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FAST and Furious: tubi and TV's Revenge

by J.D. Connor — USC School of Cinematic Arts

Tubi Interface Interruption | Super Bowl



From:

Contemporary Streaming Style



FAST and Furious: tubi and TV's Revenge
By J.D. Connor



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Curator's Note

The gag was pretty simple: Fox's Super Bowl announcers were maundering on, and someone

at your party had grabbed or sat on the remote—no, they definitely grabbed it—and was now surfing over to tubi? tubi?! and firing up *Mr. and Mrs. Smith*, the 2005 movie starring Brad Pitt and Angelina Jolie? Primordial sports-talk-radio outrage ensued: Who's got the remote? What are you doing? The game is on! By the time anyone figured out what was happening, it was clear that this was an ad, the tubi logo appeared, and we were out.

The 15-second spot might have sold for \$3.5 million, but it was essentially a house ad: the Super Bowl was on Fox, tubi is owned by Fox, and *Mr. and Mrs. Smith* is a 20th Century Fox movie, although, wait, isn't 20th part of Disney? The point of the ad was not just to let people know that tubi exists, but to stress just how easy it is to find something you truly want to watch once you get there. This platform is no IP-backwater shoveling out hundreds of hours of old episodes of *Cake Boss* (although, yes, it does that, too). The ad embodied now-standard interface habits: fluid passage from choice to choice, easy delimitation, distinctive soundmarks to let you know when you've scrolled from tile to tile or pressed enter or menu—to land on an island of prestige: a real movie—on demand. Anything to make tubi frictionless and desirable.



SKIP INTRO

By

Evan Calder Williams

tubi, like Pluto, xumo, Freevee, or the Roku channel, is Free Ad-Supported Streaming Television (FAST), the most important new sector in the streaming wars. (Technically, the ad was for tubi's AVOD, Addressable Video On Demand, service, but, again, this is a fluid toggle in the interface.) Like its FAST peers, tubi is wildly outperforming legacy channels in the cable bundle. As cord-cutters reach their budget constraints, they fall backward to less expensive or even free platforms, and viewing reverts to older models where providers sell ads against audience attention. At the same time, these platforms license huge amounts of semi-degraded IP from other producers, remonetizing it away from premium channels, raising their own profile in the bargain. tubi and Roku both signed dedicated channel deals with Warner Bros. Discovery that will funnel needed cash to the debt-bound studio while moving recognizable series out of the library and putting them in front of willing viewers.

The strategy is working amazingly well. Quarter after quarter, tubi is setting records for "total viewing time" (TVT), viewers, and revenue. The Super Bowl sold its ad inventory for about \$600 million, and that broadcast clearly spins off enormous benefits for Fox's other properties, including tubi. But over in its quiet corner of

what *Variety* calls “The Viewniverse,” tubi had revenue of \$200 million for the quarter—now reliably larger than the ad revenue on Fox. (Pluto is still larger, well over a billion a year.)

At Fox’s most recent **earnings call**, analysts asked how far the upside might go. The Fox execs stumbled and almost booted the answer because, at the moment, viewership is growing much faster than ads, a dangerous situation for a company that needs an area of massive growth to complement the low-growth live-TV offerings of sports and Fox News. Still, the likeliest outcome is that tubi’s revenue will climb significantly. \$2 billion a year seems possible within five years. And at Fox, unlike Netflix, there is no danger that an ad-supported streaming service will cannibalize premium audiences. The larger point is that the overall configuration of each conglomerate matters. Those shapes constrain corporate strategy and offerings, and they generate differing “model viewerships,” ringfencing disruptions according to those modes even as their interfaces converge like smartphone operating systems.

In the finale of *She-Hulk: Attorney at Law*, **Jennifer Walters/She-Hulk breaks the fourth wall** to object to the by-the-books Marvel Cinematic Universe boss battle that seems to be taking shape around her. Then she busts out of

her series Disney+ tile, swings over to the “Marvel Studios: Assembled” tile, kicks *that* image out of the way, and arrives on the studio lot to take up her grievance with Kevin. (Kevin Feige, we might think; in reality, K.E.V.I.N. turns out to be the AI behind the MCU.) “Assembled” is Marvel’s internal brand for behind-the-scenes content, a regular tile in the array, always featuring recognizable characters (here, Simu Liu as Shang-Chi) surrounded by anonymous crew members and the heavy-digital-industrial production equipment that makes the MCU go.

Where Marvel on Disney+ insists on high-tech, high-production-value, shared-universe innovation with a wink and a nod, tubi is announcing itself as the go-to platform for decent tv in a world of compounding financial constraints. You want to know, you *need* to know what is going on behind the scenes at Disney. Over at tubi, things are more modest: It’s free, but it’s good; it has, they are happy to boast, the deepest content library of any FAST service. Come find what you want or let us serve it up to you. Lean in, lean back, we’ll be here. Unbound by the need for hits; unthreatened by costly flops; unconcerned with superhero fatigue or (modest) economic downturns. Someday our ad inventory and rights costs will hit an

equilibrium, and we will face a profit squeeze, but that day is not today, not Super Bowl Sunday. Today, we interrupt this broadcast to let you know the alternative to tv is more tv.

tubi Free Ad-Supported Streaming Television (FAST)

Super Bowl FOX platform interfaces She-Hulk

Disney+

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