

Bespoke Survey Research

July 2023

Streaming Video Survey

Volume 41 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: NFLX, DIS, T, CMCSA.

KPIs and Key questions

ACCOUNT SHARING

The percentage of Netflix subscribers who say they share accounts with folks outside their household has declined sequentially. Among sharers, cohorts report receiving the email from Netflix about sharing.

STANDARD WITH ADS

Awareness of Standard with Ads has increased sequentially in our survey. Among those who have subscribed to Standard with Ads, most of the feedback indicates that the experience has been better than anticipated on all fronts. Pricing expectations and commercial load expectations have been constructive and unchanged sequentially.

NETFLIX SUBSCRIBER SENTIMENT

Engagement dynamics are in-line to better than prior waves. Satisfaction with value is improved relative to readings in late 2022. Pricing power isn't quite where it was during the peak of Covid, but feedback on this front has improved in 2023 through present. The percentage of Netflix subscribers who are considering cancelling fell again q/q.

CABLE NEWS SHOWS

Cable news and live sports are more important to Cable subscribers than they are to non-Cable subs. There is some demand by consumers for cable news personalities to come to them directly on social media or on streaming platforms. Importantly, the youngest cohorts are the most likely to be interested in connecting with personalities they watch directly on social media.

Noteworthy Stats:

67.0% Of respondents who are Netflix subscribers but are not on the ad supported plan are unlikely to very unlikely to switch to the basic with ads plan in the next month.

14.7% Of respondents who DO NOT use Netflix to watch video content at home noted that they are likely to very likely to subscribe to an ad supported version from Netflix.

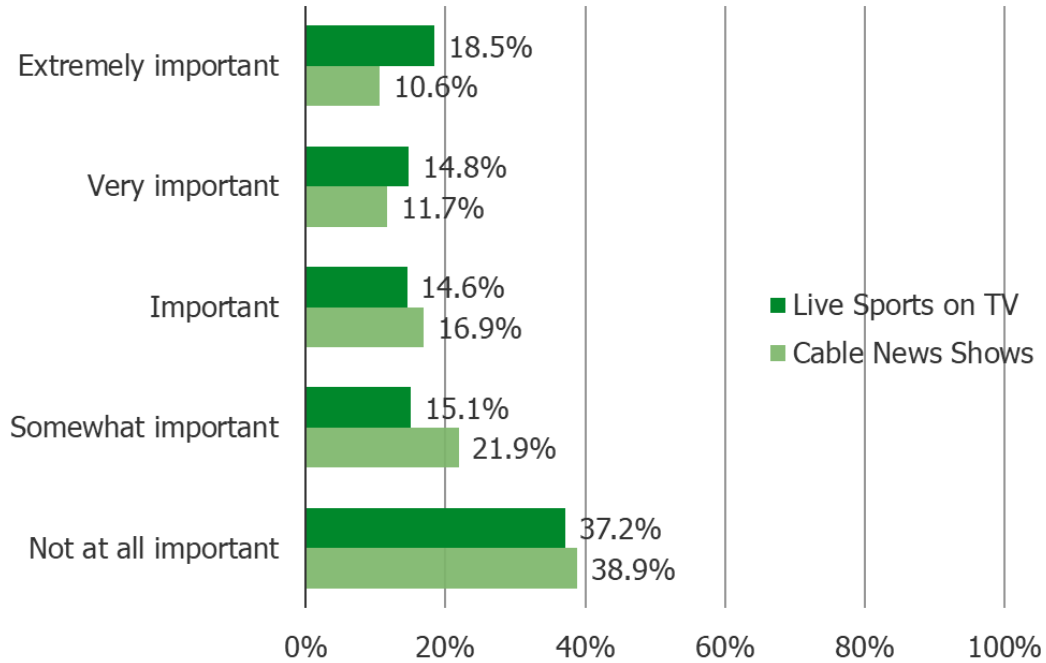
65.8% Of those sharing Netflix with more than one person outside of their household recall recently receiving an email from Netflix about not sharing their account.

46.9% Of respondents consider Netflix to be a "need to have."

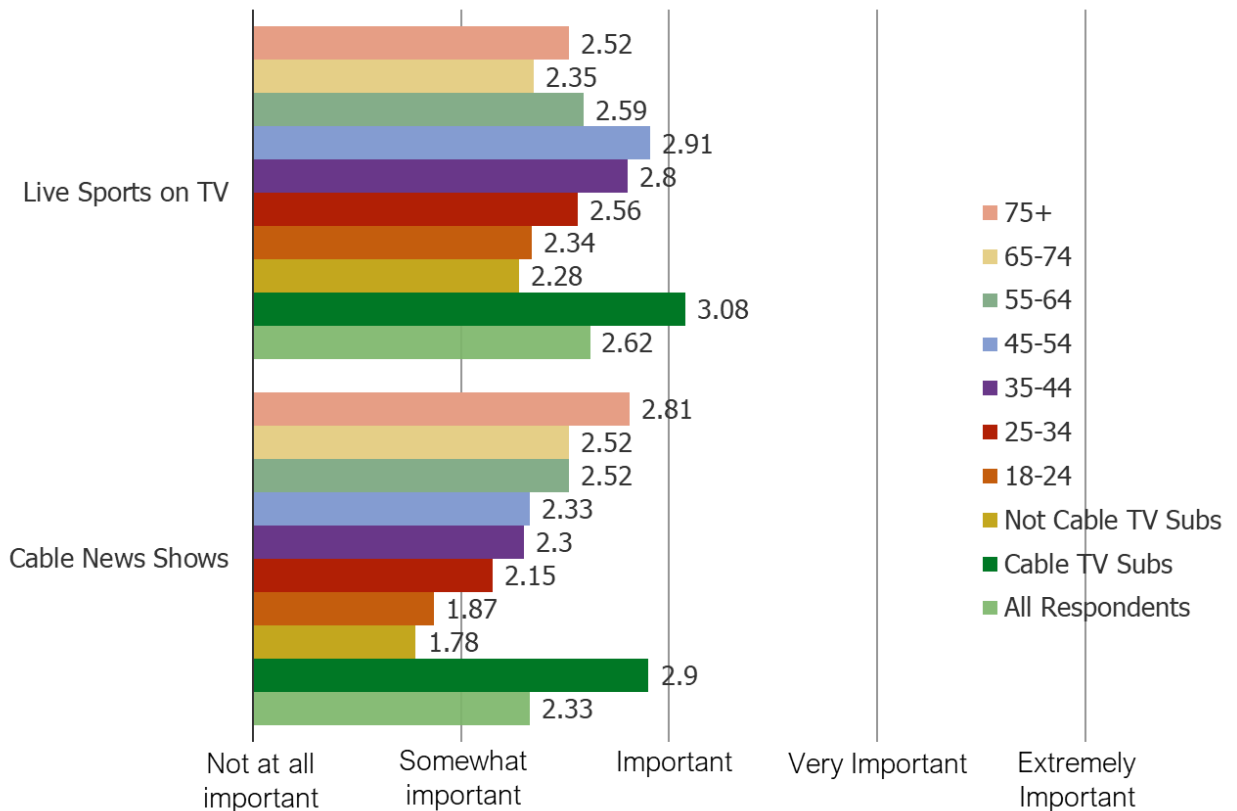
CABLE TV PERSONALITIES AND LIVE SPORTS/EVENTS

HOW IMPORTANT ARE THE FOLLOWING TO YOU...

Posed to all respondents.

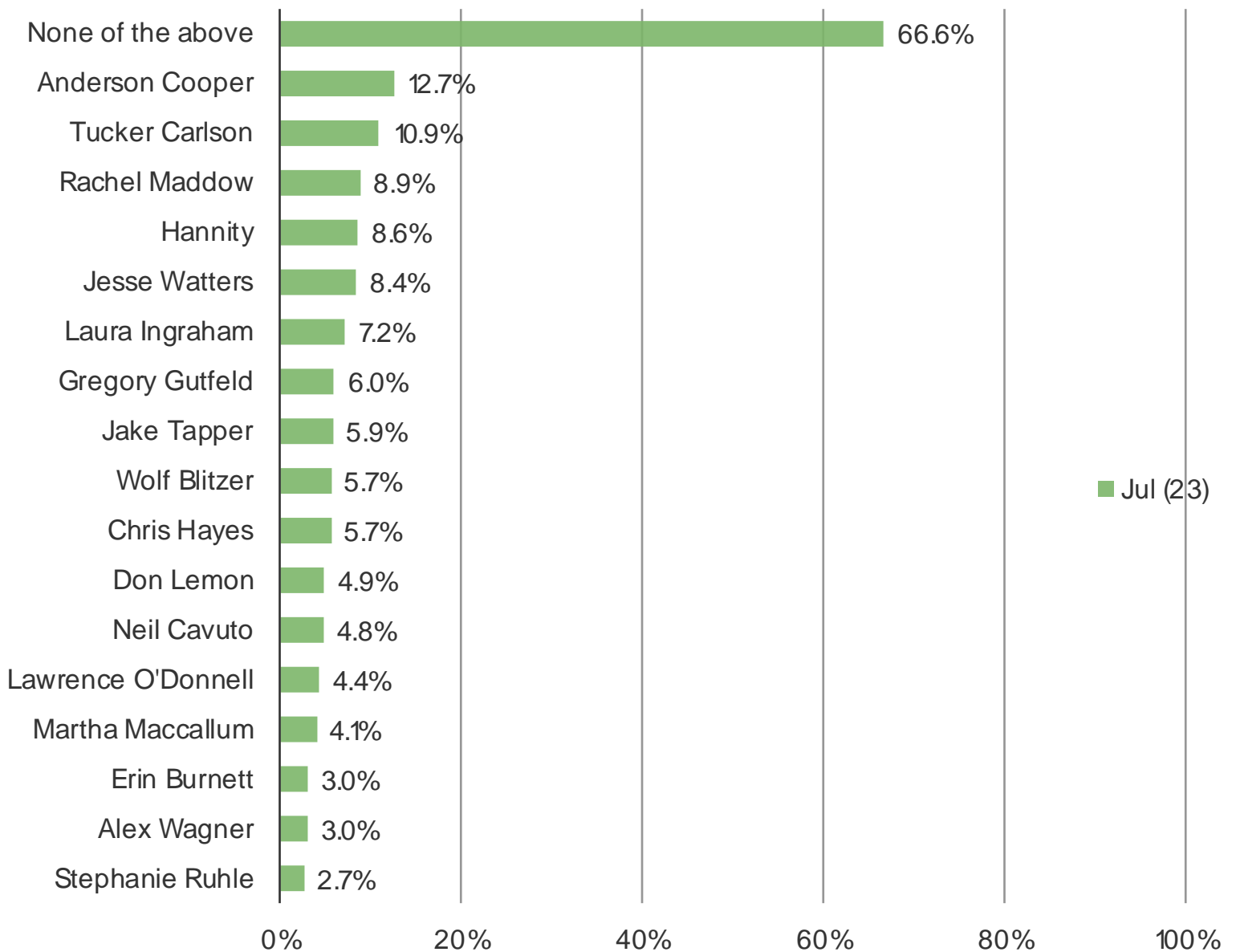


Cross-Tabs (Weighted Averages)



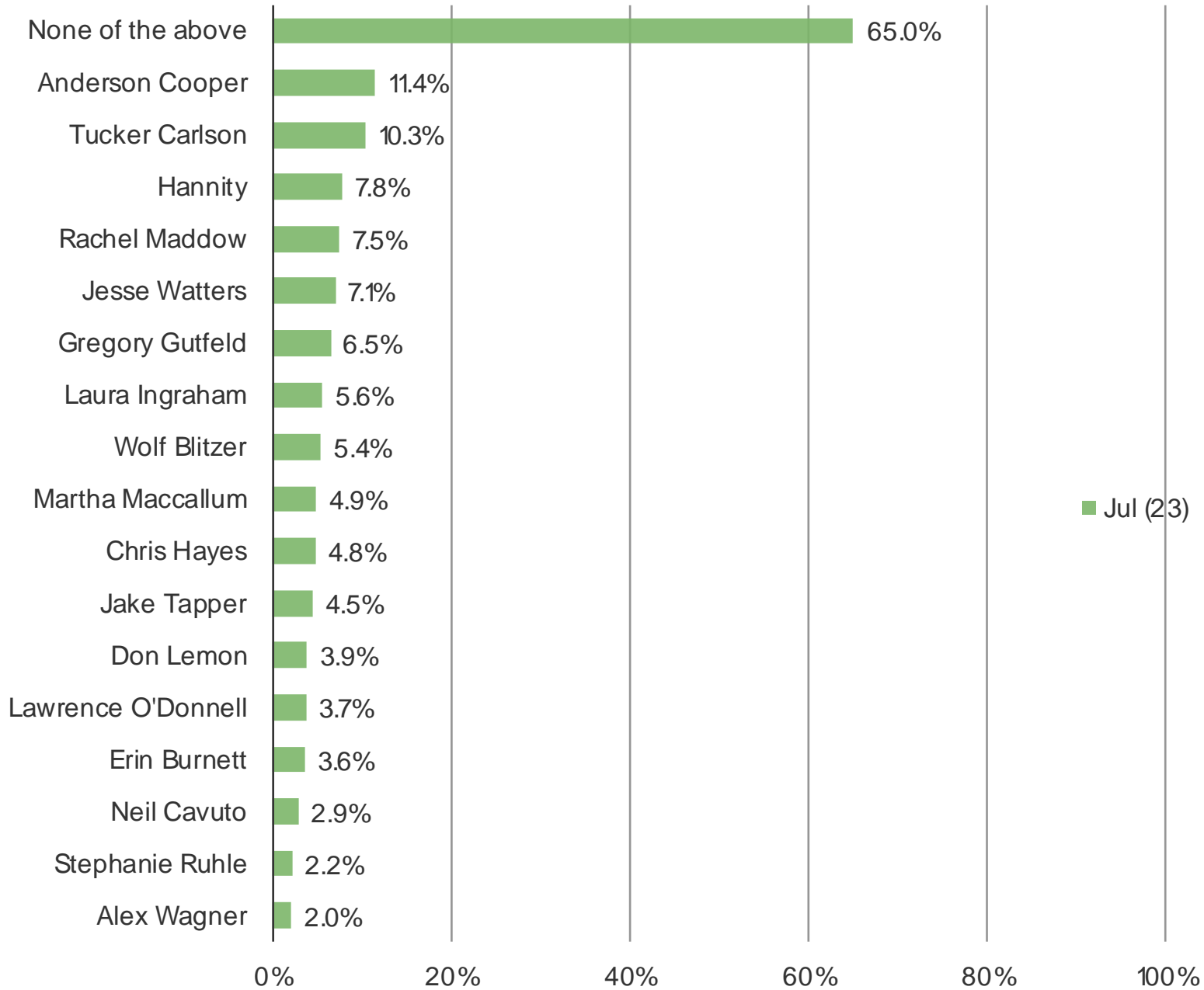
DO YOU WATCH ANY OF THE FOLLOWING REGULARLY? SELECT ALL THAT APPLY

Posed to all respondents.



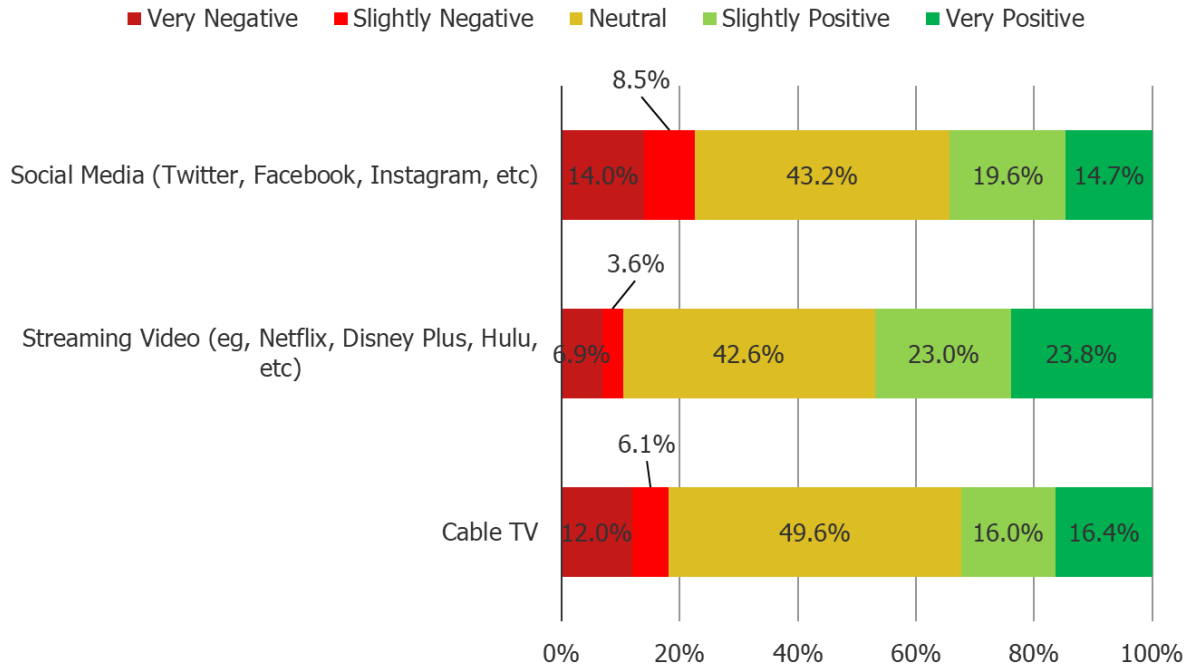
DO YOU CONSIDER YOURSELF A FAN OF ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.

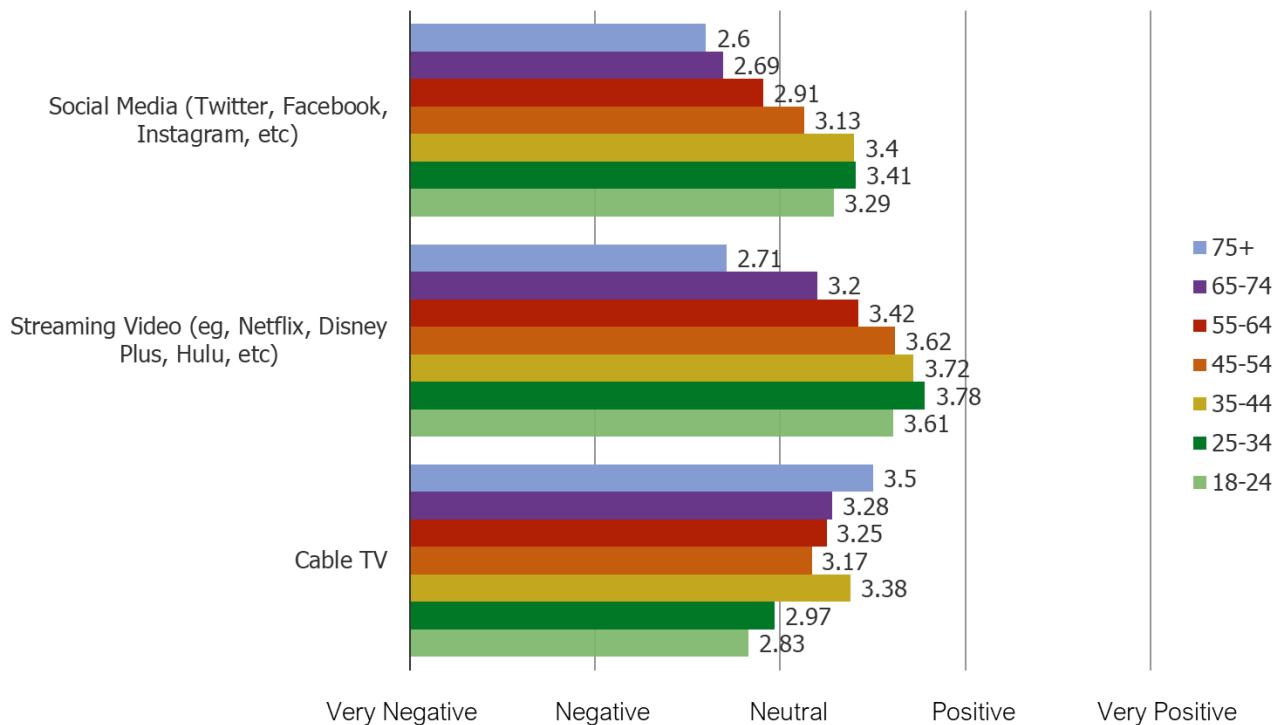


HOW DO YOU FEEL ABOUT WATCHING YOUR FAVORITE CABLE MEDIA PERSONALITIES ON THE FOLLOWING PLATFORMS?

Posed to all respondents.

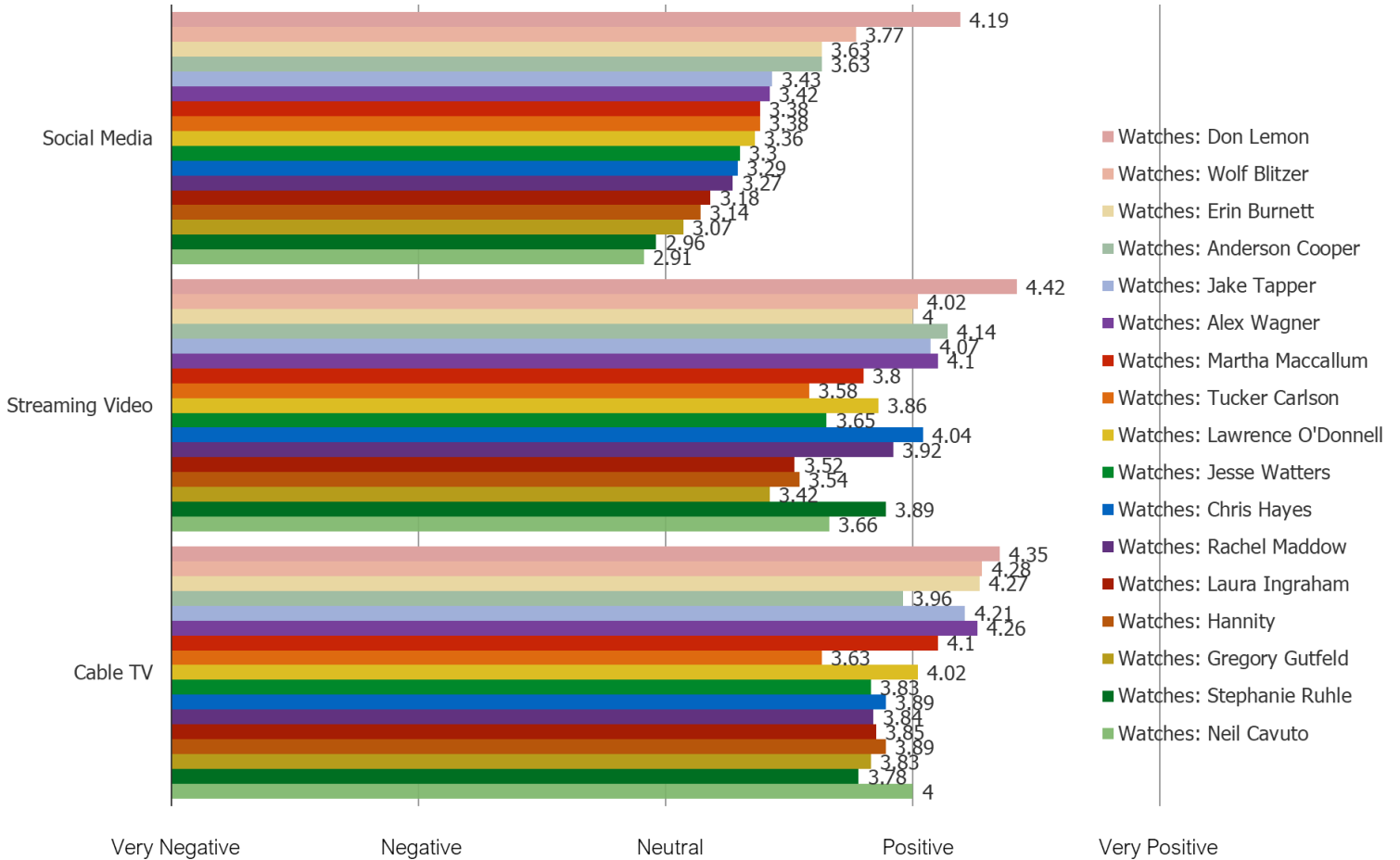


Cross-Tabs (Weighted Averages)



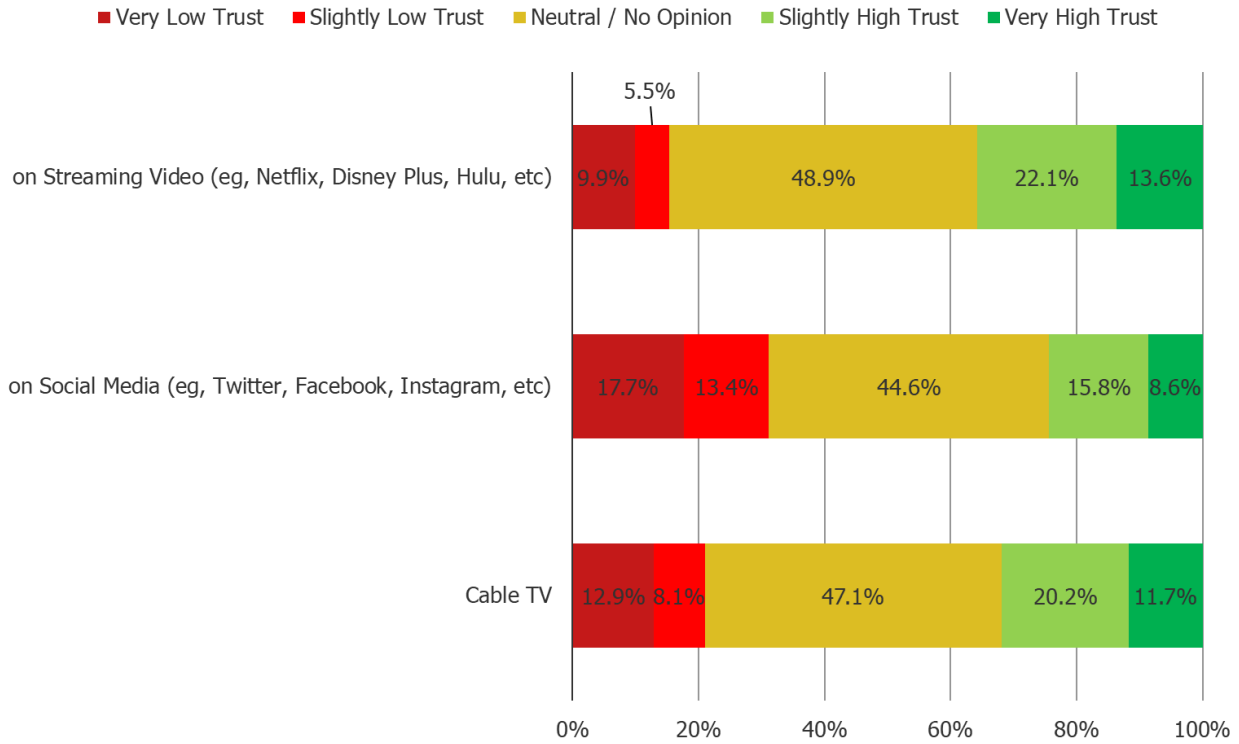
HOW DO YOU FEEL ABOUT WATCHING YOUR FAVORITE CABLE MEDIA PERSONALITIES ON THE FOLLOWING PLATFORMS?

Cross-Tab: Consumers who watch each of the following personalities

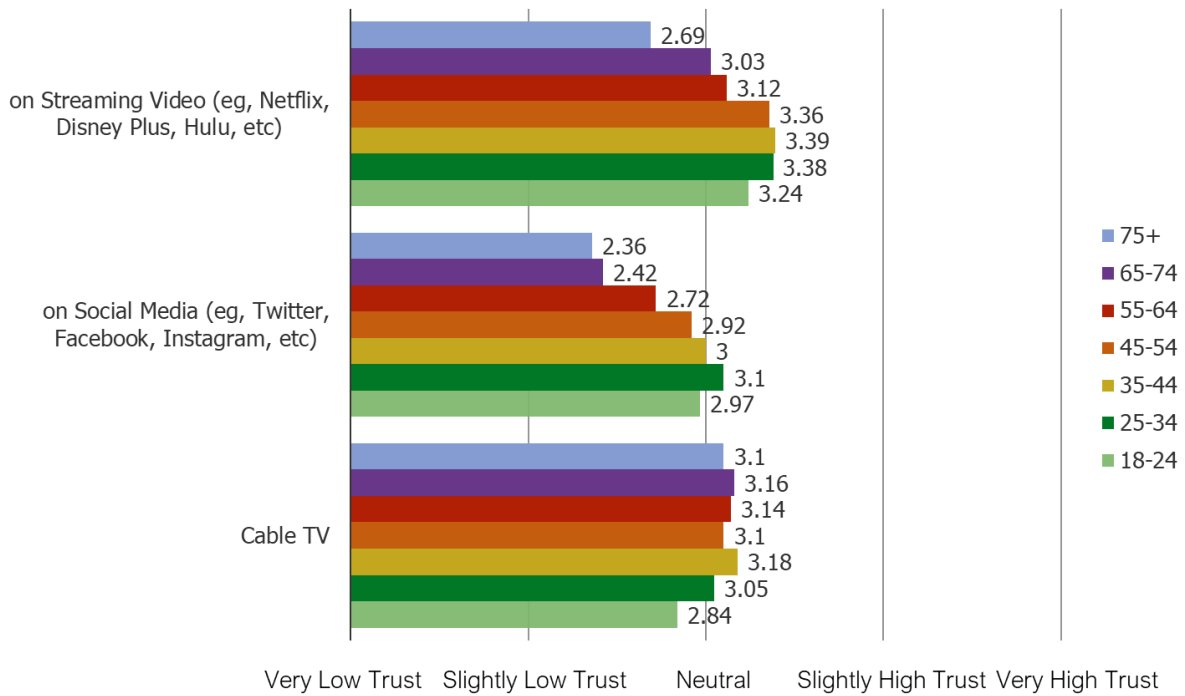


HOW MUCH TRUST DO YOU HAVE IN WATCHING VIDEO OF YOUR FAVORITE CABLE NEWS PERSONALITIES IN THE FOLLOWING FORUMS...

Posed to all respondents.

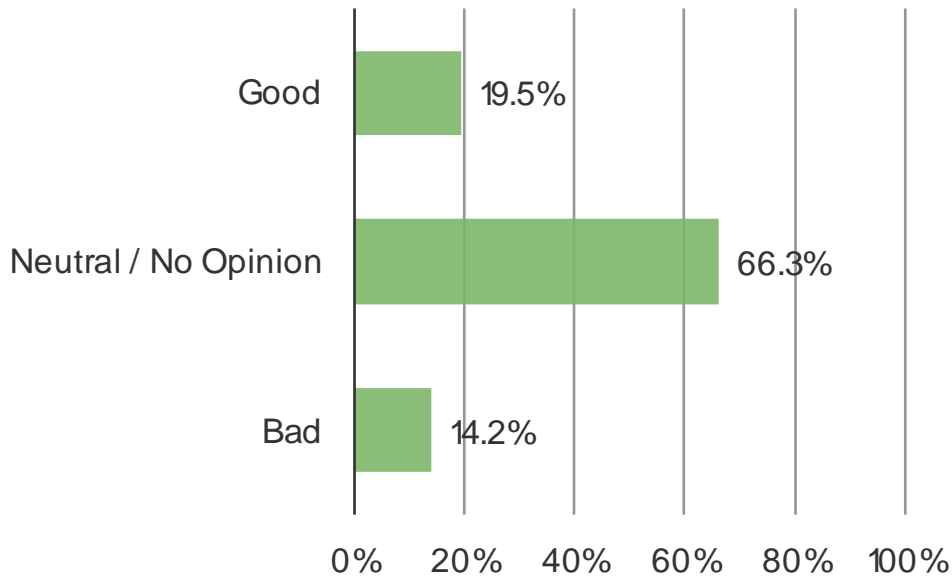


Cross-Tabs (Weighted Averages)

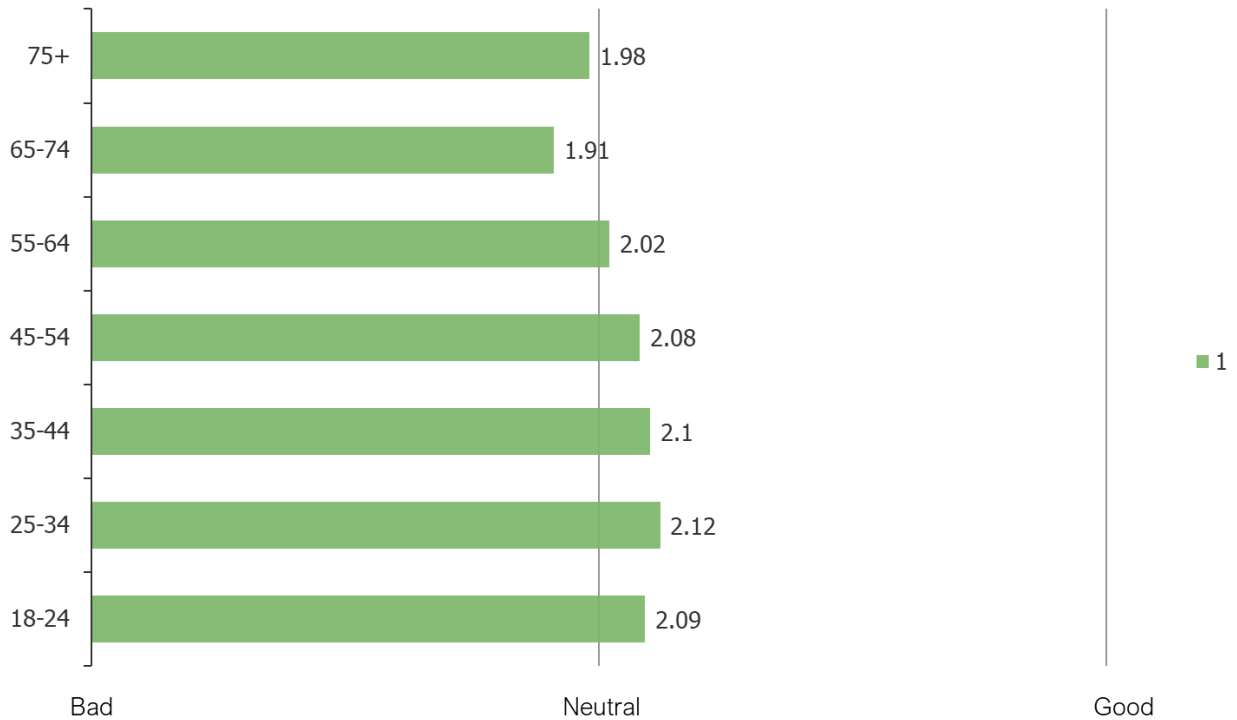


WOULD YOU CONSIDER IT A GOOD OR BAD THING IF YOUR FAVORITE CABLE NEWS PERSONALITY LEFT THE NETWORK AND SPOKE DIRECTLY TO THE AUDIENCE FROM THEIR OWN SOCIAL MEDIA PLATFORM (LIKE TWITTER)?

Posed to all respondents.



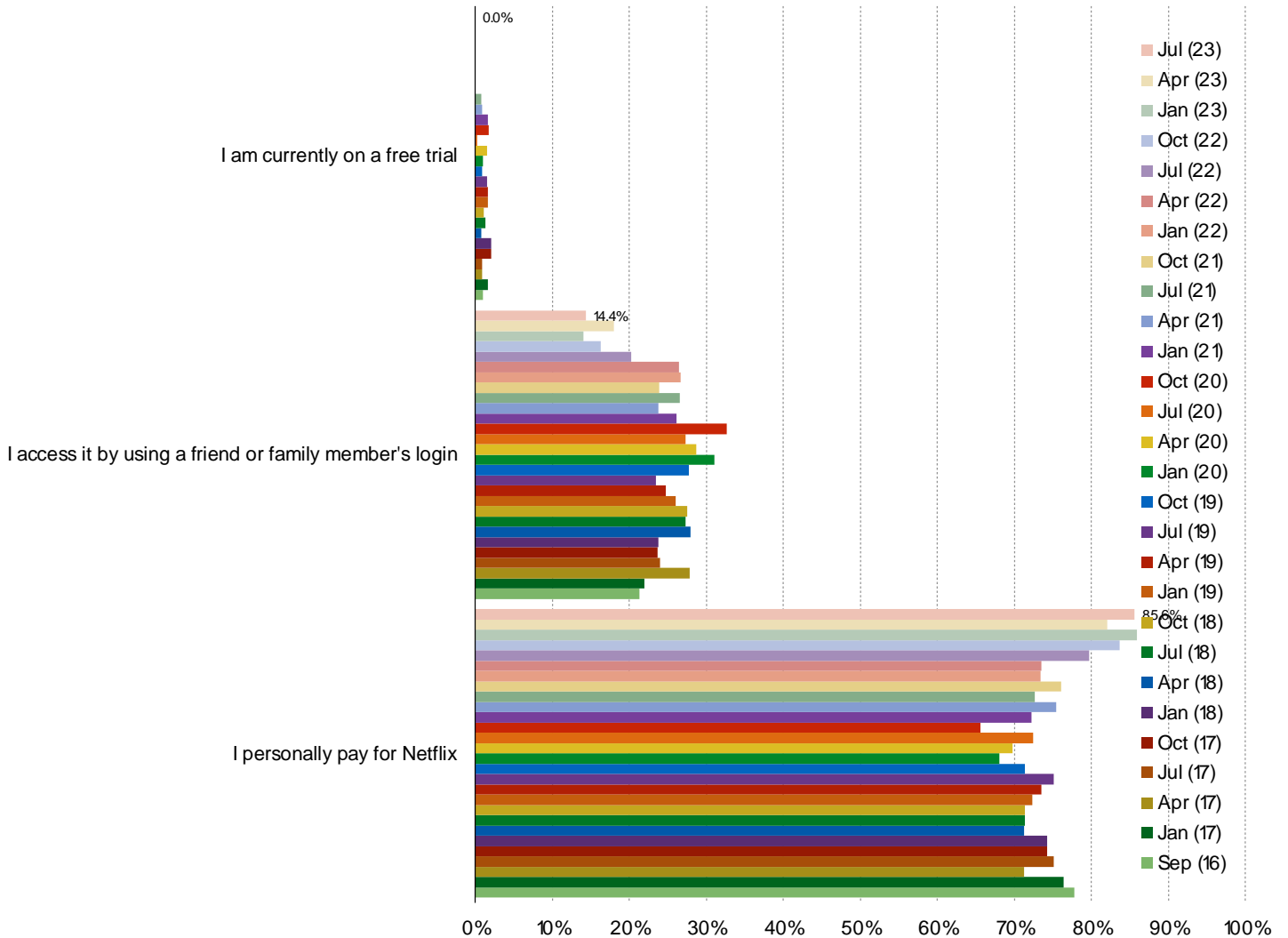
Cross-Tabs (Weighted Averages)



NFLX ACCOUNT SHARING

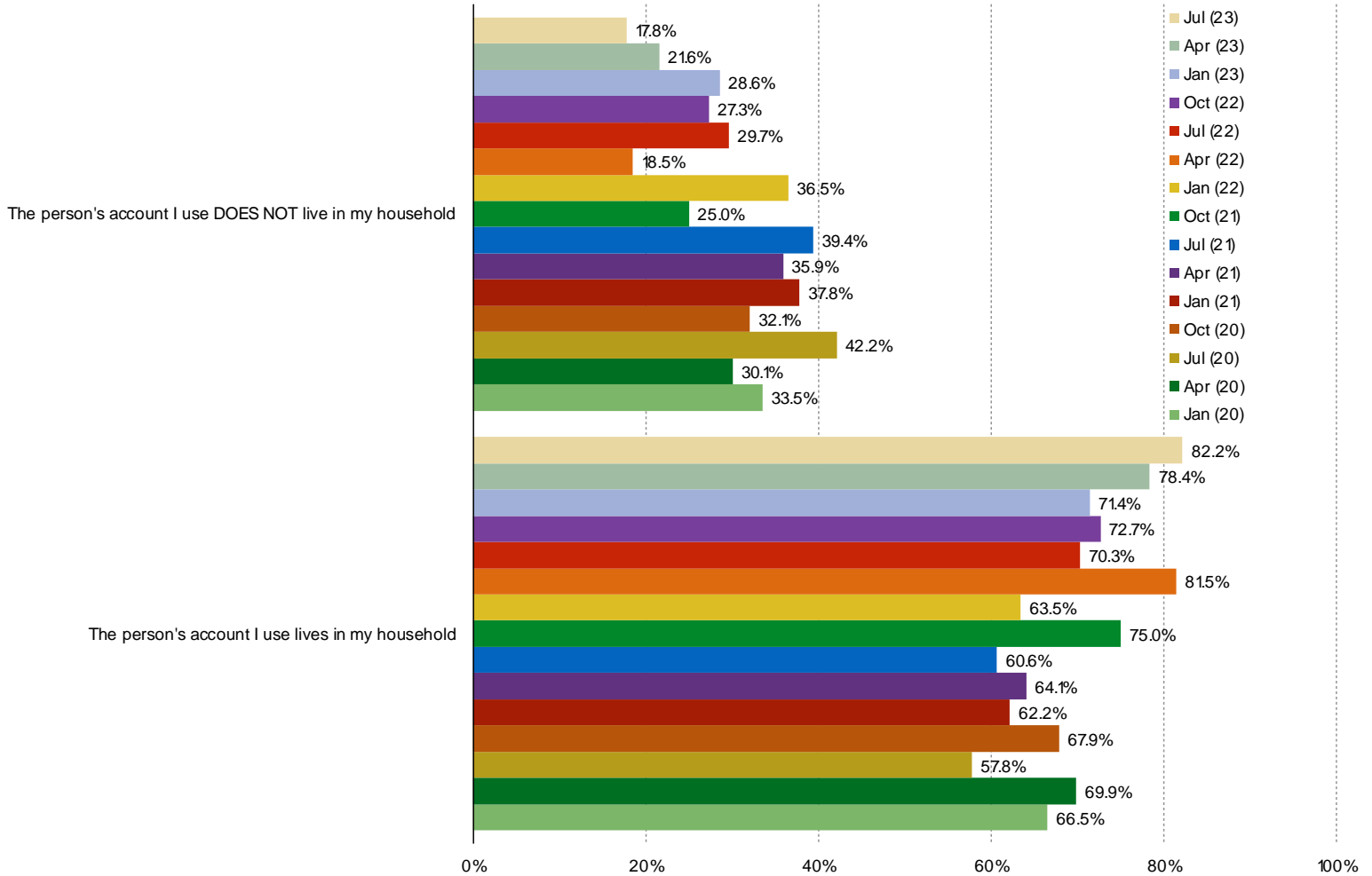
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

Posed to Netflix subscribers.



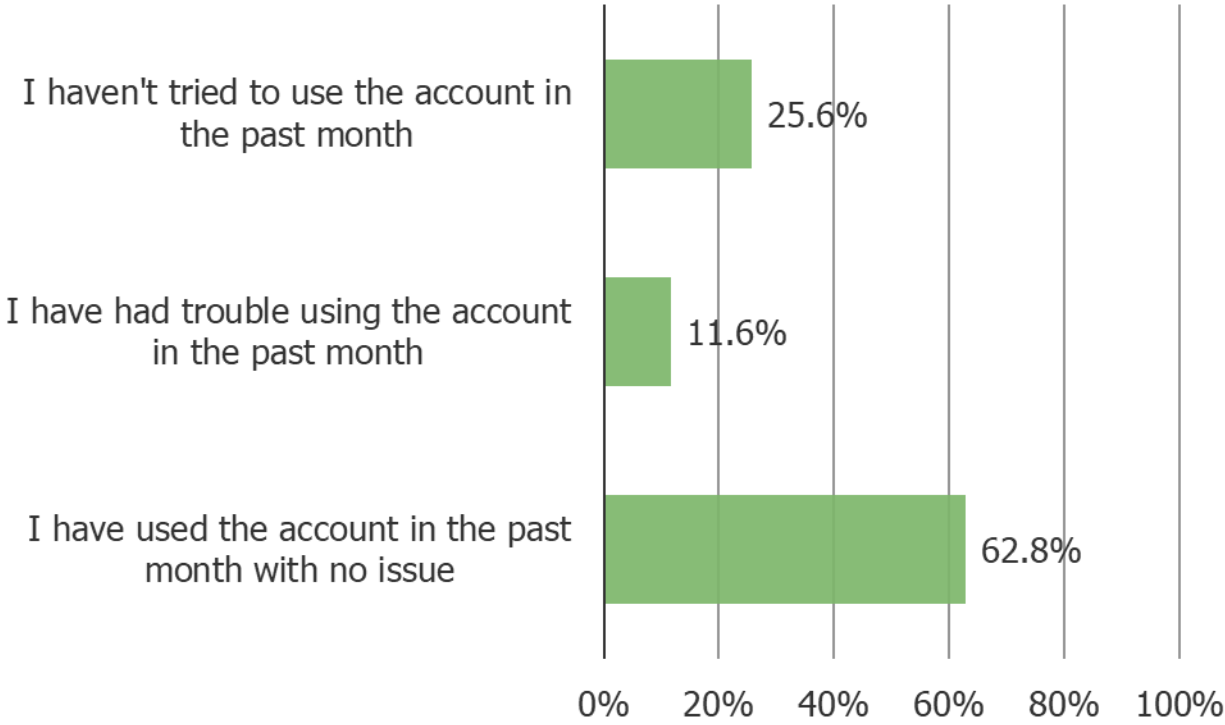
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

Posed to Netflix subscribers who access it by using a family or friend’s login (31% of subscribers).



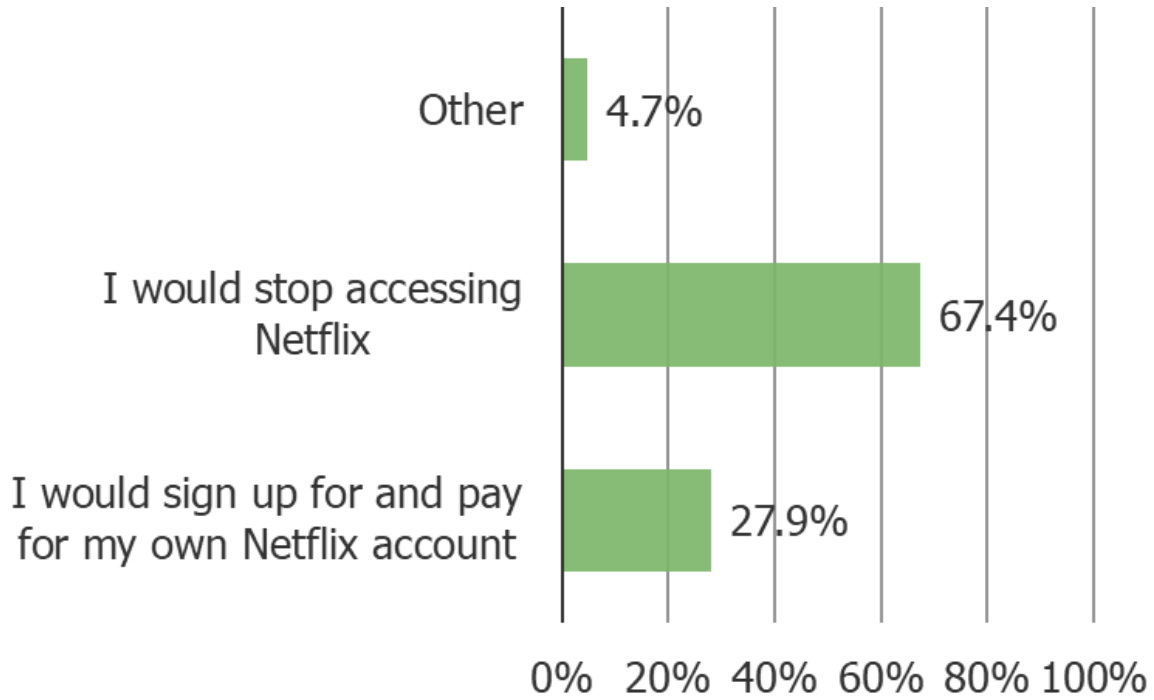
HAVE YOU HAD ANY TROUBLE ACCESSING THE PERSON'S NETFLIX ACCOUNT WHO YOU TYPICALLY USE?

Posed to respondents who said they access someone else's account who they do not live with (N = 43)



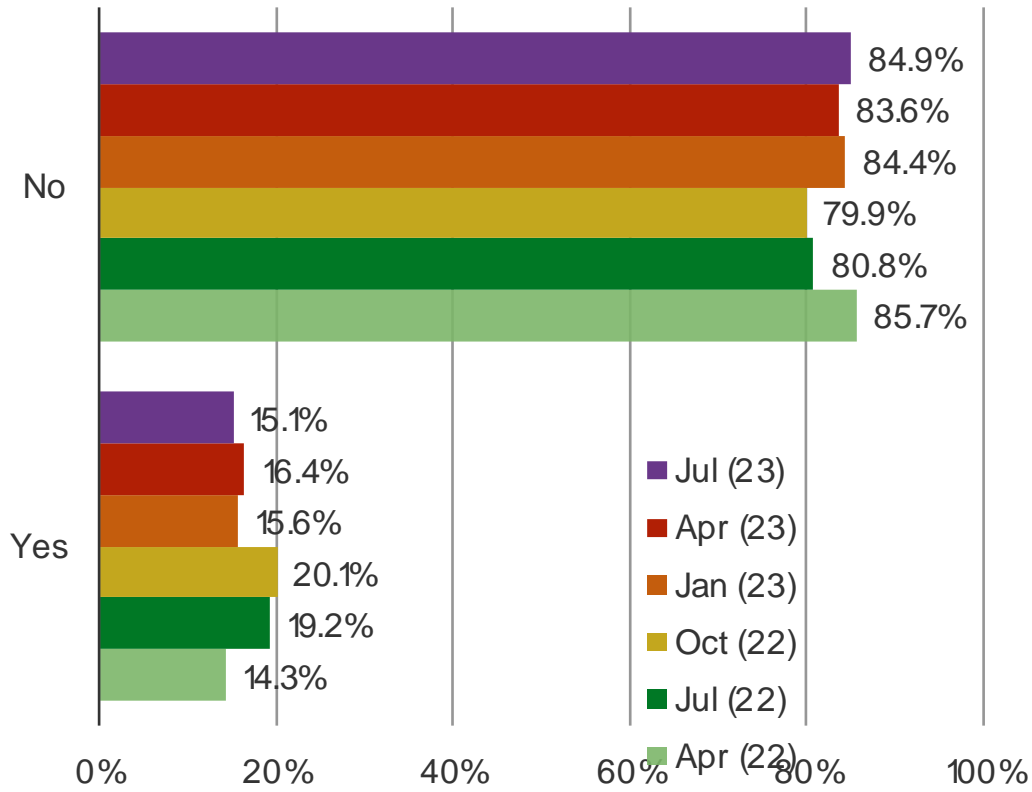
WHICH OF THE FOLLOWING WOULD YOU DO IF NETFLIX NO LONGER ALLOWED THE PERSON WHOSE ACCOUNT YOU ACCESS TO SHARE THEIR NETFLIX ACCOUNT WITH YOU FOR FREE

Posed to respondents who said they access someone else's account who they do not live with (N = 43)



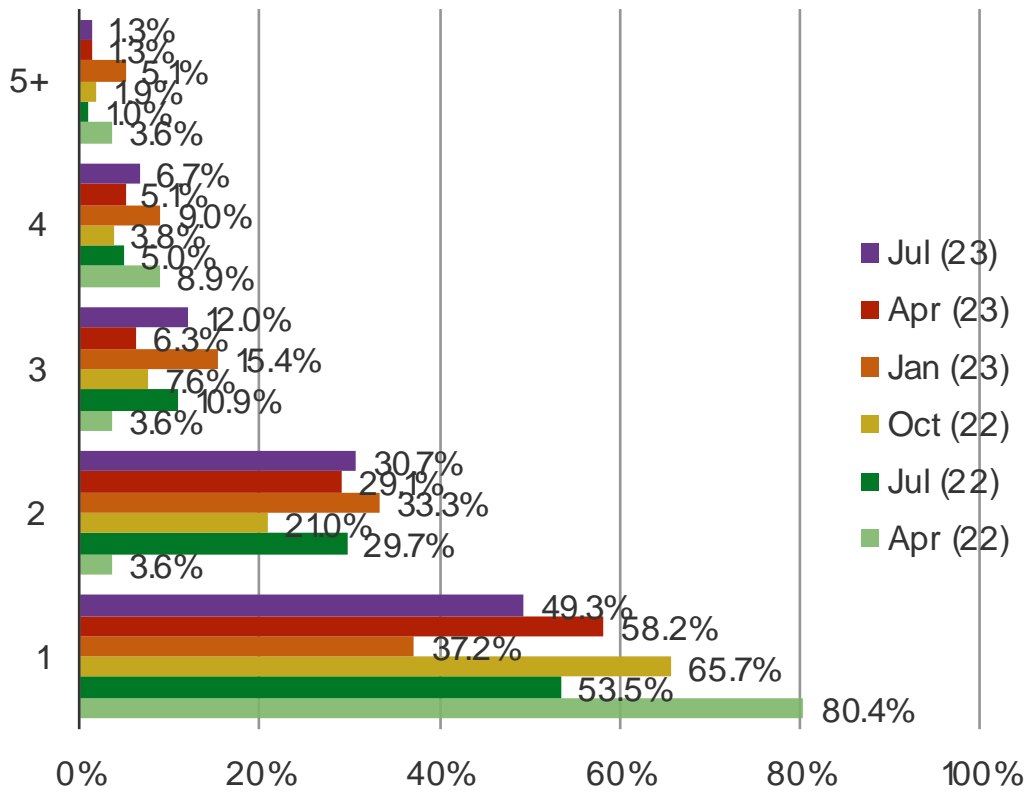
DO YOU LET ANYONE LIVING OUTSIDE OF YOUR HOUSEHOLD USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix or lives with someone who pays for Netflix (N=497).



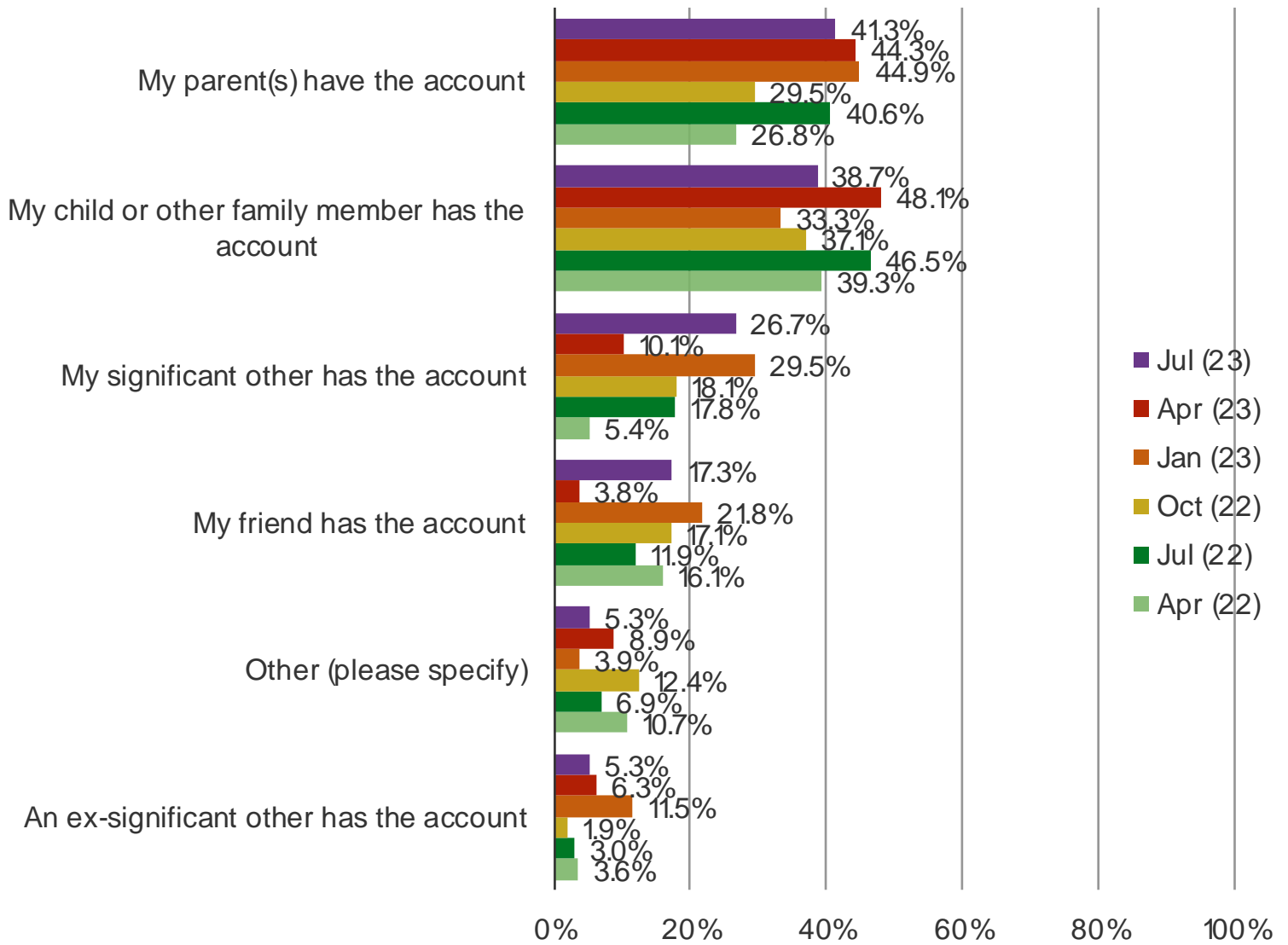
HOW MANY PEOPLE WHO LIVE OUTSIDE OF YOUR HOUSEHOLD DO YOU LET USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 75)



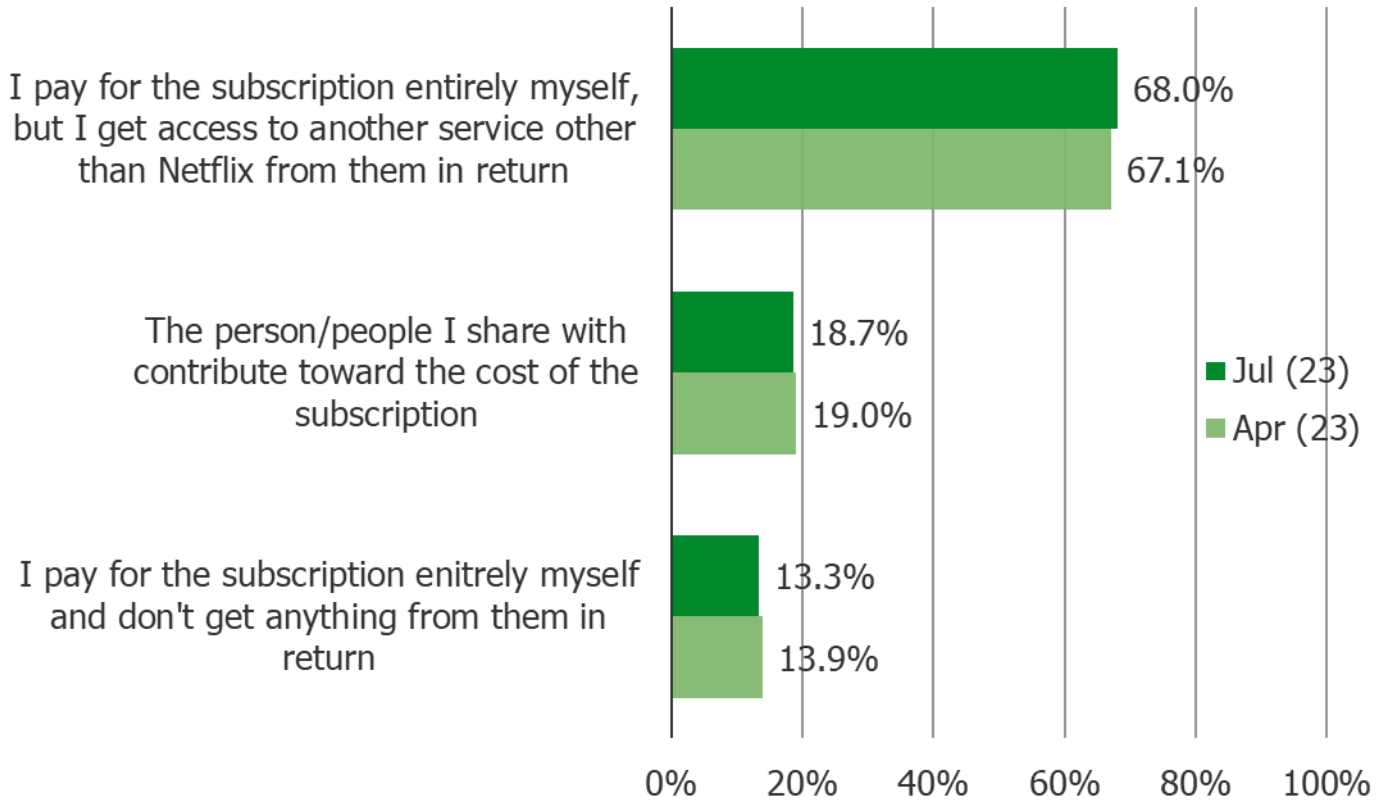
WHAT IS YOUR RELATION TO THE PERSON WHOSE NETFLIX ACCOUNT YOU ACCESS?

Posed to respondents who access someone’s Netflix account who they do not live with (N = 75).



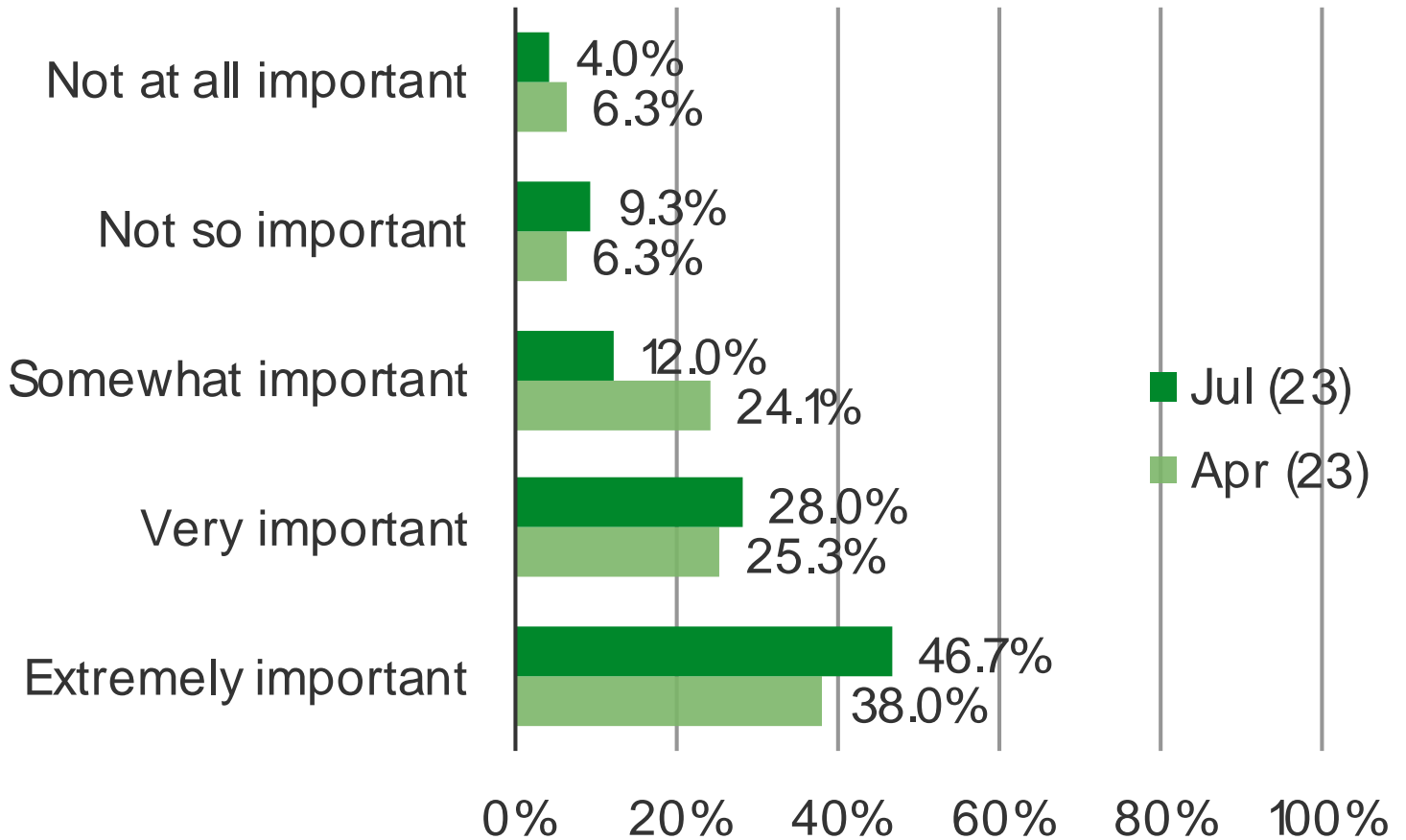
THINKING OF THE PERSON/PEOPLE YOU SHARE YOUR ACCOUNT WITH, WHO PAYS FOR THE SUBSCRIPTION?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=75)



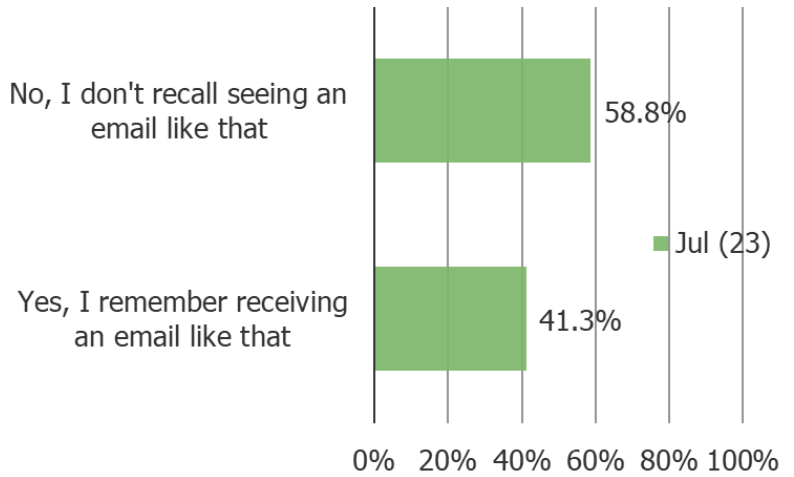
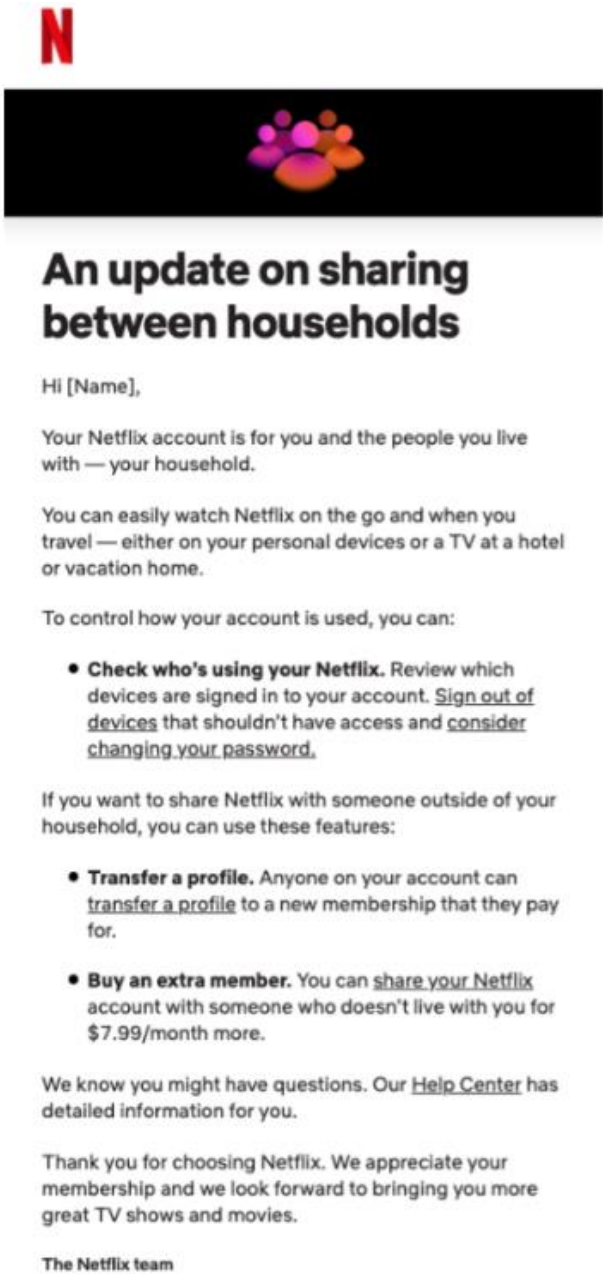
HOW IMPORTANT IS IT TO YOU TO BE ABLE TO SHARE YOUR NETFLIX ACCOUNT WITH PEOPLE WHO LIVE OUTSIDE OF YOUR HOME?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=75)

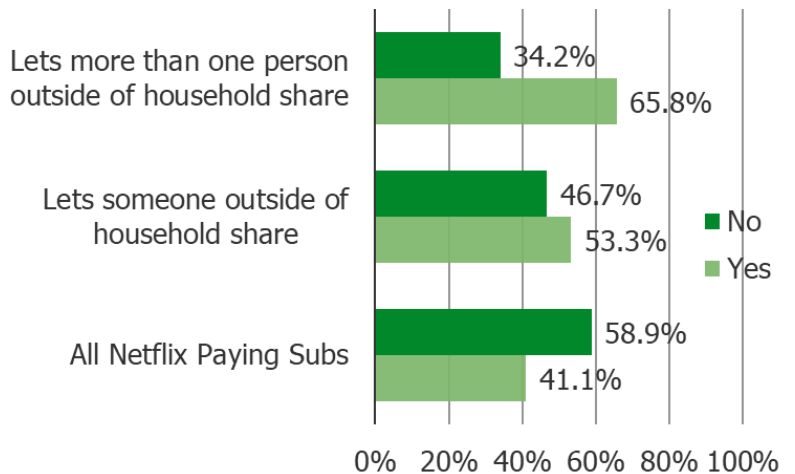


HAVE YOU RECEIVED AN EMAIL LIKE THE ONE BELOW FROM NETFLIX IN THE PAST 1-2 MONTHS?

Posed to paying Netflix subscribers (N = 499)

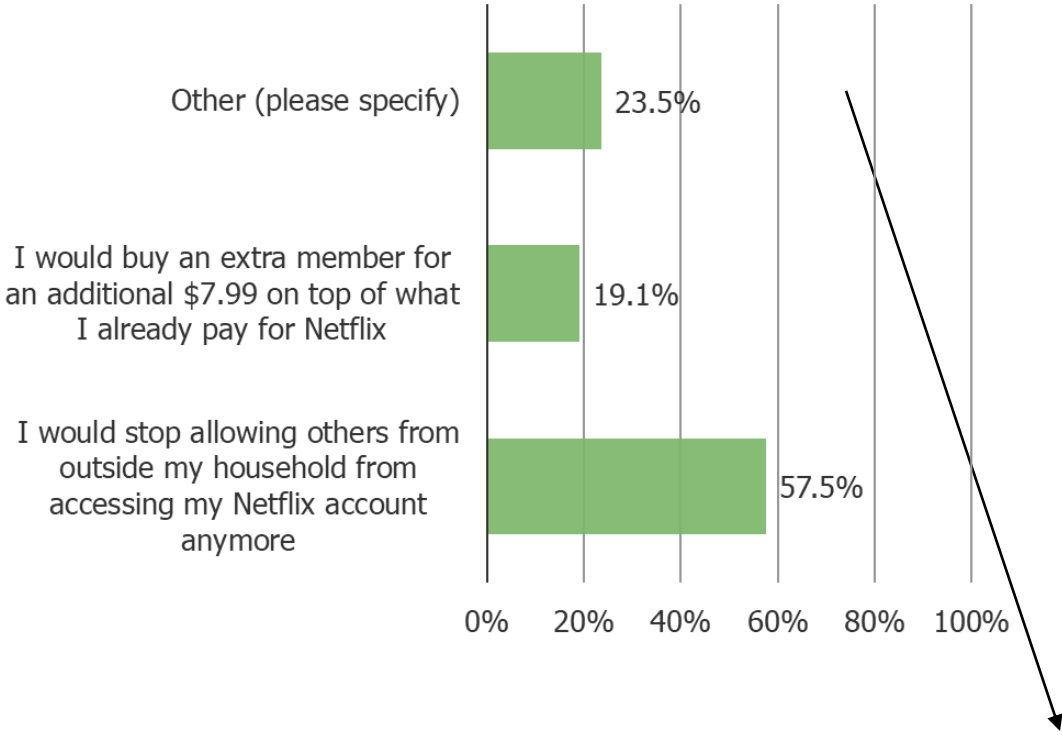


Cross-Tabs



IF YOU RECEIVED THIS EMAIL FROM NETFLIX, HOW WOULD YOU RESPOND?

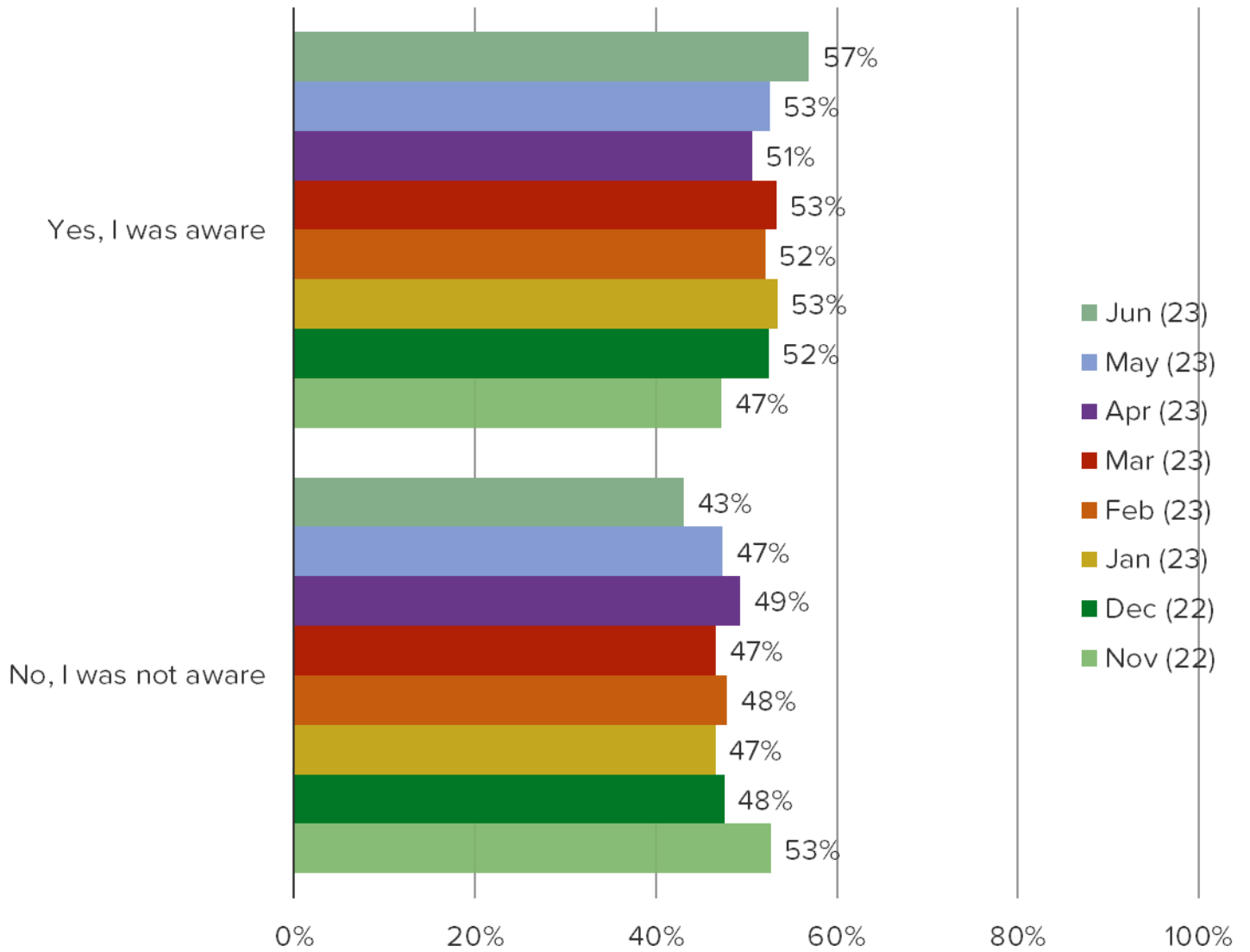
Posed to paying Netflix subscribers who have not received the email from Netflix (N = 294)



STANDARD WITH ADS

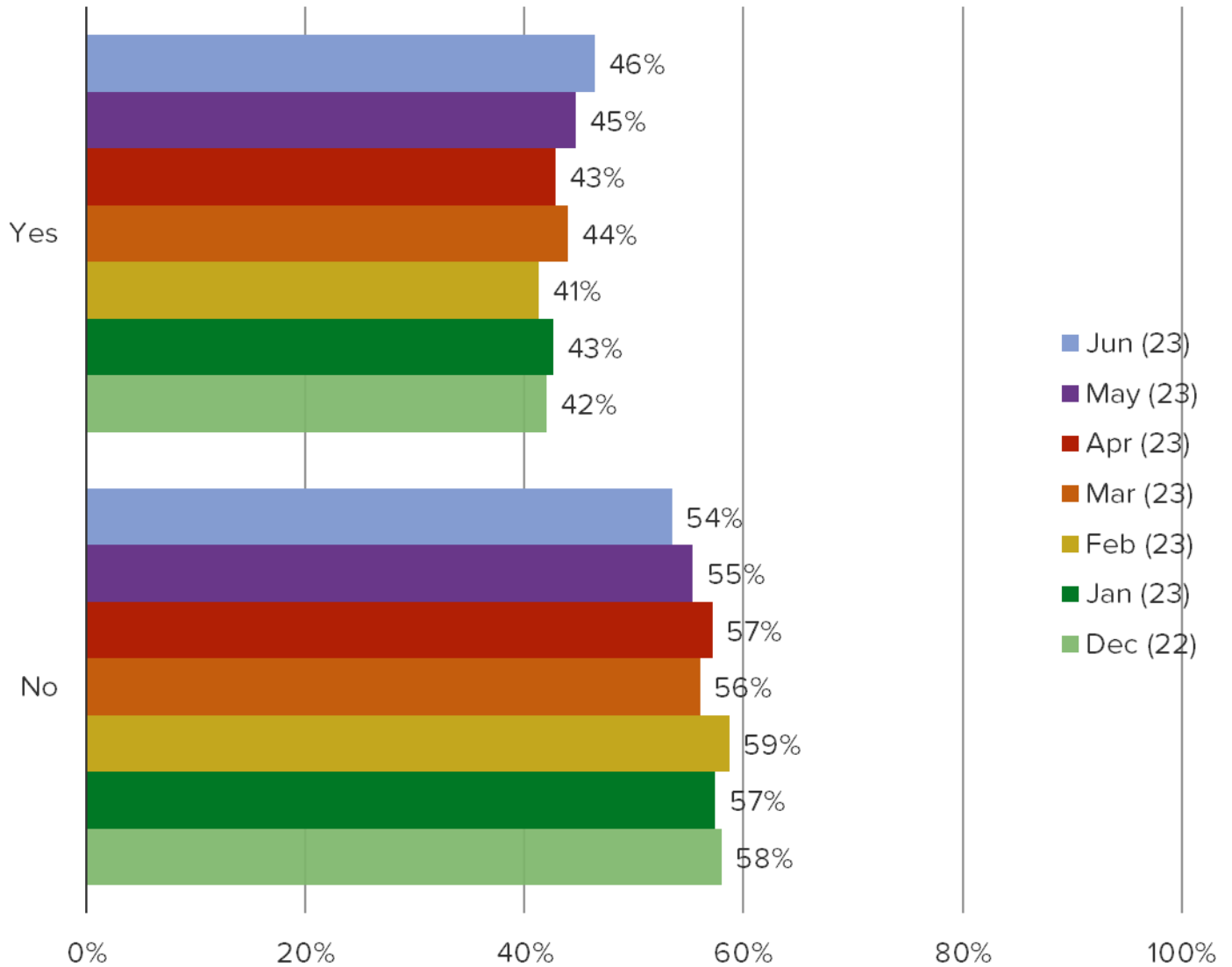
BEFORE TAKING THIS SURVEY, WERE YOU AWARE THAT NETFLIX HAS AN AD-SUPPORTED TIER WITH COMMERCIALS?

Posed to all respondents.



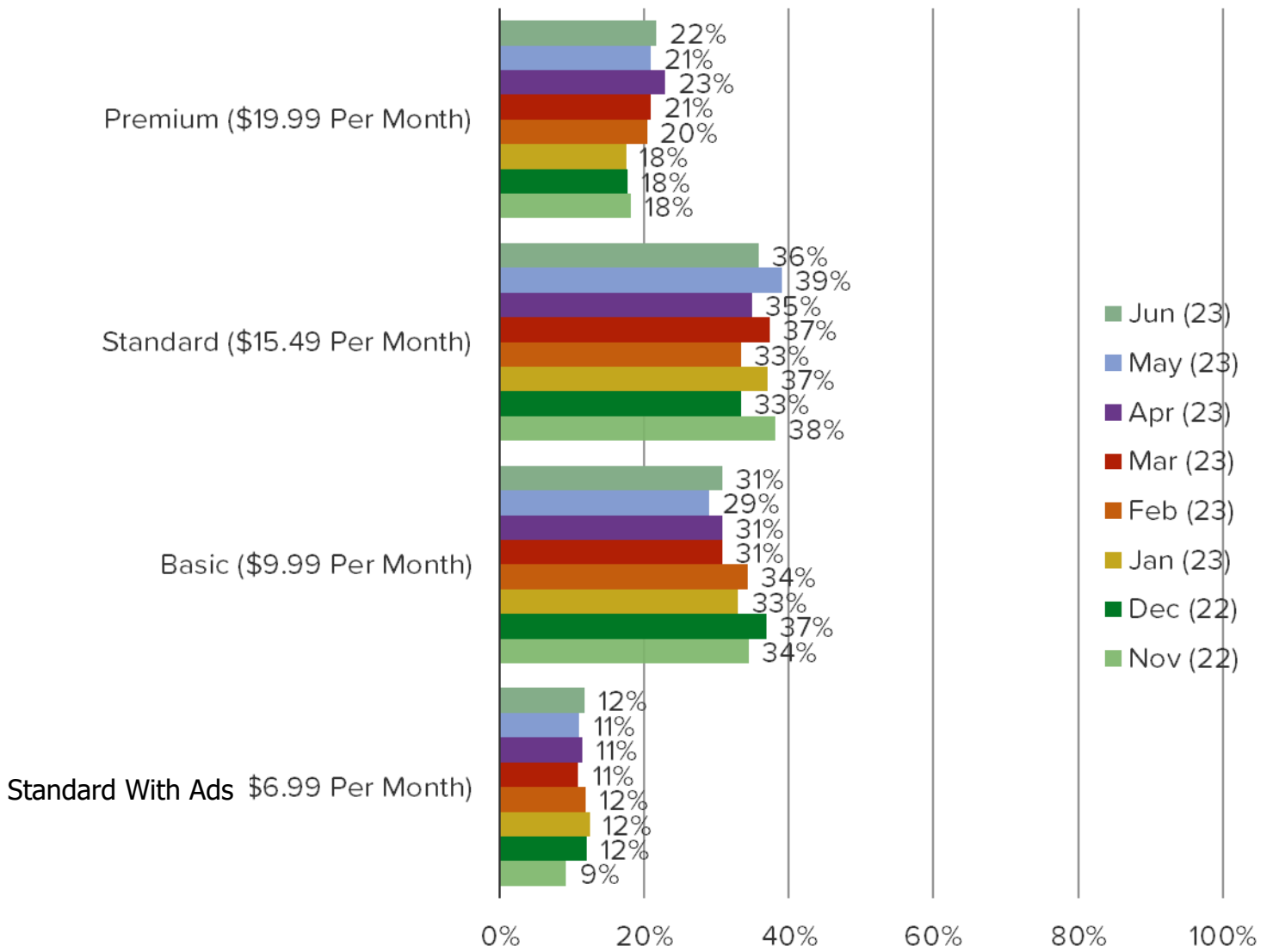
BEFORE TAKING THIS SURVEY, WERE YOU AWARE THAT DISNEY+ HAS AN AD-SUPPORTED TIER WITH COMMERCIALS?

Posed to all respondents.



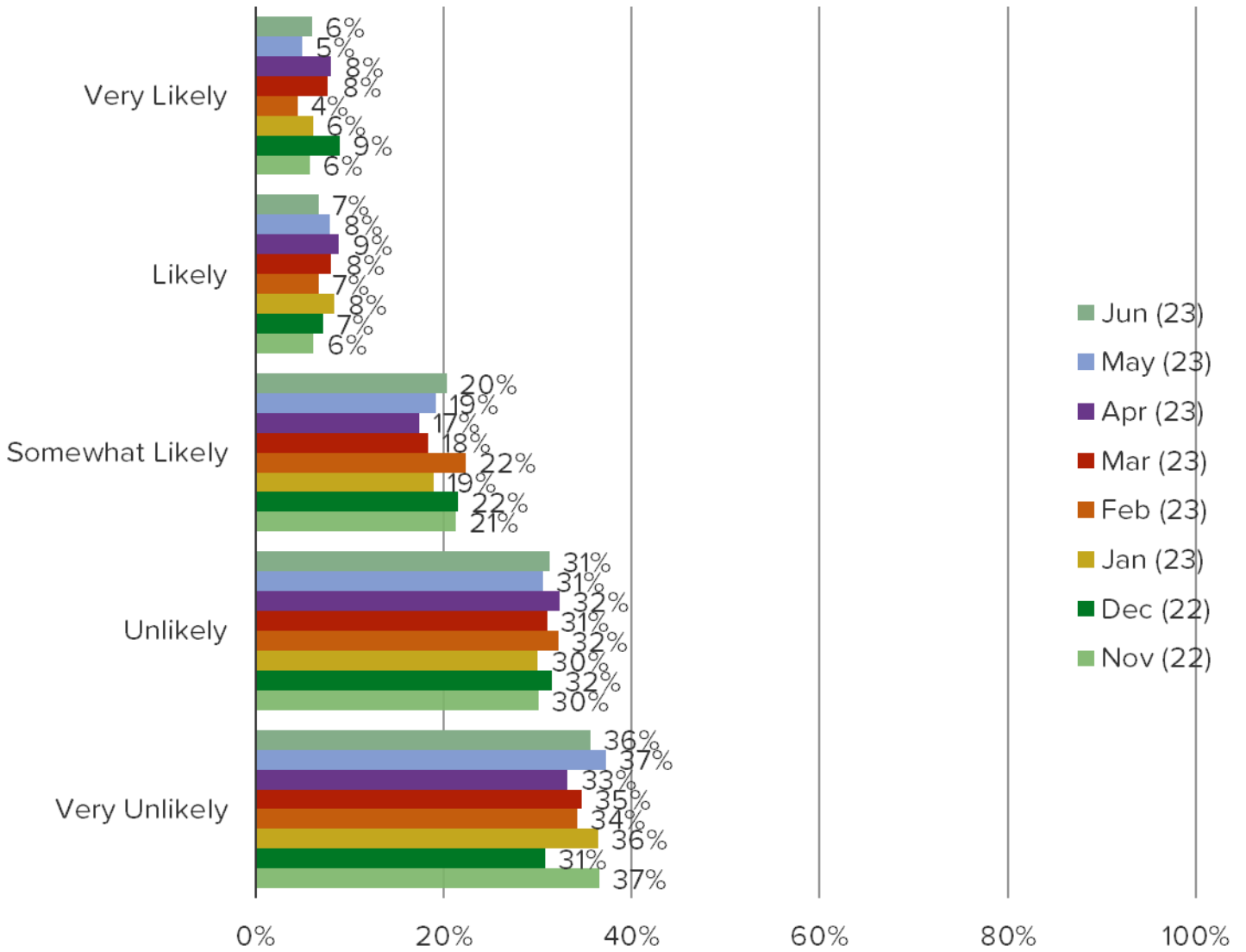
WHICH OF THE FOLLOWING MOST ACCURATELY DESCRIBES YOUR NETFLIX SUBSCRIPTION?

Posed to all respondents who have a Netflix subscription.



HOW LIKELY ARE YOU TO SWITCH YOUR NETFLIX SUBSCRIPTION TO STANDARD WITH ADS FOR \$6.99 PER MONTH IN THE NEXT MONTH?

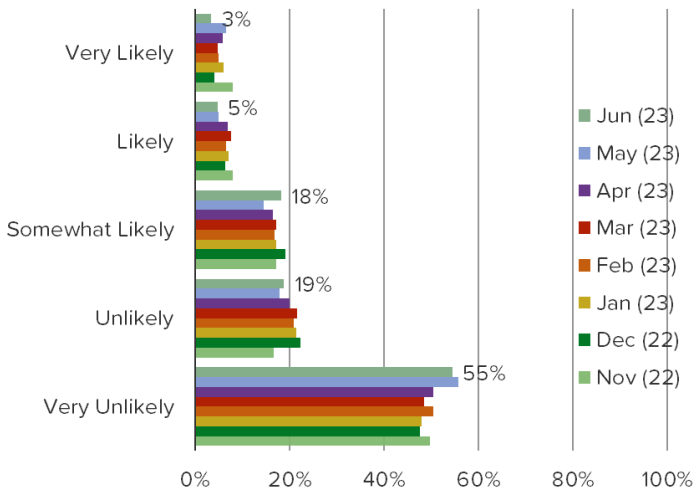
Posed to all respondents who are Netflix subscribers but are not on the ad supported plan.



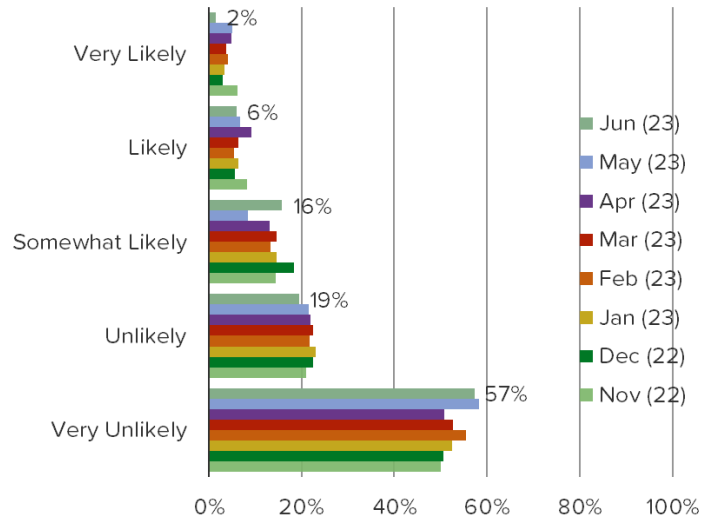
HOW LIKELY ARE YOU TO SIGN UP FOR THE FOLLOWING NETFLIX PLANS IN THE NEXT MONTH?

Posed to all respondents who are not currently Netflix subscribers.

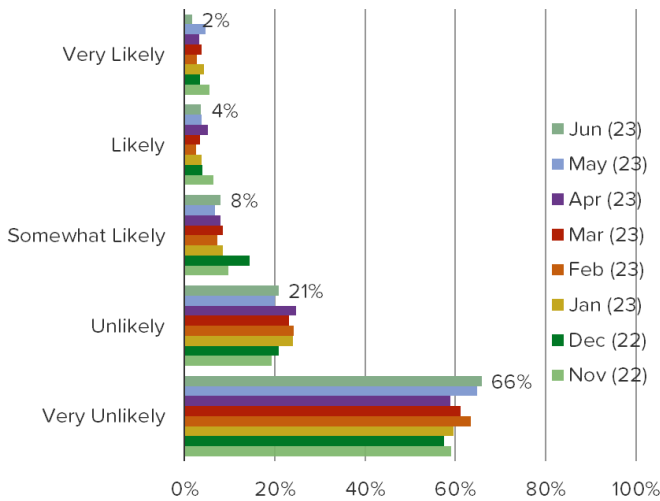
Standard with Ads



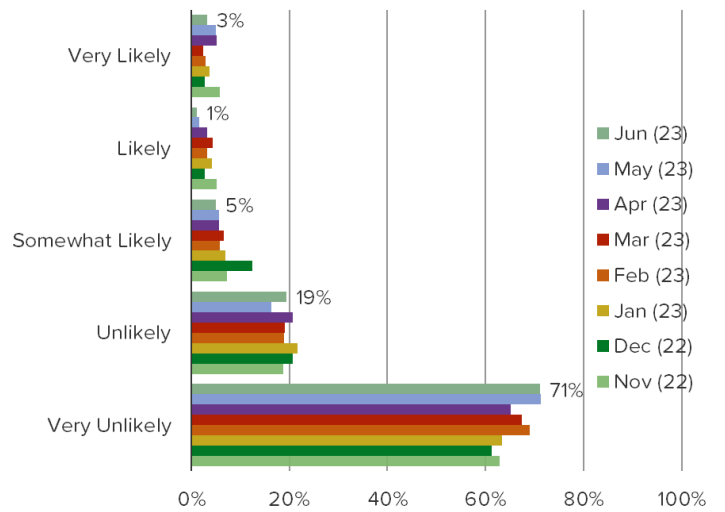
Basic



Standard



Premium



QUALITATIVE COLOR – NETFLIX BASIC WITH ADS

Respondents who do not watch Netflix at home currently

Why they WOULD NOT Sign up

- They don't like Netflix or don't watch it
- They don't have the money to pay for Netflix / don't want the added expense
- They think ads are annoying
- They think Netflix raises prices too often

Why they WOULD Sign up

- Better price
- Much better value

Respondents who currently pay for Netflix

Why they WOULD NOT switch to Basic with Ads

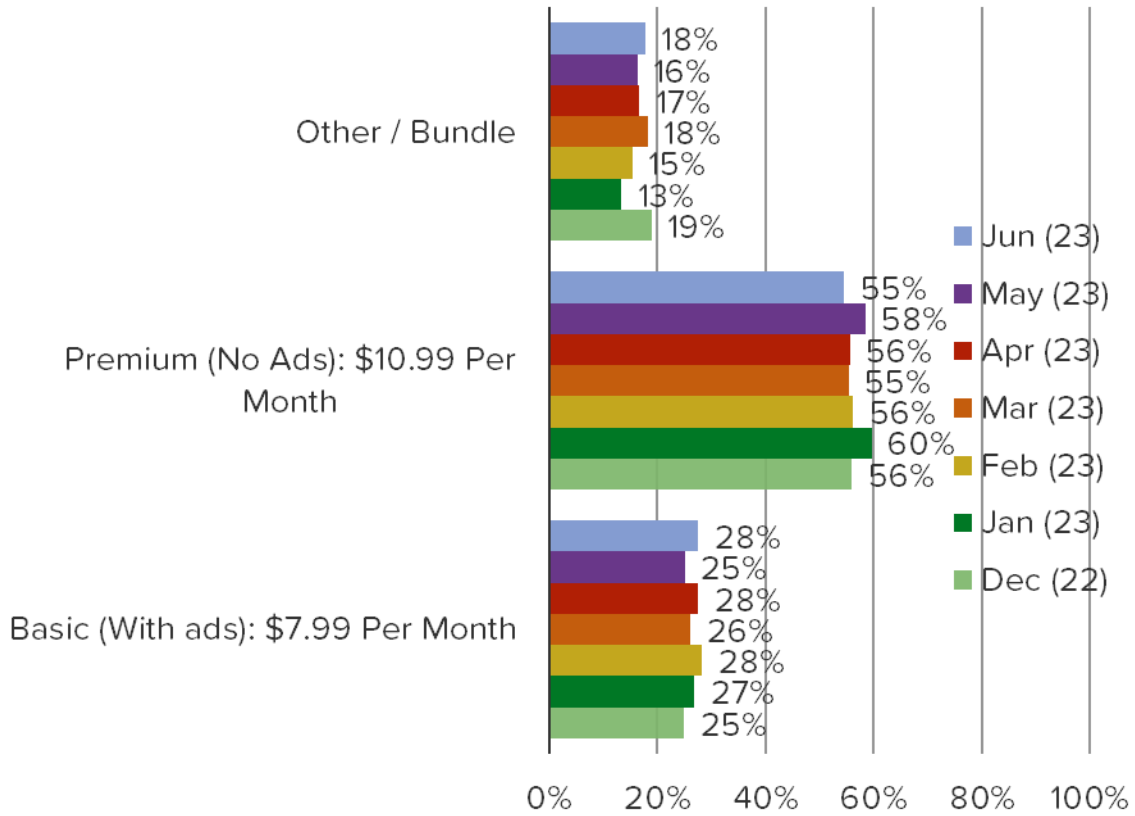
- They don't like ads
- They are content with what they have now
- Netflix is their main streaming service / they watch Netflix so much that they don't watch ads.

Why they WOULD switch to Basic with Ads

- It would be cheaper
- Money is tight right now

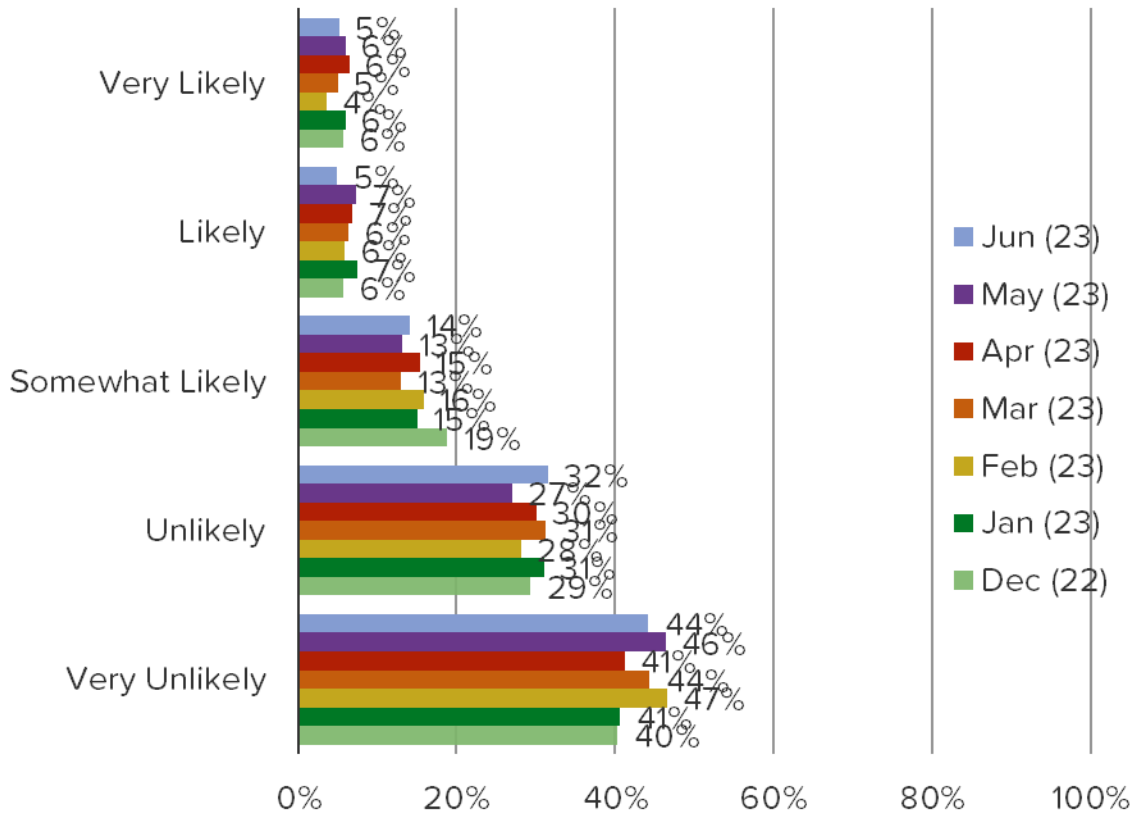
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR DISNEY+ SUBSCRIPTION?

Posed to all respondents who are Disney+ subscribers.



HOW LIKELY ARE YOU TO SWITCH YOUR DISNEY+ SUBSCRIPTION TO BASIC WITH ADS FOR \$7.99 PER MONTH IN THE NEXT MONTH?

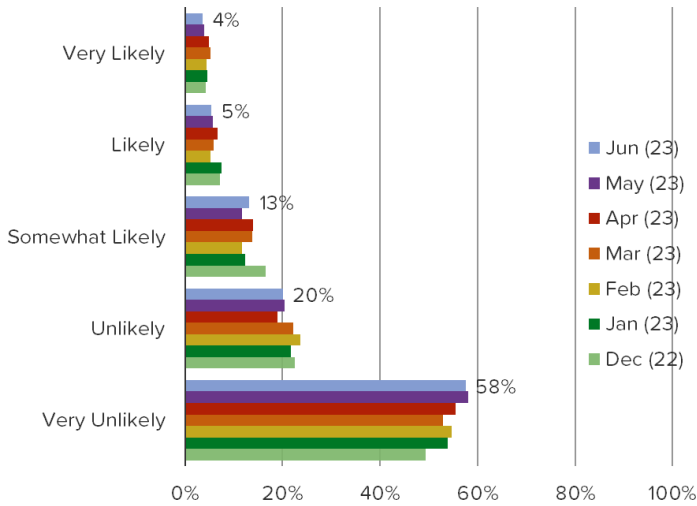
Posed to all respondents who are Disney+ subscribers but are not on the ad supported plan currently.



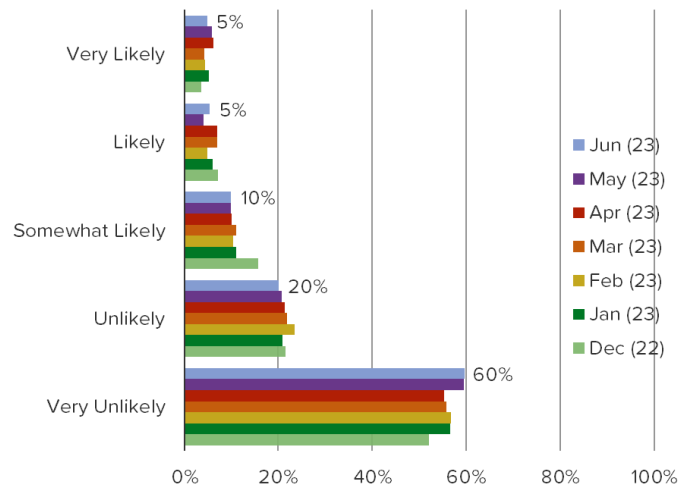
HOW LIKELY ARE YOU TO SIGN UP FOR THE FOLLOWING DISNEY+ PLANS IN THE NEXT MONTH?

Posed to respondents who are not currently Disney+ subscribers.

Basic (With ads): \$7.99 Per Month

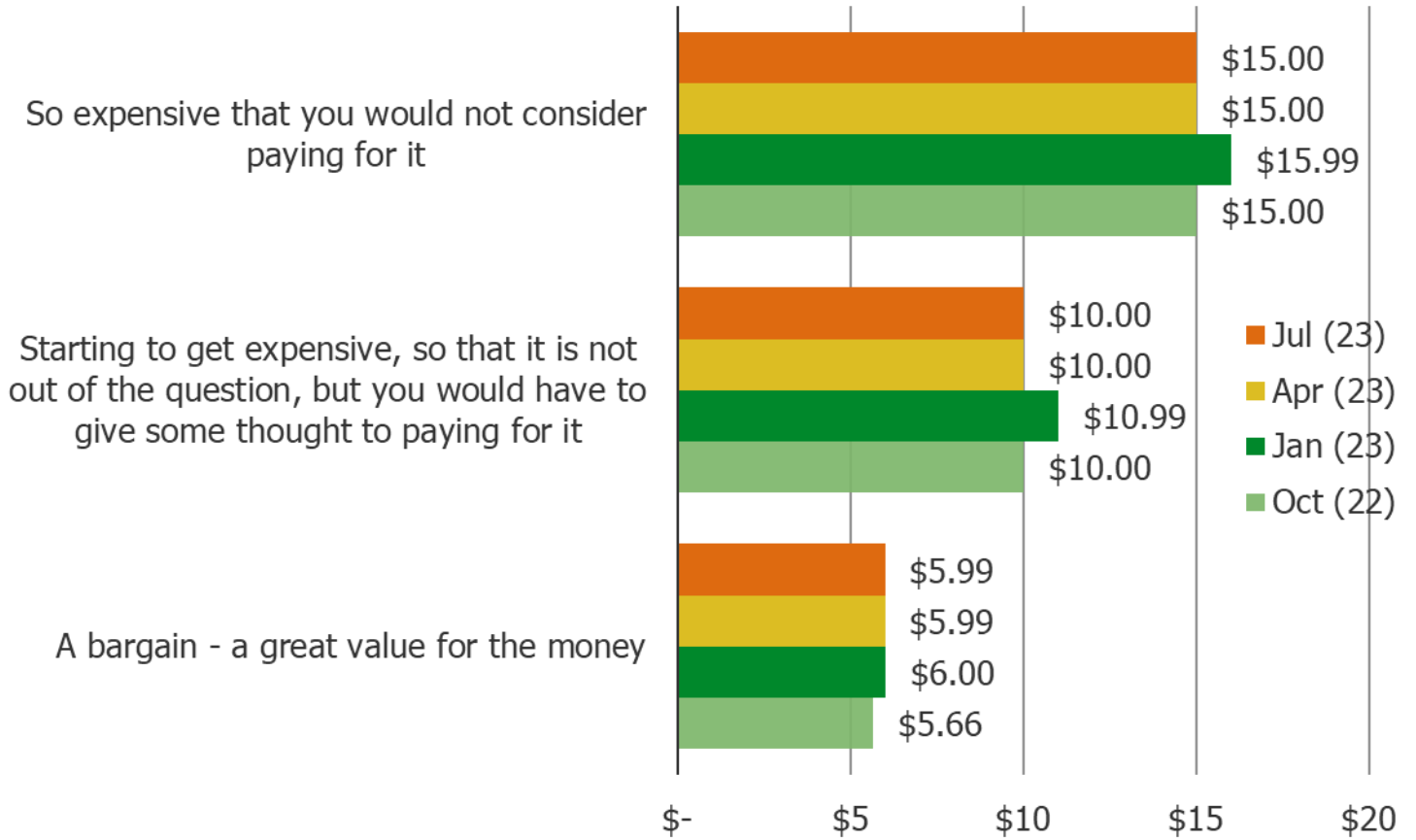


Premium (No Ads): \$10.99 Per Month



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

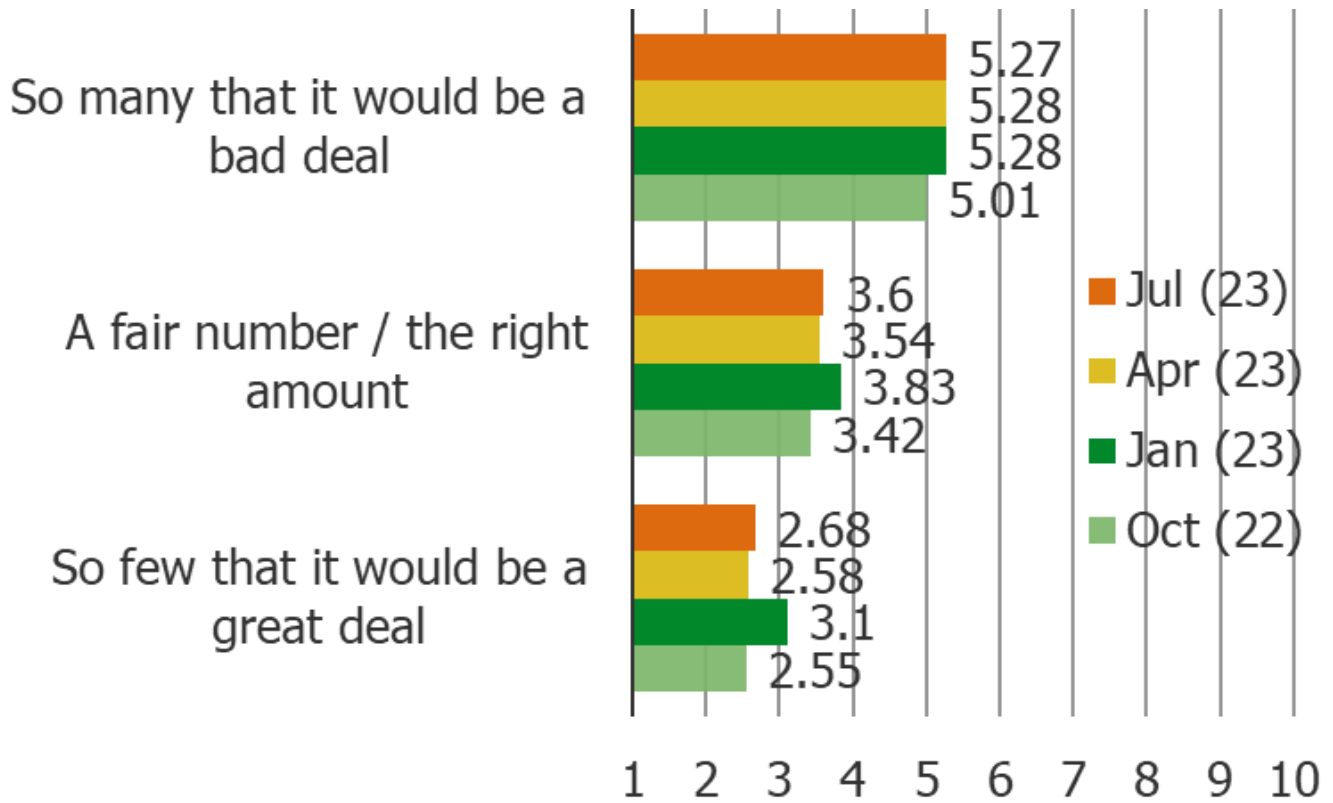
Posed to respondents who watch movies and/or TV shows at home (N = 846)



*Median

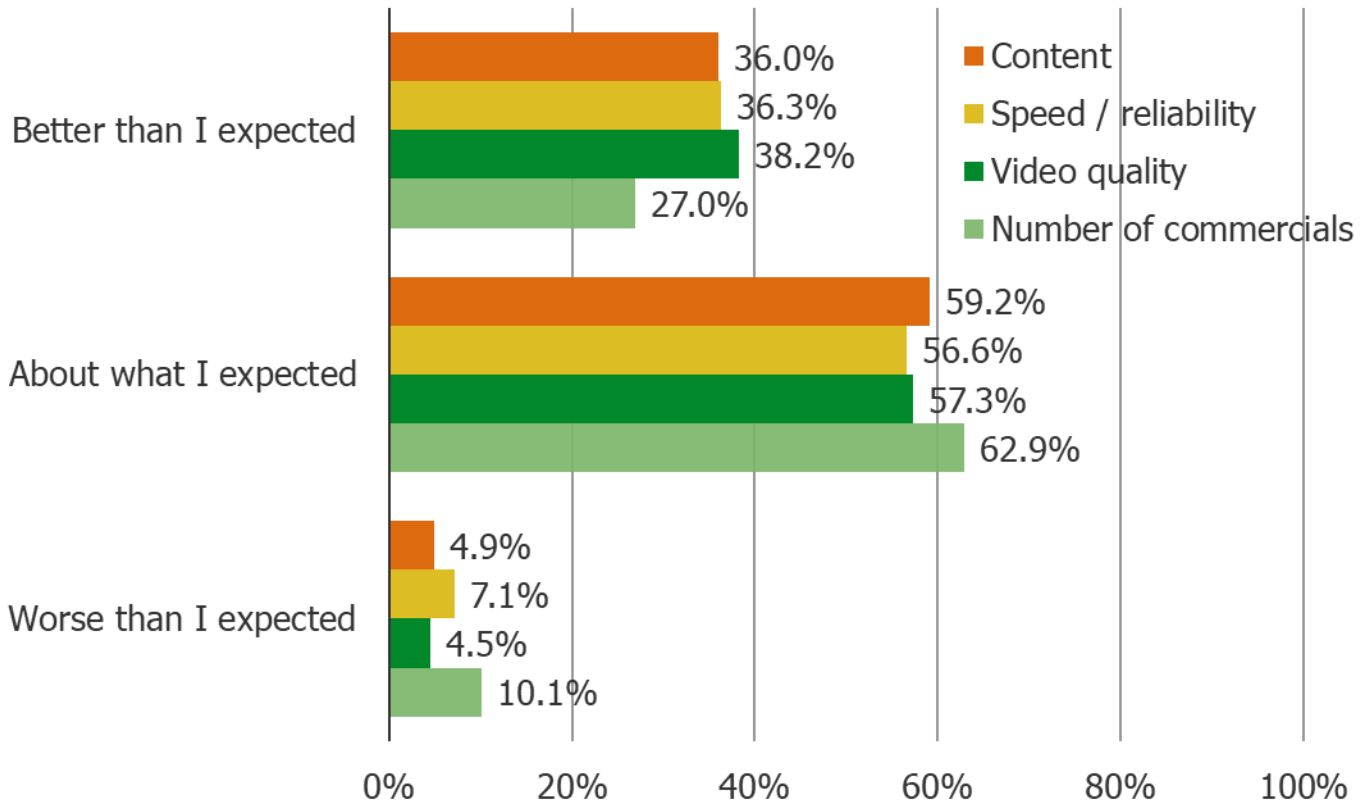
THINKING ABOUT NETFLIX'S AD-SUPPORTED TIER, HOW MANY COMMERCIALS PER HOUR WOULD YOU CONSIDER TO BE...

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 267



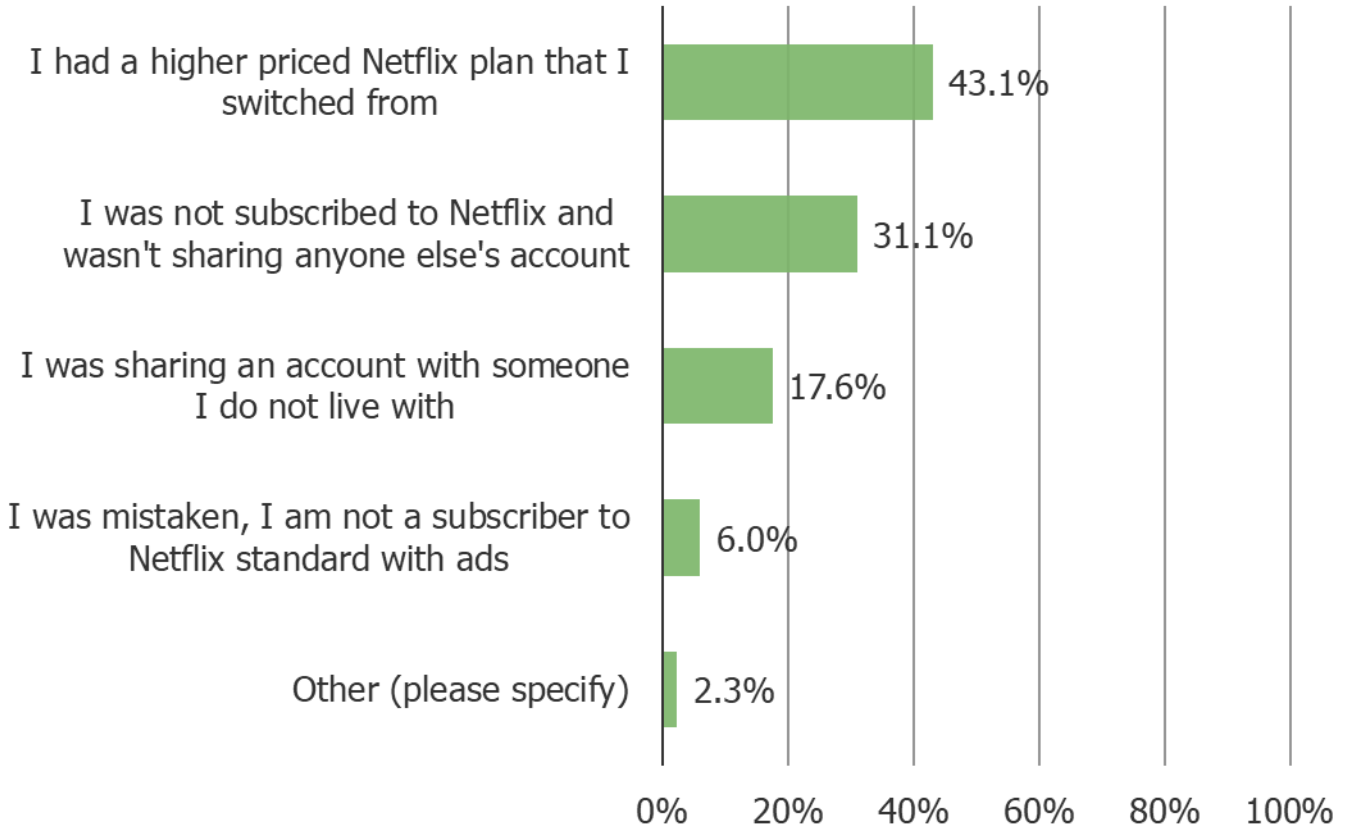
HOW DOES YOUR EXPERIENCE WITH THE STANDARD WITH ADS PLAN COMPARE TO YOUR EXPECTATIONS WHEN IT COMES TO THE FOLLOWING...

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 267



BEFORE YOU SIGNED UP FOR NETFLIX STANDARD WITH ADS, WHICH OF THE FOLLOWING BEST DESCRIBES YOU?

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 267

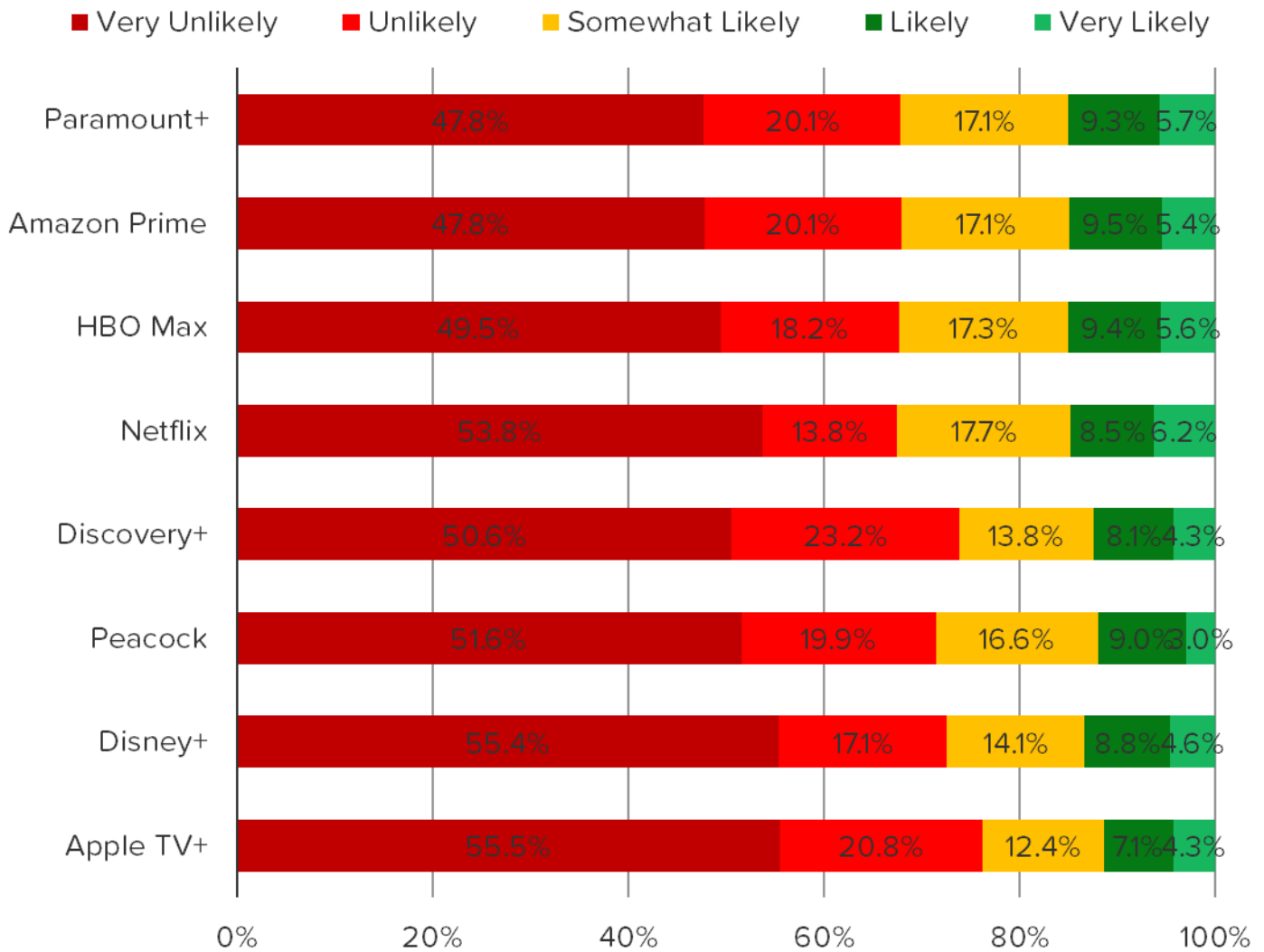


AD-SUPPORTED TIERS

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.

JULY 2023

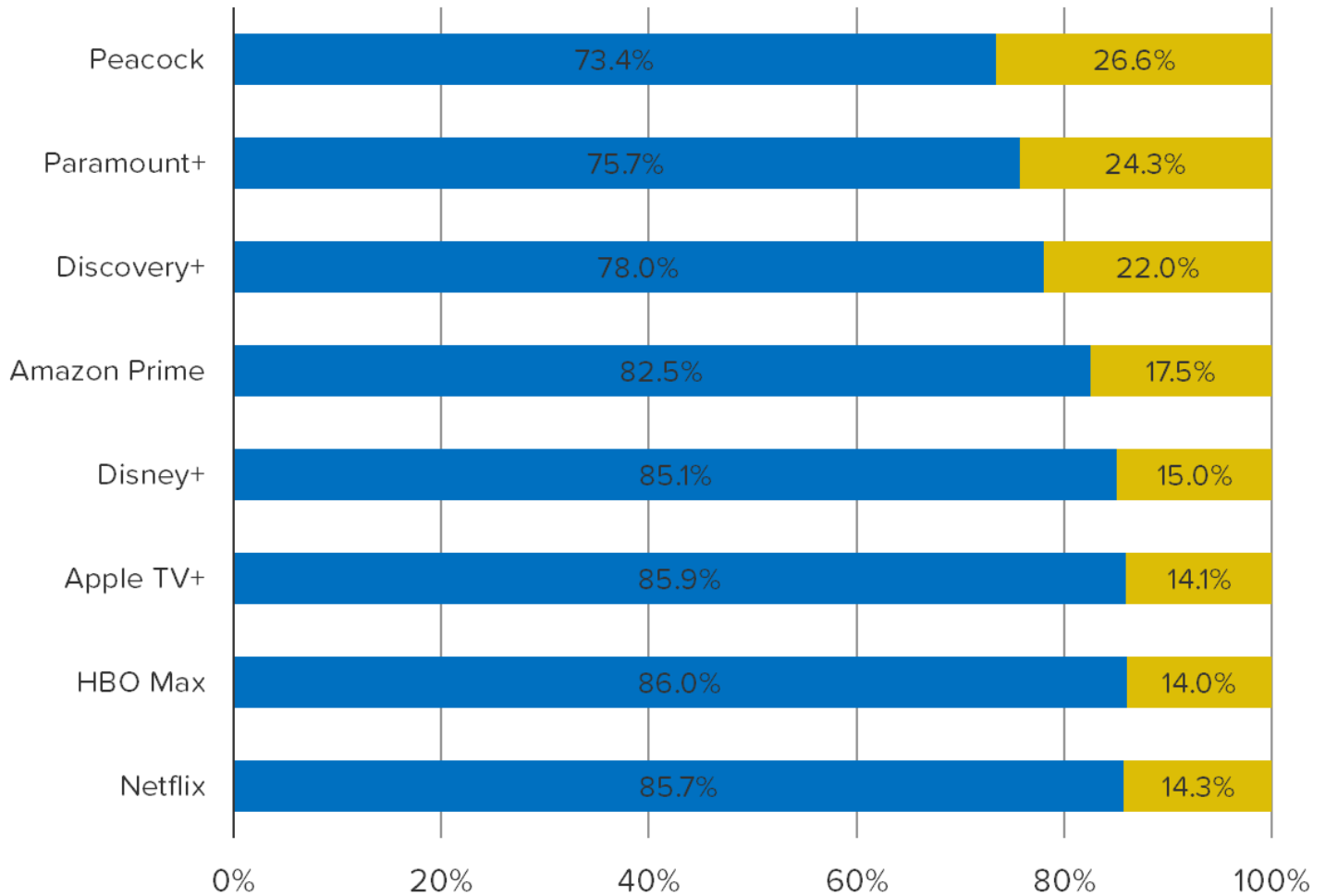


IF THE FOLLOWING OFFERED AN AD-SUPPORTED TIER, WITH COMMERCIALS, FOR A LOWER PRICE, WOULD YOU...

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

■ Keep my current account as is ■ Change to the tier with commercials at a lower price

July 2023

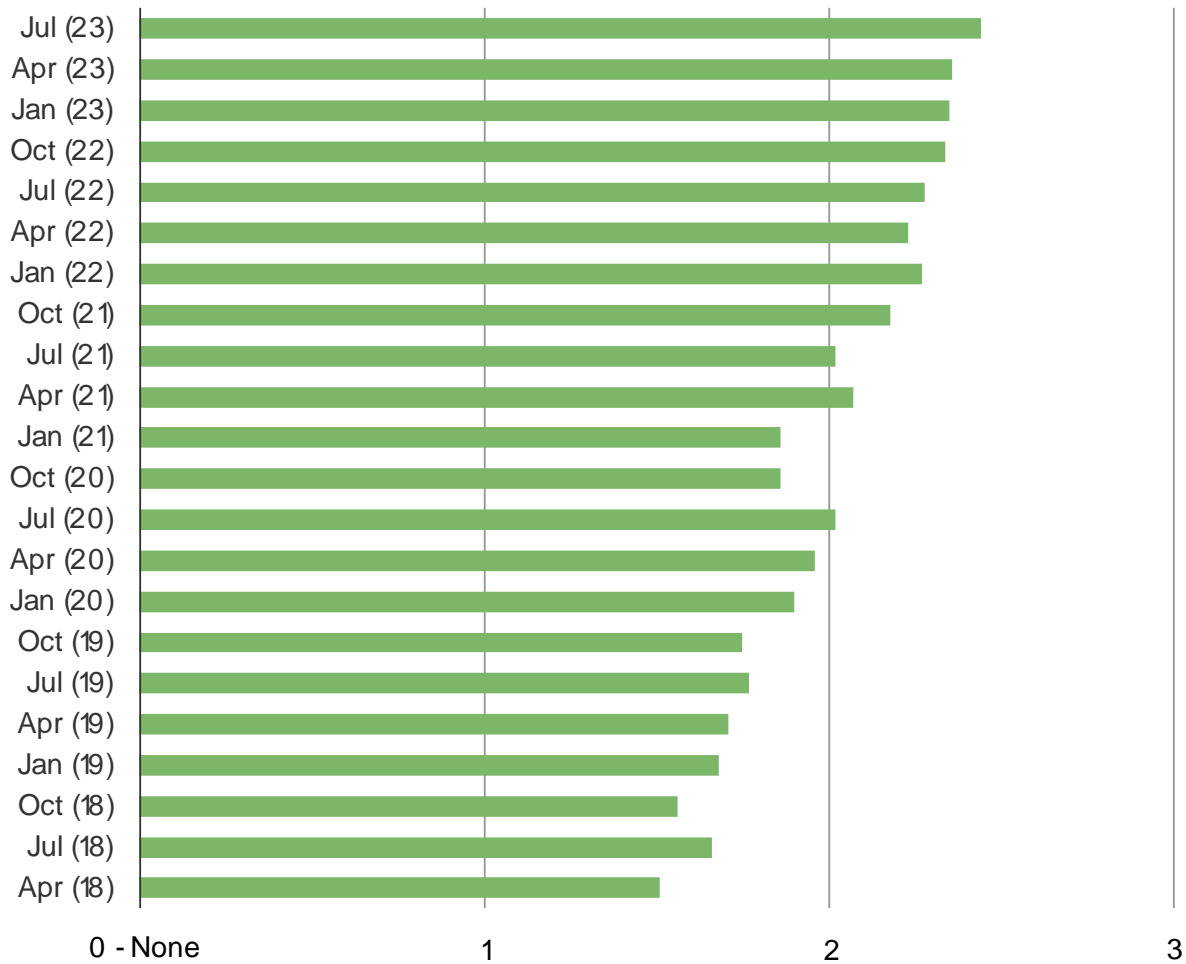


	N=
Netflix	385
HBO Max	186
Apple TV+	64
Disney+	214
Amazon Prime	377
Discovery+	59
Paramount+	173
Peacock	203

STREAMING SECTOR DYNAMICS

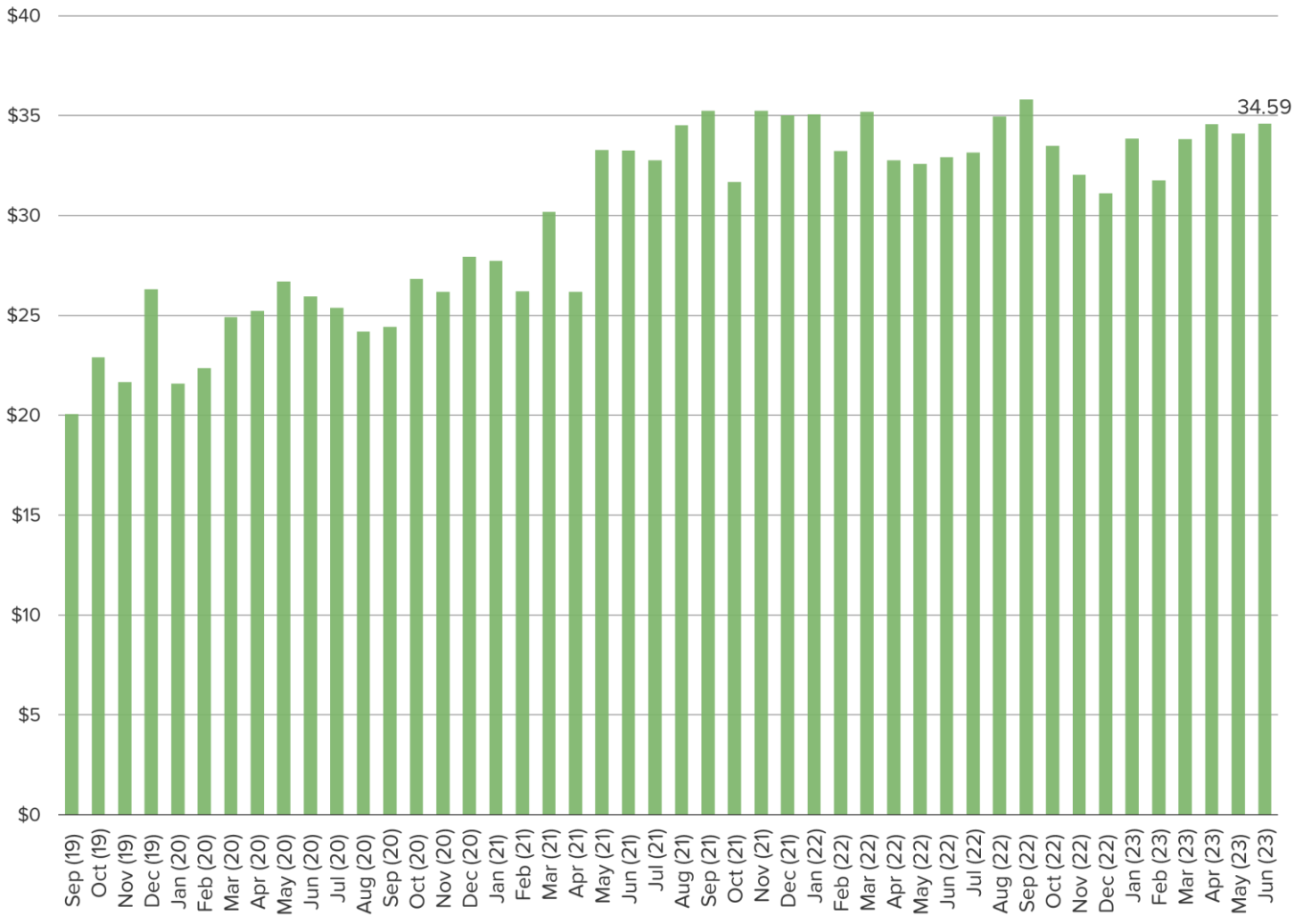
HOW MANY STREAMING VIDEO SERVICES DO YOU THINK IS THE RIGHT NUMBER TO BE PAYING FOR AT THE SAME TIME?

Posed to all respondents.



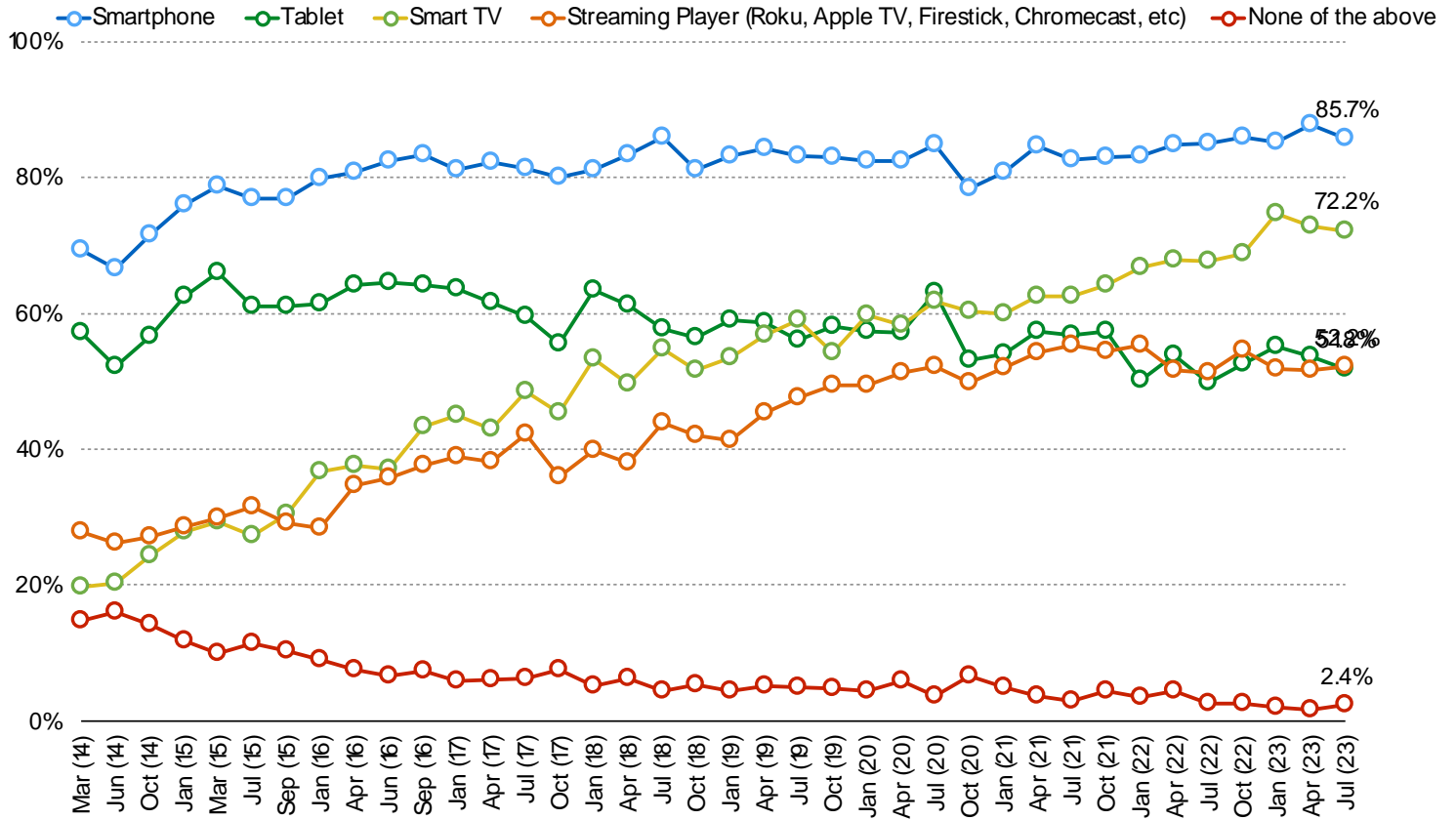
HOW MUCH DO YOU THINK IS APPROPRIATE TO SPEND ON STREAMING VIDEO SERVICES, IN TOTAL, PER MONTH?

Posed to all respondents.



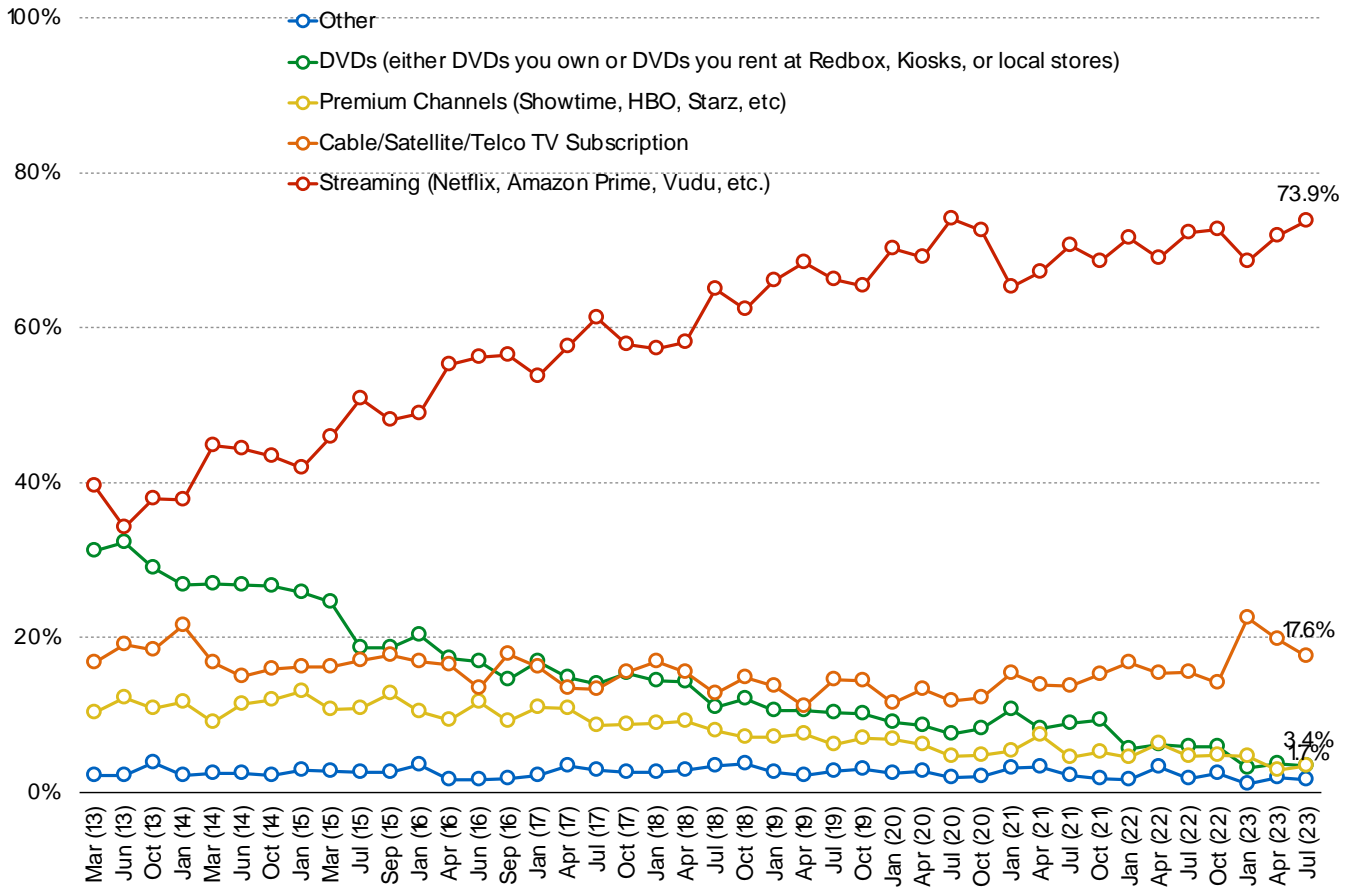
INTERNET CONNECTED DEVICES OWNED BY RESPONDENTS

This question was posed to the target audience.



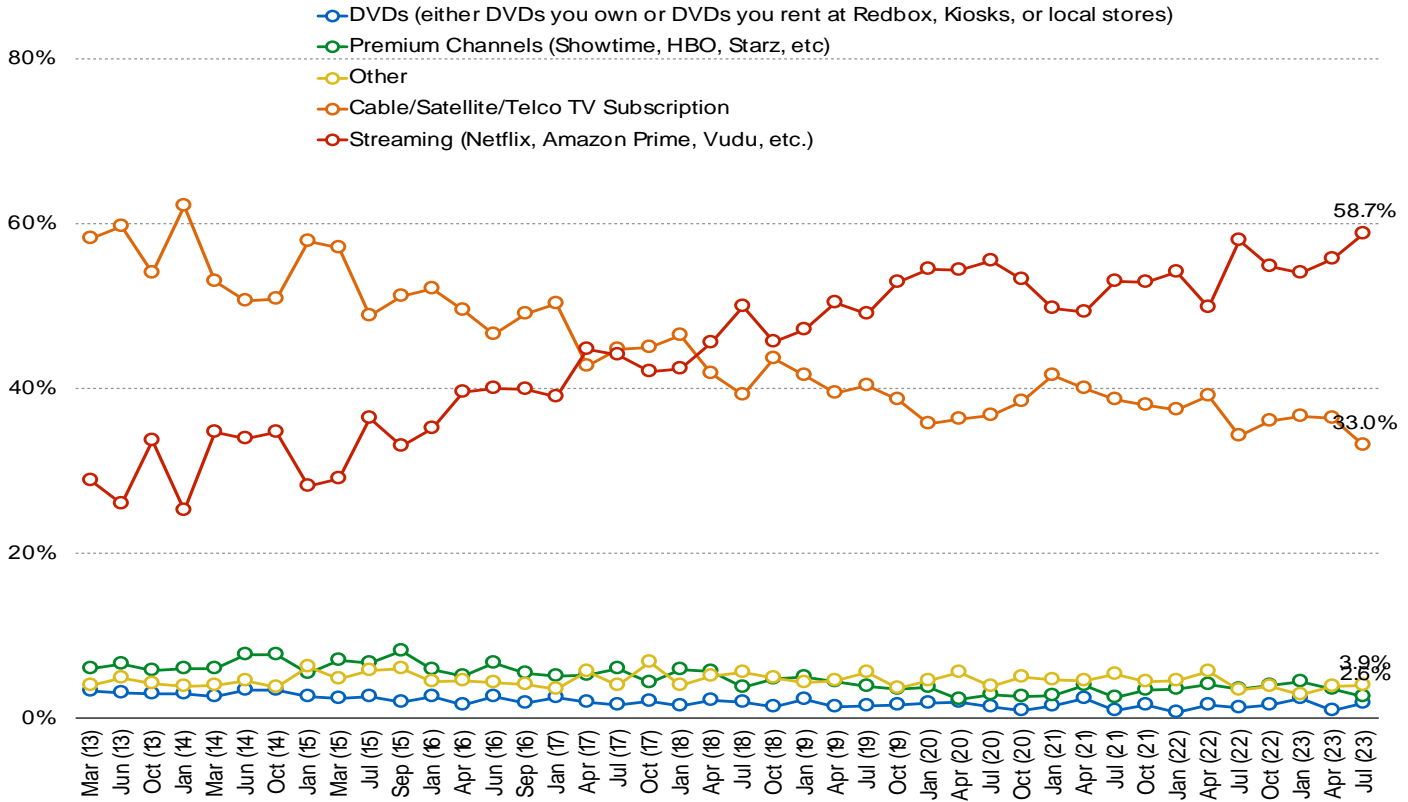
PREFERRED METHOD FOR WATCHING MOVIES

This question was posed to the target audience.



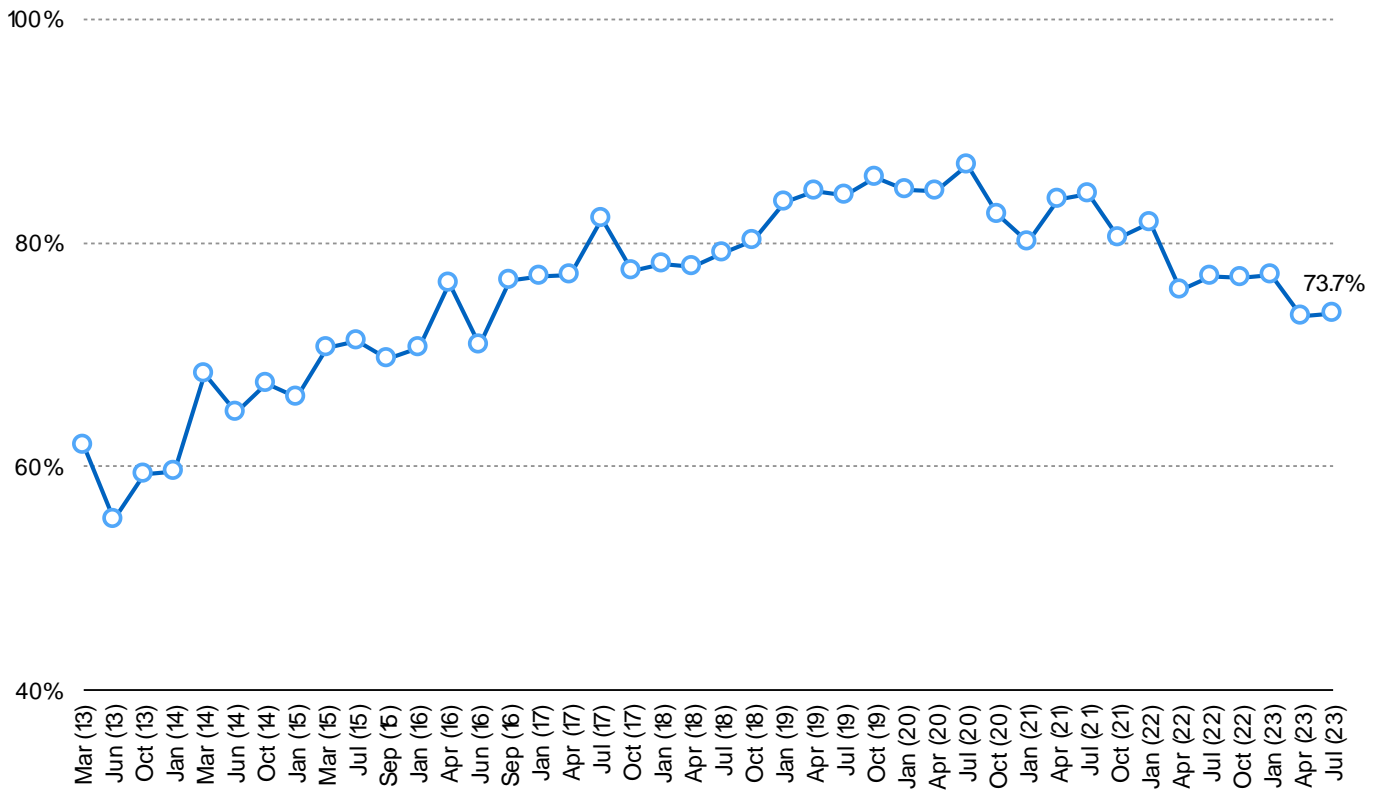
PREFERRED METHOD FOR WATCHING TELEVISION SHOWS

This question was posed to the target audience.



DO YOU SUBSCRIBE TO ANY STREAMING VIDEO SERVICES?

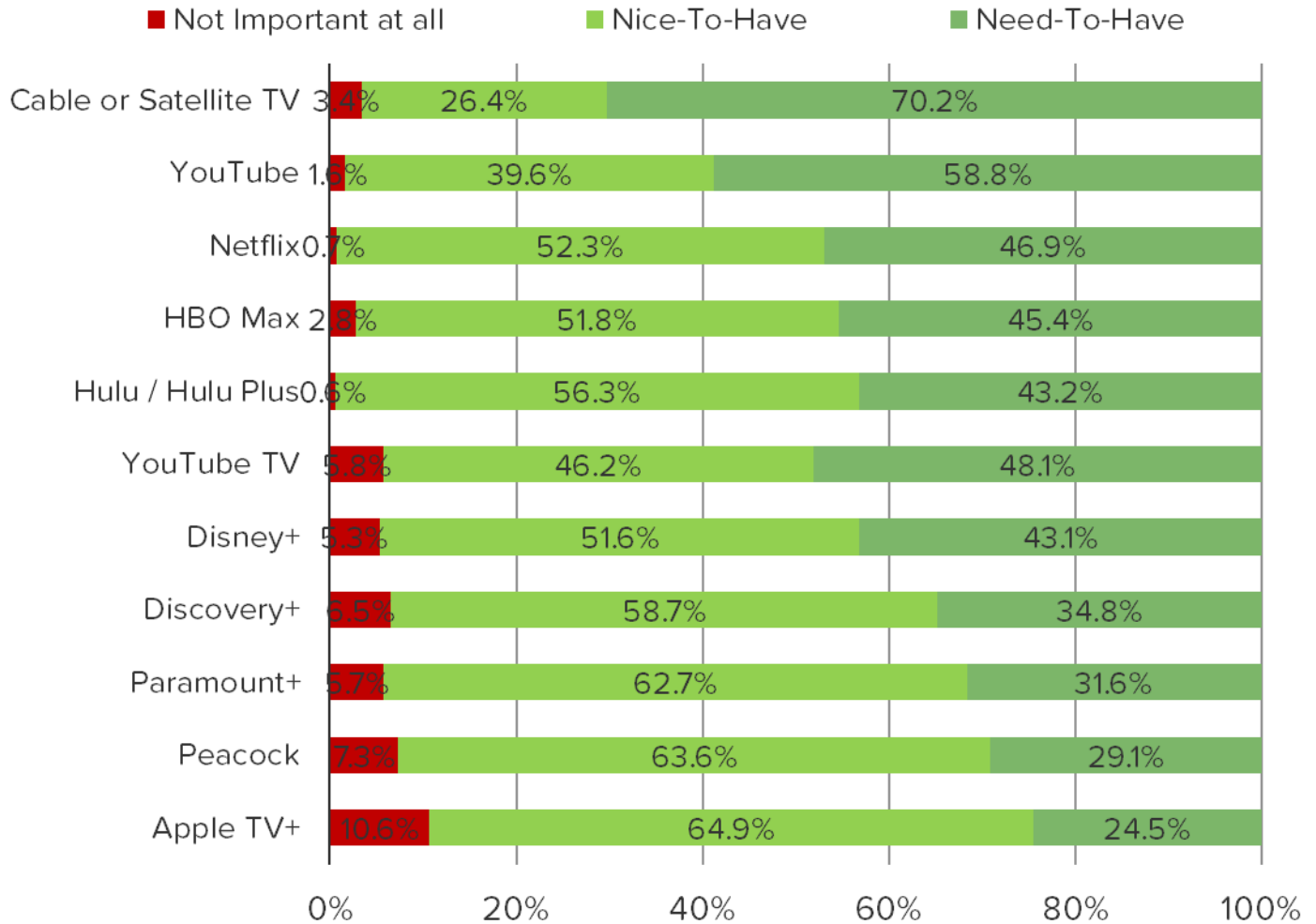
Posed to respondents who watch movies and TV shows at home.



STREAMING PLATFORMS – COMPETITIVE DYNAMICS

DO YOU CONSIDER THE FOLLOWING TO BE...

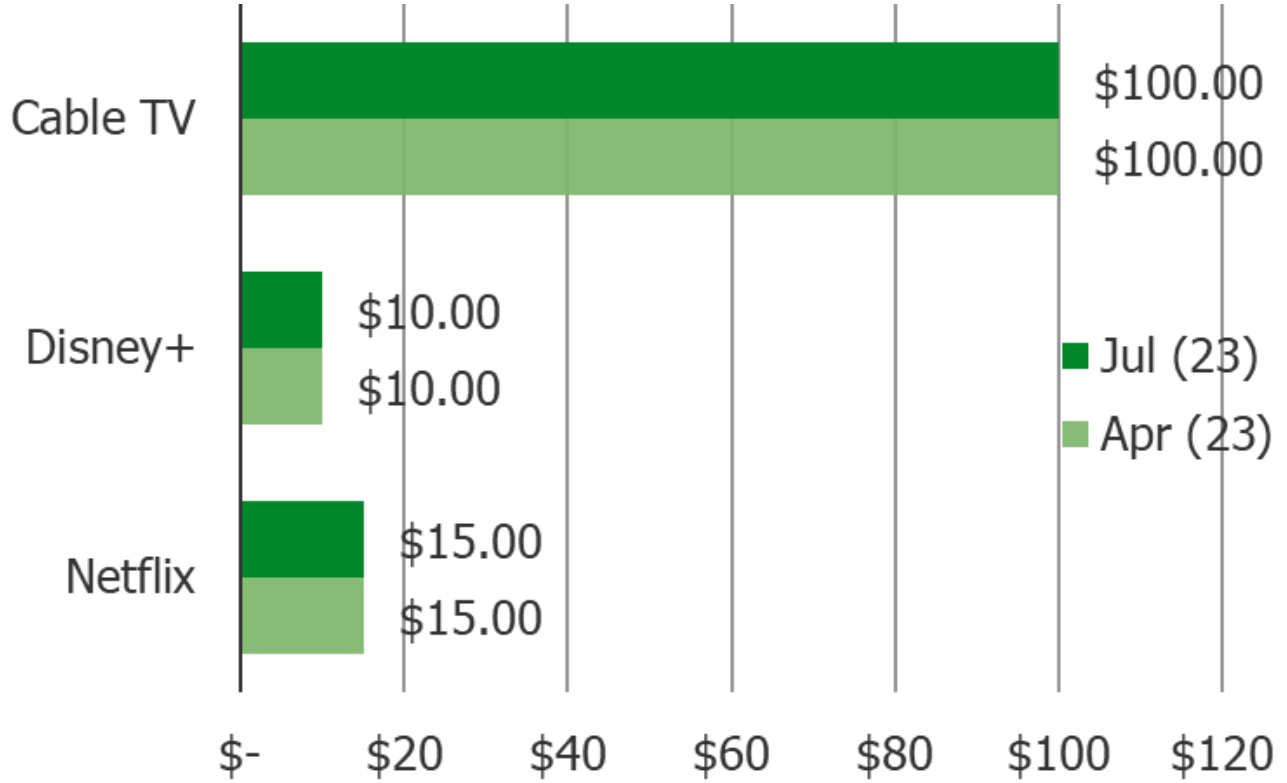
Posed to all respondents who use the below methods/services to watch movies/TV shows/video content at home.



	N=
Apple TV+	94
Peacock	275
Paramount+	244
Discovery+	92
Disney+	320
YouTube TV	104
Hulu / Hulu Plus	359
HBO Max	251
Netflix	537
YouTube	371
Cable or Satellite TV	292

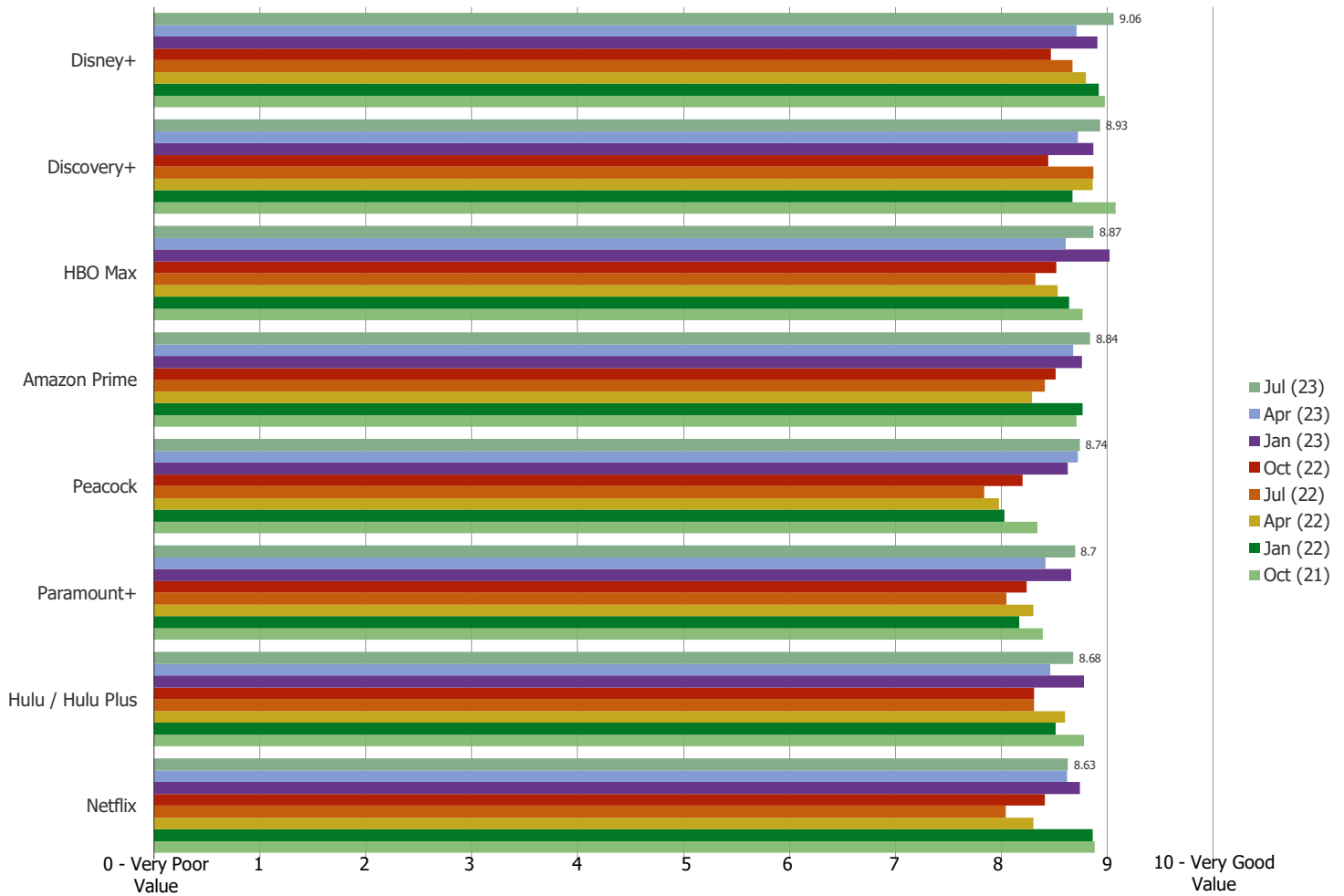
HOW MUCH DO YOU PAY PER MONTH FOR THIS SUBSCRIPTION?

Posed to respondents who pay for each of the following.



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

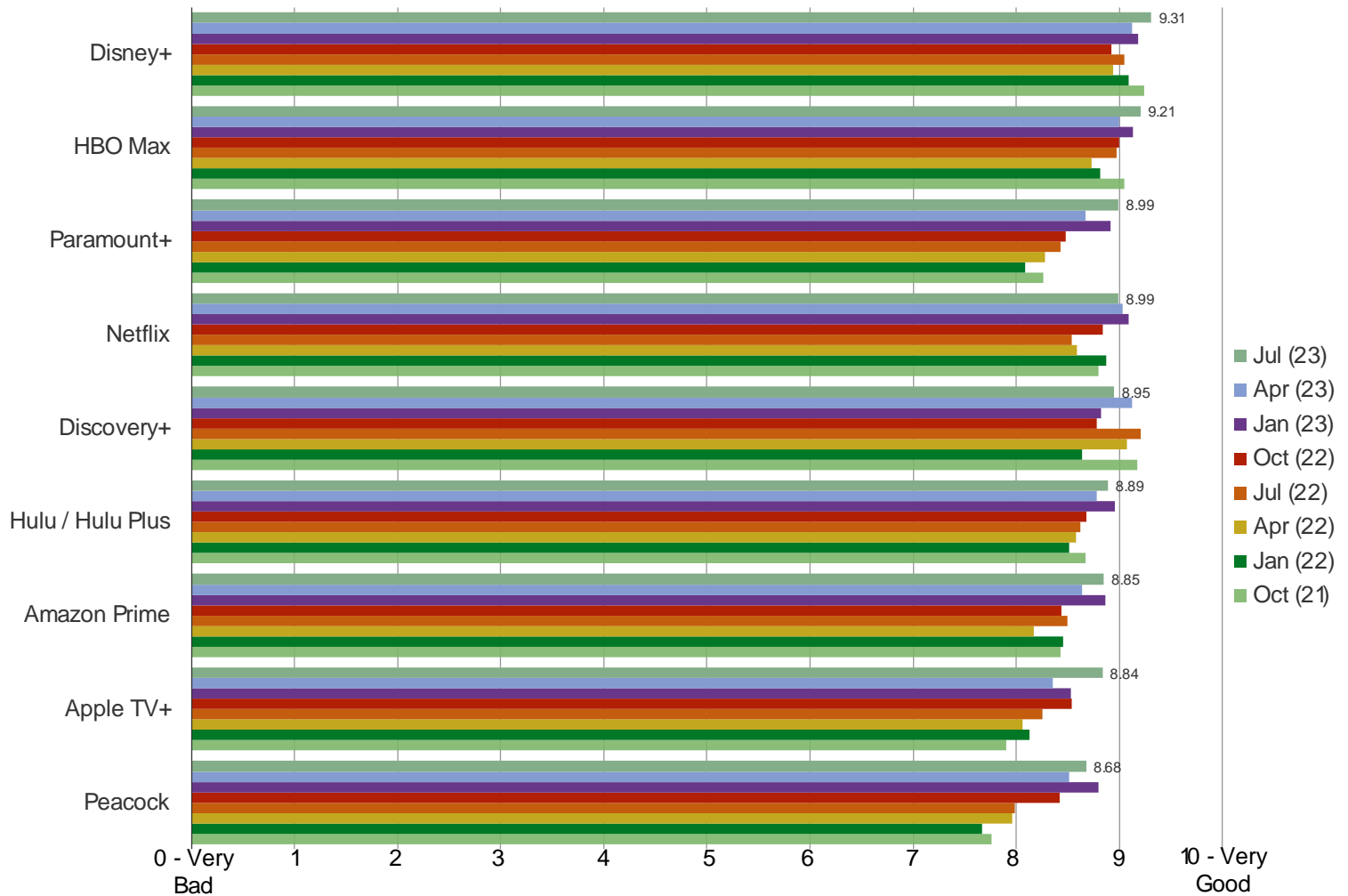
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



	N=
Cable or Satellite TV	289
Apple TV+	87
Netflix	497
Hulu / Hulu Plus	337
Paramount+	226
Peacock	261
Amazon Prime	457
HBO Max	230
Discovery+	84
Disney+	283

PLEASE RATE THE CONTENT AVAILABLE ON THE FOLLOWING:

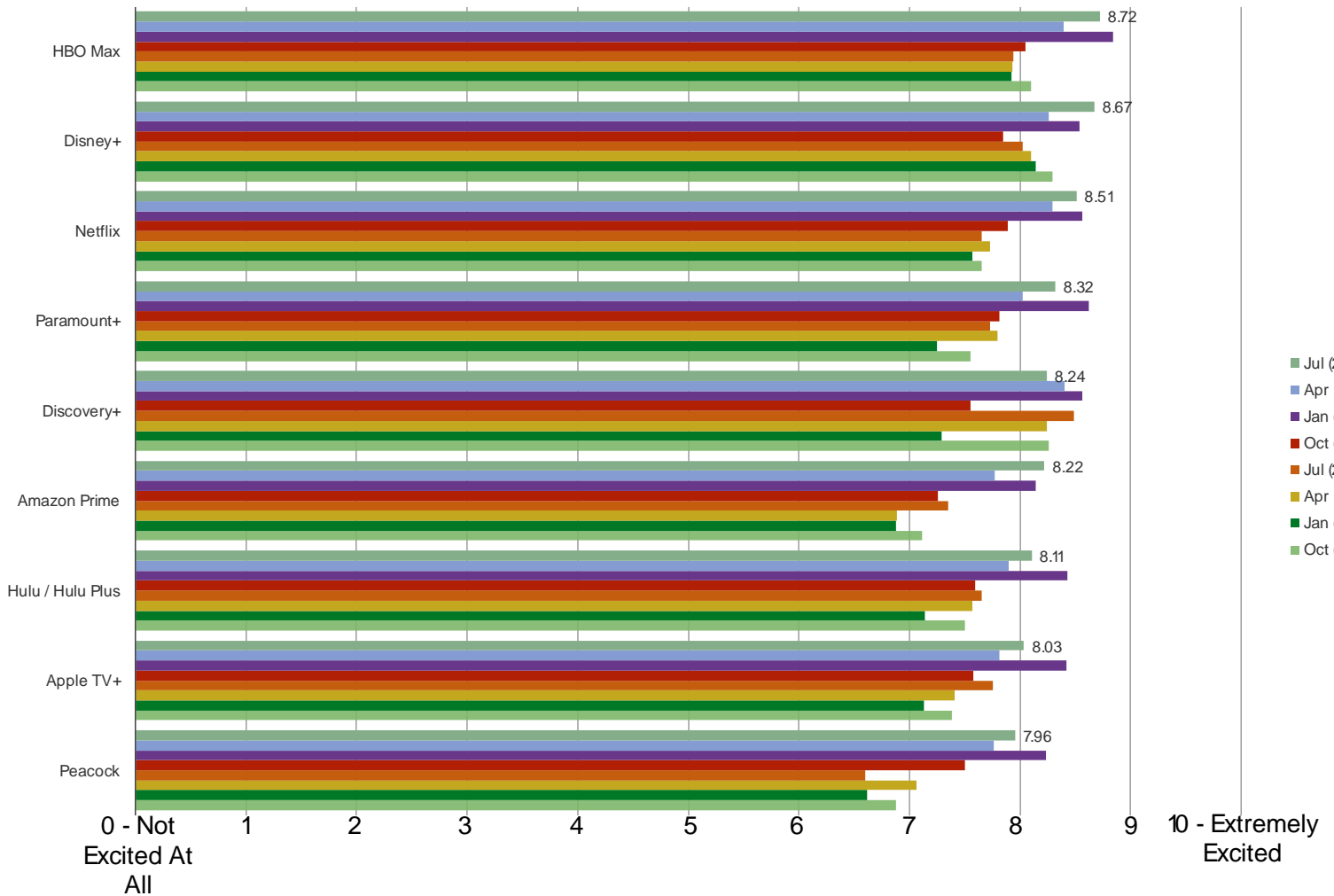
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



	N=
Cable or Satellite TV	289
Apple TV+	87
Netflix	497
Hulu / Hulu Plus	337
Paramount+	226
Peacock	261
Amazon Prime	457
HBO Max	230
Discovery+	84
Disney+	283

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.



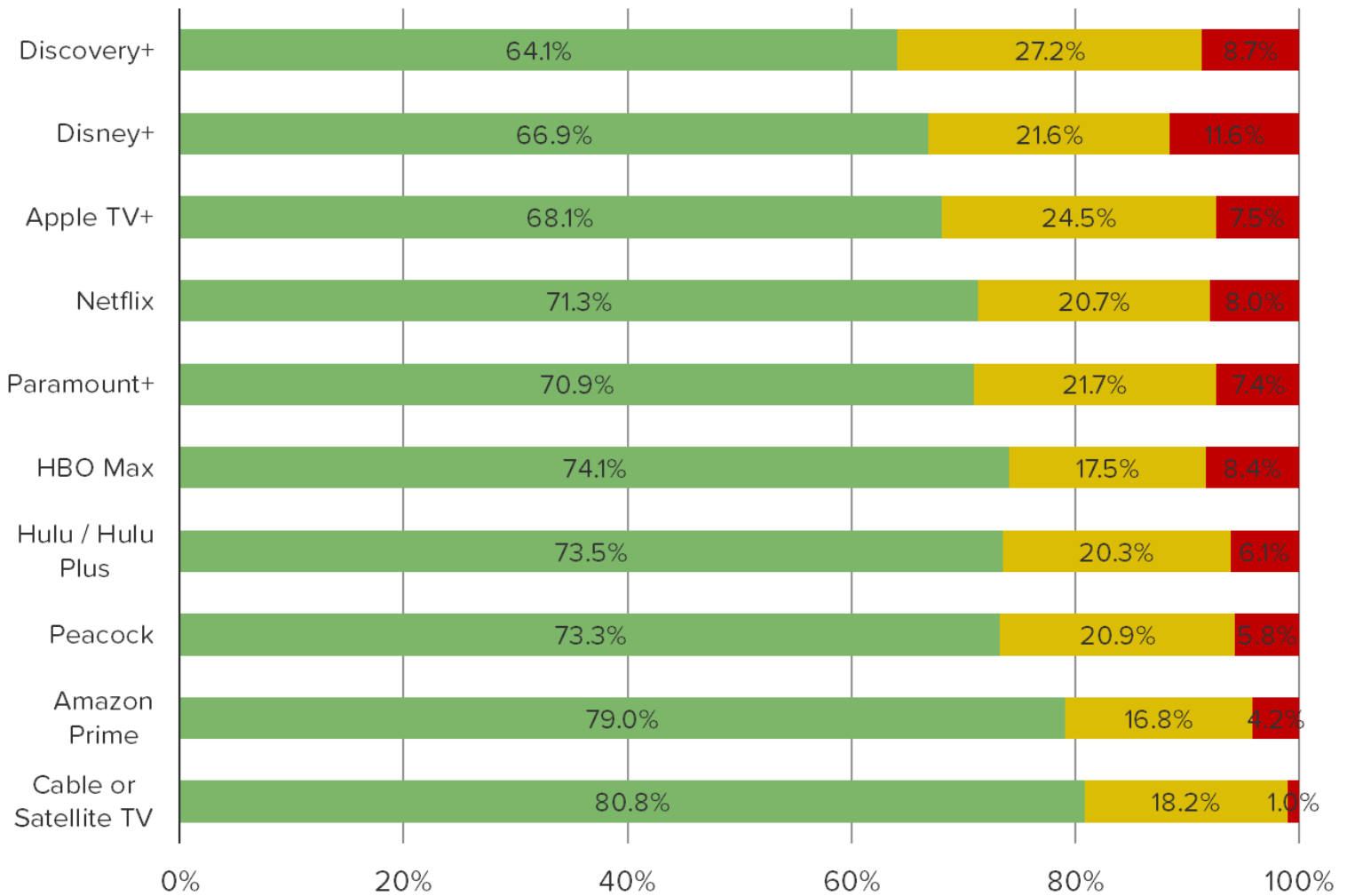
	N=
Cable or Satellite TV	289
Apple TV+	87
Netflix	497
Hulu / Hulu Plus	337
Paramount+	226
Peacock	261
Amazon Prime	457
HBO Max	230
Discovery+	84
Disney+	283

WHICH OF THE FOLLOWING 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.

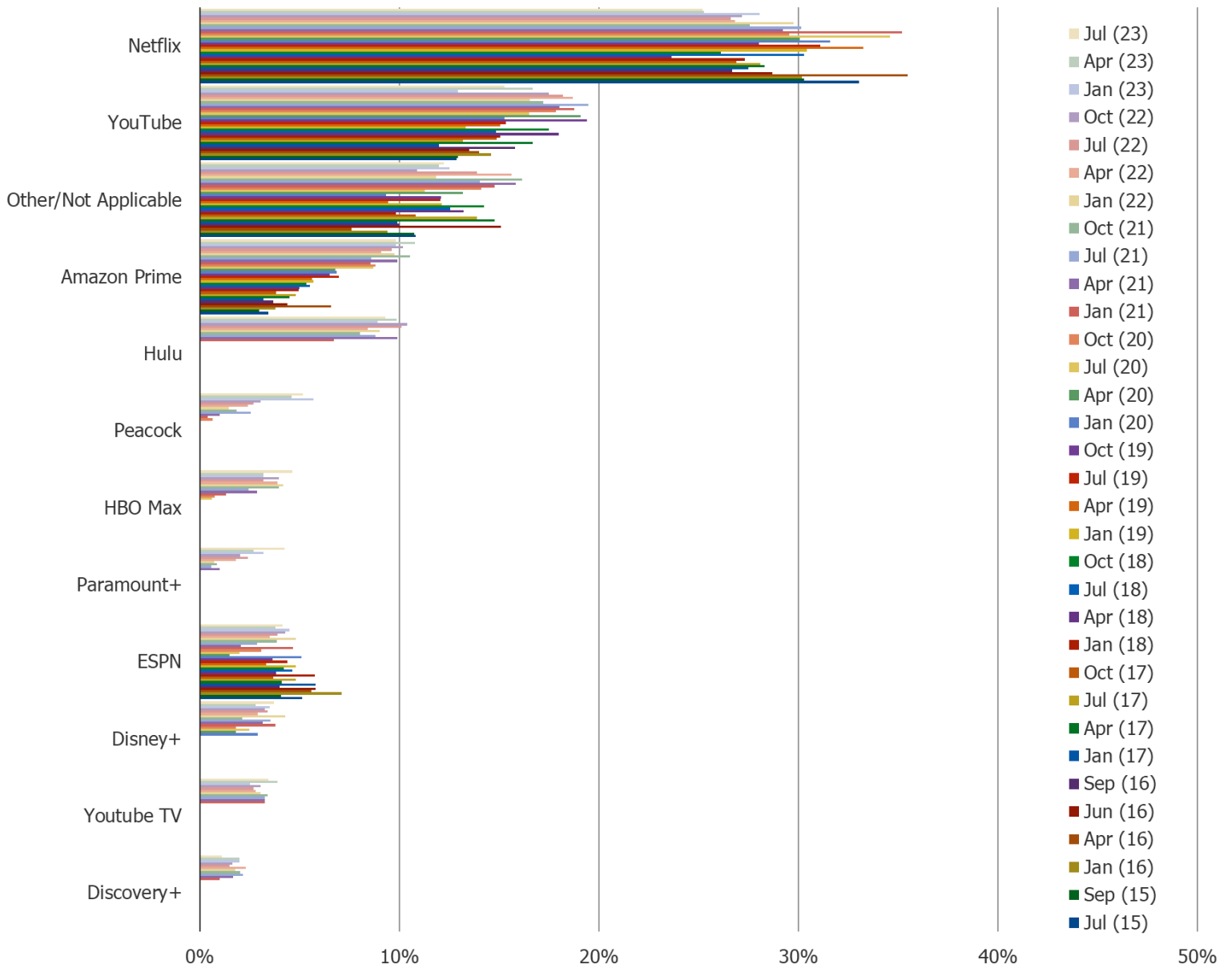
JULY 2023

- 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



OUT OF THE FOLLOWING NETWORKS/SERVICES, WHICH DO YOU WATCH MOST OFTEN?

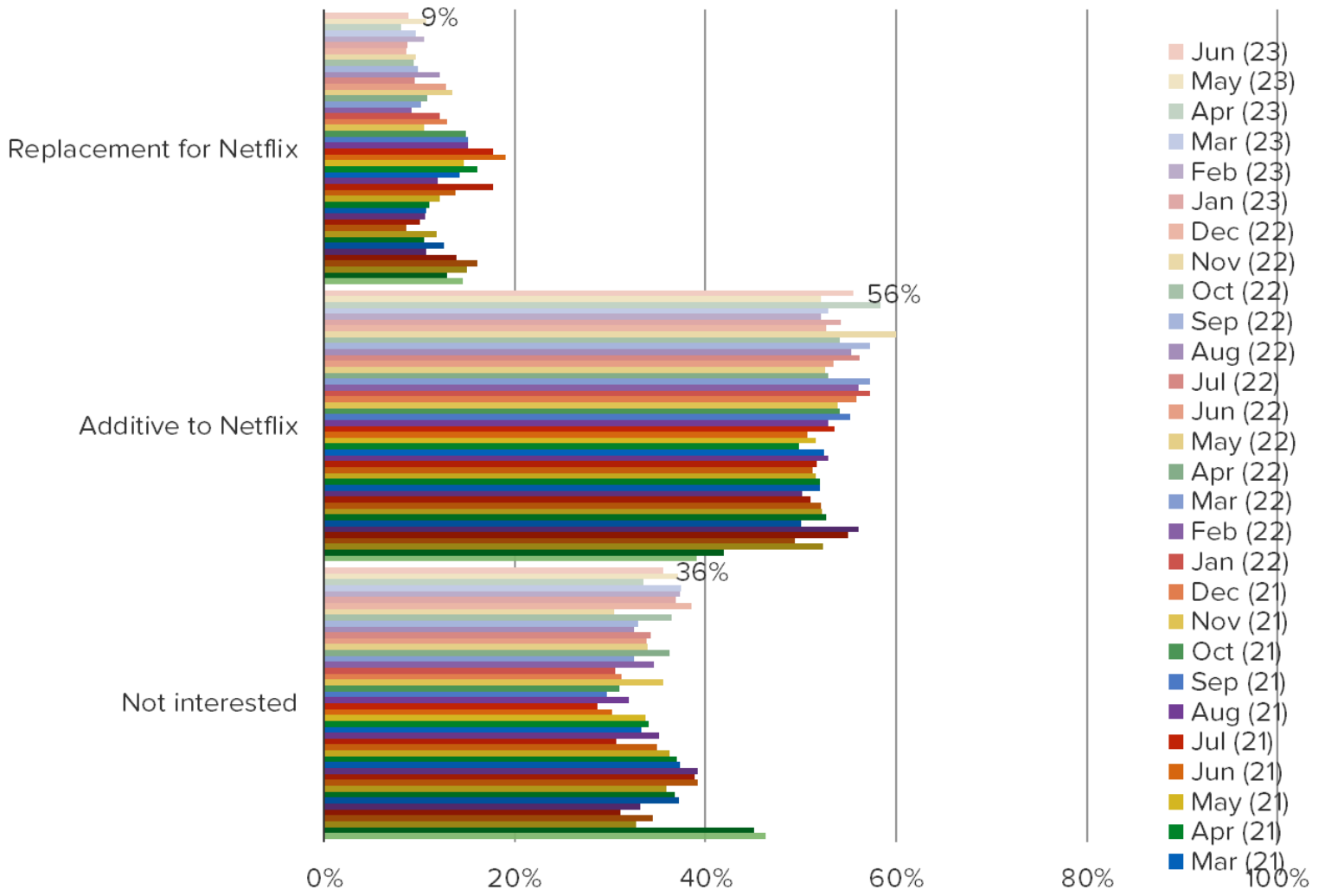
Posed to all respondents



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

Posed to Netflix subscribers.

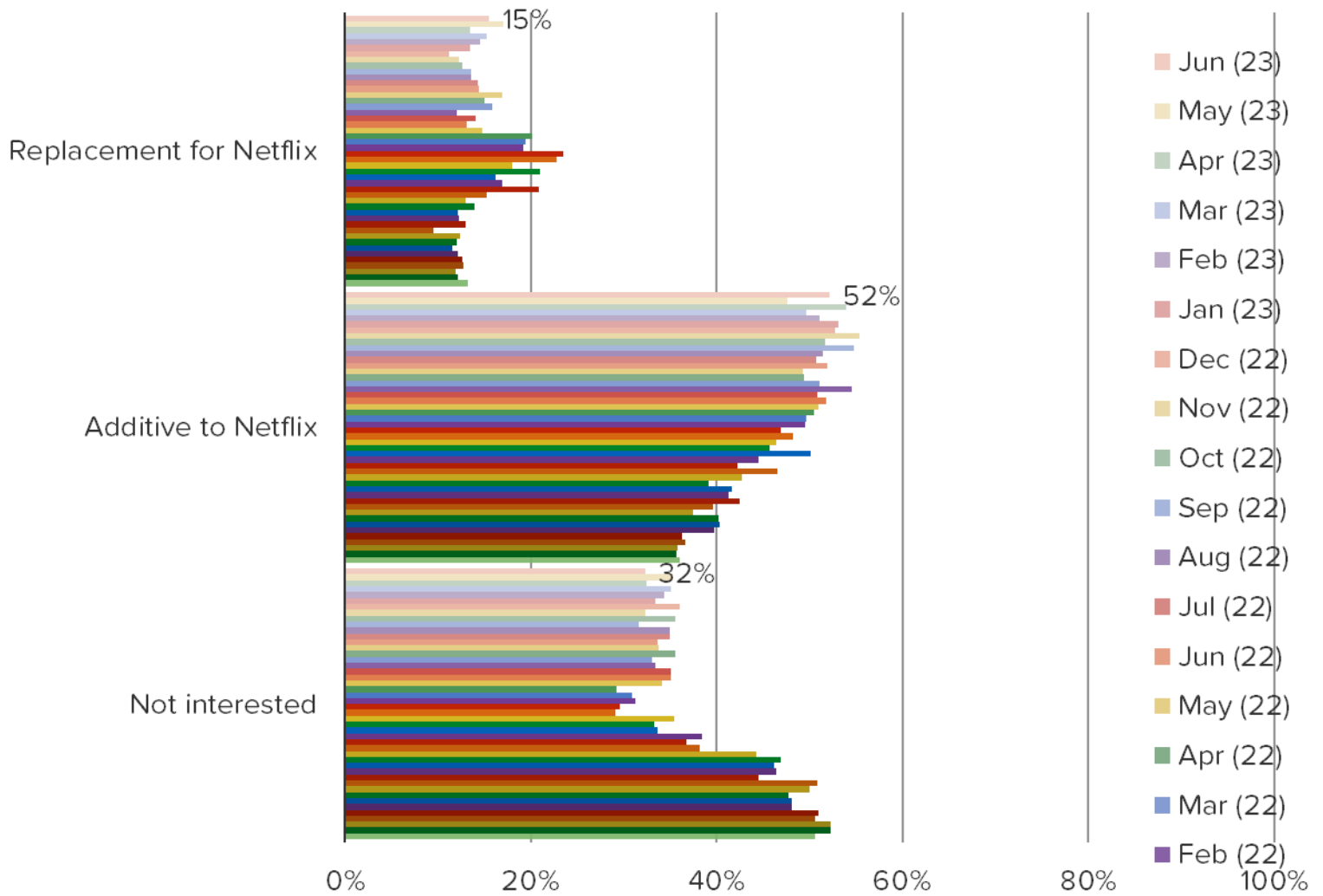
Disney+



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

Posed to Netflix subscribers.

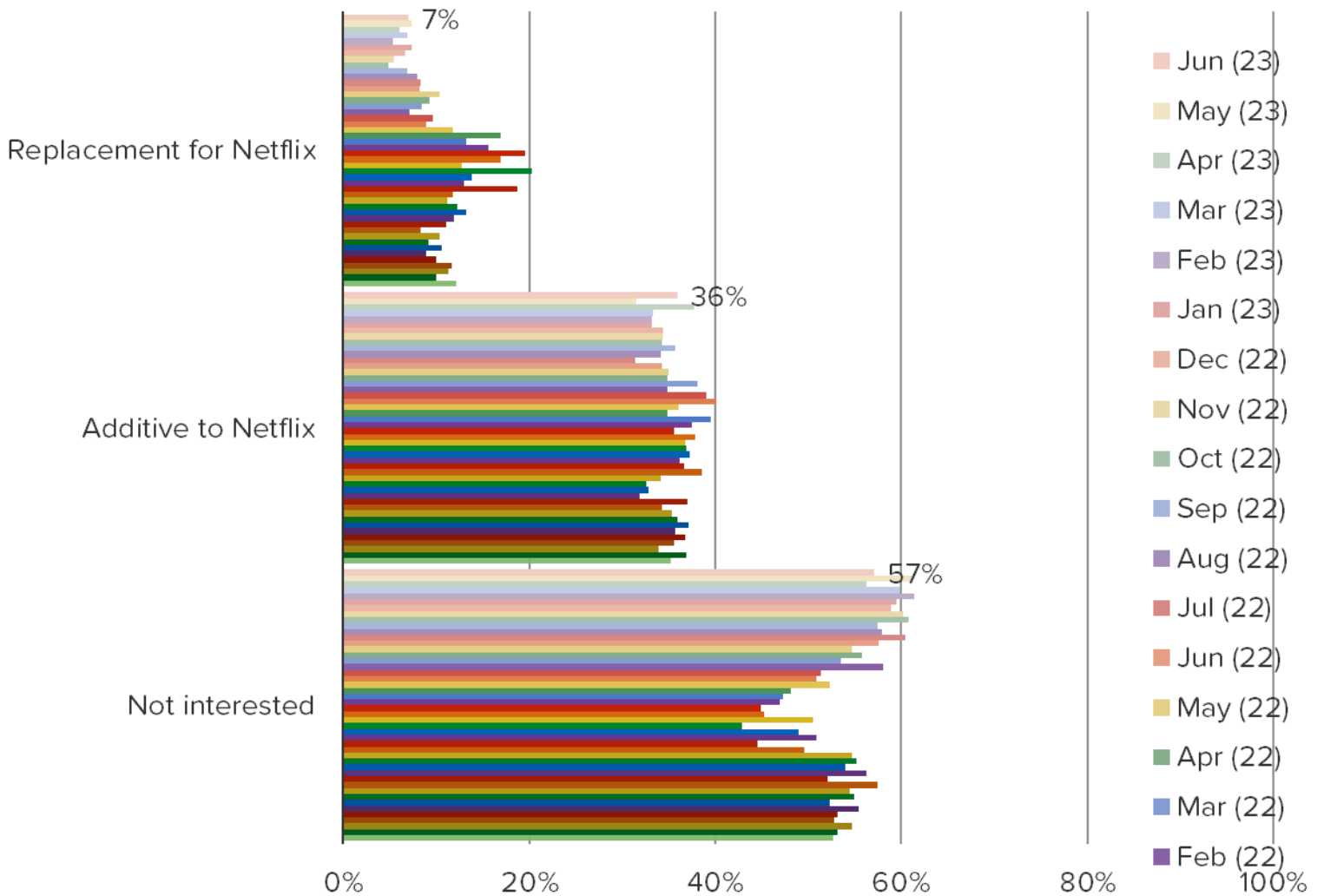
HBO Max



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

Posed to Netflix subscribers.

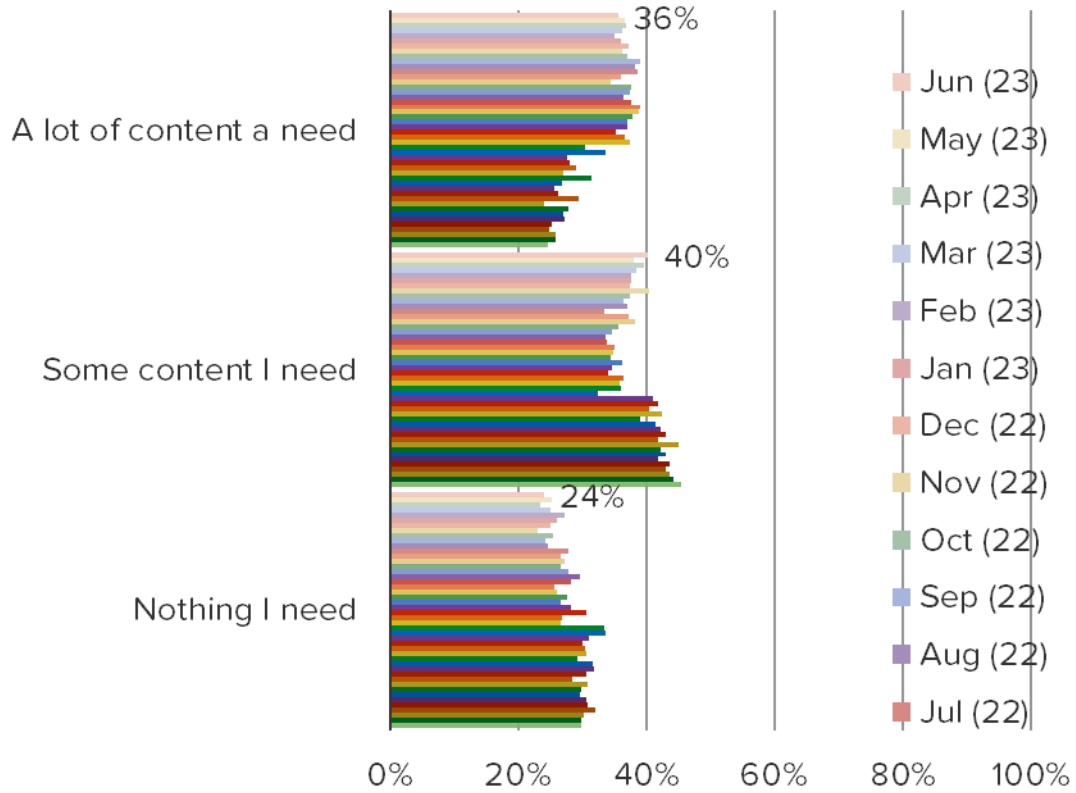
Apple TV+



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

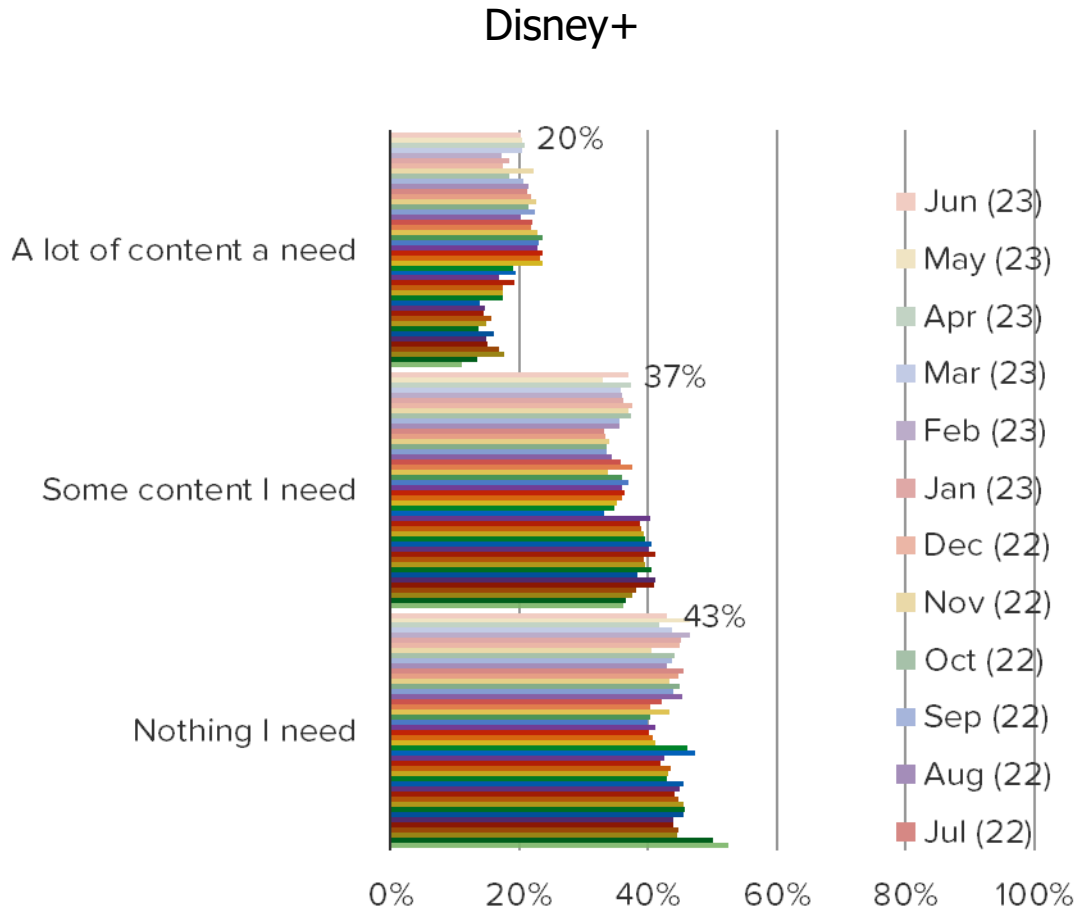
Posed to all respondents.

Netflix



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

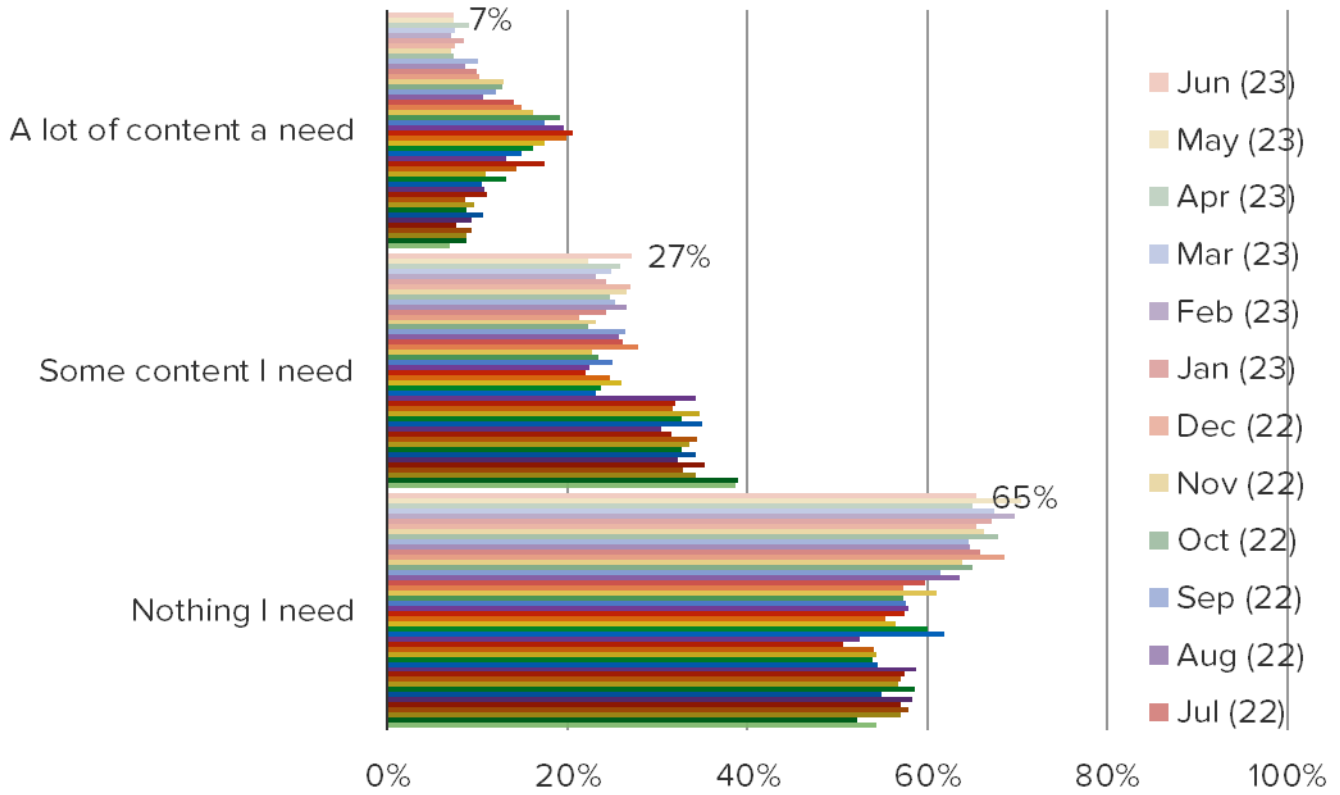
Posed to all respondents.



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

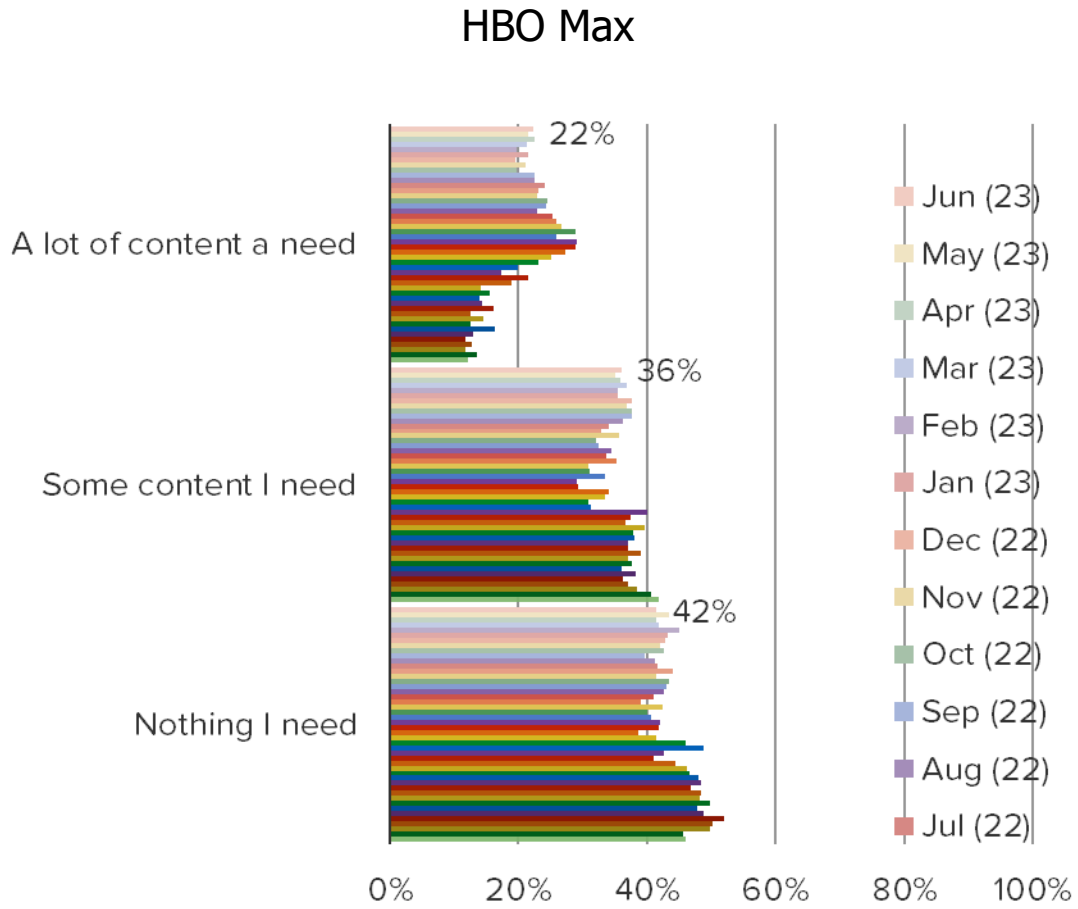
Posed to all respondents.

Apple TV+



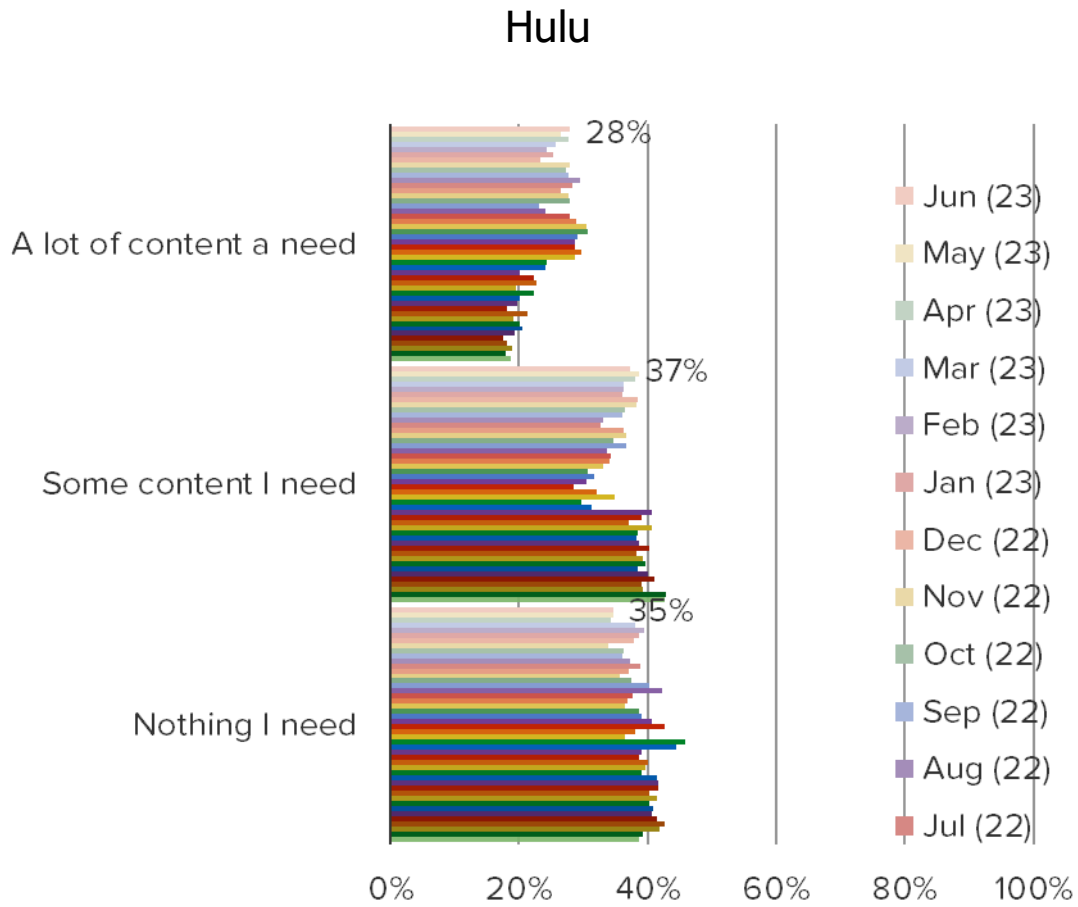
WHAT ARE YOUR EXPECTATIONS FOR THE CONTENT THAT WILL BE ON EACH OF THESE PLATFORMS GOING FORWARD?

Posed to all respondents.



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

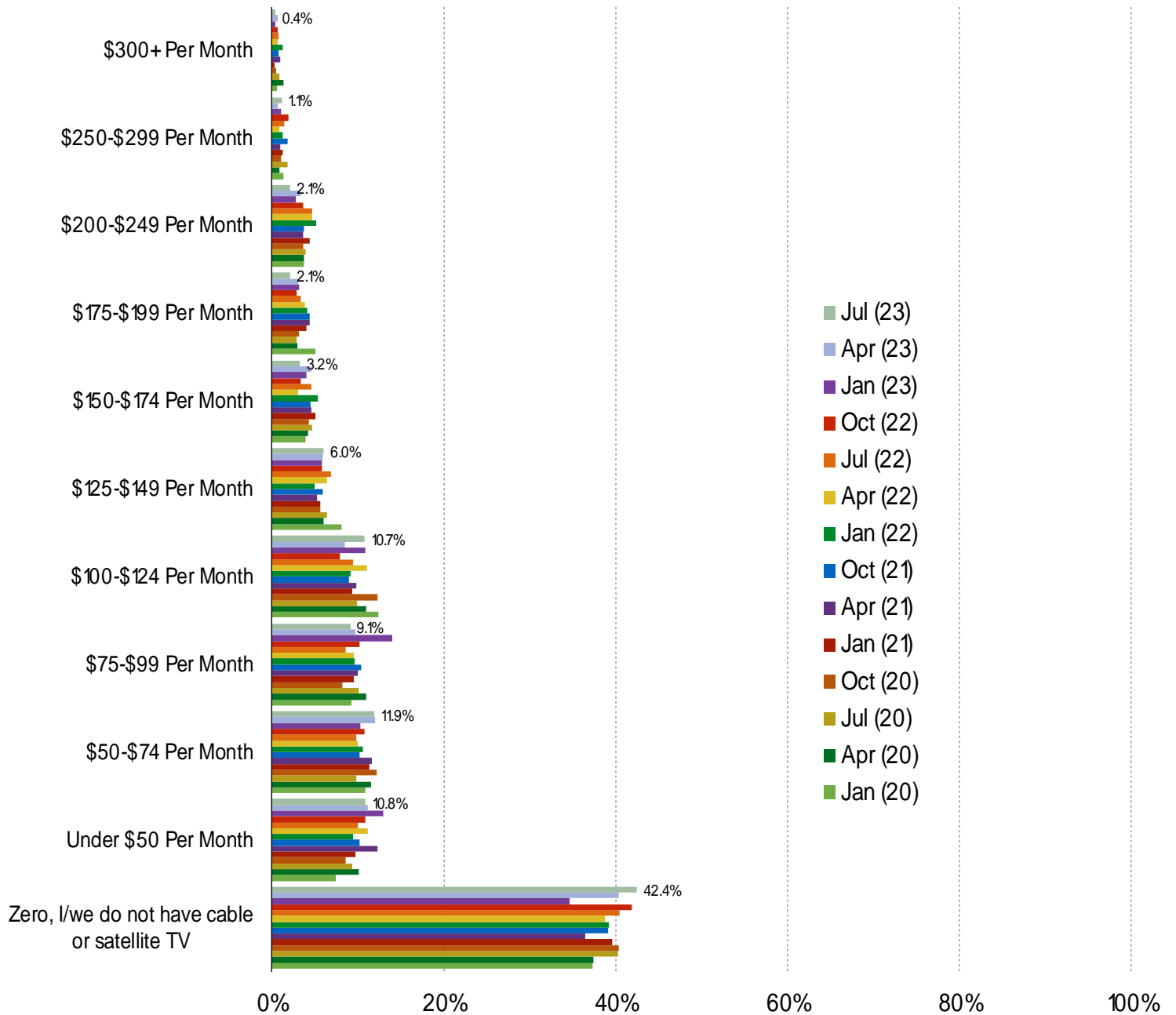
Posed to all respondents.



SPEND ON CONTENT

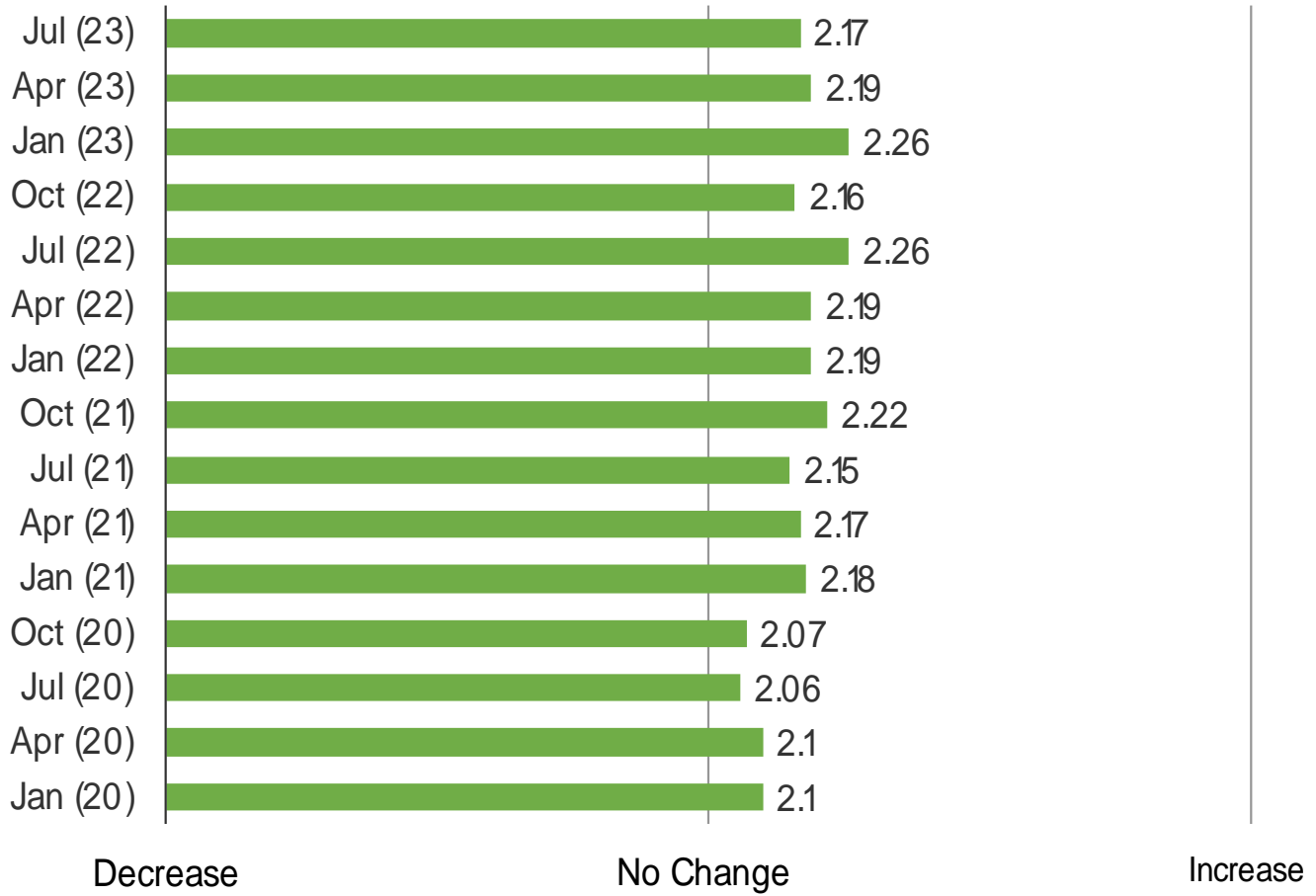
APPROXIMATELY HOW MUCH DO YOU SPEND ON CABLE/SATELLITE TV SERVICES PER MONTH?

Posed to respondents who watch video content at home.



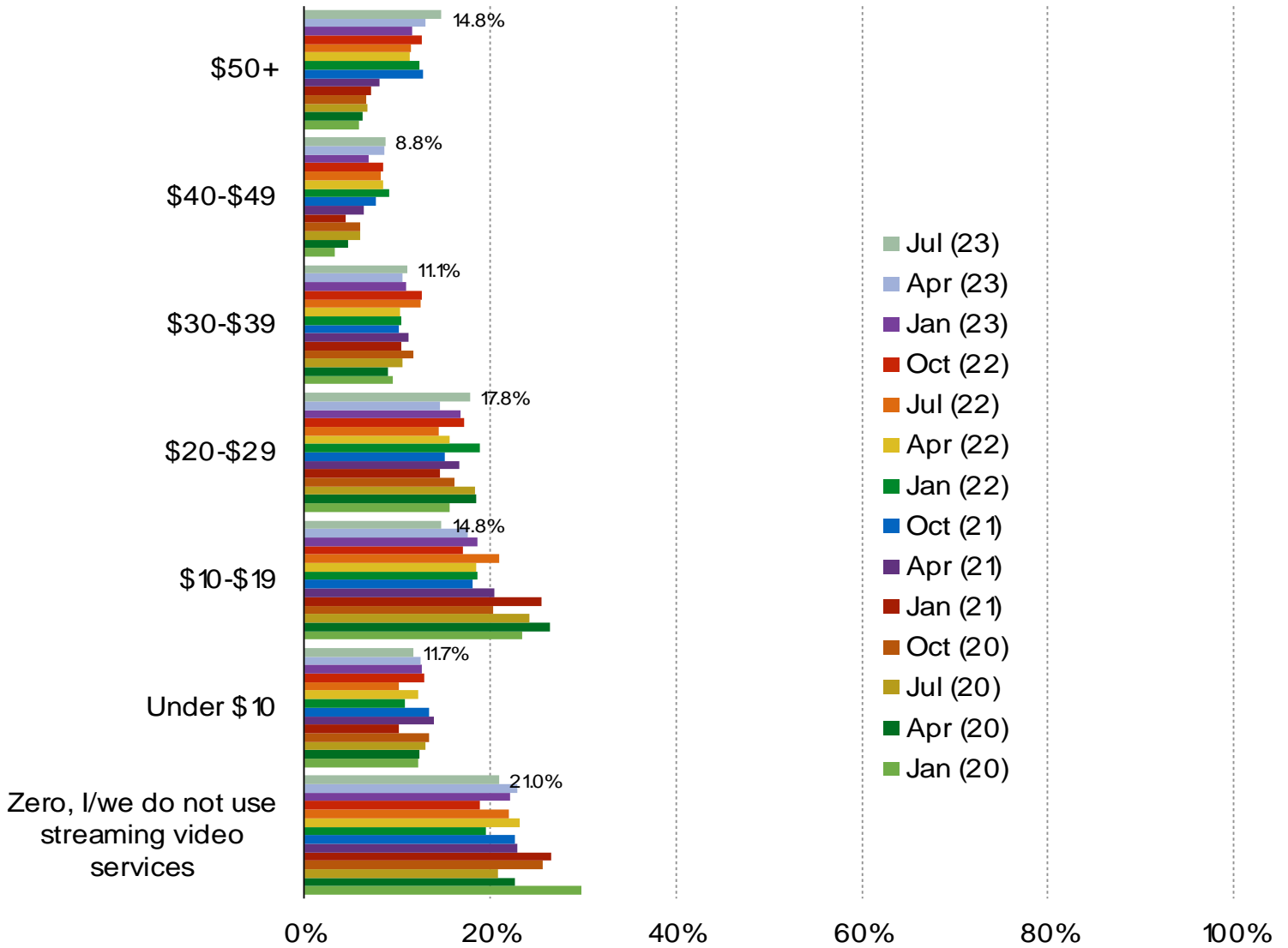
IN THE NEXT YEAR, DO YOU EXPECT THE AMOUNT YOU PAY PER MONTH FOR CABLE OR SATELLITE TV TO CHANGE IN ANY WAY?

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



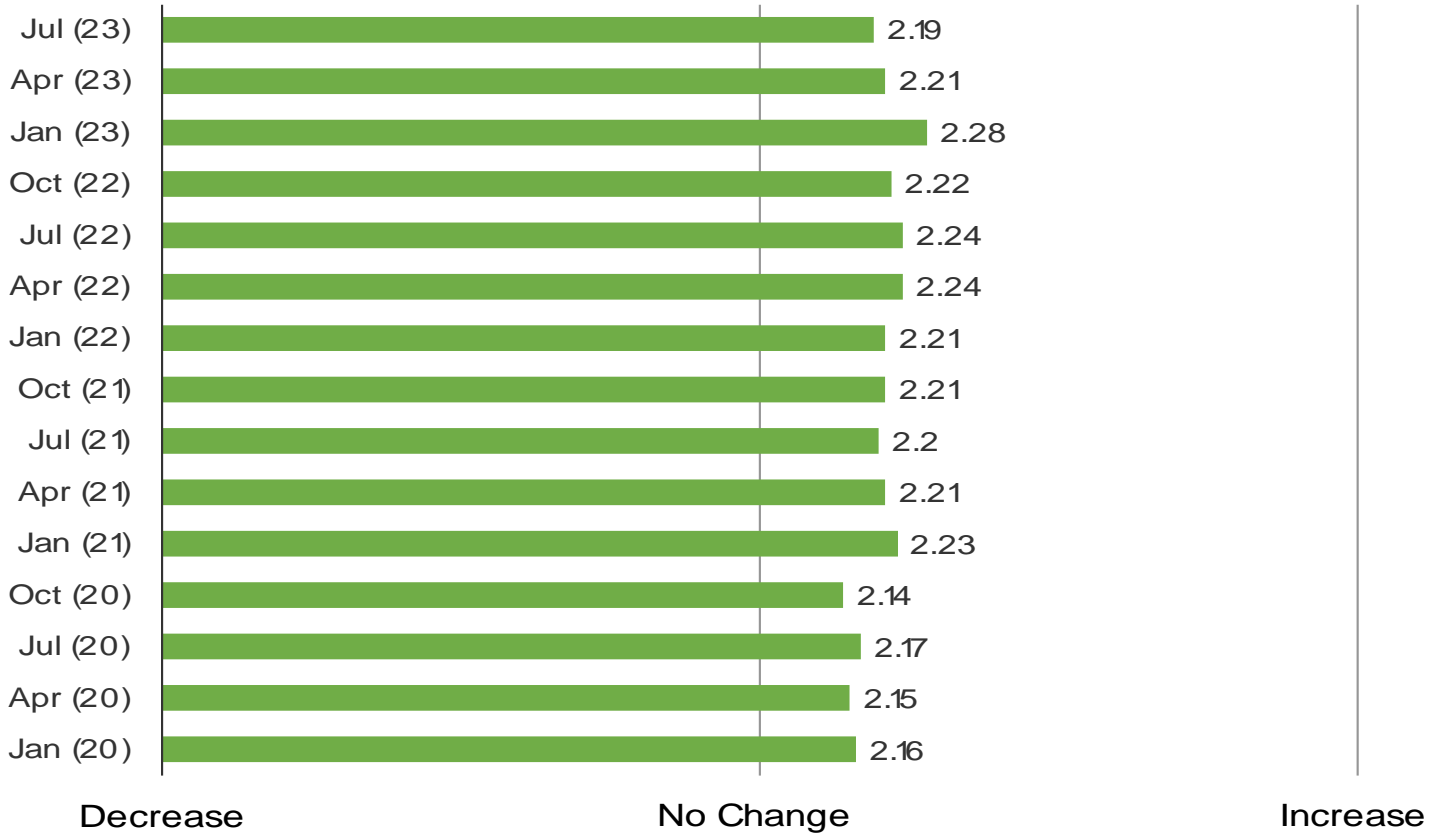
APPROXIMATELY HOW MUCH DO YOU SPEND ON STREAMING VIDEO SERVICES PER MONTH?

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?

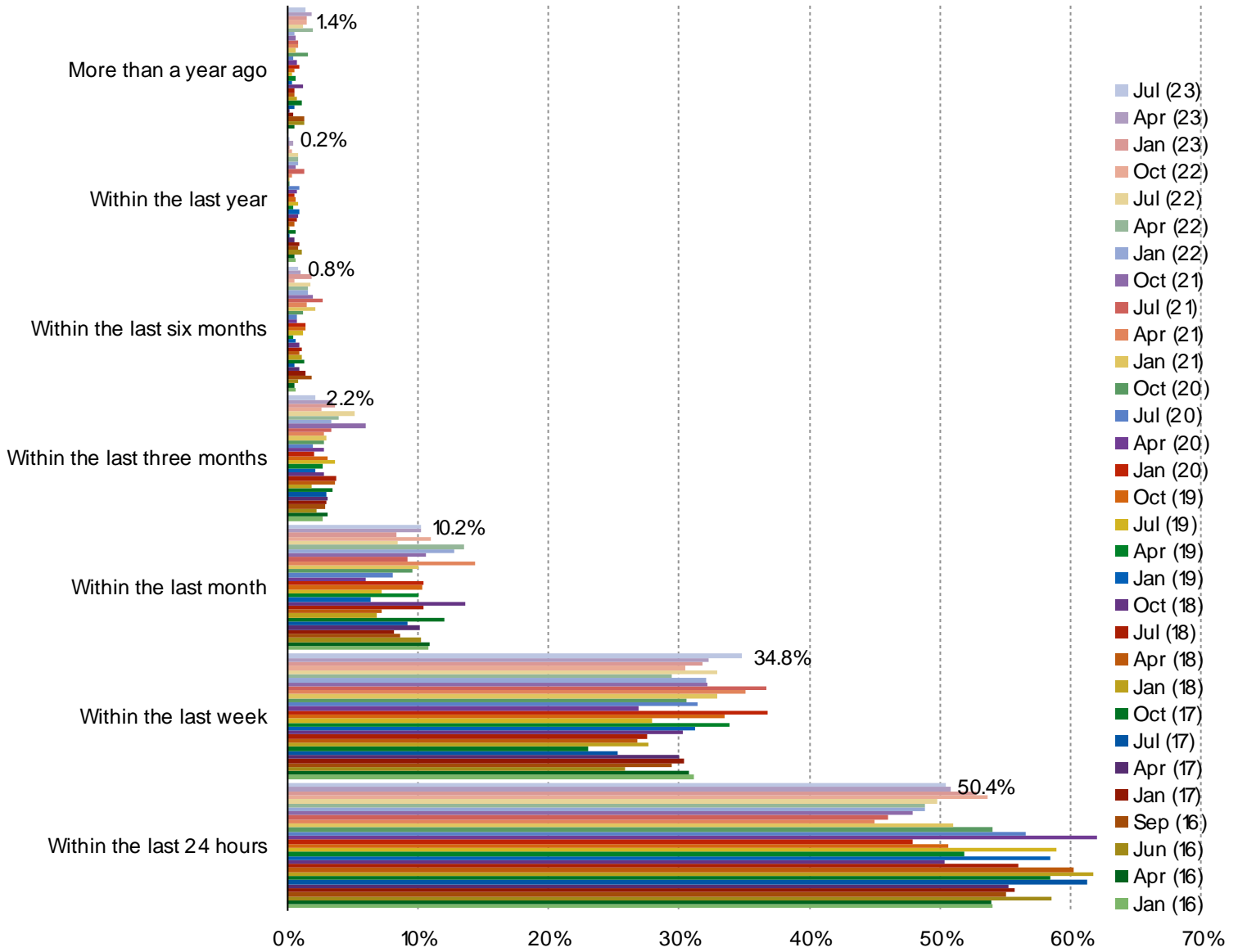
Posed to respondents who currently pay for cable or satellite tv.



NETFLIX SUBSCRIBER ENGAGEMENT

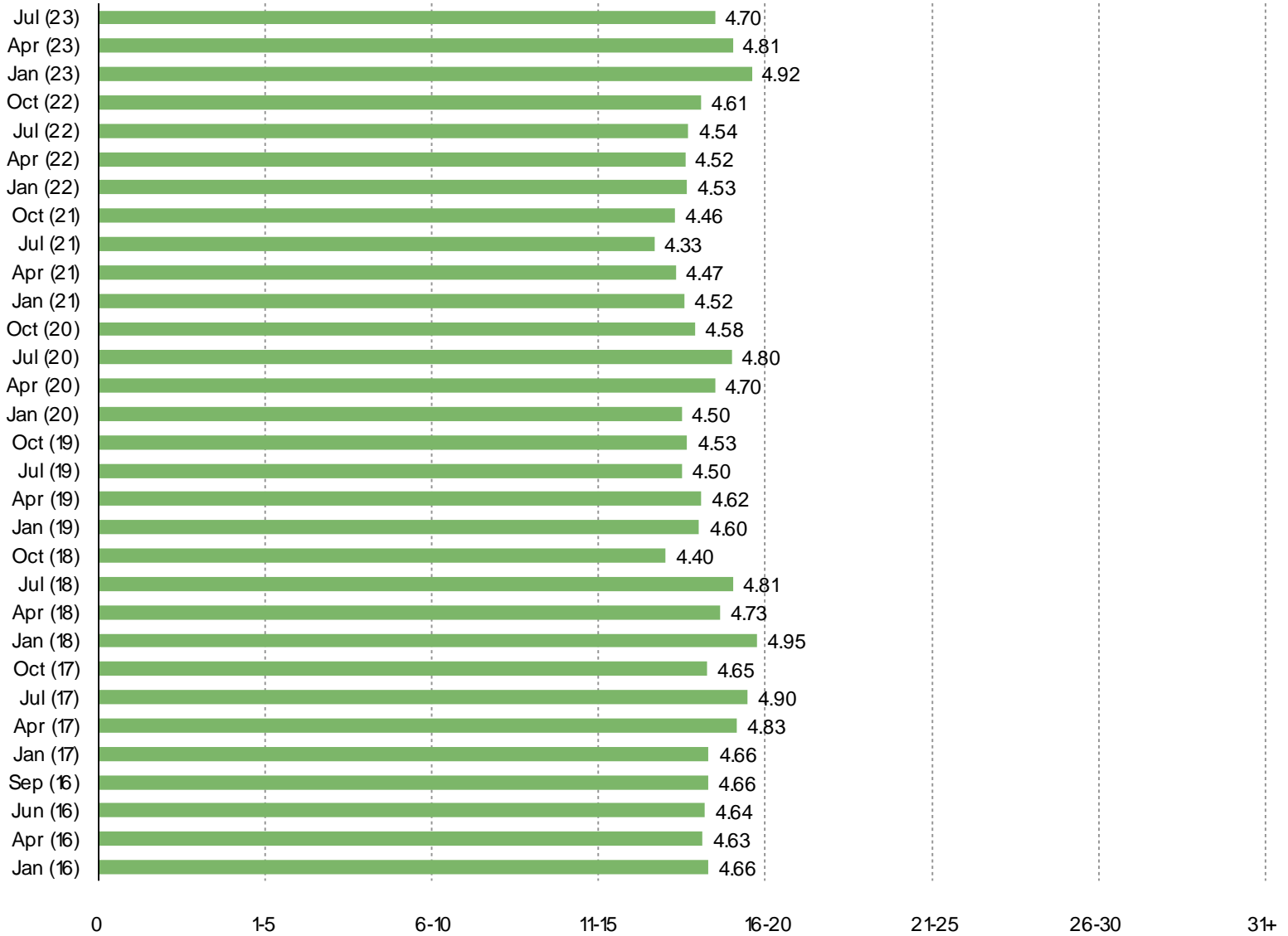
WHEN IS THE LAST TIME YOU WATCHED SOMETHING ON NETFLIX?

Posed to Netflix subscribers.



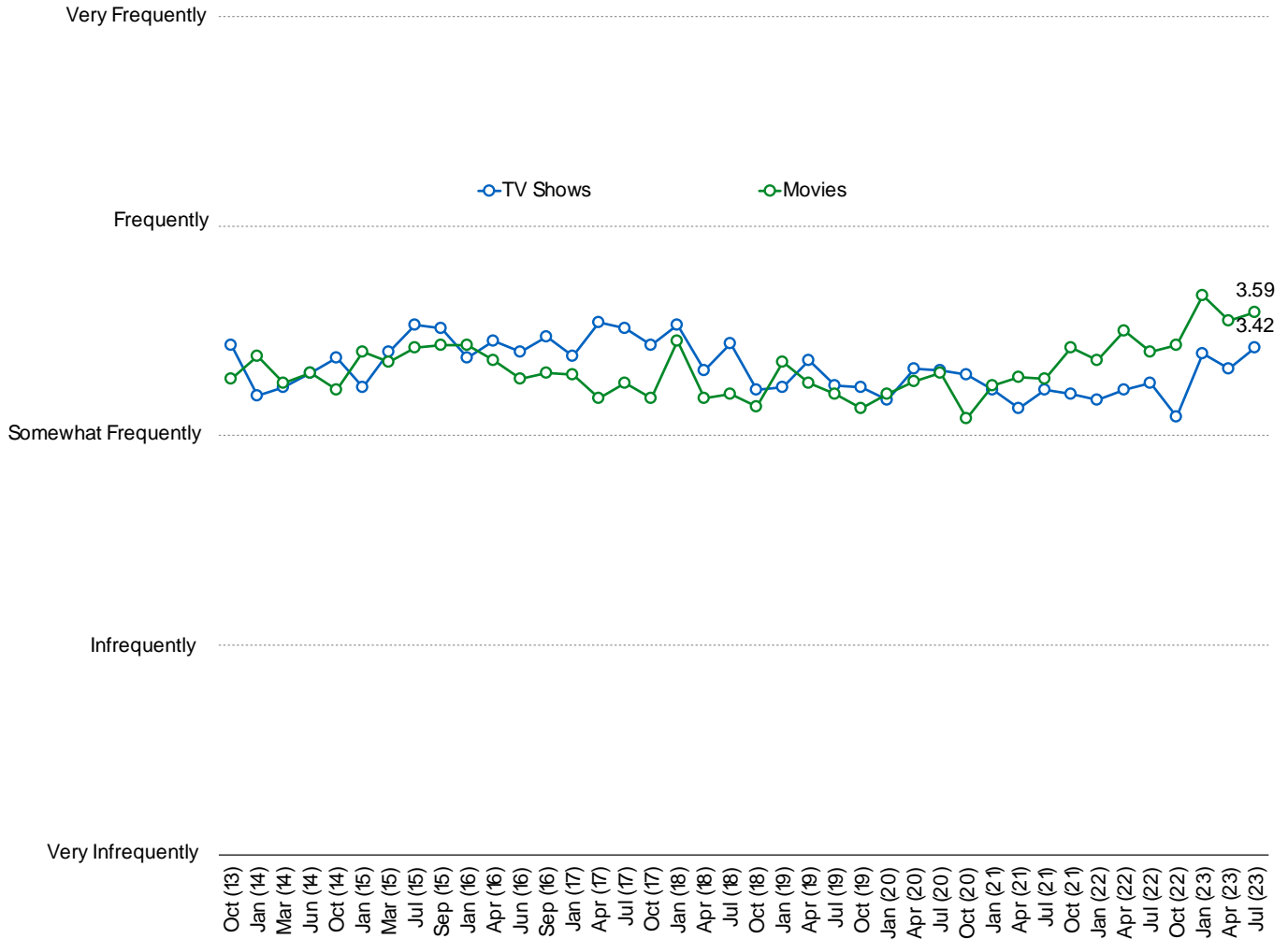
IN AN AVERAGE MONTH, HOW MANY HOURS OF NETFLIX DO YOU WATCH?

Posed to Netflix subscribers.



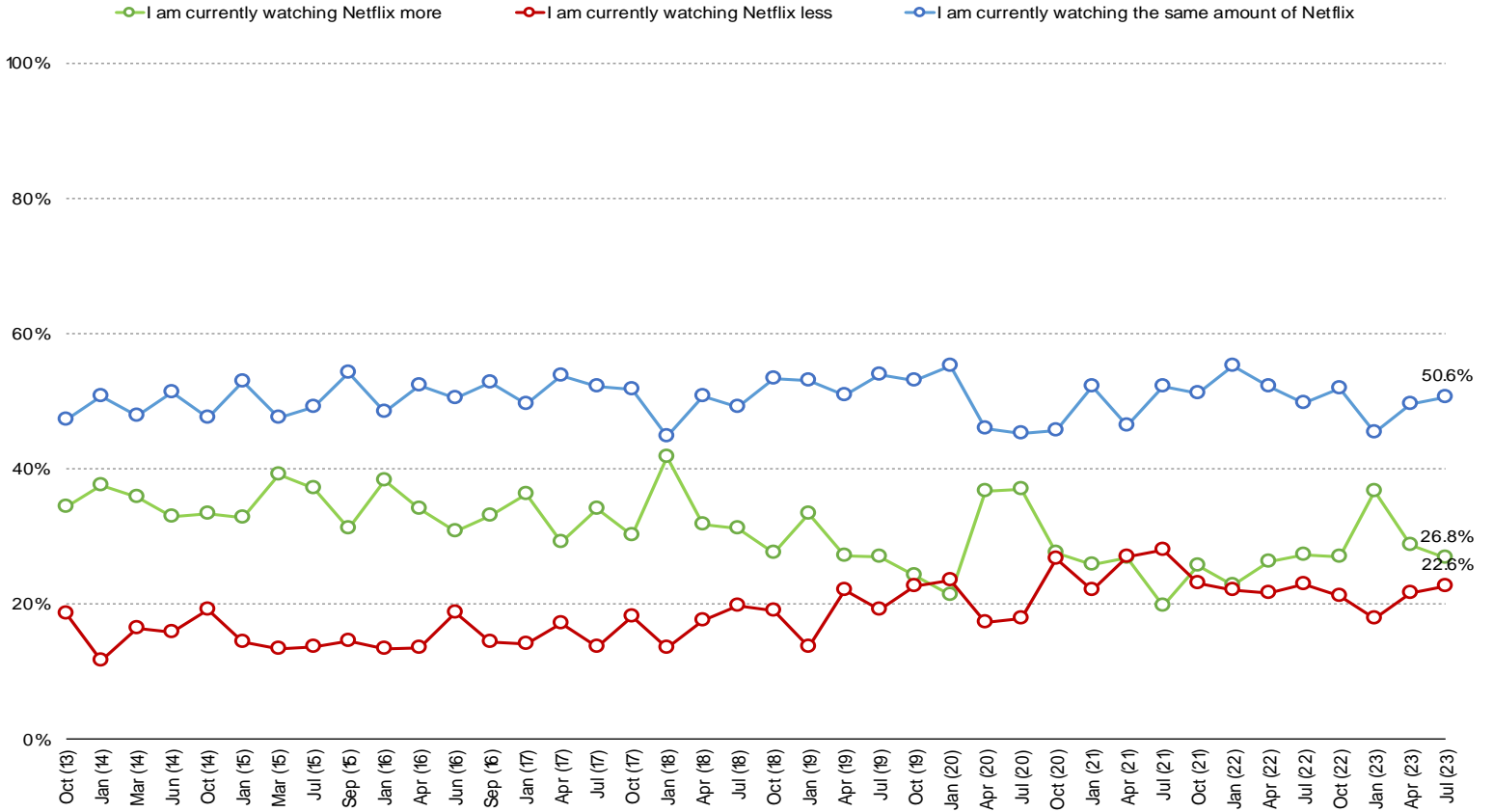
FREQUENCY OF WATCHING TV SHOWS AND MOVIES

Posed to Netflix subscribers.



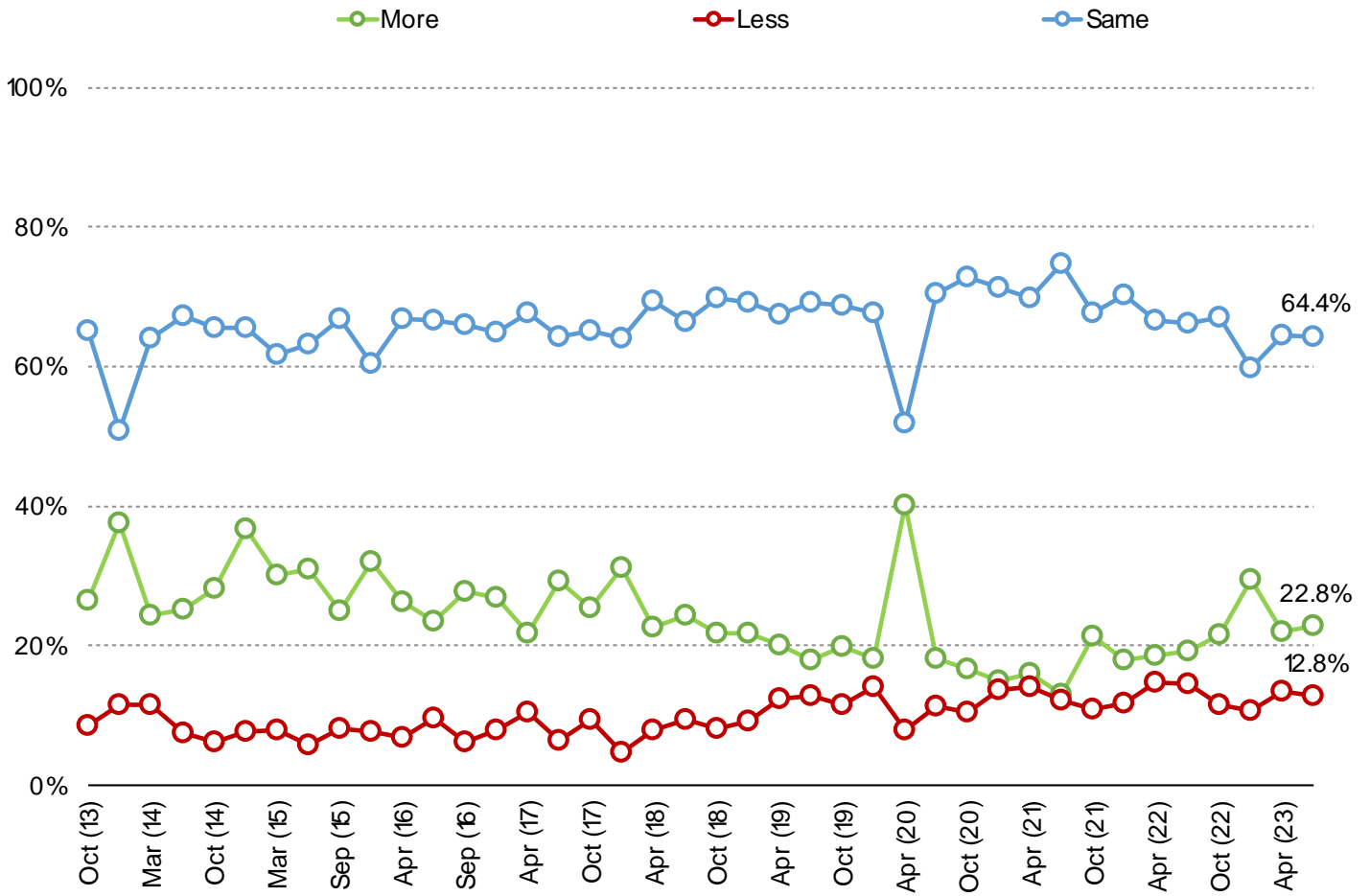
PLEASE COMPARE YOUR CURRENT USAGE OF NETFLIX WITH YOUR USAGE 3-6 MONTHS AGO.

Posed to Netflix subscribers.



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

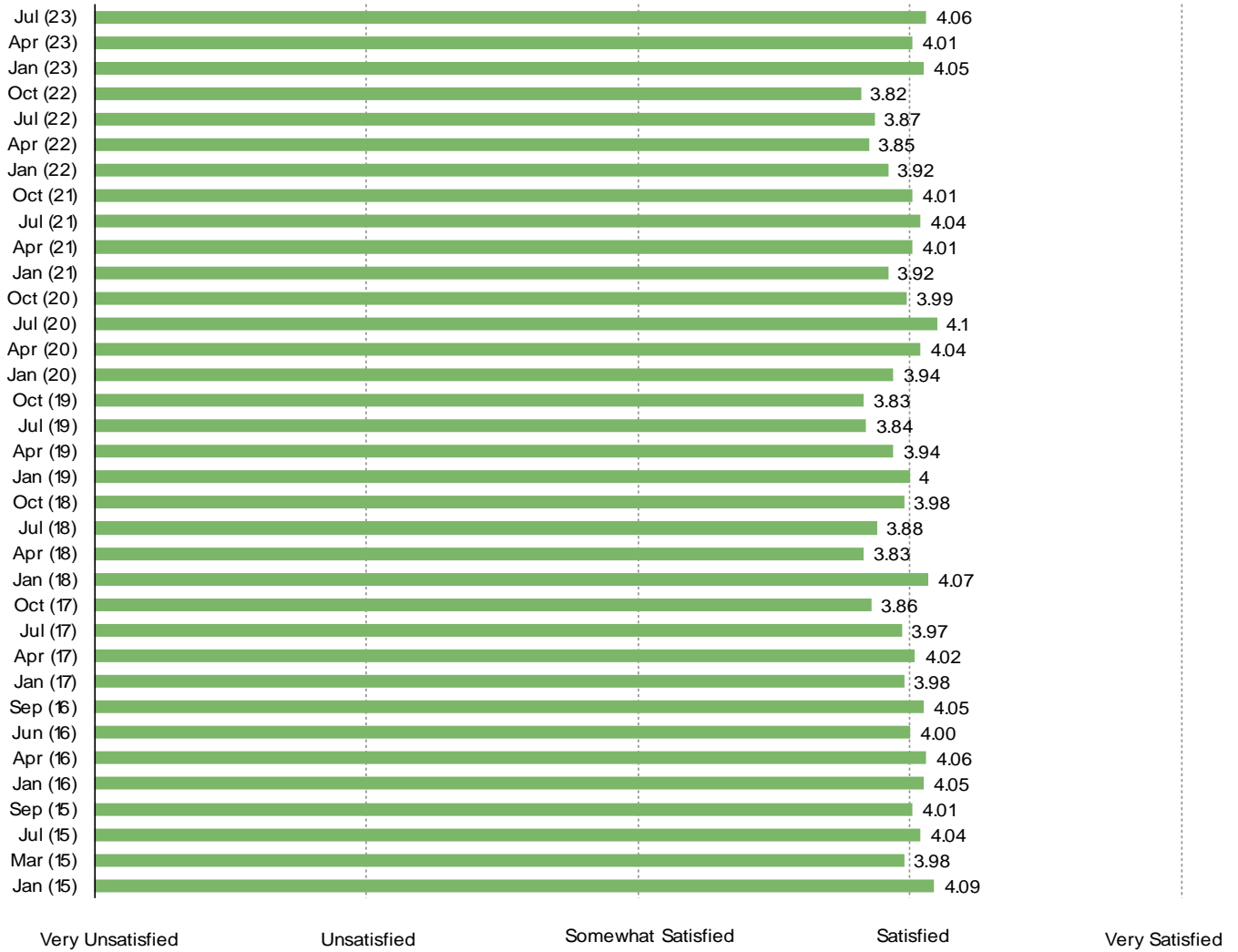
Posed to Netflix subscribers.



NETFLIX PRICING POWER

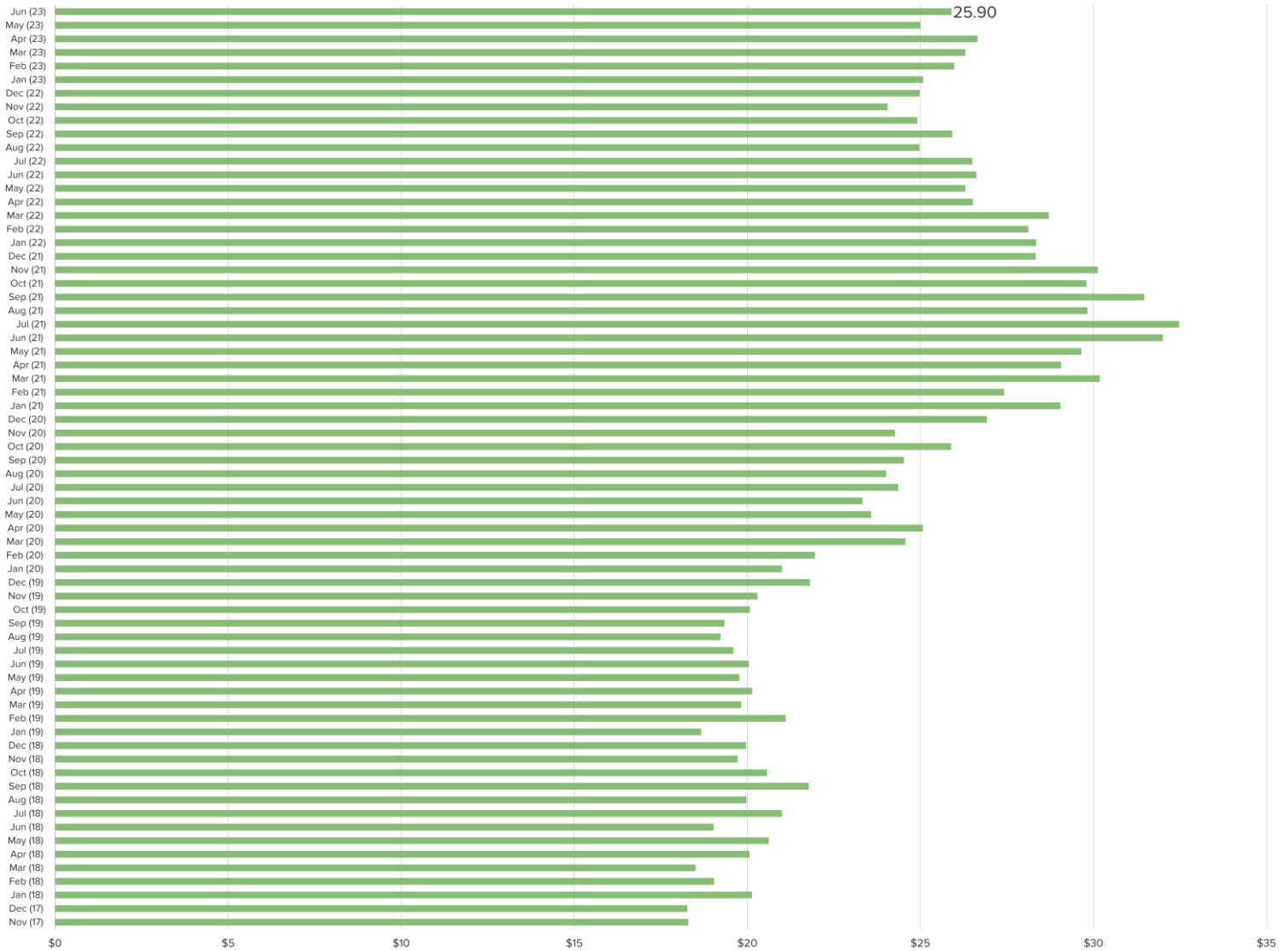
SATISFACTION WITH THE VALUE THEY RECEIVE FOR THE MONEY WITH NETFLIX

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?)

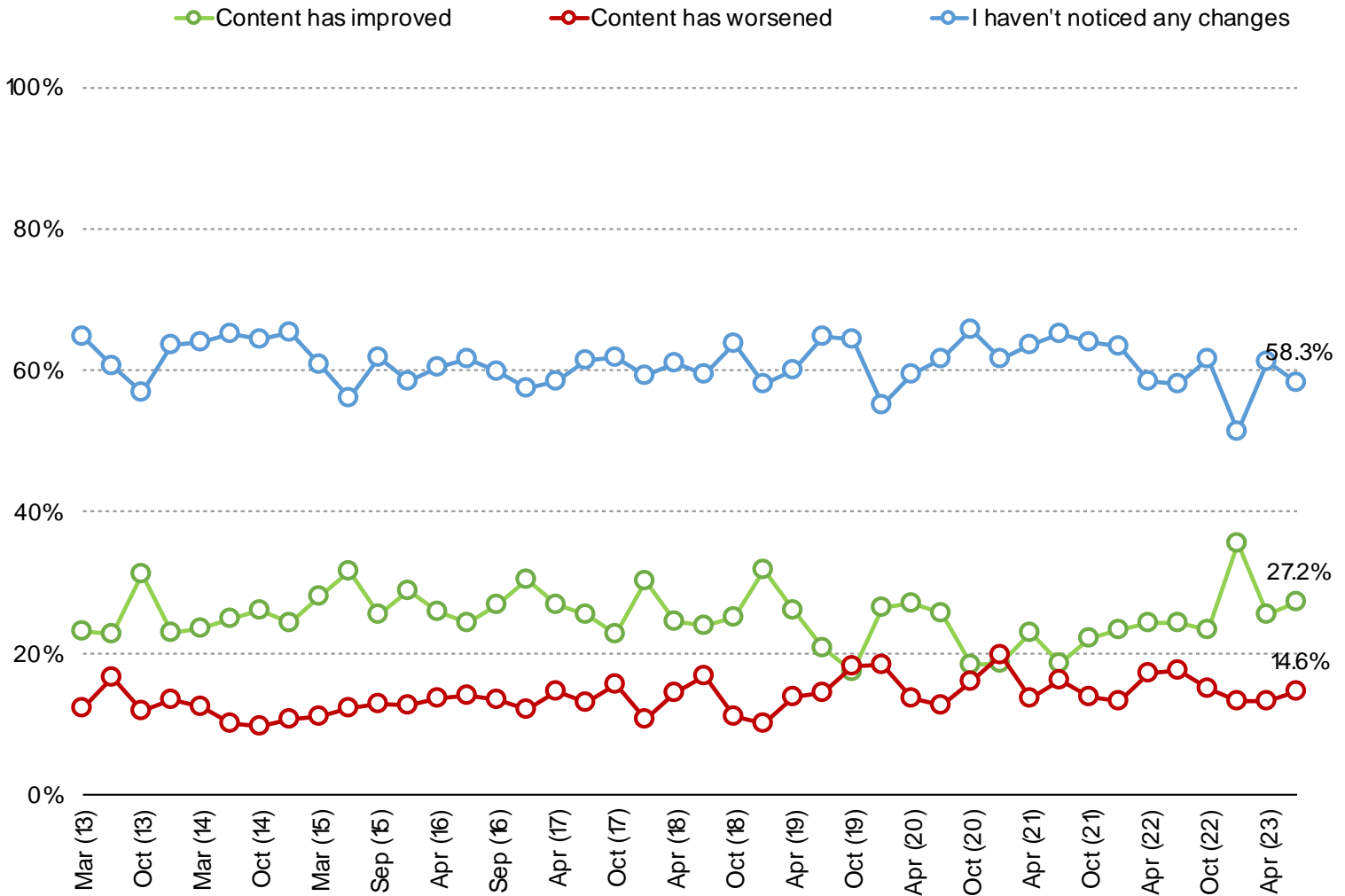
Posed to Netflix subscribers.



NETFLIX CONTENT

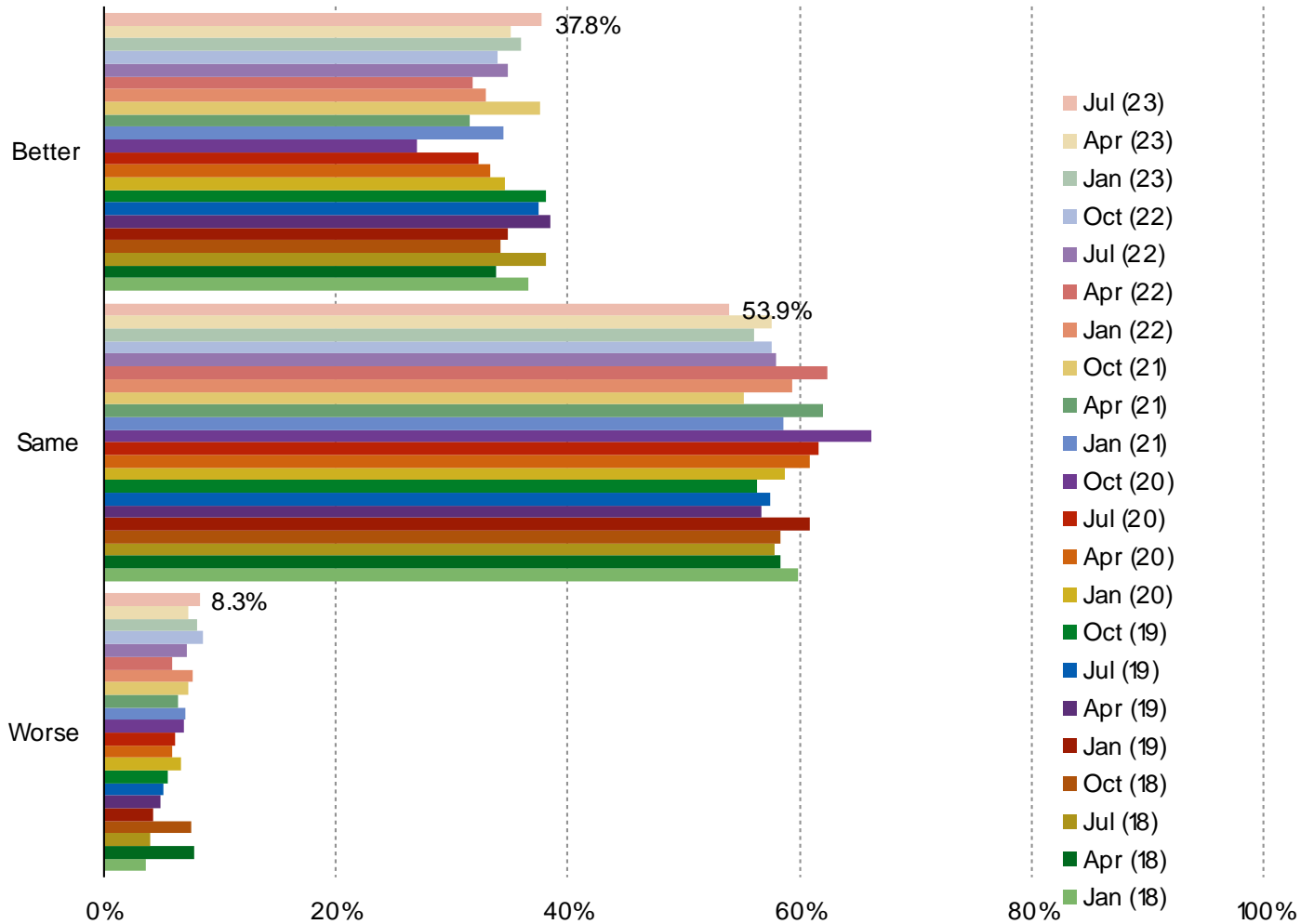
HAVE YOU NOTICED ANY CHANGES TO NETFLIX'S CONTENT OVER THE LAST SIX MONTHS?

Posed to Netflix subscribers.



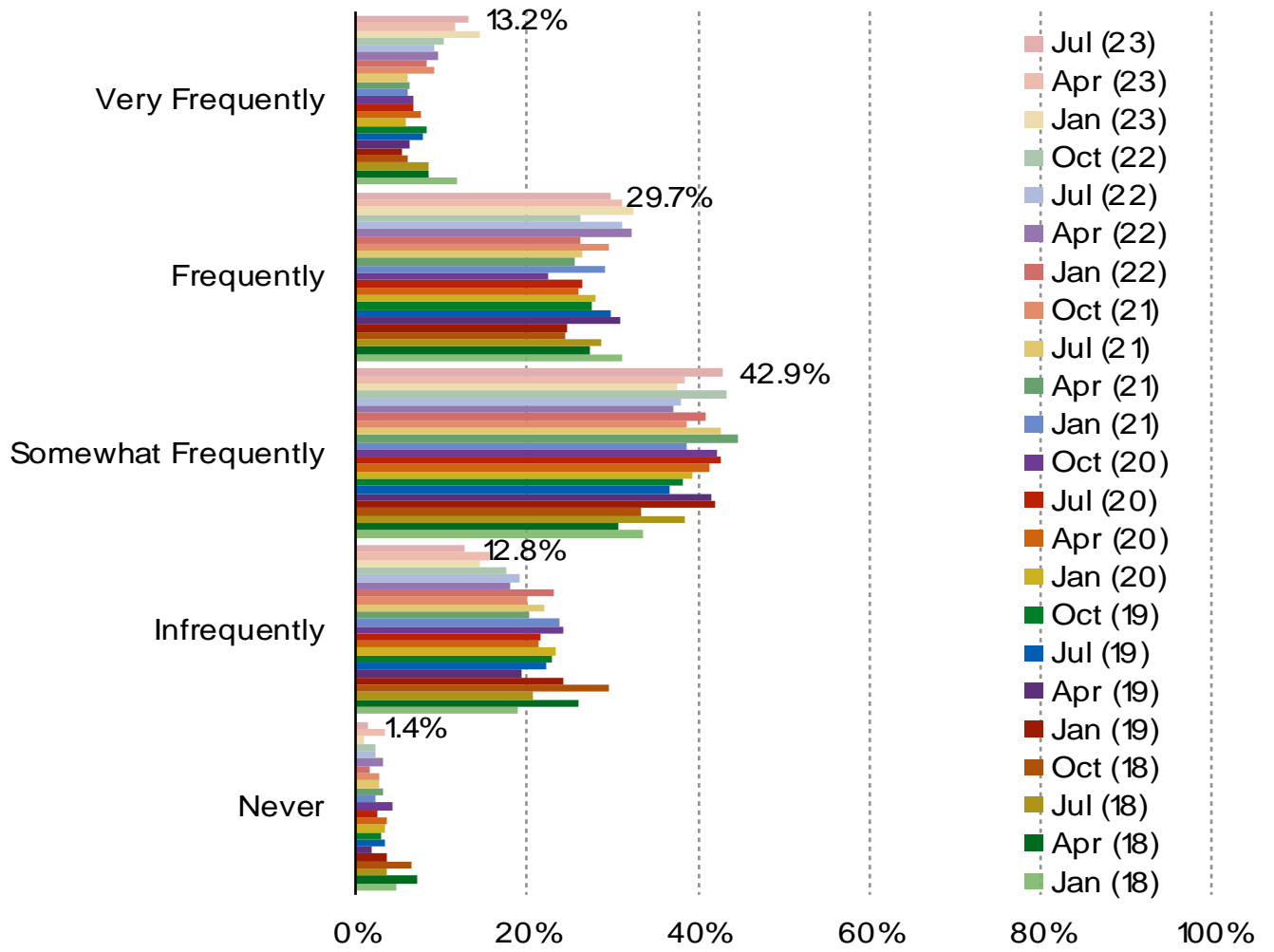
HOW DO YOU COMPARE NETFLIX ORIGINAL CONTENT SHOWS AGAINST SHOWS YOU VIEW ON OTHER NETWORKS OR SERVICES?

Posed to Netflix subscribers.



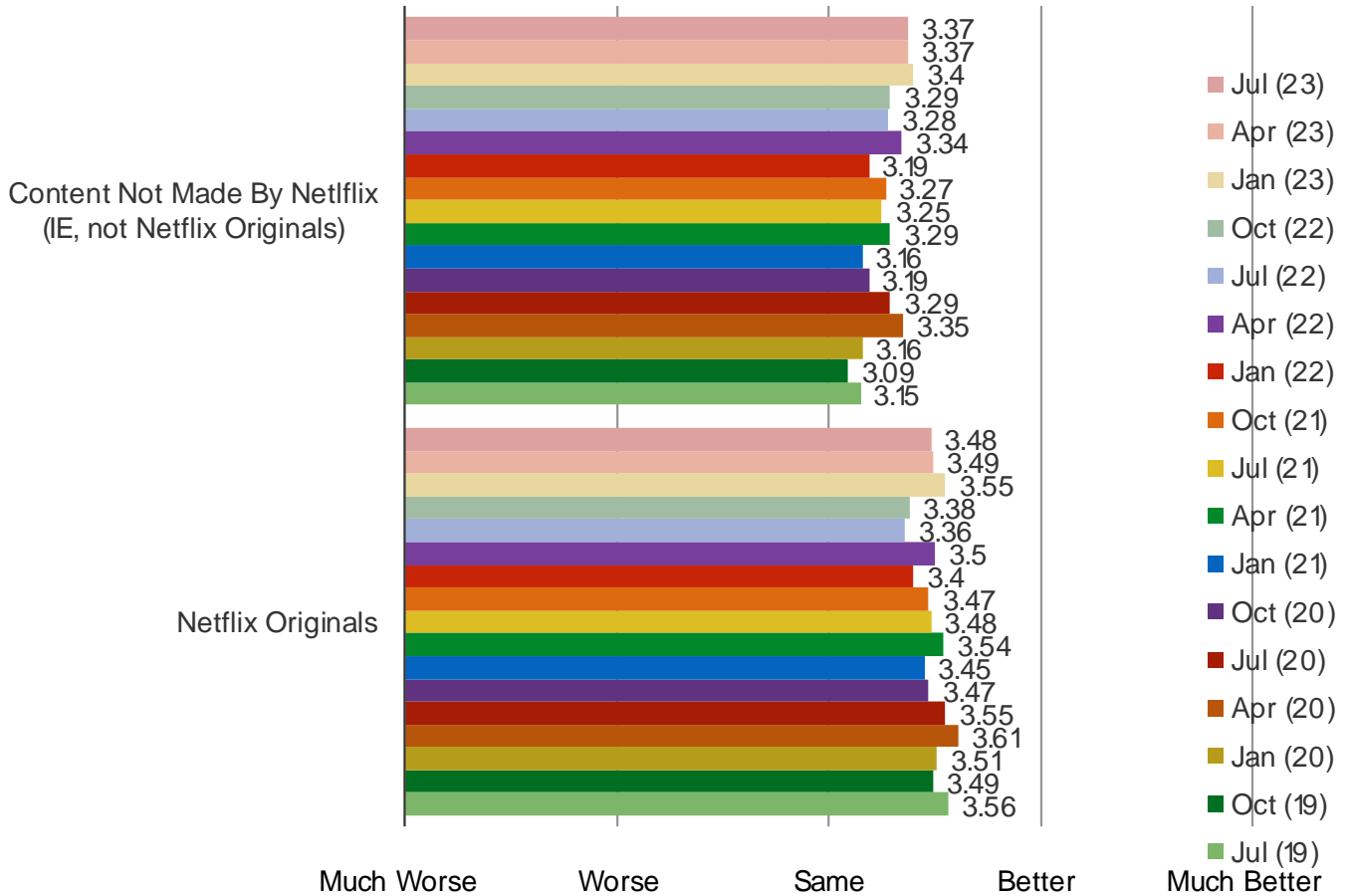
HOW OFTEN DO YOU WATCH NETFLIX ORIGINAL CONTENT SHOWS?

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?

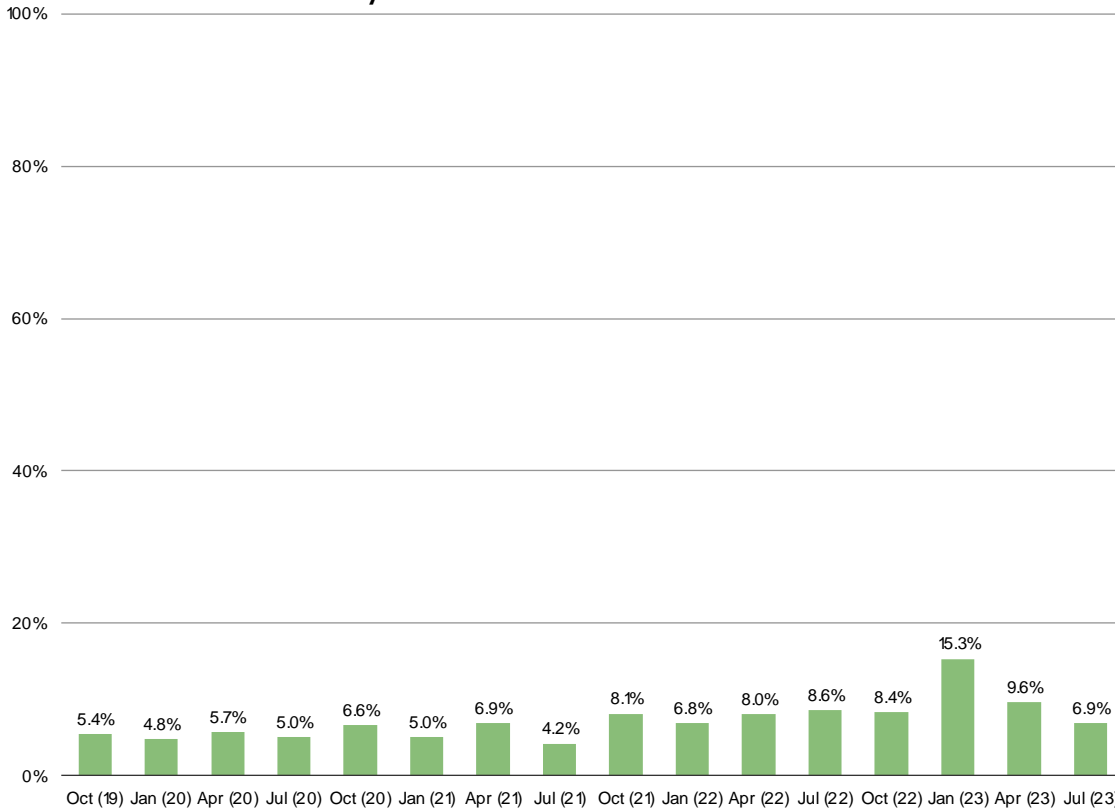
Posed to Netflix subscribers.



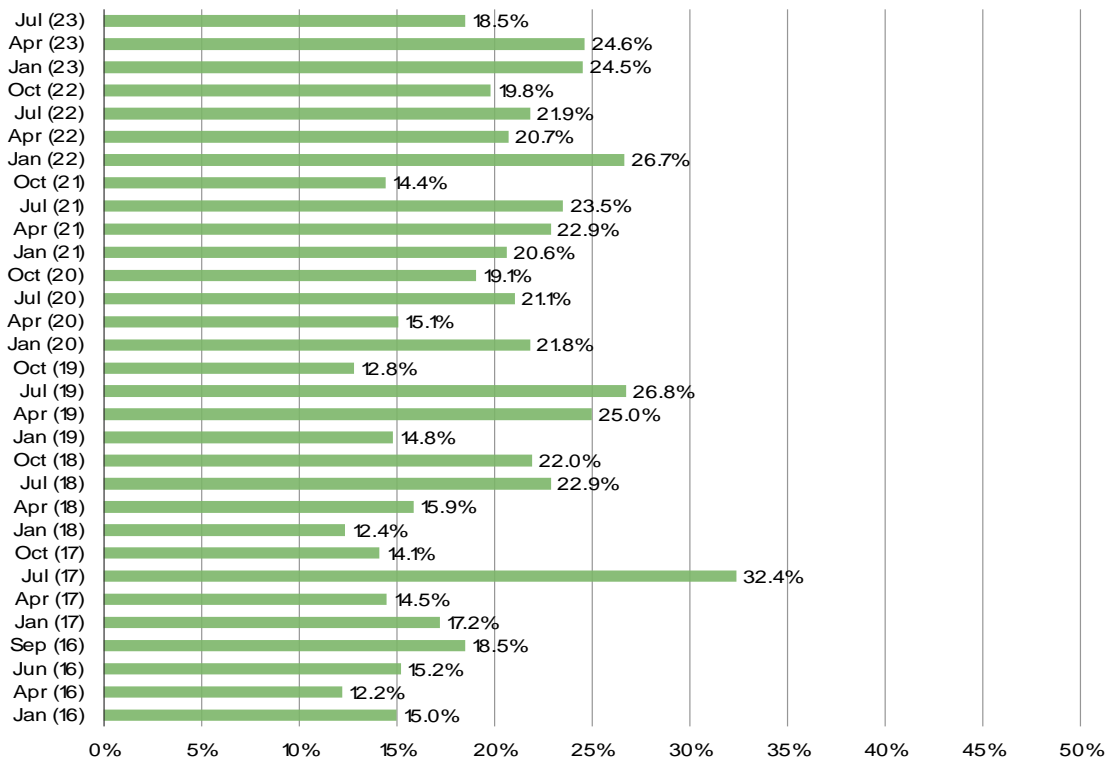
CYCLING IN AND OUT OF NETFLIX

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.



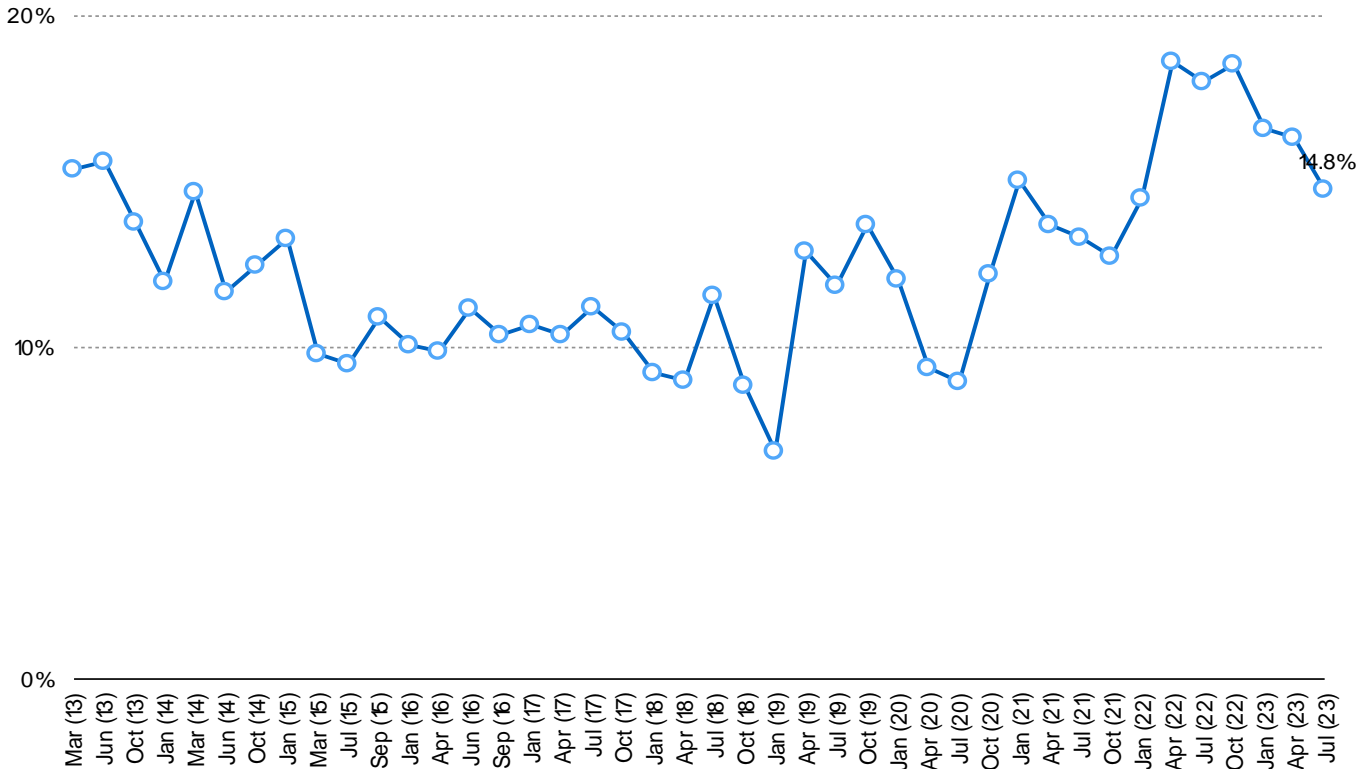
Posed to respondents who are not current Netflix subscribers but have been in the past.



NFLX CHURN

ARE YOU CONSIDERING CANCELLING YOUR NETFLIX SUBSCRIPTION?

Posed to Netflix subscribers.

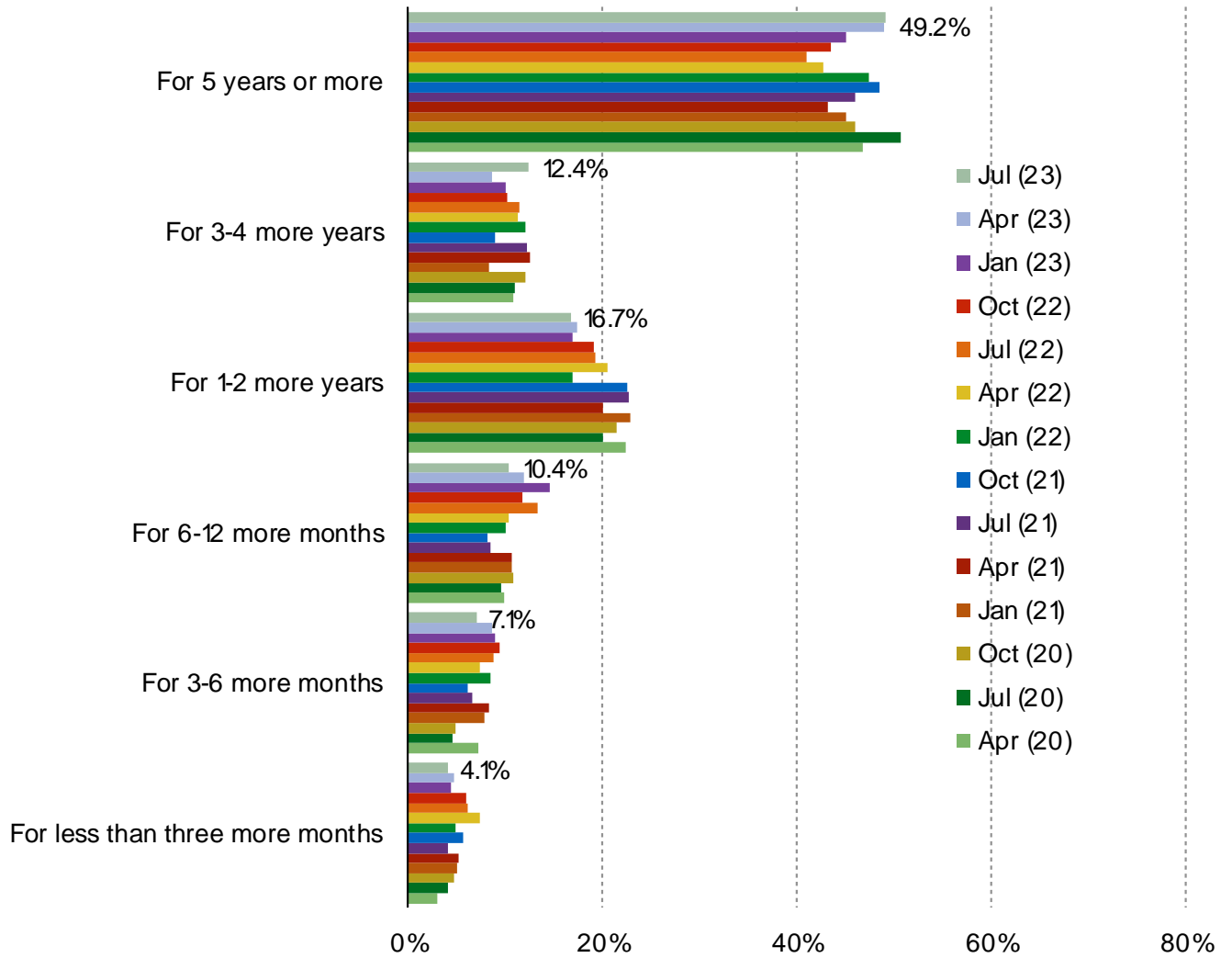


Why?



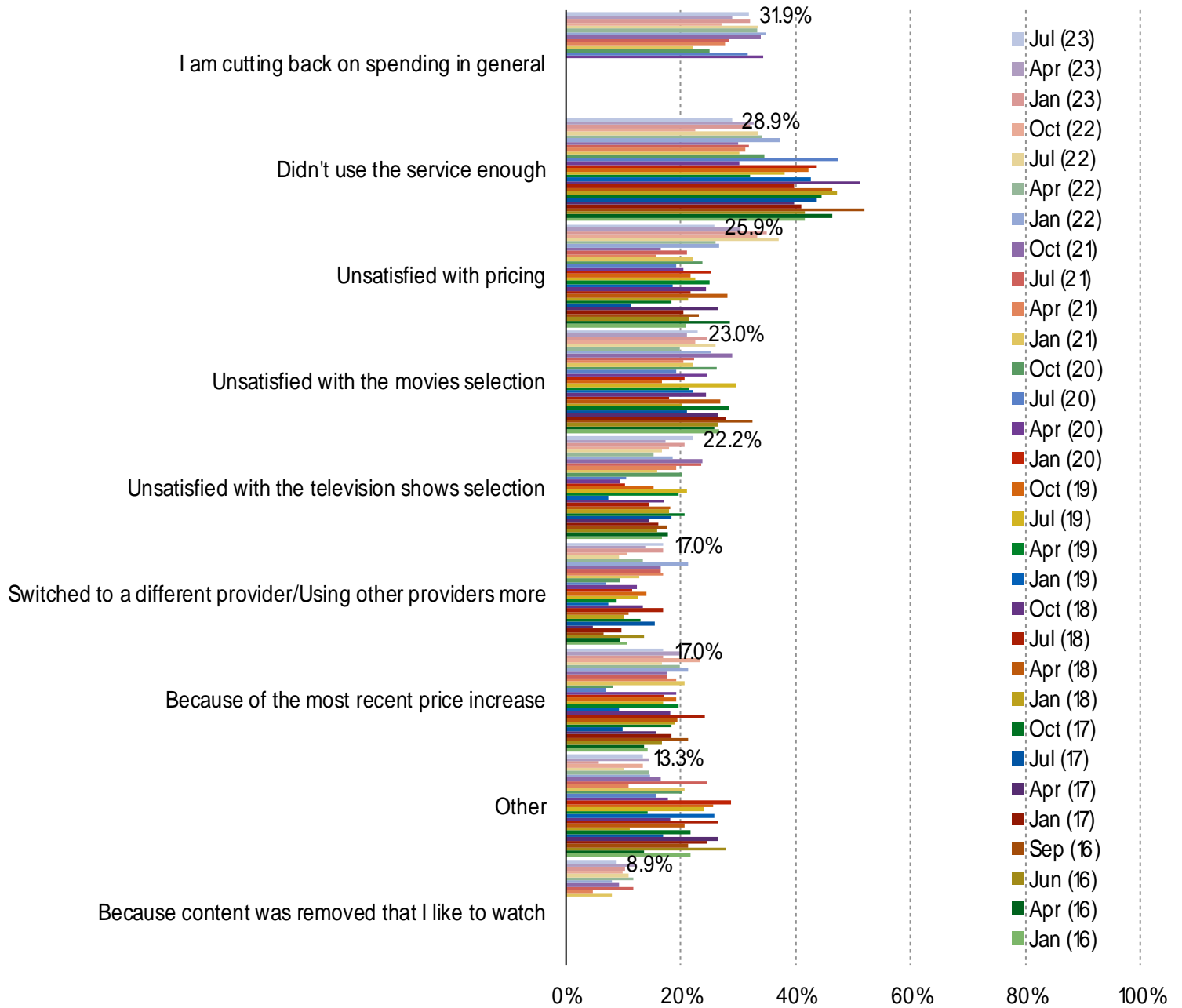
FOR HOW MUCH LONGER DO YOU EXPECT TO BE A NETFLIX SUBSCRIBER?

Posed to Netflix subscribers



FORMER NETFLIX SUBSCRIBERS – WHY DID YOU CANCEL?

Posed to former Netflix subscribers.



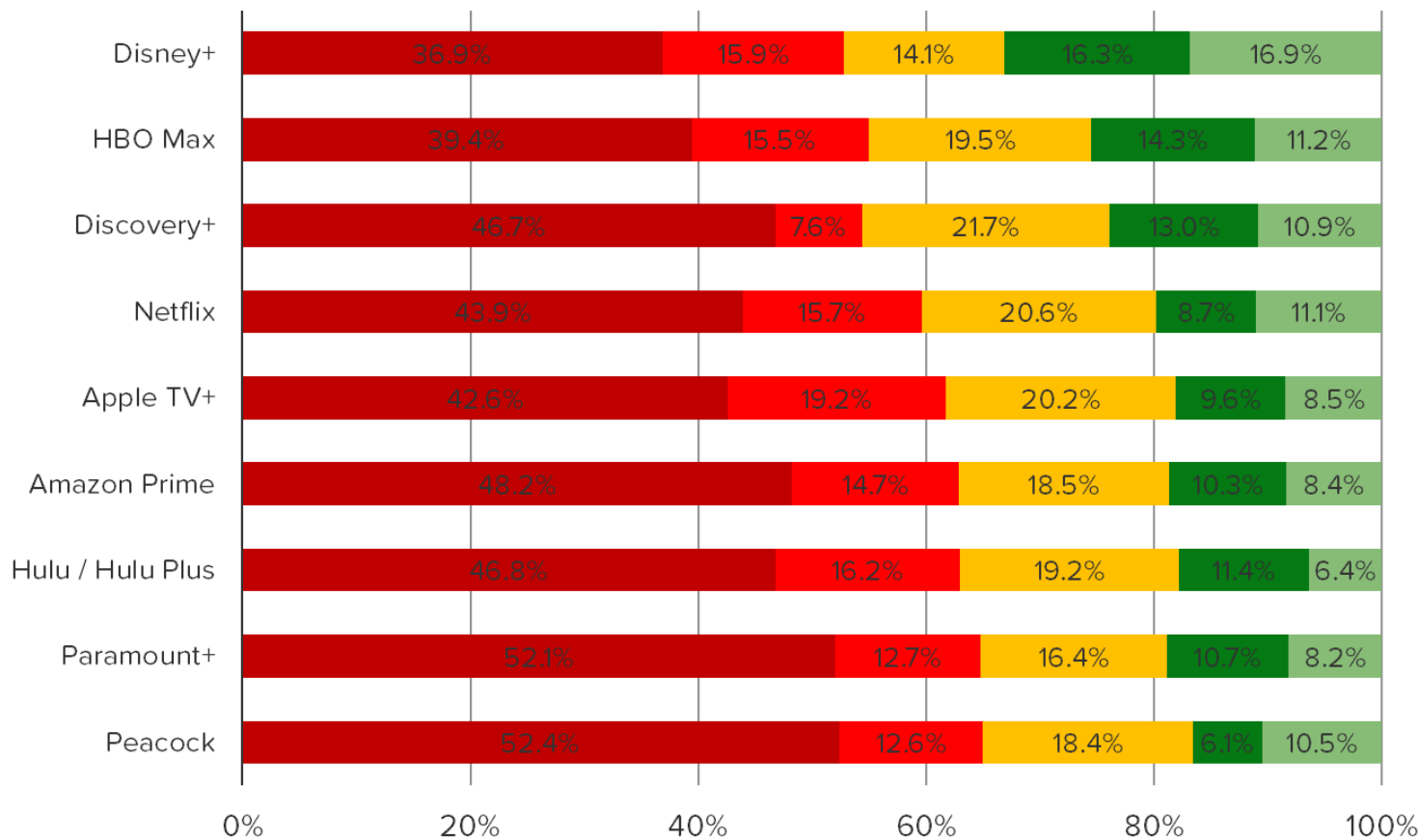
MOBILE GAMES AND STREAMING PLATFORMS

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.

JULY 2023

■ No at all interested ■ Slightly interested ■ Moderately interested ■ Very interested ■ Extremely interested



	N=
Peacock	277
Paramount+	244
Hulu / Hulu Plus	359
Amazon Prime	477
Apple TV+	94
Netflix	540
Discovery+	92
HBO Max	251
Disney+	320