



CHECK BREAKDOWN:

TREND CHECKS

STREAMING VIDEO SECTOR TRENDS

Streaming remains the most popular method for consuming television and movie content among our respondents in India. Netflix is the first platform that comes to mind when they think of streaming video services (more front of mind now compared to historical volumes).

COMPETITIVE DYNAMICS

The percentage of respondents who self-report being Netflix subscribers and subscribers of competitive platforms took a slight step back q/q, but we'd also flag that the percentage of non-subscribers who said they "definitely will" sign up in the next three months increased q/q (an increasing percentage of the likely future subscribers are saying they would select plans above the mobile only plan).

ENGAGEMENT AND SENTIMENT

Self-reported engagement (hours watched per month) improved q/q and satisfaction remains very positive toward the service.

CHURN EXPECTATIONS

Among active subscribers, the % who are considering cancelling in the next few months declined for the second consecutive quarter.

MACRO FEEDBACK IMPROVES

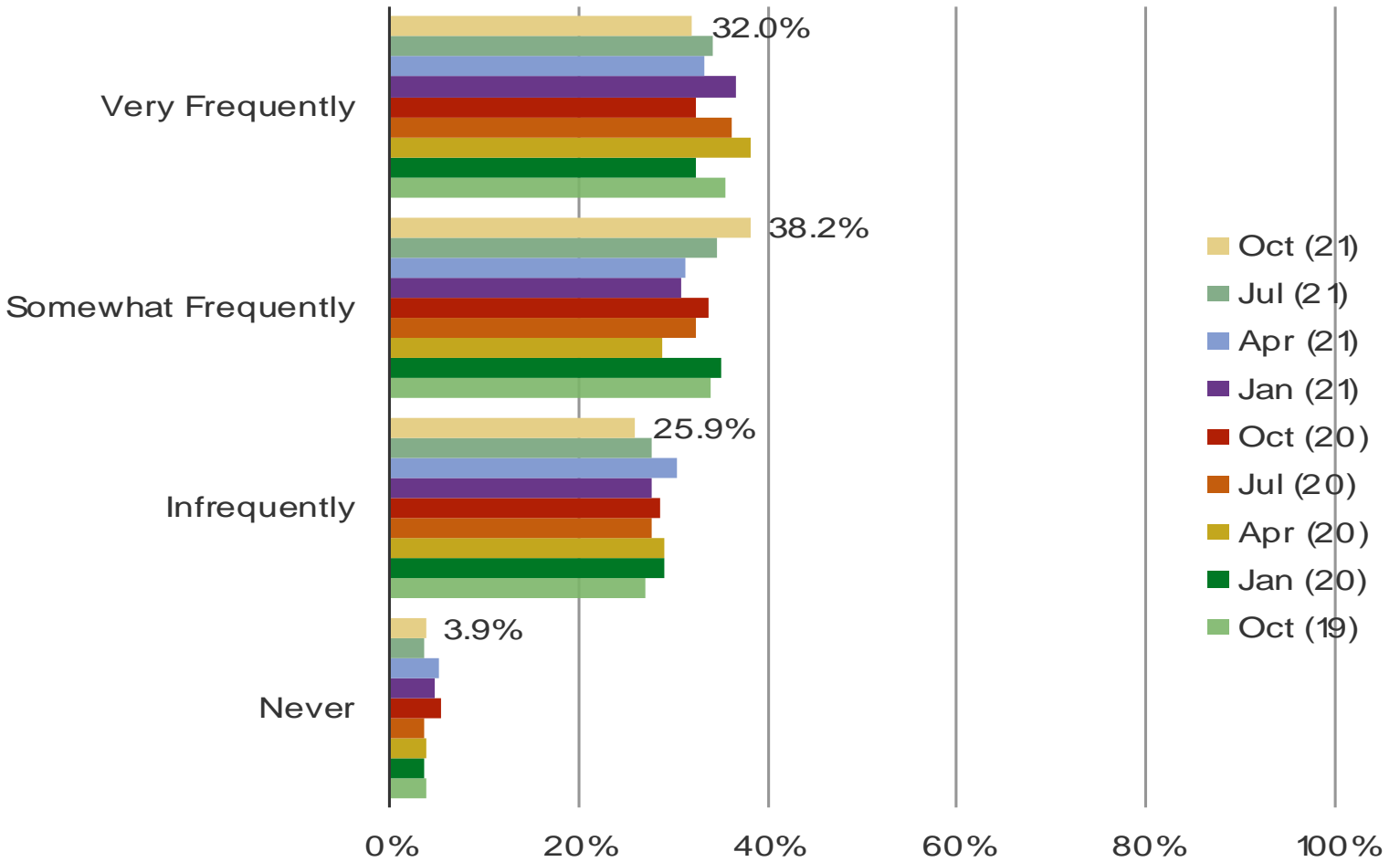
Consumer confidence in the economy and in their personal finances improved considerably q/q.

Netflix India

TV/MOVIE WATCHING

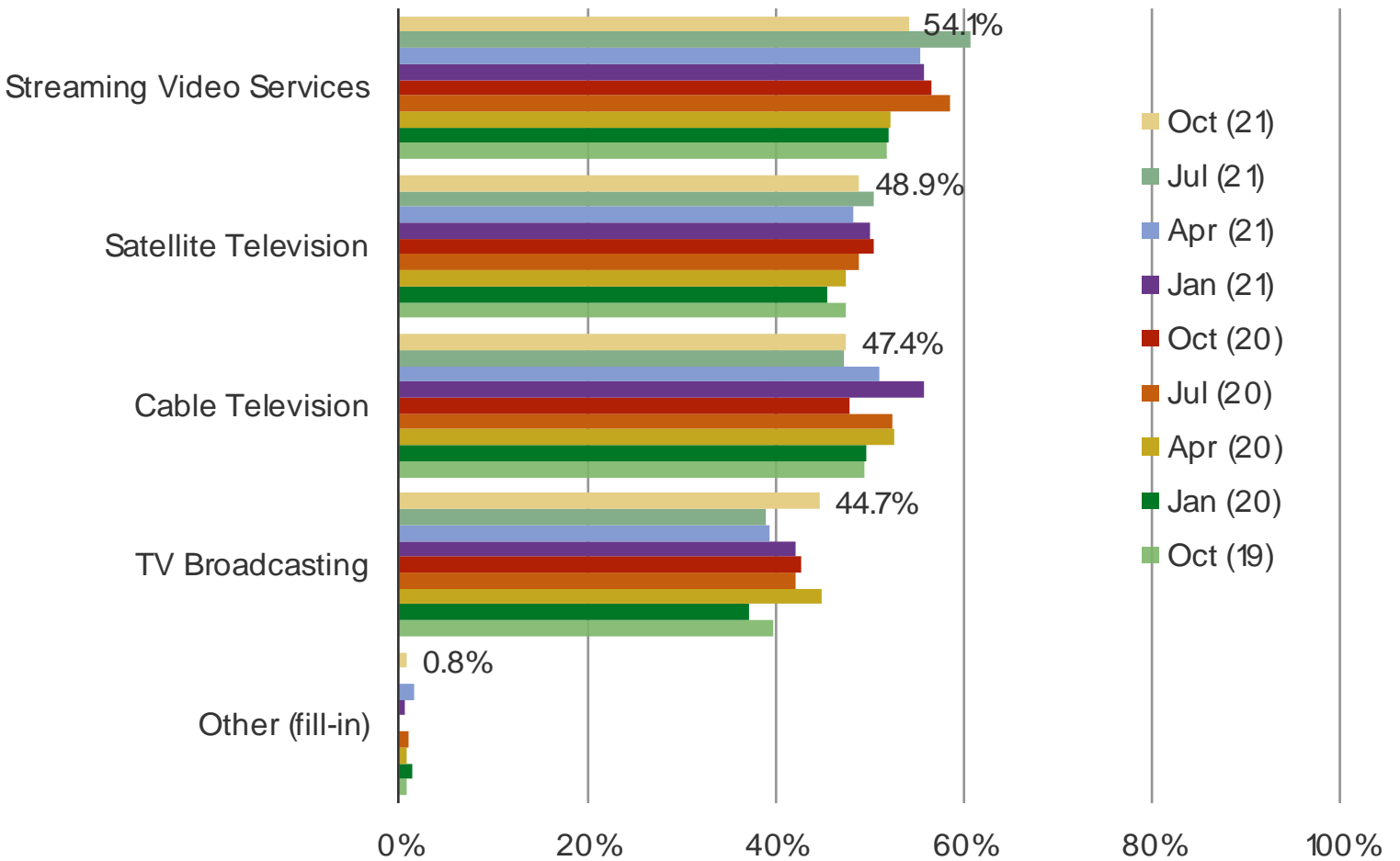
HOW OFTEN DO YOU WATCH TELEVISION OR MOVIES?

Posed to all respondents



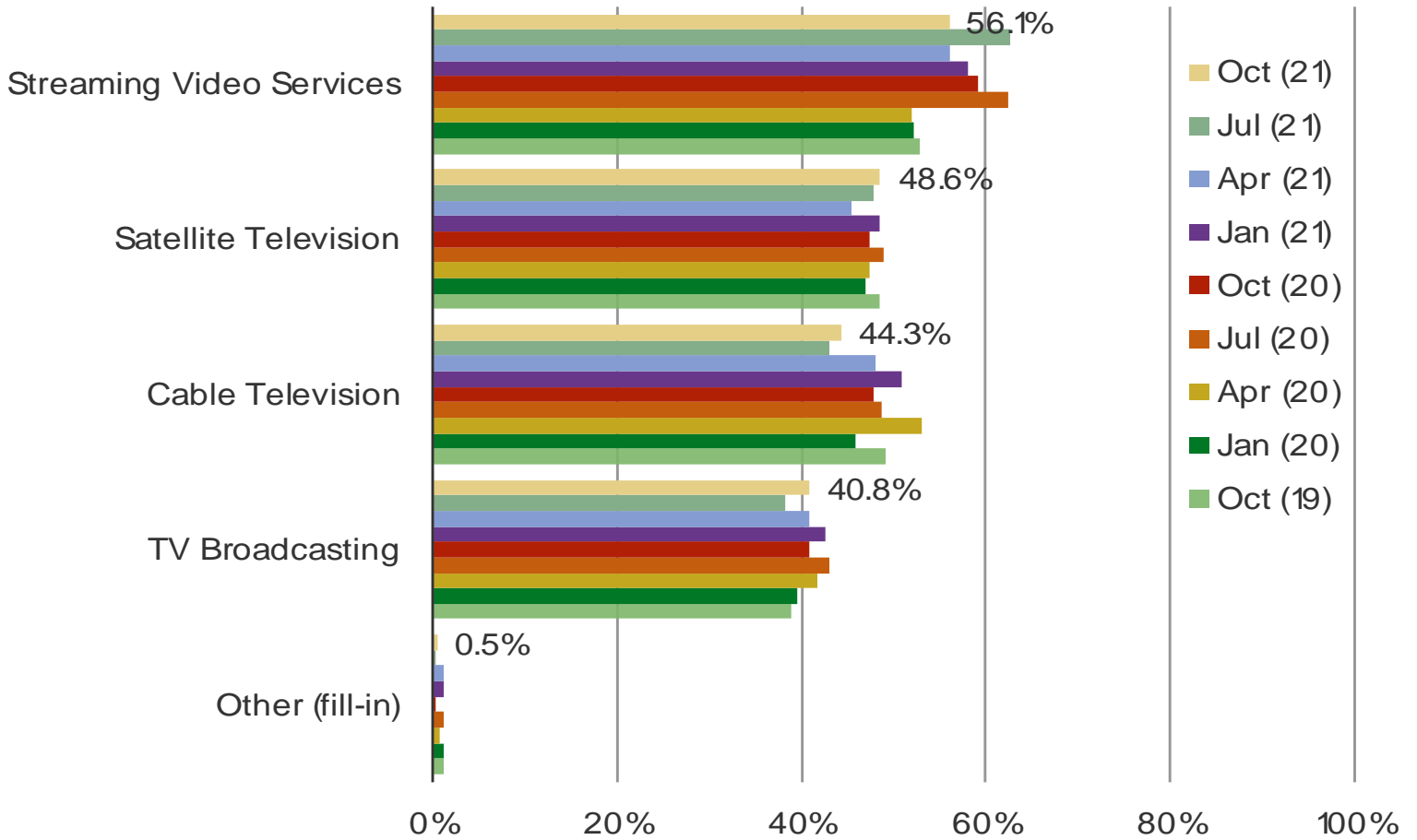
HOW DO YOU USUALLY WATCH TELEVISION SHOWS? (SELECT ALL THAT APPLY)

Posed to respondents who watch TV or movies



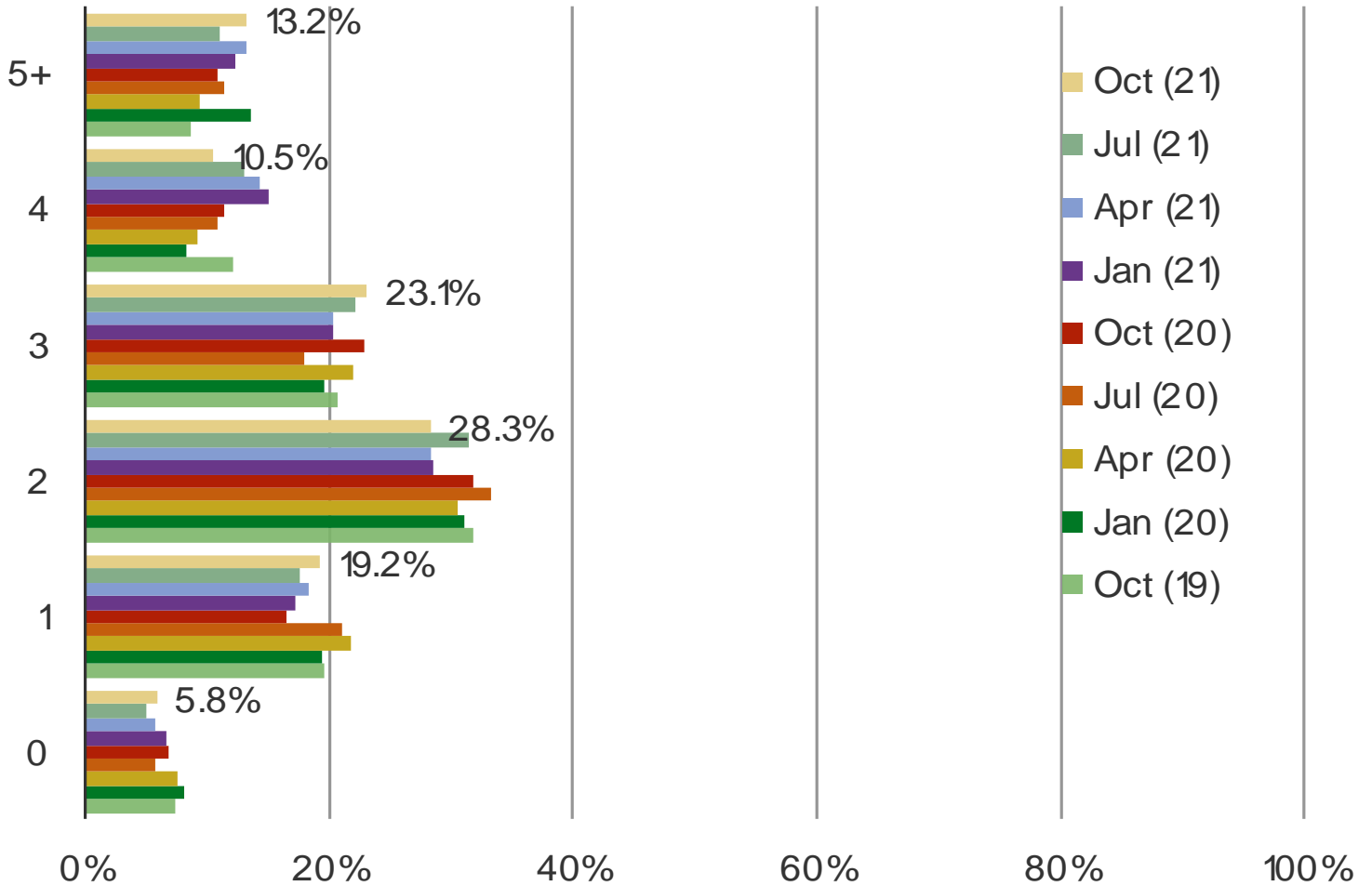
HOW DO YOU USUALLY WATCH MOVIES? (SELECT ALL THAT APPLY)

Posed to respondents who watch TV or movies



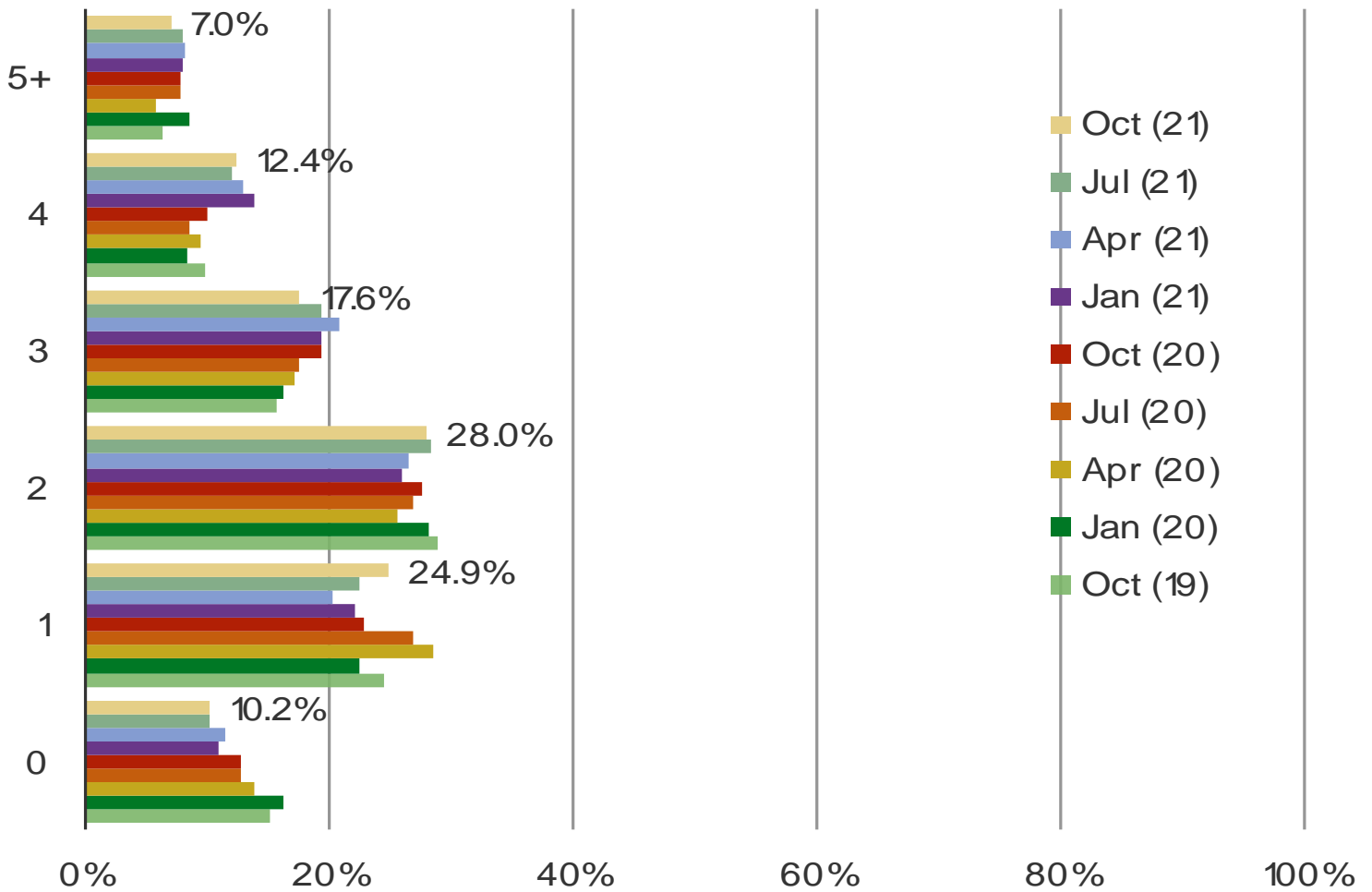
HOW MANY STREAMING VIDEO SERVICES DO YOU CURRENTLY USE?

Posed to all respondents



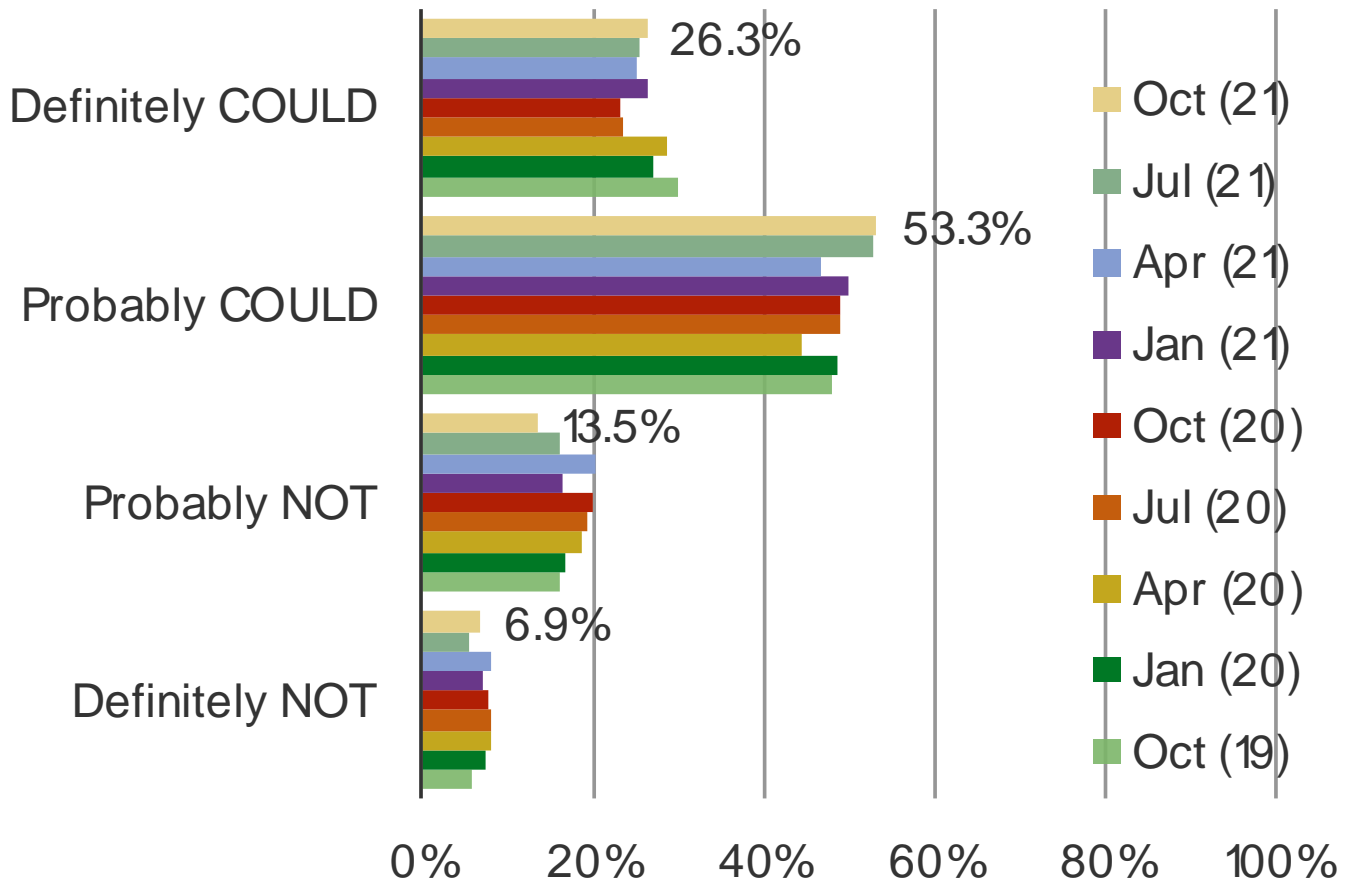
HOW MANY STREAMING VIDEO SERVICES DO YOU CURRENTLY PAY FOR?

Posed to all respondents



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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Audience: 800 Consumers in India

Date: October 2021

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

Posed to all respondents

October 2021



July 2021



April 2021



January 2021

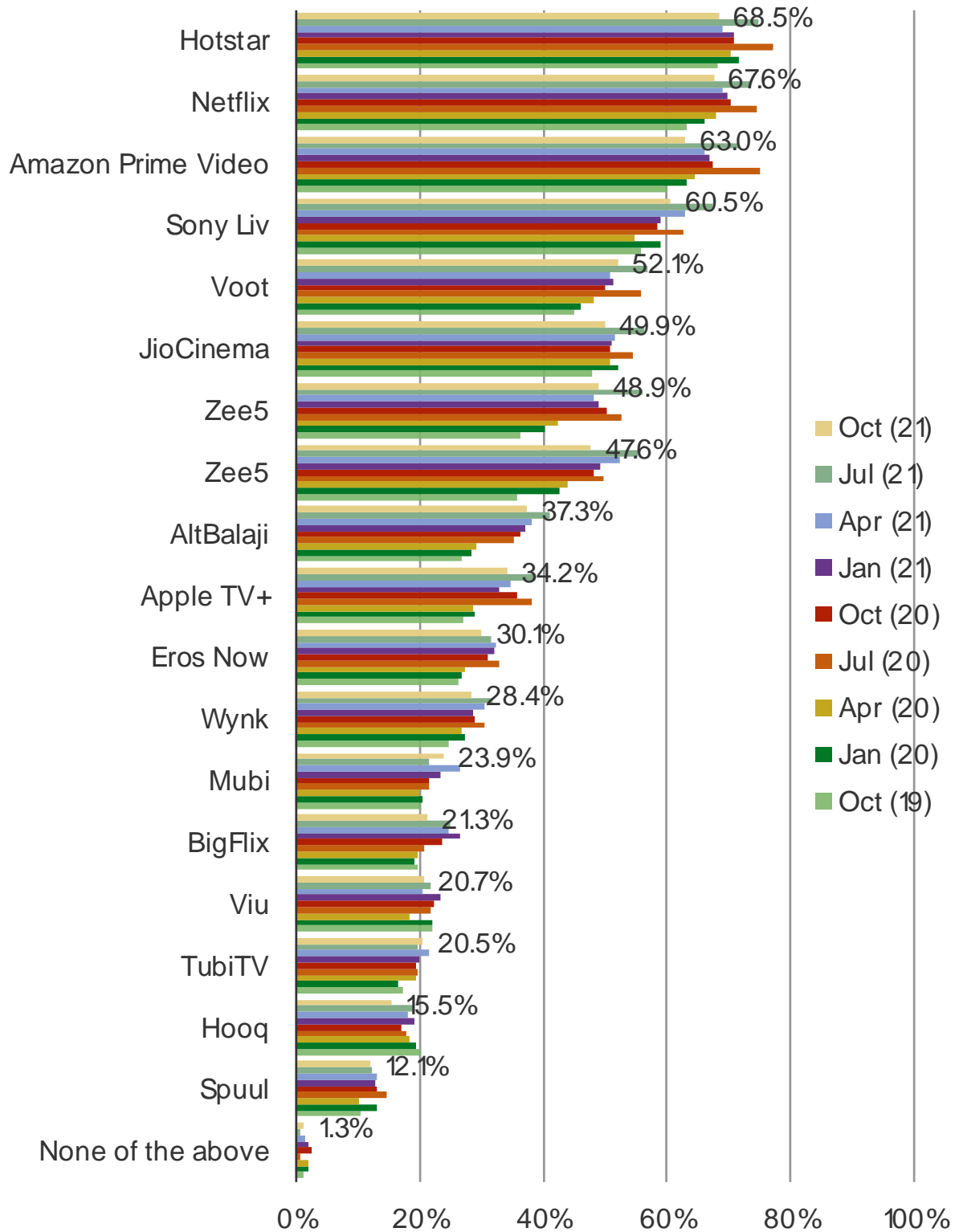


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STREAMING VIDEO AWARENESS AND ACCOUNT HOLDERS

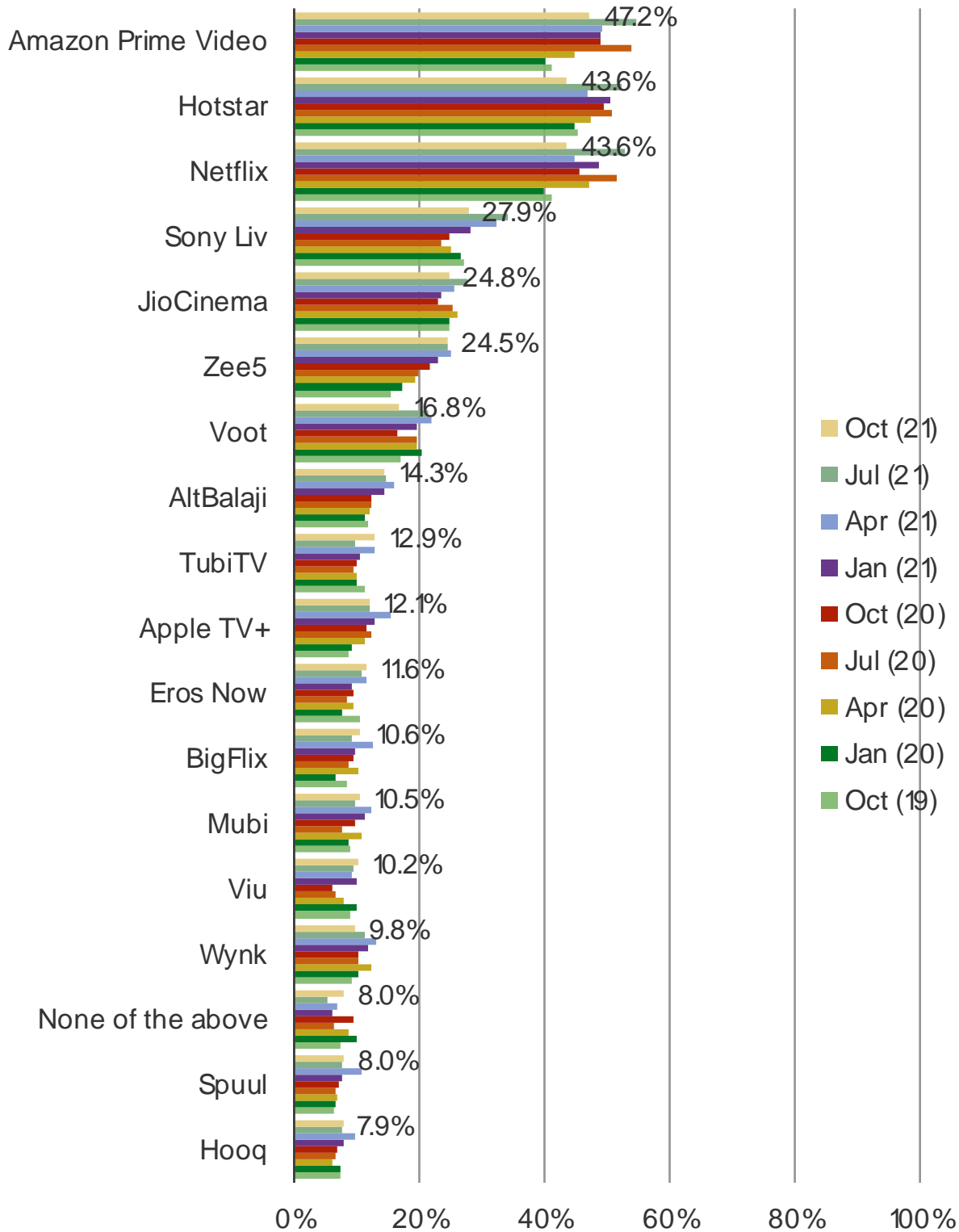
WHICH OF THE FOLLOWING STREAMING VIDEO SERVICES HAVE YOU HEARD OF?

Posed to all respondents



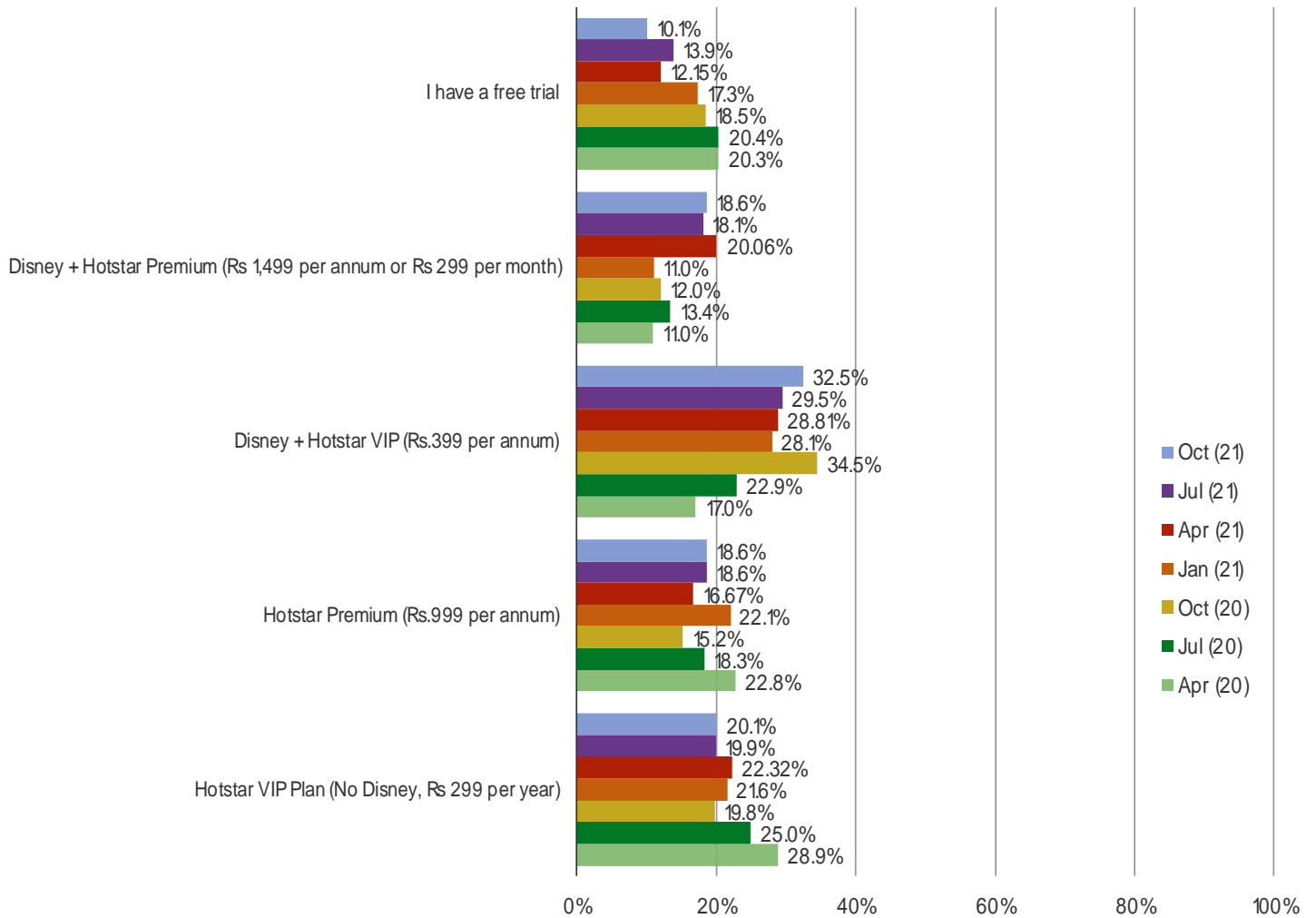
DO YOU CURRENTLY HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents



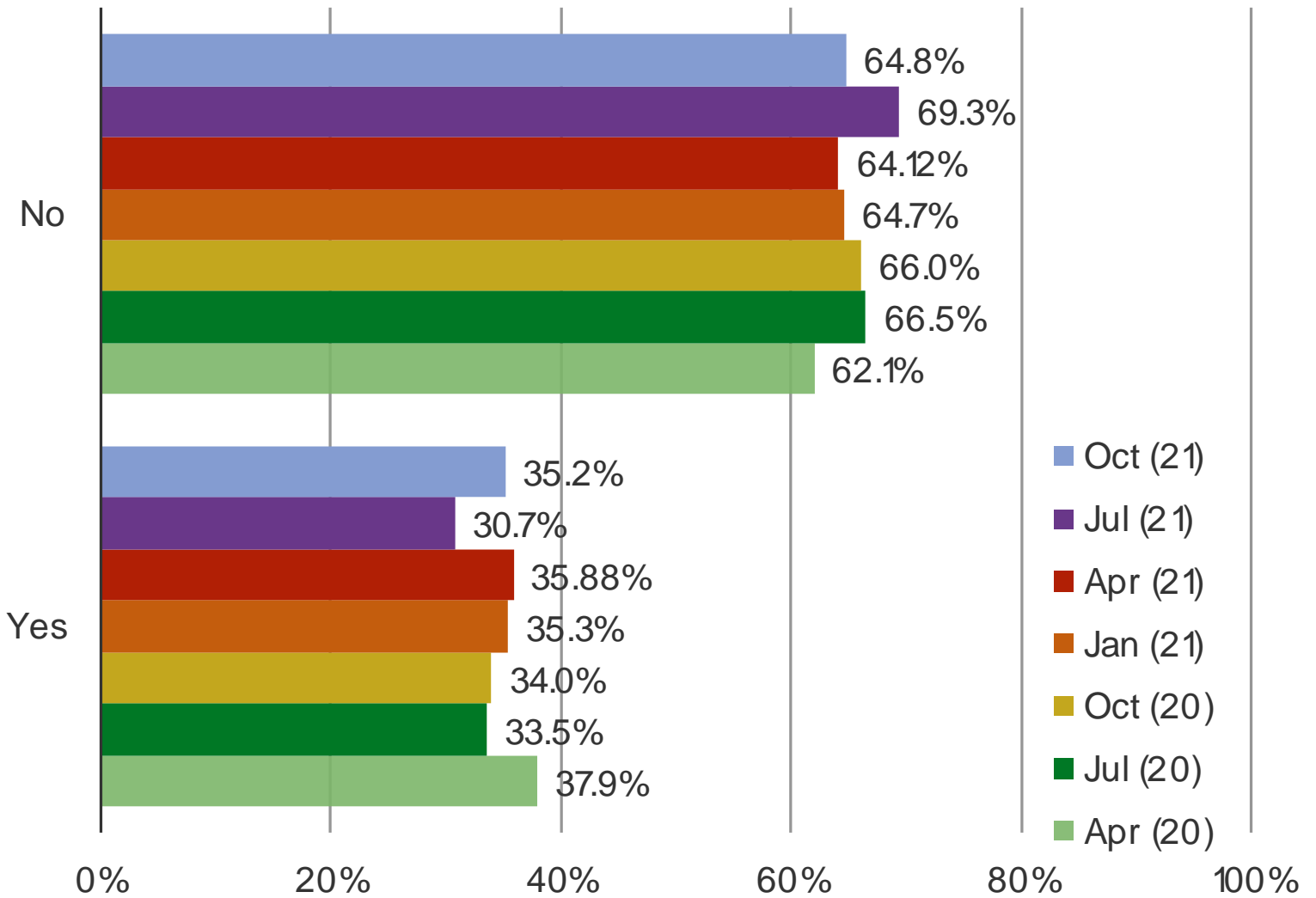
WHICH OF THE FOLLOWING HOTSTAR PLANS DO YOU CURRENTLY HAVE?

Posed to Hotstar subscribers



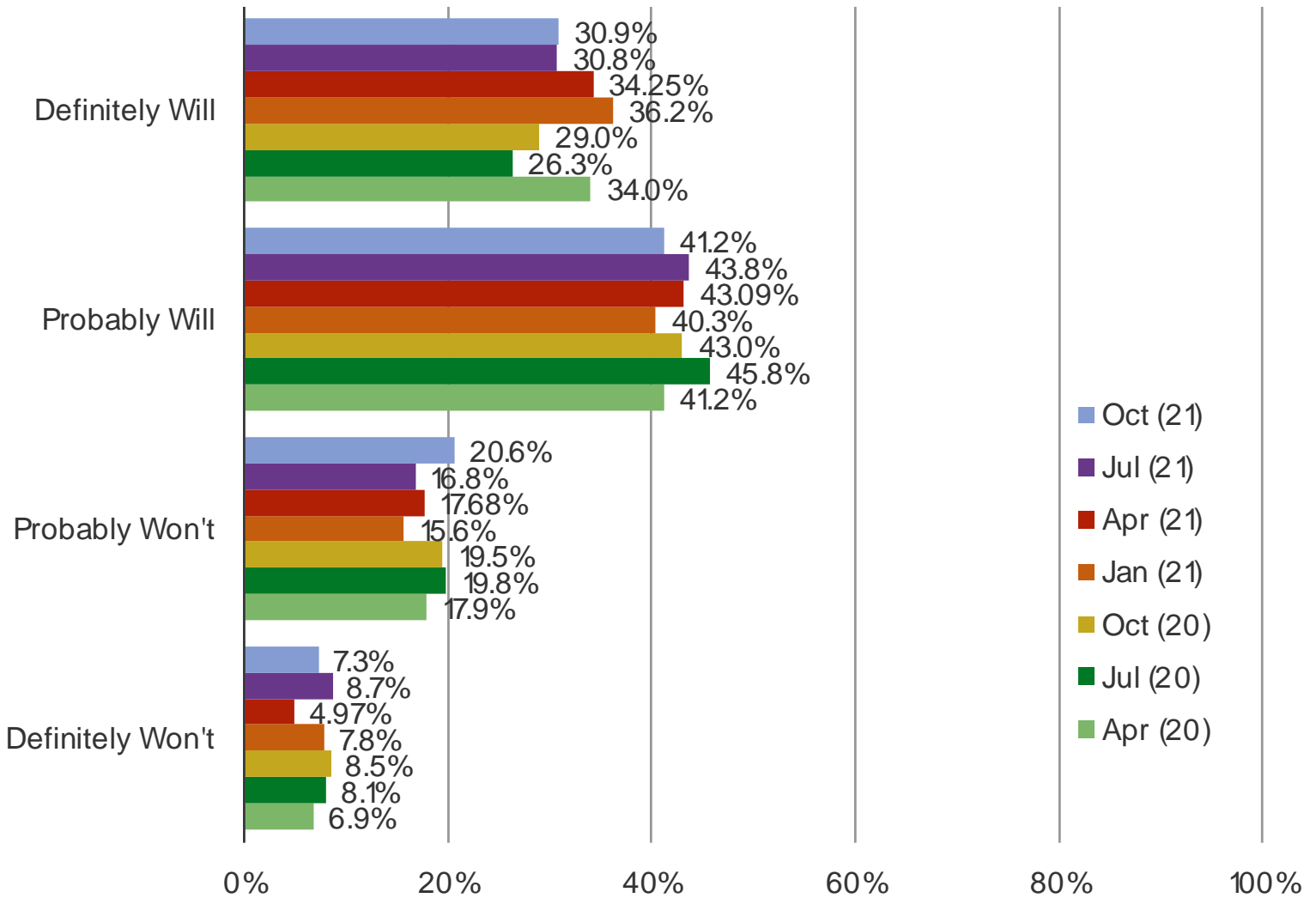
ARE YOU CONSIDERING UNSUBSCRIBING FROM HOTSTAR IN THE NEXT FEW MONTHS?

Posed to Hotstar subscribers



IN THE NEXT THREE MONTHS, HOW LIKELY WILL YOU PAY FOR DISNEY+?

Posed to Hotstar subscribers without Disney+ as part of their plan

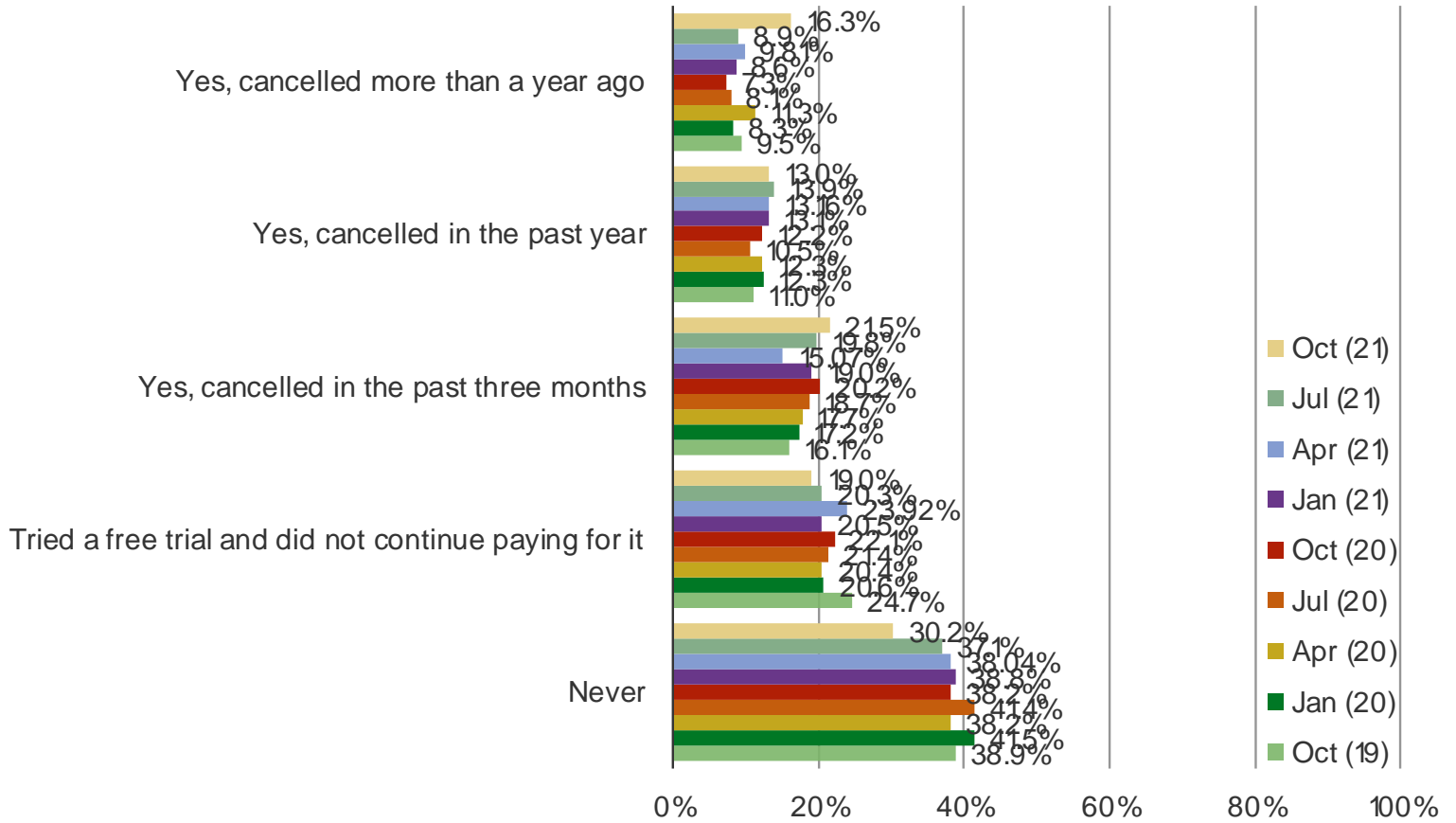


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NON-NETFLIX SUBSCRIBERS

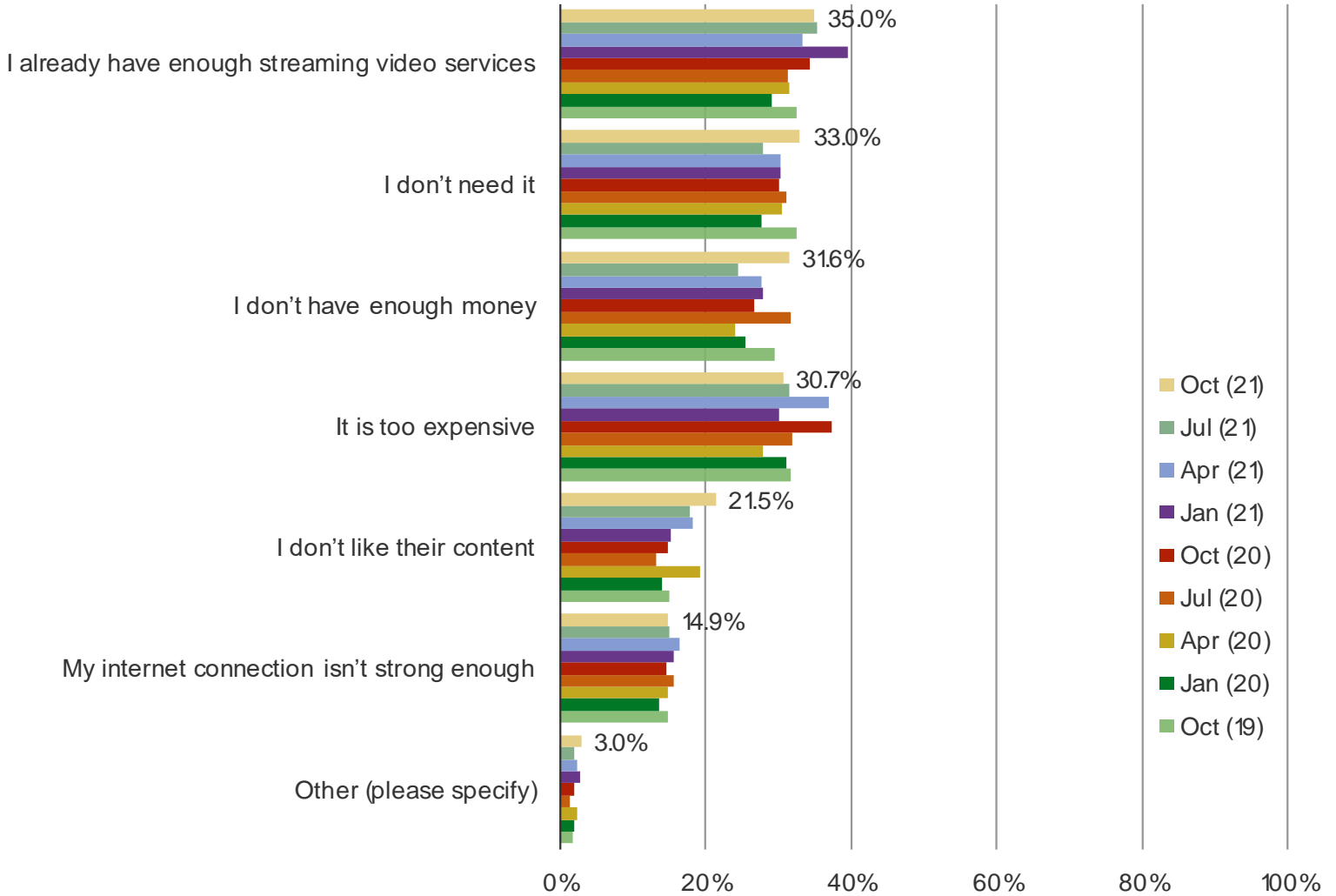
HAVE YOU EVER PAID TO SUBSCRIBE TO NETFLIX IN THE PAST?

Posed to non-Netflix subscribers



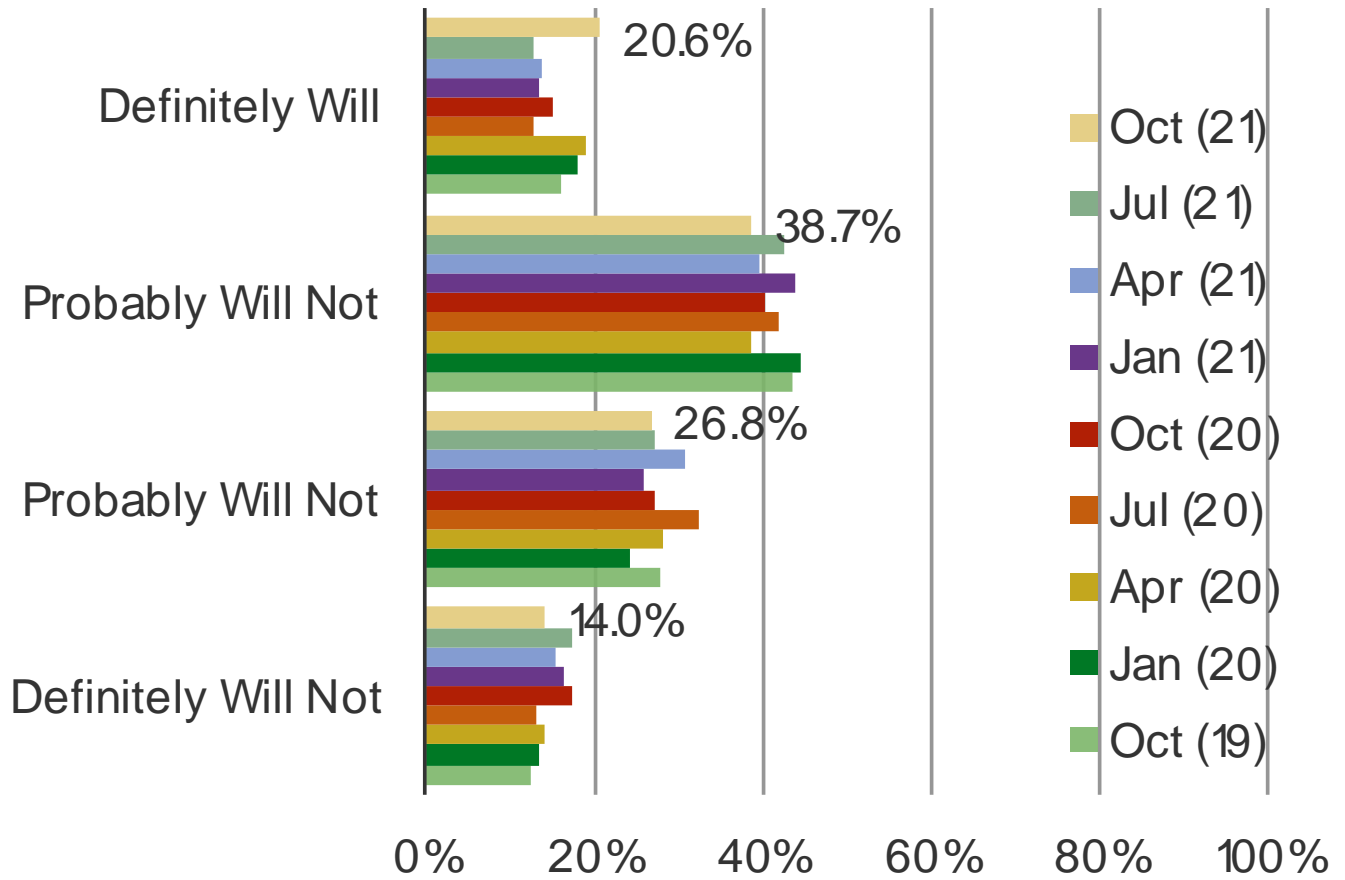
WHY ARE YOU CURRENTLY NOT A NETFLIX SUBSCRIBER? (SELECT ALL THAT APPLY)

Posed to non-Netflix subscribers



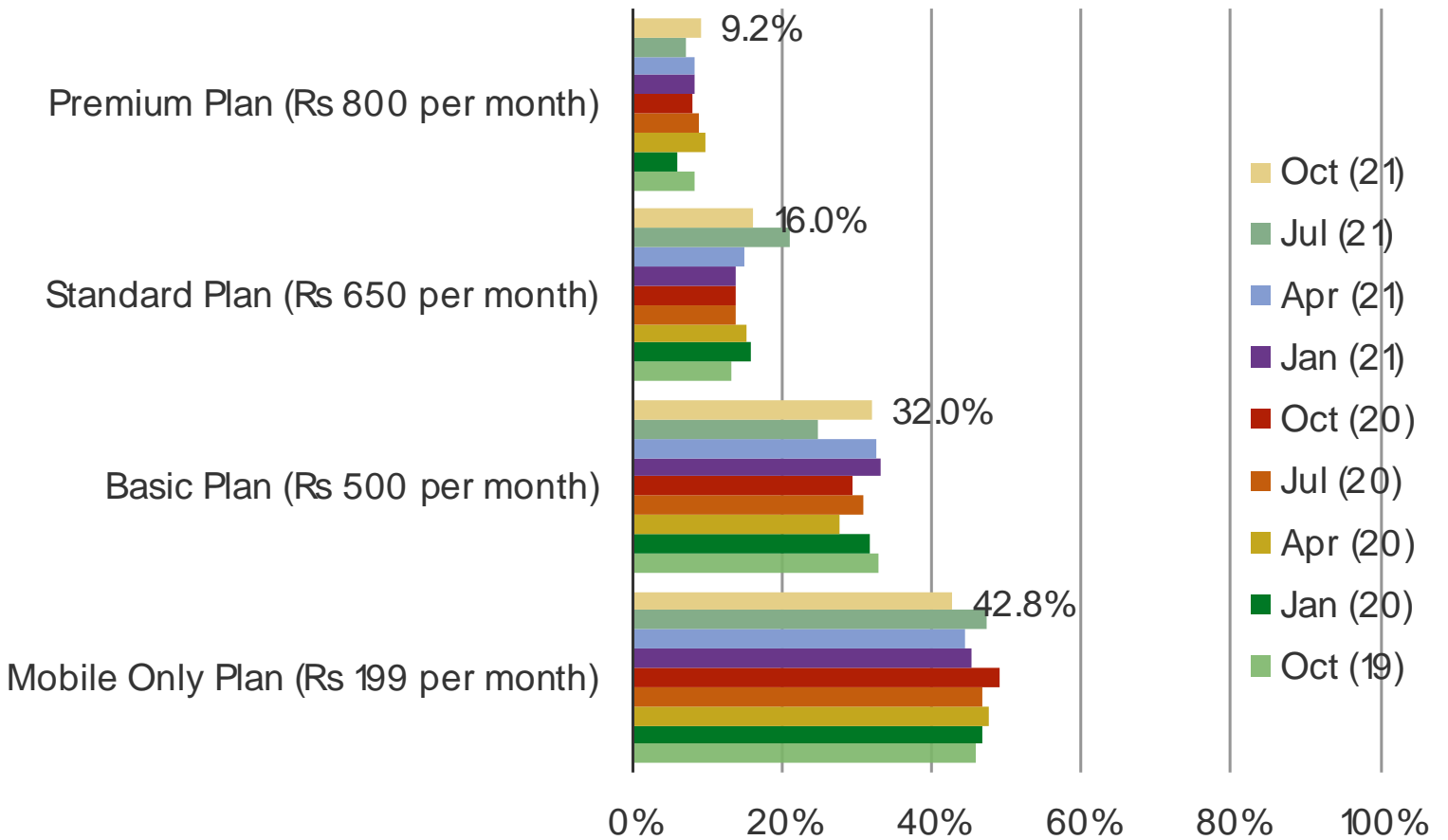
HOW LIKELY ARE YOU TO START AN ACCOUNT WITH NETFLIX IN THE NEXT THREE MONTHS?

Posed to non-Netflix subscribers



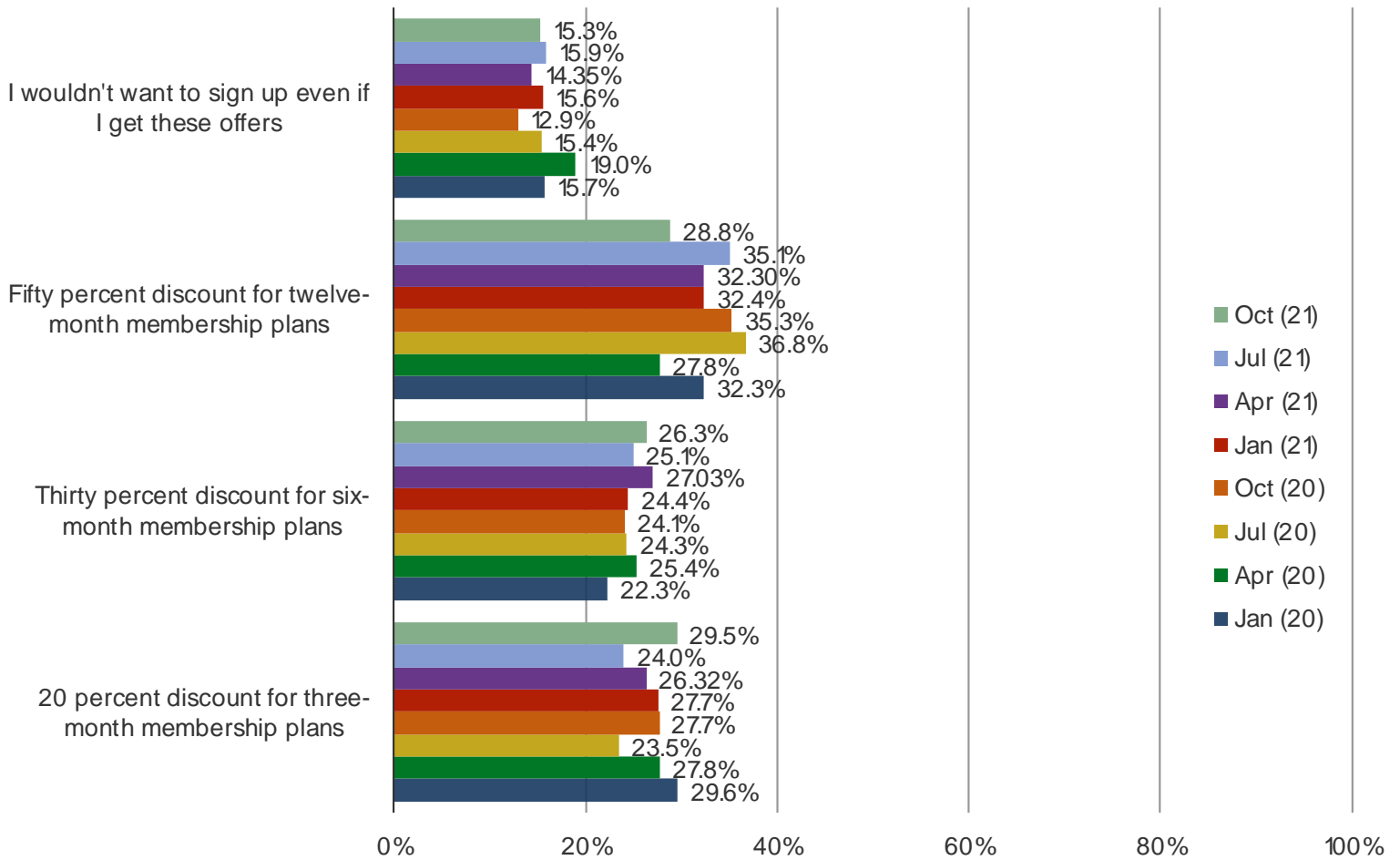
WHICH OF THE FOLLOWING PLANS WOULD YOU BE MOST LIKELY TO SIGN UP FOR?

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



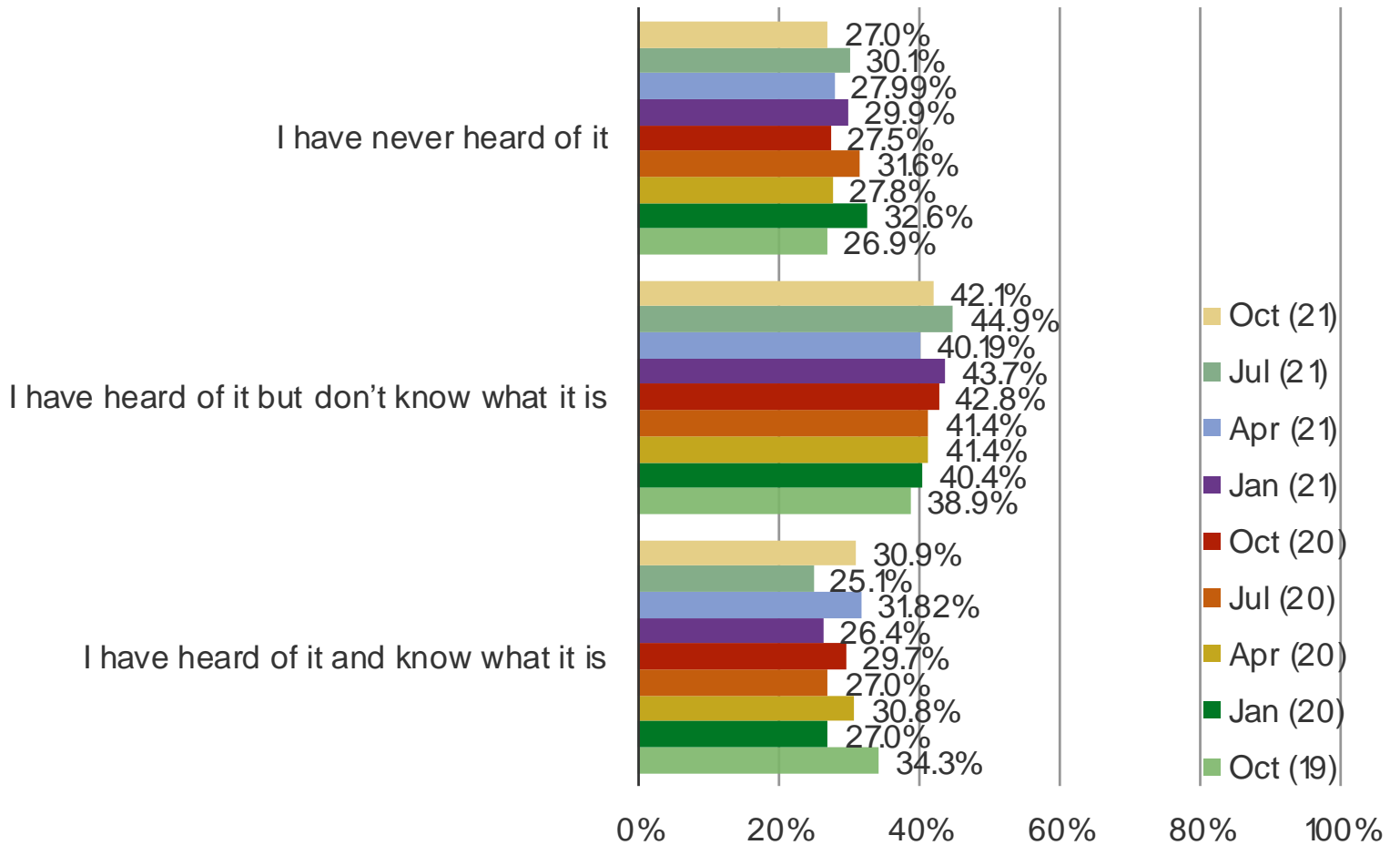
WOULD YOU PREFER TO SIGN UP FOR NETFLIX IF ANY OF THE FOLLOWING WAS OFFERED TO YOU?

Posed to non-Netflix subscribers.



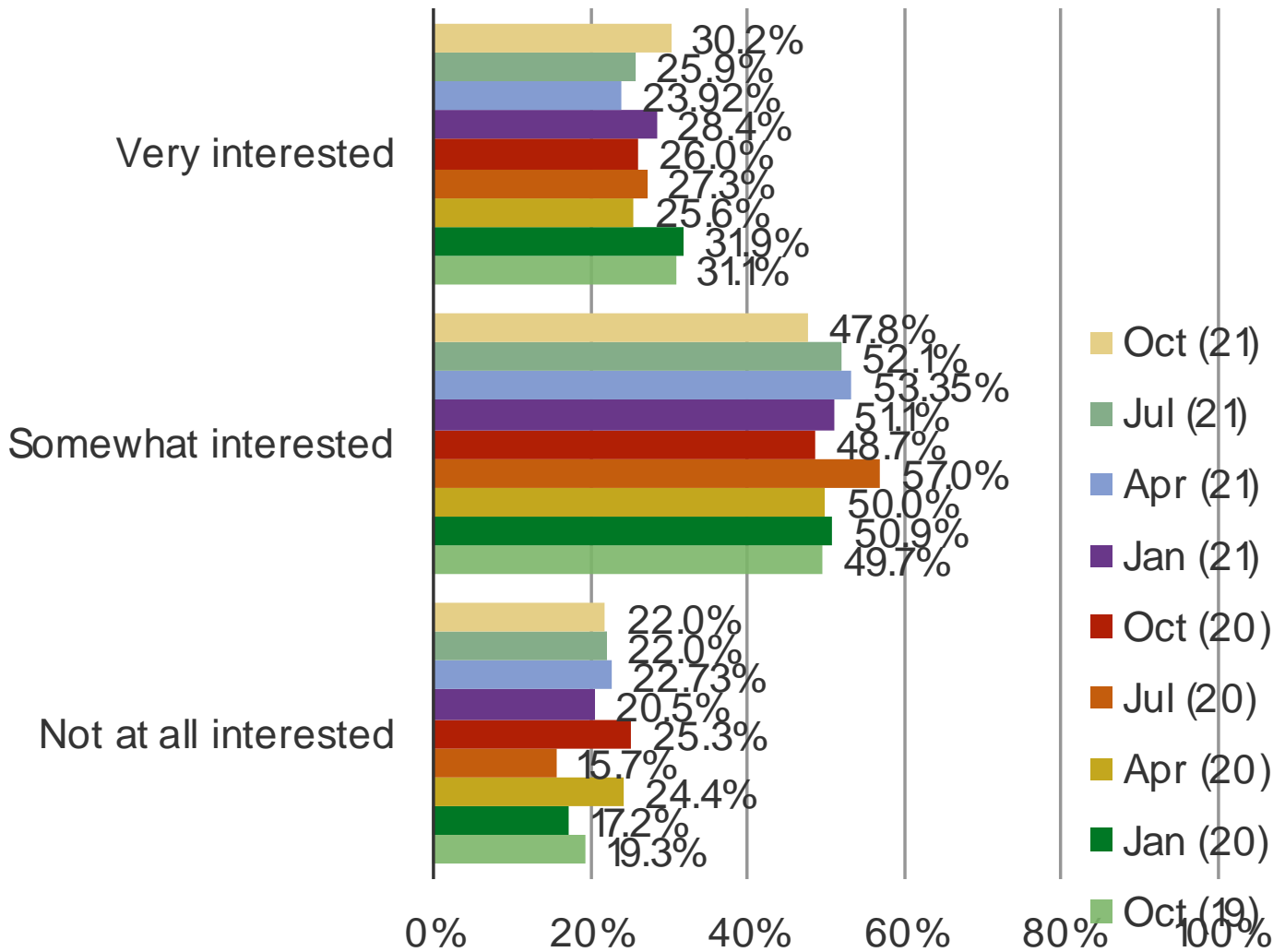
HAVE YOU HEARD OF THE NETFLIX SHOW “BARD OF BLOOD”?

Posed to non-Netflix subscribers



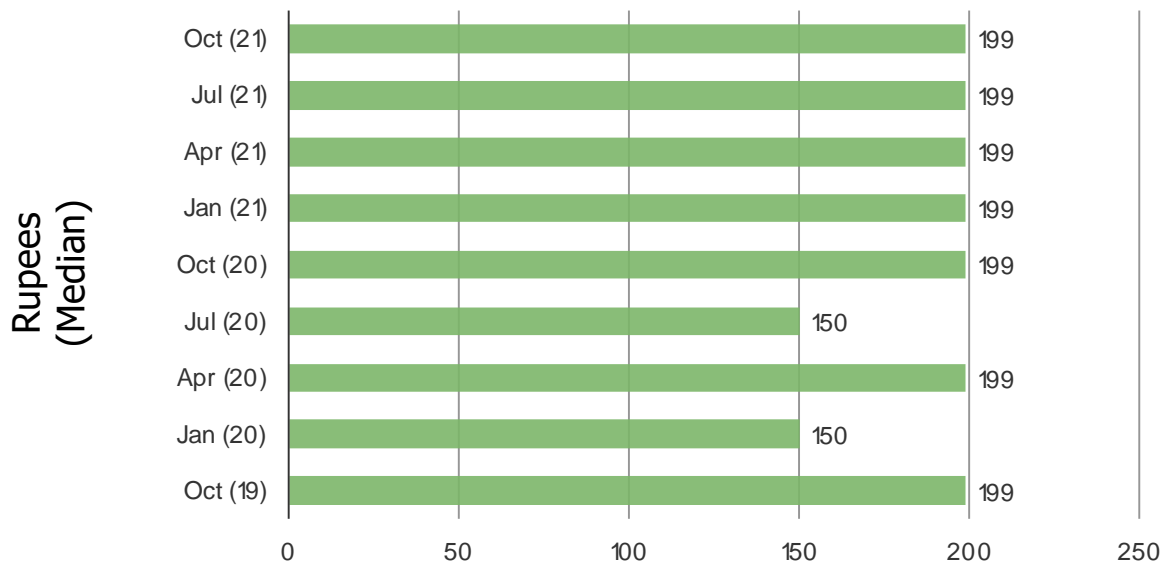
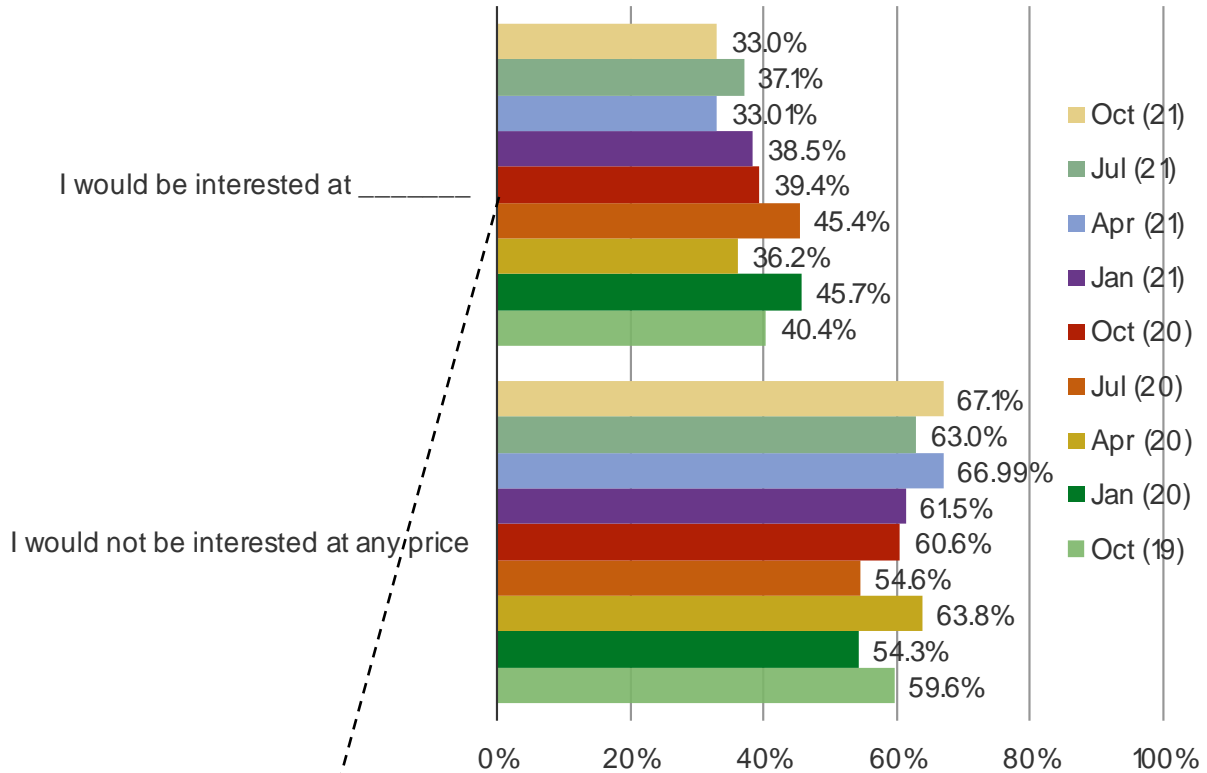
HOW INTERESTED ARE YOU IN CHECKING OUT FREE CONTENT FROM NETFLIX ON A LIMITED BASIS FOR THEIR SHOWS?

Posed to non-Netflix subscribers



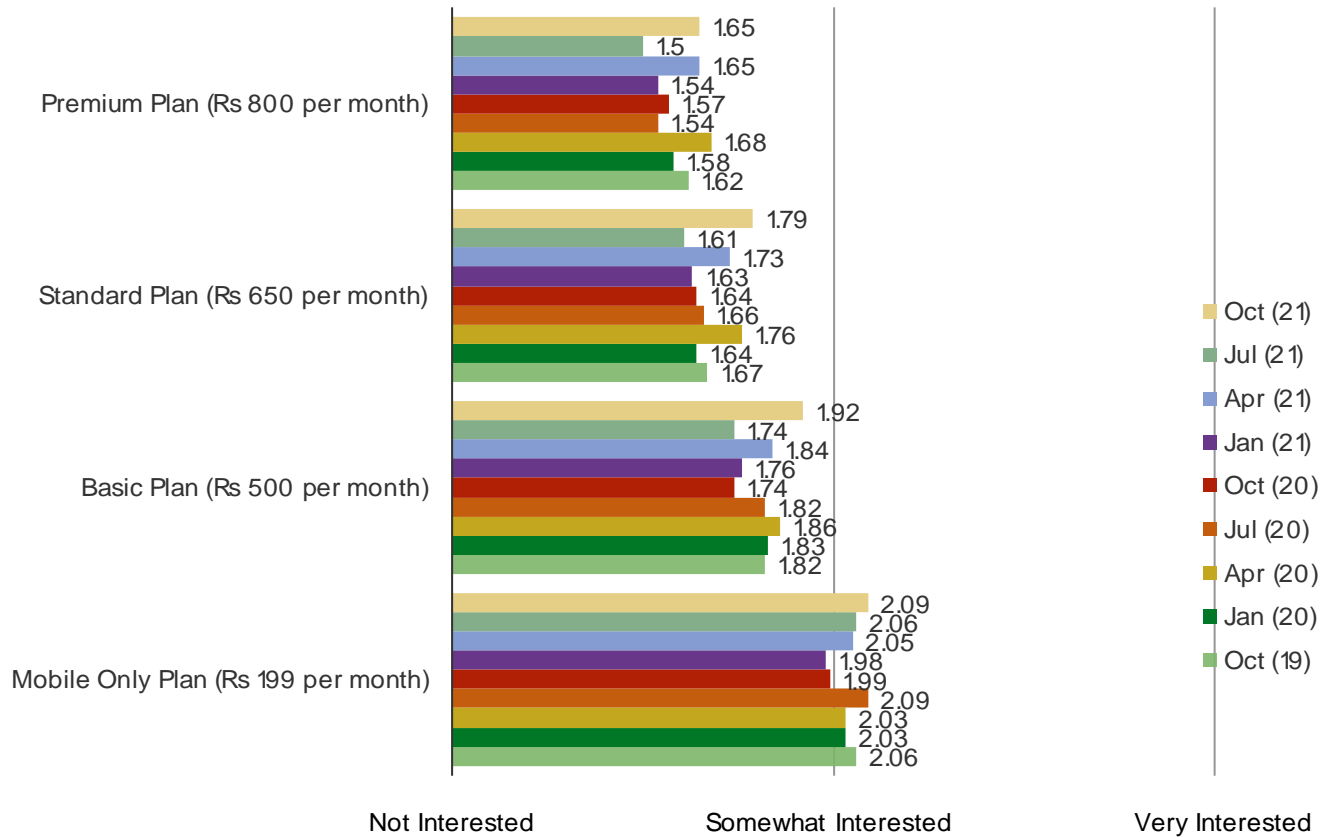
AT WHAT PRICE PER MONTH WOULD IT MAKE SENSE FOR YOU TO PAY FOR NETFLIX?

Posed to non-Netflix subscribers



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

Posed to non-Netflix subscribers

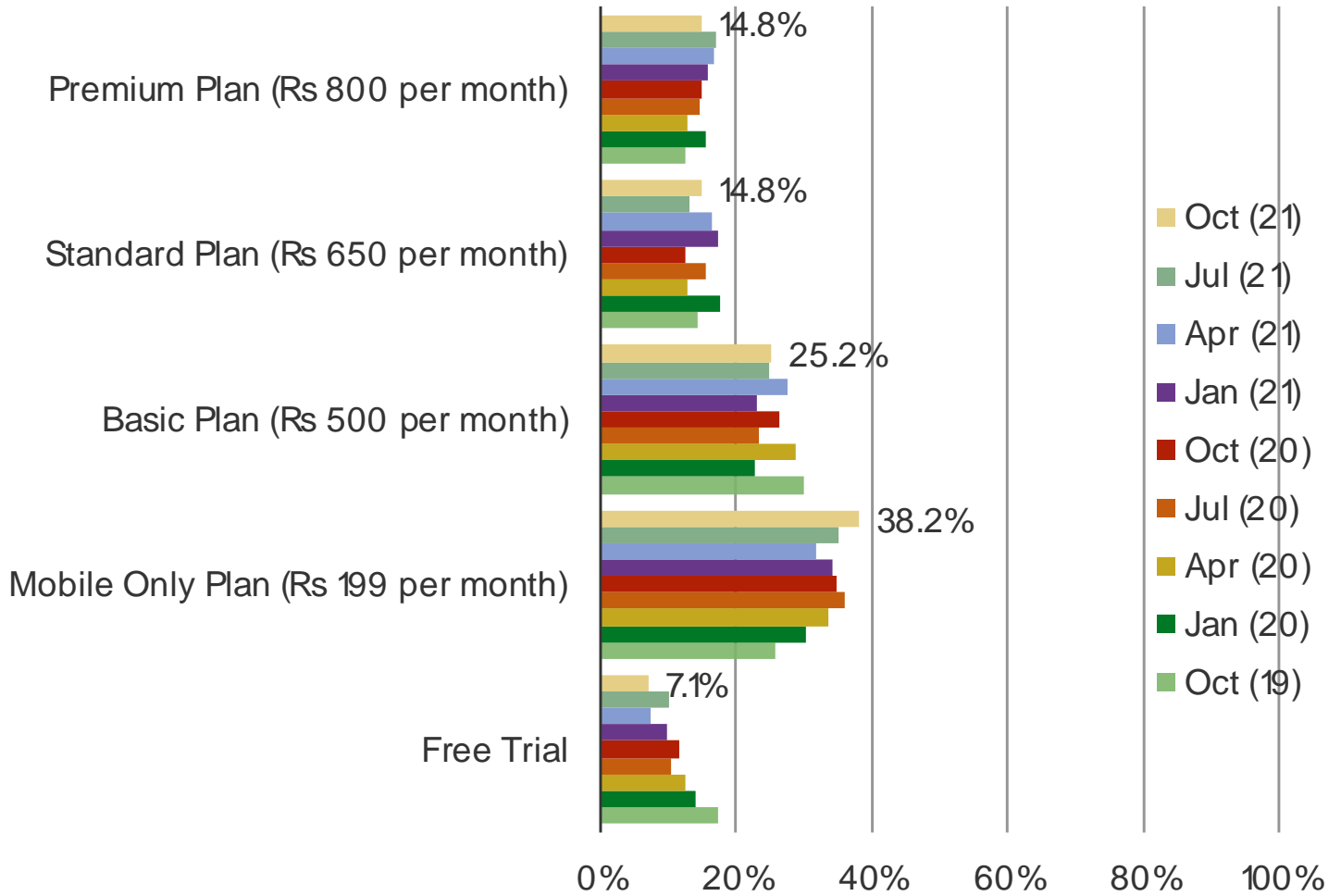


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NETFLIX SUBSCRIBERS

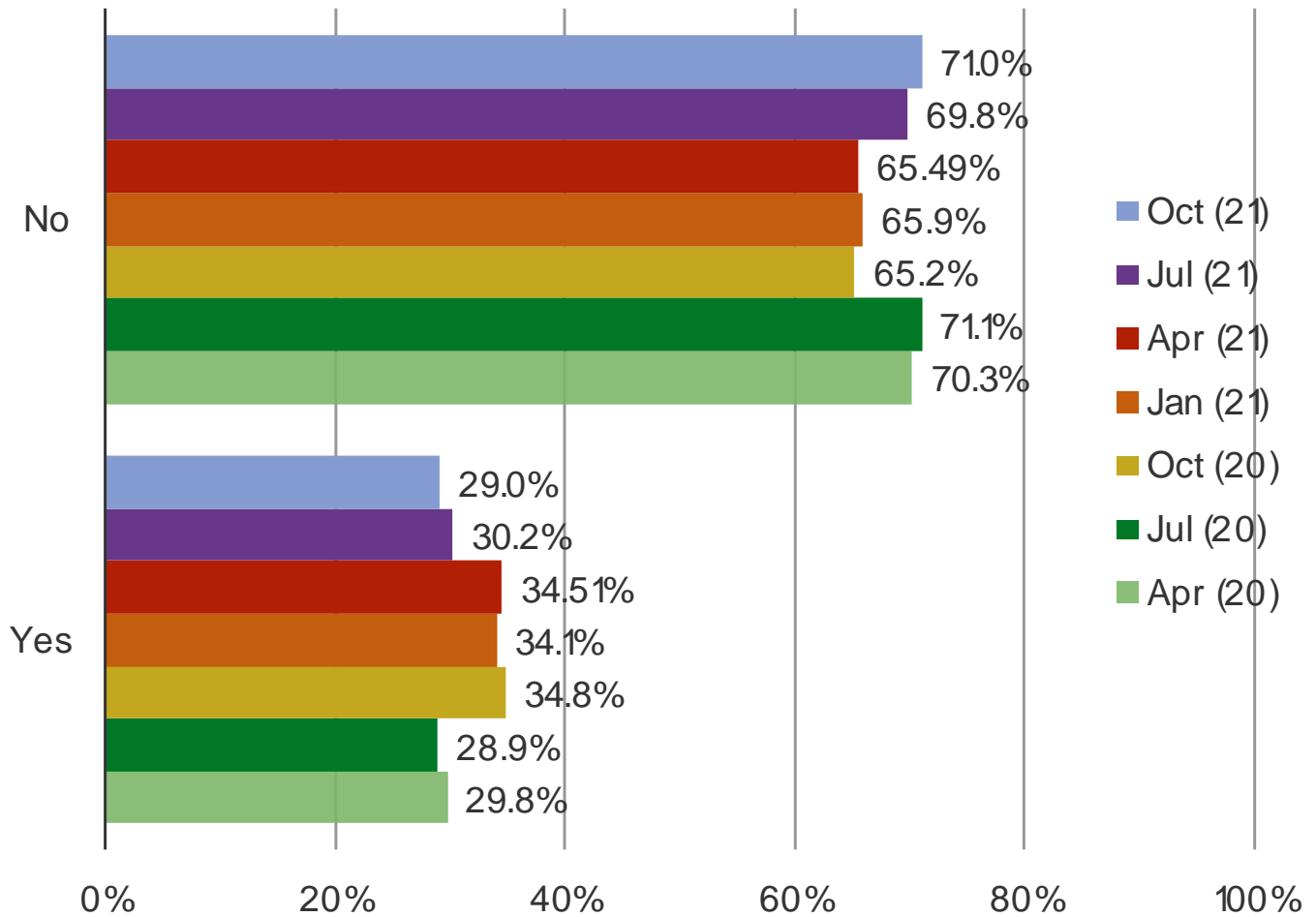
WHICH NETFLIX PLAN ARE YOU SUBSCRIBED TO?

Posed to Netflix subscribers



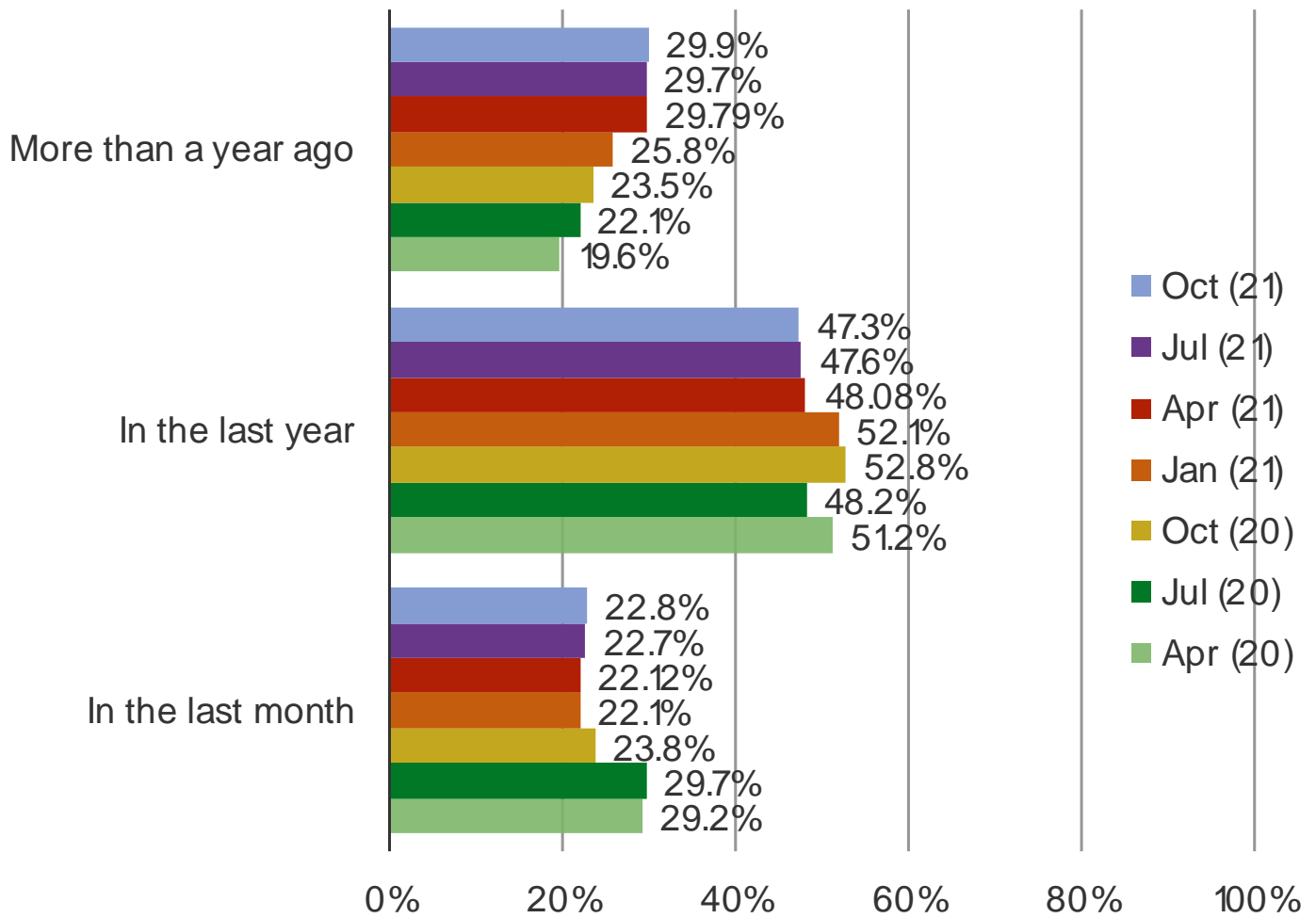
ARE YOU CONSIDERING CANCELLING YOUR NETFLIX SUBSCRIPTION IN THE NEXT FEW MONTHS?

Posed to Netflix subscribers



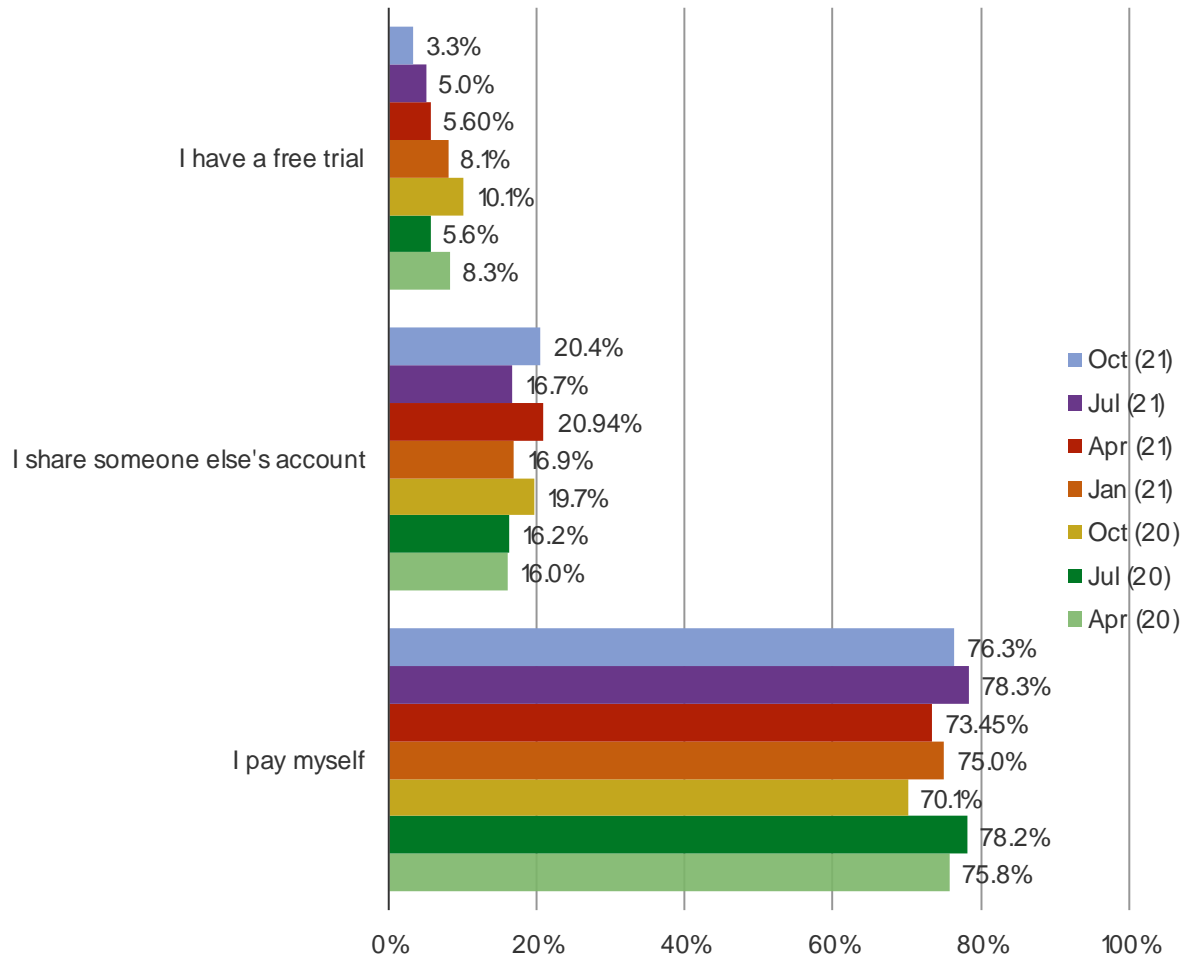
WHEN DID YOU SUBSCRIBE TO NETFLIX?

Posed to Netflix subscribers



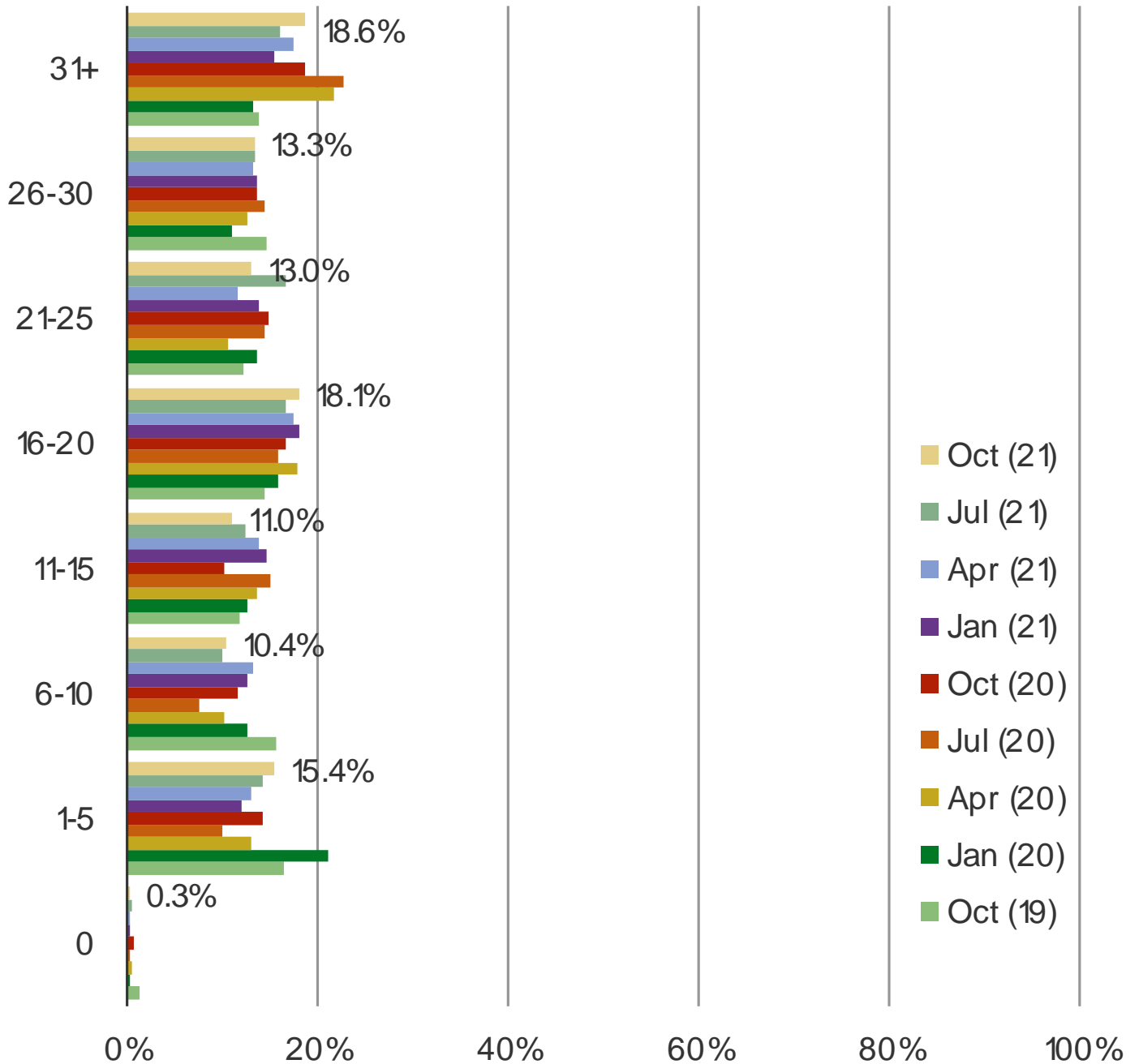
DO YOU PAY FOR YOUR NETFLIX ACCOUNT YOURSELF OR DO YOU SHARE AN ACCOUNT WITH SOMEONE ELSE?

Posed to Netflix subscribers



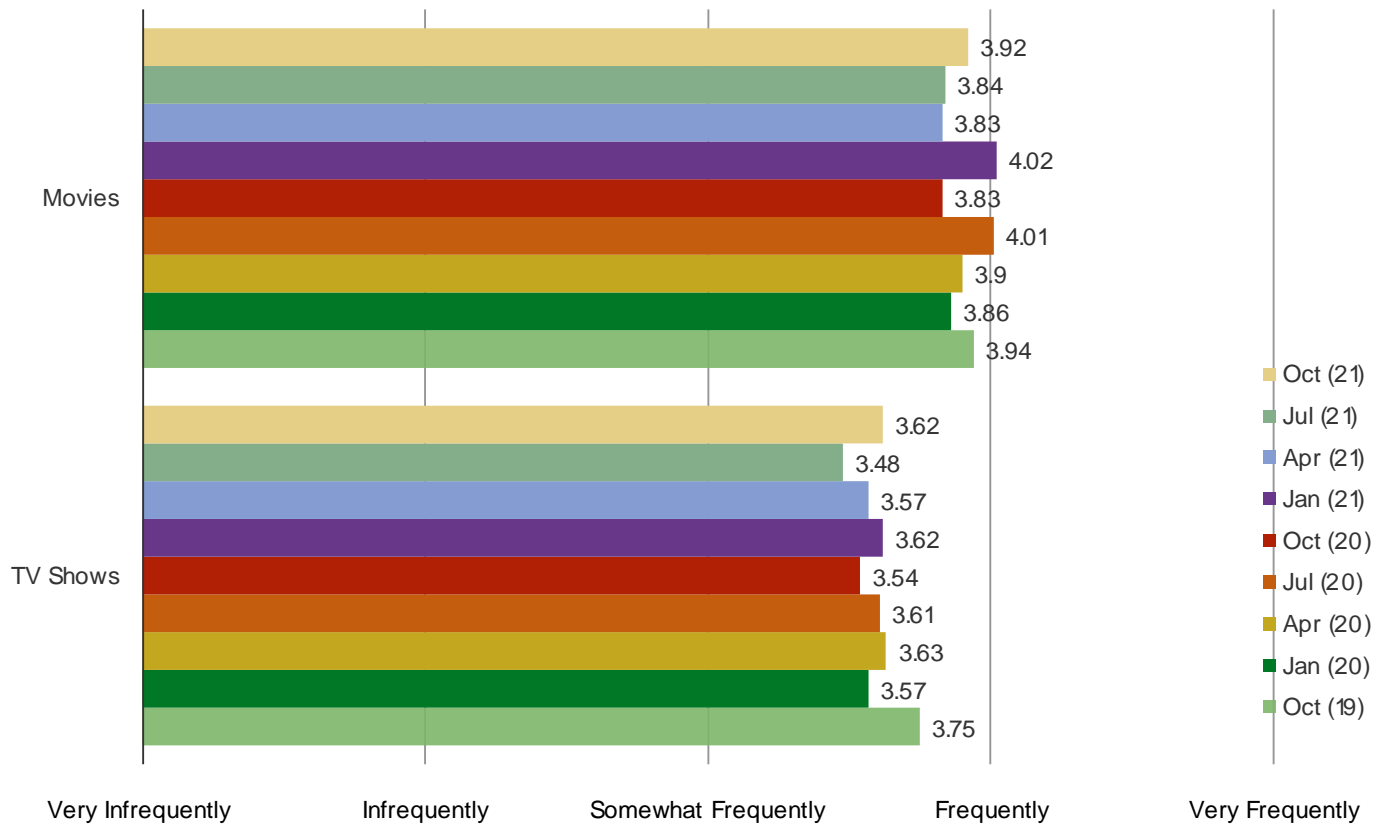
IN AN AVERAGE MONTH, HOW MANY HOURS OF NETFLIX DO YOU WATCH?

Posed to Netflix subscribers



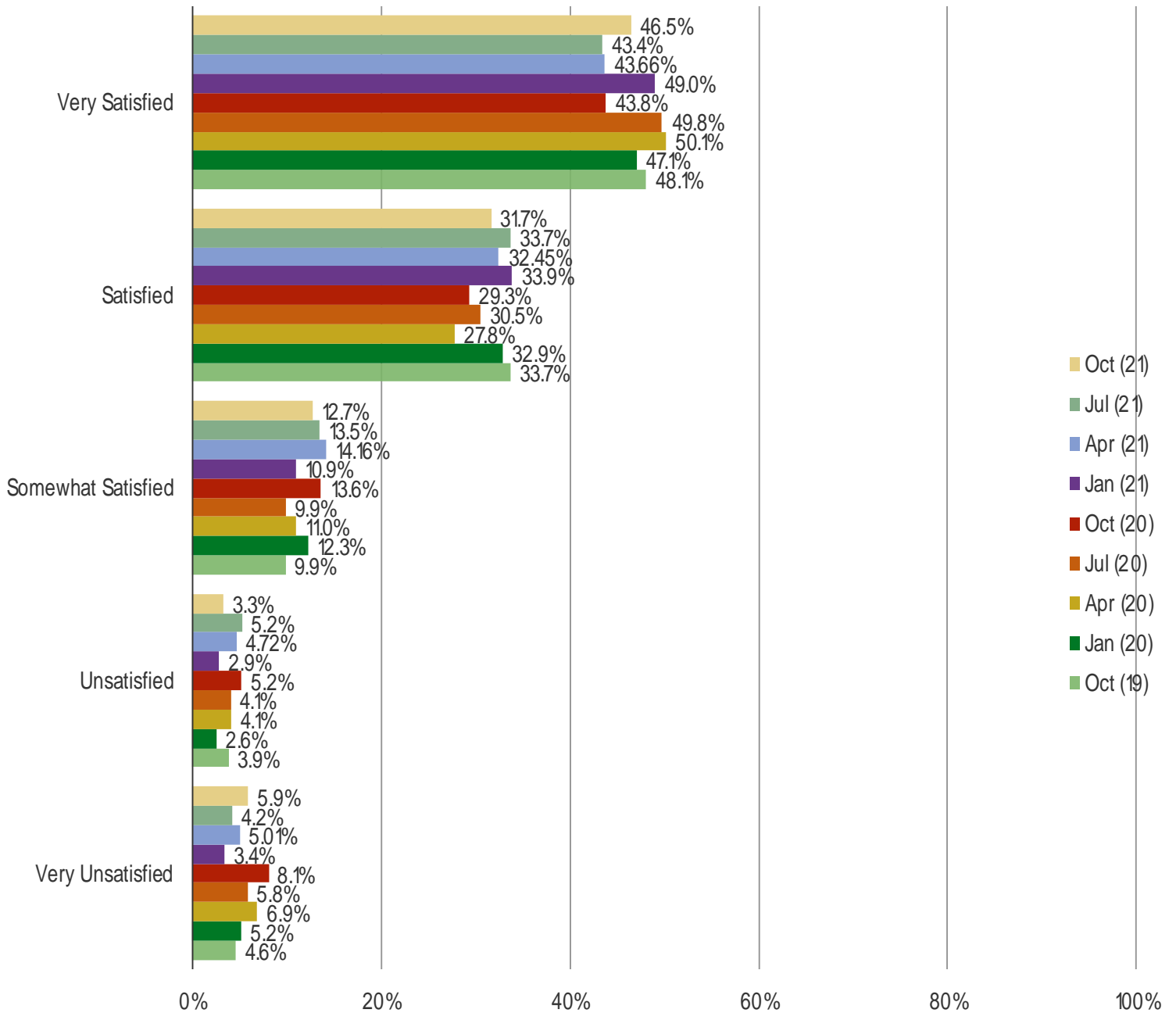
ON AVERAGE, HOW FREQUENTLY DO YOU USE NETFLIX TO WATCH TV SHOWS AND MOVIES?

Posed to Netflix subscribers



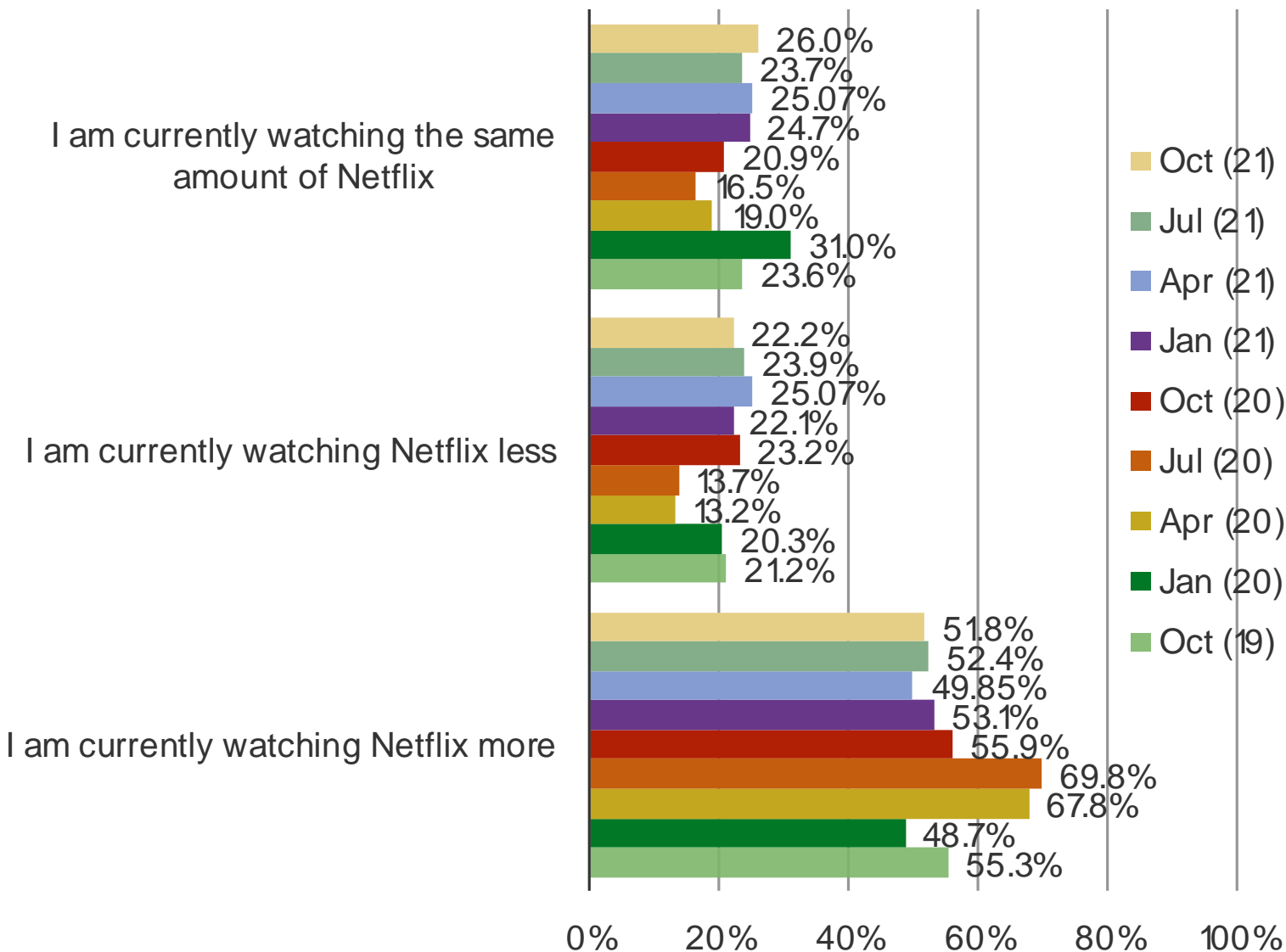
HOW SATISFIED ARE YOU WITH YOUR NETFLIX SUBSCRIPTION?

Posed to Netflix subscribers



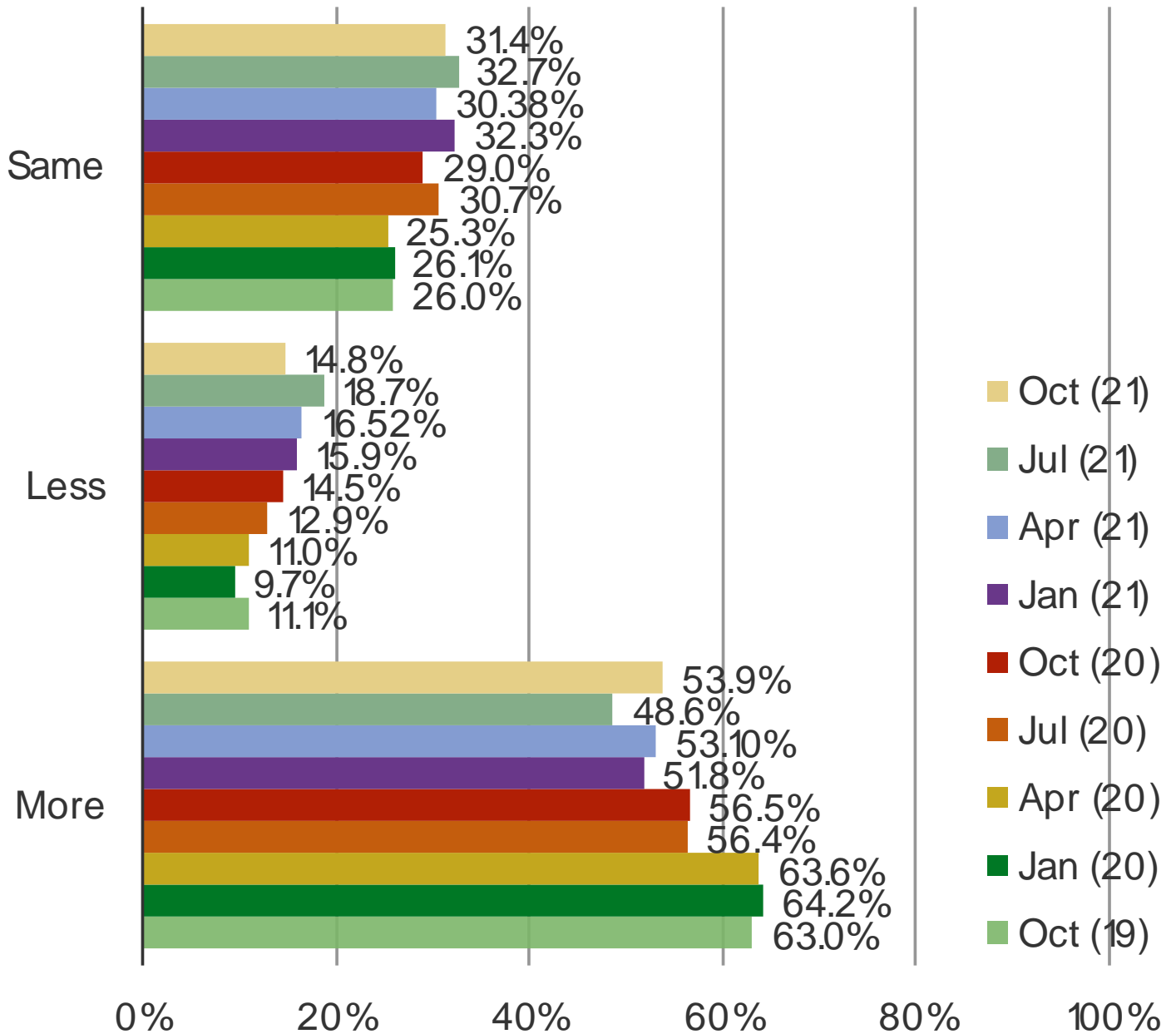
PLEASE COMPARE YOUR CURRENT USAGE OF NETFLIX WITH OUR USAGE 3-6 MONTHS AGO.

Posed to Netflix subscribers



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

Posed to Netflix subscribers

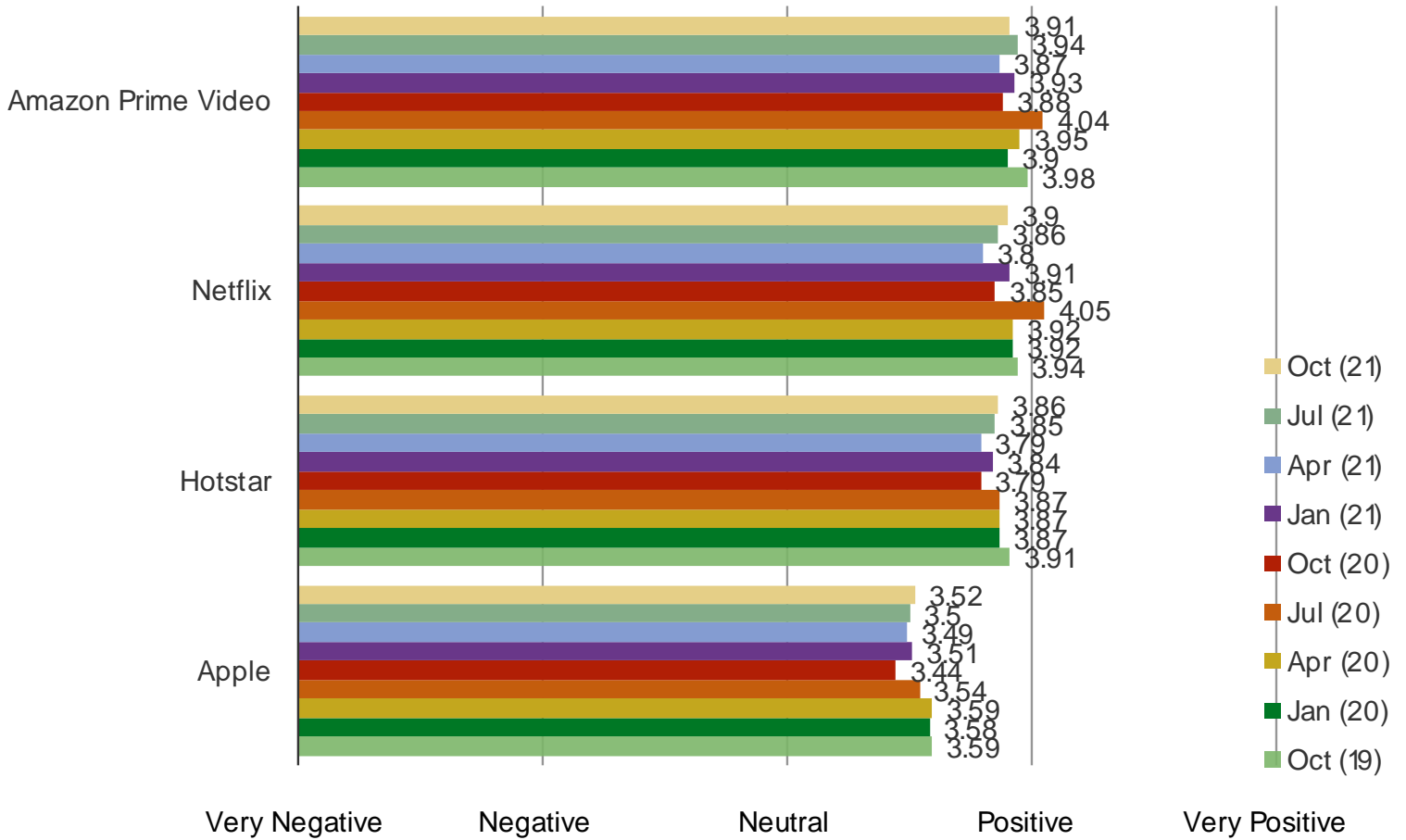


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SENTIMENT AND POPULARITY

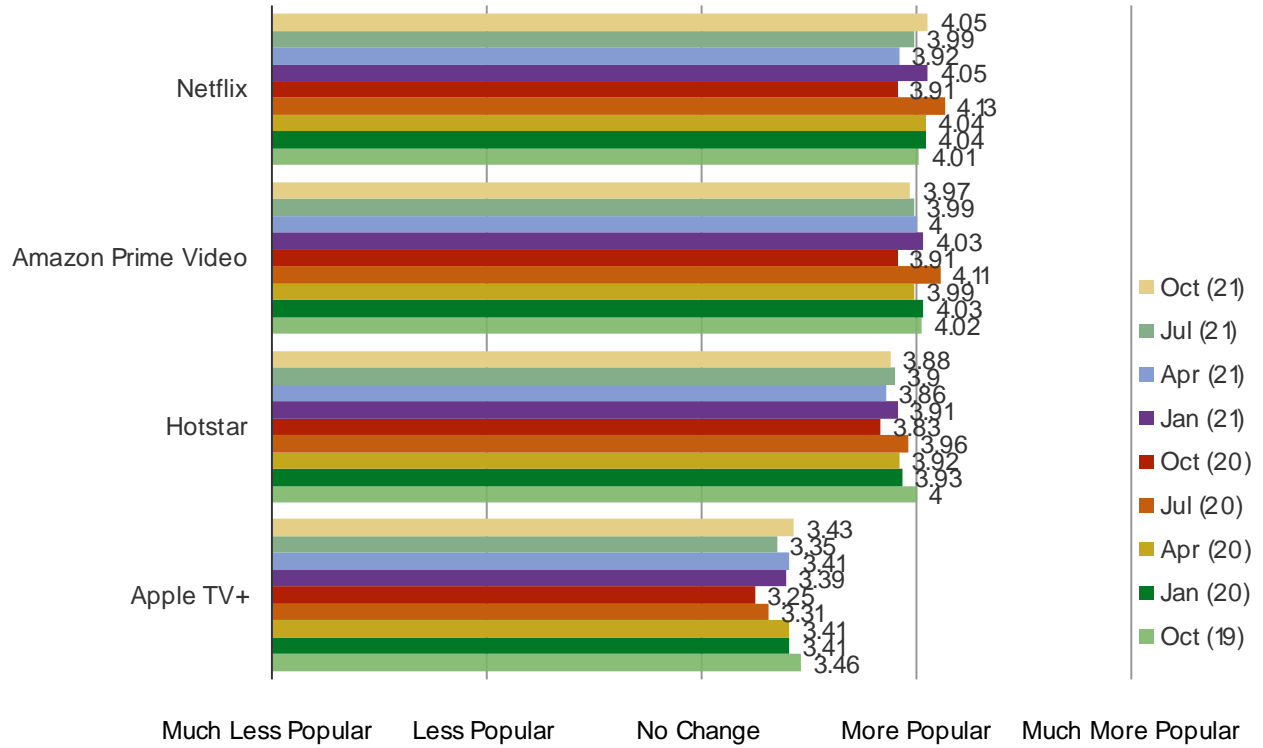
WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS OVERALL?

Posed to all respondents



ARE THE FOLLOWING GETTING MORE OR LESS POPULAR IN INDIA?

Posed to all respondents

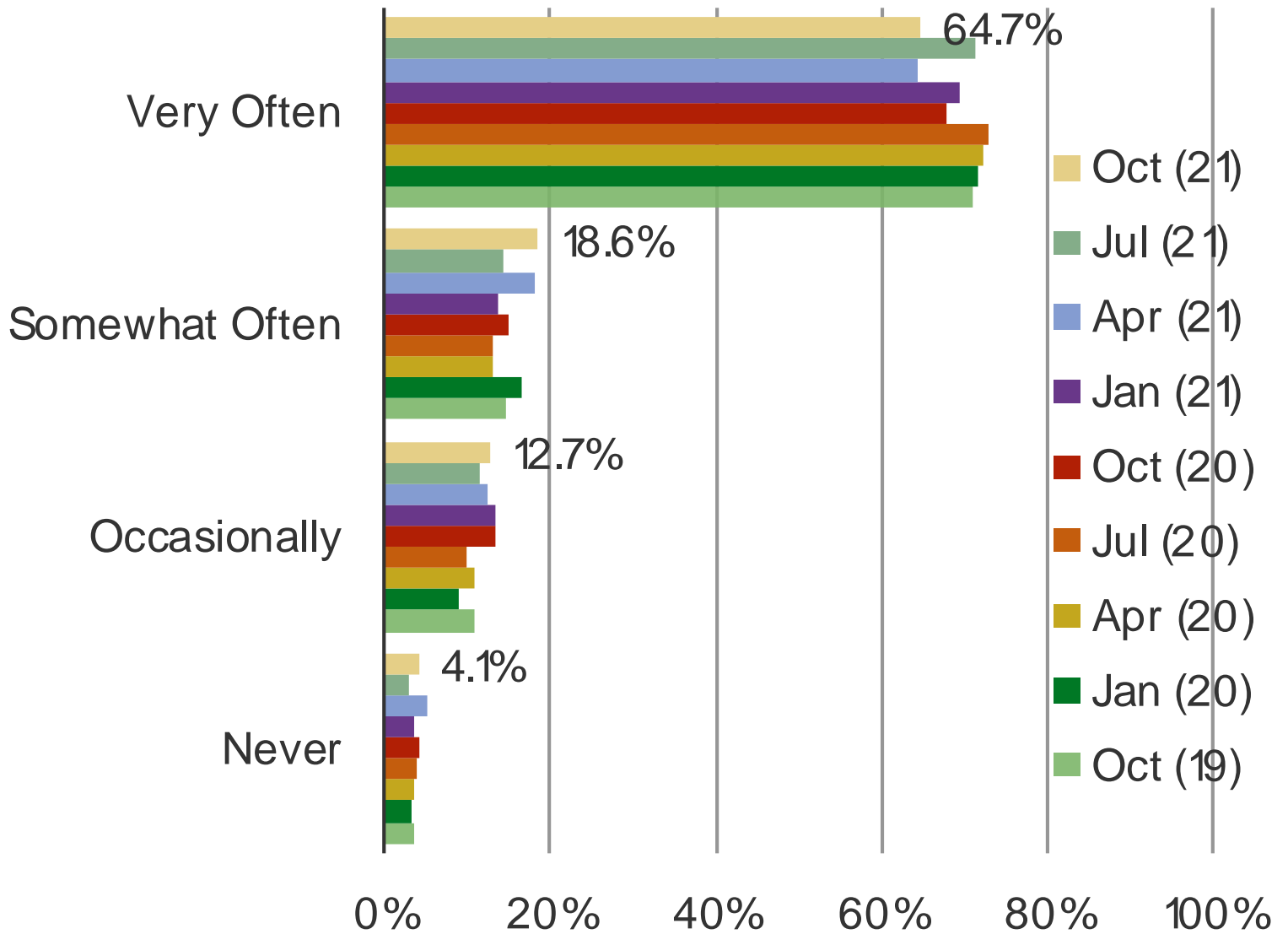


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INTERNET USAGE

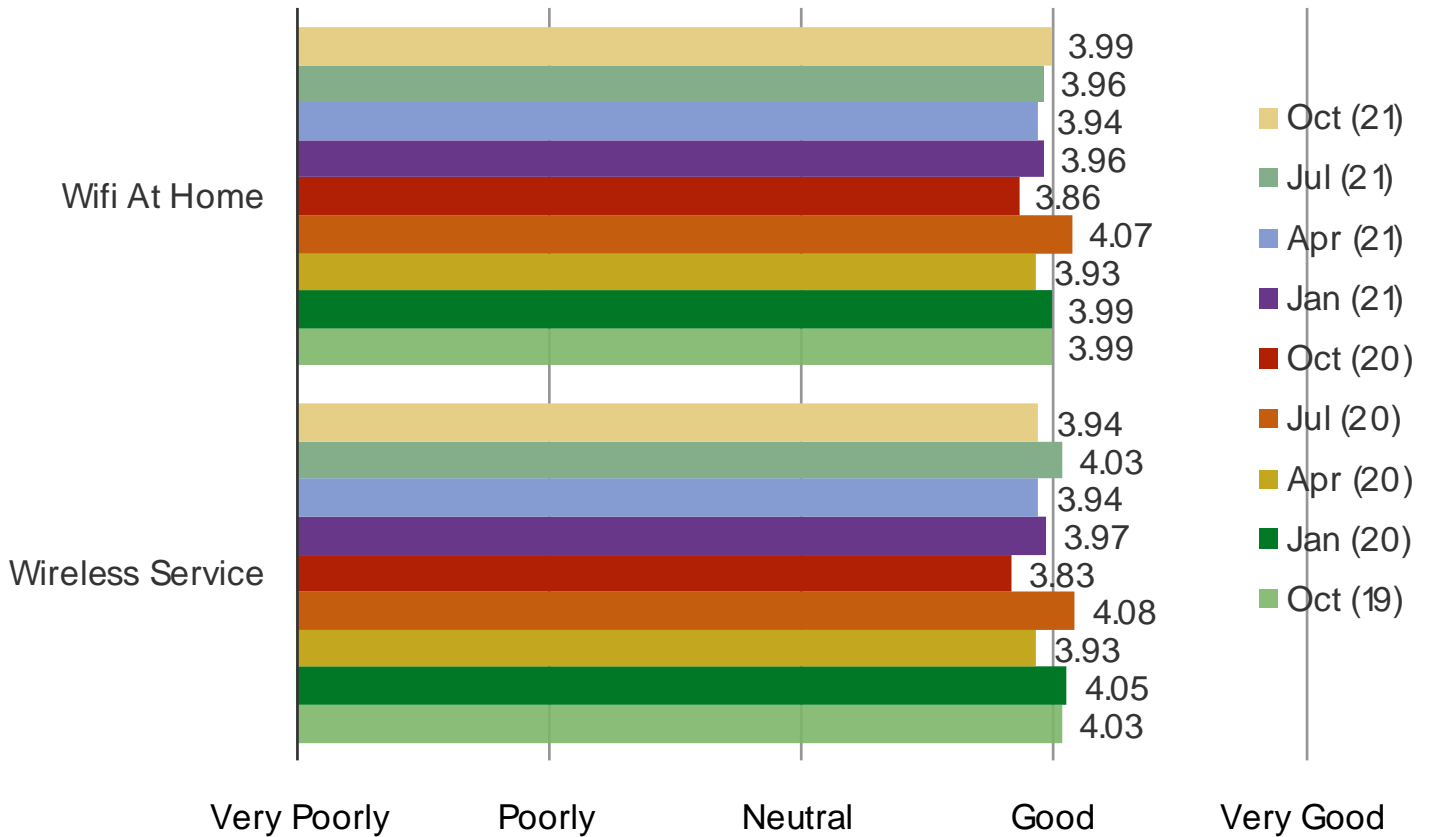
HOW OFTEN DO YOU ACCESS THE INTERNET?

Posed to all respondents



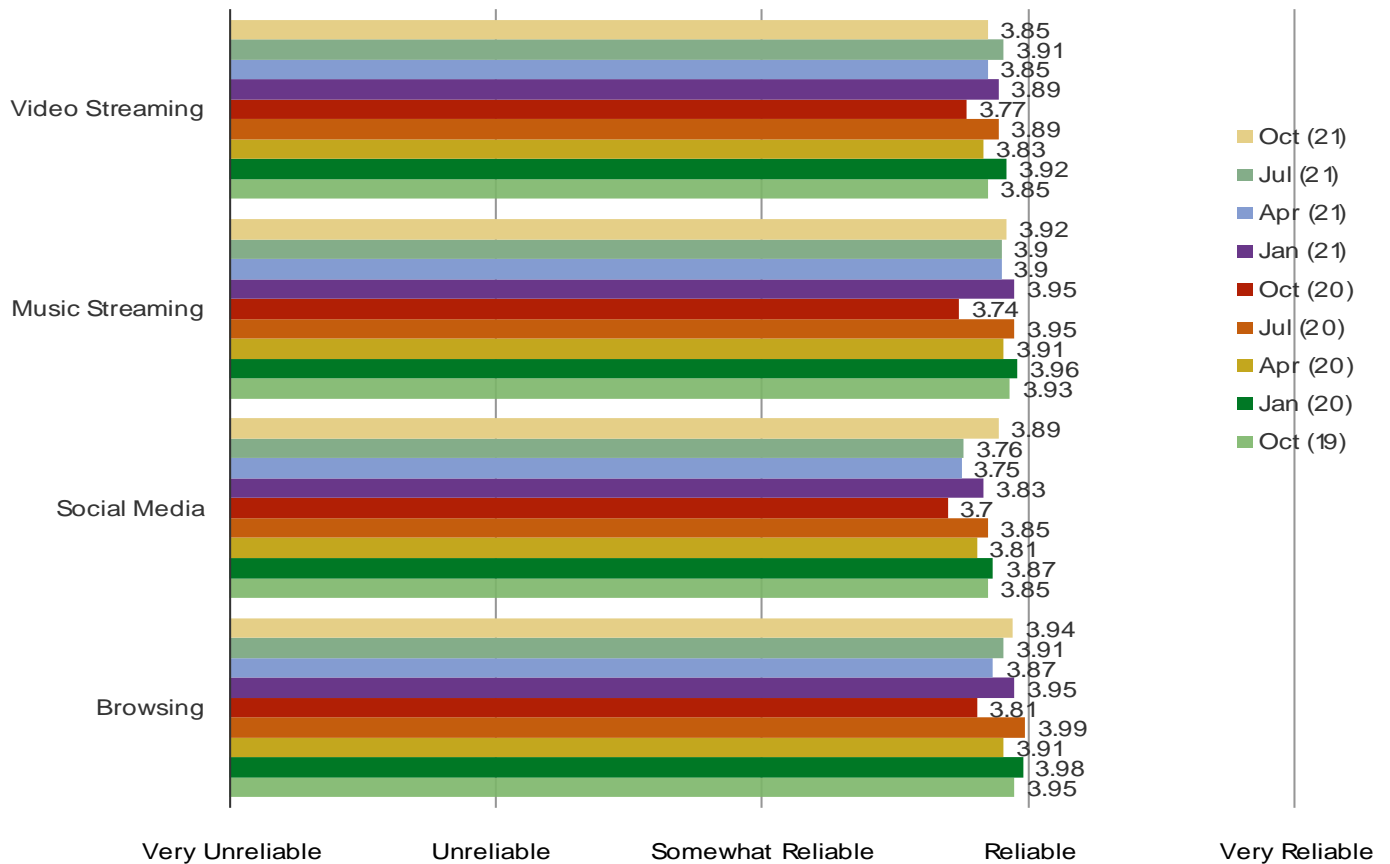
HOW WELL DOES THE INTERNET WORK ON YOUR DEVICE?

Posed to respondents who at least occasionally access the internet



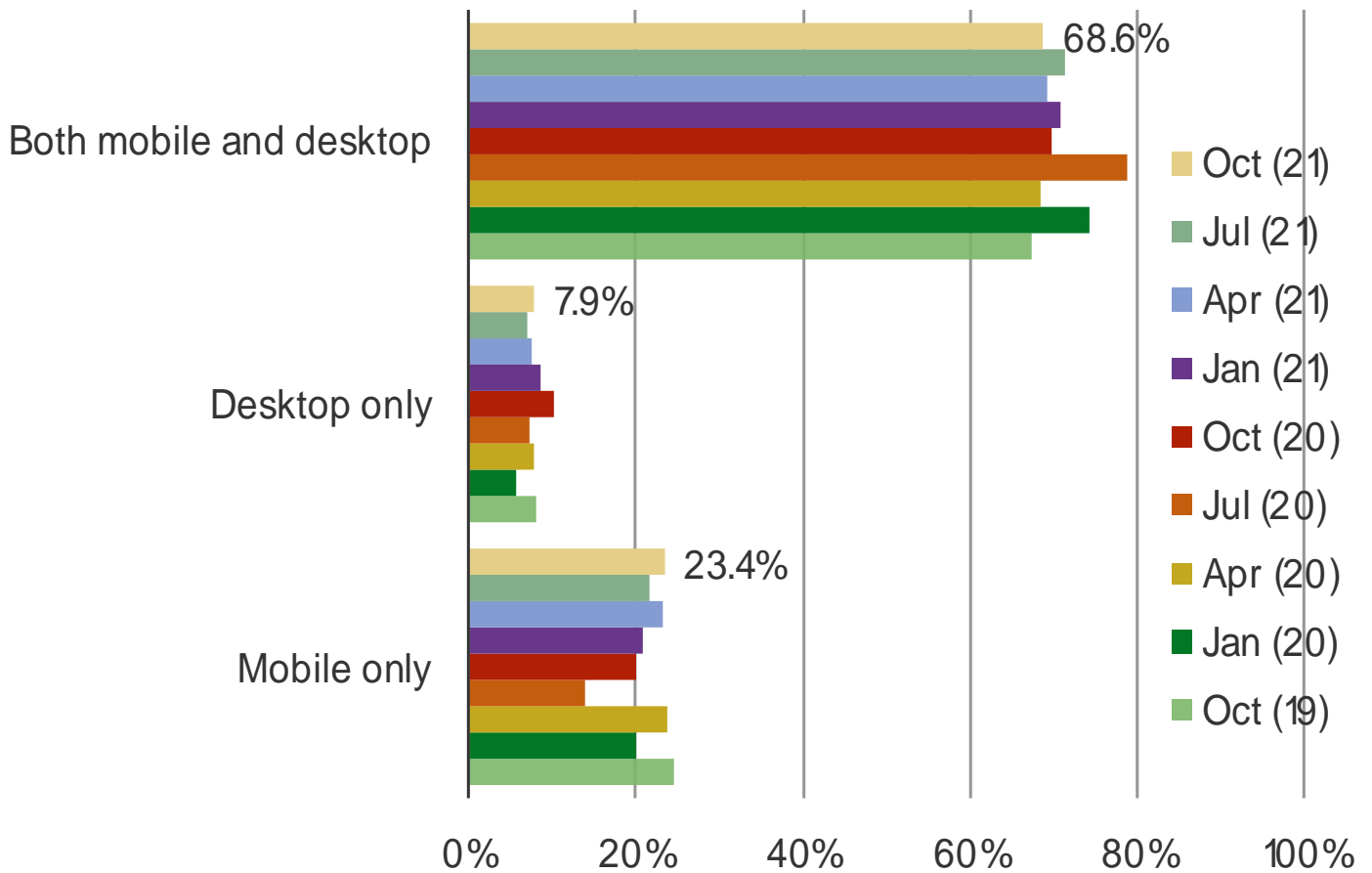
HOW EFFECTIVE ARE THE SERVICES YOU USE TO CONNECT TO THE INTERNET?

Posed to respondents who at least occasionally access the internet



HOW DO YOU LIKE ACCESSING THE INTERNET?

Posed to respondents who at least occasionally access the internet

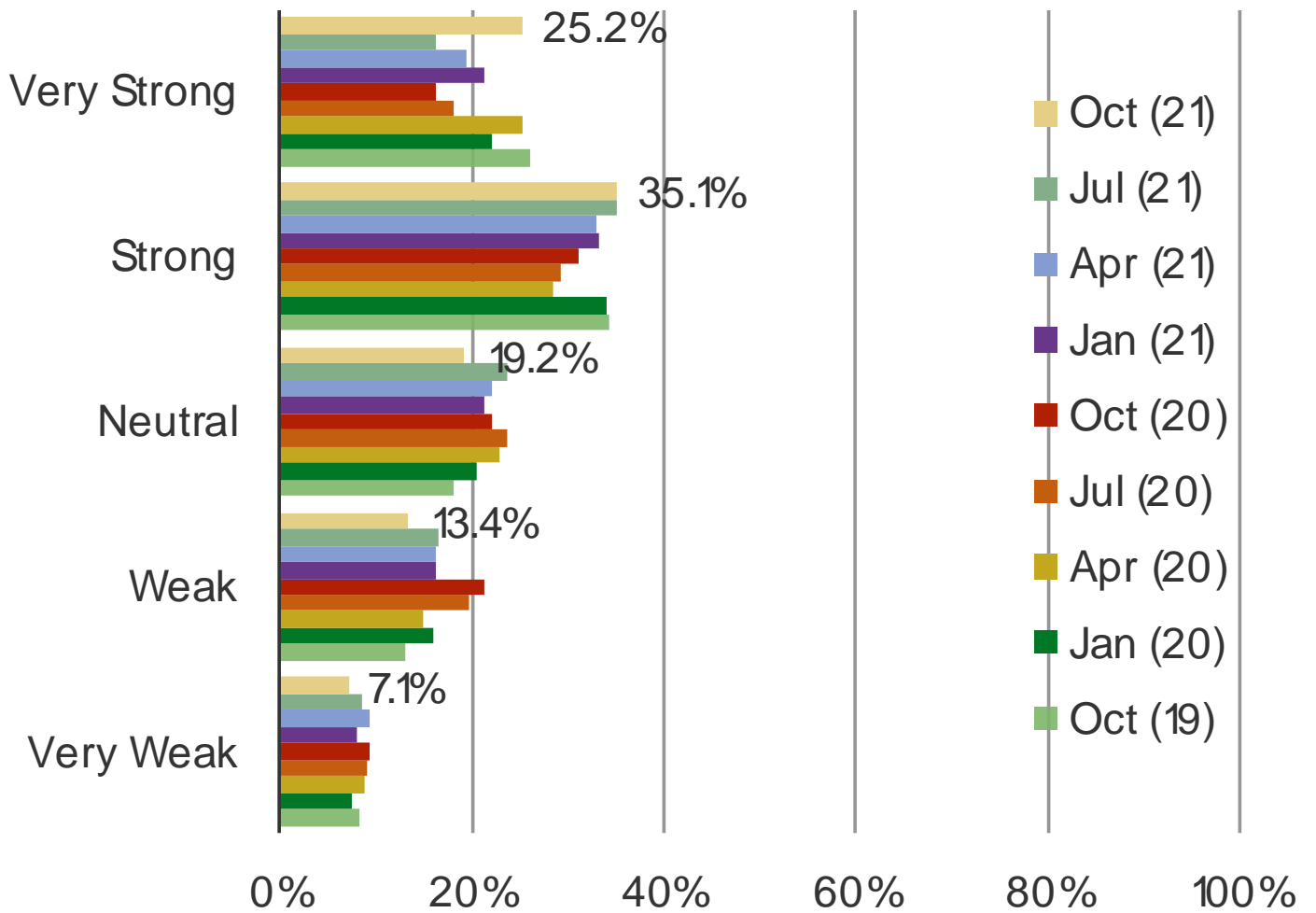


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MACRO FACTORS

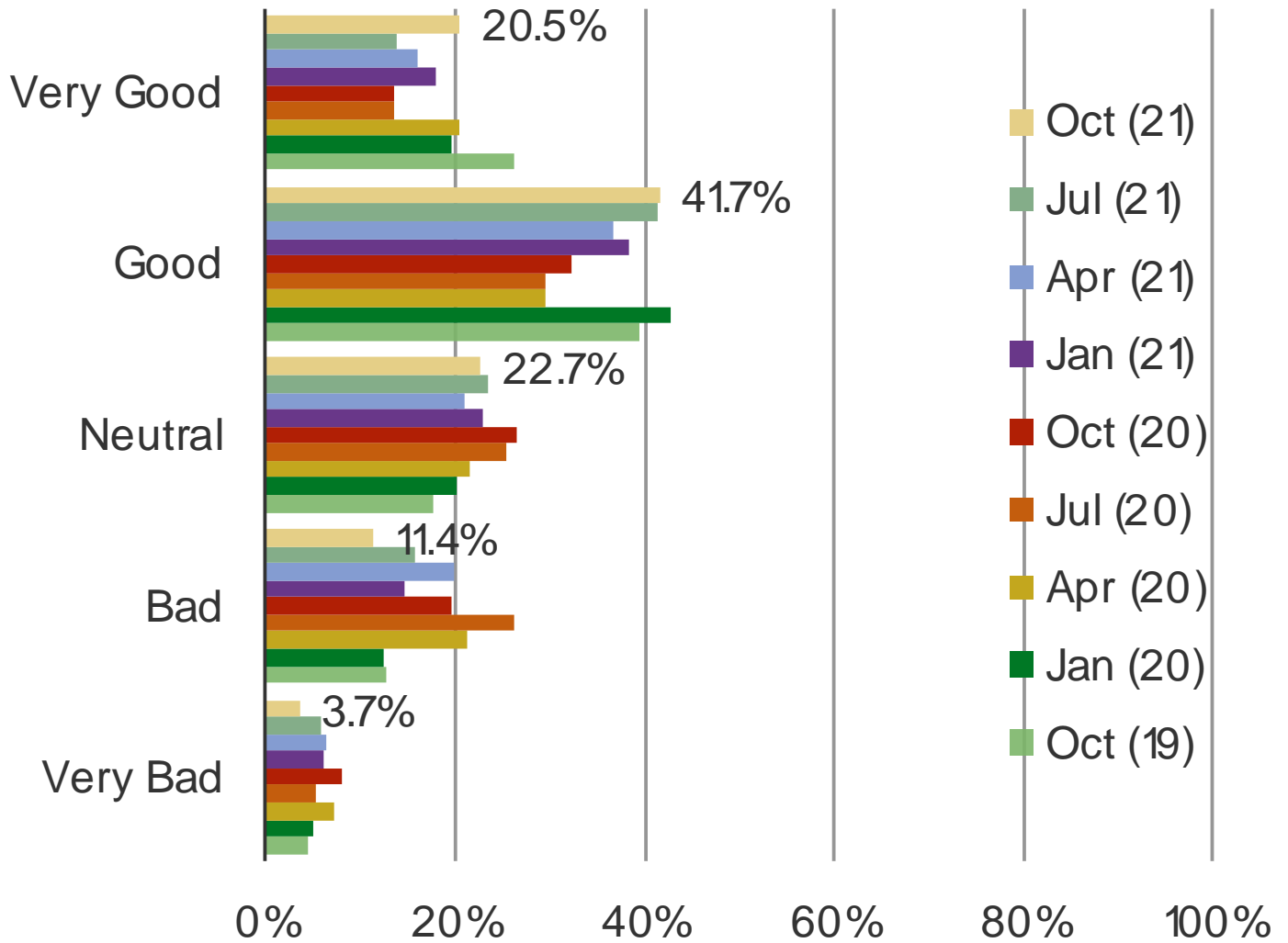
OVERALL HOW CONFIDENT DO YOU FEEL IN THE ECONOMY?

Posed to all respondents



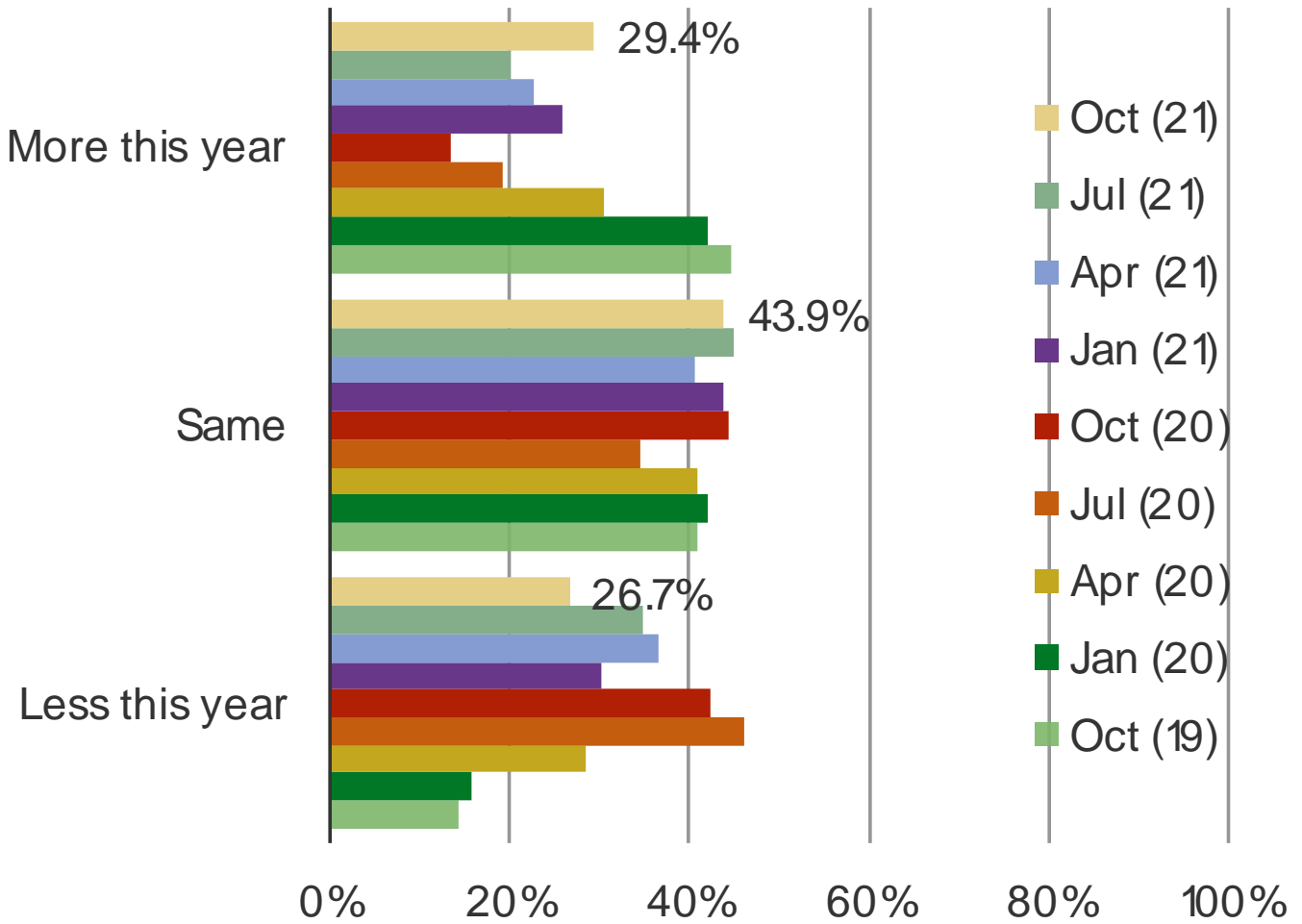
HOW DO YOU FEEL ABOUT YOUR PERSONAL FINANCES AT THIS TIME?

Posed to all respondents



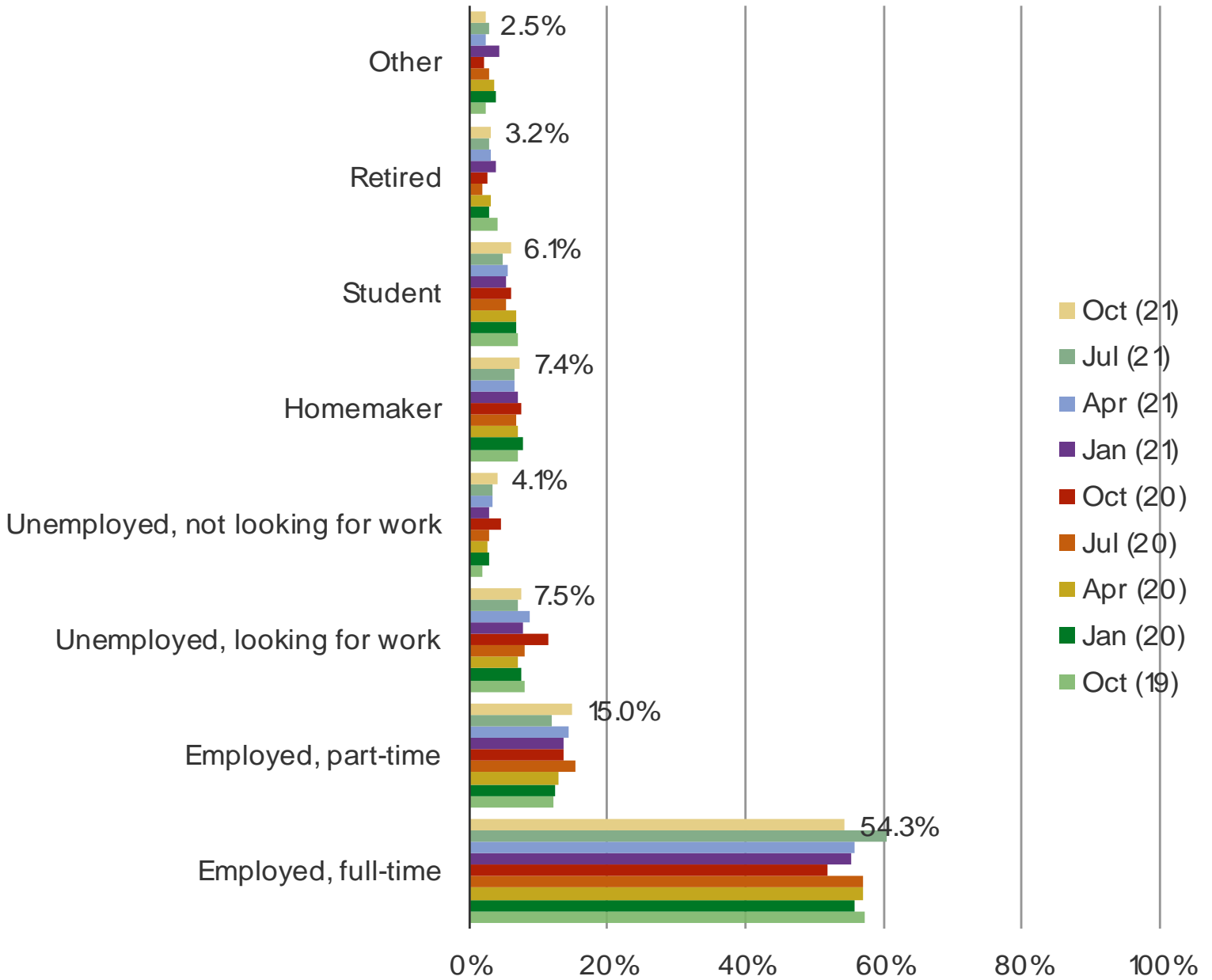
IS YOUR INCOME MORE OR LESS THIS YEAR THAN IN THE PREVIOUS YEAR?

Posed to all respondents



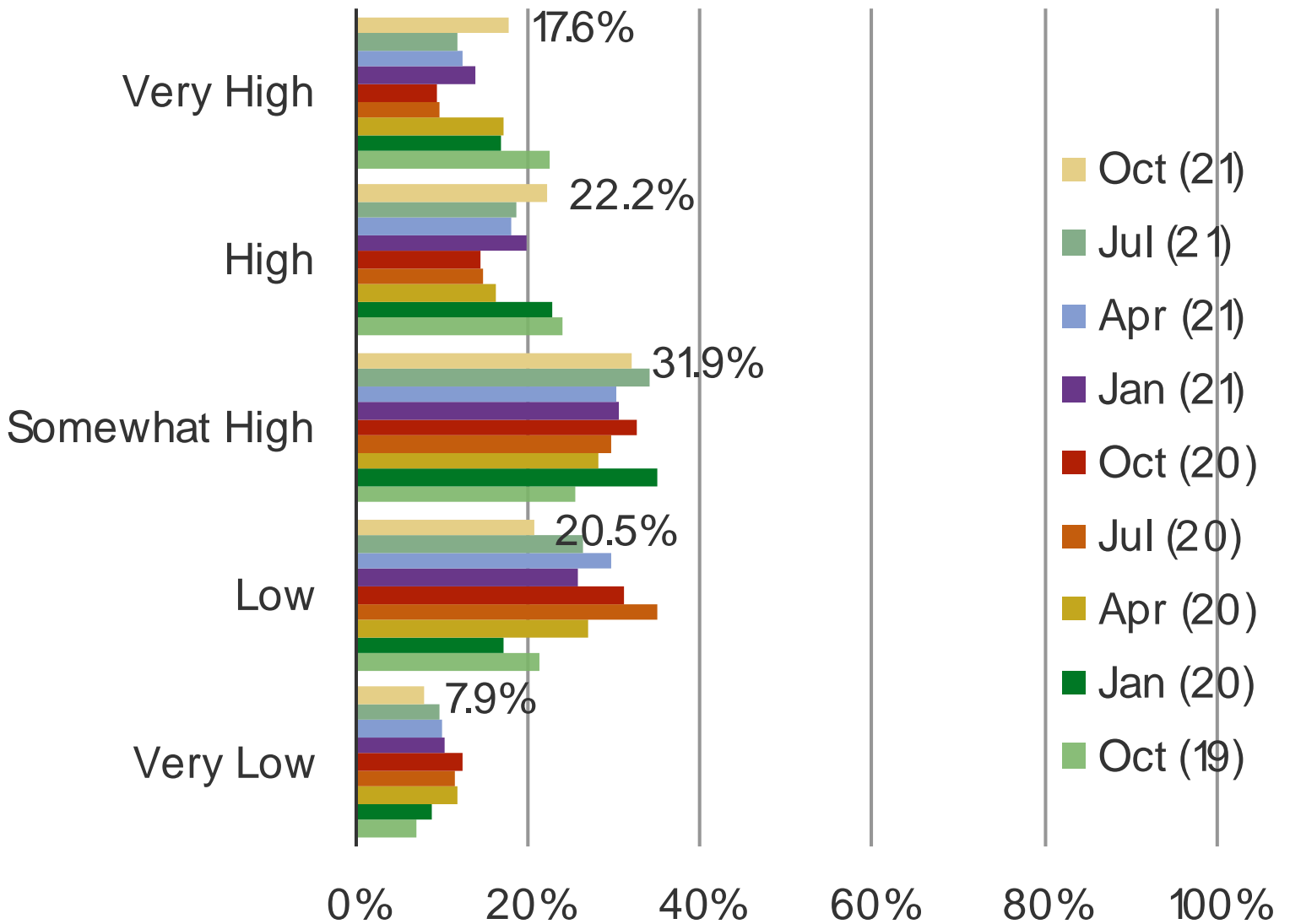
WHAT IS YOUR EMPLOYMENT STATUS?

Posed to all respondents



PLEASE EVALUATE YOUR CONFIDENCE ABOUT SPENDING MONEY AT THIS TIME

Posed to all respondents

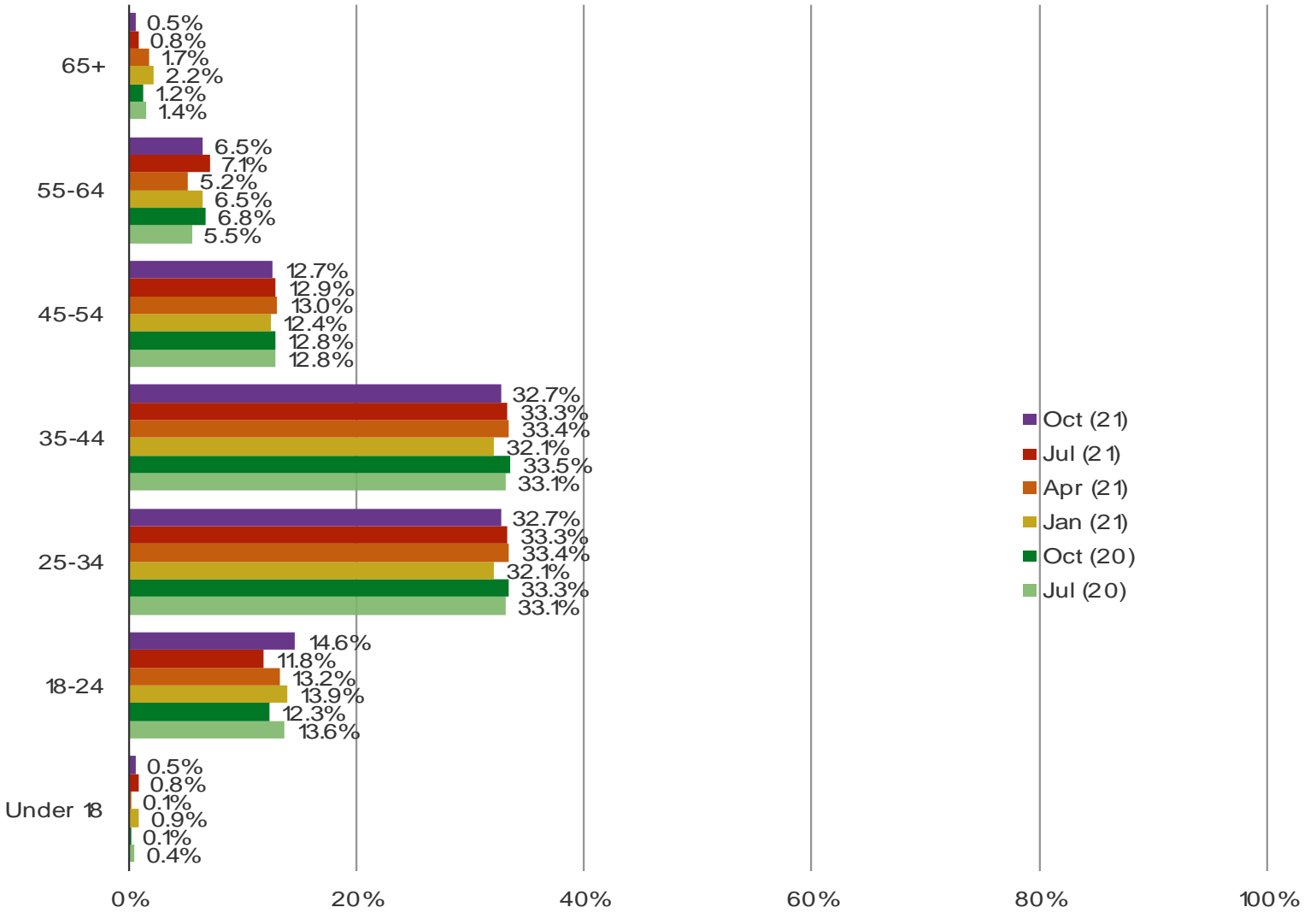


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DEMOGRAPHICS

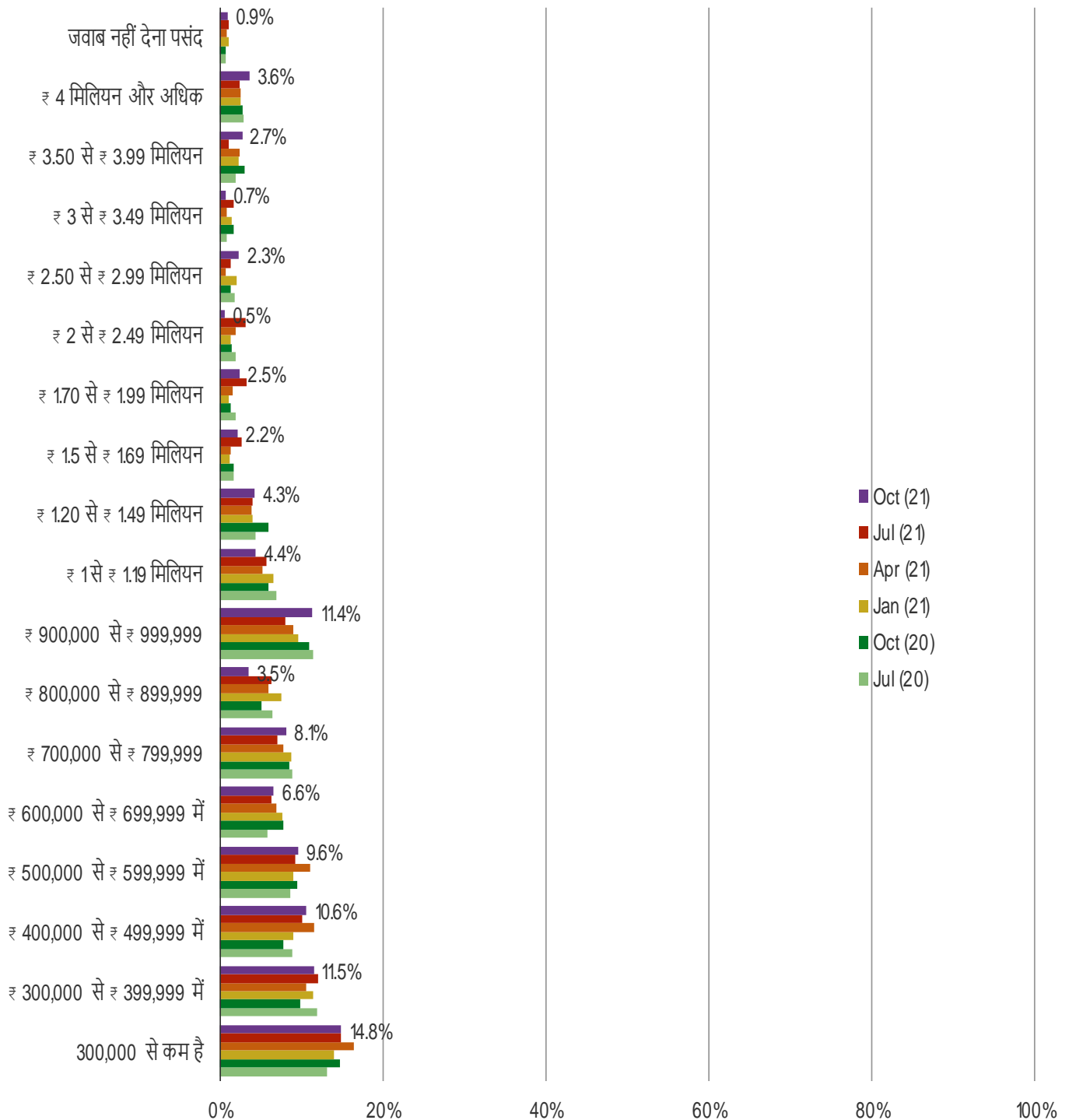
AGE

Posed to all respondents



INCOME

Posed to all respondents



GENDER

Posed to all respondents

