

BESPOKE SURVEYS

Streaming Video Domestic, Vol 36

1000+ US Consumers Balanced to Census

April 2022



CHECK BREAKDOWN:

TREND CHECKS

STREAMING SECTOR TRENDS – CONSISTENT Q/Q

- The number of streaming video platforms and the amount consumers feel is appropriate to pay monthly across all streaming platforms remains at series highs, roughly consistent with readings last quarter.
- Streaming remains solidly the preferred method among consumers for watching video.

NETFLIX PRICING SENTIMENT

Over time, Netflix subscribers have grown less satisfied with Netflix’s pricing. It is still seen as a good value, but relatively less so compared to historical readings.

NETFLIX SUBSCRIBER TRENDS

The percentage of consumers who say they are Netflix subscribers sits at series highs in our survey, but the % of Netflix subscribers who said they are contemplating cancelling increased q/q and also sits at series highs.

COMPETITIVE DYNAMICS

Netflix subscribers are unlikely to view peers as a replacement and have been decreasingly likely over time to view peers as replacement. Furthermore, Netflix remains the platform that the highest percentage of consumers feel has upcoming content they will want to watch.

COMPETITIVE DYNAMICS

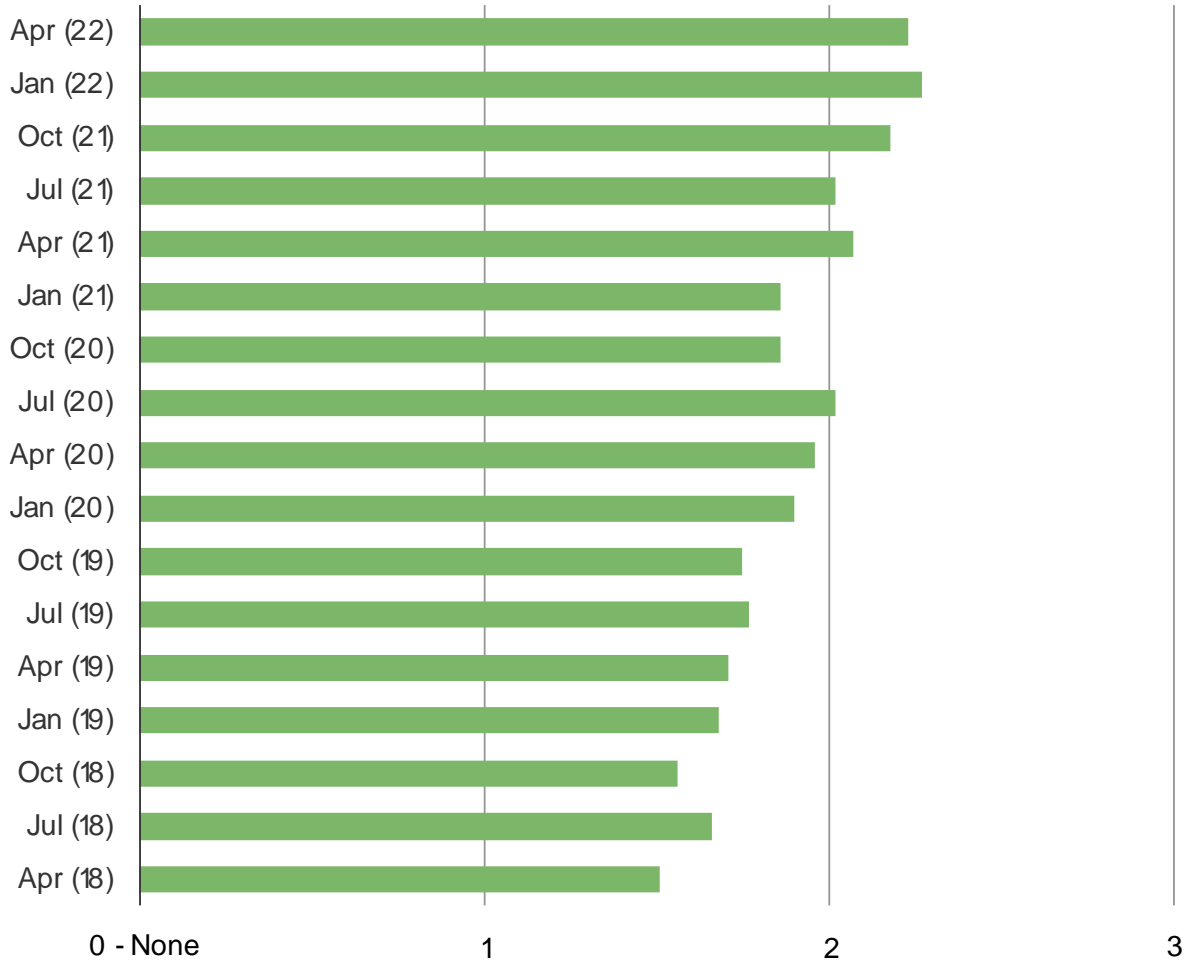
Netflix subscriber engagement with the platform is roughly the same q/q with especially positive feedback around movies and originals in this survey volume.

Streaming Wars

STREAMING SECTOR DYNAMICS

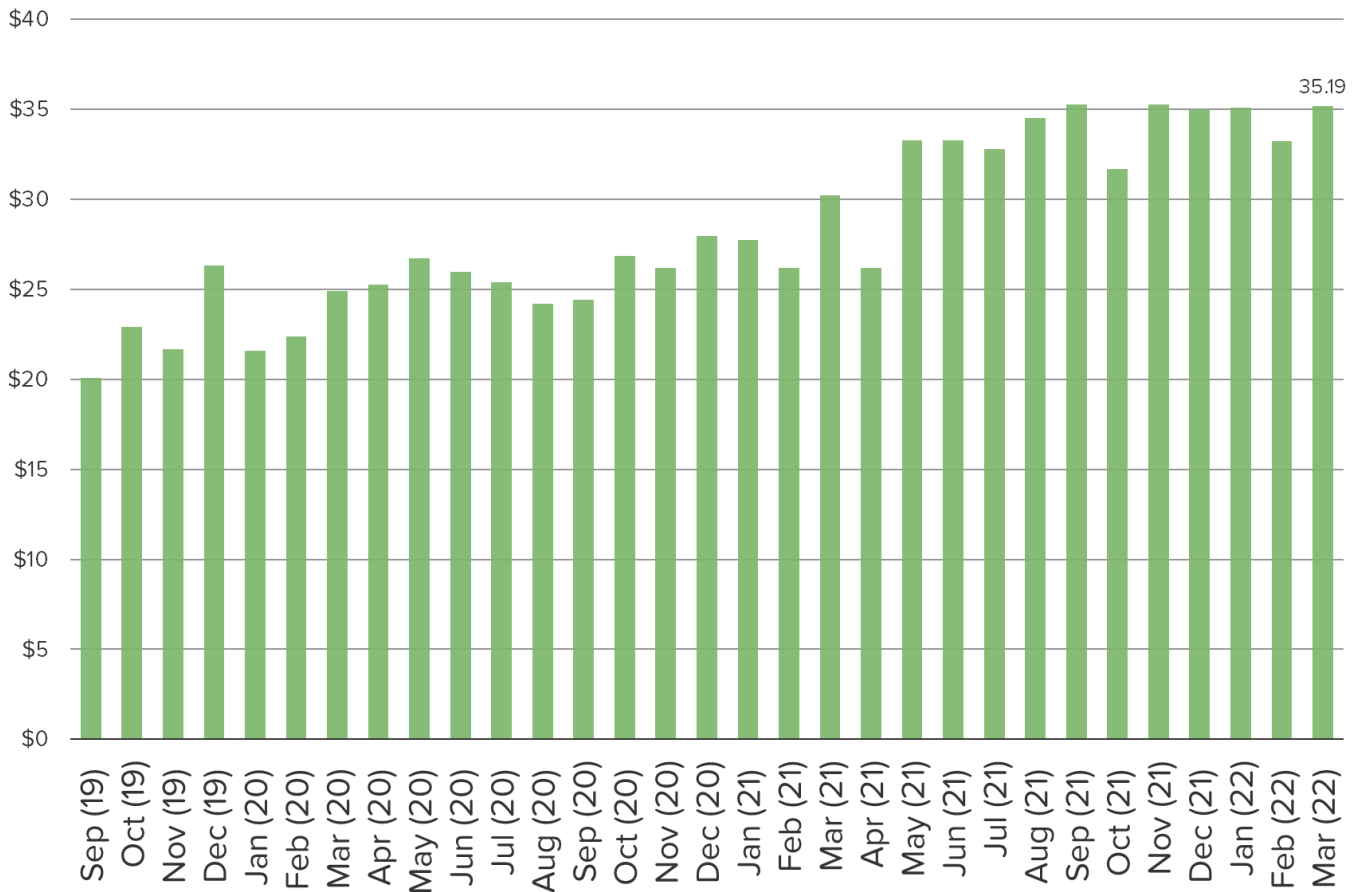
HOW MANY STREAMING VIDEO SERVICES DO YOU THINK IS THE RIGHT NUMBER TO BE PAYING FOR AT THE SAME TIME?

Posed to all respondents.



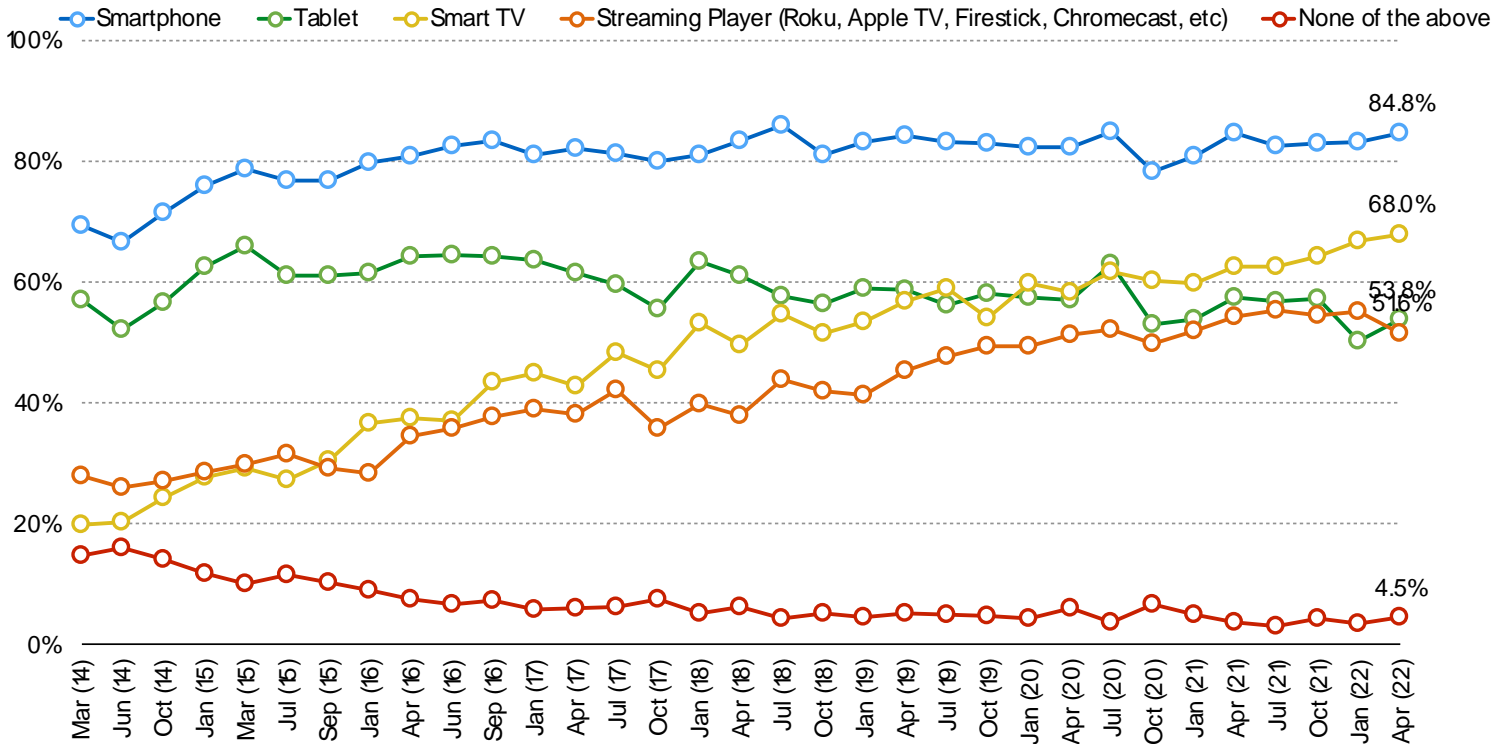
HOW MUCH DO YOU THINK IS APPROPRIATE TO SPEND ON STREAMING VIDEO SERVICES, IN TOTAL, PER MONTH?

Posed to all respondents.



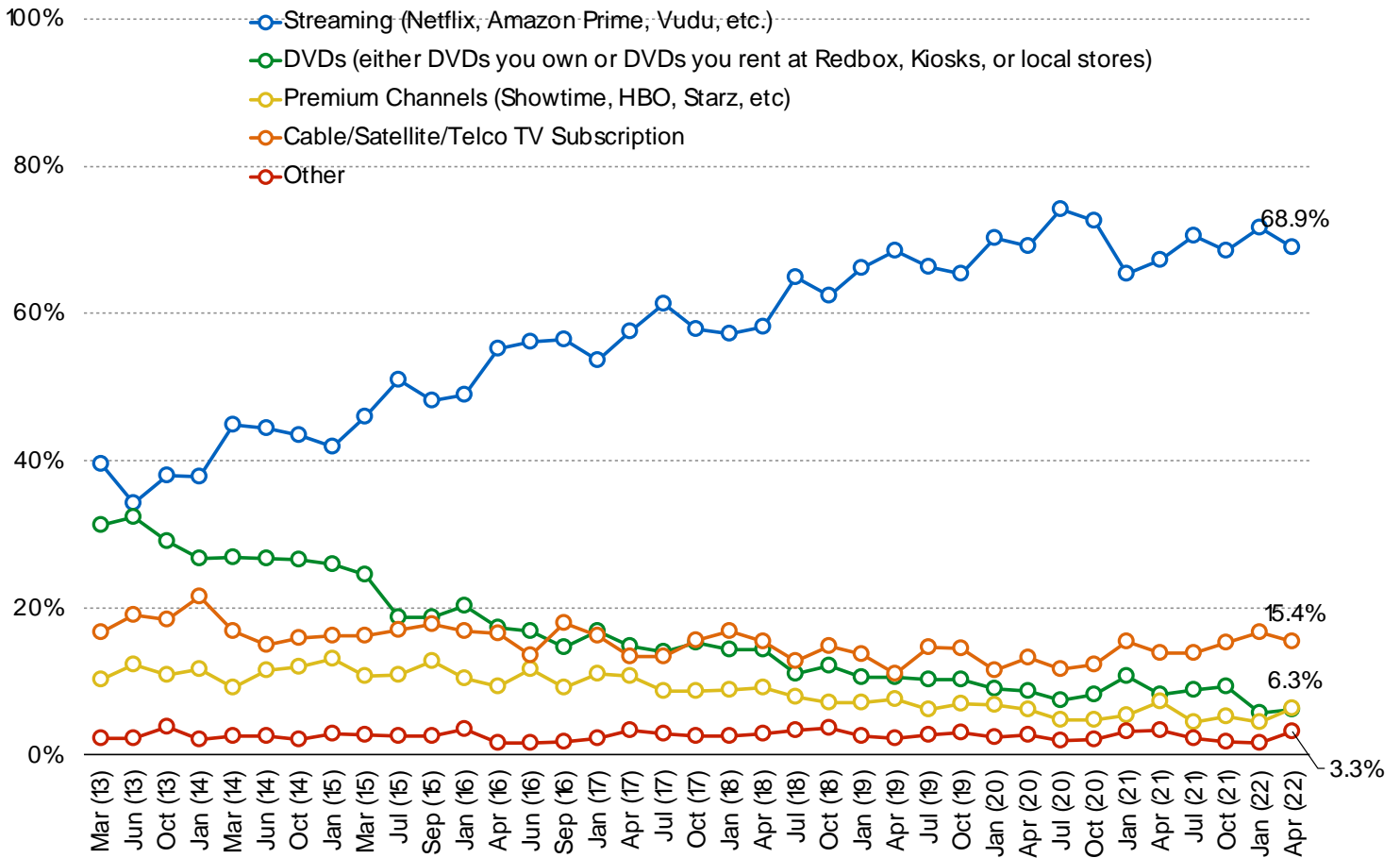
INTERNET CONNECTED DEVICES OWNED BY RESPONDENTS

This question was posed to the target audience.



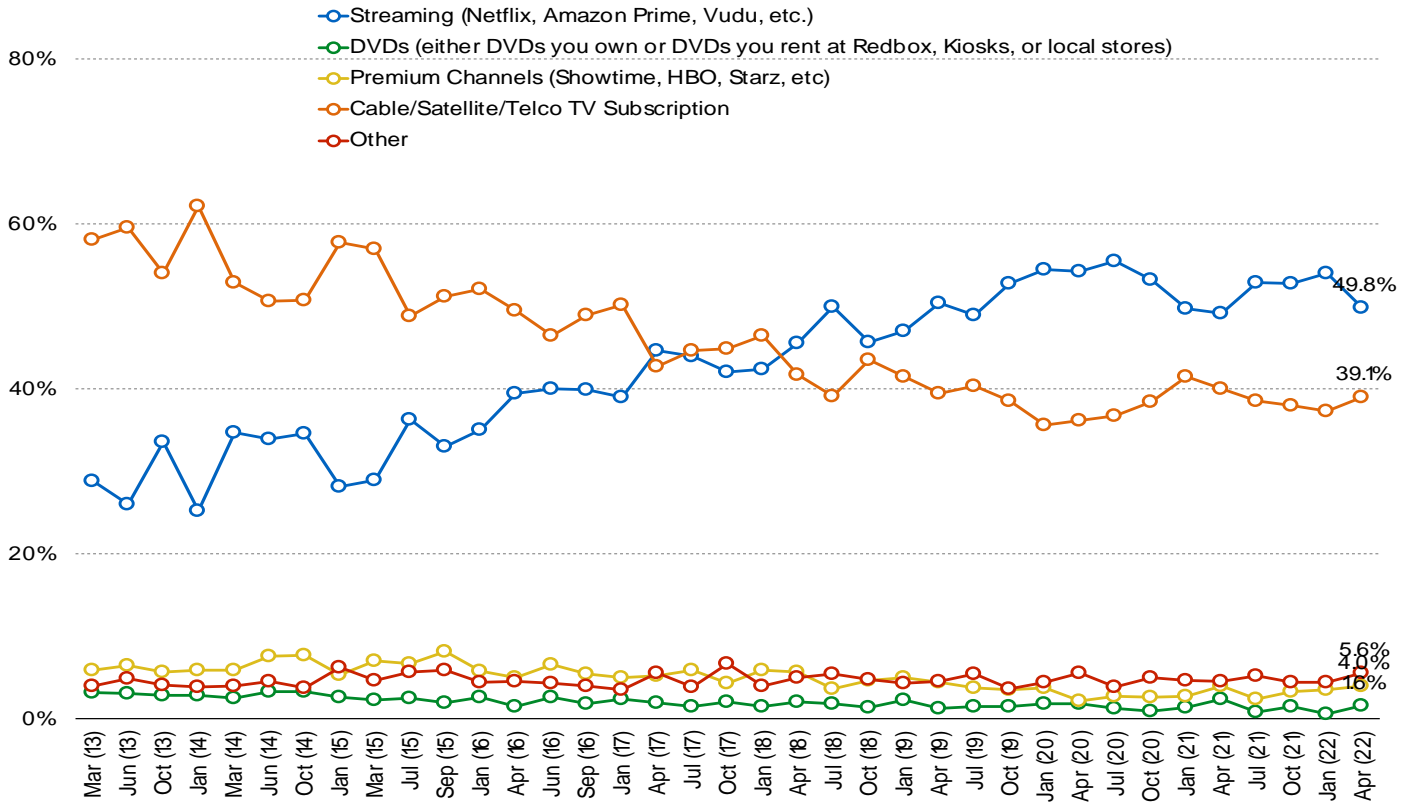
PREFERRED METHOD FOR WATCHING MOVIES

This question was posed to the target audience.



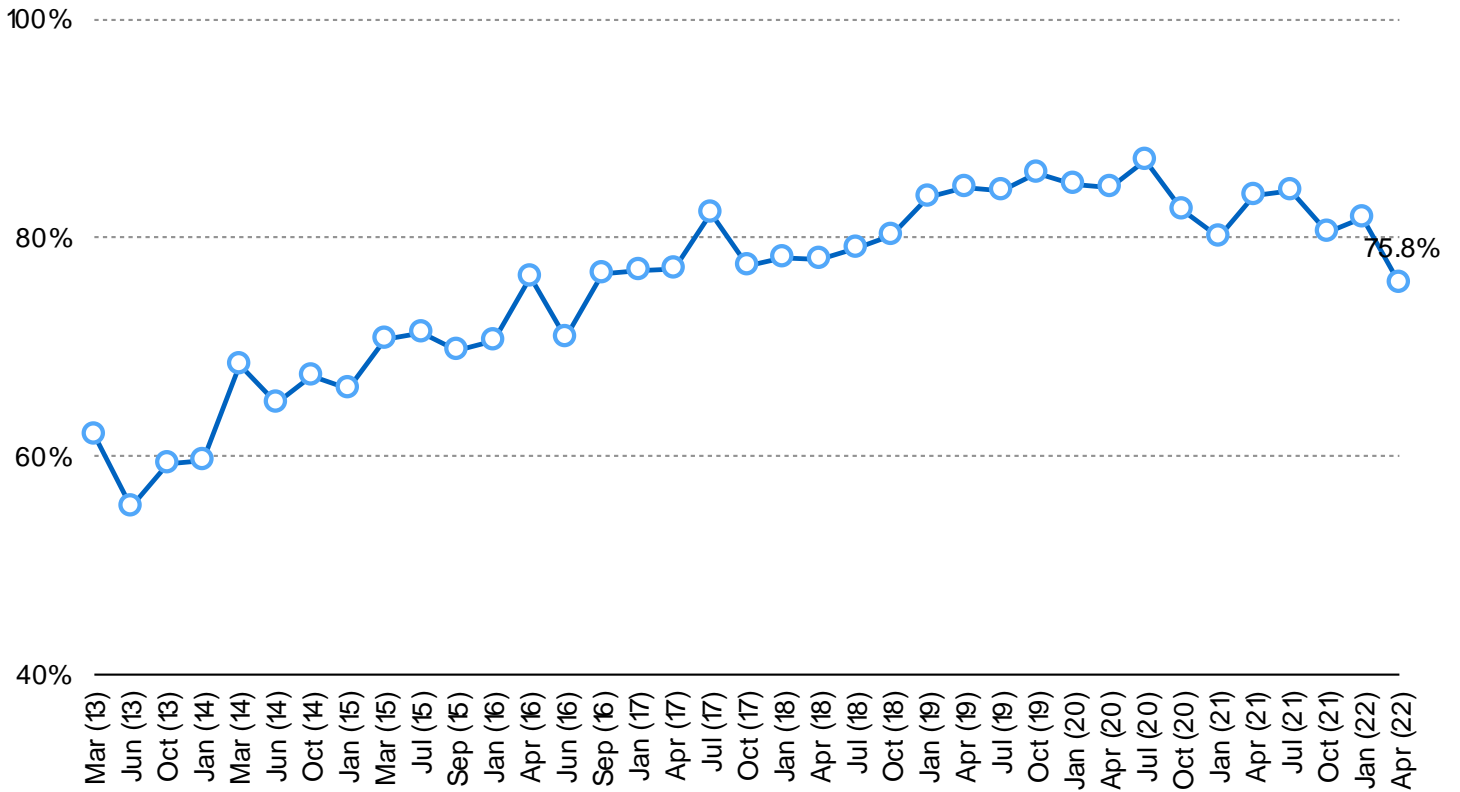
PREFERRED METHOD FOR WATCHING TELEVISION SHOWS

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.

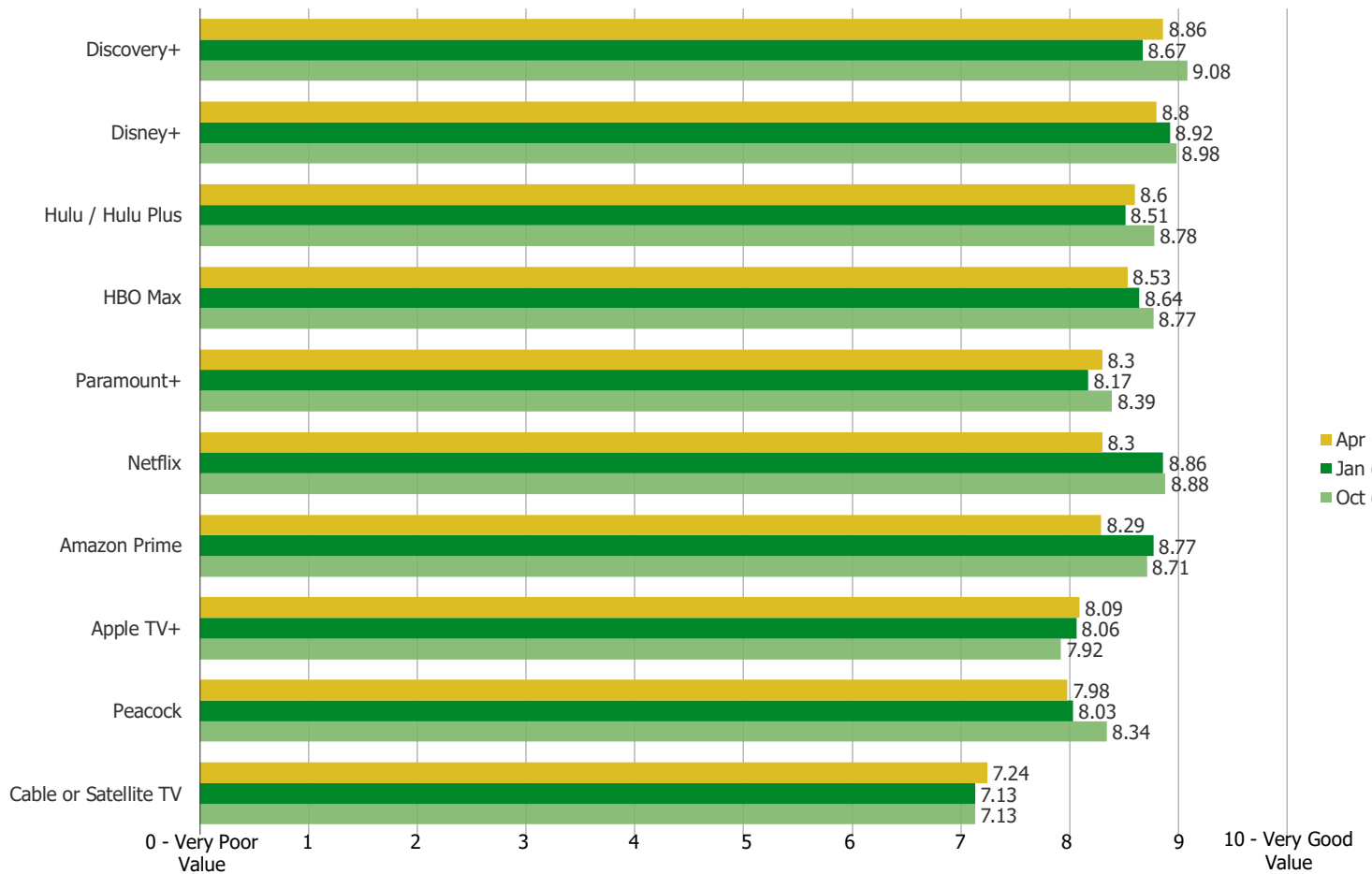


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STREAMING PLATFORMS – COMPETITIVE DYNAMICS

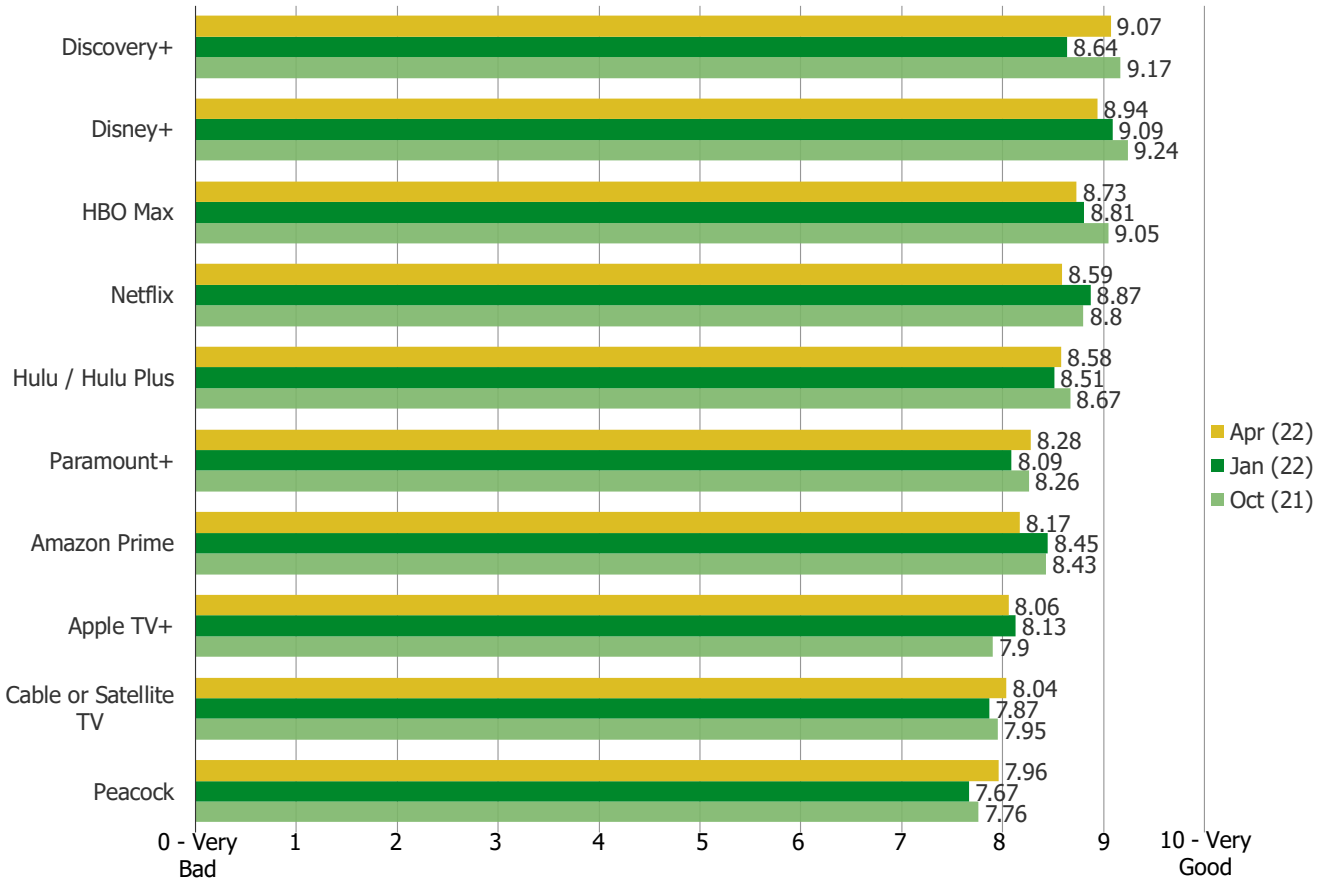
HOW WOULD YOU RATE THE VALUE THIS SERVICE OFFERS RELATIVE TO WHAT IT COSTS?

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:

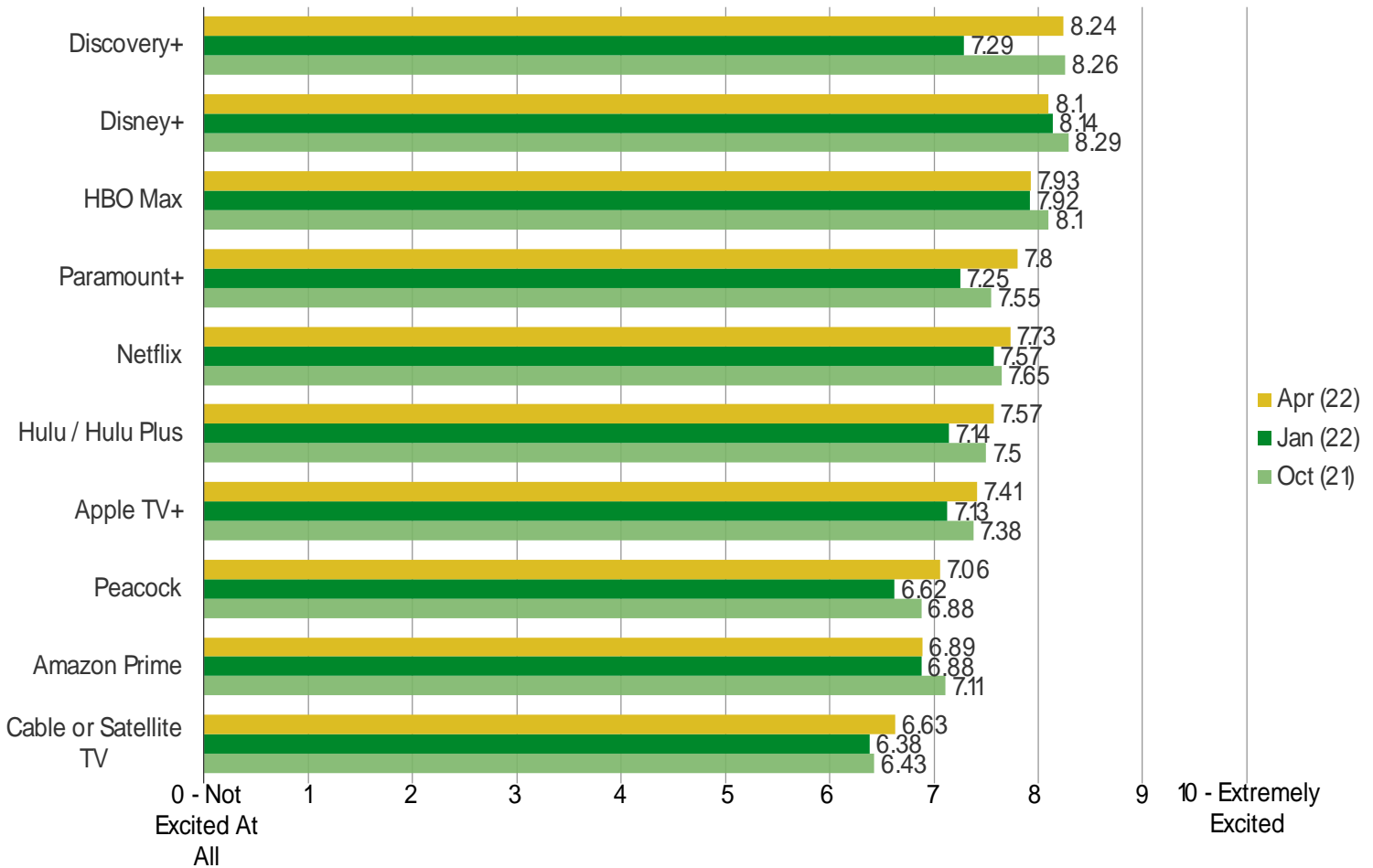
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



	N=
Netflix	512
Hulu / Hulu Plus	307
HBO Max	232
Amazon Prime	460
Apple TV+	102
Cable or Satellite TV	330
Disney+	262
Peacock	218
Discovery+	84
Paramount+	145

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

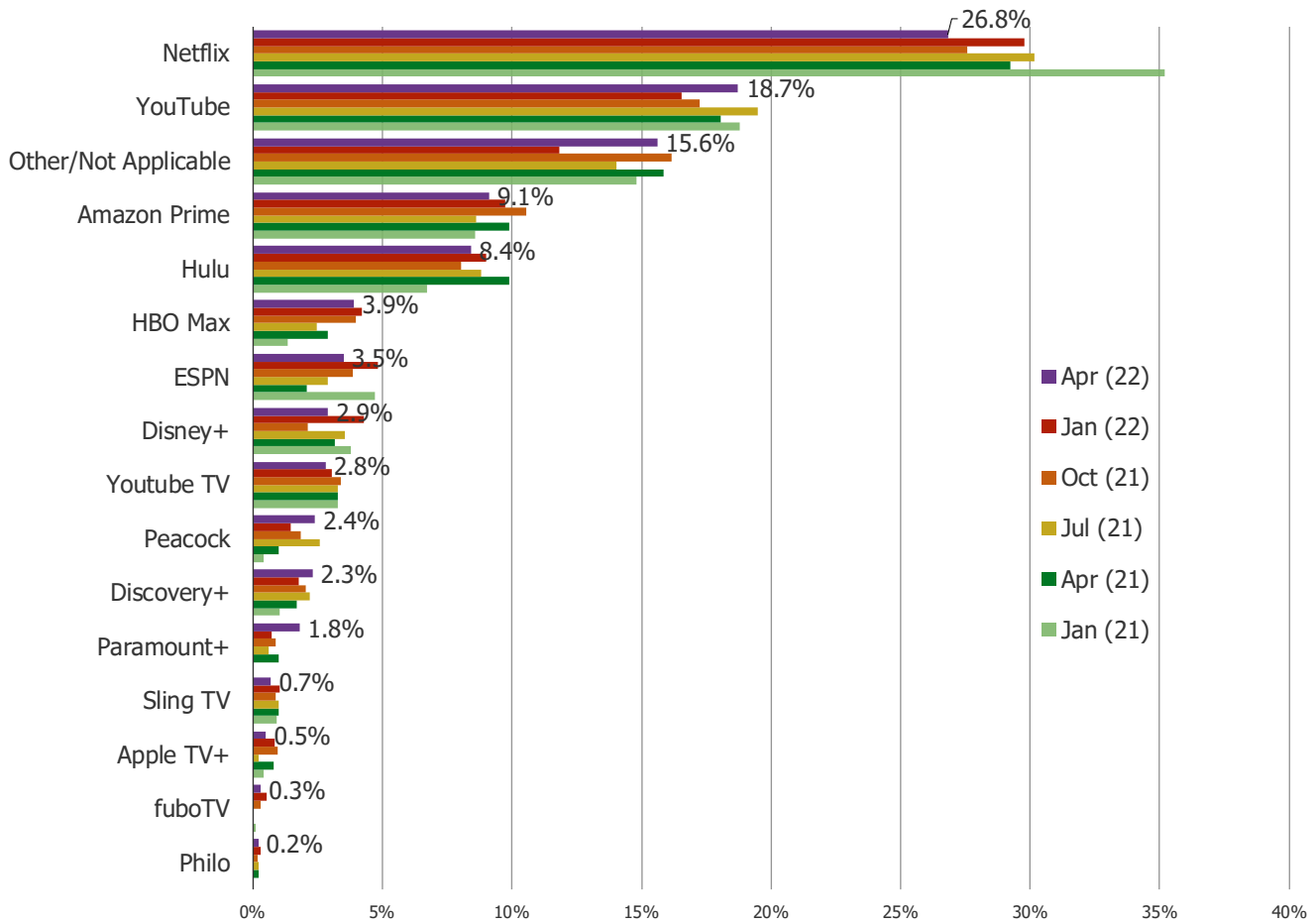
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



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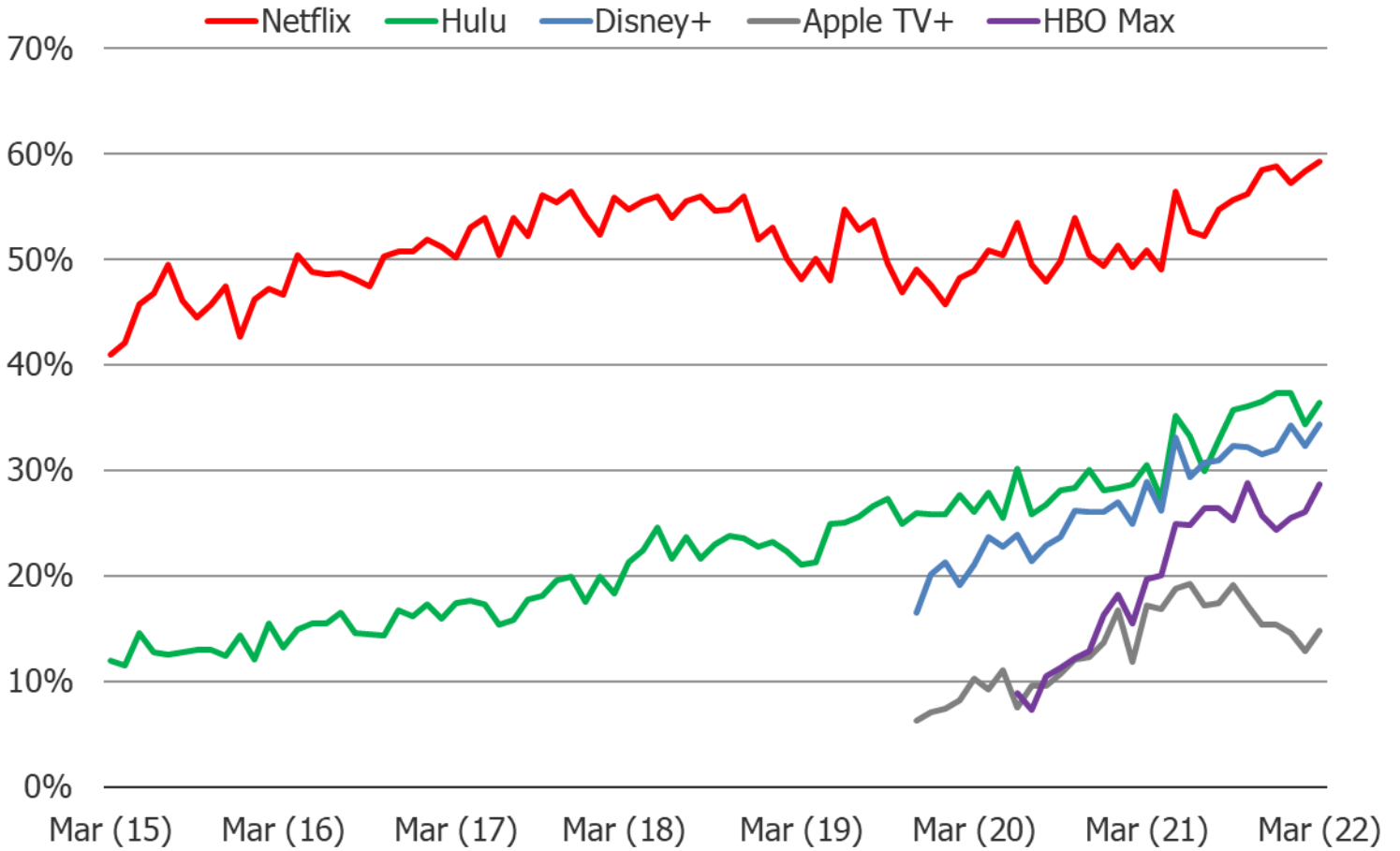
WHICH NETWORKS/SERVICES DO RESPONDENTS WATCH MOST OFTEN?

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).



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

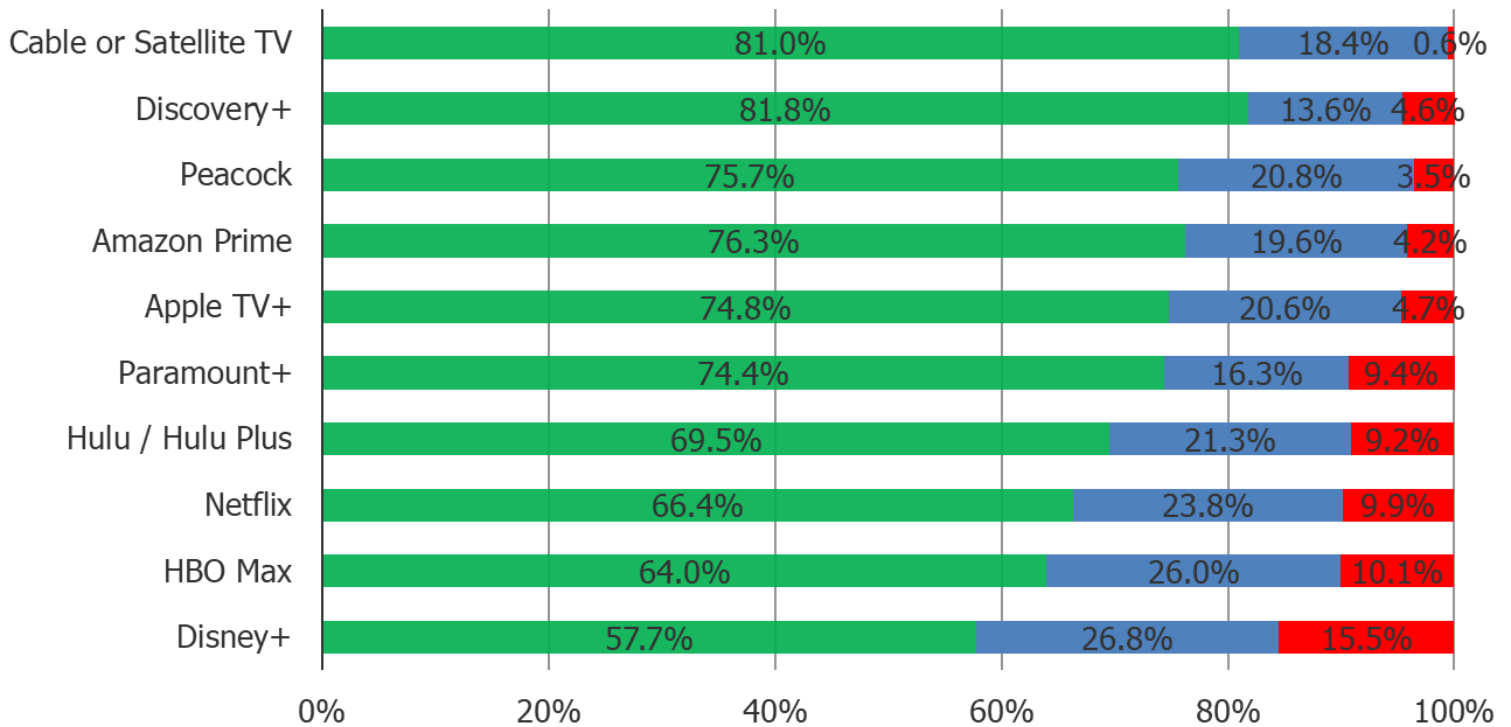
Posed to all respondents.



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.

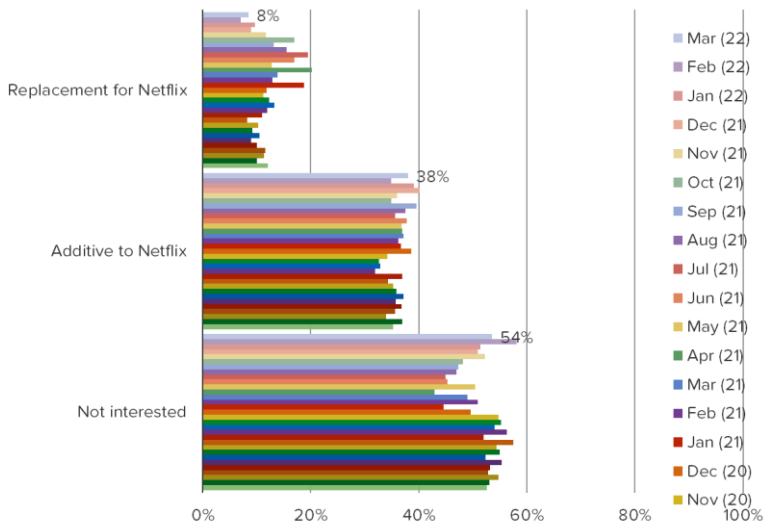
- I pay for this service myself
- I live with someone who pays for this service
- I access this service via someone's log-in who I don't live with



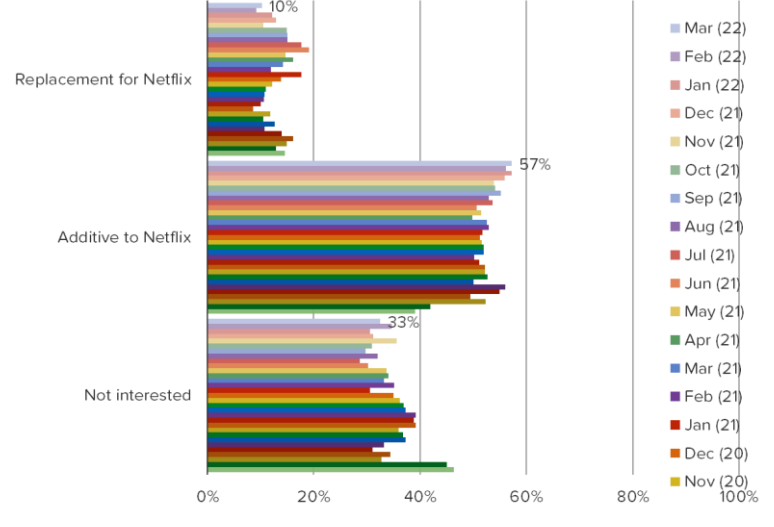
WOULD YOU VIEW THE FOLLOWING TO BE ADDITIVE OR A REPLACEMENT OF NETFLIX?

Posed to Netflix subscribers.

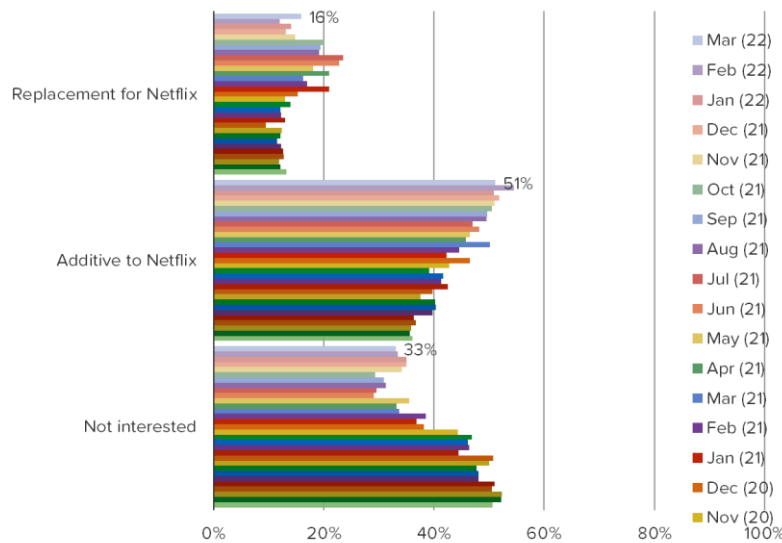
Apple TV+



Disney+



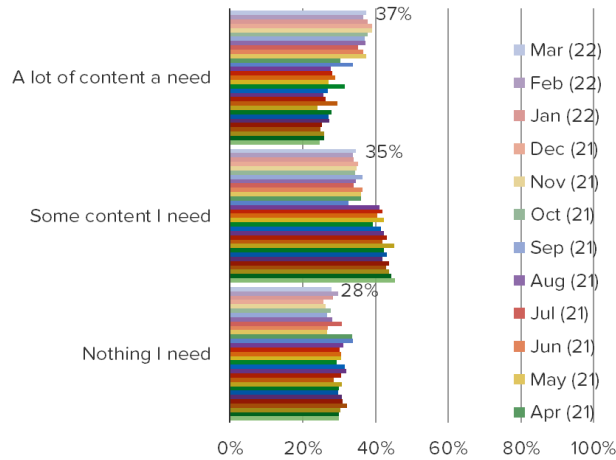
HBO Max



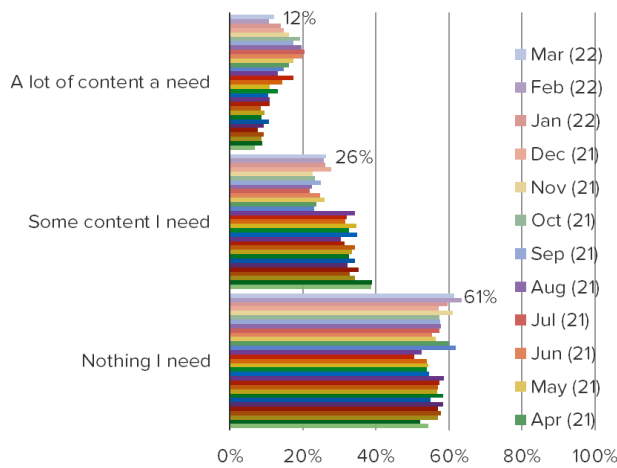
WHAT ARE YOUR EXPECTATIONS FOR THE CONTENT THAT WILL BE ON EACH OF THESE PLATFORMS GOING FORWARD?

Posed to all respondents.

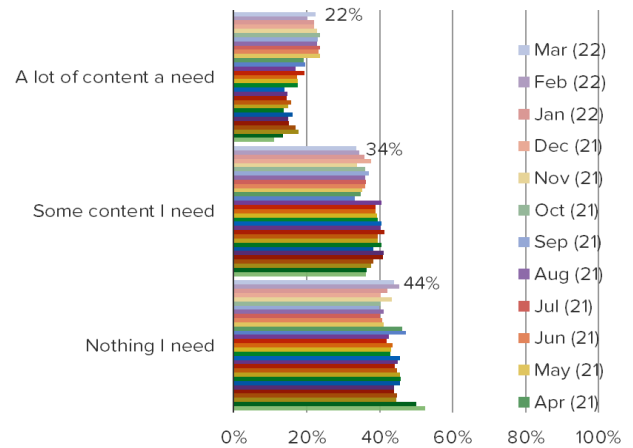
Netflix



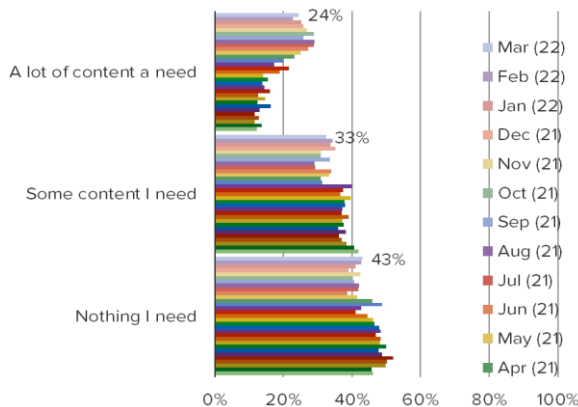
Apple TV+



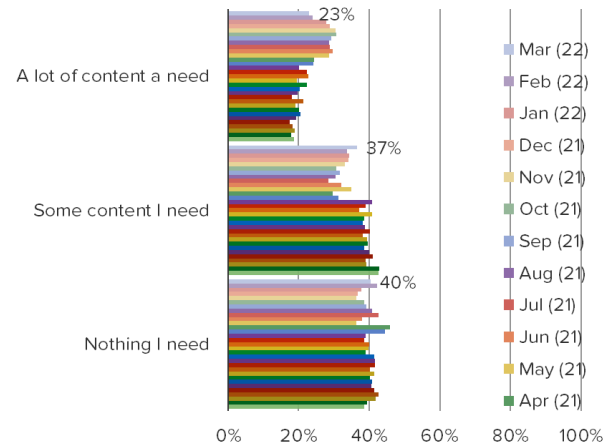
Disney+



HBO Max

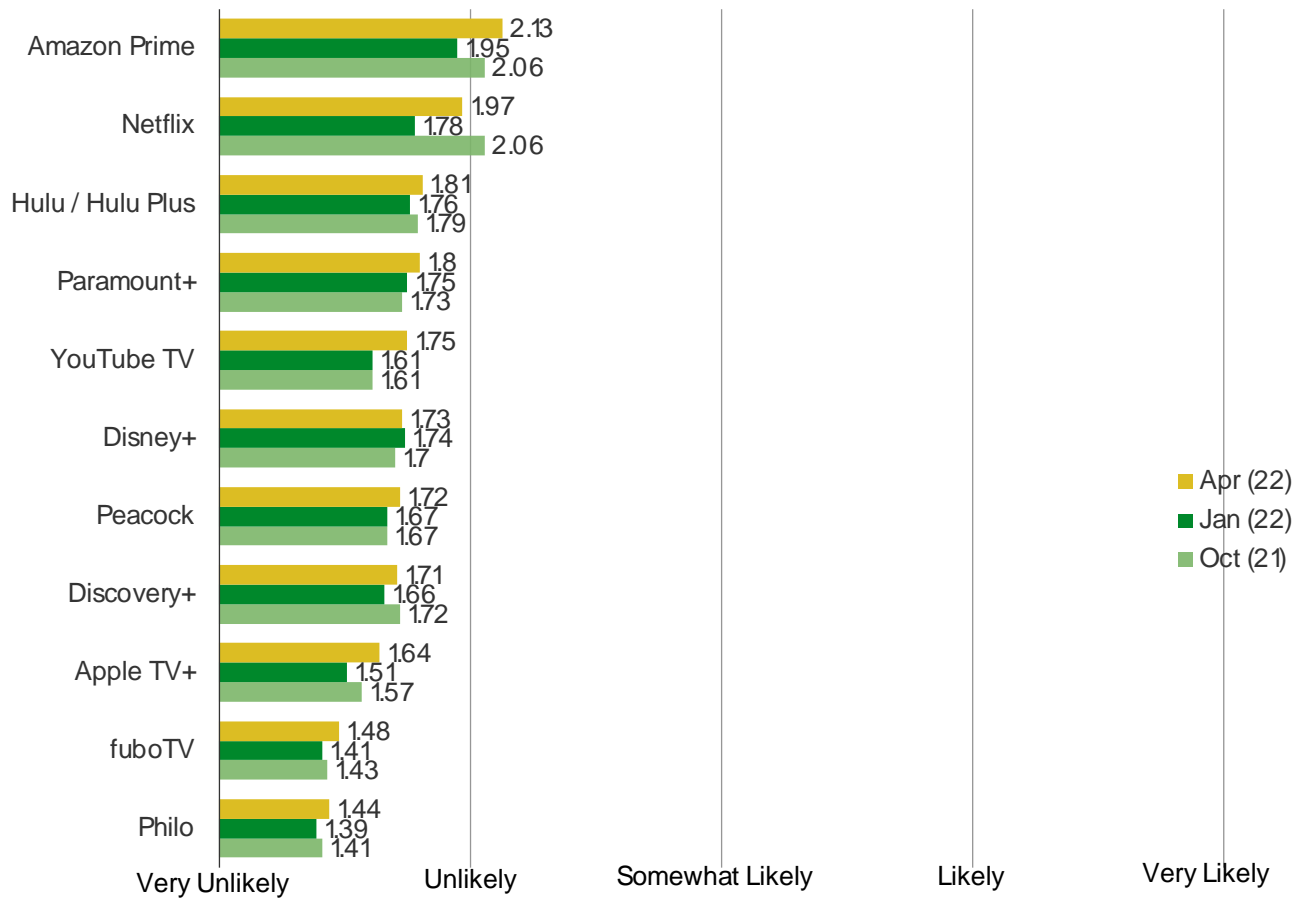


Hulu



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.

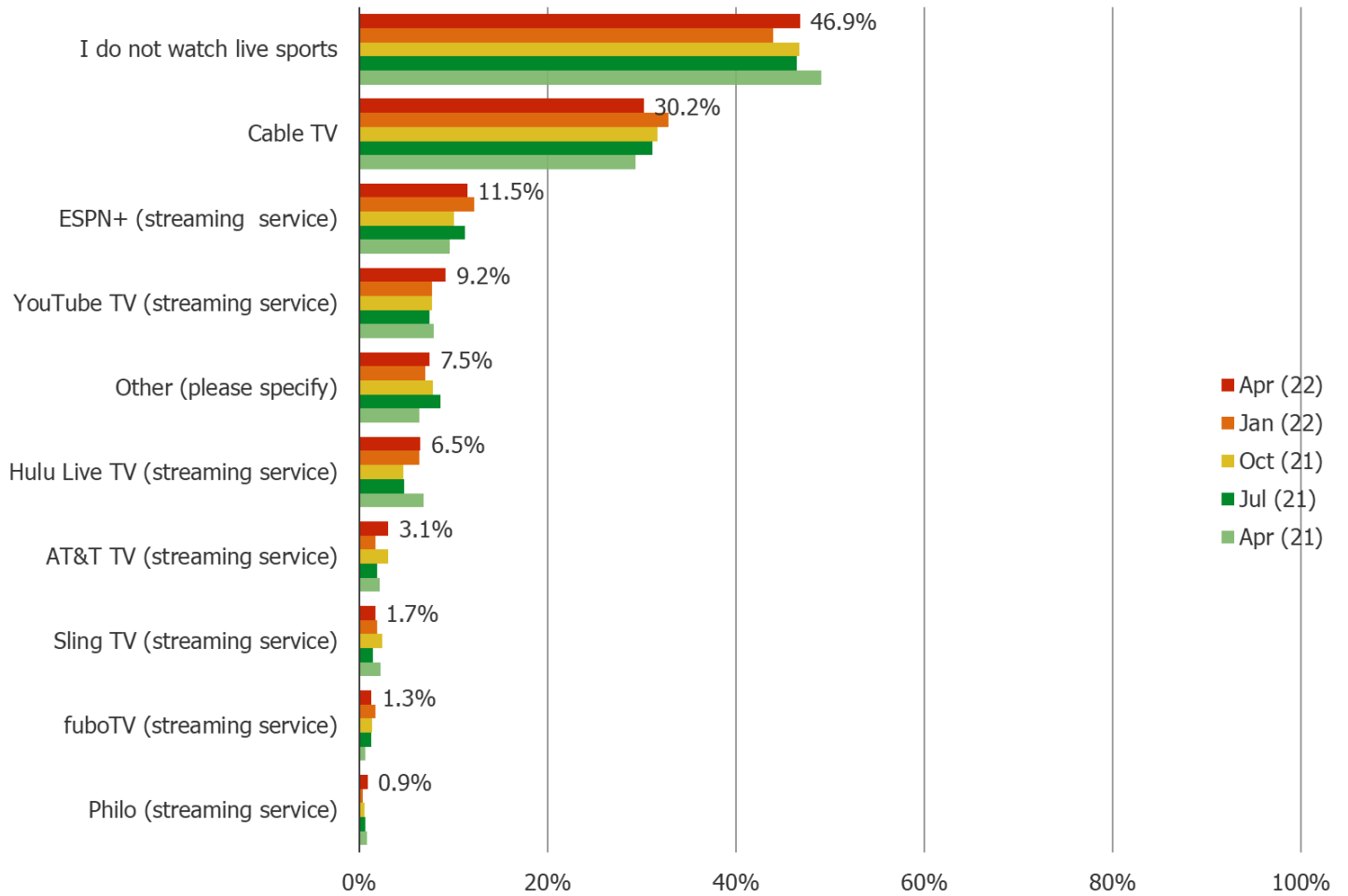


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CABLE TV AND LIVE SPORTS

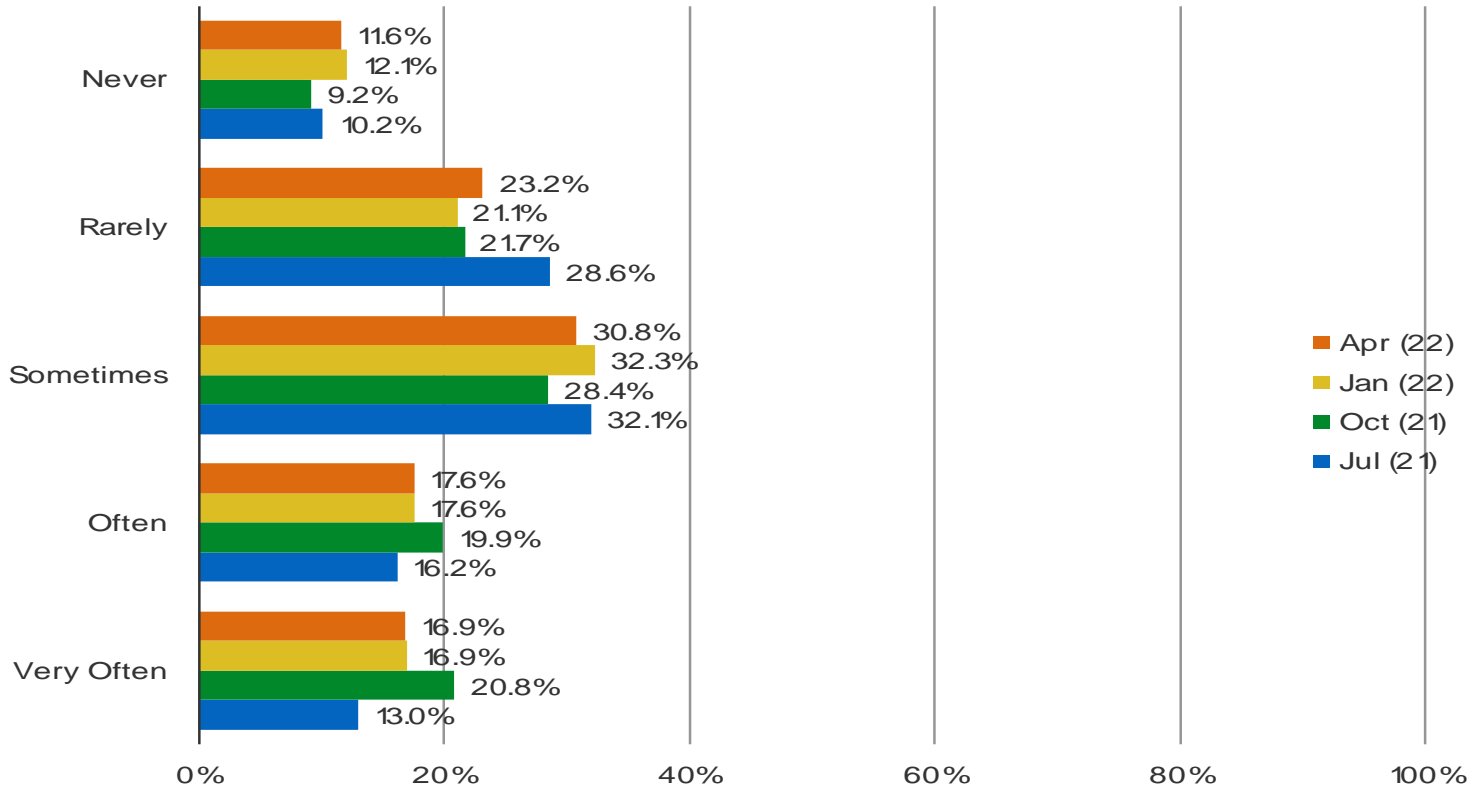
DO YOU USE ANY OF THE FOLLOWING TO WATCH LIVE SPORTS? SELECT ALL THAT APPLY

Posed to all respondents.



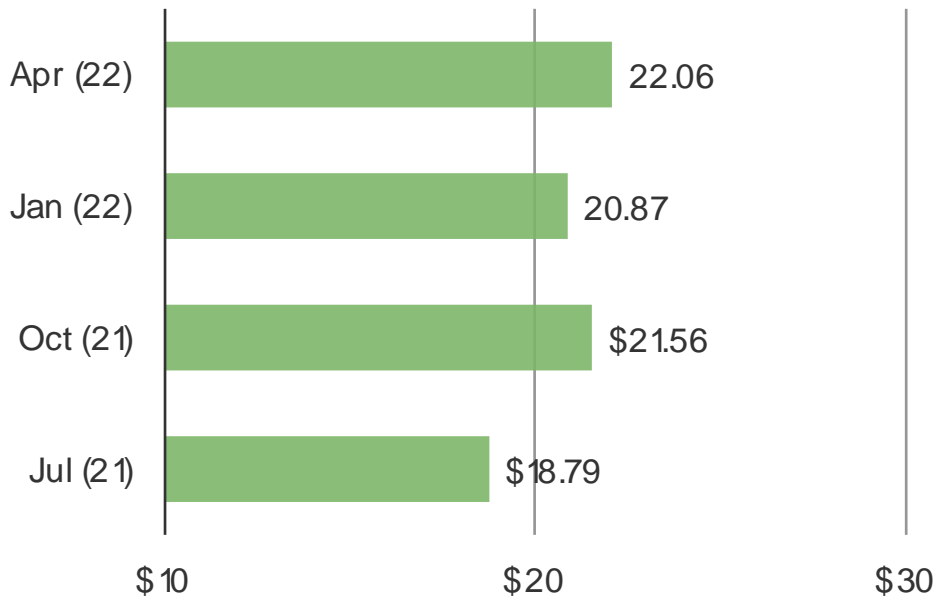
HOW OFTEN DO YOU WATCH ESPN ON CABLE TV?

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



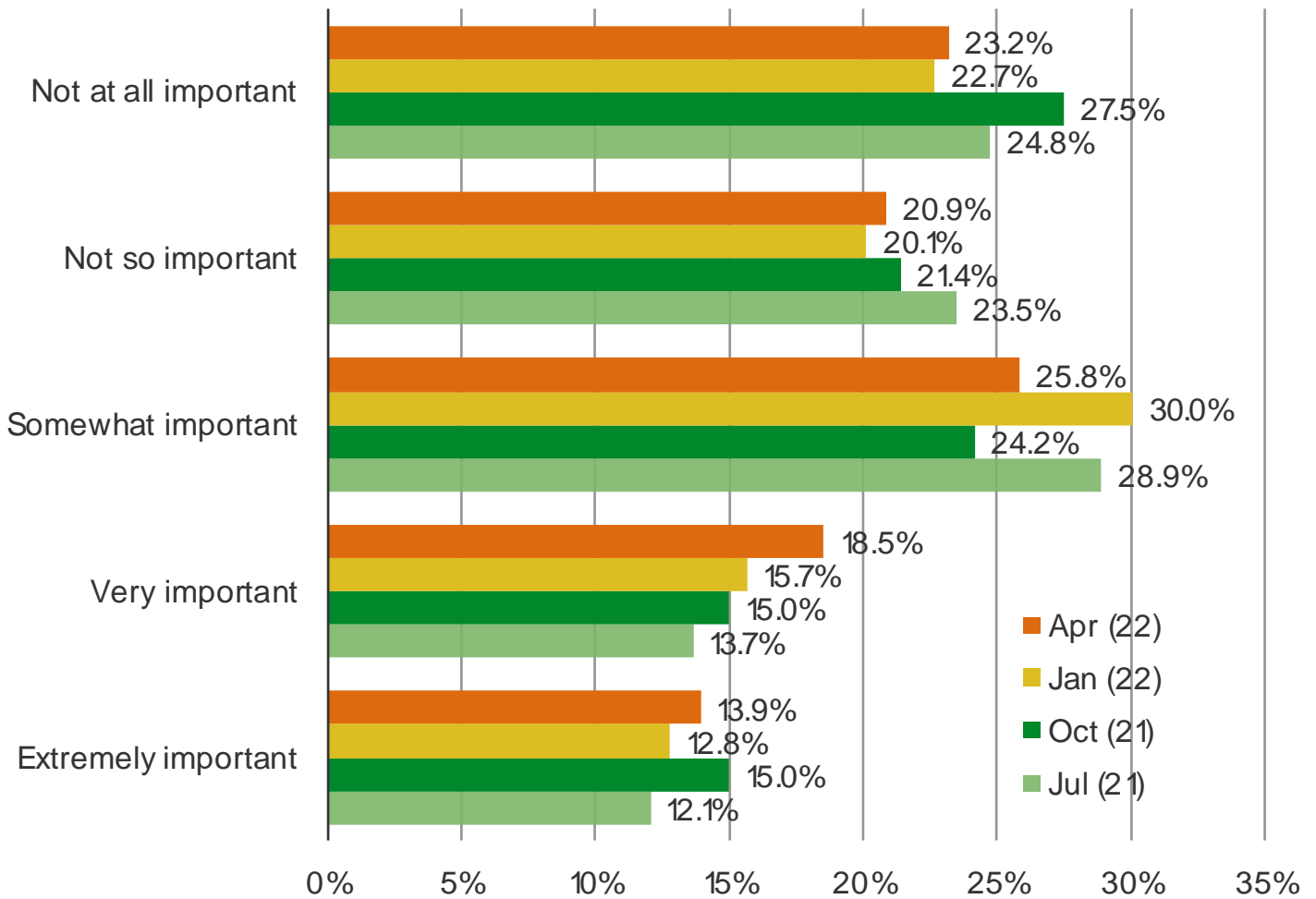
IF YOU DID NOT HAVE CABLE TV, HOW MUCH WOULD YOU BE WILLING TO PAY PER MONTH IN ORDER TO STREAM LIVE SPORTS? (AVERAGE)

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.

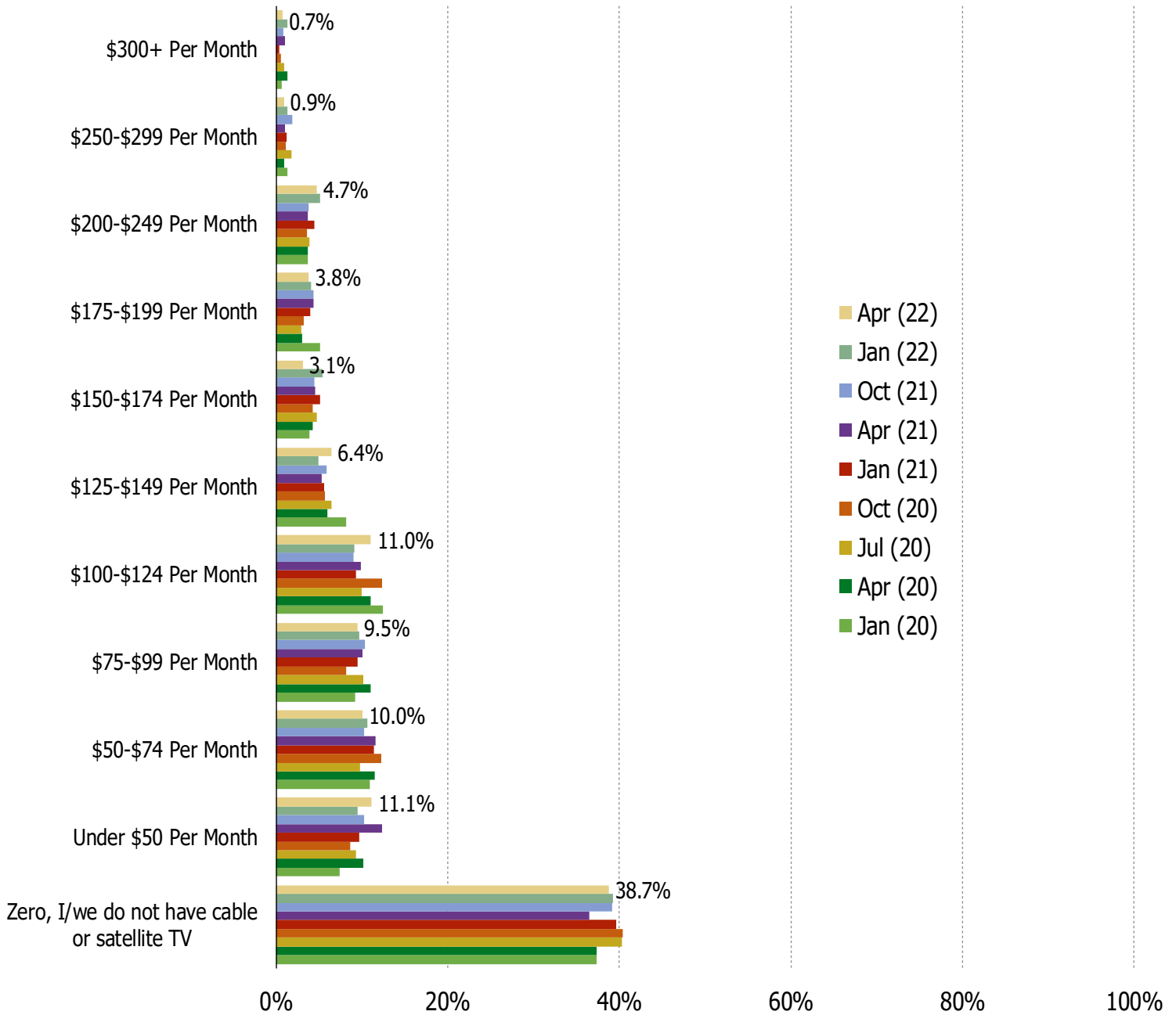


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SPEND ON CONTENT

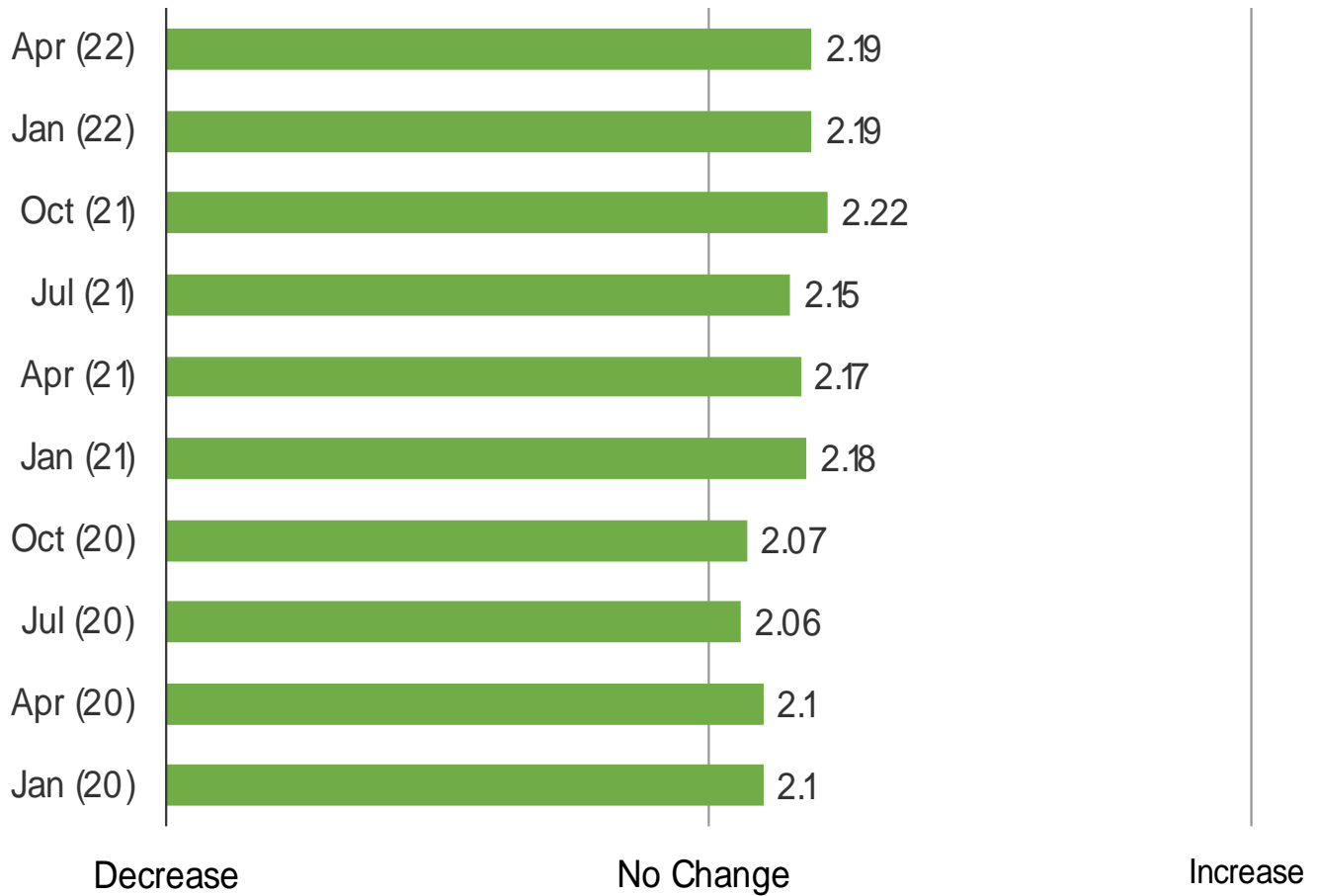
APPROXIMATELY HOW MUCH DO YOU SPEND ON CABLE/SATELLITE TV SERVICES PER MONTH?

Posed to respondents who watch video content at home.



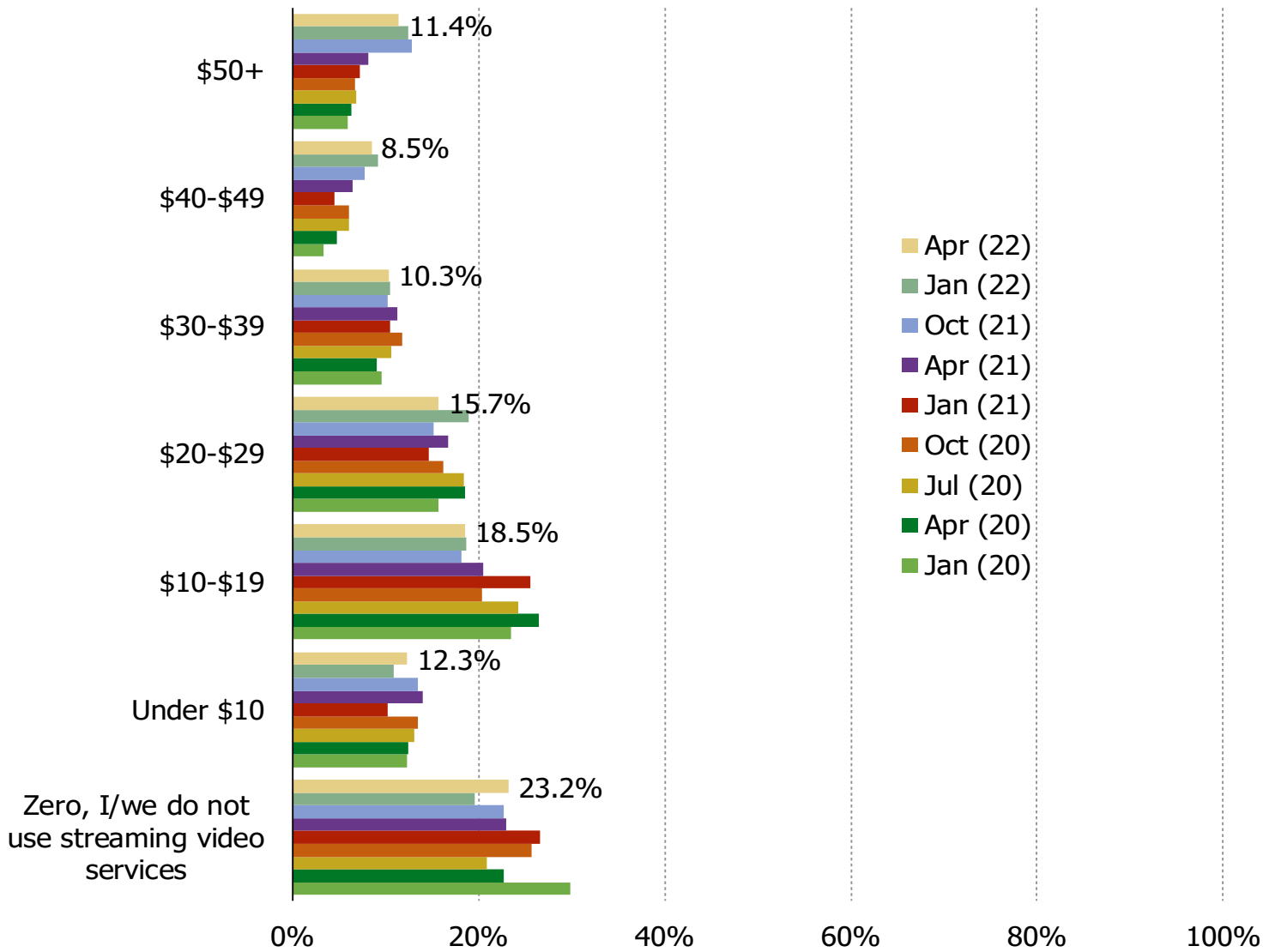
IN THE NEXT YEAR, DO YOU EXPECT THE AMOUNT YOU PAY PER MONTH FOR CABLE OR SATELLITE TV TO CHANGE IN ANY WAY?

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



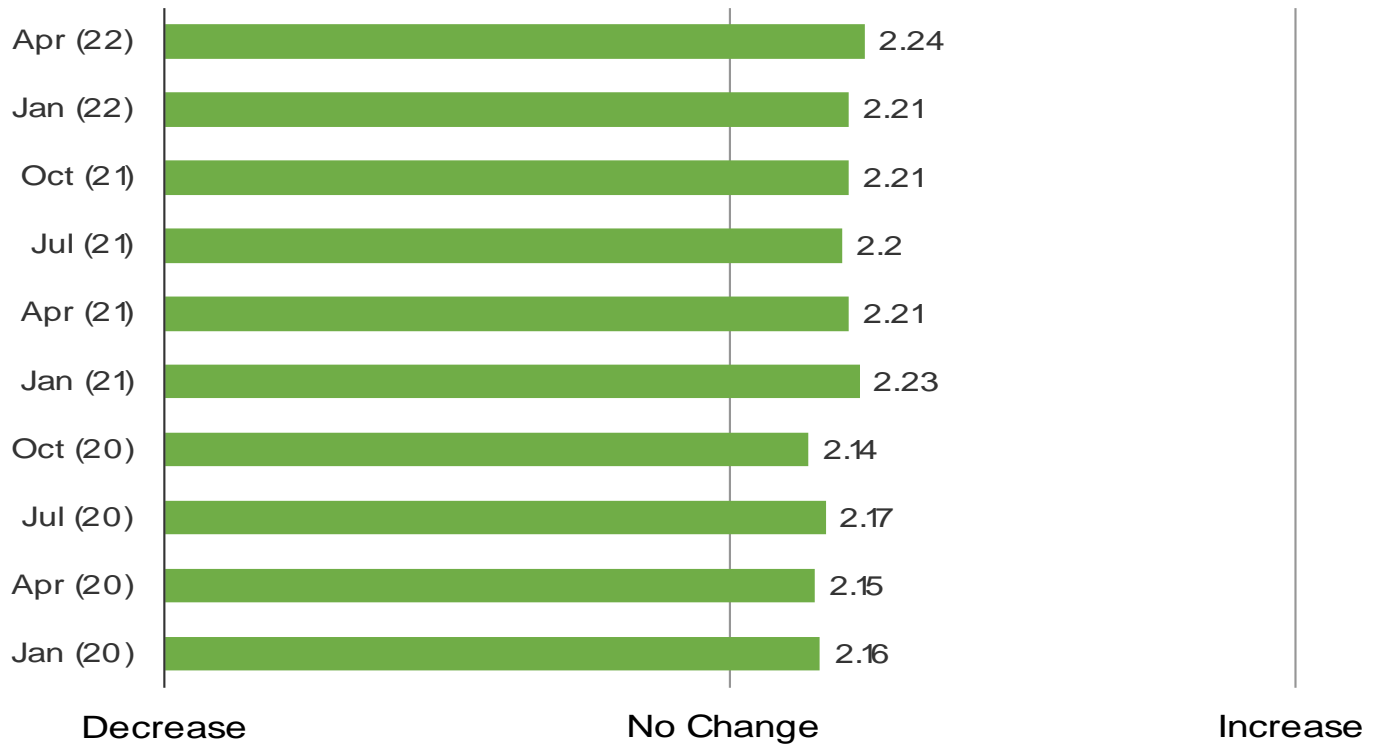
APPROXIMATELY HOW MUCH DO YOU SPEND ON STREAMING VIDEO SERVICES PER MONTH?

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.

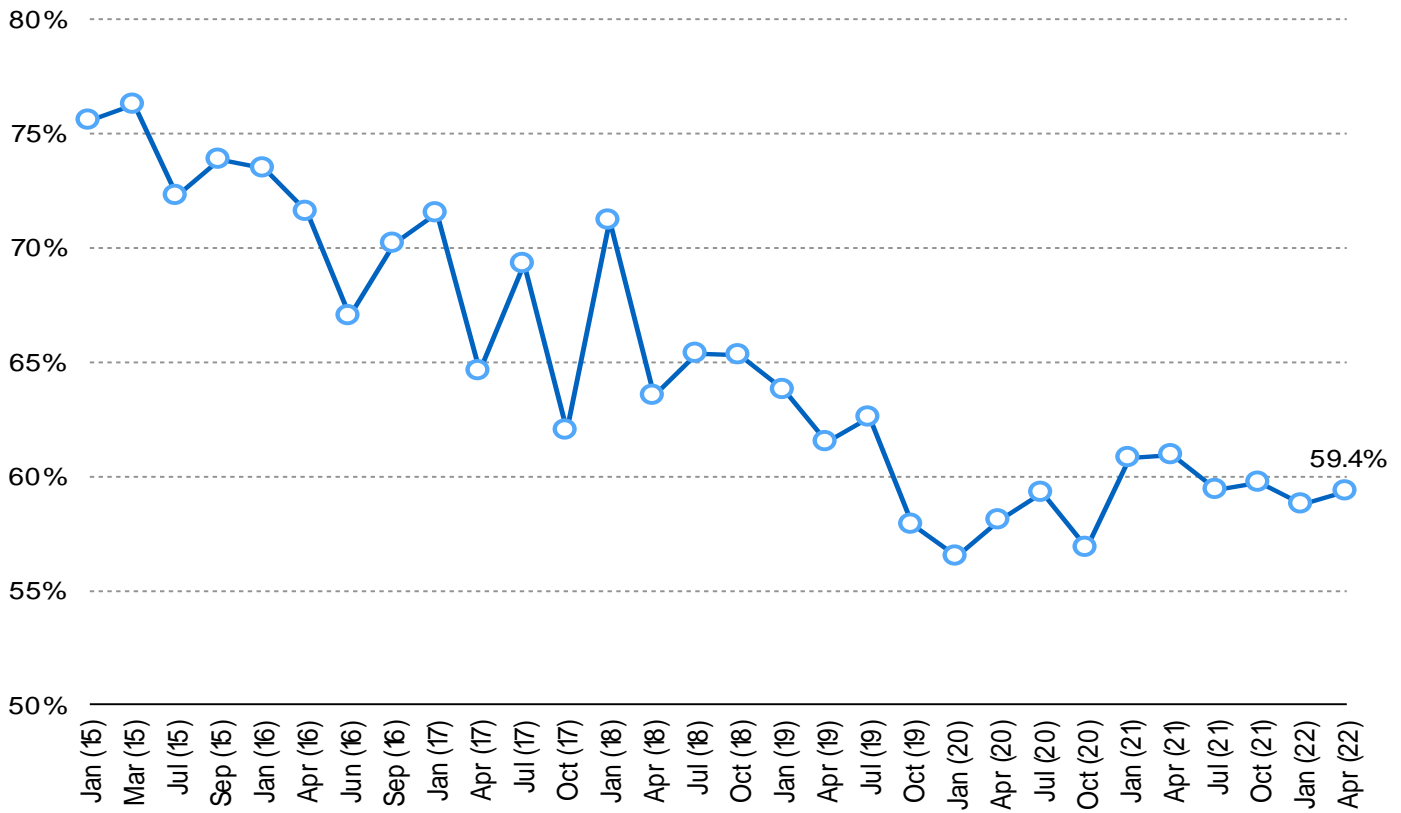


Streaming Wars

CORD CUTTING

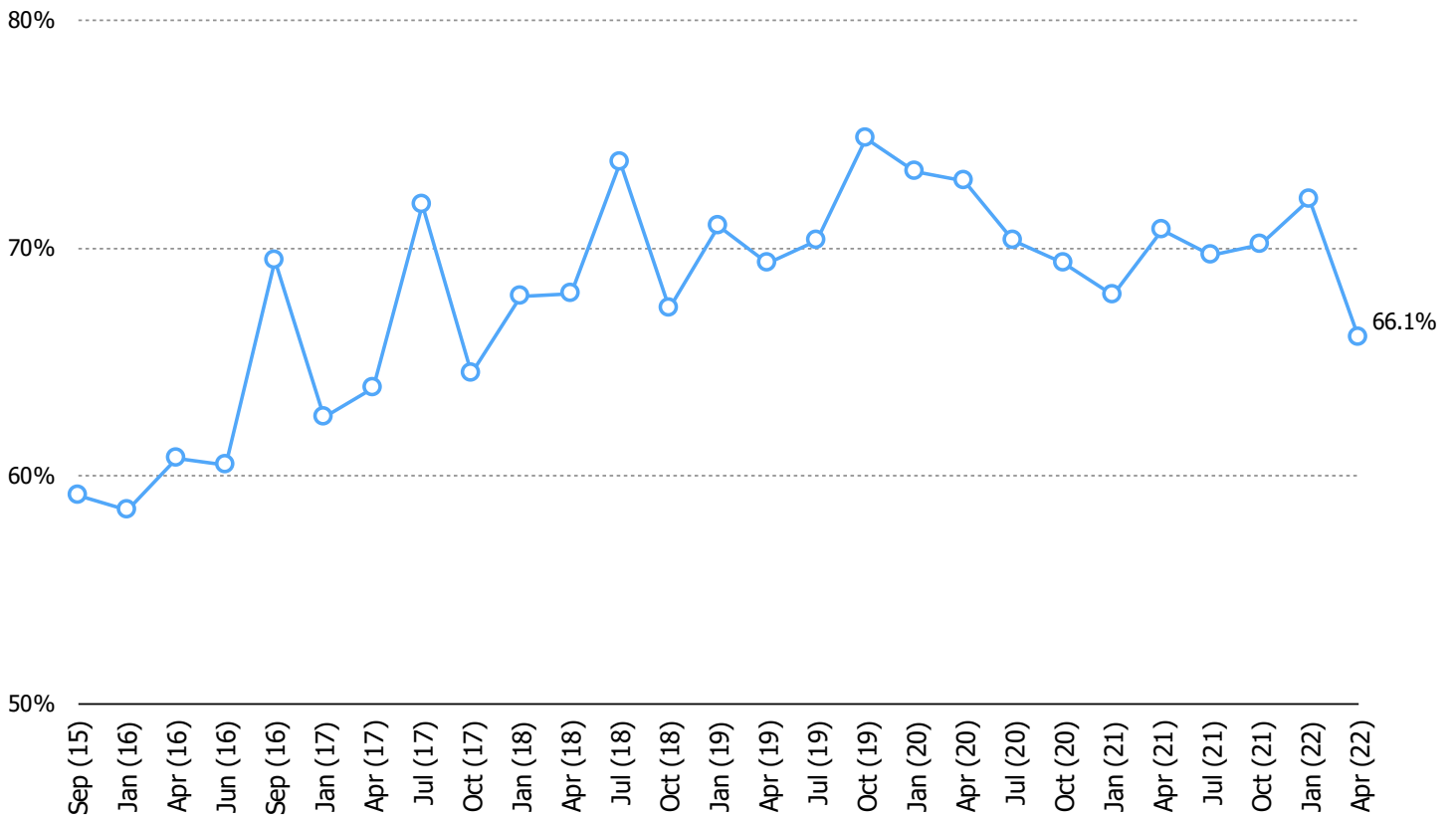
DO YOU CURRENTLY SUBSCRIBE TO CABLE, SATELLITE, OR TELCO TV?

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.

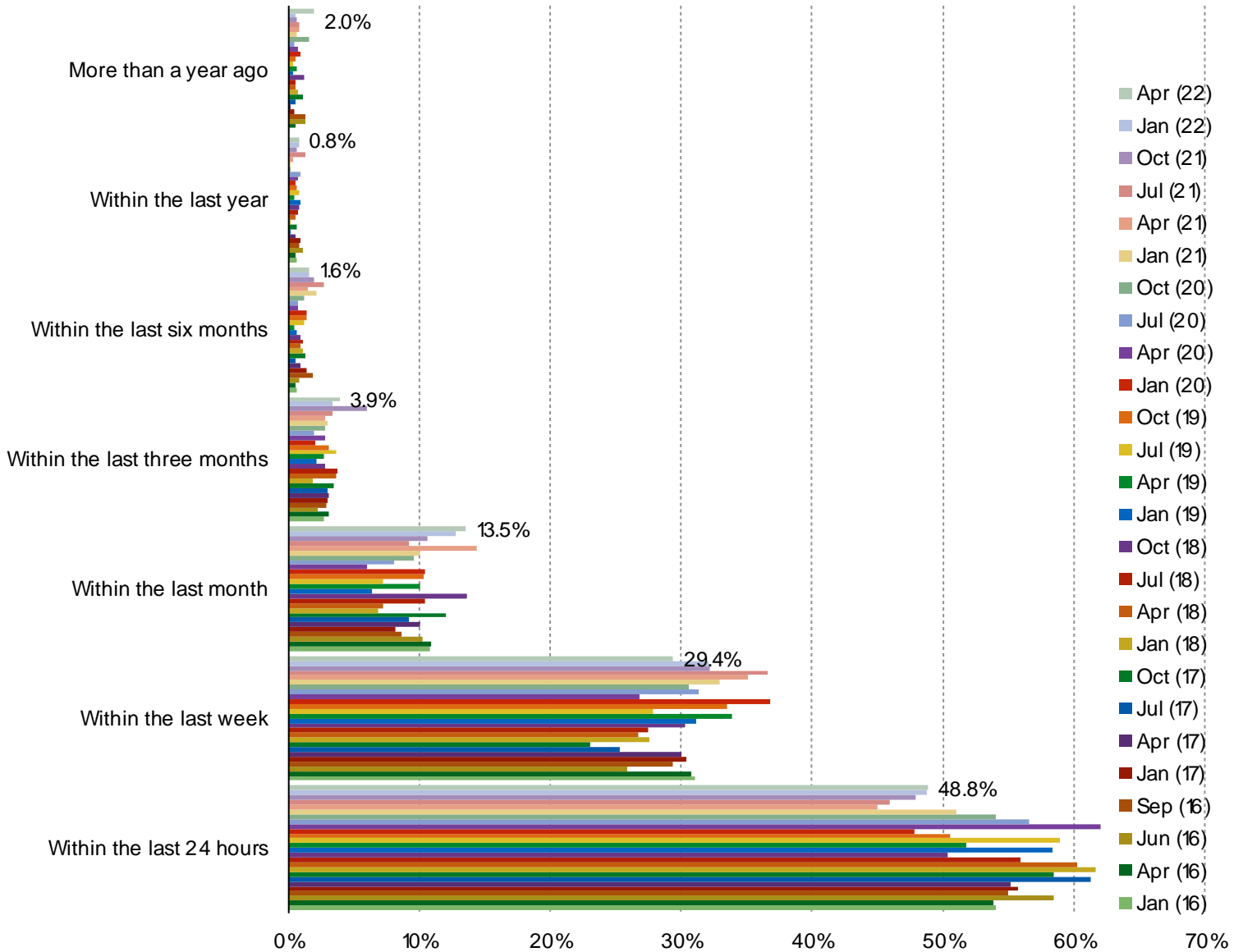


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NETFLIX SUBSCRIBER ENGAGEMENT

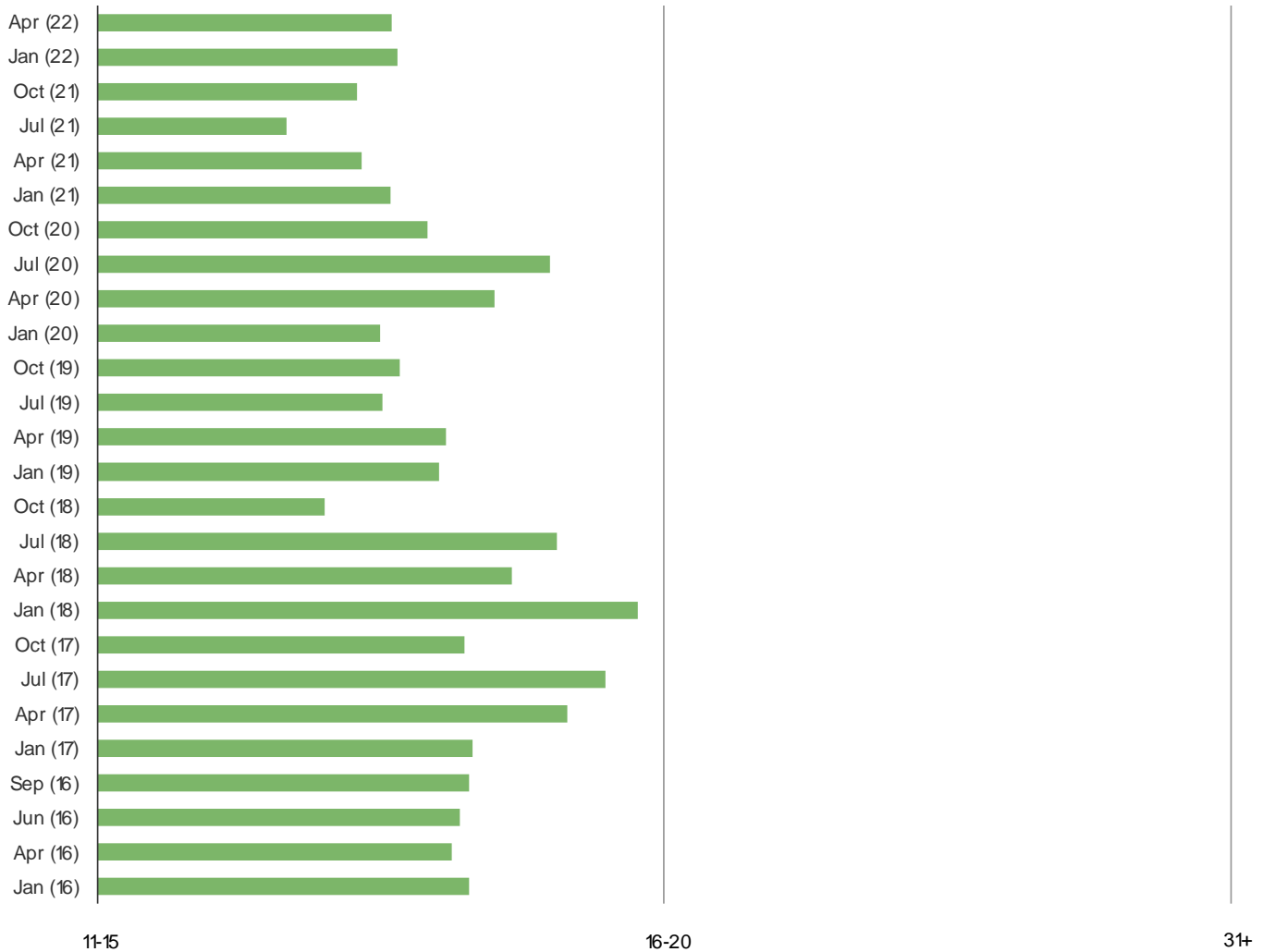
WHEN IS THE LAST TIME YOU WATCHED SOMETHING ON NETFLIX?

Posed to Netflix subscribers.



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

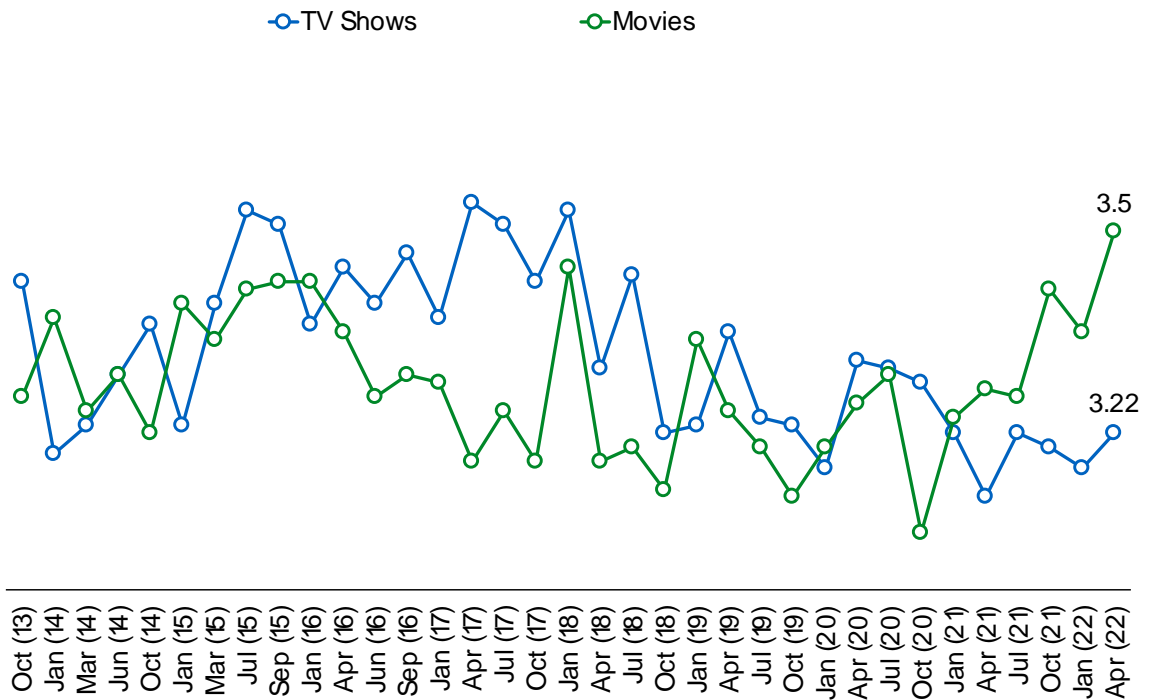
Posed to Netflix subscribers.



FREQUENCY OF WATCHING TV SHOWS AND MOVIES

Posed to Netflix subscribers.

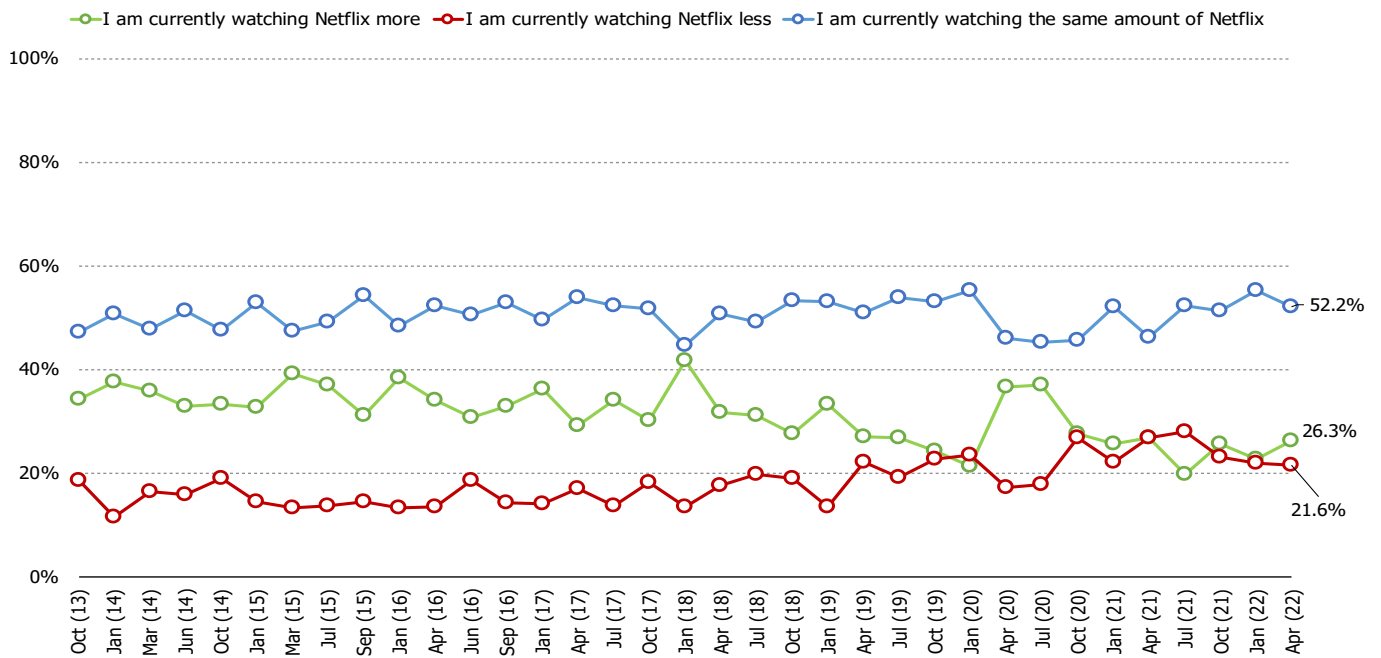
Frequently



Somewhat Frequently

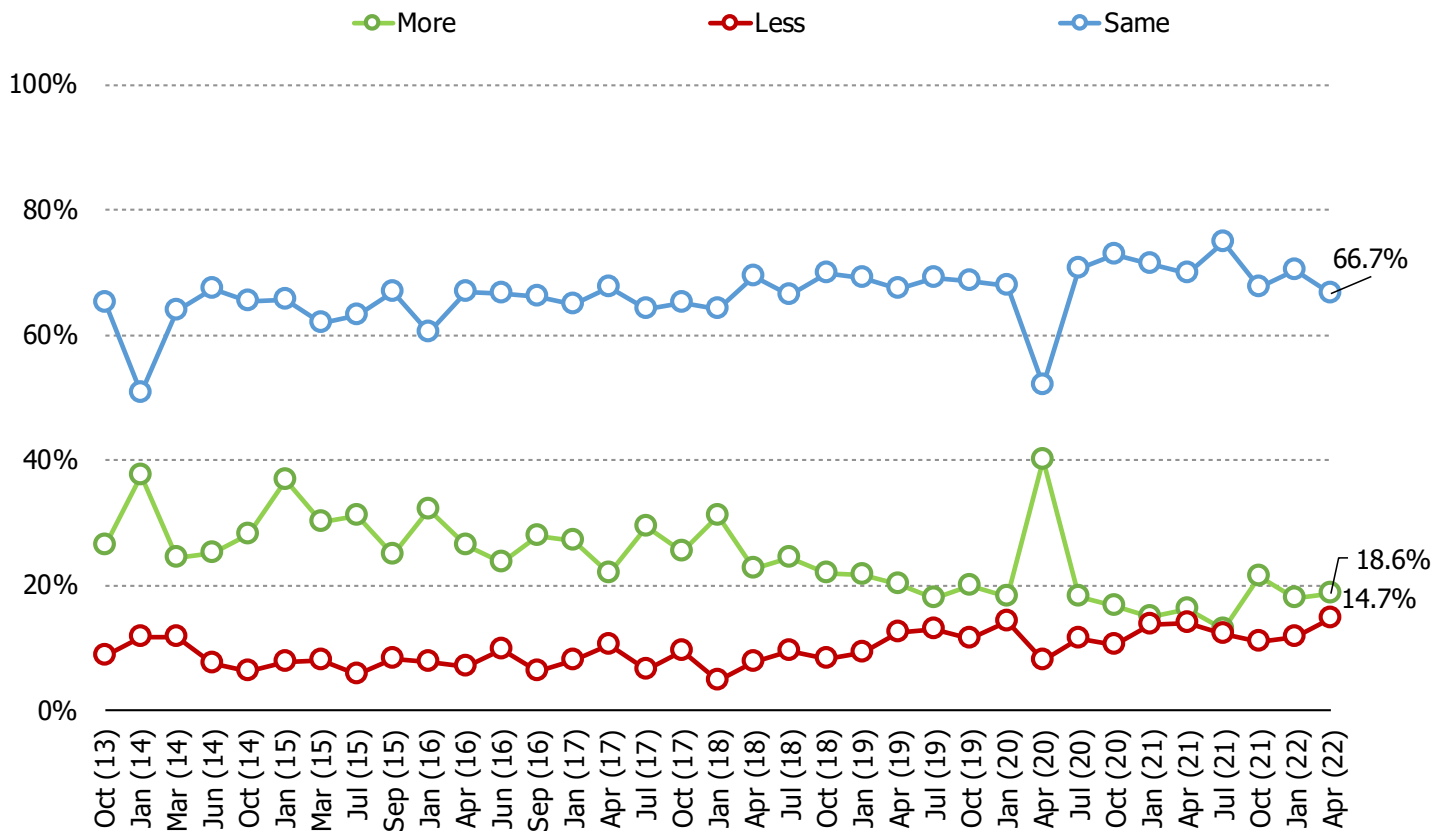
PLEASE COMPARE YOUR CURRENT USAGE OF NETFLIX WITH YOUR USAGE 3-6 MONTHS AGO.

Posed to Netflix subscribers.



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

Posed to Netflix subscribers.

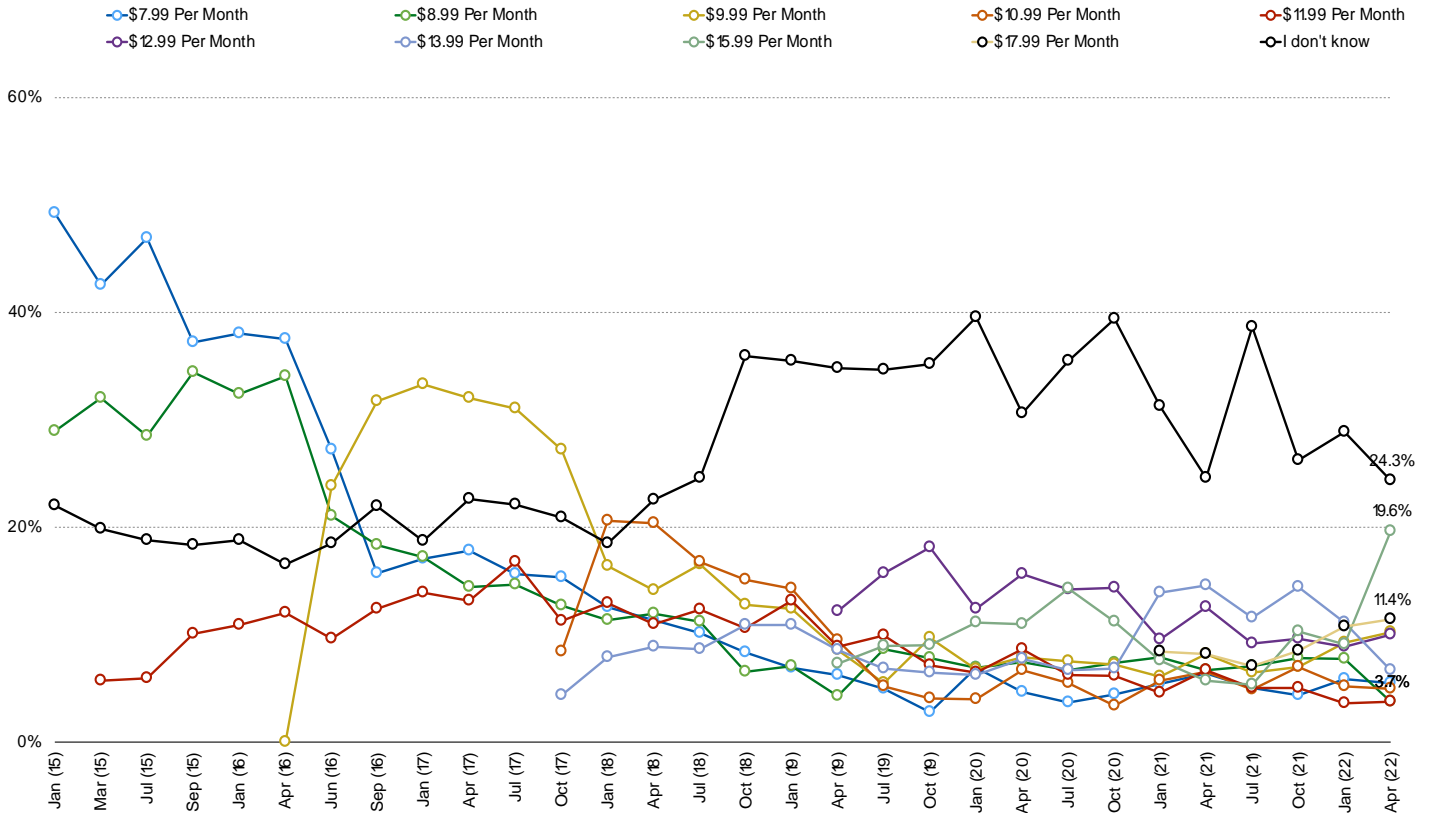


Streaming Wars

NETFLIX PRICING POWER

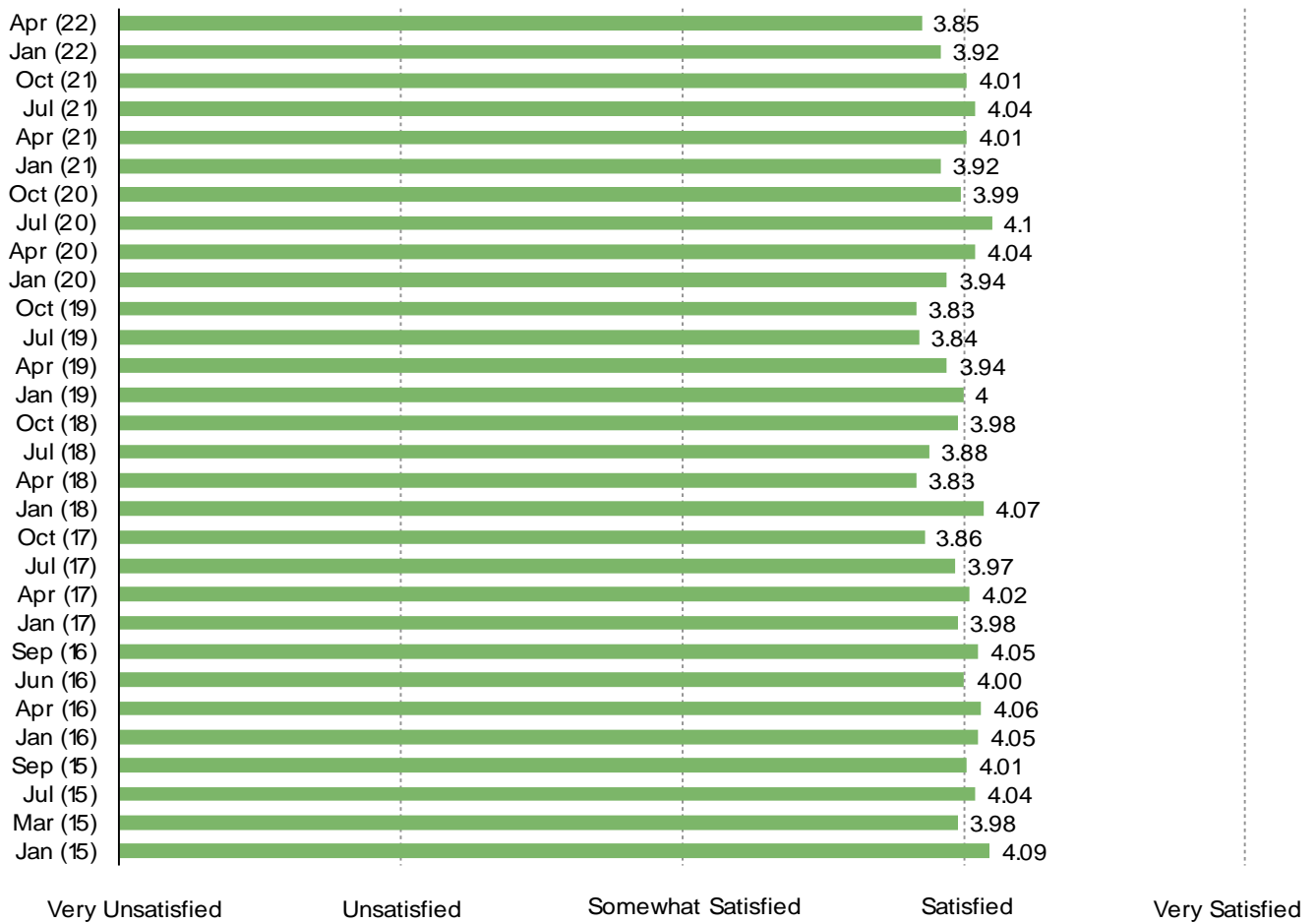
HOW MUCH DO YOU PAY FOR YOUR NETFLIX STREAMING SUBSCRIPTION?

Posed to respondents who said they are Netflix subscribers.



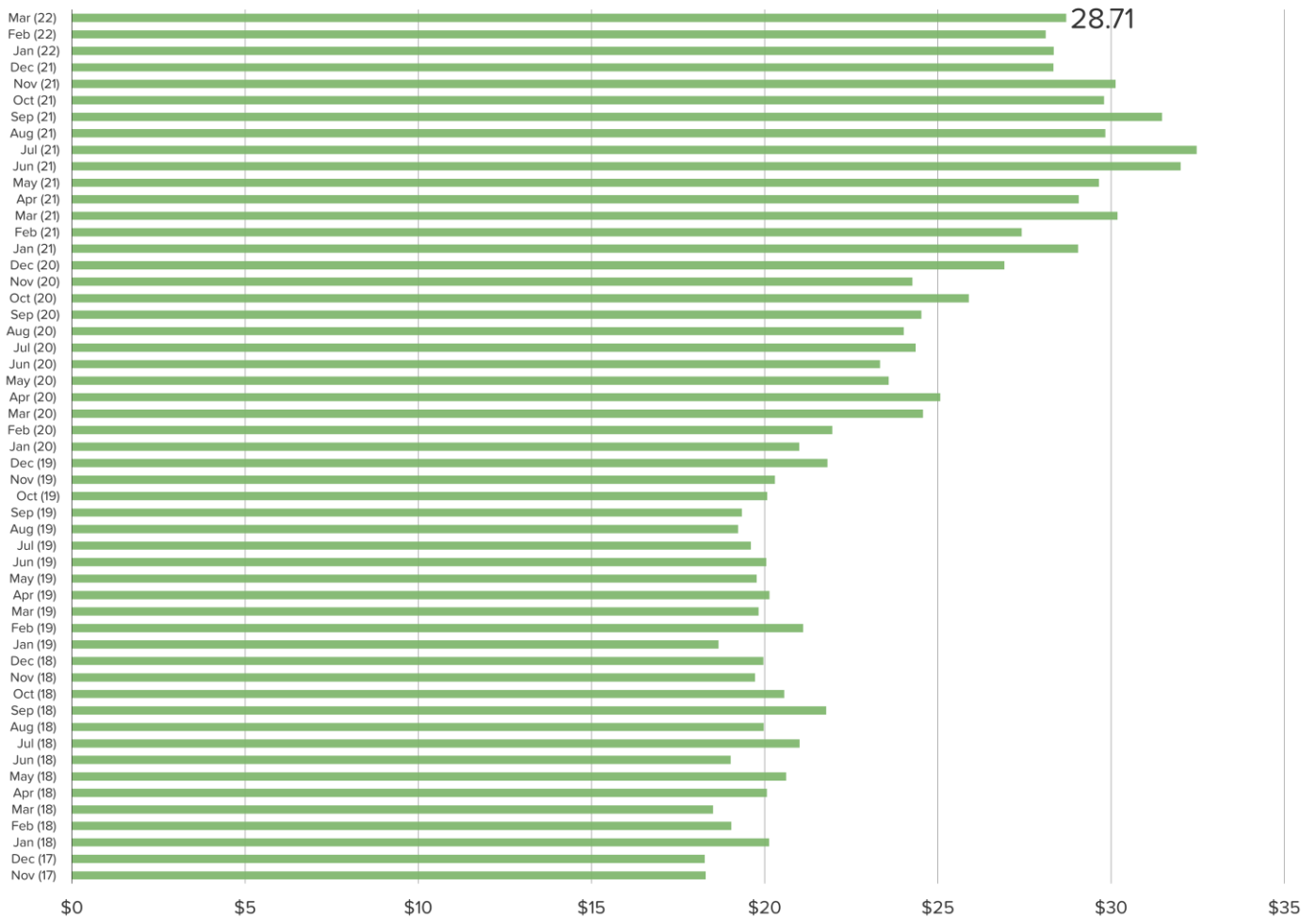
SATISFACTION WITH THE VALUE THEY RECEIVE FOR THE MONEY WITH NETFLIX

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.

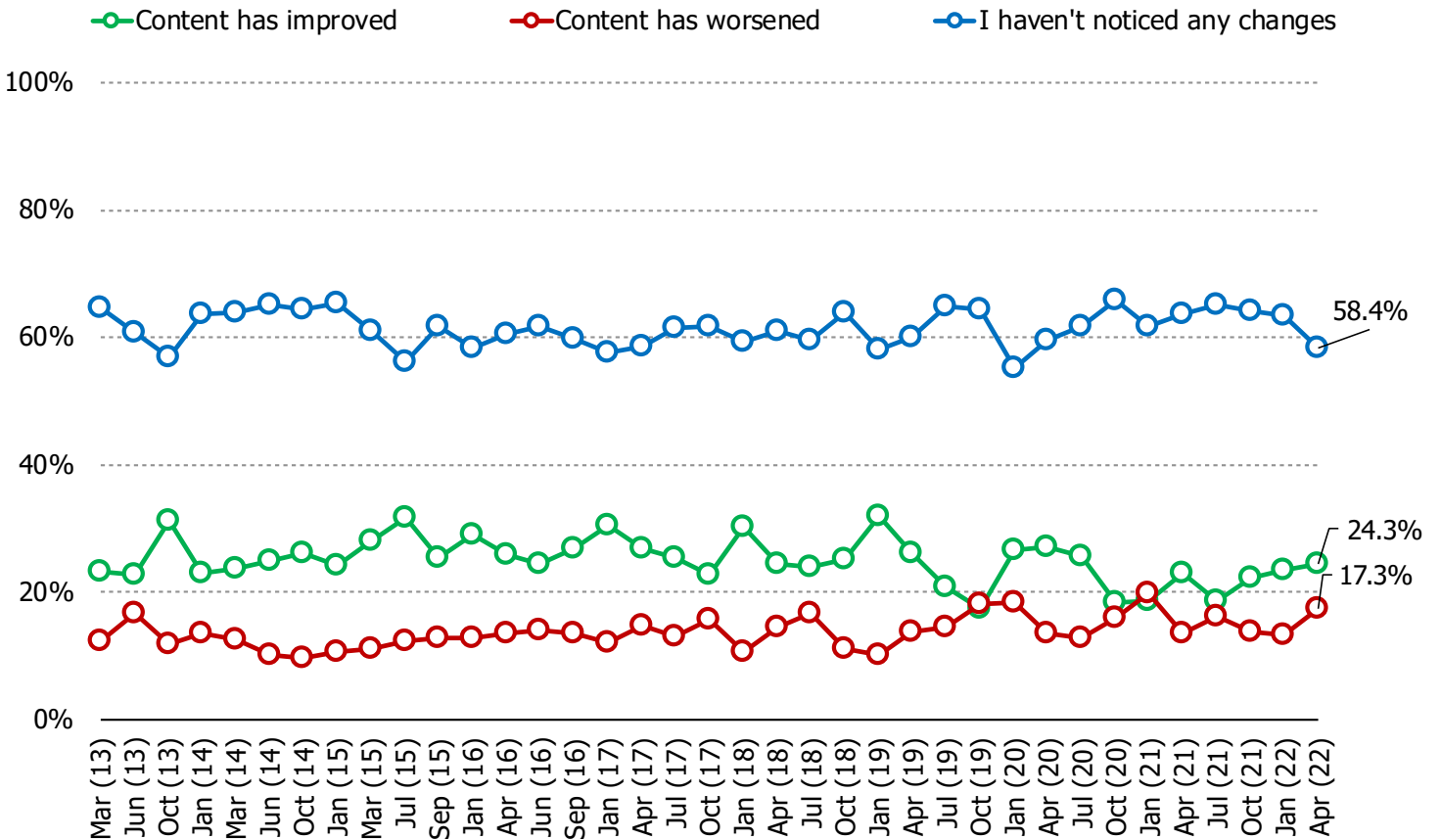


Streaming Wars

NETFLIX CONTENT

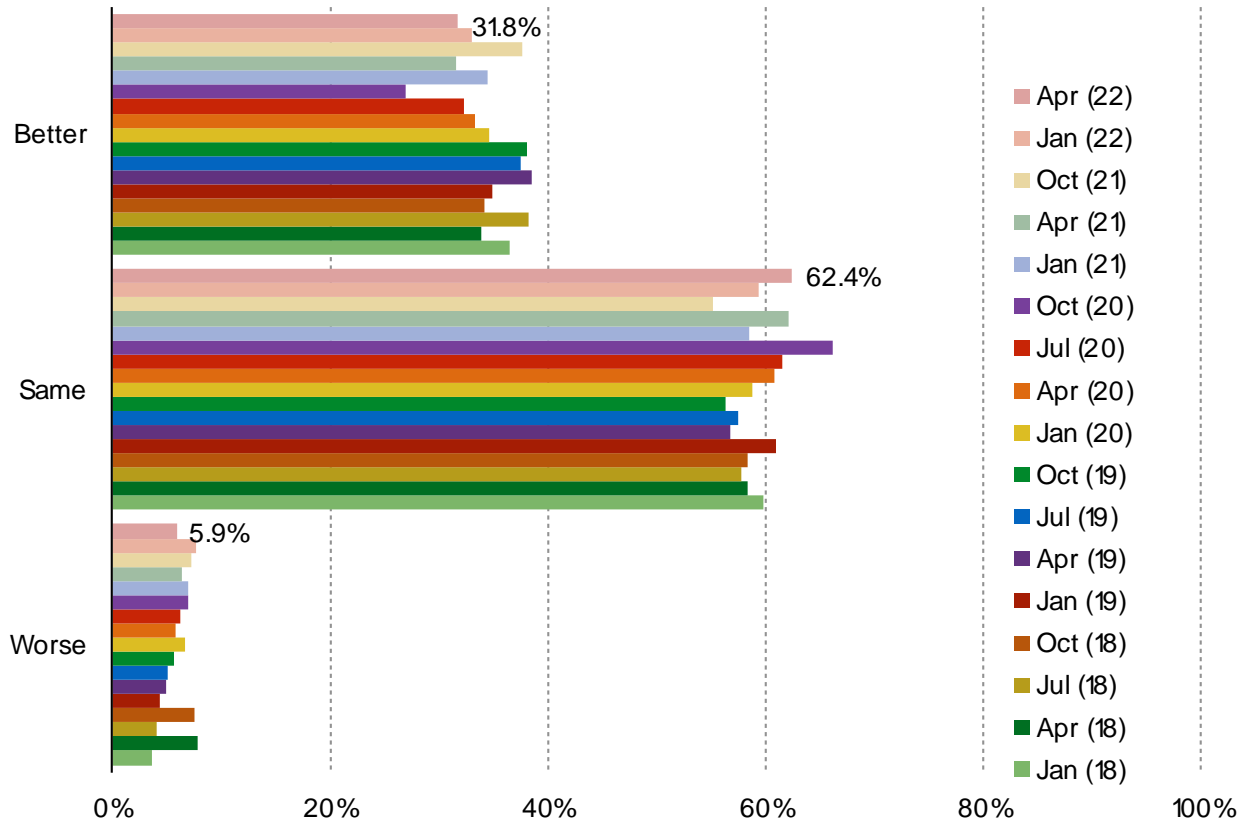
HAVE YOU NOTICED ANY CHANGES TO NETFLIX'S CONTENT OVER THE LAST SIX MONTHS?

Posed to Netflix subscribers.



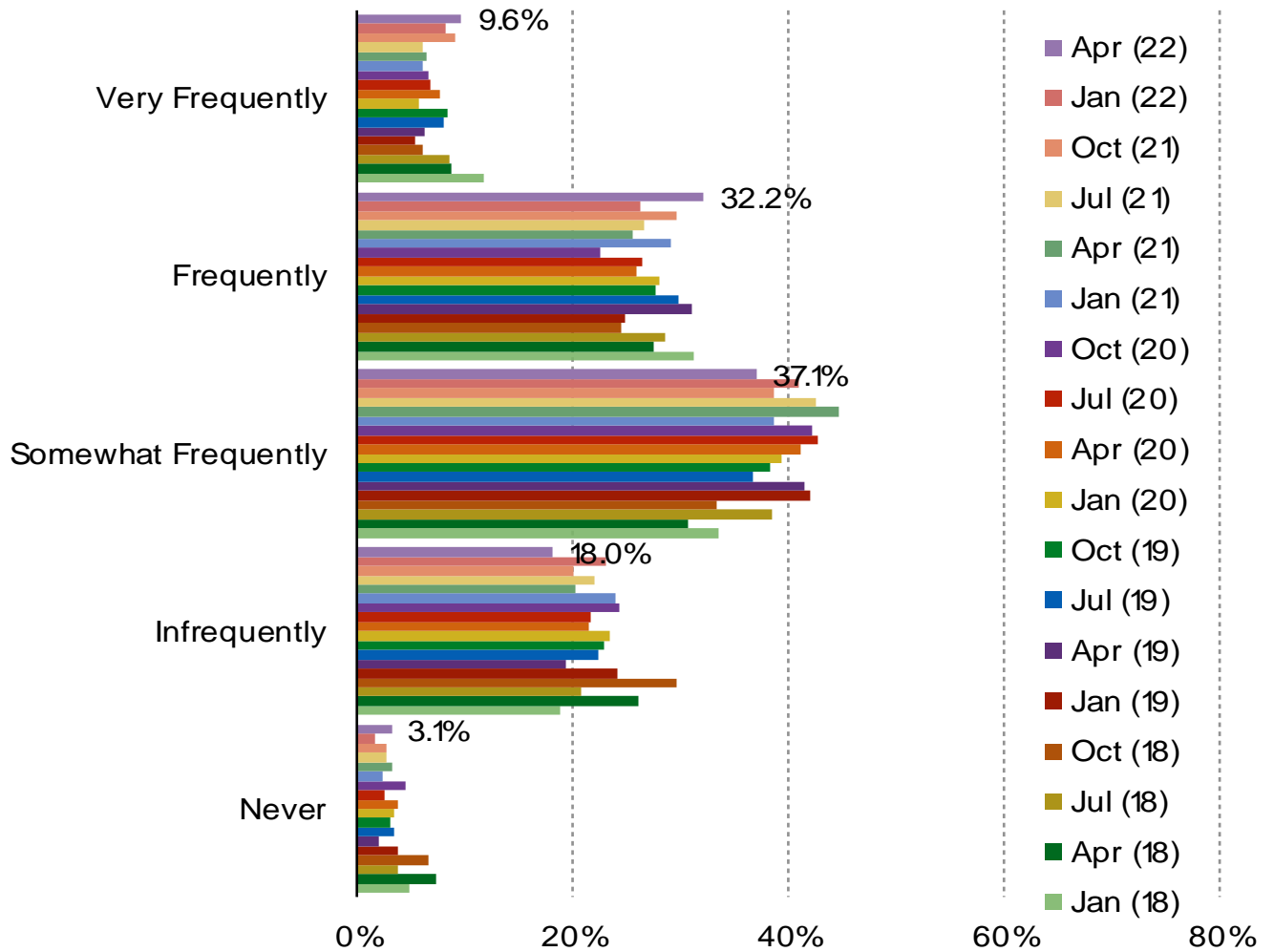
HOW DO YOU COMPARE NETFLIX ORIGINAL CONTENT SHOWS AGAINST SHOWS YOU VIEW ON OTHER NETWORKS OR SERVICES?

Posed to Netflix subscribers.



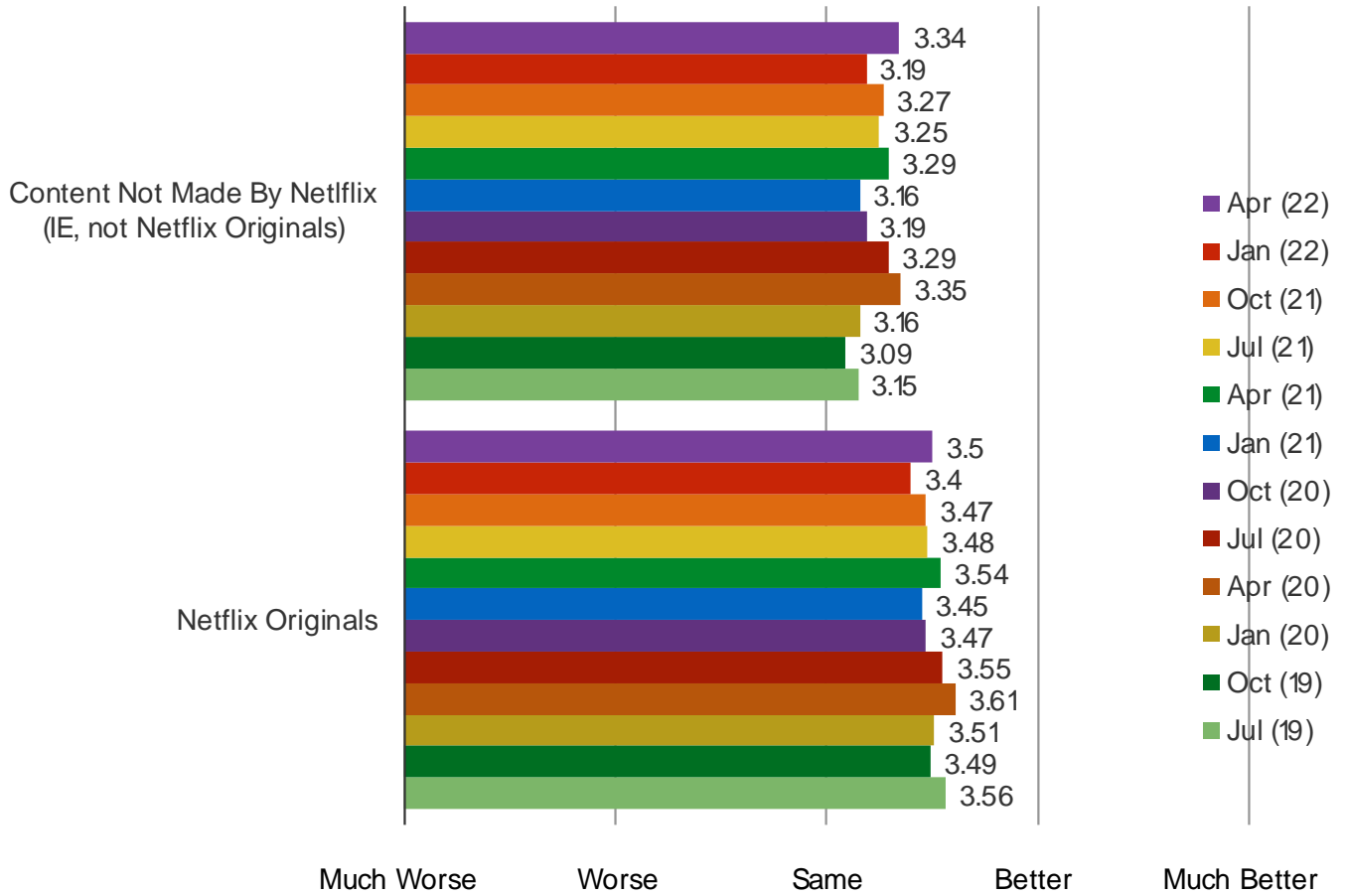
HOW OFTEN DO YOU WATCH NETFLIX ORIGINAL CONTENT SHOWS?

Posed to Netflix subscribers.



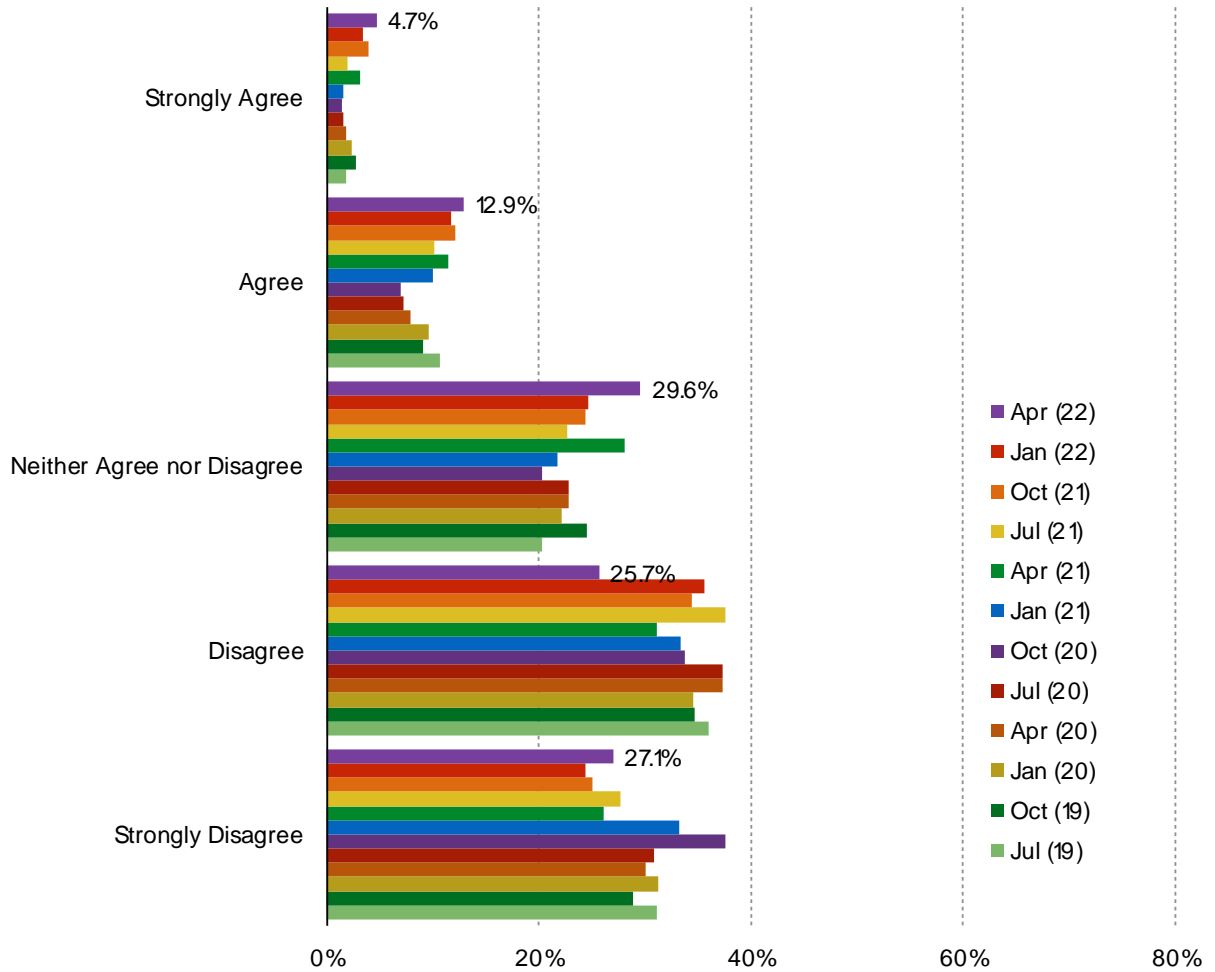
ONE YEAR FROM NOW, DO YOU EXPECT THE CONTENT AVAILABLE ON NETFLIX TO BE BETTER OR WORSE THAN IT IS TODAY?

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.

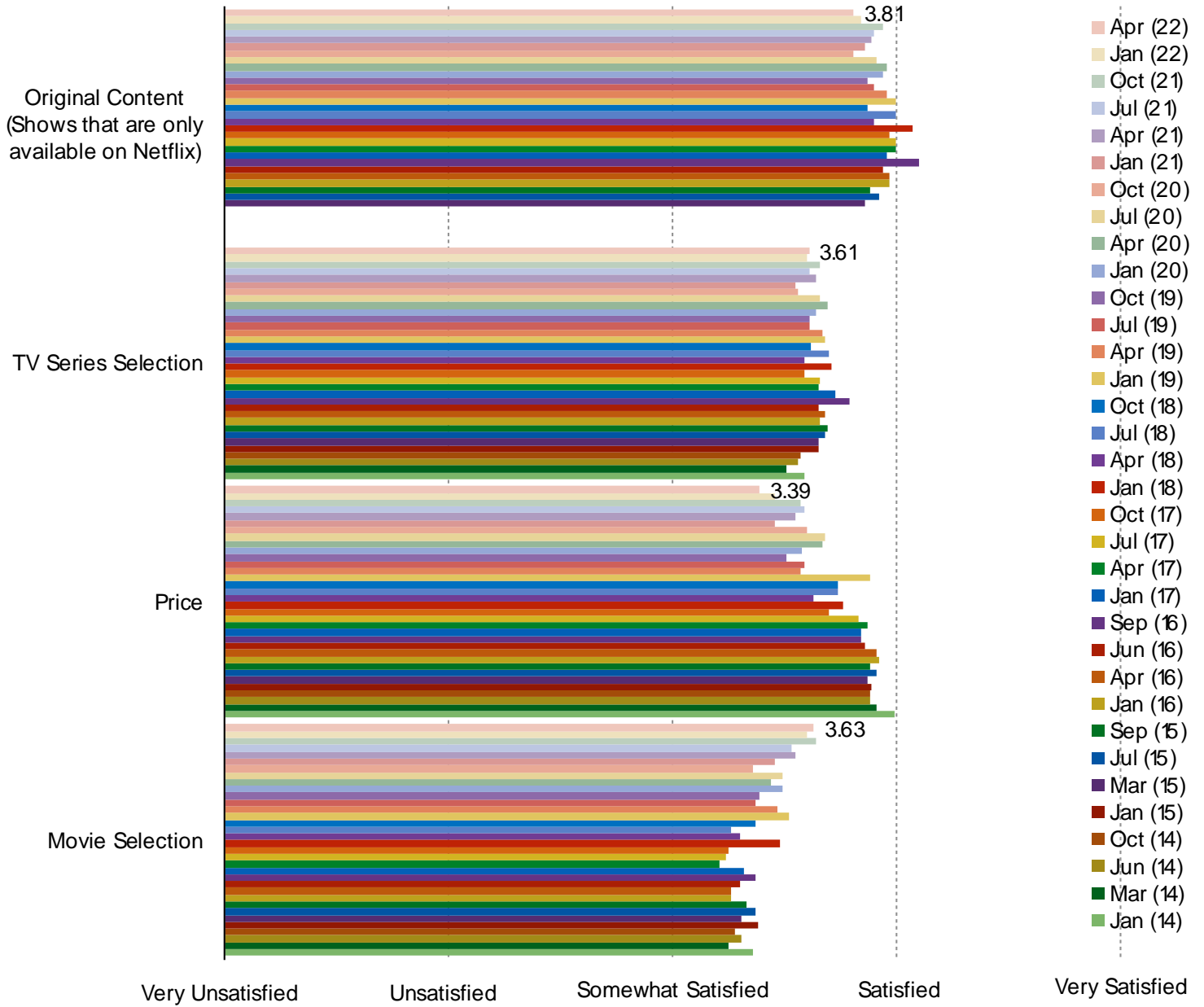


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NFLX SENTIMENT

SATISFACTION WITH NETFLIX

Posed to Netflix subscribers.

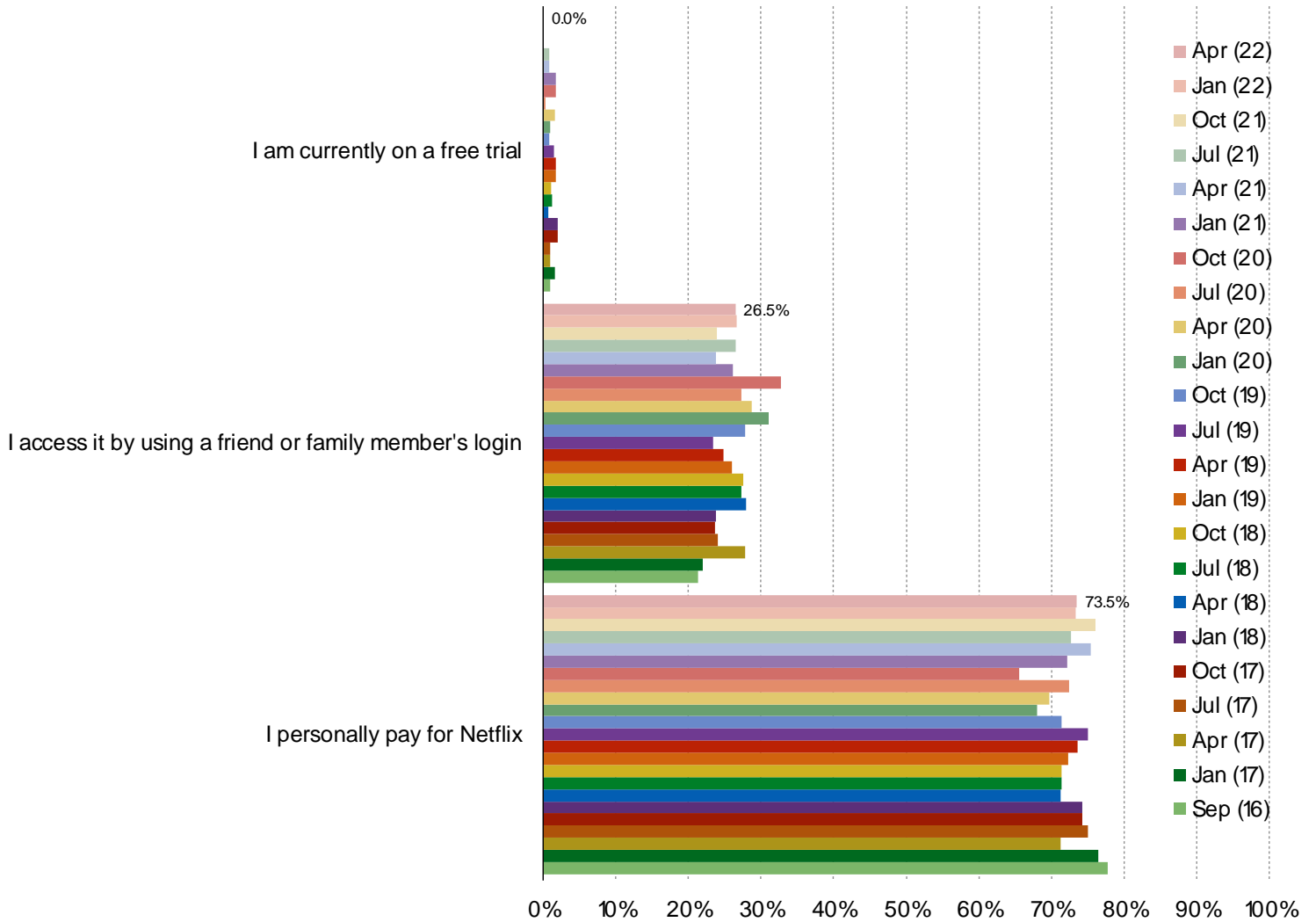


Streaming Wars

NFLX ACCOUNT SHARING

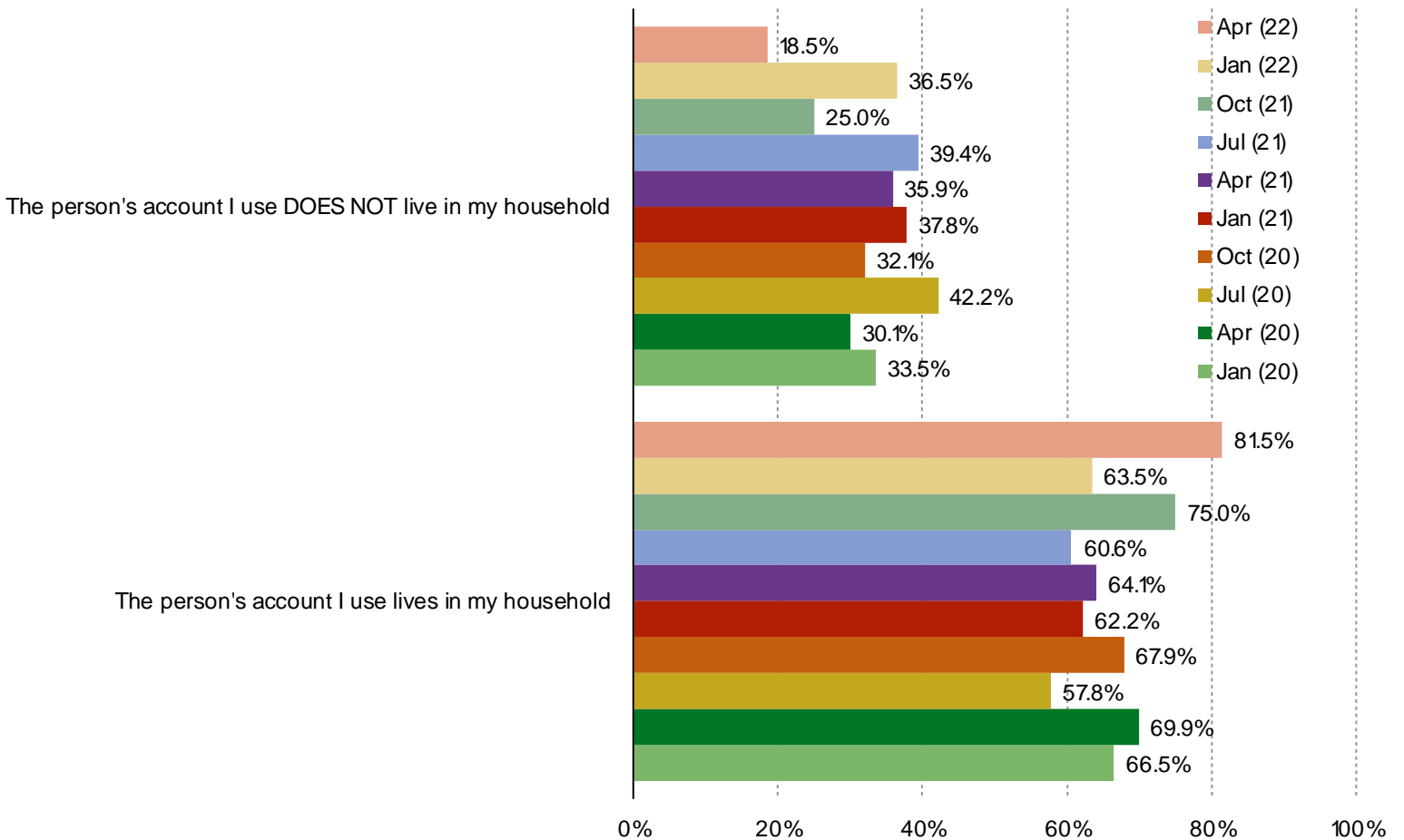
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

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).

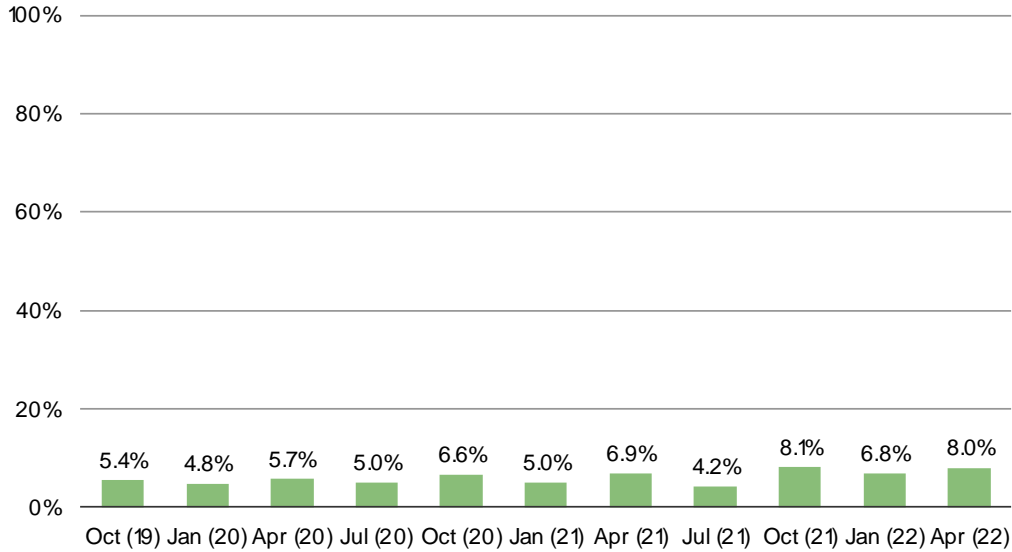


Streaming Wars

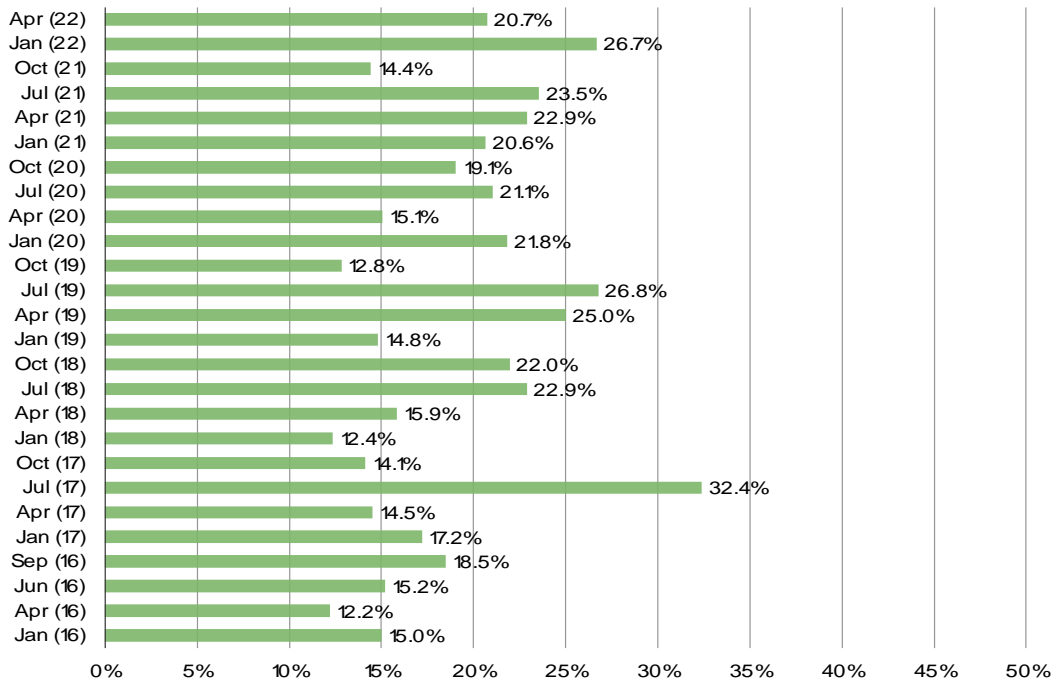
CYCLING IN AND OUT OF NETFLIX

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.

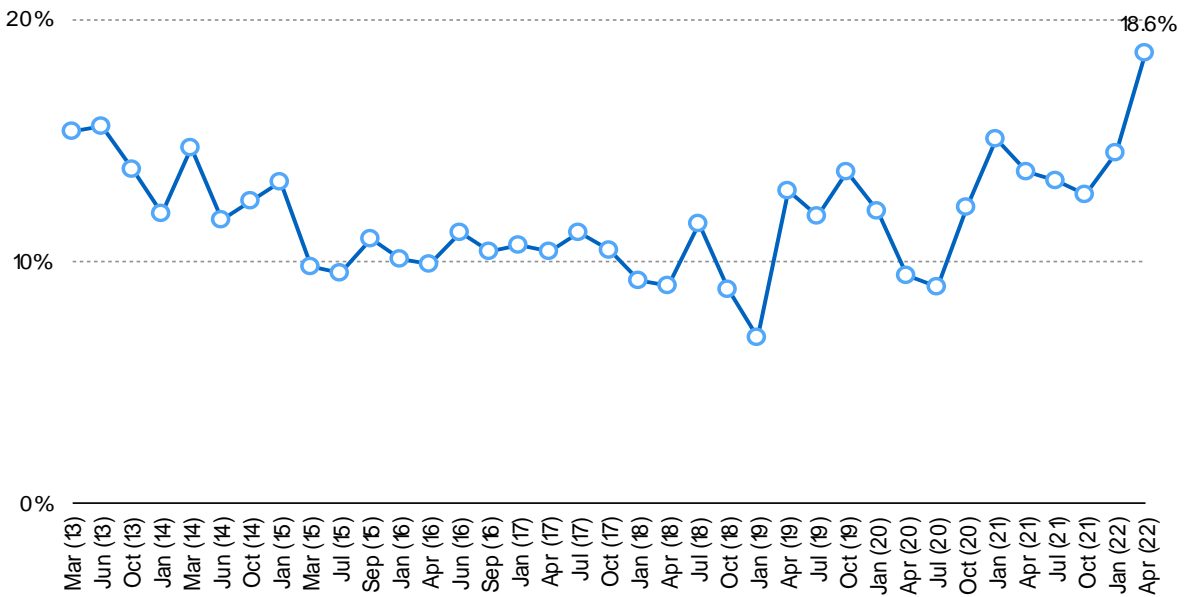


Streaming Wars

NFLX CHURN

ARE YOU CONSIDERING CANCELLING YOUR NETFLIX SUBSCRIPTION?

Posed to Netflix subscribers.



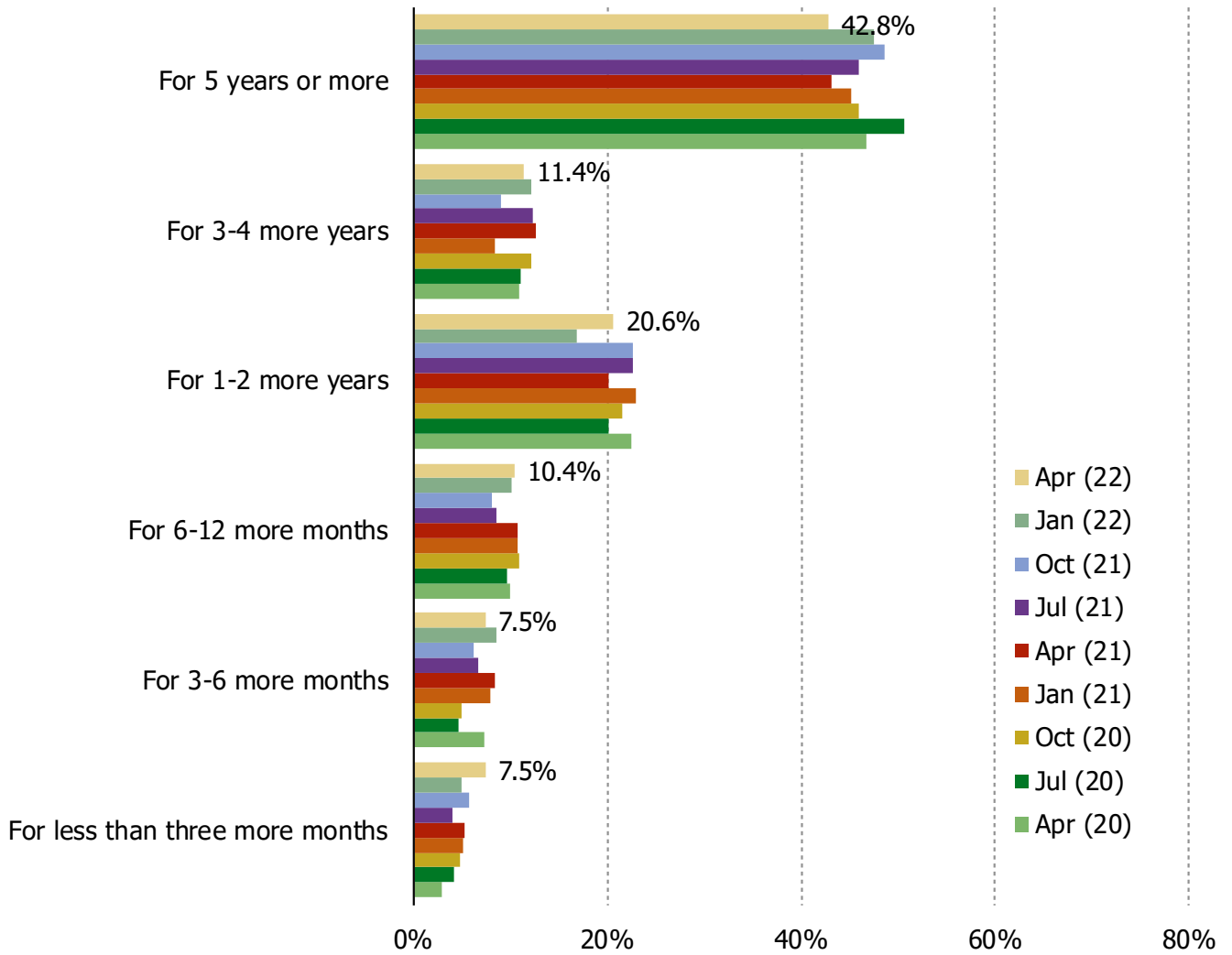
WHY ARE YOU CONSIDERING CANCELLING?

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
I haven't really noticed any new content and I don't think it's worth the price increase
The content isn't as good and the acting on some originals is very poor...
They never have any of the things i do want to watch. Movie selection is awful.
Bad
The prices going up
Because it's getting more expensive soon
Because the content is not what i wish to watch, and I don't want to pay for it anymore
Cost
Cost too much
Just nothing to watch
There is not a lot of new content on the service and other services are offering shows I would like to binge watch
I just don't use it anymore. As a maturing adult, I need to conserve my money. I spend too much time indoors.
Price
Price and content
Price and not enough original anime
Trash
They got rid of all the good shows and movies and the price is so much for bad quality of movies and shows
Boring
Too expensive
Price goes up and content goes down
Less good stuff
I mostly go for the original shows and they've been dipping in quality lately. The movie selection isn't great and the price just keeps climbing. It's not worth it anymore.
It is not as good
Well because I'm noticing that there's tons of free different options that you don't even have to pay for that are probably just as good or even better actually.
Netflix had the nerves to increase the amount to subscribe.
Content is not good
I don't like it
Old content out dated
Decreasing interest in content
Price increases
The price keeps going up*

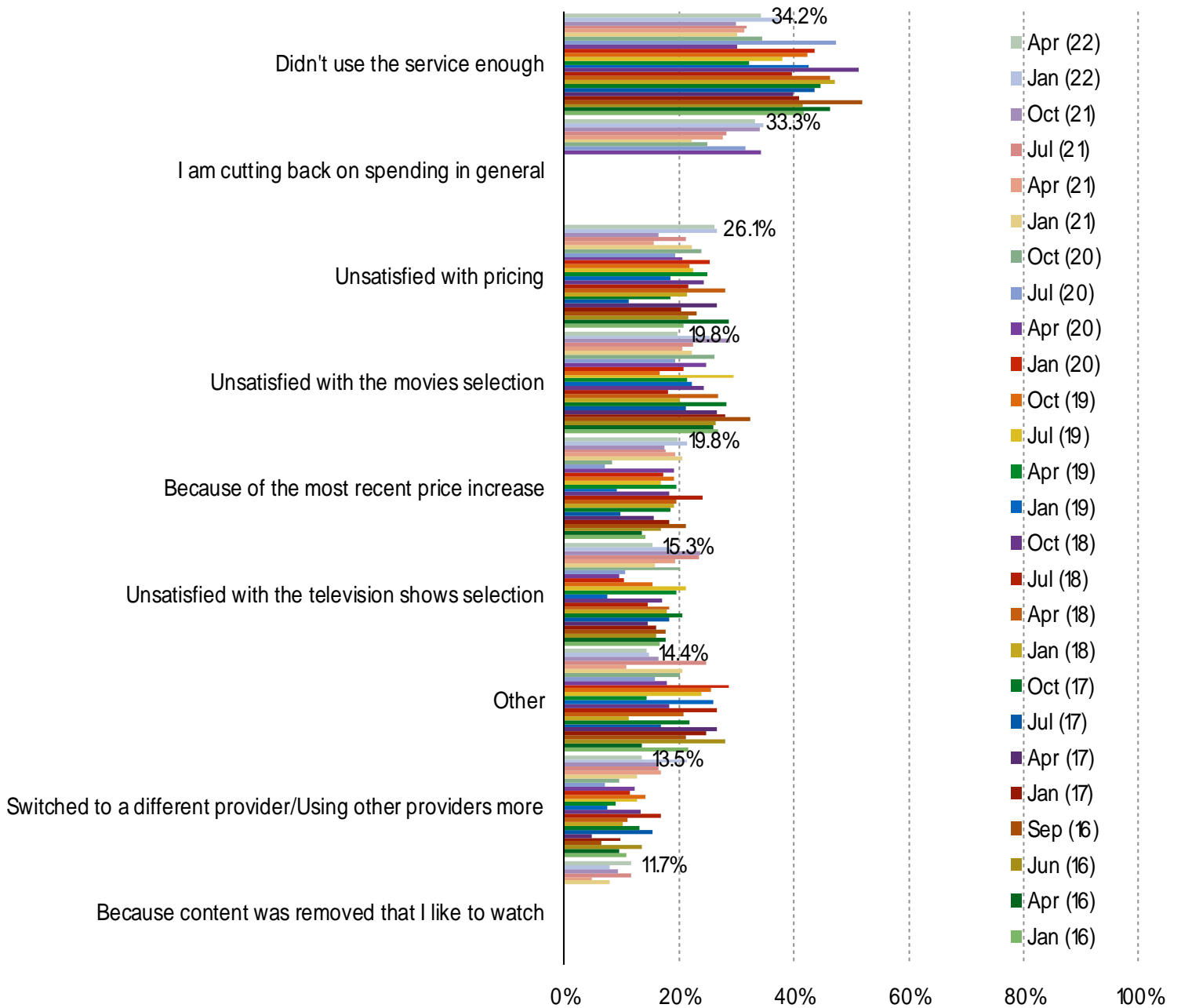
FOR HOW MUCH LONGER DO YOU EXPECT TO BE A NETFLIX SUBSCRIBER?

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 THE FOLLOWING FROM NETFLIX?

Posed to all respondents.

