

BY THE NUMBERS

Details from USTelecom's 2025 Broadband CapEx Report showed that 2020-25 is the highest sustained era of investment since the 1996 Telecom Act was signed, reaching \$90.8 billion per year. That just surpassed the \$85.6 billion spent from 1996-2001, and remains above the \$65.8 billion invested from 2002-08, \$69.2 billion from 2009-13 and \$78 billion from 2014-19.

CABLE TV'S CUSTOMER SATISFACTION GAINS

Traditional cable and satellite TV providers have something to smile about going into the weekend, thanks to **JD Power's** 2026 U.S. Television Service Provider Satisfaction Study. The [report](#), which was released Thursday, shows how MVPDs are continuing to make headway in customer satisfaction. This year's study, covering August 2025 through July, saw cable and satellite raise their score by 18 points YOY to a segment average of 549 (on 1,000-point scale).

"All year, their scores have improved in satisfaction, getting better and better all the way to an all-time high just in this last quarter of the year that we surveyed. A big improvement kind of across the board and across all of the different brands," JD Power Sr. Director, TMT and Utilities Practice *Carl Lepper* told **CFX**. "Heavy growth in resolving problems and complaints. So when customers call, and there's a problem, they're doing a better job of [resolving issues]. That could be AI-driven within some of these brands. The virtual assistants are helping people better and faster."

The study surveyed over 33,000 customers to measure seven categories: value for price paid, consistently delivering high-quality service, level of trust with provider, ease of doing business, people, digital tools and resolving problems or complaints. **Verizon Fios** leads the pack for cable again this year with a satisfaction score of 586 (+19 YOY), but second-place **Charter Spectrum** is closing the gap after increasing its score by a notable 28 points to 564. **Comcast Xfinity** rounds out the top three with 547 (+14).

Spectrum's gains are a key factor in the segment's improved scores this year. "They're separating from everyone else in a few ways. They're almost top marks in their people scores [i.e., interactions with support staff, call center agents, etc], so when they're contacted, it's going very well for them, and they're becoming easier to do business with... And then they seem to have done a very good job in their digital tools, so a lot of the soft skills they seem to be doing really well with," Lepper explained, noting that he's impressed Charter increased its scores so much while also navigating a merger with **Cox**. Of course, what will be really interesting to see is if Spectrum can maintain or improve its score next year once it's transitioned former Cox customers to its video product.

It wasn't long ago that Charter CEO *Chris Winfrey* [pointed out](#) that one of the big challenges the industry is facing today is that many consumers still don't trust cable providers, which is why operators have worked to deliver more simplicity and transparency with their offerings. Based on these JD Power results, video customers are noticing the effort.

"The level of trust has grown this year with [cable and satellite] brands," reaching a new all-time high this last quarter, Lepper said. "It feels like the people who have

stayed are starting to trust those brands more, and they're more of what they're looking for, [while] what's happening in the streaming industry is you have to buy multiple subscriptions to get everything you really want."

Ultimately, it's the streaming providers, including **YouTube TV**, **Sling TV** and **Hulu + Live TV**, that rank highest in customer satisfaction, with an average of 627, although that's a three-point decline YOY. In fact, satisfaction levels have remained relatively flat since 2024. One reason is that the "value perception" of streaming is declining, as pricing inflates and fragmentation increases the need for multiple subscriptions. Meanwhile, cable pricing is "becoming less painful" to consumers, according to Lepper. That's despite cable/satellite packages costing \$41 more per month than live TV streaming, which maintains a 99-point lead in the value for price paid category.

"The ease of doing business with streaming is getting harder. So one side's getting more difficult to work with and more expensive, and the other side's getting easier to work with," Lepper said. "[Cable/satellite providers] are maintaining their price, which is still high, but if you start adding up all the different streaming services, it's not that different anymore. There's an equalization happening with how much you're paying monthly for whatever you're watching, and that's a big player in why people cut the cord, and I think how the industry might change in the future."

Quality of service, which is highly weighted in the study, has also been a "real up and down" for streaming in the past year. It's what impacted YouTube TV's score, which is down six points YOY to 643. "That is one of the biggest challenges that they ran into this year. They also had an all-time low with value proposition, [but] they've rebounded from that," Lepper shared. The vMVPD's problem resolution, people and trust scores "all went way down" between October 2025 and January as well. But, despite the hiccups, YouTube TV still ranks No. 1 in the study overall, signifying cable/satellite still has a bit of ground to make up.

CALCULATING CHARTER-COX SYNERGIES

Charter-Cox initially gave guidance of \$500 million in Cox synergies, [updating](#) it to \$1 billion last week. But to **New Street Research**, the figure is still a little light. It's estimating \$1.2 billion in transaction synergies with potential upside from further scale benefits. "Transaction synergies are costs that evaporate when redundancies between the two companies are eliminated. Operating synergies emerge from applying Charter's operating practices to the Cox assets," New Street said, adding that operating synergies take time to realize and are difficult to quantify at this stage. The firm is basing its math on transaction synergies that will primarily come from consumer broadband costs once Charter's cost framework is applied to Cox. Video and mobile synergies don't factor in much since they have low penetration at Cox. Charter expects to grow both segments, which will see costs for them rise.

FCC'S BROADBAND SHOT CLOCK SETS OFF WAR

Get ready for the War of the Permitting Shot Clock. The **FCC** launched a proceeding in June to streamline wireline high-speed internet deployment by establishing consistent rules for permitting and fees by state and local govern-

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ments, such as a 120-day deadline to process wireline telecom broadband infrastructure permits. Comments aren't due until Monday, but states and municipalities have already been flooding the agency with objections. The Massachusetts Municipal Association claims a nationwide 120-day deadline would replace "careful, locally informed review with an arbitrary standard that fails to account for project complexity, public safety, infrastructure conditions, staffing limitations and sequential approvals." There's also concern over the FCC's proposal to restrict costs to the actual direct costs of managing public rights of way. **Cal Cities**, which represents California's 483 cities, argues that Congress never limited compensation to the incremental direct cost of processing an application. "California cities are already working to address significant pavement preservation, rehabilitation, safety and deferred maintenance needs. Restricting reasonable cost recovery risks requiring residents and businesses to subsidize private telecommunications deployment," said the association. On the other side are broadband providers who have complained for years that permitting is a chief barrier to deployment. **ACA Connects** is among those urging the Commission to adopt a strong presumption that major project reviews taking longer than 120 days are unlawful and that simpler projects shouldn't take more than 45 days. "The fastest way to expand broadband is to remove unnecessary burdens so local providers can invest, build cutting-edge networks and better serve their communities," said ACAC President/CEO *Grant Spellmeyer*.

CORNING TARGETS AI, DATA CENTERS WITH NEW FIBER PRODUCTS

Corning will showcase a slate of new fiber and connectivity products aimed at AI data center buildouts when it heads to Málaga, Spain, for the **European Conference on Optical Communication 2026** (Sept. 20-24). Leading the way is Corning's Contour Form Micro Cable, which the company says packs up to 50% more fiber into existing ducts and supports faster air-assisted installation for metro and long-haul AI interconnects. Corning is also highlighting its Multicore Fiber Solution, which fits four cores into a single strand for 4X the capacity within a standard 125-micron footprint, cutting connector counts by up to 75% and installation time by up to 60%. Also on display: the MMC connector with Prizm TMT Ferrule technology, a contactless expanded beam design built for high-volume, low-loss deployments and Corning's existing co-packaged and near-packaged optics portfolio for fiber-to-chip connectivity.

DISNEY+ ADDS PLAYLISTS

Disney+ added a new feature to help users enjoy a more lean-back experience. The streamer introduced Playlists, or themed collections of episodes and movies that play continually with full playback controls. Viewers can pick a playlist that's curated based on genre, franchise, character or mood, such as action and adventure movies, romantic comedies and movies made by Pixar. Disney+ also plans to roll out seasonal playlists throughout the year, so expect some Halloween-themed collections next month and a holiday one following after. Playlists have been rolling out worldwide this week and are available on the Disney+ homepage.

FIBER FRENZY

Wire 3 reached the halfway point on its expansion projects in Deltona and DeLand, Florida. The fiber provider is investing \$60 million to build out its network in the area and expects construction to be fully completed by the end of 2027.

PROGRAMMING

Hallmark set the schedule for the 17th annual Countdown to Christmas event, which will spread yuletide cheer 24/7 for 10 weeks, beginning on Oct. 16. This year's festivities will include 10 more original movie premieres than 2025 for a total count of 34 movies—the most ever for the event—with "Holiday Touchdown: A Bears Love Story" kicking things off on opening weekend. New movies will premiere on Friday, Saturday and Sunday nights. "Mistletoe Murders" Season 3 also arrives on Nov. 5. All Countdown to Christmas premieres will be available the next day on the **Hallmark+** streamer. – **AMC Global Media** kicked off production of a new drama series set in the world of **NASCAR**. "Thunder Road" will premiere on **AMC** and **AMC+** in 2027 and star *Dennis Quaid*.