

PORTLANDTV[●]

CASE STUDY:

**VOICE OF THE CUSTOMER THROUGH THE EMPLOYEE;
DRIVING THE CONTACT CENTRE BACK TO THE FUTURE**

PORTLANDTV[●]

- ▶ Pay-TV Operator across Sky, Virgin and Freeview
- ▶ Operating in UK since 1995
- ▶ Mature Subscriber Base
- ▶ 10 years managing outsource call centre operations

Shaping the contact profile

01

Cost Reductions

Internal pressure to reduce cost by reducing contacts and eliminating whitemail

02

Industry Trends

As the pay-TV industry trends towards OTT and streaming services new technology has introduced new platforms, more automated acquisition flows and self service account management

03

Outsource Contact Centre Partners

As contact centre providers look to control their own costs and sell in new services they have pushed towards introducing more self service, live chat, social media and automated contact routes

Feedback from industry partners

01

Cord Cutters - People leaving traditional TV Platforms

02

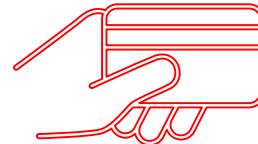
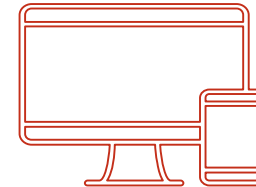
Introduce new online/app based acquisition

03

Expand onto new platforms

04

Adjust Pricing Models



Pay-TV World-Wide Trends

Fixed Screen
viewing down
2.5hrs per week

Mobile viewing
+4hrs

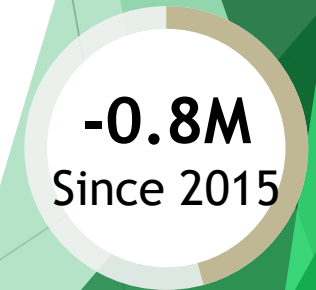
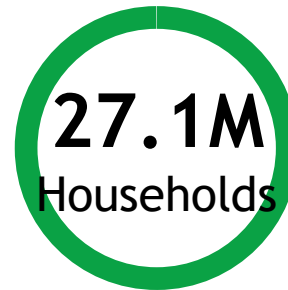
1 billion
minutes of TV
content watch
online weekly

Pay-TV subs
declined 19%
from Q3 '15 to
Q1 '17

90% 18-34yr
olds stream at
least some of
their content

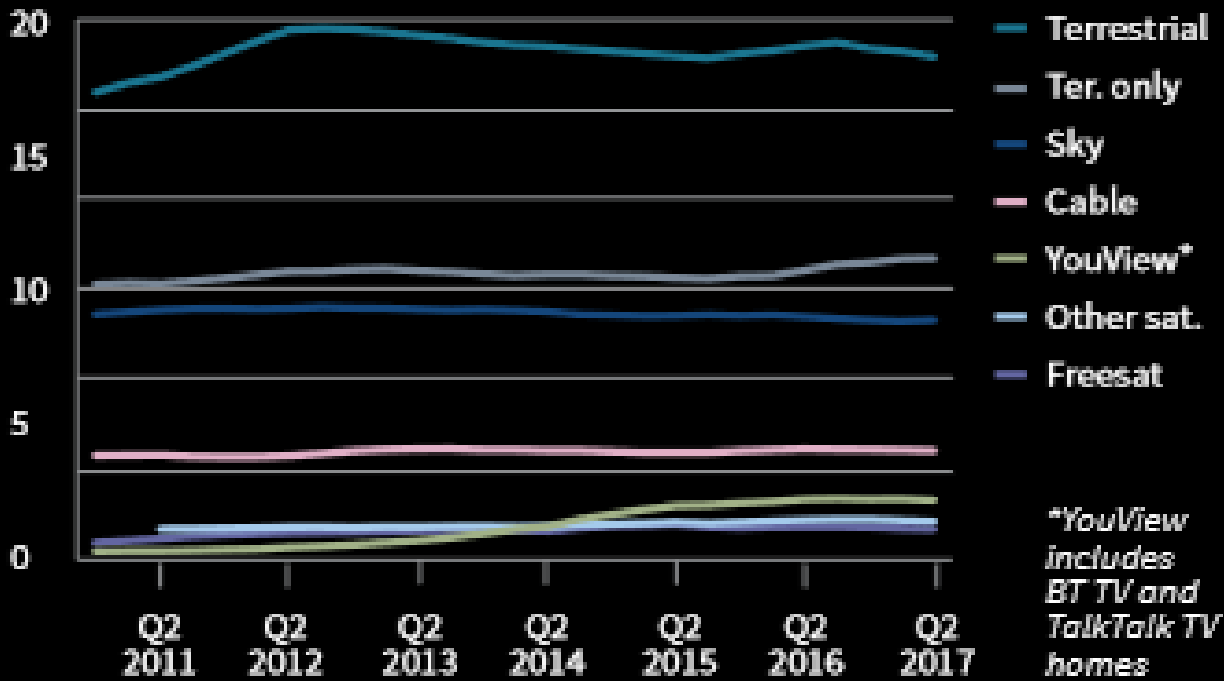


Does that really fit the UK Market?



UK TV HOUSEHOLDS BY RECEPTION TYPE

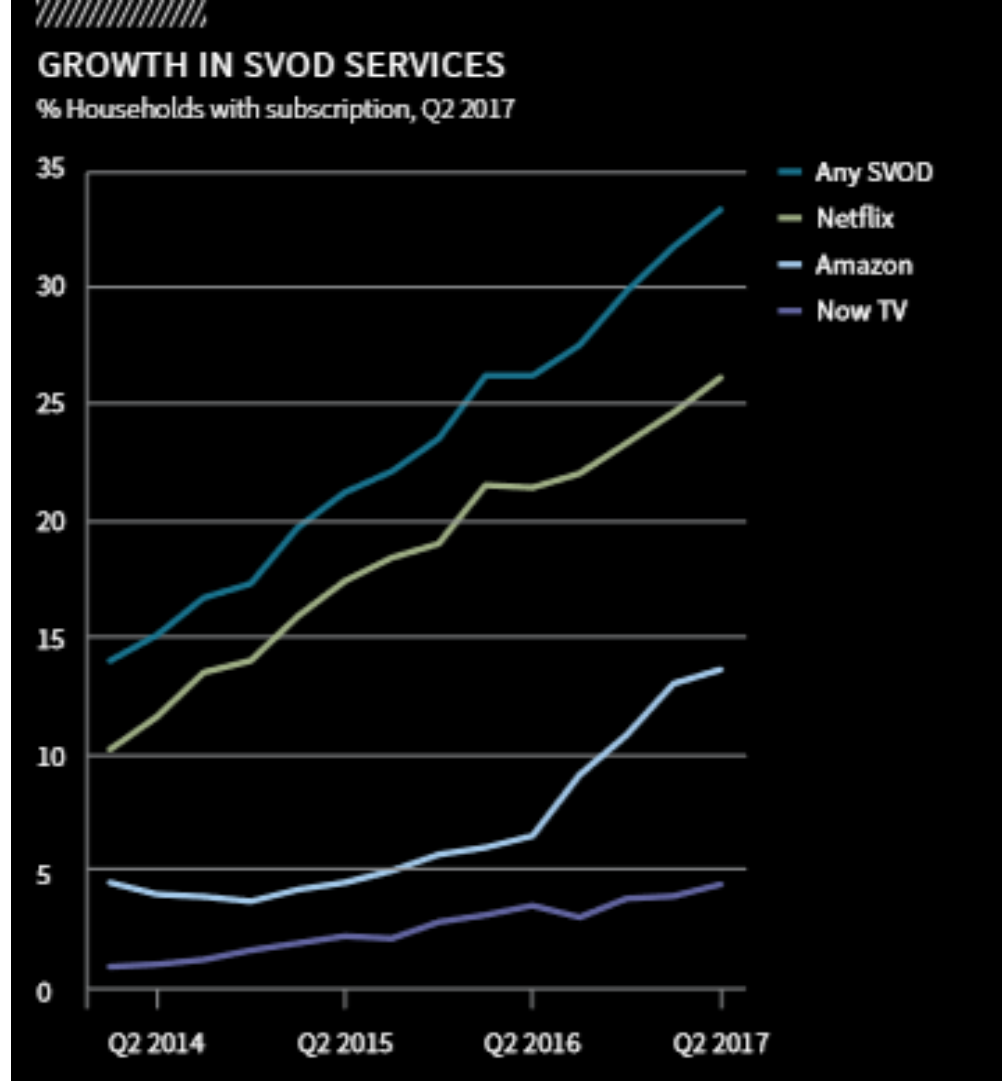
Q4 2010 - Q2 2017, 4 quarter moving average, millions of households



Pay-TV remains stable

Numbers on Sky and Virgin remain fairly stable

Growth on YouView and Terrestrial only



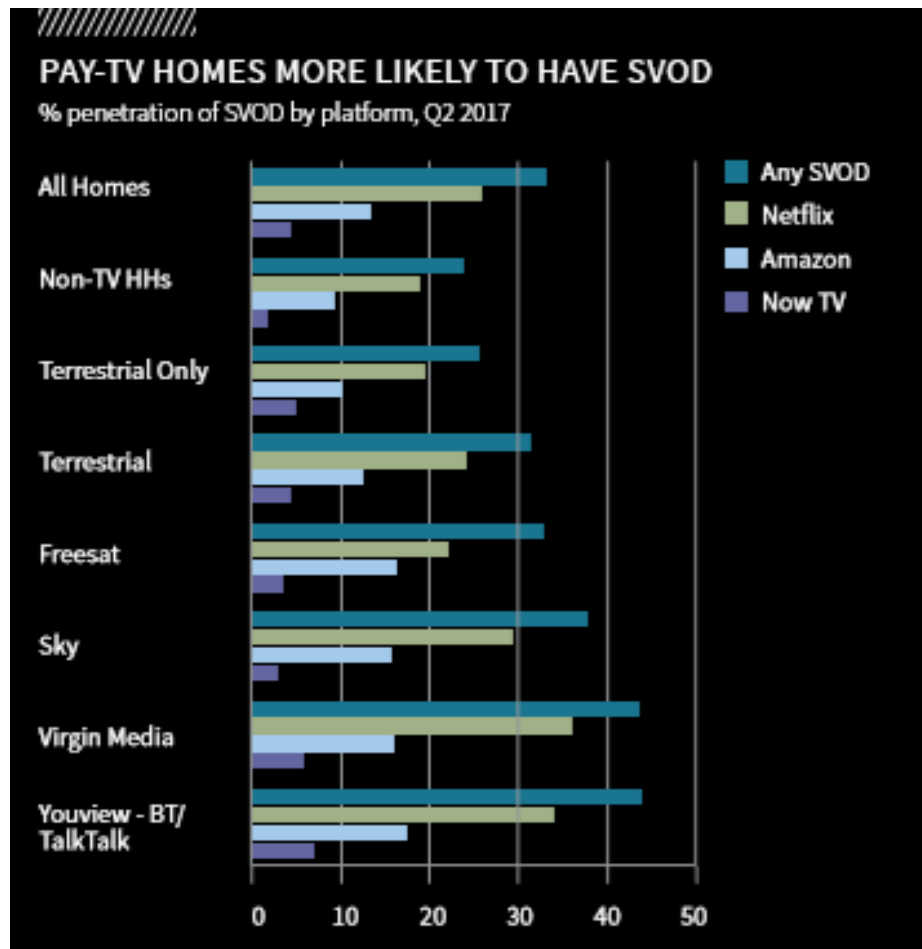
Growth Of SVOD

Netflix now in 26% homes - 7.3m

Amazon Prime now in 14% home

Growing fast with growth of 112% in last year

Now TV 1.2m homes



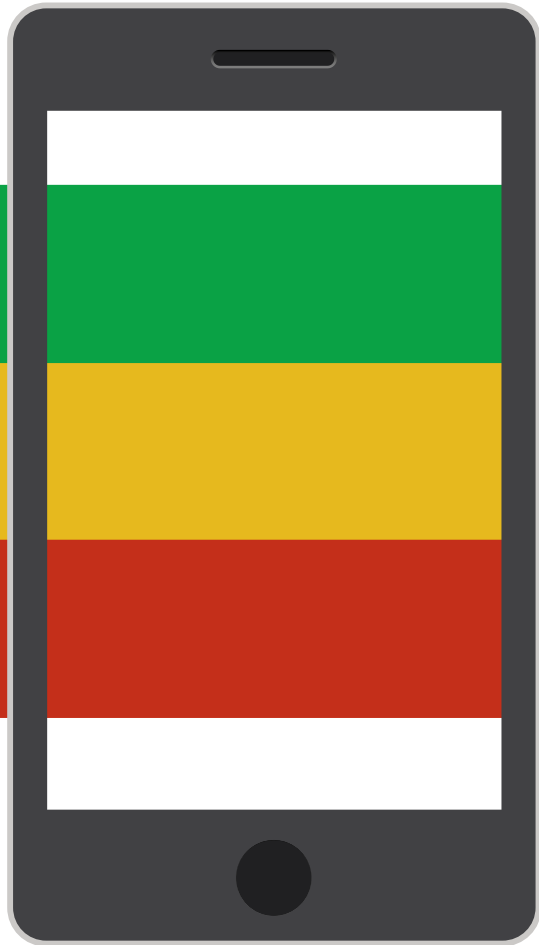
Pay-TV Homes More Likely To Have Additional SVOD

Netflix now in 26% all homes

Rises to 30% for Sky Homes and 36% for Virgin homes

In non TV homes falls to 24%

Who Is Using these new platforms?



16 - 24 year olds using SVOD

60%

Millenials who have never had pay-TV

35%

Prime customers also have Netflix - Complimentary

58%

Employee Feedback

Focus on contact regarding cancellation and outstanding balances

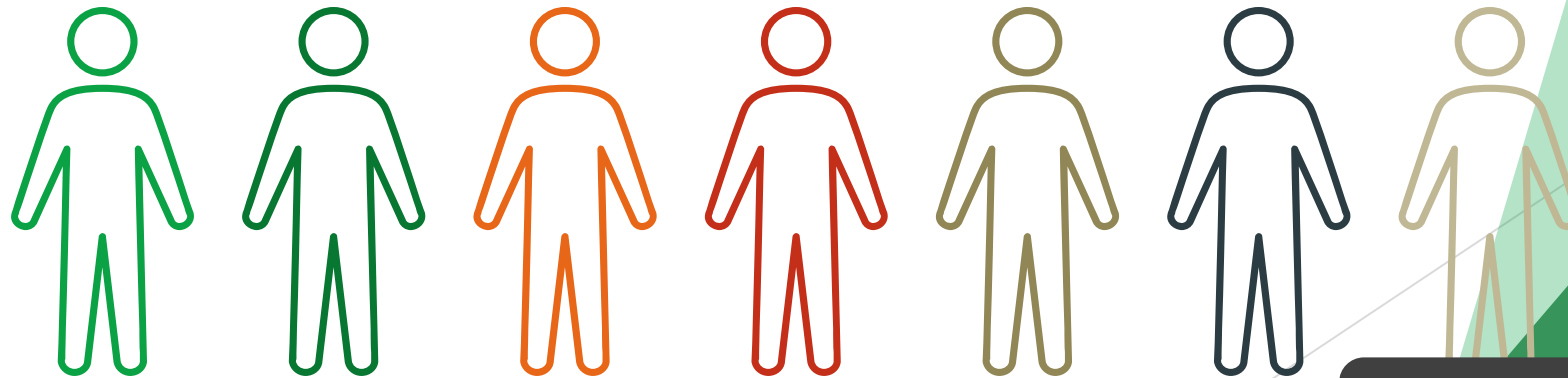
“It was to hard to find a number for you so I stopped my payments”

“I don’t trust talking to someone online, how do I know it’s even your company I’m talking to”

“I got an email but I didn’t know if it was genuine so I ignored it”

“I was waiting for a letter, like you used to send”

“I just want to speak to a person so I know the program will come on”



Conclusions



Results

