

Running the Numbers

"Datapoints" is researched and written exclusively for Broadband Library by industry analyst Stewart Schley



Cable's Business Connection

U.S. commercial Ethernet market share rankings as of June 30.

1. CenturyLink
2. AT&T
3. Verizon
4. Spectrum Enterprise (Charter Comms.)
5. Comcast
6. Windstream
7. Cox
- 8*. Altice USA, Cogent, Frontier, GTT, Sprint, Zayo

*8-plus (1-4% market share)

SOURCE: VERTICAL SYSTEMS GROUP

WHAT'S INTERESTING: Cable has drifted into a world once dominated by legacy telecom companies, as three U.S. cablecos have cracked the list of the nation's top Ethernet providers. Ranked by connected ports, the scorecard from Vertical Systems Group underscores that cable has become a major force in commercial/business Ethernet connectivity nationwide.

Video's Changing Profile

Behavior	Measurement base	% of respondents
Stream an SVOD service daily	All adults	30%
	Adults 18-34	52%
Share account credentials	Adults with Netflix	28%
	Adults with Hulu	22%
	Adults with Amazon Prime	10%
Get pay TV and an SVOD service	TV households	53%
Get only a pay TV service	TV households	25%
Get only an SVOD service	TV households	16%
Watch video on non-TV devices	All adults	46%

SOURCE: LEICHTMAN RESEARCH GROUP, AUG. 2018

WHAT'S INTERESTING: In case you hadn't noticed, people are flocking without reservation to new "over-the-top" video services. A category that was new, novel and untested only a few years ago now is a staple of the entertainment experience, with 30% of all adults now routinely streaming video from an SVOD service like Hulu, Netflix, Amazon Prime or any of the dozens of niche-targeted alternatives.

Striking Up the Broadband

U.S. subscribers in 000s as of June 30

Provider category	Subscribers (000s)	Share of total	Q2 2018 net adds
Top cablecos	62,885	64.8%	585,726
Top U.S. telcos	34,200	35.2%	-130,543
Total	97,085	100%	455,183

SOURCE: LEICHTMAN RESEARCH GROUP, Q2 2018

WHAT'S INTERESTING: The broadband storyline continues in cable's favor, as U.S. cablecos added more broadband customers in Q2 while rival telcos lost connections. Some of the telco losses reflect abandonment of aging DSL lines, but cable's also winning the broader battle even in fiber-rich environments as attractive pricing, new gigabit speeds and bundled arrangements present an argument telcos have trouble countering.



ARTWORK: SHUTTERSTOCK