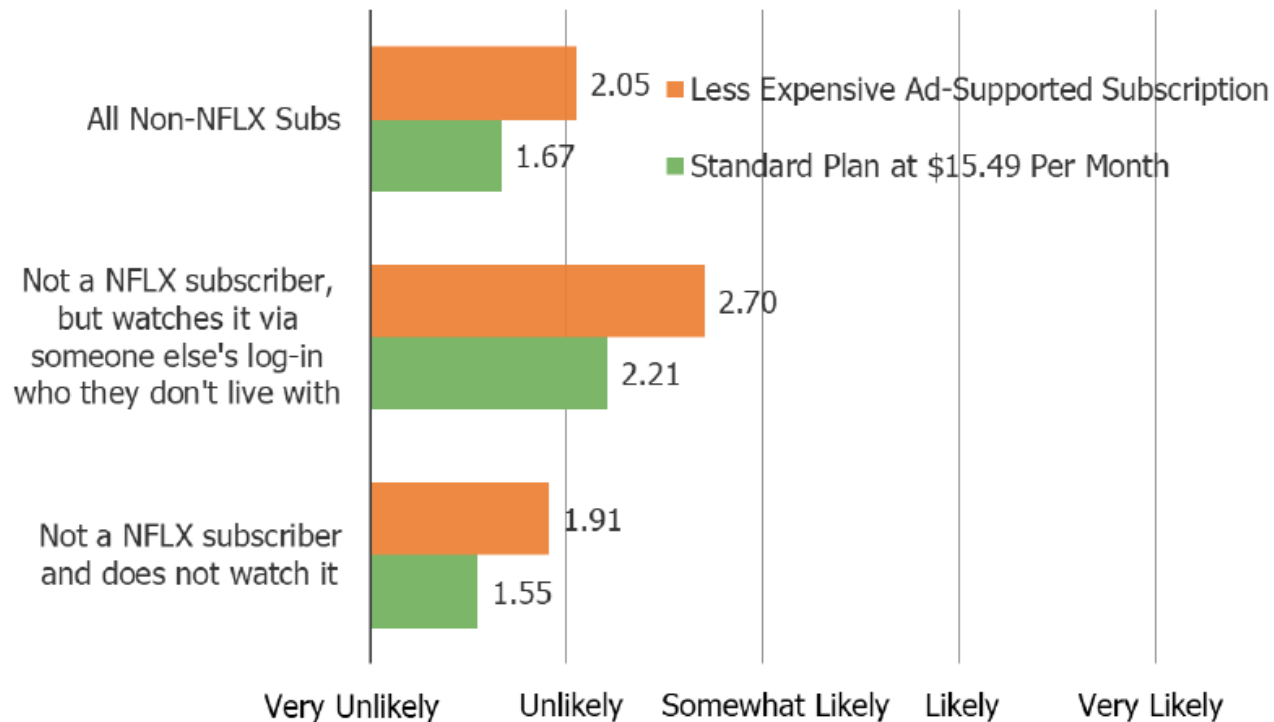


Takeaway: An ad-supported tier will drive some incremental subs among those who don't currently have paid Netflix subscriptions.

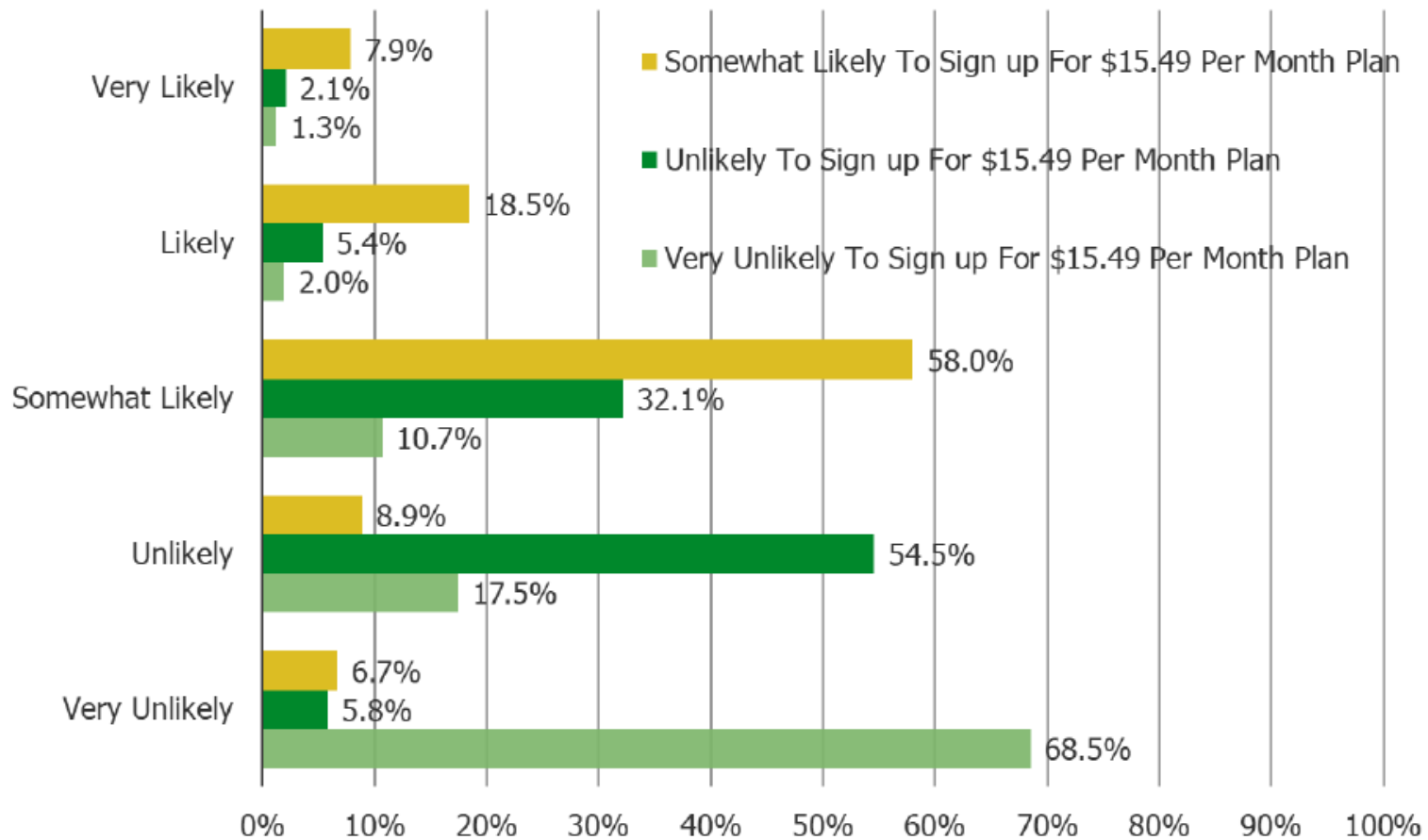
Likelihood of signing up for Netflix | Standard Plan at \$15.49 Per Month vs. Less Expensive Ad-Supported Subscription

Posed to all respondents who are not Netflix subscribers, with cross-tabs based on whether they watch NFLX or not via someone else's login who they do not live with. (N=4140)



Takeaway: An ad-supported tier will drive some incremental subs among those who don't currently have paid Netflix subscriptions.

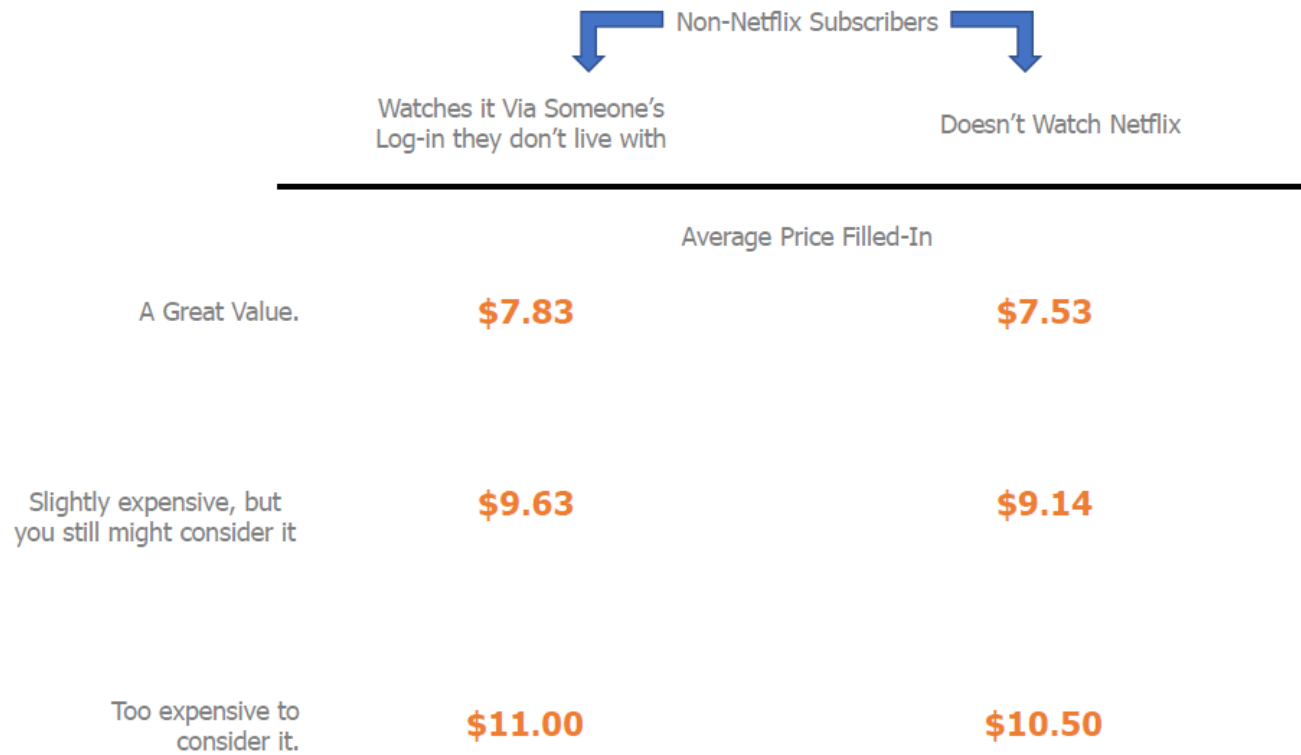
Incremental Demand Cross-Tabs: Isolating Non NFLX Subs Who Are Very Unlikely, Unlikely, or Somewhat Likely to pay \$15.49 per month for Netflix <> Showing how likely they would be to sign up for a lower priced ad-supported tier.



Takeaway: An ad-supported tier will drive some incremental subs among those who don't currently have paid Netflix subscriptions.

Netflix's standard plan currently costs \$15.49 per month. If Netflix were to launch a cheaper ad-supported plan, what price would you think would be...

Posed to all respondents. (N=7056)



*Fill-ins were capped at \$15.49: ie, respondents who filled in a value above \$15.49 were removed from analysis.

Takeaway: An ad-supported tier will drive some incremental subs among those who don't currently have paid Netflix subscriptions.

Imagine Netflix launched an ad-supported subscription tier today in which you can subscribe to Netflix (with commercials/ads), how likely would you be to sign up for it this year at the following prices?

Posed to all respondents who are not Netflix subscribers. (N=4140)

