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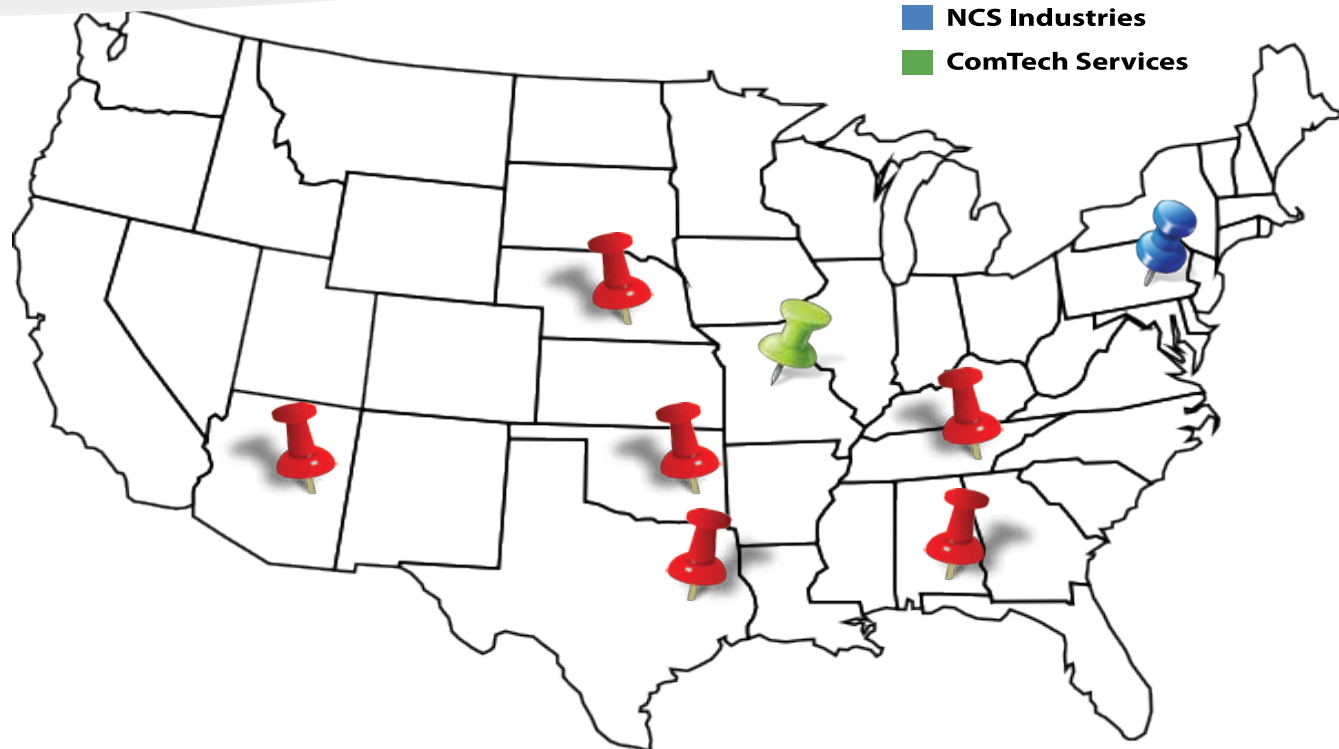
THE NCTC INDEPENDENT SHOW ISSUE

RIISING TO THE OTT CHALLENGE

**Business Services
Fast Becoming New
Revenue Stream**

**BRINGING THE ART
OF THE OUTDOORS
INTO YOUR HOME**

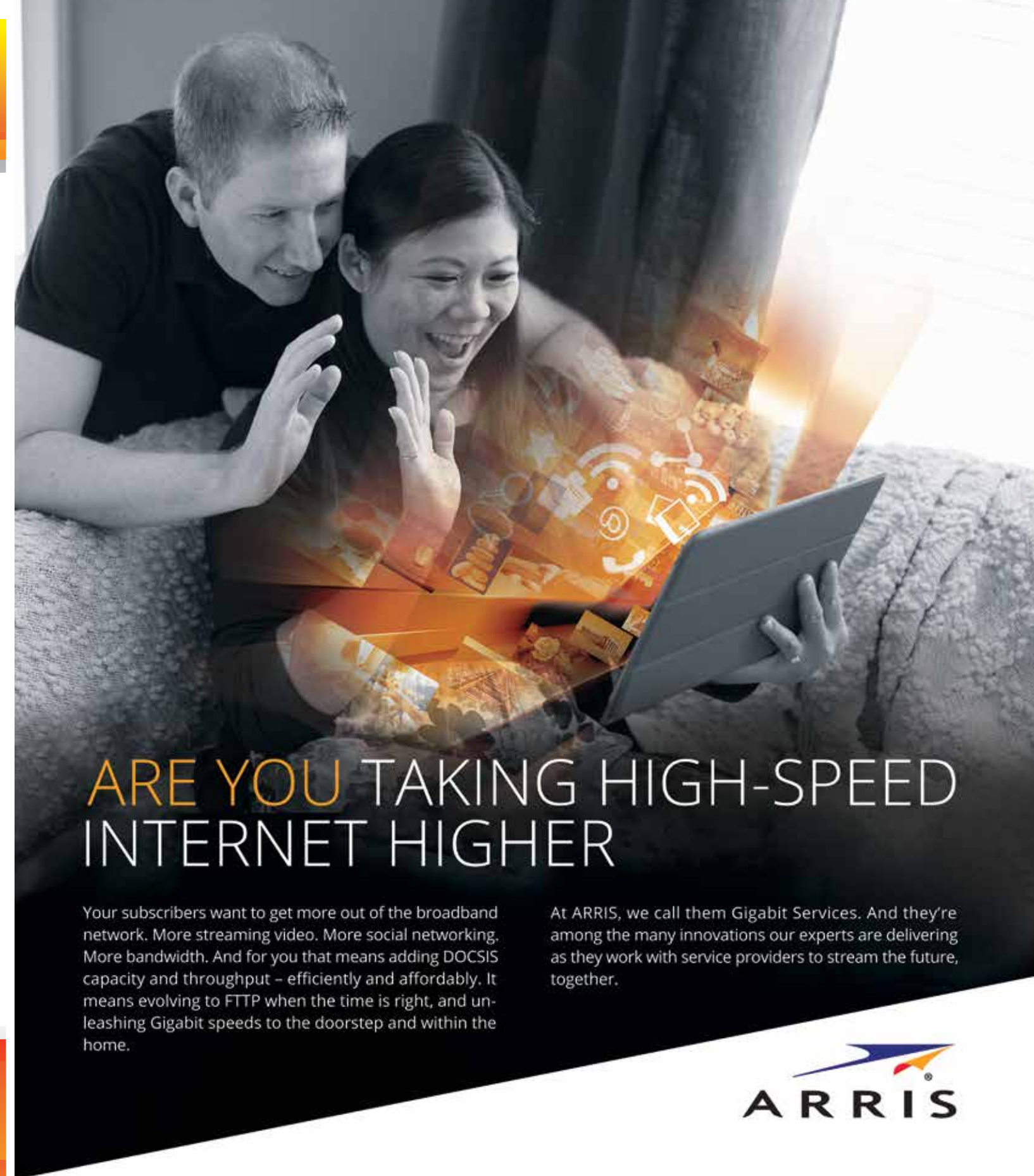
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The Pace of Change

Today, the pace of technological change and innovation continues to advance at Moore's Law speeds. The key to broadband success lies in taking advantage of evolving applications to build bigger, stronger and more versatile networks that serve both residential consumers and business customers more robustly and cost-efficiently.

In the short time since we started this magazine, everything changed. Now, challengers are bringing to market services that are literally an order of magnitude faster than what the big players are offering. The Internet of Things (finally) promises to revolutionize everything from appliances to wearables to industrial equipment and sensor technology — all at a price to our infrastructure. Disruption in the industry is endemic and unpredictable. So, it's not just that rural communities must find ways to keep up, or that legacy telcos have to reinvent themselves. Everyone connected to anything that transmits information is playing a new game every day. That's at the heart of Transmit.

In this is issue you'll find contributions from Evolution Digitals' EVP Sales, Marc Cohen on **RISING TO THE OTT CHALLENGE: How Cable Operators Can Hold On To Their Subscribers** or David Andersen's article on how **Business Services Fast Becoming New Revenue Stream for Independent Cable Operators**. Whether or not you are into fishing or hunting, sit back and enjoy Andy Levine's take on the growth of the Outdoor Sportsman Group - **BRINGING THE ART OF THE OUTDOORS INTO YOUR HOME**.

We truly welcome your input. Just send a note to me, at the link below.

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RISING TO THE OTT CHALLENGE: How Cable Operators Can Hold On To Their Subscribers



Marc Cohen
 EVP Sales
 Evolution Digital

When it comes to the pay-TV market, cable operators are under growing pressure from over-the-top (OTT) content providers that have made enormous strides in customer reach, service quality and programming variety in just the last decade. PricewaterhouseCoopers estimated that while OTT companies such as Netflix and Amazon constituted only two percent of all pay-TV revenue in 2012, they could reach 6 percent of it by 2017. What is driving this transformative trend?

USER EXPERIENCE, CONTROL AND COST: THREE BIG DRIVERS OF CHANGE IN PAY-TV CONSUMPTION

Start with the user experience. OTT platforms are relatively simple compared with a traditional pay-TV package. All a customer needs is an IP network connection, the ability to pay the relatively low monthly subscription fee and a device – whether a PC, tablet or smartphone – that can stream and display Internet video. In contrast, other pay-TV options often put up roadblocks such as clunky interfaces, legacy set-top boxes and costly multi-channel bundles.

Indeed, the average U.S. cable or satellite bill rose about eight percent a year between 2010 and 2015, according to NBC News, due to everything from provider consolidation to changes in retransmission fees governing over-the-air broadcasts. PwC also projected that 20 percent of pay-TV subscribers in the U.S. could ditch their plans (i.e., “cut the cord”) in 2016 alone as they look for more cost-effective options that cater to their à la carte preferences and offer more control over what and how they consume their favorite programs.

This broad change in consumer habits is likely to get amplified in coming years, since, as a 2016 Nielsen report demonstrated, younger viewers are the most likely of all age groups to ditch their cable or satellite subscriptions for Internet-only services. Cable operators, particularly small and medium-sized local/regional carriers, are in a bind, facing the dual pressures of subscriber attrition and surging content costs:

- » That Nielsen survey revealed that for all age groups from ages 15-49 (as of March 2016), at least 30 percent of respondents in each one intended to someday give up their cable/satellite services. At the same time, between 24 percent and 31 percent of them already paid for OTT video – a smaller portion than traditional pay-TV, but one primed for more growth.
- » Cable channels and broadcasters have both dramatically pushed up their respective fees in recent years, forcing TV providers to, in some instances, stop delivering certain content or at least take a public stand against the hikes.
- » Such upward pressure on programming prices has undoubtedly driven consumers to OTT platforms. The number of Netflix subscribers, who by and large pay under \$10 a month, shot up from only 22 million in the first quarter of 2012 to 46 million in the first quarter of 2016. Many of these consumers also have pay-TV services – Leichtman Research Group estimated in April 2016 that 83 percent of connected TV owners had cable/satellite – but the underlying risk is that operators (many of whom also provide Internet service) will eventually become dumb pipes for OTT.

Stepping back for a moment, it is clear that smaller cable operators have their work cut out for them due to this new competitive landscape. While large industry players such as Comcast, Charter and Cox have the financial resources to quickly transition to IP distribution, their local/regional counterparts are not as inherently advantaged. How should they respond to the rapidly evolving OTT challenge?

The average U.S. cable or satellite bill rose about eight percent year between 2010 and 2015

WHAT CABLE OPERATORS HAVE TO ADDRESS WHEN RESPONDING TO THE OTT SURGE

Due to their size and limited footprints, Tier 2 and Tier 3 operators are vulnerable to losing customers to cord-cutters. There have several options in front of them for adapting to the OTT sea-change, each of which deserves further evaluation:

BETTING THE FARM ON AN OTT PROVIDER PARTNERSHIP

This is a tempting route to take since it looks relatively easy on the surface. The OTT provider supplies the user interface and content libraries, while the operator offers the network infrastructure and the subscriber base.

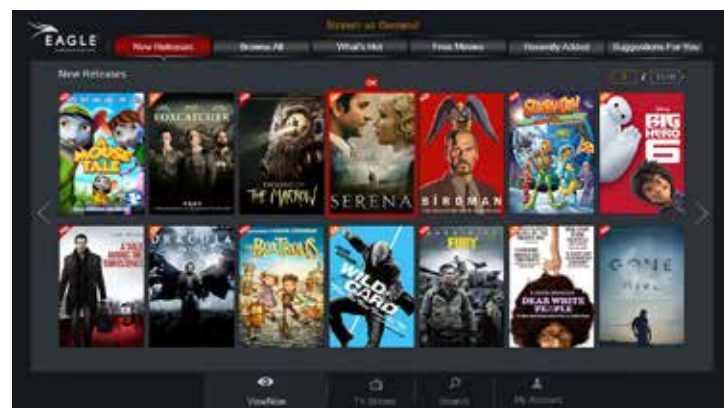
The Q1 2014 Video Trends Report from Digitalsmiths revealed how operators such as RCN and SuddenLink had made it possible for their customers to access Netflix directly from their TiVo boxes. In addition, some operators have taken the more radical approach of providing its customers with an AppleTV or Roku device in exchange for subscribing to a broadband package. This strategy is simply a race to the bottom as there is little protection to prevent subscribers from finding an alternative broadband solution from a telco or wireless provider.

Partnering with an OTT provider ostensibly streamlines the user experience, allowing for amenities like personalized lists, easy search and the ability to decrease the number of services (e.g., dropping premium channels) as Internet video plays more of a starring role. The risk, however, is that the cable operator becomes a so-called dumb pipe that simply transports the OTT company's content.

A SUPERIOR ALTERNATIVE: ROLLING OUT A COMPLETE IP SOLUTION

Operators can and should make it easy for their subscribers to access OTT content, but they have to also shore up their own platforms. What if they could stand up a video service equivalent to the leading OTT services with virtually the same movies and VOD content?

The roadblock here has usually been legacy STBs and aging distribution infrastructures. Many of them lack sufficient bandwidth, storage, do not offer a good user experience and are difficult to update since they do not do much with the IP suite. Accordingly, they are far from ideal for supporting the type of on-demand viewing behaviors that many consumers have gravitated to over the last few years.



eVUE-TV from Evolution Digital delivers thousands of hours of new release and catalog movies plus on-demand viewing of popular cable shows.



Evolution Digital's eBOX IP Hybrid set top integrates traditional cable channels with OTT services on one device. Its universal search feature displays results from both cable channels and OTT services, providing viewers convenience they are looking for.

Enter the IP hybrid set top box (STB). It includes both a QAM tuner for delivering pay-TV services and IP connectivity (with Ethernet and MoCA ports to go with RF and AV) for providing IP video and access to OTT services. From a unified interface on a single box with one HDMI connection to the TV, cable subscribers can access linear TV, OTT services, and managed IP Video and VOD services like Evolution Digital's eVUE-TV™. With thousands of hours of top rated movies and on-demand content, eVUE-TV gives the operator its own service that has a content lineup that rivals any of the popular OTT services.

Plus, this platform reduces the need to juggle between OTT and IP-VOD services while hunting for a specific show or movie. Built-in universal search lists all the services that have the particular movie or show, regardless of where it is hosted, capitalizing on the potential of the subscriber watching content on the operators' VOD service and not on the OTT service. Best of all, with an integrated universal search platform, the movie or VOD content from the cable operator will always be listed as the first option for the viewer. The convenience factor and integrated billing is likely to drive increased usage for the operator's IP-VOD business.

Transition is the name of the game for cable operators today. With an IP hybrid STB and a scalable IP-Video On-Demand platform, providers can give consumers the services that they want but offer a more compelling and robust suite of video services to help retain current customers and expand revenue opportunities.

To learn how an integrated IP Hybrid and IP Video solution can enhance your business, please visit EvolutionDigital.com/eBOX-ip-hybrid-stb

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Business Services Fast Becoming New Revenue Stream for Independent Cable Operators

SMB segment expected to provide a \$20 billion to \$30 billion market opportunity going forward to cable television companies

Today's broadband poker game has more players at the table, and higher stakes. Faced with cost conscious, not so loyal residential customers who are cutting the cord for alternative pay TV options, and increasing government intrusion looming on the horizon, cable television companies have a revenue ace up their sleeve with business services.

By David Andersen

Revenue from MSO business services divisions finished 2015 up 20 percent year-over-year to \$12 billion, according to a report from Zacks Equity Research.

"For quite some time now, MSOs have been aggressively targeting the small and medium-sized business (SMB) segment, which is the core area of operation for telecom operators," the Zacks report said. "Various industry researches estimate the SMB segment is expected to provide a \$20 billion to \$30 billion market opportunity going forward."

Capitalizing on their investment in fiber optic infrastructure over the past two decades, cable television companies are rewriting their business models to include a new breed of customer. Small and medium commercial businesses.

Verizon has called cable companies "a disruptive wild card" in the commercial business marketplace. "As the FCC considers competition related to special access services, the Commission must determine where competition from cable or other providers is possible," Verizon said in an FCC filing. "For cable, this means taking into account cable's advantages resulting from its ubiquitous broadband networks, the enterprise facilities it has deployed to date, and rising demand that increase the available revenue opportunities."

Mediacom Business, a division of Mediacom Communications Corporation, is a good example of a cable company capitalizing on extending its scalable, high-capacity broadband network to

thousands of commercial businesses in the rural markets it serves, according to Kristi Salmon, Senior Director of Marketing for Mediacom Business.

"While companies like Google are touting their ability to build broadband networks in large metropolitan areas, our fiber-optic network is already in place in America's heartland, delivering speeds of one Gigabit and more to customers of every size and scope who conduct their business online all-day, every day," Ms. Salmon said.

With over 5,300 fiber route miles throughout the state of Iowa alone, Ms. Salmon said Mediacom Business now provides Gigabit+ broadband capacity to more than 2,500 business locations, including municipalities, schools, healthcare facilities, and other community anchor institutions. Business locations are utilizing Gigabit + Fiber Solutions from Mediacom Business at speeds up to 10 gigabits per second.

PK Network, an advertising and marketing communications agency in New York, created a library of advertising and marketing tools, including online videos, a website, TV spots, direct mail, and billboards for Mediacom. "Uncover The Truth," targeting small to medium sized businesses, uses humor to address the ease and cost savings to switch to the Mediacom Business Bundle.

For large enterprises like healthcare facilities, schools and municipalities, the agency coined "Gigabit+Solutions™" from Mediacom Business to create an immediate differentiation in





promoting its fiber optic infrastructure. The brand awareness campaign, targeting anchor institutions and large businesses, includes video testimonial case studies, press releases, as well as targeted direct mail, web banner ads, and event signage.

“Our marketing strategy communicates Mediacom Business as the leader in developing, deploying, and managing broadband networks, and providing affordable bundled services. The campaigns educate and soften the market for sales. It’s a strategy that has supported significant year-over-year revenue and growth for both small and enterprise level businesses,” Ms. Salmon said.

Mediacom Business recently announced an initiative to extend its scalable, high-capacity broadband network to hundreds of commercial properties in Des Moines, IA; Valdosta, GA; Springfield, MO; and the Quad Cities Area of northwest Illinois and Southeastern, IA, according to Ms. Salmon.

Dubbed Project Open Road, Ms. Salmon said this effort to put gigabit Internet speeds within immediate reach of more local businesses is part of Mediacom’s broader plan to invest \$1 billion over the next 3 years to, among other projects, upgrade and expand its national broadband network.

“By targeting unserved and underserved business locations in more markets, Mediacom Business will build its advanced broadband facilities to the doorstep of an untapped segment of commercial properties,” Ms. Salmon said.

“Project Open Road will enhance the value of commercial buildings by connecting those properties with the highest quality communications services

available in the market. In today’s highly competitive commercial real estate marketplace, high-capacity broadband accessibility is absolutely necessary to attract and maintain quality tenants. Mediacom Business offers a superior option for data and voice solutions over providers who use aging technology like DSL or T1 lines to deliver service,” Ms. Salmon said.

Pat Kehoe, Founder and President of PK Network, said the marketing, advertising, and communications services her firm provides to Mediacom Business come with measurable results that show how they help drive economic growth in local marketplaces with effective campaigns about the high-capacity broadband tools that businesses need to be successful.



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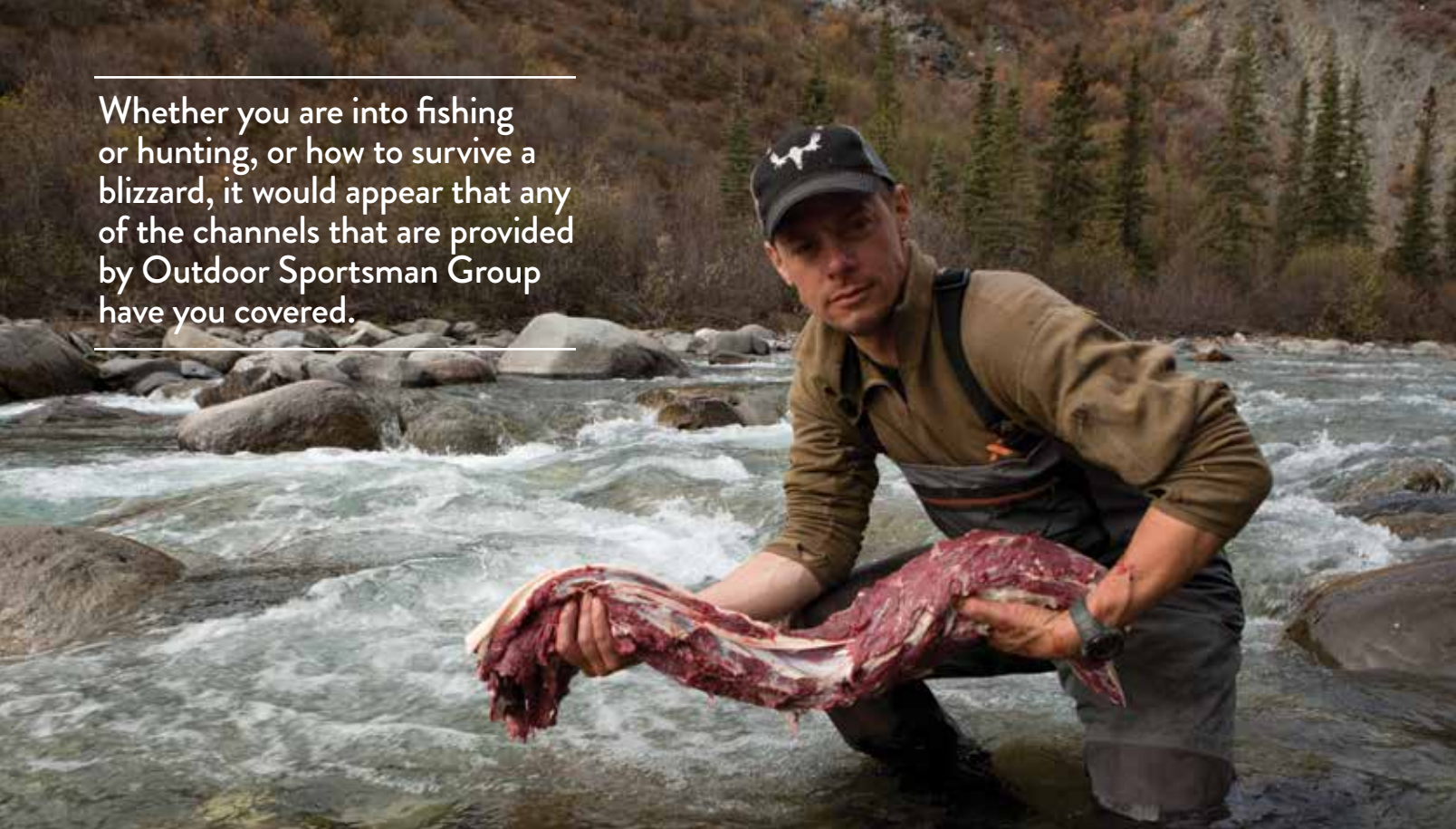
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Have you ever just wanted to sit down, relax with a cold drink, and dive into some bass fishing competition, or a wild game hunting show, or maybe you want to catch up with reruns of Duck Dynasty... Whatever the show is that is pulling at you to watch it, there is a trio of networks out there perfectly fit for your viewing pleasure; Outdoor Sportsman Group Networks. The channels will definitely scratch you where you are itching when it comes to outdoor and masculine adventure programming: Outdoor Channel, Sportsman Channel, and World Fishing Network.

By Andy Levine



Whether you are into fishing or hunting, or how to survive a blizzard, it would appear that any of the channels that are provided by Outdoor Sportsman Group have you covered.



Outdoor Channel took a strategy of building a potent, entertaining and adventure-filled Monday night programming roster – anchored by Duck Dynasty – and has turned it into the driving force that has helped Outdoor Channel soar and propel all three networks to recent program and ratings successes. In fact, according to Jim Liberatore, CEO and President of Outdoor Sportsman Group Networks, Outdoor Channel is ranked as the No. 1 fastest growing English-language cable network during Monday programming with Adults 18-49 (+129%) and Adults 25-54 (+104%) during the most recent quarter. This is a huge feat considering Outdoor Channel's main competition include: A&E, Discovery, National Geographic, and The History Channel.

The programming that is available through the Outdoor Sportsman Group Networks is truly something to behold. They have programs that will take you on a river trip to catch large mouth bass. They have programs that will drop you in the middle of nowhere and ask you to survive and get yourself home. They have some of the most amazing personalities on the air right now. People like first baseman Adam LaRoche, actors R. Lee Ermey, Joe Mantegna, country singers Craig Morgan and Nick Hoffman, along with a slew of other personalities that may not be as Hollywood prolific as some of the names previously mention but they are in the world of outdoor television. Outdoor Sportsman Group has even been able, most recently, to secure the syndication rights to one if the most

popular shows on the air; Duck Dynasty. Just by clicking over to www.outdoorchannel.com you are sure to find a name of someone who you know from your childhood or have heard about at the water cooler. It is truly a wondrous thing since many people are just now learning about these channels.

What makes this company so great is that they are catering to a very specific audience, and it's an audience that wants what they want. Again, according to Mr. Liberatore, 44 percent of US adults participate, attend, watch TV shows or read magazines about Hunt/Fish/Shoot. Thirty five percent of US adults participated in hunting or fishing in the past year. Twenty-one percent of US adults watch hunting/fishing shows on TV, or read outdoor adventure magazines. And 27 percent of US adults regularly watch masculine adventure programs. In all, about 56 percent of US adults are viewing masculine adventure programs, participating in those same adventures or observing those types of adventures. This is all in comparison to adults who watch or read about Golf (28%), Tennis (15%), or Cycling (30%). When you stop to think about what that means for the regular TV viewer, well, there are a ton of programs that are out there right now, courtesy of Outdoor Sportsmen Group to whet the appetite for this massive group of viewers.

When I think of all the television programming out there for the everyday viewer it astounds me that the Outdoor Sportsman Group is making the programming they have available to viewers. Of all the reality shows, the DIY shows, the survival shows, the shows that ask the viewer to come inside and live along with the family it is showcasing, of all those types of shows, Outdoor Sportsman Group Networks have double downed and made available something for everyone. Whether you are into fishing or hunting, or how to survive a blizzard, it would appear that any of the channels that are provided by Outdoor Sportsman Group have you covered. Outdoor Channel will take you into the wilderness. Sportsman Channel will take you to competitive shooting competitions. And World Fishing Network will get you out on that boat and give you the first person feeling of reeling in that large mouth bass. With all of the shows out there right now, on all of the networks, those three adventures seem totally worth your time and investment.

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