

# TV subscriptions and licence fees



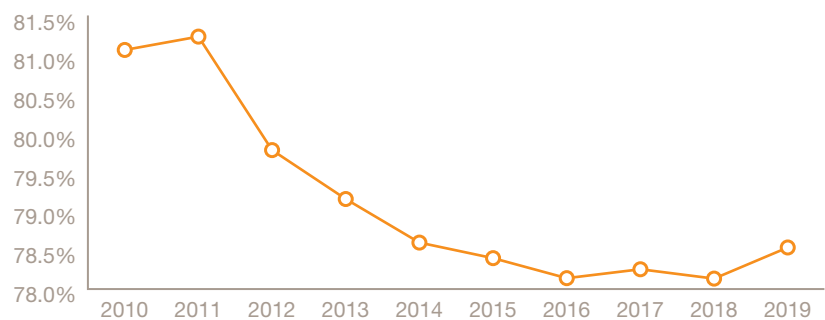
Key insights at a glance

# 5

*TV and video consumption patterns are changing.* The public is demanding high-quality original programming, available in a flexible, on-demand manner across numerous devices to satisfy the growing phenomenon of “binge viewing”, and OTT services offer the best outlet for this type of consumption. The move towards such services helps to explain why North American subscription TV penetration is expected to fall from 79.8% in 2012 to 78.1% in 2016.

**Fig. 5a: Subscription TV suffers as OTT providers please consumers**

North American subscription TV penetration (%), 2010–2019



Source: Global entertainment and media outlook 2015–2019, PwC, Ovum

*Outlook insights: an analysis of the Global entertainment and media outlook 2015–2019*

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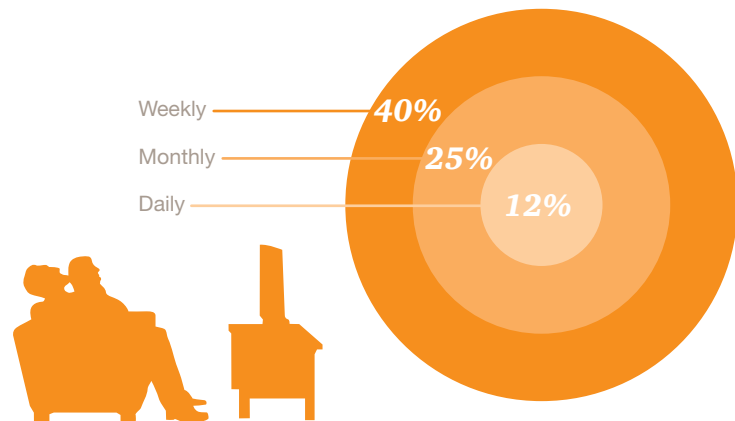
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**Fig. 5b: Video content & social dynamics**

Binge viewing is socially accepted—and encouraged.



Binge viewership, ages 18–24

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