

# United States Telecommunications Report Q3 2016

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## Abstracts

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**BMI View:** The strong mobile market competition introduced by T-Mobile led to the cannibalisation of its competitors' customer bases, rather than contributing to further expansion in the number of basic phone users. Meanwhile, underlying market growth has come from connected devices, with the proliferation of smart homes and connected cars just the start of that particular market. In the wireline services sector, voice and TV continue to be under pressure, with the main growth driver being broadband and, especially, fibre broadband, underpinned by growing demand for heavy-data services. Regulatory decisions, such as the FCC changing its broadband definition to start at 25Mbps and the development of the Connected America Fund, will also drive broadband market growth, as operators look to offer higher speeds to customers.

### Latest Updates & Industry Developments

T-Mobile's Un-carrier strategy continues to dominate the market, with the carrier reporting almost 1.85mn net additions in Q116.

The cable players continue to dominate the broadband market, thanks to their larger footprint of advanced networks. In Q116, Comcast had 23.767mn subscribers, growing, compared with 15.764mn for AT&T.

Cord-cutting continues to impact the pay-TV market, with Netflix reporting 45.714mn subscribers, compared to 25.344mn for AT&T or 22.4mn for Comcast. However, cable players have stemmed some decline, through the introduction of skinnier bundles and streaming services.

Networking (SDN) will be among the key ingredients for future 5G experiences.



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