



# TVE TRACKING: AUGUST 2018 RESULTS



## Current Wave: We surveyed 3,817 MVPD subscribers on a continuous basis from June through August, 2018

- All respondents are age 18-74, and watch at least 5 hours of TV per week
- The sample included a range of TV Everywhere users\*  
*(weighted to their proper proportions in the consumer population)*

	Interviews Completed
Non-users:	491
Light TVE Users (once per month or less)	785
Moderate TVE Users (weekly or several times per month)	947
Heavy TVE Users (daily or several times per week)	1,594

### \* CHANGE IN DEFINITION OF TVE USER:

In earlier waves of the TVE tracker, TVE users were defined as respondents who confirmed that they had entered their MVPD username and password on a TVE source at least once. This approach was used to differentiate those who had accessed TV content from a TVE source requiring authentication from a source that did not require authentication. Given that virtually all TVE sources now require login, and given that many MVPDs provide auto sign-on, we no longer asked respondents whether they had authenticated.



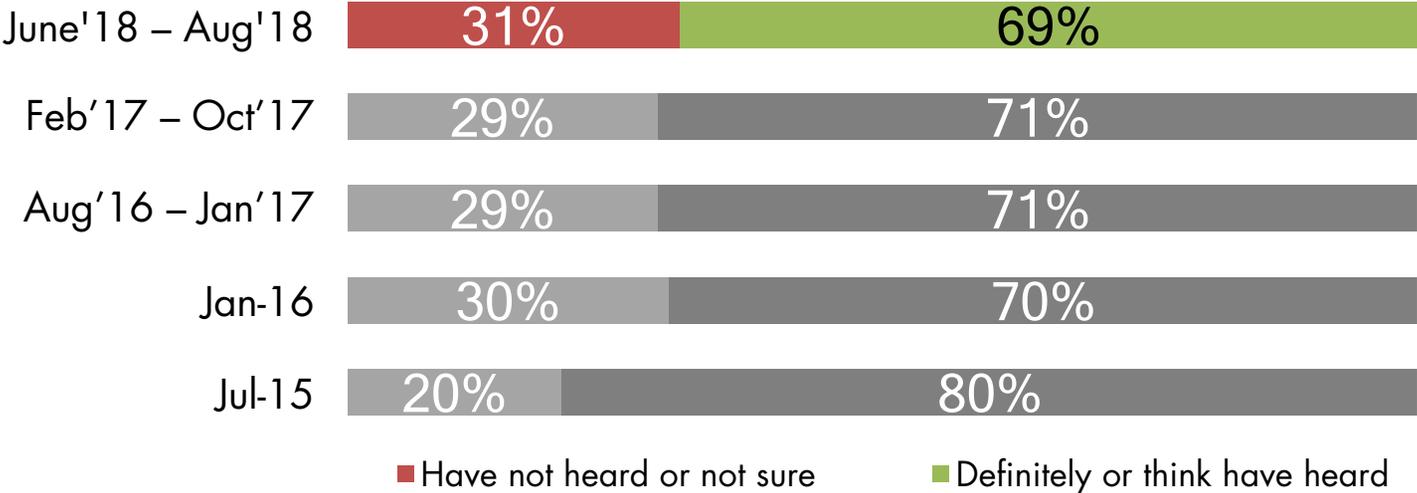
## **SUMMARY OF KEY TVE USAGE MEASURES**

Among MVPD subs, awareness of the “concept” of TV Everywhere is statistically identical to 2017

**Age 18-64: MVPD SUBS**

Aided Awareness

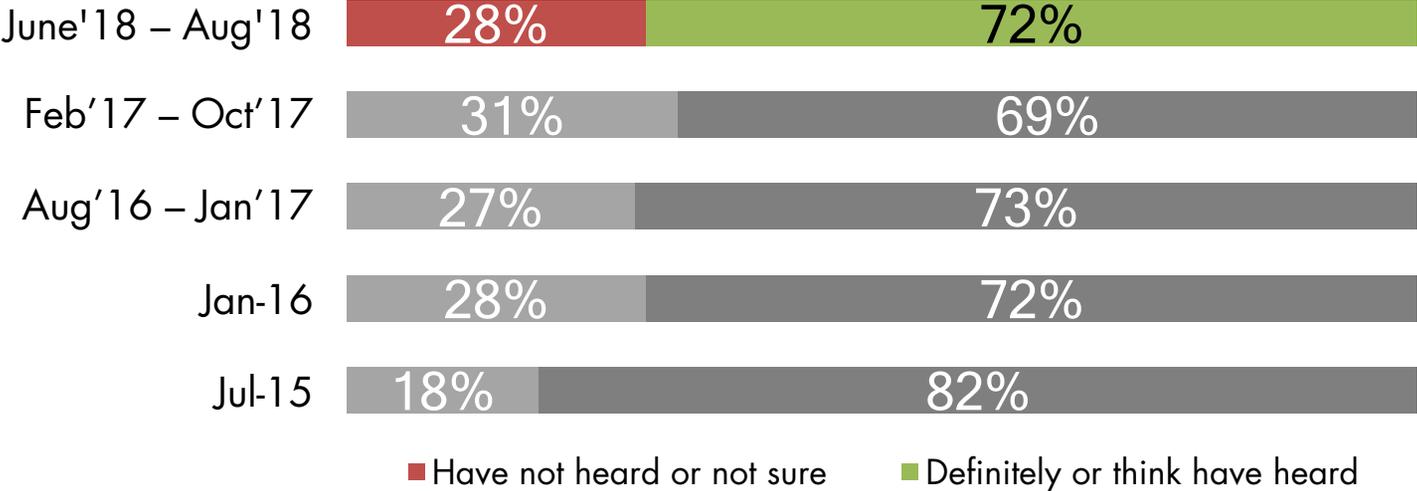
Top two box (% who say definitely have heard or think have heard)



However, overall awareness of the TVE concept is up a directional 3 points among cable subs in particular

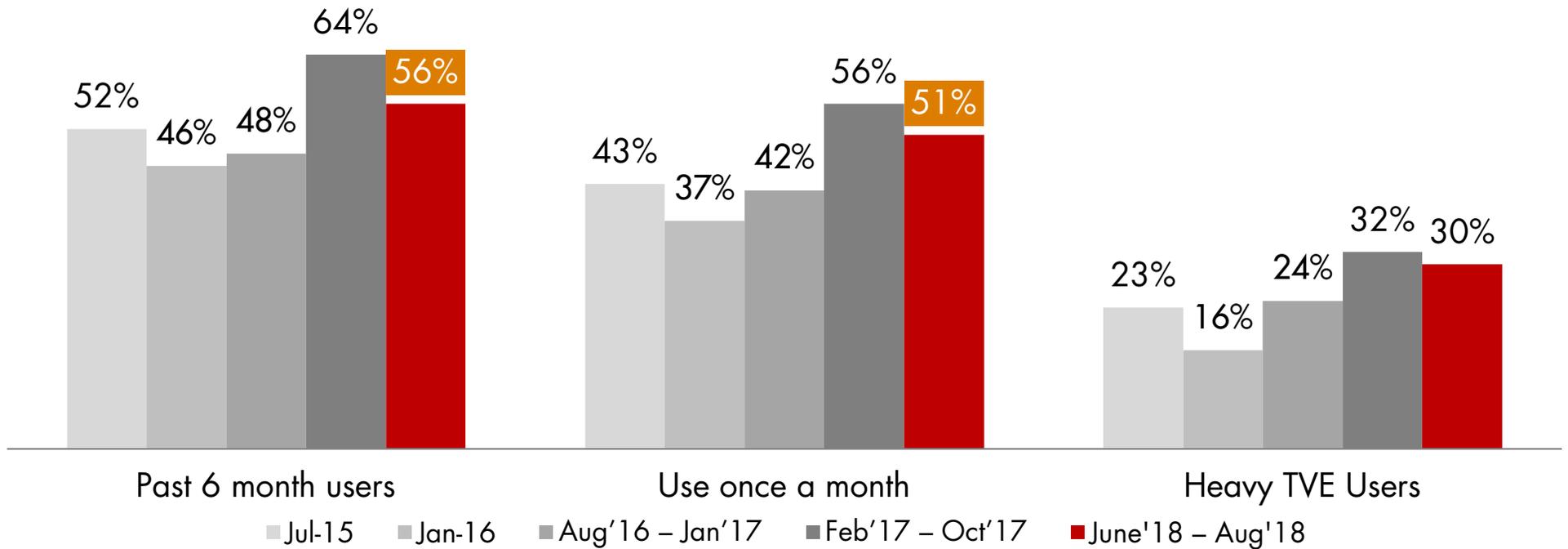
### Age 18-64: CABLE SUBS

Aided Awareness  
Top two box (% who say definitely have heard or think have heard)



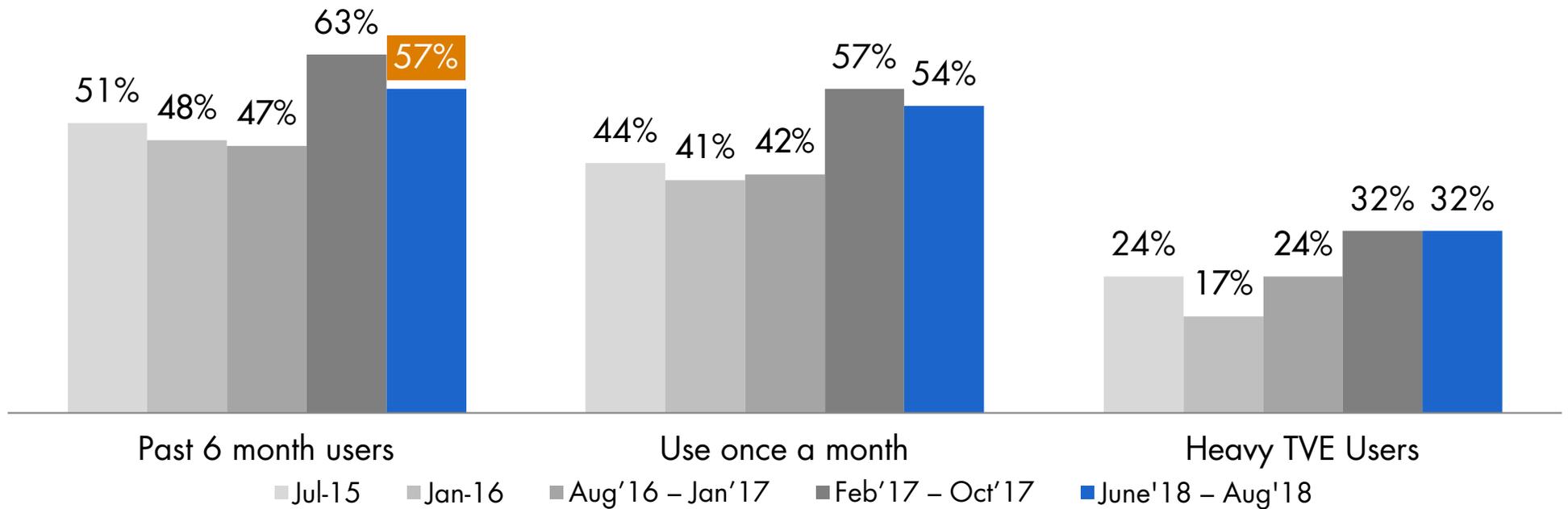
Past-month and past six-month use of IVE has dropped among MVPD consumers; the percentage of heavy users has remained stable—but all are still higher than 2016

**Age 18-64: MVPD SUBS  
TVE USE**



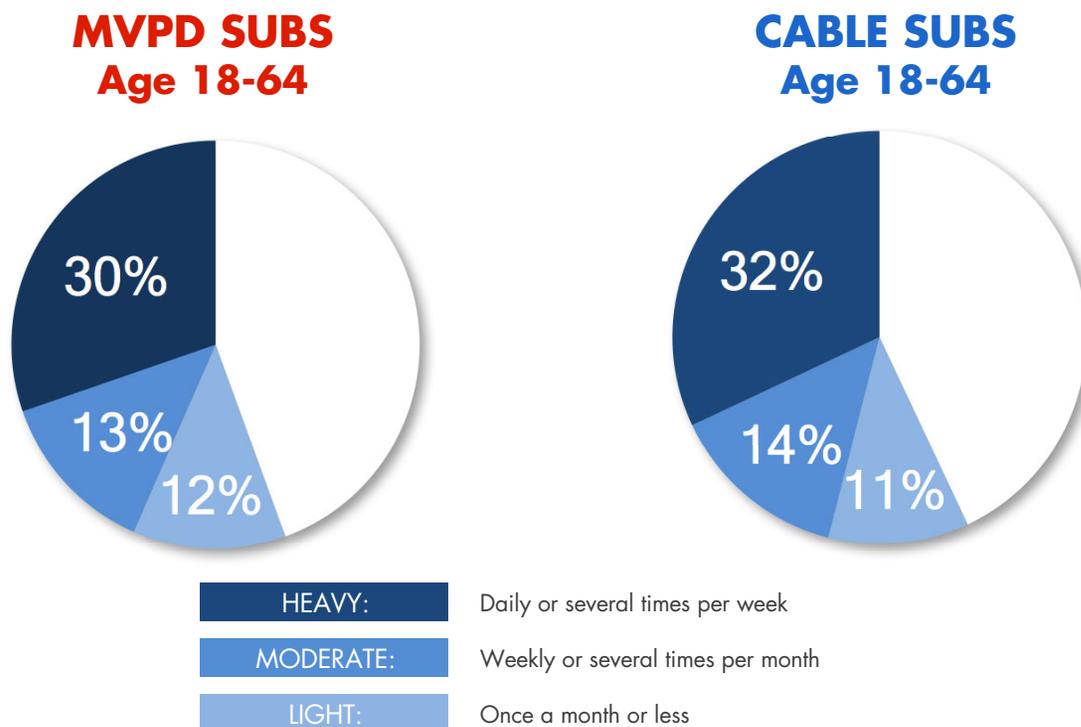
For cable subscribers, past 6-month use has declined significantly; past month use, and heavy use, are statistically unchanged—again, all 2017 measures are higher than 2016

**Age 18-64: CABLE SUBS  
TVE USE**



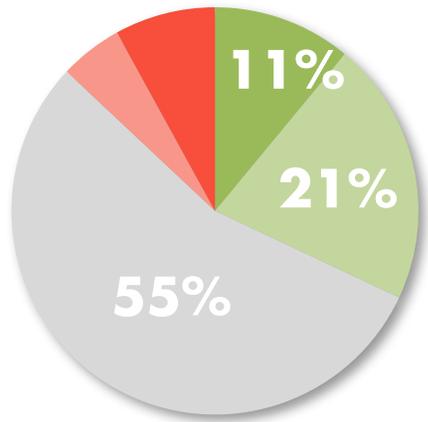
The percent of all subscribers who use TV Everywhere at least several times a week has not changed significantly since last year

## Extent of TVE Use in Past Six Months



However, continuing a trend we've seen over the past few waves, among those who DO use TVE to some extent, about one-third say they're using it more than a year ago

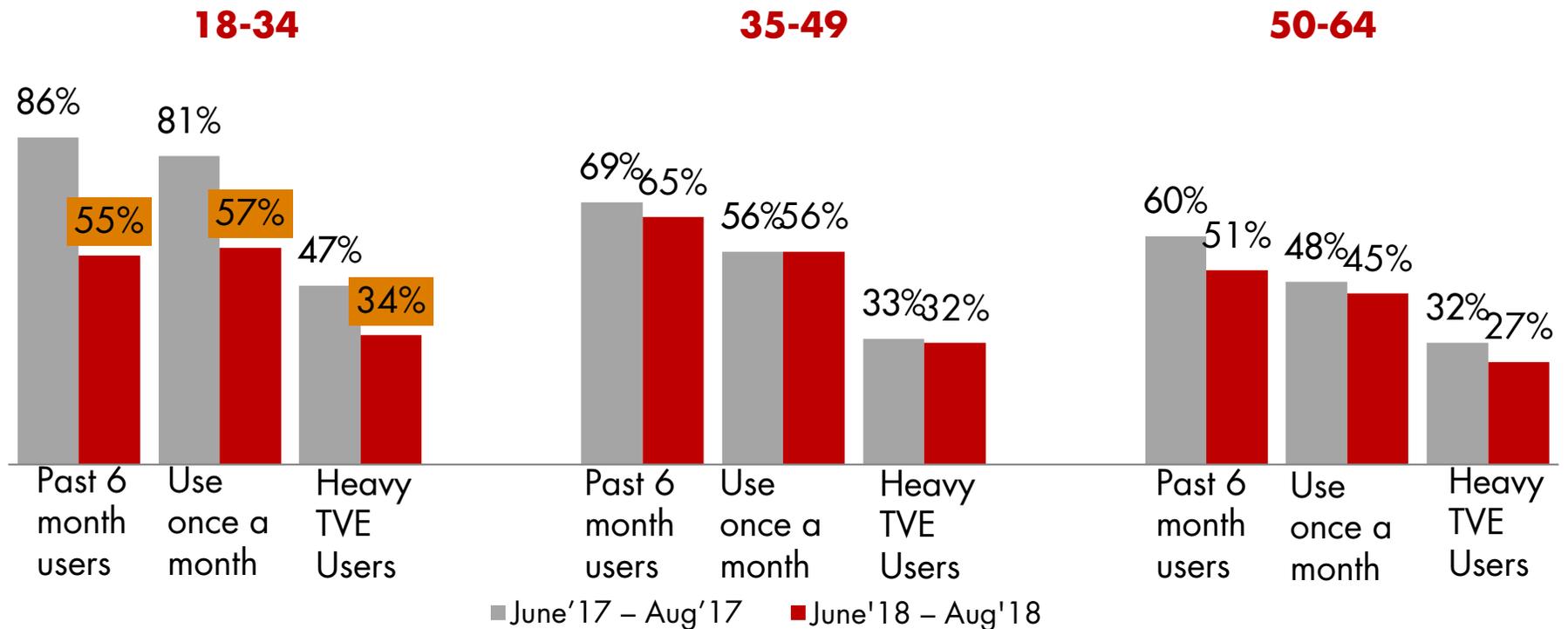
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Although the declines aren't large enough to be significant, all 3 major measures of TVE use have declined among 18-34 year old MVPD subs since 2017; other segments have stayed the same

## Age 18-64: MVPD SUBS TVE USE

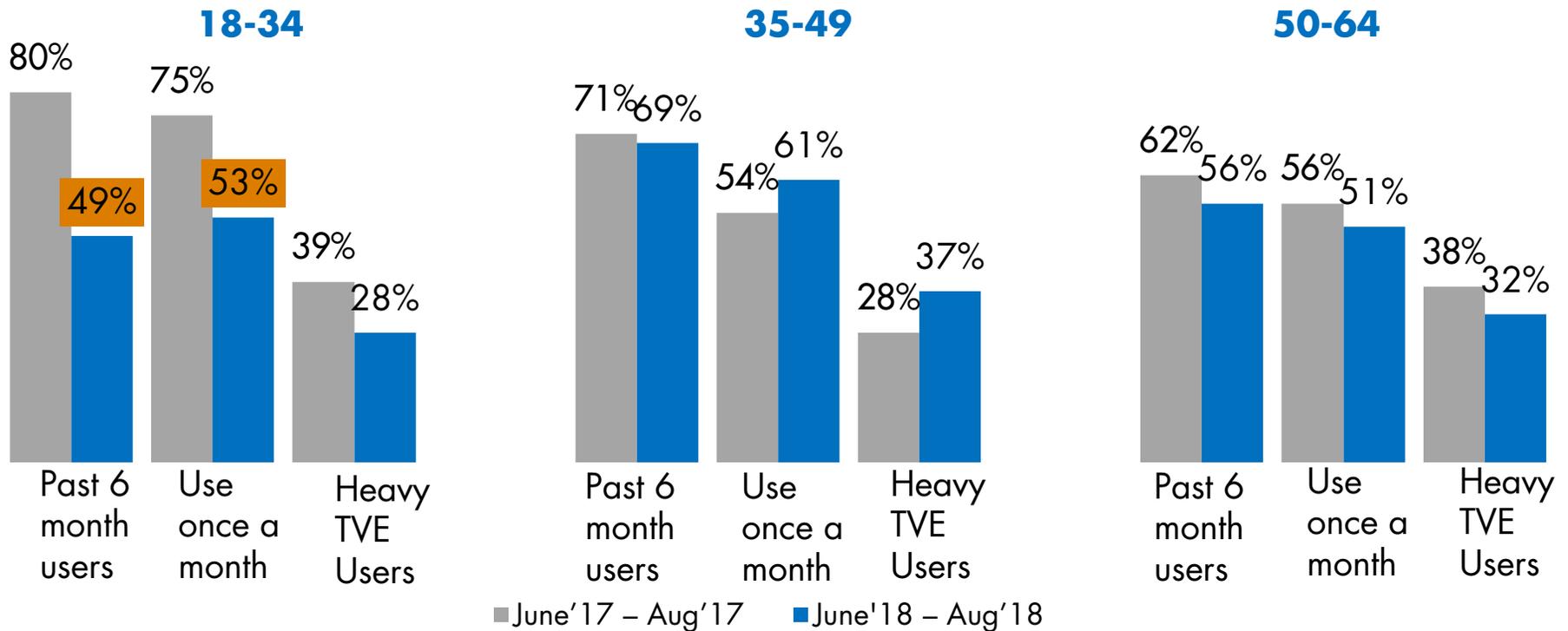
BASED ON JUN-AUG 2017 VS.  
2018



Among cable subs, the major IVE measures have dropped directionally for 18-34 year olds since 2017, remained stable for 50-64 year olds, and increased for 35-49 year olds

## Age 18-64: CABLE SUBS TVE USE

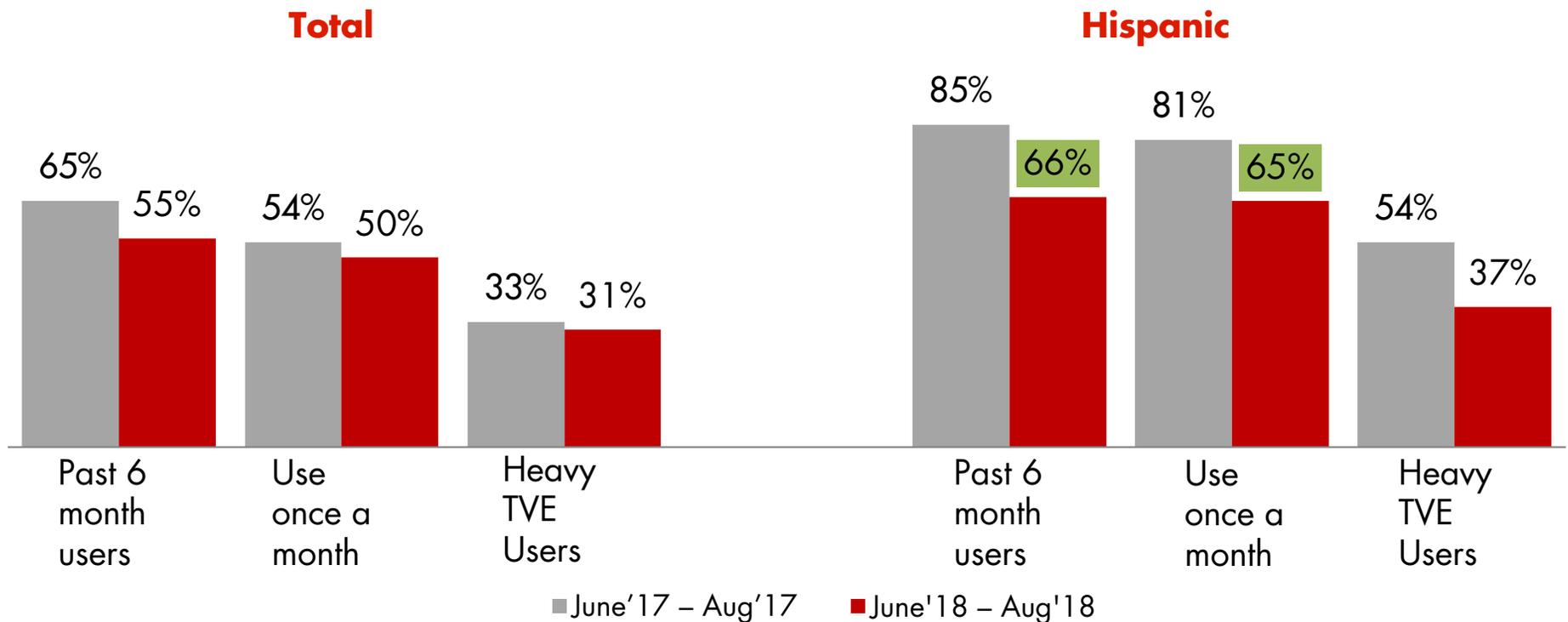
BASED ON JUN-AUG 2017 VS. 2018



As in prior waves, Hispanic MVPD subs are heavier users of TVE; although their use has dipped since last year—although past 6-month and past month use is up from 2016

## Age 18-74: HISPANIC MVPD SUBS TVE USE

BASED ON JUN-AUG 2017 VS.  
2018

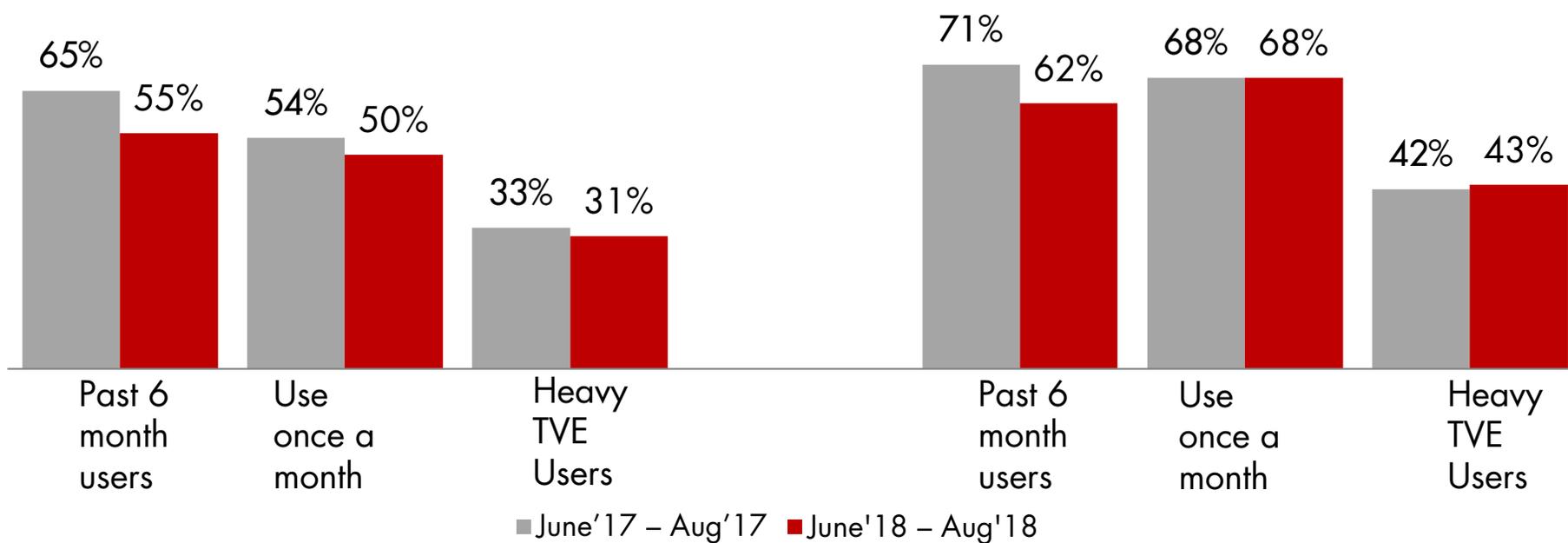


# The same pattern holds for African American MVPD subs—higher use of TVE than among all subscribers, but slight drops since 2017

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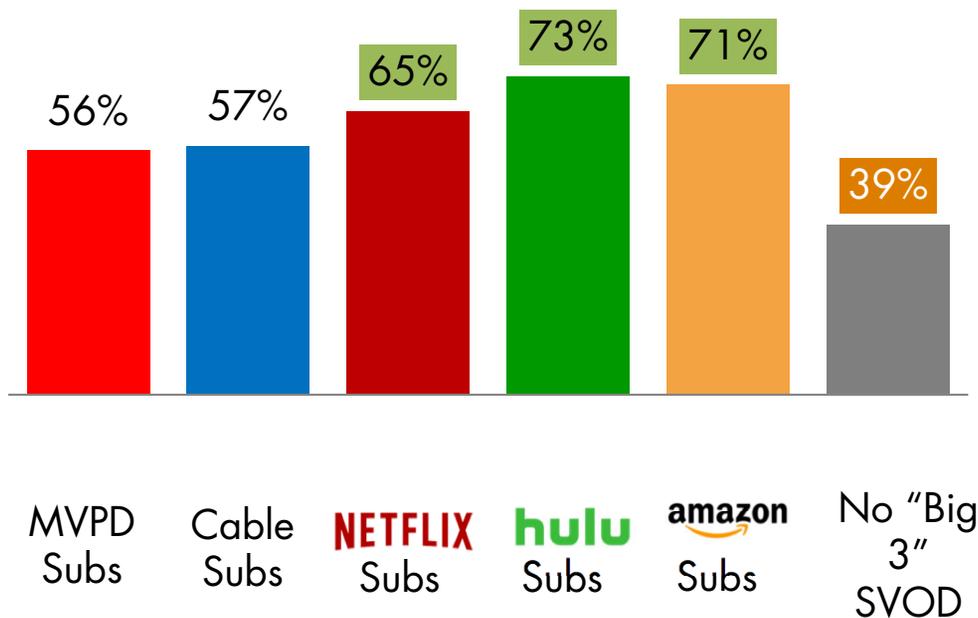
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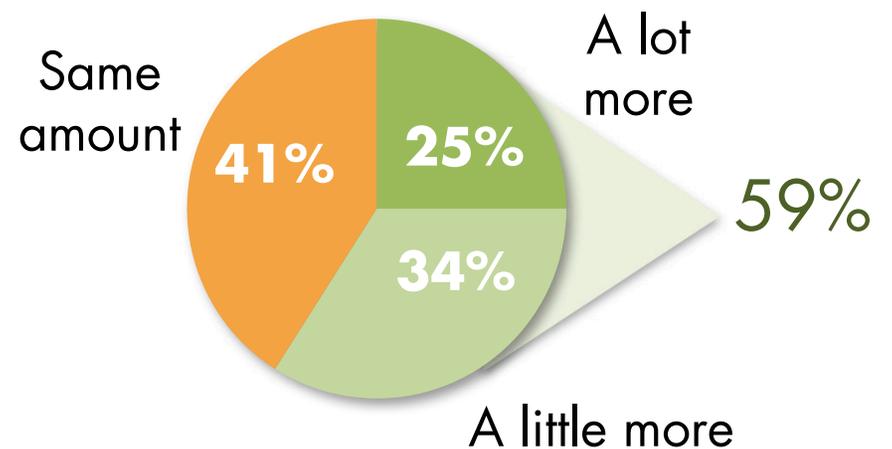


As in past waves, SVOD subscribers are heavier users of TVE; in fact, TVE cannibalizes OTT services to some degree, with 6 in 10 saying they'd watch more OTT if it didn't exist

**Age 18-64: MVPD SUBS  
TVE USE (PAST 6 MONTHS)**



**IF NO TVE, WOULD WATCH OTT SERVICES...  
(BASE: 18-64 MVPD TVE USERS WITH OTT)**





## Usage

How many people are using TVE, and how often

# As we saw earlier, past month and past six-month TVE use has dropped significantly among MVPD subscribers, although 2018 levels are higher than 2016

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	July 2015	January 2016	Aug'16 – Jan'17	Feb'17 – Oct'17	–. / 01! 2#3 ' . 4 1! 2
Aided (after concept described): Top Box	56%	46%	44%	44%	39%
Aided (after concept described): Top-2 Box	80%	70%	71%	71%	69%
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NET: Usage in past 6 months	52%	46%	48%	64%	56%
NET: Usage once a month	43%	37%	42%	56%	51%
Heavy TVE Users	23%	16%	24%	32%	30%
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NET: More positive perception	53%	53%	49%	45%	40%
NET: More value for the money	59%	56%	54%	48%	42%

# Cable subs have also seen a drop in past six month TVE use since 2017, but other measures of awareness, use, and perception have remained stable among this segment

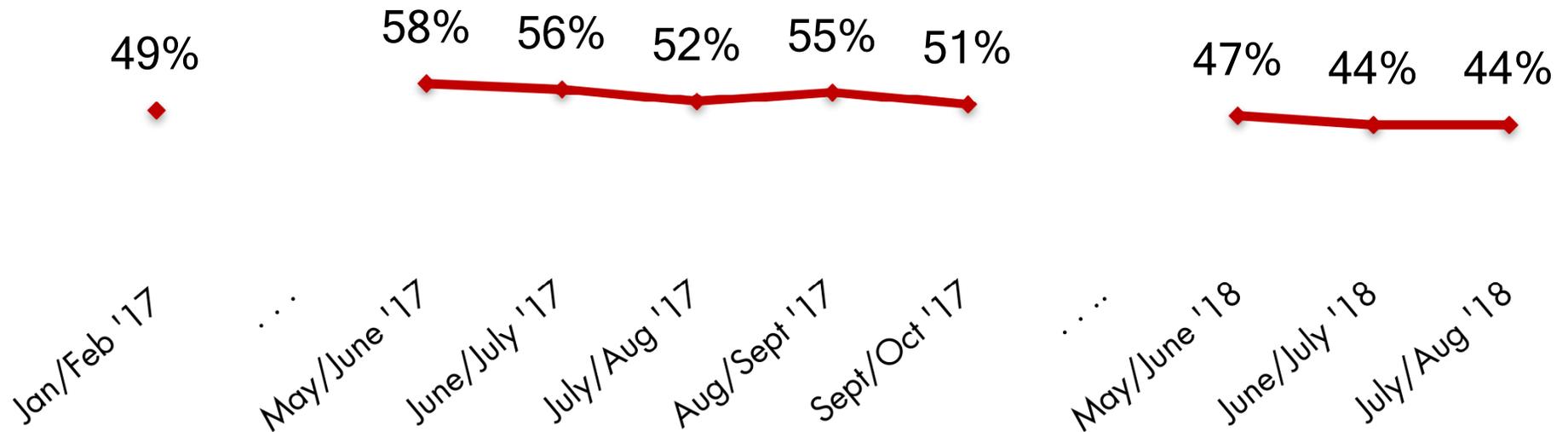
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	July 2015	January 2016	Aug'16 – Jan'17	Feb'17 – Oct'17	– . / 0 1! 2 # 3 ' . 4 1! 2
Aided (after concept described): Top Box	57%	47%	42%	42%	40%
Aided (after concept described): Top-2 Box	82%	72%	73%	69%	72%
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NET: Usage in past 6 months	51%	48%	47%	63%	57%
NET: Usage once a month	44%	41%	42%	57%	54%
Heavy TVE Users	24%	17%	24%	32%	32%
9 ' # \$ % & # ; < ' = \$ ,					
> ? @ ABC / # ? 0 DA 0 ? BC / F # @ / G # H @ I . 0 # C J # A @ K ID # AC > ? @ / L					
NET: More positive perception	51%	53%	49%	41%	35%
NET: More value for the money	56%	57%	54%	43%	38%

After peaking last summer, past month use of TV among MVPD subs has gradually declined month by month

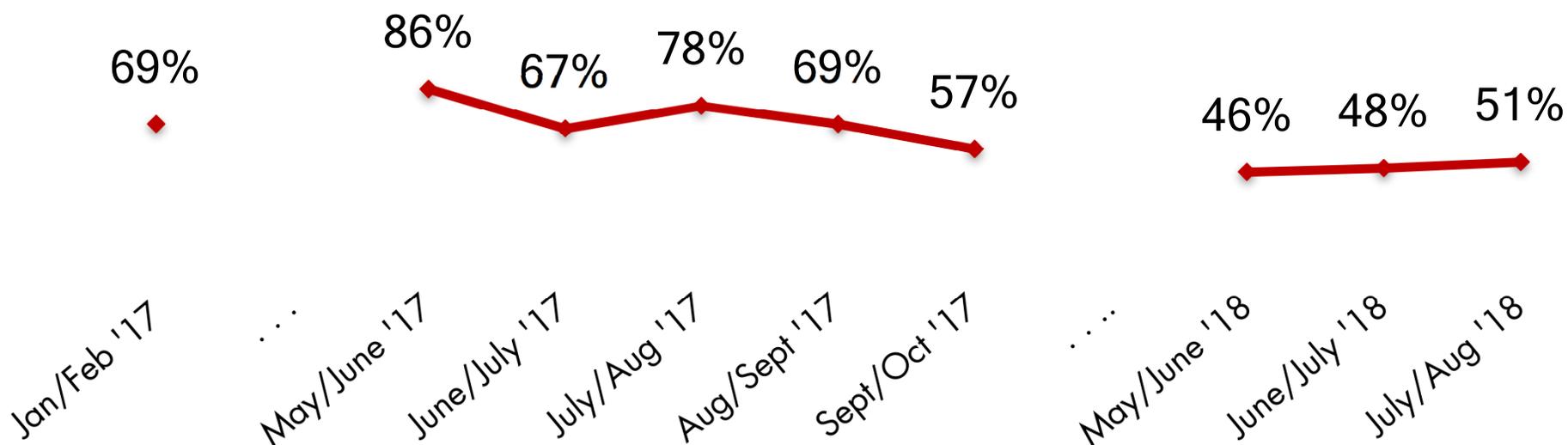
## Age 18-64: MVPD SUBS PAST MONTH TVE USE



▲ Significantly higher than same month a year ago    ▼ Significantly lower than same month a year ago

Use of TVE on a monthly basis among 18-34 year olds—which historically varied widely—has dropped considerably since 2017

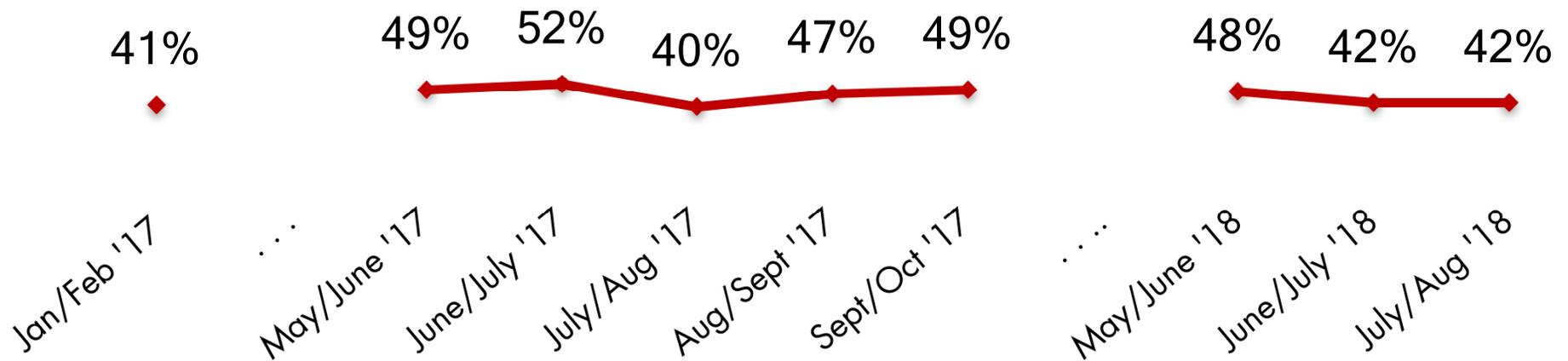
## Age 18-34: MVPD SUBS PAST MONTH TVE USE



▲ Significantly higher than same month a year ago    ▼ Significantly lower than same month a year ago

Month-to-month use of TVE has traditionally been more stable among 35-64 year olds, but it's a notch lower this year than last

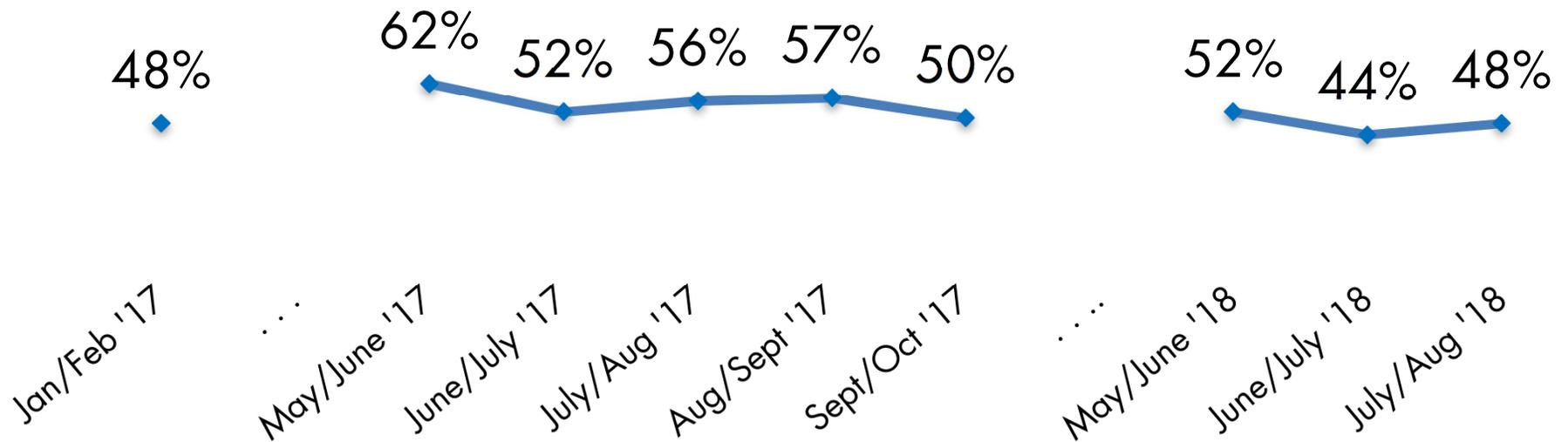
## Age 35-64: MVPD SUBS PAST MONTH TVE USE



▲ Significantly higher than same month a year ago    ▼ Significantly lower than same month a year ago

Monthly TVE use is generally lower this year among cable subs, although use varies more, up and down, than we saw among MVPD subscribers

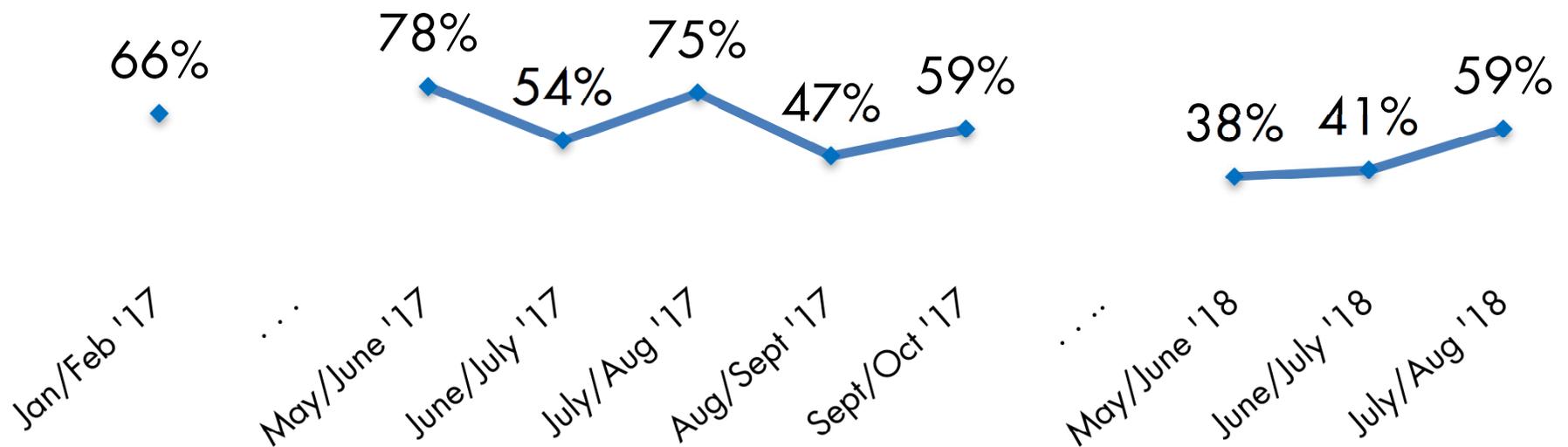
## Age 18-64: CABLE SUBS PAST-MONTH TVE USE



▲ Significantly higher than same month a year ago    ▼ Significantly lower than same month a year ago

As with MVPD customers generally, we see wide variations in monthly IVE use among 18-34 year olds: with use increasing dramatically between June and July of this year

## Age 18-34: CABLE SUBS\* PAST-MONTH TVE USE



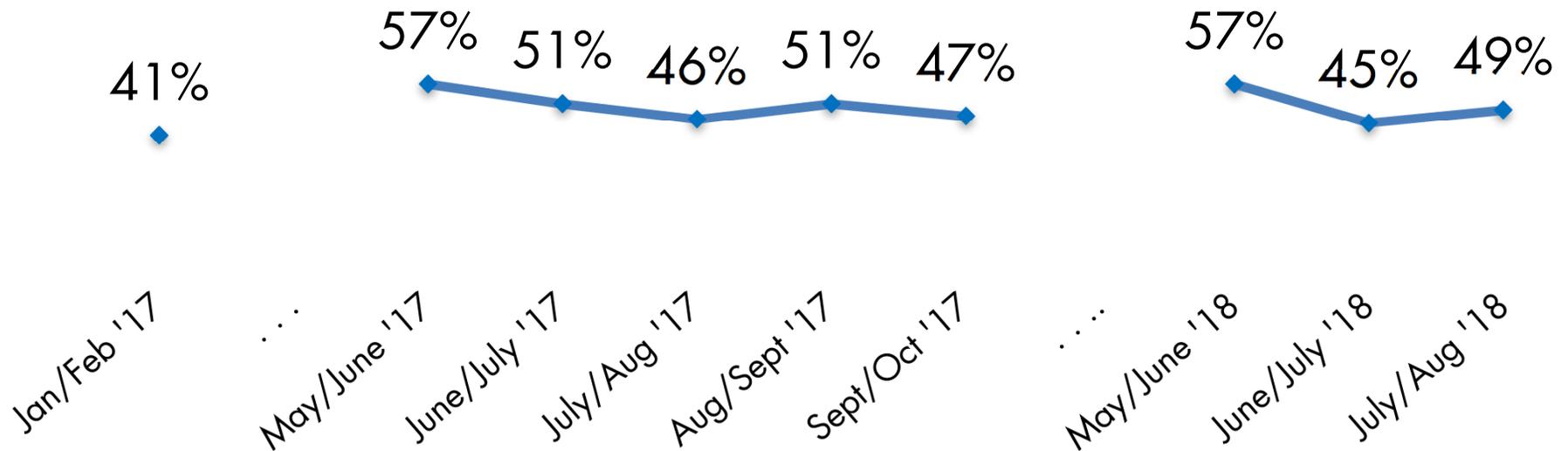
◆ Significantly higher than same month a year ago
 ◆ Significantly lower than same month a year ago

\* Sample size for the last three months is as follows: June '18 (251); Jul '18 (241); Aug '18 (146)

Q4D: For which of these have you entered your [PROVIDER] account information in the past MONTH in order to watch streaming full-length TV shows, sports programs, or movies online?

Older cable subscribers' monthly use of TVE is at a similar level to 2017

## Age 35-64: CABLE SUBS PAST-MONTH TVE USE



▲ Significantly higher than same month a year ago    ▼ Significantly lower than same month a year ago

After having increased dramatically last year, use of TVE among 18-34 year old MVPD subs has dropped back to 2016 levels; other age groups have seen directional declines

**Age 18-64: MVPD SUBS**

BASED ON JUN-AUG 2017 VS. 2018

**1. TVE AWARENESS:**

Aided: Top Box  
Aided: Top-2 Box

**18-34**

Jun'17 - June'18  
Aug'17 - Aug'18

48% 39%  
76% 73%

**35-49**

Jun'17 - June'18  
Aug'17 - Aug'18

43% 42%  
76% 71%

**50-64**

Jun'17 - June'18 -  
Aug'17 - Aug'18

45% 38%  
68% 67%

**2. TVE USAGE:**

NET: Usage in past 6 months  
NET: Usage once a month  
Heavy TVE Users

86% 55%  
81% 57%  
47% 34%

69% 65%  
56% 56%  
33% 32%

60% 51%  
48% 45%  
32% 27%

**3. TVE IMPACT:**

NET: More positive perception  
NET: More value for the money

71% 50%  
67% 57%

50% 43%  
53% 43%

30% 33%  
35% 33%

The story is similar for cable subs: 18-34 year old TVE use dropped from 2018 but is higher than 2016; 35-49 year olds see directional increases

## Age 18-64: CABLE SUBS

BASED ON JUN-AUG 2017 VS. 2018

### 1. TVE AWARENESS:

Aided: Top Box

Aided: Top-2 Box

### 2. TVE USAGE:

NET: Usage in past 6 months

NET: Usage once a month

Heavy TVE Users

### 3. TVE IMPACT:

NET: More positive perception

NET: More value for the money

	18-34		35-49		50-64	
	Jun'17 - Aug'17	June'18 - Aug'18	Jun'17 - Aug'17	June'18 - Aug'18	Jun'17 - Aug'17	June'18 - Aug'18
Aided: Top Box	47%	37%	42%	45%	43%	40%
Aided: Top-2 Box	71%	73%	72%	70%	65%	72%
NET: Usage in past 6 months	80%	49%	71%	69%	62%	56%
NET: Usage once a month	75%	53%	55%	61%	56%	51%
Heavy TVE Users	39%	28%	28%	37%	38%	32%
NET: More positive perception	66%	45%	45%	40%	31%	28%
NET: More value for the money	55%	56%	47%	39%	33%	28%

# Hispanics remain heavier TVE users than MVPD subs generally, and their use in 2018 is higher than it was in 2016—but all measures are lower than a year ago

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BASED ON JUN-AUG 2017 VS.

2016

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Aided: Top Box

43%

38%

41%

44%

Aided: Top-2 Box

70%

67%

60%

74%

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NET: Usage in past 6 months

65%

55%

85%

66%

NET: Usage once a month

54%

50%

81%

65%

Heavy TVE Users

33%

31%

54%

37%

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NET: More positive perception

40%

37%

83%

62%

NET: More value for the money

44%

40%

81%

58%

# African American MVPD subscribers are also heavier than average TVE users, although their use measures have also dropped from a year ago

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BASED ON JUN-AUG 2017 VS. 2016

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Aided: Top Box  
Aided: Top-2 Box

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NET: Usage in past 6 months  
NET: Usage once a month  
Heavy TVE Users

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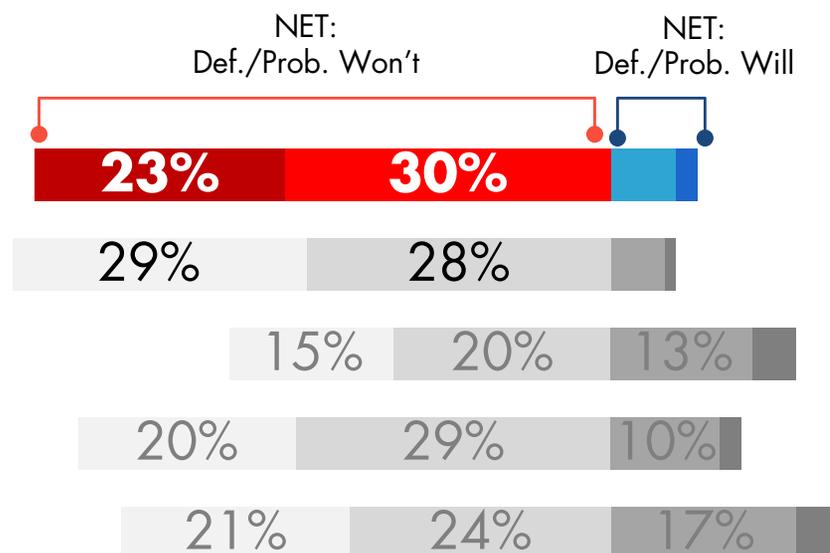
NET: More positive perception  
NET: More value for the money

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Aided: Top Box	43%	38%	59%	44%
Aided: Top-2 Box	70%	67%	67%	70%
NET: Usage in past 6 months	65%	55%	71%	62%
NET: Usage once a month	54%	50%	68%	68%
Heavy TVE Users	33%	31%	42%	43%
NET: More positive perception	40%	37%	72%	52%
NET: More value for the money	44%	40%	66%	51%

Only 8% of MVPD customers who don't use TVE today say they'll begin using it in the future: not significantly different from what was the case in 2017

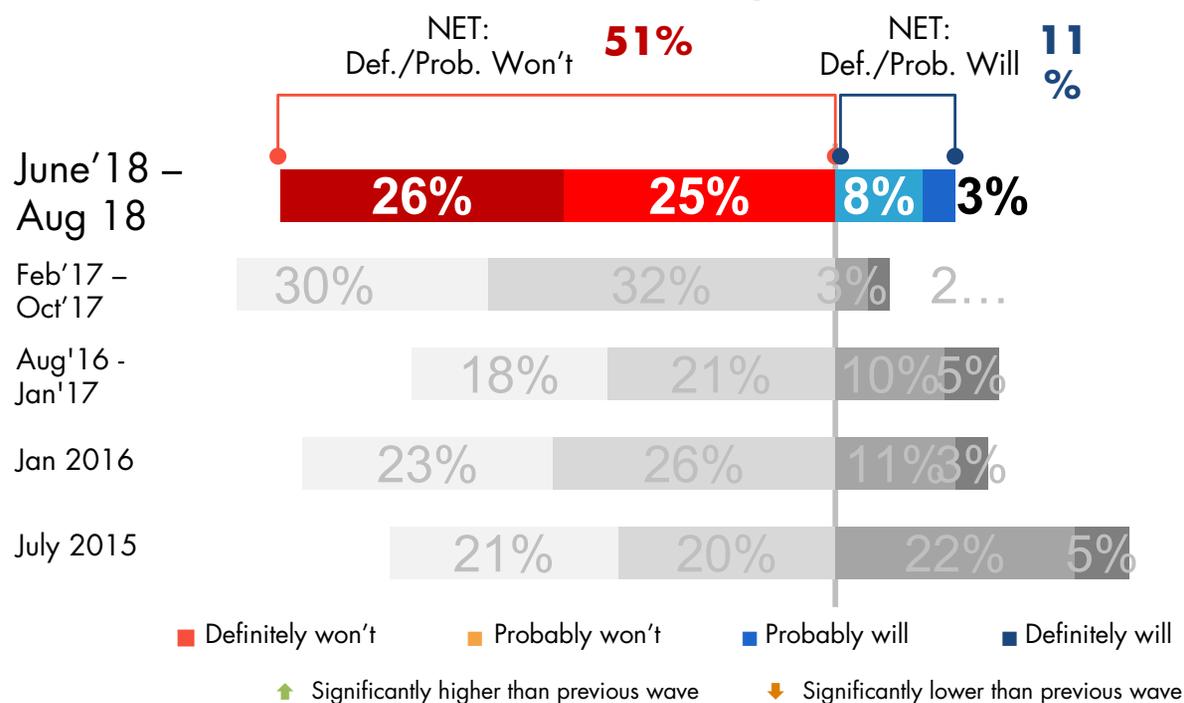


Q4H: In the next 6 months, how likely are you to...enter your [PROVIDER] account information to watch streaming shows, sports, events or movies?

Results are similar for cable subs: just 11% of non-users say they'll begin using TVE in the future—although that's directionally different from the percent who said so in 2017

## Cable Subs: Age 18-64

Non-User Likelihood to Begin Using



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Last year saw at least directional increases in use of virtually all TVE sources among MVPD subs; this year, results have returned to 2016 levels

**Age 18-64: MVPD SUBS**

Sites or apps from...

	Aug'16 - Jan'17	Feb'17 - Oct'17	Jun'18 - Aug'18
<b>BASIC CABLE NETWORK</b>	27%	35%	28%
<b>BROADCAST NETWORK</b>	22%	29%	24%
<b>PREMIUM CHANNEL</b>	20%	25%	19%
<b>MVPD</b>	22%	22%	19%
<b>CABLE SPORTS</b>	20%	22%	19%
<b>CABLE CHANNEL NEWS</b>	18%	22%	19%

Significantly higher than previous wave

Significantly lower than previous wave

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The trend we've seen in prior waves continues in 2018: the heaviest TVE users are also heavier than average users of SVODs and other online sources of TV

June'18 – Aug'18*	CABLE SUBS Age 18-64	MVPD SUBS Age 18-64	MONTHLY TVE USERS Age 18-64
<b>NETFLIX</b>	57%	57%	68%↑
<b>amazon</b> Prime instant video	30%↓	34%	44%↑
<b>hulu</b>	16%	17%	24%↑
<b>HBO NOW</b> <sup>SM</sup>	5%	6%	11%↑
<b>You Tube TV</b>	2%	4%	7%↑
DirecTV Now	1%	3%	5%↑
<b>CBS ALL ACCESS</b> <sup>AI</sup>	2%	3%	5%↑
Ever order shows and movies and pay for them separately	35%	36%	51%↑

\* Services with 3% total subscribing shown

↑ Significantly higher than MVPD subs

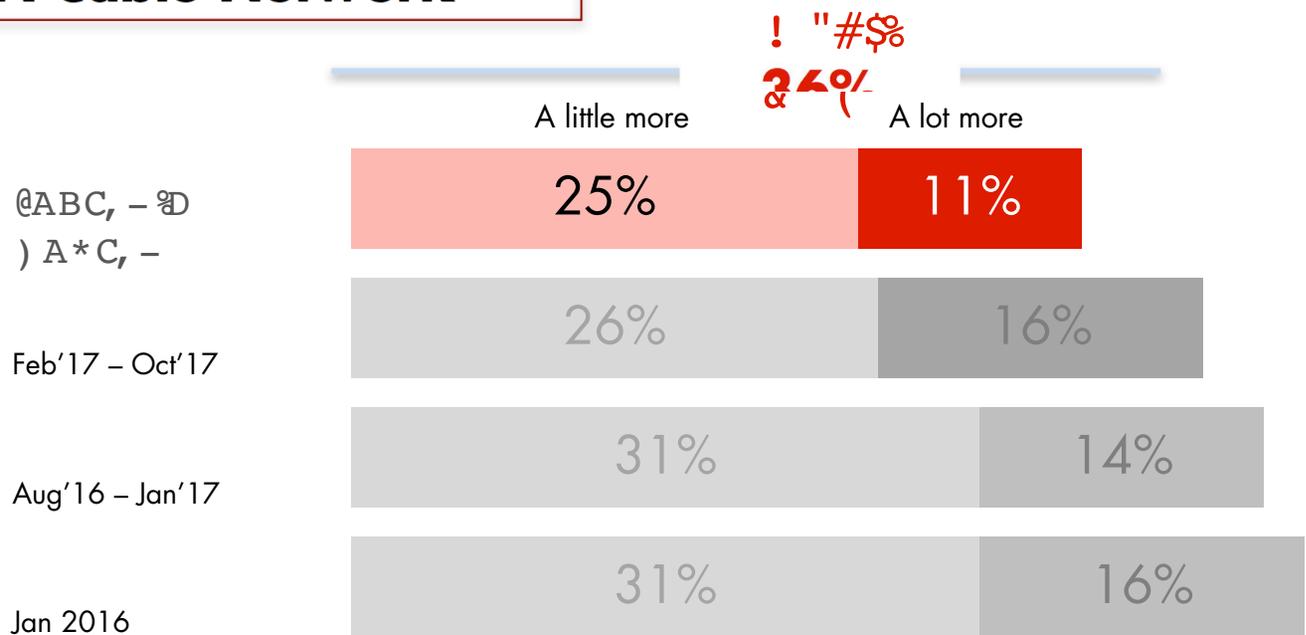
↓ Significantly lower than MVPD subs



# **VALUE IMPACT**

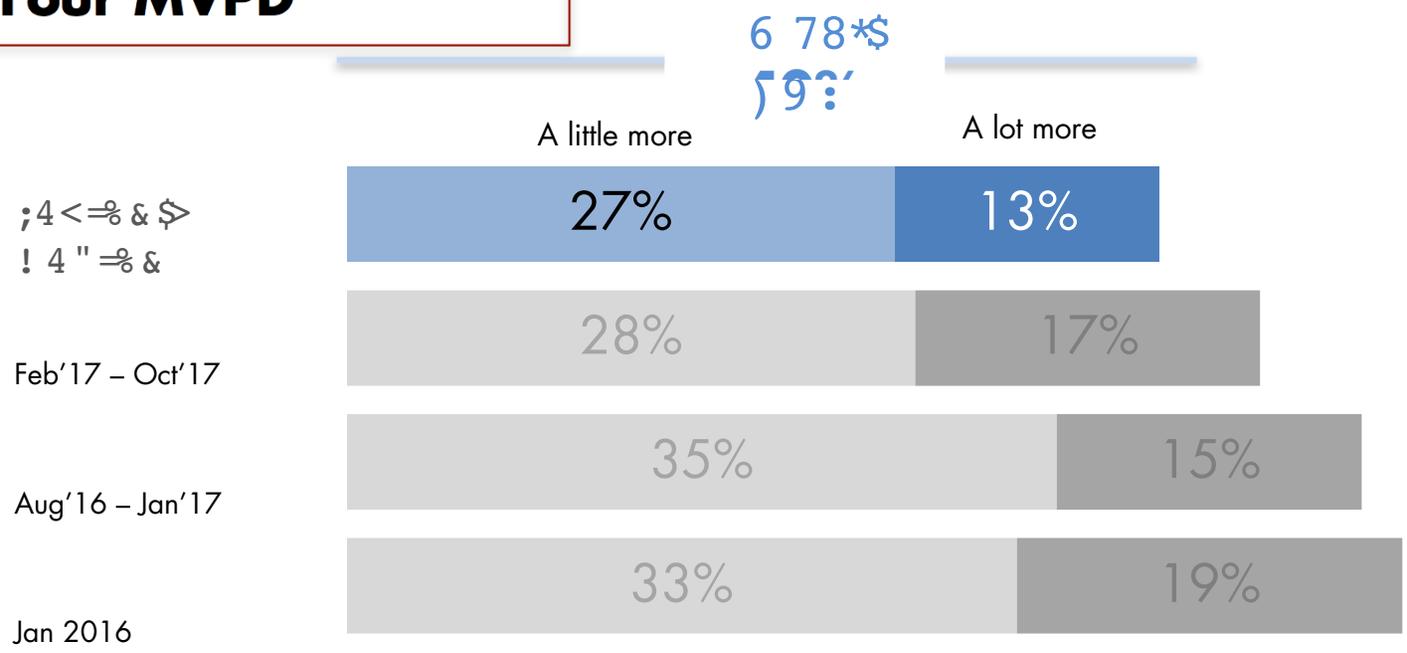
As TV Everywhere capabilities continue to be seen as an “expectation”, the proportion saying it makes them feel more positive about cable networks continues to drop

**Age 18-64: MVPD SUBS**  
 % more positive about...  
**A Cable Network**



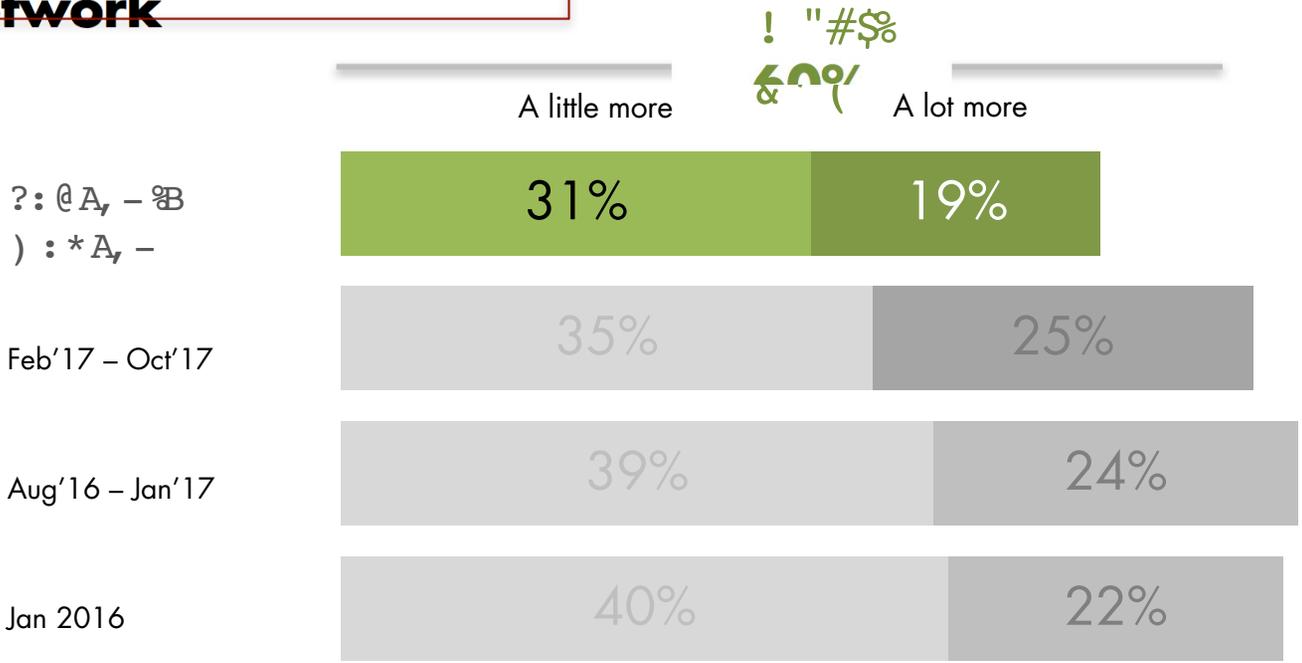
The same holds true for feelings about MVPD service; with TVE now largely expected, fewer subscribers say it makes them feel more positive

**Age 18-64: MVPD SUBS**  
 % more positive about...  
**Your MVPD**



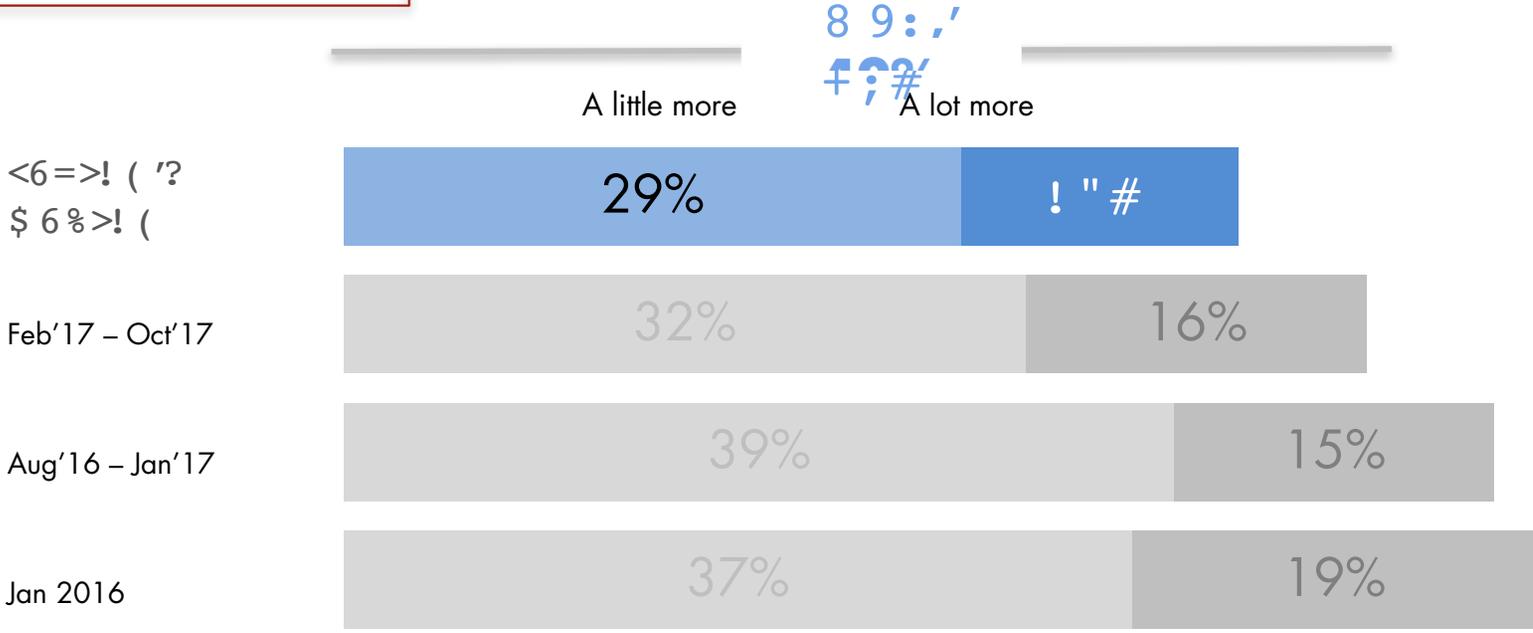
We also see a decline in the proportion of MVPD subs saying TVE makes them feel that they get more value from their premium network subscription

**Age 18-64: MVPD SUBS**  
 % perceive more value for the money  
**A Premium Network**



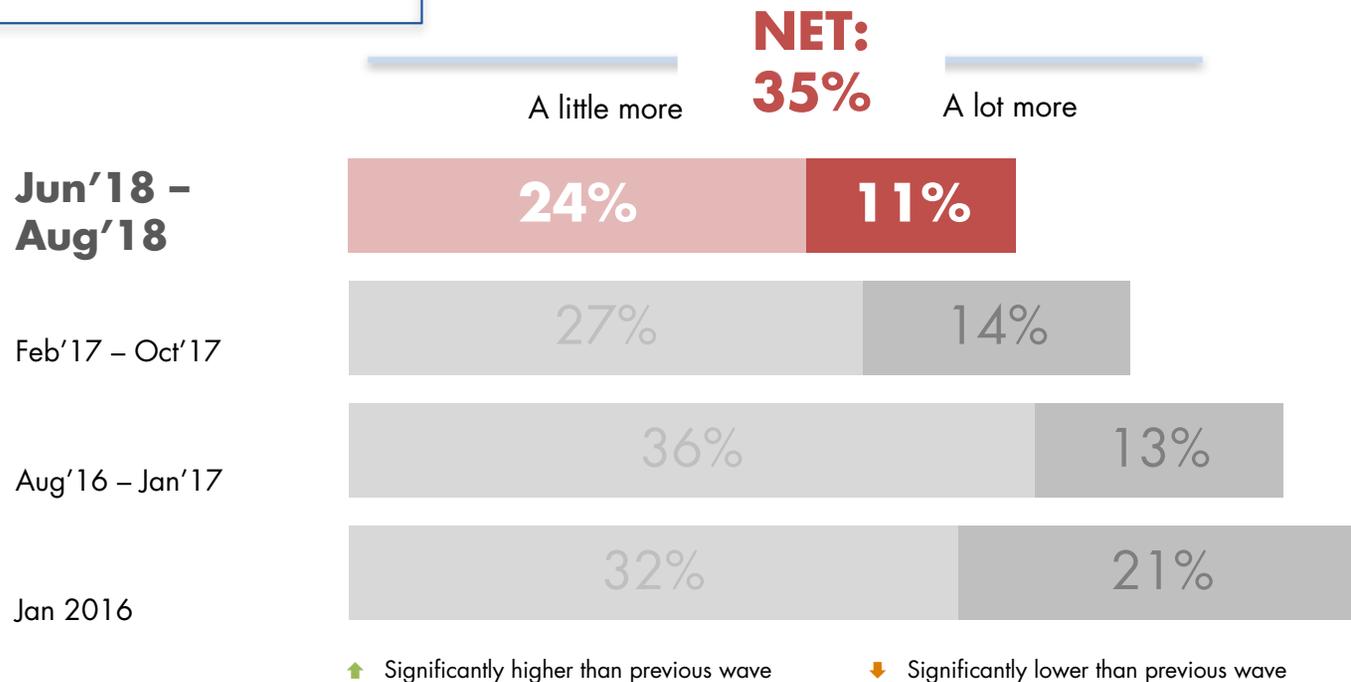
# What's more, fewer say TVE availability makes them feel they get more value from their MVPD subscription

**Age 18-64: MVPD SUBS**  
 % who perceive more value for the money  
**Your MVPD**



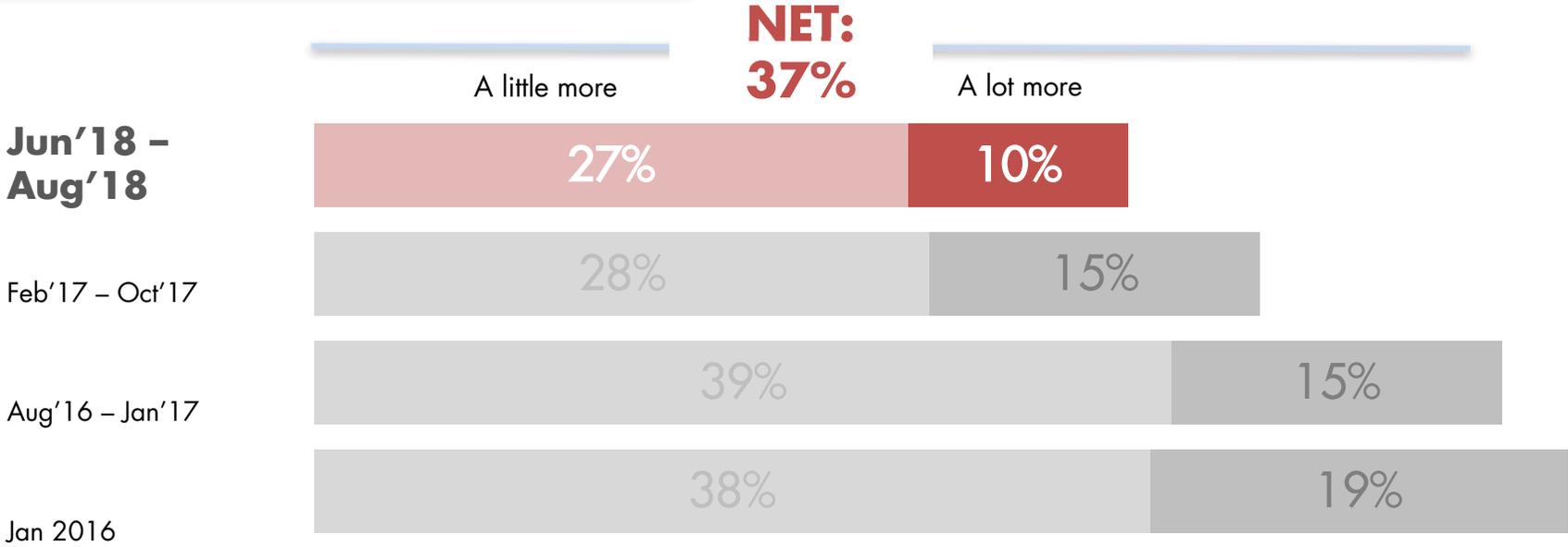
The story for cable is similar: compared to when IVE was newer, customers are less likely to say TVE availability makes them feel more positive about their cable subscription

**Age 18-64: CABLE SUBS**  
 % more positive about...  
**YOUR CABLE PROVIDER**



We also see a drop among cable subs in the proportion saying TVE makes them feel they get more value for the money from their cable service

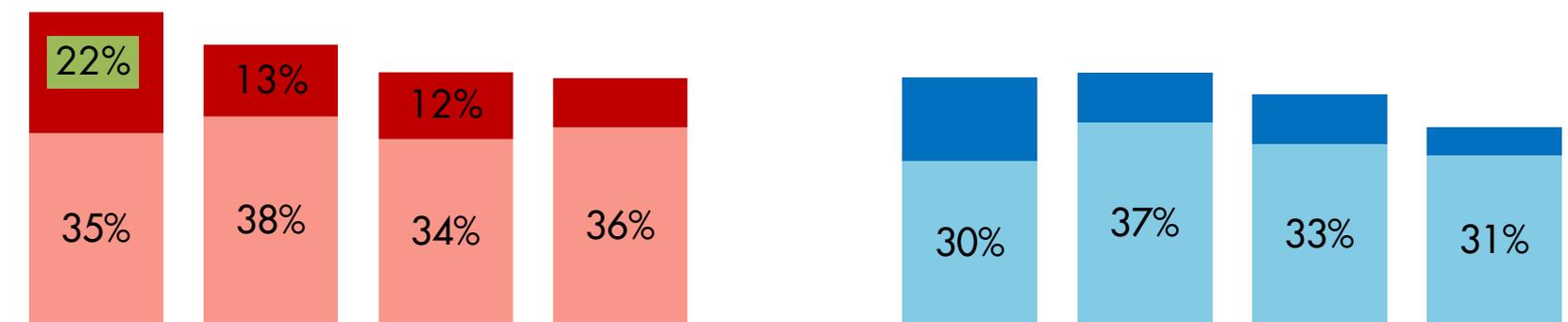
**Age 18-64: CABLE SUBS**  
 % who perceive more value for the money  
**YOUR CABLE PROVIDER**



↑ Significantly higher than previous wave      ↓ Significantly lower than previous wave

As in past waves, the heaviest TVE users are still the most likely to say TVE availability makes their service an excellent value for the money

## PERCEIVED VALUE OF SERVICE FROM MVPD/CABLE PROVIDER



Significantly higher than total      Significantly lower than total



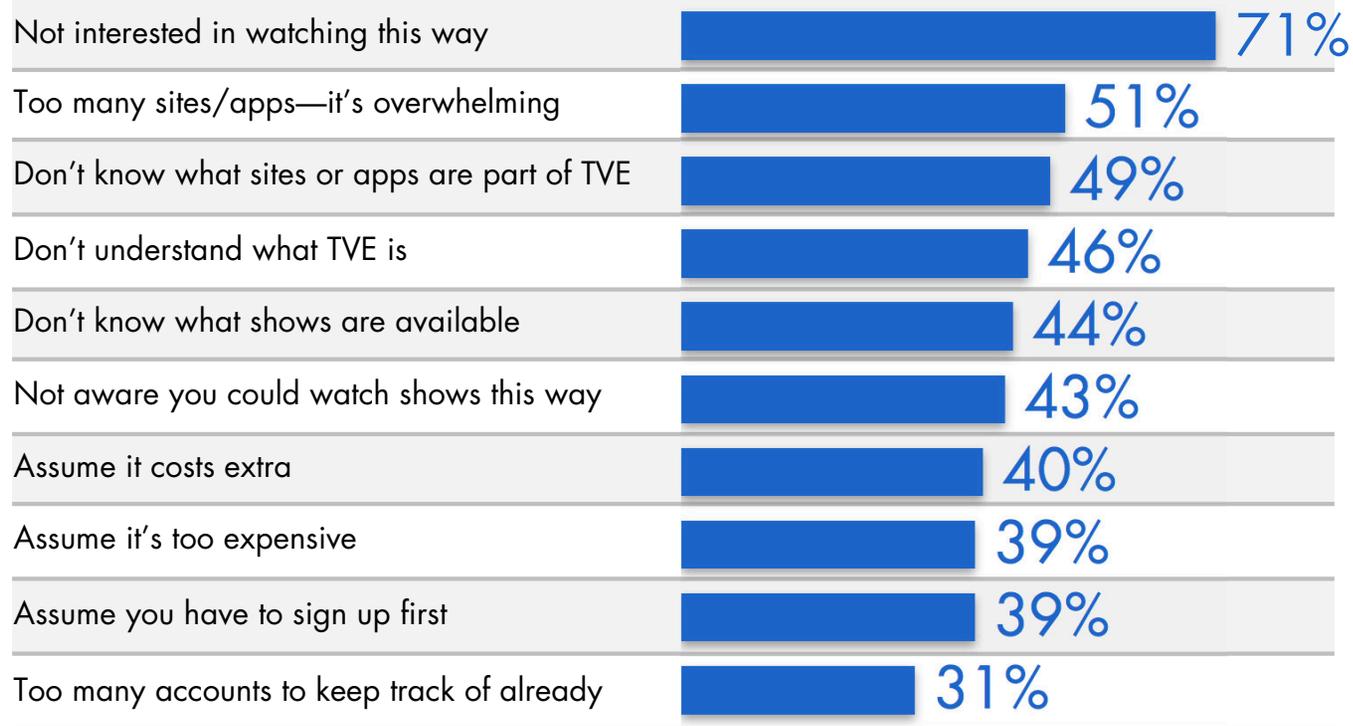
! " ##\$% #&

The factors that inhibit TVE adoption  
and use

“No interest” remains by far the number one reason for never using TVE, statistically unchanged from last year; however, “don’t understand” TVE is down a directional 7 points

### CABLE SUBS 18-64, NEVER USED TVE

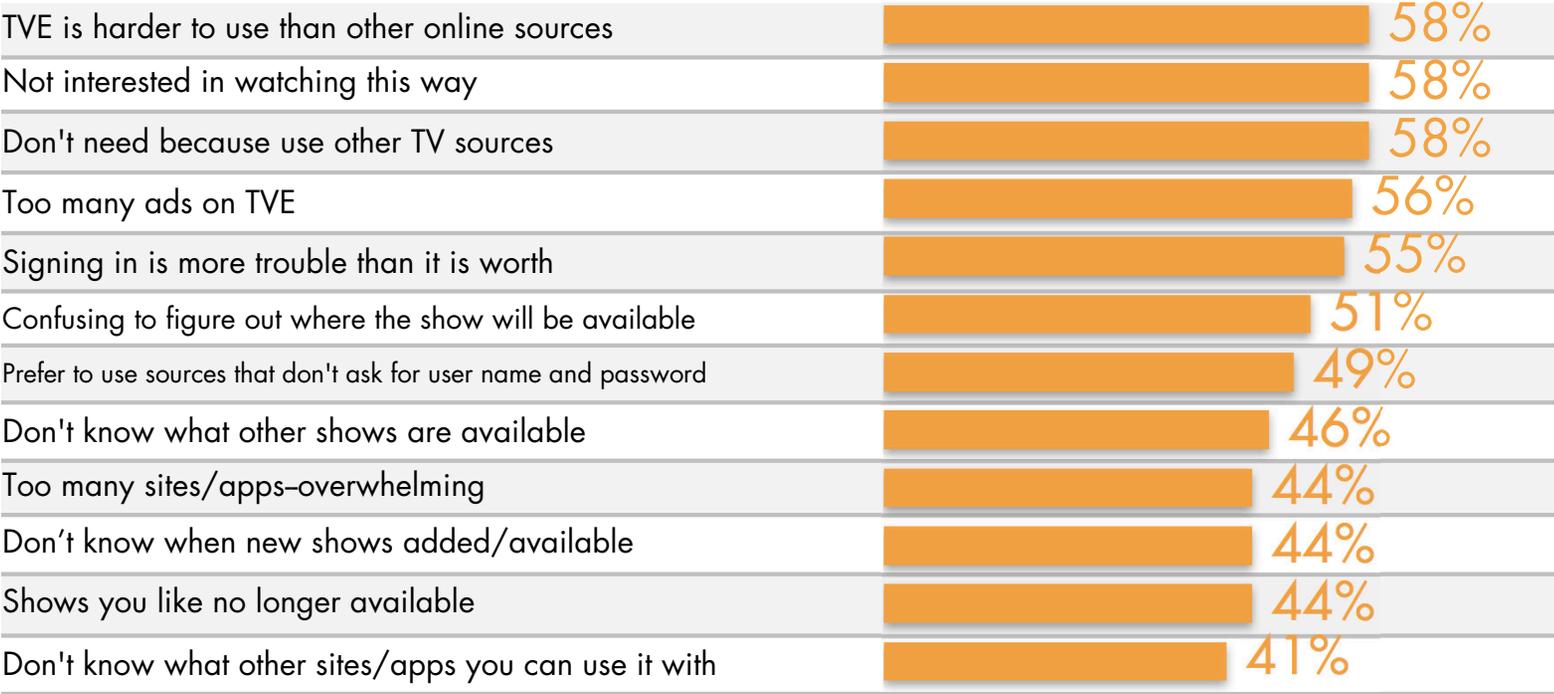
% citing each as major/minor reason for NOT USING (TOP REASONS)



Five reasons cluster toward the top for cutting down on TVE use, with use difficulty, non-interest, and lack of need tied for number one

**CABLE SUBS 18-64, CURRENTLY USE TVE LESS**

% citing each as major/minor reason for CUTTING DOWN on TVE (TOP REASONS)



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## CABLE SUBS 18-64, CURRENTLY USE TVE, HAVE NOT CUT DOWN

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9 \$ ( 6 & 7 ( \$ - & - 0 . % \$ 8 ) * & + % ) + ? . E E + & 2 \$ 5 & / . ( & 5 + )	4 1 P

As in 2017, older non-TVE users are directionally more likely to cite lack of interest; younger subs are more likely to assume it costs extra or say they have too many accounts

### CABLE SUBS 18-64, NEVER USED TVE

% citing each as major/minor reason for NOT USING (TOP REASONS)

	18-64	18-34	35-64
Not interested in watching this way	71%	61%	76%
Don't know what sites or apps are part of TVE	49%	51%	48%
Don't understand what TVE is	46%	52%	44%
Assume it costs extra	40%	49%	36%
Too many accounts to keep track of already	31%	41%	27%
You prefer sources that don't ask for user name and password	43%	37%	46%
You assume it would be expensive to use	39%	47%	35%
Not aware you could watch shows this way	43%	56%	37%
Don't know what shows are available	44%	47%	43%
Assume you have to sign up first	39%	38%	39%

For cable subs who have cut down, older consumers are more likely to blame too many TVE sites and apps, while younger consumers are more likely to cite lack of interest

### **CABLE SUBS 18-64, CURRENTLY USE TVE LESS**

% citing each as major/minor reason for CUTTING DOWN on TVE (TOP REASONS)

	<b>18-64</b>	<b>18-34</b>	<b>35-64</b>
Too many sites/apps—overwhelming	44%	21%	50%
TVE is harder to use than other online sources	58%	56%	58%
Not interested in watching this way	58%	66%	56%
Prefer sources that don't ask for a user name or password	49%	43%	51%
Signing in was more trouble than it's worth	55%	43%	58%
Don't need—use other online sources	58%	50%	60%
Too many ads when I watch through TV Everywhere	56%	54%	56%
Don't know when other shows are available	46%	30%	50%
Don't know when new shows added/available	44%	41%	45%
Don't know what other sites or apps you can use it with	41%	29%	44%

Y3.56\*7':;<'.,\*7,'4 23 '2+\*= 'Q\*?'-:;<'.,\*',+T)\*',+8'-2\*8'935M'.,\*'/'-> 37\*' T\*1+.,\*'-2\*8M\* '53-'/'5-\*7\*,\*9 '37'?7\*0\*7'535# .-2\*5-'1+\*9',3.71\*,

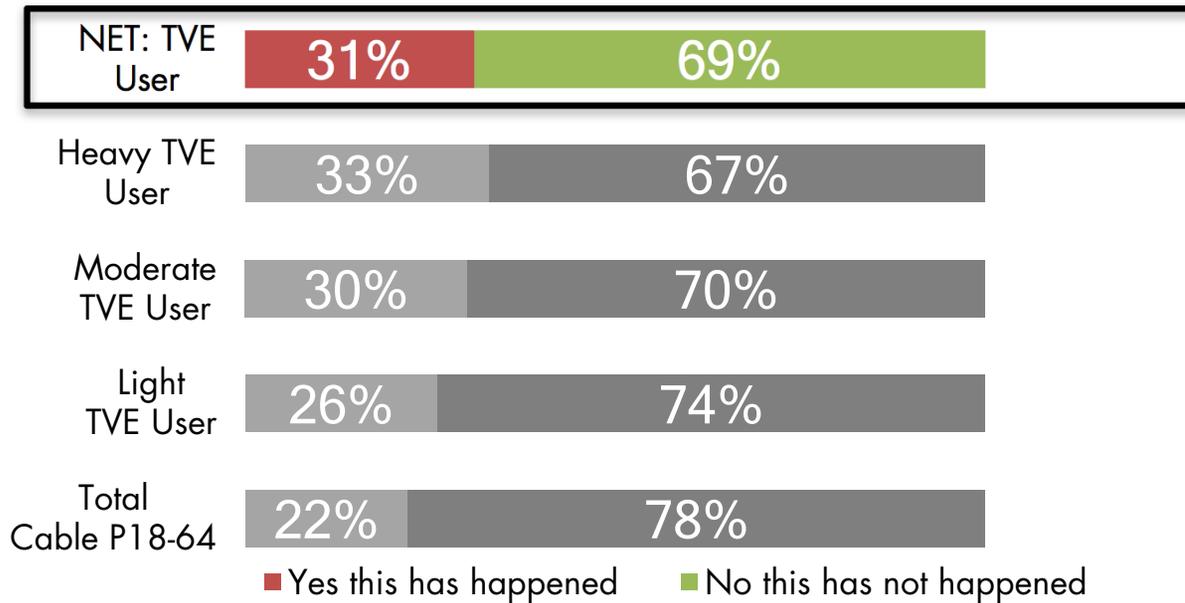
## CABLE SUBS 18-64, CURRENTLY USE TVE, HAVE NOT CUT DOWN

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	18-64	18-34	35-64
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L35M'5**9N .,*'3-2*7'35)'5*','3.71*,	OP@	!P@	O!@
(7*0*7',3.71*,'-2+-'935M'+,Q'0B7'36/5	!R@	!P@	OS@
:33 > +58'49,	OP@	!!@	O!@
L35M'Q534 '4 2*5'5*4 ',234 ,'+99*9B+=+/'+T)*	O!@	!U@	OO@
V 350.,/56 '4 2*2*7'-3'.,*'C ; (LW5*4 37QW37T3-2	O!@	O\$@	O!@
L35M'Q534 '4 2+-'3-2*7',234 ,'+7*'4+=+/'+T)*	OK@	!U@	OR@
H/65/56 '5'4 +, > 37*'73.T)*'-2+5'/x,'4 372	OK@	OS@	O"@
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L35M'Q534 '4 2+-'3-2*7',/*,B+??,'83.'1+5'.,*	OU@	OP@	OR@

31% of cable subscribers who use TVE say they've had a situation where they needed to enter credentials more than once—although that's down directionally from 36% last year

## Age 18-64: CABLE SUBS



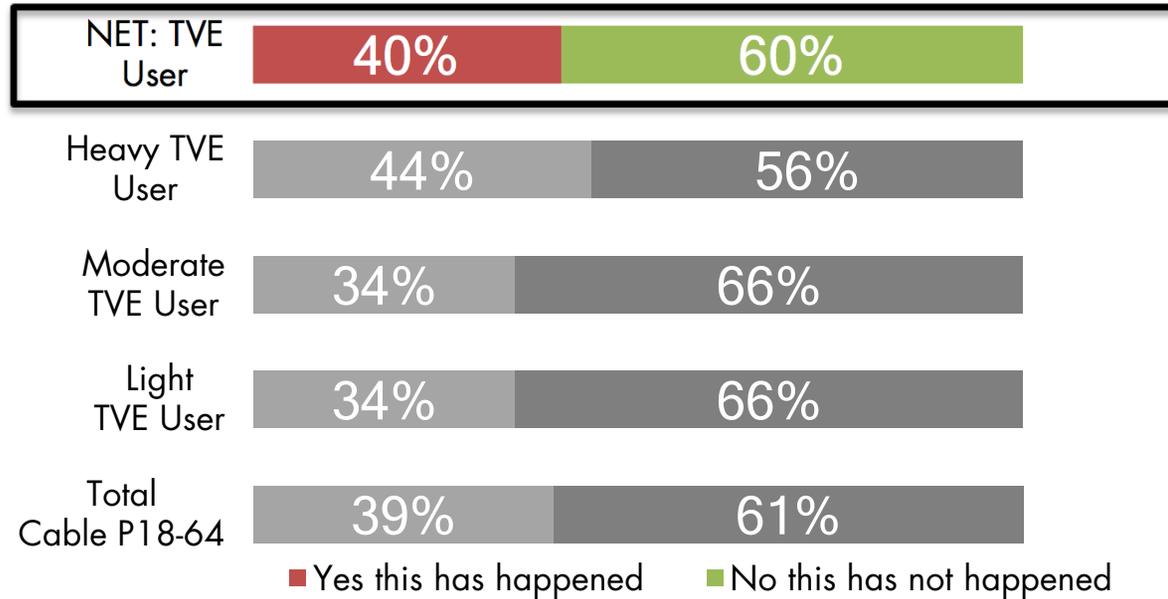
↑ Significantly higher than other segment

↓ Significantly lower than other segment

However, among those who HAVE had a situation where they needed to re-enter login info, 4 in 10 say it caused them to stop using the site or app, up directionally from last year

## Age 18-64: CABLE SUBS

Had entered username/password more than once

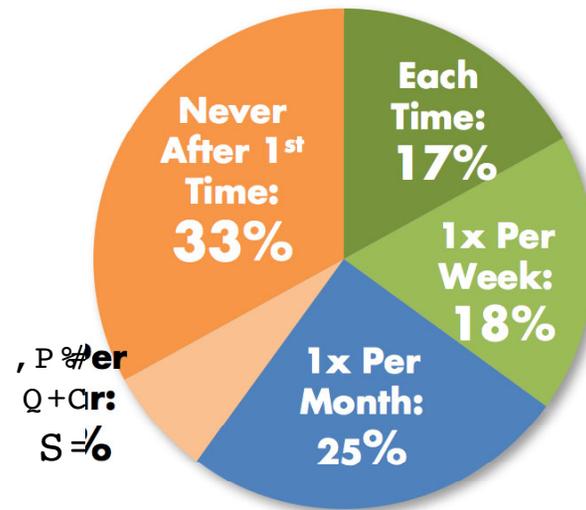
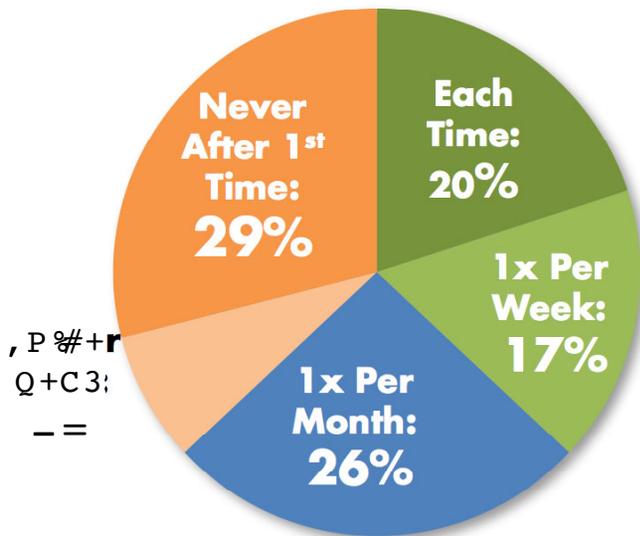


Perceptions of what's reasonable when it comes to how often one should have to sign in for TVE are nearly identical to last year: the highest proportion say "just once"

A BC5D6%E+C6FGCHH%&8\*G.8G%J3+KL+GMNO

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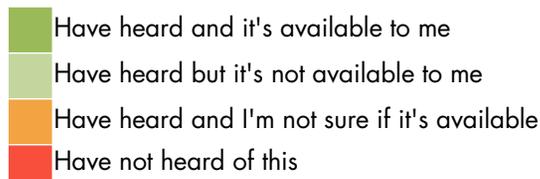
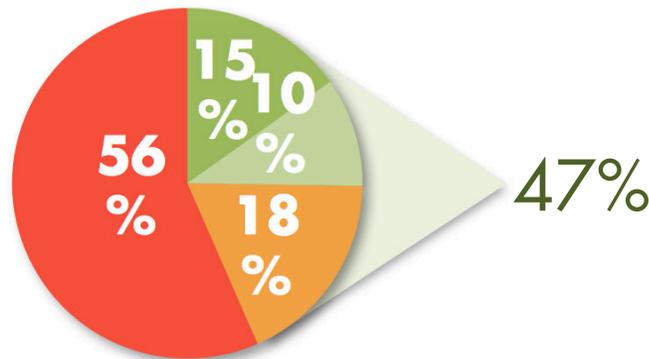
# **AUTO SIGN IN**

Awareness and Impact

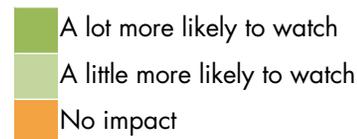
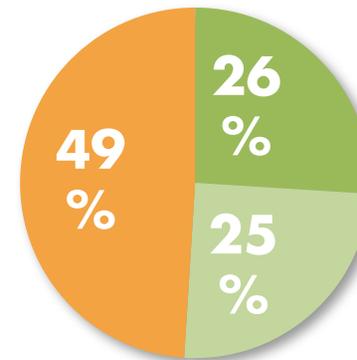
The percent of cable subscribers aware of home-based automatic sign-in is identical to 2017; the proportions saying it makes them more likely to watch are down directionally

## HOME-BASED AUTOMATIC SIGN-IN CABLE SUBS (18-64)

### AWARENESS



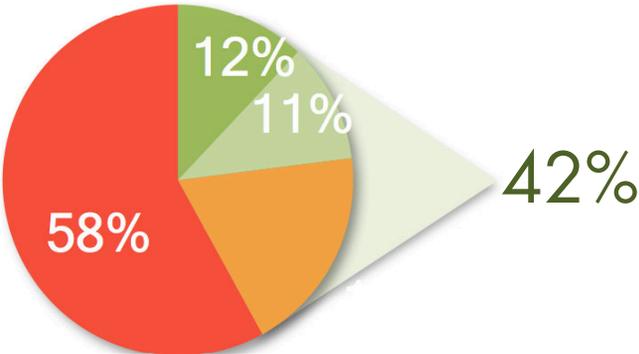
### LIKELIHOOD TO WATCH



Out-of-home single sign-in awareness is also statistically the same as in 2017, with impact on viewing likelihood also similar to last year

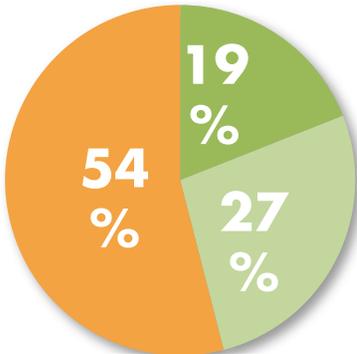
### OUT-OF-HOME SINGLE SIGN-IN CABLE SUBS (18-64)

#### AWARENESS



- Have heard and it's available to me
- Have heard but it's not available to me
- Have heard and I'm not sure if it's available
- Have not heard of this

#### LIKELIHOOD TO WATCH



- A lot more likely to watch
- A little more likely to watch
- No impact



## **PATH TO VIEWING**

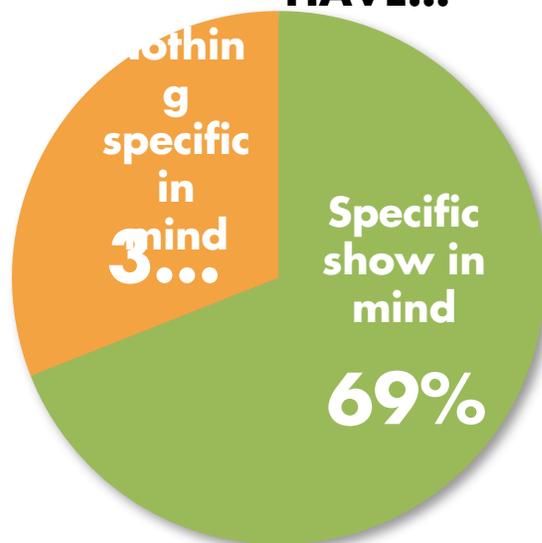
In General, and for Most Recent TVE Experience

Among MVPD subscribers, the percent saying they use TVE when they have specific content in mind is nearly identical to 2017: 69%

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## MVPD SUBS (18-64)

**WHEN YOU USE TVE, WHAT PERCENT OF THE TIME DO YOU HAVE...**



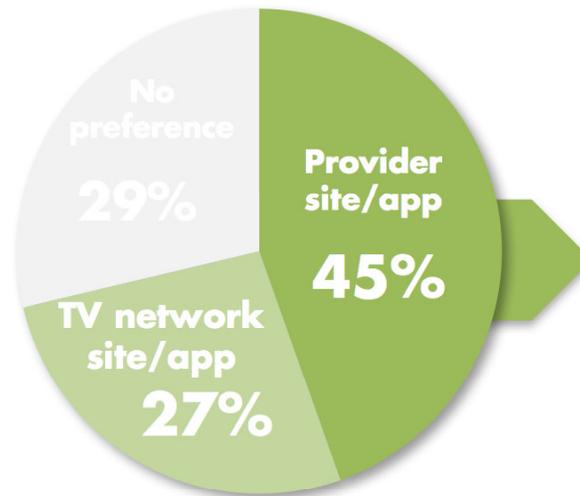
The path to viewing when one has a specific show is also nearly identical to last year: most opt for the provider app, and most navigate by entering the show name in the search field

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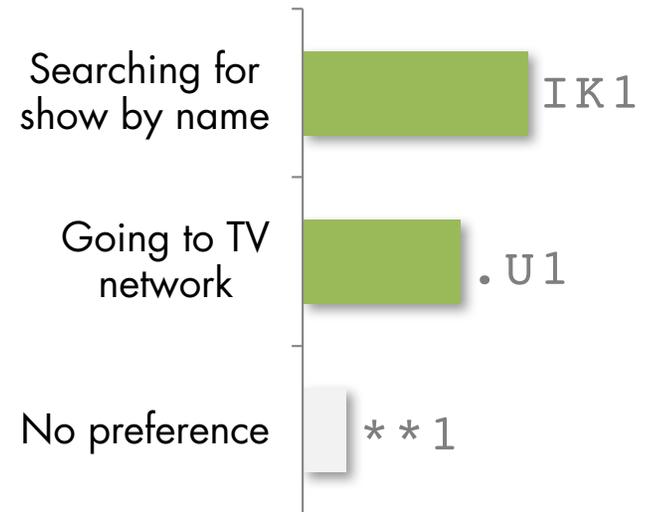
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Q5F 5Q7 98 8 98 :



6 V " RT V 95% ( 7 :

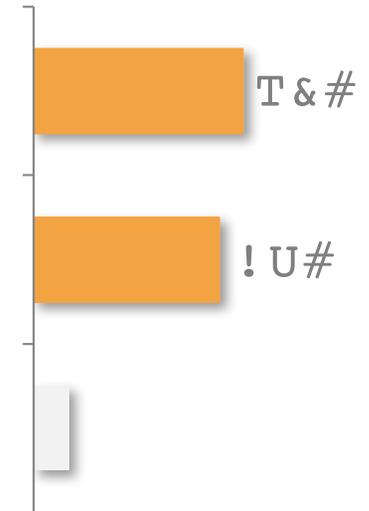
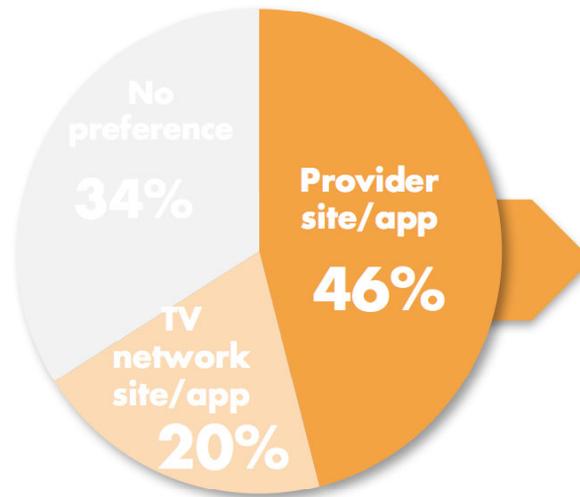


Without a specific show in mind, the lion's share of MVPD subs still go to an MVPD TVE source; after that, a slight majority say they browse generally (vs. go to a specific network)

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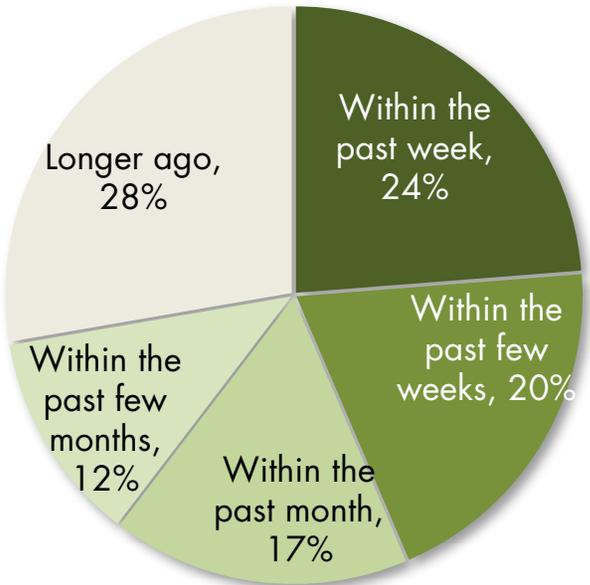
5 6 7 8 +9 : - +, 7+; ( 7<

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44% of MVPD TVE users say they used the capability to watch a show within the past few weeks (directionally lower than 48% in 2017)

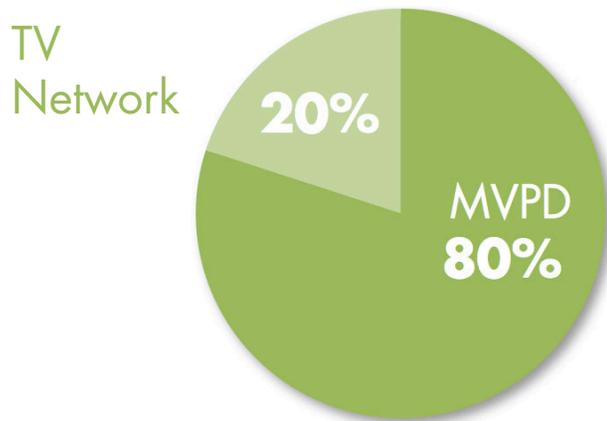
**LAST TIME WATCHED A SHOW ON TVE WAS...  
MVPD SUBS (18-64)**



For that most recent IVE attempt, the vast majority opted for an MVPD site/app, 43% saw the MVPD picker (similar to 2017), and 86% successfully signed on (identical to last year)

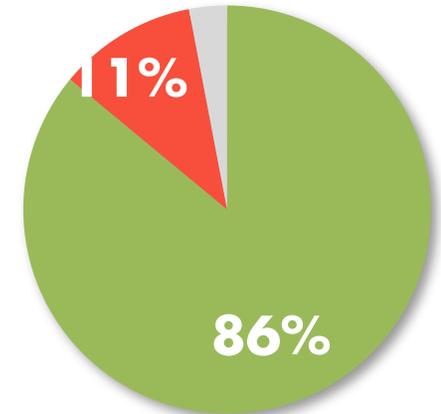
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### USED WEBSITE OR APP FROM...



### WERE YOU ABLE TO LOG IN?

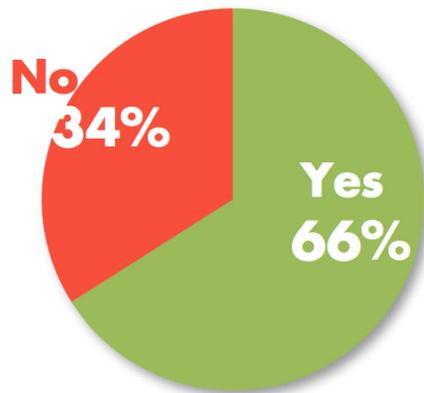
Those who go to screen



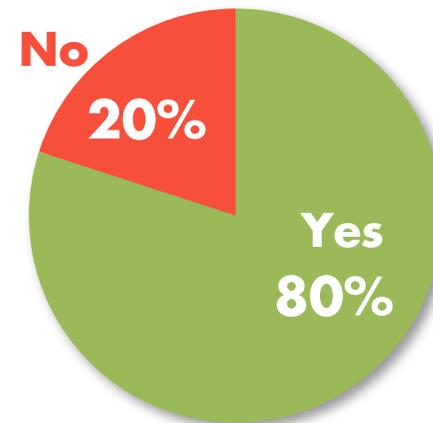
Similar to how people use TV generally, two-thirds were looking for a specific show during the most recent experience; 8 in 10 successfully found something to watch (78% in 2017)

## **MOST RECENT TIME USING TVE MVPD SUBS (18-64)**

**WERE YOU LOOKING FOR A  
SPECIFIC SHOW?**



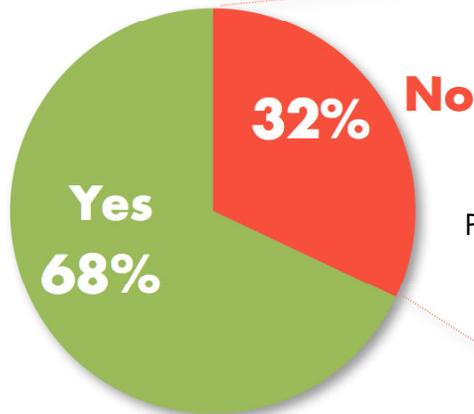
**WERE YOU ABLE TO FIND THE  
SHOW/A SHOW?**



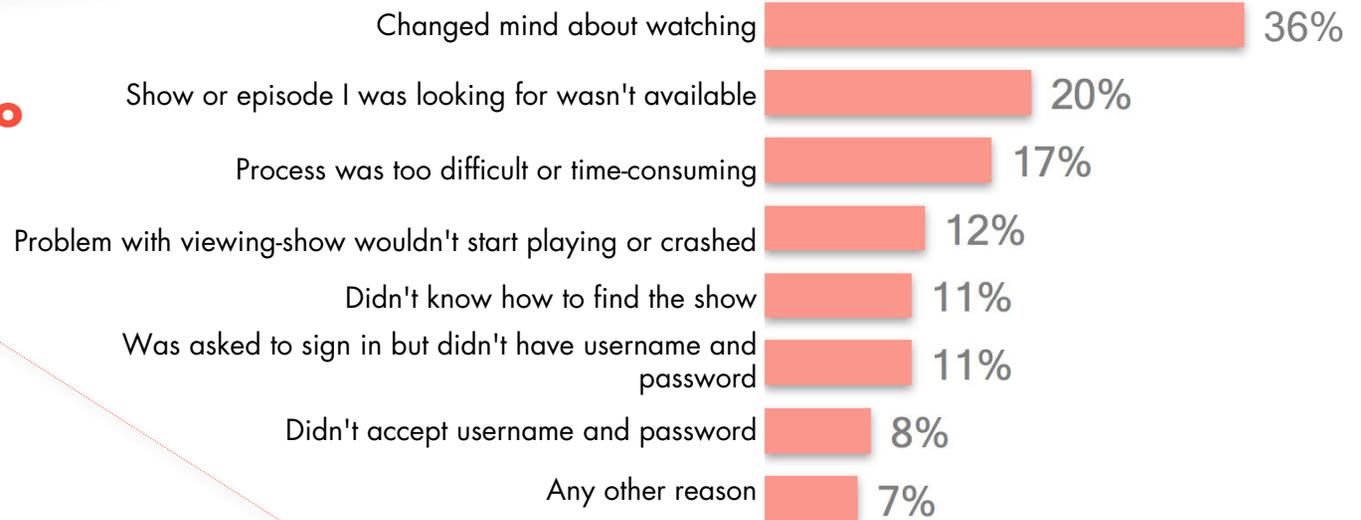
Two-thirds ended up watching content via IVE (no change from last year); among those who didn't, the most common reason was that they changed their mind about viewing

## USING TVE MVPD SUBS (18-64)

### DID YOU END UP WATCHING VIA TVE?

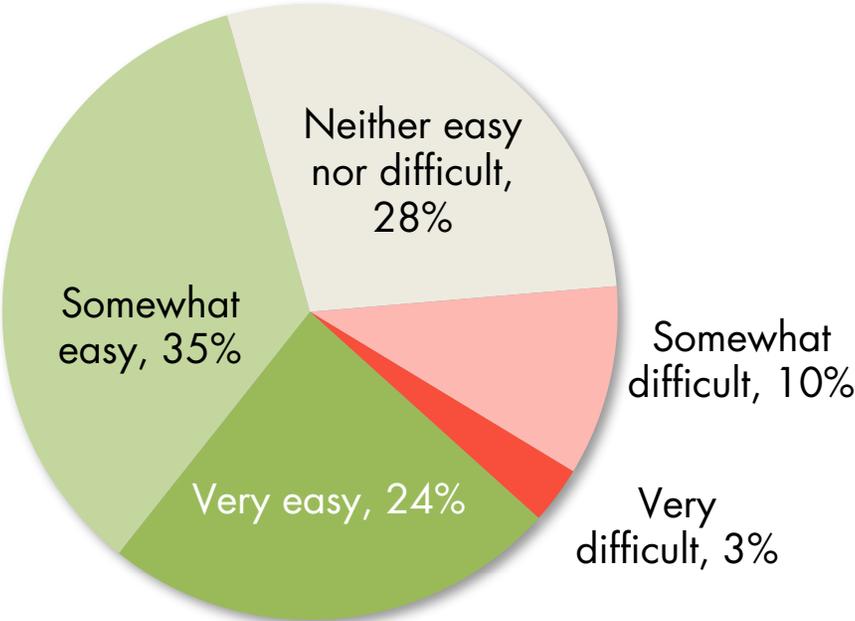


### WHY NOT? (AMONG THOSE WHO DID NOT WATCH)



All in all, 59% rated their most recent TVE experience as either very or somewhat easy, statistically equivalent to the 61% last year

**THE PROCESS OF USING TVE WAS...**  
**MVPD SUBS (18-64)**



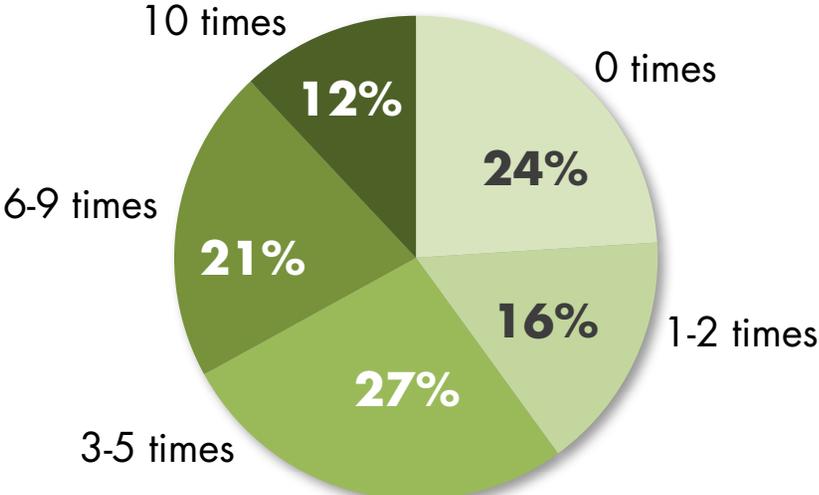


## **TVE Occasions**

Linear, sports, and viewing situations

For 4.1 of the 10 most recent TVE experiences among MVPD subs, content was watched live: nearly identical to 2017

**# OF TIMES STREAMING LIVE  
(OUT OF LAST 10 TIMES USING TVE)  
TVE USERS - MVPD SUBS (18-64)**



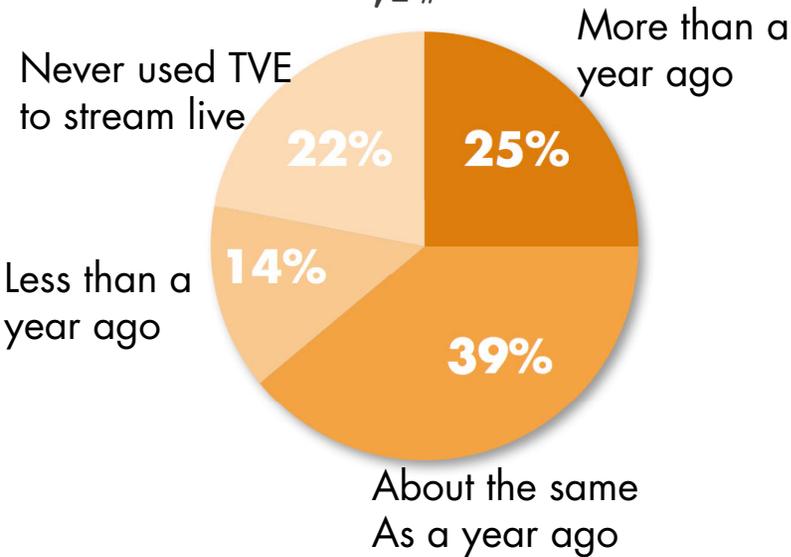
Mean # times streaming live (out of 10)	<b>4.1</b>
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Mean # times streaming live (out of 10), excluding 0's	<b>5.4</b>
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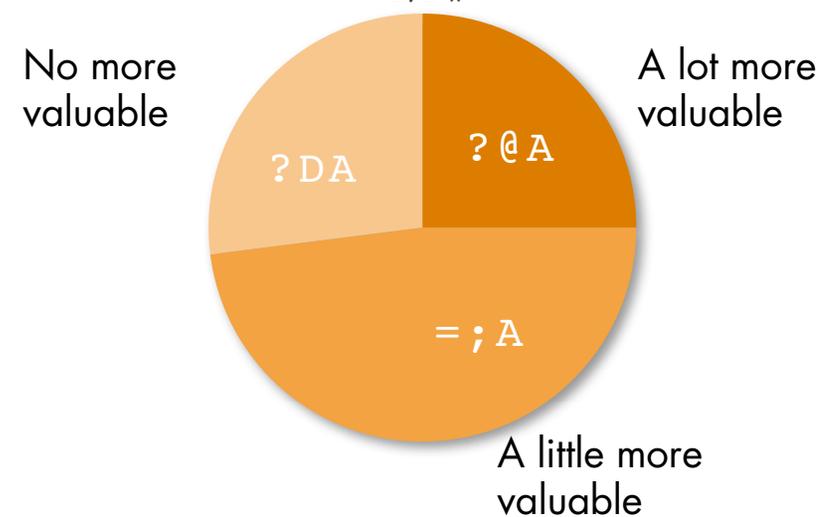
1 in 4 TVE users say they use TVE for live viewing more than a year ago, although 4 in 10 say that hasn't changed; 1 in 4 also say live viewing makes TVE a lot more valuable

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# **PERMISSABLE SHARING**

Consumer Habits and Understanding

The incidence of TVE credential sharing has remained identical to 2017, with 18-34 year olds more likely to have given out their login information

## WAYS OF SHARING LOGIN INFORMATION WITH OTHERS

### TVE USERS, MVPD SUBS (18-64)

Gave login information to...		18-34	35-49	50-64
A family member living somewhere else temporarily	 <b>17%</b>	<b>30%↑</b>	<b>17%</b>	<b>10%</b>
A family member living somewhere else permanently	 <b>16%</b>	<b>31%↑</b>	<b>16%</b>	<b>8%</b>
A friend of a family member	 <b>15%</b>	<b>28%↑</b>	<b>16%</b>	<b>7%</b>
A friend	 <b>12%</b>	<b>28%↑</b>	<b>14%</b>	<b>2%</b>
Household member gave login information to a friend	 <b>12%</b>	<b>29%↑</b>	<b>13%</b>	<b>2%</b>

↑ Significantly higher than total

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A family member living somewhere else permanently



**12%**

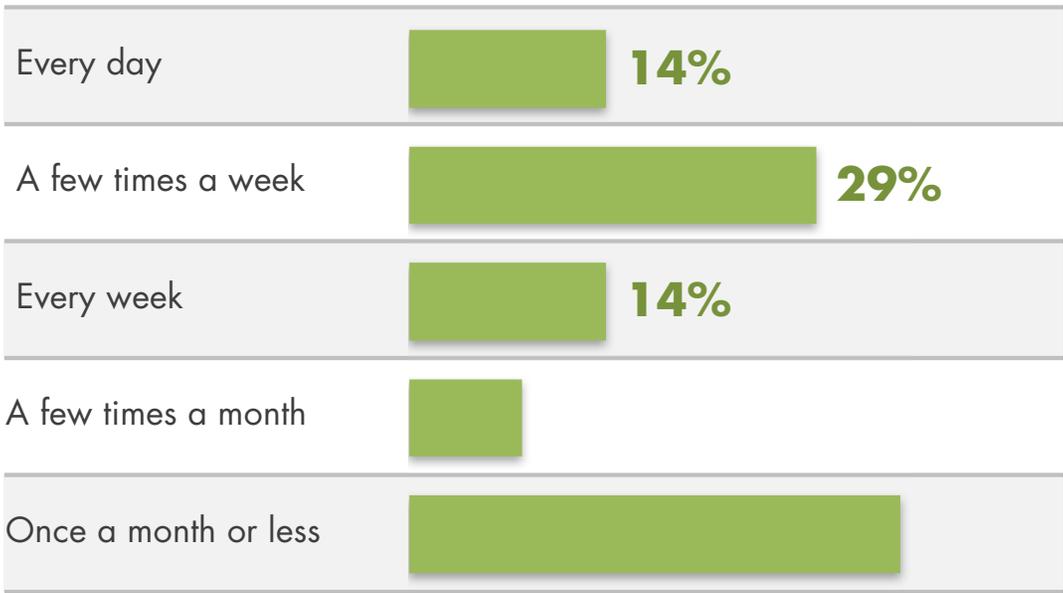
A friend



**10%**

A friend of a family member





The proportions who have given their Netflix credentials to others are not appreciably different from the proportions who have given out their TVE login information

## SHARING OF NETFLIX LOGIN INFORMATION WITH OTHERS

### NETFLIX SUBSCRIBERS WHO ARE MVPD SUBS (18-64)

Have given my Netflix login information to ...		18-34	35-49	50-64
A family member living somewhere else permanently	 <b>18%</b>	<b>27%</b>	<b>14%</b>	<b>14%</b>
A family member living somewhere else temporarily	 <b>18%</b>	<b>26%</b>	<b>16%</b>	<b>12%</b>
A friend	 <b>14%</b>	<b>28%</b>	<b>12%</b>	<b>3%</b>
A friend of a family member	 <b>12%</b>	<b>19%</b>	<b>10%</b>	<b>6%</b>

Only 27% of TVE users say they have a very clear idea of what is and isn't permissible when it comes to TVE password sharing, the same percentage we saw in 2017

## CLARITY OF PROVIDER TERMS FOR PASSWORD SHARING

### TVE USERS, MVPD SUBS (18-64)

I have ... of when it is or is not permitted for someone else to use my login information		18-34	35-49	50-64
A very clear idea	 <b>27%</b>	35%	27%	23%
A somewhat clear idea	 <b>34%</b>	40%	37%	29%
A not very clear idea	 <b>17%</b>	12%	16%	21%
No idea at all	 <b>22%</b>	13%	20%	27%

# Levels of uncertainty about concurrent streams have increased since 2017: two-thirds don't know if it's allowed at all; half of those who think it is don't know how many are allowed

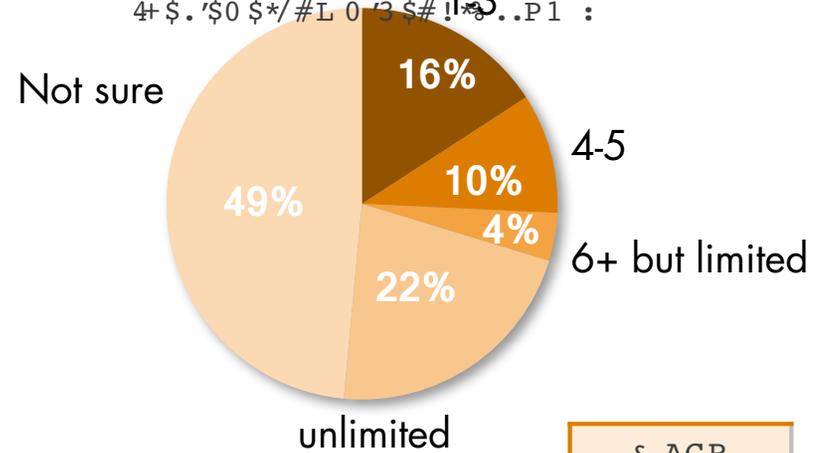
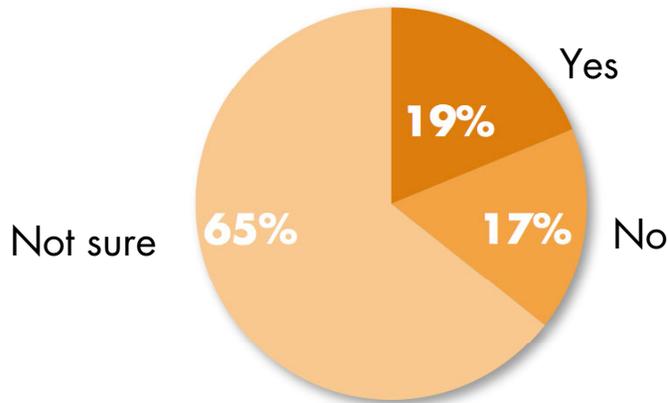
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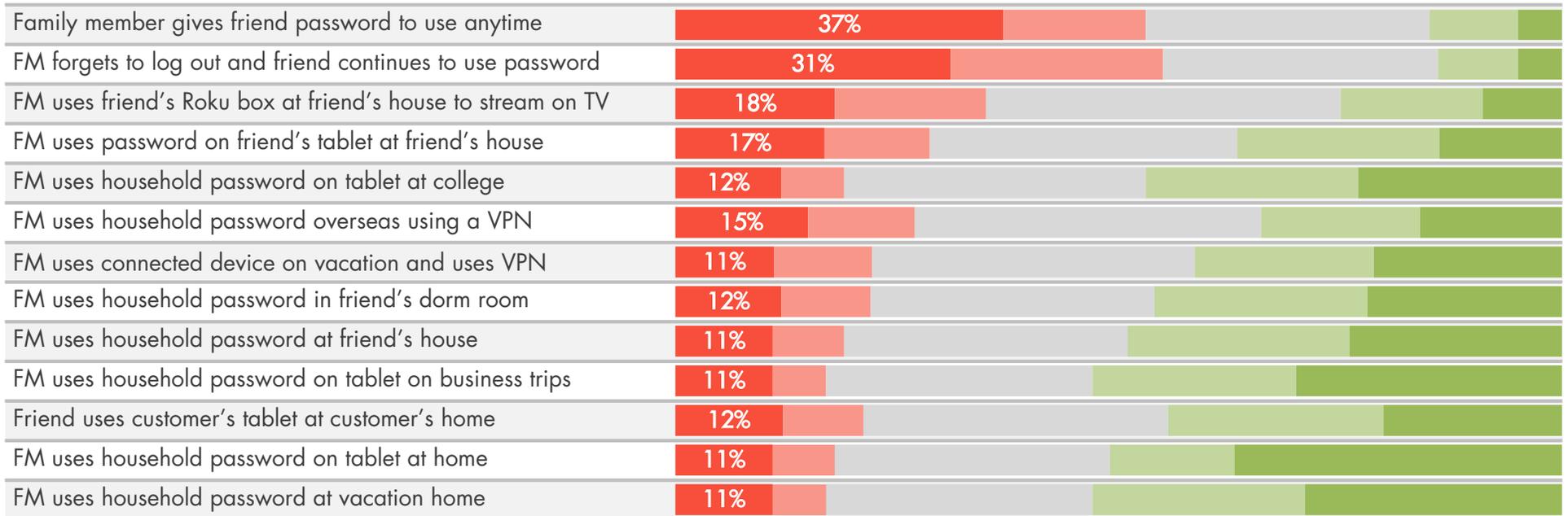
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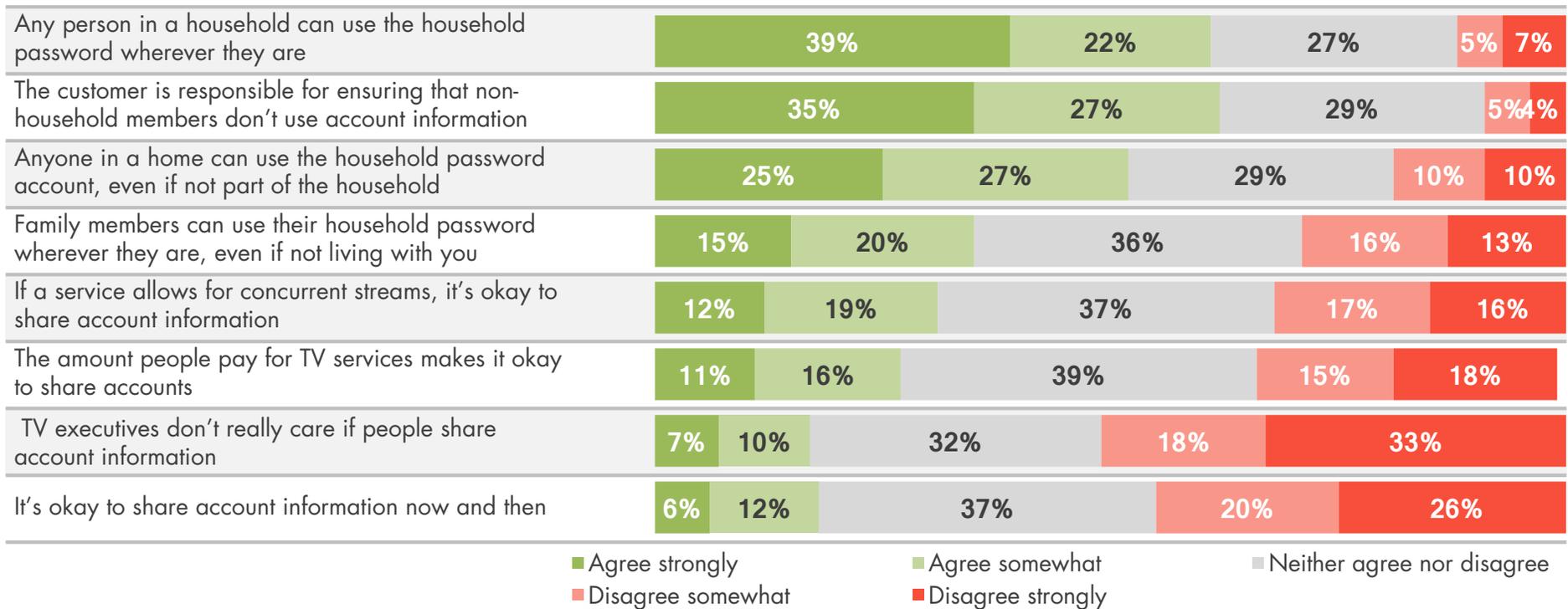
& A C B
9 K 5



MVPD subs are most likely to agree that anyone in a household can use credentials even outside the home, and that they themselves are responsible for preventing login abuse

## ATTITUDES TOWARD SHARING PASSWORDS FOR ONLINE TV ACCESS

### MVPD SUBS (18-64)



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## PASSWORD SHARING PERMISSION BY SERVICE TYPE

### MVPD SUBS (18-64)

