

# US Media Spotlight Service

## A Service Complementing the Media & Entertainment Service Area Package

In-depth coverage of the US Media market, aggregating data from across Omdia's Media and Advertising services portfolio. Comprehensive view of Pay TV and online video market as well as channels and consumer preferences is supplemented with zip-code level data on pay TV subscribers, channel availability and pricing.

“ The US is a dynamic marketplace, the largest media market in the world; where the US leads today the rest of the world will follow tomorrow. Our clients use US Media to help drive their strategies, and to help future-proof their businesses. ”

**Erik Brannon**  
Principal Research Analyst

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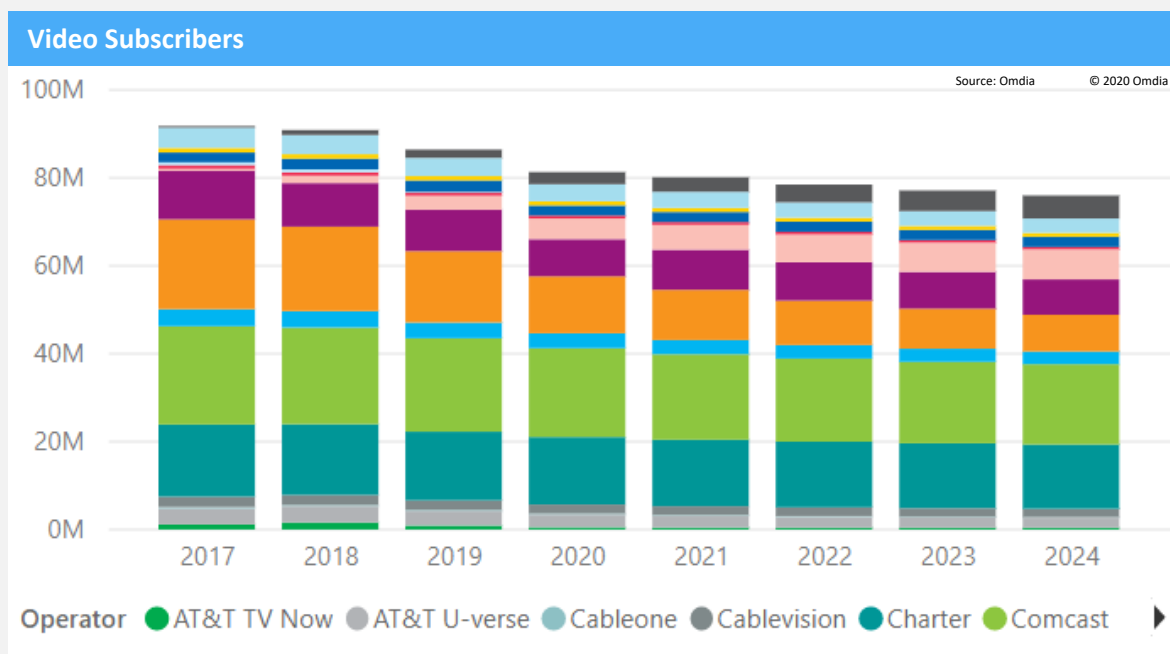
## HOW OMDIA HELPS YOU

- See wholistic picture of the US media and advertising market
- Analyze Pay TV market at zip-code level
- Leverage consumer surveys to understand the interplay between device ownership, pay TV and online video subscriptions and media consumption

## KEY QUESTIONS ADDRESSED

- What are the subscriber and revenue forecasts for the US Media market for the next five years?
- How are carriage and retransmission fees trending over time?
- How does service level availability vary by zip code?
- Do cord-cutters turn to virtual Pay TV operator services?
- What drives Pay TV and online video subscription services uptake and churn?

US Pay TV subscribers



# US Media Spotlight Service: Meet the Analysts



**Marija Masalskis**  
Senior Principal Analyst,  
TV, Video & Advertising



**Erik Brannon**  
Principal Research Analyst,  
TV & Online Video



**Sarah Henschel**  
Senior Analyst,  
TV & Online Video



**Harold Vargas**  
Senior Analyst,  
Channels, Programming &  
Advertising

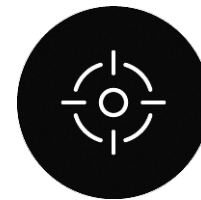
# US Media Spotlight Service: Deliverables



## DATABASES

—Annual—

- US Media Landscape Database
- US Service Provider Zip Code Availability Database/ Viz Tool
  - US Channel Lineup Availability Database/ Viz Tool



## SURVEYS

—Bi-annual—

Bi-annual devices, media and usage consumer survey with Viz Tool



## REPORTS

—Annual—

North America Pay TV and Online Video Market Monitor Series



## ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more.



## ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique questions.

# US Media Spotlight Service: Data Components

## US Media Landscape Tool

Consolidated data source for US subscriber and revenue data for advertising, broadband, cinema, mobile, online video, telephony and TV, cable network and channel revenue (including affiliate and carriage data), programming spend and trends by group and content type; home entertainment and the broader US connected devices landscape and installed base. Data is presented in excel based pivot tables with flat data.

### DETAILS

**Frequency:** Quarterly

#### Measures

- Subscribers
- Admissions
- Transactions
- Units Sold
- Revenue
- Price
- ARPU
- Carriage fees
- Retransmission fees
- Programming spend
- Installed base

### COVERAGE

- Pay TV
- OTT video
- Channels revenue
- Programming spend (original, acquired and sport)
- Connected Devices
- Operator Multiplay Services
- Games
- Cinema
- Physical and online video retail and rental
- Advertising

### SAMPLE QUESTIONS

- How are key OTT video services like Netflix and Amazon Prime performing?
- How does online channel ARPU compare to traditional Pay TV ARPU?
- How many addressable devices are there for video OTT services?
- How does cable operator pay TV revenue compare to their broadband and telephony revenue streams?

### EXCEL BASED PIVOT TABLES WITH FLAT DATA

Delivery	Media	Measure Type	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010
Online	Games	Revenue (\$m)	68.0	134.4	269.3	480.8	878.4	1,218.6	2,036.2	3,141.7	4,079.8	5,279.4	
Online	Games	Spend (\$m)	68.0	134.4	269.3	480.8	878.4	1,224.4	2,047.8	3,167.2	4,120.1	5,367.5	
Online	Games	Subscribers (m)	0.7	1.3	2.5	3.2	4.9	6.4	9.8	12.3	15.6	18.1	
Online	Games	Transactions (m)				0.0	0.6	4.2	11.9	21.0	28.0	42.7	

Operator	Revenue Type	Year	1996	1997	1998	1999	2000	2001
Amazon	Subscription							
AT&T U-Verse TV	On demand							
AT&T U-Verse TV	Subscription							
Cable Others USA	On demand		998.879	807.195	640.724	194.319	237.704	
Cable Others USA	Subscription		20,788.705	20,988.875	16,453.558	13,874.843	13,795.504	

# US Media Spotlight Service: Data Components

## US Service Provider Zip Code Availability Database

This database provides TV, broadband and cable voice service availability by state and zip code. Further details on technical reach, broadband speed and subscriber demographics are available. Data is presented in an interactive dashboard and visualization tool with CVS file download option.

### DETAILS

**Frequency:** Bi-annual

**Measures**

- Subscriptions
- Homes passed
- Broadband Speeds
- Household demographics

**Geographic granularity**

- State
- Zip Code

### COVERAGE

**Media and access services**

- Pay TV
- Broadband
- Telephony

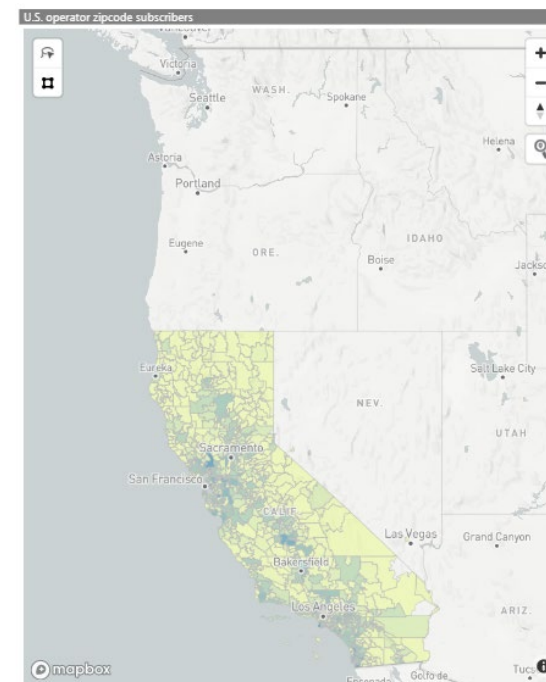
**Platforms**

- Cable
- Satellite
- IPTV

### SAMPLE QUESTIONS

- What states and major metro areas are served by pay TV operator?
- What is the number of TV/broadband/voice subscribers by zip code for pay TV operators?
- Which broadband providers/speeds/types are available by zip code?
- What are the demographic household characteristics of an operator coverage area?

### VISUALIZATION TOOL WITH CVS DOWNLOAD OPTION



# US Media Spotlight Service: Data Components

## US Channel Line up Availability Database

This first of its kind database provides the ability to look at channel carriage at a state, city, metro area and zip code level. It provides the most comprehensive look at channel carriage ever created. Data is presented in an interactive query tool with CSV file download option.

### DETAILS

**Frequency:** Bi-annual

#### Measures

- Channel
- Operator
- Package
- Pricing
- Genre
- Definition

#### Geographic granularity

- State
- Zip Code

### COVERAGE

#### Platforms

- Cable
- Satellite
- IPTV
- Online (Virtual)

#### Channel groups (non-exhaustive)

- A&E
- AMC
- CBS
- Discovery
- Disney
- Fox Corporation
- HBO
- NBC
- Turner
- Viacom

### SAMPLE QUESTIONS

- Where are channels available, what operators carry them, and in what tier?
- Which channels are carried most frequently by operators?
- Which channels are available to key demographics like, income, age, race?

### INTERACTIVE QUERY TOOL

Year	State	Zip	Platform	Operator	Package Name	Package Type	Package Price	Channel Brand
2019	CA	93933	Online	AT&T TV Now	Choice	Tier	\$110/mo	A Wealth of Entertainment
2019	CA	93933	Online	AT&T TV Now	Ultimate	Tier	\$135/mo	A Wealth of Entertainment
2019	CA	93933	Online	AT&T TV Now	Xtra	Tier	\$124/mo	A Wealth of Entertainment
2019	CA	93933	Online	AT&T TV Now	Choice	Tier	\$110/mo	A&E
2019	CA	93933	Online	AT&T TV Now	Entertainment	Tier	\$93/mo	A&E
2019	CA	93933	Online	AT&T TV Now	Optimo Mas	Tier	\$86/mo	A&E
2019	CA	93933	Online	AT&T TV Now	Ultimate	Tier	\$135/mo	A&E
2019	CA	93933	Online	AT&T TV Now	Xtra	Tier	\$124/mo	A&E
2019	CA	93933	Online	AT&T TV Now	Choice	Tier	\$110/mo	AccuWeather
2019	CA	93933	Online	AT&T TV Now	Entertainment	Tier	\$93/mo	AccuWeather
2019	CA	93933	Online	AT&T TV Now	MAX	Tier	\$70/mo	AccuWeather
2019	CA	93933	Online	AT&T TV Now	Optimo Mas	Tier	\$86/mo	AccuWeather
2019	CA	93933	Online	AT&T TV Now	PLUS	Tier	\$50/mo	AccuWeather
2019	CA	93933	Online	AT&T TV Now	Ultimate	Tier	\$135/mo	AccuWeather
2019	CA	93933	Online	AT&T TV Now	Xtra	Tier	\$124/mo	AccuWeather
2019	CA	93933	Online	AT&T TV Now	Choice	Tier	\$110/mo	AMC
2019	CA	93933	Online	AT&T TV Now	Entertainment	Tier	\$93/mo	AMC
2019	CA	93933	Online	AT&T TV Now	Optimo Mas	Tier	\$86/mo	AMC
2019	CA	93933	Online	AT&T TV Now	Ultimate	Tier	\$135/mo	AMC
2019	CA	93933	Online	AT&T TV Now	Xtra	Tier	\$124/mo	AMC
2019	CA	93933	Online	AT&T TV Now	Ultimate	Tier	\$135/mo	American Heroes Channel
2019	CA	93933	Online	AT&T TV Now	Xtra	Tier	\$124/mo	American Heroes Channel
2019	CA	93933	Online	AT&T TV Now	Choice	Tier	\$110/mo	Animal Planet
2019	CA	93933	Online	AT&T TV Now	Entertainment	Tier	\$93/mo	Animal Planet
2019	CA	93933	Online	AT&T TV Now	Optimo Mas	Tier	\$86/mo	Animal Planet
2019	CA	93933	Online	AT&T TV Now	Ultimate	Tier	\$135/mo	Animal Planet
2019	CA	93933	Online	AT&T TV Now	Xtra	Tier	\$124/mo	Animal Planet
2019	CA	93933	Online	AT&T TV Now	AT&T TV NOW ESPAÑOL	Add-on	\$15/mo	Antena 3 TV
2019	CA	93933	Online	AT&T TV Now	Optimo Mas	Tier	\$86/mo	Antena 3 TV

# Consumer Surveys

## Consumer Survey with Visualization Tool and Excel Files

A consumer-centric product highlighting the dynamics between multi-device clustering & media consumption to ascertain addressable bases

### DETAILS

**Frequency:** Bi-annual

#### Measures

- 2 waves per year (Q2 and Q4)
- Nationally representative of internet users by age and gender interlocked, as well as region and employment status
- Statistically significant sample for each country
- Online adults aged 18-64

#### Countries

- US, UK, France, Germany, Japan, Brazil, India surveyed twice a year
- “Sponsor a country” option available for additional countries

### COVERAGE

**Approximately 80 questions, of which majority asked twice a year to allow trend analysis**

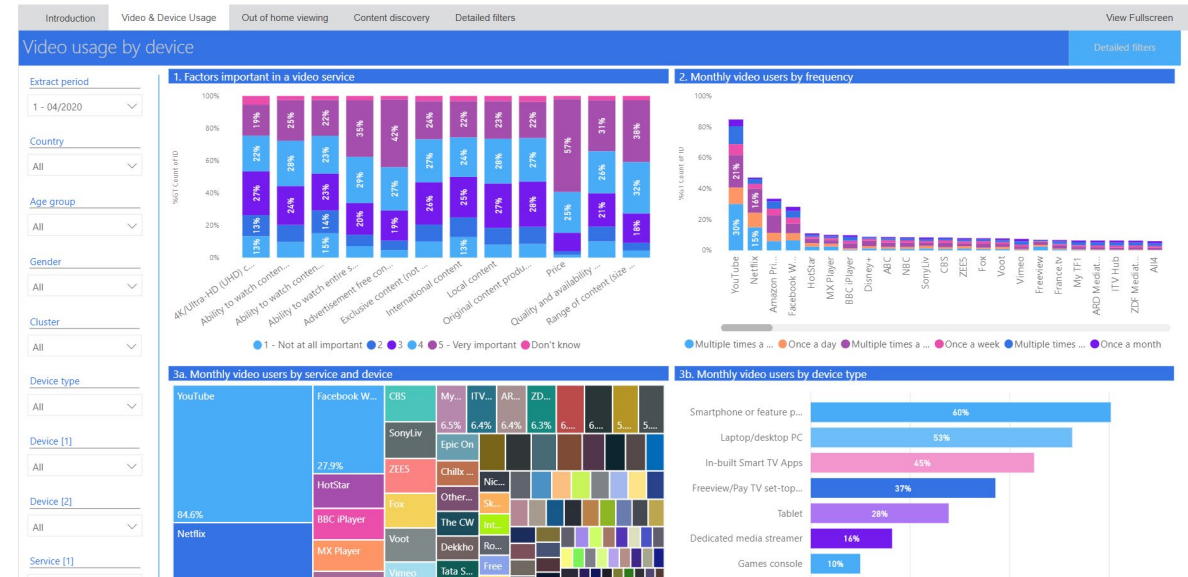
- **Demographic splits:** 12 questions to help segment respondents
- **Devices adoption and usage:** split by 130+ device types/ brands
- **TV & Online Video uptake and usage:** Pay TV, SVOD, TVOD & AVOD services
- **Usage of devices & video services:** usage of video services by device brand, including preferences, consumer perceptions and service ratings

## Visualization Tool: Interactive Dashboard

An interactive data visualization tool to allow clients to easily explore and extract survey results.

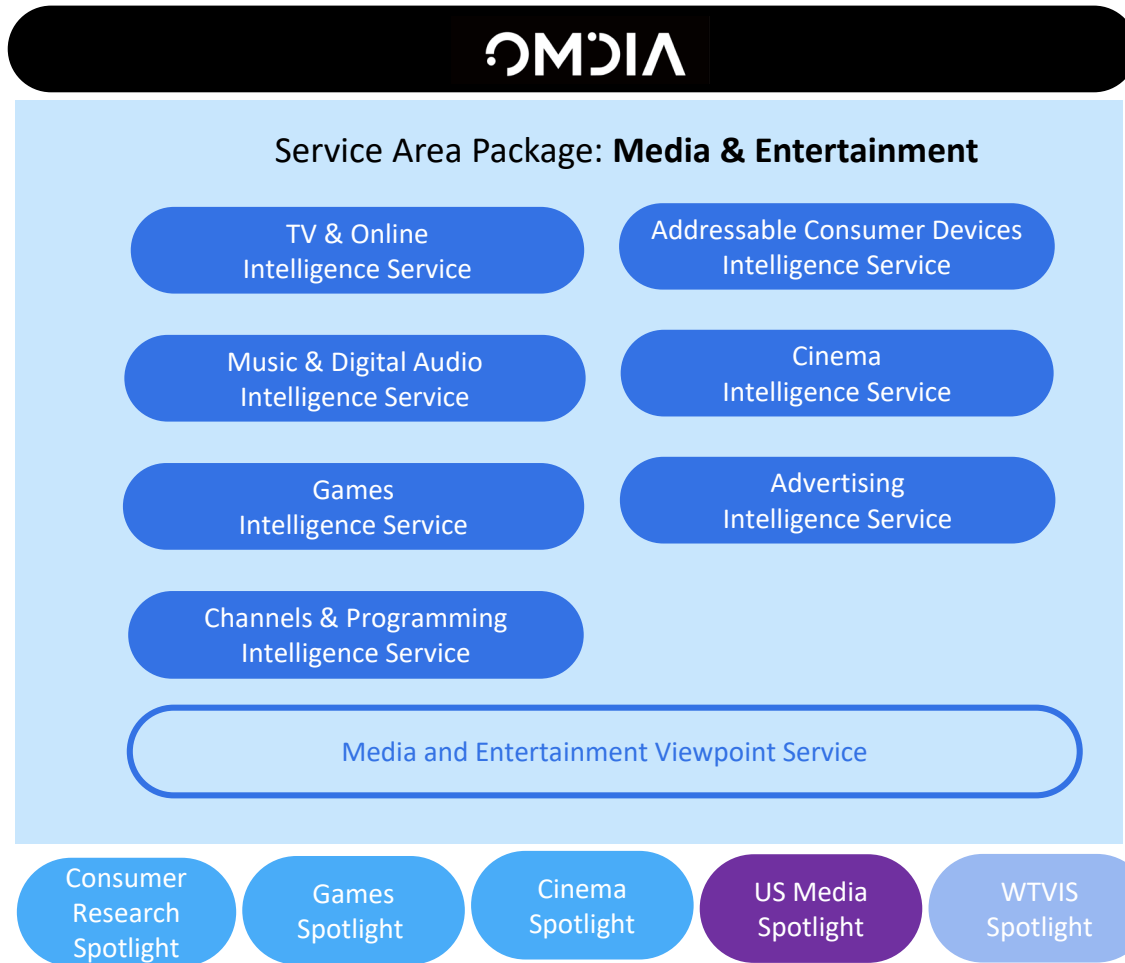
The tool allows clients to analyze the relationship between survey questions/charts, with the ability to drill down and filter results for added granularity.

Consumer Research - Devices, Media & Usage Database - Usage - H1 2020





# Related Content: Media & Entertainment Service Area Coverage



## About Omdia’s Media & Entertainment Research

Omdia’s Media & Entertainment portfolio provides forecasts, consumer survey data, competitive analysis and qualitative insights about the world’s largest, fastest-growing and dynamic markets. The team’s coverage provides a joined-up view of unrivalled depth and breadth across the sector’s most important geographies, technologies and companies.

Clients receive access to a team of over 35 analysts, each with specialized expertise and organized to address critical intersections in the rapidly converging media and entertainment market. The team is supported by an array of Omdia colleagues specializing in adjacent domains, such as mobile, broadband, devices, cloud, digital consumer services and media delivery.

# Related Content: Digital Consumer Services Service Area Coverage



## Service Area Package: **Digital Consumer Services**

Broadband, Bundling & Pricing  
Intelligence Service

Smart Home  
Intelligence Service

Advanced Messaging &  
Communications Intelligence Service

Digital Consumer Platforms  
Intelligence Service

Digital Consumer Operator Strategy  
Intelligence Service

Consumer AI  
Intelligence Service

Digital Consumer Services Viewpoint Service

Broadband Pricing  
Spotlight Service

## About Omdia's Digital Consumer Services Research

Omdia provides expert analysis and data across Digital Consumer Services with unique coverage of service providers', over the top players', and major tech platforms' activity in this space. We can help identify which markets and offerings are driving growth in Digital Consumer Services, understand the strategies of key competitors and customers, and assess the impact of this rapidly evolving market across different businesses.

Our global team of analysts provides expertise on service provider and tech company strategy across Digital Consumer services including: broadband and bundling, messaging and communications, consumer platform strategies, digital operator services, app ecosystems, payments and commerce, smart home, and consumer AI.

### Custom Solutions

Omdia's consulting services offer a true end-to-end service capability across all aspects of your product lifecycle, from concept and product development, to go-to-market and sales effectiveness. **Contact us** if you have a project that you would like to discuss with a member of the team.

# Our “Ask an Analyst” Service Provides Best in Class Customer Support

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

## Draw on our expertise

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:



**Tom Coate**  
Customer Success  
Manager



**Kâren Dyer**  
Customer Success  
Manager



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### Customer Success

E: [customersuccess@ondia.com](mailto:customersuccess@ondia.com)

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### SALES

US: +1 (212) 652 5335

APAC: +61 (0)396 016 700

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### ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio\*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

\* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.