

Streaming Video Survey

Volume 42 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: NFLX, DIS, T, CMCSA.

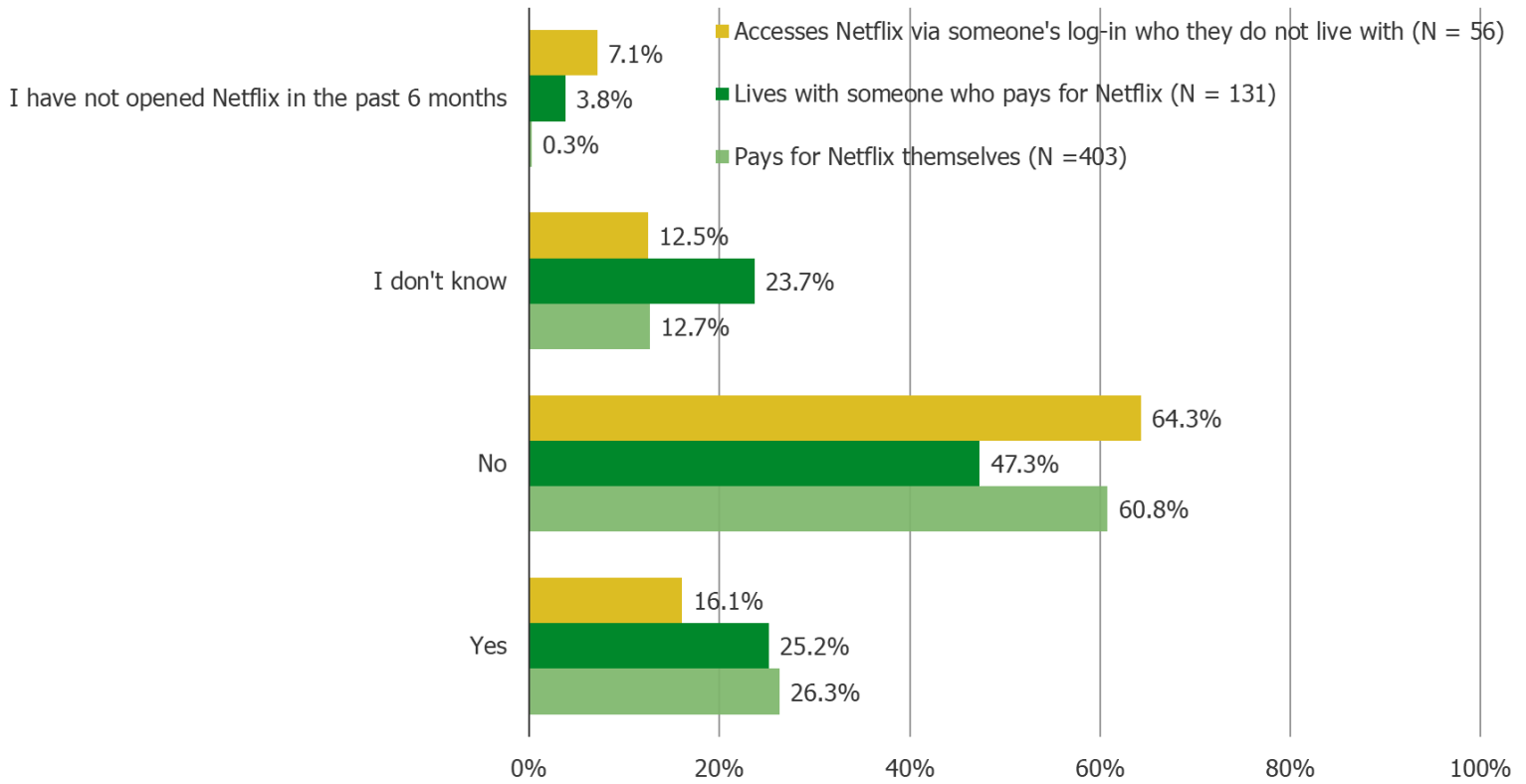
KPIs and Key questions

1. Of respondents who access a friend or family member's Netflix account, the share who say that the person whose account they access DOES NOT live with them has declined sequentially.
2. Among those who pay for Netflix themselves, a declining percentage said they let someone living outside their household access their Netflix account.
3. Of those who access someone else's Netflix who they do not live with, the share who said they had trouble accessing the account in the past month increased from 11.6% in July to 23.2% in our October wave.
4. Around a quarter of paying Netflix subscribers report having had to enter a code to re-authenticate Netflix in the past 6 months (16.1% of those who access someone else's account who they don't live with report having to re-authenticate).
5. Among those who were forced to re-authenticate, a relatively small percentage said they were not able to authenticate and just stopped accessing Netflix (4.4%).
6. Consumers would have a favorable opinion of their favorite cable news personalities being available on streaming video apps. Younger respondents are especially likely to have a favorable view of these personalities reaching them via streaming video or directly through social media. Older respondents prefer cable TV.
7. The share of Netflix subscribers on Standard with Ads ticked up slightly q/q, but remains the least popular option based on survey responses.
8. Feedback around expected pricing and ad-load on Netflix standard with ads remains consistent/favorable.
9. Of respondents on Standard with Ads, 18.9% said they were sharing an account with someone they do not live with before they signed up. 39.6% said they were not previously accessing Netflix in any way and 34.8% said they were on a higher price Netflix plan.
10. Though not a new trend, the share of consumers stating that streaming is their preferred method over Cable for watching both TV shows and movies continues to increase and remains on the trajectory we have observed since we started tracking this back in 2013.
11. Consumers self-report increasing monthly spend on streaming video services and decreasing monthly spend on cable TV.
12. The share of Netflix subscribers considering cancelling is down y/y but up a bit q/q. Among those who are considering cancelling, and among those who recently cancelled, the top complaints are around pricing / price increases.

NEW QUESTIONS

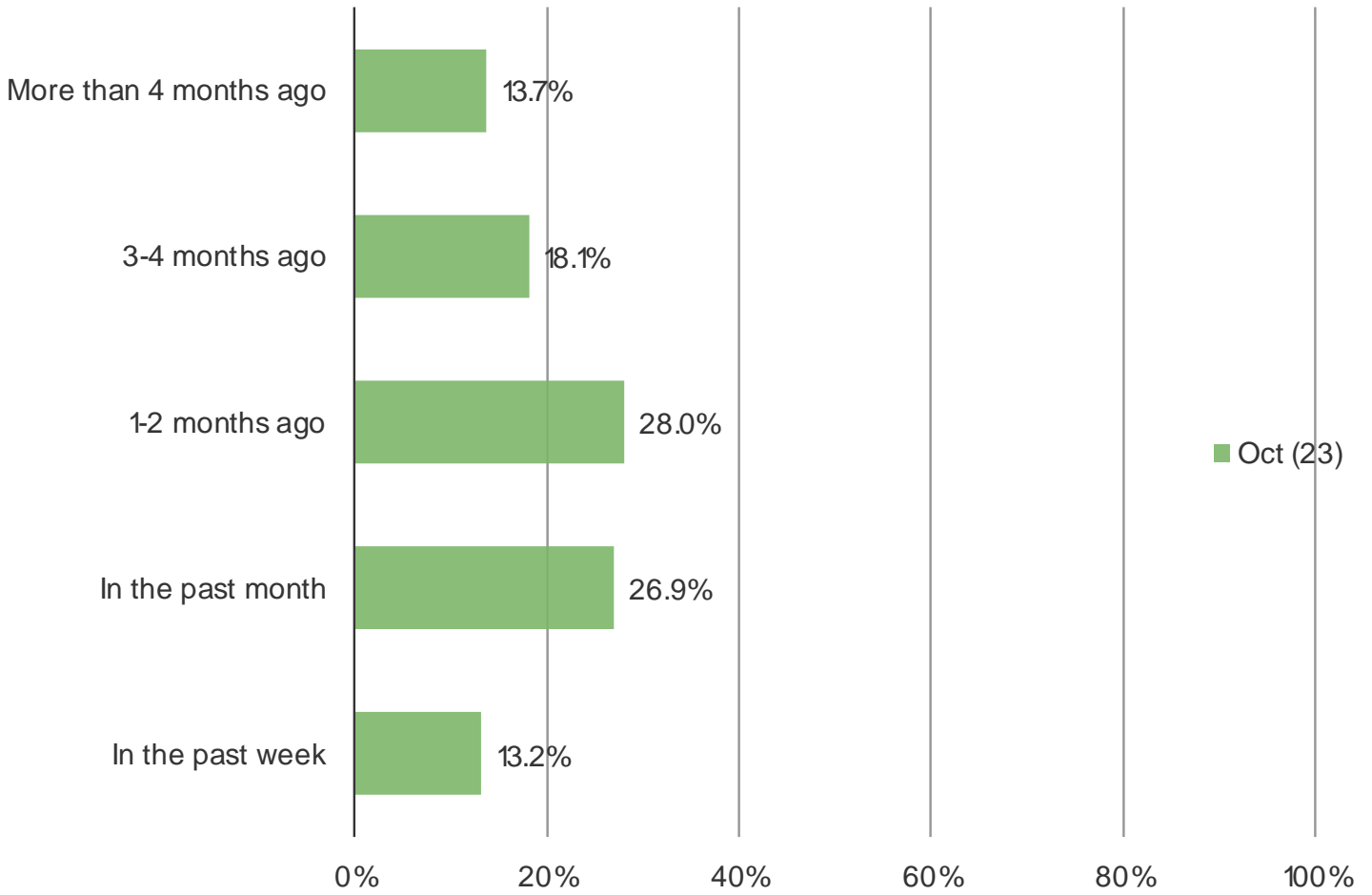
HAVE YOU EVER BEEN FORCED TO ENTER A CODE TO RE-AUTHENTICATE IN THE NETFLIX APP ON ANY DEVICE YOU USE TO WATCH NETFLIX DURING THE PAST 6 MONTHS?(I.E., HAVE YOU BEEN FORCED TO RETRIEVE AND ENTER A CODE SENT TO THE EMAIL ADDRESS OR MOBILE NUMBER ASSOCIATED WITH THE NETFLIX ACCOUNT YOU ACCESS)

Posed to respondents who watch Netflix, cross-tabbed by how they access it...



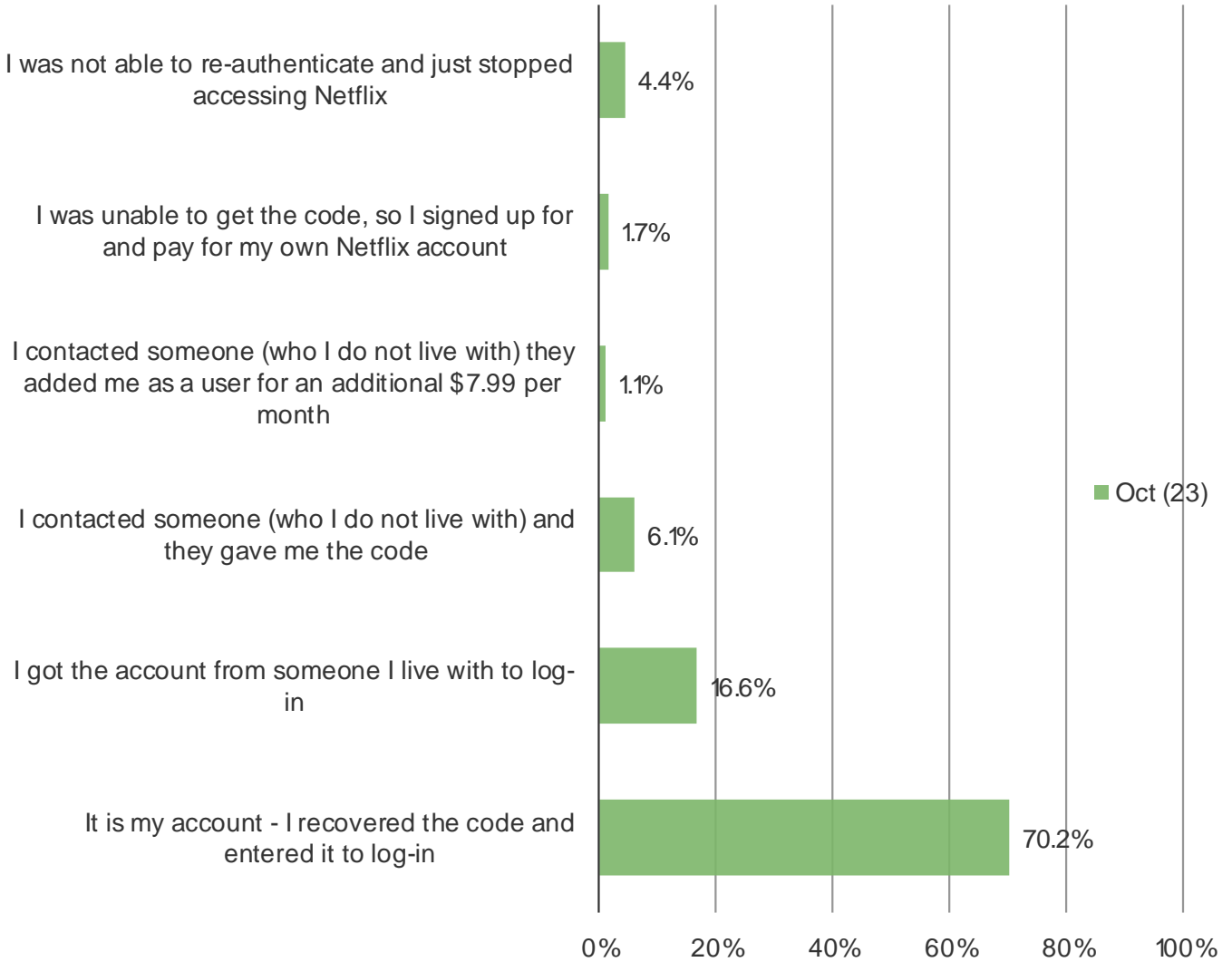
WHEN WERE YOU MOST RECENTLY FORCED TO RE-AUTHENTICATE TO GET INTO NETFLIX?

Posed to respondents who were asked to re-authenticate to access Netflix (N = 149).



WHEN ASKED TO RE-AUTHENTICATE TO GET INTO NETFLIX, WHAT DID YOU DO? PLEASE READ THE BELOW RESPONSES VERY CAREFULLY AND CHOOSE WHICH YOU DID.

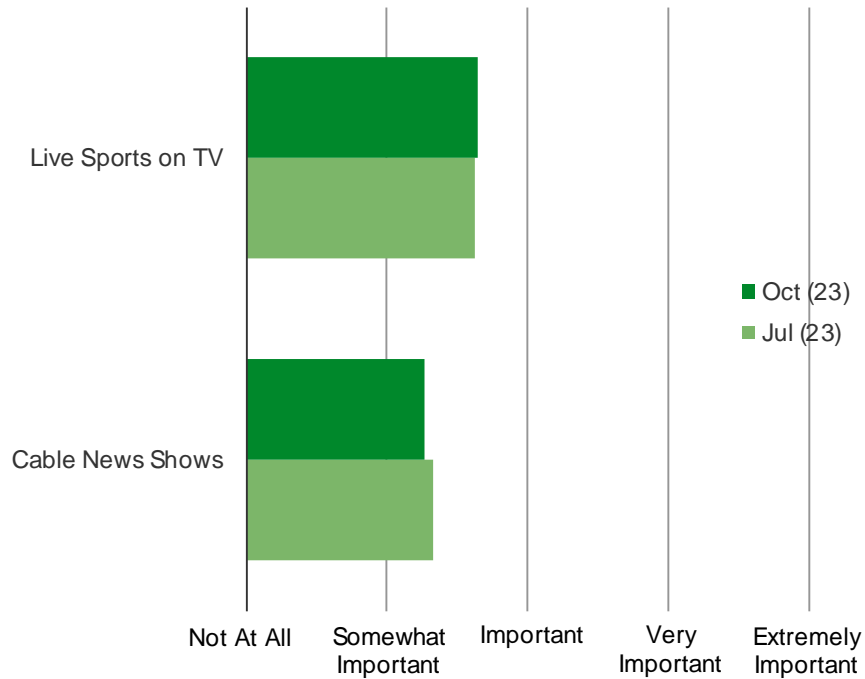
Posed to all respondents who watch movies and/or TV shows through any medium including streaming video providers and were asked to re-authenticate (N = 149).



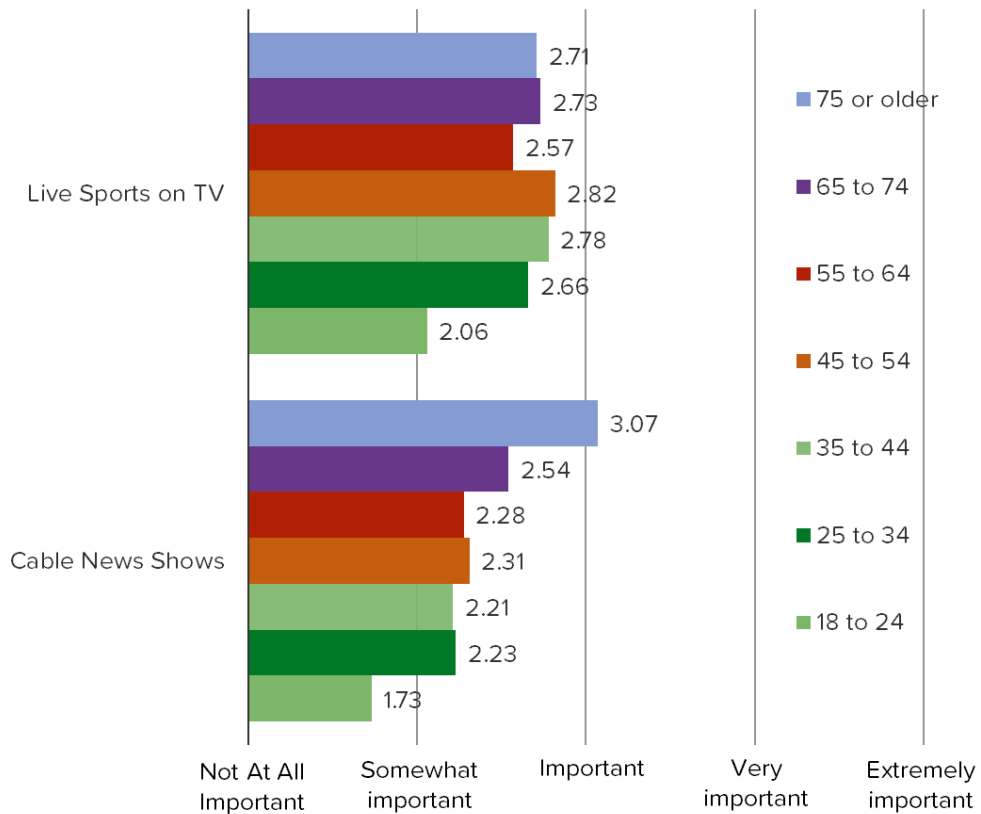
CABLE TV PERSONALITIES AND LIVE SPORTS/EVENTS

HOW IMPORTANT ARE THE FOLLOWING TO YOU...

Posed to all respondents.

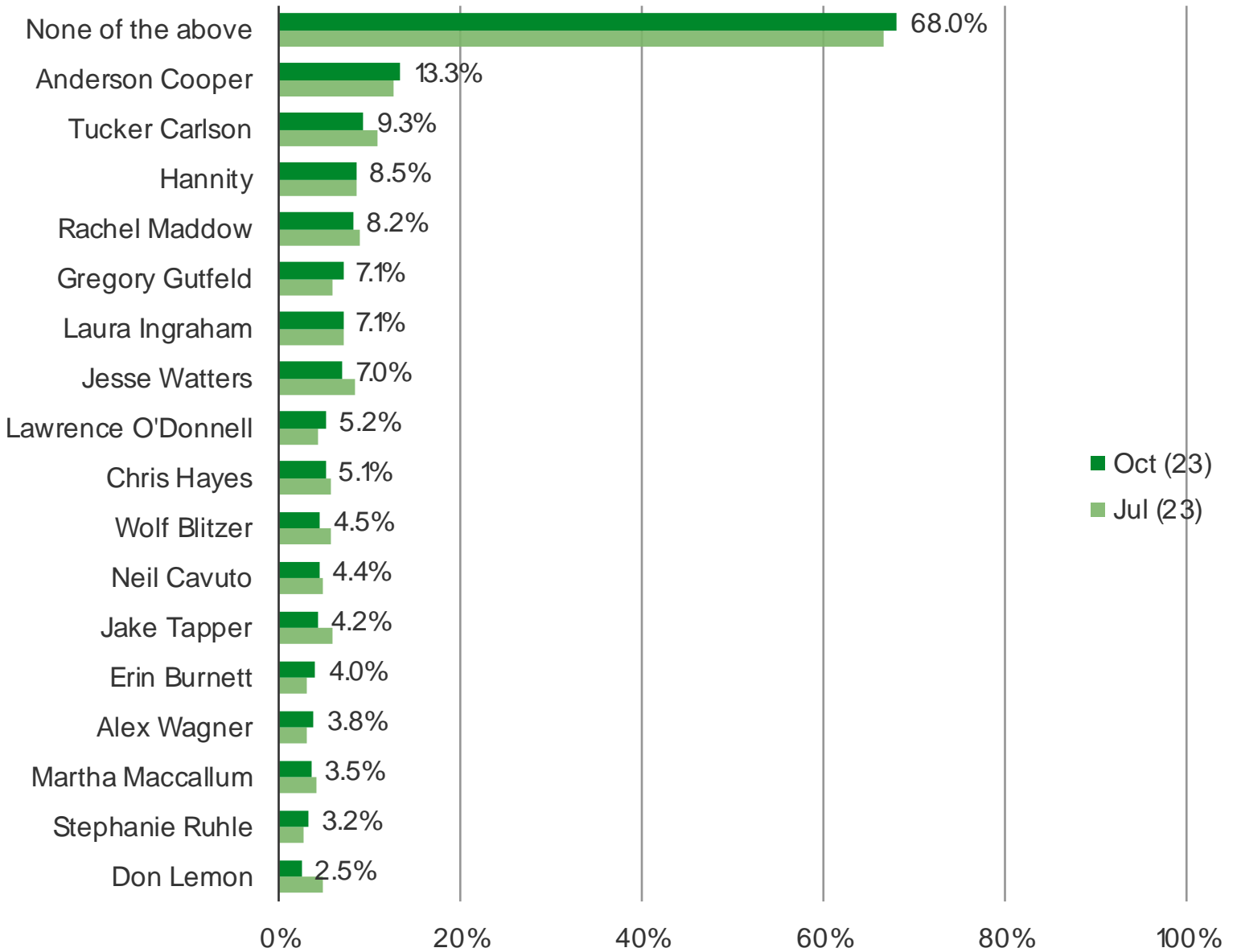


Cross-Tab (Weighted Averages)



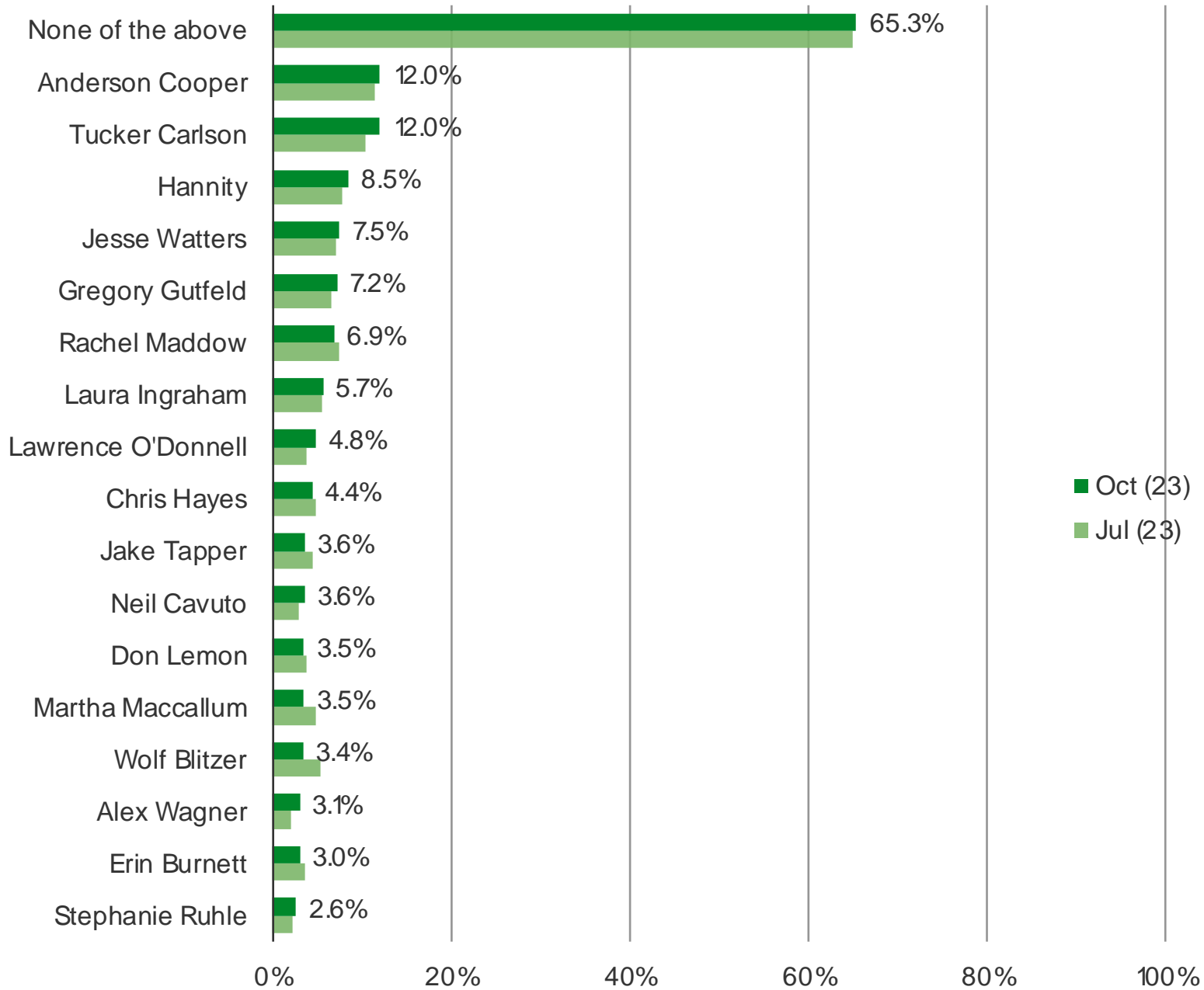
DO YOU WATCH ANY OF THE FOLLOWING REGULARLY? SELECT ALL THAT APPLY

Posed to all respondents.



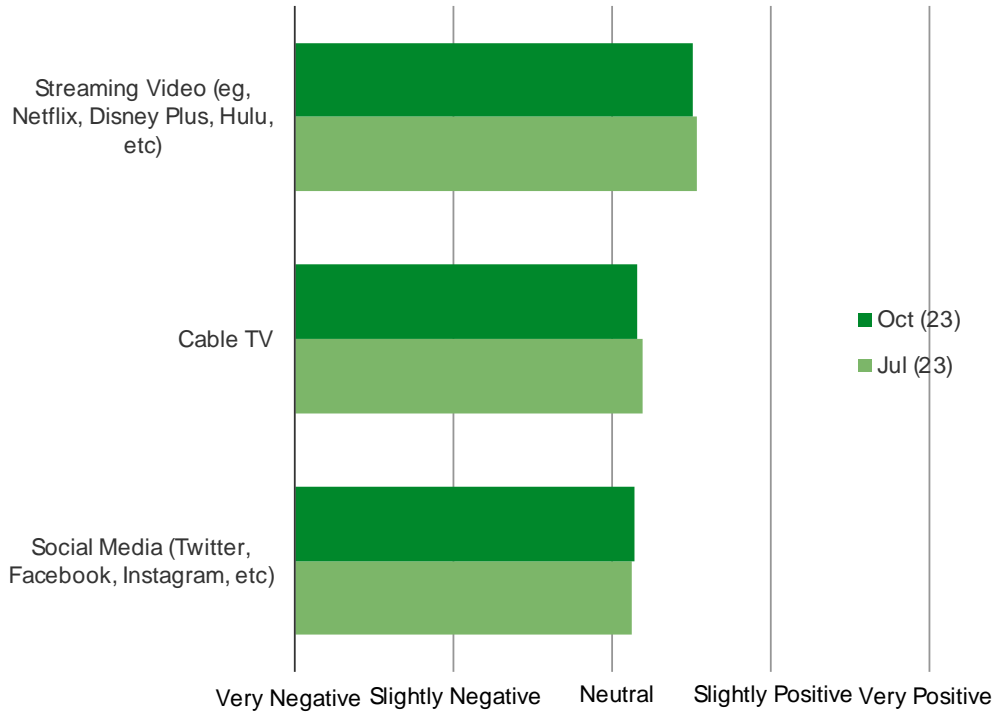
DO YOU CONSIDER YOURSELF A FAN OF ANY OF THE FOLLOWING? SELECT ALL THAT APPLY

Posed to all respondents.

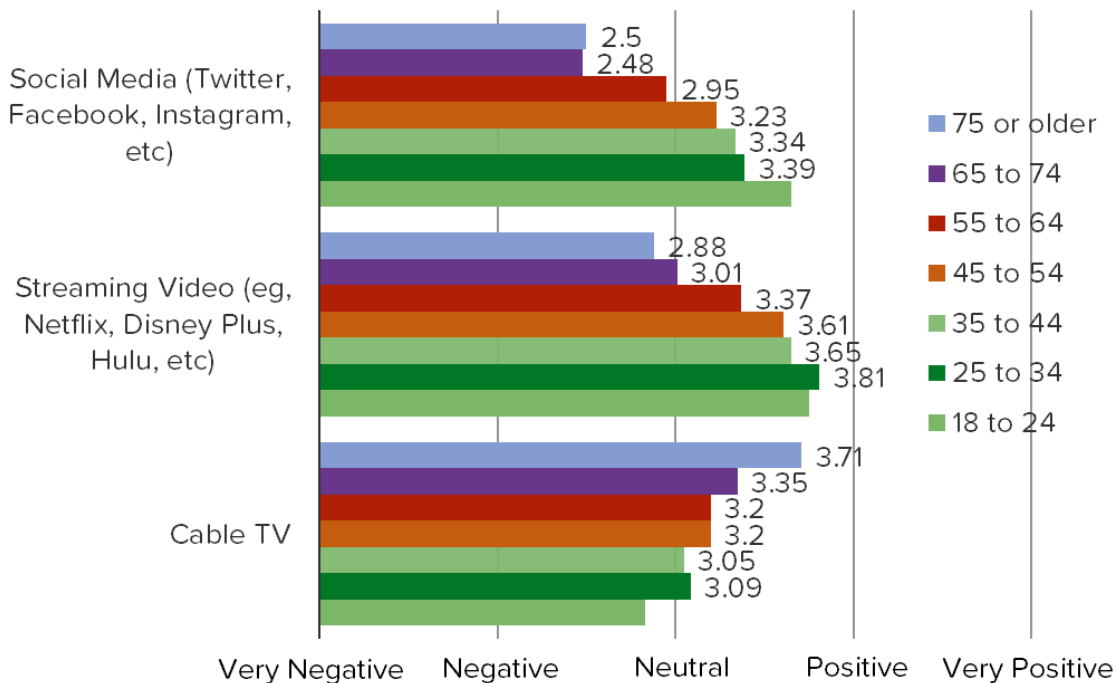


HOW DO YOU FEEL ABOUT WATCHING YOUR FAVORITE CABLE MEDIA PERSONALITIES ON THE FOLLOWING PLATFORMS?

Posed to all respondents.

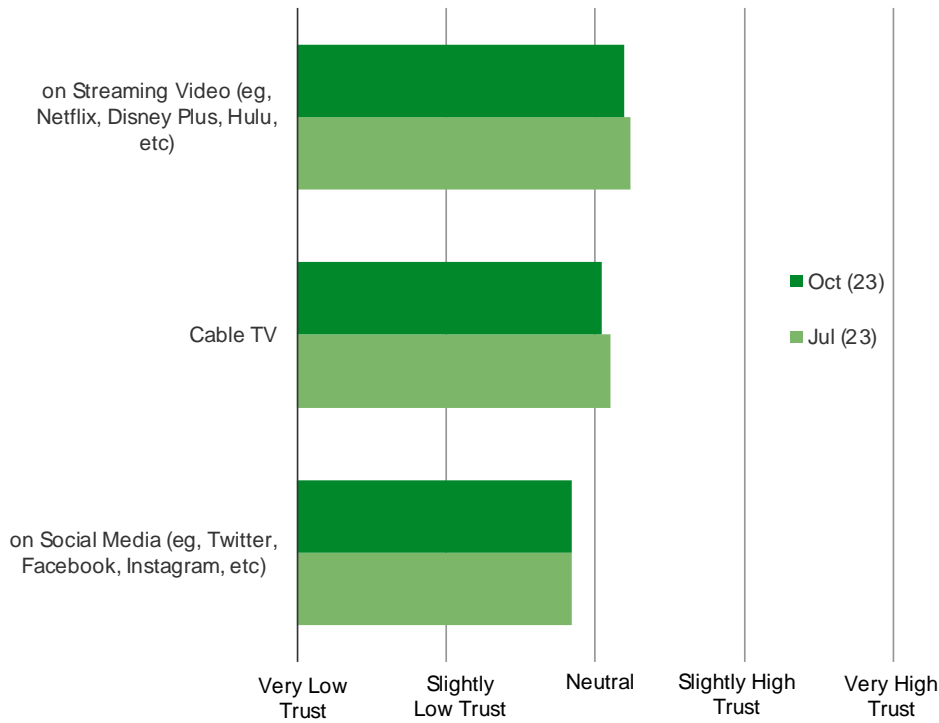


Cross-Tabs (Weighted Averages)

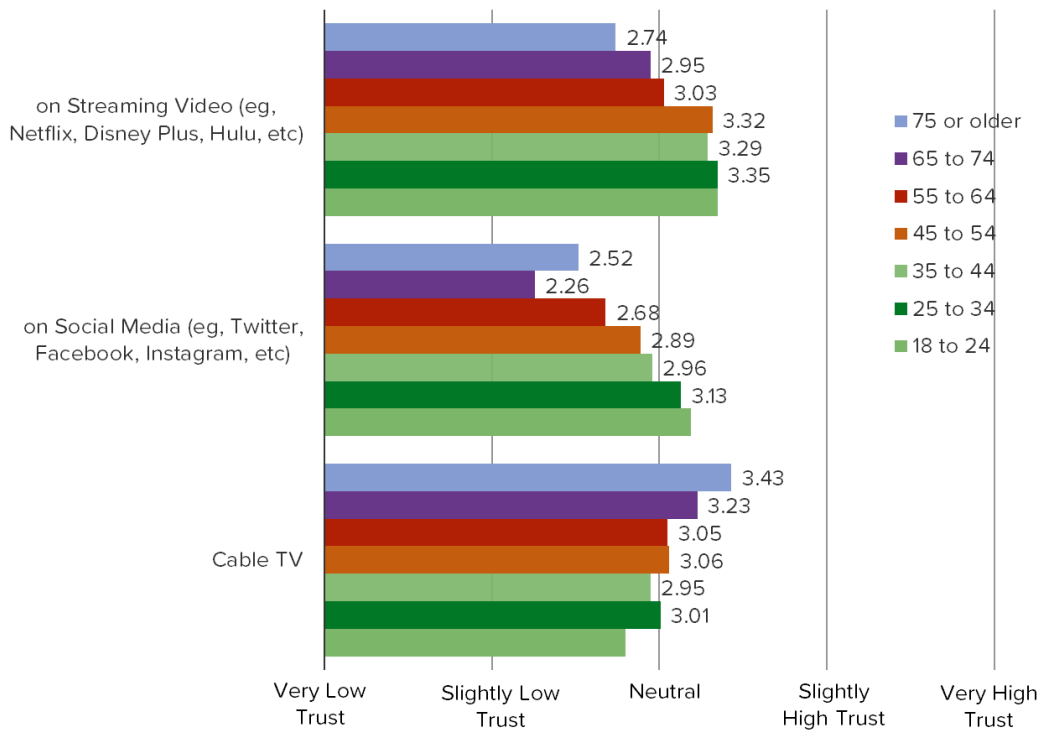


HOW MUCH TRUST DO YOU HAVE IN WATCHING VIDEO OF YOUR FAVORITE CABLE NEWS PERSONALITIES IN THE FOLLOWING FORUMS...

Posed to all respondents.

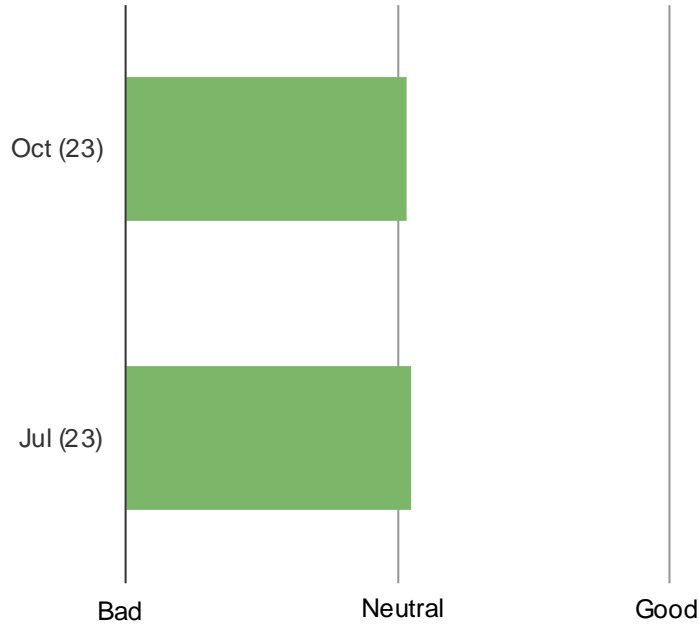


Cross-Tabs (Weighted Averages)

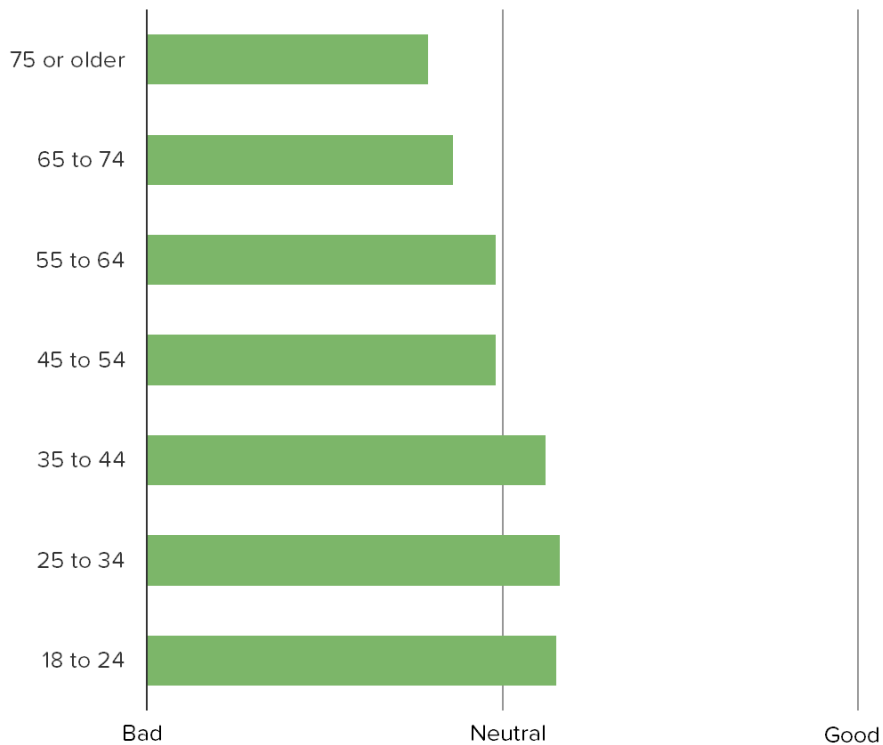


WOULD YOU CONSIDER IT A GOOD OR BAD THING IF YOUR FAVORITE CABLE NEWS PERSONALITY LEFT THE NETWORK AND SPOKE DIRECTLY TO THE AUDIENCE FROM THEIR OWN SOCIAL MEDIA PLATFORM (LIKE TWITTER)?

Posed to all respondents.



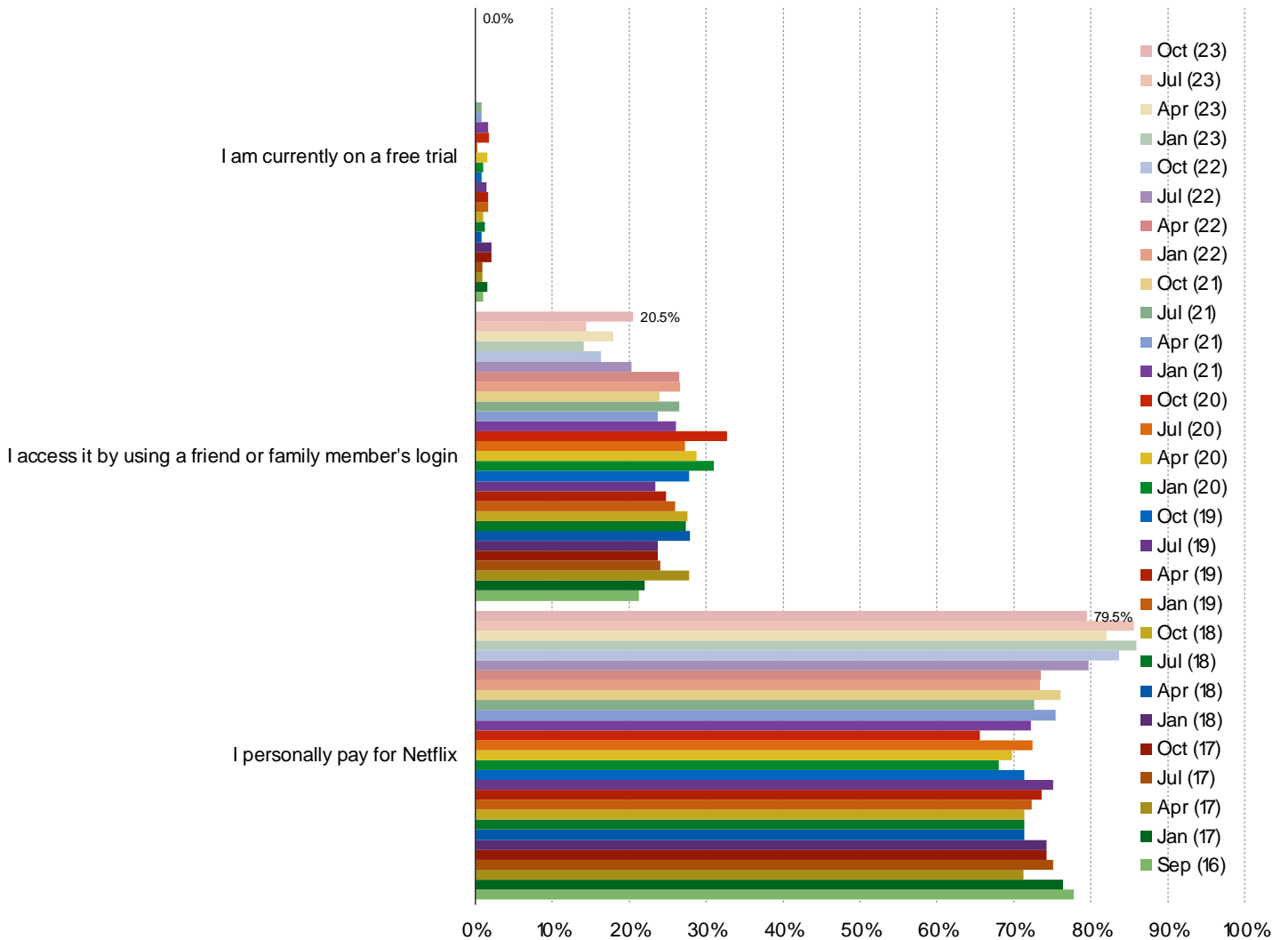
Cross-Tabs (Weighted Averages)



NFLX ACCOUNT SHARING

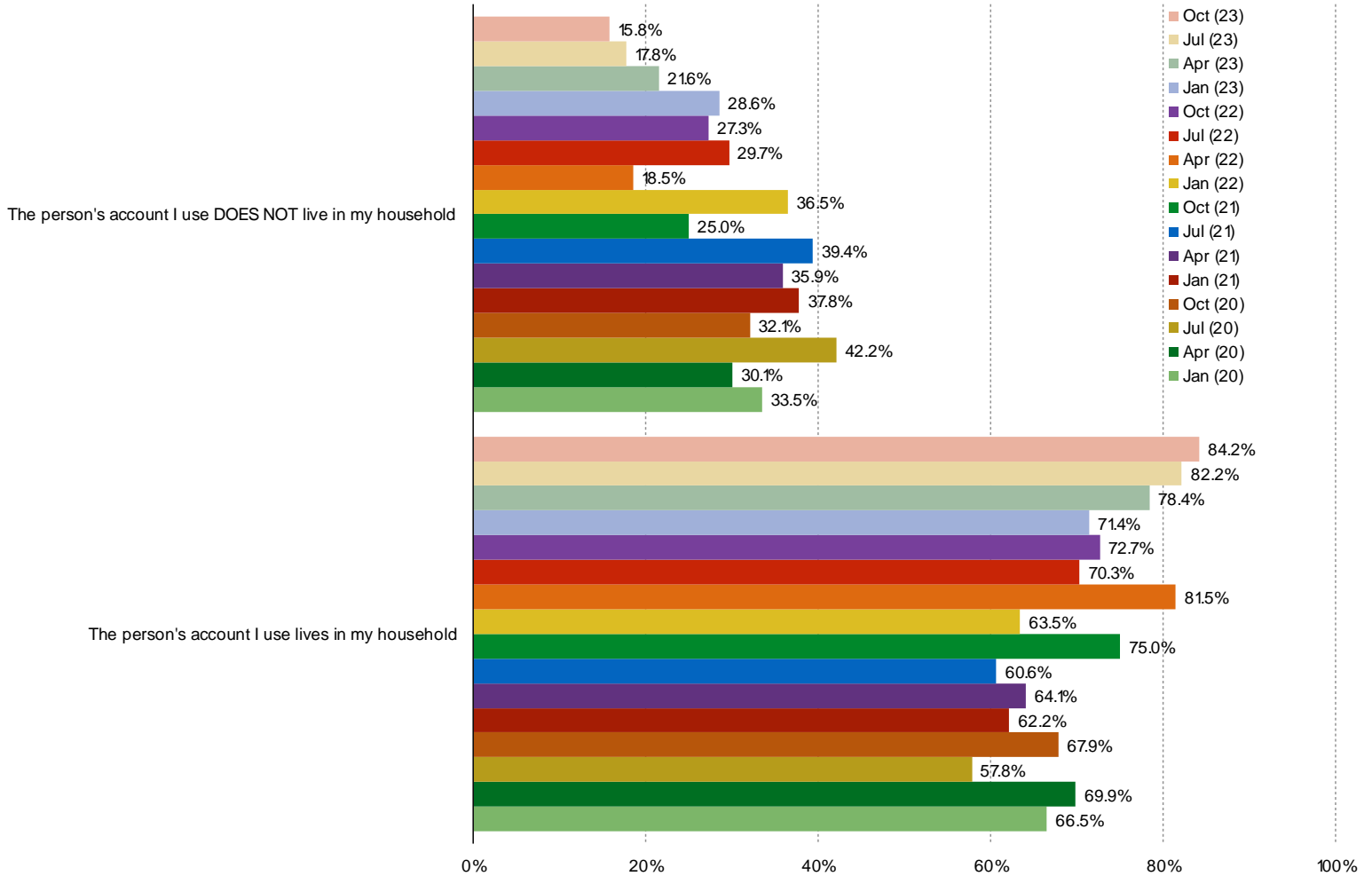
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

Posed to Netflix subscribers.



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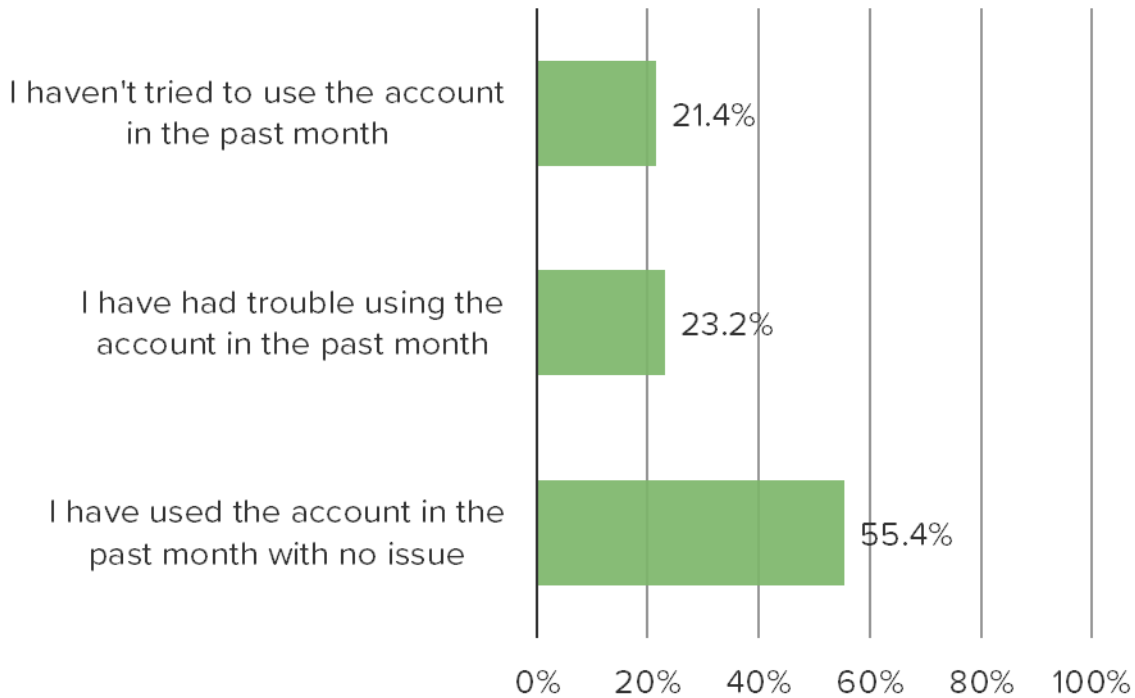
Posed to Netflix subscribers who access it by using a family or friend’s login (31% of subscribers).



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

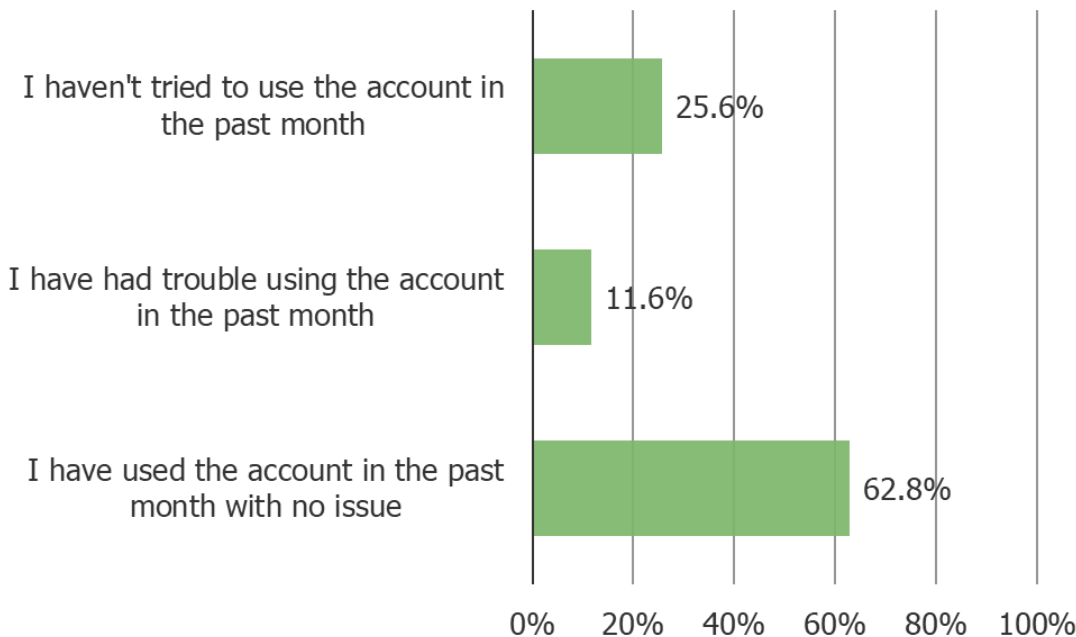
Posed to respondents who said they access someone else's account who they do not live with (N = 56)

OCTOBER 2023



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

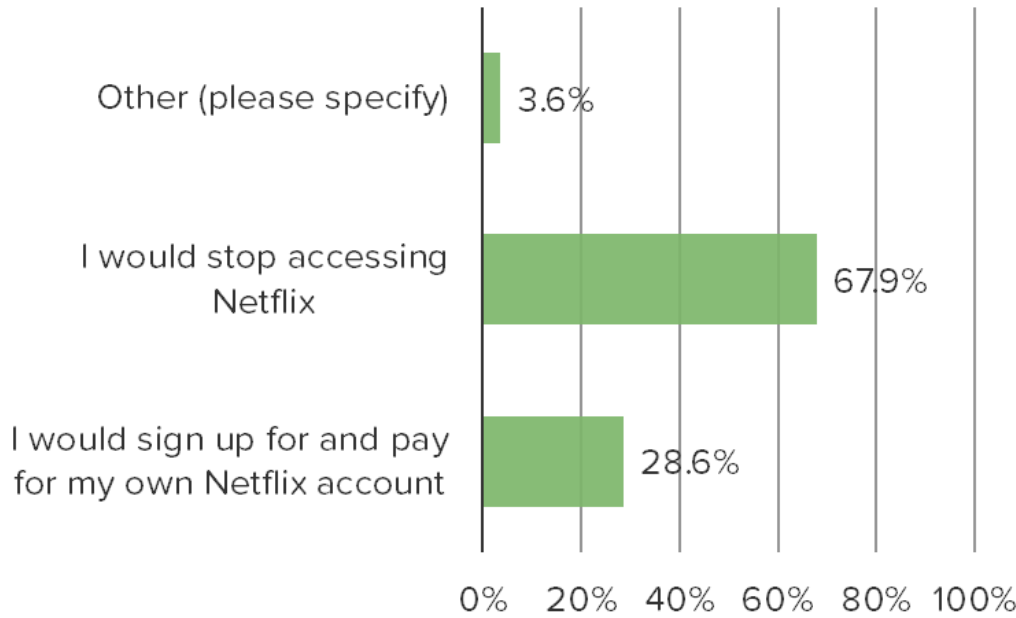
JULY 2023



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

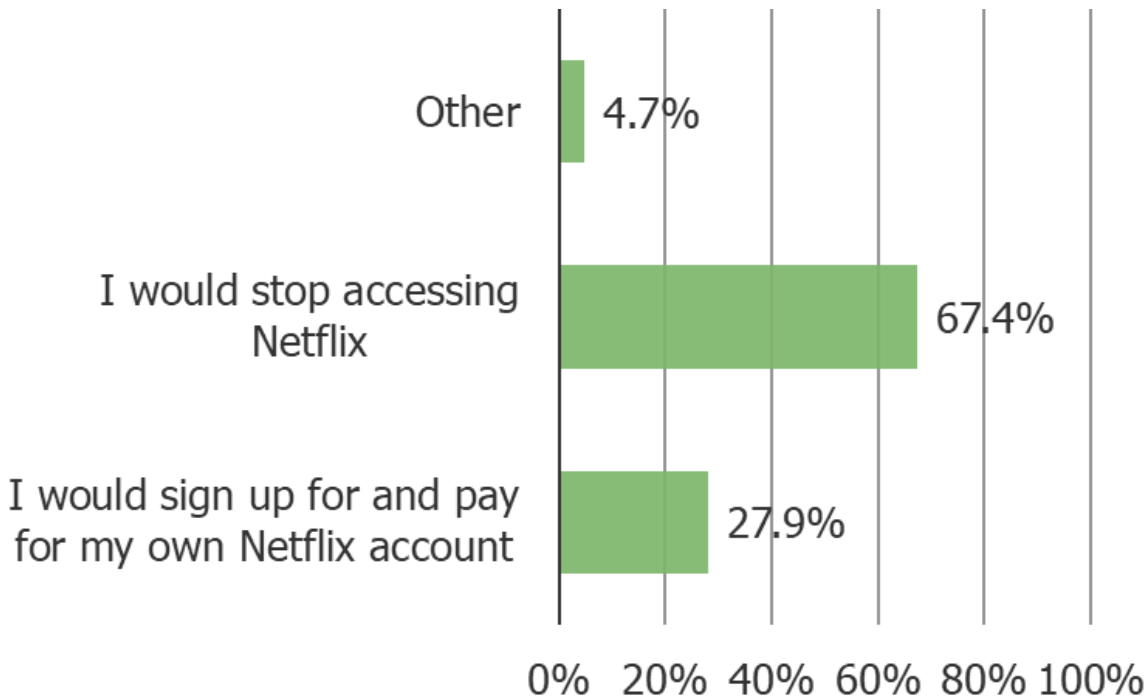
Posed to respondents who said they access someone else's account who they do not live with (N = 56)

OCTOBER 2023



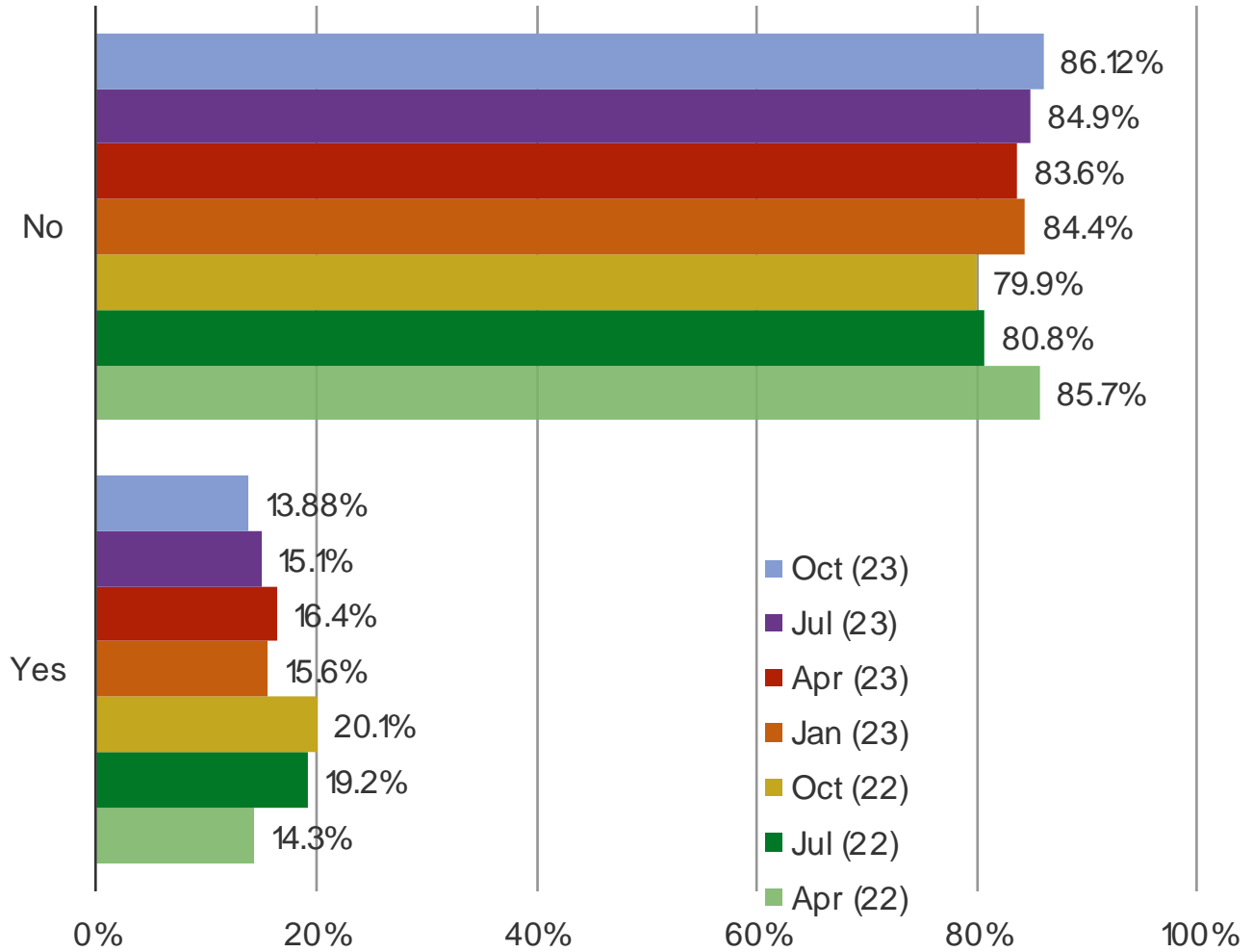
Posed to respondents who said they access someone else's account who they do not live with (N = 43)

JULY 2023



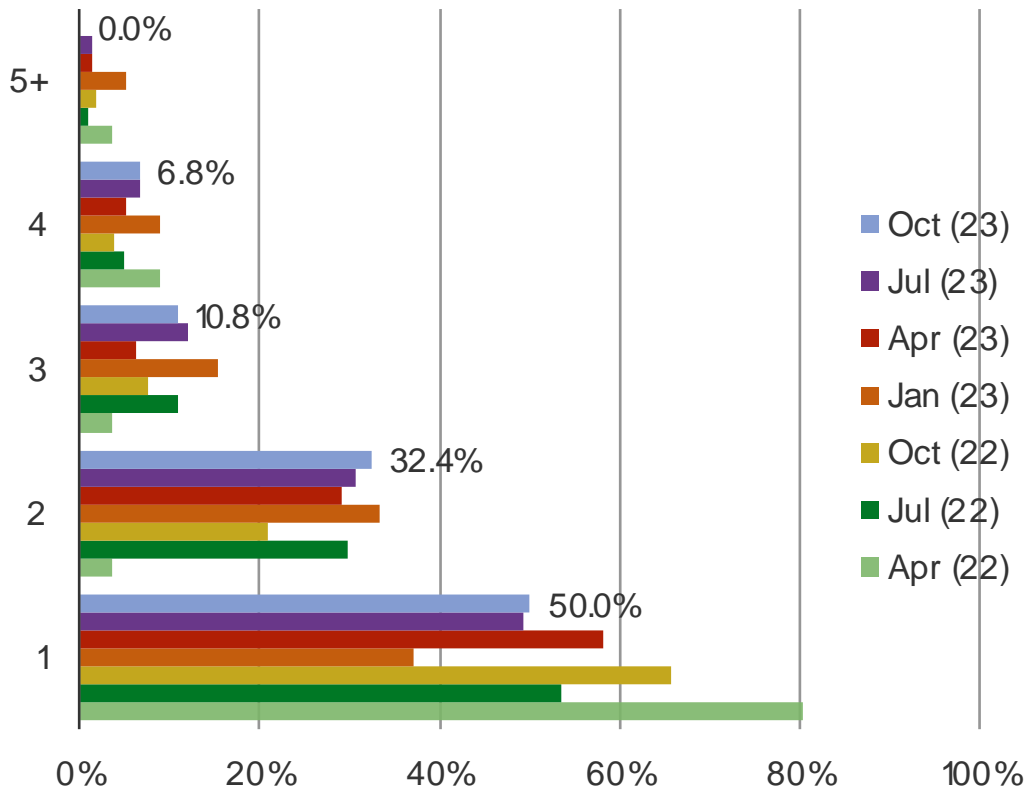
DO YOU LET ANYONE LIVING OUTSIDE OF YOUR HOUSEHOLD USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix or lives with someone who pays for Netflix (N=533).



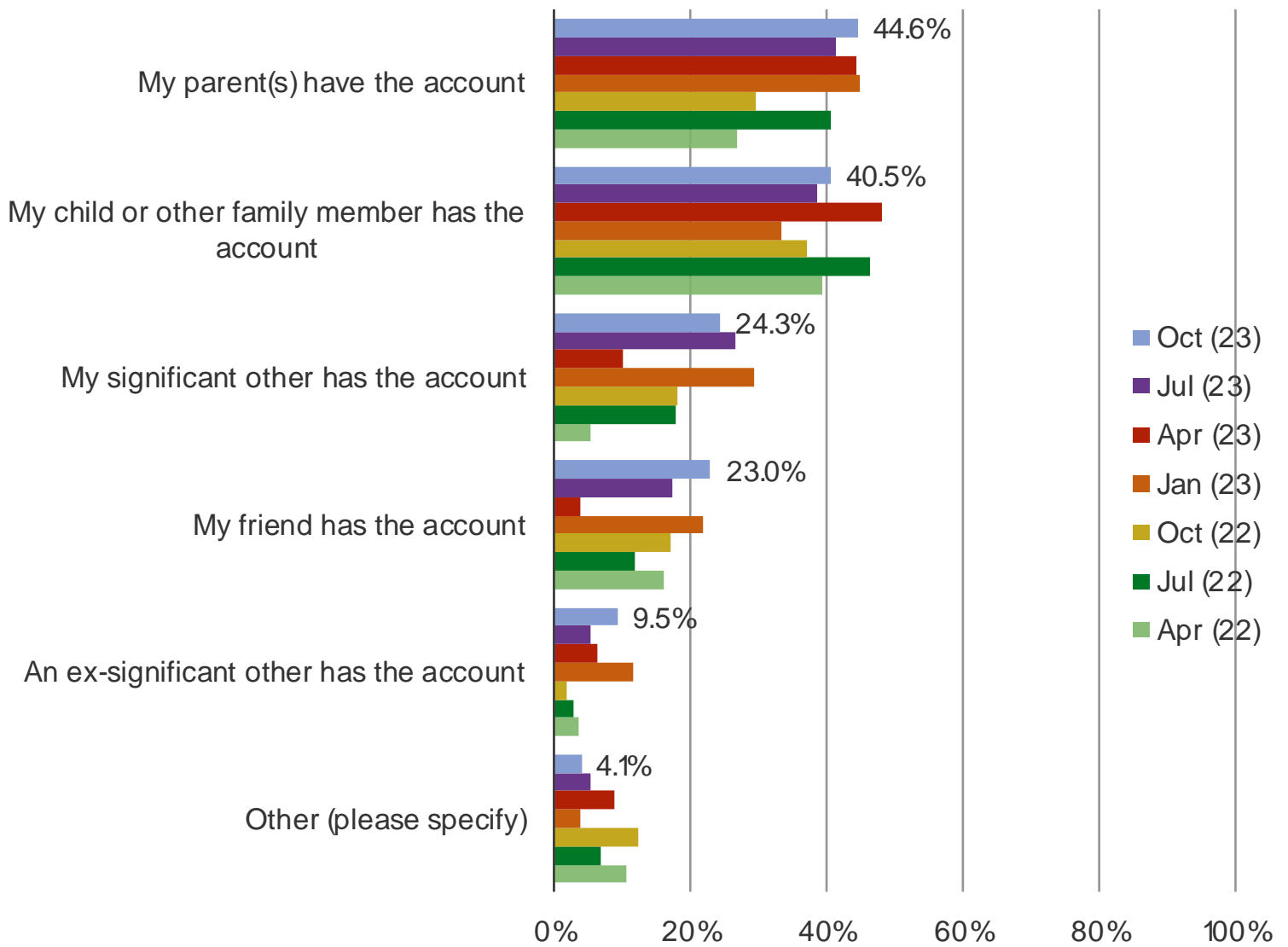
HOW MANY PEOPLE WHO LIVE OUTSIDE OF YOUR HOUSEHOLD DO YOU LET USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 74)



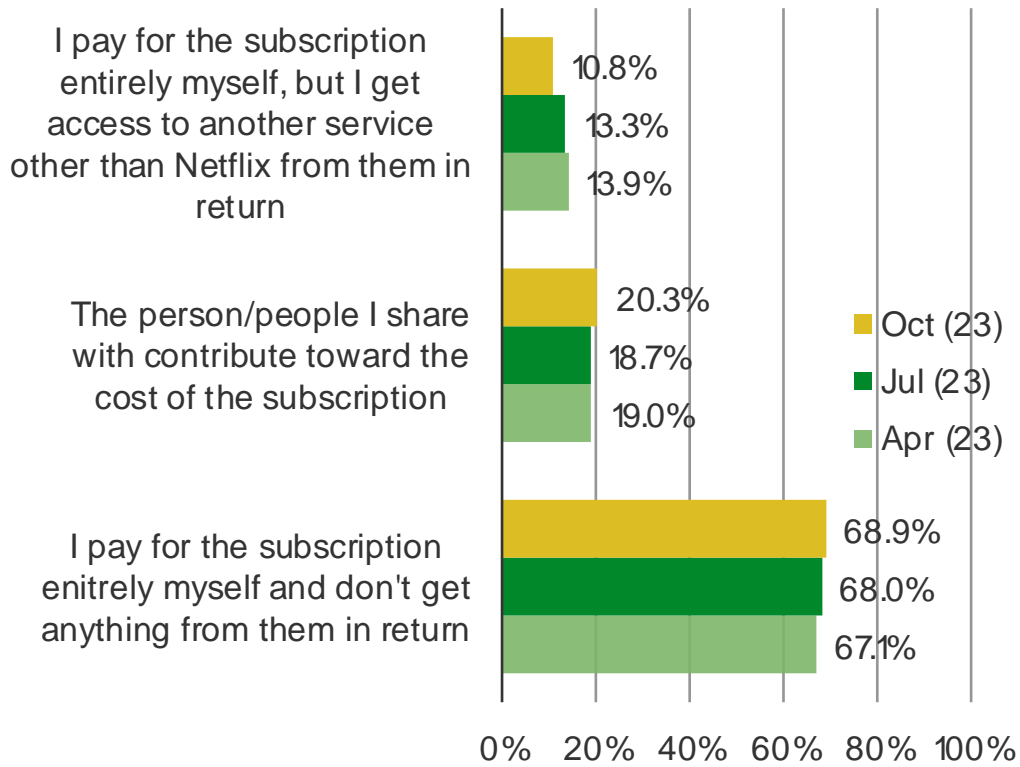
WHAT IS YOUR RELATION TO THE PERSON WHOSE NETFLIX ACCOUNT YOU ACCESS?

Posed to respondents who access someone’s Netflix account who they do not live with (N = 74).



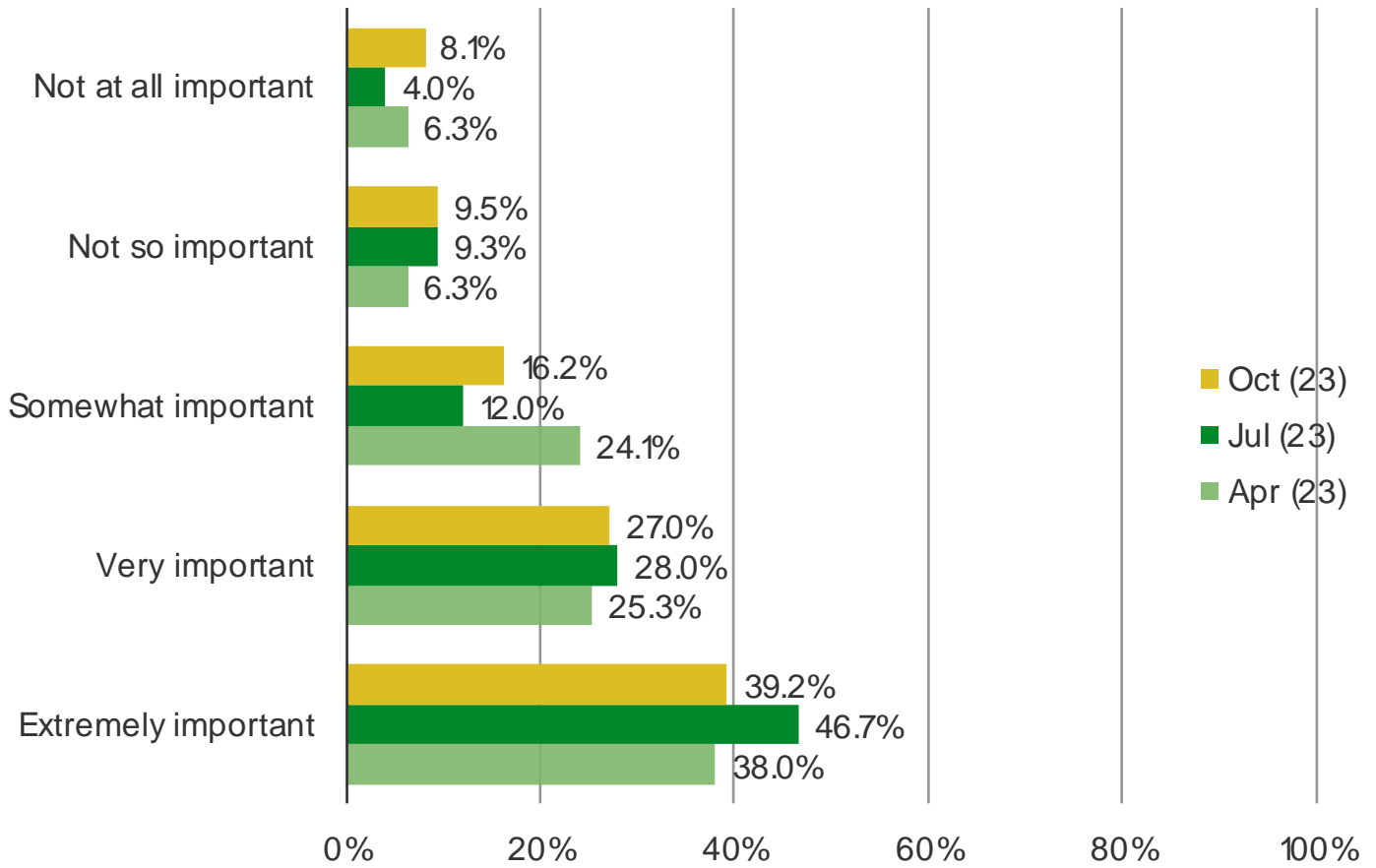
THINKING OF THE PERSON/PEOPLE YOU SHARE YOUR ACCOUNT WITH, WHO PAYS FOR THE SUBSCRIPTION?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=74)



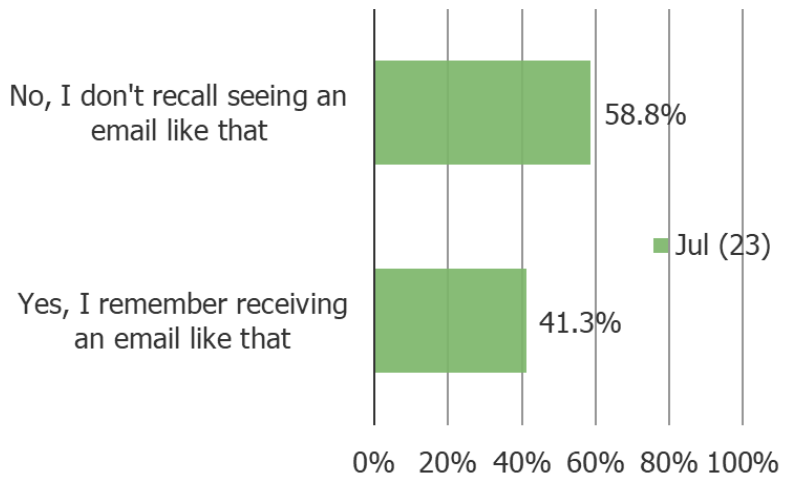
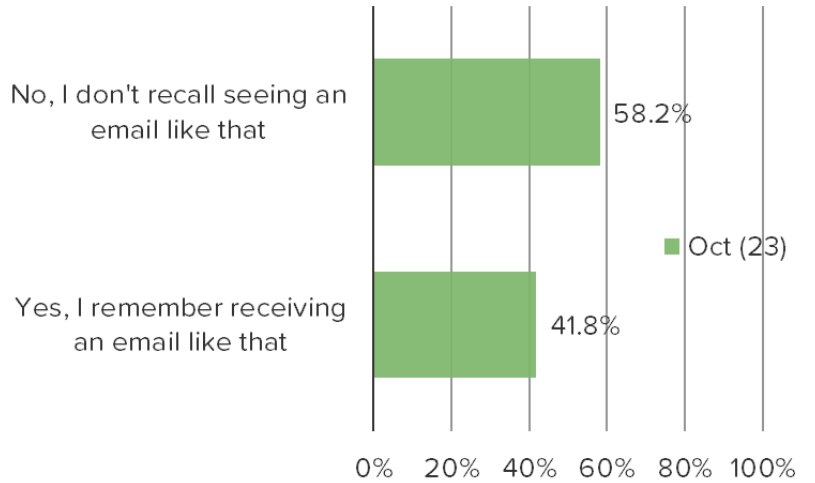
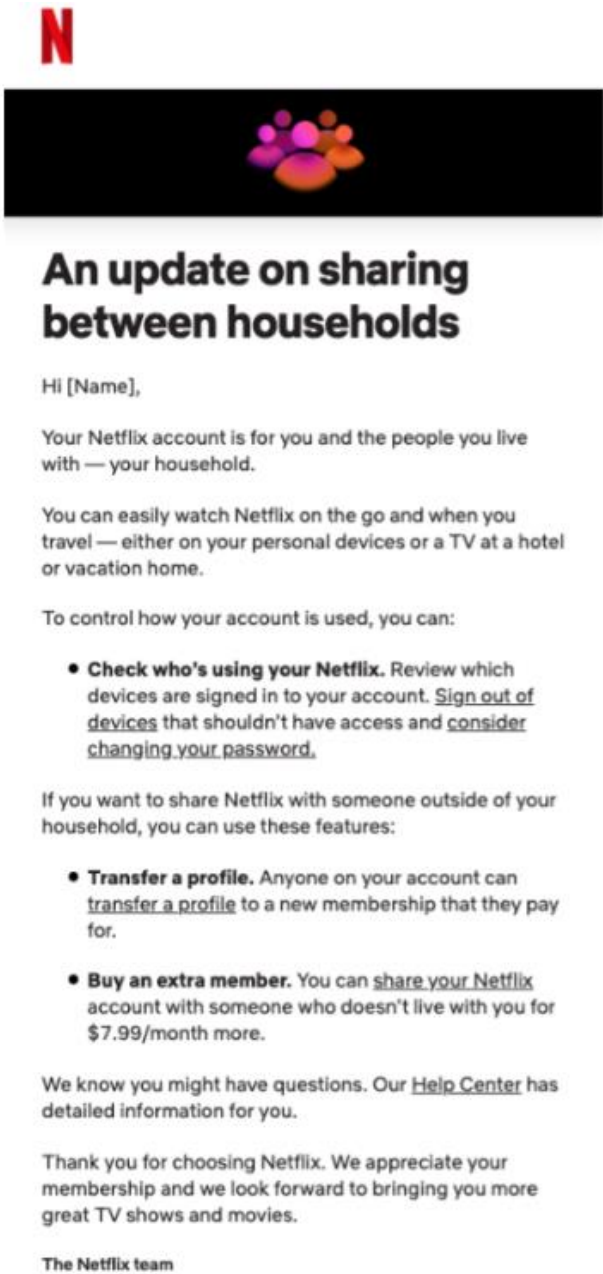
HOW IMPORTANT IS IT TO YOU TO BE ABLE TO SHARE YOUR NETFLIX ACCOUNT WITH PEOPLE WHO LIVE OUTSIDE OF YOUR HOME?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=74)



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

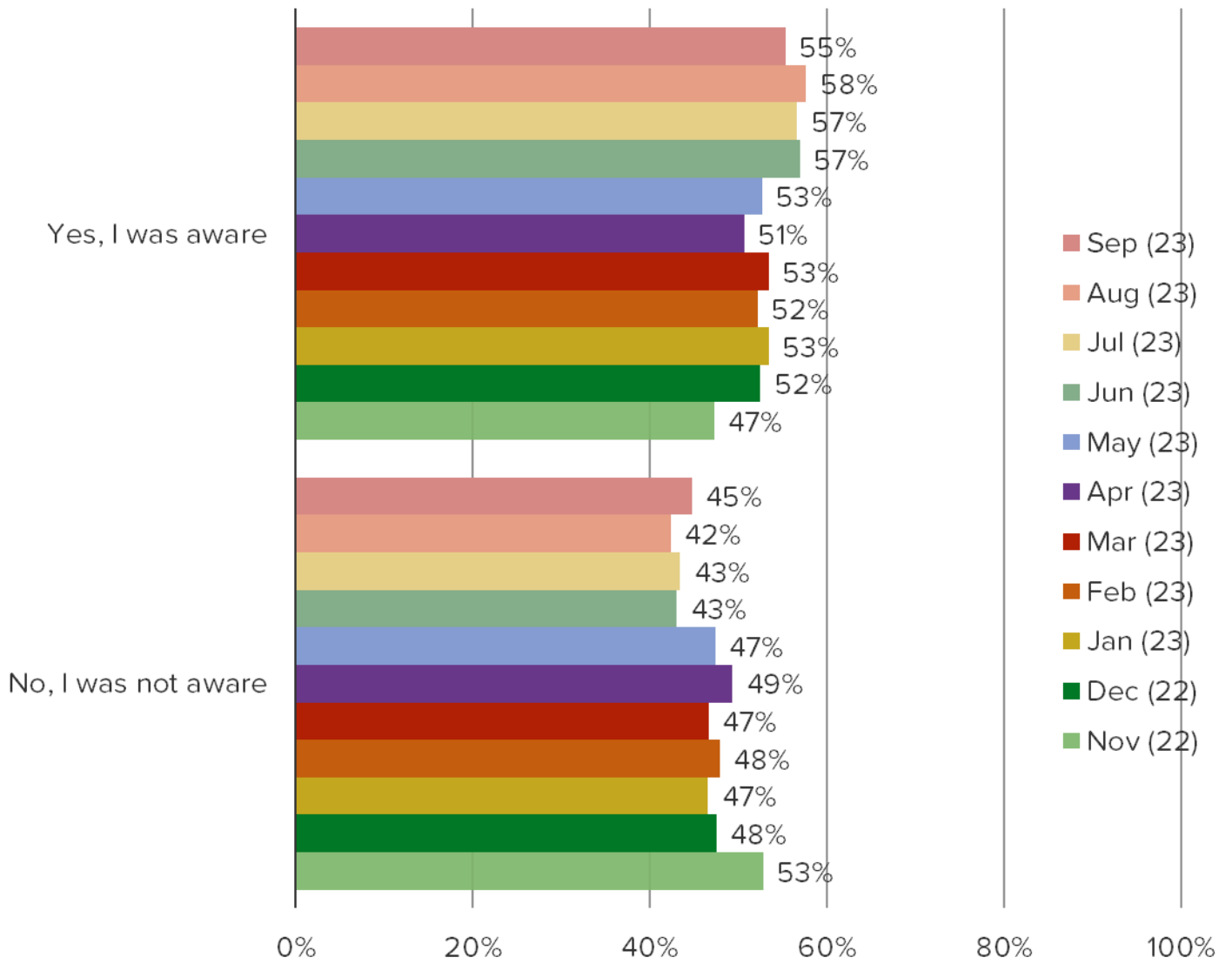
Posed to paying Netflix subscribers (N = 499)



STANDARD WITH ADS

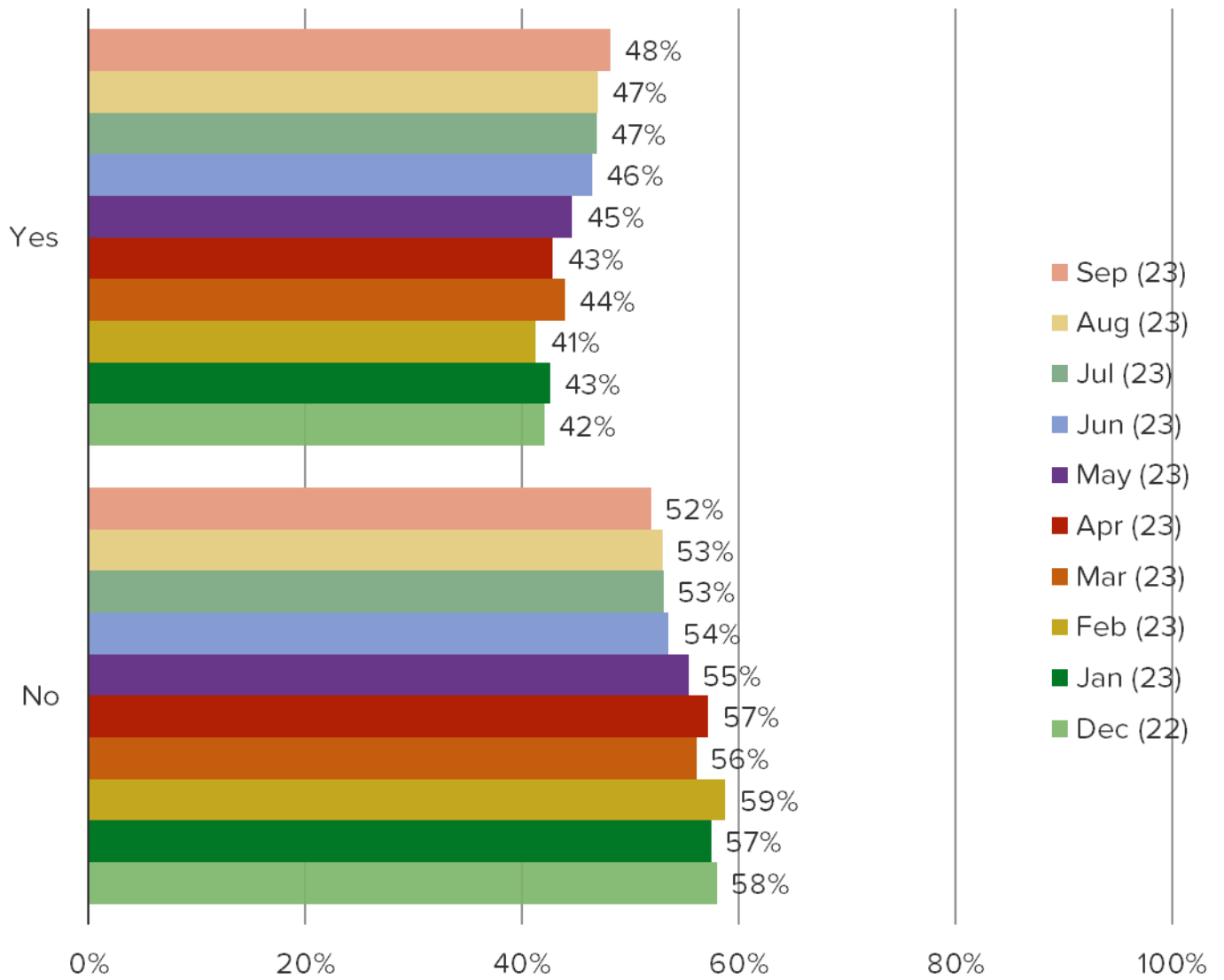
BEFORE TAKING THIS SURVEY, WERE YOU AWARE THAT NETFLIX HAS AN AD-SUPPORTED TIER WITH COMMERCIALS?

Posed to all respondents.



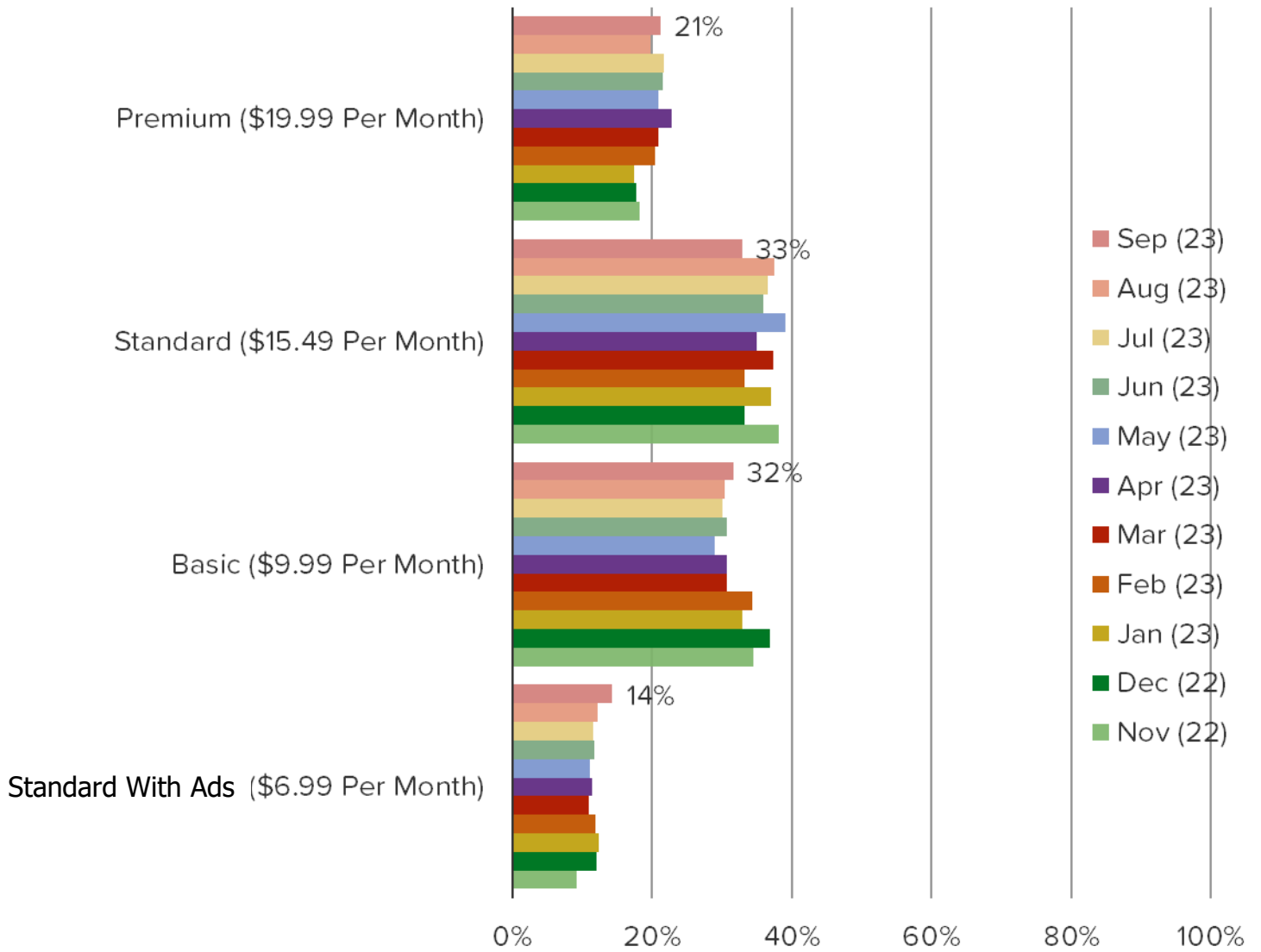
BEFORE TAKING THIS SURVEY, WERE YOU AWARE THAT DISNEY+ HAS AN AD-SUPPORTED TIER WITH COMMERCIALS?

Posed to all respondents.



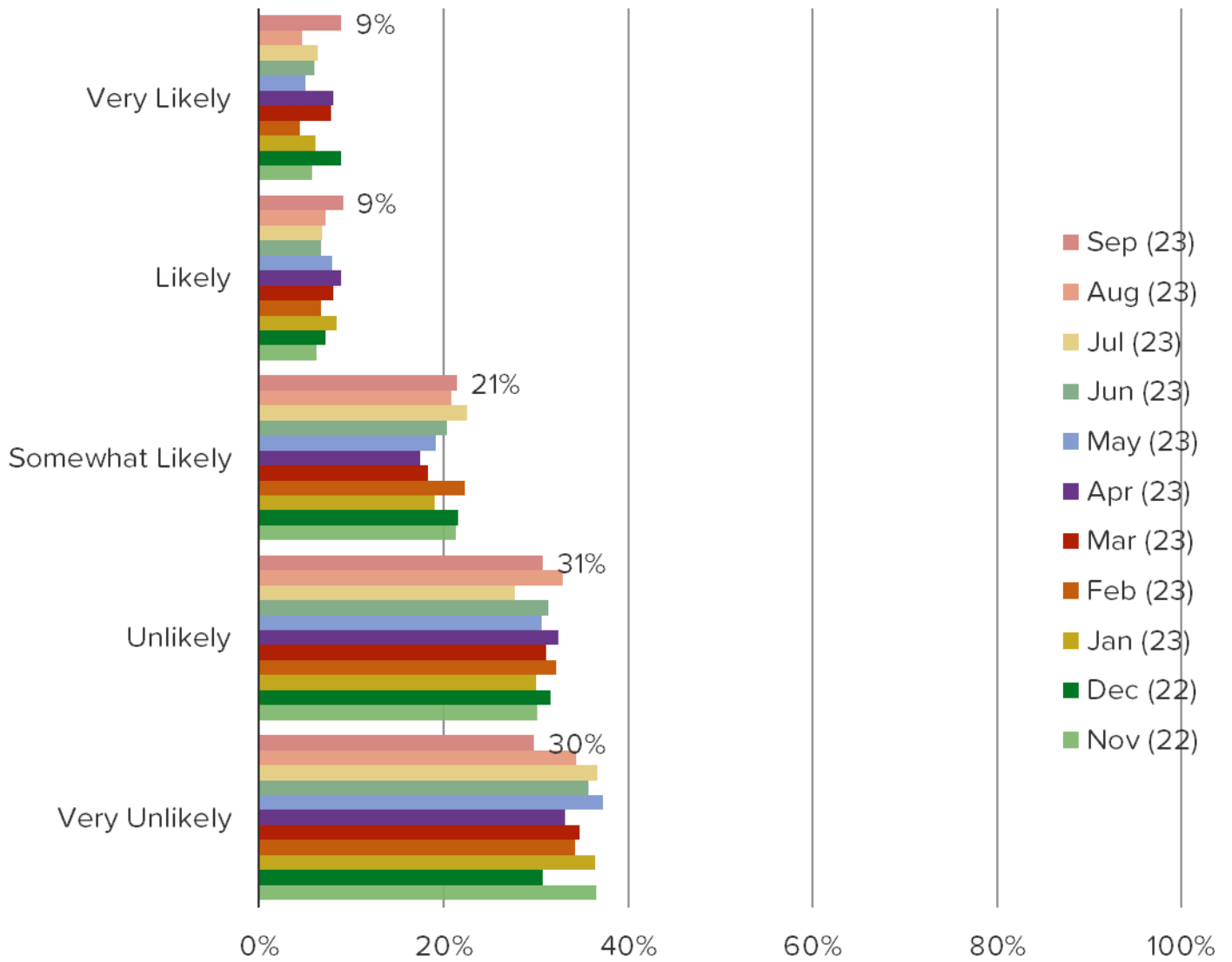
WHICH OF THE FOLLOWING MOST ACCURATELY DESCRIBES YOUR NETFLIX SUBSCRIPTION?

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?

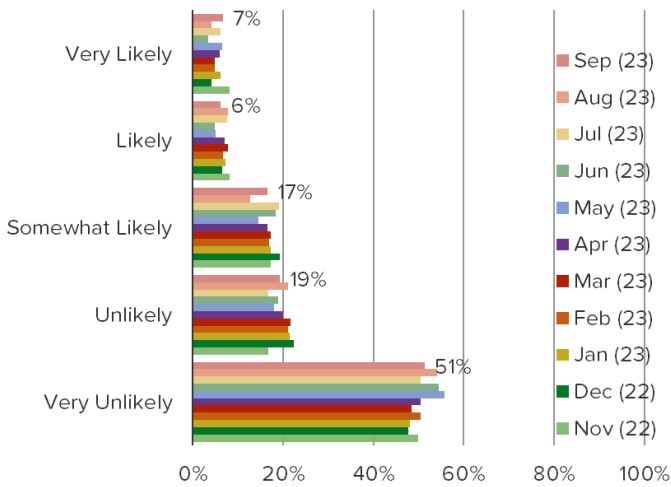
Posed to all respondents who are Netflix subscribers but are not on the ad supported plan.



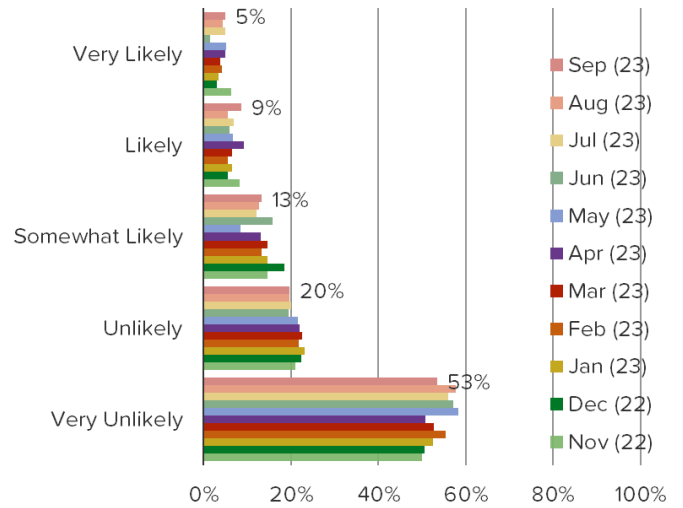
HOW LIKELY ARE YOU TO SIGN UP FOR THE FOLLOWING NETFLIX PLANS IN THE NEXT MONTH?

Posed to all respondents who are not currently Netflix subscribers.

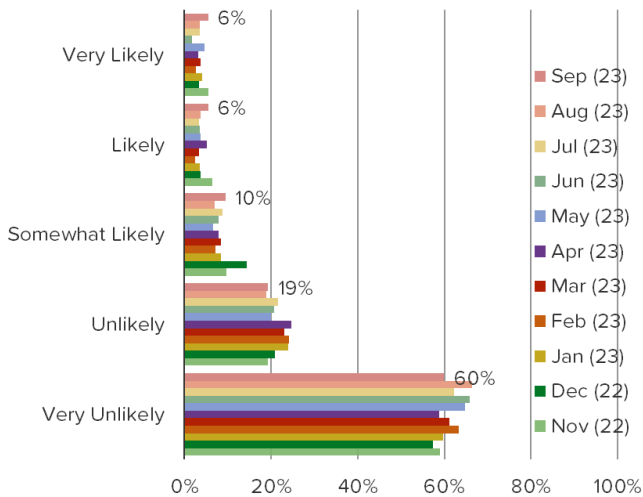
Standard with Ads



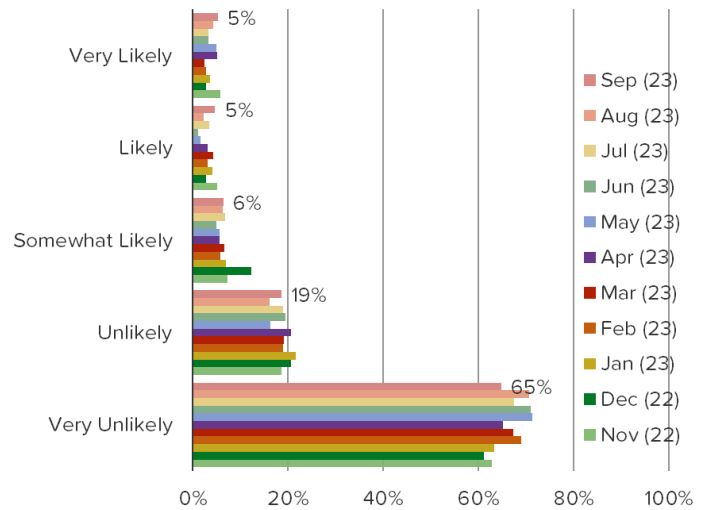
Basic



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

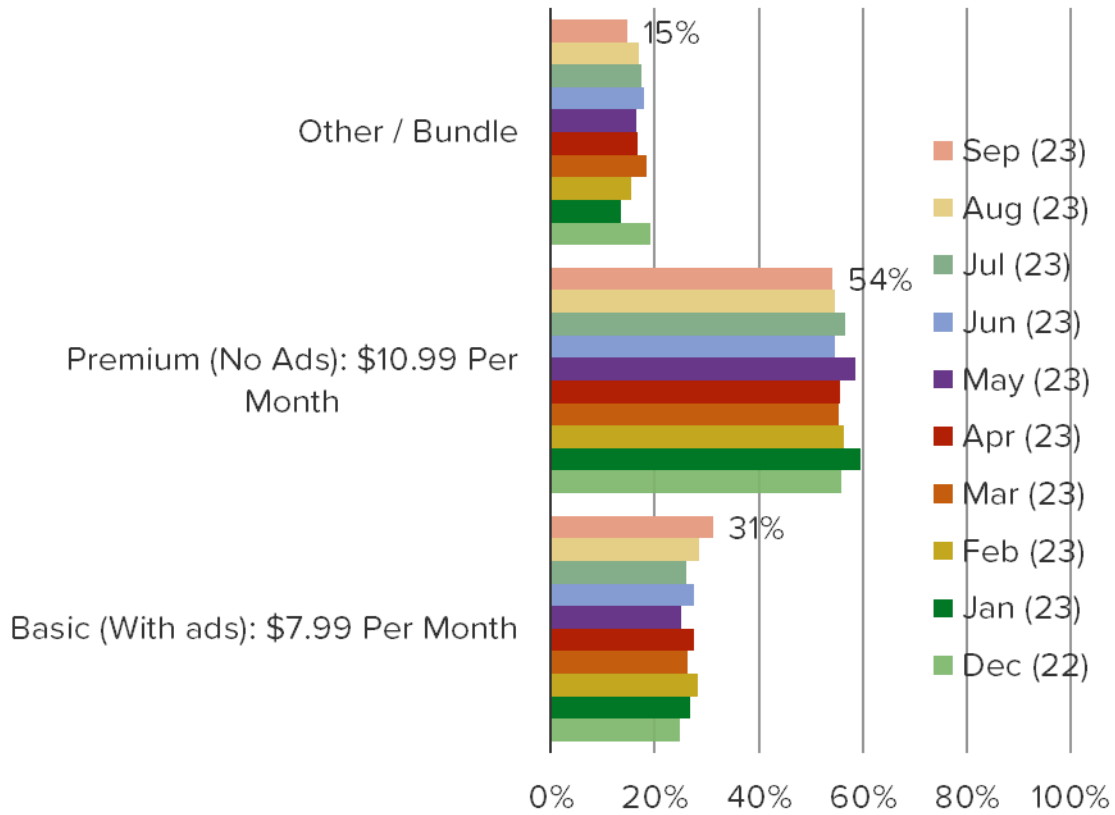
- They don't like ads
- They are content with what they have now
- Netflix is their main streaming service / they watch Netflix so much that they don't watch ads.

Why they WOULD switch to Basic with Ads

- It would be cheaper
- Money is tight right now

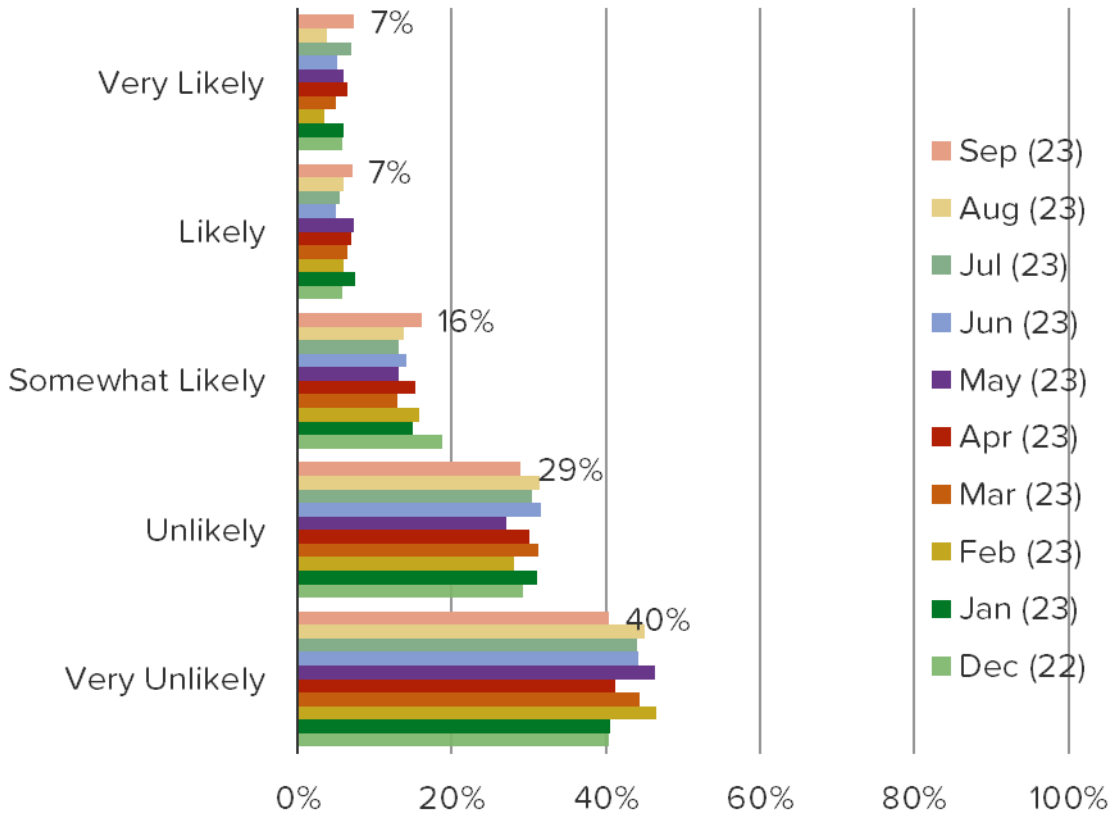
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR DISNEY+ SUBSCRIPTION?

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.

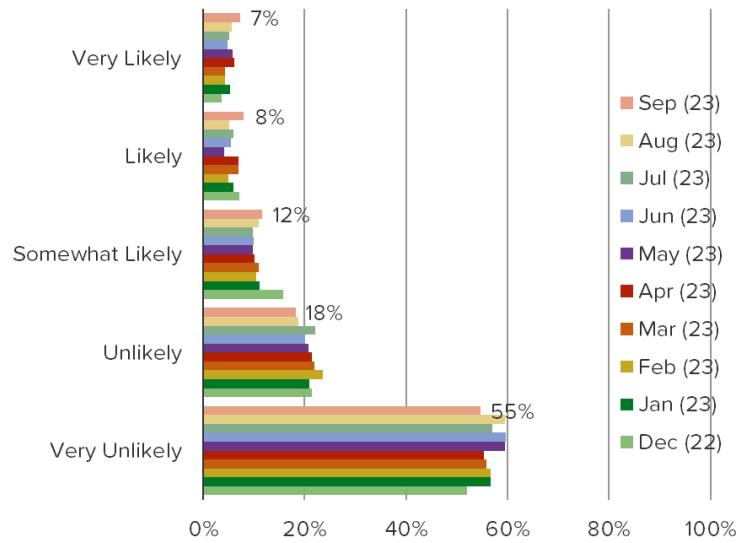
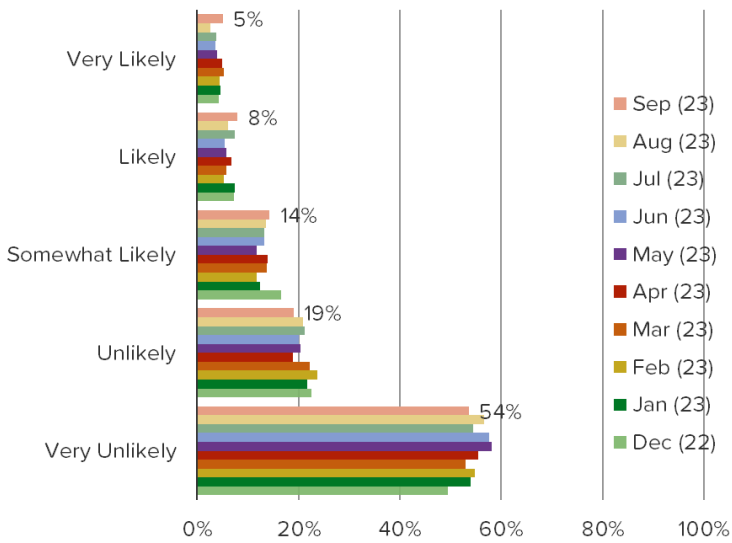


HOW LIKELY ARE YOU TO SIGN UP FOR THE FOLLOWING DISNEY+ PLANS IN THE NEXT MONTH?

Posed to respondents who are not currently Disney+ subscribers.

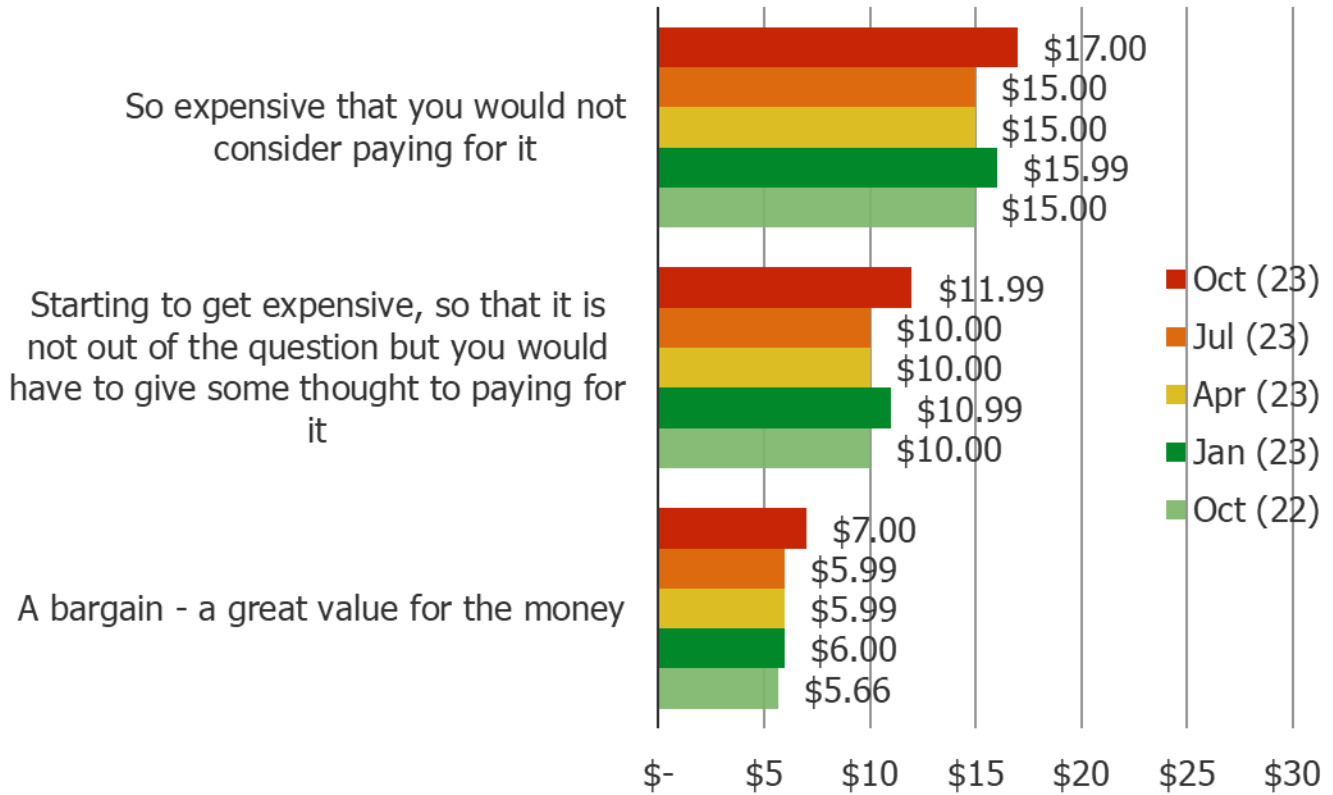
Basic (With ads): \$7.99 Per Month

Premium (No Ads): \$10.99 Per Month



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

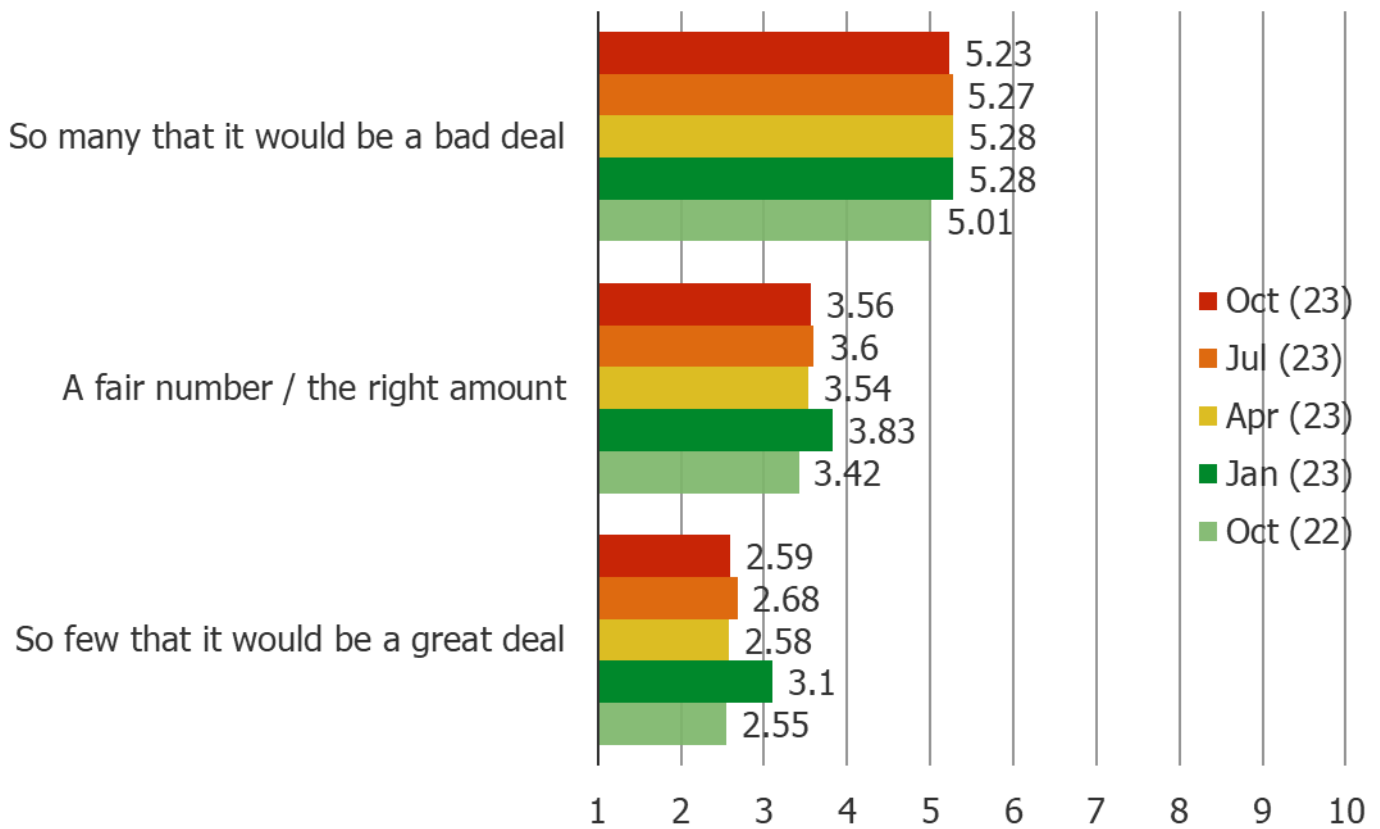
Posed to respondents who watch movies and/or TV shows at home (N = 846)



*Median

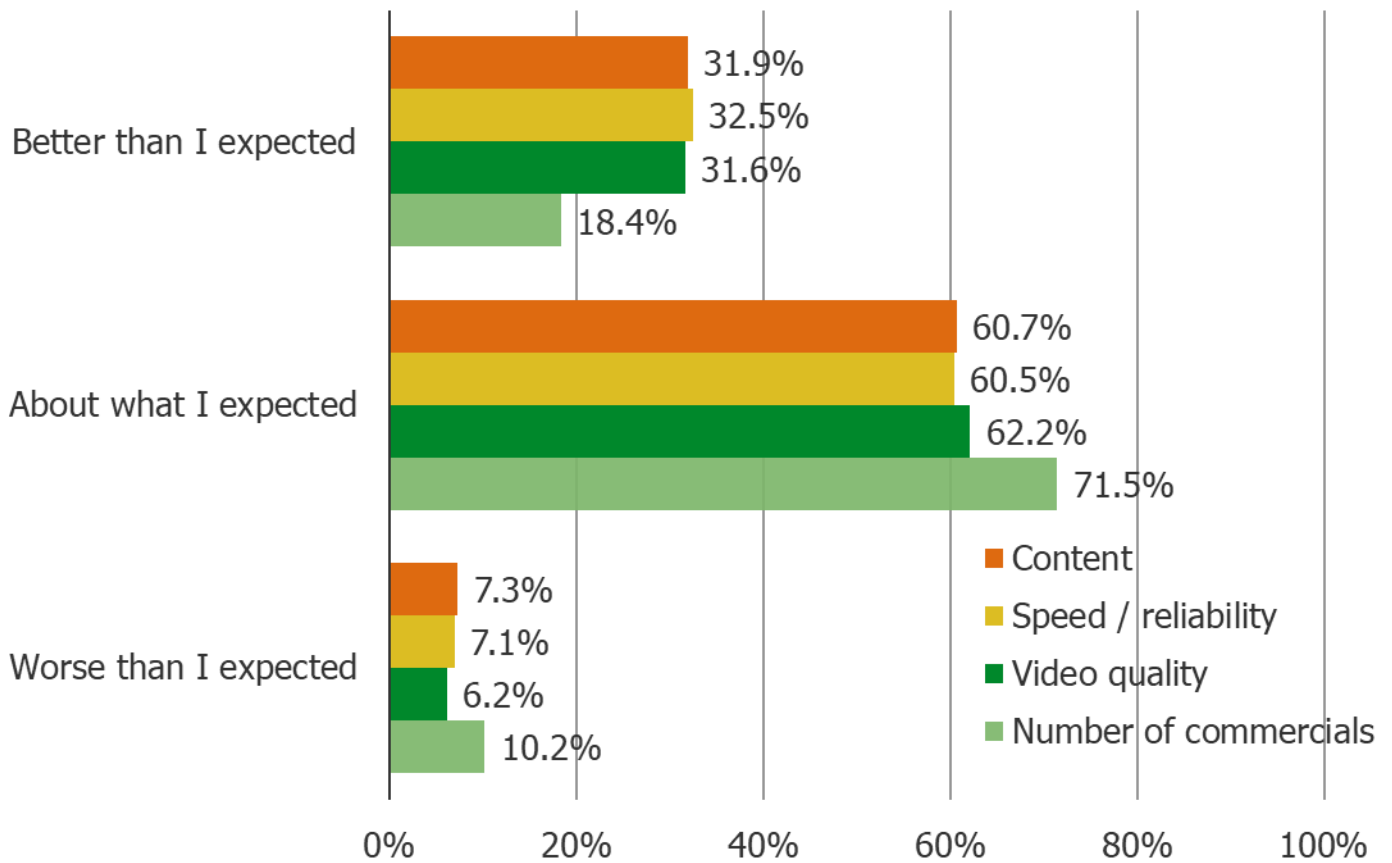
THINKING ABOUT NETFLIX'S AD-SUPPORTED TIER, HOW MANY COMMERCIALS PER HOUR WOULD YOU CONSIDER TO BE...

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



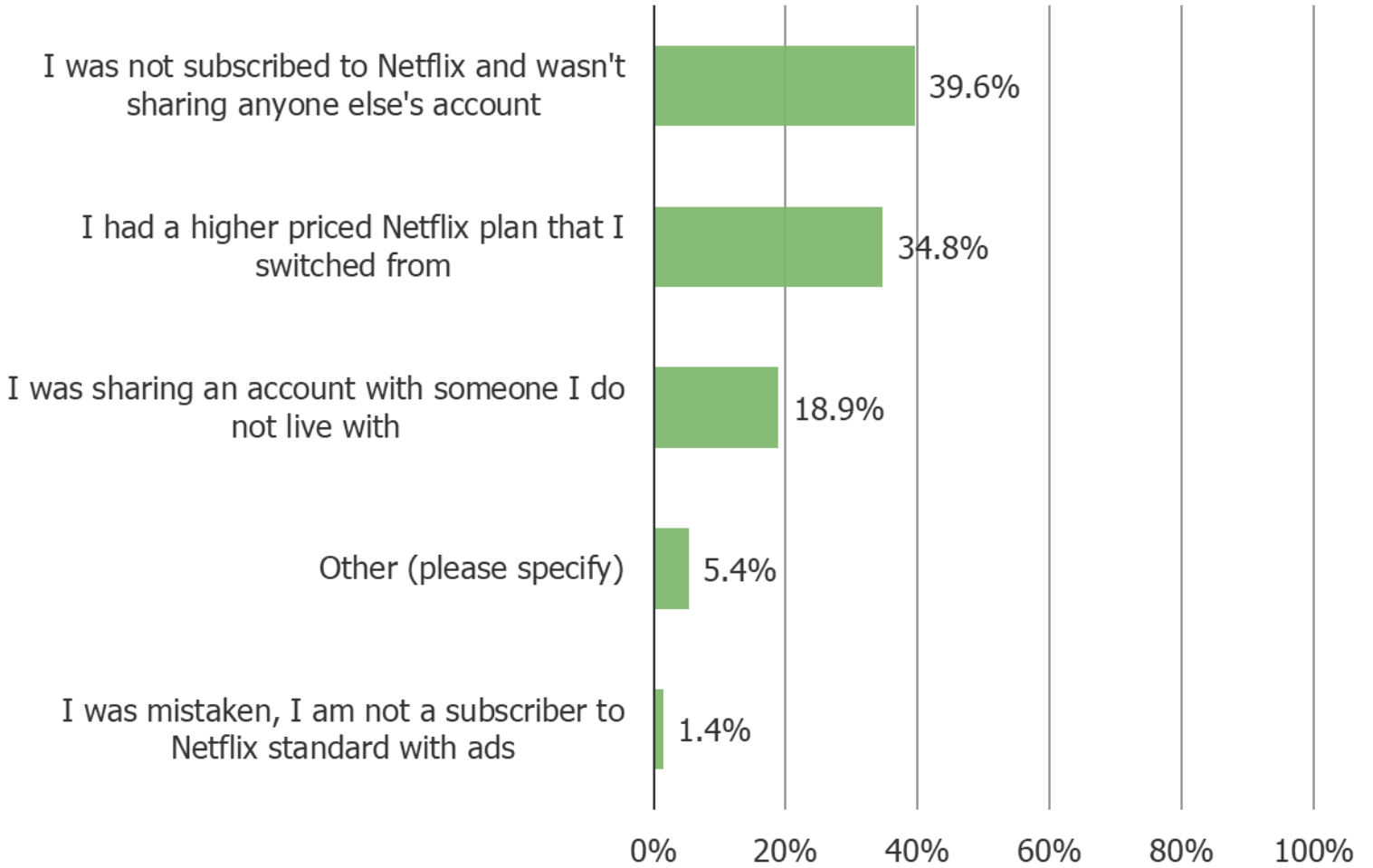
HOW DOES YOUR EXPERIENCE WITH THE STANDARD WITH ADS PLAN COMPARE TO YOUR EXPECTATIONS WHEN IT COMES TO THE FOLLOWING...

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 354



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

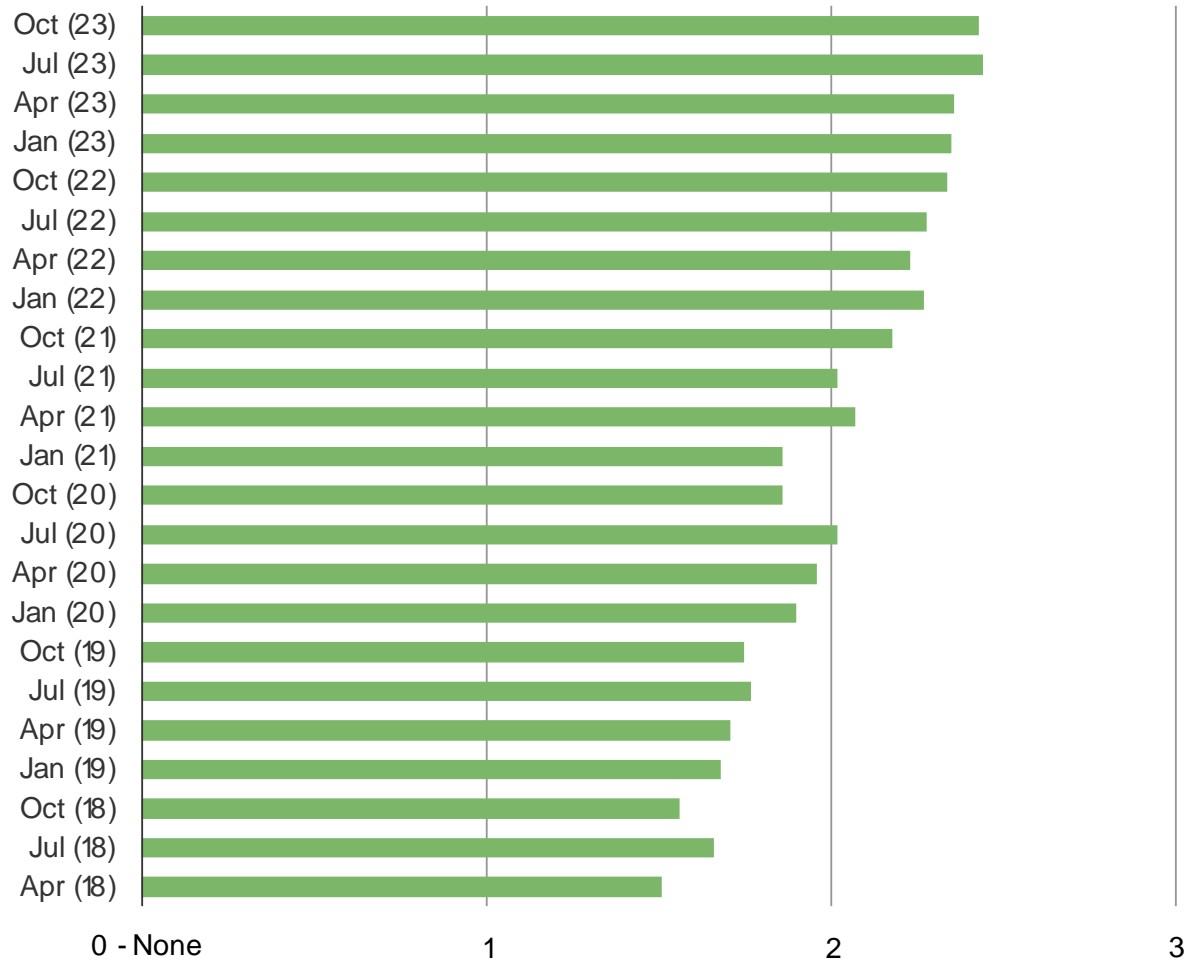
Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 354



STREAMING SECTOR DYNAMICS

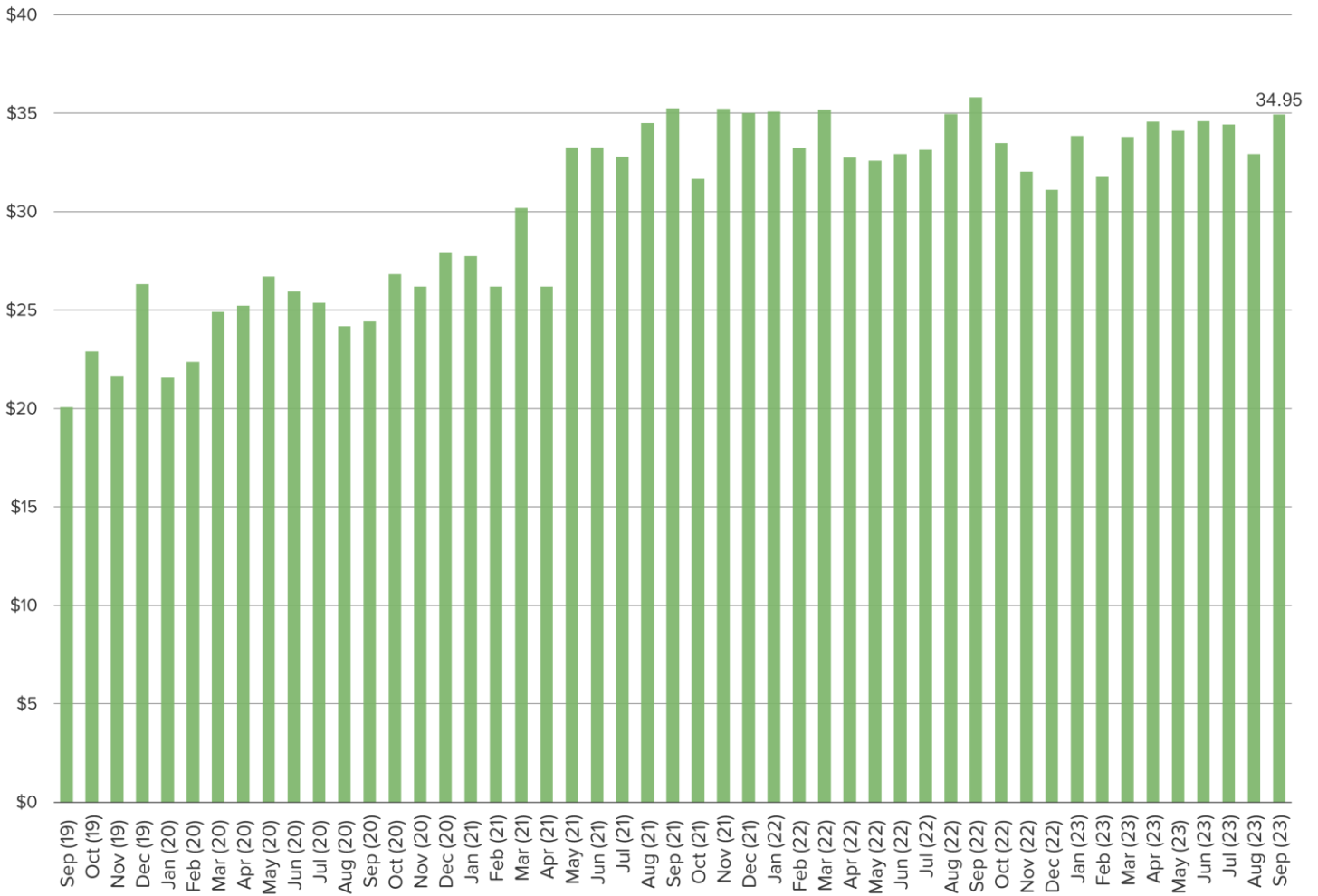
HOW MANY STREAMING VIDEO SERVICES DO YOU THINK IS THE RIGHT NUMBER TO BE PAYING FOR AT THE SAME TIME?

Posed to all respondents.



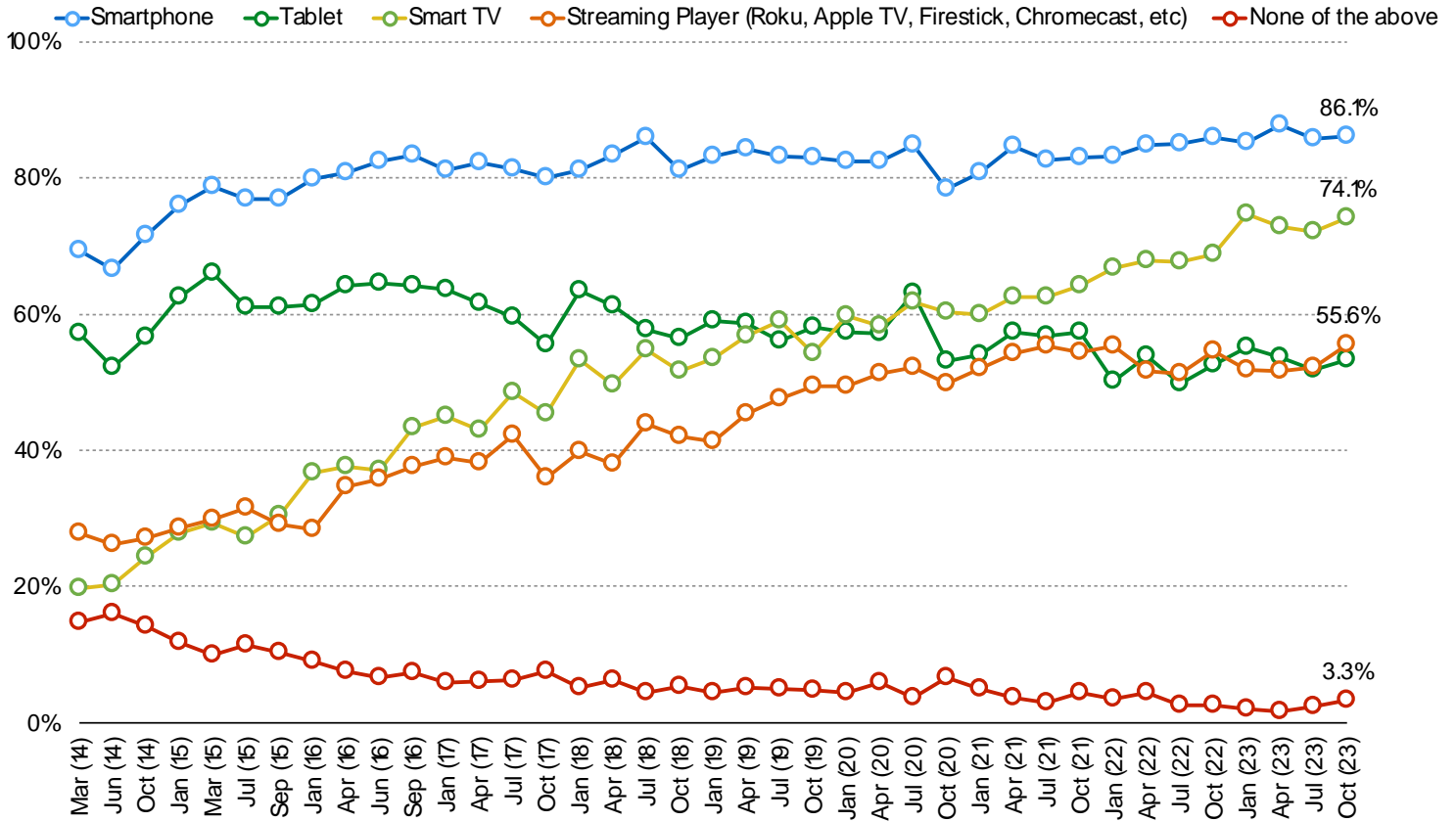
HOW MUCH DO YOU THINK IS APPROPRIATE TO SPEND ON STREAMING VIDEO SERVICES, IN TOTAL, PER MONTH?

Posed to all respondents.



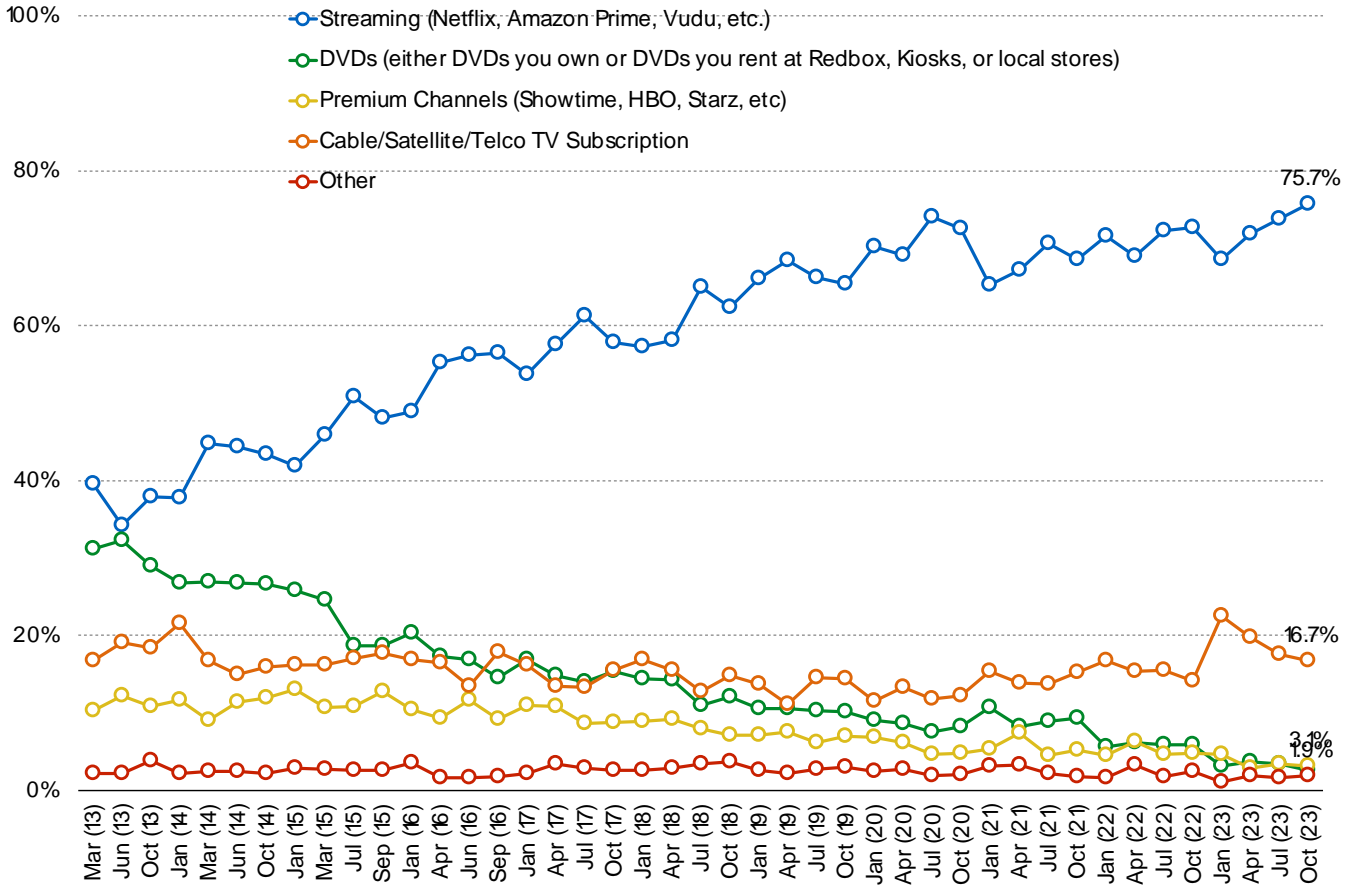
INTERNET CONNECTED DEVICES OWNED BY RESPONDENTS

This question was posed to the target audience.



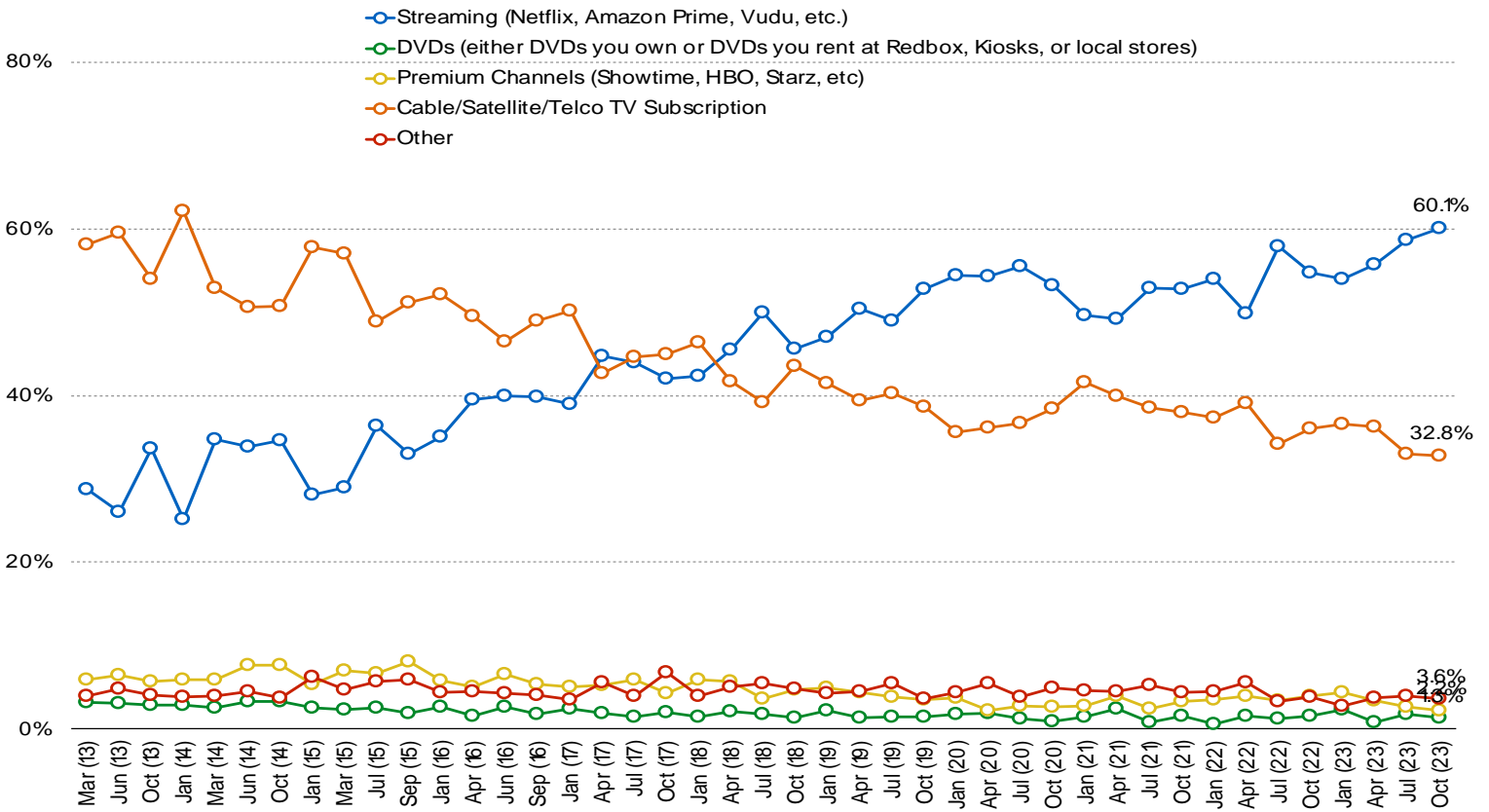
PREFERRED METHOD FOR WATCHING MOVIES

This question was posed to the target audience.



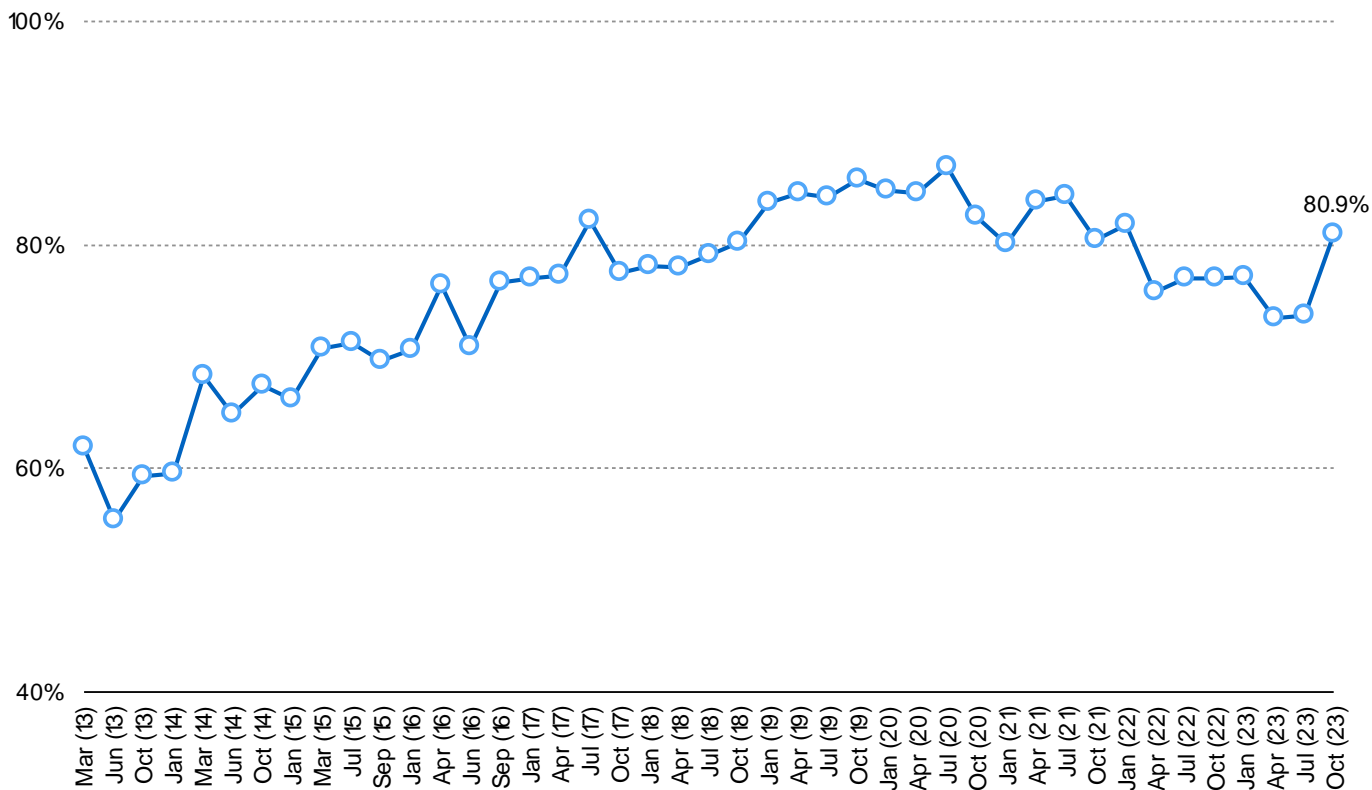
PREFERRED METHOD FOR WATCHING TELEVISION SHOWS

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.

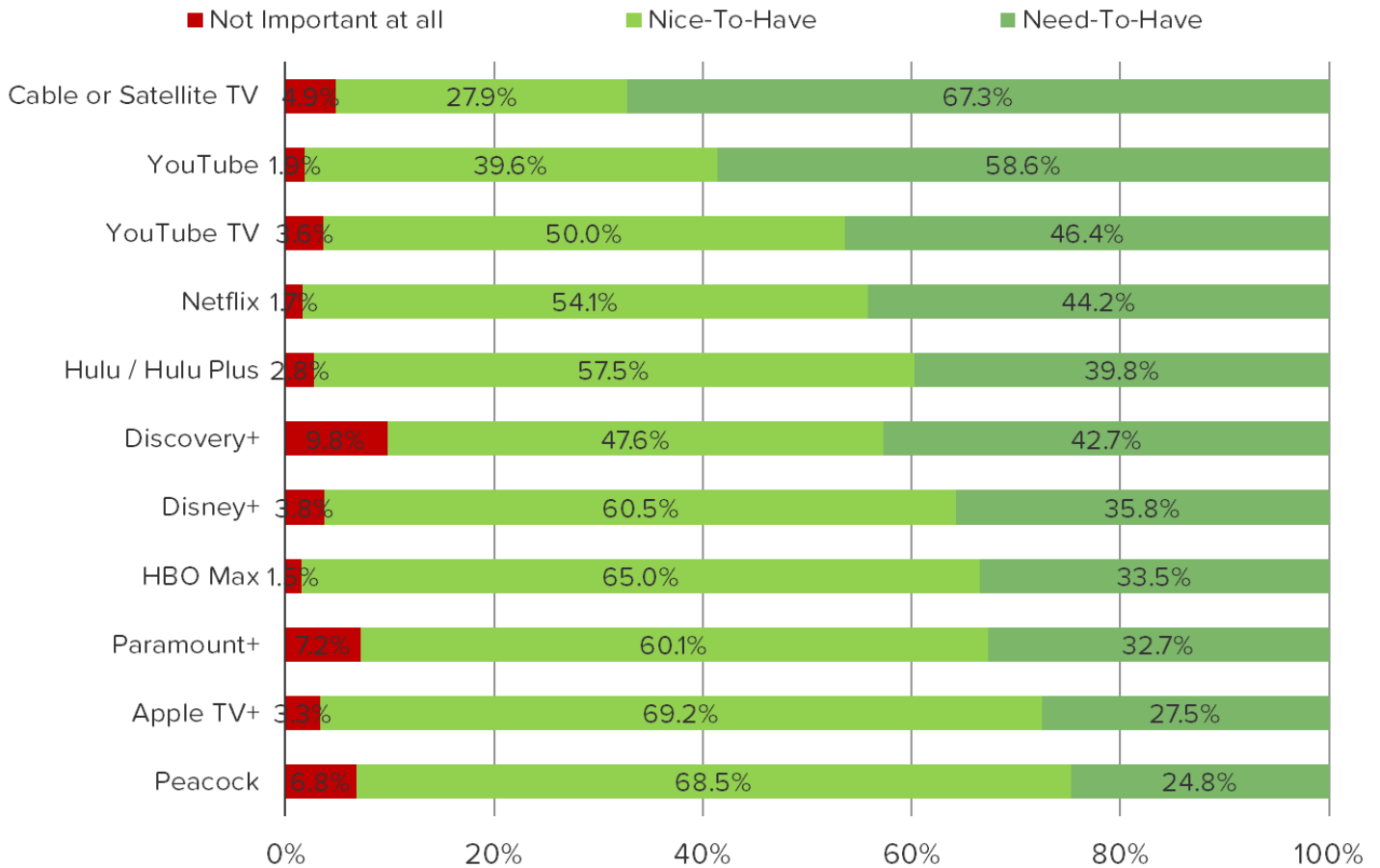


STREAMING PLATFORMS – COMPETITIVE DYNAMICS

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.

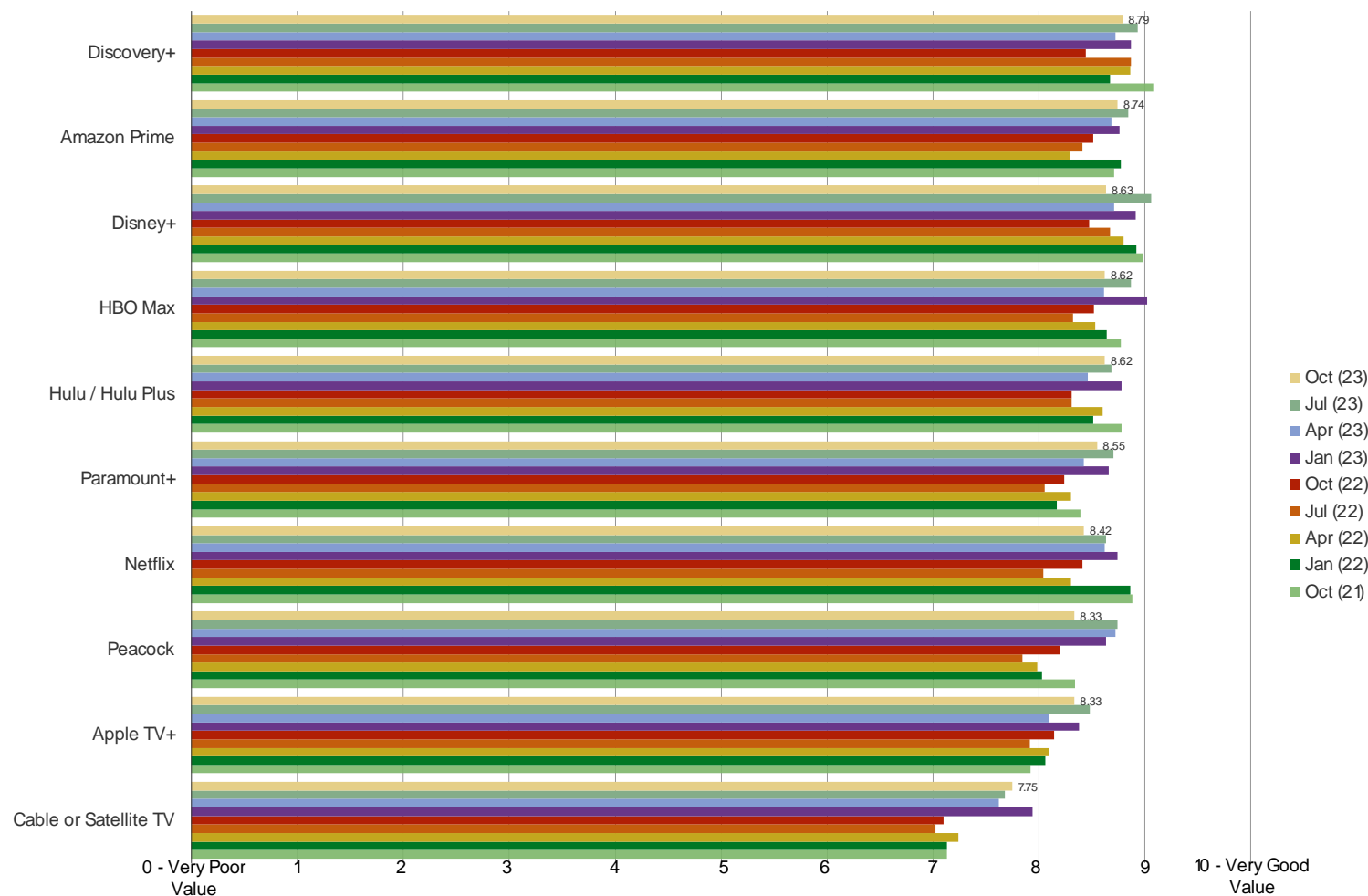
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	N=
Peacock	295
Apple TV+	120
Paramount+	263
HBO Max	260
Disney+	344
Discovery+	82
Hulu / Hulu Plus	400
Netflix	588
YouTube TV	110
YouTube	379
Cable or Satellite TV	287

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

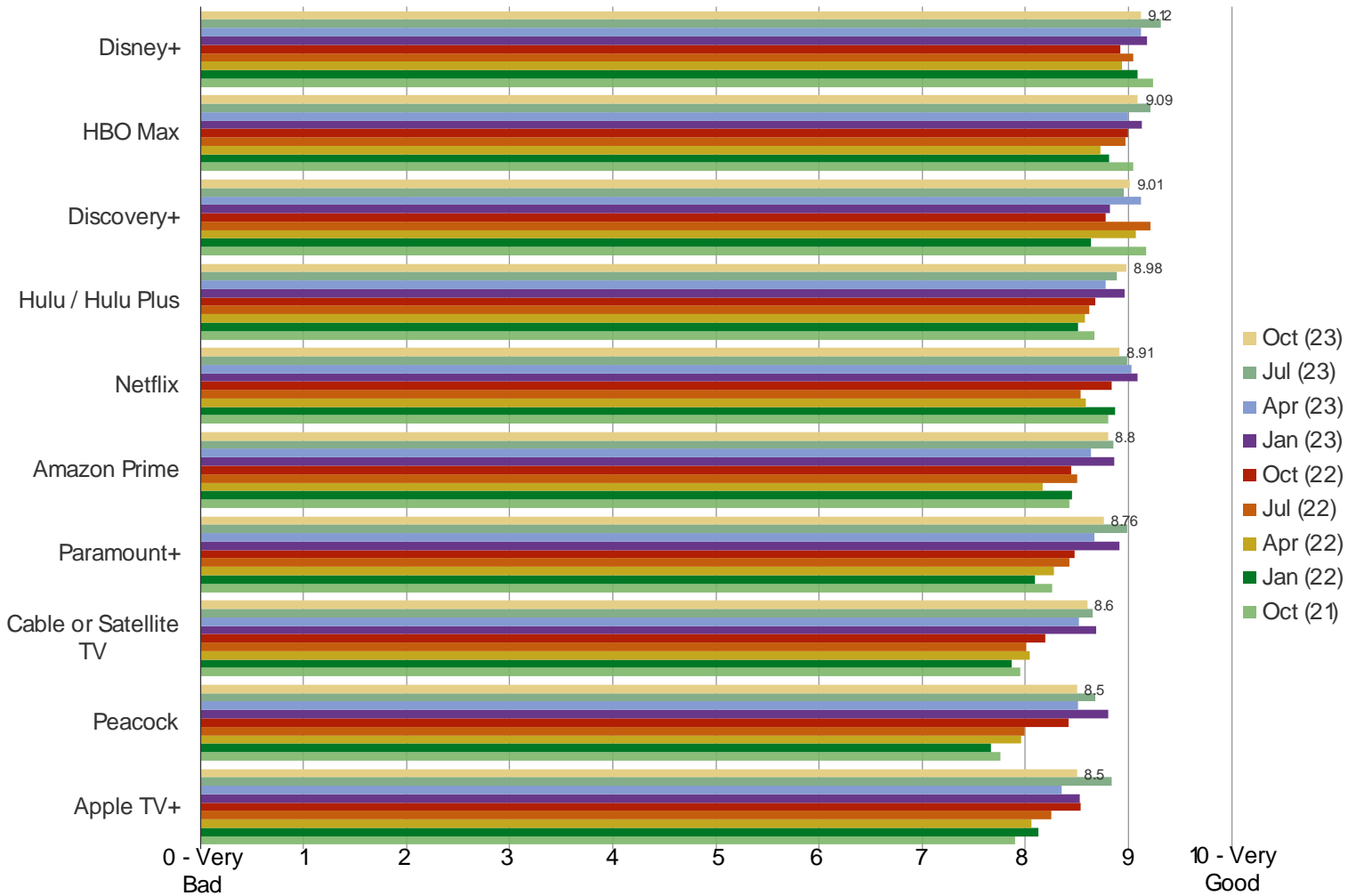
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



	N=
Disney+	302
Netflix	533
Hulu / Hulu Plus	363
HBO Max	229
Amazon Prime	466
Apple TV+	114
Cable or Satellite TV	286
Peacock	274
Discovery+	78
Paramount+	237

PLEASE RATE THE CONTENT AVAILABLE ON THE FOLLOWING:

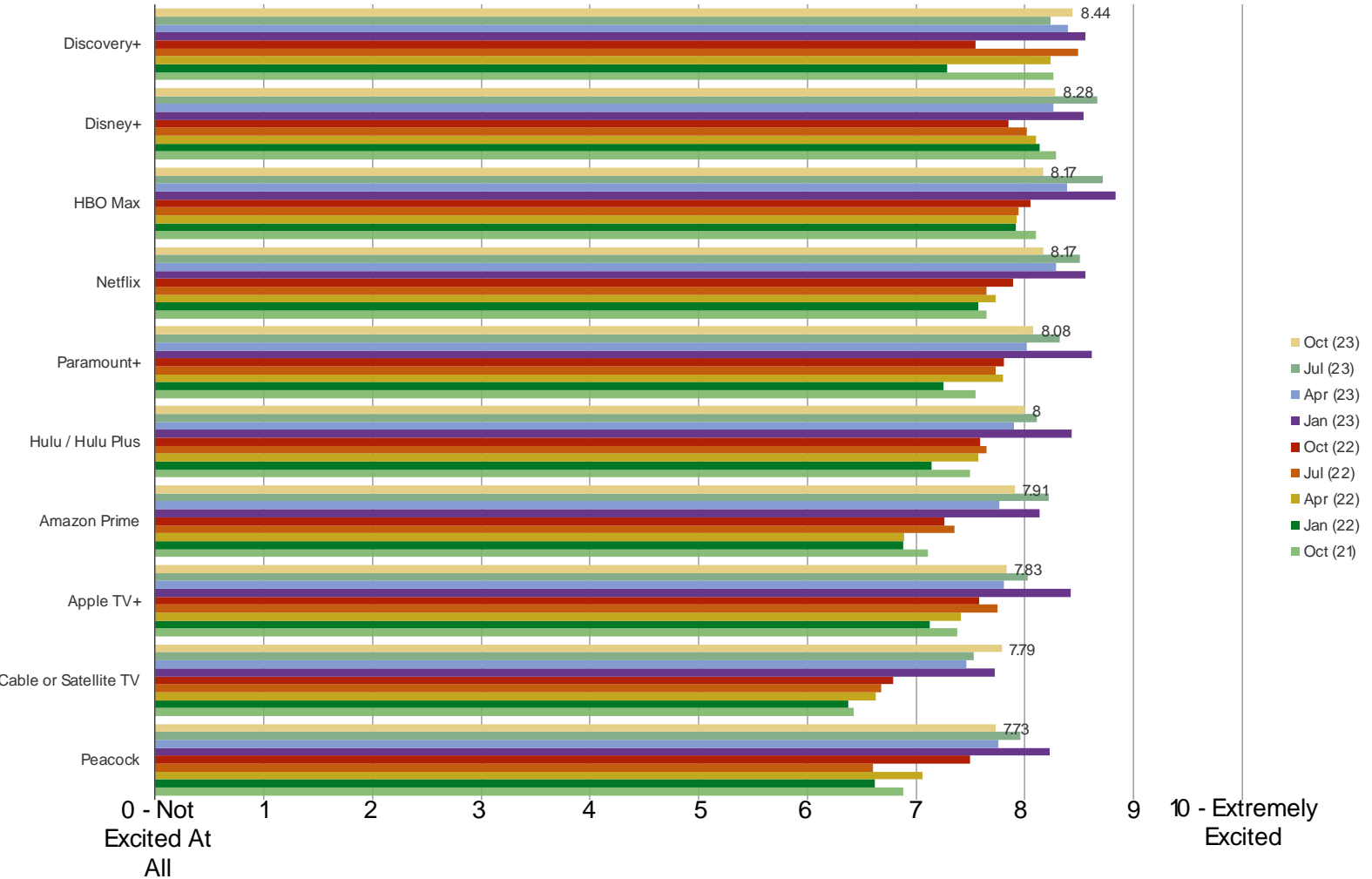
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PLEASE RATE HOW EXCITED YOU ARE FOR UPCOMING CONTENT (RELEASES IN THE NEXT 3 MONTHS) ON THE FOLLOWING?

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.



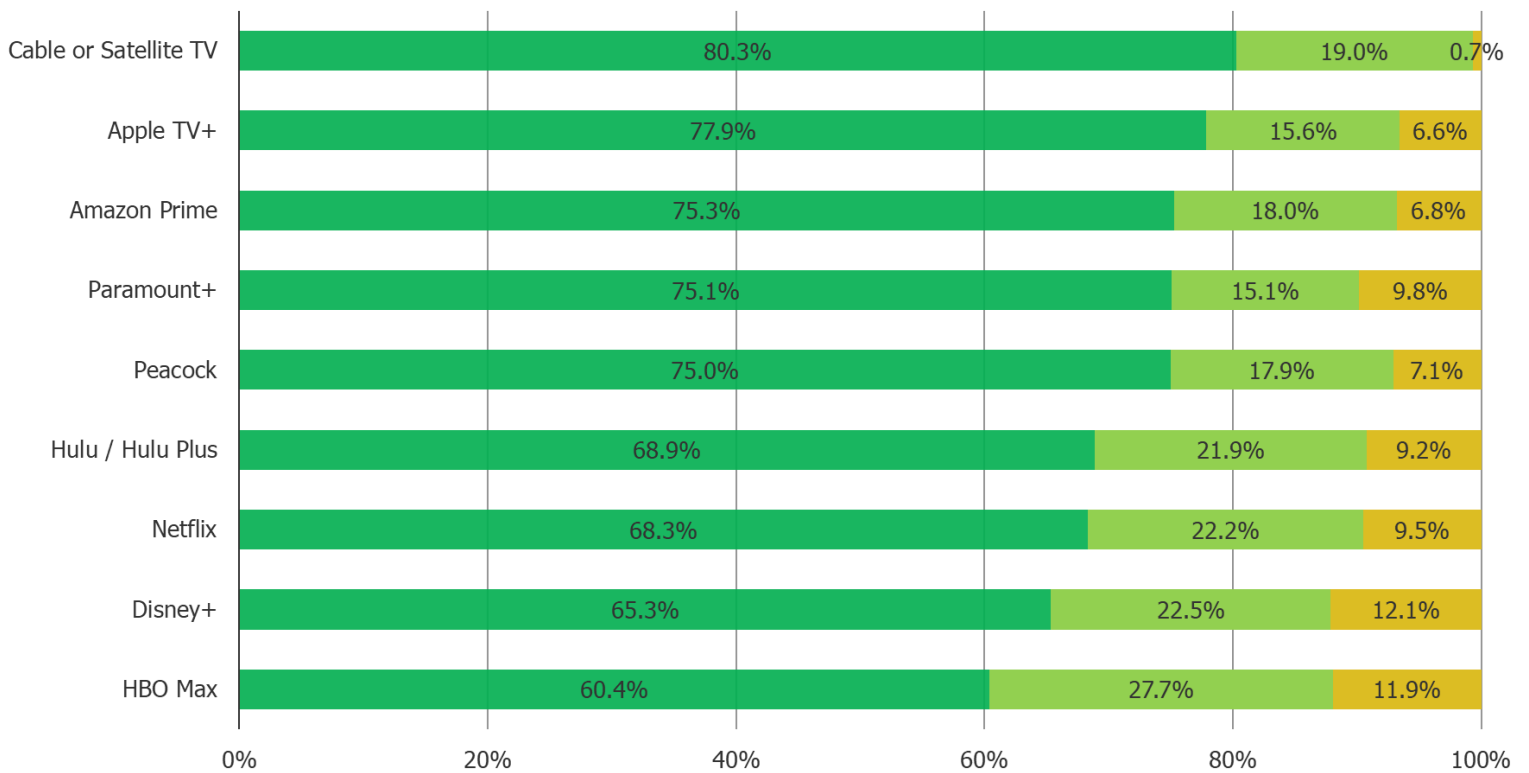
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Paramount+	237

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.

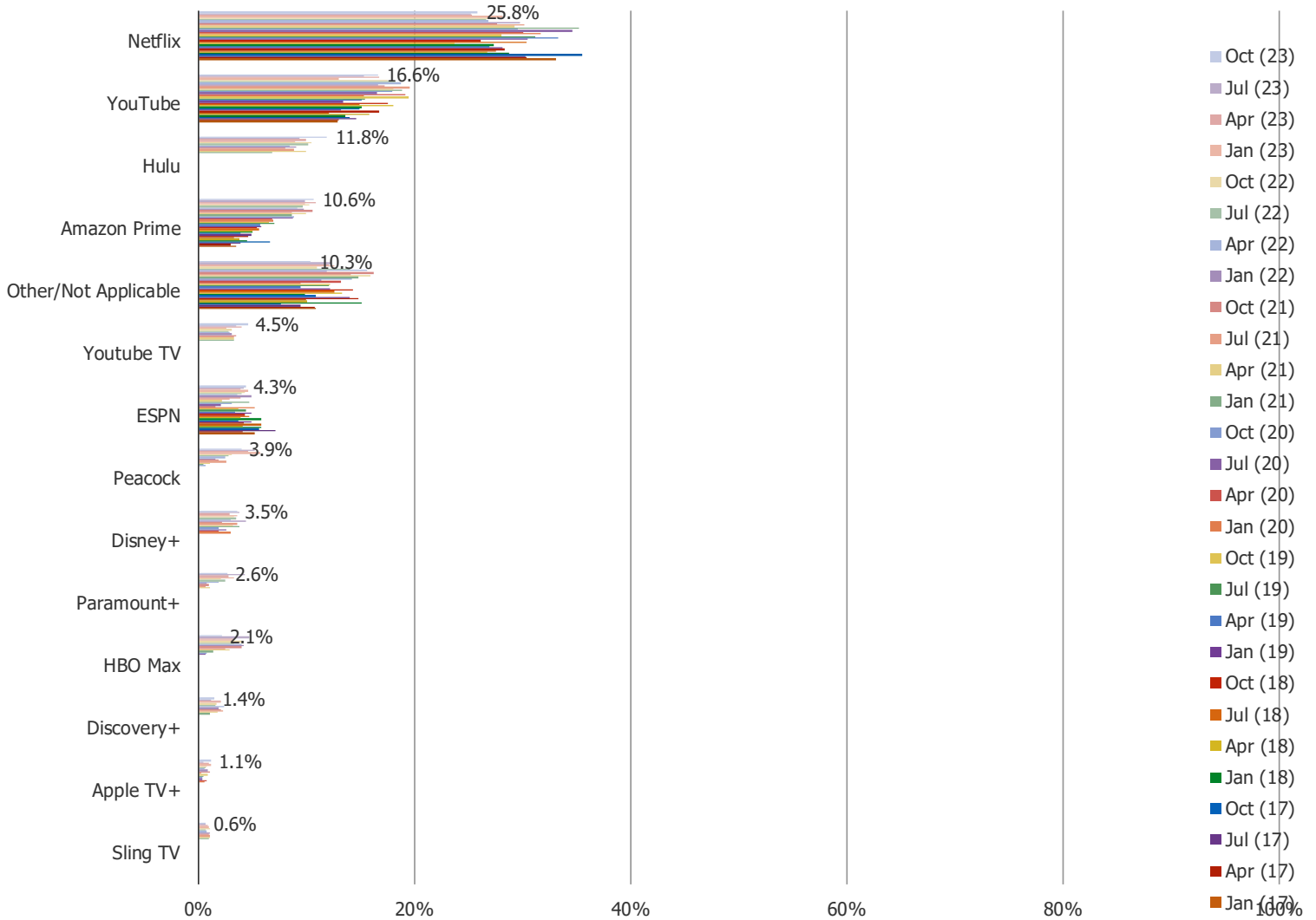
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■ I pay for this service myself ■ I live with someone who pays for this service ■ I access this service via someone's log-in who I don't live with



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

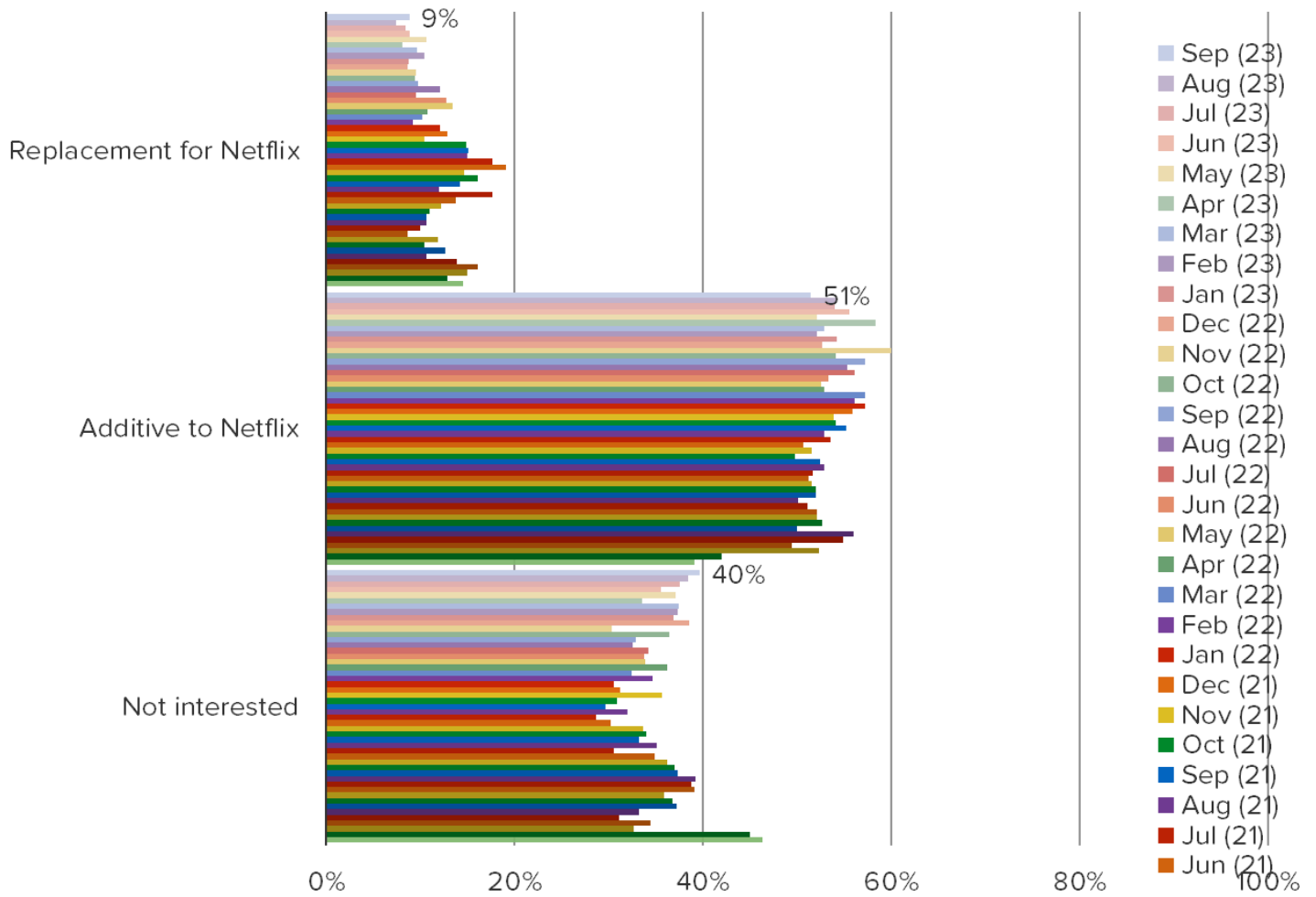
Posed to all respondents



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

Posed to Netflix subscribers.

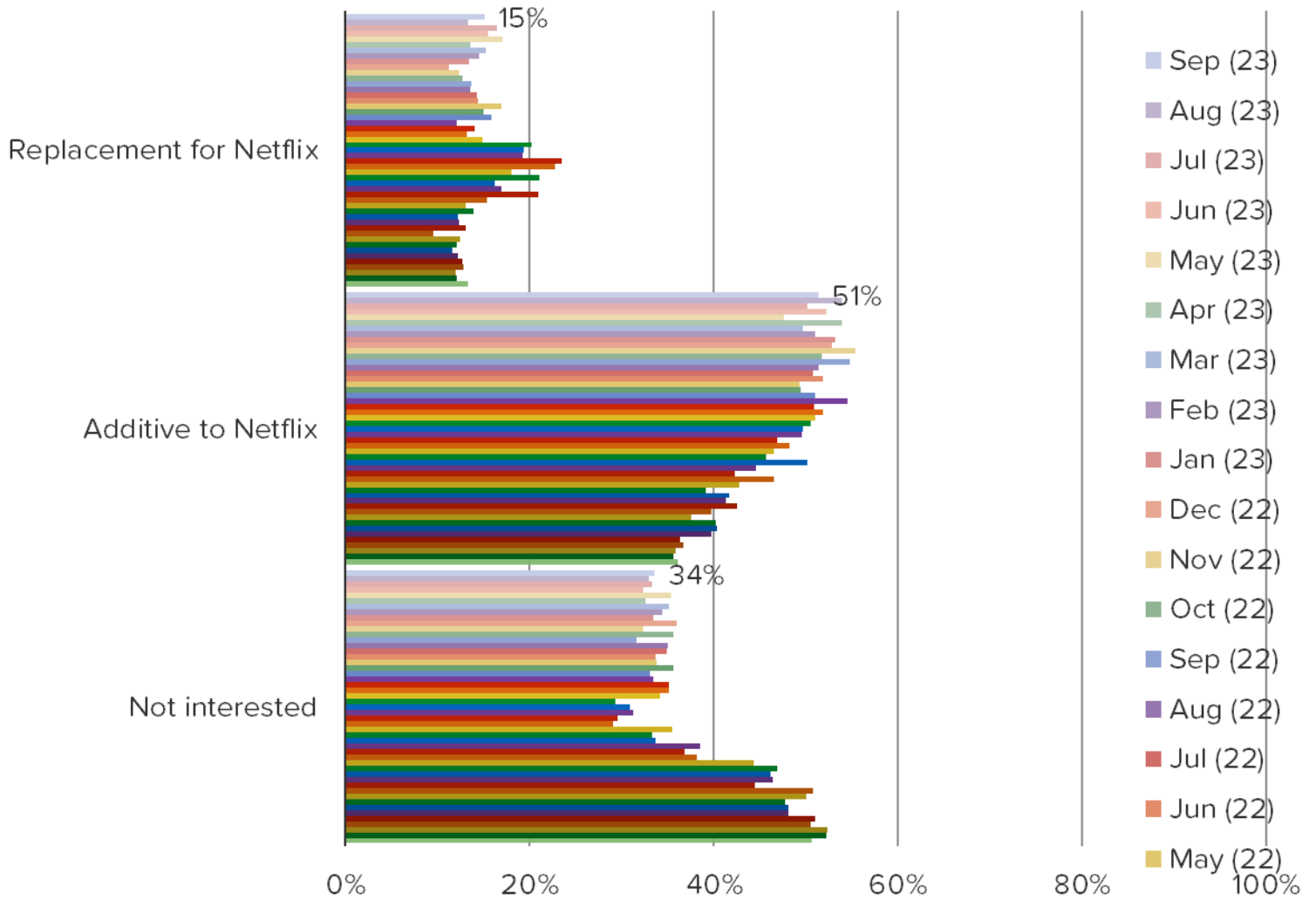
Disney+



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Posed to Netflix subscribers.

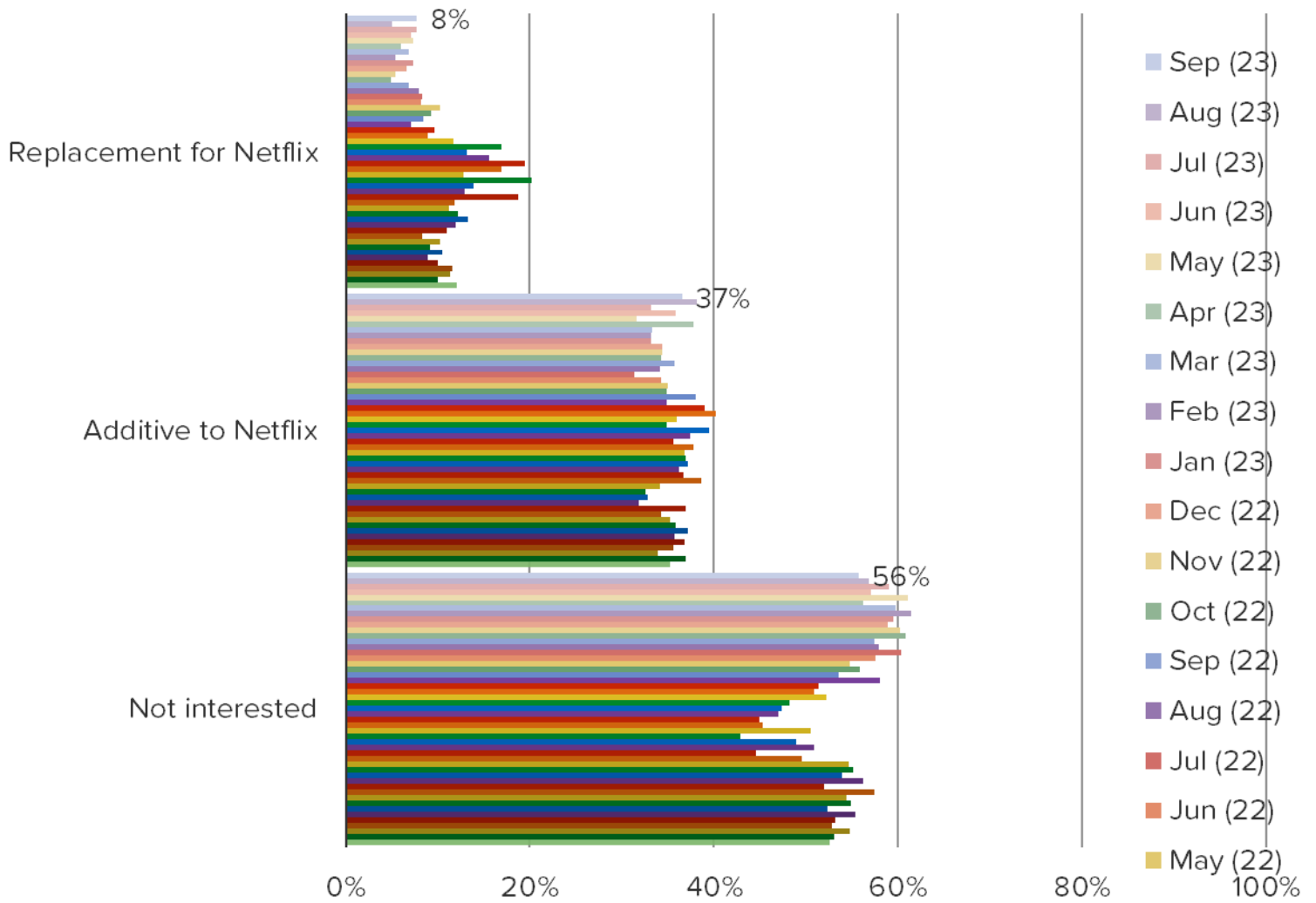
HBO Max



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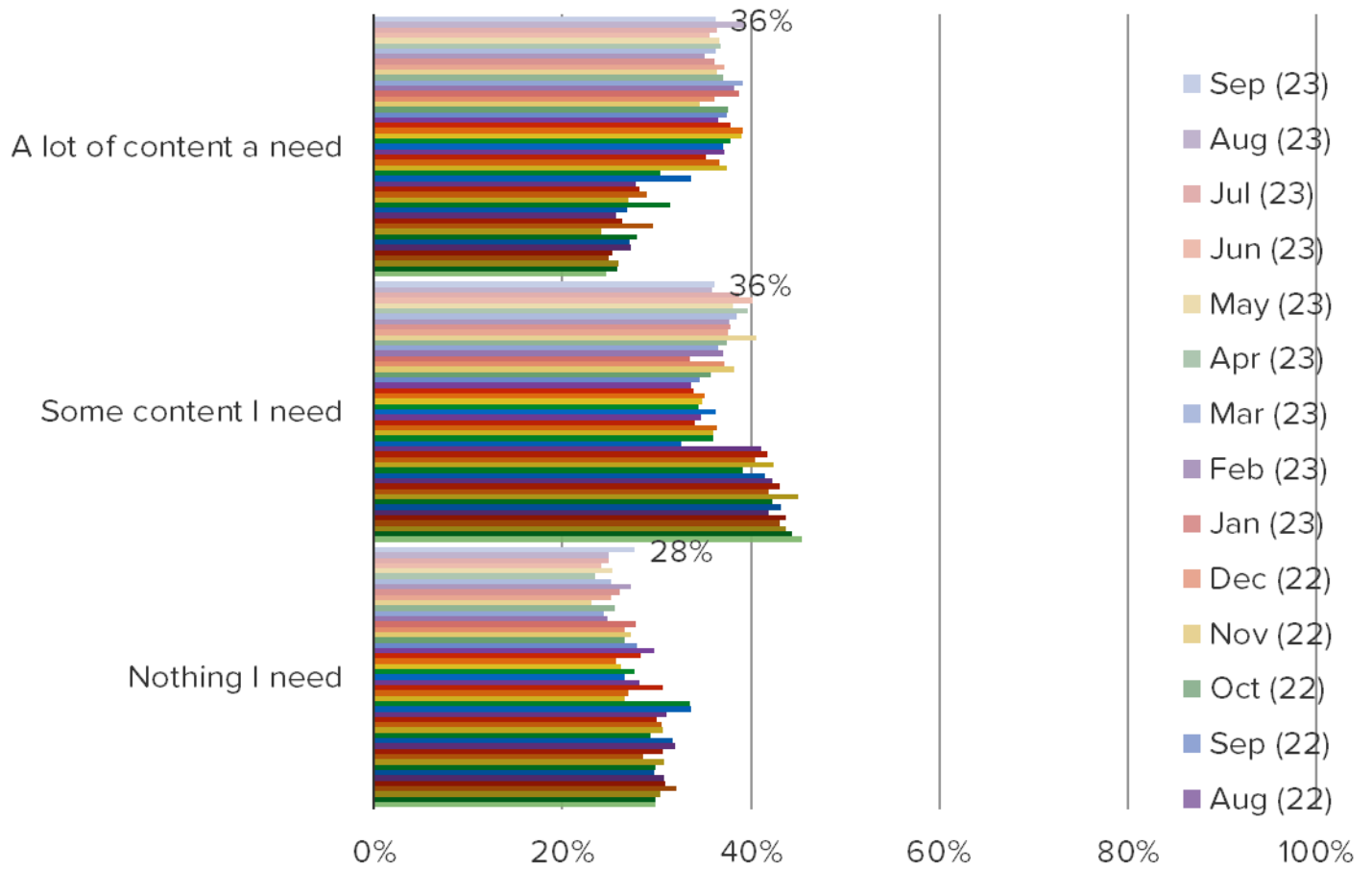
Apple TV+



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

Posed to all respondents.

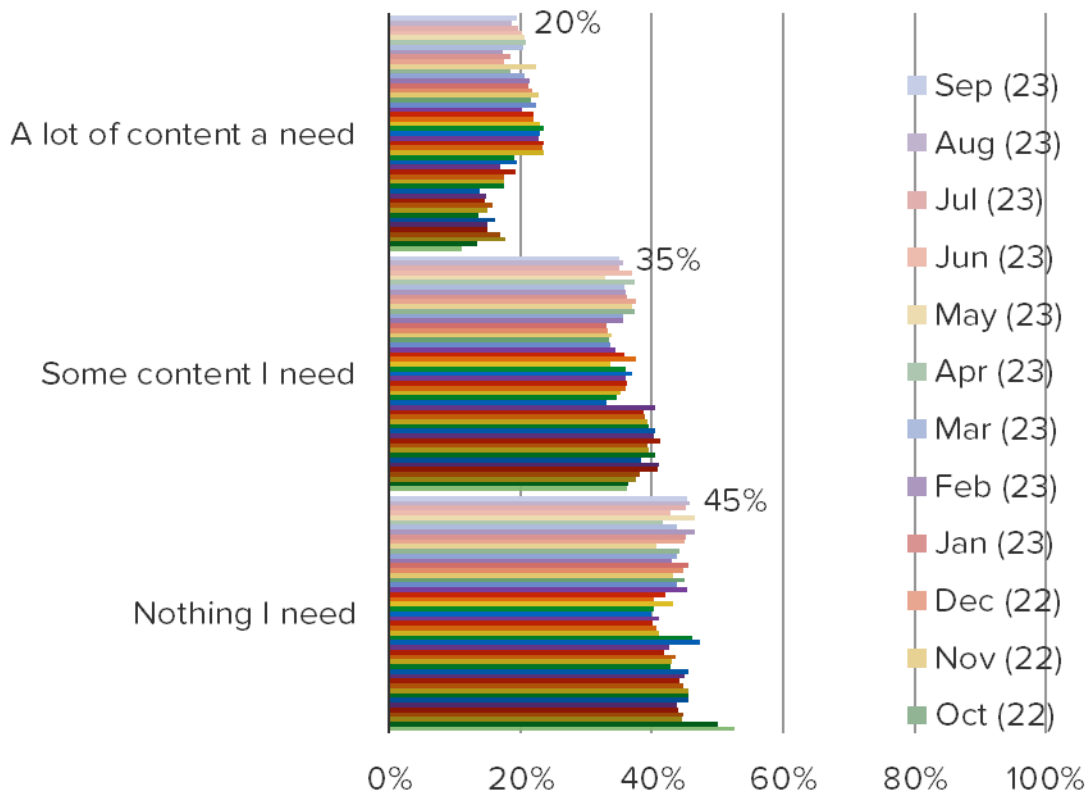
Netflix



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Posed to all respondents.

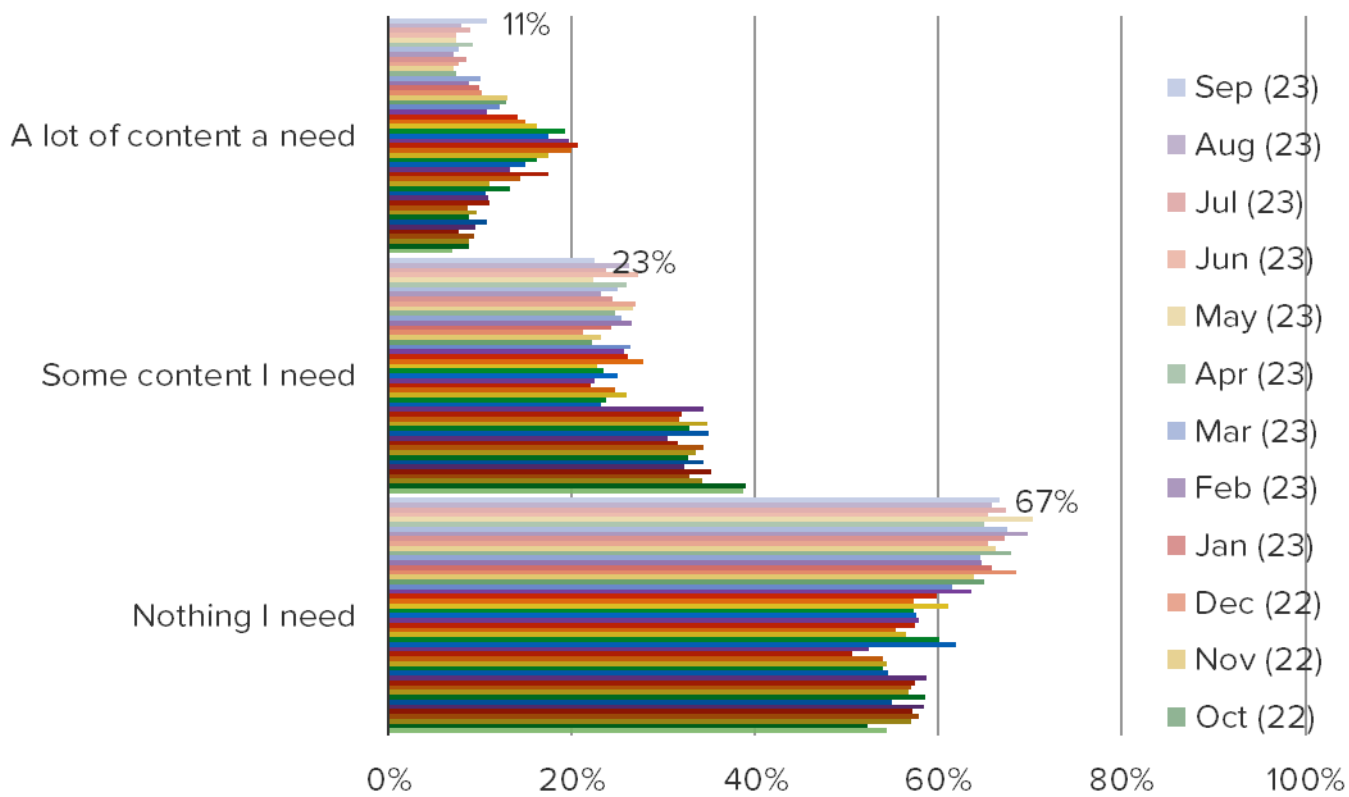
Disney+



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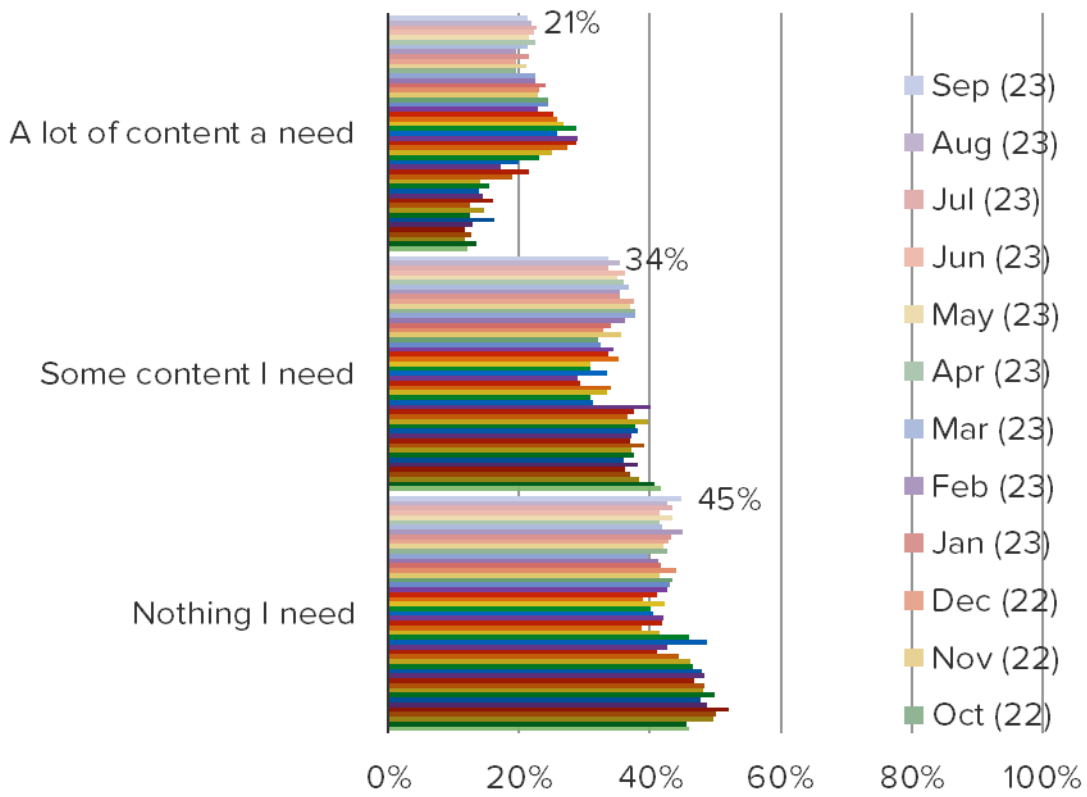
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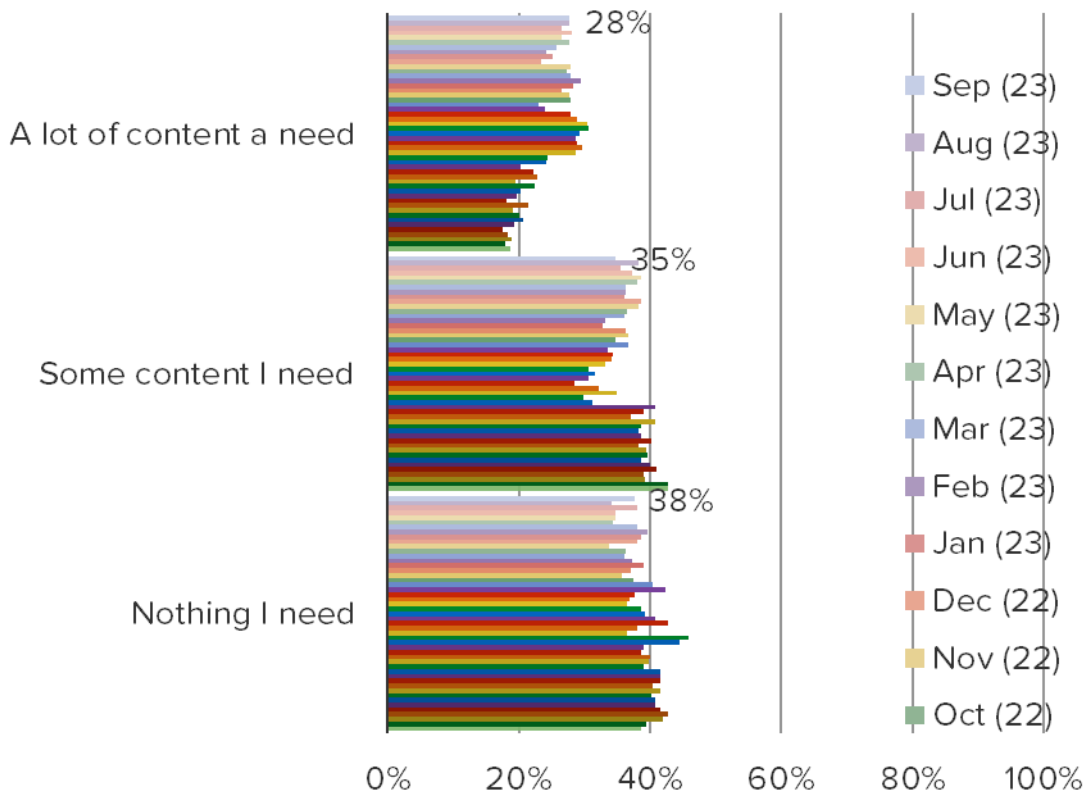
HBO Max



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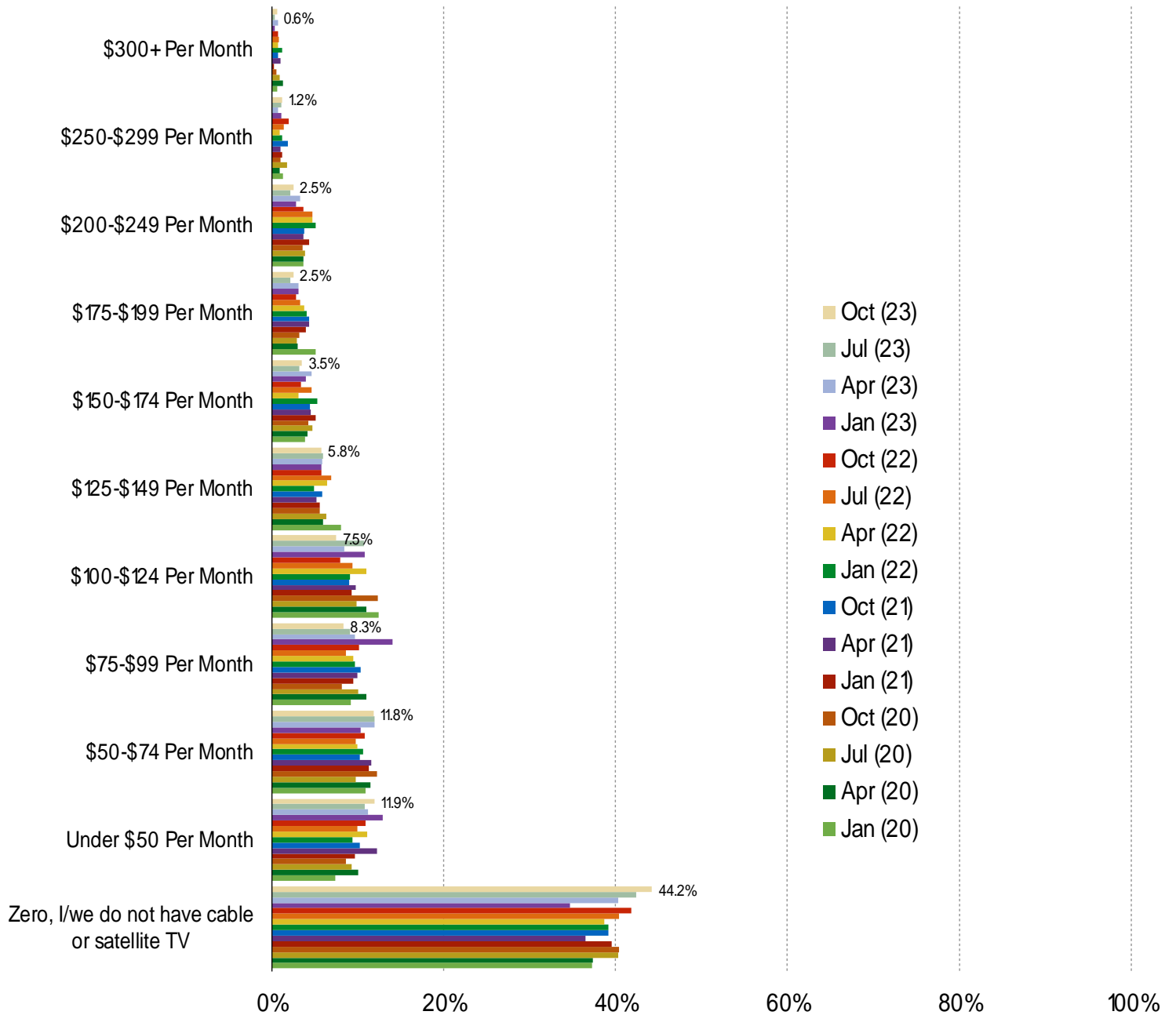
Hulu



SPEND ON CONTENT

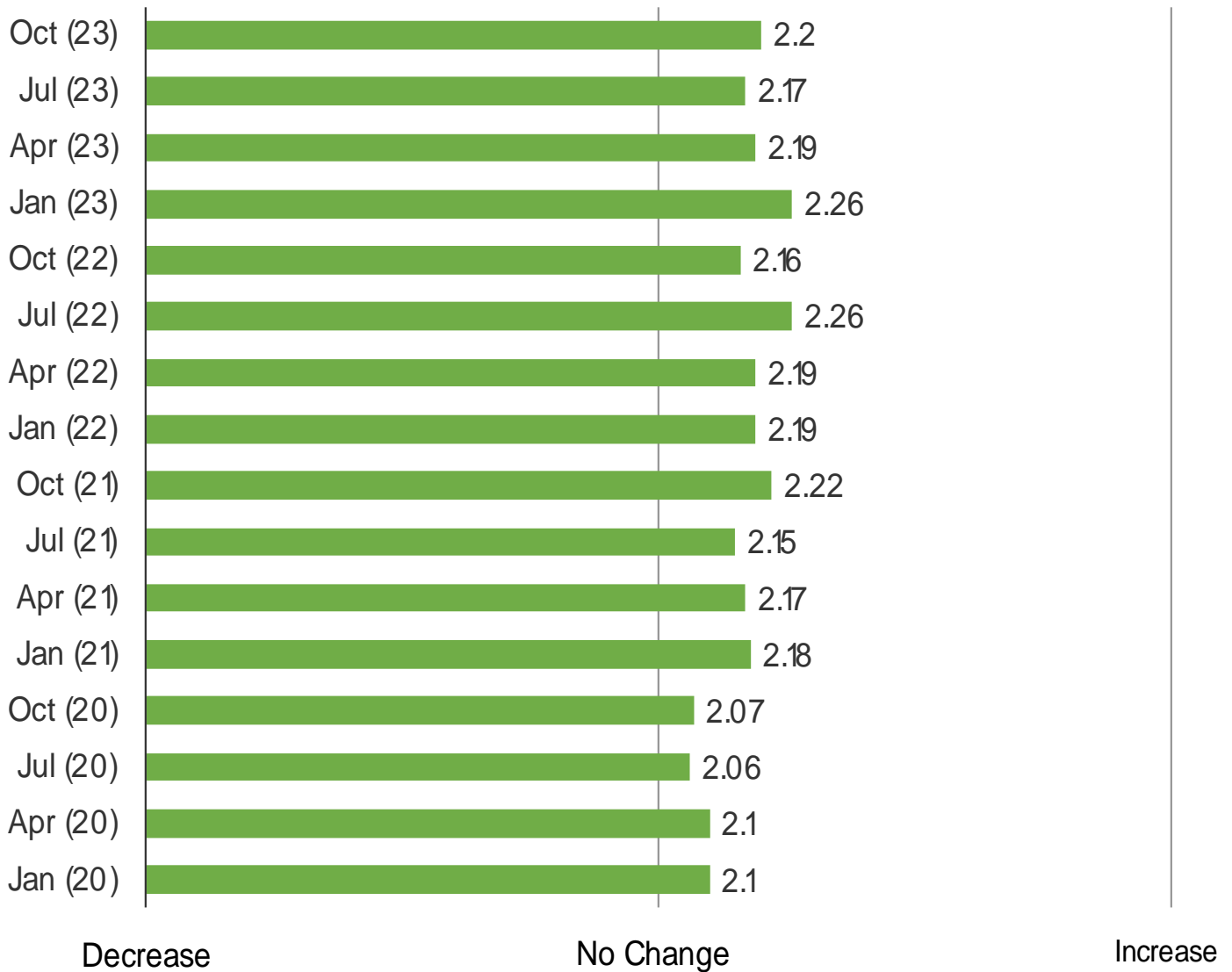
APPROXIMATELY HOW MUCH DO YOU SPEND ON CABLE/SATELLITE TV SERVICES PER MONTH?

Posed to respondents who watch video content at home.



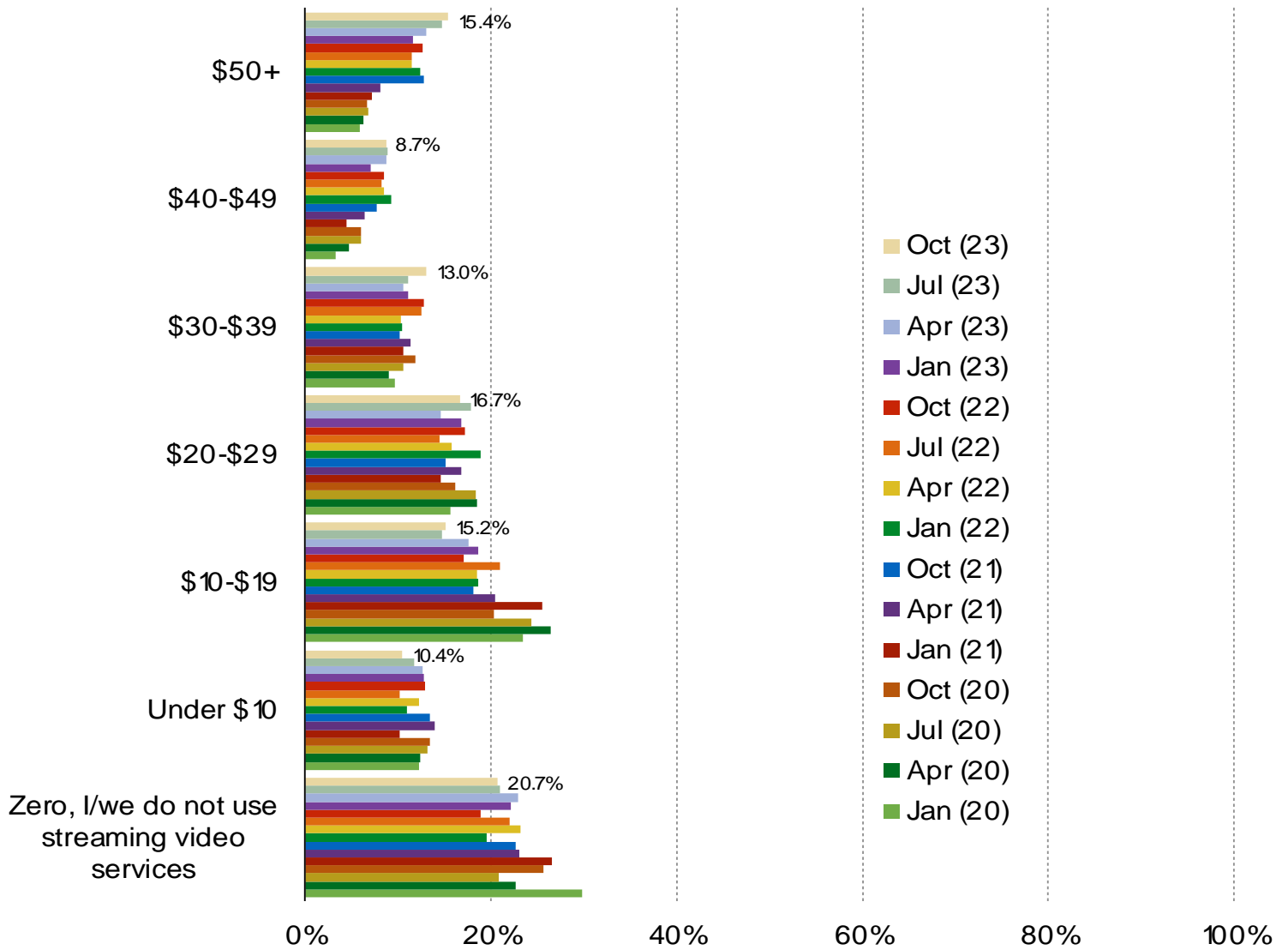
IN THE NEXT YEAR, DO YOU EXPECT THE AMOUNT YOU PAY PER MONTH FOR CABLE OR SATELLITE TV TO CHANGE IN ANY WAY?

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



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

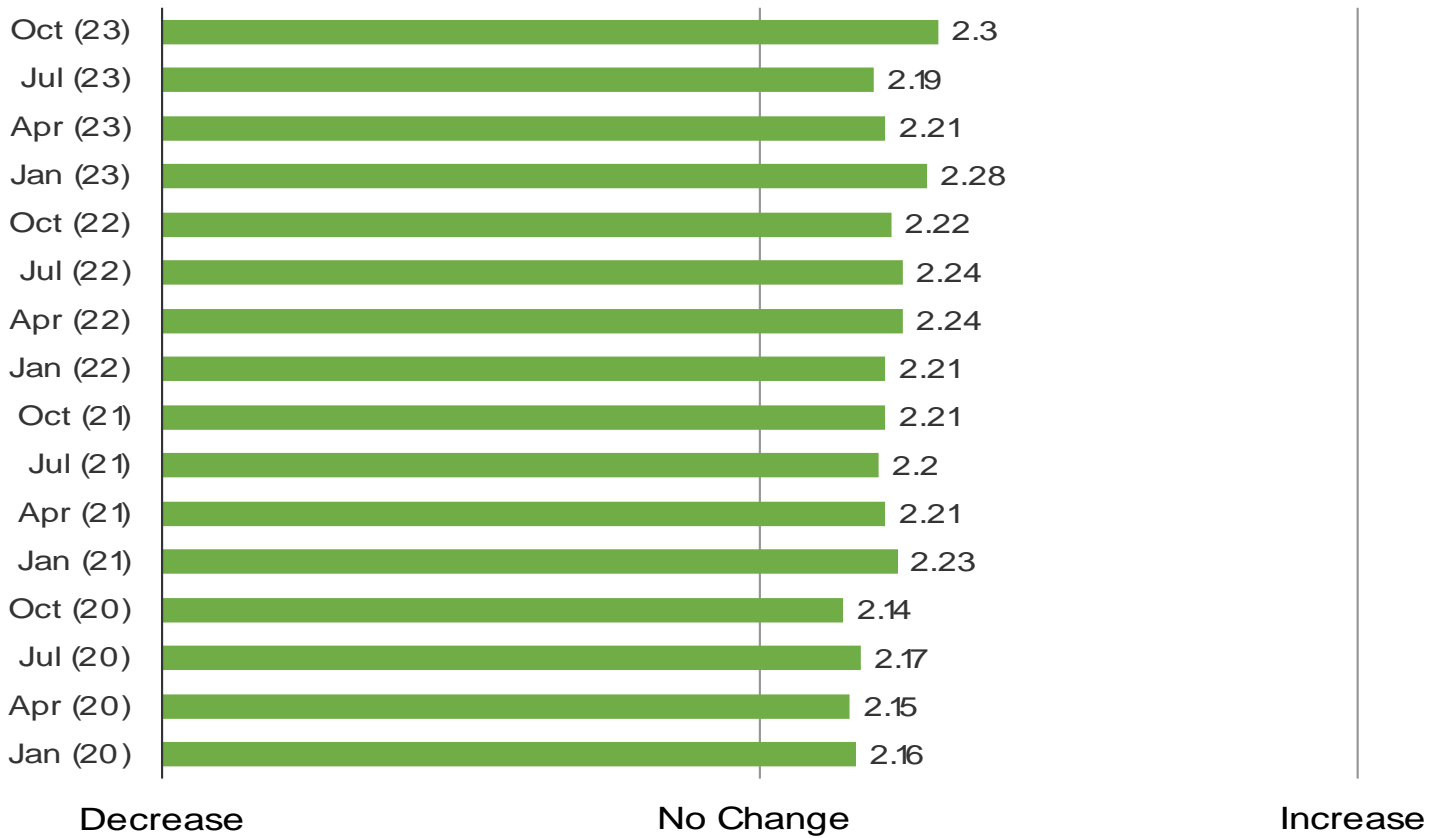
Posed to respondents who watch video content at home.



Streaming Video

IN THE NEXT YEAR, DO YOU EXPECT THE AMOUNT YOU PAY PER MONTH FOR STREAMING VIDEO SERVICES TO CHANGE IN ANY WAY?

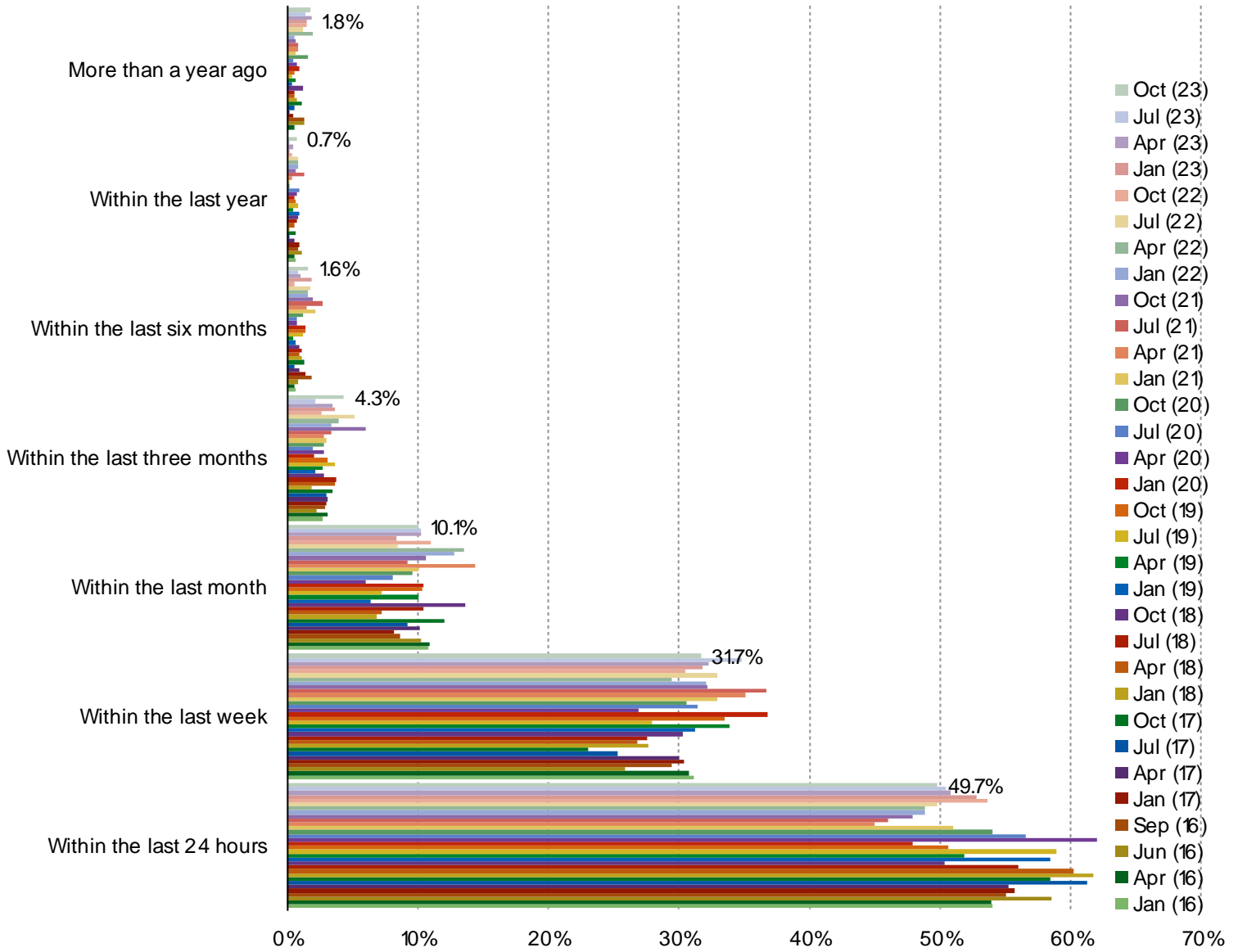
Posed to respondents who currently pay for cable or satellite tv.



NETFLIX SUBSCRIBER ENGAGEMENT

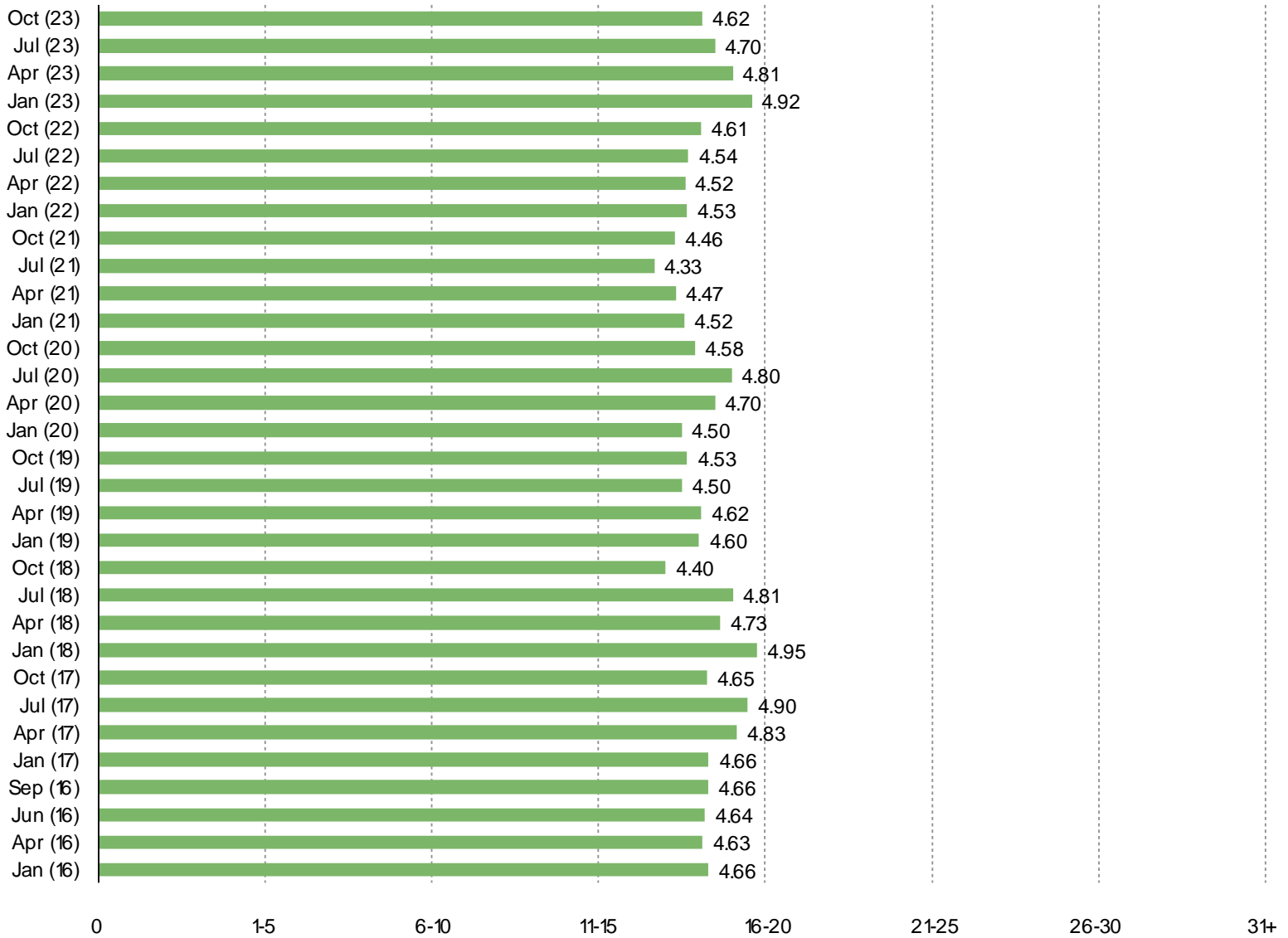
WHEN IS THE LAST TIME YOU WATCHED SOMETHING ON NETFLIX?

Posed to Netflix subscribers.



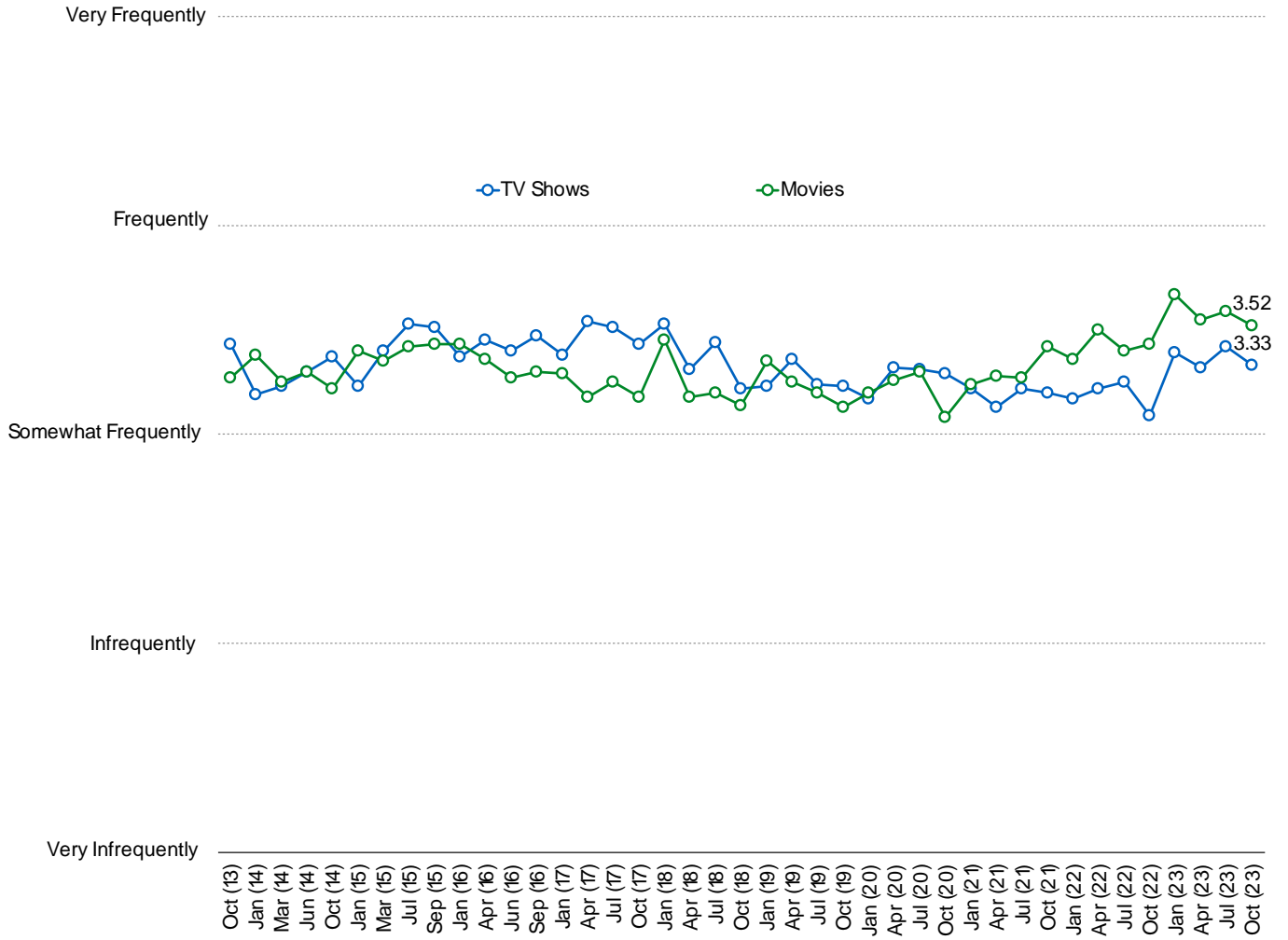
IN AN AVERAGE MONTH, HOW MANY HOURS OF NETFLIX DO YOU WATCH?

Posed to Netflix subscribers.



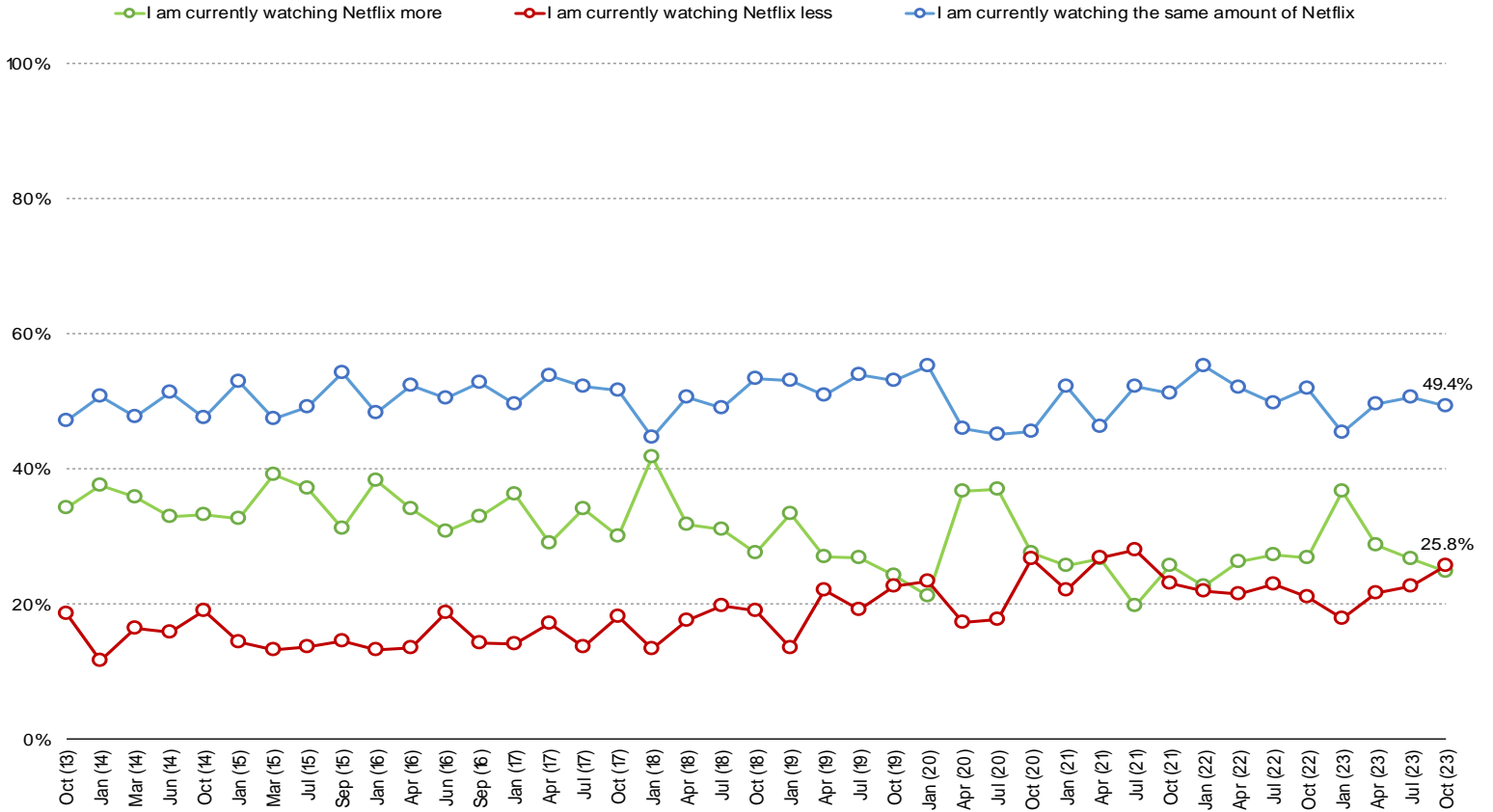
FREQUENCY OF WATCHING TV SHOWS AND MOVIES

Posed to Netflix subscribers.



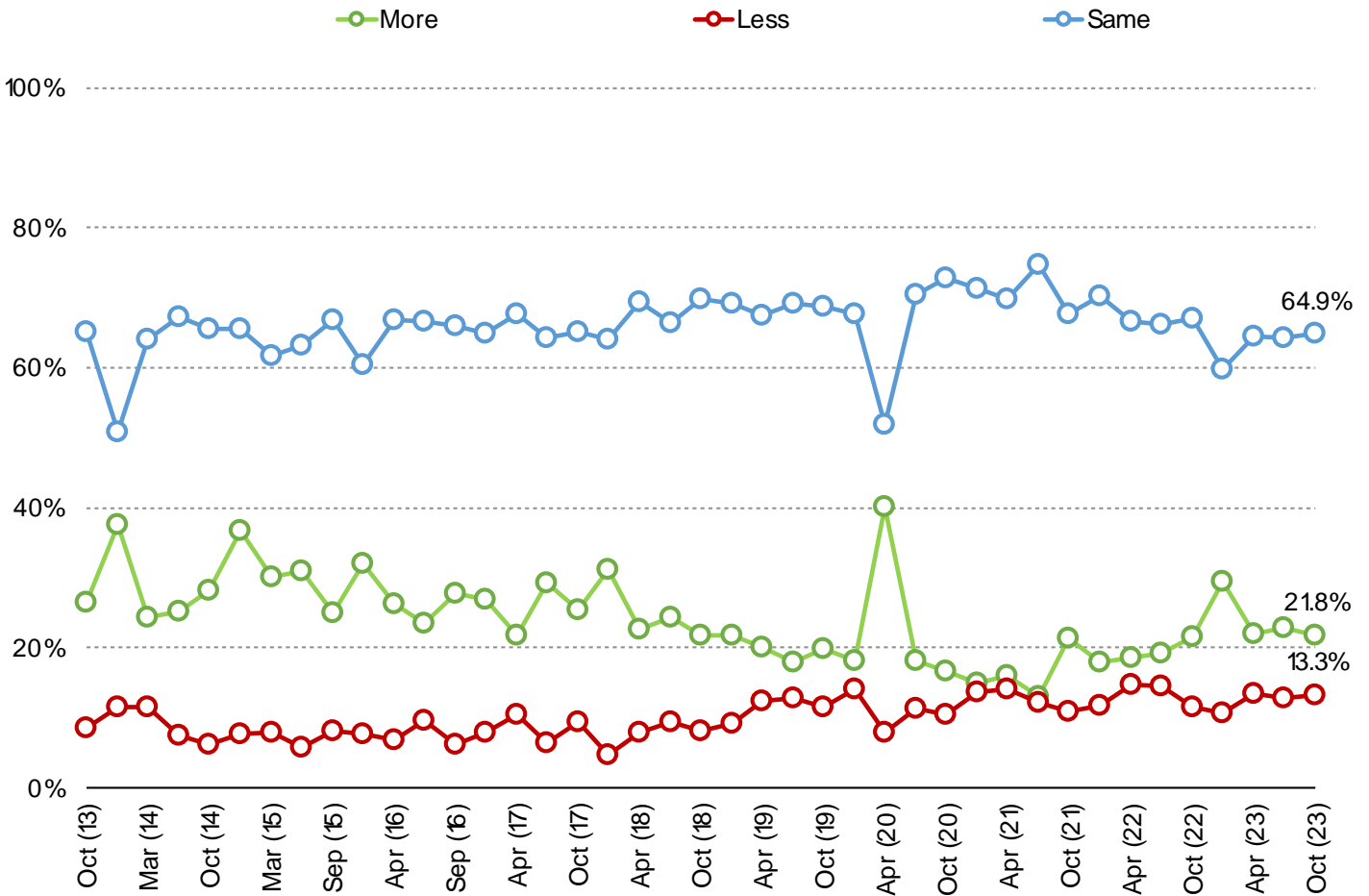
PLEASE COMPARE YOUR CURRENT USAGE OF NETFLIX WITH YOUR USAGE 3-6 MONTHS AGO.

Posed to Netflix subscribers.



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

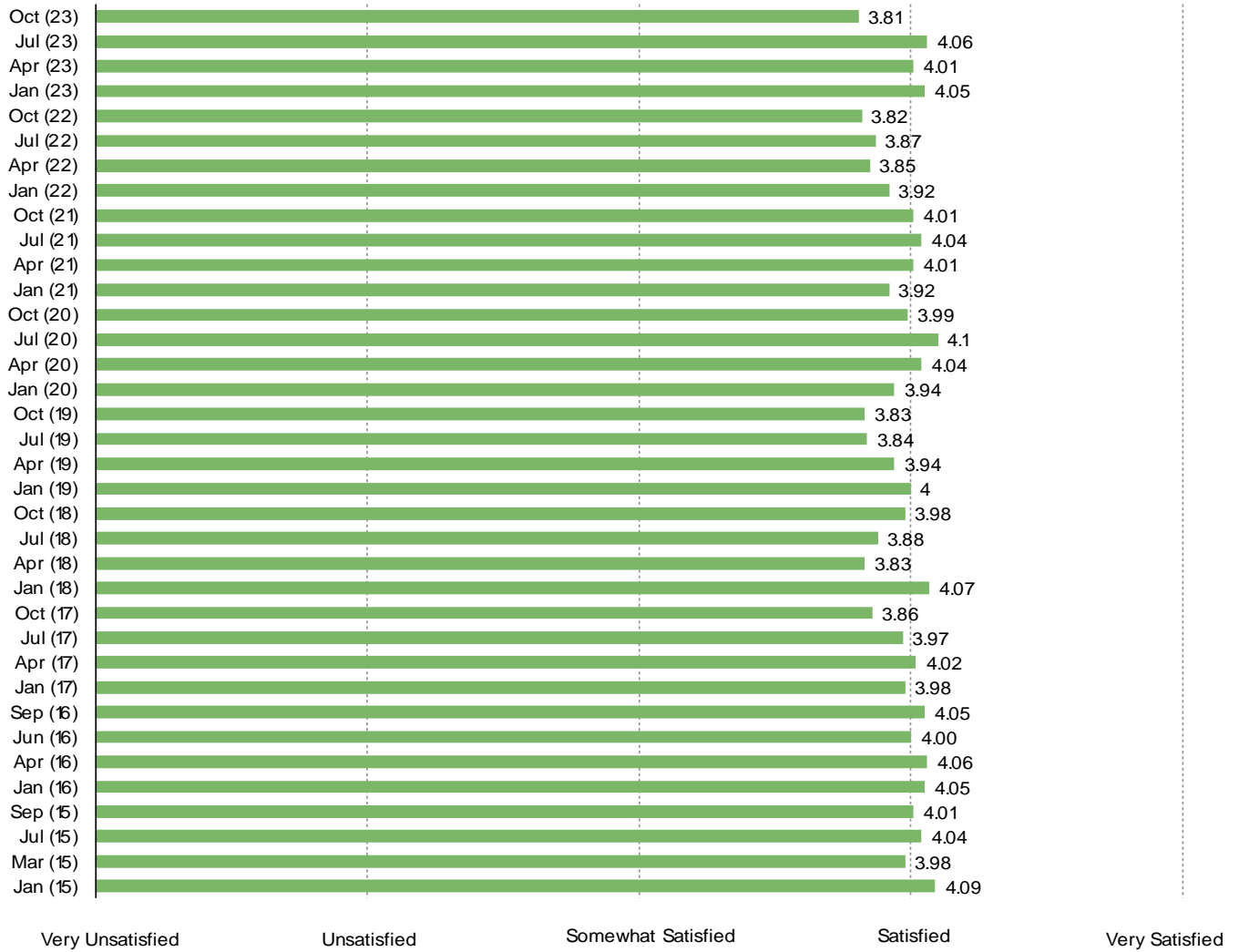
Posed to Netflix subscribers.



NETFLIX PRICING POWER

SATISFACTION WITH THE VALUE THEY RECEIVE FOR THE MONEY WITH NETFLIX

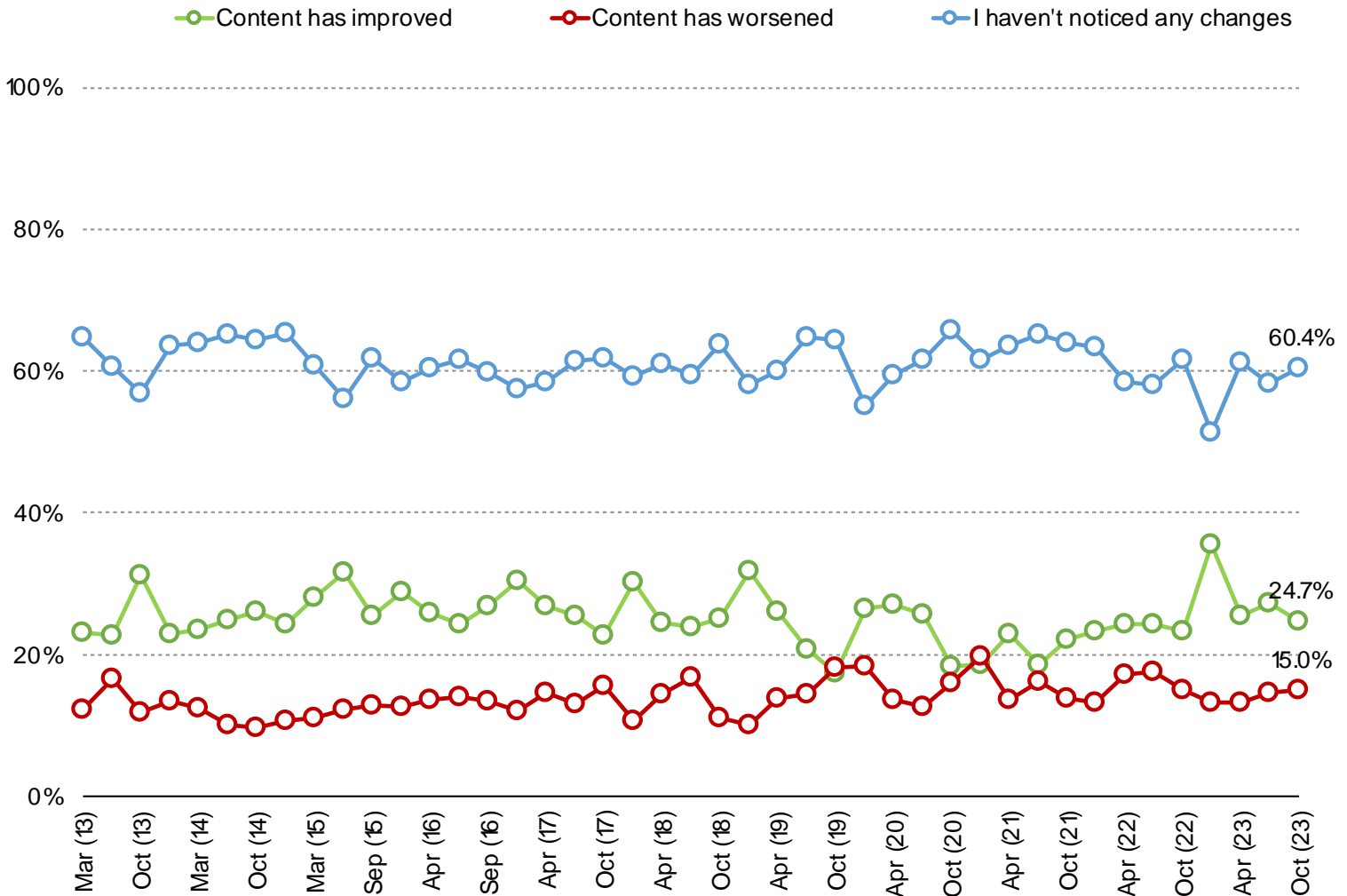
Posed to Netflix subscribers.



NETFLIX CONTENT

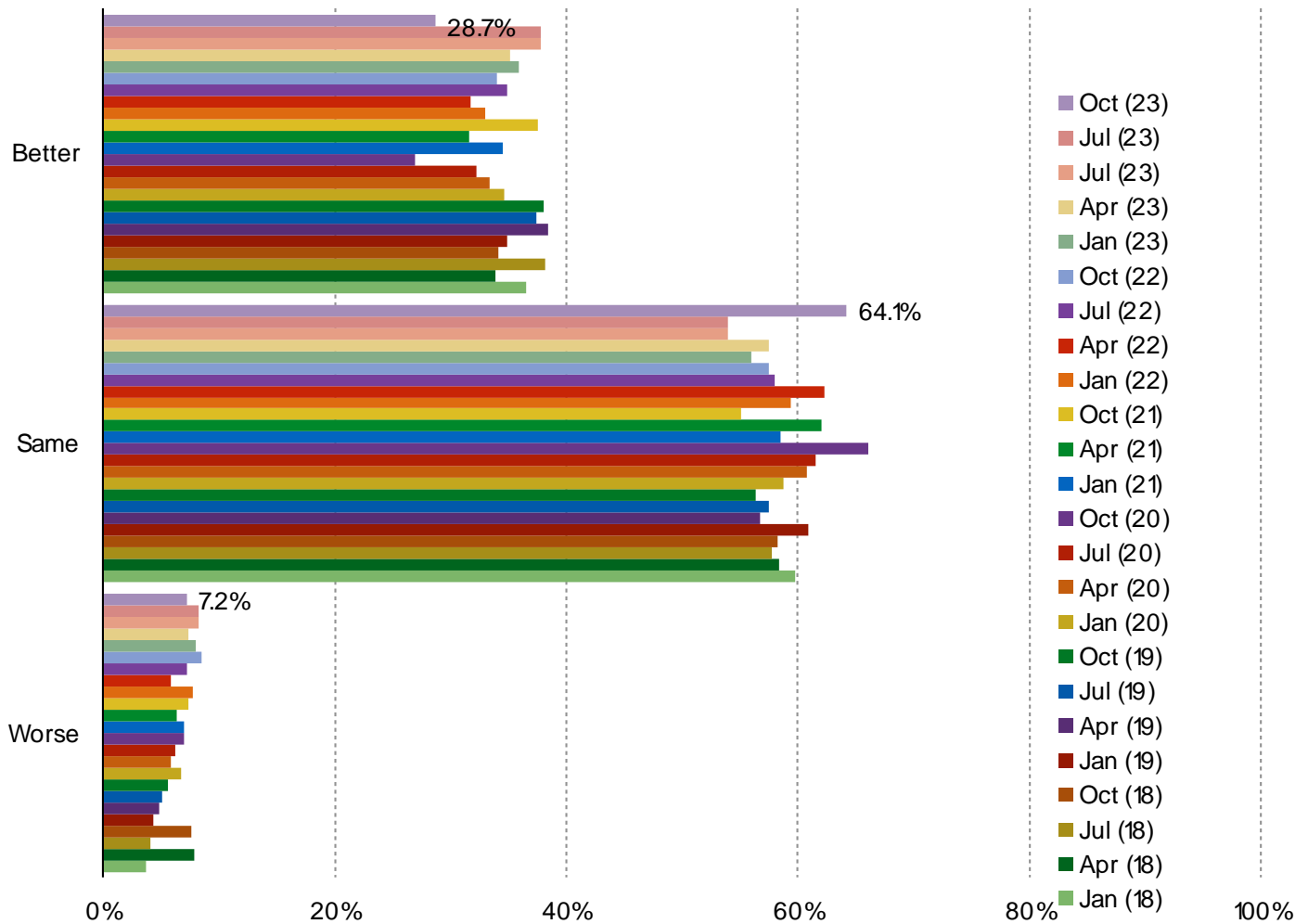
HAVE YOU NOTICED ANY CHANGES TO NETFLIX'S CONTENT OVER THE LAST SIX MONTHS?

Posed to Netflix subscribers.



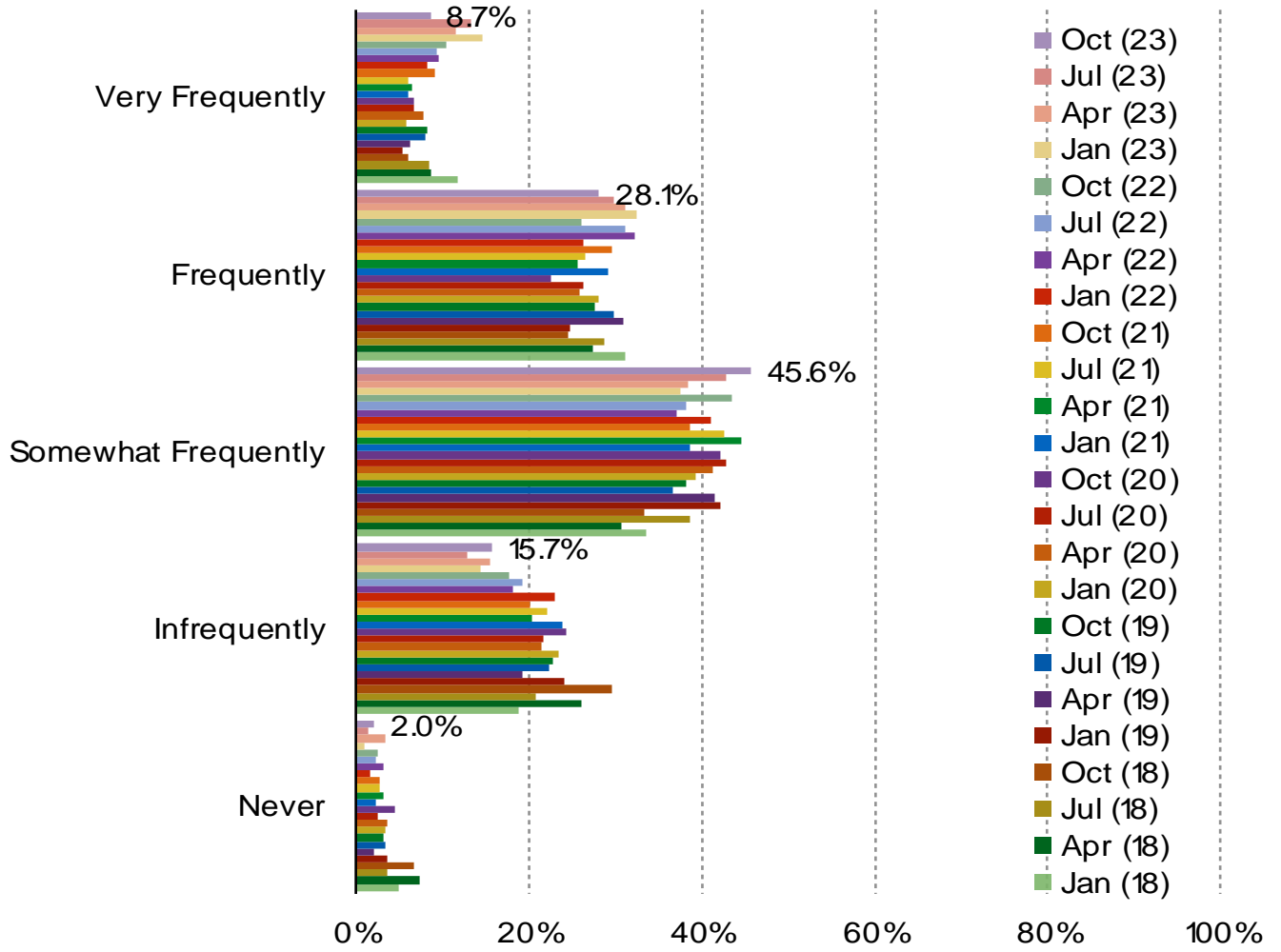
HOW DO YOU COMPARE NETFLIX ORIGINAL CONTENT SHOWS AGAINST SHOWS YOU VIEW ON OTHER NETWORKS OR SERVICES?

Posed to Netflix subscribers.



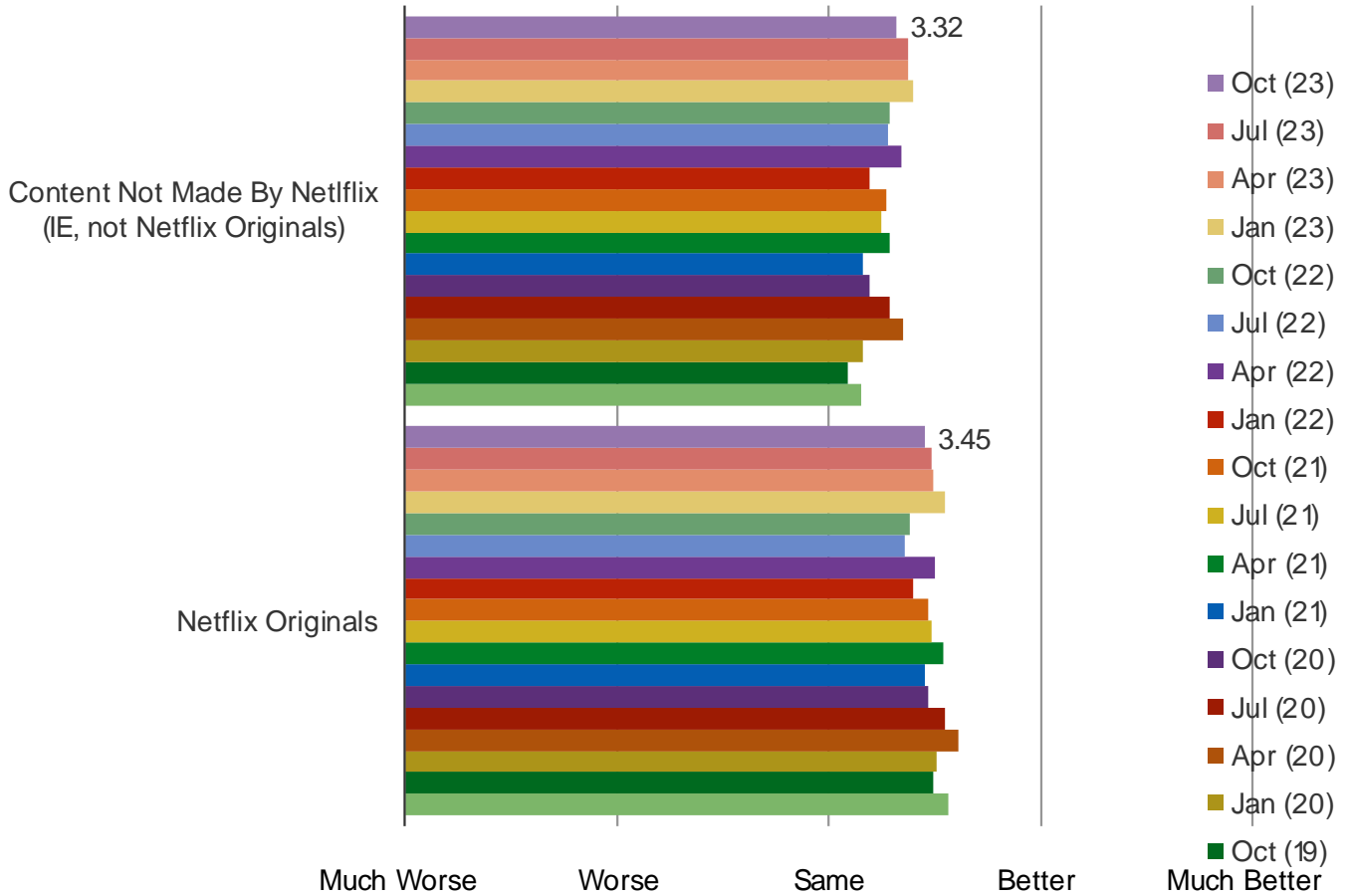
HOW OFTEN DO YOU WATCH NETFLIX ORIGINAL CONTENT SHOWS?

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?

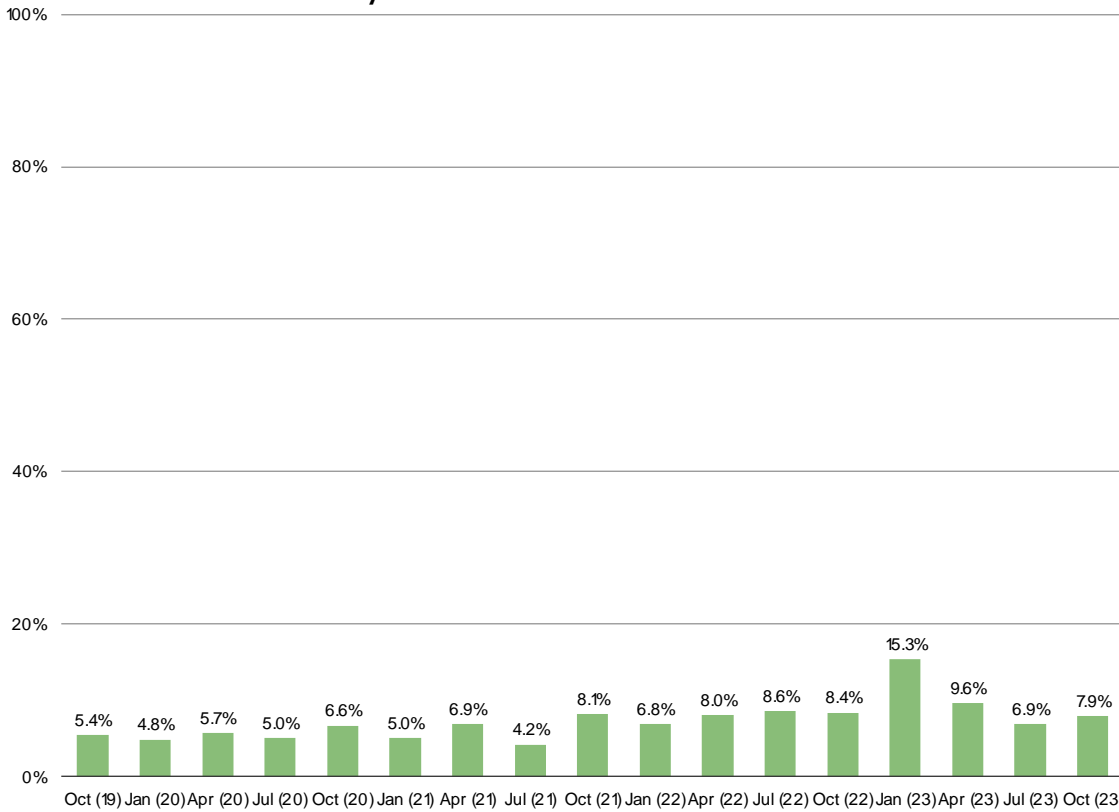
Posed to Netflix subscribers.



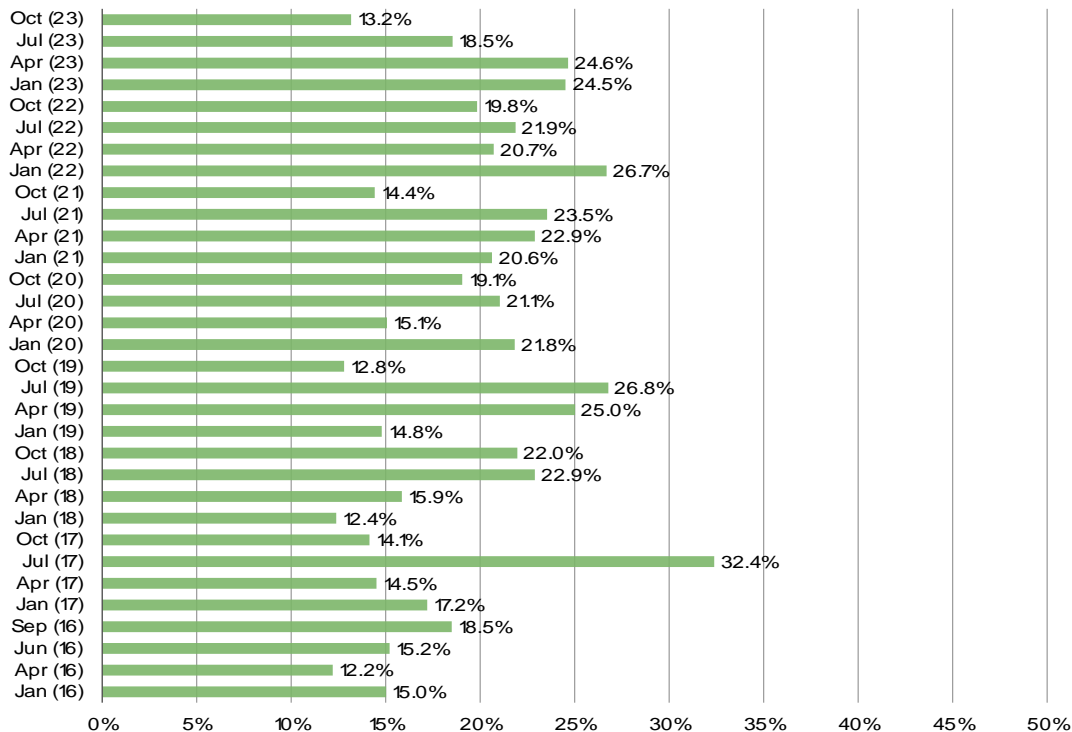
CYCLING IN AND OUT OF NETFLIX

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.



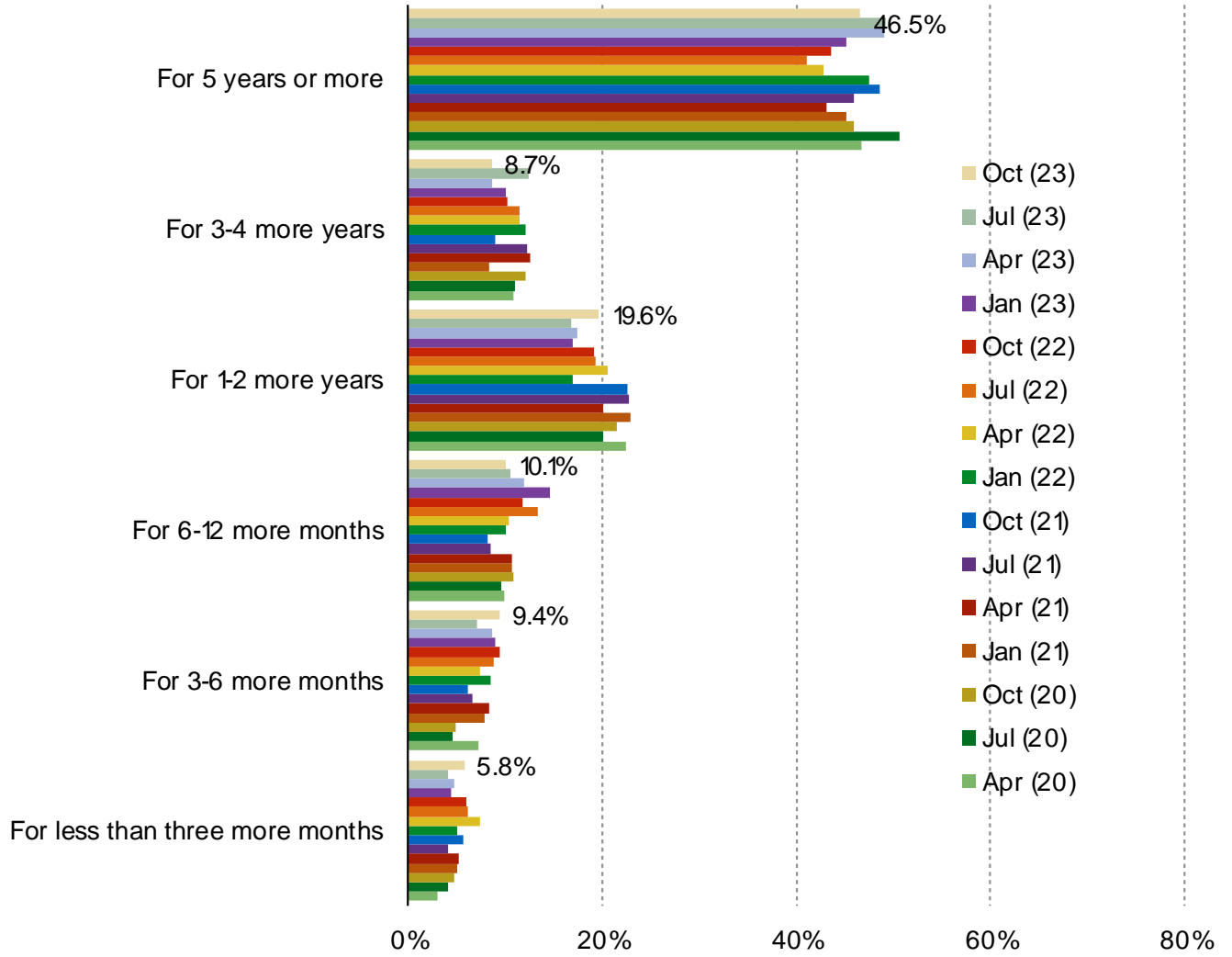
Posed to respondents who are not current Netflix subscribers but have been in the past.



NFLX CHURN

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.

