

# PRIME INSIGHT + FOCUS

*Designed for telecom directors and managers  
in product, market, sales and channel management*

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## 2015 Spring Telco Events

All six of our spring Telco events will be held at **One Ocean in Atlantic Beach, FL** (Jacksonville). See the full schedule on page 2.

Our events are designed for Telco Directors, Product and Marketing Managers, Sales Channel Managers and their vendors. Our interactive sessions include presentations and roundtables covering success stories and best practices, new applications and services, converged services, loyalty and churn-reduction

strategies, traditional and alternate channels, competitive overviews and strategies, and much more...

**Our first series of events during the week of March 16 will cover Telco broadband or IPTV marketing and product management / development issues:** IPTV Marketing Symposium, BMMA 2015 Annual Meeting and ResearchFirst's Broadband Services 2015 Seminar. The BMMA Annual Meeting is a members-only session, so we encourage Telco providers and vendors to [learn about BMMA membership](#). Our other two events are open to any Telco provider or vendor.

**Our second series of events during the week of April 20 will focus primarily on Telco sales channel issues:** Sales

Association Meeting, Telcos Sales Channels 2015 Seminar, SMB Sales & Marketing Symposium.

For information on all of our events, visit [www.researchfirst.com](http://www.researchfirst.com). Sponsorship and speaking opportunities are available. Please contact me to discuss.

We look forward to seeing you in Florida!

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## Mark Your Calendars

Join us for these upcoming events:

### BMMA January Hot Topic Call

*Executives Perspectives on Broadband*  
January 27, 2015 - 2 PM-3:30 PM CST

### IPTV Marketing Symposium

March 16, 2015

### BMMA 2015 Annual Meeting

March 17, 2015

### Broadband Services 2015 Seminar

March 18 - 20, 2015

### Sales Association Meeting

April 20, 2015

### Telco Sales Channels 2015 Seminar

April 21-23, 2015

### SMB Sales & Marketing Symposium

April 23-24, 2015

All of our spring events  
will be held at One Ocean in  
Atlantic Beach, FL

Visit our website for details:  
[www.researchfirst.com](http://www.researchfirst.com)

## SMB Sales & Marketing Symposium - April 2015

ResearchFirst will hold its first SMB Sales & Marketing Symposium in Atlantic Beach, Florida at One Ocean on April 23-24, 2015. This symposium is geared specifically for Directors, Managers and vendors who target the sale and marketing of Telco products to SMB customers.

The Symposium agenda will include such areas as:

- Growth in a highly competitive market
- Churn and loyalty
- Competition
- Budget constraints
- Effective communication/collateral
- Marketing successes
- Next gen products
- Operational issues
- Economic conditions for small businesses

We look forward to seeing you in April. Contact me regarding speaking and sponsorship opportunities. Visit our [website](#) for additional information.

*Anna Gibson, Vice President*

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## ResearchFirst Holds Its First IPTV Marketing Symposium

In September 2014, RFI held our first IPTV Marketing Symposium in Montreal following the BMMA Fall Workshop.

Several other IPTV events are held each year, but as none really focused on IPTV marketing issues we plunged ahead. The event was a success with top-notch speakers and sponsors, excellent attendance, and active participation.

We had great representation from Telco product management, marketing, strategic planning and hardware development with IPTV responsibilities as well as from the key vendors that serve the Telco IPTV market.

**Below are a few highlights from each session:**

**ResearchFirst's own Ellis Hill** welcomed everyone to the Symposium and presented an overview of the TV services market.

Cable companies continue to grow voice and high speed Internet subscribers to the detriment of the Telcos in the US and Canada, while Telcos have significantly grown their TV subscriber base. Of course OTT and video subscription services also continue to grow, and Ellis warned that we need to integrate these services into our Telco portfolios now.

**Shelley Forester of MTS** presented their new TV product promotional strategy. This included promoting their Basic Channel group, allowing them to position themselves more attractively against aggressive starting offers from cable companies. They also reduced their mass acquisition offers from 6 months to 3 months and added two door-to-door teams. All of this resulted in improved results and was very successful.

**Mark Wallitsch of Alcatel-Lucent** shared insights on the new services and technology enablers that will transform today's pay-TV services into a TV service increasingly enabled by open, cloud based technologies that will simplify the home, provide new

personalization and content transformation capabilities, and efficiently enable multiple television services to the same subscriber. Mark covered the importance of space on the DVR, the ability to time-shift TV, and of multi-screen access to the DVR.

**Régine Jeudy of Bell Canada** presented on their powerful, clean marketing message: *Bell Fibe TV is the best TV service*. Bell's golden messaging rules are: Keep it simple. Keep it single-minded. Keep it for a while. Régine shared several examples using a variety of advertising media.

**Erin Olson of TDS Telecom** explained how they use a sell-as-you-build strategy to market their fiber-based TV product. TDS used the "Fiberville" creative concept to tout TDS as *"Home of the best technology - available exclusively to your neighborhood"*. Erin shared examples of the advertising media used to effectively convey this message.

**Alan McNaughtan of Bell Canada** gave a great overview of access pipe contention issues and warned that increasing demand for higher broadband speeds and more simultaneous HDTV channels can cause contention on FTTN networks. This problem will become even more prevalent as 4D TV and higher bit-rate OTT services expand.

**David Thompson from of ZyXEL** presented on the evolution of broadband and IPTV CPE from the early modems and routers to the latest Gigabit routers and wireless IPTV set-top boxes. He reviewed ways in which service providers could use the latest CPE as a competitive advantage through faster WiFi, remote management and better support.

**Dan Brazeau of Bell Canada** led us through Bell's Fibe TV hardware roadmap. Bell is Canada's second largest TV provider with over 2.3M IPTV or satellite TV subs. Their recent deployment of 300k wireless set-top boxes has resulted in substantial cost savings due to reduced installation times and have improved the customers' video

quality experience. With this wireless STB, customers are also more likely to switch to Bell TV products and less likely to churn.

**Yuvraj Kakkar of Ericsson Mediaroom** gave a broad overview of Ericsson's IPTV offerings and portfolio. He also shared their latest product launches, future IPTV technology roadmap and marketing opportunities associated with them. Ericsson expects there will be 15 billion connected video devices by 2020. To begin preparing for this, Mediaroom 2.5 introduced a new restart/catch-up feature in 2014 and will add multiscreen integration and cloud DVR along with other exciting features in 2015.

In his presentation "What's Next for IPTV", **Geoff Burke of Calix** described how three trends are driving consumer demand: movement of content to the cloud; increased demand for higher definition video (e.g., Ultra HD/4K TV); and the proliferation of HD/UHD devices. The best solution for Telco providers is to "own the Gig experience." One way to do this, in addition to deploying more fiber, is to provide carrier-class Wi-Fi to customers. This will not only provide a better customer experience but also reduce IPTV installation times and provide a market-differentiating service level.

**We thank our event sponsors: Alcatel-Lucent, Calix, Ericsson, and ZyXEL.**

Their support made this event even more enjoyable and memorable for all.

Make plans to join us at our [spring IPTV Marketing Symposium](#) on March 16, 2015 in Atlantic Beach, FL, immediately preceding the 2015 BMMA Annual Meeting.

*Stan Romero, Vice President*

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## 3Q 2014 Major Broadband Provider In-Service

Broadband Service Provider	2014			
	2Q In Service	3Q In Service	3Q Gain	3Q % Gain
<b>Major Telco HSI</b>				
AT&T	16,448,000	16,486,000	38,000	0.2%
Verizon	9,077,000	9,146,000	69,000	0.8%
CenturyLink	6,055,000	6,063,000	8,000	0.1%
Frontier	1,931,521	1,953,376	21,855	1.1%
Windstream *	1,319,800	1,312,000	(7,800)	-0.6%
FairPoint	333,421	329,494	(3,927)	-1.2%
Cincinnati Bell	270,300	270,500	200	0.1%
Consolidated Communications	259,225	261,027	1,802	0.7%
TDS Telecom	258,700	256,900	(1,800)	-0.7%
Hawaiian Telcom	111,736	112,670	934	0.8%
<b>Total US</b>	<b>36,064,703</b>	<b>36,190,967</b>	<b>126,264</b>	<b>0.4%</b>
Bell Canada	2,203,808	2,253,363	49,555	2.2%
TELUS	1,431,000	1,453,000	22,000	1.5%
Bell Aliant	976,954	991,700	14,746	1.5%
SaskTel *	204,000	206,000	2,000	1.0%
MTS	213,561	215,744	2,183	1.0%
<b>Total Canada</b>	<b>5,029,323</b>	<b>5,119,807</b>	<b>90,484</b>	<b>1.8%</b>
<b>Total Telco</b>	<b>41,094,026</b>	<b>41,310,774</b>	<b>216,748</b>	<b>0.5%</b>
<b>Major Cable</b>				
Comcast	21,271,000	21,586,000	315,000	1.5%
Time Warner Cable	11,965,000	12,073,000	108,000	0.9%
Charter	4,850,000	4,956,000	106,000	2.2%
Cox *	4,063,441	4,064,163	722	0.0%
Cablevision	2,779,000	2,756,000	(23,000)	-0.8%
Bright House *	1,529,423	1,538,599	9,177	0.6%
Suddenlink	1,103,300	1,135,500	32,200	2.9%
Mediacom	987,000	997,999	10,999	1.1%
WideOpenWest (WOW)	769,600	729,700	(39,900)	-5.2%
<b>Total US</b>	<b>49,317,764</b>	<b>49,836,961</b>	<b>519,197</b>	<b>1.1%</b>
Rogers	1,983,000	1,999,000	16,000	0.8%
Shaw	1,918,418	1,930,401	11,983	0.6%
Videotron	1,415,600	1,432,300	16,700	1.2%
Cogeco	676,802	679,584	2,782	0.4%
<b>Total Canada</b>	<b>5,993,820</b>	<b>6,041,285</b>	<b>47,465</b>	<b>0.8%</b>
<b>Total Cable</b>	<b>55,311,584</b>	<b>55,878,246</b>	<b>566,662</b>	<b>1.0%</b>
<b>Major Satellite Broadband</b>				
ViaSat *	657,000	620,000	(37,000)	-5.6%
dishNET	525,000	553,000	28,000	5.3%
<b>Total Satellite</b>	<b>1,182,000</b>	<b>1,173,000</b>	<b>(9,000)</b>	<b>-0.8%</b>

Sources: Quarterly reports, Cable DataCom News and ResearchFirst, Inc. research.

\* Estimated 12/08/14

## Telco Sales Association Launches January 1

In August, ResearchFirst announced the formation of a Sales Association, designed for Managers and Directors in Telco sales, support and channel marketing. Nine companies so far in the U.S. and Canada have expressed a desire to join.

The Sales Association, which launches the first of the new year, will address both consumer and small business channels, traditional inbound channels, retail, and alternate channels such as feet on the street or any other means of meeting customers where they work, play and live.

The Association is modeled after the highly successful [BMMA](#) (Broadband Multimedia Marketing Association). Similar to BMMA, the Sales Association will include the following benefits:

- Face to face meetings to network with peers, share best practices and learn from others
- Quick answers from peers to pressing questions
- Industry benchmarking and other reports
- Monthly *hot topic* conference calls
- Best in Class awards

This is an exciting opportunity for our industry. For more information, contact me.

Thank you,

*Anna Gibson, Vice President*

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**Join our team of Telco  
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