



Marketing Interest 2020 Topic Groups Final Deliverable

2020 Marketing Interest Groups

Marketing Interest Groups formed to address the following subjects:

- Bundling
- CCPA/Privacy
- 5G
- Digital Retention

Included in this document are mission/overview, a year-end summary and call notes for each group.

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Bundling

Participants

Altice – Pedro Pinheiro
Armstrong – Peter Grewar
Charter – David Gray
Cox – Betty Jo Roberts
Cox – Sid Negretti
Mediacom – Dianne Schanne
Rogers – Helene Bahsous
Rogers – Mustafa Zileli
Shaw – Dale Turner
Shaw – Karin Borgersen

Mission/Overview

In 2020, the group wanted to assess the best practices in the post-landline world and include approaches to integrating OTT products within current MSO customer experiences.

With the advent of COVID-19, the group pivoted to discussing approaches to handle the current market situation and shifting consumer behavior. On the July call, Cox presented “Thoughts around emerging post-pandemic segments.” Cox research unveiled insights on consumer perceptions around the bundle, as well as consumer priorities around home connectivity. Two potential market solutions are a Work from Home bundle allowing for higher internet speeds, enhanced customer care, and unlimited data usage, and a two-modem solution for homes to separate schooling from work.

The subsequent group discussion addressed sales activity compared to the start of the pandemic, current perspectives on video in relation to internet, and changes in internet offerings to customers.

Year-End Summary

The group’s initial objective was to continue assessing best practices in bundling in the post-landline world and the integration of OTT products. Most companies reported increases in internet-only subscribers on the February call, and approaches to bundling video sales varied. From April forward, focus of the group shifted to dealing with the pandemic, its impacts on business and the associated recovery plans. This included strategy around Keep America Connected and hardship offers and how to maintain and migrate these subscribers over time. Many companies had seen peaks and were beginning to see sales waning by end of April. By July, most members were focusing on product and bundle offerings to meet changing consumer needs, including work from home.

Call Notes – February 10

Welcome/Roll Call

Deepa Venkataraman welcomed the group and gave an overview of the call agenda.

Call Attendees:

Dianne Schanne, Mediacom
David Gray, Charter
Pedro Pinheiro, Altice
Deepa Venkataraman, CTAM
Ariane Guardarramas, CTAM

Group Objective

The 2020 group objective will be to continue to assess the best practices in the post-landline world and include approaches to integrating OTT products within current MSO customer experiences.

2020 Topic Areas

The group noted the following topics of interest:

- Reasons behind acceleration of cord cutting in early 2020 (customers opting for internet-only packages)
 - All 3 MSOs on the call, Altice, Charter + Mediacom noted they indeed have seen an increase in internet-only packages.
 - Altice mentioned they saw a higher increase in cord cutting this January which was after a recent Altice price increase.
 - Charter's internet packages continue to grow steadily and account for the bulk of their customer relationship growth. Charter has had some success with streaming services but does not deploy these offers broadly – they are targeted to specific customers. Charter also stated that the largest of the virtual MVPDs customers have migrated to, increased their rates at the end of 2019.
 - Mediacom noted the increase has not just been in early 2020 though, it's been consistent and believes it is part of their deliberate strategy as Mediacom has made a commitment not to sell video at a loss. The other reason is simply that some consumers struggle to afford bundled packages.
- What is video's role in the bundle?
 - Charter is committed to the Bundle and feels their opportunity to still continue to drive penetration to their double and triple play bundles.
 - Mediacom is focused on HSB from a promotional perspective, and all offers associated are with high speed data products. The messaging is primarily on superior speed, performance, and reliability. They sell in the video for customers who want it but not much time is spent promoting in the market. Mediacom relies on their sales channels for selling in video and reps are incentivized for this. Mediacom has some initiatives around launching an IT video solutions as well as partnerships with OTT.
- Targeted Internet-Only Customer Packages?
 - Charter has spent a lot of time and energy on reaching consumers "where they are" and providing the opportunity to test packages before going into a subscription. Charter has gathered learnings from these experiences and could possibly share on a future call.
- Tactics to Generate Upsell Opportunities
- What is the right positioning of the message for acquisition in general?
- OTT

Next Steps

- CTAM to email group to confirm topics + schedule a monthly call through September 2020.
- Charter to share insights on targeting on a future call

Call Notes – April 28

Welcome/Roll Call

Deepa Venkataraman welcomed the group and gave an overview of the call agenda.

Call Attendees:

Colin McWhinnie, Shaw
Dianne Schanne, Mediacom
David Gray, Charter
Pedro Pinheiro, Altice
Sidd Negretti, Cox
Deepa Venkataraman, CTAM
Ariane Guardarramas, CTAM

Group Discussion: What are your current priorities in light of the current market factors, specifically COVID-19?

Altice

Altice is doing well from a growth perspective amid the pandemic. They have been able to maintain installations using social distancing practices. They have noticed people have moved from the city in light of the virus and into Altice footprints and thus has increased installs.

The issue they are continuing to face, but is now more pronounced, is that customers are taking internet-only packages.

Altice is now seeing a slowdown in recent weeks of overall growth. perhaps due to customer financial situations resulting from pandemic business shutdowns.

In the West there has been strong growth, largely from internet-based customers, and take rate of high speeds (gig speeds). Altice Advantage for low-income customers has been given away free and is not included in the growth figure. Altice is now figuring out how to migrate these customers into paying customers.

For retention of new customers gained from the pandemic, Altice is working toward retention plans, but it is still too early to have any plans set in stone.

Charter

Charter has many of the same trends as Altice. Charter has received a very high volume into its call centers, which has been challenging. Charter has shifted to self-installs only. Mobile has also faced challenges due to lack of traffic in retail stores.

Charter has implemented seasonal offers for small business owners who have faced hardships amidst the pandemic.

Charter has retention plans in place for two-month educational offers. For longer-term business retention, Charter is in planning stages.

Cox

Cox is working on 3 efforts to retain new customers gained amid the virus:

1. Looking at lower-end customers through the Keep America Connected pledge and putting into place education and reactivation efforts for when the promo ends.
2. Looking into the second half of the year and a possible resurgence of the virus in the Fall and how to help customers stay connected
3. Expanding what they consider the affordability target – determining what services customers need, reconsidering long-term customer value and what they can do to get customers in the right bundle as customers transition.

Mediacom

Mediacom is partnering with school districts in their footprints to provide Internet service to low-income households. The school is providing the laptops and paying for the Internet service, but Mediacom is waiving install fees, etc. Each school has a customized approach and design to the issue and is looking at this as a long-term solution to ensure all students have access to the Internet.

Mediacom is working on how to communicate the assistance program to school districts but wants to ensure schools understand it is a partnership – currently, there is any marketing for this service in the marketplace.

Mediacom does not have self-installs so to make installs easier they have gotten innovative and actually have techs standing outside a home and walking a customer through the install via phone. They are limiting installs to one box and local broadcast only for now.

Mediacom has seen some drop-off from peak but is still at a high take rate (internet still at 40% higher than normal). Attach rate for video is very low (25% on internet).

Mediacom has found the virus has been a reason for customers to upgrade to higher Internet speeds.

Shaw

Shaw is now providing self-installs almost exclusively. Gross sales and disconnects are down. Shaw saw a slight growth in 1P and a shift to month-to-month internet plans. Video on demand has significantly increased.

Many “snowbird” accounts came back early in March versus their usual time in April and May.

Shaw has not changed their onboarding contract. They temporarily paused disconnects and waived fees for people changing their contracts.

Shaw is seeing a decrease in sales, now possibly due to Retail being shut down and door to door sales paused.

Next Steps

- The group will plan to continue the COVID-19 impact discussion on the next call.
- Reminder: Please reach out to CTAM with any questions or topics for group discussion.

Call Notes – July 28

Welcome/Roll Call

Deepa Venkataraman welcomed the group and gave an overview of the call agenda.

Call Attendees:

Altice - Pedro Pinheiro
Charter - David Gray
Cox - Scott Sandall
Cox - Sidd Negretti
Mediacom - Dianne Schanne
Shaw - Colin McWhinnie
Deepa Venkataraman, CTAM
Ariane Guardarramas, CTAM

Cox Presentation on “Thoughts around emerging post-pandemic segments”

Sidd Negretti and Scott Sandall, Cox reviewed the attached [presentation](#).

Cox has been working to understand consumer insights during these last several months where the pandemic has changed behaviors. The following consumer insights were gathered during their research:

- Need for speed, reliability and Wi-Fi coverage still is paramount
- Using devices simultaneously is happening more often – homeschooling, remote workers, etc.
- Growing consumer importance for both download and upload speeds
- More consumer interest in optimizing internet speed and security

Cox also noted that the impact of COVID-19 has caused outlooks on Bundles to change. Consumer budgets have changed but also the need for working and learning from home. This will influence what bundles customers choose.

To address these changes, Cox is working on two market solutions.

The first would be a “Work from Home” bundle that includes higher speed, panoramic Wi-Fi modem, Cox Complete Care (3rd party tech support) and data usage unlimited plan. This would be transactional

The second would be to deploy a two-modem solution for certain homes – for example, one modem for work and one for family usage/homeschooling, etc. This would allow separate, dedicated Wi-Fi and security for households. Cox’s technology team, so far, does not think there will be any issues with competing SSIDs in household’s who integrate two modems. There could be concern with network congestion, but Cox will exclude nodes where there are high levels of congestion to avoid customers having issues with this product.

Group Discussion: Pandemic-related shifts in perception on the bundle

Altice

Altice has not developed any specific products/ bundles because of the pandemic.

Altice has seen lower sales volumes in July then they have in the past few months.

Altice feels there is still room for video in the bundle; as streaming grows, how can we add value to broadband., and maintain the segment that values video (at a lower price point than what they currently pay?

Altice notes the triple play continues to decline overall but feels if it is positioned right in some channels it can be an added PSU. A phone add-on has helped in slowing down ARPU decline, adding in dollars.

Charter

Charter still has good sales momentum, but they do see differences in how things are playing out in legacy Charter versus legacy TWC and Bright House areas.

Cox

Cox has a bifurcated approach currently to the bundle, focusing on premium and access to sports content, and switches from the legacy product to Contour X.

Cox also has an internet-only prepaid solutions for customers who need to manage their budgets monthly. Cox is exploring whether to add other components to the prepaid solution – primarily streaming video.

Mediacom

Mediacom has seen sales volume slowly decline since the highest activity peaked in April. However, they are still at a 6-7% higher sales rate YoY.

Mediacom almost exclusively promotes their Internet services and that will remain their focus. However, Mediacom will always have their linear video product that can be added to Internet. They will look to add value to assist customers in managing their video content through their internet pipeline.

Shaw

Shaw relaunched their entire internet rate card in late May. This allowed Shaw to provide an expanded option of services for all consumers. These options include two high end products with Gig service as well as a basic internet service. There is also the same “everyday pricing” for new and existing customers. With those changes they have seen great results – many consumers opted for Gig services including many from their existing base.

Shaw is focused on Video attach rates now that their internet product is performing strong.

Next Steps

- The group decided to wait to have the next call until after the summer. The next call was scheduled for September, however no further calls were deemed needed by group members.

CCPA/Privacy

Participants

Charter – Scott Cowperthwait

Comcast – Katie Lubenow

Cox – Charles Scarborough

Cox – Chris Shaffer

Cox – Wendy Rosen

Mission/Overview

This team was formed in 2019 to collaborate on preparations for CCPA implementation. 2020 focus shifted to a broader perspective on cable’s adherence and fidelity to consumer privacy. CTAM reviewed privacy policies of Charter, Comcast, and Cox to identify consistent topics and themes. Several important policies are common to all three - although expression of policies differ somewhat - including:

- You have a right to privacy/we recognize your right to privacy/we value the trust you place in us when you use our products & services
- We safeguard the information we collect
- We do not sell personally identifiable information

Members from these companies are considering whether the industry has a collective opportunity to proactively communicate about its care for consumer data and, if so, how such messaging could be addressed.

Year-End Summary

No team calls were held. CCPA/Privacy group participants considered whether the industry has a collective opportunity to proactively communicate about its care for consumer data. Members decided not to pursue further action at this time.

5G

Participants

Charter – David Gray
Comcast – Cheri Davies
Comcast – Eileen Diskin
Comcast – Ginny Too
Comcast – Jim Powel
Comcast – Peter Intermaggio
Comcast – Sarah New
Cox – Jennifer Rich
Cox – Wendy Rosen
Mediacom – Dianne Schanne
Rogers – Sameer Sheth
Shaw – Lisa Cooke

Mission/Overview

The 5G group started in 2020 with best practices for messaging vs. fixed in-home 5G by documenting current MSO activity in the space and collecting existing research and analysis on early 5G rollouts. The group is now working on messaging - specifically, a common vocabulary we can use that tells the industry's great story about the robust fiber-based networks and the superior broadband services riding on those networks.

The phases and timing of messaging will vary by MSO depending on product set, competition in the local markets, etc. but generally fall into two main phases:

- | Telling the best story of our networks and broadband services, shoring up speeds and network performance, and generally cementing the existing base.
- | De-positioning mobile 5G as a viable substitute for in-home broadband and de-positioning fixed wireless in-home 5G.

Year-End Summary

The group began mid-summer, discussing 5G competitors in each member market. Cox readout of 5G research in late summer revealed three keys to defending against 5G: focus on low cost/flexibility; redefine the enemy; and make it easier (and more compelling) to do business with Cox. T-Mobile was identified as the 5G competitor to watch, with the noted weakness (opportunity) that consumers tend to find that 5G is not what they thought it would be.

For now, Comcast's message for 5G will be that it is not an adequate replacement for in home internet – the safe bet is your ISP.

Agency Hatch130 has been engaged to help define the messaging framework for 5G. This includes both an umbrella message and a set of proof points that work across the broader audience; sub-messaging statements and proof points will be more focused on different segments' needs/interests. Hatch initially

identified 3 groups most likely to consider switching to 5G: Movers, life-changers, and remote workers/learners and presented an initial framework in September. On a subsequent call, Hatch130 presented messaging touchpoints to combat 5G, using the Mover audience as the target. Once concepts are defined and approved by the 5G group, Hatch will message test consumer-facing messaging and creative.

The goal is for CTAM to use the [5G Messaging Framework & Execution](#) recommendations in the Industry Positioning effort as well as with the Mover Program. Additionally, MSOs will have this messaging to inform and add to their own work.

Call Notes – July 8

Welcome/Roll Call

Mark Snow welcomed the group and provided an overview for the call.

Call Attendees:

Charter – David Gray
Comcast – Peter Intermaggio
Comcast – Sarah New
Cox – Jennifer Rich
Cox – Wendy Rosen
Mediacom – Dianne Schanne
Shaw – Erica Shield

Background:

The 5G Team was developed by a request from the CTAM Co-op Board. The CTAM 5G Team was formed in 2019 and has met to discuss best practices for competitive messaging around 5G.

The purpose of today's meeting is to discuss the group's scope for future topics and where the group will be going coming out of the COVID-19 pandemic.

Group Discussion

Comcast

Comcast is focused on positioning and messaging around the product level. Comcast is most focused on T-Mobile as a competitor. Comcast's standard competitor playbook strategy includes – positive messaging around their own internet product, how to deposition their competitor's offer and what they can do to go after T-Mobile and convert mobile customers.

Comcast is exploring T-Mobile offering – and notes that T-Mobile's 5G is the slowest 5G - so Comcast is considering whether to deposition them as the slowest of the 5G offering. In testing, T-Mobile's 5G is only marginally better than 4G.

Comcast conducted research on 5G installs in test markets – it was difficult to find consumers to get the 5G service, but once they found eligible service locations, they found 5G installs took 6-8 hours with one install taking 2 days, but these install times have since improved. In Houston, TX for those with hurricane double pane windows, they found that they create signal issues. However, for the consumers who have been installed they have been pleased with the service.

Comcast noted that in Verizon's playbook, one strategy is to offer 3 months free service to consumers and Sonic, as a tier 2 provider, is using this strategy as well.

Comcast feels the scope of the group should be around product messaging and it would be helpful to create an Executive narrative.

Cox

Cox does not have a 5G communications strategy yet. However, Cox feels there are many ways to capture consumer's attention around why they may not want 5G and Cox will be thinking of products to put forward as competitive alternatives to 5G. The potential concerns to consumers could be tethering devices, weather related connections impacts, expense, etc. and other hurdles that consumers will have to go through to accept a new alternative.

Mobile substitution is a low-end demographic for Cox which is counter to what 5G is – there is a differing opinion within in Cox on how 5G will influence that. Cox feels 5G fixed wireless will have impact from Verizon from a competitive standpoint but feels it will be limited for a while.

Shaw

Shaw launched their Gig speed internet in late May. They introduced a whole new tier of speeds and has changed their name to Fibre+ Gig. Shaw does not have the fixed home 5G competitors that the USA has so they are in a very different situation than others. They would like to continue to be a part of the share and learn conversation but will not take a lead role as the dynamics are very different in Canada for this initiative.

CTAM

Mark Snow noted that Gaston Vaneri of Cox contacted CTAM with an idea to buy ad space around consumers who are doing speed test on Ookla. Therefore, CTAM has licensed the Ookla speed test, under private label, and has added it to the Smartmove.us website. CTAM will begin buying ad space around speed tests to draw consumers in to educate them on why an old cell phone will not reach gig speeds, etc.

CTAM's annual Mover Study will be completed this month, being that there could be enough sample for 5G questions, CTAM could add a recontact study to add specific questions around 5G.

Action Items/Next Steps

- To view Cord-cutting Mitigation messaging CTAM has created, please visit www.smartmove.us/choice
- CTAM to send the group the CTAM Broadband Study (emailed by Mark Snow on July 8)

- CTAM to poll group for the best day/time for monthly calls.
- Possible topic for next call
 - Show/Tell on Research work done on 5G

Call Notes – August 19

Welcome/Roll Call

Mark Snow welcomed the group and provided an overview for the call.

Call Attendees:

Charter – David Gray
Comcast – Peter Intermaggio
Comcast – Ginny Too
Comcast – Jim Powel
Comcast – Sarah New
Cox – Wendy Rosen
Mediacom – Dianne Schanne

Cox 5G Research Readout

Wendy Rosen, Director, Consumer Insights, Cox presented the attached [Cox's 5G Research overview](#).

Highlights include:

- Cox completed an online survey among 1,949 internet subscribers in their footprint to size and define the 5G target market by understanding those consumers most likely to switch to 5G solutions.
- There is a high level of overlap among consumers interested in both 5G Cellular and 5G Fixed Wireless.
- Consumers find benefit in assumed cost savings and faster speeds, but express concerns with having to purchase a new 5G capable phone, trying unproven technology and exceeding data plan limits.
- Consumers find similar benefits with 5G Fixed Wireless; In addition to unproven technology, 5G FW causes some concern about line of sight & number of homes in service from single transmitter.
- Cox found seven themes in the data that can inform 5G defense. Each theme is supported by a target consumer profile.
- Defending Against 5G:
 - Focus on Low Cost/Flexibility
 - Redefine the Enemy
 - Make it Easier (and more compelling) to Do Business with Cox

Industry Analyst Take on the State of 5G Today and Tomorrow

Mark Snow provided an overview of the attached [excerpts from a recent discussion with Industry Analyst, Jonathan Chaplin of New Street Media](#) which detailed his take on the State of 5G.

How are MSOs Approaching 5G for now?

Comcast

Comcast sees T-Mobile as the near-term threat with regards to 5G because of their coverage and wiliness to make big plays as well as their strong brand and customer loyalty.

5G is a risk and opportunity area but how so we think about T-Mobile – what is unique to T-Mobile versus other 5G competitors? Comcast feels there is a win back opportunity as consumers find 5G is not what they thought it would be.

For now, Comcast's message for 5G will be that it is not an adequate replacement for in-home internet – the safe bet is your ISP.

Charter

Charter agrees w Comcast, T-Mobile has a different track record and approach to the business.

Cox

Cox also agrees that T-Mobile is the competitor to watch.

Action Items/Next Steps

Topic for next call:

- CTAM to provide 5G messaging concepts to review during the next call.

Call Notes – September 16

Welcome/Roll Call

Mark Snow welcomed the group and provided an overview for the call.

Call Attendees:

Charter – David Gray

Cox – Wendy Rosen

Mediacom – Dianne Schanne

Rogers – Andre Martineau

5G Messaging Framework Overview

Scott Lilly, Hatch 130, presented the attached [5G Messaging Framework overview](#).

Highlights include:

- 5G was assessed in the following areas:
 - Infrastructure/Safety
 - Security
 - Expense
 - Time
- Hatch 130's assessment covered both wireless and fixed 5G with the latter being the biggest competition for MSOs.
- There are several reasons why Broadband-Based Wi-Fi is best
 - Reliability
 - Accessibility
 - Simple
 - Secure
 - Safe
- Groups most likely to consider switching to 5G include:
 - Movers
 - Life-Changers
 - Remote workers/learners

Group Discussion

- Cox mentioned during their research they found that “performance first” – tech savvy, early adopter consumers were most likely to try 5G – they asked if the groups identified by Hatch included those types of consumers. Hatch confirmed indeed some early adopters are included in their groups identified as most likely to switch.
- Mediacom asked if the group believes the two technologies of 5G Mobile and Wi-Fi could co-exist. The group agreed they could co-exist as 5G Mobile is not the right tool for working at home, etc. whereas that's where broadband in the home takes precedence.
- The group also discussed whether the message and benefits should be the same across the groups likely to consider 5G and determined the benefits will be the same and there should be general umbrella messaging for all groups but could have additional specific messaging for certain target groups.
- Mediacom feels speed and reliability are the standard benefits of broadband and that a new vocabulary to discuss speed and reliability would be needed to combat 5G. Hatch will be working on how to speak to consumers on 5G and what fresh verbiage to use for forward thinking and positioning.
- Hatch asked the group if they were on track with building the 5G framework and if they are any items they may have missed - Cox noted the urban millennial profile is more transient in many more ways with regards to careers, families, etc. They also saw a group who were focused on data consumption.

Action Items/Next Steps

Topic for next call:

- Continue to discuss 5G Messaging Framework.

Call Notes – October 14

Welcome/Roll Call

Mark Snow welcomed the group and provided an overview for the call.

Call Attendees:

Charter – David Gray
Comcast – Sarah New
Comcast – Peter Intermaggio
Comcast – Ginny Too
Cox – Sidd Negretti
Cox – Wendy Rosen
Mediacom – Dianne Schanne
CTAM – Mark Snow, Deepa Venkataraman, Renee Harris

5G Messaging Framework Overview

As a follow up from our September 14 call, Hatch 130 has developed messaging touchpoints to combat 5G. Scott Lilly, Hatch 130, presented a 5G Messaging Touchpoints Overview. Hatch used the Mover audience as the target to develop these touchpoints.

Highlights of the presentation are as follows:

- Messaging Touchpoints include:
 - **Reliability** – several different taglines for this touchpoint
 - **Connectivity** – one of the critical touchpoints – “Home is where the connection is”
 - **Empowerment** – Consumers have a choice, so we want to give them all the information and tools they need and *empower* them to make the right choice.
 - **Security** – Data and privacy are of utmost importance now more than ever so consumers want to know they will be protected.
- Audiences include:
 - Movers
 - The Life Changer
 - The Remote Worker/Learner
 - The Late Adopter

Group Discussion

- Comcast noted that in Security messaging it should be specified that it is for the consumer's **home network**.
- Comcast feels the themes and messaging presented are in the right place for the mover audience. To combat 5G, Comcast will lean in on Speed, reliability, and security. Comcast feels T-Mobile, in these early days of 5G, will not have speeds to compete.
- Charter also agrees the messaging work is aligned with their current work and thinking.
- Hatch 130 asked the group if the messages presented would resonate with existing customers. Comcast stated the themes are correct and messages work for movers because movers are a

shopping audience but does not feel they would necessarily convert the base. Comcast is constantly reinforcing value to their existing base; so, for them, these messages are aligned, but not additive.

- Mediacom asked how MSOs might speak about their cable internet versus anyone participating CBRS bidding spectrum, and is there anything in this 5G conversation that might affect the discussion? Hatch 130 advised that they did not take this into consideration when developing the messaging. The focus is on broadband, and how to tackle 5G as it becomes more prominent in the press and consumer mindsets.
- Cox feels the themes are aligned with their work but would like to discuss further internally and share the presentation with appropriate creative team members.

Action Items/Next Steps

- Any additional feedback to be shared by early next week. Next call will be held in November at which time final go-to-market creative/messaging will be reviewed.

Digital Retention

Participants

Armstrong – Peter Grewar
Cable One – Nanci Campbell
Charter – Jennifer Garrett
Charter – Kathleen Griffin
Charter – Roseanna Underwood
Comcast – Dina Pappas
Comcast – Ken Flynn
Cox – Tony Maldonado
Mediacom – Eric Schoenfeldt
Rogers – Mehrzad Ghassemi

Mission/Overview

MSO member representatives are engaged in monthly discussions to offer best practices, findings, and testing. Mission for 2020 is to focus on efforts to transition retention to the digital realm. Specific subjects include work efforts to digitize onboarding and welcome processes (and associated documentation), moving online the efficient presentation and processing of choice to customers who are rolling off promotions, the measurement and value of product engagement in retention efforts, loyalty programs and the retentive impact of incorporating streaming services into the video delivery platform.

Year-End Summary

Retention is a long-running topic group for CTAM MSO Members. This team, regardless of changes in composition, always seems to find plenty to discuss and many best practices to share. The group has kept a running list of subjects of interest this year and will likely use it as a jumping-off point for 2021 planning. Topics affirmed/reaffirmed in December appear first in this list.

- **RETAINING THE COHORT OF BROADBAND CONNECTS DURING COVID ONCE THE PANDEMIC ENDS**
 - Continues to be of interest although most companies pleasantly surprised by progress of these customers
 - Several indicate they have not seen expected degradation/churn and that non-pay cure rate has been better than expected
 - Some companies have paused non-pay processing for certain connects and/or implemented new payment options (e.g., 3/6/9/12 month plans)
 - Geographic requirements also differ for handling
 - Themes seen are of interest as these efforts progress to retain new broadband connects progress
- **HOW TO RETAIN BROADBAND-ONLY SUBS**
 - Should be no such thing: all should have Flex (IPTV box) and/or Mobile?
- **HOW TO BEST MANAGE PLATFORM MIGRATION FROM LEGACY TO ADVANCED STB**
 - How best to do this; how fast; forced migration options?
- **PROACTIVE RETENTION**
 - Mining network and product performance metrics to mine who is at risk and proactively retain them; how to do this while keeping costs down; avoid “poking the bear”
- **AGILE MARKETING**
 - Several members are interested in pursuing a presentation/discussion of implementation approach/pitfalls with an experienced practitioner
 - NOTE: Cindy working to identify outside speaker
- **LOYALTY PROGRAMS**

- Surfacing again at Cox, particularly in light of 5G
- Comcast's plans have continued to advance with stronger digital components
- Ken & Dina willing to present re: Comcast's loyalty program plans on a call
- CHANNEL MIX OPTIMIZATION
 - Mehrzad raised this and considers it a sub-topic of transitioning functions to the digital channel
- APPROACHES TO TRADITIONAL VIDEO SERVICES VS. STREAMING VIDEO SERVICES
 - Recognition of importance of keeping a video platform in house (e.g., providing on-screen home security notices)
 - Interest in whether it is a stabilizer if we integrate additional streaming video services into platform? (Cox beginning to get learnings)
- SELF-INSTALLS
 - Dramatic increases in light of COVID-19 procedural requirements
 - What findings, process improvements, etc. have members identified for self-installs?
- PROMO ROLL-OFF
 - Cox is re-packaging entire account to a single roll-off date rather than upgrading individual services a la carte
 - Testing of communication proactivity and messaging
 - Clarity on primary objective of promo roll-off handling is important
 - Cox and Rogers are willing to present on promo roll-off approaches
 - NOTE: Will incorporated some aspects into September call (digital transition)
- PRODUCT ENGAGEMENT
 - Share notes on product engagement
 - Of the various feature functionalities, which drive benefit, stability, retention
 - E.g., Voice remote use, app download/use
- ENGAGEMENT WITH OTHER CTAM TEAMS
 - CTAM can connect this team to other CTAM teams if useful/when important topics arise
 - Teams include Sales, 5G, C5 (Care & Customer Experience Collective), Movers
- TRANSITIONING RETENTION EFFORTS TO DIGITAL SPACE (was September call focus)

Call Notes – May 22

Welcome/Roll Call

Call Attendees

Armstrong – Peter Grewar
 Cox – Tony Maldonado
 Mediacom – Eric Schoenfeldt
 Rogers – Mehrzad Ghassemi
 Cable One – Nanci Campbell
 CTAM – Cindy Mirabella, Mark Snow

Background

- The Retention team was chartered 2014 and is the longest running CTAM team except Advanced Products Council
- Original 2020 direction from Co-op Board was to home in on digital retention (examples):
 - Self-service upgrades/downgrades
 - Self-service care, education
 - Personalization of digital services based on ingested usage data to increase sat/retention
- More recent direction: Focus on retention of new (COVID-19 era) broadband connects
 - What do we know about their motivations for subscribing?

- How should this information influence our strategies and approaches?
- In addition, have we learned information to help in reclaiming lost video subscribers?

Summary of Discussion

- “Digital” retention can be viewed as a means to an end – a component and tool by which to address retention of new connects
 - Roll-off and re-packaging notices/offers/servicing
 - Upgrade offers & efforts to sync customers to single promotional end date
 - Engaging Connect2Compete customers in digital channels to manage costs (e.g., promotion ending, click for options)
- Specific issues of the COVID-19 era include customers running higher-than-normal balances
- The two flavors of video offered by some MSOs deserve separate attention:
 - Traditional video services (e.g., Cox Contour/C2, Xfinity X-1)
 - Cable streaming services (e.g., Comcast’s Flex) – “video experience” services, in Cox’ terminology
 - Netflix and other video services can be attached, integrated search benefit
 - Is accounted for as internet-related (vs. video-related) revenue by some MSOs
- While the market for traditional video is shrinking, streaming video can maintain the video experience in the home, and the connection to the family “screen”
- Mark reviewed research recently commissioned from Harris: CTAM COVID Broadband Adoption Study
 - An updated/annotated report is attached
 - 80% of new cable broadband subscribers report they will stay (higher than for telco)
 - Many of the moves seen in recent two months were “forced marches” (consolidating HH with parents, roommates)
 - Messaging and product around high-bandwidth, fast broadband is valuable for the more economically able

Preferred Approach for Retention Team Going Forward

- Monthly call (Cindy soliciting for standing date/time)
- ***Participants come to call prepared to share***
- Balance practical “what we’re doing” with time for strategic discussion
- Integrate digital efforts, including practices in handling promo roll-off
- Explore Agile marketing and design thinking methodologies

Call Notes – July 9

Welcome/Roll Call

Call Attendees:

Peter Grewar – Armstrong
 Nanci Campbell – CableOne
 Roseanna Underwood – Charter
 Dina Pappas – Comcast
 Tony Maldonado – Cox
 Mehrzad Ghassemi – Rogers
 Cindy Mirabella, Mark Snow – CTAM

5G

- Mark recapped a call with CTAM’s 5G Team, which is considering the virtue of finding commonality in message positioning against 5G

- Verizon's 5G playbook is 3 months free
- Install is hours long, but a Comcast study found customers have high degree of sat with the service itself
- Comcast likely has the most 5G in footprint but still limited coverage of 5G so even research is difficult
- In markets where 5G is available, high-value/high-risk cable HSD subs who exhibit a drop in usage may have "one foot out the door and the other on a banana peel"
- Executing on retention vs. 5G is a potential focus for this team
- Good work on this topic by New Street Media (we are still looking for this report to forward to you!)

Roundtable

- Cox working on taking retention efforts into digital realm
 - Engaging digital team deliberately in retention efforts, along with pricing/analytics, tech team
 - Campaign roll off-repackaging via email with links to options (good, better, best)
 - Trigger programs for base subscribers in fiber expansion market – click here for more value in exchange for contract
 - Trialing chat with reps who have access to suite of retention offers
 - Testing allowance of up to \$25 for customers to shed revenue online, e.g. downgrades
- Rogers pausing on channel shaping during COVID-19, but otherwise focused on:
 - Cost and revenue differences by channel, e.g. field sales events at big box stores involve rock bottom pricing and drive subsequent switching activity
 - Defining desired mix of channels
 - Migrating people to digital platform (currently perhaps less than 10% of acquisition – Canadian online purchase behavior lags vs. U.S., Rogers' focus/capabilities plus existing wireless/retail opportunities)
 - Door-to-door proportion high – 40%-plus
- Comcast COVID-19 response effort has been extensive, have also:
 - Identified 8 high-risk segments
 - Partnering with collections on an Xfinity assistance program to keep call centers from being bombarded
 - Differential handling of customers based on profile, e.g., those chronically in collections vs. unique situations related to COVID-19 (amnesty, payment plans, etc.)
- Charter also dealing with a lot of moving pieces, different scenarios across footprint due to COVID-19
 - Addressing digital adoption, too – company-wide effort
 - Specifically focused on onboarding, including reducing print materials then and throughout the lifecycle
 - Experienced "seismic shift" in self-installs last several months
- Comcast, Cox and Charter all seeing good balance catch-up/cure rates so far related to delinquencies/suspensions
- Tony asked if anyone has pushed franchise-required notifications from print to digital format
 - Charter did this pre-COVID-19

Call Notes – August 13

Welcome/Roll Call

Call Attendees

Nanci Campbell – CableOne

Roseanna Underwood – Charter

Ken Flynn, Dina Pappas – Comcast

Tony Maldonado – Cox

Eric Shoenfeldt – Mediacom

Mehrzad Ghassemi – Rogers

Cindy Mirabella, Mark Snow – CTAM

CTAM's Annual Mover's Study

- Mark provided preliminary observations on this year's study, just out of field
- AT&T had a very strong last 12 months (2H19-1H20) in gigabit internet
- High sell-in of gigabit internet and home automation
- Once available, we will share study data with this team, as well as complementary data from Bruce Leichtman

Running List/Review of Topics of Interest

We reviewed topics in which members of this team has expressed interest in focusing, in order to develop plans for productive calls remainder of 2020

- TRANSITIONING RETENTION EFFORTS TO DIGITAL SPACE
- AGILE MARKETING
- LOYALTY PROGRAMS
- CHANNEL MIX OPTIMIZATION
- RETAINING NEW COVID-19 BROADBAND CONNECTS
- APPROACHES TO TRADITIONAL VIDEO SERVICES VS. STREAMING VIDEO SERVICES
- SELF-INSTALLS
- PROMO ROLL-OFF
- Engagement with other CTAM teams

Call Notes – September 10

Welcome/Roll Call

Call Attendees:

Kathleen Griffin, Roseanna Underwood – Charter
Tony Maldonado – Cox
Eric Shoenfeldt – Mediacom
Cindy Mirabella, Mark Snow – CTAM

AT&T Gigabit Internet Update

- Mark provided an update on AT&T
- Growth of 900K gigabit internet subs between 3Q19-2Q20
- Still lost subscribers (presumably on lesser internet offerings)
- Appear to be doing great job of upgrading existing subscribers
- Per MoffettNathanson, leadership change could modify where they place bets; it's possible they could focus on fiber again
- AT&T is the largest non-government issuer of debt worldwide

Digital Transition (primary topic)

- Roseanna (Charter) - Migration of customer welcome experience from print to digital delivery
- Began a journey in 2019 to re-vamp welcome process, with FCC rule changes regarding notifications
 - Charter digitized materials that had had previously been printed *en masse*
 - Communication is immediate
 - Communication to new connects at time of work order OPEN is a key tenet
 - Emails are captured at the point of sale
 - On demand print and fulfillment daily via outside vendor close the gap where email not provided or hard/soft bounces occur
 - Customer can request and rep can then trigger at any point in tenure

- Now that products have been more standardized, additional customer-based segmentation of materials is also possible
 - Name personalization plus beginning to better understand/apply knowledge of app use, auto-pay enrollment, etc.
 - Significant amount of subject-line testing
- Looking for ways to continue and fully automate, remove paper entirely from the field trucks
 - Reps have mobile devices but some aspects of engaging them in this effort would be significant technical lift

Eric (Mediacom) – Onboarding and the welcome guide

- Eliminated the costly printing of a 30pp welcome guide
- Put the guide online and include a link in the welcome email
 - Additional benefit of ability to keep up to date so most current information always accessed by customer
 - Customers can request paper copy
- Email includes links to customer agreement, welcome guide, and app
 - 54% open rate
 - 18% click through rate
 - Less than 1% unsubscribe rate
- Effort made to keep it simple – including too many calls to action prevents customers from engaging with the email
 - E.g., same email does NOT link to channel lineups

Tony (Cox) – Digital marketing for roll-off/repackaging; Connect2Compete; Trigger programs; Chat trial

- Working to digitize retention efforts across the board
- Roll-off is a key churn trigger and has always received a lot of attention
 - In past, have capped roll-off increases, since the higher the increase, the higher the call-in rate, churn and subsequent discounting
 - Have also observed in past that notification prior to roll-off accelerated churn for about 4 months
 - Now are communicating upcoming roll-off in digital and giving customer options:
 - Keep what you have
 - Repackage for more value, i.e., Good (~\$5 less), Better (~\$5 more), Best (~\$10-15 more)
 - Customers are re-packaging in a way that overall revenue is better
 - Call-in volume and churn are improved
 - Existing customers can re-package entire account online at any time
 - Sequence offered is based on customer feedback in response to a small number of questions and options presented
 - Value enhancements are around channels, speed – products and tiers within products
 - Have switched from a product guardrail to a revenue guardrail (now allowing PSU drops online)
 - Customers can repackage more than once, but those on contract have to renew at the time
- Engaging Connect2Compete customers in digital channels
 - Program is part of Keep Americans Connected Pledge
 - Offer is in the public realm - \$9.99
 - Many subscribers have no other products
 - Built online experience for these customers:
 - Keep \$9.99
 - Upgrade to Internet Essential
 - Disconnect
 - First time ever allowing online disconnect
 - Far fewer than expected are disconnecting, and more than expected are upgrading
 - The number/percent who have gone online so far is lower than expected

- Trigger programs for base subscribers in fiber expansion market
 - Proactive marketing done in areas where fiber is entering
 - In return for signing a two-year contract, customer gets next internet tier for no additional cost
 - Marketed in a way that avoids CPE switch
 - Measurable decrease in churn has resulted, and program has strong ROI
 - Program is very effective, and pushing to digital will allow increased scale and reach (leveraging same process as done for Connect2Compete)
- Chat trial
 - 40-60 chat reps can handle everything done on a call
 - So far seeing KPIs similar to inbound retention phone queue
 - Currently adjusting technology to allow reps to have multiple occurrences of open accounts in ICOMS to increase efficiency
 - BOT offers chat to customers who initiate certain searches on site

Call Notes – November 12

Welcome/Roll Call

Participants

Peter Grewar – Armstrong
 Nanci Campbell – CableOne
 Roseanna Underwood - Charter
 Tony Maldonado – Cox
 Mehrzad Ghassemi - Rogers
 Cindy Mirabella, Mark Snow - CTAM

Engagement/Usage Behavior and Effect on Retention

Agreed-upon primary topic, was suggested on September call

- **Cox**
 - Consider engagement a rich area, planning to pursue even further
 - Want to identify the analytics the specific product/feature usage that lowers churn
 - Confident that analytics to date are very rigorously completed
 - Engagement analysis fits into triggers and stabilizers framework
 - Triggers and stabilizers are analyzed by product set, channel interaction
 - Also analyzed by some service plans, even credit class
 - Engagement at broad level includes non-product engagement
 - These stabilizers include agreement/contract, use of EZ Pay, registration and moderate use of My Account portal
 - Excess use of My Account portal appears to be a churn trigger (customer weighing options, looking at price comparisons)
 - Cox Complete Care
 - Important to identify situations where use data not available and pursue if possible
 - **Have learned from Comcast team that use of voice remote is a stabilizer**
 - Some stabilization actions characterized as “non-regrettable” – can be applied across the board, regardless of tenure
 - Internet stabilizers
 - Panoramic WiFi (advanced security, enhanced WiFi)
 - Stabilizes accounts with >15 months tenure but doesn't have same impact on those <15 months
 - Considered non-regrettable, and pursued with all subscribers/connects
 - Uptier activity
 - Video stabilizers
 - Contour2 (Comcast X-1 platform)

- **DVR use**
 - Presence of premiums
 - Phone stabilizers
 - Uptier
 - **LD usage**
 - **Whether used or not in general**
 - Significant finding that education work with customers is at the top of investment/payback of marketing activities
 - Brand marketing is also important
- **Rogers**
 - **SVOD and OTT use both generate churn improvement IF these services are accessed through the platform**
 - Results are significant – worth getting customers to use the services
 - Screen savers promoting reminders/stimulation of use are employed to promote product engagement
 - Also using YouTube videos (excellent view-through) to encourage engagement – just say “help” into the remote
 - These videos also available on on-demand streamer
 - Churn propensity models incorporate low-med-high usage measures, whether customer is on offer or not and how rich offer is
- **Charter**
 - Video viewing data used with app/IP-based products
 - **No usage in first 2 weeks predictive of higher product churn**
 - Analyzing what a drop in usage activity precedes
 - Usage data has been incorporated in targeting some communications but hasn’t resulted in additional customer response
 - A welcome email series launched last summer has generated better engagement and retention
- **Armstrong**
 - Have seen some of the phenomena mentioned
 - Limited analytic resources
 - Have enhanced Wi-Fi product, and looking into other stabilizers

Call Notes – December 10

Welcome/Roll Call

Kathleen Griffin - Charter
 Roseanna Underwood - Charter
 Dina Pappas - Comcast
 Ken Flynn - Comcast
 Mehrzad Ghassemi - Rogers
 Peter Grewar - Armstrong
 Tony Maldonado - Cox
 Mark Snow - CTAM

Member Presentations: What is the impact of offering mobile services on customer retention?

COMCAST:

Early on, most wireless connects were with existing 3P subs; today that has shifted somewhat to include more broadband (BB) only subs. This tends to be more of the newer BB only subs vs. the long-tenured ones.

Retention offers for the first time launched around the time of the new Apple iPhone release.

Offering incentives to new BB only connects to add mobile in the first 90 days.

Pandemic BB connects - concern about long-term. Will they return to mobile only? Chance to get them to add Xfinity Mobile and/or Flex between now and the end of Pandemic when people start to return to work and/or school.

There is churn improvement when mobile is part of the product set.

Promo Roll-off – using mobile add-on/upgrade to non-mobile subs during the promo roll-off moment can be a very good thing - material savings and high satisfaction.

There is a way, working with a data vendor, to append wireless service information files with wireless phone numbers – contract status, carrier, pre- vs. post-paid, etc.

CHARTER:

Mobile penetration is still very low - but a lot of directional goodness so far.

Haven't fully pulled mobile into the retention flow - movers is the exception, working with the JV and CTAM's mover program.

See the best results with HH that have a mix of plans (by the GIG, unlimited). Would indicate that choice adds value, but these subs comprise the smallest segment of mobile subs overall.

Existing subs are more likely to add mobile than new connects.

Relationship churn is better with mobile.

But they do see early tenure mobile downgrade churn. Working to understand why - connect issues, confusion.

Win-back campaign - reaching out to recent port outs to get folks to reconsider and come back.

Advice for those contemplating a wireless offering:

Comcast: when launching mobile, get a hold on possible device fraud early on.

Channels in order of scale: retail, digital/e-commerce, then call centers. Out-bound TM is hard.

Topics discussed for 2021:

- Retaining the cohort of broadband connects during COVID once the pandemic ends (Mark-CTAM)
- How to retain broadband only subs – should be no such thing: all should have Flex (IPTV box) and/or Mobile (Ken-Comcast)
- How best to manage platform migration (from legacy to advanced STB) – how best to do this; how fast; forced migration options (Mehrzaad-Rogers)
- Proactive Retention – mining network and product performance metrics to mine who is at risk and proactively retain them; how to do this while keeping costs down; avoid “poking the bear” (Mehrzaad- Rogers)
- Loyalty programs – who is doing them (again) and what does success look like (NPS vs. churn) (Tony-Cox)

2021 Preview

Co-Op Board Approved Topics

- Convergence (progression of the Bundling topic): evolution towards a seamless connectivity platform in the home for consumers that is powered by broadband
- Competition: how to leverage the power of 5G in the marketplace
- Retention: focus on nurturing and the customer base across channels (phone, mail, digital, etc.) across the lifecycle
- Serviceability: Board to revisit 2019 serviceability output before deciding what 2021 focus would be and what type of SMEs should participate

Proposed Timeline

KICK-OFF CALL BY FEBRUARY 29, 2021

ONGOING CALLS BY TOPIC GROUP EVERY FOUR TO SIX WEEKS

TOPIC GROUP WRAP-UP BY SEPTEMBER 2021

YEAR-END SUMMARY PRESENTED TO CO-OP BOARD IN OCTOBER 2021

NEW TOPICS TO BE FINALIZED BY DECEMBER 2021

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CTAM Knowledge Portal: <https://knowledge.ctam.com/>

Appendix - Presentations

Analyst Take on the State of 5G Today and Tomorrow



CTAM 5G Team Call | Analyst 5G Take on the State of 5G Today and Tomorrow

Analyst: Jonathan Chaplin, New Street Media | Interview held on August 10, 2020

Excerpts from the Interview below:

There are two key themes:

1. How will the connectivity market evolve? 5G, Pandemic effect, etc.
2. What is going on in the pay tv space?

-
- The trends in these two spaces are quite different.
 - Connectivity evolution is driving the Content business.
 - There's really little value in the distribution of content beyond providing a service to your customers.
 - C-19 is accelerating fixed adoption of Internet at home. Wireless onliest, get-by types, have shifted faster to in-home bb.
 - At 80% fixed BB penetration. Adding wireless only to the mid-to-high 80s. Terminal penetration would be mid-to-high 80s for fixed and mid-to-high 90s overall.
 - 1st: Doesn't think this will reverse when C-19 ends. The need for robust connectivity will persist in the new-normal.
 - 2nd: 10-20-30-40 MB DSL is no longer considered viable given today's uses. Share loss for the telcos in areas where they don't have fiber will accelerate.
 - Breathtaking broadband growth: C-19 + DSL decline in non-telco fiber areas.
 - Acceleration of the closing of the digital divide - 5 MM households that don't have no effective BB connection - subsidies for carriers to serve. Fiber rings will be the likely solution.
 - Regardless of who wins November, this will be an important theme for the administration.
 - Too many US HH not connected. Vital to economic progress / a real policy issue.
 - Acceleration of fiber deployments in teleco areas. 5G and other things have been the Capex priority for a while, but this is likely to shift back to fiber in the coming years. Fiber penetration should grow...will create a more competitive environment for Cable.

How does 5G play into this? Not much. Will it accelerate wireless substitution? No. Capped, more expensive. Once C-band comes on-line, the caps may go up a lot. Today, there are limits, even on "unlimited plans" there is a cap around 20 GB/month. In today's HH use, this is not a solution.

Open Signal Report can be found here: <https://www.opensignal.com/2020/05/20/quantifying-the-global-5g-experience-across-ten-operators>

1



MARKETING INTEREST GROUP

VZ: high freq, high speed, low distance - 800 MBPS but short distances. MM bandwidth. 0.5% of the country can get this. Costs is very very high to deploy widely and believed to be a non-starter. Will be a niche product that will help boost capacity in dense use areas (stadiums, transport hubs).

T-Mobile: low frequency 600Mhz - propagates very long distances, but low channel width. Not nearly as fast. 40MBPS up from 30 in 4G LTE. Stand-alone 5G deployment - 250MM POPs today now and should cover most of the US by year-end.

AT&T: Hybrid 4G/5G in the 800 Mhz Spectrum - speed increases are even less than T-Mo. Hybrid network. AT&T doesn't have excess spectrum to do a stand-alone deployment.

Gen 2: T-Mo: Stand-alone 5G in the 2.5Ghz frequency. Will be super fast - 300-400 MBPS. T-Mo will be in a position to take significant wireless market share. NY, Philly, Chicago, Houston, LA. Very few devices can use this spectrum today. The next iPhone will have radios for this.

All that said, this is more about wireless vs. wireless than an attack on fixed wired in-home broadband.

VZ - fixed wireless 5G is more about goading/goosing the gear ecosystem to get mm wireless gear to a viable place.

Starry - a bigger threat for building to building than doing some sort of VZ fixed 5G play for B2B. Walls and windows are non-starters for mm. But if you can light up an MDU all at once with a single point, it can be compelling but a small market.

Focus more on the opportunity is the other direction...Fixed is 1/3 of connectivity and wireless is 2/3s. The threat to fixed from mobile is small compared to the fixed to attack mobile. Residential and commercial. MSO share gains in mobile are taking off. They are participating in the spectrum auctions - could turn that into a very potent weapon. 5G really accelerates this opportunity...being able to leverage 3.5Ghz spectrum when it comes online.

Content Business:

Traditional pay tv market is shrinking, but not at an accelerating rate, but definitely downhill at nearly a double-digit rate per year. After 2Q, it shrank 9% annualized...a bit better than year ago at 12%.

Where does this go? Where is stable share - the floor? 0, 20, 30 MM HH? Very difficult to know yet. Different generations evolving behavior as they age. Hard to predict. Will 22-somethings who become 30-somethings with a house and 2 kids change behavior? Yes. But they won't likely look like 30-40 year olds today. 45 MM HH seems the fat part of the various simulations done to predict this. So, 1/2 where we are today. 7-10 year slide.

How will business models evolve? How will the market players react and/or get ready?

OTT offerings, ad and subscription supported, will continue to grow at a rapid rate. The MSO perspective is the tv piece will no longer be really that relevant. It may be a service pass-through.

Creating a software aggregation layer that makes sense of the multitude of choice manageable is a business for connectivity companies. Much much less revenue per but way better margins (\$4.50 on \$5.00 vs. \$10.00 on \$80- and potentially way more volume.



ROKU has the EV they do because of this opportunity. MSOs need to capitalize on this – some are (Flex/X1). The winner of this space is unclear but will be hugely consequential.

Less clarity on who the ultimate winners will be on the OTT space. Netflix and Disney seem likely winners. No others are clearly there. NBCU, Warner/HBO, and maybe CBS/Viacom may be ok but still need more scale. Gets harder as you go down with scale and reach. Consolidation and rationalization are coming to this Wild West space. Two strategies: dominate a niche or tremendous global scale to be a general interest player. (Nathanson's point about 3 giants and several niche players with a ditch of dead in between). Niches - maybe 2-3 areas. Discovery, AMC etc. will need to choose a path: go niche or merge into something larger.

A strategy that thinks the industry will look a lot like it does now in five years, is a losing one.

Very unclear in equity markets where to place bets - who matches up with who?

5G Consumer Insights

Wendy Rosen, Cox Consumer Insights
CTAM 8.19.20



Study Overview

Purpose

1. Size and define the 5G target market by understanding those consumers most likely to switch to 5G solutions (mobile substitution and/or fixed wireless)
2. Inform ideation efforts and overall 5G defense strategy

Methodology

Online survey among 1,949 internet subscribers in the Cox footprint (includes home internet and mobile-only subscribers)

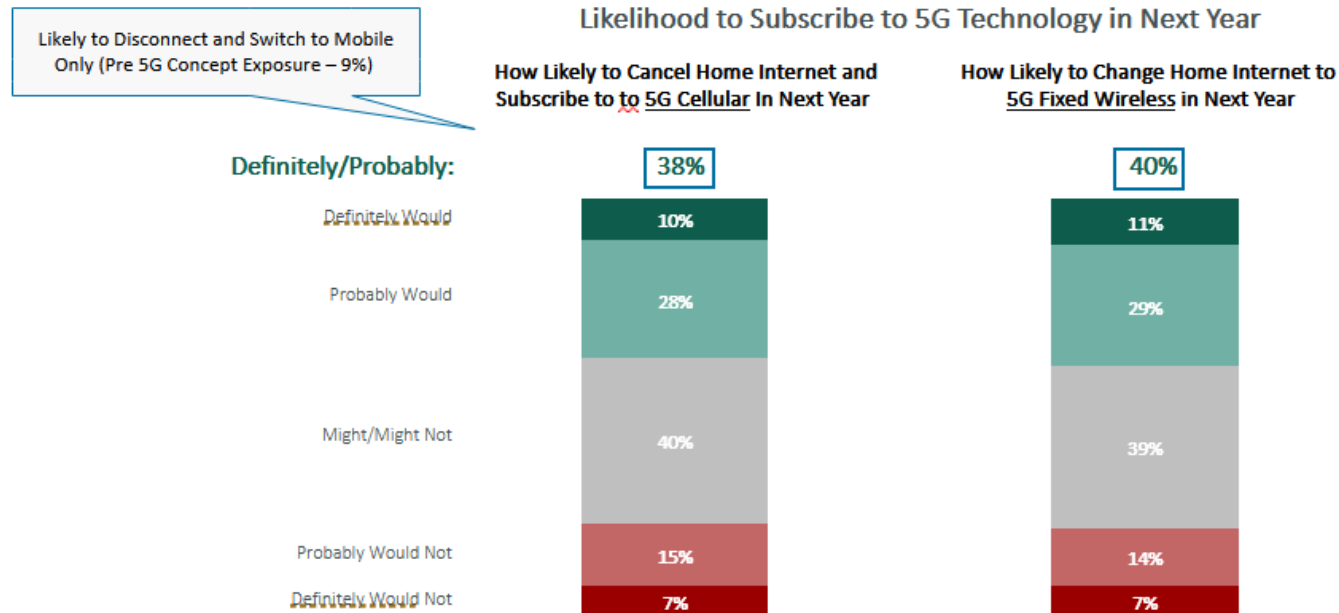
Respondents were exposed to short written descriptions of 5G solutions – Cellular and Fixed Wireless (unbranded, unpriced)

5G Threat

3

High level of overlap among consumers interested in both 5G Cellular and 5G Fixed Wireless.

Subsequent research models actual “5G take rate” at about 14% assuming full awareness and access to offerings from multiple providers – driven by 5G Fixed Wireless



Based on 5G Concept Exposure

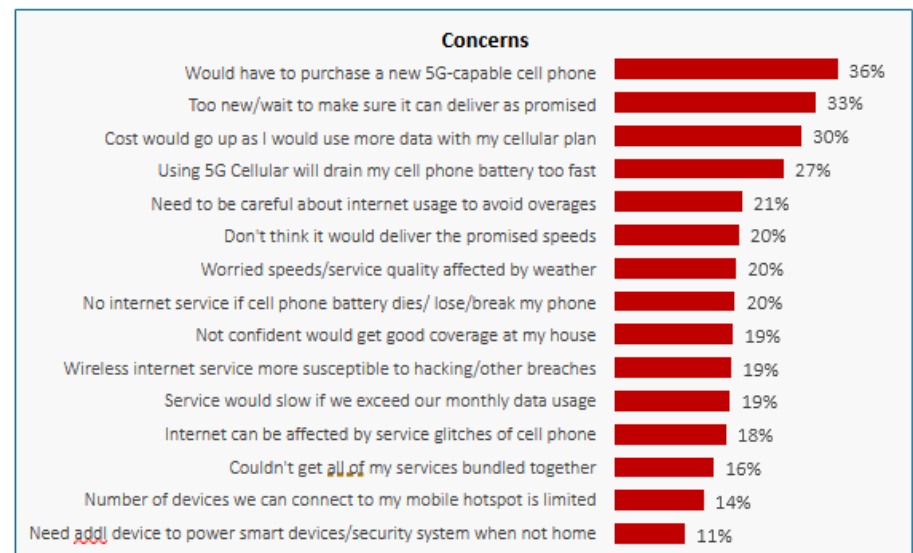
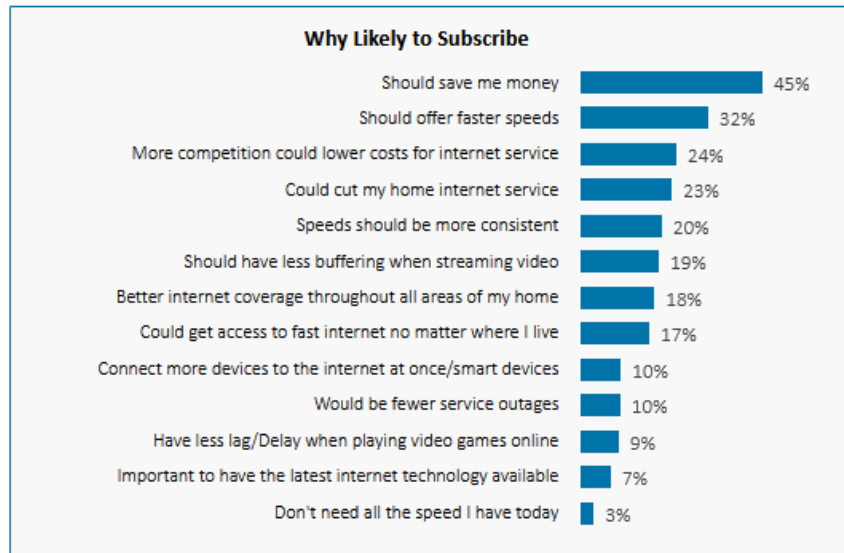
Cox Proprietary and Confidential

4



Consumers find benefit in assumed cost savings and faster speeds, but express concerns with having to purchase a new 5G capable phone, trying unproven technology and exceeding data plan limits.

5G Cellular

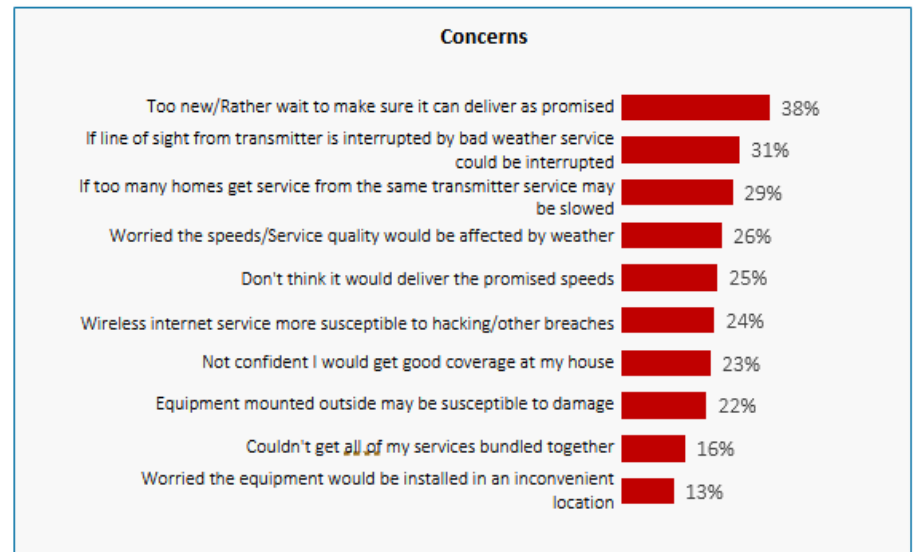
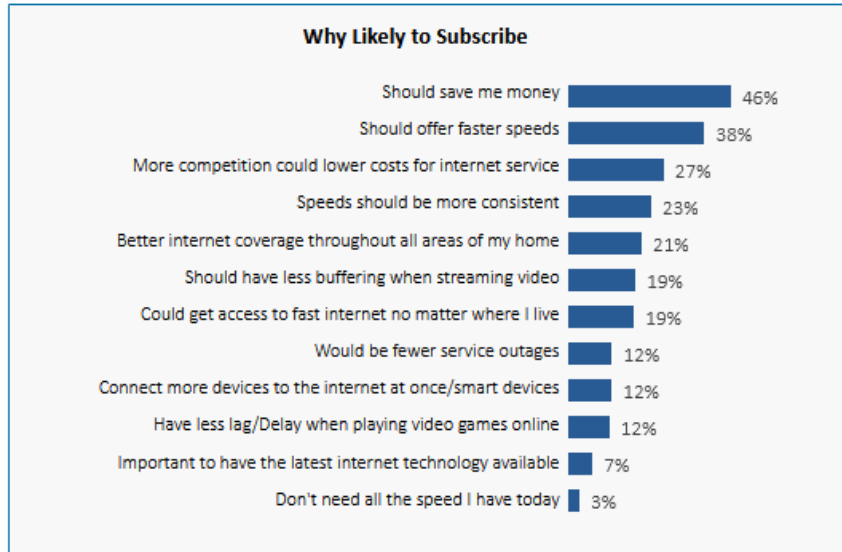


"The idea of having high speeds to this extent anywhere and away from home is very enticing. It's also an interesting thought that it could replace traditional home internet."
 – 25-34, male

"15GBs for noncellular devices isn't enough for my needs, since I'm on my laptop throughout the day and use it for both personal and business tasks." – 55-64, female
"Can't use a hotspot to connect to my 10 devices and still get a fast connection."
 – 55-64, male

Consumers find similar benefits with 5G Fixed Wireless; In addition to unproven technology, 5G FW causes some concern about line of sight & number of homes in service from single transmitter.

5G Fixed Wireless










"It's the fastest internet available and would make streaming easier." – 65-74, female
"Being wireless is a wonderful bonus because I hate clutter." – 25-34, male
"It's new and would love to use the latest technology, innovative and reliable access." – 35-44, female

"Dependability is an issue since it's still new technology." – 45-54, male
 In other research, we picked up on health concerns: *"There's still much debate over the safety of 5G, I don't like that my neighbors can put a transmitter near my home possibly affecting the health of my family." – 35-44, female*

5G Consumer Target

7

We found seven themes in the data that can inform 5G defense. Each theme is supported by a target consumer profile

Themes		Preliminary Customer Profiles (not mutually exclusive segments)	
1	<p>Unencumbered</p> <p>On-the-go, untethered lifestyle makes cellular plans the default source for connectivity</p>	 <p>Urban Millennials</p>	<p>Younger, single and still establishing their career. Still fairly transient with many having moved/changed jobs recently.</p>
2	<p>Month to Month</p> <p>Real financial constraints underpin a desire to shave monthly living expenses wherever possible</p>	 <p>Strugglers</p>	<p>Struggling financially as many are lower income, with some govt or other financial assistance and tend to live 'month to month'.</p>
3	<p>No Frills Tech</p> <p>Slower tech adoption and more basic home internet needs justify internet that's 'good enough'</p>	 <p>Tech Laggards</p>	<p>Late to adopt technology, mobile only likely meets their needs because they do little streaming and have fewer connected devices.</p>
4	<p>Wireless Workarounds</p> <p>Unlimited data plans give peace of mind to use cellular data wherever, whenever without added expense</p>	 <p>Making It Work*</p>	<p>Making it work with mobile data only. Have unlimited data plans, frequently rely on public hotspots and use their phone as a hotspot. Willing to switch to have the best/fastest wireless.</p>
5	<p>Performance Above All</p> <p>Heavy online usage and interest in new technology requires having fast, <u>ultra reliable</u> home internet</p>	 <p>Tech Adopters*</p>	<p>Early tech adopters, heavier internet users- connect more devices, stream more.</p>
6	<p>Feeling Stuck</p> <p>Frustrations with current providers and perceived lack of choice drive openness to new alternatives</p>	 <p>Eager For Options</p>	<p>Not satisfied with current internet service and looking for options. Feel stuck/trapped due to a lack of options.</p>
7	<p>Stay in Control</p> <p>Heavy online usage with many simultaneous users drives concerns about exceeding data limits</p>	 <p>Household Managers*</p>	<p>Employed, often with children in the home, managing household data usage. Heavier internet users with significant hours online.</p>

Cox Proprietary and Confidential

* Subsequent research found these groups to show greatest risk of loss to 5G



Defending Against 5G

- **Focus on Low Cost/Flexibility.** Consumers will be enticed by the 5G Cellular promise of cost savings and attractiveness of having an effective single source alternative. We can defend through:
 - Alternative business models (basic/no frills solutions) to save customers money
 - Flexible pricing models
 - Flexible relationships
- **Redefine The Enemy.** Consumers will be enticed by claims of a potentially lower cost, effective alternative with speed/reliability just as good or better from trusted providers. How can we leverage consumer concerns to instill doubt?
 - Single source dependency (battery, weather, lost phone, line of sight)
 - Unproven/Performance that under-delivers (e.g. speed/buffering/latency/coverage/security)
 - Tethering challenges/simultaneous devices
 - Single source not necessarily cheaper (5G phones/overage fees)
 - Insufficient for 'smart home'
- **Make it Easier (and more compelling) to Do Business With Us.** How can we make our customer relationships stickier in the face of new competitive threats?
 - Flexible Pricing Models
 - Frictionless Customer Service
 - Reward Loyalty

Appendix

10

Respondents were exposed to two 5G concepts for reaction

5G Cellular

With ultra-fast speeds, ultra-low latency and massive capacity, it's time to go 5G Cellular.

5G is here, and it's going to change everything. From the way you communicate to the way you game. And it all starts with 5G Cellular speeds of at least 10x faster than your current 4G/LTE speeds.

It's the first ever cellular service with fast enough speeds to stream 4K movies with virtually no buffering and download in seconds what used to take minutes.

With nearly zero lag, 5G-powered devices will provide enhanced gaming experiences and unlock new, innovative possibilities. Don't wait to sign up now!

*5G Cellular Plan with data required

5G Fixed Wireless

Introducing 5G Fixed Wireless Internet

Enjoy a better online experience with faster surfing, streaming, and downloading.

Whether you live in a city, a suburb or out in the country, with 5G Fixed Wireless Internet you can get fast Internet speeds of at least 300 Mbps (up to 1 Gbps), so you can download, surf, and stream with confidence.

Together, we will find the best place on your home to install a small wireless Internet receiver with uninterrupted "line of sight" access to a nearby 5G transmitter.

Installation is quick and easy. We'll set up your receiver to communicate with the nearest 5G transmitter to ensure the strongest, most reliable signal.

Our expert will help you connect the devices in your home with WiFi, and that's it, you're ready to go!

Note: concepts are unbranded and unpriced

Cox Proprietary and Confidential

11 Now, we'd like you to read a brief description about a possible new kind of internet service and answer a few questions about it..



5G Messaging Framework

September 2020



Goal

Create a messaging framework for cable/broadband to help deposition 5G wireless as a good choice for in-home Internet connection, but without directly attacking or mentioning 5G.

5G Messaging Framework



5G is **GREAT** for mobile/on-the-go

but

NOT THE BEST SOLUTION for in-home experience

5G Assessment

First, we looked at the overall issues/concerns with 5G to help formalize what we would need to be messaging against:

Infrastructure/Safety

Security

Expense

Time

5G Messaging Framework



Infrastructure/Safety

Security

Expense

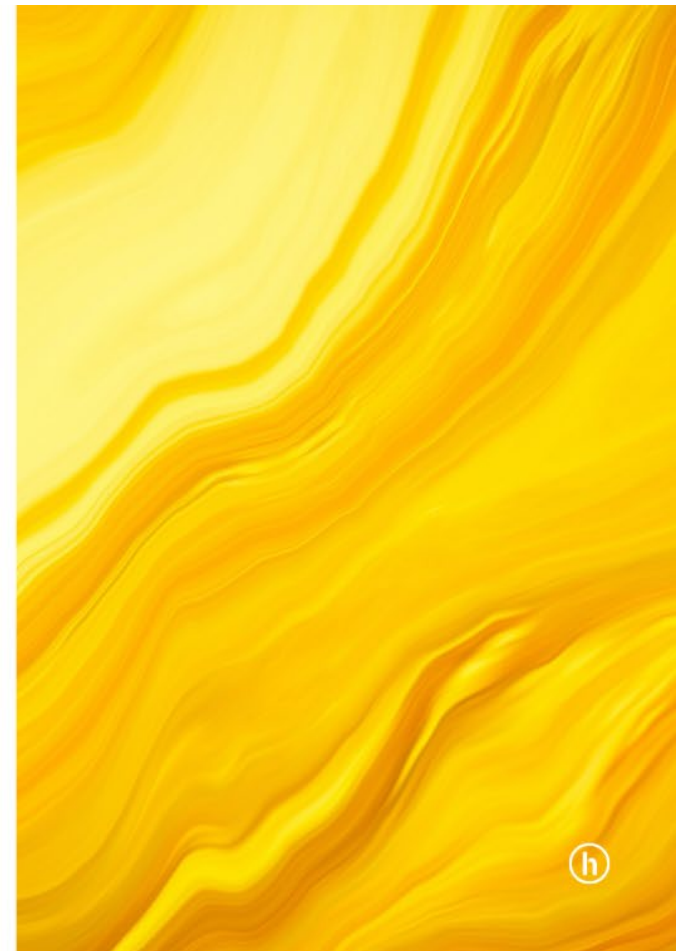
Time

5G is less reliable for longer distances, so needs more millimeter-wave frequencies to be reliable

Many health concerns (and even some conspiracies) around this

Also doesn't travel well through buildings/walls/windows, so will require many more antennas/base stations

5G Messaging Framework



Infrastructure/Safety

Security

Expense

Time

Faster data speeds means increased connectivity

Cloud-based and data virtualization services need to be as airtight as possible to protect user data and privacy

Users will also have to be more careful and vigilant as stewards of their data

5G Messaging Framework



Infrastructure/Safety
Security
Expense
Time

Building a network is expensive, and carriers will raise the money to do it by increasing customer revenue

Customers will also need to purchase pricey 5G-compatible devices for connection

5G Messaging Framework



Infrastructure/Safety
Security
Expense
Time

With infrastructure not yet in place in many areas, we're still a ways out from the technology being widespread

Likely be smaller providers offering 5G at some point, so a lot of decision-making for the customer

5G Messaging Framework



Questions / Concerns

Customers will have multiple providers for services in their homes
(aka multiple accounts/bills to manage)

As more customers join 5G networks, will they bottleneck?

5G isn't robust enough to handle the growing number of smart homes/appliances

Those who use only mobile 5G in-home, how will they handle data caps?

Those who use only mobile 5G in-home, 5G phones *(for now)* have low battery life

5G Messaging Framework

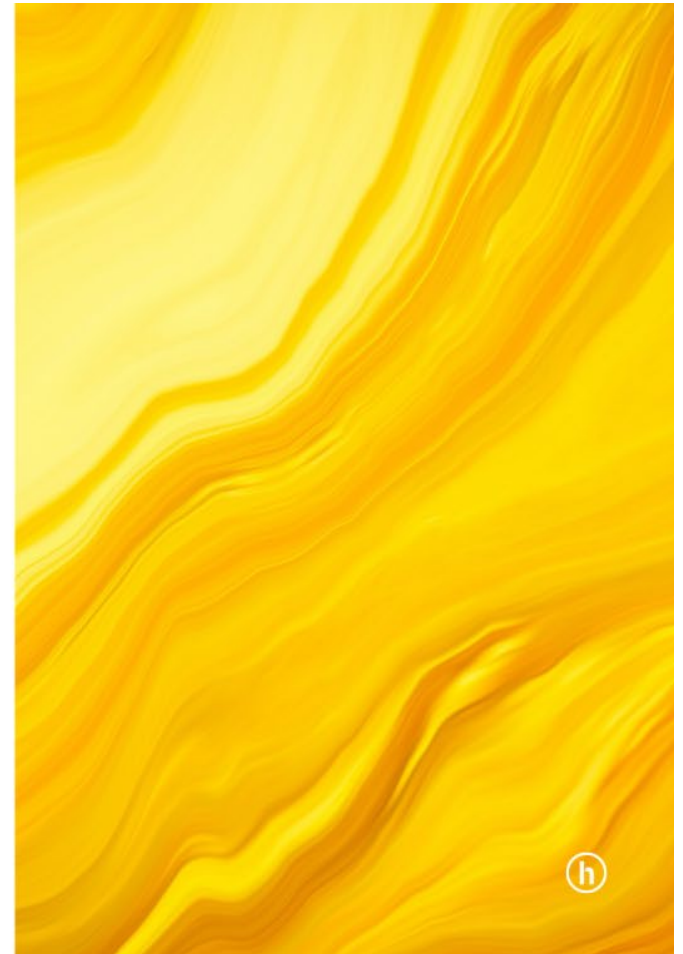


Why Broadband-Based Wifi is best

After assessing the 5G issues/concerns, we were then able to start mapping out how broadband could use counter-messaging to indirectly de-position 5G:

- Reliable**
- Accessible**
- Simple**
- Secure**
- Safe/Trusted**

5G Messaging Framework



- Reliable**
- Accessible
- Simple
- Secure
- Safe/Trusted

The most important factor for both work and entertainment purposes, a reliable broadband connection allows you to get the right Internet speed for your home to support multiple family members on multiple devices at one time. (Yep, no data caps or battery fatigue.) With more of us working and learning from home, we need the most dependable connection possible.

5G Messaging Framework



Reliable
Accessible
Simple
Secure
Safe/Trusted

Access to high-speed broadband technology is already widespread across the U.S. and likely already in homes, while newer forms of Internet connectivity will require years to implement throughout various regions—not to mention the purchase of pricey, compatible devices.

5G Messaging Framework



Reliable
Accessible
Simple
Secure
Safe/Trusted

With a broadband connection, everything you need is in one place. All your entertainment is easily navigable from one central hub, your cable and Internet charges are combined into one bill, and all your customer service needs are streamlined.

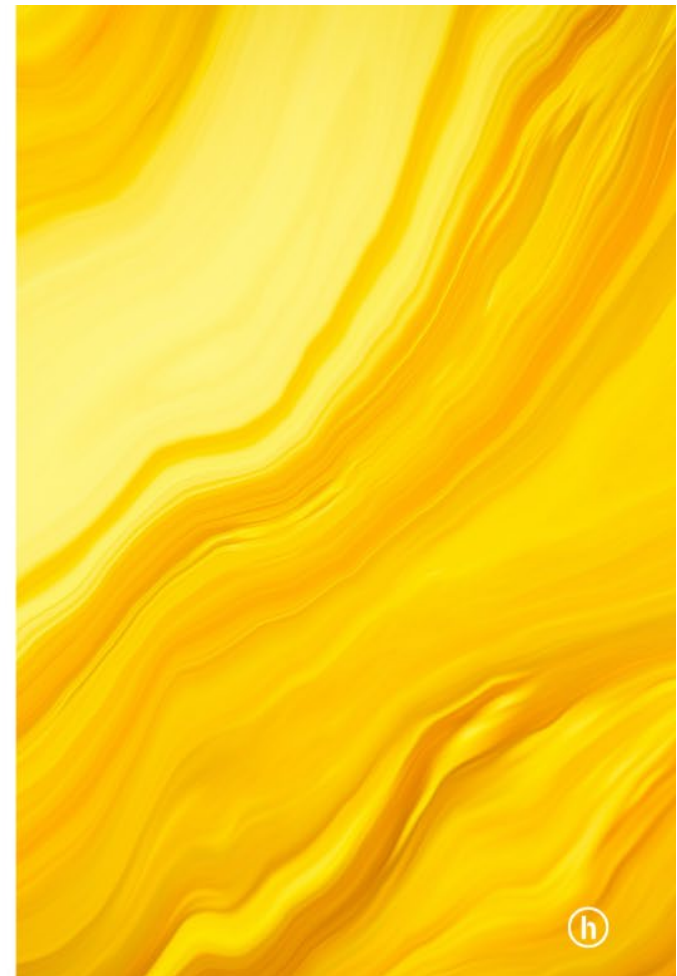
5G Messaging Framework



- Reliable
- Accessible
- Simple
- Secure**
- Safe/Trusted

Because we are constantly improving upon existing technology, there are many suitable security solutions when it comes to protecting the broadband-based connection in homes. More recent WiFi router models already use Wi-Fi Protected Access 2, which provides stronger network and data protection to keep your personal information safe.

5G Messaging Framework



- Reliable
- Accessible
- Simple
- Secure
- Safe/Trusted**

Broadband connectivity is highly regulated, making it a safe and harmless technology to use within your home. Broadband and broadband-based WiFi are already widely known as trusted forms of Internet access.

5G Messaging Framework



Target Groups

Who is most likely to consider switching to 5G? These are the personas most likely to consider their Internet (and TV) services:

The Mover

Moving is most common time to think about your services

Many times you may need to switch providers based on coverage anyway

It's natural to weigh your options in a new environment

The Life-Changer

Marriage / having kids / empty-nesters

A change in the number of people on Internet-connected devices in the home

Assessing different entertainment options/needs

The Remote Worker / Learner

Internet reliability and bandwidth in our homes has never been more important

Many more of us work, learn (and teach!), and spend more time at home

This has us thinking more about our Internet needs

The Late Adaptor

Many who may not have been as tech-savvy previously have now become more digitally inclined

We've learned how to stay in touch with loved ones, find new ways to entertain ourselves at home, and complete daily tasks (shopping, telemedicine, etc.) online

Might be thinking about expanding Internet service capabilities

5G Messaging Framework



Discussion



Thank You

Start a capture

5G MESSAGING Framework & Execution

December 2020

hatch
130

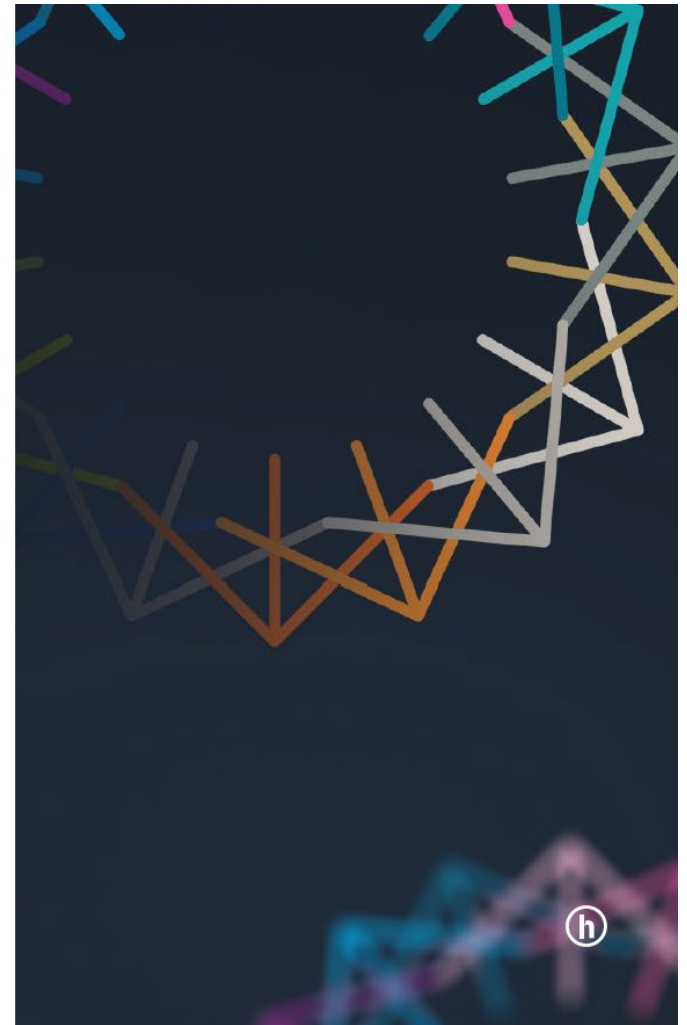


Start a capture

Goal

Create a messaging framework for cable/broadband to help deposition 5G wireless as a good choice for in-home Internet connection, but without directly attacking or mentioning 5G. From there, create a strategy to effectively market broadband home Internet.

5G Messaging Framework & Execution



Start a capture

5G is **GREAT** for mobile/on-the-go

but

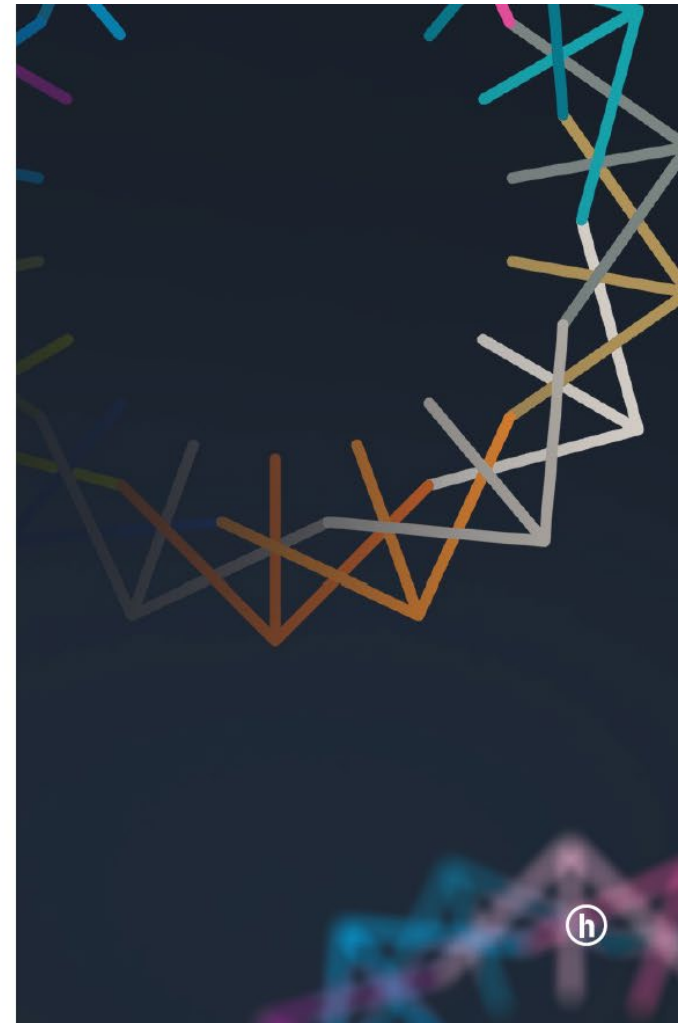
NOT THE BEST SOLUTION for in-home experience

5G Assessment

First, we looked at the overall issues/concerns with 5G to help formalize what we would need to be messaging against:

Infrastructure/Safety
Security
Expense
Time

5G Messaging Framework & Execution



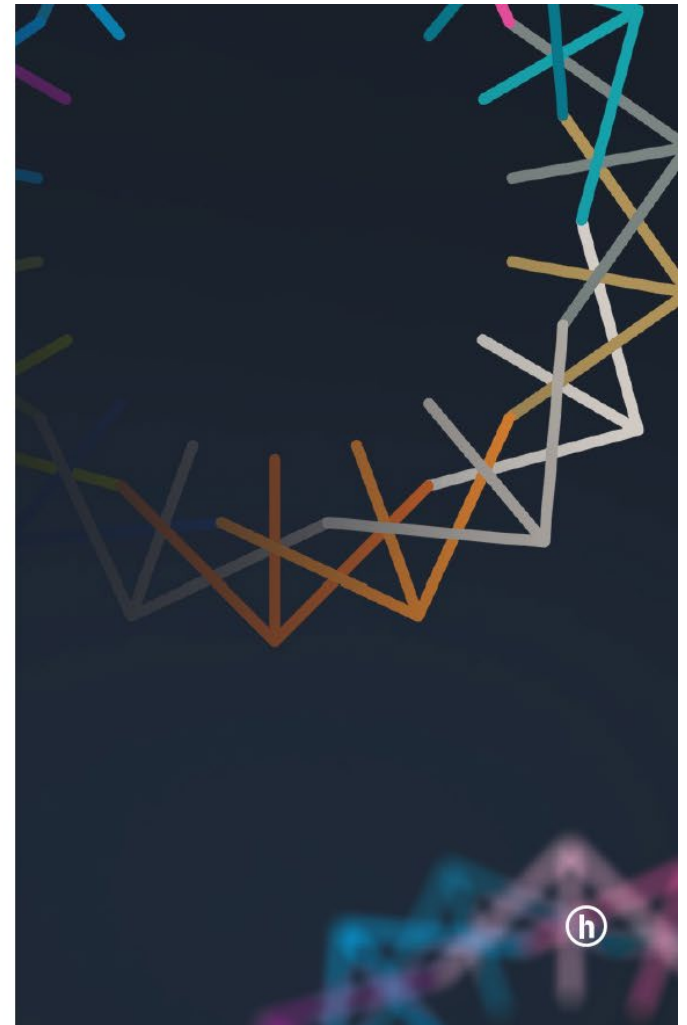
Start a capture

Why Broadband-Based WiFi is best

After assessing the 5G issues/concerns, we were then able to identify the aspects of broadband that are most appealing to consumers (and superior to 5G):

- Reliable
- Accessible
- Simple
- Secure
- Safe/Trusted

5G Messaging Framework & Execution



Start a capture

Audiences

AUDIENCES

UNENCUMBERED

Urban Millennials

MONTH-TO-MONTH

Strugglers

NO FRILLS TECH

Tech Laggards

WIRELESS WORKAROUNDS

Making it Work

PERFORMANCE ABOVE ALL

Tech Adopters

FEELING STUCK

Eager for Options

STAY IN CONTROL

Household Managers

The Mover

The Life Changer

The Remote Worker/Learner

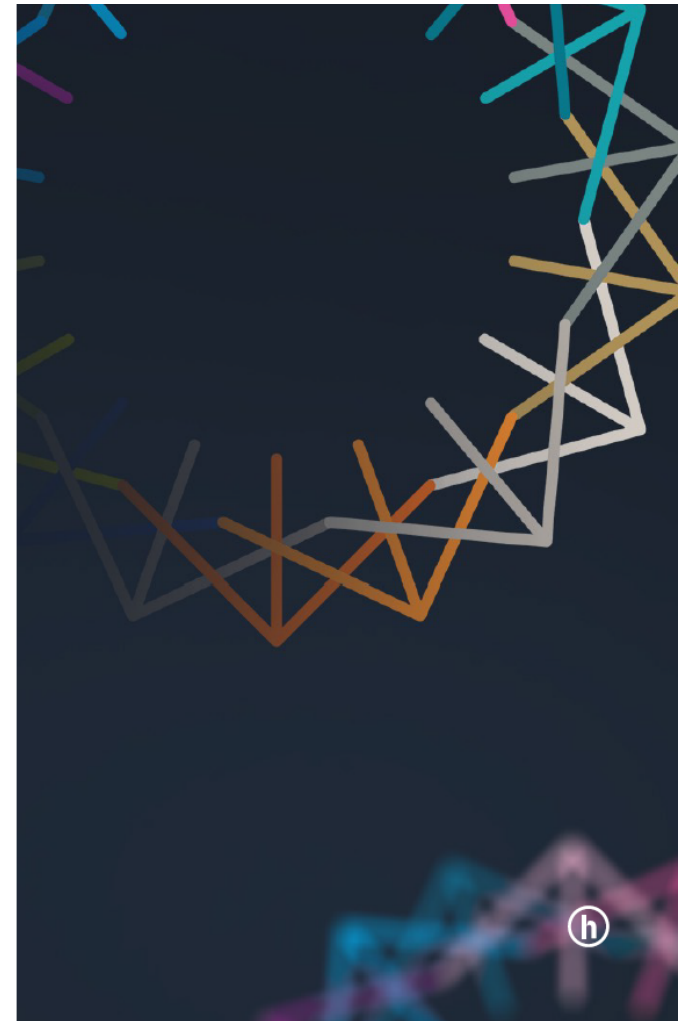
The Late Adopter

5G Messaging Framework & Execution

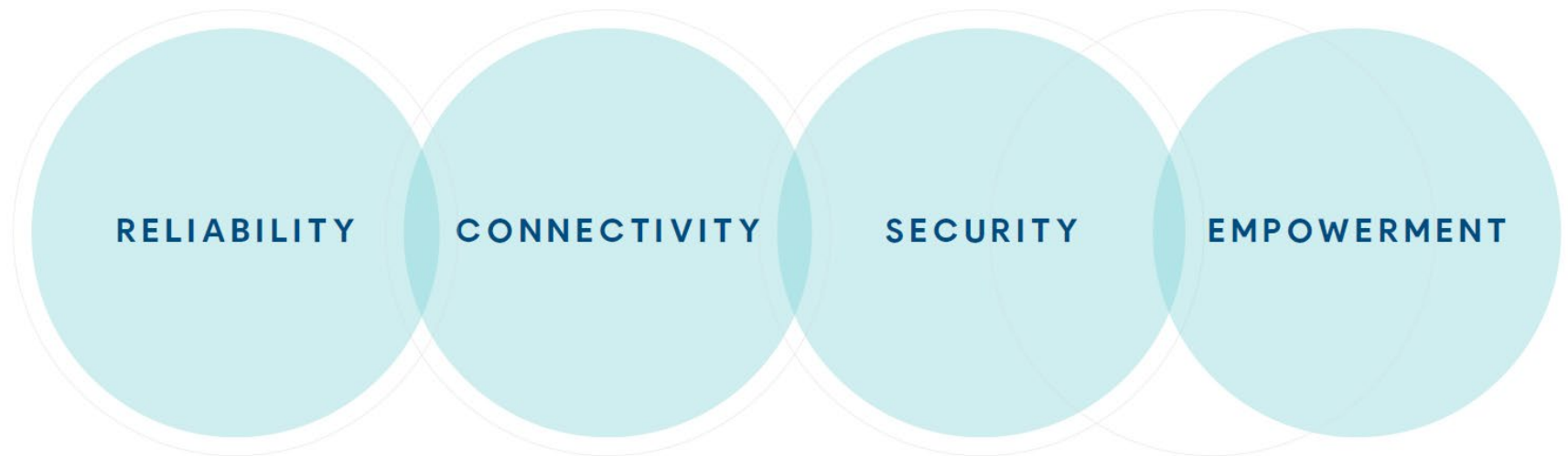
The Mover

- Moving is a moment of truth—it forces you to evaluate your services.
- Many times you may need to switch providers based on your location anyway, so you may be more open to other connectivity options.
- With remote work more common recently, many movers are looking for a suitable WFH environment.

5G Messaging Framework & Execution



Messaging Touchpoints



5G Messaging Framework & Execution

Start a capture

With our initial target audience—The Mover—in mind, we identified four messaging pillars from which to build our marketing strategy.

RELIABILITY

As mentioned previously, home owners are looking for the most reliable Internet connection that will cause no—or as little as possible—disruptions to daily life. This is especially important as we work more, learn more, and spend more time at home.

CONNECTIVITY

There's a comfort associated with connectivity—now more than ever. Whether staying in touch virtually with family members, friends, and coworkers, or just enjoying entertainment, we crave connectivity.

SECURITY

As our digital lives have expanded, so have our worries around secure connections. Home owners want to feel confident in their Internet connectivity and not worry about their personal information being compromised.

EMPOWERMENT

We want to remind home owners that they have the power to choose the right Internet provider for their personal needs. This places the control back into the consumer's hands and allows them to make an educated decision for their household, regardless of the newest trend.

5G Messaging Framework & Execution



Execution



Reliability

POTENTIAL AD COMPONENTS

Reliability

The following are individual sets of text, headlines, link descriptions, and images that will be A/B tested in various combinations through Facebook. We will let the market decide which pieces resonate most effectively, and Facebook's algorithm will automatically adjust to serve the most impactful combinations of creative.

5G Messaging Framework & Execution

AD CREATIVE

Reliability

TEXT:

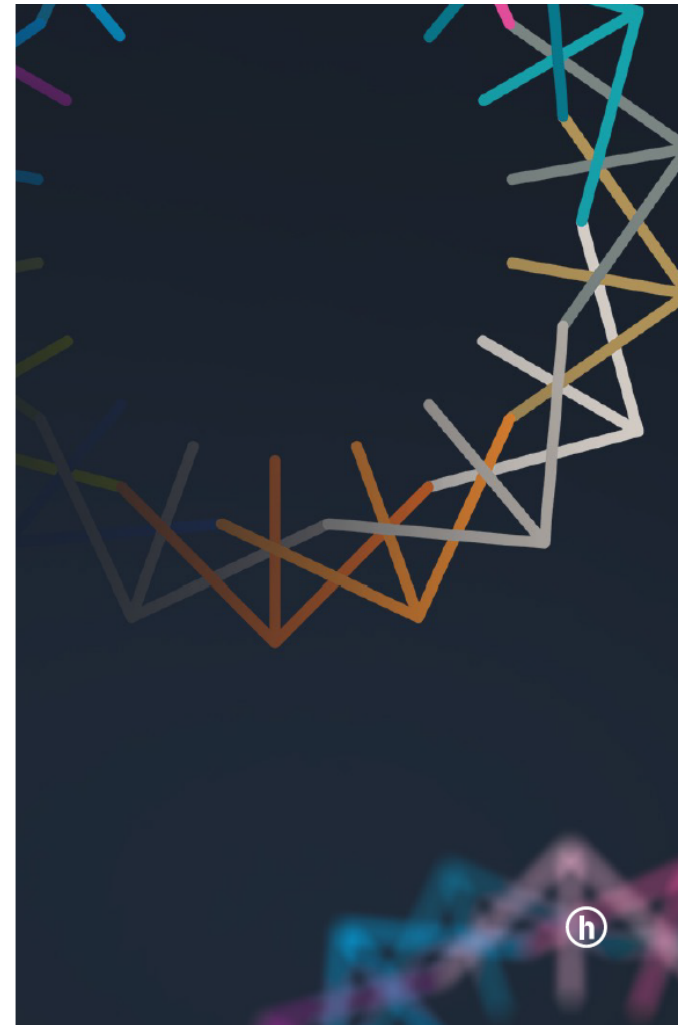
Working from home? Sounds like you need a fast Internet connection that's also reliable.

Get the high-speed, reliable Internet you need to power all your home's devices.

New home? Get up and running in no time with a reliable Internet connection.

Don't wait until there are connectivity issues to get reliable Internet for your new home.

5G Messaging Framework & Execution



AD CREATIVE

Reliability

HEADLINES:

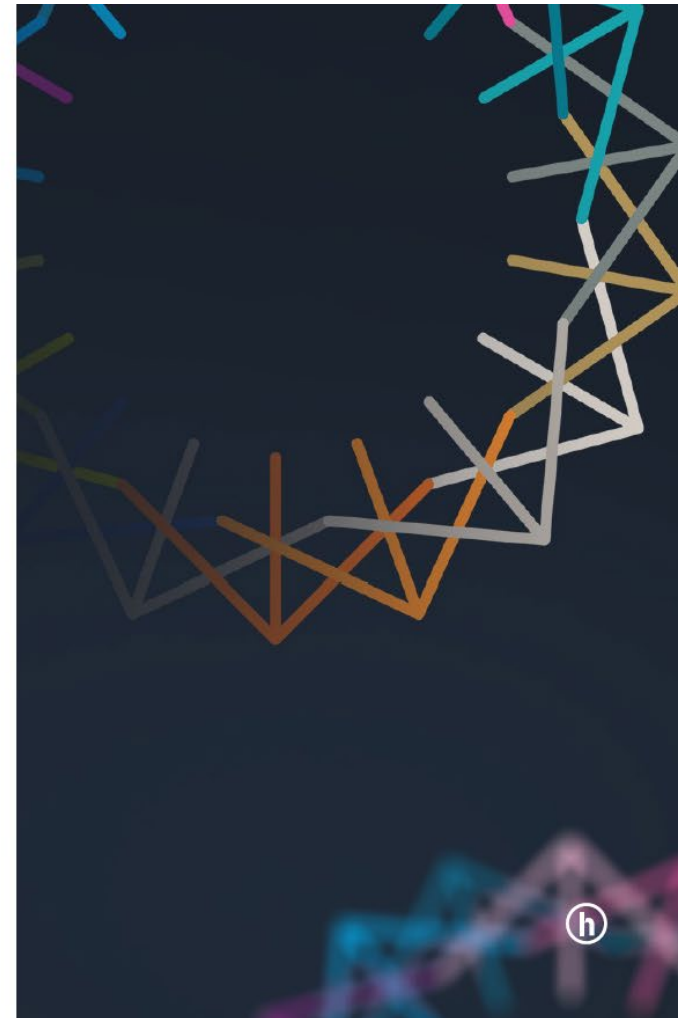
Reliable home Internet.

Reliable Internet for your home.

Count on reliable Internet.

Reliable Internet for the whole family.

5G Messaging Framework & Execution



AD CREATIVE

Reliability

LINK DESCRIPTIONS:

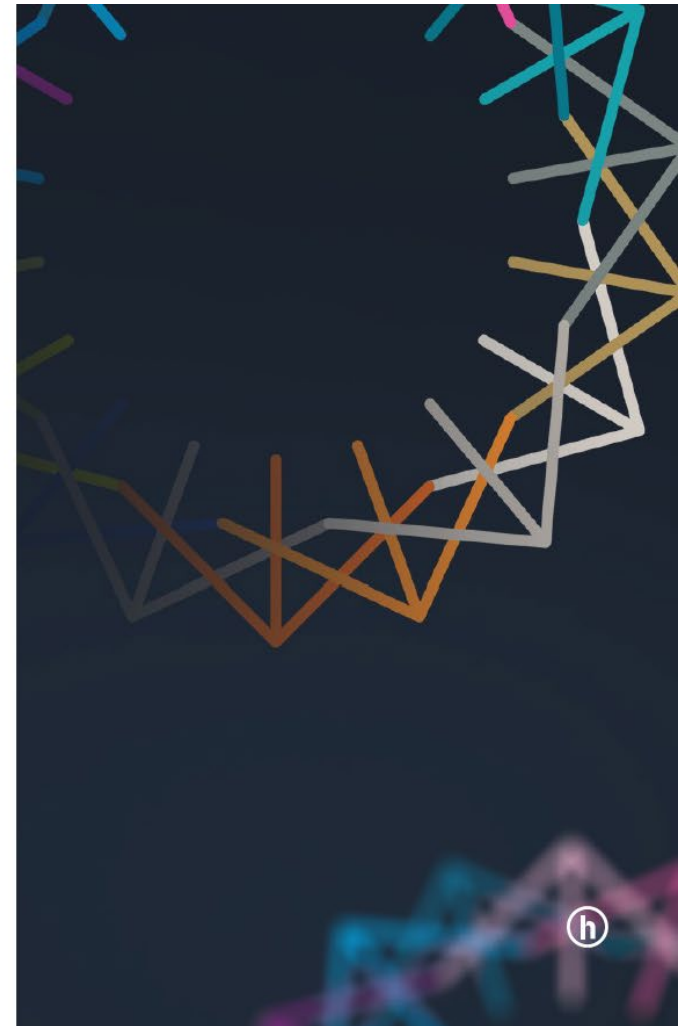
Explore Internet Options

Find Internet Providers

Find Your New Provider

Connect Your New Home

5G Messaging Framework & Execution



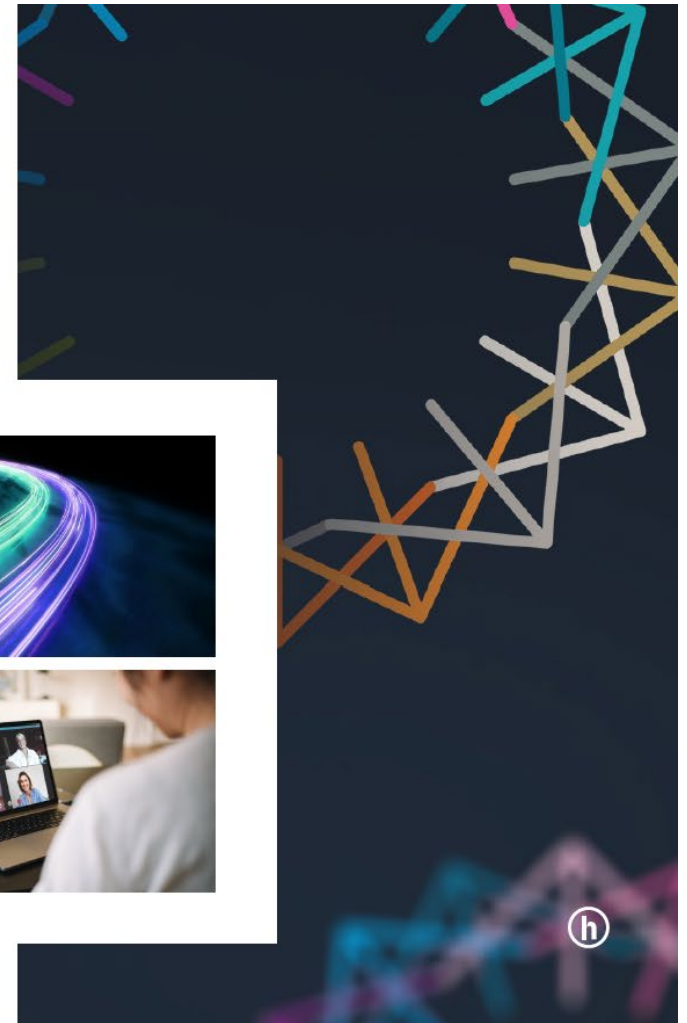
AD CREATIVE

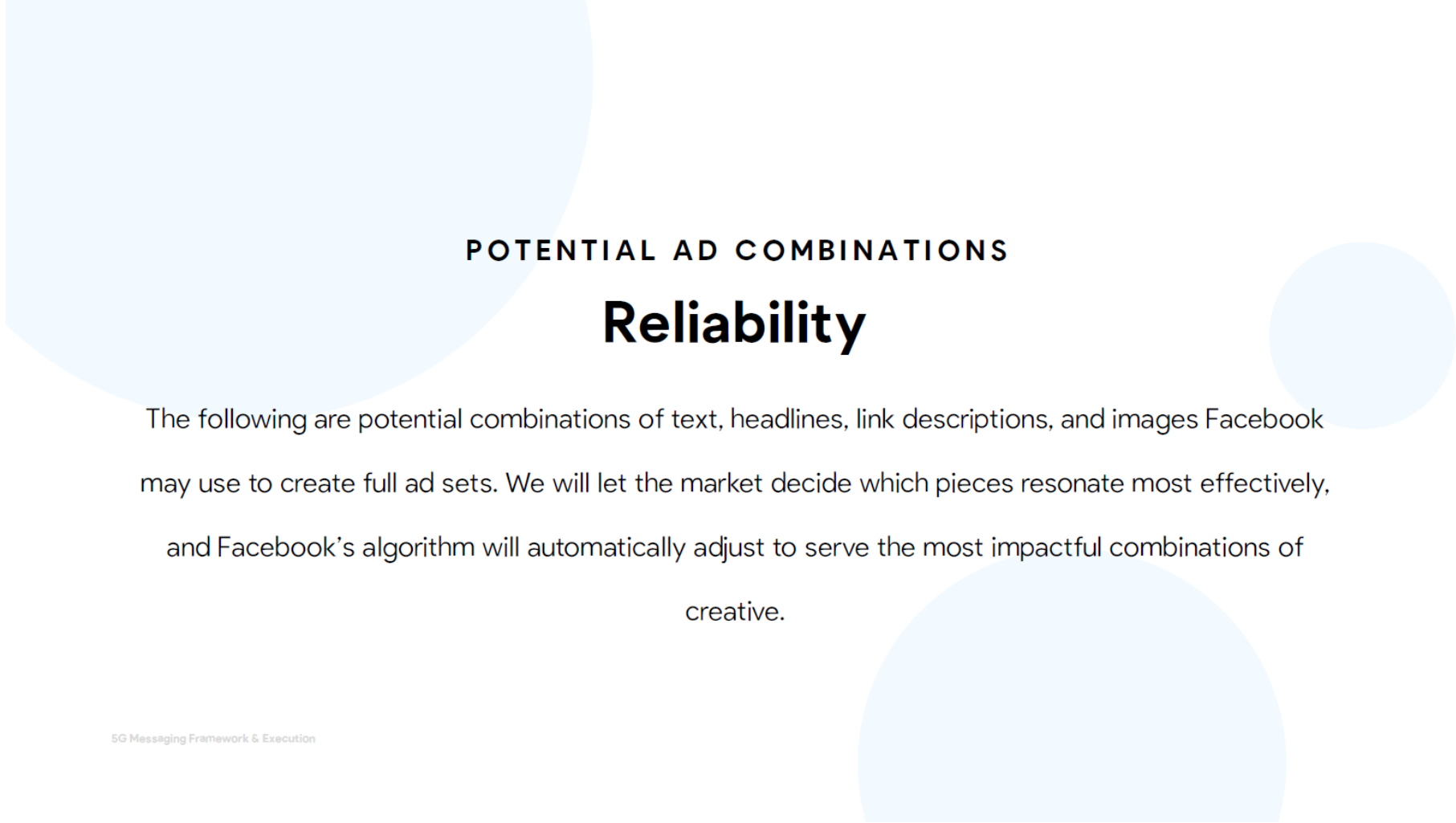
Reliability

IMAGES:



5G Messaging Framework & Execution





POTENTIAL AD COMBINATIONS

Reliability

The following are potential combinations of text, headlines, link descriptions, and images Facebook may use to create full ad sets. We will let the market decide which pieces resonate most effectively, and Facebook's algorithm will automatically adjust to serve the most impactful combinations of creative.

5G Messaging Framework & Execution

Start a capture

RELIABILITY

Potential Facebook Ads

A/B Testing text, image, headline, and link description

TEXT →

SmartMove
October 6 at 7:32 PM · 🌐

Working from home? Sounds like you need a fast Internet connection that's also reliable.

SMARTMOVE.US/INTERNET
Reliable home Internet. [Learn More](#)
Explore Internet Options

👍👎 8 4 Shares

👍 Like 💬 Comment ➦ Share

Write a comment...

1

HEADLINE →
LINK DESCRIPTION →

SmartMove
October 6 at 7:32 PM · 🌐

Get the high-speed, reliable Internet you need to power all your home's devices.

SMARTMOVE.US/INTERNET
Reliable Internet for your home. [Learn More](#)
Find Internet Providers

👍👎 8 4 Shares

👍 Like 💬 Comment ➦ Share

Write a comment...


2

5G Messaging Framework & Execution


RELIABILITY

Potential Facebook Ads

A/B Testing text, image, headline, and link description

 **SmartMove**
October 6 at 7:32 PM · 🌐

New home? Get up and running in no time with a reliable Internet connection.



SMARTMOVE.US/INTERNET
Count on reliable Internet. [Learn More](#)
Find Your New Provider

👍👍👍 8 4 Shares

👍 Like 💬 Comment ➦ Share 🌐

🌐 Write a comment... 🗨️ 📷 📄 📌

3

 **SmartMove**
October 6 at 7:32 PM · 🌐

Don't wait until there are connectivity issues to get reliable Internet for your new home.



SMARTMOVE.US/INTERNET
Reliable Internet for the whole family. [Learn More](#)
Connect Your New Home

👍👍👍 8 4 Shares

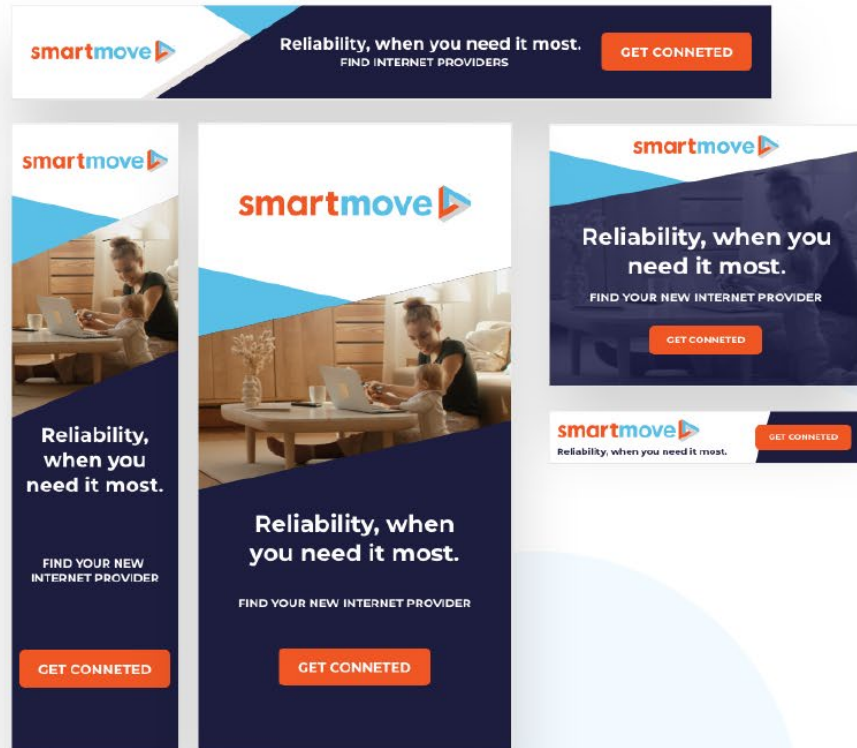
👍 Like 💬 Comment ➦ Share 🌐

🌐 Write a comment... 🗨️ 📷 📄 📌

4

5G Messaging Framework & Execution

RELIABILITY
Display Ads



5G Messaging Framework & Execution



Connectivity

POTENTIAL AD COMPONENTS

Connectivity

The following are individual sets of text, headlines, link descriptions, and images that will be A/B tested in various combinations through Facebook. We will let the market decide which pieces resonate most effectively, and Facebook's algorithm will automatically adjust to serve the most impactful combinations of creative.

5G Messaging Framework & Execution

AD CREATIVE

Connectivity

TEXT:

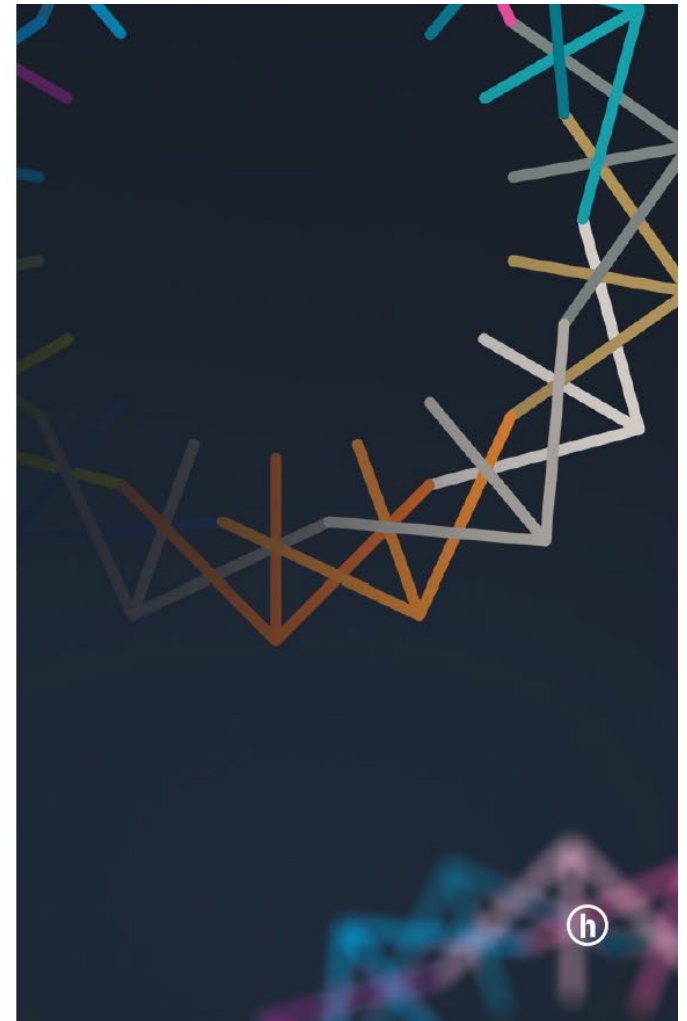
Moving to a new home? Get connected with ease.

Feel the comfort of a reliable Internet connection in your new home.

Get a reliable connection to the outside world from inside your new home.

Get an Internet connection that works as hard as you do.

5G Messaging Framework & Execution



AD CREATIVE

Connectivity

HEADLINES:

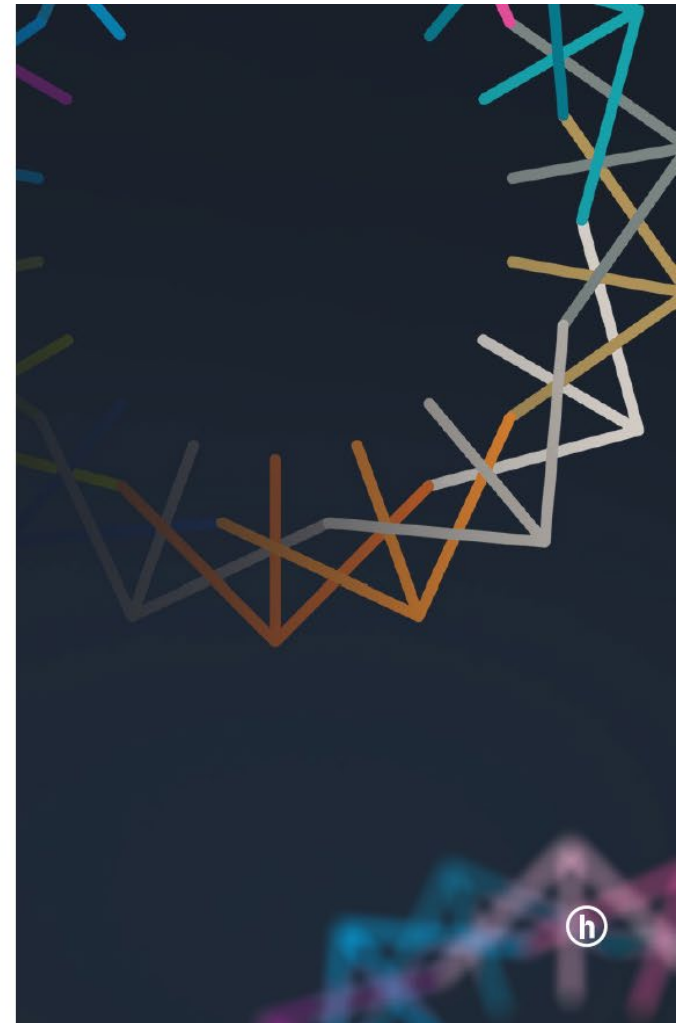
Connect from home.

Connect to your new world.

Get a dependable Internet connection.

Connect your new home.

5G Messaging Framework & Execution



AD CREATIVE

Connectivity

LINK DESCRIPTION:

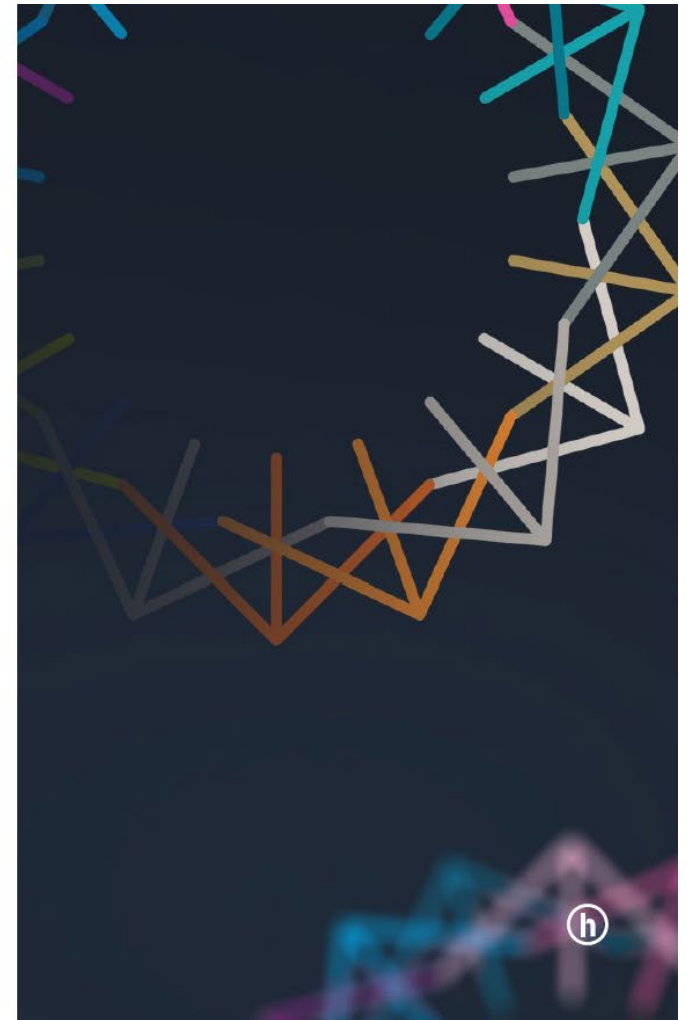
Explore Internet Options

Find Internet Providers

Find Your New Provider

Connect Your New Home

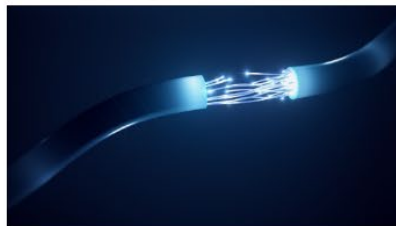
5G Messaging Framework & Execution



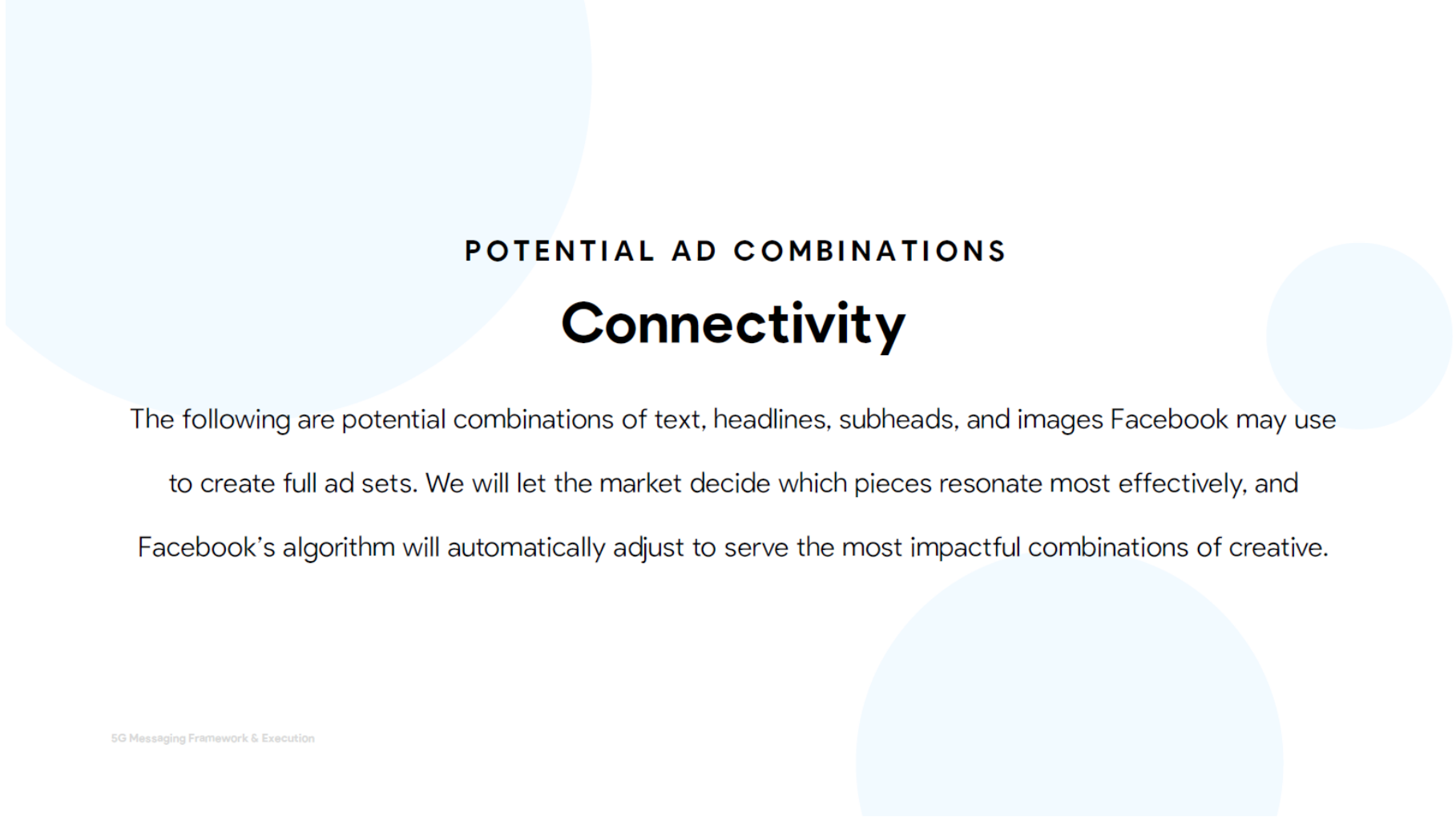
AD CREATIVE

Connectivity

IMAGES:



5G Messaging Framework & Execution



POTENTIAL AD COMBINATIONS

Connectivity


The following are potential combinations of text, headlines, subheads, and images Facebook may use to create full ad sets. We will let the market decide which pieces resonate most effectively, and Facebook's algorithm will automatically adjust to serve the most impactful combinations of creative.

5G Messaging Framework & Execution

CONNECTIVITY Potential Facebook Ads

A/B Testing text, image, headline, and link description

TEXT → Moving to a new home? Get connected with ease.



SmartMove
October 6 at 7:32 PM · 🌐

SMARTMOVE.US/INTERNET
Connect from home. [Learn More](#)
Explore Internet Options

👍👎 8 4 Shares


👍 Like 💬 Comment ➦ Share 🌐

Write a comment... 🗨️ 📷 📧 🗑️

1

HEADLINE → **Connect from home.**

LINK DESCRIPTION → Explore Internet Options



SmartMove
October 6 at 7:32 PM · 🌐

Feel the comfort of a reliable Internet connection in your new home.

SMARTMOVE.US/INTERNET
Connect to your new world. [Learn More](#)
Find Internet Providers

👍👎 8 4 Shares

👍 Like 💬 Comment ➦ Share 🌐


Write a comment... 🗨️ 📷 📧 🗑️

2


CONNECTIVITY

Potential Facebook Ads

A/B Testing text, image, headline, and link description

 **SmartMove**
October 6 at 7:32 PM · 🌐

Get a reliable connection to the outside world from inside your new home.




SMARTMOVE.US/INTERNET
Get a dependable Internet connection. [Learn More](#)
Find Your New Provider

👍👎 8 4 Shares

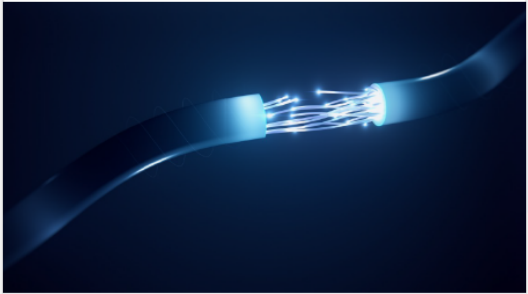
👍 Like 💬 Comment ➦ Share 🌐

📷 Write a comment... 📷 📷 📷

3

 **SmartMove**
October 6 at 7:32 PM · 🌐

Get an Internet connection that works as hard as you do.



SMARTMOVE.US/INTERNET
Connect your new home. [Learn More](#)
Connect Your New Home

👍👎 8 4 Shares

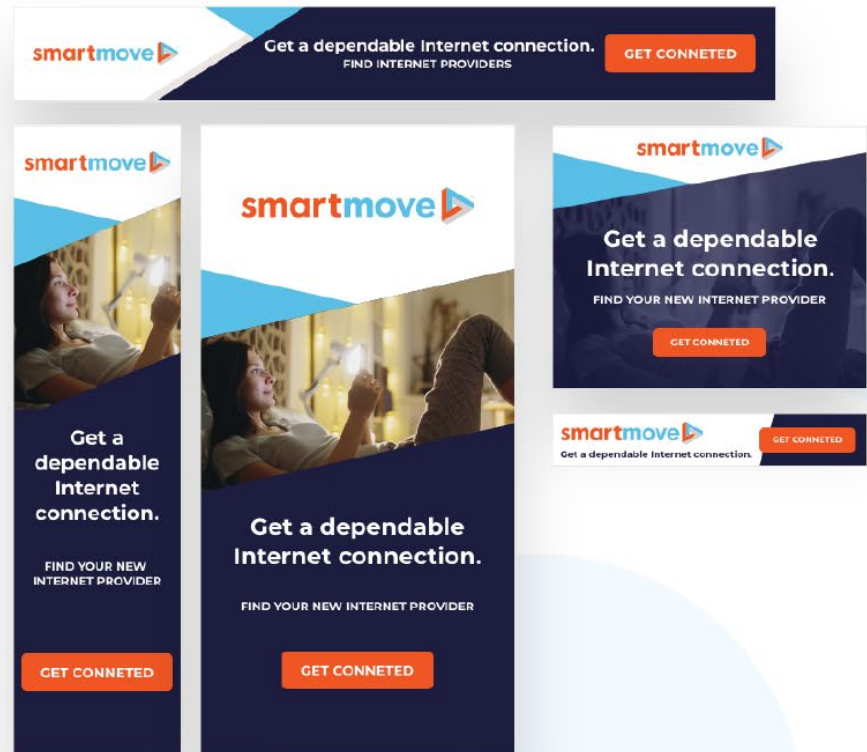
👍 Like 💬 Comment ➦ Share 🌐

📷 Write a comment... 📷 📷 📷

4

5G Messaging Framework & Execution

CONNECTIVITY
Display Ads



5G Messaging Framework & Execution



Security

POTENTIAL AD COMPONENTS

Security

The following are individual sets of text, headlines, link descriptions, and images that will be tested in various combinations through Facebook. We will let the market decide which pieces resonate most effectively, and Facebook's algorithm will automatically adjust to serve the most impactful combinations of creative.

5G Messaging Framework & Execution

AD CREATIVE

Security

TEXT:

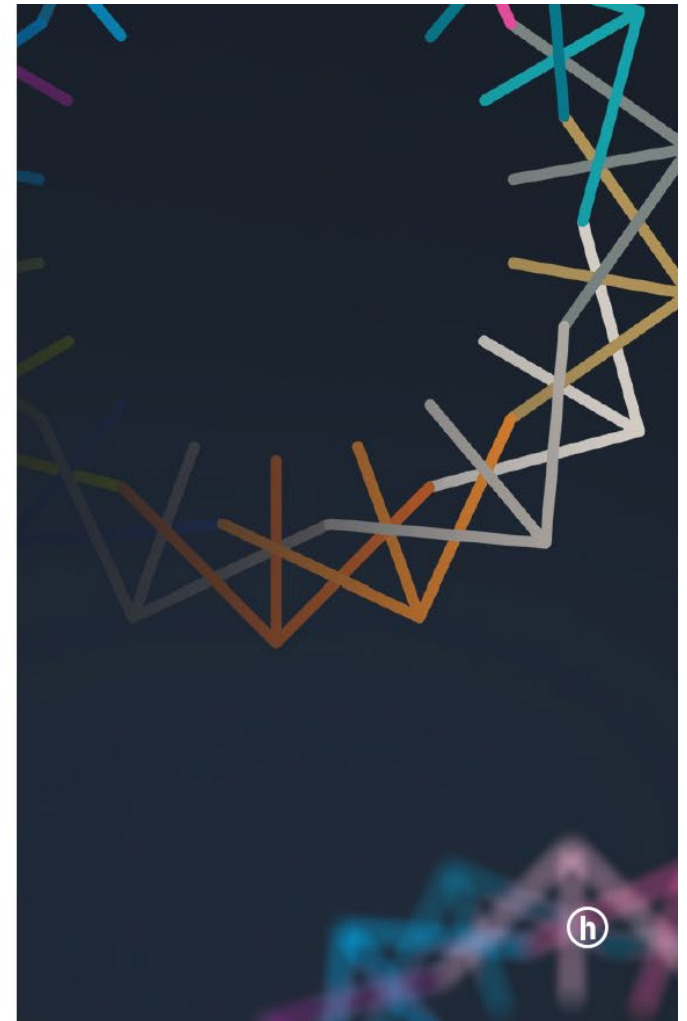
Spending more time at home? Make sure your Internet connection is secure.

Keep your home safe with a secure Internet connection.

Protect what's most important and get a secure Internet connection for your new home.

Protect your home with a secure and reliable Internet connection.

5G Messaging Framework & Execution



AD CREATIVE

Security

HEADLINES:

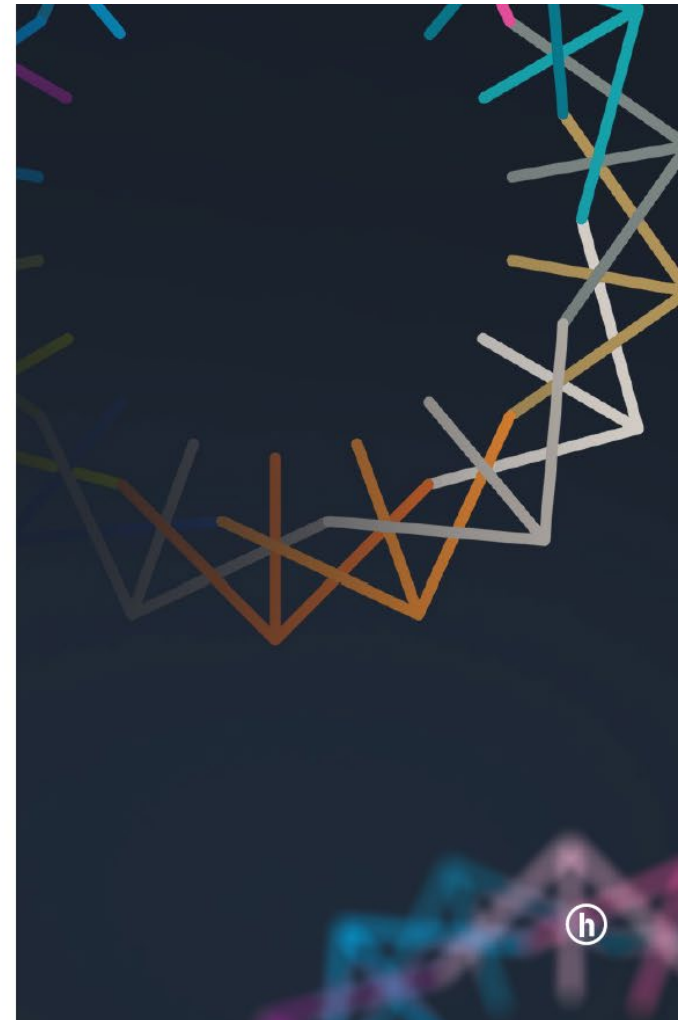
Secure your Internet connection.

Protect your new home.

Secure your home's connectivity.

Choose a secure Internet provider.

5G Messaging Framework & Execution



AD CREATIVE

Security

LINK DESCRIPTIONS:

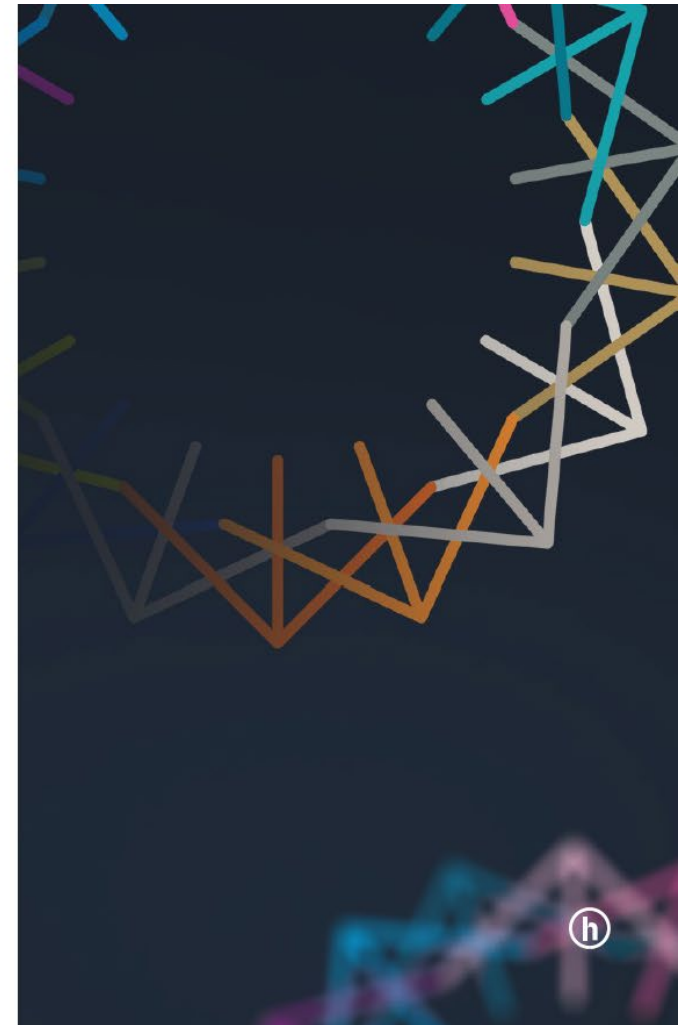
[Explore Internet Options](#)

[Find Internet Providers](#)

[Find Your New Provider](#)

[Connect Your New Home](#)

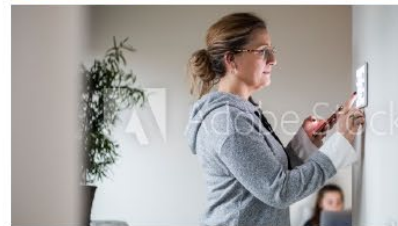
5G Messaging Framework & Execution



AD CREATIVE

Security

IMAGES:



5G Messaging Framework & Execution

POTENTIAL AD COMBINATIONS

Security

The following are potential combinations of text, headlines, link descriptions, and images Facebook may use to create full ad sets. We will let the market decide which pieces resonate most effectively, and Facebook's algorithm will automatically adjust to serve the most impactful combinations of creative.

5G Messaging Framework & Execution

SECURITY


Potential Facebook Ads

A/B Testing text, image, headline, and link description

TEXT →

SmartMove
October 6 at 7:32 PM · 🌐

Spending more time at home? Make sure your Internet connection is secure.



SMARTMOVE.US/INTERNET

Secure your Internet connection. [Learn More](#)

Explore Internet Options

👍👎 8 4 Shares

👍 Like 💬 Comment ➦ Share 🌐

📷 Write a comment... 🗨️ 📷 📧 📌


1

HEADLINE →

LINK DESCRIPTION →

SmartMove
October 6 at 7:32 PM · 🌐

Keep your home safe with a secure Internet connection.



SMARTMOVE.US/INTERNET

Protect your new home. [Learn More](#)

Find Internet Providers

👍👎 8 4 Shares

👍 Like 💬 Comment ➦ Share 🌐

📷 Write a comment... 🗨️ 📷 📧 📌

2

5G Messaging Framework & Execution

SECURITY

Potential Facebook Ads

A/B Testing text, image, headline, and link description

 **SmartMove**
October 6 at 7:32 PM · 🌐

Protect what's most important and get a secure Internet connection for your new home.




SMARTMOVE.US/INTERNET
Secure your home's connectivity. [Learn More](#)
Find Your New Provider

👍❤️ 8 4 Shares


👍 Like 💬 Comment ➦ Share 🌐

📷 Write a comment... 📷 📷 📷

3

 **SmartMove**
October 6 at 7:32 PM · 🌐

Protect your home with a secure and reliable Internet connection.



SMARTMOVE.US/INTERNET
Choose a secure Internet provider. [Learn More](#)
Connect Your New Home

👍❤️ 8 4 Shares

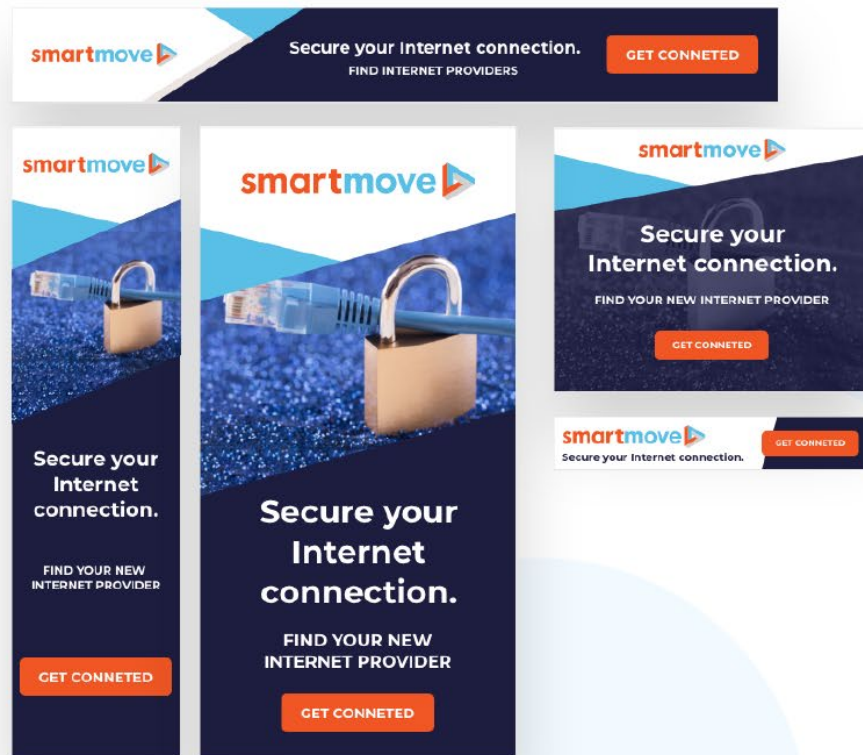
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4

5G Messaging Framework & Execution

SECURITY
Display Ads



5G Messaging Framework & Execution



Empowerment



POTENTIAL AD COMPONENTS

Empowerment

The following are individual sets of text, headlines, link descriptions, and images which will be tested in various combinations through Facebook. We will let the market decide which pieces resonate most effectively, and Facebook's algorithm will automatically adjust to serve the most impactful combinations of creative.

5G Messaging Framework & Execution

AD CREATIVE

Empowerment

TEXT:

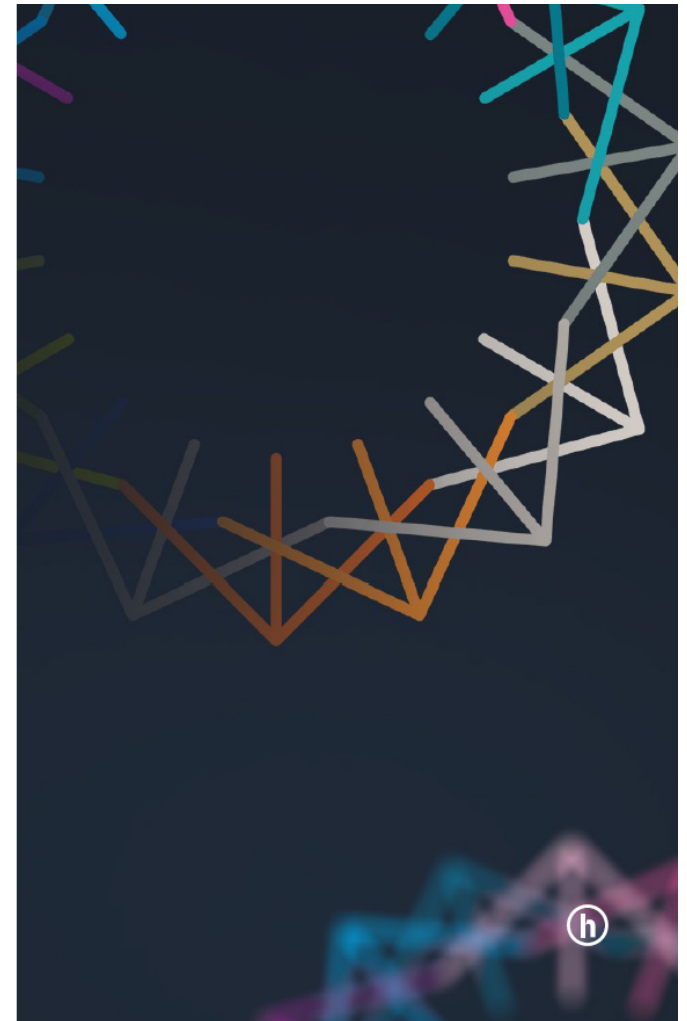
Get high-speed, reliable Internet to keep your whole home connected.

Working from home? Get the reliable Internet connection you need to get the job done.

Find the high-speed, reliable Internet connection you need for your new home.

Power your whole home with a fast, reliable, and secure Internet connection.

5G Messaging Framework & Execution



AD CREATIVE

Empowerment

HEADLINES:

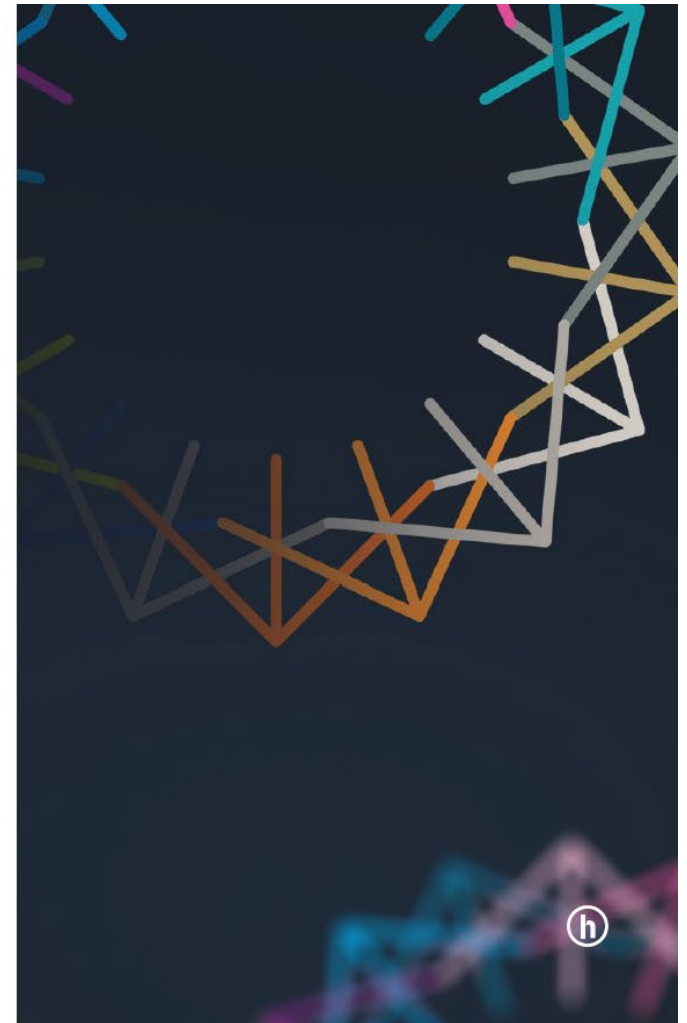
Empower your new home.

Empower your new workspace.

Empower your connected devices.

Empower your home's connectivity.

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AD CREATIVE

Empowerment

LINK DESCRIPTIONS:

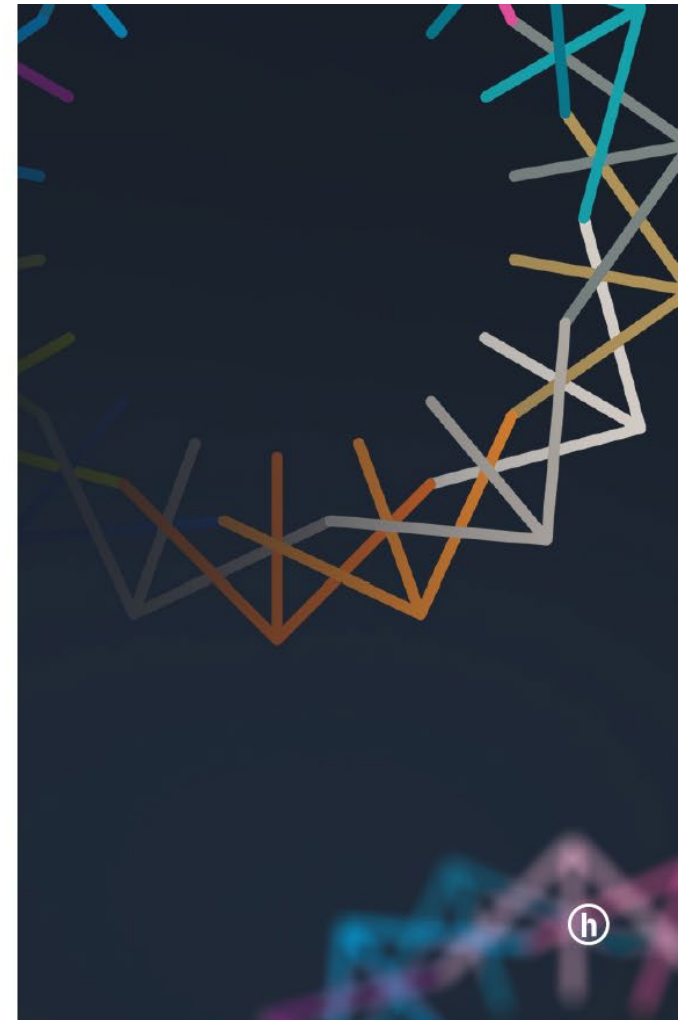
Explore Internet Options

Find Internet Providers

Find Your New Provider

Connect Your New Home

5G Messaging Framework & Execution



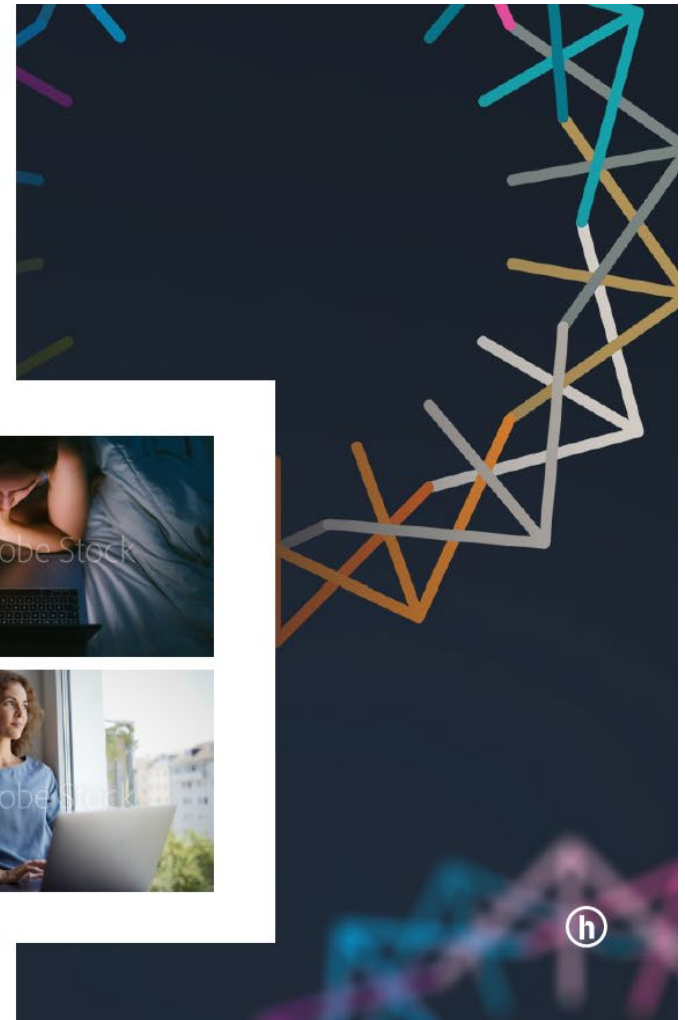
AD CREATIVE

Empowerment

IMAGES:



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POTENTIAL AD COMBINATIONS

Empowerment

The following are potential combinations of text, headlines, link descriptions, and images Facebook may use to create full ad sets. We will let the market decide which pieces resonate most effectively, and Facebook's algorithm will automatically adjust to serve the most impactful combinations of creative.

5G Messaging Framework & Execution


EMPOWERMENT Potential Facebook Ads

A/B Testing text, image, headline, and link description

TEXT →

SmartMove
October 6 at 7:32 PM · 🌐

Get high-speed, reliable Internet to keep your whole home connected.



SMARTMOVE.US/INTERNET
Empower your new home. [Learn More](#)

LINK DESCRIPTION → Explore Internet Options

👍👍 8 4 Shares


👍 Like 💬 Comment ➦ Share 🌐

📷 Write a comment... 🗨️ 📷 📧 📌

1

SmartMove
October 6 at 7:32 PM · 🌐

Working from home? Get the reliable Internet connection you need to get the job done.



SMARTMOVE.US/INTERNET
Empower your new workspace. [Learn More](#)

Find Internet Providers

👍👍 8 4 Shares

👍 Like 💬 Comment ➦ Share 🌐

📷 Write a comment... 🗨️ 📷 📧 📌

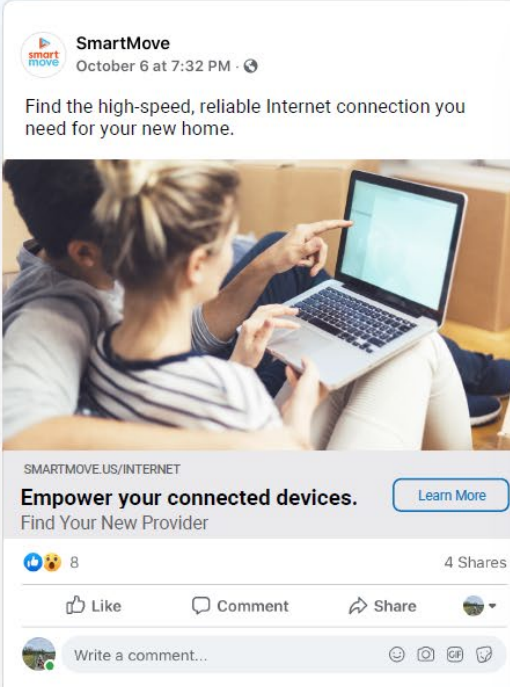
2

5G Messaging Framework & Execution

EMPOWERMENT


Potential Facebook Ads

A/B Testing text, image, headline, and link description



SmartMove
October 6 at 7:32 PM · 🌐

Find the high-speed, reliable Internet connection you need for your new home.



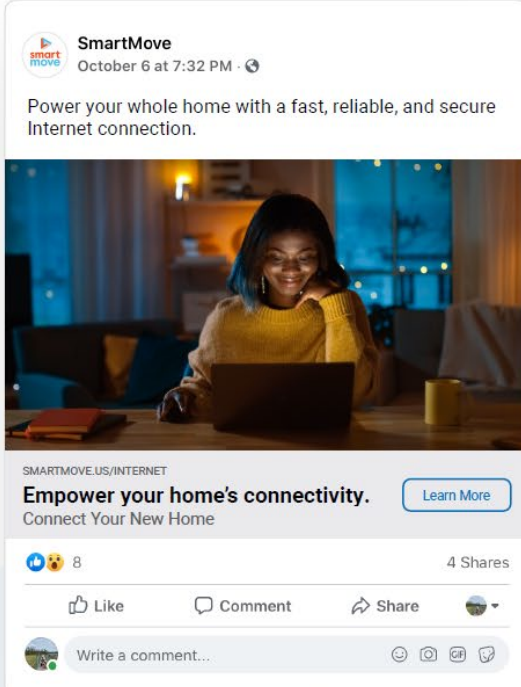
SMARTMOVE.US/INTERNET
Empower your connected devices. [Learn More](#)
Find Your New Provider

👍👍 8 4 Shares

👍 Like 💬 Comment ➦ Share 🌐


📷 Write a comment... 📷 📷 📷

3



SmartMove
October 6 at 7:32 PM · 🌐

Power your whole home with a fast, reliable, and secure Internet connection.



SMARTMOVE.US/INTERNET
Empower your home's connectivity. [Learn More](#)
Connect Your New Home

👍👍 8 4 Shares

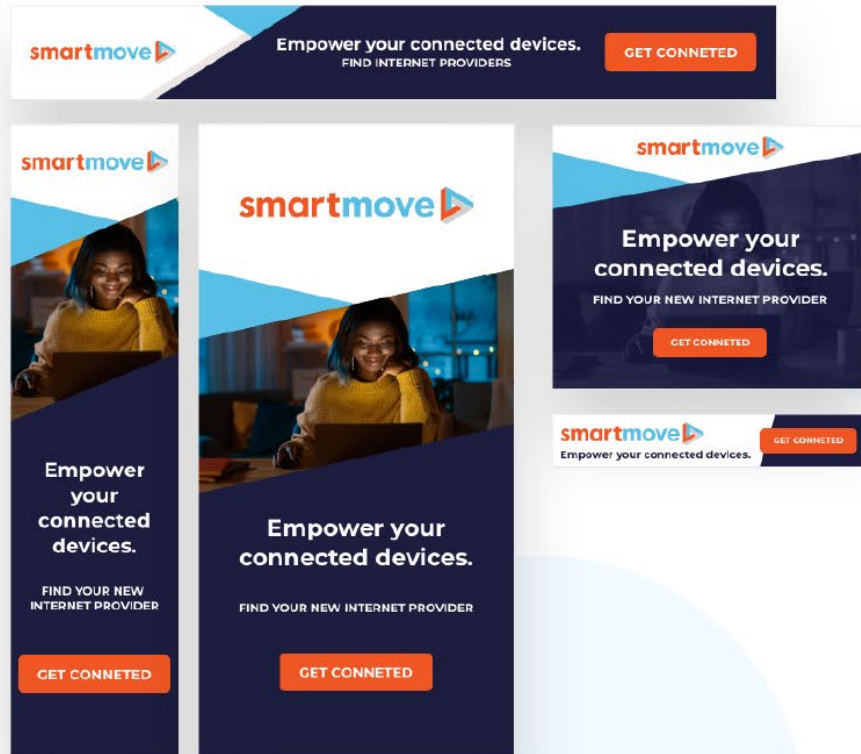
👍 Like 💬 Comment ➦ Share 🌐

📷 Write a comment... 📷 📷 📷

4

5G Messaging Framework & Execution

EMPOWERMENT
Display Ads



5G Messaging Framework & Execution



Work and Learn from Home

CTAM Bundling Team

07.28.20

ICI Proprietary and Confidential

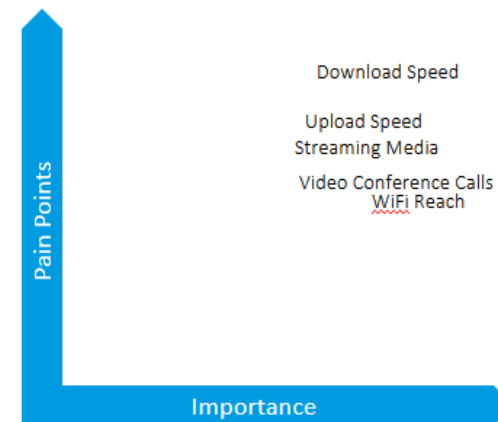


Work and Learn from Home

What needs have shifted or become more important?

Consumer Insights

- Need for speed, reliability and WiFi coverage still predominate
- Potentially more devices simultaneously needing access for different activities
 - Multi-user households have a need to support online school and learning
 - Importance of streaming media and video/audio conference calls
- Growing awareness of upload and download speeds
- More interest in learning how to optimize their Internet speed and security
 - Engagement with Panoramic Wifi App



Thought Starters on Bundles

COVID-19 economic impacts will continue to pressure consumer budgets

Trends continue to point to a sustained need for work and learn from solutions

New Internet usage, attitudes and behaviors for consumers with Internet, TV, Smart Home and Voice services

- Seek to identify and understand new persona opportunities with tailored bundle solutions

