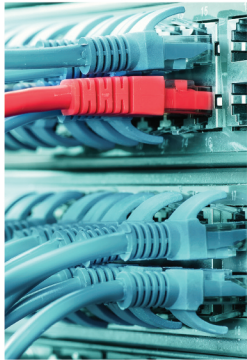


# Running the Numbers

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



## Metro E Leaders

U.S. carriers ranked by no. of business Ethernet ports

1 CenturyLink	5 Comcast
2 AT&T	6 Windstream
3 Verizon	7 Cox Communications
4 Spectrum Enterprise	8 Others listed alphabetically: Altice USA, Cogent, Frontier, GTT, Sprint, Zayo

**WHAT'S INTERESTING:** Three of the top seven providers of metro Ethernet connections to U.S. businesses are cable companies, and Altice USA isn't far behind. The latest (mid-2019) rankings underscore the pitched competition that's under way to connect more businesses at every level — small, mid-tier and enterprise — to super-fast Ethernet pipes.

SOURCE: VERTICAL SYSTEMS INC. JUNE 2019 LEADERBOARD

## Consumer Media Spending by Format



(\$ in mil.)	2018	2019	YoY % chg.
Streaming/SVOD	\$12,848.9	\$15,897.7	23.7%
Packaged goods sales	\$4,029.9	\$3,292.6	-18.3%
Electronic sell-through	\$2,457.6	\$2,583.4	5.1%
VOD	\$2,086.9	\$1,957.9	-6.2%
Kiosk	\$1,098.0	\$884.6	-19.4%
Physical subscription	\$369.3	\$301.2	-18.4%
Brick and mortar rentals	\$316.9	\$250.1	-21.1%
<b>Grand total</b>	<b>\$23,207.5</b>	<b>\$25,167.5</b>	<b>8.4%</b>

**WHAT'S INTERESTING:** Big changes are occurring in the way consumers prefer their media content to get to them. The big shift is toward Netflix-style subscription plans (\$15.8 billion in revenue for 2019) and away from transactional sessions, as indicated by the 6.2% drop in video-on-demand revenues. As for brick-and-mortar video rental stores, there's not much left: The Blockbuster Video era is a thing of the past.

SOURCE: DIGITAL ENTERTAINMENT GROUP



## Who's Building?

Dycom Industries share of revenues for 9 mos. ended...

Company	Oct. 2018	Oct. 2019
Verizon Communications	18.6%	21.8%
CenturyLink	13.3%	15.9%
AT&T	21.3%	21.3%
Comcast	21.3%	15.4%
Windstream Holdings	3.5%	4.3%
Charter Communications	3.8%	2.8%

**WHAT'S INTERESTING:** Dycom, the large Florida-based provider of telecommunications construction project management, provides an interesting barometer on network buildout activity in the U.S., given that it does business with almost all the main players. Here, we can see the share of Dycom's contract revenues (\$2.6 billion through the first nine months of 2019) ranked by client spending. Two of the top six contributors are cable companies (Comcast and Charter.)

SOURCE: DYCOM INDUSTRIES INC.

## Speed to Market

(U.S. high-speed Internet subscribers as of Sept. 30, 2019)

Provider category	Subscribers (000s)	Share of total	Q3 net adds
Top cablecos	67,061	66.7%	831,917
Top telcos	33,491	33.3%	-226,257
<b>Total</b>	<b>100,552</b>	<b>100.0%</b>	<b>605,660</b>

**WHAT'S INTERESTING:** Momentum for the cable industry continues to build as cablecos fly past telco competitors on the high-speed Internet circuit. For the July-Sept. period last year, cable companies racked up more than 830,000 net subscriber additions, while telcos including Verizon and AT&T shed net accounts. Overall, nearly 85% of U.S. homes are now connected to high-speed broadband data networks.

SOURCE: LEIGHTMAN RESEARCH GROUP

## Smart TVs Take the Spotlight

Streaming device type	% of respondents using	Year-over year chg.
Smart TVs	30.7%	3.5%
Roku streaming sticks/players	20.7%	9.8%
Amazon Fire TV	18.9%	3.1%
Gaming consoles	18.8%	-0.6%
Google Chromecast	9.9%	-2.6%
Apple TV	8.5%	-4.9%

**WHAT'S INTERESTING:** If you've purchased a TV set lately (congrats!), you've been invited to fire up a built-in application for bringing online video apps like Netflix or Amazon Prime Video to the screen. And you're not alone. So-called "smart TVs" are now used more than any other type of device to deliver OTT video, surpassing the prevalence of Roku, Amazon and other branded devices, per TiVo's always-interesting *Video Trends Report*.

SOURCE: TIVO INC. VIDEO TRENDS REPORT (BASED ON Q4 2019 SURVEY OF 6,145 ADULTS IN N. AMERICA)