

Bespoke Survey Research

April 2024

Streaming Video

Volume 19 | Quarterly Survey

800+ Consumers in India (respondents skew more urban)

Tickers Covered: NFLX, DIS.

Key Takeaways:

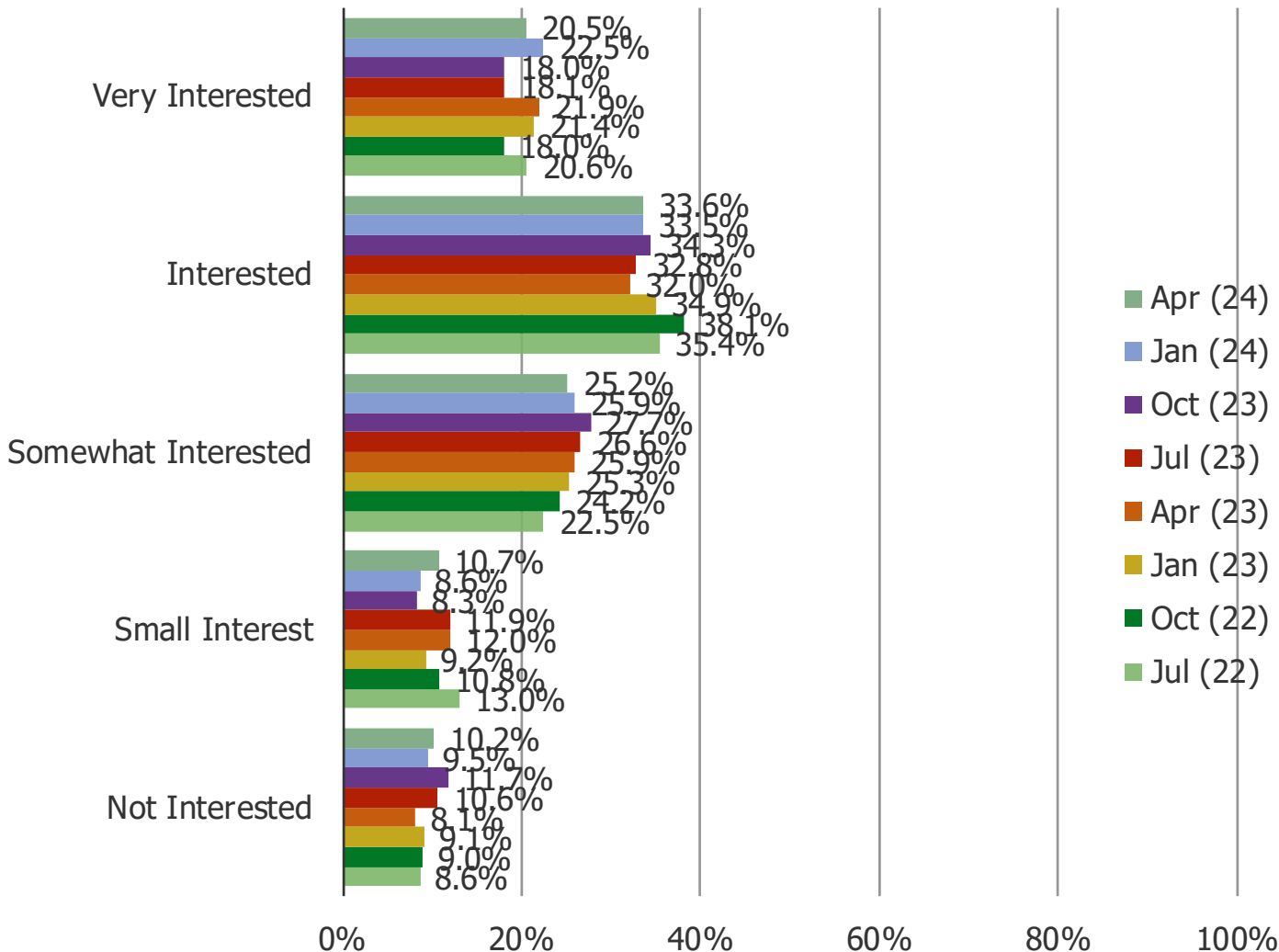
- ❑ The share of consumers who typically watch TV shows and movies via streaming video services has increased considerably.
- ❑ The number of streaming video services that consumers in India use has increased over time.
- ❑ Netflix is one of the most recognized streaming platforms in terms of awareness in India (aided and unaided awareness).
- ❑ The share of consumers who say they have a Netflix account increased q/q, and is just a touch behind series highs.
- ❑ Our survey has shown a shift in recent quarters among Netflix subscribers from the mobile only plan to higher tiers.
- ❑ The share of Netflix subscribers who subscribed in the past month and past year has been declining, while the share of subscribers who signed up more than a year ago has been increasing.
- ❑ Netflix engagement among subscribers is strong, with self-reported hours per month and general watching frequency KPIs improving.

Netflix India

AD-SUPPORTED TIER INTEREST

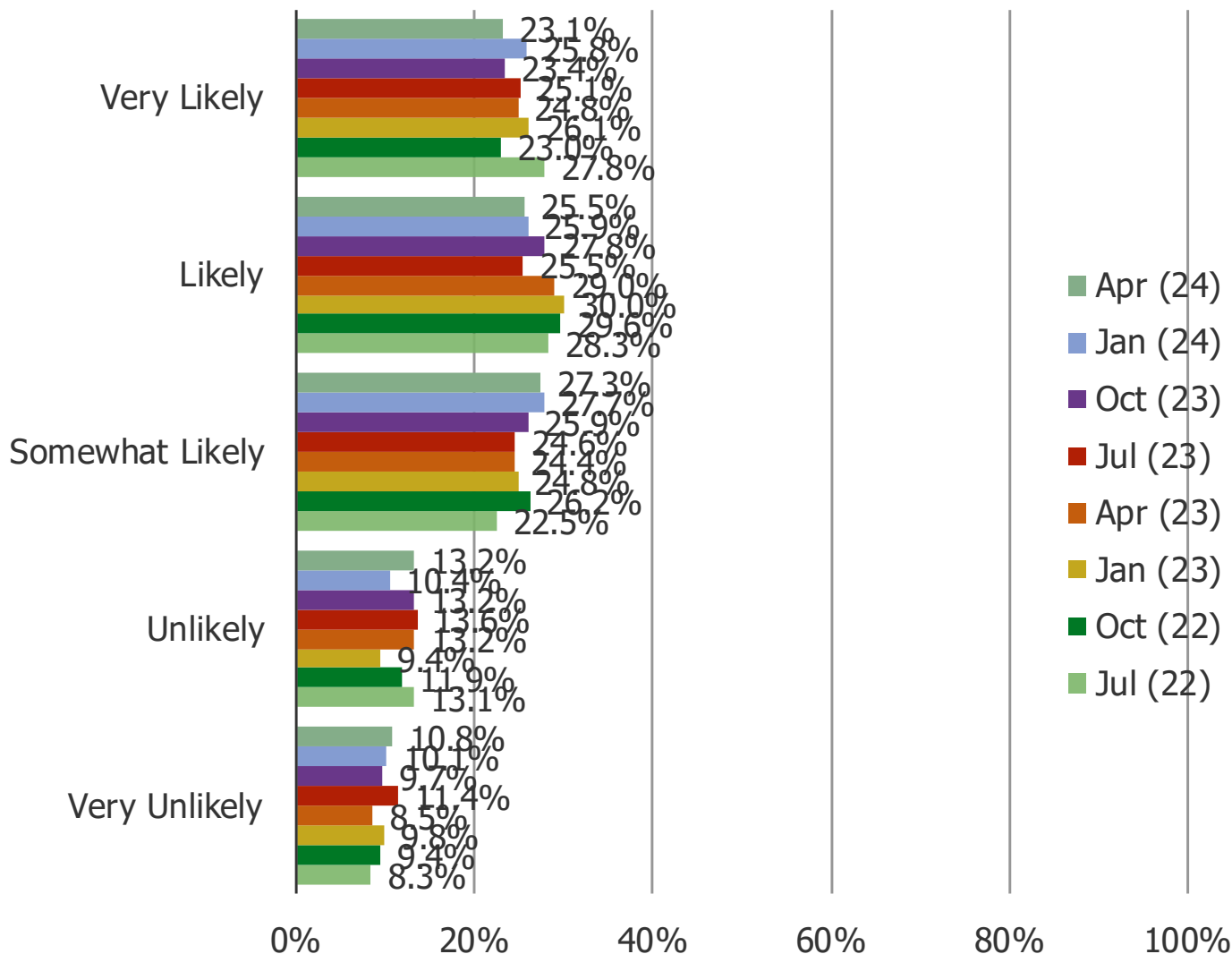
HOW MUCH WILL YOU BE INTERESTED IN THE AD SUPPORTED VERSION OF NETFLIX AT A LOW PRICE?

Posed to all respondents.



HOW LIKELY WOULD YOU BE TO SIGN UP FOR AN AD-SUPPORTED VERSION OF NETFLIX AT A LOWER PRICE?

Posed to all respondents.

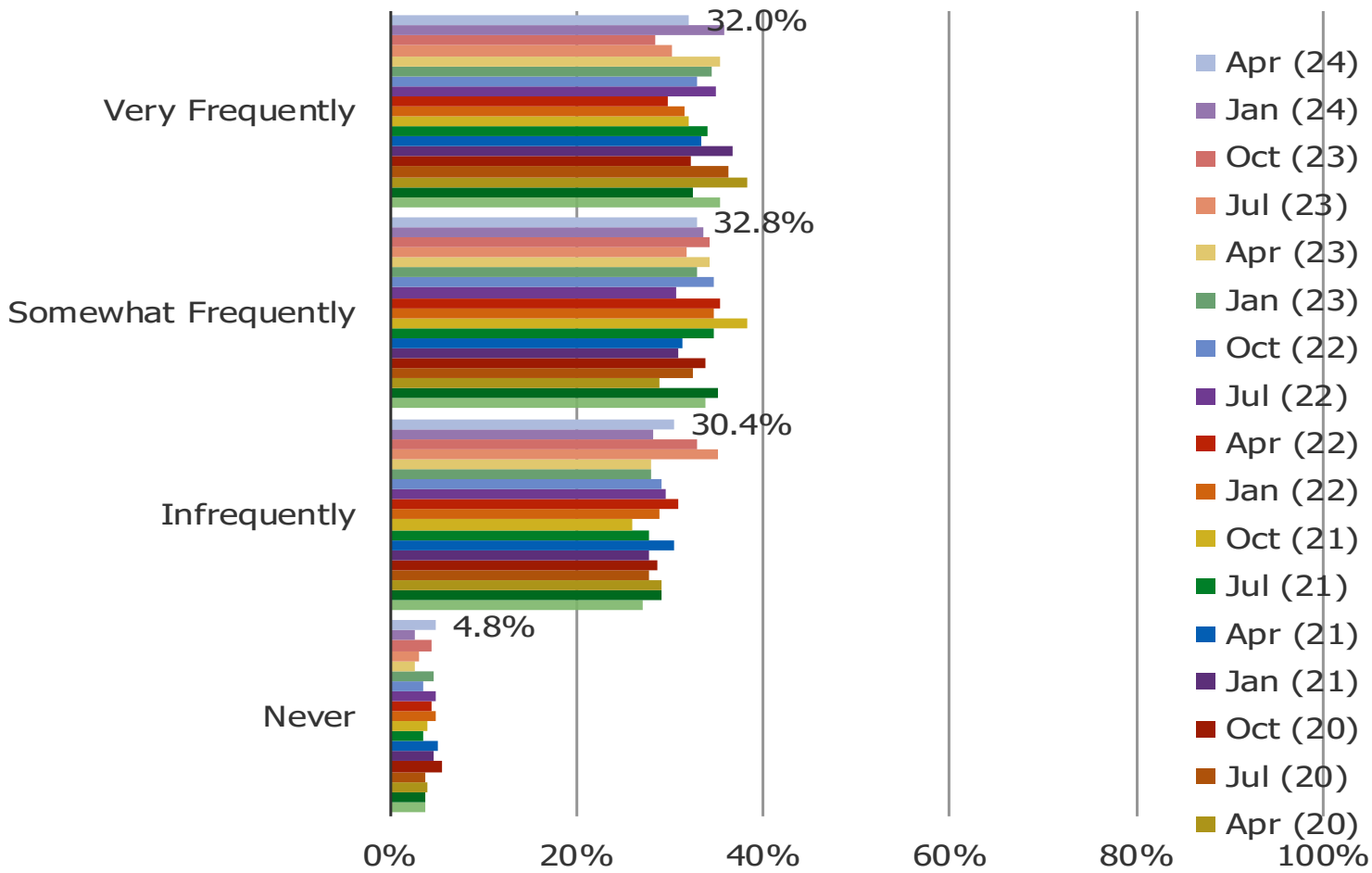


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TV/MOVIE WATCHING

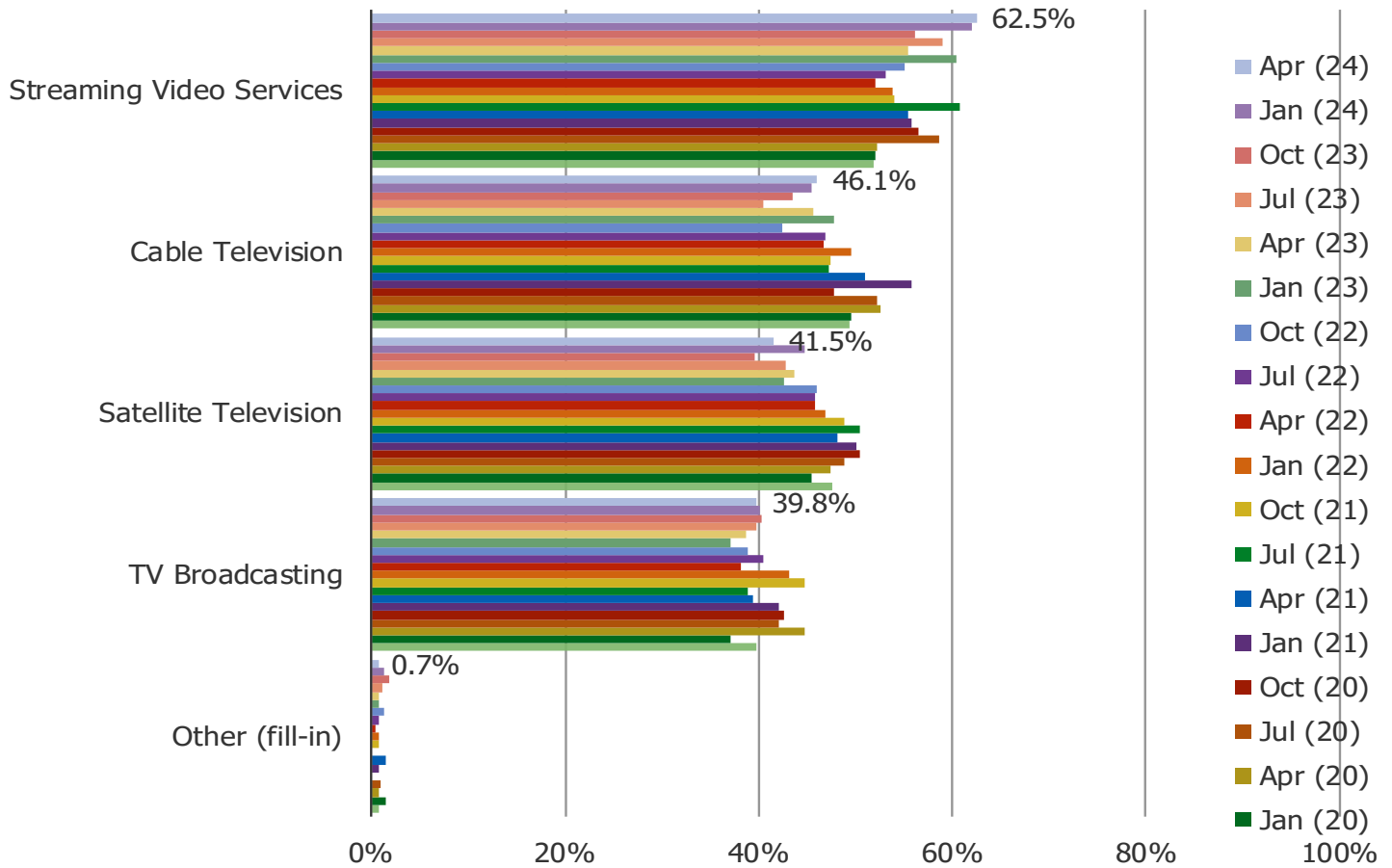
HOW OFTEN DO YOU WATCH TELEVISION OR MOVIES?

Posed to all respondents



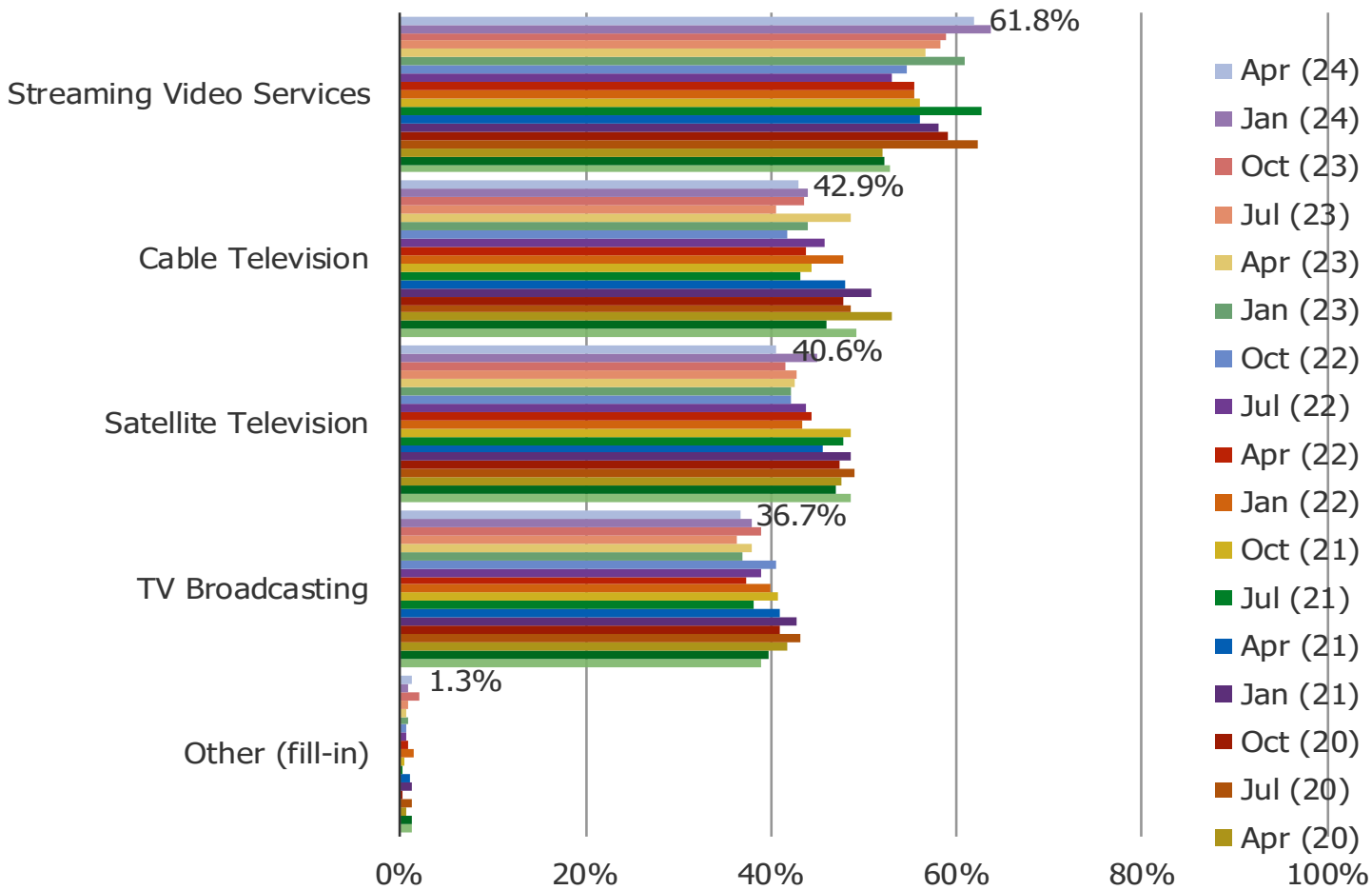
HOW DO YOU USUALLY WATCH TELEVISION SHOWS? (SELECT ALL THAT APPLY)

Posed to respondents who watch TV or movies



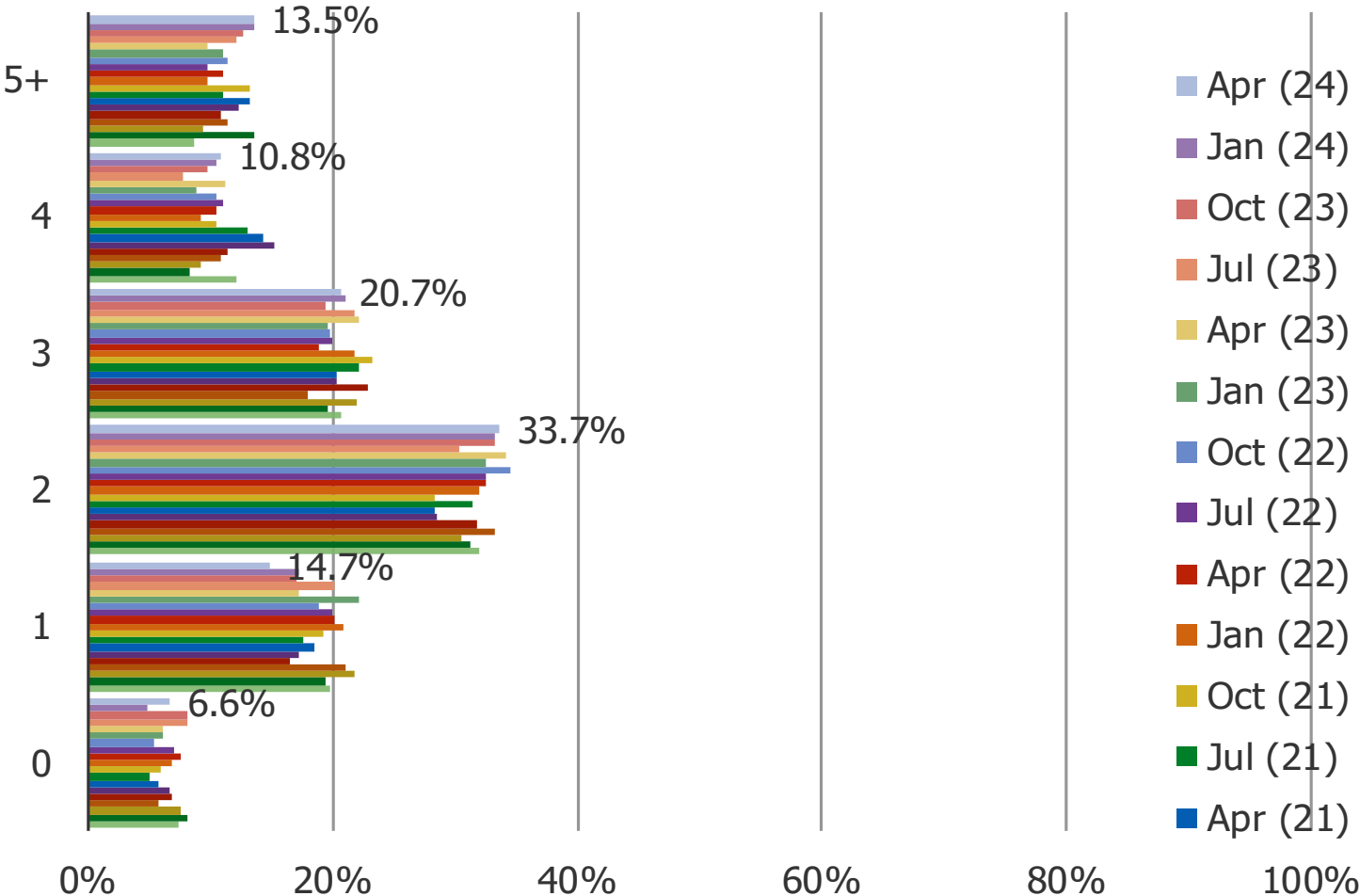
HOW DO YOU USUALLY WATCH MOVIES? (SELECT ALL THAT APPLY)

Posed to respondents who watch TV or movies



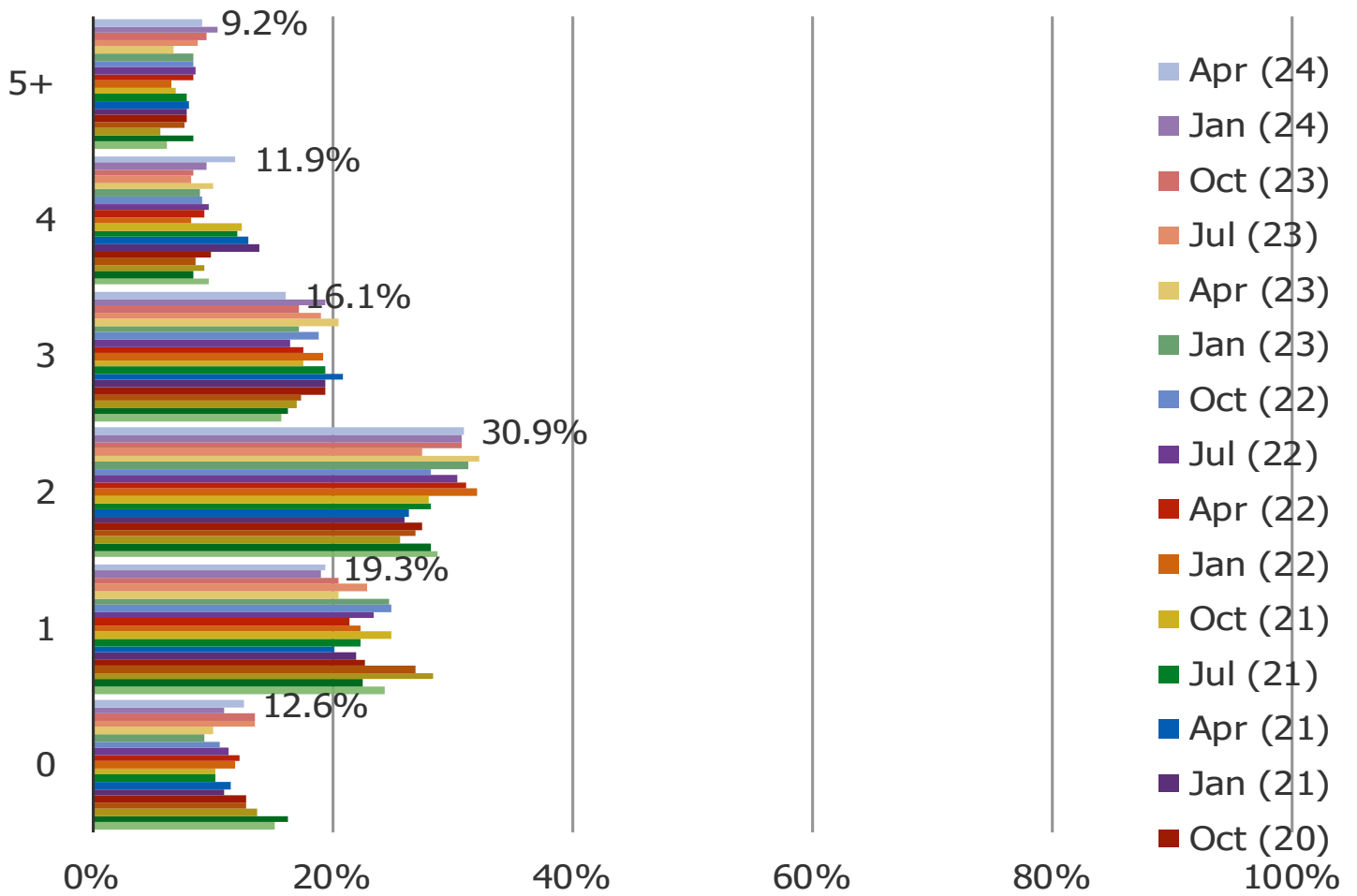
HOW MANY STREAMING VIDEO SERVICES DO YOU CURRENTLY USE?

Posed to all respondents



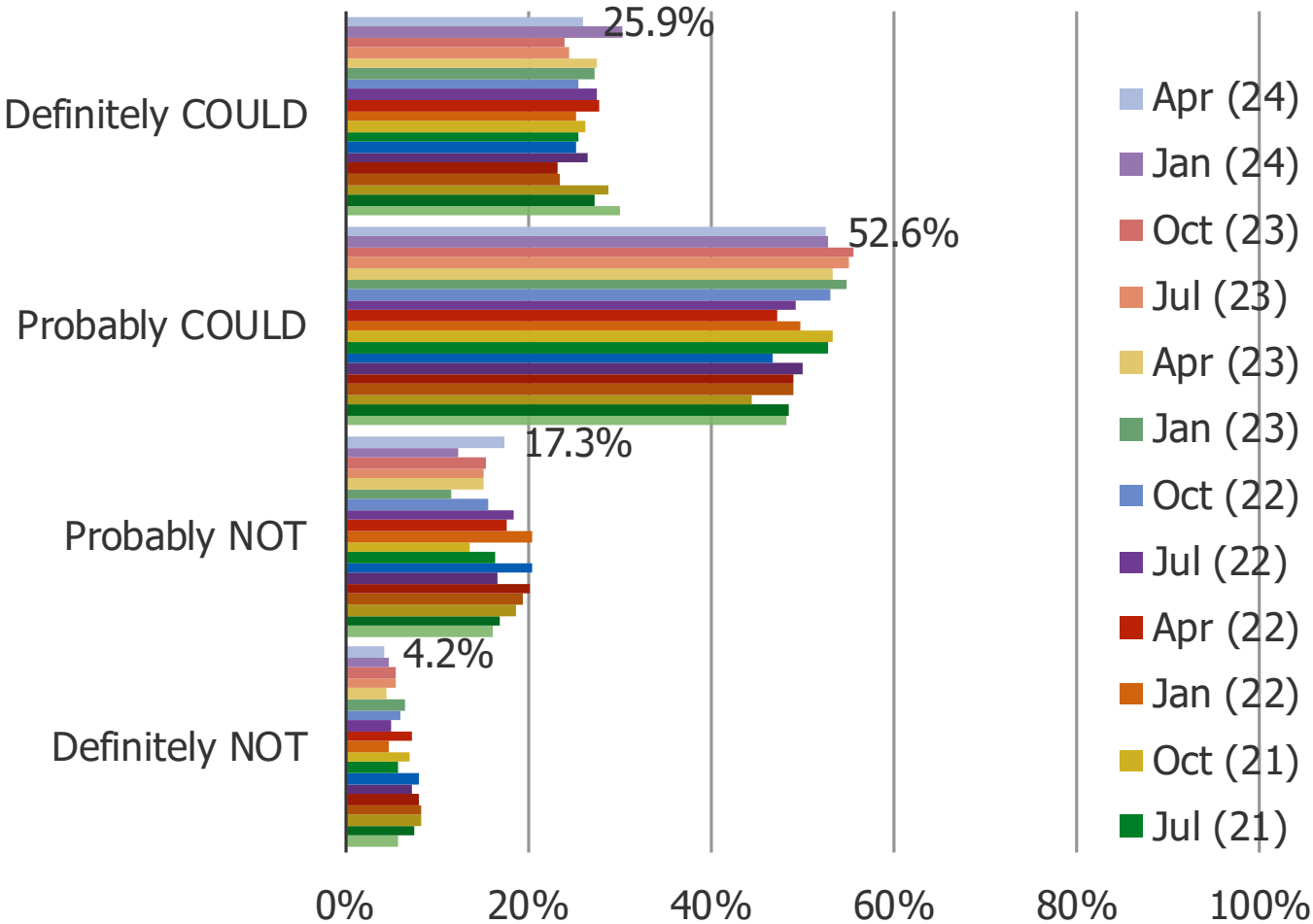
HOW MANY STREAMING VIDEO SERVICES DO YOU CURRENTLY PAY FOR?

Posed to all respondents



CAN YOU AFFORD TO ADD ANOTHER PAID VIDEO SERVICE RIGHT NOW?

Posed to respondents who pay for video streaming services themselves

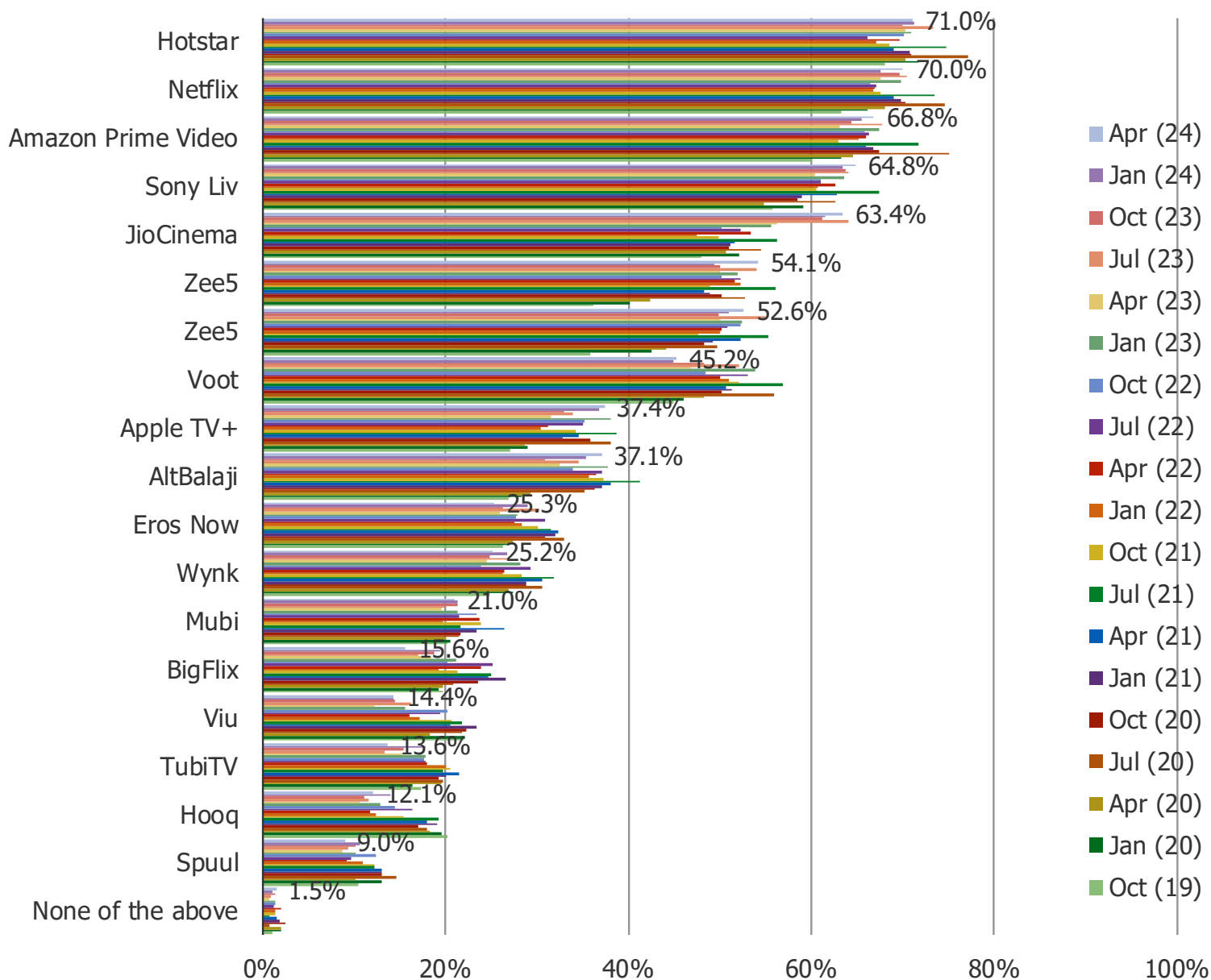


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STREAMING VIDEO AWARENESS AND ACCOUNT HOLDERS

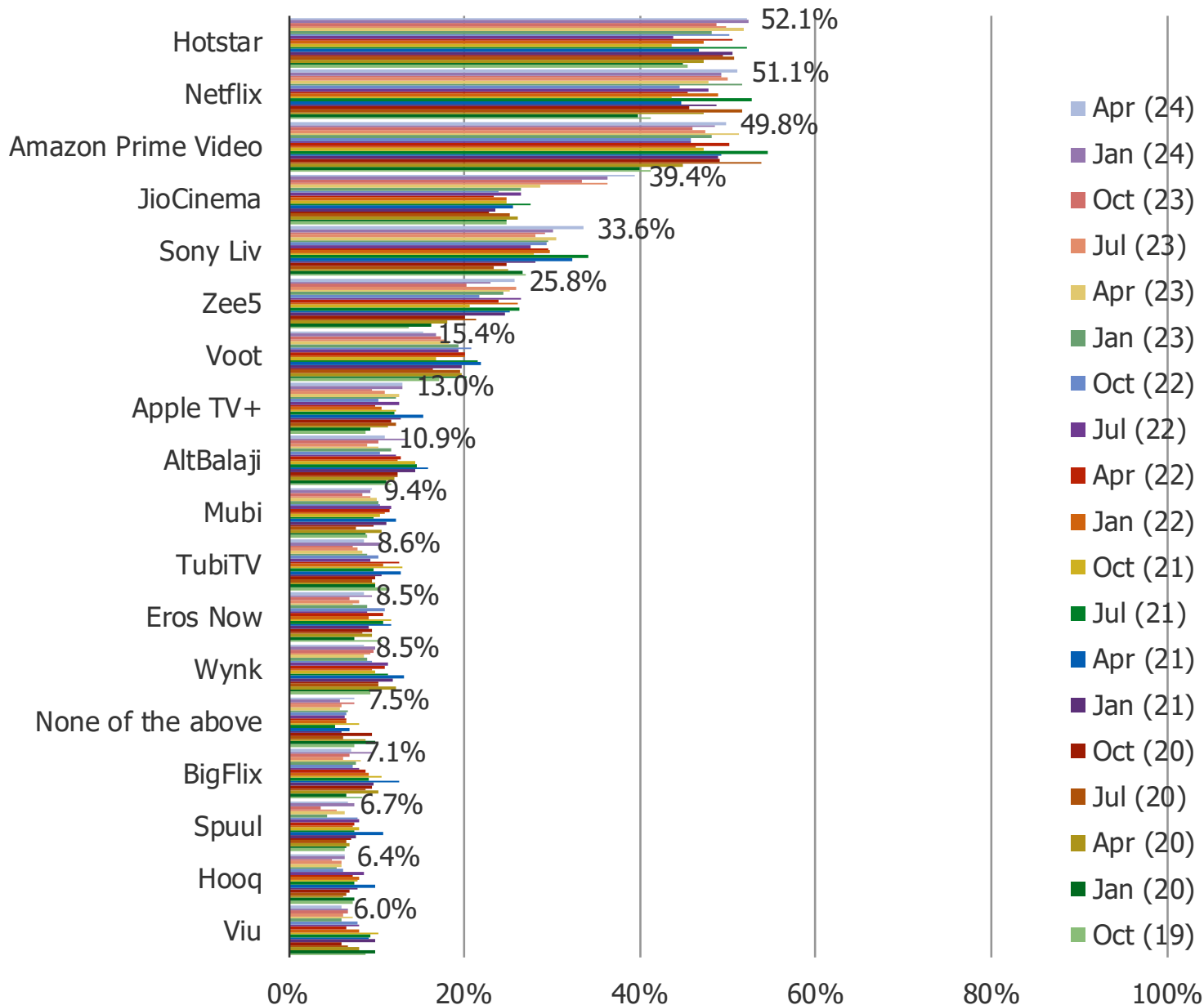
WHICH OF THE FOLLOWING STREAMING VIDEO SERVICES HAVE YOU HEARD OF?

Posed to all respondents



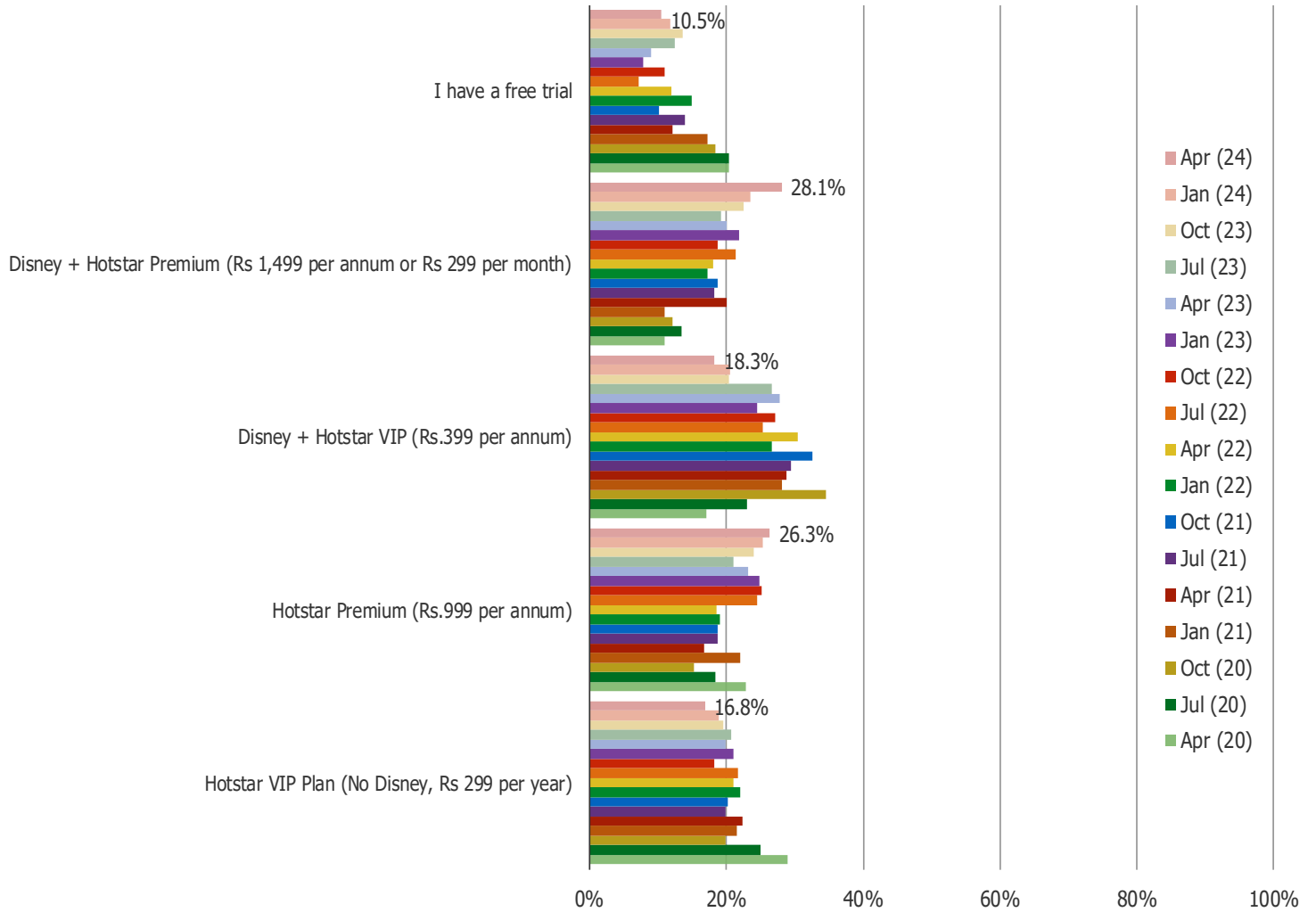
DO YOU CURRENTLY HAVE AN ACCOUNT WITH ANY OF THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents



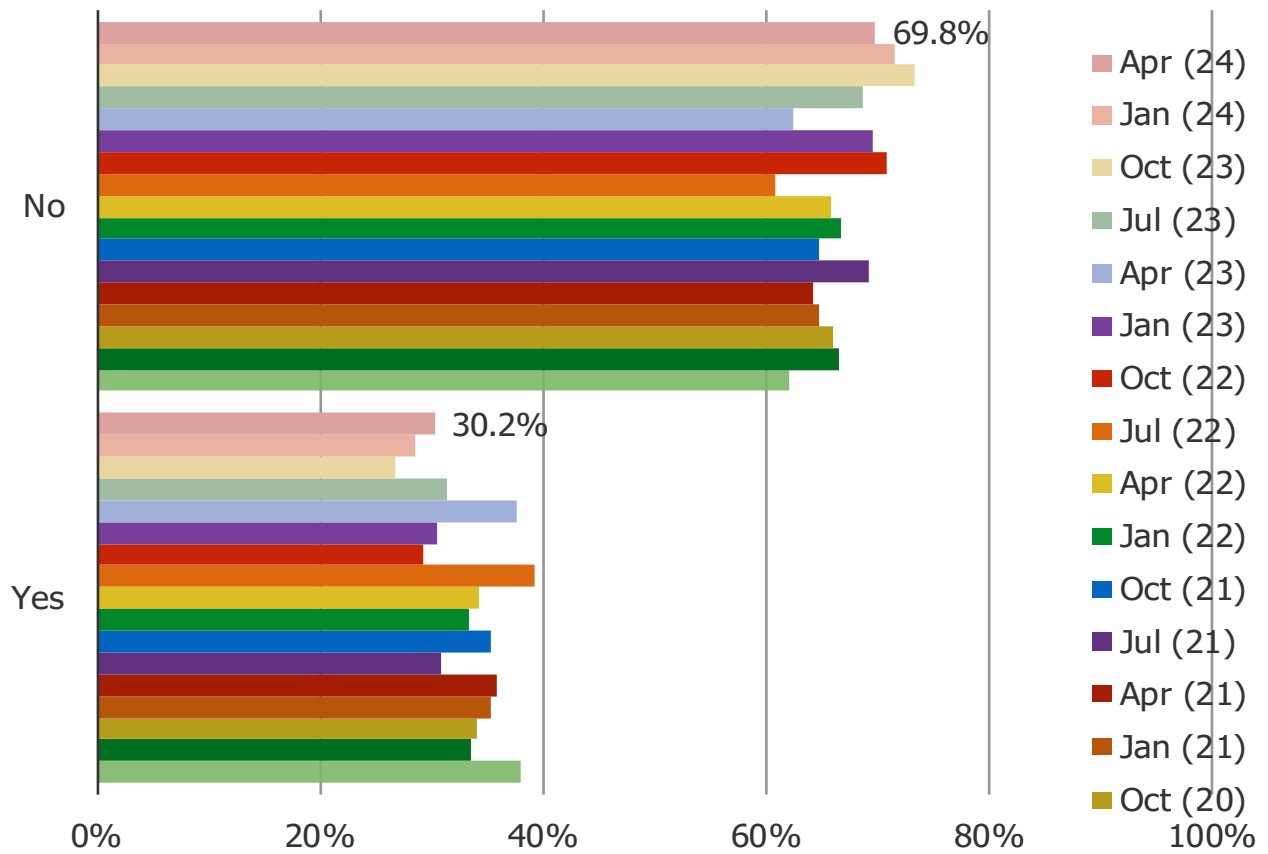
WHICH OF THE FOLLOWING HOTSTAR PLANS DO YOU CURRENTLY HAVE?

Posed to Hotstar subscribers



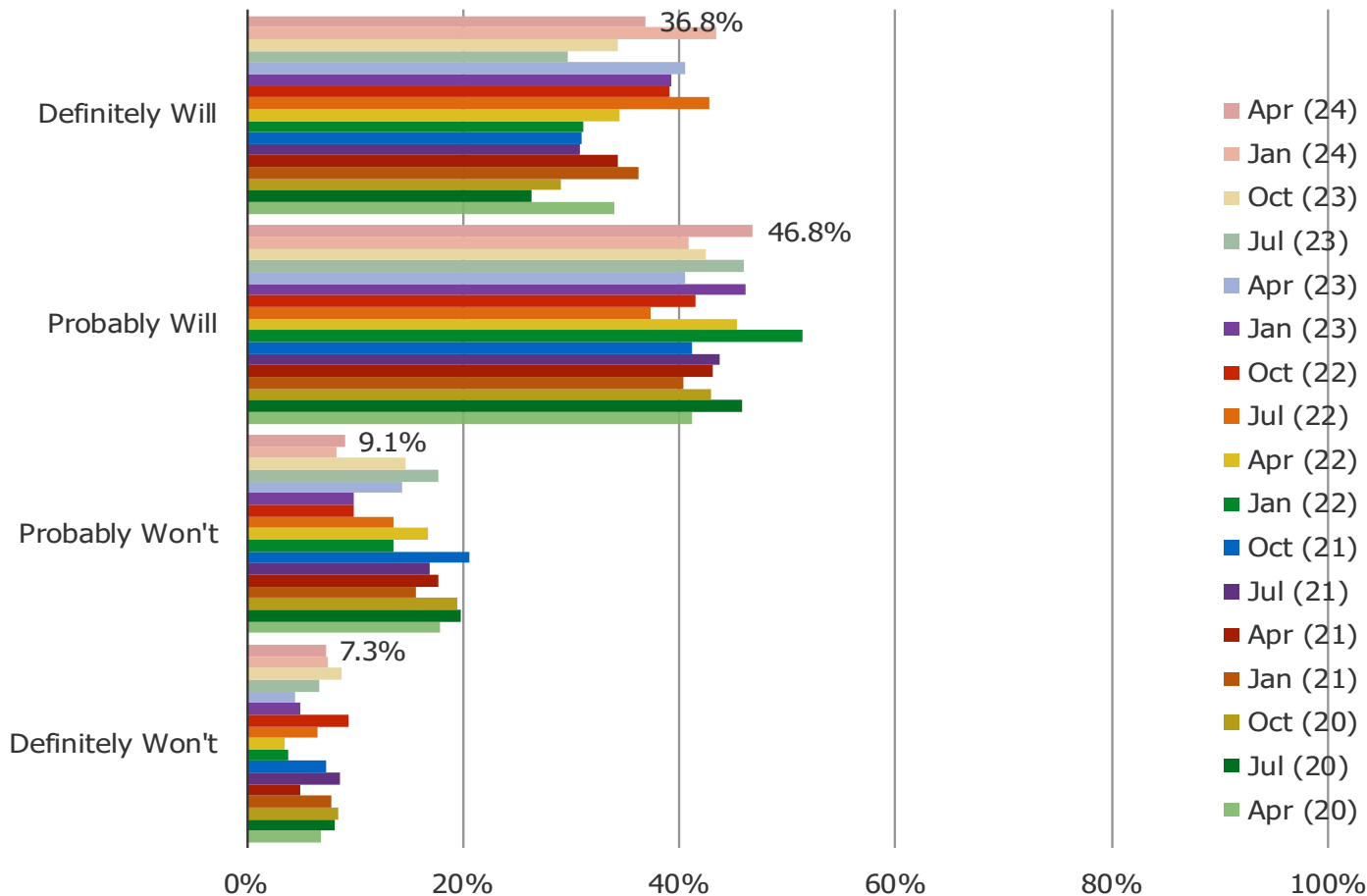
ARE YOU CONSIDERING UNSUBSCRIBING FROM HOTSTAR IN THE NEXT FEW MONTHS?

Posed to Hotstar subscribers



IN THE NEXT THREE MONTHS, HOW LIKELY WILL YOU PAY FOR DISNEY+?

Posed to Hotstar subscribers without Disney+ as part of their plan

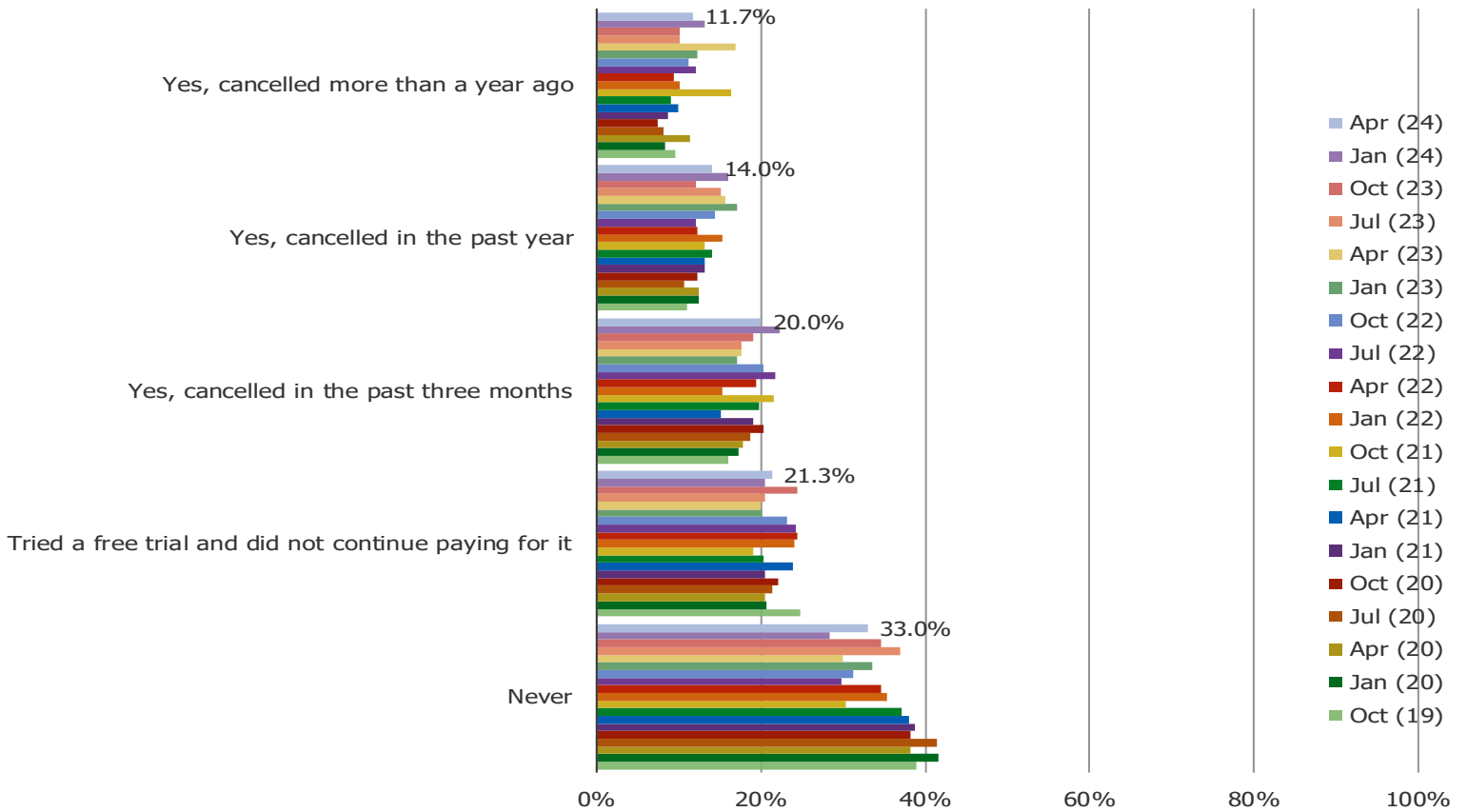


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NON-NETFLIX SUBSCRIBERS

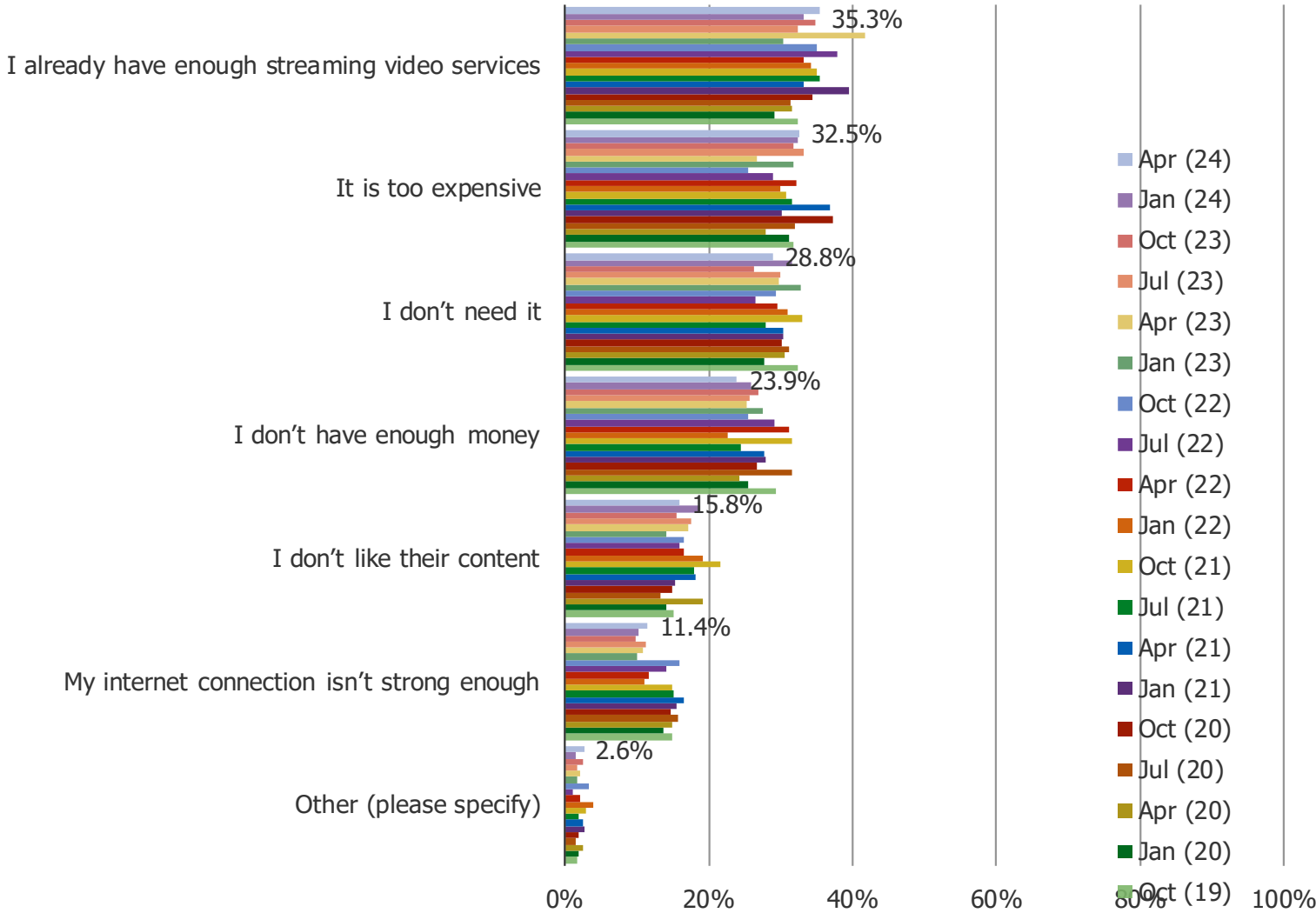
HAVE YOU EVER PAID TO SUBSCRIBE TO NETFLIX IN THE PAST?

Posed to non-Netflix subscribers



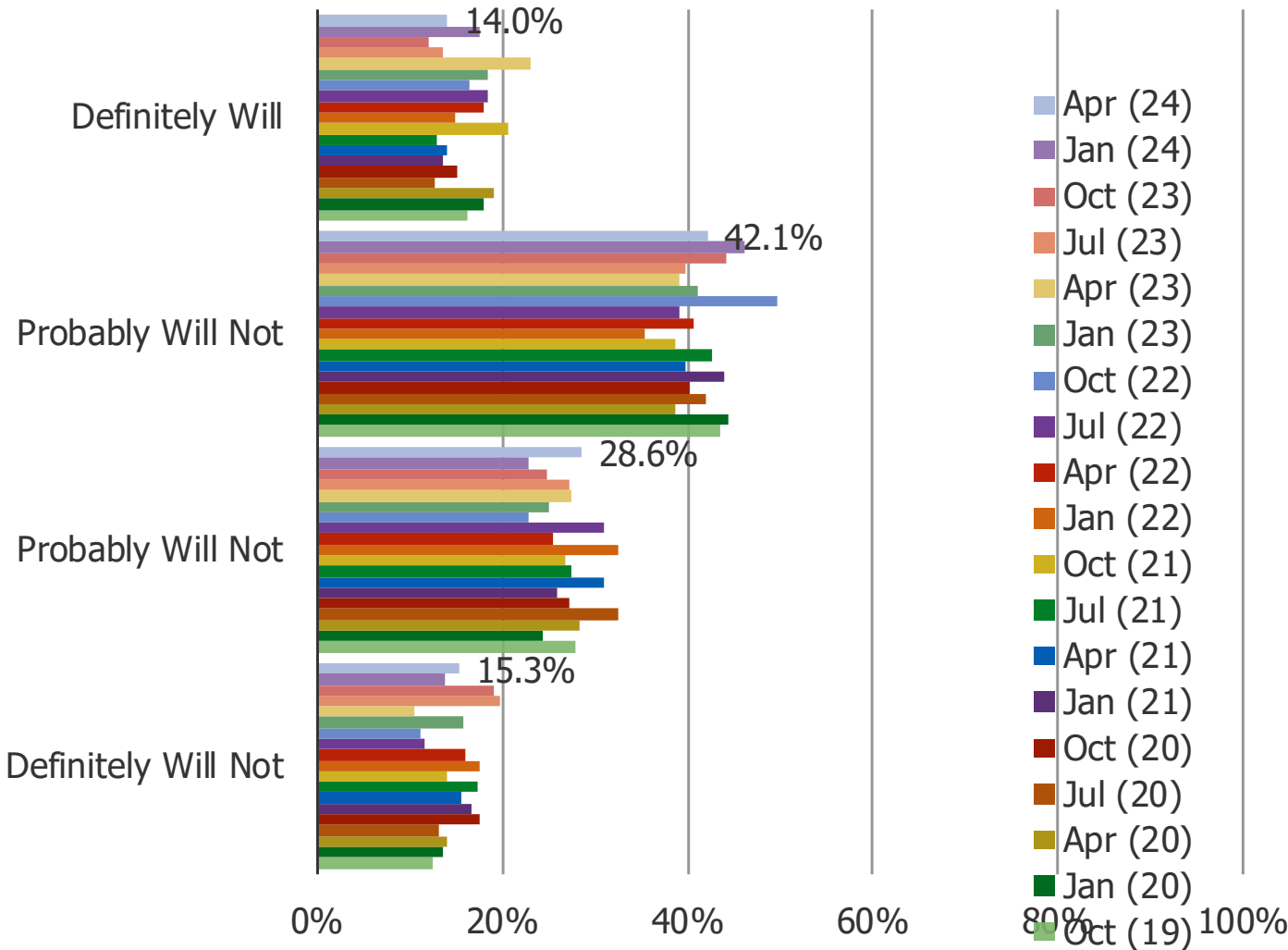
WHY ARE YOU CURRENTLY NOT A NETFLIX SUBSCRIBER? (SELECT ALL THAT APPLY)

Posed to non-Netflix subscribers



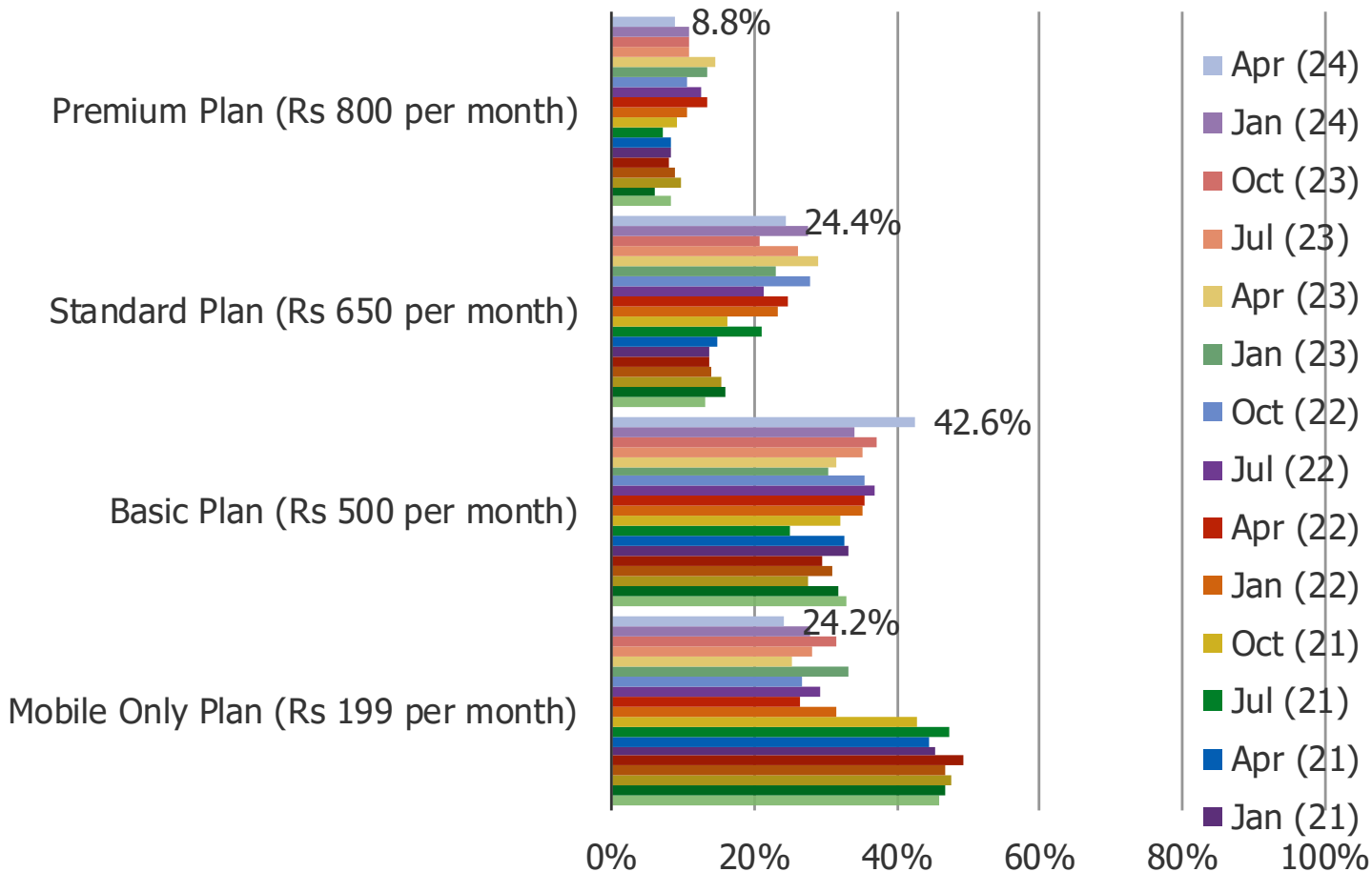
HOW LIKELY ARE YOU TO START AN ACCOUNT WITH NETFLIX IN THE NEXT THREE MONTHS?

Posed to non-Netflix subscribers



WHICH OF THE FOLLOWING PLANS WOULD YOU BE MOST LIKELY TO SIGN UP FOR?

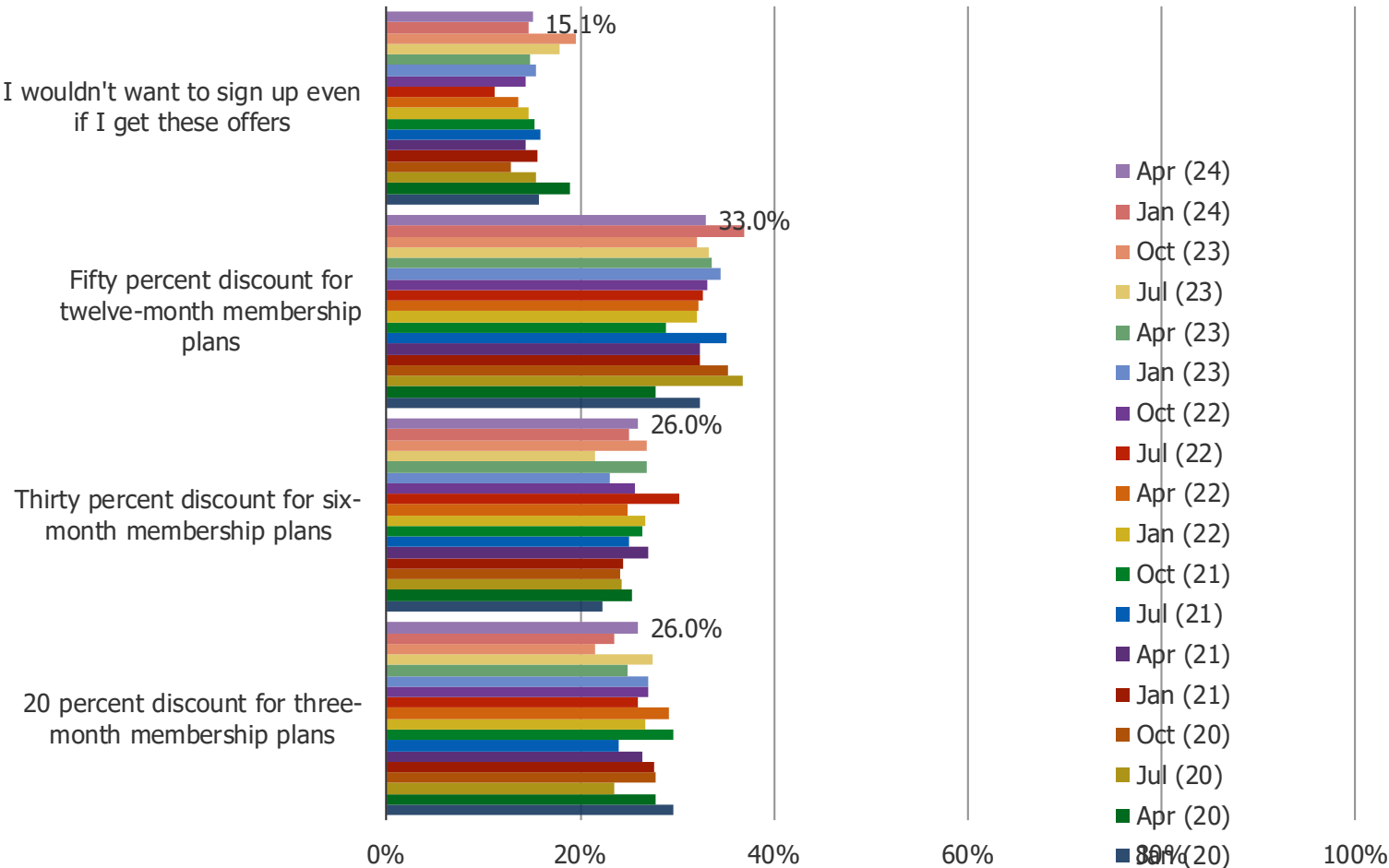
Posed to non-Netflix subscribers who probably / definitely will sign up.



*Note – prices were changed in the survey in January of 2022 to reflect the changed rates.

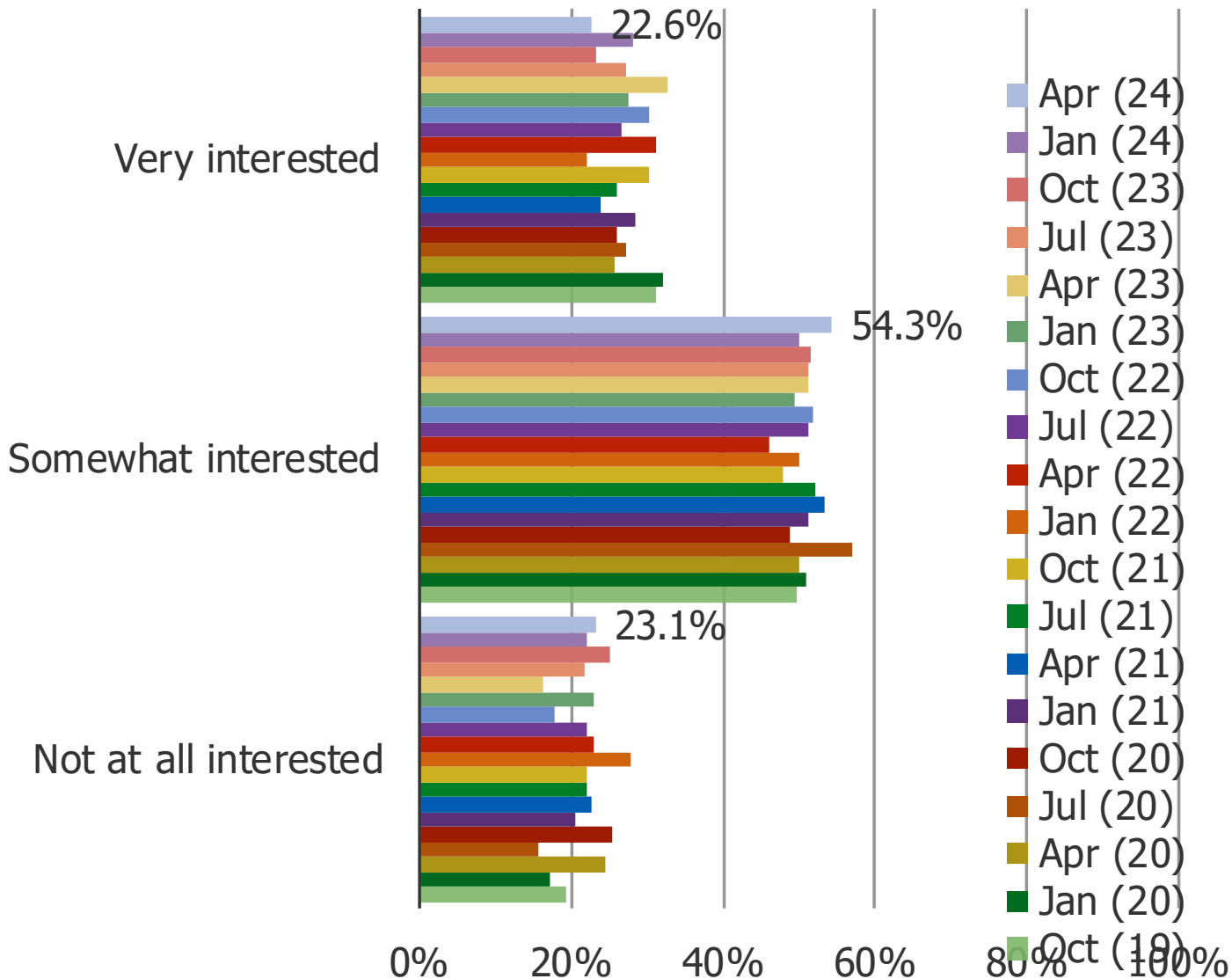
WOULD YOU PREFER TO SIGN UP FOR NETFLIX IF ANY OF THE FOLLOWING WAS OFFERED TO YOU?

Posed to non-Netflix subscribers.



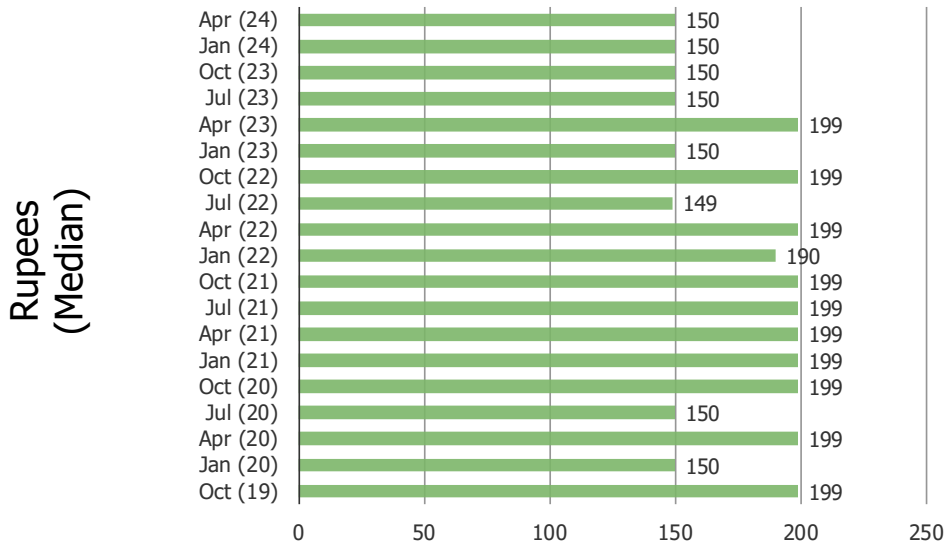
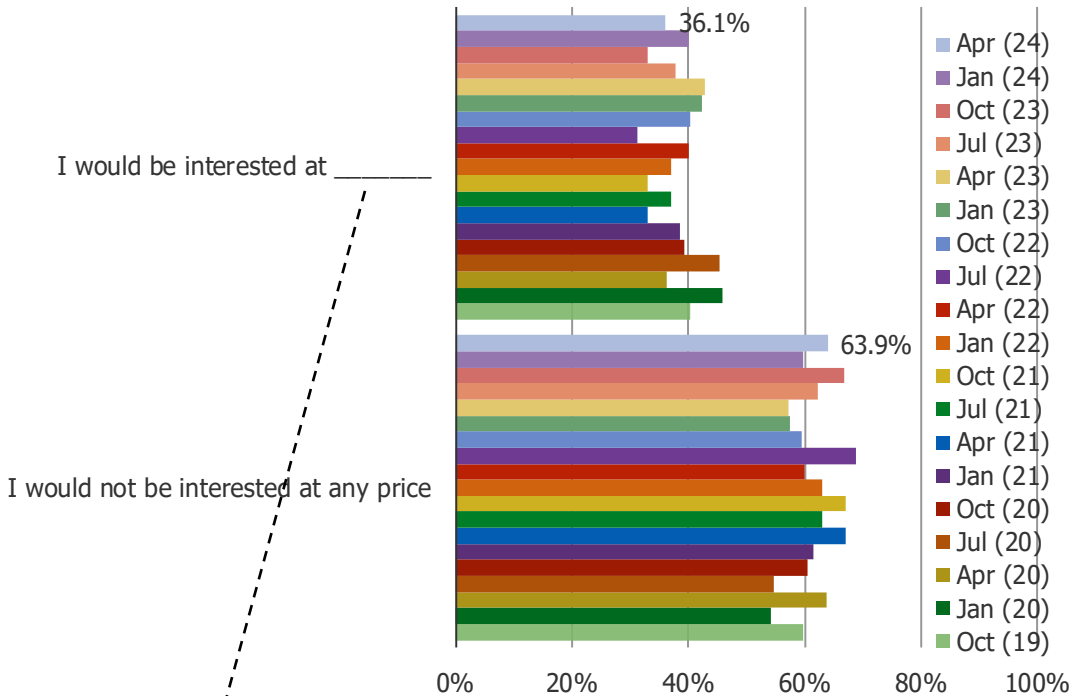
HOW INTERESTED ARE YOU IN CHECKING OUT FREE CONTENT FROM NETFLIX ON A LIMITED BASIS FOR THEIR SHOWS?

Posed to non-Netflix subscribers



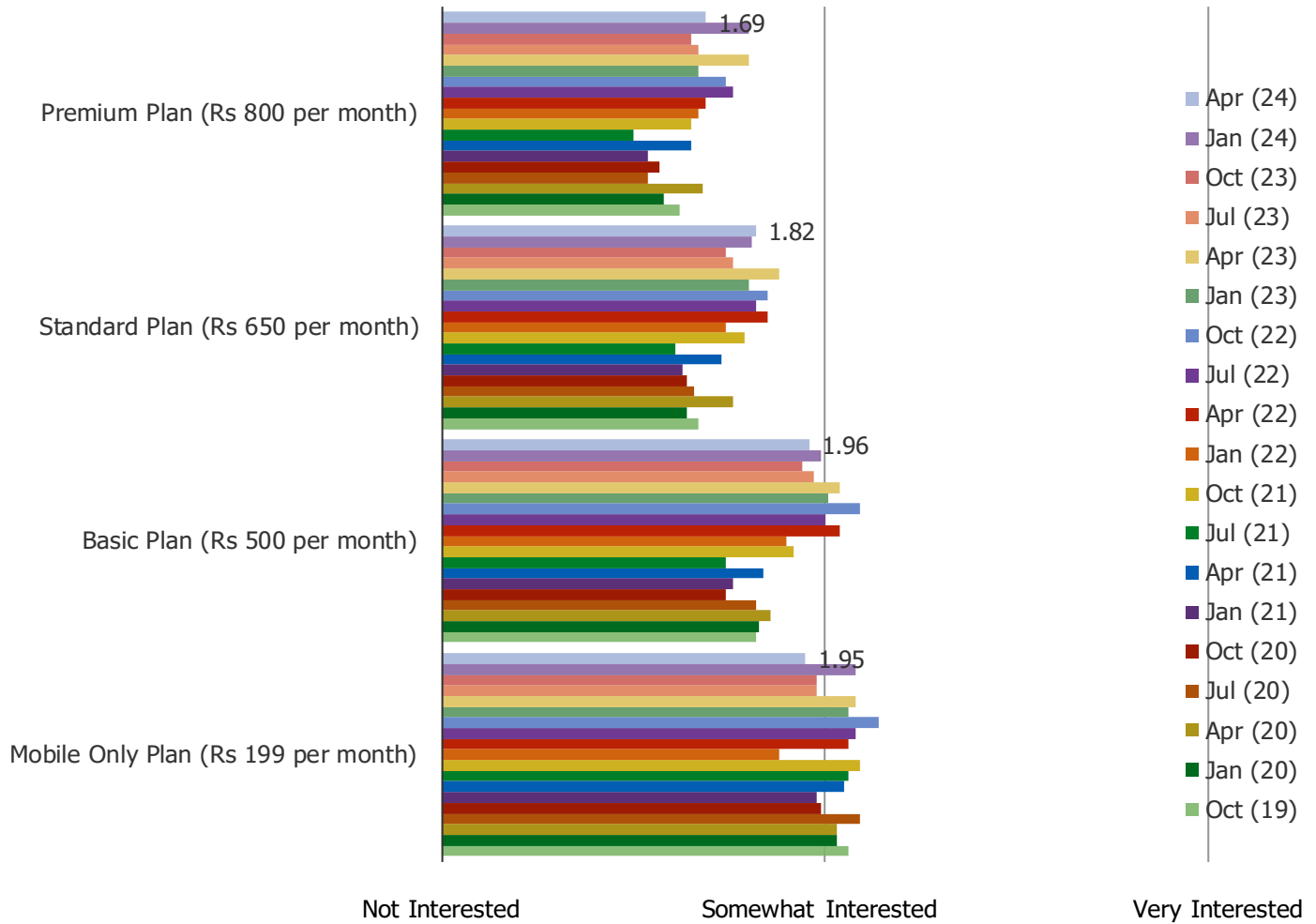
AT WHAT PRICE PER MONTH WOULD IT MAKE SENSE FOR YOU TO PAY FOR NETFLIX?

Posed to non-Netflix subscribers



HOW INTERESTED WOULD YOU BE IN SIGNING UP FOR NETFLIX AT THE FOLLOWING PRICE POINTS?

Posed to non-Netflix subscribers



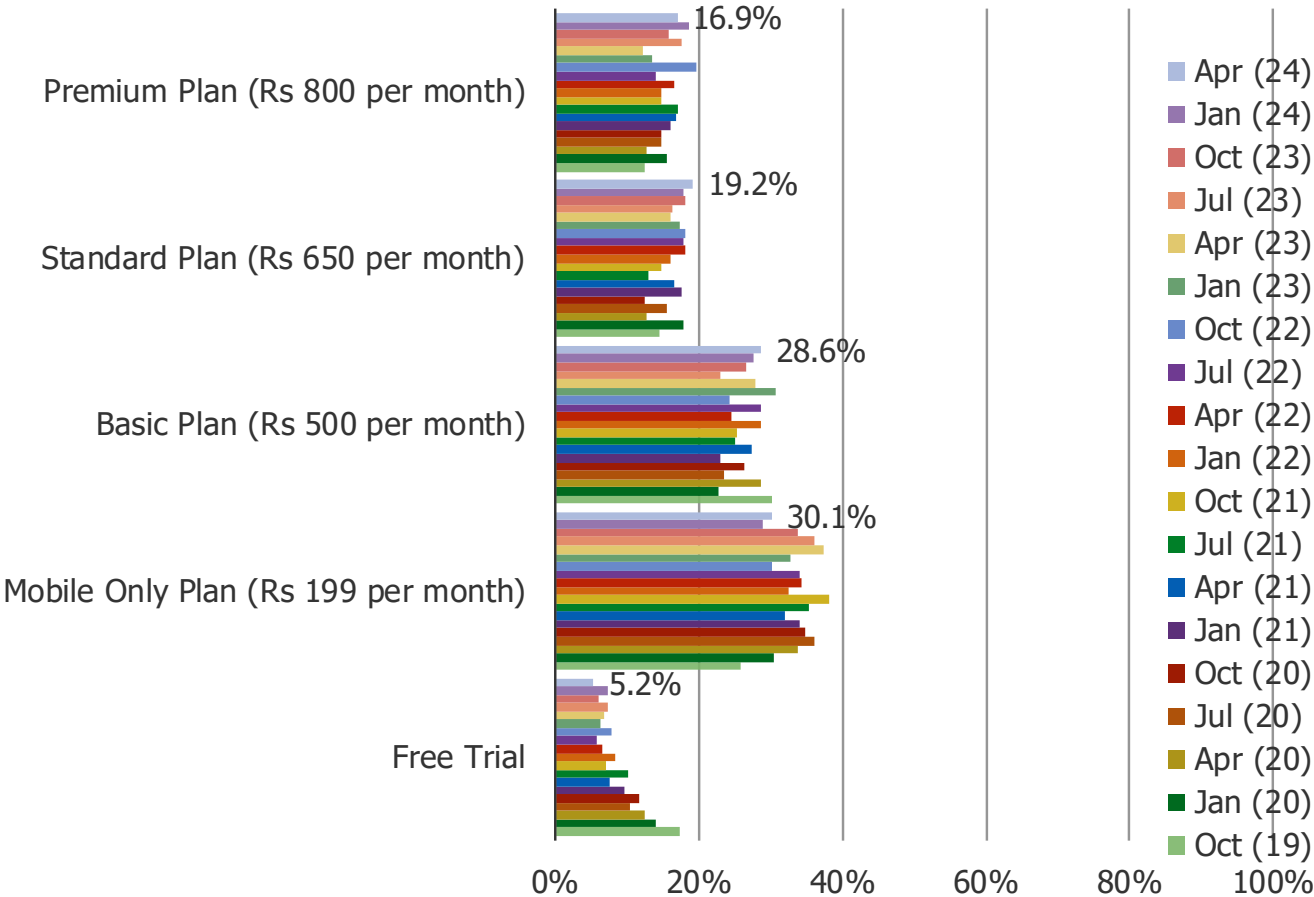
*Note – prices were changed in the survey in January of 2022 to reflect the changed rates.

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NETFLIX SUBSCRIBERS

WHICH NETFLIX PLAN ARE YOU SUBSCRIBED TO?

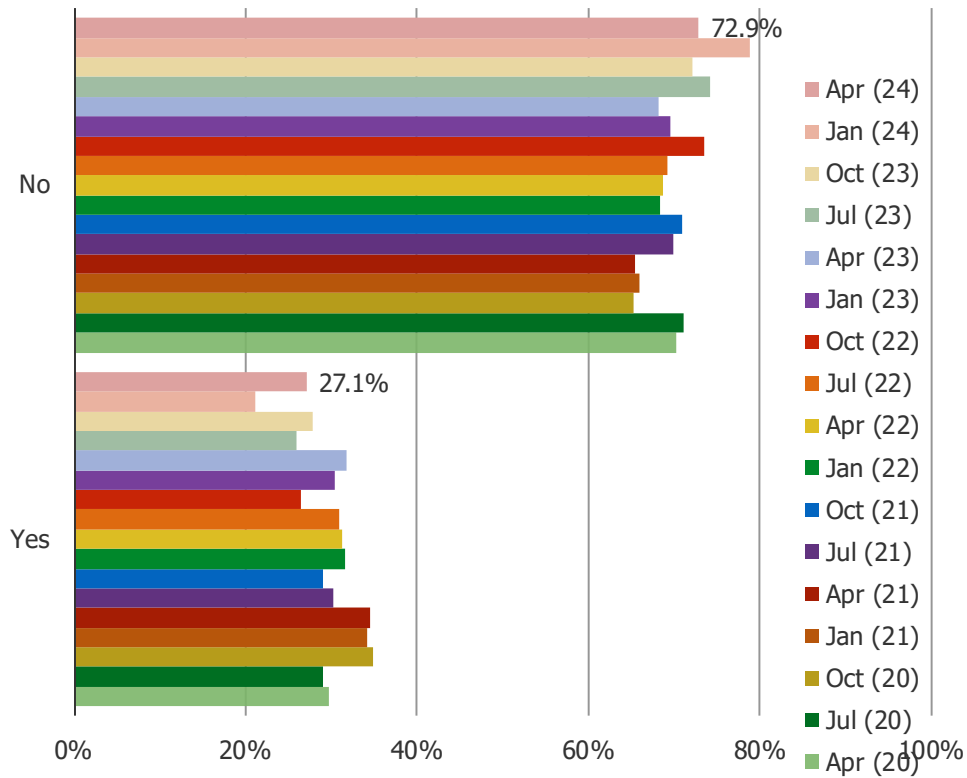
Posed to Netflix subscribers



*Note – prices were changed in the survey in January of 2022 to reflect the changed rates.

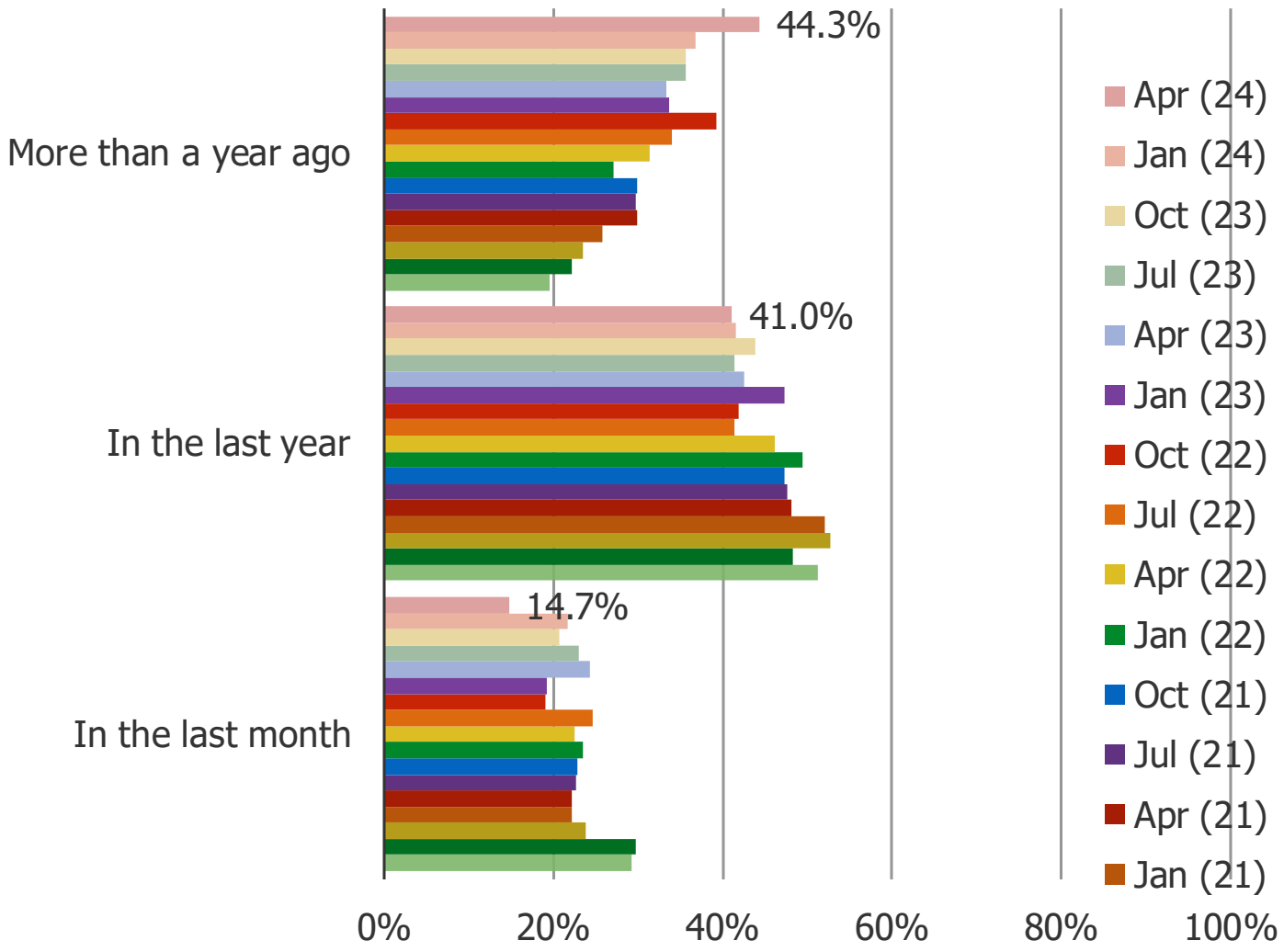
ARE YOU CONSIDERING CANCELLING YOUR NETFLIX SUBSCRIPTION IN THE NEXT FEW MONTHS?

Posed to Netflix subscribers



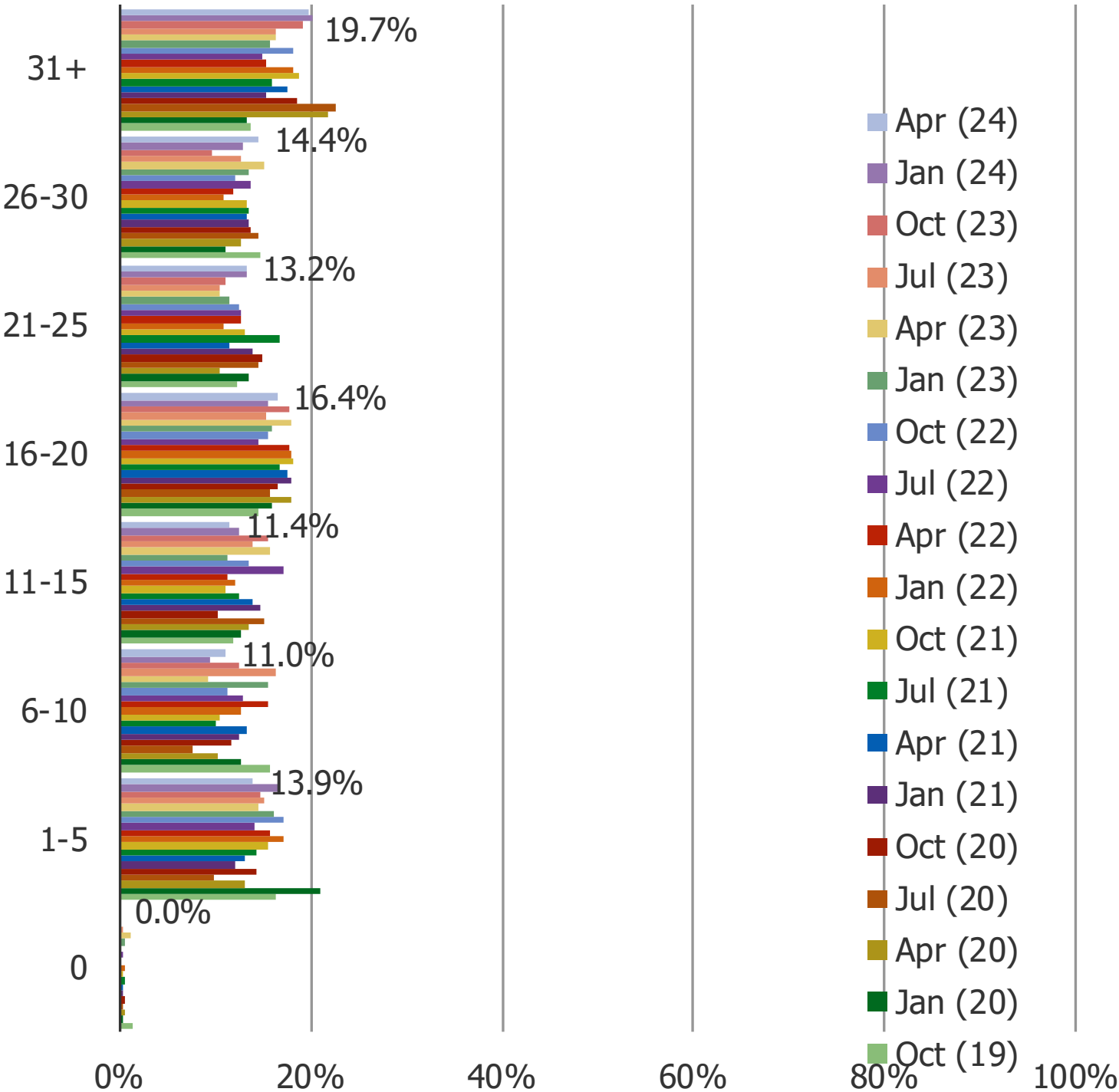
WHEN DID YOU SUBSCRIBE TO NETFLIX?

Posed to Netflix subscribers



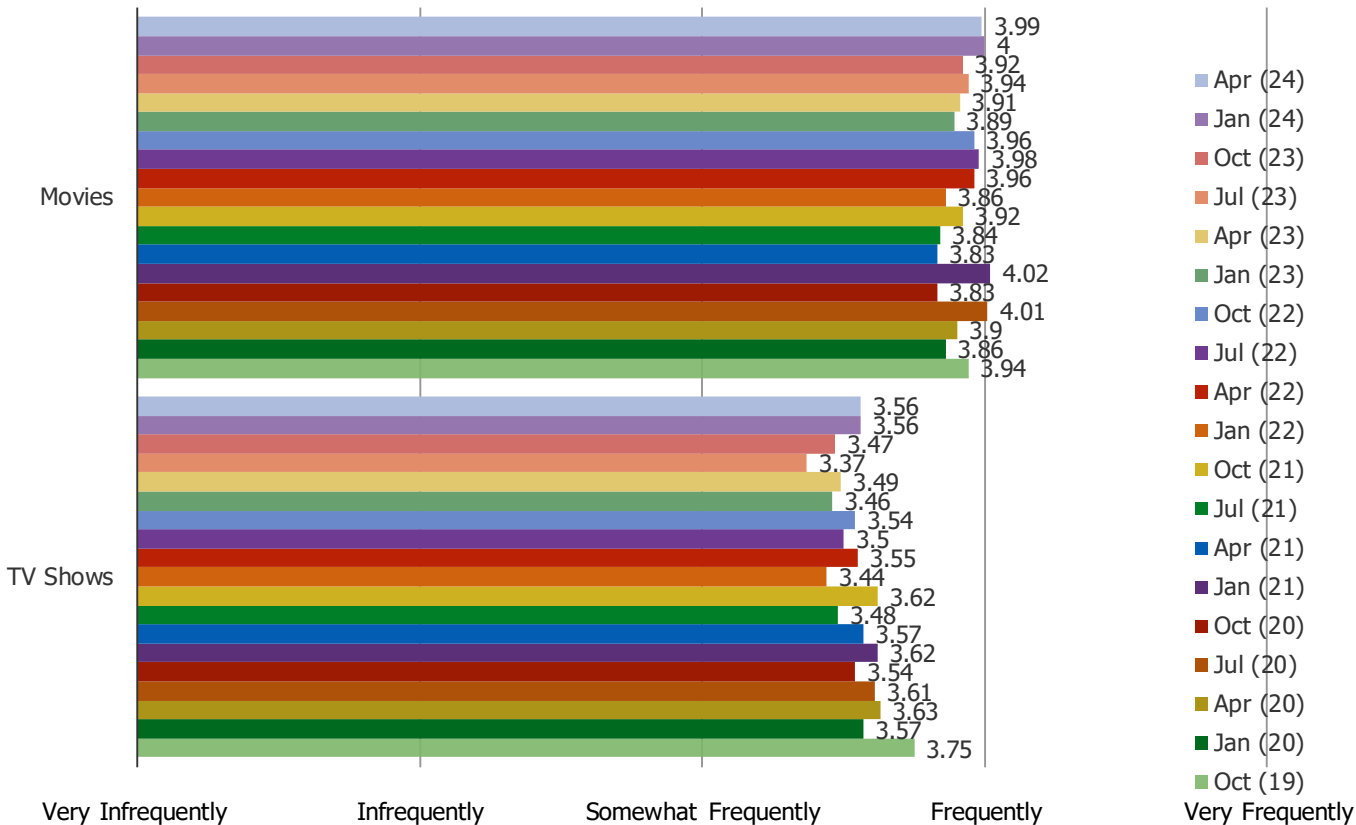
IN AN AVERAGE MONTH, HOW MANY HOURS OF NETFLIX DO YOU WATCH?

Posed to Netflix subscribers



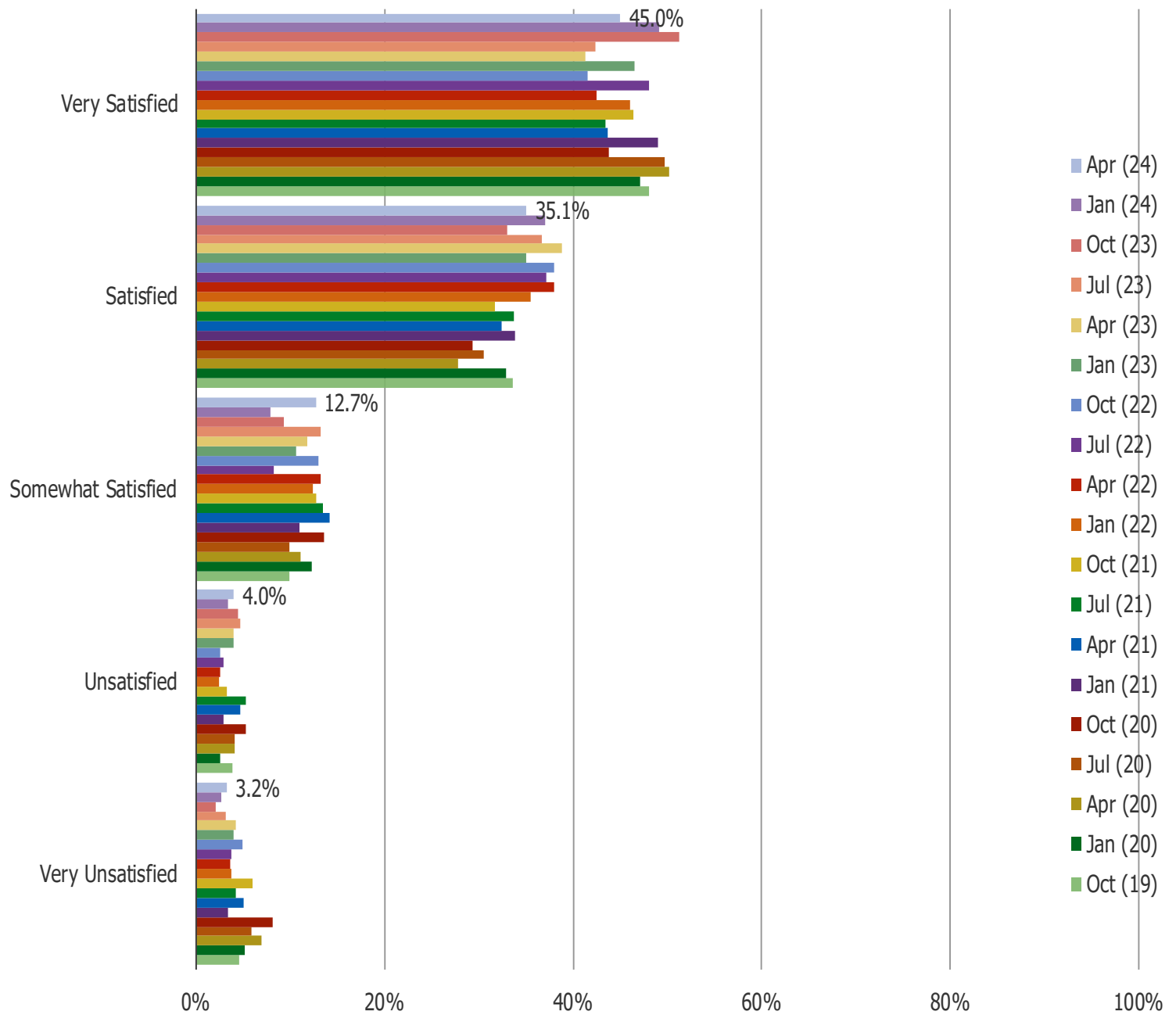
ON AVERAGE, HOW FREQUENTLY DO YOU USE NETFLIX TO WATCH TV SHOWS AND MOVIES?

Posed to Netflix subscribers



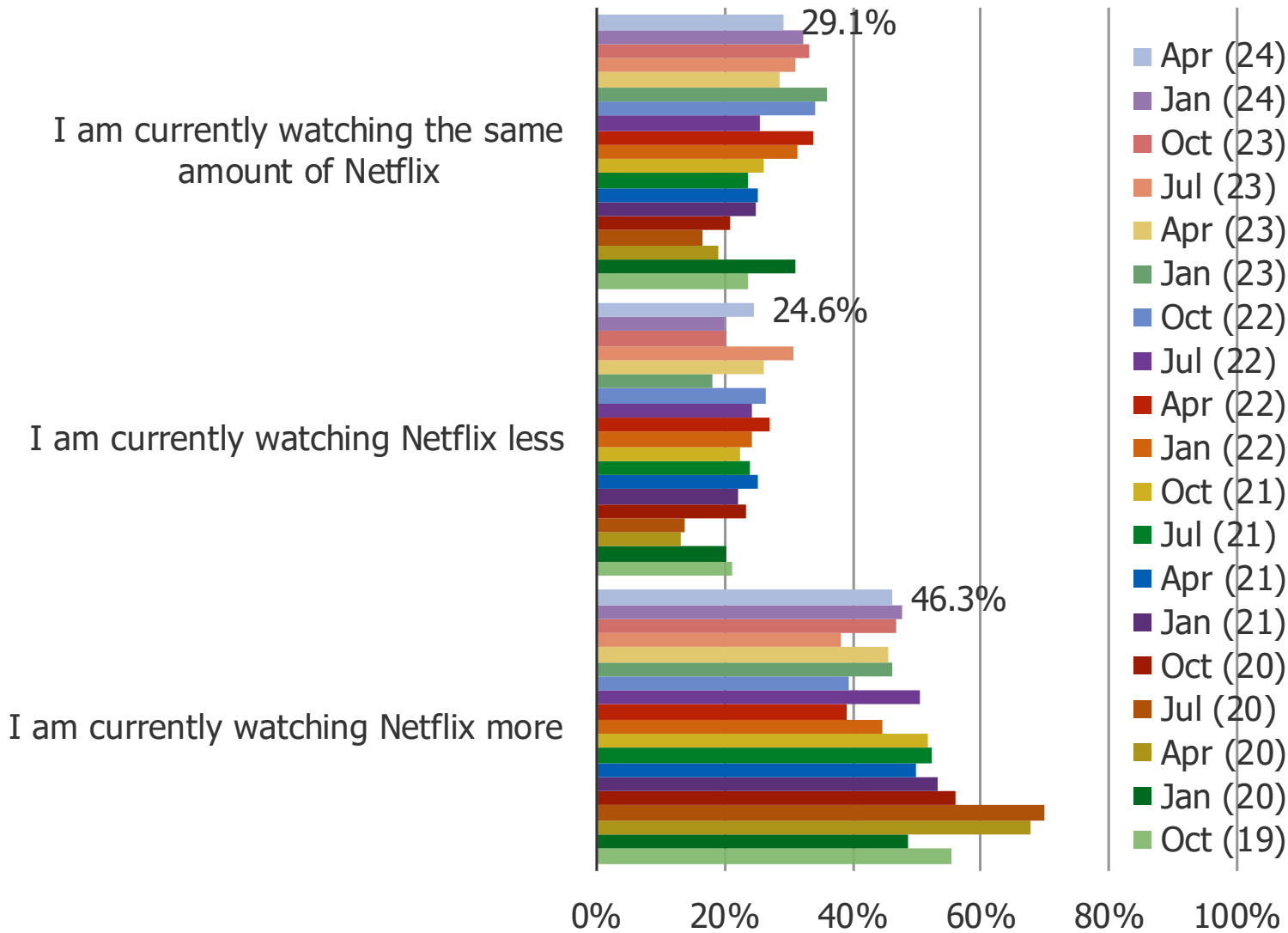
HOW SATISFIED ARE YOU WITH YOUR NETFLIX SUBSCRIPTION?

Posed to Netflix subscribers



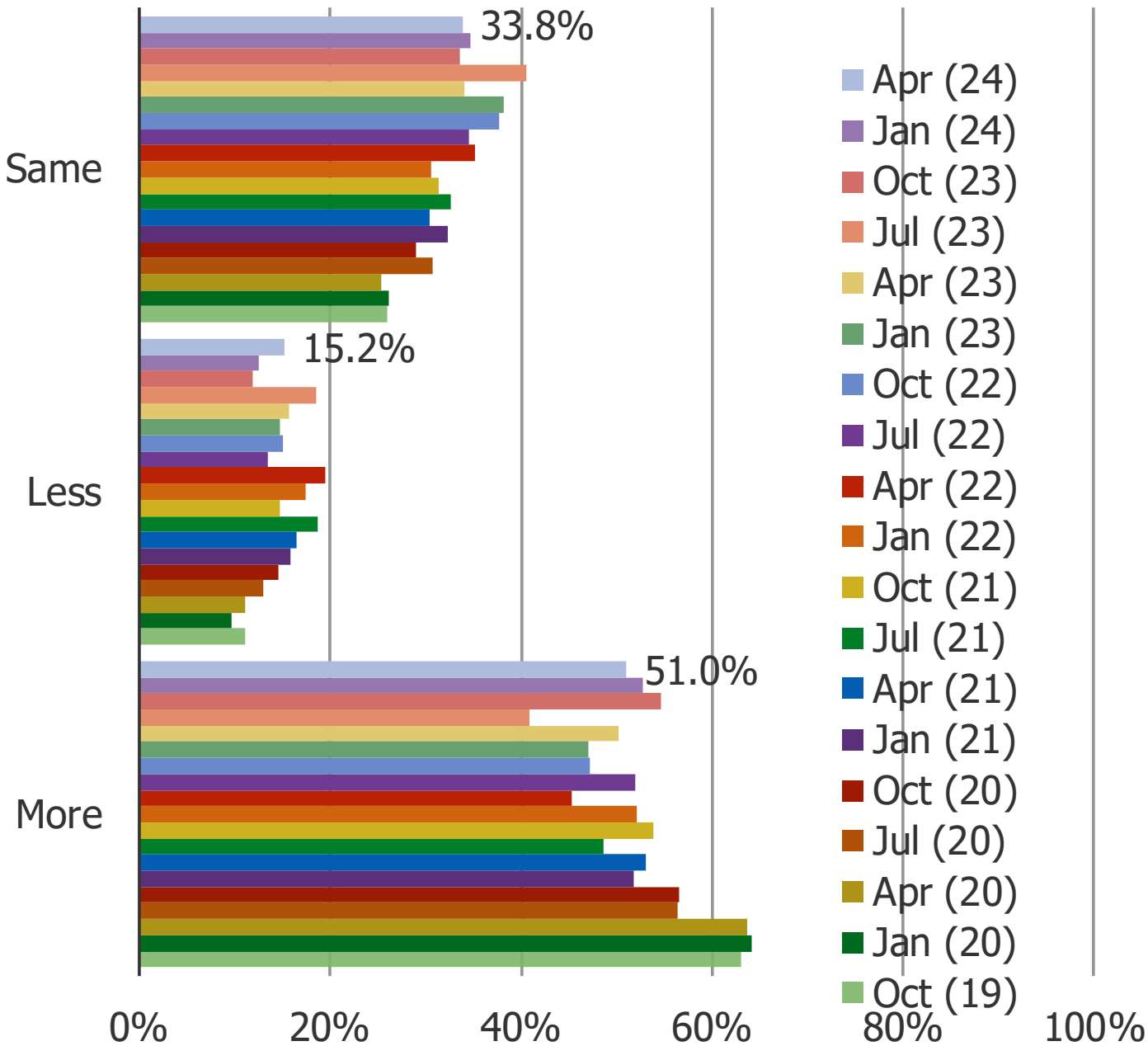
PLEASE COMPARE YOUR CURRENT USAGE OF NETFLIX WITH OUR USAGE 3-6 MONTHS AGO.

Posed to Netflix subscribers



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

Posed to Netflix subscribers

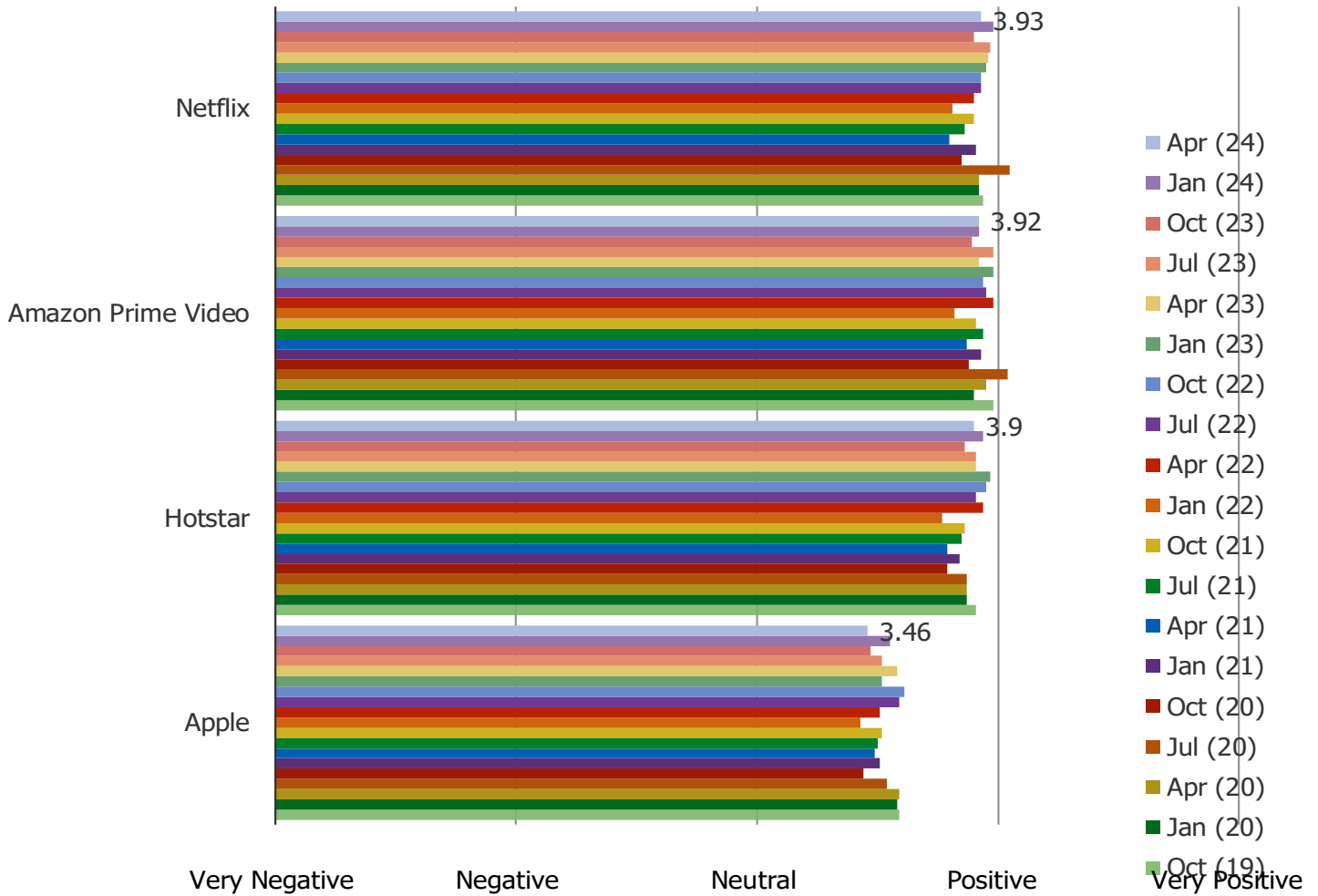


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SENTIMENT AND POPULARITY

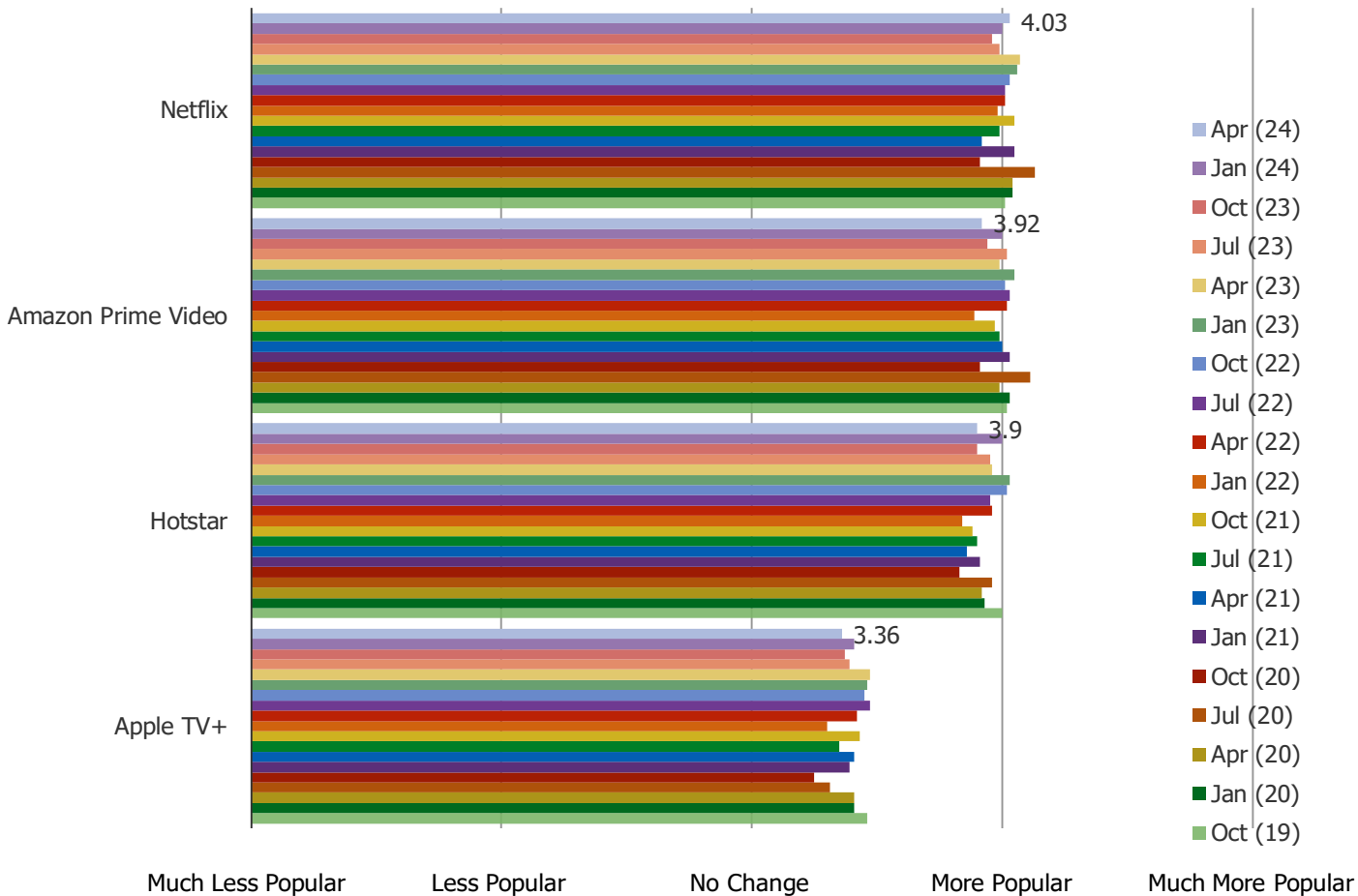
WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS OVERALL?

Posed to all respondents



ARE THE FOLLOWING GETTING MORE OR LESS POPULAR IN INDIA?

Posed to all respondents

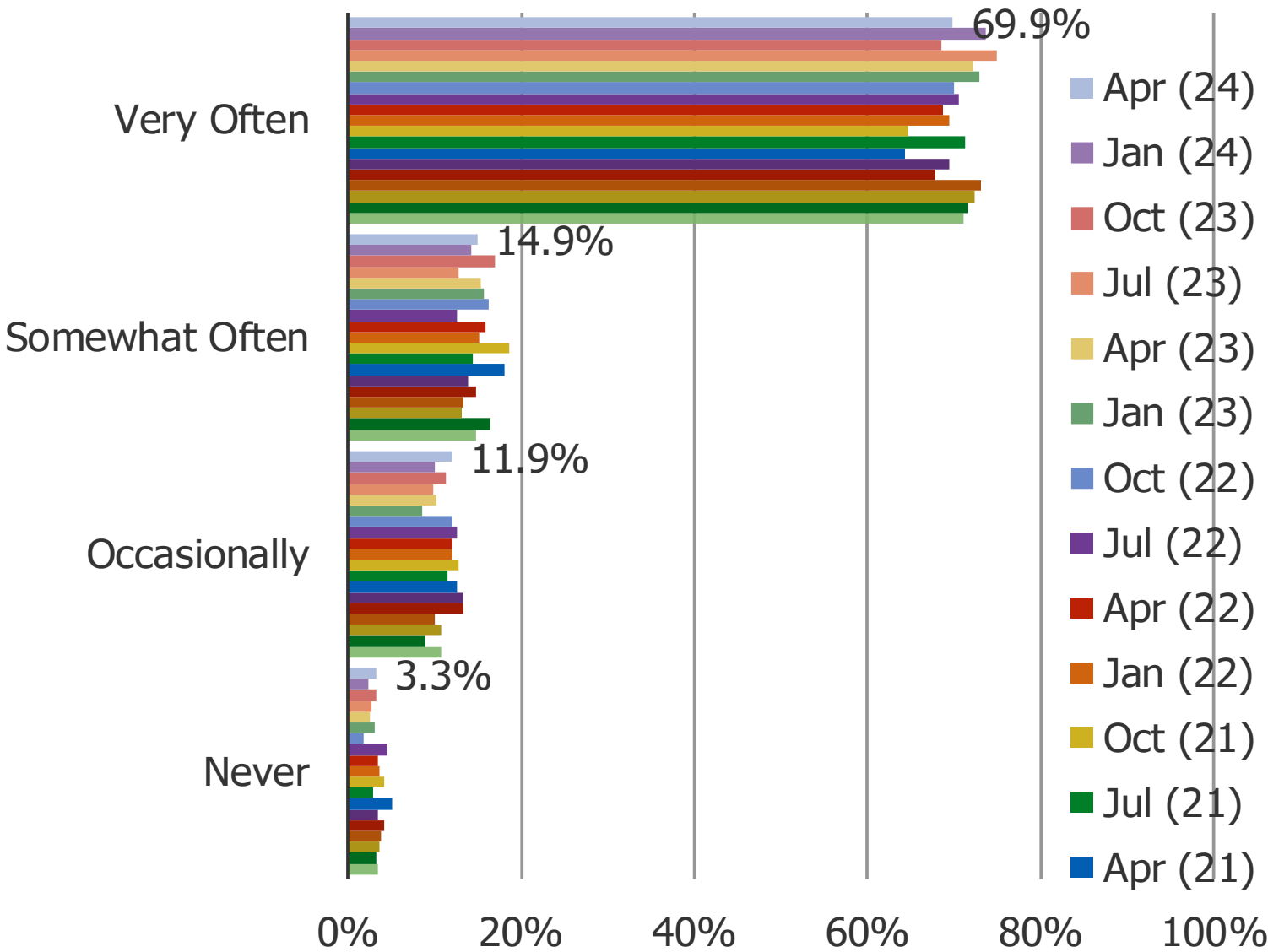


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INTERNET USAGE

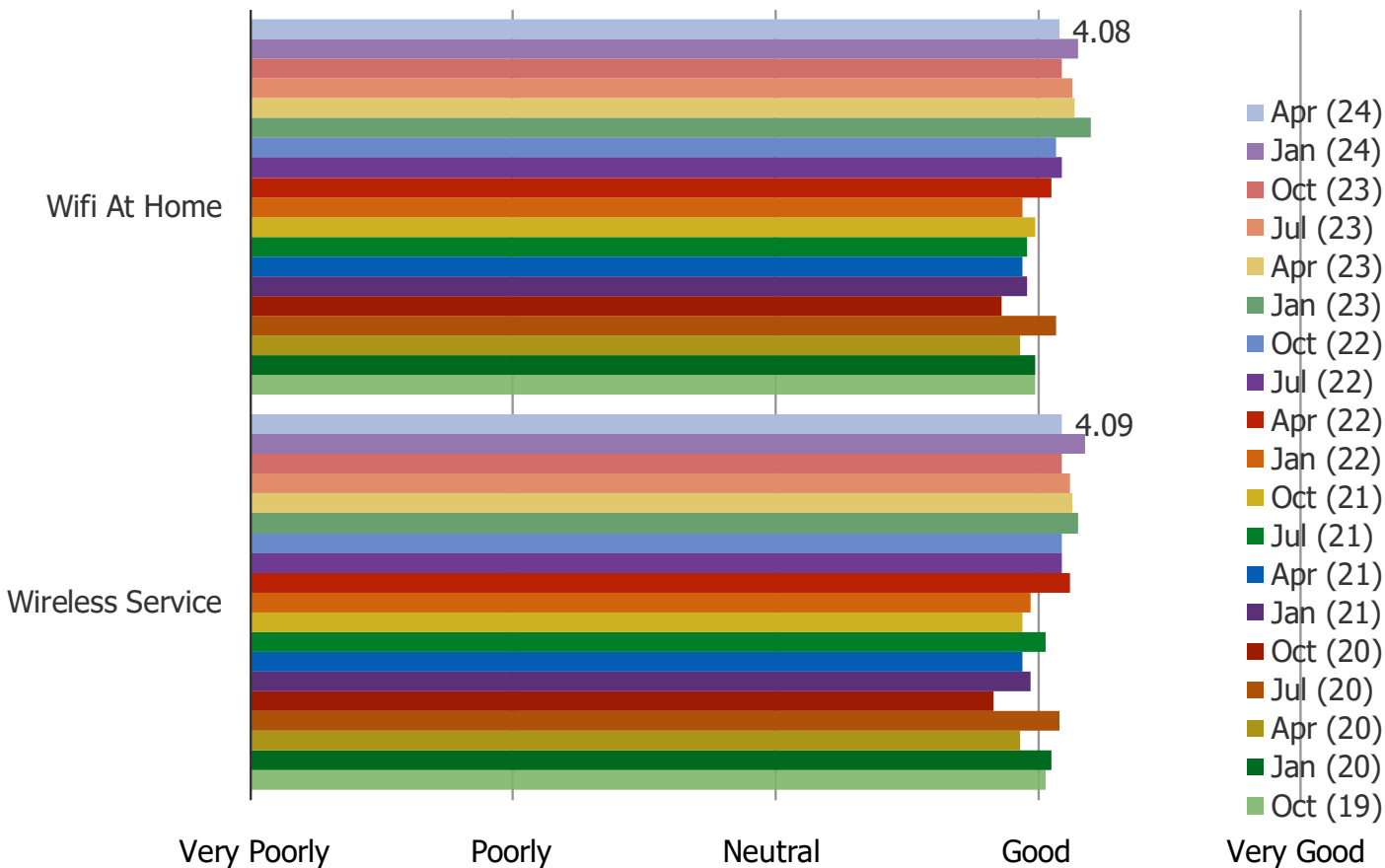
HOW OFTEN DO YOU ACCESS THE INTERNET?

Posed to all respondents



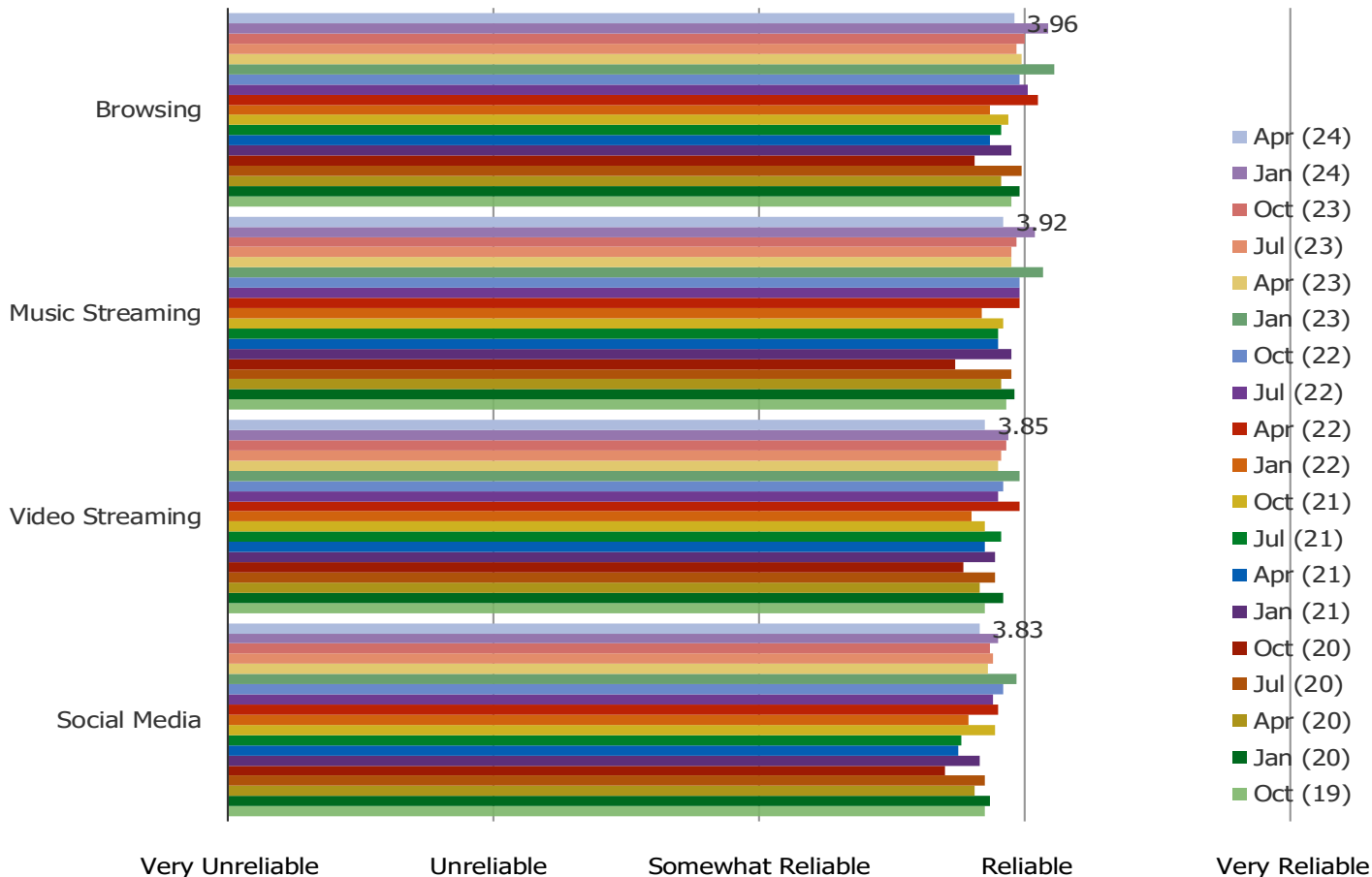
HOW WELL DOES THE INTERNET WORK ON YOUR DEVICE?

Posed to respondents who at least occasionally access the internet



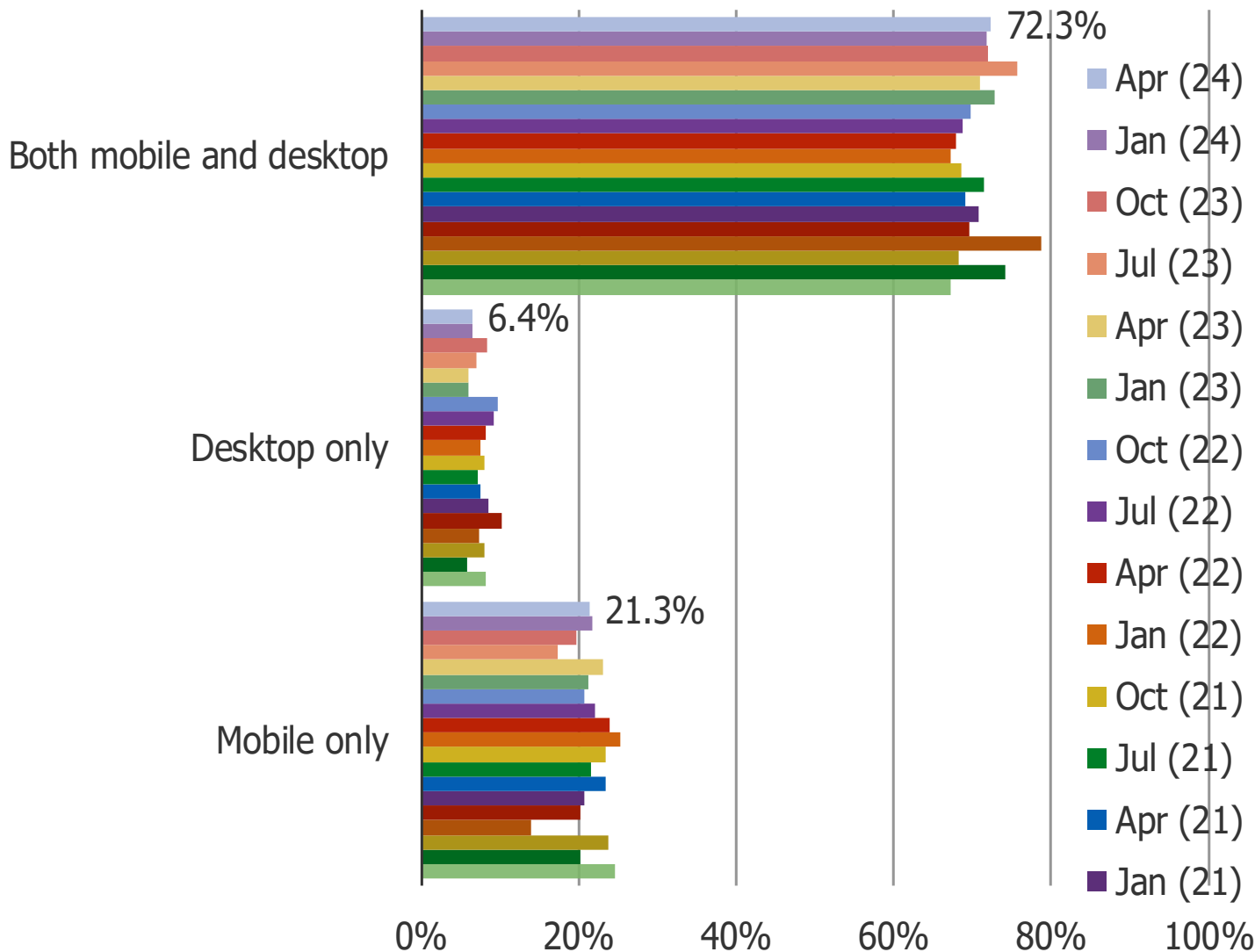
HOW EFFECTIVE ARE THE SERVICES YOU USE TO CONNECT TO THE INTERNET?

Posed to respondents who at least occasionally access the internet



HOW DO YOU LIKE ACCESSING THE INTERNET?

Posed to respondents who at least occasionally access the internet

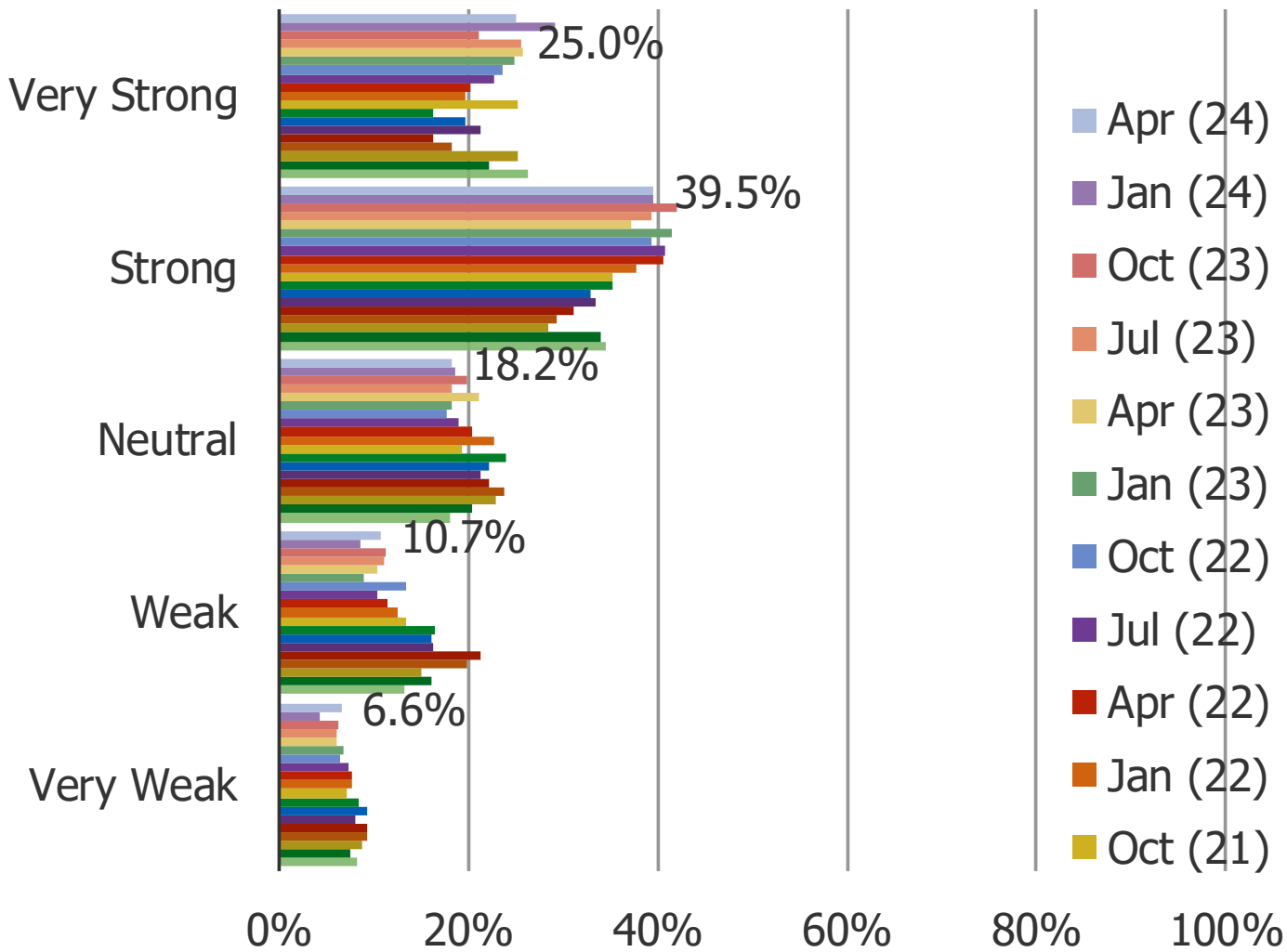


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MACRO FACTORS

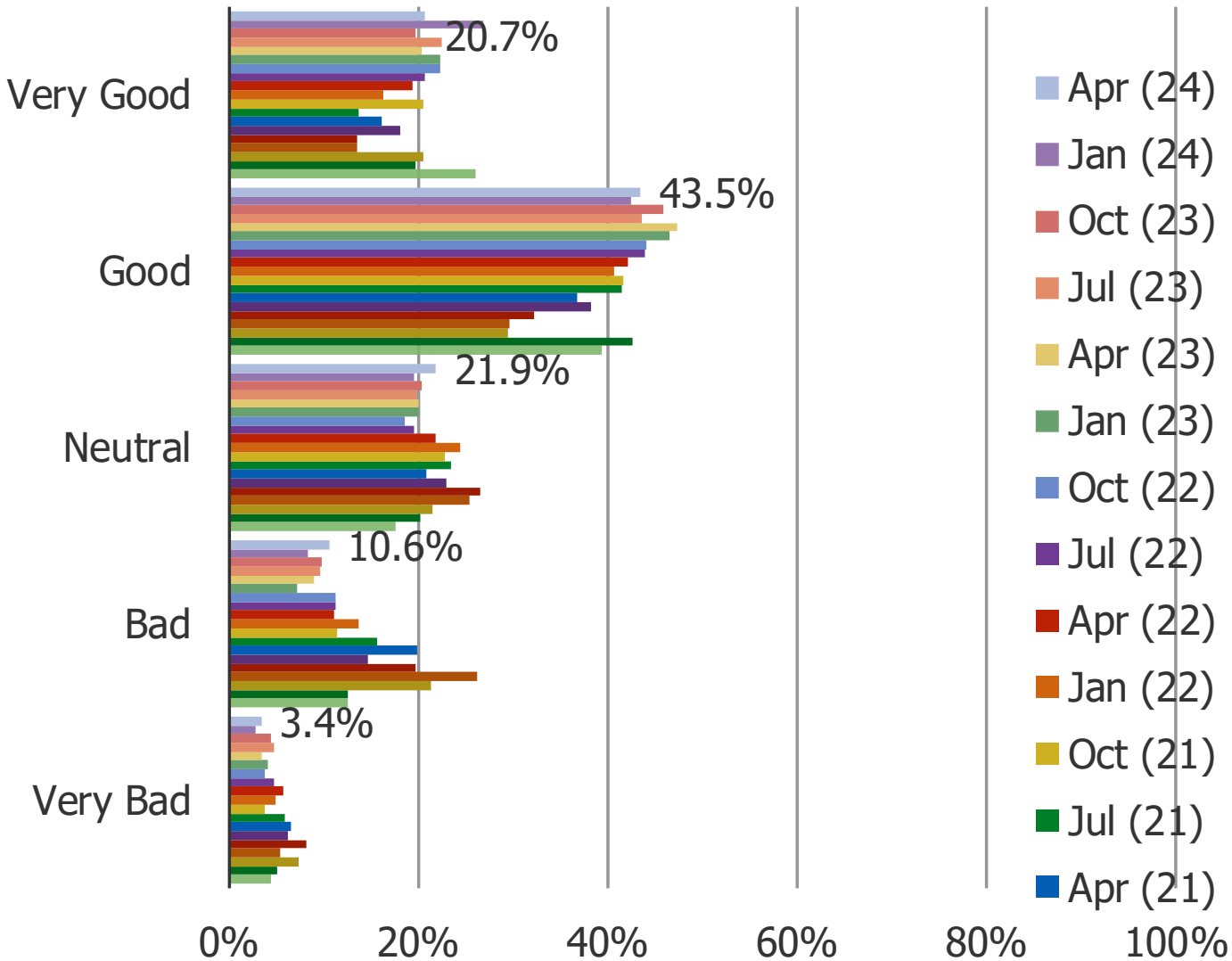
OVERALL HOW CONFIDENT DO YOU FEEL IN THE ECONOMY?

Posed to all respondents



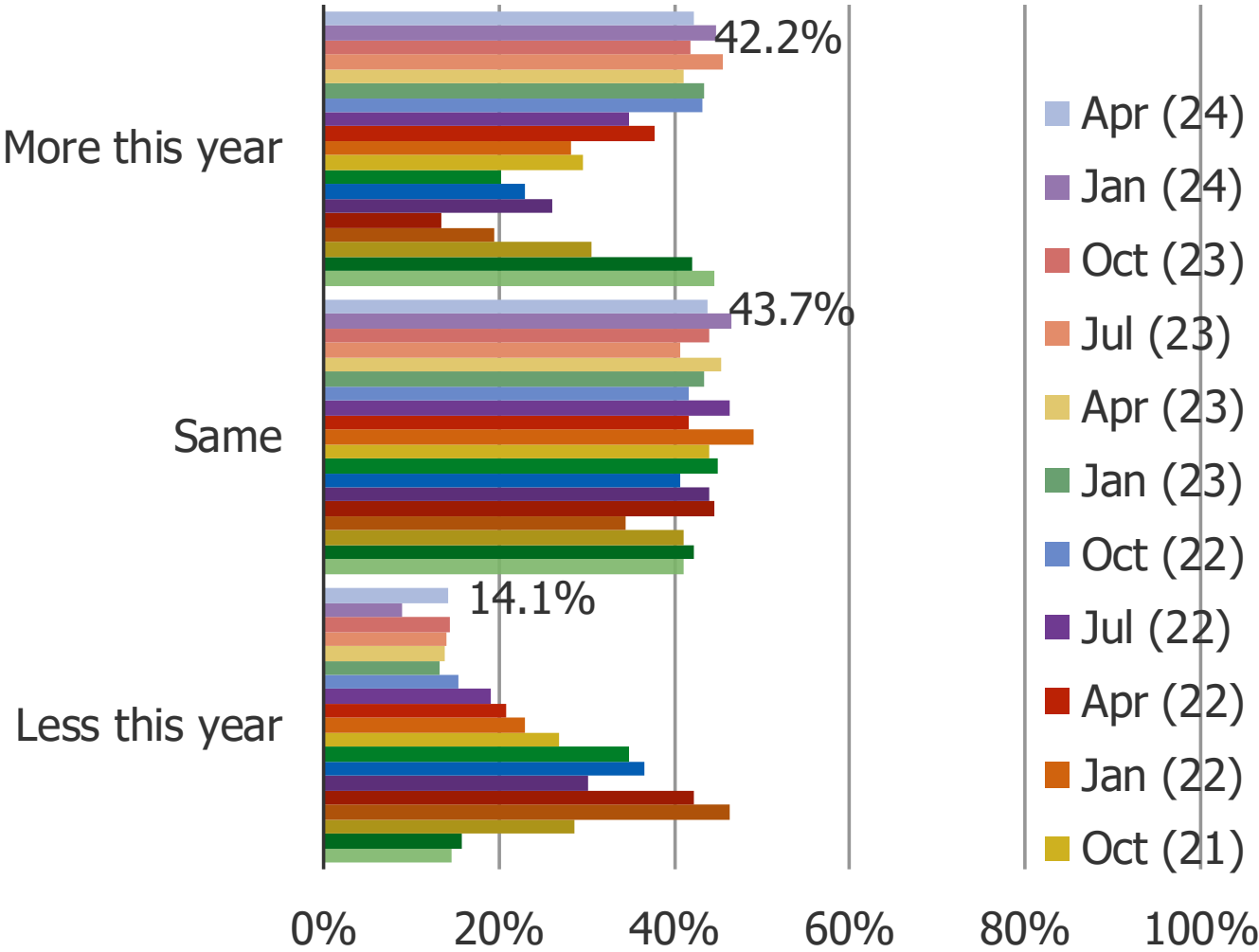
HOW DO YOU FEEL ABOUT YOUR PERSONAL FINANCES AT THIS TIME?

Posed to all respondents



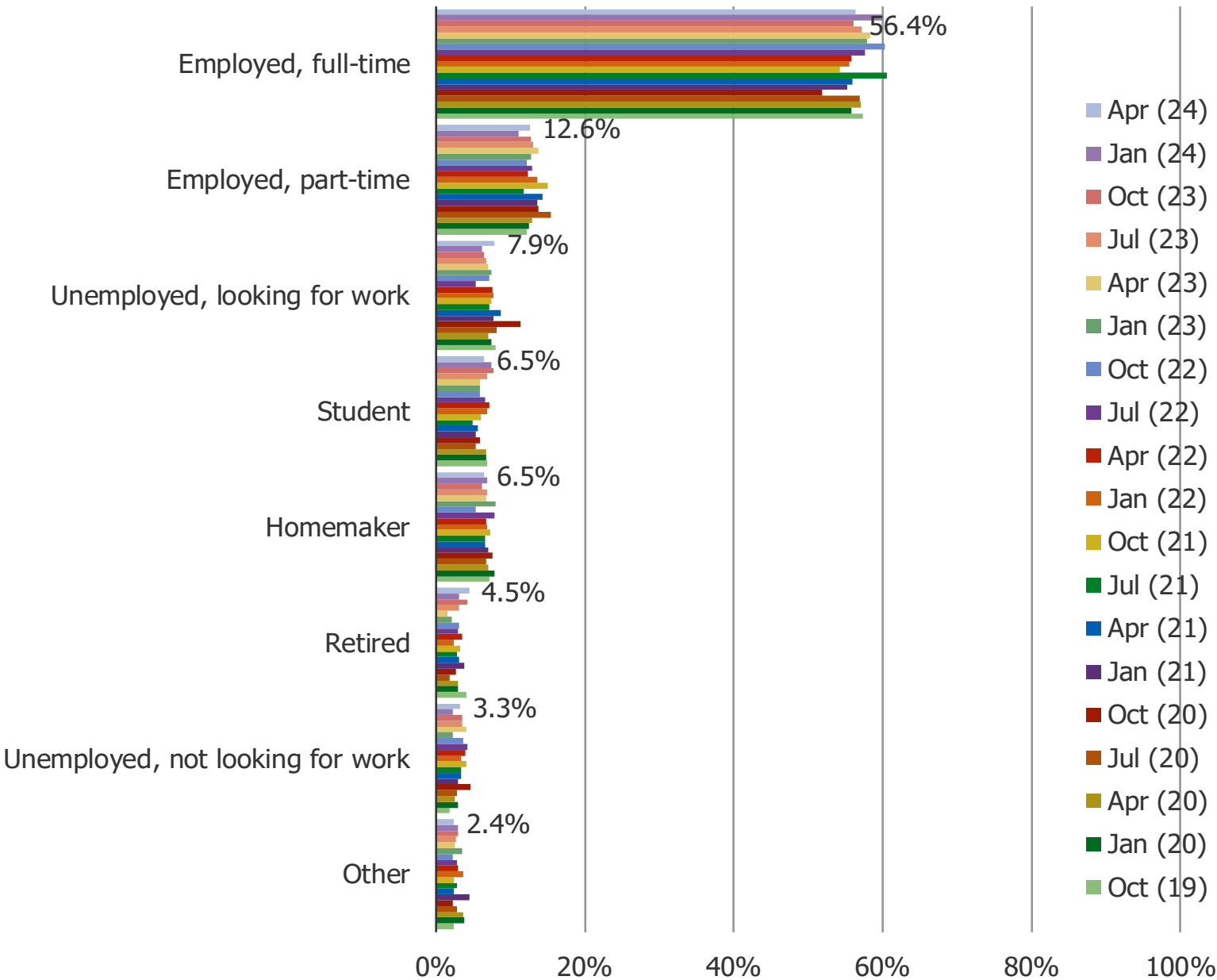
IS YOUR INCOME MORE OR LESS THIS YEAR THAN IN THE PREVIOUS YEAR?

Posed to all respondents



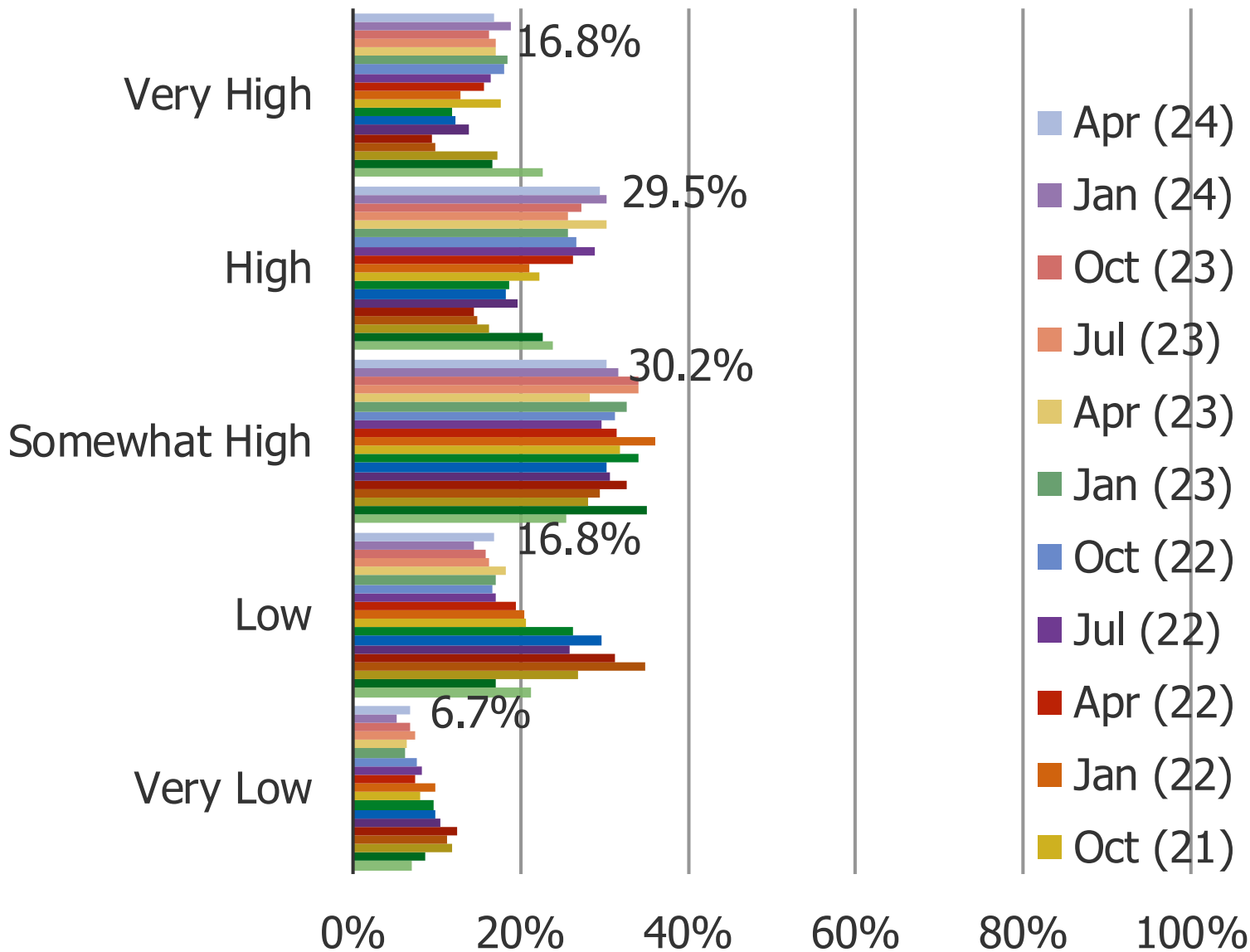
WHAT IS YOUR EMPLOYMENT STATUS?

Posed to all respondents



PLEASE EVALUATE YOUR CONFIDENCE ABOUT SPENDING MONEY AT THIS TIME

Posed to all respondents

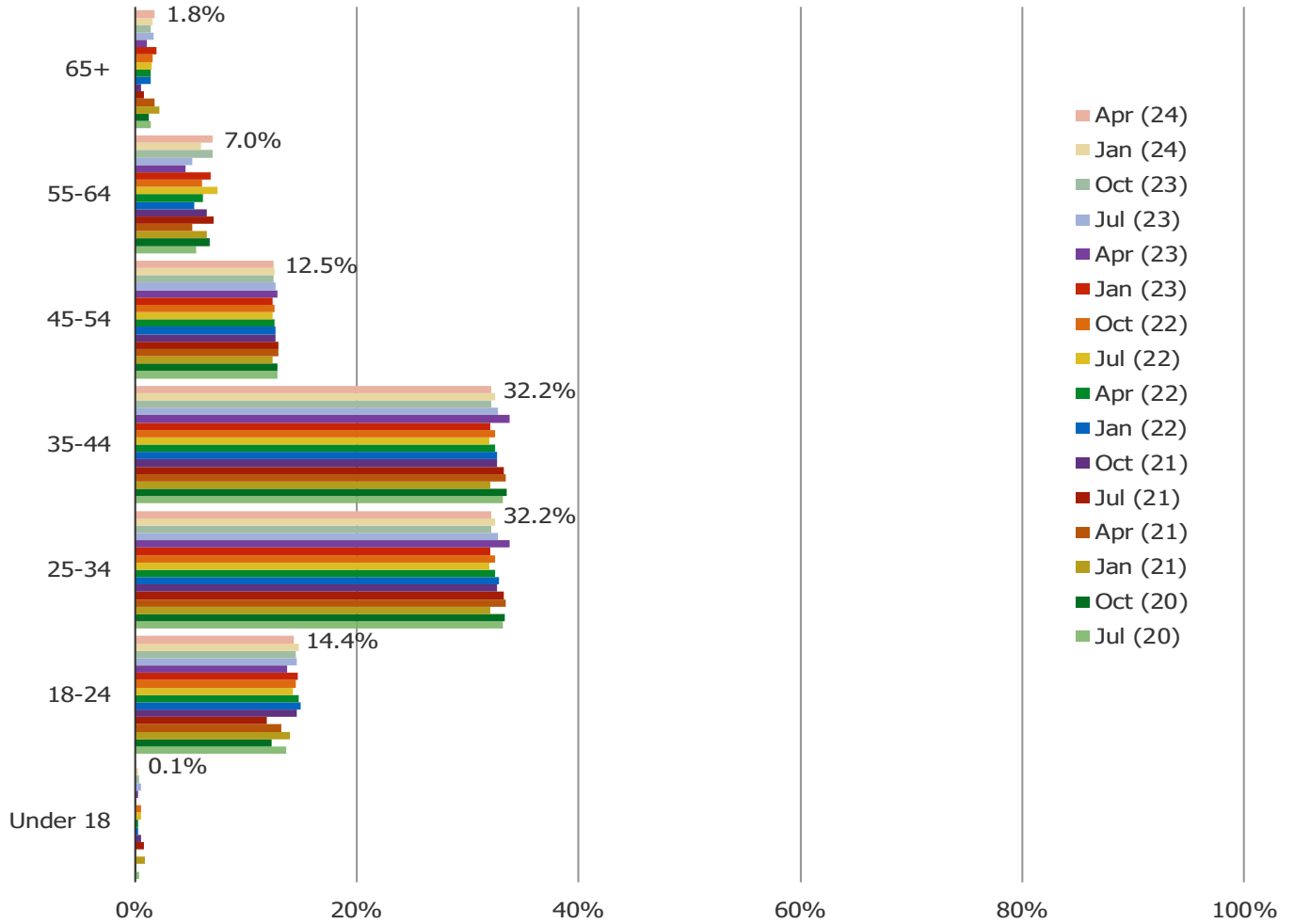


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DEMOGRAPHICS

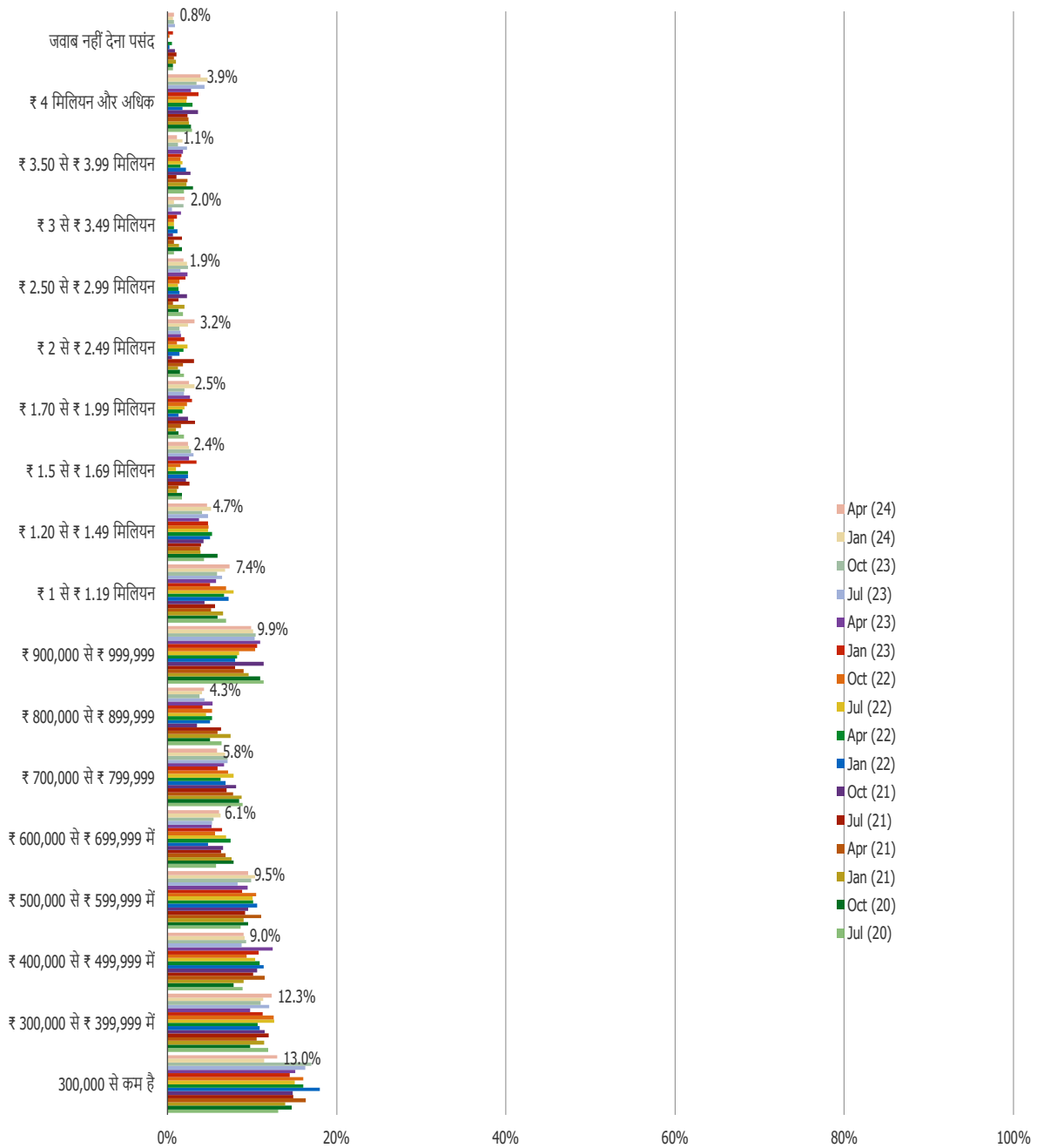
AGE

Posed to all respondents



INCOME

Posed to all respondents



GENDER

Posed to all respondents

