
Streaming Video Domestic Platform Cross-Over and Monthly Updates

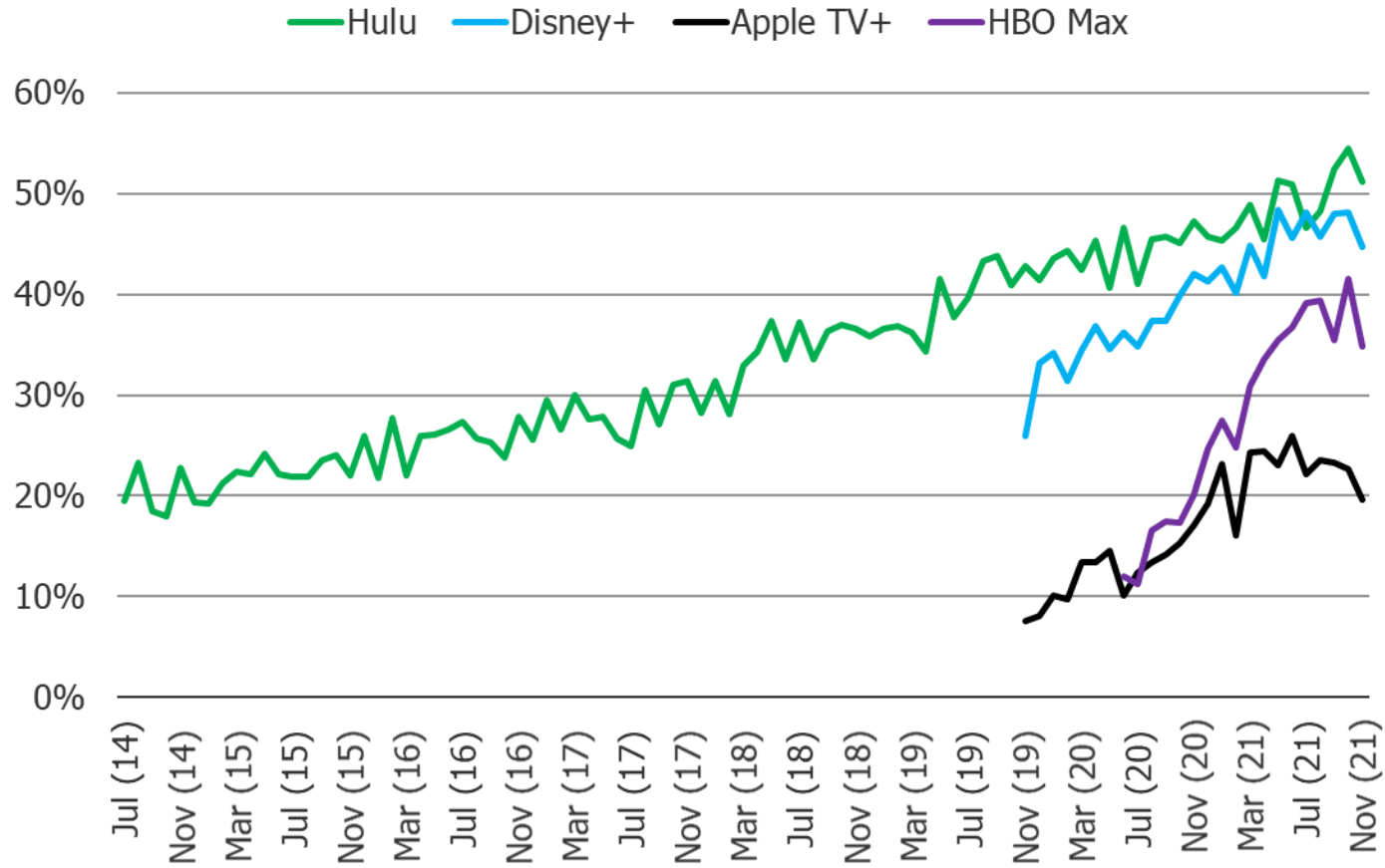
December 2021

Netflix Competitors: Additive or Replacement?

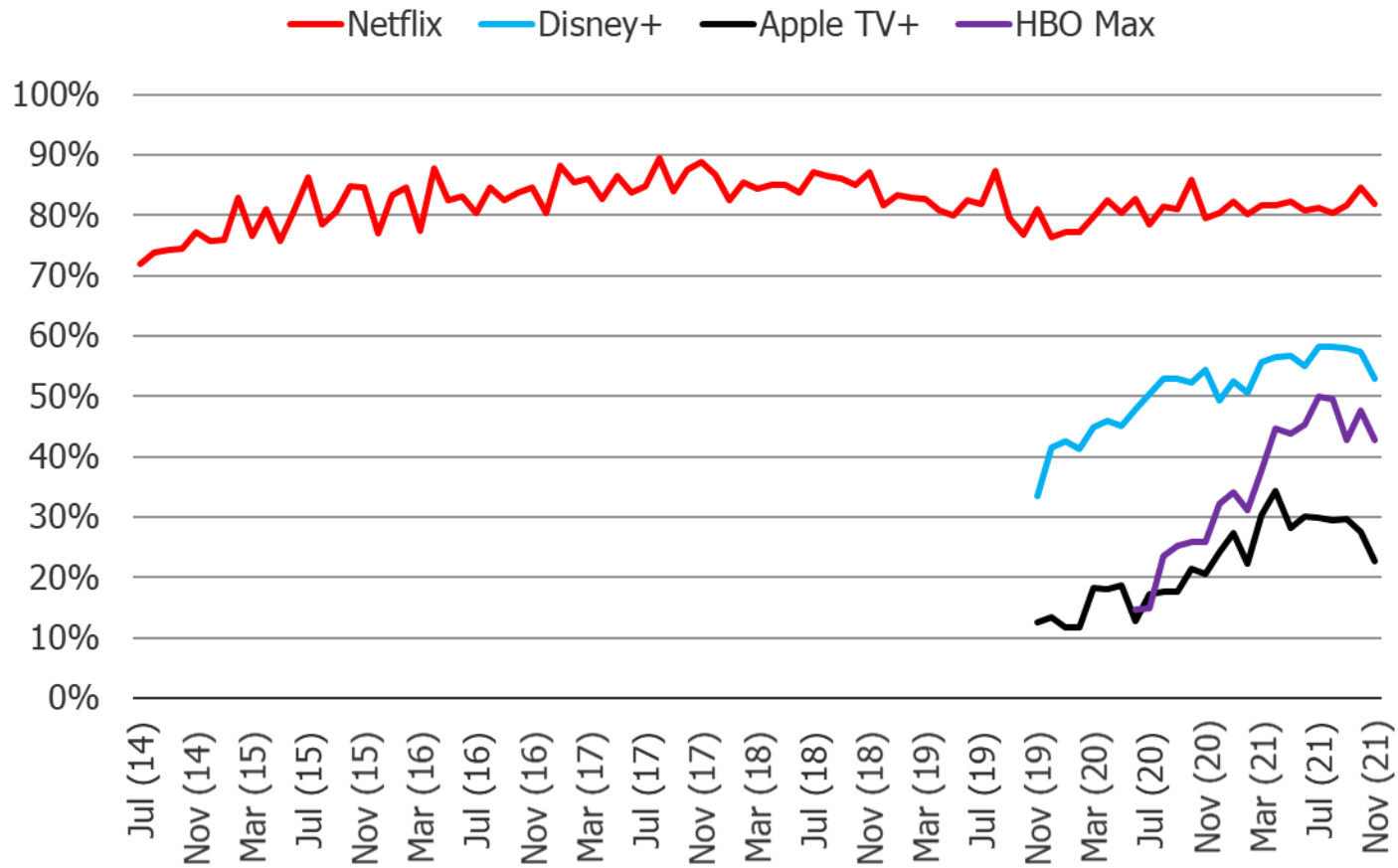
Consumers have been increasingly likely to tell us, when asked directly, that newer competitors would be additive to Netflix (as opposed to replacement).

This sentiment ties out with cross-over analysis of platform usage. IE – Netflix users have increased adoption of newer competitors over time (like Disney+ and HBO Max). But, importantly, the percentage of HBO Max and Disney+ users who ALSO use Netflix has remained consistent over time.

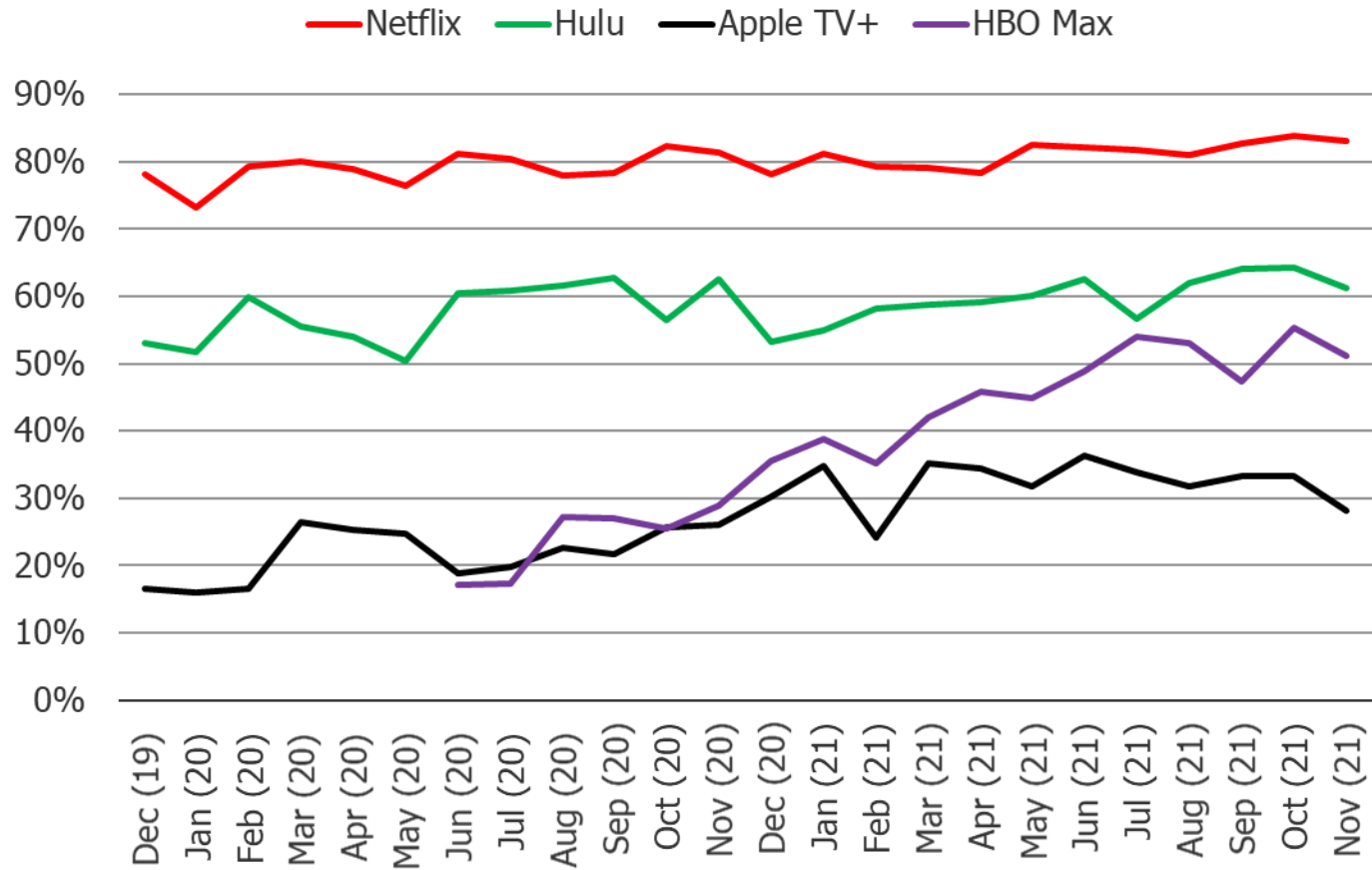
Netflix Users: Also Has An Account With...



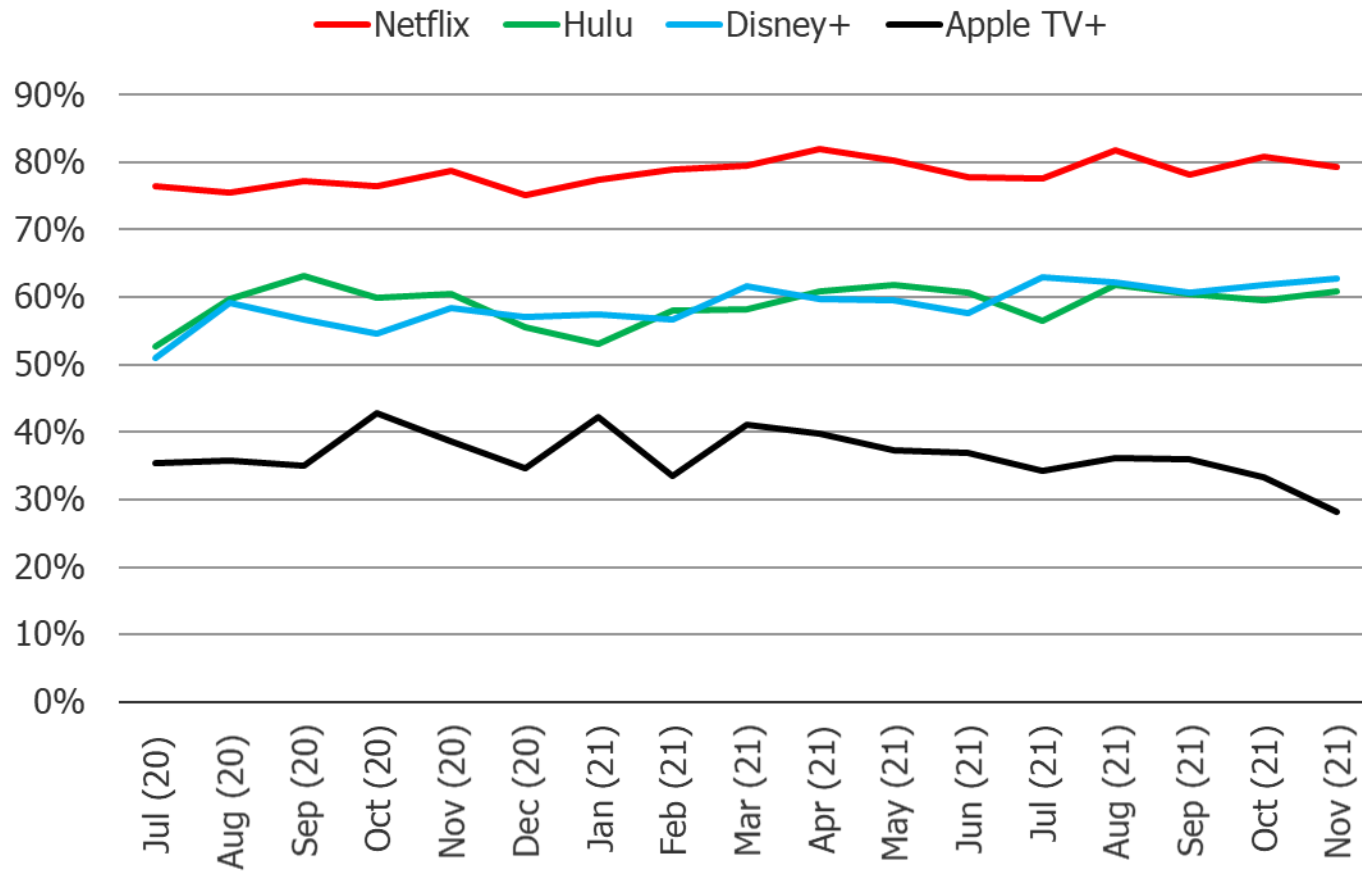
Hulu Users: Also Has An Account With...



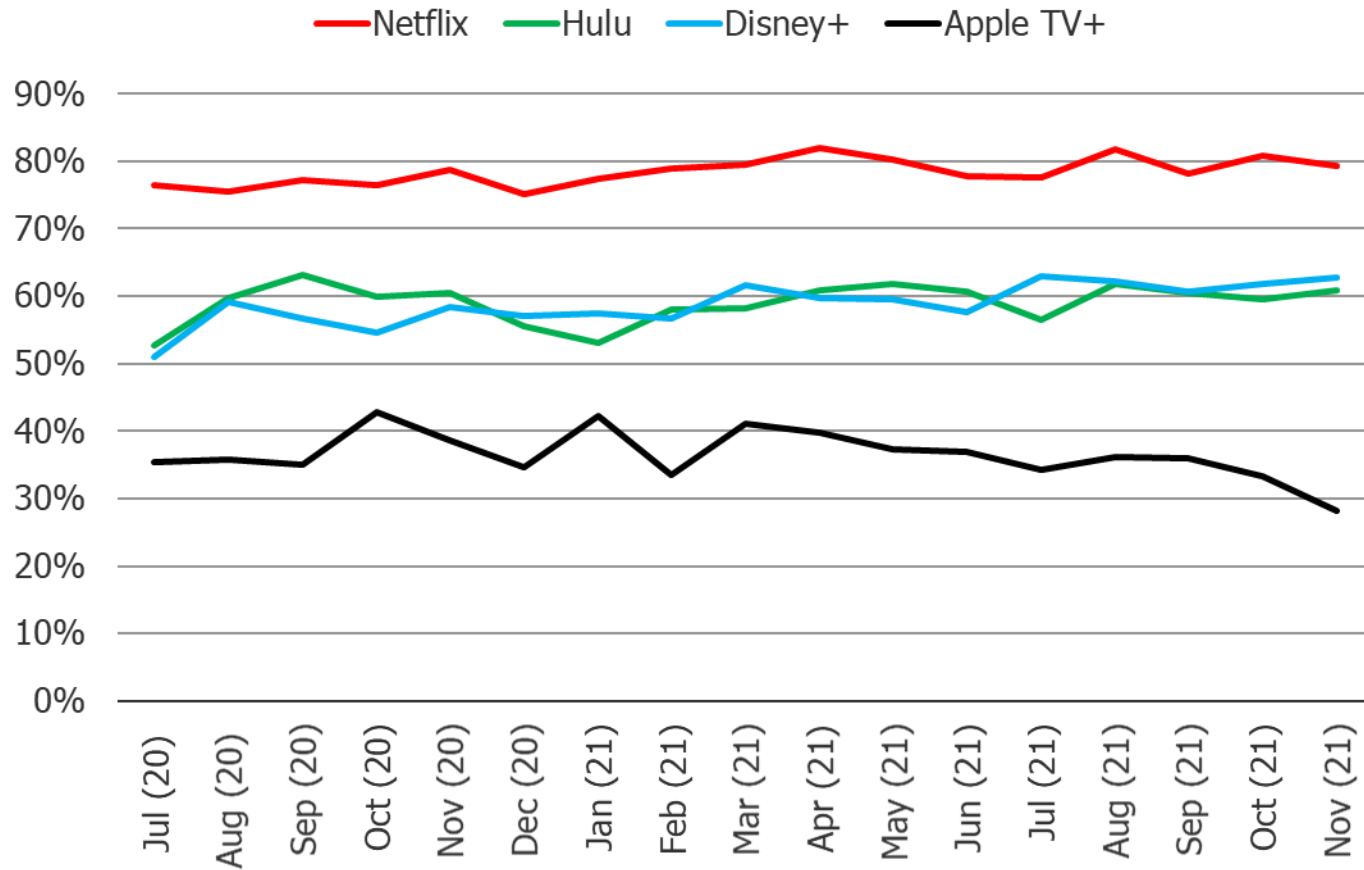
Disney+ Users: Also Has An Account With...



HBO Max Users: Also Has An Account With...



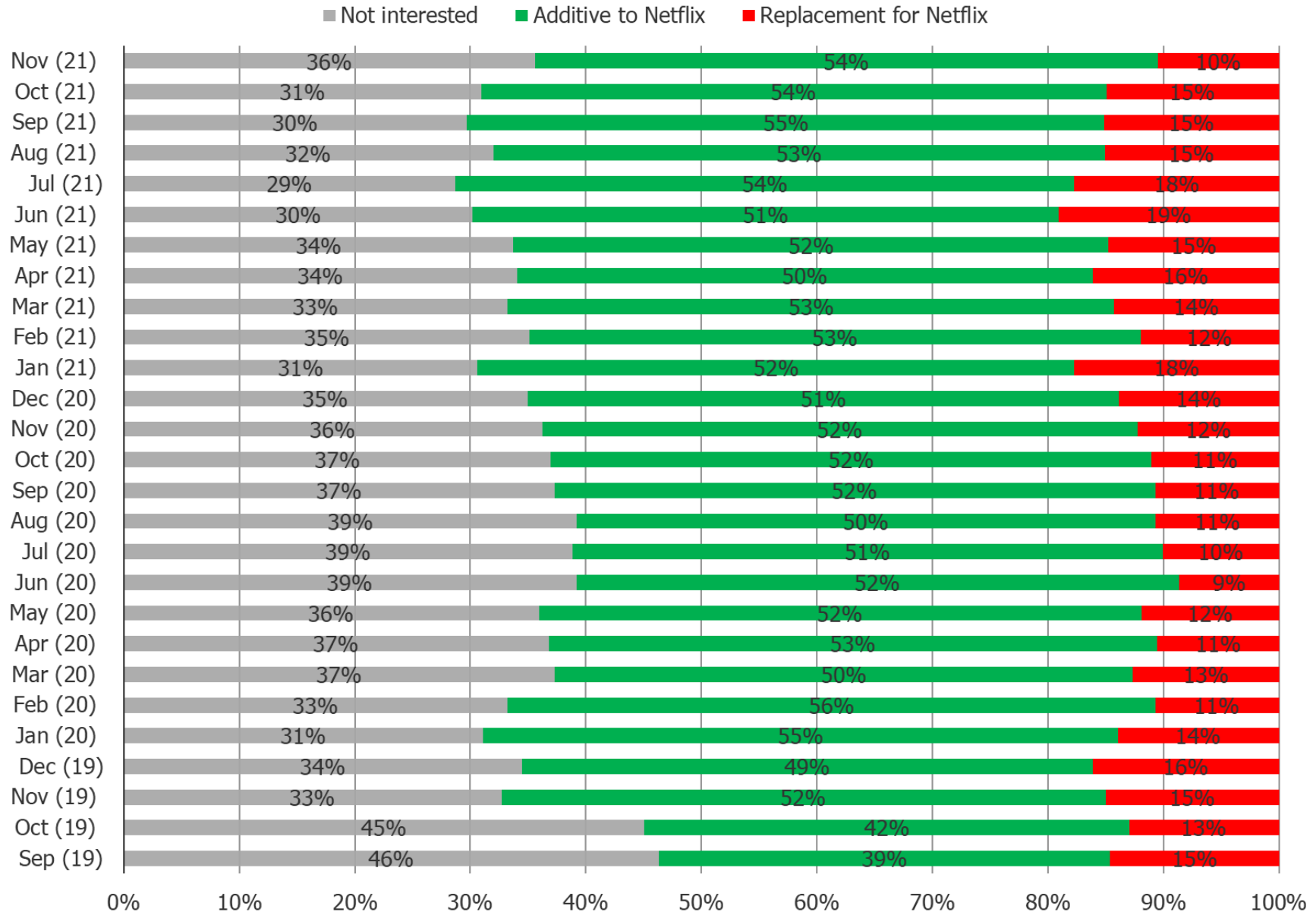
Apple TV+ Users: Also Has An Account With...



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Do you view the following to be additive or a replacement of Netflix? **Disney+**

Posed to Netflix account holders.



Do you view the following to be additive or a replacement of Netflix? HBO Max

Posed to Netflix account holders.



Do you view the following to be additive or a replacement of Netflix? **Apple TV+**

Posed to Netflix account holders.



Content Demand and Perception

Consumers have been showing increasing interest in the content on pretty much all platforms that we ask about, but feedback has been consistently most positive toward Netflix.

What are your expectations for the content that will be on Netflix?

Posed to all respondents.



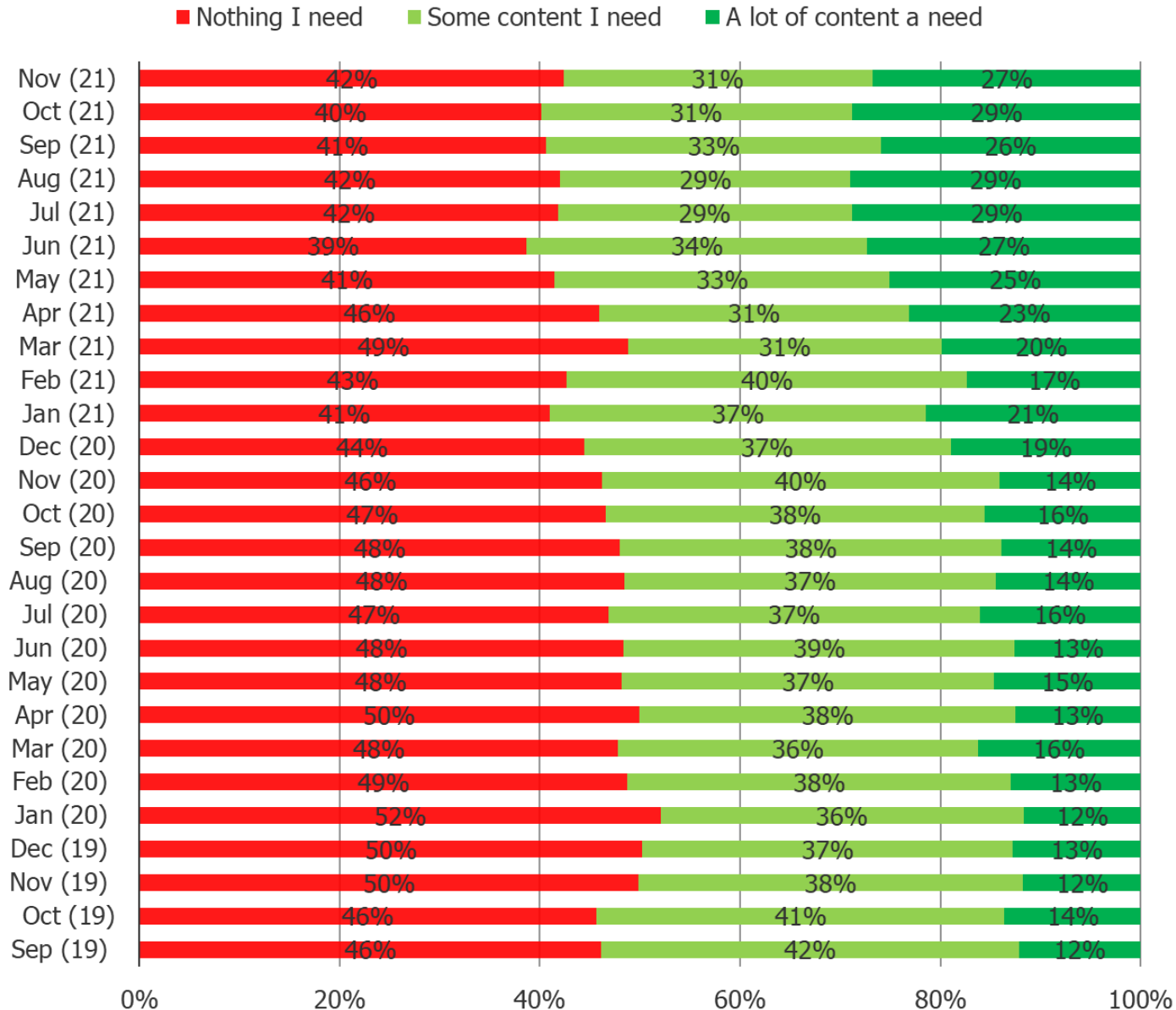
What are your expectations for the content that will be on Disney+?

Posed to all respondents.



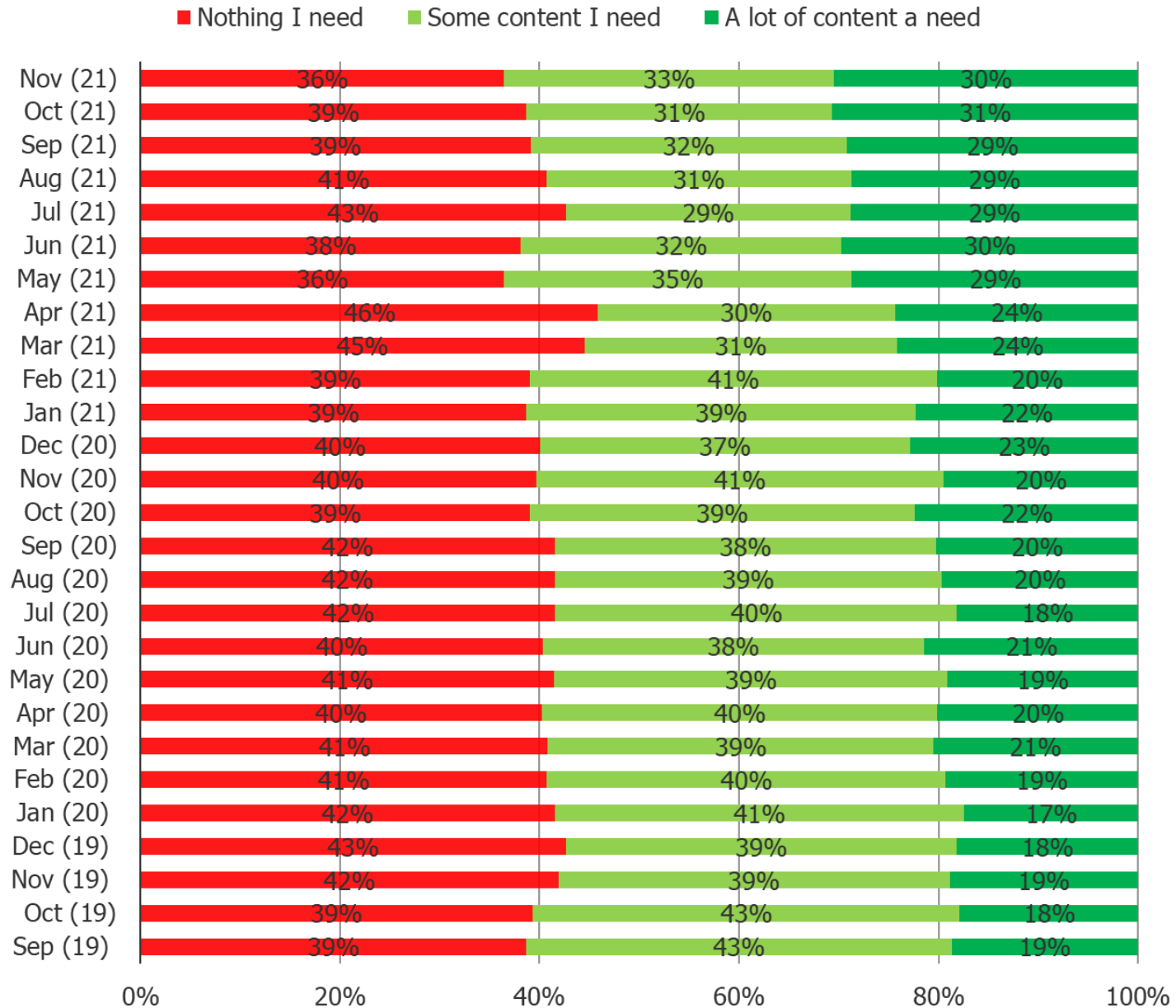
What are your expectations for the content that will be on HBO Max?

Posed to all respondents.



What are your expectations for the content that will be on Hulu?

Posed to all respondents.



What are your expectations for the content that will be on Apple TV+?

Posed to all respondents.



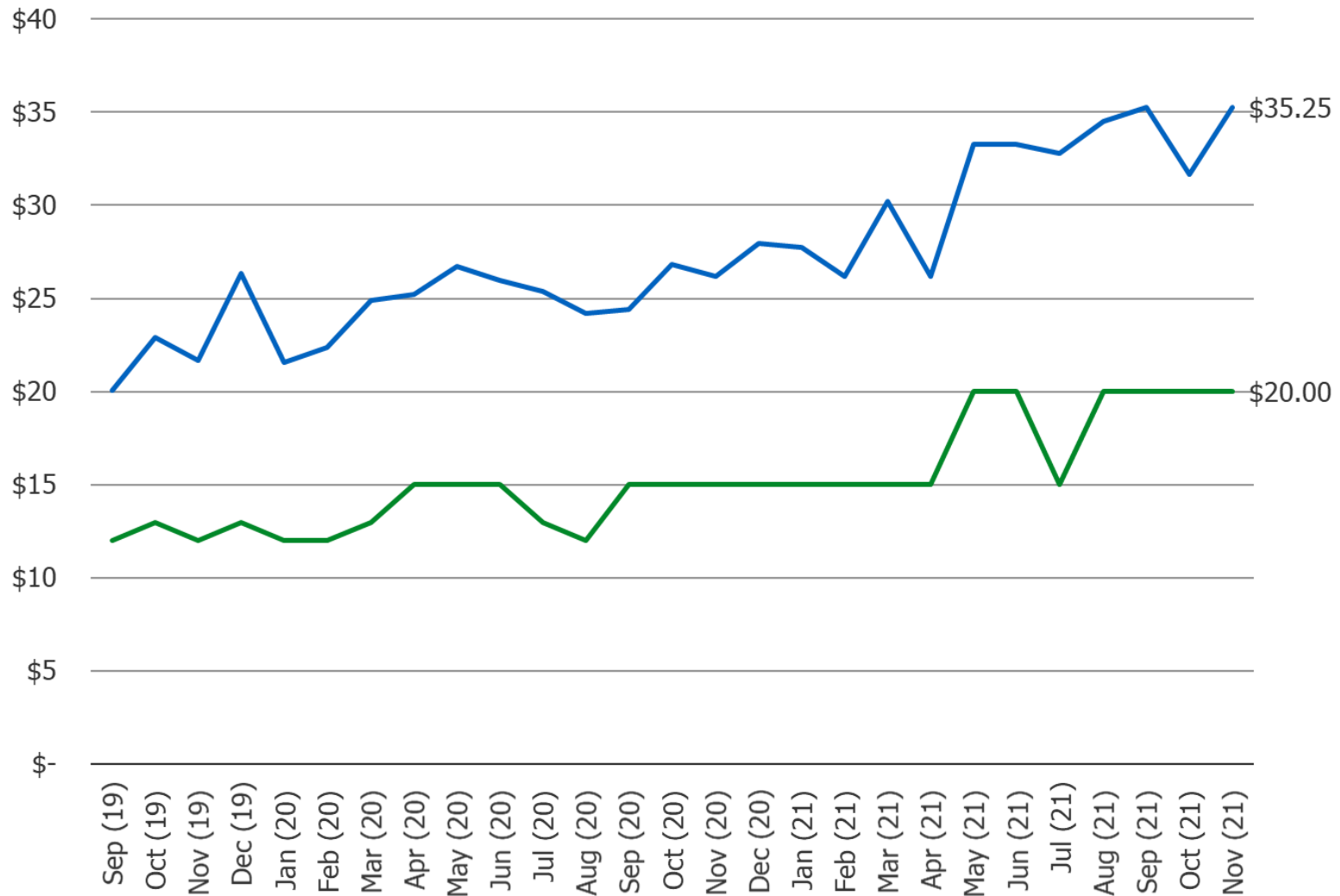
Wallet Size For Streaming and Price Sensitivity For Netflix

The average and median amount that consumers say would be appropriate to spend per month on streaming video services has increased over time. The same is true of the price sensitivity of Netflix subscribers (ie, the price that would trigger their cancellation has increased over time).

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How much do you think is appropriate to spend on streaming video services, in total, per month?

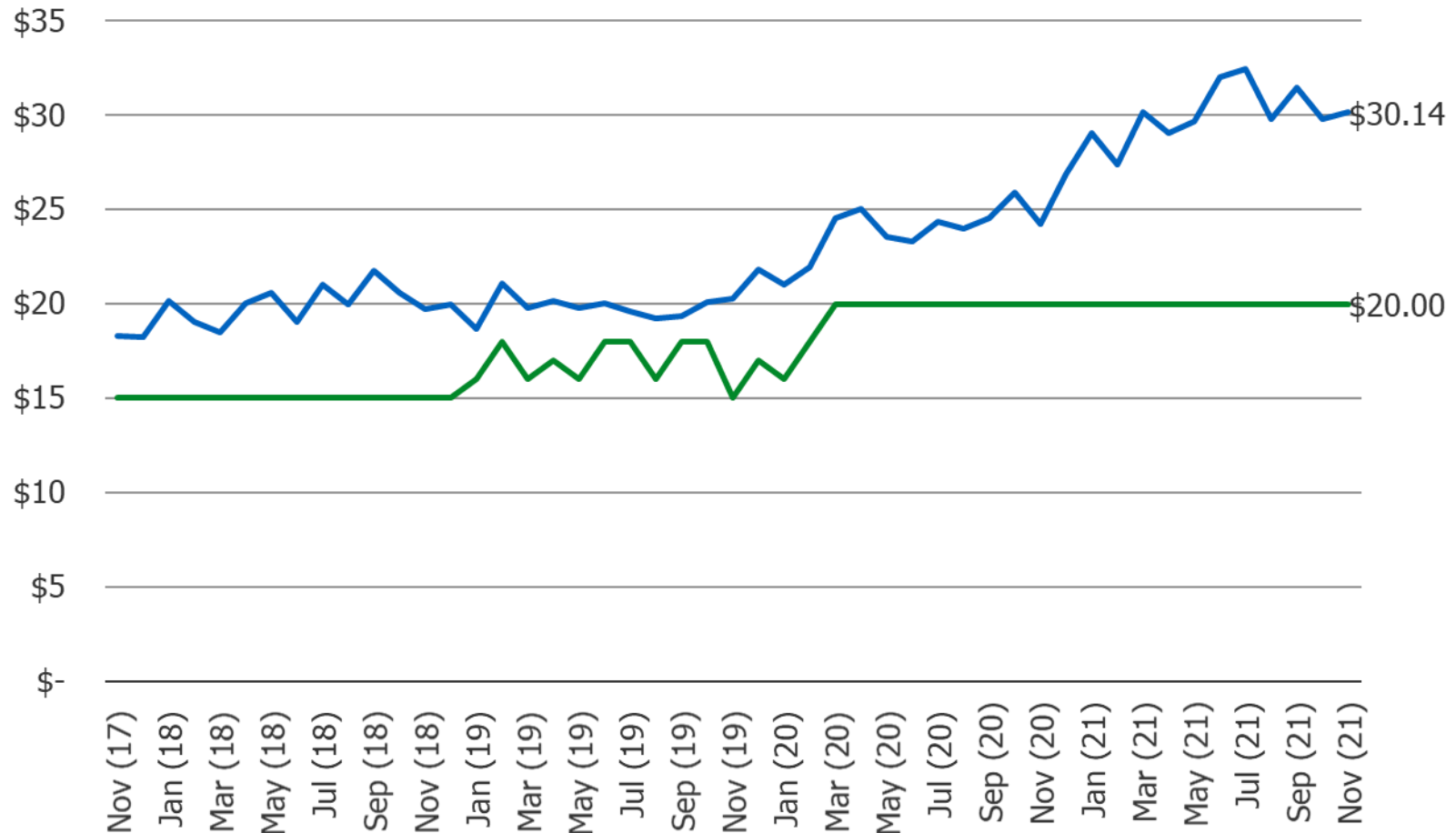
Posed to all respondents.



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At what MONTHLY price point would you decide to cancel your Netflix subscription? (IE, if Netflix continues to raise prices, what price point PER MONTH would trigger your cancellation of Netflix?)

Posed to Netflix subscribers.



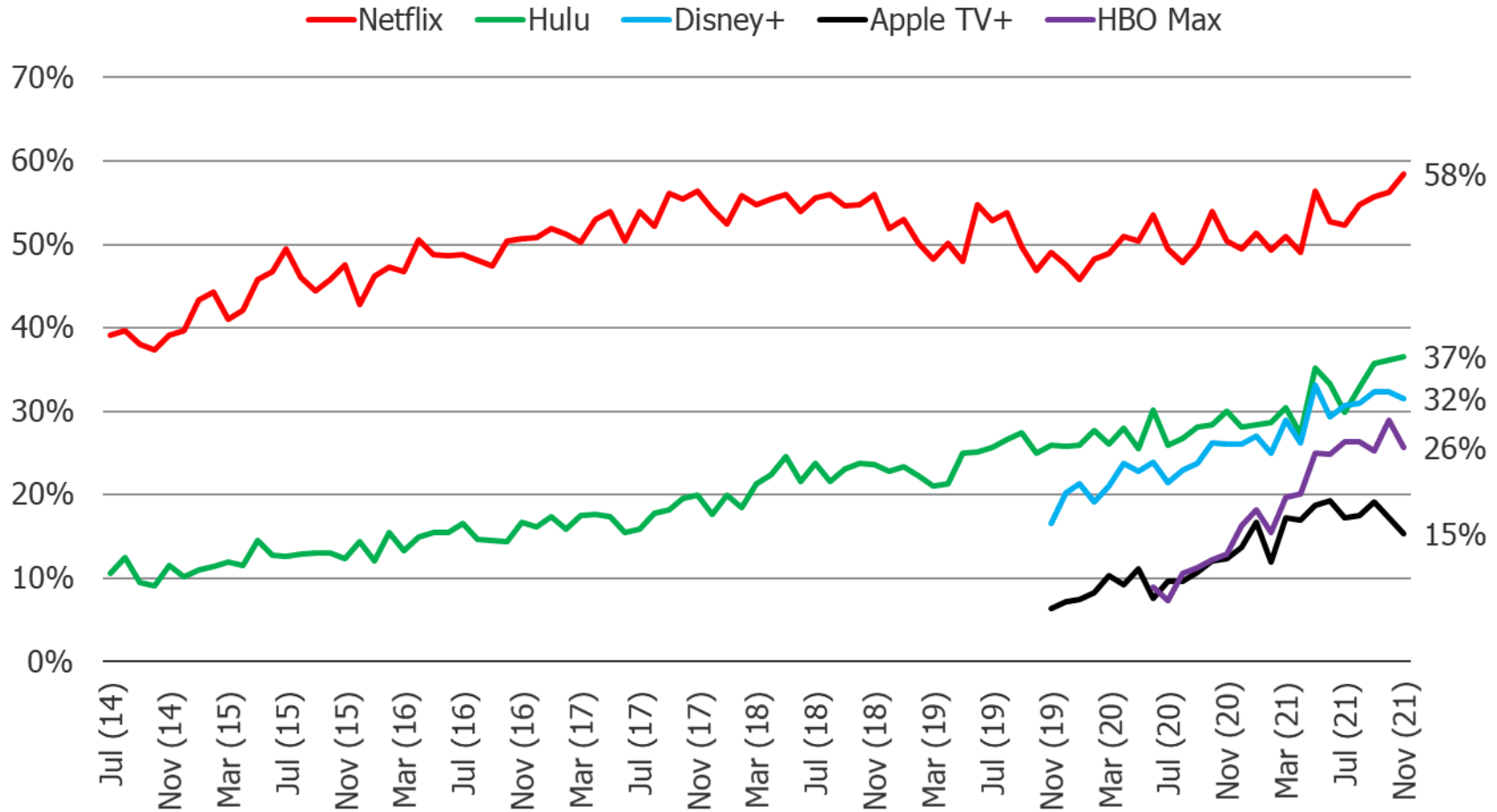
Account Holder and Likelihood of Signing Up Trackers

The percentage of respondents who self-report having accounts with each platform has increased over time. Both Netflix and Hulu currently sit at series highs.

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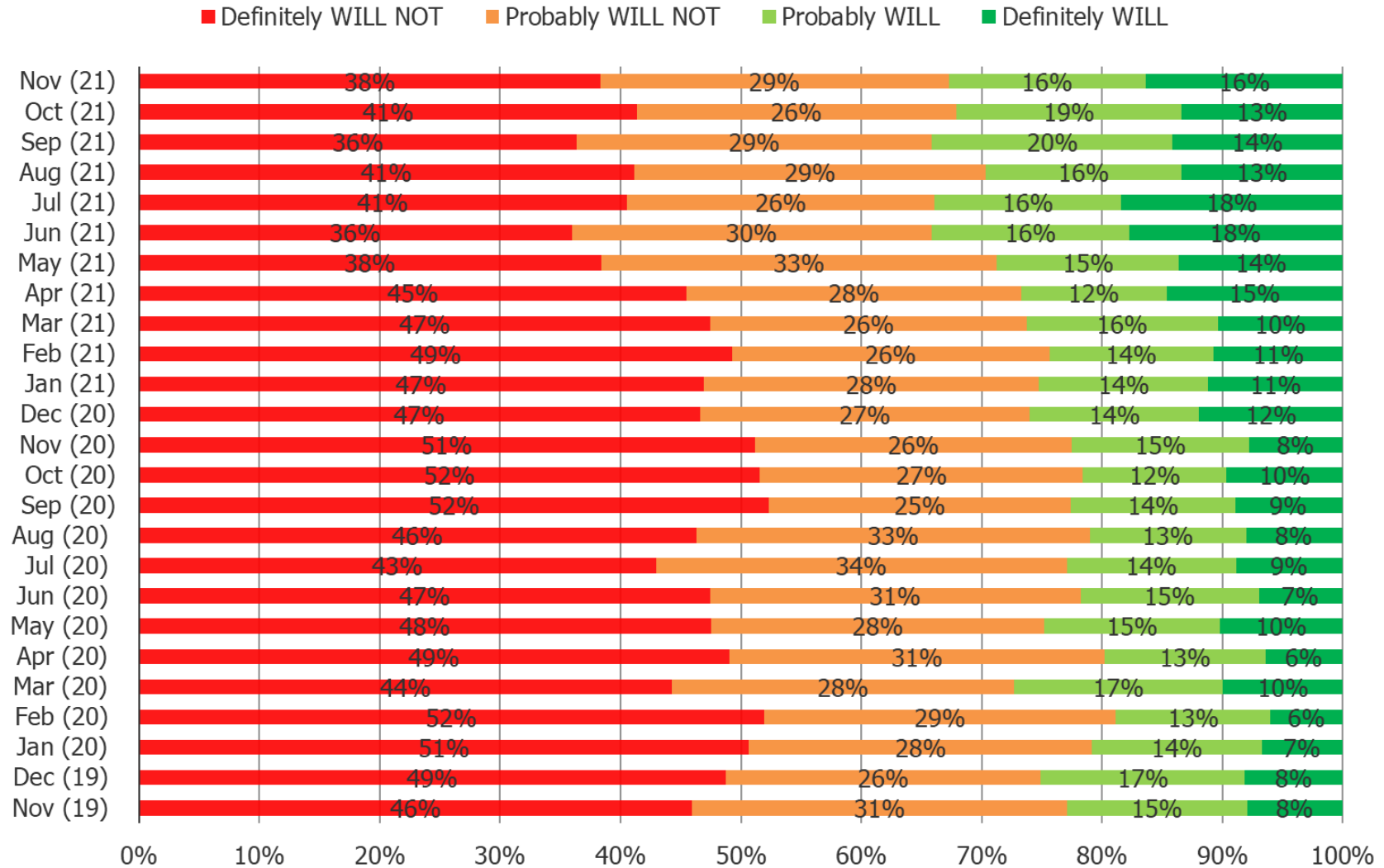
Do you currently have an account with any of the following streaming services?

Posed to all respondents.



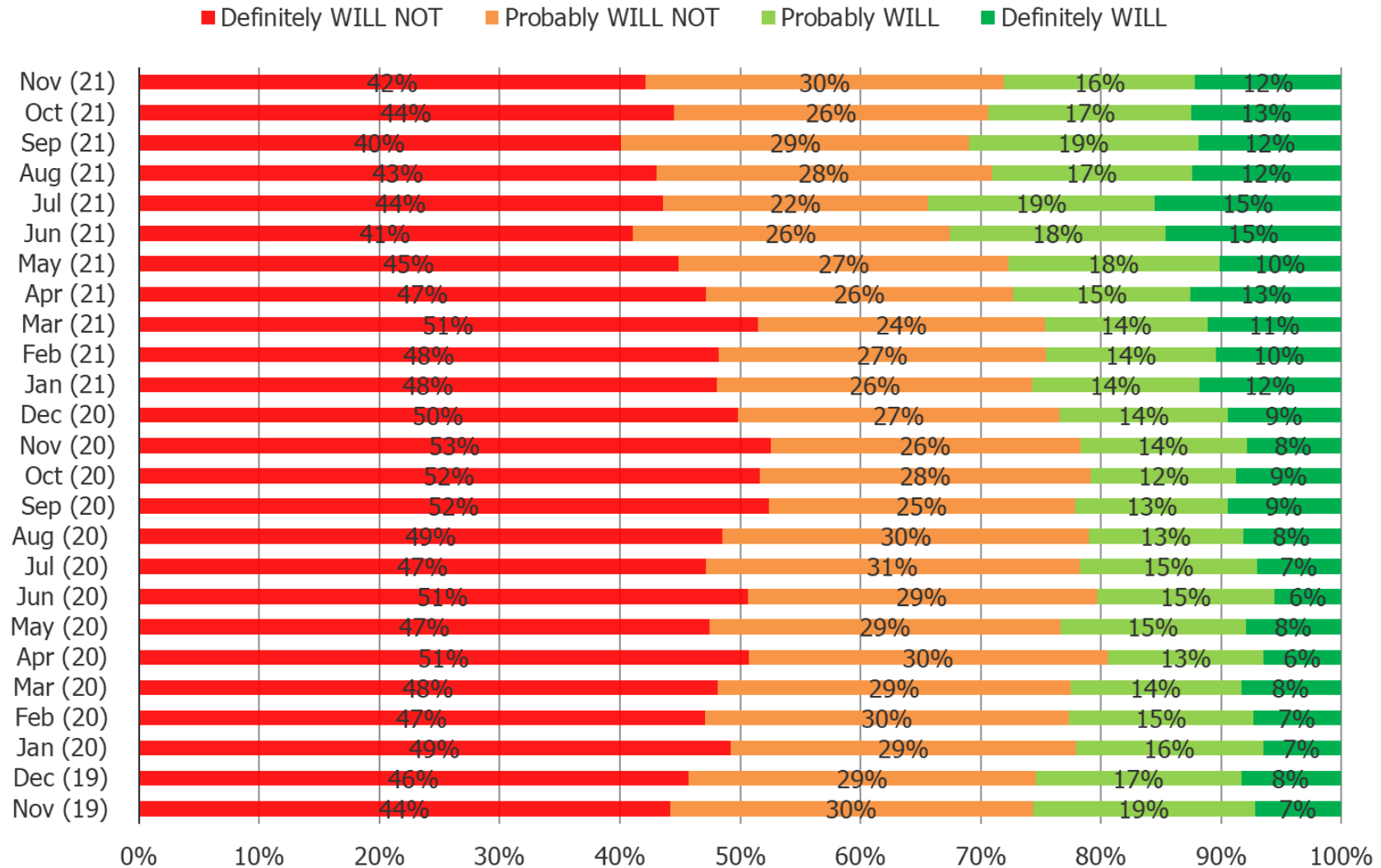
How likely are you to sign up for Netflix in the next month?

Posed to respondents who said they currently do not have an account with Netflix.



How likely are you to sign up for Disney+ in the next month?

Posed to respondents who said they currently do not have an account with Disney+.



How likely are you to sign up for Apple TV+ in the next month?

Posed to respondents who said they currently do not have an account with Apple TV+.

