



## CTAM TVE TRACKING: 2018 HIGHLIGHTS

Primary measures holding vs. last year, with expected decline in positive perception

### Age 18-64: CABLE SUBS

#### 1. TVE AWARENESS:

	July 2015	January 2016	Aug '16 – Jan '17	Feb '17 – Oct '17	June '18 – Aug '18
Aided (after concept described): Top Box	57%	47%	42%	42%	40%
Aided (after concept described): Top-2 Box	82%	72%	73%	69%	72%

#### 2. USE OF TVE:

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%

#### 3. TVE IMPACT:

##### Impact on perceptions and value of cable company

NET: More positive perception	51%	53%	49%	41%	35%
NET: More value for the money	56%	57%	54%	43%	38%

Awareness among Cable Sub is statistically identical to 2017, while Use in Past 6 Months has dropped (but remains higher than 2016 levels). Use among Heavy TVE Users is unchanged.

About one-third of TVE users say they're using it **more** than a year ago. A18-34 Cable Subs are heavier users of TVE from any source than A35-64, while A35-49 experienced an increase in use vs. 2017. Hispanic and African-American subs continue to be heavier users of TVE, although both experienced dips in use since 2017.

### Search starts with the show, path to viewing is clearer, and successful sign-ins are high

TVE's sweet spot is catch-up viewing, private viewing, and situations where a "main TV" isn't available. 69% of MVPD subs have a specific show in mind when they use TVE (nearly identical to 2017), and most opt for the provider app to search for it. 46% of those without a show in mind go to the MVPD TVE source. 6 in 10 SVOD subscribers (Netflix, Hulu, Amazon) say they would watch more OTT if TVE didn't exist.

Nearly 6 in 10 rated their most recent TVE experience as either very or somewhat easy (statistically equivalent to last year). Awareness of home-based automatic sign-in (47%) is identical to 2017, as is out-of-home single sign-in awareness (42%). 1 in 4 TVE users say they use TVE for live viewing more than a year ago – and that live viewing makes TVE a lot more valuable.

Levels of successful sign in, viewing and satisfaction remain high. When viewers don't watch, it's usually because they changed their minds.

### Credential "sharing" continues apace, and is a grey area for most users

Incidence of TVE credential sharing is identical to 2017, and A18-34 are more likely to report giving out their login information (28-31%, depending on circumstance tested). Incidence of using someone else's credentials has also not changed since 2017 (9-12%). Only 27% of MVPD TVE users have "a very clear idea" of when it is permissible for someone else to use their password for TVE viewing.