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Leichtman Research Group

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64% OF TV HOUSEHOLDS HAVE A LIVE PAY-TV SERVICE

Pay-TV Penetration Continues to Vary Across Age Groups

Durham, NH – October 4, 2023 – New consumer research from Leichtman Research Group, Inc. (LRG) finds that 64% of TV households nationwide have some form of pay-TV service. The percentage of TV households that have a live pay-TV service (via cable, satellite, Telco, or Internet-delivered vMVPD) is down from 78% in 2018, 86% in 2013, and 87% in 2008.

Reflecting this decline, in TV households 70% of adults ages 45+ and 56% of ages 18-44 have a pay-TV service. Comparatively, in 2013, 88% of adults ages 45+ and 83% of ages 18-44 had a pay-TV service.

These findings are based on a survey of 1,769 households from throughout the United States, and are part of a new LRG study, *Pay-TV in the U.S. 2023*. This is LRG's twenty-first annual study on this topic.

Other related findings include:

- 48% of those that moved in the past year do not currently have a pay-TV service – a higher level than in any previous year
- 42% of renters do not have a pay-TV service – compared to 33% of homeowners
- 33% of non-subscribers last had a pay-TV service within the past three years, 37% last had a pay-TV service over three years ago, and 30% never had a pay-TV service
- Among those that never had a pay-TV service, 63% are ages 18-34, compared to 24% of former pay-TV subscribers
- The mean age of traditional pay-TV subscribers is 49.3 – compared to 42.5 among non-subscribers, and 40.8 with vMVPD-only
- Among all pay-TV subscribers, the mean reported spending per month is \$112.70 – 5% higher than the mean monthly spending in 2018

“The percent of U.S. TV households with a live pay-TV service waned over the past decade, with a more precipitous decline over the past five years,” said Bruce Leichtman, president and principal analyst for Leichtman Research Group, Inc. “The penetration of pay-TV remains lowest among younger adults and the categories that they tend to populate, including movers and renters. Today, 56% of ages 18-44 have a pay-TV service, compared to 83% a decade ago.”

About Leichtman Research Group, Inc.

Leichtman Research Group, Inc. (LRG) specializes in research and analysis on the broadband, media and entertainment industries. LRG combines ongoing consumer research studies with industry tracking and analysis, to provide companies with a richer understanding of current market conditions, and the adoption and impact of new products and services. For more information about LRG, please call (603) 397-5400 or visit www.LeichtmanResearch.com.

Pay-TV in the U.S. 2023 is based on a survey of 1,769 adults age 18+ from throughout the U.S. The random sample of respondents was distributed and weighted to best reflect the demographic and geographic make-up of the U.S. The survey, conducted in August-September 2023, included a sample of about 1,275 online and about 495 via telephone (including cell phone and landline calls). The overall sample has a statistical margin of error of +/- 2.3%. The online sample used exclusively for some questions has a statistical margin of error of +/- 2.8%.

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