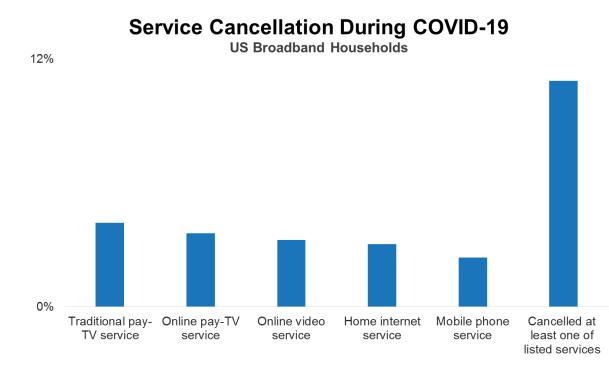


SERVICE: CONSUMER ANALYTICS

3Q 2020



Consumer Analytics Team



Yilan Jiang, Director



Xiaofan Tan, Consumer Insights Analyst I



Sharon Jiang, Intern

Industry Analyst



Kristen Hanich, Senior Analyst



SYNOPSIS

Consumer technology industries need thoughtful, strategic research that quantifies the impact of COVID-19 for the next several quarters. As with previous public health incidents, the majority of economic impacts will come from changes and aversions in consumer behaviors. This research addresses short- and long-term questions related to consumer engagement with broadband, pay-TV and OTT video services, including new subscriptions to and cancellations of leading services. It assesses which behavior changes are likely short term in nature and which changes will last.

ANALYST INSIGHT

"2020 has been an unprecedented time to be in the telecommunications and entertainment space. With an ongoing global pandemic, and worsening conditions in the United States, strong demand for technology products and services – surges in broadband usage; use of messaging, video calling, and virtual meeting applications; video game downloads; and subscriptions to streaming video services – will continue into 2021 and potentially even 2022."

- Kristen Hanich, Senior Analyst, Parks Associates

Number of Slides: 64

© Parks Associates







SERVICE: CONSUMER ANALYTICS

3Q 2020

CONTENTS

Key Questions Answered

Survey Methodology

COVID-19 Timeline

Executive Summary

- Industry Insight
- Home Broadband Provider Net Promotor Score
- Concern Over Paying Bills Among Heads of BB HHs
- Likelihood of Cutting Services in Next 12 Months by Concern Over Paying Bills
- Intention to Cancel Pay-TV Service
- OTT Service Trials & Conversions During COVID-19
- Pay-TV Adoption by Service Type

Impact on Internet Service Providers

- COVID-19 Impact on Home Service Subscriptions (Q2/20)
- Service Cancellation During COVID-19
 (Q2/20)
- Cancellation of Tested Home Services by Level of Concern Over Paying Bills (Q2/20)
- COVID-19 Impact on Home Internet or Mobile Services (Q2/20)
- COVID-19 Impact on Home Internet Service (Q2/20)
- Importance of Home Internet Service (2019 vs. 2020)
- Changes to Home Internet Service in the Next 12 Months (2019 - 2020)
- Likelihood of Making Changes to Home Internet Service (Q2/20)

- Likelihood of Making Changes to Mobile Service (Q2/20)
- Likelihood of Dropping Services by Concern Over Paying Bills (Q2/20)
- Substitutes for Mobile Phone Service (Q2/20)
- Service Cancellations During COVID-19 by Specific Company (Q2/20)

Consumer Perception of Service Providers

- Service Provider Net Promotor Score (2018 - 2020)
- Satisfaction with Handling of COVID-19 Crisis by Service Providers (Q2/20)
- Awareness of Home ISPs Responses to COVID-19 (Q2/20)
- Awareness of Mobile Service Providers Responses to COVID-19 (Q2/20)
- Consumer Perceptions of ISP's Handling of COVID-19 (Q2/20)
- Consumer Perceptions of Mobile Phone Service Providers' Handling of COVID-19 (Q2/20)
- Consumer Perceptions of Pay-TV Service Providers' Reactions to COVID-19 (Q2/20)

Impact to Pay TV and OTT Services

- Pay-TV & OTT Service Subscriptions (2011 2020)
- Pay-TV Adoption by Service Type (2019-2020)
- Online Pay-TV Services: Digital Newcomers vs. Services from Incumbents (Q1/20)
- OTT Service Use by Business Model During COVID-19 (Q2/20)
- OTT Service Trials and Conversions During COVID-19 (Q2/20)





SERVICE: CONSUMER ANALYTICS

3Q 2020

- OTT Service Trials (2017 2020)
- OTT Service Trials (2019 2020)
- OTT Service Trial Conversions (2019 2020)
- New Subscriptions to Online Video Services During COVID-19 (Q2/20)
- Reasons for Online Video Service Subscription During COVID-19 (Q2/20)
- Use of Transactional OTT Services
 During COVID-19 (Q2/20)

Video Service Cancellations

- Video Service Cancellation During COVID-19 (Q2/20)
- Traditional Pay-TV Cancellations (Q2/20)
- Online Pay-TV Cancellations (Q2/20)
- Reasons for Cancelling Pay-TV Services (Q2/20)
- Intention to Cancel Pay-TV Services After COVID-19 (Q2/20)
- Impact of Sports League Closures on Future Pay-TV Cancellations (Q2/20)
- Expected Timeline for Sports League to Resume (Q2/20)
- Likelihood of Re-subscribing to Pay-TV Service (Q2/20)
- Impact of Reduced Content Pipeline on Future Cancellations (Q2/20)
- Online Video Service Cancellation During COVID-19 (Q2/20)
- Reasons for Cancelling OTT Services (2019 - 2020)
- Drivers to Retain Online Video Service Subscribers (Q2/20)
- Intentions to Cancel Newly Started Video Services After COVID-19 (Q2/20)

Most Enjoyed Video Content (2020 vs. 2019)

Appendix





SERVICE: CONSUMER ANALYTICS

3Q 2020

ATTRIBUTES

Parks Associates 5080 Spectrum Drive Suite 1000W Addison TX 75001 parksassociates.com sales@parksassociates.com PHONE 972.490.1113 Toll free 800.727.5711 FAX 972.490.1133

Authored by Kristen Hanich, Sharon Jiang, Yilan Jiang, and Xiaofan Tan Executive Editor: Jennifer Kent

Published by Parks Associates

© 2020 Parks Associates | Addison, 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.

