

Our inaugural Voice of the Consumer survey pursued questions about what consumers like or dislike about both PayTV and OTT streaming services. The bottom line, consumers want the best of both worlds – meaning they want the flexibility of

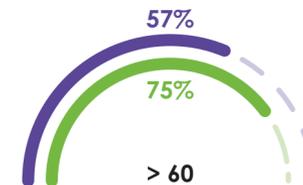
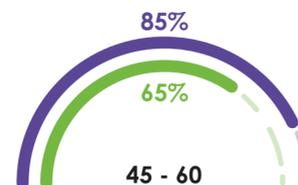
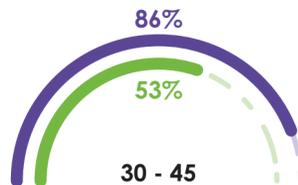
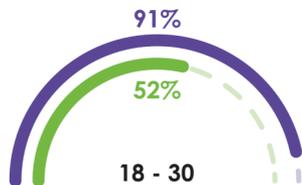
STREAMING combined with the familiarity and reliability of **PAY TV**.

No surprise, subscribers over the age of 60 are most likely to have a pay TV subscriptions. And, yes Millennials and Gen Z lead with streaming, but they have not completely abandoned pay TV!

● Stream ● Pay TV

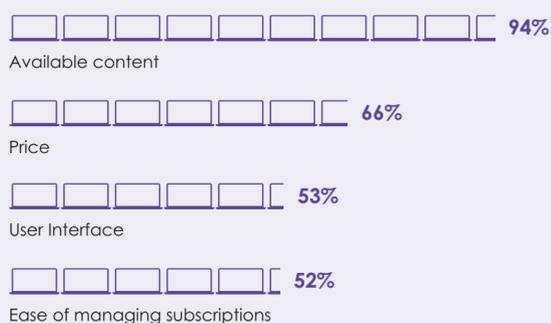
How do consumers watch video?

Overall, the number of streaming subscribers surpasses those paying for a traditional TV subscription.

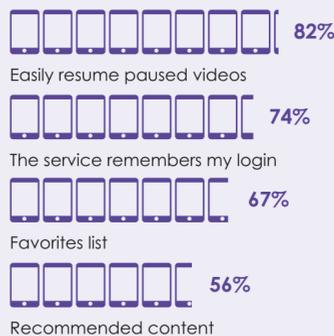


STREAMING

Content is the top reason for subscribing to a streaming service.

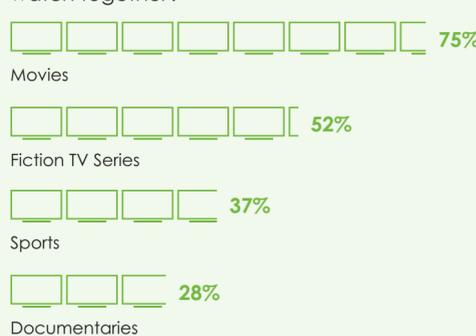


Ease of Use appreciated by consumers



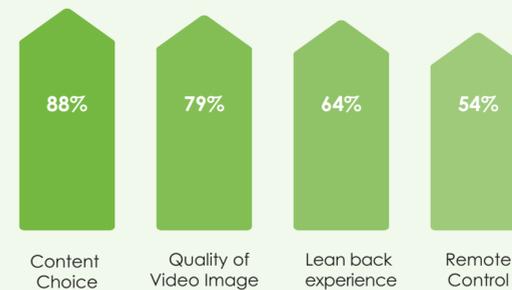
PAY TV

85% of TV viewers watch TV as a family. What do they watch together?



86% of pay TV subscribers are satisfied, quite satisfied or very satisfied.

Content is at the top of the list when asked what they like about their subscriptions.



Streamers want pay TV-like features.

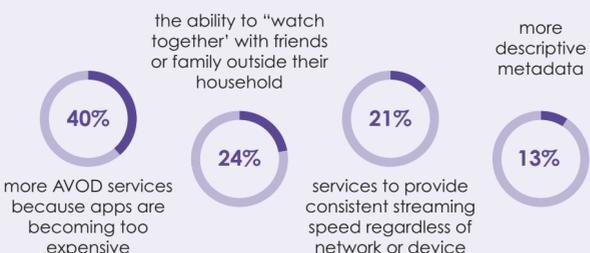


Pay TV subs want streaming features



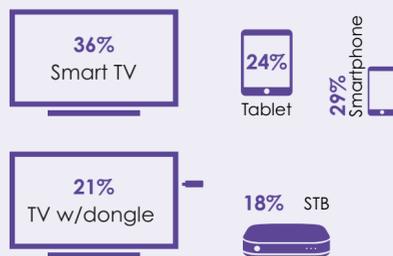
Streaming subscribers are very happy with their services.

If they could change ANYTHING about their streaming services, they want

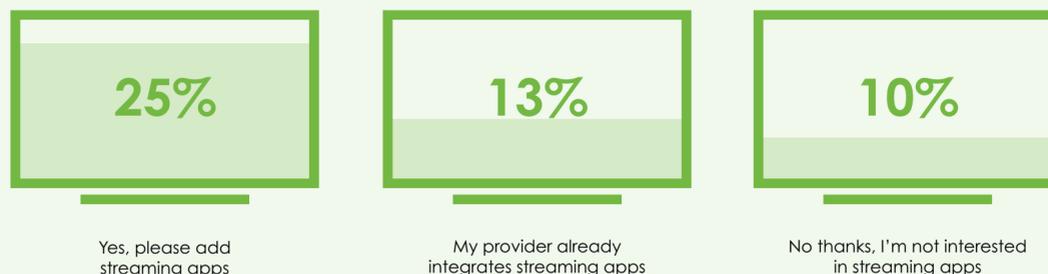


Right now, streaming consumers

are using Smart TVs more than smartphones.



Pay TV subs interested in integrated services



SUMMARY

Consumers want the best of both worlds when it comes to enjoying video content. Subscribers want **control** as evidenced by their desire to **PAUSE** pay TV subscriptions, **CURATE** their own channel bundles or prioritizing **EASE** of managing streaming subscriptions.

Subscribers crave **convenience** based on liking streaming features where service easily resumes paused content, one-time only login and creating favorites lists. And consumers **expect** a high-quality experience whether it's pay TV or streaming.