CFX DAILY
WHAT THE INDUSTRY READS FIRST

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DID YOU KNOW?

VAB and Hub Entertainment Research found that Black (71%) and Hispanic (64%) audiences are more likely to follow at least one digital creator, compared to 55% of overall audiences. On top of that, 53% of Black audiences and 45% of Hispanic viewers are more likely to buy a brand or product advertised in a TV show featuring a creator they follow (43% overall). View the full report and insights here.

GARDNER FACES MERGERS, CHANGE AT NCTA

Cory Gardner recently added a few personal touches to his still somewhat spartan office at **NCTA**'s HQ, a fitting backdrop for how he jumped in as the television and internet association's president and CEO in September 2025. After just a week on the job, the former U.S. senator from Colorado was on the main stage of cable's largest trade show, **SCTE TechExpo**, interviewing **FCC** Chairman *Brendan Carr* and House Commerce Chair *Brett Guthrie*.

"The first year was absolutely external... They really wanted me to establish a new presence for NCTA, to go out and show that presence and establish that first call of urgency that the board was looking for, and I think we've been able to accomplish a lot of that," he said in an interview with ***CFX***, pointing to his multiple op-eds, podcast appearances and meetings with both association members and lawmakers.

Now, he's starting to focus on some of the internal doings at NCTA, including his office. He's added a Denver Broncos helmet. There's a red model tractor, a nod to his family's multigenerational farm implement dealership. And then there's this 100+ year-old sales book from his family's farm. Small and red leather, he cherishes it in a way reminiscent of how someone might hold a family Bible.

"This has a listing in here of every single farmer in America who they knew of at the time that had gotten rid of all of their horses, and had switched to tractors," he explains, pointing to an entry for *Anton Abbey* in Molt, Montana, with 640 acres. The slim volume tackled everything from cost savings to some of the broader consequences.

The book talks about how "if there's nothing but tractors, then we're just going to have factories, and there won't be any farmland left... Well, that's the AI data center fight, right? So it's very similar to what we have today," Gardner says. "What I've discovered in the last year is, we're still dealing with 100-year-old questions of change. Our changes are happening faster, and they're closer together. So, as an organization, we have to evolve to be that nimble as well, to recognize the change, to embrace the change. Somebody from the outside looking in, I think, has a new chance to do that."

Gardner is getting a crash course in change with some of NCTA's largest members merging in the past few months—**Charter** and **Cox Communications** along with **Paramount Skydance** and **Warner Bros. Discovery**. He admits that the transactions will probably change the association in ways not yet clear, but said NCTA is excited about it. "I think the opportunities that come with that better competitive position of our companies will overall help the industry," he said, suggesting the combined companies provide "greater reach, greater technology, greater depth."

The mergers have changed the board composition of NCTA, with outgoing Cox Communications President *Mark Greatrex* passing the chairman role to Charter President/CEO *Chris Winfrey*. Gardner said last week's board meeting felt different without the former

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Cox exec, who he'd leaned on heavily in his first year at NCTA. Charter has shown a strong commitment to the association over the years. Skydance, the name for the company now housing Paramount and WBD, is supportive too, according to Gardner. **Skydance TV** Co-Chair *George Cheeks* is one of NCTA's board members. After last week's board meeting, NCTA took congressional staff on a tour in New York that included a stop at Paramount and one of its **CBS** affiliates. Gardner said NCTA continues to press issues important to the company, like film incentive tax credits.

As video has moved more into streaming, the intersection of the cable operator and programmer is not as defined as it once was, but NCTA continues to count both businesses as members. Gardner doesn't see that changing. "Because they really do make each other better, and they need each other," he said. "For instance, if you look at the opportunities that a programmer could create for the operators, what if they delivered an experience that only our operators can provide?"

He pulled out another farm analogy, saying content companies can "put more grain" into the machine to keep it full, whether that be 8K or 16K video or an experience like Charter's Spectrum Front Row, providing live sports streaming through the **Apple** Vision Pro.

Of course, all this industry consolidation means that there are fewer companies writing checks. Not just for NCTA, but for the various industry groups the association has supported for decades. Last week, the industry gathered for **NAMIC Next** and **The WICT Network** conferences, as well as the **NCTA Education Foundation**'s annual **Kaitz Event** fundraiser that supports those groups and others focused on the industry's talent pipeline. What's NCTA's role in keeping these groups going?

"I have talked to many of them about ways that we can help provide support, ways that we can help provide efficiencies, ways that we can provide partnerships and collaborations to keep important programs going," Gardner said. "But I think the industry has some really good programming within many of these institutions that should continue, and we can figure out ways to make them last and help partner with each other to do that."

With the industry combining, he said it presents an opportunity to come together and look at what Kaitz and the Foundation looks like: "I think the future is unlimited when it comes to finding these ways to work together." Gardner said the topic came up at last week's board meeting, but "it's not a new conversation," and there are no new decisions at this point.

Does all this change open the door for NCTA to broaden its membership base? There have been some new members. **Versant** joined after it was spun off from **Comcast** this year. It's added some affiliate members on the networking hardware side, including **Alvian Networks**. On the flip side, Warner Bros. Discovery let its membership lapse in January 2025. **Optimum** left the association in 2018. "There's other developers out there on the programming side that we should look at, like gaming and things like that," Gardner said. "And there are others that used to be members that aren't, and I certainly welcome [them back]." But he said NCTA won't change its membership in ways that hurt existing members.

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Gardner's internal work at NCTA is just beginning. With Chief of Staff *Nilda Gumbs* departing after nearly 32 years and economist *Rob Rubinovitz* retiring, Gardner said he's rethinking how the organization is structured. Economics and research, for instance, is moving under the technology department. He said he doesn't use the chief of staff role the way it was used in the past, but that the communications post recently vacated by 20-plus-year vet *Brian Dietz* will be filled, though he had no announcement yet. Gardner said the first year was about being out front, but "I think we're coming up on an internal phase."

Part 2 of our conversation with Gardner, covering NCTA's policy priorities, publishes tomorrow.

DEMS URGE FCC TO DROP E-RATE PLAN

Congressional Democrats are pushing back on the idea that cutting the **FCC**'s E-Rate program ultimately protects children. Sen. *Ed Markey* (D-MA), who authored E-Rate when it was created out of the '96 Telecom Act, and Senate Democratic leader *Chuck Schumer* (D-NY) led nearly the entire Senate Democratic Caucus and more than 60 House Dems in a letter urging FCC Chairman *Brendan Carr* to withdraw the agency's proposal to eliminate or limit the program. The FCC voted in June to open a review on E-Rate's future, and the record is filling up, with recent filings from **ACA Connects**, **INCOMPAS** and **NTIA**—not to mention Sen. *Ted Cruz*'s (R-TX) report pressing for changes to E-Rate this week. In the letter, the lawmakers pointed to E-Rate's reach, noting it helped more than 158,000 schools and libraries pay broadband bills, add bandwidth, maintain WiFi networks and replace aging infrastructure in 2025. They said cutting the program would impose cost burdens on schools, potentially diverting resources away from teachers, staff, instructional materials and other needs. While the lawmakers said they support efforts to address excessive screen time, they believe states and local communities are the appropriate places to set device rules. They also warned against using child safety as a pretext to dismantle E-Rate, adding that the program shouldn't be limited to rural communities either. "Excluding urban communities would strip support from many of the nation's highest-poverty schools and libraries… A student's access to educational opportunity should not depend on whether the FCC considers that child's community sufficiently rural," the letter read.

NAB, NEXSTAR WANT TO UNPAUSE OWNERSHIP CAP PROCEEDINGS

Well, no surprise here. **NAB** and **Nexstar** each filed their opposition to a petition asking to stay the **FCC**'s order that officially repealed the 39% national broadcast ownership cap. Ten state cable and broadband associations filed the petition earlier this month, also pledging to file a petition for review in a Court of Appeals. However, both NAB and Nexstar don't think the groups have met the standards for a stay, including whether they would suffer irreparable harm without one. NAB claims that the petitioners also fail to make a strong case for why they'd prevail on merit, considering their rationale "largely rehashed the same arguments the Commission already has rejected on well-reasoned and fully explained grounds in the National TV Cap Order." Meanwhile, Nexstar targeted petitioners' claims regarding retransmission consent rates and the possible increases in costs that could come if the 39% cap is fully repealed. "Petitioners' irreparable-harm theory rests on hypothetical increases in retransmission consent rates (that they themselves set) that may come about from future transactions. But speculation based on future contingencies cannot demonstrate harm that 'is of such imminence that there is a clear and present need for equitable relief,'" Nexstar wrote. On top of the 10 state organizations, a separate petition was filed by **Public Knowledge**, **Free Press** and several others.

RATINGS

ESPN just had its most-watched WNBA Playoffs in history, averaging 1.4 million viewers across eight games through the semifinal round. That's up 23% vs the comparable point last season and follows ESPN's most-watched WNBA regular season ever (1.4 million). Highlights include the P2-17 audience growing by 29% and the P18-24 demo going up 27%. This year's WNBA Finals begins Saturday, with the series' TV responsibilities split between **NBC**/**Peacock** and **USA Sports**.

SKYDANCE NETS' CONCERT FOR NEW YORK

Their owner has changed a few times, but **MTV**, **VH1**, **MTV2** and **Logo** are keeping the same spirit as they did 25 years ago when they originally aired "The Concert for New York City" after the 9/11 attacks. The portfolio of **Skydance TV Networks** will re-air the event Tuesday from 7pm to midnight, featuring the likes of *Paul McCartney*, *Jon Bon Jovi*, *Billy Joel*, *Jay-Z*, *Elton John* and more. Proceeds will go to the Robin Hood Relief Fund. Viewers can donate here as well.