

# Running the Numbers

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

## Bundles 'O Bundles



Video service combination	% of respondents citing
Pay TV, Prime Video (Amazon), Netflix	10.6%
Pay TV, Facebook, YouTube	7.5%
Pay TV, YouTube, Netflix	7.5%
Pay TV, YouTube TV, Netflix	6.3%
Pay TV, Facebook, Netflix	5.4%
YouTube, Facebook, Netflix	5.4%
Pay TV, Hulu, Netflix	4.9%
Pay TV, YouTube, Prime Video (Amazon)	4.4%
Pay TV, Netflix, Hulu with Live TV	3.8%
Prime Video (Amazon), YouTube, Facebook	3.7%

SOURCE: TIVO VIDEO TRENDS REPORT, JAN. 2019

**WHAT'S INTERESTING:** A novel way to look at the shifting North American video market comes from TiVo, which surveyed 4,458 adults to get a better idea of how streaming video providers are finding their way into people's lives. The most common video bundle involving streaming providers is the one-two-three punch of a pay-TV subscription, a Netflix account and the use of Amazon's increasingly popular Prime Video package, available to more than 60 million U.S. households that retain Prime memberships. One curiosity is the No. 4 blend, where YouTube TV — a "skinny bundle" substitute for traditional pay-TV service — is paired with...wait for it...traditional pay-TV service. That's probably because in certain homes there are actually two live/linear pay-TV bundles in place: The parents watch cable or satellite TV downstairs while the teen upstairs maintains his/her own YouTube TV account.

## Striking Up the Broadband

U.S. subscribers in 000s as of Sept. 30, 2018

Provider category	Subscribers (000s)	Share of total	Q3 2018 net adds
Top cablecos	63,614	65.1%	728,423
Top U.S. telcos	34,048	34.9%	-149,474
<b>Total</b>	<b>97,662</b>	<b>100%</b>	<b>578,949</b>

SOURCE: LEICHTMAN RESEARCH GROUP, Q2 2018



**WHAT'S INTERESTING:** Another quarter, another home run from the cable industry within the U.S. broadband Internet marketplace. Notice what's happening on the telco side: Major providers lost nearly 150,000 connections in the 2018 July-September period, evidence of the continuing fade of DSL. CenturyLink took the biggest lumps, shedding 76,000 subscribers as cable companies within CenturyLink's regions poached customers with the promise of affordable rates and superior performance. The upshot: Cable companies now account for roughly 65% of total U.S. broadband subscriptions.

## Holy Ethernet!

U.S. carriers ranked by Ethernet retail port share, June 2018

Rank	Carrier
1	CenturyLink
2	AT&T
3	Verizon
4	Spectrum Enterprise
5	Comcast
6	Windstream
7	Cox Communications
8+	Altice USA, Cogent, Frontier, GTT, Sprint, Zayo

SOURCE: VERTICAL SYSTEMS GROUP, Q2 2018

**WHAT'S INTERESTING:** Guess who's rising on the business networking circuit? Cable companies are. Cable providers occupy three of the top eight positions for U.S. Ethernet port connections, signifying rising presence among mid-size and larger businesses that depend on high-bandwidth solutions for connecting office locations, employees and customers. Vertical Systems ranks Charter Communication's Spectrum group as the largest cable Ethernet provider, with Comcast close behind.



## Screenplay

Top 5 video streaming devices ranked by popularity



Device	% citing
Smart TV	27.1%
Gaming console	19.4%
Roku receivers	17.7%
Amazon Fire Stick	15.7%
Apple TV	13.3%
Google Chromecast	12.5%

SOURCE: TIVO VIDEO TRENDS REPORT, JAN. 2019

**WHAT'S INTERESTING:** Smart TVs rule when it comes to connecting household TV sets to streaming video providers, as more than one-fourth of North American adults report having one. But arguably the more compelling players are the makers of separate receiving boxes for IP video. Roku, Amazon, Apple and Google are battling fiercely for supremacy here, on the thinking that a box in the home translates to a competitive advantage for steering users to the box makers' own video services, such as Roku's ad-supported Roku Channel.

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