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WHAT THE INDUSTRY READS FIRST

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## SPOOKY NUMBERS

The horror genre is enjoying a surge in popularity, but interest isn't just isolated to the spookiest month of the year. Roku reports that 91% of horror movie searches happened outside of October in the last 12 months, with horror fans searching for six horror movies per year on average. Of course, October is still king: in 2025, 40% of all Roku searchers in the U.S. were looking for Halloween content (up from 35% in 2024)—averaging over 3,000 searches for Halloween movies every single minute!

# CTAM SKIPS THE PARTY, EYES WHAT'S NEXT

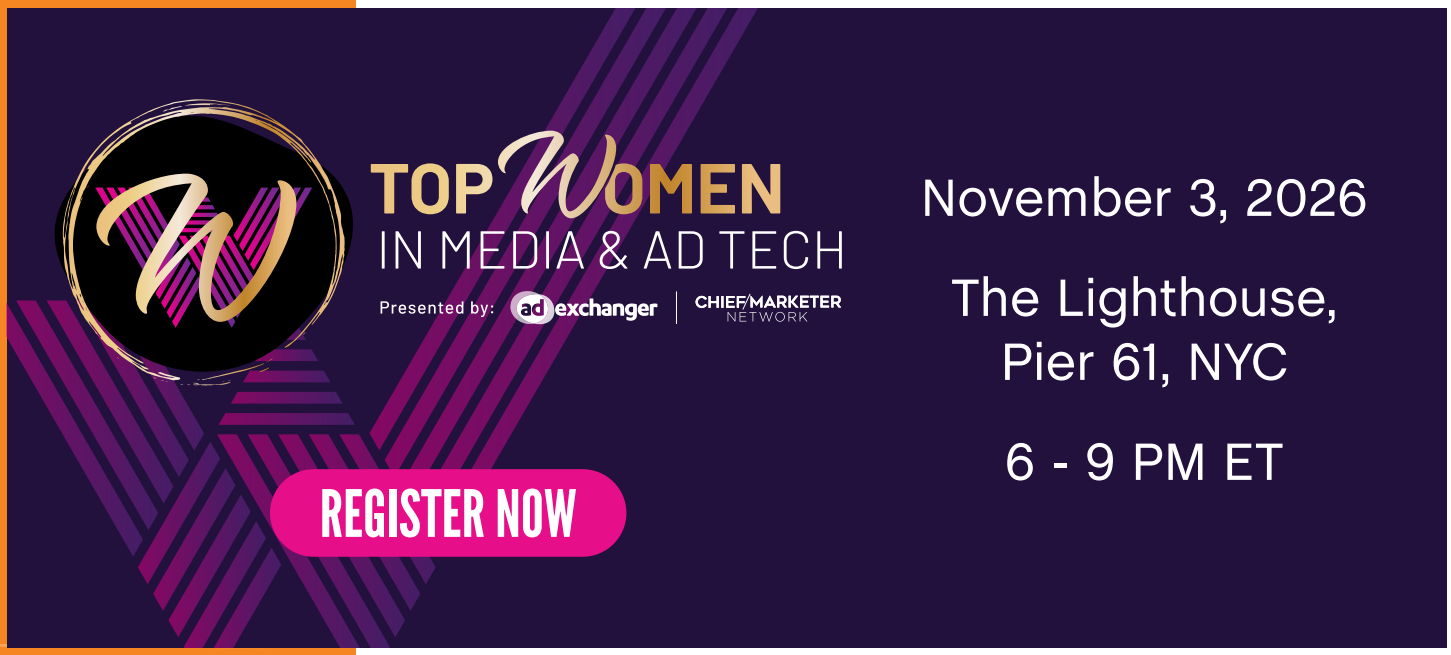
There's a lot of focus right now on how fast the industry is changing, but it's something marketing association **CTAM** has actually witnessed for years. *Vicki Lins* has led the organization for a decade and has never had two board meetings back-to-back with the exact same people at the table.

"That's a reflection of the consolidation. It's a reflection of the restructurings. It's all of it. At that level of change and shifts that are constantly happening, the level of distraction is everywhere," the CTAM President/CEO told ***CFX***. "We play an important function as a safe harbor for our members, where we can help them reduce the noise and eliminate some of the distraction and just come together to focus on the work at hand."

This year marks CTAM's 50th anniversary, something you might expect a group of marketers to blow up. Instead, the association is leaning into what's next. It changed its name to just CTAM, stopped worrying about what the C stands for and has moved beyond "cable" just as its members, now a mix of streamers, studios and MVPDs, have.

"We feel that CTAM is truly built for what's next. It's just in our DNA. So, we came at this [anniversary] kind of low-key," said Lins, pointing to the org's subtle new logo with 50 embedded into it. "Nobody needs more noise and more distraction," she said of the low-key approach.

CTAM has evolved many times over 50 years. It began by helping facilitate distribu-




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tion deals, once ran the popular **CTAM Summit** and has since shed its awards, paid events and chapter-based membership for corporate funding and a work-focused model. Lins said it now acts more like an agency than an association, rolling up its sleeves with members on their biggest business problems.

The tradeoff is visibility. When thousands attended Summit (and its legendary parties), the association touched nearly everyone in the industry. Now that it's built a model that revolves around working groups, Lins acknowledged that there are people who may never encounter CTAM directly. Plus, its marquee efforts don't have the high profile of the TV Everywhere efforts it led. Piracy and fraud work isn't "as sexy as TV Everywhere, but it is important, valuable and it does save revenue for everybody's bottom lines," she said. "A lot of the work is equally important, just not as easy to discuss."

She embraced the idea that CTAM now operates something like a think tank, with its board as the brain trust. But she said some of what's coming in 2027 and beyond is on the scale of TV Everywhere, the kind of effort where people will say "CTAM owns that."

One of CTAM's top priorities is AI, with the org recently launching a formal initiative aimed at helping members apply it in ways that improve customer experiences while protecting customer trust. It published an "Answer Engine Optimization Playbook" to assist members in strengthening brand visibility in a zero-click world. Lins likened the effort to TV Everywhere, where CTAM helped create an industry-wide framework.

"There's collective lift here, and that really mattered for the success and execution of TV Everywhere. That's how we're approaching AI… If we can create a framework on how to approach it, with the focus being on competitive positioning, strengthening the business and enhancing the consumer experience, that's the big win for the industry," she said.

User experience is also on CTAM's radar, with Lins describing some of the "messiness" in the space as an opportunity. CTAM sees its anti-piracy work as a competitive issue. "Those pirates are stealing eyeballs, and customers, and revenue and acquisition opportunities from our businesses," said Lins.

CTAM's members include streamers like **Hulu**, **Peacock**, **Tubi** and **AMC+** along with their linear brethren. **Charter**, **Comcast**, **Optimum**, **Mediacom**, **Armstrong**, **Cable One** and **GCI** make up the MVPD side. Vendor members include research firm **HarrisX** and **TK Interactive**, a software company specializing in AI and data intelligence.

"We're constantly reevaluating our membership—who needs to be in the tent to make this work most meaningful, most impactful, most relevant, and who are we concerned about having in the tent because the competitive landscape has shifted and having them part of the conversation will hinder the conversation," Lins said. "I will say that right now there's much more of an open mindset to redefining the word industry and being more all-encompassing, understanding that all of the players in the industry have some sort of impact to bring that affects everybody else. A lot of our work can be defined in a way that makes it comfortable for everybody to be having those conversations together."

Years ago, the CTAM board created a category called Participants–sort of a semi-membership level for companies that may not fit into all the conversations, but have an important role to play. The first two Participants were **Google** and

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**cablefax.com**

EDITORIAL
**Editor**
Noah Ziegler, 301.354.1704, nziegler@accessintel.com

**Senior Editor**
John Saavedra, 908.477.1758 jsaavedra@accessintel.com

**Editorial Director**
Amy Maclean, 301.354.1760, amaclean@accessintel.com

**Editorial Director, Ad Tech & Convergent Media**
Sarah Sluis, 212.621.4706, ssluis@accessintel.com

ADVERTISING/BUSINESS
**Chief Revenue Officer**
Dave Colford, dcolford@accessintel.com

**VP Ad Tech/Convergent Media**
Gordon Plutsky, gplutsky@accessintel.com

**Advertising and Sponsorship**
Vernesa Merdanovic, vmerdanovic@accessintel.com

MARKETING
**Senior Marketing Director**
Jessica Dombrowski, jdombrowski@accessintel.com

PRODUCTION/CLIENT SERVICES
**Sr Production Manager:**
Joann Fato, jfato@accessintel.com

**Group Subs:** Vernesa Merdanovic, vmerdanovic@accessintel.com

**Subscription Questions:**
Client Services: 301.354.2101, clientservices@accessintel.com | Annual subscription price: $1,999.00/yr

**Access Intelligence, LLC,**
9211 Corporate Blvd., 4th Floor, Rockville, MD 20850

**Facebook**. She noted that neither is currently active, but participation is often cyclical based on what's happening in those businesses. "They're a good example of the type of company that sort of moves in and out, and you know the lines between tech and media are blurring in really interesting ways too."

Lins sees the industry, and CTAM with it, at an inflection point that's still taking shape, but she's optimistic about the "new frontiers" it's bringing. "We're pioneers by nature," she said. "We don't know what they fully look like yet, but we can see the first steps of where it might go, and I think it could be a lot of fun, and certainly will be really challenging."

## SCRIPPS LAYOFFS

**Scripps** conducted another round of layoffs this week, cutting 431 positions, representing 10% of the broadcaster's workforce. That brings total job cuts at the company to approximately 850 employees in 2026, including layoffs in the summer that trimmed 12% of its workforce. But Scripps is also creating over 100 new positions this week that support an "enterprise-wide transformation" that includes embracing more AI tools at local stations. "We aim to fill as many of these new roles as possible with colleagues whose positions have been affected," CEO *Adam Symson* wrote in a staff memo obtained by the trades Tuesday. Execs at last week's **NAB Show NY** stressed that the changes in its newsrooms are meant to empower more on-the-ground reporting and community connection. The new positions will reflect this focus on local reporting and outreach. Scripps is also transitioning its news operation to a 24/7 streaming model, including anchor-less newscasts at some stations. Symson wrote in a LinkedIn blog post last week that viewing hours jumped an average of 23% since stations began launching 24/7 streams, with viewers watching 10 minutes longer on average. "Four of our pioneer stations (Tallahassee, Green Bay, Waco and Tucson) are averaging nearly 70% growth in hours of viewing after just eight weeks. And it is not at the expense of our linear TV performance, which has remained stable," Symson said. The broadcaster reports 3Q26 results on Nov. 5. Ahead of that, Scripps raised its guidance for full-year 2026 midterm political advertising revenue from $225-250 million to approximately $275 million, which is about 40% above the 2022 cycle. 3Q political rev was nearly $81 million.

## SHENTEL SAYS SATELLITE IMPACT IS FADING

Satellite, fixed wireless and the like are routine questions on earnings calls nowadays. For a company like **Shentel** that operates primarily in rural markets, it has a front-row seat to the growth of satellite broadband and its subsequent impact on an already intense competitive landscape. However, President/CEO *Ed McKay* noted that satellite broadband isn't much of a churn threat for Shentel at the moment, a change from the beginning of the year when **SpaceX**'s **Starlink** was making a push in certain rural areas. During Shentel's 3Q26 earnings call, McKay said the operator has seen "virtually no churn impact from satellite" in its low-fiber and incumbent broadband markets, and churn impact has fallen to less than 10 basis points after peaking in 1Q26. The bigger issues at play are inflation and softer demand. Incumbent broadband data churn rose to 1.76% in 3Q, while broadband data ARPU fell 3% to $79.84 and video RGUs dropped 13%, contributing to incumbent revenue—41.6% of Shentel's overall rev—slipping 6.8% to $2.8 million. McKay mentioned that churn rates improved in September, and Shentel is planning a new rate card and product offerings in early 2027 that move away from promotions and toward everyday pricing. The good news for Shentel is that Glo Fiber more than offset incumbent downturns. Glo had a record 8,600 net adds during the quarter, up 48% YOY, and added about 25,000 fiber passings to bring its total footprint to approximately 501,000 homes and businesses with an eye for 517,000 by the end of the year. Broadband data penetration reached 21.7%, with monthly churn averaging 1.1% over 12 months. Shentel's total revenue rose 4.6% to $93.9 million and adjusted EBITDA grew 11.8% to $33.2 million. Low fiber and commercial fiber revenue combined for a 19.5% YOY boost, representing 52% of Shentel's consolidated revenues in 3Q26. On AI, McKay said talks with hyperscalers about multiple data center opportunities are "progressing well" after the company signed a master service agreement with an unnamed entity, but had nothing new to share. Shentel raised net capex guidance to $255-275 million from $220-250 million, citing an expected 7,000 additional Glo Fiber passings by year-end and the timing of government grant receipts stretching into 2027. Shentel maintained its expectation of reaching positive free cash flow in 2027, with net leverage dipping below 5X by the end of 2027. A previously reported 10% reduction in workforce should save the company about $12.3 million annually.

## THE NEW COMCAST

Talk to your **Comcast** friends. If they weren't impacted by layoffs, chances are high someone on their team was. **LinkedIn** is awash with posts from Comcasters who have been informed their last day with the company is Dec. 31. The cuts

have hit several divisions so far, including HR and finance. There's been no firm number given on how many positions are expected to be cut, with CFO *Jason Armstrong* saying on last week's earnings call that the company expects to take a restructuring charge of more than $1 billion during 4Q26. Comcast didn't get back to us by deadline. Amongst all the LinkedIn layoff posts was news of a high-profile retirement. EVP *Lynn Charytan* announced she's retiring this week after 16 years at Comcast, 11 as General Counsel for Comcast Cable. "Next steps—more travel with my husband, more time with friends and family…and whatever other adventures await," she wrote, saying this was "the best job I ever had."

## SIEVERT WRAPS UP T-MOBILE ERA

*Mike Sievert*'s 14-year magenta-themed run at **T-Mobile** is coming to a close. According to an **SEC** filing this week, Sievert plans to step down from the board and his Vice Chair role at the end of this week. It doesn't sound like there's any drama with the move—the filing states Sievert's resignation "is not the result of any disagreement with the Company on any matter relating to its operations, policies or practices." Sievert first joined T-Mobile as EVP/CMO in November 2012, a couple of months after *John Legere* took over as CEO. Sievert would eventually succeed Legere in 2020 and hold the seat until last November, when T-Mobile tapped *Srini Gopalan* to take over the reins. No word on what Sievert's next move might be.

## SKYDANCE LEADERSHIP UPDATES

**Skydance** set its finance leadership team, as it moves quickly on delivering the $6 billion in synergies that the company promised post-merger. Among the roles announced by CFO *Dennis Cinelli* in a memo to staff Wednesday is *Kevin Creighton* as EVP, Corporate Finance & Treasury, leading an expanded org that will see WBD EVP, Treasury *Fraser Woodford* exit the company at the end of March. Creighton will also continue to oversee investor relations. *Patrick Cavanaugh*, who was EVP/CFO of Distribution at Paramount Skydance, will remain in the role at the combined company, overseeing distribution and the affiliates business. Warner Bros. Discovery's *Adam Cohn* is also staying put as EVP/CFO of **CNN**. PSKY's *Josh Walker* and *Liz Wright* will serve as EVP/CFO, Streaming and EVP/CFO, **Skydance TV**, respectively. Meanwhile, *Bryon Rubin* is transitioning from the CFO of TV Media role to COO of Skydance TV.

## VERSANT GROWS FAST PORTFOLIO

**Versant** is launching four new FAST channels across **Amazon**'s **Prime Video** and **The Roku Channel**. Rolling out on Prime Video this week are 24/7 linear channels streaming **Oxygen** true crime series "Snapped" and **E!** reality show "Botched," as well as new offerings Oxygen Murders of America and **CNBC** Ambition. The new Oxygen channel will feature 16 series from its library that highlight the true crime cases that shocked the nation. CNBC Ambition, on the other hand, will showcase inspiring stories of entrepreneurship, innovation, wealth creation and success from programs such as "Millennial Money" and "Billion Dollar Buyer." All of these channels will roll out in phases on The Roku Channel, starting on Nov. 3 with CNBC Ambition. Also joining Roku are FAST channels that Versant acquired through its **Free TV Networks** deal earlier this year. **Outlaw** arrives on Roku on Nov. 10, with **365BLK** following on Nov. 17.

## FOX NEWS' YOUTUBE MOVES

**Fox Noticias**, **Fox News Media**'s daily Spanish-language news program, is launching "Cafecito Chats," a weekly video podcast beginning Thursday. New episodes will be available every Thursday in video and audio formats across **YouTube**, **Fox One**, Spotify and all major podcast platforms. The show will feature in-depth interviews and conversations with prominent members of the Latin community, including athletes, public figures, influencers and music artists. The launch comes as Fox News Media surpassed 3.8 billion YouTube video views YTD. Citing data from **Emplifi**, the news brand said its channel is outperforming its closest news competitor, **MS Now**, by more than 840 million views on YouTube. It's beating **CNN** by 1.4 billion views. Fox Noticias has also seen a 153% viewership uptick on YouTube over the last six months. Fox Noticias is also launching daily short-form video and audio updates across all of its digital, social and podcast channels.

## FIBER FRENZY

**Comcast** completed buildout projects in three states this week: in the Indiana counties of DeKalb, Whitley and Huntington, the operator connected nearly 1,100 homes and businesses. Meanwhile, more than 4,300 addresses now have access to Comcast services in Franklin, New Hampshire, and 7,000 are coming online in Forest, Virginia.