CFX DAILY
WHAT THE INDUSTRY READS FIRST

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DID YOU KNOW?

Nielsen released a new "Local NFL Fandom Index," which evaluates apparel purchases, event attendance, streaming, social media following, TV viewership, radio listening, betting intent and overall interest level. The top five feverish markets? Buffalo, Kansas City, Green Bay/Appleton, Cincinnati and Philadelphia. Los Angeles and New York ranked at the very bottom as "a wealth of entertainment alternatives and split team loyalties" dilute engagement.

NEW CEO, NEW ERA FOR ASTOUND

Astound is in the middle of a transformation, and that's before accounting for its pending merger with **GFiber**.

The independent operator announced in March that it would combine with GFiber, formerly Google Fiber, in a deal backed by Astound's parent and infrastructure investment firm **Stonepeak**. The transaction is expected to close in 4Q26, and the combined entity will be led primarily by GFiber's executive team. GFiber's current owner, **Alphabet**, will retain a "significant" minority share once the deal is finalized.

That announcement landed as Astound was navigating a leadership transition. *Jim Holanda*, who spent 15 years as CEO, departed earlier this year to take the top gig at **Cable One**. Then came *Ettienne Brandt* a week after the GFiber announcement, a telecom veteran whose résumé spans three continents and two companies that went on to be acquired in multibillion-dollar acquisitions.

"I tend to look at opportunities and say, where do I feel there's an opportunity for impact?" Brandt said in an interview with ***CFX***. "[Astound] is one of the largest independent telecommunications providers in the U.S., so it gives you a little bit more flexibility to do things, and you obviously have that scale, a great team of people—all the people I met during the process, I was very impressed."

Brandt's career has taken him from South Africa to London and across the Atlantic.

At EE, the product of a 2009 merger between T-Mobile U.K. and Orange U.K., he was part of the team that sold the company to **British Telecom** for $19 billion a decade ago. Brandt would later join **Frontier Communications** as EVP, Business in August 2022, where he led commercial operations through the provider's copper-to-fiber conversion and eventual $20 billion sale to **Verizon**.

When Brandt started at Astound in mid-March, his early assessment was that the operator had the capabilities to offer products customers would want. However, when he'd ask company leaders about Astound's unique selling proposition, the answers varied a bit too much for Brandt's liking.

"I always believe no matter what you do, no matter how good you are at anything, if you don't have that North Star and clear direction… you won't get the best out of anything," he said.

Brandt's response was a strategic reset built around a catchphrase he said came from Astound employees themselves: "Big enough to deliver, but small enough to care." Within that mantra are the four pillars of care, flexibility, community and value, in addition to a new initiative called the Astound Way, which standardizes systems and best practices across the company's footprint while preserving local flexibility through tiered market playbooks built around factors such as density and customer demographics.

The value pillar reflects Brandt's view that often-used promotional pricing models can become a strategic liability. Astound now offers customers a choice between a standard one-year rate with a disclosed price increase at renewal or a price lock that customers can buy into.

"The [cable] industry, as a whole, has had a bad reputation of giving you an attractive price and then giving you a rather large price increase after that," Brandt said. "We just don't think it's a sustainable strategy because you just end up with a lot of sales, but a lot of disconnections at the same time."

On competition, Brandt is candid that the intensity in broadband exceeded what he initially anticipated. He believes DOCSIS and fiber hold a durable throughput advantage over fixed wireless and is skeptical satellite providers will aggressively target the dense urban markets where Astound competes. But he acknowledges FWA has become "a fierce competitor, but not from a technology perspective." He believes fixed wireless has a leg up in the customer experience category due to its simple sign-up and set-up process.

"As a cable company, we offer more than just connectivity," Brandt said. "We offer phone. We offer television products. So we have a way more diverse portfolio. But the thing we've got to nail, and this is the industry as a whole, is getting ourselves to the benchmark FWA has set for ease of sign-up and getting rid of a lot of those barriers… I think it becomes a no-brainer in honest truth, because why would you pick an inferior technology if you get the same experience?"

That goal of easing access led to Astound launching an instant-on platform for MDUs. The first phase is already live, with plans to expand into new buildings as infrastructure is upgraded.

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While Astound remains a private company and doesn't publicly share subscriber figures, Brandt said the early returns have the operator in a hopeful place as a new chapter looms in a few months' time.

"We have seen a dramatic improvement in the performance of Astound that I'm very, very proud of, and the team's very proud of, in terms of taking the business and really going against the grain of what the rest of the industry is seeing, in terms of customer numbers," Brandt said.

SAY HELLO TO COX-CHARTER

Thursday is the big day when many **Cox Communications** employees will find themselves working for Spectrum, the consumer-facing name for the combined **Charter** and Cox. The merged company will change its name to Cox Communications within a year of closing. Cox Communications President *Mark Greatrex* will join Cox Enterprises CEO *Alex Taylor* on the combined Cox-Charter board. "I look forward to helping steer the combined company in providing great-value converged connectivity and seamless entertainment services. There are many complementary strengths of these two companies that can come together to serve residential and business customers even better," Greatrex said in a **LinkedIn** post that wished Cox colleagues well. Cox Enterprises, which will own approximately 23% of the merged company, still gets to fill one more seat on the combined company's board. Charter CEO *Chris Winfrey*, who is leading the merged company, will host a call with reporters Thursday. ***CFX*** will have all the details in tomorrow's issue.

MS NOW DTC SERVICE PREPS FOR LAUNCH

MS Now's long-teased DTC product will launch on Sept. 9. **Versant** is simply referring to it as The MS Now Membership, which it describes as an "additive experience" to the cable news net offering opportunities to interact directly with the brand's journalists, exclusive community features, new contributors and verticals and original creator content. It will also serve up 24/7 access to live streams and TV programming. The service is priced at $7.99/month or $79.99/year, but customers can also tap into an introductory offer of $39.99 for the first full year through Sept. 30. "Our Membership is the first step in a long-term strategy to deepen our relationship with audiences in ways that build on what they already value about MS Now, while addressing what consumers told us was missing from the news experience," MS Now President *Rebecca Kuyler* said in a statement. Unclear is whether pay TV subs will be able to authenticate into this DTC product, as with **ESPN** Unlimited and **Fox One**. ***CFX*** has reached out to Versant. The launch is coming as the news brand builds momentum on digital platforms, including more than 3.2 billion views across YouTube and TikTok YTD. Earlier this year, Versant CEO *Mark Lazarus* set a long-term goal for the programmer to diversify revenue streams beyond pay TV, where it's seeing continued sub declines. The company is also planning to launch a CNBC DTC product for retail investors this year.

MEDIACOM REBRANDS LOCAL TV NET

Mediacom rebranded its local community network **MC22** to Mediacom Local on Wednesday to create a stronger connection between the station and the broader cable brand. The new name is already appearing on-air in markets across the operator's 22-state footprint and on digital platforms. "With Mediacom Local, we are recommitting to that hometown focus and strengthening our role as a trusted, deeply embedded community resource," *Kristi Salmon*, Group VP of Marketing, said. The station covers local sports, community events, public affairs and other programming relevant to the communities Mediacom serves.

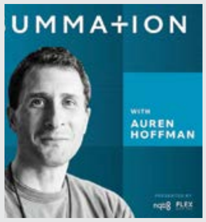
DIRECTV'S NETFLIX OFFER

Customers who sign up for one of **DirecTV**'s Genre Pack skinny bundles and a Gemini streaming device can now get 12 months of **Netflix** Standard with ads included, representing over $100 in value. The vMVPD is also highlighting simplicity as one of the perks of the deal—Netflix content lives alongside live channels on the Gemini interface as well as on the monthly bill. DirecTV currently offers five Genre Packs offering sports, news, entertainment, kids and Spanish-language channels.

SPARKLIGHT BUSINESS' NEW CLOUD PLATFORM

Sparklight Business launched **Unified Communications**, a cloud-based communications platform designed to help clients communicate and collaborate more efficiently. The product consolidates business calling, SMS messaging, video

What We're Listening to



We've heard plenty from NCTA Chief Cory Gardner on how AI depends on the connectivity infrastructure as well as how the growing demand for memory chips in AI is impacting broadband providers and other industries. But how is he personally using the tech?

"Probably not enough," Gardner told Auren Hoffman in the latest episode of his podcast "Summation"— a candid admission from someone who spends his days talking about AI's infrastructure demands. Like many, the NCTA President and CEO is using AI as an editor to check a memo or to create charts for presentations.

"It's remarkable—but you have to have the infrastructure to use it and the resources are real. I was visiting with one of the leaders of SK Hynix, about two years ago. They said if you were to ask generative AI a simple query about what the weather is like today in New York…That answer would require about 500 milliliters of water to cool the chips down from coming up with that. These are real public policy implications that we have to deal with."

The same infrastructure anxiety extends to spectrum. "If we don't get more [unlicensed] spectrum, it's going to create the same problem as with AI. The infrastructure just won't be there. We won't be able to realize the full potential of it at the user level, which is someone sitting in their home office or someone sitting at a factory often using WiFi," he said.

Gardner also pushed back on the idea that satellite internet could replace fixed home broadband with its low latency and symmetrical speeds. He did say NCTA members are talking to satellite internet companies about potential partnerships. "They may decide, 'Hey, look. It is not a business case for us to go out 100 miles to connect one house, but maybe we can work with you to find a solution for that family, that business, that farmer/rancher so we can provide them with very good internet that they don't have right now," he said. "Is it going to displace and work in highly congested areas? Probably not. Is it going to work with the speeds and size of data for the AI boom we expect to have and to blossom? Probably not. But are there opportunities and is it a good technology? Absolutely."

Watch the full podcast here. *– Amy Maclean*

meetings and collaboration tools all under a single secure platform that can be accessed in office as well as remote and hybrid work environments. Available across Sparklight's service area, Unified Communications is accessible via desktop and mobile devices, with businesses able to integrate **Microsoft** Teams and make business calls while keeping personal phone numbers private. Sparklight cited a Microsoft work trend index that found that the average employee now receives over 100 emails and 150 Teams messages per workday, which underscores the need for a simpler, unified business communications solution. The operator also talked up how Unified Communications can lower operational costs, as it replaces in-office equipment with a cloud-based phone system.

REVOLT HITS THE RING

Music-oriented cable net **Revolt** will air exclusive matches from TNA Wrestling's "Xplosion" program, beginning this fall. The new partnership also includes an archive of wrestling events on Revolt's platforms, with the two companies collaborating to explore the crossover between hip-hop, wrestling and their fan communities. The network's wrestling debut marks an expansion of its sports programming, which also includes the show "Revolt Sports Weekly." Meanwhile, TNA has been busy expanding its distribution footprint, relaunching its flagship "Thursday Night Impact!" series on **AMC** earlier this year, with wrestling content also streaming on **TNA+**, **Pluto TV**, **Roku** and **Samsung TV Plus**.

AWARDS

Midco received **Nokia**'s Breakthrough Award, which recognizes exceptional innovation, execution and partnership. This comes after the operator worked with the tech company to deliver a 400 Gbps connectivity solution to support AI infrastructure in North Dakota. The project, which was announced in May and completed in July, resulted in 200 terabits per second of total bandwidth and more than 500 individual 400 Gig service circuits.

PROGRAMMING

AMC Global Media's horror streamer **Shudder** set the schedule for its annual "Season of Screams," which runs from Sept. 1 through Dec. 31. It will feature weekly streaming debuts every Friday, including the movie "Parasomnia," a new season of "The Creep Tapes" and a fresh Joe Bob Briggs Halloween special, as well as plenty of library content, themed watch parties and the scene-setting Ghoul Log.

THINK ABOUT THAT FOR A MINUTE...

COMMENTARY BY STEVE EFFROS | STEVE@EFFROS.COM

Steve Effros was President of CATA for 23 years and is now an advisor and consultant to the cable industry. His views do not necessarily reflect the views of CFX.

ENOUGH SAID

Disney/ABC filed a lawsuit Tuesday against the FCC that accuses the agency of violating the media conglomerate's First Amendment rights. This isn't unique in the annals of the editorial conflict between broadcast licensees and the FCC; however, it's the highest-profile case in a long time. I doubt it will ever get to trial.

ABC is arguing that the FCC and Chairman Brendan Carr are using regulatory powers over broadcast licensees to intimidate, threaten and ultimately coerce them to either change the tenor of the content they present, or in this case, actually tell them what they must say. To suggest that this is a brutish violation of the First Amendment is to be kind.

You may remember that over the past year the president has been upset with ABC (and most other broadcast networks and news outlets) for various things they have said or done. The Jimmy Kimmel joke, political interviews on "The View" and several networks' decision not to carry the president's primetime "election security speech" come to mind.

It was in that election security speech that Donald Trump actually threatened, point blank, that the networks should lose their broadcast licenses for, among other things, not carrying the speech live on their linear channels (they all carried it on their streaming channels). Carr followed up on that suggestion by saying that the issue would likely be raised as part of an ongoing "early renewal" demand and investigation of ABC's licenses based on compliance with the administration's DEI purge. Carr said the issue was whether broadcasters' decisions "comply with the public interest."

ABC's legal filing is not subtle. It labeled the administration's actions as "an extraordinary demonstration of power and coercion." It categorized the threats and early renewal investigation as a "retaliatory campaign." It sure does look that way, especially since they included timelines of statements made by the president which were then closely followed by statements or actions by the FCC chairman. All of that would be part of any discovery process as part of the legal action. And that's why I don't think this case will ever get that far.

This is not a unique fight. It's the resurrection of a battle that occurred long ago at the FCC when it had the "fairness doctrine" rules. Endorsed by Congress in 1949, the rules required licensees to cover controversial issues and present balanced, contrasting views. The Supreme Court upheld those rules in 1969 based on the premise that broadcast distribution was unique and without significant equivalent technological media alternatives available.

However, the FCC in 1985, during the Reagan administration, subsequently studied the effect of those rules following the advent of cable TV and the explosion of new technology allowing for far more media, assuring open robust discussion of topics of public interest. It concluded that governmental interference with free and open journalism was injuring the public interest, not protecting it. In 1987, the Commission abolished the fairness doctrine.

Since this new case is going to be written about in the consumer press a lot, and there will be lots of political posturing on all sides, it may be instructive to read what President Ronald Reagan said when he vetoed a Congressional attempt to adopt a new "fairness doctrine" giving back more editorial power to the government again in 1987:

"Quite apart from these technological advances, we must not ignore the obvious intent of the First Amendment, which is to promote vigorous public debate and a diversity of viewpoints in the public forum as a whole, not in any particular medium, let alone in any particular journalistic outlet. History has shown that the dangers of an overly timid or biased press cannot be averted through bureaucratic regulation, but only through the freedom and competition that the First Amendment sought to guarantee."

"(The bill) simply cannot be reconciled with the freedom of speech and press secured by our Constitution. It is, in my judgment, unconstitutional. Well intentioned as (it) may be, it would be inconsistent with the First Amendment and the American tradition of independent journalism. Accordingly, I am compelled to disapprove this measure."

Enough said.