

Pay TV Customers Want To Be Free of Equipment Rental Fees

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Report Length: 34 pages

Executive Overview. Whether it's improving customer satisfaction or stemming subscriber churn, one specific strategy stands out above the rest – *eliminating equipment rental fees*. The findings paint a clear picture: fees charged for renting set-top boxes, DVRs and modems/routers continue to have a strong negative effect on the overall pay TV customer experience.

Removing contract requirements and offering scaled-down TV channel packages are other strategies for traditional TV providers to engage at-risk customers.

The latest survey, completed September 21, of 3,478 primarily North American respondents from 451 Research's *Leading Indicator* panel focused on key measures within the traditional pay TV and streaming/OTT market.

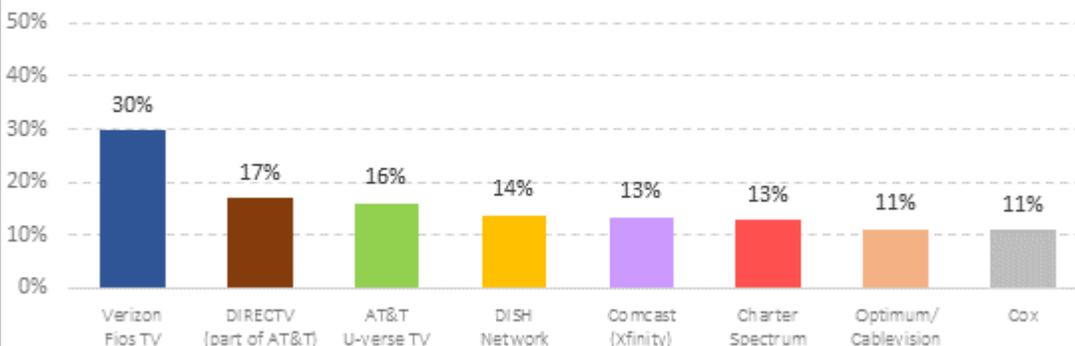
Excerpt of Full Report

Customer Satisfaction. Verizon Fios (30% *Very Satisfied*) continues to lead Traditional Pay TV providers in customer satisfaction. DIRECTV (17%) is a distant second.

Customer Satisfaction Ratings by Individual Pay TV Provider

Sep 2017

% of subscribers who say they are Very Satisfied with their TV Service Provider



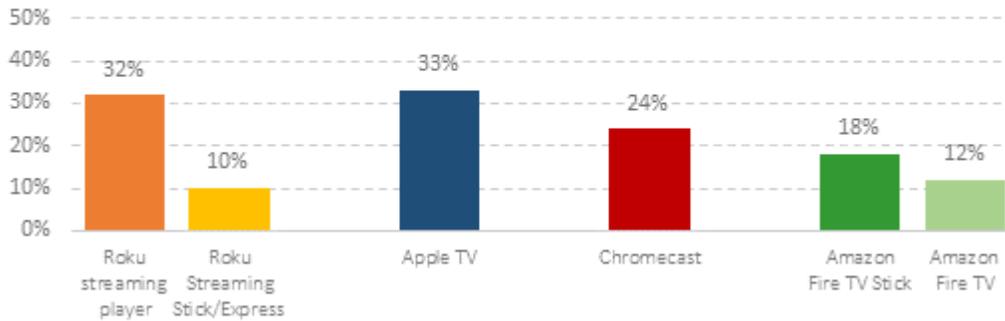
Source: 451 Research's VoCUL: TV Industry Trends (Leading Indicator Survey), Sep/Jun 2017

Streaming Devices. Roku players/sticks lead in current use, with the company recently refreshing its product lineup as well as launching its ad-supported free movie channel, 'The Roku Channel.' Apple, which launched the 4K Apple TV in late September, is a strong second.

Current Use - Streaming Devices

Sep 2017

Which of the following streaming media devices do you use to stream online video content?



Source: 451 Research's VoCUL: TV Industry Trends (Leading Indicator Survey), Sep/Jun 2017

Report details also include:

- Traditional Pay TV – Customer Satisfaction and Loyalty
- Top Promotions and Customer Retention
- Paid Streaming Services
- Streaming TV Bundles
- Impact of Streaming on Pay TV Churn
- Streaming Devices and Smart TVs

VoCUL: Research Methodology

This report presents the findings of recent surveys on trends driving the TV industry: TV Service Provider survey of 3,478 US and Canadian respondents, conducted August 30-September 21, 2017 (n=1,723) and June 2-20, 2017 (n=1,755).

451 Research's Leading Indicator panel is a group of 25,000 accredited business and technology professionals – as well as early adopter consumers – who work in companies across a range of industries. The surveys measure the pulse of consumer and business spending via weekly demand-based tracking surveys, and converts the information into a series of proprietary quantitative and qualitative reports.

The intelligence gathered provides a real-time view of companies, technologies, and key market sectors, along with an in-depth perspective of the macro economy – well in advance of other available sources.

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