

BESPOKE SURVEYS

Streaming Video Domestic, Vol 38

1000+ US Consumers Balanced to Census

CHECK BREAKDOWN:

STREAMING SECTOR TRENDS

- The number of streaming video platforms that consumers feel is appropriate to pay for monthly reached a new series high.
- The total amount that consumers view as appropriate to spend on streaming video services has edged higher this quarter and stands at series highs.

NETFLIX PRICING

Former Netflix subscribers continue to point to dissatisfaction with pricing as a top reason why they cancelled their Netflix subscription. Over time, subscriber satisfaction with pricing has waned.

COMPETITIVE DYNAMICS

Respondents continue to provide positive feedback on Netflix content. The share who say Netflix has a lot of content they need continues to outpace the share who say the same about Apple TV+, Disney+, HBO Max, and Hulu. HBO Max receives very high ratings from customers on a range of topics.

AD SUPPORTED TIERS

The median price that consumers cited as one they felt would be a “bargain” for a Netflix ad-supported tier was \$5.99. The median price they felt was starting to get expensive, but they’d still consider it, was \$10. A plurality feels the right number of commercials per hour to be 3-4. There is a balance of non-Netflix users who would be attracted to the ad-supported tier because of the price and a pocket of existing paying subscribers who would downgrade because they don’t mind commercials and feel it would be worth it to be on a cheaper plan.

OTHER NOTEWORTHY DATAPPOINTS

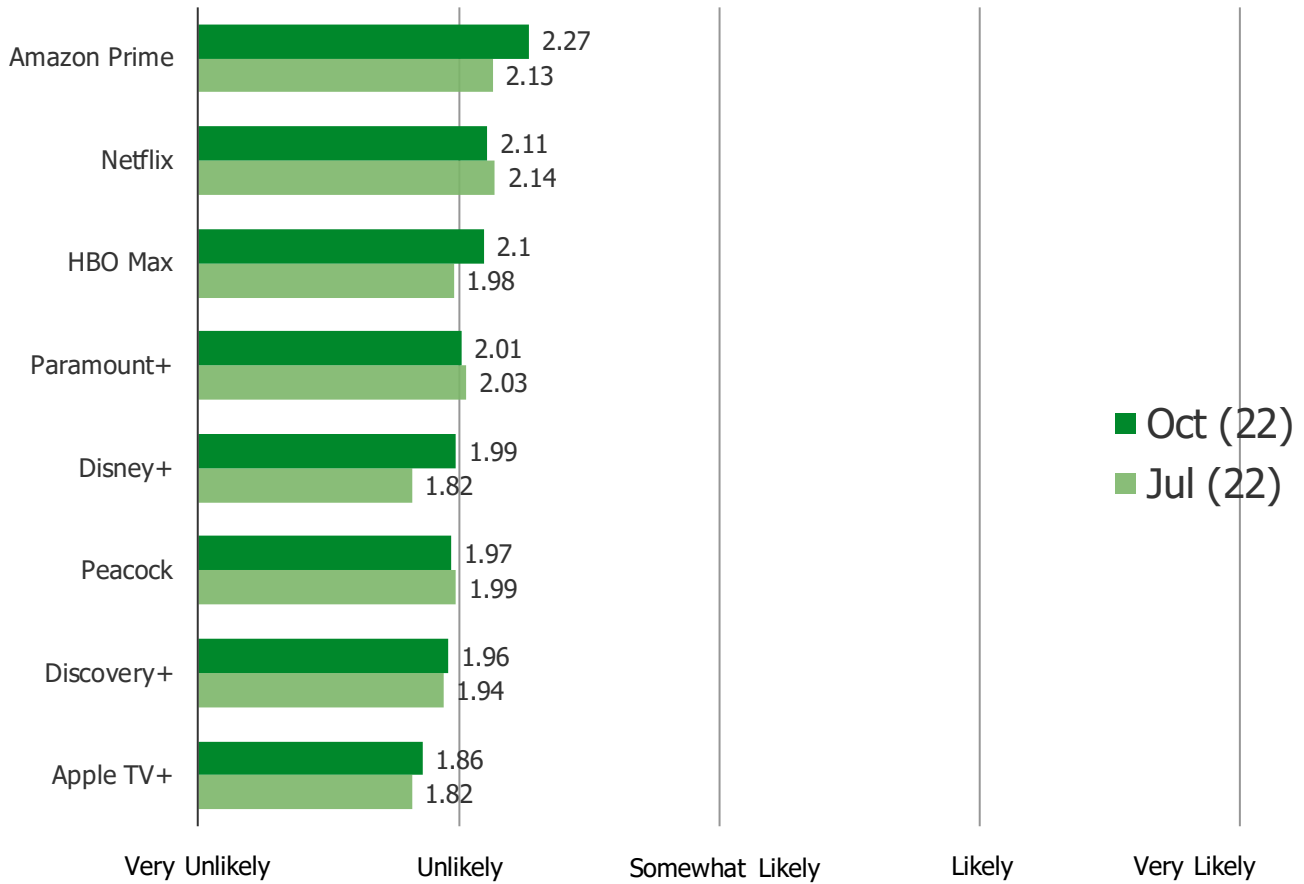
- The percentage of consumers who watch live sports has been increasing of late.
- Netflix subscriber engagement improved q/q. In recent volumes, we have noticed engagement with movies improving and tv shows worsening.
- Over the course of our survey, the % of consumers not paying for cable tv at home has grinded higher.

Streaming Wars

AD-SUPPORTED TIERS

HOW LIKELY WOULD YOU BE TO SUBSCRIBE TO AN AD-SUPPORTED VERSION OF THIS PLATFORM, WITH COMMERCIALS, FOR A LOWER PRICE THAN ITS TYPICAL SUBSCRIPTION PRICE?

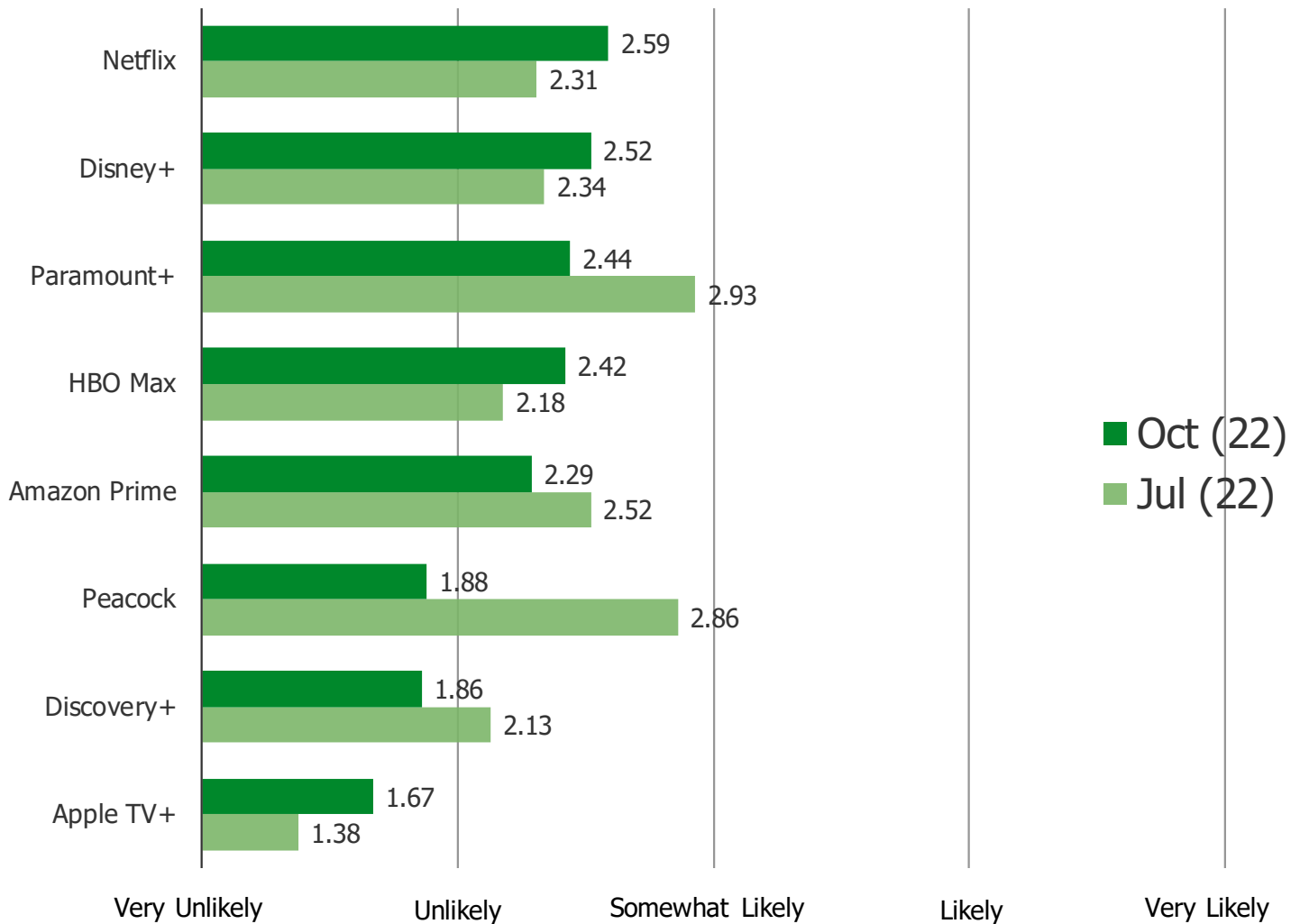
Posed to respondents who DO NOT use each of the following to watch video content at home.



	N=
Netflix	249
HBO Max	581
Amazon Prir	343
Apple TV+	741
Disney+	510
Peacock	619
Discovery+	749
Paramount+	645

HOW LIKELY WOULD YOU BE TO SIGN UP FOR YOUR OWN ACCOUNT IF THIS PLATFORM OFFERED AN AD-SUPPORTED TIER, WITH COMMERCIALS, FOR A LOWER PRICE THAN ITS TYPICAL PRICE?

Posed to respondents who access each of the following via someone’s log-in who they do not live with.

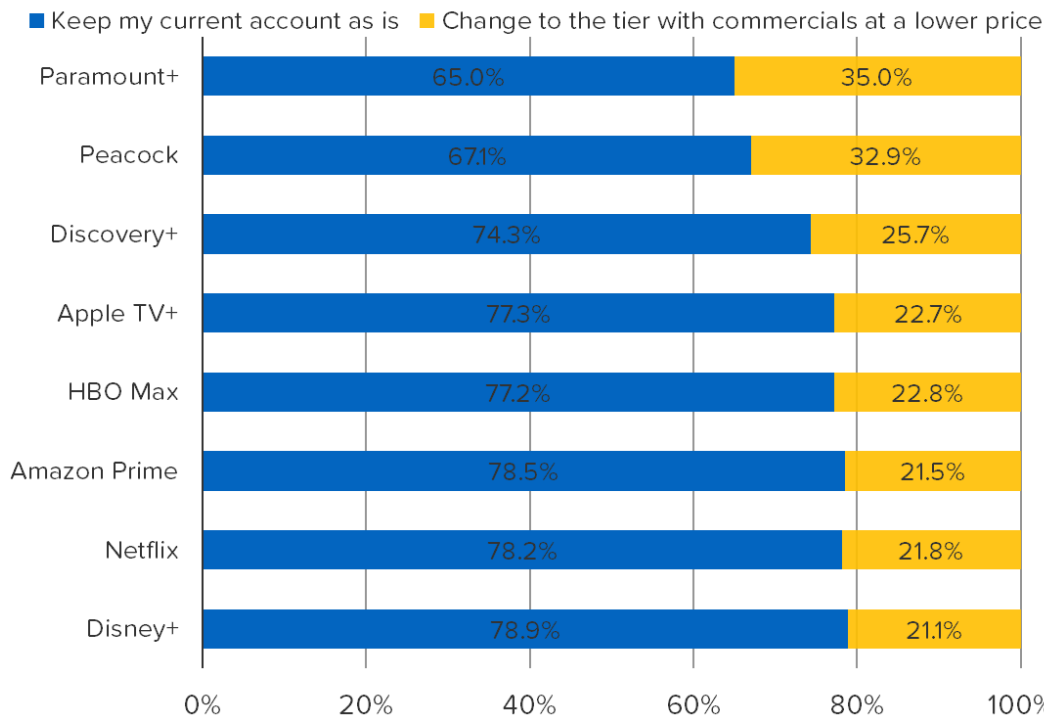


	N=
Netflix	70
HBO Max	24
Amazon Prime	31
Peacock	17
Discovery+	7
Paramount+	16
Disney+	44
Apple TV+	6

IF THE FOLLOWING OFFERED AN AD-SUPPORTED TIER, WITH COMMERCIALS, FOR A LOWER PRICE, WOULD YOU...

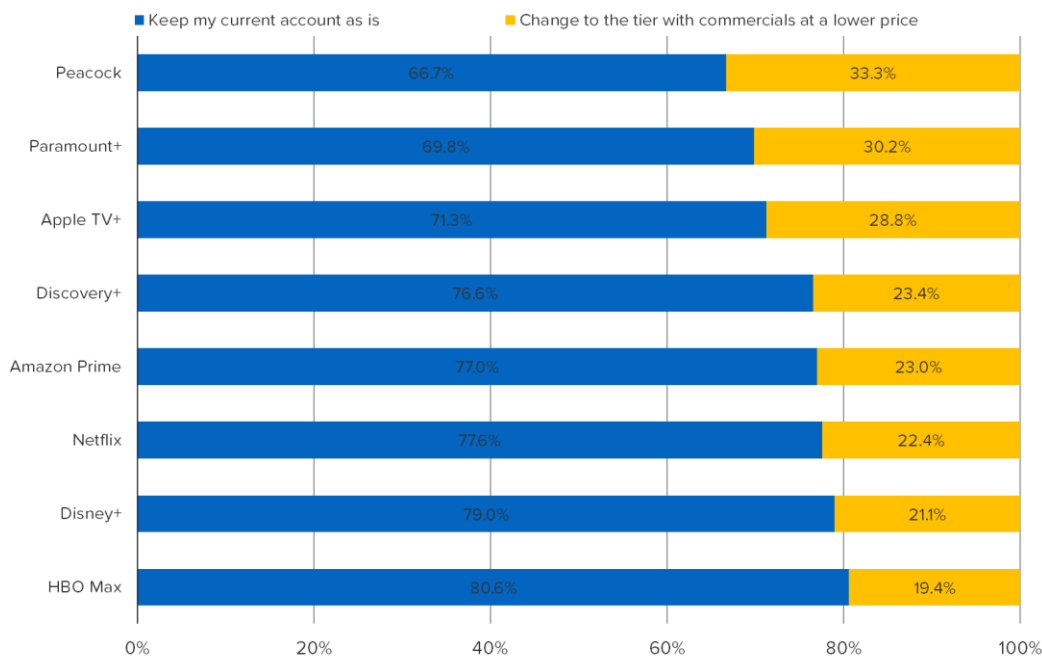
Posed to all respondents who pay for access to the following themselves.

October 2022



	N=
Netflix	422
HBO Max	202
Amazon Prime	400
Apple TV+	88
Peacock	170
Discovery+	74
Paramount+	157
Disney+	237

July 2022

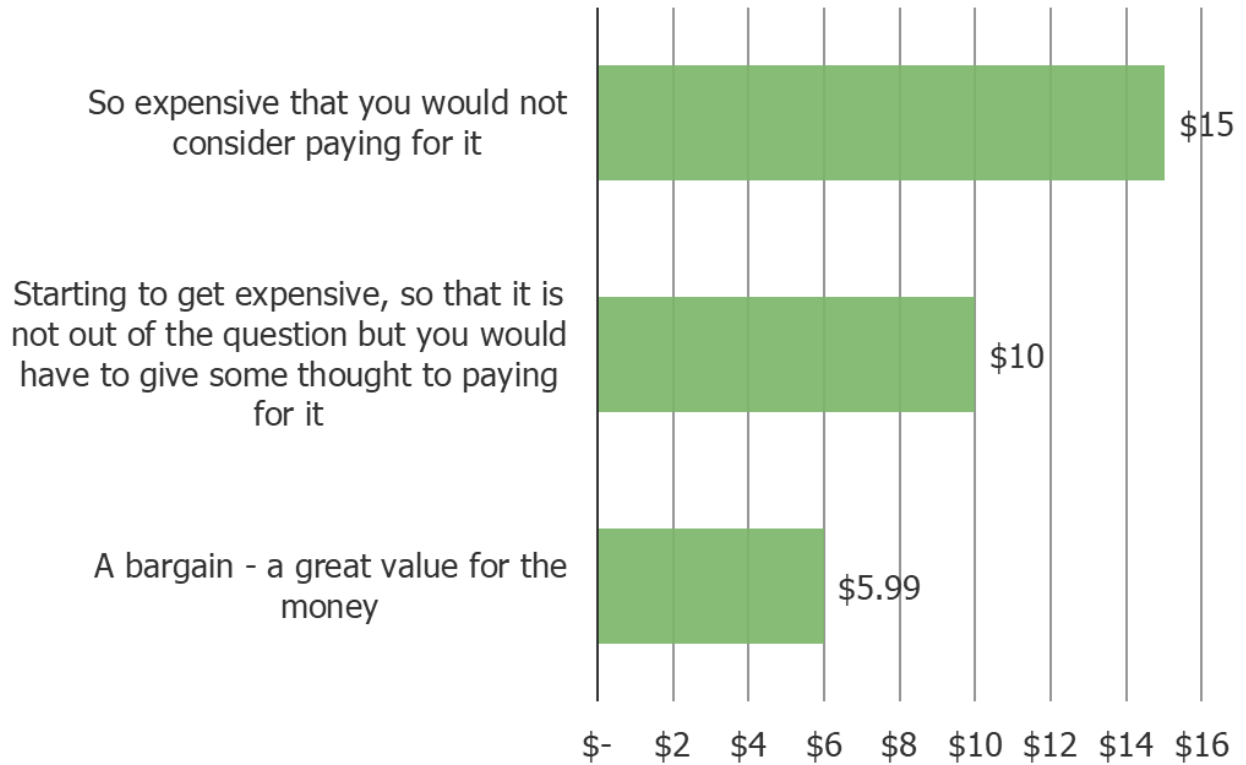


Streaming Wars

DEEPER DIVE ON NFLX AD-SUPPORTED TIER

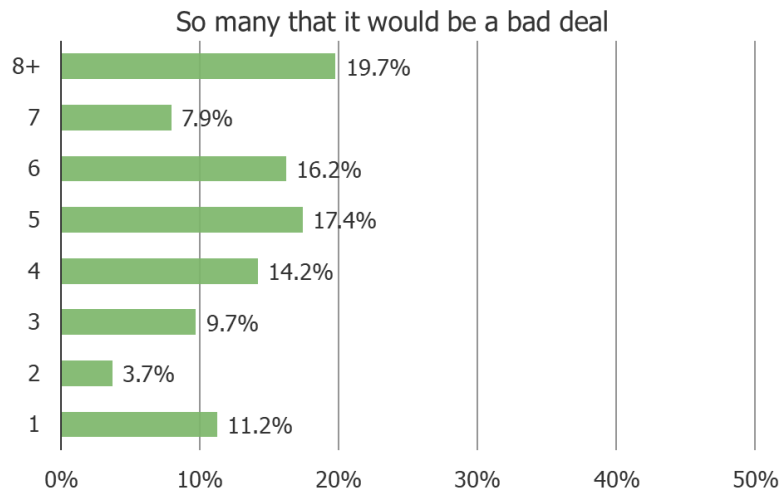
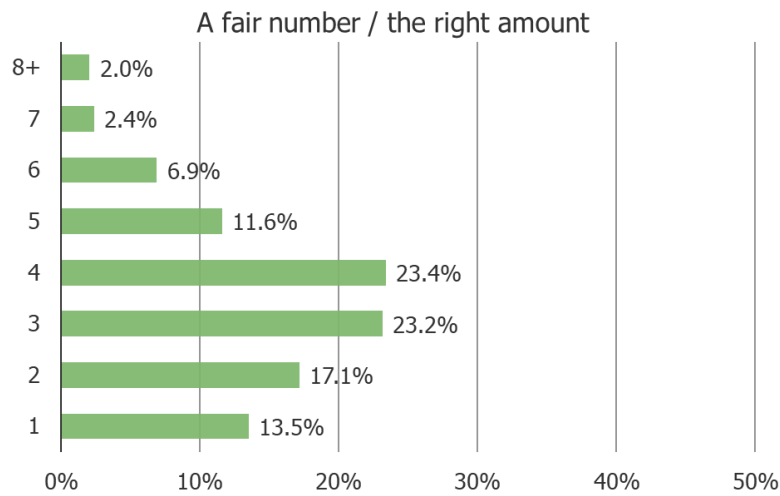
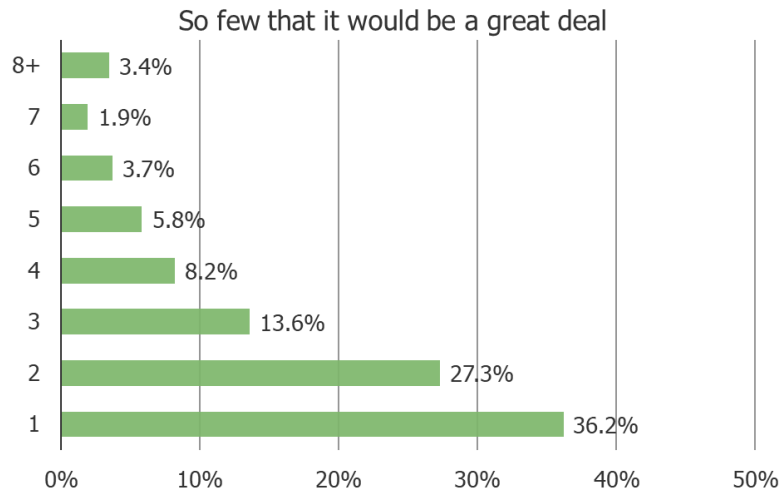
AT WHAT PRICES PER MONTH WOULD YOU CONSIDER A NETFLIX AD-SUPPORTED TIER TO BE...

Posed to respondents who watch movies and/or TV shows at home (N = 846)



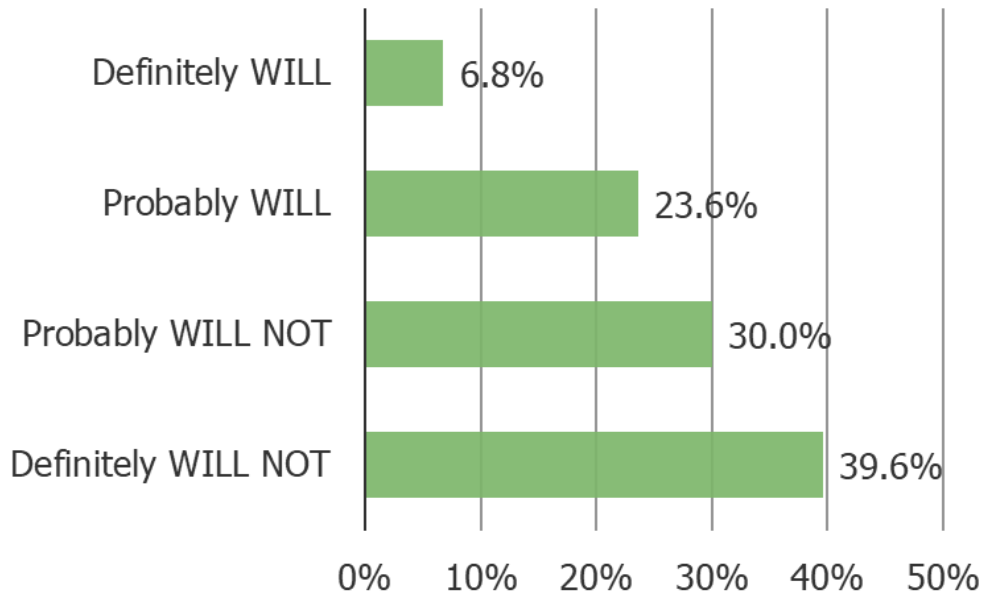
IF NETFLIX OFFERED AN AD-SUPPORTED TIER, HOW MANY COMMERCIALS PER HOUR WOULD YOU CONSIDER TO BE...

Posed to respondents who watch movies and/or TV shows at home.



IF NETFLIX LAUNCHED AN AD-SUPPORTED TIER, WITH COMMERCIALS, FOR \$7-\$9 PER MONTH, HOW LIKELY WOULD YOU BE TO SIGN UP FOR IT?

Posed to respondents who do not watch Netflix at home (N = 250)



We followed up and asked respondents who said “probably would” and “definitely would” and ask them to rate on a 0-100 scale how certain they are that they actually would.

Degree of certainty among those who said probably or definitely will (N = 76): 69/100

WHY SIGN UP FOR A NETFLIX AD-SUPPORTED TIER.

Posed to respondents who do not watch Netflix at home and said they probably/definitely would sign up for an ad-supported tier.



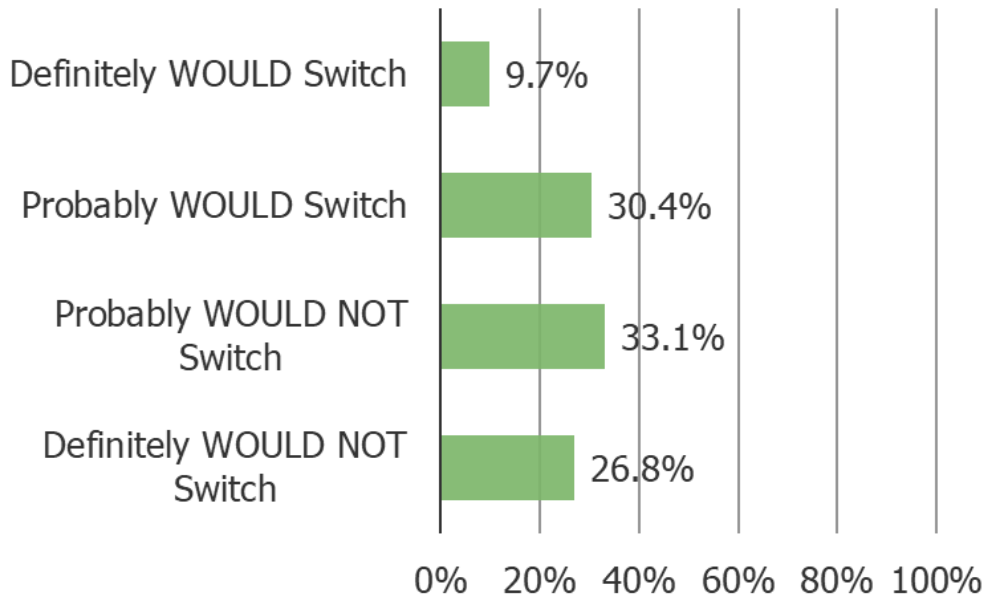
WHY NOT SIGN UP FOR A NETFLIX AD-SUPPORTED TIER.

Posed to respondents who do not watch Netflix at home and said they probably/definitely would NOT sign up for an ad-supported tier.



IF NETFLIX INTRODUCED AN AD-SUPPORTED OFFERING, WITH COMMERCIALS, FOR \$7-\$9 PER MONTH, HOW LIKELY WOULD YOU BE TO SWITCH FROM YOUR CURRENT PLAN TO THE AD-SUPPORTED PLAN?

Posed to respondents who watch Netflix at home (N = 526).



We followed up and asked respondents who said “probably would” and “definitely would” and ask them to rate on a 0-100 scale how certain they are that they actually would.

Respondents who said definitely would (N = 51): 89/100 certainty

Respondents who said probably would (N = 160): 65/100 certainty

Streaming Wars

Audience: 1,000 US Consumers | Date: October 2022

WHY SWITCH FROM PAID TO AD-SUPPORTED?

Posed to respondents who watch Netflix at home and said they probably/definitely would downgrade.



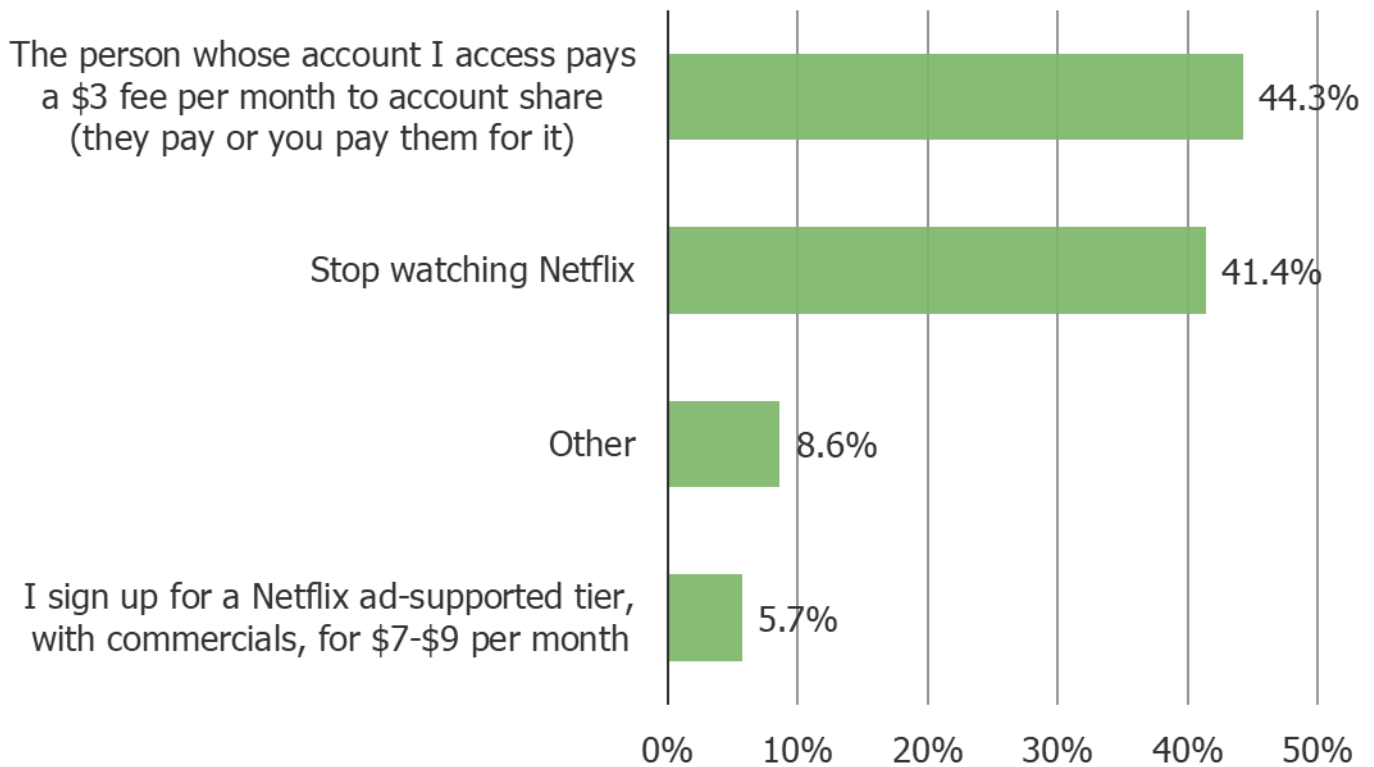
WHY NOT SWITCH FROM PAID TO AD-SUPPORTED?

Posed to respondents who watch Netflix at home and said they probably/definitely would NOT downgrade.



YOU INDICATED THAT YOU ACCESS SOMEONE'S NETFLIX ACCOUNT WHO YOU DO NOT LIVE WITH. IF NETFLIX DID NOT PERMIT YOU TO LOG-IN TO THAT ACCOUNT ANYMORE, WHICH OF THE FOLLOWING OPTIONS, IF AVAILABLE, WOULD YOU BE MOST LIKELY TO DO.

Posed to respondents who access someone's Netflix account who they do not live with.

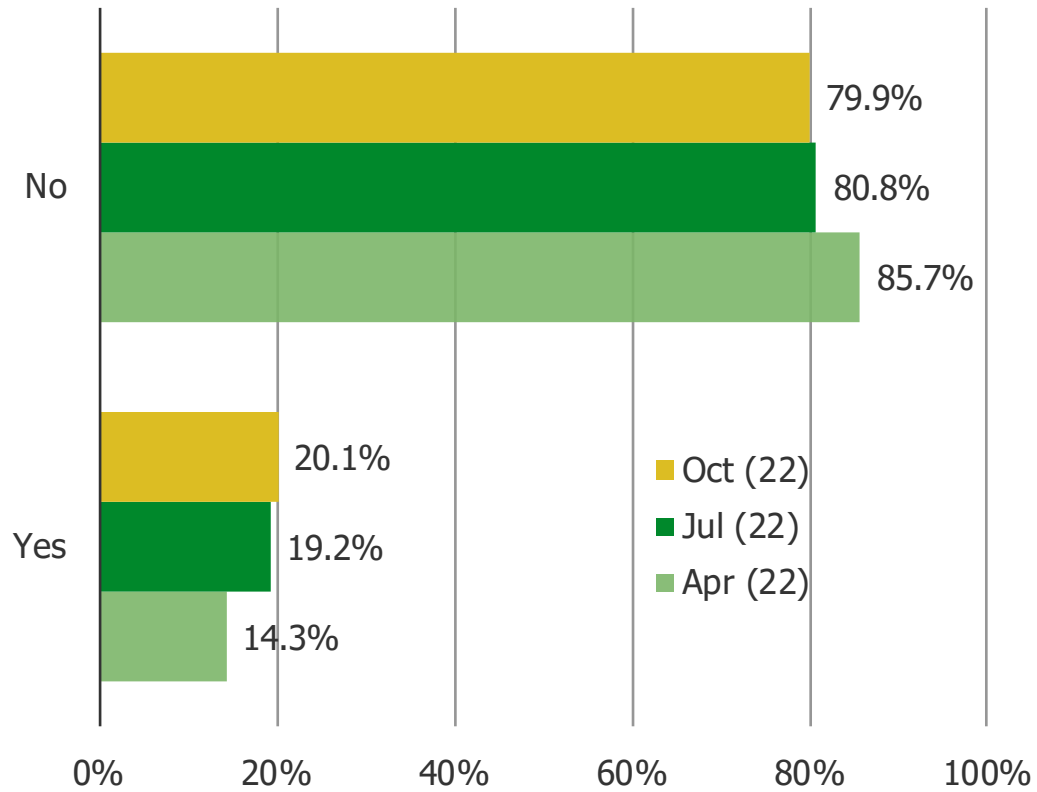


Streaming Wars

NFLX ACCOUNT SHARING AND POSSIBLE SURCHARGE

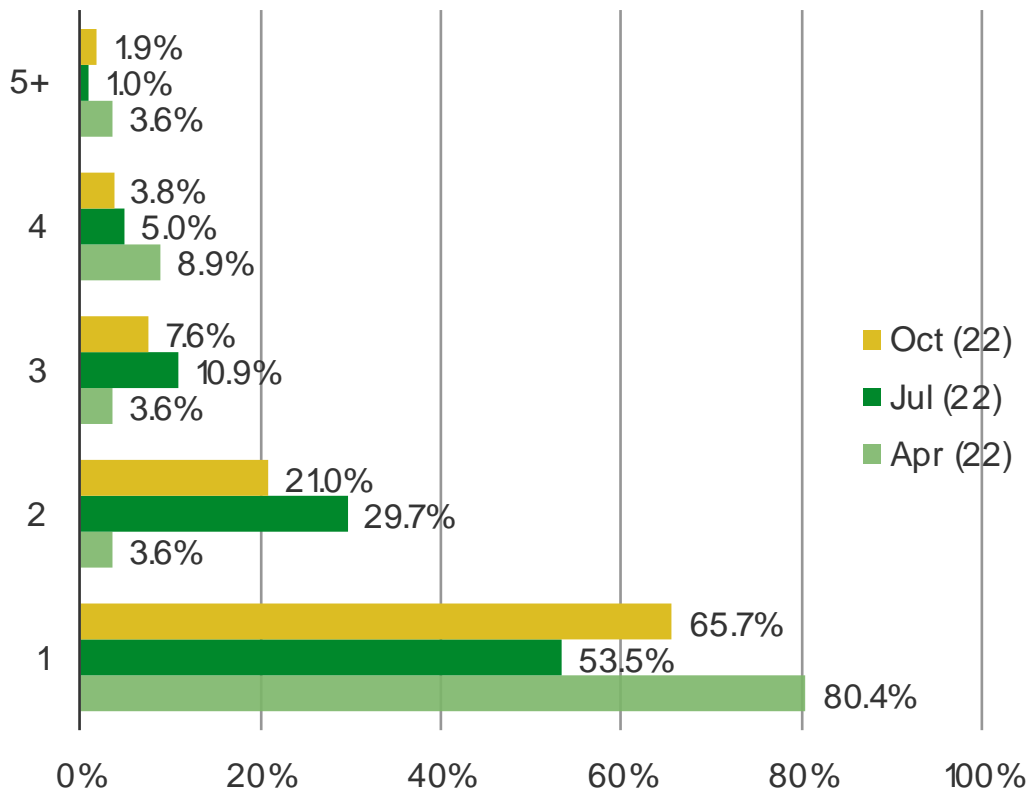
DO YOU LET ANYONE LIVING OUTSIDE OF YOUR HOUSEHOLD USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix (N=523).



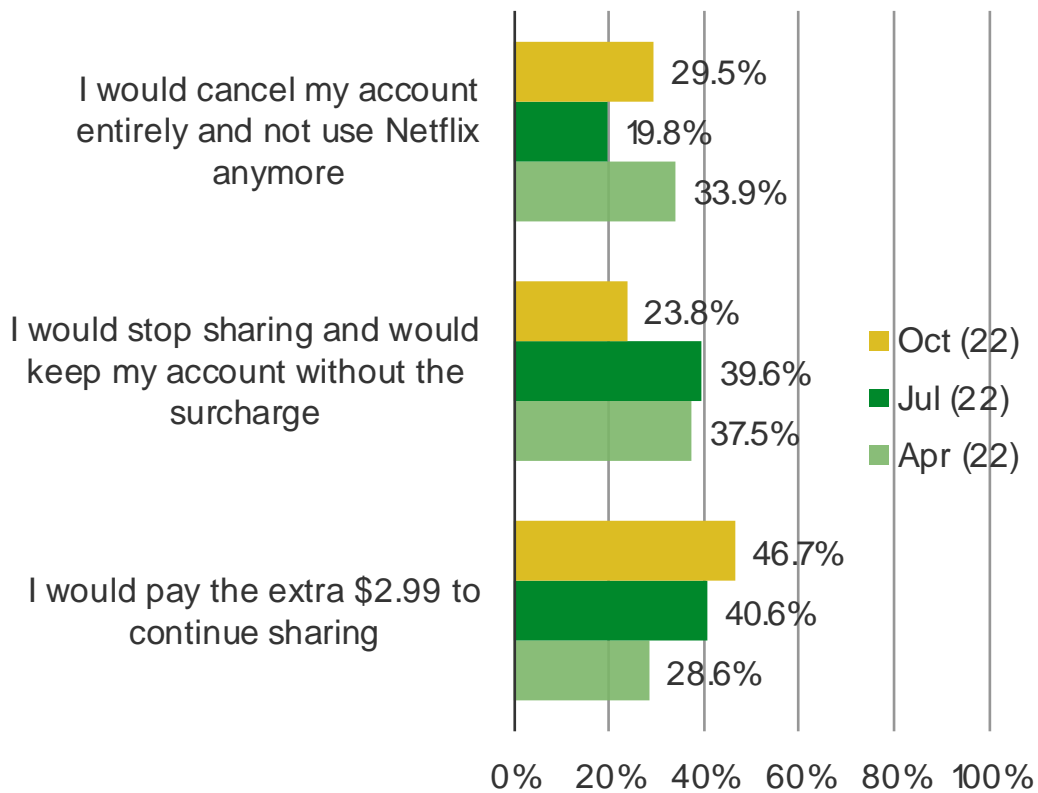
HOW MANY PEOPLE WHO LIVE OUTSIDE OF YOUR HOUSEHOLD DO YOU LET USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 105)



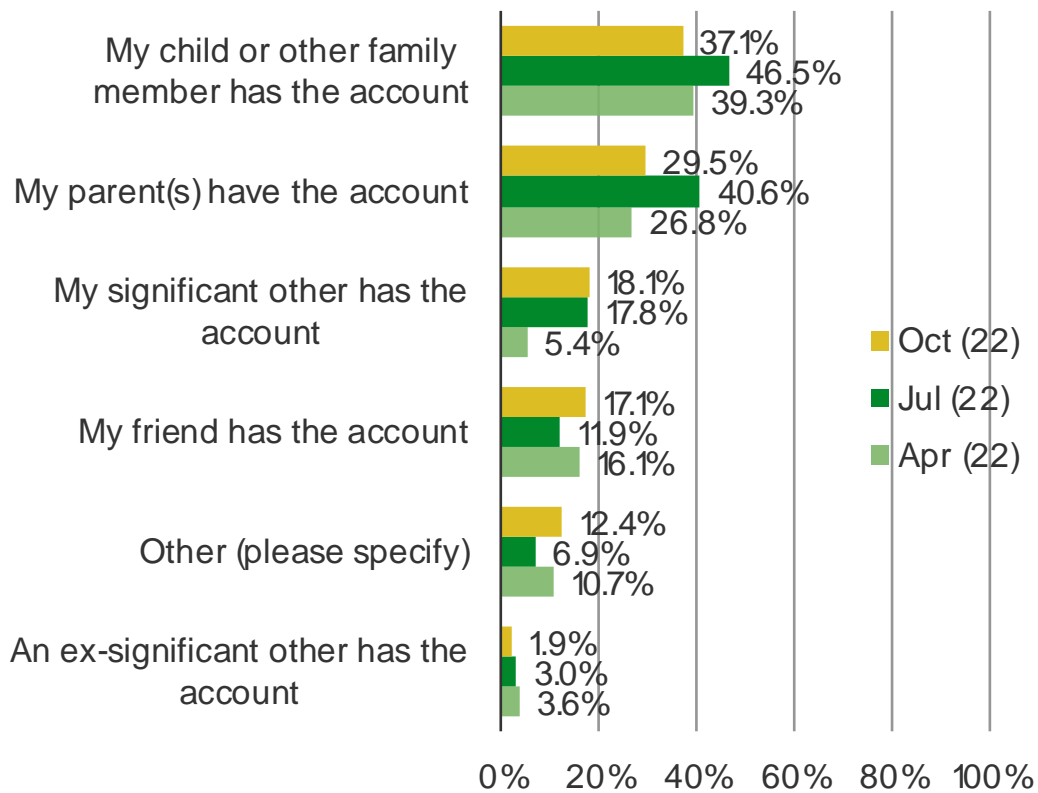
WHAT WOULD YOU DO IF NETFLIX DID NOT ALLOW YOU TO SHARE YOUR ACCOUNT WITH OTHERS AND GAVE YOU THE OPTION TO PAY A \$2.99 MONTHLY SURCHARGE TO CONTINUE SHARING?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 105).



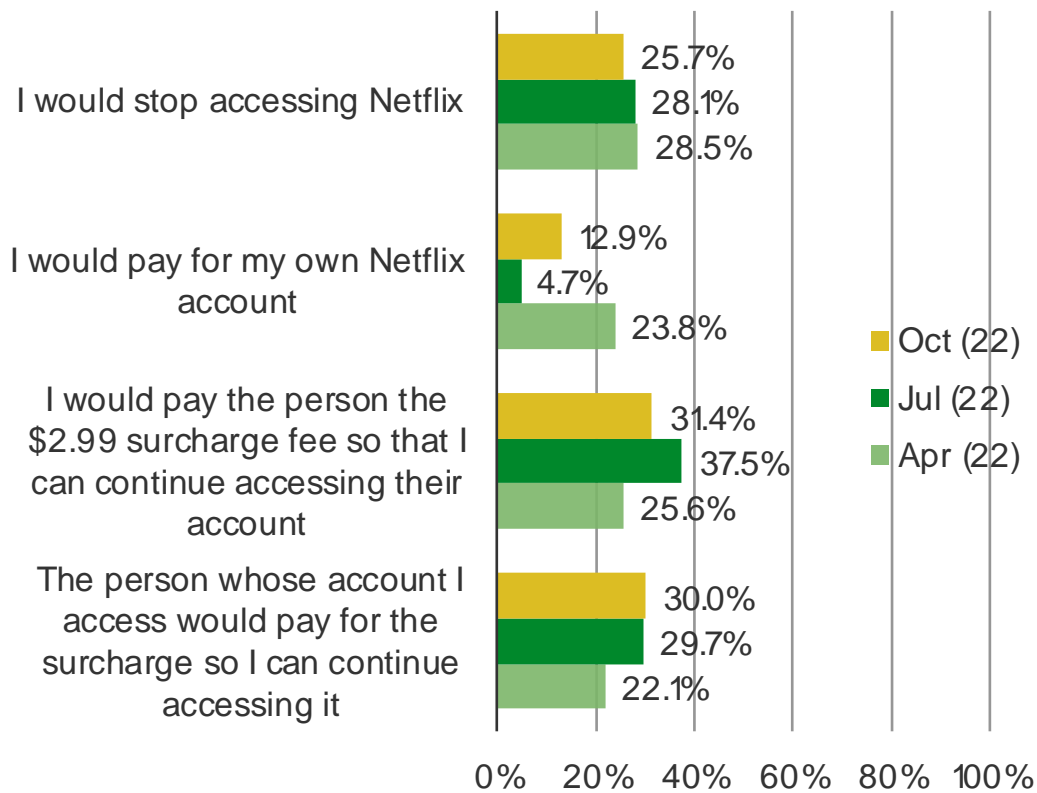
WHAT IS YOUR RELATION TO THE PERSON WHOSE NETFLIX ACCOUNT YOU ACCESS?

Posed to respondents who access someone’s Netflix account who they do not live with (N = 105).



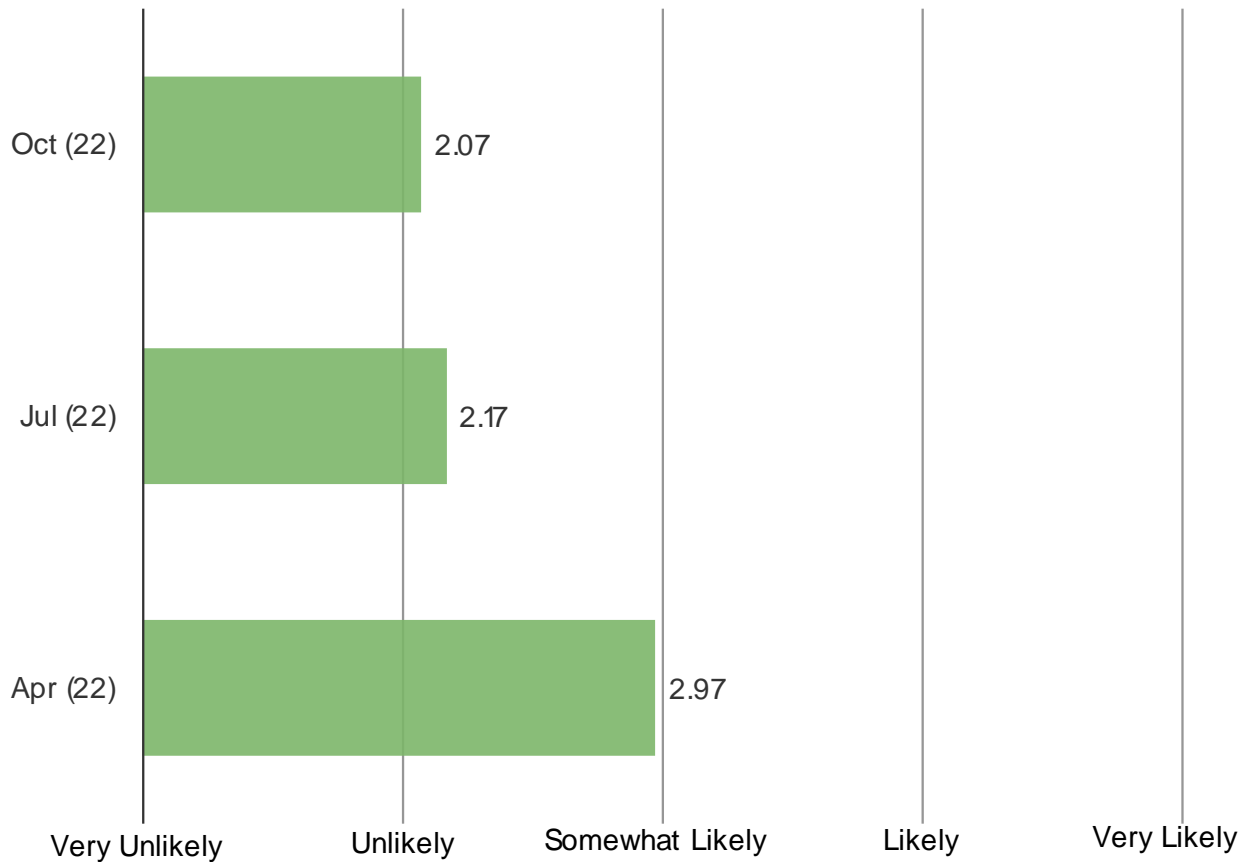
IF NETFLIX REQUIRED THE PERSON WHOSE ACCOUNT YOU ACCESS TO PAY A \$2.99 SURCHARGE FOR YOU TO ACCESS THEIR ACCOUNT, WHAT WOULD HAPPEN?

Posed to respondents who access someone’s Netflix account who they do not live with (N = 70).



IF YOU WERE NOT ABLE TO ACCESS SOMEONE ELSE'S ACCOUNT, HOW LIKELY WOULD YOU BE TO SIGN UP FOR YOUR OWN NETFLIX ACCOUNT FOR \$15.49 PER MONTH?

Posed to respondents who access someone's Netflix account who they do not live with (N = 70).

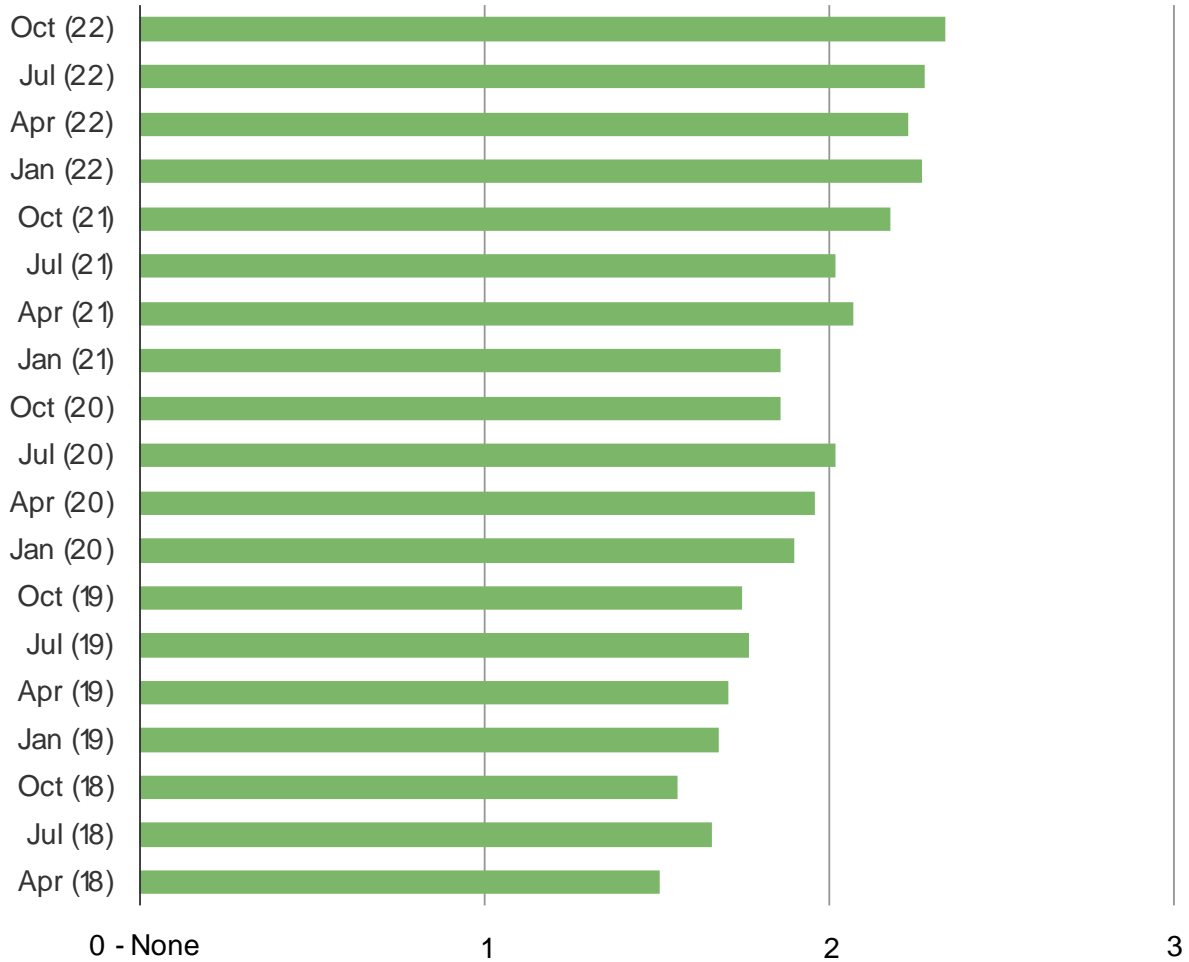


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STREAMING SECTOR DYNAMICS

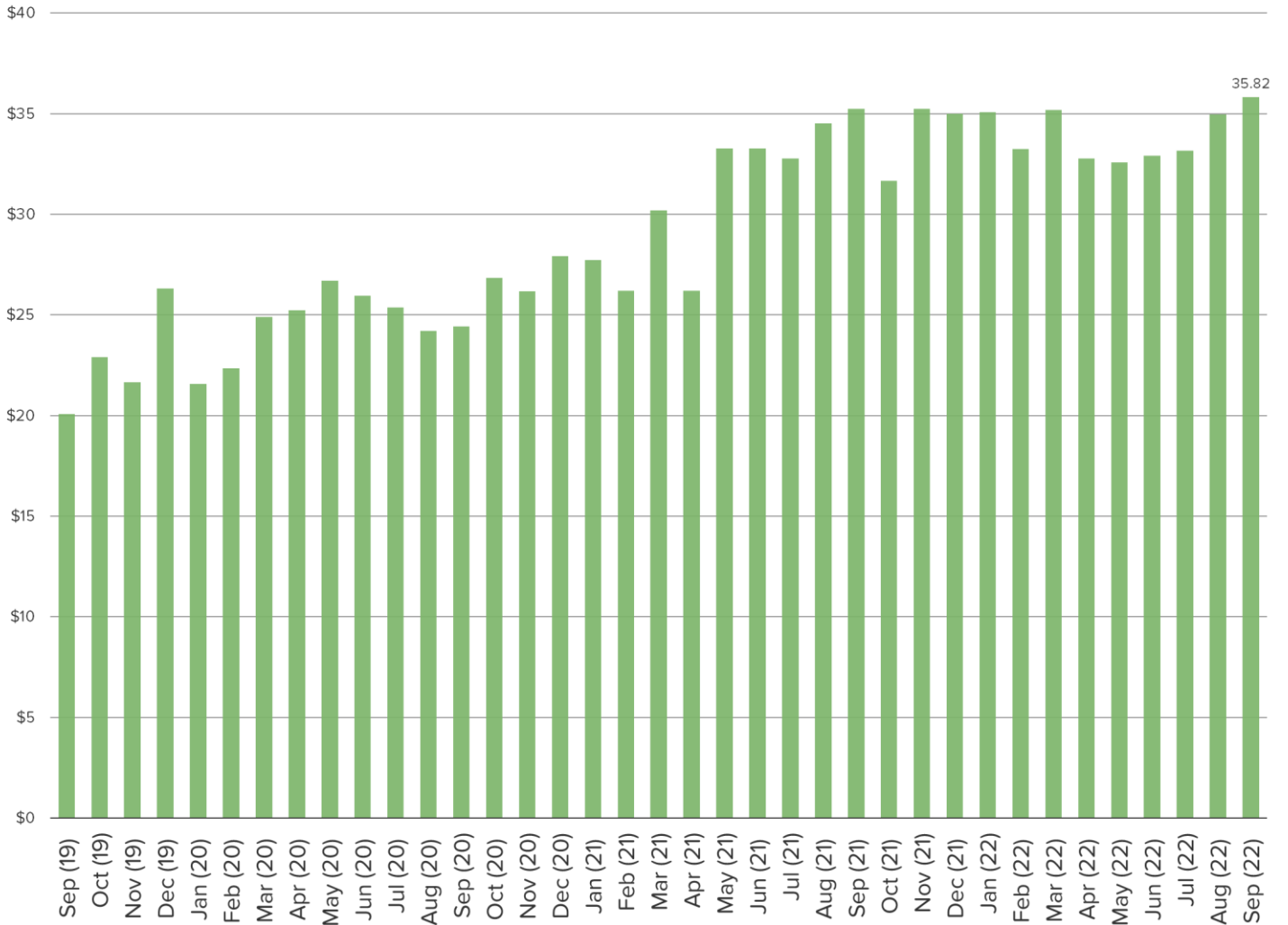
HOW MANY STREAMING VIDEO SERVICES DO YOU THINK IS THE RIGHT NUMBER TO BE PAYING FOR AT THE SAME TIME?

Posed to all respondents.



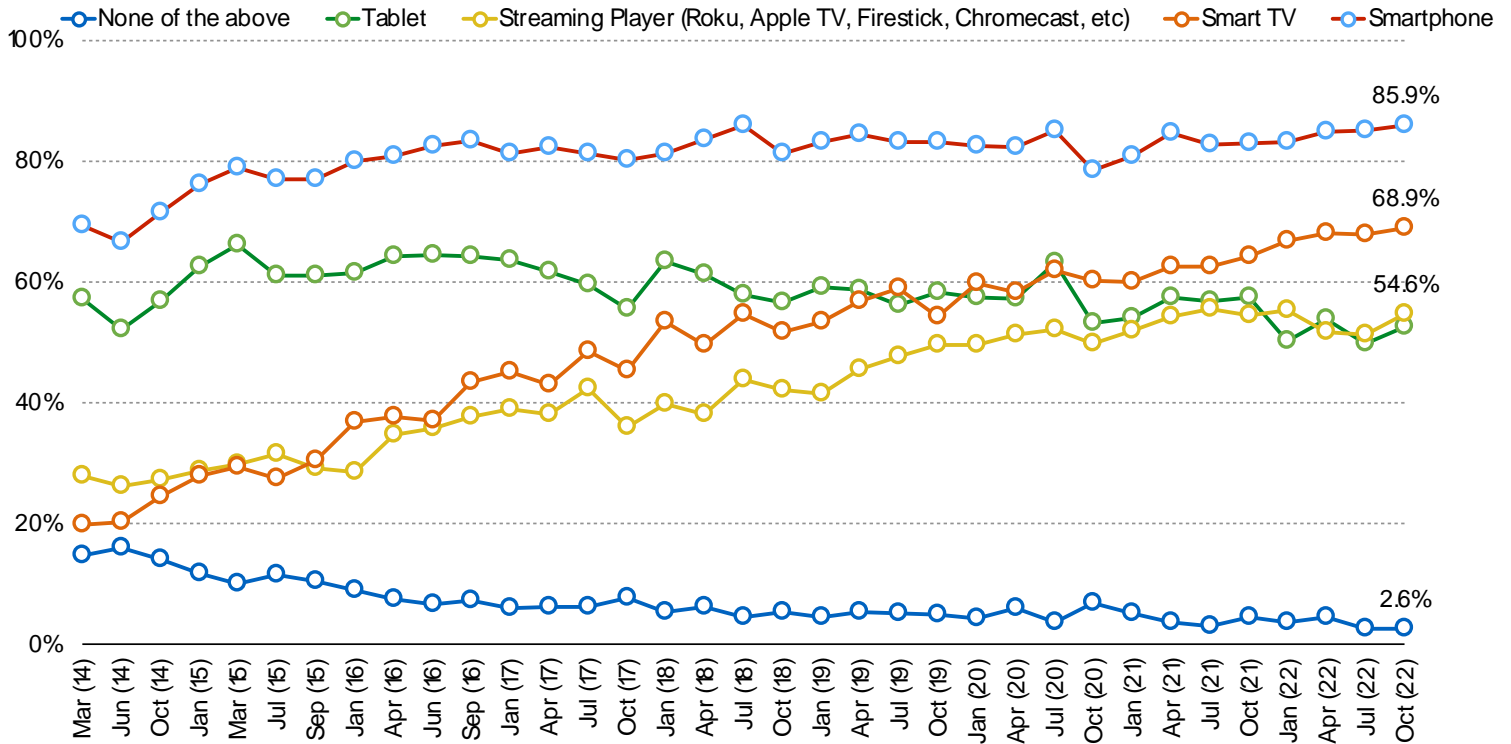
HOW MUCH DO YOU THINK IS APPROPRIATE TO SPEND ON STREAMING VIDEO SERVICES, IN TOTAL, PER MONTH?

Posed to all respondents.



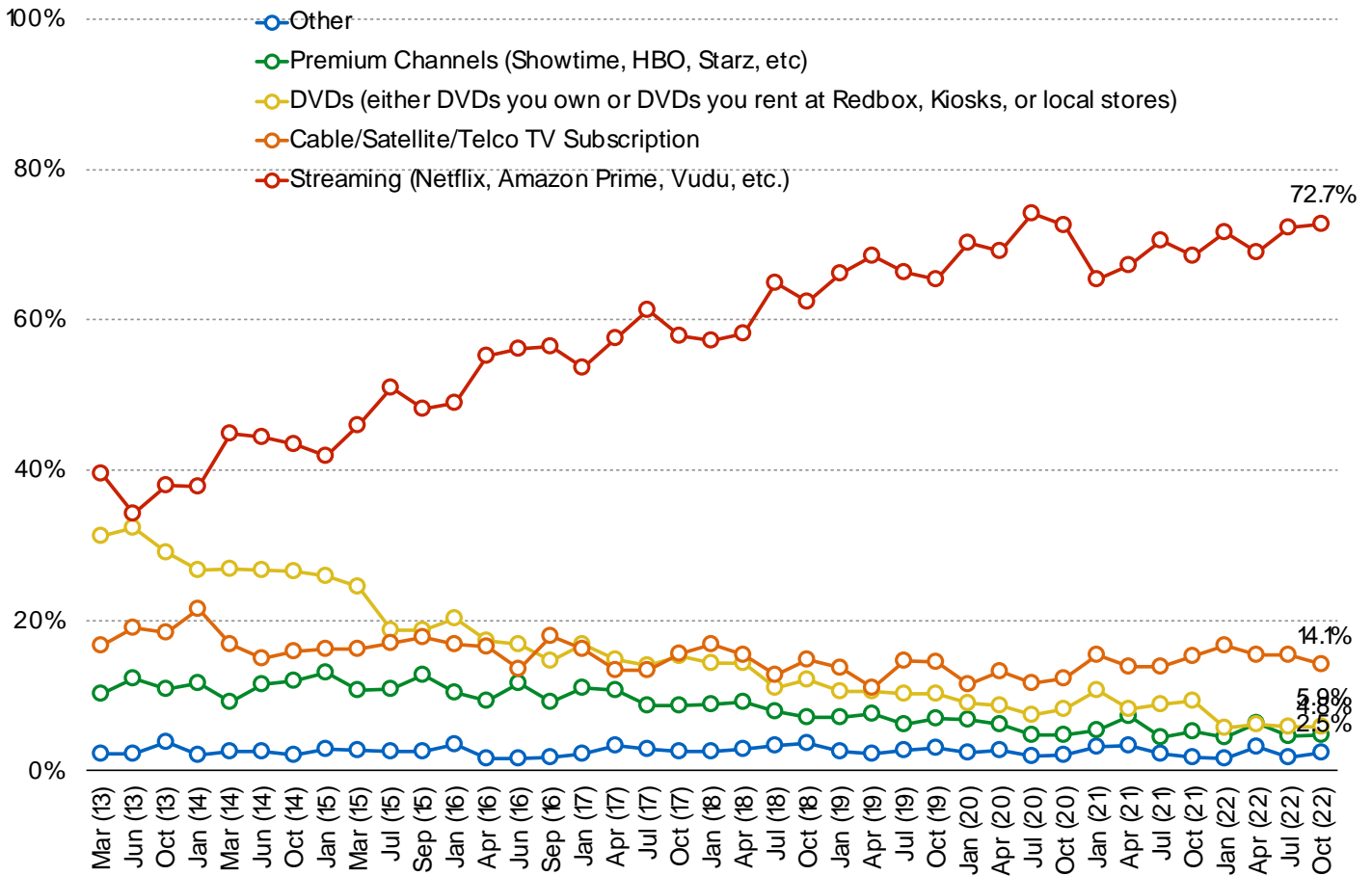
INTERNET CONNECTED DEVICES OWNED BY RESPONDENTS

This question was posed to the target audience.



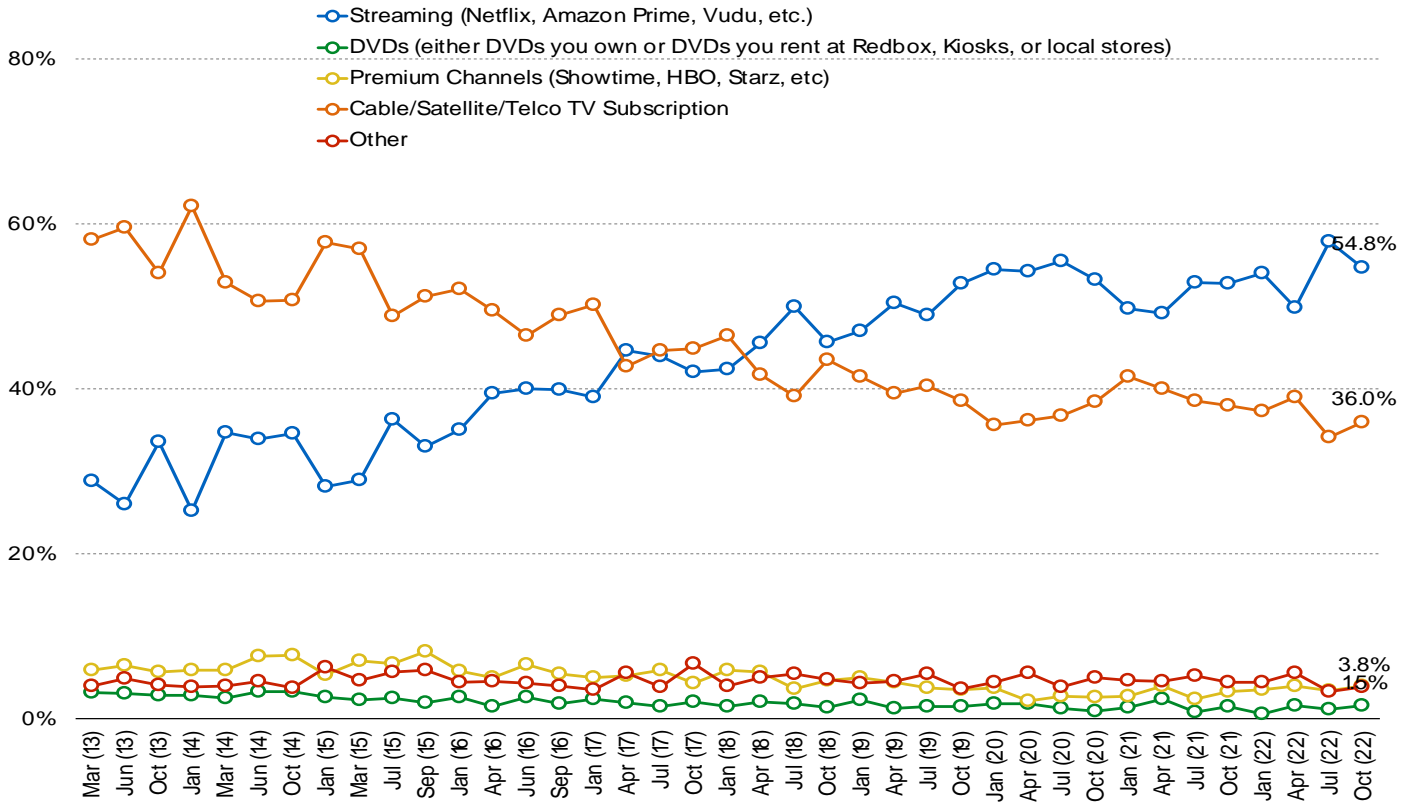
PREFERRED METHOD FOR WATCHING MOVIES

This question was posed to the target audience.



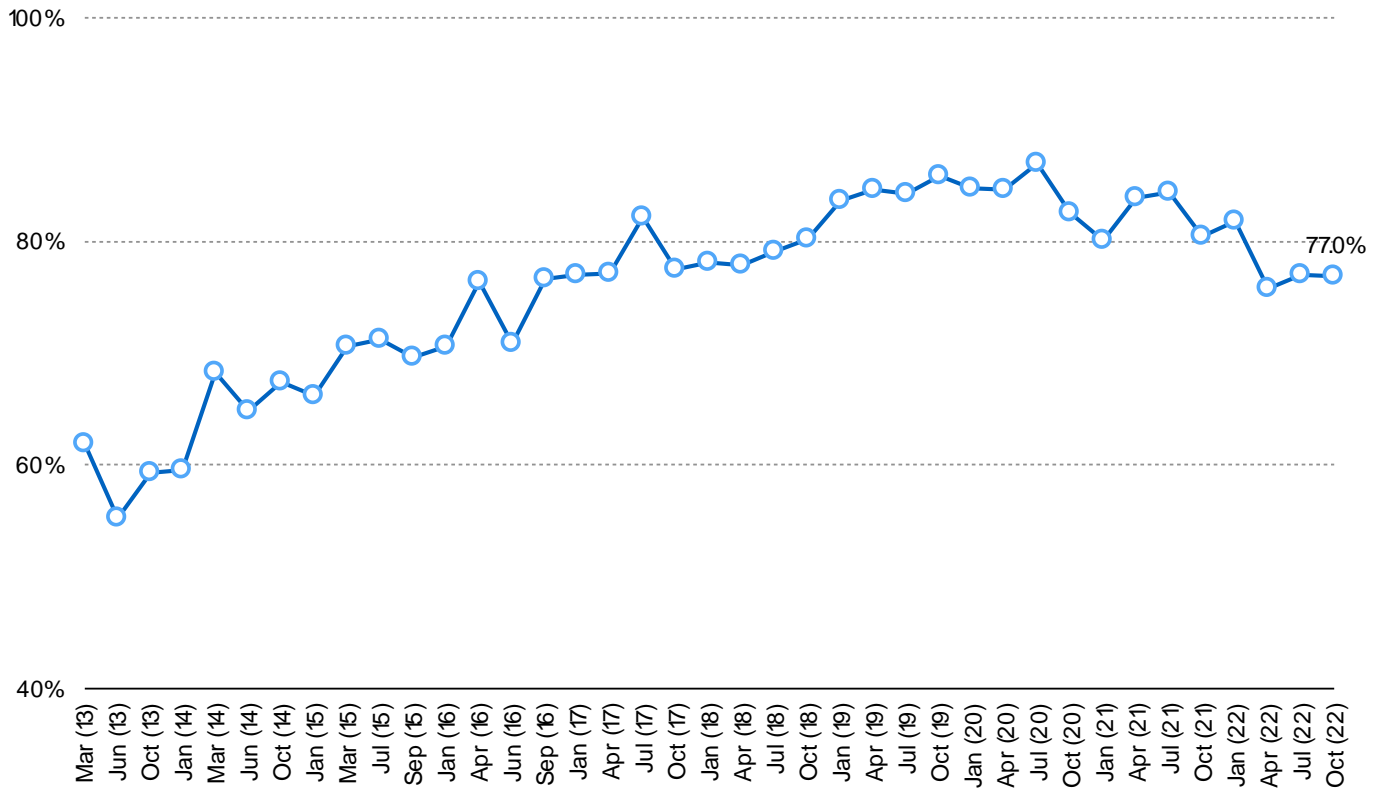
PREFERRED METHOD FOR WATCHING TELEVISION SHOWS

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.

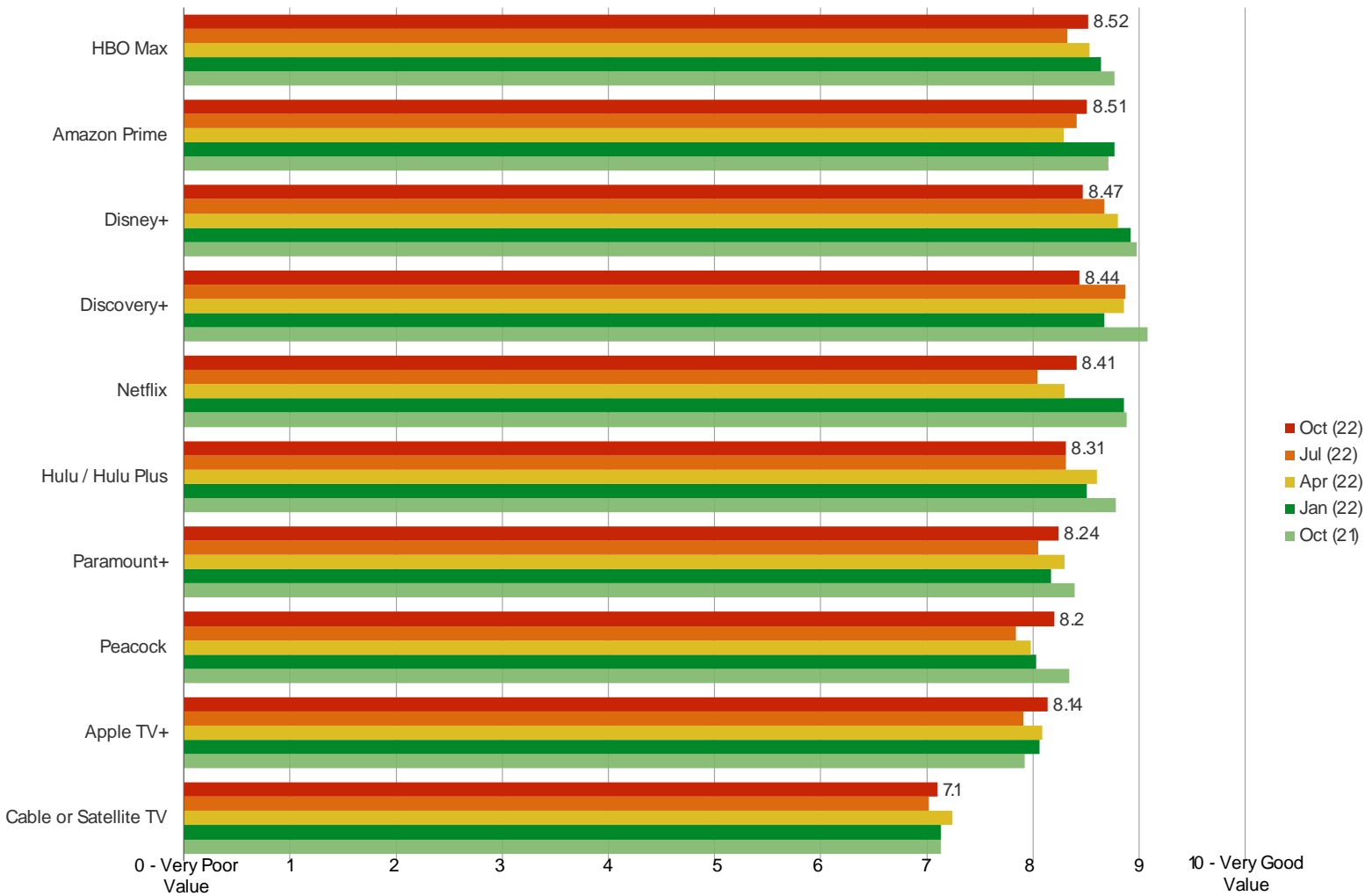


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STREAMING PLATFORMS – COMPETITIVE DYNAMICS

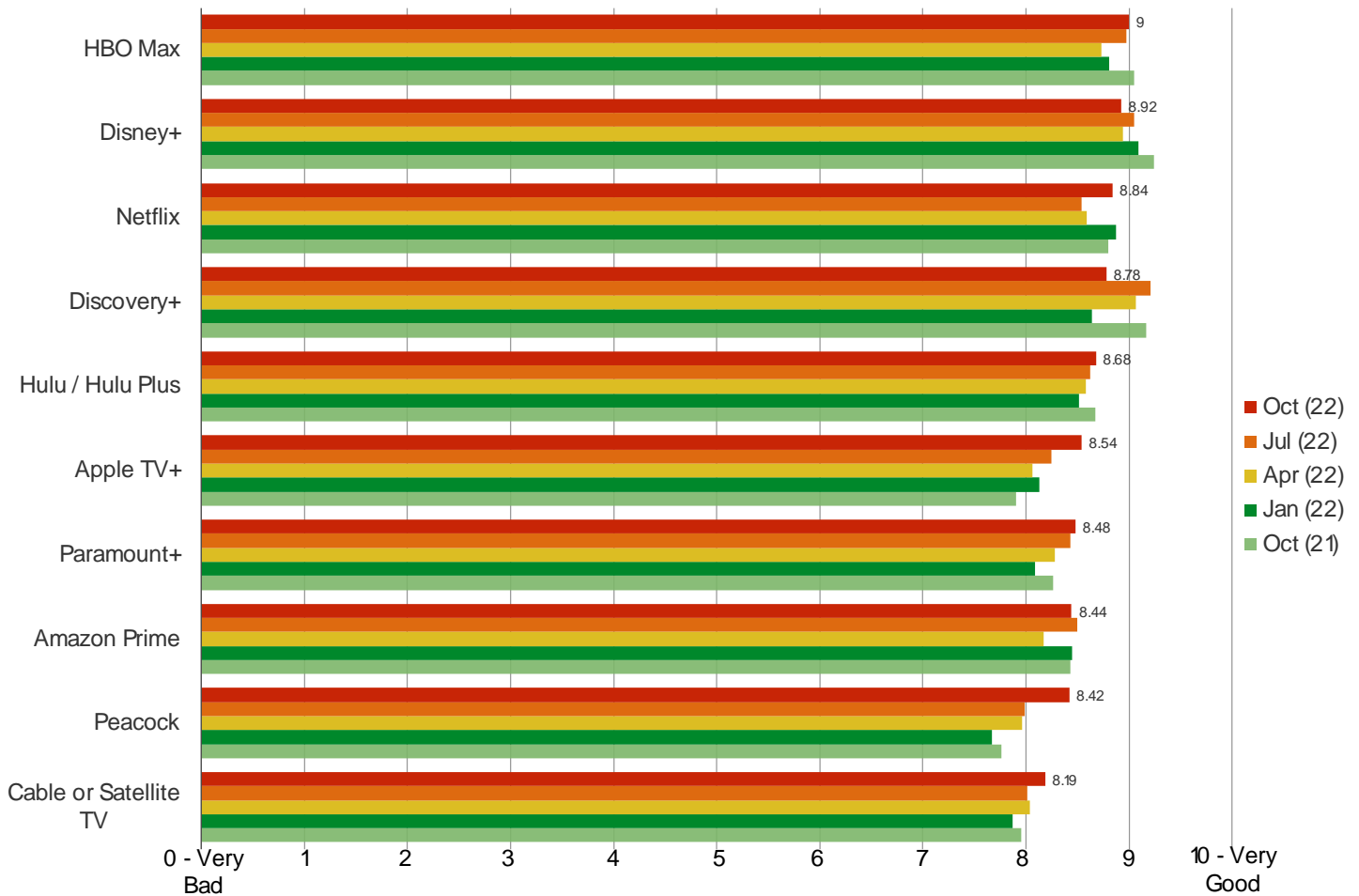
HOW WOULD YOU RATE THE VALUE THIS SERVICE OFFERS RELATIVE TO WHAT IT COSTS?

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:

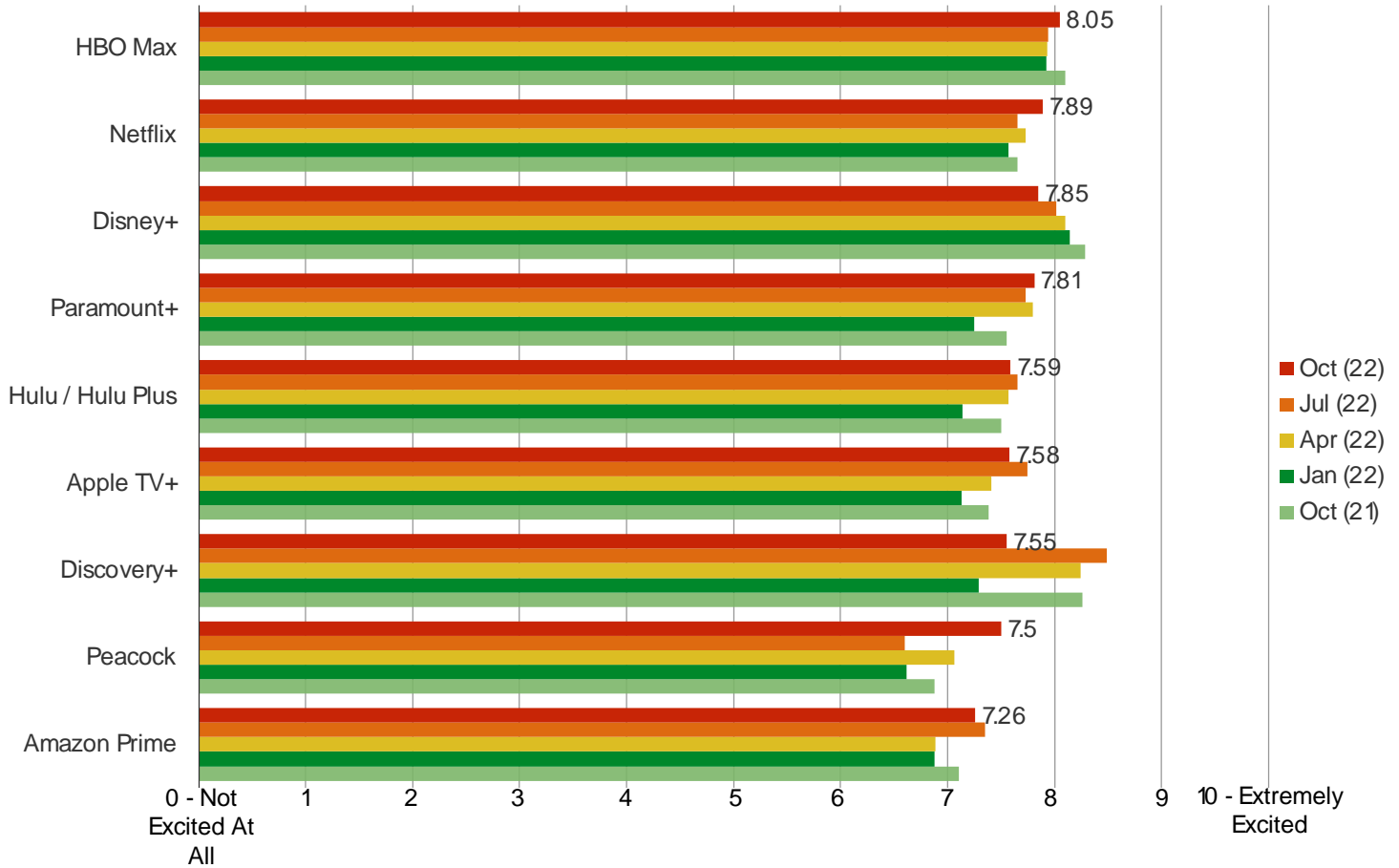
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



	N=
Netflix	523
Hulu / Hulu Plus	337
HBO Max	237
Amazon Prime	468
Apple TV+	95
Cable or Satellite TV	311
Disney+	288
Peacock	206
Discovery+	86
Paramount+	181

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

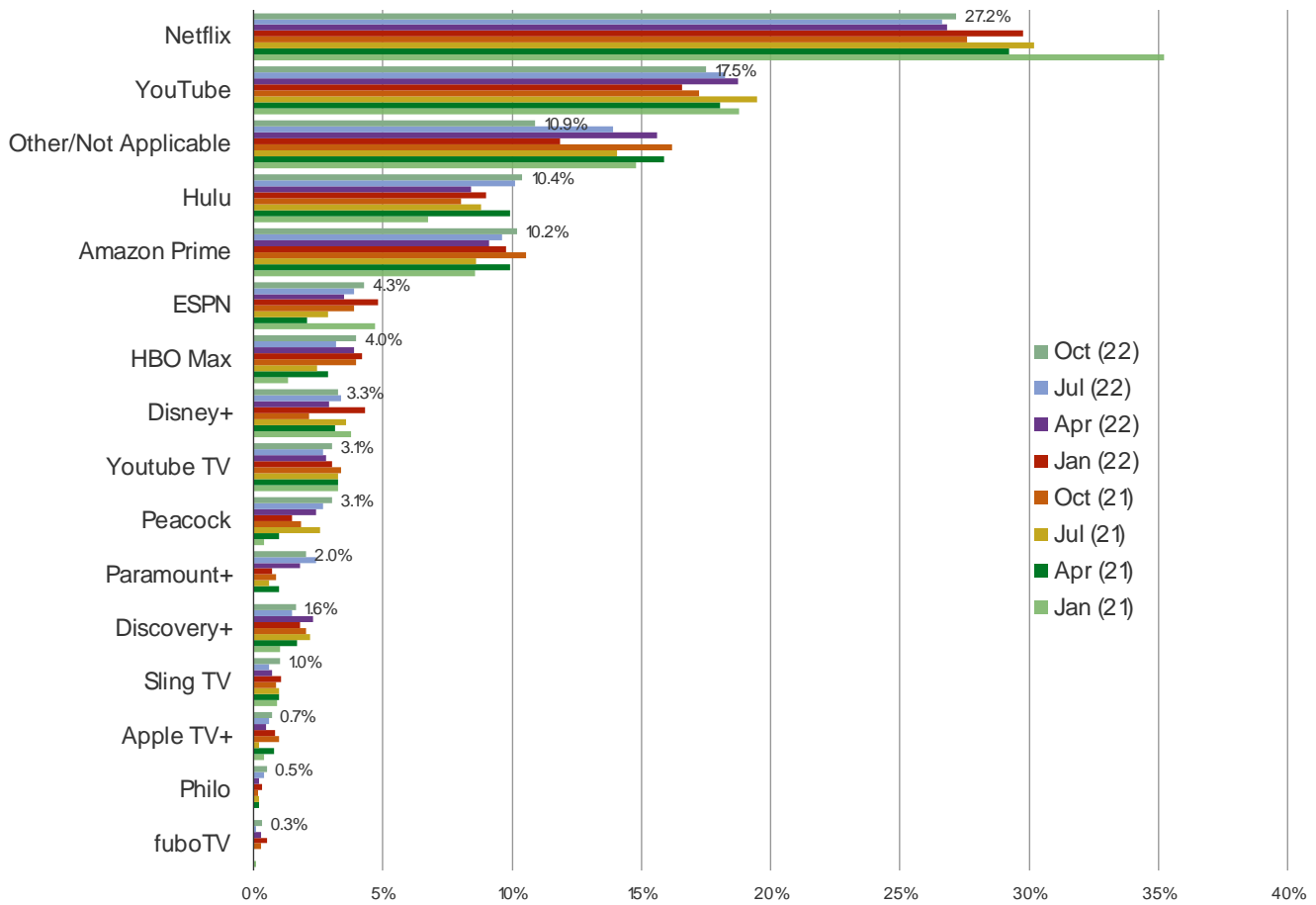
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



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Netflix	523
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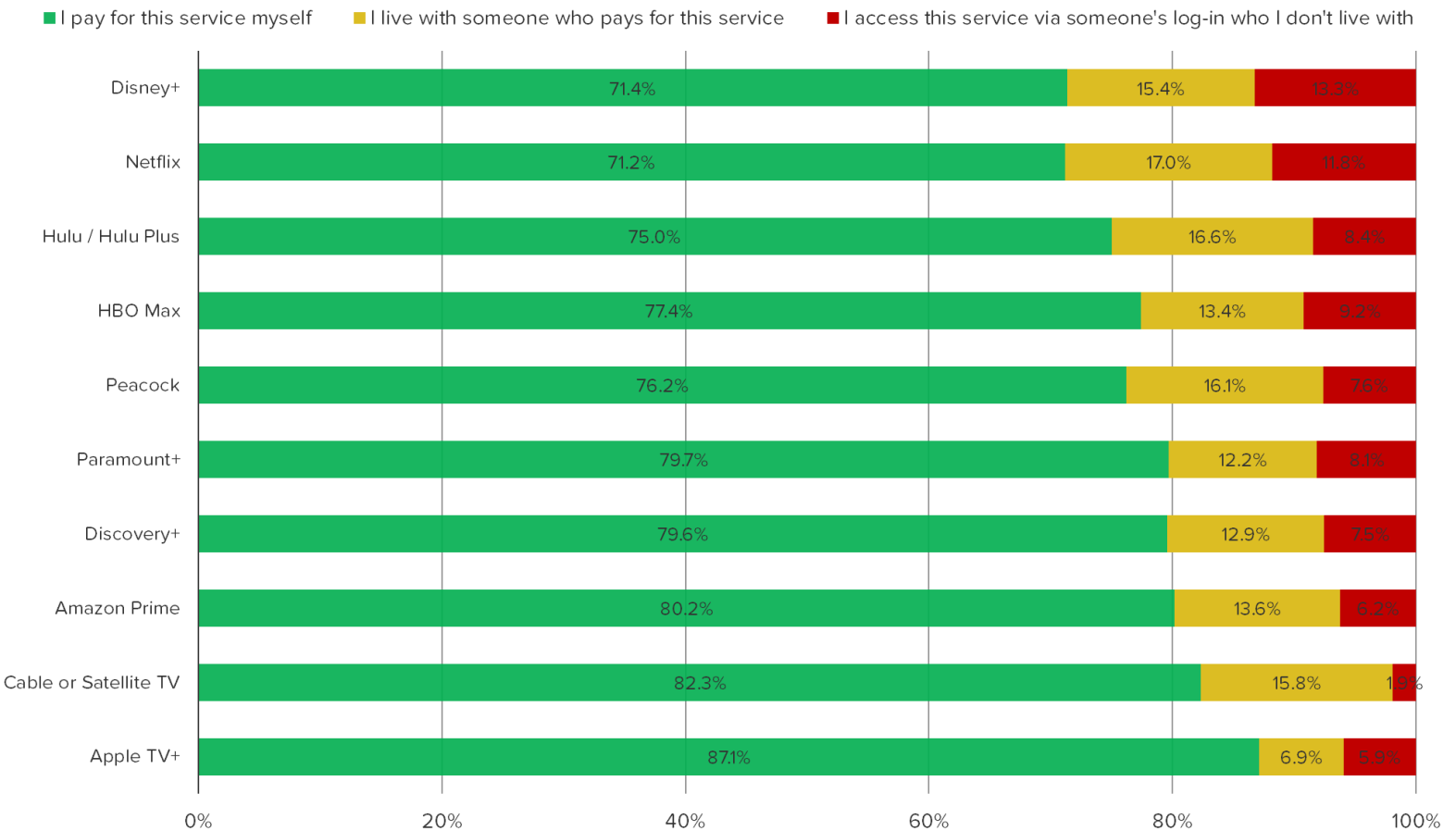
WHICH NETWORKS/SERVICES DO RESPONDENTS WATCH MOST OFTEN?

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).



WHICH BEST DESCRIBES YOUR USAGE OF THE FOLLOWING:

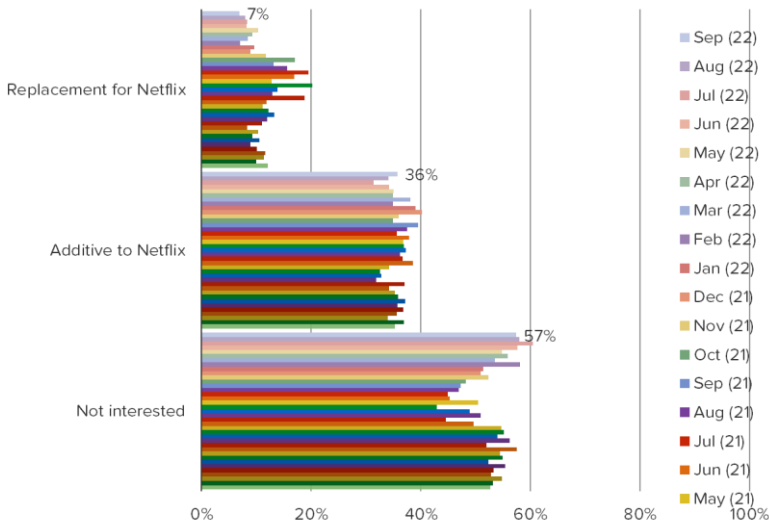
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



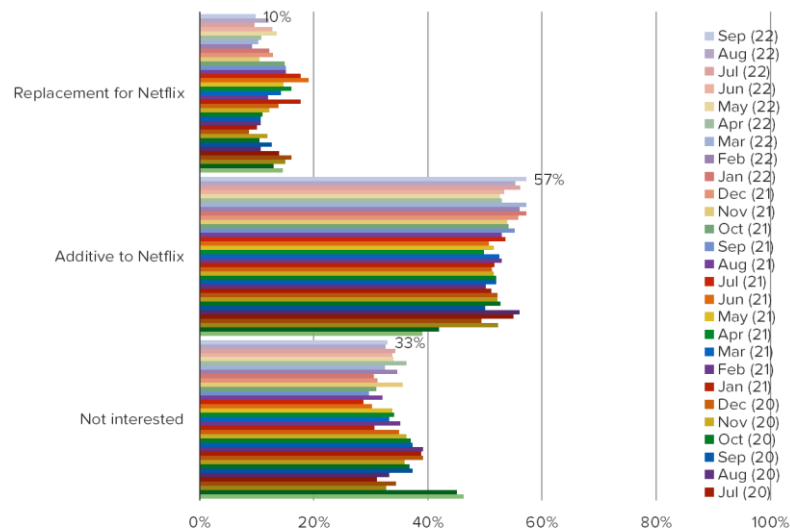
WOULD YOU VIEW THE FOLLOWING TO BE ADDITIVE OR A REPLACEMENT OF NETFLIX?

Posed to Netflix subscribers.

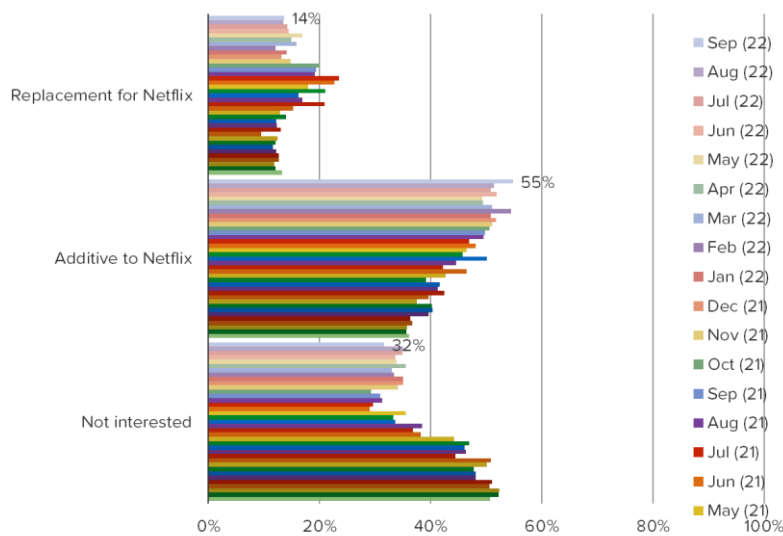
Apple TV+



Disney+



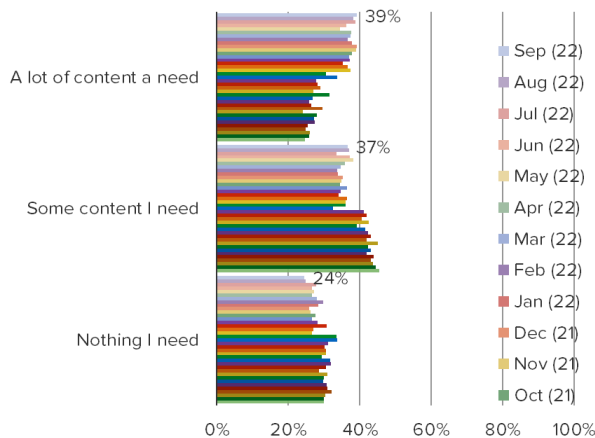
HBO Max



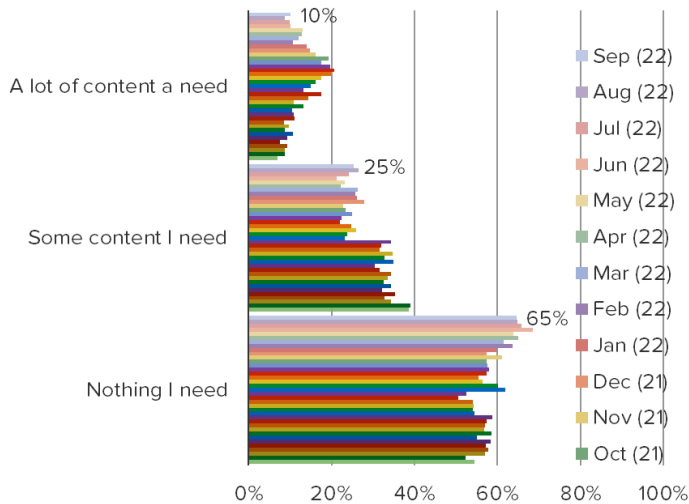
WHAT ARE YOUR EXPECTATIONS FOR THE CONTENT THAT WILL BE ON EACH OF THESE PLATFORMS GOING FORWARD?

Posed to all respondents.

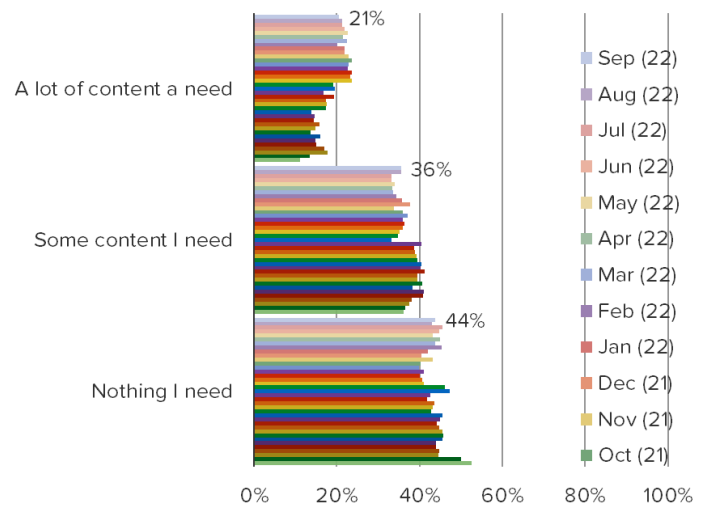
Netflix



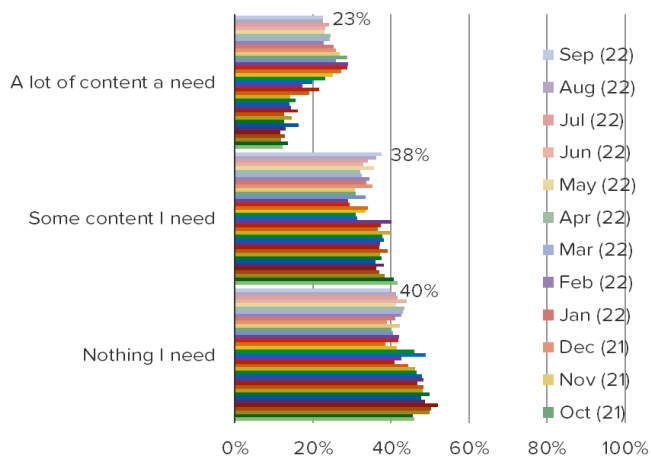
Apple TV+



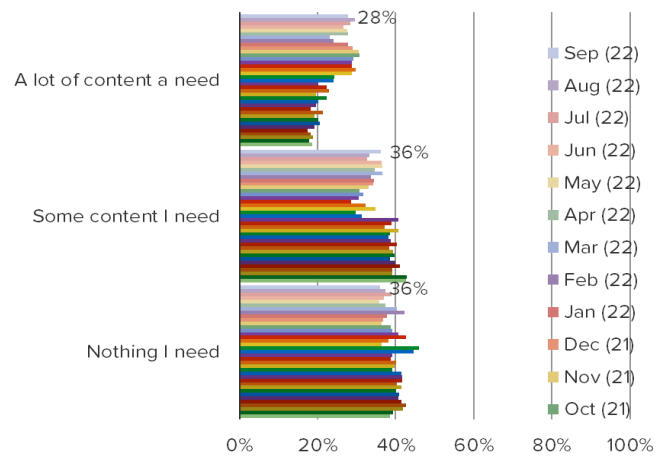
Disney+



HBO Max

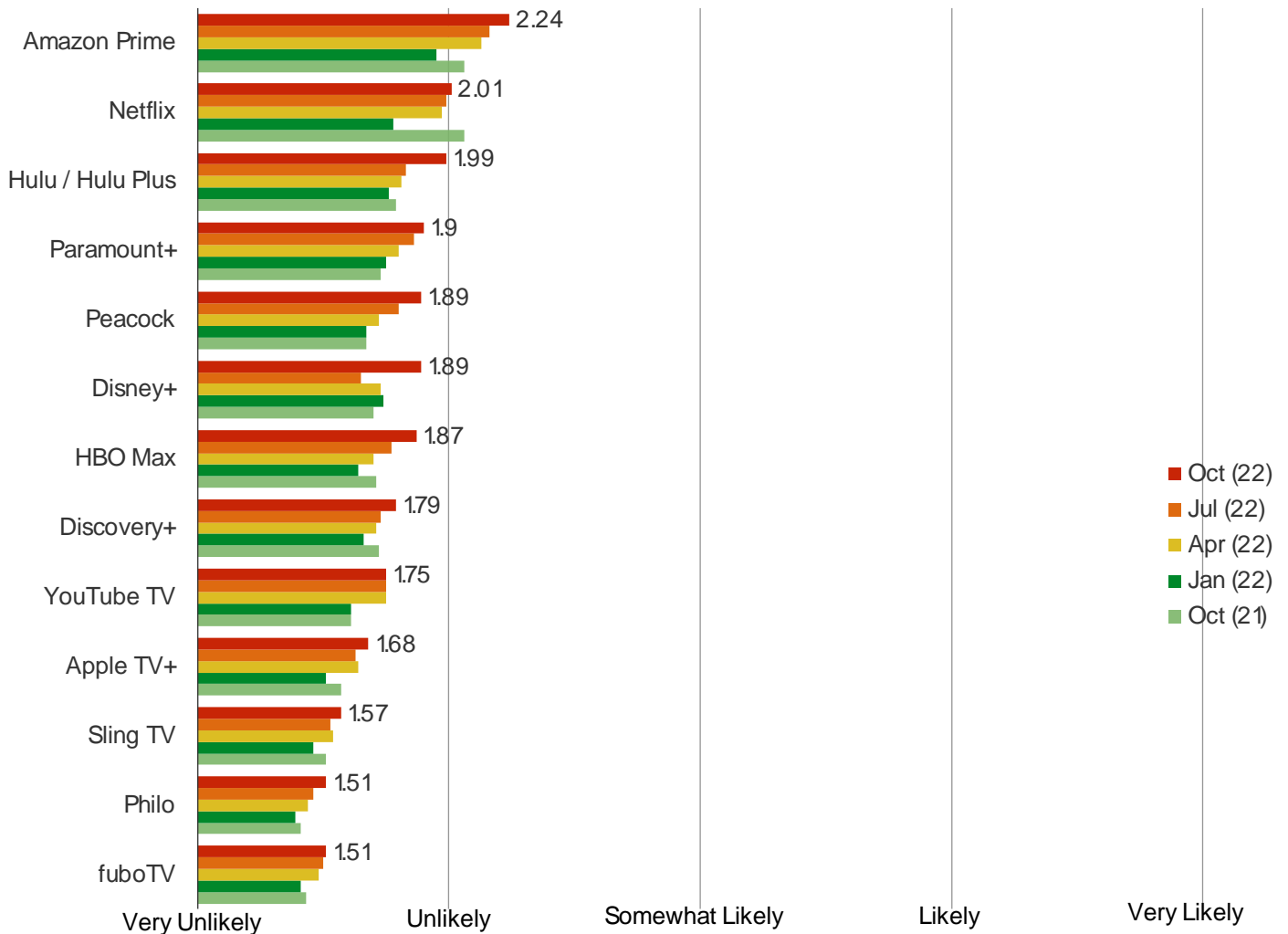


Hulu



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.

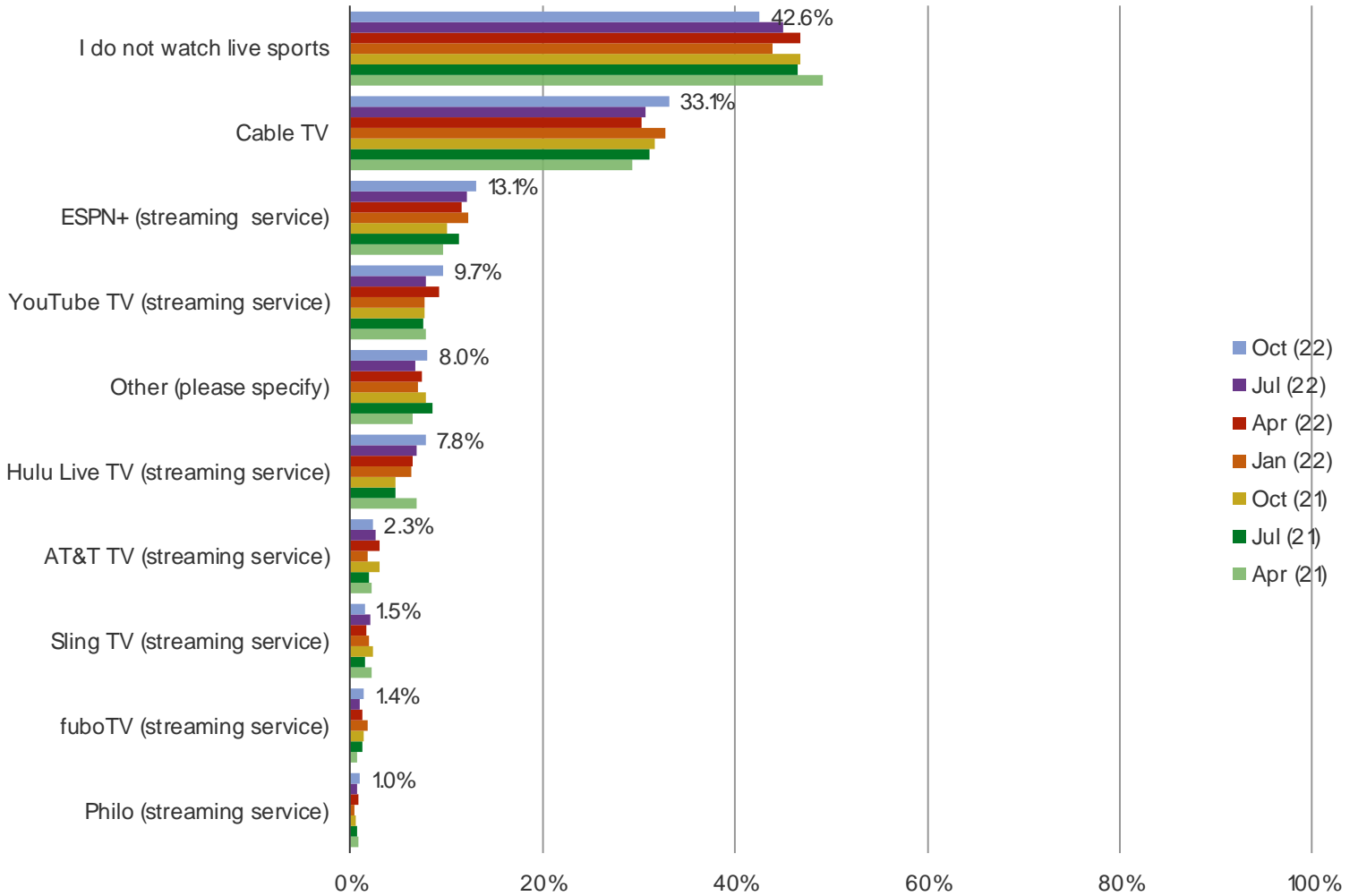


Streaming Wars

CABLE TV AND LIVE SPORTS

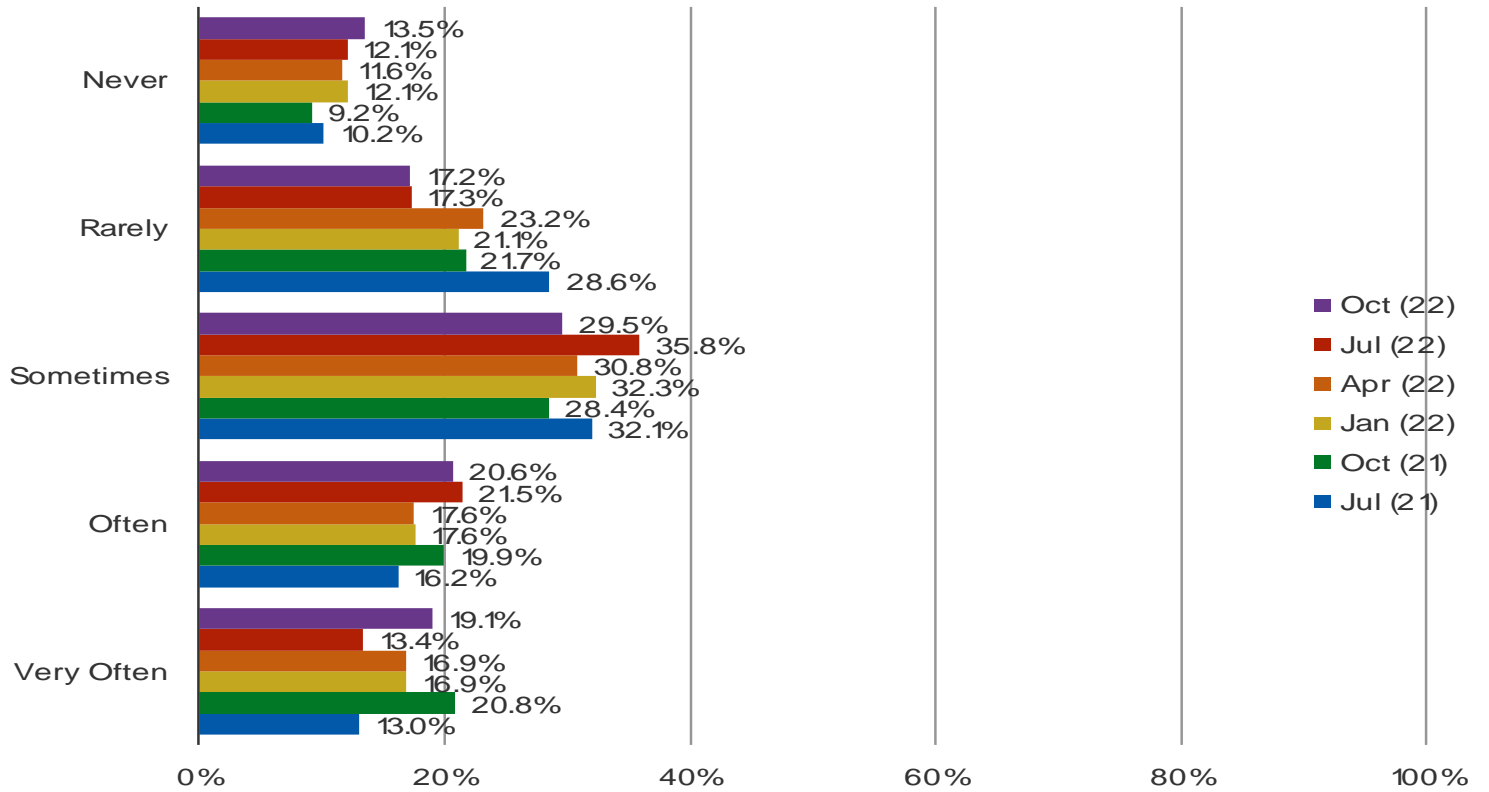
DO YOU USE ANY OF THE FOLLOWING TO WATCH LIVE SPORTS? SELECT ALL THAT APPLY

Posed to all respondents.



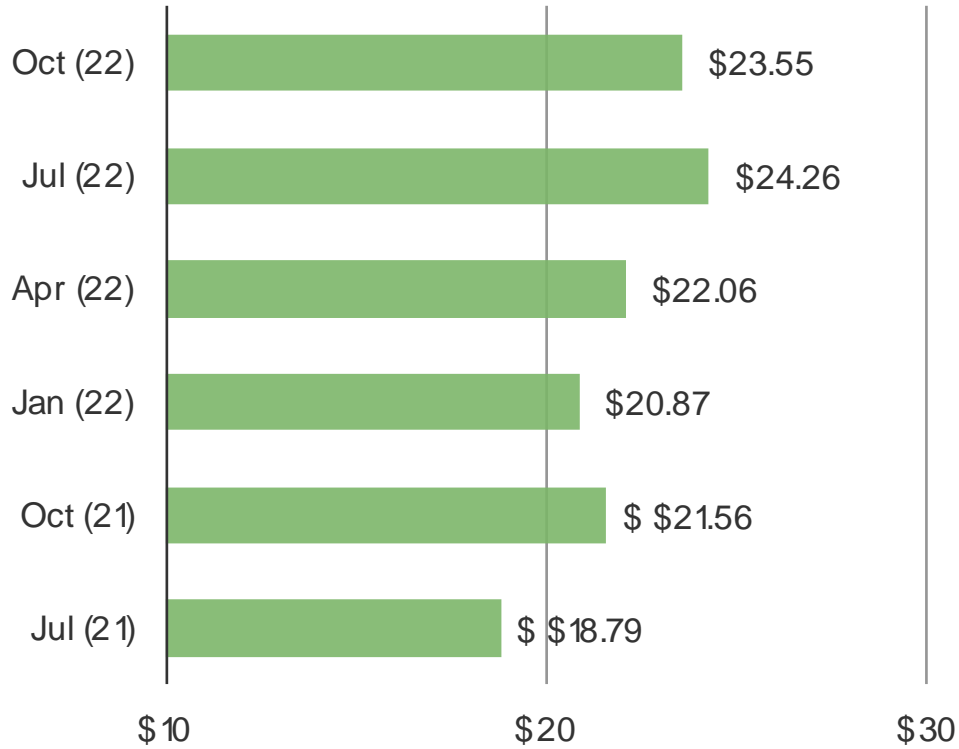
HOW OFTEN DO YOU WATCH ESPN ON CABLE TV?

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



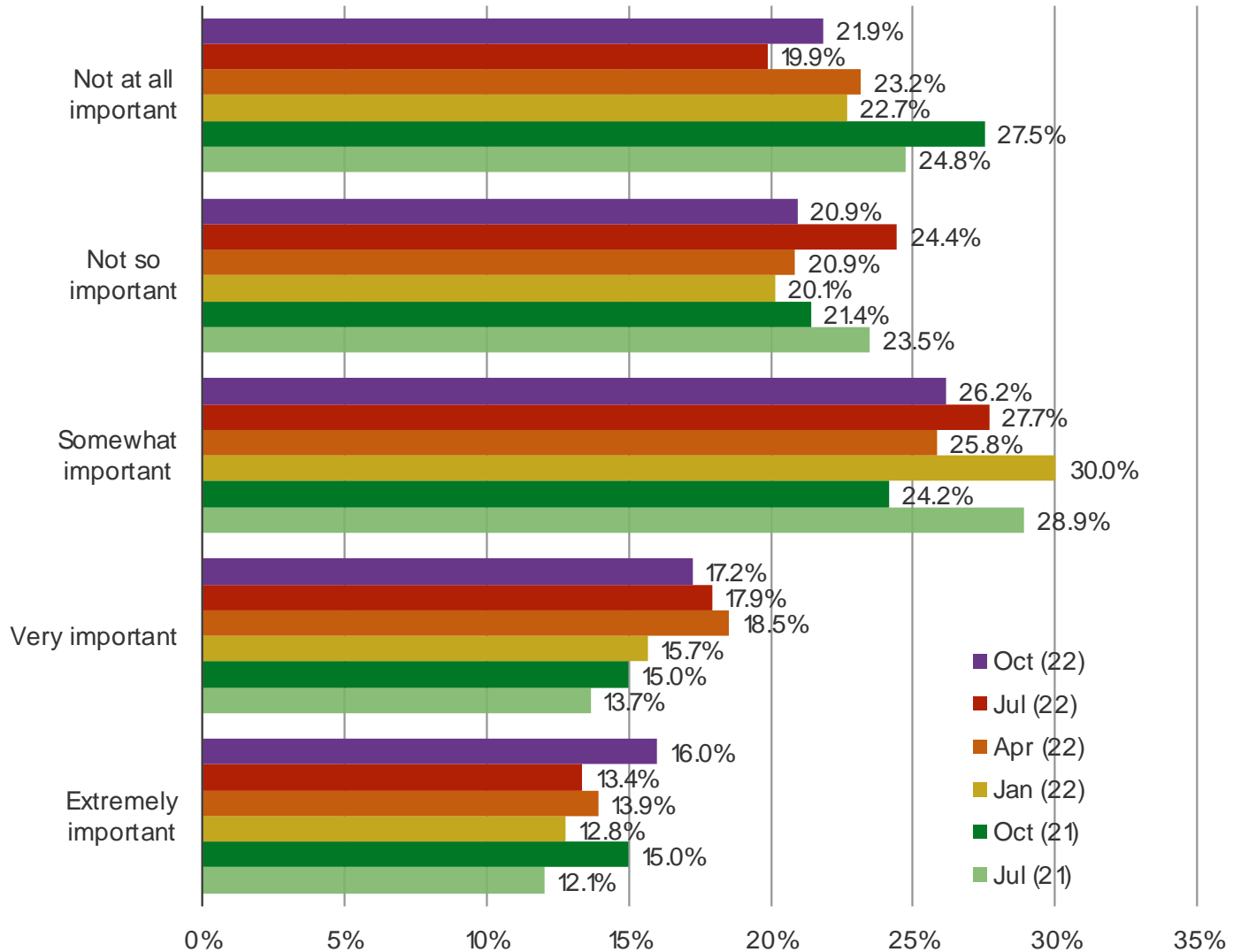
IF YOU DID NOT HAVE CABLE TV, HOW MUCH WOULD YOU BE WILLING TO PAY PER MONTH IN ORDER TO STREAM LIVE SPORTS? (AVERAGE)

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.

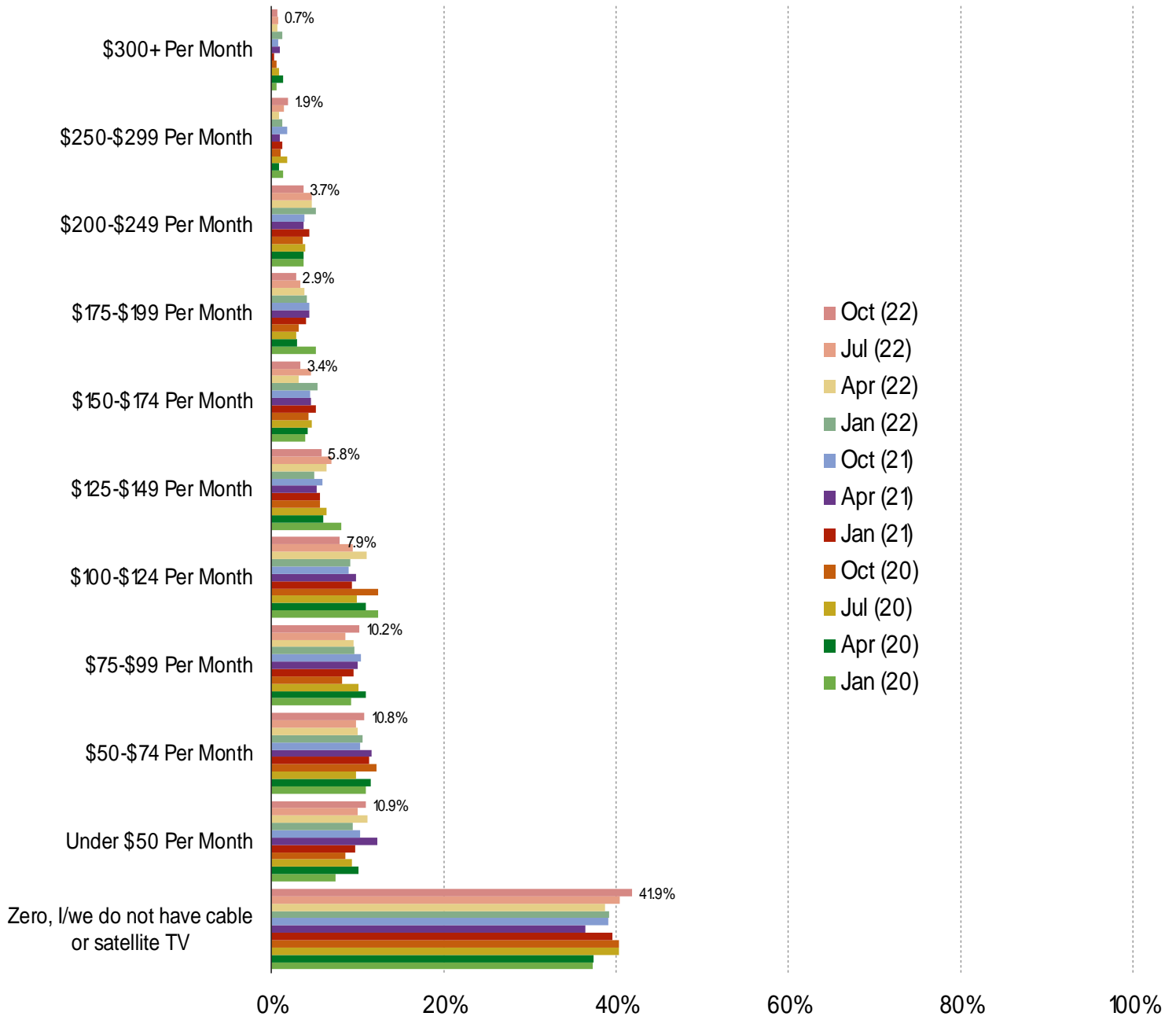


Streaming Wars

SPEND ON CONTENT

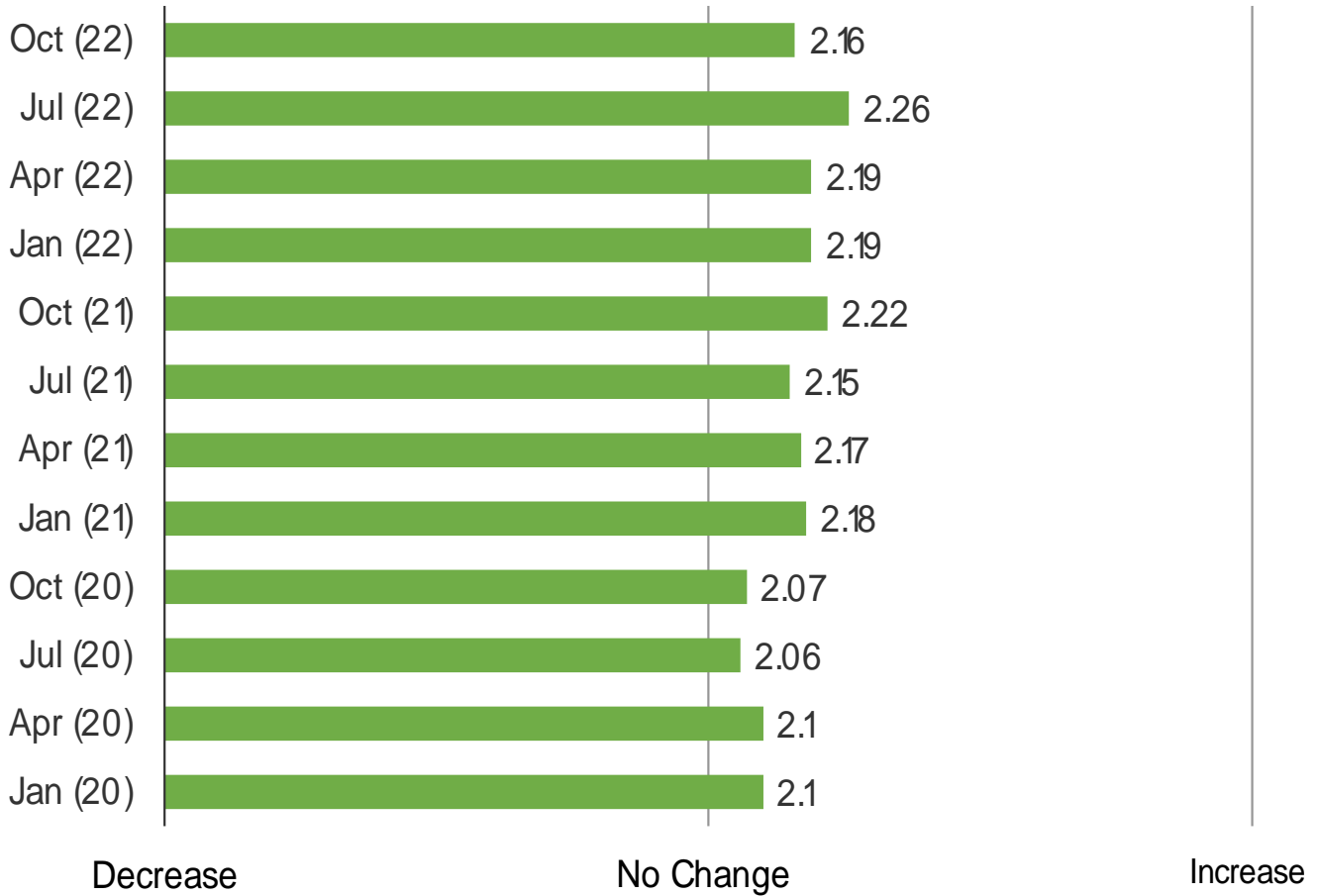
APPROXIMATELY HOW MUCH DO YOU SPEND ON CABLE/SATELLITE TV SERVICES PER MONTH?

Posed to respondents who watch video content at home.



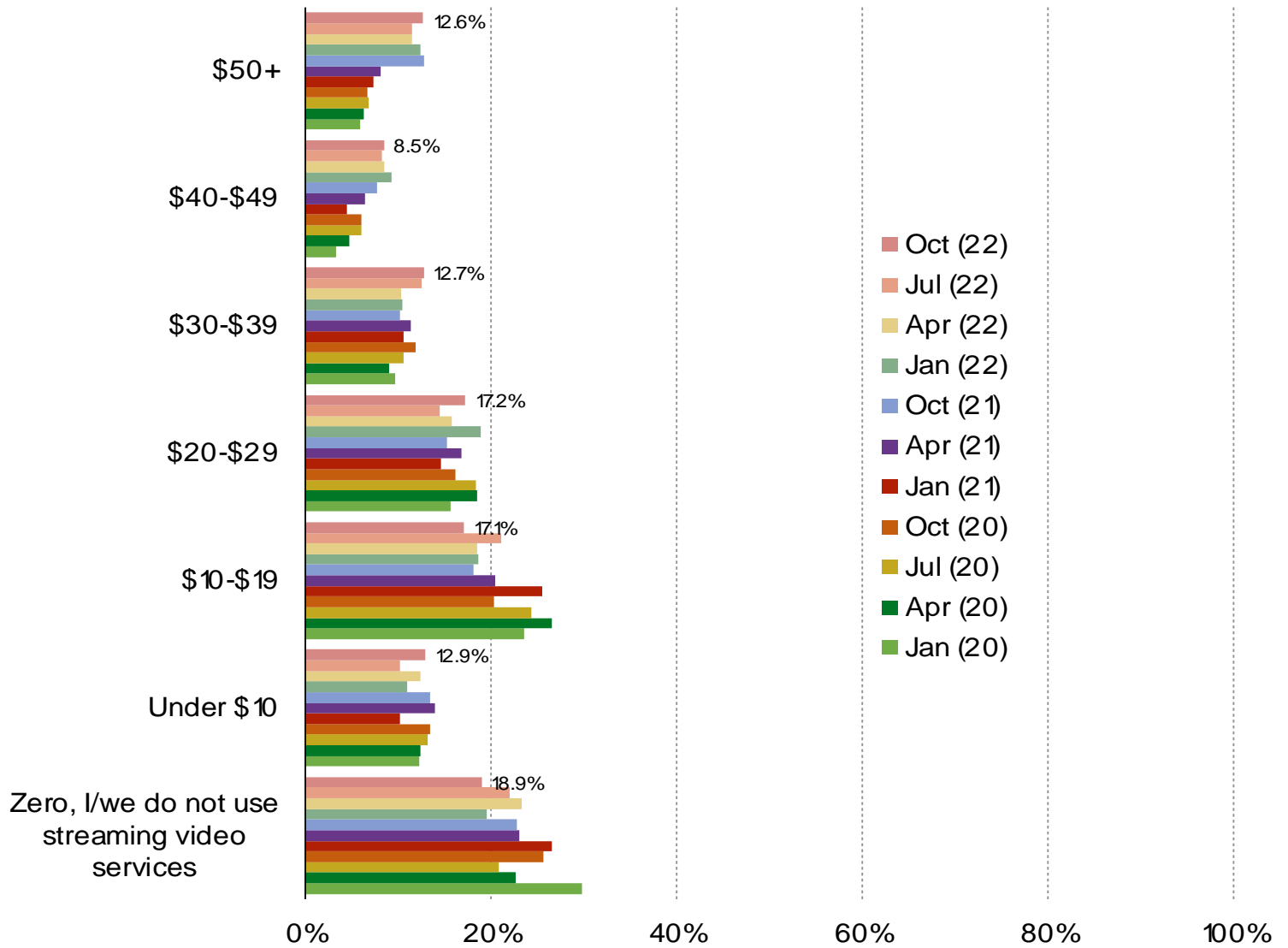
IN THE NEXT YEAR, DO YOU EXPECT THE AMOUNT YOU PAY PER MONTH FOR CABLE OR SATELLITE TV TO CHANGE IN ANY WAY?

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



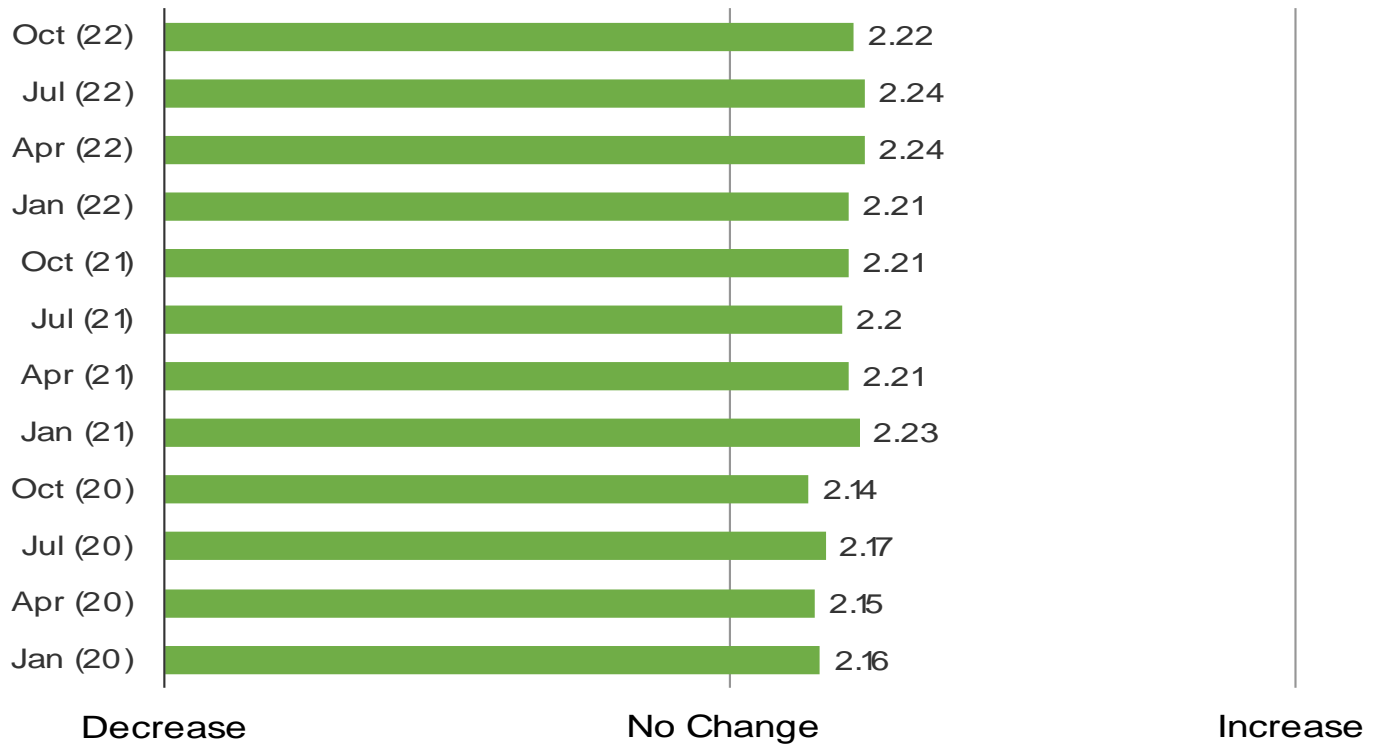
APPROXIMATELY HOW MUCH DO YOU SPEND ON STREAMING VIDEO SERVICES PER MONTH?

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.

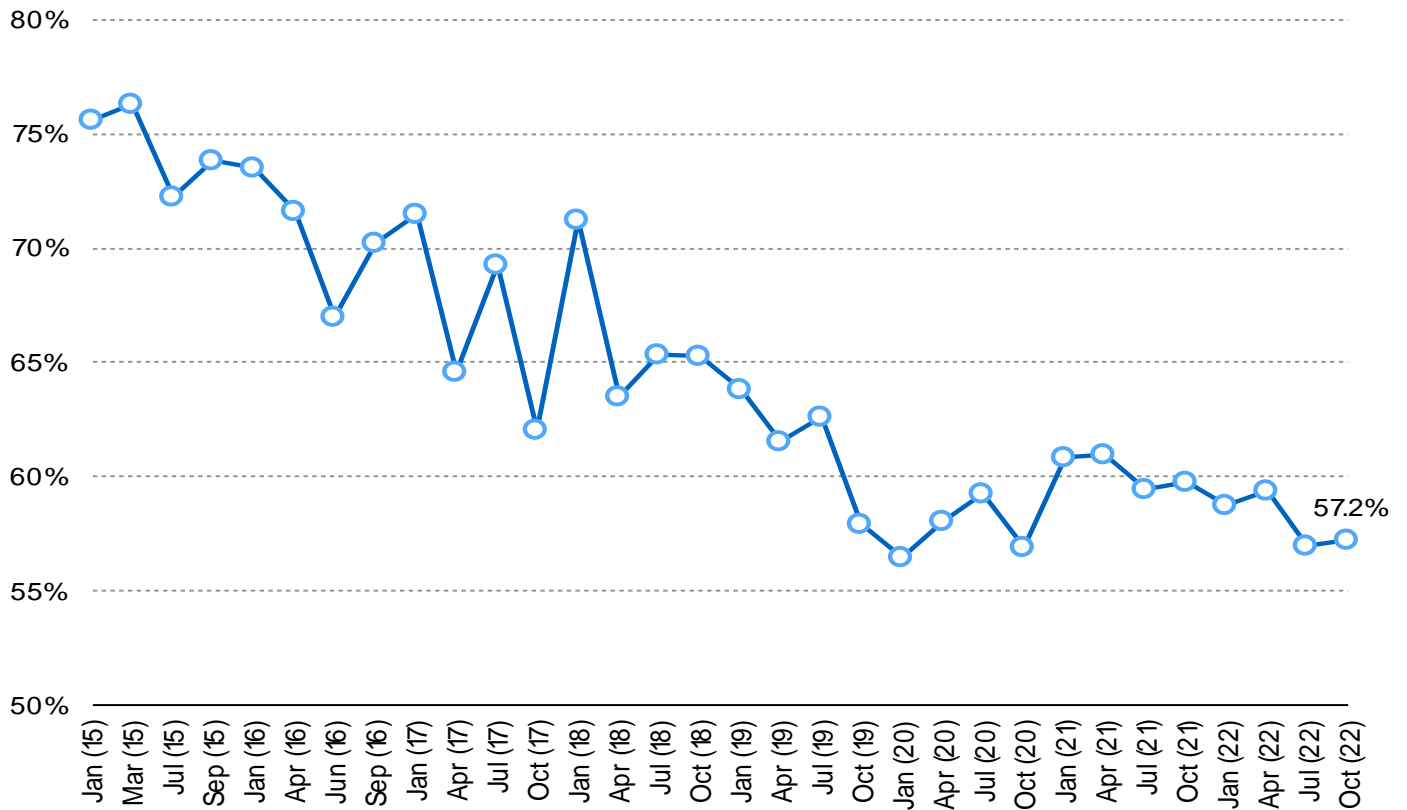


Streaming Wars

CORD CUTTING

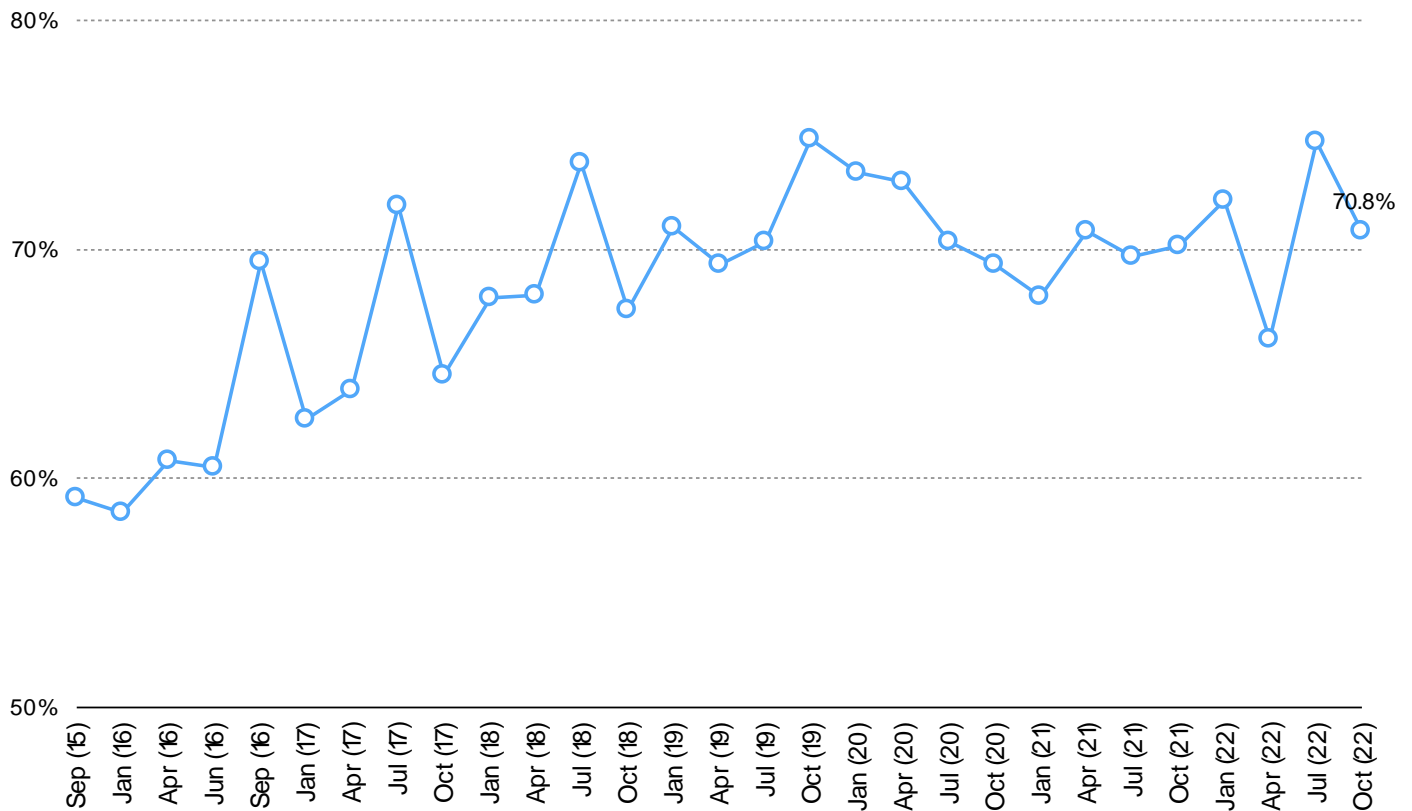
DO YOU CURRENTLY SUBSCRIBE TO CABLE, SATELLITE, OR TELCO TV?

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.

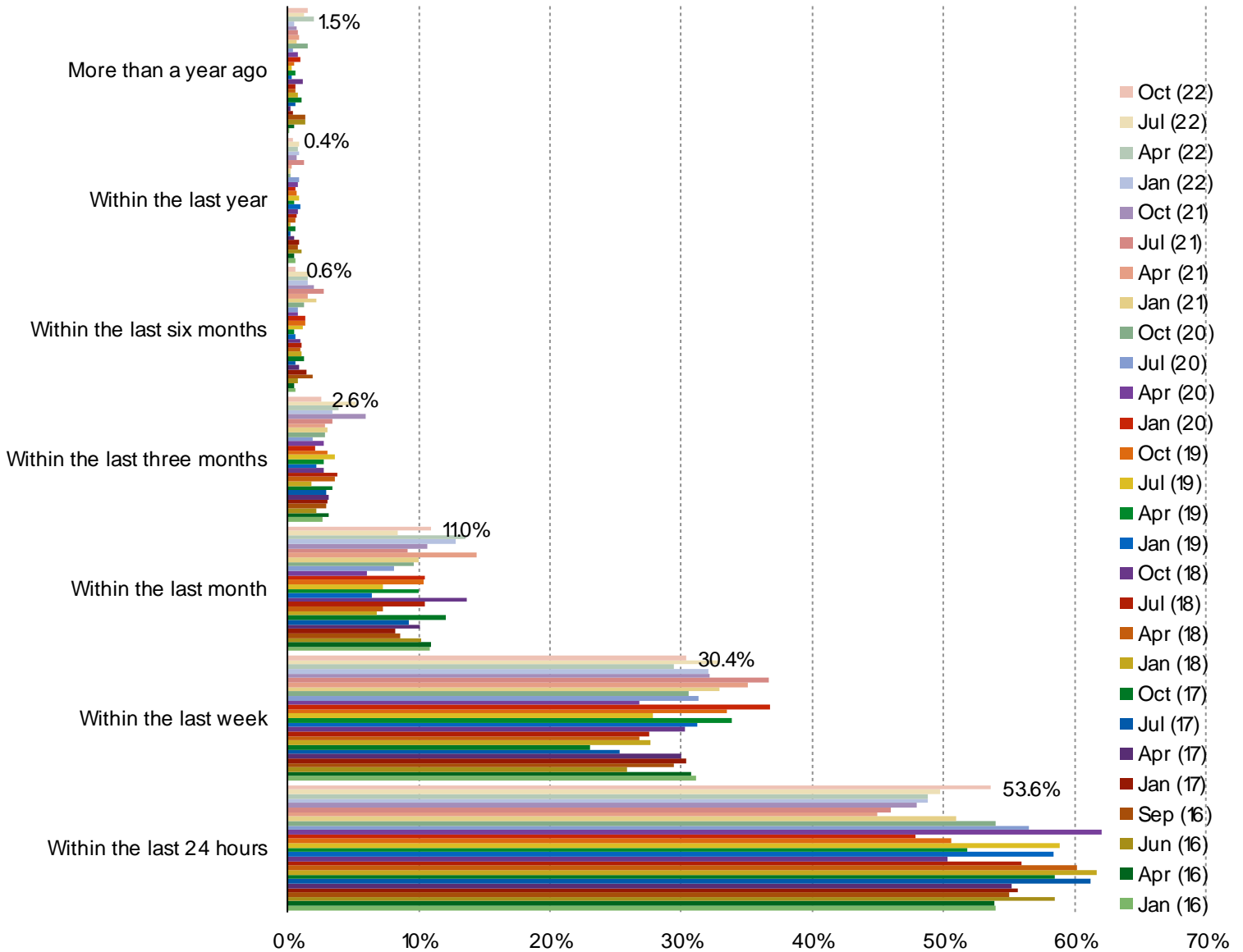


Streaming Wars

NETFLIX SUBSCRIBER ENGAGEMENT

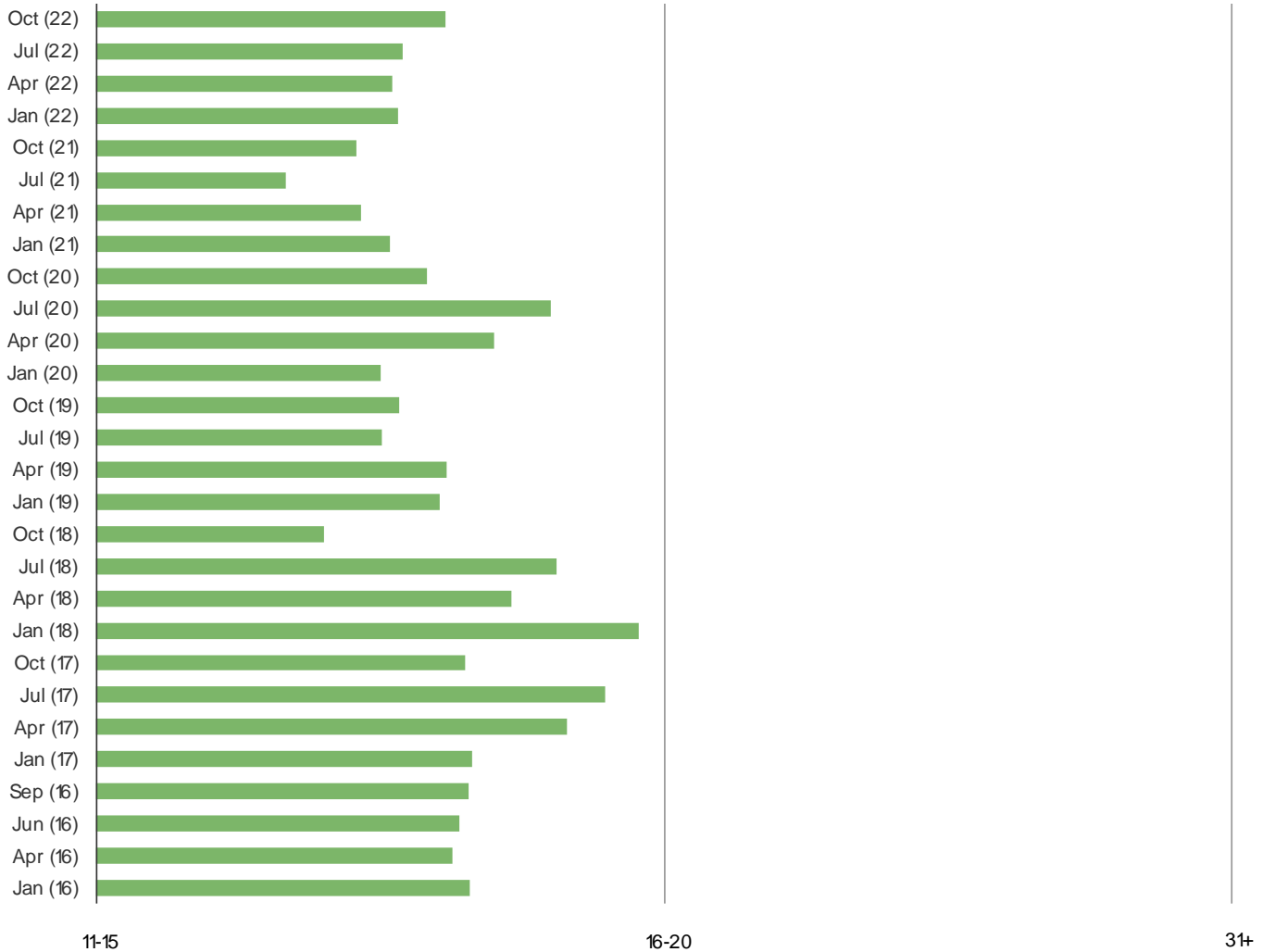
WHEN IS THE LAST TIME YOU WATCHED SOMETHING ON NETFLIX?

Posed to Netflix subscribers.



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

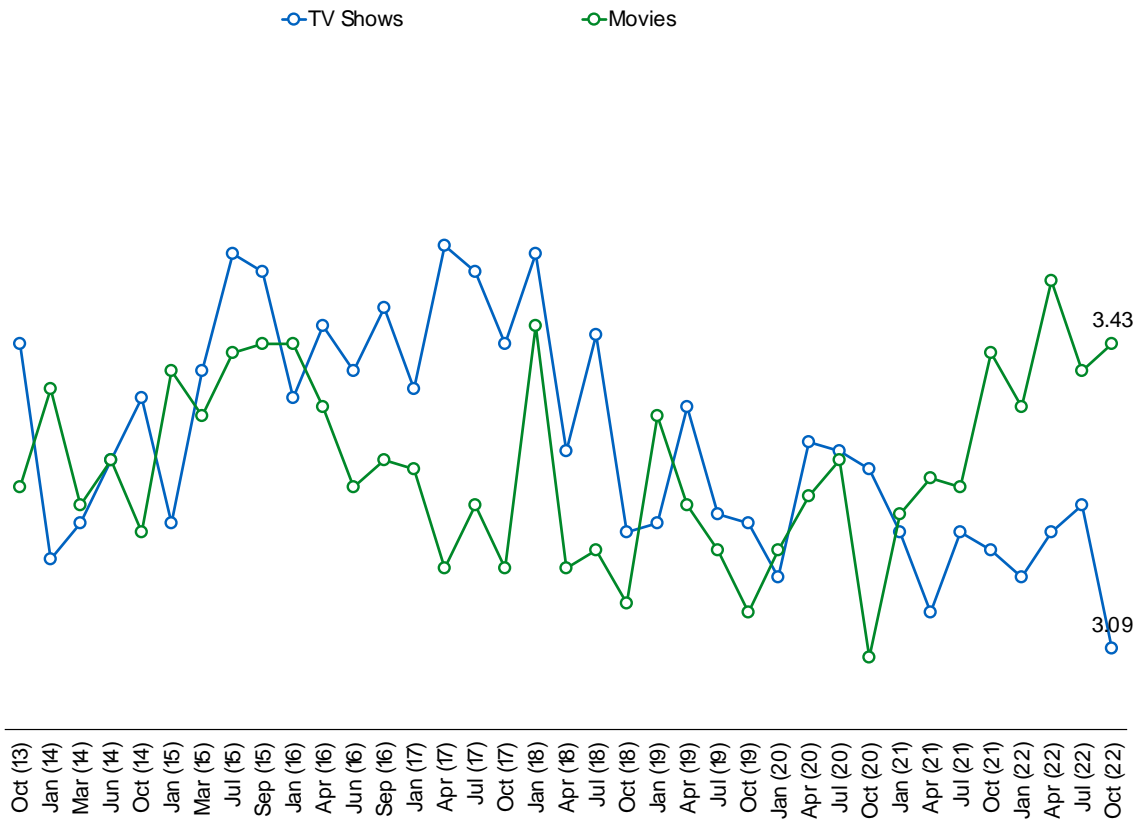
Posed to Netflix subscribers.



FREQUENCY OF WATCHING TV SHOWS AND MOVIES

Posed to Netflix subscribers.

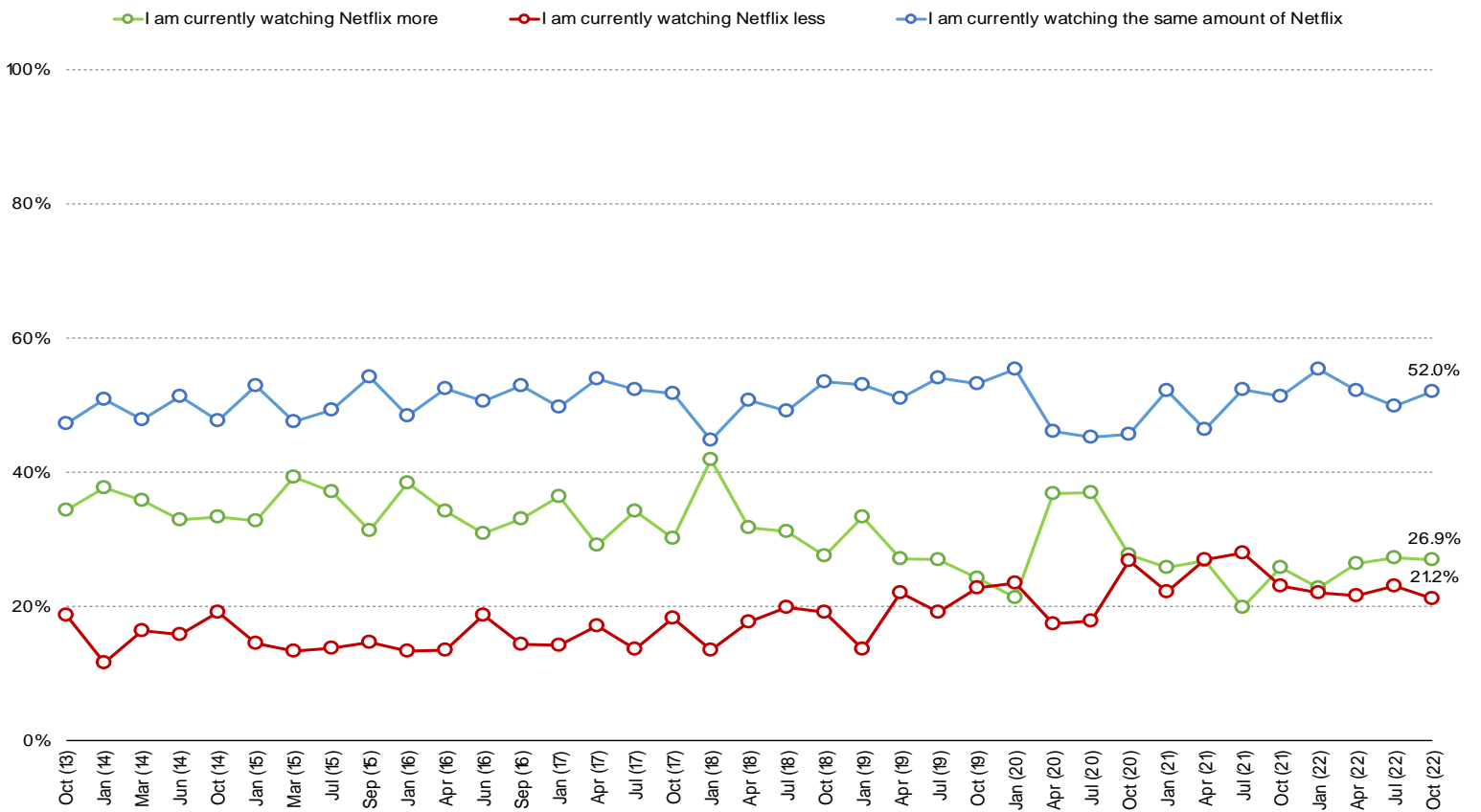
Frequently



Somewhat Frequently

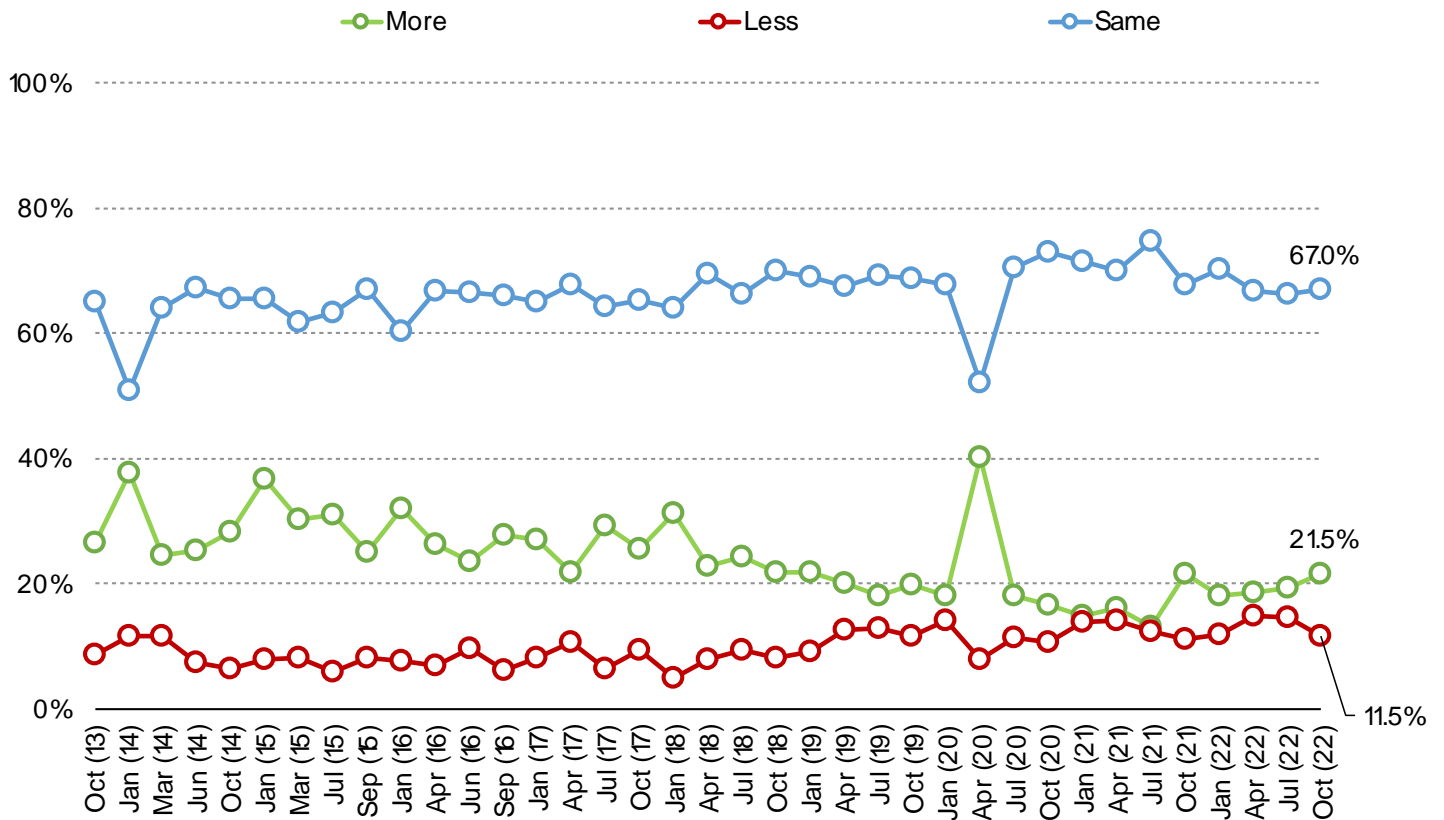
PLEASE COMPARE YOUR CURRENT USAGE OF NETFLIX WITH YOUR USAGE 3-6 MONTHS AGO.

Posed to Netflix subscribers.



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

Posed to Netflix subscribers.

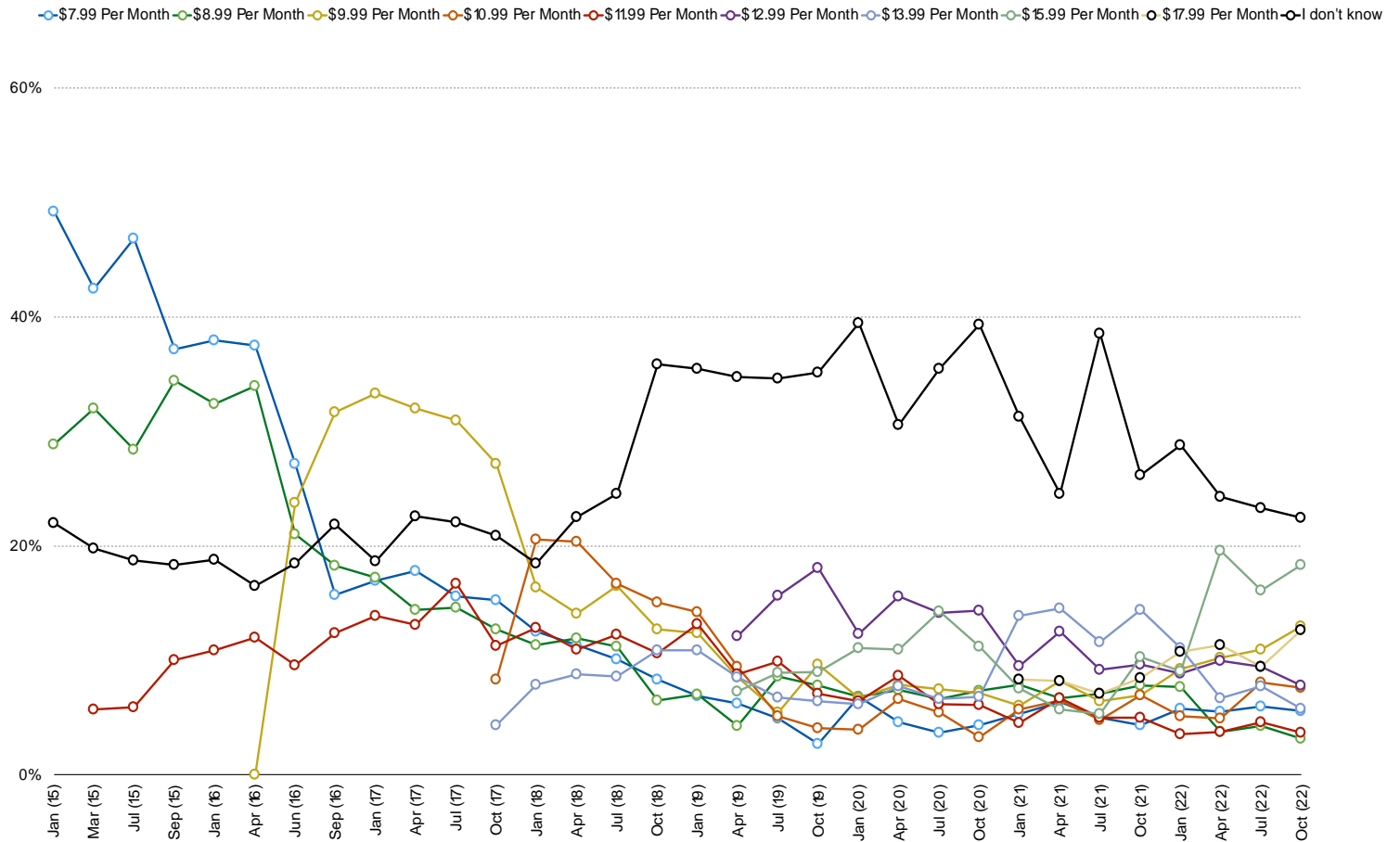


Streaming Wars

NETFLIX PRICING POWER

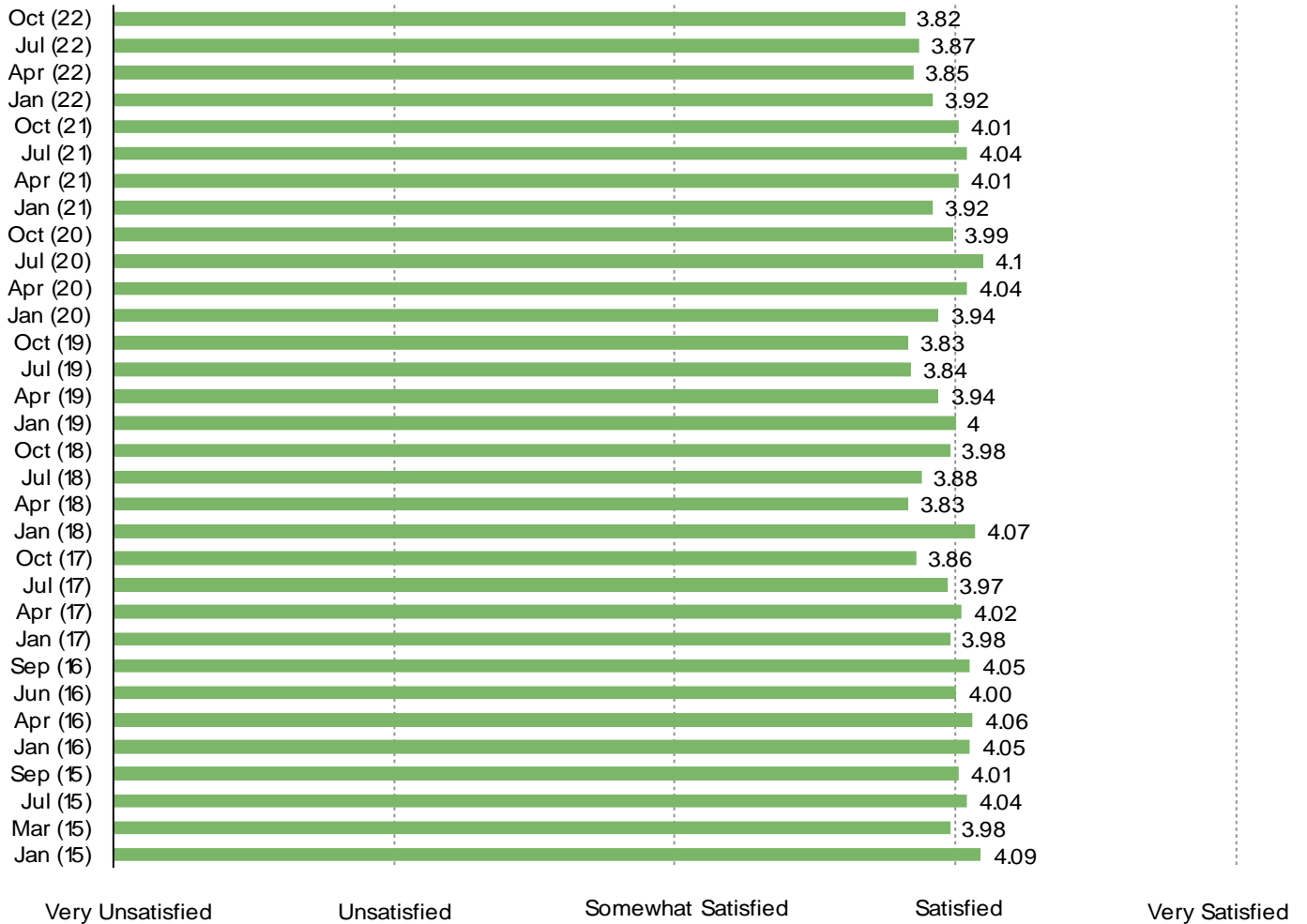
HOW MUCH DO YOU PAY FOR YOUR NETFLIX STREAMING SUBSCRIPTION?

Posed to respondents who said they are Netflix subscribers.



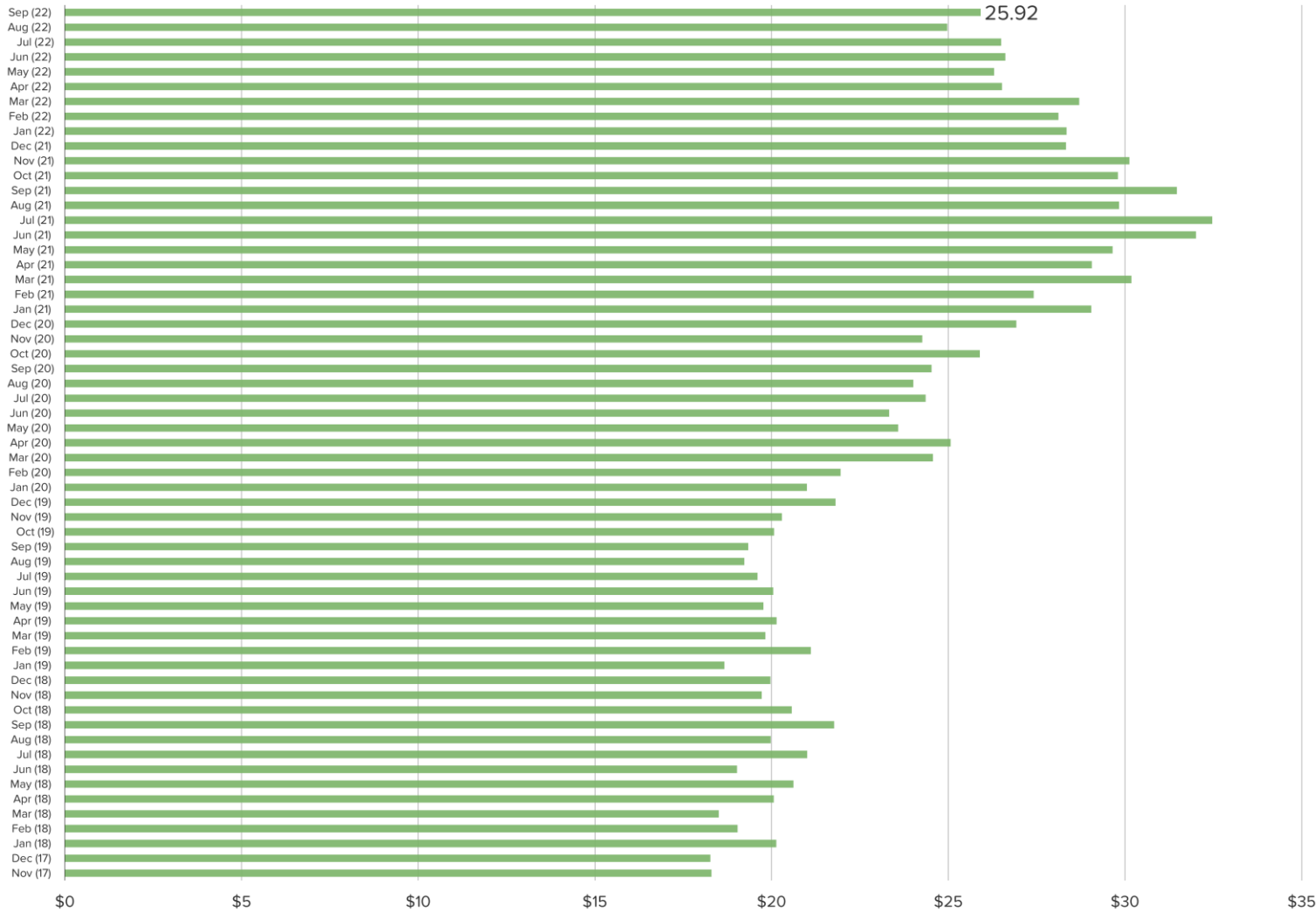
SATISFACTION WITH THE VALUE THEY RECEIVE FOR THE MONEY WITH NETFLIX

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.

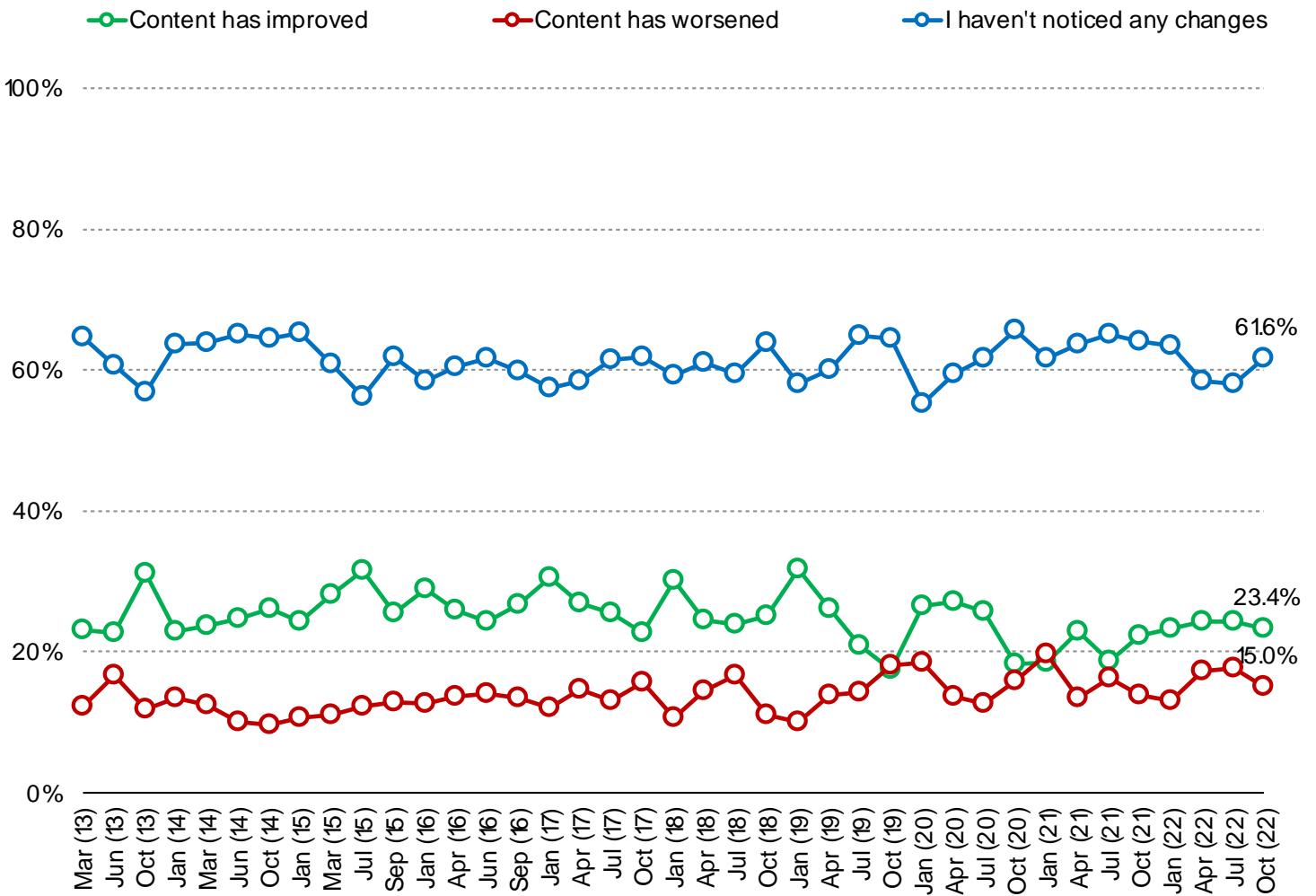


Streaming Wars

NETFLIX CONTENT

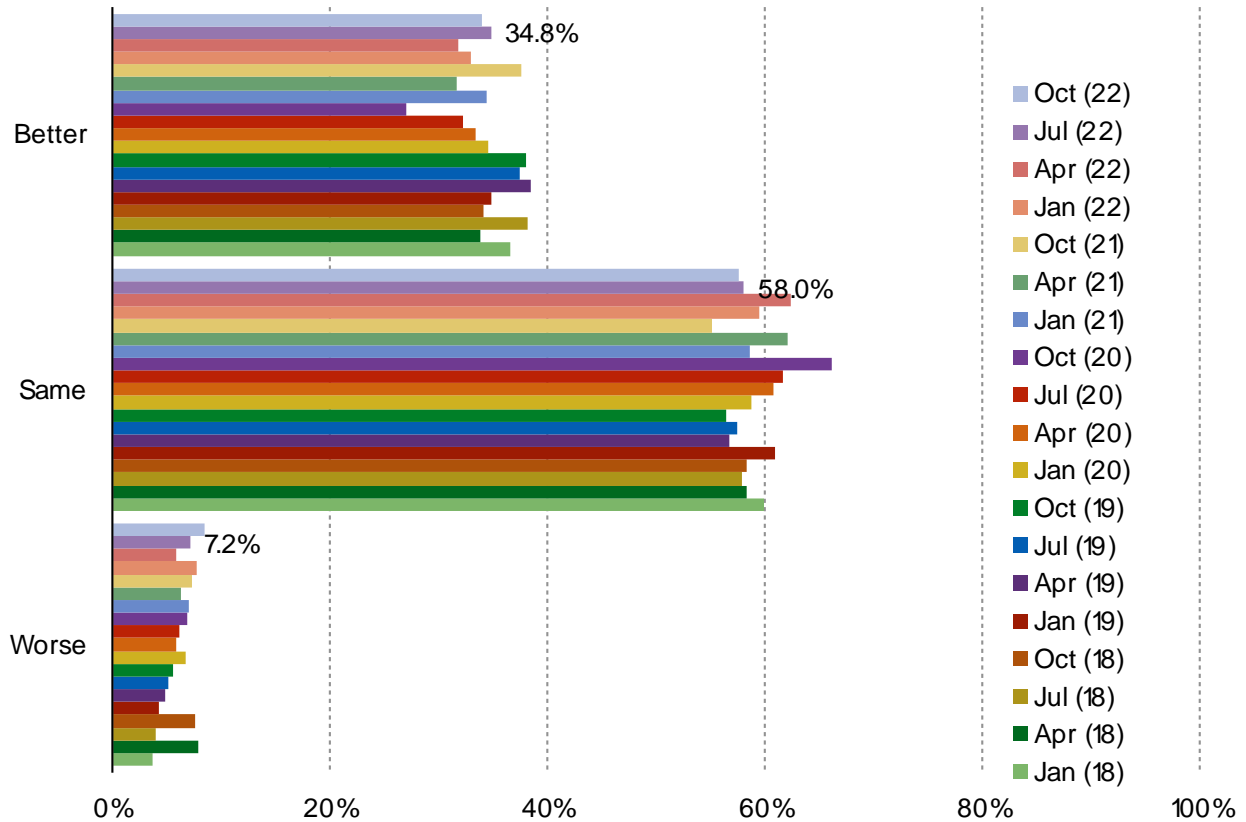
HAVE YOU NOTICED ANY CHANGES TO NETFLIX'S CONTENT OVER THE LAST SIX MONTHS?

Posed to Netflix subscribers.



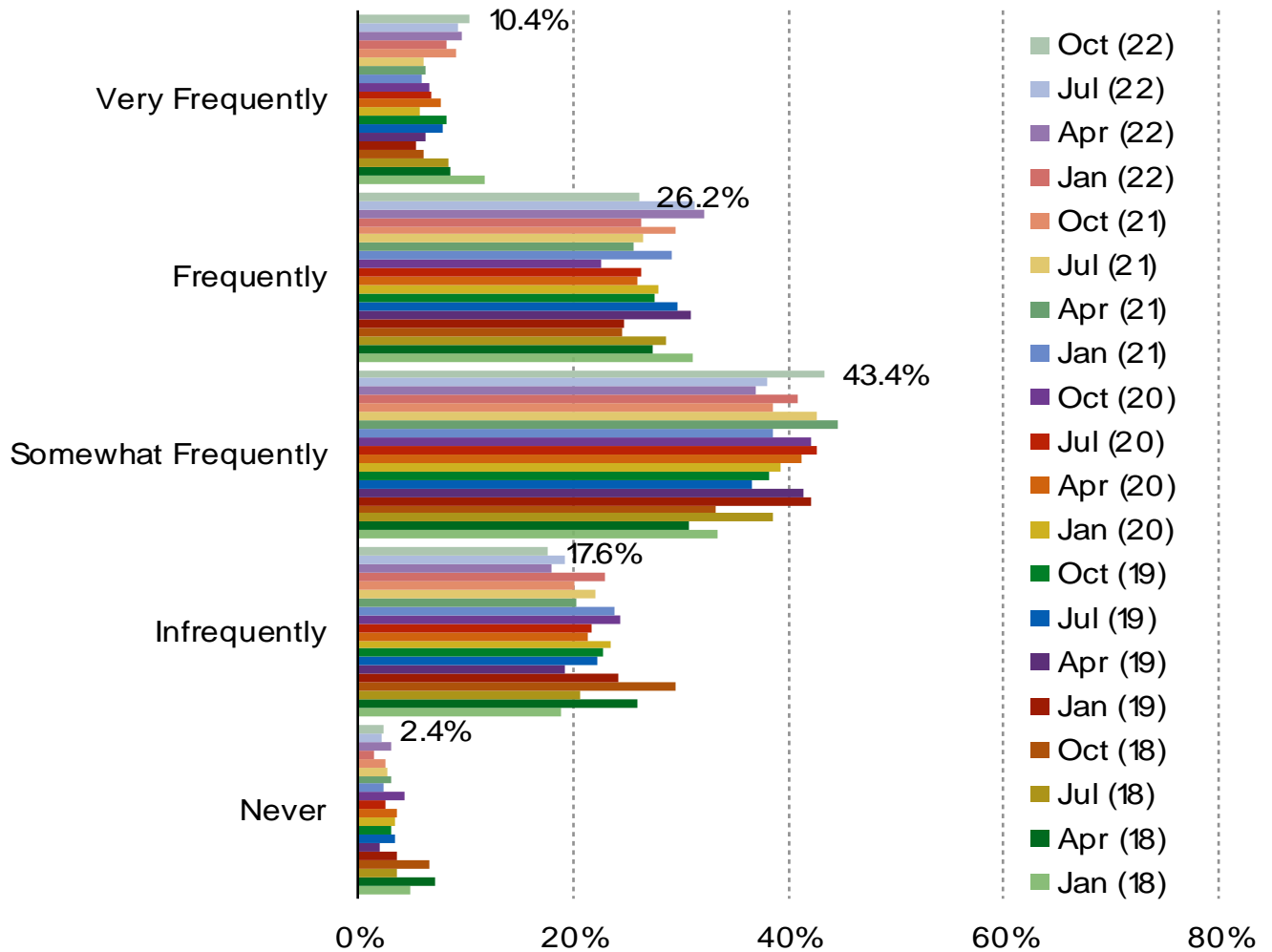
HOW DO YOU COMPARE NETFLIX ORIGINAL CONTENT SHOWS AGAINST SHOWS YOU VIEW ON OTHER NETWORKS OR SERVICES?

Posed to Netflix subscribers.



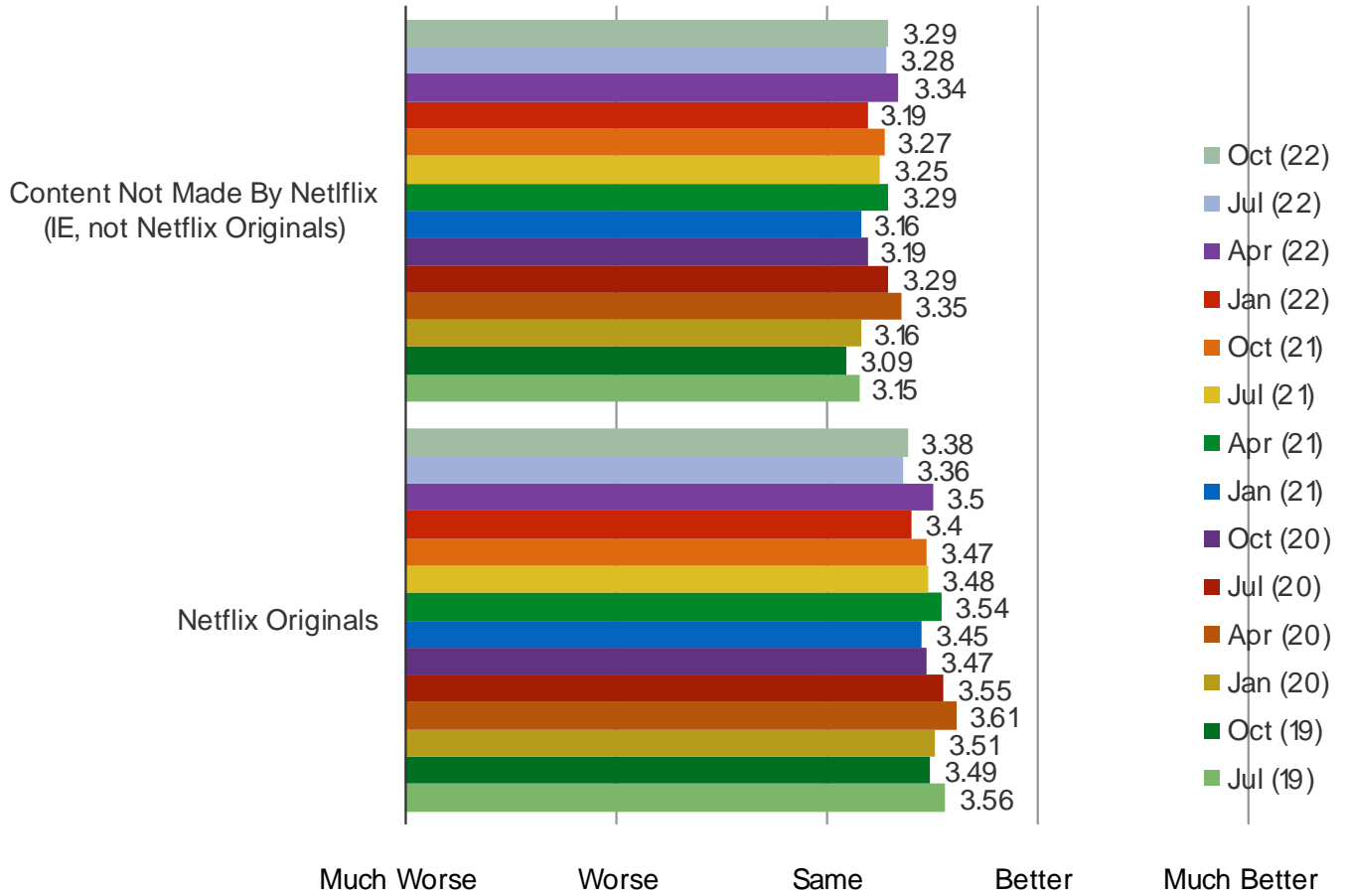
HOW OFTEN DO YOU WATCH NETFLIX ORIGINAL CONTENT SHOWS?

Posed to Netflix subscribers.



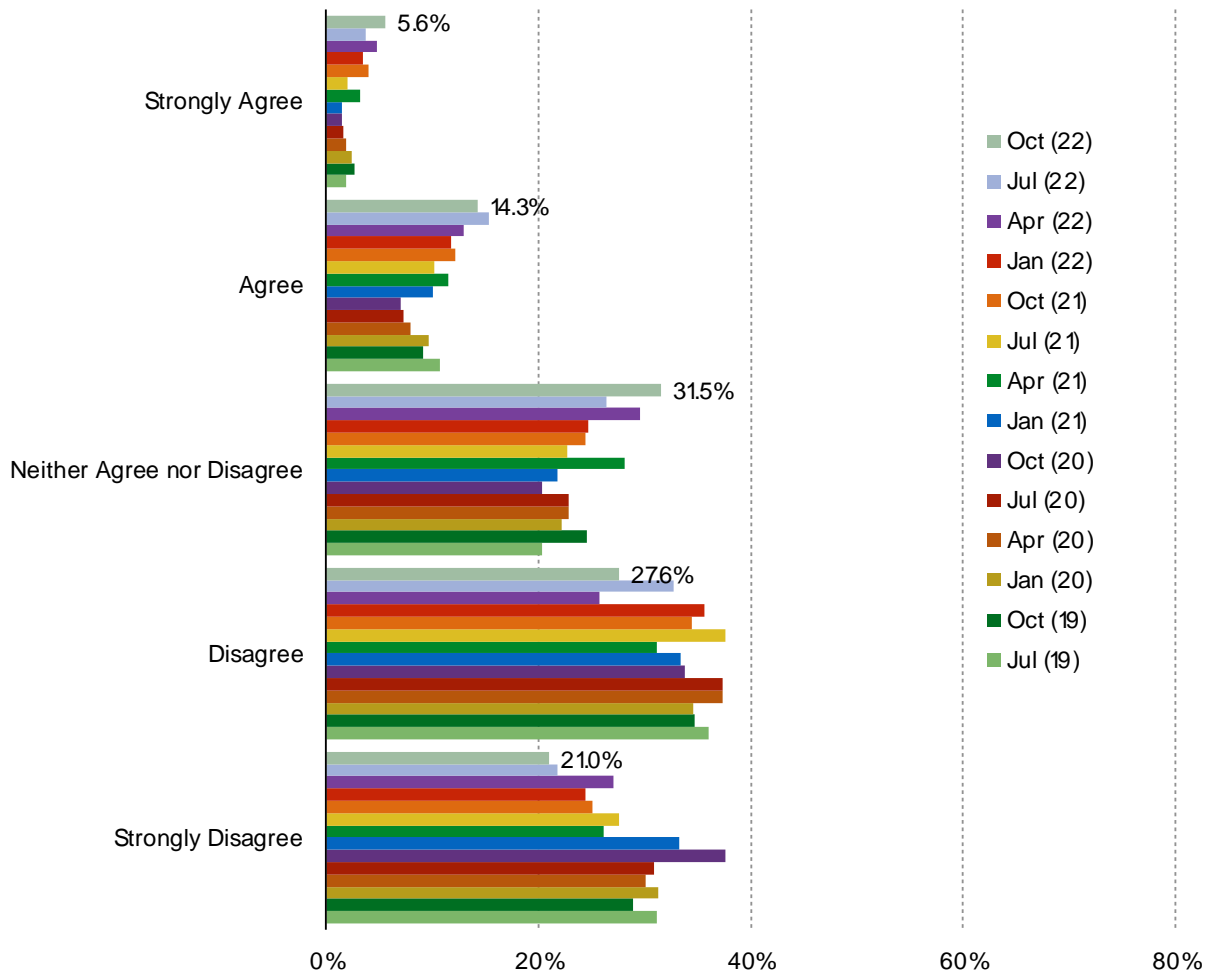
ONE YEAR FROM NOW, DO YOU EXPECT THE CONTENT AVAILABLE ON NETFLIX TO BE BETTER OR WORSE THAN IT IS TODAY?

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.

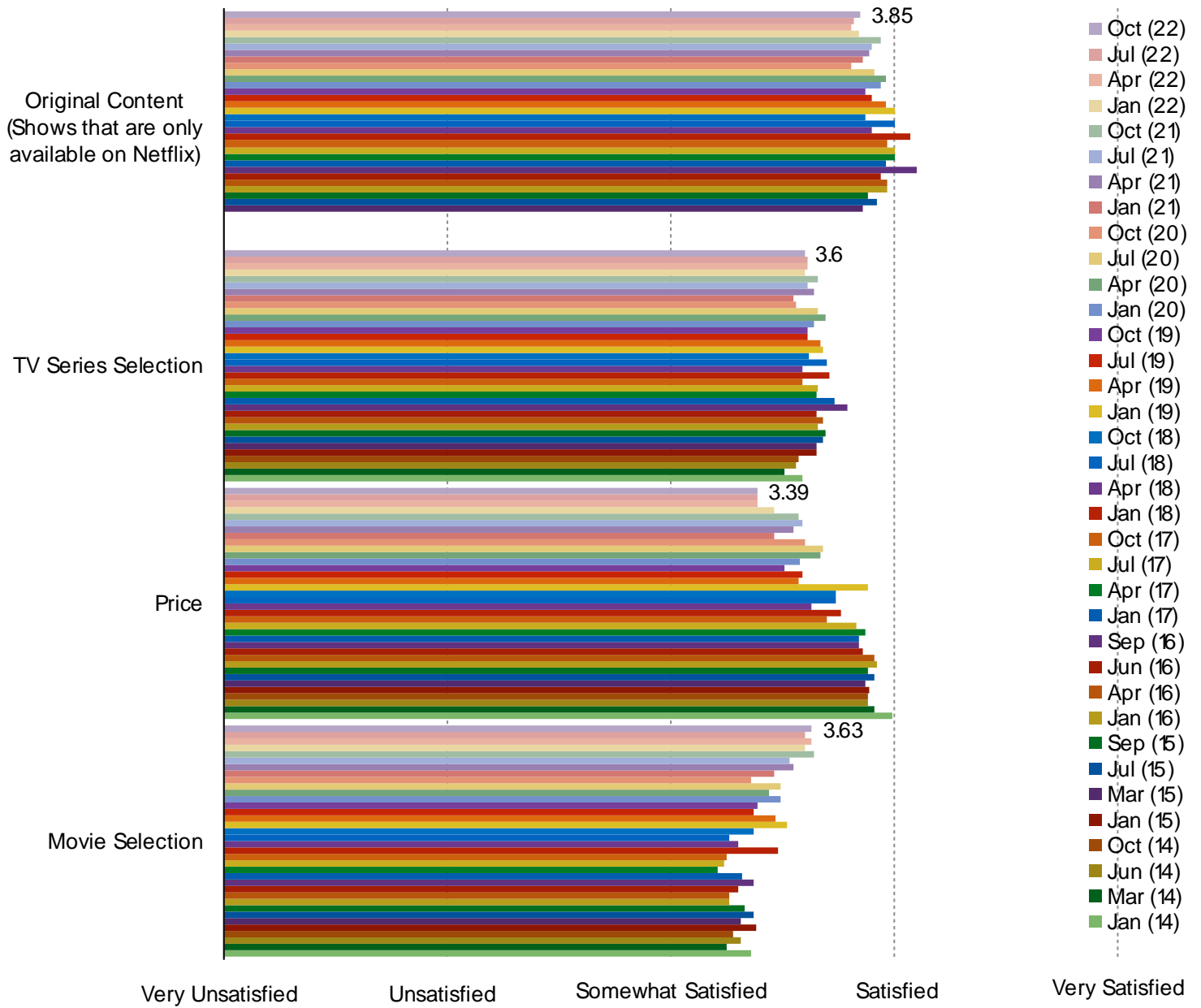


Streaming Wars

NFLX SENTIMENT

SATISFACTION WITH NETFLIX

Posed to Netflix subscribers.

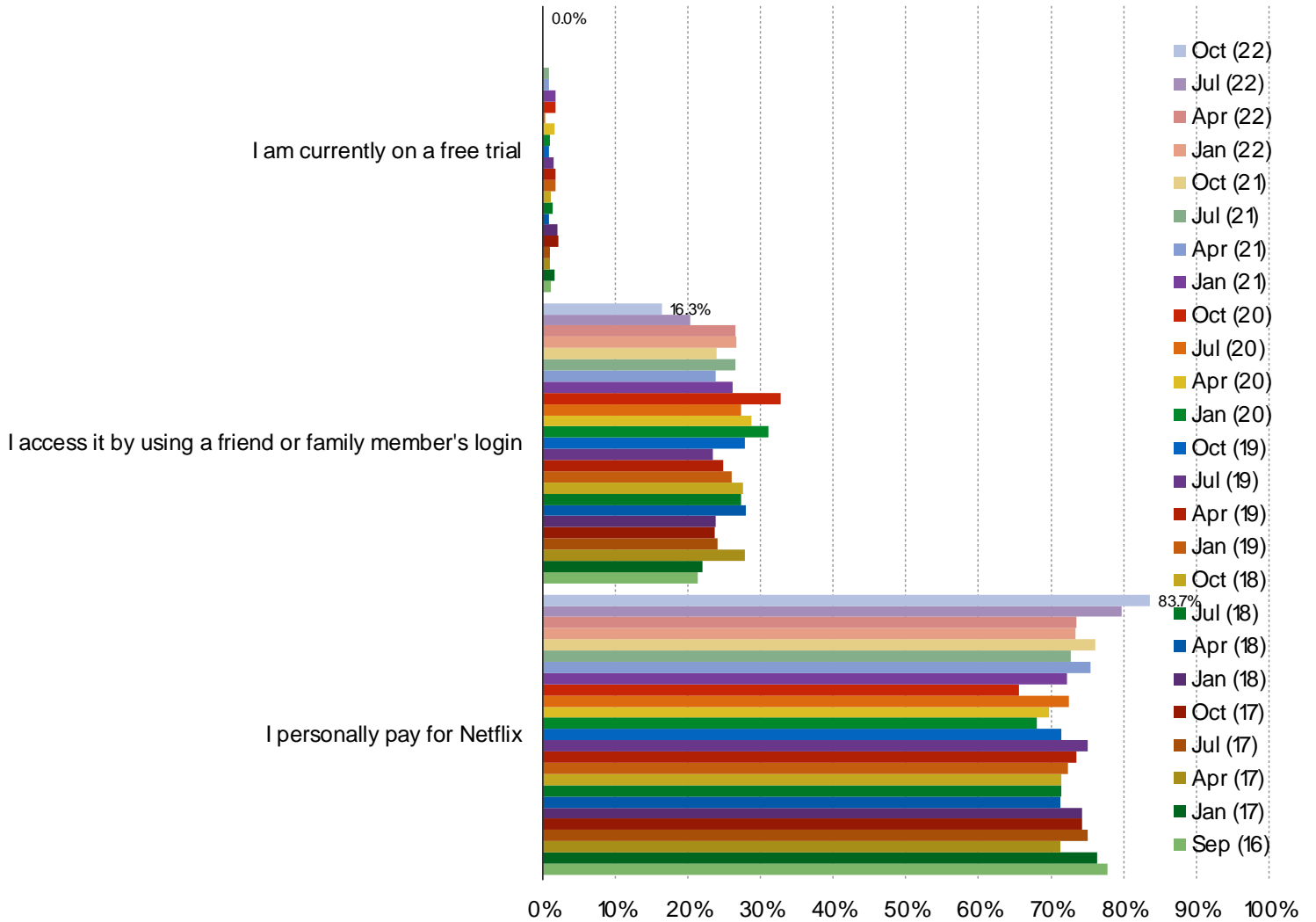


Streaming Wars

NFLX ACCOUNT SHARING

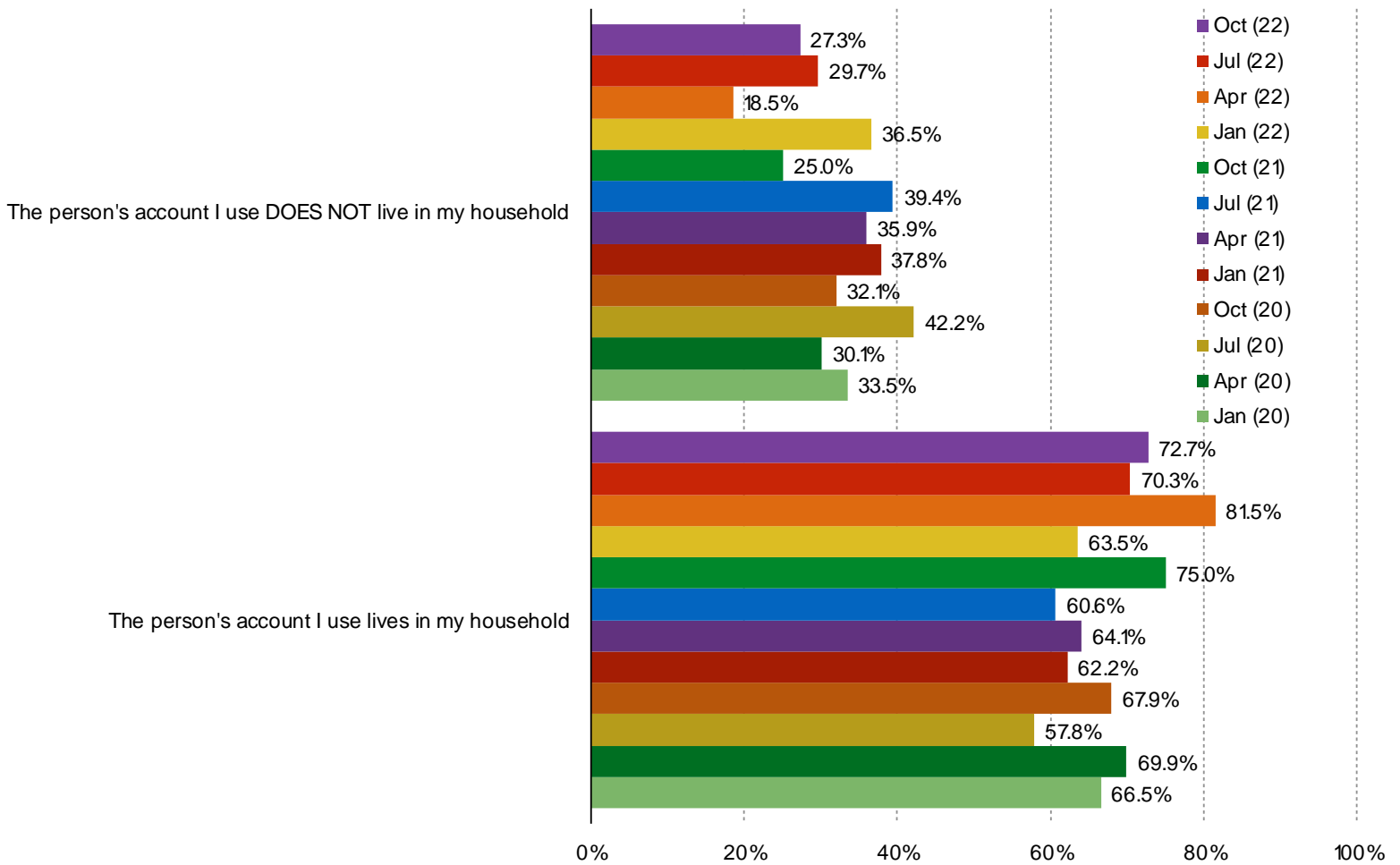
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

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).

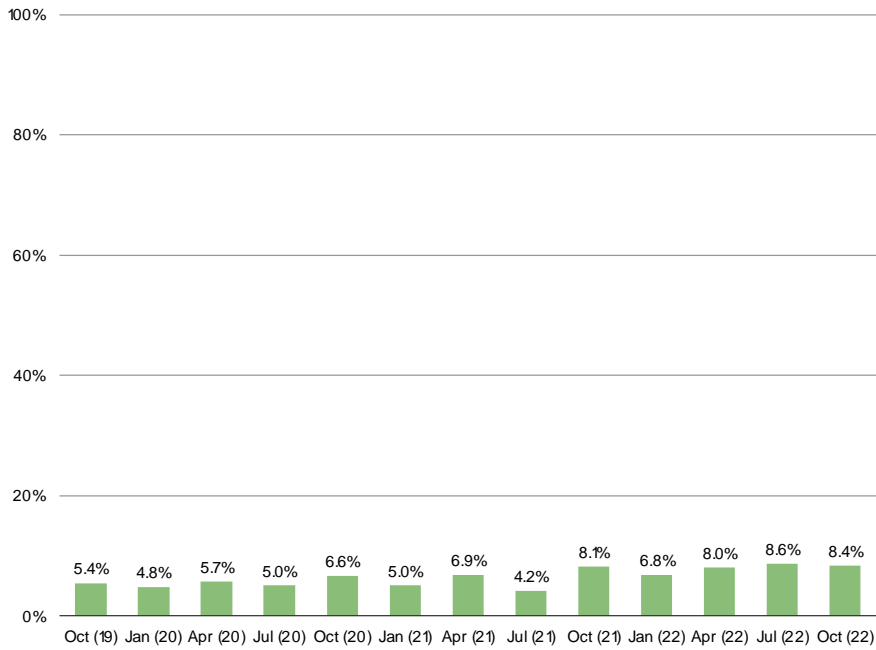


Streaming Wars

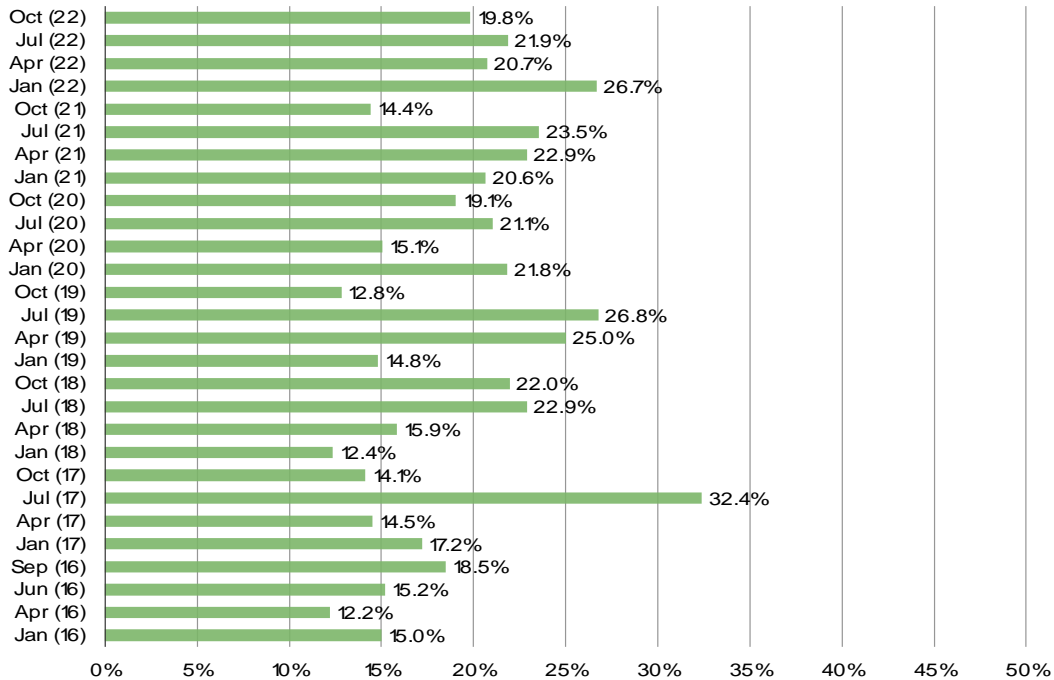
CYCLING IN AND OUT OF NETFLIX

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.

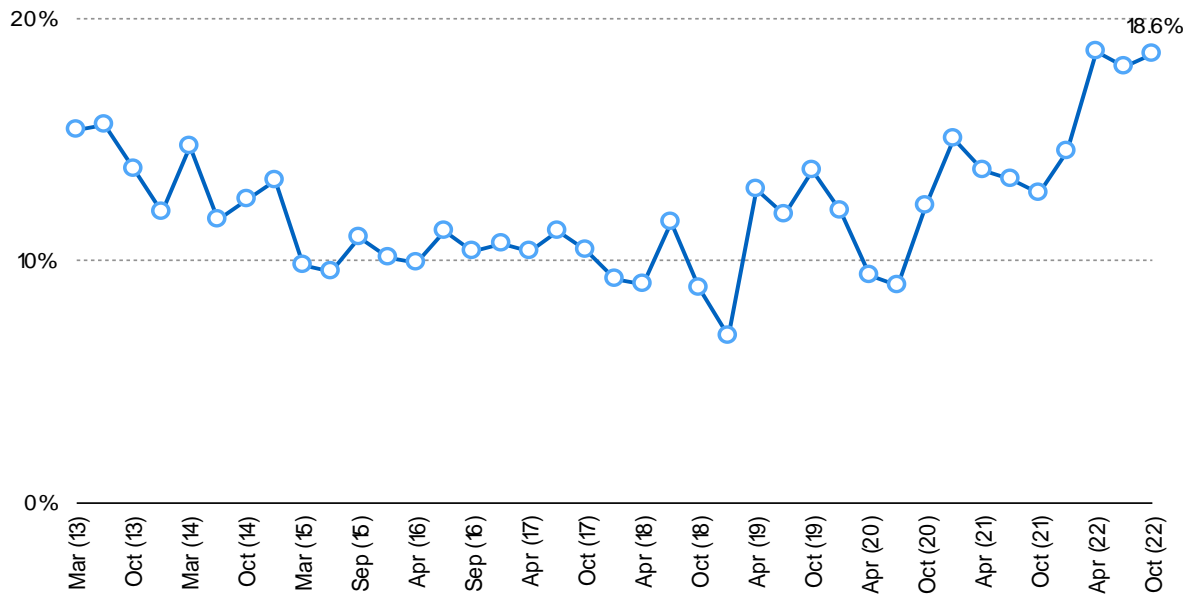


Streaming Wars

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.

Not enough shows I watch

Content hasn't changed much, not many new things happening too often

Try something new

Don't like their original content

Because no more fun movies there

Price

Cost

It's expensive for the infrequent amount of time I watch

Because the prices keep going up

I just don't watch the content anymore and think other platforms are better

Getting harder to find anything I want to watch

Poor content

There is a ton of foreign content and very little English language stuff

There are some more inexpensive streaming network

I found there are other flat form that is inexpensive than Netflix

their film catalog is bad. most of their new programming is not good

Need to save money

Not enough new TV show and movie

Inflation

They don't have they movies/series I want

Far too expensive

Inflation

Not worth it

Not enough new movies I like

Not enough changing of movie titles or content

It more good movies or shows on it

Lack of movies. Lack of content

The original shows are dragging on and no new shows are good enough to keep sticking to Netflix

The current content is not worth the price we're paying.

No good content anymore so many good things have been taken away

Cost vs content

Because I have prime video that came with my account

Too expensive

It's not worth what I'm paying for it. There are too many free streaming services available now.

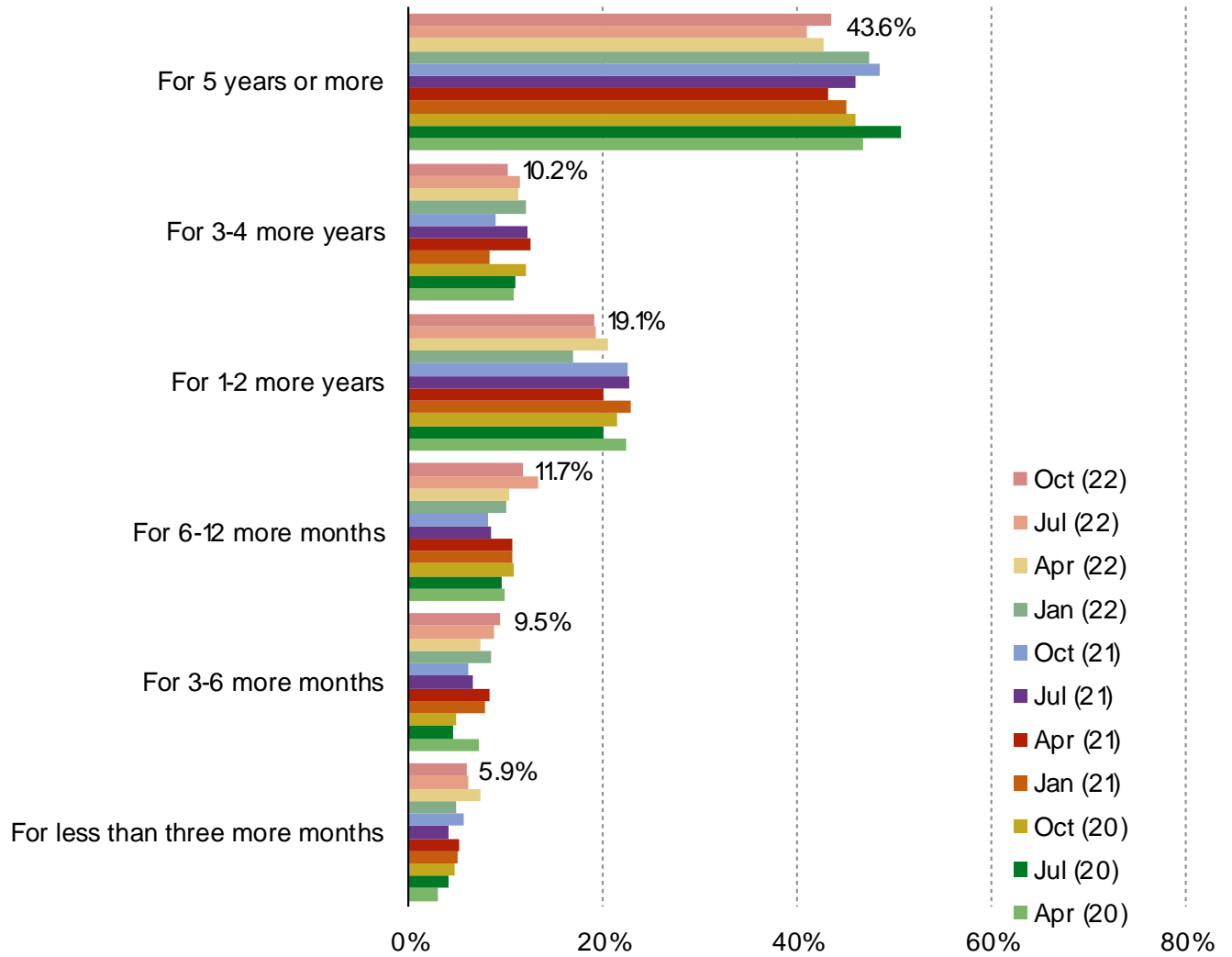
The price keeps going up

Boring content

Their original content is getting worse with reality shows and poorly done documentaries

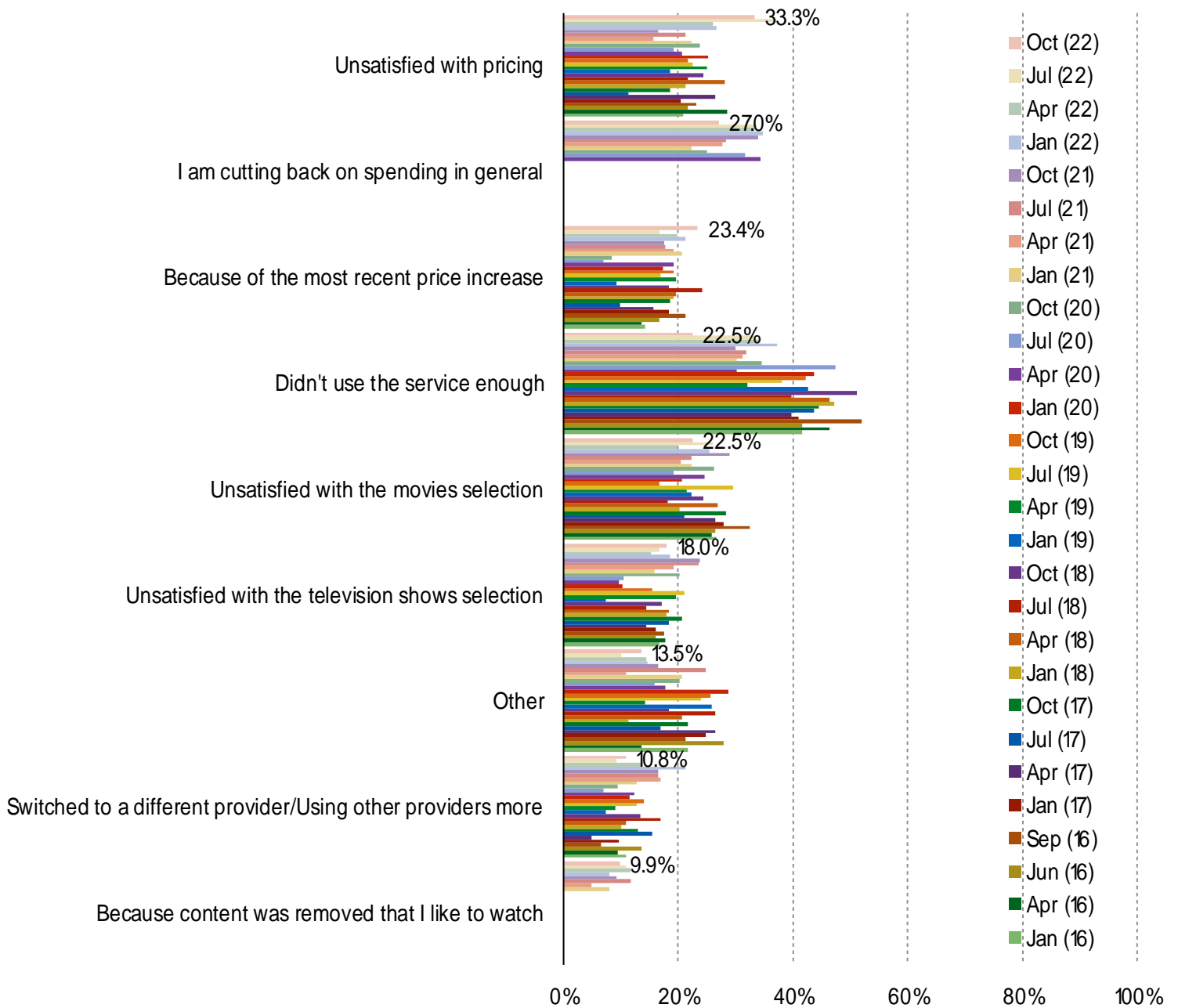
FOR HOW MUCH LONGER DO YOU EXPECT TO BE A NETFLIX SUBSCRIBER?

Posed to Netflix subscribers



FORMER NETFLIX SUBSCRIBERS – WHY DID YOU CANCEL?

Posed to former Netflix subscribers.

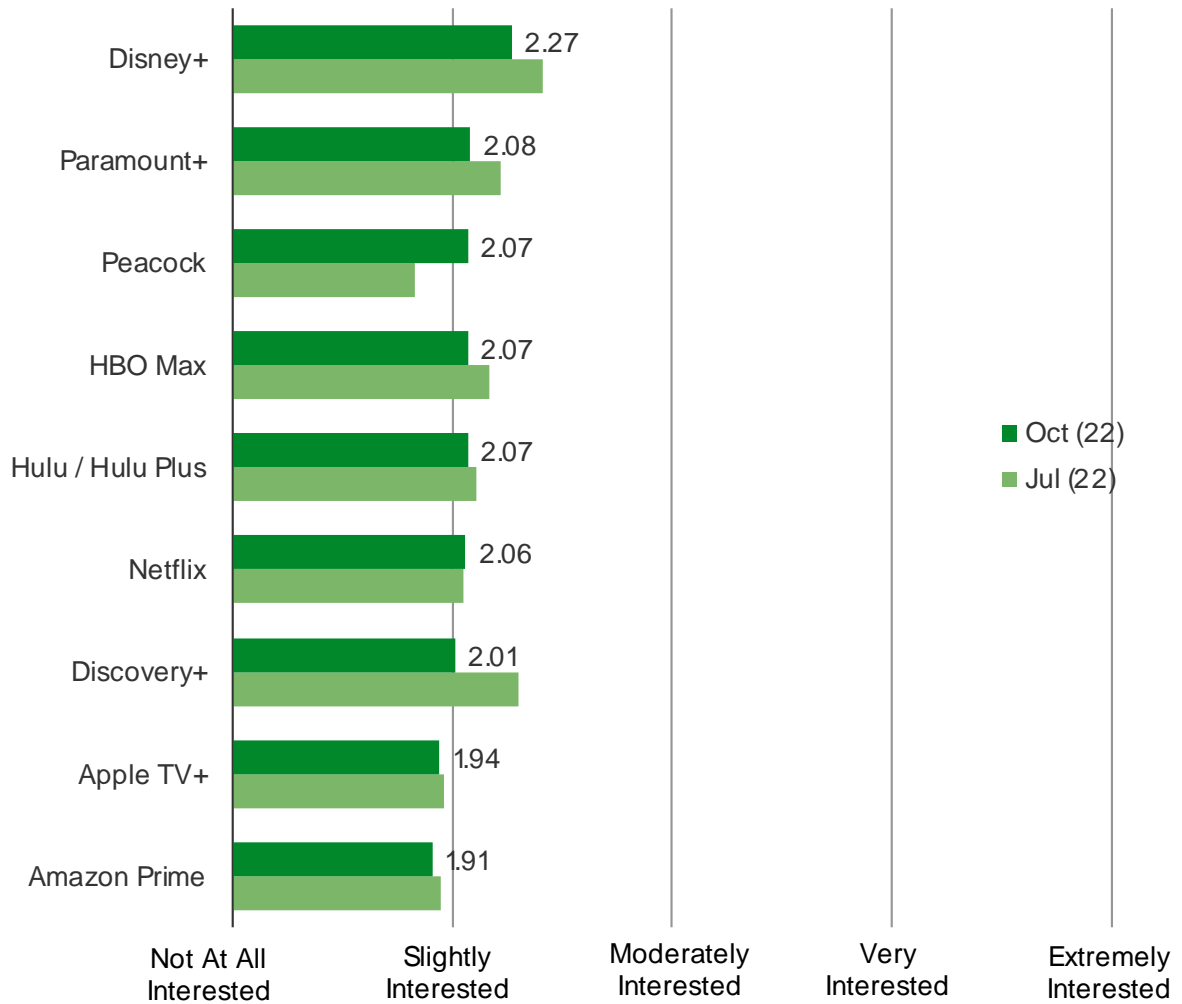


Streaming Wars

MOBILE GAMES AND STREAMING PLATFORMS

HOW MUCH INTEREST WOULD YOU HAVE IN PLAYING MOBILE GAMES BASED ON SHOWS/CHARACTERS FROM THE FOLLOWING PLATFORMS?

Posed to respondents who use each of the following platforms.



	N=
Netflix	593
Hulu / Hulu Plus	368
HBO Max	261
Amazon Prime	499
Apple TV+	101
Peacock	223
Discovery+	93
Paramount+	197
Disney+	332