

Looking over our shoulder: Who is the competition? Is it us?

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What everyone already knows...



Broadband is cable's strength

Bundling is a good thing

Competition is intense



User experience is important

OTT video is hot

What you may not know...

Broadband demand

Perception of value

OTT service availability

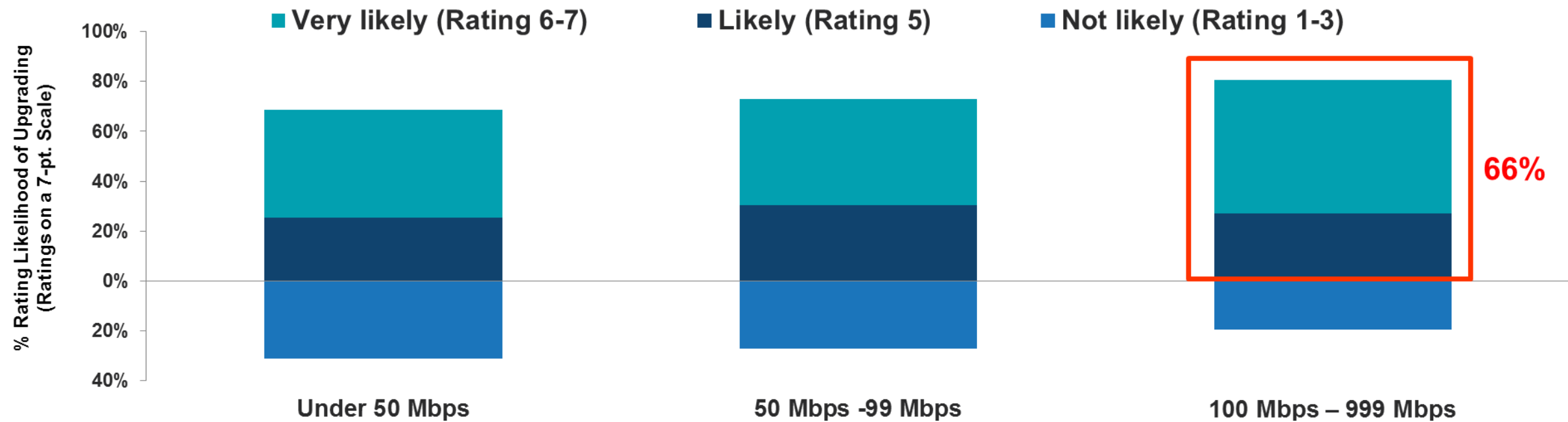
Consumer selection of video services

Partnering and aggregation



Demand for Broadband

Likelihood of Upgrading Broadband Service to 1+ Gbps by Download Speed (Q3/17)
Among U.S. BB HHs with Specified Broadband Download Speed

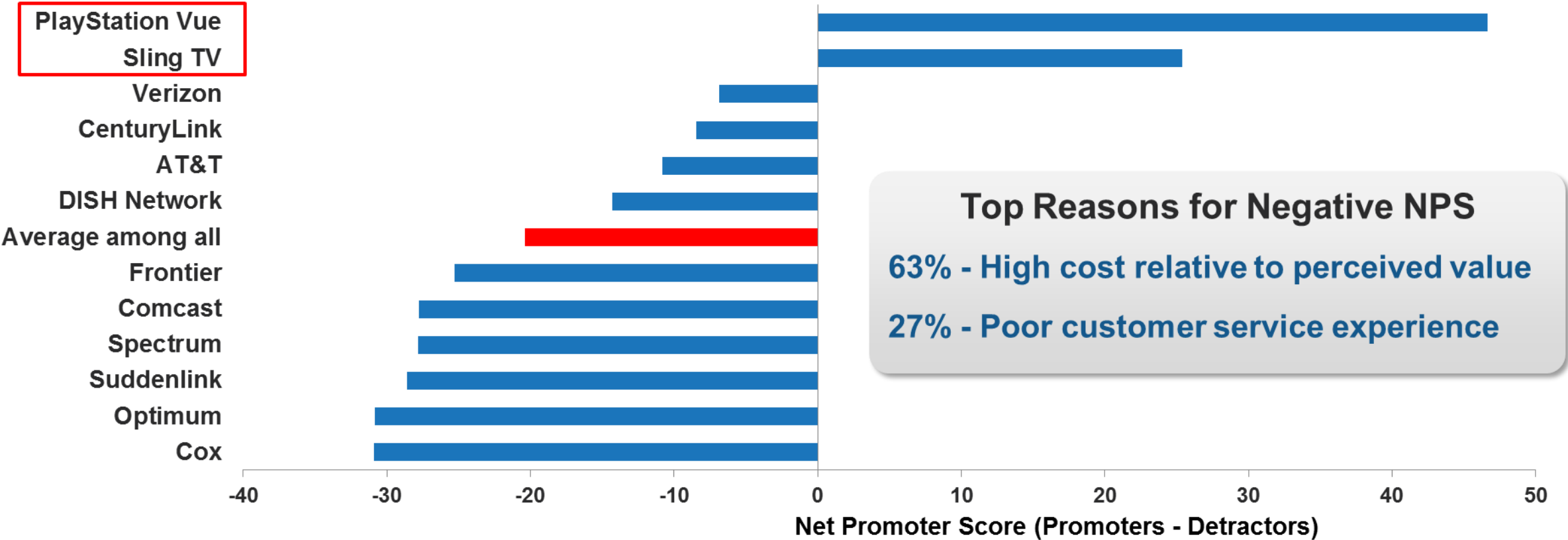


"AE1074. What is the download speed of your broadband service?" | "AE1085. How likely would you be to upgrade your broadband service to 1 Gbps or higher if it was available to you?" | Source: American Broadband Households and Their Technologies Q3 2017 | N=10,017, ±0.98% | © 2017 Parks Associates

Perception of Value

Net Promoter Score of Pay-TV Service Providers (Q3/17)

Among the 77% of U.S. BB HHs That Subscribe to Pay-TV Service from Specified Providers

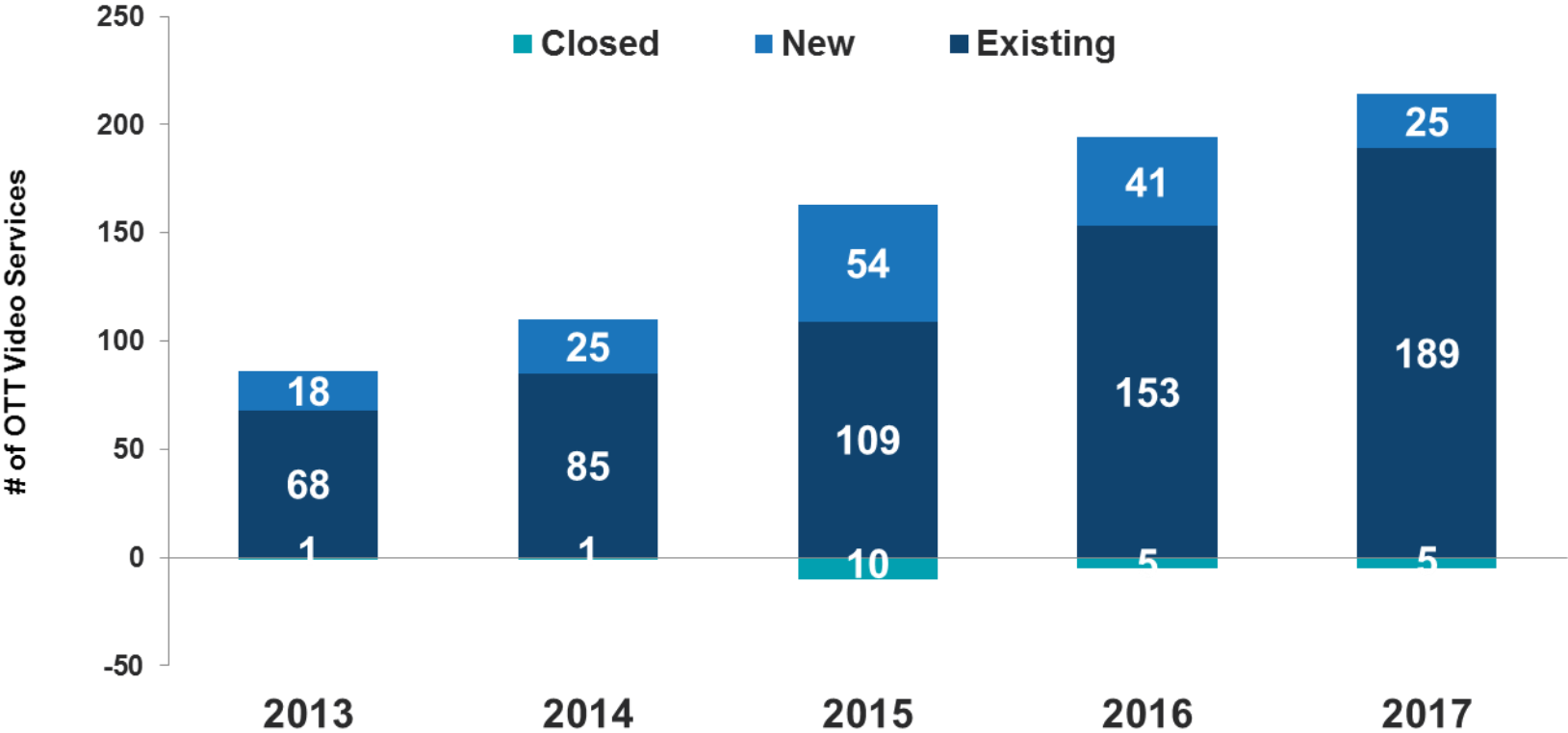


* Indicates small sample size, results provide directional information only
"AE1090. Over the past 12 months, which of the following changes have you made to your broadband service?"
Source: American Broadband Households and Their Technologies Q3 2017 | N=10,017, ±0.98% | © 2017 Parks Associates

OTT Service Availability

United States OTT Video Services, 2013-2017

Parks Associates OTT Video Market Tracker



Source: OTT Video Market Tracker 2014-2017 | © 2017 Parks Associates

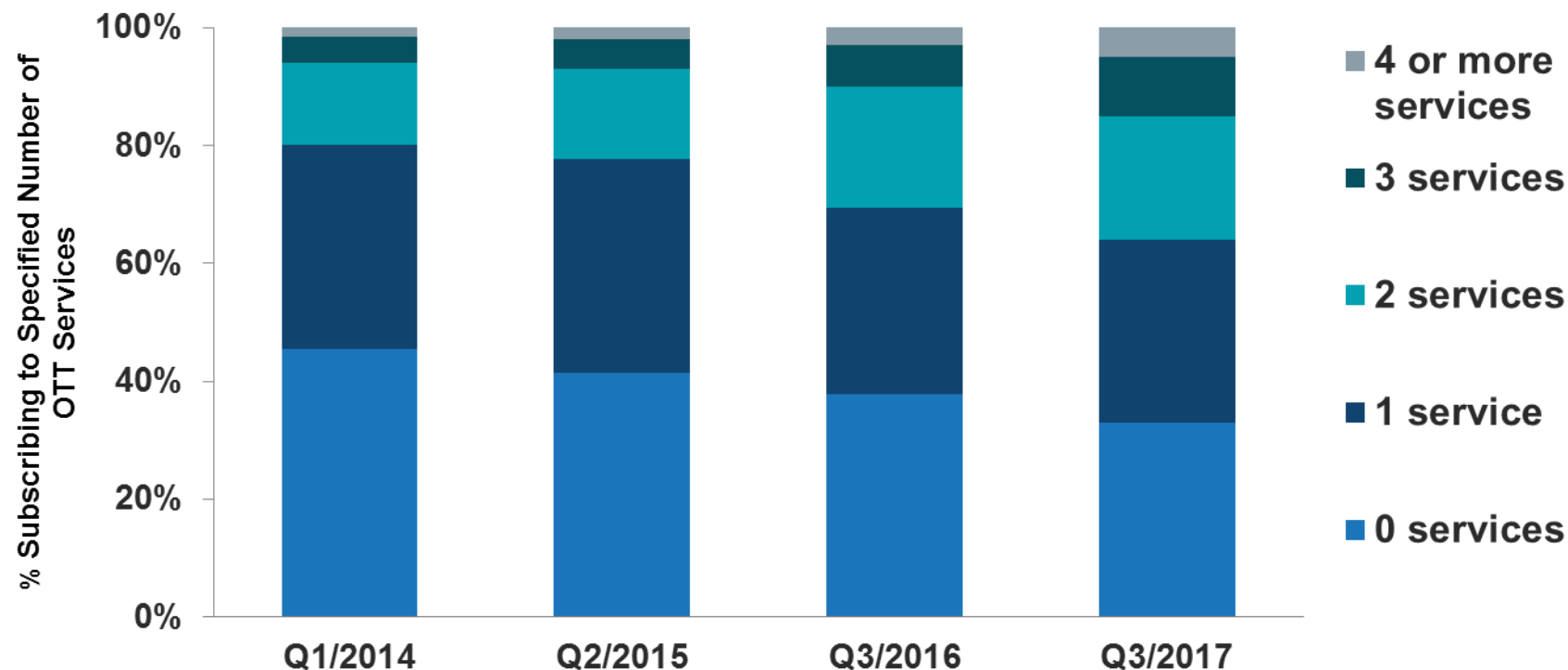
Number of OTT Video Services:

U.S.	209
Canada	124
Germany	96
U.K.	87
France	73

Consumer Selection of Video Services

Number of OTT Service Subscriptions (2014 - 2017)

Among U.S. BB HHs Surveyed



"DM6005/DM6006/DM6010. To which of the following video services does your household subscribe?"
Source: Multiple Surveys: American Broadband Households and Their Technologies | © 2016 Parks Associates

Half of OTT subscribing households subscribe to 2+ services

15% of broadband households subscribe to 3+ OTT video services

53% of broadband households subscribe to both pay TV and an OTT video service

30% subscribe to pay TV exclusively

12% subscribe to OTT video services exclusively

Partnering with OTT Video Services

Approaches for Operators

Promotion

Distribution

Broadband bundling

STB integration

Zero-rating



OTT Aggregation

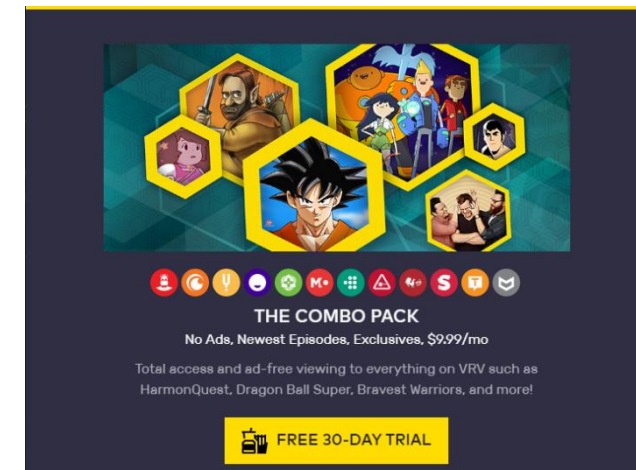
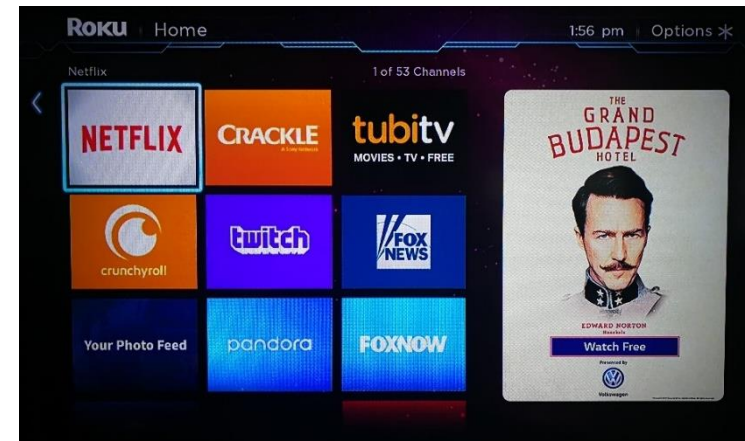
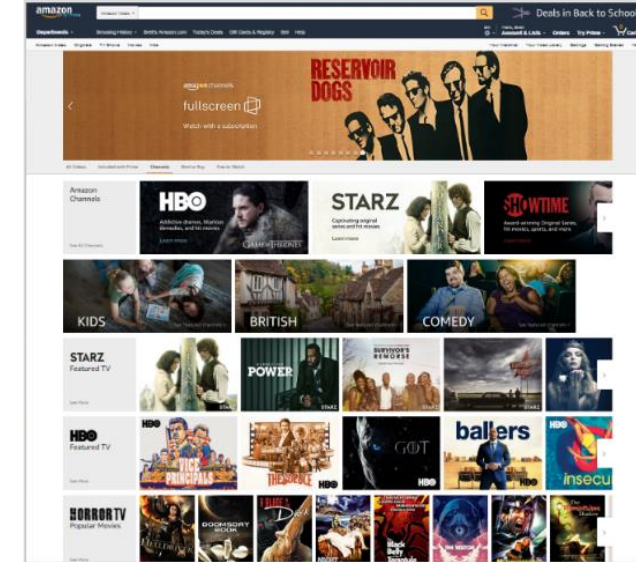
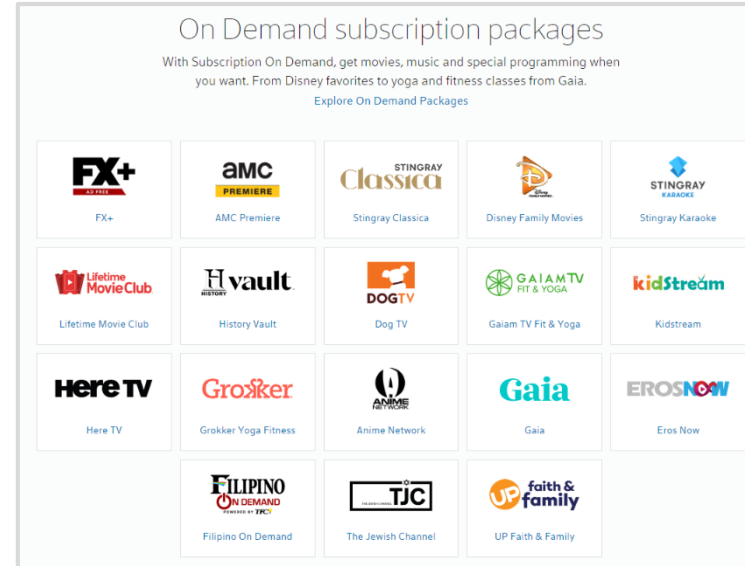
Traditional pay-TV providers

CE makers

Subscription OTT aggregators

Online pay-TV services

Ad-based OTT aggregators



The Future for Operators

Focus on perceived value

Prepare for the new partnerships and competitors

The new race for aggregation is on



Thank You



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