

OTT Video & TV Everywhere: Partners, Alternatives, and Competition

TABLE OF CONTENTS

By Brett Sappington, Senior Director of Research; Hunter Sappington, Researcher; and Tu Skuse, Research Analyst, Parks Associates

Synopsis U.S. OTT Services The evolution of OTT Number of OTT Video Services in the U.S., 2013-2017 video services has led to increased competition in the 250 Closed New Existing market, including new partnerships, alternatives to pay TV, 200 and changing priorities by consumers. This # of OTT Video Services report includes insights 150 into the new era of competition in OTT video and pay TV and 100 assesses trends that affect the video ecosystem across 50 global markets, including churn and retention. The report 0 also includes global forecasts for OTT video and pay-TV -50 subscribers. 2013 2014 2015 2016 2017 © Parks Associates

Publish Date: 4Q 17

"Operator and OTT video service partnerships are becoming more common, with companies working together in promotions, OTT service distribution and bundling, integration into the set-top box, zero-rating of video in data services, and billing," said Brett Sappington, Senior Director of Research, Parks Associates.

Contents

1.0 Report Summary

- 1.1 Purpose of Report
- 1.2 Scope of Report
- 1.3 Research Approach/Sources

2.0 The State of OTT Video and TV Everywhere

- 2.1 Competition in OTT Video Services
- 2.2 The Role of TV Everywhere
- 2.3 Adoption of OTT Video Services
- 2.4 Primary versus Complementary Video Service Adoption

3.0 OTT Video Partnerships

- 3.1 OTT: Operator Partnerships
 - 3.1.1 Promotion
 - 3.1.2 Distribution Partnerships and Broadband Bundling
 - 3.1.3 Set-top Box Integration



OTT Video & TV Everywhere: Partners, **Alternatives, and Competition**

TABLE OF CONTENTS

3.1.4	Zero-Rating

3.1.5 Billing

3.2 OTT: OTT Partnerships

3.2.1 Distribution/Bundling

3.2.2 Promotion/Awareness

3.2.3 Content

3.3 OTT: Aggregator Partnerships

3.3.1 Traditional Pay-TV Providers

3.3.2 CE Manufacturers

3.3.3 Subscription OTT Aggregators

Online Video Distributors/Virtual MVPDs 3.3.4

3.3.5 Ad-based OTT Aggregators

3.4 Additional OTT Service Partnerships

4.0 Forecast

4.1 Forecast Methodology

4.2 Forecast of OTT Video Households and Subscriptions

5.0 Implications and Recommendations

6.0 Appendix

6.1 Glossary

6.2 Index

6.3 Image Sources

Figures

Number of OTT Video Services in the U.S. Market (2013-2017)

Number of OTT Video Services in the Canadian Market (2013-2017)

Share of OTT Video Services by Business Model, North America (Q3 2017)

Top U.S. Subscription OTT Video Services by Volume (Q2 2017)

Awareness of TV Everywhere Features (2013-2016)

U.S. Home Entertainment Device Ownership (2009-2017)

Penetration of OTT Video Service Subscriptions, U.S. (2013-2017)

Number of OTT Video Service Subscriptions per Household, U.S. (2014-2017)

Concurrence of Pay-TV and OTT Service Subscriptions (2014-2017)

Global OTT Video Service Forecast Methodology

Forecast: Household Penetration of Subscription OTT Video Services by Region (2017-

2022)

Apple

Forecast: Volume of OTT Video Service Subscriptions by Region (2017-2022)

List of Companies

Acorn TV iTunes Airtel **KlowdTV** Altice USA Knippr Amazon Kocowa **KPN Amazon Channels** Amazon Video **Kwese AMC** LG **AMC Premiere** Liberty

AMC Selekt Lifetime Movie Club

Anime Strike LIT Mediacom



OTT Video & TV Everywhere: Partners, Alternatives, and Competition

TABLE OF CONTENTS

FilmStruck

Fire TV Fortumo

Apple TV Midcontinent Communications

AT&T MLB.TV Atlantic Broadband Molotov

Bell Canada National Lacrosse League

BingeOn NCTC
Bouygues Netflix
CBS All Access Optimum
CenturyLink Stream Optus
Charter Orange
Cheddar Outside TV
Chernin Group Paramount+

Chromecast PlayStation Vue Com Hem Pluto TV PPV Comcast Comic-Con HQ Presto Crackle **Proximus** Crave TV Qello **CRTC RCN** Crunchyroll Revry

Dekkoo Rogers Cable
Deutsche Telekom Roku

DIRECTV NOW Shout Factory TV

Showtime **DISH Network Dove Channel** Sky DramaFever Sling TV **DTAC Smart** Smartfren Ellation **Eros Now** Sony **EST** Spark Fandor Spotify StarHub FeeIn

> Starz Stream On

Stream TV

Foxtel Suddenlink Frontier Swisscom **FuboTV** TalkTalk Fullscreen **TDC Group Funimation Now** Telenor **FX Networks** Telkom FX+ Telstr Gaia Three Gaiam TiVo

GCI T-Mobile
Ginx Tribeca Short List

Go Binge TubiTV

Go90 Turner Broadcasting
Google Twitch

Google Twitch
Google Fiber TYT Network
Grande Communications UltraViolet
Grokker UP Faith & Family



OTT Video & TV Everywhere: Partners, Alternatives, and Competition

TABLE OF CONTENTS

Hallmark Channel Urban Movie Channel

HBO Verizon **HBO NOW** Viacom Heera Videotron History Vault Viki Hi-YAH Vindicia HOOQ Virgin Media Hulu Vodafone Hulu with Live TV **VRV**

ICI Tou.tv WideOpenWest

IdeaXUMOiFlixYouTubeiiNetYouTubeTV

Attributes

Parks Associates 5080 Spectrum Drive Suite 1000W Addison, TX 75001

800.727.5711 toll free 972.490.1113 phone 972.490.1133 fax

parksassociates.com sales@ parksassociates.com Authored by Brett Sappington, Hunter Sappington, and Tu Skuse

Executive Editor: Jennifer Kent Published by Parks Associates

© October 2017 Parks Associates

Dallas, Texas 75001

All rights reserved. No part of this book may be reproduced, in any form or by any means, without permission in writing from the publisher.

Printed in the United States of America.

Disclaimer

Parks Associates has made every reasonable effort to ensure that all information in this report is correct. We assume no responsibility for any inadvertent errors.