

Determinants of Consumer Choice between Pay Television and Streaming Services in South Africa

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Citation: Lefowa, L., & Makaleng, M. S. M. (2026). Determinants of Consumer Choice between Pay Television and Streaming Services in South Africa, *Journal of Cultural Analysis and Social Change*, 11(3), 39-45.
<https://doi.org/10.64753/jcasc.v11i3.5020>

Published: October 26, 2026

ABSTRACT

The swift growth of streaming video-on-demand (SVOD) platforms has fundamentally disrupted the traditional pay television (pay TV) market in South Africa. This study examines the determinants of consumer choice between pay TV and SVOD, namely: content variety and exclusivity; convenience and usability; habit and social influence. A quantitative, cross-sectional survey was administered to 272 South African consumers. Multiple regression analysis and partial least squares structural equation modelling (PLS-SEM) were used to analyse the data collected from 272 respondents. The measurement model revealed acceptable construct reliability and convergent validity. The results converge across both analytical methods and indicate that SVOD services are primary viewing platforms for many respondents, although a substantial proportion of households subscribe to both pay TV and SVOD platforms. Nevertheless, statistical analysis demonstrates that frequently cited determinants such as content variety and exclusivity; convenience and usability; habit and social influence do not significantly account for consumer choice within the sampled population. Further, the findings suggest that the South African television market has entered the stage of maturity where traditional adoption drivers have become a baseline expectation rather than differentiating factor. Consequently, consumer decisions may be substantially influenced by structural factors such as ecosystem partnerships, content rights strategies, and bundled service offerings. Based on the key results, it is recommended that media firms shift strategic focus toward ecosystem-level competition, exclusive content rights, telecommunications bundling, and household-level subscription management.

Keywords: Pay TV, Streaming Video-On-Demand, Consumer Choice, South Africa, Digital Media Adoption

INTRODUCTION

The global television industry is experiencing a profound structural transformation as SVOD platforms are increasingly reshaping the patterns of media consumption. Digital streaming services are providing viewers with on-demand access to content across multiple devices and thereby challenging the traditional broadcast model that is based on scheduled programming (Evens et al., 2024). As broadband connectivity and smartphone adoption expand globally, consumers are increasingly shifting from linear television toward flexible streaming environments (PwC, 2023).

South Africa reflects similar industry dynamics. Historically, satellite pay TV services dominate the South African television market and with increased industry competitiveness new entrants are creating rapid market disruption. Following the entrance of global streaming platforms such as Netflix, Amazon Prime Video, and Disney+ to name a few, local streaming services such as Showmax have also expanded their offerings in response

to this competitive pressure (Ferreira, 2024). These developments have intensified competition for subscribers and advertising revenue across the entertainment sector.

Several factors are commonly cited as influencing consumer decisions regarding television platforms. For instance, previous studies highlight content availability, user experience, and technological accessibility as key determinants of streaming adoption (Udoakpan & Tengeh, 2020; Singh, 2023; Basha & Reddy, 2024). However, the relative importance of these determinants varies across different geographic and socio-economic contexts.

Despite the rapid growth of streaming platforms in South Africa, limited empirical research has quantitatively examined the determinants of consumer platform choice within the country. Existing studies often rely on international datasets that may not fully capture the dynamics of emerging media ecosystems (Ngwenya et al., 2023). This study therefore, examines the factors influencing consumer choice between pay TV and SVOD services in South Africa using quantitative survey data. The independent variables the study focused on were: content variety and exclusivity, convenience and usability, and habit and social influence.

Background of pay TV and SVOD services

SVOD platforms are slowly becoming a preferred alternative to traditional pay TV services and, resulting in an underlying structural evolution of the global television industry. Accordingly, streaming services are gaining traction. People are drawn to their affordability, the convenience of on-demand viewing, and the flexibility they provide, especially when compared to traditional cable and satellite packages (Siuli, 2024:142). This move has been accelerated in South Africa by the rise of global platforms like Netflix and Amazon Prime, along with local competitors such as Showmax, and the decrease in mobile data costs (Ngwenya et al., 2023; Pillay & Struweg, 2023; PwC, 2023; ICASA, 2023). Research suggests that several factors influence how people watch television. These include how easily they can access and use the content and the variety of content available (Mulla, 2022; Menon, 2022). In addition, consumers are increasingly valuing mobile streaming and personalised recommendation services fitting their lifestyles, as these options allow them to access content from anywhere, anytime without restrictions. This study uses a quantitative methodology to determine the relative importance of different factors and to identify the strongest independent variable of consumer choice between pay TV and SVOD services.

Problem Statement

A review of current research suggests that conventional pay TV services, which previously held a dominant position in South Africa, are witnessing a considerable subscriber churn as audiences transition to streaming platforms that provide adaptable, customised, and economically viable options (ICASA, 2022). This trend is often called "cutting the cord" (Sahu et al., 2021). Notwithstanding this trend, there is a paucity of empirical data that quantifies the precise factors influencing consumer choices within this specific environment.

The scarcity of prior research that highlights the necessity for a rigorous, evidence-based study into the factors driving South African consumers' transition from pay TV to SVOD services. Comprehending these key influences is crucial for media institutions aiming to modify their service models and content approaches in an increasingly competitive digital landscape.

Research Questions

This study's primary research question is: What are the factors that influence consumers' choice between pay TV and SVOD in South Africa? The secondary research questions are listed below:

- i. How does content variety and exclusivity influence consumer preference of SVOD over pay TV in South Africa?
- ii. To what extent do socio-demographic factors (age, income, location, and education) affect the selection of pay TV versus SVOD in South Africa?

LITERATURE REVIEW

Key Determinants of Consumer Choice

Content Variety and Exclusivity

The richness of content, exclusivity, and creativity in presenting it are critical components that distinguish platforms, including encouraging consumers to return (Chiang & Jhang, 2020). Streaming services are increasingly competing based on the scope of their curated libraries, relevance of content to local audiences, and the number of exclusive titles they offer. In South Africa, subscriber preferences continue to be strongly shaped by the availability of culturally relevant local content and the possession of exclusive sports broadcasting rights (Chalaby, 2024). As the global market experiences increasing saturation, the key differentiator for service providers is shifting from service availability to the quality of their content offerings (Khanna et al., 2025). Furthermore, the

investigations on over-the-top (OTT) services demonstrate a deep connection between the diversity of content offered, its perceived entertainment value, and user satisfaction value. This relationship is also associated with the frequency of service usage and the likelihood of users recommending the service to others.

Convenience and Usability

Convenience and usability are rooted in the Technology Acceptance Model (TAM) and UTAUT2, where perceived ease of use extensively influences adoption (Chen et al., 2024). Streaming services offer:

- i. On-demand viewing
- ii. Multi-device accessibility
- iii. Personalised recommendations

These features have historically driven rapid adoption. However, recent research suggests that usability has transitioned into a “hygiene factor” (Nderitu & Mutinda 2024:843). That is, while poor usability can deter users, high usability no longer guarantees preference because it is now standardised across platforms. For example, Netflix, Amazon Prime Video, Disney+, and Showmax are easily accessible and usable, unlike previously.

Evens et al. (2024) argue that interface convergence driven by artificial intelligence recommendation engines and user experience (UX) design best practices has reduced differentiation. As a result, usability influences satisfaction, but not necessarily choice, and this is further corroborated by this study under the results section.

Habit and Social Influence

The frequency of media consumption and the impact of social interactions can shape platform loyalty and the propensity to switch services. In South Africa, the early users of streaming video on demand services are typically characterised by their youth, urban residence, and technological adeptness. Conversely, traditional pay TV services are more commonly utilised by older individuals or those with lower incomes (Udoakpan & Tengeh, 2020; Sahu et al., 2021; Menon, 2022). Moreover, social influence, which includes peer recommendations and existing cultural trends, plays a crucial role in expediting platform adoption, especially among younger cohorts (Weidhaas et al., 2021).

Best Practice: Benchmark Studies

This investigation is predicated on a diverse array of international research. Lee et al. (2021) in their cross-national empirical analysis reveal that the adoption of OTT services is significantly influenced by broadband infrastructure, competition amongst platforms and the scale of the traditional pay TV landscape. Papathanasopoulos and Varoutas (2025) examined SVOD trends within EU-27 countries, and their findings indicate a significant relationship between content exclusivity, service quality, and subscription choices. Park and Kwon (2023) further examined the competitive dynamics within the SVOD market and emphasise the shifting consumer inclinations influenced by competitive pricing strategies, diverse content offerings, as well as the pursuit of instant satisfaction. Collectively, these studies offer a comprehensive understanding of complex factors that influence consumer decisions between pay TV and SVOD. However, their research primarily concentrates on developed-market scenarios, underscoring the need for empirical evidence from South Africa.

Theoretical Foundation

The study is informed by three theoretical perspectives. First, the Technology Acceptance Model (TAM), which posits that the adoption of a technology is contingent upon its perceived benefit and ease of use (Menon, 2022). Second, the “Uses and Gratifications Theory (UGT) which in contrast views consumers as active participants who choose media to meet specific gratifications such as, information, entertainment, and social needs” (Mulla, 2022). Last, and in accordance with the latter premise, is the Unified Theory of Acceptance and Use of Technology 2 (UTAUT2) “which suggests that socio-demographic variables serve as moderators, and that performance expectancy, effort expectancy, social influence, facilitating conditions, hedonic motivation, price value, and habit are all fundamental determinants influencing technology adoption” (Venkatesh et al., 2012; Chen et al., 2024). The three theoretical perspectives when integrated, shape the conceptual model which proposes: price sensitivity, content variety and exclusivity; convenience and usability; internet access and technology; in addition, habit and social influence, together predict consumer service orientation between pay TV and SVOD.

METHODOLOGY

A cross-sectional quantitative research design was utilised. An online survey was used to collect data, and it was distributed through social media platforms, LinkedIn and WhatsApp. A survey was selected because it is easy

to administer, less time-consuming, and increase in geographical spread of respondents (Sheik et al., 2024:31). The convenience sampling method was chosen as a suitable option based on challenges experienced in developing a sampling frame; hence, the selection of non-probability and snowballing techniques. Active subscribers of pay TV services such as DStv and SVOD platforms, aged between 18 and 60 years, were targeted for this study. The questionnaire incorporated validated five-point Likert-scale items, which were designed to evaluate the three independent variables under investigation, alongside inquiries pertaining to socio-demographic factors and service usage patterns. Based on the Cochran formula, a target sample size of 385 respondents was determined using a 95% confidence level and a 5% margin of error. A response rate of 70.6% was achieved with 272 valid responses.

Data analysis proceeded in three stages. First, descriptive statistics were computed using SPSS version 31 to profile the sample and assess distributional properties. Second, PLS-SEM was conducted using SmartPLS with 3,000 bootstrap resamples to evaluate the measurement model (indicator reliability, composite reliability, convergent validity, and discriminant validity) and the structural model (path coefficients, R^2 , and effect sizes). Third, multiple regression analysis was performed in SPSS as a robustness check to triangulate the PLS-SEM findings. Ethical clearance was obtained prior to data collection from Johannesburg Business School. Participation was voluntary and anonymous, with electronic consent obtained beforehand. “No personally identifiable information was collected in compliance with South Africa's Protection of Personal Information Act (POPIA)”, (University of Cape Town, 2024).

RESULTS

Sample Characteristics

The sample primarily composed of working-age adults; representing a range of significant age groups between 33–39 years 41.2% (112), followed by a range between 40–46 22.8% (62). A substantial proportion possessed postgraduate degrees 63.6% (173), lived in urban settings 86.0% (234), and had a monthly household income surpassing ZAR 40,000, 66.2% (180). Based on this study's findings, 45.6% (124) of users demanded SVOD services, while 19.1% (52) demanded pay TV. Notably, 30.1% (82) of users reported using both services equally, indicating a significant level of multi-homing. Another finding was that a majority 75.6% (206), had utilised their primary service for more than three years; depicting well-established consumption patterns.

Measurement Model Assessment

Following the removal of one poorly performing indicator (IAT1), the revised measurement model demonstrated acceptable psychometric properties. Table 1 summarises the construct reliability and convergent validity results.

Table 1: Construct Reliability and Convergent Validity

Construct	α	CR	AVE	Items
Content Variety & Exclusivity	0.589	0.758	0.514	3
Convenience & Usability	0.599	0.749	0.501	3
Habit & Social Influence	0.674	0.820	0.608	3

All constructs met the recommended thresholds for composite reliability ($CR \geq 0.70$) and average variance extracted ($AVE \geq 0.50$). Discriminant validity was confirmed using Fornell–Larcker with each construct's square root of AVE exceeding inter-construct correlations.

Structural Model Results

The structural model's R^2 value was 0.022; suggesting that the three independent variables considered conjunctly; accounted for a mere 2.2% of the variation observed in consumer service orientation. The path coefficients and the outcomes of the three independent variables tests are detailed in Table 2.

Table 2: Structural Model Results

Path	β	t-value	p-value	f^2	Decision
CVE $\rightarrow$ CC	0.115	1.609	0.109	0.011	Not supported
CU $\rightarrow$ CC	0.018	0.236	0.814	0.000	Not supported

HSI → CC	0.	0.448	0.654	0.	Not supported
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Notes: CVE = Content Variety & Exclusivity; CU = Convenience & Usability; HSI = Habit & Social Influence; CC = Consumer Choice. Bootstrap = 3,000 resamples.

None of the three independent variables achieved statistical significance at the 5% level. All effect sizes (f^2) were negligible, confirming the limited practical significance of the individual independent variables.

Robustness Check: Multiple Regression Analysis

The multiple regression analysis supported the results from the PLS-SEM. The comprehensive model lacked statistical significance ($F = 1.118$, $p = 0.351$; adjusted $R^2 = 0.002$), and none of the independent variables were significant. Variance inflation factors (VIFs) for all individual independent variables fell below 1.30, confirming the absence of multicollinearity. The convergence of results across both analytical methods strengthens confidence that the non-significant findings are substantive rather than artefactual.

DISCUSSION

Empirical results reveal that none of the three independent variables; content variety and exclusivity; convenience and usability; habit and social influence; significantly predict consumer service orientation in the sampled population. These findings stand in contrast to prior studies that demonstrate significant effects pertaining to these variables in other national contexts (Lee et al., 2021; Menon, 2022; Bhattacharyya et al., 2022). This could be a suggestion that the competitive dynamics of the South African television market are still evolving.

Several theoretically grounded explanations account for this divergence. First, the South African television market may have entered a phase of maturity characterised by feature convergence across competing platforms. When all major providers offer user-friendly interfaces, mobile compatibility, and on-demand access, convenience and usability cease to function as differentiating attributes and instead become hygiene factors necessary for attaining satisfaction but insufficient for competitive advantage (Peraiya & Ajith, 2023). In TAM and UTAUT2 terms, effort expectancy is most influential during early adoption; once consumers have internalised streaming interfaces, its explanatory power diminishes (Mulla, 2022).

Second, the prevalence of multi-homing behaviour in the sample 30.1% (82), using both services equally) suggests that consumer choice is not binary. Rather than selecting between pay TV and SVOD, many South African households maintain overlapping subscriptions, incorporating streaming services into existing pay TV arrangements (Park & Kwon, 2023; Chalaby, 2024). In multi-subscription contexts, incremental adoption decisions may be driven by content-specific triggers such as exclusive sports rights or original local productions, rather than by generalised attitudinal orientations (Khanna et al., 2025).

Third, the sample's socio-demographic composition, primarily urban, highly educated, and comprising high-income earners; may have diminished the significance of structural constraints such as convenience and usability, content variety, and exclusivity. As such, these factors may no longer serve as substantial constraints regarding platform selection for consumers (Ngwenya et al., 2023; Pillay & Struweg, 2023).

Fourth, the findings indicate that consumer preferences may be increasingly influenced by factors that are not accounted for in the current conceptual model, including contractual lock-in arrangements, household media ecosystem dynamics, and content windowing practices (KPMG, 2023; Napoli, 2019; Dairo & Szűcs, 2022; Chalaby, 2024). The structural and market-level factors are examined in a manner that differs from the individual-level attitudinal independent variables that were examined in this study.

CONCLUSION

This study examined the determinants of consumer choice between pay TV and SVOD in South Africa by testing three determinants using PLS-SEM and multiple regression analysis. The results indicate that none of the proposed independent variables: content variety and exclusivity; convenience and usability; habit and social influence, exerted a statistically significant direct effect on consumer service orientation in the sampled population.

The study enhances the current body of knowledge in three primary ways. First, it provides real-world evidence that traditional technology adoption models, like the Technology Acceptance Model (TAM) and the Unified Theory of Acceptance and Use of Technology 2 (UTAUT2), might not be as effective in mature media marketplaces with multiple subscriptions and where service features have become more similar. In addition, this study enhances the existing research on streaming adoption within Sub-Saharan Africa, thus addressing the geographical gaps identified (Khanna et al., 2025; Dairo & Szűcs, 2022). The analysis also emphasises the significance of market maturity as a moderating variable, which subsequently affects the correlation between individual-level factors and adoption outcomes. The results also offer strategic insights for broadcasters, streaming

platforms, and policymakers seeking to comprehend the changing patterns of media usage behaviour in the digital era.

The results indicate the unlikelihood of South African media institutions gaining a competitive edge through incremental adjustments to content scope or user-friendliness strategies. Strategic differentiation should instead prioritise competition within the broader ecosystem, encompassing the administration of household subscription portfolios and the acquisition of exclusive content rights (especially for sports programming and locally produced originals).

A formal pilot study was not undertaken in this MBA capstone project due to the limited timeframe available for completing the research. To enhance the instrument's quality, the questionnaire was developed using previously validated measures from the literature and reviewed by the supervisor and subject-matter experts to ensure content validity, clarity, and alignment with the research objectives. Furthermore, the reliability and validity of the measurement instrument were subsequently assessed using the final dataset through appropriate statistical analyses (e.g., Cronbach's alpha and construct validity measures).

Important considerations to be noted regarding the study's shortcomings include: The application of the convenience sampling method, in view of the fact that most participants lived in cities with higher education and income earnings, limits the ability to apply the findings to a wider group. The cross-sectional design precludes causal inferences, and the conceptual model's low R^2 value suggests the omission of significant variables that might explain observed phenomena. Future research should prioritise structural and market-level factors, encompassing bundling strategies, content-specific switching triggers, contractual stipulations, longer data collection period, multiple recruitment strategies and a probability sampling technique. To achieve a more inclusive understanding of how individuals make decisions regarding multiple subscriptions, longitudinal panel designs and qualitative or mixed-methods approaches may be beneficial to explain some phenomena and gain an in-depth insight to factors that influence consumer choice between pay TV and SVOD in South Africa.

ACKNOWLEDGMENT

This paper is an output of the MBA Capstone Project at the Johannesburg Business School, University of Johannesburg. The author wishes to acknowledge the guidance of the project supervisor, Dr Mpho Sharon Makgedi Makaleng, and the participation of all respondents who contributed to the study.

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