



amino

2021 VOICE OF CUSTOMER

Welcome to the results of Amino's 3rd Annual Voice of Customer Survey.

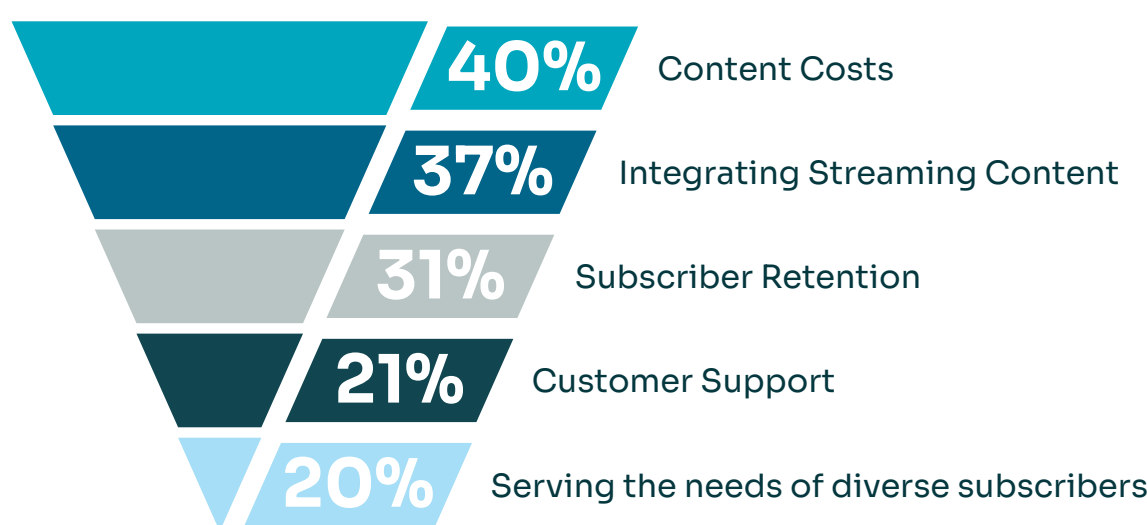
We reached out to our customer base of over 250 Pay TV operators to understand their video service challenges and priorities as the industry continues to evolve.

Their fundamental goal is to do more, with less. Subscriber demand for video content is front and center, even as operators consider more cost-effective methods of providing video.



Operator Challenges

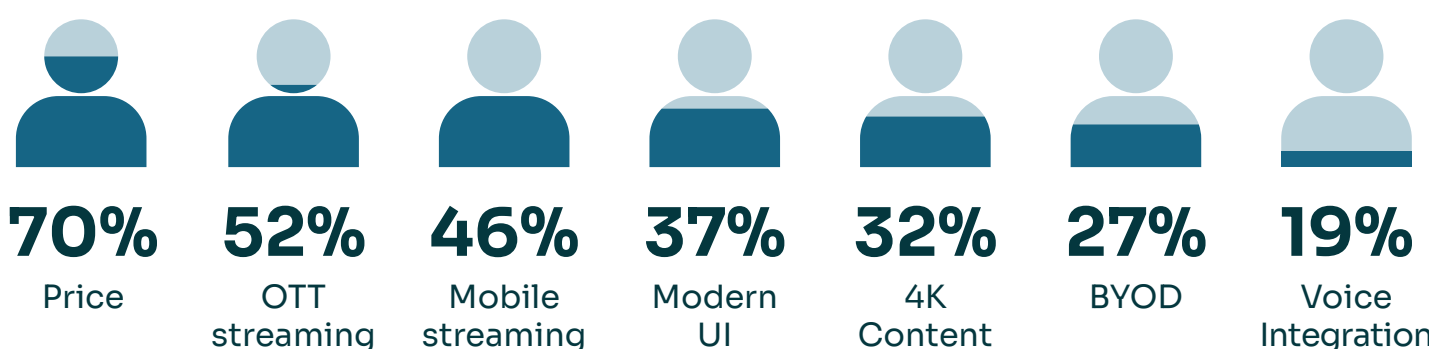
Content is the biggest pain point for operators when asked to prioritize their challenges.



Subscriber Priorities

With continued focus on subscriber retention, our operator customers pay close attention to what is most important to their video subscribers.

What is important to subscribers?



Pay TV providers want to strike a balance between reducing the cost of running a video service while still giving subscribers what they want.

Even as providers are actively seeking ways to reduce the costs of delivering the video content their subscribers want, they acknowledge that video is a compelling component of their service.

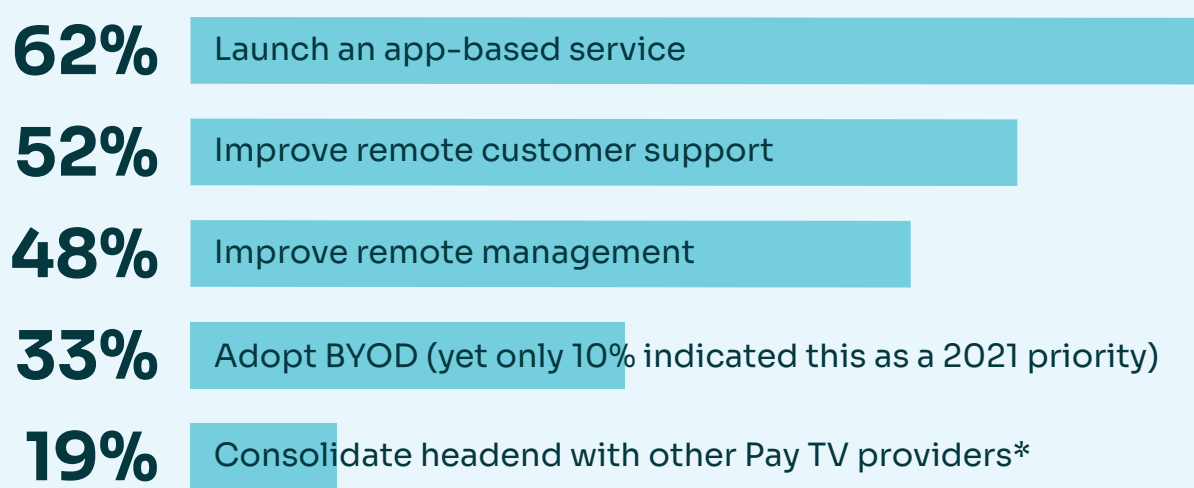


Operator Priorities

Reduce the cost of managing a video service

86% of operators prioritize reducing the cost of running a video service.

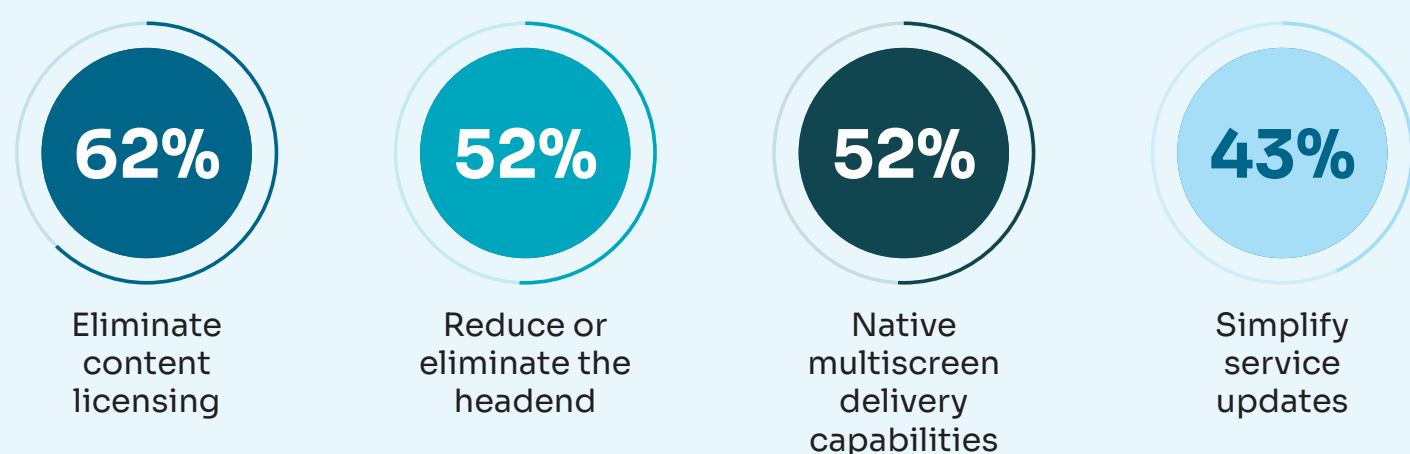
They are considering a variety of options:



*(not surprising as 52% indicated that reducing or eliminating headend infrastructure would make it easier to run their TV service)

What would make it easier for them to run their TV services? No surprise, eliminating content licensing!

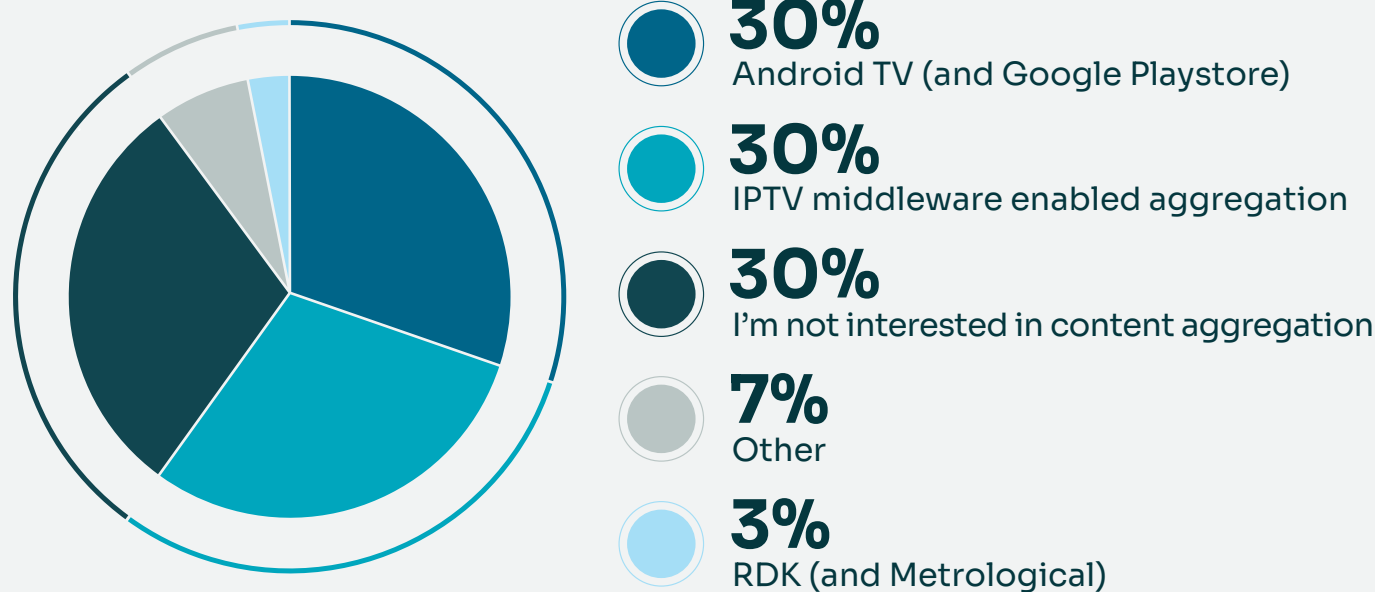
How to make it easier to run video service:



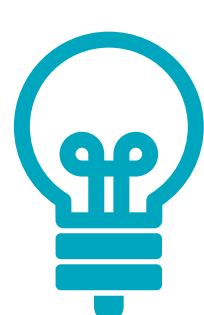
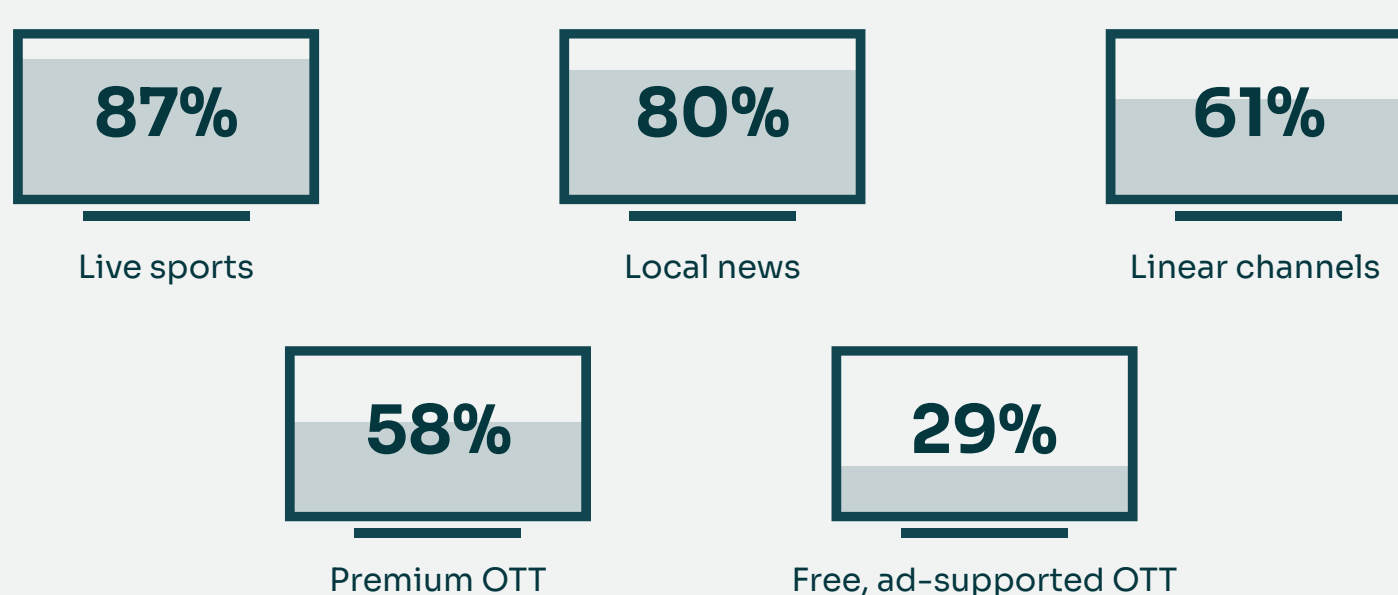
Integrate streaming content

71% of operators prioritize integrating streaming content.

How will they do this?



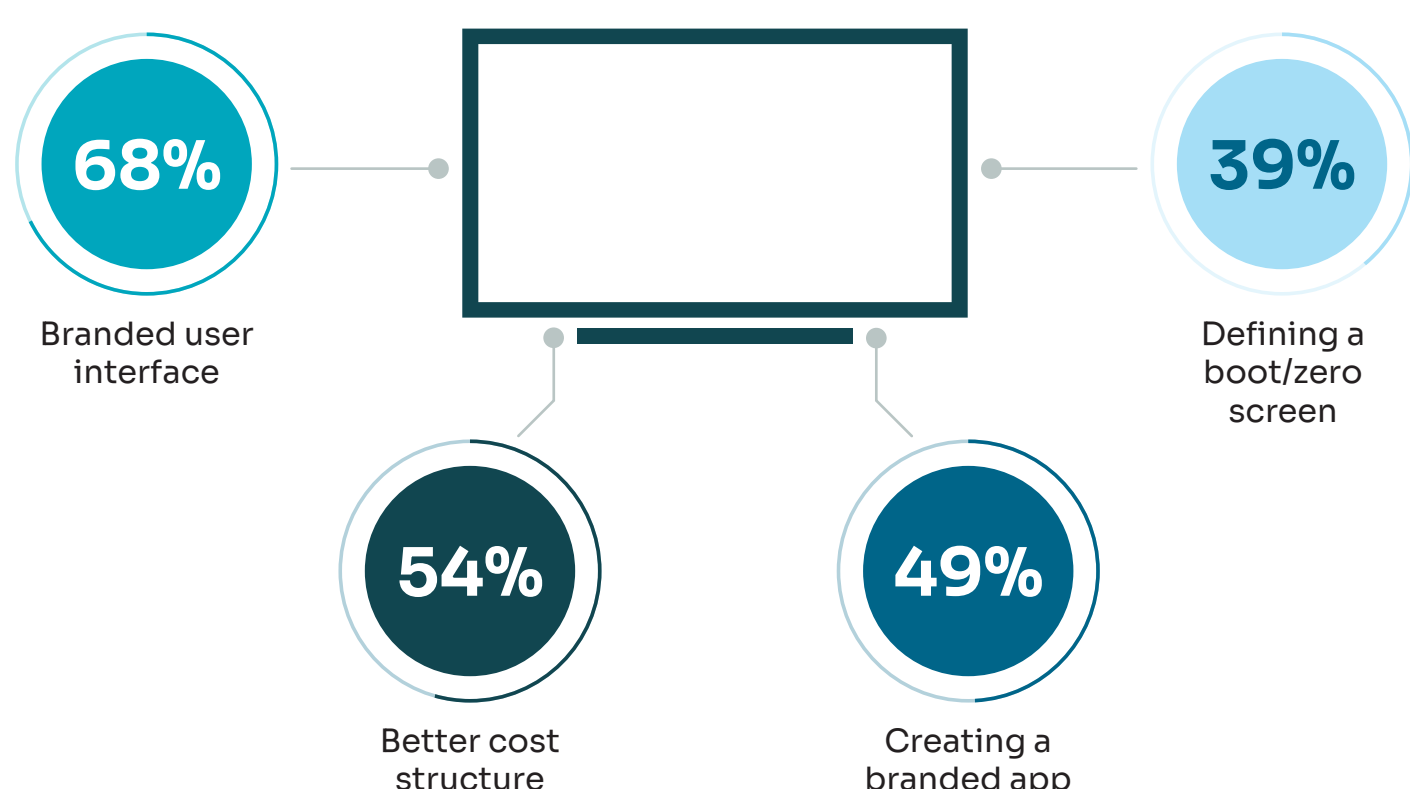
What content is most important to subscribers?



Features of an updated video service

As operators are figuring out the future of their video services, we asked what features were important in an updated service? Maintaining brand visibility is key.

Most important features for updated video service:

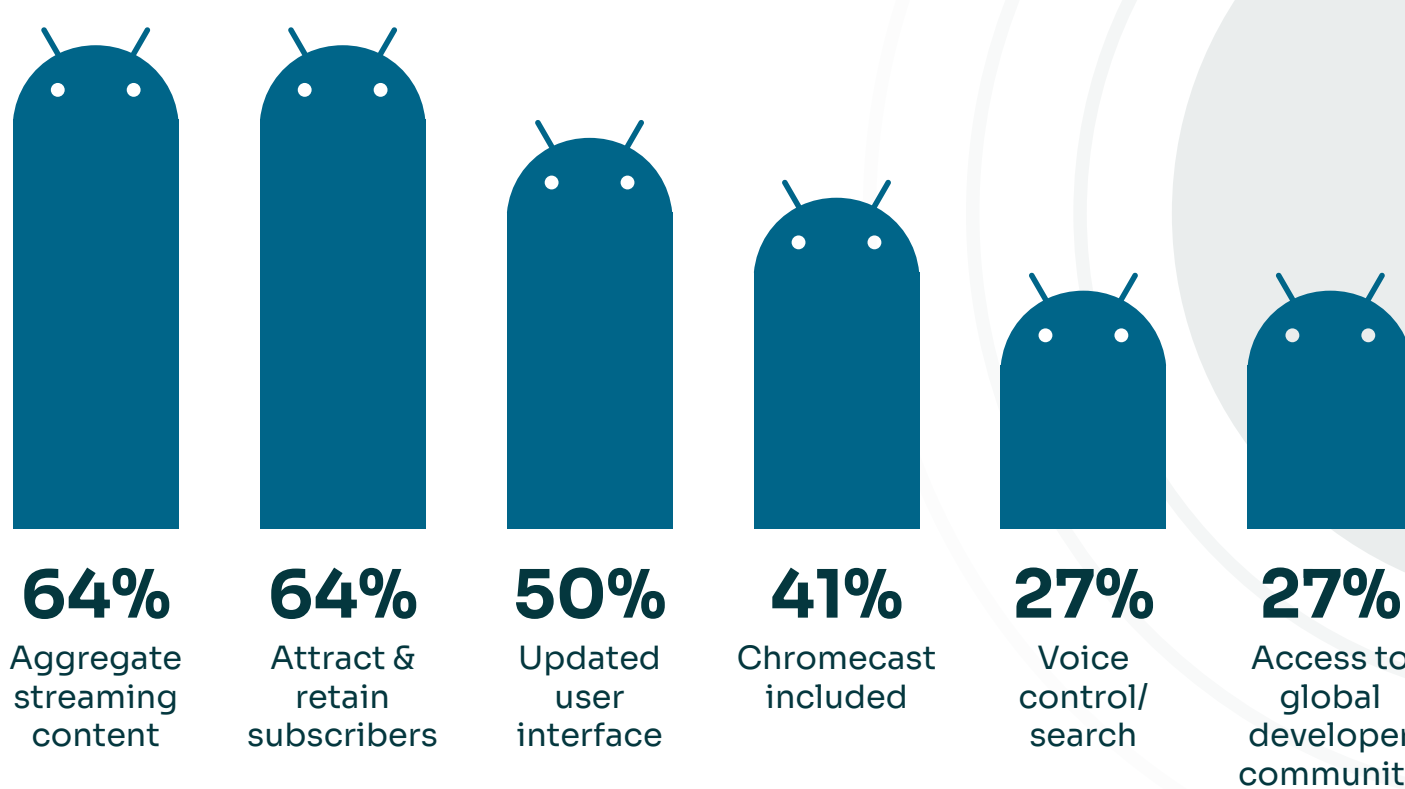


Interest in Android TV

Android TV continues to gain interest around the globe, with Rethink Technology Research indicating that by 2025, 29% of set-top boxes will use an Android TV operating system.

62% of our survey respondents indicated interest in Android TV.

Why are they interested?



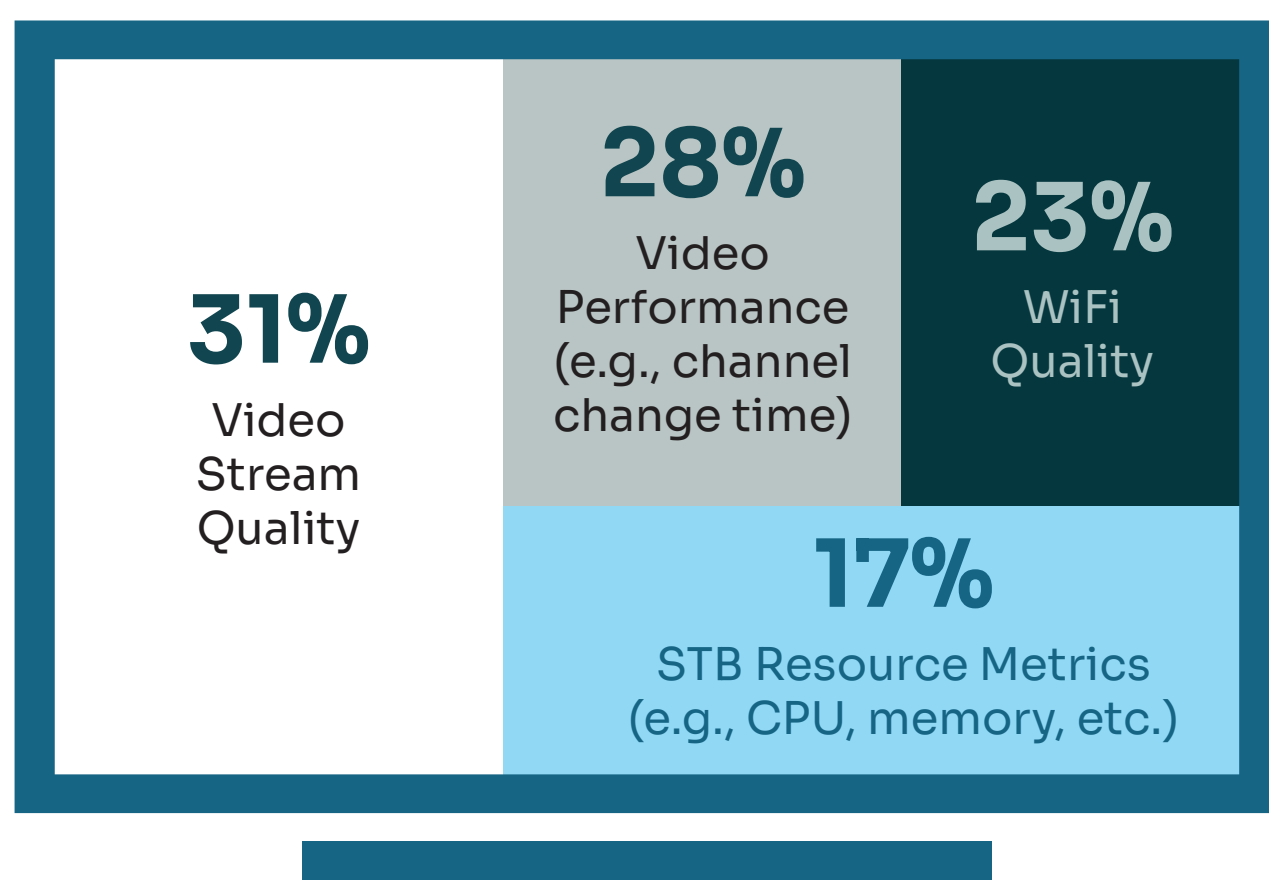
Data is key

As we know data is everywhere. Pay TV providers collect a wide variety of data throughout the delivery value chain. What data is most important to them? No surprise, the data that can differentiate Pay TV providers from OTT providers!

What data do operators want?

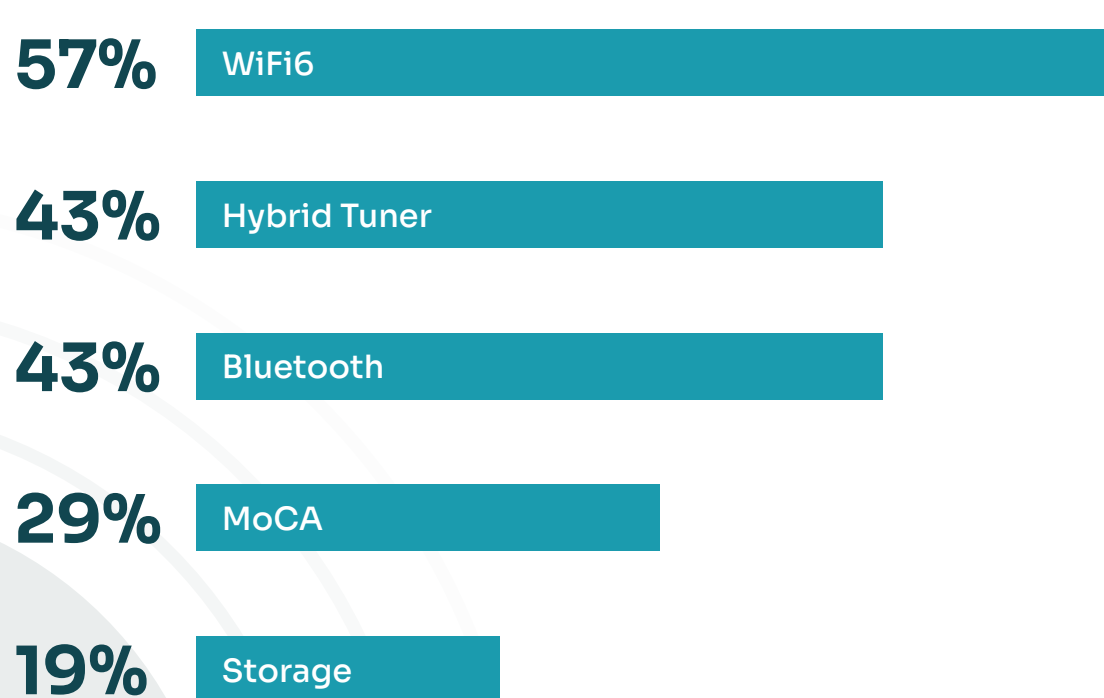


With service quality a top priority, we wanted to know which service quality metrics were most important.

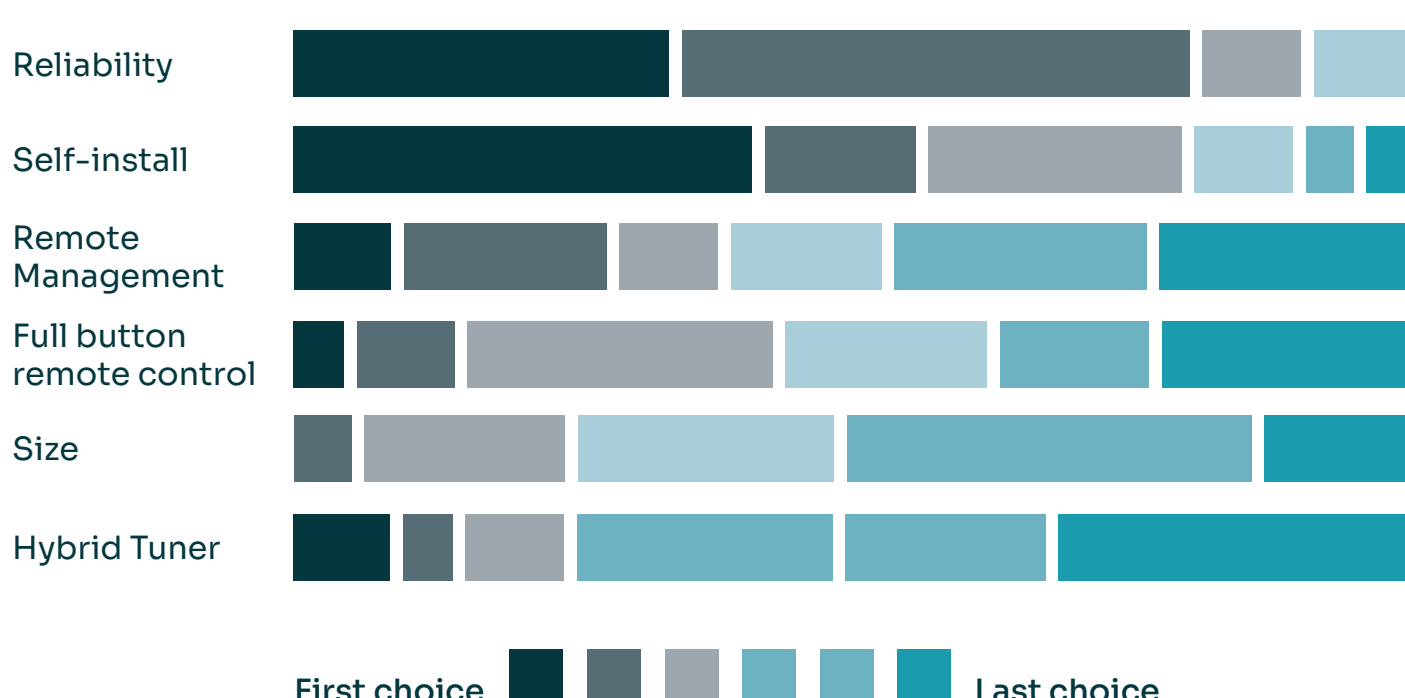


Set-top boxes

We asked which features our operator customers require in a set-top box. Their responses reflect the changes facing their video delivery service.



We also wanted to understand what was most valuable about the set-top box. Unsurprisingly, reliability and self-install top the list – both related to reducing truck rolls



This year, it is noteworthy to call out the importance of cost reduction for Pay TV providers. While they clearly understand subscriber priorities for accessing content at the right price point, they must address the economics of video delivery. Whether it is in the infrastructure that enables the service or the ongoing expense of delivering video to the home, our operator customers are seeking options to better manage their overall costs while still fulfilling subscriber expectations for a video service.

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