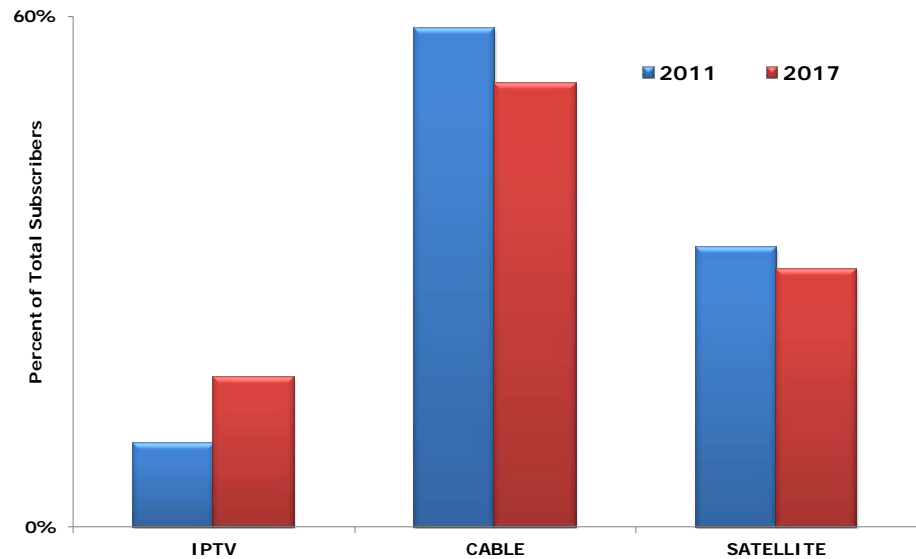


**Synopsis**

This report analyzes the North American market for consumer TV services, including cable, IPTV, and satellite/DTH. It examines service provider activities and trends, competitive positioning, customer retention strategies, changing regulations, and new technologies attempting to break into the space, including Google Fiber and Aereo. The report analyzes forces that impact current offerings, including carriage and retransmission issues, OTT video services, multiscreen services, and VOD. The report includes forecasts for subscriber and ARPU trends through 2017.

**The Change in Pay-TV Market Share**

**U.S. Pay-TV Market Share Change**  
(% of Subscribers)



**Publish Date:** 3Q 12

“The saturation of the North American pay-TV market means that subscriber growth, if it happens, is going to be dependent on an operator’s ability to both retain customers through perceived product value and customer service and attract their competitor’s customer, often with highly discounted offers that cut into the bottom line,” said Jim O’Neill, research analyst, Parks Associates. “Service providers also are going to struggle to increase ARPU as content costs increase. Over time, equilibrium will be established, but we’re going to see more carriage and retransmission battles – some of them disruptive – before that happens.”

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