



Audience: 1,000+ Consumers In India

Note: Audience skews more urban/toward those connected to the internet.

KEY TAKEAWAYS:

STREAMING VIDEO IS THE TOP METHOD THAT RESPONDENTS USE FOR WATCHING BOTH TV SHOWS AND MOVIES.

SENTIMENT TOWARD FINANCES AND DISCRETIONARY SPENDING ABILITY IS GENERALLY STRONG.

NETFLIX DOMINATES UNAIDED AWARENESS FOR STREAMING VIDEO, RANKS SECOND BEHIND HOTSTAR IN ACCOUNT HOLDERS IN OUR SURVEY.

NETFLIX SUBSCRIBERS IN INDIA ARE ENGAGED WITH THE SERVICE AND OFFER A STRONG DEGREE OF SATISFACTION.

THERE IS RELATIVELY STRONG INTEREST IN NFLX AMONG NON-SUBSCRIBERS. 40% WOULD BE INTERESTED IN PAYING FOR IT (RS 268 ON

THE MOBILE ONLY PLAN AT RS199 APPEARS TO BE WELL-RECEIVED AMONG CONSUMERS. IT IS THE MOST POPULAR WOULD-BE CHOICE OF NON-SUBS.

(AVERAGE)

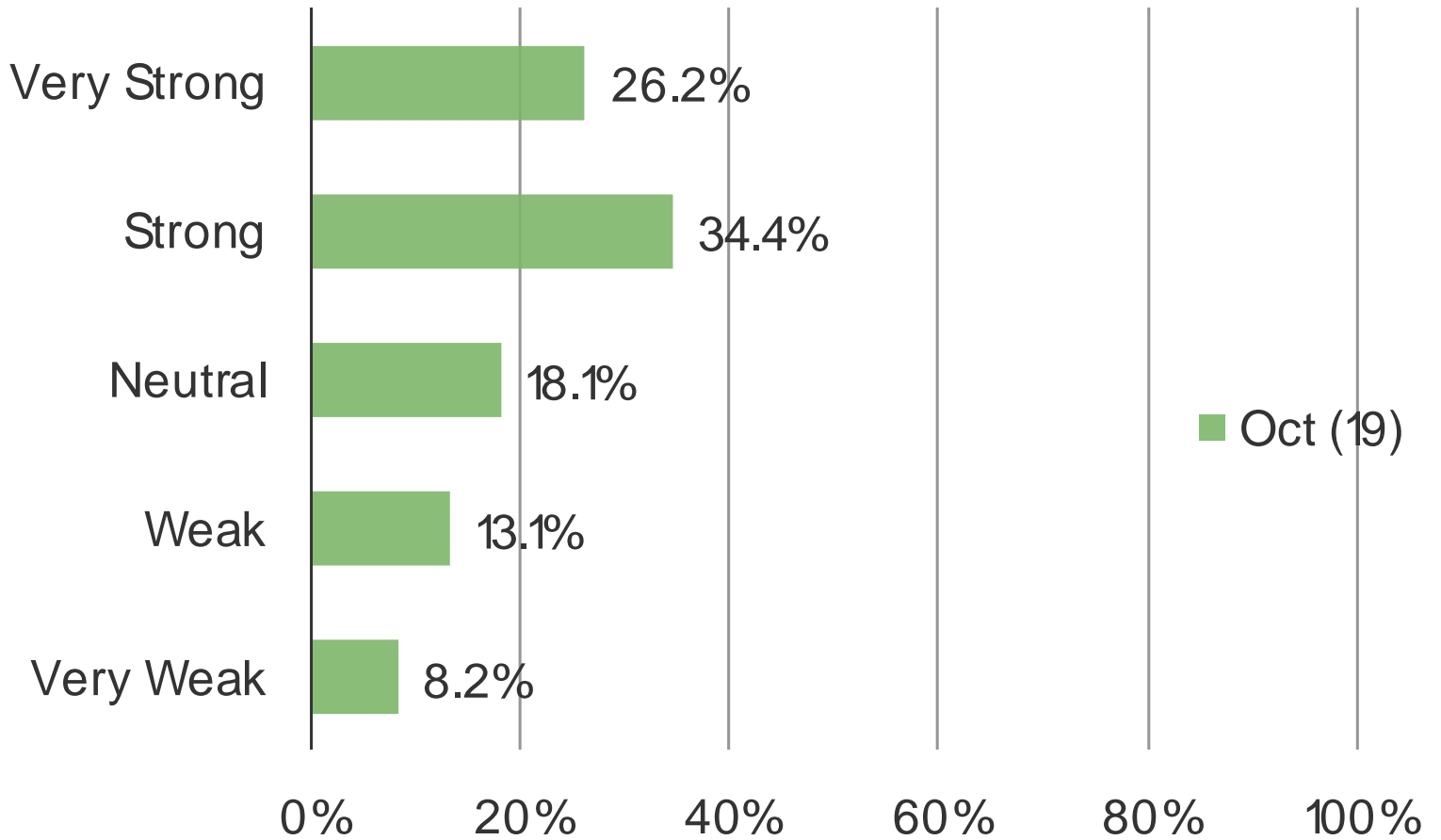
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MACRO FACTORS

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OVERALL HOW CONFIDENT DO YOU FEEL IN THE ECONOMY?

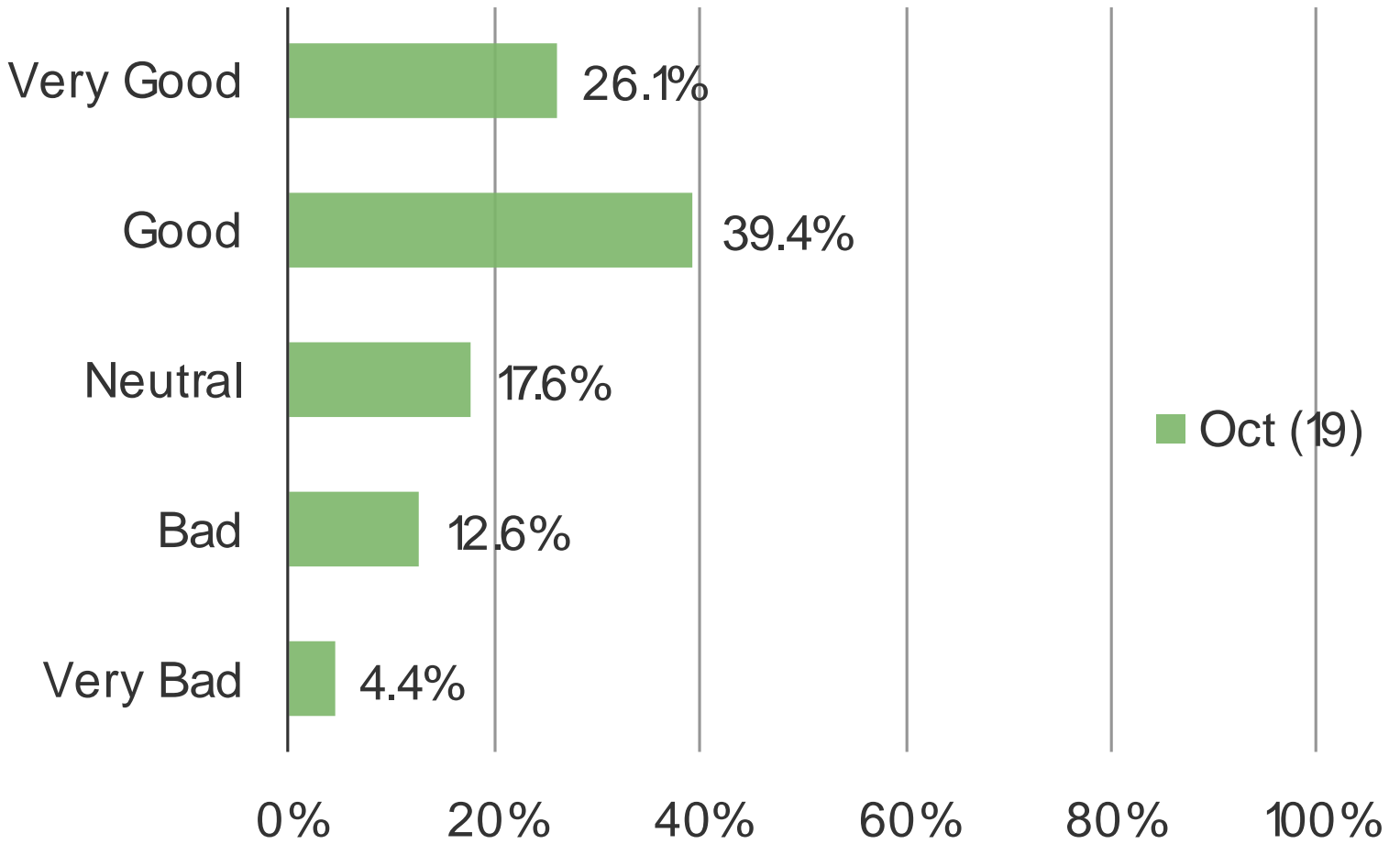
Posed to all respondents



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HOW DO YOU FEEL ABOUT YOUR PERSONAL FINANCES AT THIS TIME?

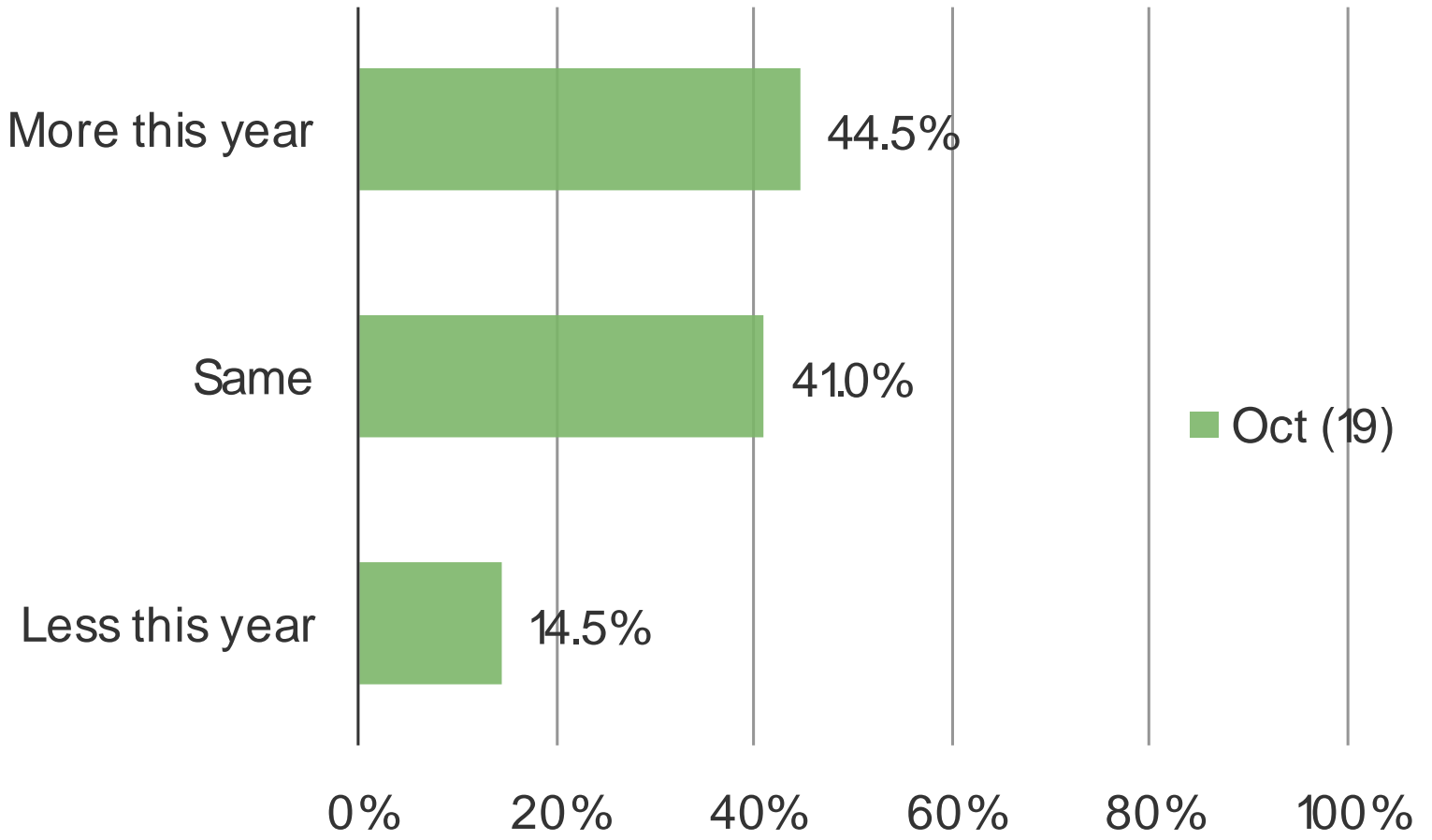
Posed to all respondents



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IS YOUR INCOME MORE OR LESS THIS YEAR THAN IN THE PREVIOUS YEAR?

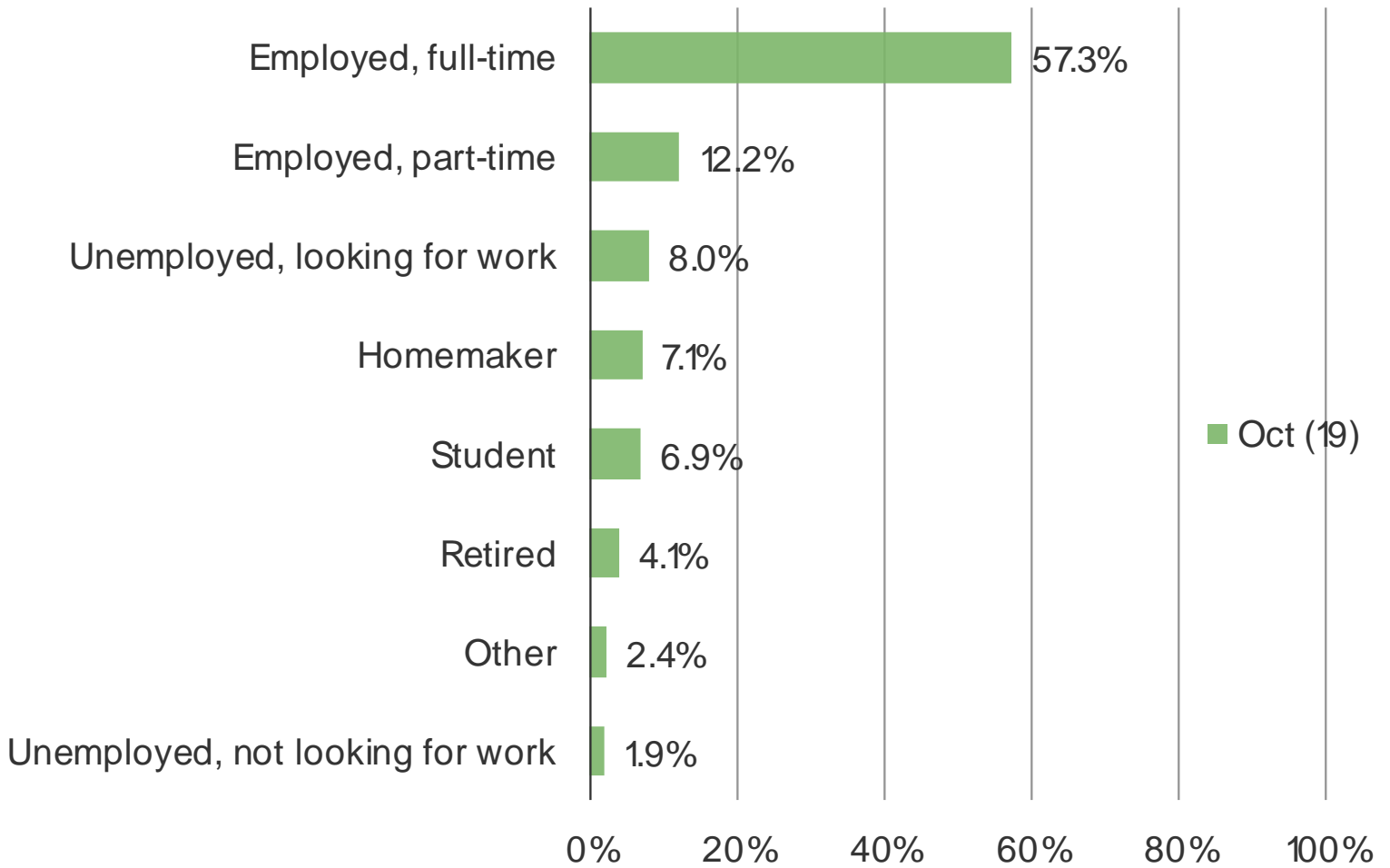
Posed to all respondents



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WHAT IS YOUR EMPLOYMENT STATUS?

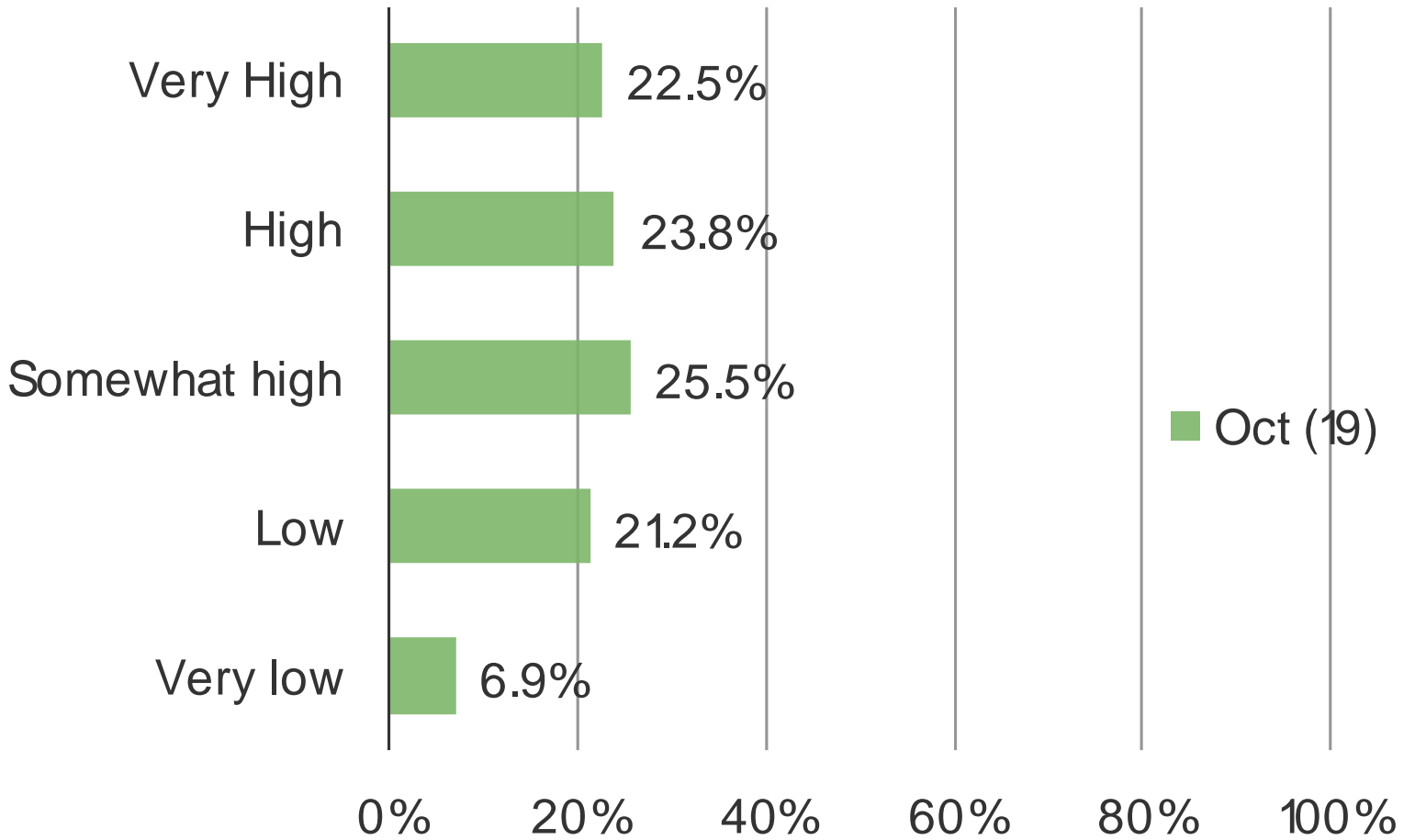
Posed to all respondents



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PLEASE EVALUATE YOUR CONFIDENCE ABOUT SPENDING MONEY AT THIS TIME

Posed to all respondents



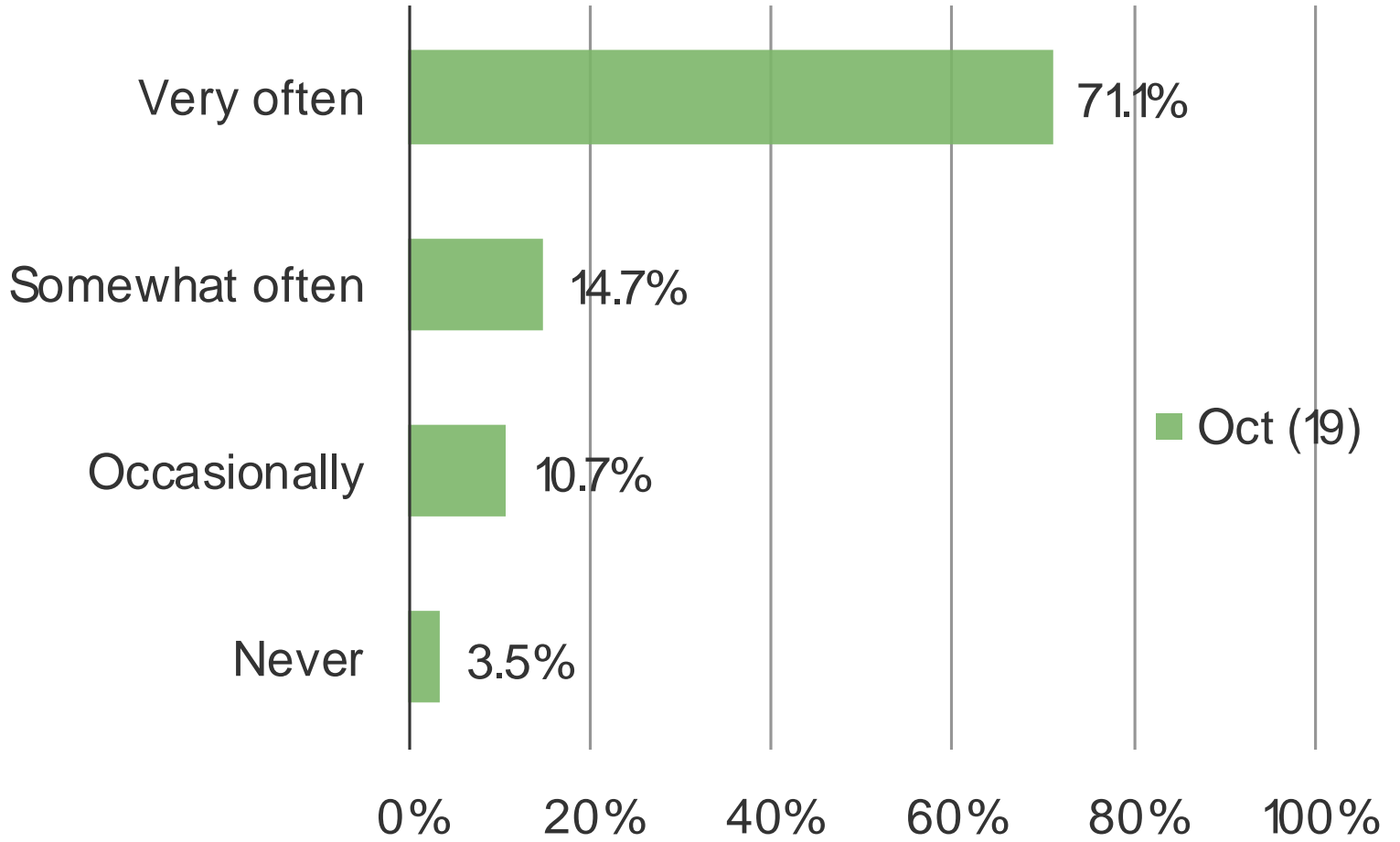
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INTERNET USAGE

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HOW OFTEN DO YOU ACCESS THE INTERNET?

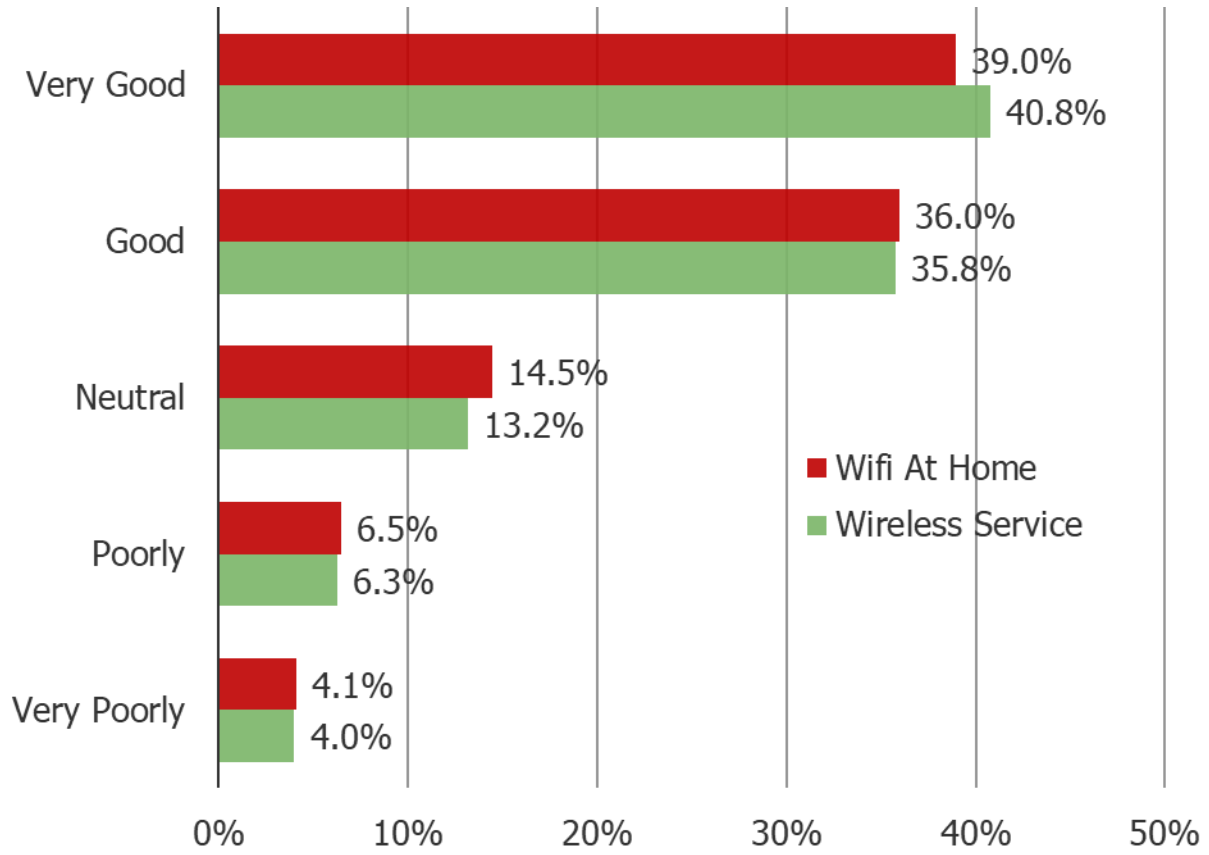
Posed to all respondents



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HOW WELL DOES THE INTERNET WORK ON YOUR DEVICE?

Posed to respondents who at least occasionally access the internet

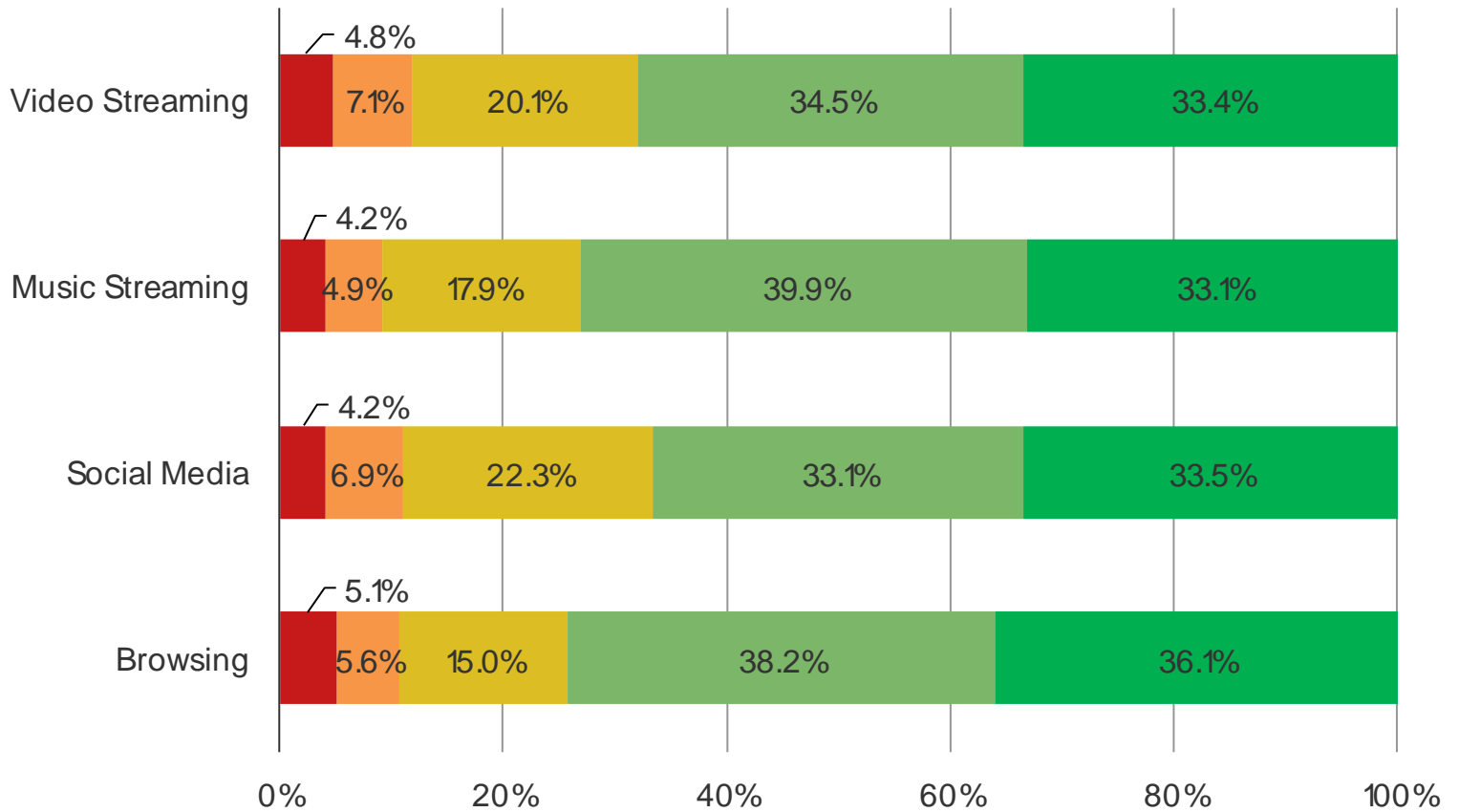


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HOW EFFECTIVE ARE THE SERVICES YOU USE TO CONNECT TO THE INTERNET?

Posed to respondents who at least occasionally access the internet

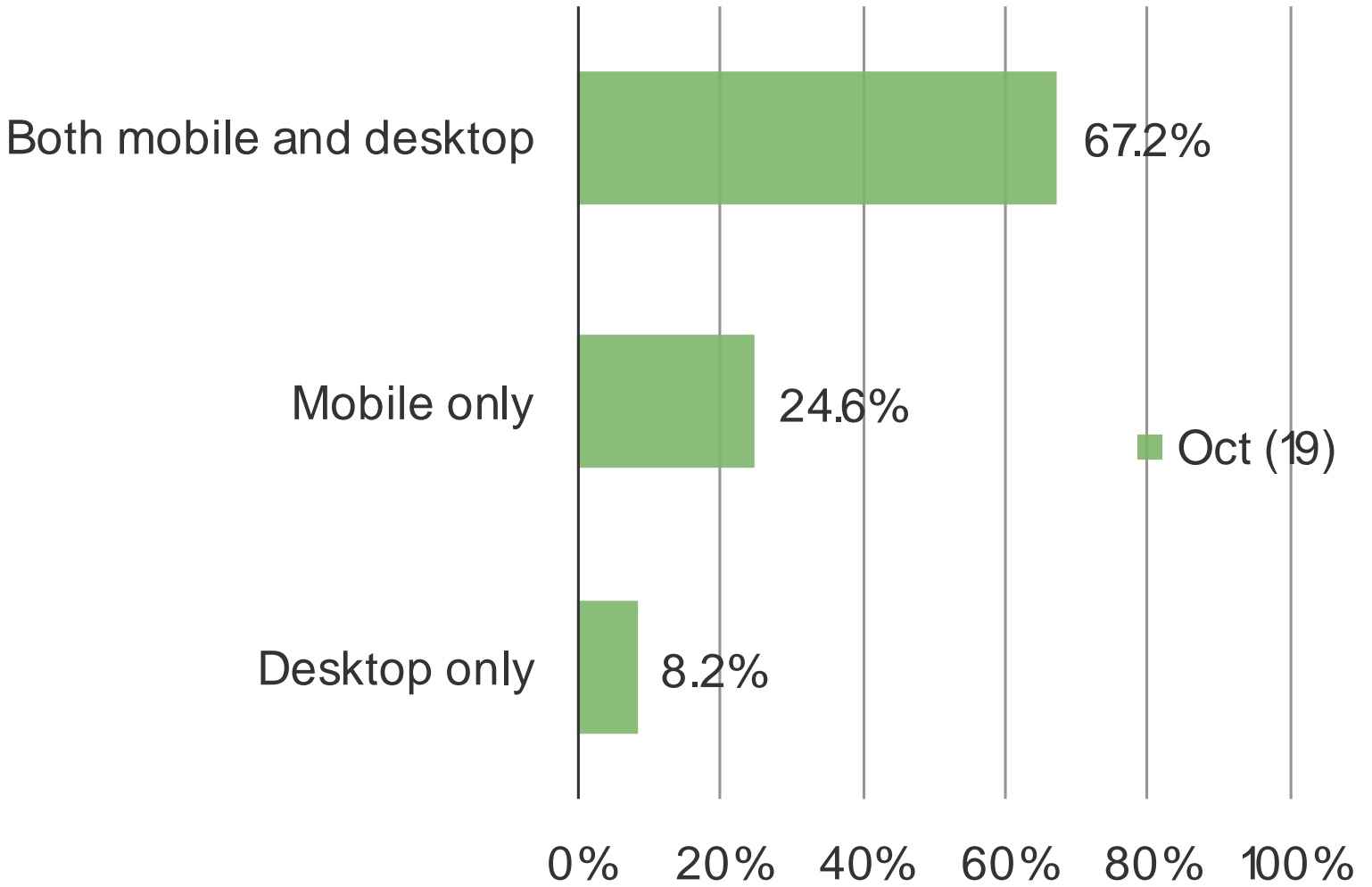
■ Very Unreliable
 ■ Unreliable
 ■ Somewhat Reliable
 ■ Reliable
 ■ Very Reliable



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HOW DO YOU LIKE ACCESSING THE INTERNET?

Posed to respondents who at least occasionally access the internet



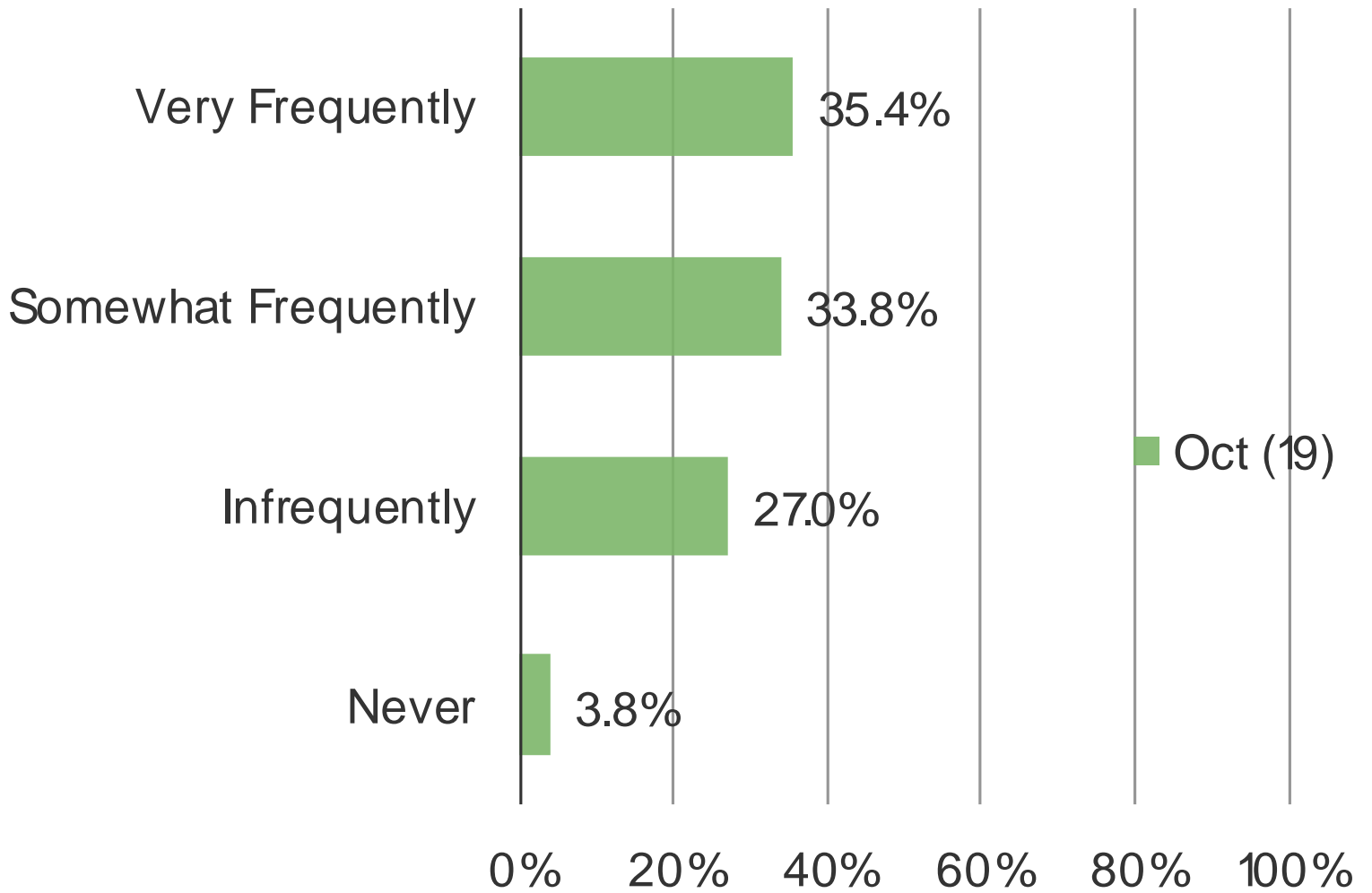
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TV/MOVIE WATCHING

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HOW OFTEN DO YOU WATCH TELEVISION OR MOVIES?

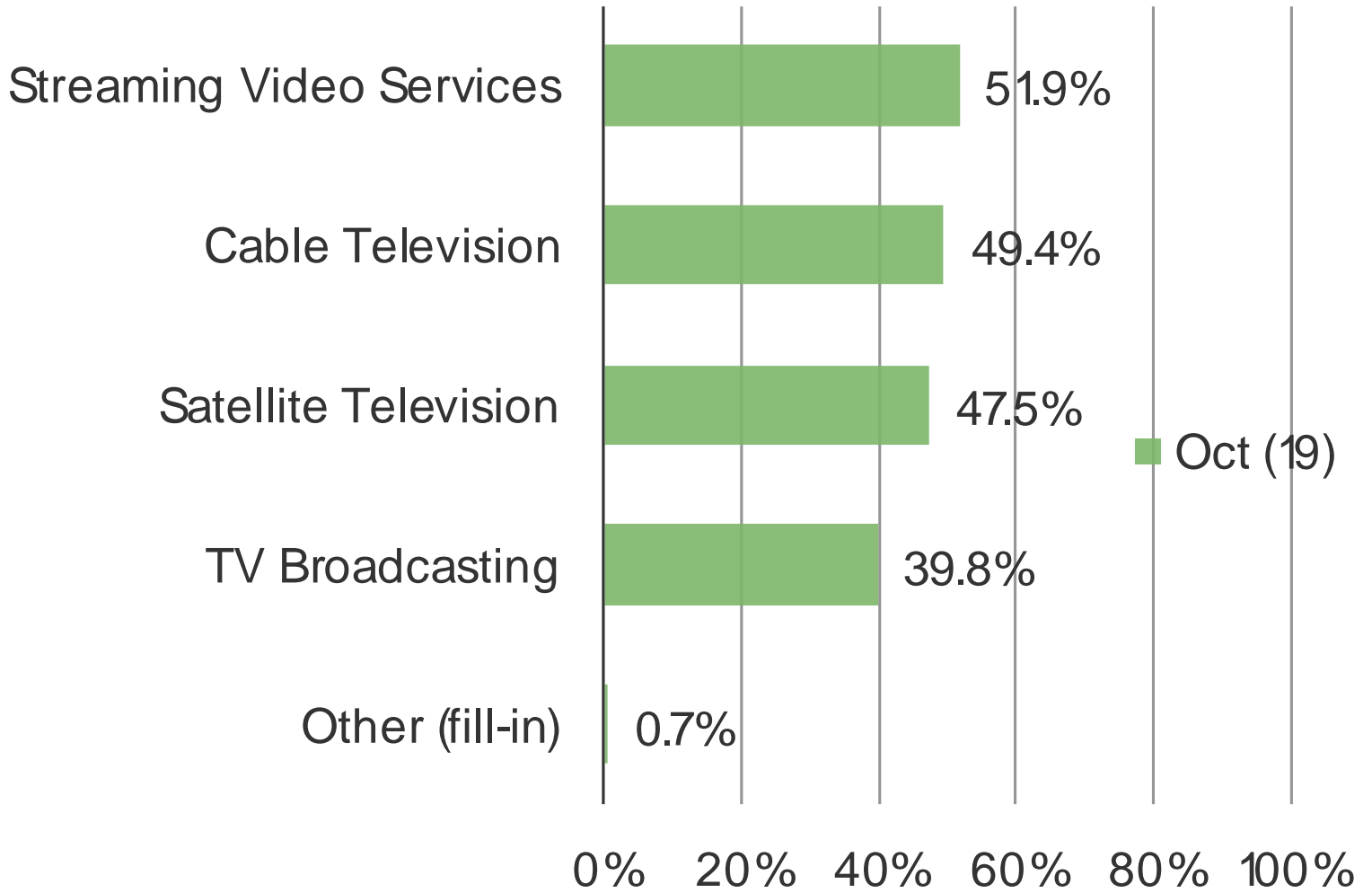
Posed to all respondents



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HOW DO YOU USUALLY WATCH TELEVISION SHOWS? (SELECT ALL THAT APPLY)

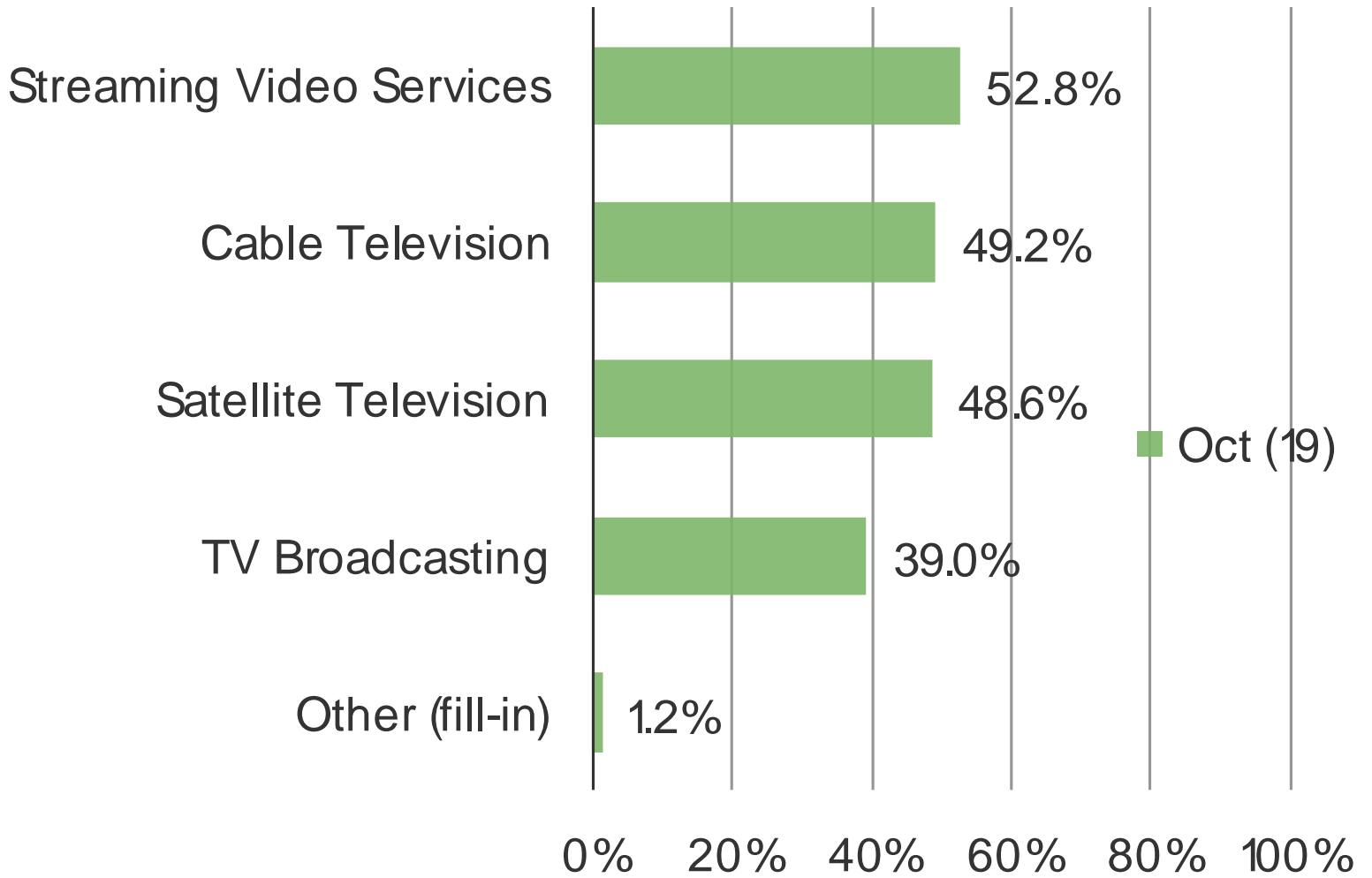
Posed to respondents who watch TV or movies



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HOW DO YOU USUALLY WATCH TELEVISION MOVIES? (SELECT ALL THAT APPLY)

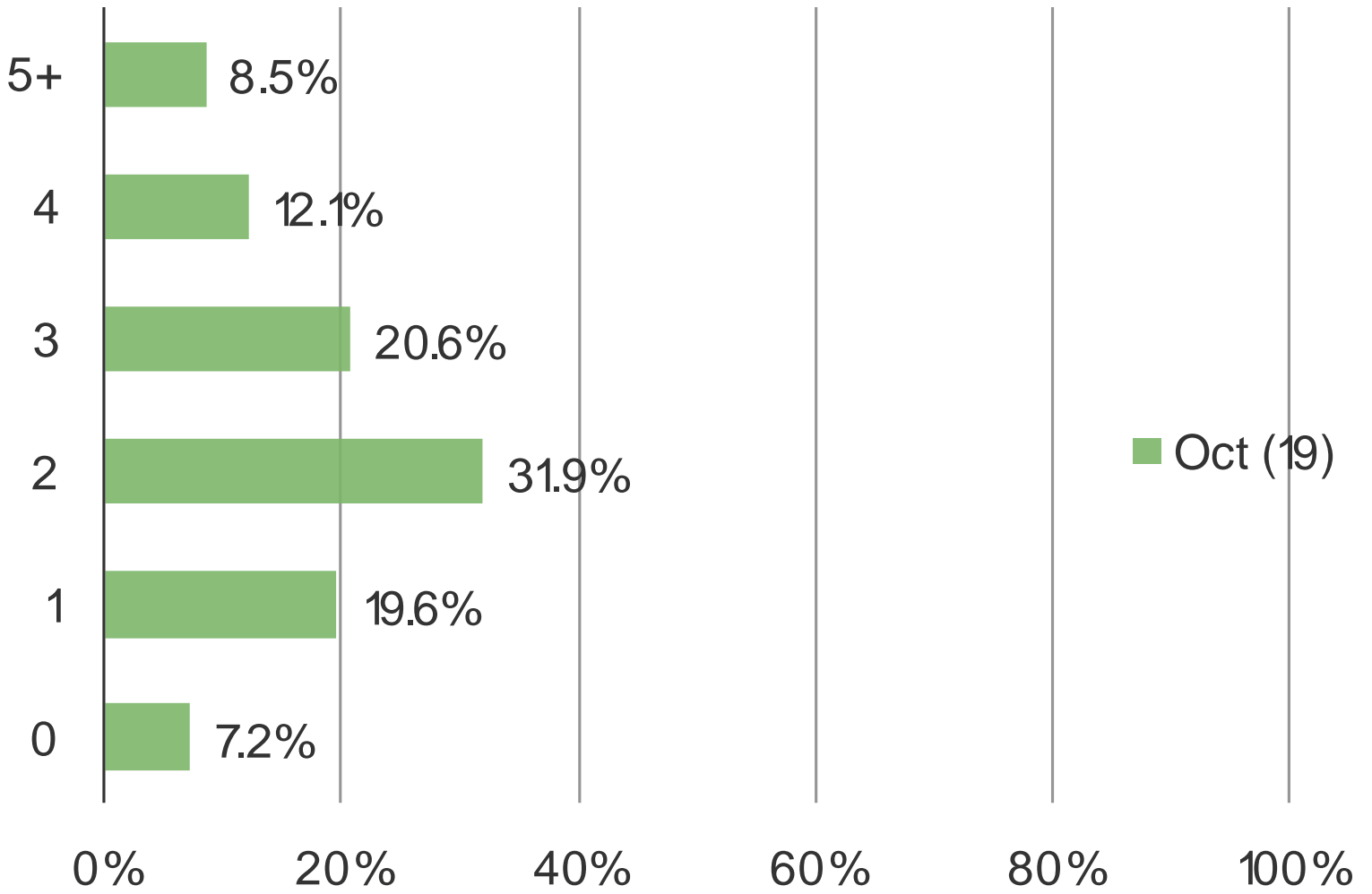
Posed to respondents who watch TV or movies



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HOW MANY STREAMING VIDEO SERVICES DO YOU CURRENTLY USE?

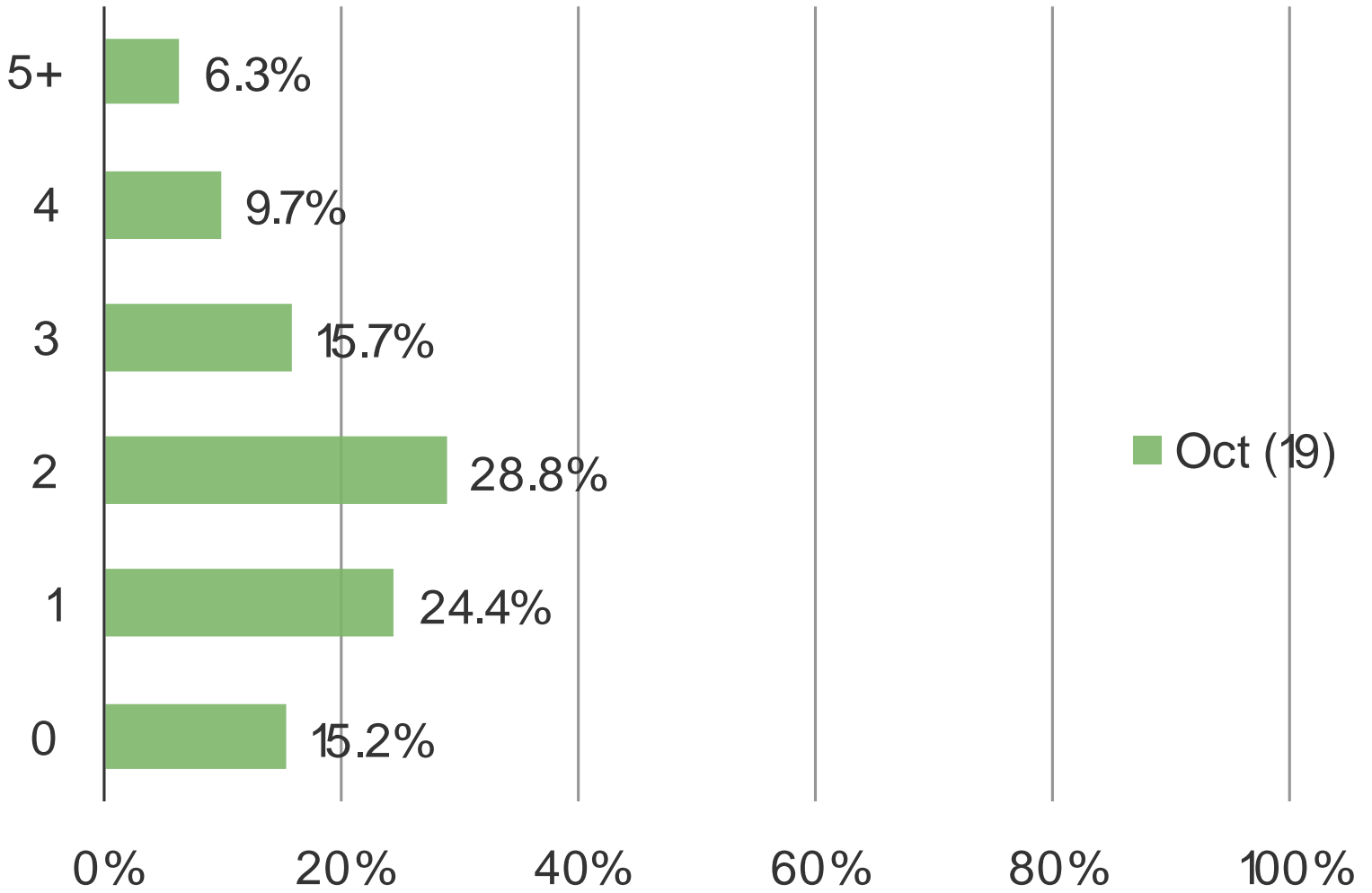
Posed to all respondents



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HOW MANY STREAMING VIDEO SERVICES DO YOU CURRENTLY PAY FOR?

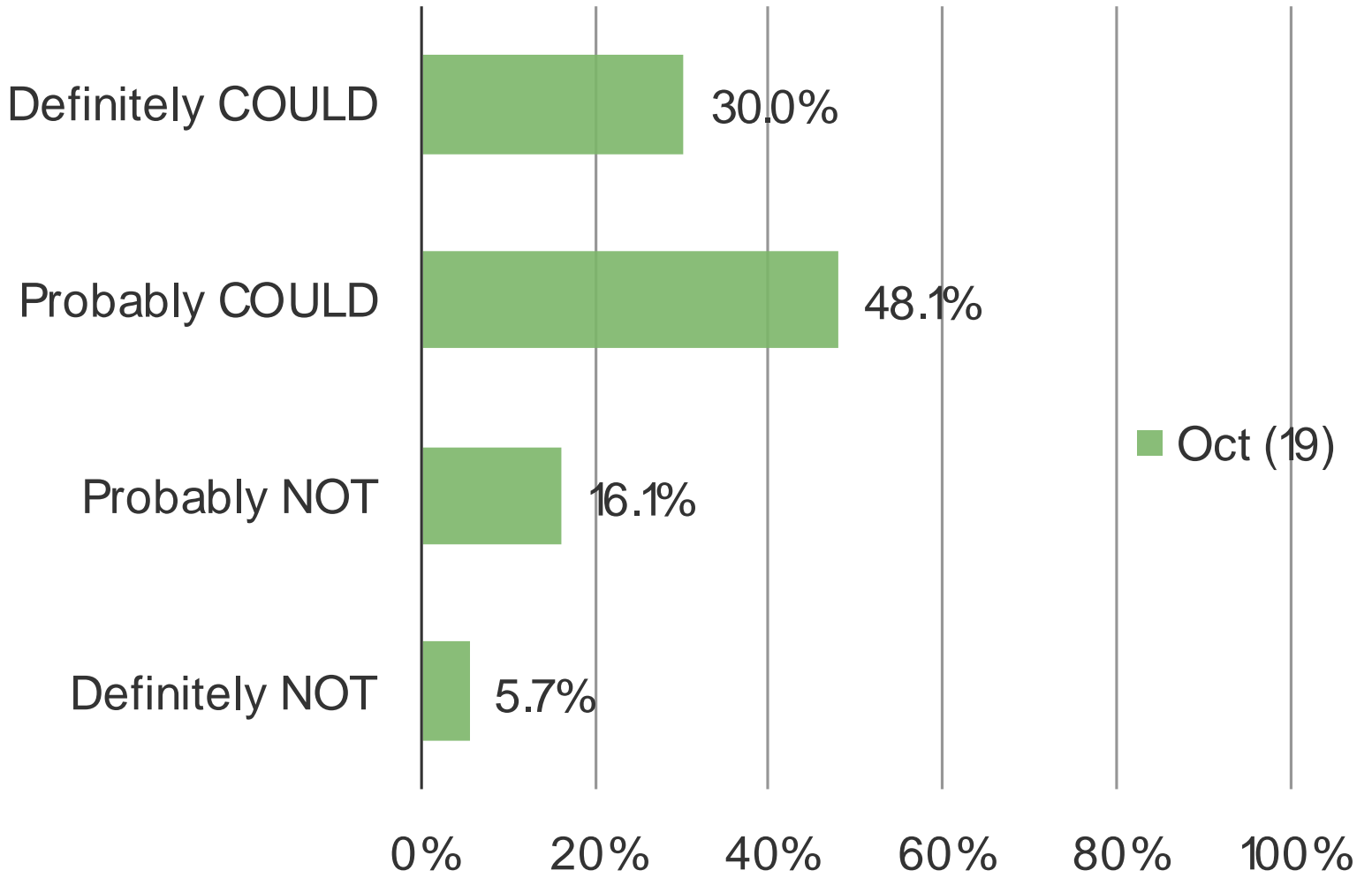
Posed to all respondents



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CAN YOU AFFORD TO ADD ANOTHER PAID VIDEO SERVICE RIGHT NOW?

Posed to respondents who pay for video streaming services themselves



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WHEN YOU THINK OF STREAMING VIDEO SERVICES, WHICH IS THE FIRST THAT COMES TO MIND?

Posed to all respondents



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WHAT IS YOUR FAVORITE VIDEO CONTENT (TV OR MOVIE) TO WATCH RIGHT NOW?

Posed to all respondents



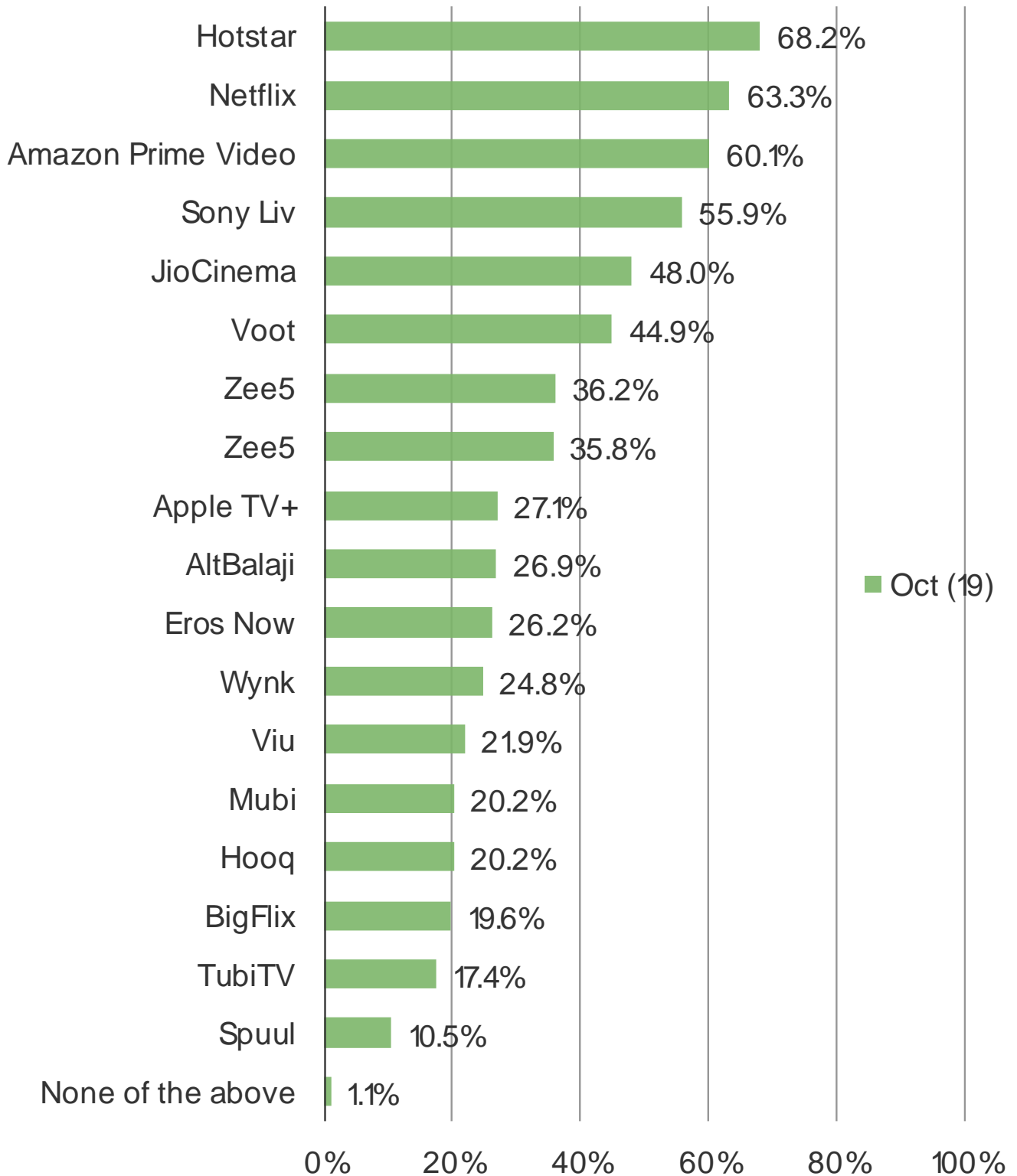
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STREAMING VIDEO AWARENESS AND ACCOUNT HOLDERS

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WHICH OF THE FOLLOWING STREAMING VIDEO SERVICES HAVE YOU HEARD OF?

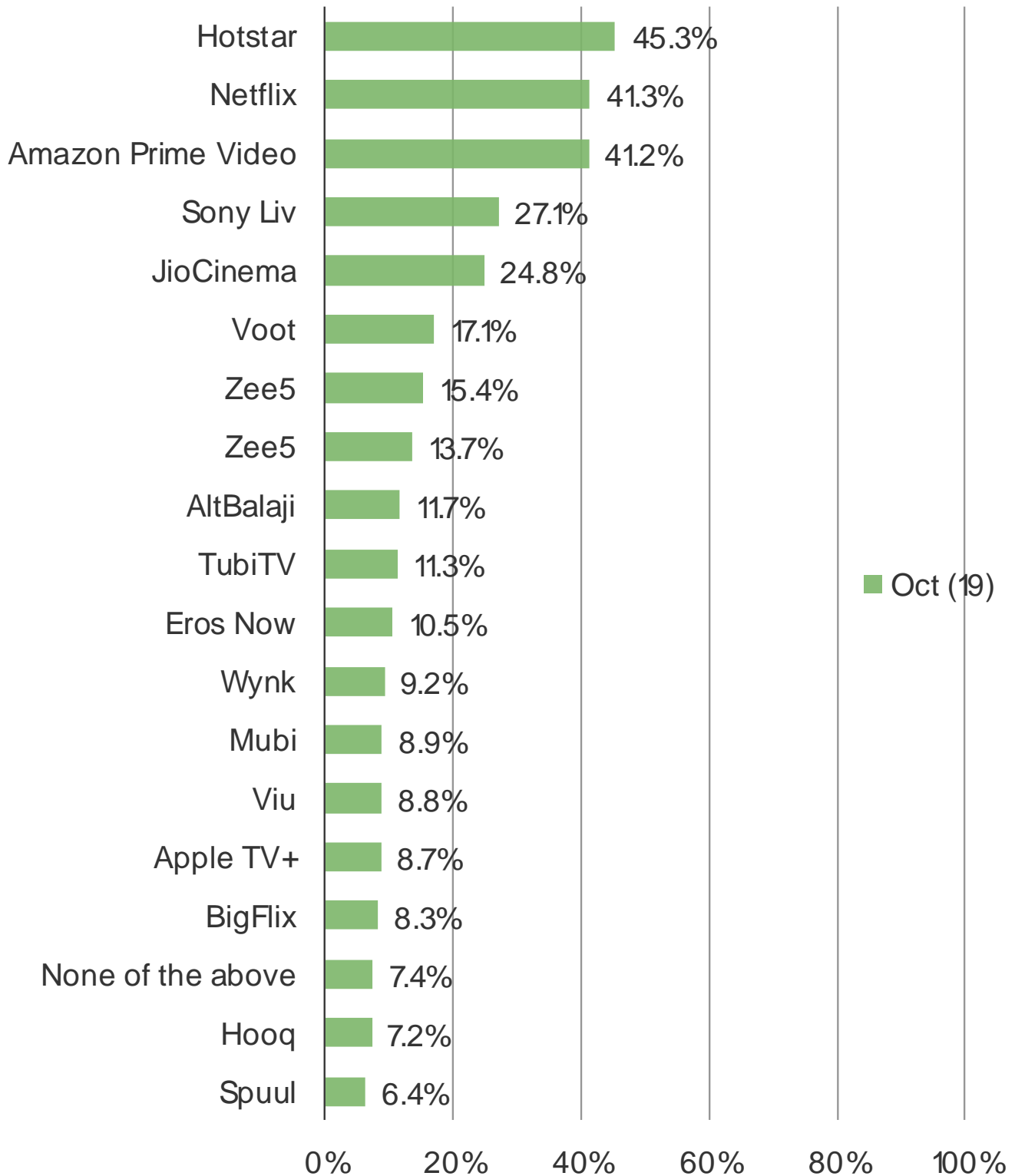
Posed to all respondents



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DO YOU CURRENTLY HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents



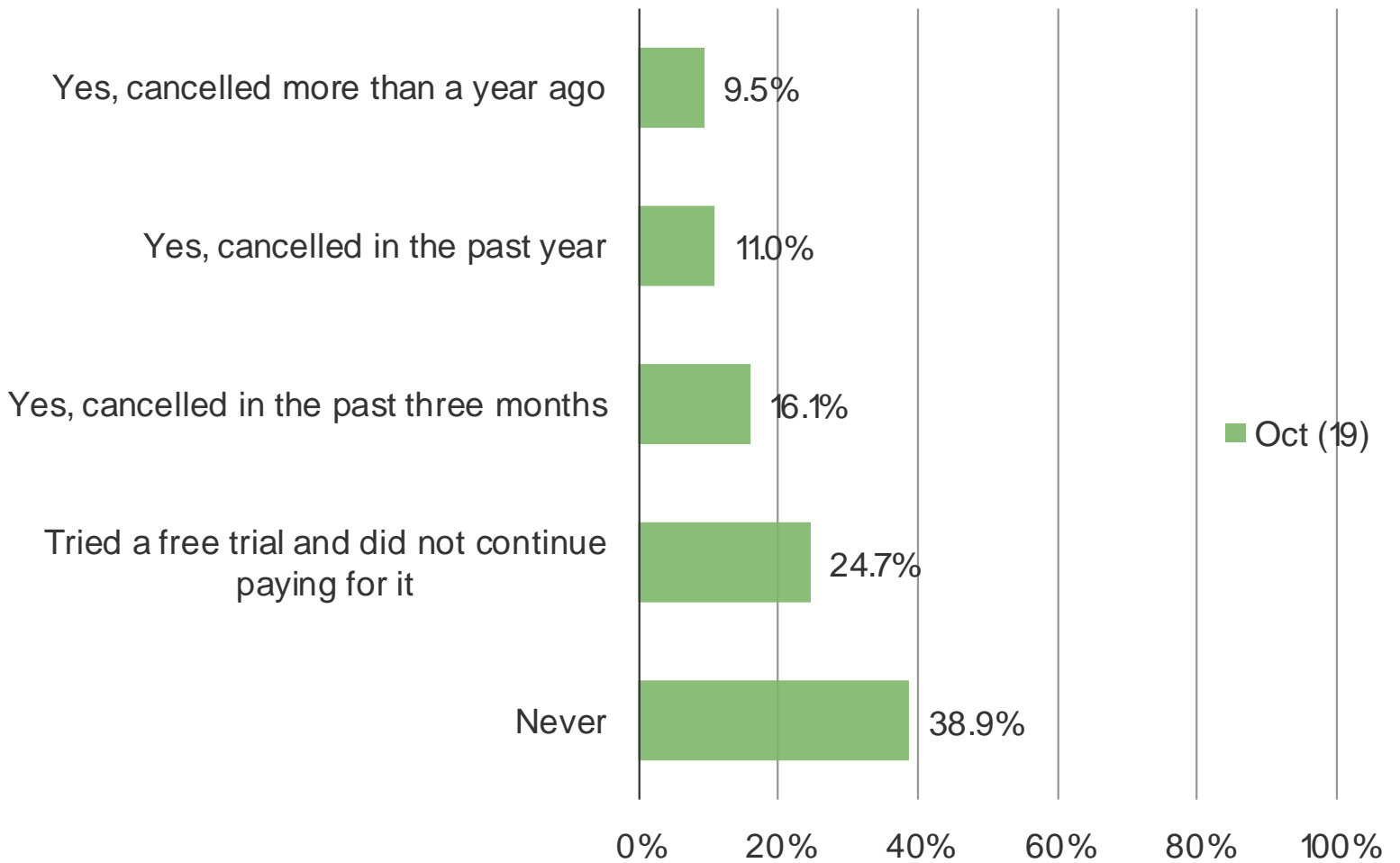
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NON-NETFLIX SUBSCRIBERS

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HAVE YOU EVER PAID TO SUBSCRIBE TO NETFLIX IN THE PAST?

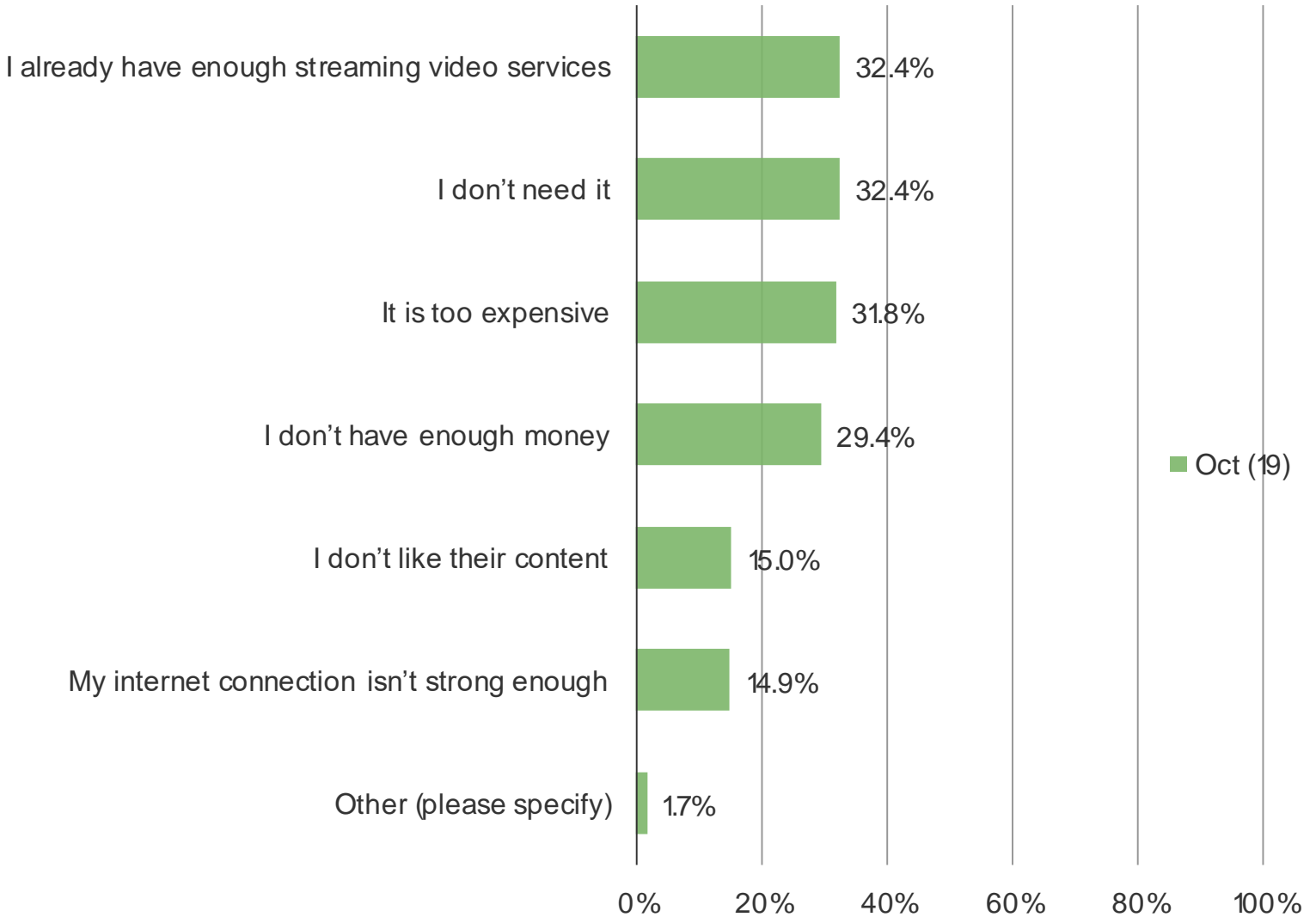
Posed to non-Netflix subscribers



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WHY ARE YOU CURRENTLY NOT A NETFLIX SUBSCRIBER? (SELECT ALL THAT APPLY)

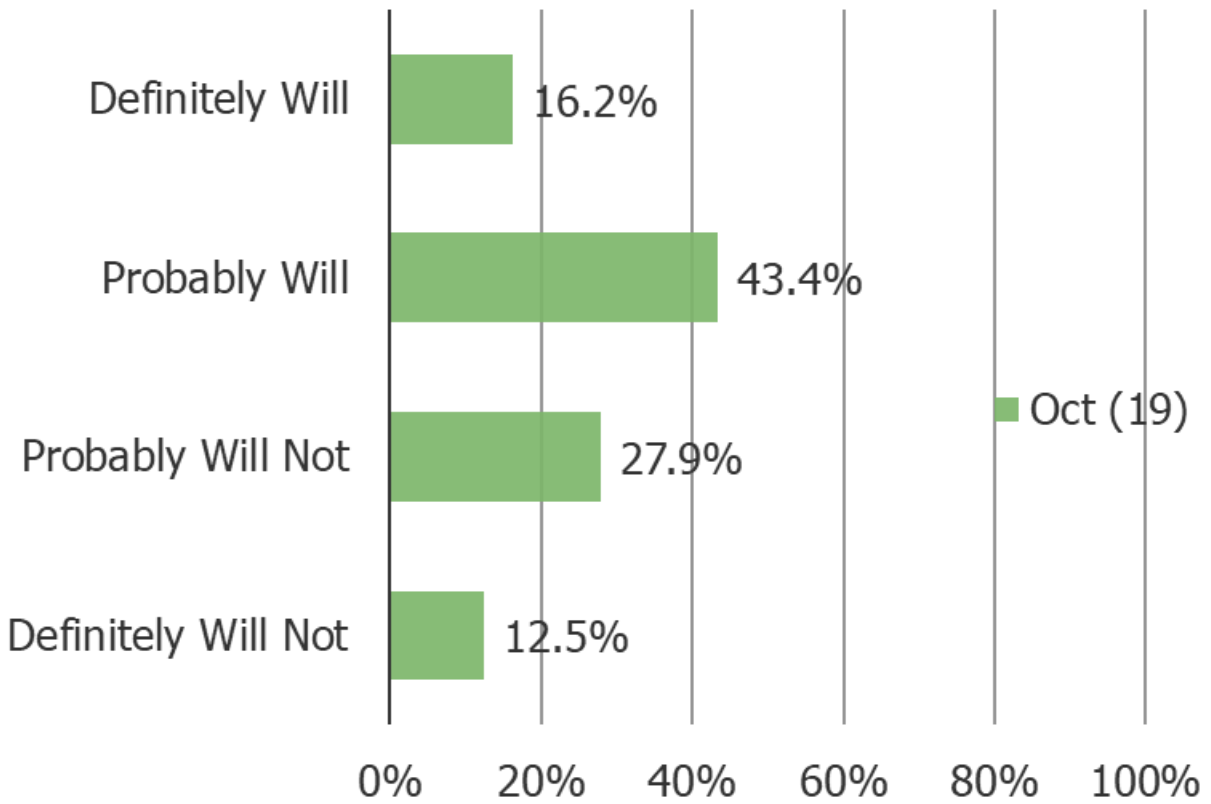
Posed to non-Netflix subscribers



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HOW LIKELY ARE YOU TO START AN ACCOUNT WITH NETFLIX IN THE NEXT THREE MONTHS?

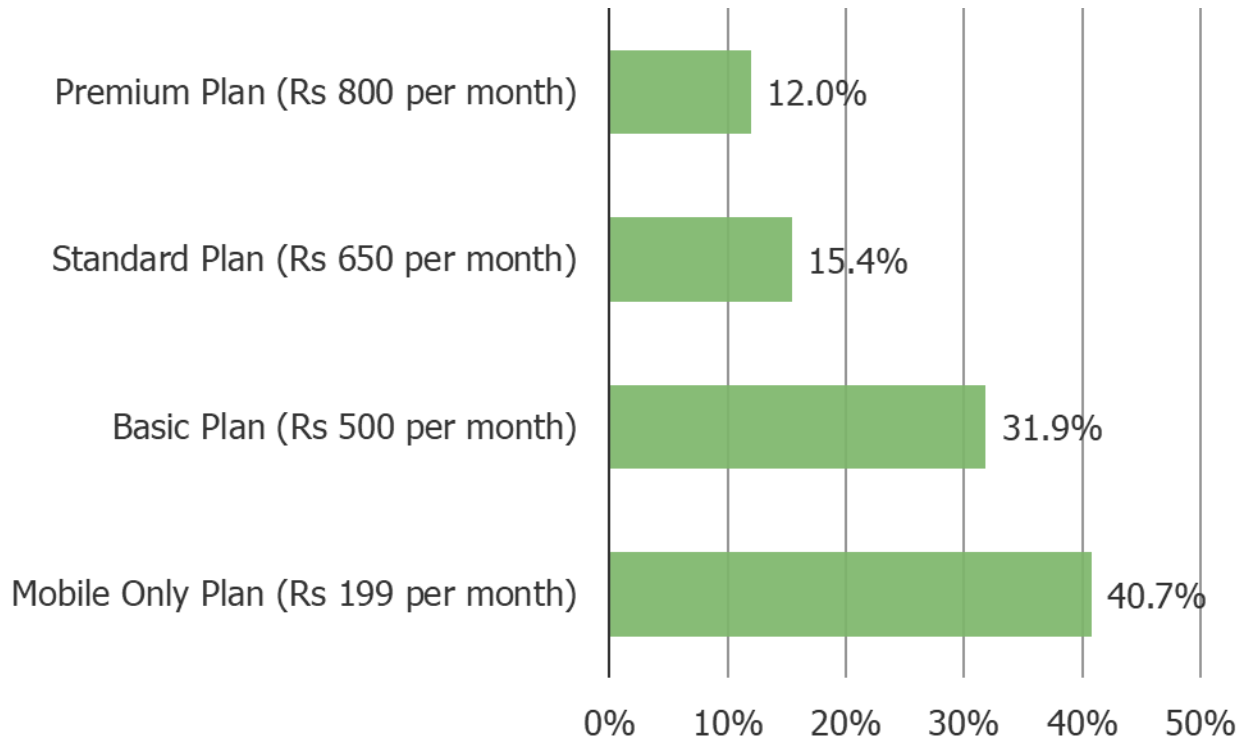
Posed to non-Netflix subscribers



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WHICH OF THE FOLLOWING PLANS WOULD YOU BE MOST LIKELY TO SIGN UP FOR?

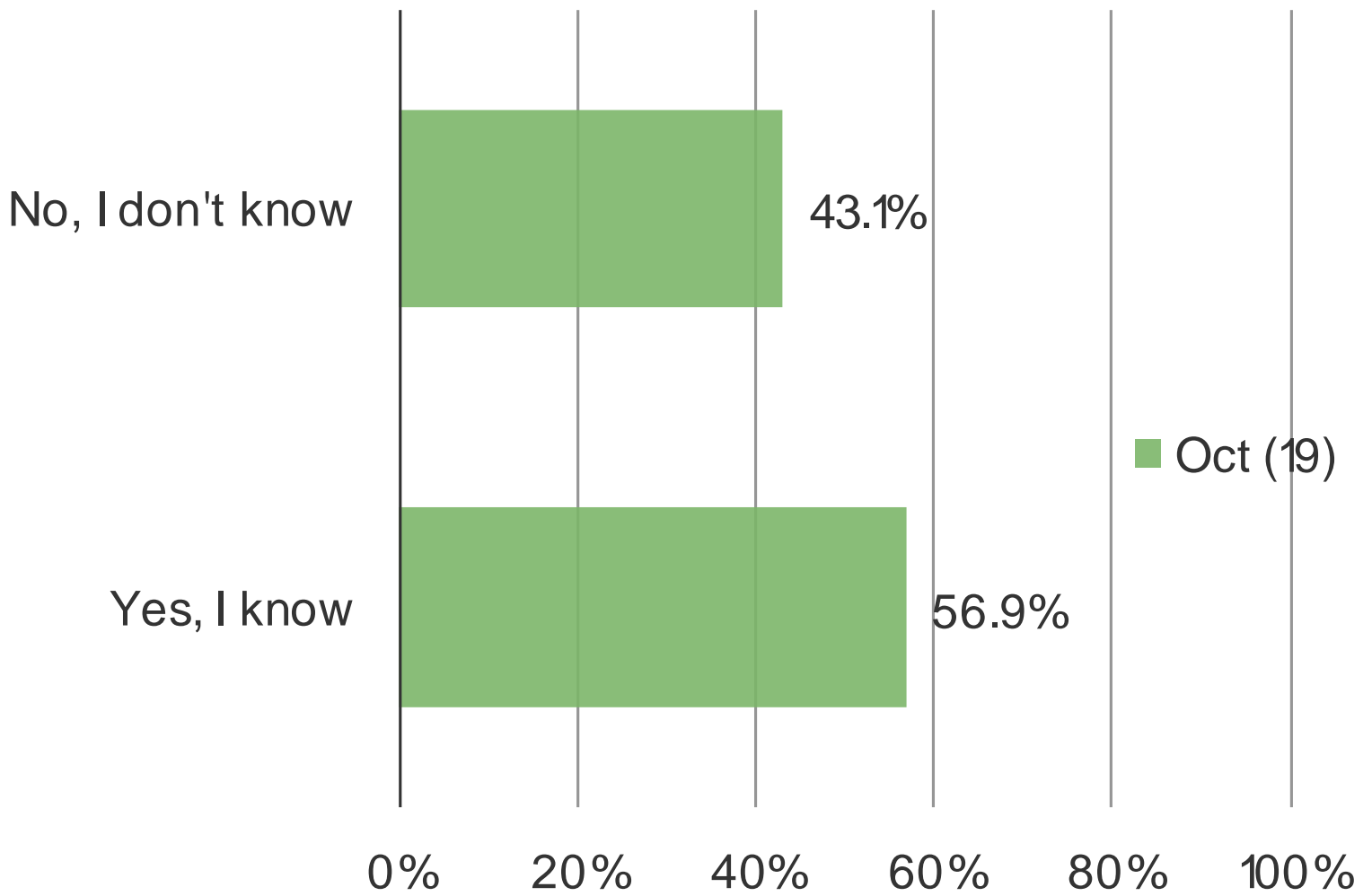
Posed to non-Netflix subscribers who probably will or definitely will sign up



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DID YOU KNOW THAT NETFLIX HAS STARTED TO OFFER FREE ACCESS TO A LIMITED NUMBER OF ORIGINAL SHOWS FOR CONSUMERS IN INDIA?

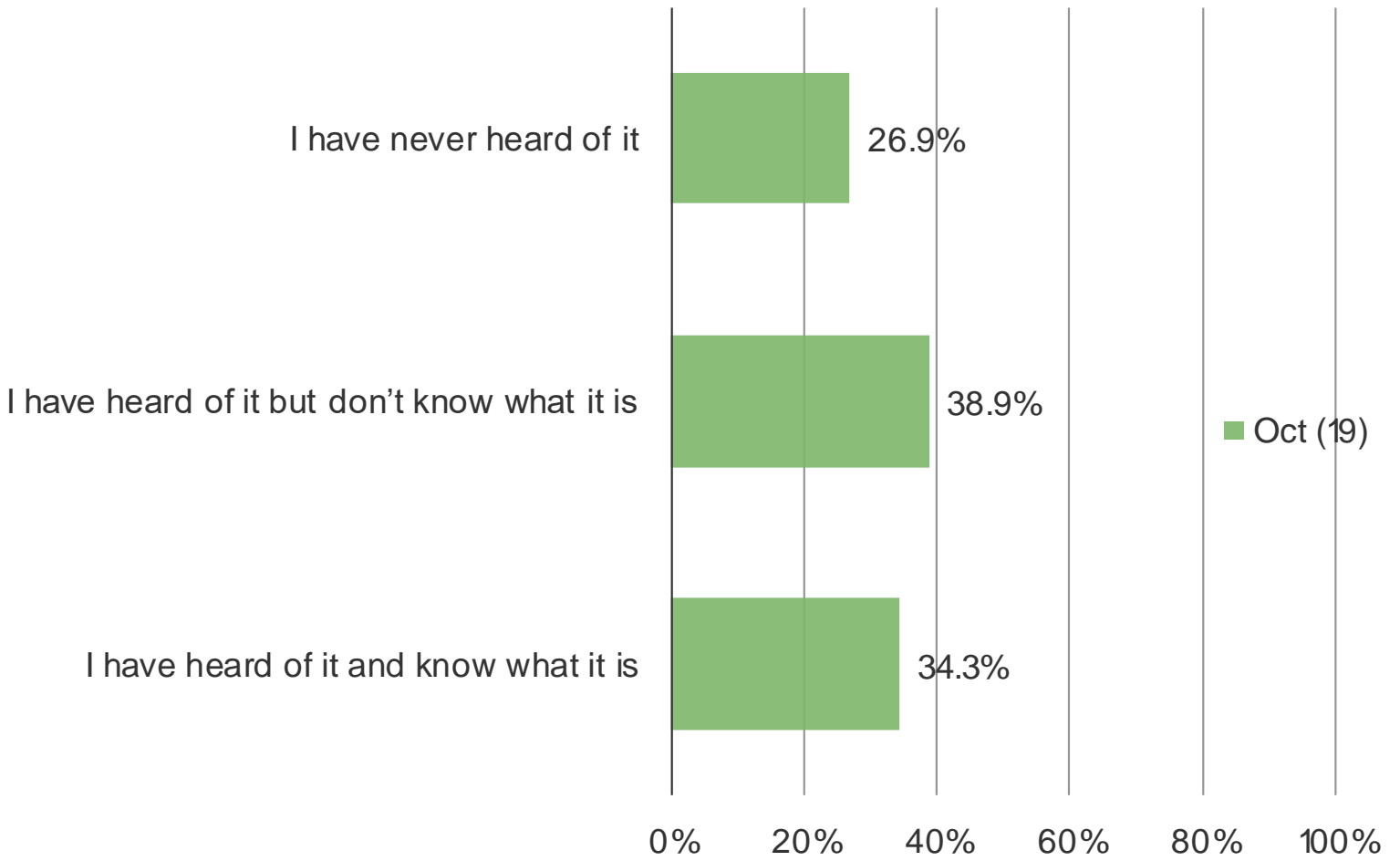
Posed to non-Netflix subscribers



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HAVE YOU HEARD OF THE NETFLIX SHOW “BARD OF BLOOD”?

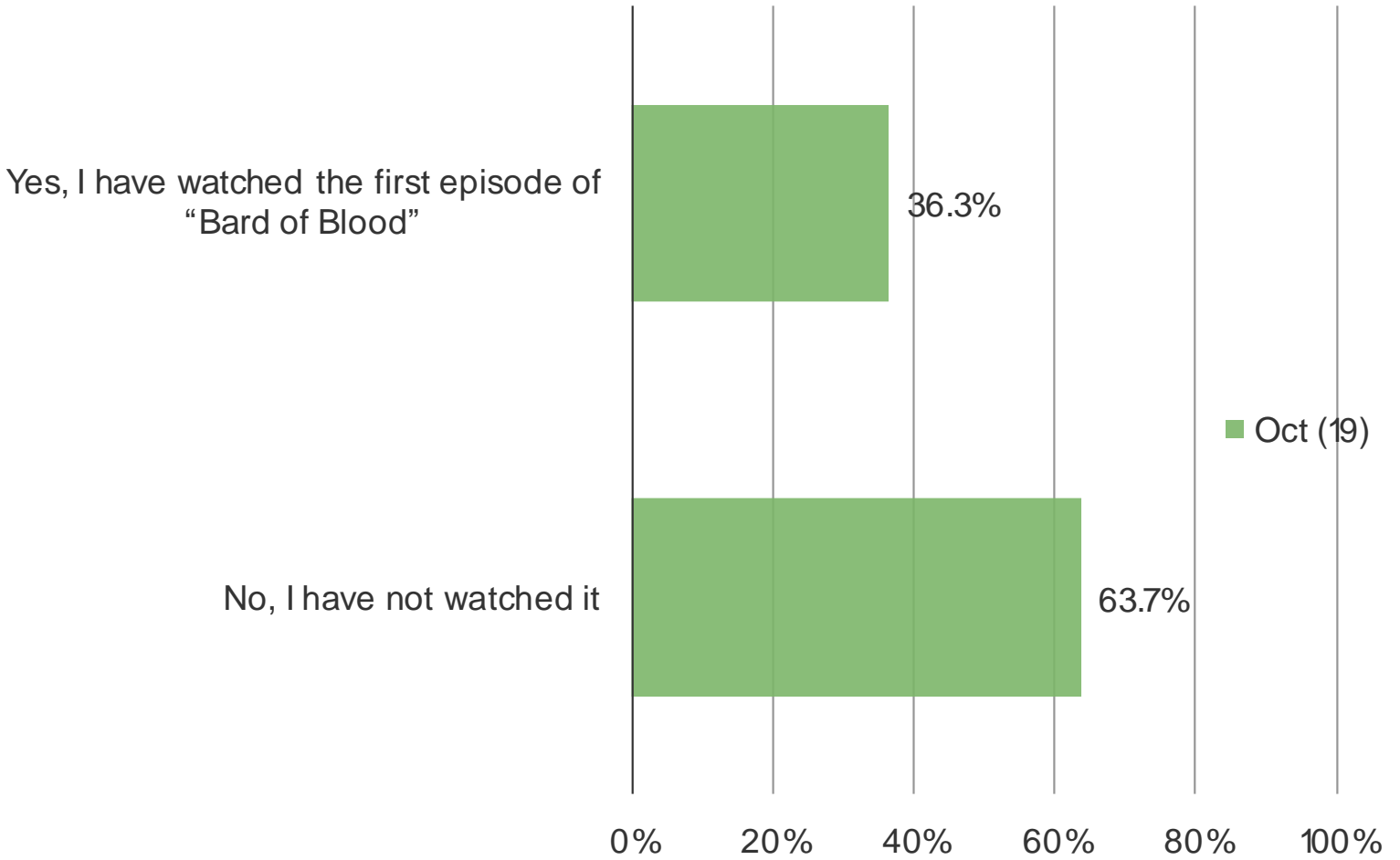
Posed to non-Netflix subscribers



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HAVE YOU WATCHED THE FIRST EPISODE OF THE NETFLIX SERIES "BARD OF BLOOD"?

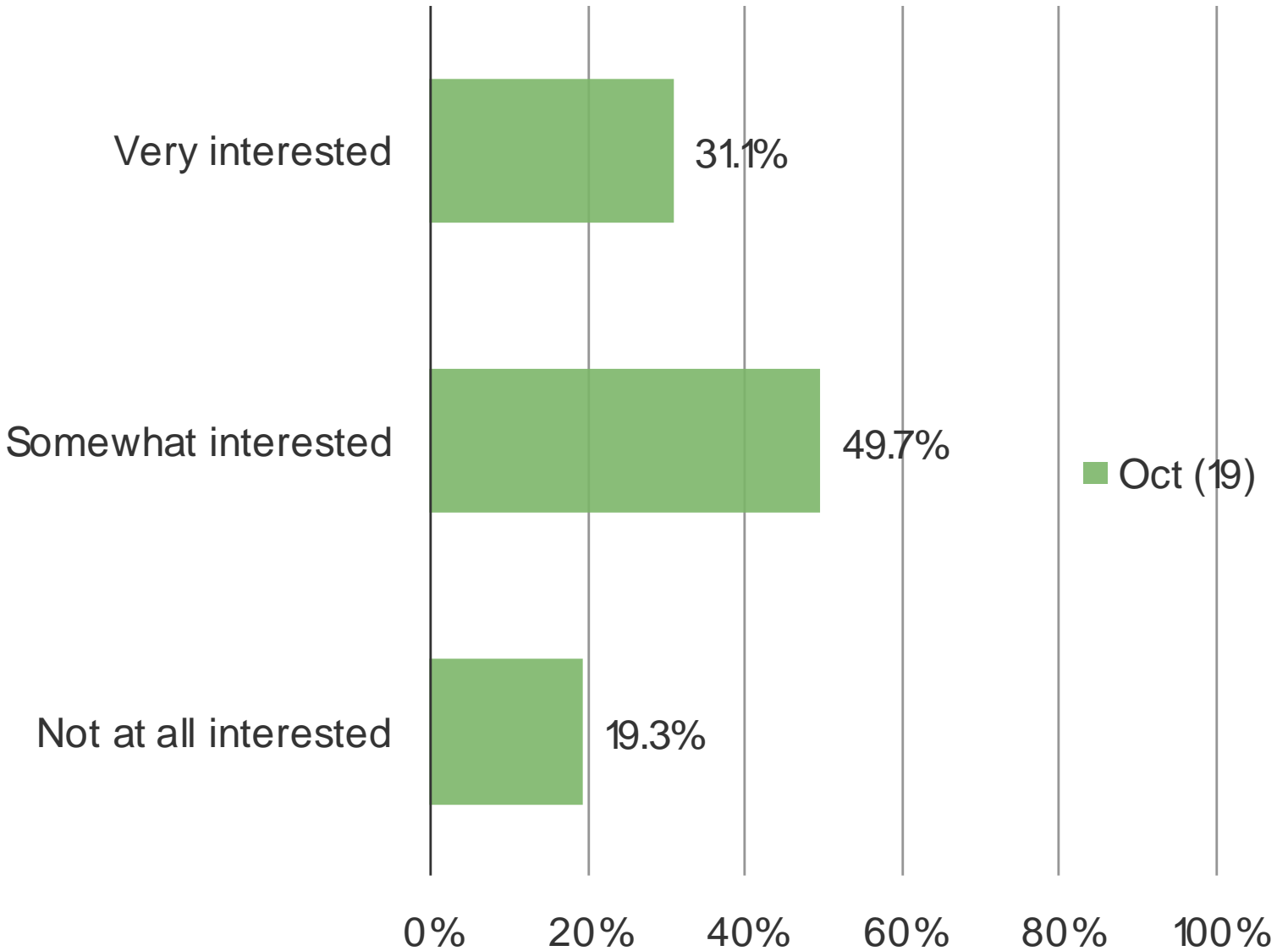
Posed to non-Netflix subscribers



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HOW INTERESTED ARE YOU IN CHECKING OUT FREE CONTENT FROM NETFLIX ON A LIMITED BASIS FOR THEIR SHOWS?

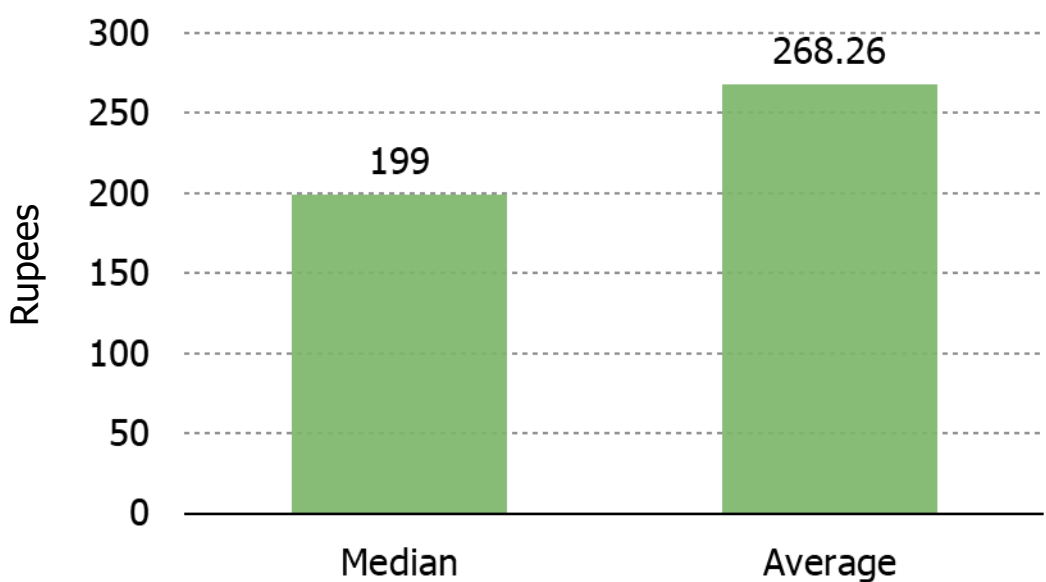
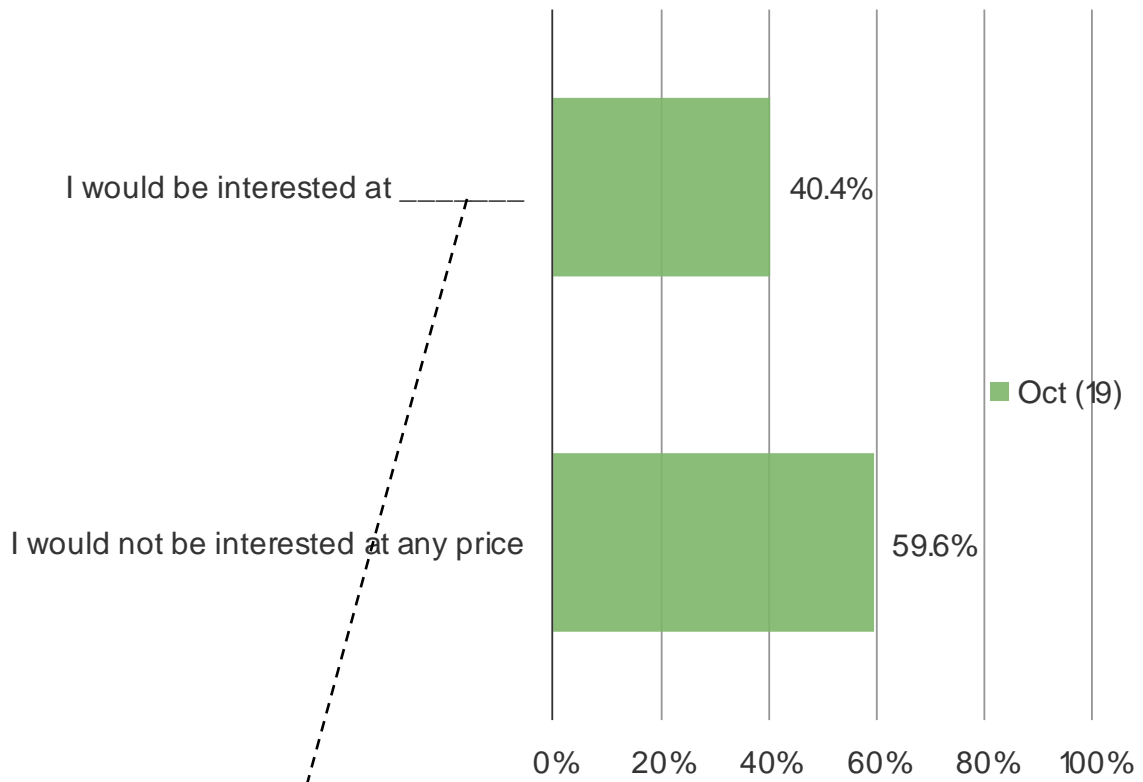
Posed to non-Netflix subscribers



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AT WHAT PRICE PER MONTH WOULD IT MAKE SENSE FOR YOU TO PAY FOR NETFLIX?

Posed to non-Netflix subscribers

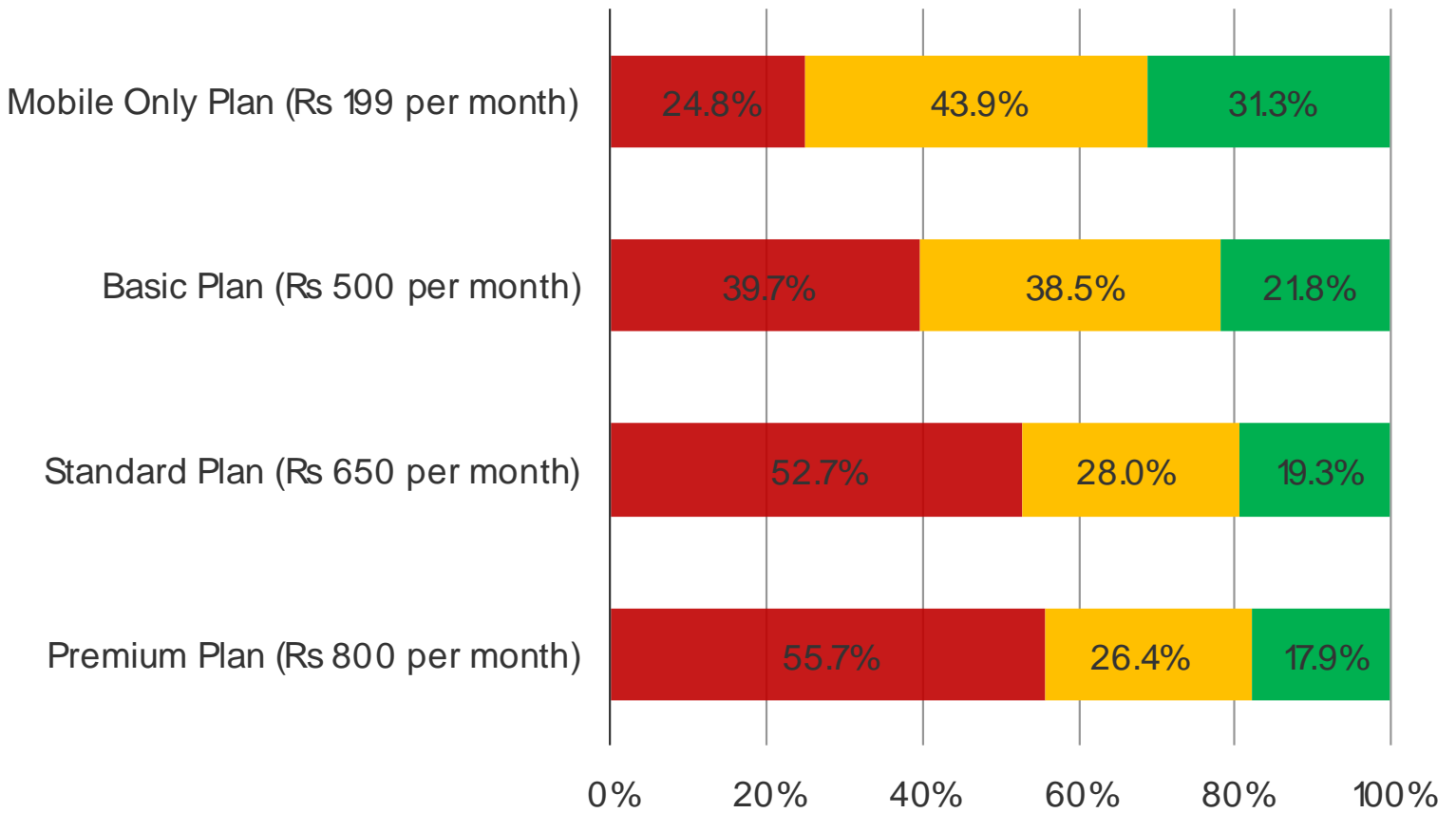


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HOW INTERESTED WOULD YOU BE IN SIGNING UP FOR NETFLIX AT THE FOLLOWING PRICE POINTS?

Posed to non-Netflix subscribers

■ Not Interested ■ Somewhat Interested ■ Very Interested



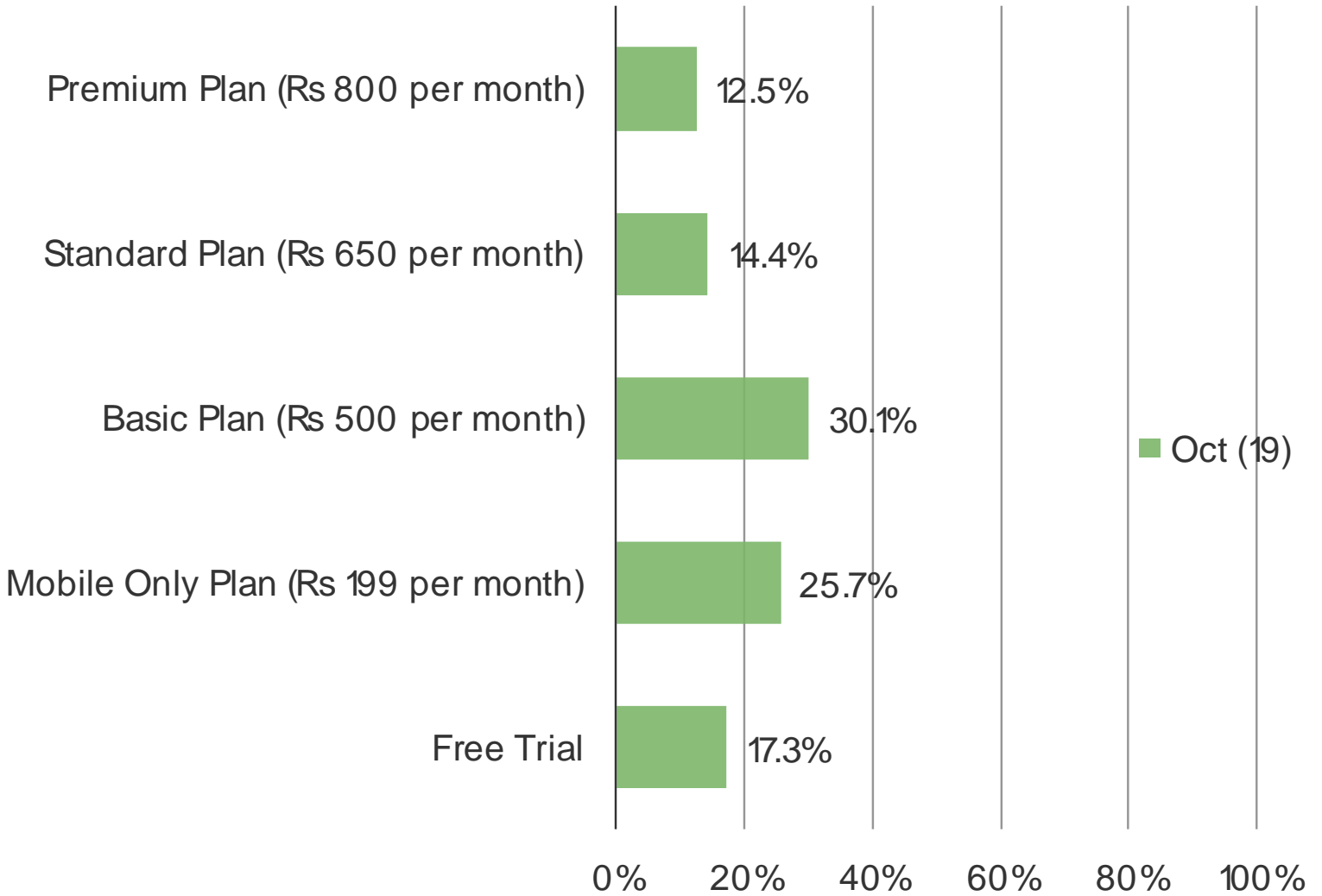
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NETFLIX SUBSCRIBERS

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WHICH NETFLIX PLAN ARE YOU SUBSCRIBED TO?

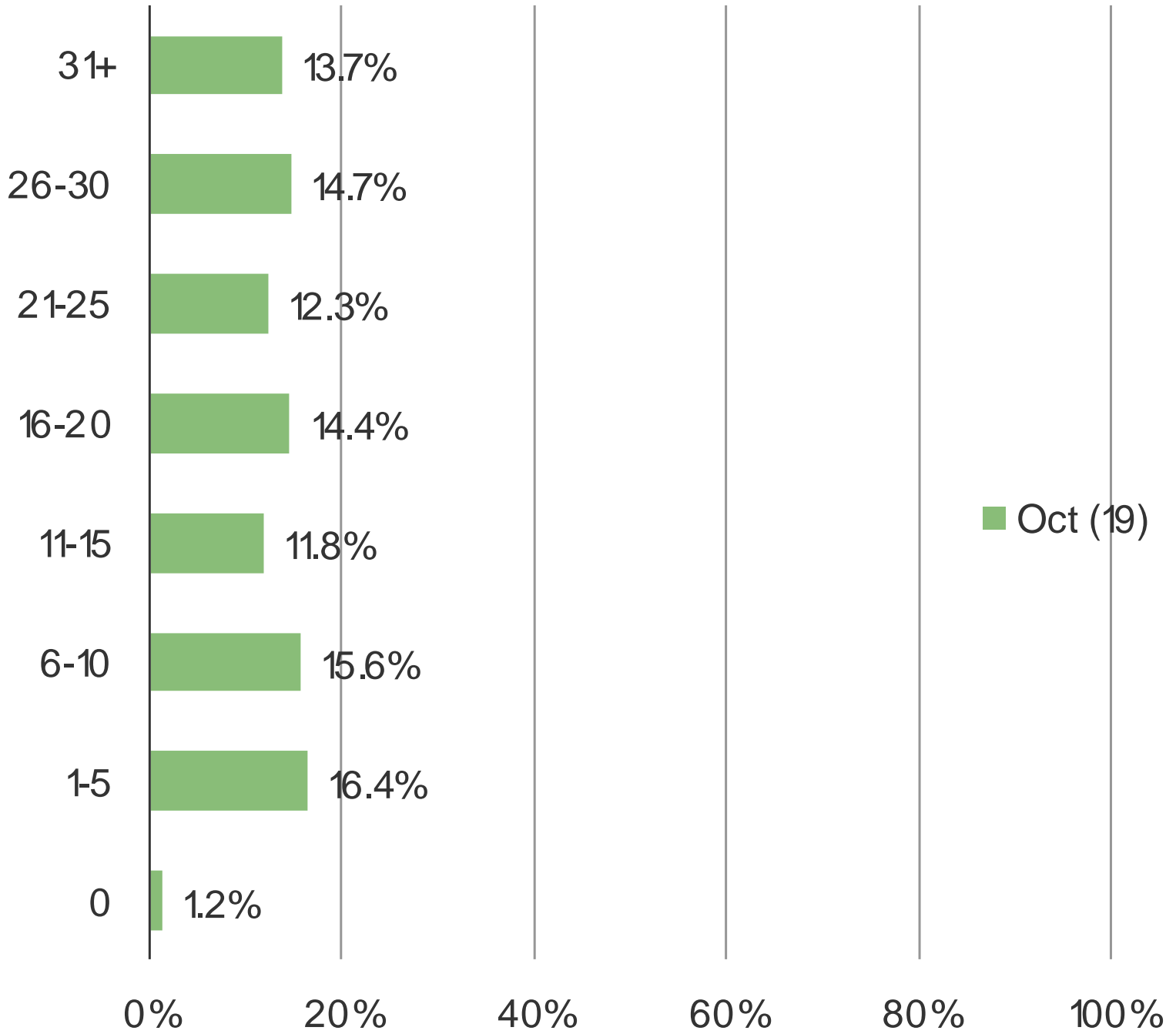
Posed to Netflix subscribers



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

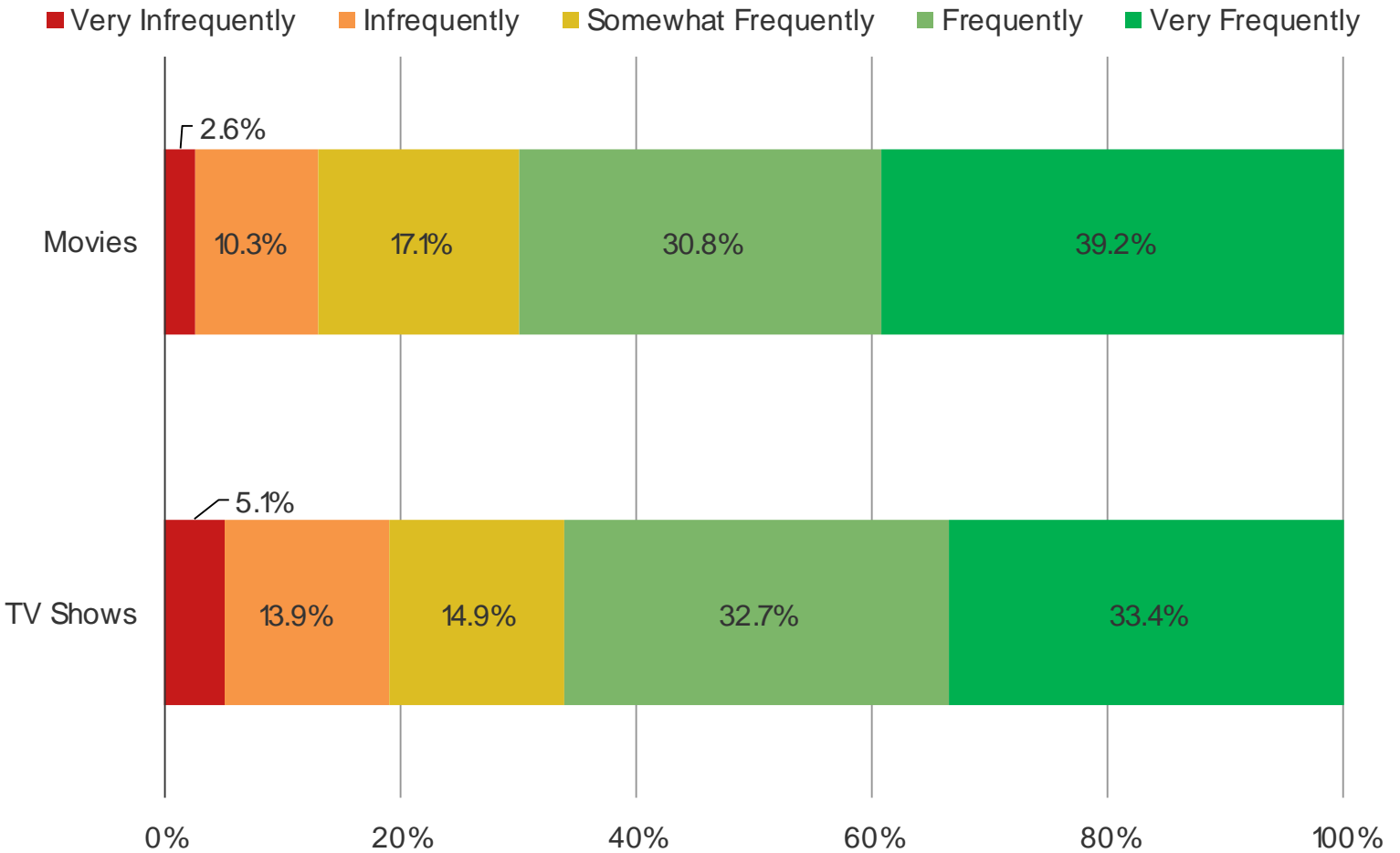
Posed to Netflix subscribers



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ON AVERAGE, HOW FREQUENTLY DO YOU USE NETFLIX TO WATCH TV SHOWS AND MOVIES?

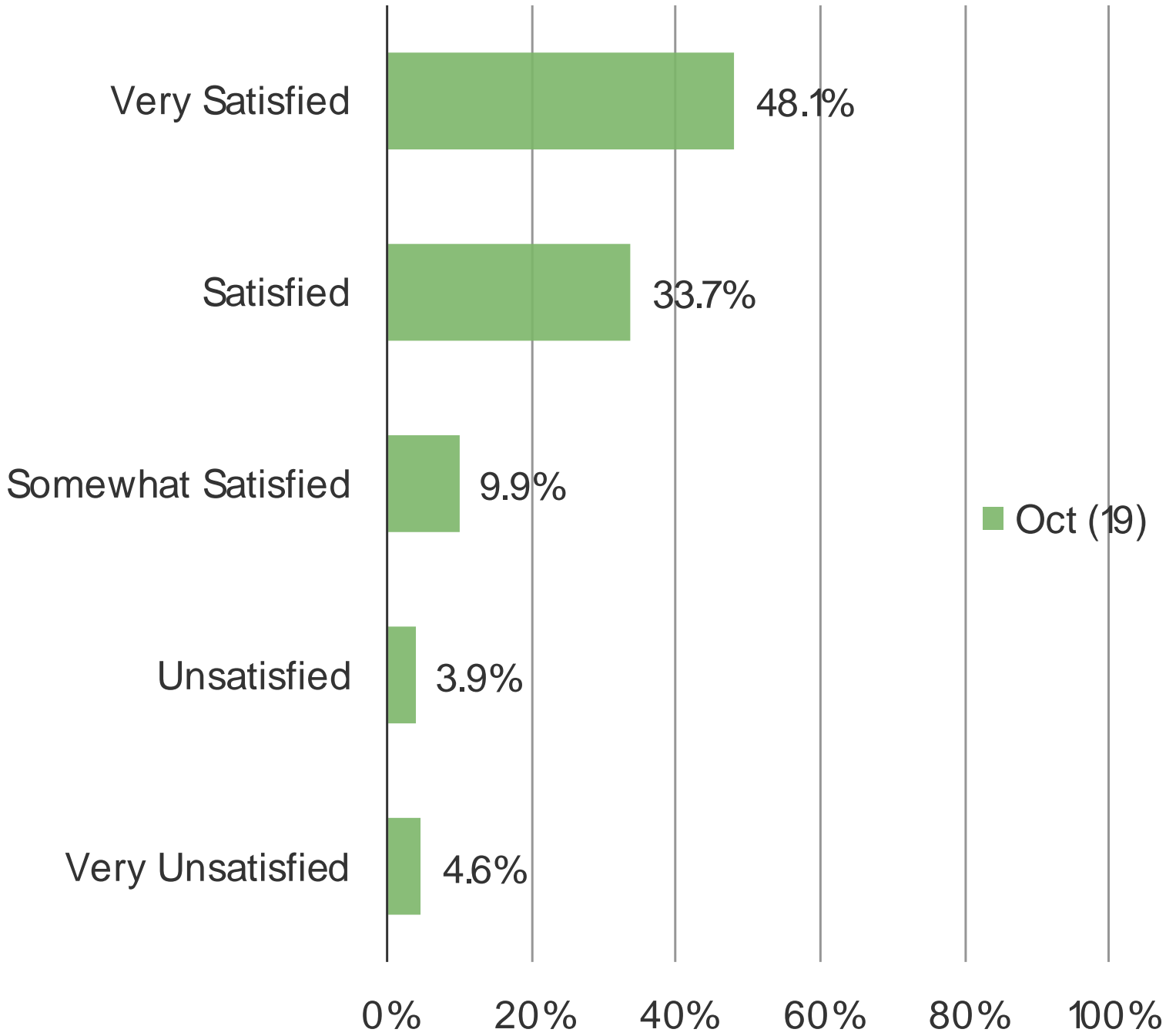
Posed to Netflix subscribers



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HOW SATISFIED ARE YOU WITH YOUR NETFLIX SUBSCRIPTION?

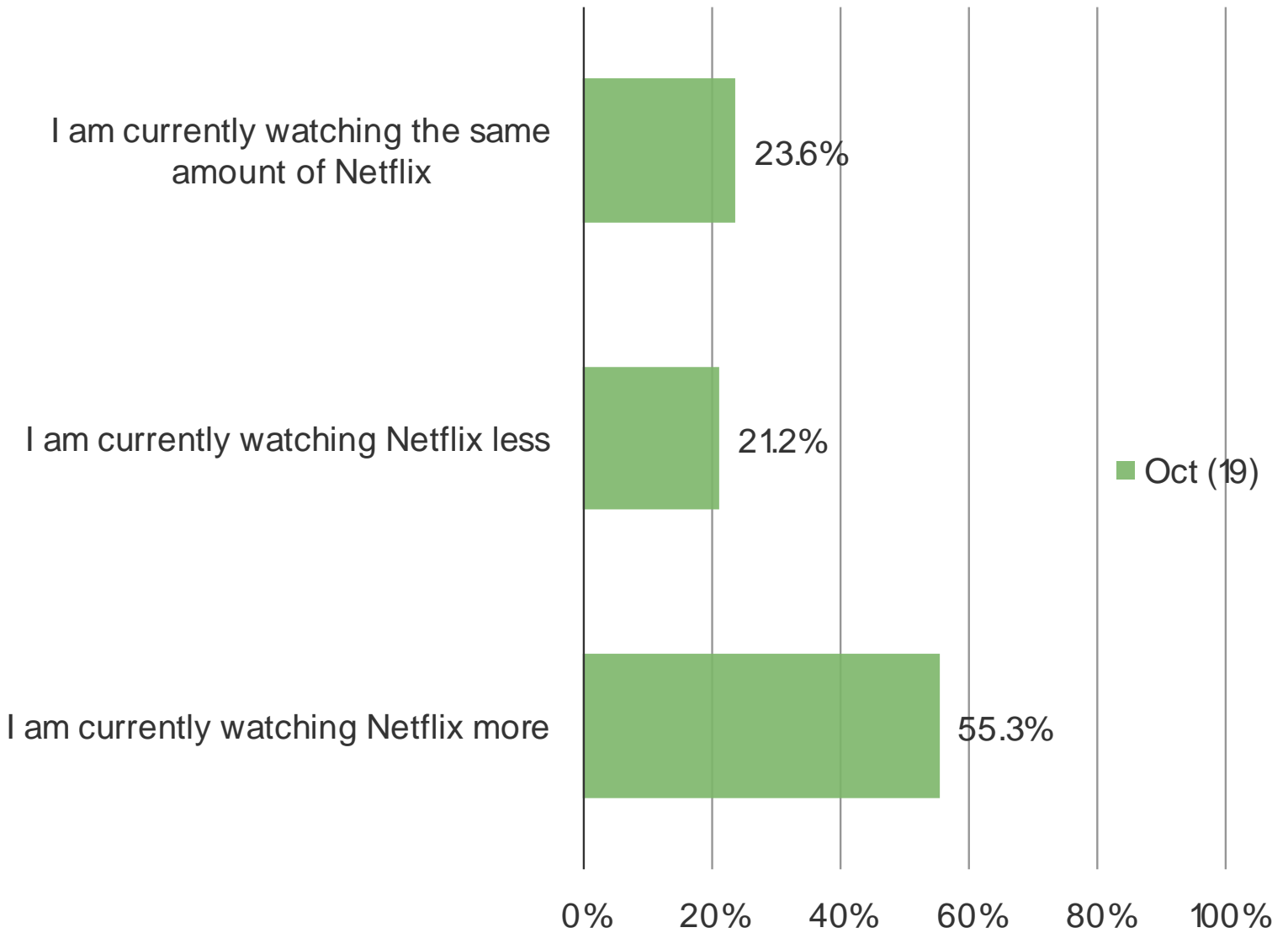
Posed to Netflix subscribers



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

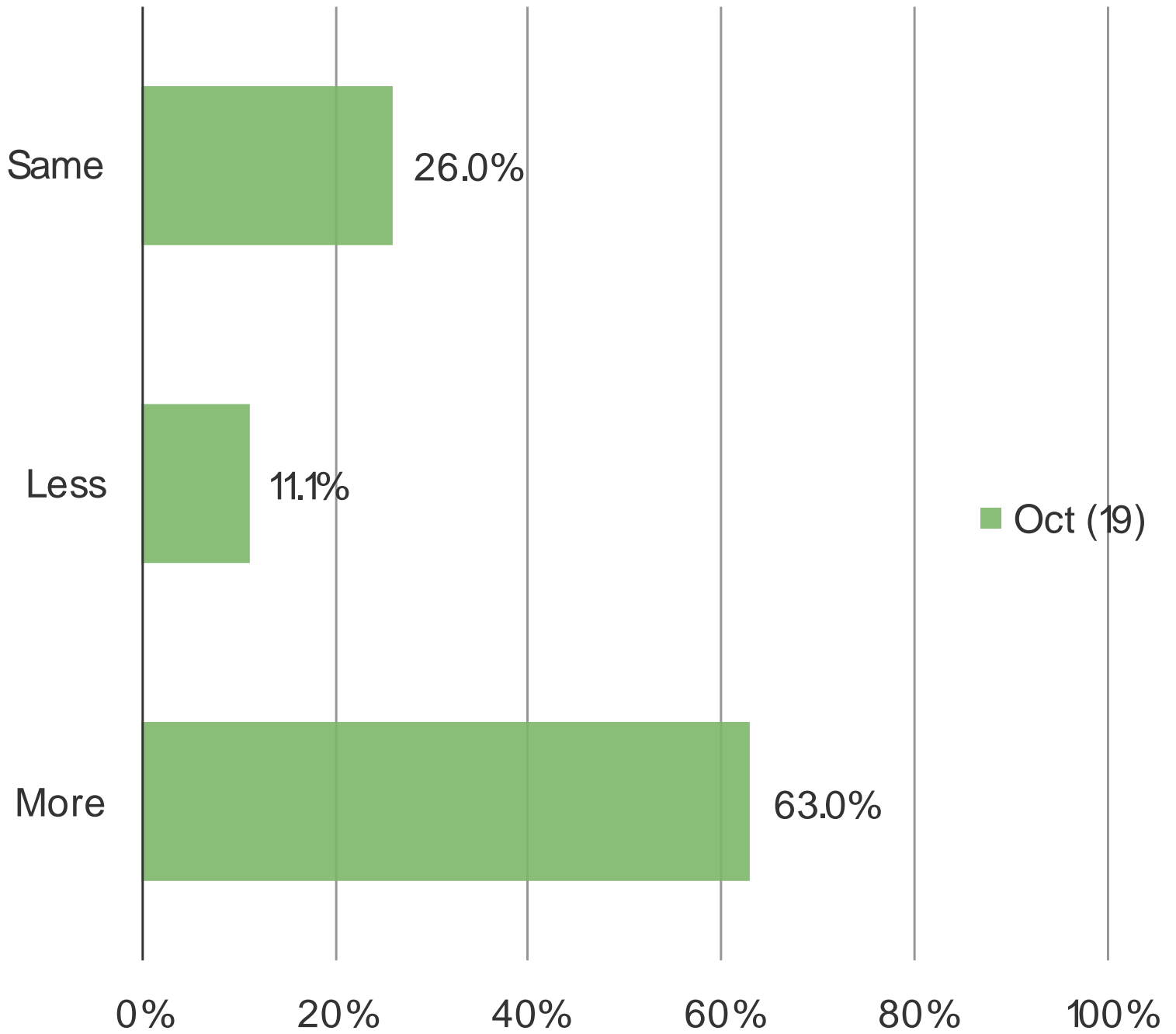
Posed to Netflix subscribers



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

Posed to Netflix subscribers



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WHAT IS YOUR FAVORITE THING TO WATCH ON NETFLIX CURRENTLY?

Posed to Netflix subscribers



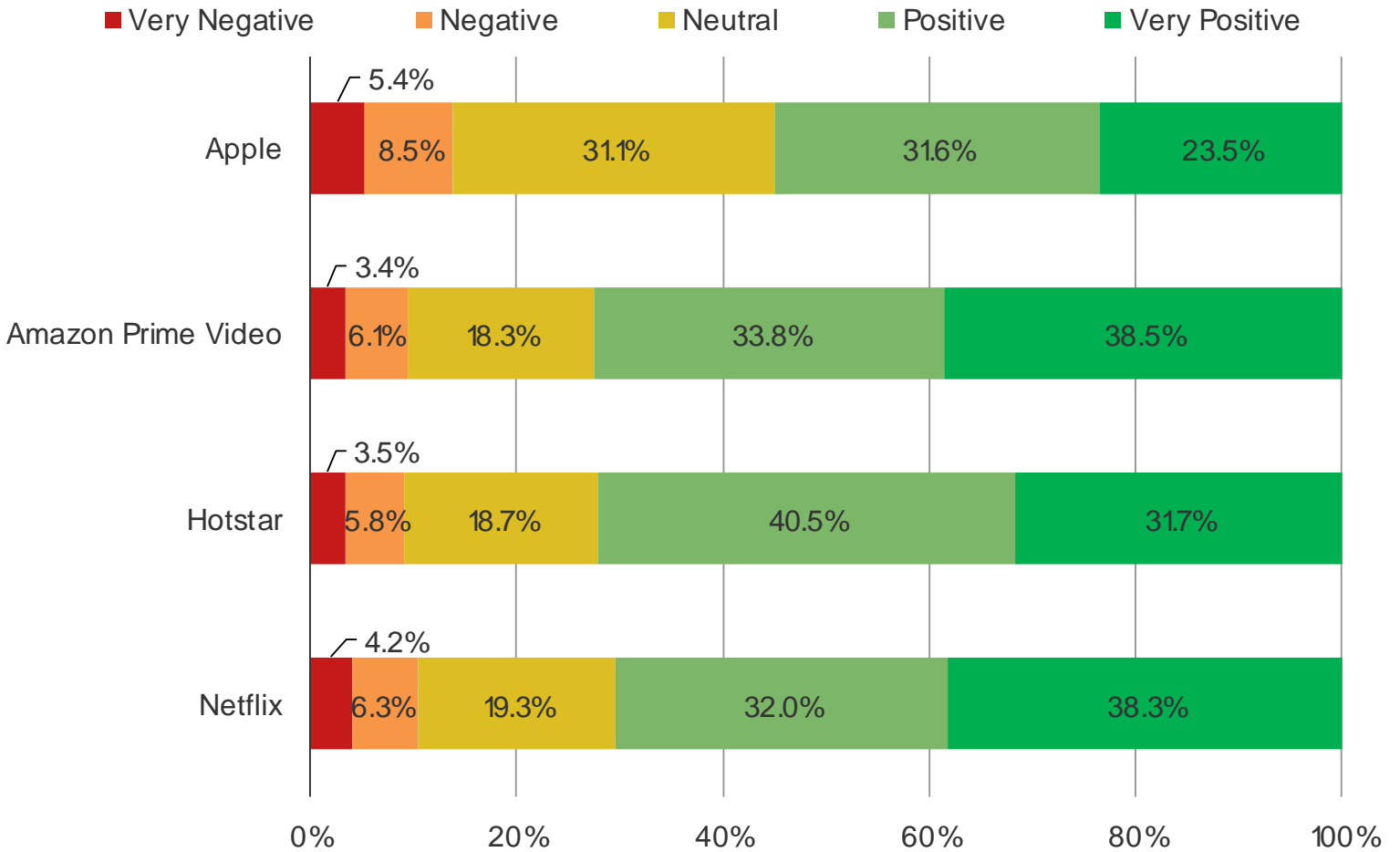
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SENTIMENT AND POPULARITY

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WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS OVERALL?

Posed to all respondents

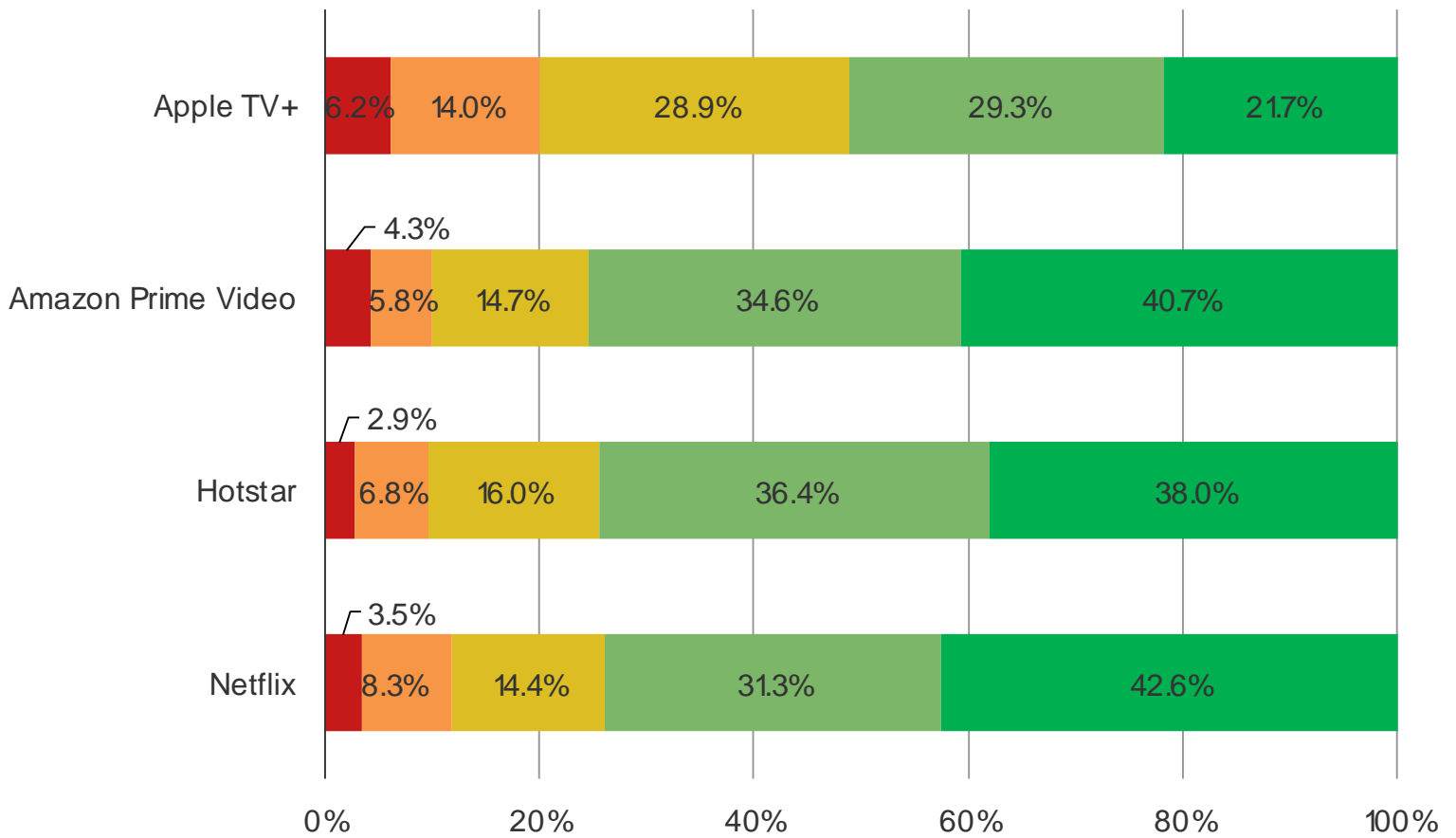


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ARE THE FOLLOWING GETTING MORE OR LESS POPULAR IN INDIA?

Posed to all respondents

■ Much Less Popular ■ Less Popular ■ No Change ■ More Popular ■ Much More Popular

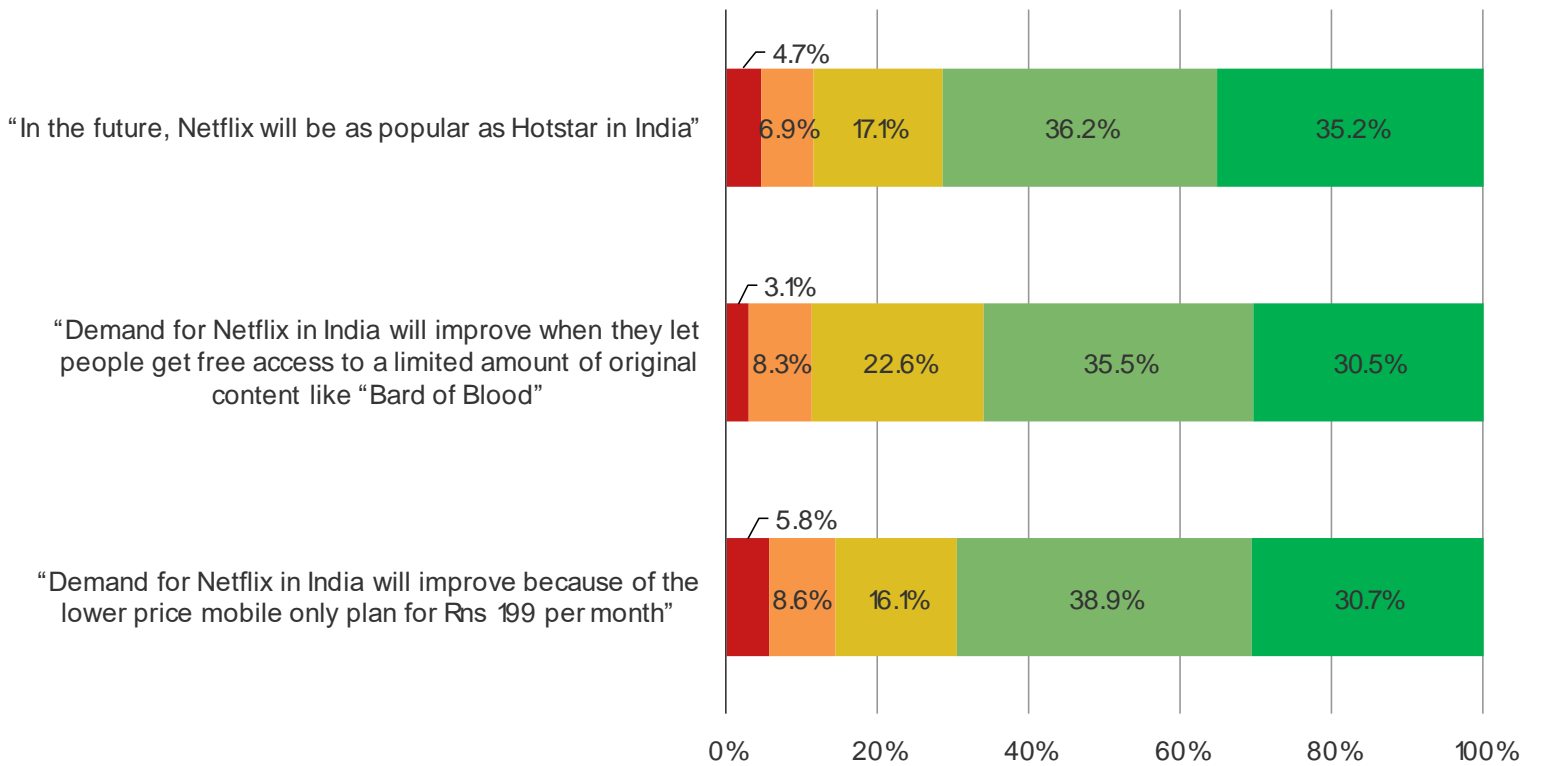


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TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENT:

Posed to all respondents

■ Strongly Disagree
 ■ Disagree
 ■ Neither Agree nor Disagree
 ■ Agree
 ■ Strongly Agree



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IF YOU HAD TO USE ONE WORD TO DESCRIBE EACH OF THE FOLLOWING, WHAT WOULD IT BE?

Posed to all respondents

NETFLIX



HOTSTAR



AMAZON PRIME



APPLE TV+



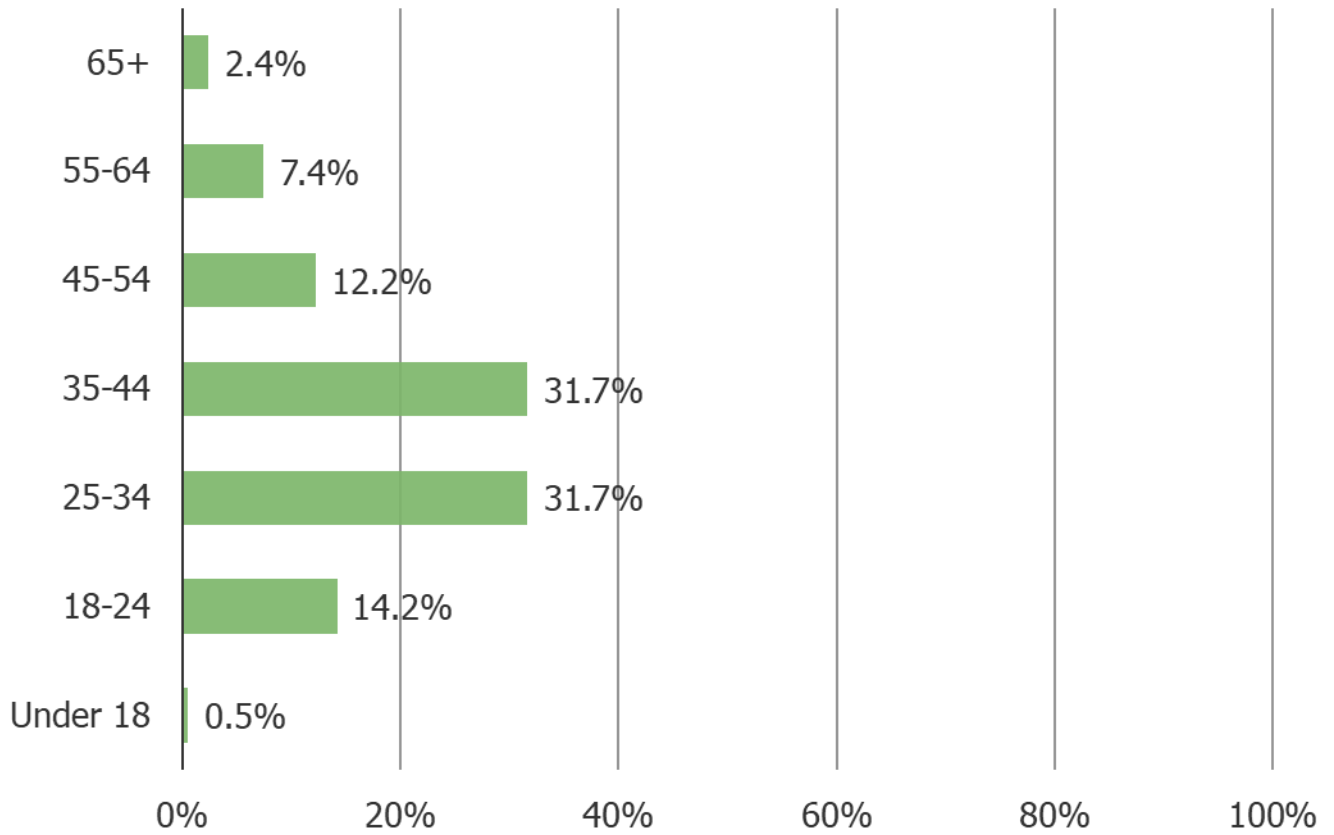
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DEMOGRAPHICS

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AGE

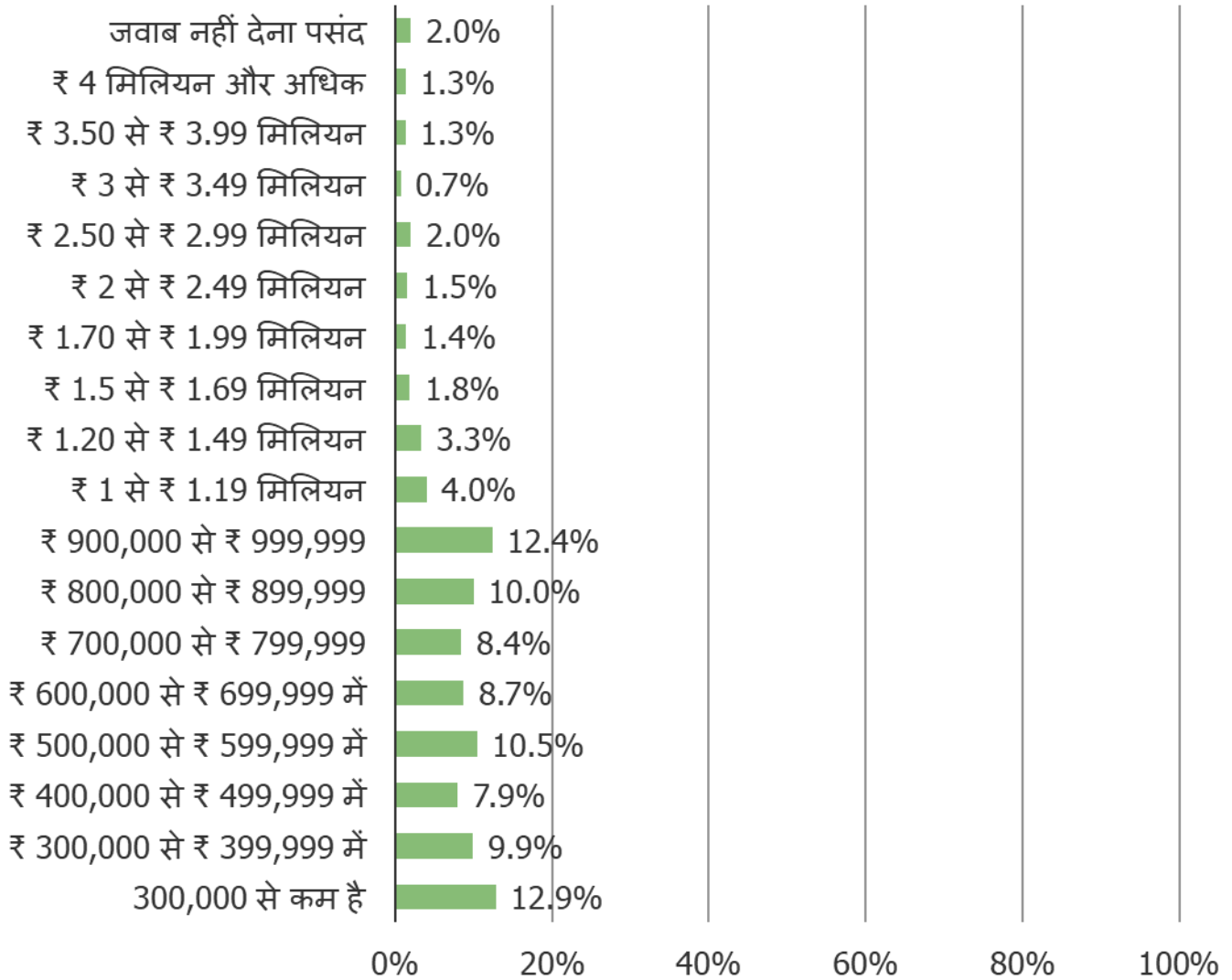
Posed to all respondents



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INCOME

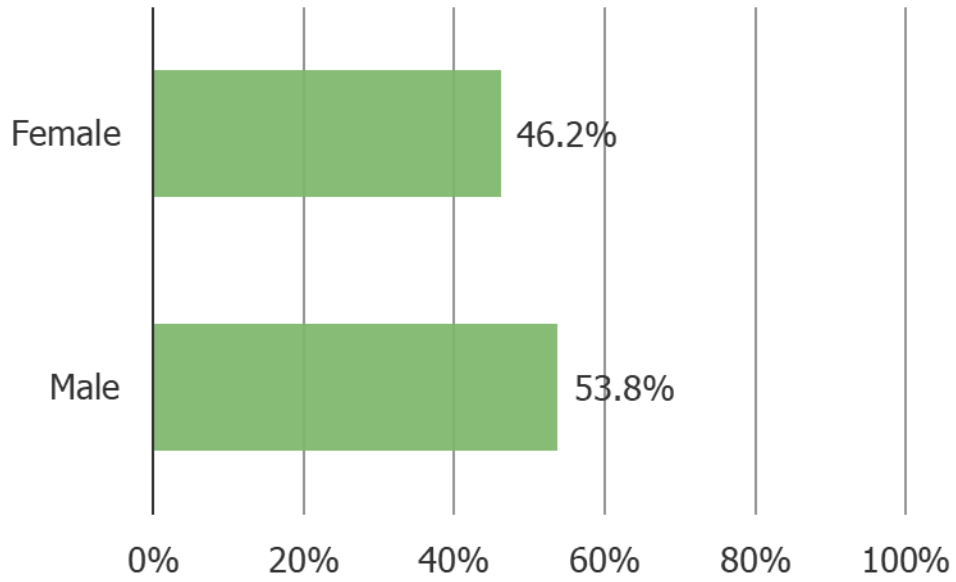
Posed to all respondents



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GENDER

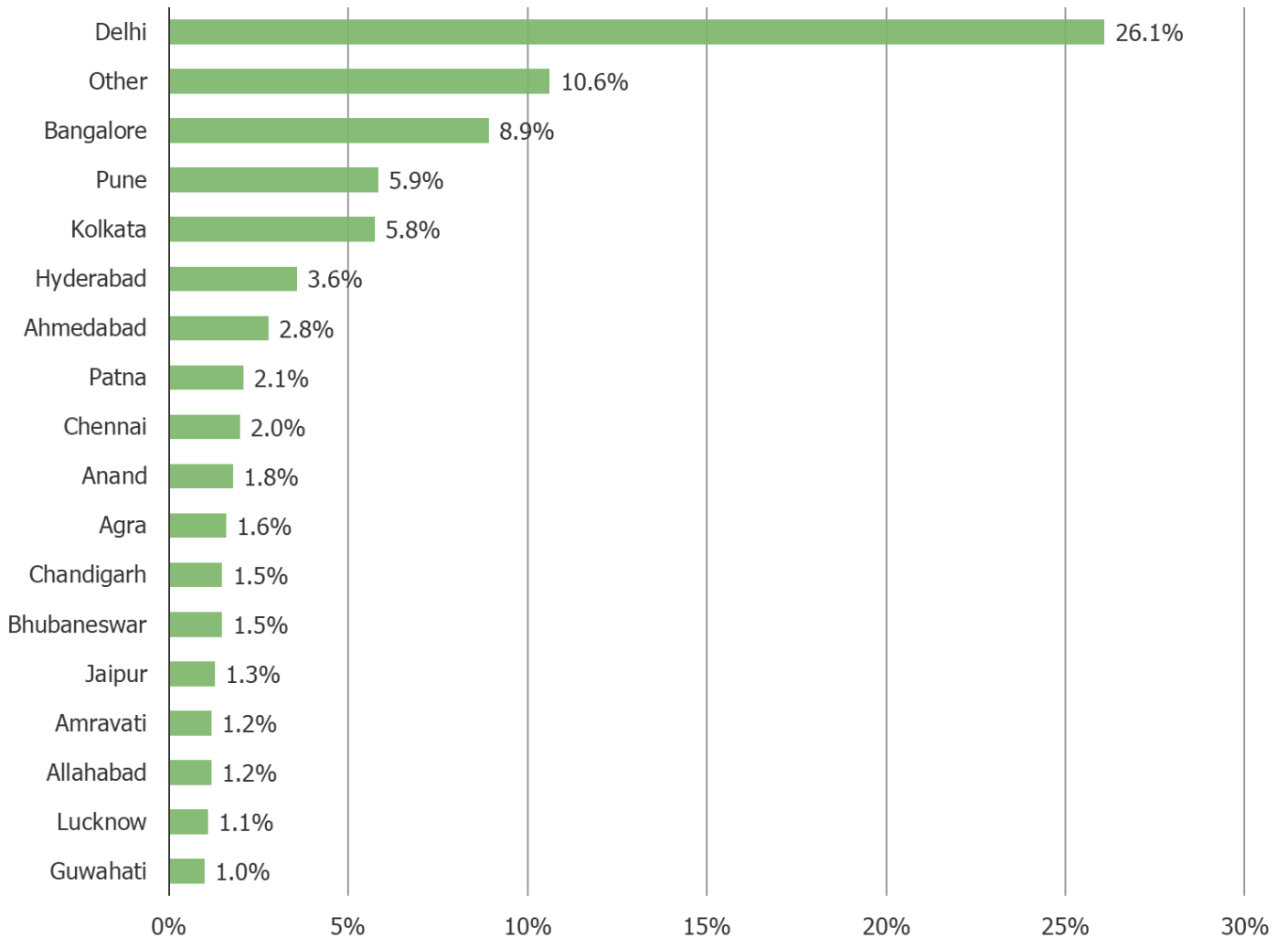
Posed to all respondents



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LOCATION

Posed to all respondents



Readings over 1% shown in chart above.