

Bespoke Survey Research

October 2024

Streaming Video Survey

Volume 46 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: NFLX, DIS, T, CMCSA.

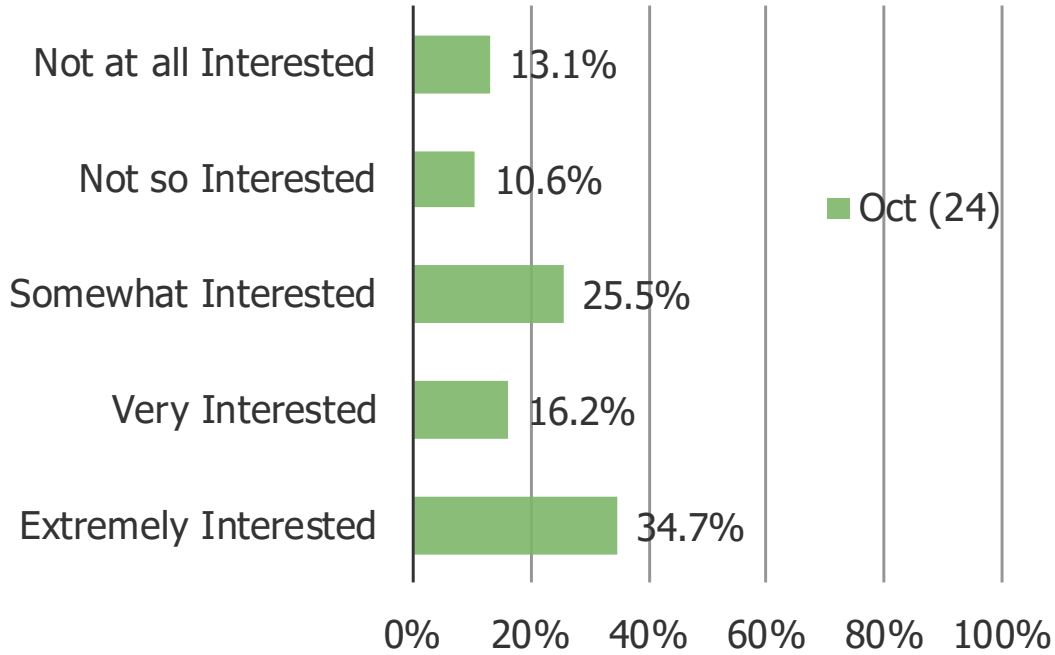
Key Takeaways:

- This quarter, we asked consumers about a free version of Netflix with ads to better understand the appeal of such an offering. Commentary skewed positive with close to 35% of respondents indicating that they would be extremely interested in a free version with ads. Non-Netflix subscribers express a high degree of interest (even more interest from non-subscribers who used to be a Netflix subscriber in the past).
- Close to 43% of those who said that they were at least somewhat interested in a free version of Netflix with ads indicated that they would watch it multiple hours per day.
- Feedback towards the NFL on Netflix continues to be positive and interest strengthened somewhat q/q relative to our initial check.
- Interest in watching live sports on Netflix has improved modestly and the share who said that live sports would make them less likely to cancel Netflix also increased q/q.
- The share who let anyone living outside of their household use their Netflix account stands at series lows.
- The number of streaming video services that consumers think it is appropriate to pay for at the same time has increased more recently.
- According to consumers, the value proposition of Netflix remains strong and has strengthened somewhat in the last few quarters.
- YouTube Premium ranks the best when it comes to perceived value of the service relative to what it costs.
- Netflix tests well as it relates to content available (it is second to only YouTube Premium) and ranks ahead of major platforms like HBO Max, Hulu, and Disney+.
- The share who subscribe to cable/satellite has declined considerably over time and is tracking near series lows.
- The share of Netflix subscribers contemplating cancelling has been on the decline.
- In all, Netflix subscribers have become accustomed to expecting price increases from the platform (a very small share of subs expect to see zero price increases within a two year window).

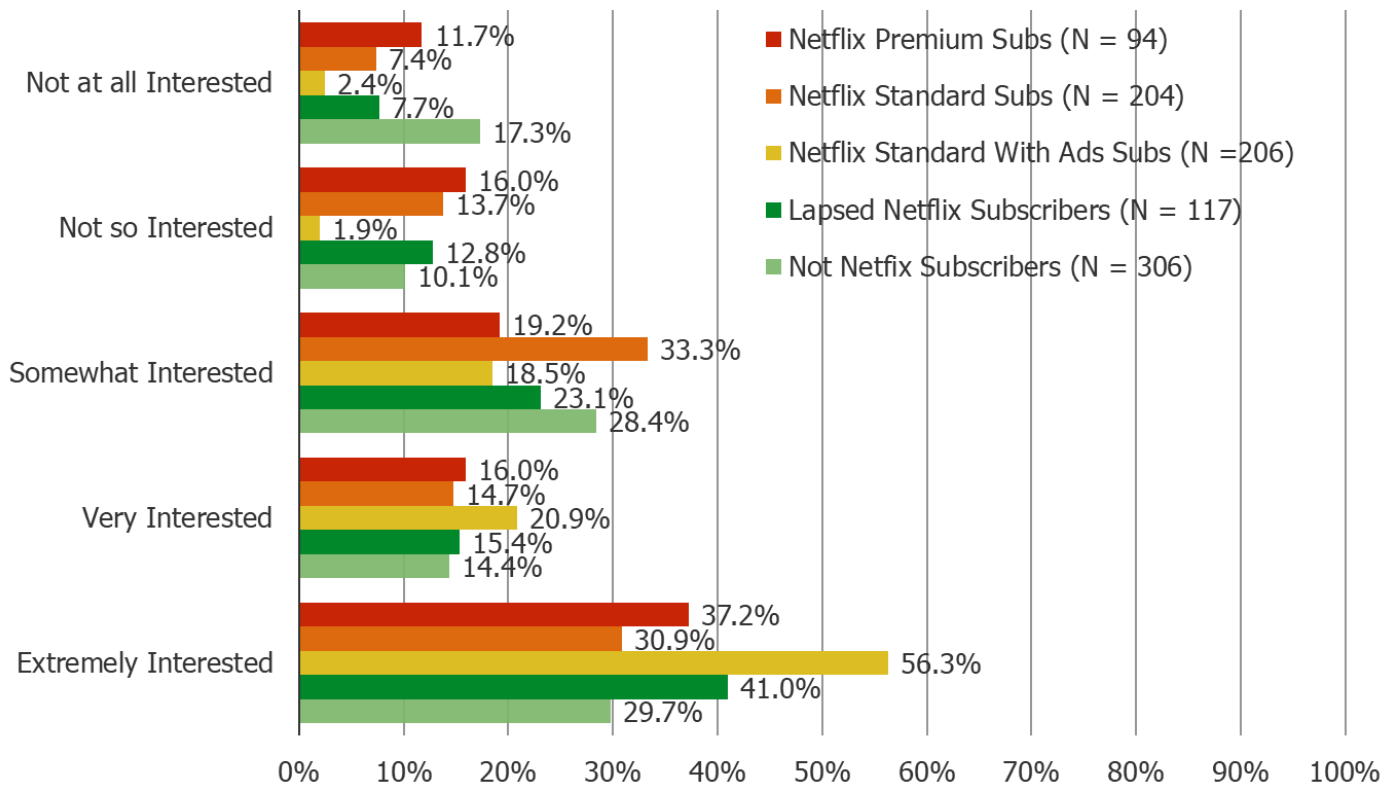
NEW QUESTIONS

HOW MUCH INTEREST WOULD YOU HAVE IN A FREE VERSION OF NETFLIX WITH ADS?

Posed to all respondents.

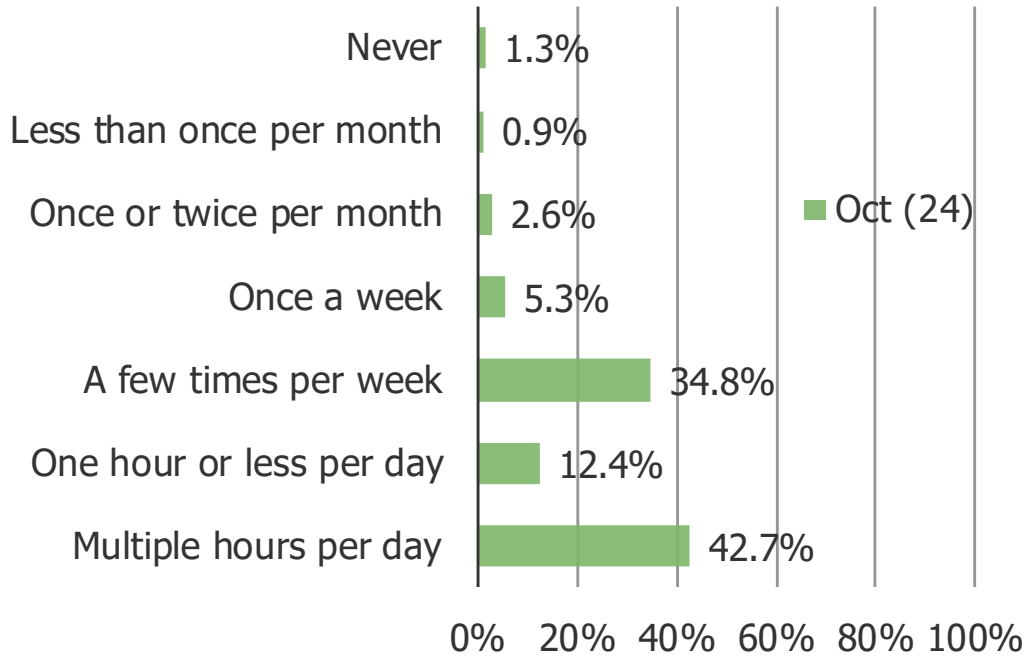


Cross-Tabbing the chart above...

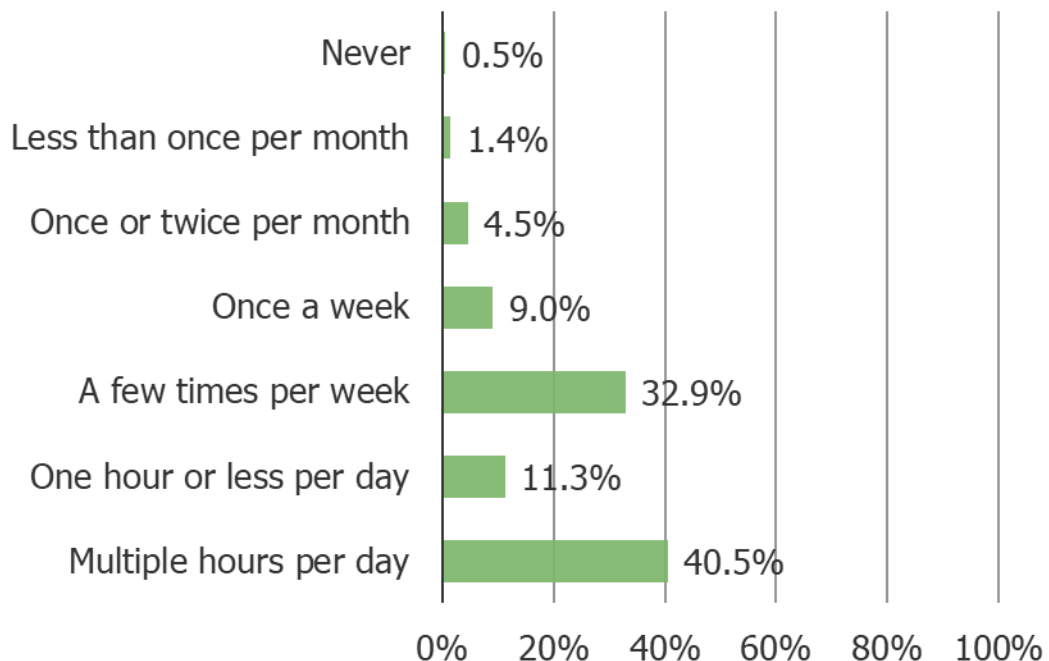


IF THERE WAS A FREE VERSION OF NETFLIX WITH ADS, HOW OFTEN DO YOU THINK YOU WOULD WATCH IT?

Posed to all respondents who are at least somewhat interested in a free version of Netflix with ads.

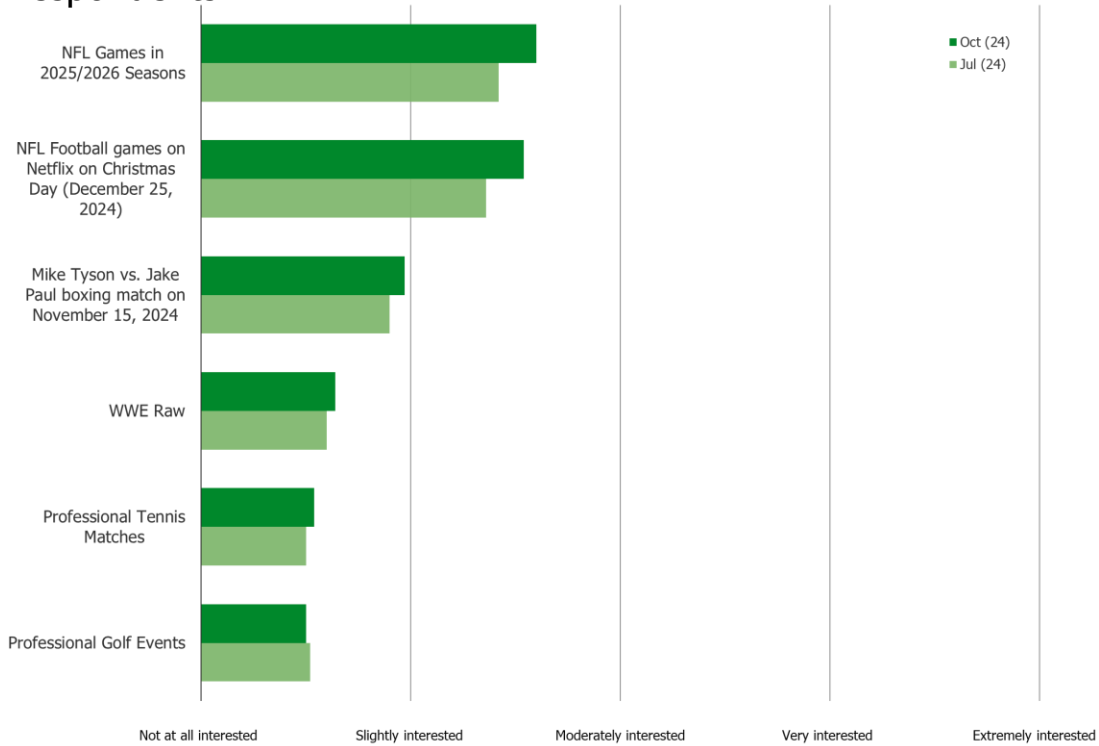


Cross-Tabbing the chart above... respondents who are not Netflix subscribers and are at least somewhat interested in a free version of Netflix with ads (N = 222)

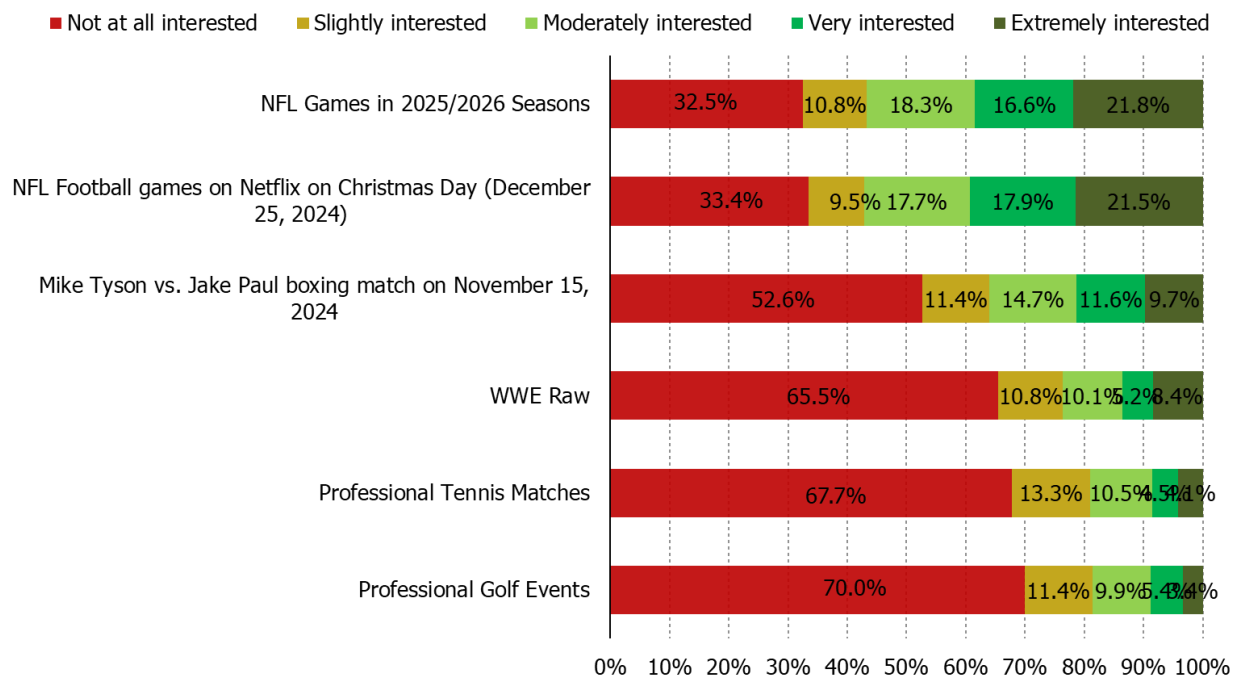


HOW MUCH INTEREST DO YOU HAVE IN WATCHING THE FOLLOWING ON NETFLIX?

Posed to all respondents.

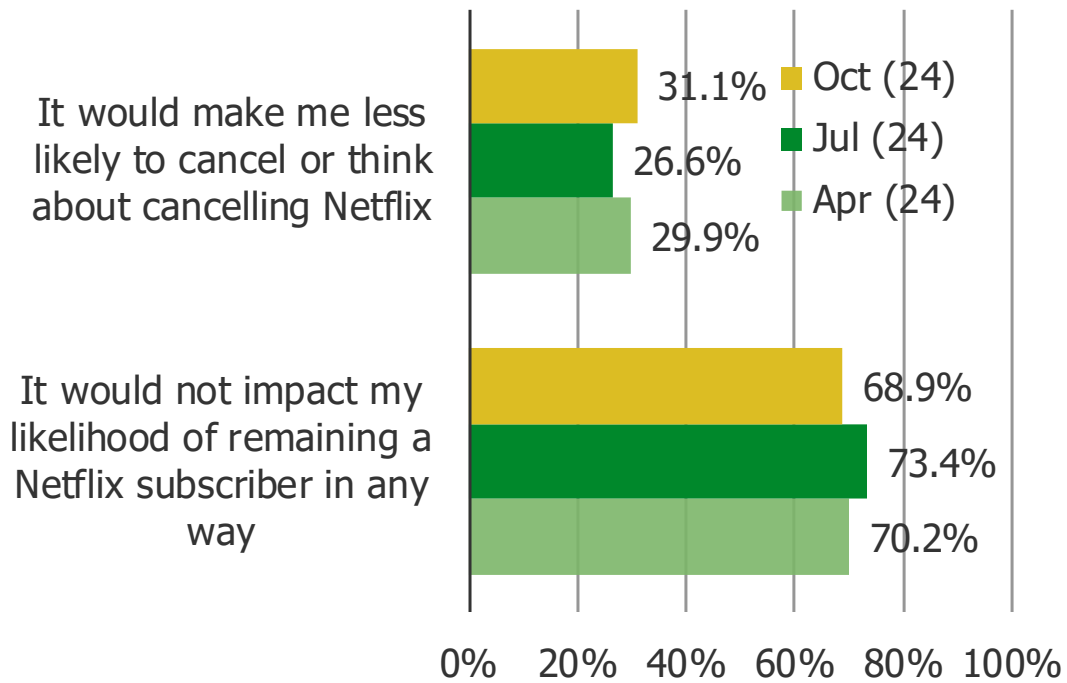


Posed to Netflix subscribers.



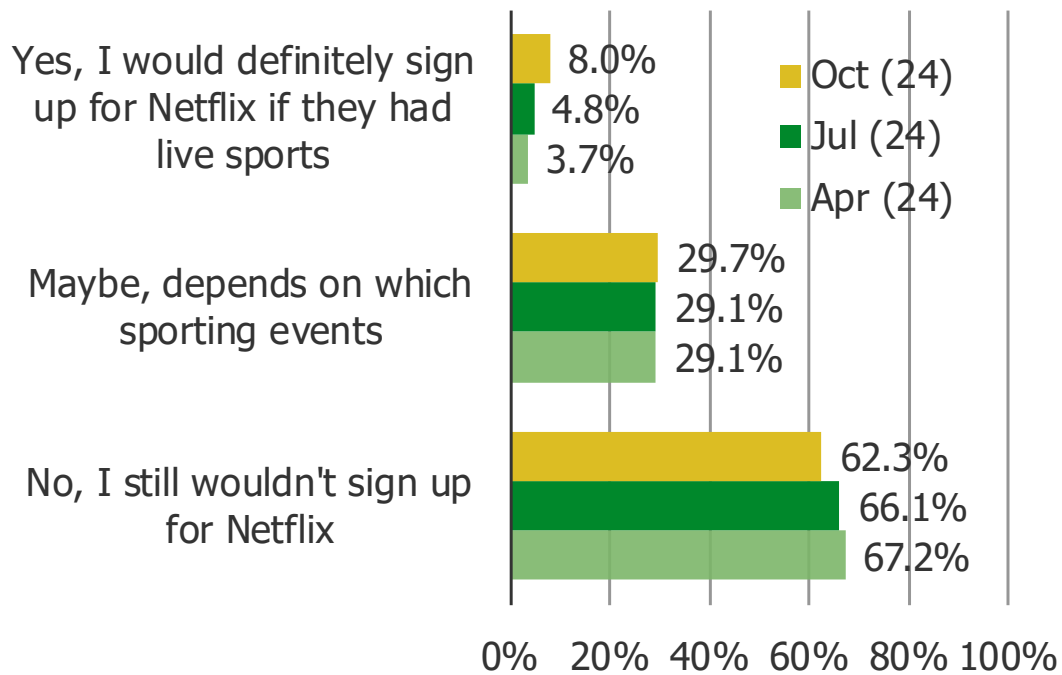
YOU MENTIONED YOU ARE A NETFLIX SUBSCRIBER. IF NETFLIX STARTED OFFERING MORE LIVE SPORTS EVENTS ON NETFLIX, WHICH BEST DESCRIBES YOU...

Posed to respondents who are Netflix subscribers.



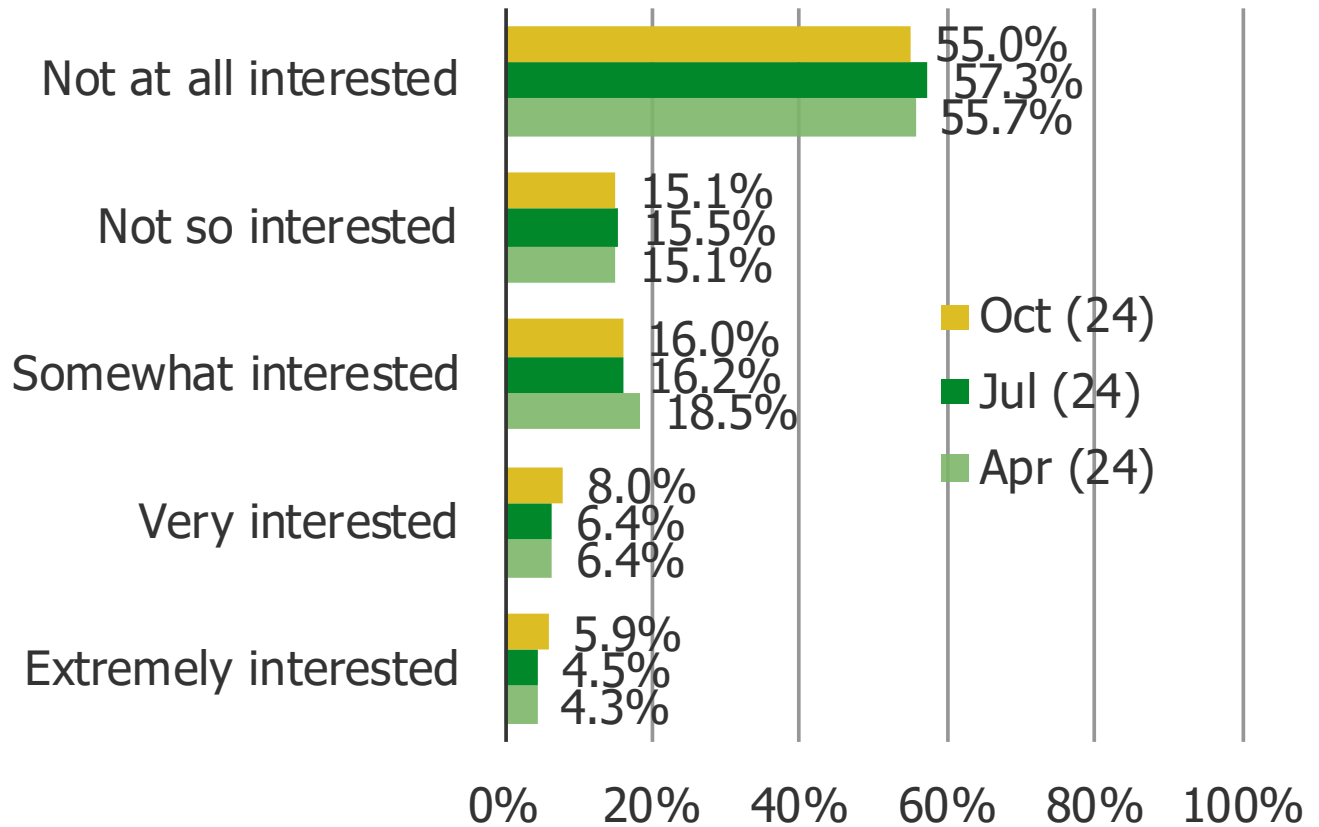
YOU MENTIONED THAT YOU ARE NOT A NETFLIX SUBSCRIBER. IF NETFLIX STARTED OFFERING MORE LIVE SPORTING EVENTS AS PART OF THEIR SUBSCRIPTION, WOULD THAT COMPEL YOU TO SIGN UP FOR NETFLIX?

Posed to respondents who are NOT Netflix subscribers.



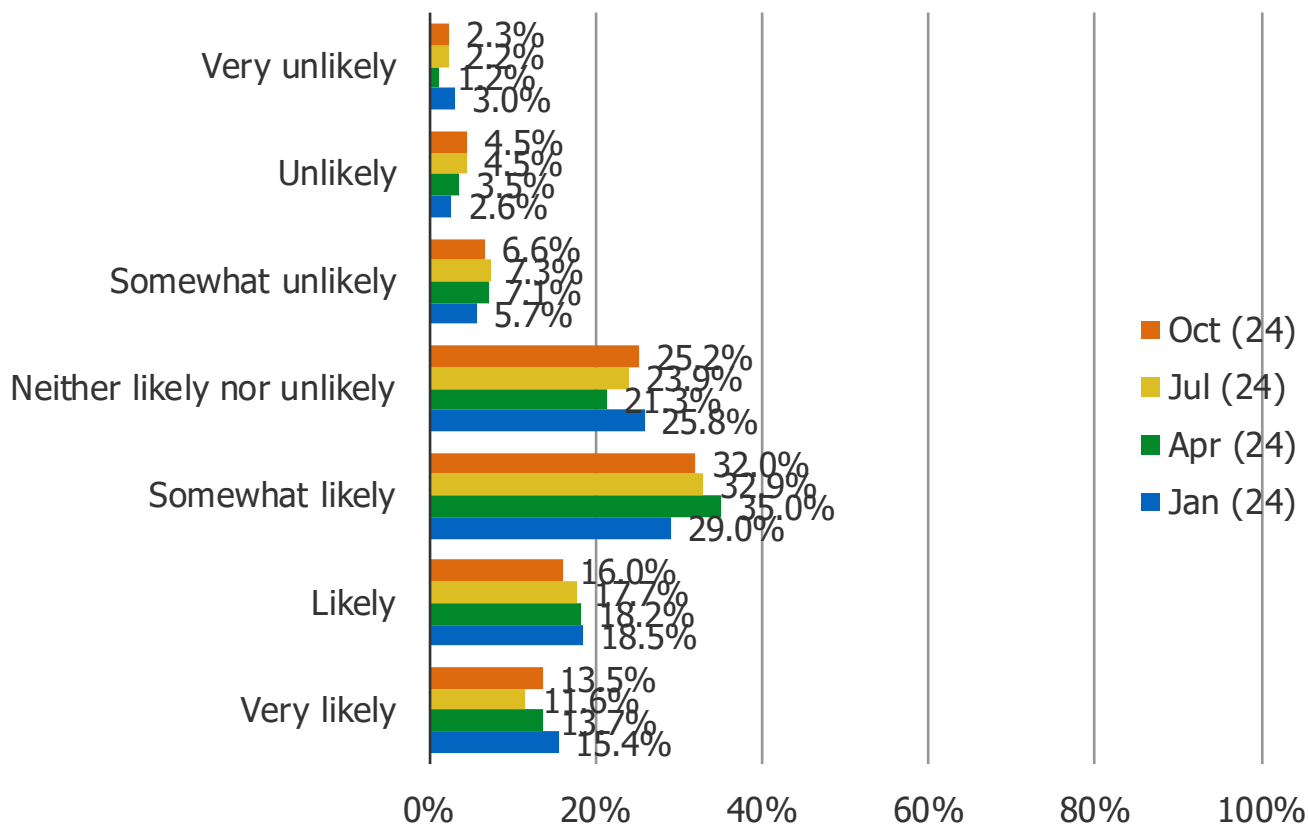
HOW MUCH INTEREST DO YOU TYPICALLY HAVE IN WATCHING HIGH PROFILE BOXING MATCHES?

Posed to all respondents.



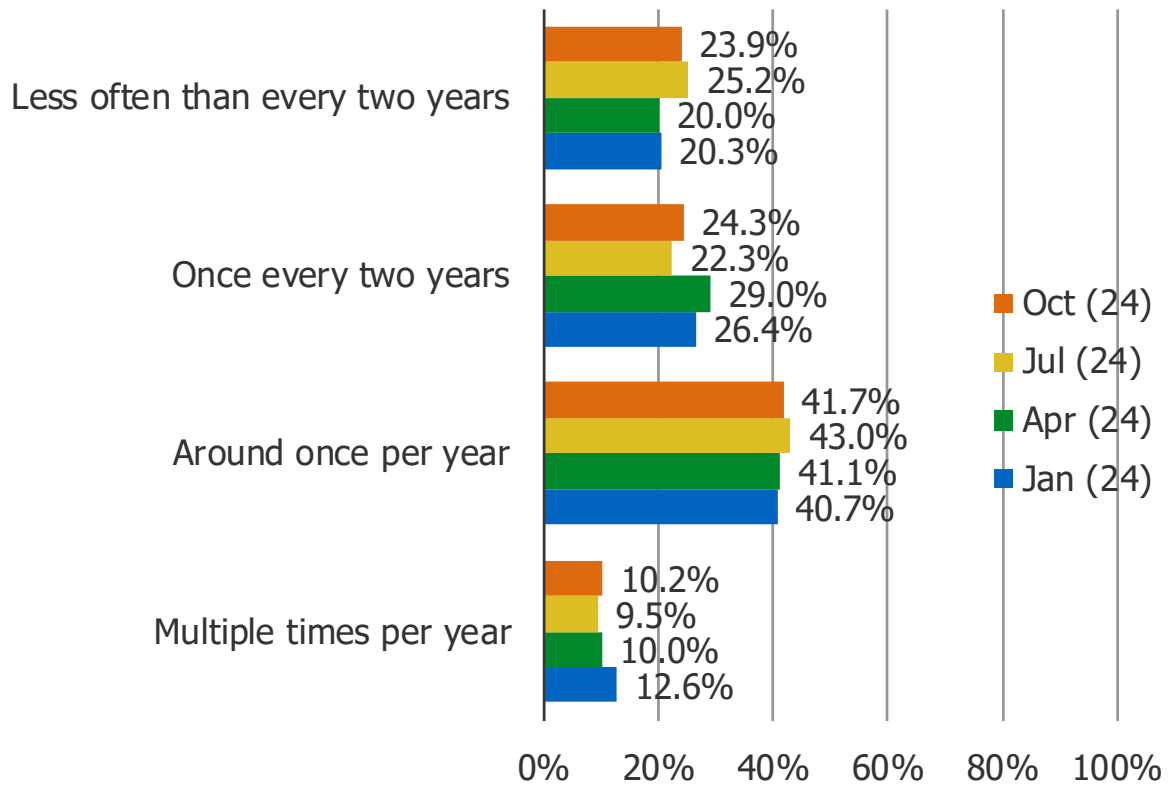
HOW LIKELY DO YOU THINK IT IS THAT NETFLIX WILL INCREASE PRICES IN THE NEXT THREE MONTHS?

Posed to Netflix subscribers.



IN GENERAL, HOW OFTEN DO YOU EXPECT NETFLIX TO INCREASE THEIR PRICES?

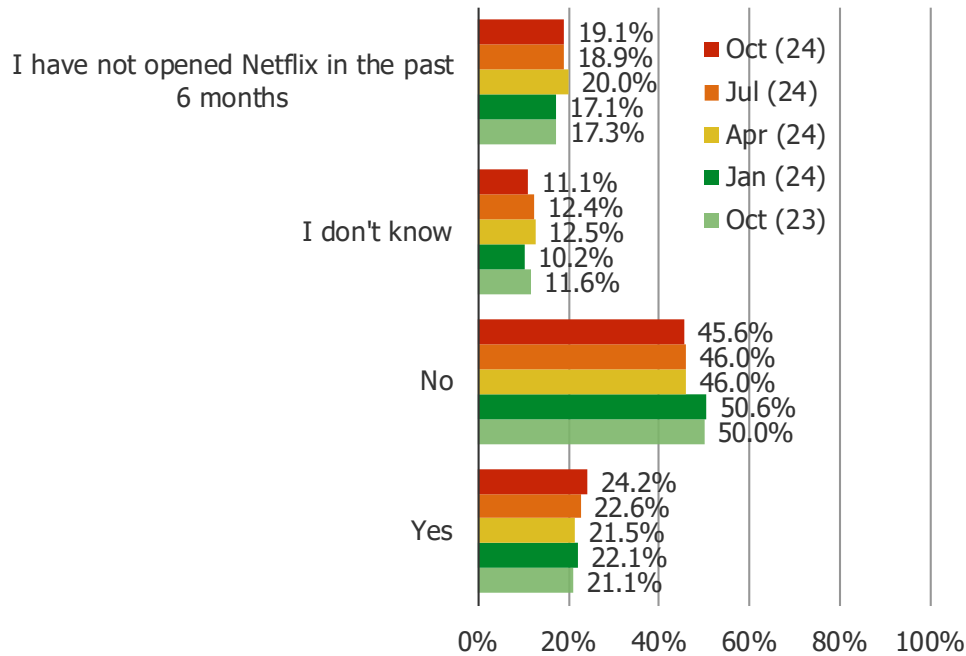
Posed to Netflix subscribers.



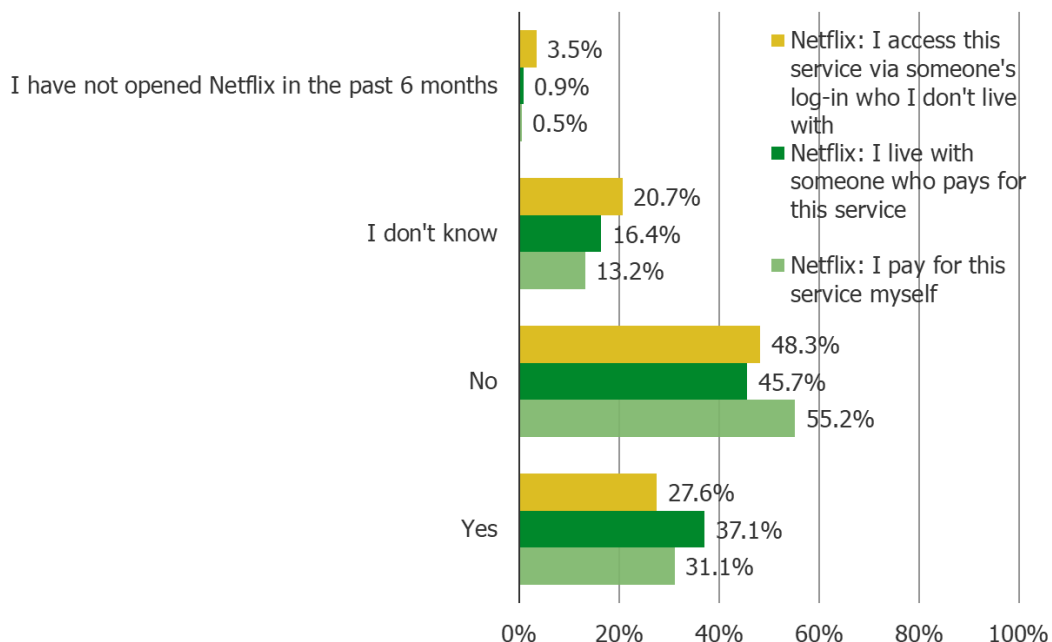
RE-AUTHENTICATING NETFLIX

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...

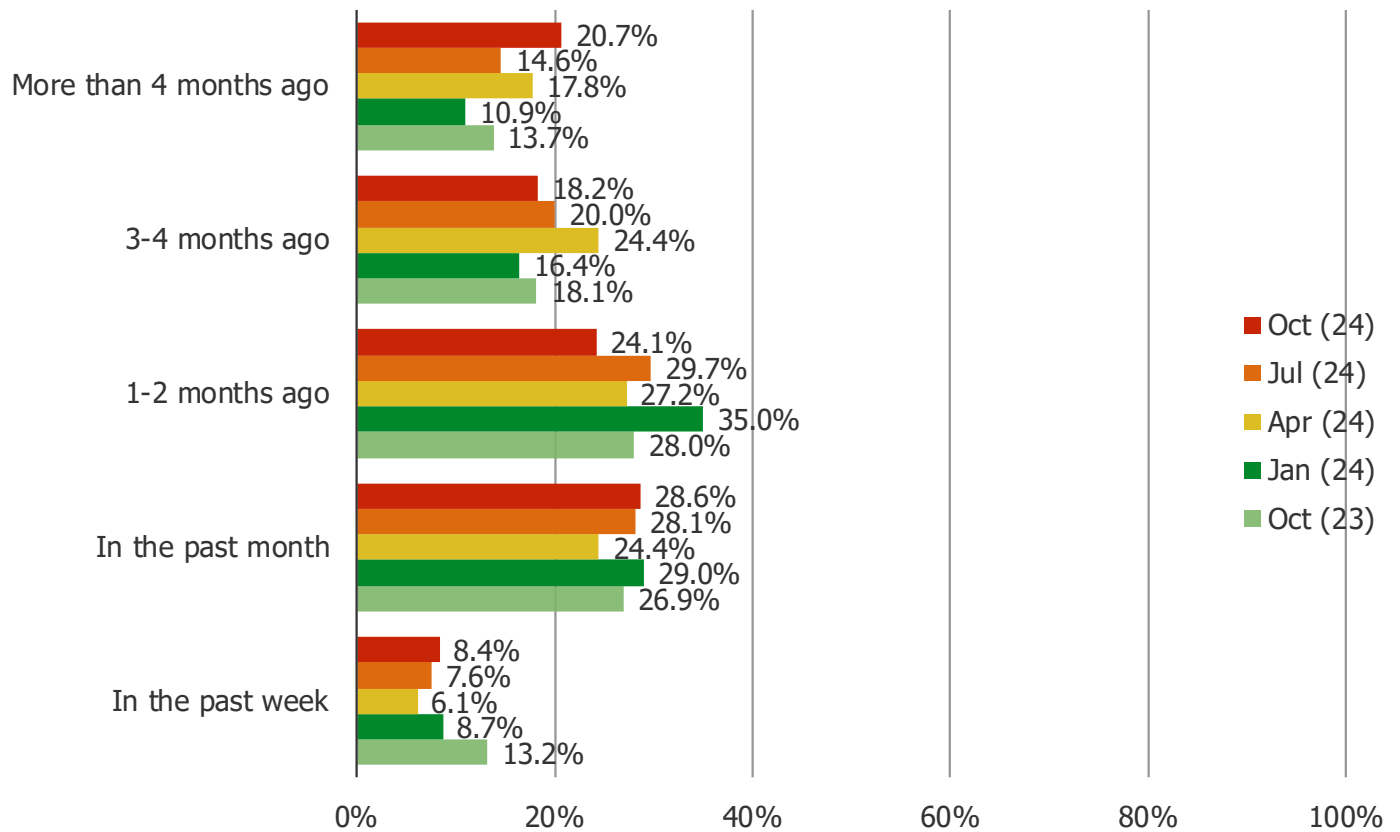


Posed to respondents who watch Netflix, cross-tabbed by how they access Netflix...



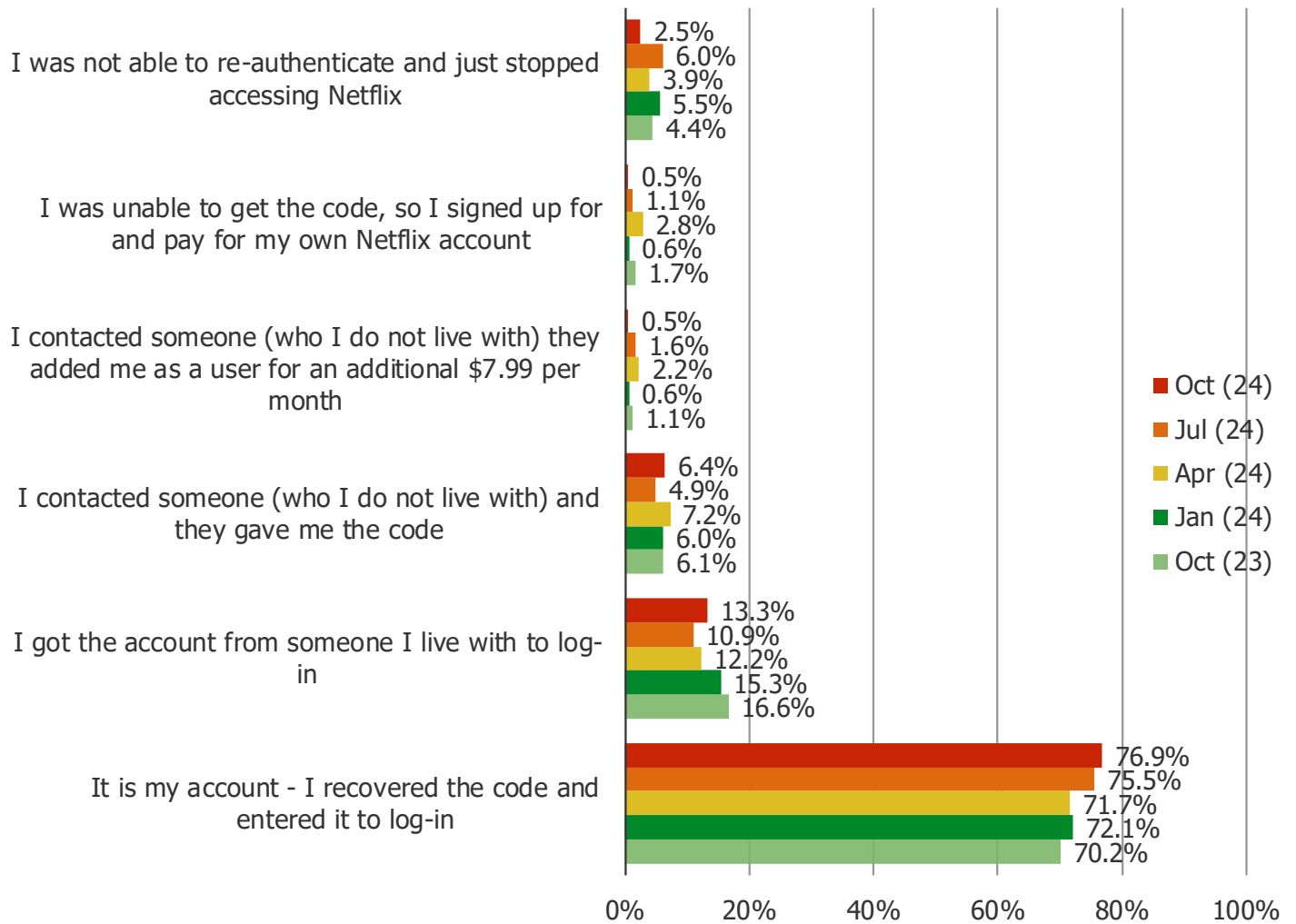
WHEN WERE YOU MOST RECENTLY FORCED TO RE-AUTHENTICATE TO GET INTO NETFLIX?

Posed to respondents who were asked to re-authenticate to access Netflix (N = 188).



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.

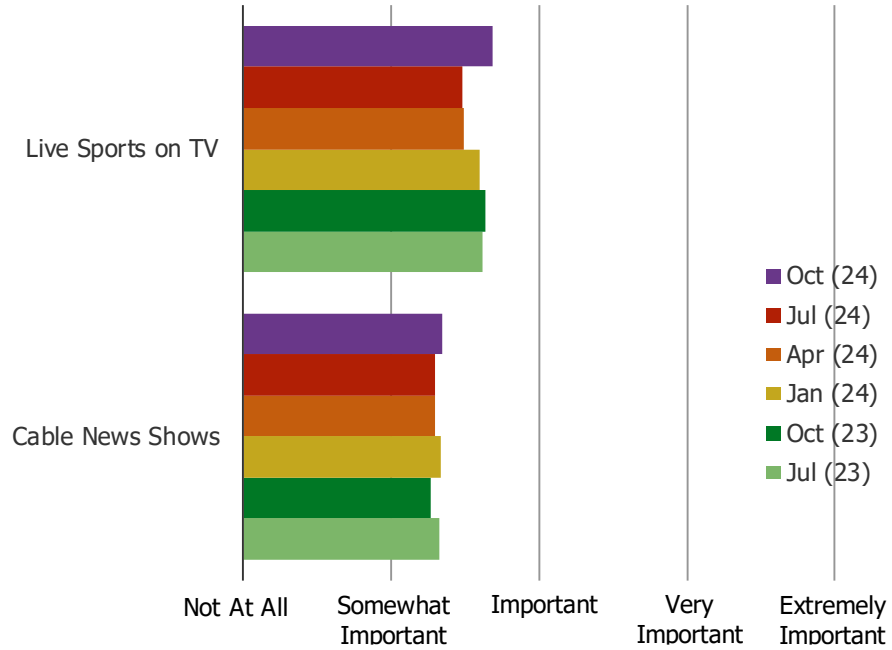
Posed to all respondents who watch movies and/or TV shows through any medium including streaming video providers and were asked to re-authenticate (N = 188).



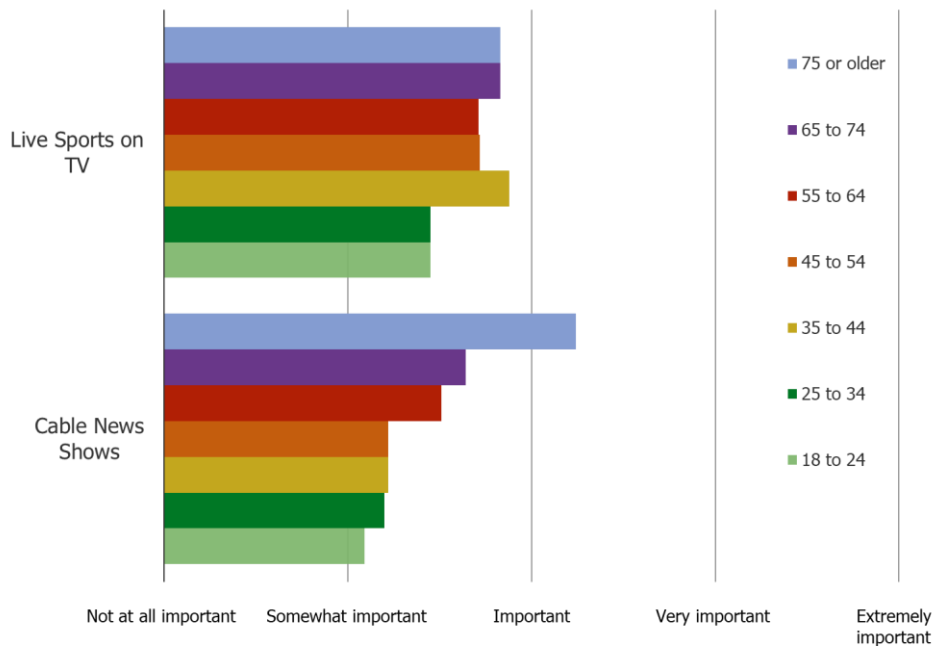
CABLE TV PERSONALITIES AND LIVE SPORTS/EVENTS

HOW IMPORTANT ARE THE FOLLOWING TO YOU...

Posed to all respondents.



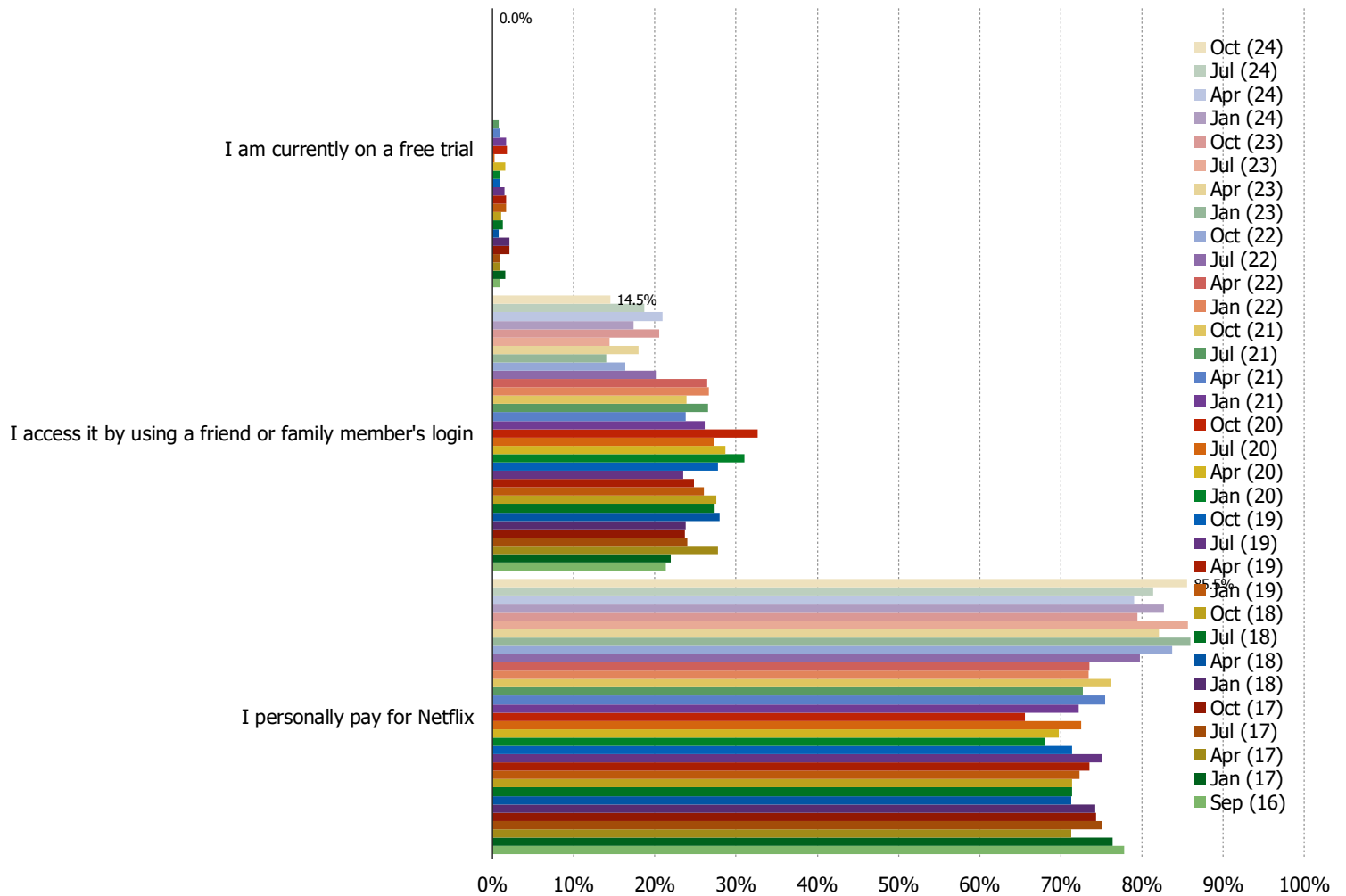
Cross-Tab (Weighted Averages)



NFLX ACCOUNT SHARING

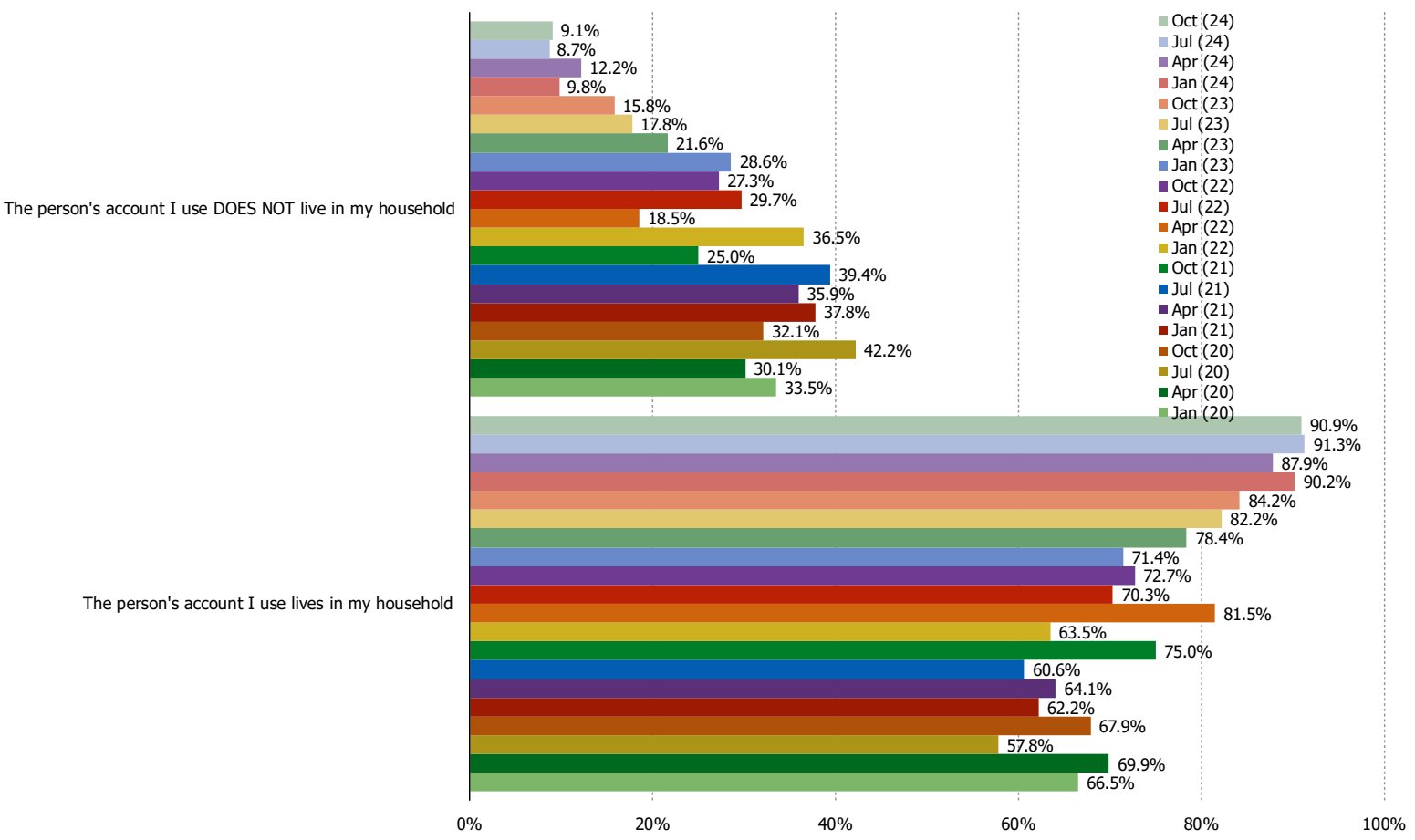
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

Posed to Netflix subscribers.



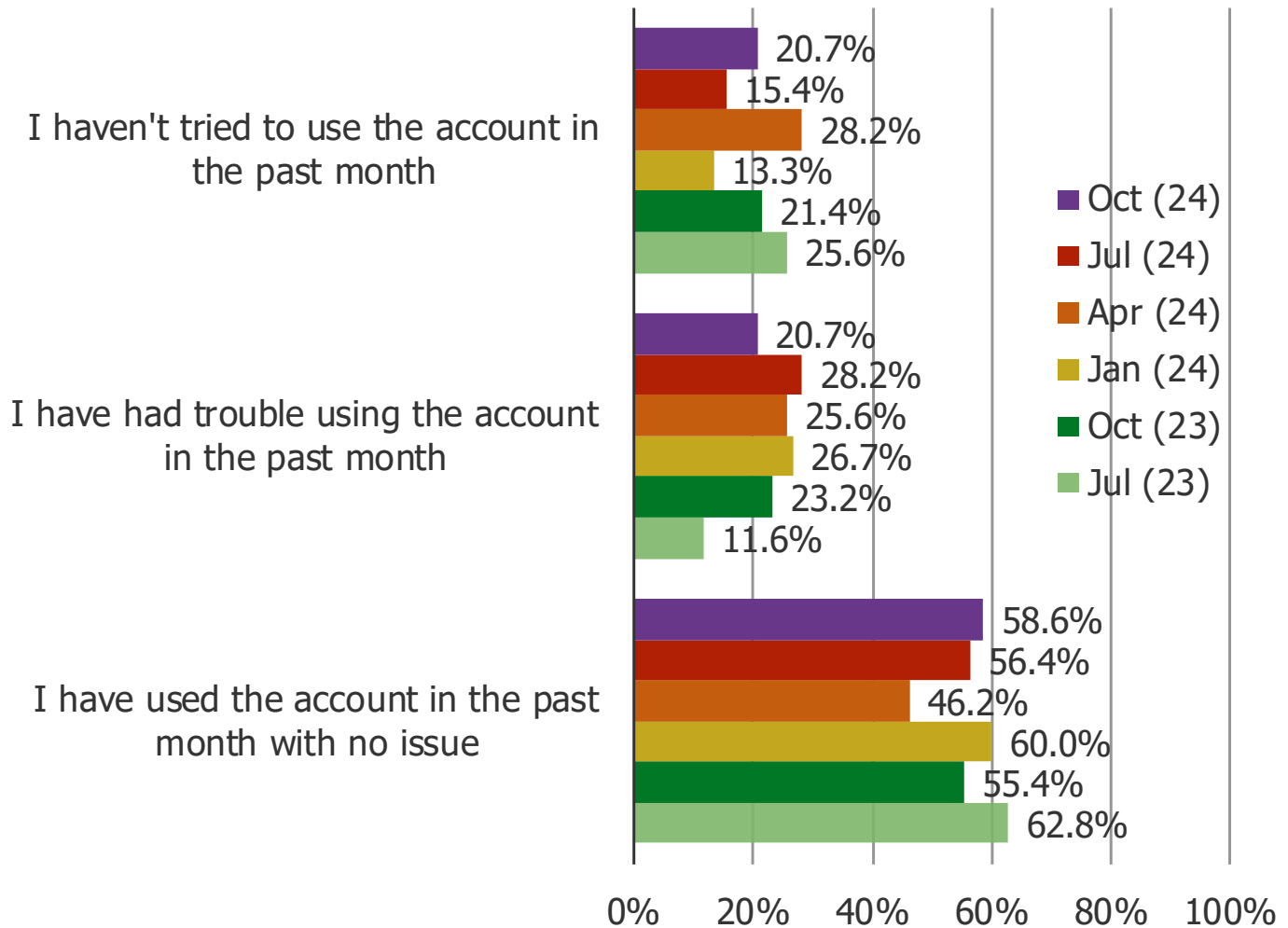
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

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



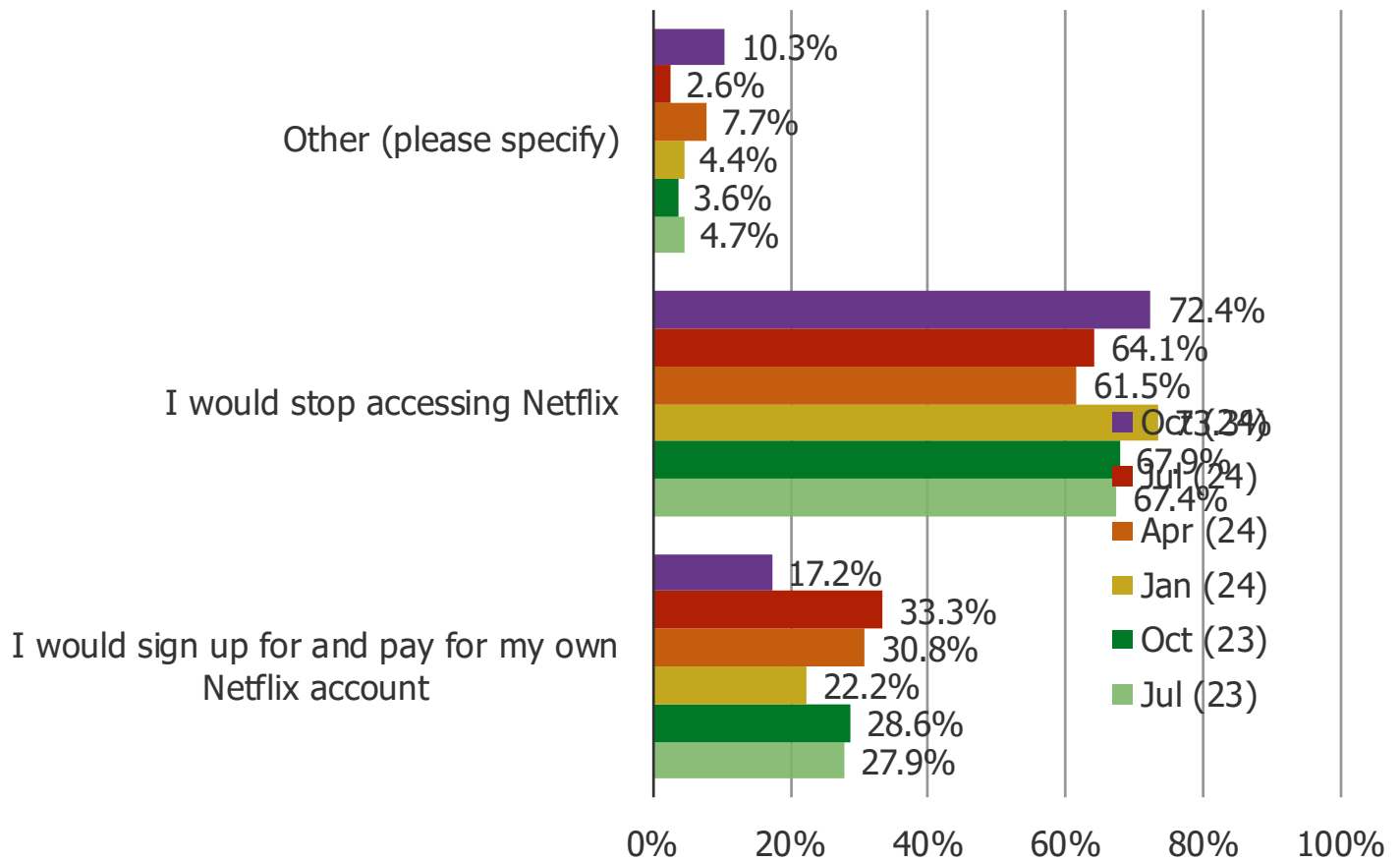
HAVE YOU HAD ANY TROUBLE ACCESSING THE PERSON'S NETFLIX ACCOUNT WHO YOU TYPICALLY USE?

Posed to respondents who said they access someone else's account who they do not live with (N = 25)



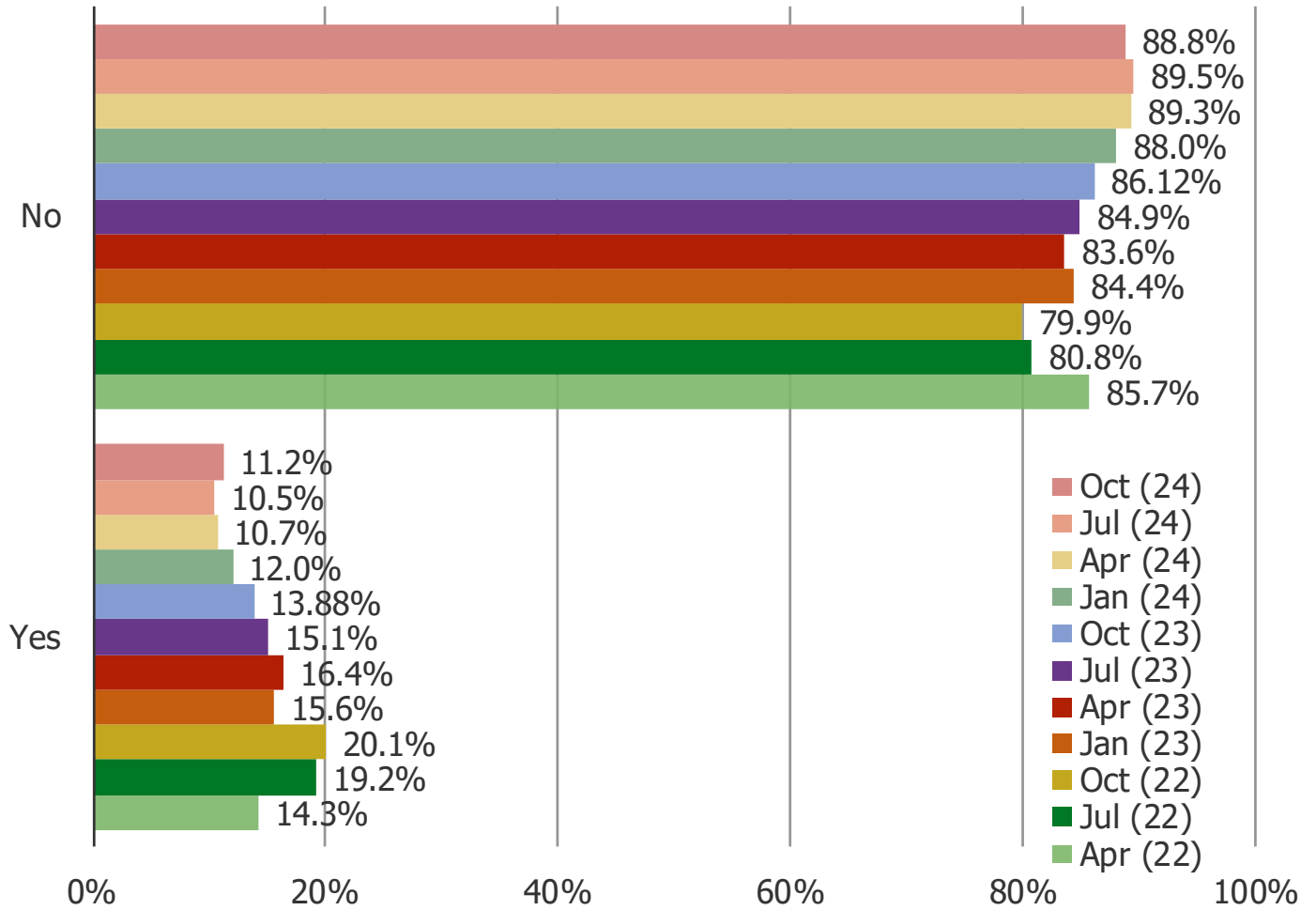
WHICH OF THE FOLLOWING WOULD YOU DO IF NETFLIX NO LONGER ALLOWED THE PERSON WHOSE ACCOUNT YOU ACCESS TO SHARE THEIR NETFLIX ACCOUNT WITH YOU FOR FREE

Posed to respondents who said they access someone else’s account who they do not live with (N = 25)



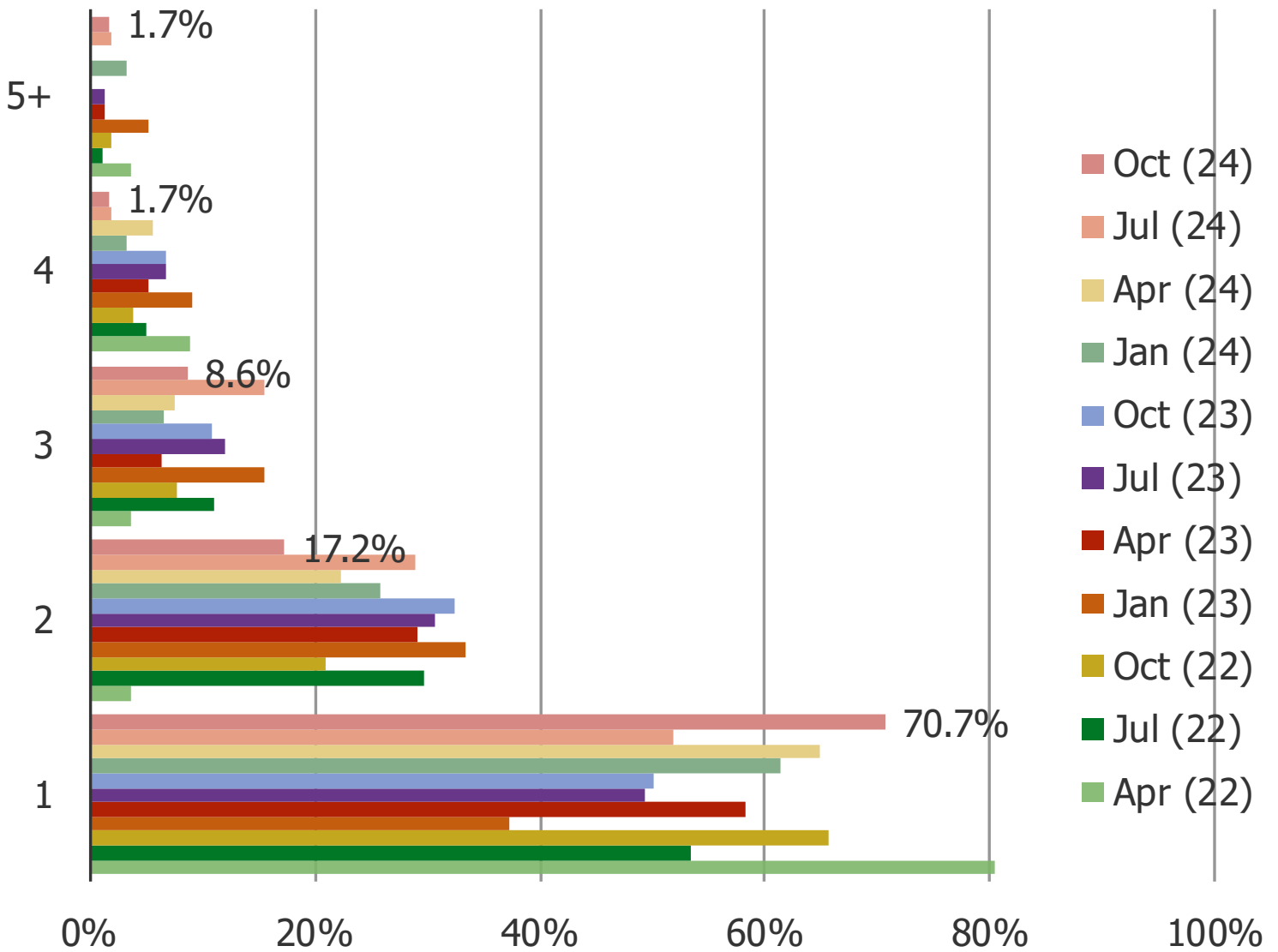
DO YOU LET ANYONE LIVING OUTSIDE OF YOUR HOUSEHOLD USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix or lives with someone who pays for Netflix (N=490).



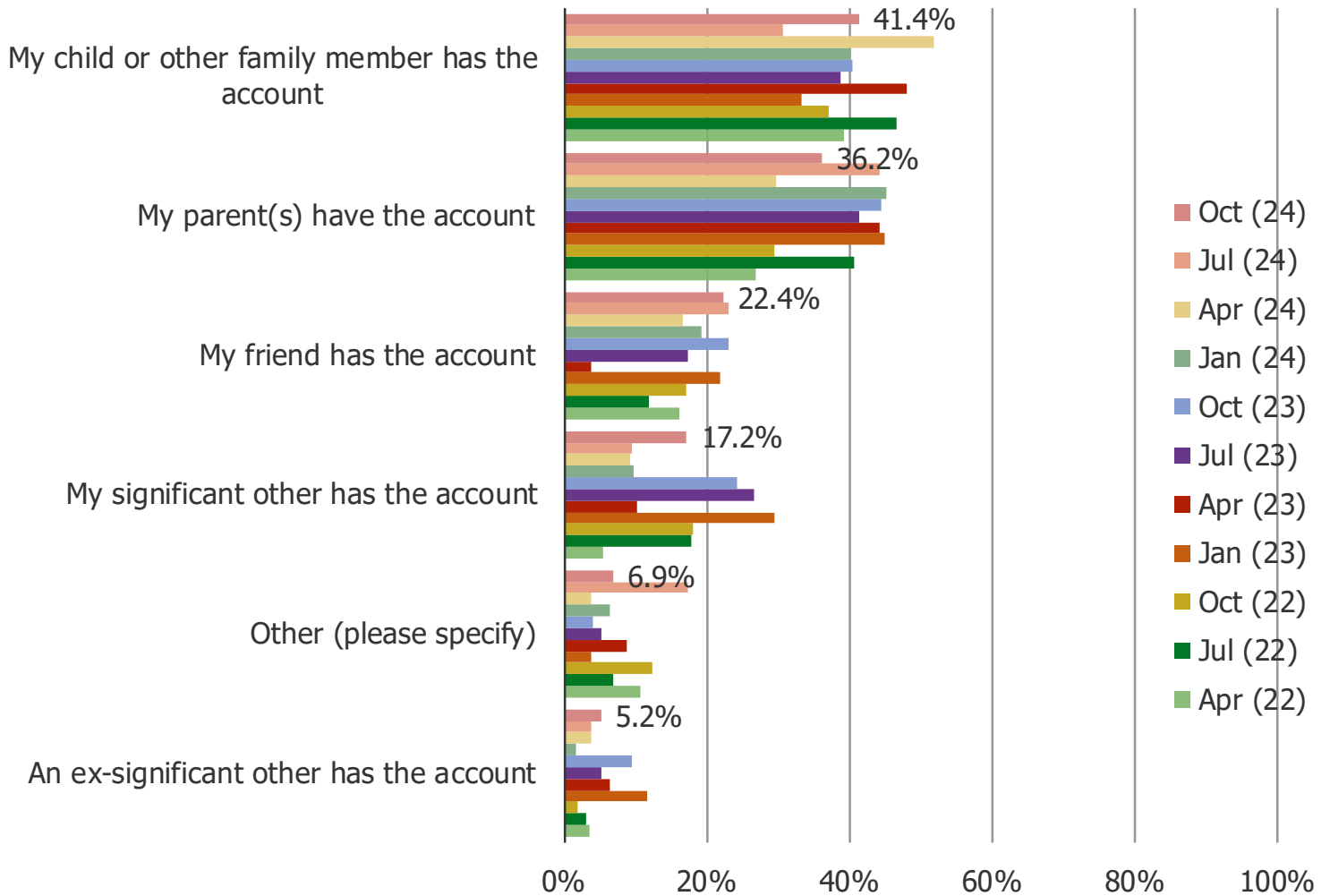
HOW MANY PEOPLE WHO LIVE OUTSIDE OF YOUR HOUSEHOLD DO YOU LET USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 51)



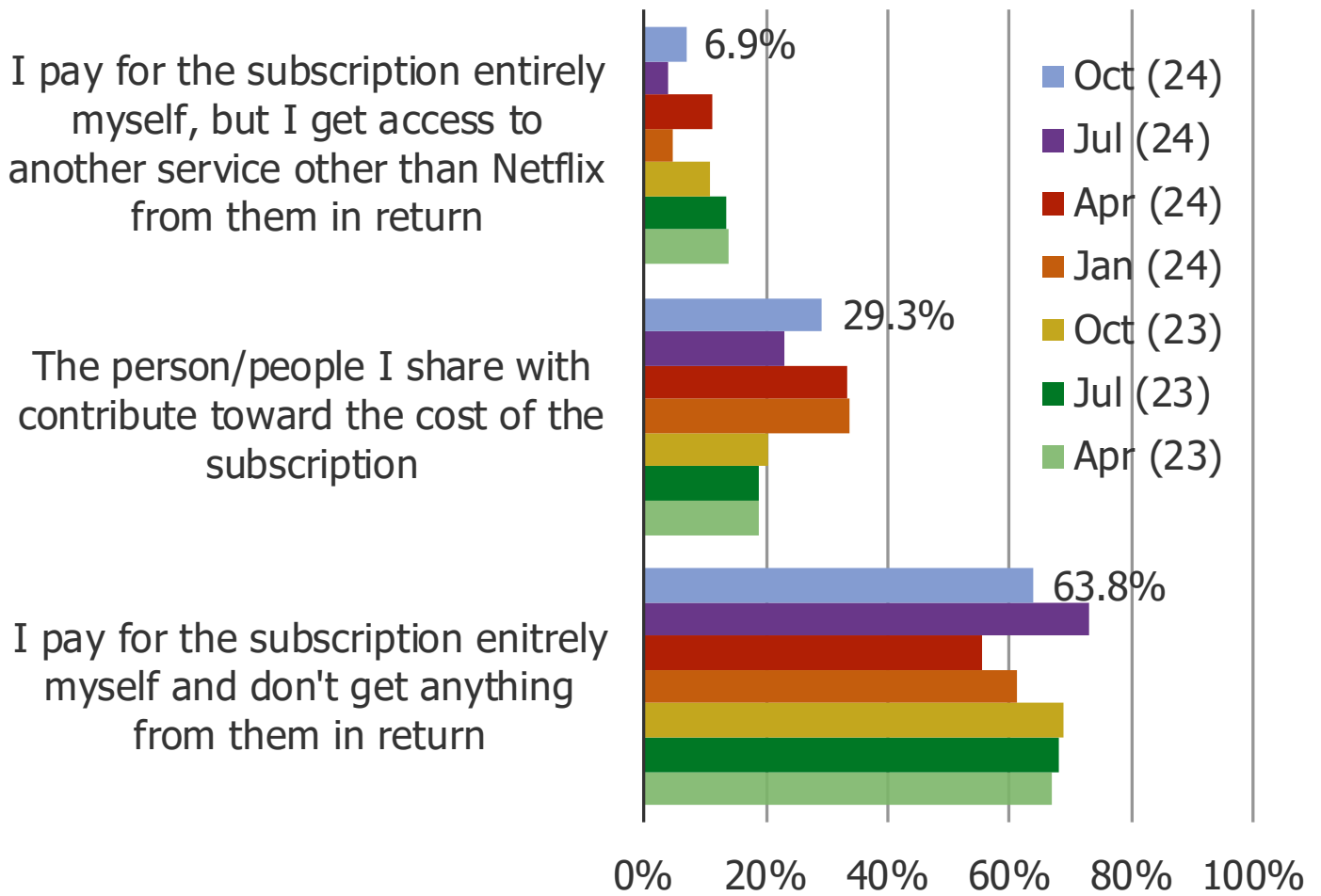
WHAT IS YOUR RELATION TO THE PERSON WHOSE NETFLIX ACCOUNT YOU ACCESS?

Posed to respondents who access someone’s Netflix account who they do not live with (N =51).



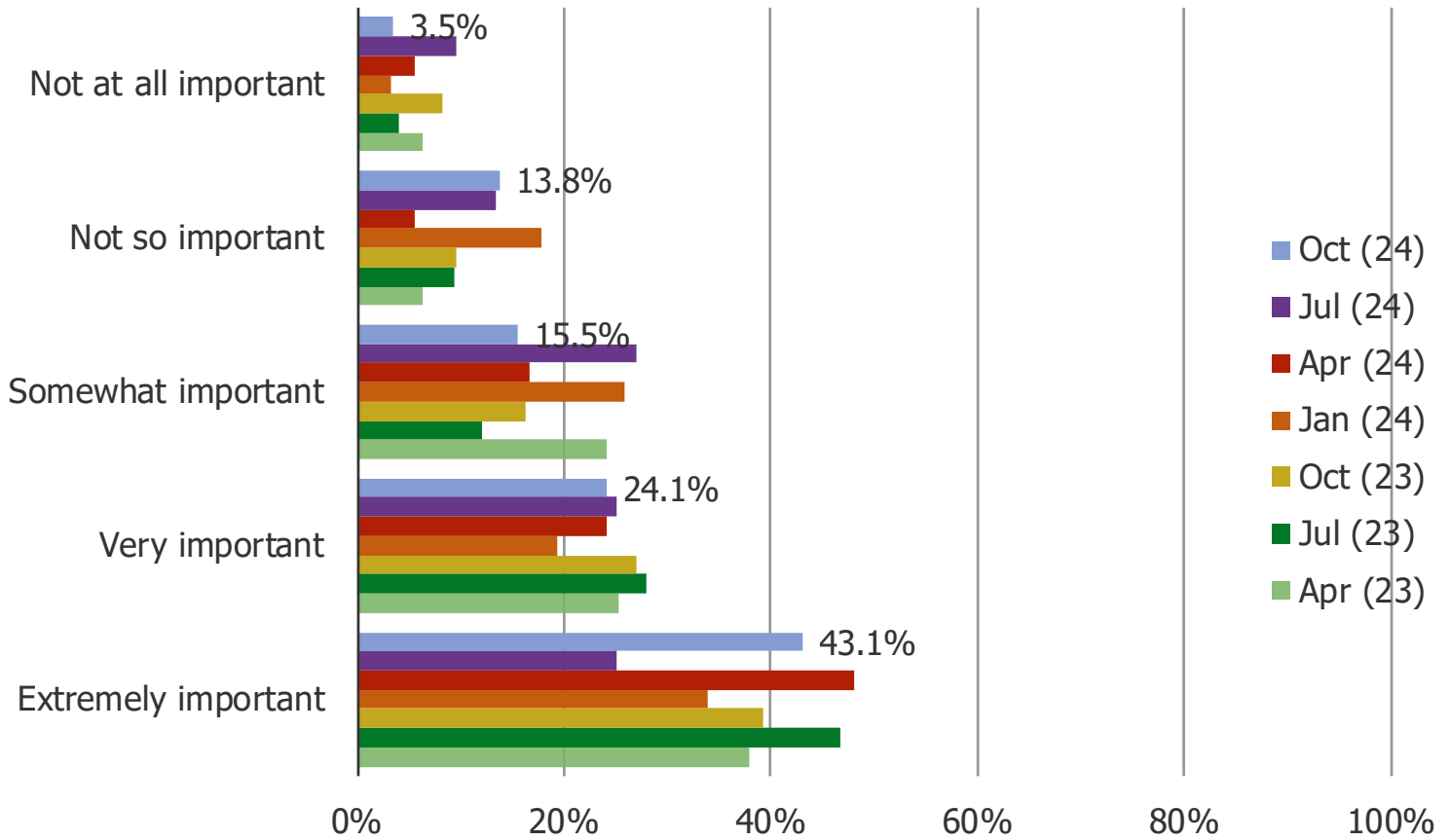
THINKING OF THE PERSON/PEOPLE YOU SHARE YOUR ACCOUNT WITH, WHO PAYS FOR THE SUBSCRIPTION?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=51)



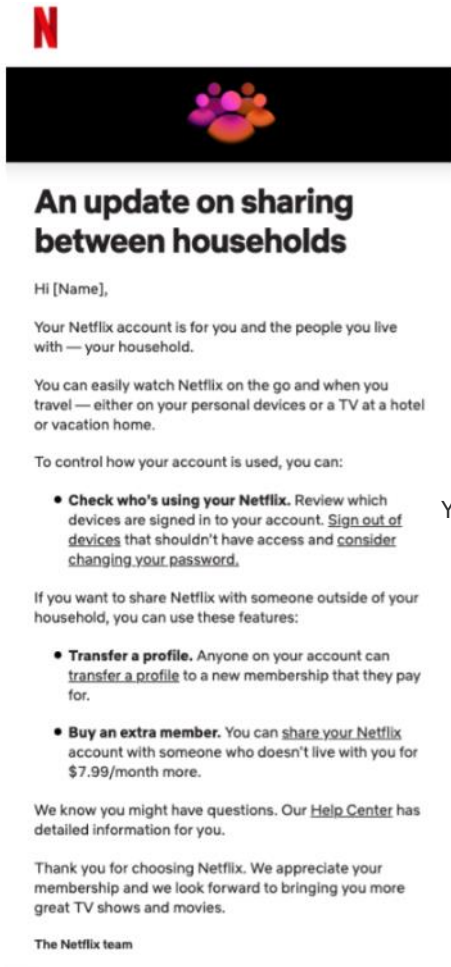
HOW IMPORTANT IS IT TO YOU TO BE ABLE TO SHARE YOUR NETFLIX ACCOUNT WITH PEOPLE WHO LIVE OUTSIDE OF YOUR HOME?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=51)



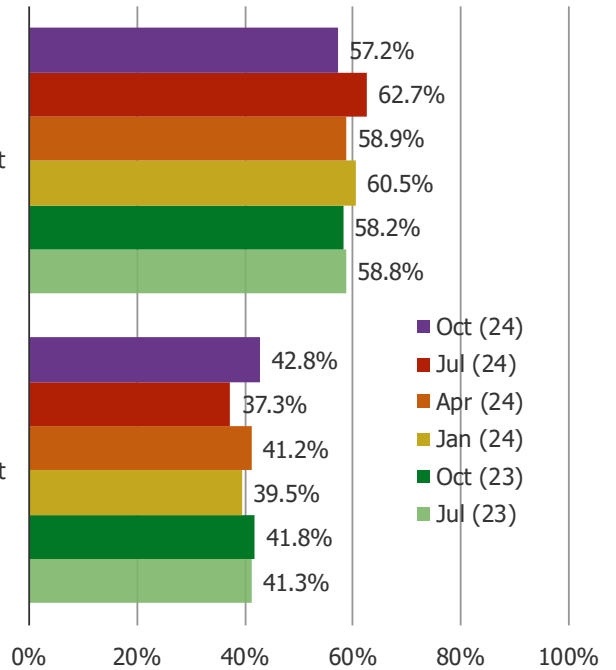
HAVE YOU RECEIVED AN EMAIL LIKE THE ONE BELOW FROM NETFLIX IN THE PAST 1-2 MONTHS?

Posed to paying Netflix subscribers (N = 490)



No, I don't recall seeing an email like that

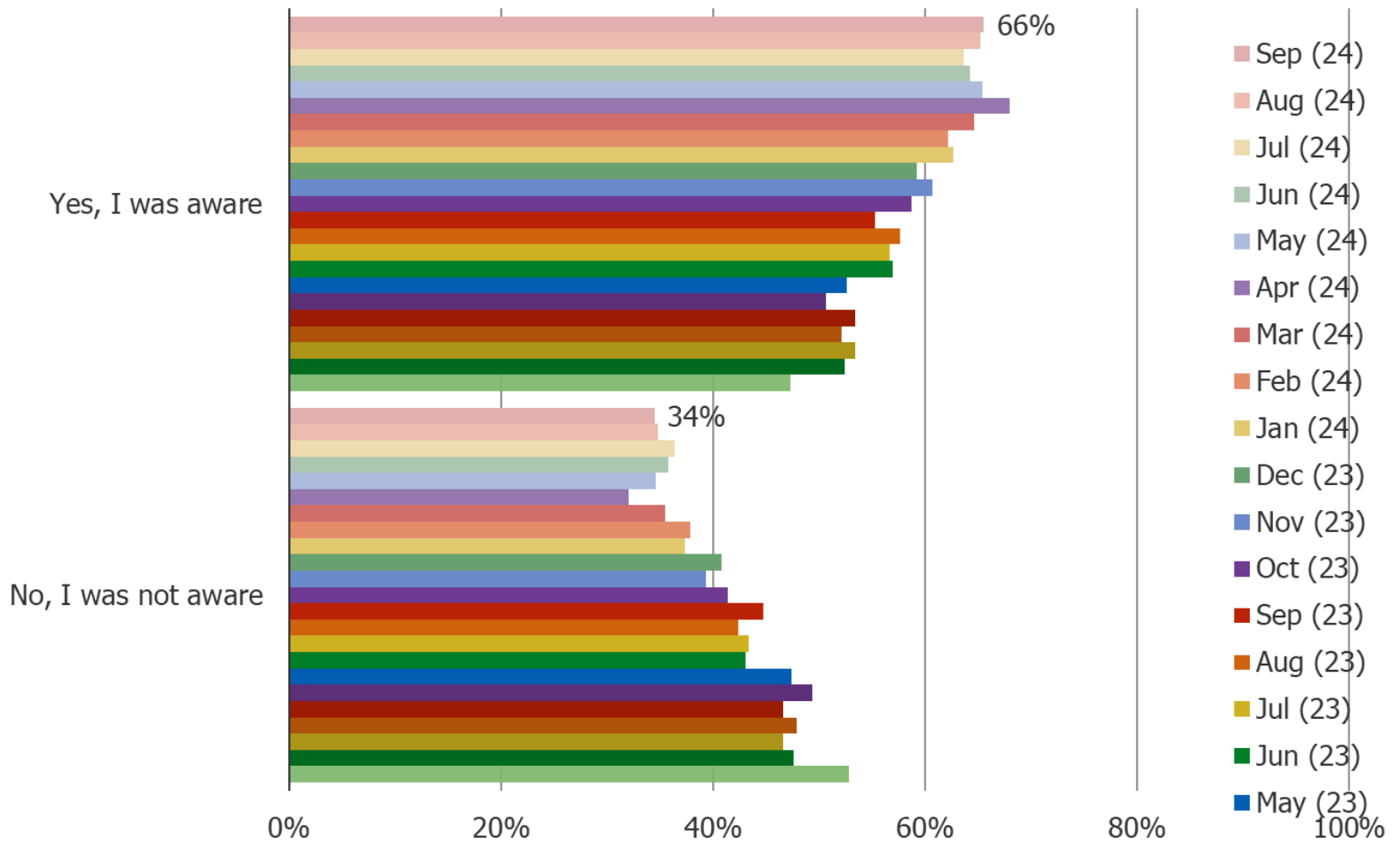
Yes, I remember receiving an email like that



STANDARD WITH ADS

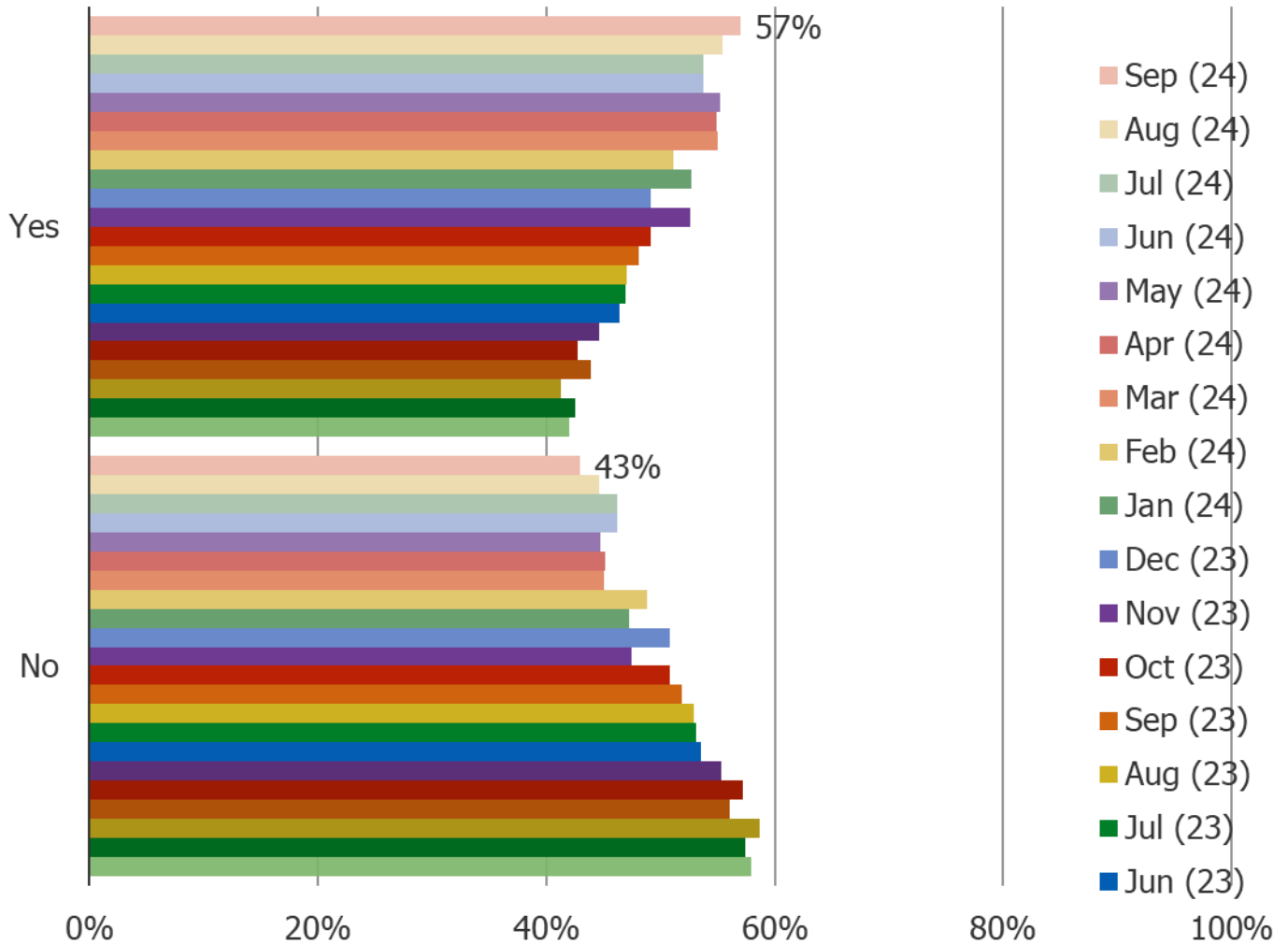
BEFORE TAKING THIS SURVEY, WERE YOU AWARE THAT NETFLIX HAS AN AD-SUPPORTED TIER WITH COMMERCIALS?

Posed to all respondents.



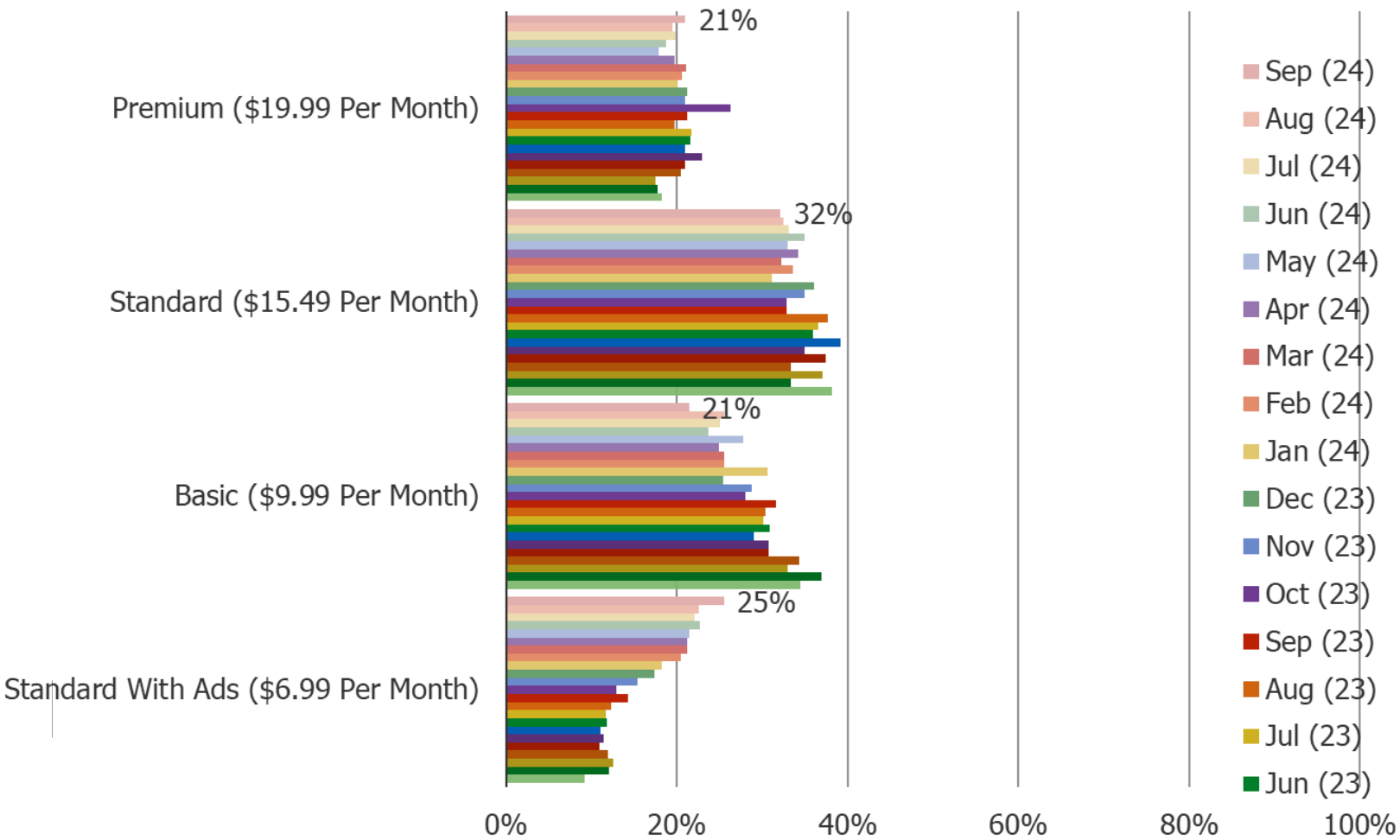
BEFORE TAKING THIS SURVEY, WERE YOU AWARE THAT DISNEY+ HAS AN AD-SUPPORTED TIER WITH COMMERCIALS?

Posed to all respondents.



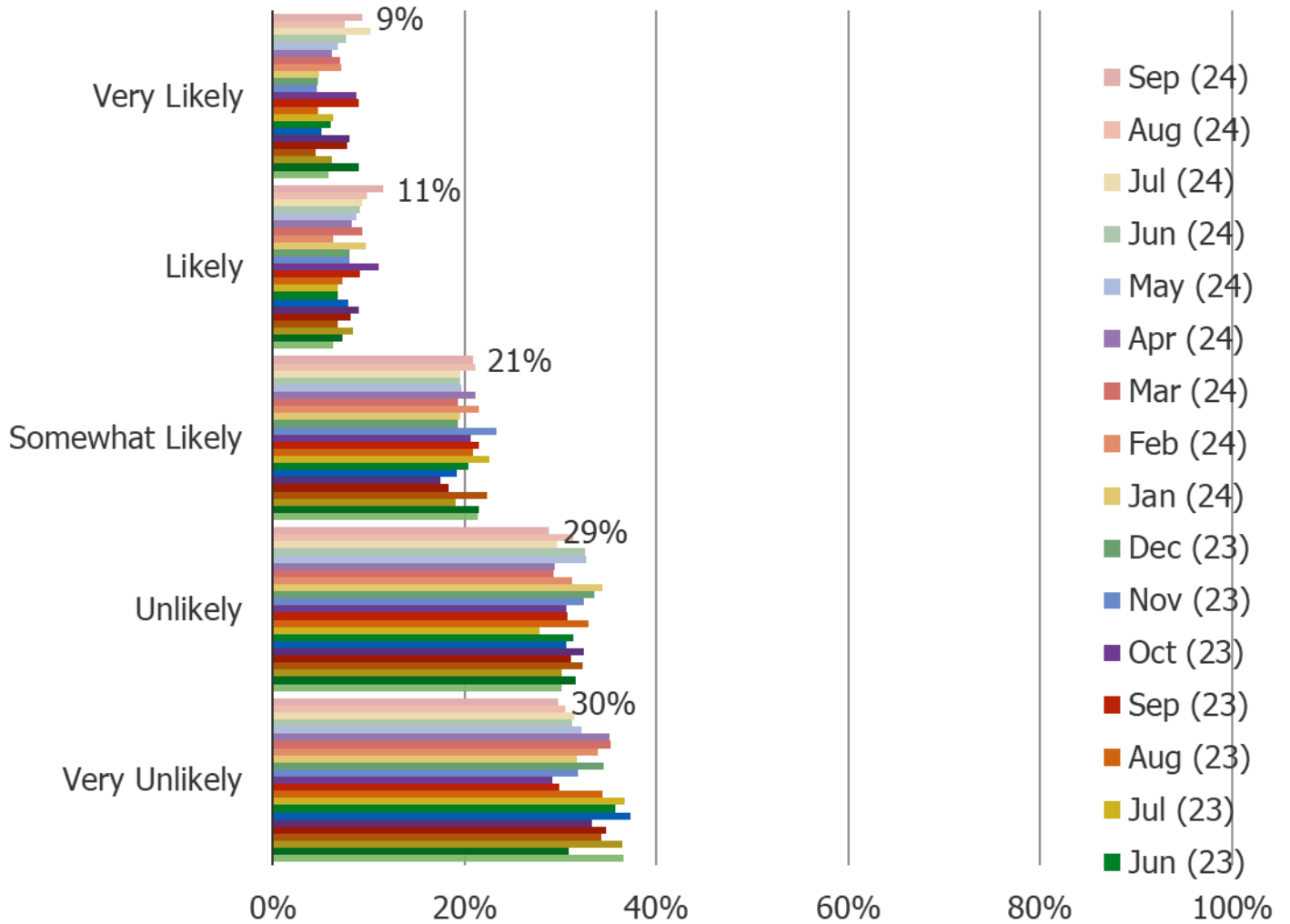
WHICH OF THE FOLLOWING MOST ACCURATELY DESCRIBES YOUR NETFLIX SUBSCRIPTION?

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?

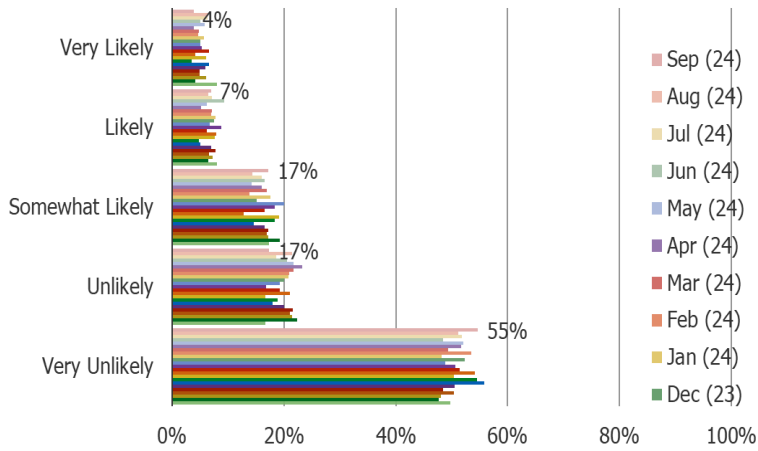
Posed to all respondents who are Netflix subscribers but are not on the ad supported plan.



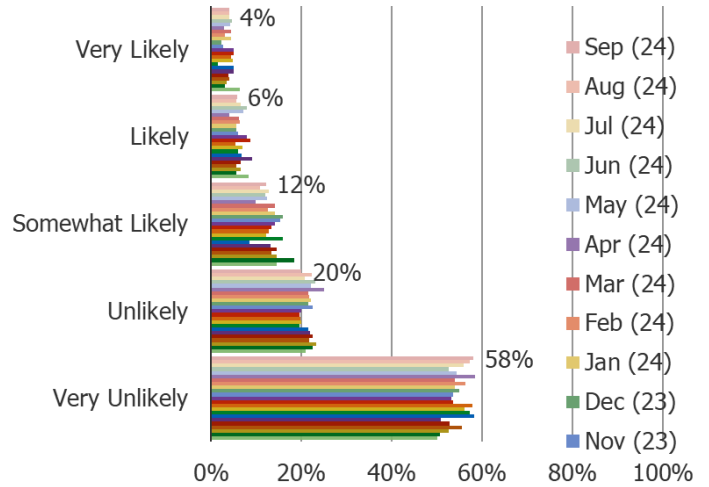
HOW LIKELY ARE YOU TO SIGN UP FOR THE FOLLOWING NETFLIX PLANS IN THE NEXT MONTH?

Posed to all respondents who are not currently Netflix subscribers.

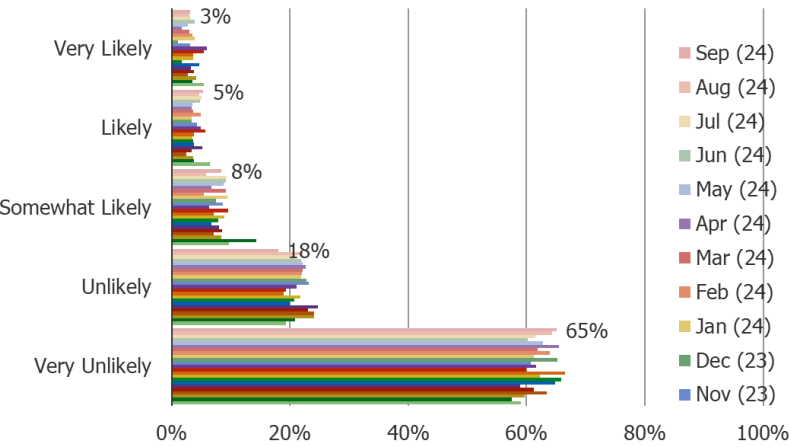
Standard with Ads



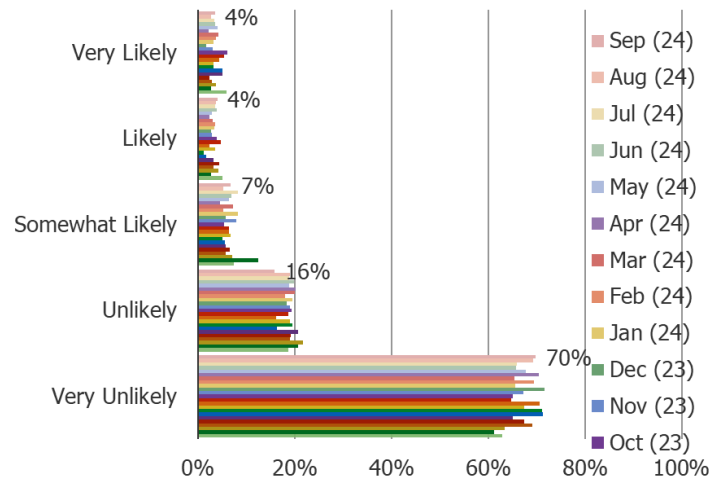
Basic



Standard

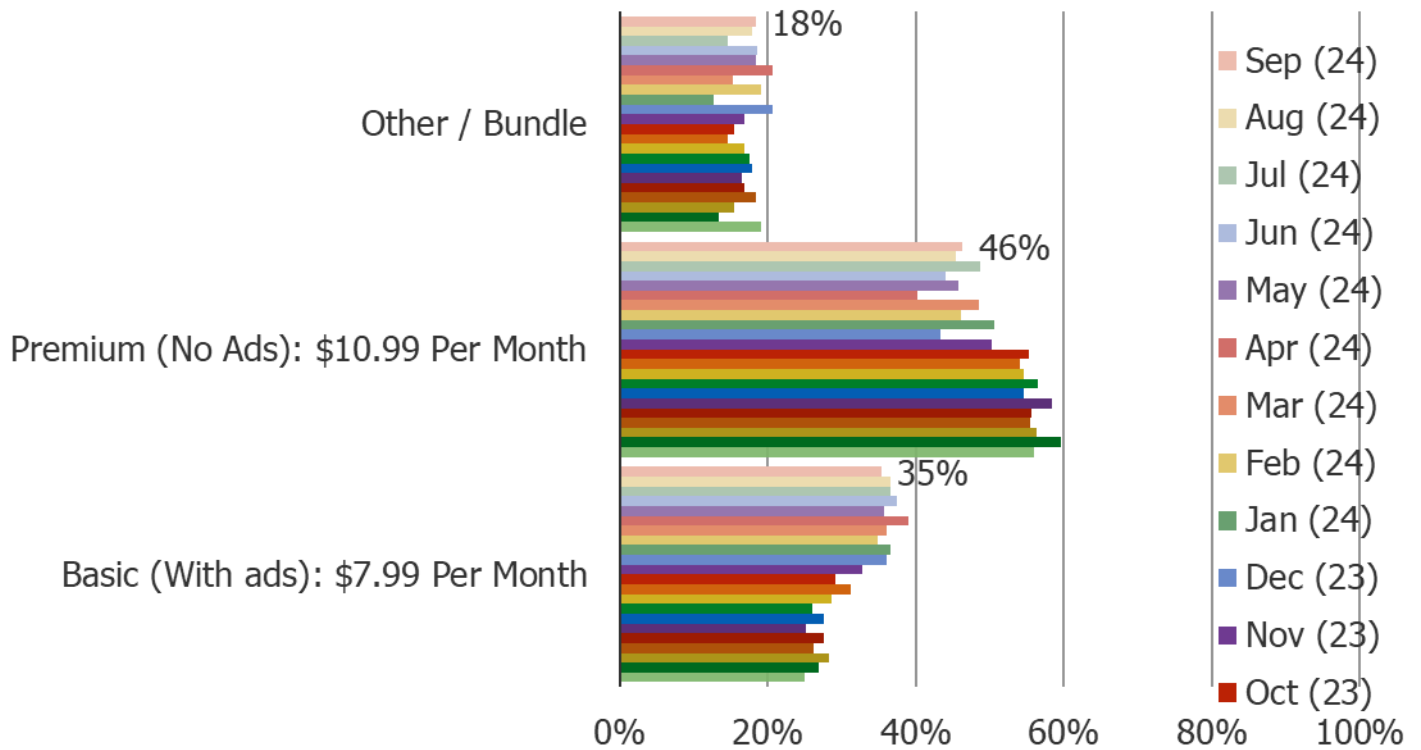


Premium



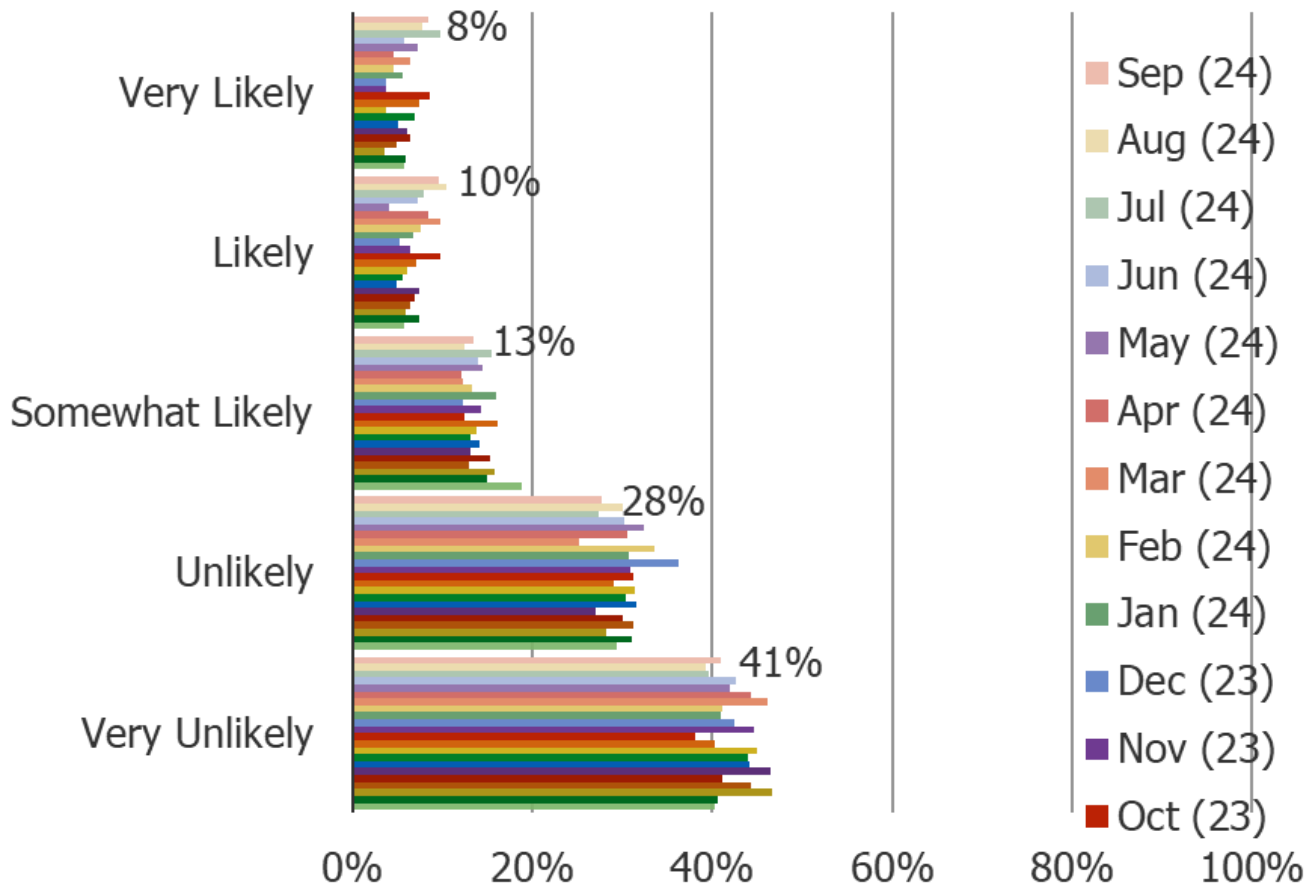
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR DISNEY+ SUBSCRIPTION?

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?

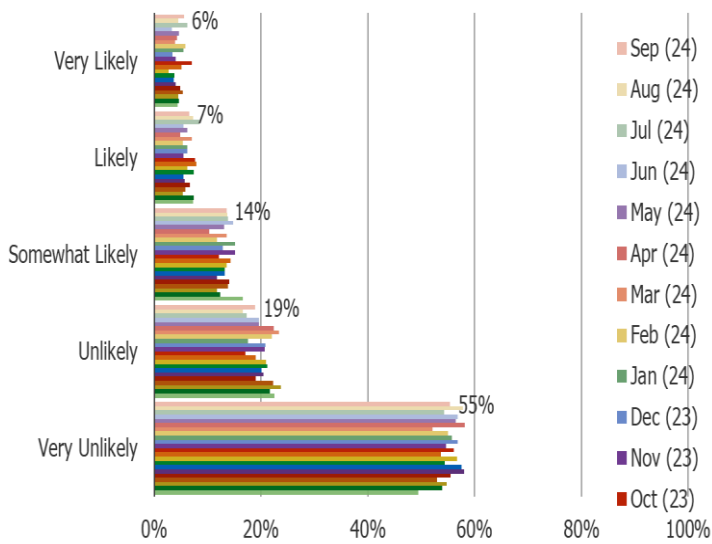
Posed to all respondents who are Disney+ subscribers but are not on the ad supported plan currently.



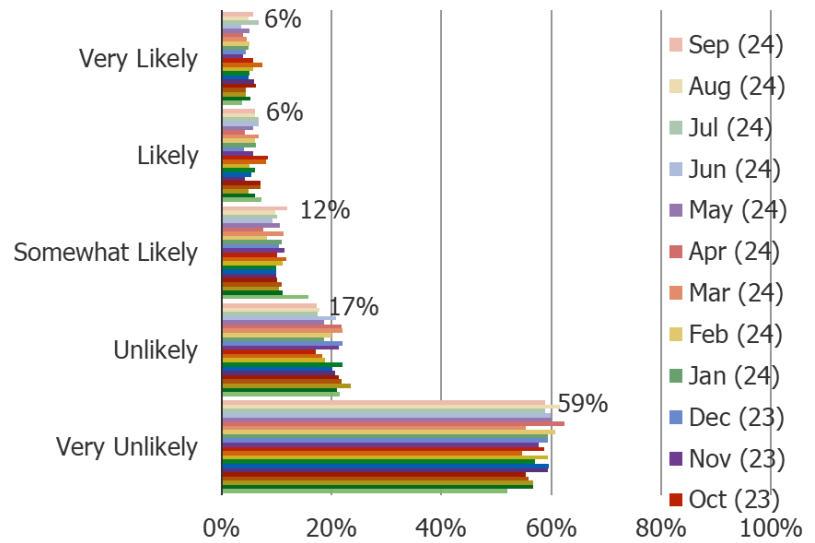
HOW LIKELY ARE YOU TO SIGN UP FOR THE FOLLOWING DISNEY+ PLANS IN THE NEXT MONTH?

Posed to respondents who are not currently Disney+ subscribers.

Basic (With ads): \$7.99 Per Month

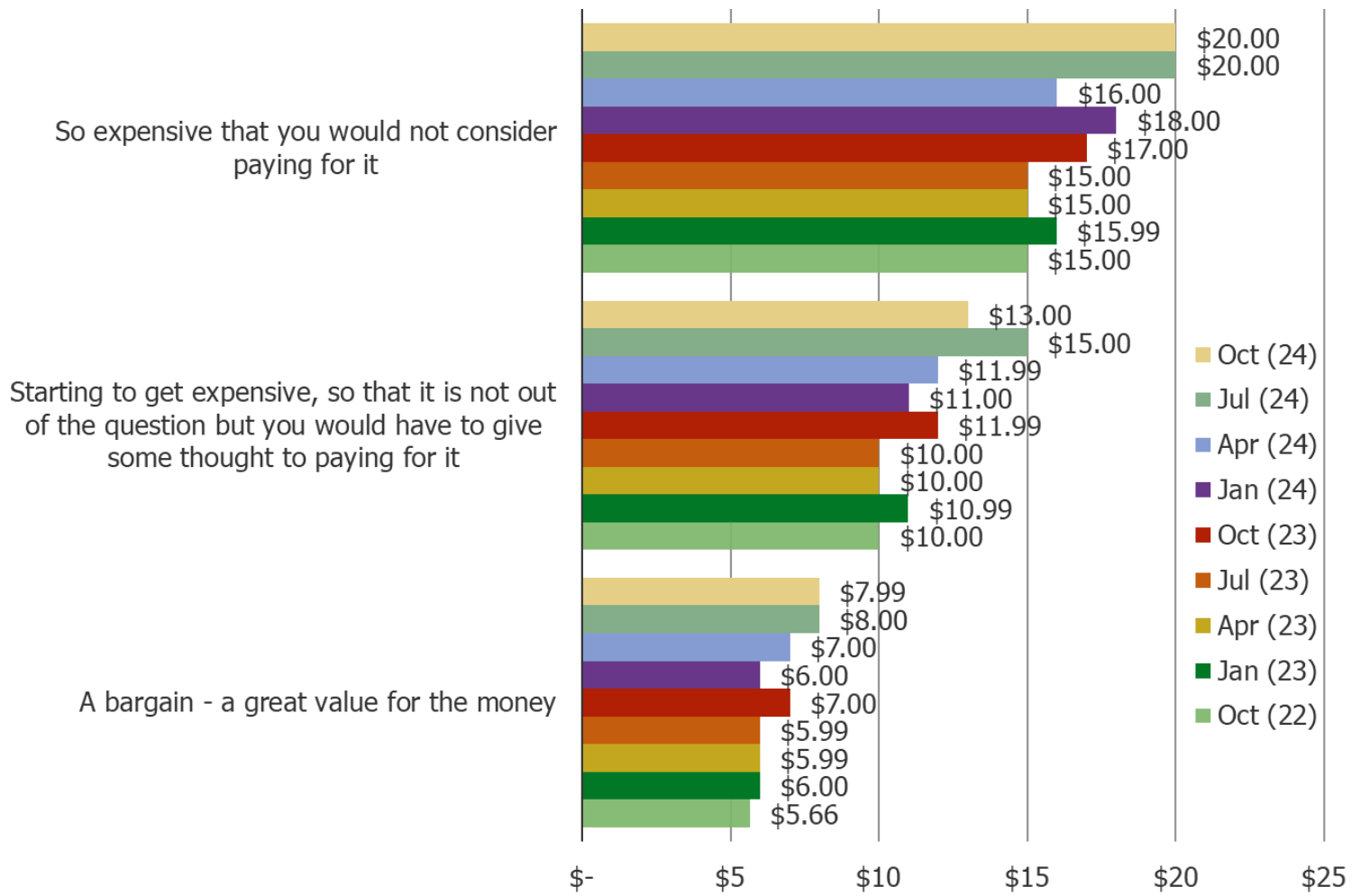


Premium (No Ads): \$10.99 Per Month



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

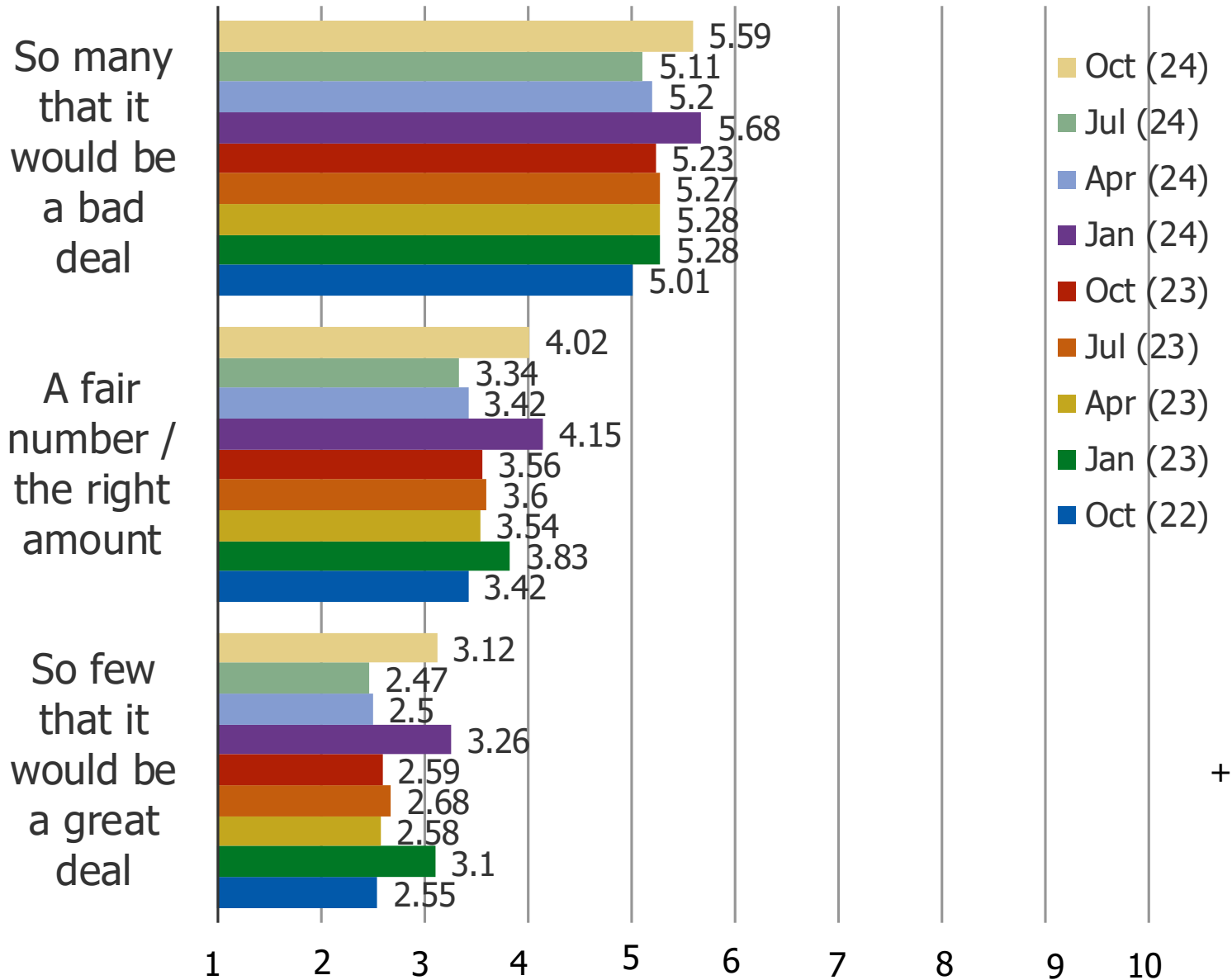
Posed to respondents who watch movies and/or TV shows at home (N = 813)



*Median

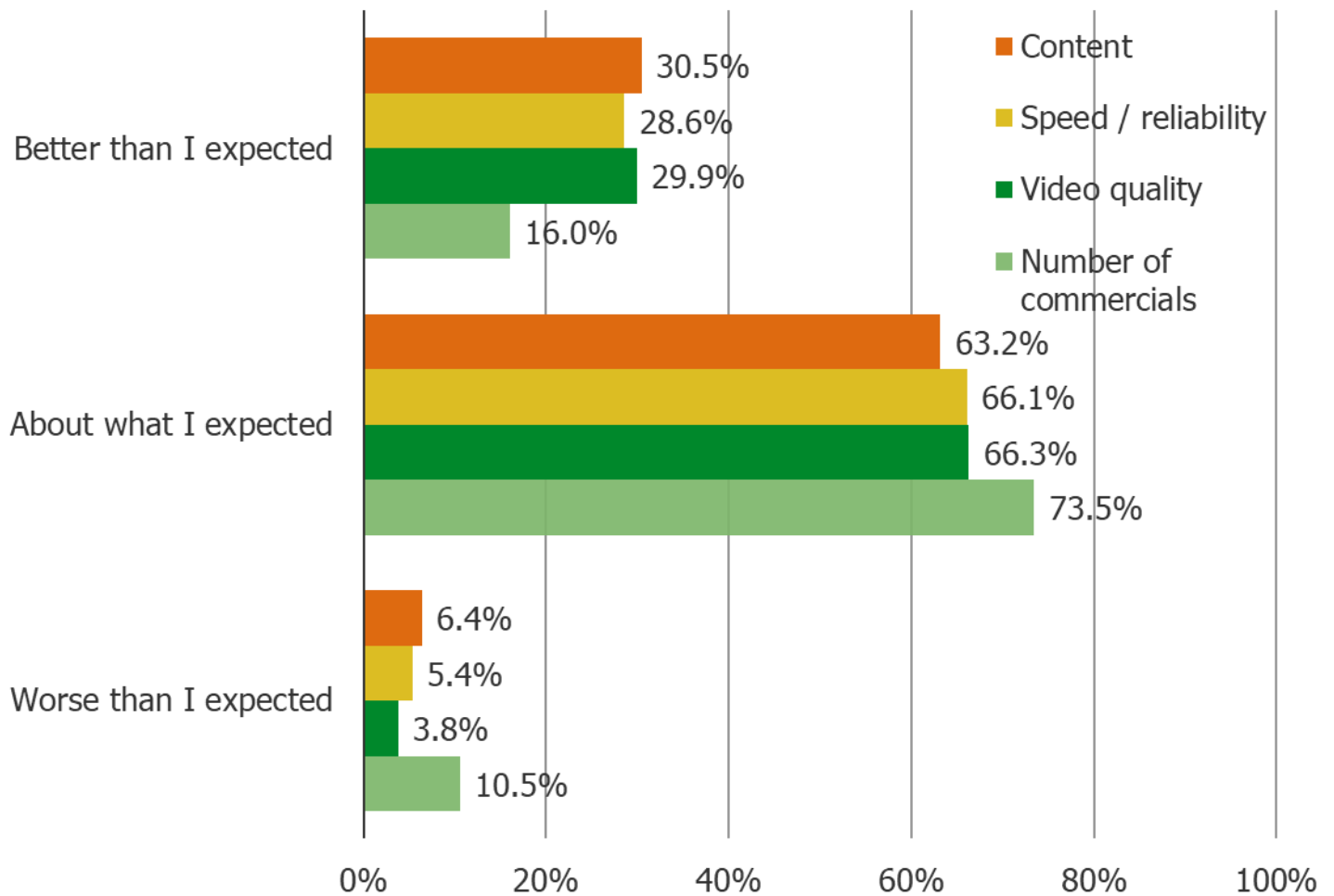
THINKING ABOUT NETFLIX'S AD-SUPPORTED TIER, HOW MANY COMMERCIALS PER HOUR WOULD YOU CONSIDER TO BE...

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 887



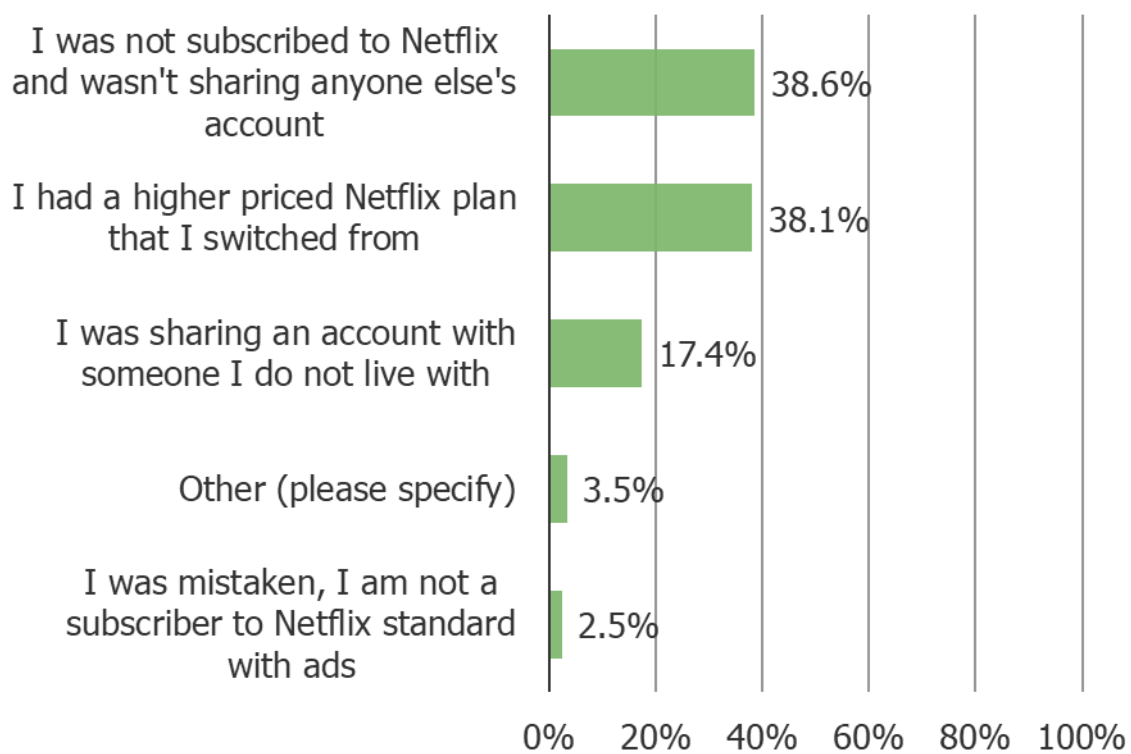
HOW DOES YOUR EXPERIENCE WITH THE STANDARDS WITH ADS PLAN COMPARE TO YOUR EXPECTATIONS WHEN IT COMES TO THE FOLLOWING?

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 893



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

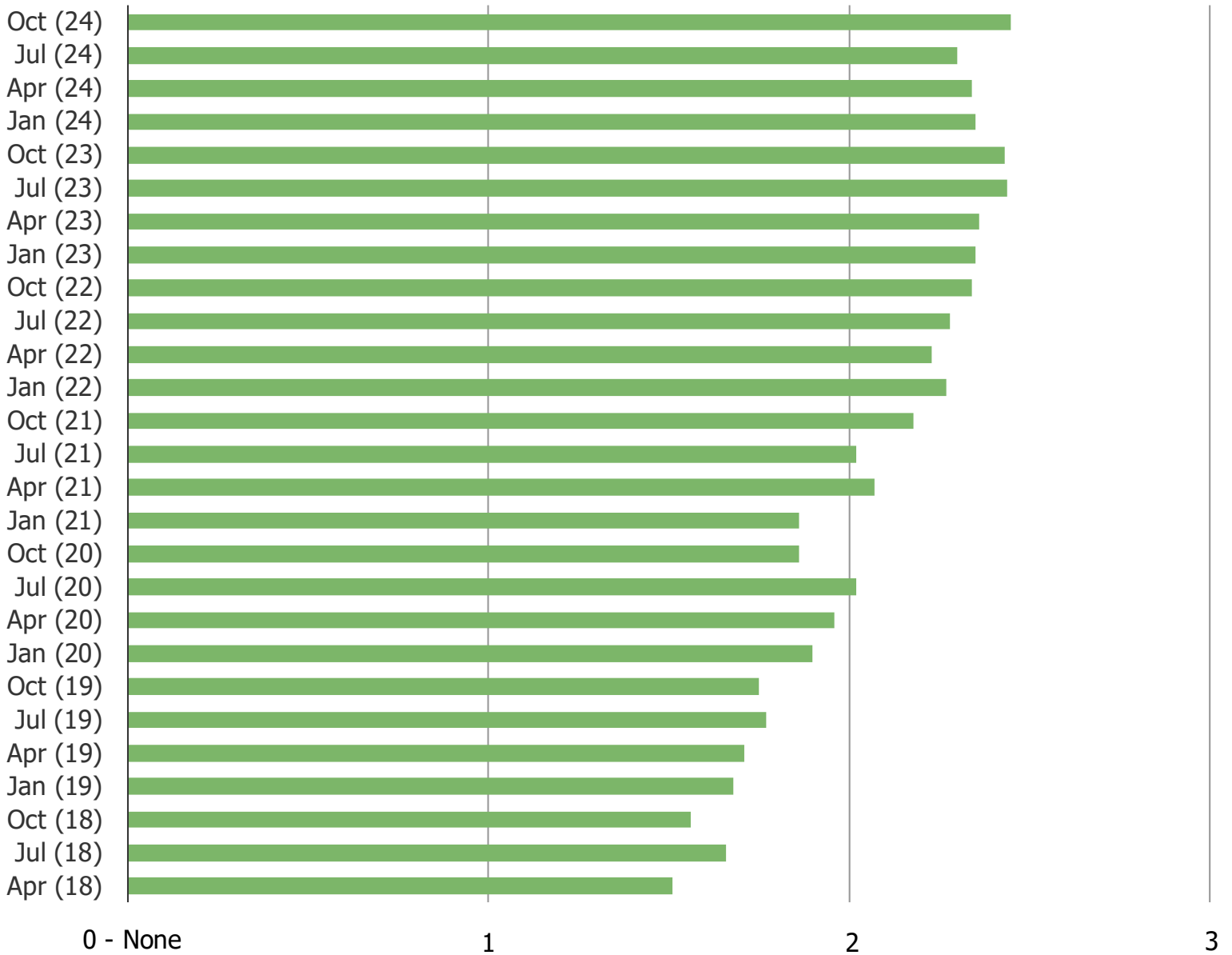
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STREAMING SECTOR DYNAMICS

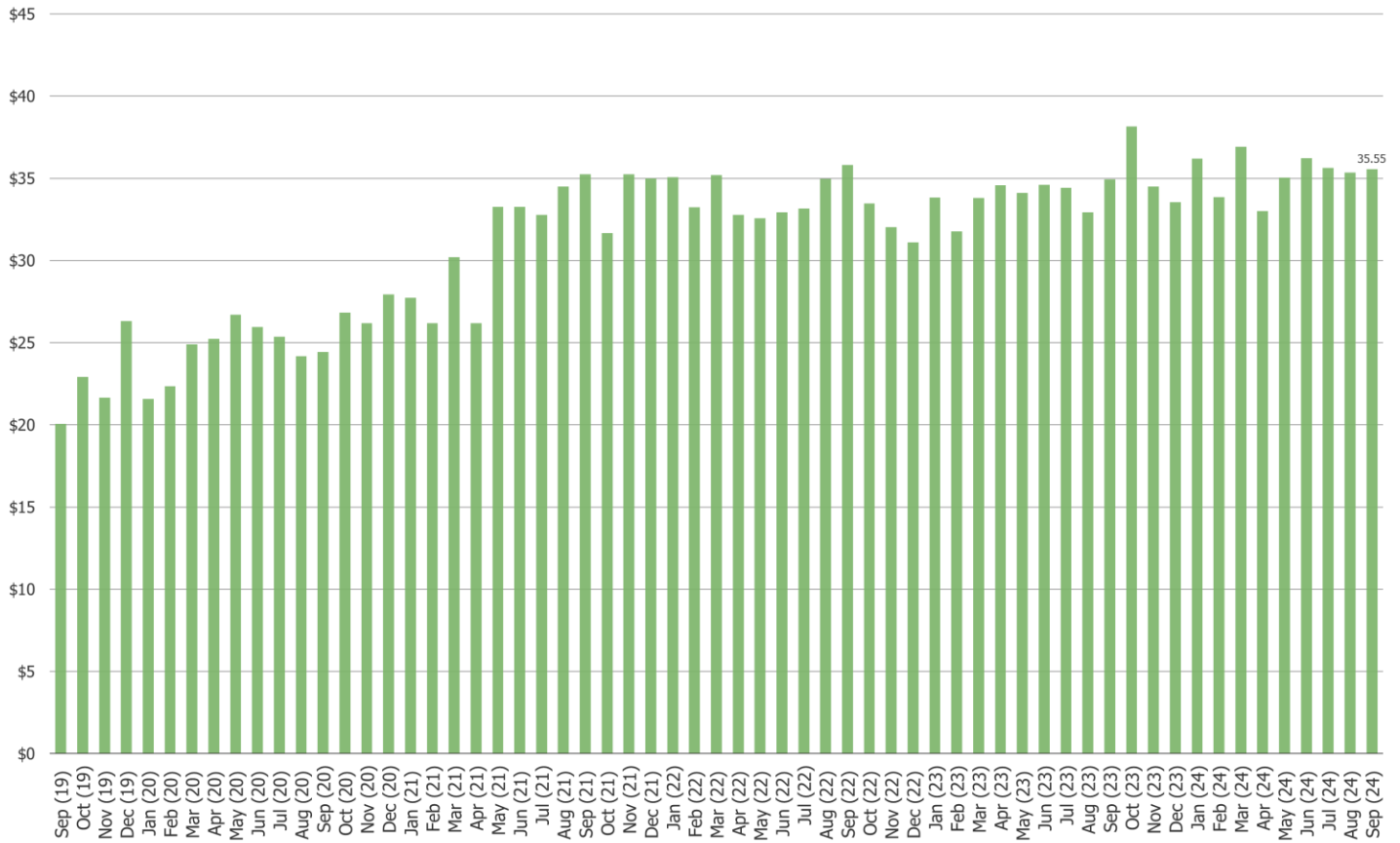
HOW MANY STREAMING VIDEO SERVICES DO YOU THINK IS THE RIGHT NUMBER TO BE PAYING FOR AT THE SAME TIME?

Posed to all respondents.



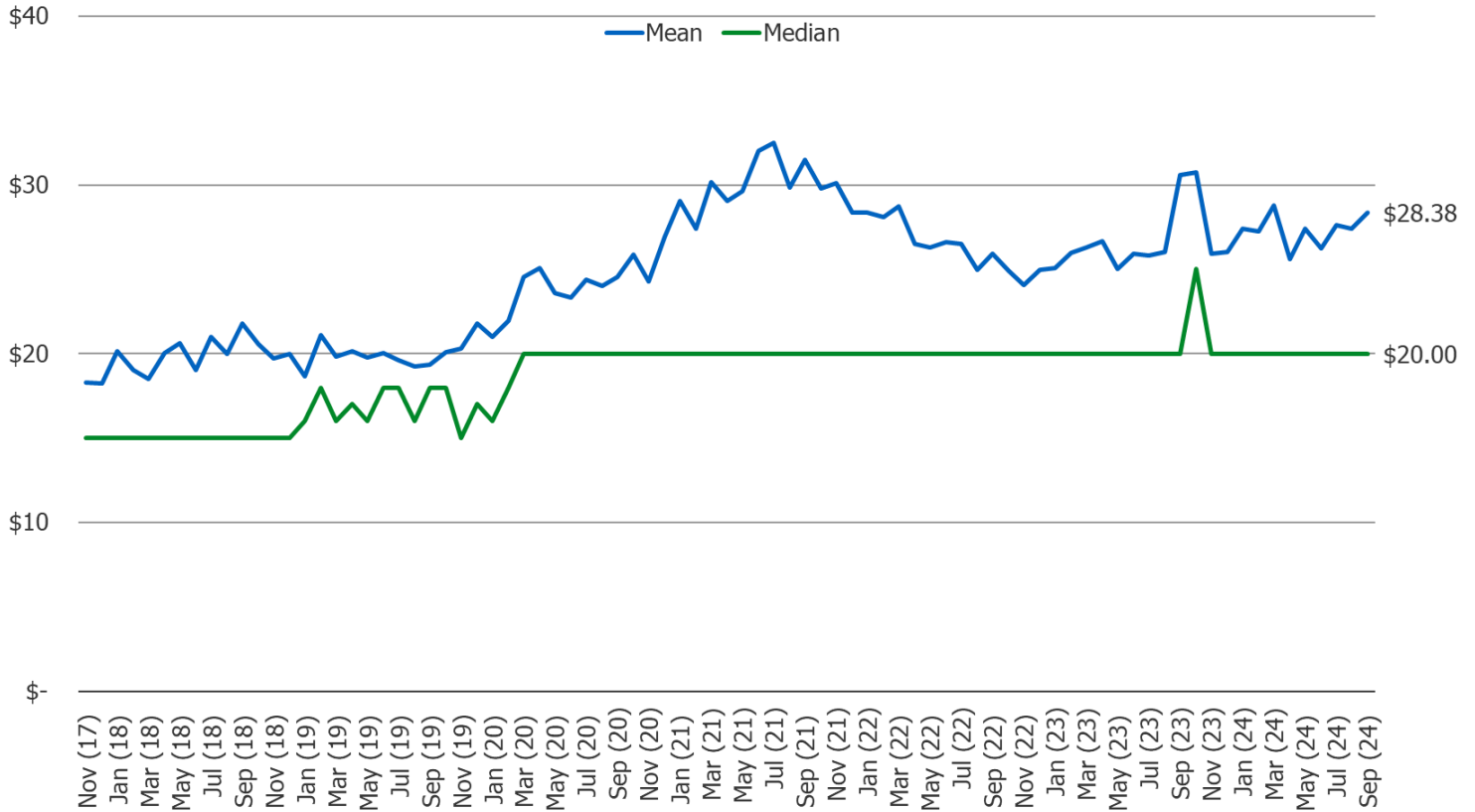
HOW MUCH DO YOU THINK IS APPROPRIATE TO SPEND ON STREAMING VIDEO SERVICES, IN TOTAL, PER MONTH?

Posed to all respondents.



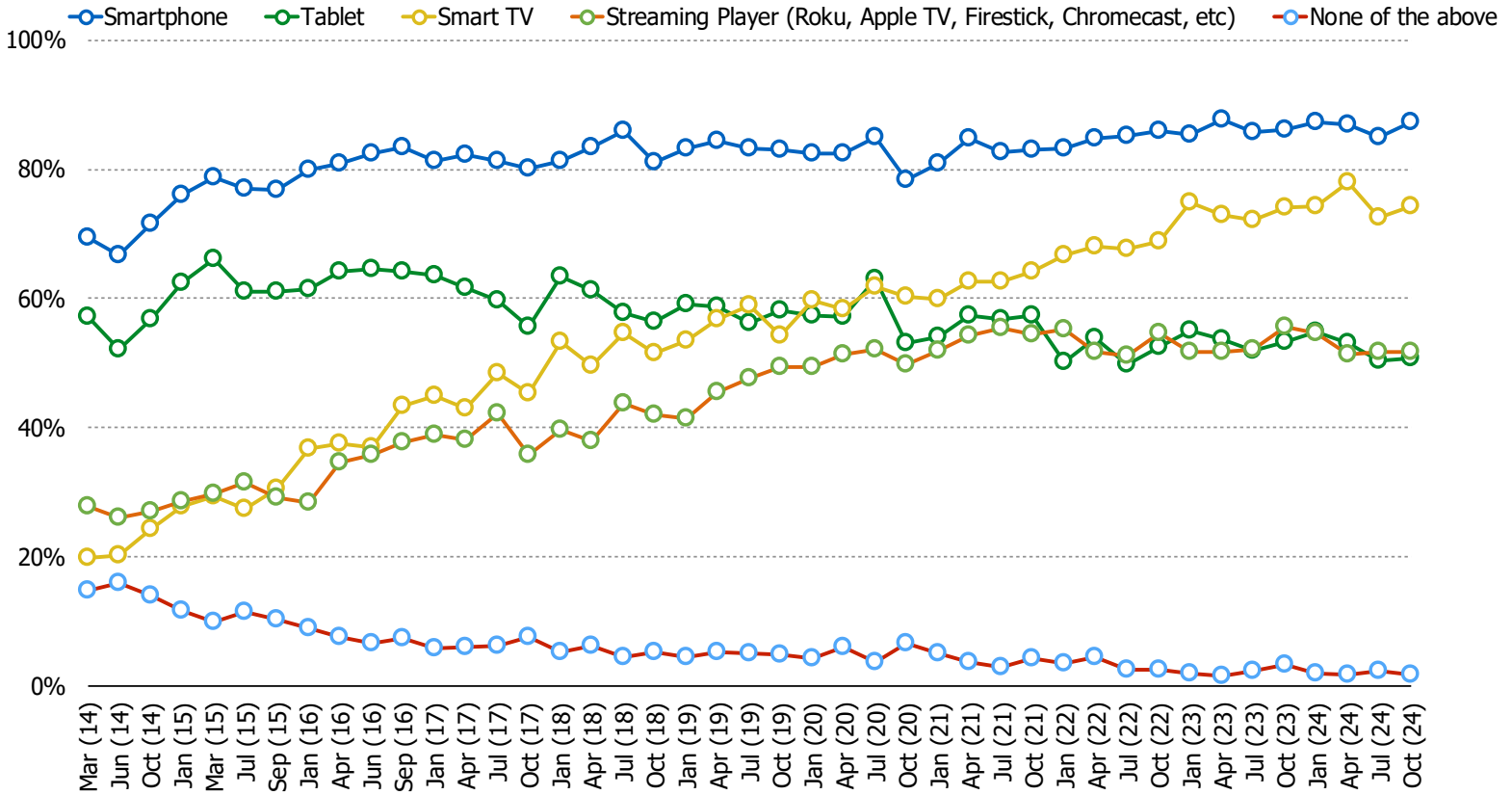
AT WHAT MONTHLY PRICE POINT WOULD YOU DECIDE TO CANCEL YOUR NETFLIX SUBSCRIPTION?
 (IE, IF NETFLIX CONTINUES TO RAISE PRICES, WHAT PRICE POINT PER MONTH WOULD TRIGGER YOUR
 CANCELLATION OF NETFLIX)?

Posed to all respondents.



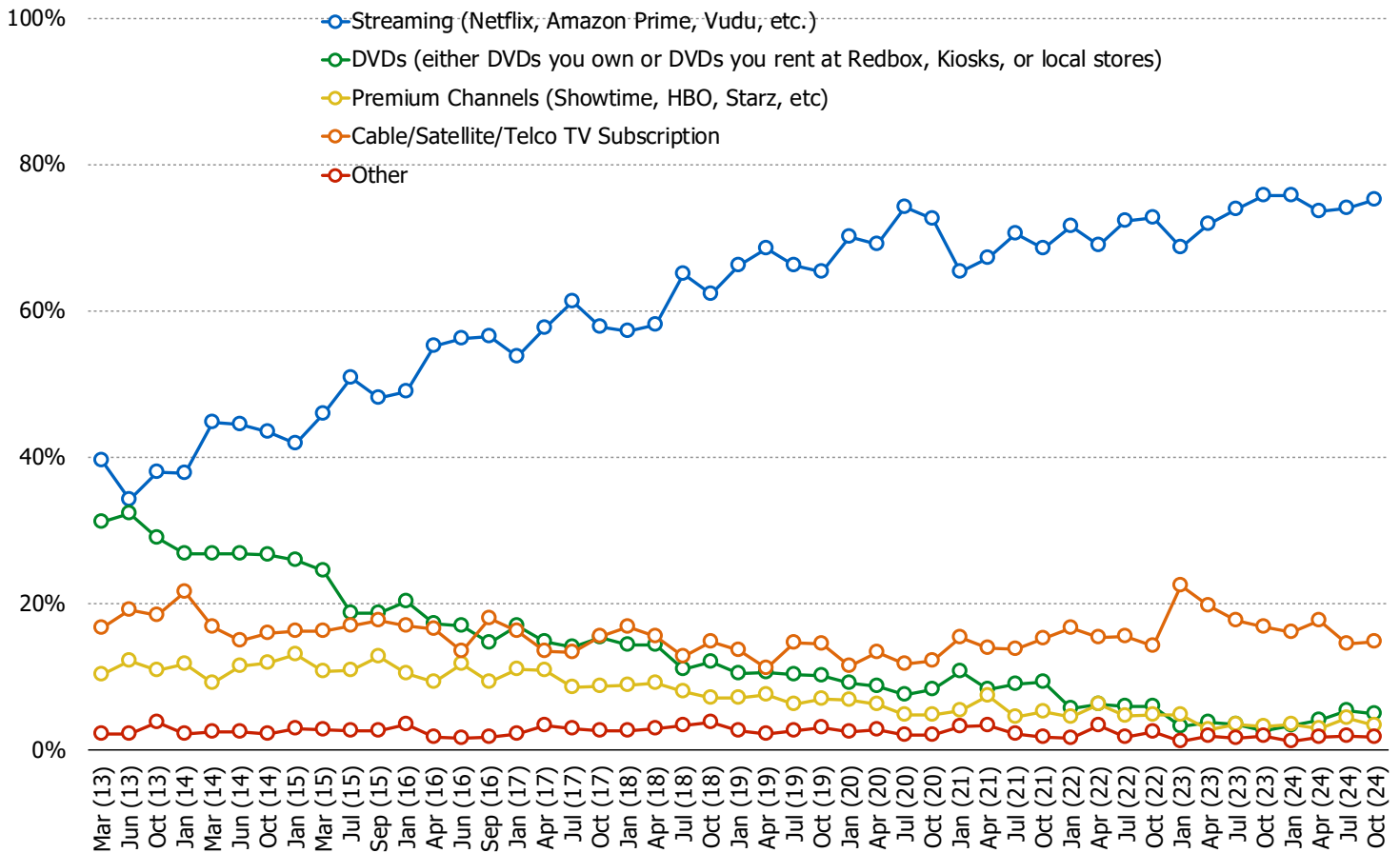
INTERNET CONNECTED DEVICES OWNED BY RESPONDENTS

This question was posed to the target audience.



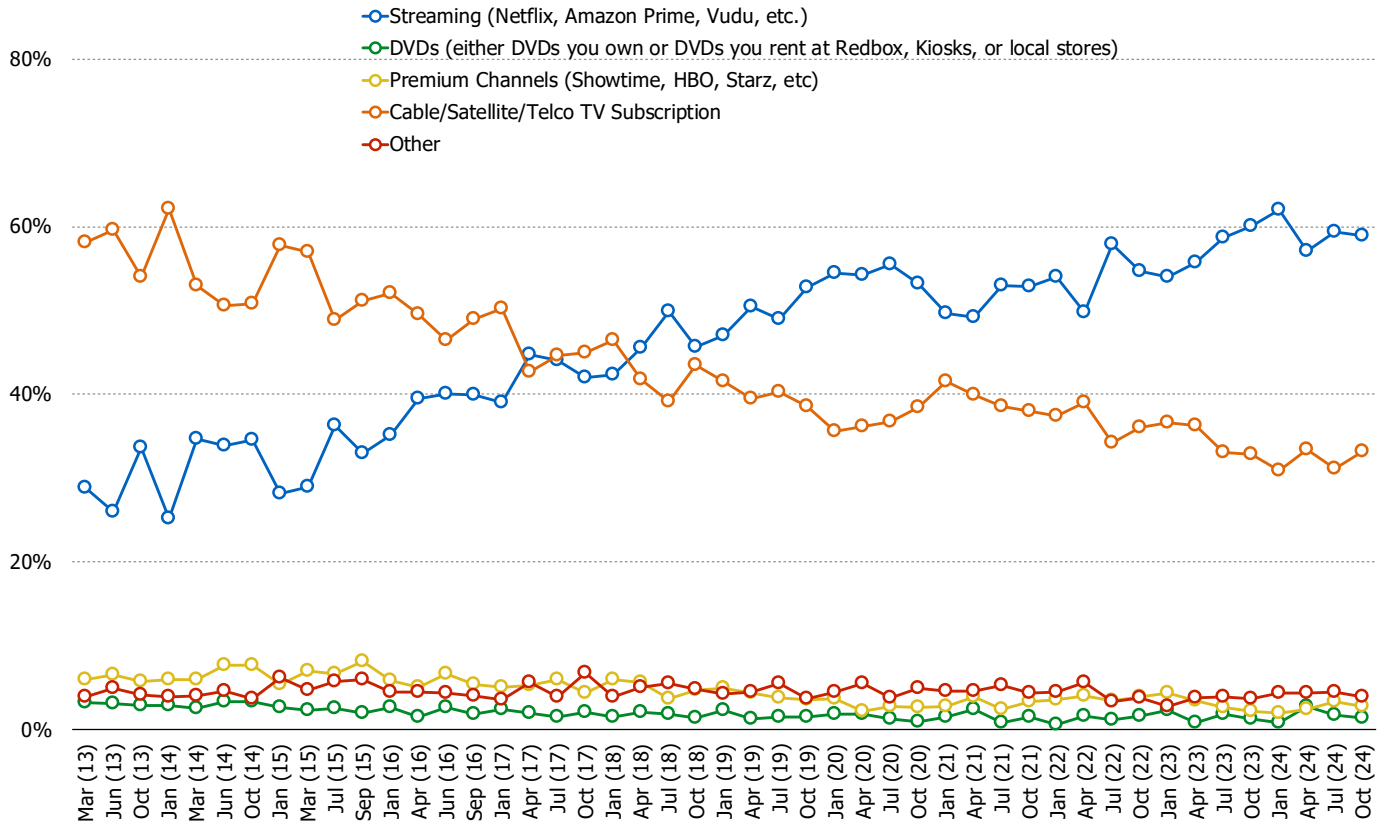
PREFERRED METHOD FOR WATCHING MOVIES

This question was posed to the target audience.



PREFERRED METHOD FOR WATCHING TELEVISION SHOWS

This question was posed to the target audience.

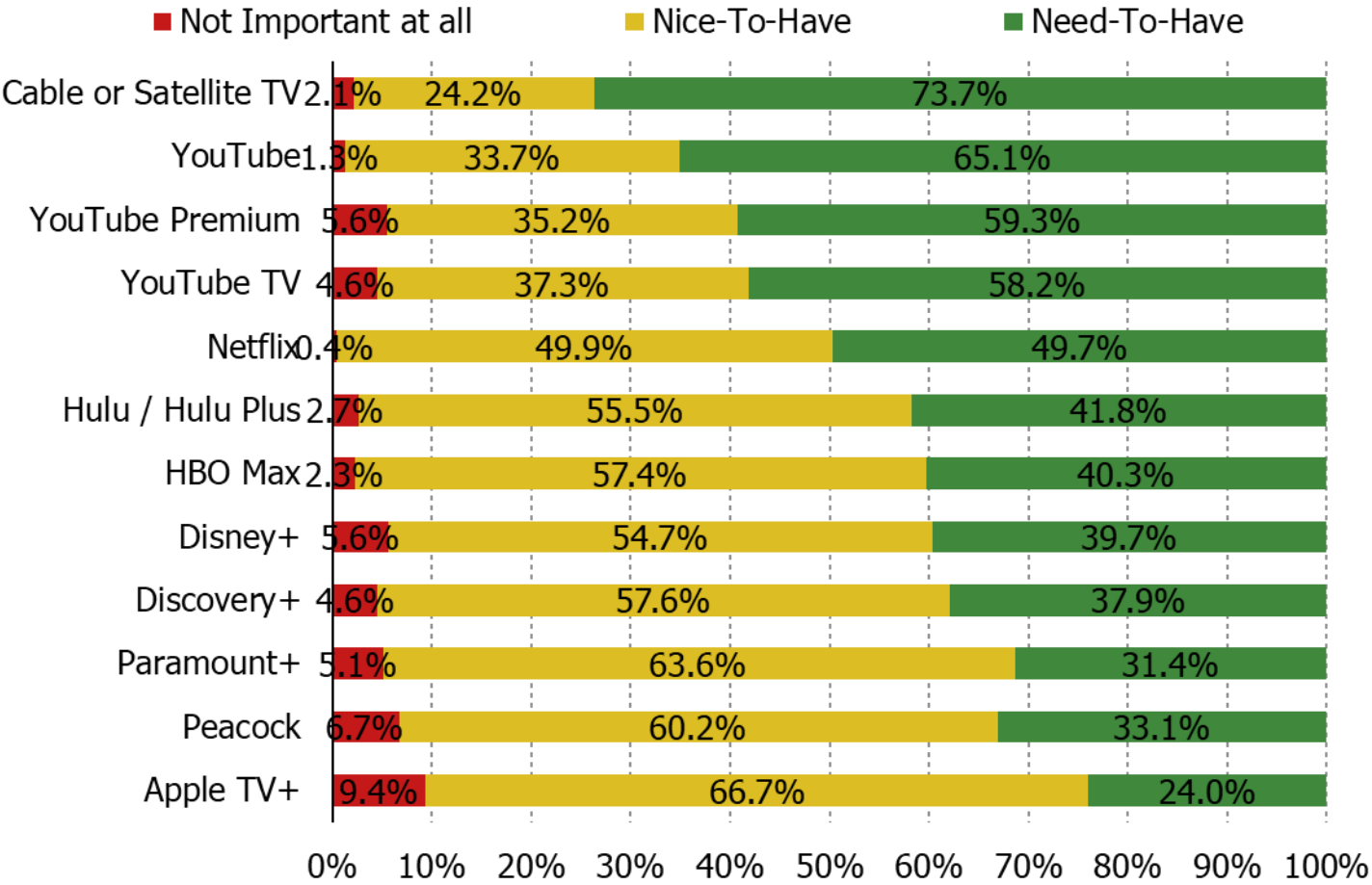


STREAMING PLATFORMS – COMPETITIVE DYNAMICS

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.

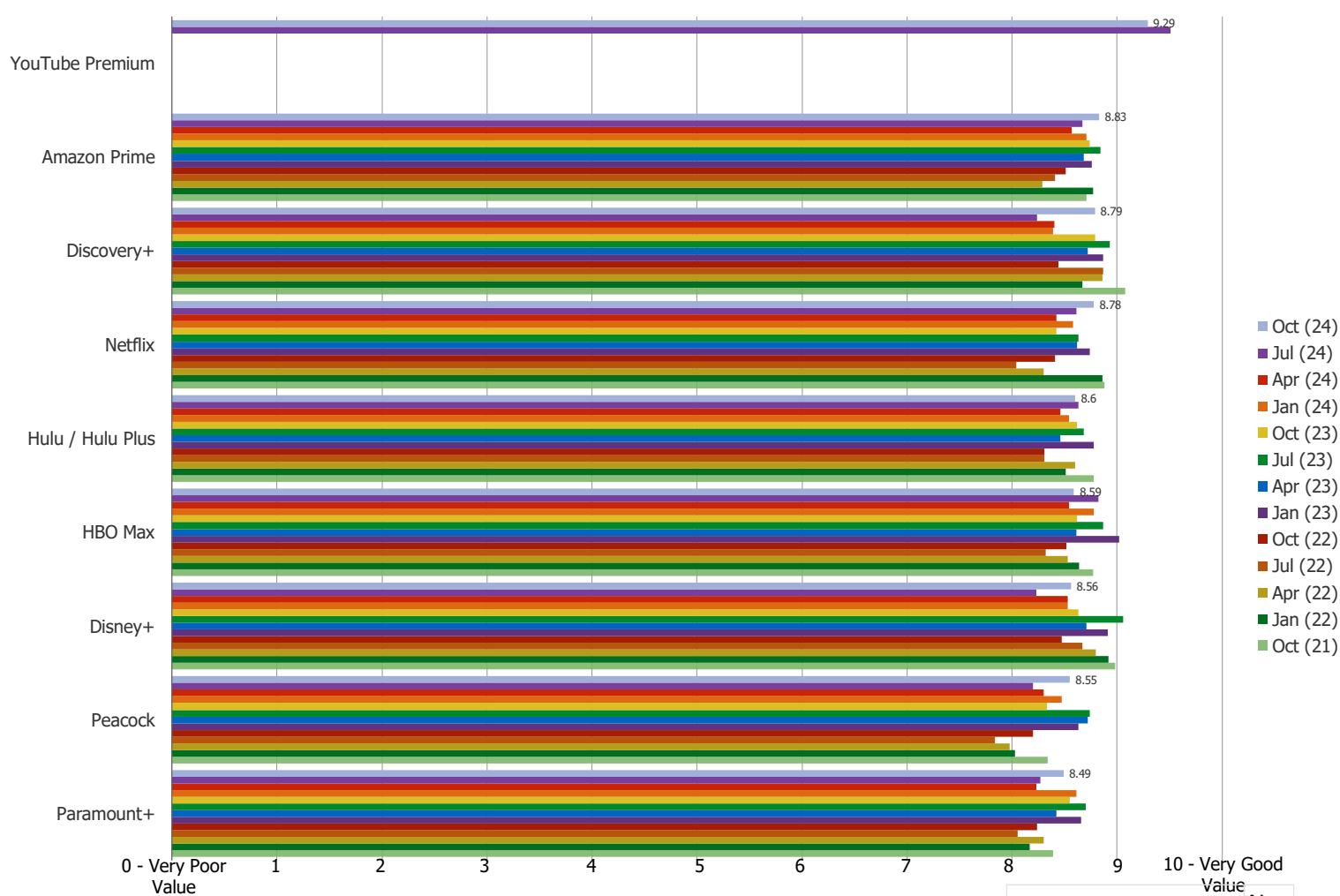
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	N=
Apple TV+	96
Peacock	284
Paramount+	236
Discovery+	66
Disney+	267
HBO Max	258
Hulu / Hulu Plus	335
Netflix	515
YouTube TV	110
YouTube Premium	54
YouTube	318
Cable or Satellite TV	285

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

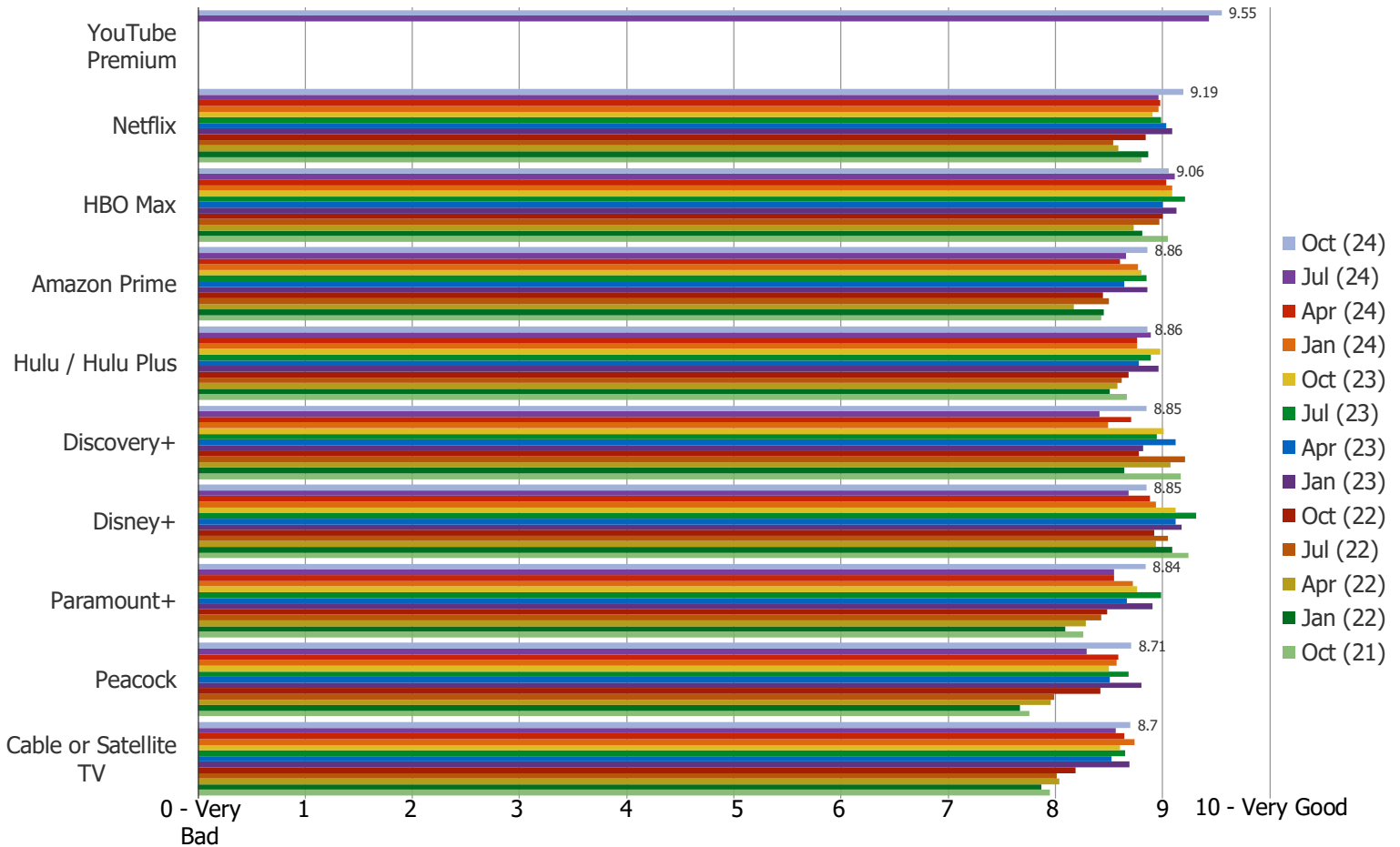
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



	N=
Netflix	490
Disney+	253
Hulu / Hulu Plus	321
HBO Max	243
Amazon Prime	456
Apple TV+	91
Cable or Satellite TV	282
YouTube Premium	50
Peacock	273
Discovery+	65
Paramount+	223

PLEASE RATE THE CONTENT AVAILABLE ON THE FOLLOWING:

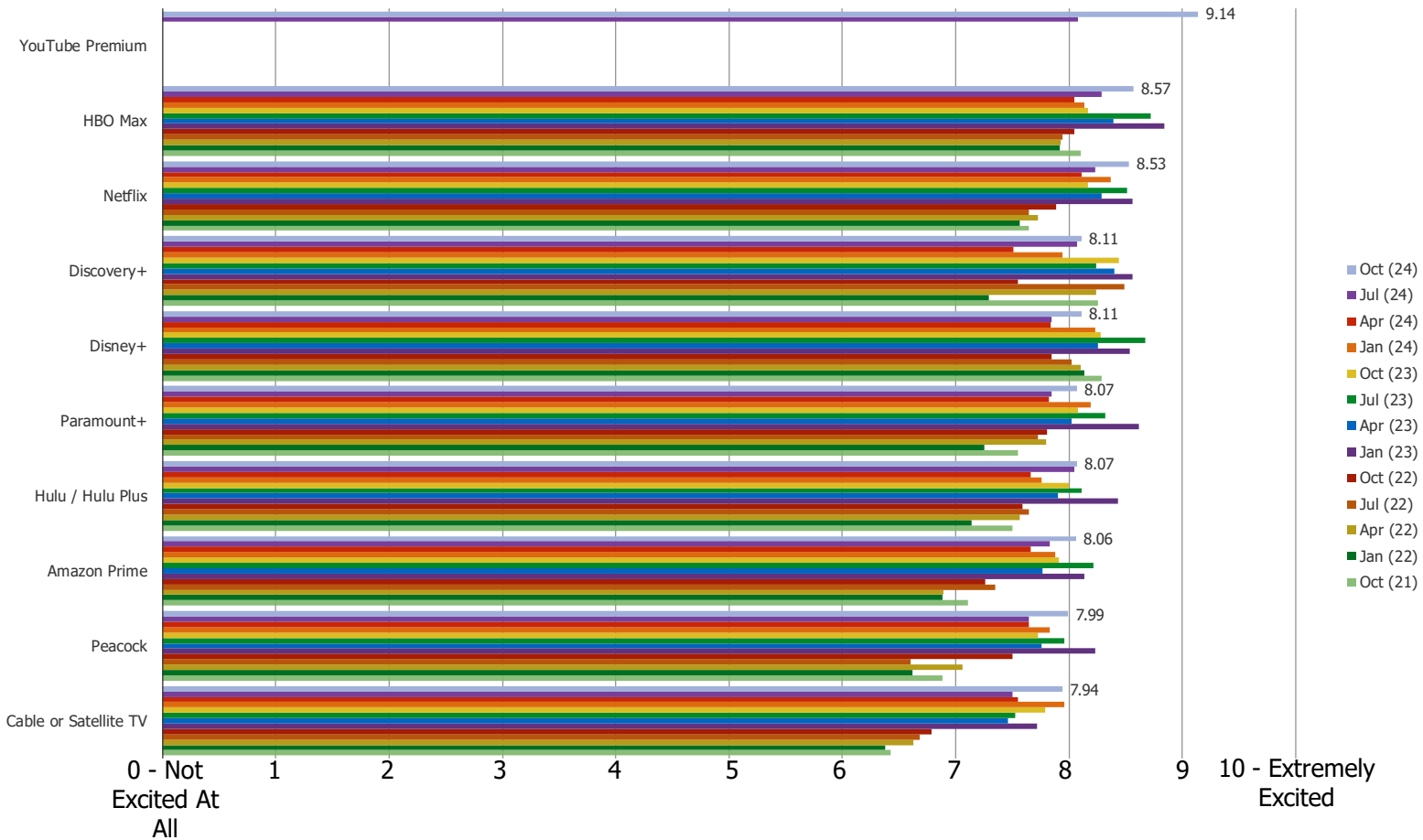
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Discovery+	65
Paramount+	223

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.



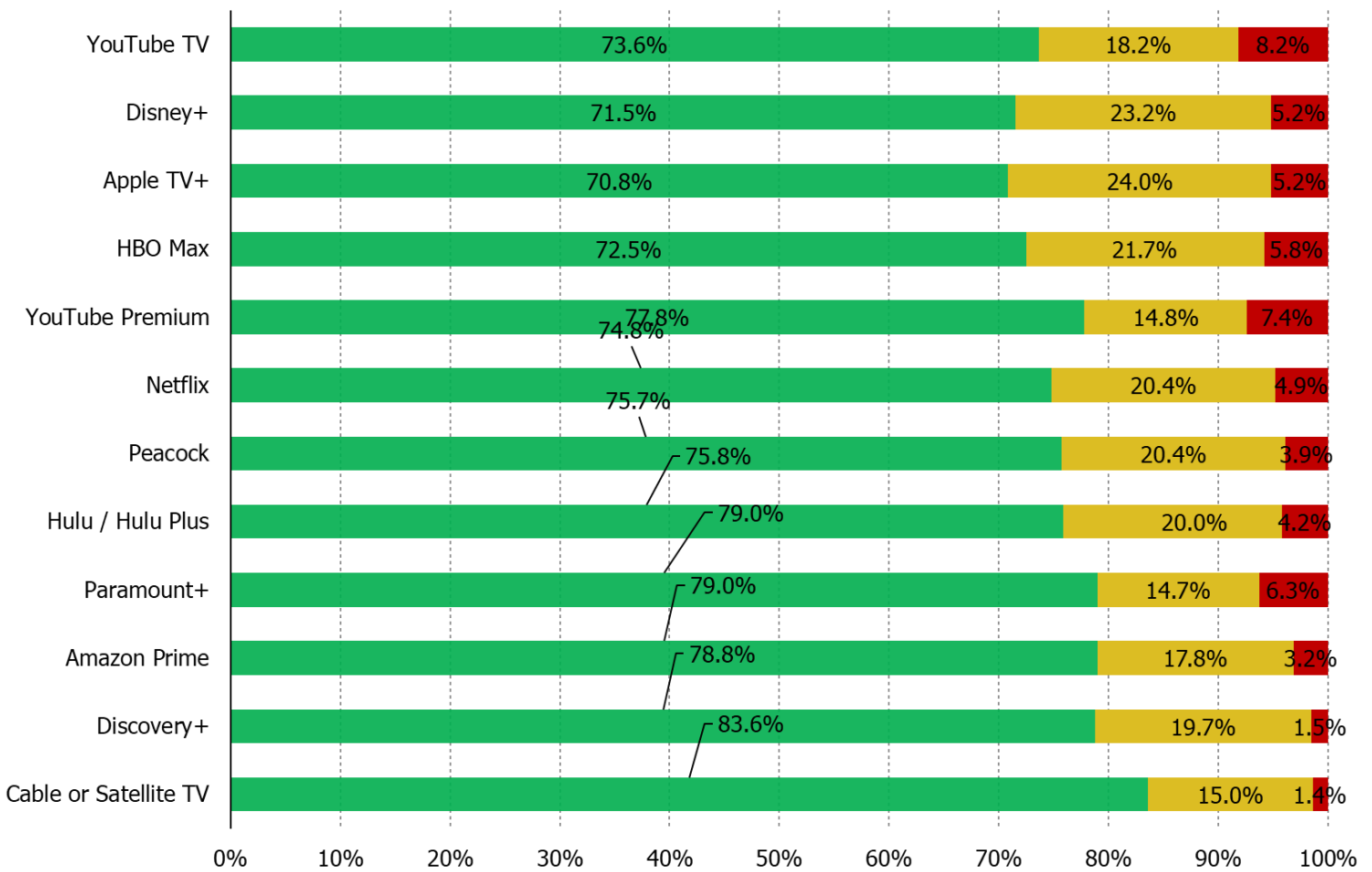
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YouTube Premium	50
Peacock	273
Discovery+	65
Paramount+	223

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.

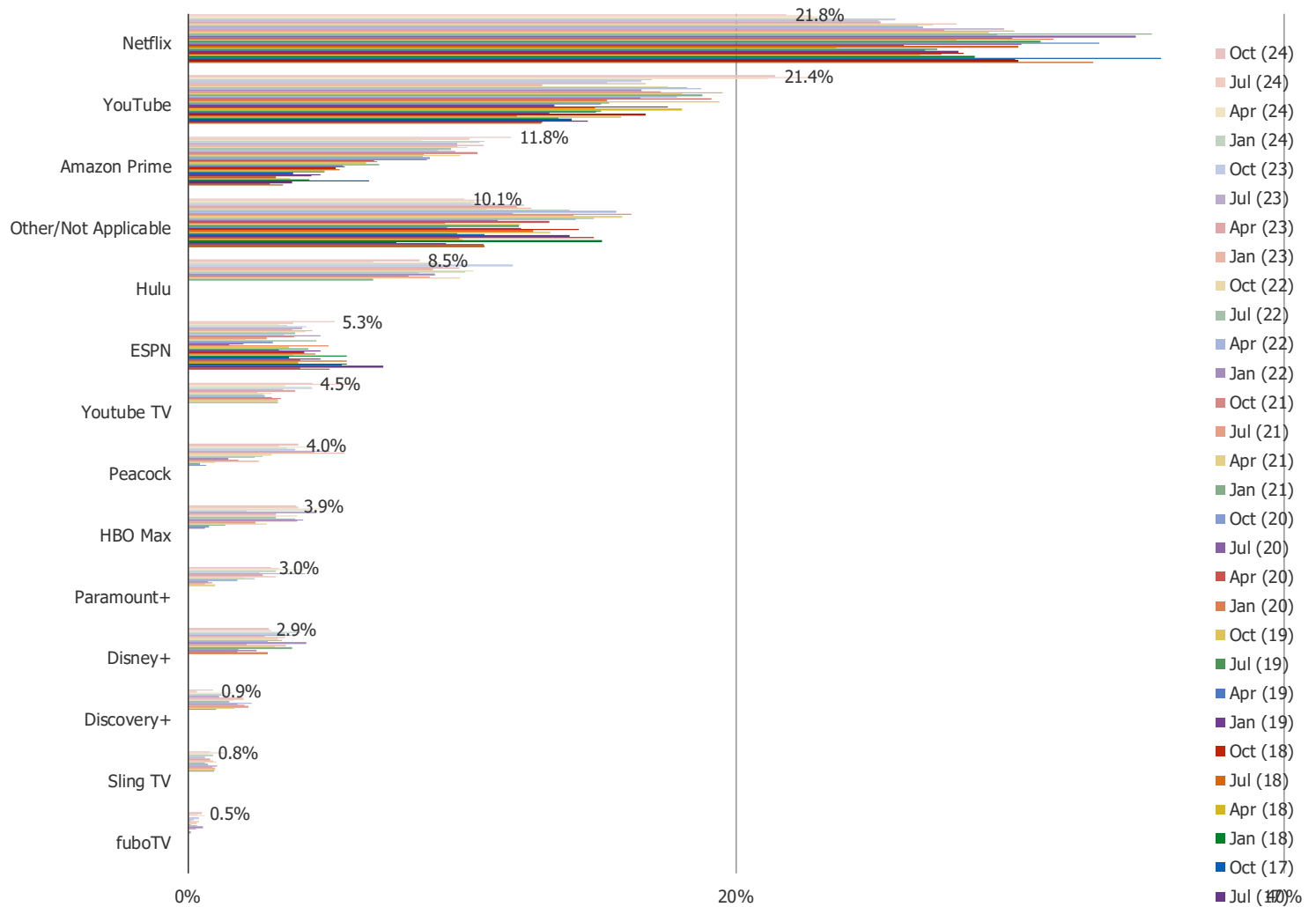
OCTOBER 2024

- 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?

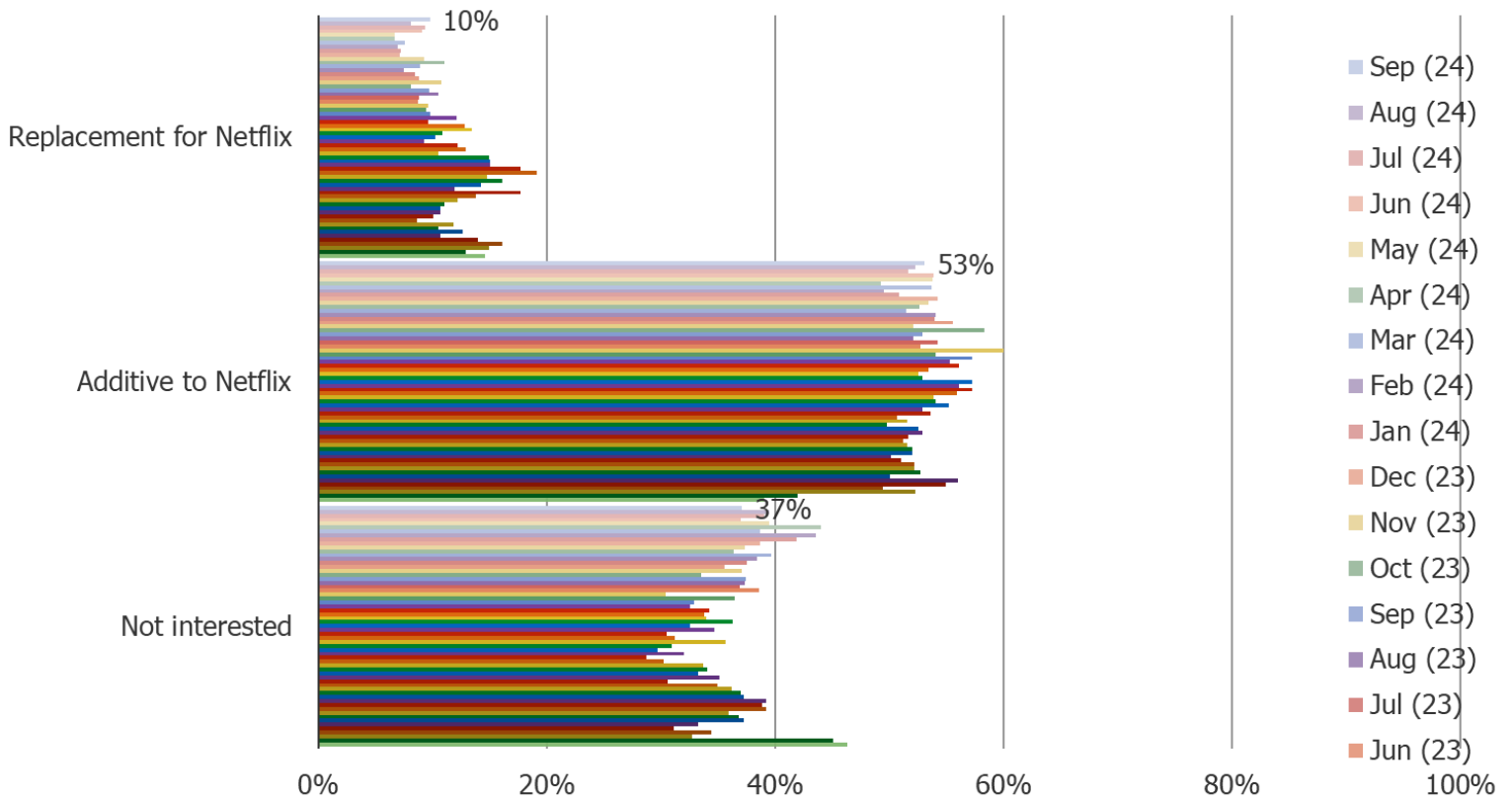
Posed to all respondents



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

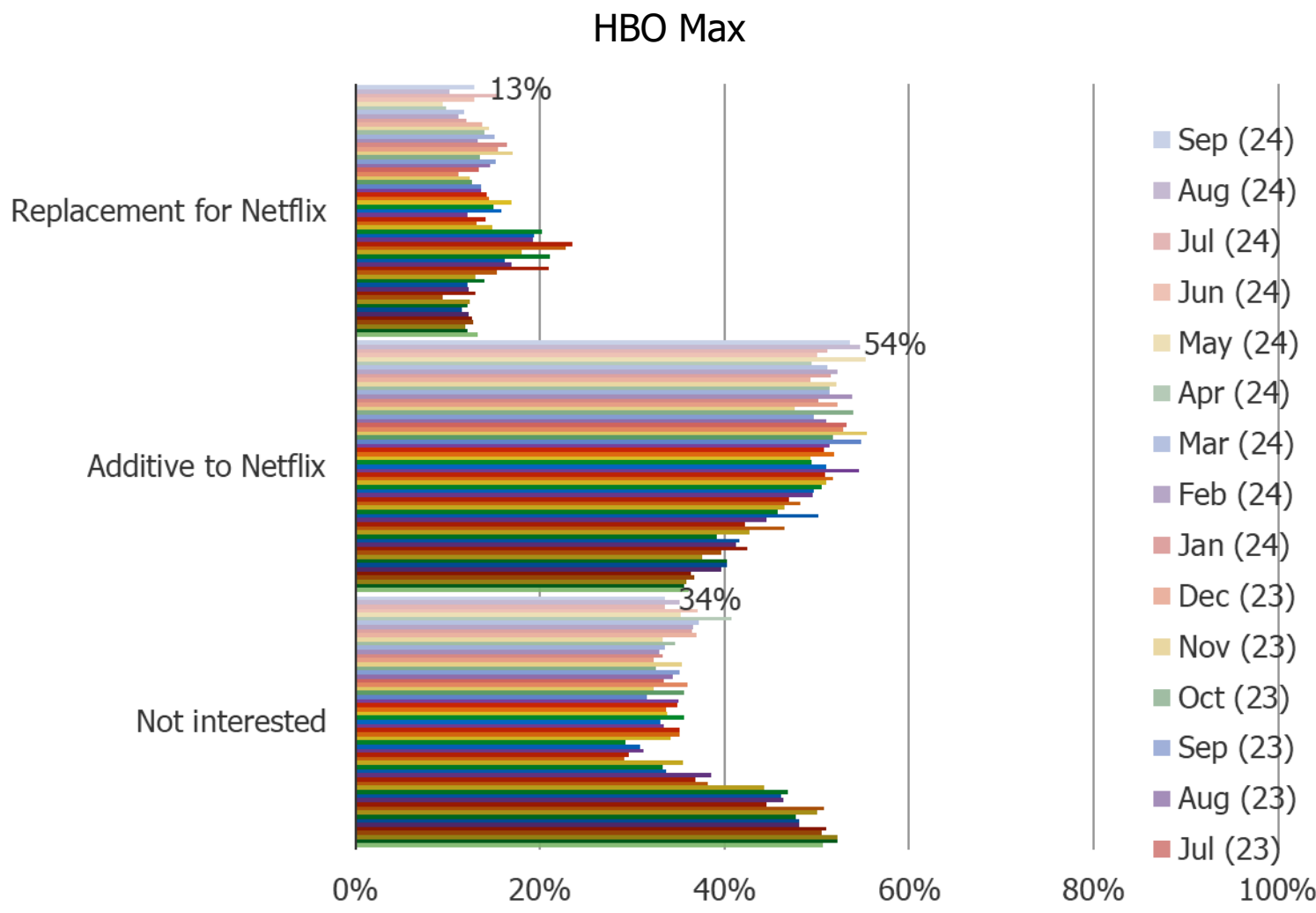
Posed to Netflix subscribers.

Disney+



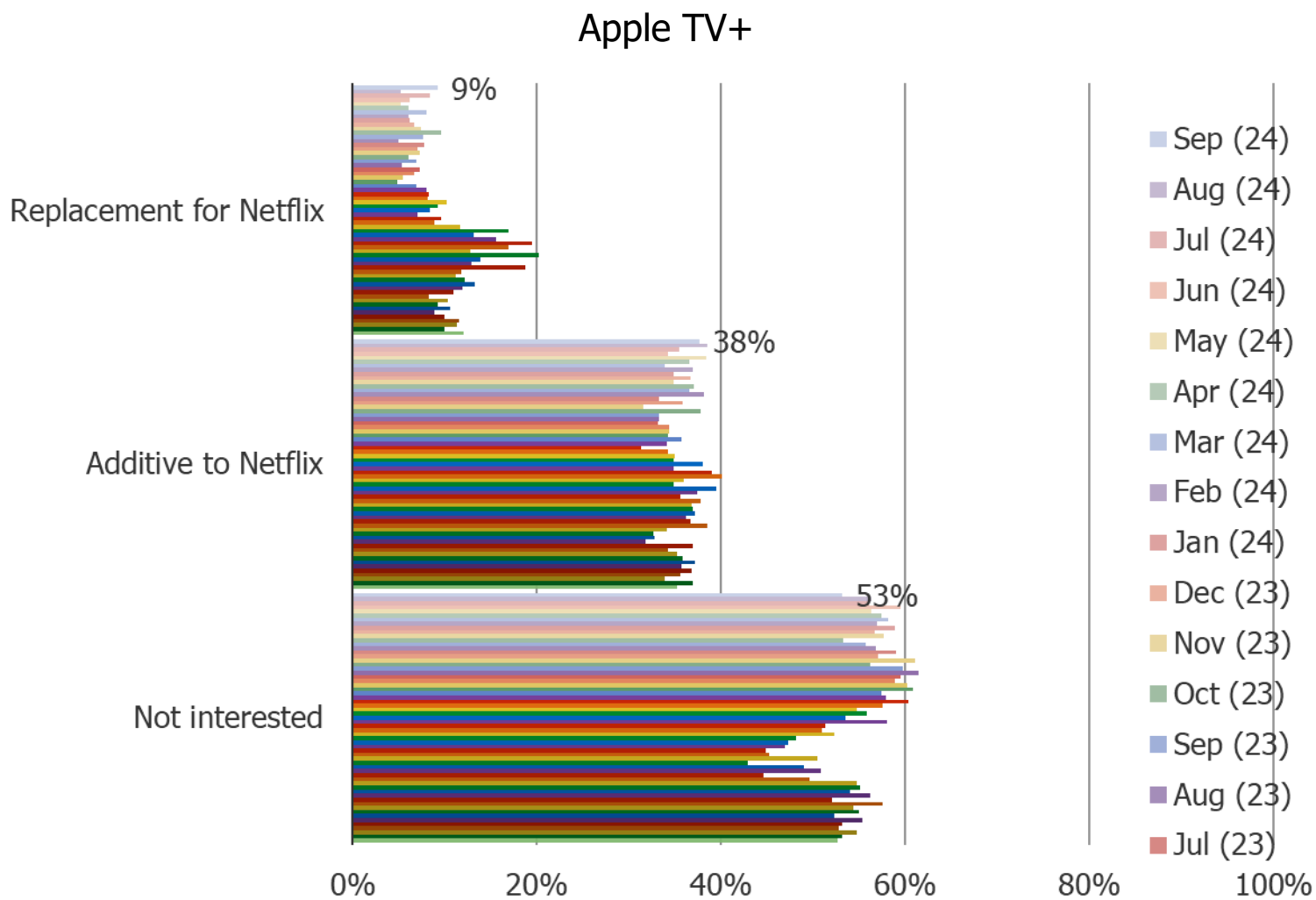
WOULD YOU VIEW THE FOLLOWING TO BE ADDITIVE OR A REPLACEMENT OF NETFLIX?

Posed to Netflix subscribers.



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

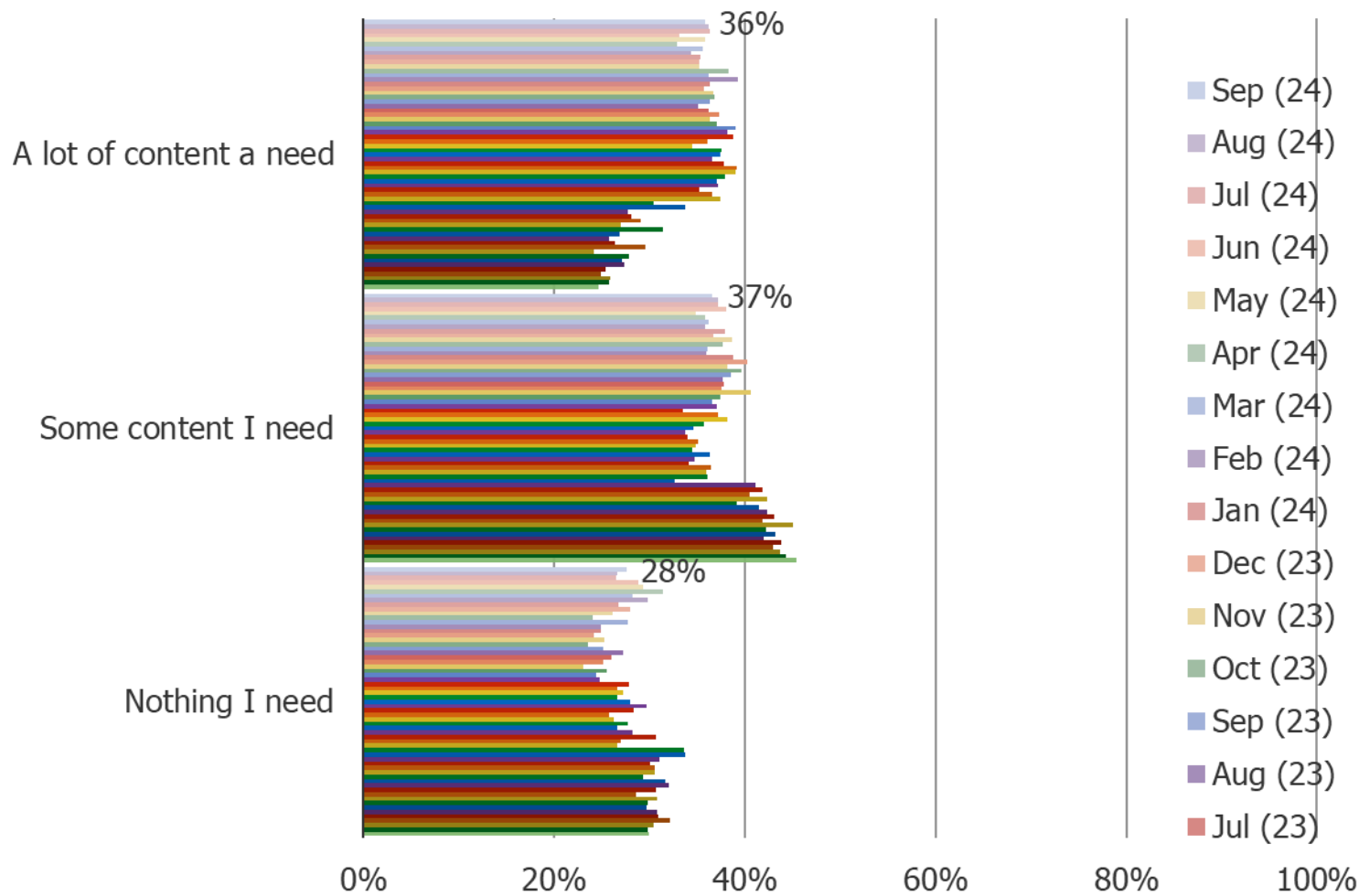
Posed to Netflix subscribers.



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

Posed to all respondents.

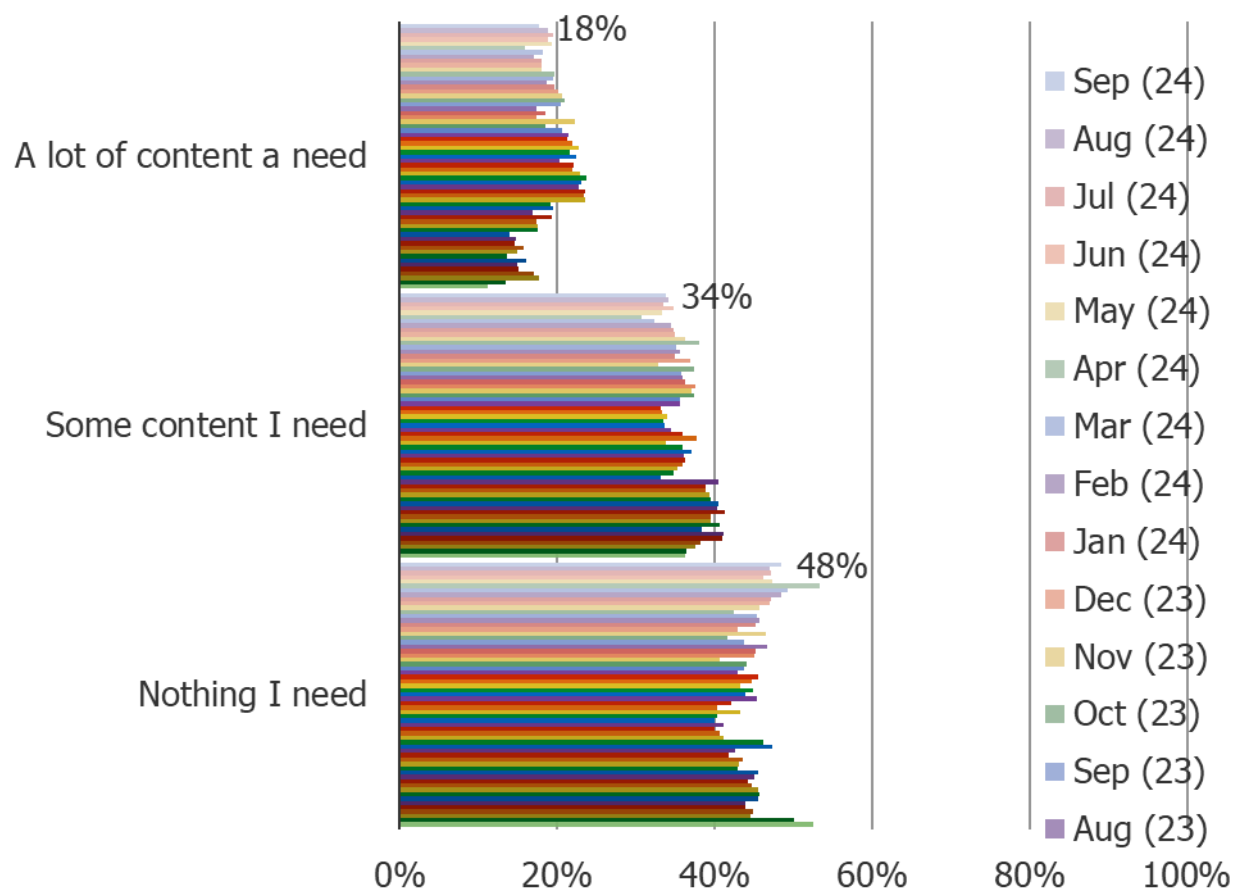
Netflix



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

Posed to all respondents.

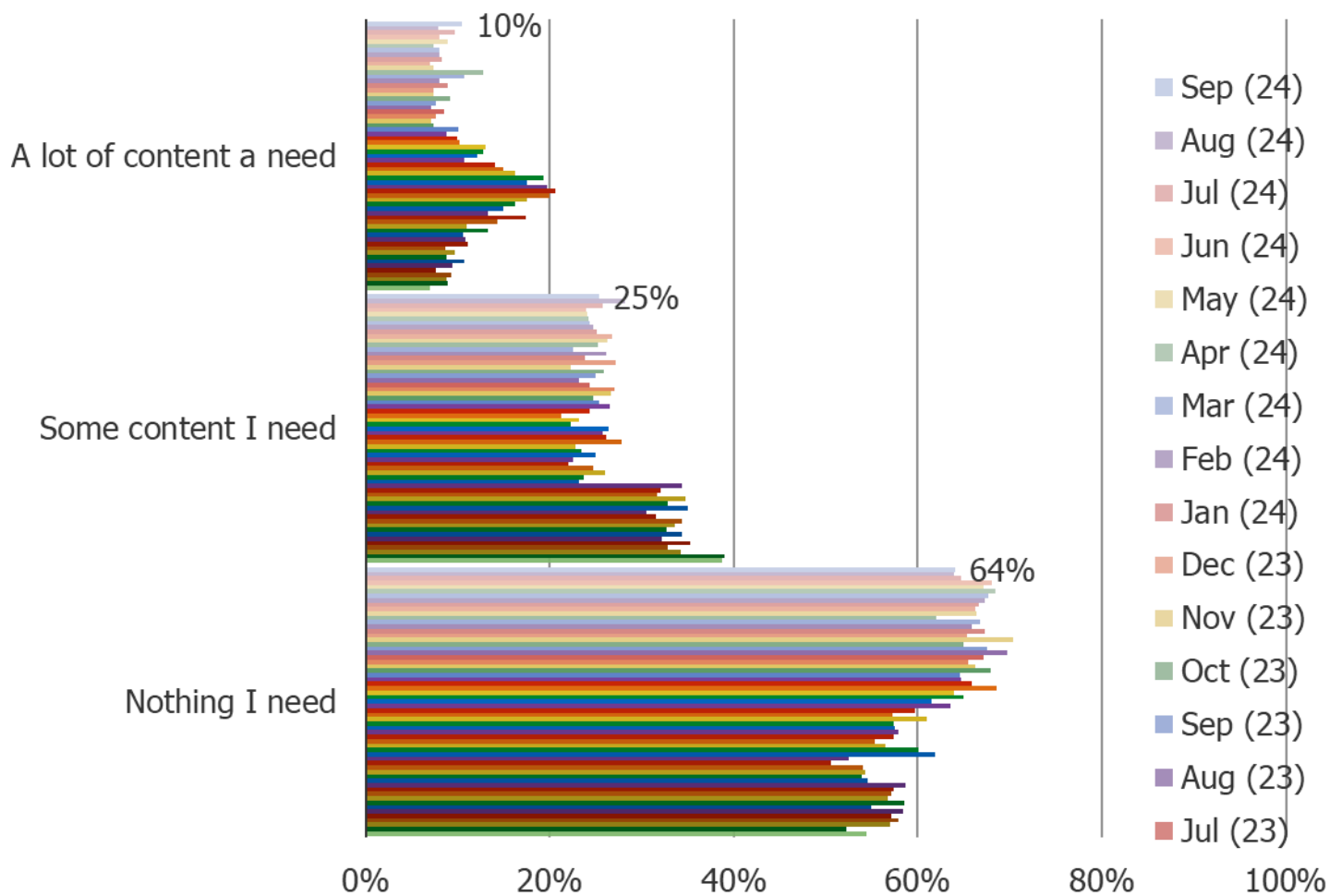
Disney+



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

Posed to all respondents.

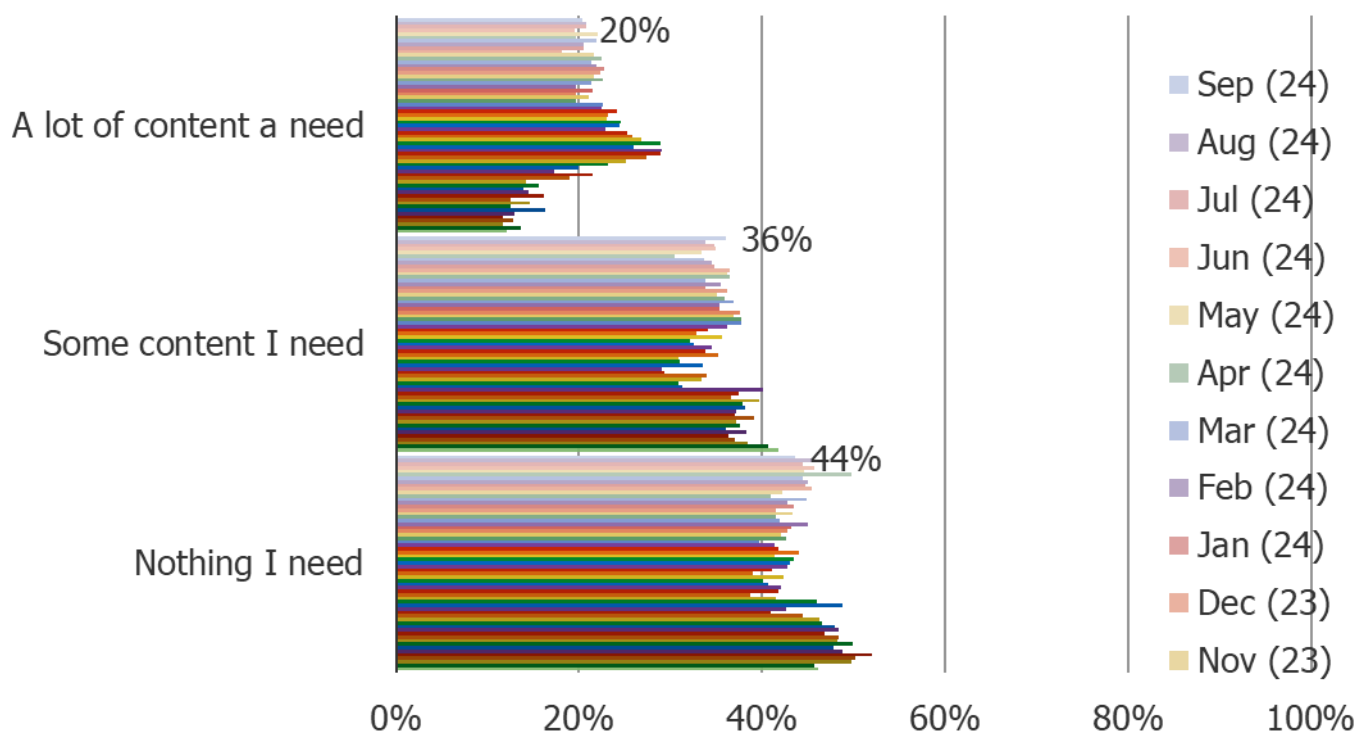
Apple TV+



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

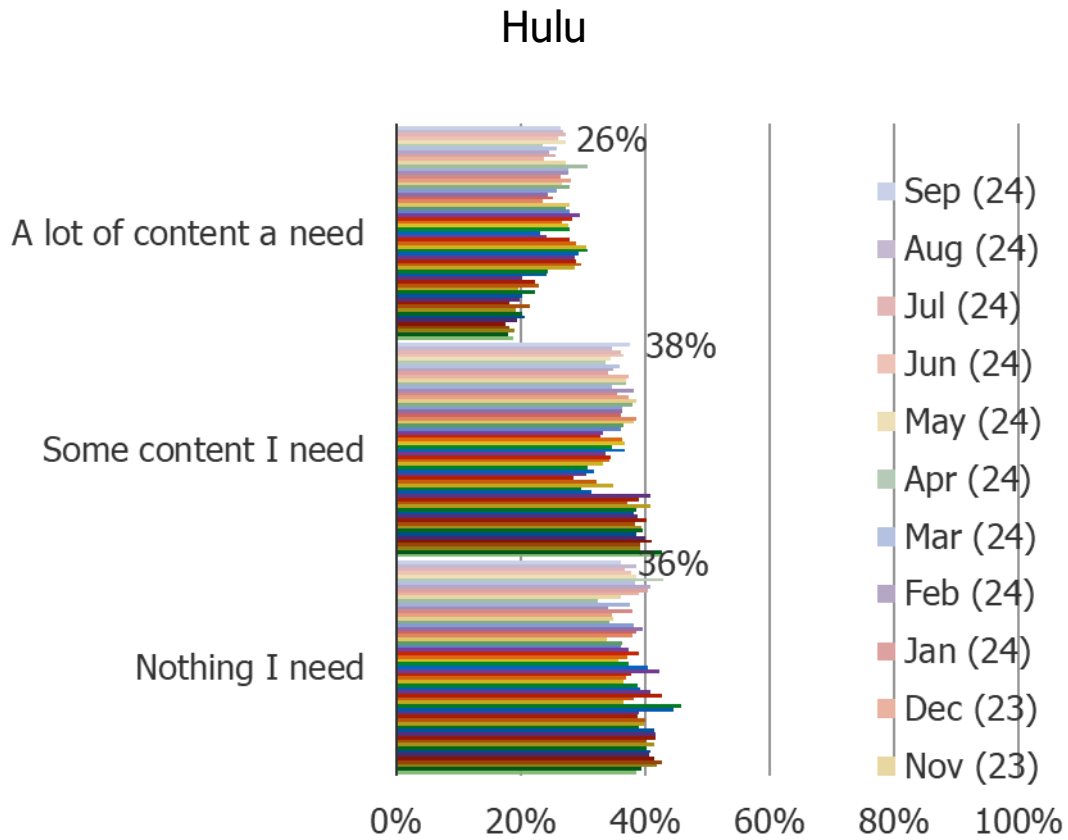
Posed to all respondents.

HBO Max



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

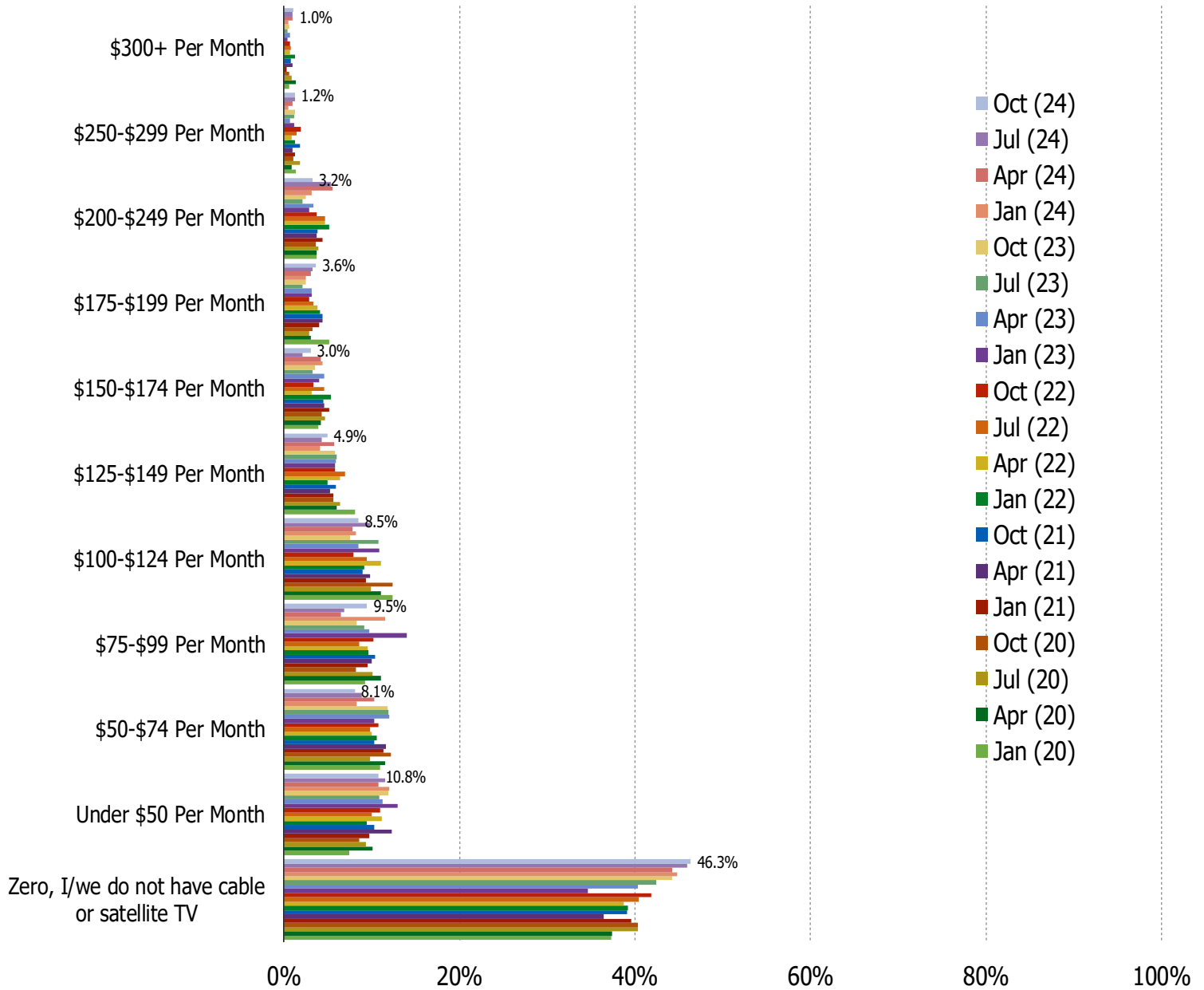
Posed to all respondents.



SPEND ON CONTENT

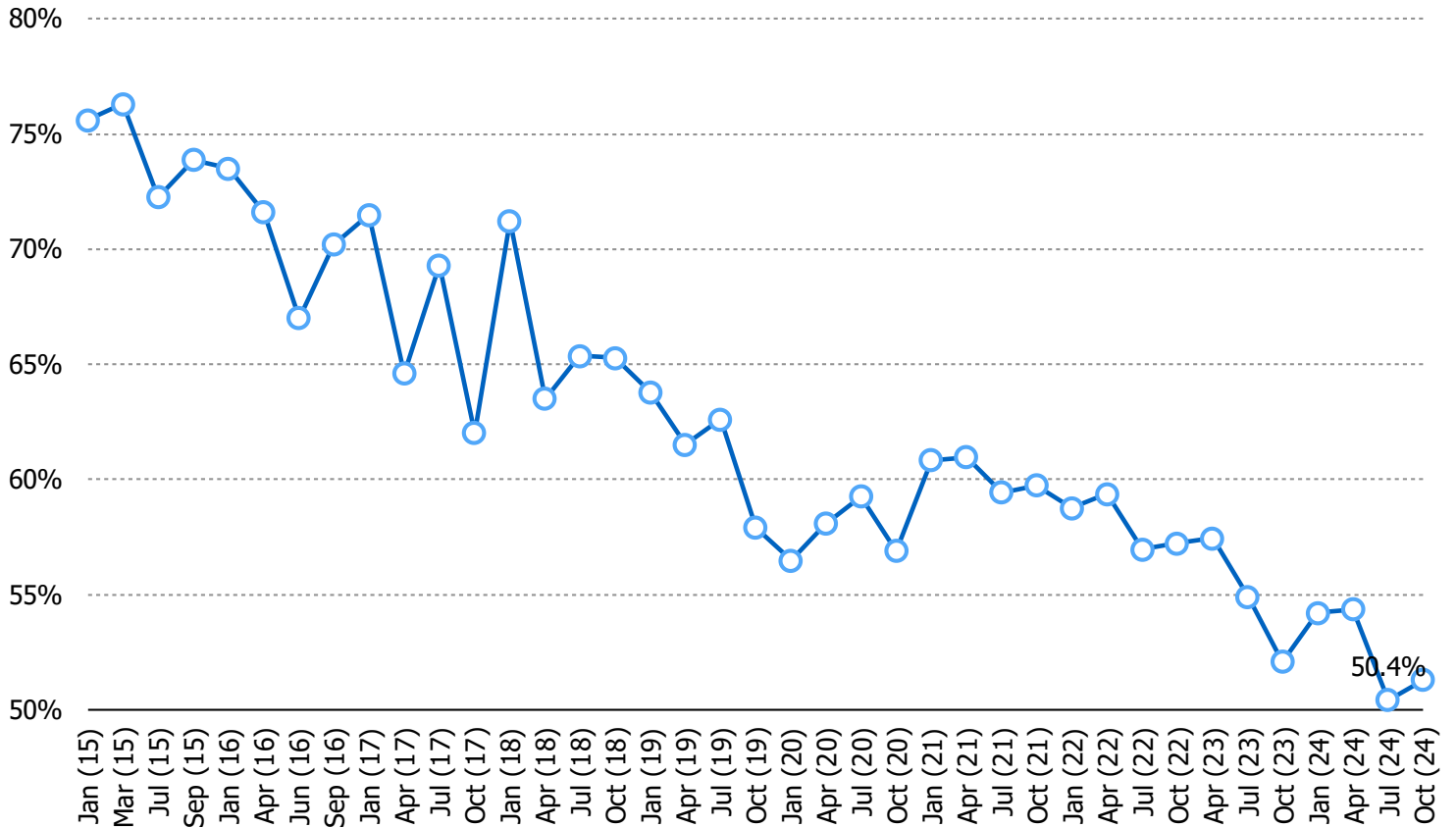
APPROXIMATELY HOW MUCH DO YOU SPEND ON CABLE/SATELLITE TV SERVICES PER MONTH?

Posed to respondents who watch video content at home.



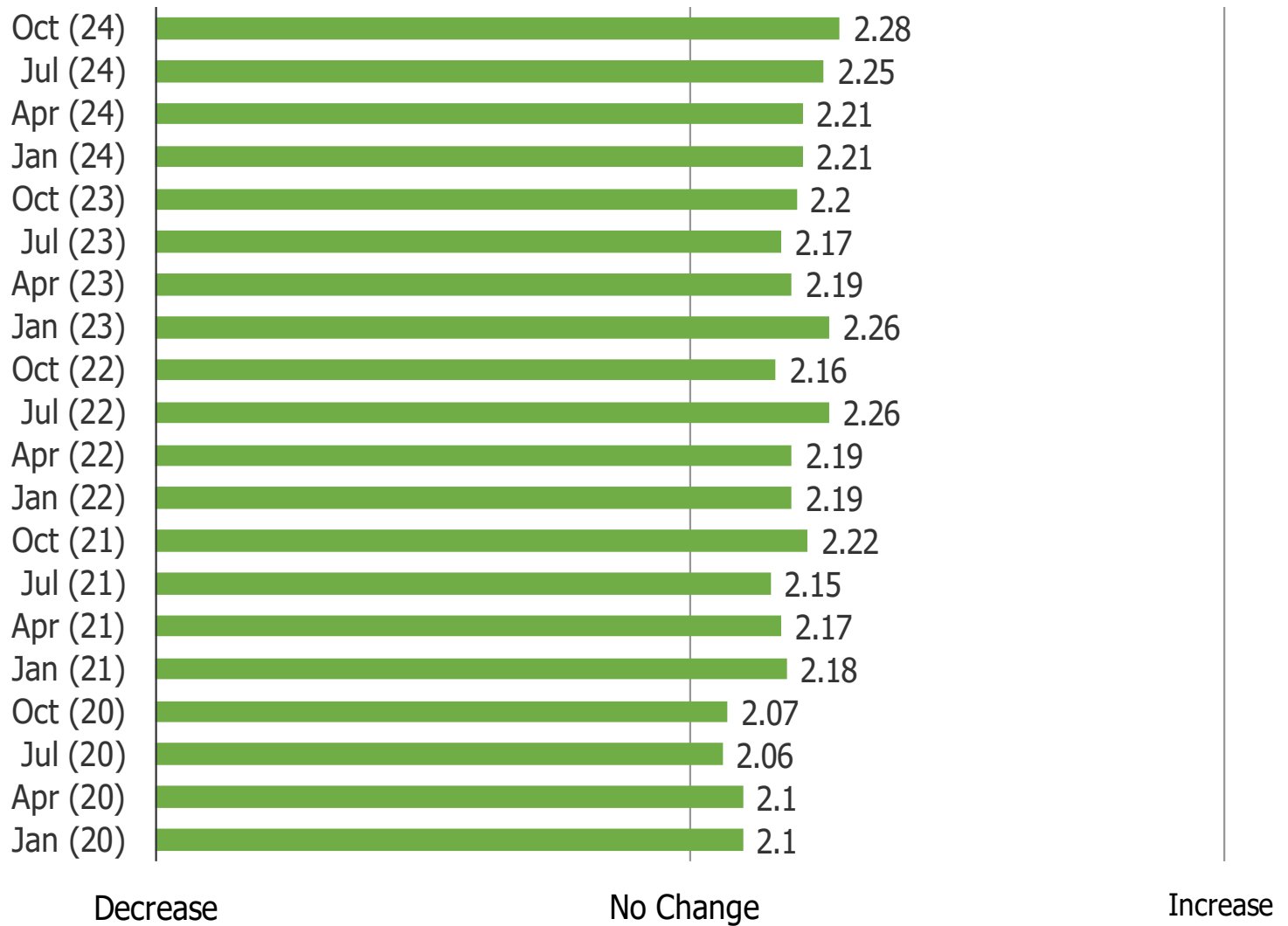
DO YOU CURRENTLY SUBSCRIBE TO CABLE, SATELLITE, OR TELCO TV?

Posed to respondents who watch video content at home.



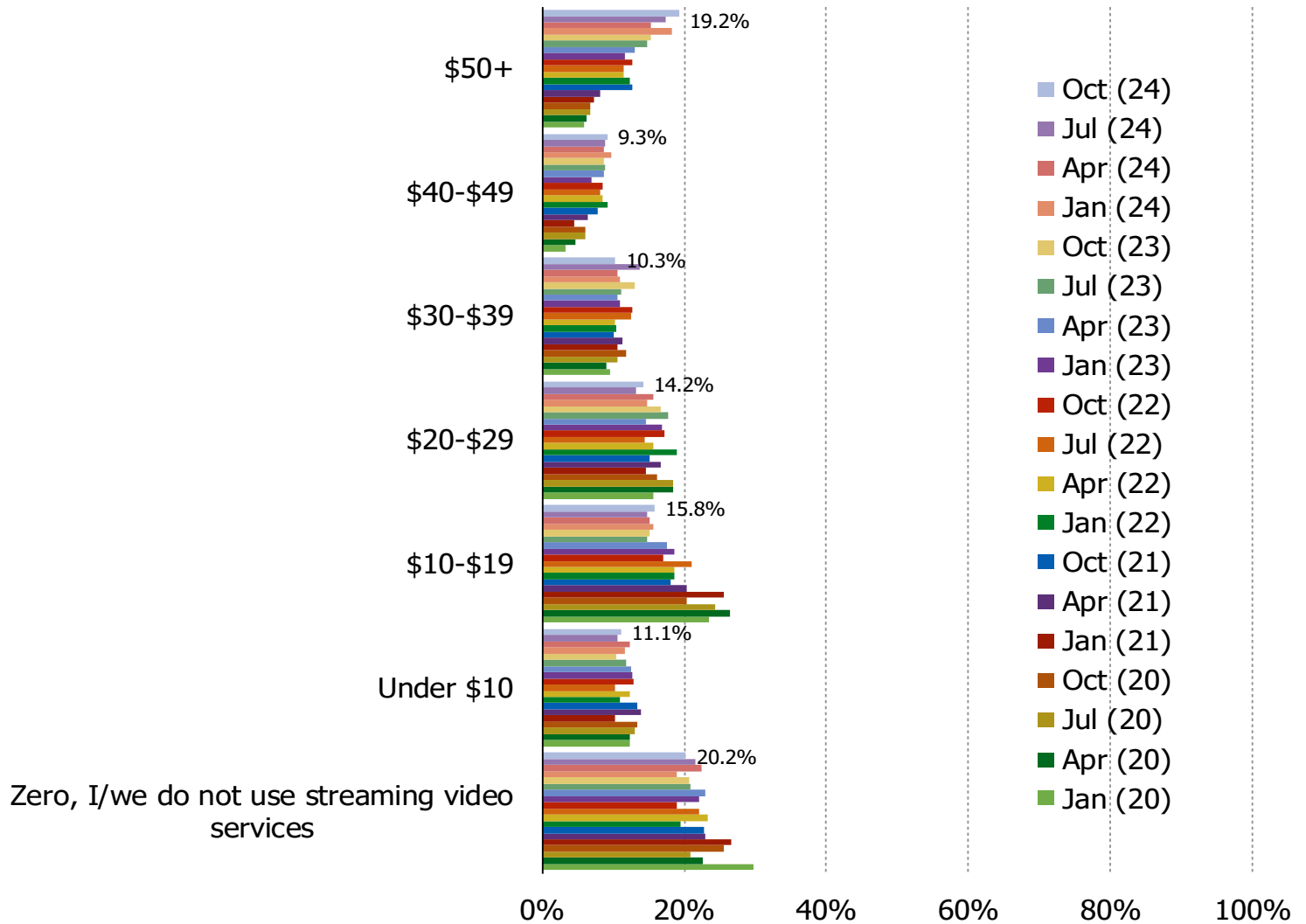
IN THE NEXT YEAR, DO YOU EXPECT THE AMOUNT YOU PAY PER MONTH FOR CABLE OR SATELLITE TV TO CHANGE IN ANY WAY?

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



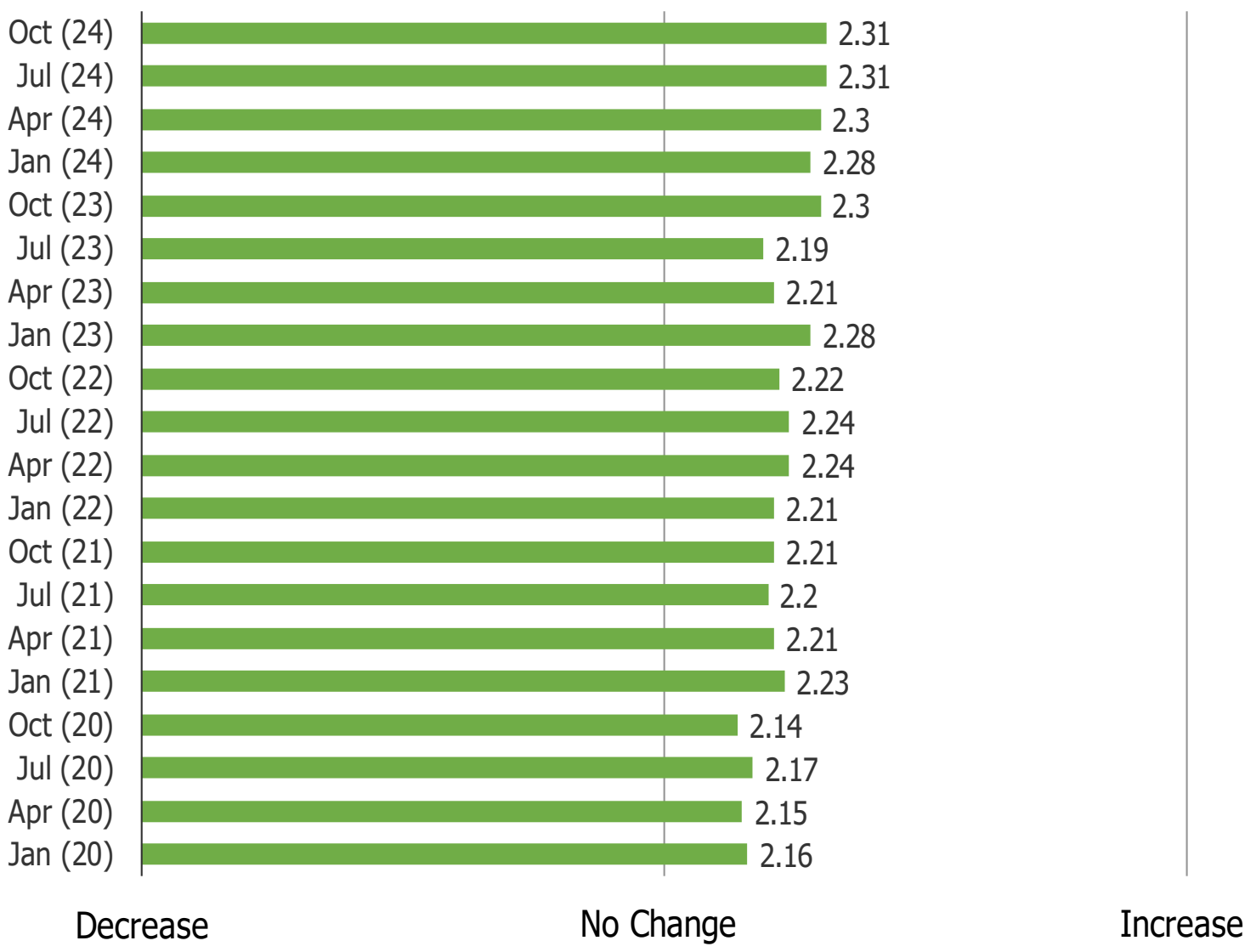
APPROXIMATELY HOW MUCH DO YOU SPEND ON STREAMING VIDEO SERVICES PER MONTH?

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?

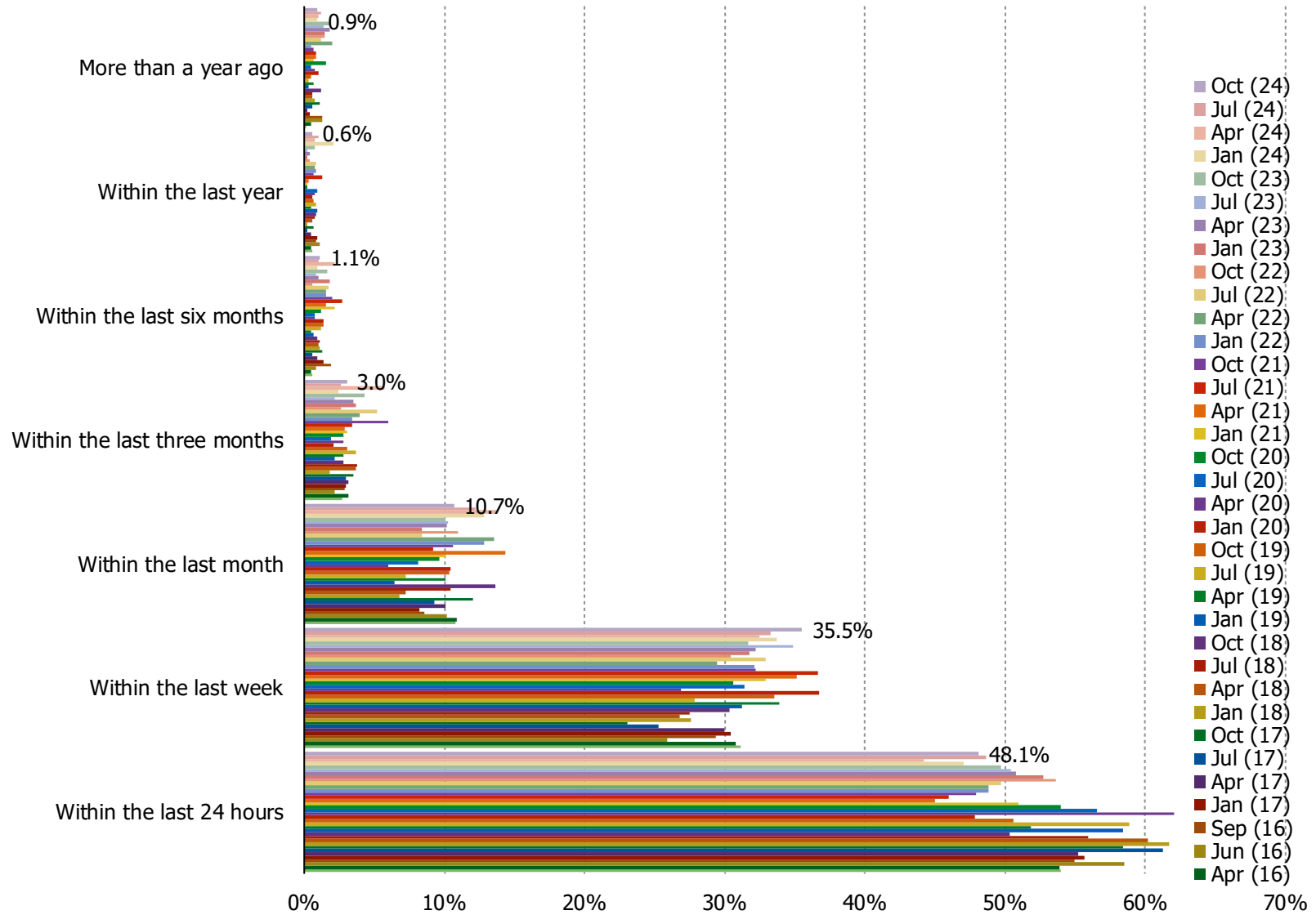
Posed to respondents who currently pay for cable or satellite tv.



NETFLIX SUBSCRIBER ENGAGEMENT

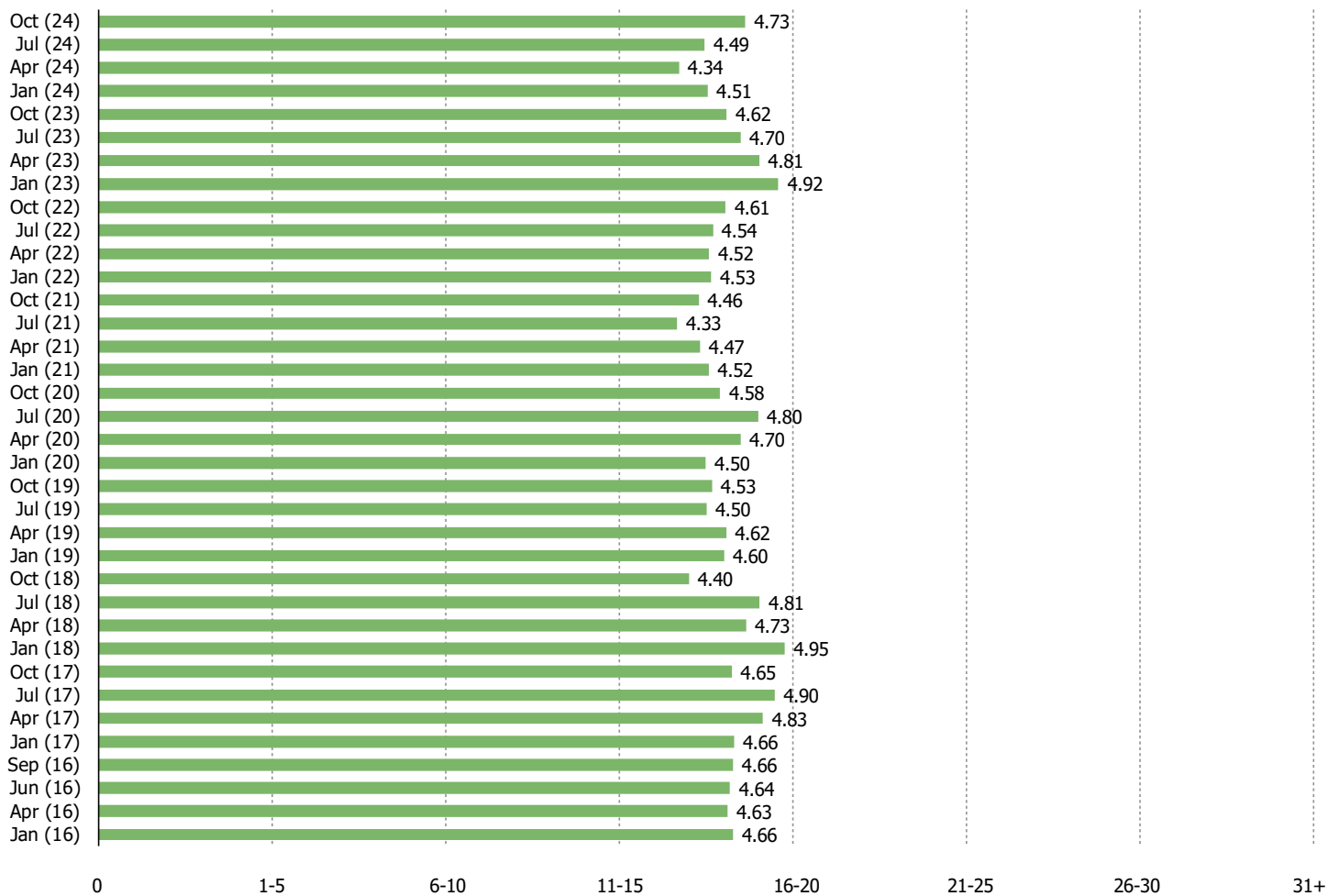
WHEN IS THE LAST TIME YOU WATCHED SOMETHING ON NETFLIX?

Posed to Netflix subscribers.



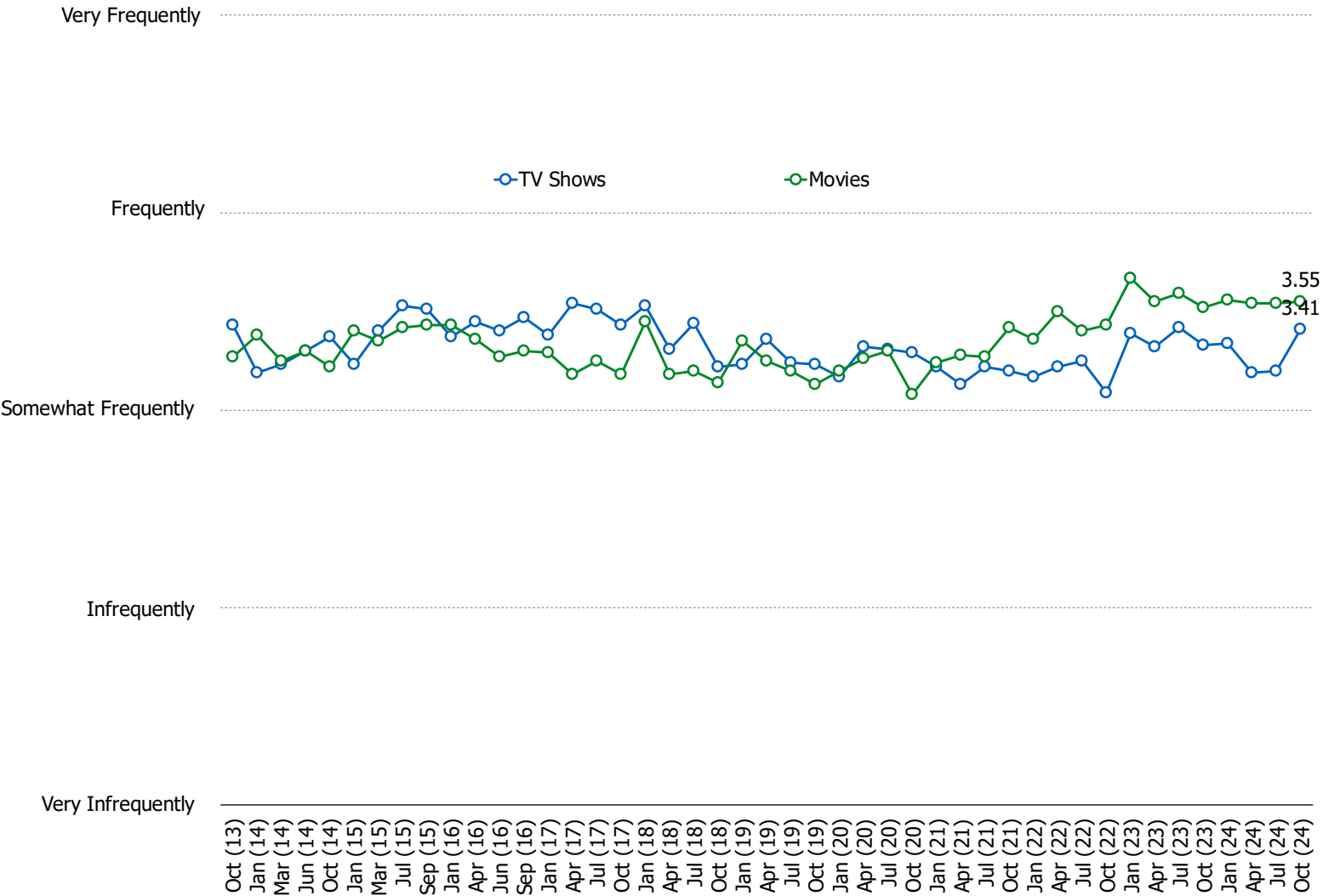
IN AN AVERAGE MONTH, HOW MANY HOURS OF NETFLIX DO YOU WATCH?

Posed to Netflix subscribers.



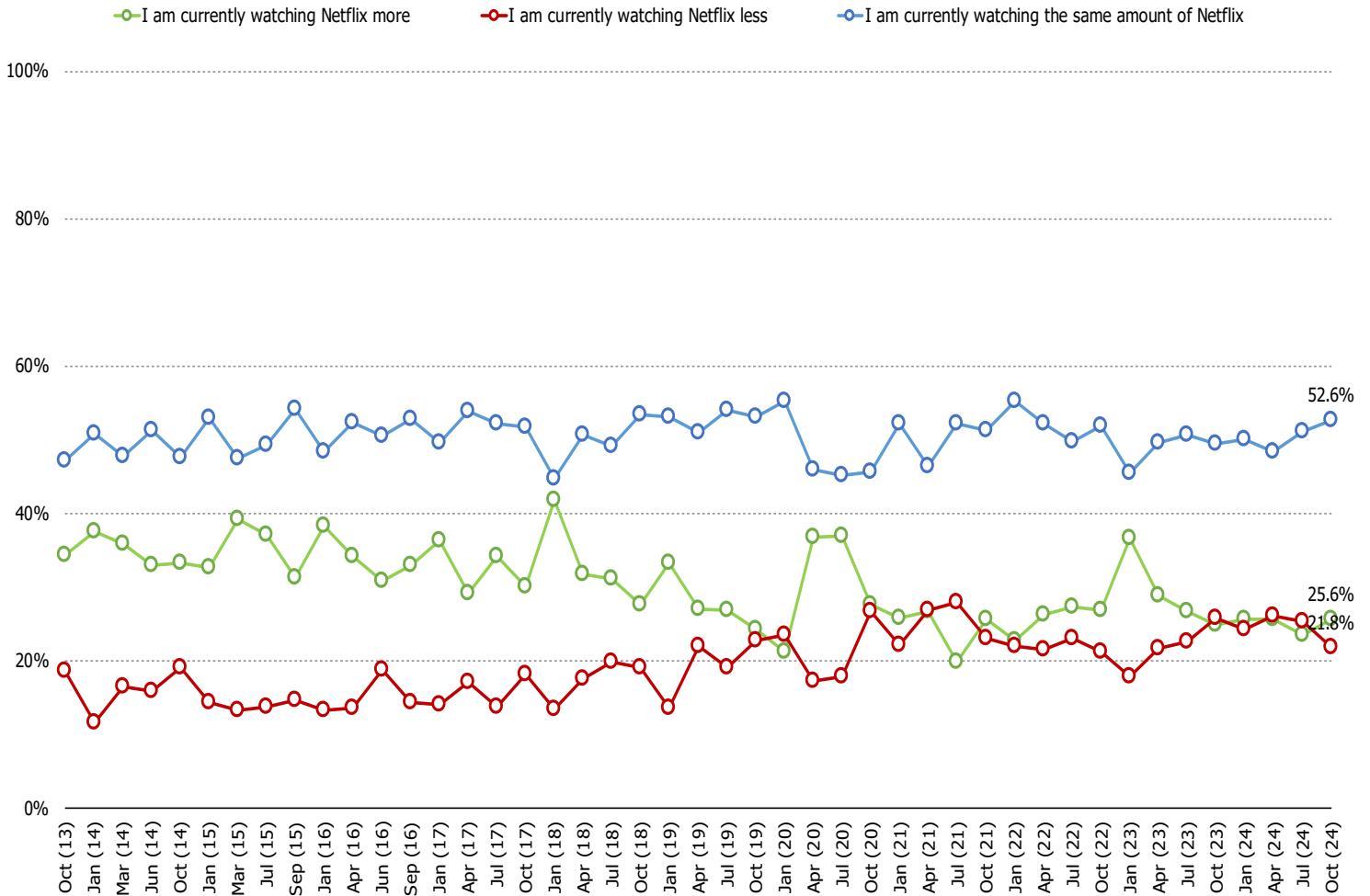
FREQUENCY OF WATCHING TV SHOWS AND MOVIES

Posed to Netflix subscribers.



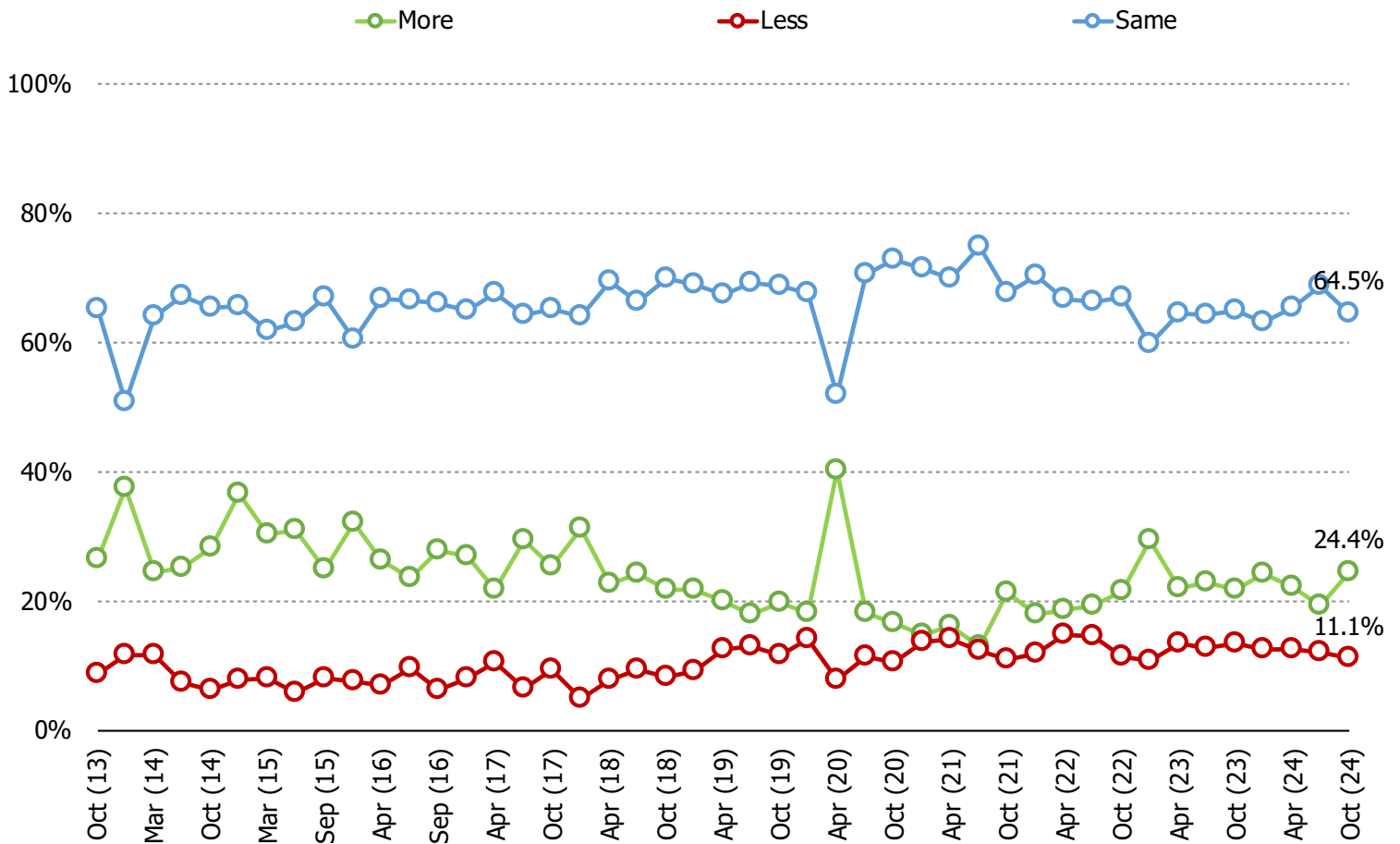
PLEASE COMPARE YOUR CURRENT USAGE OF NETFLIX WITH YOUR USAGE 3-6 MONTHS AGO.

Posed to Netflix subscribers.



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

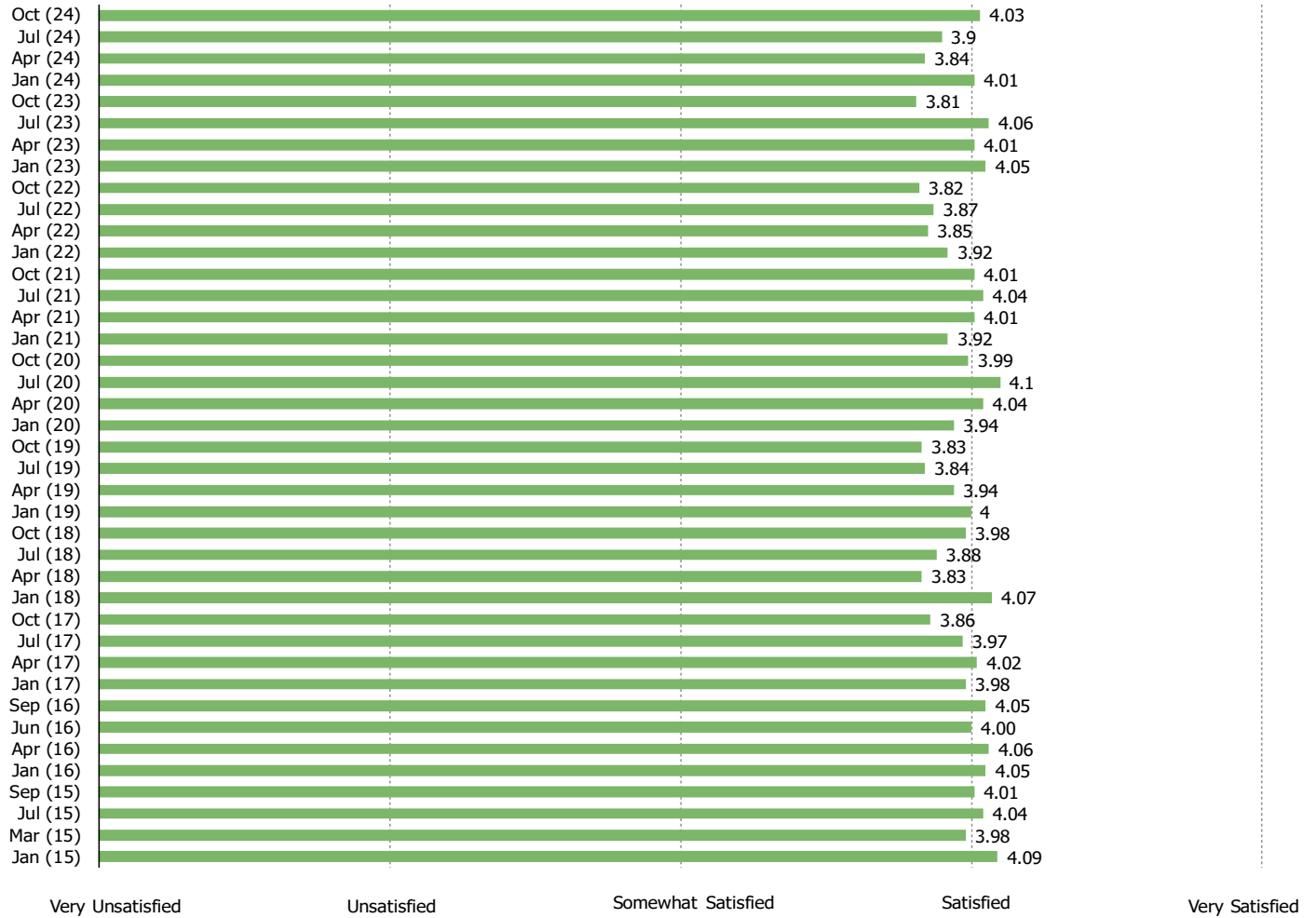
Posed to Netflix subscribers.



NETFLIX PRICING POWER

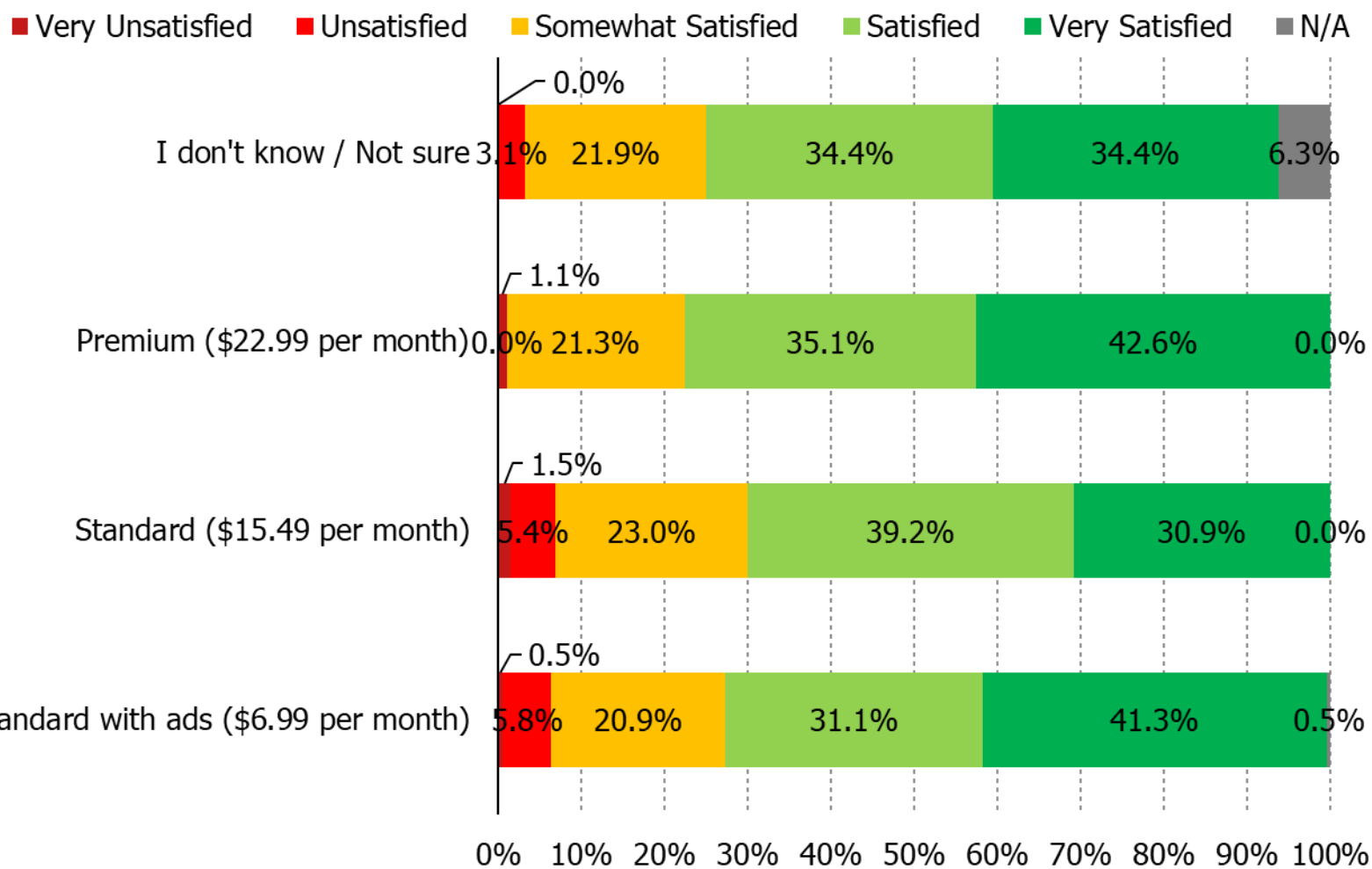
SATISFACTION WITH THE VALUE THEY RECEIVE FOR THE MONEY WITH NETFLIX

Posed to Netflix subscribers.



HOW SATISFIED ARE YOU WITH THE VALUE YOU RECEIVE FROM NETFLIX FOR YOUR MONEY?

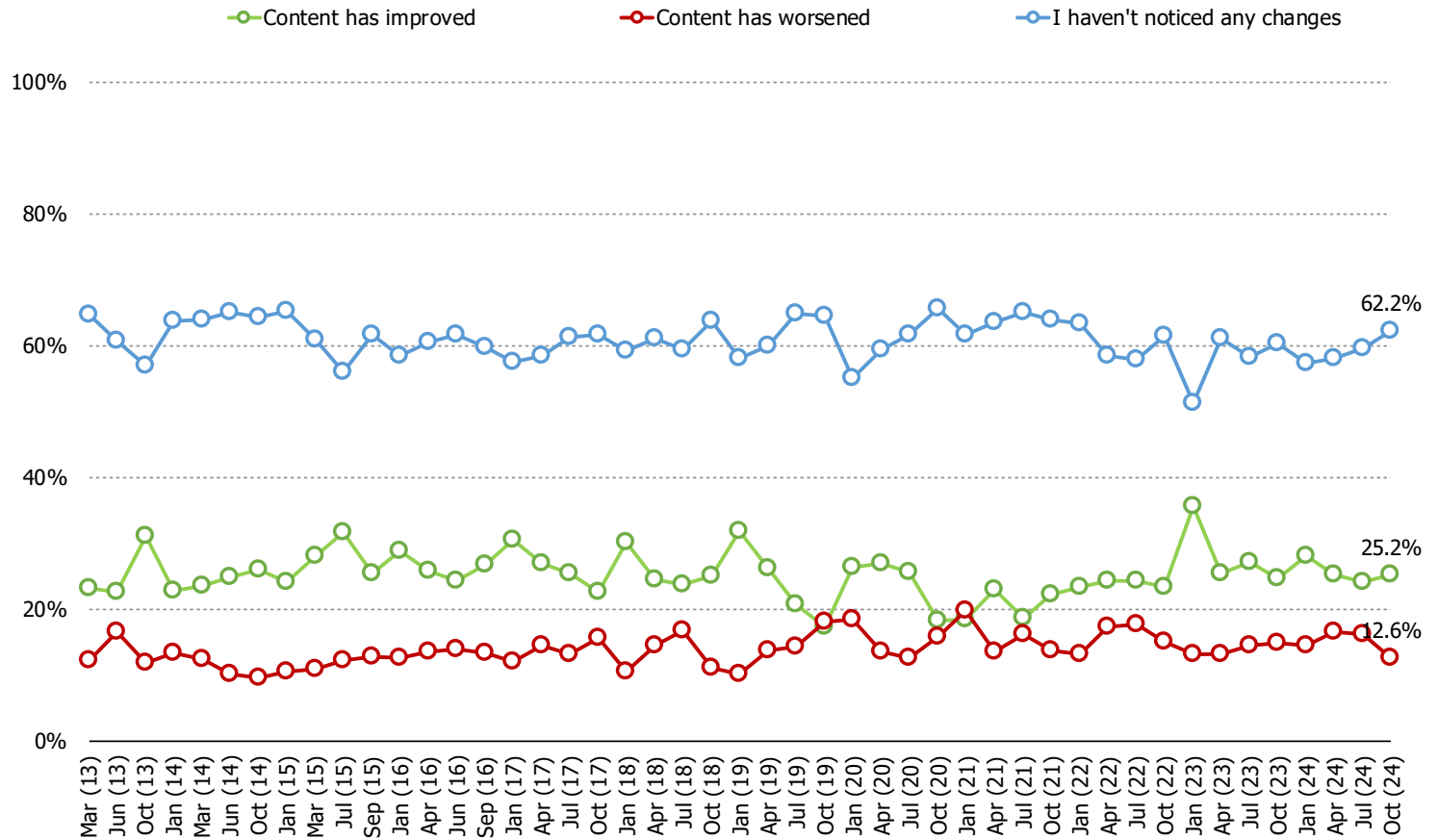
Posed to Netflix subscribers, cross-tabbed by plan...



NETFLIX CONTENT

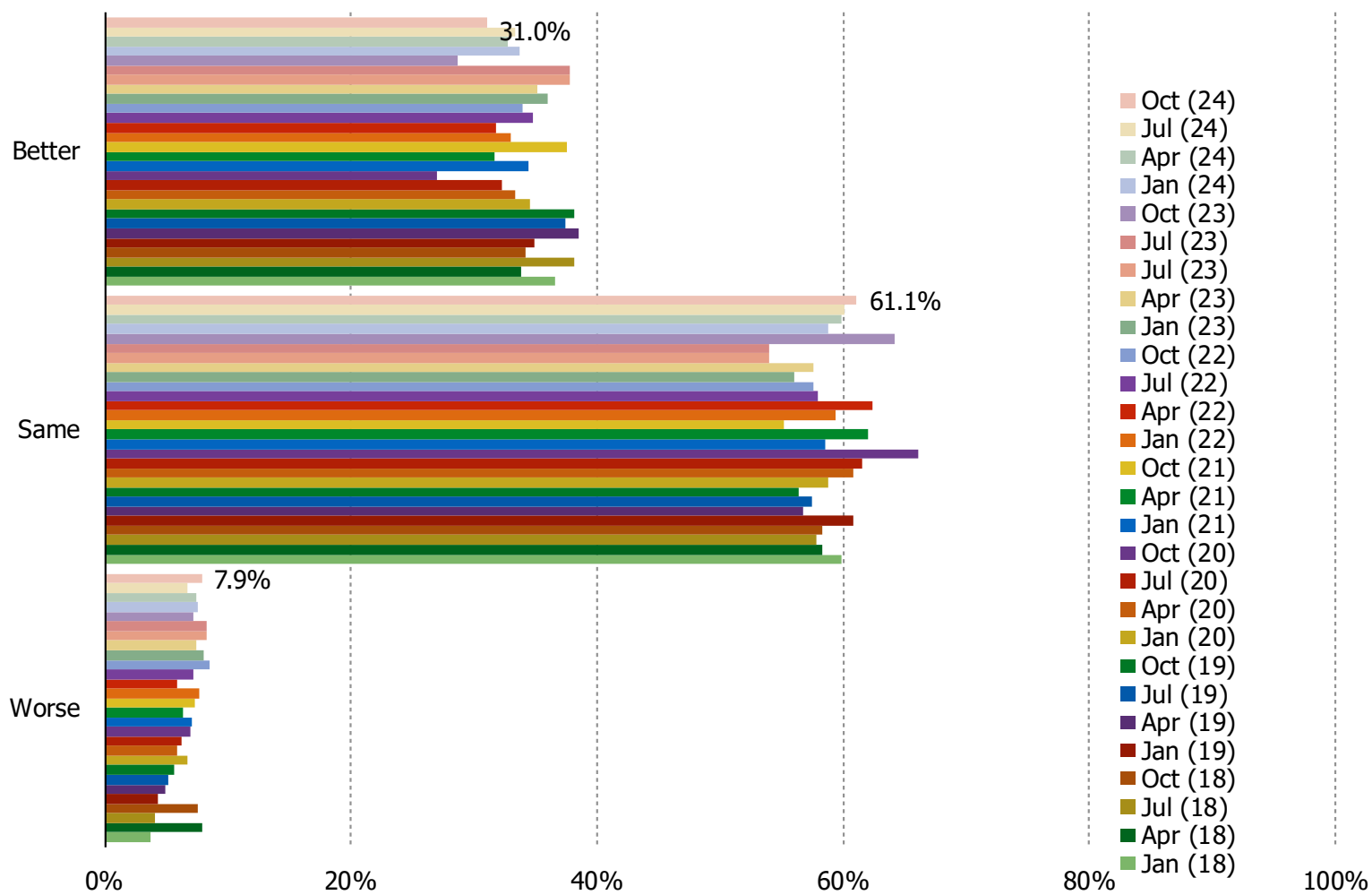
HAVE YOU NOTICED ANY CHANGES TO NETFLIX'S CONTENT OVER THE LAST SIX MONTHS?

Posed to Netflix subscribers.



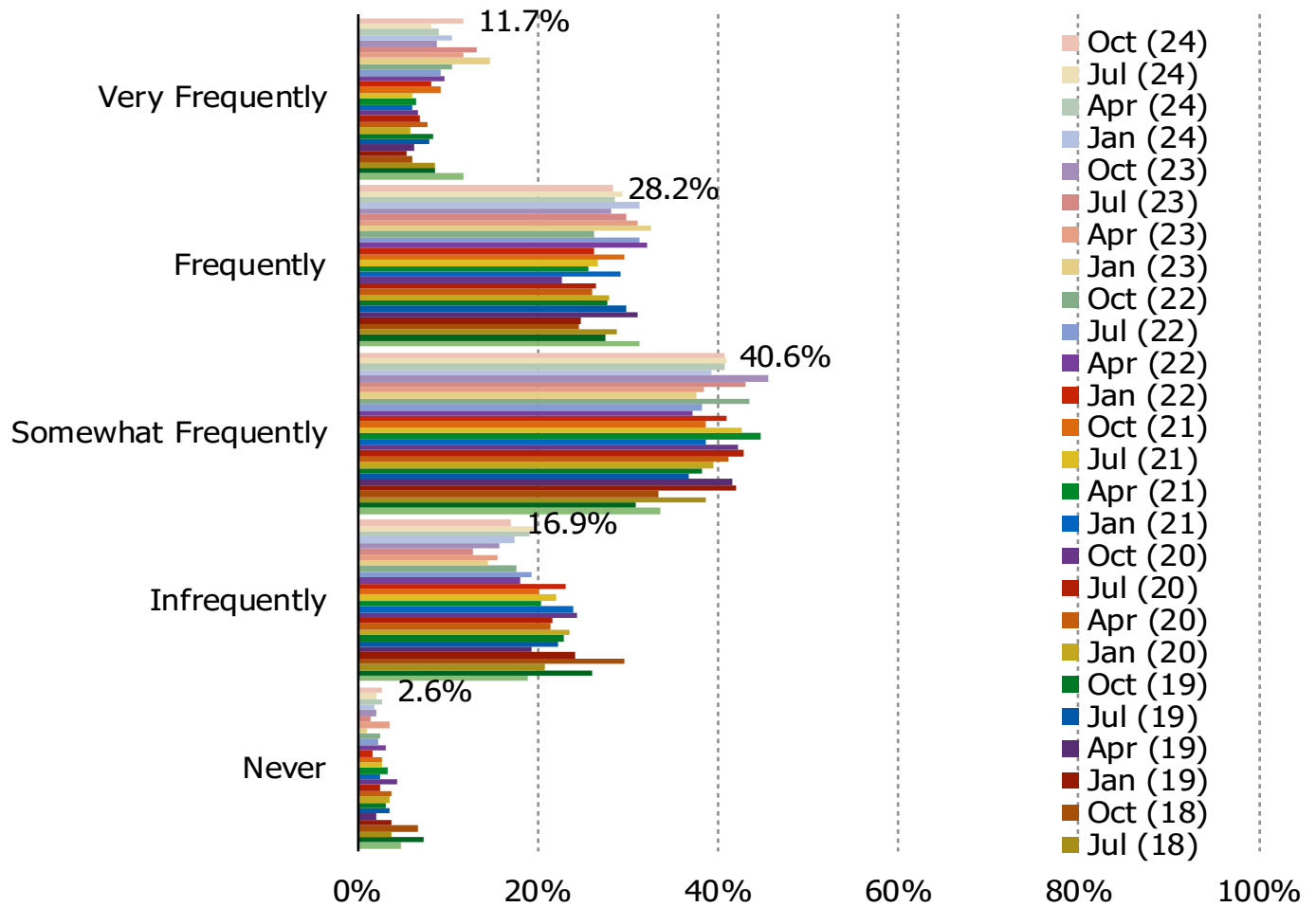
HOW DO YOU COMPARE NETFLIX ORIGINAL CONTENT SHOWS AGAINST SHOWS YOU VIEW ON OTHER NETWORKS OR SERVICES?

Posed to Netflix subscribers.



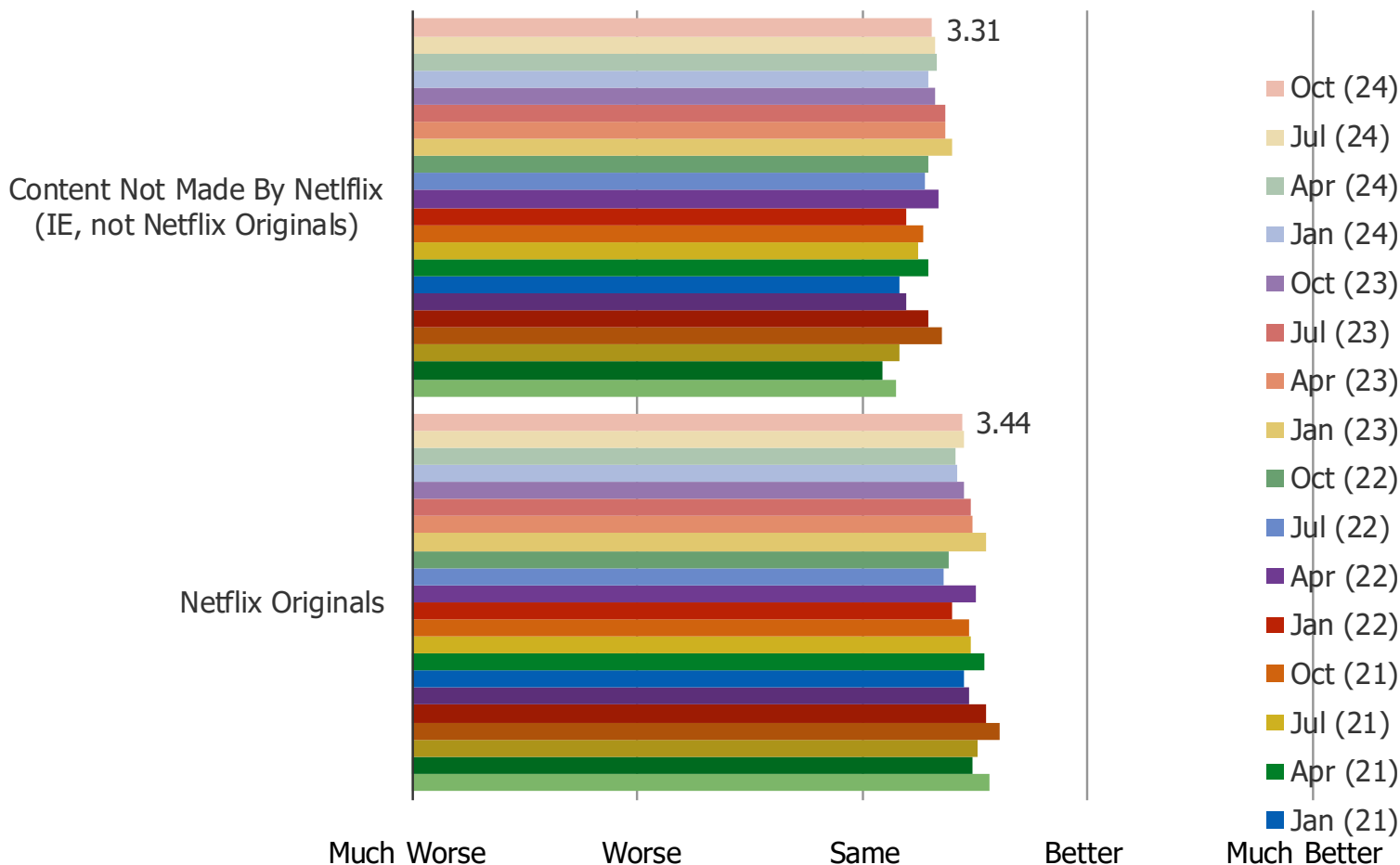
HOW OFTEN DO YOU WATCH NETFLIX ORIGINAL CONTENT SHOWS?

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?

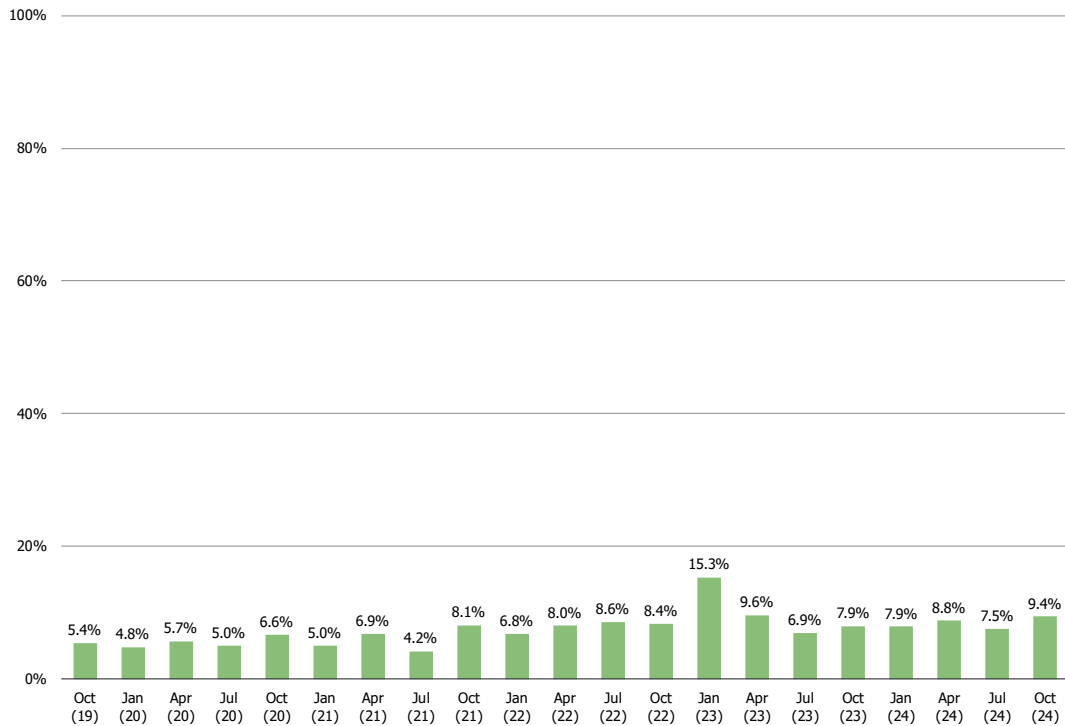
Posed to Netflix subscribers.



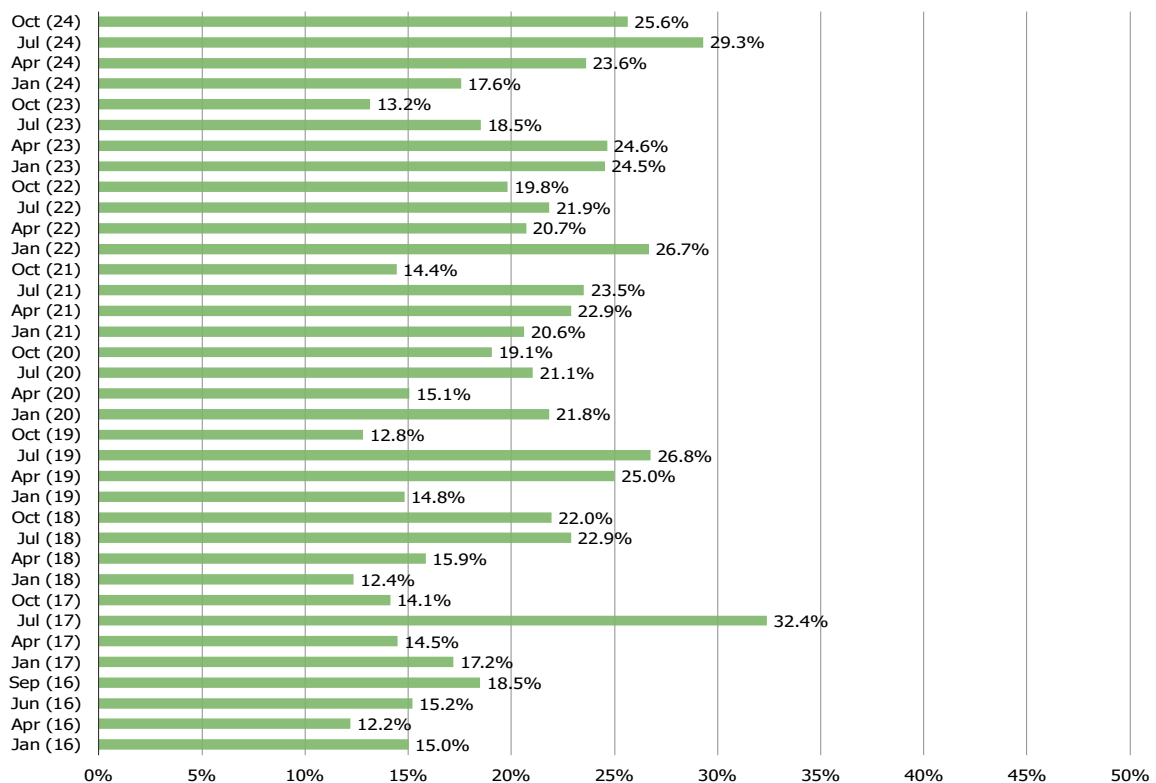
CYCLING IN AND OUT OF NETFLIX

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.



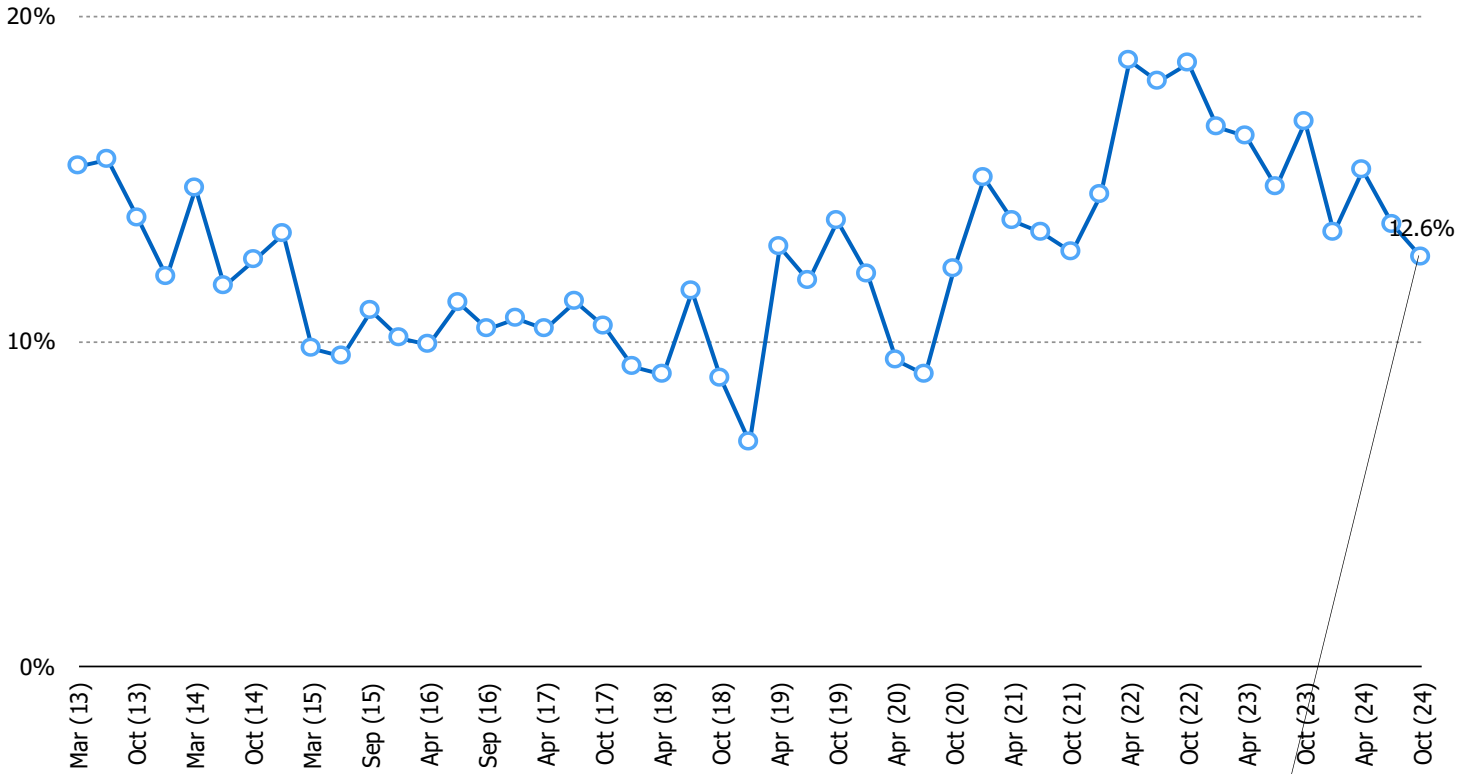
Posed to respondents who are not current Netflix subscribers but have been in the past.



NFLX CHURN

ARE YOU CONSIDERING CANCELLING YOUR NETFLIX SUBSCRIPTION?

Posed to Netflix subscribers.

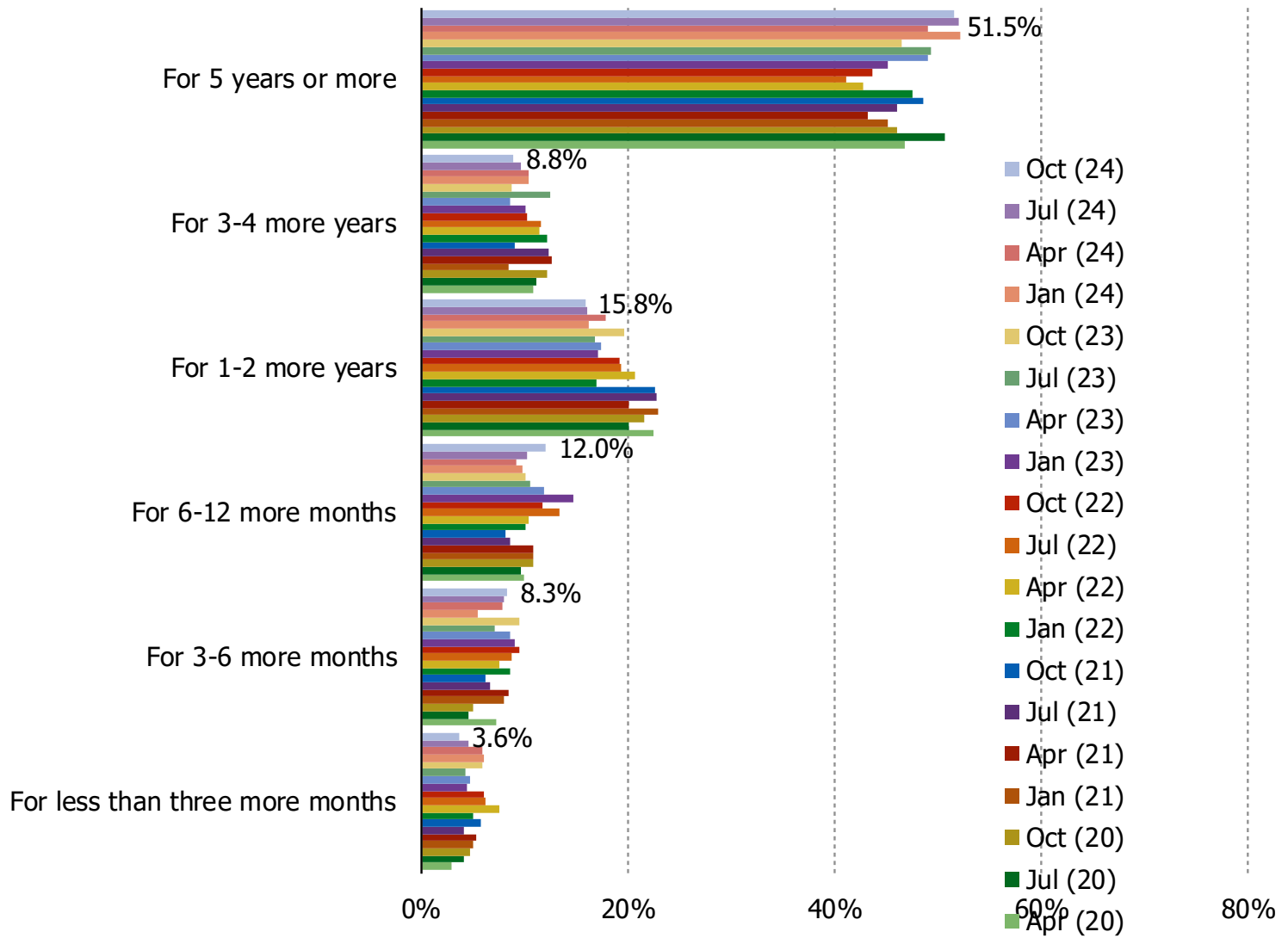


Why?



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.

