amino

Voice of Customer 2020

Amino has over 250 small to mid-size Pay TV operator customers in North America, Europe, Latin America and the Caribbean. They are uniquely focused on delivering their customers the best possible video services.

We reached out to our customers via a survey and one-to-one conversations to understand the state of their video services and how they are responding to the evolution of the Pay TV industry. They continue to put their customers front and center even as they face some familiar... and some emerging ‘challenges.

Operator Challenges

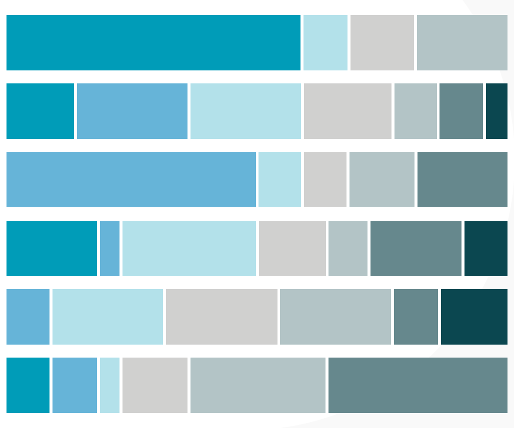
The cost of content continues to be the most significant challenge, while addressing the needs of a demographically diverse subscriber base and their specific support challenges are a distant 2nd or 3rd place. Interestingly there is low concern about competition from national Pay TV providers or OTT/D2C providers.

- 91% Content Costs
- 46% Serving needs of Diverse Subscriber Base
- 41% Customer Support
- 14% Competition from National Pay TV
- 9% Competition from OTT/D2C

Percentage of respondents who responded on a scale of 1-5, with the challenge being a 1 or 2, with 1 being the highest priority challenge

Subscriber Priorities

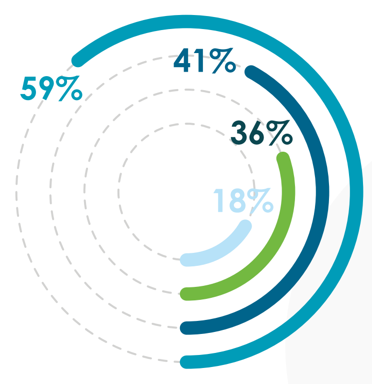
Consistent with last year’s results, price continues to be the top priority, with content access and packaging following behind.



Operator Priorities

Given operator challenges combined with subscriber priorities, it is no surprise that many operators are focused on integrating OTT content into their current video services.

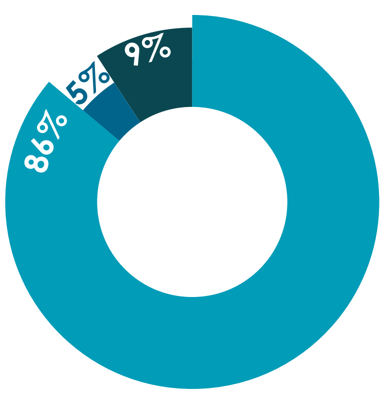
Percentage of respondents who responded on a scale of 1-5, with the challenge being a 1 or 2, with 1 being the highest priority challenge



- Integrating OTT Content
- Improve Customer Service
- Improving the User Interface
- Monitor and Manage In-home WiFi

Linear TV is not DEAD!

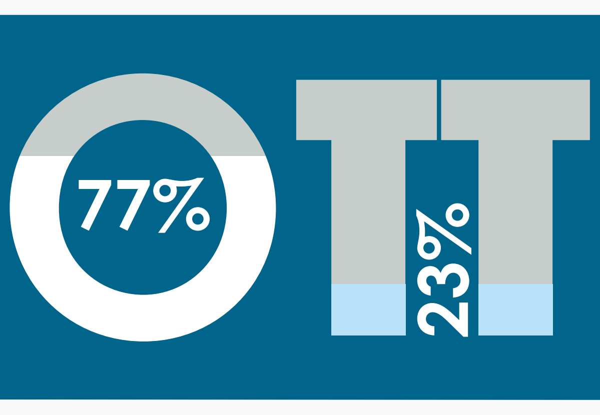
Our operator customers are generally still committed to providing linear TV as this is what their subscribers still want. Of those that indicated an interest in turning off linear services, most do not have active plans to do so.



- No plans to turn off linear TV service
- Intention to turn off linear service but no plan
- Plan to turn off linear TV service

OTT is Friend not Foe

When asked about the competitive environment specific to OTT video services, operators clearly felt that OTT was complementary to existing linear video offerings.

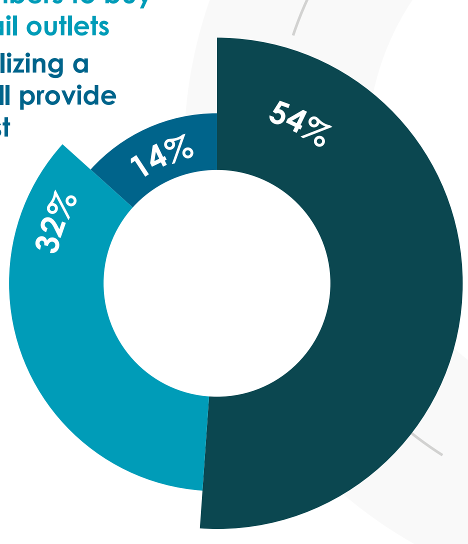


- OTT will supplement existing services
- OTT will replace existing services

Bring Your Own Device (BYOD)

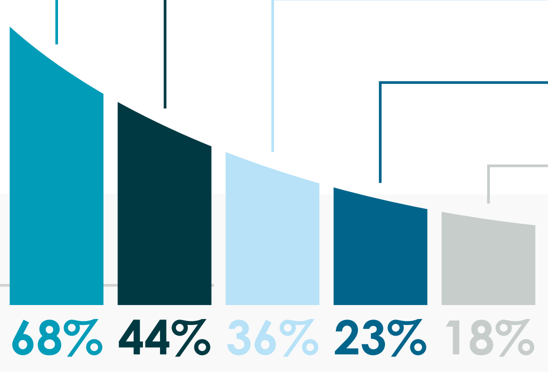
While BYOD is the mantra of all OTT and vMPVD providers, it is still in the early adopter phase at Pay TV operators. Respondents who are not formalizing a BYOD plan also do not have plans to turn off their linear service.

- No, we are not formalizing a BYOD plan
- Yes, we will identify approved devices for subscribers to buy online or from retail outlets
- Yes, we are formalizing a BYOD plan and will provide devices at no-cost to early adopters



Most Important OTT or vMVPD features

Content is very important to operators who are seeking partnerships with streaming providers.



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Interest in AndroidTV

Android TV enabled set-top boxes provides operators with enhanced capabilities.

83% of operators are interested in Android TV. Why? Seamless access to both linear and OTT content via one device

63% interested in access to linear and streaming content from the same device

50% interested in integrating video, gaming and media apps from Google Play Store

50% interested in operator branding

User Interface of increasing interest

The current mantra of content is king and UI is queen prompted us to ask our customers what was important to them relevant to the UI. 100% of operators surveyed indicated that a consistent user interface across any device is very important. When asked about other features, they focused on subscriber needs.

- 91% Ease of use by subscriber
- 50% Content search and discovery
- 32% Branding
- 18% Operator defined boot or zero screen
- 9% Ease of backend management
- 0% Recommendations

Percentage of respondents who responded on a scale of 1-5, with the challenge being a 1 or 2, with 1 being the highest priority challenge

Pay TV providers are laser focused on the needs of their subscribers even as they face increased competition.

They are engaged in a persistent evolution - aligned with fulfilling subscriber expectations when it comes to price, variety of content and the quality of service of their video service.

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