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Disney

No. 75 | May 28, 2026

UPFRONT 26



2026 Upfronts. Source: The Walt Disney Company

MEDIA IMPACT REPORT

2026 Upfronts Recap

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How AI Scales Bias

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2026 Upfronts. Source: The Walt Disney Company

/BRIEFING ROOM

From Live Sports to AI: What Defined the 2026 Upfronts

By **Rachel Baker**, SVP, Head of Video Investment and Partnerships

The Rain CREW attended several 2026 upfront presentations this month in New York City. Top overarching takeaways include:

1. Live sports and events programming continue to be the anchor. Nearly every network leaned on sports, award shows, or other live events as their strongest source of scale, attention and viewing.
2. Technology, measurement and outcomes are table stakes. Many presentations stated that they are no longer selling reach, they are selling measurable business performance powered by AI tools, better targeting, clean rooms, commerce signals and outcome-based measurement.
3. Cross-platform scale can be achieved through streaming reach, premium content, and tapping into fandom for deeper audience connection. Companies are positioning themselves as more than just a TV network or a streamer—they are a multi-platform ecosystem built around fandom, franchise, creators, culture and streaming extensions.

NBCUniversal

NBCUniversal's 2026 upfront presentation leaned into NBC's 100-year legacy while previewing a 2026–2027 slate built around sports, entertainment, streaming, and new ad tech capabilities. Throughout the

presentation, the company emphasized year-round appointment viewing, stronger cross-platform measurement, and a broader content portfolio spanning NBC, Peacock, Bravo, Telemundo, and Versant properties.

- NBCUniversal presented its legacy as proof of long-term cultural relevance and a foundation for future innovation.
- A major focus was the company's year-round Sunday sports strategy built around Sunday Night Football, Sunday Night Basketball, and Sunday Night Baseball. NBC Sports also highlighted an additional NFL regular-season game on Saturday, January 2, 2027, with coverage split between NBC and Peacock.
- NBCUniversal spotlighted marquee tentpoles across its portfolio, including the upcoming FIFA World Cup across Telemundo and Peacock in Spanish.
- NBC previewed several new series for the 2026–2027 season: "Line of Fire," "The Rockford Files," "Newlyweds," and "Sunset P.I." Peacock and Bravo also featured prominently, with attention on returning fan-driven franchises including "Love Island USA," "Vanderpump Rules" and "The Real Housewives" as well as new originals like a scripted series based on the Fast & Furious franchise.

- The company stressed performance and accountability. It highlighted the expansion of their Performance Insights Hub, which provides a real-time view of how campaigns are performing across linear and digital, new live-event ad products such as Live Total Impact and Live Contextual and First Dib Moments, and a larger AI-enabled sales and optimization strategy.

FOX

FOX's 2026 Upfront presentation leaned into the company's identity as a media portfolio built around live sports, live news, bold entertainment, and ad-supported streaming. Throughout the presentation, FOX emphasized the power of real-time viewing, major fan communities, and Tubi's role in extending reach to younger streaming audiences.

- FOX highlighted its sports strategy as a core differentiator, with the FIFA World Cup serving as one of the company's biggest selling points for the coming year. The presentation reinforced FOX's long-standing emphasis on premium live sports as a driver of large, simultaneous audiences including NFL and MLB.
- Tubi played a major role in the pitch, positioned as a fast-growing ad-supported streaming platform that helps FOX reach younger and harder-to-reach viewers. Tubi can deliver both traditional scale and incremental streaming reach.
- On the entertainment side, they discussed a mix of returning franchises with newer programming, including the upcoming "Baywatch" reboot as well as a "Family Guy" spinoff called "Stewie," and "The Interrogator."
- Beyond programming, FOX highlighted advances in ad tech, audience insights, and research designed to help advertisers connect more effectively with fan-driven audiences and better measure business outcomes. Their AdStudio offers a converged audience graph, a contextual engine for scene-level targeting, and full-funnel measurement across more than 20 data partners, with the ability to plug directly into brands' own AI agents. Fox also announced Fox Creative Studios, a new IP development arm partnering with creators across genres.

- FOX sees itself as an "outlier" in the marketplace—smaller in scope than some competitors, but more intentional in the kinds of content and audiences it serves.

Amazon



2026 Upfronts. Source: Amazon

Amazon's upfront blended Prime Video, live sports, Twitch, podcasts, creators, and shopping data into a single pitch built around authenticated audiences and full-funnel outcomes. Rather than just a streaming service, Amazon emphasized its ability to connect brand storytelling with performance media across a broad consumer ecosystem.

- Amazon claimed that it offers scale with greater precision because of its authenticated consumer graph. This helps advertisers reach real households and better tie media exposure to business outcomes.
- Amazon Ads introduced Dynamic TV Creative, a new capability designed to personalize interactive ads on Prime Video based on shopping behavior and where a viewer is in the purchase journey.
- Live sports were a major focus, with Amazon reinforcing Prime Video as a year-round sports destination. Thursday Night Football remained central to the pitch, and the company also highlighted NBA, WNBA, NASCAR, NWSL, MLB, and broader live-event momentum.
- On the content side, Amazon promoted a slate of high-profile originals, renewals, and adaptations. Among the notable announcements were the series order for "Fourth Wing," updates on "The Terminal List," continued momentum for "Reacher" and "Fallout," and new developments tied to film and television talent partnerships.

- The presentation also showcased how Twitch, Wonderly, creators, and podcasts fit into Amazon's larger advertising proposition, extending the pitch beyond conventional TV and streaming inventory.
- Amazon's overall pitch was that it can unite upper-funnel brand moments with lower-funnel commerce signals, making it easier to move from awareness to purchase within one ecosystem.

TelevisaUnivision

TelevisaUnivision highlighted cultural fluency, live viewing, and the understanding that reaching U.S. Hispanic audiences requires more than translated creative or generic media plans. Across the presentation, they emphasized their ability to deliver scale through Univision, UniMás, ViX, creators, music, news, and sports, while presenting itself as a partner that can connect brands to audiences in-language, in-culture, and year-round.

- Hispanic consumers are too important to be treated as an extension of a general market plan. Cultural relevance and authentic connection are now essential to effective advertising to this audience.
- The company highlighted an expanded sports portfolio for 2026–2027, including the Spanish-language broadcast of Super Bowl LXI through an agreement with ESPN, continued CONCACAF rights, new CONMEBOL deals, Mexican National Team matches, and the Las Vegas Formula 1 Grand Prix on Univision.
- ViX was presented as a key part of the company's future, with the platform positioned as a way to extend reach across streaming, mobile, and younger audiences. TelevisaUnivision also spotlighted product improvements such as DVR functionality, alternative broadcasts, and expanded short-form vertical video programming.
- Award show Premios Juventud will evolve into PJ Fest, a multi-city, multiplatform cultural event. They also highlighted partnerships tied to artists and creators including Marc Anthony and MrBeast.
- TelevisaUnivision reinforced the continued value of telenovelas, reality franchises, and personality-led entertainment. One of the most talked-about announcements was the return of Don Francisco in a limited special series, designed

to tap both nostalgia and multigenerational audience loyalty.

- The company emphasized audience graph capabilities, data tools, and performance-oriented ad solutions designed to help brands connect with the Hispanic audience more precisely and prove outcomes more clearly. A partnership with Genius Sports will enhance Liga MX coverage, using advanced data to bring the games to life.
- A recurring theme throughout the presentation was that much of TelevisaUnivision's content is still consumed live, giving advertisers access to attention-rich environments shaped by emotion, community, and shared cultural moments.

Disney



2026 Upfronts. Source: The Walt Disney Company

Disney's 2026 upfront presentation was built around one central idea: fandom at scale. The company pitched that they can connect brands to audiences through live sports, cultural moments, premium storytelling, and a more unified advertising platform.

- Disney framed its portfolio as a collection of brands and franchises that generate deep emotional connection, not just passive viewership across sports, entertainment, film, and streaming.
- ESPN was central to the presentation, with Disney highlighting a 2027 live-event lineup that includes the College Football Playoff Championship, Super Bowl LXI and the Oscars. Disney introduced a new Sunday primetime show highlighting the best of women's sports. Disney+ will now be the home to the Savannah Bowl Championship and with MLB.TV, ESPN is now the streaming home to 2,000+ out of market games.

- One of the most notable announcements was that the Grammy Awards will air on ABC in 2027 and also stream on Disney+ and Hulu.
- Disney promoted upcoming titles and franchise momentum across Disney+, Hulu, and FX, including updates tied to Marvel, Star Wars, and new scripted series such as “Cry Wolf,” “The Land,” and “Count My Lies.”
- The company positioned ESPN as part of a wider connected ecosystem rather than a standalone sports brand, reinforcing the value of combining sports, general entertainment, and streaming under one sales story.
- Disney emphasized more automated, intelligent systems designed to help brands plan, buy, and measure campaigns. Disney Compass expands into Disney Compass Brand Portal, which gives unified views of brand performance across campaigns, category benchmarks, and soon-to-come AI-powered summaries to identify new opportunities. The portal will be integrated with measurement platforms like Innovid, VideoAmp, and EDO. Disney is also actively rolling out AI video tools to help brands create CTV-ready commercials and vertical ads tailored to streaming.

YouTube Brandcast

YouTube highlighted that advertisers should buy their media like television, but it should be valued for doing more than television can. YouTube was positioned as the leading streamer in the U.S. and framed creators as the new entertainment networks, while pitching advertisers on a system that blends premium video, creator trust, connected TV reach, shopping, and AI-powered campaign tools.



2026 Upfronts. Source: The Walt Disney Company

- A core theme was that creators are no longer just social talent—they are now treated as programming franchises in their own right. YouTube introduced a slate of creator-led shows and made them available for brand sponsorship in a way that more closely mirrors traditional TV partnerships.
- Among the better-known projects highlighted were “Keep the Meter Running” with Kareem Rahma, “Before the Steps” with Alex Cooper, and “Trevor Noah’s World Tour.” The broader message was that brands can now align more directly with creator-built premium content.
- YouTube made a significant push around the living room experience, introducing “Buy with Google Pay,” which enables viewers to complete purchases from ads on TV screens in just a few clicks.
- Product announcements included Custom Sponsorships, which use AI to surface content around a brand’s desired moment, and a new Masthead enhancement with a custom content shelf designed to create more immersive, branded environments.
- YouTube also introduced Affiliate Partnerships Boost, allowing brands to amplify creator videos that already feature tagged products, further connecting creator content to commerce outcomes.
- YouTube is integrating multimodal video creation tools powered by Gemini, Veo, and other Google AI tech to help marketers accelerate creative development.
- The platform also stressed improved measurement and shopping data integration, including new retail media connections through Google’s ad stack. The underlying pitch was that YouTube can support not just brand awareness, but more measurable sales impact.
- YouTube made the case that it should no longer be treated as an add-on to a video plan. It wants advertisers to see it as a central media buy that combines the scale of TV with the flexibility, interactivity, and accountability of digital.

Warner Bros. Discovery

At the Warner Bros. Discovery (WBD) upfront, the company acknowledged the uncertainty surrounding its broader business transition, but the core sales pitch stayed focused on premium

storytelling, sports, news, and lifestyle programming paired with stronger performance measurement.

- The company leaned on the power of HBO, Warner Bros., DC, and major scripted originals, including visibility for titles such as “The Pitt,” “Heated Rivalry,” and “Stuart Fails to Save the Universe,” as proof of cultural relevance and audience engagement.
- TNT Sports and live-event programming were a key part of the presentation, with WBD stressing the continued value of real-time viewing and fan passion. Although they lost NBA rights last year, sports remains strong with properties such as Bleacher Report, March Madness and NHL on TNT MLB playoffs, The French Open, Roland Garros, Nascar, Boxing, Unrivaled, Women’s Soccer and a new show from Shaq, “Dunkmaster.”
- CNN, HGTV, Food Network, and other unscripted and news brands helped WBD present itself as a more diversified media partner than just a premium-drama publisher.
- WBD wants to be seen as more measurable and more optimization-friendly. The company highlighted new attribution efforts, including participation in OpenAP’s conversion API initiative and the launch of an always-on measurement and attribution dashboard. Measurement will not only be about CPMs, but will offer reach guarantees.
- WBD emphasized audience engagement beyond traditional TV, including programming meant to connect with younger and more social-first consumers through creator partnerships and digitally amplified brands.

Netflix



2026 Upfronts. Source: Netflix

Netflix positioned itself as a scaled, global ads platform powered by premium entertainment, increasingly frequent live events, and a more sophisticated advertising stack. The company’s pitch combined audience growth, content momentum, and product development.

- Netflix said its ad-supported business now reaches more than 250 million global monthly active viewers, with over 80% of ad-tier members watching every week, reinforcing that it has moved from experiment to meaningful scale.
- One of the biggest business announcements was that Netflix will expand its ads plan to 15 additional countries beginning in 2027.
- Netflix highlighted a growing suite of AI-enabled ad capabilities, including tools to develop and optimize media plans, adapt creative for formats like vertical video and pause ads, and test AI agents that could eventually help manage and buy campaigns. This includes new personalized ad loads and frequency caps that dynamically adjust the ads based on viewing behaviors.
- The company highlighted more ad opportunities across video podcasts, vertical video on mobile, and fan environments such as Tudum, extending the sales story beyond traditional pre-roll or mid-roll streaming placements. Additionally, Netflix is expanding programmatic capabilities to Live and Pause Ads using dynamic ad insertion tech.
- Netflix continued to build its case in live programming, announcing expanded NFL coverage and spotlighting additional event programming such as the FIFA Women’s World Cup in 2027 and the Westminster Kennel Club Dog Show.
- Netflix showcased a wave of programming updates and reveals, including major franchises and creators. The presentation used that slate to reassure buyers that the company still has a deep bench of culturally dominant titles. Renewals of “Quarterback,” “My Life with the Walter Boys,” “Running Point” and “Big Mistakes.” New projects include “Myron Bolitar,” “The Retrieval,” and “Grown Ups 3.”
- Netflix wants to be judged not only on premium attention, but also on advertiser outcomes. Its

message to the market was that the platform can increasingly connect big entertainment moments to more accountable campaign performance.

Paramount



2026 Upfronts. Source: Paramount

As they have done over the past several years, Paramount framed itself as a more tech-forward media business built on premium storytelling, major sports, streaming scale, and deeper advertiser integration. Rather than stage a single showcase, Paramount hosted a series of more intimate events to emphasize transformation, focus, and a closer connection between content and brand outcomes.

- The company used the presentation to introduce advertisers to its post-merger identity under Paramount Skydance, with emphasis on momentum, creative investment, and the effort to build a more competitive modern media company.
- Paramount highlighted Paramount+ and Pluto TV as the core of its streaming proposition, with a focus on unifying both technology stacks. The move should improve the user experience, sharpen targeting, and create a more connected ad platform across subscription and free streaming.
- Paramount introduced Precision+, a performance-oriented product designed to connect audience planning with marketer outcomes, and promoted new capabilities such as conversion measurement support, more control over streaming ad placement, and premium fixed-position inventory opportunities.

- Sports, particularly March Madness and their new UFC opportunities, played a prominent role in the presentation. The company also highlighted dynamic ad insertion in live sports streams as part of its effort to make live inventory more flexible and more valuable for advertisers.
- Paramount positioned its film, television, and franchise portfolio as a premium environment for marketers. The upfront leaned on recognizable talent, Taylor Sheridan titles, CBS programming, and the broader studio narrative that strong storytelling creates stronger brand resonance. There was a strong focus of highlighting programming directed towards women with strong female actors.
- Paramount wants to be seen not just as a traditional content company, but as a platform combining entertainment, live events, and modern advertising infrastructure.





/NOTEPAD

AI Doesn't Create Bias, It Scales It

By [Julia Shabow](#), Senior Market Research Analyst

AI is already helping teams move faster, uncover insights, streamline workflows, and unlock creative possibilities. The opportunity now is to pair speed and scale with ethical stewardship of this technology, recognizing that AI acts like a mirror. It reflects who built it and what it's trained on. Every AI system learns from human-generated data and that data carries the full weight of our history: who held power, whose voices were centered, and whose were left out. For brands, what gets reflected can show up in campaigns, content, and the audiences you center or exclude — either building trust or quietly eroding it.

Why AI Scales Bias

AI systems learn by finding patterns in massive amounts of existing data. When that data reflects a world shaped by historical inequity, the model learns those inequities as if they were facts. Bias also enters through the algorithms themselves, vague or assumptive prompting, lack of review, and through a lack of diverse perspectives in the rooms where these tools are designed and tested. The problem isn't that AI invents new bias. It's that it scales existing bias, applying it faster, and with an air of objectivity that makes it harder to question.

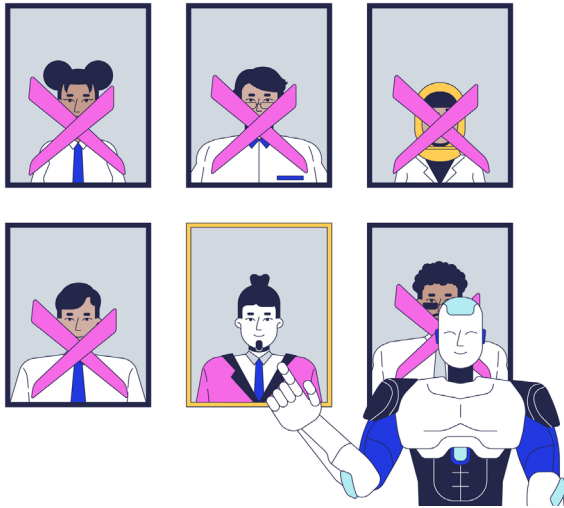
What AI Bias Can Look Like

Bias in AI isn't always obvious. Here are three documented examples of how it can show up in the work. These examples are not exhaustive. Bias in AI can affect people across races, gender, age, disability, sexual orientation, and more.

1. Visual Stereotyping: Generative AI tools have been documented producing racially and gender-coded outputs unprompted. Ask for a "CEO" and you're likely to get a Caucasian man. Ask for a "housekeeper" or "nurse" and the outputs shift, reflecting common stereotypes the model learned from its training data rather than any instruction given. In some cases, AI has also penalized or erased people depicted with darker skin tones or natural hairstyles, reinforcing narrow definitions of professionalism, beauty, or authority. These results highlight AI's difficulty reflecting real cultural nuance across audiences.

2. Content Framing: AI bias also shapes how existing content is interpreted, summarized and reframed. [A 2025 audit of Apple Intelligence](#) found that the tool often inserted stereotyped associations when summarizing messages or news content (for example, assuming a doctor is a man, or a nurse is a woman

without any supporting context). The same audit found patterns where Whiteness was treated as the default, tending to omit mention of race or ethnicity for White subjects while retaining it for Asian, Hispanic, and Black individuals. As AI summaries become embedded in phones, search, social media and other tools, these subtle choices influence how consumers perceive information, people and brands.



3. Western-Centric Data: Most AI systems are trained predominantly on English-language, Western data, and much of it comes from American-centric web content. Research has also found that language model outputs tend to align most closely with Western, English-speaking cultural values, even when used by global audiences. As a result, AI-generated copy may rely on humor, idioms, or references that do not translate well or lack local cultural nuance. This can quietly center a Western, often affluent worldview while sidelining other perspectives.

We Bring Bias to the Table, Too

We all carry unconscious biases shaped by our backgrounds, experiences, and blind spots, and those biases influence how we prompt, what we accept, and what we don't think to question. Layered on top of that are cognitive biases that kick in fast-paced business environments where speed and efficiency are constant expectations:

- **Expediency bias:** favoring quick, convenient outputs under time pressure.
- **Confirmation bias:** gravitating toward prompts or results that reinforce what we already believe.

How Brands and Agencies Can Use AI More Responsibly

1. **Don't let speed override judgment.** Tight timelines are not a reason to skip critical review.
2. **Use chain-of-thought prompting.** Ask AI to walk through its reasoning step by step. It exposes gaps and hidden assumptions; vague prompts won't surface.
3. **Avoid leading questions.** Prompts that pre-suppose an answer tend to produce one-sided outputs that confirm rather than challenge.
4. **Play the devil's advocate.** Ask AI to respond as a skeptic or someone who disagrees — it stress-tests outputs in useful ways.
5. **Reflect on what you're bringing in.** Your assumptions shape your prompts, and your prompts shape your outputs. That loop starts with you.

Diverse Teams Are Part of the Solution

Mitigating AI bias is not only about how we prompt, but also about who is in the room. When people with different lived experiences, backgrounds, and perspectives are using and reviewing AI together, the work gets stronger. Our collective, diverse human judgment is our most valuable asset. Recognizing bias in the tools, and in ourselves, is how we use AI responsibly and protect the integrity of our work — embracing the speed and efficiency AI can offer while keeping human review, discernment, and accountability at the center.





/UPDATES

Linear TV's Unexpected Comeback: What Advertisers Can Learn from the February–April Viewership Surge

By [Sarah Brennan](#), Director, Growth & Development, Rainstorm Direct

For more than three years, the narrative around linear TV has been clear: audiences are declining as budgets and attention shift to streaming. But early 2026 gave TV advertisers something to celebrate. Beginning in February and extending through March and early April, linear TV viewership ticked up—not as a broad renaissance, but as a reminder of where TV still delivers unmatched value.

When Big Moments Collide

The inflection point came in early February, when two powerful tent-pole events—the Winter Olympics Opening Ceremony and the Super Bowl—aired in the same week. Each reliably drives appointment viewing on its own; together, they reignited linear TV usage at scale, pulling lapsed viewers back and extending live viewing time. What followed proved this surge wasn't just a one-week anomaly.

A Focused—but Meaningful—Viewership Lift

The gains were not universal. Viewership growth was highly concentrated in news and sports, categories where live, real-time storytelling still matters most—and where linear TV continues to outperform.

From February through early April, news viewership remained elevated, driven by sustained coverage of the U.S.–Israel–Iran conflict, intensified political scrutiny, and national moments like the Artemis II moon mission launch. Fox News, MS NOW, and CNN led the category as viewers sought trusted, real-time information amid ongoing uncertainty.

At the same time, sports delivered consistency and scale. ESPN dominated engagement in March as college basketball and the NCAA March Madness tournament unfolded, holding attention well beyond marquee games through pre-game, post-game, and commentary programming.

Where Eyeballs Go, Dollars Follow

As audiences concentrated around news and sports, advertiser demand followed—driving increased competition and rising rates for premium inventory. In a market that feels more constrained, success depends less on chasing scarcity and more on planning with flexibility and intent.

How Advertisers Can Win in Coveted Inventory

1. Build a Multi-Layered Schedule

Blend program-specific buys for must-have moments with pre-emptible inventory at more efficient rates. Clearance can vary, but the cost savings often justify the tradeoff—especially in volatile news cycles.

2. Leverage Local Breaks

Local cable breaks provide access to high-quality national programming at a fraction of the national cost. While some markets may be covered, this variability further improves efficiency while maintaining broad presence.

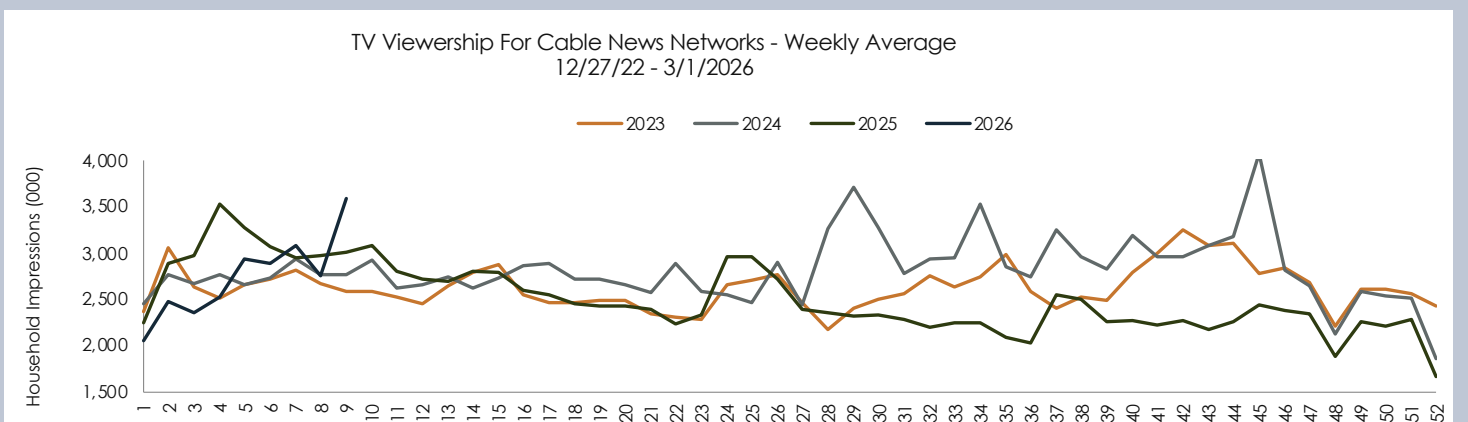
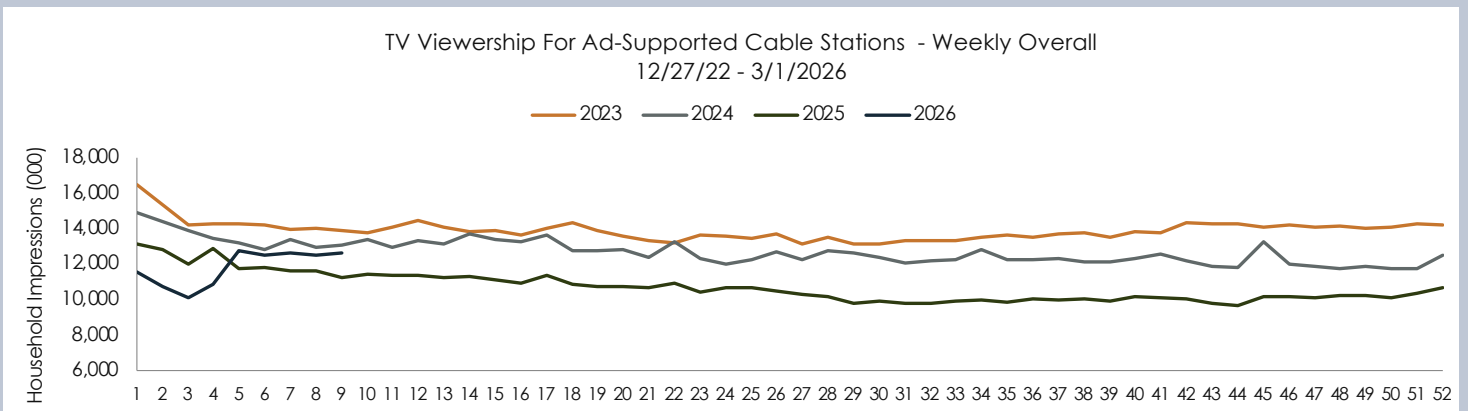
3. Surround the Moment—Especially in Sports

Advertisers don't need to be in the game itself to capture engaged audiences. Pre-game, halftime, post-game, and sports news programming offer strong contextual alignment at more accessible price points.

What This Moment Signals

The February–April viewership lift doesn't reverse long-term trends, but it reinforces linear TV's core role: delivering live news and sports at scale, where immediacy and shared experiences still matter most. In a fragmented media landscape, moments of collective attention are rare—and powerful. The advertisers who plan for them thoughtfully are best positioned to reap the rewards.

2026 Viewership seeing YOY increase starting in February



Source: Nielsen

/QUICK HITS



Google Announces New AI Mode Ad Formats And Agentic Commerce Tools At Google Marketing Live
[\[Marketing Brew\]](#)



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