Pay-TV in the U.S. 2019

Table of Contents

Objectives/Overview/Methodology ......................................................... 2-4

Pay-TV Landscape

Key Findings and Trends ........................................................................... 5-7
Overview of Results .................................................................................. 8-33
Pay-TV Subscriptions Nationwide
Pay-TV Penetration Compared to Previous Years
Market Share Changes Compared to Previous Years
Distribution of Services by Location
Distribution of Services by Age, Income, Location, and Home Ownership
Non-Subscribers’ Most Recent Pay-TV Subscription
Top Reasons for Not Subscribing to a Pay-TV service
Non-Subscriber Trends by Income, Age, and Other Demographics
Non-Subscribers’ Use of SVOD Services and TV Antennas
Non-Subscribers’ Planning to Subscribe Again Compared to Previous Years
Current Subscribers not subscribing over the Past Two Years
Demographic Comparisons of Pay-TV Subscribers and Non-Subscribers

Subscribers & Reasons to Subscribe

Key Findings and Trends ........................................................................... 34-35
Overview of Results .................................................................................. 36-54
Main Decision-Maker in the Decision to Subscribe to a TV Service
Length of Time with Current Pay-TV Provider
Top Reasons for Getting Pay-TV Provider
Service Just Prior to Current Pay-TV Provider
Recent Disconnects — Current Pay-TV Service
Importance of Features in the Decision to Get TV Service Overall
Importance of Features in the Decision to Get TV Service Compared to Previous Years
Importance of Features in the Decision to Get TV Service by Subscription, and Age
Most Important Reasons to Get TV Service Overall
Most Important Reasons to Get TV Service by Video Subscription, Age, and Gender
Interest in Pay-TV Services with a Limited Number of Channels
Interest in the Ability to Customize a TV service
Interest in TV Everywhere

Satisfaction, Spending, and Likelihood to Switch

Key Findings and Trends ........................................................................... 55-56
Overview of Results .................................................................................. 57-76
Satisfaction with Pay-TV Provider
Subscribers’ Ratings of Provider by Category
Ratings of Providers Compared to Previous Years
Net Promoter Scores
Customer Contacts to Solve Problems and First Call Resolution of Problems
Pay-TV Subscriber Spending Compared to Previous Years
Spending on TV Service by Income
Household Spending Compared to Previous Years
How Subscribers Save Money Compared to Prior Years
Adding Service to Subscription Compared to Prior Years
Pay-TV Subscribers’ Likelihood to Switch
Most Common Reasons for Potentially Switching Pay-TV Service
Pay-TV Subscribers’ Likelihood to Disconnect
Number of Providers Available
Subscribers with Contract Agreements
Pay-TV in the U.S. 2019

Premiums & SVOD Services
Key Findings and Trends .......................................................... 77
Overview of Results ................................................................. 78-87
Premium Subscriptions among Pay-TV Subscribers
Premium Subscriptions by Income, and Age
Subscriber Spending by Premium Level Compared to Previous Years
Subscriptions by Premium Provider
Disconnecting, Downgrading and Adding Premium Services
Reasons for Dropping or Disconnecting Premium Service
Netflix Subscriptions Compared to Previous Years
Amazon Prime and Hulu Subscriptions Compared to Previous Years
Subscriptions to SVOD Services Overall
Distribution of Pay-TV and SVOD Services

TV, Watching TV and Related Services
Key Findings and Trends .......................................................... 88-89
Overview of Results ................................................................. 90-108
Number of TV Sets Used in the Home
TV Sets Connected to a Set-Top Box, or Not Receiving Pay-TV Programming
Average Hours of TV Watched Per Day Compared to Previous Years
Total Channels from Pay-TV Provider, and Total Channels Watched
Must Have Networks and Genres as Part of a TV Service
Most Frequently Viewed Genres of Programming
Awareness of Disputes Between TV providers and Networks
Usage of TV Everywhere and on-Demand
Consumers Currently in Bundles by Pay-TV Subscription
Consumers’ Online Subscriptions by Pay-TV Service
Moved in the Past Year
Expecting to Move in the Next Year
Various Products and Services in the Home by Pay-TV Service
Products and Services in the Home by Income
Products and Services in the Home Compared to Previous Years

Summary and Implications ......................................................... 109-110