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WHAT THE INDUSTRY READS FIRST

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ICYMI

CFX Download unpacks what's next for Charter and Cox after the companies closed their mega-deal. We talk how Charter is rolling out Spectrum services across Cox's footprint, leadership updates and more! Tune in on [YouTube](), [Apple]() and [Spotify]() now.

CURIOSITYSTREAM BETS BIG ON LICENSING

As the industry maneuvers seismic shakeups, it might want to get curious about **CuriosityStream**. Created in 2015 by **Discovery** founder *John Hendricks*, it launched as an SVOD for factual programming. But as the streaming space grew more crowded, it has leaned into licensing, including for AI models. It has proved to be lucrative, making up 61% of its $23.2 million in total revenue in 2Q26.

CuriosityStream is led by veteran media exec *Clint Stinchcomb*, who spent years at Discovery and later launched **Poker Central**. In other words, he knows the media industry well—but he wasn't afraid to try something new. Stinchcomb's a big believer in an old adage frequently uttered by media mogul *Barry Diller*: Nobody knows anything about anything.

"You go back five years ago and certain companies were really concerned about the fact that they had licensed out their content. A lot of analysts said, 'Oh, you shouldn't ever license out any of your content,'" Stinchcomb recalled. "OK, maybe. But I think what the model proved was there's a balance. For any subscription service, you'd like to have some meaningful kind of brand definitional original content that's going to generate press and get people excited, but at the same time, you're going to need a breadth and depth of content to keep people there, which might be acquisition, not original, but also you know there's just a very long history of licensing content to outside of your own company, and that's what built a lot of media companies."

And there are more ways than ever to do that today, with CuriosityStream forging new partnerships for AI training with its audio and video. Stinchcomb doesn't think diving into AI deviates from the mission Hendricks had when he founded the company. "If our overriding objective is to help satisfy the world's curiosity through premium video that informs and inspires and entertains, we should be a part of the training of those models and have some small impact on sort of the resulting impacts of those models on the culture," he explained, adding that the content CuriosityStream licenses for AI training is a mere fraction of what it's acquired and amassed through its partners, largely through revenue share contracts.

Stinchcomb acknowledges CuriosityStream is a bit unique. It doesn't have IP like Batman to protect. But chances are most midsize programmers have at least a slice of content that they could license today. Does he think those companies should go try and negotiate a direct deal today or wait on a marketplace model like what Amazon is reportedly building?

"I don't mean to sound narcissistic, but the first thing I would do is call CuriosityStream," he said. "Obviously, we're going to take a piece of that. But if we do two deals, you're basically where you would be if you did one yourself. I think the challenge is you need a lot of volume and a lot of structure around content in order to get any kind of a licensing agreement done with one of the major players. That is a lot of work if it's not something that you're focused on as part of your core business."

While licensing is where CuriosityStream is seeing the biggest growth, it's still invested in its subscription business, recently scoring new launches in Mexico and the U.S. with **Apple**, **Sling**, **Dish** and other partners. May marked its best month in history for retention of involuntary churn. CuriosityStream reaches subscribers worldwide through the Curiosity Stream SVOD service. Then there's the **Curiosity Channel**, the linear television channel available via global distribution partners, along with FAST channels, podcasts and Curiosity University, which features talks from the professors at the world's most renowned universities as well as courses, short and long-form videos.

"It's reliable, recurring and very durable. That gives us a certain level of insurance to operate the business and to take a few swings in other places," Stinchcomb said of the subscription business. CuriosityStream will continue to push hard on subscriptions, but it did a reset and will no longer spend a lot of money trying to chase them. Instead, it's getting creative in marketing, taking advantage of library media service **Hoopla**'s BingePass, which gives users seven days of unlimited streaming.

Despite the AI pivot, Stinchcomb doesn't think the craft of storytelling is going anywhere. Five years from now, he predicts, the best content "will not look that much different than the very best content looks today"—AI tools might get creators there a little faster and cheaper, but he's skeptical the technology can yet replicate a well-told, 40-minute story.

Still, Stinchcomb is clearly having fun leaning into the new vocabulary that comes with the territory. An AI corpus (corpora is the plural form) is a large collection of data (video, text, images, etc) used to train and test machine learning models. CuriosityStream has already snapped up the domain "corpusmaximus"—a nod to the lingo that now peppers his conversations about AI licensing deals. He's not using it yet. But give it time.

NC GOV, INTEREST GROUPS STAND UP FOR DISNEY

One of the **ABC** stations owned by **Disney** up for early license renewal is WTVD, serving Raleigh, Durham and Fayetteville, North Carolina. On Friday, Tar Heel State Governor *Josh Stein* wrote the **FCC** in support of the station, which has served North Carolina communities for more than 70 years. "Section 326 of the Communications Act expressly provides that nothing in the Act gives the Commission the power of censorship and prohibits the Commission from imposing regulations or conditions that interfere with the right of free speech by means of radio communication," the Democrat wrote. "That statutory protection is particularly important when the government holds the power to determine whether a broadcaster can continue operating; even the perception that critical or unpopular reporting could invite regulatory consequences can have a chilling effect on what journalists are willing to report." Stein also argued that any unnecessary disruption in the license of WTVD or other broadcasters in the state could have a "devastating" impact

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on residents. Disney/ABC has sued the FCC over the early license renewal, accusing the agency of violating its First Amendment rights and retaliating through the license renewal process. On Monday, public interest group **Frequency Forward** and **Media Action Center** filed a motion to intervene as plaintiffs in Disney/ABC's lawsuit against the FCC, arguing that viewers need to be represented in the case. "The public airwaves belong to We the People, not to Disney, the ABC stations that it owns, or its shareholders," said *Sue Wilson*, founder of the Media Action Center. "We have already taken steps through the FCC's process to block backroom deals should Disney's corporate interest and the public interest diverge. Joining Disney's lawsuit to fight back against government intimidation and censorship gives viewers a voice in the process and makes clear that their First Amendment rights cannot be negotiated away behind closed doors."

CATHERINE COMMISSO NAMED MEDIACOM VICE CHAIR, EVP

Mediacom appointed *Catherine Commisso* as Vice Chair & EVP, Corporate Strategy and Administration, reporting directly to Chairman/CEO *Giuseppe B. Commisso*. Her role has her working directly with senior leadership on Mediacom's long-term direction and major priorities. A key area of focus will be developing and evaluating strategies to grow Mediacom's sustainable free cash flow over time, including through profitable revenue growth, operating efficiency and disciplined capital investment. Catherine Commisso was married to late Mediacom founder *Rocco Commisso* for 50 years. She will continue to lead Mediacom's established administration portfolio, including executive and administrative assistant support, Mediacom Park facilities, corporate travel and more. "My father valued Catherine's perspective and encouraged her commitment to Mediacom. I know she will help me carry forward the values he established while keeping our company focused on what comes next," Giuseppe Commisso said in a statement.

PSKY'S STATE SETTLEMENT SHENANIGANS

Settlement talks between **Paramount Skydance** and a coalition of states led by California AG *Rob Bonta* are off despite reports over the weekend that the two parties were ready to sit down this week. The meeting, which was to talk about potential remedies PSKY could offer to avoid the March antitrust trial over its $110 billion **Warner Bros. Discovery** merger, would have happened today had it not been for Bonta calling it off late Sunday, accusing PSKY of "leaking the alleged substance of settlement discussions" and "misrepresenting these discussions, demonstrating a lack of good faith." *WSJ* reported on the expected talks Sunday night, including agenda details and potential remedies Bonta would seek, such as keeping WBD movie studios separate from PSKY's operations. "We share AG Bonta's concerns about the public discussions and misreporting that surrounded this deal," PSKY said in a statement Monday, denying it leaked confidential discussions with Bonta's office. "We remain hopeful and stand ready to continue good faith discussions to resolve the Attorney General suit and move forward with our plans." Bonta said he is happy to meet with PSKY when the company "stops playing games and engages sincerely."

CNN, WBD NETS SUFFER TECHNICAL DIFFICULTY

CNN and other **Warner Bros. Discovery** networks, including **HBO**, went temporarily dark around noon ET on Monday. The news brand was airing "Inside Politics" at the time when the screen froze and pixelated, per CNN media reporter *Brian Stelter*. The signal returned at 12:51pm, with anchor *Dana Bash* welcoming viewers back and apologizing for the interruption, which she said was due to a technical issue across WBD channels.

ESPN RAISES DTC PRICES

ESPN didn't wait long after its DTC app turned one to announce it's raising prices, effective Sept. 17. The $29.99/month ESPN Unlimited subscription, which unlocks linear channels, SVOD and exclusive digital content the app has to offer, is going up to $31.99/month. The annual plan is now $319.99, up from $299.99. Customers signed up to the ESPN Select tier will also have to pay $1 more to $13.99/month or $10 more to $139.99/year. The **Disney+**, **Hulu**, ESPN Select bundle is now $21.99/month, up from $19.99, for the Basic ad tier or $32.99, up from $19.99, for Premium. The bundle with ESPN Unlimited will stay put at $35.99/month for Basic and $44.99 Premium. Eligible pay TV customers are able to authenticate into ESPN Unlimited with their MVPD credentials.

DISNEY EXECS OFFERED VOLUNTARY EARLY RETIREMENT PACKAGE

Disney is rolling out a voluntary early retirement offer for a limited time to veteran Disney employees at the director level and above as part of its ongoing cost-cutting measures. Those eligible must be 50 years or older and have been with Disney for at least 10 years. “This is one of several actions we’re taking to reshape our organization, including involuntary staff reductions that have already begun in some areas and will continue into next year,” Disney EVP, Chief People Officer *Sonia Coleman* wrote in a memo obtained by the trades Monday. In April, the company announced it would eliminate up to 1,000 jobs this year.

VERIZON INKS ENTERPRISE AI PARTNERSHIP WITH GOOGLE CLOUD

Two giants are joining forces to scale enterprise AI capabilities. **Verizon** signed a strategic partnership to deploy **Google** Cloud’s full-stack AI, which includes advanced data infrastructure and Gemini Enterprise. Verizon is working on an autonomous network intelligence framework and is using Google Cloud as a data platform partner to predict and resolve network issues before they begin affecting customers. Additionally, Verizon is using the suite of services to update marketing platforms by automating content and campaign creation, while also using Gemini Enterprise for agent orchestration. Plus, it already uses Gemini to handle a majority of inbound consumer calls and chats each month.

GCI EXPANDS 5G MOBILE FOOTPRINT

Alaskan operator **GCI** launched 5G mobile service in nine more areas, adding to the 100+ it has expanded to so far in 2026. The latest round came in Craig, Haines, Hydaburg, Kake, Klawock, Klukwan, Metlakatla, Skagway and Thorne Bay, giving customers in those communities access to 5G capabilities along with improved talk, text and data coverage. Funding was aided by the Universal Service Fund’s Alaska Plan and investments from GCI. The company’s 5G coverage currently spans 83% of Alaskans statewide.

ON THE CIRCUIT

The **T. Howard Foundation** is accepting applications for its [2027 Internship Program]. The foundation has placed more than 2,500 interns over its 33 years with companies such as **Warner Bros. Discovery**, **Comcast**, **AMC Global Media**, **Fox** and **Accenture**.

FIBER FRENZY

GoNetspeed began construction in Parlin, New Jersey, this week. The $4.5 million project will connect more than 3,100 homes and businesses to its fiber network offering symmetrical speeds ranging from 500 Mbps to 6 Gbps. -- **Charter** connected more than 8,000 homes and businesses in Citrus County, Florida, to Spectrum services, offering speeds of up to 1 Gig. The operator also connected 500 locations in unserved and underserved areas of Mason County, Michigan.

PROGRAMMING

Emily Compagno is joining **Fox News**’ “The Five” as a co-host starting Sept. 8. She’ll be alongside *Greg Gutfeld*, *Dana Perino*, *Jesse Watters* and others on the 5pm program. With the move, she won’t be returning to the Noon show “Outnumbered,” which will pivot to a rotation of Fox News personalities until it determines a full-time replacement. -- **PBS** will debut a one-hour film about “the functional art and enduring craftsmanship of the American West.” “Made in the West,” co-produced by Nashville PBS and Wyoming PBS, drops Sept. 4 at 9pm on PBS.

PEOPLE

Cox Mobile chief architect *Tony Krueck* is among the **Cox Communications** leaders joining **Charter** post-merger. His title of SVP, Strategic Product Development at Spectrum has him focused on product strategy and partner realization. Krueck joined Cox in 2014 after stints at **Telus** and **Sprint Nextel**.