

BESPOKE SURVEYS

Streaming Video Domestic, Vol 37

1000+ US Consumers Balanced to Census



CHECK BREAKDOWN:

TREND CHECKS

STREAMING SECTOR TRENDS

- The number of streaming video platforms that consumers feel is appropriate to pay monthly across all streaming platforms is at series highs.
- The total amount that consumers view as appropriate to spend on streaming video services has been holding flat in the last few months but is lower relative to the start of the year.
- Feedback toward ESPN and sports watching improved sequentially. The amount sports watchers would be willing to pay to stream live sports if they did not have access to cable TV continues to increase.

NETFLIX PRICING SENTIMENT

Netflix subscribers remain generally satisfied with Netflix’s value proposition, but readings have continued to grind lower with each wave we run. This quarter, the % of former subscribers who cancelled because of price increased.

COMPETITIVE DYNAMICS

Respondents mostly view competitors of Netflix as additive, not replacement. Furthermore, among the gen pop audience, Netflix ranks at the top when it comes to upcoming content expectations. We would also flag, though, that Discovery+ and Disney+ subscribers offer especially strong sentiment scores toward pricing value and content in our survey.

AD SUPPORTED TIERS, A POSSIBLE SHARING SURCHARGE, AND MOBILE GAMES

16.1% of consumers who do not watch Netflix would be likely or very likely to sign up for a cheaper ad-supported tier (stronger demand relative to all other peers tested). We would also note that there is a good amount of willingness to pay an account surcharge fee on behalf of Netflix password sharers and shere-ees. There is modest demand among those who watch Netflix to play mobile games based on shows/characters in the platform (demand for this is actually strongest on this front for Disney+ and Discovery+)

Streaming Wars

AD-SUPPORTED TIERS

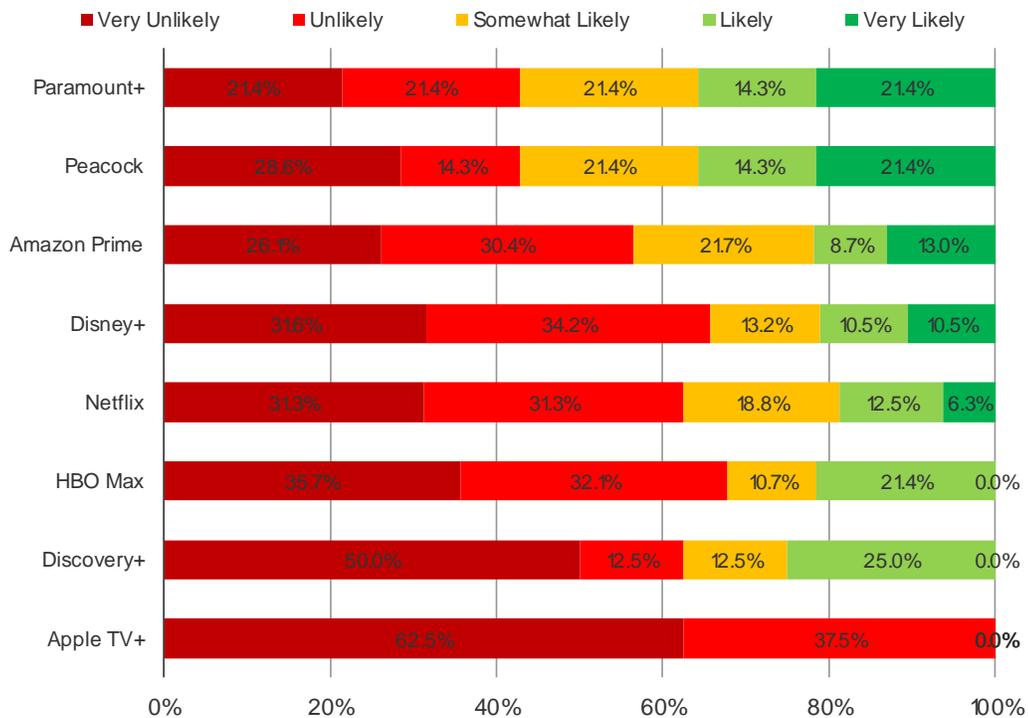
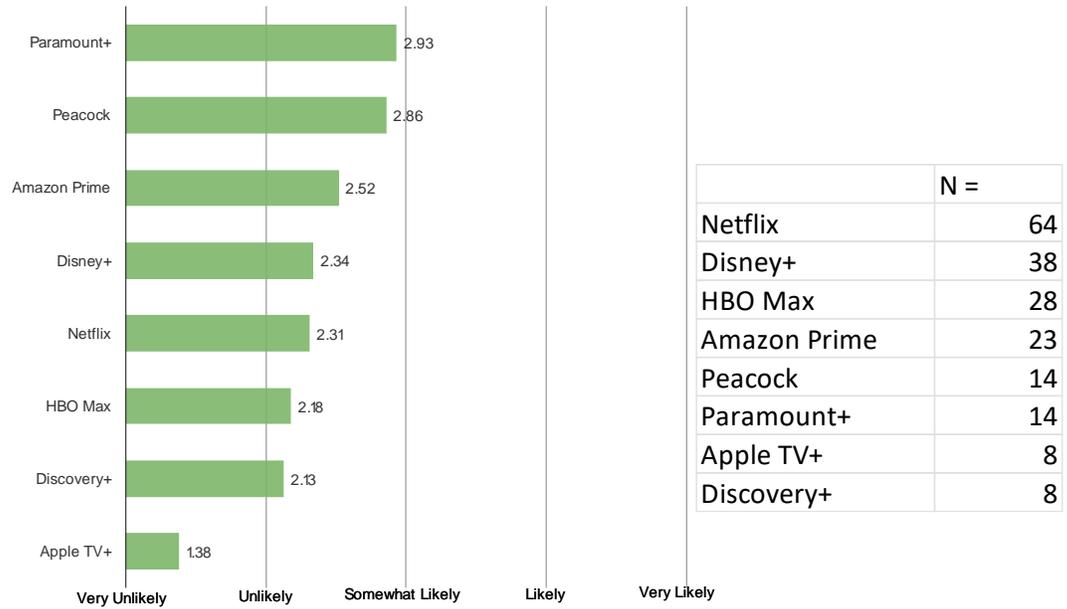
HOW LIKELY WOULD YOU BE TO SUBSCRIBE TO AN AD-SUPPORTED VERSION OF THIS PLATFORM, WITH COMMERCIALS, FOR A LOWER PRICE THAN ITS TYPICAL SUBSCRIPTION PRICE?

Posed to respondents who DO NOT use each of the following to watch video content at home.



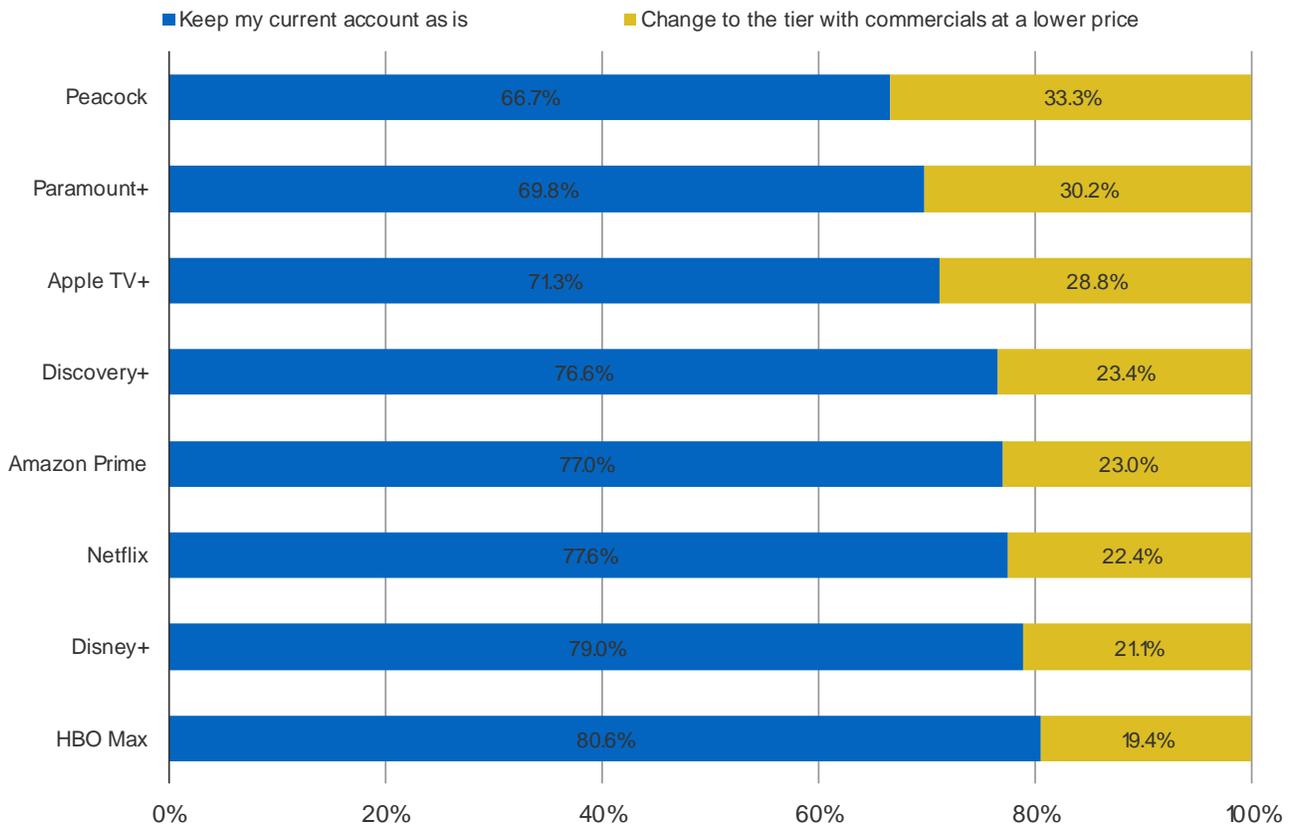
HOW LIKELY WOULD YOU BE TO SIGN UP FOR YOUR OWN ACCOUNT IF THIS PLATFORM OFFERED AN AD-SUPPORTED TIER, WITH COMMERCIALS, FOR A LOWER PRICE THAN ITS TYPICAL PRICE?

Posed to respondents who access each of the following via someone’s log-in who they do not live with.



IF THE FOLLOWING OFFERED AN AD-SUPPORTED TIER, WITH COMMERCIALS, FOR A LOWER PRICE, WOULD YOU...

Posed to all respondents who pay for access to the following themselves.



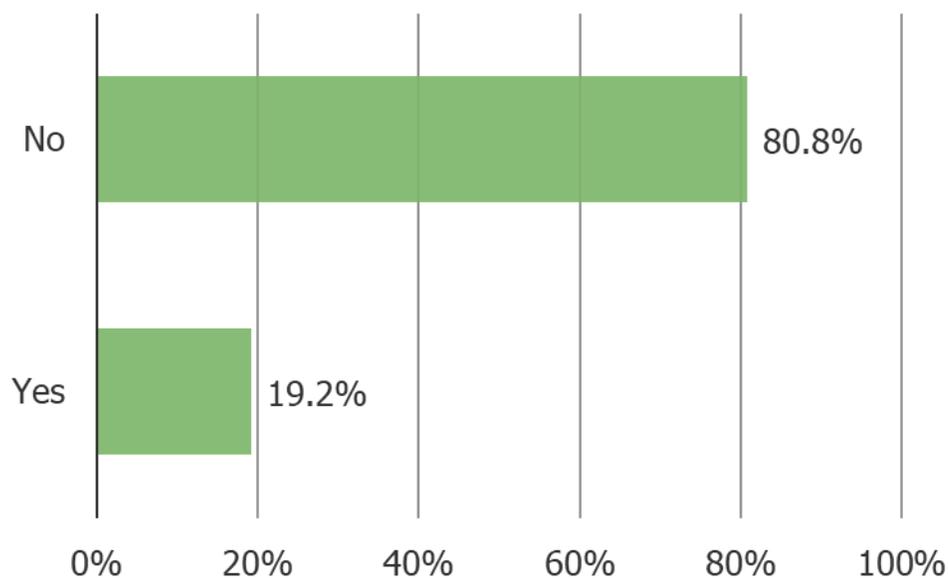
	N =
Netflix	406
Amazon Prime	383
Disney+	209
HBO Max	175
Peacock	174
Paramount+	126
Apple TV+	80
Discovery+	64

Streaming Wars

NFLX ACCOUNT SHARING AND POSSIBLE SURCHARGE

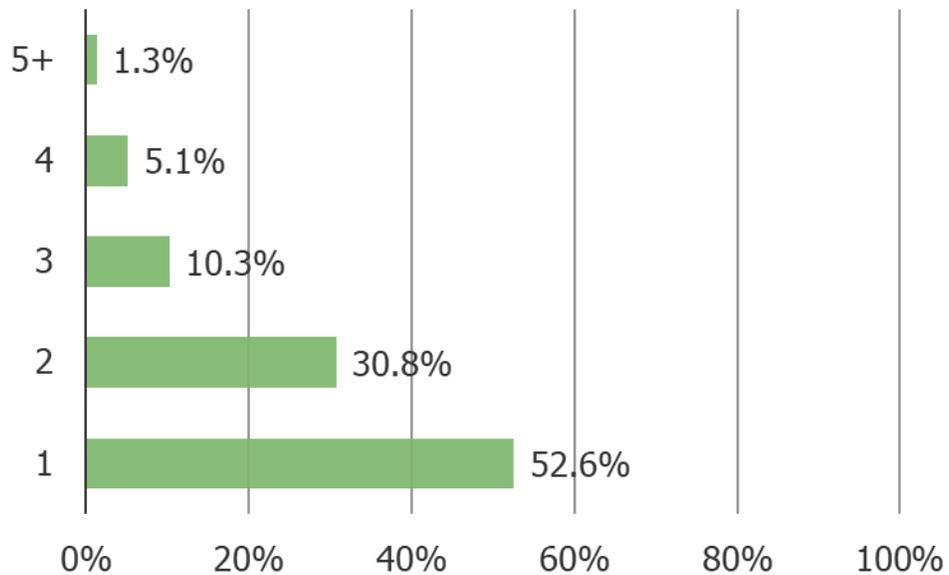
DO YOU LET ANYONE LIVING OUTSIDE OF YOUR HOUSEHOLD USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix (N = 406).



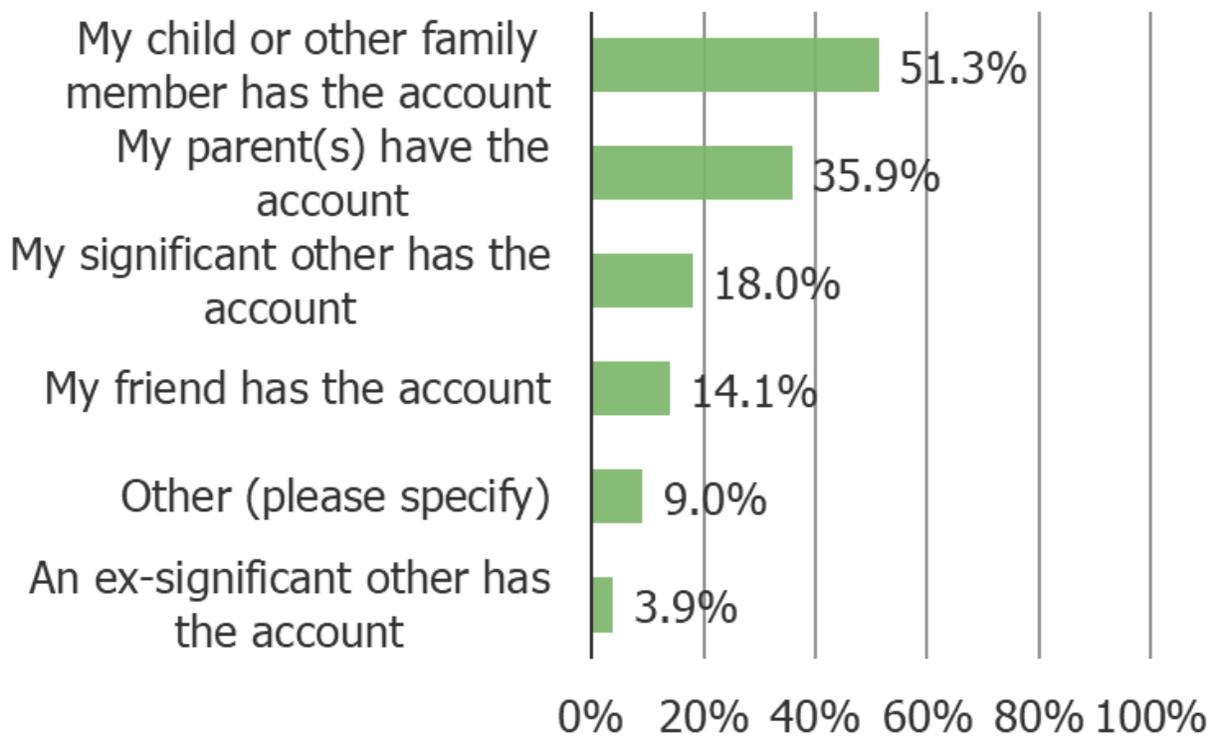
HOW MANY PEOPLE WHO LIVE OUTSIDE OF YOUR HOUSEHOLD DO YOU LET USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 78).



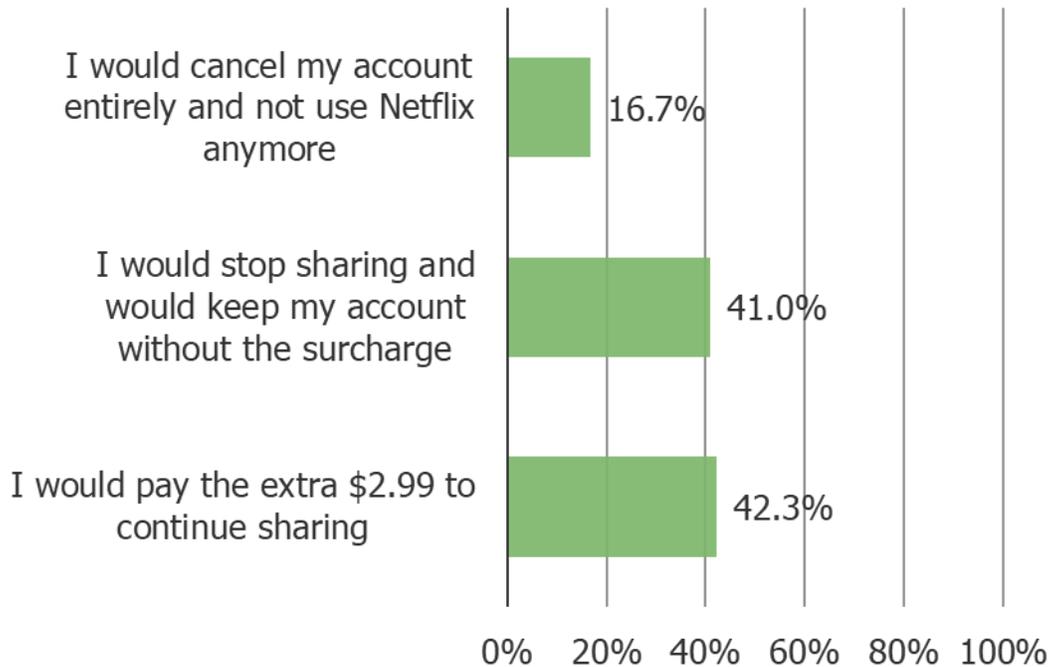
HOW MANY PEOPLE WHO LIVE OUTSIDE OF YOUR HOUSEHOLD DO YOU LET USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 78).



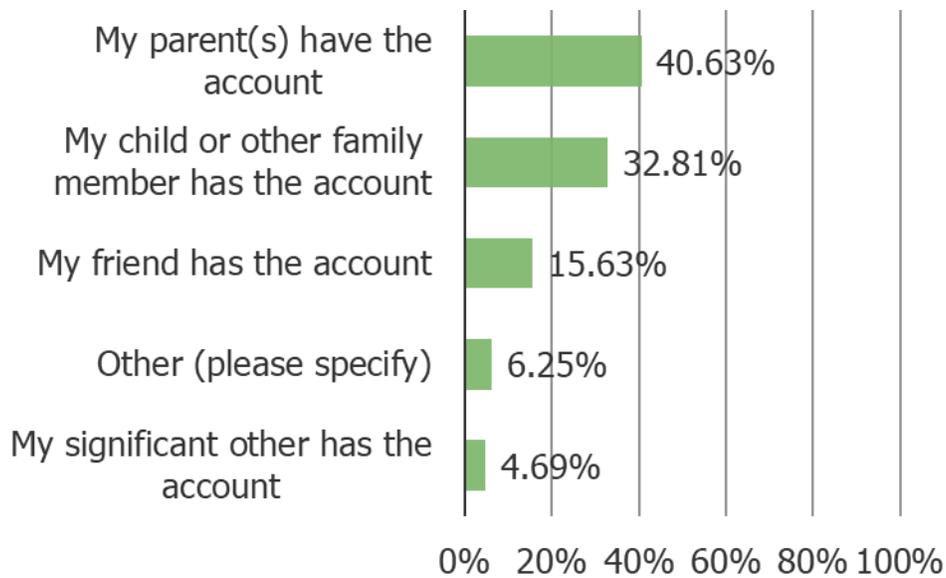
WHAT WOULD YOU DO IF NETFLIX DID NOT ALLOW YOU TO SHARE YOUR ACCOUNT WITH OTHERS AND GAVE YOU THE OPTION TO PAY A \$2.99 MONTHLY SURCHARGE TO CONTINUE SHARING?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 78).



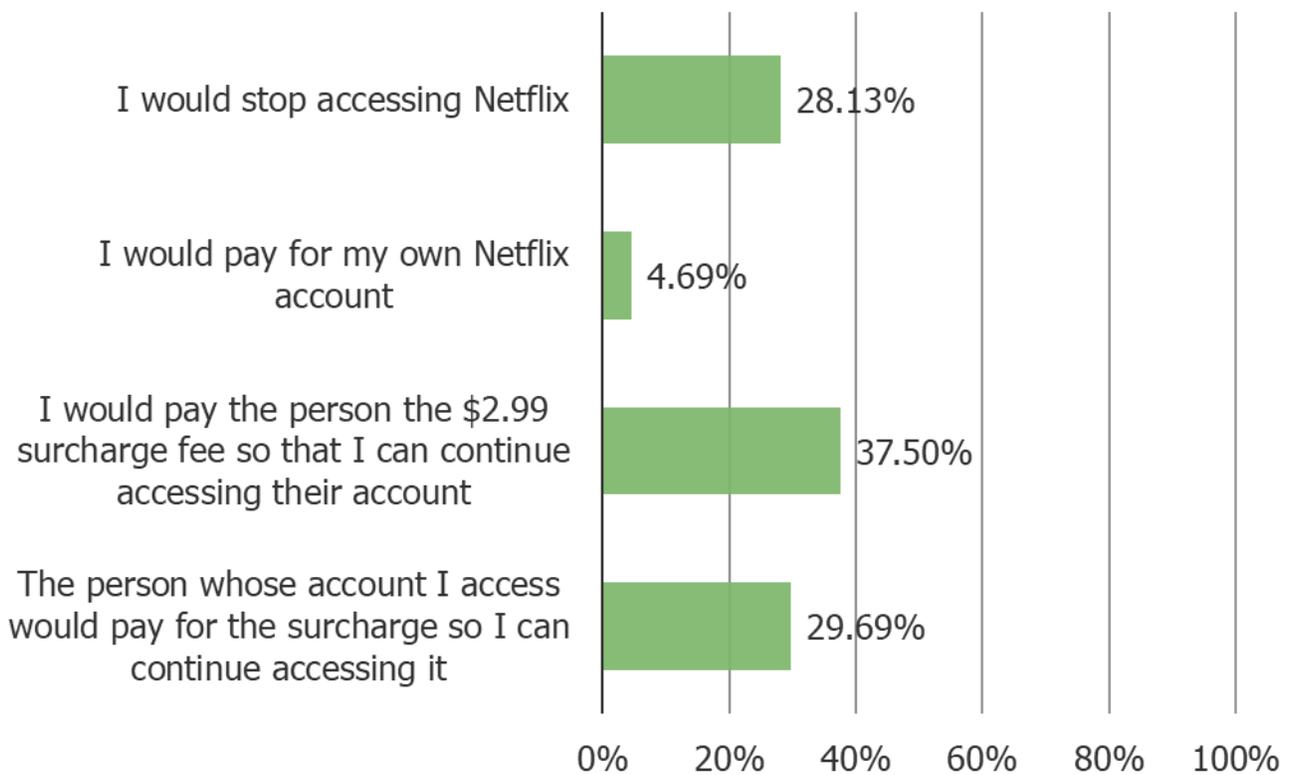
WHAT IS YOUR RELATION TO THE PERSON WHOSE NETFLIX ACCOUNT YOU ACCESS?

Posed to respondents who access someone's Netflix account who they do not live with (N = 64).



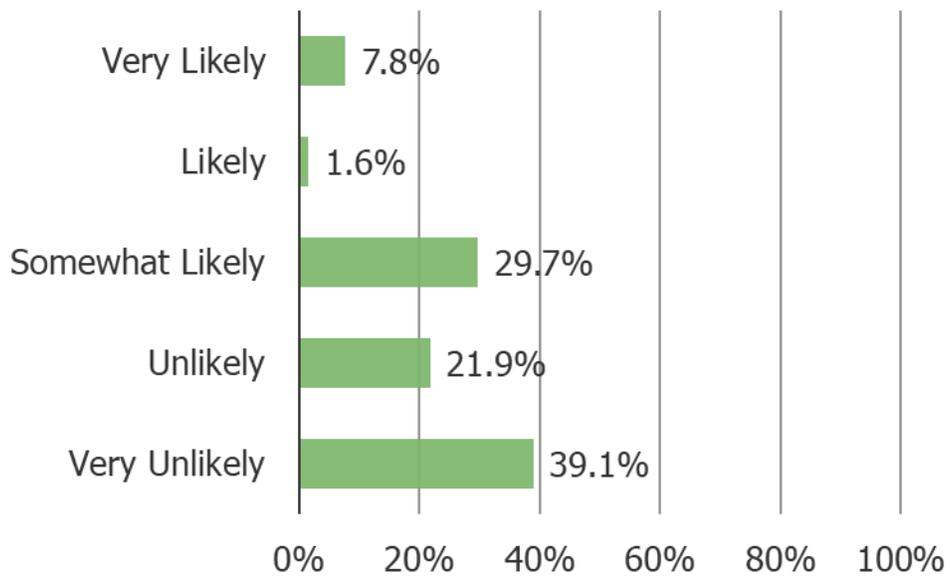
IF NETFLIX REQUIRED THE PERSON WHOSE ACCOUNT YOU ACCESS TO PAY A \$2.99 SURCHARGE FOR YOU TO ACCESS THEIR ACCOUNT, WHAT WOULD HAPPEN?

Posed to respondents who access someone’s Netflix account who they do not live with (N = 64).



IF YOU WERE NOT ABLE TO ACCESS SOMEONE ELSE'S ACCOUNT, HOW LIKELY WOULD YOU BE TO SIGN UP FOR YOUR OWN NETFLIX ACCOUNT FOR \$15.49 PER MONTH?

Posed to respondents who access someone's Netflix account who they do not live with (N = 64).

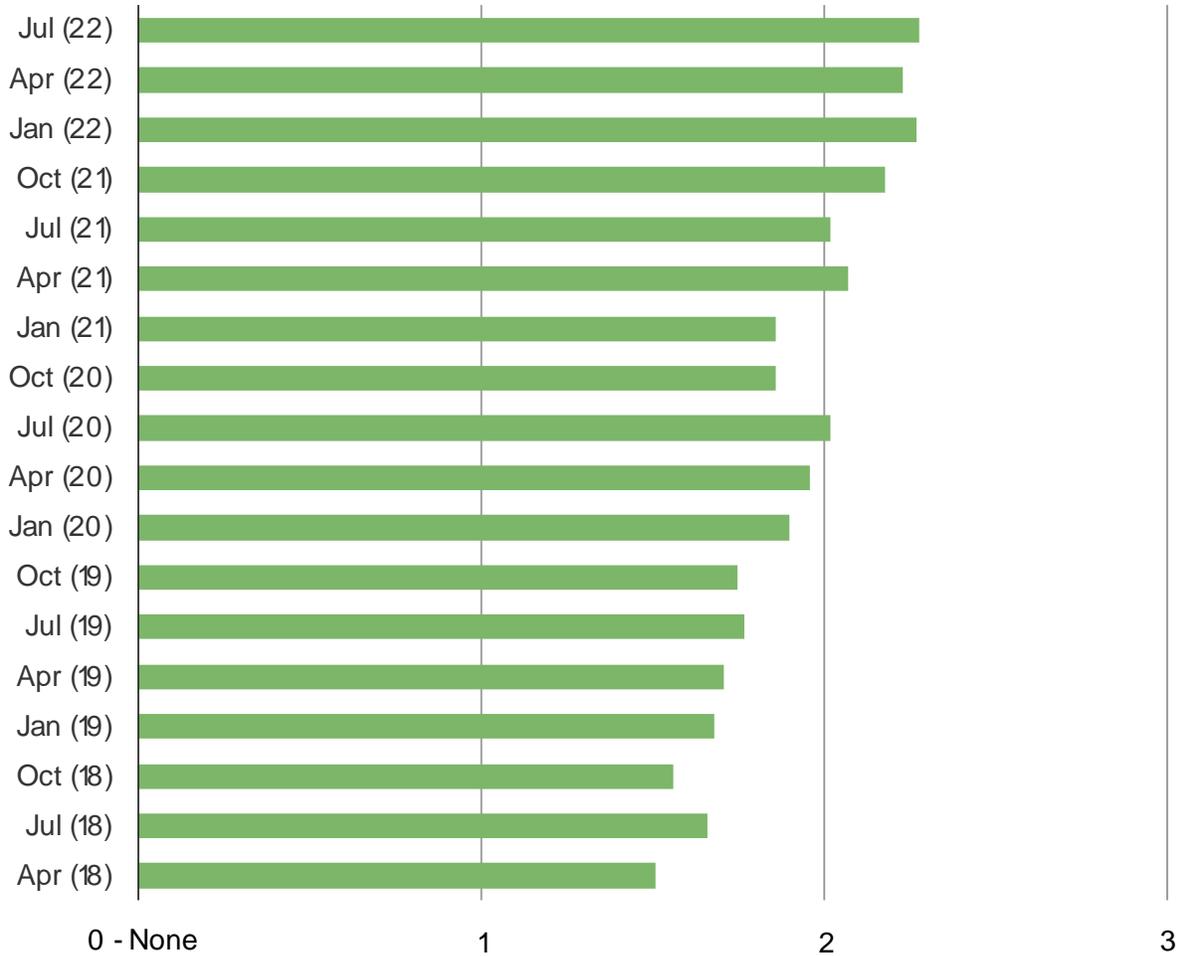


Streaming Wars

STREAMING SECTOR DYNAMICS

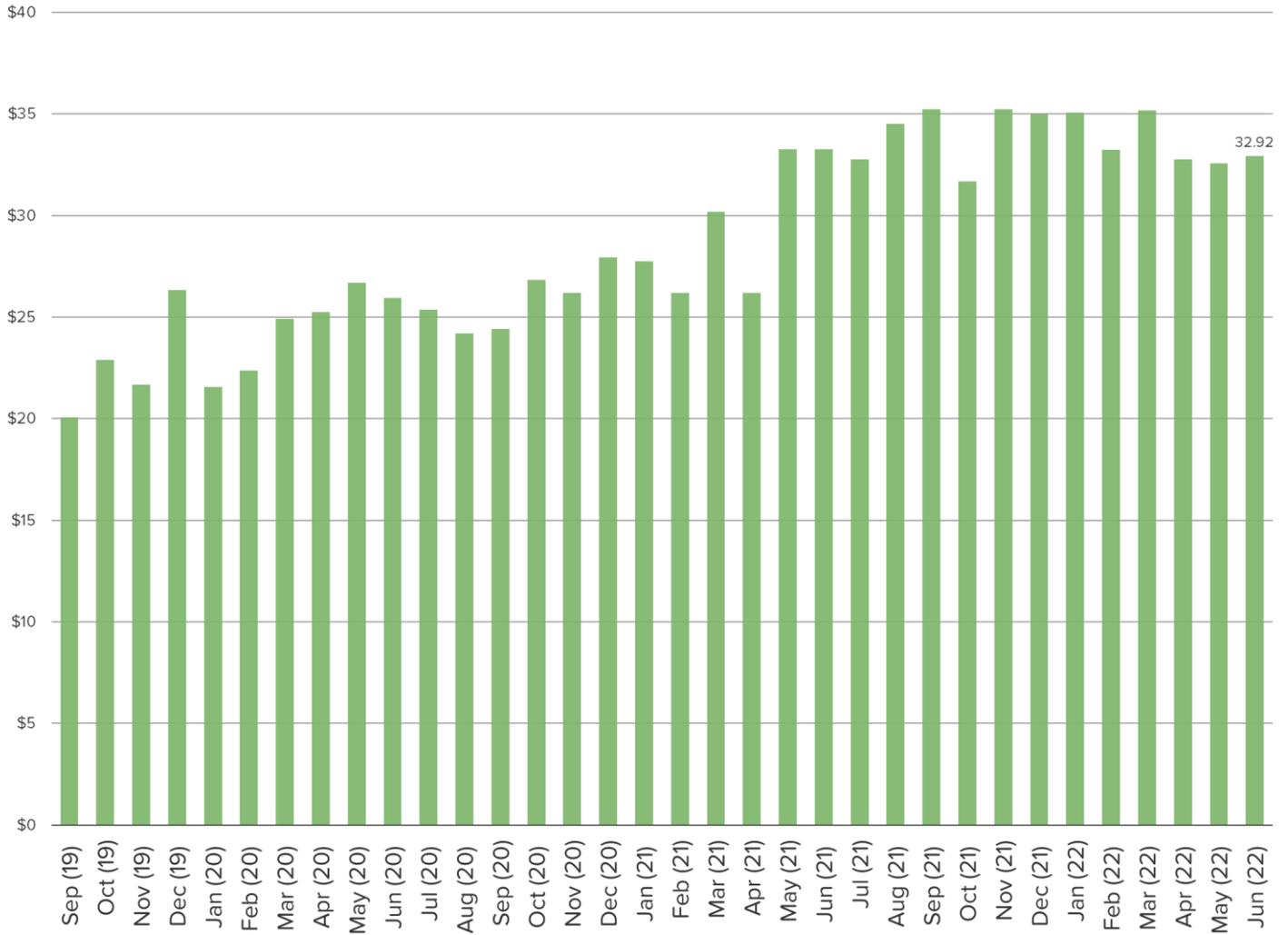
HOW MANY STREAMING VIDEO SERVICES DO YOU THINK IS THE RIGHT NUMBER TO BE PAYING FOR AT THE SAME TIME?

Posed to all respondents.



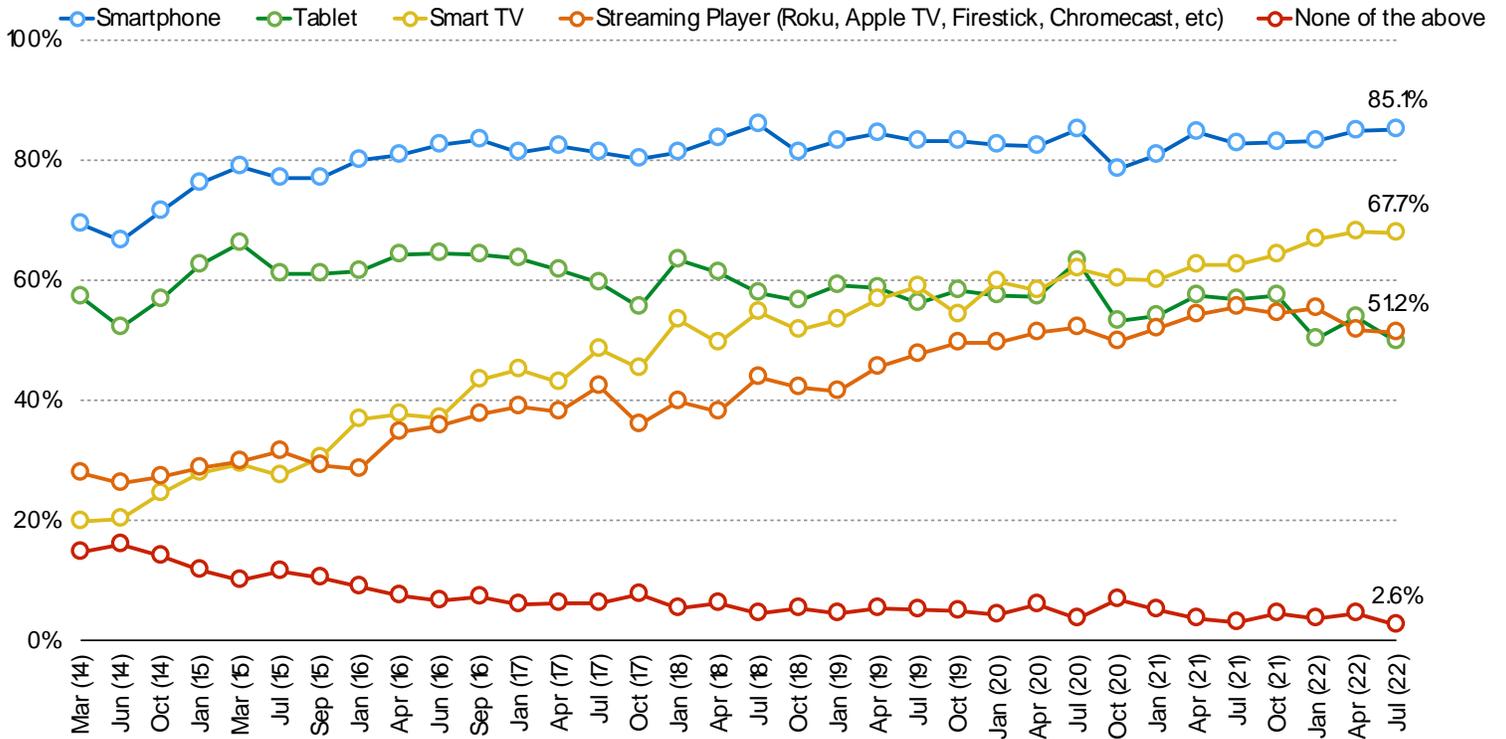
HOW MUCH DO YOU THINK IS APPROPRIATE TO SPEND ON STREAMING VIDEO SERVICES, IN TOTAL, PER MONTH?

Posed to all respondents.



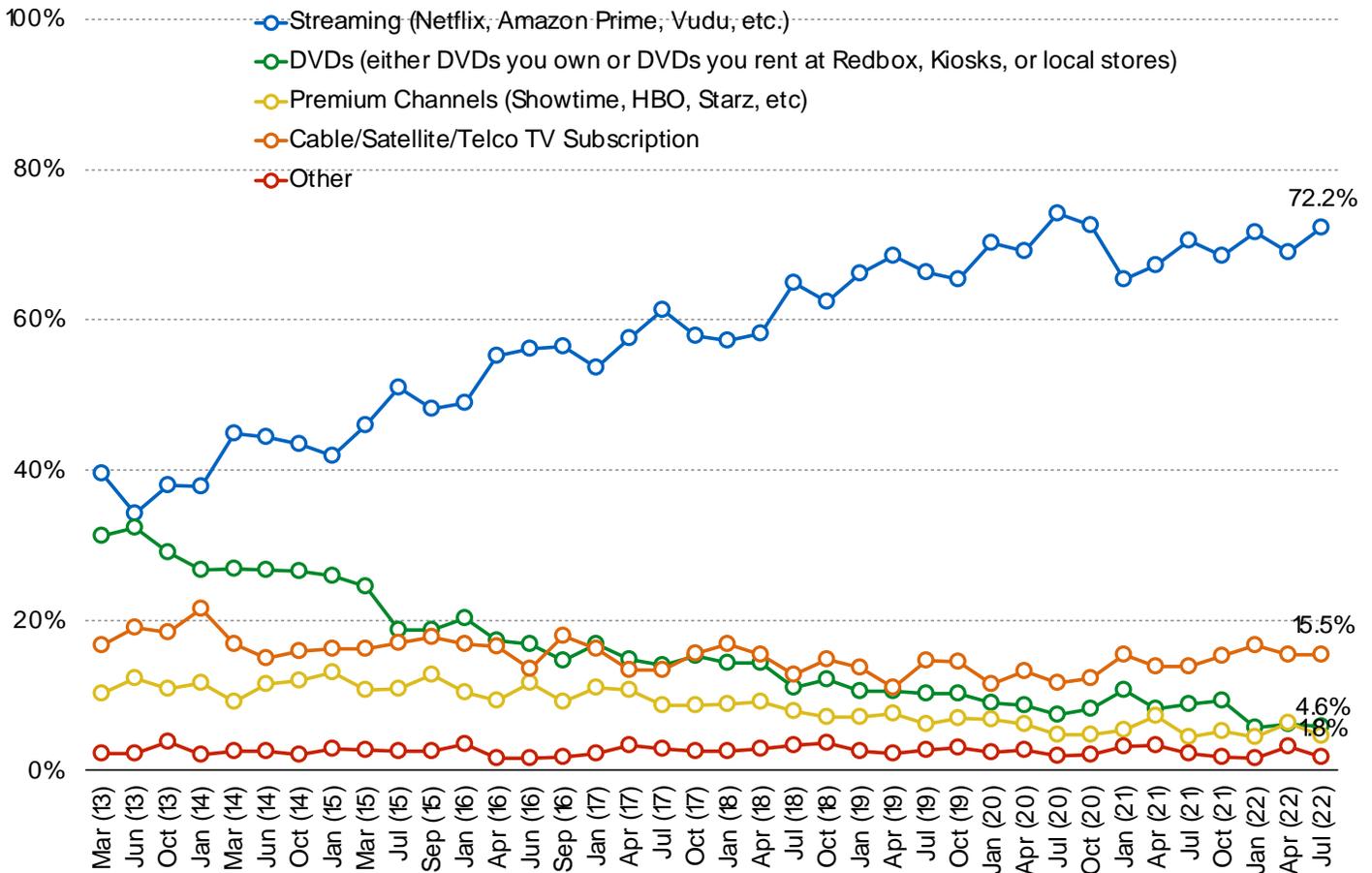
INTERNET CONNECTED DEVICES OWNED BY RESPONDENTS

This question was posed to the target audience.



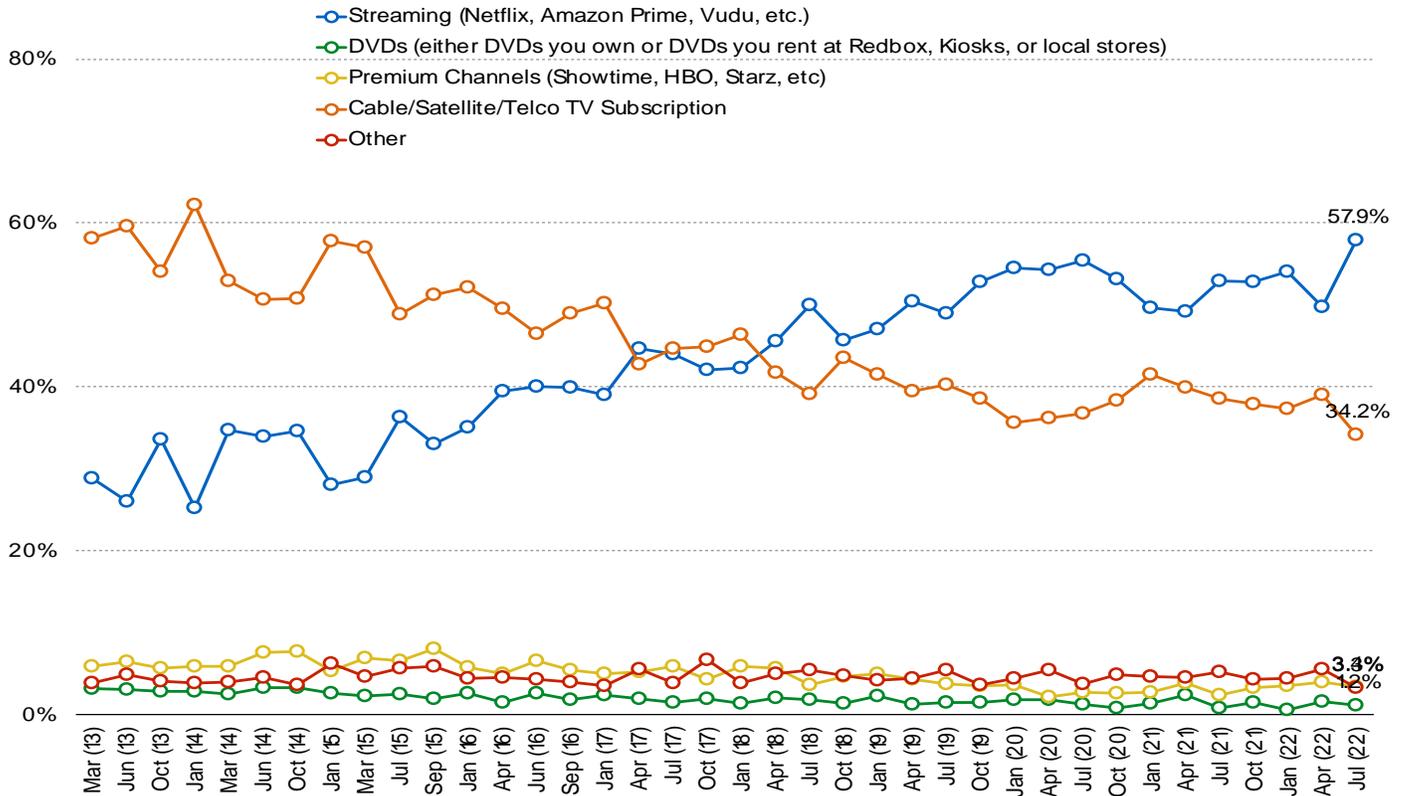
PREFERRED METHOD FOR WATCHING MOVIES

This question was posed to the target audience.



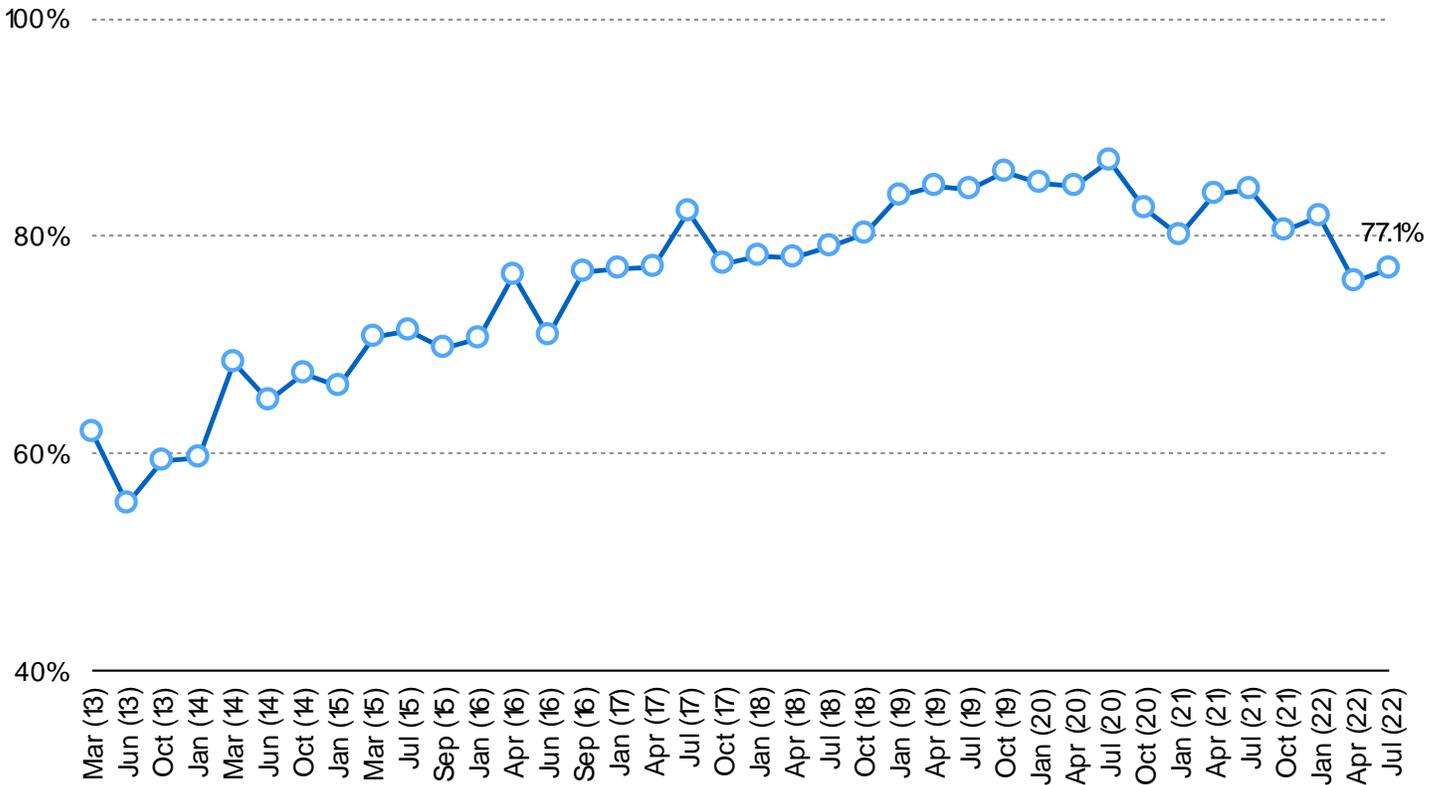
PREFERRED METHOD FOR WATCHING TELEVISION SHOWS

This question was posed to the target audience.



DO YOU SUBSCRIBE TO ANY STREAMING VIDEO SERVICES?

Posed to respondents who watch movies and TV shows at home.

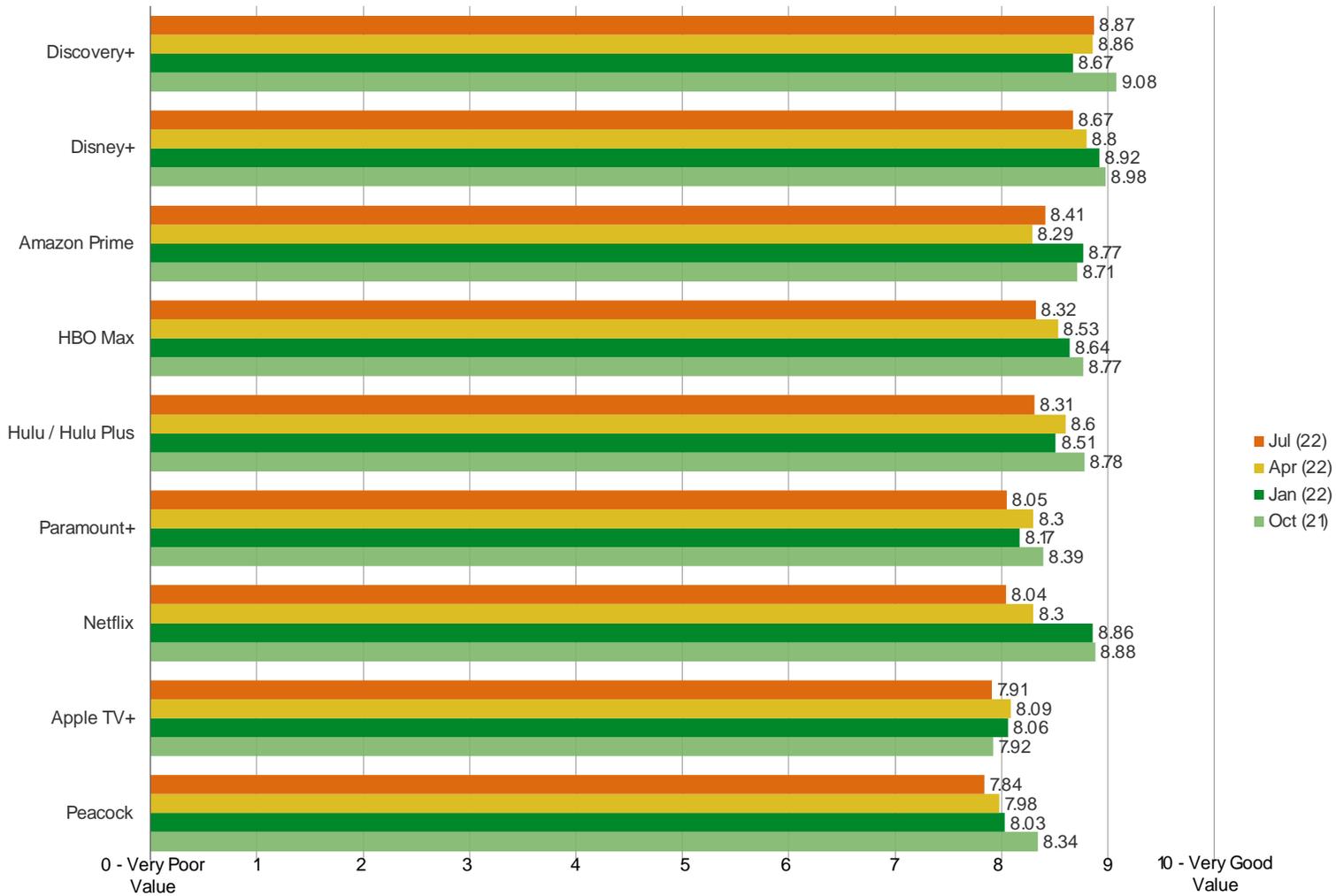


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STREAMING PLATFORMS – COMPETITIVE DYNAMICS

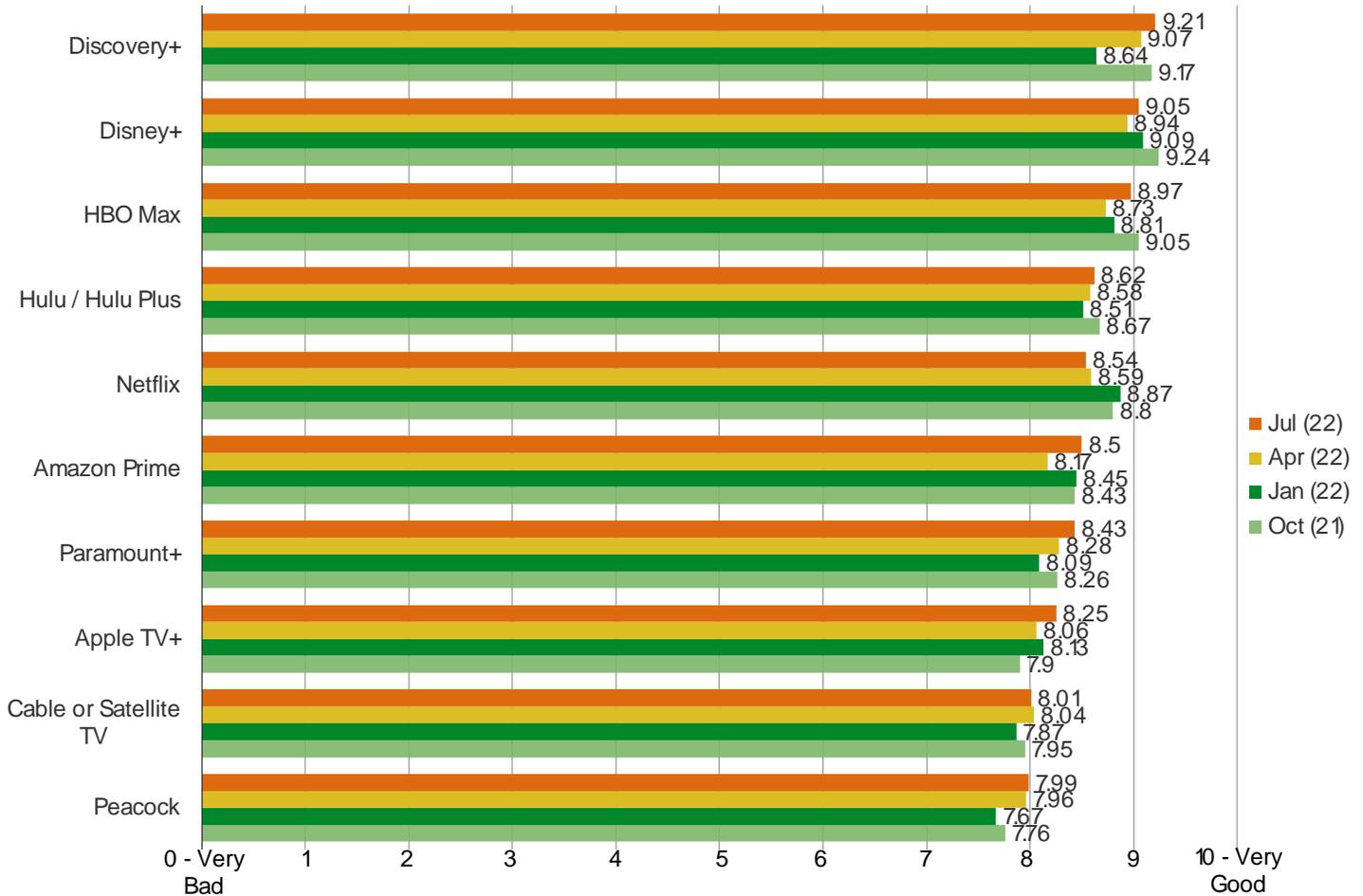
HOW WOULD YOU RATE THE VALUE THIS SERVICE OFFERS RELATIVE TO WHAT IT COSTS?

Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



PLEASE RATE THE CONTENT AVAILABLE ON THE FOLLOWING:

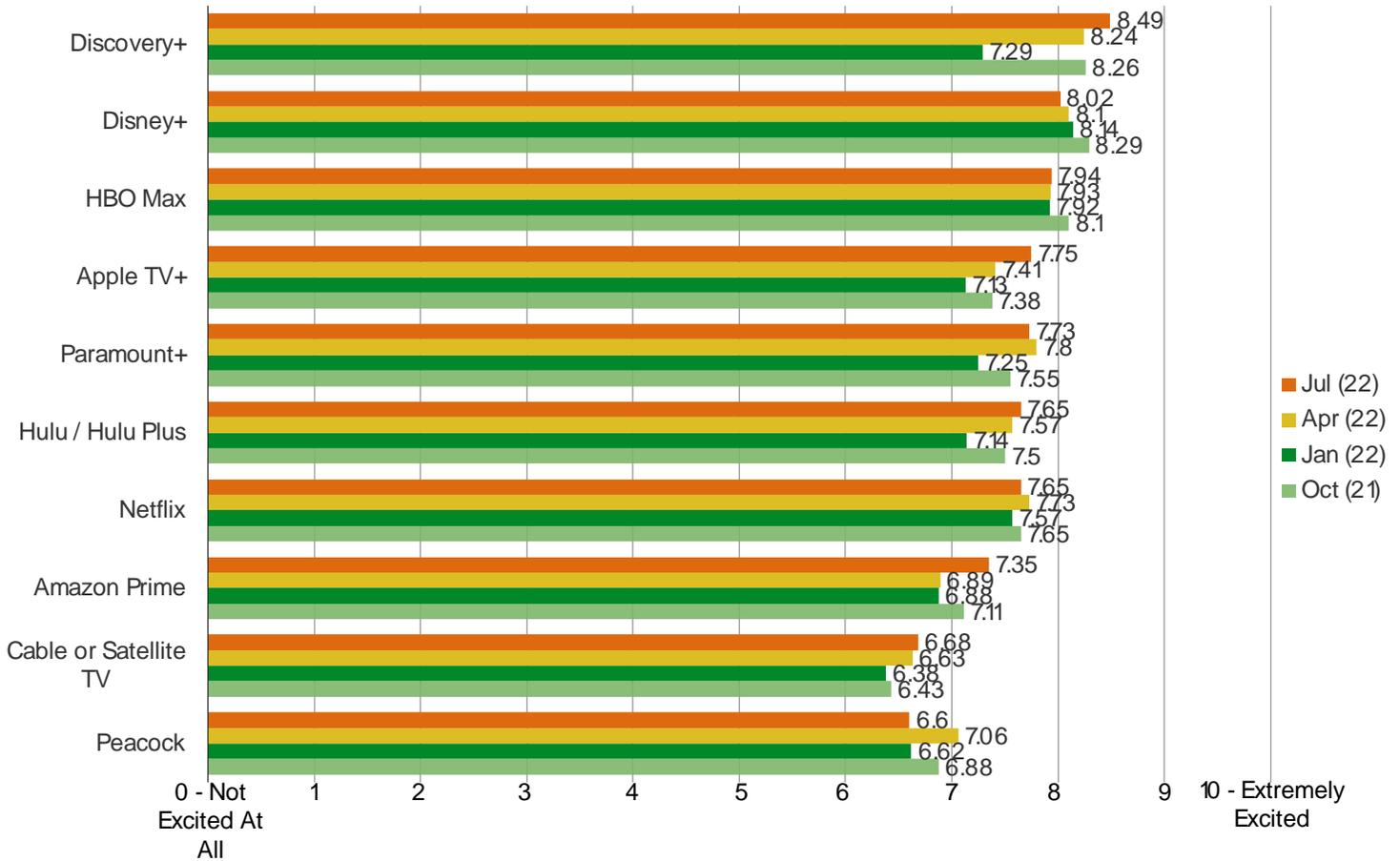
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



	N=
Peacock	218
Cable or Satellite TV	298
Apple TV+	95
Paramount+	168
Amazon Prime	454
Netflix	539
Hulu / Hulu Plus	353
HBO Max	230
Disney+	287
Discovery+	75

PLEASE RATE HOW EXCITED YOU ARE FOR UPCOMING CONTENT (RELEASES IN THE NEXT 3 MONTHS) ON THE FOLLOWING?

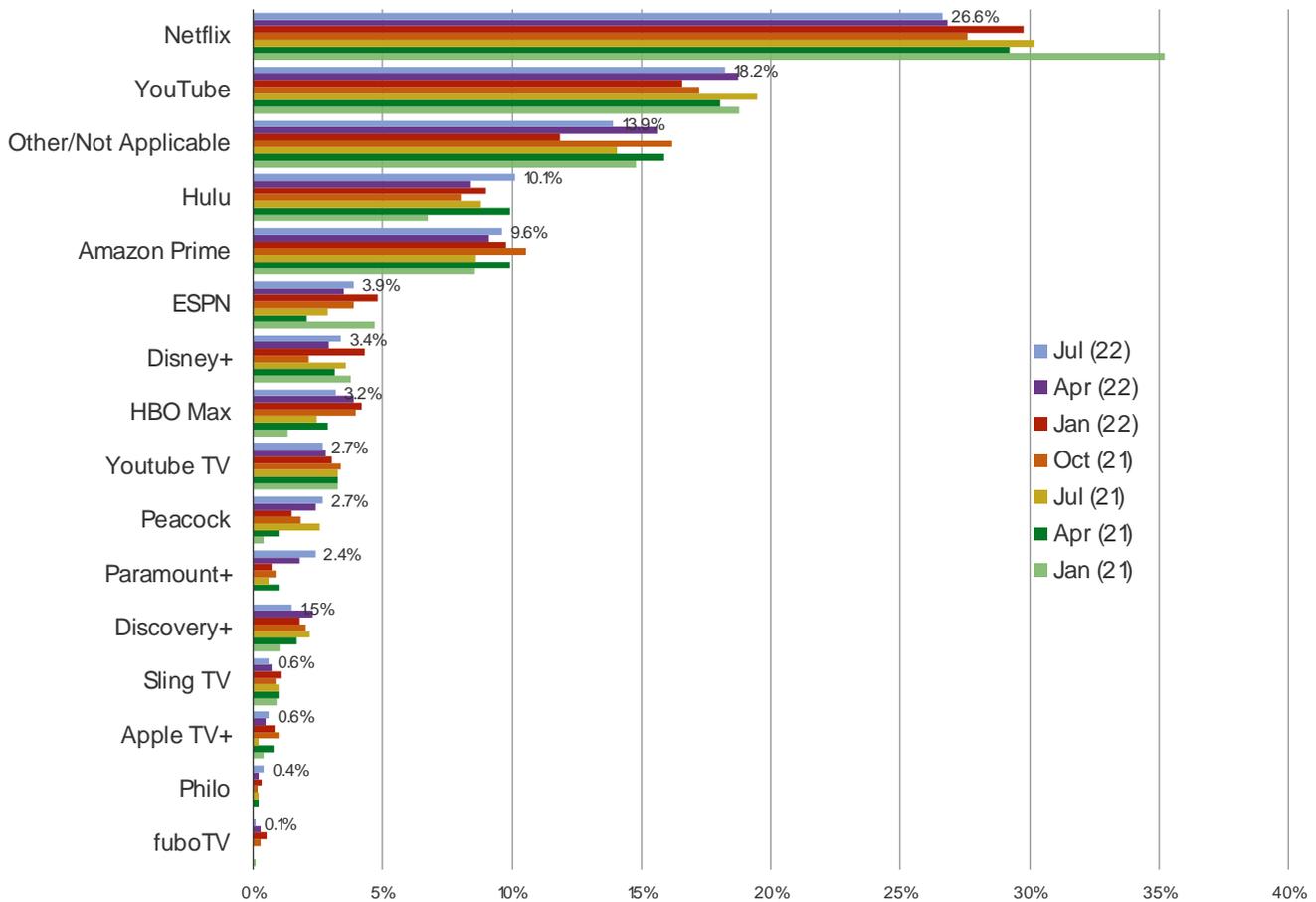
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



	N=
Peacock	218
Cable or Satellite TV	298
Amazon Prime	454
Netflix	539
Hulu / Hulu Plus	353
Paramount+	168
Apple TV+	95
HBO Max	230
Disney+	287
Discovery+	75

WHICH NETWORKS/SERVICES DO RESPONDENTS WATCH MOST OFTEN?

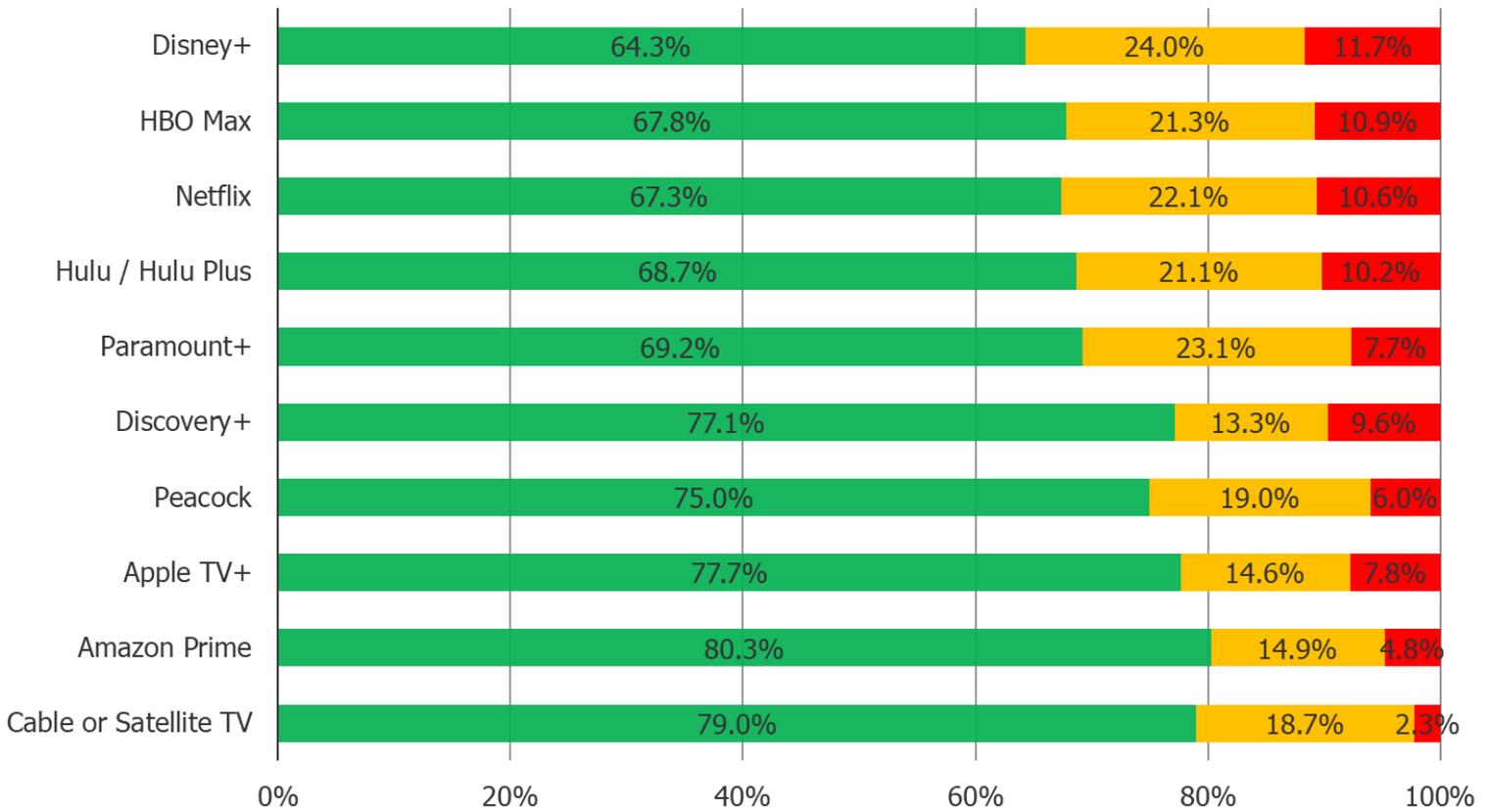
This question was posed to the target audience – respondents who watch some form of video on demand at home (~80% of all respondents balanced to US census).



WHICH BEST DESCRIBES YOUR USAGE OF THE FOLLOWING:

Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.

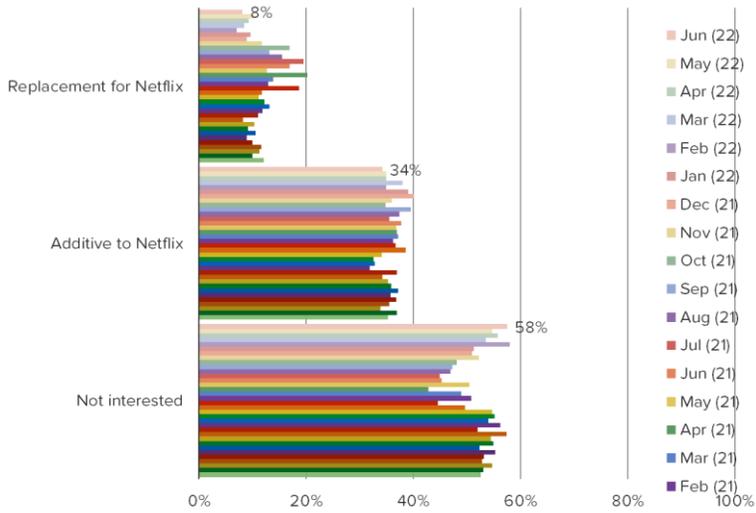
- I pay for this service myself
- I live with someone who pays for this service
- I access this service via someone's log-in who I don't live with



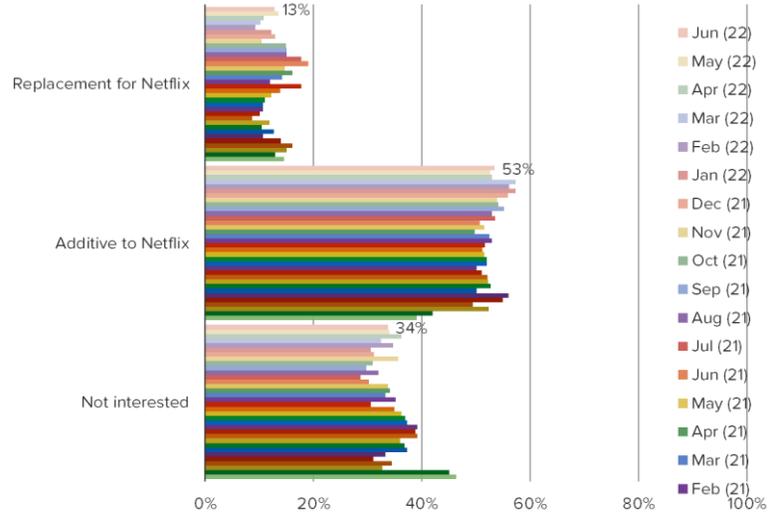
WOULD YOU VIEW THE FOLLOWING TO BE ADDITIVE OR A REPLACEMENT OF NETFLIX?

Posed to Netflix subscribers.

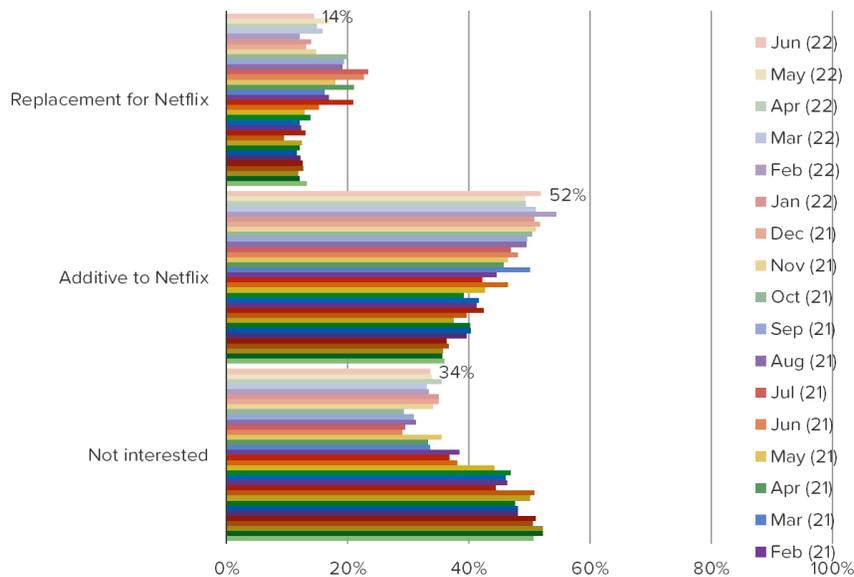
Apple TV+



Disney+



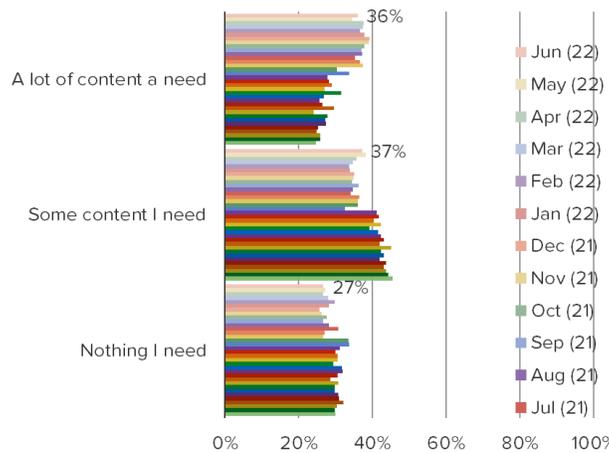
HBO Max



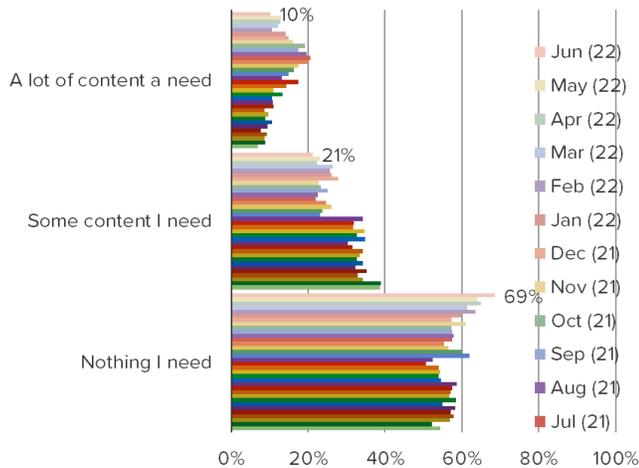
WHAT ARE YOUR EXPECTATIONS FOR THE CONTENT THAT WILL BE ON EACH OF THESE PLATFORMS GOING FORWARD?

Posed to all respondents.

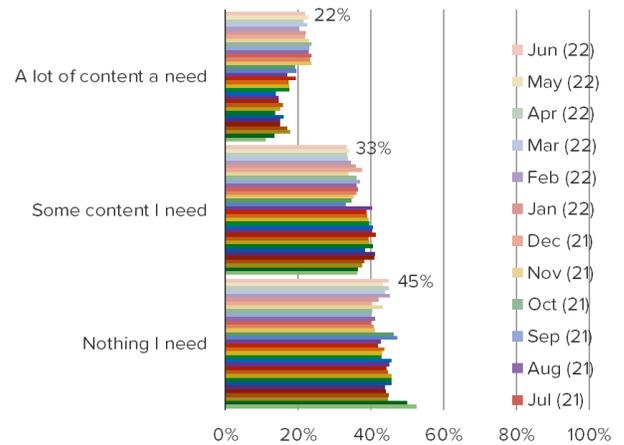
Netflix



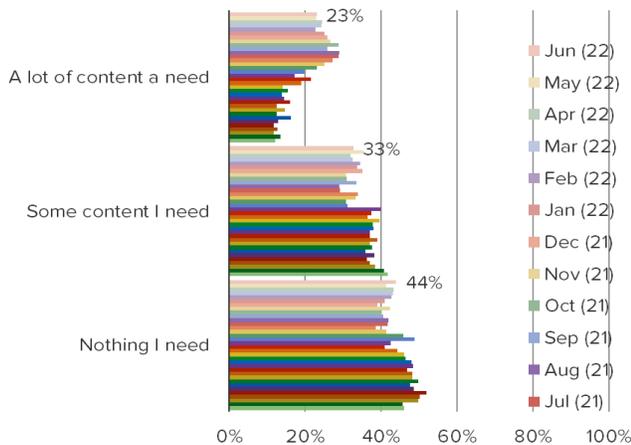
Apple TV+



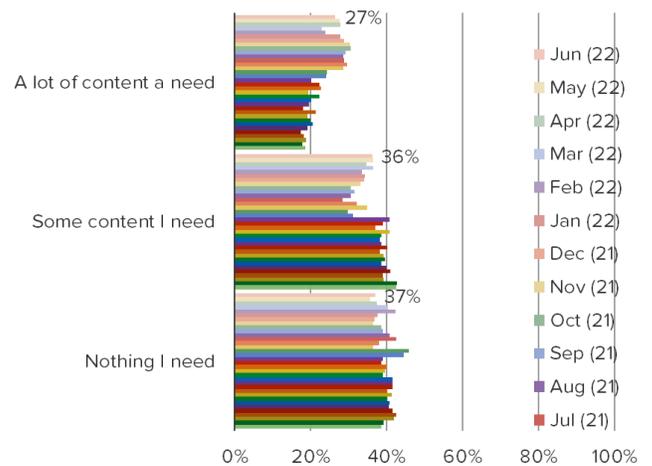
Disney+



HBO Max

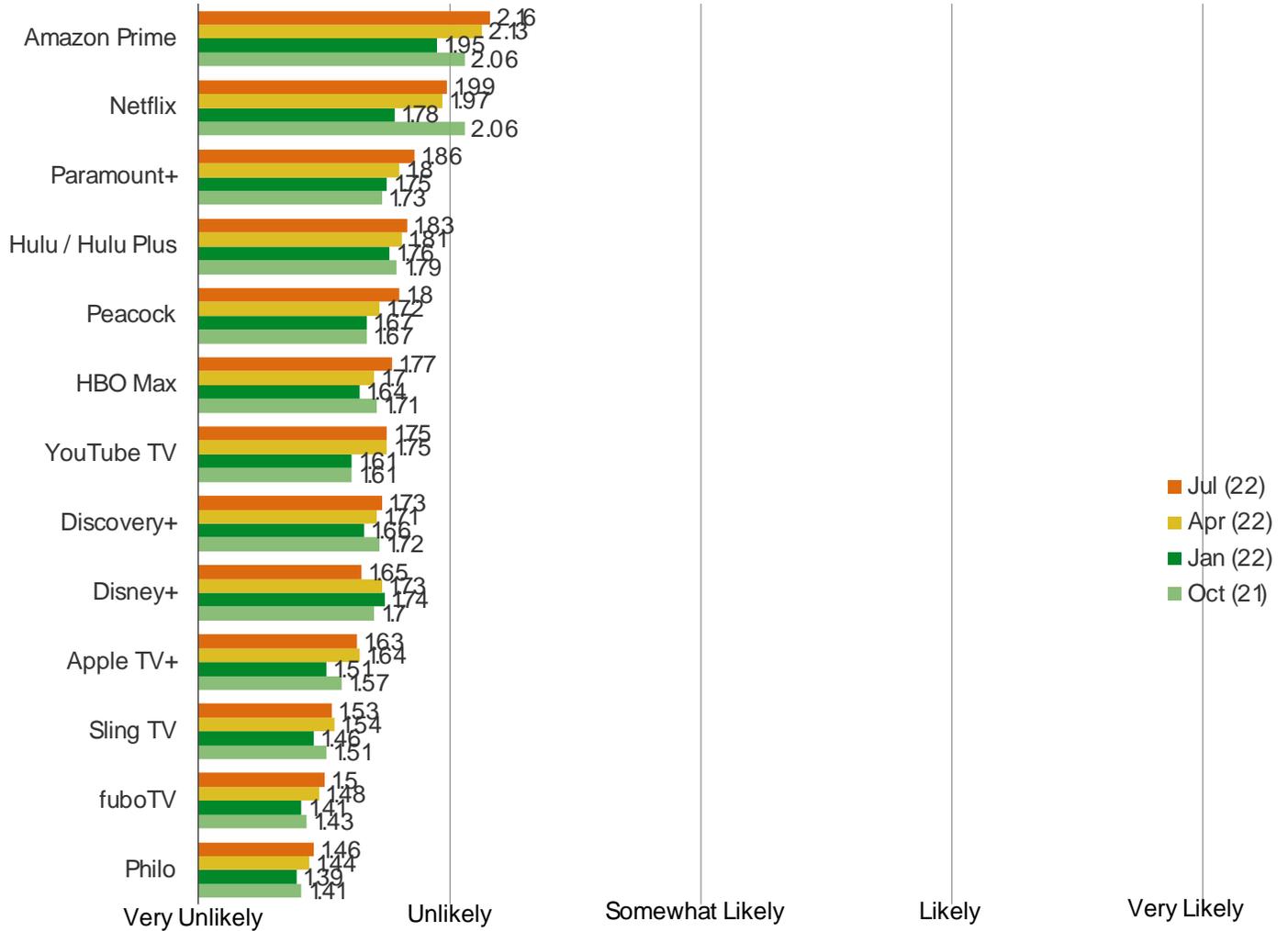


Hulu



HOW LIKELY ARE YOU TO SIGN UP FOR THIS SERVICE IN THE NEXT FEW MONTHS?

Posed to respondents who said they DO NOT currently use the following to watch TV/Movies at home.

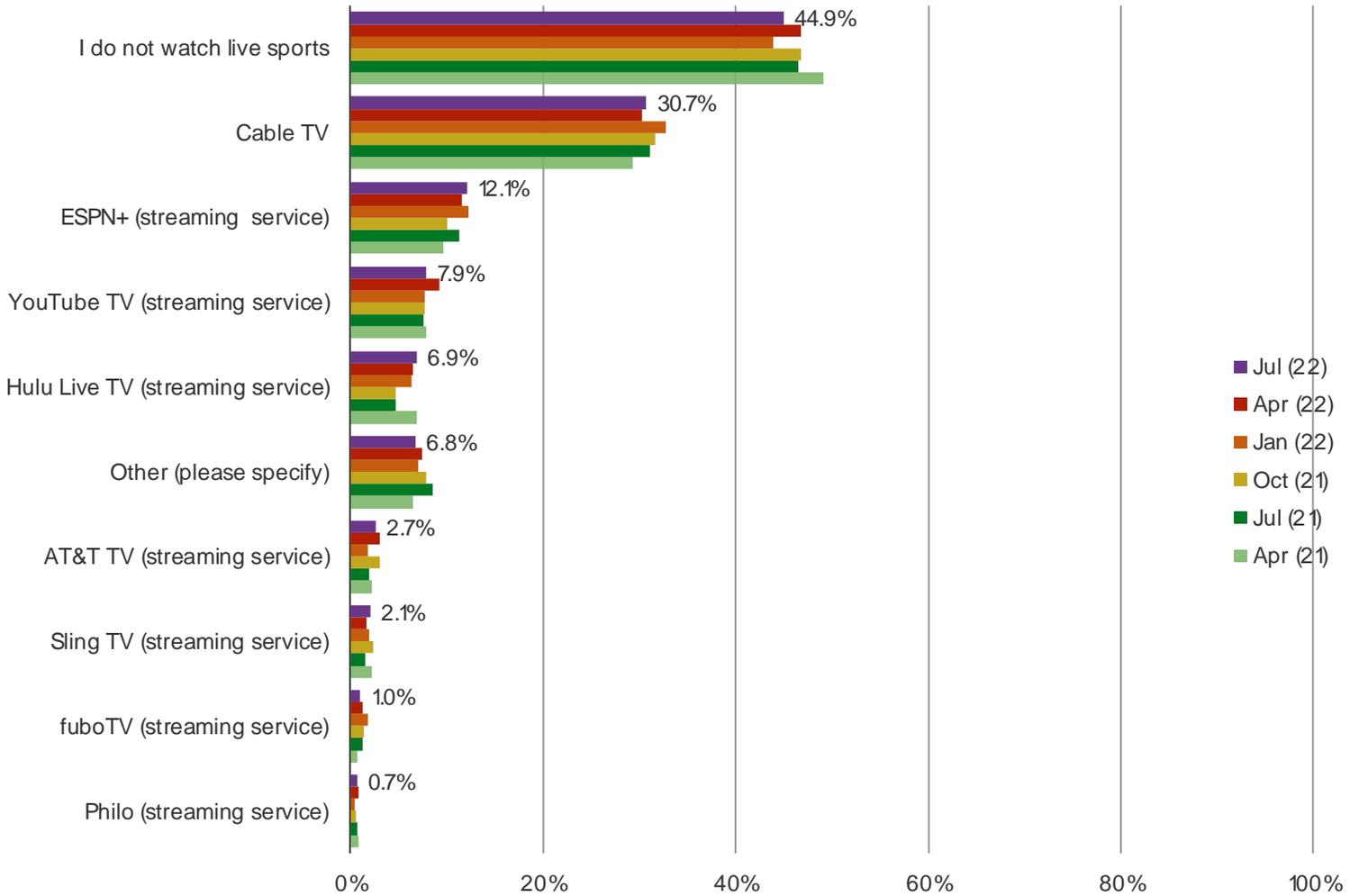


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CABLE TV AND LIVE SPORTS

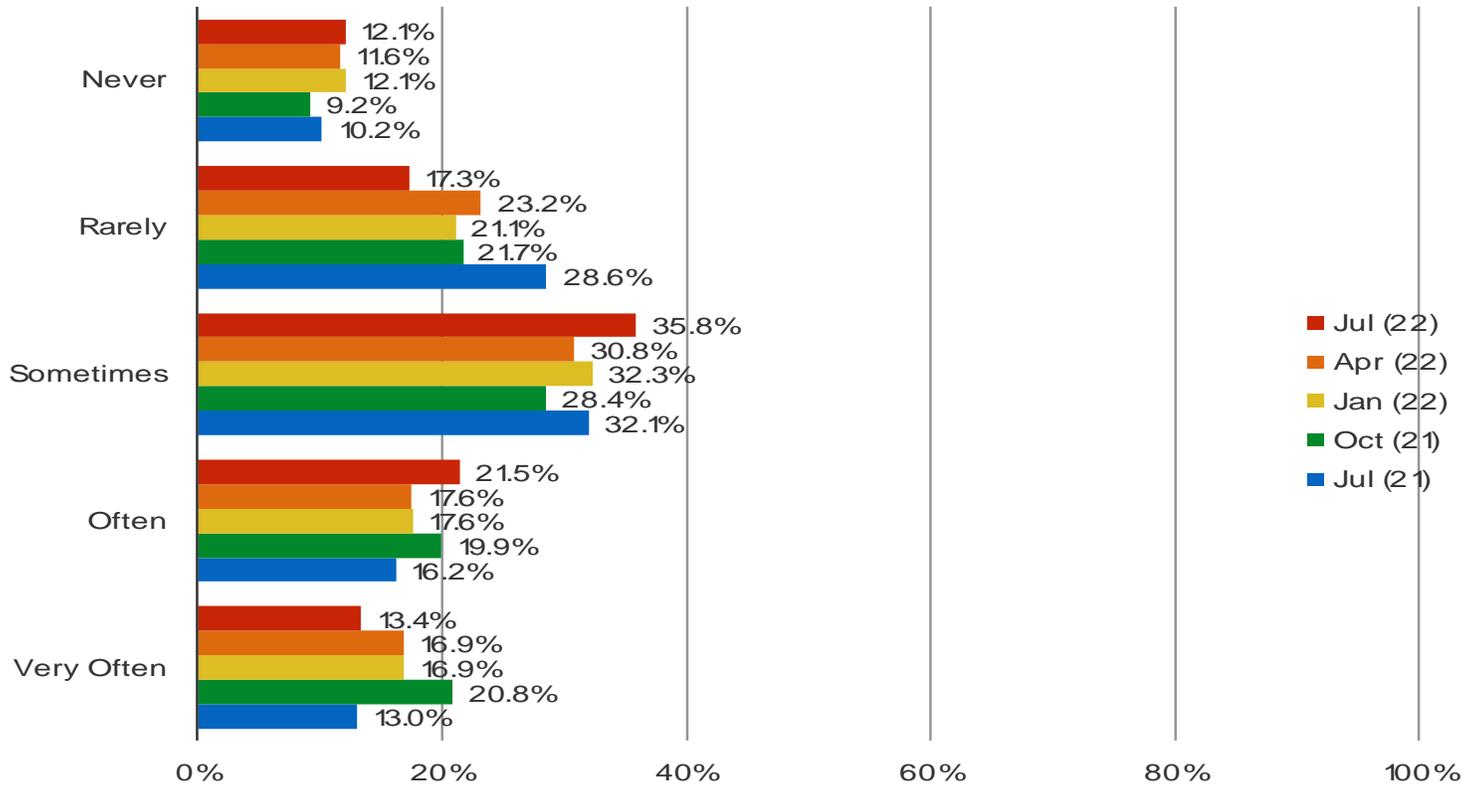
DO YOU USE ANY OF THE FOLLOWING TO WATCH LIVE SPORTS? SELECT ALL THAT APPLY

Posed to all respondents.



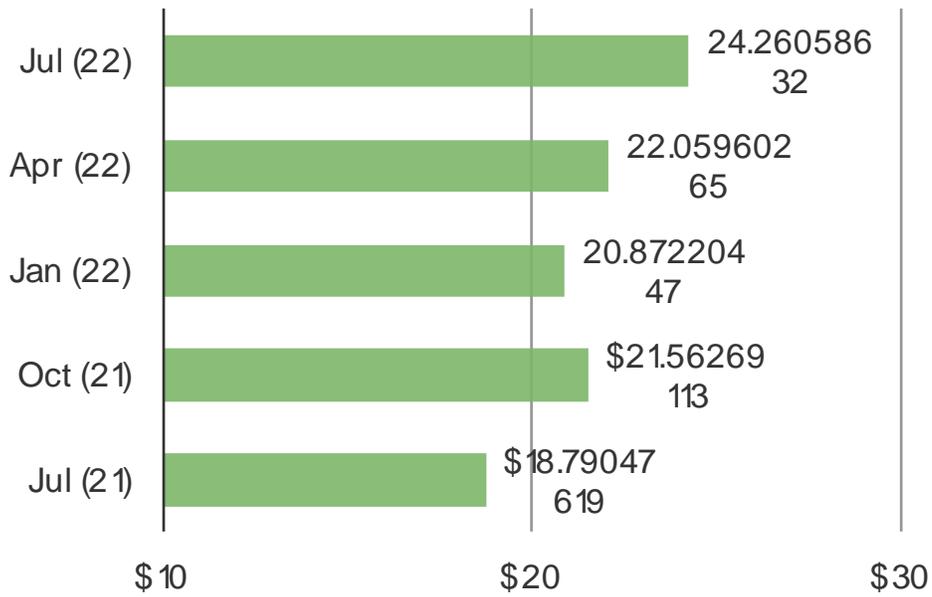
HOW OFTEN DO YOU WATCH ESPN ON CABLE TV?

Posed to respondents who said they watch live sports via cable TV.



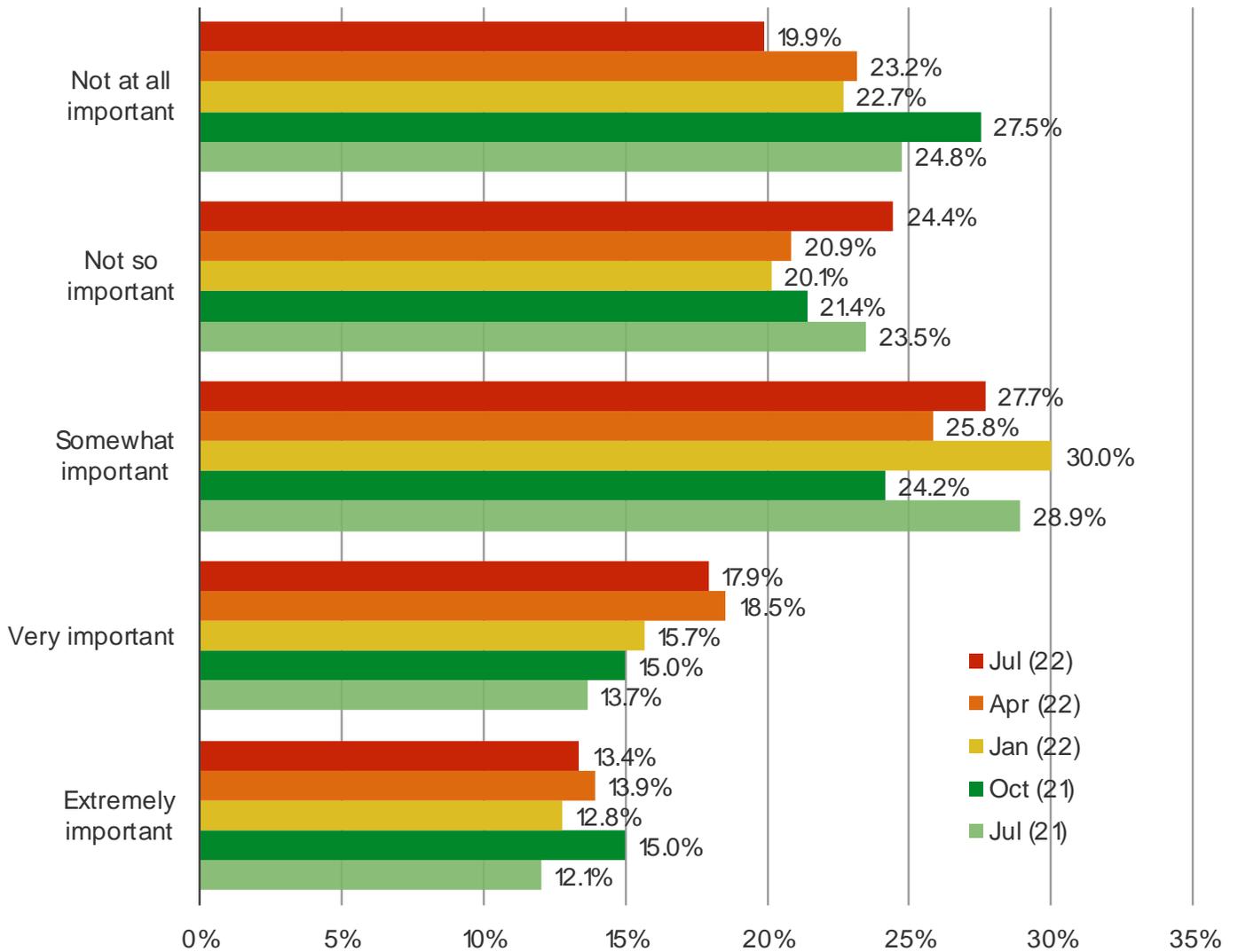
IF YOU DID NOT HAVE CABLE TV, HOW MUCH WOULD YOU BE WILLING TO PAY PER MONTH IN ORDER TO STREAM LIVE SPORTS? (AVERAGE)

Posed to respondents who said they watch live sports via cable TV.



IF YOU DID NOT HAVE CABLE TV, HOW IMPORTANT WOULD IT BE TO YOU TO SUBSCRIBE TO A SERVICE THAT GETS YOU ACCESS TO ESPN LIVE SPORTS COVERAGE?

Posed to respondents who said they watch live sports via cable TV.

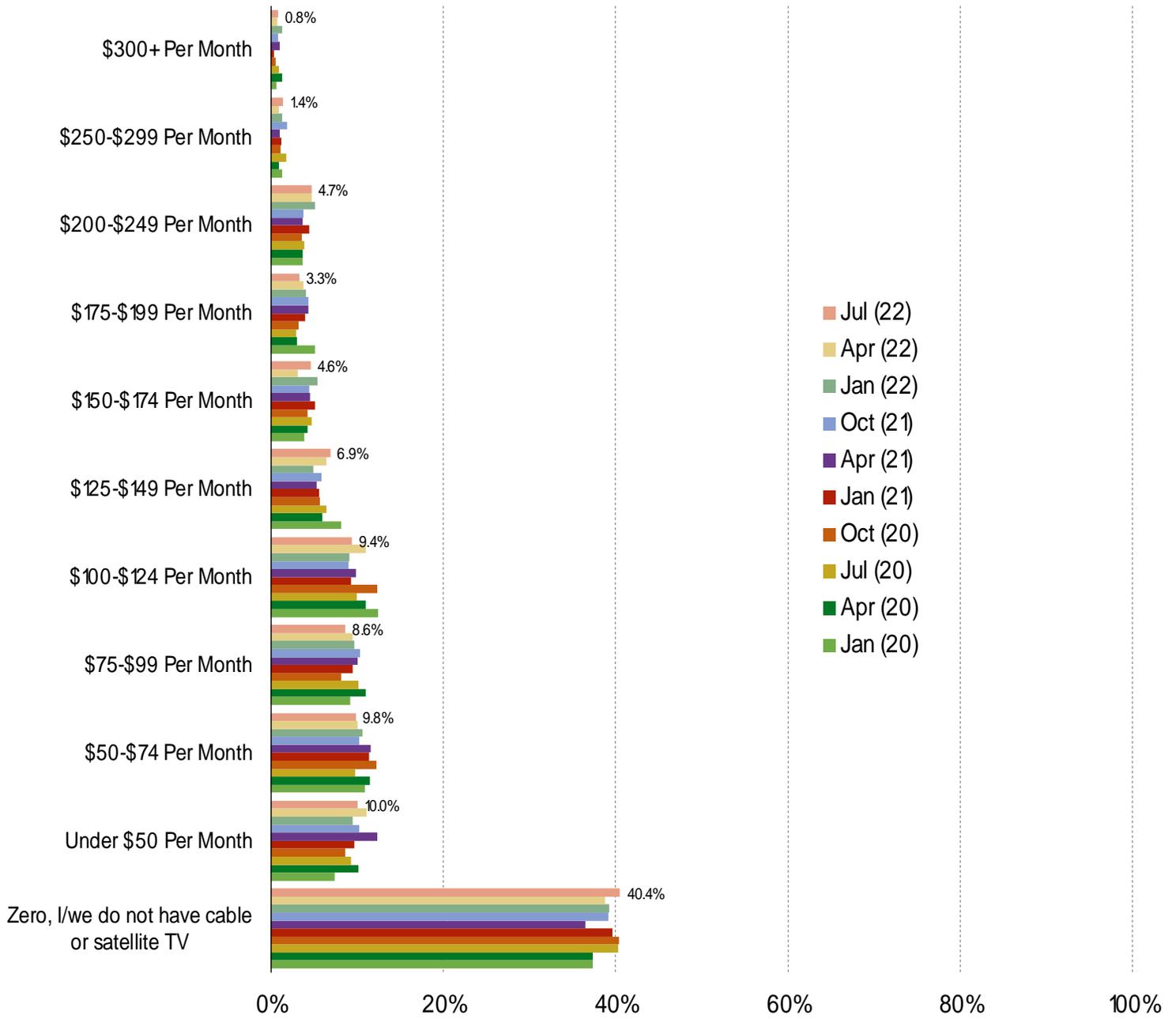


Streaming Wars

SPEND ON CONTENT

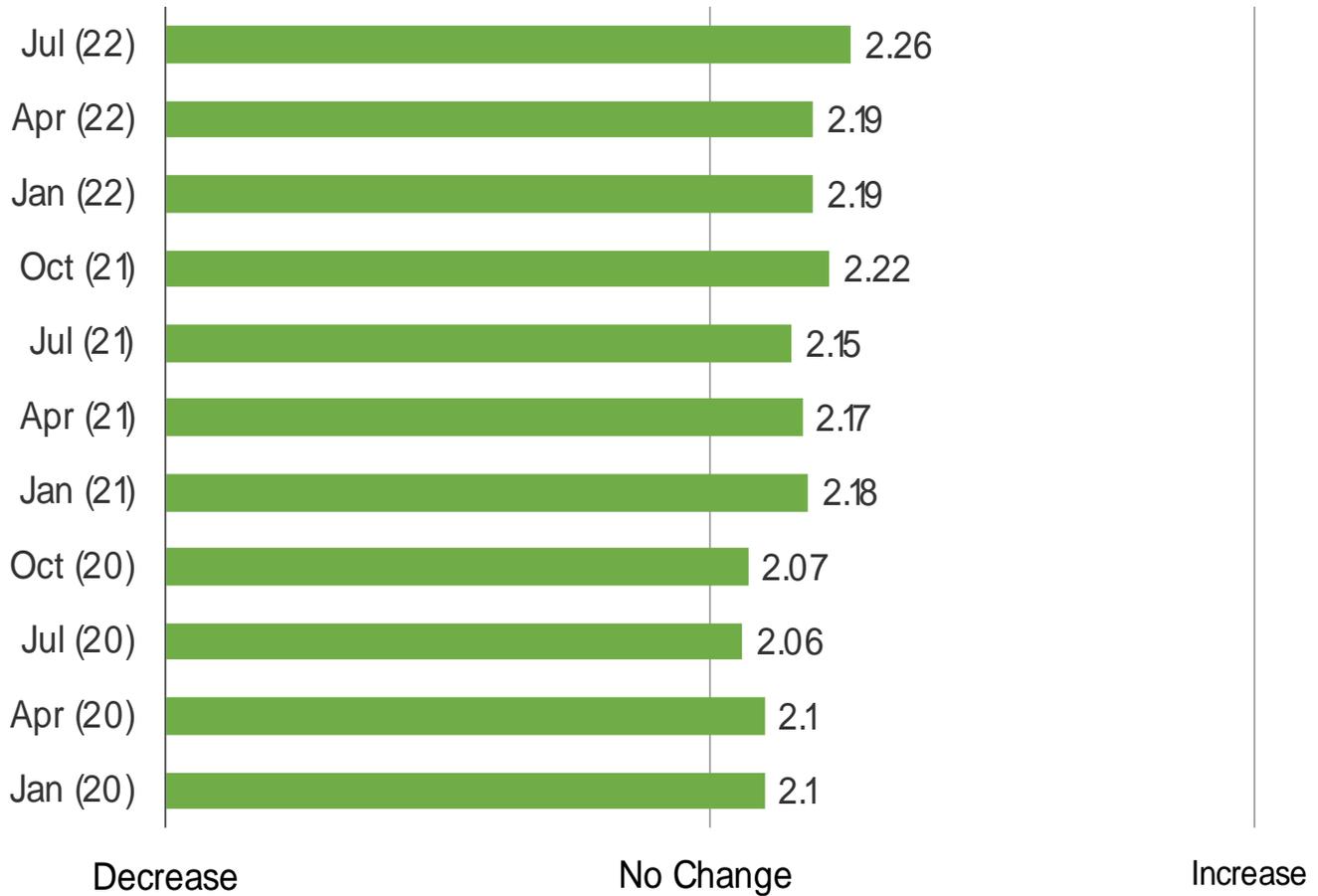
APPROXIMATELY HOW MUCH DO YOU SPEND ON CABLE/SATELLITE TV SERVICES PER MONTH?

Posed to respondents who watch video content at home.



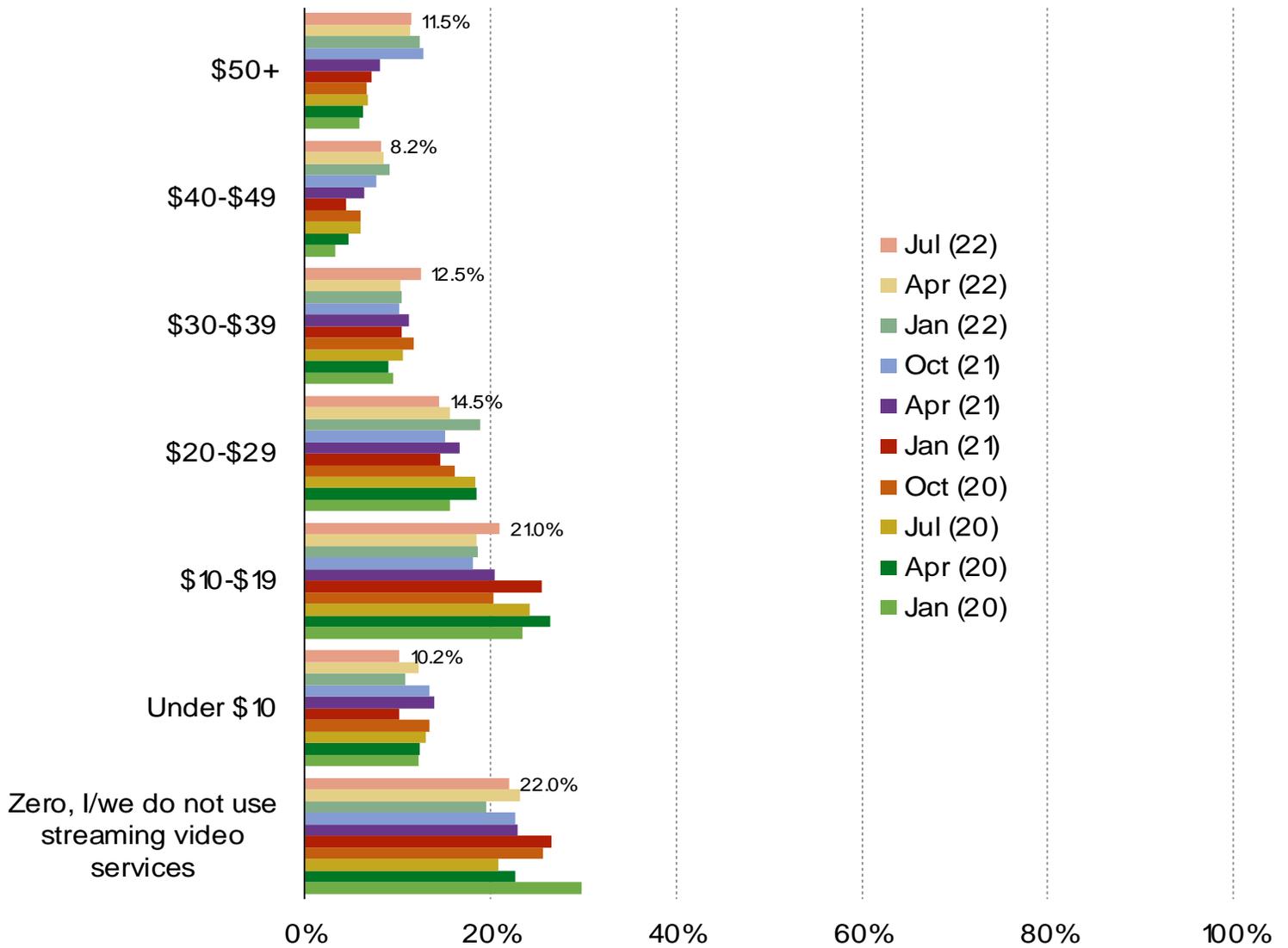
IN THE NEXT YEAR, DO YOU EXPECT THE AMOUNT YOU PAY PER MONTH FOR CABLE OR SATELLITE TV TO CHANGE IN ANY WAY?

Posed to respondents who currently pay for cable or satellite tv.



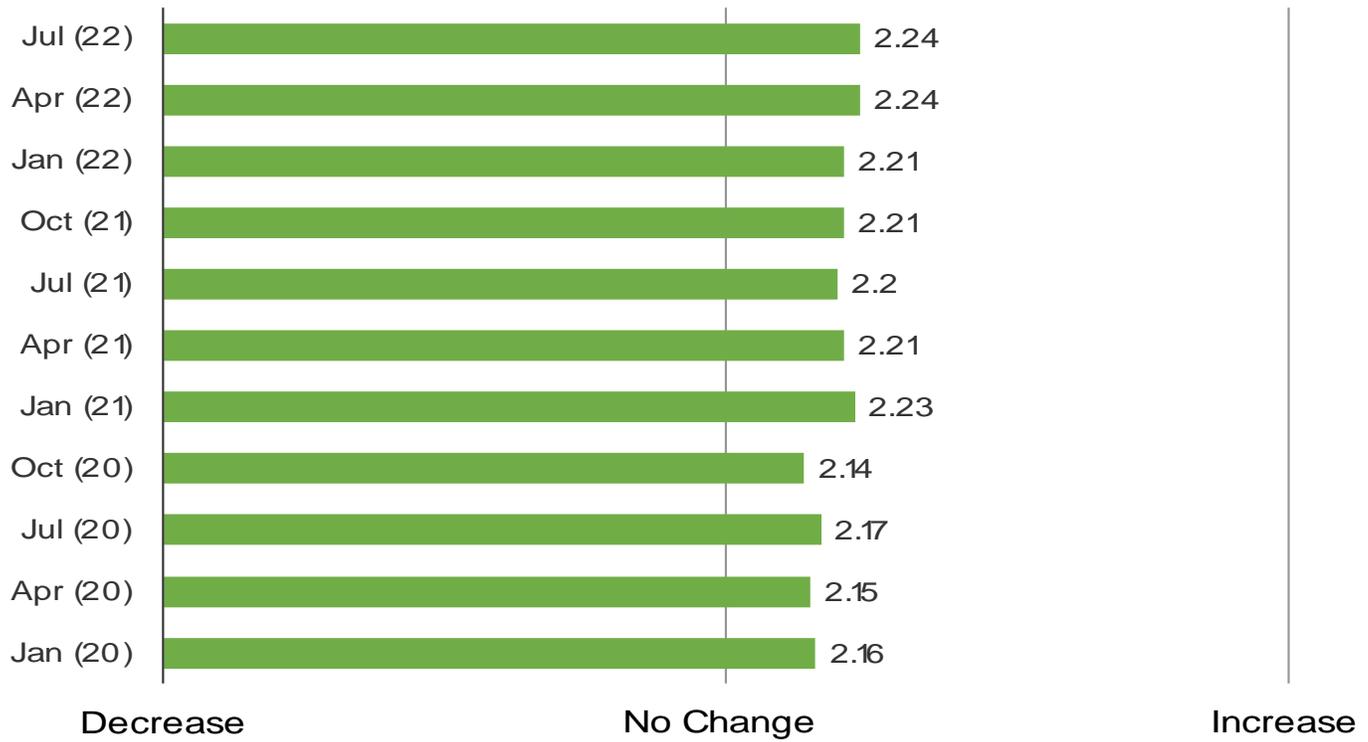
APPROXIMATELY HOW MUCH DO YOU SPEND ON STREAMING VIDEO SERVICES PER MONTH?

Posed to respondents who watch video content at home.



IN THE NEXT YEAR, DO YOU EXPECT THE AMOUNT YOU PAY PER MONTH FOR STREAMING VIDEO SERVICES TO CHANGE IN ANY WAY?

Posed to respondents who currently pay for cable or satellite tv.

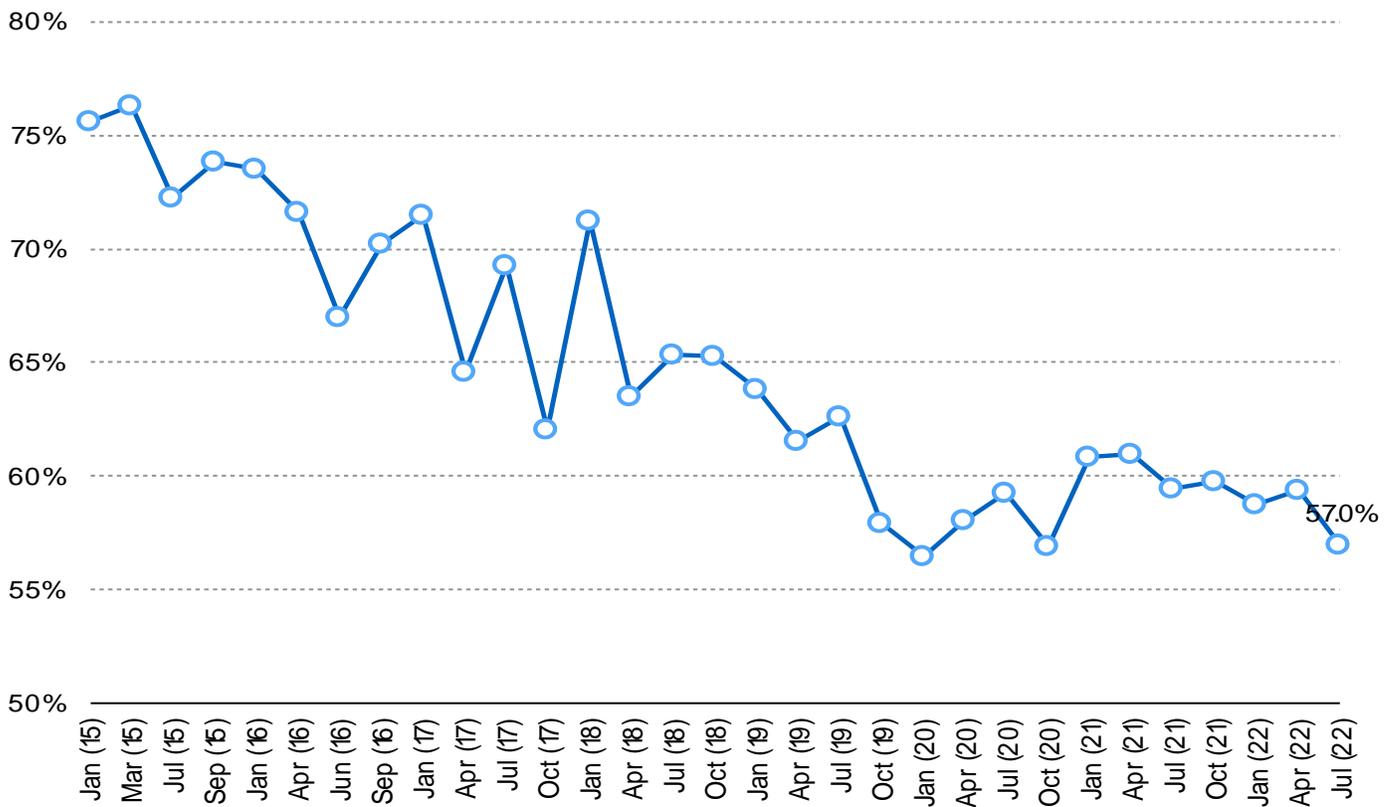


Streaming Wars

CORD CUTTING

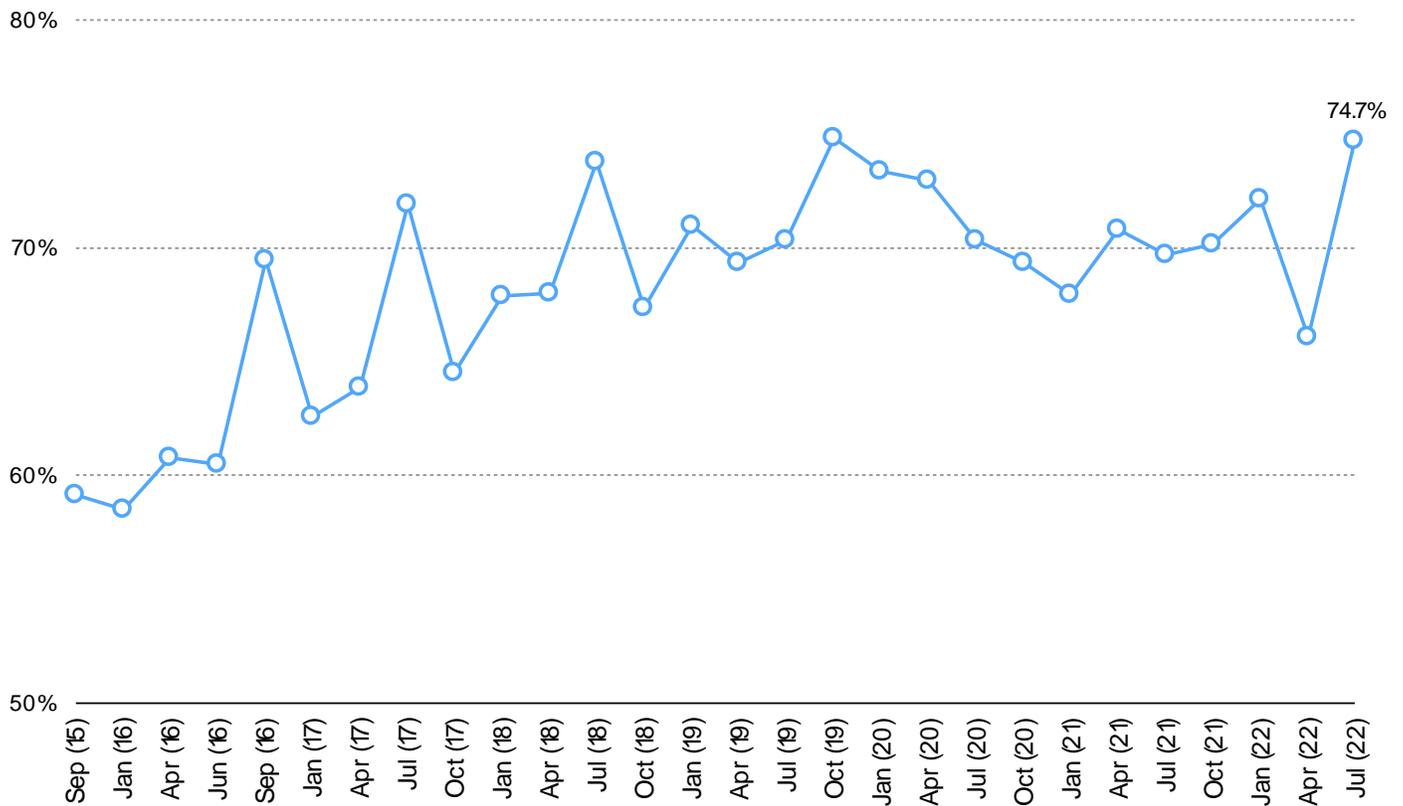
DO YOU CURRENTLY SUBSCRIBE TO CABLE, SATELLITE, OR TELCO TV?

This question was posed to respondents who watch video on demand via cable, satellite, or streaming services at home.



CORD CUTTERS: HAVE YOU TERMINATED YOUR CABLE/SATELLITE/TELCO TV SUBSCRIPTION TO USE INTERNET STREAMING SERVICES INSTEAD?

This question was posed to respondents who watch movies and/or TV shows at home.

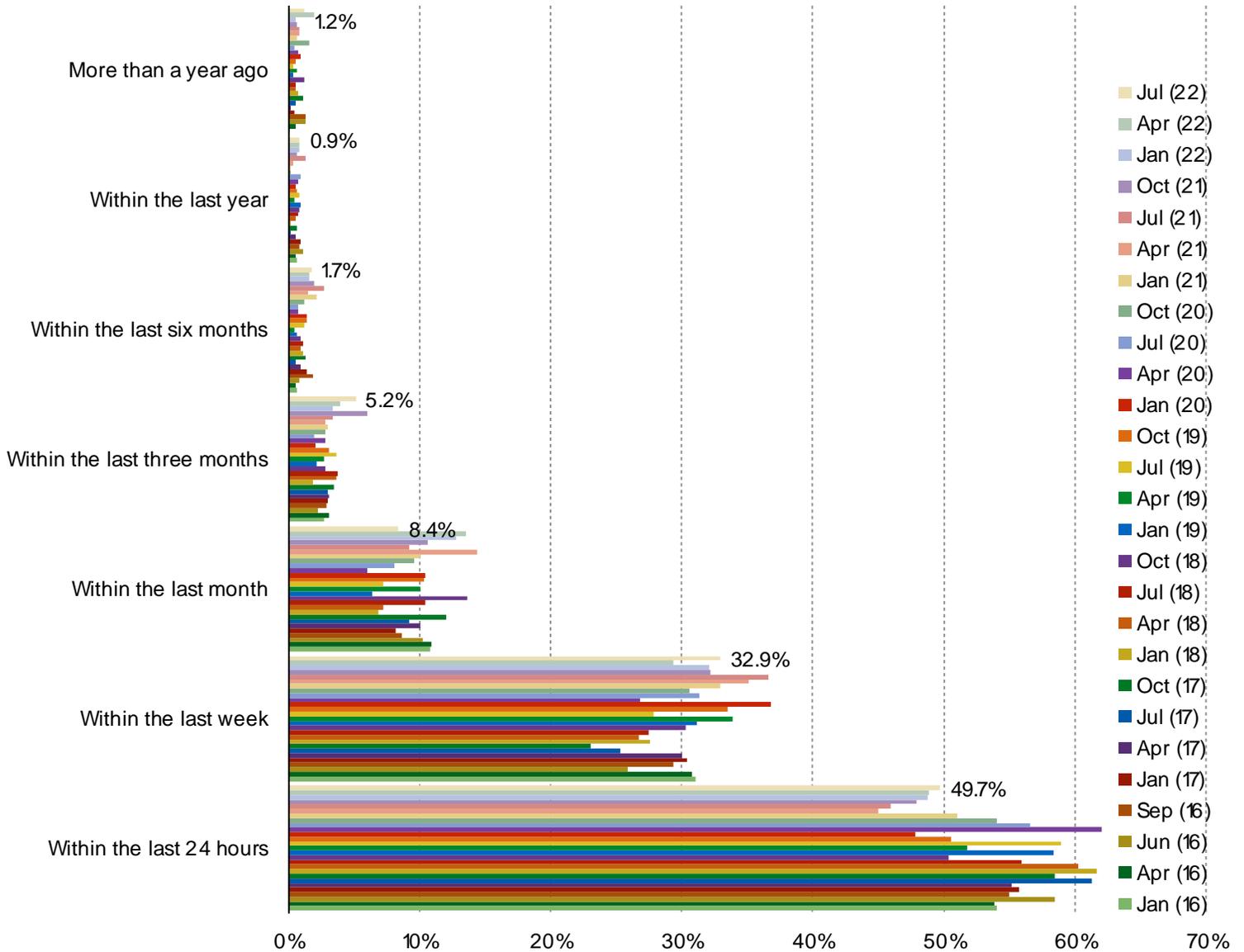


Streaming Wars

NETFLIX SUBSCRIBER ENGAGEMENT

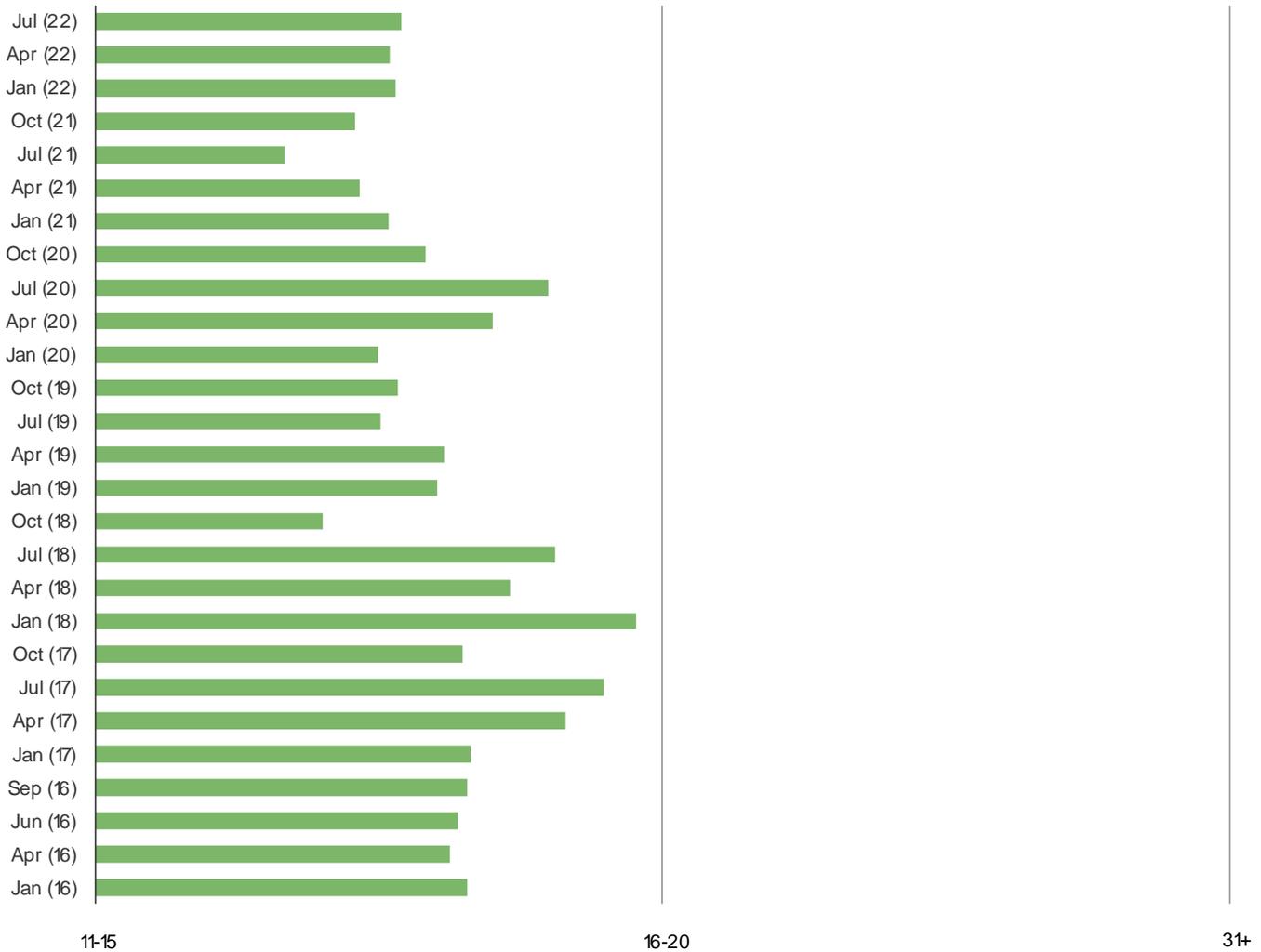
WHEN IS THE LAST TIME YOU WATCHED SOMETHING ON NETFLIX?

Posed to Netflix subscribers.



IN AN AVERAGE MONTH, HOW MANY HOURS OF NETFLIX DO YOU WATCH?

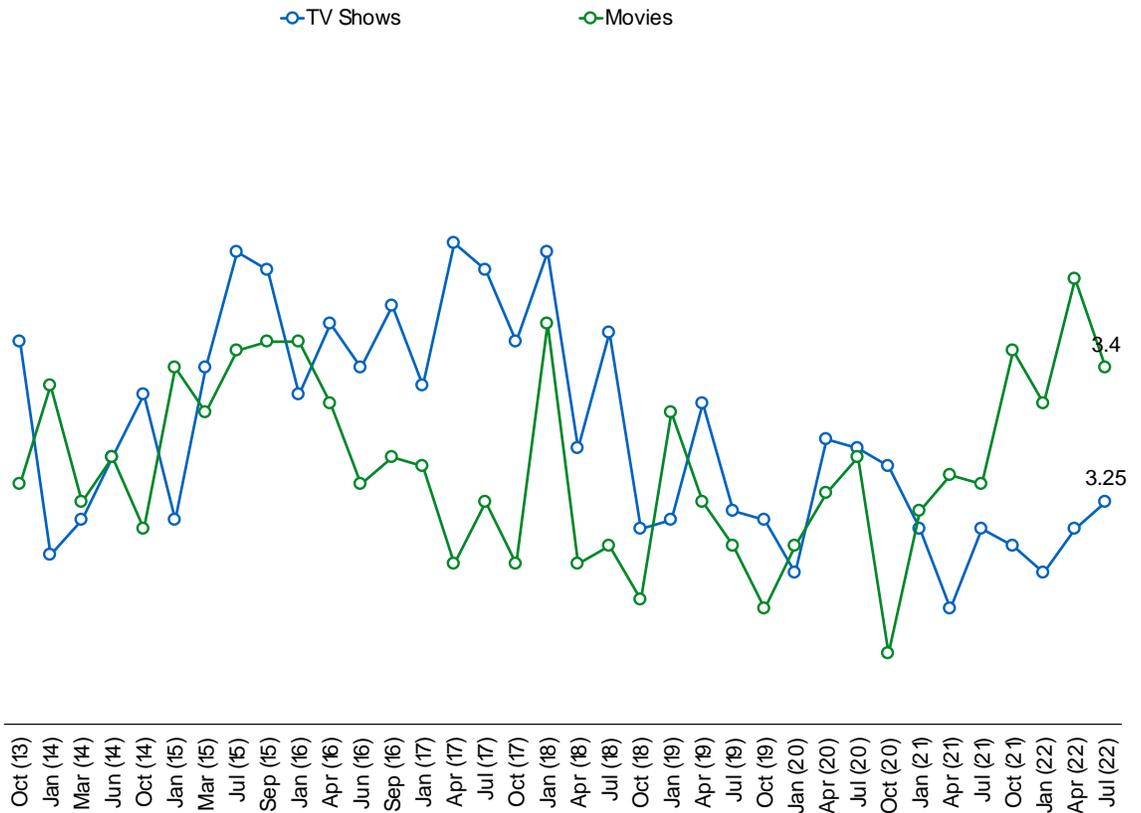
Posed to Netflix subscribers.



FREQUENCY OF WATCHING TV SHOWS AND MOVIES

Posed to Netflix subscribers.

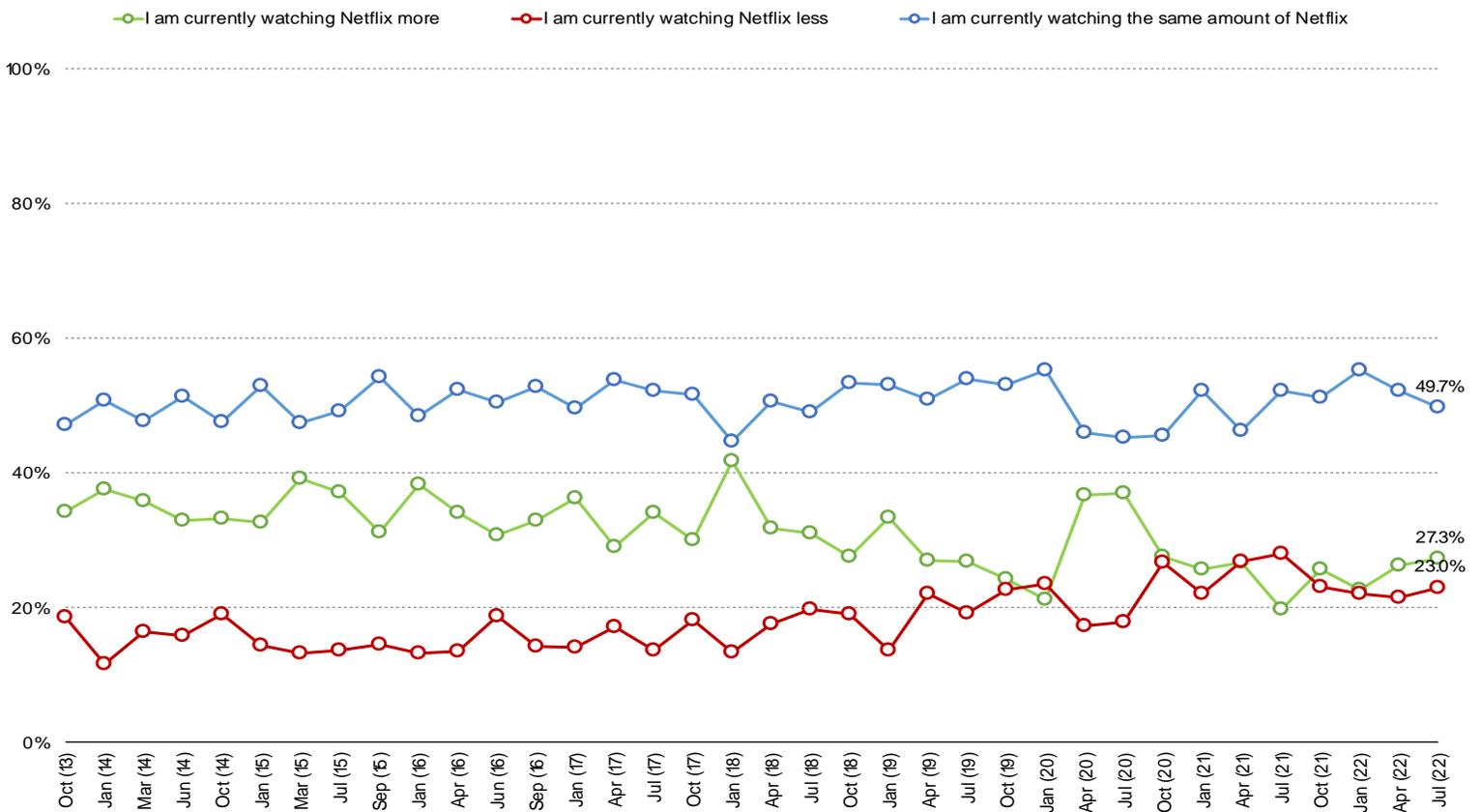
Frequently



Somewhat Frequently

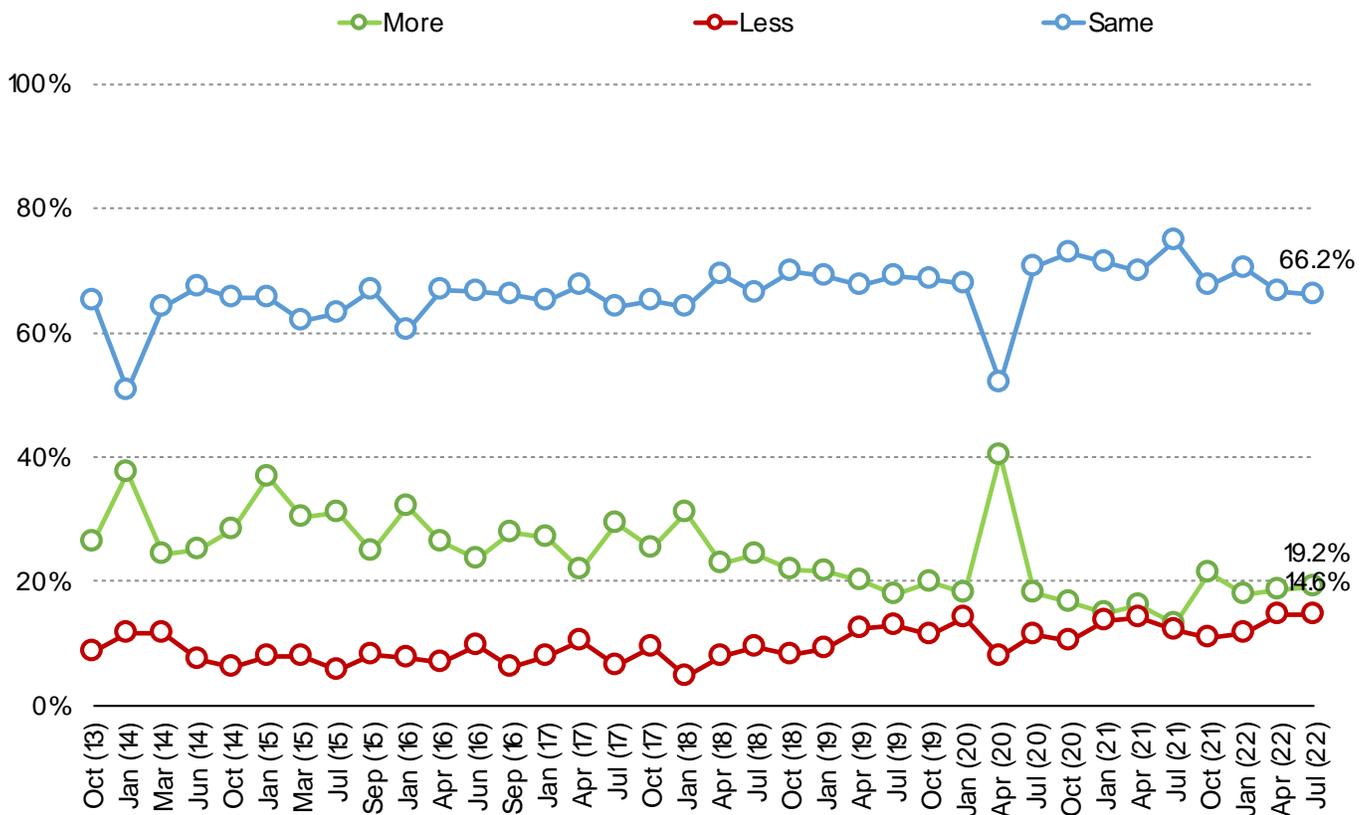
PLEASE COMPARE YOUR CURRENT USAGE OF NETFLIX WITH YOUR USAGE 3-6 MONTHS AGO.

Posed to Netflix subscribers.



DO YOU EXPECT TO USE NETFLIX MORE OR LESS OVER THE NEXT FEW MONTHS?

Posed to Netflix subscribers.

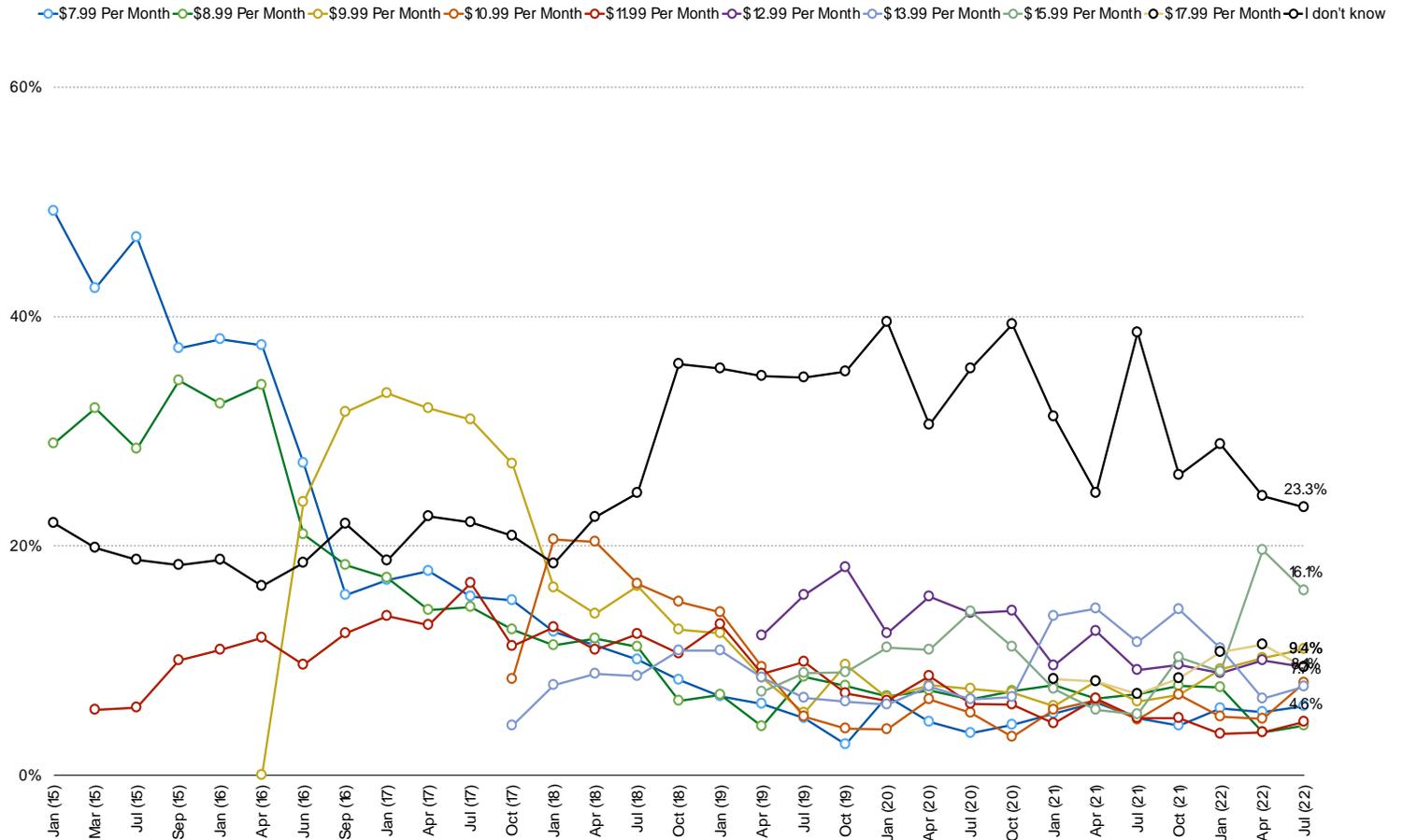


Streaming Wars

NETFLIX PRICING POWER

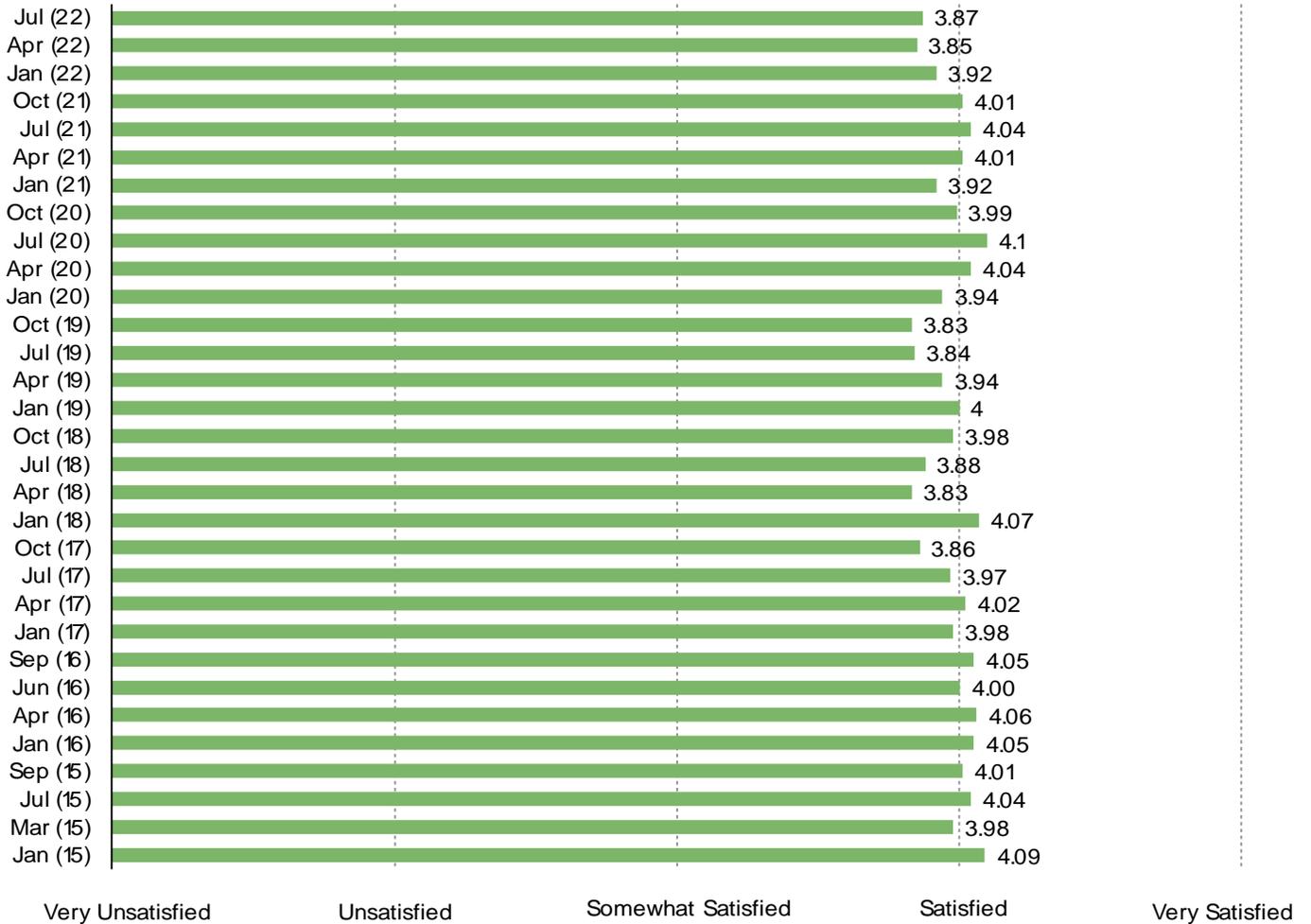
HOW MUCH DO YOU PAY FOR YOUR NETFLIX STREAMING SUBSCRIPTION?

Posed to respondents who said they are Netflix subscribers.



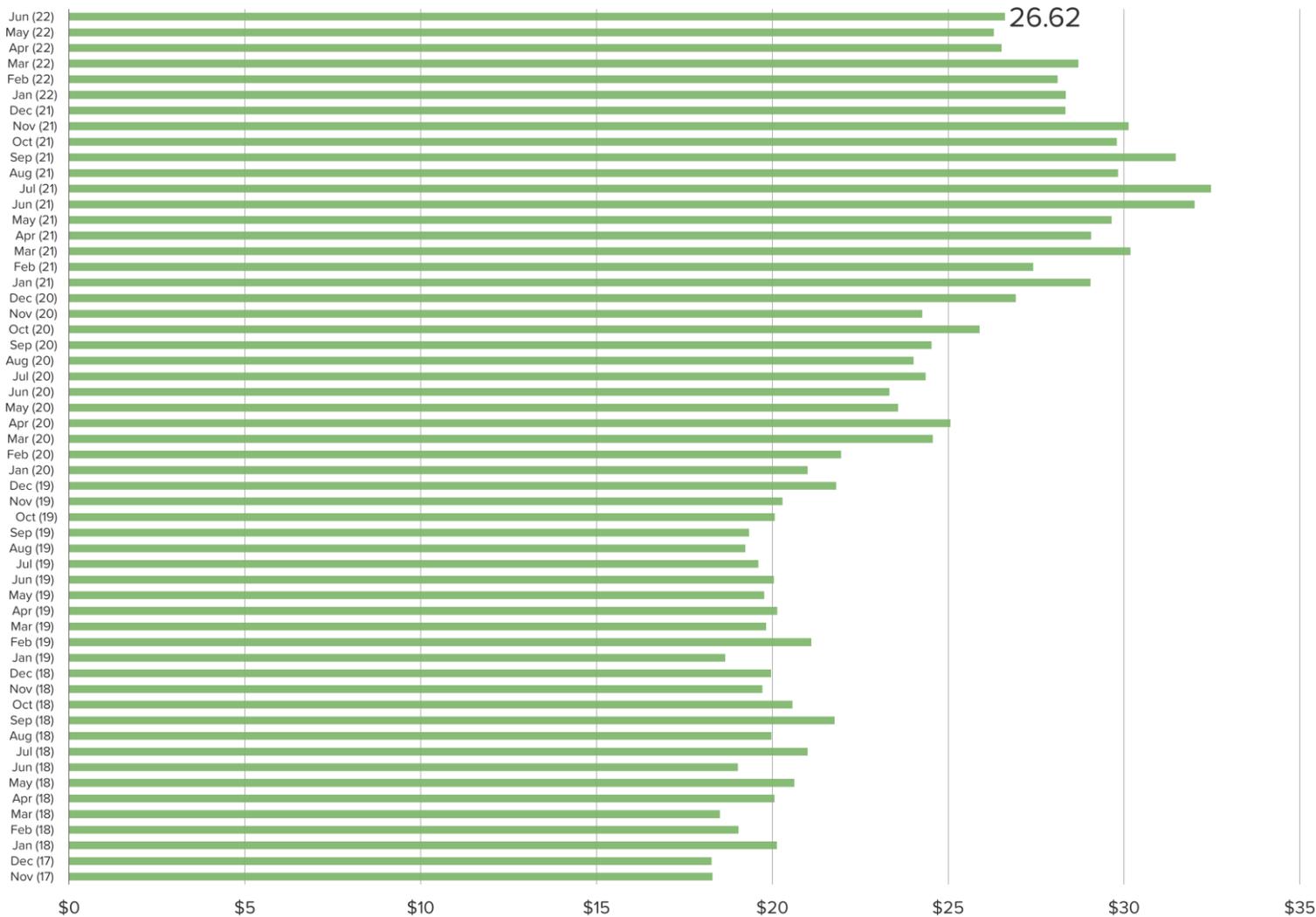
SATISFACTION WITH THE VALUE THEY RECEIVE FOR THE MONEY WITH NETFLIX

Posed to Netflix subscribers.



AT WHAT MONTHLY PRICE POINT WOULD YOU DECIDE TO CANCEL YOUR NETFLIX SUBSCRIPTION? (IF NETFLIX CONTINUES TO INCREASE, WHAT PRICE PER MONTH WOULD TRIGGER YOU CANCELLATION?)

Posed to Netflix subscribers.

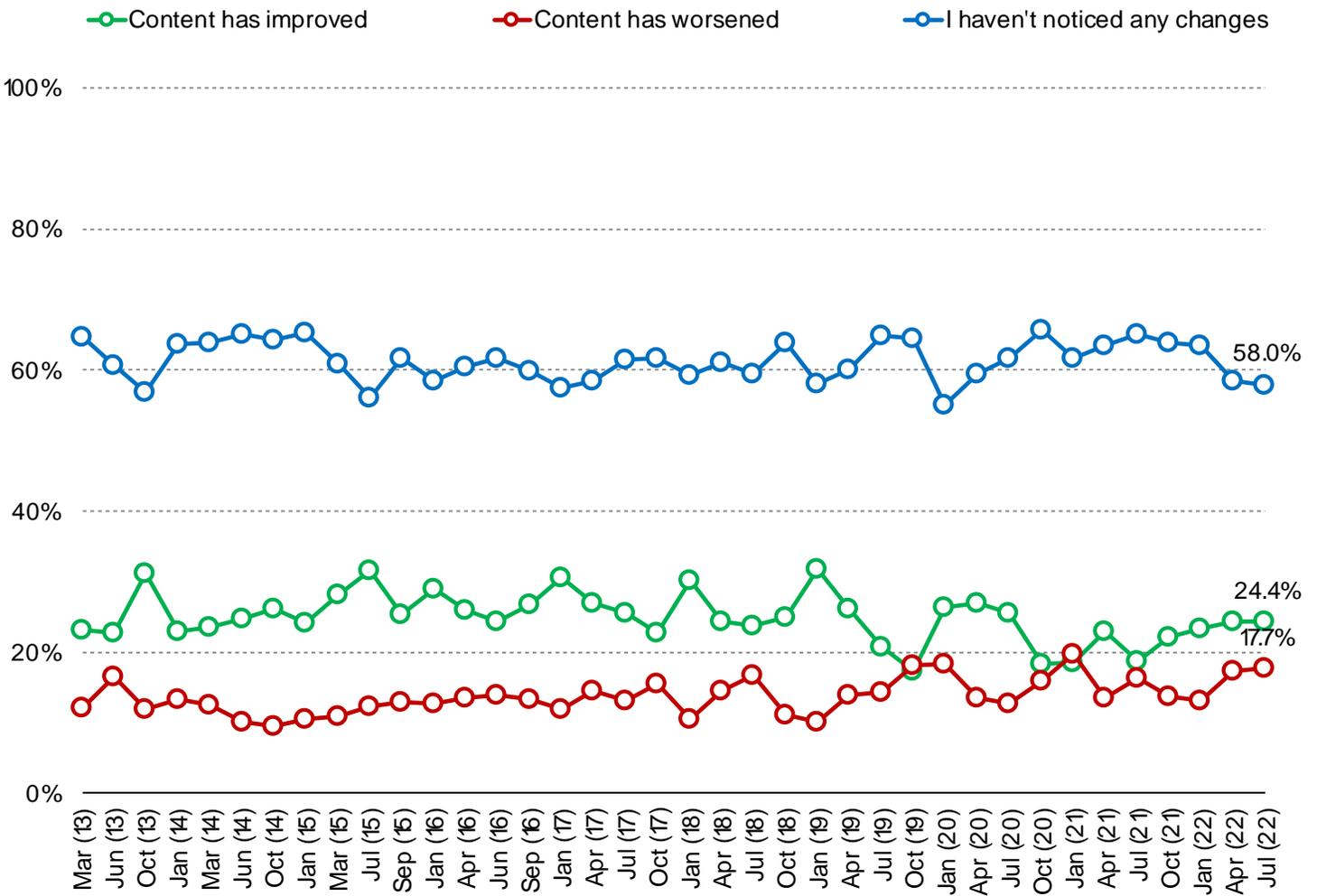


Streaming Wars

NETFLIX CONTENT

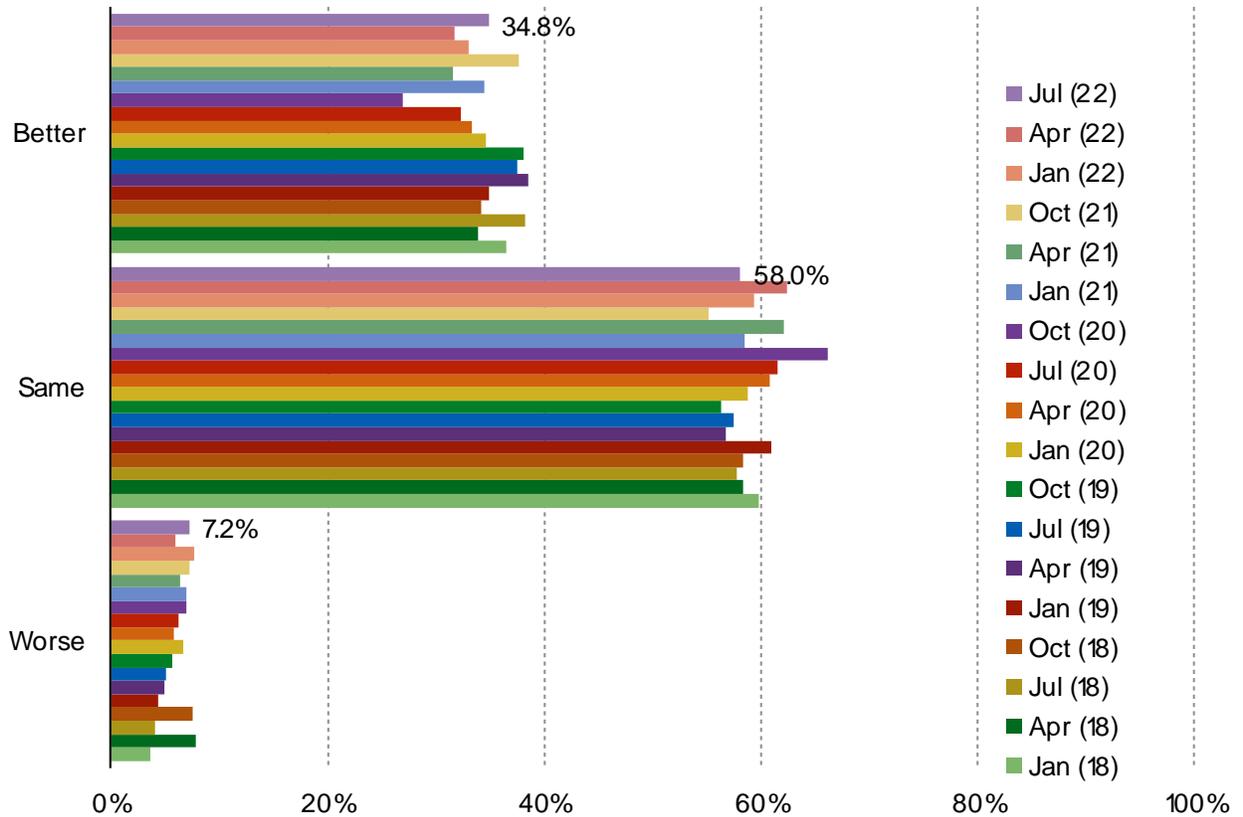
HAVE YOU NOTICED ANY CHANGES TO NETFLIX'S CONTENT OVER THE LAST SIX MONTHS?

Posed to Netflix subscribers.



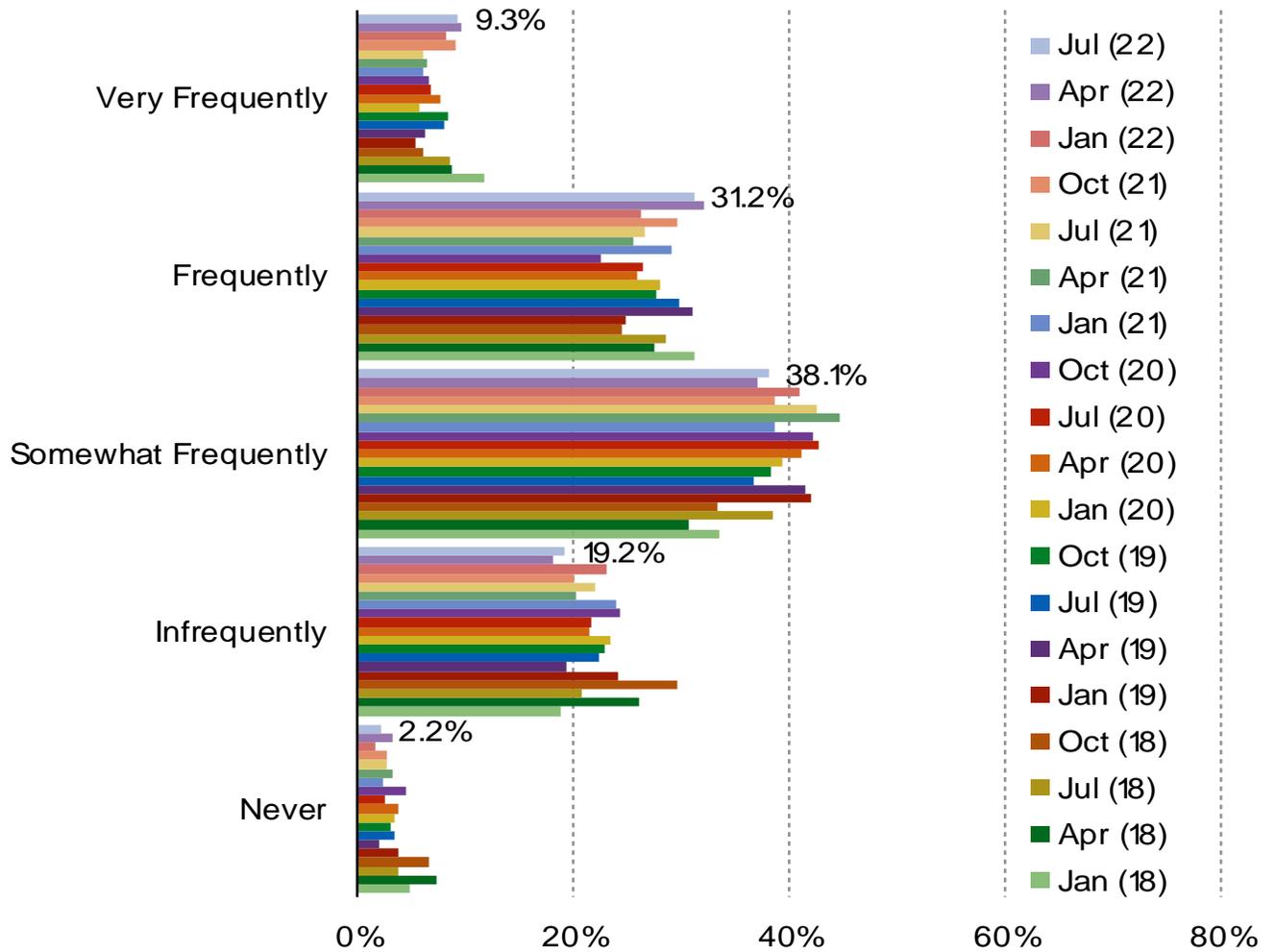
HOW DO YOU COMPARE NETFLIX ORIGINAL CONTENT SHOWS AGAINST SHOWS YOU VIEW ON OTHER NETWORKS OR SERVICES?

Posed to Netflix subscribers.



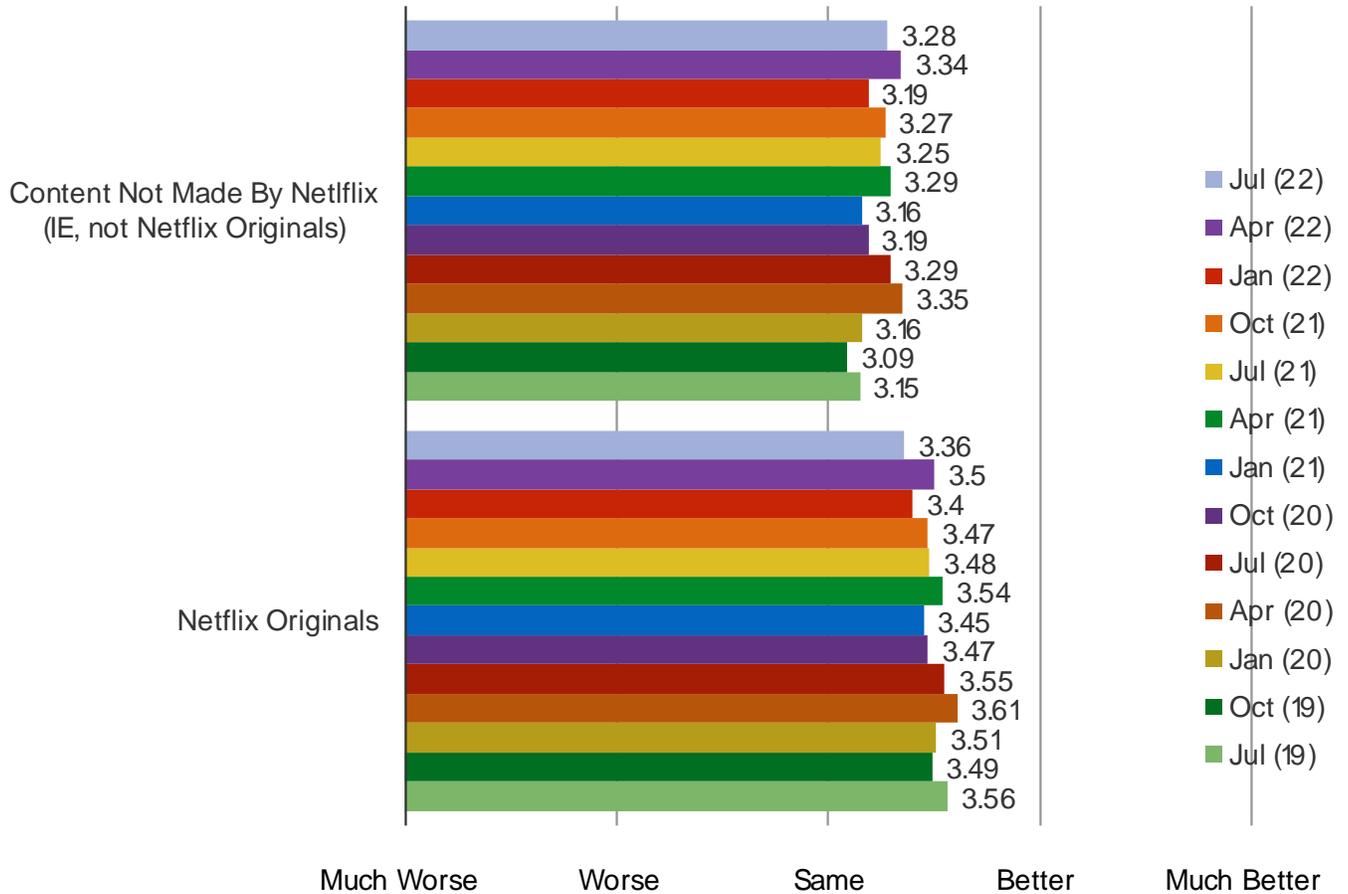
HOW OFTEN DO YOU WATCH NETFLIX ORIGINAL CONTENT SHOWS?

Posed to Netflix subscribers.



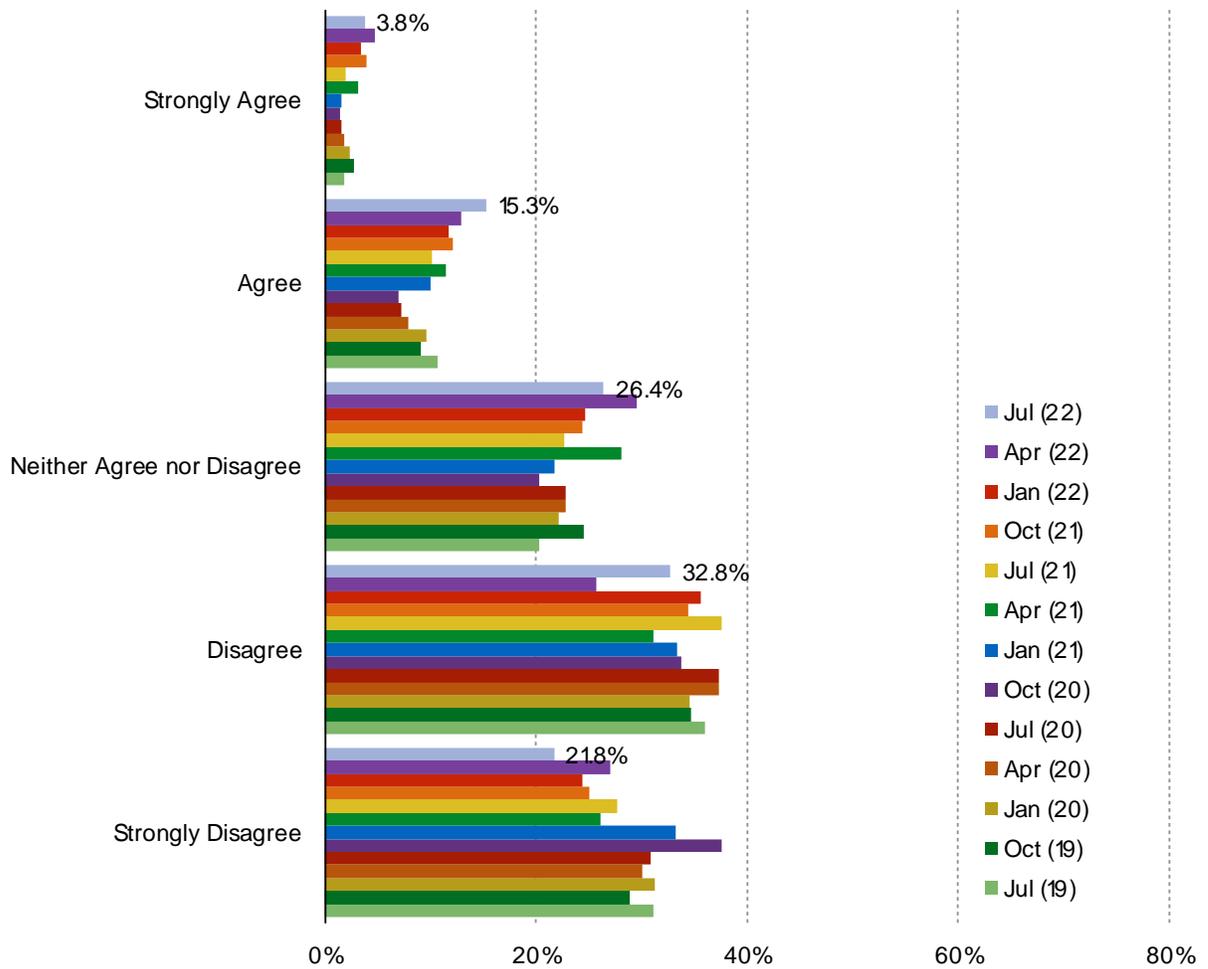
ONE YEAR FROM NOW, DO YOU EXPECT THE CONTENT AVAILABLE ON NETFLIX TO BE BETTER OR WORSE THAN IT IS TODAY?

Posed to Netflix subscribers.



“THE PRICE FOR NETFLIX WOULD STILL BE WORTH IT EVEN IF IT ONLY GOT ME ACCESS TO NETFLIX ORIGINALS.”

Posed to Netflix subscribers.

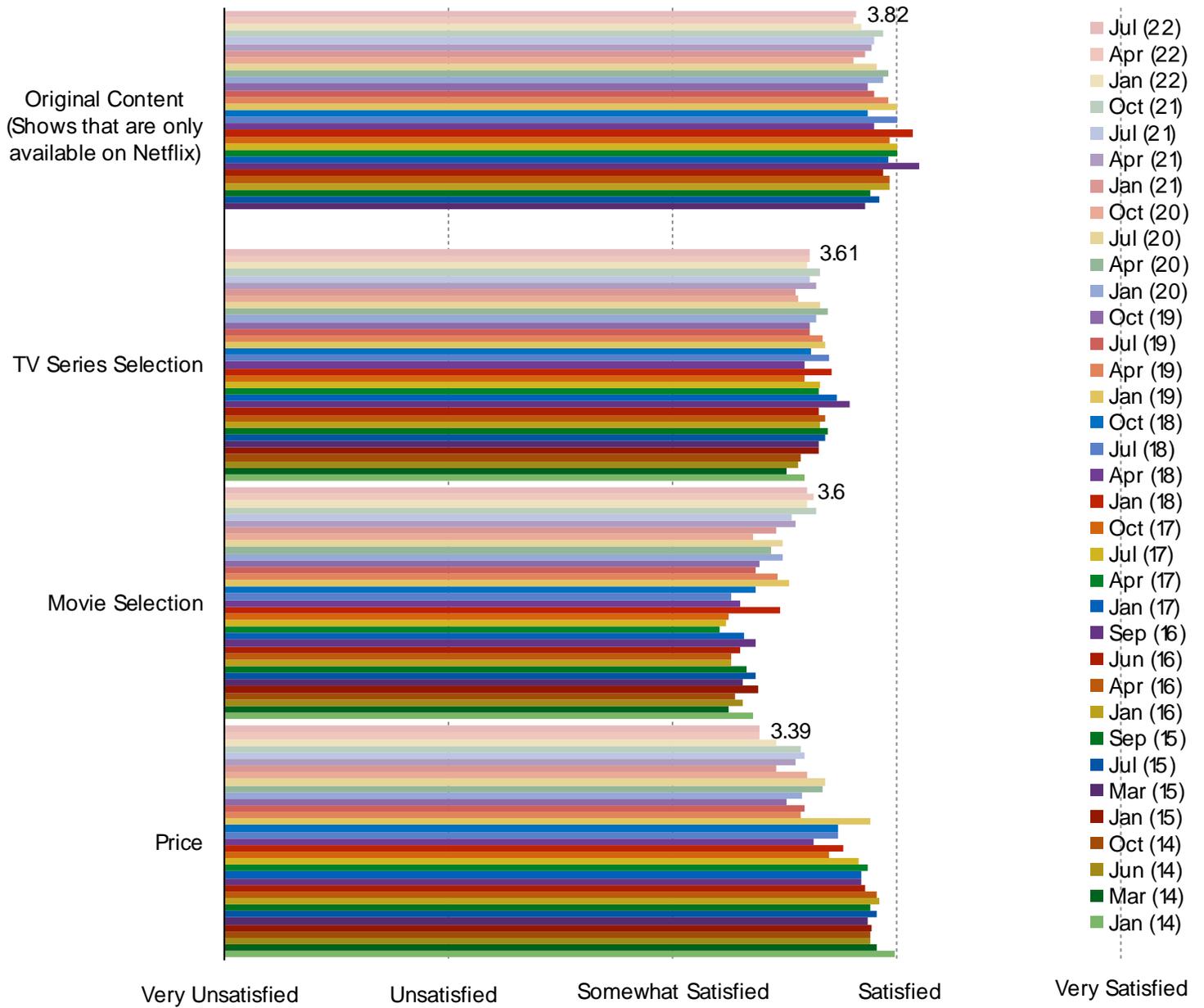


Streaming Wars

NFLX SENTIMENT

SATISFACTION WITH NETFLIX

Posed to Netflix subscribers.

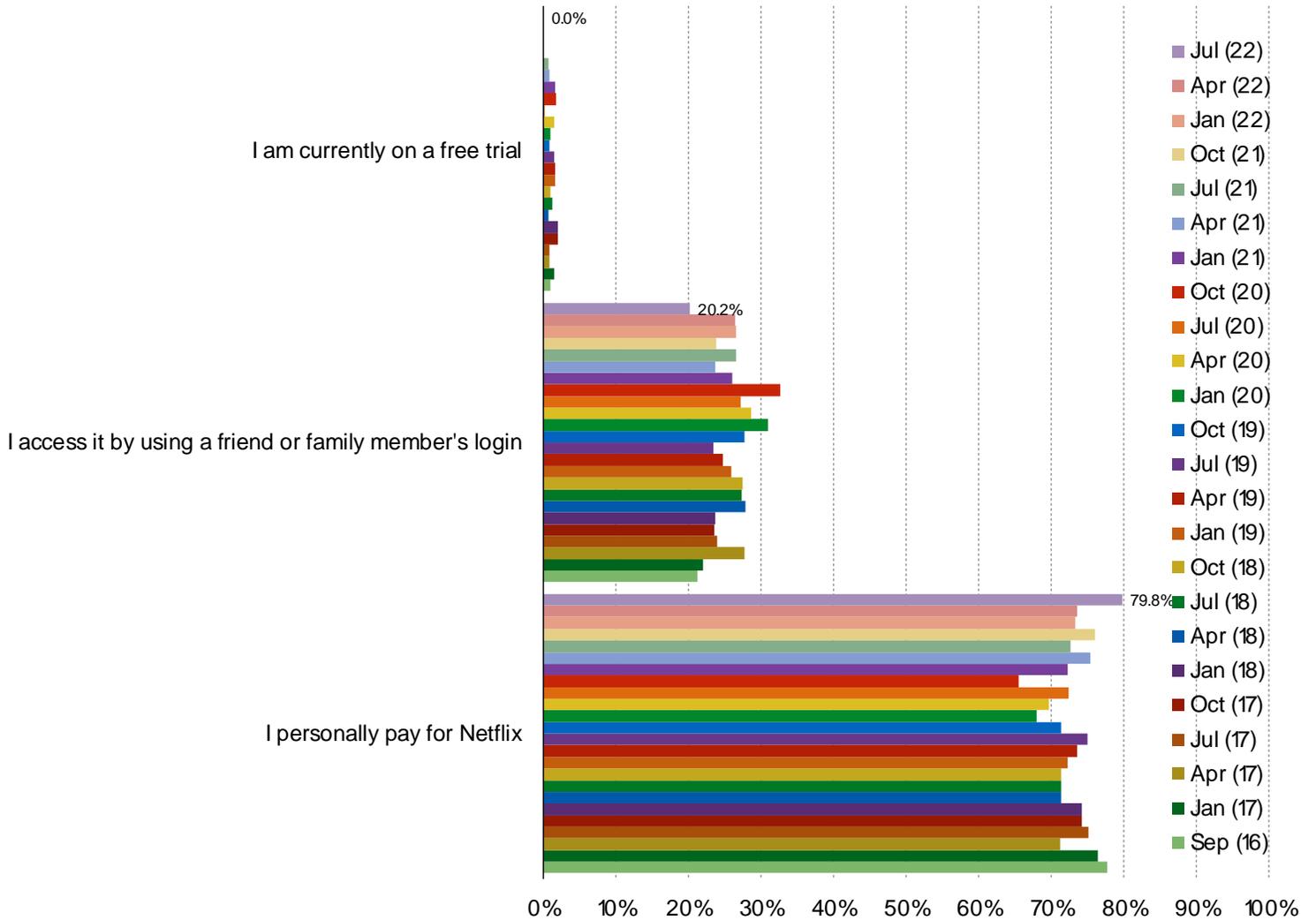


Streaming Wars

NFLX ACCOUNT SHARING

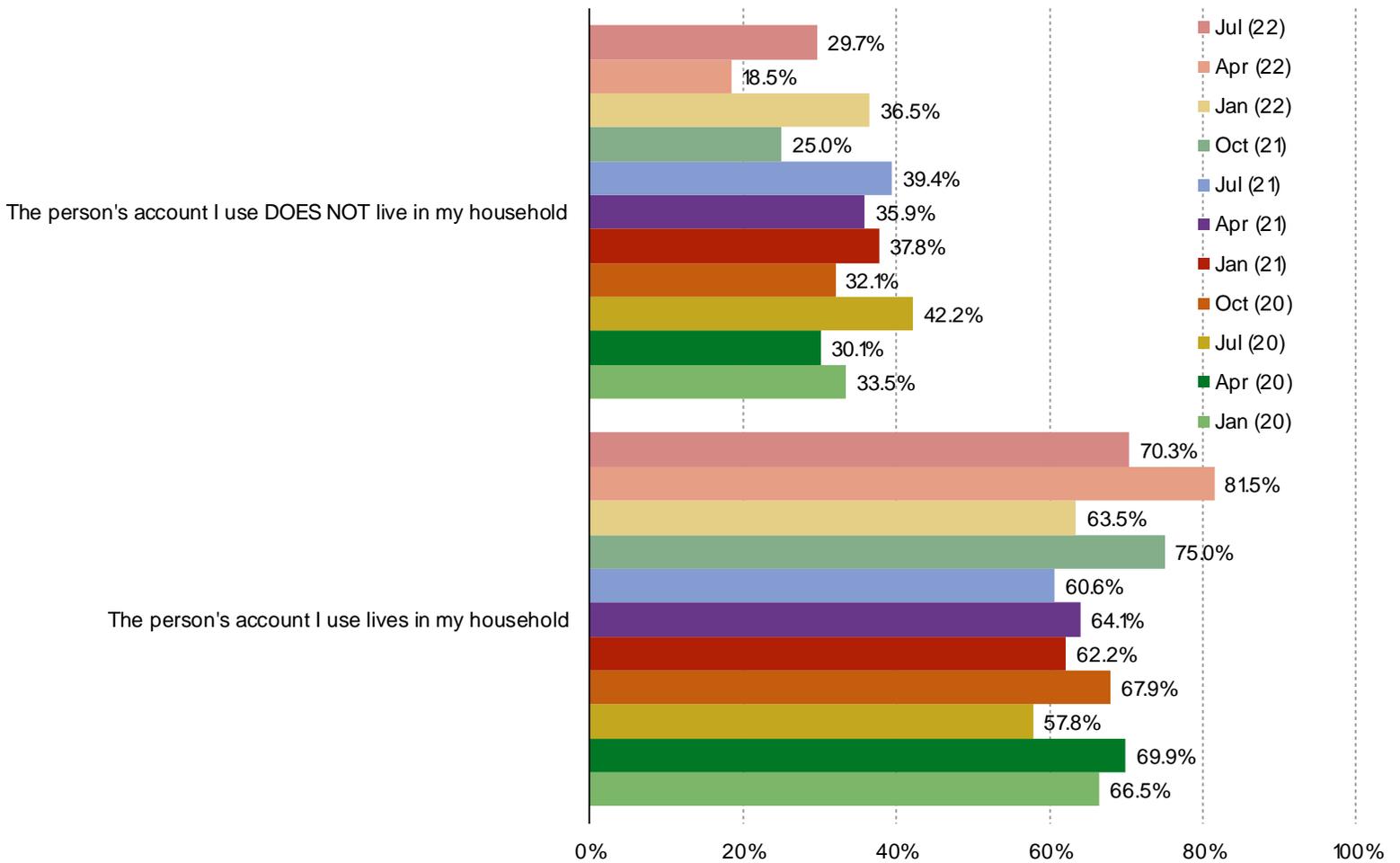
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

Posed to Netflix subscribers.



DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

Posed to Netflix subscribers who access it by using a family or friend’s login (31% of subscribers).

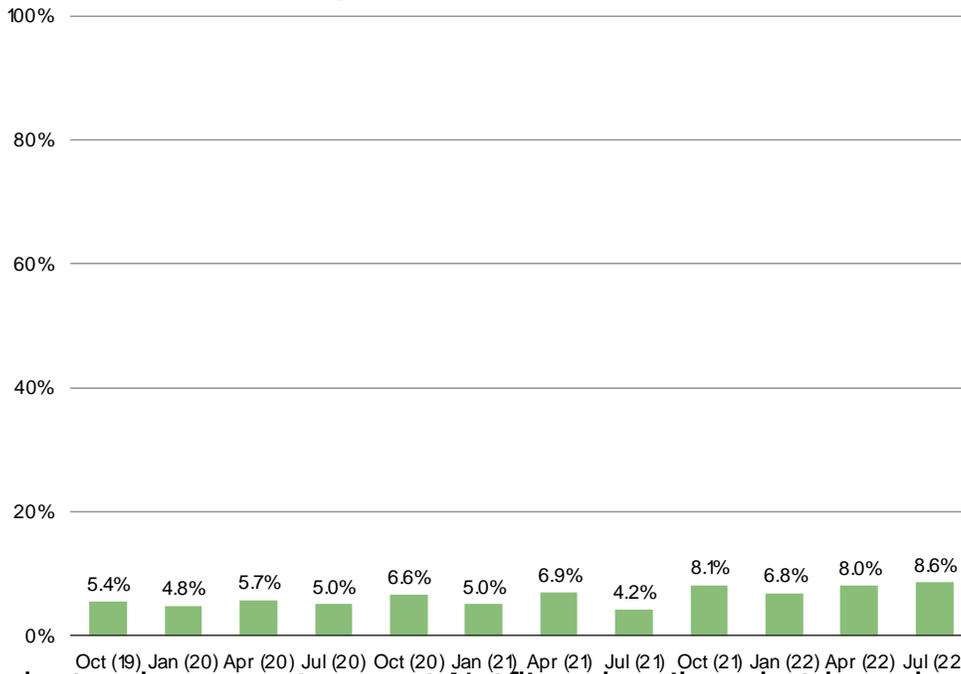


Streaming Wars

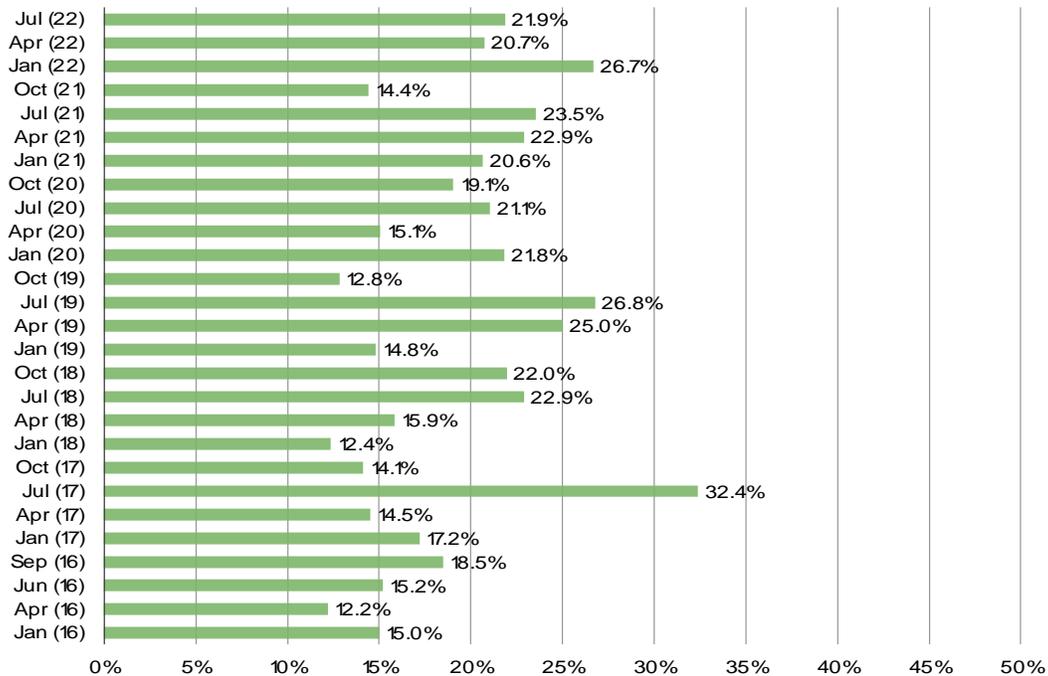
CYCLING IN AND OUT OF NETFLIX

DO YOU SIGN UP FOR NETFLIX FOR A PERIOD OF TIME AND THEN CANCEL, OR DO YOU CONSISTENTLY REMAIN A SUBSCRIBER?

Posed to respondents who said they are Netflix subscribers.



Posed to respondents who are not current Netflix subscribers but have been in the past.

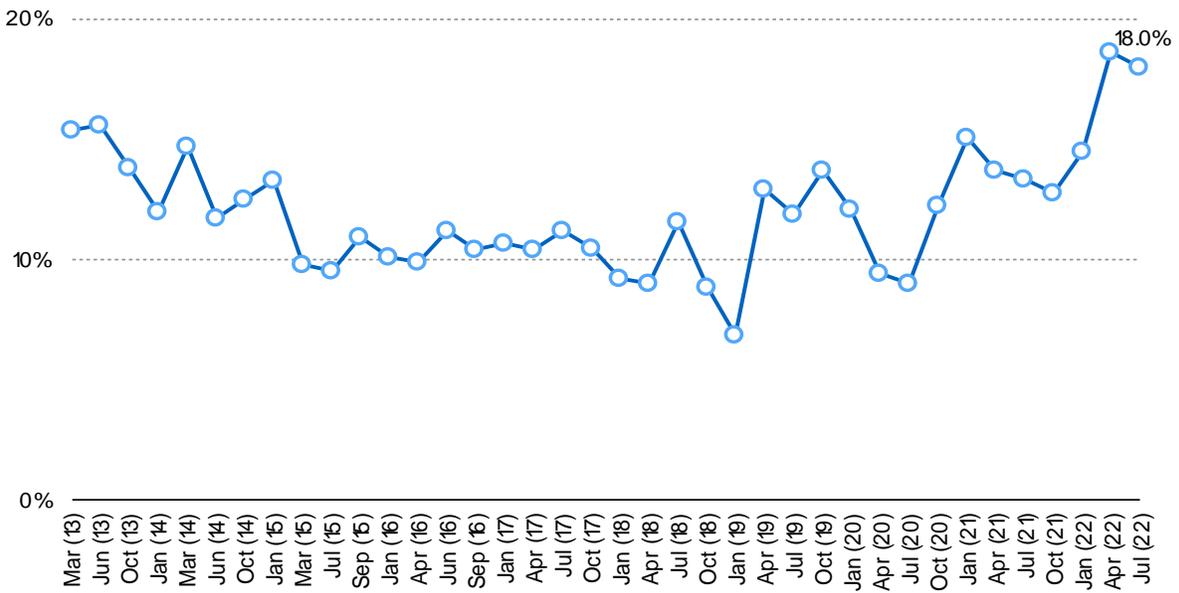


Streaming Wars

NFLX CHURN

ARE YOU CONSIDERING CANCELLING YOUR NETFLIX SUBSCRIPTION?

Posed to Netflix subscribers.



WHY ARE YOU CONSIDERING CANCELLING?

Posed to Netflix subscribers who said they are considering cancelling.

*The app is charging so much more when everyone is struggling with even affording living needs
Just not worth the money to me*

Price

Overpriced and not worth the value in this economy

Lowering my expenses

Too expensive, and despite paying for the family plan, I don't really have time for it - it's more for family members

Too expensive

Prices went up and the content isn't as good as it used to be

Too expensive, and the same content is elsewhere

Netflix can no longer hold my interest and I HATE the automatic previews more than I hate xfinity

Too much foreign content to sift through. I don't like dubs or subtitles but sometimes I don't even know until I start watching.

Have too many services will start rotation

The shows I like are ending

Nothing of interest to watch

Not enough to watch

Keep canceling shows, only do 8 episodes a season then takes two years for a new season. It's ridiculous how nothing stays or leaves after 3 seasons. Why get involved with anything new at this point

Viewing options are limited for my taste

Price keeps going up

Content not worth the price; price has increased

Don't watch enough to justify the cost

I intended to subscribe only 2 months

It seems I am struggling more and more with finding content I am interested in. And so I have considered canceling and renewing only when I know of content I really want to watch. Also as a way to save money in this tight economy I have considered canceling many monthly subscription services

Too expensive

prices keep going up and content keeps getting worse

Amazon Prime gives me more value, better choices and better connectivity!

Nothing i want to watch

Cost

Getting price prohibitive through comcast

Price

Its not worth the price for the level and diversity of content

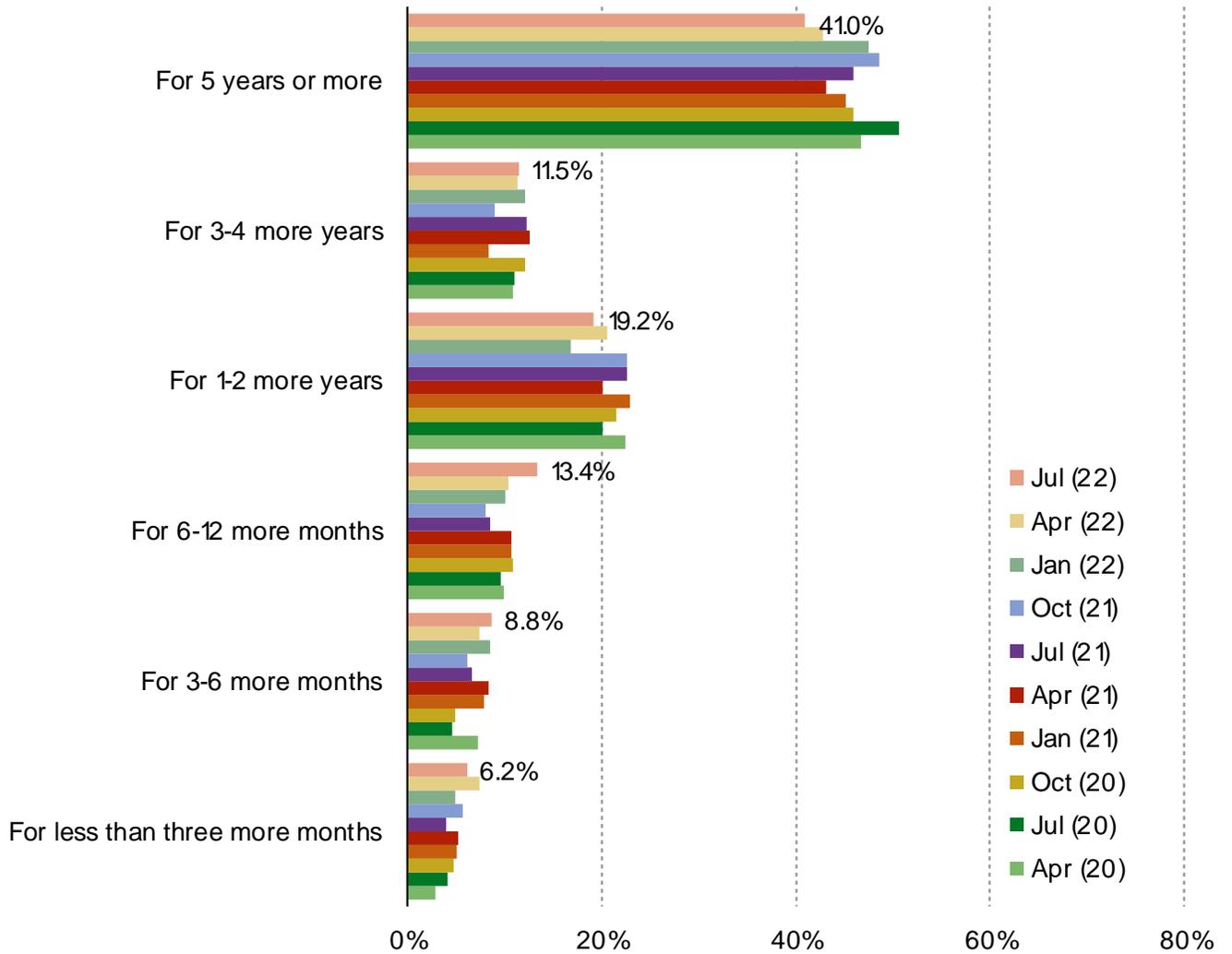
Can't find much to watch

Don't watch it enough

Quality of offerings

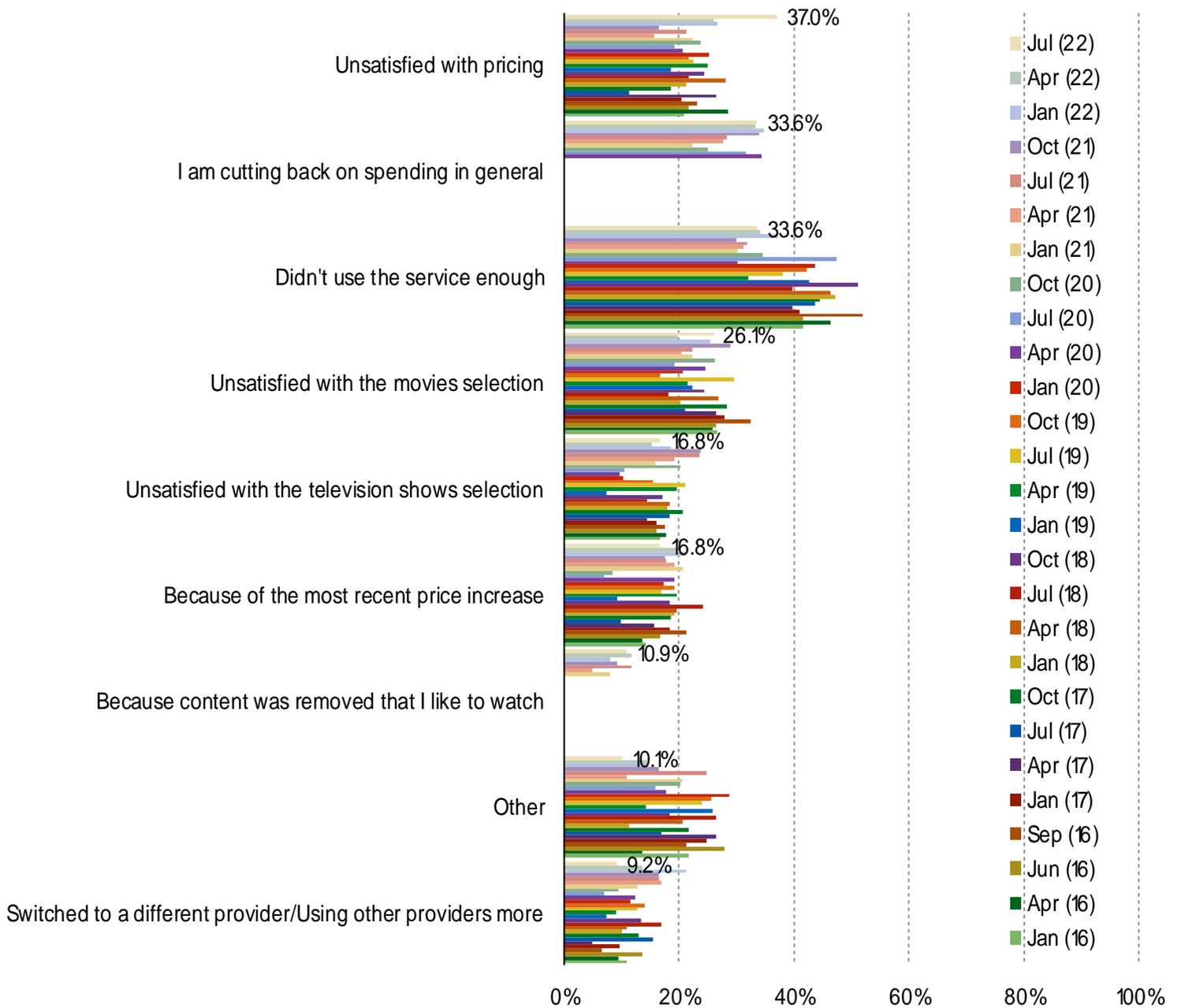
FOR HOW MUCH LONGER DO YOU EXPECT TO BE A NETFLIX SUBSCRIBER?

Posed to Netflix subscribers



FORMER NETFLIX SUBSCRIBERS – WHY DID YOU CANCEL?

Posed to former Netflix subscribers.

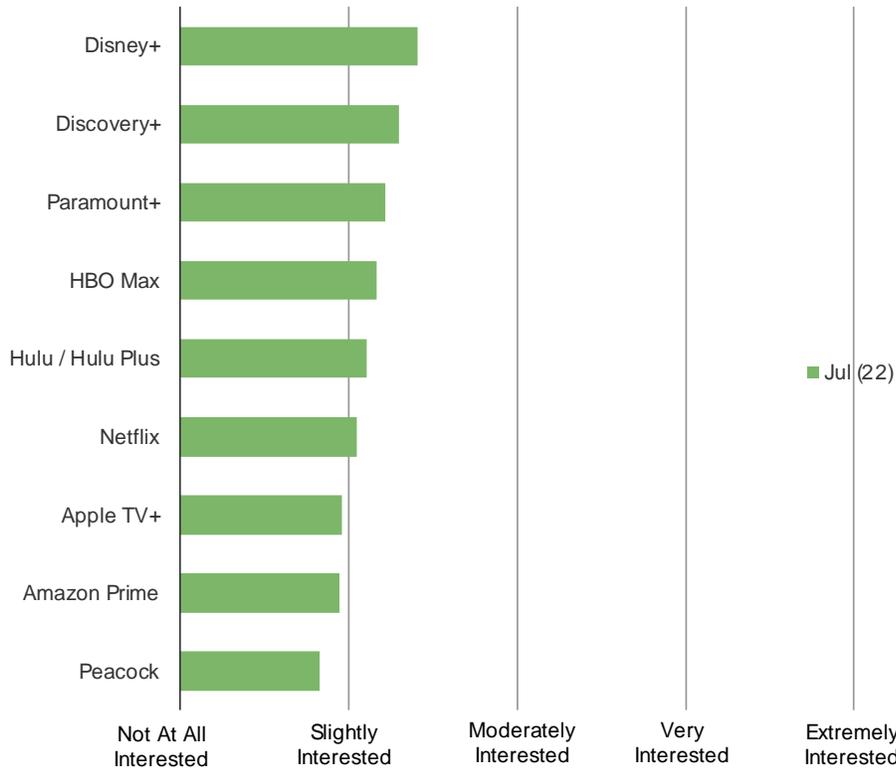


Streaming Wars

MOBILE GAMES AND NETFLIX

HOW MUCH INTEREST WOULD YOU HAVE IN PLAYING MOBILE GAMES BASED ON SHOWS/CHARACTERS FROM THE FOLLOWING PLATFORMS?

Posed to respondents who use each of the following platforms.



	N =
Netflix	603
Amazon Prime	477
Hulu / Hulu Plus	393
Disney+	325
HBO Max	258
Peacock	232
Paramount+	182
Apple TV+	103
Discovery+	83

■ No at all interested ■ Slightly interested ■ Moderately interested ■ Very interested ■ Extremely interested

