

ONE REMOTE: HOW EVERYONE BENEFITS FROM PAY TV SVOD AGGREGATION



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Author: Colin Dixon, Founder and Chief Analyst, nScreenMedia | Q4 2018



EXECUTIVE SUMMARY

Television viewers are juggling pay TV and online video services. For example, more than half of households in the US and Denmark have traditional pay TV and multiple subscription-video-on-demand (SVOD) services.

SVOD usage in many homes is approaching traditional television consumption levels. The time spent with SVOD would previously have been spent with pay TV.

The move to SVOD viewing is both a threat and an opportunity for pay TV operators:

- The threat: people spending time away from pay TV will value it less and may cut the cord.
- The opportunity: consumers are struggling with complexity and want help finding something to watch across all their services.

Pay TV operators are uniquely qualified for the role of SVOD aggregator. However, they must justify why SVOD providers and consumers should work with them.

To be a successful aggregator of SVOD services, pay TV operators need to do two things:

1. Understand the value they bring to SVOD providers and their customers.
2. Use an aggregation platform that delivers that value while fulfilling operator needs.

For subscribers to prefer the SVOD services on the operator platform over standalone apps the experience must:

- Make finding something to watch significantly easier.
- Make watching it on TV simple.
- Support all the subscriber's SVOD services.

For SVOD providers to want to work with a pay TV operator, the operator must:

- Help consumers find the service.
- Help keep them subscribed to the service.

Unifying pay TV and SVOD services behind the pay TV operator set-top box (STB) remote can deliver new value to pay TV operators:

- Pay-per-view revenue should increase as customers do more searches using the operator STB TV remote.
- Keeping subscribers on the STB longer should result in higher net promoter scores.

Operators face challenges in being a successful SVOD aggregator:

- Adopting a marketing mindset by using techniques such as contextual prompting to market SVOD services to customers based on their current activity.
- Keeping the app store fresh with the latest services and app versions.

An operator must add an application platform to the STB that supports their needs and the needs of SVOD providers and customers. The app platform hosts the SVOD app on the operator STB and integrates it with operator services. The app platform must also define an efficient onboarding process to integrate the SVOD service into the operator experience.

SVOD providers will prefer a full-featured, standards-based, app platform. It must support the gathering of detailed user data, protect that data, and allow the app to connect to operator support services.

The app platform must support the needs of customers by providing full integration of SVOD services into the pay TV experience, supporting all the SVOD services required, and ensuring all apps keep pace with the latest service features.

The onboarding process must make it easy to integrate an SVOD service into the STB and backend services, must make it easy to update and remove SVOD services, and support multiple regional app lists.

INTRODUCTION

This is a transitional moment in the history of television. Consumers still have one foot planted firmly in the world of linear television, but the other is dipping its toes into the waters of online TV. In the US and some European countries, three-quarters of households still subscribe to traditional pay TV, and over half of homes have both pay TV and at least one SVOD service.^{1,2} People are also beginning to find more services online they like. The average SVOD home in the UK and Germany has two services, while in the US the average home has 2.8 services.³ In addition, online originals now regularly attract audiences as large as traditional TV shows. For example, *Stranger Things 2* attracted 15.8 million viewers in the first three days of its release on Netflix. The *Walking Dead* season 8 premiere on regular television in the US attracted 15 million viewers in the same period.⁴

Viewers who have multiple video services are more likely to say their TV entertainment needs are met.⁵ In a recent survey, 40% of those with one TV subscription agreed their needs were being met, while 62% of those with four or more agreed. However, more choice brings increased complexity. Only 22% said multiple services made it easy to choose what’s best for them to watch. The survey group was asked if they would rather access all their TV content from a single source. Of the half that expressed a clear preference, 69% preferred a single source while 31% preferred accessing sources individually.ⁱ

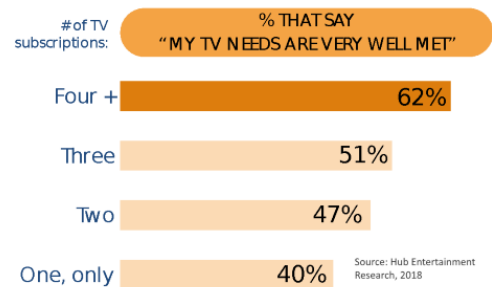
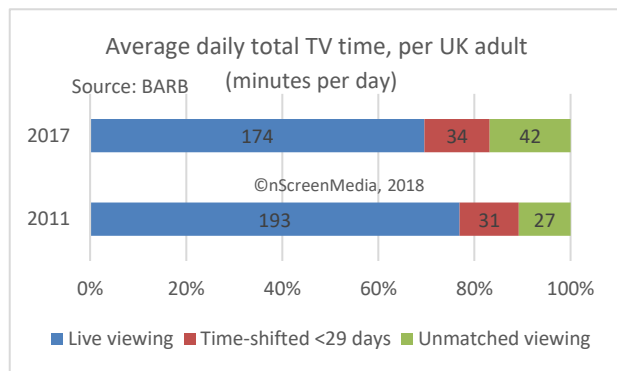


Figure 1. More video subscriptions increase TV satisfaction

However, most viewers who want a single-aggregator don’t want the big bundle back. More than 2 in 5 want to choose and pay for only the networks they like. Just 10% want large pre-set bundles.



What this data tells us is that online TV represents both a risk and an opportunity for pay TV providers. The risk is that SVOD viewing is not additive to pay TV viewing, it is replacing it. Broadcasters’ Audience Research Board (BARB) in the UK found that the total time spent watching television hardly changed between 2014 and 2017.⁶ However, over that period live viewing declined 10% while SVOD and other “unmatched viewing” increased 56%.ⁱⁱ The less time a pay TV subscriber spends with their service, the lower the value they will ascribe to it.

The fact that consumers are struggling with the complexity of managing all their services is an opportunity for pay TV providers. Though they don’t want to rely on the big pay TV bundle, they do want someone to integrate all their services into one experience, behind one TV remote. The pay TV operator is perfectly positioned to fulfill that role.

About This White Paper

We look at how pay TV operators can embrace the role of SVOD aggregator for their customers. Key to that role is the app platform and onboarding process that brings the SVOD services into the pay TV experience. We examine what an app platform is, what it must do, the onboarding process it defines, and the opportunities and challenges SVOD aggregators face.

ⁱ 48% expressed a clear preference for either a single aggregator of content or individual services. 52% had no opinion or only a slight preference either way.

ⁱⁱ Unmatched viewing includes SVOD, gaming, smart TV apps and other activity outside of live and time-shifted viewing.

PAY TV'S VALUE TO SUBSCRIBERS AND SVOD PROVIDERS



Manuel Cubero
CCO
Kabel
Deutschland

“Twenty years ago, we were an aggregator of channels, and increasingly we are becoming an aggregator of SVOD. With GigaTV, we try to offer an integrated product. We have the public and private broadcasters, the pay channels and SVOD.”

Pay TV operators are uniquely qualified for the role of SVOD aggregator. After all, they have been aggregating linear channels into a manageable experience for their customers for decades.

In many respects, SVOD services are the “channels” of the digital age, so it makes perfect sense for pay TV operators to step up to the aggregation role. Many are ready to accept that role. Manuel Cubero, Chief Commercial Officer at Kabel Deutschland said:⁷

“We see ourselves as aggregators of SVOD services as well as TV channels. Twenty years ago, we were an aggregator of channels, and increasingly we are becoming an aggregator of SVOD. With GigaTV, we try to offer an

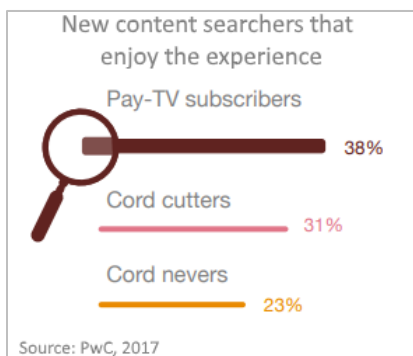
integrated product. We have the public and private broadcasters, the pay channels and SVOD.”ⁱ

The process of aggregating SVOD services is very different, and more complex, than adding a new linear channel. The core function of SVOD aggregation is to facilitate the connection between subscribers and their SVOD services. However, since they can meet directly online, operators must do more to justify their value.

Understanding what subscribers and SVOD providers need from the pay TV app platform is essential if operators are to establish their position in the value chain of SVOD delivery. Here are some of the things both will be looking for from the operators.

What Subscribers Need

In the early days of television, consumers grew tired of fiddling with an antenna and poor picture quality. Cable solved these problems for them. Today, consumers are dealing with a new set of complexities. The operator must improve or eliminate these problems if it is to keep its customers happy.



Chief among the challenges faced by consumers is finding something interesting to watch. Pay TV operators can address this problem better than anyone else. In a recent PwC survey, 38% of pay TV subscribers who looked for new video said they enjoyed searching for new things to watch. Fewer non-pay TV customers said the same, as did 31% of cord-cutters and 23% of cord-nevers. Moreover, three-quarters of cord-nevers said they often struggle to find something to watch, despite there being a lot of choices available.

Watching SVOD services on TV is surprisingly complex for consumers. There is a dizzying array of options and devices available from which to choose, but it is very difficult to decide the best one to buy. For example, sometimes the most popular services aren't supported on mainstream devices. A UK streamer with a Now TV box can watch many popular broadcaster apps but can't watch Amazon Prime Video, the second most popular UK SVOD service.¹ Though virtually everyone watches video on YouTube, an Amazon Fire TV user can't use the device to watch YouTube on television.

ⁱ Kabel Deutschland owns Vodafone, and GigaTV is Vodafone's set-top box/gateway.

Smart TVs are not a good answer, either. Though a new TV has the latest apps and services, as it ages updates come less frequently. A two-year-old TV may be missing many of the latest services and features. Since TV manufacturers want consumers to buy a new TV, there is no incentive for them to keep the apps current on older sets. To keep current, consumers must look for other devices to meet their TV streaming needs. Once again, the complexity of viewing SVOD on TV increases.

By aggregating SVOD services, the pay TV operator can take all the complexity out of streaming to the TV.

There are other advantages for the consumer if they can rely on their pay TV operator to deliver their SVOD services. They include:

- One TV remote operates all TV services.
- A unified bill makes spending and service management easier.
- There is no need to change TV input.

What SVOD Providers Need



*Les Moonves
CEO, CBS*

“Amazon has been absolutely amazing in terms of growing our subs. They’ve been at the top of the list. We really like what they’re doing. We get more from them than from any of our other partners.”

At this stage in the market for premium online video services, SVOD providers have one overriding goal: to increase subscribers. Whether a provider is as big as Netflix or as small as The Film Detective, the right aggregator can help them get exposed to new customers.

For example, CBS in the US allows Amazon Prime Video customers to sign up for CBS All Access and Showtime through Amazon’s Channels program. Les Moonves, CBS’s CEO, says the two services are on track to reach 8 million subscribers by 2019, a year ahead of schedule. He gives much of the credit for the success to Amazon:

“Amazon has been absolutely amazing in terms of growing our subs. They’ve been at the top of the list. We really like what they’re doing. We get more from them than from any of our other partners.”⁸

SVOD providers will look to pay TV operators to offer a similar lift in subscriber acquisition.

The value of pay TV to deliver longer-term customer relationships will also be of interest to SVOD providers. Churn among smaller SVOD providers is estimated to be 50% or more per year in the US market.⁹ Pay TV churn is typically 20%, and lower than that for customers who subscribe to two or more services.ⁱⁱ Though churn is not as important to SVOD providers as pay TV operatorsⁱⁱⁱ, customer lifetime value (CLV) is very important. The longer a subscriber stays with a service, the higher the customer lifetime value. Churn and CLV are closely related: if you lower churn you increase CLV.

ⁱ Now TV has announced no plan to add Amazon Prime Video.

ⁱⁱ Dish Network reports average monthly churn in the range 1.5% to 1.8%, which is approximately 20% on an annualized basis.

ⁱⁱⁱ The costs associated with customer acquisition are much lower for SVOD than for pay TV.

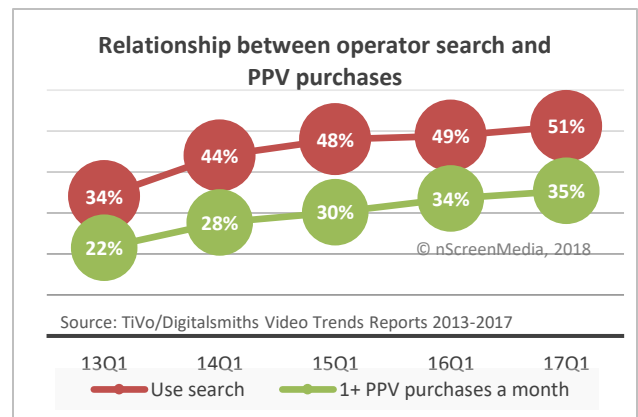
OPERATOR OPPORTUNITIES

Aggregating SVOD services behind the operator’s set-top box (STB) remote should keep pay TV subscribers using the operator television environment rather than a third-party device or service. This, in turn, should help reduce churn, as subscribers will see more value in their pay TV service. However, there are several distinct areas where SVOD aggregation can help operators protect existing revenues and uncover new value.

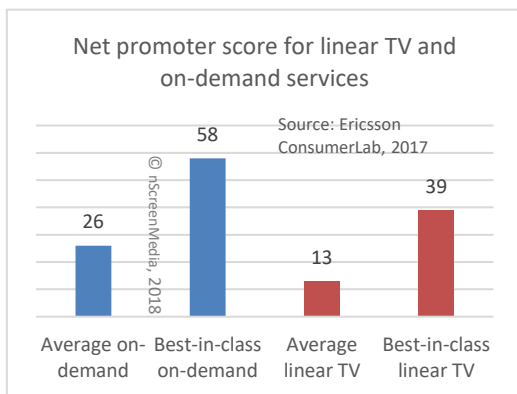
Adding Incremental Pay-Per-View Revenue

Pay-per-view (PPV) is one revenue stream that is at great risk from customers spending time on other devices. If a consumer is watching Netflix on an Apple TV, it is only natural to use Siri to find a newly released movie. If the customer does this, the video rental or purchase will occur in iTunes. If the consumer is watching Netflix on the operator STB, the sale is captured by the pay TV provider.

There is a strong link between the use of search and the number of PPV purchases a consumer makes. Between 2013 and 2017, the number of pay TV customers in the US who use search functionality increased from 34% to 51%. Over the same period, the number of subscribers making 1 or more PPV purchases per month increased from 22% to 35%.¹⁰ In other words, as operators integrate more SVOD services and customers use search more to hunt for something to watch across them, PPV purchases are consequently likely to increase.



Improved Net Promoter Score



Pay TV has struggled to maintain a strong net promoter score (NPS).ⁱ In 2017, Ericsson ConsumerLab asked consumers in 13 countries if they would recommend their on-demand and linear TV services to a friend.¹¹ From this, the company derived the NPS for each service. The best-in-class linear TV service scored 39 while the best-in-class on-demand service scored 58. The average linear TV service scored 13 while the average on-demand service scored 26.

Consumers in the Ericsson survey rated on-demand services better than linear TV services in 10 different categories of performance—from content discovery to picture quality.

If it is the pay TV operator that brings SVOD services to the consumer, performance and experience of the two services become conflated. Under these circumstances, the perception that one is much better than the other is difficult to sustain. Further, the fact that the pay TV operator is solving many of the complexities of watching online video on television should have a big positive impact on the operator’s NPS.

ⁱ NPS is the difference between the percentage of people that would recommend a service and those that would not. High positive values are good, lower or negative values are bad.

Incremental Platform Revenues

Aggregating and promoting SVOD services to a large pool of subscribers can help drive sign-ups significantly. Amazon's ability to market on behalf of its SVOD partners has already been discussed. Operators have a similarly captive audience. Moreover, the audience is very focused on watching new shows and movies. More than half of US consumers look for a new TV show or movie at least once per week, and 83% look a few times per month.¹² These search events are perfect contextual marketing opportunities for SVOD services and bring tremendous value to an SVOD partner. Operators frequently receive compensation from a partner for providing this value. For example, it might receive a new-subscriber finder's fee. In addition, many SVOD services will welcome other assistance with such operational tasks as:

- Content hosting and streaming services
- Promotion and marketing
- Ad sales and targeted ad insertion
- Billing management
- Customer management

The operator can potentially charge the SVOD provider for these additional services.

OPERATOR CHALLENGES

Adopting a Marketing Mindset



Andre Silva
CTO
CuriosityStream

“Context-aware search and being able to filter for specific content when the operator is aggregating across thousands of titles would be of vital importance. As they aggregate more and more titles, search features will become one of the best ways for customers to find what to watch.”

Easy access to subscribed SVOD services is also important. However, it is also important to make unsubscribed services easy to find. For example, when a customer searches for a movie, the results returned should not only include subscribed services. Other services providing that content should be offered, as well.

Amazon uses this “contextual prompting” approach extensively. For example, users searching for the HBO show *Silicon Valley* see options to buy episodes and show seasons in the Amazon store. They are also prompted to subscribe to HBO Now where all episodes are available.

SVOD providers would like to see the Amazon approach from pay TV partners. CuriosityStream’s CTO, Andre Silva, has plenty of experience working with aggregators. The

service appears on Comcast X1 STBs as well as in Amazon Channels. He sees leveraging context as a key value:

“Context-aware search and being able to filter for specific content when the operator is aggregating across thousands of titles would be of vital importance. As they aggregate more and more titles, search features will become one of the best ways for customers to find what to watch.”

To cement its value to SVOD providers, an operator must think like a store owner. It must market contextually appropriate services and content to a customer whenever it can.

Whether or not the pay TV operator receives revenue from an SVOD provider directly, there is implicit value in a subscriber using more SVOD services inside the operator experience. In this case, more is certainly better.

App Store Management



An app store is where the subscriber finds the SVOD services in the pay TV experience. As with any store, ensuring the merchandise is as fresh as possible is critical to keeping customers coming back. The latest versions of the apps—with the latest features—and the newest services must be available and easy to find. Outdated apps must be removed.

The operator can lean on customer usage data to help optimize store performance. For example, if viewers search for a new app that is unavailable in the store, the operator can reach out to the provider to help bring the service to its customers. The operator can notify all subscribers as soon as the service is available, and target the interested viewers with a special offer or promotion to encourage them to start using it.

In some cases, keeping up to date may mean upgrading the store itself. For example, artificial intelligence is beginning to help content providers improve the quality of metadata. In turn, better metadata results in better recommendations. Allowing the apps to take advantage of new advanced store functionality enables them to deliver the best experience they can.

BRINGING SVOD INTO THE PAY TV EXPERIENCE

There are many ways an operator can approach aggregating SVOD services on its platforms. For example, the first operator to integrate Netflix onto its STBs was Waoo!. The Danish operator recognized in 2013 that many of its customers were using Netflix. It made the radical decision to help customers access the SVOD giant's service from inside the pay TV experience.¹³

However, at that early stage, the infrastructure to integrate SVOD apps into the pay TV service did not exist. Waoo! turned to AirTies, its STB maker, and Nordija, the STB software maker to help it build a custom integration for Netflix.

The solution they came up with was to add a Netflix button into the pay TV guide interface. When a customer selects the button, the STB unloads the operator guide app and swaps in the Netflix app. One of the reasons for this unusual and cumbersome arrangement was to accommodate Netflix' demand for strict content and user data protection.

The approach satisfied the basic goal of keeping the customer on the operator STB. Unfortunately, the limited integration with the operator guide and lack of scalability to add other services makes it a bad model for SVOD aggregation. There are over 200 SVOD services in the US and more than 100 in Europe. Clearly the Waoo! approach does not scale to accommodate that many services.



Figure 2. Waoo!'s Netflix integration works but is cumbersome and doesn't scale

APPLICATION PLATFORM:

A software architecture that allows multiple apps to run on a pay TV operator STB.

ONBOARDING:

The process of integrating an SVOD service with the pay TV experience.

Operators need an application platform and SVOD onboarding processes that support adding many services. The app platform must allow an operator to easily add, update, and replace SVOD apps. It must also allow subscribers to search and discover content easily across them all. Supporting all the content and data security needs of the SVOD providers is also critical.

The operator's app platform must support the needs of three main constituencies:

- The pay TV operator
- SVOD providers
- Pay TV subscribers

Only if the app platform satisfies each of these groups will it help the operator successfully fulfill the role of SVOD aggregator.

WHAT AN APP PLATFORM MUST DO

The SVOD app platform an operator selects must support the needs of the three constituencies involved in the process: pay TV operators, SVOD providers, and pay TV subscribers.

Features That Serve Pay TV Operators

The primary features an operator should look for in an app platform include:

- Easily integrates into the STB and backend OSS/BSS systems.¹
- Provides full app lifecycle management.
- Provides app and service usage data.
- Supports regional app lists.

Since many pay TV operators have multiple STBs deployed, it is crucial that the app platform work with all of them. Smooth integration with existing billing and customer management systems is also essential.

SVOD services frequently update their apps to add new features and functionality. Pay TV providers must ensure their subscribers have these new features. If the pay TV app trails far behind the standalone app, customers may be tempted to move to a Roku or Apple TV. Consequently, full app lifecycle management is required, making it simple and fast to add, suspend, remove, and refresh apps that appear in the app store.

Less obvious is the need for robust data gathering. Agreements with SVOD providers may prohibit pay TV operators from gathering usage data while the provider's app is in use. However, knowing which apps consumers use and which they do not can help with app marketing campaigns and with prioritizing the more popular services in the interface.

Usage data can also help build a more accurate picture of subscribers' interests. For example, viewers who use the FilmStruck and Film Detective services may be good targets for PPV rentals of classic movies in the on-demand catalog. Gathering data on cross-app searches can also be helpful. A customer who frequently searches for action movies could be a great target for a promotion offering all the *Die-Hard* movies.

Many pay TV operators provide services across multiple regions. To support this, the app platform should allow an app to be uploaded once and deployed to all regional systems in which it is needed. Further, operators need to be able to deploy and maintain a different mix of apps for each region. That way, an operator with services in France and Germany can use the same infrastructure in both regions. The French and German services simply pick the SVOD services that should be included.

The app platform must provide the operator with full app lifecycle management, making it simple and fast to add, suspend, remove, and refresh apps that appear in the app store and that are being used by customers on the operator set-top box.

¹ OSS—operational support system, BSS—business support system.

Features That Serve SVOD Providers



*Adeline Cassin
CMO
CuriosityStream*

“Data and analytics are also important here. Ideally, the aggregator will provide us with audience insights, which better serve us in how we recommend to the aggregator to market our service and content, making this a win-win for all.”

With so many SVOD services available, operators will want SVOD providers to create their apps for themselves. That means the app platform must be a robust app environment with support for standard web languages and design tools. It should also be easy to maintain and update the apps to support the latest service features. Also, SVOD providers will look for the following features:

- Supports the gathering of user activity data.
- Protects user data from the operator and other apps.
- Allows the SVOD provider to leverage pay TV support services if needed.

Data is a particularly important subject for SVOD providers. Adeline Cassin, CuriosityStream’s Chief

Marketing Officer, says user data can help her service and the operator:

“Data and analytics are also important here. Ideally, the aggregator will provide us with audience insights, which better serve us in how we recommend to the aggregator to market our service and content, making this a win-win for all.”

In addition to compliance with regional data privacy laws such as the European General Data Protection Regulation (GDPR), individual SVOD services may guard the data they gather on their users jealously. They will want assurances, just as Netflix demanded of Wao!, that no one but them will have access to it.

Some SVOD providers will look to operators to help with support services. For example, CuriosityStream works with pay TV operators on several back-office functions, according to Ms. Cassin:

“With our MVPD partners, they support billing/sales and customer management/service. They really own the customers and all data that are associated with each. We also work closely to ensure that our content library is in sync. As long as data and analytics are shared, this is a great scenario.”

The app platform needs to facilitate this extended relationship between operator and SVOD provider.

Features That Serve Pay TV/SVOD Subscribers

Finally, the app platform must provide, at a minimum, the following benefits to pay TV operator subscribers:

- Fully integrates with the pay TV experience.
- Provides access to all the apps used.
- Ensures all the apps keep pace with the latest features and functionality.

Without these three key benefits, it is very likely a pay TV subscriber will use a third-party platform that does provide these benefits. If the operator does not have a key SVOD service a customer is looking for, she will likely turn to a Roku or Apple TV for it. Moreover, she may end using the device for all her online viewing needs.

Onboarding Process

The SVOD onboarding process defined by the app platform is of paramount importance to both the pay TV operator and the SVOD provider. It must provide the following benefits:

- Simple to add and remove services
- Easy to maintain and update apps
- Easy to connect with operator functions and services

An efficient and speedy onboarding process is essential. Certainly, getting the first version of an SVOD app approved and available as quickly as possible is important. After all, every day a hot new service is not available is an opportunity for a subscriber to switch to a smart TV or Roku as their SVOD platform of choice.

However, speed and efficiency are even more important in the ongoing maintenance of the operator's app store, the place where subscribers come to browse and find new SVOD services.

From the SVOD providers' perspective, it is normal for them to want to make frequent, sometimes daily, updates to provide new features and fix problems. Multiply this need across all the services available and it's clear why the pay TV operator needs an efficient onboarding process. Anything less and the burden of app updates on the operator's operational staff could become untenable.

CONCLUSIONS

In some respects, SVOD aggregation is simply an extension of what pay TV operators have been doing for decades. However, there is a fundamental difference between delivering television channels and SVOD services. Viewers in the 1980s had no alternative to cable if they wanted to watch HBO or Sky Sports. SVOD users always have the option of going to an SVOD provider directly. Providing value beyond simple aggregation is key if a pay TV operator is to be a successful SVOD aggregator.

The app platform is a critical choice in ensuring that success. It must allow the operator to create value beyond simple aggregation. That value includes binding the SVOD services tightly into the overall STB experience.

Speed and agility are also critical in the successful transition to SVOD aggregator. The app platform must be able to deliver it for the operator to keep up with the fast-evolving SVOD market.

Some operators may be tempted by the idea of building an app platform and app store. In most cases, doing so would be a mistake.

Keeping the app platform a vibrant and up-to-date environment requires a large, permanent engineering team. Finding a third party company with an app platform and an engineering team dedicated to maintaining it may be a much better approach.

Finally, a word of caution. It is easy for a few very popular services to garner an operator's exclusive focus. After all, these are the services that most of the operator's subscribers are using. However, a lesson learned by pay TV operators years ago is worth keeping in mind.

People generally don't watch more than 17 TV channels, no matter how many they can access. Of course, most people watch the popular channels at least some of the time. However, somewhere in that list of 17 watched channels will be one or two that are much less popular.

There is no reason to think that consumers will behave any differently with SVOD services.

To be sure, most will have Netflix, Amazon Prime Video, and Disney (when it becomes available). However, they will also subscribe to niche

services that feed their interests. SVOD services like Kundalini Yoga TV, TheSurfNetwork, and British Pathe TV will not drive huge subscriber numbers. Taking all the niche and smaller services together, however, most people will want to use one or two of them.

Figuring out how to ensure the right mix of SVOD services is available will be a major challenge for operators stepping into the role of SVOD aggregator. Nevertheless, it is a critical one. If subscribers know the operator app store is a reliable place to search for new services, they will have no reason to go elsewhere.

Moreover, keeping people in the operator experience for as long as possible is the best way to make sure pay TV services remain a vital part of a customer's entertainment mix.

SVOD users always have the option of going to an SVOD provider directly. Providing value beyond simple aggregation is key if a pay TV operator is to be a successful SVOD aggregator.

Somewhere in the 17 TV channels that a consumer regularly watches will be one or two that appeal only to a minority interest. There is no reason to believe that people will behave any differently with SVOD services.

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www.nScreenMedia.com
 For more information contact:
Info@nScreenMedia.com