

2022 VOICE OF CUSTOMER

Welcome to the results of Amino's 4th Annual Voice of Customer Survey.

The results of our 4th Annual Voice of the Customer Survey reflect the ongoing priorities and challenges of small to mid-size Pay TV operators.

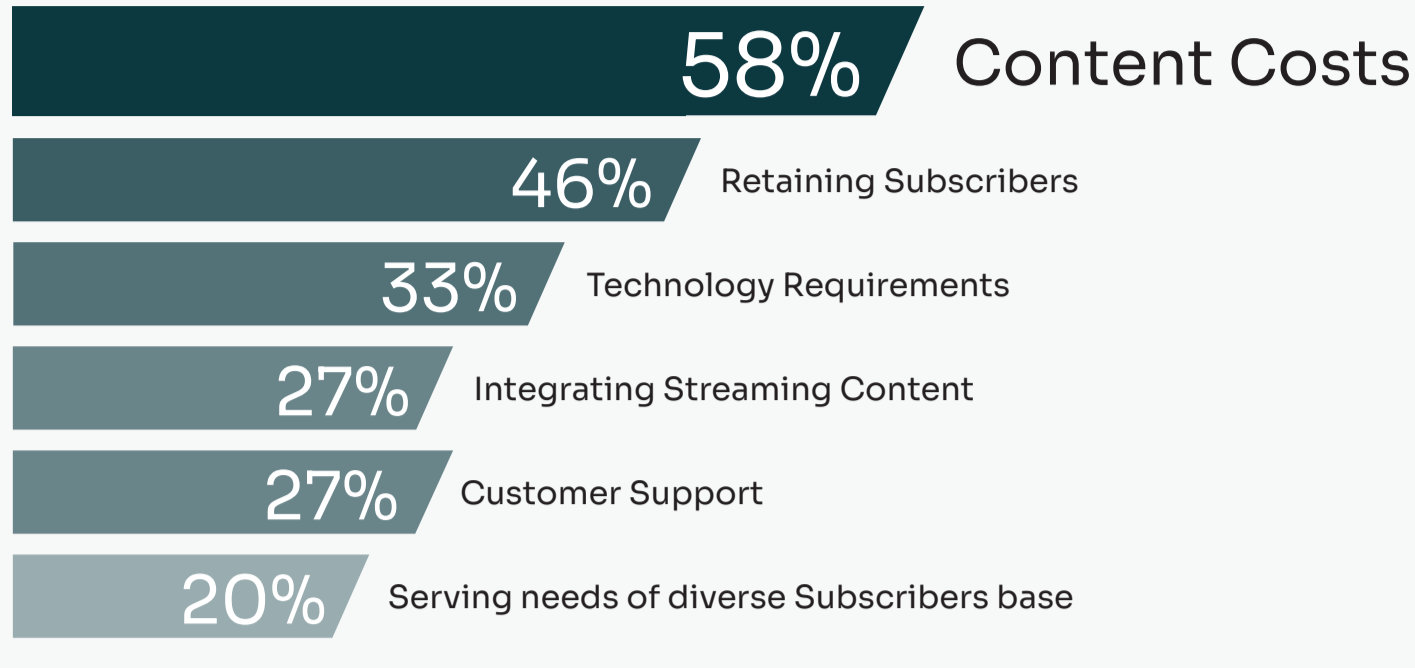
Our customer base, of over 250 operators, continues to struggle with the cost of content.

However, even as they consider options to reduce their operating costs, they are paying increased attention to protecting and preserving their brand.

CHALLENGES & PRIORITIES

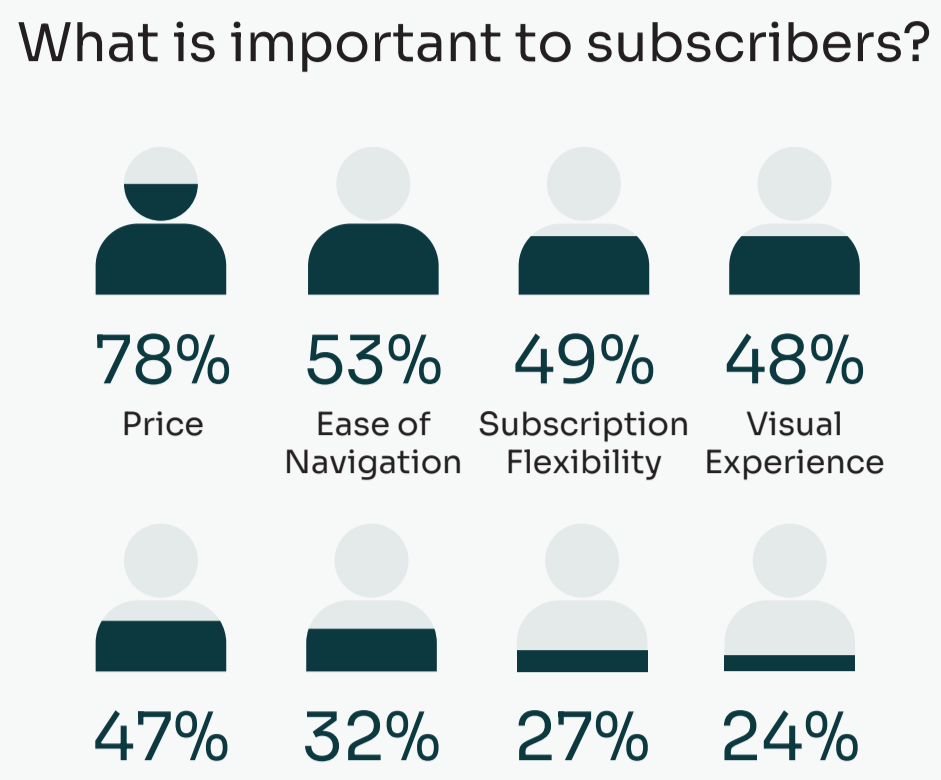
Operator Challenges

All operators reference content costs as an important challenge, with the percentage rating it as their top challenge increasing year over year.



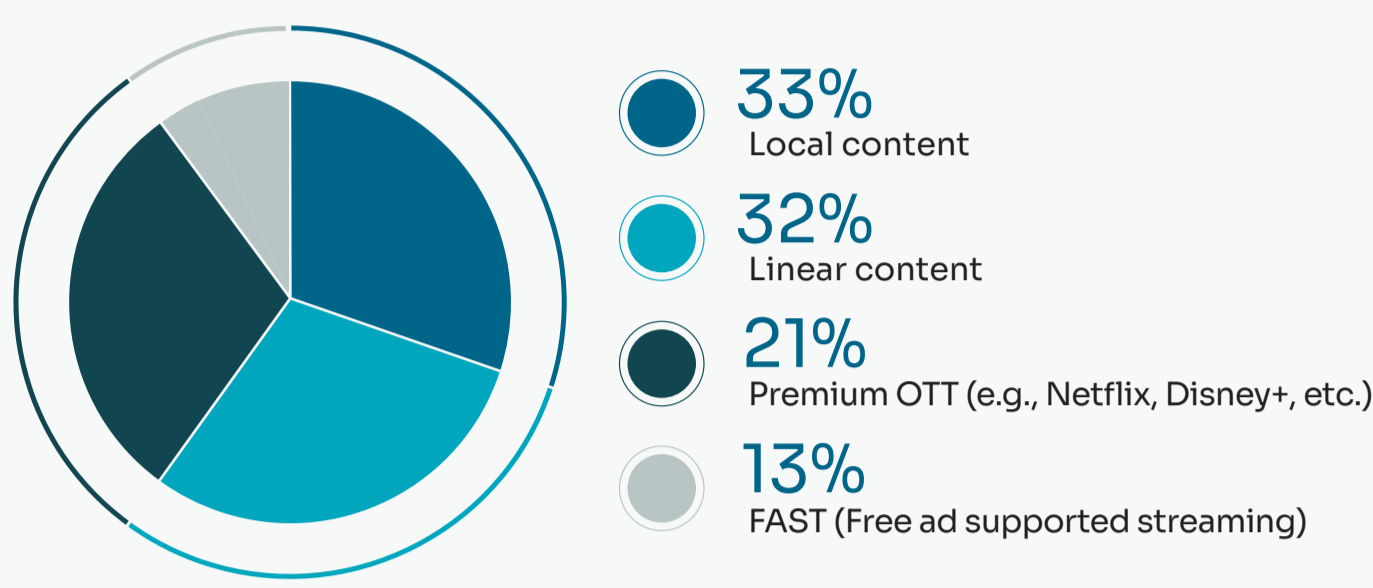
Subscriber Priorities

Cost is also important to their subscribers with 78% prioritizing price over user experience or alternate business models.



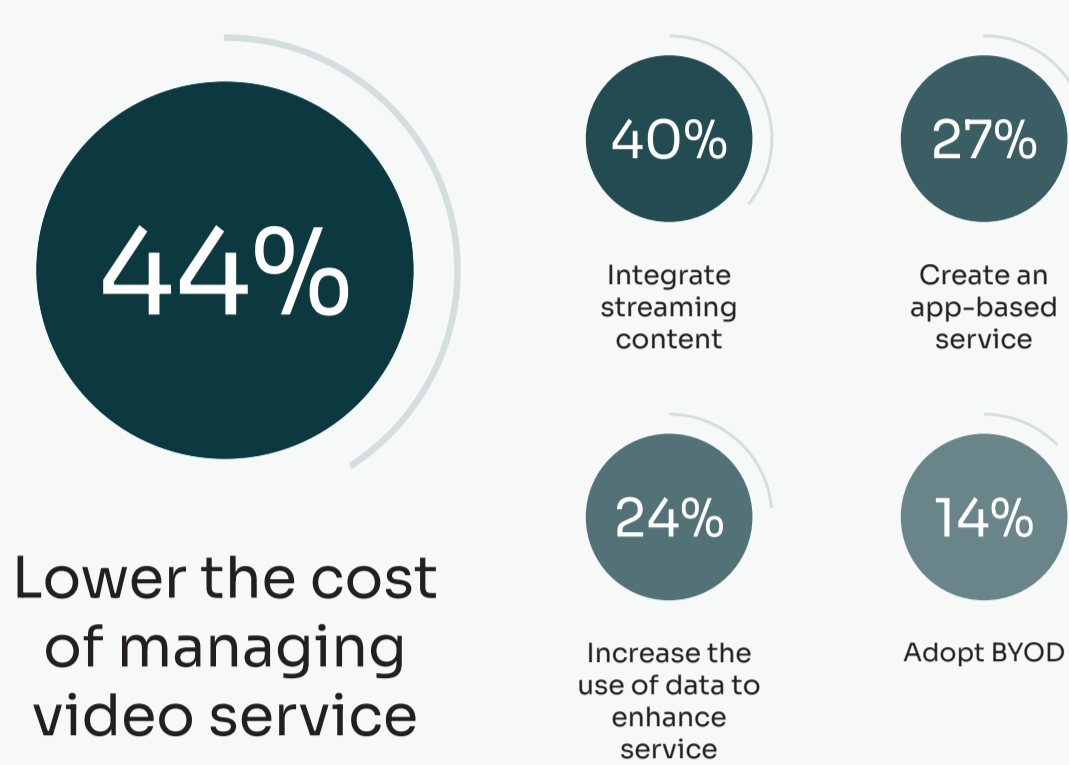
Content Priorities

The appeal of content that is easily available via their local service provider is one reason why Pay TV subscribers are not cutting the cord. It is no surprise that local and linear content top the list of content that is important to them.



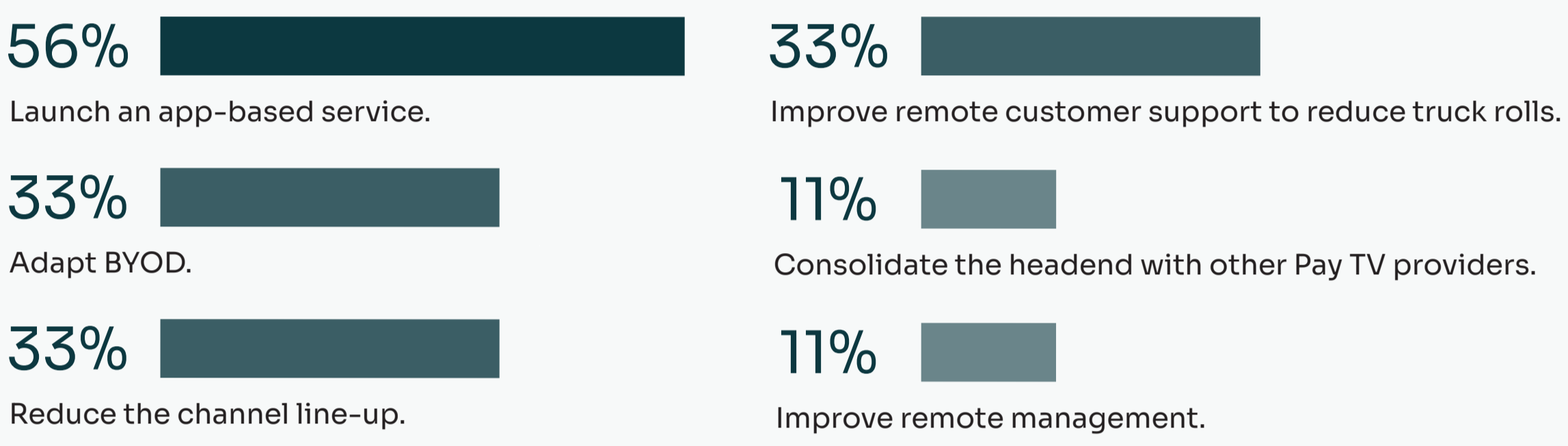
Operator Priorities

With content costs continually increasing, it is understandable that 44% of operators have prioritized reducing the cost of running their video services, however this percentage has declined over the past year.



Options being considered to reduce the cost of managing video services

Our operator customers are investigating a variety of ways to control costs through eliminating or reducing content licensing costs and managing technology investments.

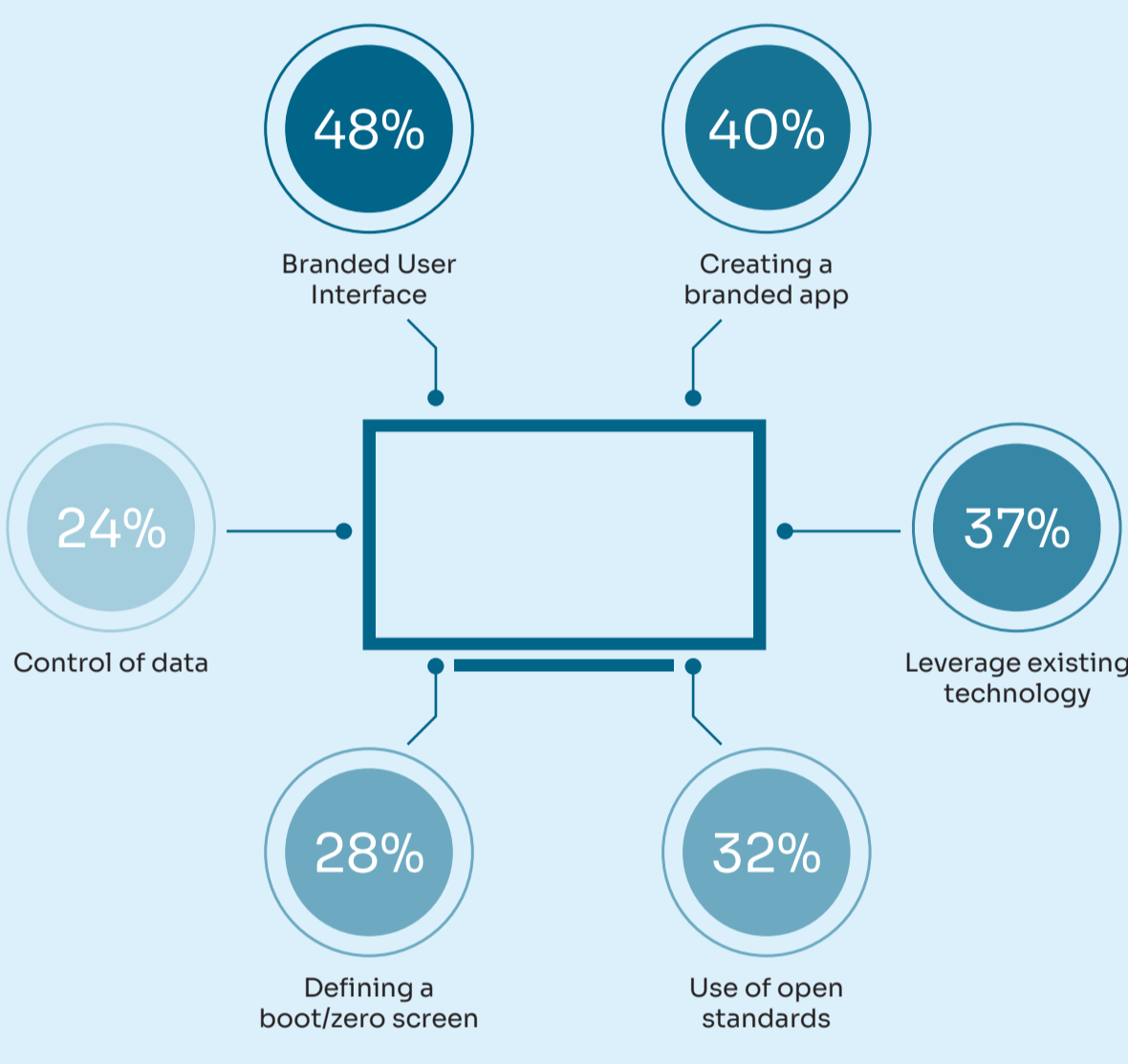


WHAT'S NEXT FOR PAY TV PROVIDERS?

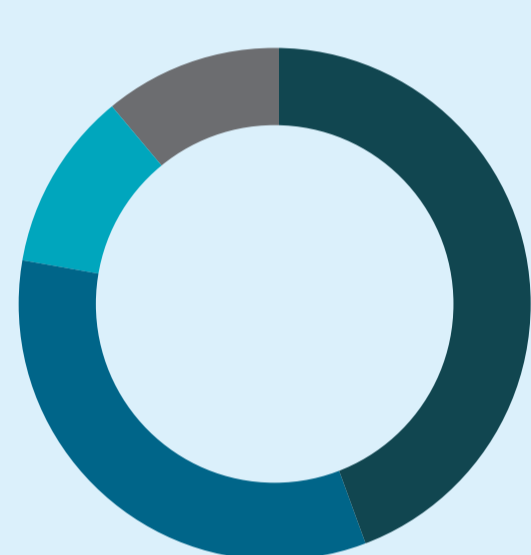
Operators face a variety of competitors and have multiple options available for updating their video services to balance subscriber and operational expectations.

What features are most important to you when considering an updated video service?

For the first time since launching the survey, operators are prioritizing the visibility of their brand in the subscriber home.

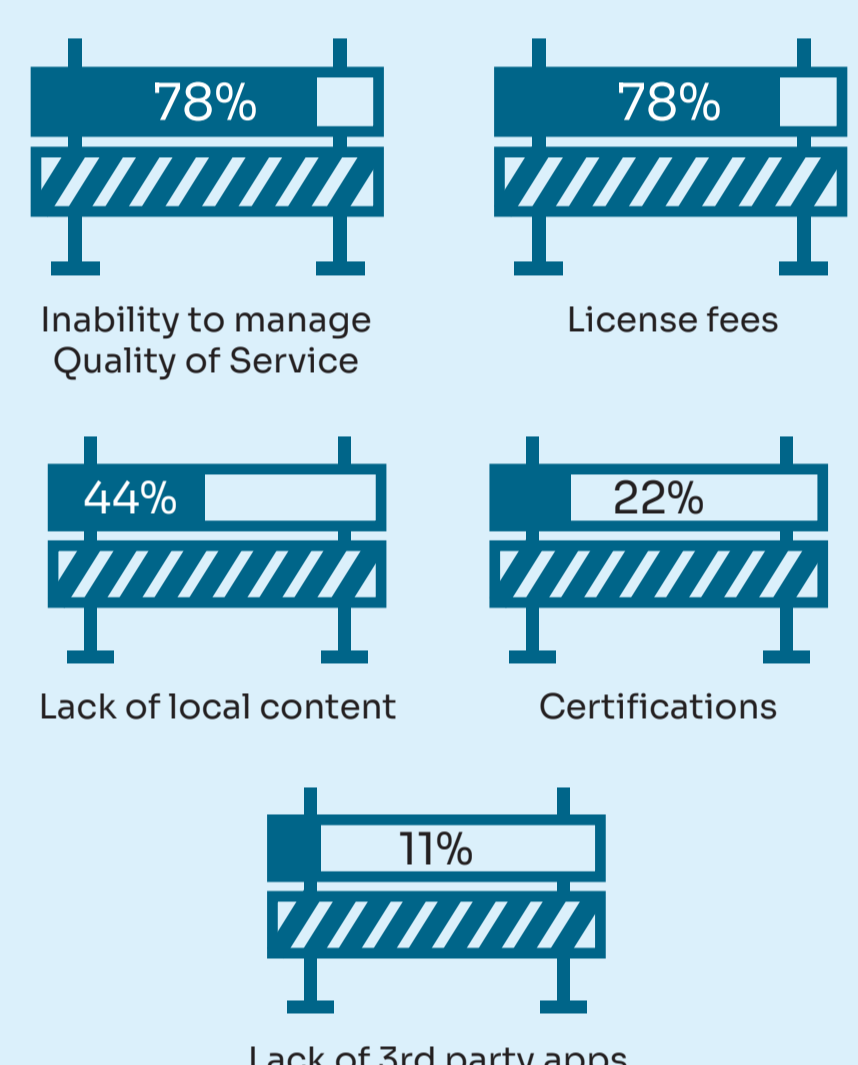


Do you have plans to deliver streaming apps alongside linear channels?



What features would deter you from selecting an alternative platform?

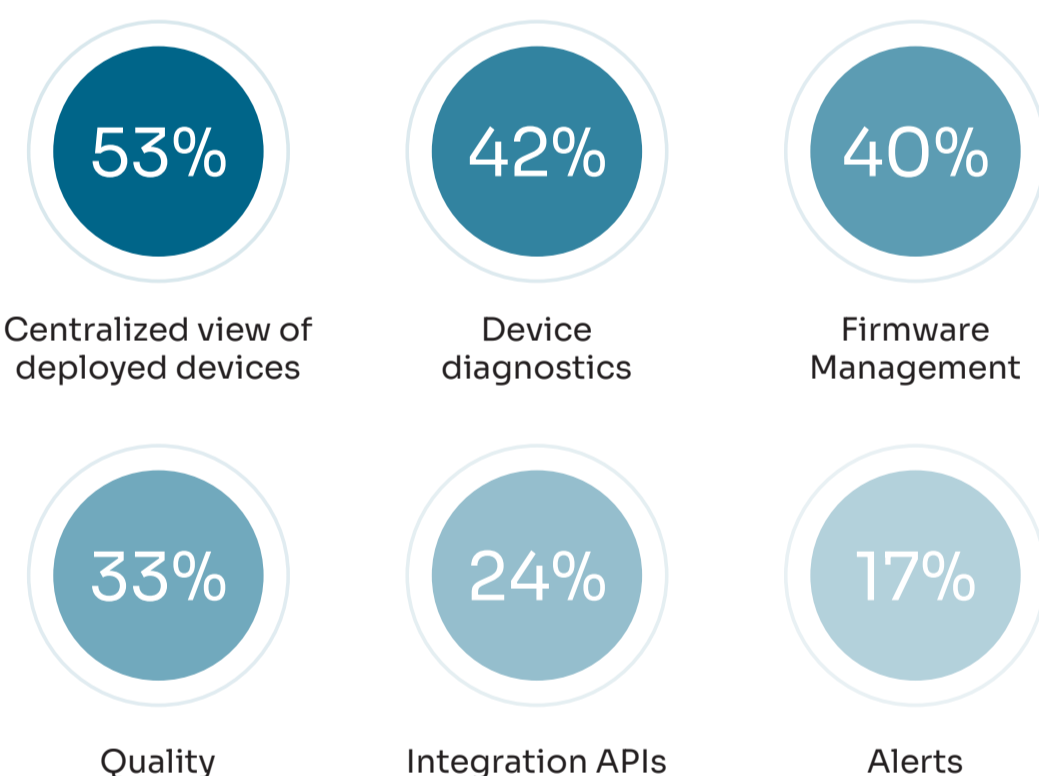
Operators want to deliver the video content their subscribers have prioritized, but are sensitive to maintaining a high quality of service and managing license fees.



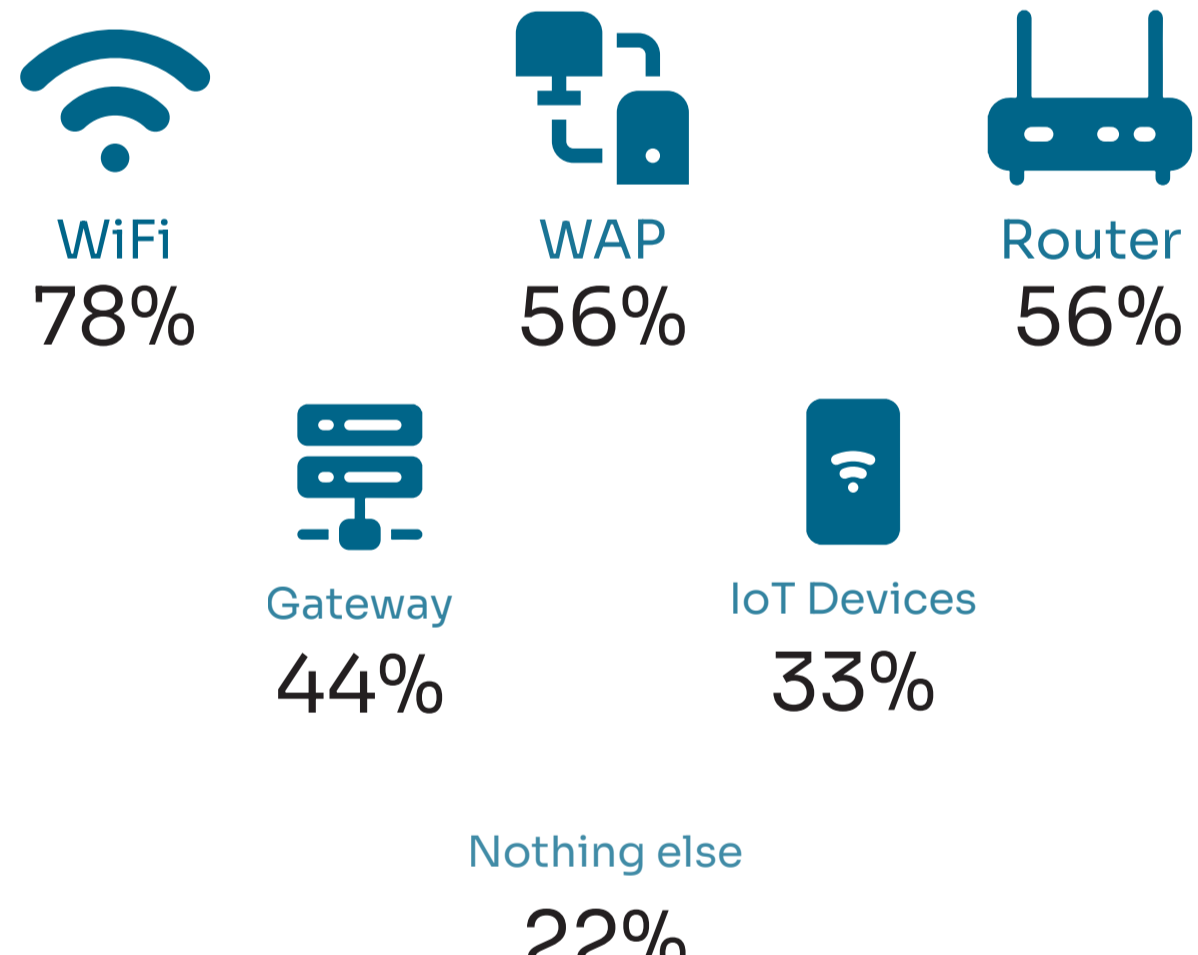
DEVICE MANAGEMENT

What device management features are most important?

Increased attention to remote management elevates the importance of device management and the operator's ability to easily manage widely deployed set-top boxes.



What other in-home devices would you like to manage in addition to the set-top box?



MANAGING DATA

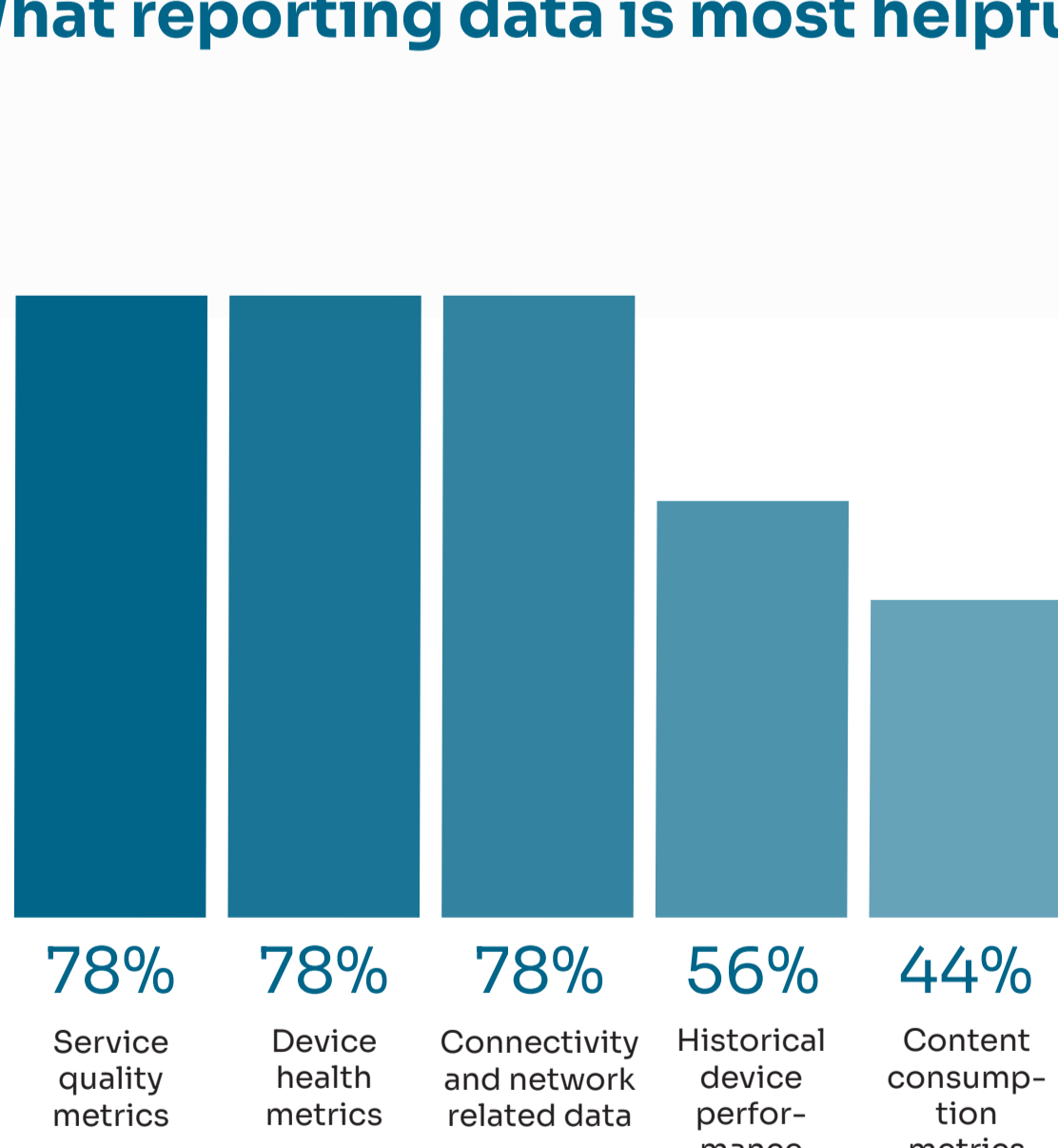
While operators are not prioritizing their use of data to enhance their services, they are interested in capturing and visualizing the data. Access to data and reporting tools is of increasing importance for effective management of video services.

What data is most helpful in managing video services?

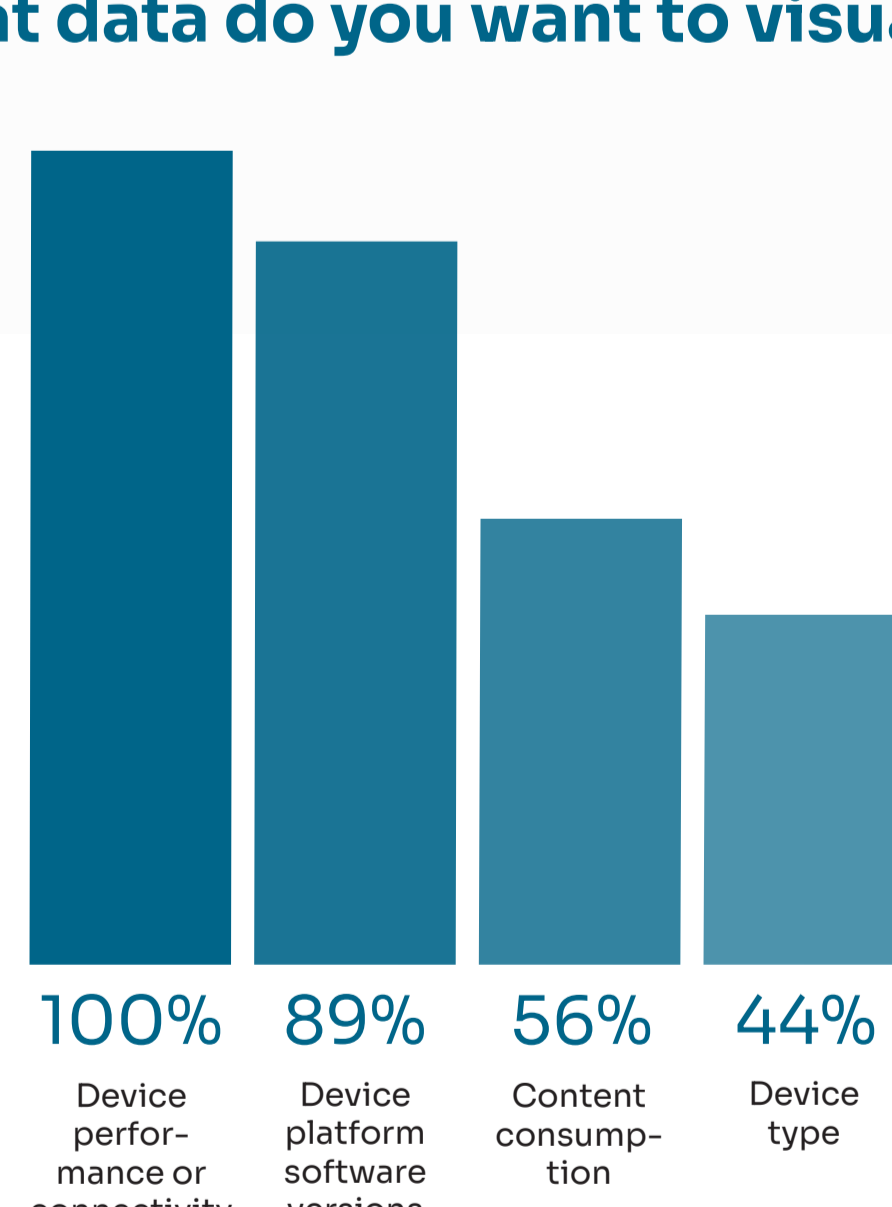
Quality of service is important to both operators and their subscribers. It is clear that gaining access to a variety of device metrics is a top priority.



What reporting data is most helpful?



What data do you want to visualize?

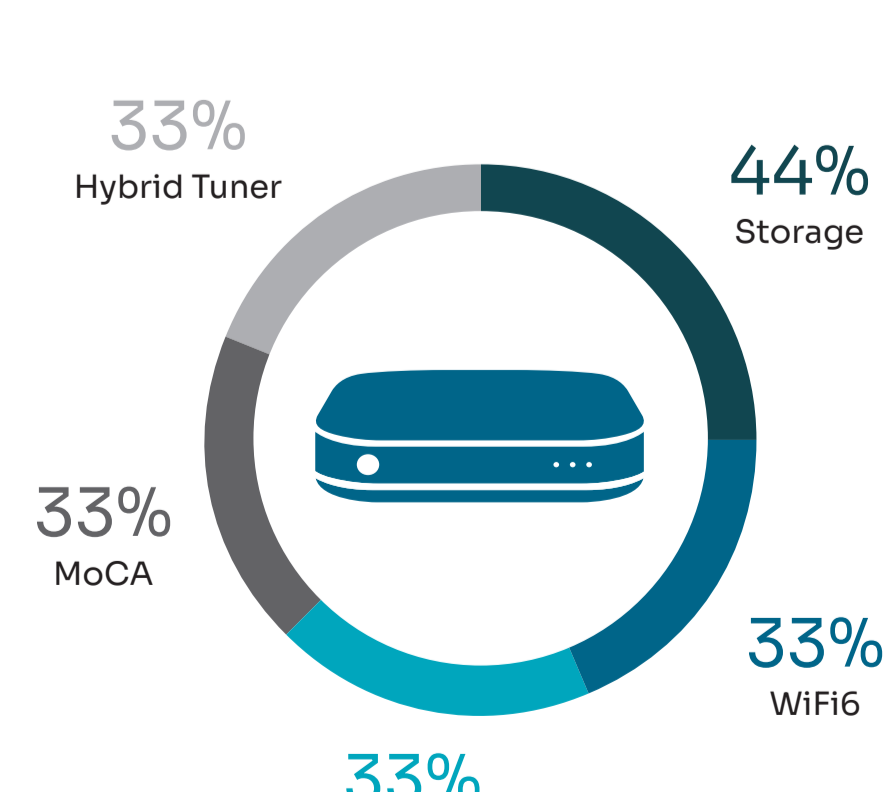


THE SET TOP BOX

The set-top box is the physical reinforcement of the Pay TV provider brand in the consumer home. Features are evolving to address both consumer and operator expectations.

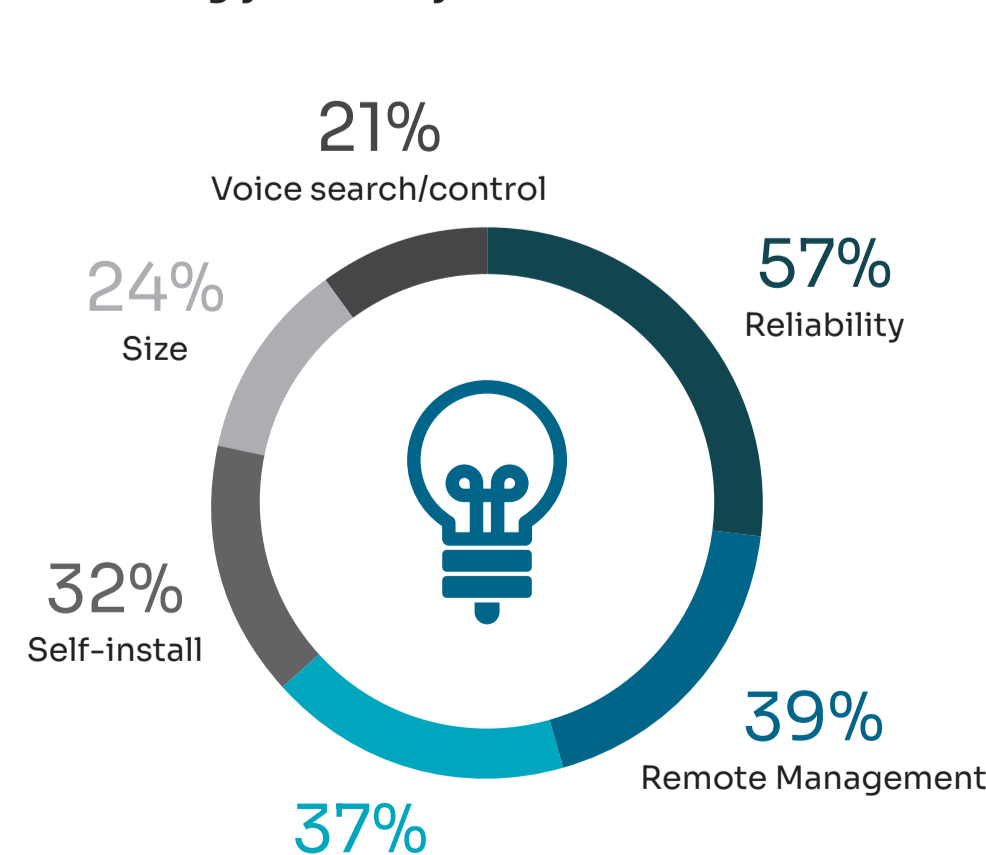
What capabilities do you require in a set-top box?

Even with the rise of video-on-demand streaming services, storage leads feature requirements confirming that even for Pay TV providers, consumers want record programs to view at convenient times.



What features are most valuable to you?

Operators consistently prioritize reliability of deployed devices with the level of importance of both reliability and remote management increasing year over year.



Our annual survey has become a benchmark of what's important to our operator customers. With competition from both national Pay TV providers and streaming services, they must be nimble. It is clear that they are committed to offering video services. The technology and business model for delivering those services may change, but only if they can retain a branded presence in the consumer home and assure a consistent quality of service.

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