Running the Numbers

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

DOCSIS Delivers
U.S. high-speed Internet subs in 000s as of June 30, 2019

Provider category	Subs (000s)	Share of total	Q2 net adds
Top cablecos	66,234	66.3%	532
Top telcos	33,718	33.7%	-162
Total U.S.	**99,952**	100%	370

SOURCE: LEICHTMAN RESEARCH GROUP, Q2 2019

WHAT'S INTERESTING: It's the gift that keeps on giving. More than 20 years after the first version was published, Data-Over-Cable Service Interface Specifications technology continues to propel an enormous market-share lead for the U.S. cable industry in the sector of fixed-network high-speed Internet connections. Data compiled by Leichtman Research Group for the first half of 2019 show the cable industry has corralled two out of every three connections, with the lead widening as aging DSL hookups are displaced.

Breakthroughs in Customer Care
Selected metrics tied to Comcast's Xfinity Assistant initiative

Customer interactions (per month)	1 billion
Outgoing messages sent (per month)	20-25 million
Containment rate	48%
Transactional NPS improvement	20-30 points

SOURCE: COMCAST, FROM CABLE-TEC EXPO 2019 PRESENTATIONS

WHAT'S INTERESTING: A multi-year effort to rethink customer care is paying off at Comcast, as artificial intelligence and proactive messaging combine to make subscribers happier – and truck rolls less common. Comcast Chief Customer Experience Officer Charlie Herrin, who delivered a provocative presentation at Cable-Tec Expo, pointed to improvements in Net Promoter Scores and in "containment" levels (problems being solved in real-time within a single contact framework), as evidence the new initiative is working.

Game On!
% of U.S. population segment paying for a subscription service in 2018

Segment	Gaming	Music	Streaming video
Overall	30%	41%	69%
Gen Z	52%	58%	80%
Millennials	53%	60%	88%
Gen X	33%	47%	77%

SOURCE: DELOITTE DIGITAL MEDIA TRENDS REPORT, 2018

WHAT'S INTERESTING: We heard lots of talk at Cable-Tec Expo about work that's afoot to reduce latency – the delay time between pressing a button and provoking a network response – as cable companies look to support burgeoning demand for twitch-sensitive video gaming. Here, Deloitte tells us more than 50% of Gen Z and Millennials already pay for video gaming subscriptions. With Google's Stadia storming the market, and Project xCloud on the way from Microsoft, the market's only going to grow from here.

Internet Goes Mobile
Global IP traffic by device type, 2017-2022 (% of total Internet traffic)

Device type	2017	2022
PCs	49%	19%
Smartphones	23%	50%
TVs	17%	16%
M2M	4%	7%
Tablets	7%	7%

SOURCE: CISCO VISUAL NETWORKING INDEX

WHAT'S INTERESTING: Note the huge increase in Internet traffic tied to smartphones over the next few years. Cisco sees the combination of more users plus more bandwidth-hungry applications (think video) converging to increase smartphone traffic through 2022. On the flipside, PCs that helped kick-start the high-speed Internet revolution in the late 1990s are fading fast from the scene.

Stream Scene
% of cableco subscribers with streaming video accounts

Streaming service	Comcast	Charter	Cox	Verizon
Netflix	69%	60%	65%	70%
Amazon Prime Video	54%	43%	48%	61%
Hulu	23%	20%	25%	26%

WHAT'S INTERESTING: This comparison by investment researcher MoffettNathanson illuminates differences in the adoption/use of popular streaming video applications depending on what cable company's involved. Some interesting takes: The high (61%) penetration of Amazon's Prime Video service in homes with Verizon's FiOS may reflect Verizon's late-2018 move to offer a free year of Prime membership for subscribers with gigabit Internet. Similarly, Comcast's move to integrate both Netflix and Amazon into Comcast's X1 video service may have an impact on relatively lofty penetrations (69% and 54%, respectively) of those services.

SOURCE: MOFFETTNATHANSON OCT. 2019