

Methodology



Overview

Public Opinion Strategies and David Binder Strategies conducted a mixed-mode national survey on behalf of the American Television Alliance

Timeline

The survey was conducted August 28-31, 2023

Audience

- The survey was conducted among N=800 adults (50% phone, 50% text-to-web interviews)
- The margin of error for a survey of N=800 is +3.46%

Research Team

Micah Roberts, Bill McInturff & Will Gudelunas were the principal researchers on this project. Gordon Price was the project director and Rob Frey provided analytical support.



Over 9 in 10 Americans say **cost is an important factor** when deciding to subscribe to video content.

Q: Next, I'm going to read you a list of things that could be considered when making the decision to subscribe to cable TV or a streaming platform for video content. For each, please tell me if it would be very important, somewhat important, not too important, or not at all important in YOUR decision to subscribe to cable TV or a streaming platform for video content. The (first/next) one is... (RANDOMIZE)

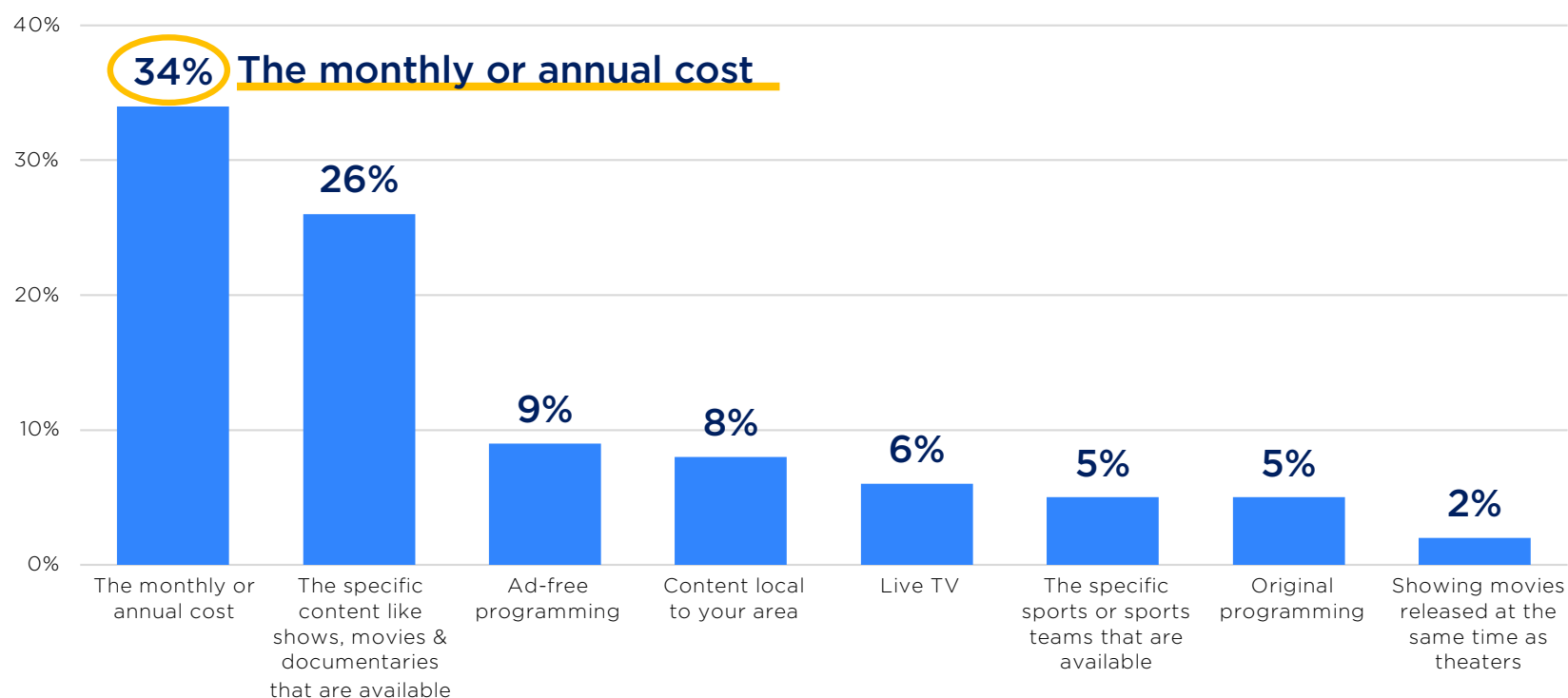
Over **2 in 3** Americans say **cost is a very important factor**

Ranked by % Very Important

	% VERY IMPORTANT	TOTAL IMPORTANT	TOTAL NOT IMPORTANT
The monthly or annual cost	68%	92%	8%
The specific content like shows, movies and documentaries that are available	46%	85%	15%
Ad-free programming	42%	74%	26%
Content local to your area	27%	62%	38%
Live TV	24%	56%	42%
The specific sports or sports teams that are available	24%	42%	58%
Original programming	20%	67%	31%
Showing movies released at the same time as theaters	14%	42%	58%

When deciding to subscribe to video content, **cost is the most important factor.**

Q: And which one of these was most important to you in making the decision to subscribe to cable TV or a streaming platform for video content? (RANDOMIZE)

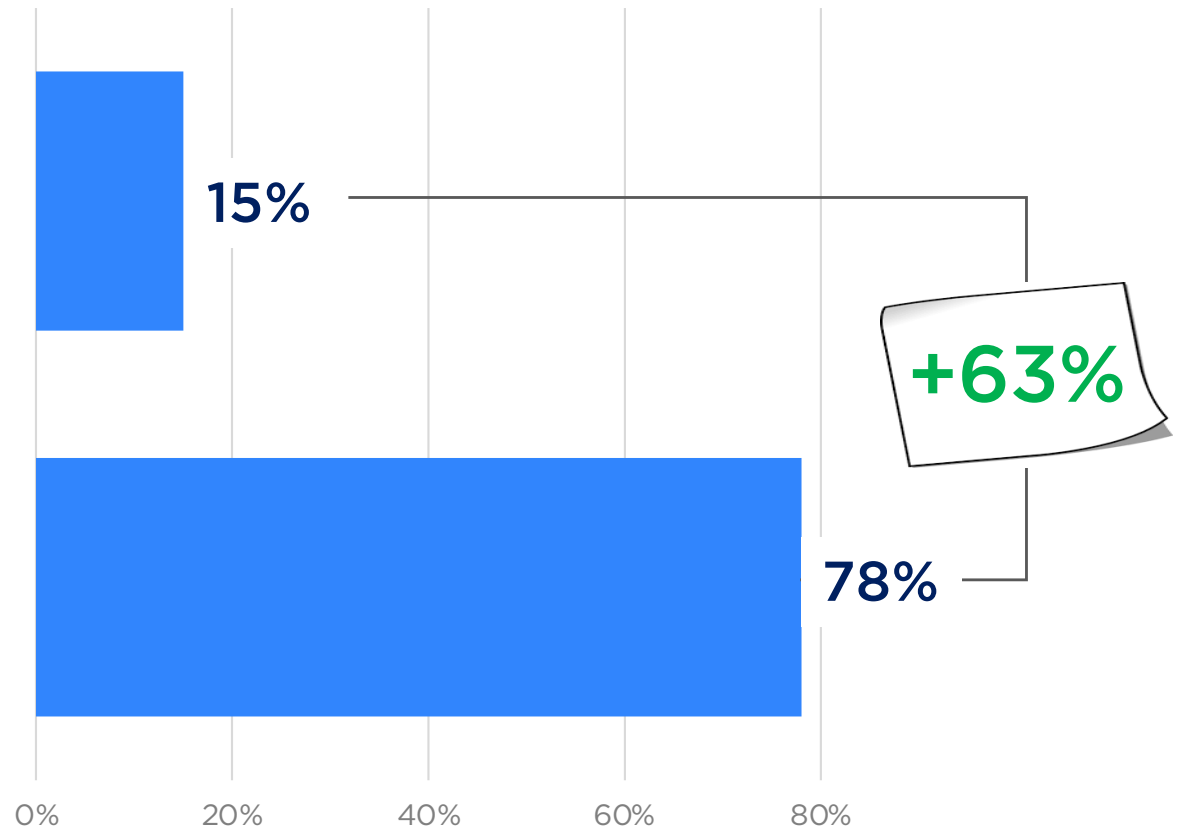


Americans overwhelmingly want **more choice** when it comes to **expensive news, sports, or movie channels**.

Q: Now, if you were subscribing to a cable television service today, which of these approaches would you prefer for adding expensive, specialty channels like news and premium sports or movie channels to the basic channels that everyone gets? (ROTATE)

An approach that provides a few different packages of these types of channels that are preselected, and each package has an additional cost with no ability to opt out of individual channels you do not want.

An approach that gives you the choice to opt out of these types of channels entirely or to add the channels you want individually, one-by-one, each for an additional cost.

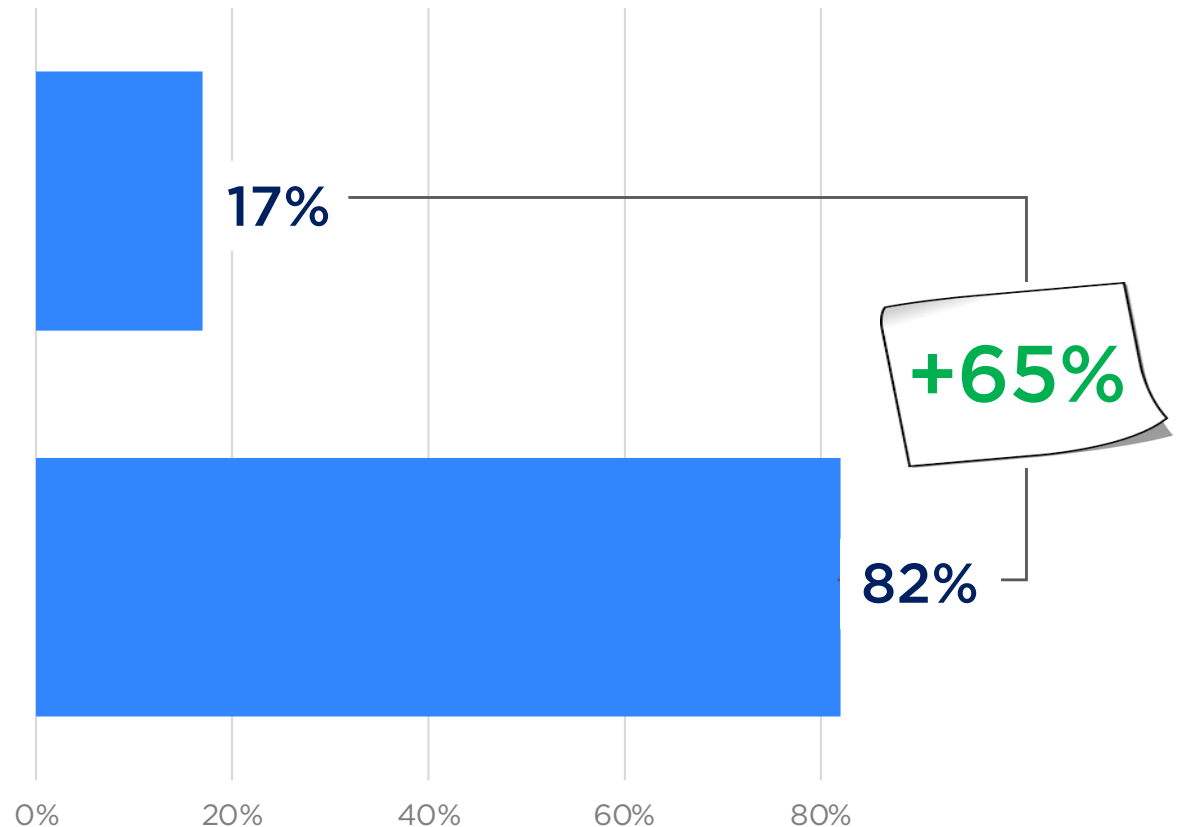


Sports channels are no exception when it comes to viewers' desire for **more choice over what they pay for.**

Q: Now, I'm going to read you two statements about cable television. Please tell me the one you agree with most.

Live sports has always been part of the basic channels subscribers get and should be included in basic cable plans – even if that means higher monthly bills for those who don't watch sports at all.

With the cost of everything going up, American families need MORE control over what they pay for. We should not be forced to foot the bill for sports content we are not interested in. We should be able to opt out of expensive channels – like those that show live sports – that we cannot afford or do not want.

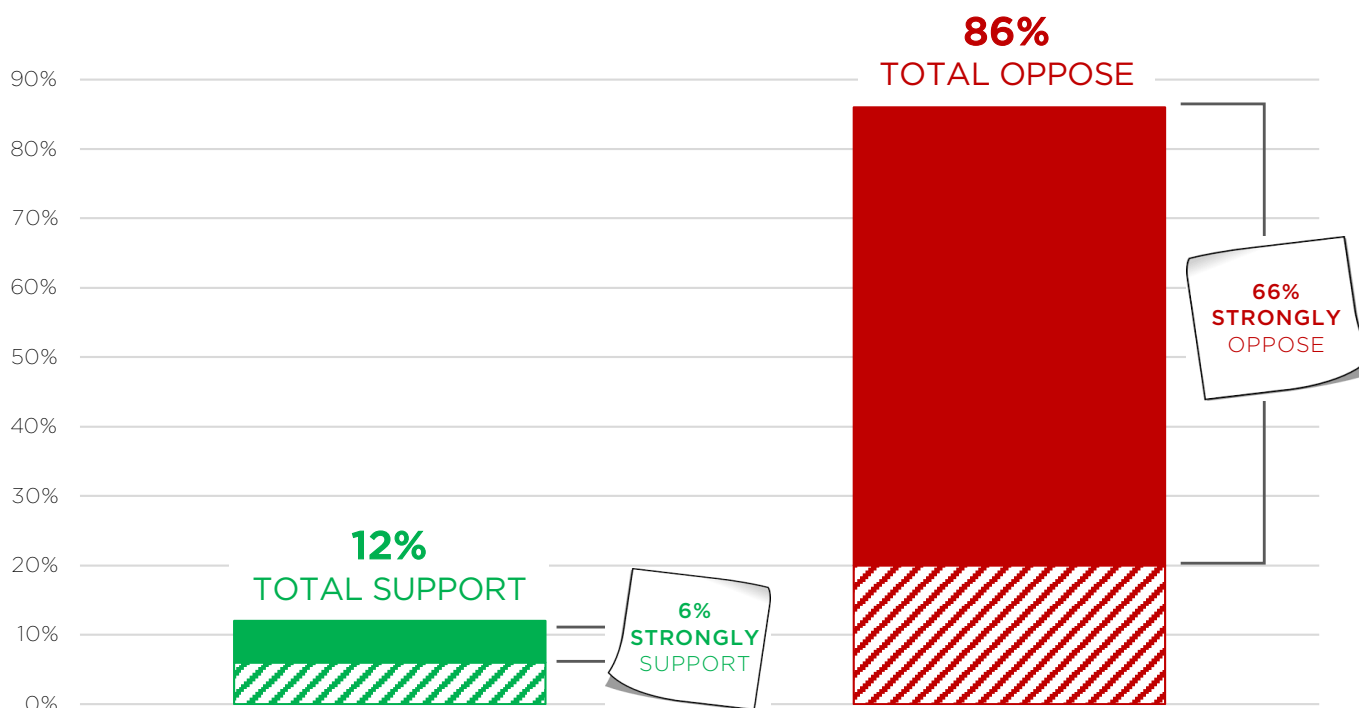


In fact, **majorities** of Americans **across all sub-groups** overwhelmingly agreed they want **more choice over what they pay for.**



86% of Americans **oppose** the position that cable companies must pay a fee for customers who choose not to buy ESPN.

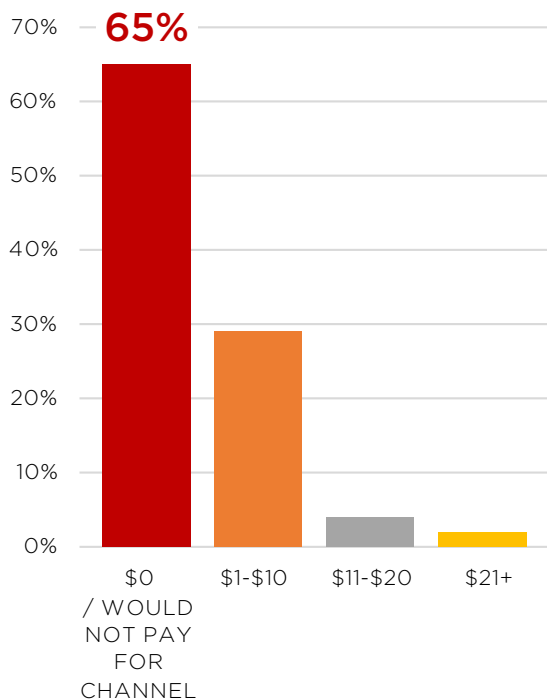
Q: Cable companies typically pay a fee to companies like ESPN based on the number of customers that buy the channel in their TV packages. But ESPN is taking the position that cable companies must pay a fee for customers who choose not to buy ESPN. This means that even those customers who choose not to buy ESPN will still see an increase in their monthly bills. Do you (ROTATE) support or oppose the position that cable companies must pay a fee for customers who choose not to buy ESPN? (IF SUPPORT/OPPOSE) And would you say you strongly or only somewhat (support/oppose) this position?



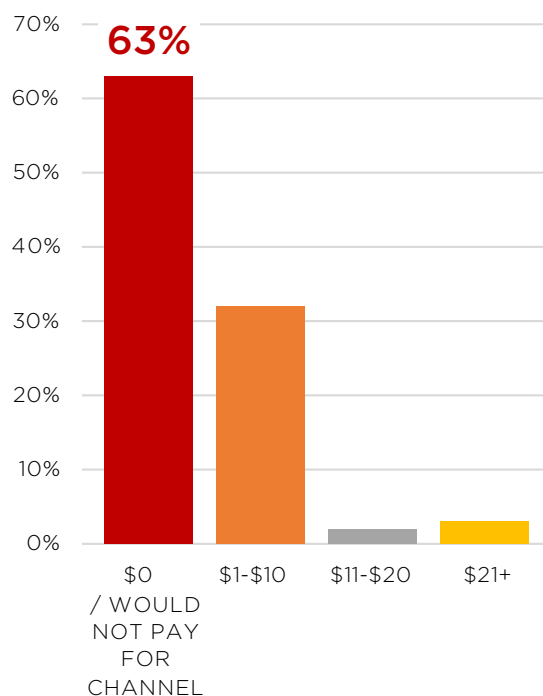
If it were possible, fully **65%** of adults would not pay for **ESPN** – with cable and broadcast news faring similarly.

Q: And if you did have the ability to select certain, more expensive specialty channels individually for an additional cost, how much per month would you be willing to pay for each of the following? The (first/next) one is.. ESPN; Individual cable news channels like CNN, the Fox News Channel, and MSNBC; Individual broadcast news channels like NBC news, ABC news, and CBS news (RANDOMIZE)

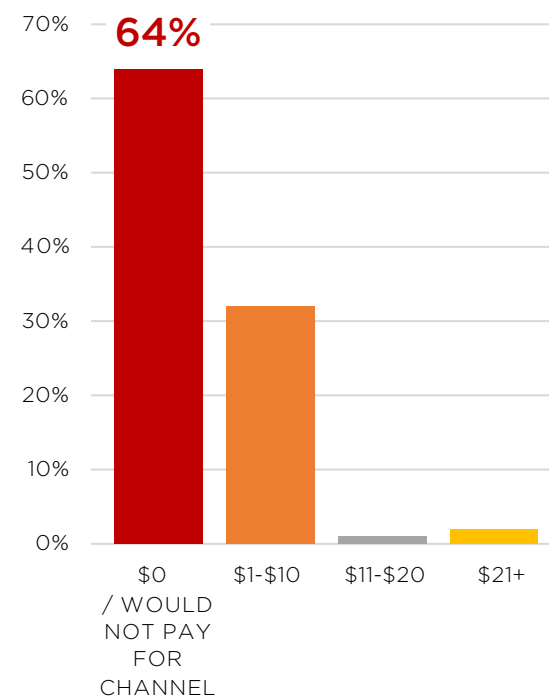
HOW MUCH/MONTH WOULD YOU BE WILLING TO PAY FOR **ESPN**?



HOW MUCH/MONTH WOULD YOU BE WILLING TO PAY FOR **CABLE NEWS**?



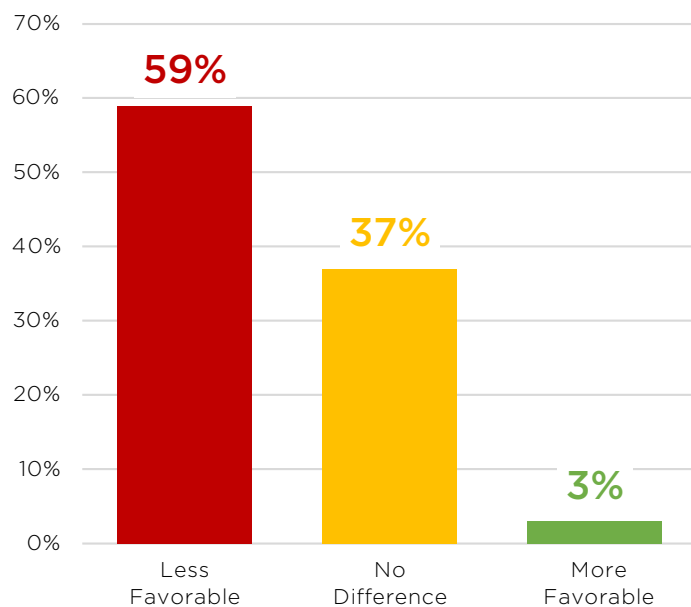
HOW MUCH/MONTH WOULD YOU BE WILLING TO PAY FOR **BROADCAST NEWS**?



74% of Americans say **ESPN has too much control** over sports programming.

Q: When ESPN cannot get their way in negotiations, they can take all their live sporting content off of the air so their channels go dark. This would happen with little notice and result in audiences not being able to view scheduled sports events. If this were to happen, would it make you feel (ROTATE) more or less favorable about ESPN, or would it make no difference in your opinion of ESPN?

ESPN NEGOTIATION TACTICS & FAVORABILITY



Q: Now having heard about this situation, would you say ESPN has too much control over sports programming, not enough control over sports programming, or about the right amount?

ESPN CONTROL OVER SPORTS PROGRAMMING

