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# The Transformation of North American Pay TV

**Shuky Sheffer**

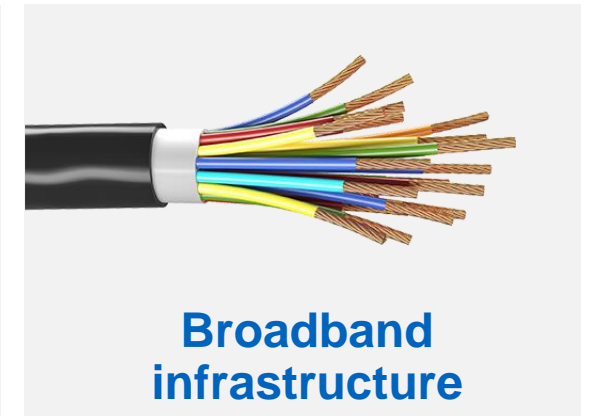
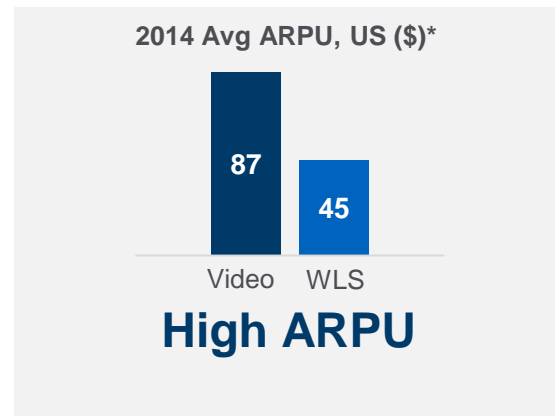
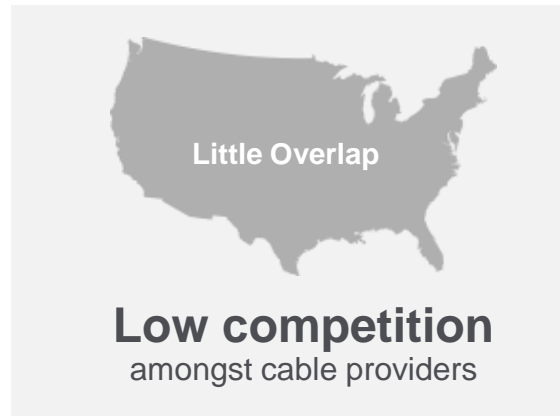
President, Customer Business Group

amdocs



# North American Cable & Satellite: History

Cable/satellite market in North America is good business

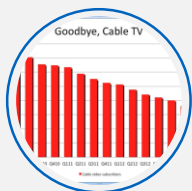


It was so good, there was no perceived need for transformation

**But the world is changing...**

# North American Cable & Satellite: Today

## Market Pressures



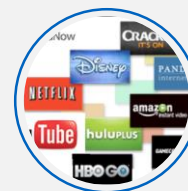
Linear video decline



Cost of content



Gigabit internet



OTT competition



Customer behavior



Regulation

## Market Opportunities



Integrated or rival OTT Offers



Expand TV beyond the living room



Customized and personalized experience



Freemium model (gets you hooked)



Next Gen social customer service



Advertising



Enterprise

# Cable & Satellite Operators Are Seizing This Opportunity


 / TimeWarner  
*Under Review by Regulator*


 / 


 /  / 


 / 

 /   
*Blocked by Regulator*

 Multi-play & OTT

 Video on-the-go/Wi-Fi

 Accelerate growth in enterprise  
(business services)

 Improve customer  
experience



# Four Transformation Imperatives: Supported by Amdocs



**Improve customer experience**

- **Move to Digital:** consolidate disparate portals, improve online experience
- From household based to **personalized** engagement
- **Gradual modernization** as a digital enabler



**Accelerate growth in enterprise**

- **End-to-end enterprise** offering: accurate quoting, hybrid fulfillment and digital engagement



**Multi-play, OTT & Video on-the-go/ Wi-Fi**

- Full **multi-play** offering: one platform, all business lines
- Enabling **Wi-Fi** calling & **Wi-Fi** optimization



**M&A: system consolidation and cost savings**

- Support **system consolidation** & provide **Managed Services** across multiple platforms
- Gradual migration approach to **reduce cost**



# Customer Success Highlights

**Charter**  
COMMUNICATIONS

 **ROGERS**

  
**COMCAST**

 **altice**

 **DIRECTV**

  
LIBERTY GLOBAL

**astro**

**J:COM**



# Summary

Cable & satellite operators are embarking on transformation **today**

**Amdocs is** their partner in this

We invested in an extensive digital solution for **customer care** and full **multi-play** capabilities to address expansion to wireless segment

We have a **leading presence** in the global Pay TV market, with significant upside

Amdocs has the **R&D and delivery scale** to support future requirements

Thank You

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