

Bespoke Survey Research

April 2025

Streaming Video Survey

Volume 48 | Quarterly Survey 1,000 US Consumers Balanced To Census Tickers Covered: NFLX, DIS, T, CMCSA.

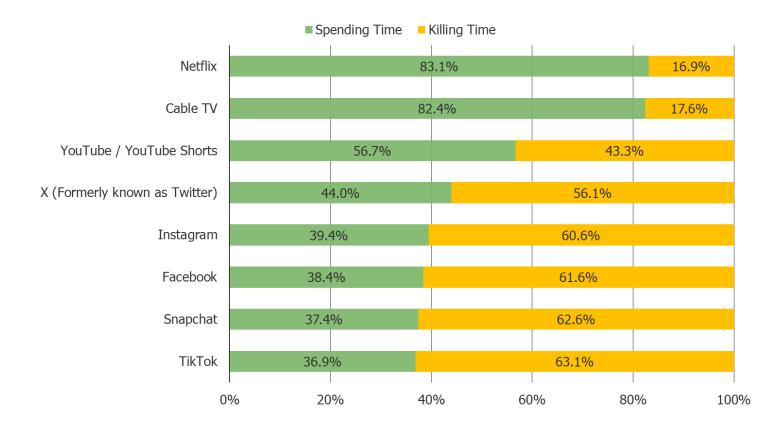
Key Takeaways:

	In March, Ted Sarandos was quoted in an article saying that they are more in the business of "spending time" and suggested that peers, like YouTube, were more in the business of providing content for "killing time." We asked customers of a range of platforms about this. Netflix customers were the most likely to characterize the time as "spending time", at 83.1%). Cable TV was second at 82.4% "spending time." YouTube came in third at 56.7% spending time vs. 43.3% "killing time." Social platforms were all more likely to be considered "killing time."
_	The share of consumers in our survey who said they are Cable TV subscribers declined q/q and dipped below 50% for the first time in our survey. That said, the share of Cable subs who intend to cancel in the next 6-12 month declined q/q as well.
	Among the broader audience, consumers are more likely to think signing up for multiple streaming services is better than Cable TV (for quality, ease of use, price/value, and content).
ב	TV content and movies remain the most important to consumers, and a leg higher in importance rankings compared to live news, sports content, and social media content.
	Over the history of our time series, feedback around account sharing and around the ad-supported tier has been positive and improved. More recently, the mix of respondents saying they are on the adsupported tier declined slightly and sentiment toward number of commercials they see has worsened. That said, it is more or a slight pull back from historical trends that increased/got more positive over time than constituting negative feedback.
	Though Cable TV is not viewed as being as good a value by customers as alternatives, the share of customers who view it to be a good value has increased over time. Of all the content platforms / avenues shown to consumers, Cable TV is the most likely to be viewed as a "need to have."
1	Netflix subscriber engagement trends are constructive / in-line with recent waves.
)	The share of Netflix customers who said they are considering cancelling had been declining, but ticked back up a bit q/q. For the most part, though, consumers seem to have absorbed the price increases and revised higher the price they'd be willing to pay for Netflix.

NEW QUESTIONS THIS WAVE

IF YOU HAD TO CHOOSE, DO YOU VIEW THE TIME WATCHING VIDEO CONTENT ON THE FOLLOWING AS...

Posed to all respondents who have watched any kind of video content in the past month on the below.



Relevant Quote From Ted Sarandos: (March 2025)

"We compete with them, along with everybody else, for entertainment, time and money. So certainly we're competing with them for advertising dollars and professional content. So for that part of YouTube, we definitely compete. For the other parts we definitely don't," he continued. "I think there's a part of the creator community that's snackable consumption. There's a difference between killing time and spending time. So we're in the kind of how you spend time business moreso."

	N=
Netflix	467
YouTube / YouTube Shorts	621
TikTok	309
Facebook	495
Snapchat	139
Instagram	378
Cable TV	244
X (Formerly known as Twitter)	157

CABLE TV QUESTIONS

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

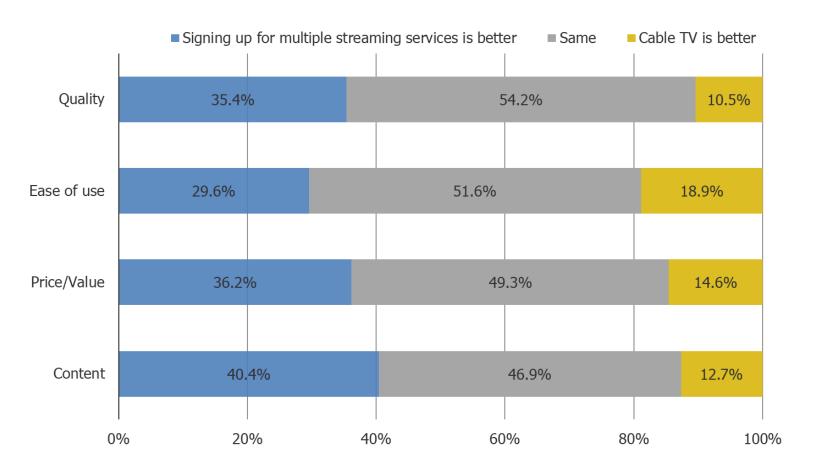
Posed to respondents who watch video content at home.



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:

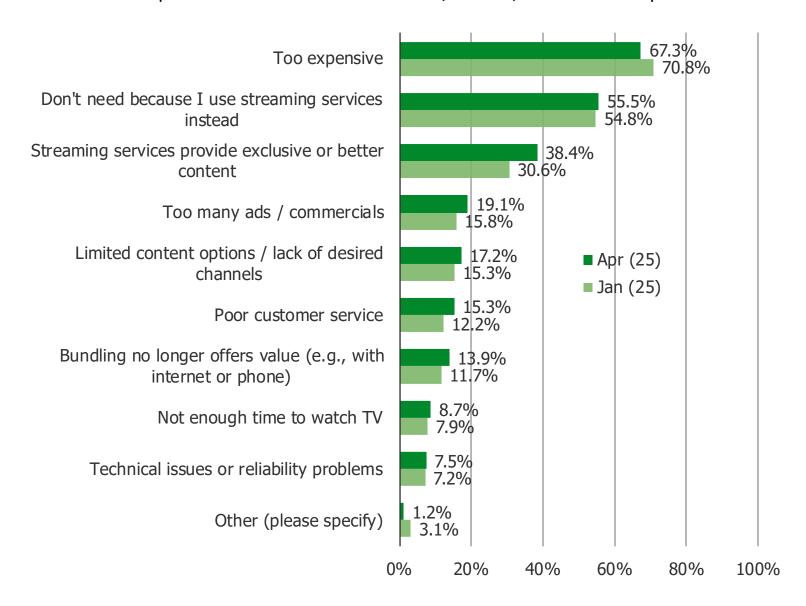
Ranked Sports 1: 61.9% have Cable TV subscription Ranked Sports 2: 62.7% have Cable TV subscription Ranked Sports 3: 54.6% have Cable TV subscription Ranked Sports 4: 43.9% have Cable TV subscription Ranked Sports 5: 44.6% have Cable TV subscription

WHICH IS BETTER WHEN IT COMES TO THE FOLLOWING...



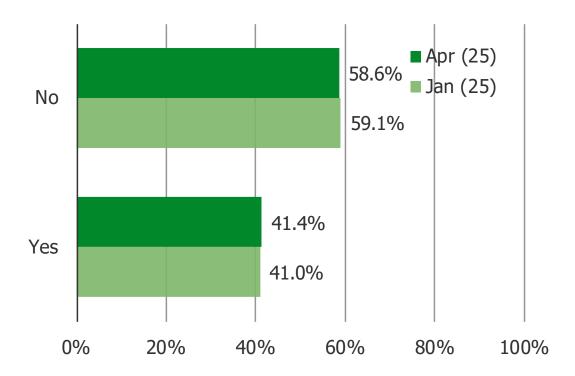
WHICH OF THE FOLLOWING BEST DESCRIBES WHY YOU DON'T HAVE A CABLE, SATELLITE, OR TELCO TV SUBSCRIPTION? SELECT ALL THAT APPLY

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



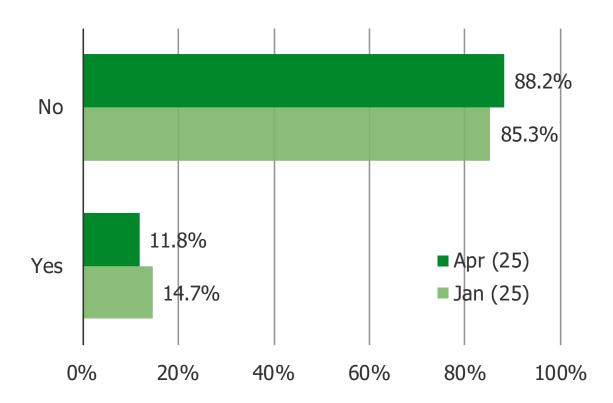
DO FREE STREAMING SUBSCRIPTIONS INCLUDED IN YOUR PAY TV PACKAGE LOWER YOUR LIKELIHOOD OF CANCELLING?

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



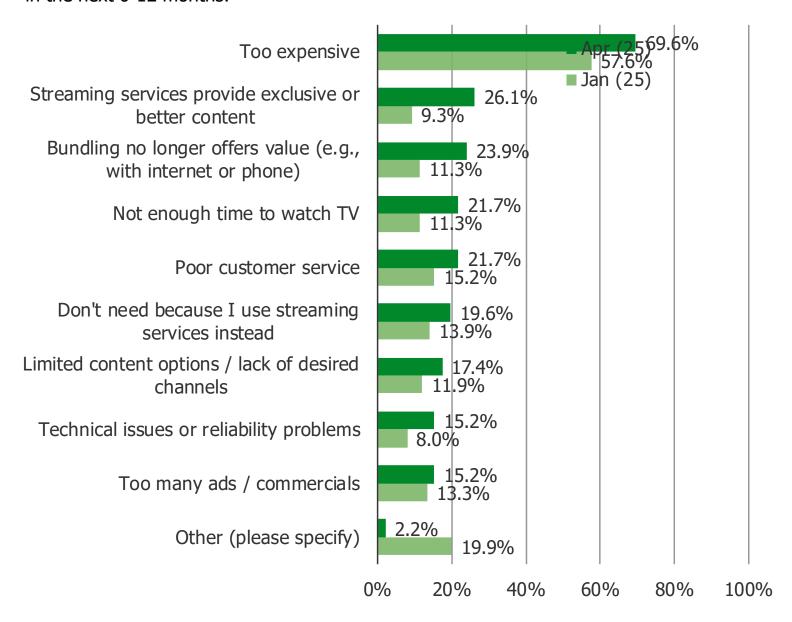
DO YOU INTEND TO CANCEL YOUR CABLE, SATELLITE, OR TELCO TV SUBSCRIPTION IN THE NEXT 6-12 MONTHS?

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



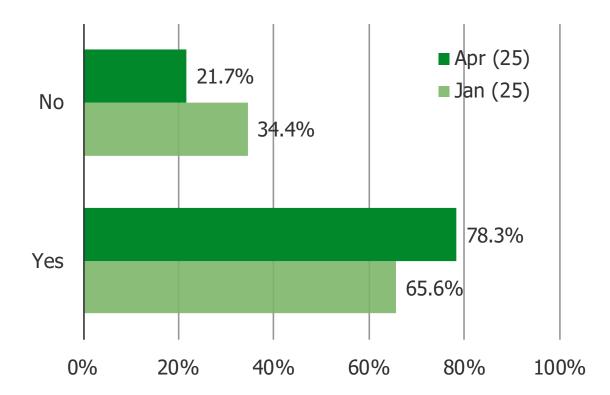
WHAT ARE THE REASONS FOR WHY YOU INTEND TO CANCEL CABLE, SATELLITE, OR TELCO TV SUBSCRIPTION?

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



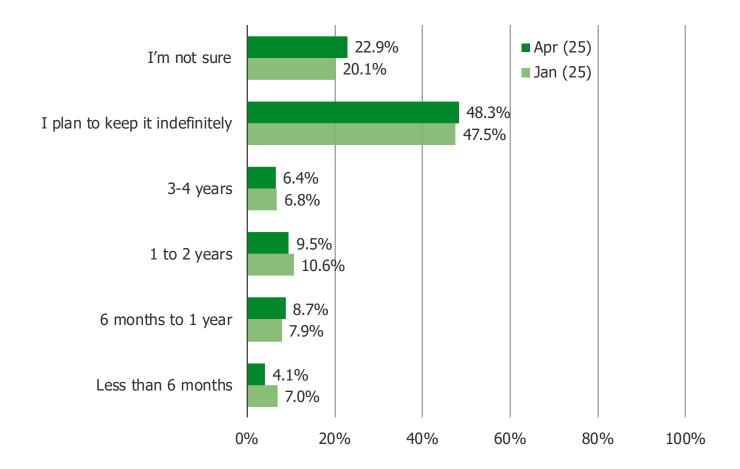
IF YOU CANCEL, WILL YOU USE A STREAMING SERVICE THAT PROVIDES LIVE TV AND ON-DEMAND CONTENT OVER THE INTERNET (E.G., YOUTUBE TV, HULU + LIVE TV, PHILO, SLING, FUBOTV, ETC.

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



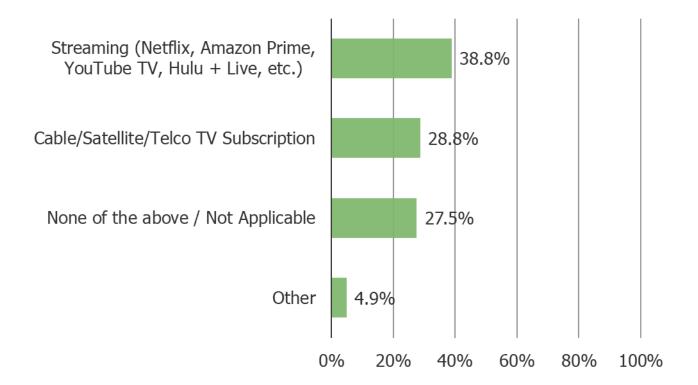
FOR HOW MUCH LONGER DO YOU THINK YOU WILL HAVE A CABLE, SATELLITE, OR TELCO TV SUBSCRIPTION?

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



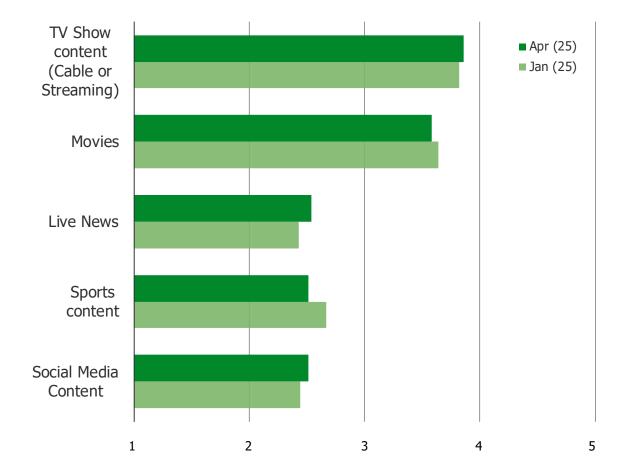
WHAT IS YOUR PREFERRED METHOD FOR WATCHING SPORTS?

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



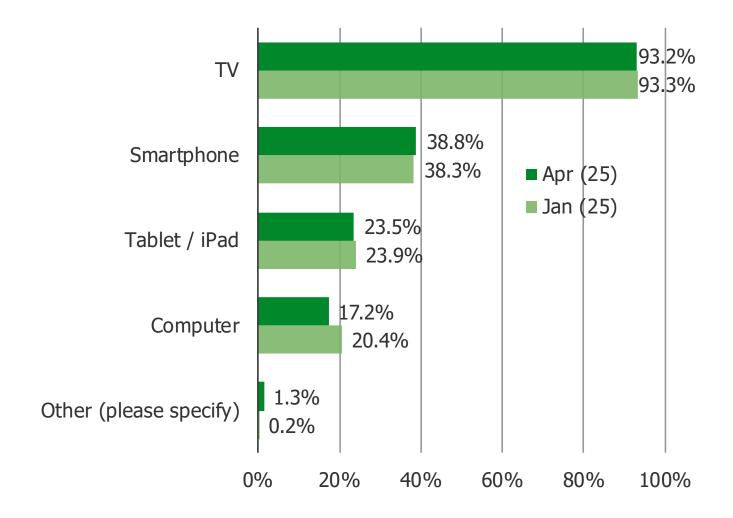
PLEASE RANK WHAT TYPE OF CONTENT YOU PREFER, FROM MOST AT THE TOP TO LEAST AT THE BOTTOM.

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

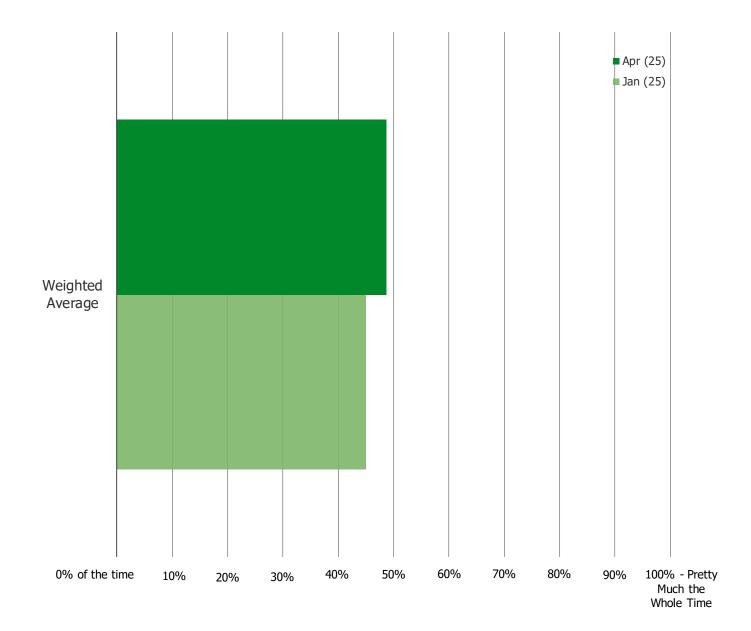


HOW DO YOU WATCH NETFLIX? SELECT ALL THAT APPLY

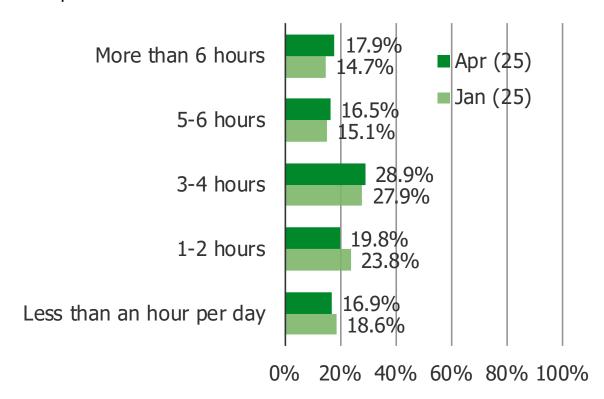
Posed to all Netflix subscribers.



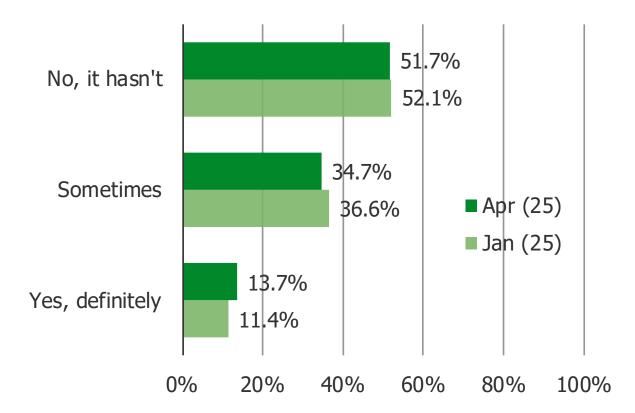
WHEN YOU ARE WATCHING TV, APPROXIMATELY WHAT PERCENTAGE OF THE TIME ARE YOU ALSO LOOKING AT SOMETHING ON YOUR SMARTPHONE?



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

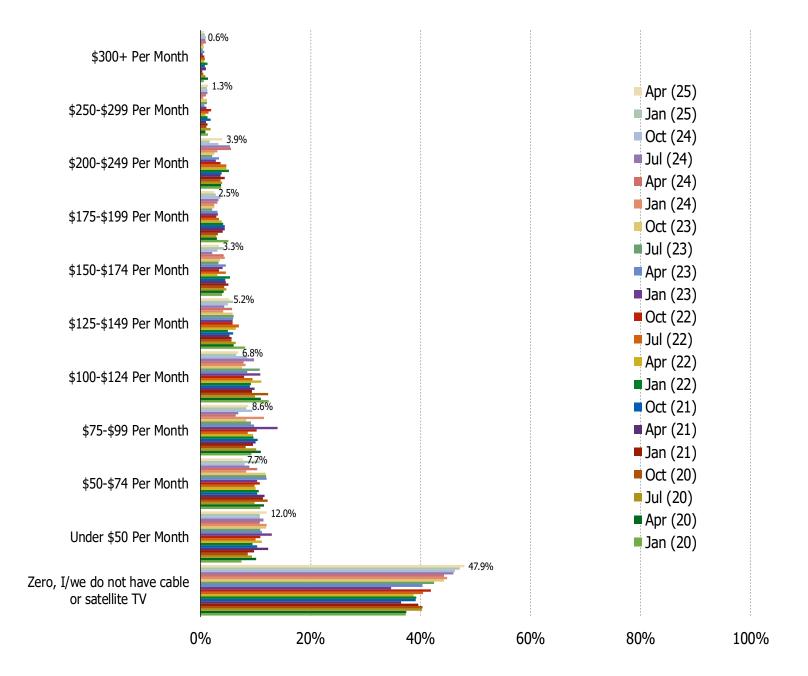


IN YOUR OPINION, HAS THE CONTENT YOU WATCH ON YOUR PHONE DIMINISHED THE IMPORTANCE OF WHAT YOU ARE WATCHING ON TV?



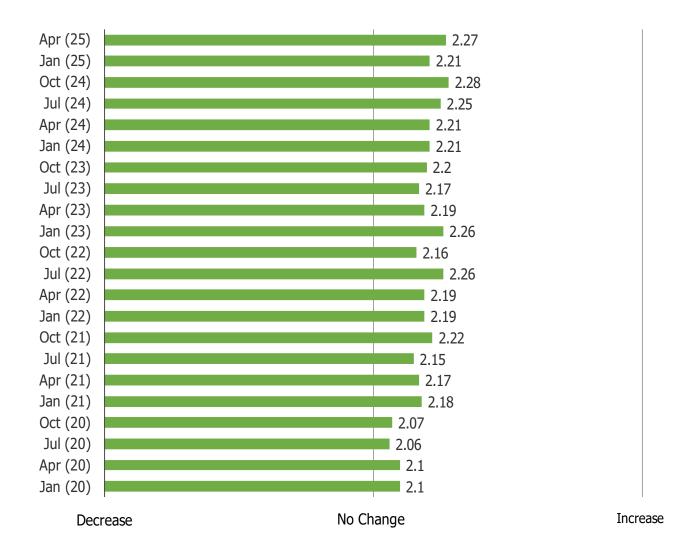
APPROXIMATELY HOW MUCH DO YOU SPEND ON CABLE/SATELLITE TV SERVICES PER MONTH?

Posed to respondents who watch video content at home.



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

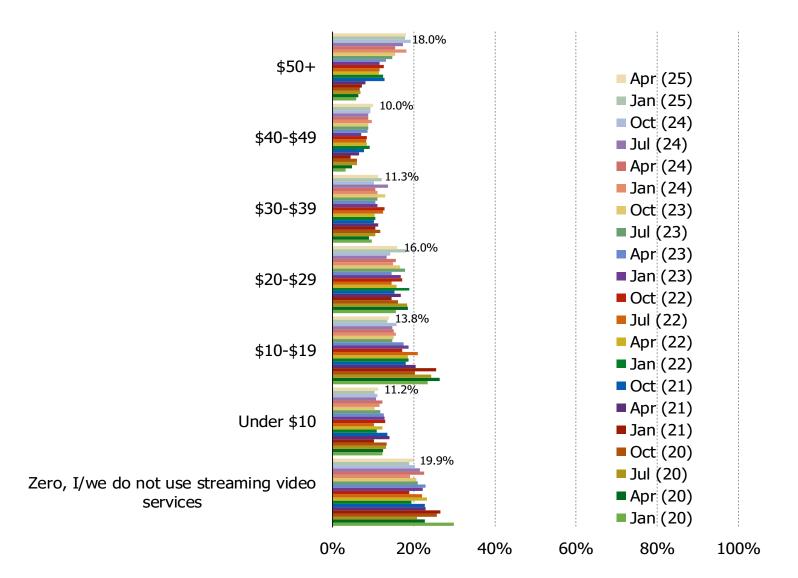
Posed to respondents who currently pay for cable or satellite tv.



SPEND ON STREAMING CONTENT

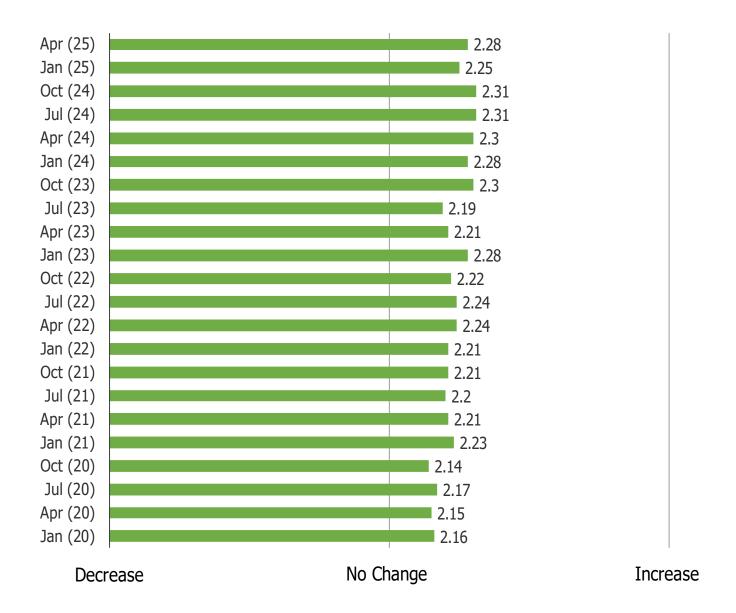
APPROXIMATELY HOW MUCH DO YOU SPEND ON STREAMING VIDEO SERVICES PER MONTH?

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?

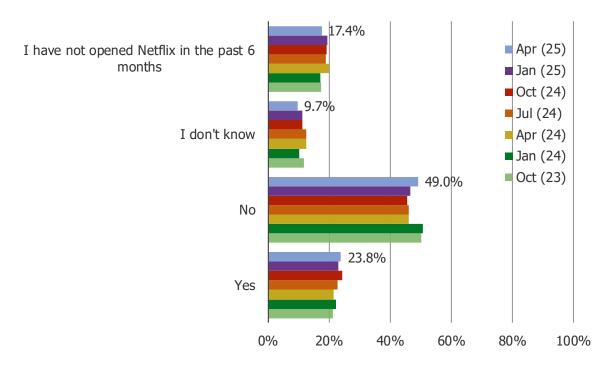
Posed to respondents who currently pay for cable or satellite tv.



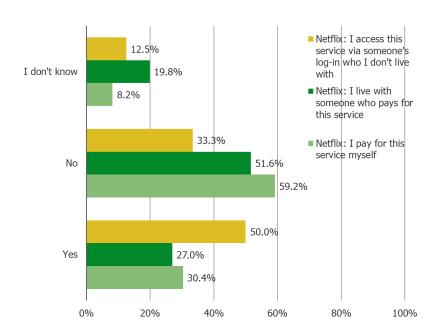
RE-AUTHENTICATING NETFLIX

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...

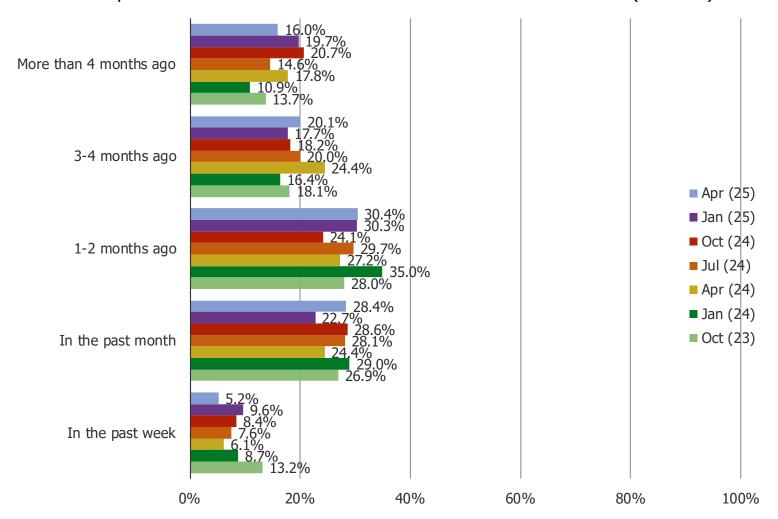


Posed to respondents who watch Netflix, cross-tabbed by how they access Netflix...



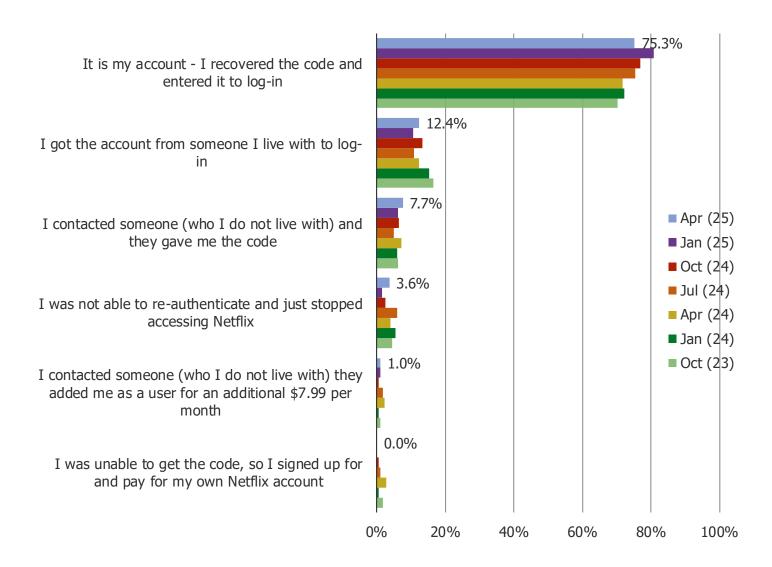
WHEN WERE YOU MOST RECENTLY FORCED TO RE-AUTHENTICATE TO GET INTO NETFLIX?

Posed to respondents who were asked to re-authenticate to access Netflix (N = 194).



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 = 194).



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CABLE TV PERSONALITIES AND LIVE SPORTS/EVENTS

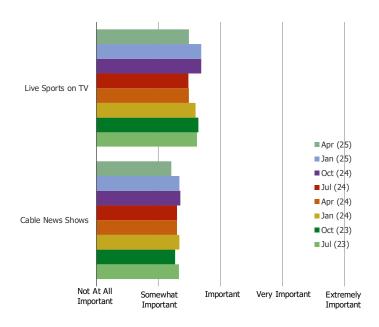
OF ALL THE THINGS YOU WATCH ON CABLE TV, WHICH IS MOST IMPORTANT TO YOU?

Posed to all respondents who watch cable TV at home.

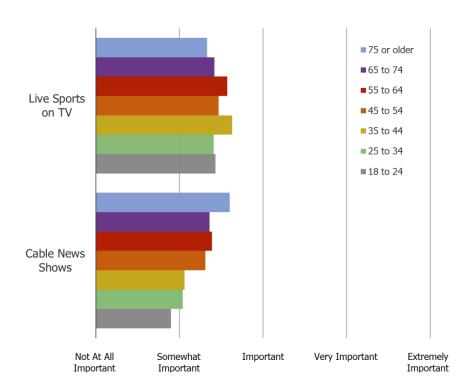


HOW IMPORTANT ARE THE FOLLOWING TO YOU...

Posed to all respondents.



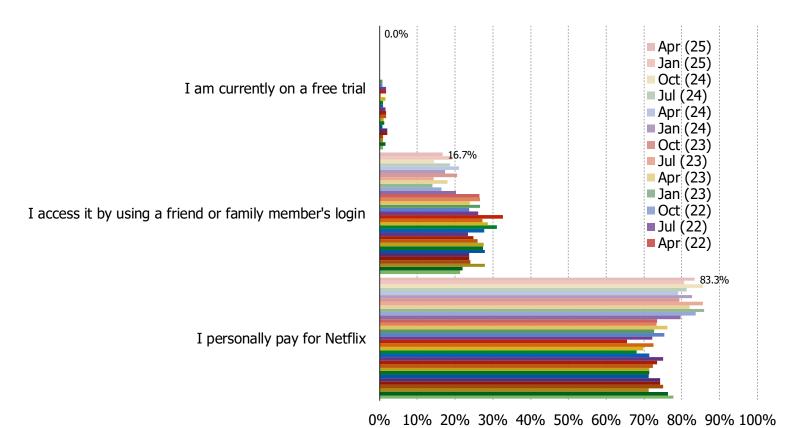
Cross-Tab (Weighted Averages)



NFLX ACCOUNT SHARING

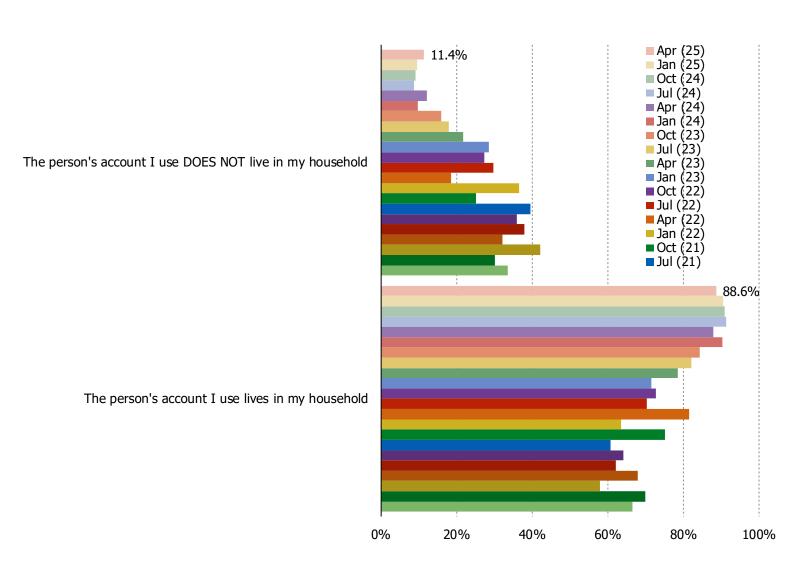
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

Posed to Netflix subscribers.



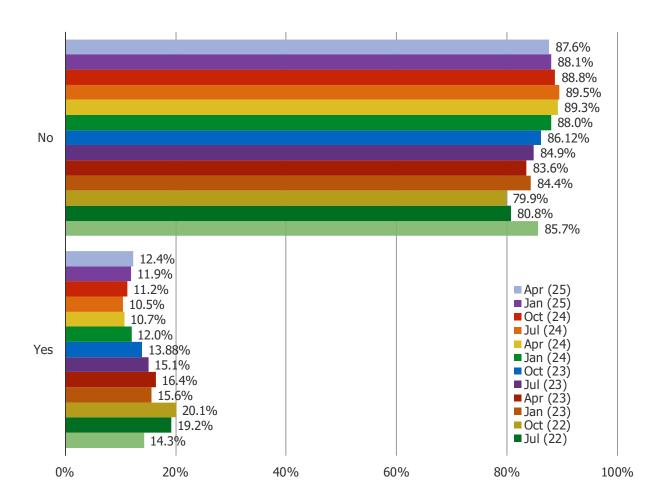
DO YOU SHARE A PASSWORD WITH SOMEONE WHO LIVES IN YOUR HOUSEHOLD, OR SOMEONE WHO DOES NOT LIVE IN YOUR HOUSEHOLD?

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



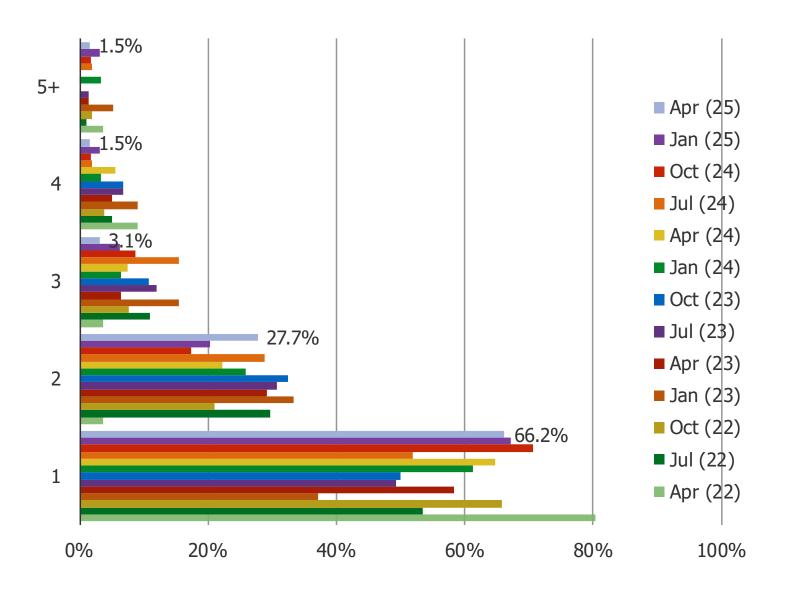
DO YOU LET ANYONE LIVING OUTSIDE OF YOUR HOUSEHOLD USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix or lives with someone who pays for Netflix (N=518).



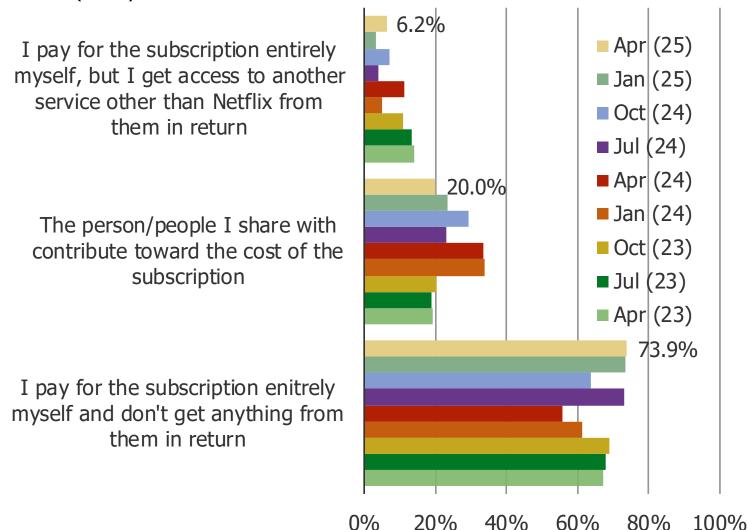
HOW MANY PEOPLE WHO LIVE OUTSIDE OF YOUR HOUSEHOLD DO YOU LET USE YOUR NETFLIX ACCOUNT?

Posed to all respondents who pay for Netflix and let people outside of their house use their log-in (N = 65)



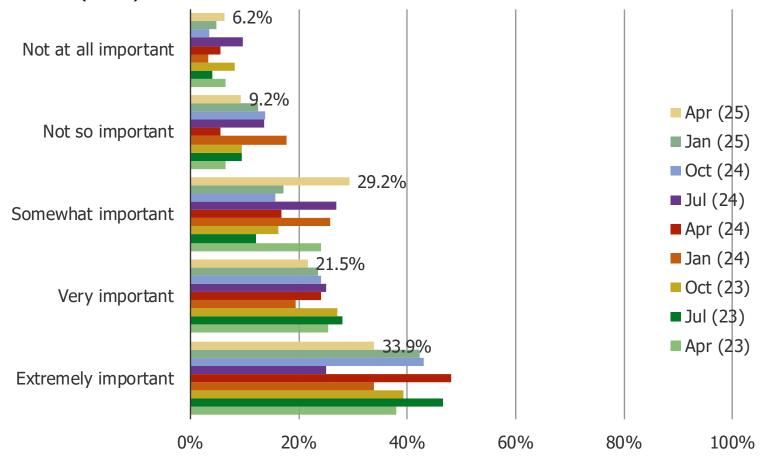
THINKING OF THE PERSON/PEOPLE YOU SHARE YOUR ACCOUNT WITH, WHO PAYS FOR THE SUBSCRIPTION?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=65)



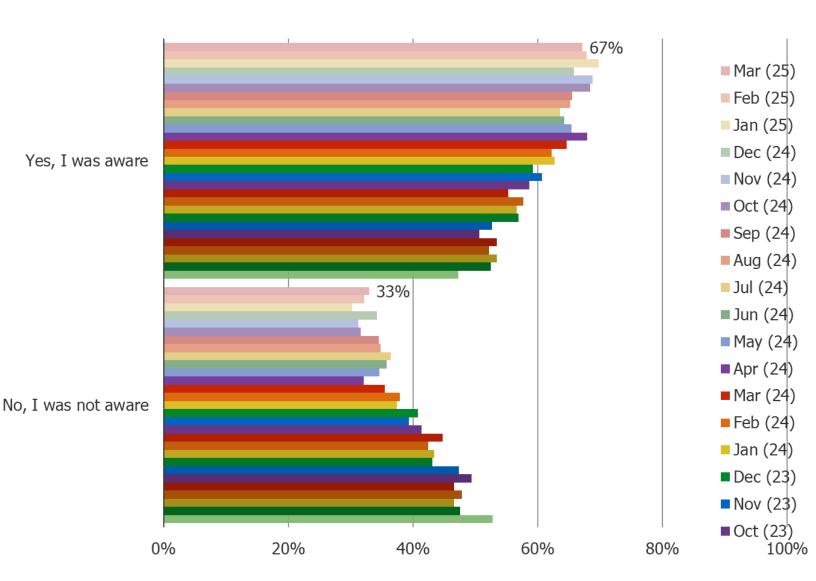
HOW IMPORTANT IS IT TO YOU TO BE ABLE TO SHARE YOUR NETFLIX ACCOUNT WITH PEOPLE WHO LIVE OUTSIDE OF YOUR HOME?

Posed to Netflix subscribers who allow anyone outside their household to use their Netflix account. (N=65)

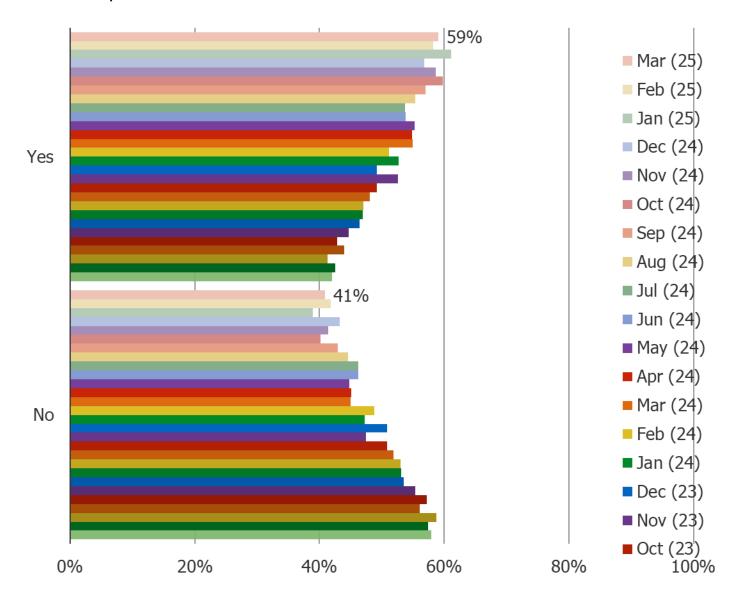


STANDARD WITH ADS

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

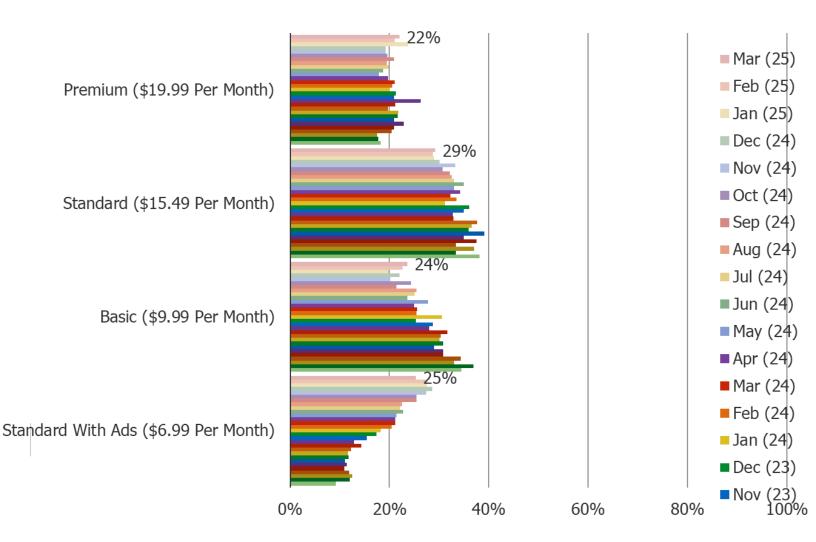


BEFORE TAKING THIS SURVEY, WERE YOU AWARE THAT DISNEY+ HAS AN AD-SUPPORTED TIER WITH COMMERCIALS?



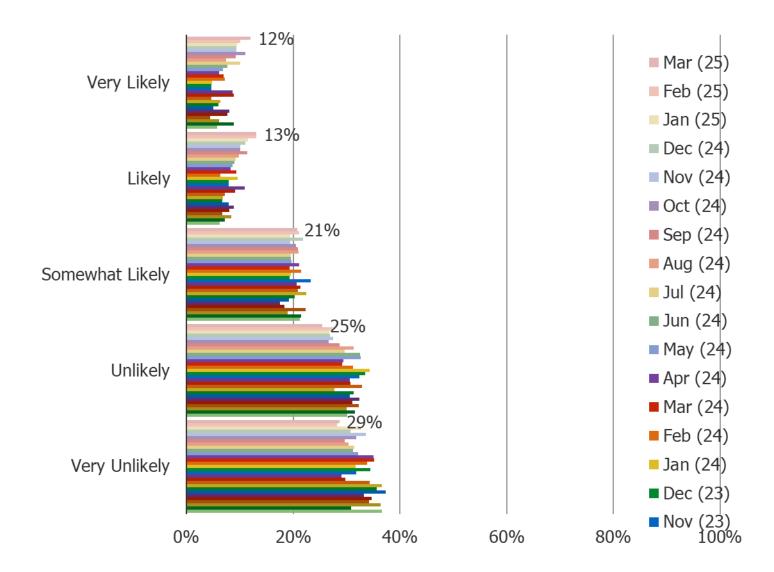
WHICH OF THE FOLLOWING MOST ACCURATELY DESCRIBES YOUR NETFLIX SUBSCRIPTION?

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?

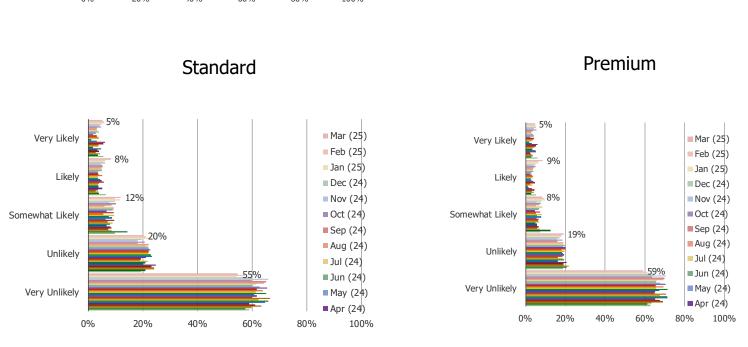
Posed to all respondents who are Netflix subscribers but are not on the ad supported plan.



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

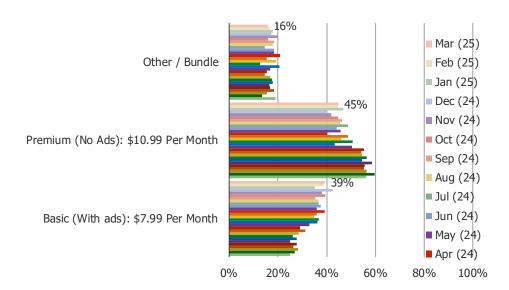
Posed to all respondents who are not currently Netflix subscribers.

Basic Standard with Ads Mar (25) Very Likely ■ Mar (25) Very Likely Feb (25) Feb (25) Jan (25) Jan (25) ■ Dec (24) Likely ■ Dec (24) I ikely ■ Nov (24) Nov (24) Oct (24) Oct (24) Somewhat Likely Somewhat Likely ■ Sep (24) ■ Sep (24) ■ Aug (24) ■ Aug (24) Jul (24) Jul (24) Unlikely Unlikely ■ Jun (24) ■ Jun (24) ■ May (24) ■ May (24) Very Unlikely ■ Apr (24) ■ Apr (24) Very Unlikely ■ Mar (24) ■ Mar (24) ■ Feb (24) 20% 40% 60% 100% 0% 20% 60% 100%



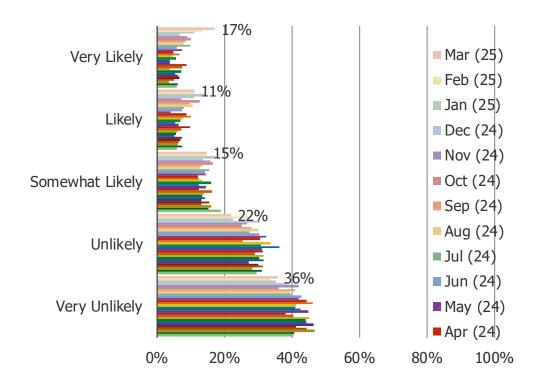
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR DISNEY+ SUBSCRIPTION?

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?

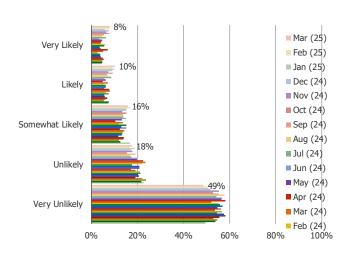
Posed to all respondents who are Disney+ subscribers but are not on the ad supported plan currently.



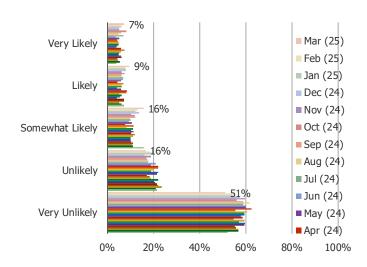
HOW LIKELY ARE YOU TO SIGN UP FOR THE FOLLOWING DISNEY+ PLANS IN THE NEXT MONTH?

Posed to respondents who are not currently Disney+ subscribers.

Basic (With ads): \$7.99 Per Month

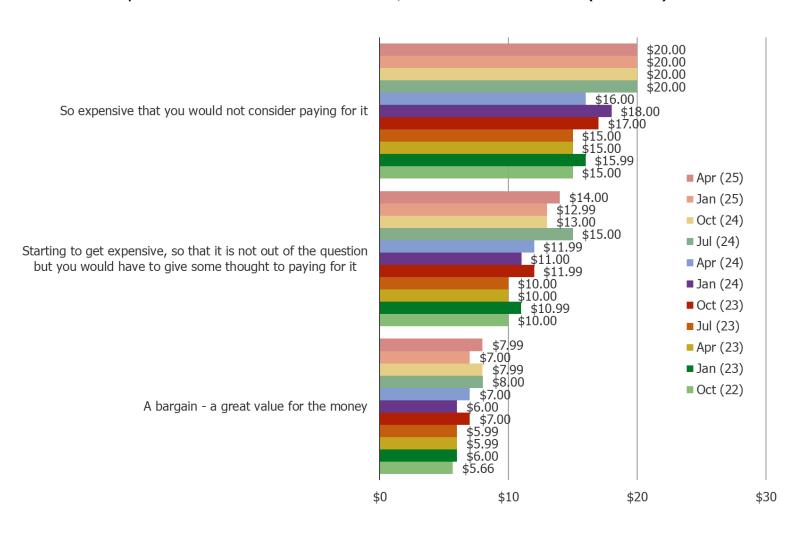


Premium (No Ads): \$10.99 Per Month



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

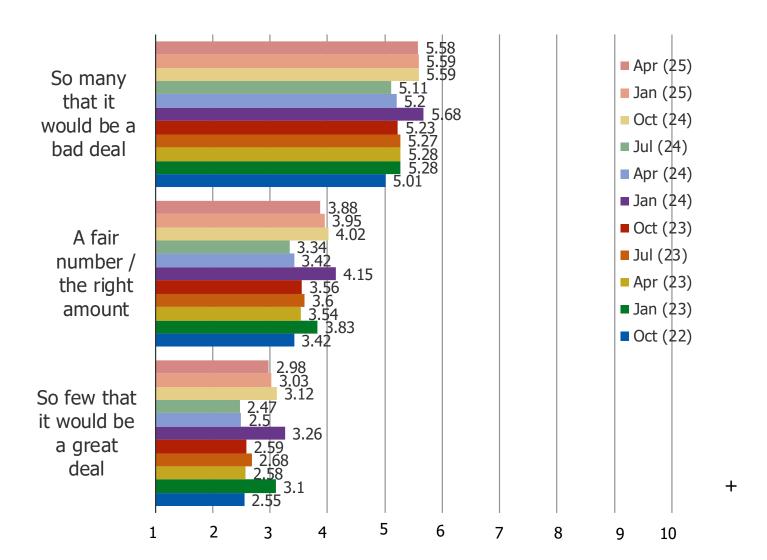
Posed to respondents who watch movies and/or TV shows at home (N = 813)



*Median

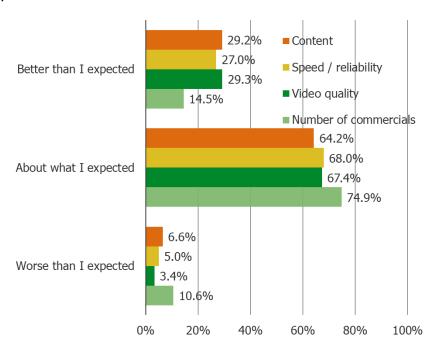
THINKING ABOUT NETFLIX'S AD-SUPPORTED TIER, HOW MANY COMMERCIALS PER HOUR WOULD YOU CONSIDER TO BE...

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 1288

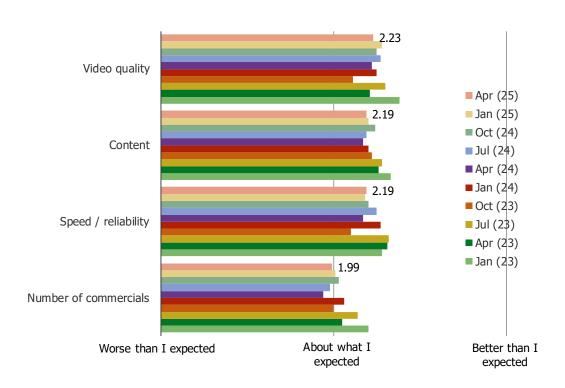


HOW DOES YOUR EXPERIENCE WITH THE STANDARDS WITH ADS PLAN COMPARE TO YOUR EXPECTATIONS WHEN IT COMES TO THE FOLLOWING?

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 1250

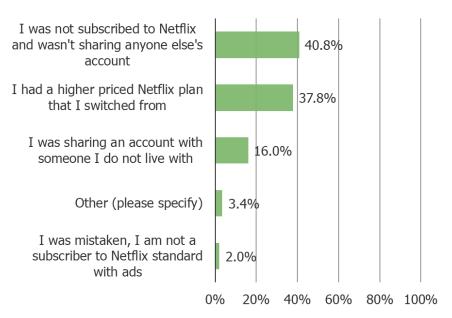


Weighted Average, vs. Historical Readings

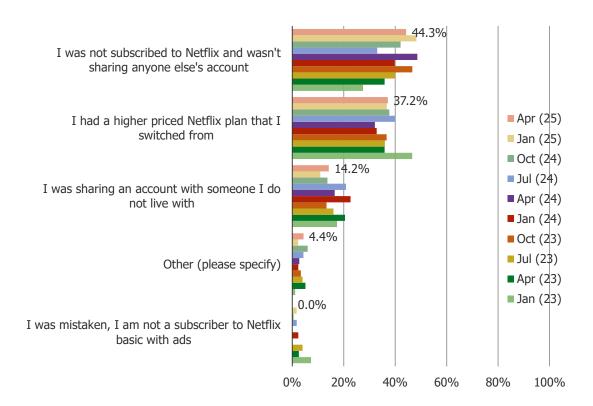


BEFORE YOU SIGNED UP FOR NETFLIX STANDARD WITH ADS, WHICH OF THE FOLLOWING BEST DESCRIBES YOU?

Posed to respondents who said they are on the Standard with Ads Plan (all waves since launch combined), N = 1250

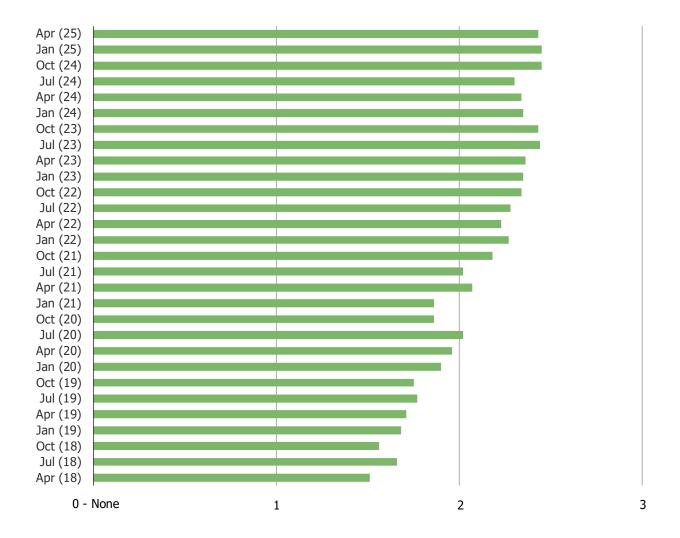


Historical Readings, Wave by Wave...

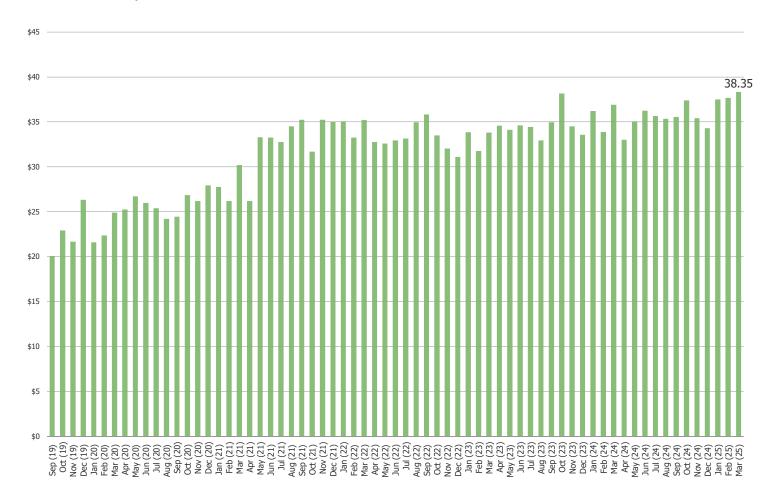


STREAMING SECTOR DYNAMICS

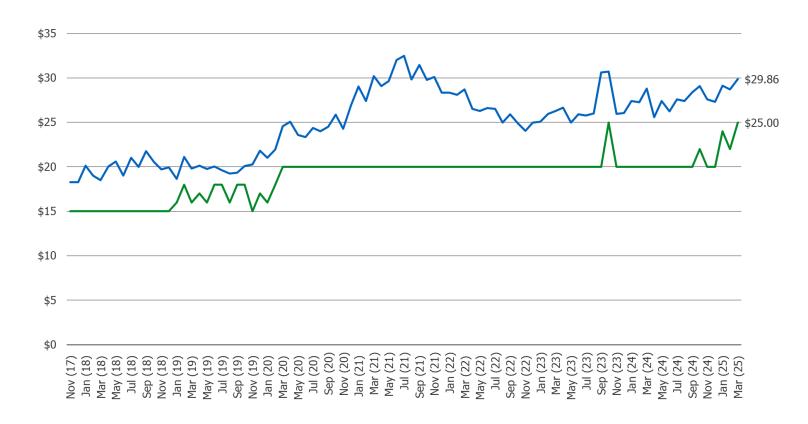
HOW MANY STREAMING VIDEO SERVICES DO YOU THINK IS THE RIGHT NUMBER TO BE PAYING FOR AT THE SAME TIME?



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

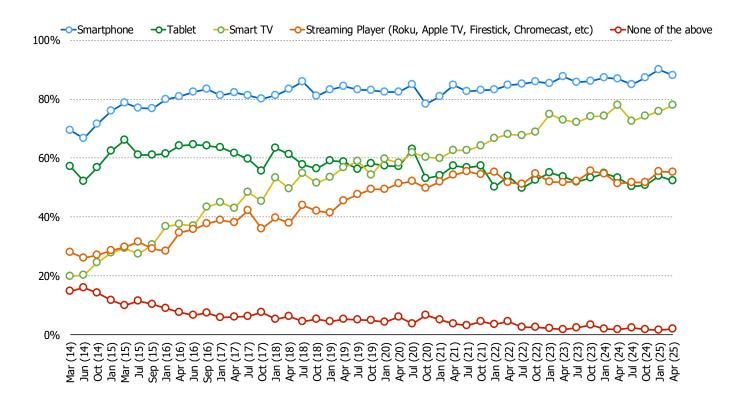


AT WHAT MONTHLY PRICE POINT WOULD YOU DECIDE TO CANCEL YOUR NETFLIX SUBSCRIPTION? (IE, IF NETFLIX CONTINUES TO RAISE PRICES, WHAT PRICE POINT PER MONTH WOULD TRIGGER YOUR CANCELLATION OF NETFLIX)?



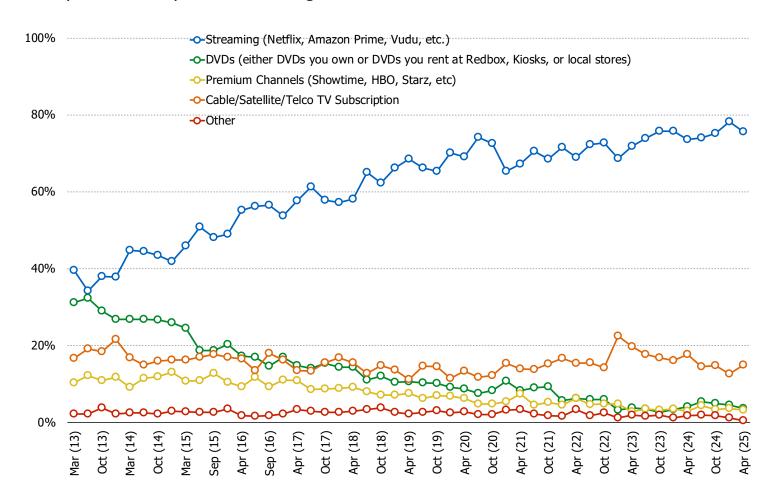
INTERNET CONNECTED DEVICES OWNED BY RESPONDENTS

This question was posed to the target audience.



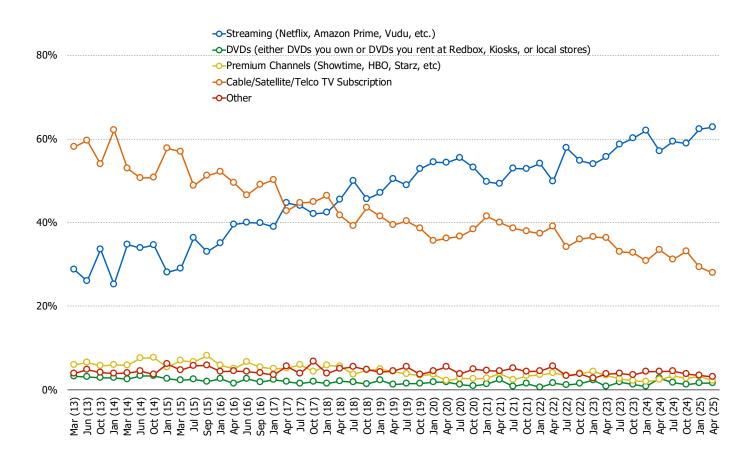
PREFERRED METHOD FOR WATCHING MOVIES

This question was posed to the target audience.



PREFERRED METHOD FOR WATCHING TELEVISION SHOWS

This question was posed to the target audience.



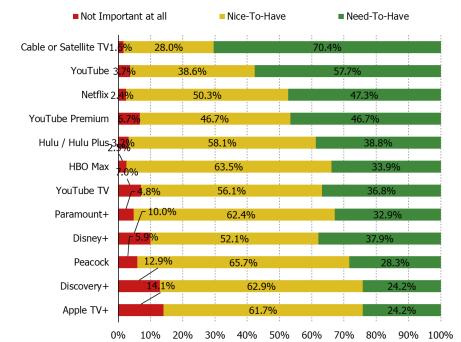
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MARKET	

STREAMING PLATFORMS – COMPETITIVE DYNAMICS

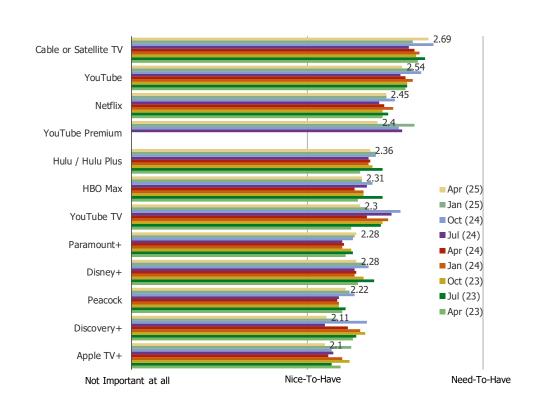
DO YOU CONSIDER THE FOLLOWING TO BE...

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



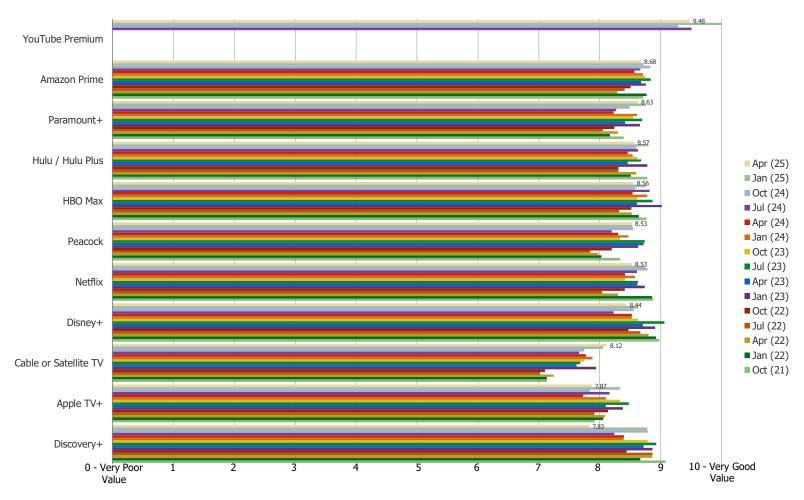
	N=
Apple TV+	128
Discovery+	62
Peacock	286
Disney+	311
Paramount+	295
YouTube TV	114
HBO Max	277
Hulu / Hulu Plus	379
YouTube Premium	60
Netflix	541
YouTube	350
Cable or Satellite TV	250





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

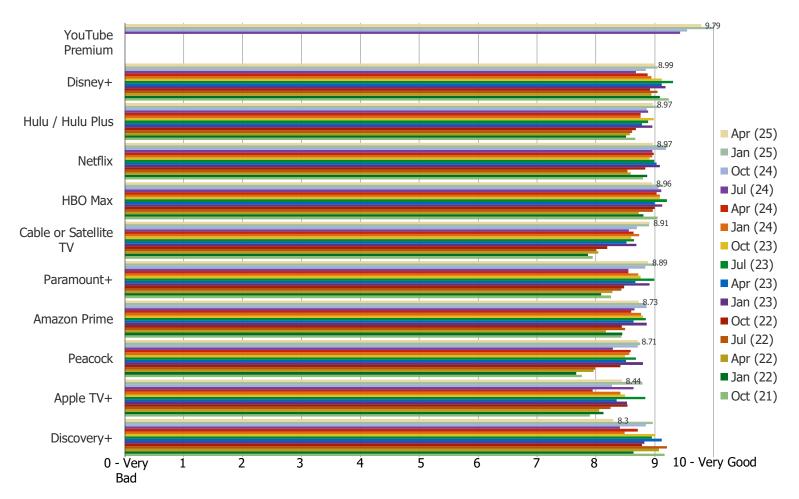
Posed to respondents who use each of the following at home and either pay for it themselves or access the platform via the account of someone they live with.



	N=
Discovery+	53
YouTube Premium	58
Apple TV+	113
HBO Max	240
Cable or Satellite TV	242
Peacock	258
Paramount+	275
Disney+	281
Hulu / Hulu Plus	349
Amazon Prime	466
Netflix	518

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.

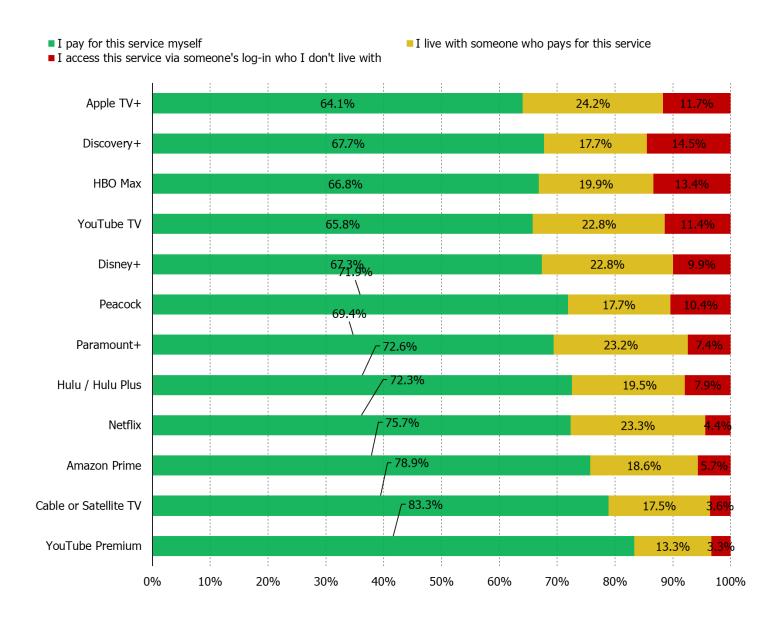


	N=
Discovery+	53
YouTube Premium	58
Apple TV+	113
HBO Max	240
Cable or Satellite TV	242
Peacock	258
Paramount+	275
Disney+	281
Hulu / Hulu Plus	349
Amazon Prime	466
Netflix	518

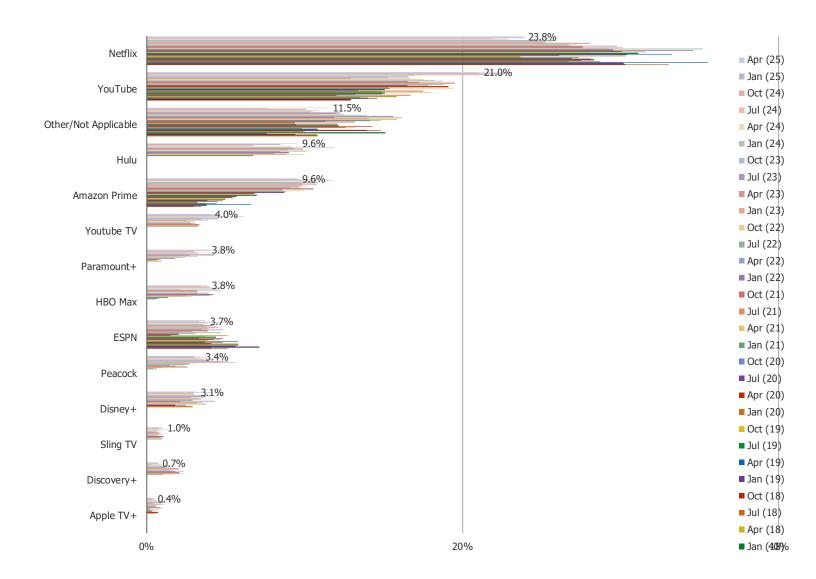
WHICH OF THE FOLLOWING BEST DESCRIBES YOUR USAGE OF THE FOLLOWING:

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.

APRIL 2025

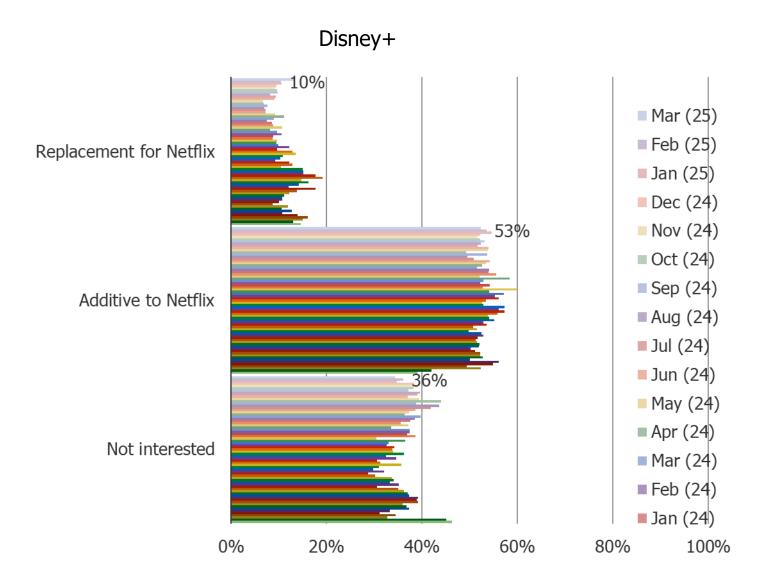


OUT OF THE FOLLOWING NETWORKS/SERVICES, WHICH DO YOU WATCH MOST OFTEN?



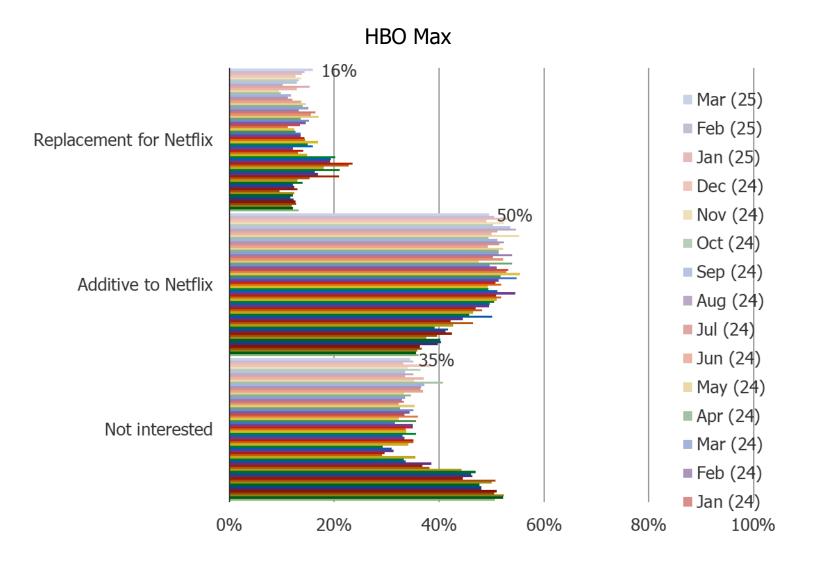
WOULD YOU VIEW THE FOLLOWING TO BE ADDITIVE OR A REPLACEMENT OF NETFLIX?

Posed to Netflix subscribers.



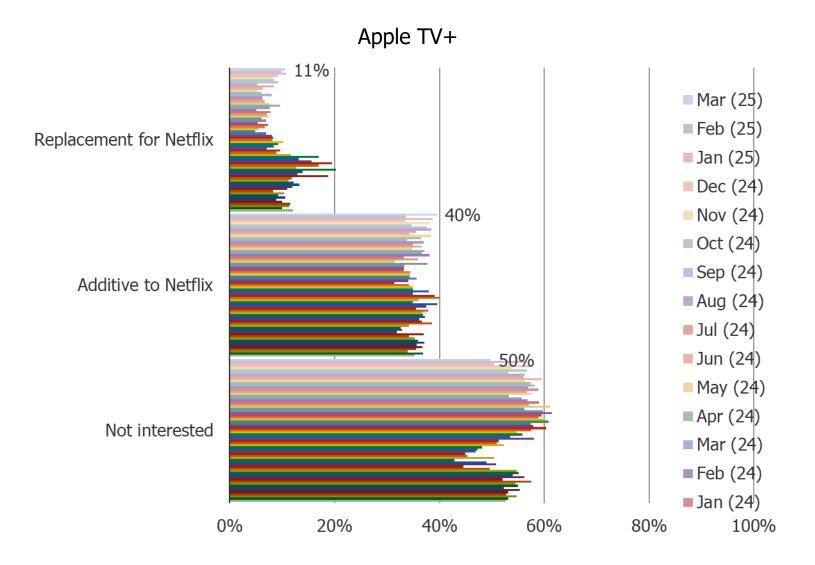
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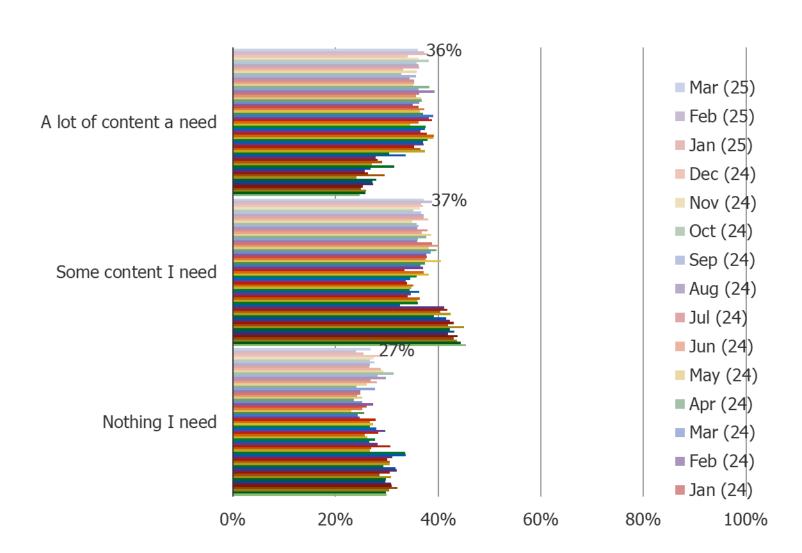
Posed to Netflix subscribers.



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

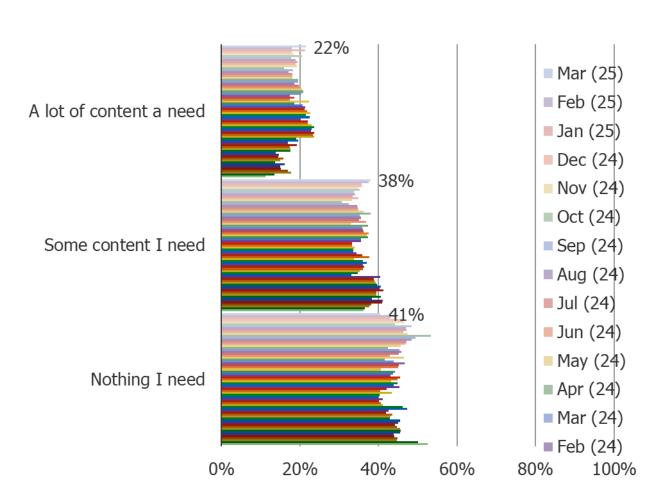
Posed to all respondents.

Netflix

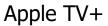


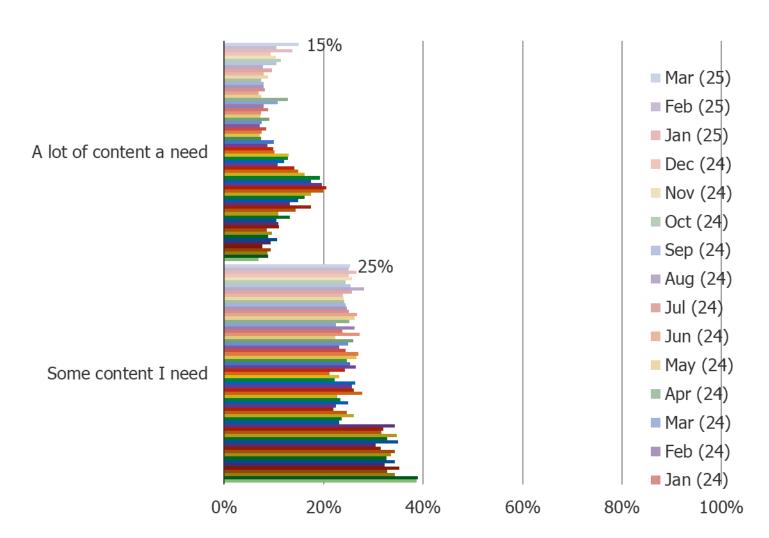
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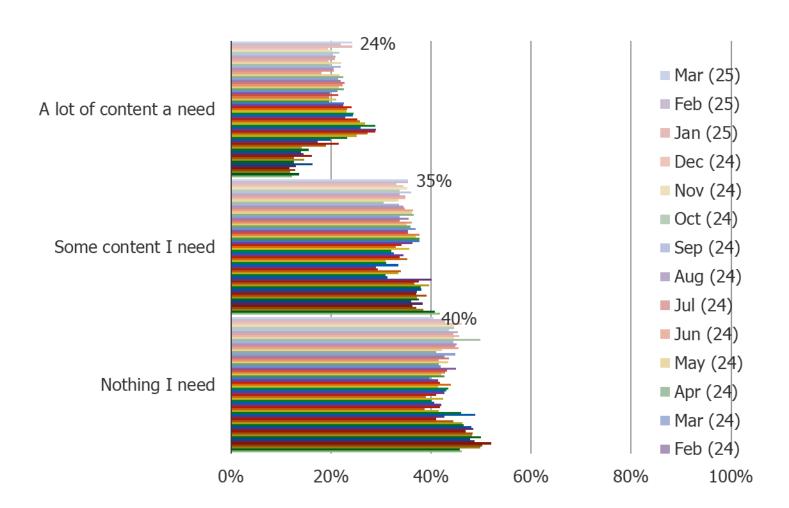




WHAT ARE YOUR EXPECTATIONS FOR THE CONTENT THAT WILL BE ON EACH OF THESE PLATFORMS GOING FORWARD?

Posed to all respondents.

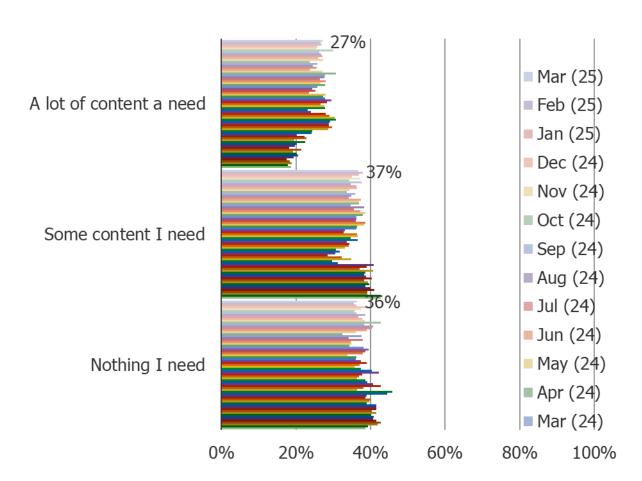
HBO Max



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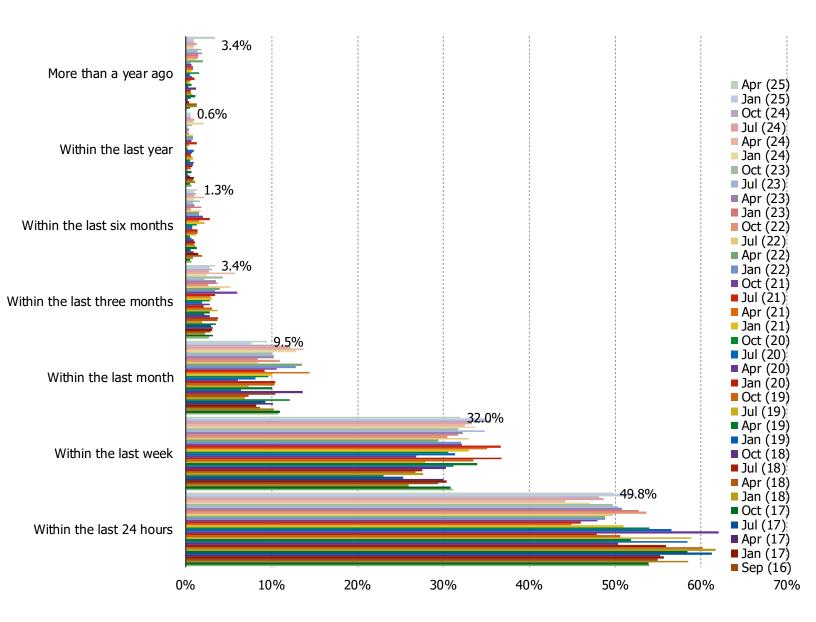
Posed to all respondents.

Hulu

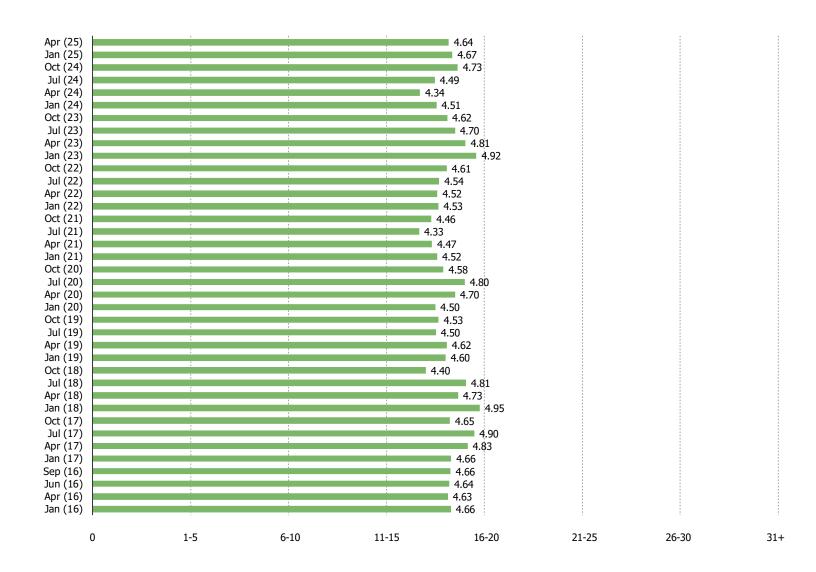


NETFLIX SUBSCRIBER ENGAGEMENT

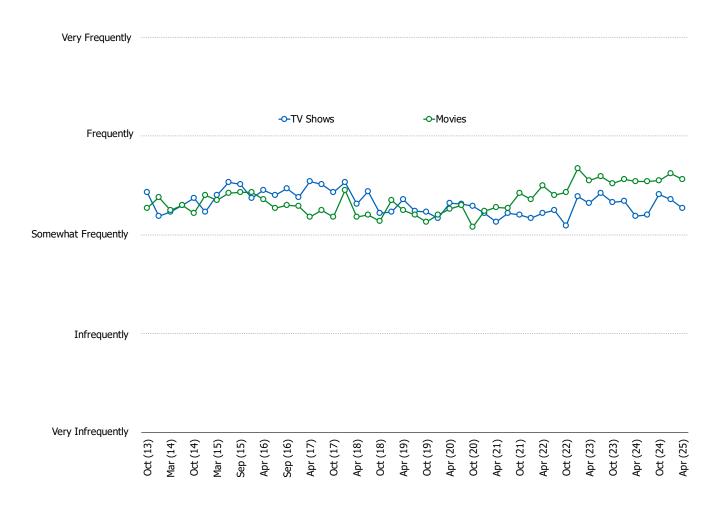
WHEN IS THE LAST TIME YOU WATCHED SOMETHING ON NETFLIX?



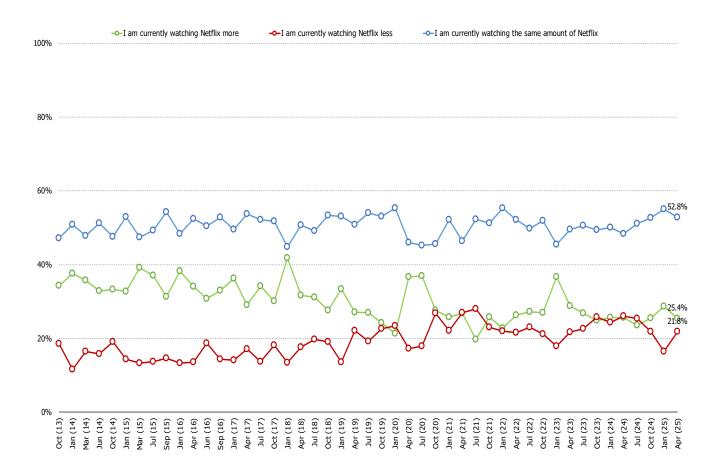
IN AN AVERAGE MONTH, HOW MANY HOURS OF NETFLIX DO YOU WATCH?



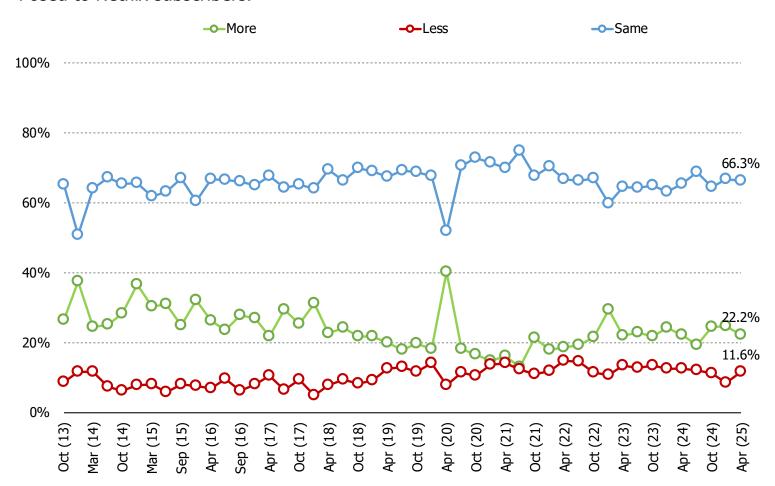
FREQUENCY OF WATCHING TV SHOWS AND MOVIES



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

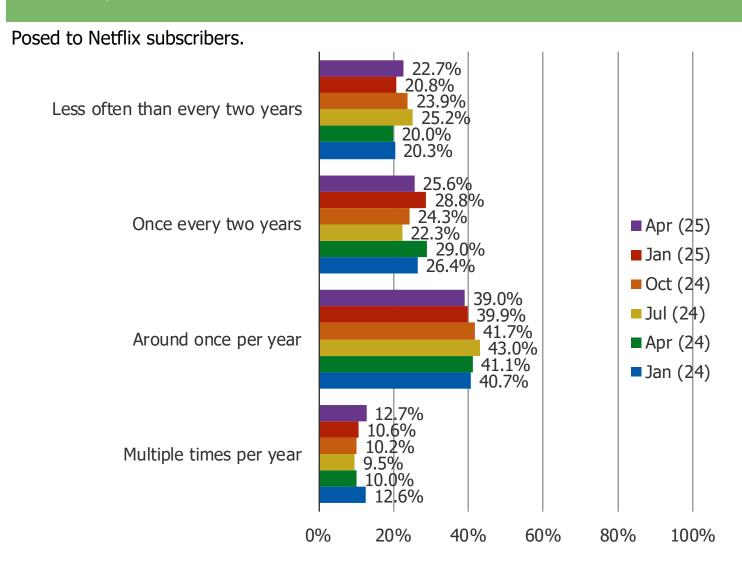


DO YOU EXPECT TO USE NETFLIX MORE OR LESS OVER THE NEXT FEW MONTHS?

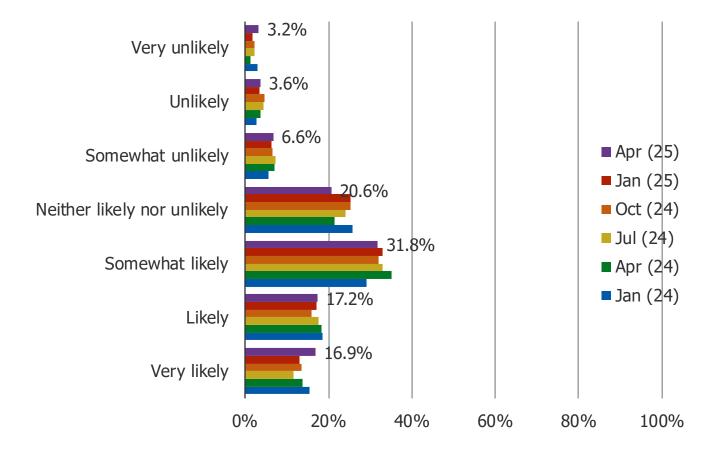


NETFLIX PRICING POWER

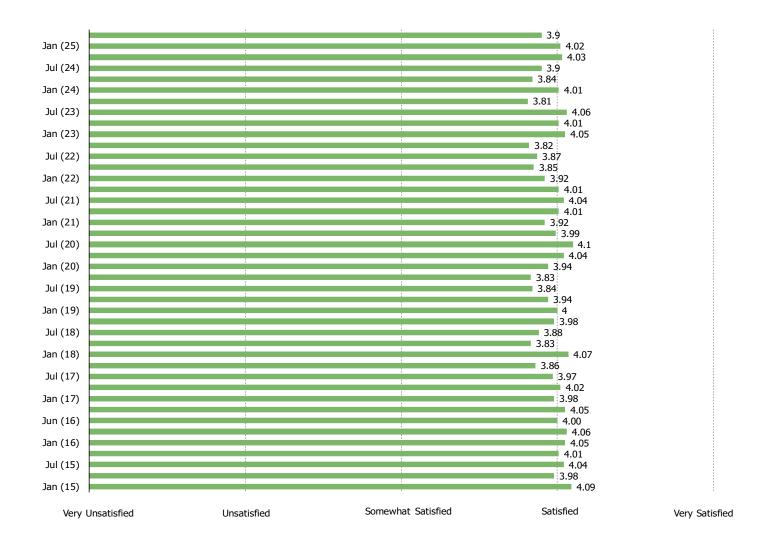
IN GENERAL, HOW OFTEN DO YOU EXPECT NETFLIX TO INCREASE THEIR PRICES?



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

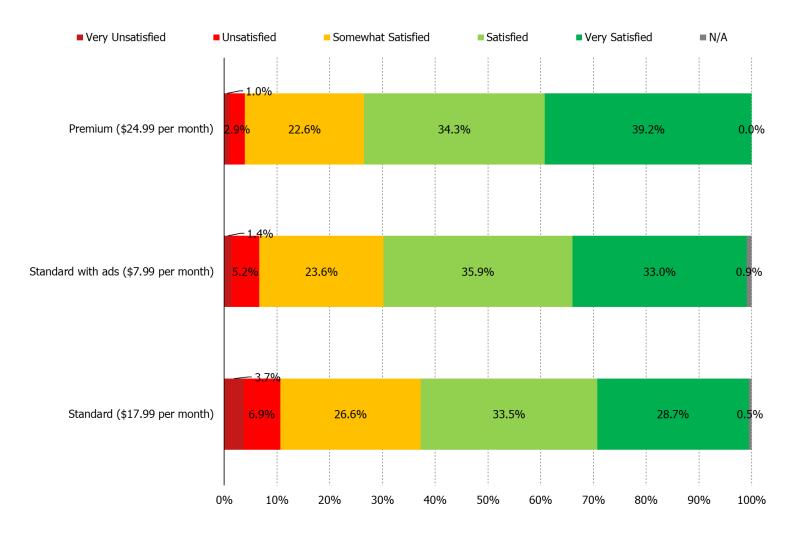


SATISFACTION WITH THE VALUE THEY RECEIVE FOR THE MONEY WITH NETFLIX



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

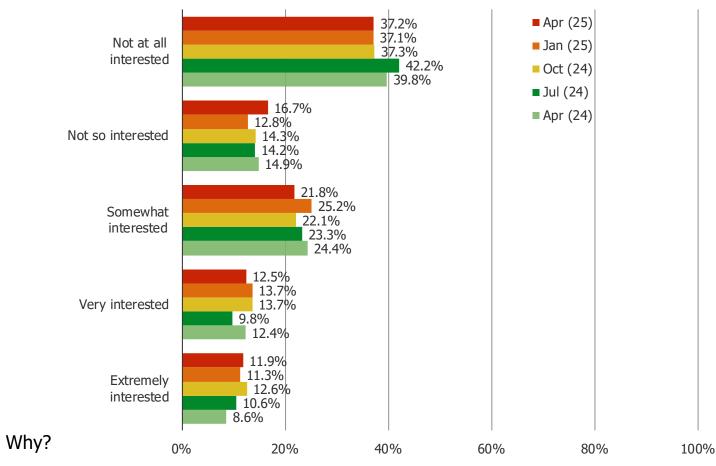
Posed to Netflix subscribers, cross-tabbed by plan...



NETFLIX CONTENT

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

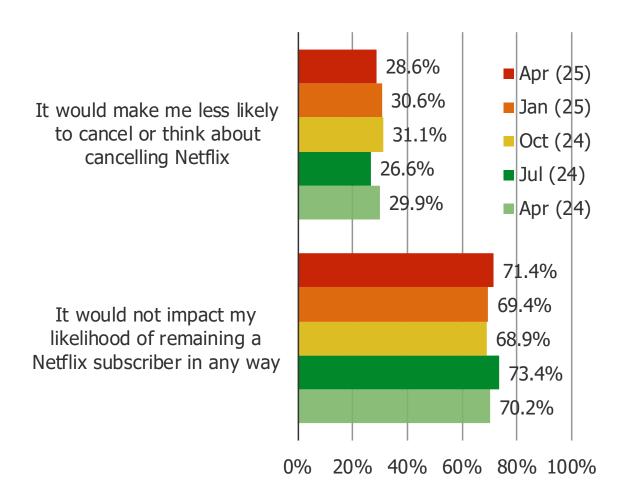
Posed to all respondents.





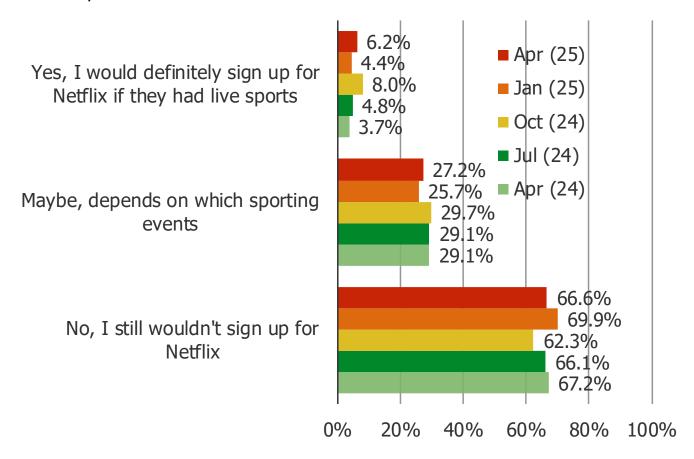
YOU MENTIONED YOU ARE A NETFLIX SUBSCRIBER. IF NETFLIX STARTED OFFERING MORE LIVE SPORTS EVENTS ON NETFLIX, WHICH BEST DESCRIBES YOU...

Posed to respondents who are Netflix subscribers.

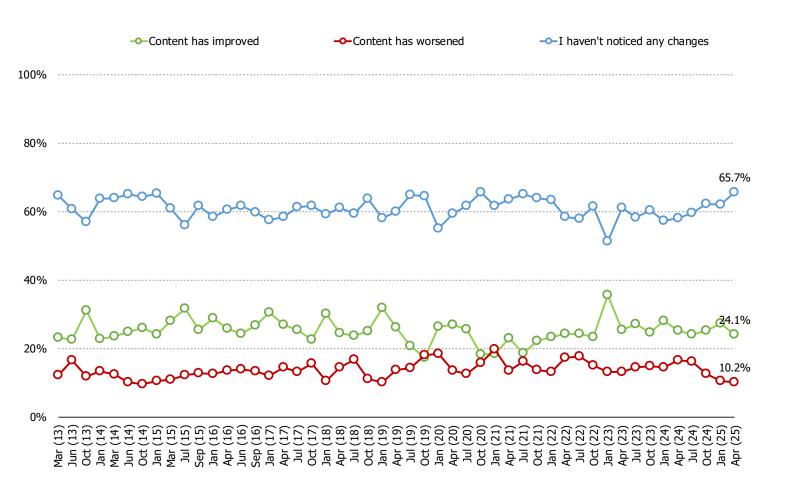


YOU MENTIONED THAT YOU ARE NOT A NETFLIX SUBSCRIBER. IF NETFLIX STARTED OFFERING MORE LIVE SPORTING EVENTS AS PART OF THEIR SUBSCRIPTION, WOULD THAT COMPEL YOU TO SIGN UP FOR NETFLIX?

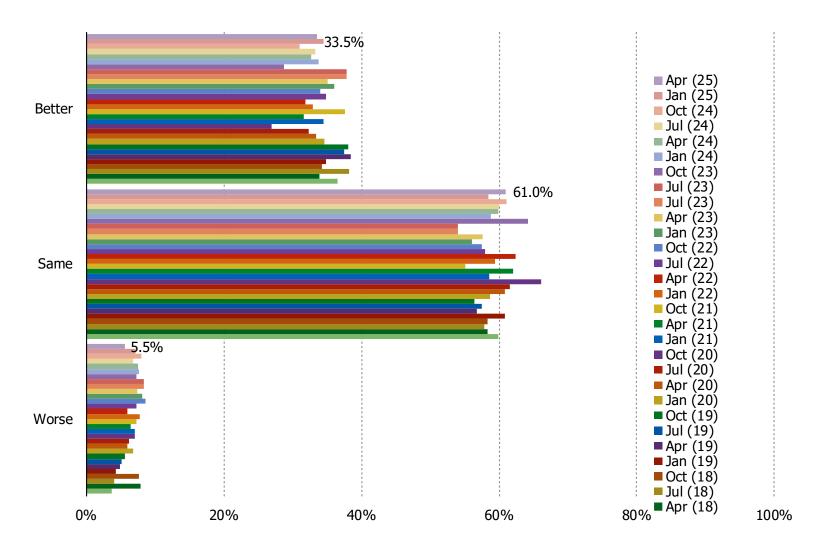
Posed to respondents who are NOT Netflix subscribers.



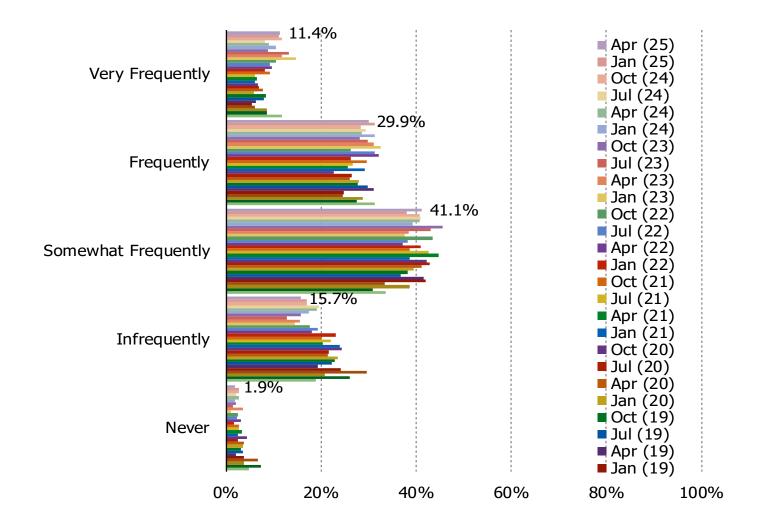
HAVE YOU NOTICED ANY CHANGES TO NETFLIX'S CONTENT OVER THE LAST SIX MONTHS?



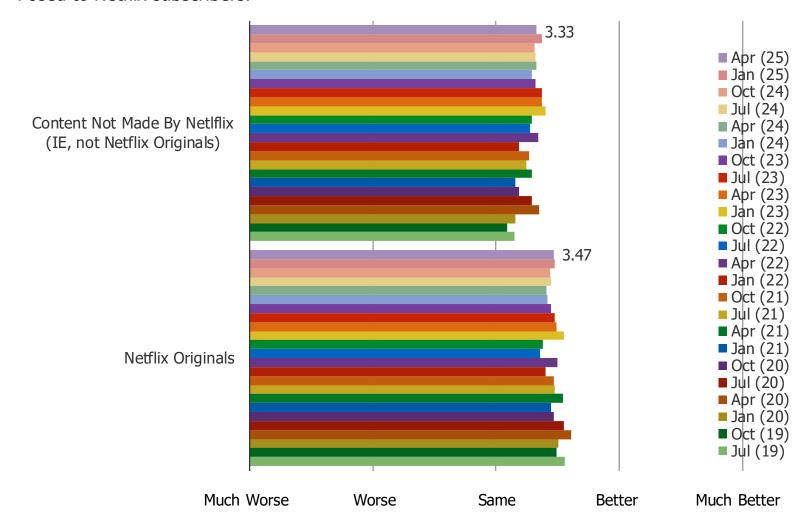
HOW DO YOU COMPARE NETFLIX ORIGINAL CONTENT SHOWS AGAINST SHOWS YOU VIEW ON OTHER NETWORKS OR SERVICES?



HOW OFTEN DO YOU WATCH NETFLIX ORIGINAL CONTENT SHOWS?



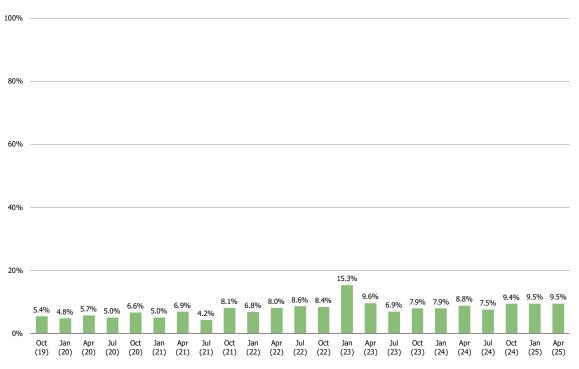
ONE YEAR FROM NOW, DO YOU EXPECT THE CONTENT AVAILABLE ON NETFLIX TO BE BETTER OR WORSE THAN IT IS TODAY?



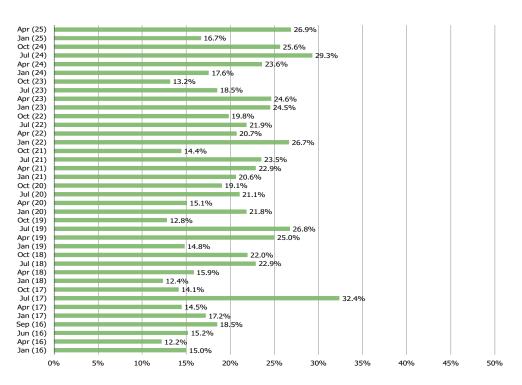
CYCLING IN AND OUT OF NETFLIX

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.



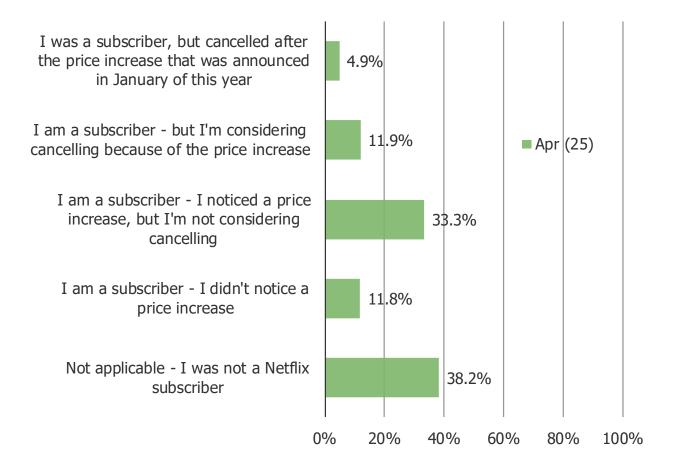
Posed to respondents who are not current Netflix subscribers but have been in the past.



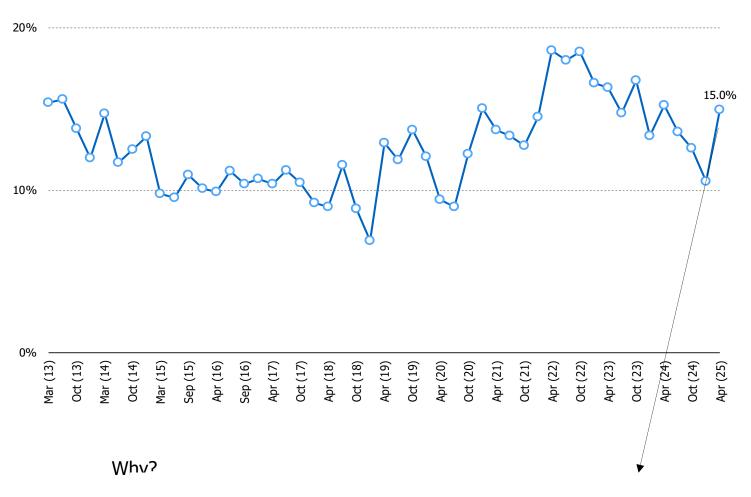
NFLX CHURN

IN JANUARY OF 2025, NETFLIX IMPLEMENTED THE FOLLOWING PRICE INCREASES: STANDARD PLAN WITH ADS: INCREASED FROM \$6.99 TO \$7.99 PER MONTH. STANDARD PLAN (AD-FREE): INCREASED FROM \$15.49 TO \$17.99 PER MONTH. PREMIUM PLAN: INCREASED FROM \$22.99 TO \$24.99 PER MONTH. WHICH OF THE FOLLOWING BEST DESCRIBES YOUR RESPONSE?

Posed to all respondents.

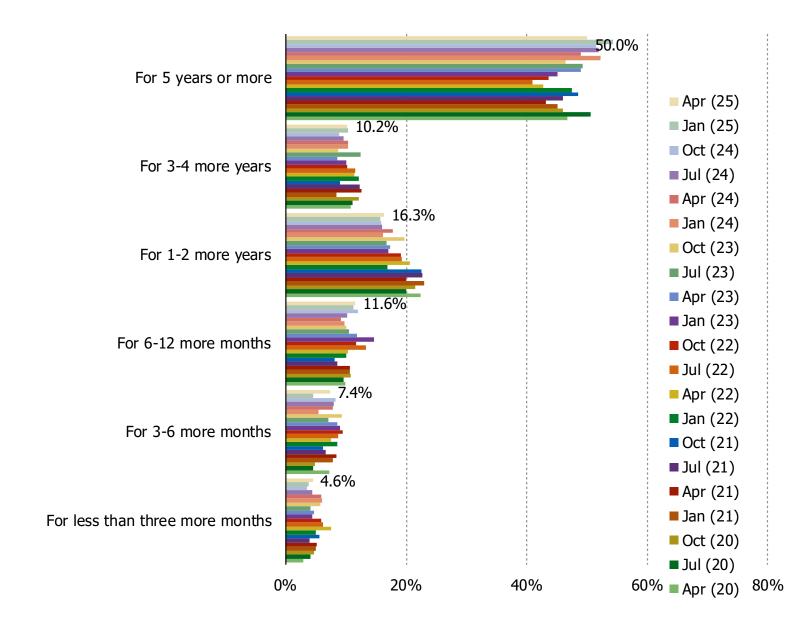


ARE YOU CONSIDERING CANCELLING YOUR NETFLIX SUBSCRIPTION?





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



FORMER NETFLIX SUBSCRIBERS - WHY DID YOU CANCEL?

Posed to former Netflix subscribers.

