



CTAM

TVE TRACKING: MARCH 2017 RESULTS



Wave 6: We surveyed 3,513 MVPD subscribers on a continuous basis, from August 2016 to January 2017

- 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)

Non-users:	784
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Light TVE Users (once per month or less)	457
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Moderate TVE Users (weekly or several times per month)	851
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Heavy TVE Users (daily or several times per week)	1,421
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*** DEFINITION OF TVE USERS:**

Authenticate using the site or app of a network or an MVPD. People who use a site/app without authenticating, or one from an online provider, aren't included

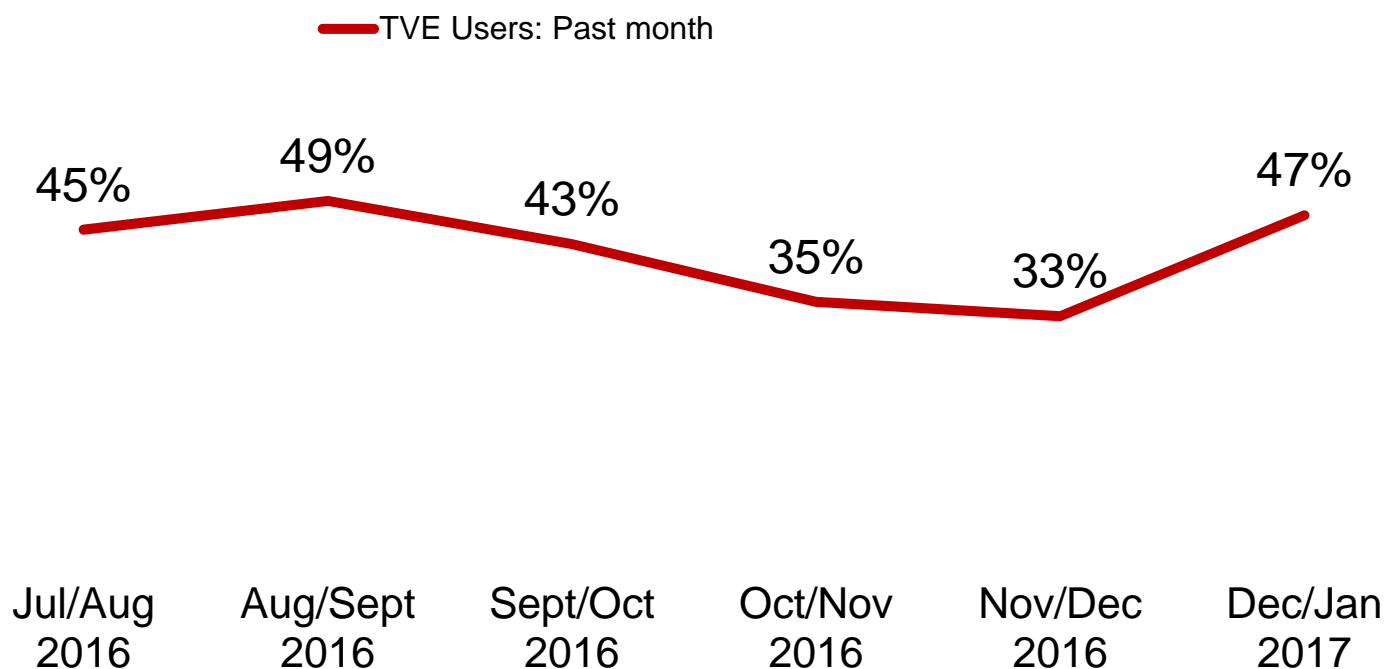


Usage

How many people are using TVE,
and how often

Past-month TVE use tends to fluctuate—in this past wave, it peaked around the time of the 2016 Olympics

Age 18-64: MVPD SUBS, by Past-Month Viewing Period TVE Use



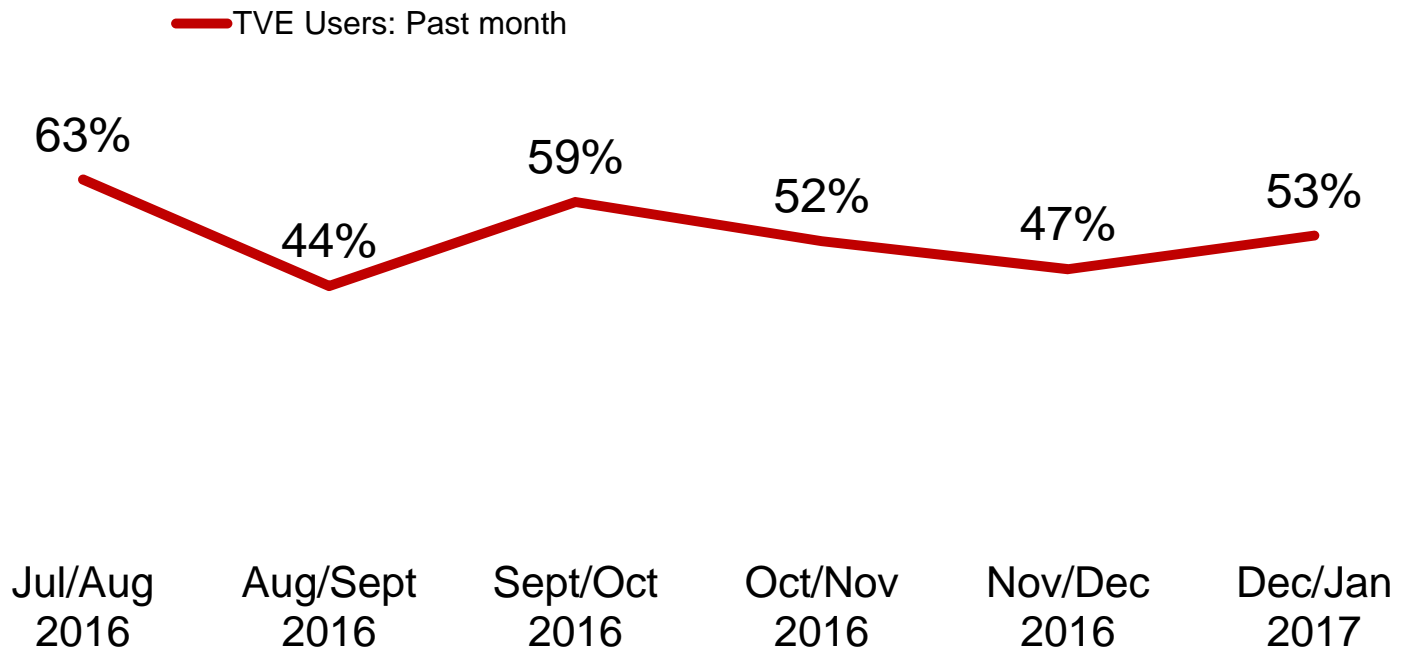
↑ Significantly higher than previous month(s)

↓ Significantly lower than previous month(s)

When we look at younger MVPD subs, we also see highest levels of past-month TVE use around the time of the Olympics

Age 18-34: MVPD SUBS, by Past-Month Viewing Period

TVE Use



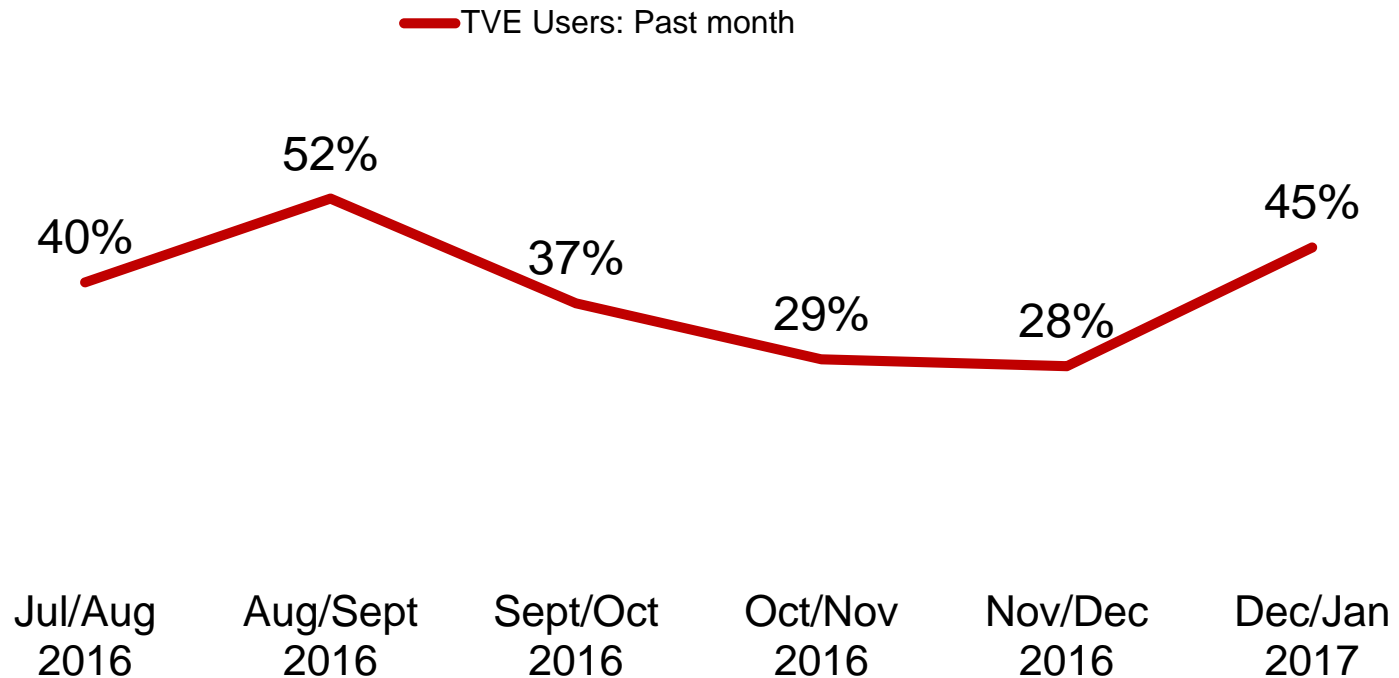
↑ Significantly higher than previous month(s)

↓ Significantly lower than previous month(s)

Older MVPD subs show more variation in use, dipping during the holiday period after a post-Olympic high

Age 35-64: MVPD SUBS, by Past-Month Viewing Period

TVE Use



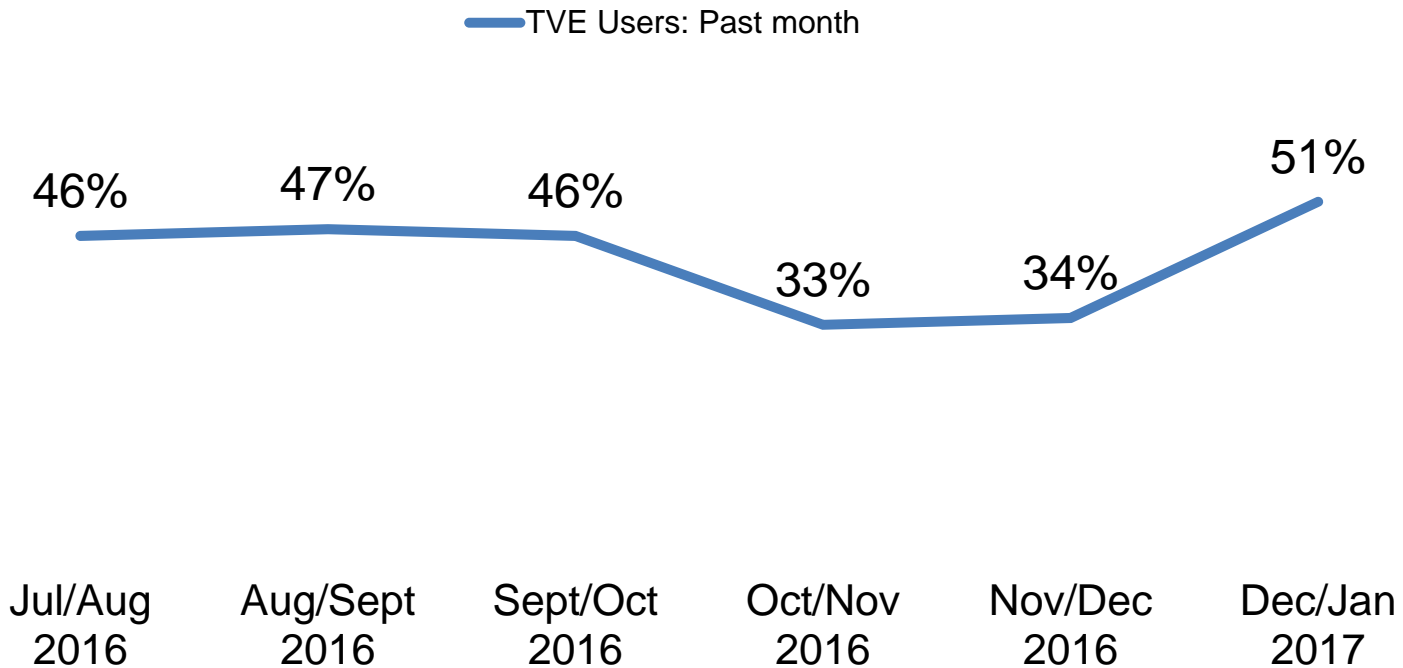
↑ Significantly higher than previous month(s)

↓ Significantly lower than previous month(s)

Among cable subs, TVE use was highest this past January, after dipping during the holiday season

Age 18-64: CABLE SUBS, by Past-Month Viewing Period

TVE Use



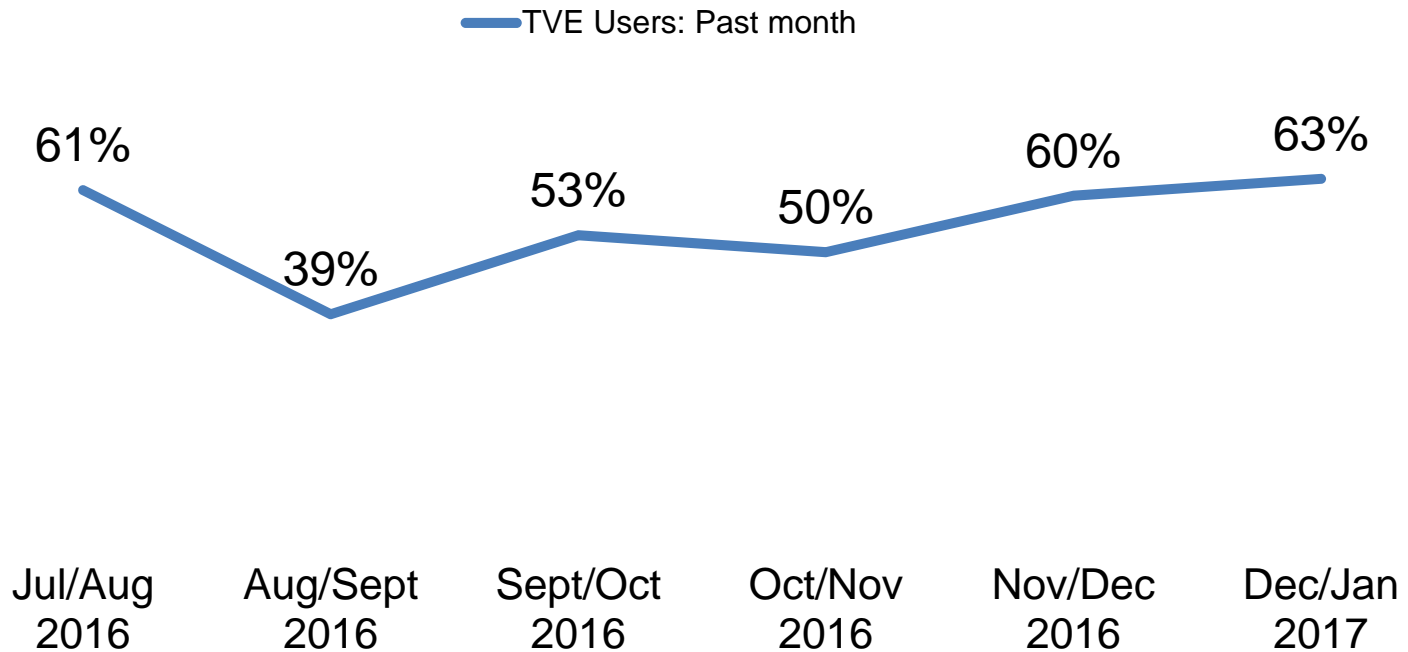
↑ Significantly higher than previous month(s)

↓ Significantly lower than previous month(s)

Young cable subs show more variation than young MVPD subs, with use peaking in December/January after highs around the Olympics

Age 18-34: CABLE SUBS, by Past-Month Viewing Period

TVE Use



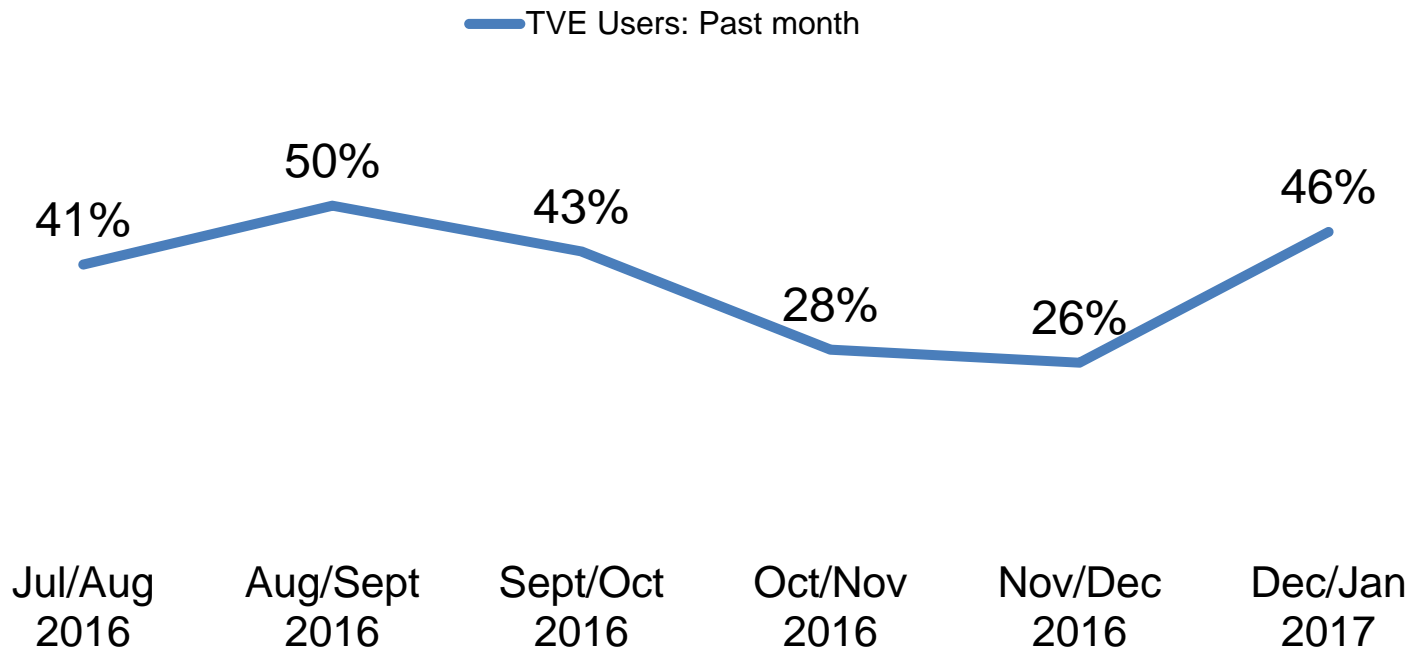
↑ Significantly higher than previous month(s)

↓ Significantly lower than previous month(s)

Older cable subs show the same type of holiday dip we saw for older MVPD subs

Age 35-64: CABLE SUBS, by Past-Month Viewing Period

TVE Use



↑ Significantly higher than previous month(s)

↓ Significantly lower than previous month(s)

Past-six-month TVE use has increased at least directionally among the youngest and oldest MVPD subscribers

Age 18-64: MVPD SUBS

1. TVE AWARENESS:

	Millennials 18-34		Gen X 35-49		Boomers 50-64	
	Jan-16	Aug'16 – Jan'17	Jan-16	Aug'16 – Jan'17	Jan-16	Aug'16 – Jan'17
Aided: Top Box	51%	49%	51%	48%	40%	39%
Aided: Top-2 Box	82%	78%	76%	78%	59%	63%

2. TVE USAGE:

	Millennials 18-34		Gen X 35-49		Boomers 50-64	
	Jan-16	Aug'16 – Jan'17	Jan-16	Aug'16 – Jan'17	Jan-16	Aug'16 – Jan'17
NET: Usage in past 6 months	53%	57%	53%	45%	38%	44%
NET: Usage once a month	47%	52%	44%	41%	29%	36%
Heavy TVE Users	26%	33%	20%	24%	9%	19% ↑

3. TVE IMPACT:

Impact on perceptions and value of MVPD

	Millennials 18-34		Gen X 35-49		Boomers 50-64	
	Jan-16	Aug'16 – Jan'17	Jan-16	Aug'16 – Jan'17	Jan-16	Aug'16 – Jan'17
NET: More positive perception	62%	62%	55%	46% ↓	46%	44%
NET: More value for the money	62%	61%	58%	52%	51%	50%

↑ Significantly higher than previous wave

↓ Significantly lower than previous wave

Heavy TVE users = "Authenticated TVE user" who uses TVE once a day or several times a week

Among cable subs, increases are seen for heavy users in particular—directionally across all generations

Age 18-64: CABLE SUBS

1. TVE AWARENESS:

Aided: Top Box
Aided: Top-2 Box

Millennials 18-34

Jan 2016	Aug'16 -Jan'17
54%	49%
88%	77%↓

Gen X 35-49

Jan 2016	Aug'16 -Jan'17
48%	49%
78%	78%

Boomers 50-64

Jan 2016	Aug'16 -Jan'17
42%	34%
61%	68%

2. TVE USAGE:

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

58%	58%
53%	53%
27%	33%

51%	40%↓
44%	38%
19%	23%

41%	43%
32%	38%
11%	20%

3. TVE IMPACT:

Impact on perceptions and value of MVPD

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

62%	63%
62%	62%

53%	44%
58%	51%

48%	45%
53%	50%

↑ Significantly higher than previous wave

↓ Significantly lower than previous wave

Heavy TVE users = "Authenticated TVE user" who uses TVE once a day or several times a week

Focusing on Millennials, heavy TVE use is up 9 points since January of 2015

Age 18-34: CABLE SUBS (Millennials)

1. TVE AWARENESS:

	January 2015	July 2015	January 2016	Aug'16 – Jan'17
Aided (after concept described): Top Box	62%	65%	54%	49%
Aided (after concept described): Top-2 Box	77%	90%	88%	77%↓

2. USAGE OF TVE:

NET: Usage in past 6 months	61%	47%	58%	58%
NET: Usage once a month	59%	44%	53%	53%
Heavy TVE Users	24%	27%	27%	33%

3. TVE IMPACT:

Impact on perceptions and value of cable company

NET: More positive perception	54%	62%	62%	63%
NET: More value for the money	68%	65%	62%	62%

↑ Significantly higher than previous wave

↓ Significantly lower than previous wave

Heavy TVE users = "Authenticated TVE user" who uses TVE once a day or several times a week

TVE use and perceived impact on perception and value are significantly higher than average among Hispanics

Age 18-74: HISPANIC MVPD SUBS

1. TVE AWARENESS:

	Total Aug'16 -Jan'17	Hispanic
Aided: Top Box	43%	45%
Aided: Top-2 Box	70%	79%

2. TVE USAGE:

NET: Usage in past 6 months	45%	59% ↑
NET: Usage once a month	39%	55% ↑
Heavy TVE Users	22%	39% ↑

3. TVE IMPACT:

Impact on perceptions and value of MVPD

NET: More positive perception	45%	68% ↑
NET: More value for the money	50%	67% ↑

↑ Significantly higher than total

↓ Significantly lower than total

*NOTE: Sample size is small. Interpret results with caution.

Heavy TVE users = "Authenticated TVE user" who uses TVE once a day¹³ or several times a week



Use of TVE is significantly higher among those who speak Spanish as much as English—as is perceived value based on TVE

Age 18-74: HISPANIC MVPD SUBS

1. TVE AWARENESS:


	Speak Only/ Mostly English	Speak Both Equally
Aided: Top Box	45%	42%
Aided: Top-2 Box	81%	75%


2. TVE USAGE:

NET: Usage in past 6 months	55%	61%
NET: Usage once a month	50%	61% 
Heavy TVE Users	32%	50% 

3. TVE IMPACT:

Impact on perceptions and value of MVPD

NET: More positive perception	70%	66%
NET: More value for the money	59%	79% 

 Significantly higher than total

 Significantly lower than total

*NOTE: Sample size is small. Interpret results with caution.

Heavy TVE users = “Authenticated TVE user” who uses TVE once a day 4 or several times a week



TVE use is also much stronger among African Americans than among the MVPD base overall

Age 18-74: AFRICAN AMERICAN MVPD SUBS

1. TVE AWARENESS:

	Total Aug'16 - Jan'17	African American
Aided: Top Box	43%	54%
Aided: Top-2 Box	70%	70%


2. TVE USAGE:


NET: Usage in past 6 months	45%	61% 
NET: Usage once a month	39%	59% 
Heavy TVE Users	22%	37%

3. TVE IMPACT:

Impact on perceptions and value of MVPD

NET: More positive perception	45%	51%
NET: More value for the money	50%	52%

 Significantly higher than total

 Significantly lower than total

*NOTE: Sample size is small. Interpret results with caution.

Heavy TVE users = "Authenticated TVE user" who uses TVE once a day ¹⁵ or several times a week

MVPD, cable networks generally, and cable news networks have seen directional increases in use since last year

Age 18-64: MVPD SUBS

Sites or apps from...

	January 2015	July 2015	January 2016	Aug'16 - Jan'17
BASIC CABLE NETWORK	24%	24%	22%	27%
MVPD	26%	22%	17%	22%
BROADCAST NETWORK	18%	20%	26%	22%
CABLE SPORTS	19%	20%	18%	20%
PREMIUM CHANNEL	20%	25%	18%	20%
CABLE CHANNEL NEWS	n/a	n/a	9%	18%

↑ Significantly higher than previous wave

↓ Significantly lower than previous wave



Awareness and Impact

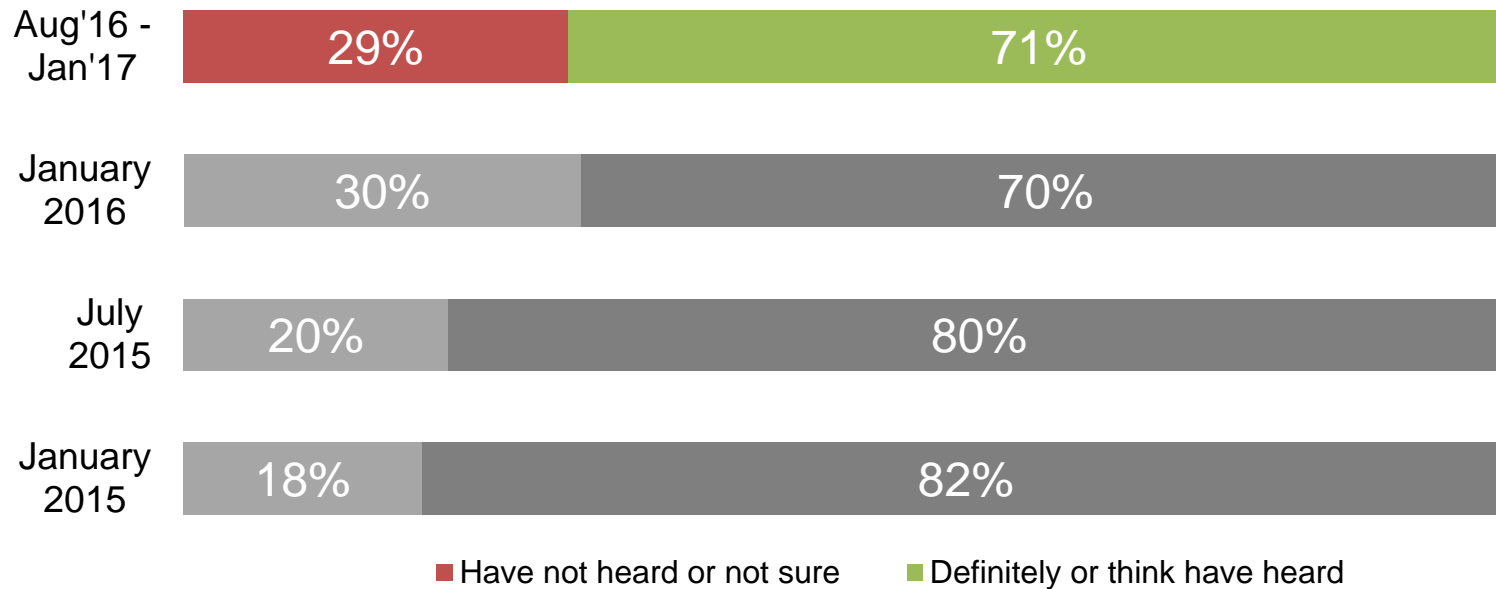
Unaided and aided awareness of TVE, impact on perceptions

For MVPD subs, there's been no change in aided awareness of the TV Everywhere "concept" since last year

Age 18-64: MVPD SUBS

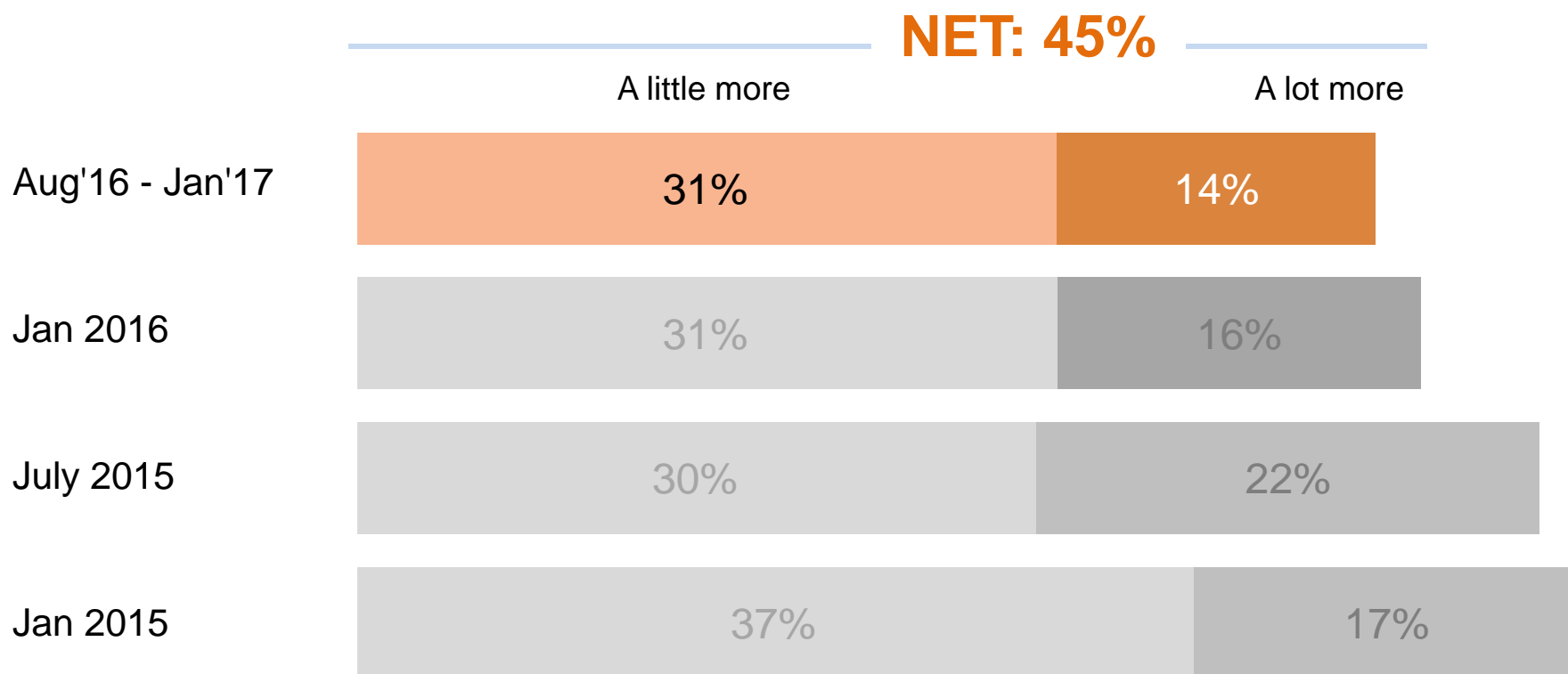
Aided Awareness

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



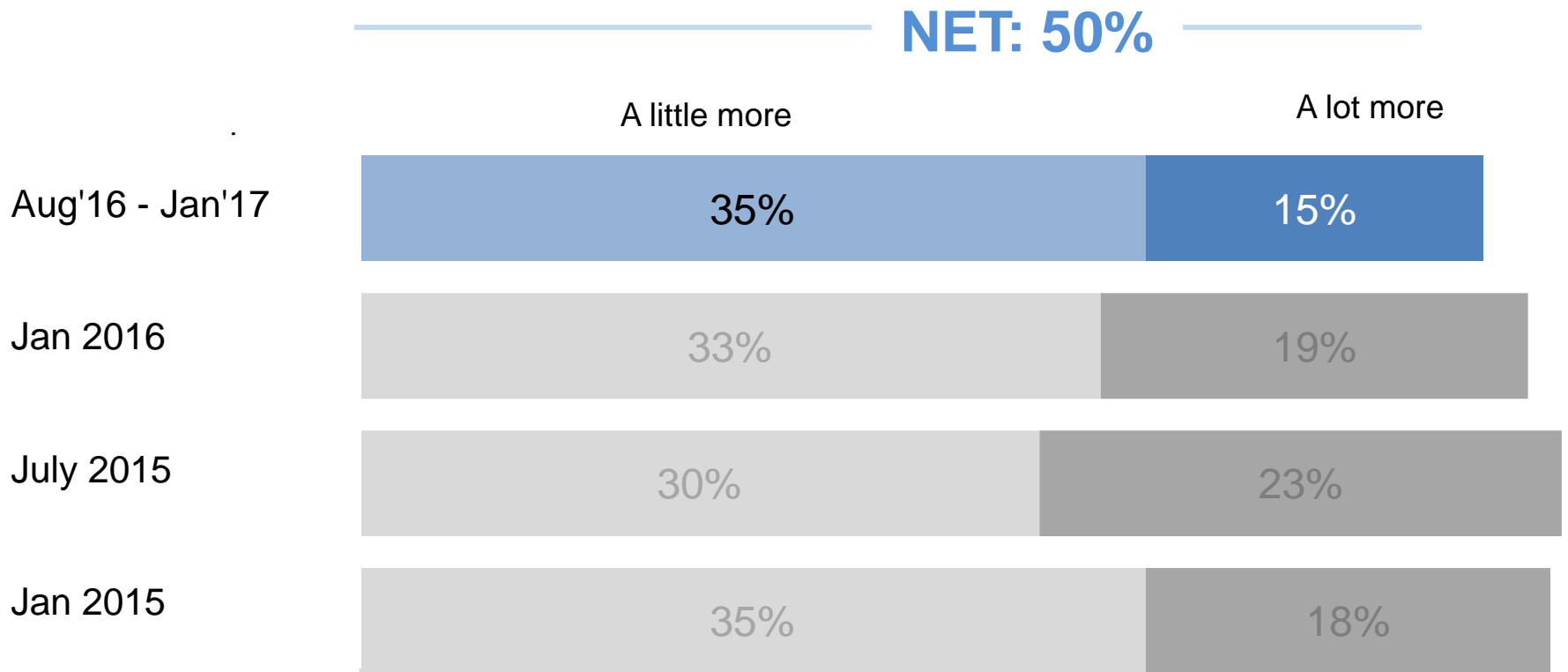
The proportion of MVPD subs saying TVE gives them a more positive feeling about cable networks has remained unchanged

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



There's also been no significant change in the proportion saying TVE makes them more positive about their MVPD

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

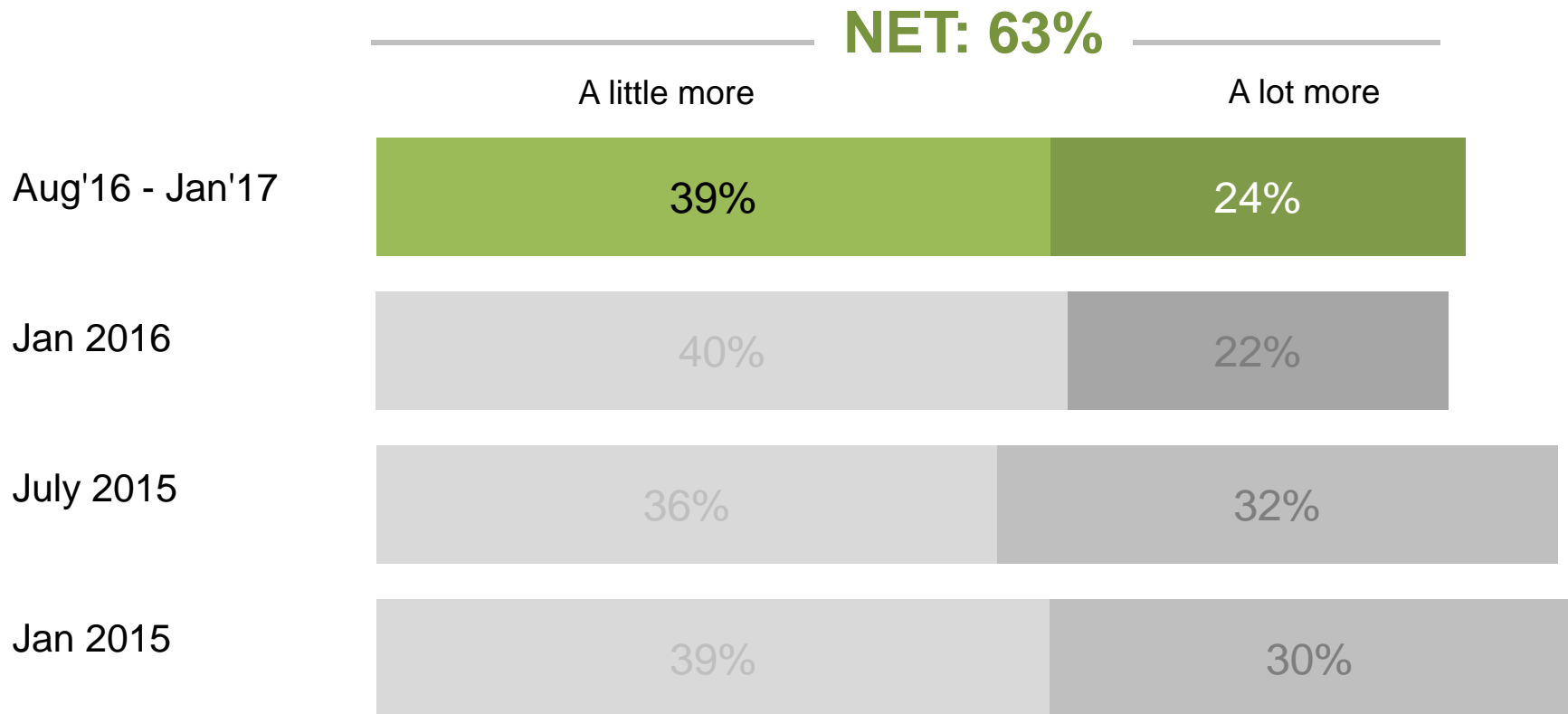


Over 6 in 10 MVPD subs say TVE helps them feel that they get more value from their premium network subscription

Age 18-64: MVPD SUBS

% perceive more value for the money

A Premium Network

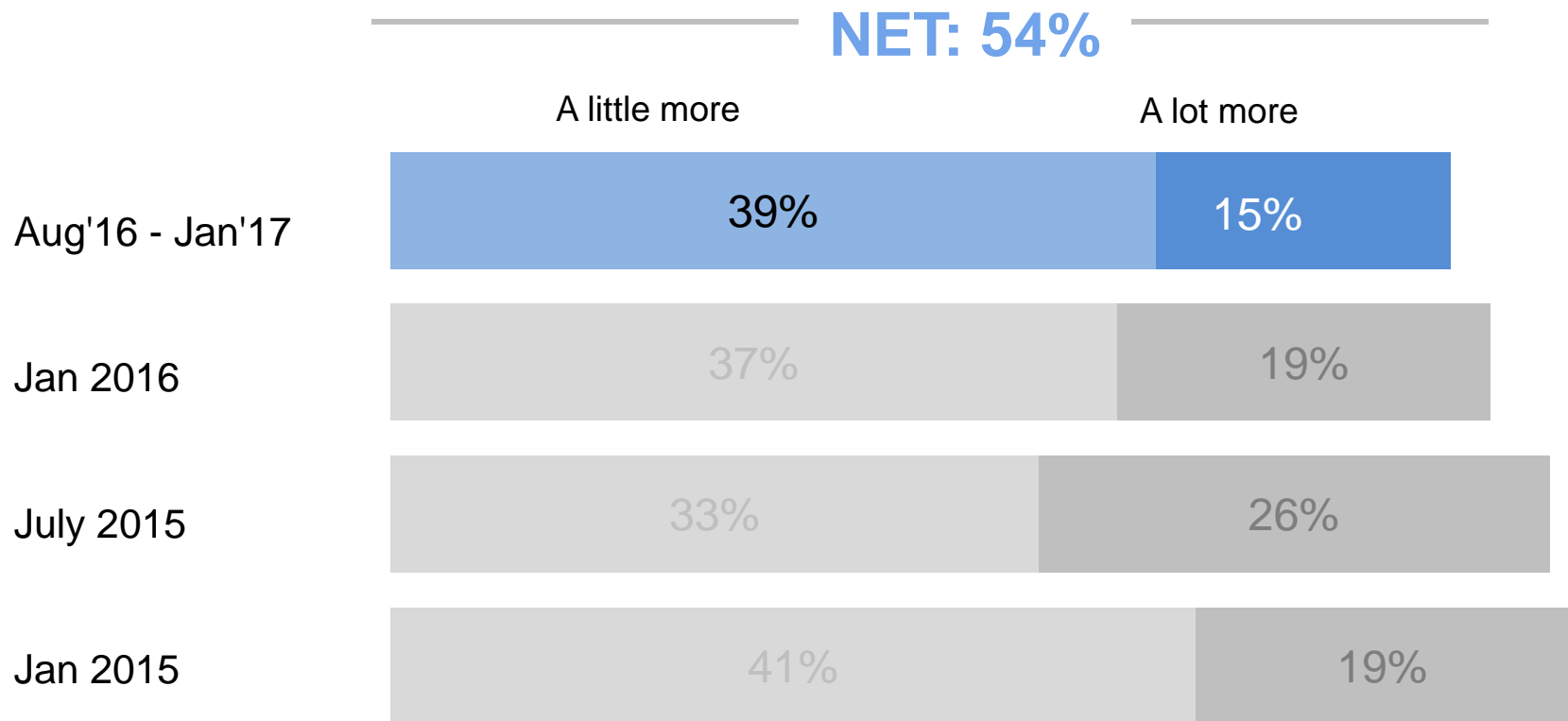


More than 5 in 10 MVPD subs feel they get more value from their MVPD subscription thanks to TVE

Age 18-64: MVPD SUBS

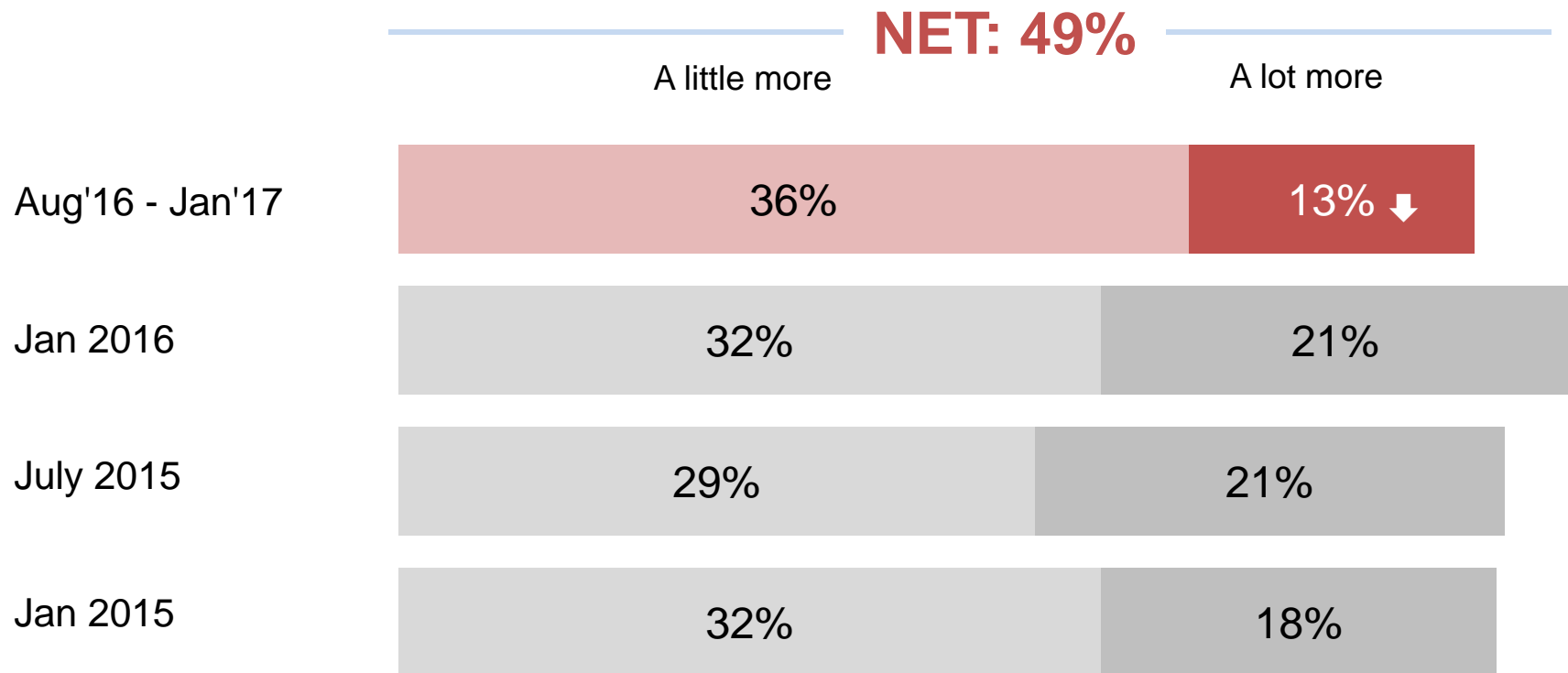
% perceive more value for the money

Your MVPD



This wave, we see a drop in cable subs feeling “a lot” more positive about their cable provider because of TVE

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



↑ Significantly higher than previous wave

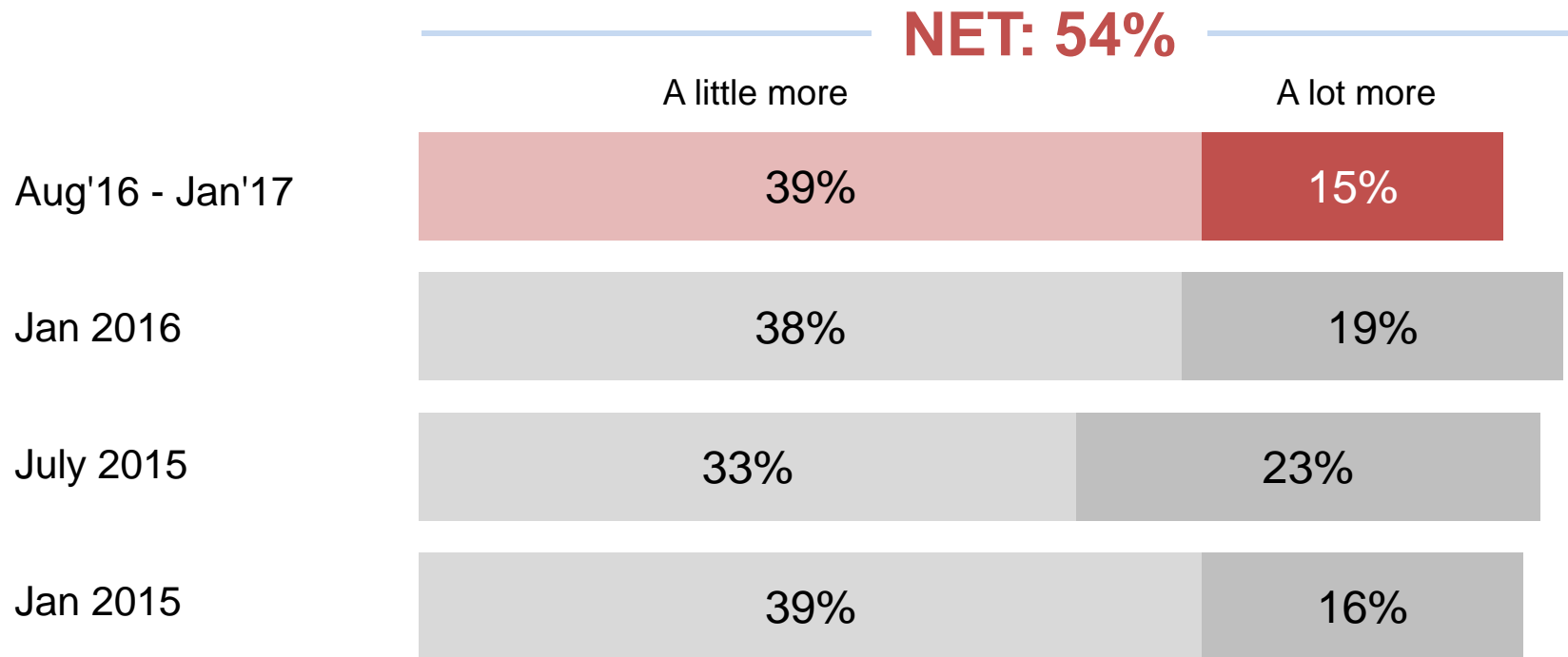
↓ Significantly lower than previous wave

We also see a directional drop in the proportion of cable subs feeling they get a lot more **value** from their provider

Age 18-64: CABLE SUBS

% who perceive more value for the money

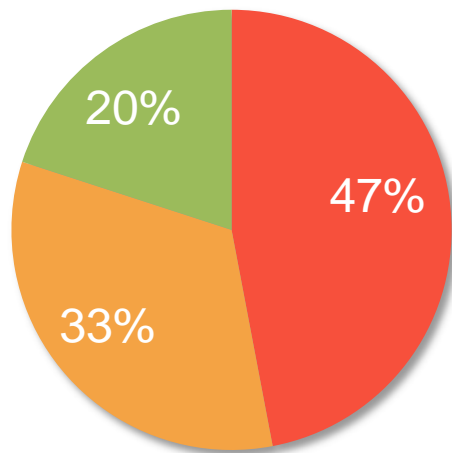
YOUR CABLE PROVIDER



As we've seen in the past, the heavier the use of TVE, the more positive the NPS score—by a wide margin

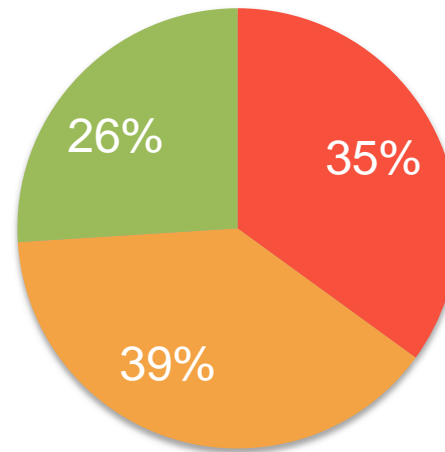
NPS SCORES: CABLE SUBS (18-64)

ALL Cable Subs



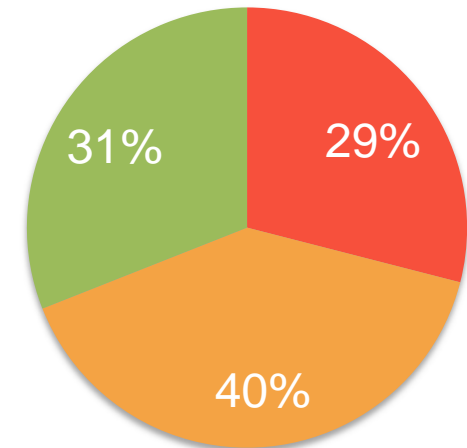
NPS: -27

TVE Users



NPS: -9

Heavy TVE Users



NPS: 2



Promoter



Neutral

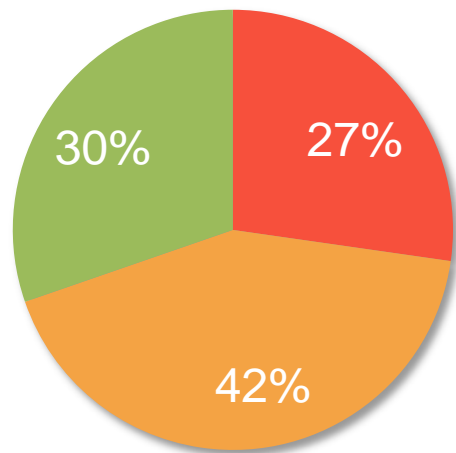


Detractor

NPS scores are also higher for cable subs with positive perceptions as a result of TVE, and for those who perceive more value

NPS SCORES: CABLE SUBS (18-64)

Those with a **positive** perception of provider as a result of TVE



NPS: 3



Promoter

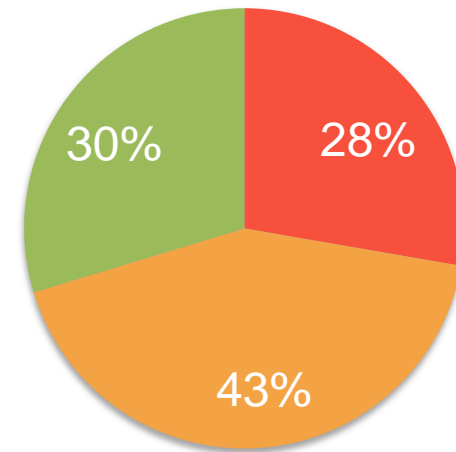


Neutral



Detractor

Those who **get more value** from provider as a result of TVE

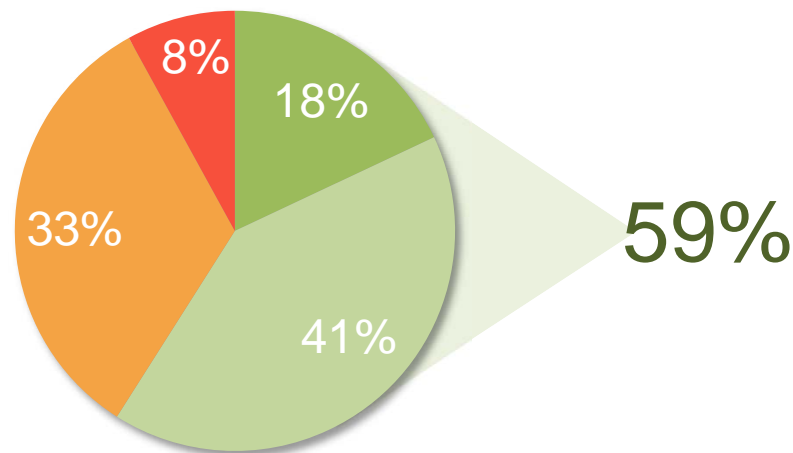


2

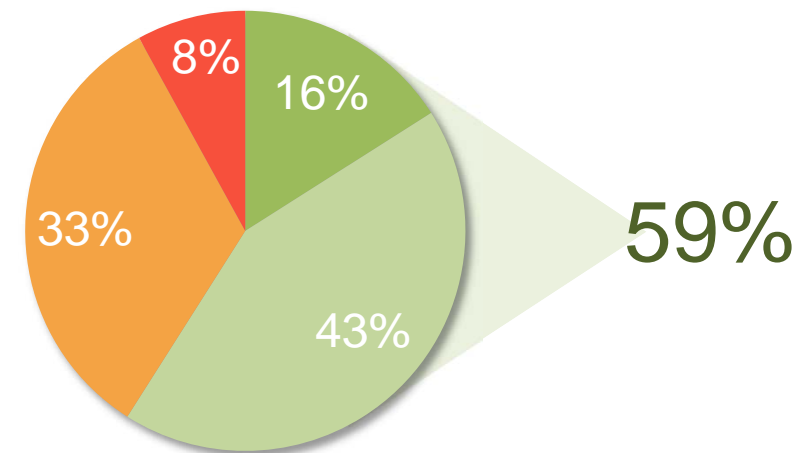
Among those who see a positive impact from TVE, ratings of overall cable value are higher than average (59% vs. 46%)

PROVIDER VALUE: CABLE SUBS (18-64)

Those with a **positive** perception of provider as a result of TVE



Those who **get more value** from provider as a result of TVE

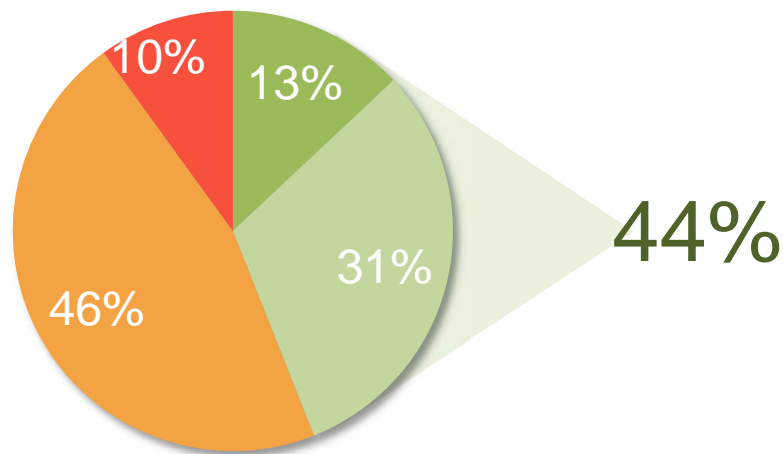


Much better A little better The same Got worse

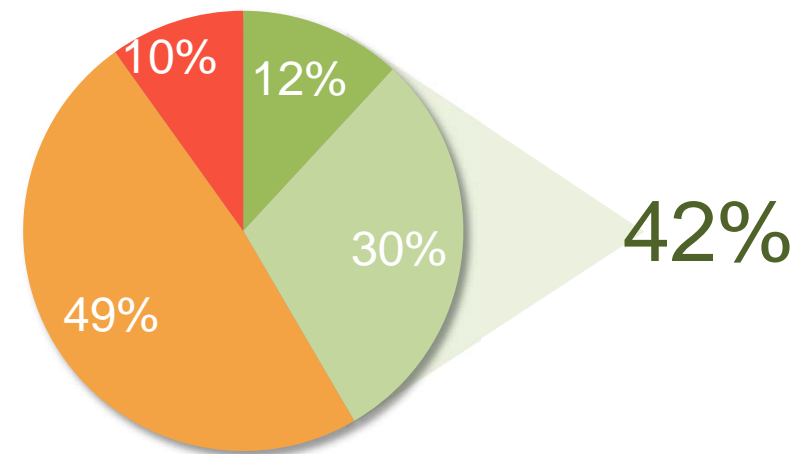
Similarly, those seeing a positive impact for TVE are 12 to 14 points more likely than average (30%) to say customer service has improved

CUSTOMER SERVICE RATINGS: CABLE SUBS (18-64)

Those with a **positive** perception of provider as a result of TVE



Those who **get more value** from provider as a result of TVE



■ Much better ■ A little better ■ The same ■ Got worse

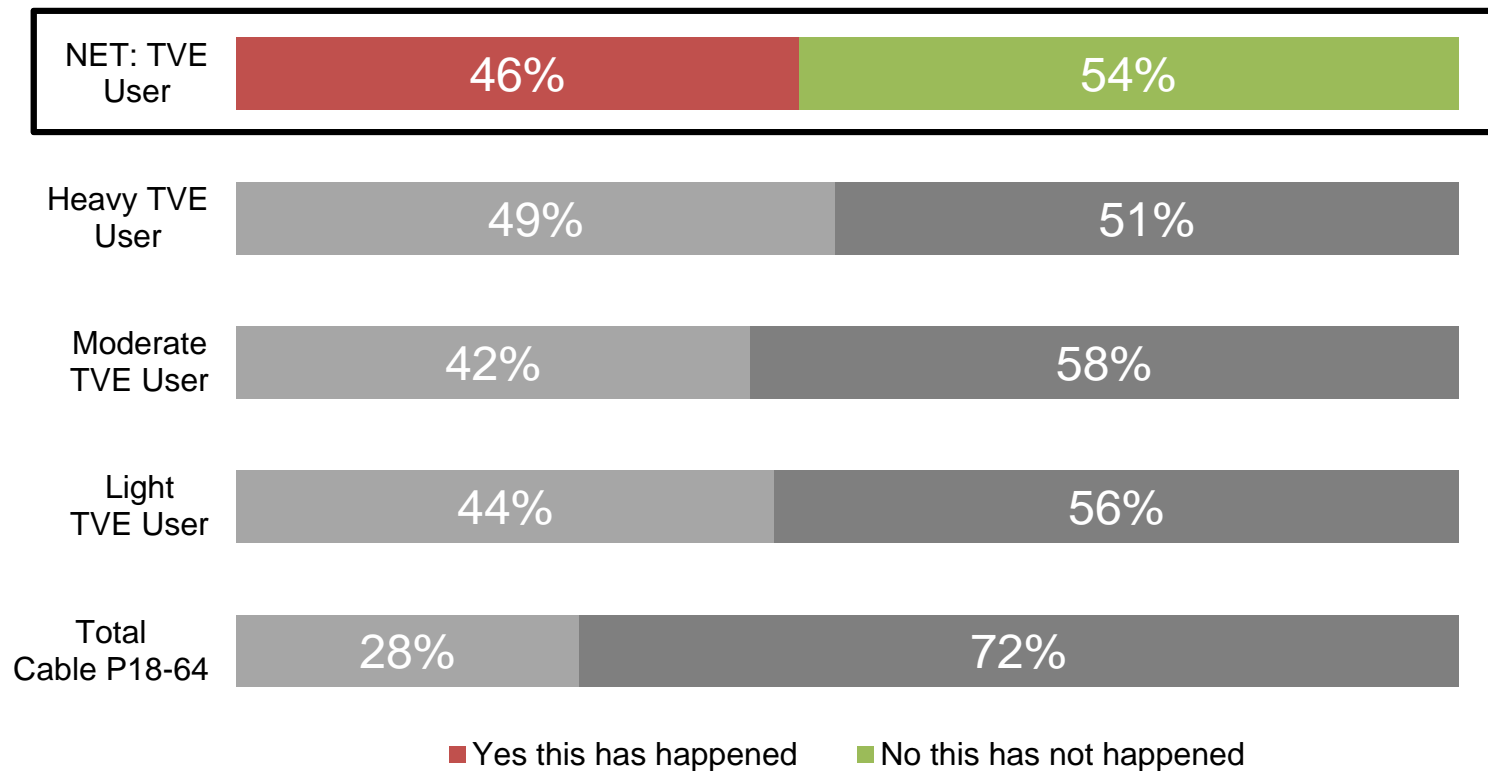


Barriers

The factors that inhibit TVE adoption and use

46% of TVE users have had to enter their credentials more than once because of a problem

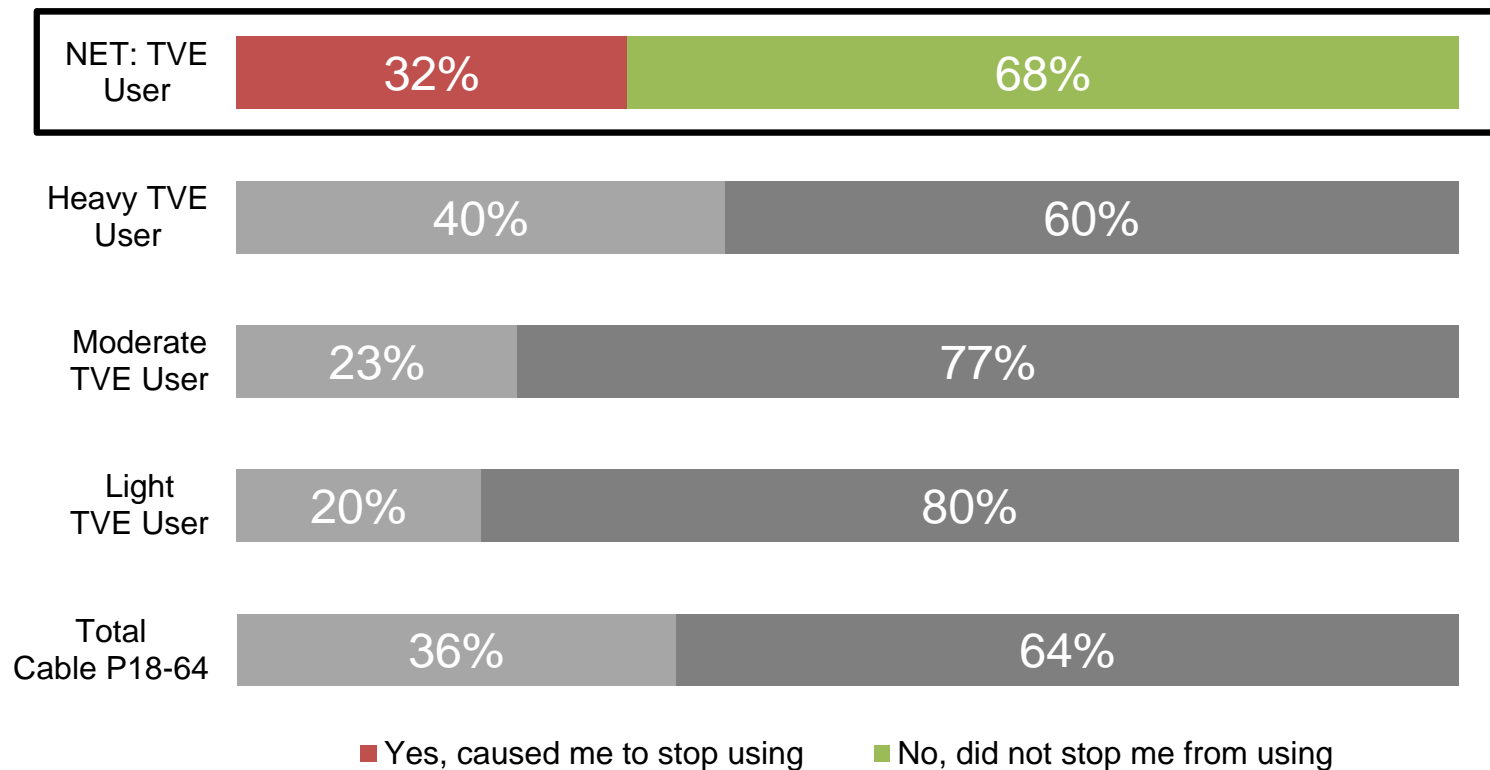
Age 18-64: CABLE SUBS



68% of TVE users who entered multiple times didn't let that problem stop them from using the site/app

Age 18-64: CABLE SUBS

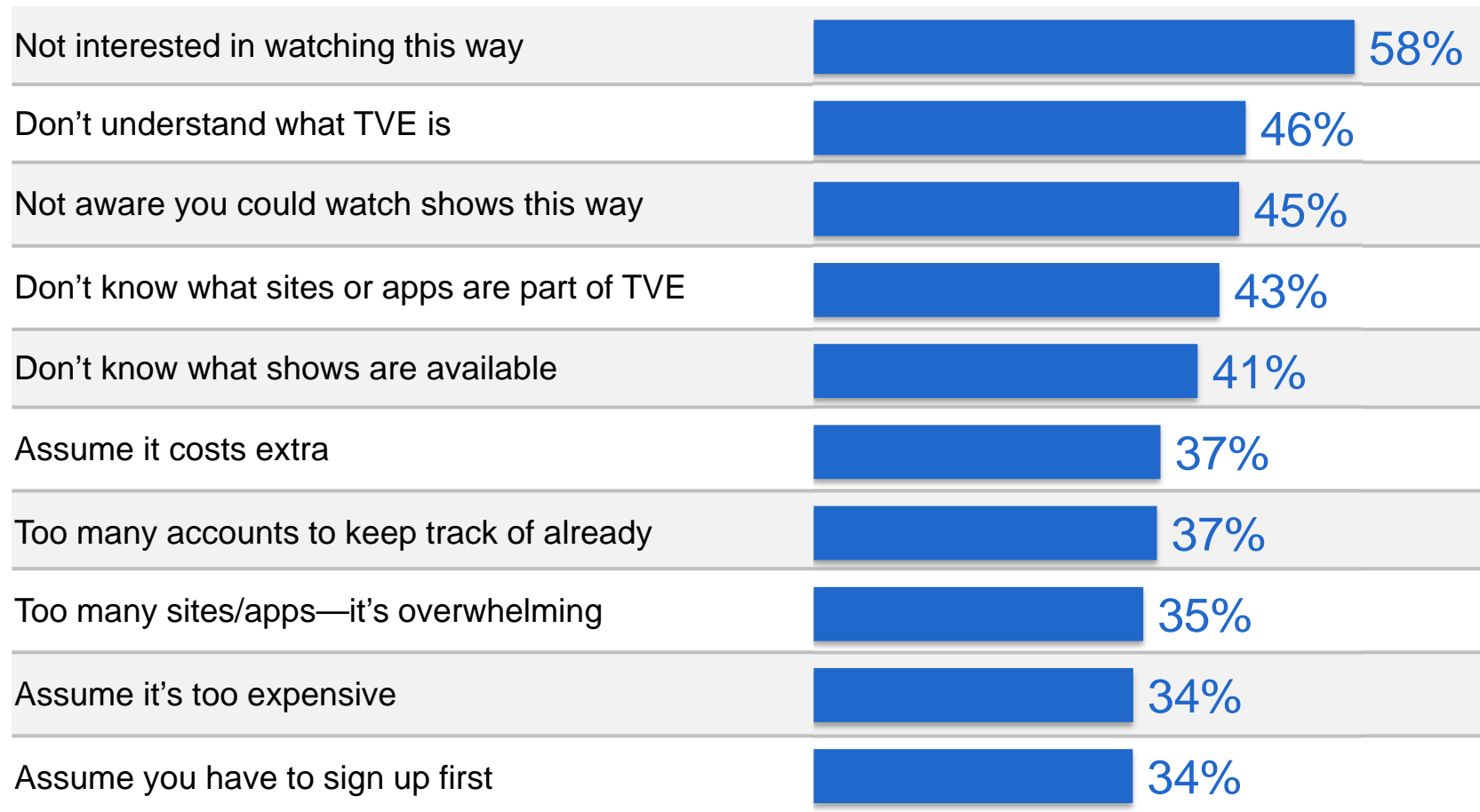
Had entered username/password more than once



The top three **barriers** to TVE use are consistent with last year: lack of interest, understanding, or awareness

CABLE SUBS 18-64, NEVER USED TVE

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

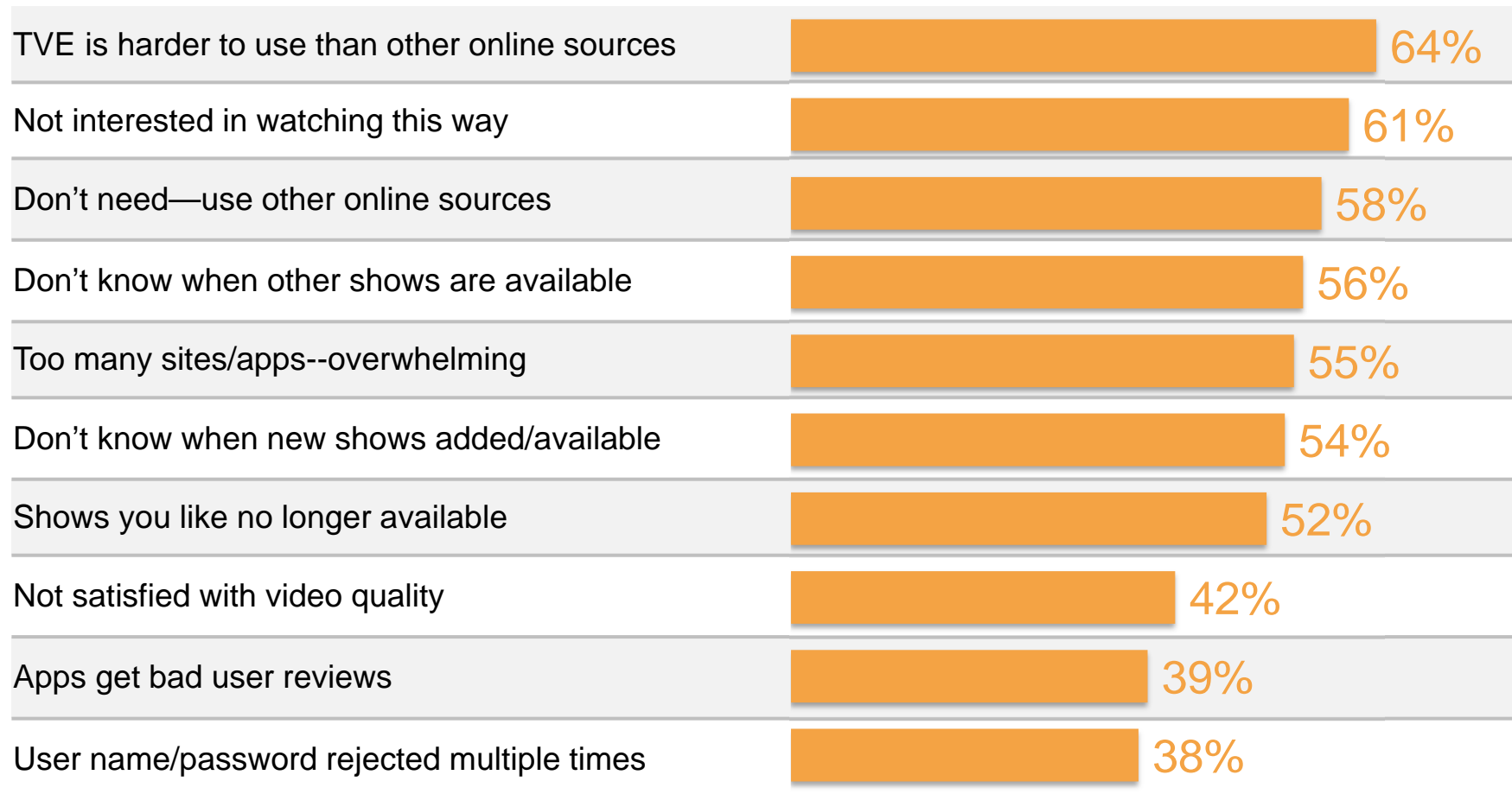


Q6H: Please tell us if each of the following is a reason why you have never used TV Everywhere.

One reason for **cutting back** on TVE use has jumped to the top—harder to use than other sources

CABLE SUBS 18-64, CURRENTLY USE TVE

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

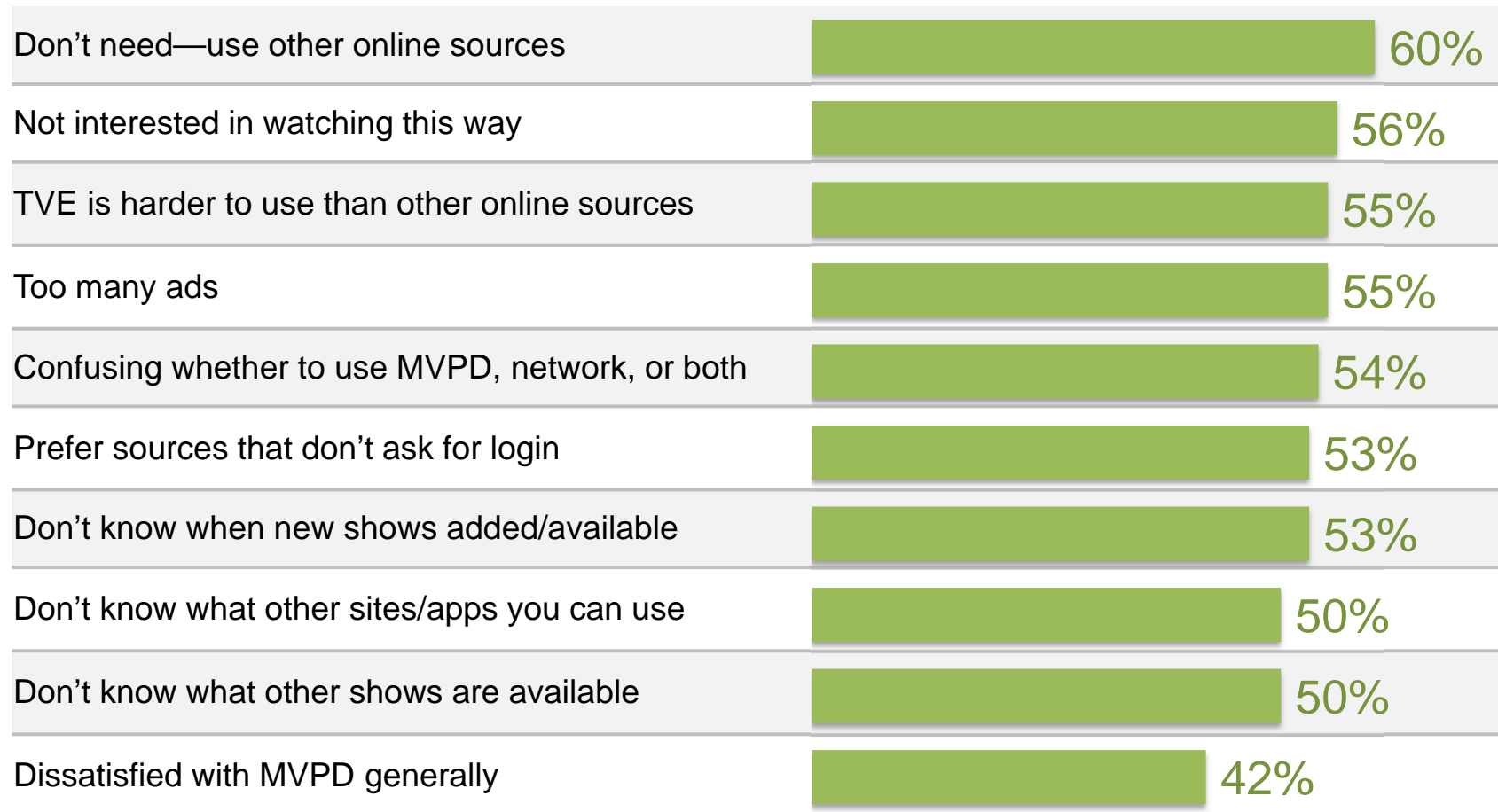


Q6H: Please tell us if each of the following is a reason why you have cut down your use of TV Everywhere.

Similarly, among current TVE users, one reason keeps them from **using it more**—reliance on other online sources

CABLE SUBS 18-64, CURRENTLY USE TVE

% citing each as major/minor reason for not using MORE (TOP REASONS)

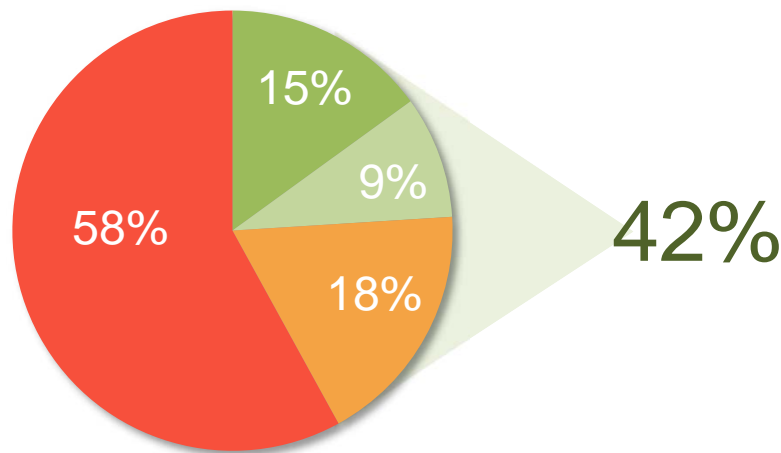


Q6H: Please tell us if each of the following is a reason why you * do not use TV Everywhere more than you have in the past

4 in 10 have heard of home-based automatic sign in; close to 6 in 10 say it would make them at least a little more likely to use TVE

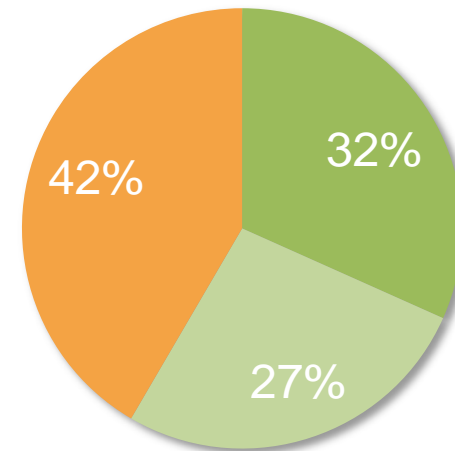
HOME-BASED AUTOMATIC SIGN IN: CABLE SUBS (18-64)

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

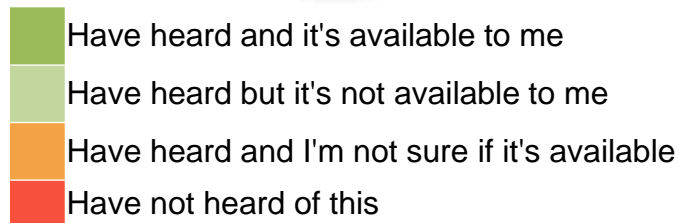
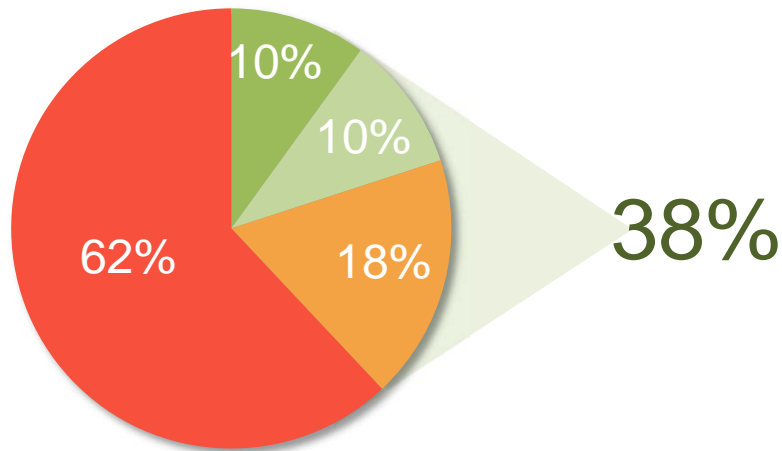


- A lot more likely to watch
- A little more likely to watch
- No impact

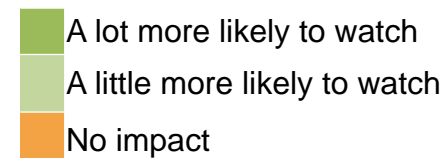
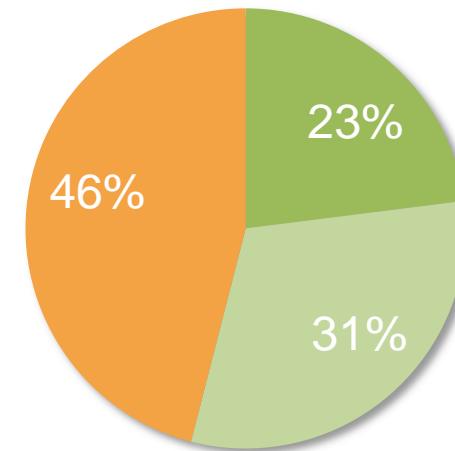
There's slightly less awareness of out-of-home single sign in, but more than 50% still say it would make them more likely to use TVE

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

AWARENESS



LIKELIHOOD TO WATCH



After a decline in January 2016, the proportion of non-users saying they'll begin using TVE is back up at 17%

MVPD Subs: Age 18-64

Non-User Likelihood to Begin Using

