The Self-Bundlers

WAVE 3 | 1Q 2023

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Background

Scripps began partnering with Screen Engine/ASI in 2021 to conduct research exploring the needs of TV consumers when it comes to building their ideal TV bundle.

With declining subscription rates for traditional cable and satellite packages, and the rise of standalone subscription services, TV consumers continue to explore their options when it comes to picking the perfect package. They increasingly choose to "self-bundle" rather than select an off-the-shelf package through a traditional provider.

Scripps continues to monitor the value proposition to consumers as they build their own, customized bundle and explore how digital antennas and over-the-air channels fit into this landscape.

This report is the third installment of this annual study. Each wave is based on interviews with 2,000 survey respondents.

The Self-Bunders takes a deep-dive into digital antenna adoption and delves into purchase intent, information sources, barriers to adoption, and emerging features that could make antennas more attractive to own.

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What is self-bundling?

"Self-bundling" is a strategy used by consumers to select the specific content they choose to access, and the flexibility to opt in and out at will.

The goal of self-bundling is to get exactly what the viewer wants at a reasonable price. Optimal bundles can include a mix of subscription services and "free TV" (i.e., over-the-air channels and ad-supported streaming).

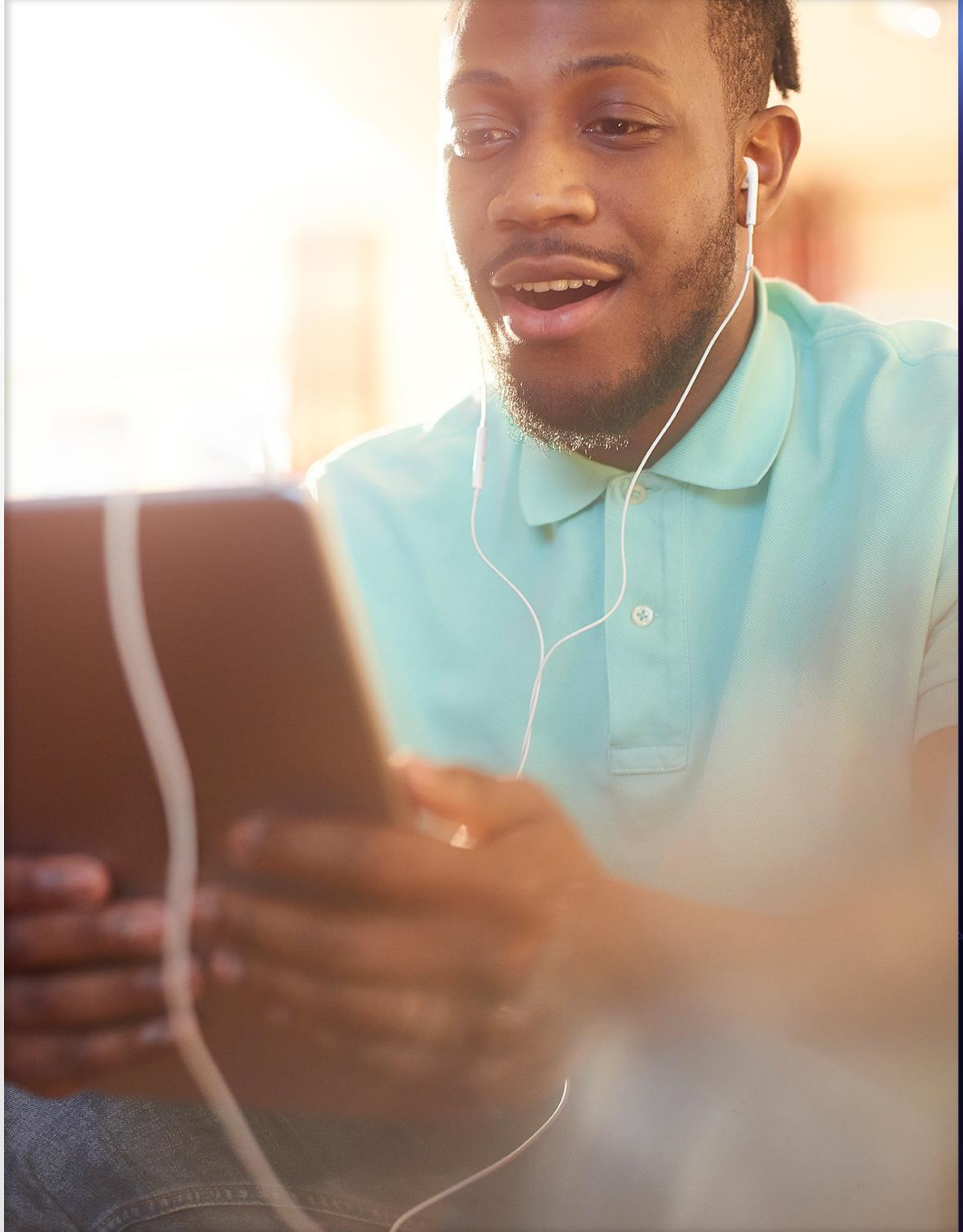
Self-bundling is fundamentally different than the traditional cable or satellite model. The latter is predicated on an all-encompassing subscription that remains static from year to year to year.

EMERGING SELF-BUNDLER




A few key stats from this report

4	The average number of technology platforms consumers use to watch TV. This includes traditional ones like cable or satellite, as well as paid streaming services, free streaming, Smart TV's, digital antennas, and other connected devices. Many use multiple iterations within a platform; for example, subscribing to more than one SVOD service or having more than one antenna.
5	The average number of paid streaming services the average subscriber uses – including Netflix, Disney+, HBO Max, and other fee-based services. Most subscribers also have access to free streaming platforms.
32%	The percentage of respondents citing "free or low cost" as the most important feature when building their ideal TV bundle. This was the #1 feature cited by survey respondents – far ahead of the #2 choice ("access to live TV" at 15%).
2:1	The ratio of the monthly expense for TV services paid by cable, satellite and telco subscribers as compared to antenna owners, even though both groups express similar levels of satisfaction.
50%	The percentage of consumers surveyed who said they'd consider buying a digital antenna during the next year.



Key Findings

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Key findings at a glance

Consumers continue to eye the bottom line when considering their TV service. Cost-conscious decision making is fueling strategic bundling to maximize choice without increasing spend.

Reported cable and satellite TV usage continues to decline, which is down -10% pts. and -7% pts. over the past two years. Meanwhile, free streaming has doubled over the same time-period, rising to 37% of total consumers and 48% of antenna users.

SVOD usage also is increasing, with the average entertainment consumer now subscribing to five services. However, this increase has not led to a greater outlay due to cord-cutting. The average monthly cost for all TV services has dipped slightly year-over-year ($104 vs. $108 in 2022).

Intentions to add digital antennas continue to rise year over year. Back in 2021, only 8% claimed they expected to add a digital TV antenna. Today, 18% plan to either add or upgrade their TV antenna in the next 6 months.

More than one-third of consumers (35%) feel they will add a free streaming service in the next six months. This is on par with 2022 (34%) and up significantly from 2021 (17%).

Antenna users continue to be thriftier than their MVPD counterparts. They prize free services and spend barely half of what cable/satellite/telco subscribers spend on total services.

Key findings at a glance

Many consumers are finding satisfaction with their current TV services, but this doesn't mean they aren't also open to change.

Although generally satisfied with their TV services, cable subscribers find this satisfaction comes with a high price tag. Most are open to alternatives. In fact, 83% except to make some type of change during the next year: switching providers, changing the configuration of their package, or dropping service altogether.

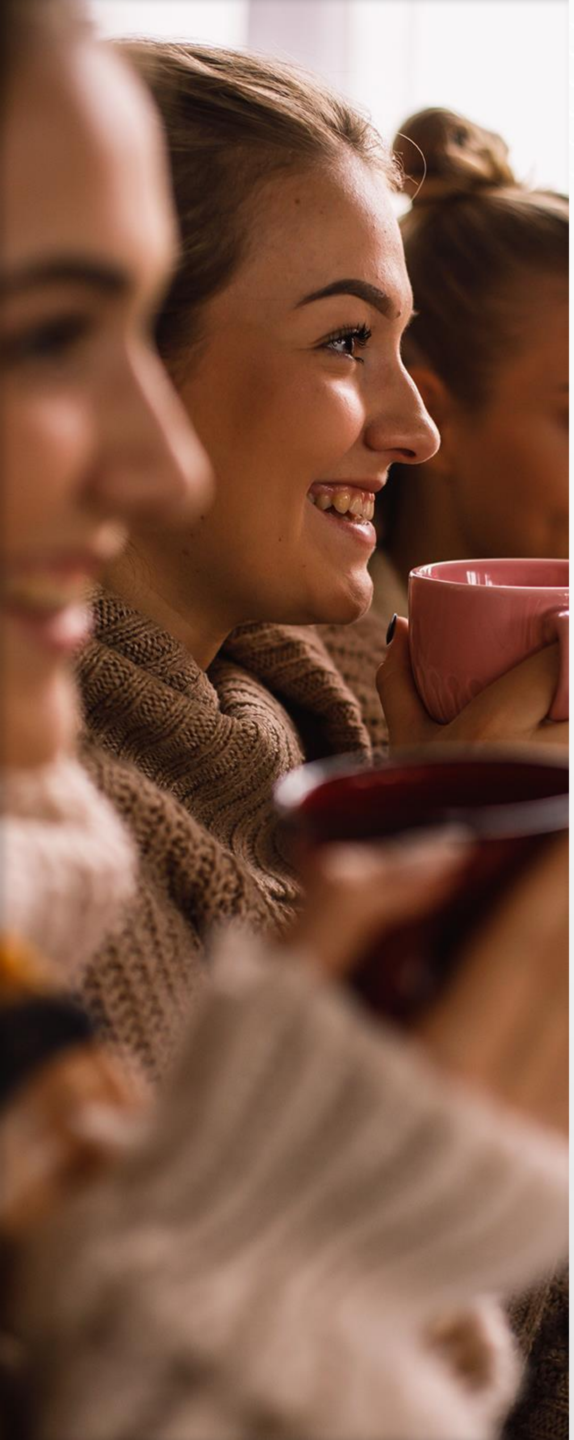
Antenna owners are less likely to be considering alternatives. Only 1 in 7 is considering adding cable or satellite service.

Antenna sales continue to be robust. More than one-in-five antenna users began using an antenna during the past year.

When it comes to figuring out what to buy when they make the switch, most consumers continue to purchase and research antennas online.

Many also shop for them at large electronic stores in order to capitalize on an in-person purchase experience. Information on product packaging and the expertise of retail staff helps drive selection.

Most current antenna users prefer indoor set-top or wall-mounted units over outdoor (rooftop) models.



Key findings at a glance

While more consumers are relying on SVOD services as their priority destinations for content, antenna users often lean heavily into broadcast TV as their top viewing choice, with SVOD playing a supporting role.

Antenna owners are significantly more likely than consumers overall to consider major broadcast and multicast networks “must haves” in their content bundle.

Still, antenna users average 5.3 SVOD subscriptions (up from 2021 and now equal to cable subscribers).

They are just as likely as consumers overall to subscribe to the big streamers like Amazon, Hulu and Netflix. They are less likely to pay for cable-based streamers such as HBO Max, Showtime and Starz.

Antenna users value live content more than MVPD subscribers, pulling local news and national news up in their genre affinity rankings, and slightly more likely to consider live sports one of their favorite things to watch.

Nostalgia is also a strong driver for antenna owners. They are much more likely to gravitate to nets that serve up comfort classics, like Antenna TV, the ION networks, MeTV, Laff, etc.

Moving forward

As consumers become more and more used to activating and deactivating subscriptions to suit their needs, and with concerns over a recession looming, will more turn to total self-bundling?

Consumers are becoming increasingly comfortable building their own entertainment stack. They are becoming accustomed to a self-serve model. This has made the decision to “cut the cord” feel less daunting – even for those largely satisfied with their current providers.

Further, with more streaming services available (and many of them free), it is more attractive to cut back on the full-service cable package that consumers’ historically preferred.

Augmenting streaming services with a digital antenna is a nature step for those familiar with how cheap these devices are and how easy they are to install and use.

Creating messaging that highlights antenna’s affordable nature and easy use – as well as promotes it as the original “subscription free” solution – could help soften the landing for those seeking to streamline entertainment expenses.

Additionally, communicating information about how consumers can maintain their connection to live news and sports, as well as tap into strong classic library content on a suite of nostalgia-inducing OTA nets, could help some on the fence about self-bundling feel more confident they’ll have the options they need.

The Landscape

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Between streaming services, cable, connected devices, and antennas, consumers continue to rely on about four different viewing methods.

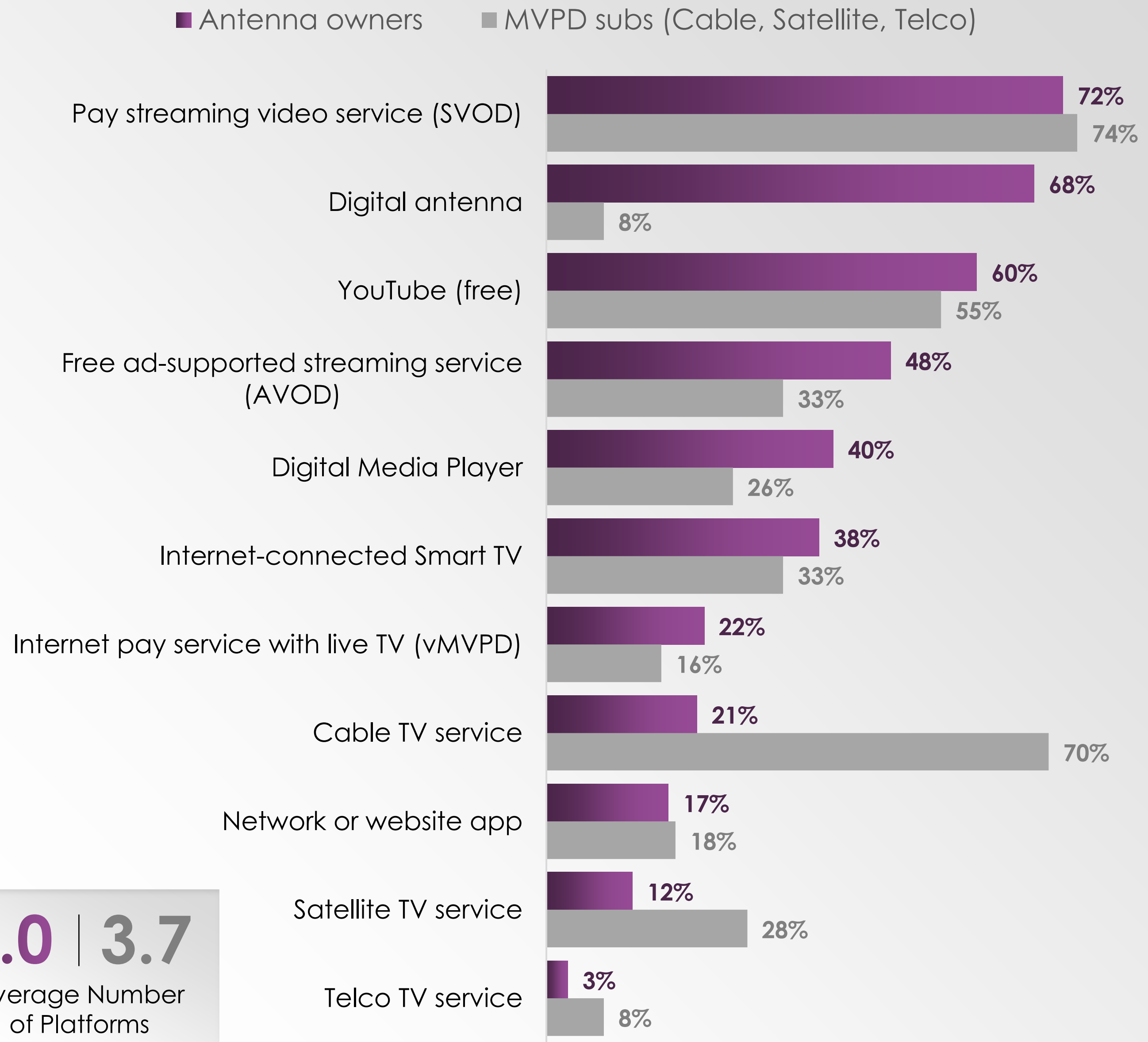
Subscription streaming services and free YouTube remain the most widely-used platforms.

Legacy providers like cable, satellite & telco continue to see erosion as audiences shift to more cost-effective solutions.

Free streaming services (i.e., PlutoTV & Tubi) continues to edge higher with expanding awareness but didn't see quite as much growth as in the previous year (usage nearly doubled in 2022 vs. 2021).

Antenna owners continue to use a slightly wider variety of platforms (4.0) than their cable/satellite/telco counterparts (3.7), levels which mirror 2022.

Methods used to watch television at home



4.0 | 3.7
Average Number of Platforms

Source: S8. Which of these do you use to watch television programs in your home? Base: Antenna owners (N=402), MVPD subscribers (N=1,000)

"Free" remains the most powerful factor for consumers as they consider what to include in their bundle.

Continuing the previous year's trend, consumers stated "free or very low cost" as the top feature when building the ideal TV bundle.

Price of service also remains more of a priority for antenna owners; they continue to be more price-conscious than the total audience.

Live TV and ad-free options are important secondary components within consumers' ideal package, with antenna users placing more emphasis on live TV access.

Most important feature when building ideal subscription package or bundle

	TOTAL	Antenna Owners
Is free or very low cost	32%	**41%**
Access to live TV	15%	16%
Has ad-free options	10%	6%
Access to network apps I can download to my Smart TV or Media Player	9%	9%
Allows me to add and drop services and subscriptions easily	9%	8%
Access to premium movies on demand	7%	5%
Access to a DVR to record shows I can't watch live	6%	4%
Access to premium sports events on demand	5%	3%
Only involves one device or subscription	4%	4%
Access to a robust free VOD (video on demand) service	4%	4%

Source: Q8. Now imagine you're building your own TV subscription package or bundle. What is the most important feature it would have? Base: Antenna users (N=402)

Access to major broadcast networks remains the top "must have" content for consumers, followed by subscription streaming services.

SVOD continues to gain importance among consumers year-over-year while major broadcast networks gradually decline. However, antenna users are uniquely immune to this trend as major broadcast networks remain their definitive top priority.

OTA networks & free streaming services are increasingly valuable to antenna users, who aggressively seek out lower cost options for programming.

"Must haves" in ideal subscription or bundle

abc CBS FOX ion NBC	TOTAL	Antenna Owners
Major Broadcast Networks	64%	**77%**
Subscription SVOD services	56%	45%
Free Streaming Services	30%	41%
Basic Cable or Satellite Packages	29%	27%
Over-the-Air Multicast Networks	27%	53%
Premium Subscription Services To Watch Live TV (vMVPD)	27%	24%
Expanded Cable or Satellite Packages	25%	19%
Premium Cable Networks	23%	21%

Source: Q12. Below are some types of networks and services. Please select the ones that are MUST HAVES in your ideal TV subscription or bundle. Base: Antenna users (N=402)

The number of paid subscription services in the bundle has been growing in recent years. Five services per household is the new norm.

While consistent across gender, younger consumers pay to access more services than their older counterparts – up to 6 services for ages 18-34 (vs. only 4.2 average for A50-64). Antenna owners are relying slightly more on paid subscriptions (+0.3 avg. vs. 2021), bringing them into step with MVPD subscribers.

The "Big 4" SVOD services (Netflix, Amazon Prime, Hulu & Disney+) hold strong in their positions, with several other services right at their heels. Peacock and Paramount+ continue to build their audience, including among Antenna owners.

Viewers aren't paying more, though. After factoring in cord-cutting, the average spend ($104) is actually down slightly from 2022 ($108).

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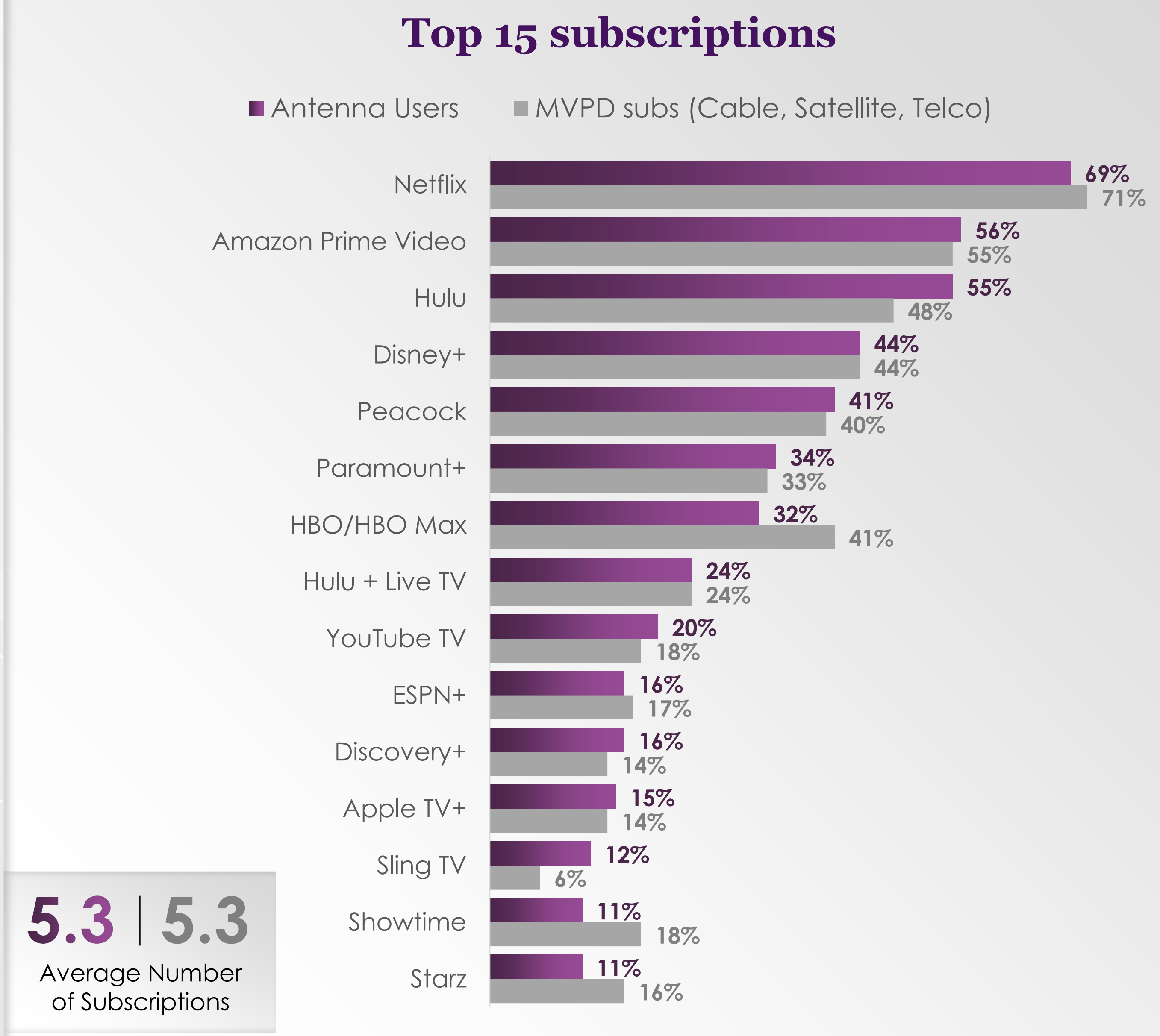
Source: S10. Which of these premium networks and service(s) does your household currently subscribe to or use? Base: Have services beyond just antennas: Antenna users (N=382), MVPD subscribers (N=1000)



While half of consumers reached a fully satisfying mix of TV services this year, the search continues for the other half as many continue to consider making changes.

Around half of current TV consumers are "very satisfied" with their current packages, +5 pts. from 2022, with similar increases among all age groups. However, consumer intentions to make a change within the next six months remain consistent, including 34% of "very satisfied" consumers still considering a shift.

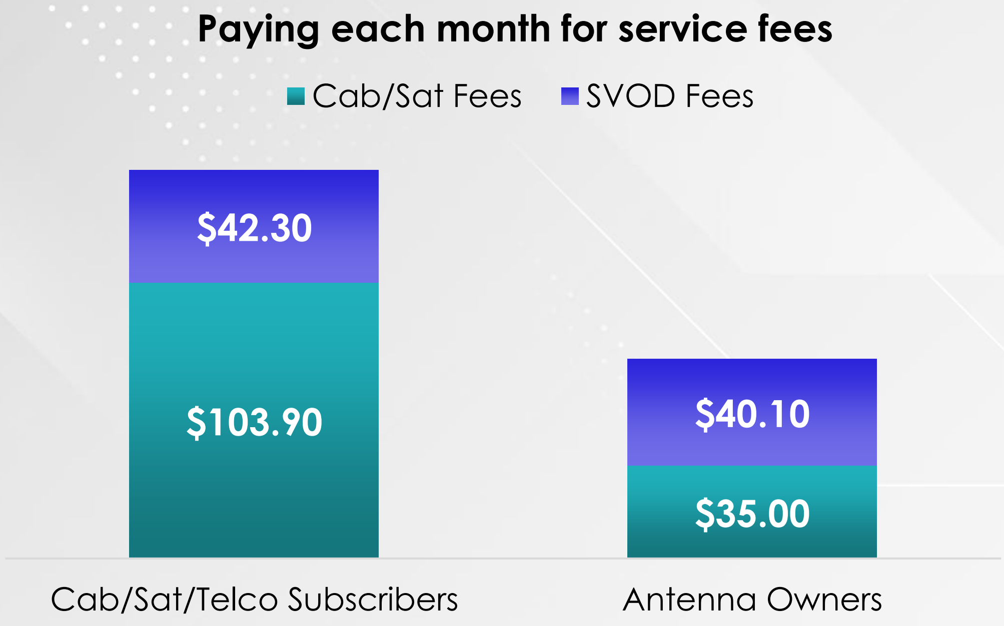
Consumers who are "very satisfied"	
Total	**51%**
P18-34	**56%**
P35-49	**51%**
P50-64	**45%**

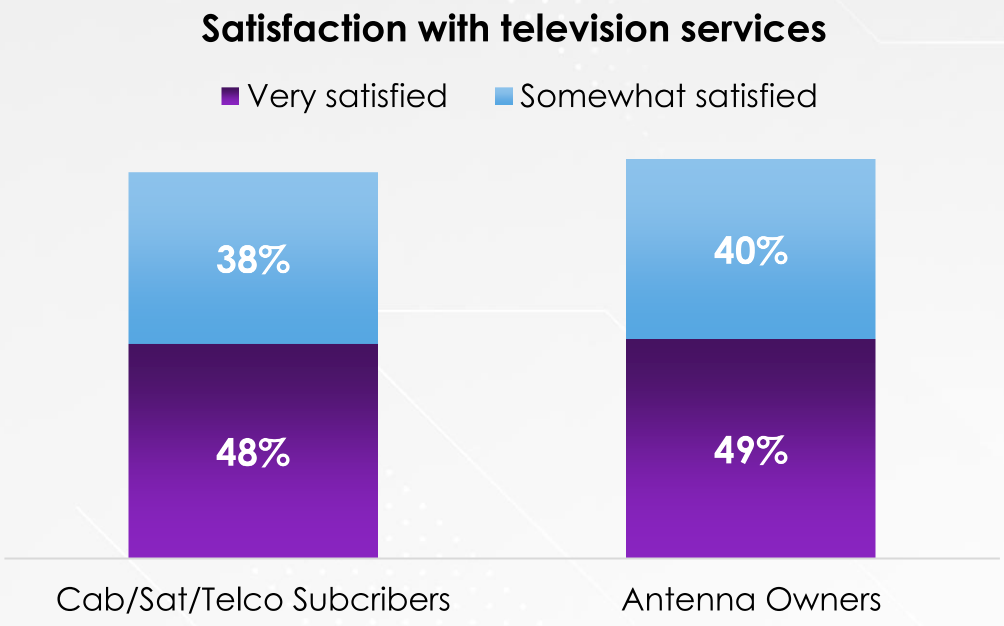
"How likely are you to change your current tv services in the 6 months?"	**Total**
Very likely to make a change	**11%**
Somewhat likely to make a change	**35%**
Somewhat unlikely to make a change	**28%**
Very unlikely to make a change	**26%**

Source: S12. Thinking about your TV service(s) as a whole, how satisfied are you? S13. Thinking about your TV service(s) as a whole, how likely are you to make any changes to your service and how much you pay for it in the next 6 months?

Cable/satellite/telco subscribers found greater satisfaction with their TV package this year – on par with antenna users' satisfaction – despite still paying almost twice as much.

Although not affecting their satisfaction, antenna users are paying slightly more than in prior years (+$2.50 on average vs. 2022), mostly putting the difference towards SVOD fees.





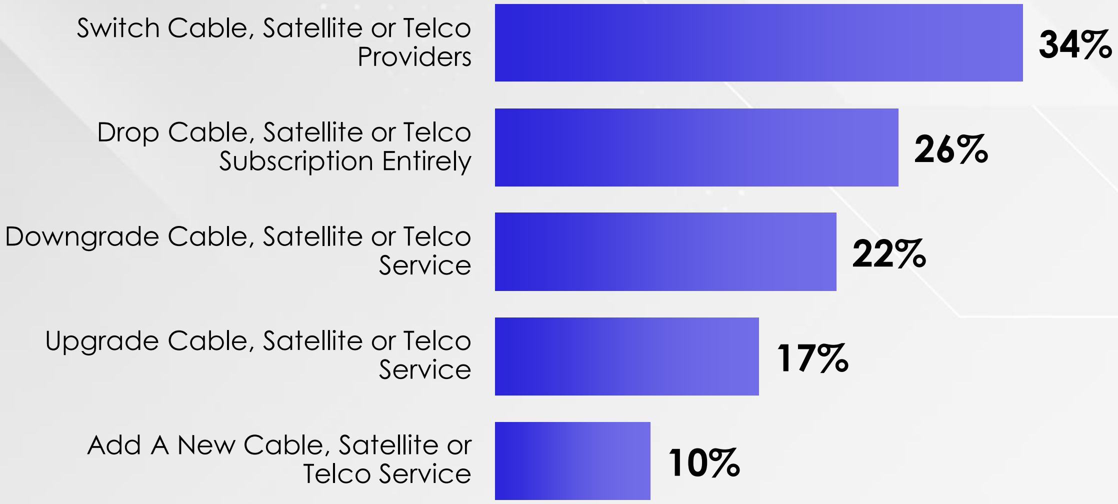
Source: S11. Thinking about all the TV services you subscribe to, including cable, satellite or telco service, as well as paid subscription streaming services, how much do you estimate you're paying per month? S12. Thinking about your TV service(s) as a whole, how satisfied are you? Base: Cable/Sat Subscribers (N=1000), Antenna users (N=402)

Cost continues to drive MVPD subscribers to actively consider a change in their service.

While continuing to look at other providers or thinner packages to cut costs, current MVPD subscribers are less willing to consider dropping their service entirely (-8 pts. vs. 2022). It suggests the market is moving to its hardest-core subscriber base.

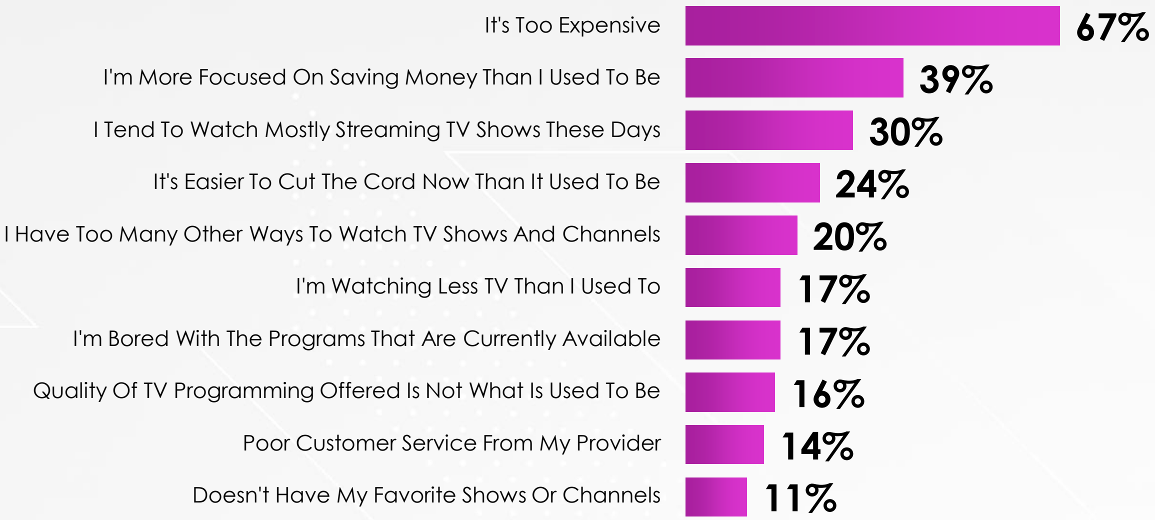
Likelihood of changing current MVPD subscription

MVPD subs (Cable, Satellite, Telco)



Top reasons to downgrade/cancel service

MVPD subs (Cable, Satellite, Telco)

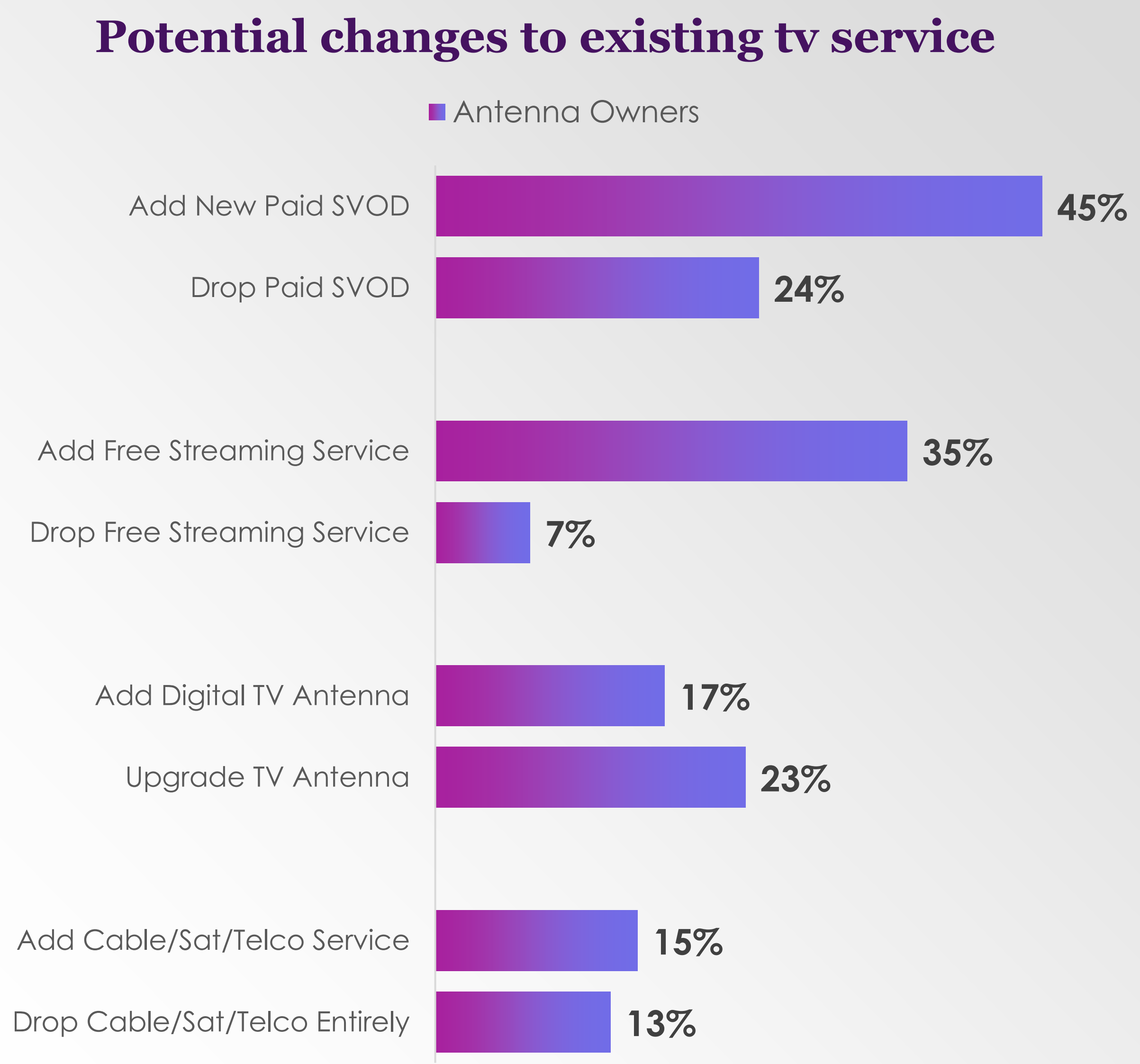


Source: S14a. What changes are you thinking of making to your TV service and how much you pay for it? (N=483) / S14b. What are your main reasons for thinking about downgrading or dropping your cable, satellite or telco subscription? (Respondents could choose multiple reasons.) Base: Thinking About Downgrading Or Dropping Cab/Sat Service (N=209)

Antenna owners' priorities continue to focus on expanding their access to streaming services and improving their ability to view free TV.

These consumers are much more likely to want to add SVOD and free streaming services than drop them.

Antenna owners show a very limited interest in adding or returning to a pricey MVPD subscription. As a group, they are just as likely to want to drop a current subscription as add a new one.



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Source: S14a. What changes are you thinking of making to your TV service and how much you pay for it? Base: Antenna Users Likely To Make A Change To Their TV Service In The Next 6 Months (N=201)

Sitcoms and local news find greater affinity among antenna owners, pulling them up with live sports and genre dramas as their favorites.

Non-owners of antennas tend to have a similar order of preference but prioritize uniquely live content a bit less (live sports, local news, national news, all -3 to -8% pts.).

Favorite program genres

	Total	Antenna Owners
Live sports	**36%**	**39%**
Fantasy and Sci-Fi Dramas	**34%**	**36%**
True Crime Reality	**32%**	**32%**
Procedural Dramas	**31%**	**34%**
Adult Animated Series	**28%**	**26%**
Thrillers	**27%**	**29%**
Sitcoms	**27%**	**35%**
Local News	**27%**	**35%**
National News	**22%**	**26%**
Family Comedies	**22%**	**24%**
Medical Dramas	**21%**	**21%**
Made for TV Movies	**19%**	**19%**
Reality Competition	**18%**	**21%**
Westerns	**18%**	**20%**
Game Shows	**18%**	**20%**

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Source: Q1. Please tell us how you feel about each of the following types of shows – "One of my favorites" Total (N=2000), Antenna owners (N=402)

One of the drivers of antenna adoption has been the increase in the number of channels that can be received in addition to the major broadcast networks.

New multicast networks (a.k.a. diginets) have launched each year since the 2009 "digital transition". Their schedules include movies, drama series, sitcoms, news, sports, reality programming – basically every genre imaginable.

Scripps is the leader in this market segment but additional broadcasters like Weigel, Sinclair, Nexstar, Gray, Tegna, and others have been increasingly active in multicasting.

One of the more intriguing developments in the past year was the addition of OTA distribution for Oxygen, a cable network founded more than 20 years ago. Could additional cable networks follow?

The Multicast Landscape

SCRIPPS NETWORKS	Bounce	Grit	Laff	Court TV	ion Mystery	**Defy TV**	**Scripps News**
Weigel Broadcasting Co	MeTV	Movies	H&I Heroes & Icons	Decades	start tv	**Story Television**	
Sinclair Broadcast Group	Comet	Charge!	TBD.	Stadium	**MeTV+**		
Nexstar Broadcasting Group, Inc.	Antenna TV	**Rewind TV**					
gray	circle						
TEGNA	True Crime Network	Quest	**twist**				
CBS Media Ventures	Dabl	**Fave TV**					
NBCUniversal	Cozi TV	LX	**Oxygen True Crime**				
AMB Allen Media Broadcasting	this tv	**theGrio**					
Get After It Media	Rev'n	Action The Action Channel	heartland	retro tv	fam The Family Channel		
Other	getTV	SportsGrid	QVC	HSN	**Fox Weather**		

= *Network launched OTA within past two years.*

Antenna Adoption: A Closer Look

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Interest in purchasing an antenna remains notable, with half of consumers considering buying one in the next year.

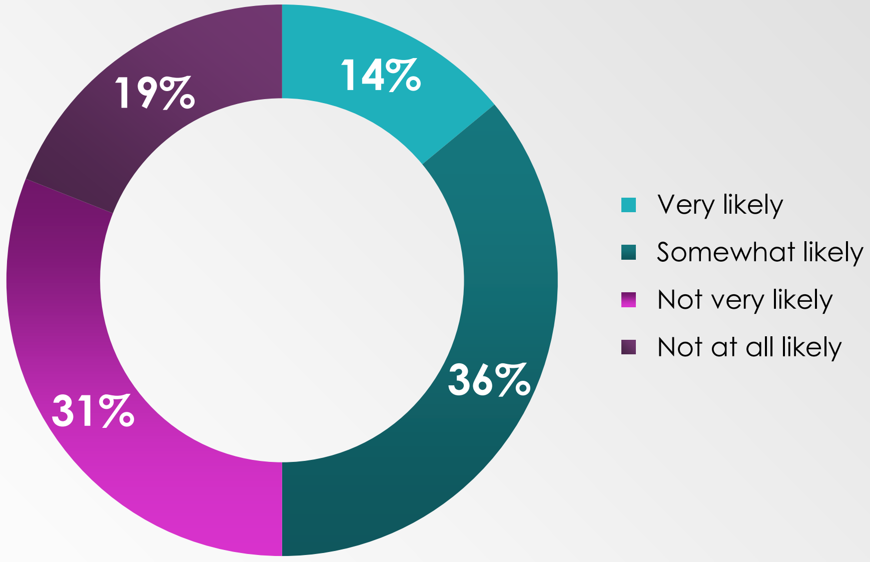
Interest is particularly high among current antenna users. Two-thirds are considering purchasing a new one in the next year – either to replace one that they have or to install in an additional room in the home.

Current owners express an interest in adding an additional digital antenna due to its easy setup and ability to further expand access to channels.

Non-owners, meanwhile, are driven to purchase an antenna as an escape from monthly subscriptions.

Overall audience:

Antenna purchase intent in the next year



Reasons for Adding a Digital Antenna	TOTAL
Doesn't require a monthly subscription	54%
Provides me additional channels to watch	42%
Easy to set up and use	36%
Helps me reduce or eliminate cable/satellite fees	32%

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S18H. How likely are you to buy a new digital antenna in the next year? (n=2000) Source: S14e. What are your main reasons for thinking about adding a digital TV antenna to your current TV watching?

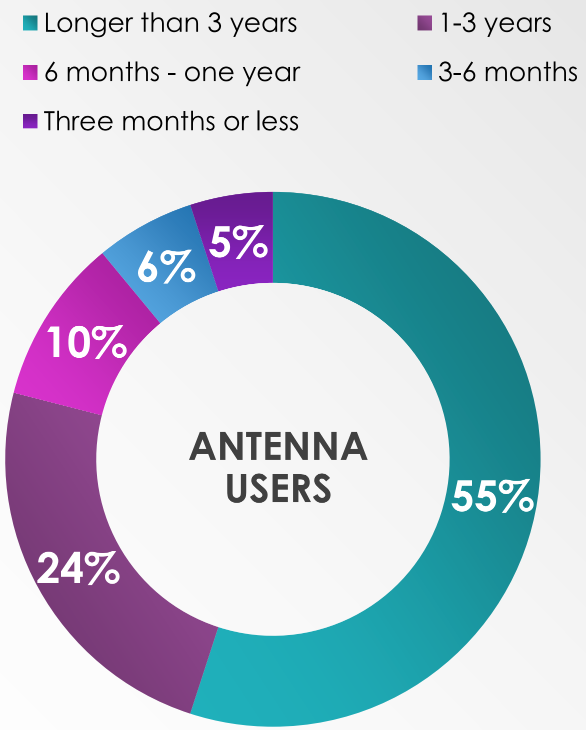
Long-term users (3+ years) continue to make up the majority of current over-the-air antenna users.

However, nearly one-in-five are recent adopters, having purchased their antenna in the past year.

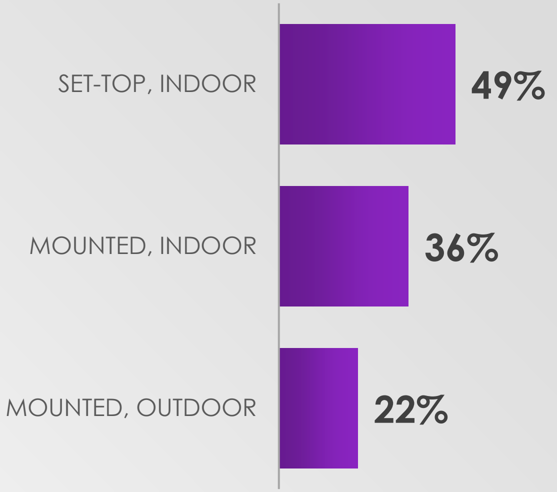
Indoor antennas remain dominant within the market, with set-top models more common than wall or window-mounted units.

Outdoor antennas continue to be less common even though they generally can receive more distant signals.

Antenna users:
Antenna usage duration



Type(s) of antenna currently owned

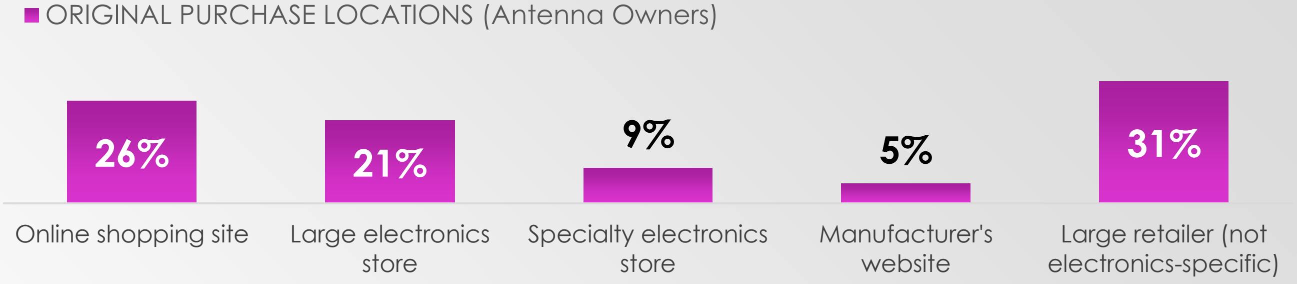


Source: S18a. How long have you been using over-the-air antennas to watch TV for free? Base: Antenna users (N=402)
Source: S17a. What type(s) of digital antenna do you own?

Current antenna users purchased their units at a diverse mix of locations including online shopping sites and brick-and-mortar outlets such as large electronics stores and big box retailers.

Prior to purchase, websites, word-of-mouth and advertising were the top sources of information consumers used to research antennas.

Purchase location and sources of information



Sources of Information	Antenna Owners
Visited websites that provide recommendations for the best antenna to buy based on your needs or area	32%
Solicited advice from a friend, co-worker, or family member	24%
Saw an advertisement about a specific brand/type of antenna	21%
Read the benefits listed on the packaging antennas come in	20%
Read an article about antennas	19%
Talked to an expert on antennas at a store that sells antennas	17%
Chatted with an expert about antennas through a website	7%
Read a brochure that's handed out at a supermarket, electronics store, or other retailer that has advice about buying an antenna	6%
Called a hotline with representatives knowledgeable about antennas	5%

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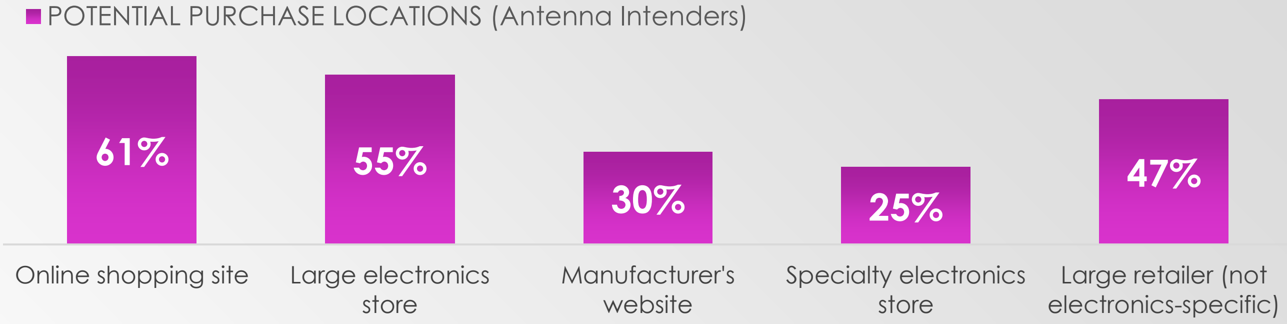
Source: S18e. Where did you buy it? S18d. How did you learn about the type or model of antenna to buy? Base: Antenna owners (N=848)

Potential antenna buyers remain open to a variety of purchase venues, led by online shopping sites and large electronics stores.

Websites and product packaging continue to stand out as top options for consumers to learn about antennas. The advice of in-store experts also becomes slightly more valuable as consumers become more comfortable with in-store shopping.

However, word-of-mouth remains a strong contributing source for purchase information.

Planned purchase locations and sources of information



Sources of Information	Intend to buy an Antenna
Visit websites that provide recommendations for the best antenna to buy based on your needs or area	66%
Read the features and benefits listed on the packaging antennas are sold in	49%
Talk to an expert on antennas at a store that sells them	40%
Solicit advice from a friend, co-worker, or family member	30%
Chat with an expert about antennas through a website	22%
Read a brochure that's handed out at a supermarket, electronics store, or other retailer that has advice about buying an antenna	18%
Call a hotline with representatives knowledgeable about antennas	11%
Something else	2%

Source: S18j. Where would you likely shop if you decided to purchase a digital antenna? S18i. Prior to purchasing a new digital antenna, what actions are you likely to take when deciding on which antenna to buy? Base: Antenna intenders (N=1007)

Consumers continue to show interest in advancing over-the-air technology, including “smart antennas” and ATSC 3.0 or NextGen TV.

Interoperability with home wi-fi and a clearer picture are leading priorities.

Other “nice to have” features include audio improvements and searchable, on-screen guides.

Emergency alerts and personalization features, while still having strong interest, remain lower on the priority list for consumers.

For consumers who currently have an antenna, finding an antenna ready-built into a TV set sparks the greatest interest.

Interest in advanced antenna features

Top 2 Box	TOTAL
Connects to your home’s wi-fi so you can watch over-the-air channels on any internet-connected TV set or computer	75%
Able to skip commercials for shows you record	75%
A clearer picture that enables NextGen hi-def viewing on a 4K TV set	71%
Improved audio, including Dolby and 5.1 Surround Sound support, and better background noise separation	68%
Ability to stream shows you record using your phone, tablet, or computer even if you are away from home	68%
An on-screen program guide with searchable listings that includes over-the-air networks & programs	68%
Antenna is already built into a TV set that you purchase	67%
Able to record programs with a built-in DVR that has nearly unlimited storage space	64%
Ability to personalize recommendations based on your preferences and viewing history	60%
Emergency alerts targeted to your immediate area	60%

Source: S18G. How interested are you in the following? Base: N=2000

Appendix

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Methodology

The quantitative survey was fielded in December 2022-January 2023 to understand the variety of ways consumers are currently accessing TV content; how TV viewers are using self-serve bundling of networks and services to build optimal TV packages; profiling antenna purchasers and users; and why free over-the-air television is enjoying a resurgence as an entertainment value proposition.

All respondents met the following qualifications:

- N=2000
- 50%/50% Male/Female
- Age 33% A18-34 / 33% A35-49 / 33% A50-64
- Diverse Recruit: 50% White/Caucasian; 20% Black/AfAm; 20% Hispanic (English dominant); 10% Asian American & Other
- Nested age/gender/ethnicity quotas
- No sensitive industries
- Must watch 3+ hours of TV per week (on any platform)
- 50% Cord-cutters/cord-nevers

Glossary

Definition of terms used

Ad-supported streaming services – Platforms that provide the ability to watch programming at no cost in exchange for watching ads. This can include AVOD (e.g., on-demand content) and FAST services (e.g., streamed channels). Many platforms now offer both.

AVOD – Ad-supported video-on-demand services like The Roku Channel, YouTube and others.

Cord-cutter – Someone who has cancelled their legacy TV provider (cable/satellite/telco) in favor of using on over the top (OTT) video services

Cord-never – A consumer who has never subscribed to cable, satellite or telco TV service as an adult.

Digital Media Player (DMP) – includes devices like Amazon Fire or Apple TV.

Free Ad-Supported Streaming Television (FAST) – A service that offers pre-programmed video channels at no cost to the viewer in exchange for watching ads during pre-scheduled breaks. Examples include Freevee, Pluto TV, Samsung TV Plus, Vizio Watch Free+, and others.

Internet TV User – any subscription services that provide live TV access.

OTA – Traditional or multicast TV network that is available "over-the-sir" and can be watched on an antenna.

SVOD – Subscription video-on-demand services like Netflix & Disney+.

Antenna users

5.3	2.9
Avg. # subscription services (vs. 5.2 overall)	Avg. # free streaming services (vs. 2.7 overall)

Life stage

44.2	33%
(42.0)	(36%)
Median age	Parents

Education

66%	34%
(68%)	(32%)
Some college	No college

Gender

51%	49%
(49%)	(50%)
Male	Female

Race/Ethnicity

67%	21%	23%
(66%)	(21%)	(21%)
White	Black	Hispanic

Community

33%	43%	24%
(33%)	(45%)	(22%)
Urban	Suburban	Rural

Employment

47%	13%	$47,500
(48%)	(12%)	($47,500)
Full time	Part time	Average income

Most important feature in TV service bundle	
Is free or very low cost	41% (32%)
Access to live channels	16% (15%)
Must-have content in bundle	
Free broadcast networks	77% (64%)
Subscription streaming services (SVOD)	45% (56%)

Values in parentheses indicate Total for comparison
N=402 digital antenna users

Pay TV subscribers

5.3	2.9
Avg. # subscription services (vs. 5.2 overall)	Avg. # free streaming services (vs. 2.7 overall)

Life stage

43.1	36%
(42.0)	(36%)
Median age	Parents

Education

70%	30%
(68%)	(32%)
Some college	No college

Gender

56%	43%
(49%)	(50%)
Male	Female

Race/Ethnicity

63%	23%	21%
(66%)	(21%)	(21%)
White	Black	Hispanic

Community

36%	45%	19%
(33%)	(45%)	(22%)
Urban	Suburban	Rural

Employment

55%	10%	$57,500
(48%)	(12%)	($47,500)
Full time	Part time	Average income

Most important feature in TV service bundle

Is free or very low cost	25% (32%)
Access to live channels	20% (15%)

Must-have content in bundle

Free broadcast networks	69% (64%)
Subscription streaming services (SVOD)	50% (56%)

screen engine/asi

Values in parentheses indicate Total for comparison
N=1,000 cable, satellite, or telco subscribers

Cord Cutters / Nevers

5.0	2.7
Avg. # subscription services (vs. 5.2 overall)	Avg. # free streaming services (vs. 2.7 overall)

Life stage

40.8	36%
(42.0)	(36%)
Median age	Parents

Education

65%	35%
(68%)	(32%)
Some college	No college

Gender

41%	57%
(49%)	(50%)
Male	Female

Race/Ethnicity

69%	19%	22%
(66%)	(21%)	(21%)
White	Black	Hispanic

Community

30%	45%	25%
(33%)	(45%)	(22%)
Urban	Suburban	Rural

Employment

41%	15%	$40,000
(48%)	(12%)	($47,500)
Full time	Part time	Average income

Most important feature in TV service bundle

Is free or very low cost	39% (32%)
Access to live channels	10% (15%)

Must-have content in bundle

Free broadcast networks	59% (64%)
Subscription streaming services (SVOD)	62% (56%)

screen engine/asi

Values in parentheses indicate Total for comparison
N=1,000 cord cutters/cord nevers

Ad-Supported Streamers

6.0	2.7
Avg. # subscription services (vs. 5.2 overall)	Avg. # free streaming services (vs. 2.7 overall)

Life stage

42.2	37%
(42.0)	(36%)
Median age	Parents

Education

66%	34%
(68%)	(32%)
Some college	No college

Gender

49%	50%
(49%)	(50%)
Male	Female

Race/Ethnicity

65%	23%	22%
(66%)	(21%)	(21%)
White	Black	Hispanic

Community

35%	40%	24%
(33%)	(45%)	(22%)
Urban	Suburban	Rural

Employment

44%	13%	$40,000
(48%)	(12%)	($47,500)
Full time	Part time	Average income

Most important feature in TV service bundle	
Is free or very low cost	36% (32%)
Access to live channels	14% (15%)
Must-have content in bundle	
Free broadcast networks	66% (64%)
Subscription streaming services (SVOD)	60% (56%)

screen engine/asi

Values in parentheses indicate Total for comparison
N=734 users of AVOD and/or FAST services