

# Bespoke Survey Research

January 2025

## Streaming Video Survey

### Volume 47 | Quarterly Survey

1,000 US Consumers Balanced To Census

Tickers Covered: NFLX, DIS, T, CMCSA.

### **Key Takeaways:**

#### **Live Sports – NFL was Better than the Boxing**

- The recent live sporting events on Netflix were well attended by subscribers. Respondents who watched the NFL games report a much better watching experience compared to those who watched the Paul vs. Tyson fight. The majority of respondents who watched these events watched with at least one other person (ie, only 21-25% watched alone). Focusing on the NFL games, those who watched it believed that Netflix's streaming quality was better than other platforms that stream live sports. In general, interest in watching live sports on Netflix has increased sequentially.

#### **Cord Cutting – Flat for Three Quarters. Sports, Need-to-Have Rating, and Cost/Value**

- The share of consumers who currently subscribe to Cable TV comes in at 51.3%, which has been flat to slightly up since reaching a series low in July of 2024. After YouTube Premium and YouTube, Cable or Satellite TV is most likely to be viewed as a "need to have" by its subscribers (compared to other streaming platforms that we ask about). The gripe with cable is tied to costs/value – it is the main reason cited for churn or contemplated churn, and active subs are relatively less satisfied with value to cost compared to subs of streaming platforms. Sports datapoint: respondents who rank sports higher in their hierarchy of what they watch on TV are more likely to currently be Cable subscribers (page 84).

#### **Ad Supported Netflix – Mix Shifts Continues, Attracting New Customers, Positive Feedback**

- The share of Netflix subscribers who are on the Standard With Ads plan continues to increase and reached a new series high in our survey. Standard With Ads subscribers view the content, speed, reliability, and video quality as better than their expectations (number of commercials is roughly in line to expectations). A plurality of Standard With Ads subscribers were not Netflix subscribers prior to signing up. Over time, the share of Standard with Ads customers who didn't have an account previously has increased. Lastly, there is a good deal of interest in a hypothetical free version of Netflix with ads.

#### **Account Sharing – Continues to Decline**

- The share of respondents sharing Netflix accounts with people outside of their household has declined considerably.

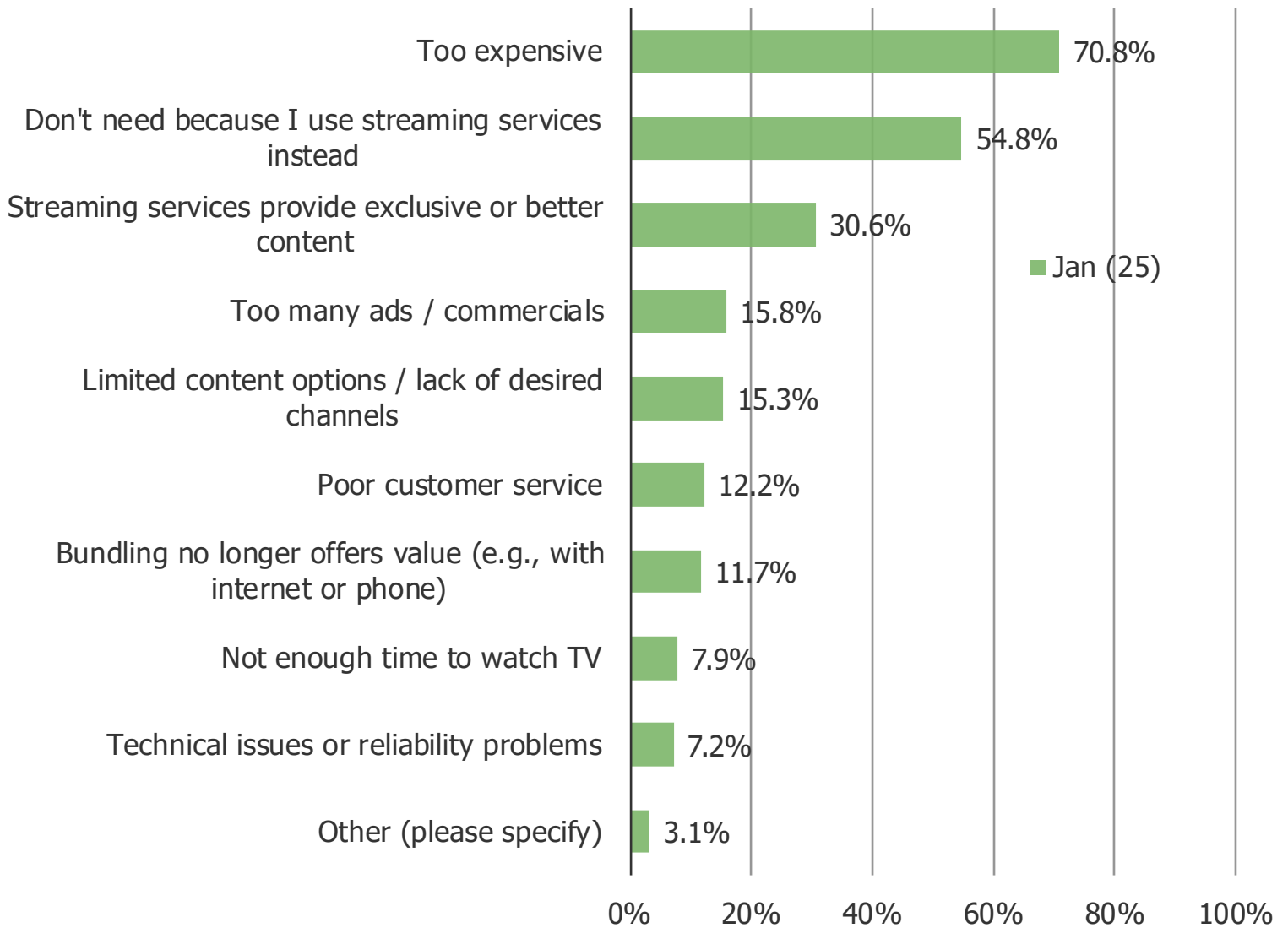
#### **Churn and Pricing – Churn Intentions Decline and are Near Series Lows**

- The share of Netflix subscribers contemplating churning fell again this quarter and is near series lows. The price point that would trigger cancellation remains in the ~\$28 range, on average. The price point for Standard with Ads continues to test well (consumers think it is a good deal/value).

# NEW QUESTIONS THIS WAVE

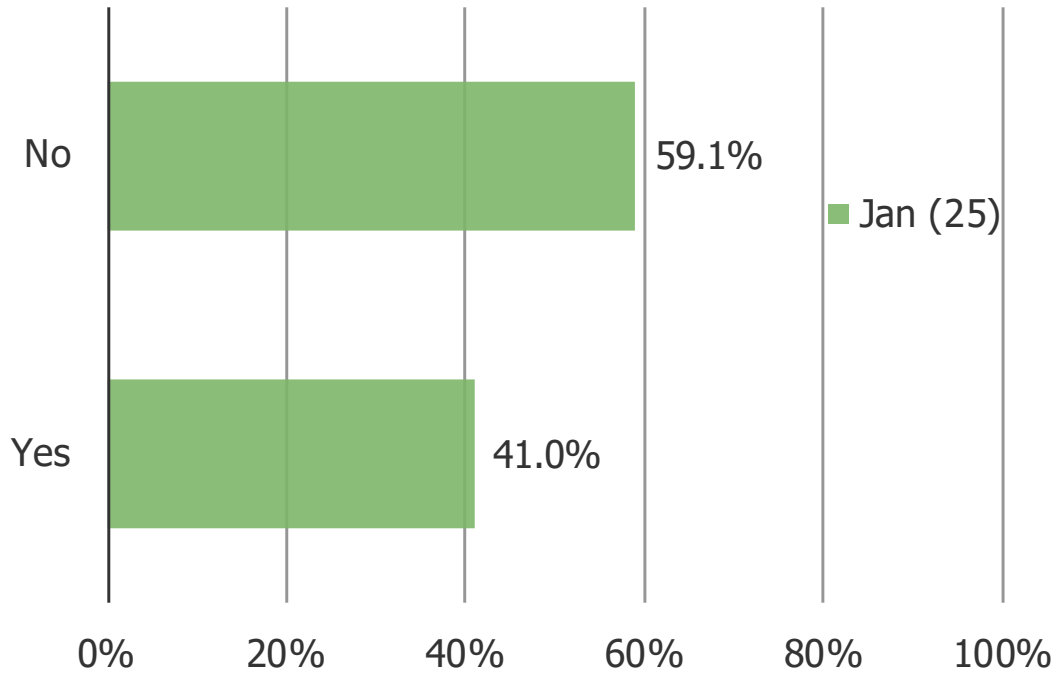
WHICH OF THE FOLLOWING BEST DESCRIBES WHY YOU DON'T HAVE A CABLE, SATELLITE, OR TELCO TV SUBSCRIPTION? SELECT ALL THAT APPLY

Posed to all respondents who do not have a cable/satellite/telco TV subscription.



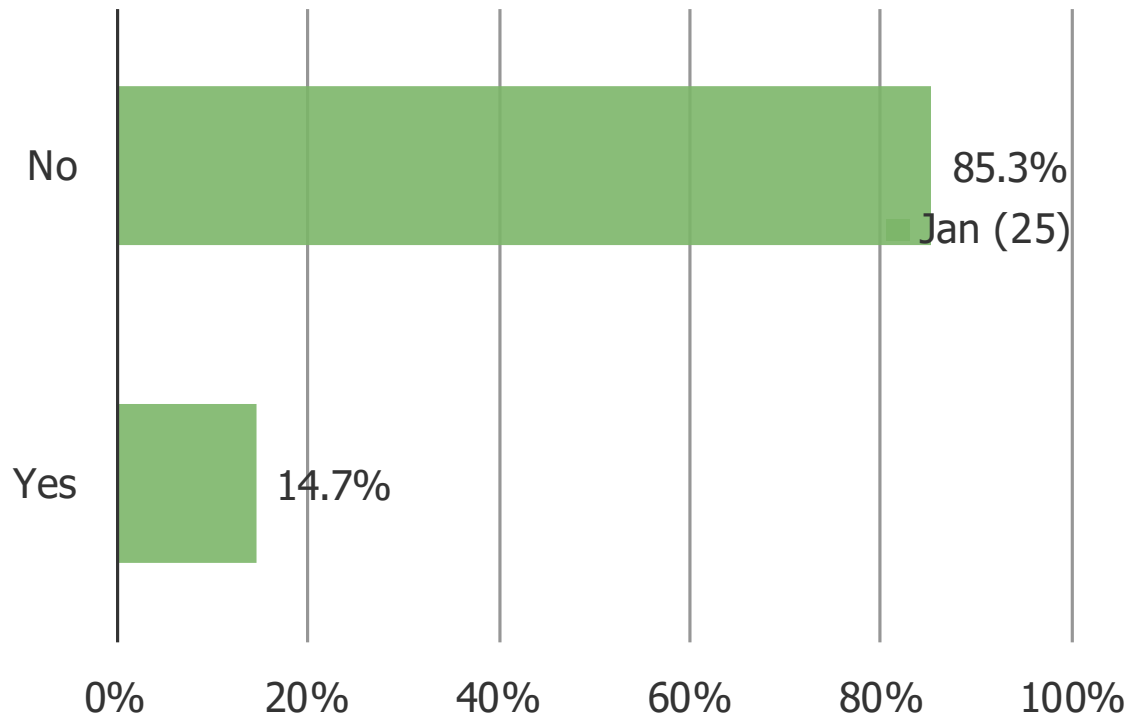
DO FREE STREAMING SUBSCRIPTIONS INCLUDED IN YOUR PAYTV PACKAGE LOWER YOUR LIKELIHOOD OF CANCELLING?

Posed to all respondents who subscribe to cable, satellite, or telco TV.



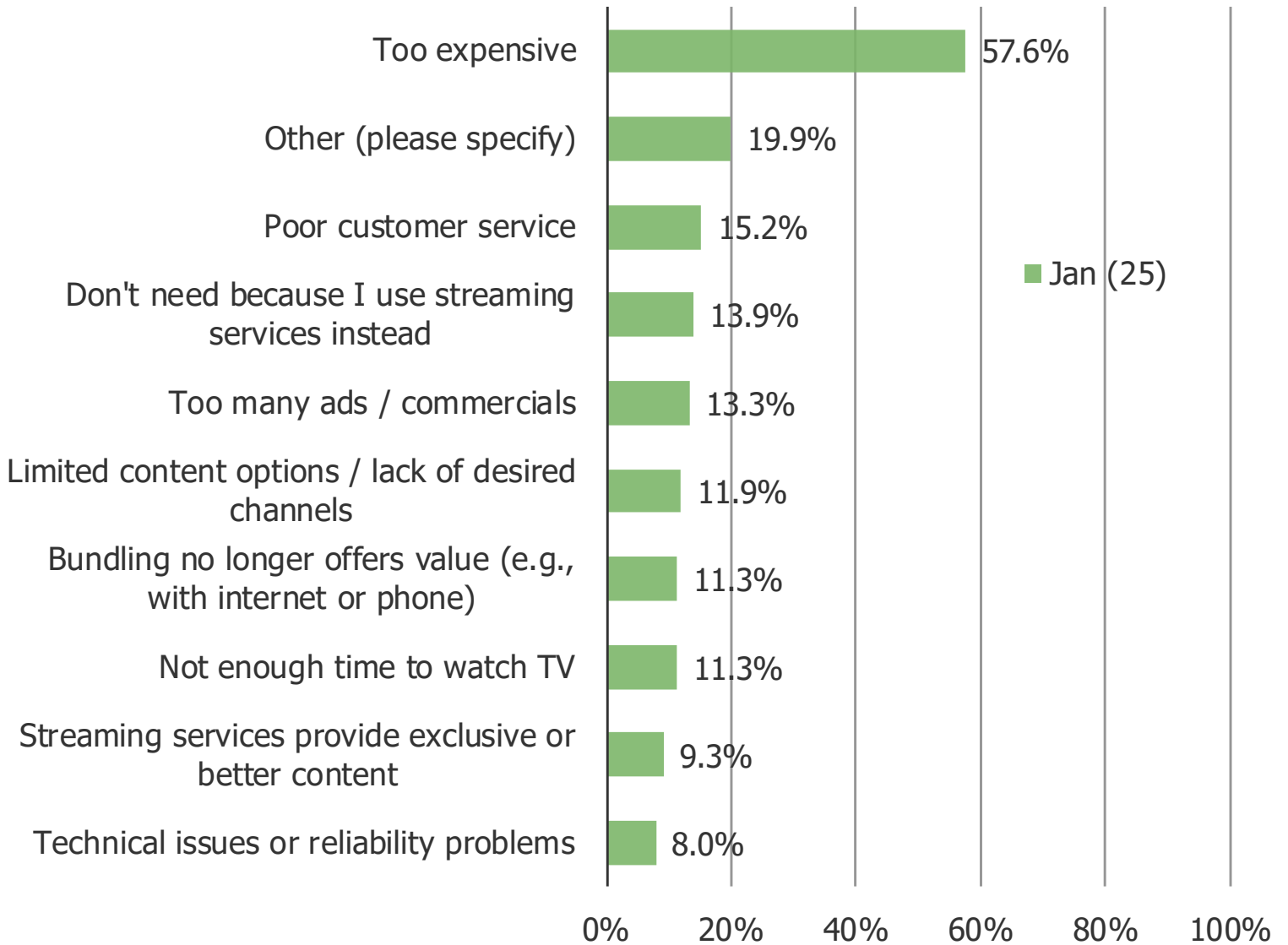
DO YOU INTEND TO CANCEL YOUR CABLE, SATELLITE, OR TELCO TV SUBSCRIPTION IN THE NEXT 6-12 MONTHS?

Posed to all respondents who subscribe to cable, satellite, or telco TV.



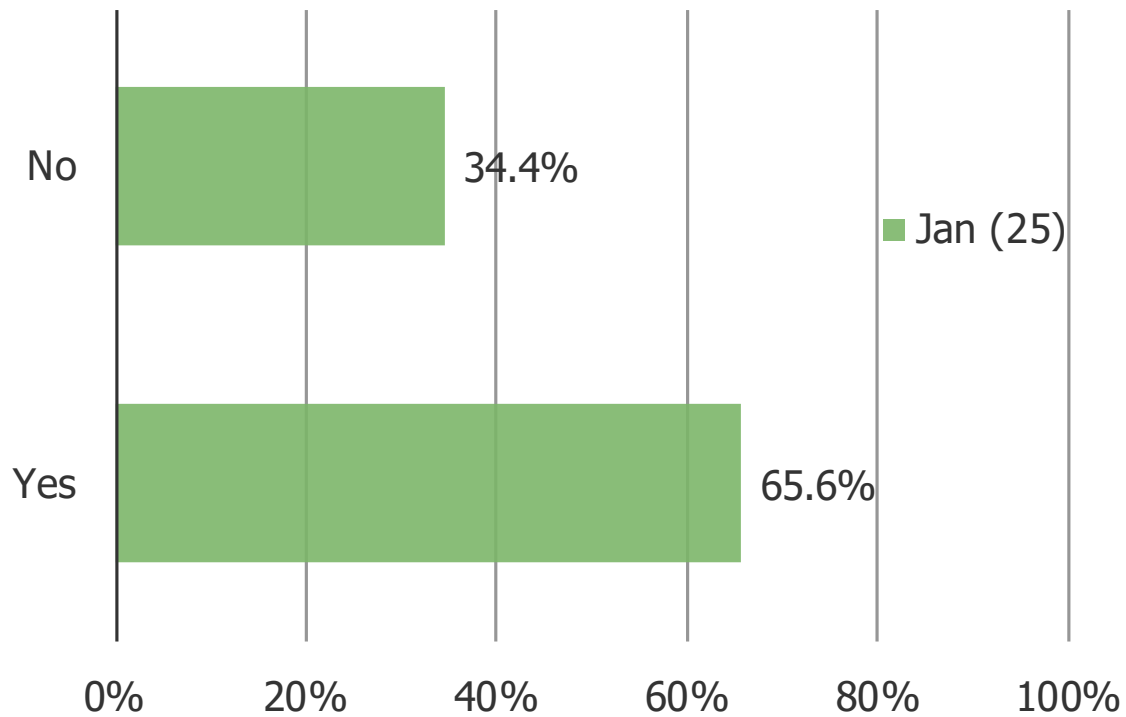
WHAT ARE THE REASONS FOR WHY YOU INTEND TO CANCEL CABLE, SATELLITE, OR TELCO TV SUBSCRIPTION?

Posed to all respondents who intend to cancel their cable, satellite, or telco TV subscription in the next 6-12 months.



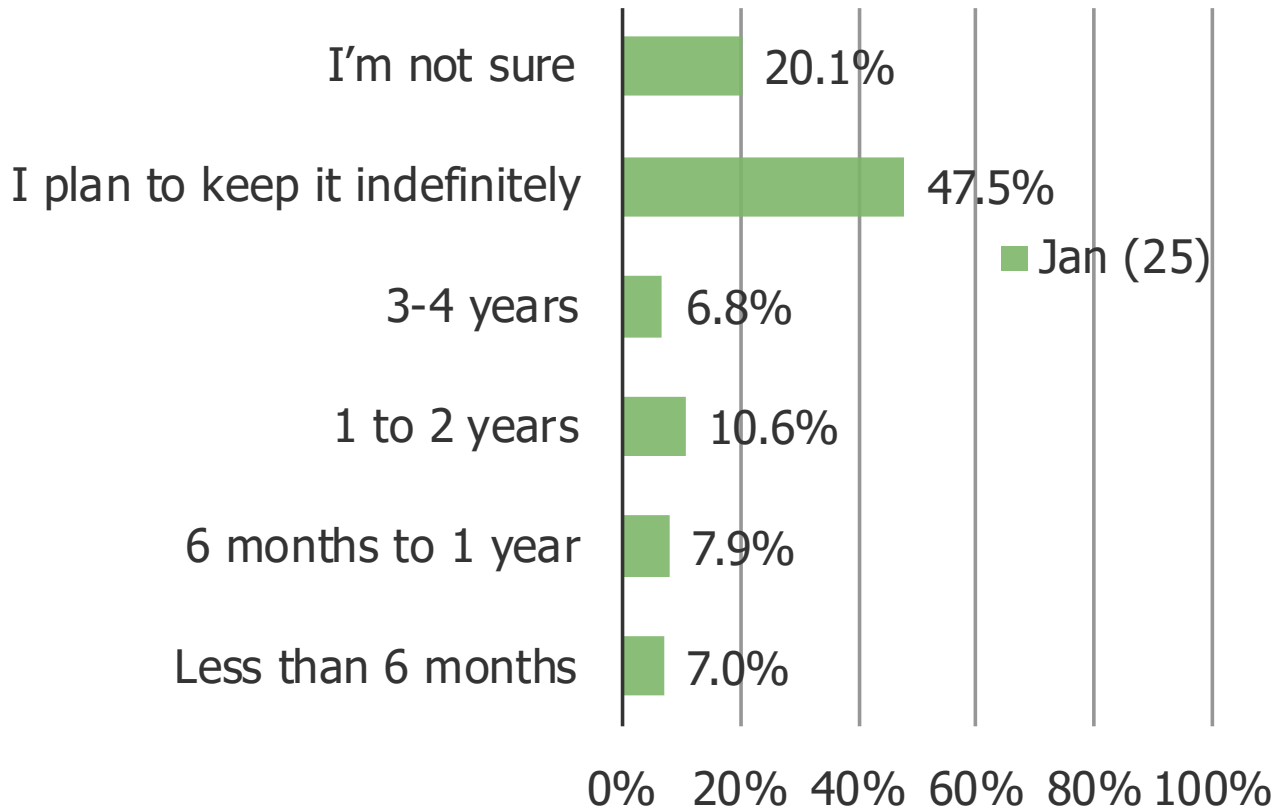
IF YOU CANCEL, WILL YOU USE A STREAMING SERVICE THAT PROVIDES LIVE TV AND ON-DEMAND CONTENT OVER THE INTERNET (E.G., YOUTUBE TV, HULU + LIVE TV, PHILO, SLING, FUBOTV, ETC.)

Posed to all respondents who intend to cancel their cable, satellite, or telco TV subscription in the next 6-12 months.



FOR HOW MUCH LONGER DO YOU THINK YOU WILL HAVE A CABLE, SATELLITE, OR TELCO TV SUBSCRIPTION?

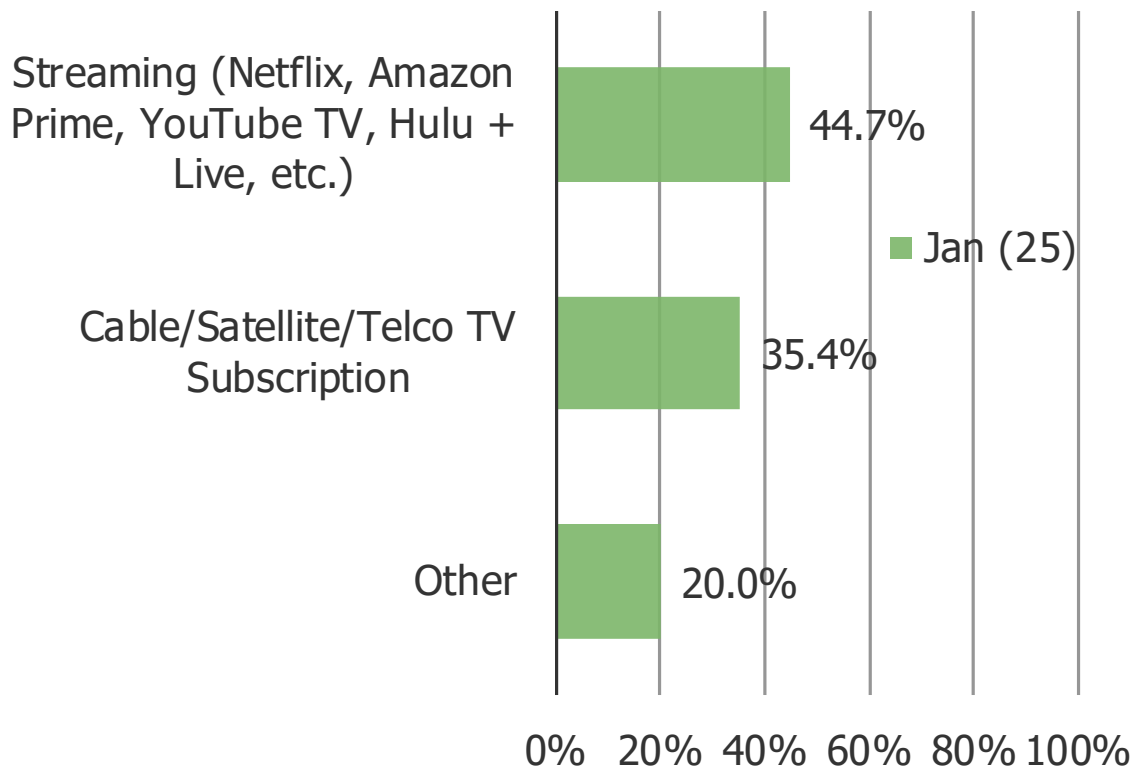
Posed to all respondents who subscribe to cable, satellite, or telco TV.





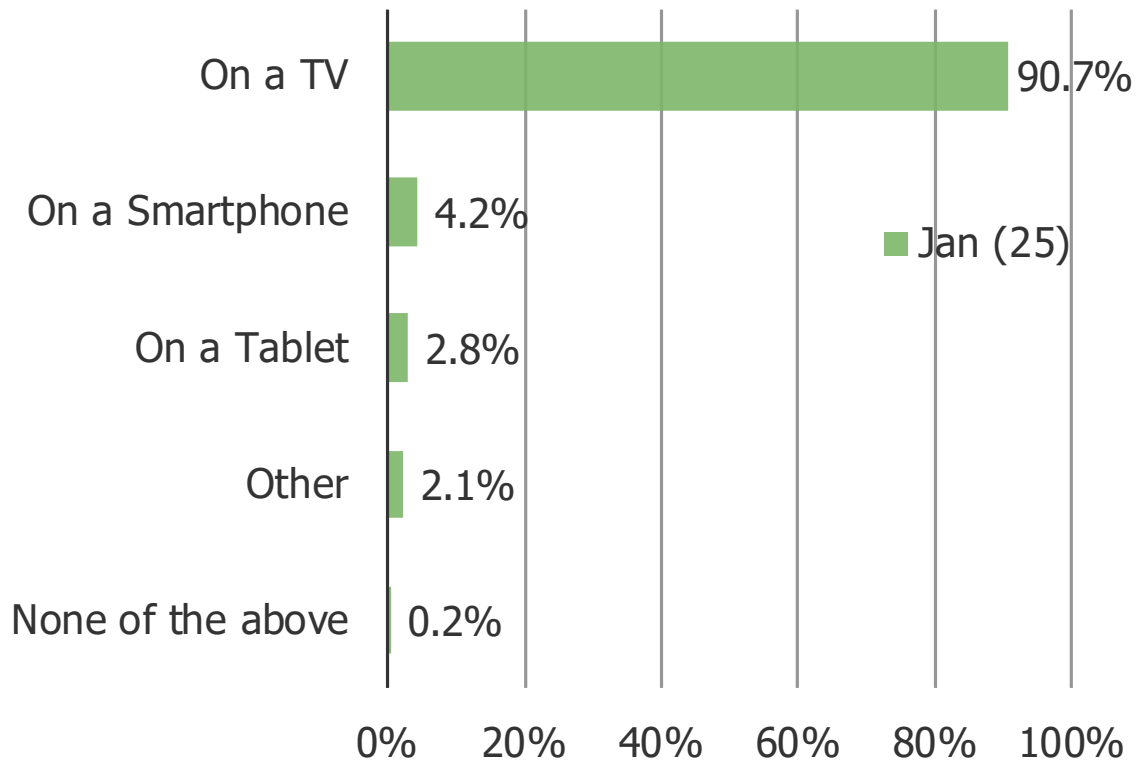
WHAT IS YOUR PREFERRED METHOD FOR WATCHING SPORTS?

Posed to all respondents who watch movies and/or TV shows at home through cable, satellite, or telco TV or streaming services.



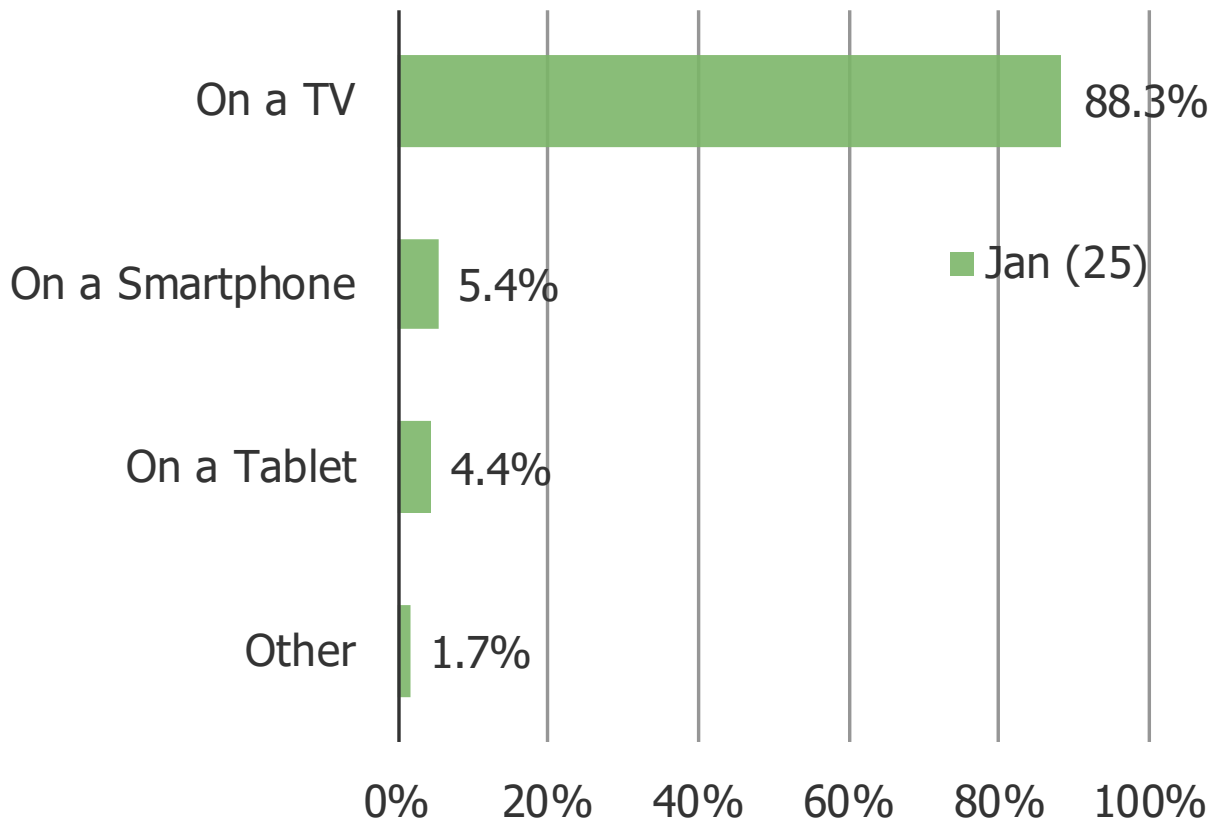
WHAT IS YOUR PREFERRED METHOD FOR WATCHING MOVIES?

Posed to all respondents who watch movies and/or TV shows at home through cable, satellite, or telco TV or streaming services.



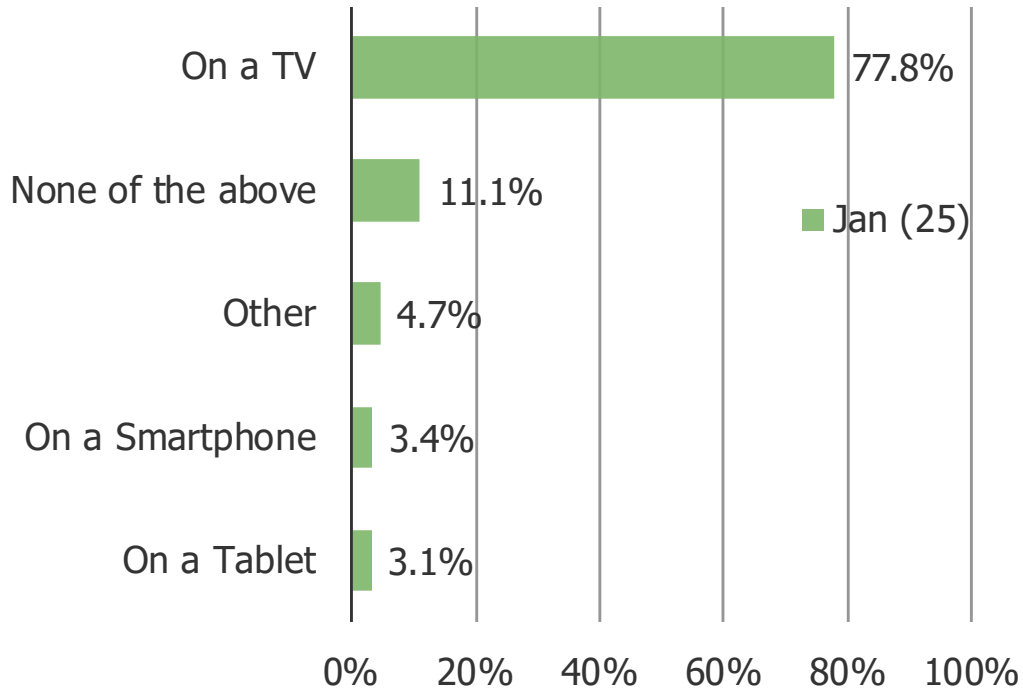
WHAT IS YOUR PREFERRED METHOD FOR WATCHING TELEVISION SHOWS?

Posed to all respondents who watch movies and/or TV shows at home through cable, satellite, or telco TV or streaming services.



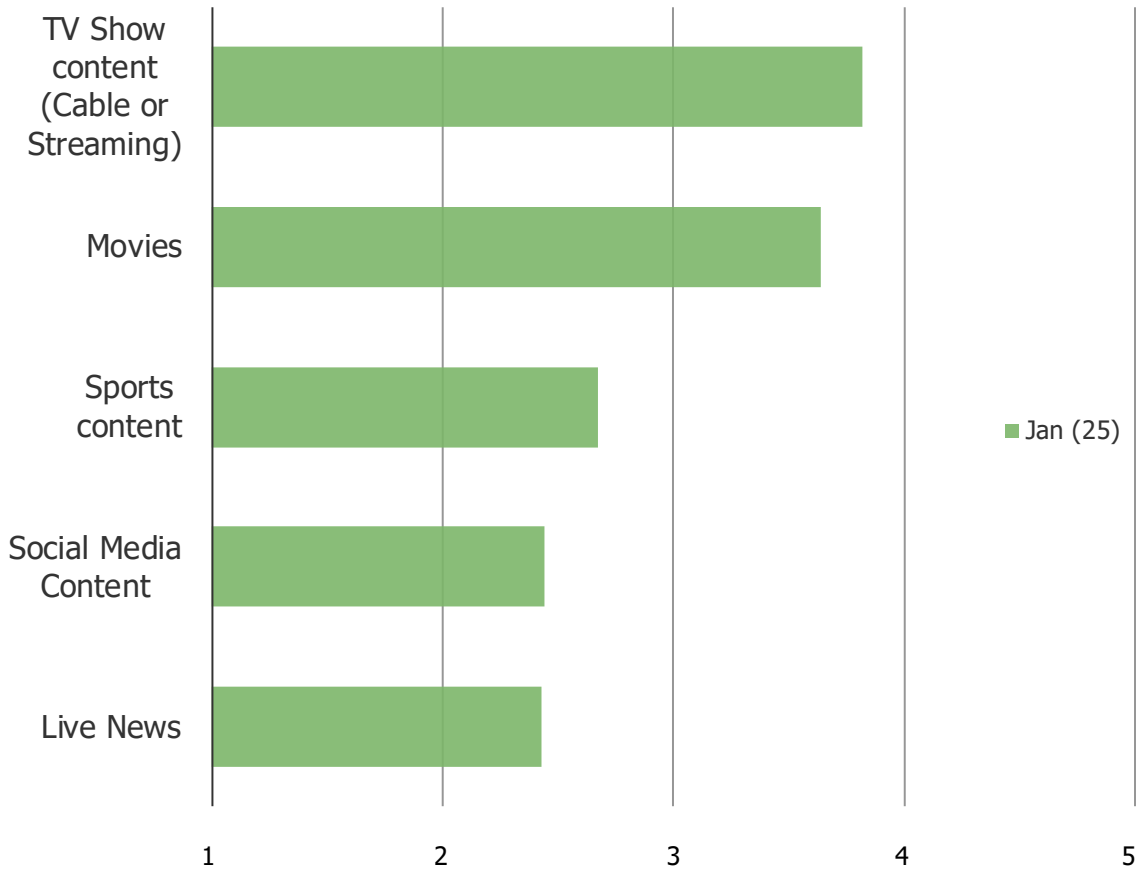
WHAT IS YOUR PREFERRED METHOD FOR WATCHING SPORTS?

Posed to all respondents who watch movies and/or TV shows at home through cable, satellite, or telco TV or streaming services.



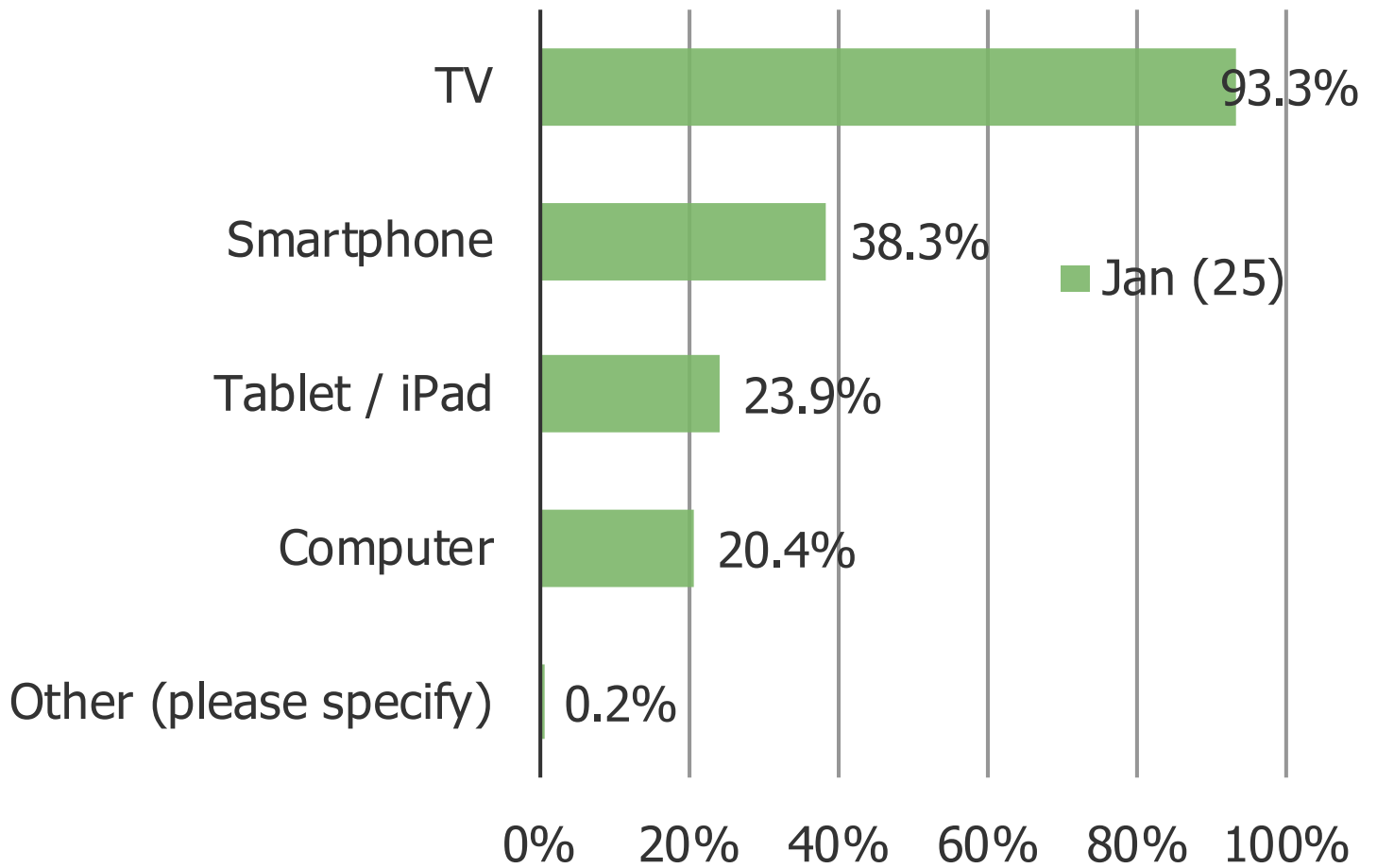
PLEASE RANK WHAT TYPE OF CONTENT YOU PREFER, FROM MOST AT THE TOP TO LEAST AT THE BOTTOM.

Posed to all respondents who watch movies and/or TV shows at home through cable, satellite, or telco TV or streaming services.



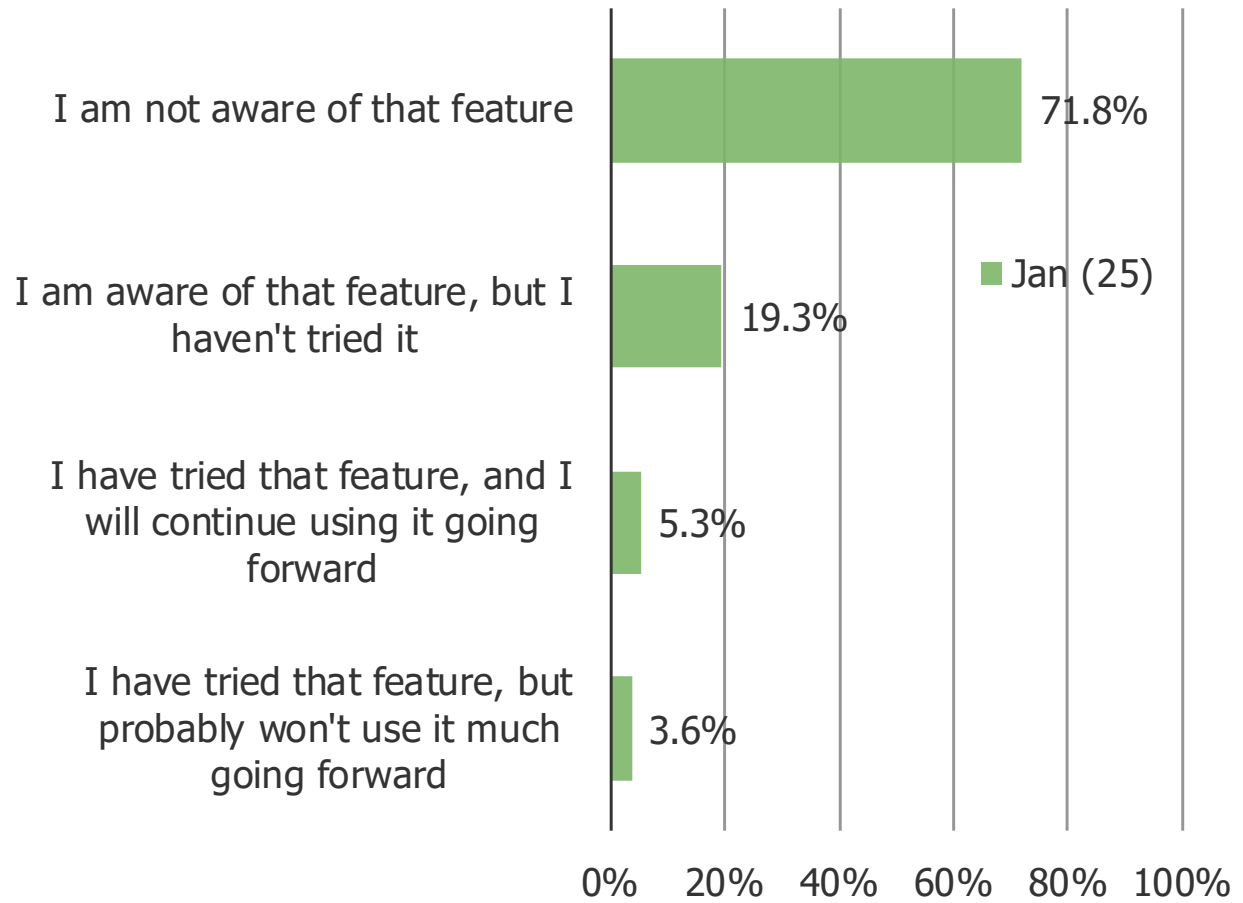
HOW DO YOU WATCH NETFLIX? SELECT ALL THAT APPLY

Posed to all Netflix subscribers.



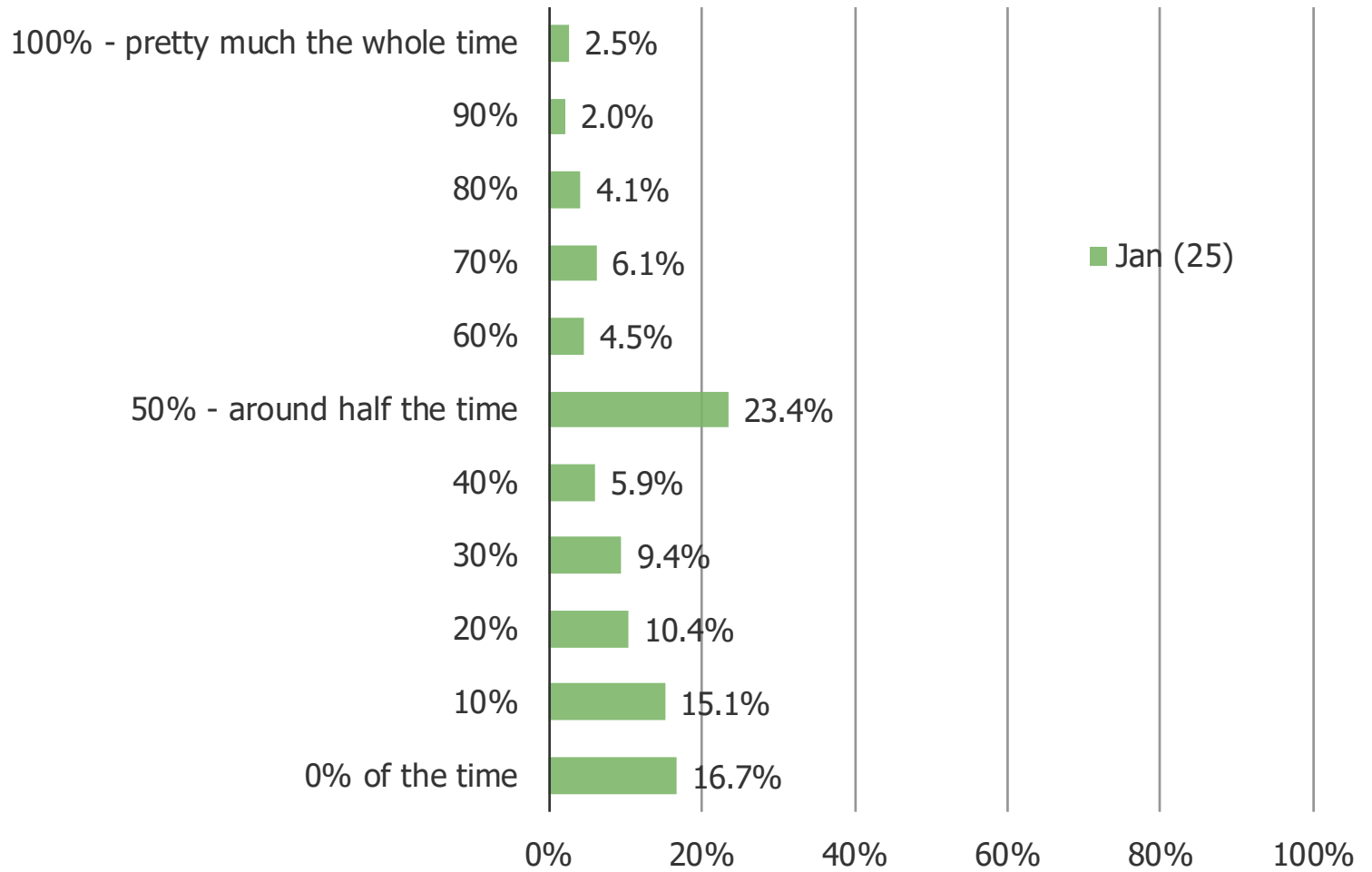
WHAT IS YOUR EXPERIENCE WITH THE NETFLIX FEATURE CALLED "MOMENTS", WHICH ALLOWS USERS TO QUICKLY SAVE THEIR FAVORITE MOMENTS FROM NETFLIX SERIES AND FILMS TO EITHER REWATCH OR SHARE ON SOCIAL PLATFORMS.

Posed to all Netflix subscribers.



WHEN YOU ARE WATCHING TV, APPROXIMATELY WHAT PERCENTAGE OF THE TIME ARE YOU ALSO LOOKING AT SOMETHING ON YOUR SMARTPHONE?

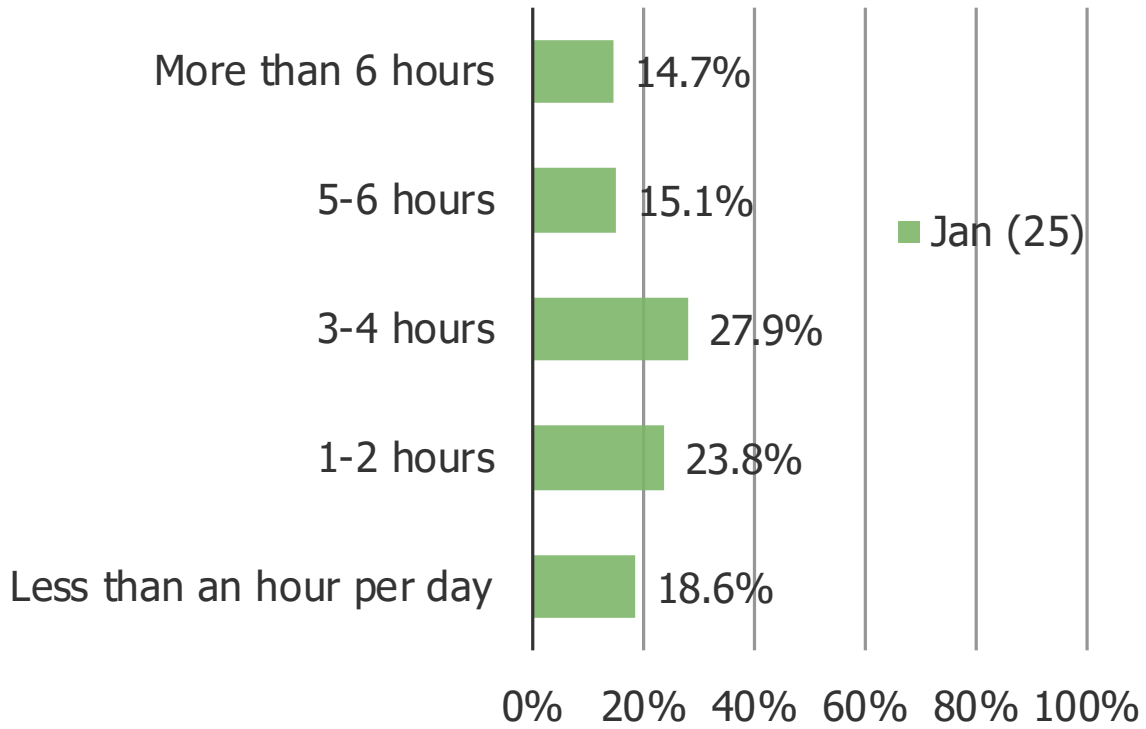
Posed to all respondents.





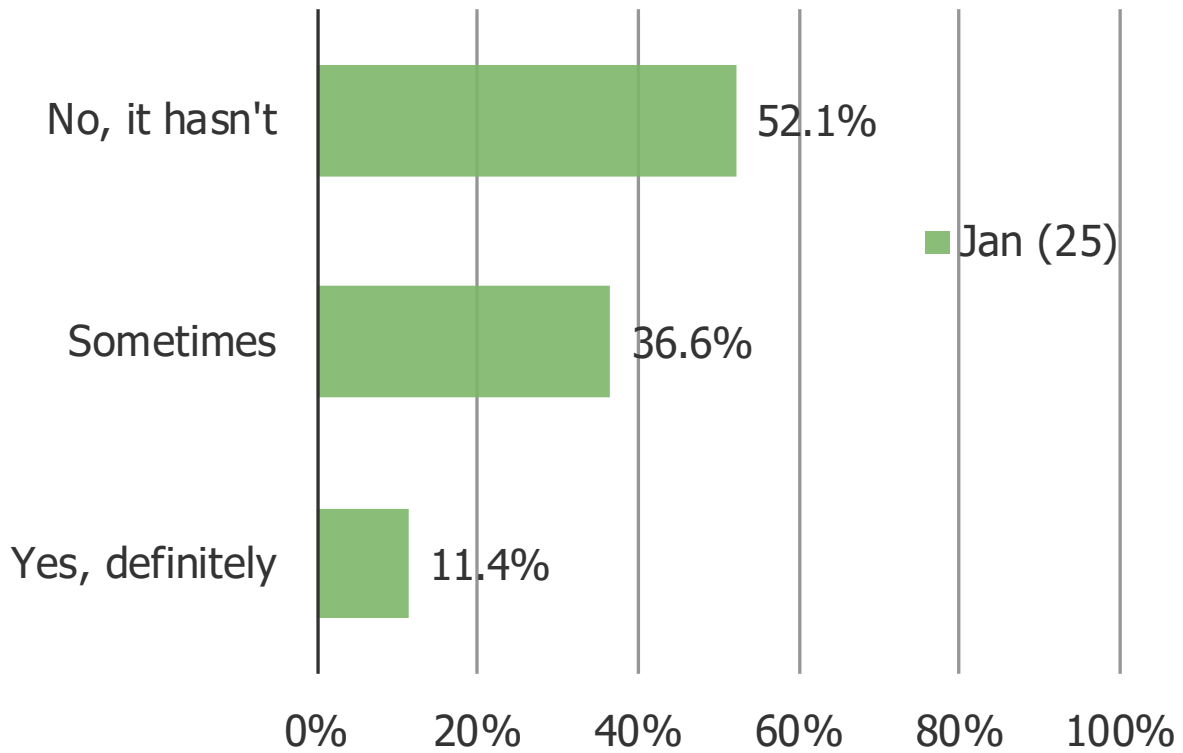
DO YOU HAVE A SENSE FOR HOW MUCH TIME PER DAY YOU SPEND ON YOUR PHONE? IE - YOUR AVERAGE SCREEN TIME PER DAY...

Posed to all respondents.



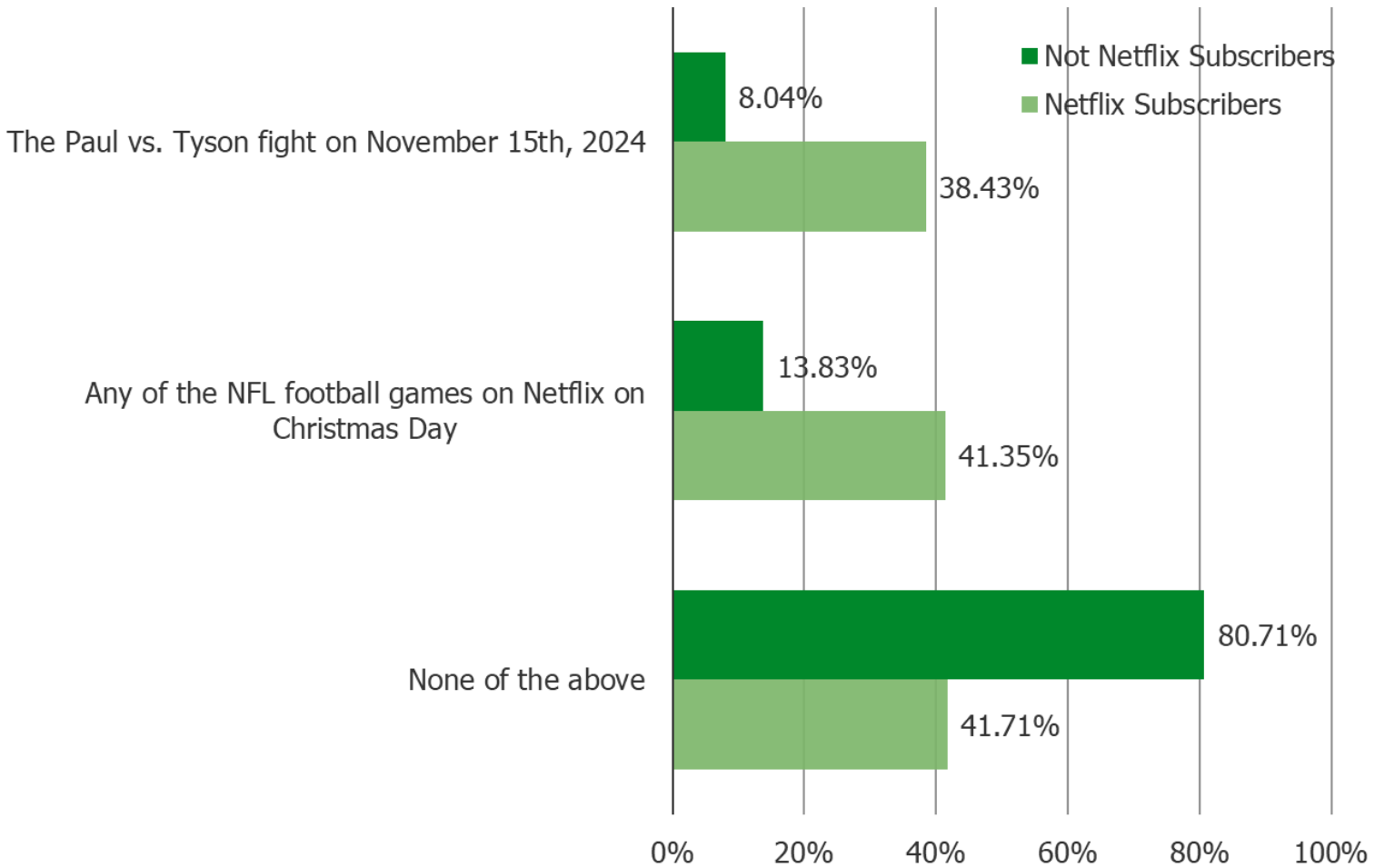
IN YOUR OPINION, HAS THE CONTENT YOU WATCH ON YOUR PHONE DIMINISHED THE IMPORTANCE OF WHAT YOU ARE WATCHING ON TV?

Posed to all respondents.



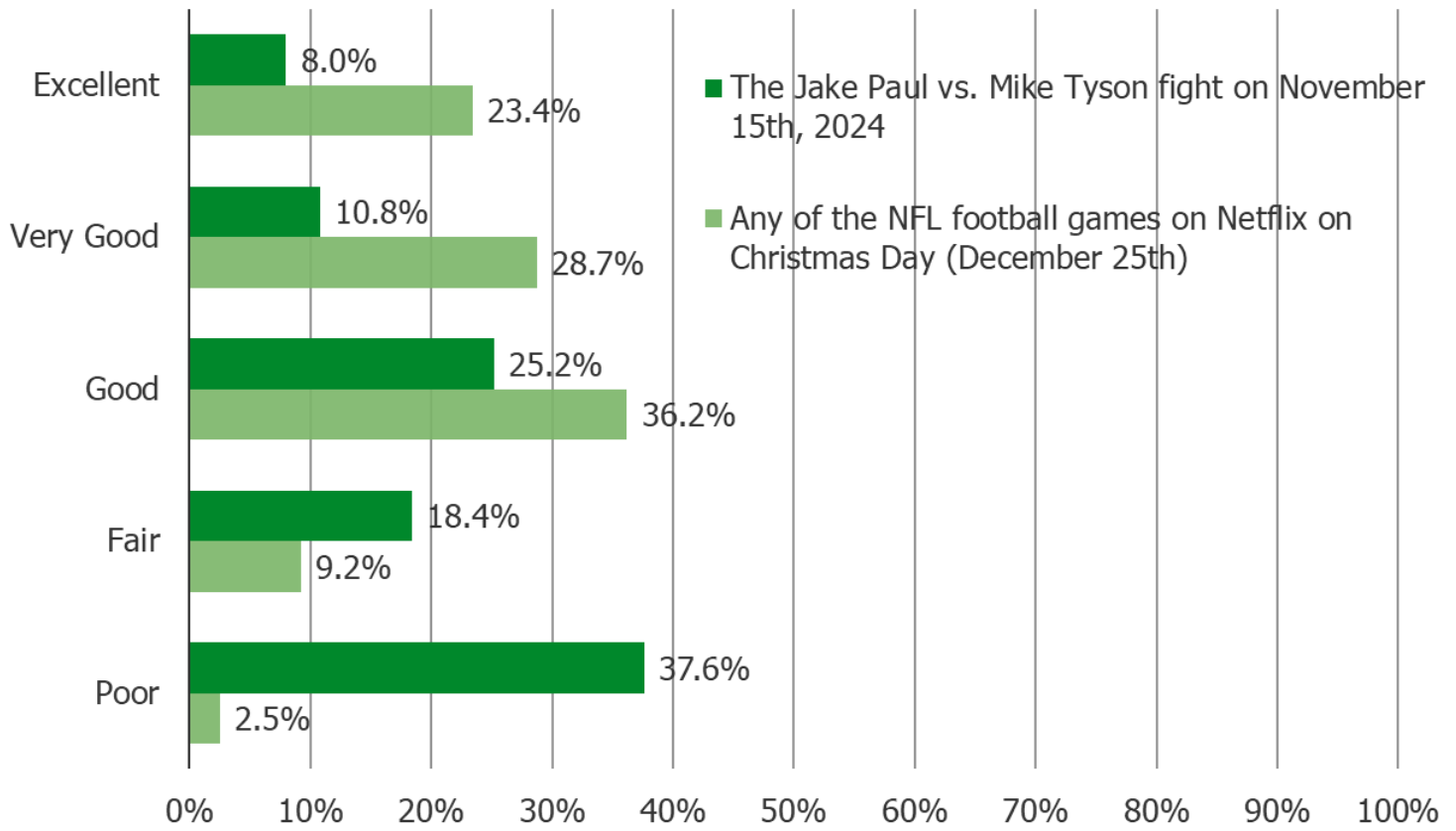
DID YOU WATCH EITHER OF THE FOLLOWING ON NETFLIX? SELECT ALL THAT APPLY

Posed to all respondents.



HOW WOULD YOU RATE THE VIEWING EXPERIENCE OF WATCHING THE FOLLOWING ON NETFLIX?

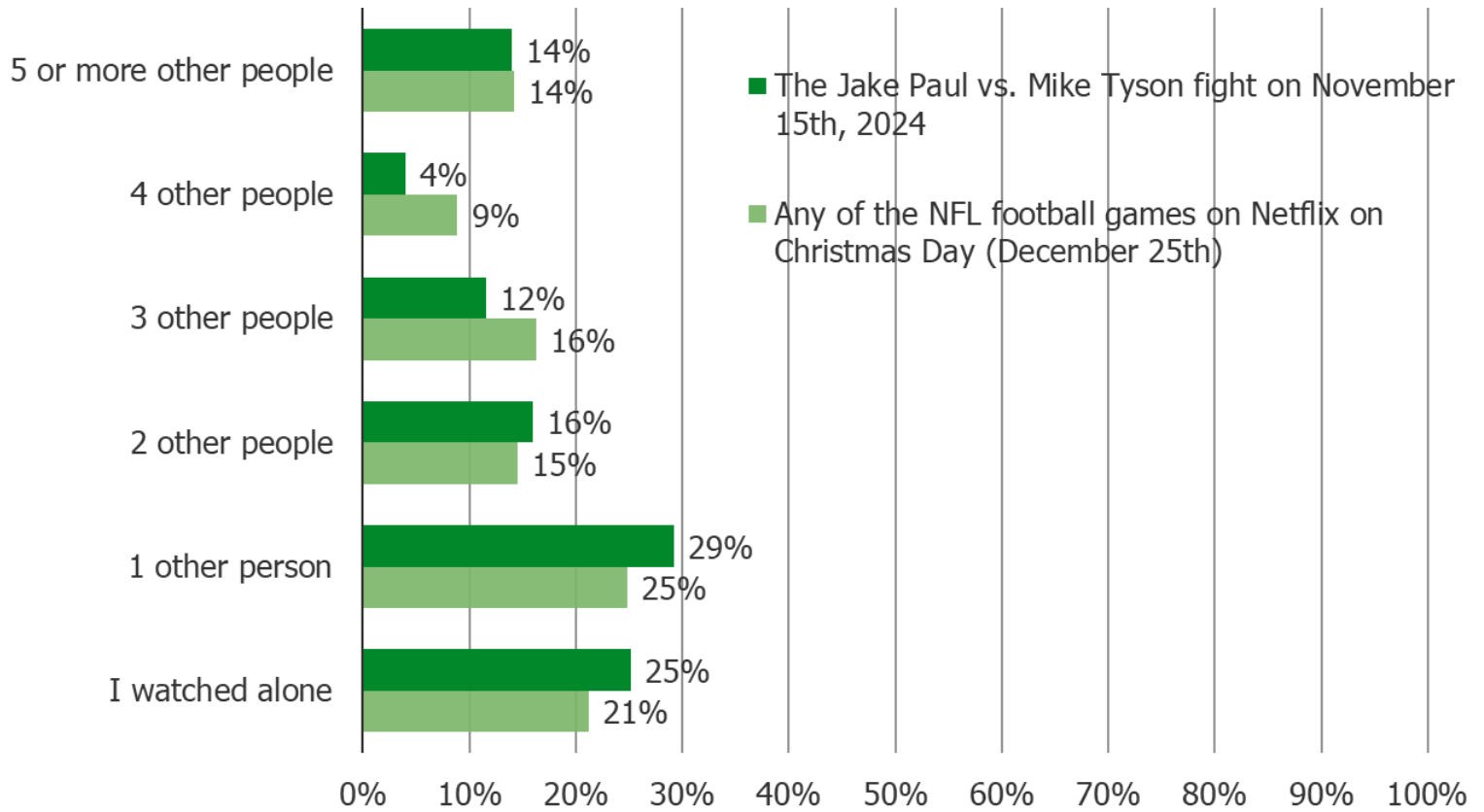
Posed to all respondents who watched the below.



|   |     |
|---|-----|
|   | N = |
| Any of the NFL football games on Netflix on Christmas Day (December 25th) | 282 |
| The Jake Paul vs. Mike Tyson fight on November 15th, 2024                 | 250 |

HOW MANY PEOPLE IN YOUR HOUSEHOLD WATCHED THE EVENT(S) WITH YOU?

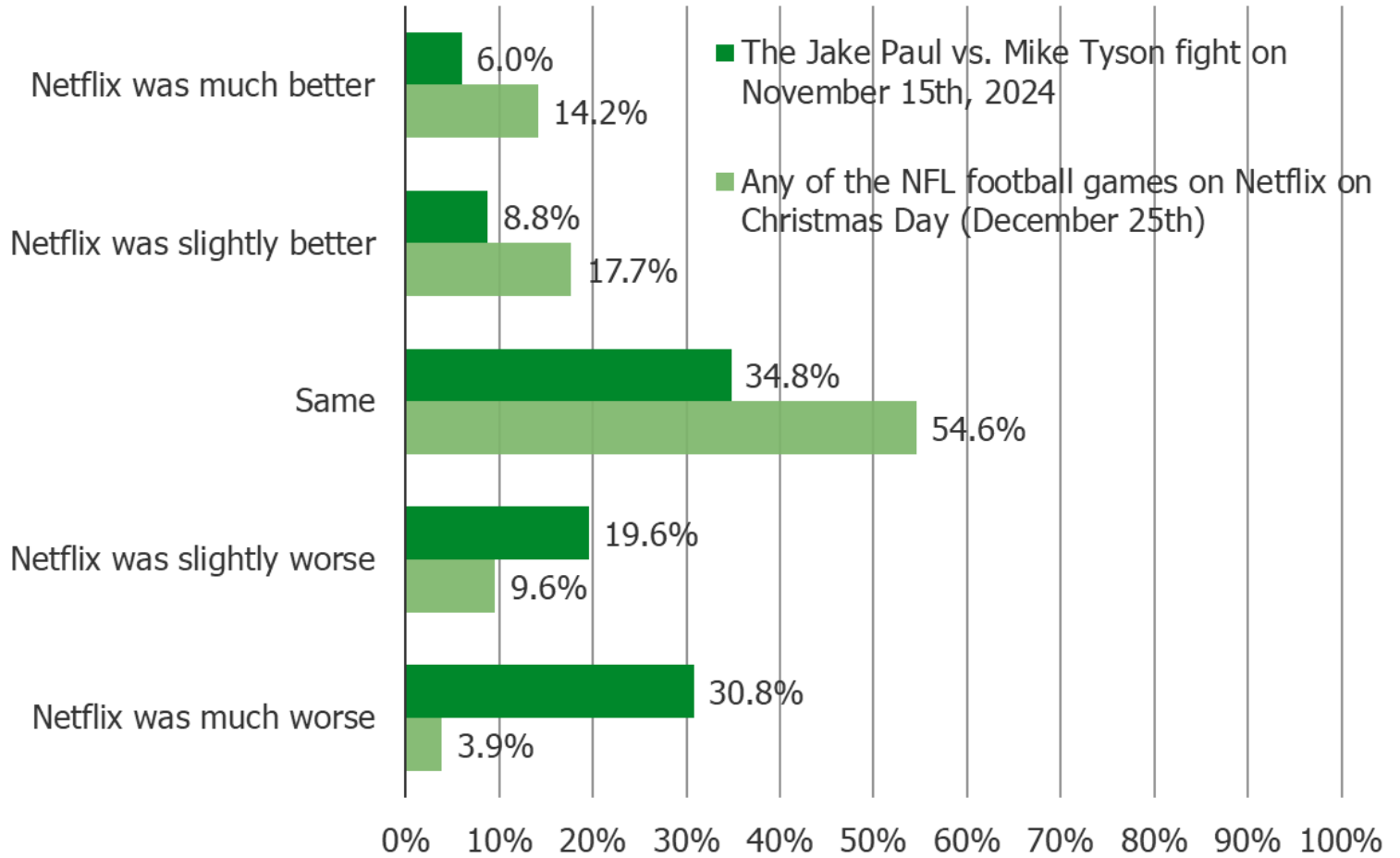
Posed to all respondents who watched the below.



|   |     |
|---|-----|
|   | N = |
| Any of the NFL football games on Netflix on Christmas Day (December 25th) | 282 |
| The Jake Paul vs. Mike Tyson fight on November 15th, 2024                 | 250 |

COMPARED TO CABLE TV OR OTHER PLATFORMS THAT STREAM LIVE SPORTS (ESPN, AMAZON PRIME, YOUTUBE TV, HULU, ETC) HOW DID NETFLIX'S STREAMING QUALITY COMPARE?

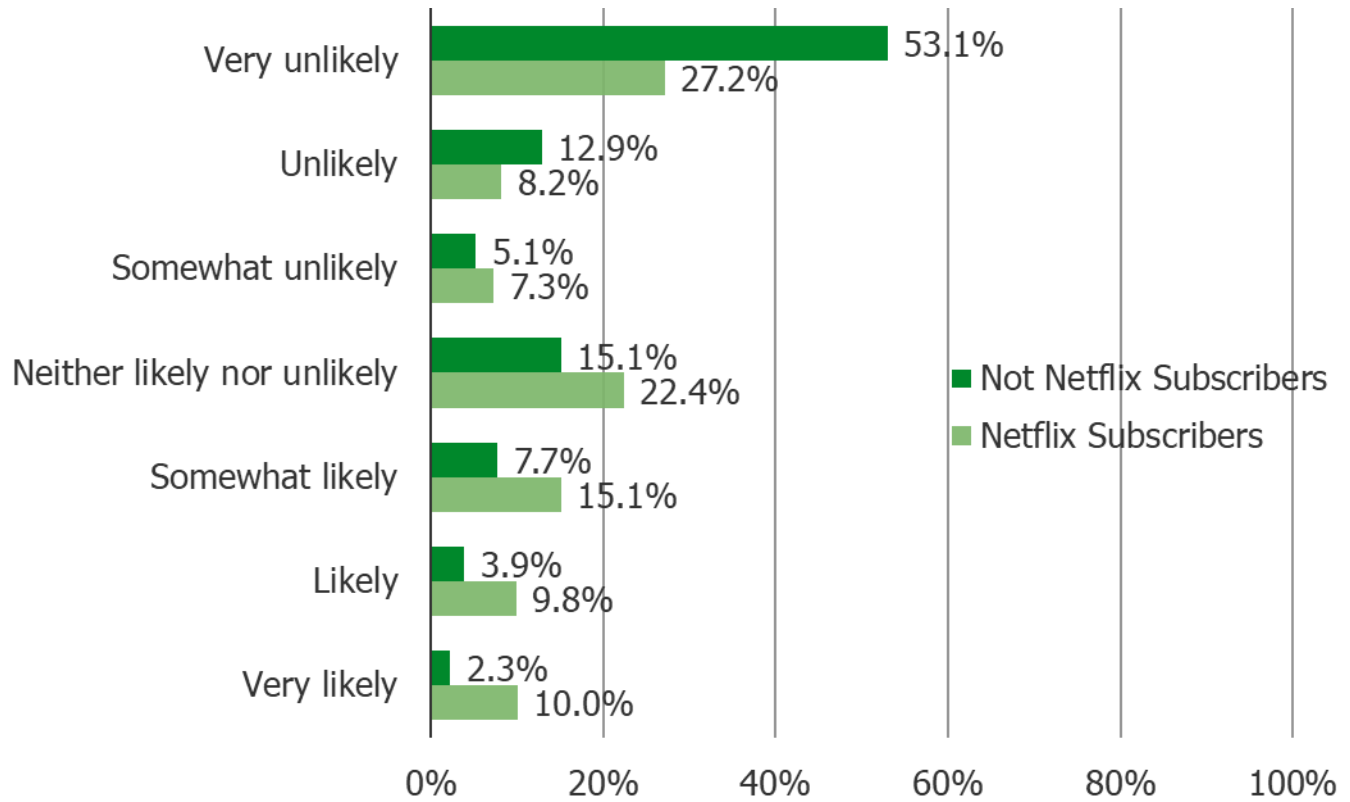
Posed to all respondents who watched the below.



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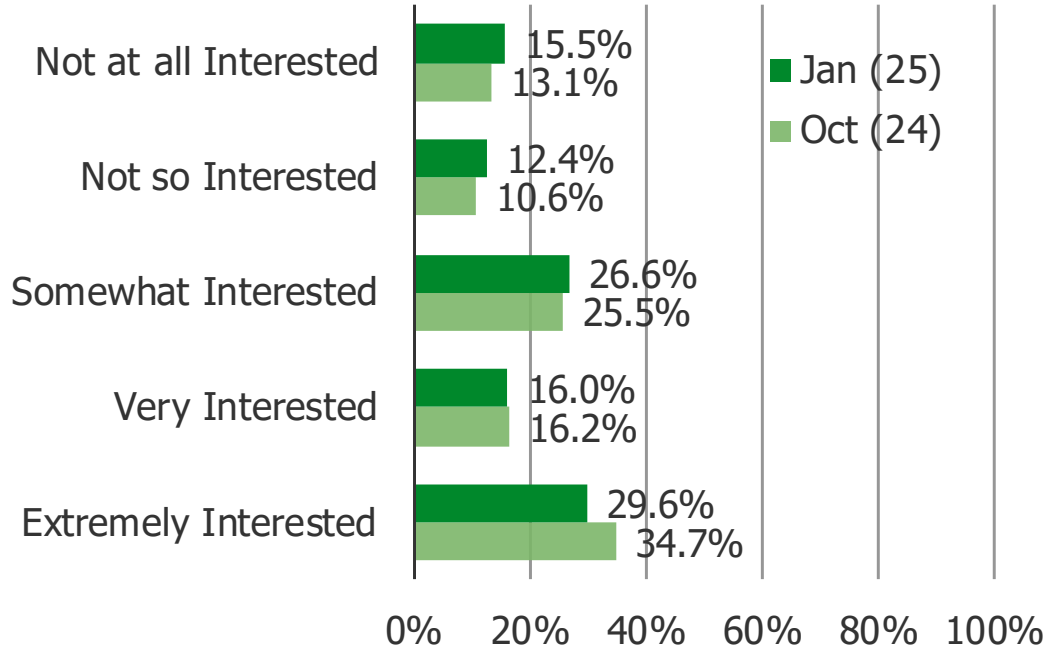
IF NETFLIX WERE TO OFFER A PREMIUM TIER FOR LIVE SPORTS AND EVENTS, HOW LIKELY WOULD YOU BE TO SUBSCRIBE?

Posed to all respondents.

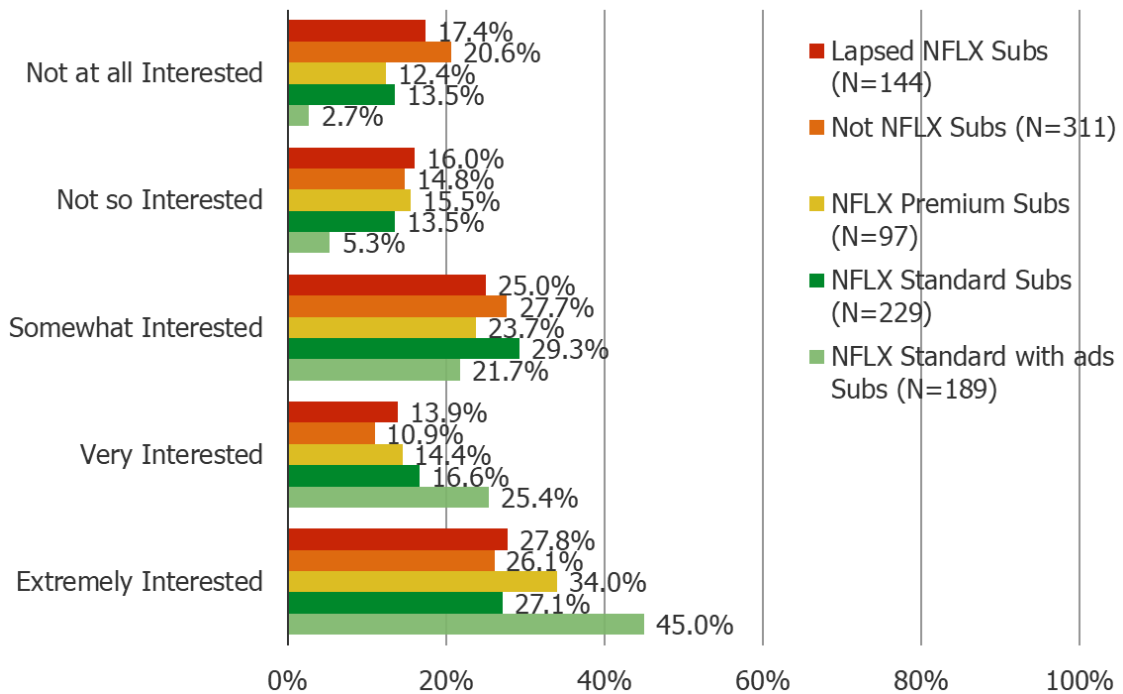


HOW MUCH INTEREST WOULD YOU HAVE IN A FREE VERSION OF NETFLIX WITH ADS?

Posed to all respondents.



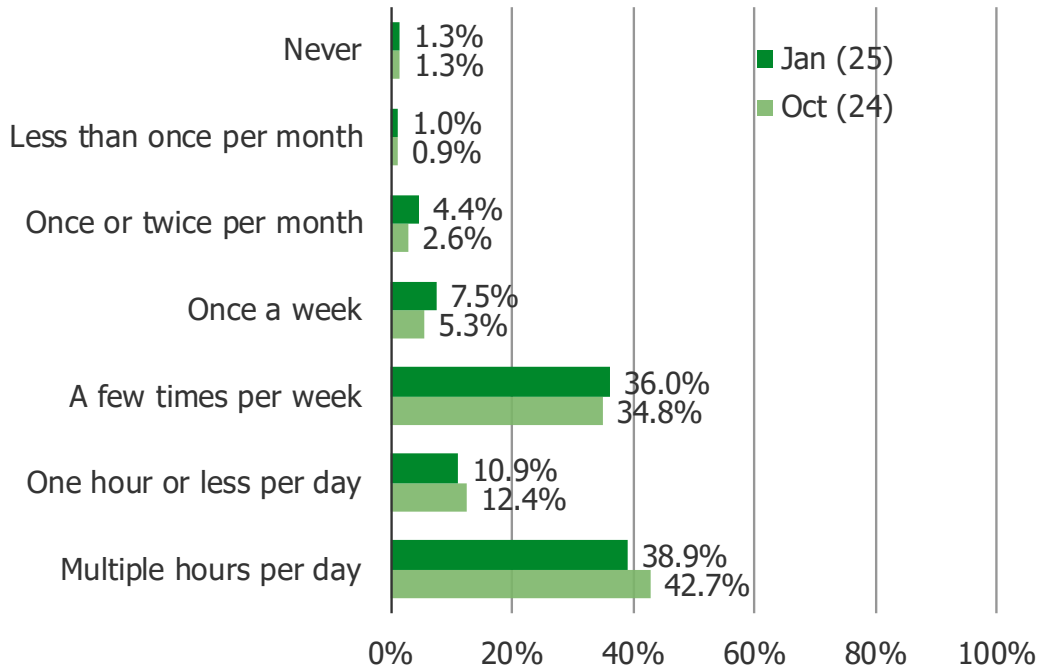
Cross-Tabbing the chart above...



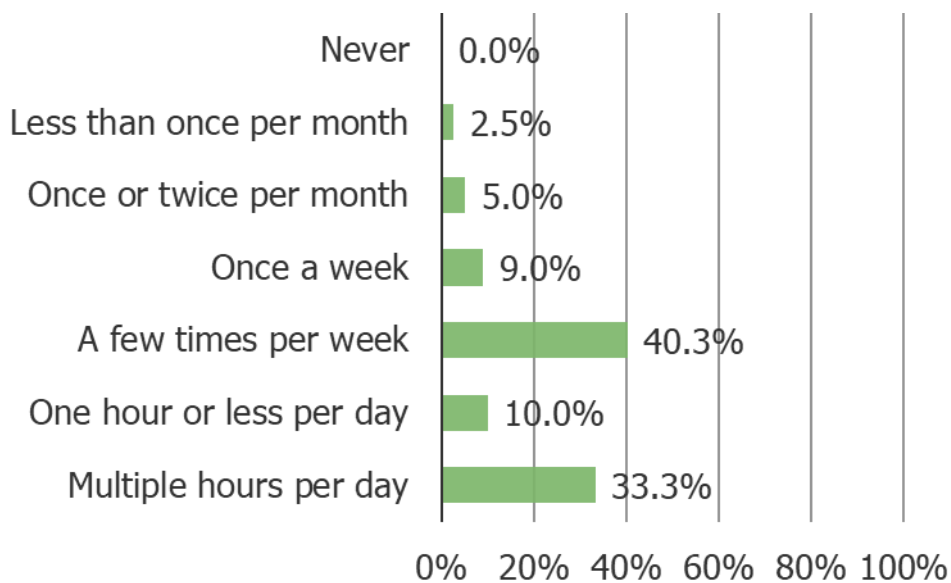


IF THERE WAS A FREE VERSION OF NETFLIX WITH ADS, HOW OFTEN DO YOU THINK YOU WOULD WATCH IT?

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

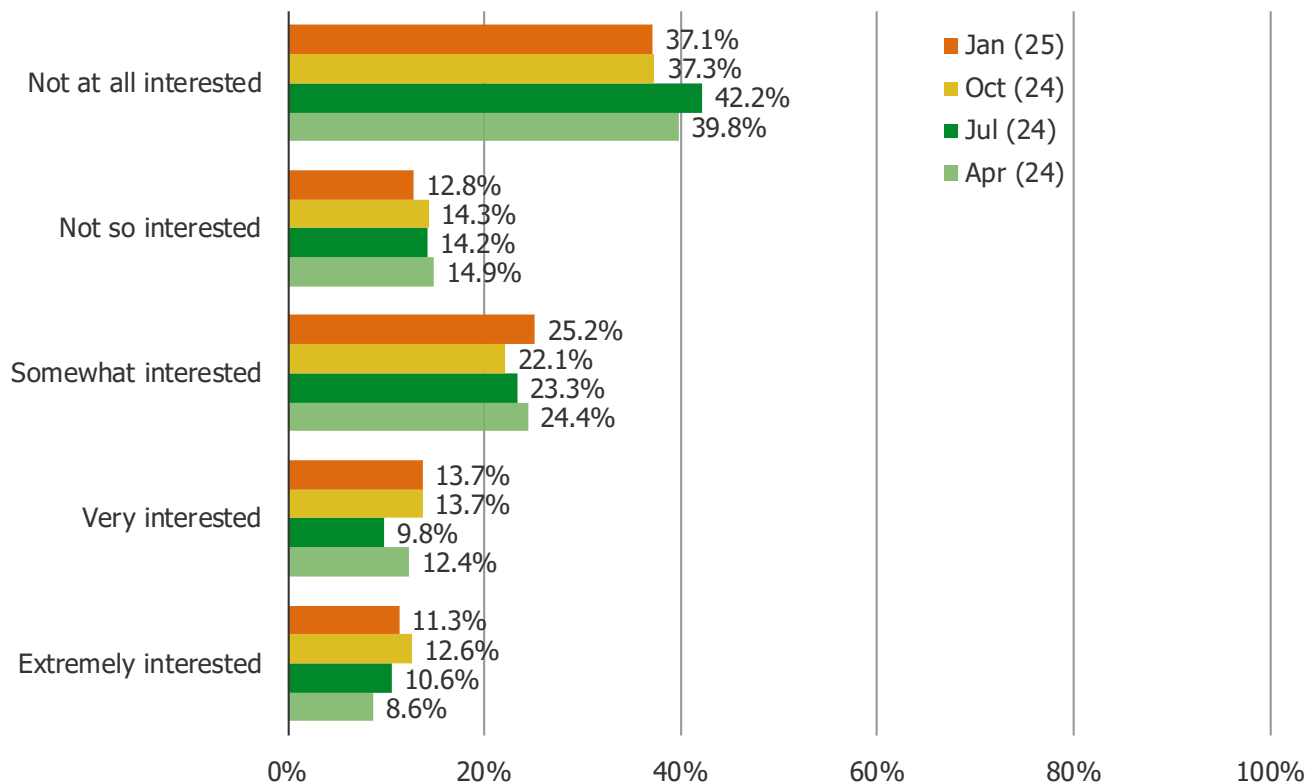


Cross-Tabbing the chart above... respondents who are not Netflix subscribers and are at least somewhat interested in a free version of Netflix with ads (N = 201)



### HOW MUCH INTEREST WOULD YOU HAVE IN WATCHING LIVE SPORTS STREAMED ON NETFLIX?

Posed to all respondents.

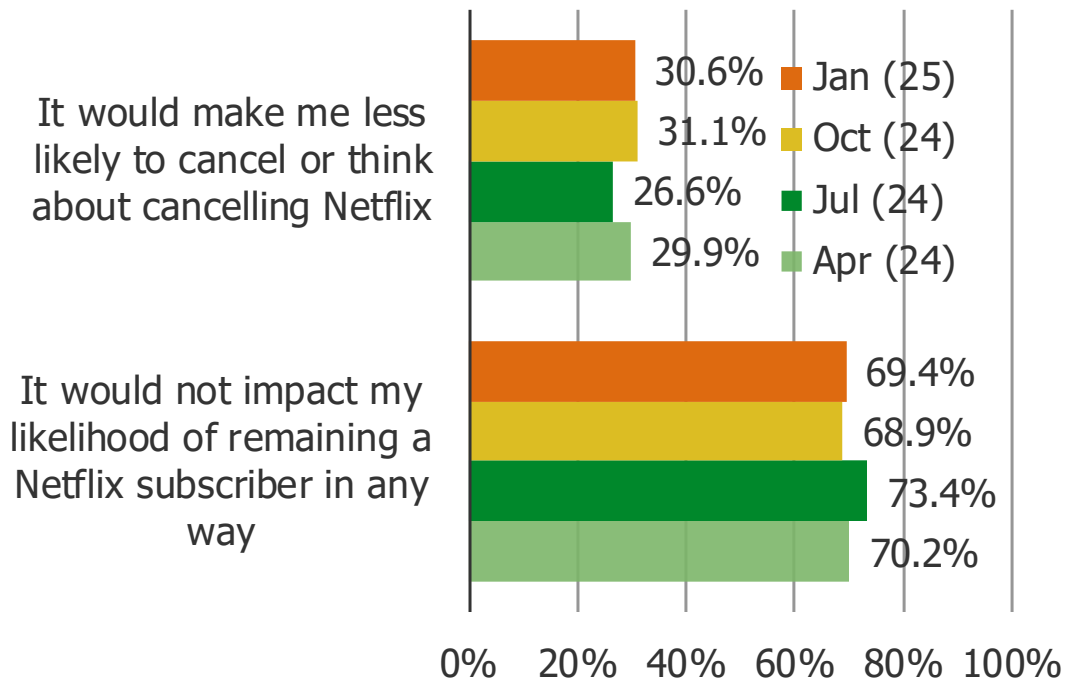


Why?



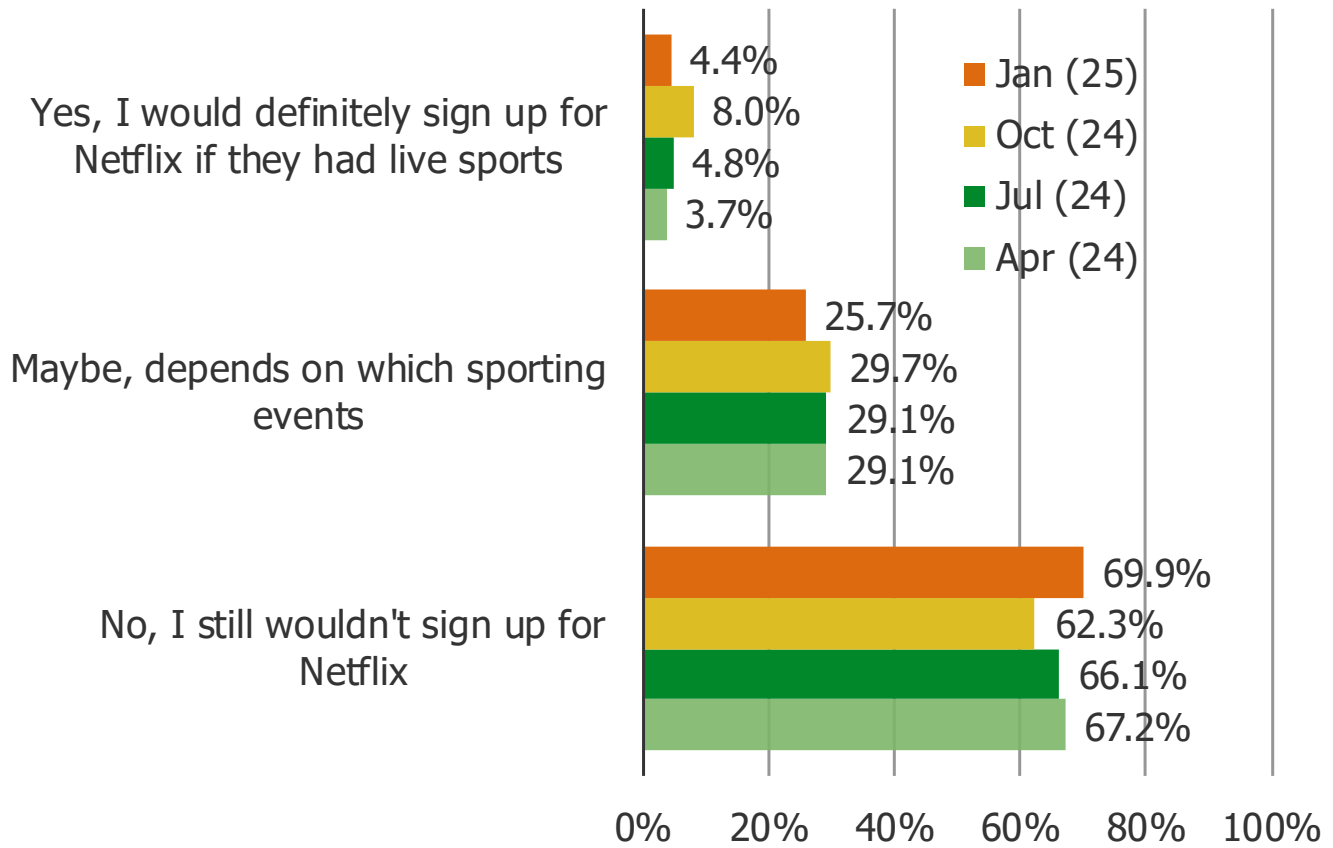
YOU MENTIONED YOU ARE A NETFLIX SUBSCRIBER. IF NETFLIX STARTED OFFERING MORE LIVE SPORTS EVENTS ON NETFLIX, WHICH BEST DESCRIBES YOU...

Posed to respondents who are Netflix subscribers.



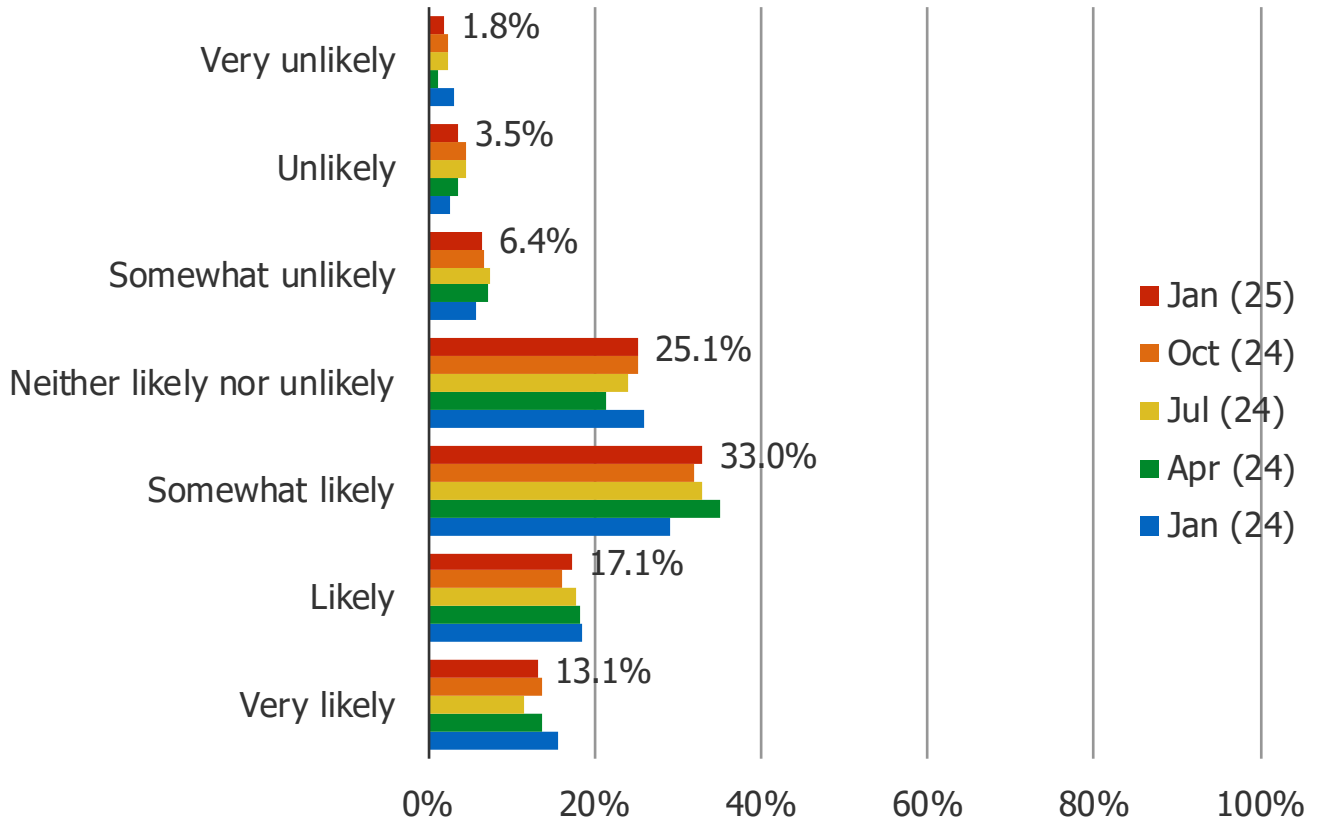
YOU MENTIONED THAT YOU ARE NOT A NETFLIX SUBSCRIBER. IF NETFLIX STARTED OFFERING MORE LIVE SPORTING EVENTS AS PART OF THEIR SUBSCRIPTION, WOULD THAT COMPEL YOU TO SIGN UP FOR NETFLIX?

Posed to respondents who are NOT Netflix subscribers.



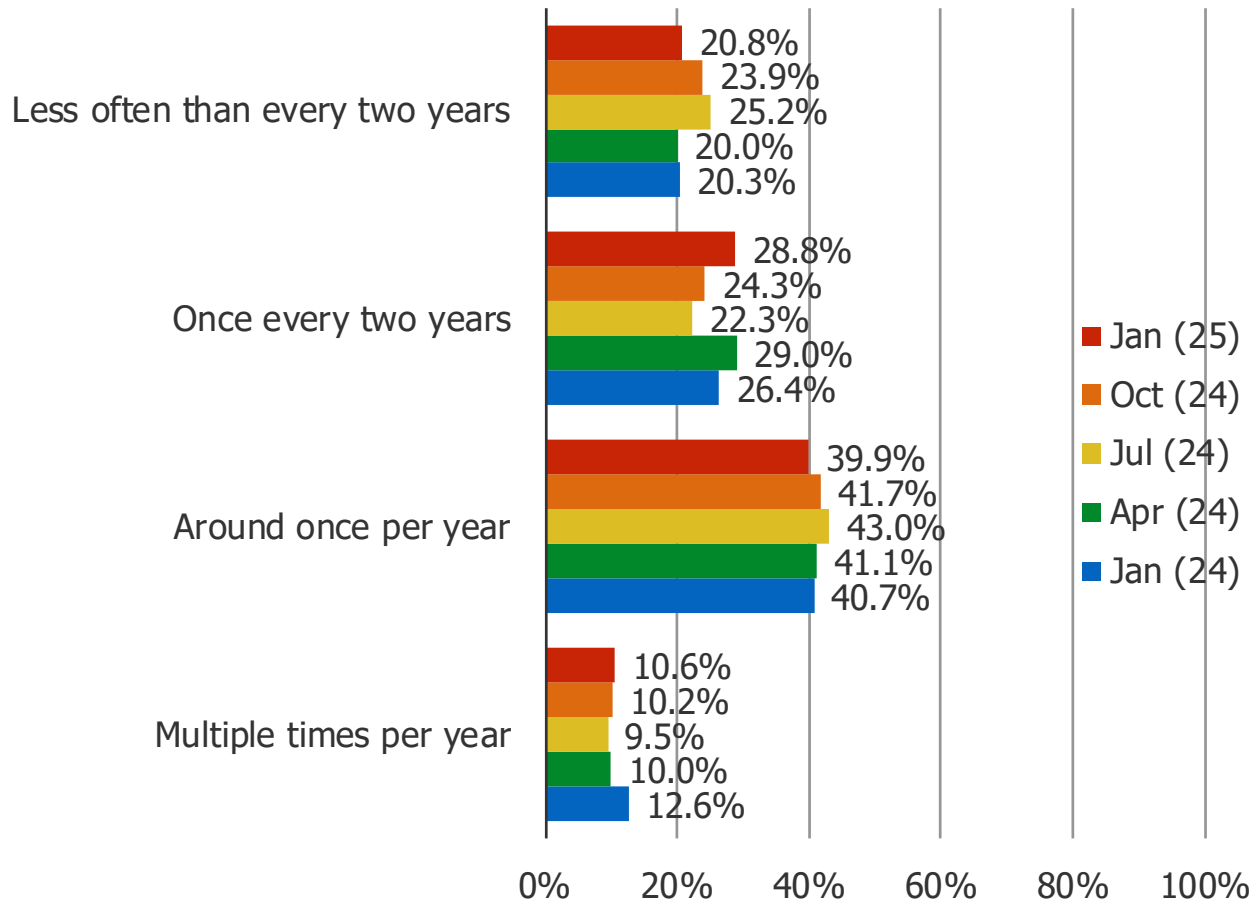
HOW LIKELY DO YOU THINK IT IS THAT NETFLIX WILL INCREASE PRICES IN THE NEXT THREE MONTHS?

Posed to Netflix subscribers.



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

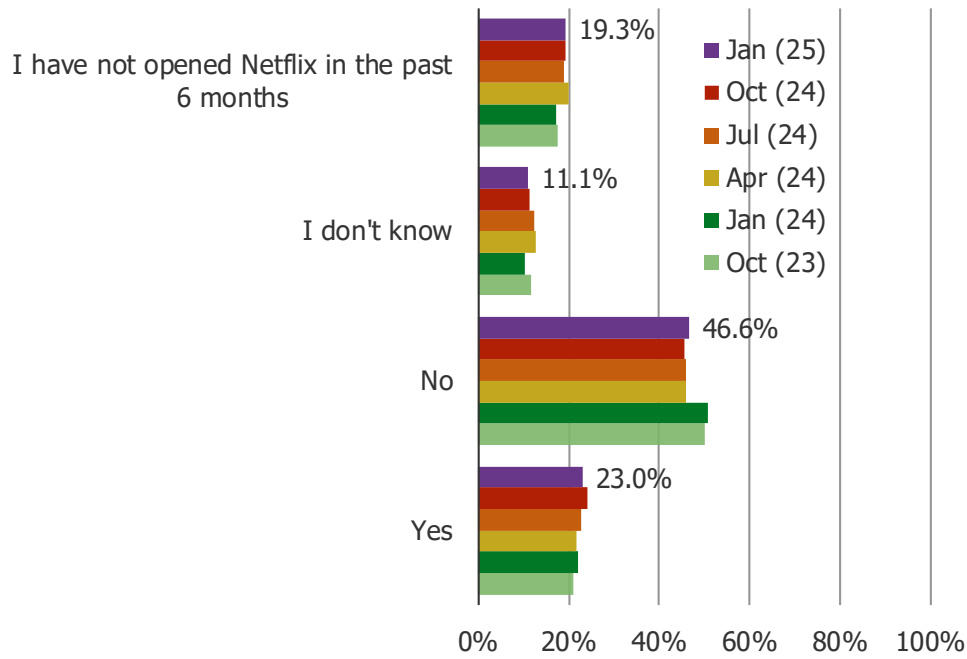
Posed to Netflix subscribers.



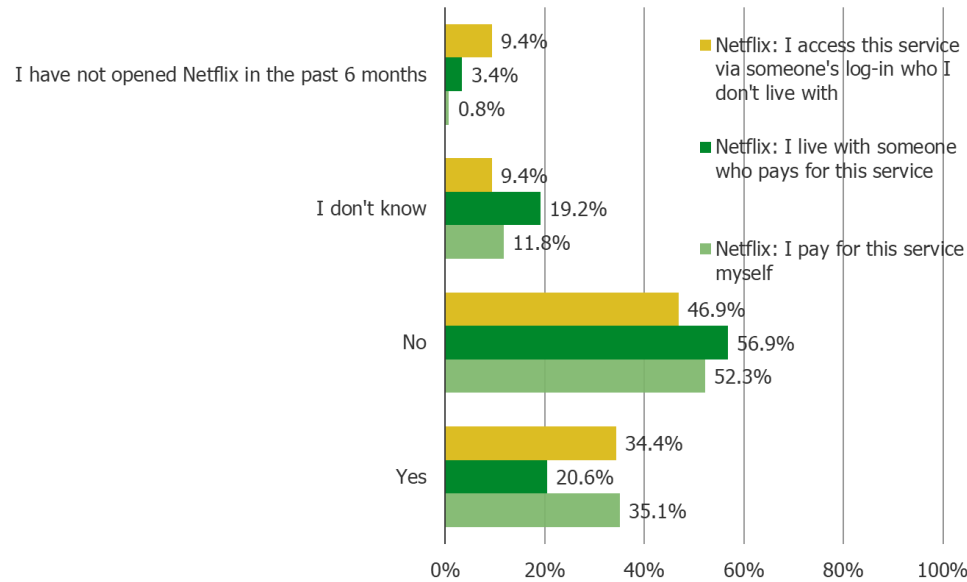
## RE-AUTHENTICATING NETFLIX

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...



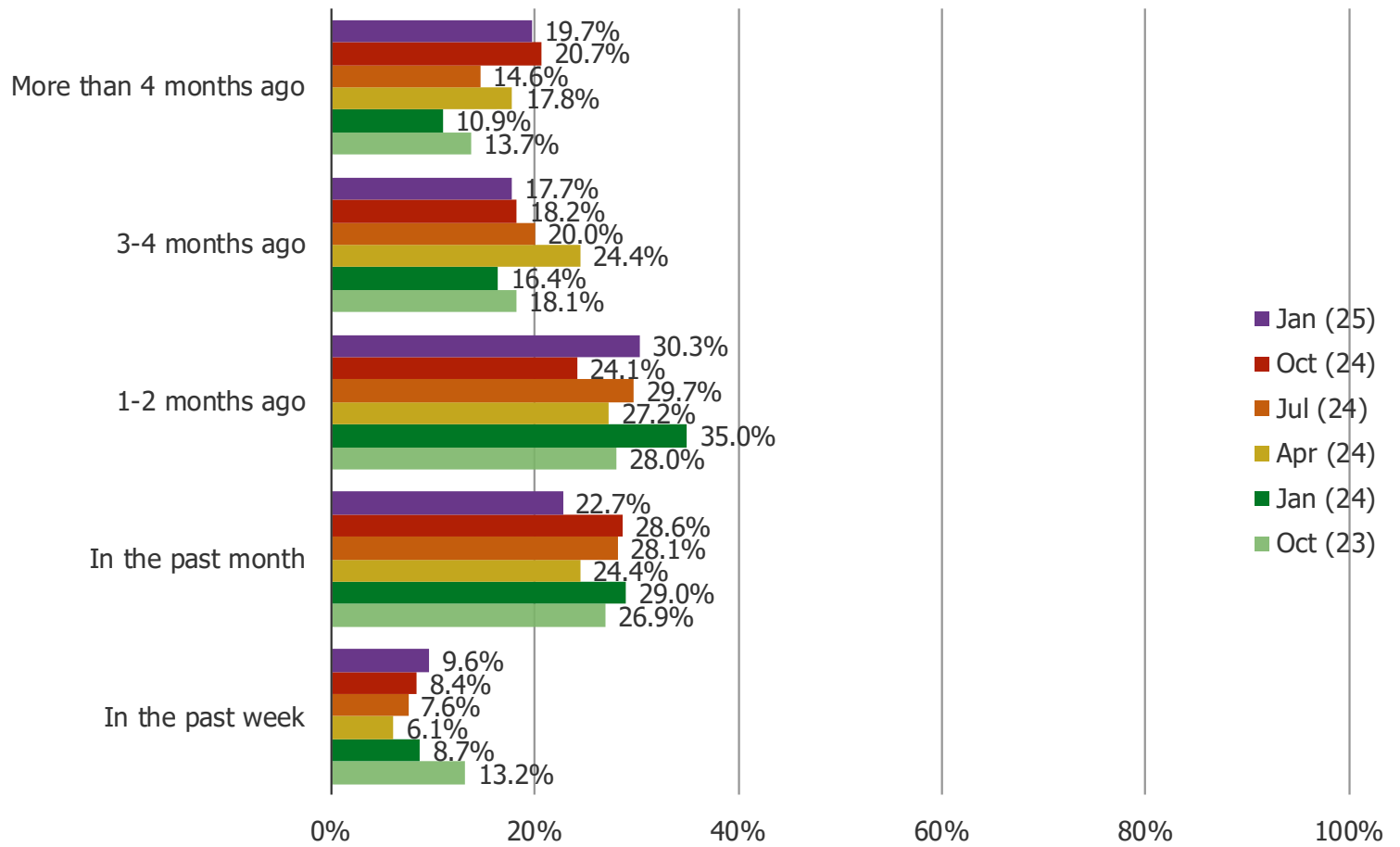
Posed to respondents who watch Netflix, cross-tabbed by how they access Netflix...





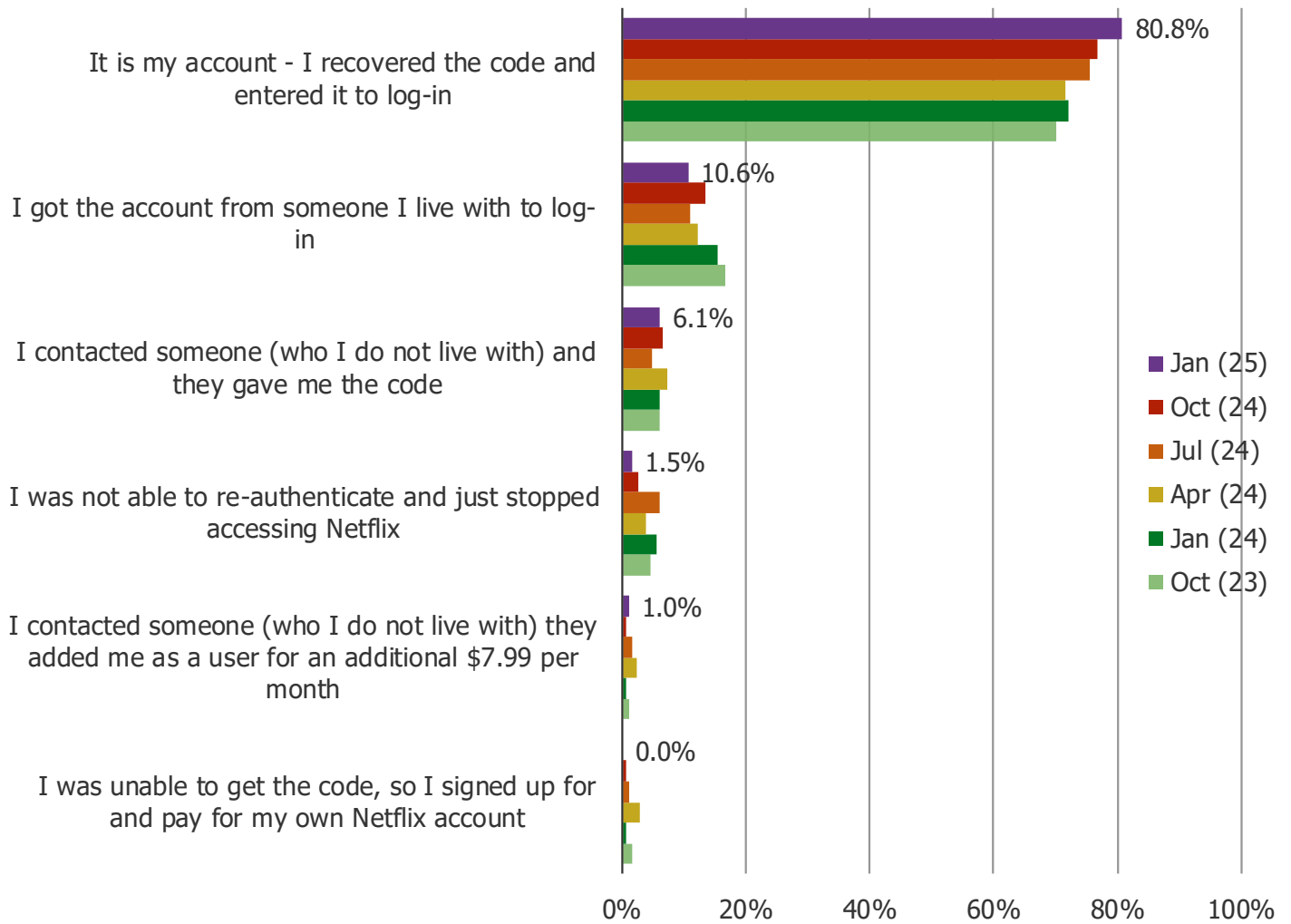
WHEN WERE YOU MOST RECENTLY FORCED TO RE-AUTHENTICATE TO GET INTO NETFLIX?

Posed to respondents who were asked to re-authenticate to access Netflix (N = 198).



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 = 198).

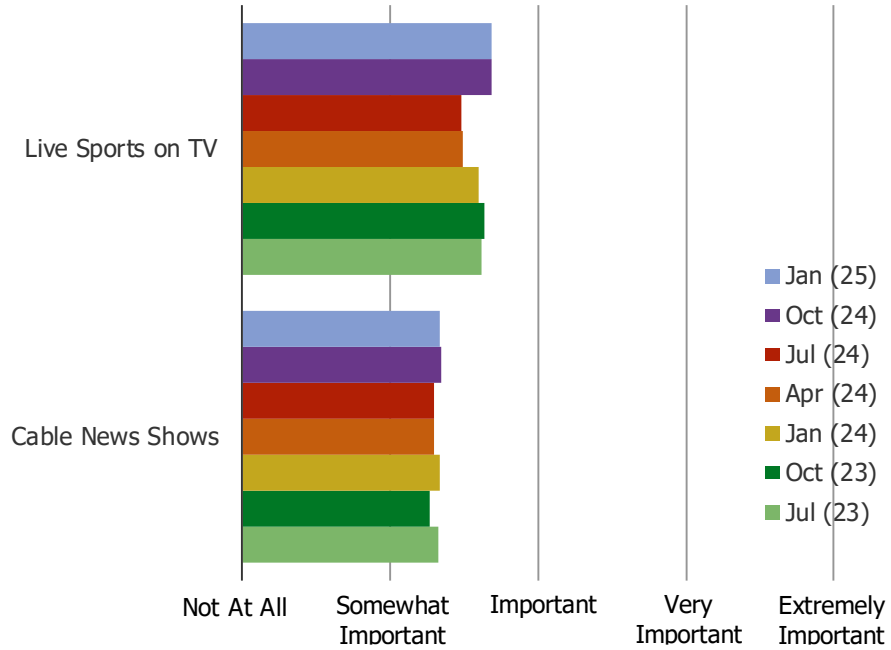


## CABLE TV PERSONALITIES AND LIVE SPORTS/EVENTS

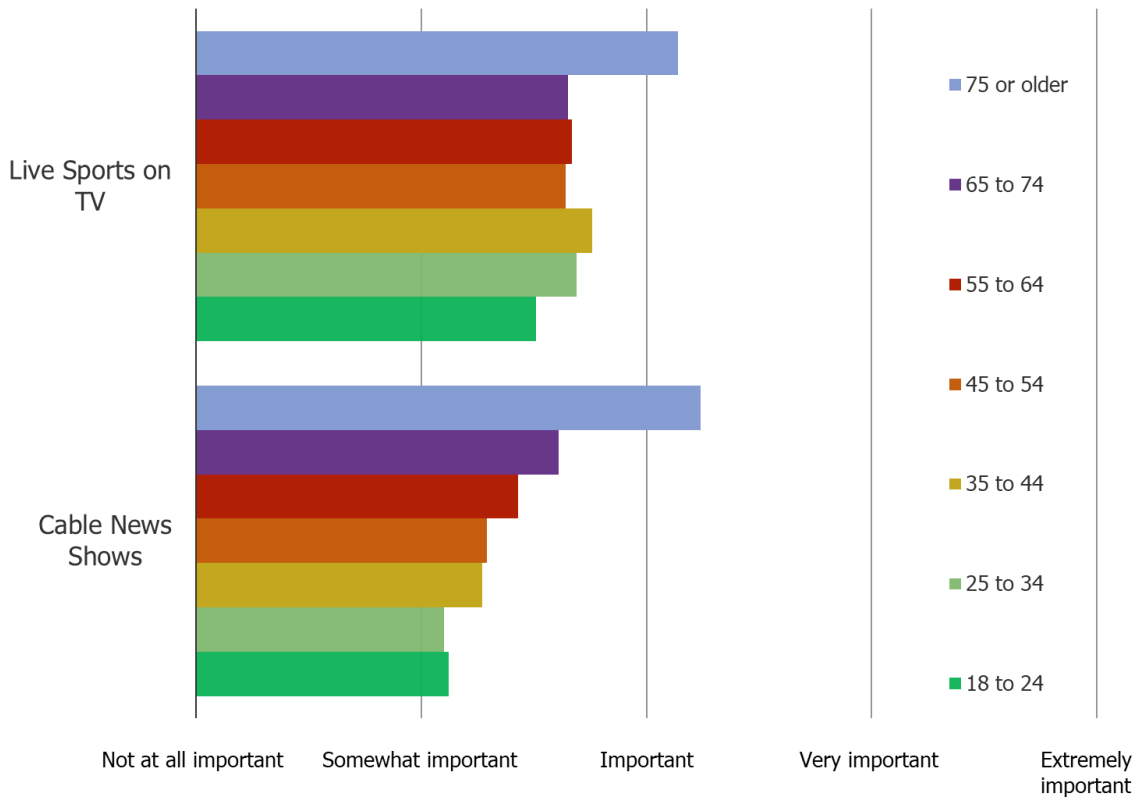


HOW IMPORTANT ARE THE FOLLOWING TO YOU...

Posed to all respondents.



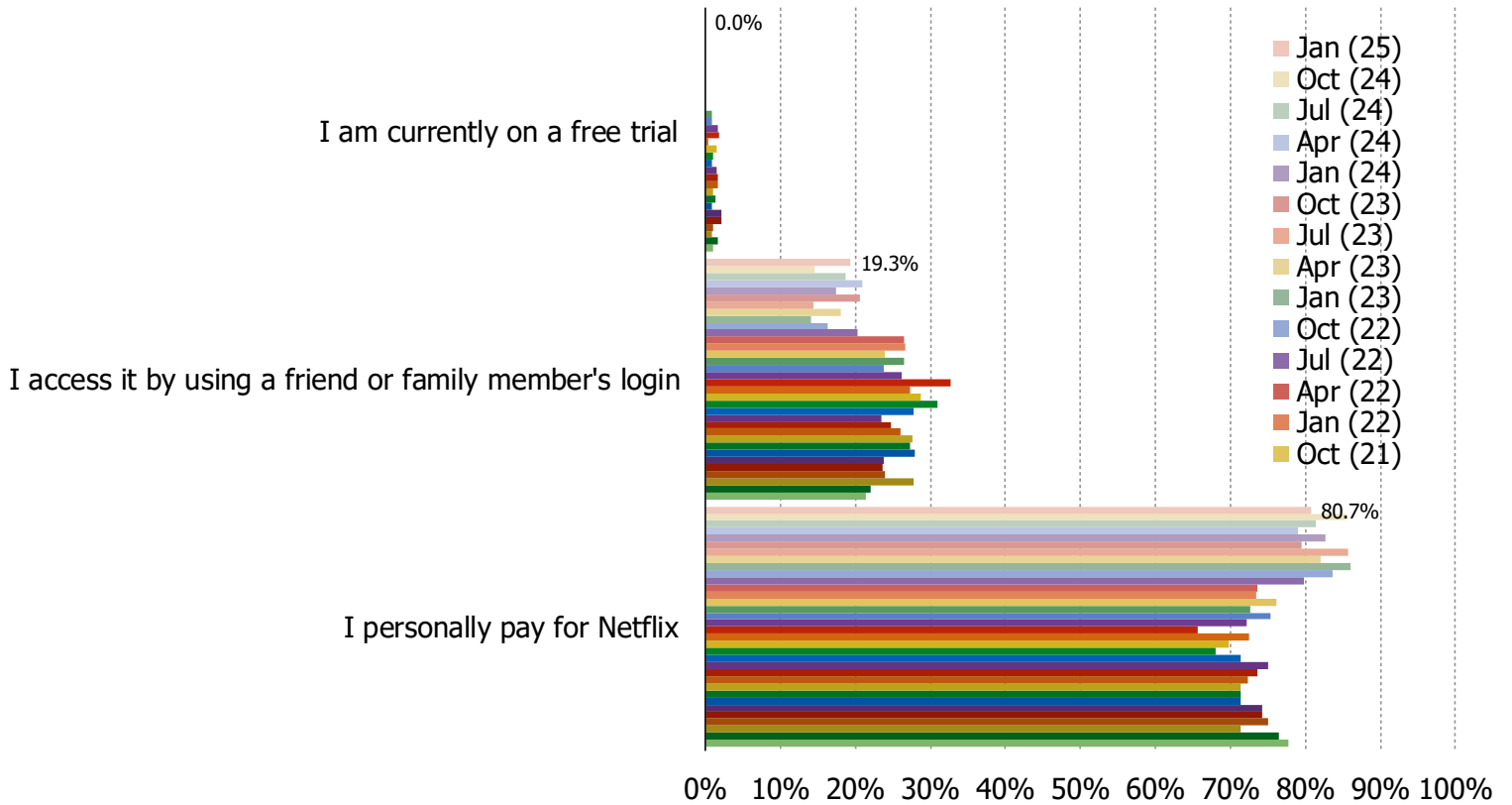
Cross-Tab (Weighted Averages)



# NFLX ACCOUNT SHARING

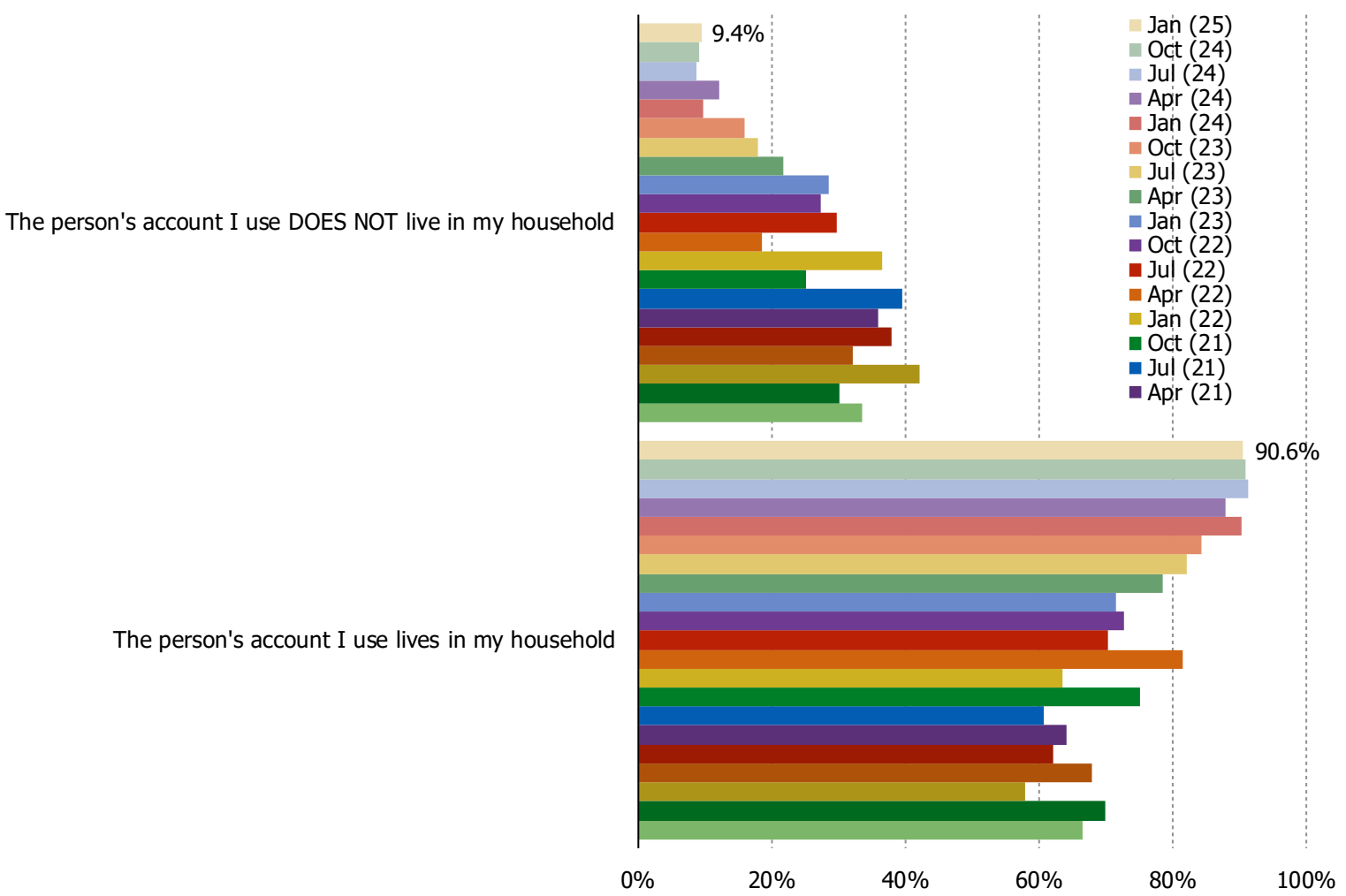
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

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?

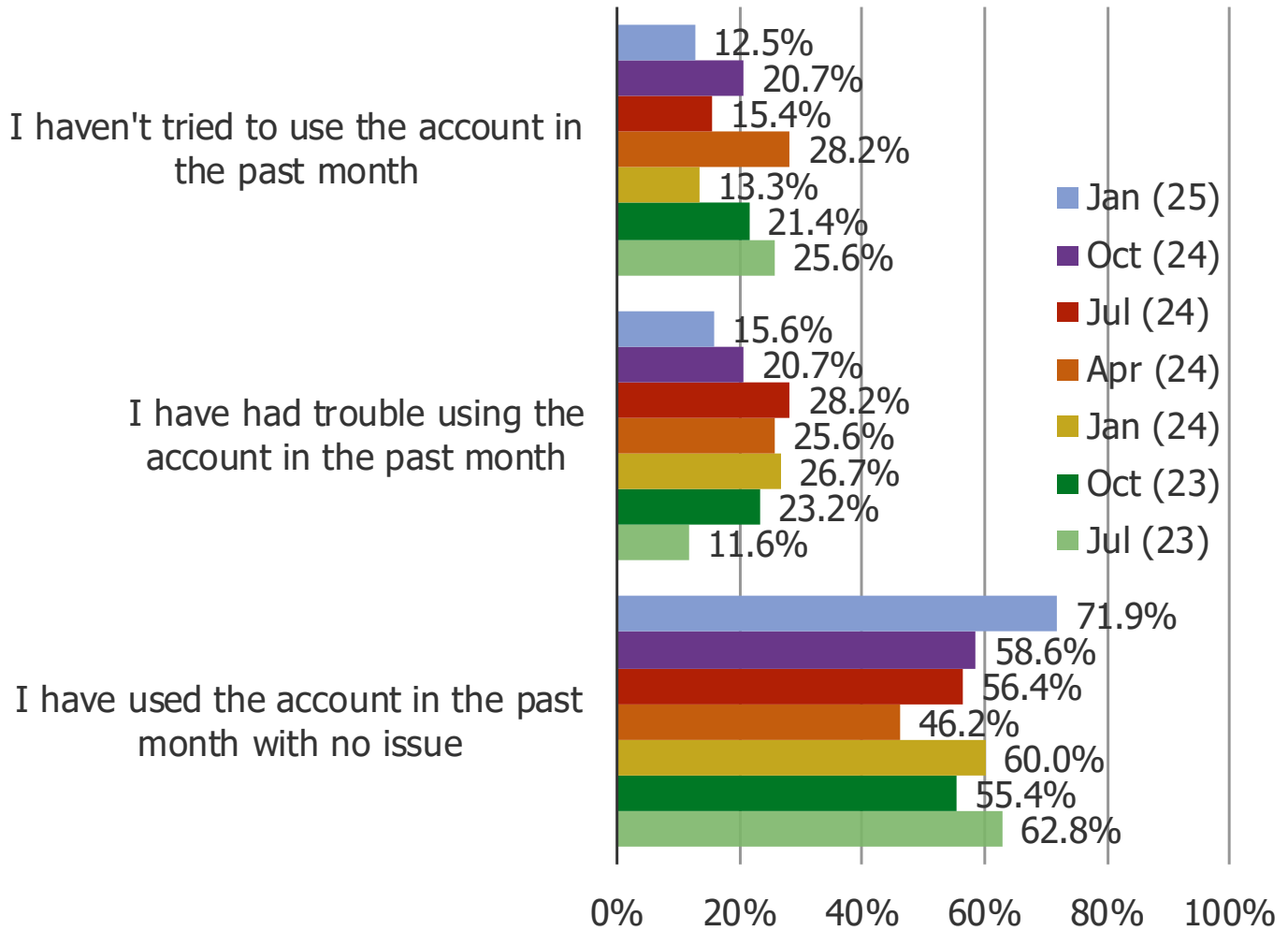
Posed to Netflix subscribers who access it by using a family or friend’s login (31% of subscribers).





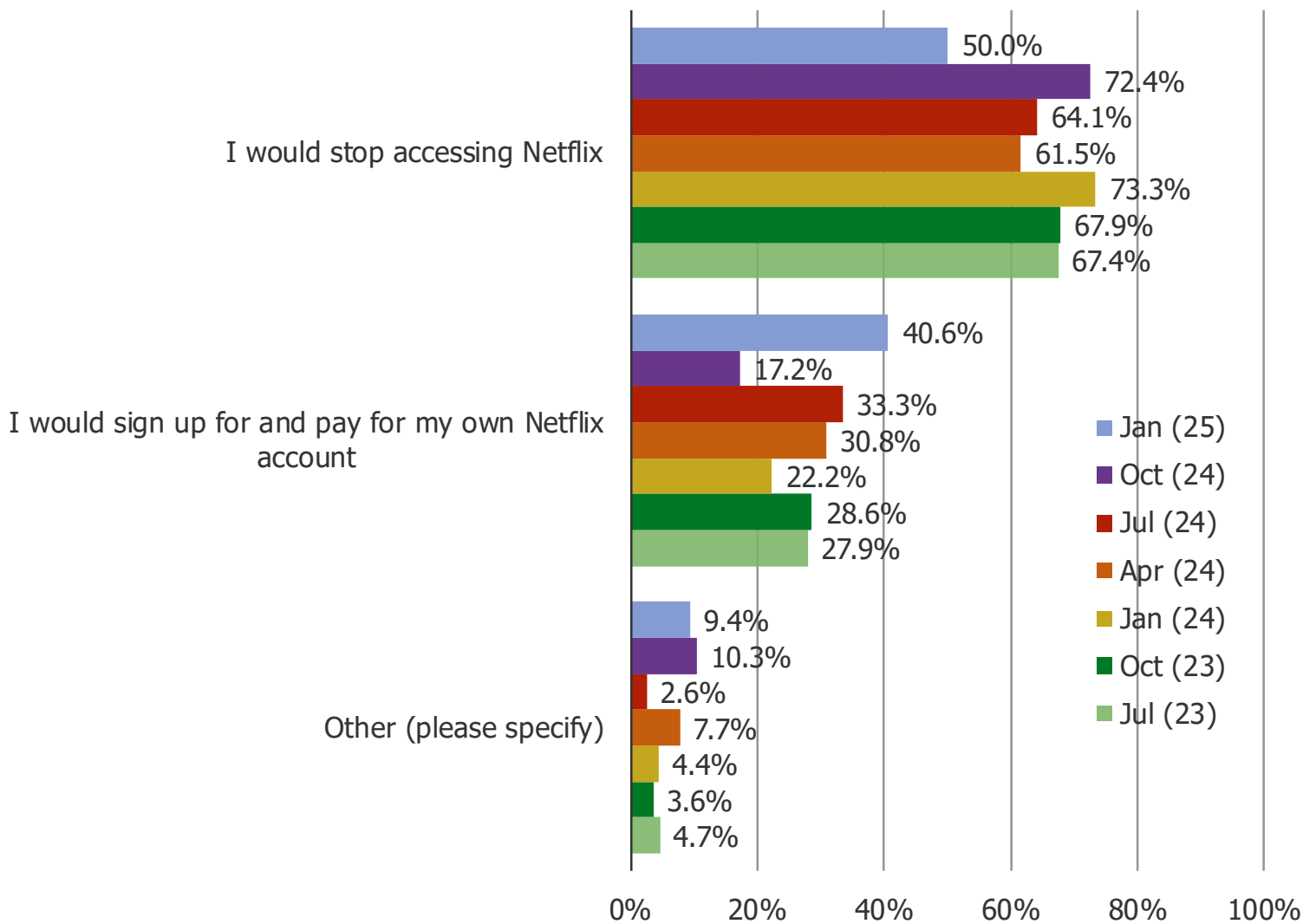
HAVE YOU HAD ANY TROUBLE ACCESSING THE PERSON'S NETFLIX ACCOUNT WHO YOU TYPICALLY USE?

Posed to respondents who said they access someone else's account who they do not live with (N =32)



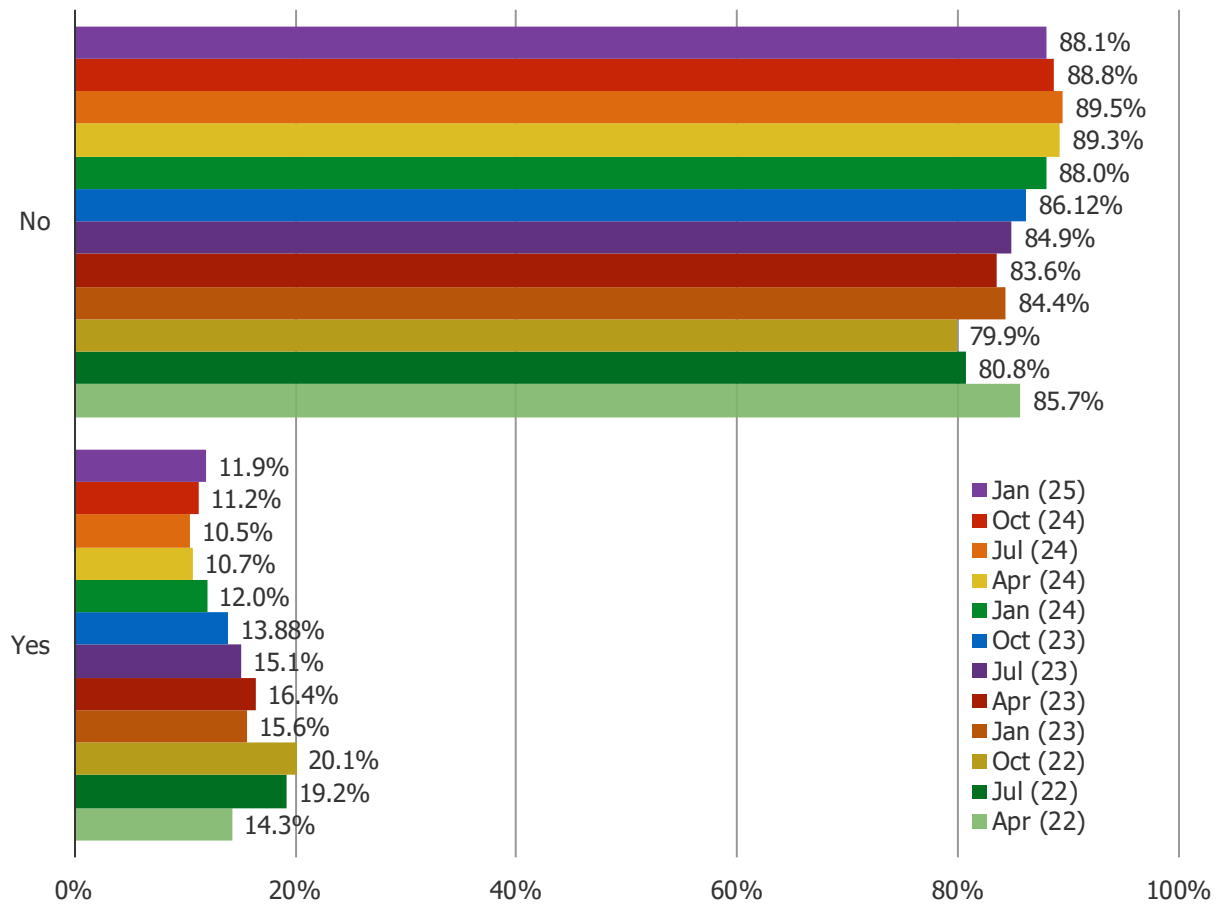
WHICH OF THE FOLLOWING WOULD YOU DO IF NETFLIX NO LONGER ALLOWED THE PERSON WHOSE ACCOUNT YOU ACCESS TO SHARE THEIR NETFLIX ACCOUNT WITH YOU FOR FREE

Posed to respondents who said they access someone else’s account who they do not live with (N = 32)



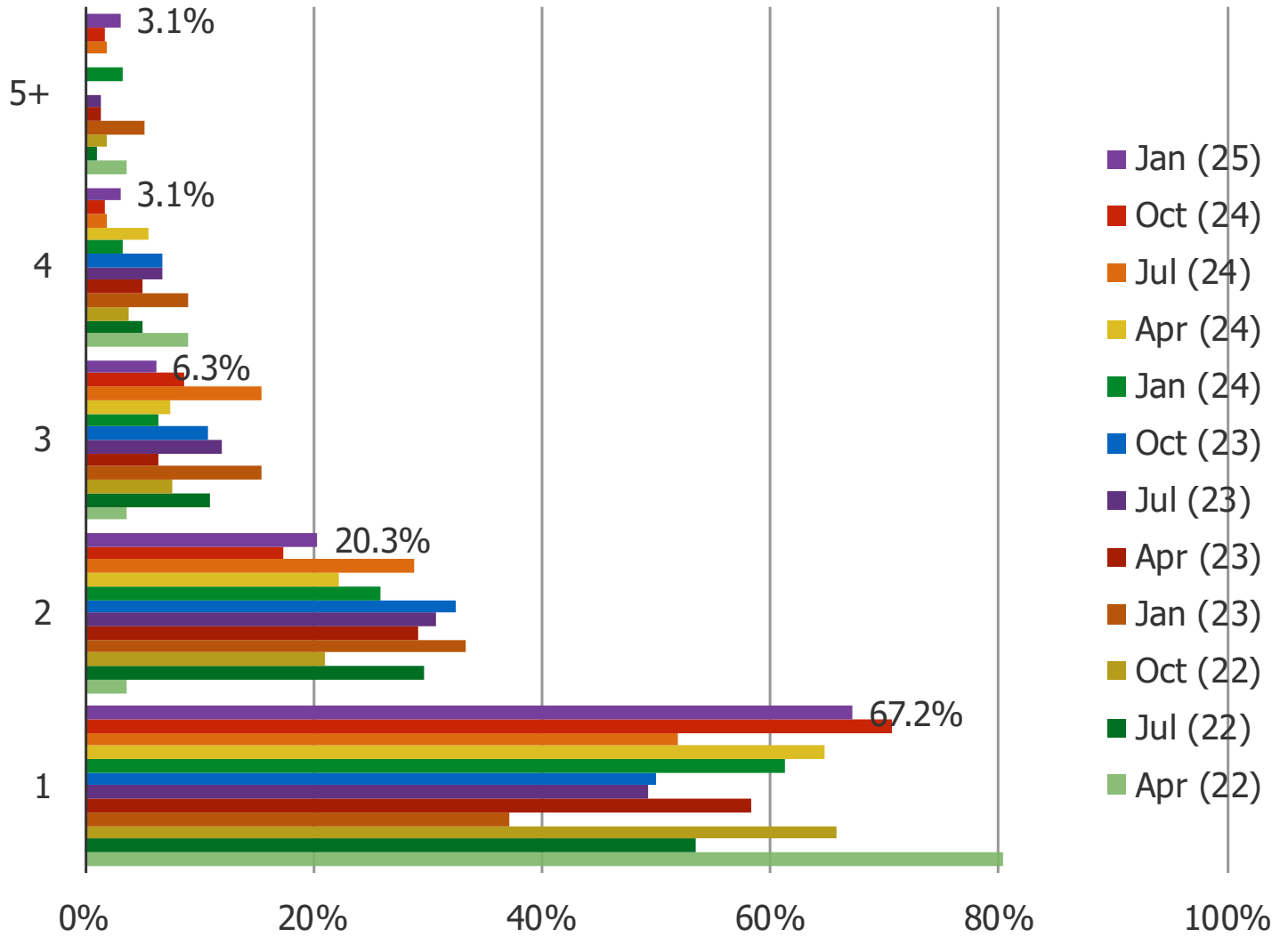
DO YOU LET ANYONE LIVING OUTSIDE OF YOUR HOUSEHOLD USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix or lives with someone who pays for Netflix (N=536).



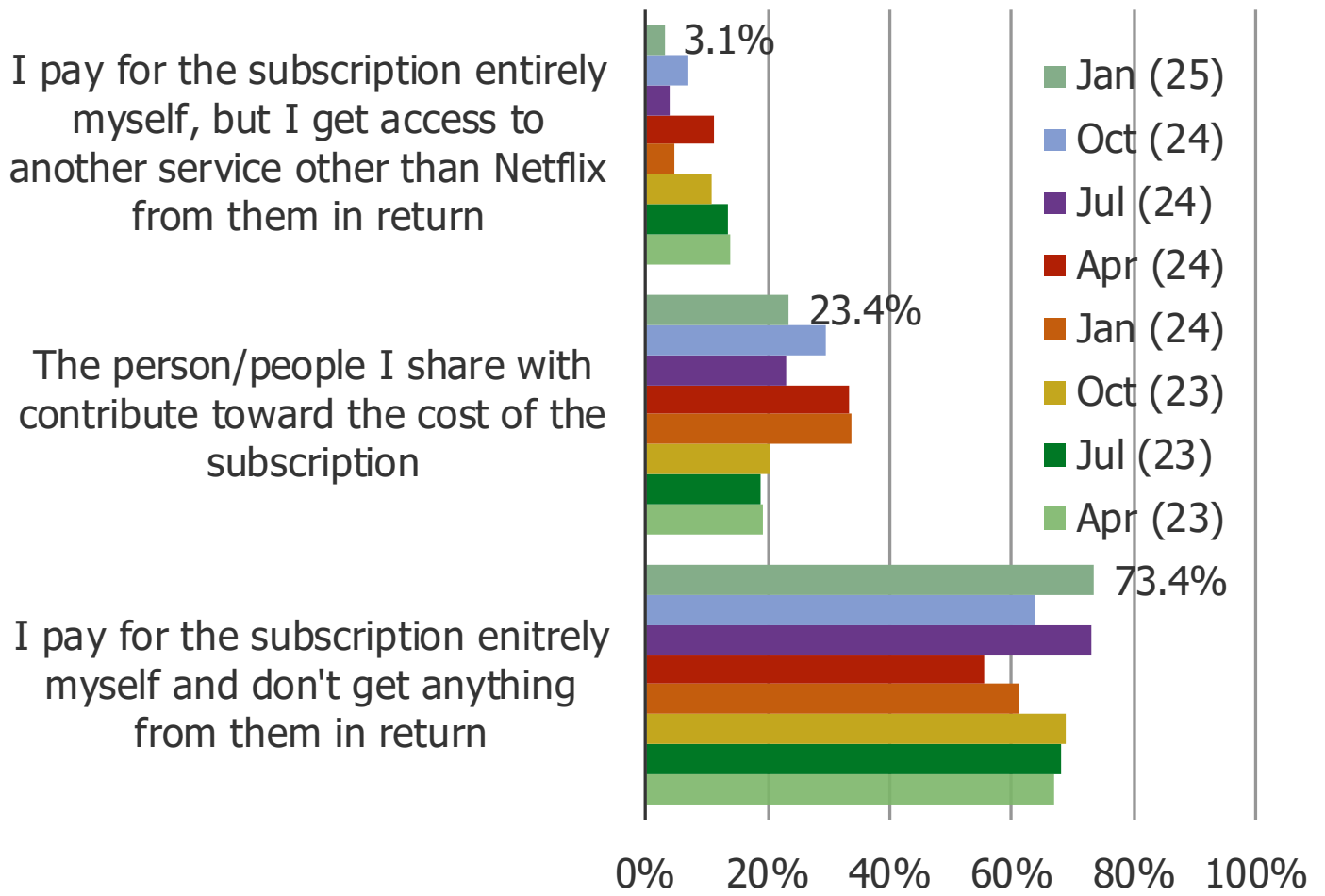
HOW MANY PEOPLE WHO LIVE OUTSIDE OF YOUR HOUSEHOLD DO YOU LET USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 64)



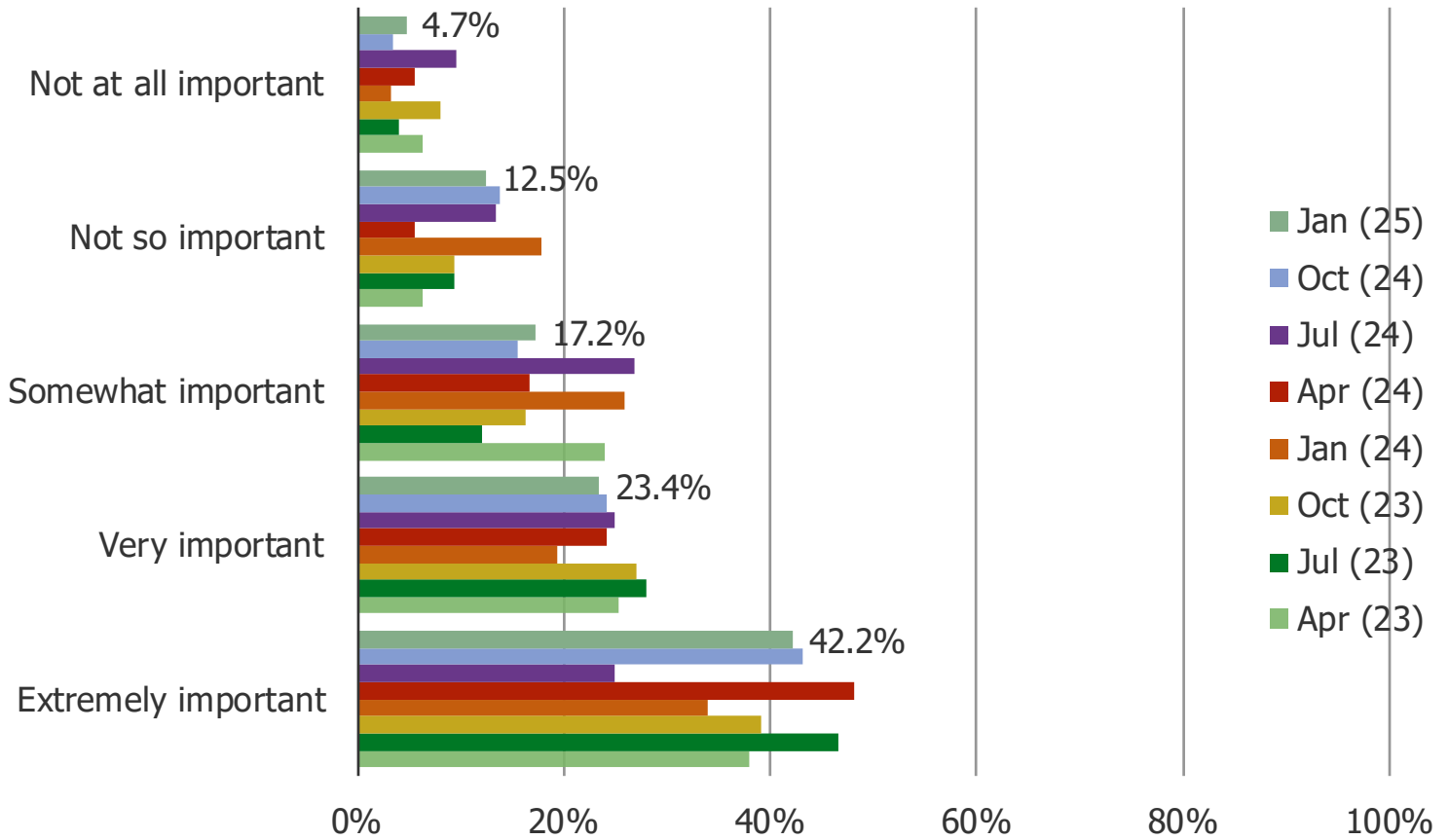
THINKING OF THE PERSON/PEOPLE YOU SHARE YOUR ACCOUNT WITH, WHO PAYS FOR THE SUBSCRIPTION?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=64)



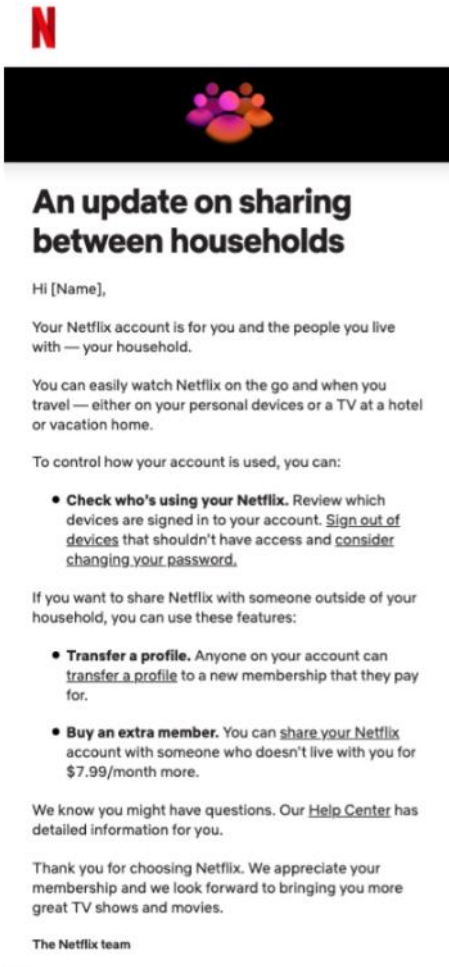
HOW IMPORTANT IS IT TO YOU TO BE ABLE TO SHARE YOUR NETFLIX ACCOUNT WITH PEOPLE WHO LIVE OUTSIDE OF YOUR HOME?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=64)



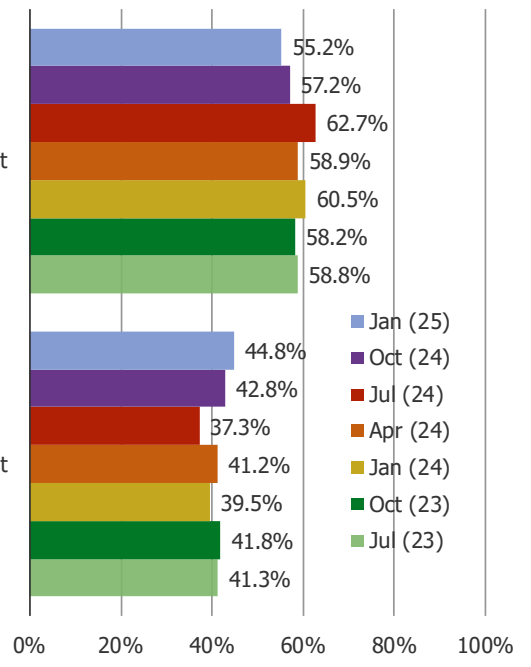
HAVE YOU RECEIVED AN EMAIL LIKE THE ONE BELOW FROM NETFLIX?

Posed to paying Netflix subscribers (N = 536)



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

Yes, I remember receiving an email like that

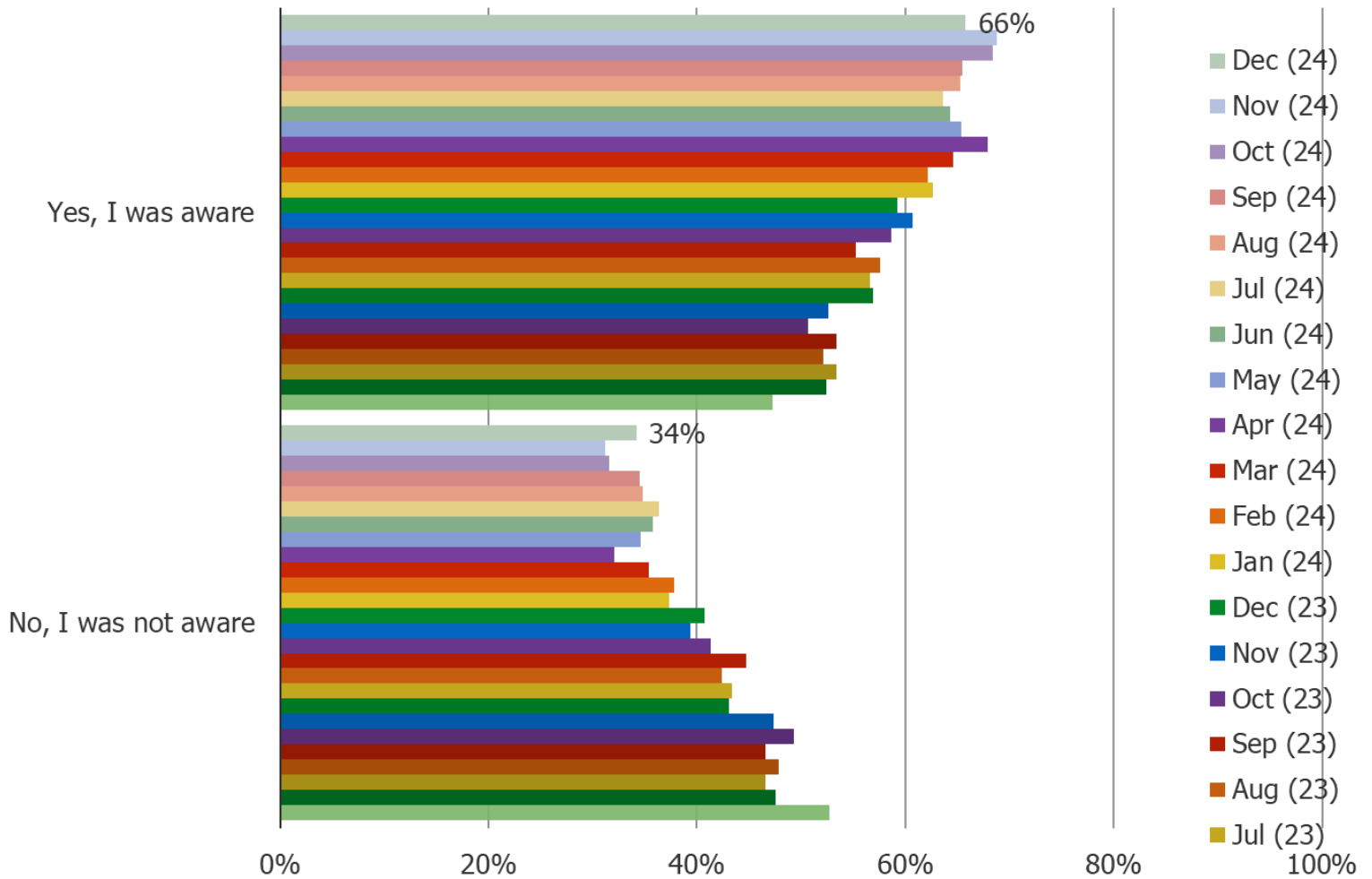


# STANDARD WITH ADS



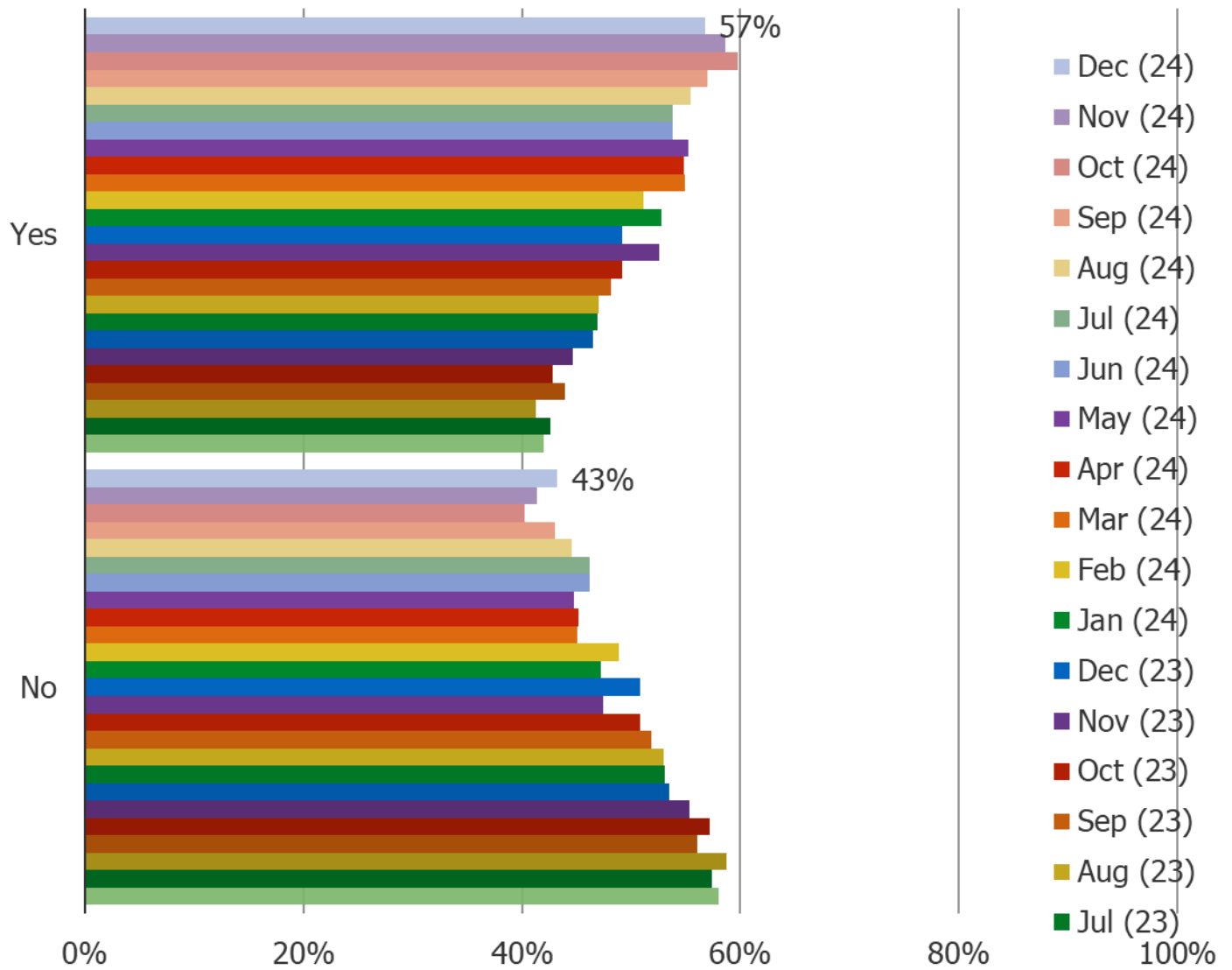
BEFORE TAKING THIS SURVEY, WERE YOU AWARE THAT NETFLIX HAS AN AD-SUPPORTED TIER WITH COMMERCIALS?

Posed to all respondents.



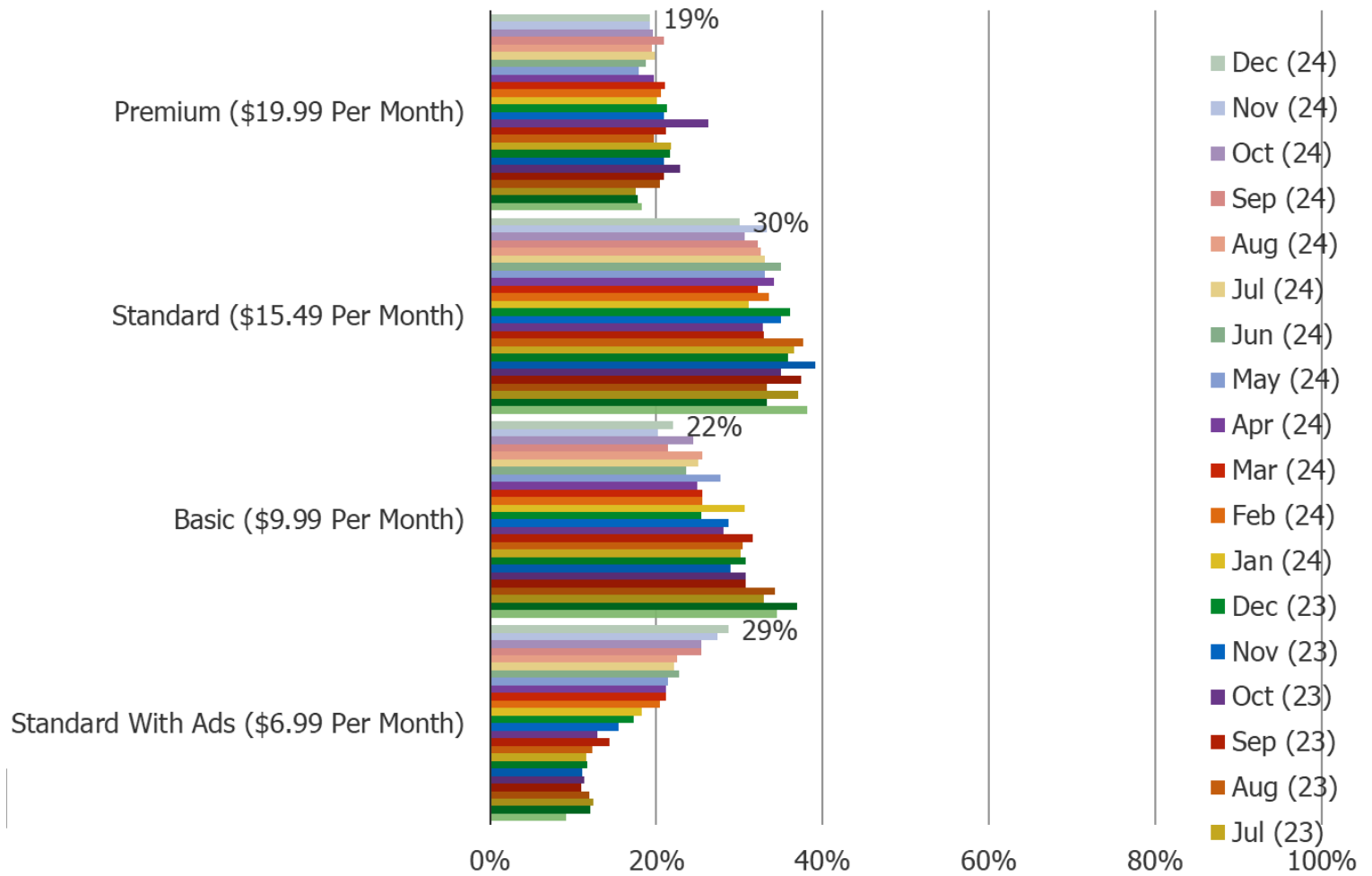
BEFORE TAKING THIS SURVEY, WERE YOU AWARE THAT DISNEY+ HAS AN AD-SUPPORTED TIER WITH COMMERCIALS?

Posed to all respondents.



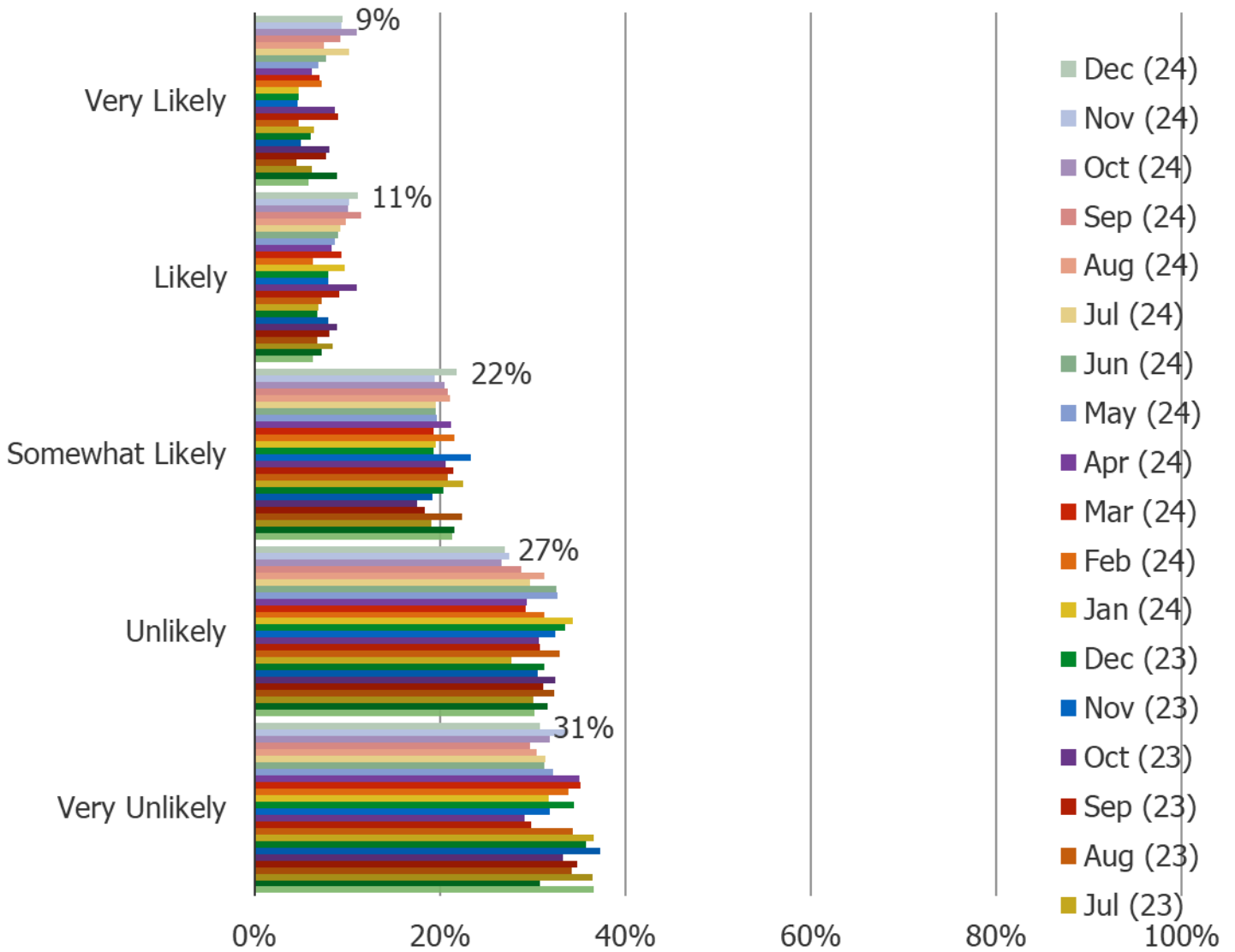
WHICH OF THE FOLLOWING MOST ACCURATELY DESCRIBES YOUR NETFLIX SUBSCRIPTION?

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?

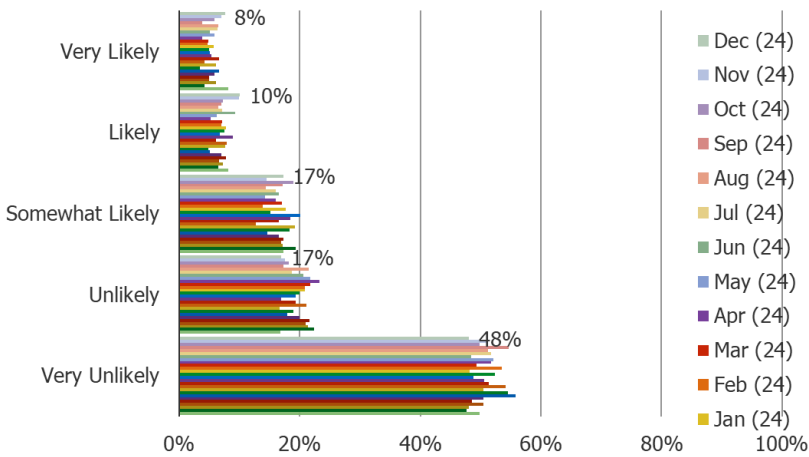
Posed to all respondents who are Netflix subscribers but are not on the ad supported plan.



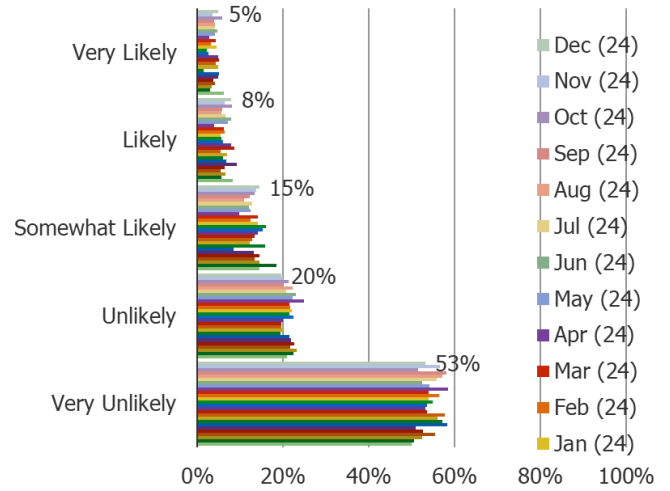
HOW LIKELY ARE YOU TO SIGN UP FOR THE FOLLOWING NETFLIX PLANS IN THE NEXT MONTH?

Posed to all respondents who are not currently Netflix subscribers.

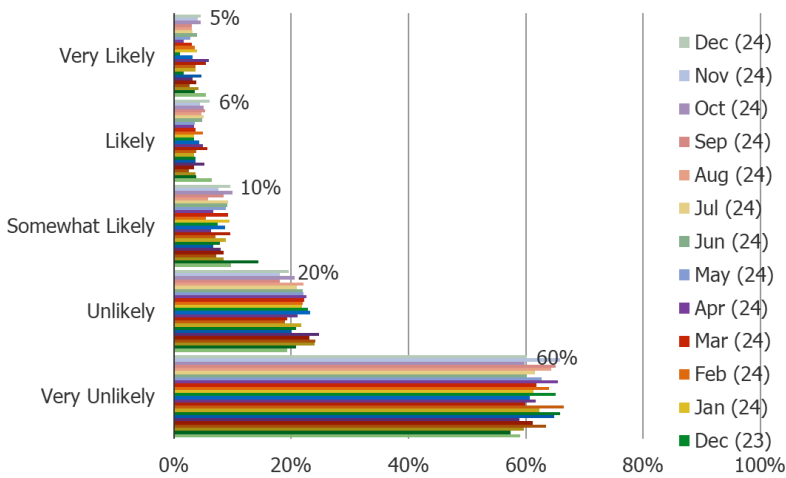
Standard with Ads



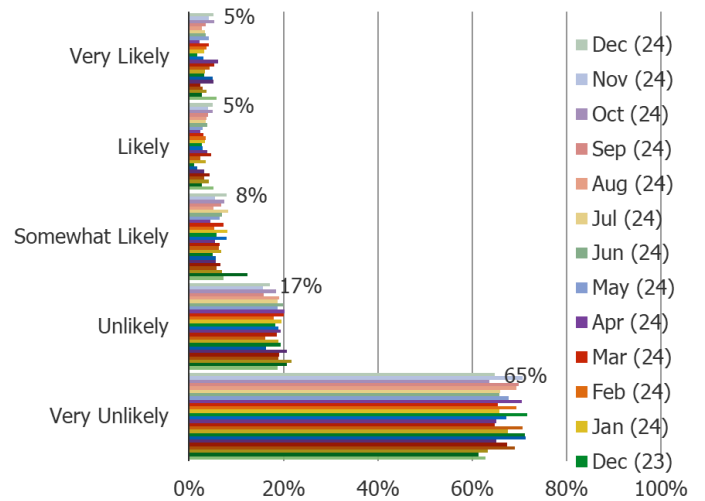
Basic



Standard

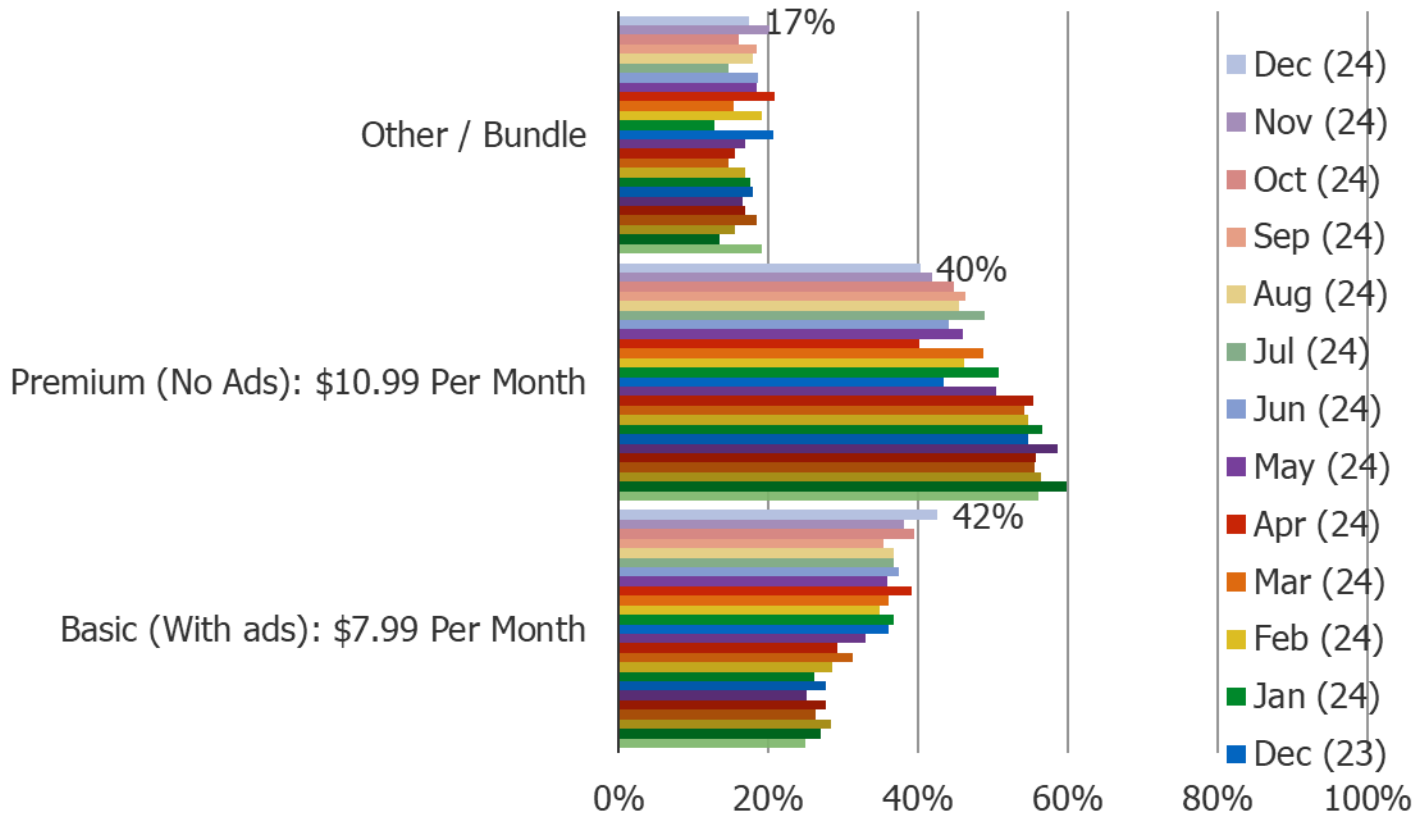


Premium



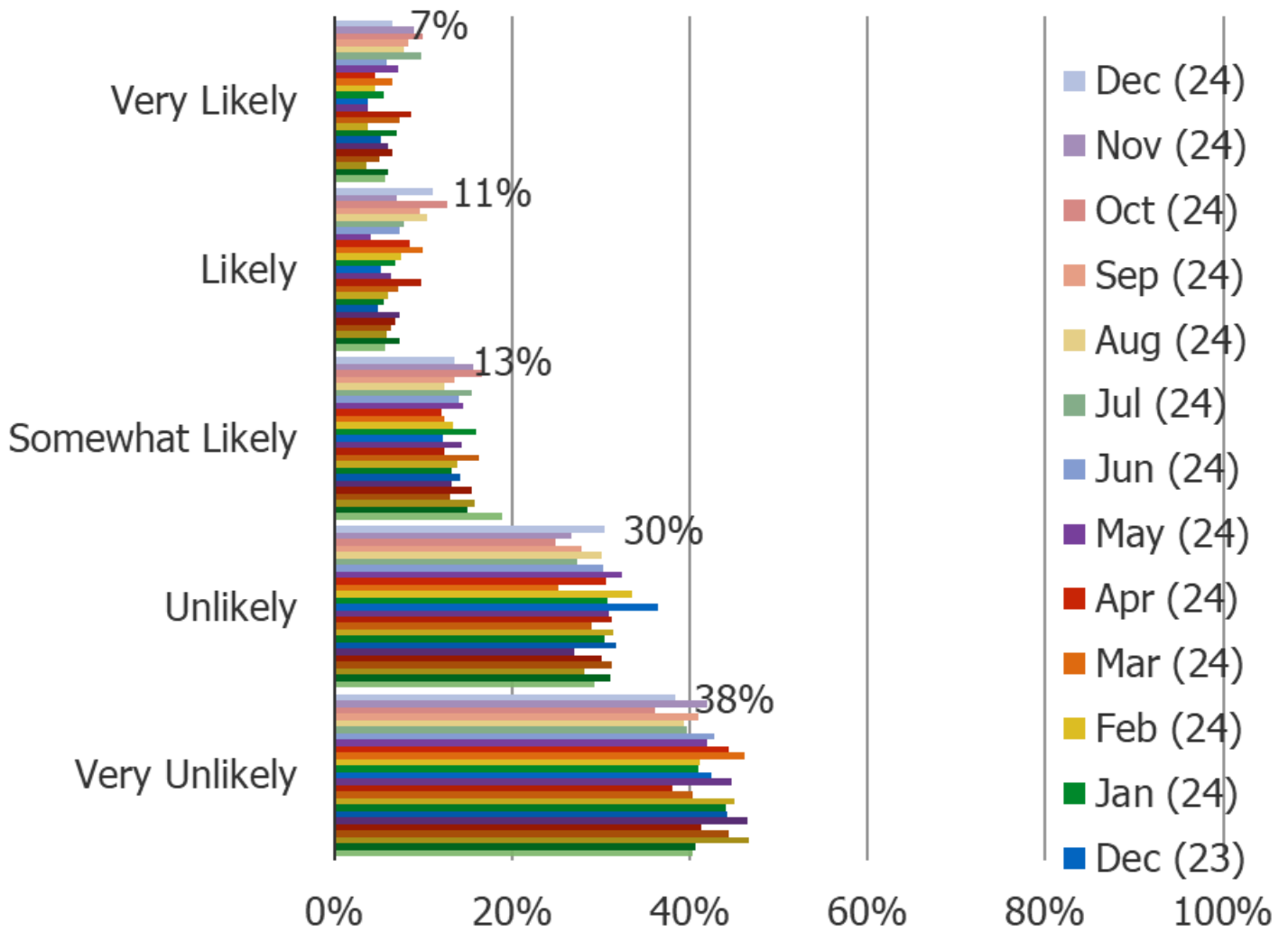
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR DISNEY+ SUBSCRIPTION?

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?

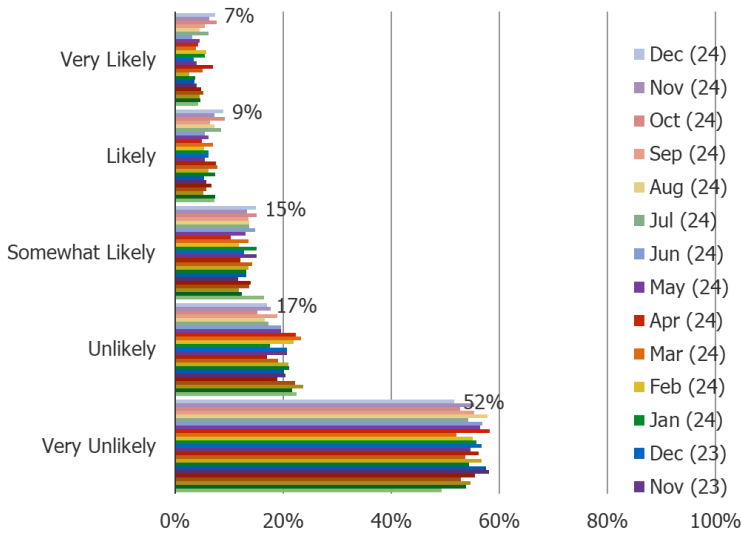
Posed to all respondents who are Disney+ subscribers but are not on the ad supported plan currently.



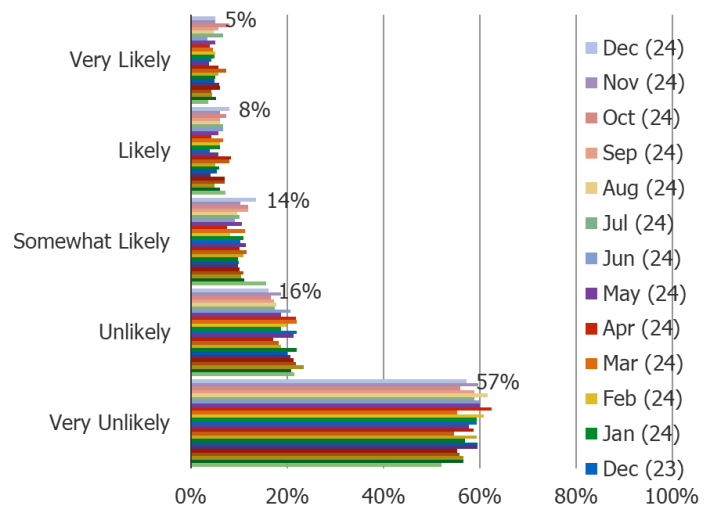
HOW LIKELY ARE YOU TO SIGN UP FOR THE FOLLOWING DISNEY+ PLANS IN THE NEXT MONTH?

Posed to respondents who are not currently Disney+ subscribers.

Basic (With ads): \$7.99 Per Month



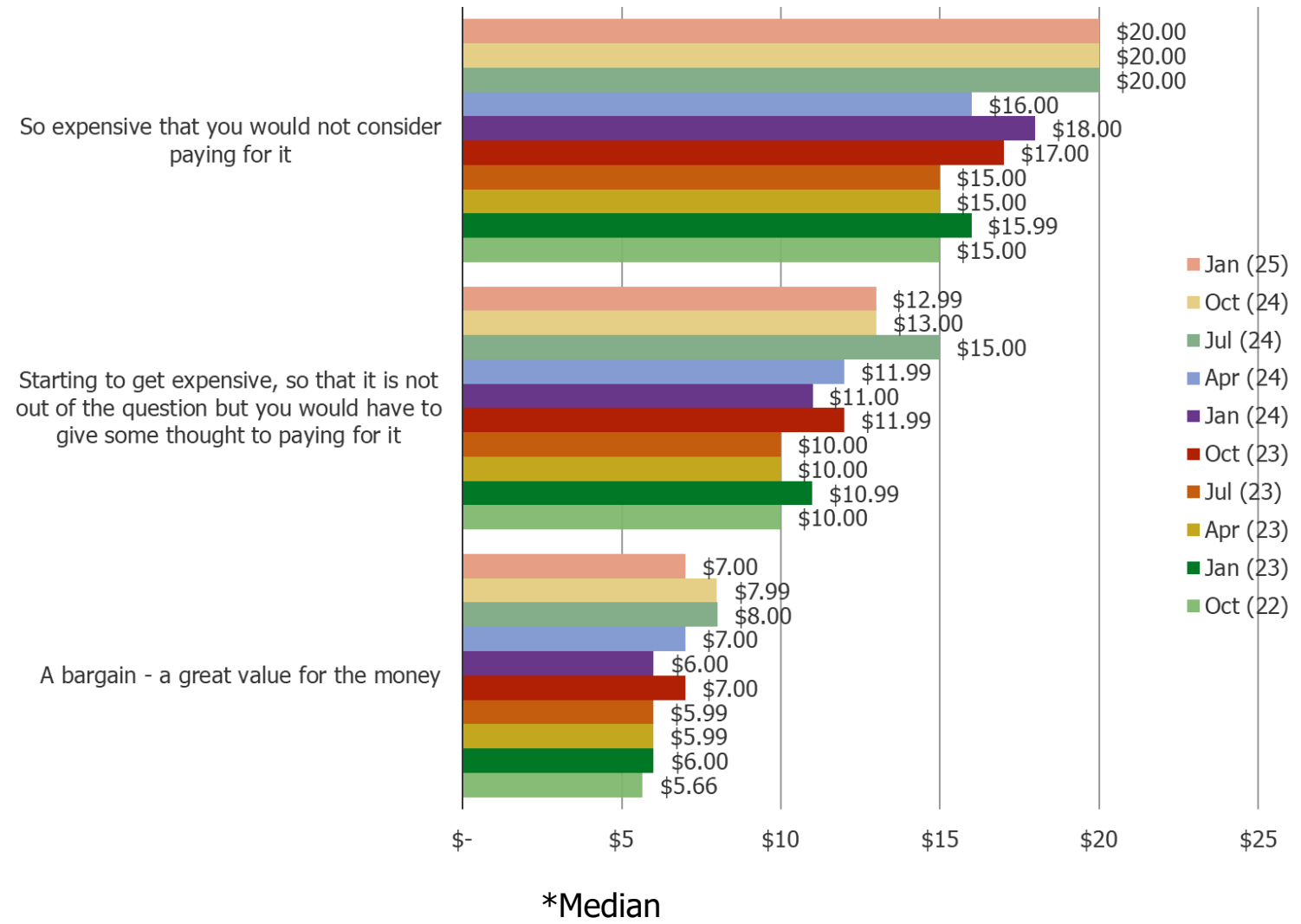
Premium (No Ads): \$10.99 Per Month





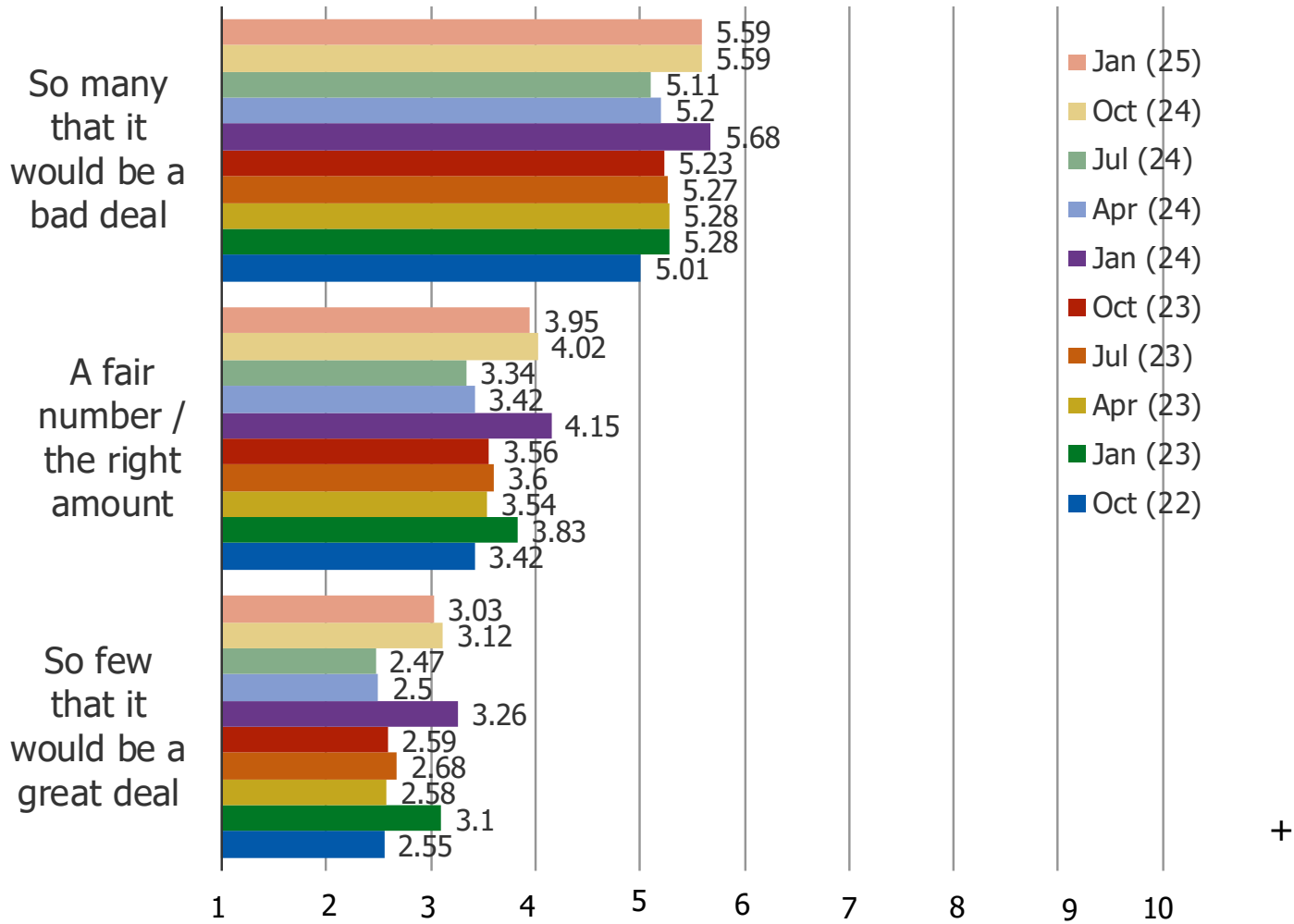
AT WHAT PRICES PER MONTH WOULD YOU CONSIDER A NETFLIX AD-SUPPORTED TIER TO BE...

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



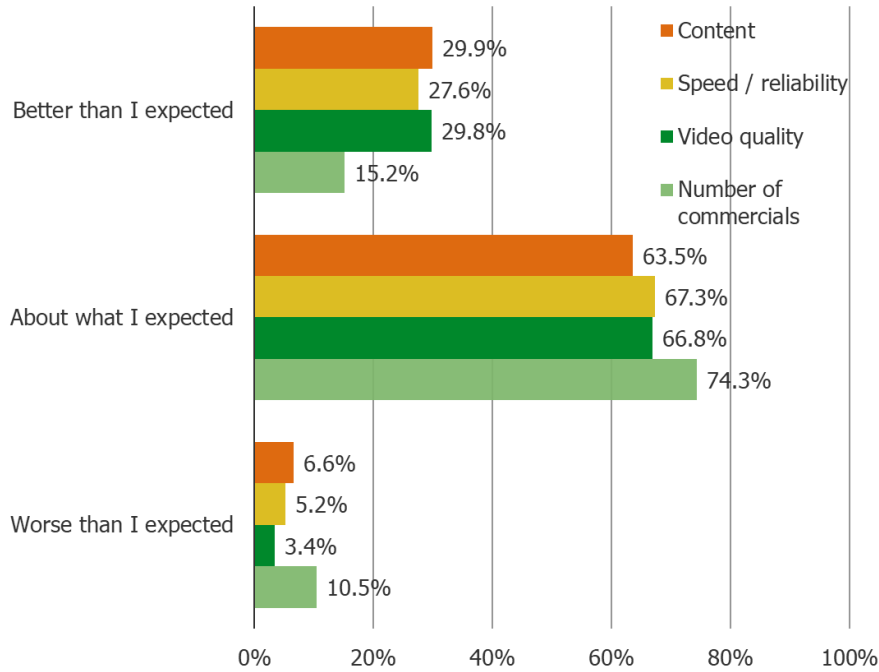
THINKING ABOUT NETFLIX'S AD-SUPPORTED TIER, HOW MANY COMMERCIALS PER HOUR WOULD YOU CONSIDER TO BE...

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N =1076

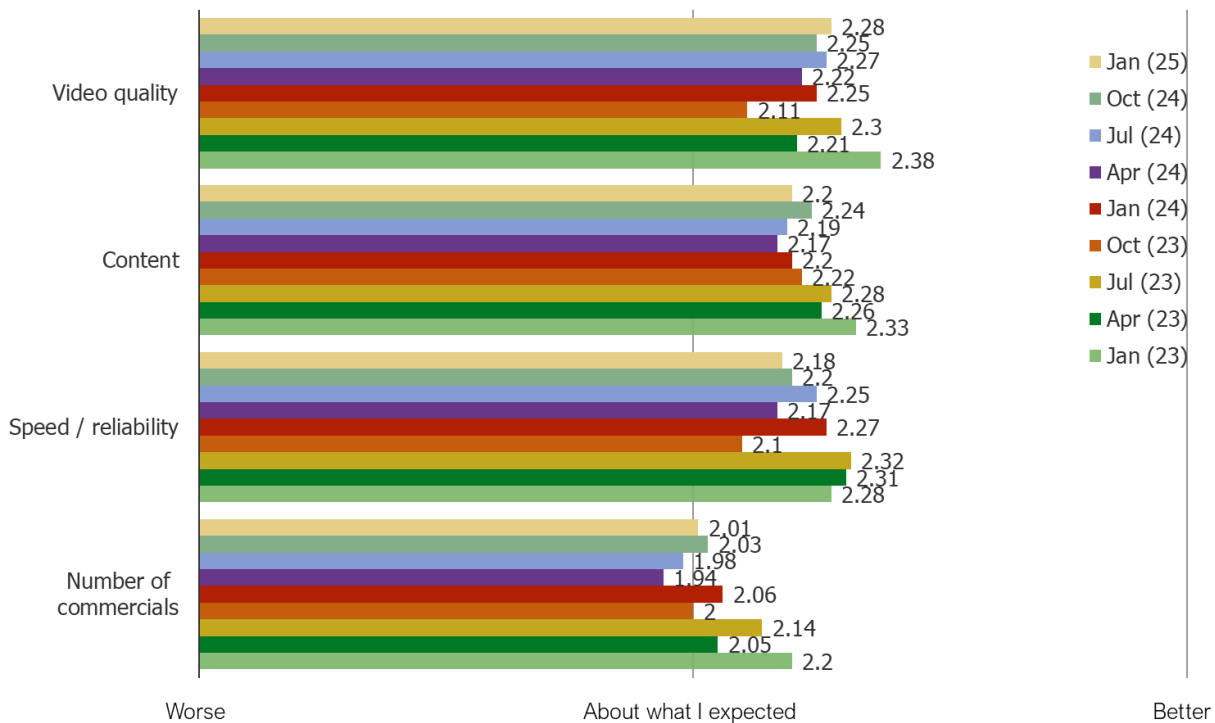


HOW DOES YOUR EXPERIENCE WITH THE STANDARDS WITH ADS PLAN COMPARE TO YOUR EXPECTATIONS WHEN IT COMES TO THE FOLLOWING?

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 1067

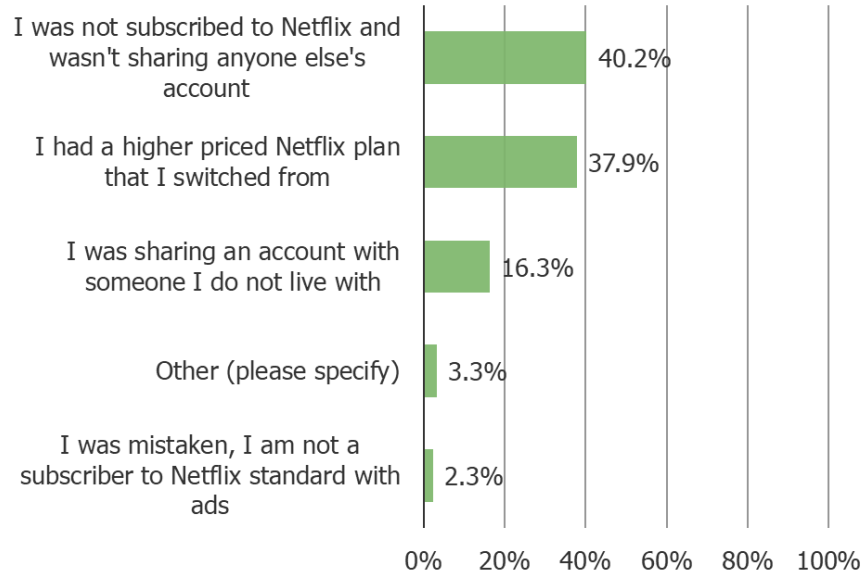


Weighted Average, vs. Historical Readings

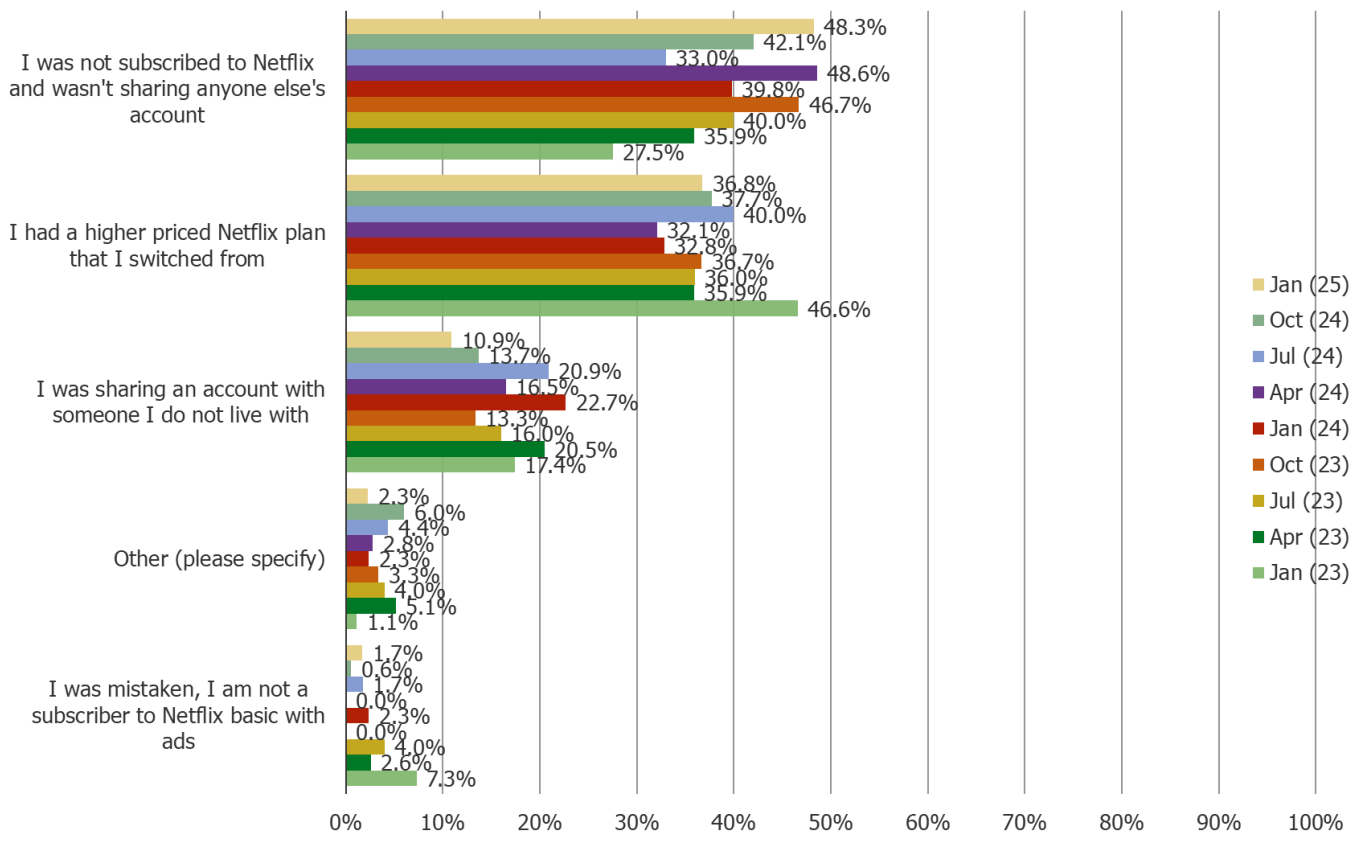


BEFORE YOU SIGNED UP FOR NETFLIX STANDARD WITH ADS, WHICH OF THE FOLLOWING BEST DESCRIBES YOU?

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 1067



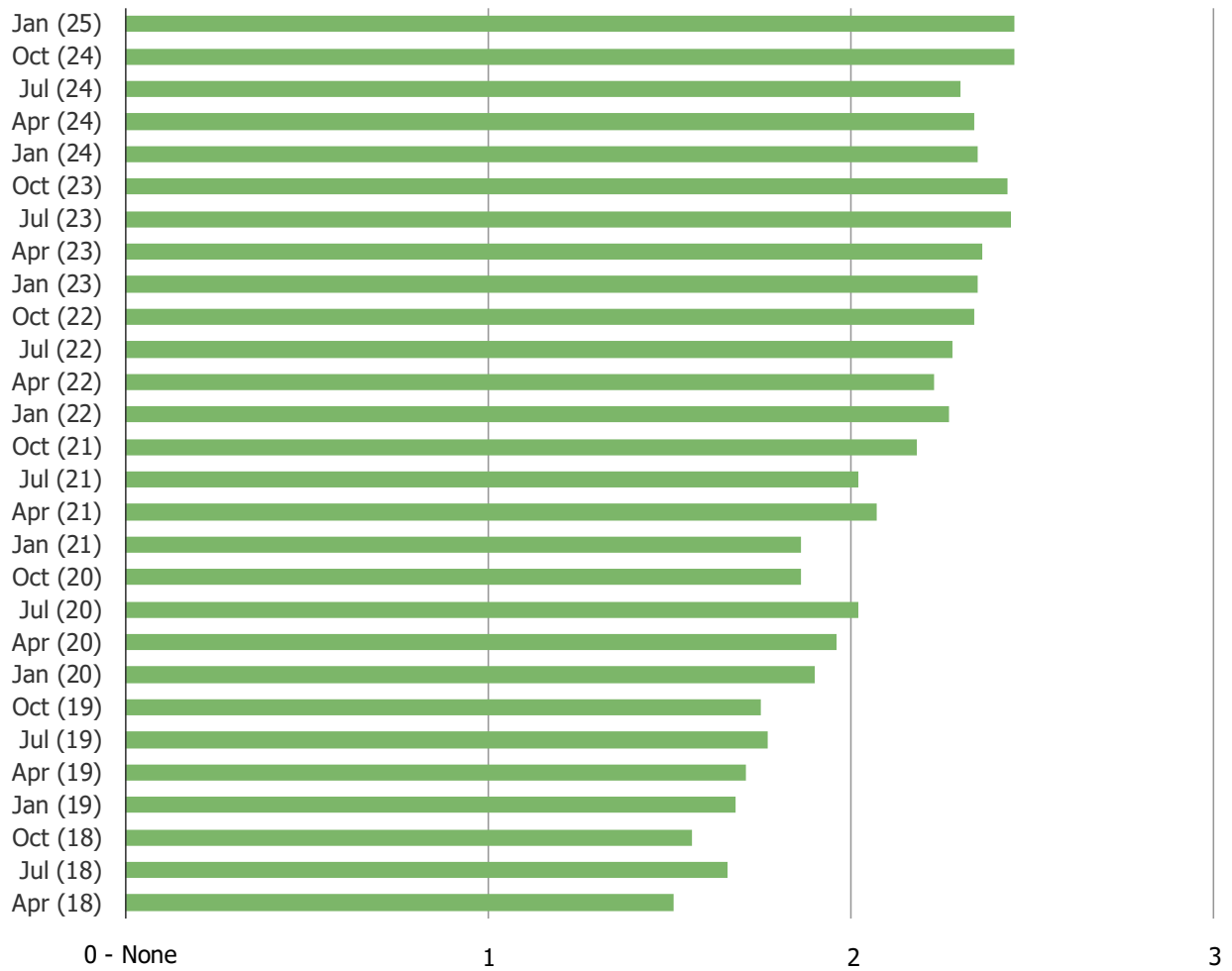
Historical Readings, Wave by Wave...



# STREAMING SECTOR DYNAMICS

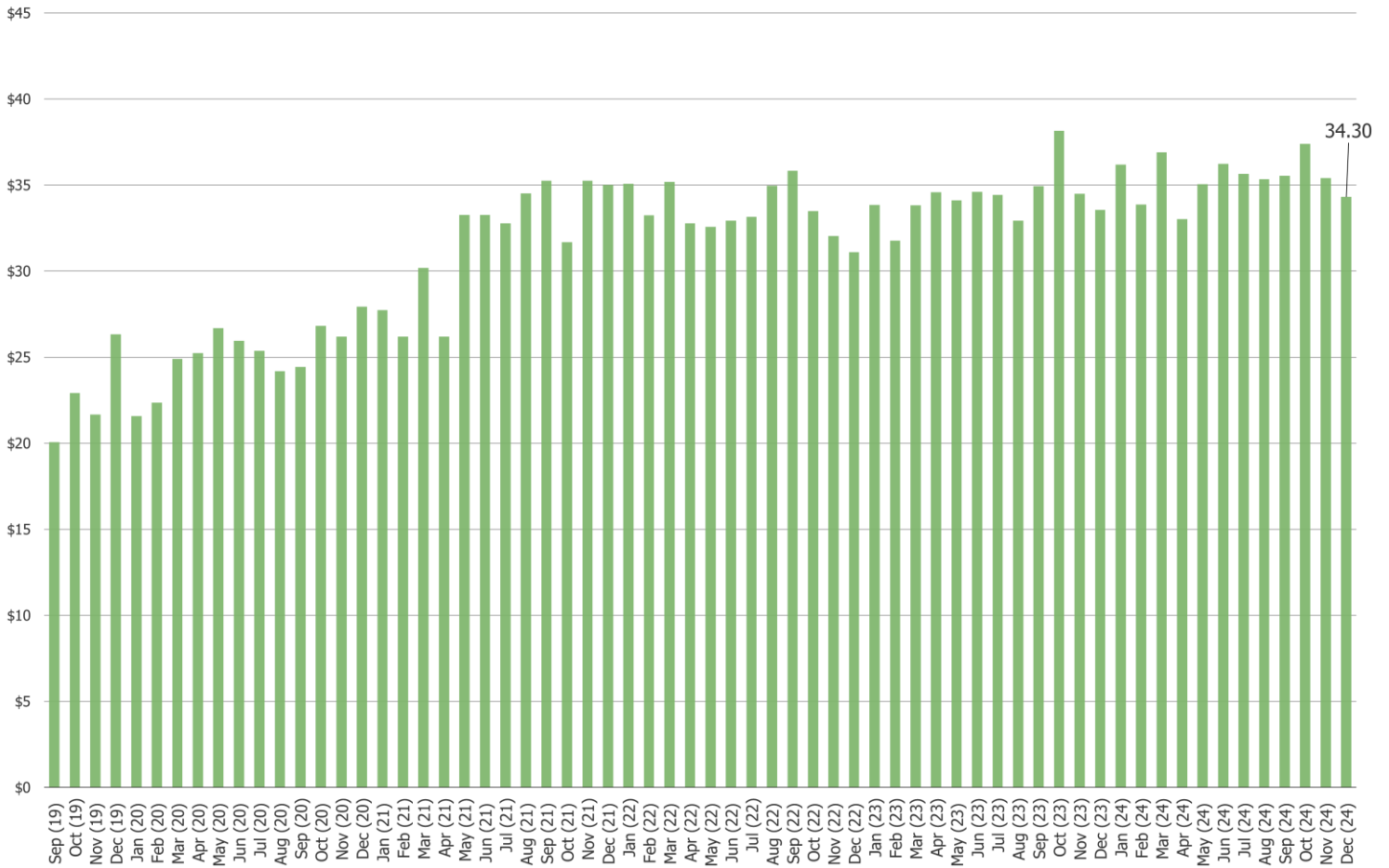
HOW MANY STREAMING VIDEO SERVICES DO YOU THINK IS THE RIGHT NUMBER TO BE PAYING FOR AT THE SAME TIME?

Posed to all respondents.



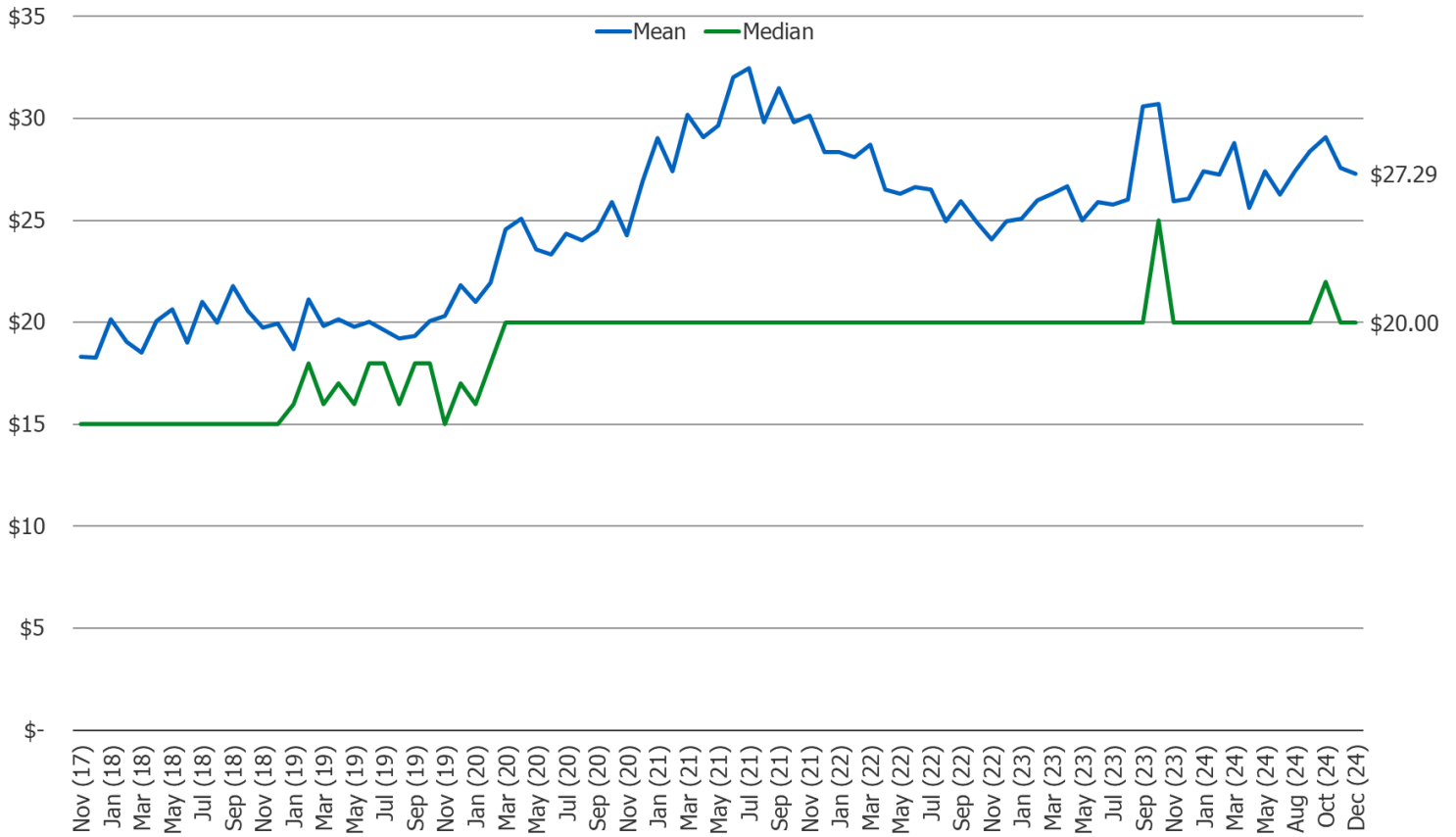
HOW MUCH DO YOU THINK IS APPROPRIATE TO SPEND ON STREAMING VIDEO SERVICES, IN TOTAL, PER MONTH?

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?)

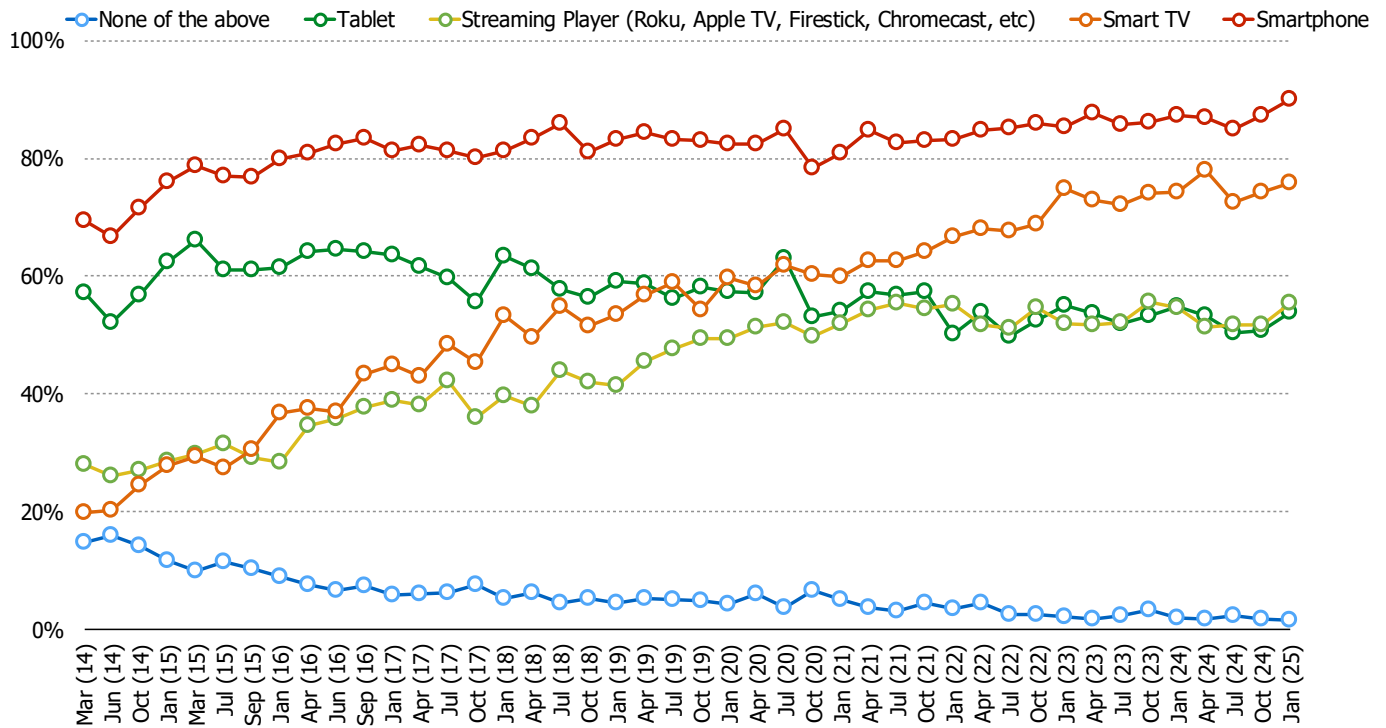
Posed to all respondents.





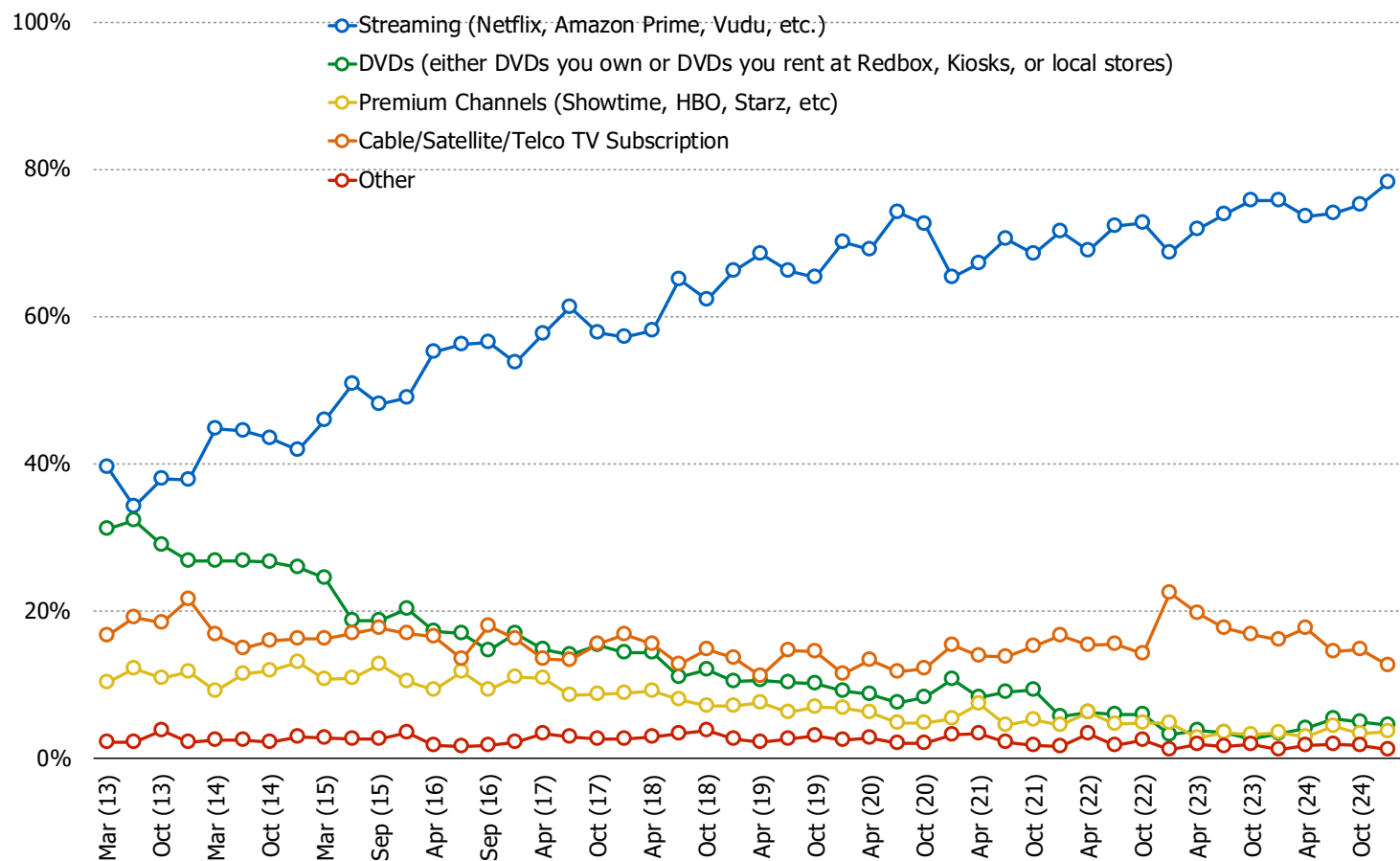
INTERNET CONNECTED DEVICES OWNED BY RESPONDENTS

This question was posed to the target audience.



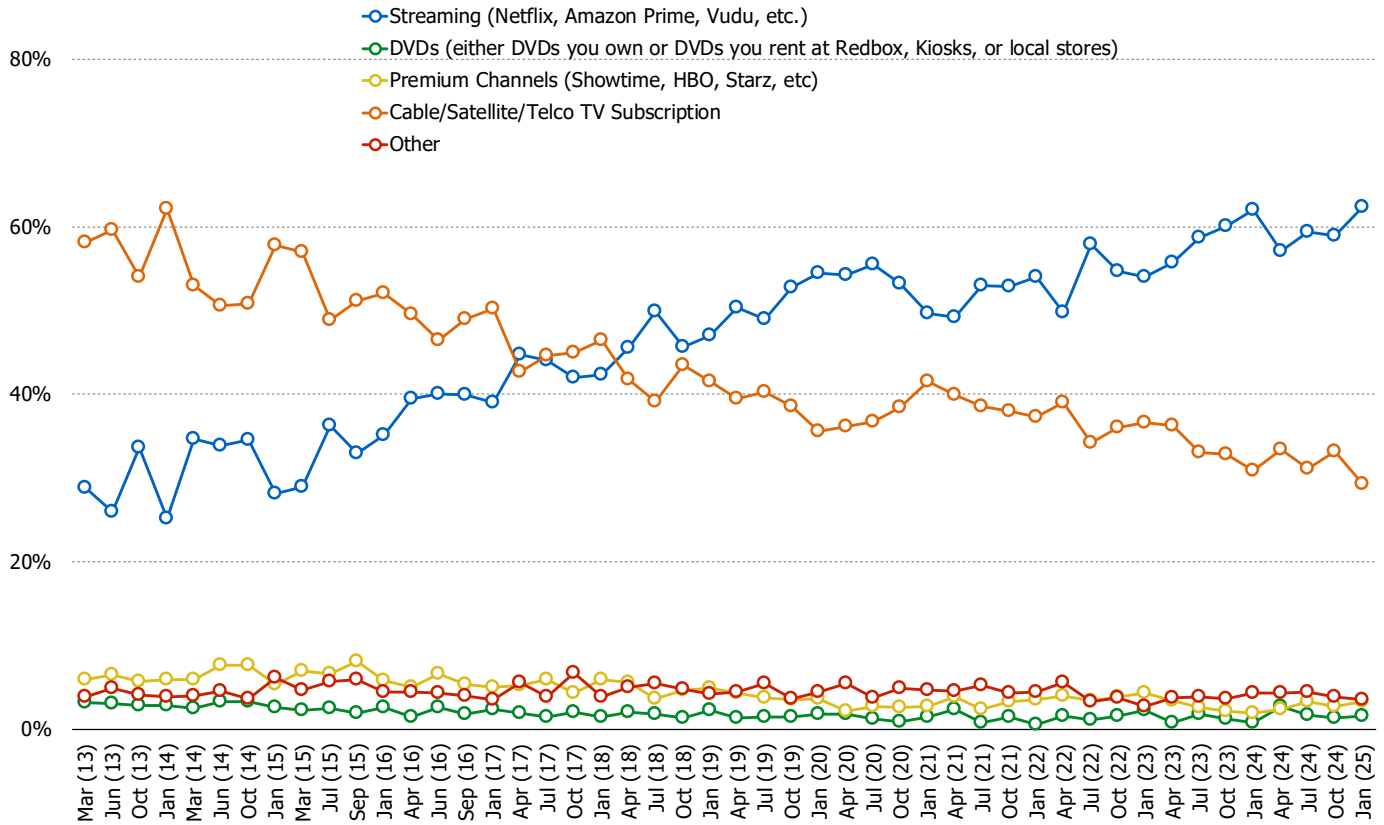
### PREFERRED METHOD FOR WATCHING MOVIES

This question was posed to the target audience.



PREFERRED METHOD FOR WATCHING TELEVISION SHOWS

This question was posed to the target audience.

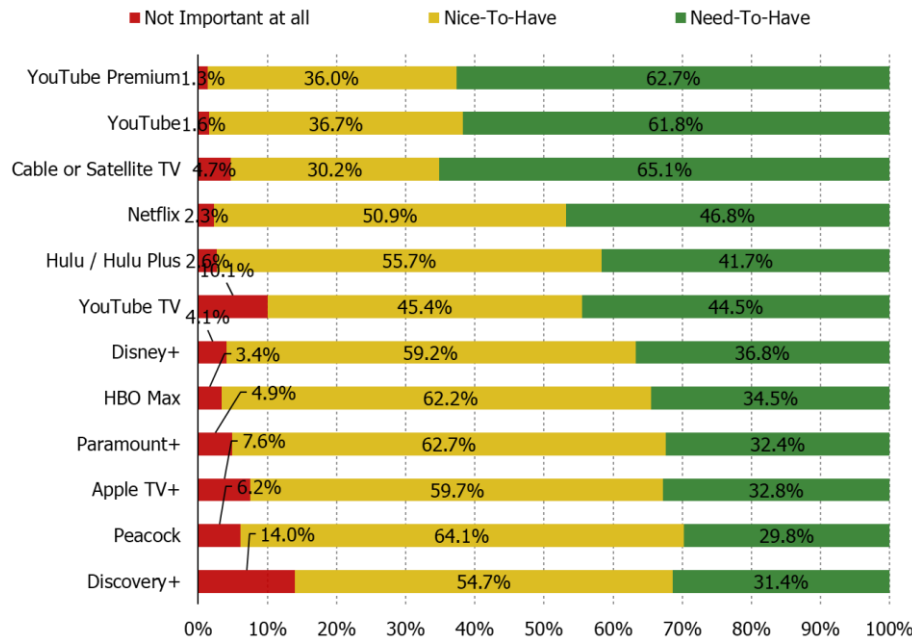


## STREAMING PLATFORMS – COMPETITIVE DYNAMICS

DO YOU CONSIDER THE FOLLOWING TO BE...

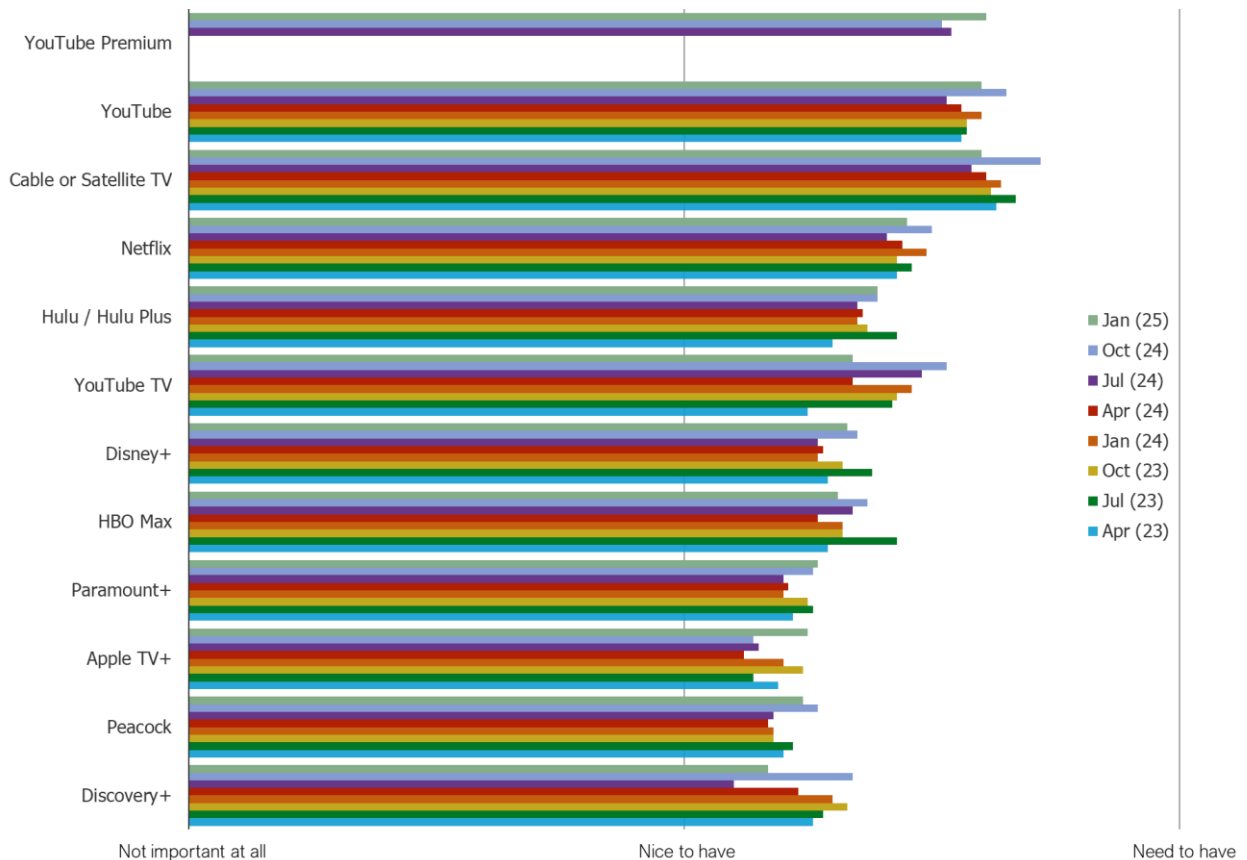
Posed to all respondents who use the below methods/services to watch movies/TV shows/video content at home.

JANUARY 2025



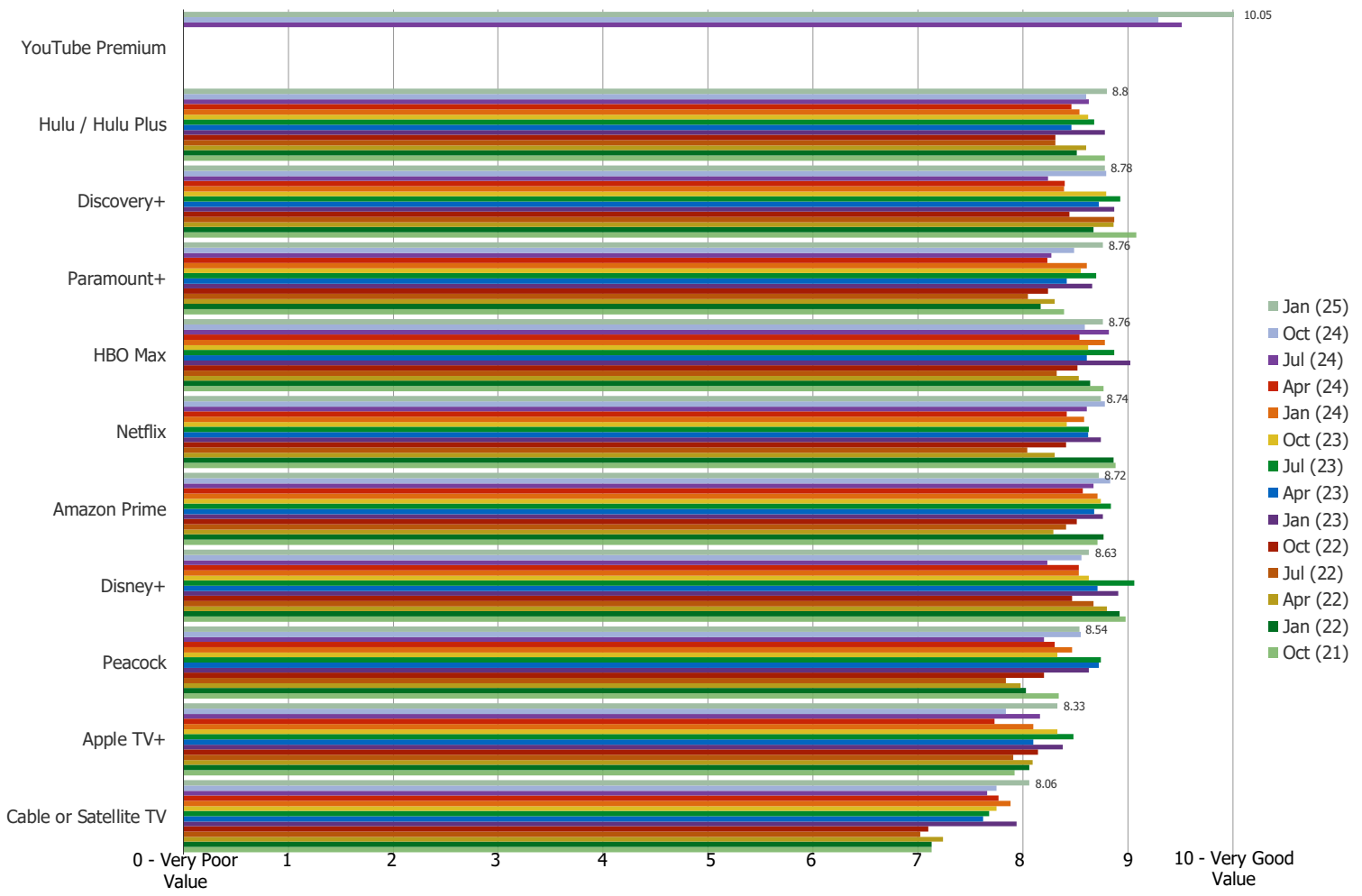
| Service               | N=  |
|-----------------------|-----|
| Discovery+            | 86  |
| Peacock               | 309 |
| Apple TV+             | 119 |
| Paramount+            | 324 |
| HBO Max               | 296 |
| Disney+               | 321 |
| YouTube TV            | 119 |
| Hulu / Hulu Plus      | 379 |
| Netflix               | 566 |
| Cable or Satellite TV | 301 |
| YouTube               | 387 |
| YouTube Premium       | 75  |

History - Weighted Average



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

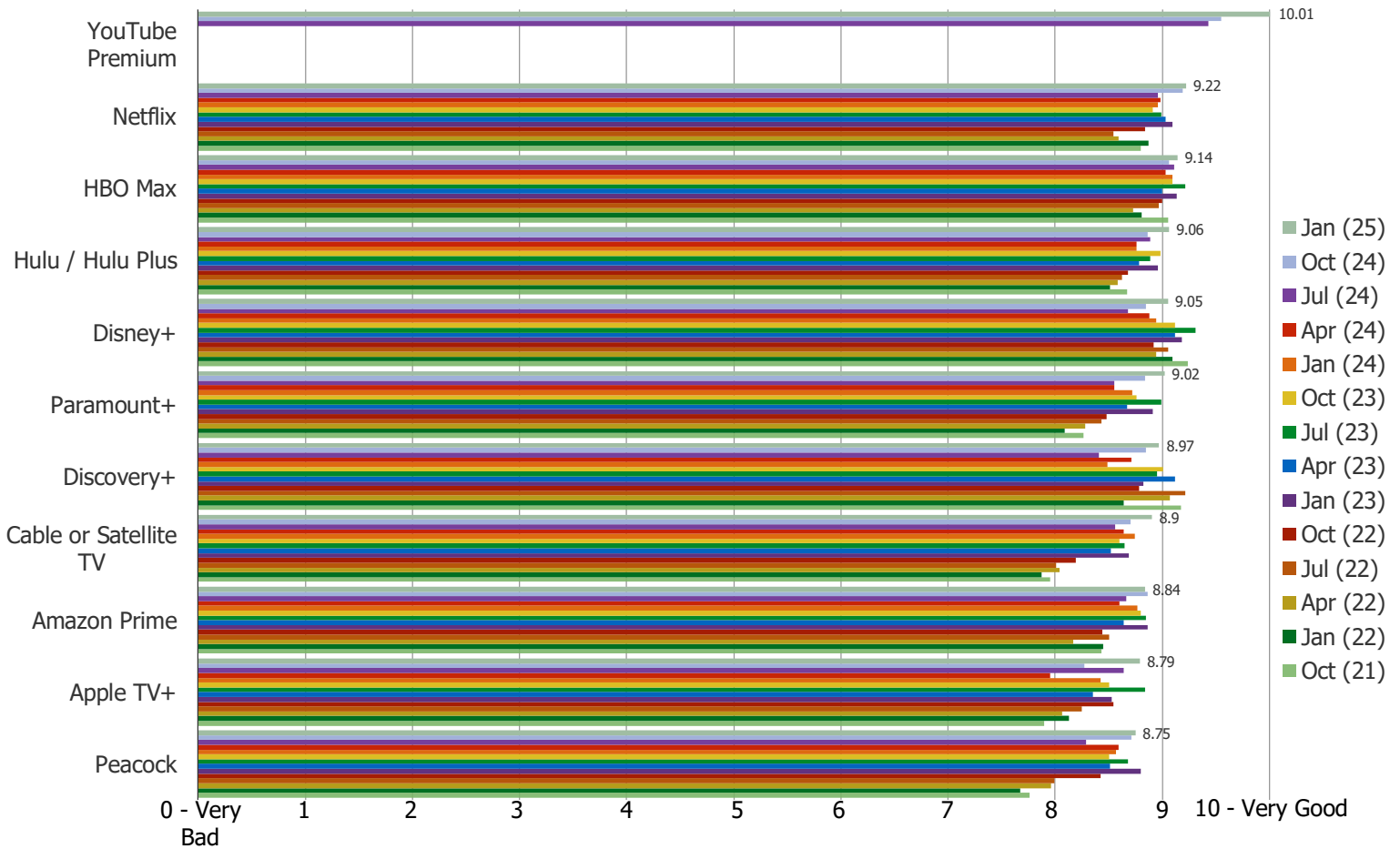
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



|                       | N=  |
|-----------------------|-----|
| Netflix               | 536 |
| Hulu / Hulu Plus      | 359 |
| HBO Max               | 265 |
| Amazon Prime          | 510 |
| Apple TV+             | 112 |
| Cable or Satellite TV | 301 |
| Disney+               | 299 |
| YouTube Premium       | 74  |
| Peacock               | 287 |
| Discovery+            | 73  |
| Paramount+            | 302 |

PLEASE RATE THE CONTENT AVAILABLE ON THE FOLLOWING:

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



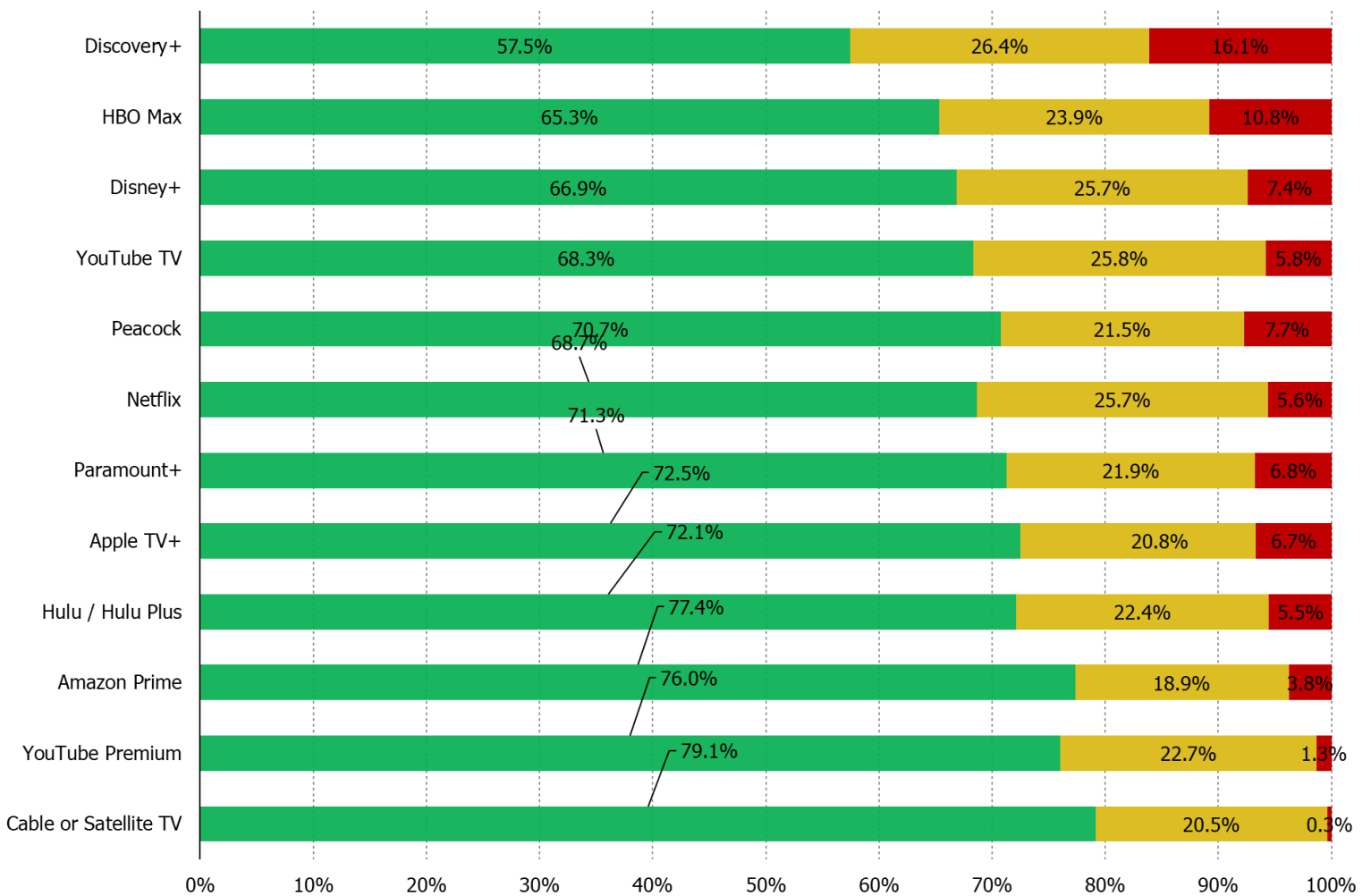
|                       | N=  |
|-----------------------|-----|
| Netflix               | 536 |
| Hulu / Hulu Plus      | 359 |
| HBO Max               | 265 |
| Amazon Prime          | 510 |
| Apple TV+             | 112 |
| Cable or Satellite TV | 301 |
| Disney+               | 299 |
| YouTube Premium       | 74  |
| Peacock               | 287 |
| Discovery+            | 73  |
| Paramount+            | 302 |

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.

JANUARY 2025

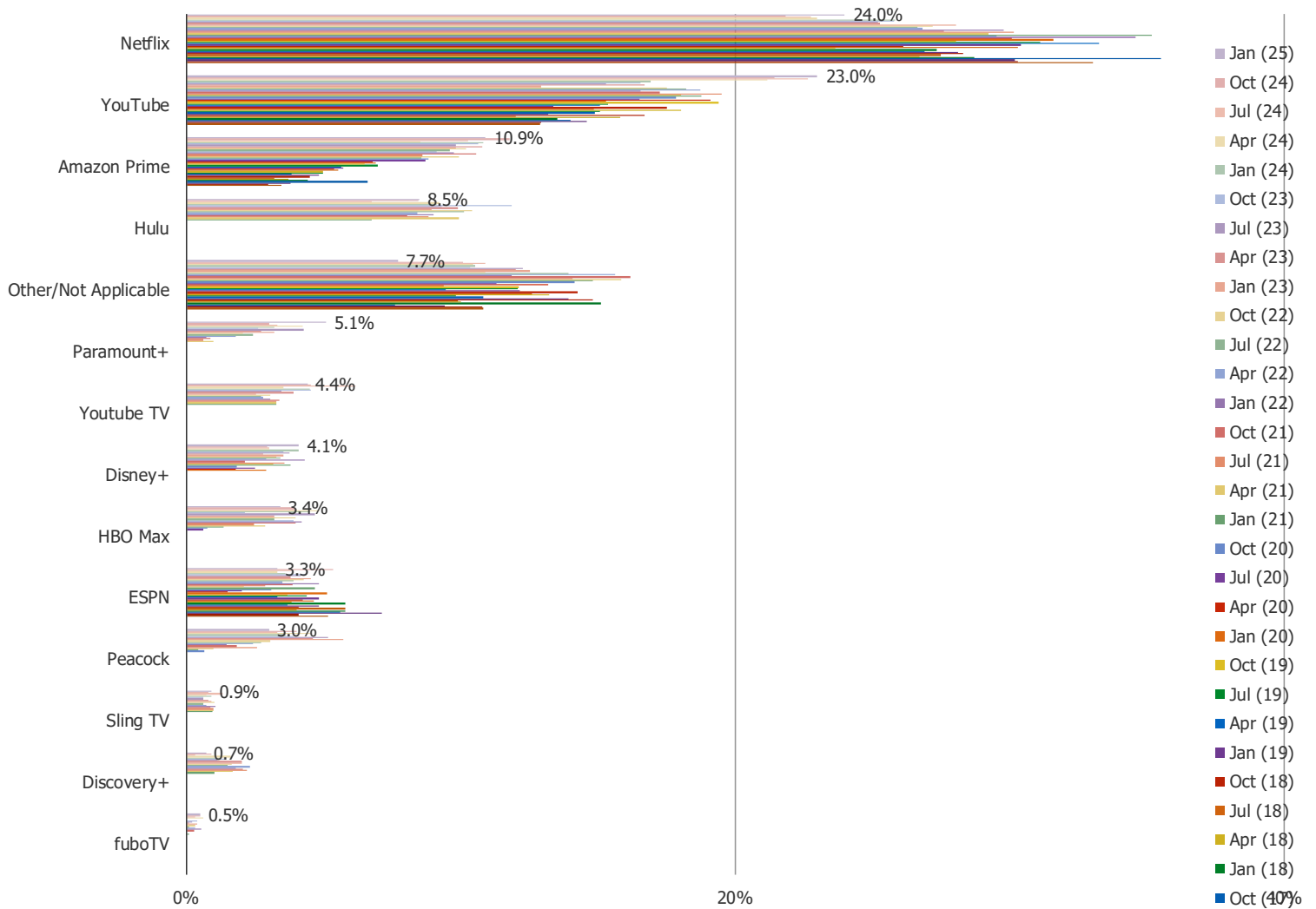
■ I pay for this service myself   ■ I live with someone who pays for this service   ■ I access this service via someone's log-in who I don't live with





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

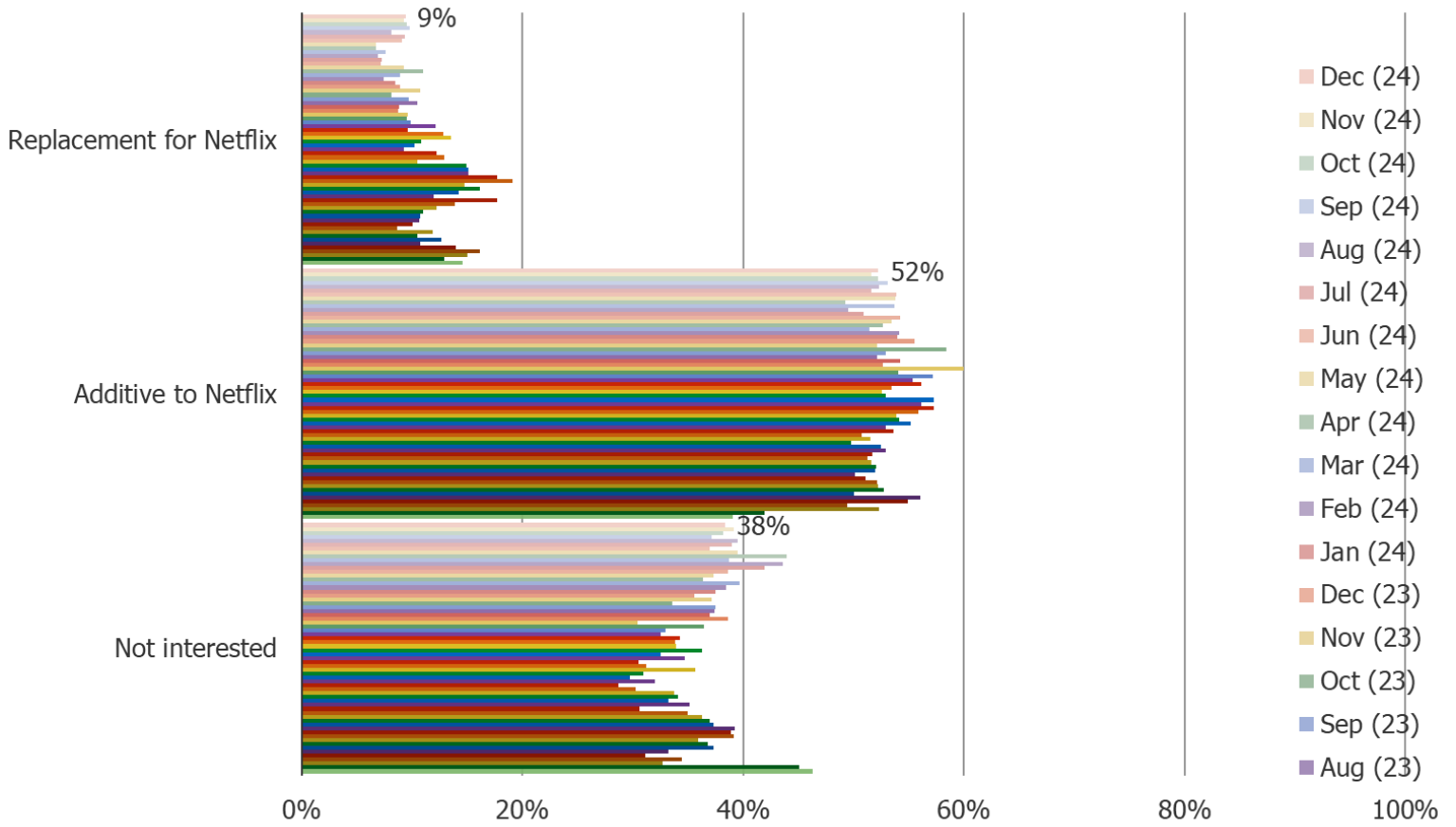
Posed to all respondents



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

Posed to Netflix subscribers.

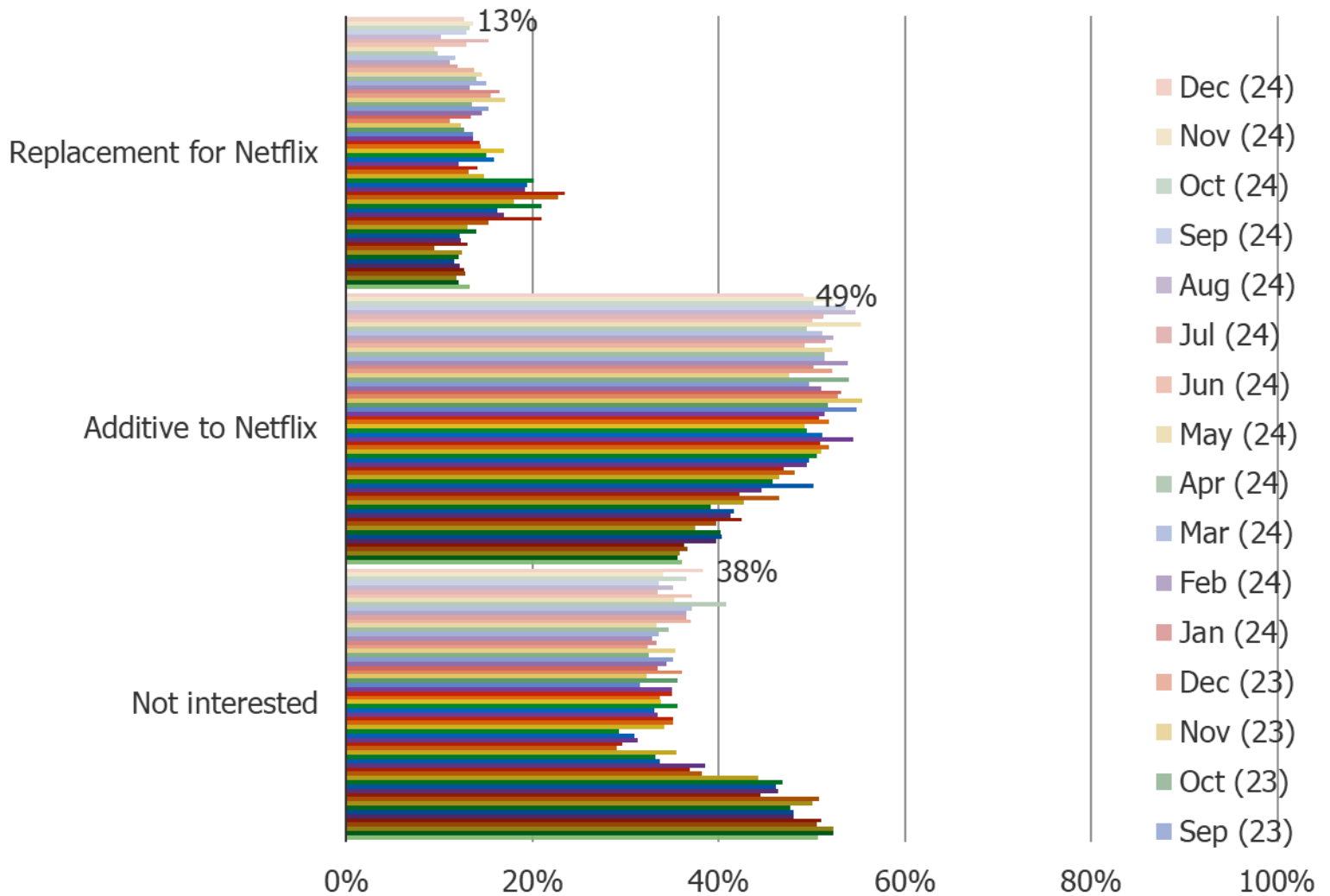
Disney+



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

Posed to Netflix subscribers.

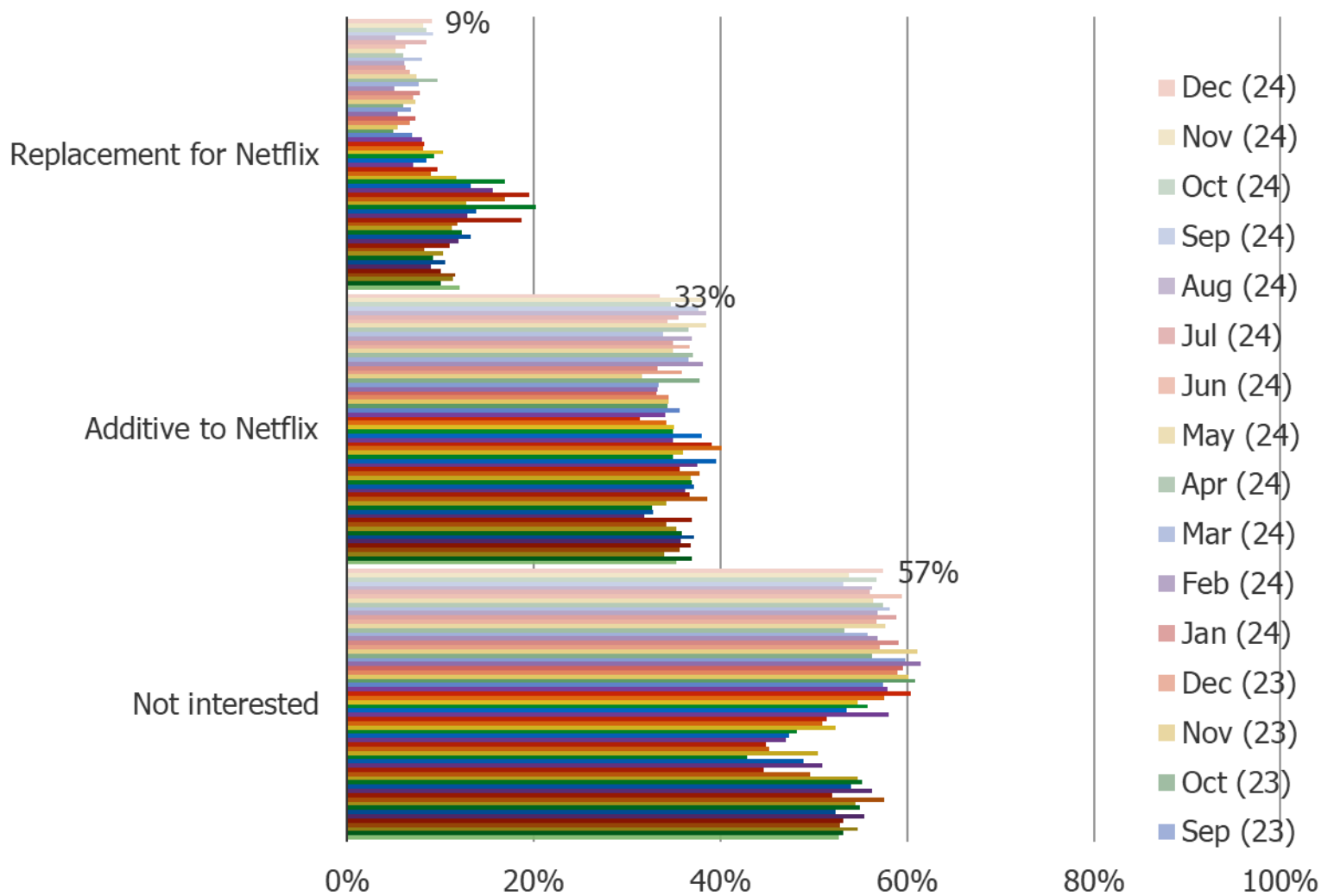
HBO Max



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

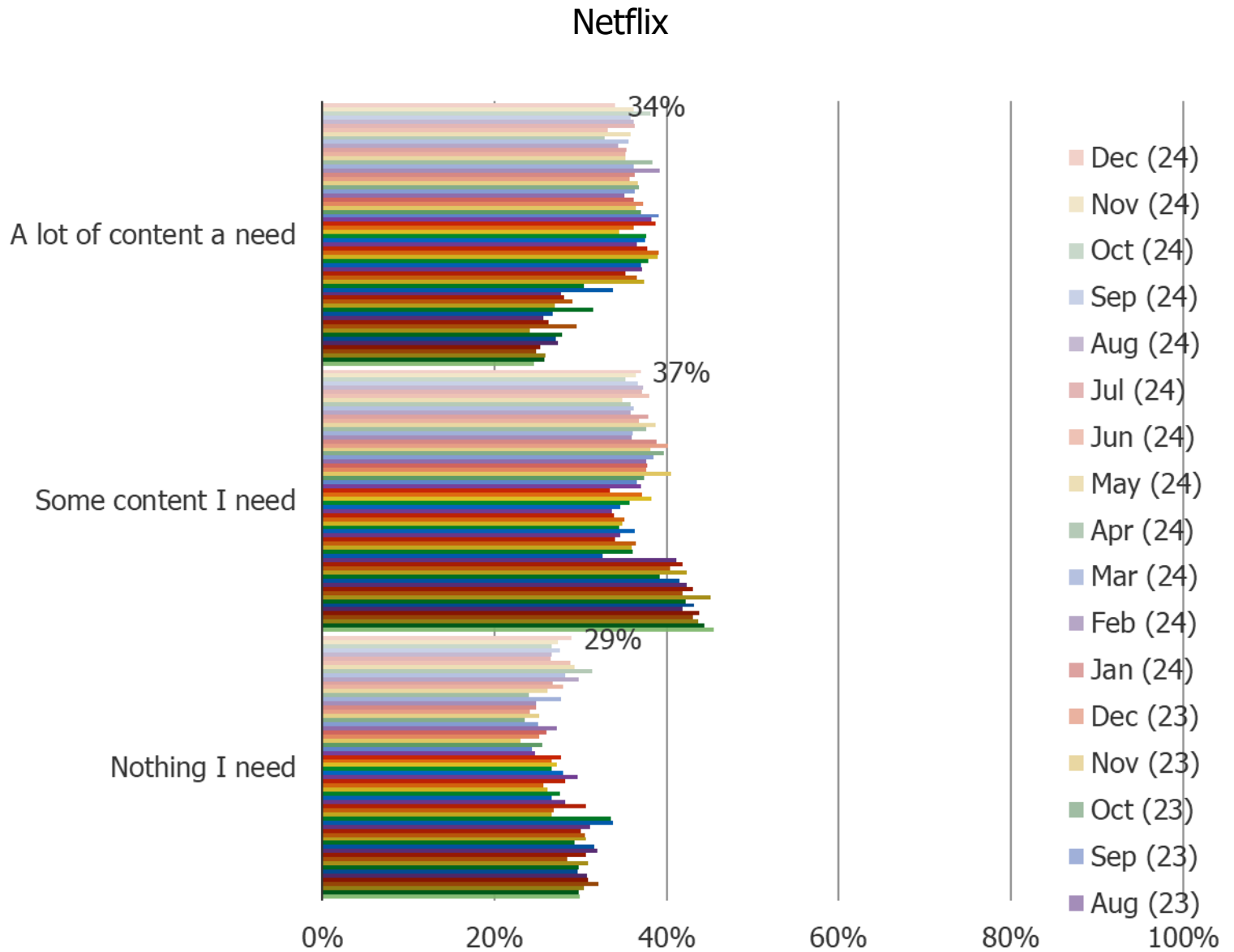
Posed to Netflix subscribers.

Apple TV+



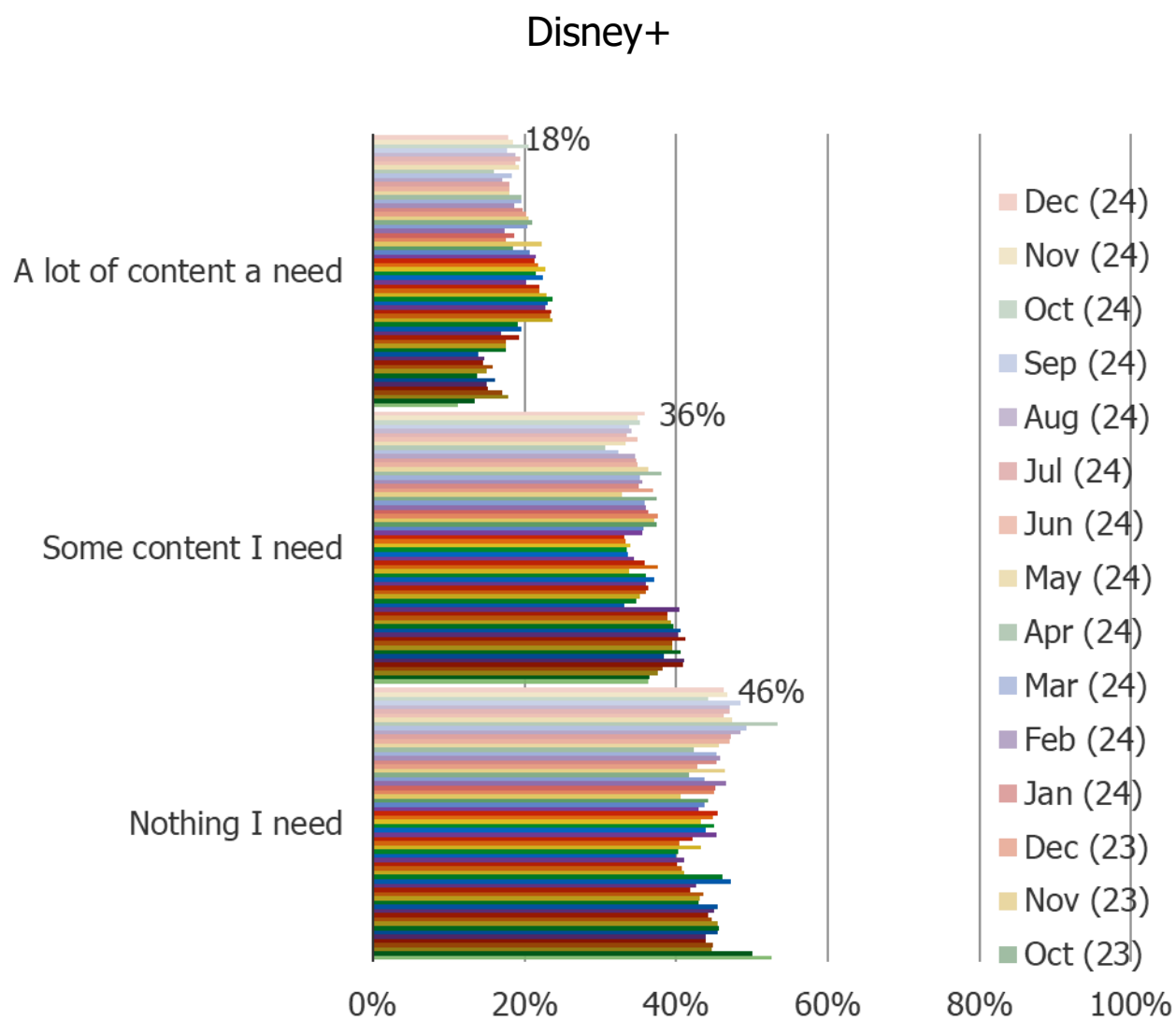
WHAT ARE YOUR EXPECTATIONS FOR THE CONTENT THAT WILL BE ON EACH OF THESE PLATFORMS GOING FORWARD?

Posed to all respondents.



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

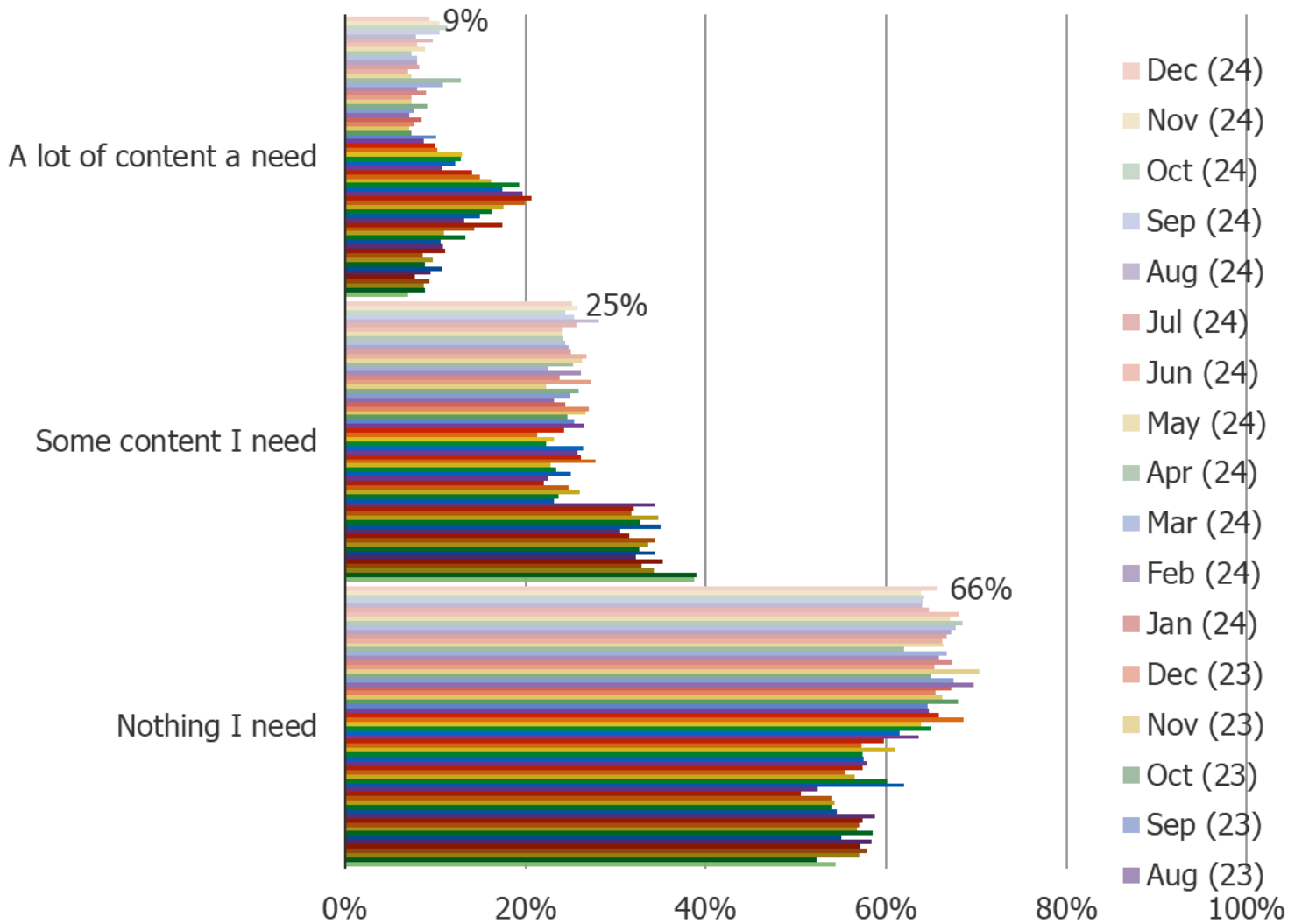
Posed to all respondents.



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

Posed to all respondents.

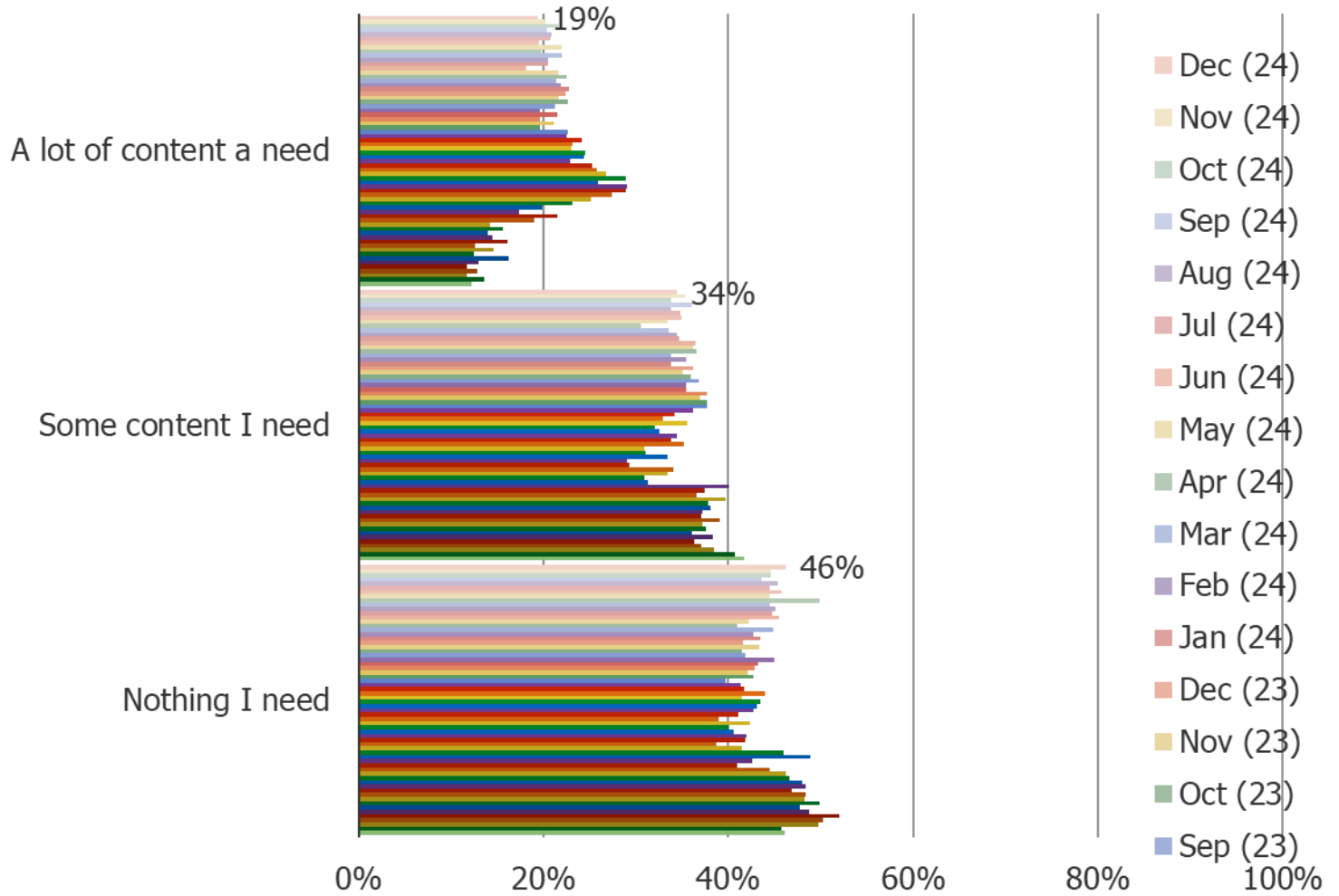
Apple TV+



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

Posed to all respondents.

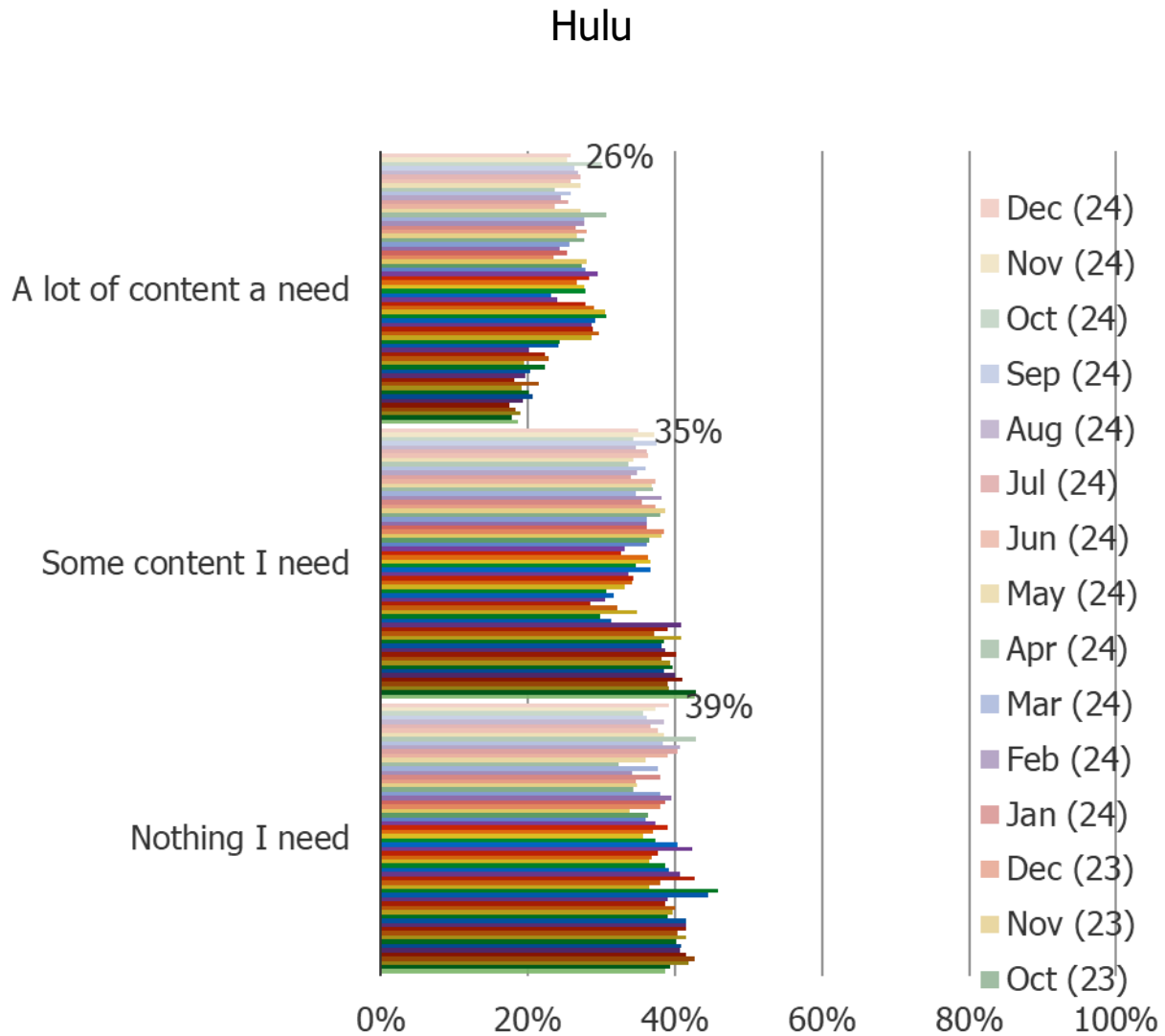
HBO Max





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

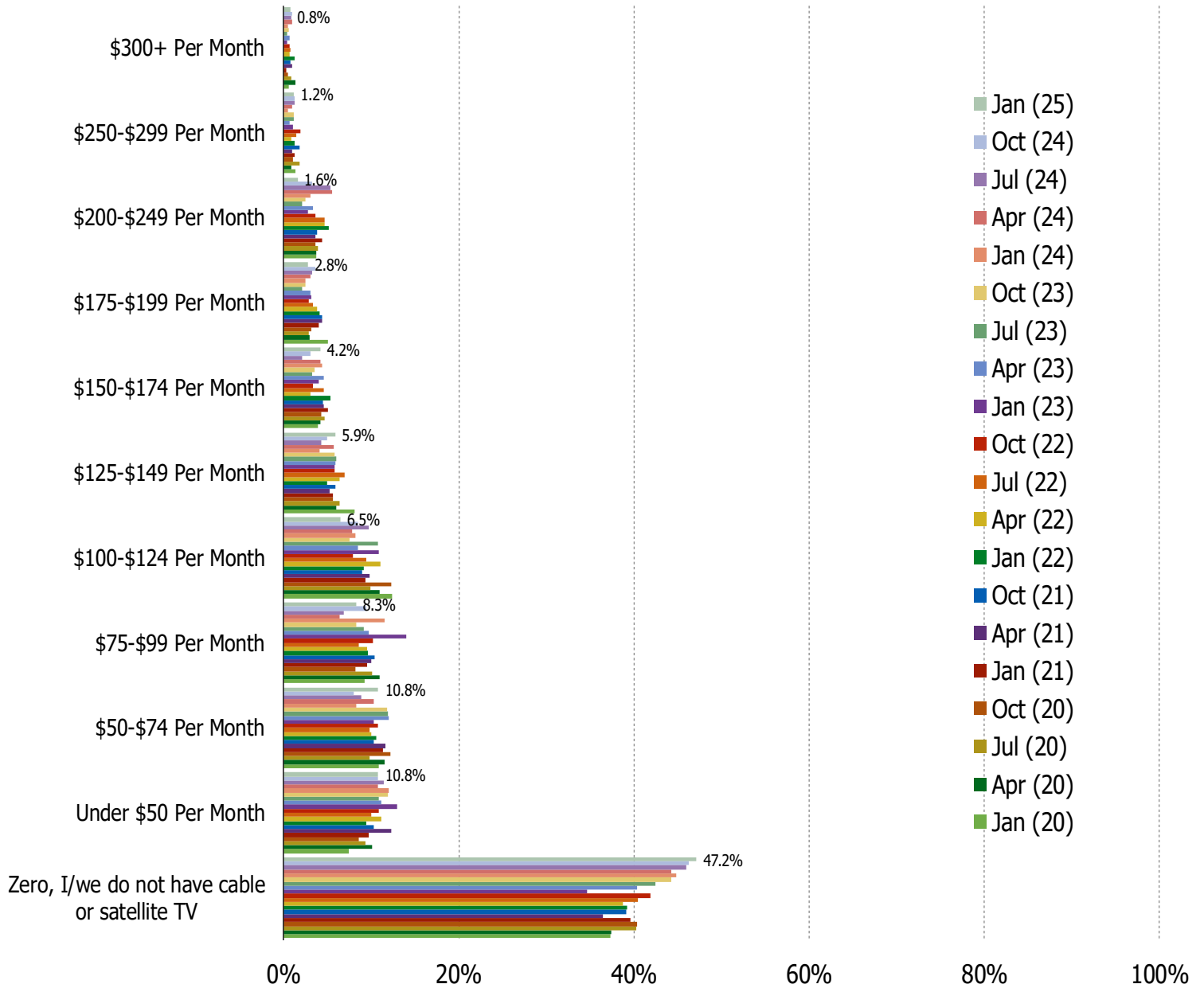
Posed to all respondents.



# SPEND ON CONTENT

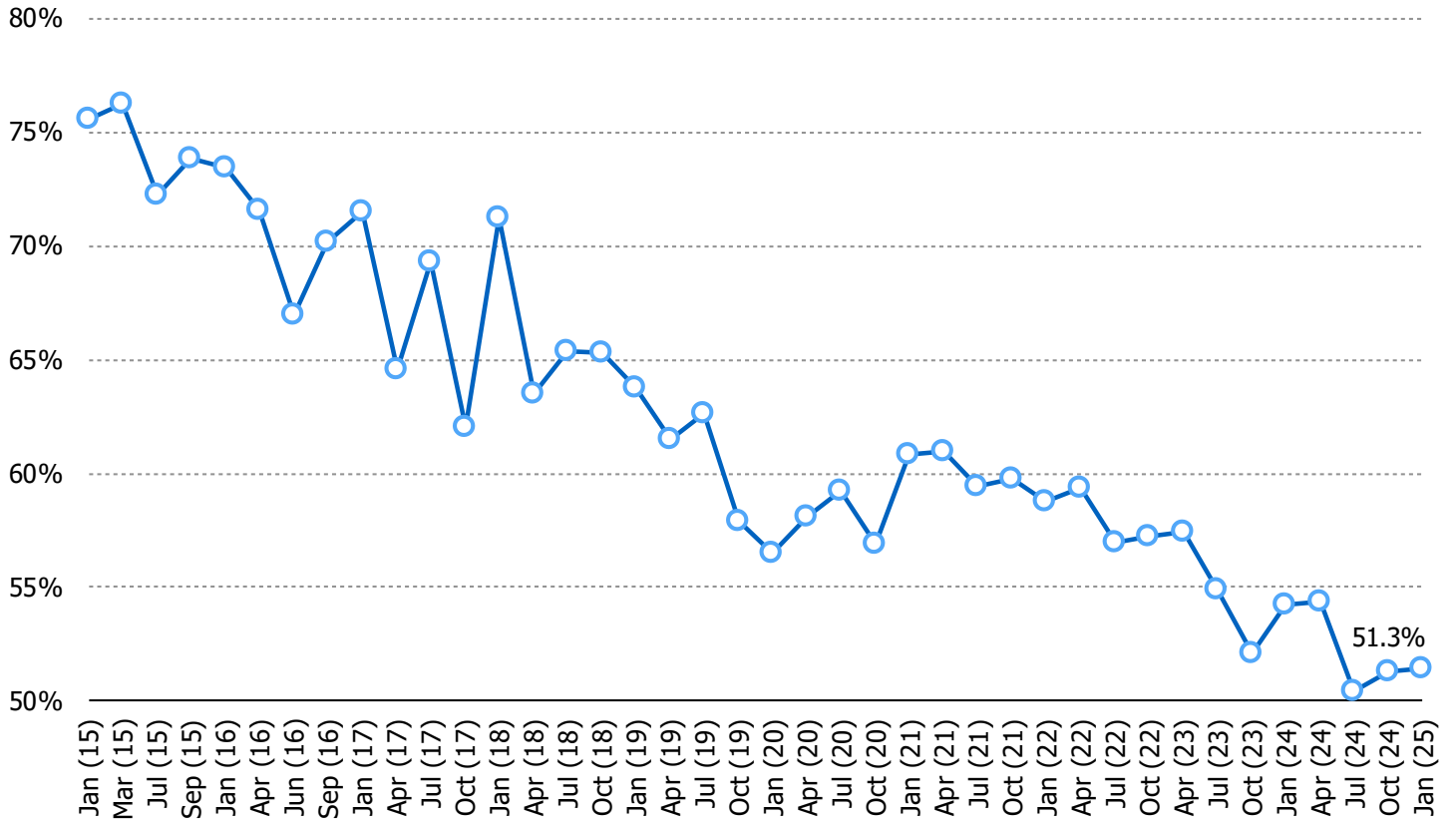
APPROXIMATELY HOW MUCH DO YOU SPEND ON CABLE/SATELLITE TV SERVICES PER MONTH?

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.

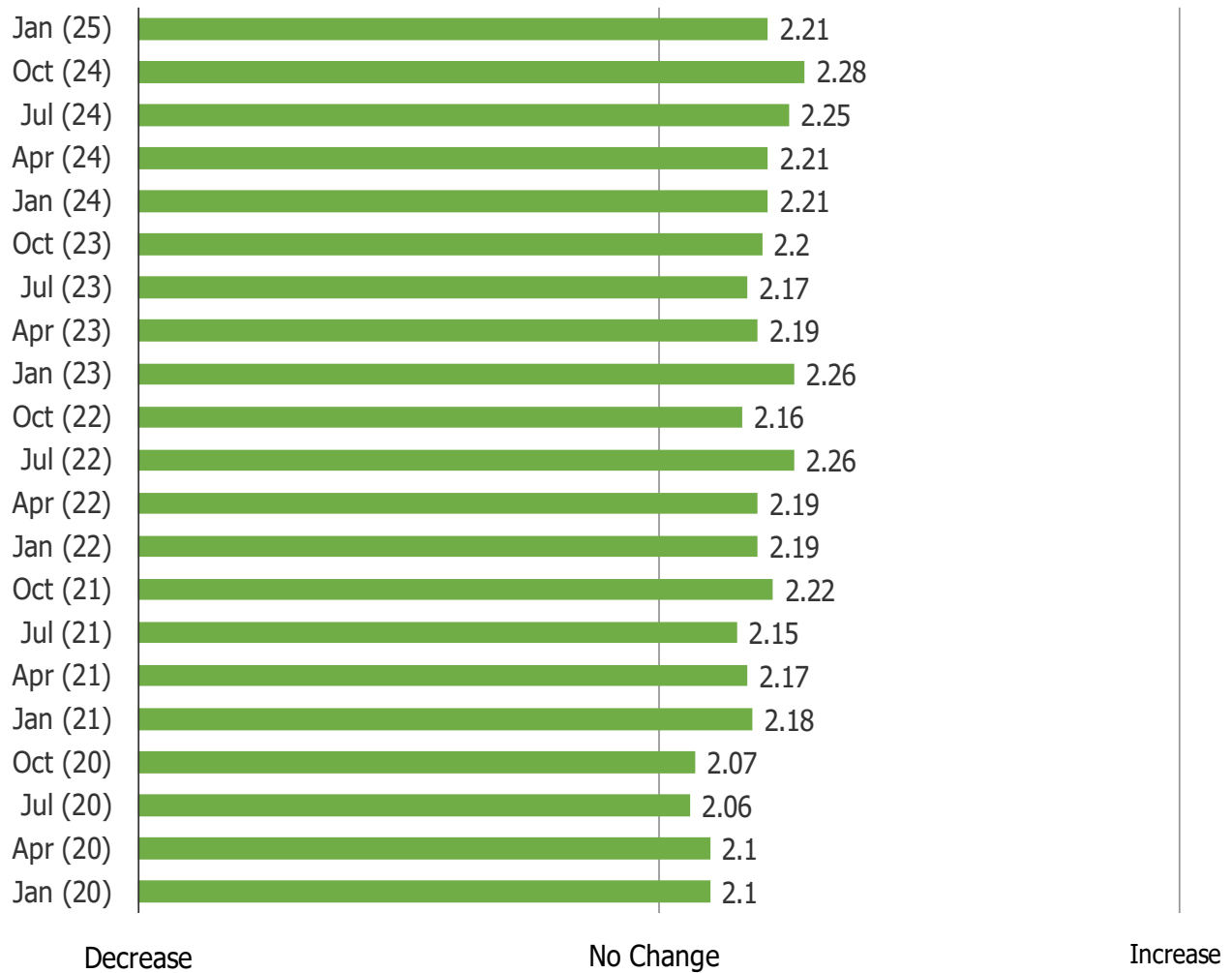


How likely respondents are to be Cable subscribers, broken down by where they ranked Sports out of 5 when it comes to their preferred thing to watch on TV:

- Ranked Sports 1: 61.9% have Cable TV subscription
- Ranked Sports 2: 62.7% have Cable TV subscription
- Ranked Sports 3: 54.6% have Cable TV subscription
- Ranked Sports 4: 43.9% have Cable TV subscription
- Ranked Sports 5: 44.6% have Cable TV subscription

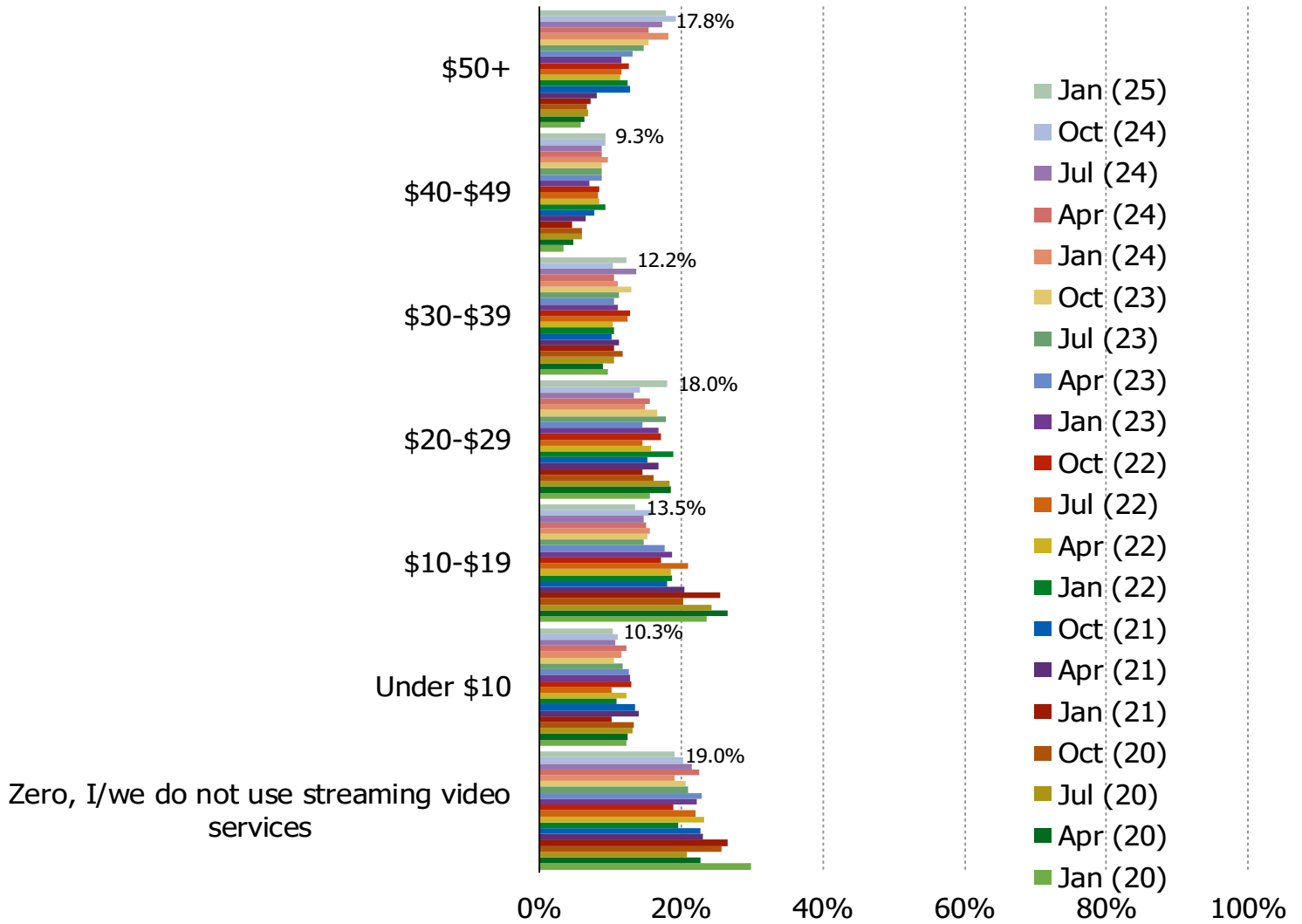
IN THE NEXT YEAR, DO YOU EXPECT THE AMOUNT YOU PAY PER MONTH FOR CABLE OR SATELLITE TV TO CHANGE IN ANY WAY?

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



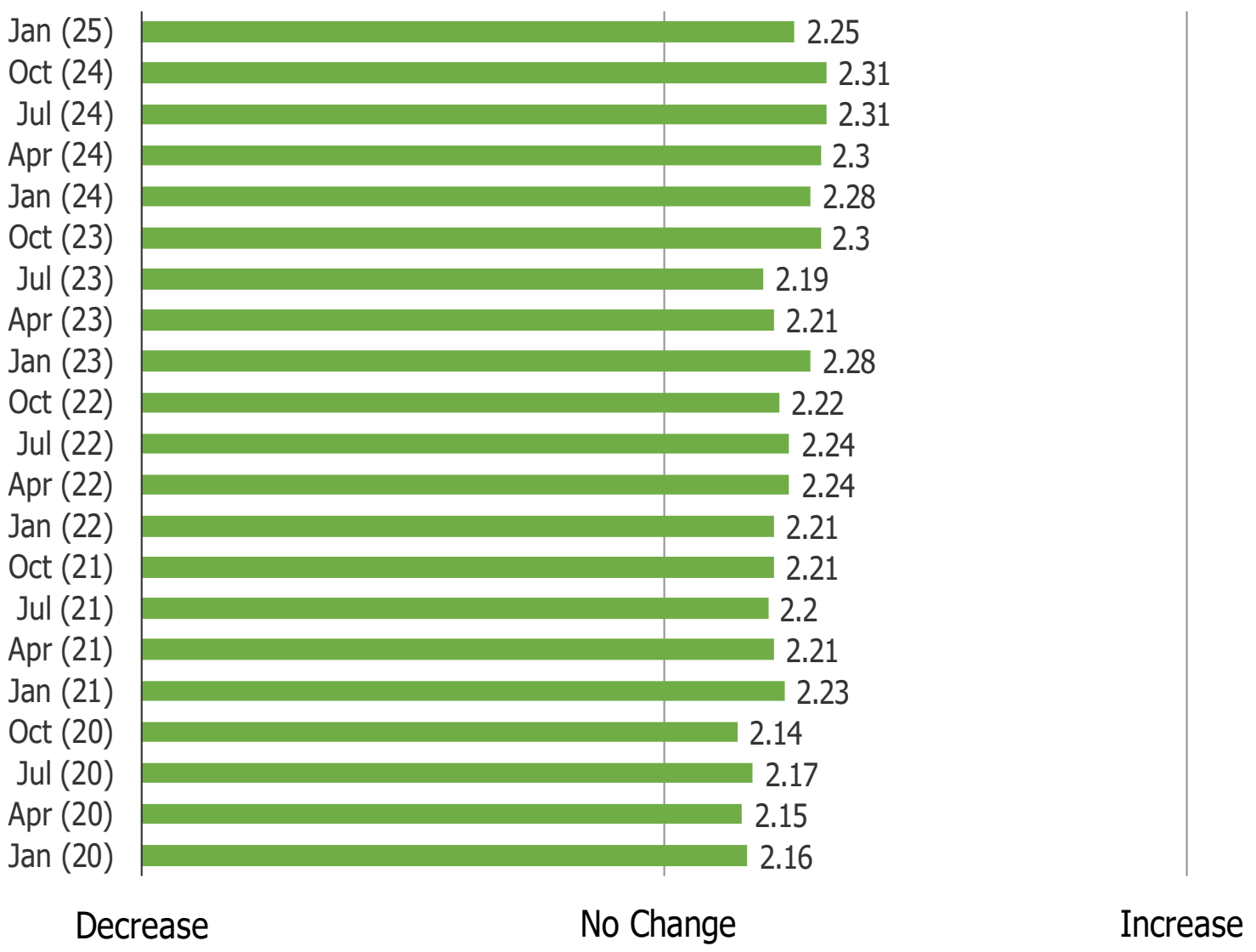
APPROXIMATELY HOW MUCH DO YOU SPEND ON STREAMING VIDEO SERVICES PER MONTH?

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.

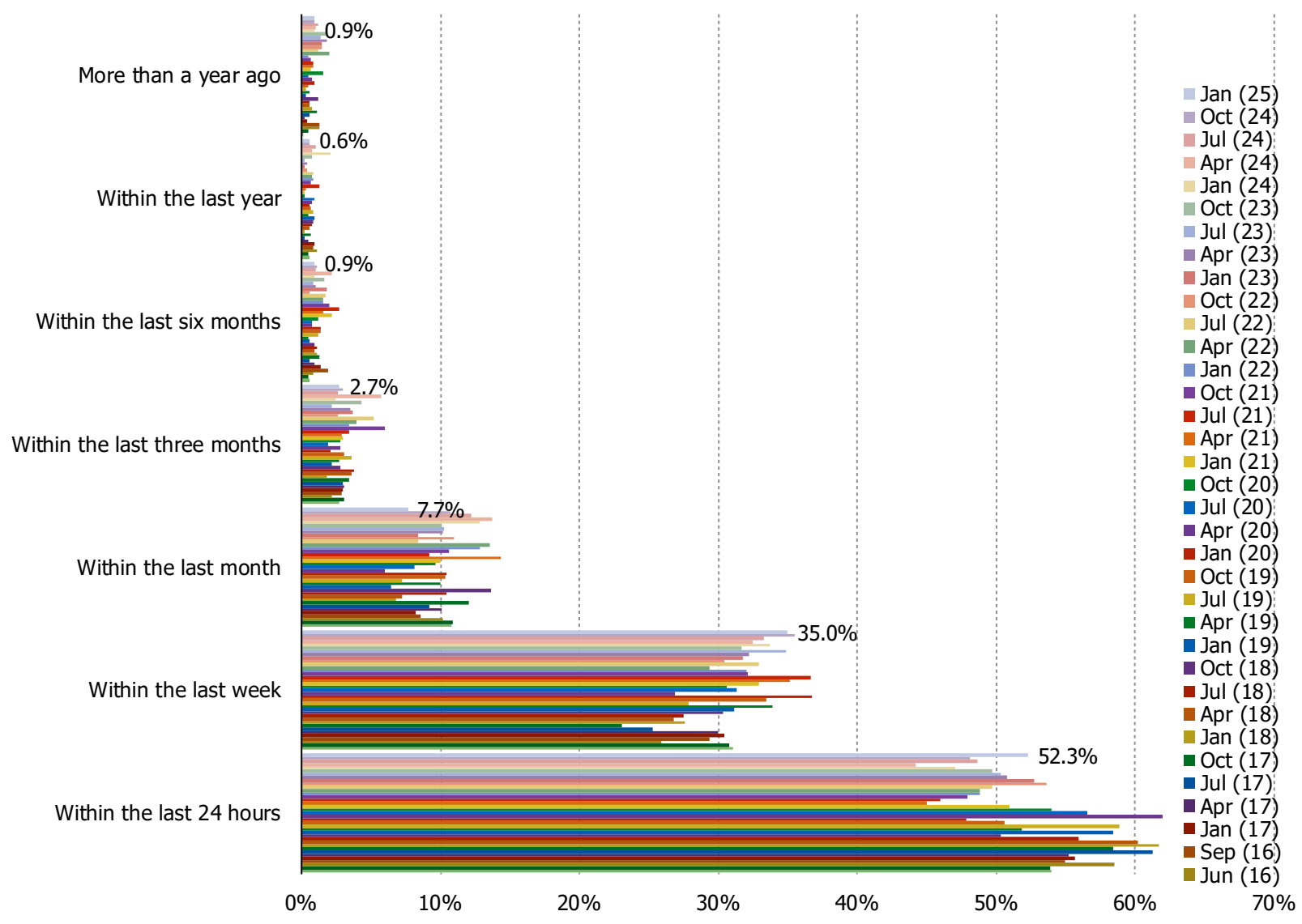


# NETFLIX SUBSCRIBER ENGAGEMENT



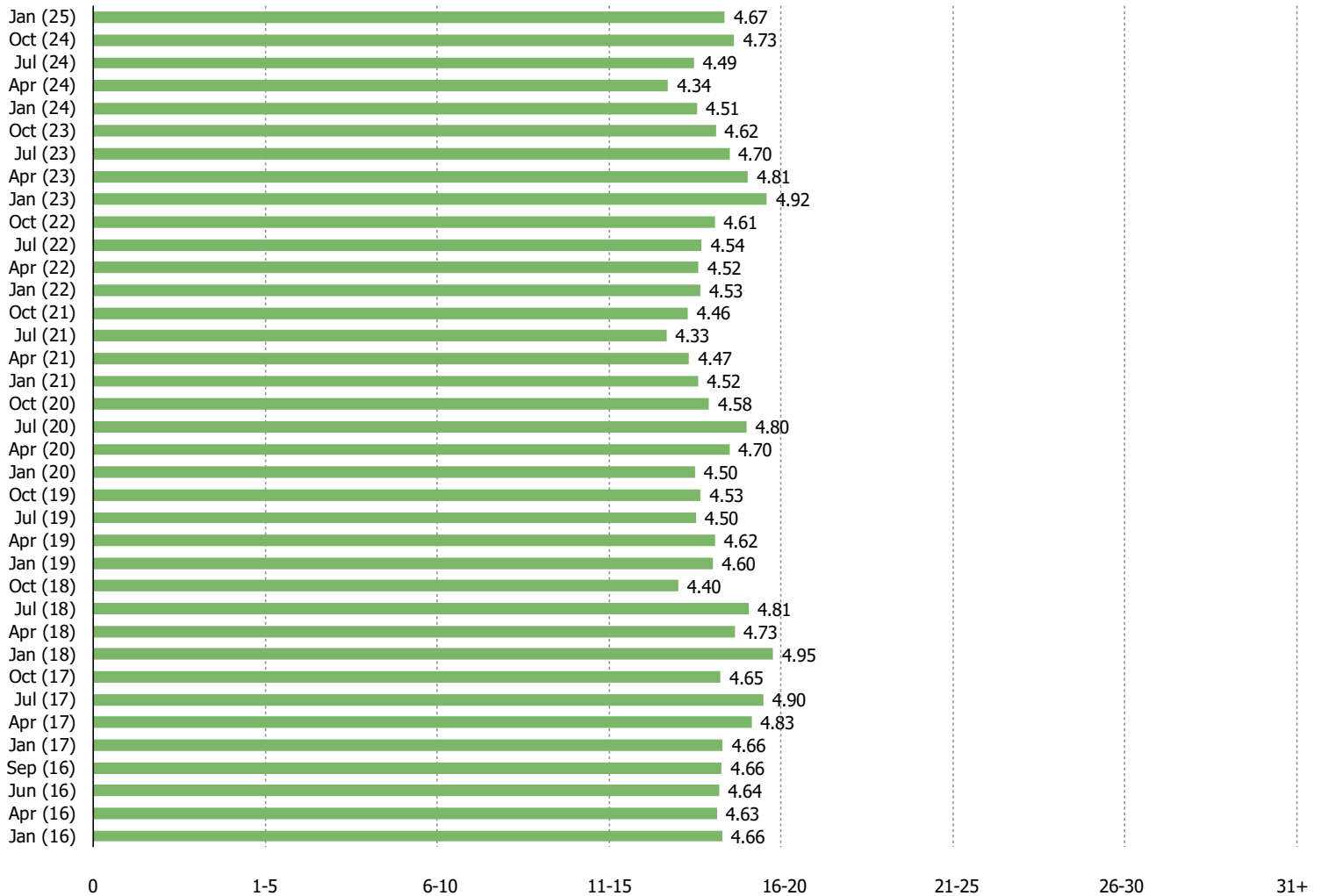
WHEN IS THE LAST TIME YOU WATCHED SOMETHING ON NETFLIX?

Posed to Netflix subscribers.



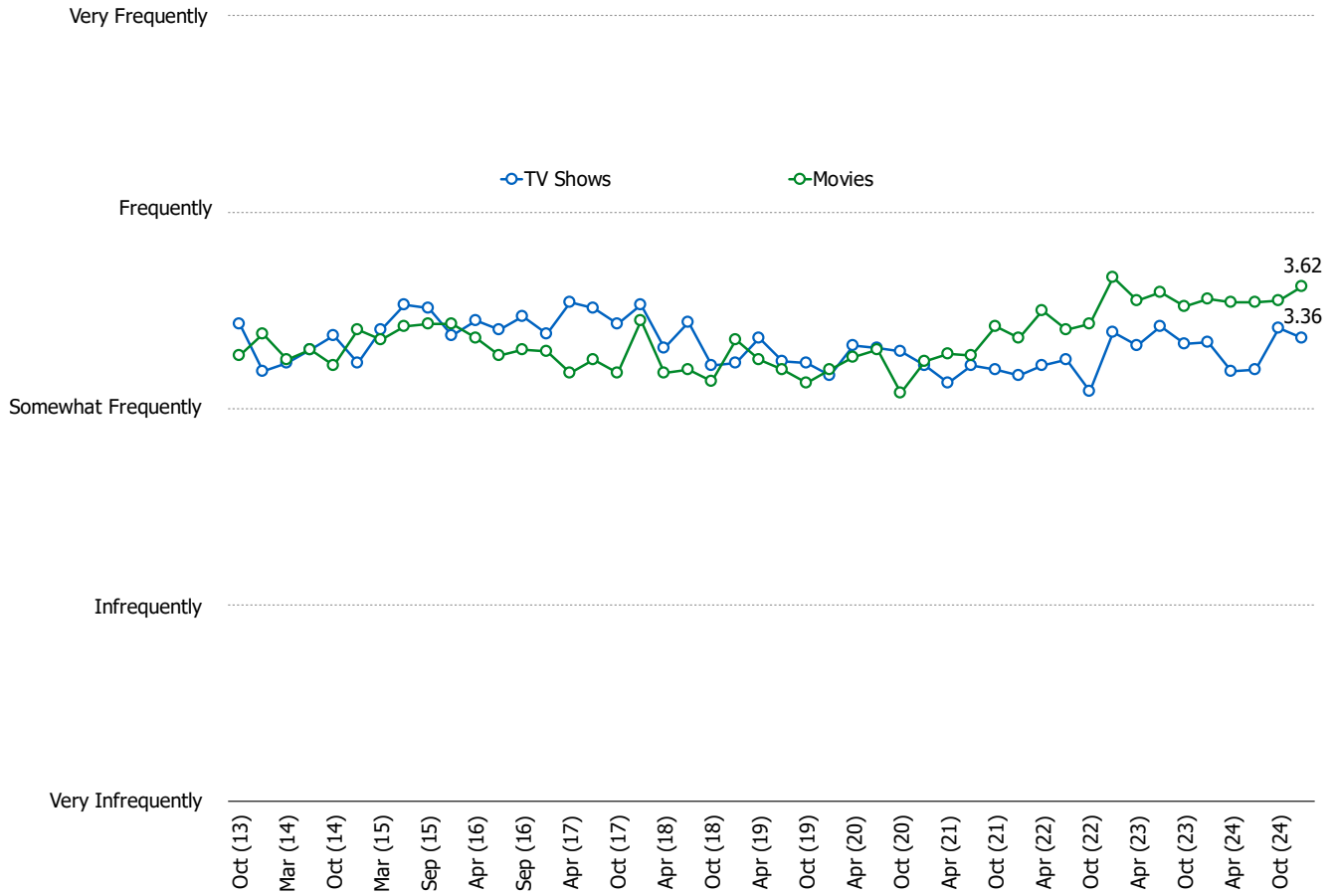
IN AN AVERAGE MONTH, HOW MANY HOURS OF NETFLIX DO YOU WATCH?

Posed to Netflix subscribers.



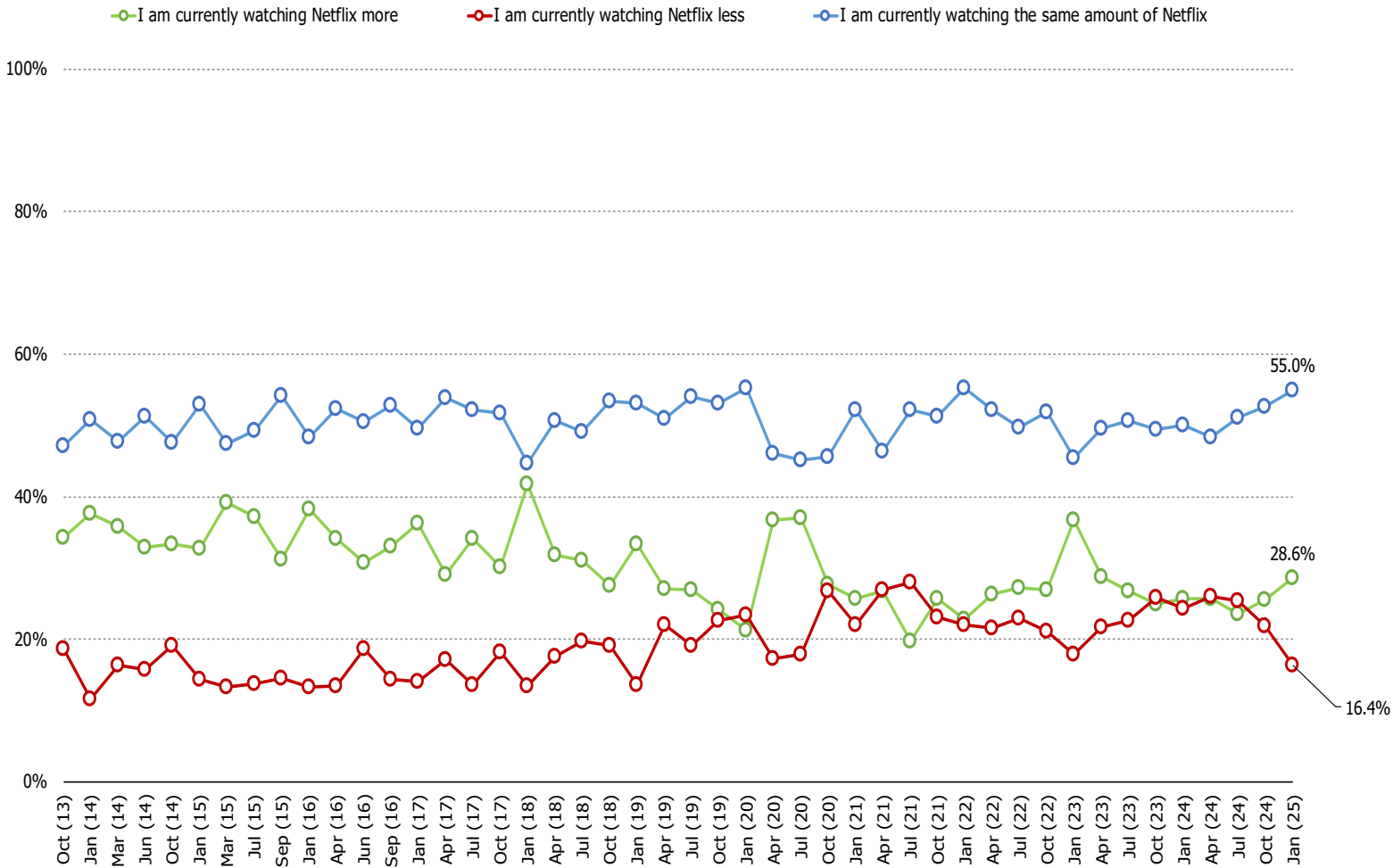
FREQUENCY OF WATCHING TV SHOWS AND MOVIES

Posed to Netflix subscribers.



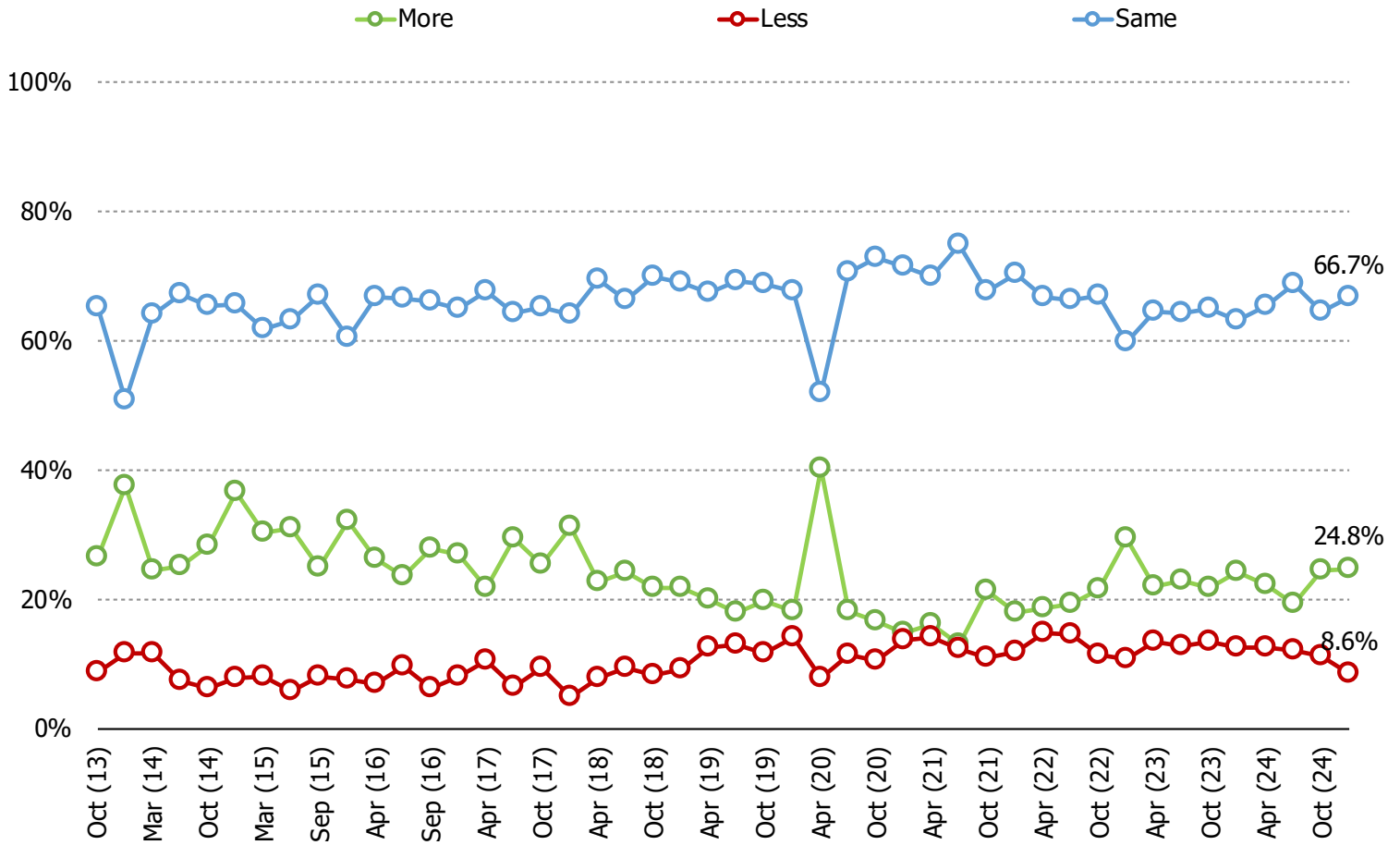
PLEASE COMPARE YOUR CURRENT USAGE OF NETFLIX WITH YOUR USAGE 3-6 MONTHS AGO.

Posed to Netflix subscribers.



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

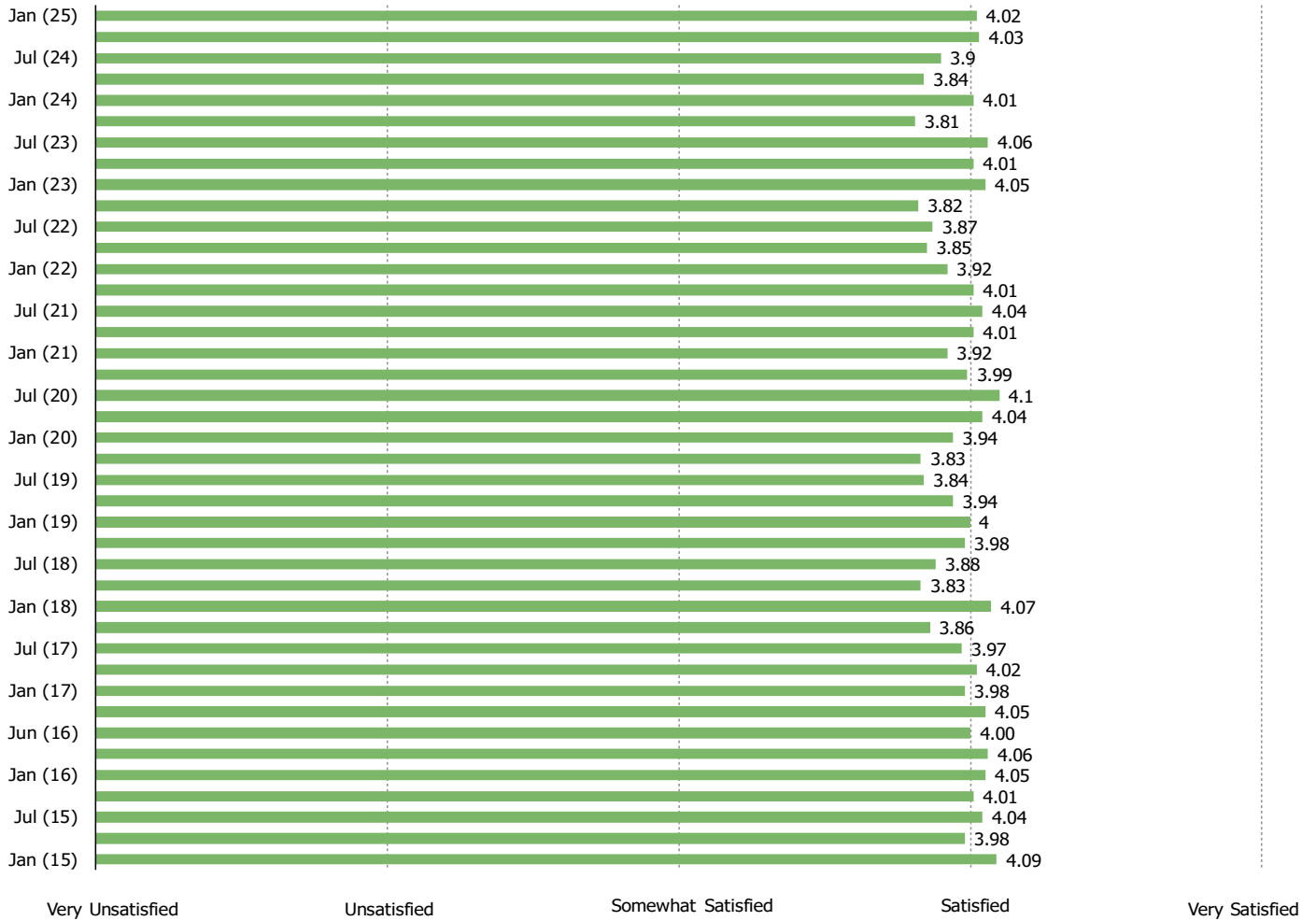
Posed to Netflix subscribers.



# NETFLIX PRICING POWER

SATISFACTION WITH THE VALUE THEY RECEIVE FOR THE MONEY WITH NETFLIX

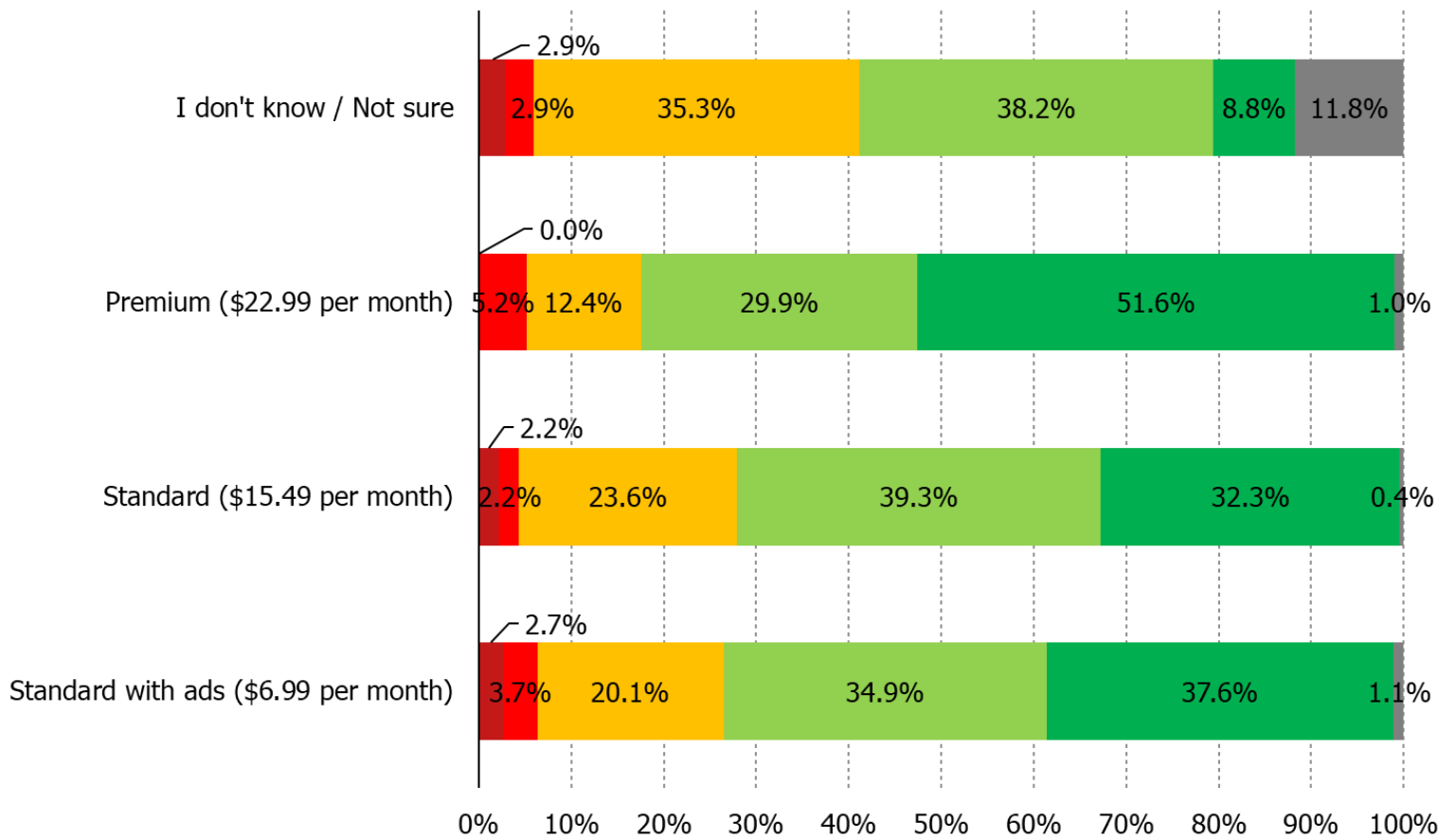
Posed to Netflix subscribers.



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

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

Very Unsatisfied    Unsatisfied    Somewhat Satisfied    Satisfied    Very Satisfied    N/A

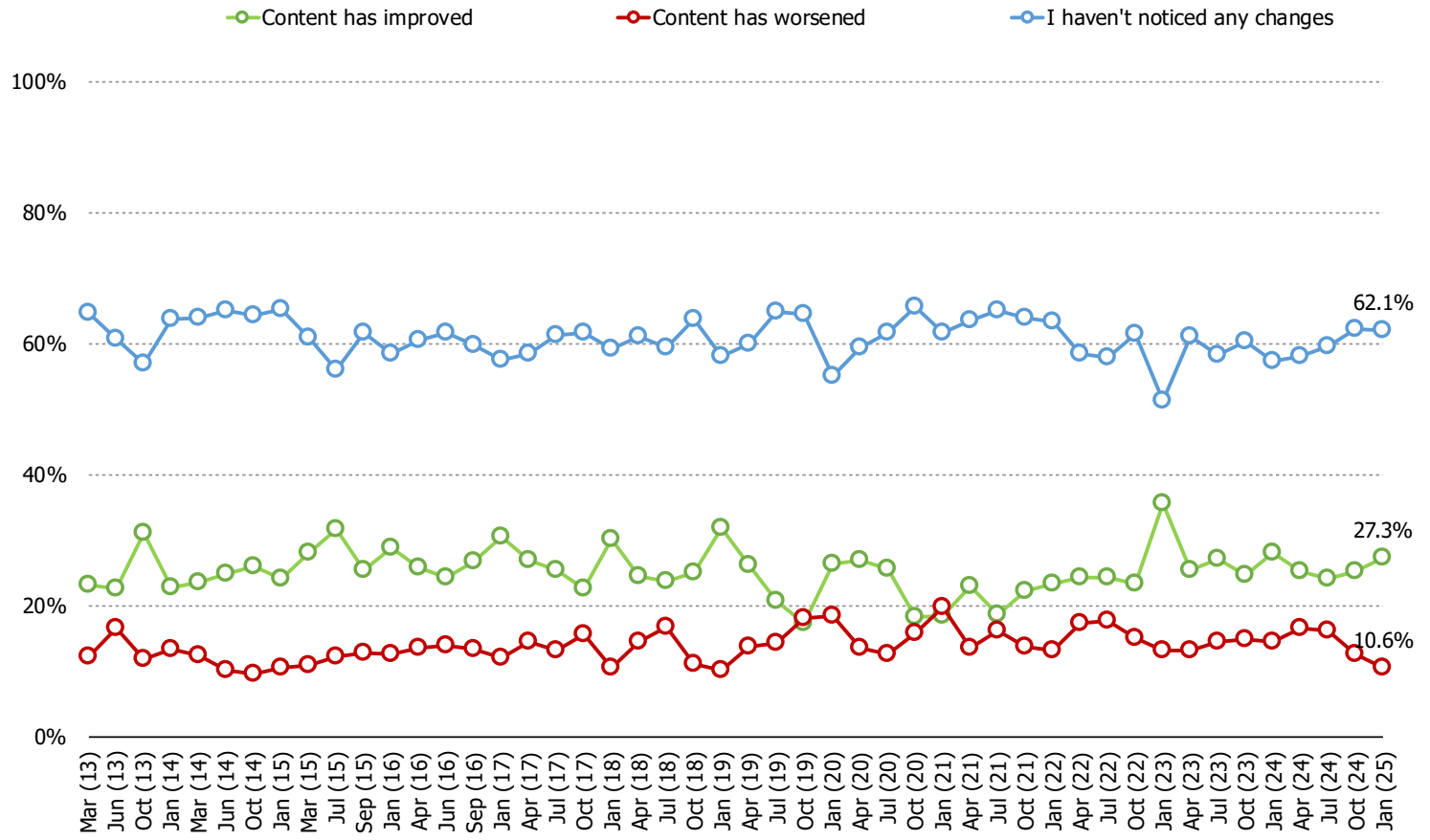




# NETFLIX CONTENT

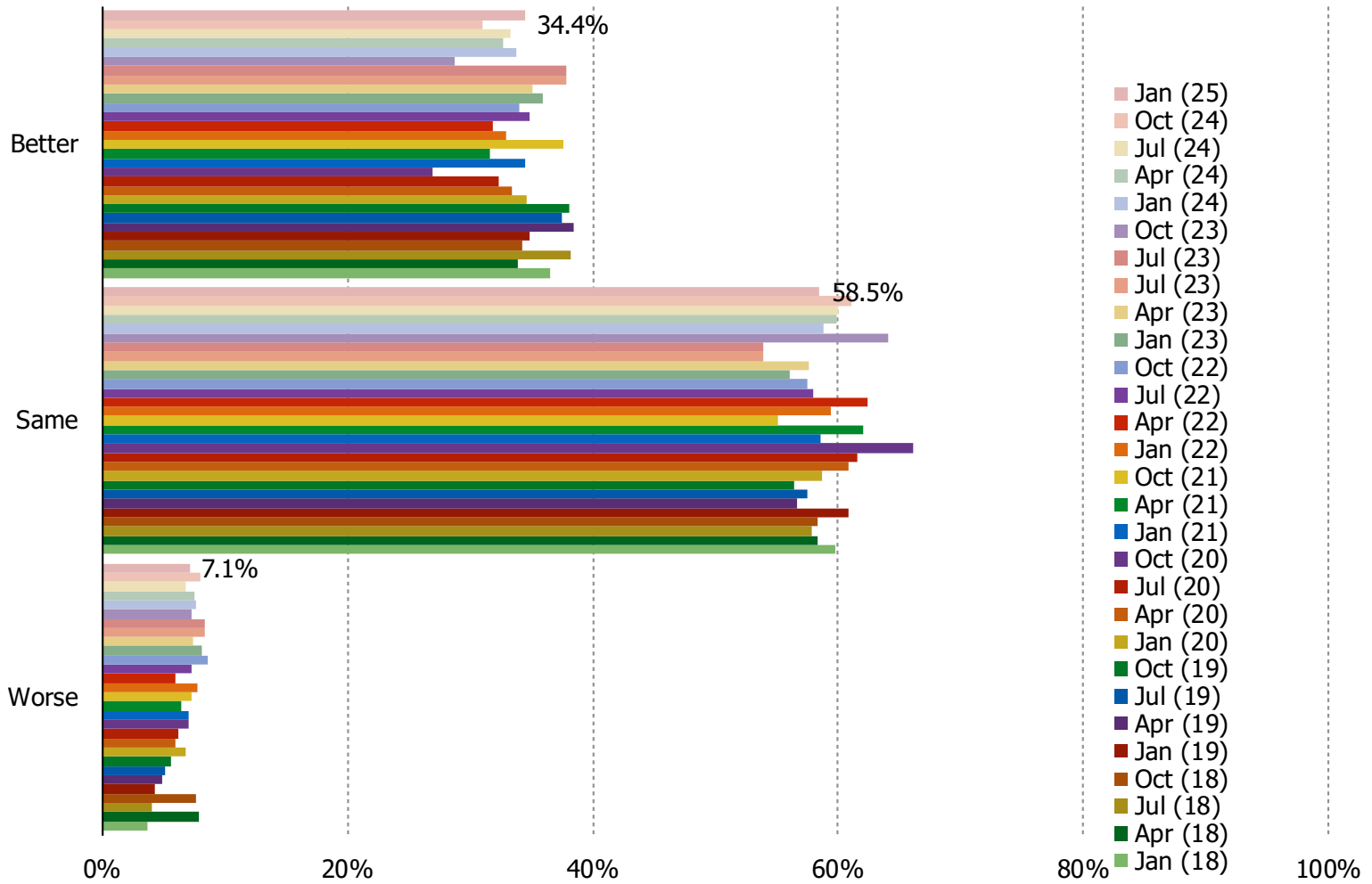
HAVE YOU NOTICED ANY CHANGES TO NETFLIX'S CONTENT OVER THE LAST SIX MONTHS?

Posed to Netflix subscribers.



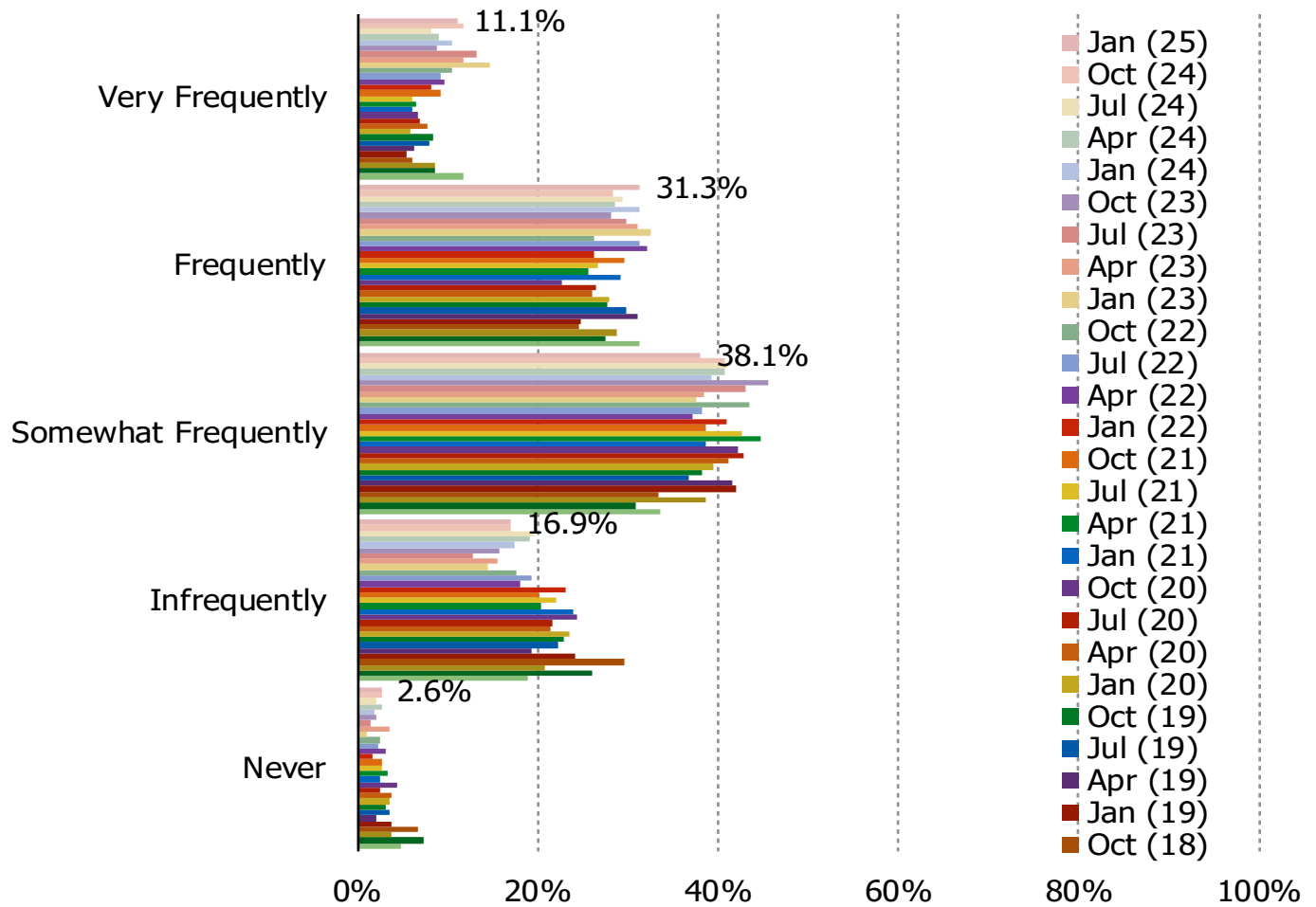
HOW DO YOU COMPARE NETFLIX ORIGINAL CONTENT SHOWS AGAINST SHOWS YOU VIEW ON OTHER NETWORKS OR SERVICES?

Posed to Netflix subscribers.



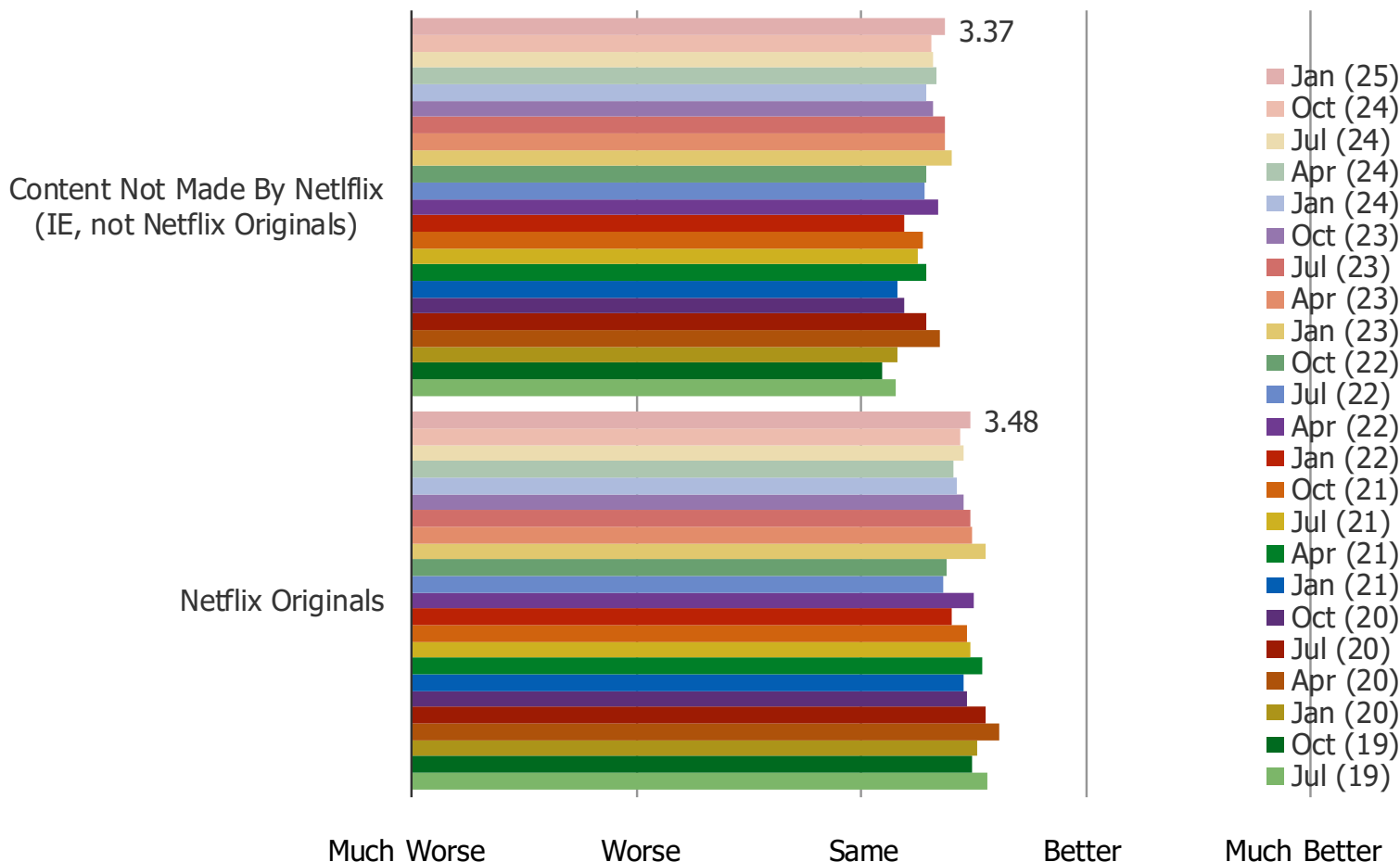
HOW OFTEN DO YOU WATCH NETFLIX ORIGINAL CONTENT SHOWS?

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?

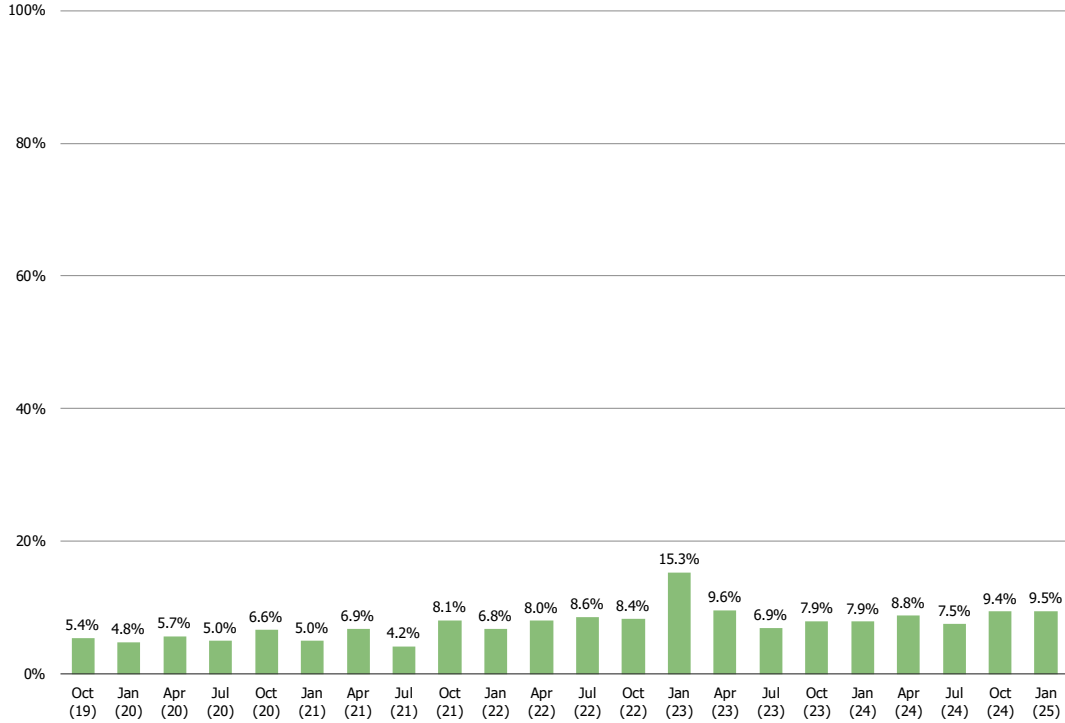
Posed to Netflix subscribers.



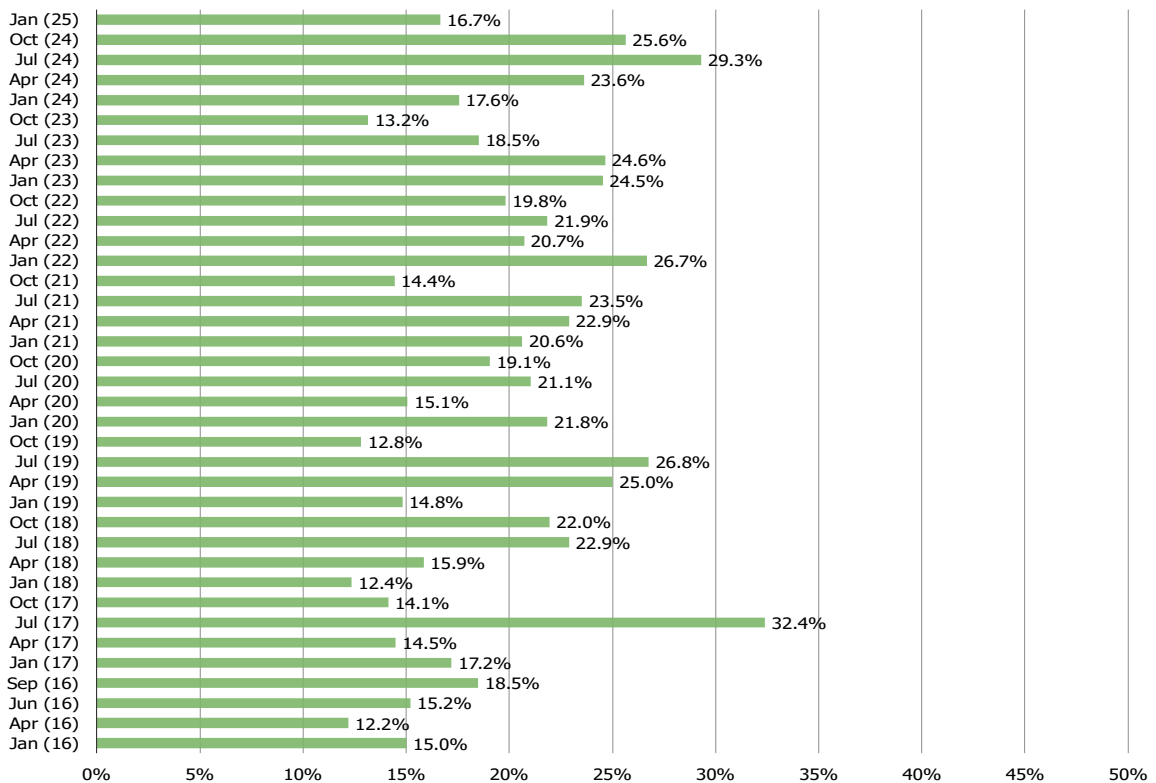
## CYCLING IN AND OUT OF NETFLIX

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.



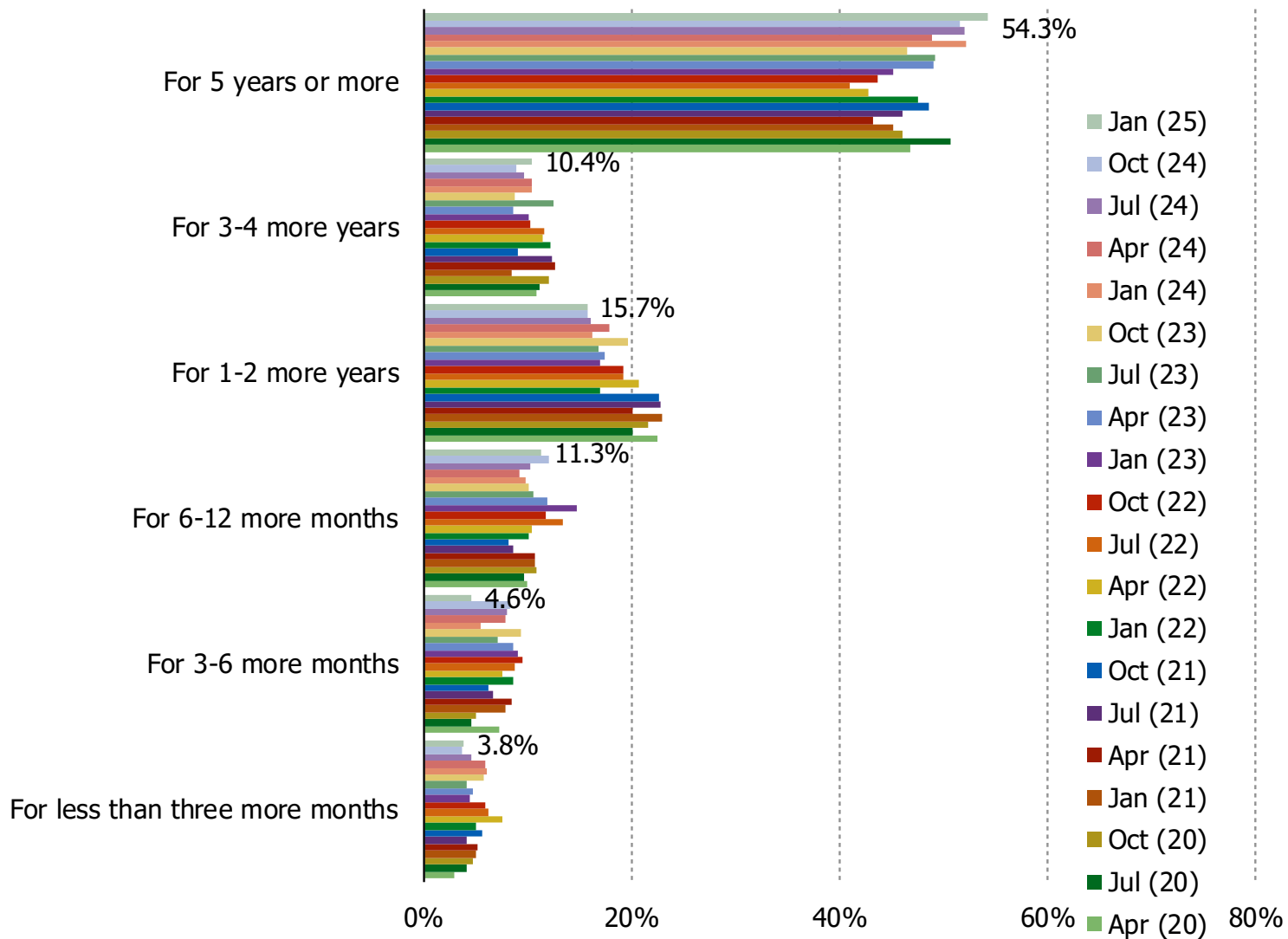
## NFLX CHURN





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.

