectic, groundbreaking, passionate, victorious, authentic, fabulous, heroic, transformative, fearless, and live.

WBD has the best network brands, which will have more than 4,000 hours of entertainment content this year. WBD Sports is “creating fantastic premium content” with March Madness, NBA Playoffs, NHL Stanley Cup, and Major League Baseball reaching a wider, more engaged audience. WBD is “unique in reaching the casual fan.” WBD’s unified data and technology provides addressable advertising to 50 million households.

The company has a new sales platform called WBD Stream to help deal with viewer fragmentation and allow targeted advertising across screens, placing ads on all its digital platforms.



TelevisaUnivision delivers 60% of all Spanish-language viewing.

We have the best content; it's all about storytelling, and diversity (and writers)



It's almost as though everyone got together last year and decided "storytelling" was going to be one of the key words used to provide some distinction between them and their competitors. It continued throughout this year's upfront week. Also rising to the surface last season was a virtually universal commitment to diversity and giving voices to under-represented communities. Of course, storytelling requires writers, and no one knows how long the strike and resulting production delays will last.

Disney is distinguished by its storytelling, which the company has been "cultivating for a century." "In this area of great change, creativity and innovation continue to be the cornerstone of all we do at Disney." "...communities of color and other underrepresented people deserve greater advertiser investment. Multicultural is mainstream. It's time to lean into all dimensions of diversity."

At **Fox**, it's all about "visual, emotional storytelling" and engaged viewers.

NBCUniversal believes its storytelling and great content "defines and redefines fandom."

Paramount Global was quoted in the press as saying, that all their content is longform – "It's watched on the big screen. That's the greatest format for brand storytelling ever invented."

The CW "had to comb the world for great stories."

Warner Bros. Discovery networks' storytellers create engaged audiences with "shared experience and human connection." "We are champions of inclusion." The company is taking "big swings across storytelling, authenticity, and cultural conversations." WBD announced a new sales division devoted to diversity, equity, and inclusion, focused on branded content, sponsorships, and event integrations for diverse audiences. The goal is to "better align brands across demographics and communities, including Black, Hispanic, and LGBTQ+." WBD also announced "inclusive content stacks," hubs that aggregate diverse content.

We have the strongest sports and news operations



Disney spent the first 45 minutes or so of its presentation focusing on ESPN. It continues to be the leader in live sports, highlighted by College football, *NFL Monday Night Football*, Major League Baseball, NBA and WNBA basketball. Through the various ESPN networks, ABC, and ESPN+, Disney airs more than 94,000 hours of live sports a year. It also has the best sports news with *SportsCenter* and several sports specials and documentaries (Serena Williams was there to talk about her upcoming docuseries).

Disney also spent some time focusing on its strong news operation, with particular emphasis on the importance of journalism by local TV stations, as well as local community outreach. ABC's owned-and-operated stations were highlighted, as was *Good Morning America*. It's the first time I can recall a network talk about its local news operation at an upfront presentation. "This is a company committed to journalism beyond the headlines," said *World News Tonight* anchor David Muir.



Fox spent a considerable amount of time talking about the strength of its sports and news divisions. Fox News is not just the most watched news network, but is number 1 in all of cable, while Fox Business is the leading business news network.

As the network cited its Fox News division and trotted out some of its news personalities – Dana Perrino and Bill Hemmer who pointedly asserted that they have “more anchors and reporters from outside the coasts” than any of its competitors, with “stories not just for the coasts,” there was mostly silence from the crowd of ad execs. They also pointed out that Fox News draws more voters from all parties – Democrats and Independents, as well as Republicans – than any other cable network.

There was also a live feed from the set of Fox News’ popular roundtable discussion show, *The Five*, with Greg Gutfeld, Jesse Watters, Jessica Tarlov, and Jeanine Piro. From there, they introduced soccer star Carly Lloyd as the newest Fox Sports member (Fox will be airing the Women’s World Cup) – an interesting transition since Jesse Watters and other members of *The Five* have called U.S. women’s soccer players unpatriotic. The show ended with its star sports anchors, Rob Gronkowski, Derek Jeter, Alex Rodriguez, Michael Strahan, and Carli Lloyd throwing football, baseball, and soccer balls into the crowd.

No news organization has the multi-platform reach of **NBCUniversal**. NBC focused on its news operation by having its news anchors present info on its scripted programming (since entertainment talent was absent, not wanting to cross picket lines). MSNBC’s Stephanie Rule, Jen Psaki, and Alex Wagner, CNBC’s Andrew Sorkin, and NBC’s Willie Geist, did the honors, and also highlighted MSNBC, CNBC, the *Today Show*, its NBC News Now streaming service, and Telemundo’s news

operation. NBC also talked about the strength of its *Sunday Night Football* lineup, as well as its new deal with Big Ten college football.



Paramount Global, as already mentioned, did not present this year. But if they had, it likely would have been similar to last year, when they touted CBS Sports as being everywhere viewers are across all platforms. They would have continued to point to the powerful legacy of CBS News, and remind the crowd that *60 Minutes* remains the gold standard of news magazine shows.

Warner Bros. Discovery touted the power of its “fantastic” big-event live sports – NCAA March Madness, the NBA playoffs, NHL playoffs and Stanley Cup finals, U.S. Soccer, and Major League Baseball (which is up 47% from last year because of new rules to speed up the game). We use our immense resources for “quality over quantity,” (a dig at ESPN?), have extremely engaged audiences, and are “unique in reaching the casual fan.”

WBD also highlighted CNN as the most “trusted global news organization.” CNN is strengthening the role of journalism by “pursuing the truth.” The network has a commitment to “reporting over punditry” and “news over noise.” CNN has the youngest, most diverse audience in cable news, and CNN Digital is the #1 global news destination.

TelevisaUnivision made a deal with the NFL and CBS to air its first NFL game ever in Spanish – the Super Bowl – this coming February. It will also air the 48th edition of Copa America football (soccer), which will be hosted this June-July in the U.S. for only the second time.

We're number one



Whether touting being #1 among some “key demo,” some daypart, some genre, streaming, or social media, there is so much data available to mine that every company, as well as all broadcast and most cable networks, can claim to be #1 at something.

Disney has the #1 network in broadcast network entertainment (ABC). “It also has “the best in sports in ESPN across not only linear, but streaming, social, and everything else.”

Fox lauded the strength of its sports and news divisions. Fox News is #1 not just among news networks, but in all of cable. Fox Business is #1 in business news. Fox Weather is the most downloaded free app. Tubi is the top-rated free entertainment app, and the #1 AVOD in the U.S.

NBCUniversal boasted that Bravo is #1 among Women 25-54, USA is #1 for live viewing, Peacock is the #1 downloaded app, NBC has the top 3 broadcast series, *Night Court* is the #1 comedy, *The Tonight Show* and *Late Night With Seth Meyers* are #1 in late night among key demos, Telemundo, the fastest growing network in primetime, has the #1 primetime show (in any language).

Paramount Global has traditionally leaned in the most on the “we’re number 1” thing, long claiming CBS to be “America’s most watched network.” Had they done their normal industry-wide upfront presentation they would undoubtedly have claimed the same things they did last year, namely that CBS has long been the #1 broadcast network (in total viewers), #1 in late night, #1 in daytime, and the #1 college football network, Nickelodeon is the #1 kids network and Nick Jr. is the #1 pre-

school franchise. Paramount also has the #1 cable network among Black adults (BET), the #1 cable entertainment special among LGBTQ viewers (MTV's *Video Music Awards*), the #1 free streaming service (Pluto). And, of course, *60 Minutes* is the #1 news magazine show in the history of television. They also mentioned last year that Paramount was #1 in the reality eco-system, with MTV's *The Real World*, as well as CBS's *Survivor* and *Amazing Race* still going strong.

Warner Bros. Discovery has six of the top 10 cable networks (TNT, TBS, Discovery, Food, HGTV, TLC). WBD is #1 in broadcast and cable combined, reaching 90% of viewers. WBD had 40+share among Adults 18-49 on 28 nights, and had 41 of the top 100 searched shows.

We have the best streaming platform – and it's (partly) ad-supported

It's hard to imagine that the first hit scripted streaming series, Netflix's *House of Cards*, debuted just 10 years ago. And just four years ago, Disney+, HBO Max, Peacock, Apple TV+, and Discovery+ did not yet exist. Only two premium streaming services, Hulu and CBS All Access (now Paramount+) accepted any advertising. By the end of this year, all of the major streaming platforms will accept some form of advertising to at least a portion of their subscribers.



Disney's streaming services (which include **Disney+**, **Hulu**, and **ESPN+**) "are driving momentum." "You're seeing more and more advertisers wanting to be in these environments, so we built a strategy around our tech and data enablement for them to plan, buy, and measure all they want within our ecosystem." The growth of Disney+ is fueled in no short part by its tremendously strong Marvel, *Star Wars*, and Pixar franchises. The ad-supported tier of Disney+ now has more than 100 advertisers and is growing.



Fox's Tubi has the largest streaming library, with more than 50,000 titles, and now boasts 64 million active monthly users. It has numerous genres all in one place and is the “best ad experience in streaming” – no paywalls and a light ad load. Fox touted that 1% of all streaming is now on Tubi (which I guess they deem bragworthy).



NBCUniversal's Peacock is the “fastest growing streamer in the U.S.” NBC and Peacock together reach 160 million with only 10% duplication.



Paramount Global was quoted in *Cynopsis* as saying, “Our growth in streaming has been meteoric. **Paramount+** has “added more subscribers since its launch than any other streaming service.” It’s clear that the viewing migration has happened, and continues to evolve.



WBD's max (formerly HBO Max) will be a mega streamer bringing all of its properties together – TNT, TBS, HBO originals, Max originals, DC, Cartoon Network, CNN, Discovery, Food, HGTV, Adult Swim, TLC, TruTV, Science, OWN, Animal Planet, and WB movies will all appear on max. Sports will join the streamer in the future. TV shows will premiere on max the same night as they debut on its linear networks. It officially launches on May 23rd. Discovery+ will still be a separate app for only \$4.99 per month. HBO is not changing at all.

Max has unparalleled breadth. WBD cited research that shows 80% of streaming viewers watch both scripted and unscripted shows. max is one service to fit every mood, every family member, and satisfy any craving. It has the most premium brands, content, and viewers, with the least clutter. It

has scripted comedy and drama, lifestyle and unscripted programming, documentaries, and movies. Roughly 63% of Max's audience is under 40.



TelevisaUnivision has more than 30 million monthly users globally for its VIX streaming platform – 63% of users are additive to its linear TV network. And 80% of usage on VIX is content no one has.

And then there's Netflix

I was not invited to the Netflix virtual upfront presentation, so this section is based on what I've heard and seen reported, not what I observed for myself.



Netflix claims it has five million global monthly active users for its ad-supported tier. While this seems to have impressed Wall Street (which has never really understood streaming), as its stock price jumped by 10% right after Netflix's presentation, it is actually not a very significant number. It makes Netflix currently akin to a small cable network when it comes to advertising (active users and actual viewers to regular series are two very different things). Netflix acknowledged it has “a long way to go to build scale in advertising.”

On the positive side, Netflix claims its “Basic With Ads” option has a median age of 34 (much younger than virtually any non-kids linear network), and 70% of its ad-supported members are Adults 18-49. Netflix also claimed its “two-or-more-hours” reach is higher than anyone else's one-minute reach – which is typically how reach is measured. This is a remarkable indication of viewer loyalty and of Netflix's holding power – although I'd like to see this two-hour reach number for other streamers (and linear networks).

Netflix says that 25% of its new sign-ups is for the “Basics With Ads” option – although I haven’t heard anything about how many long-time subscribers have converted to the ad tier (or if they are demographically similar).

Netflix claims its partnership with attribution measurement company EDO has yielded research that viewers are four times more likely to engage with an ad on Netflix than on other streaming services and 4½ times as likely compared to linear television (although I seldom believe this type of research). Starting this 4th Quarter, Netflix will offer Nielsen’s Digital Ad Ratings measurement to advertisers.

We will use multiple alternative audience measurement currencies



Lots of pre-upfront press but little detail at the upfront presentations because there really are no alternatives to Nielsen (although there may be some supplements). Nielsen is an industry-mandated monopoly. As long as these giant media companies lock themselves into long-term Nielsen contracts, as long as advertisers want consistent and stable trending data, and as long as potential competitors to Nielsen don’t provide something substantially better (with higher ratings), no one is about to spend the time and money it would take to actually get an alternative to Nielsen up and running. So the most we’re likely to see anytime soon are supplements to Nielsen and various optimizers, but not replacements. More measurement options and perhaps a better indication of what’s really going on, but not a true alternative currency.

There have been a number of attempts by sellers to work together to come up with Nielsen alternatives. A couple of years ago, NBCU led an effort to find something new, by seeking proposals from companies to develop new audience measurement systems. Now there is a joint industry committee (JIC) made up of all the major media conglomerates (except Disney). Since it can’t really

be an industry committee if it's exclusively made up of sellers, they reluctantly invited agencies to participate.



Disney isn't part of the joint industry committee primarily because, as they put it, "We own our own tech and we own our own audience graph (a proprietary tool which helps advertisers identify distinct segments of the audience across Disney's media properties)." It is "anchored in the industry's only scaled audience graph for streaming, with 250 million identifiers that represent 112 million households, across hundreds of thousands of audience attributes that paint a picture of your consumer."

Nevertheless, they said, "We are working with everyone, VideoAmp, Samba TV, and iSpot." "We're talking about measurement expansion...it's important to differentiate between measurement and currency. Nielsen will be the currency in this upfront." "We are going to be as flexible as possible on the measurement side, but from a currency perspective, no one has been able to scale currency to take the place of Nielsen today."

Fox didn't mention audience measurement other than to cite Nielsen data about how much Tubi has grown since Fox took it over. Although the network has previously said "We're already working with everyone. We're working with VideoAmp, iSpot, Nielsen." You can bring in your own data. We're agnostic when it comes to that because we don't feel that one company has won the race."

NBCUniversal, which had been the leading the charge for alternatives to Nielsen under Linda Yaccarino (who recently left the company to become CEO of Twitter), didn't focus on audience research during its presentation. But the company has previously been quoted as saying, "We're going to continue to offer our clients the ability to transact in a multi-currency world using data we

trust and have confidence in.” Last year, NBCU had a partnership with iSpot, and claimed that about 40% of NBCU’s upfront deals were “outside of traditional age and gender guarantees.”



Paramount Global has said, “If you want to guarantee on Nielsen panel only, we can do that. If you want to guarantee on the Nielsen panel plus Big Data, we have it in the system and can do that. If you want to guarantee on VideoAmp, we can do that. If you want to guarantee on ComScore, we can do that. So we’re coming in with four different currencies for guarantee.”

Warner Bros. Discovery mentioned that it was now using ComScore and VideoAmp in addition to Nielsen, but didn’t spend much time talking about it.

TelevisaUnivision focused more on alternative audience measurement than did the English-language networks, and for good reason. Spanish-language networks have long (and correctly) claimed that Nielsen under-counted their audience. They cited Nielsen’s own recent data indicating that Spanish-language TV viewers are under-represented by 29%. The company has its own two-year-old first-party Hispanic household graph data, which they claim 150 clients are using. They noted that up to 40% of U.S. Hispanics are missing from industry third-party datasets, and say its household graph covers nearly 100% of Hispanic households in the U.S.

Univision has worked with VideoAmp on new measurement currency, and is willing to work with any media agency holding company. They believe something like the joint industry committee has been long needed. They are looking forward to the upcoming Nielsen One cross-measurement platform, which will eventually add Big Data to its panel because “You can’t get cross-platform measurement without Big Data.”

New fall 2023 series



Upfront presentations have traditionally shouted that broadcast is still the biggest game in town, the best way to reach large chunks of viewers at one time, and still needs to be the foundation of any effective ad campaign. Not so for the past couple of seasons. Perhaps expanding the presentations to include every property a media company owns at the same time they are cutting the length of the presentations in half, makes it difficult to spend too much time talking about the new broadcast primetime schedule. Each company handled how much to tout their broadcast programming differently, with some giving more emphasis than others.

What used to be the centerpieces of upfront presentations, are now almost an afterthought – even though these companies’ linear programming is still their biggest profit drivers (and basically the only reason the upfront exists).



The effects of the writers’ strike was on full display at the **Disney** upfront. Except for two repeat episodes of *Abbott Elementary*, **ABC’s** entire fall schedule consists of unscripted shows. The only new one being *The Golden Bachelor* (*Bachelor* for seniors) – I thought they were joking, but apparently not. While some call this a strike-proof schedule, it’s more like an under-65-proof lineup.

Disney had more to say when it came to scripted programming on **Disney+**. *Loki* will be the first Marvel series on the streamer to get a second season. We also got some info on the new *Hawkeye* spin-off series, *Echo*, featuring Marvel’s first native American hero. Unlike other Marvel series that use the once-a-week model, all of *Echo’s* episodes will drop at once. It will be interesting to compare

the two methods, since *Loki* will be once-a-week. Disney also provided a preview of the upcoming *Secret Invasion* (with Samuel L. Jackson reprising his Nick Fury character), set to debut this June.

On the *Star Wars* front, three new series, the animated *Ahsoka* (starring Rosario Dawson), *Skeleton Crew*, and *The Acolyte* are slated for the 2023/24 season. *Ahsoka*, who's character first appeared in the animated *Star Wars: The Clone Wars*, as Anakin Skywalker's padawan apprentice, will debut on August 31st (Hayden Christensen will reprise his role as Anakin Skywalker).

We will also get Pixar's first episodic TV series for Disney+, titled *Win or Lose*, which follows several characters as they each prepare for a championship softball game.

Disney announced that the second season of **FX's** critically acclaimed comedy-drama, *The Bear* will return this June, and air exclusively on **Hulu**. Season 3 of Hulu's *Only Murders in the Building* will premiere this August, with Meryl Streep and Paul Rudd joining the cast. The only new scripted show mentioned for the streamer was family drama murder mystery, *Black Cake* (produced by Oprah Winfrey's Harpo Films production company). We also got a first look at FX's upcoming limited-series adaptation of James Clavell's 1975 novel, *Shogun*, which has been in the works for some time, and will also air on Hulu.



Paramount Global's CBS will have just two new dramas this fall. One, titled *Matlock*, which several critics have mislabeled as a reboot – Kathy Bates plays a lawyer who happens to have the same last name as the Andy Griffith character in the popular 1980s/90s series. The other is *Elsbeth*, with Carrie Preston reprising her role from

The Good Wife and *The Good Fight* as eccentric, but brilliant attorney Elsbeth Tascioni.

On **Paramount+**, *Star Trek: Discovery*, which helped launch CBS All Access in 2017, will have its fifth and final season in 2024 (*Star Trek: Picard* just finished its third and final season). And while they have announced spending cuts at the streamer, *Star Trek: Strange New Worlds* will premiere season 2 this summer, and has already been renewed for a third season. There will also be a new live-action *Trek* series, *Star Trek: Starfleet Academy* sometime in 2024. *Star Trek: Section 31* (with Michelle Yeoh set to reprise her role from *Discovery*) had been planned as a series, but will now be a Paramount+ film event (shooting has not yet started, and with the writers' strike, it could take quite some time before we see this one). The animated *Star Trek: Lower Decks* and *Star Trek: Prodigy* have both been renewed.

Paramount+ has also reportedly given series orders to, *Lawman Bass Reeves*, the fourth installment of the *Yellowstone* franchise, about the first Black U.S. Deputy Marshall west of the Mississippi, as well as reboots of *Flashdance* and *Love Story*, and series version remakes of *The Italian Job* and *The Parallax View* movies.



In a press conference before its upfront presentation, **Fox** cited uncertainty surrounding the writers' strike and resulting production delays as a rationale for being the only network not to release its weekly fall programming schedule. While asserting that "our development slate is robust, and we are strategically prepared to keep our pipeline full of originals," they also said that Fox has strong unscripted brands and franchises. And because of the long lead times needed for animated series, some of its signature shows should have ample episodes ready for the fall.

The network seemed high on two scripted shows, both given straight-to-series orders (no pilot), although neither is close to being an actual series yet. *Doc*, a medical drama hasn't started shooting, and *Rescue Hi Surf*, a lifeguard drama, has just started casting. Last year Fox was extremely high

on two new animated series, *Krapopolis* and *Grimsberg*. Neither made the schedule, but both are slated for some time next season.



NBC seems highest on a new comedy, *Extended Family*, starring Jon Cryer and Abigail Spencer as a co-parenting divorced couple (I hope they get rid of the really bad laugh track), *Found*, a missing persons drama that feels remarkably like Fox's *Alert: Missing Person's Unit*, and *The Irrational*, with Jesse L. Martin as a world-renowned professor of behavioral science who uses his unique insights to help solve high-stakes cases. NBC also gave us a peek at its mid-season, 10-part epic natural history wildlife series, *The Americas*, narrated by Tom Hanks.

The network also highlighted some **Peacock** series, including season 2 of *Dr. Death* (Mandy Moore is joining the cast), as well as a few new originals – *Apples Never Fall*, a limited-series mystery drama starring Annette Bening, Sam Neill, Alison Brie and Jake Lacy; *Twisted Metal*, a high-octane post-apocalyptic comedy-drama (based on the Playstation video game) with Anthony Mackie, Will Arnett, Neve Campbell, and Thomas Haden Church; *Based on a True Story*, a comedy-thriller about America's obsession with true crime stories, starring Kaley Cuoco (premieres June 8th), and *Those About to Die*, an epic story about the world of gladiators in ancient Rome, with Anthony Hopkins.

They are also high on a new romantic drama on **Telemundo** titled *Vuelve a Mi (Come Back to Me)*.

NBCUniversal also touted its upcoming 2024 *Summer Olympics* in Paris and the 50th anniversary celebration of *Saturday Night Live*.



Warner Bros. Discovery unveiled a number of new series across its various properties.



To coincide with the 2023 release of the *Barbie* movie (starring Margot Robbie and Ryan Gosling as Barbie and Ken), **HGTV** will air a new competition series, *Barbie Dreamhouse Challenge*. One lucky fan will win a stay at a real-life Barbie Dreamhouse, transformed by eight teams of HGTV stars). It's slated to debut this July.



The *Sex and the City* sequel, *And Just Like That*, returns for a second season on **max** in June. Conan O'Brien will have a new international travel, *Conan O'Brien Must Go*. Other scripted content on the way include new seasons of *Hacks*, *Pretty Little Liars: Original Sin*, and *Tokyo Vice*. There's also a new series in the works based on Stephen King's *It*.

TNT picked up season 2 of *The Lazarus Project* (a sneak peek will air after the Stanley Cup NHL finals game on June 3rd). Ellen DeGeneres is coming to **Discovery** with *Saving the Gorilla's: Ellen's Next Adventure* – her first project since ending her long-running syndication talk show. Jason Momoa will serve as the master of ceremony for *Shark Week's* 35th anniversary on Discovery. Selena Gomez will have two new series on the **Food Network** (she already hosts a cooking show on max). Also on the Food Network will be a new competition series, *The Elf on the Shelf: Sweet Showdown*. **TLC** will have a spin-off of *90 Day Fiancé*. **TBS** is reviving *Dinner and a Movie*, and will have a new prank competition series, *The Joe Schmo Show*. *All Elite Wrestling* is getting two more primetime hours. **ID** will have a new true-crime docuseries from Michael Bay, and Octavia Spencer will headline the network's *Lost Women of Highway 20*.



The CW, now 75% owned by Nexstar Media Group, has wasted no time cutting back on the network's high-cost superhero and other young adult shows, in favor of lower-cost series it could acquire from Canada or the U.K. (the network was previously a co-venture of CBS and Time Warner).

Nexstar is the nation's largest TV station group. It also owns *NewsNation* and digital news service, *The Hill*, *Antenna TV*, *Rewind TV*, and WGN Radio. Thirty-seven of its stations are owned-and-operated CW affiliates.

At their press presentation, the CW said, "We've been huddling for the last couple of months here to put this package of [network, broadcast, and digital] assets out there." "As we look forward to making this network bigger and profitable, and as much as we love these (superhero) shows, they had their time. They were not working on linear." "The way the CW was built before was not to have shows that maximize revenues for the CW. We need shows that are profitable...and we {are making} shows that we have more rights to." The CW had been reportedly losing \$100-150 million per year, but still made money for the studio operations of its majority owners (CBS and WarnerMedia) by selling the aftermarket rights to shows airing on CW. Going forward, "Unscripted is a strategy of ours, regardless of the writers' strike. Now there is a good 50-50 balance between scripted and unscripted programming."

The CW's primetime schedule is not only less costly than in the past, but they are clearly trying to broaden the network's audience. I've heard CW and some industry analysts say that CW is moving away from targeting Adults 18-34 to go more after 18-49. But CW hasn't really appealed to 18-34s for several years – its viewership has been more 35-49 than 18-34 for a while now. But the perception

has remained that CW is young, so now they may be able to sell to more advertisers (although its programming is not nearly as interesting as in the networks previous incarnation).

The potential of a writers' strike was one reason cited as to why they searched the world for shows they could acquire that already had at least a season's worth of episodes. The CW will have only one returning scripted series, *All American*, which returns for its sixth season. It will be paired on Monday with the cop drama, *61st Street*, starring Courtney B. Vance, which had been dropped by AMC after one season. Tuesday night will contain four comedies, three from Canada and one from the U.K. Wednesday will have two hour-long dramas, *Sullivan's Crossing* and *The Spencer Sisters*, both of which recently premiered in Canada. They are also reportedly planning a spin-off of *The Librarian*.

Saturday and Sunday afternoons will have the controversial LIV Golf Tour, as the CW continues to try and expand its audience. They see an opportunity here because as CW put it, "The regional sports networks are imploding. The cable networks are pulling back on sports. We have a lot of Saturday and Sunday real estate in the afternoons. You'll see a lot more sports on the network."

Here are the announced broadcast network primetime fall schedules.

The Sternberg Report

ABC 2023 Fall Schedule (new series in caps and bold)

	7-8	8:00	8:30	9:00	9:30	10:00	10:30
Mon.		Dancing with the Stars				THE GOLDEN BACHELOR	
Tue.		Celebrity Jeopardy!	Bachelor in Paradise				
Wed.		Judge Steve Harvey	Abbott Elementary (r)	Abbott Elementary (r)	What Would You Do?		
Thu.		Celebrity Wheel of Fortune	Press Your Luck			The \$100,000 Pyramid	
Fri.		Shark Tank	20/20				
Sat.		College Football					
Sun.	AFV	The Wonderful World of Disney					

Mid-Season: **Scripted** – 9-1-1, Abbott Elementary, The Conners, The Good Doctor, Grey’s Anatomy, HIGH POTENTIAL, Not Dead Yet, The Rookie, Station 19, Will Trent **Unscripted** – American Idol, The Bachelor.

CBS 2023 Fall Schedule (new series in caps and bold)

	7-8	8:00	8:30	9:00	9:30	10:00	10:30
Mon.		The Neighborhood	Bob Hearts Abishola	NCIS		NCIS: Hawaii	
Tue.		FBI		FBI: International		FBI: Most Wanted	
Wed.		Survivor			Amazing Race		
Thu.		Young Sheldon	Ghosts	So Help Me Todd		ELSBETH	
Fri.		S.W.A.T.		Fire Country		Blue Bloods	
Sat.		Drama Encores		Drama Encores		48 Hours	
Sun.	60 Minutes	MATLOCK		The Equalizer		CSI: Vegas	

Mid-Season: **Scripted** – TRACKER, POPPA’S HOUSE

The Sternberg Report

NBC 2023 Fall Schedule (new series in caps and bold)

	7-8	8:00	8:30	9:00	9:30	10:00	10:30
Mon.		The Voice				THE IRRATIONAL	
Tue.		Night Court	EXTENDED FAMILY	The Voice		Quantum Leap	
Wed.		Chicago Med		Chicago Fire		Chicago P.D.	
Thu.		Law & Order		Law & Order: SVU		FOUND	
Fri.		The Wall		Dateline NBC			
Sat.	Big 10 Pre	Big Ten Saturday Night (7:30-11)					
Sun.	Ftbl Night in America	Sunday Night Football					

Mid-Season: **Scripted** – La Brea, Law & Order: Organized Crime, Lopez vs. Lopez, Transplant, Magnum P.I., **Unscripted** – The Americas, America’s Got Talent, Deal or No Deal Island, Password.

CW 2023 Fall Schedule (new series in caps and bold)

	7-8	8:00	8:30	9:00	9:30	10:00
Mon.		All American		61st STREET		
Tue.		SON OF A CRITCH	RUN THE BURBS	CHILDREN RUIN EVERYTHING	EVERYONE ELSE BURNS	
Wed.		SULLIVAN’S CROSSING		THE SPENCER SISTERS		
Thu.		FBoy Island (R)		FBOY ISLAND		
Fri.		Penn & Teller: Fool Us		Who’s Line is it Anyway?	Who’s Line is it Anyway?	
Sat.		Masters of Illusion (8pm) (8:30 encore)		World’s Funniest Animals	World’s Funniest Animals (r)	
Sun.		“I Am” Documentary Films				

Mid-Season: **Scripted** – Walker **Undecided** – Superman & Lois, Gotham Knights, All American: Homecoming