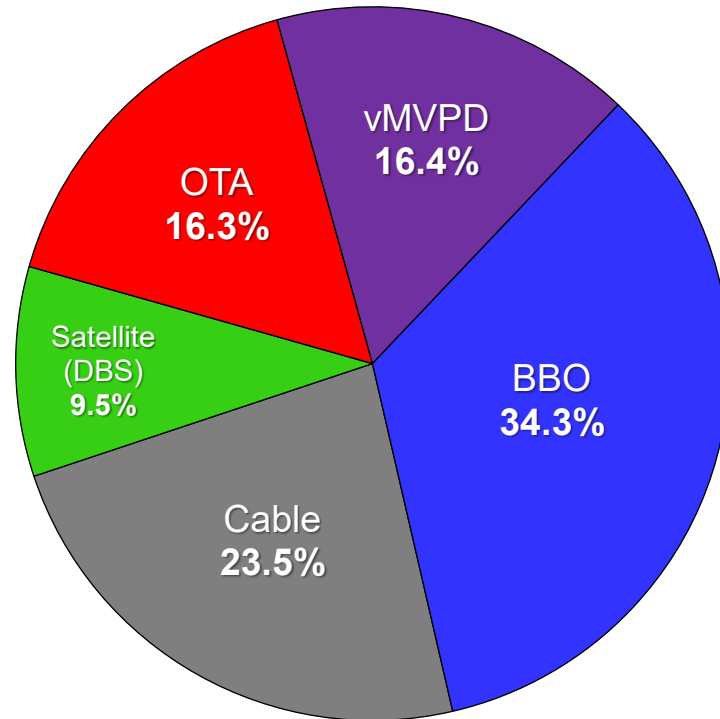


# 16.3% Of U.S. TV Households Receive Their TV Signal From An OTA (Over-The-Air) Antenna

## July 2025 Television Households



■ Cable ■ Satellite (DBS) ■ OTA (Over-the-Air) ■ vMVPD (Virtual Multichannel Video Programming Distributor) ■ BBO (Broadband Only Homes)

Source: Nielsen National Media-Related Universe Estimates July 2025; As of April 2024, Nielsen changed the definition of ADS Households, by removing vMVPD households from BBO and OTA. These homes are now classified as ADS homes. vMVPD is calculated by subtracting Cable and DBS HHs from Cable Plus HHs.



# OTA Household Penetration Is Strong In Individual Markets!

July 2025 OTA Penetration in individual markets reached as high as 32%!

**Top 10 OTA Levels of TV HHs in Markets 1-50**

| DMA Rank | DMA Name                 | % OTA |
|----------|--------------------------|-------|
| 48       | ALBUQUERQUE-SANTA FE, NM | 32.0  |
| 47       | OKLAHOMA CITY, OK        | 30.3  |
| 6        | HOUSTON, TX              | 28.8  |
| 38       | MILWAUKEE, WI            | 25.3  |
| 12       | PHOENIX (PRESCOTT), AZ   | 24.6  |
| 18       | MIAMI-FT. LAUDERDALE, FL | 23.4  |
| 33       | KANSAS CITY, MO          | 23.2  |
| 37       | CINCINNATI, OH           | 22.4  |
| 4        | DALLAS-FT. WORTH, TX     | 21.9  |
| 16       | MINNEAPOLIS-ST. PAUL, MN | 22.0  |

Source: Nielsen July 2025; Effective April 2024, vMVPD homes included in ADS market break and removed from OTA and BBO market breaks.



# Wired Cable & DBS Are In Decline While Broadcast Only is Up +20% Over July 2024

## National Media Related Universe Estimates

| % TV Households |             |       |                      |       |       |
|-----------------|-------------|-------|----------------------|-------|-------|
| Survey          | Wired Cable | DBS   | Broadcast Only (OTA) | VMVPD | BBO   |
| July 2025       | 23.4%       | 9.5%  | 16.3%                | 16.4% | 34.3% |
| May 2025        | 24.4%       | 9.9%  | 15.6%                | 16.9% | 33.3% |
| February 2025   | 25.5%       | 10.5% | 14.9%                | 16.6% | 32.5% |
| November 2024   | 26.9%       | 11.0% | 14.4%                | 15.5% | 32.2% |
| July 2024       | 28.6%       | 11.9% | 13.3%                | 15.6% | 30.6% |
| May 2024        | 29.5%       | 12.2% | 12.9%                | 15.8% | 29.5% |

Source: Nielsen National Media-Related Universe Estimates July 2025; As of April 2024, Nielsen changed the definition of ADS Households, by removing vMVPD households from BBO and OTA. These homes are now classified as ADS homes. vMVPD is calculated by subtracting Cable and DBS HHs from Cable Plus HHs.

DBS=satellite; Broadcast Only/OTA=over-the-air/antenna; VMVPD=virtual multichannel video program distributor; BBO=broadband only

