

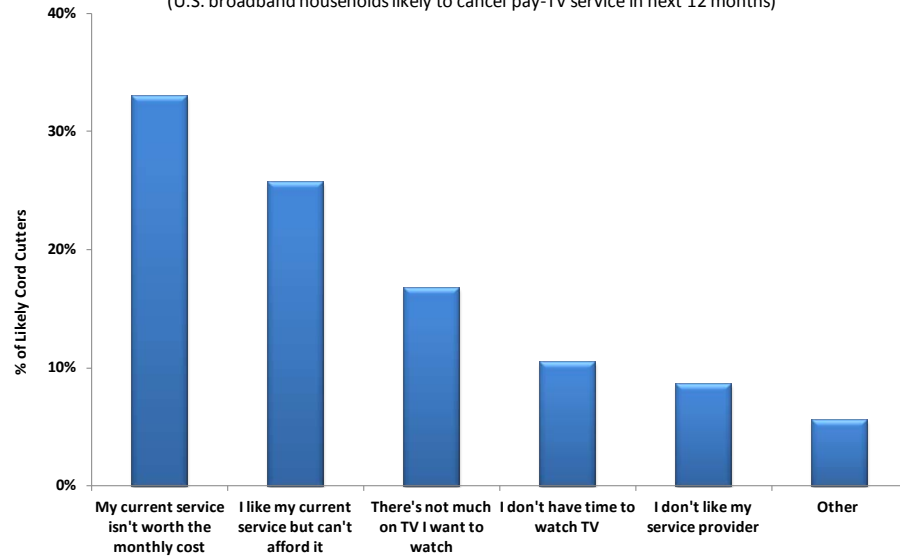
**Synopsis**

This report examines several new threats and challenges that are facing the traditional pay-TV ecosystem throughout the world. The report outlines the current state of pay TV, the economic landscape for video services, and the leading threats to pay TV providers, including the rise of massive consolidated competitors, cable networks and content producers going direct-to-consumer, and new entrants disrupting the content space. The report assesses the future for pay-TV services and provides a forecast for pay-TV subscribers through 2018.

**Motivations for Cord Cutters**

**Reason for Considering Canceling Pay-TV Service**

(U.S. broadband households likely to cancel pay-TV service in next 12 months)



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"In both established and emerging markets, pay TV is facing greater challenges and competition than it has encountered at any time in the industry's past," said Brett Sappington, director of research, Parks Associates. "The increasing penetration and use of connected devices have established a new channel for video services. The traditional pay-TV ecosystem is set to change radically, both from existing players taking on new roles and new entrants changing how the game is played. Everyone in the ecosystem needs to understand how this new pay-TV world will evolve in order to survive."

**Contents**

**The Bottom Line**

**Dashboard**

**1.0 Report Summary**

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

**2.0 Threats, Opportunities, and Outcomes**

**3.0 The State of Global Pay TV**

- 3.1 Growth of Pay TV
- 3.2 Trends in Pay TV
  - 3.2.1 Consolidation

- 3.2.2 Diversification of Content Sources
- 3.2.3 Operator OTT Services
- 3.2.4 Continued Cord-cutting / Cord-shaving
- 3.2.5 Content Escaping the Expected Delivery Path

**4.0 Market Disruption: The Emergence of Giant Competitors**

- 4.1 Overview
- 4.2 Drivers and Inhibitors to the Emergence of Giant Competitors
- 4.3 The Market Impact of the Emergence of Giant Competitors
- 4.4 Potential Outcomes of the Emergence of Giant Competitors
- 4.5 Conditions Required for Pay-TV Disruption

**5.0 Market Disruption: Cable Networks and Other Creators Go Direct-to-Consumer**

- 5.1 Overview and Evidence
- 5.2 Drivers and Inhibitors
- 5.3 Market Impact of Direct-to-Consumer
- 5.4 Potential Outcomes of Direct-to-Consumer Services
- 5.5 Conditions Necessary for Pay-TV Disruption

**6.0 Market Disruption: Outsiders Disrupt Pay TV via Acquisition of Content Rights**

- 6.1 Overview and Evidence
- 6.2 Drivers and Inhibitors for Outsider Disruption
- 6.3 Market Impact of Outsider Disruption via Content Acquisition
- 6.4 Potential Outcomes of Outsider Disruption via Content Acquisition
- 6.5 Conditions Necessary for Direct-to-Consumer Scenarios

**7.0 Implications and Recommendations**

**8.0 Appendix**

- 8.1 Forecast Methodology
- 8.2 Glossary
- 8.3 Company Index

**Figures**

- Mapping of Potential Outcomes
- Global Forecast of Pay-TV Subscribers by Region (2013-2018)
- Global Pay-TV Subscriber Share by Region, Mid-2014
- Global Pay-TV Subscriber Share by Region, Mid-2014
- Awareness of TV Everywhere by Country (2014)
- Reasons for Canceling Pay-TV in the Next 12 Months
- Likelihood of Cancelling Pay-TV in the Next 12 Months
- Chromecast Users (2014)
- The Impact of Market Polarization
- Average ARPU by Size of Service Provider
- Premium Service Subscriptions by Size of Service Provider – U.S.
- Premium Service Subscriptions by Size of Service Provider – Germany
- Drivers and Inhibitors for Large / Multinational Competition
- The Market Impact of Large / Multinational Competition
- The Impact of Direct-to-Consumer Offerings
- Drivers and Inhibitors of Direct-to-Consumer Offerings
- Revenue Comparison of User Paid and Advertising OTT Models
- Market Impact of Direct-to-Consumer Offerings
- Video Consumption by Platform (2010-2014)
- The Impact of New Entrants on Content Licensing and Service Offerings

General Drivers and Inhibitors for New Entrants  
 Drivers and Inhibitors for Online Player Entrants  
 Drivers and Inhibitors for Current OTT Player Entrants  
 Drivers and Inhibitors for CE Maker Entrants  
 Drivers and Inhibitors for Retailer Entrants  
 The Market Impact of New Entrants on the Video Ecosystem  
 Video Consumption on TV Sets by Source (2010-2014)  
 Television Services Forecast Methodology

**Company Index**

Amazon	NBCUniversal
Apple	Netflix
AT&T	Orange
Baidu	Rakuten
Best Buy	RDK
Bright House Networks	Sainsbury's
BSkyB	Samsung
Comcast	Sony
Currys	Telefónica
Deutsche Telekom	Tesco
DIRECTV	Time Warner Cable
Discovery Networks	Tivibu
Facebook	TV Everywhere
Foxtel Play	Tving
Google	ViaPlay
HBO	Viasat
Hulu	Vodafone
LG Electronics	Wal-Mart
Liberty Global	Walt Disney
Miracast	YouTube

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