

# United States Cord Cutters Report 2022

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Remote control: Changing media channels in the US

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Living Consumer Intelligence | [yougov.com/media-content](https://yougov.com/media-content)

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YouGov is an international research data and analytics group. Our products and services help the world's most recognized brands, media owners and agencies to explore, plan, activate, and track better marketing activities.

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# 1

# Overview

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## The world is **changing...**

Digital, as we know it today, now sits at the heart of enabling contactless experiences.

The risks and restrictions associated with in-person interactions, largely due to the pandemic, have meant we continue to see **day-to-day consumer routines dramatically impacted - from work to shopping, to entertainment and socializing, to engagement with different types of media.**



## ...and so are our consumption habits.

Globally, as some traditional media were hit by lockdown restrictions and changing work routines, many pre-pandemic digital media trends accelerated. We have witnessed a significant increase in the use of on demand TV streaming services such as **Netflix and Amazon Prime**, as well as the younger generations driving a rise in the popularity of podcasts.



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## Introduction

*"On a scale from 0 to 10, where 0 is not at all likely, and 10 is extremely likely. In the next 6 months, how likely, or unlikely, are you to cancel your cable subscription altogether?"*

**This report combines various YouGov data solutions to understand:**

- How Americans expect to consume media in the year ahead
- Which media channels are most likely to remain profitable
- Where to reach and engage the next generation of cord-cutters

Potential cord-cutters are defined as indicating their likelihood of canceling their cable subscriptions as 6+.

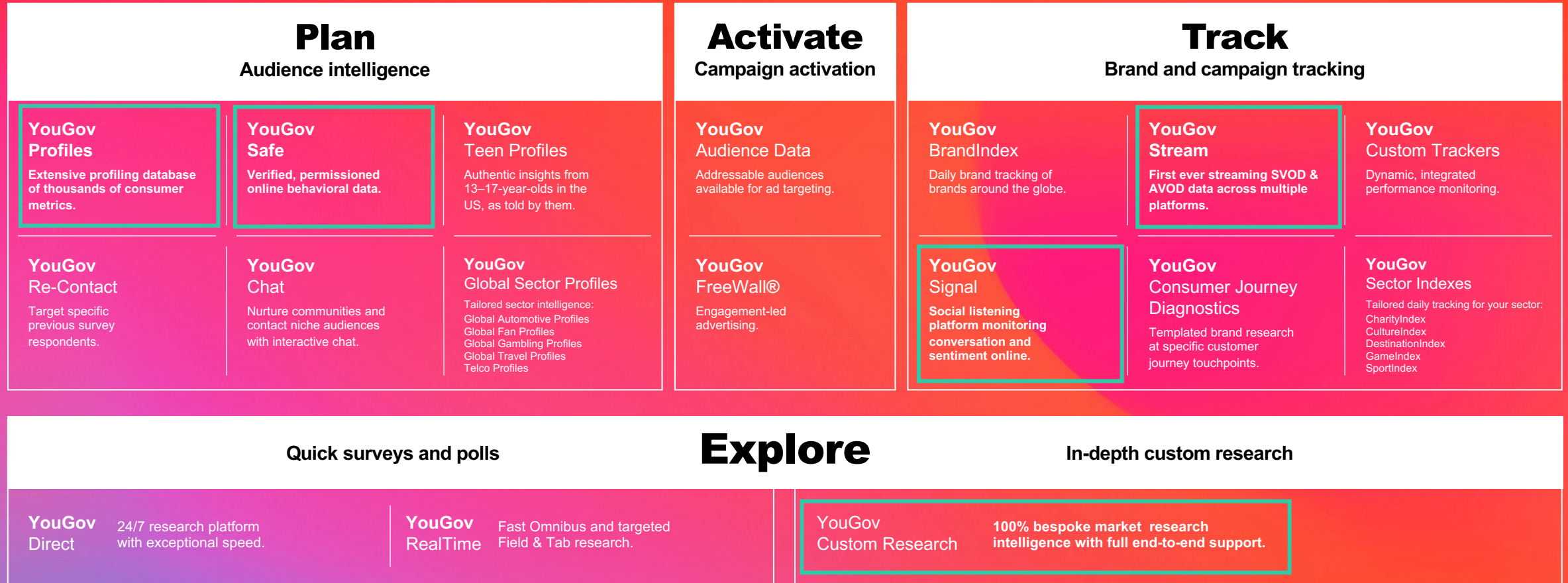
### **Potential cord-cutters**

Thinking of canceling in  
February 2022

### **Cord-nevers**

Streamers who never had  
cable in February 2022

# Living data underpins our broad suite of products



# 2

## Key Changes in Media Consumption

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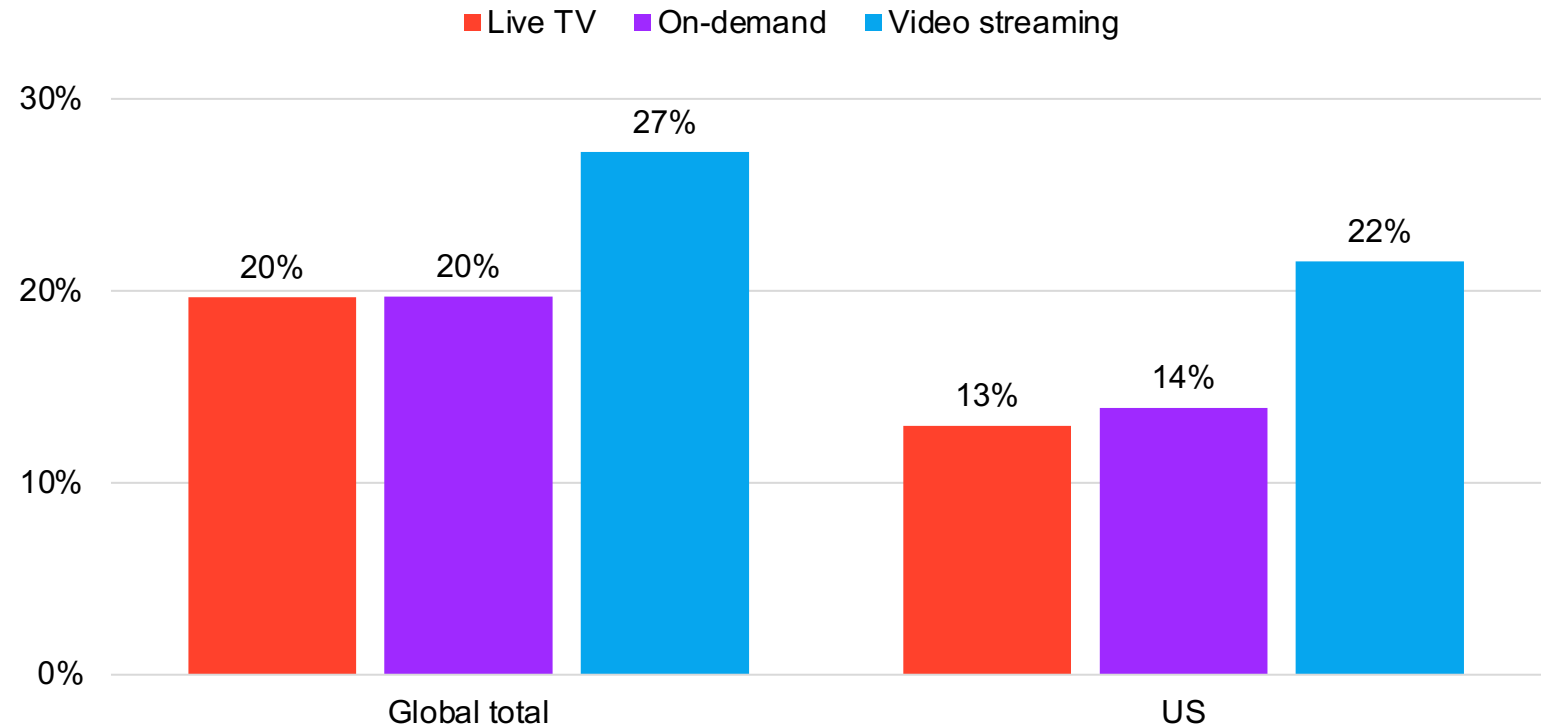
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[Download YouGov's Global  
Media Outlook Report 2022](#)



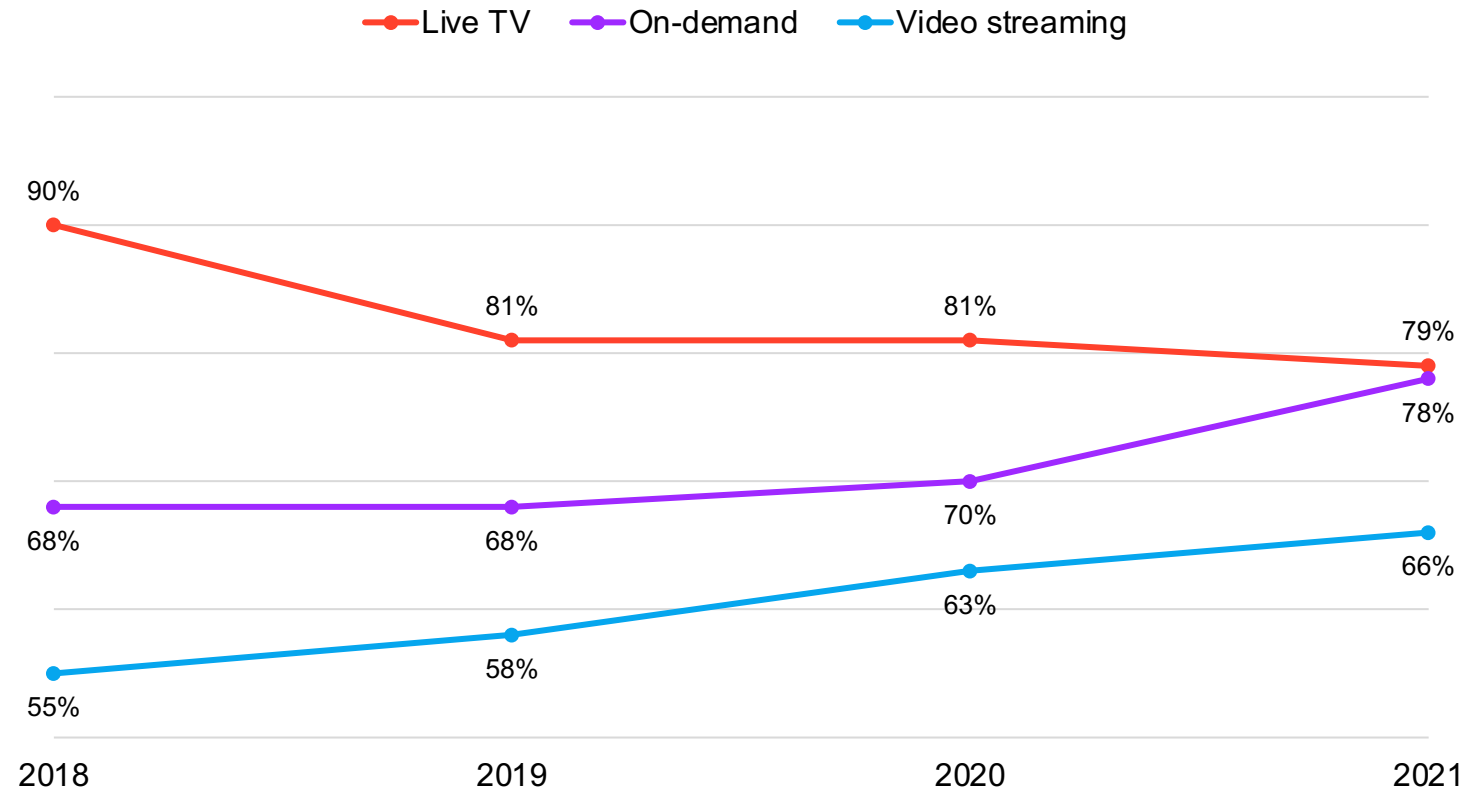
**The trend of declining live consumption and increases in on-demand and streaming has generated a loss of available impressions in the market and increase in media inflation.**

## Intention to increase usage (Global vs. US)



Q: Which, if any, of the following services do you use more in the next 12 months? Please select all that apply.  
YouGov Custom Research, November 2021

## Weekly TV Consumption (United States)

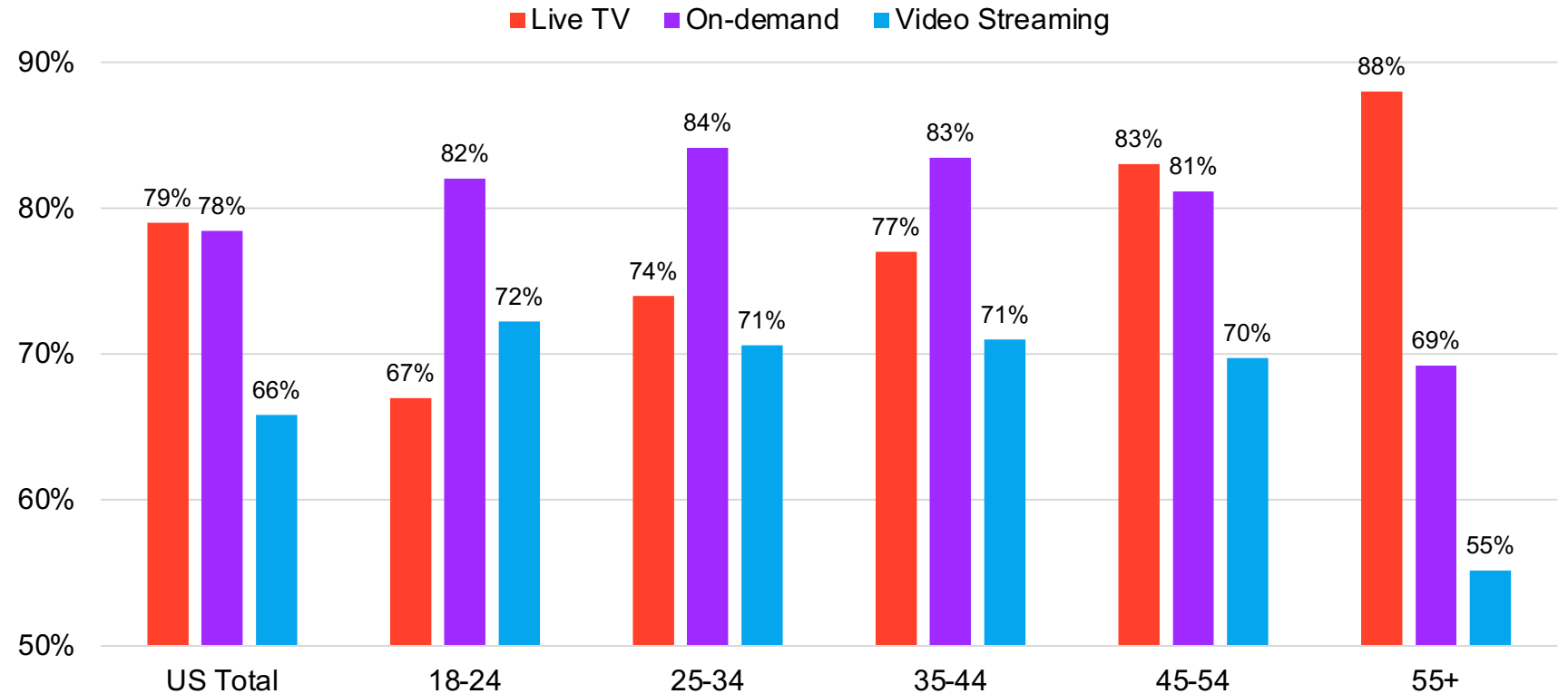


Q: Which, if any, of the following do you watch on a regular basis? (By regular we mean at least once a week). Please select all that apply.  
 YouGov Custom Research, November 2021

**Live television consumption has methodically decreased over the last four years, with the convenience of on-demand taking precedence in its place.**

**Live television consumption increases with age, with Gen Z being the lowest segment of regular live television viewers, and 55+ being the highest segment of regular television viewers.**

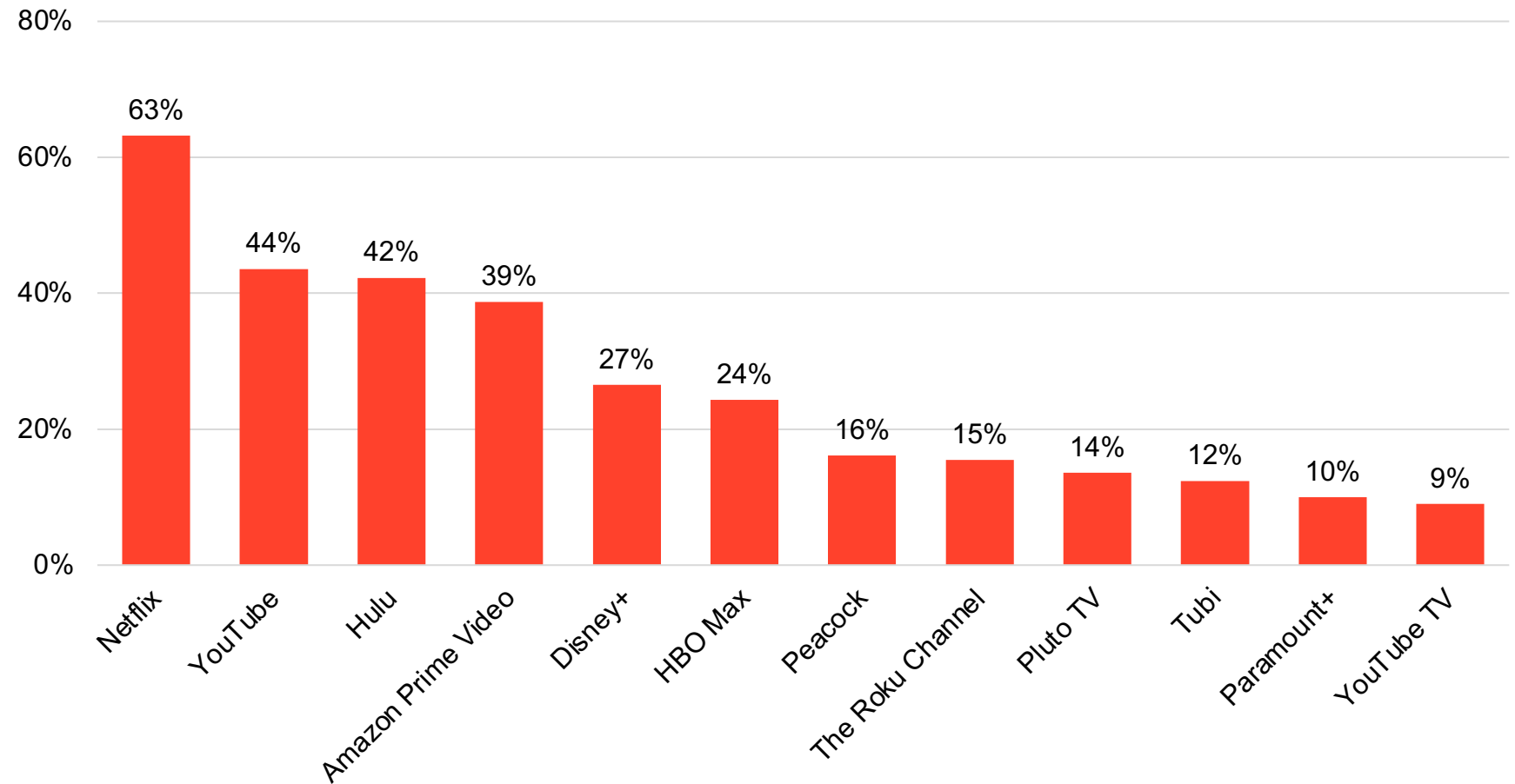
## TV consumption by age (US)



Q: Which, if any, of the following do you watch on a regular basis? (By regular we mean at least once a week). Please select all that apply.  
 YouGov Custom Research, November 2021

**While Netflix remains the most popular streaming service, with new entrants to the market including Disney+, the rebranded HBO Max, Peacock, and Paramount+, viewers have more alternatives.**

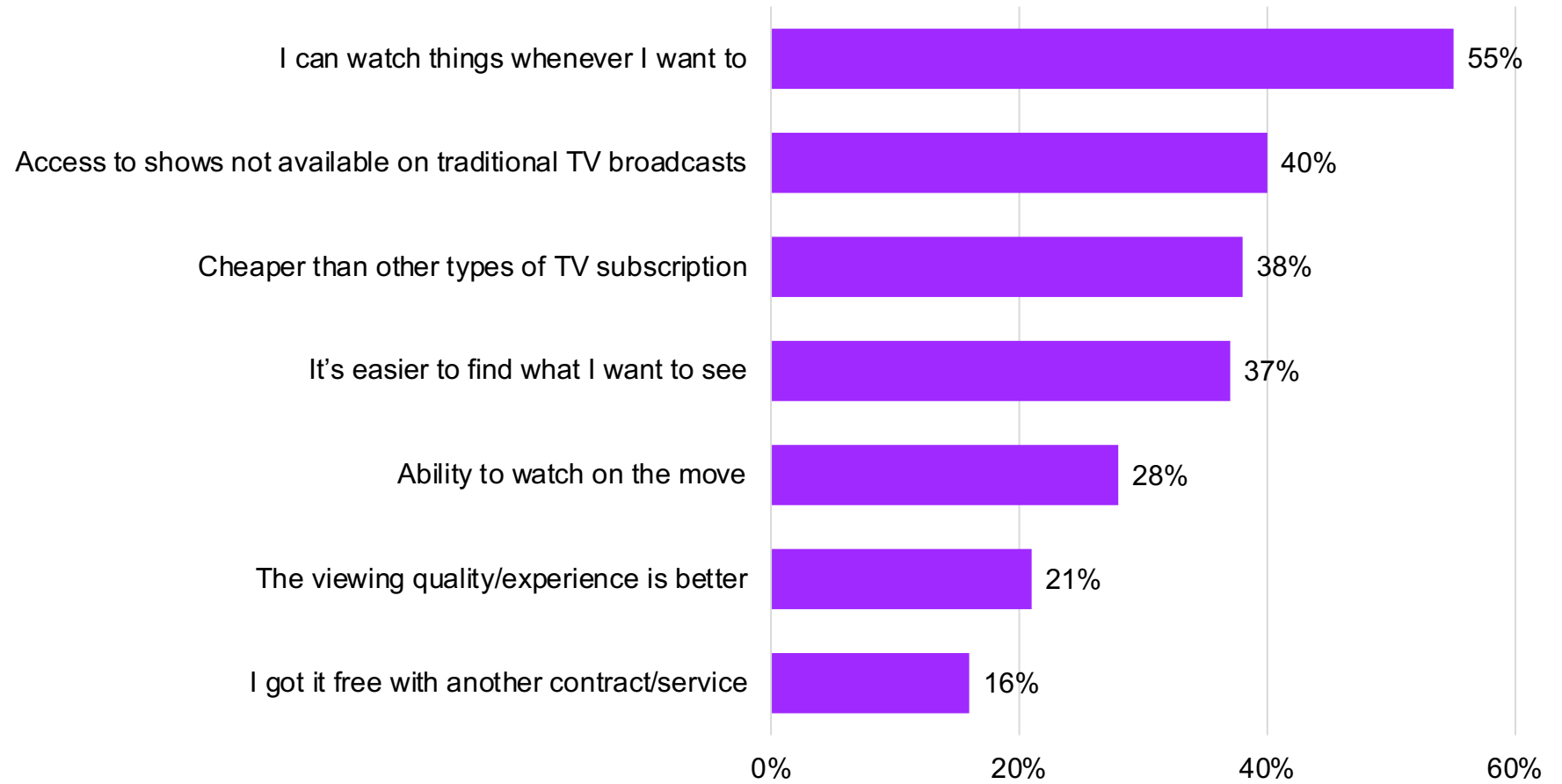
## OTT services used weekly (US)



Q: Which, if any, of the following streaming services/ platforms do you use on a regular basis, on any device?  
(By regular we mean at least once a week). Please select all that apply. *YouGov Custom Research, November 2021*

**The most common reason that people use streaming video platforms and services is for convenience, followed by access and cost.**

## Why US viewers use streaming video or platforms



Q: Which, if any, of the following are the main reasons why you use streaming services or platforms?  
YouGov Custom Research, November 2021

# 3

## Overview of Cord-cutting

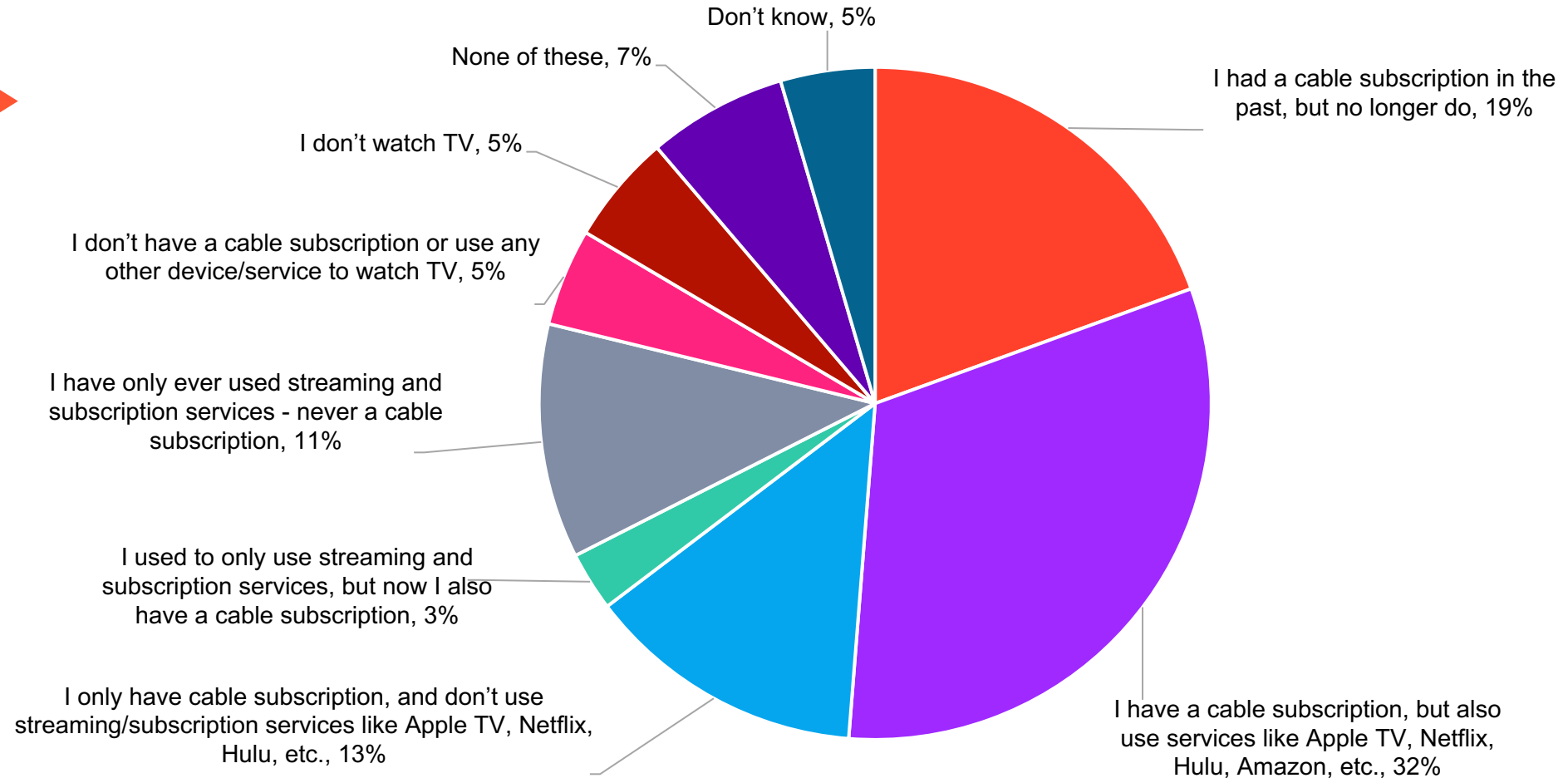
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## How Americans watch television

**The biggest segment of US television consumers is people who have cable and also subscribe to OTT services.**

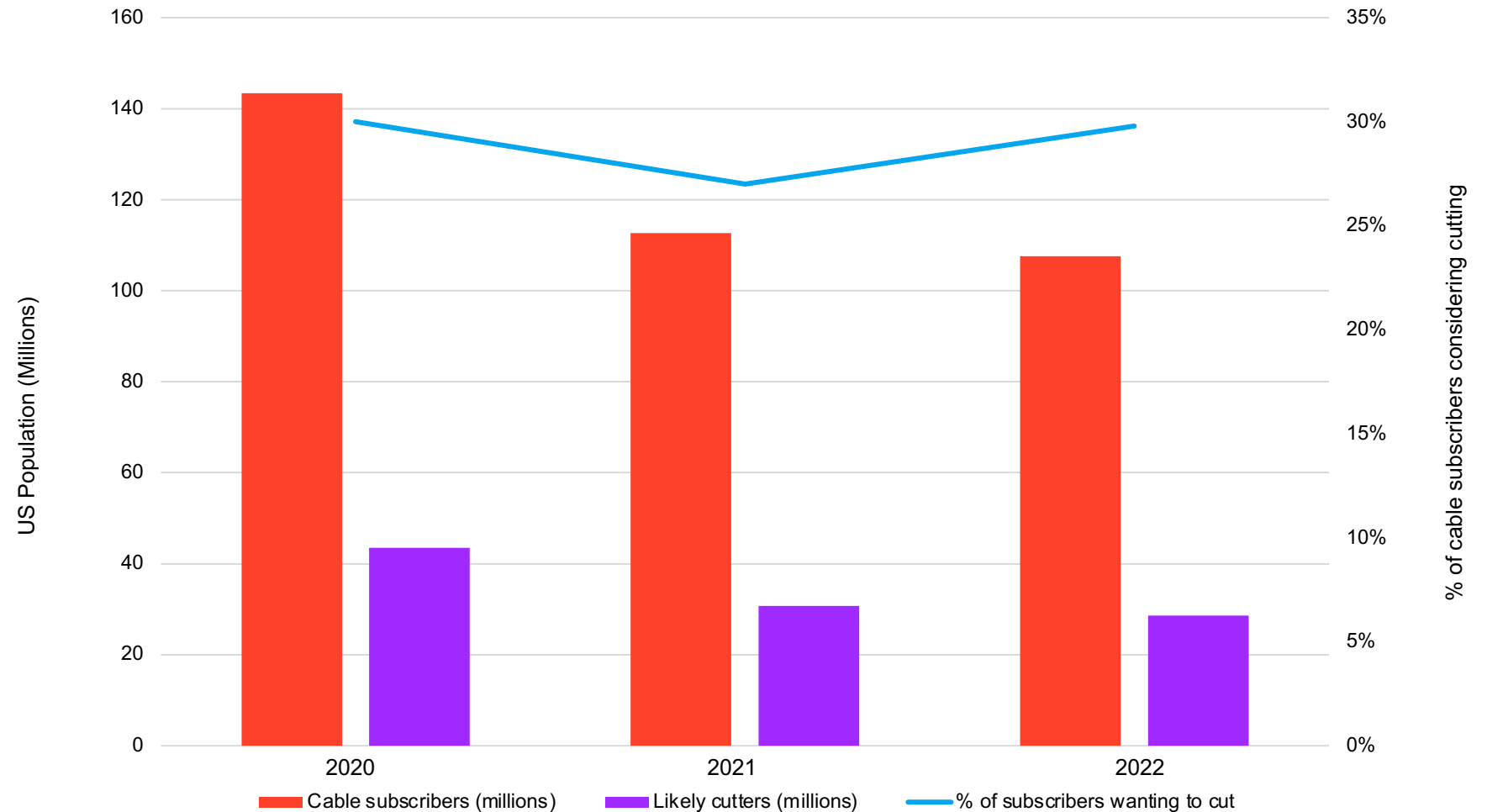


Q: Which, if any, of the following best describe the services you have to watch TV? Please select one option only.  
YouGov Profiles, February 2022

## Cord-cutting throughout COVID-19

The pandemic initially accelerated cord-cutting before levelling off in 2021, when prospective cord-cutters took little action.

This trend appears to be reverting in 2022.

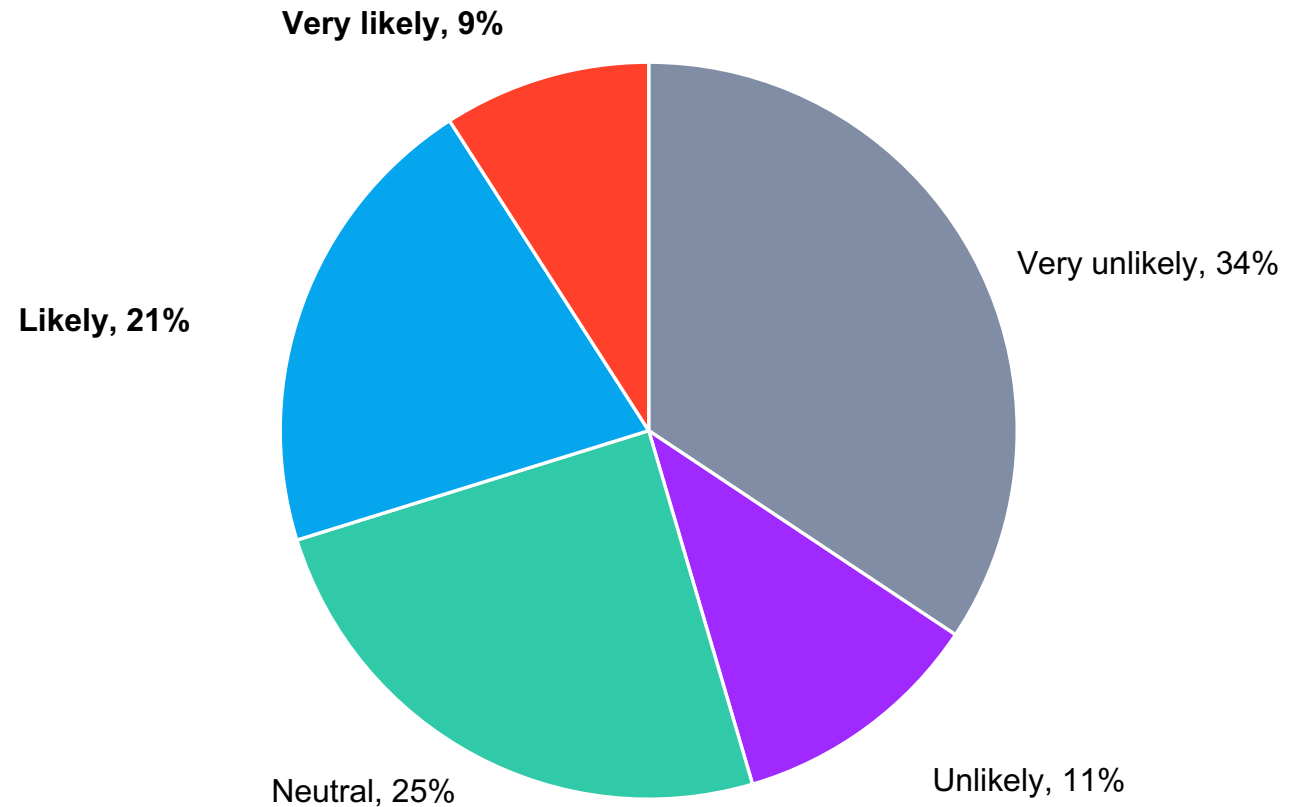


Q: Likelihood to cancel cable subscription in next 6 months  
 YouGov Profiles, February 2020, 2021, 2022



**Of the 45% of Americans in February 2022 who said they have subscriptions to cable:**

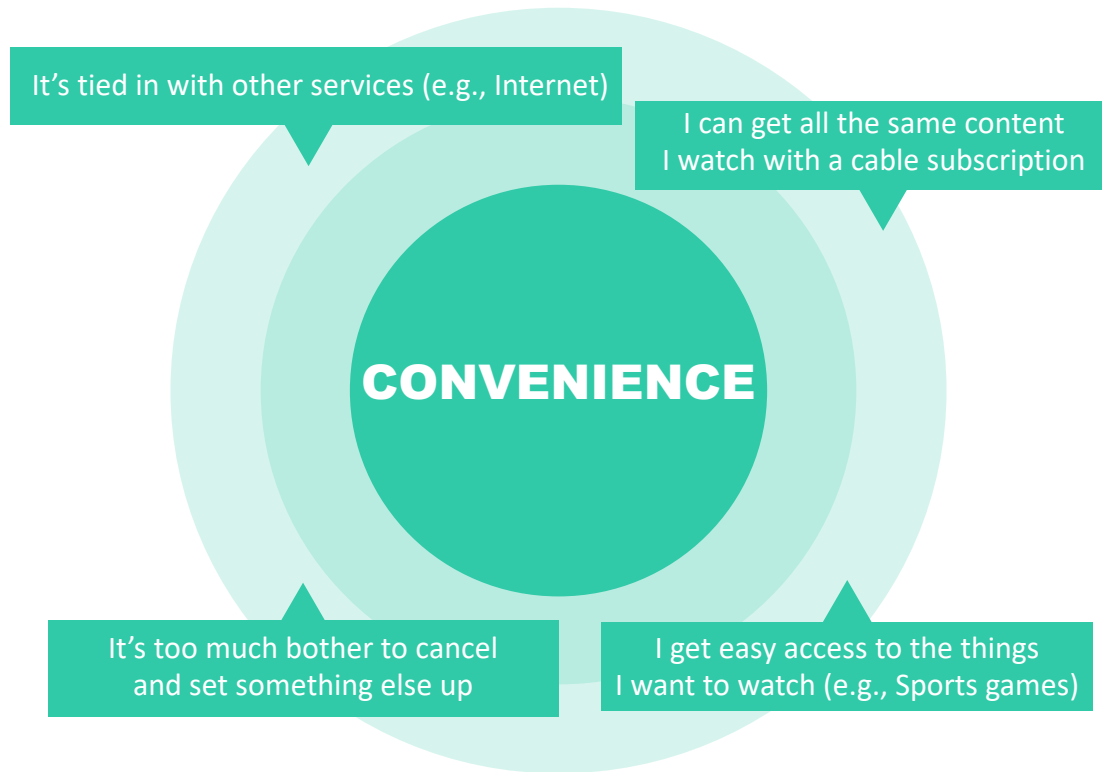
## Likelihood of canceling cable subscription (US)



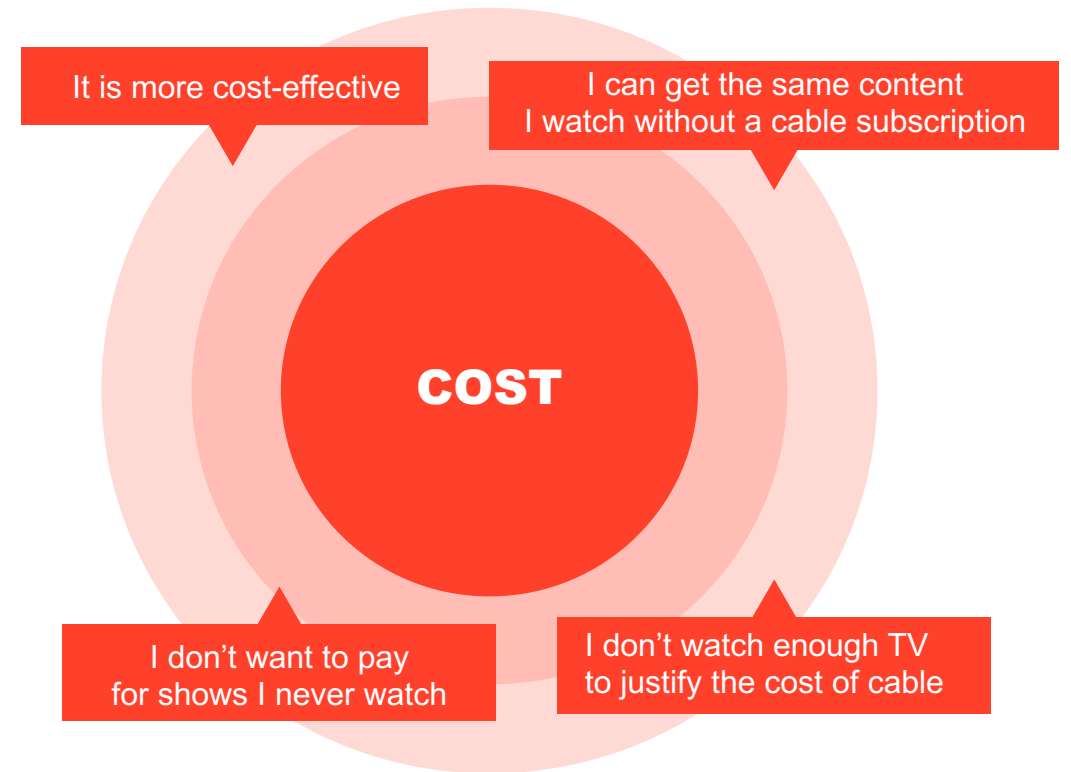
Q: Likelihood to cancel cable subscription in next 6 months  
YouGov Profiles, February 2022

# Why would you want to:

## **Keep Cable**

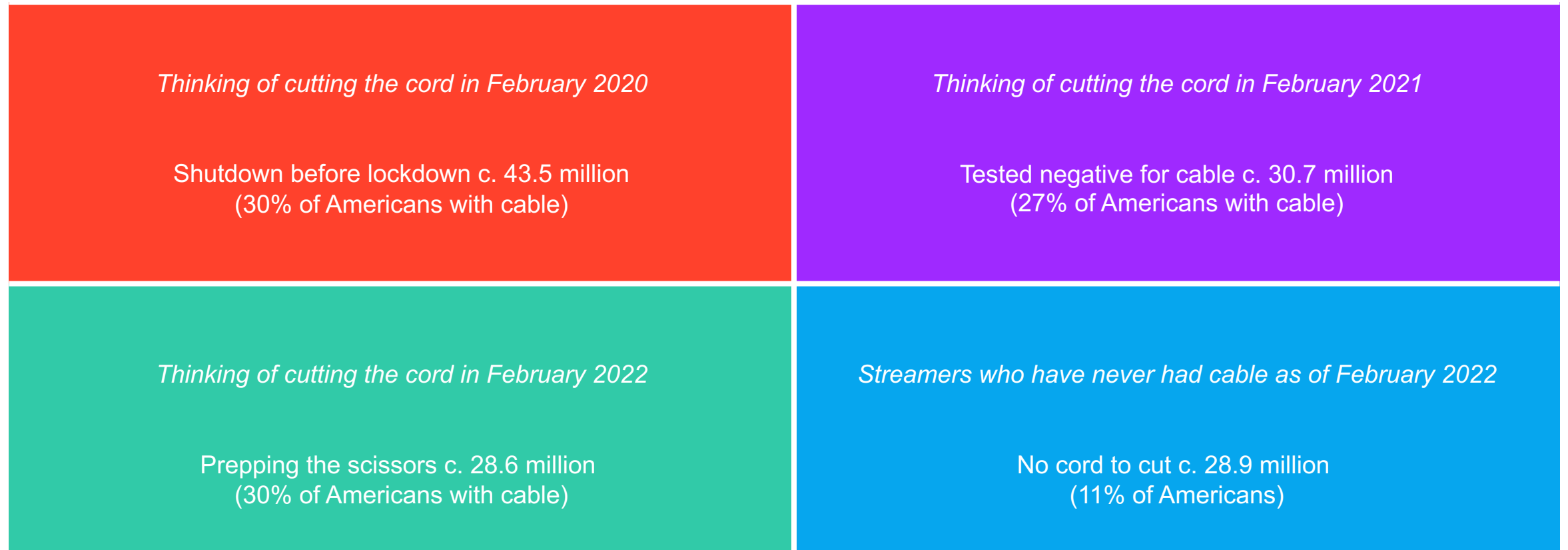


## **Cancel Cable**



# Prospective cord-cutters throughout COVID-19

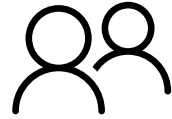
**Population: USA 18+ (256 Million)**



# Audience Profile: Shutdown before lockdown

**Pre-COVID  
Cord-cutters**

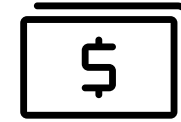
**51.9 million**



**40%**  
are aged 18-34



**59%**  
are males



**26%**  
have gross personal income  
between \$50,000 to \$99,999



### Paid Streaming Subscriptions

Netflix	38%
Amazon Prime	23%
Hulu	16%



### Daily Streaming Watchers

YouTube	24%
Netflix	21%
Hulu	12%



### Streaming Live TV Frequency

Several times a week	17%
Several times a day	23%
Once a day	14%
Once a week	5%
Once every 2-3 weeks	12%
Never	17%



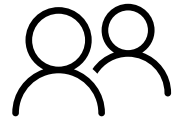
### Podcasts Listeners/Non-listeners

I listen to podcasts	67%
Podcasts don't interest me	15%
I don't have the time	7%
Not found good podcasts	4%
I don't know how	3%
Choice is overwhelming	1%

# Audience Profile: Tested negative for cable

**COVID  
Cord-cutters**

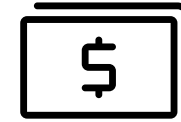
**54.6 million**



**38%**  
are aged 55+



**61%**  
are males



**24%**  
have gross personal income  
between \$50,000 to \$99,999



### Paid Streaming Subscriptions

Netflix	35%
Amazon Prime	26%
Hulu	14%



### Daily Streaming Watchers

YouTube	19%
Netflix	19%
Hulu	10%



### Streaming Live TV Frequency

Several times a week	15%
Several times a day	15%
Once a day	14%
Once a week	5%
Once every 2-3 weeks	9%
Never	24%



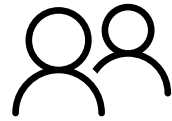
### Podcasts Listeners/Non-listeners

I listen to podcasts	61%
Podcasts don't interest me	19%
I don't have the time	7%
Not found good podcasts	6%
I don't know how	5%
Choice is overwhelming	1%

# Audience Profile: Prepping the scissors

COVID-continued Cord-cutters

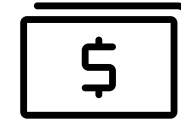
55.4 million



**45%**  
are aged 18-34



**61%**  
are males



**27%**  
have gross personal income between \$50,000 to \$99,999



### Paid Streaming Subscriptions

Netflix	40%
Amazon Prime	29%
Disney+	20%



### Daily Streaming Watchers

YouTube	31%
Netflix	22%
YouTube TV	15%



### Streaming Live TV Frequency

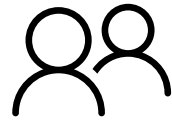
Several times a week	23%
Several times a day	19%
Once a day	18%
Once a week	6%
Once every 2-3 weeks	11%
Never	13%



### Podcasts Listeners/Non-listeners

I listen to podcasts	77%
Podcasts don't interest me	12%
I don't have the time	4%
Not found good podcasts	3%
I don't know how	3%
Choice is overwhelming	1%

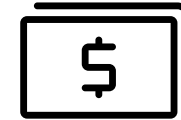
# Audience Profile: No cord to cut



**44%**  
are aged 18-34



**55%**  
are males



**20%**  
have gross personal income  
between \$50,000 to \$99,999



### Paid Streaming Subscriptions

Netflix	34%
Amazon Prime	25%
Disney+	13%



### Daily Streaming Watchers

YouTube	27%
Netflix	21%
Hulu	15%

## Never Cablers

28.9 million



### Streaming Live TV Frequency

Several times a week	8%
Several times a day	11%
Once a day	10%
Once a week	5%
Once every 2-3 weeks	15%
Never	32%



### Podcasts Listeners/Non-listeners

I listen to podcasts	52%
Podcasts don't interest me	22%
I don't have the time	8%
Not found good podcasts	8%
I don't know how	3%
Choice is overwhelming	1%

# Positive Trends in US Digital Media



## Social Media

Platform	2021	2022
TikTok	5%	20%
Instagram	32%	42%
Twitter	32%	36%
Snapchat	14%	17%

Q: Which, if any, of the following social networks have you used within the last month?  
Please select all that apply.

YouGov Profiles: February 2021, February 2022



## Gaming Stream

Platform	2021	2022
Discord	4%	8%
FB Gaming	5%	7%
Twitch	12%	15%
YT Gaming	10%	14%

Q: Which, if any, of the following apps and/or platforms do you use to watch live gaming streams? Please select all that apply.

YouGov Profiles: February 2021, February 2022



# The data in this framework was sourced from YouGov Profiles.

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YouGov Profiles makes it simple to find and understand the audience that matters most to your business. It gives you the power to build a custom portrait of your consumers' entire world with unrivaled granularity.

Our profiling database gives you access to hundreds of thousands of demographic, psychographic, attitudinal, and behavioral consumer metrics.

1

Over **230,000** highly engaged US panelists (18+)

4

Global Variables – 100% square across **50,000** panelists on the **10,000** most used variables

2

Dataset updated weekly

5

Passively tracked data

3

Access to over **400,000** data variables

6

Re-contactable respondents



**YouGov Profiles**

# 4

## Emergent Streaming Channels

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YouGov Signal is a social listening platform monitoring conversation and sentiment online.

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# Methodology Metrics – Appetite Score

## **Appetite Score - Combined Index**

***Insight Into: Popularity + Demand***

Appetite Score is a scaled value between (worst) and 100 (best) which averages and scales the most predictive publicly available social and digital data per title per day to indicate a title's performance in terms of audience demand.

## **Indexed Search Volume - Index**

***Insight Into: Public Interest***

This is a relative value of daily online searches between titles. Comparable within specific territories to other titles of the same type (Brand, Movie, etc.).

## **Wikipedia Volume - Volume**

***Insight Into: Public Curiosity***

The daily number of views a specific title's Wikipedia page receives.

## **Sentiment: Positive/Negative/Neutral**

***Insight into: Public Feeling***

The percentage of all daily sentiment regarding titles or talent which was positive, Negative, or Neutral. Each segment is displayed individually, Sentiment can be further filtered into Joy, Anticipation, Surprise, Anger/Disgust, and Sadness.

## **Torrent Downloads**

***Insight Into: Popularity + Demand & Public Interest***

The number of times a movie or TV show episode has been illegally downloaded, tracked daily.

## **Twitter Volume - Volume**

***Insight Into: Popularity + Demand & Public Interest***

The total number of tweets where a title is mentioned.

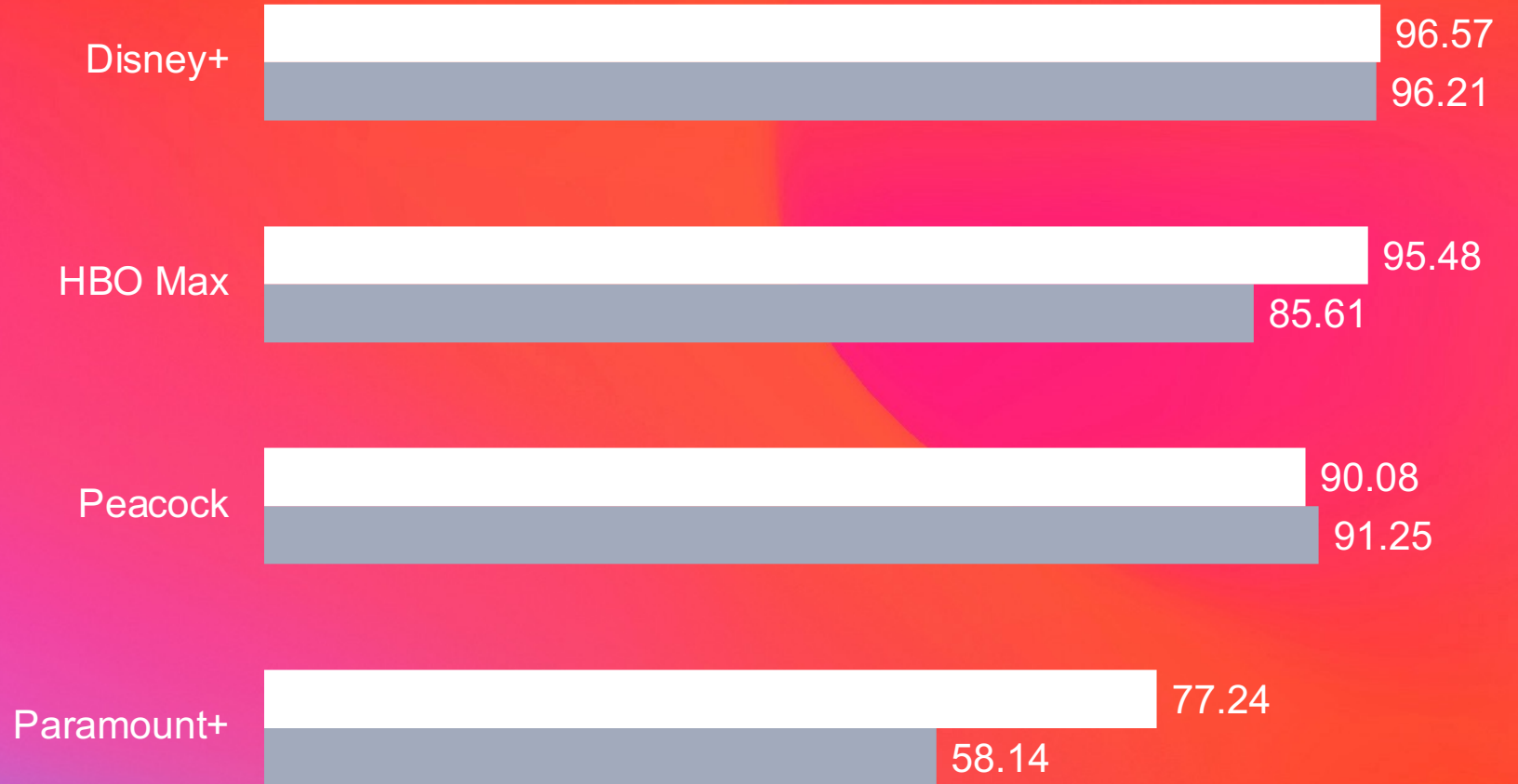
# SVOD Brand Popularity

## Increased demand for new streaming platforms

With expertly curated content and expansive library catalogs, HBO Max and Paramount+ successfully established their niche in the burgeoning streaming space in 2021. As a result, these two digital apps expanded their popularity among American TV audiences.

### New Streaming Platforms – US Appetite Scores

■ 2021 ■ 2020



# Most Popular New Series of 2021

- 60% of Top 10 NEW series are Disney+ Originals
- 75% of all top 20 titles are SVOD series
- Majority of titles are of the action-adventure and fantasy genres

#1

WandaVision

APPETITE SCORE RANKING

97.12

#1

#2

Loki

APPETITE SCORE RANKING

95.94

#2

#3

Hawkeye

APPETITE SCORE RANKING

91.69

#3

## Most Popular NEW Series of 2021 – Top 20 United States

Rank	Title	Platform	Appetite Score	Rank	Title	Platform	Appetite Score
1	<b>WandaVision</b>	Disney+	97.12	11	<b>L&amp;O: Organized Crime</b>	NBC	86.36
2	<b>Loki</b>	Disney+	95.94	12	<b>Mare of Easttown</b>	HBO Max	86.06
3	<b>Hawkeye</b>	Disney+	91.69	13	<b>Kevin Can F**k Himself</b>	AMC	85.20
4	<b>Vincenzo</b>	Netflix	91.31	14	<b>The Wheel of Time</b>	Amazon Prime Video	84.70
5	<b>What If...?</b>	Disney+	90.71	15	<b>The Nevers</b>	HBO Max	82.88
6	<b>The Falcon-Winter Soldier</b>	Disney+	90.70	16	<b>Shadow and Bone</b>	Netflix	82.85
7	<b>The Equalizer</b>	CBS	88.93	17	<b>Gossip Girl</b>	HBO Max	82.31
8	<b>The Book of Boba Fett</b>	Disney+	88.09	18	<b>Squid Game</b>	Netflix	82.00
9	<b>Superman and Lois</b>	The CW	87.92	19	<b>iCarly</b>	Paramount+	81.49
10	<b>Ginny &amp; Georgia</b>	Netflix	86.97	20	<b>Walker</b>	The CW	81.08

# 5 Key Takeaways

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## Key takeaways

- Willingness to cut the cord differs in each audience segment
- Convenience is the key factor for keeping cable, while cost is the key factor for streaming
- Aligning marketing plans to the evolving media landscape requires agility and nimbleness
- The majority of never cblers are millennial males who stream daily video content
- In 2022, a good medium to advertise to cord-cutters would be via podcasts and YouTube

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# Thank you