

DATAPOINTS

Running the Numbers

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

Vintage Year for Cable Broadband


U.S. subscribers in 000s as of Dec. 31, 2018

Provider category	Subscribers (000s)	Share of total	2018 net adds
Top cablecos	64,345	65.5%	2,897
Top U.S. telcos	33,901	34.5%	-472
Total	98,247	100%	2,425

SOURCE: LEIGHTMAN RESEARCH GROUP, Q2 2018

WHAT'S INTERESTING: A striking delta between cable's gains (2.9 million) and the telco industry's losses (nearly 500,000) doesn't mean the industry can rest on its laurels. AT&T's ongoing fiber buildout coupled with the onset of the wireless 5G era will require deft maneuvering to keep cable in the broadband leadership position. Still, there's nothing wrong with popping a little champagne: The DOCSIS® revolution has been the crowning achievement of a transformed industry.





Where the Internet's Going

By the year 2022

4.8 billion	Global Internet users
28.5 billion	Networked devices and connections
82%	Video percentage of all IP traffic

SOURCE: CISCO VISUAL NETWORKING INDEX (VNI)

WHAT'S INTERESTING: By now it's an understood phenomenon — that video is taking over the Internet. But this well-chronicled transformation, from text and still images to a multimedia extravaganza, is now coupled with a second, far-reaching evolution toward connected devices. A recent comScore study showed the average U.S. home now maintains 10 IP-connected gadgets. But if these projections from Cisco are valid, we're just getting started.

Where Commercials are Seen

Digital ad view composition/growth by device, Q4 2018

	Share of total	YoY growth
Desktop	14%	-18%
Set-top box VOD	16%	-4%
Connected TV	42%	45%
Smartphone	20%	43%
Tablet	8%	14%

SOURCE: FREEWHEEL VIDEO MARKETPLACE REPORT, Q4 2018

WHAT'S INTERESTING: As more people pull video streams into the living room, advertising is following. The connected TV category — a broad range of technologies including the likes of smart TVs, Roku boxes and more — accounts for a fast-growing share of TV commercials that are piped over the Internet and land within "premium" video programming. This is the familiar world of network TV episodic series, sitcoms and more. The latest data from Comcast's Freewheel ad-enablement company show connected TVs now account for more than 40% of all commercial messages seen over the digital video environment, surpassing even cable's VOD services.

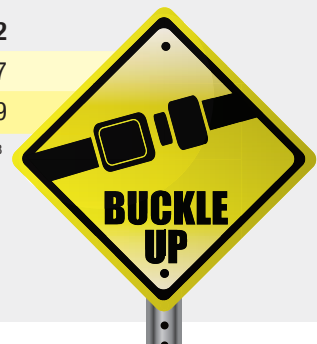
The March of DOCSIS 3.1

Global cable CPE unit shipments (in mil.) by DOCSIS technology

	2016	2017	2018	2019	2020	2021	2022
DOCSIS 3.0	40.5	29.7	17.0	13.3	12.4	12.4	13.7
DOCSIS 3.1	0.0	11.6	21.7	29.5	32.0	33.5	33.9

SOURCE: CABLELABS, FROM IHS MARKIT ESTIMATES, 2018

WHAT'S INTERESTING: 2018 looks to have been a changing-of-the-guard, as devices that speak the language of DOCSIS 3.1 overtook predecessor variations in terms of total worldwide shipments. IHS Markit data relayed by CableLabs shows the appeal of DOCSIS 3.1, with downstream speeds of up to 10 Gbps, is taking hold in a big way. Fasten your seat belts.



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