



Cord Cutters

Cord Shavers

Cord Nevers

2017

22.2

million U.S. adults

**cut the cord on pay TV services,
like cable or satellite,
in favor of online streaming or
over-the-air TV**



33%

**Jump from the
16.7 million who left
in 2016**



The truth about cord-cutting

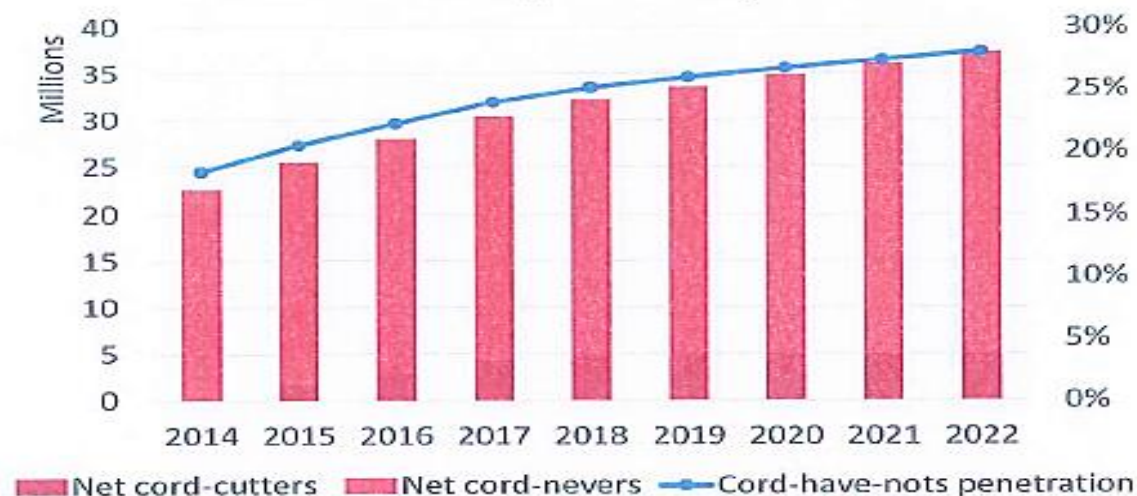
Only 5mn will “cut the cord”...

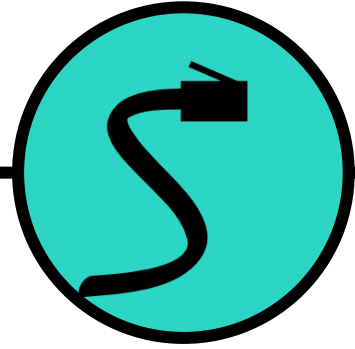
US, pay-TV subscriptions and household penetration, 2014-2022



...but 32mn will never sign up at all

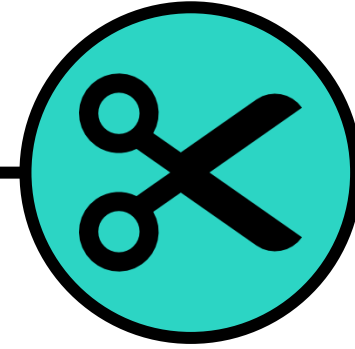
US, net cord-cutter and cord-never households and cord-have-not penetration, 2014-2022





Cord Nevers

TV viewers who have never
paid for a traditional TV
connection



Cord Cutters

Viewers who had and
then eliminated standard
TV subscriptions

Cord nevers generation

“We are now well beyond the cord-cutting. Now the industry is beginning to understand that we have raised an entire generation of ‘cord-nevers’ – those refusing to enter the traditional pay TV world in the first place. Most are millennials (so-called ‘digital natives’) who can’t even comprehend a world with no broadband internet and smart phone-driven premium video”.

Peter Csathy, media & technology advisor

Over half (52%)

of

Cord Nevers are Millennials

(ages 18 to 34)

compared to just 35% of Cord Cutters



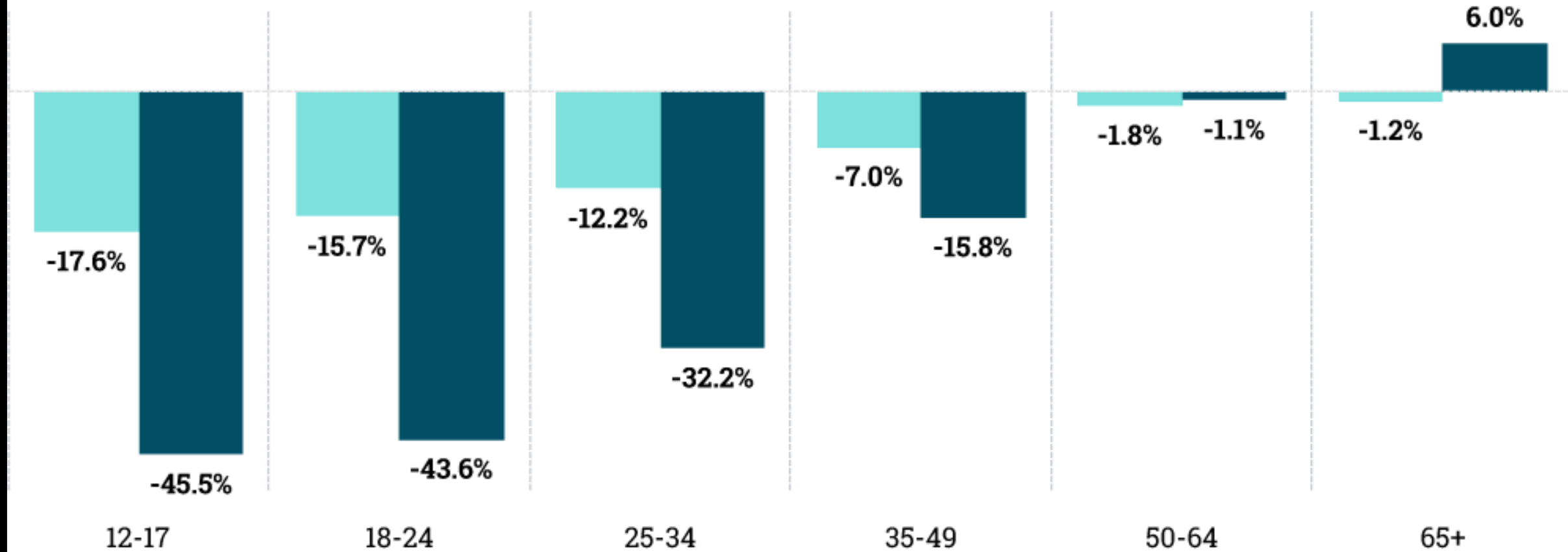
Cord Nevers
are **34** years old on average
and represent 9% of all US
consumers

Cord cutters
are **43** years old on average and
represent 8% of all US consumers



Traditional TV Viewing Trends, by Age Group in Q2 2017

■ % change in weekly hours, year-over-year
■ % change in weekly hours over 5 years

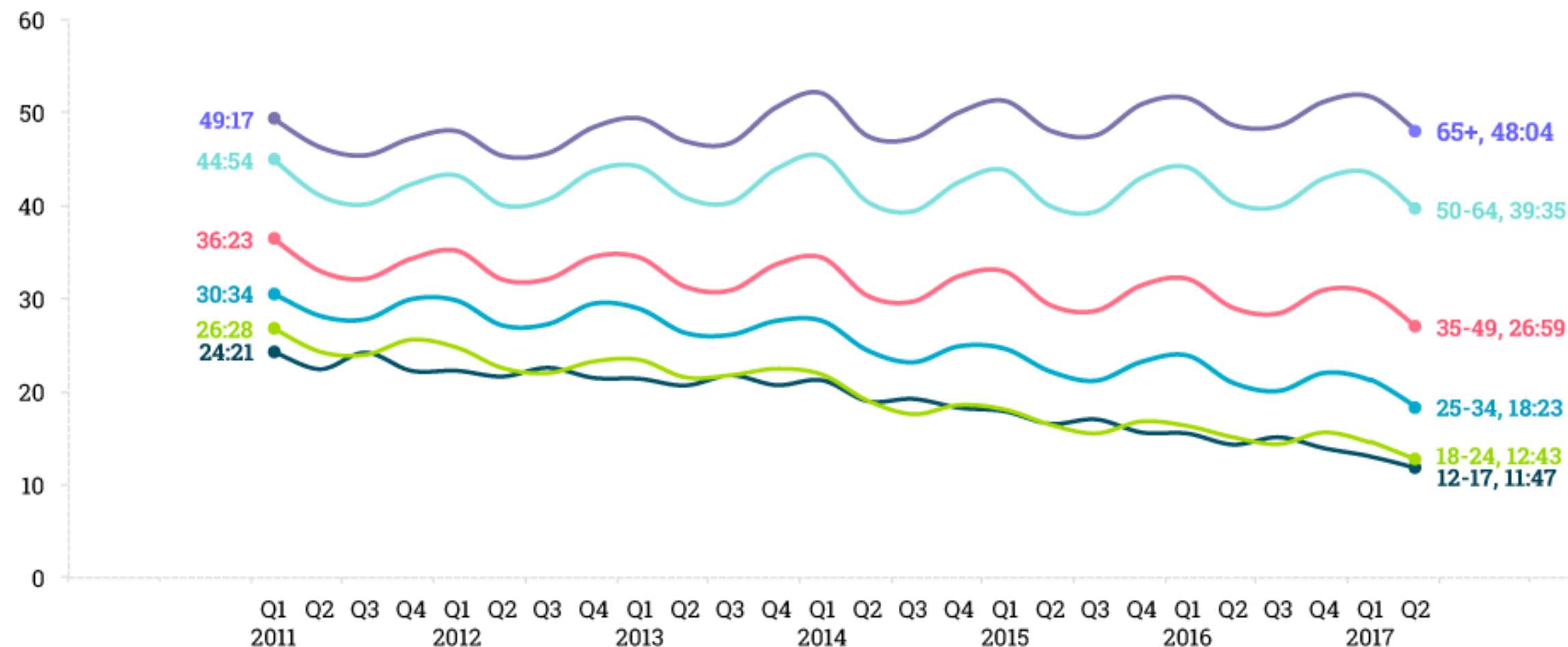


Published on MarketingCharts.com in December 2017 | Data Source: MarketingCharts.com analysis of Nielsen data

**Traditional TV refers to all live + DVR/time-shifted TV viewing during the quarter for the total population
In Q2 2017, live viewing averaged 24:26 per week for the 2+ population and DVR/time-shifted TV 3:18 per week.*

Traditional TV* Viewing Trends, by Age Group

Q1 2011 - Q2 2017 (weekly hh:mm)



Published on MarketingCharts.com in December 2017 | Data Source: MarketingCharts.com analysis of Nielsen data

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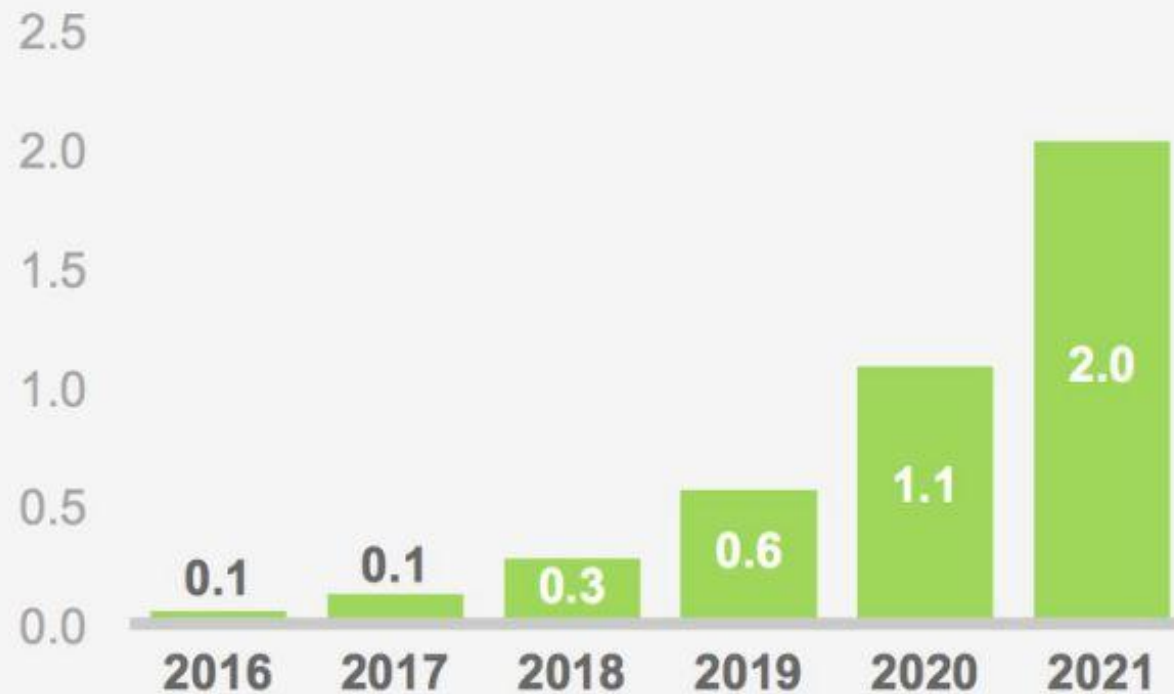
**29% of Nevers
say that TV is “anything (they) can view on any
device”**

(including a smartphone or tablet)

High Growth for Live Video on Mobile

Live Video to Grow 39-Fold by 2021, 5% of Mobile Video Traffic

Exabytes
per Month



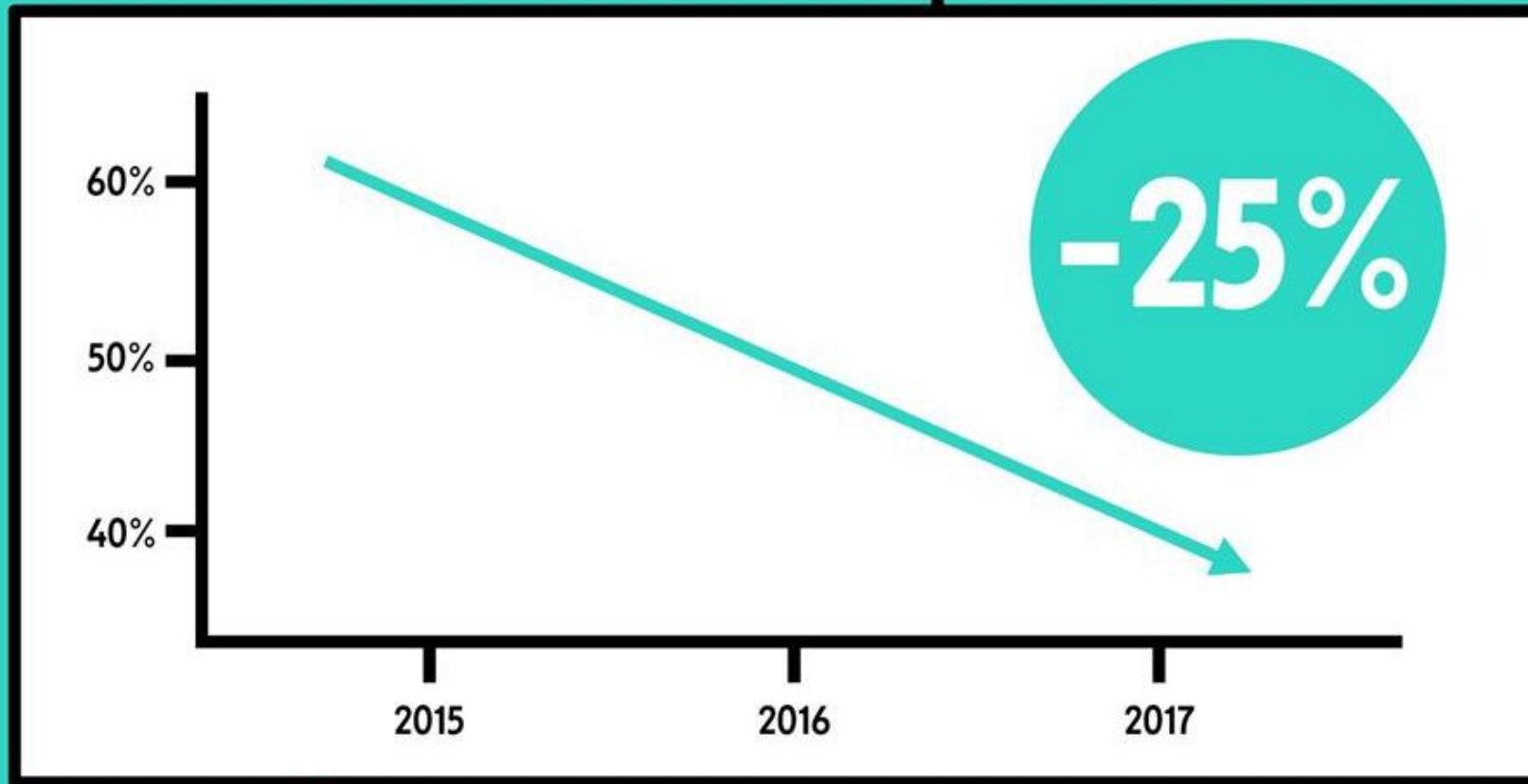
108% CAGR
2016–2021

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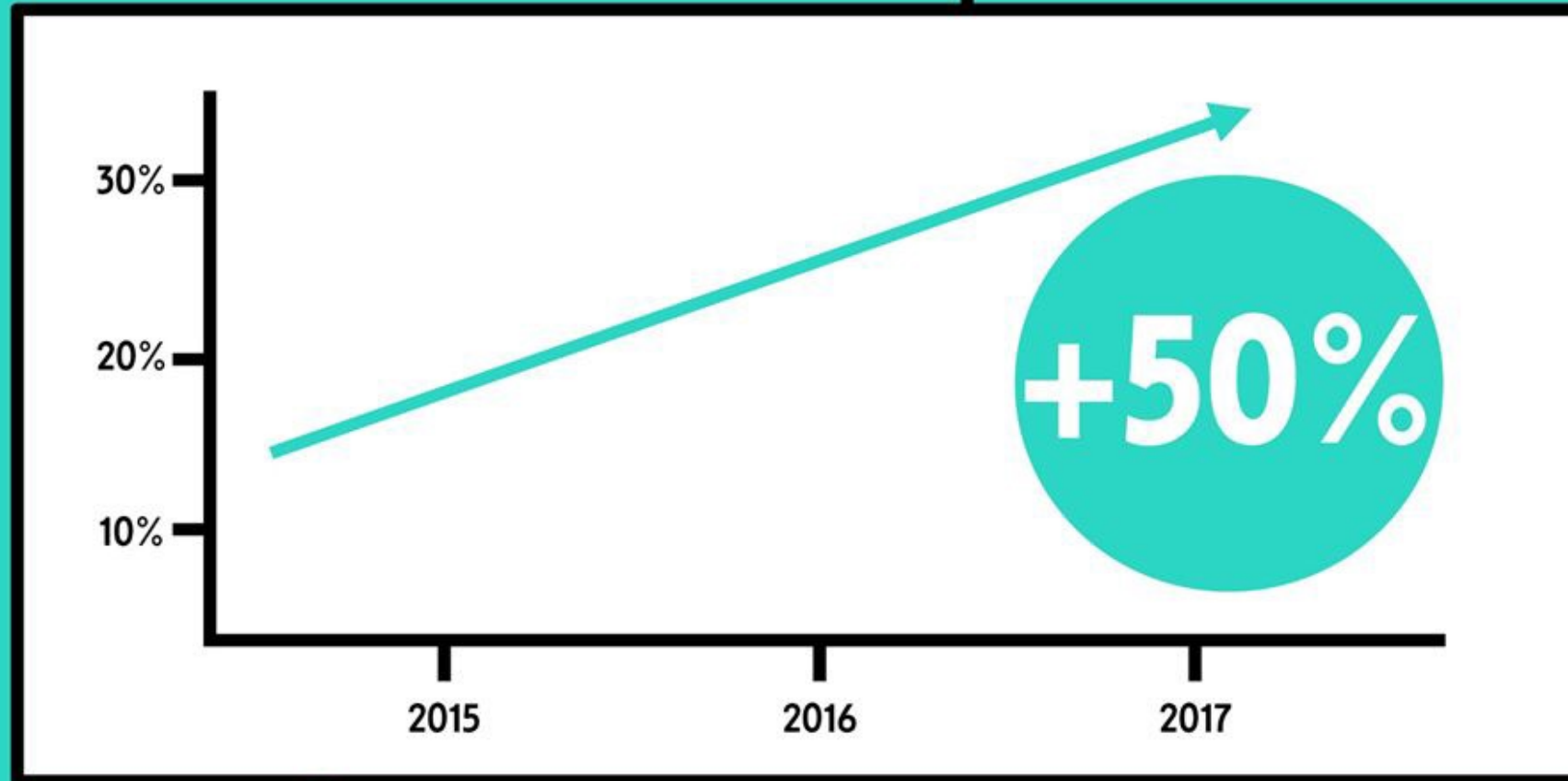
* Figures (n) refer to 2016 and 2021 mobile data traffic shares

Source: Cisco VNI Global Mobile Data Traffic Forecast, 2016–2021

נטישת הכבלים והלווין

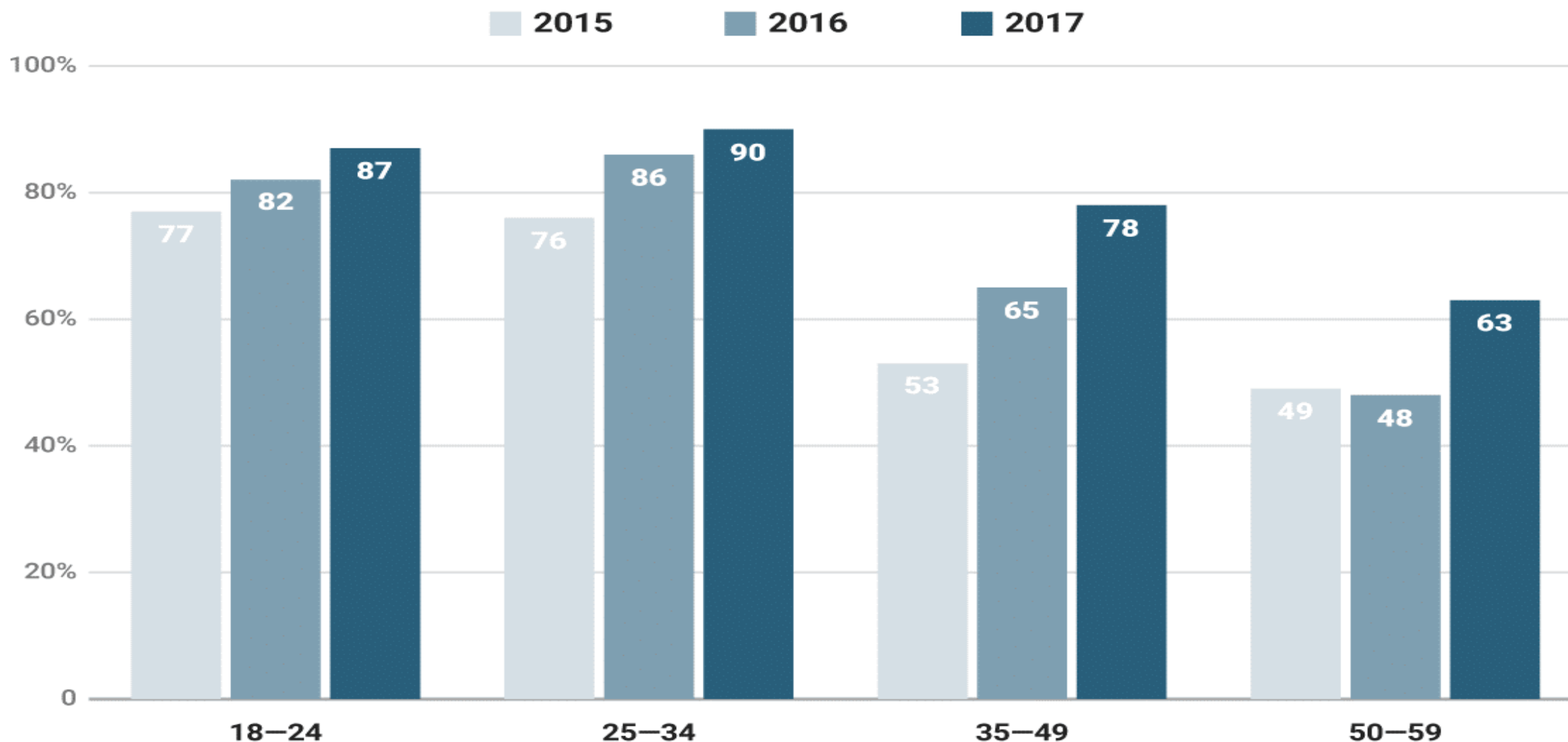


זינוק בהצטרפות לשירותי הטלוויזיה החדשים



THE RISE OF VIDEO STREAMING ACROSS ALL AGE GROUPS

Percentage of Americans who access TV content via the internet, by age group



SOURCE: PwC; Based on survey of ~2k Americans in 10/17 and in previous years

Streaming in the U.S. by Age Group



Source: *Consumer Intelligence Series: I Stream, You Stream,* PWC, October 2017.



Thank you