



**Audience:** 1,000+ Consumers In India

Note: Audience skews more urban/toward those connected to the internet.

**KEY TAKEAWAYS:**

**STREAMING VIDEO IS THE  
TOP METHOD THAT  
RESPONDENTS USE FOR  
WATCHING BOTH TV  
SHOWS AND MOVIES.**

**SENTIMENT TOWARD  
FINANCES AND  
DISCRETIONARY SPENDING  
ABILITY IS GENERALLY  
STRONG.**

**NETFLIX DOMINATES  
UNAIDED AWARENESS FOR  
STREAMING VIDEO, RANKS  
SECOND BEHIND HOTSTAR  
IN ACCOUNT HOLDERS IN  
OUR SURVEY.**

**NETFLIX SUBSCRIBERS IN  
INDIA ARE ENGAGED WITH  
THE SERVICE AND OFFER A  
STRONG DEGREE OF  
SATISFACTION.**

**THERE IS RELATIVELY  
STRONG INTEREST IN NFLX  
AMONG NON-SUBSCRIBERS.  
40% WOULD BE  
INTERESTED IN PAYING  
FOR IT (RS 268 ON**

**THE MOBILE ONLY PLAN AT  
RS199 APPEARS TO BE  
WELL-RECEIVED AMONG  
CONSUMERS. IT IS THE  
MOST POPULAR WOULD-BE  
CHOICE OF NON-SUBS.**

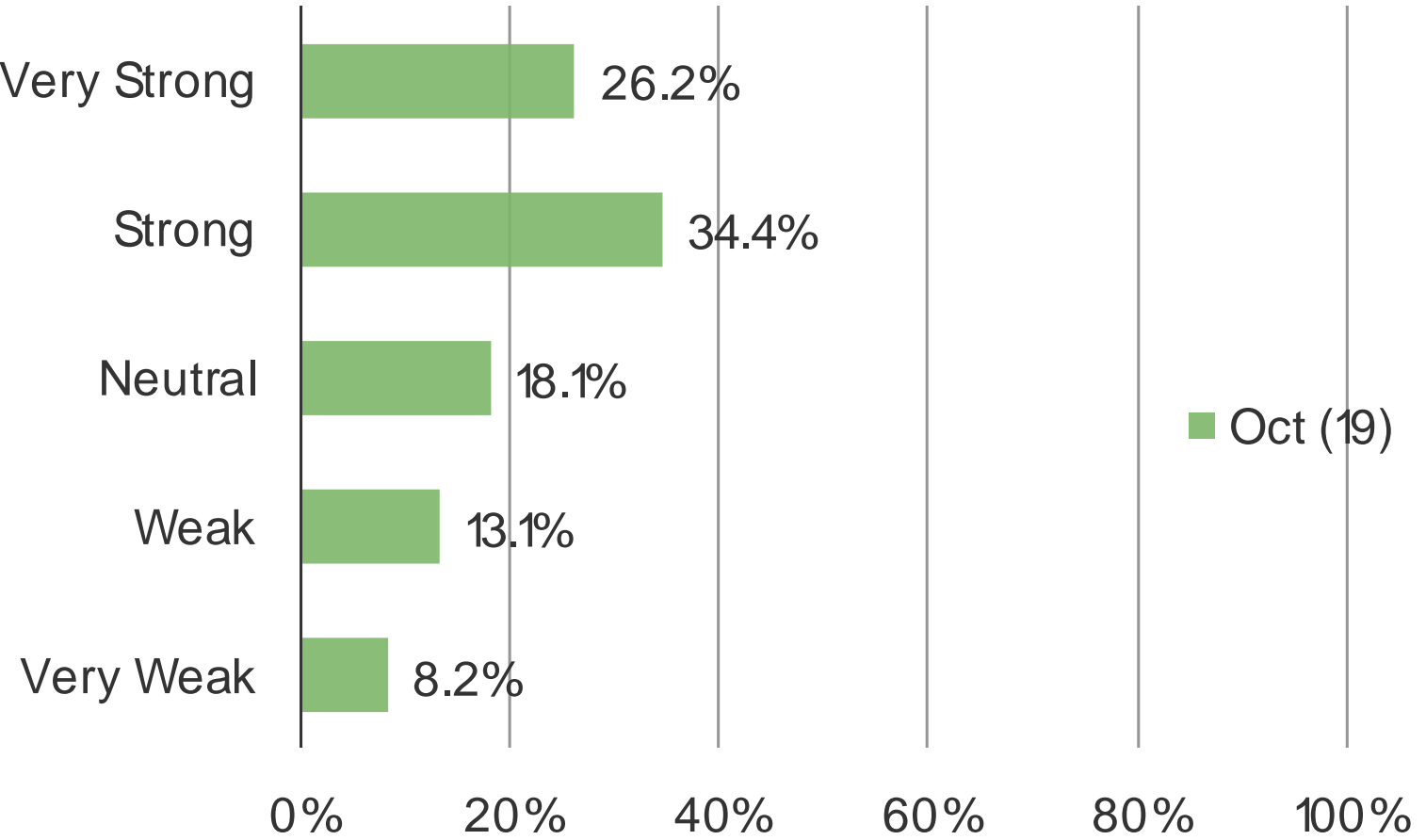
Netflix India

MACRO FACTORS

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OVERALL HOW CONFIDENT DO YOU FEEL IN THE ECONOMY?

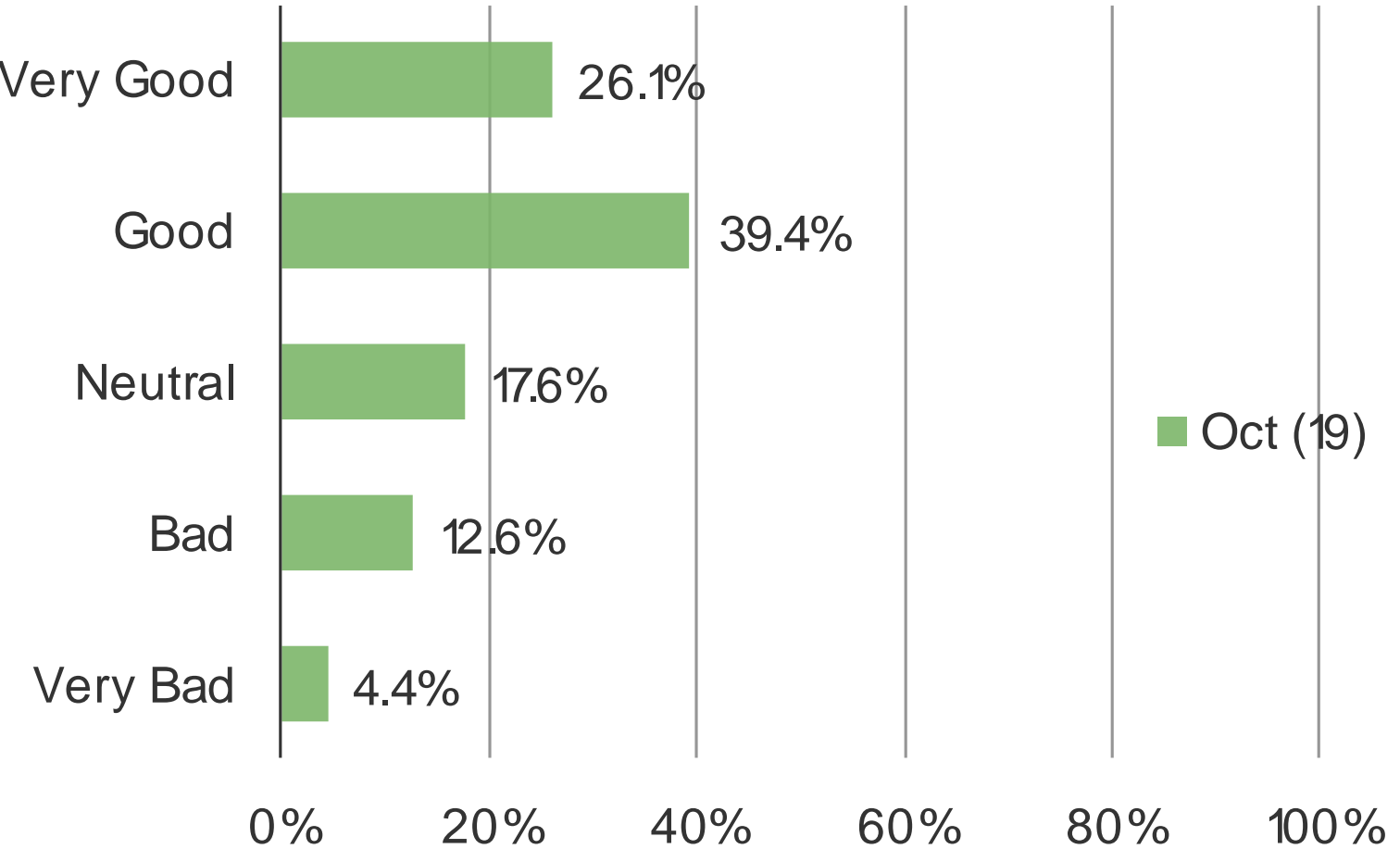
Posed to all respondents



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

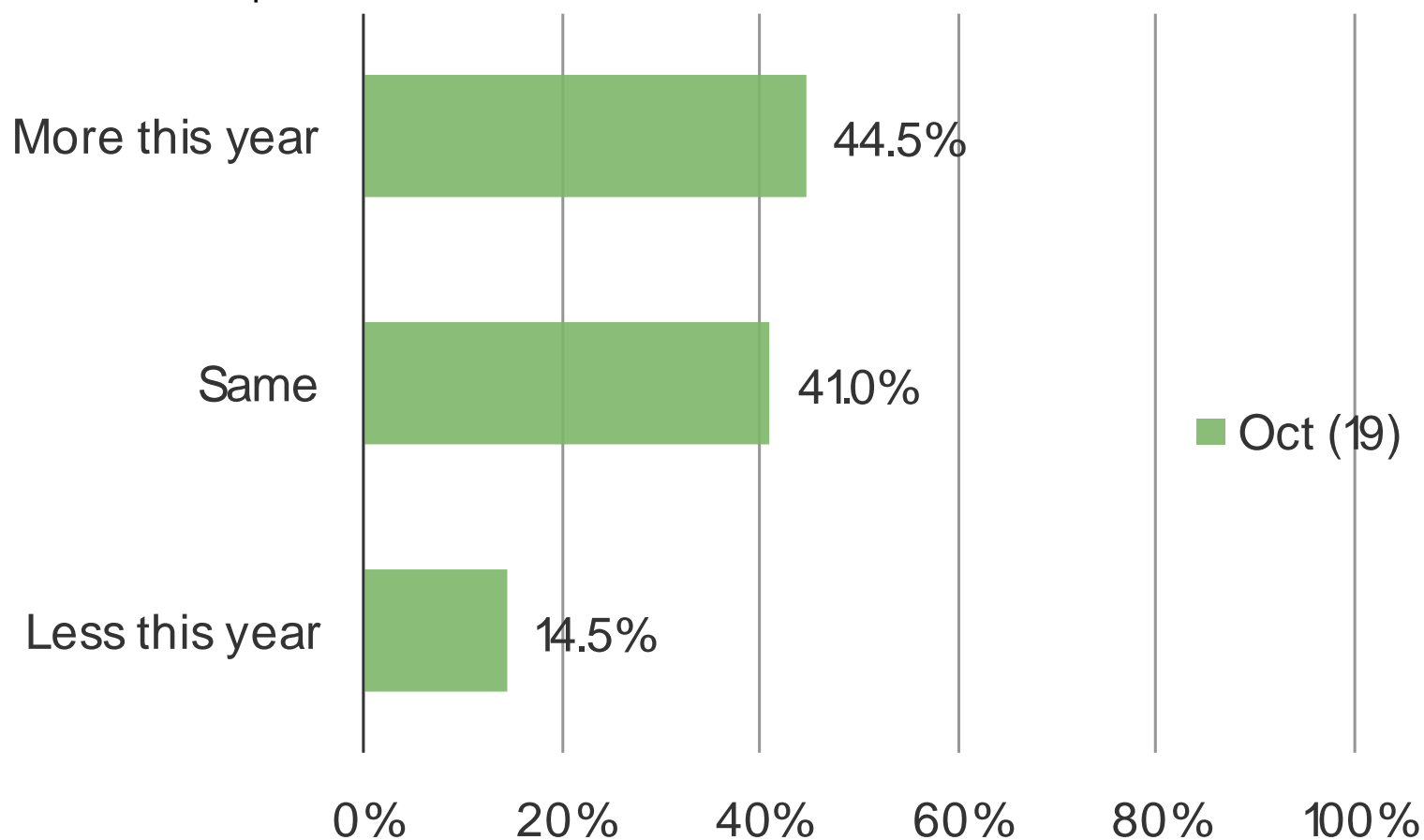
Posed to all respondents



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

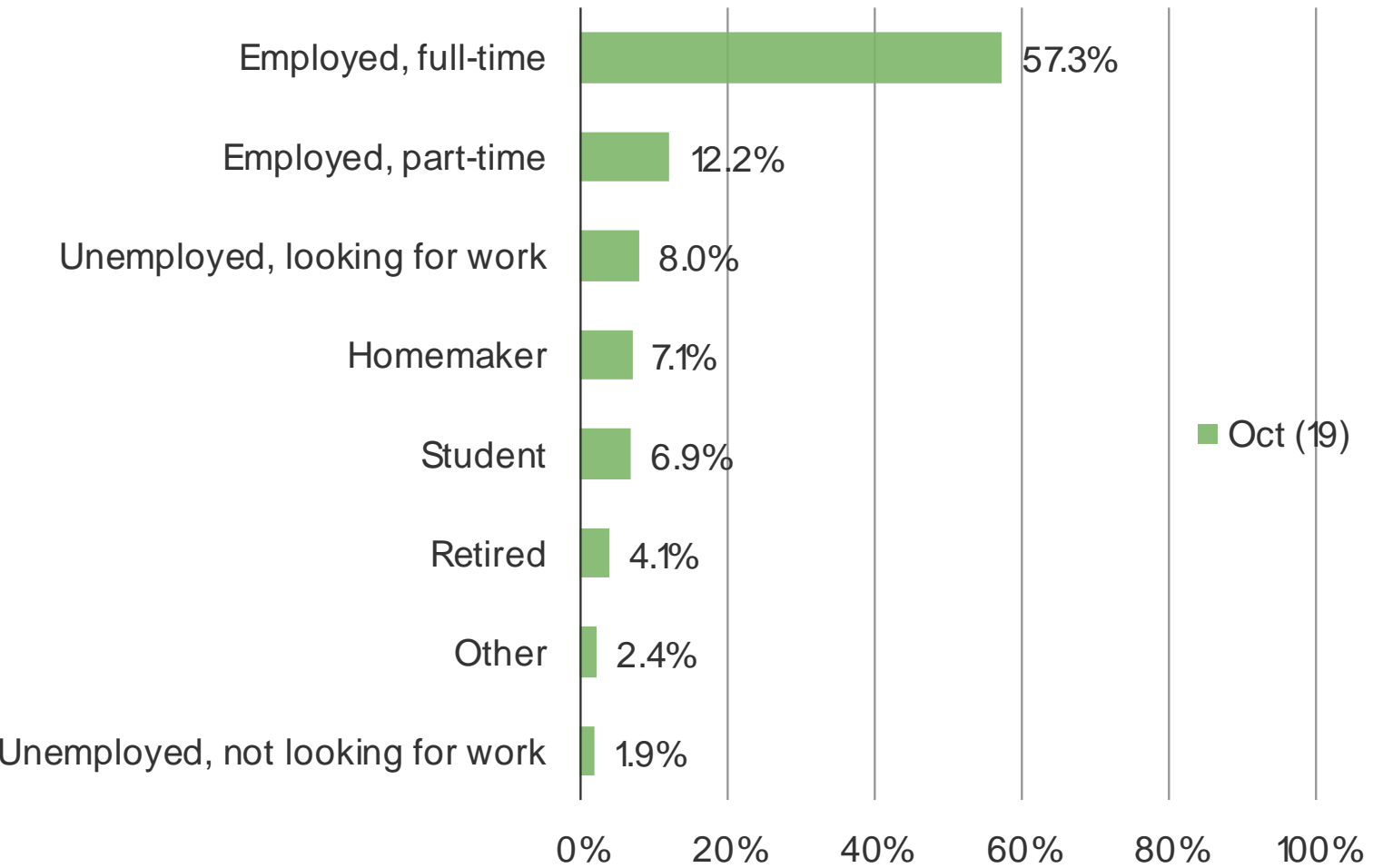
Posed to all respondents



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WHAT IS YOUR EMPLOYMENT STATUS?

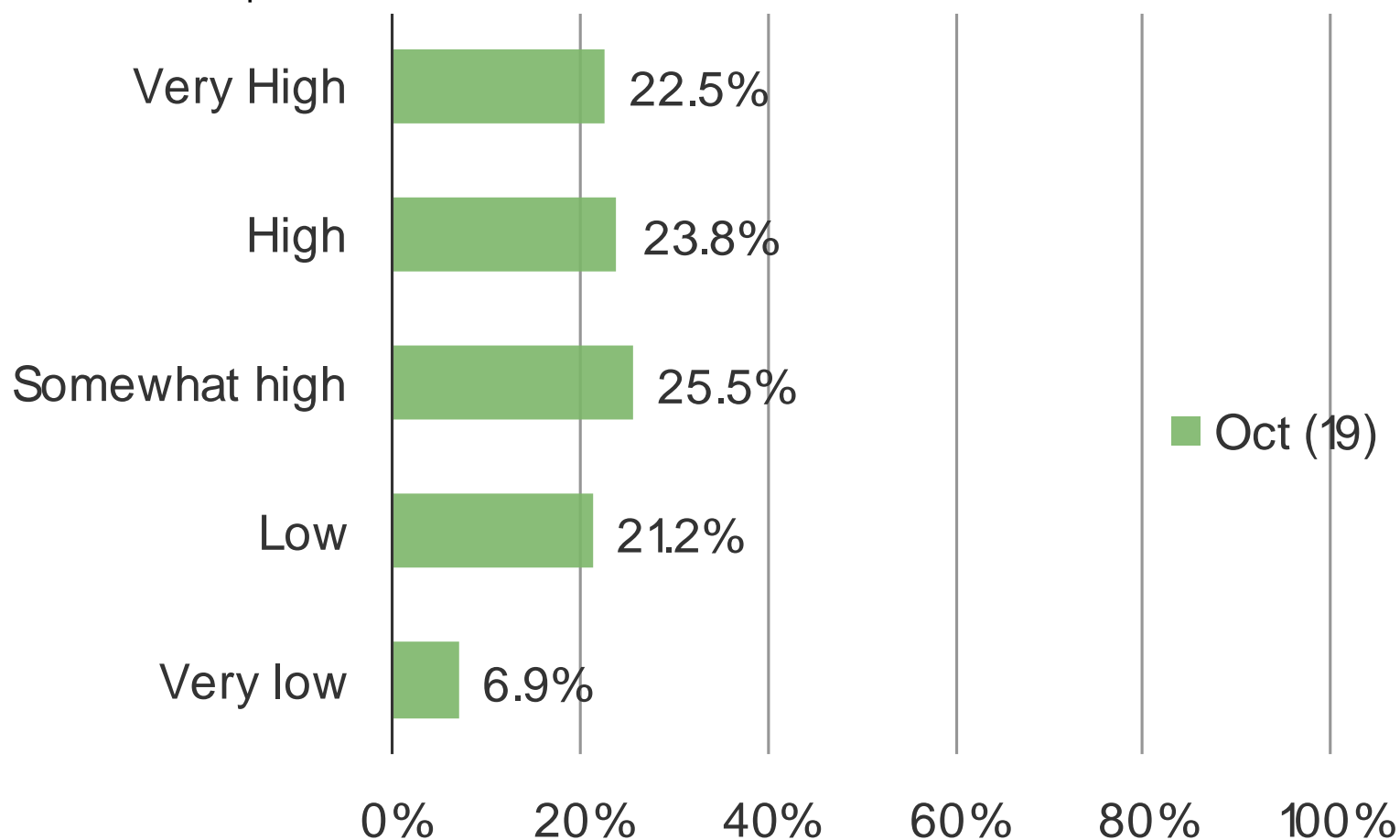
Posed to all respondents



## Netflix India

PLEASE EVALUATE YOUR CONFIDENCE ABOUT SPENDING MONEY AT THIS TIME

Posed to all respondents



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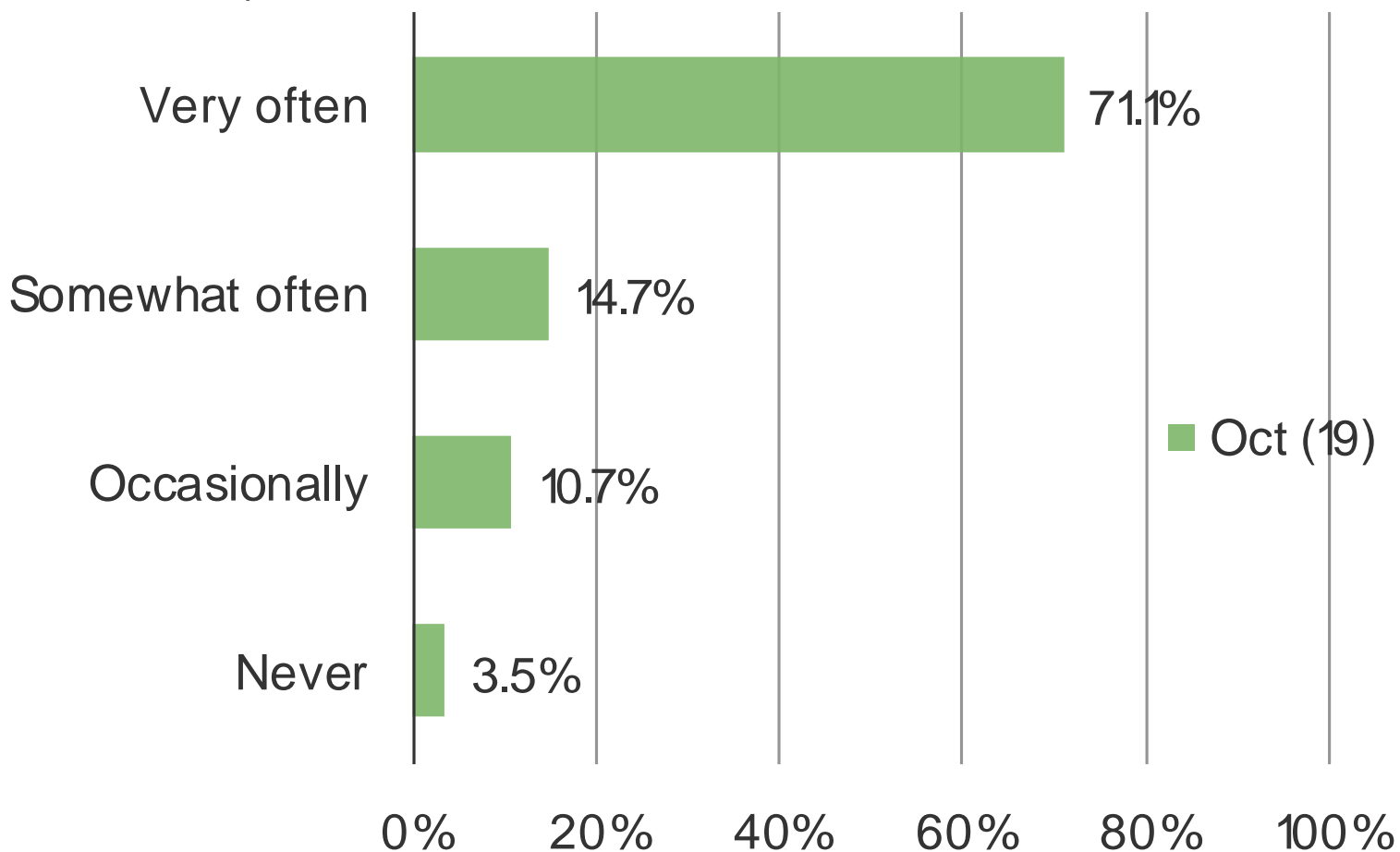
# INTERNET USAGE



Netflix India

## HOW OFTEN DO YOU ACCESS THE INTERNET?

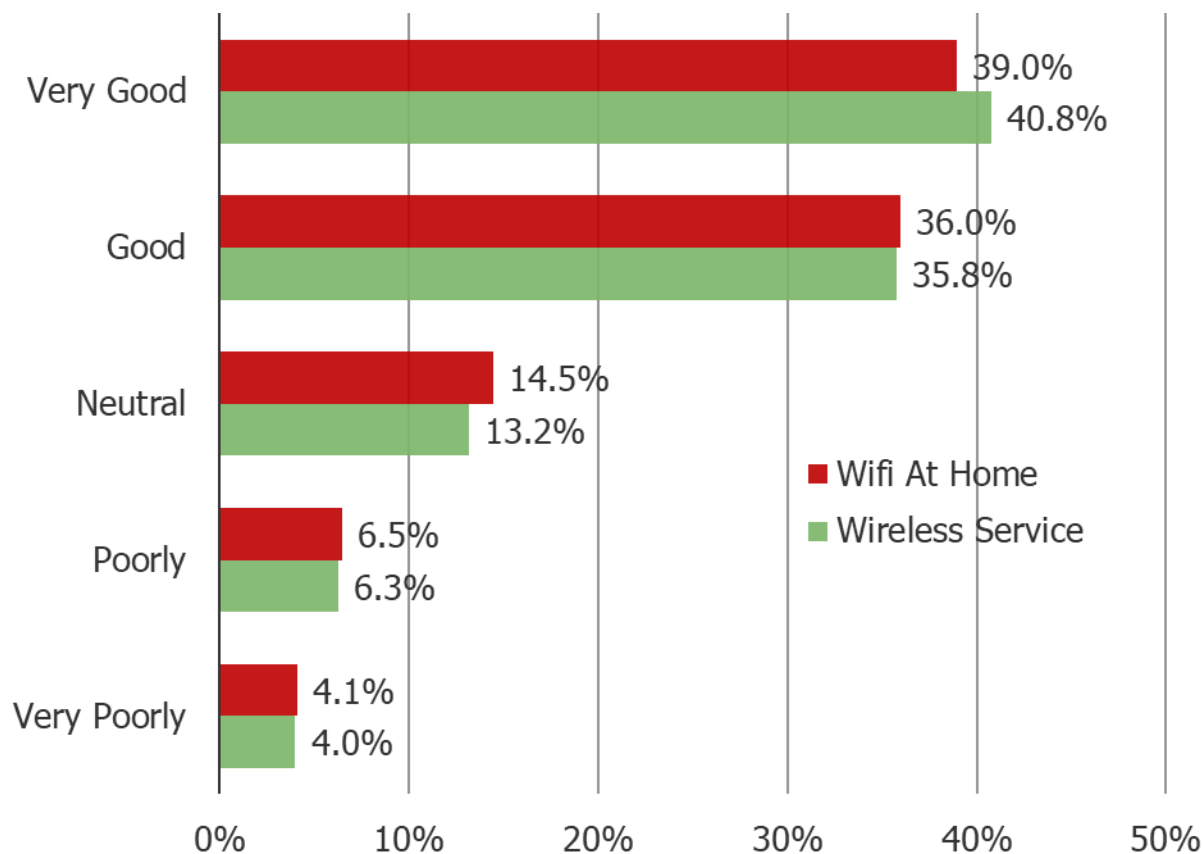
Posed to all respondents



## Netflix India

## HOW WELL DOES THE INTERNET WORK ON YOUR DEVICE?

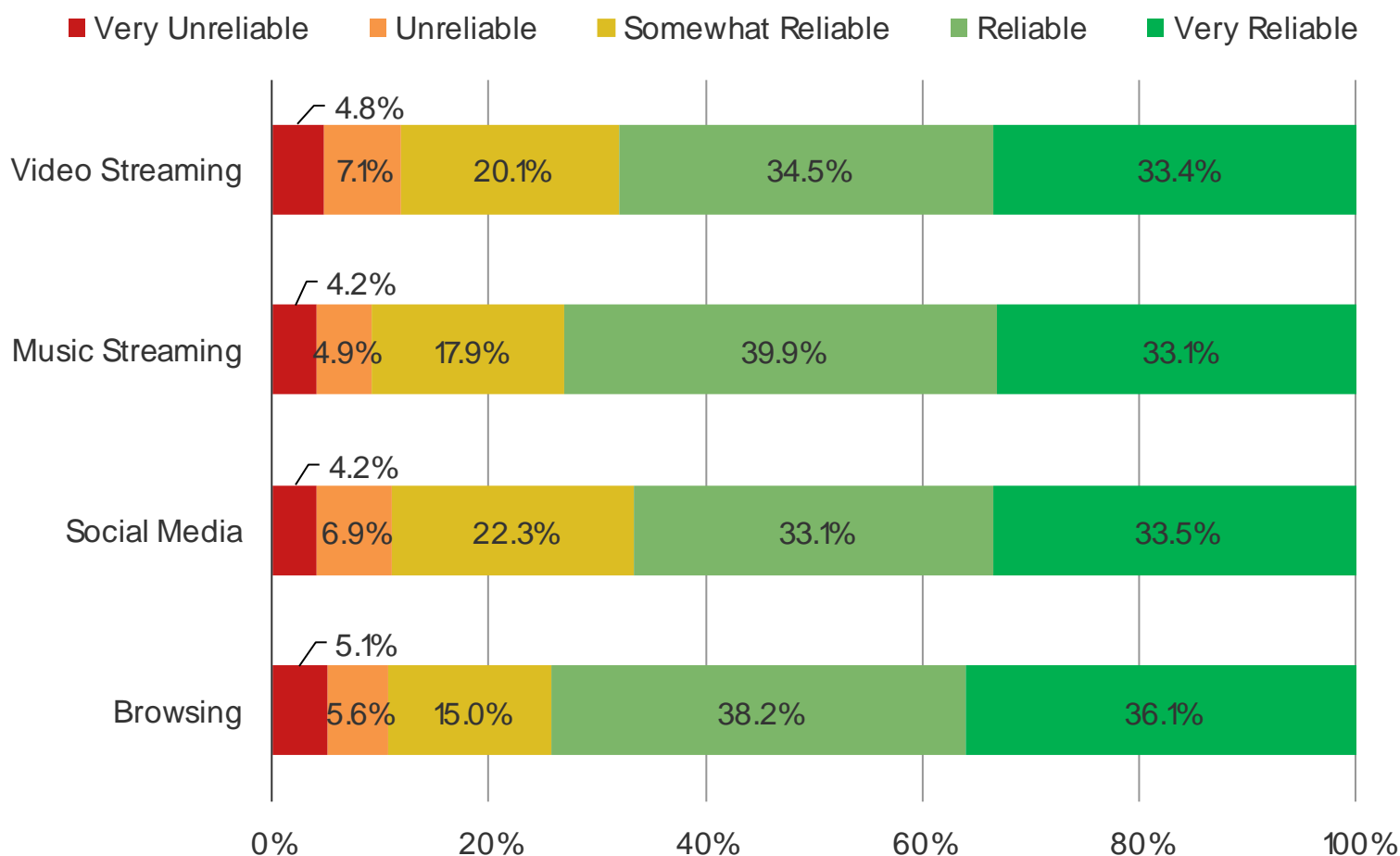
Posed to respondents who at least occasionally access the internet



## Netflix India

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

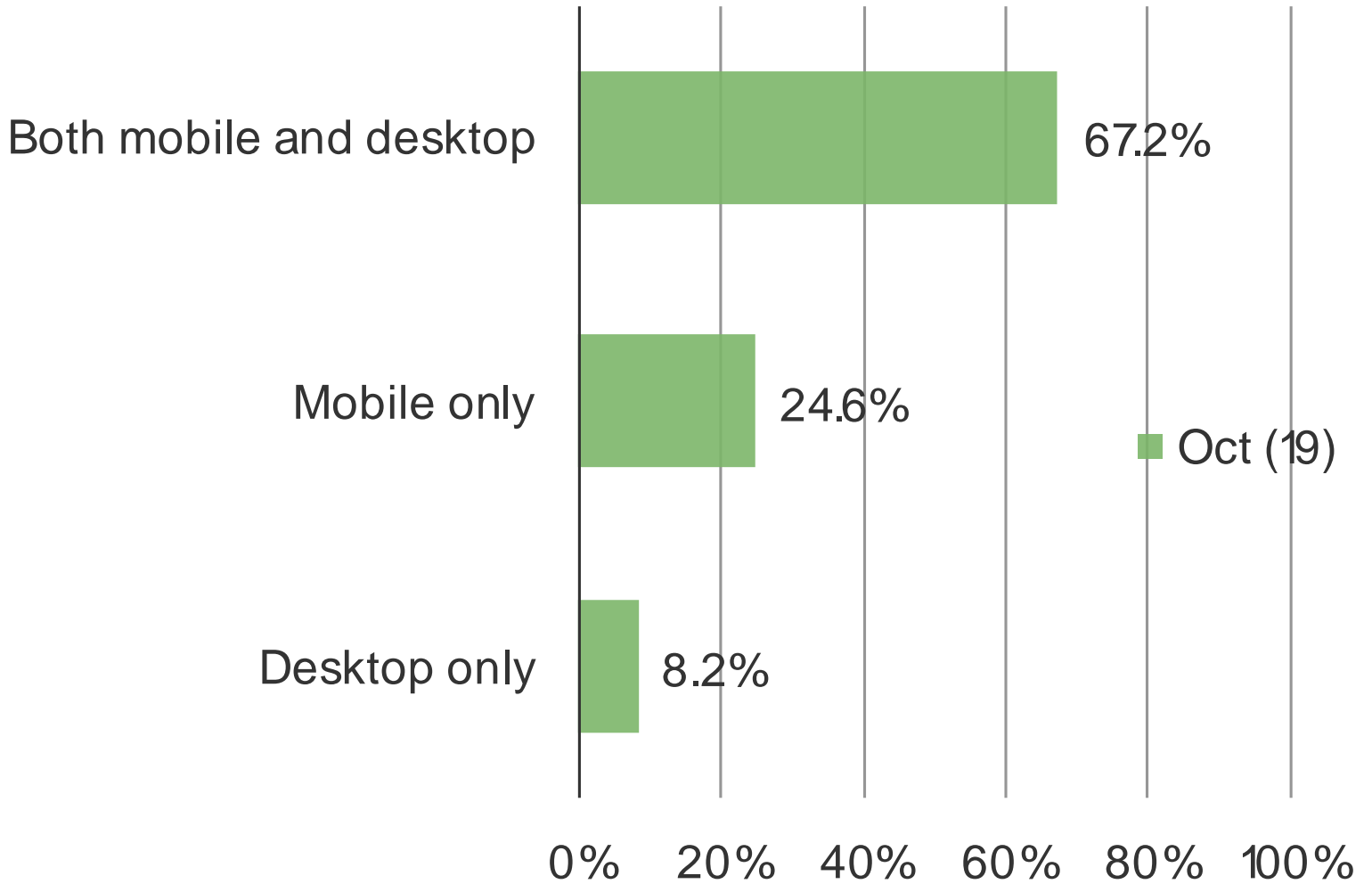
Posed to respondents who at least occasionally access the internet



Netflix India

## HOW DO YOU LIKE ACCESSING THE INTERNET?

Posed to respondents who at least occasionally access the internet



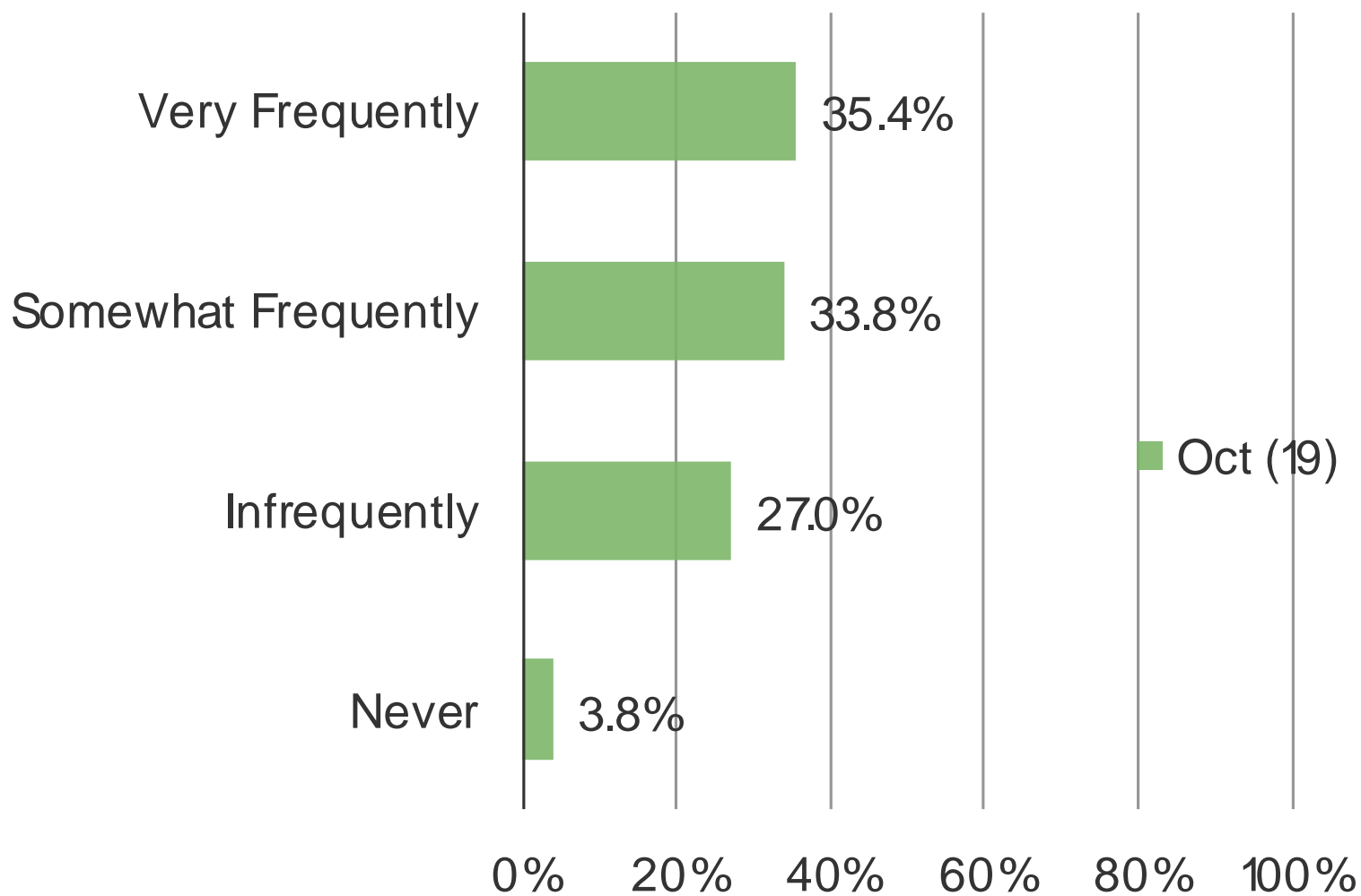
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TV/MOVIE WATCHING

Netflix India

## HOW OFTEN DO YOU WATCH TELEVISION OR MOVIES?

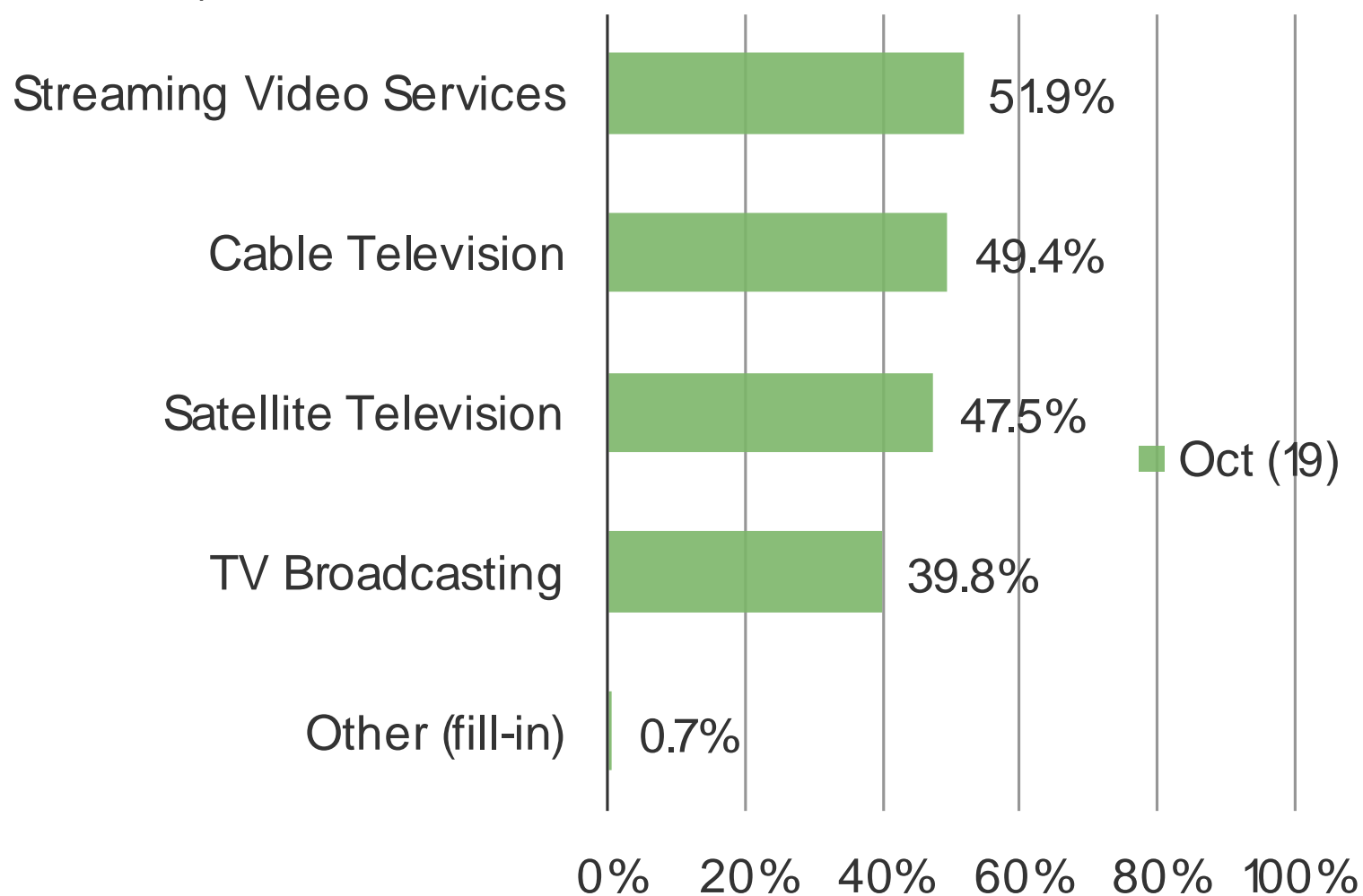
Posed to all respondents



## Netflix India

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

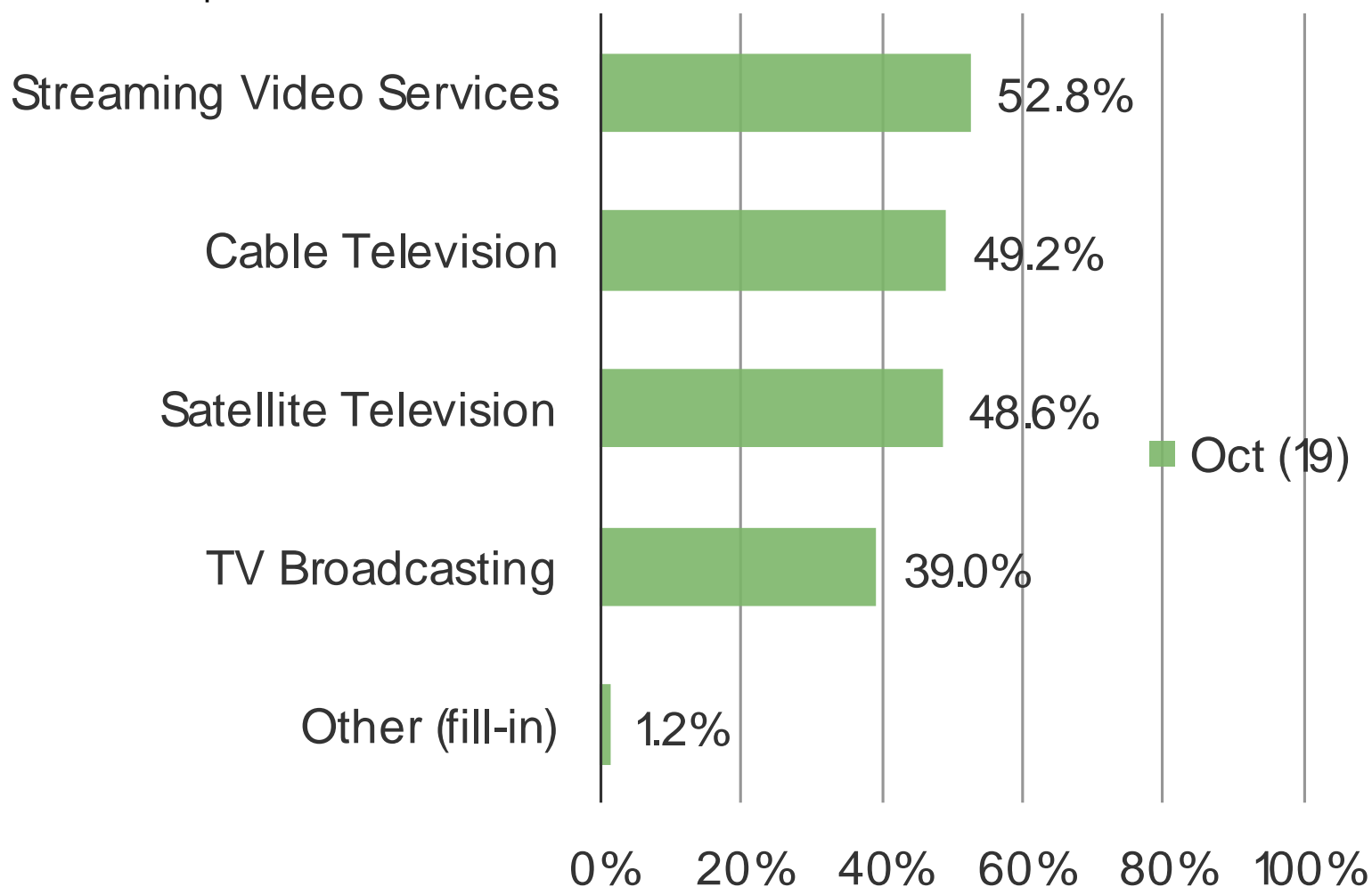
Posed to respondents who watch TV or movies



Netflix India

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

Posed to respondents who watch TV or movies

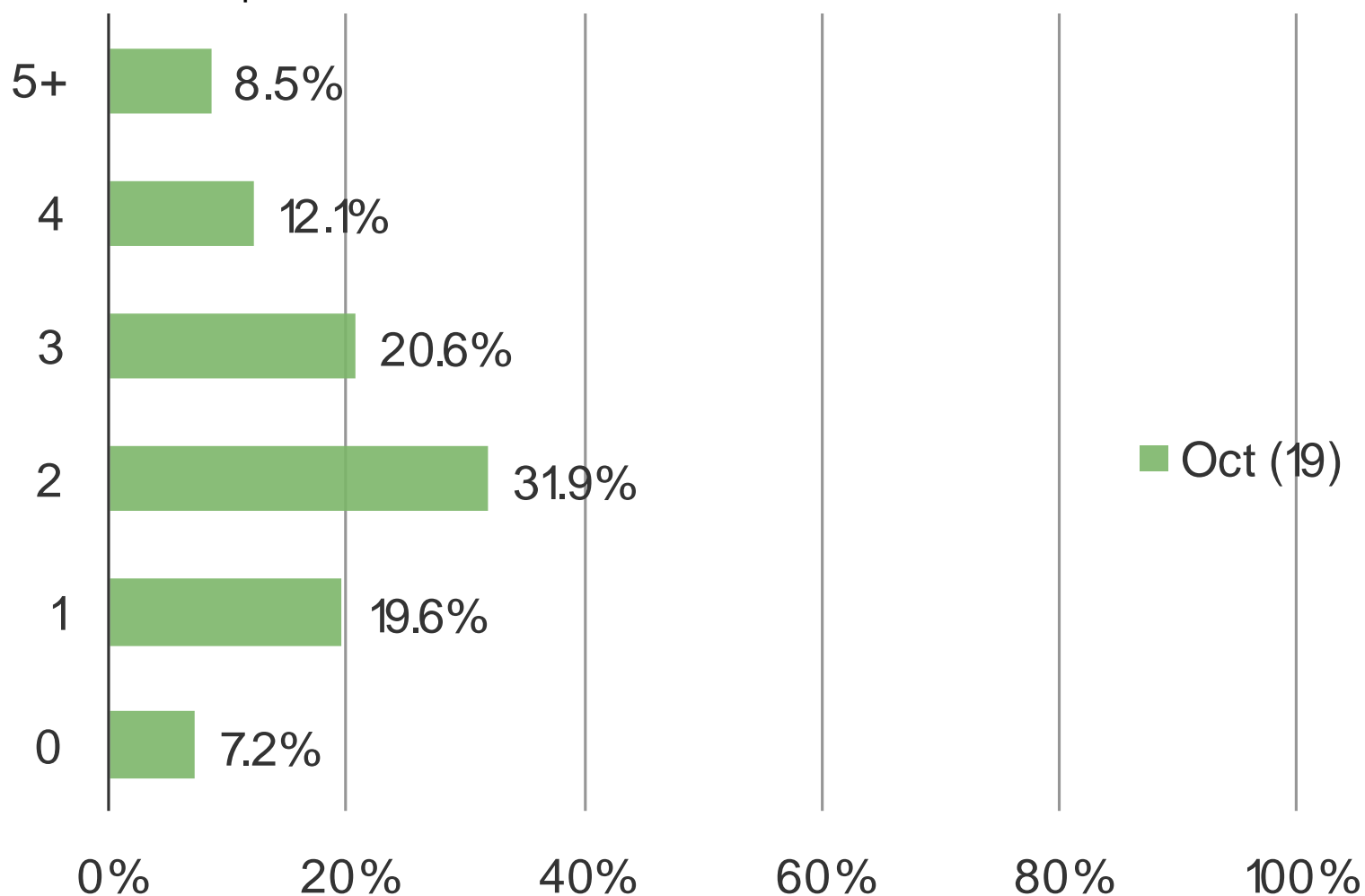




## Netflix India

## HOW MANY STREAMING VIDEO SERVICES DO YOU CURRENTLY USE?

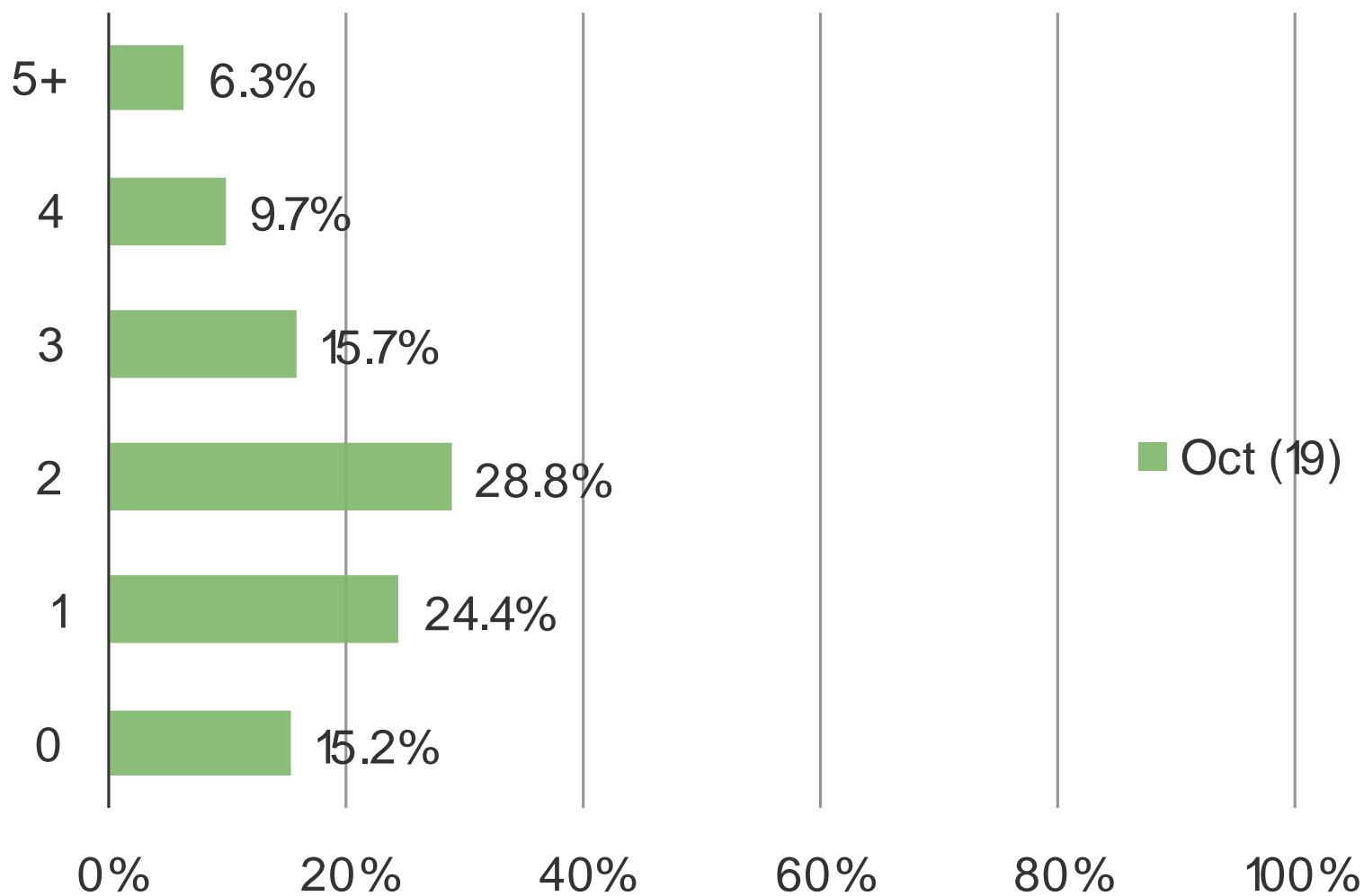
Posed to all respondents



## Netflix India

## HOW MANY STREAMING VIDEO SERVICES DO YOU CURRENTLY PAY FOR?

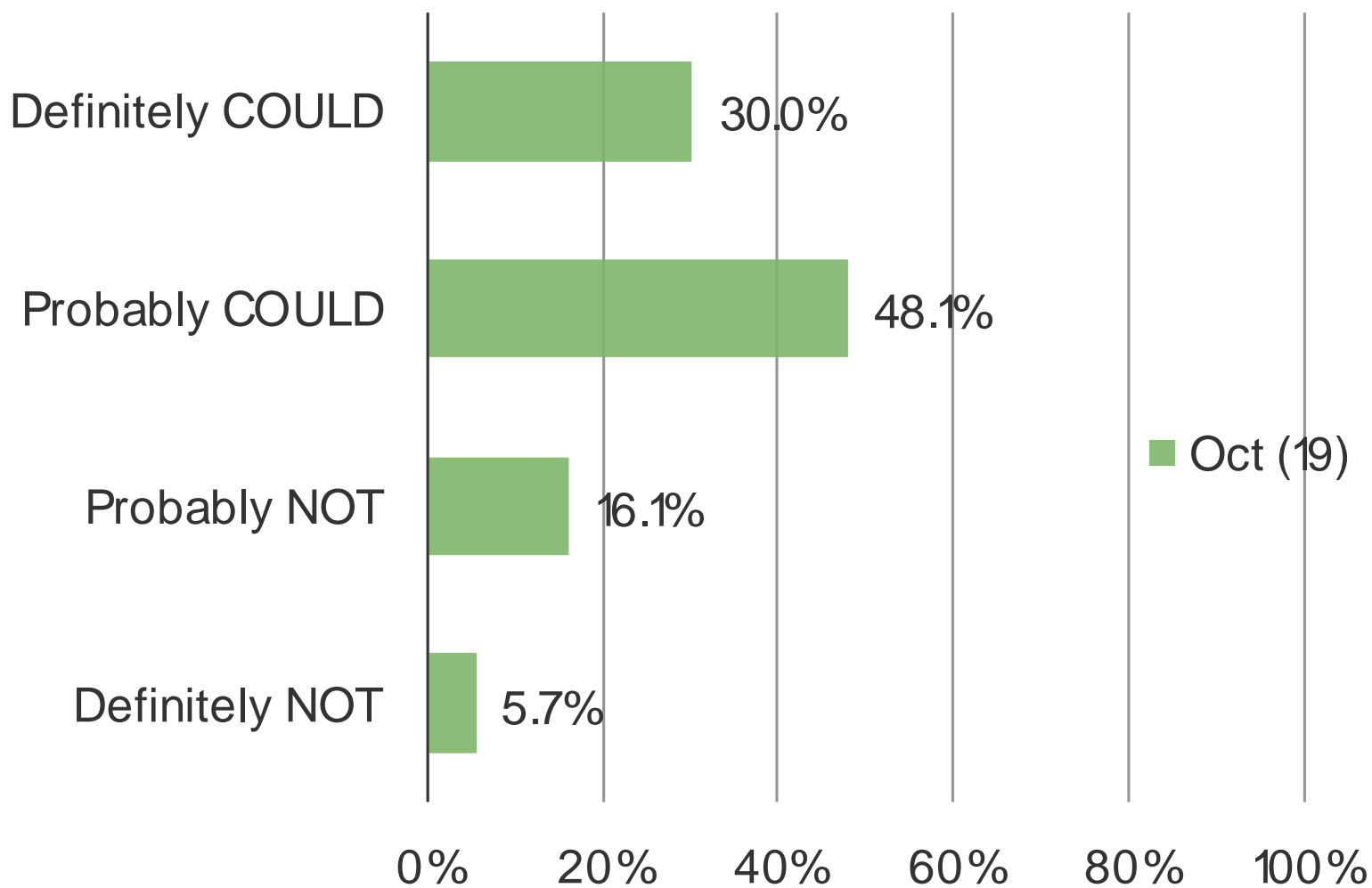
Posed to all respondents



Netflix India

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

Posed to respondents who pay for video streaming services themselves



Netflix India

WHEN YOU THINK OF STREAMING VIDEO SERVICES, WHICH IS THE FIRST THAT COMES TO MIND?

Posed to all respondents





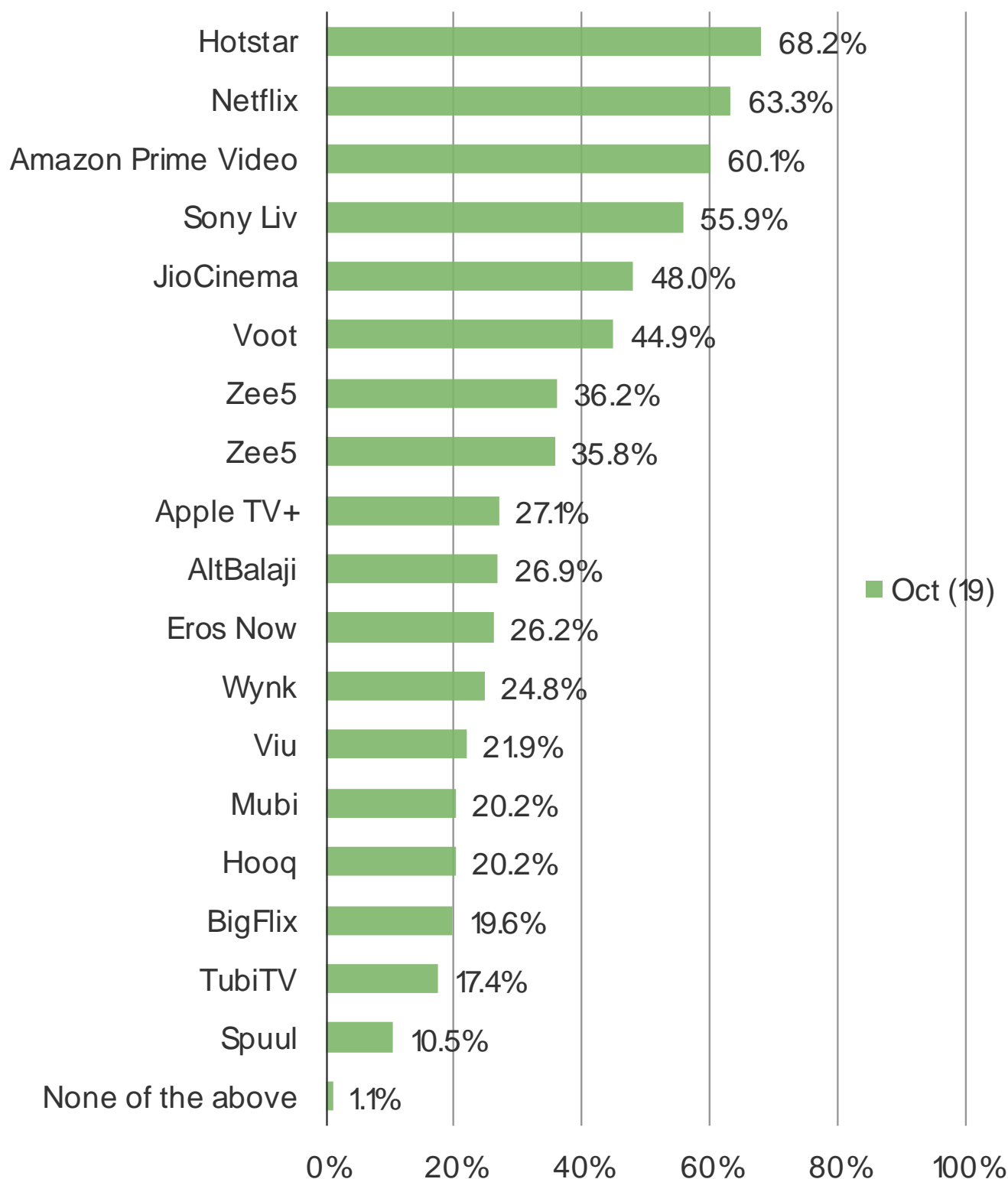
Netflix India

# STREAMING VIDEO AWARENESS AND ACCOUNT HOLDERS

## Netflix India

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

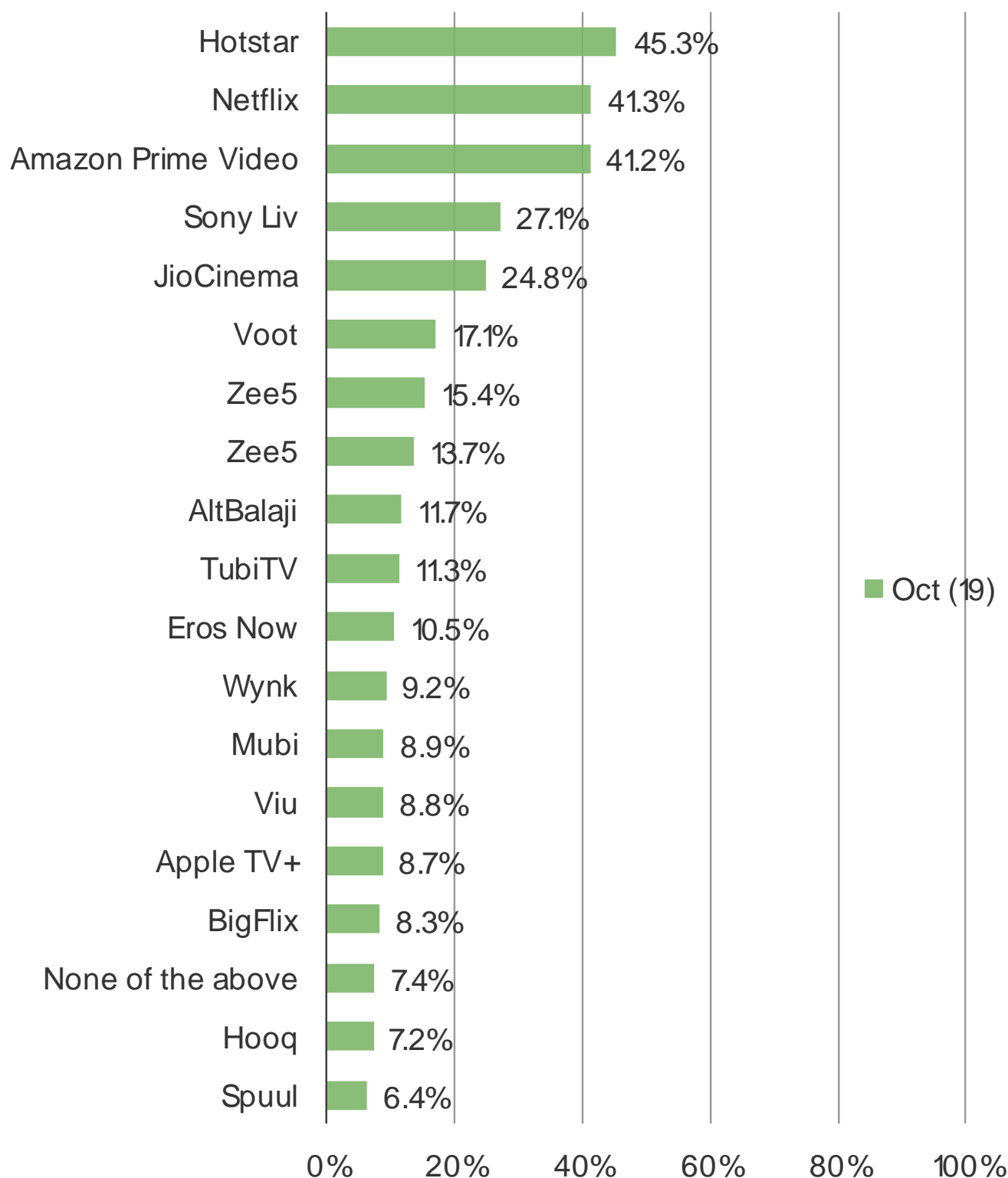
Posed to all respondents



## Netflix India

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

Posed to all respondents





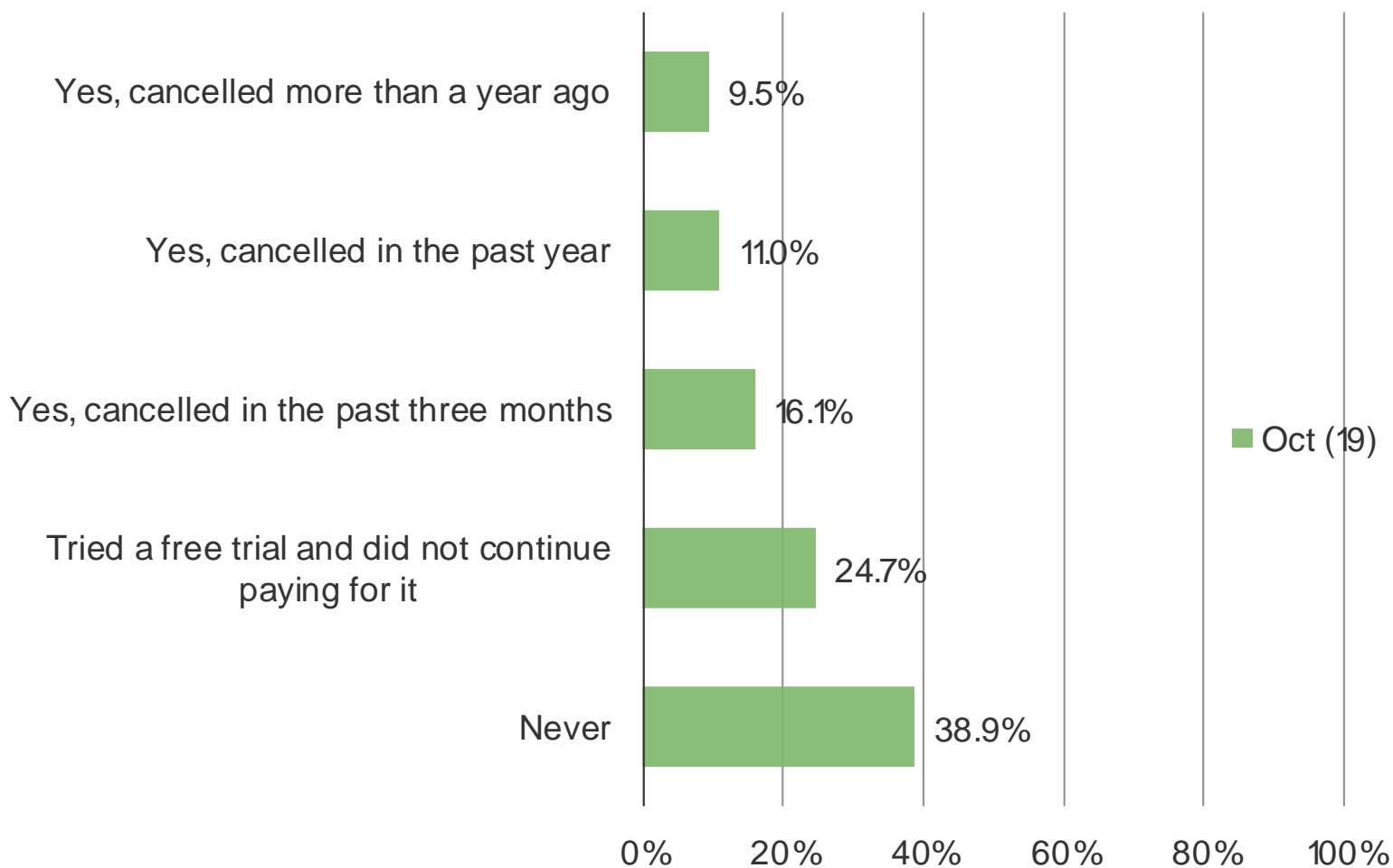
Netflix India

NON-NETFLIX SUBSCRIBERS

## Netflix India

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

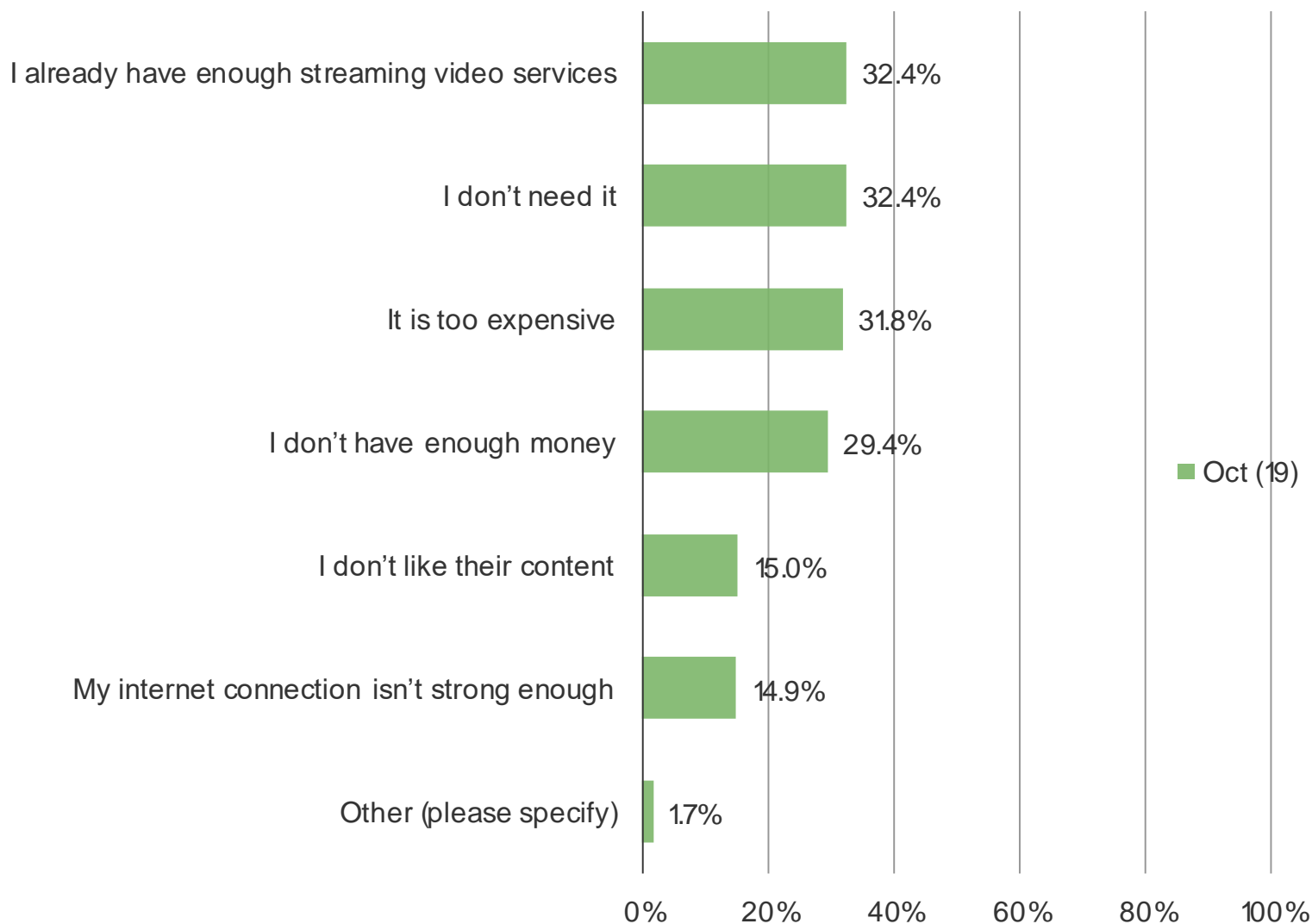
Posed to non-Netflix subscribers



## Netflix India

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

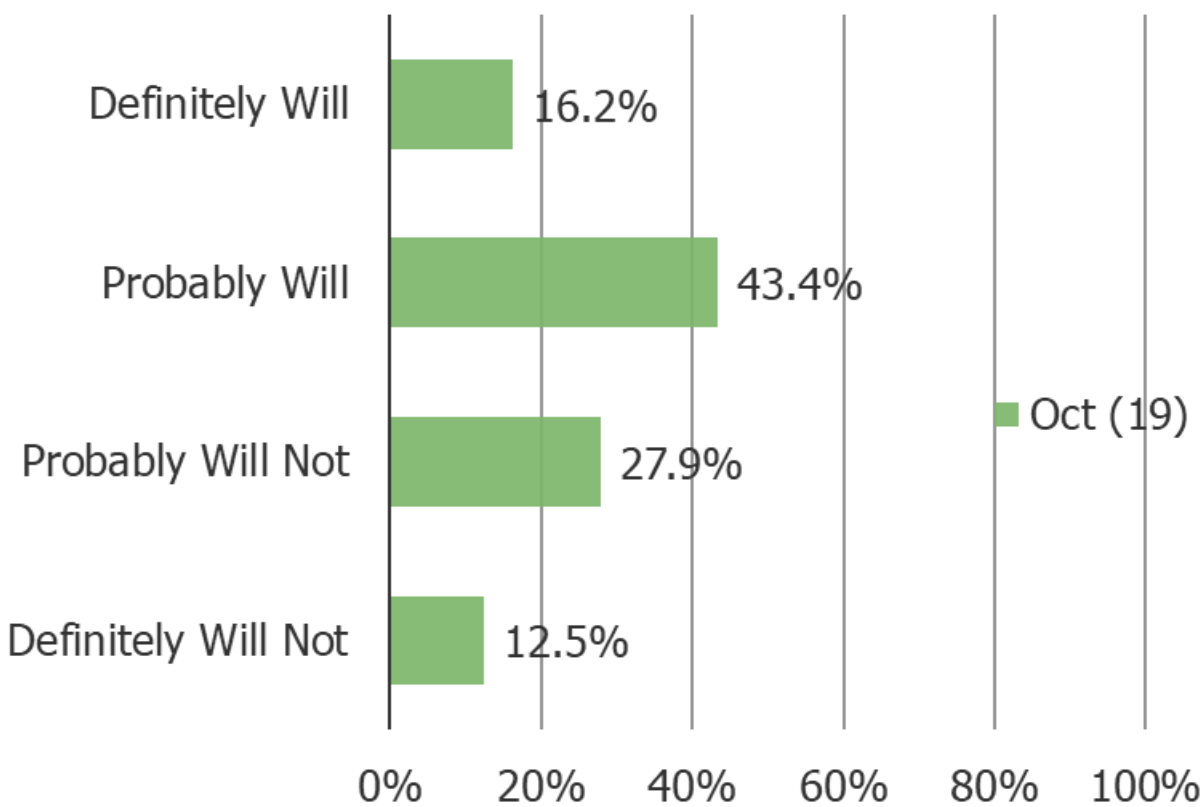
Posed to non-Netflix subscribers



## Netflix India

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

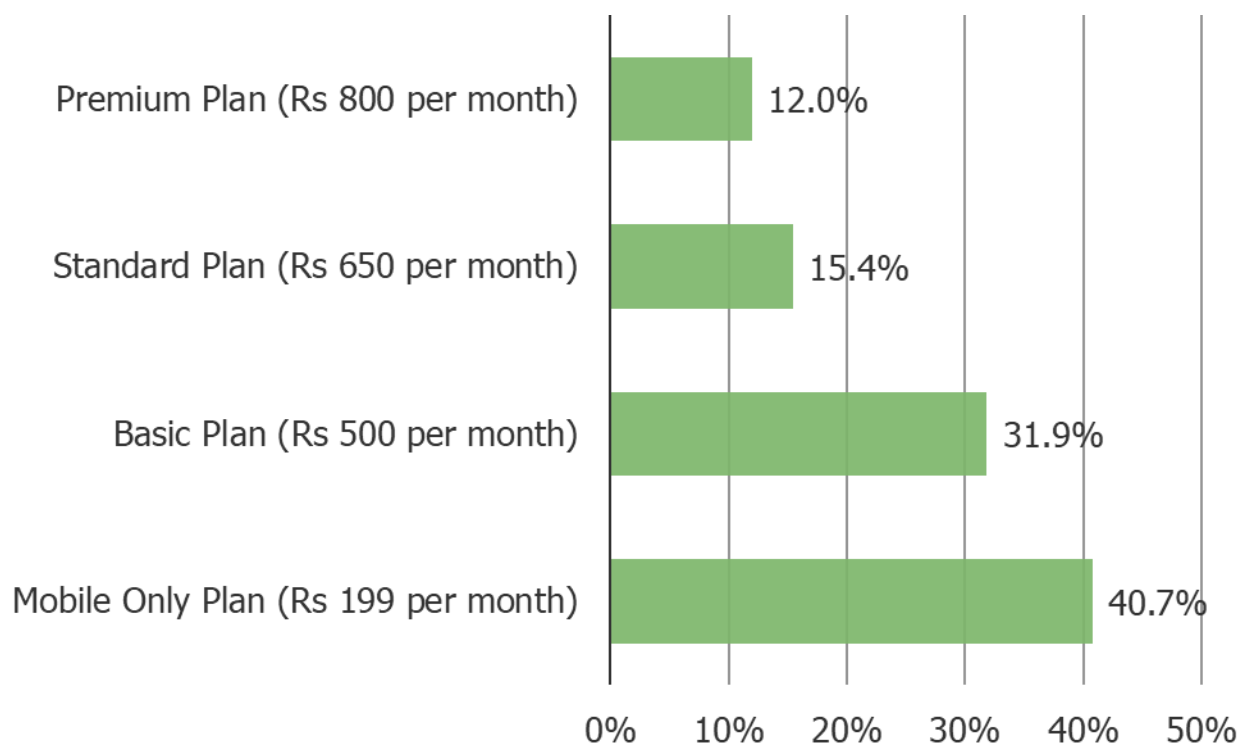
Posed to non-Netflix subscribers



## Netflix India

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

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

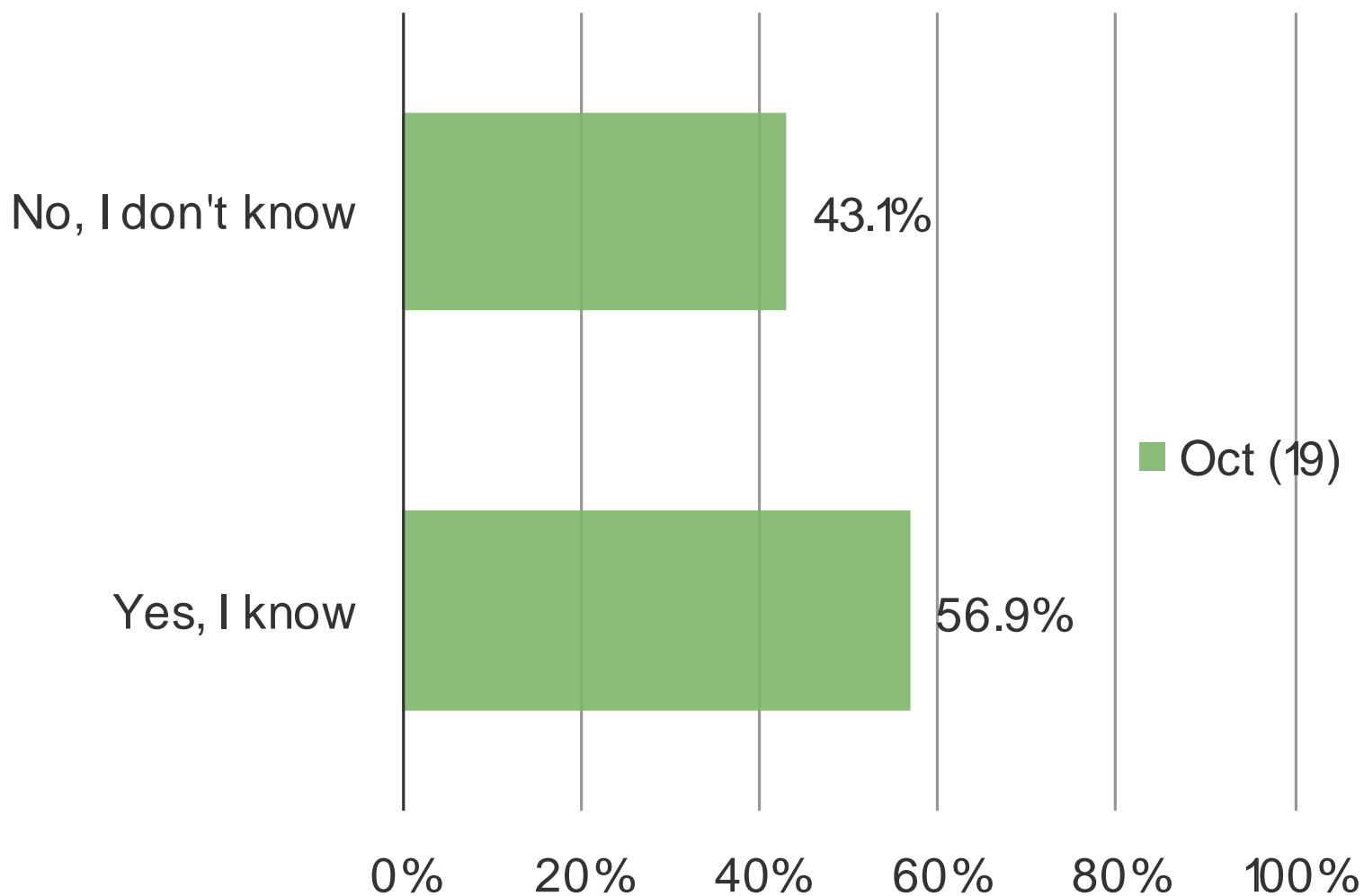


[illegible]

## Netflix India

DID YOU KNOW THAT NETFLIX HAS STARTED TO OFFER FREE ACCESS TO A LIMITED NUMBER OF ORIGINAL SHOWS FOR CONSUMERS IN INDIA?

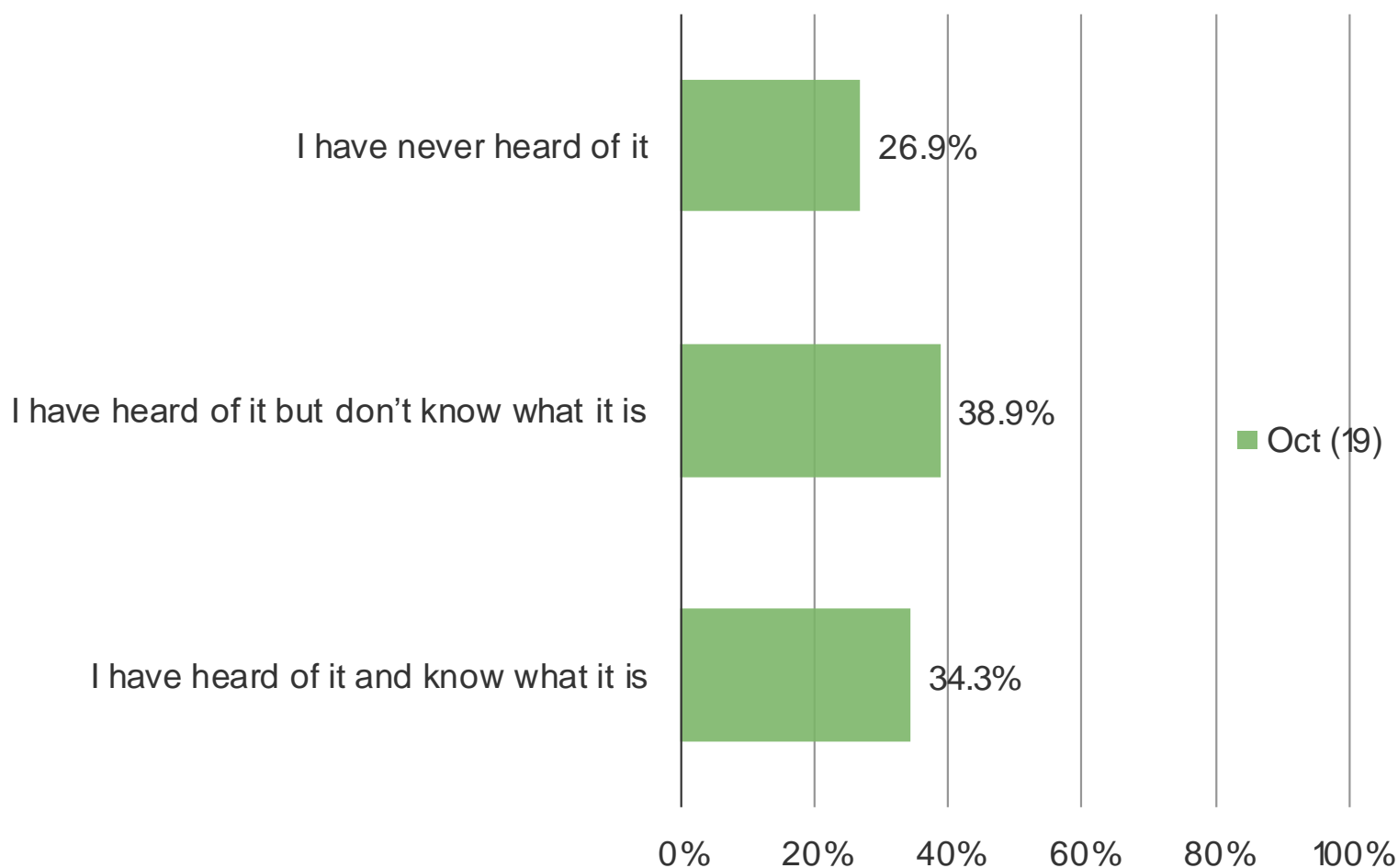
Posed to non-Netflix subscribers



Netflix India

## HAVE YOU HEARD OF THE NETFLIX SHOW “BARD OF BLOOD”?

Posed to non-Netflix subscribers

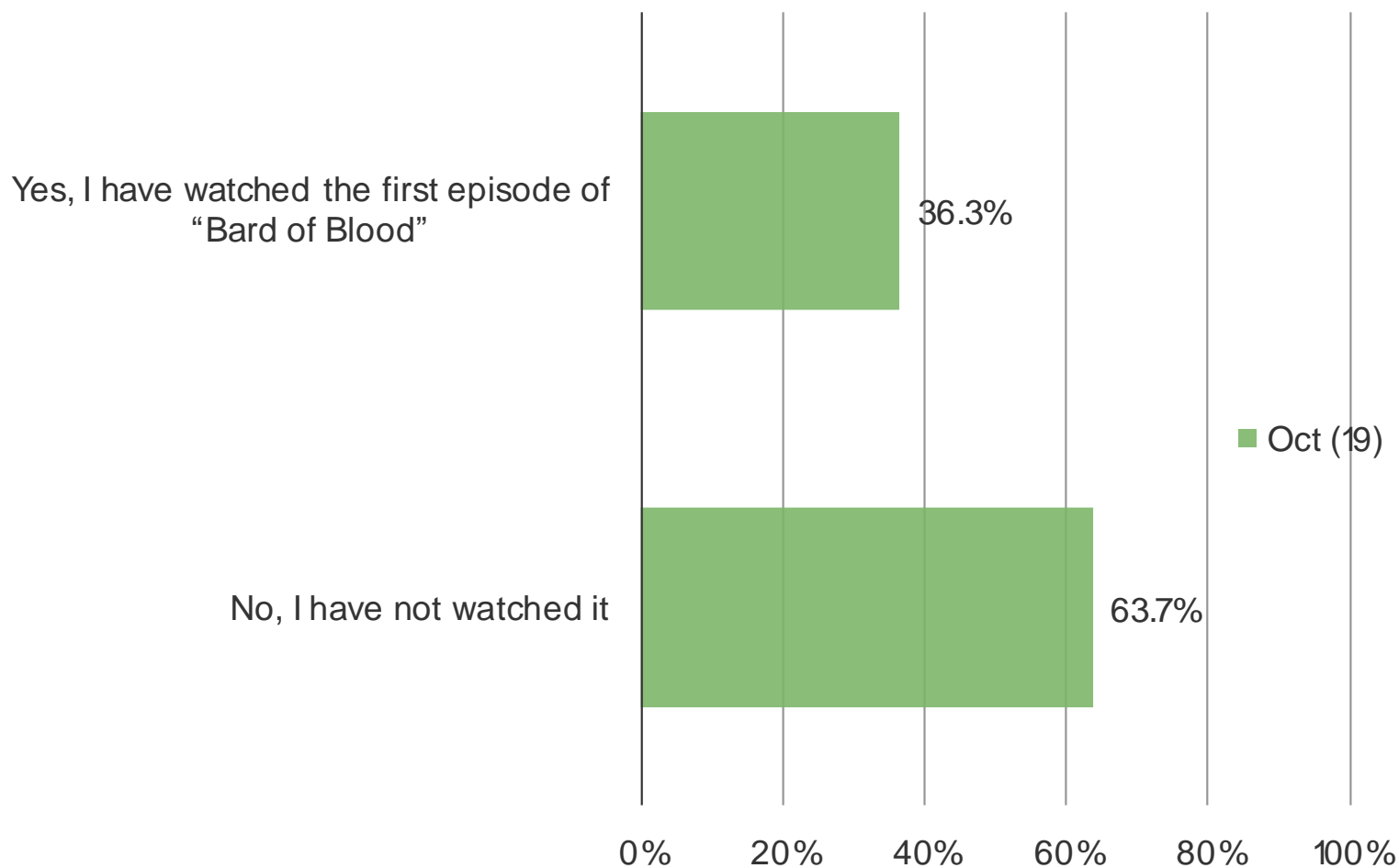




## Netflix India

HAVE YOU WATCHED THE FIRST EPISODE OF THE NETFLIX SERIES “BARD OF BLOOD”?

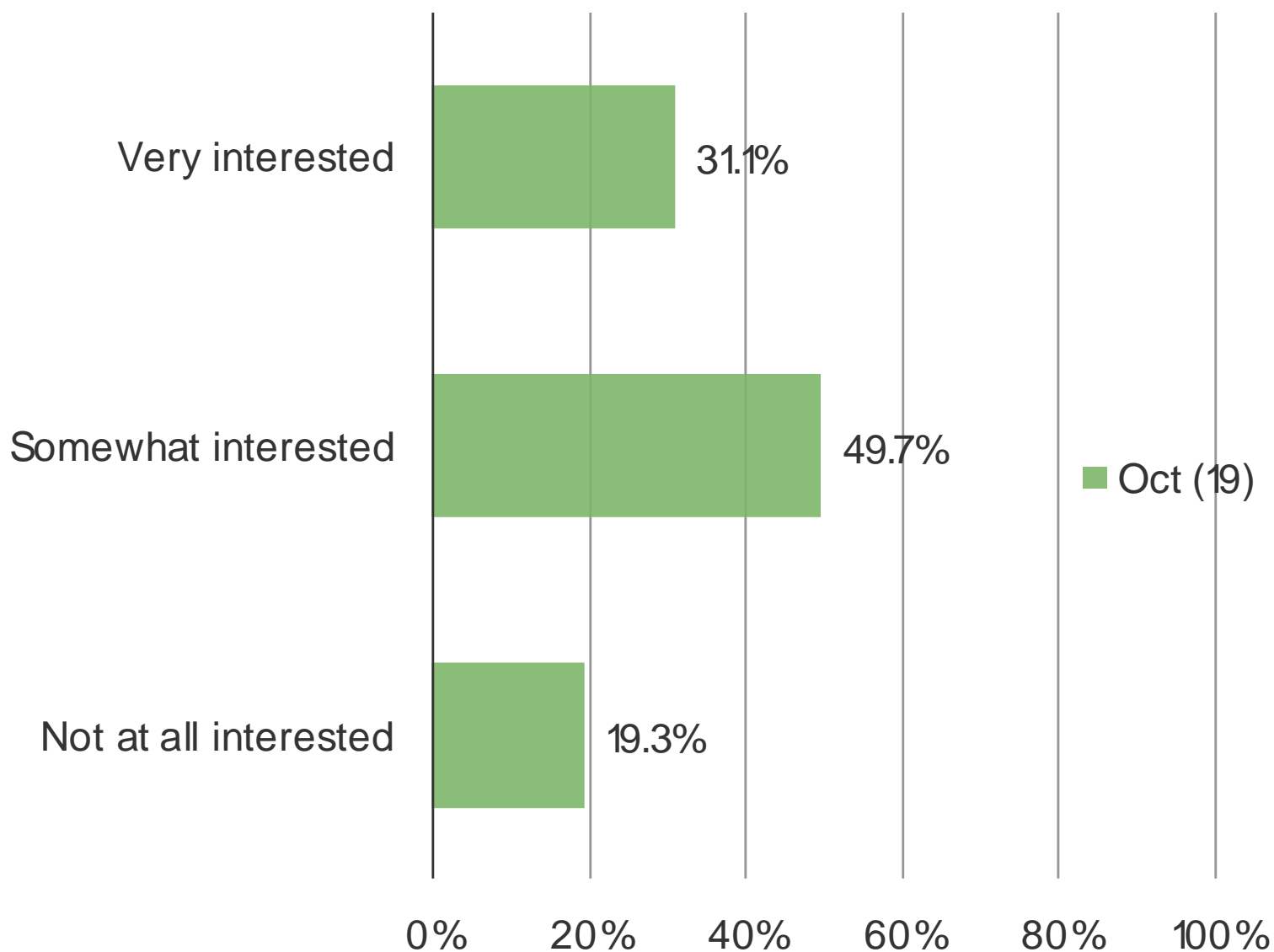
Posed to non-Netflix subscribers



## Netflix India

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

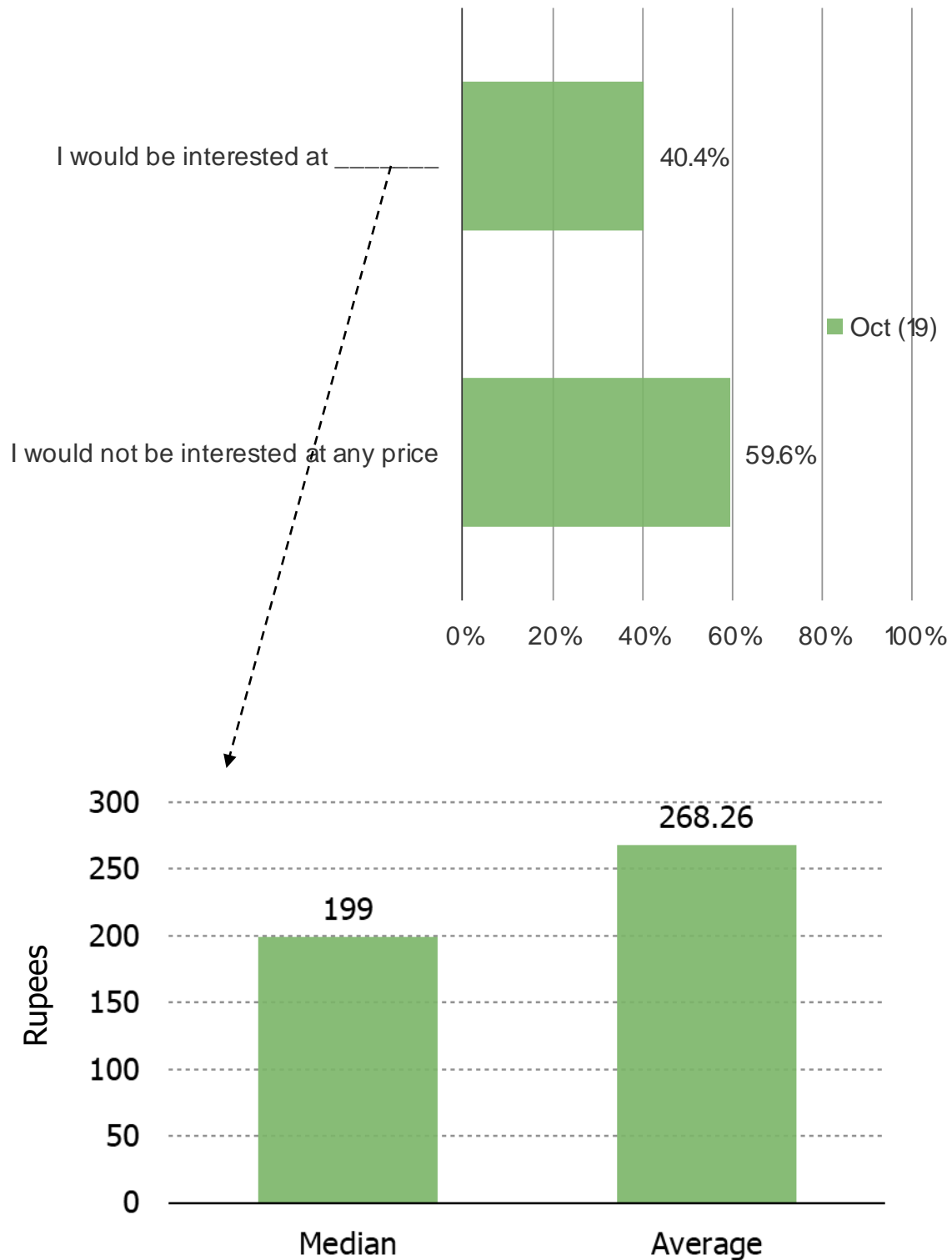
Posed to non-Netflix subscribers



## Netflix India

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

Posed to non-Netflix subscribers

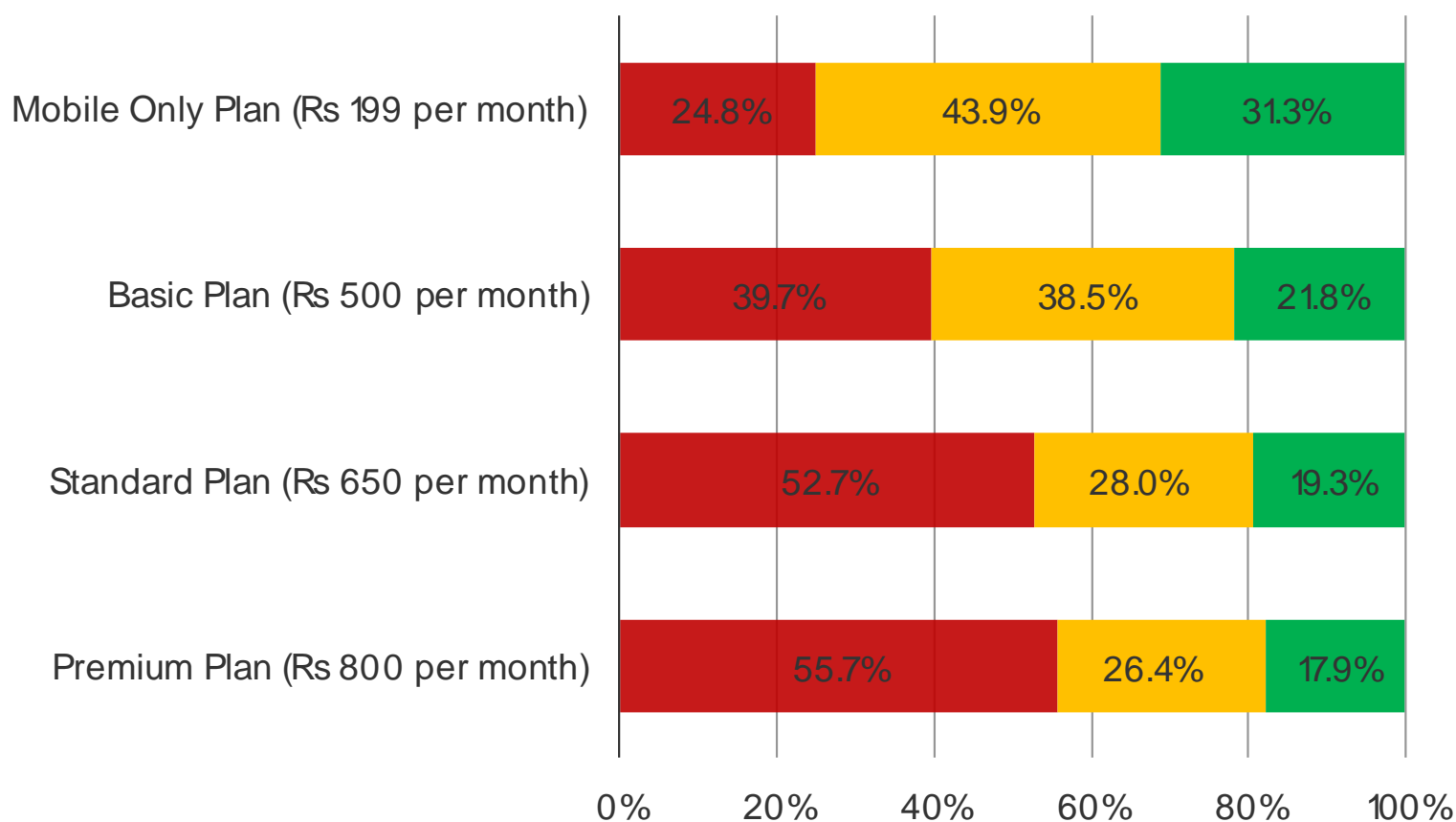


## Netflix India

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

Posed to non-Netflix subscribers

■ Not Interested      ■ Somewhat Interested      ■ Very Interested



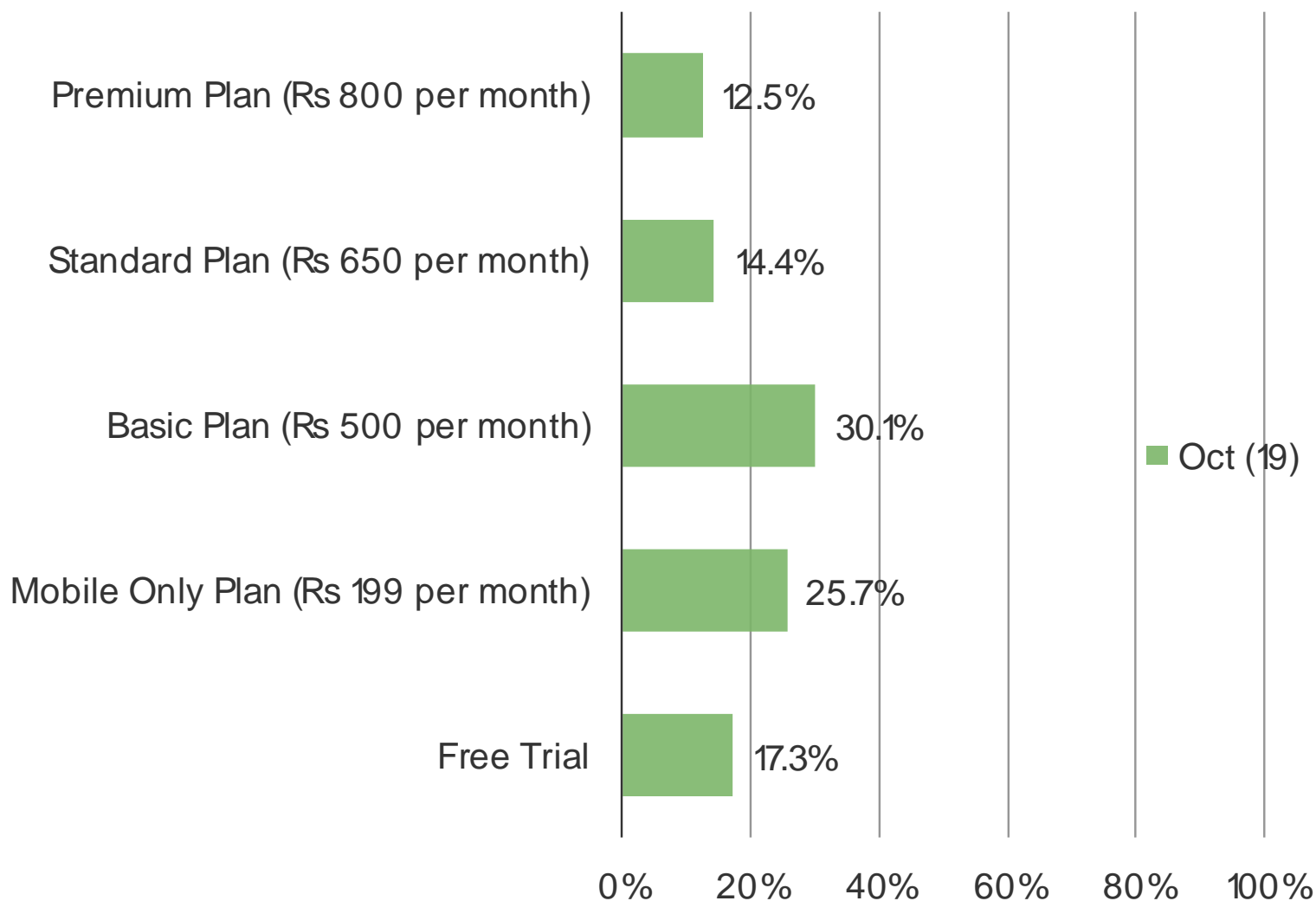
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NETFLIX SUBSCRIBERS

## Netflix India

## WHICH NETFLIX PLAN ARE YOU SUBSCRIBED TO?

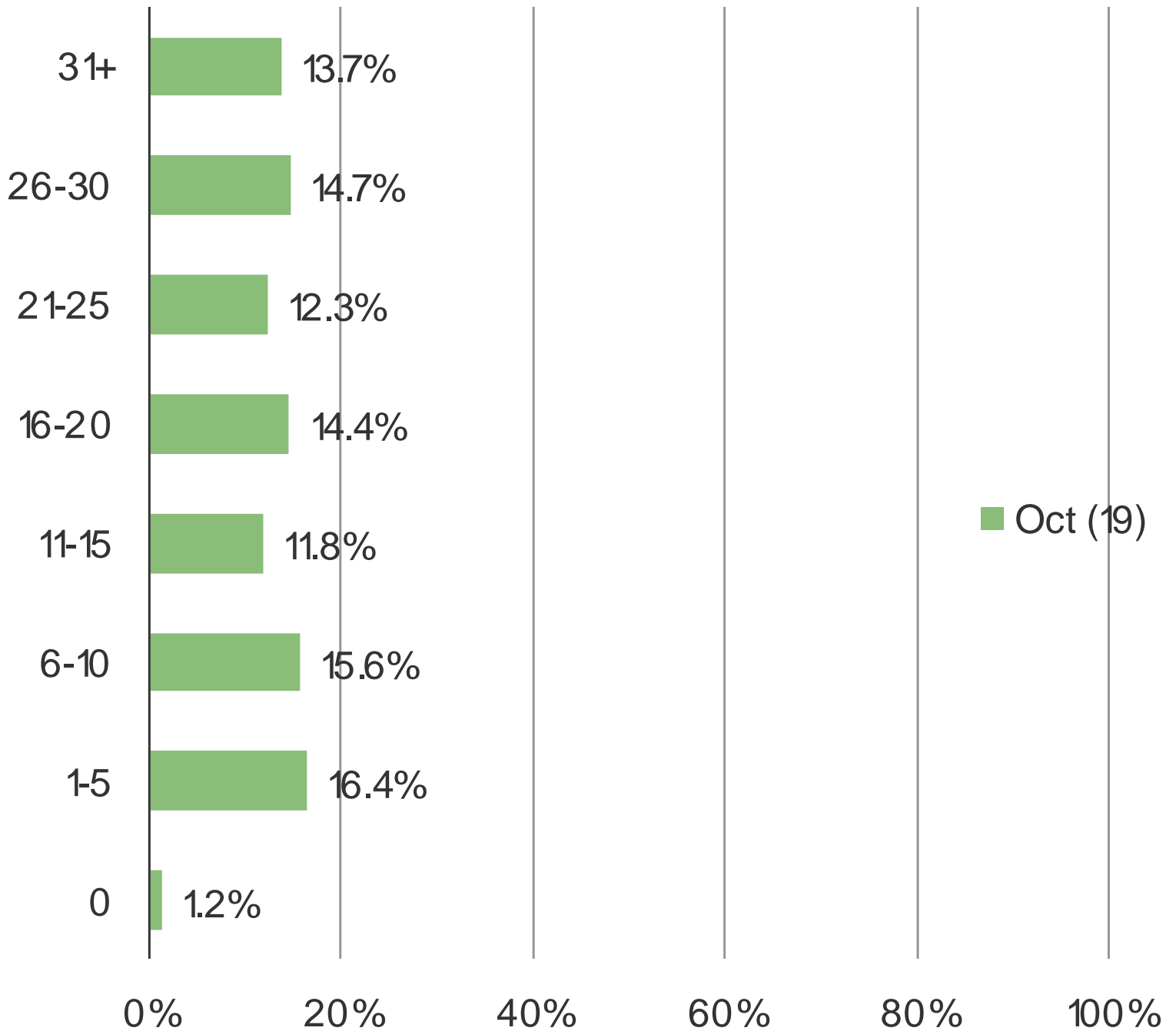
Posed to Netflix subscribers



## Netflix India

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

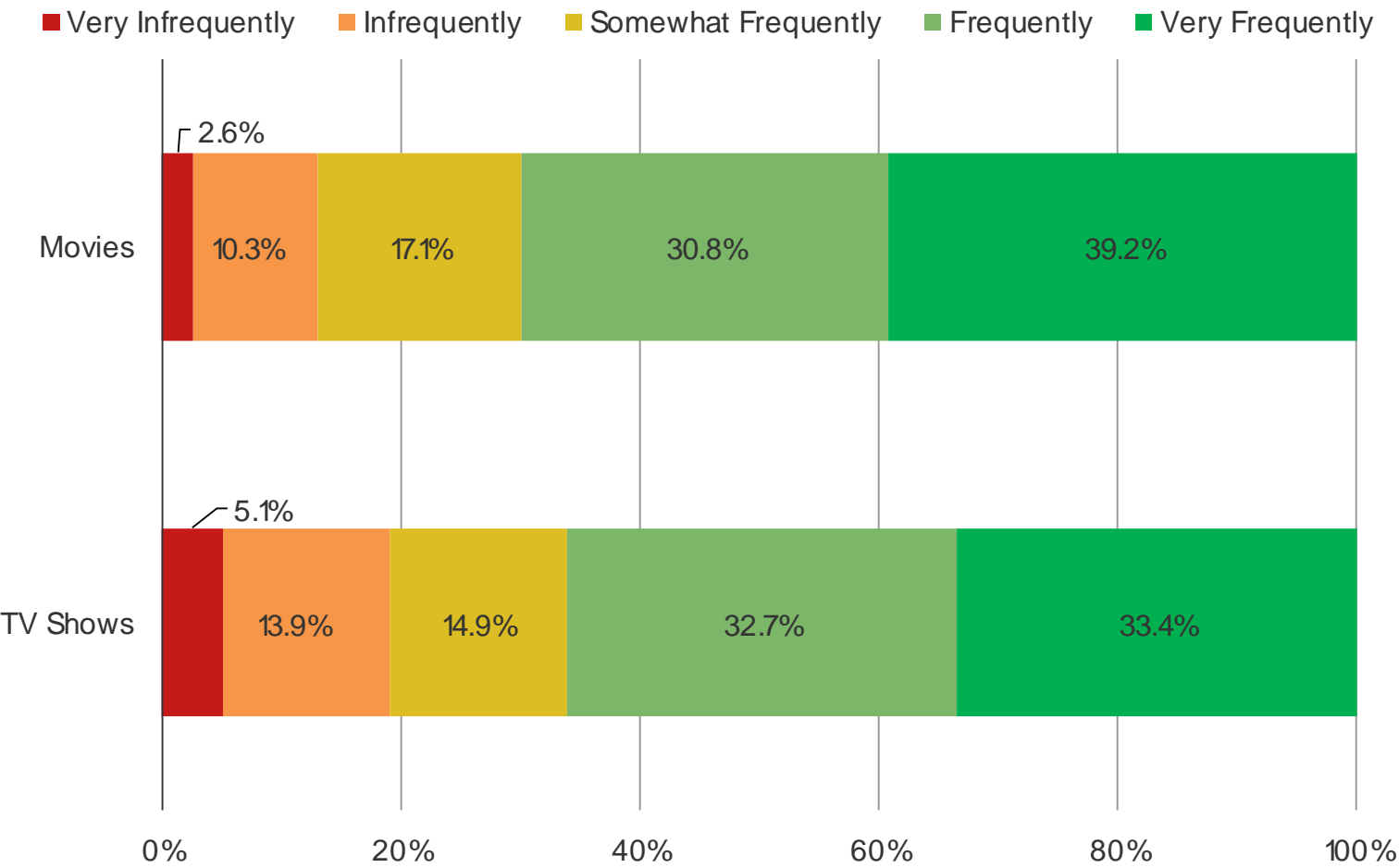
Posed to Netflix subscribers



Netflix India

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

Posed to Netflix subscribers

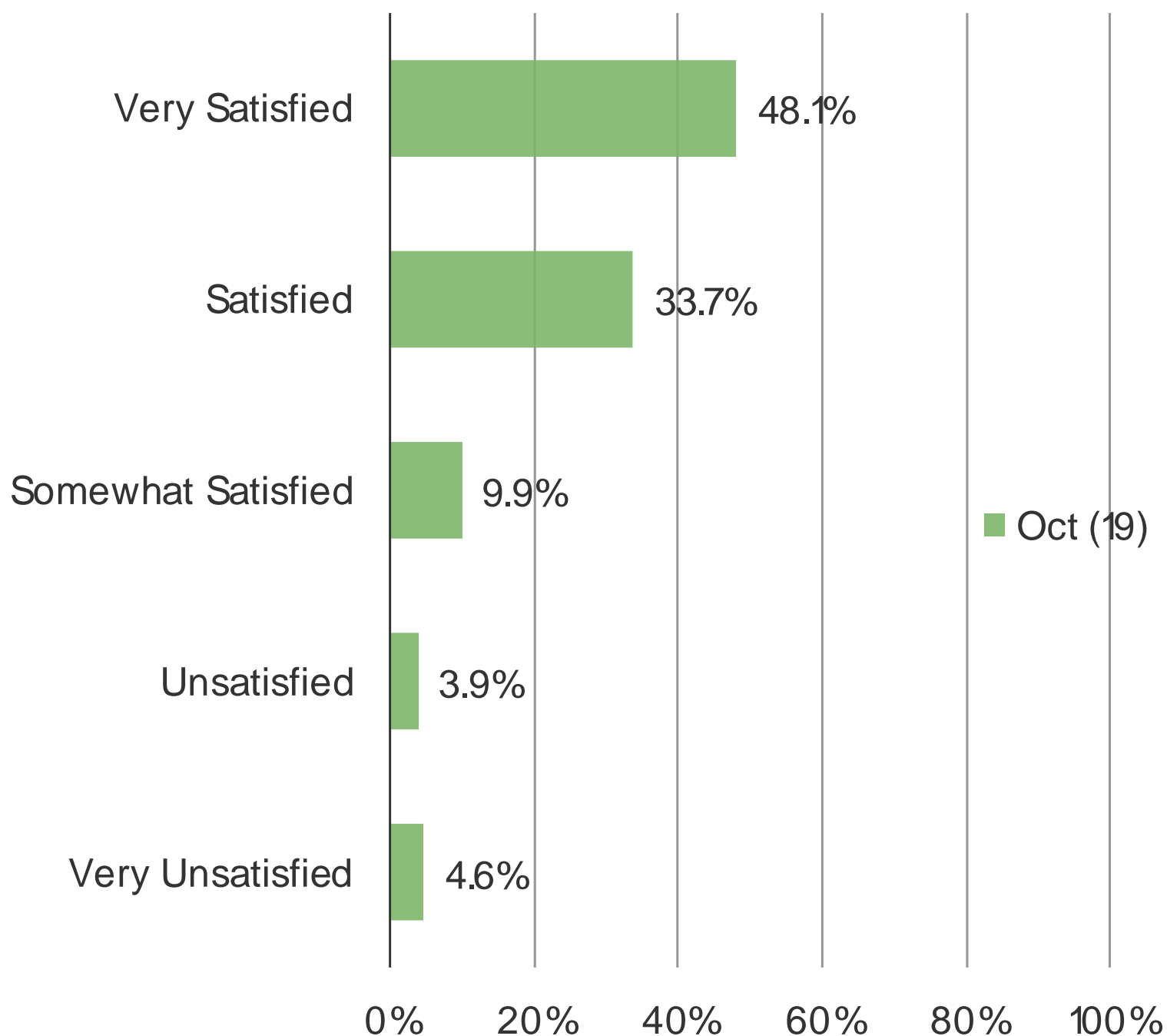




## Netflix India

## HOW SATISFIED ARE YOU WITH YOUR NETFLIX SUBSCRIPTION?

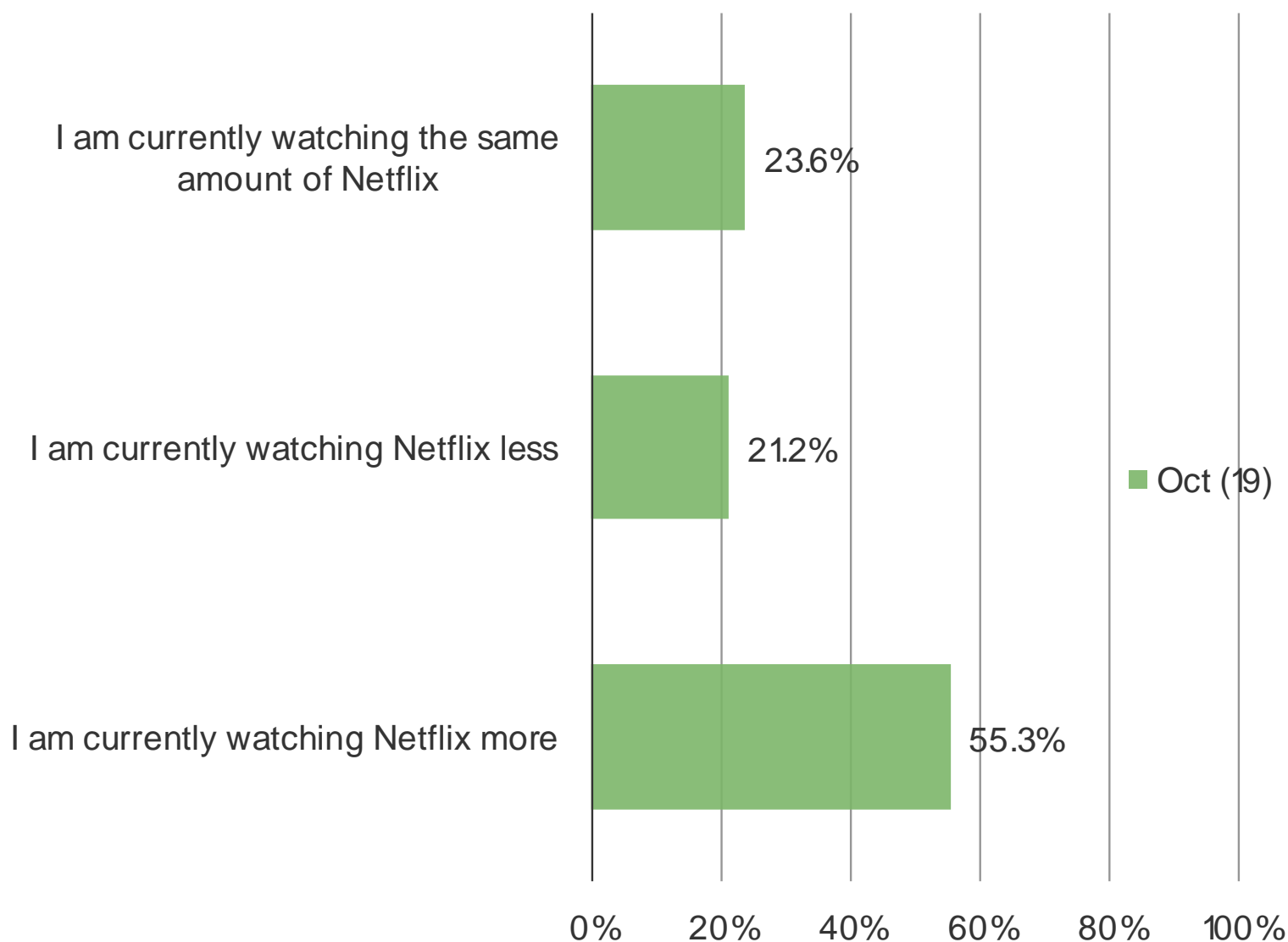
Posed to Netflix subscribers



## Netflix India

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

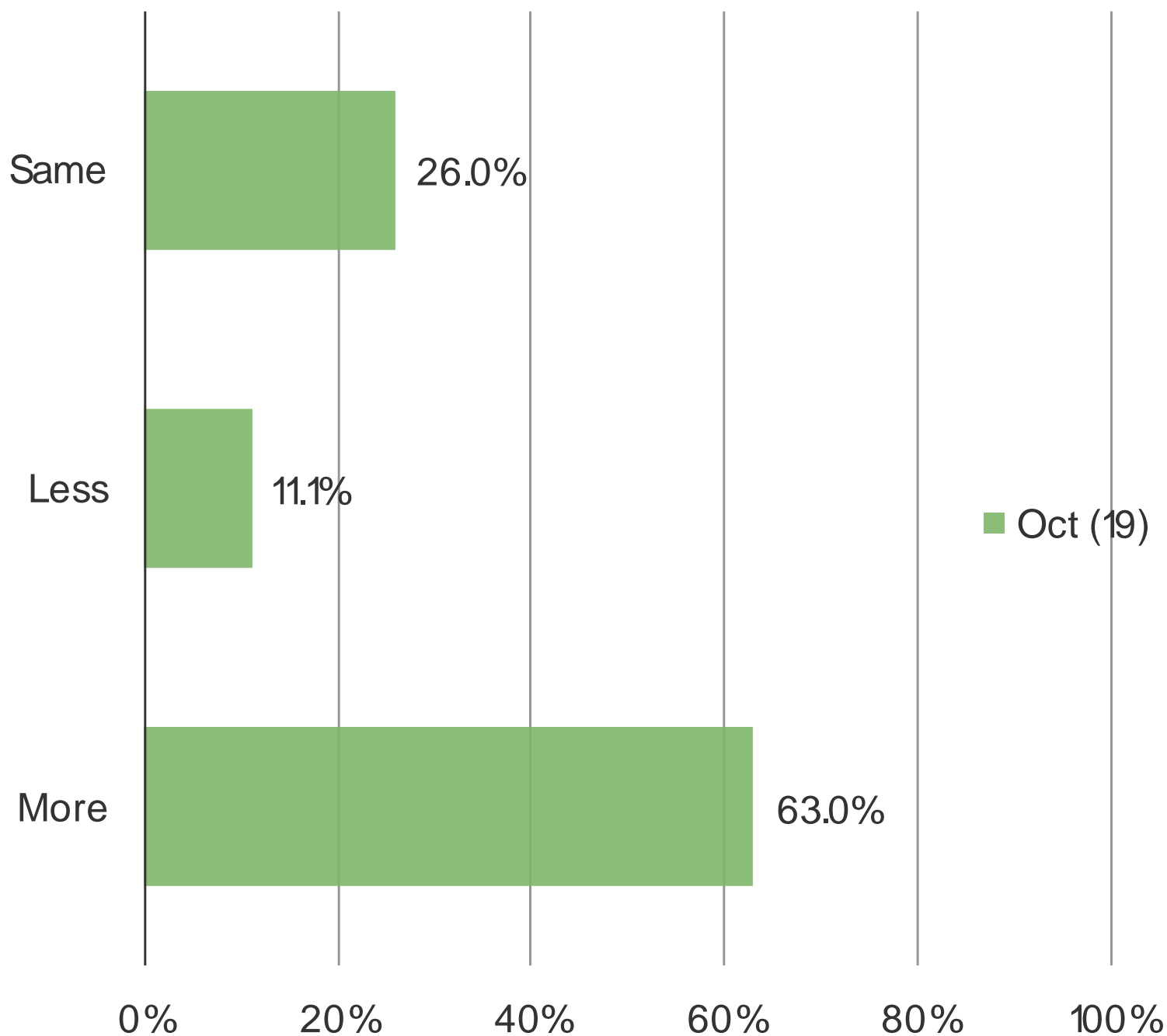
Posed to Netflix subscribers



## Netflix India

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

Posed to Netflix subscribers



## Posed to Netflix subscribers



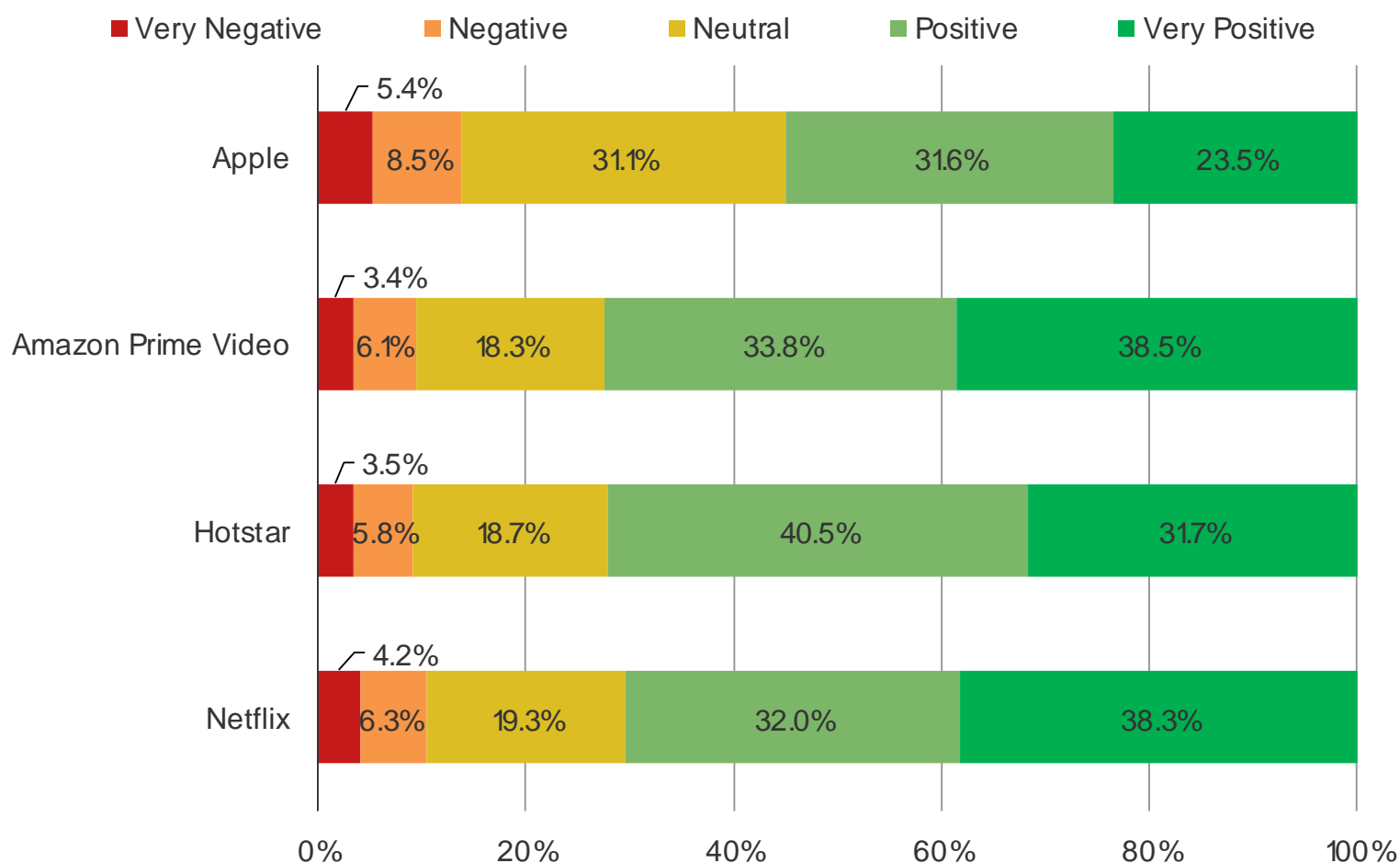
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SENTIMENT AND POPULARITY

## Netflix India

WHAT IS YOUR OPINION OF THE FOLLOWING BRANDS OVERALL?

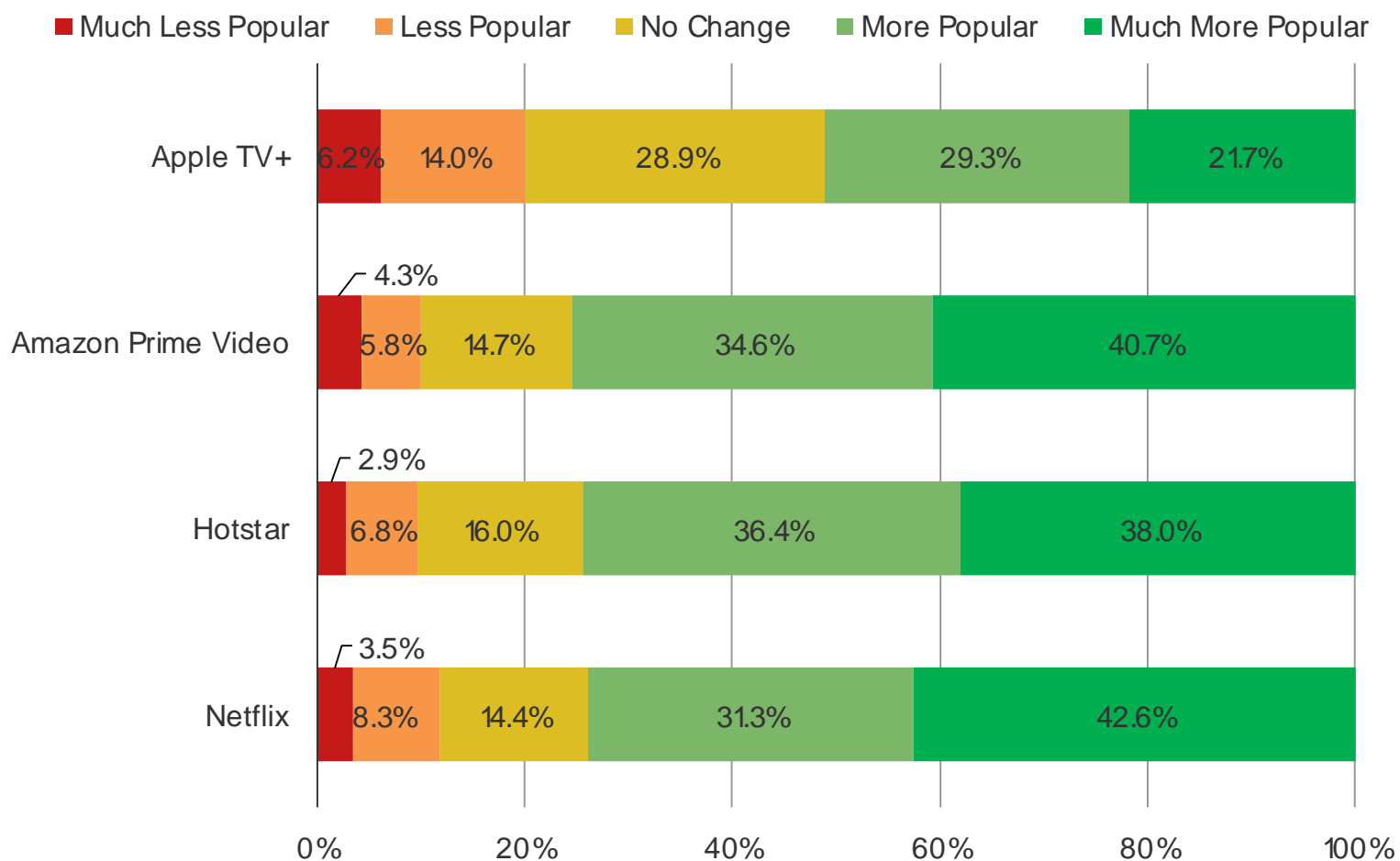
Posed to all respondents



## Netflix India

ARE THE FOLLOWING GETTING MORE OR LESS POPULAR IN INDIA?

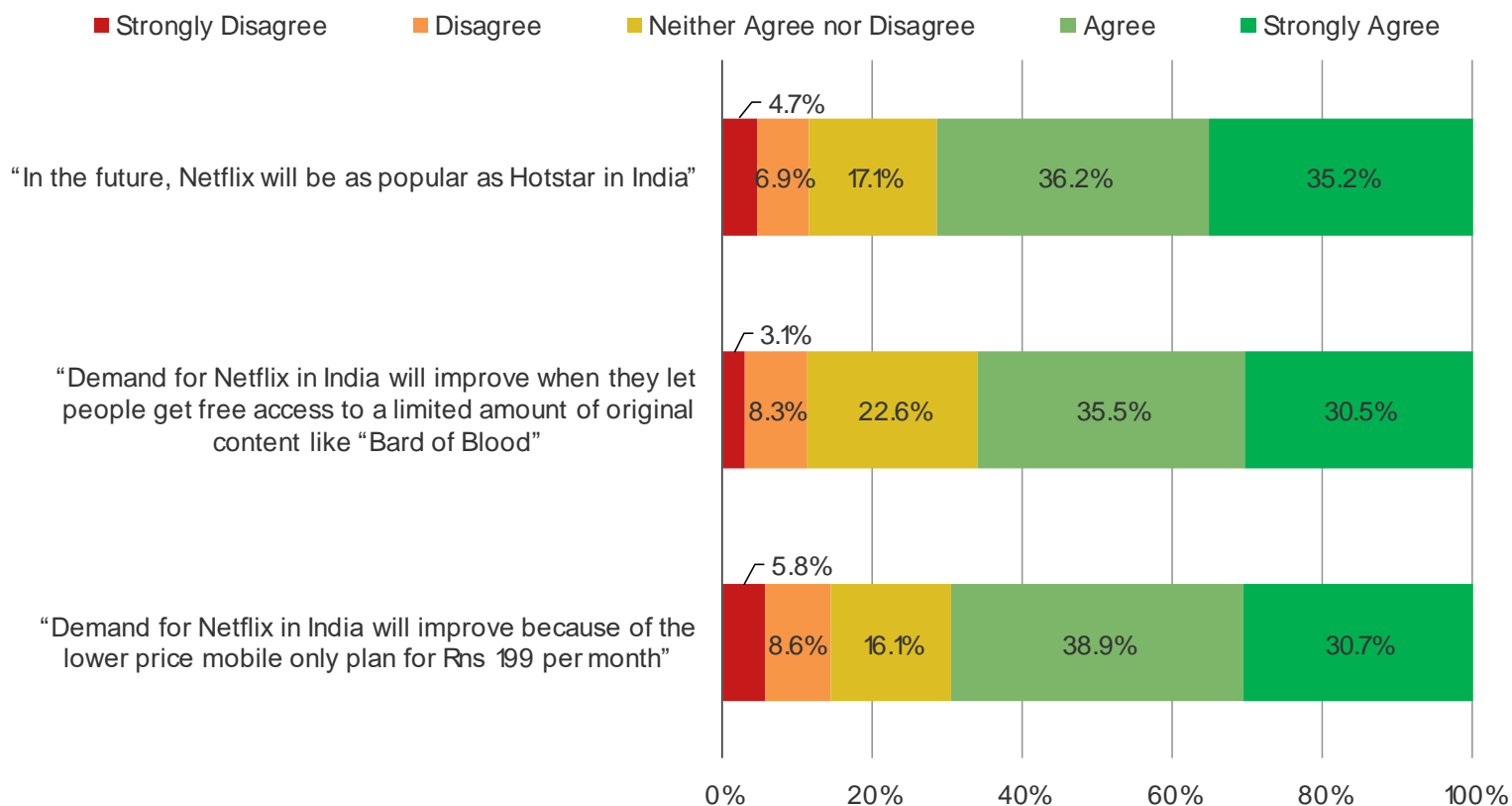
Posed to all respondents



## Netflix India

TO WHAT EXTENT DO YOU AGREE WITH THE FOLLOWING STATEMENT:

Posed to all respondents





IF YOU HAD TO USE ONE WORD TO DESCRIBE EACH OF THE FOLLOWING, WHAT WOULD IT BE?

HOTSTAR



APPLE TV+



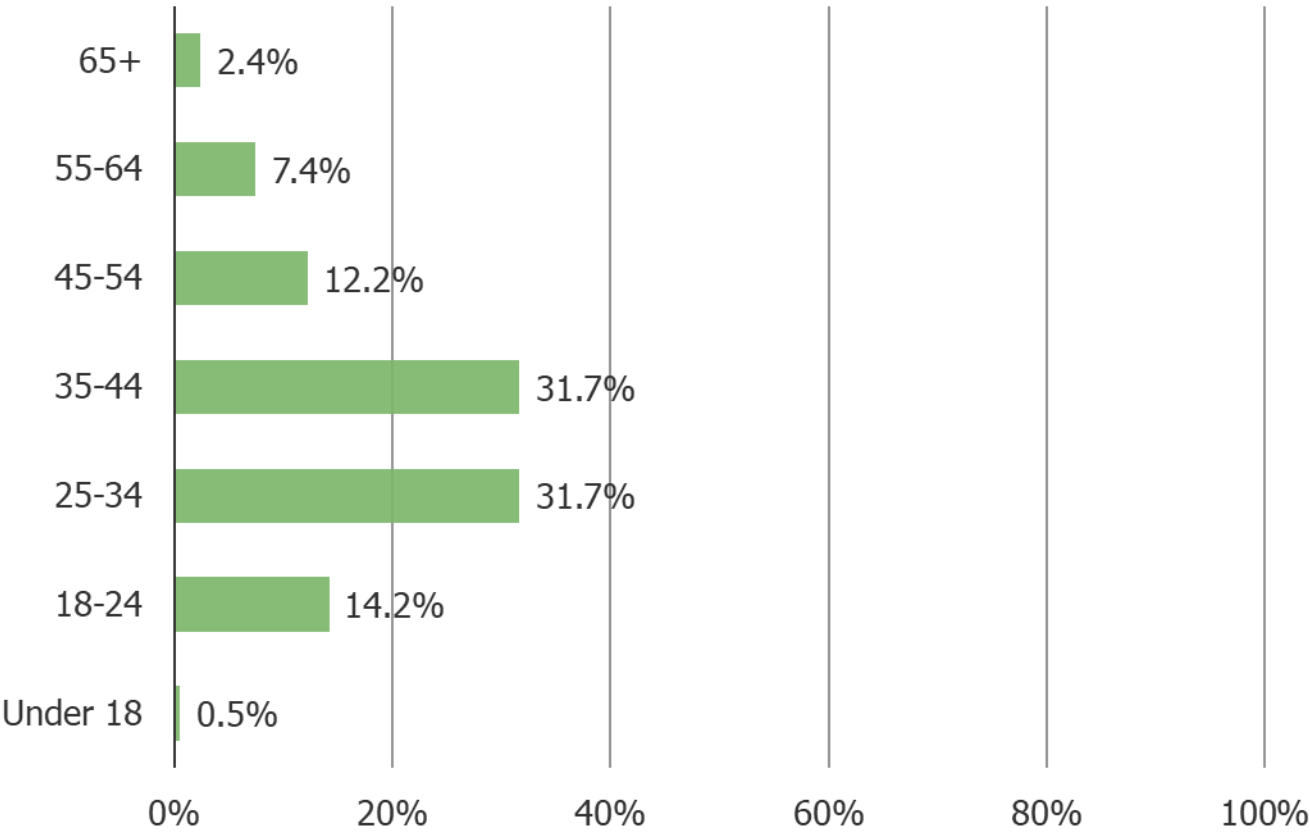
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DEMOGRAPHICS

Netflix India

AGE

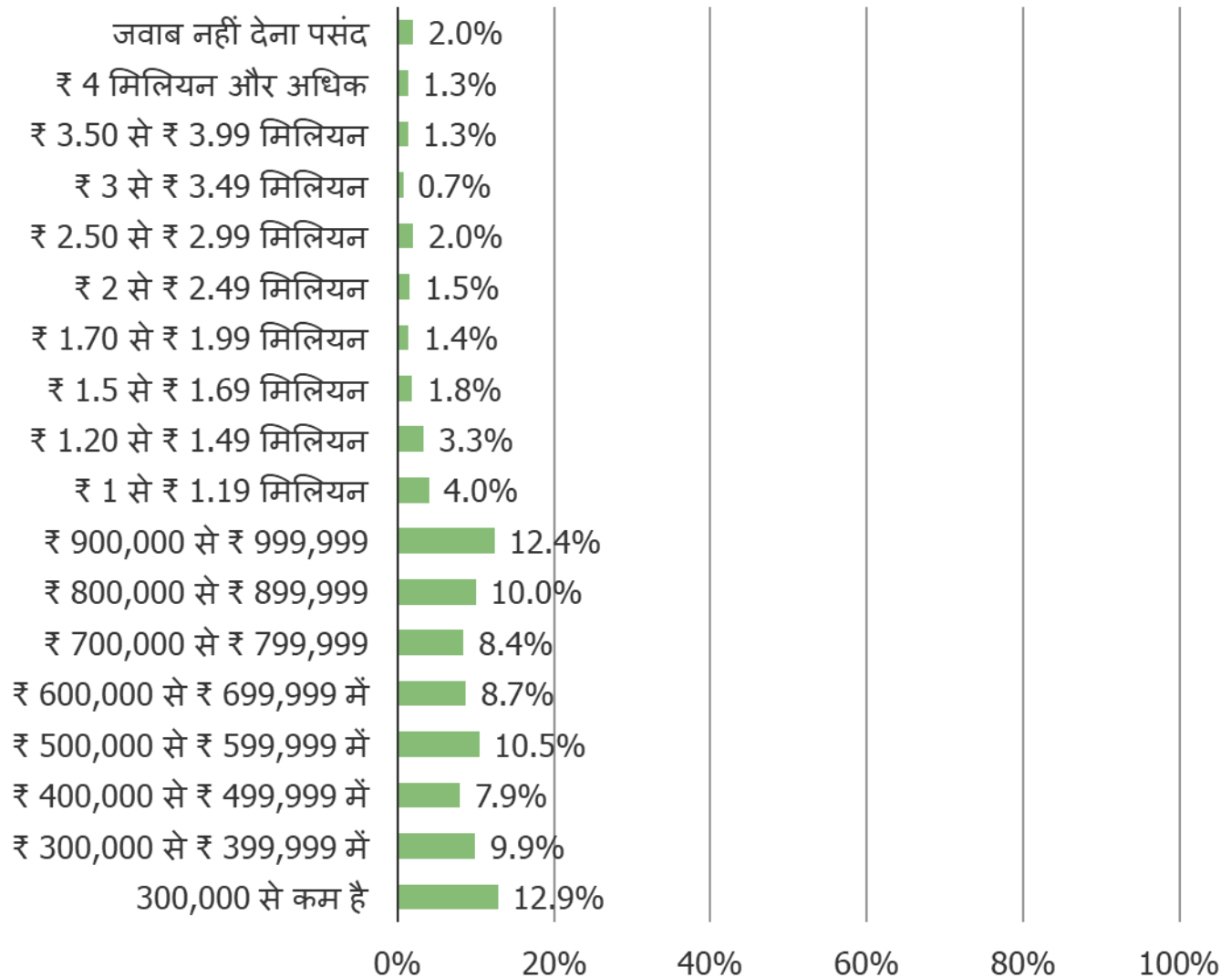
Posed to all respondents



## Netflix India

## INCOME

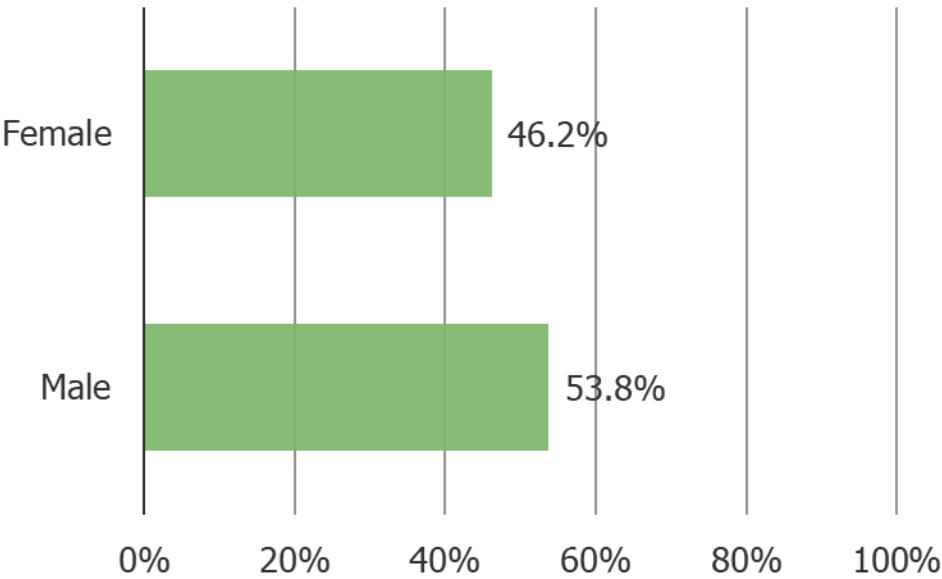
Posed to all respondents



Netflix India

GENDER

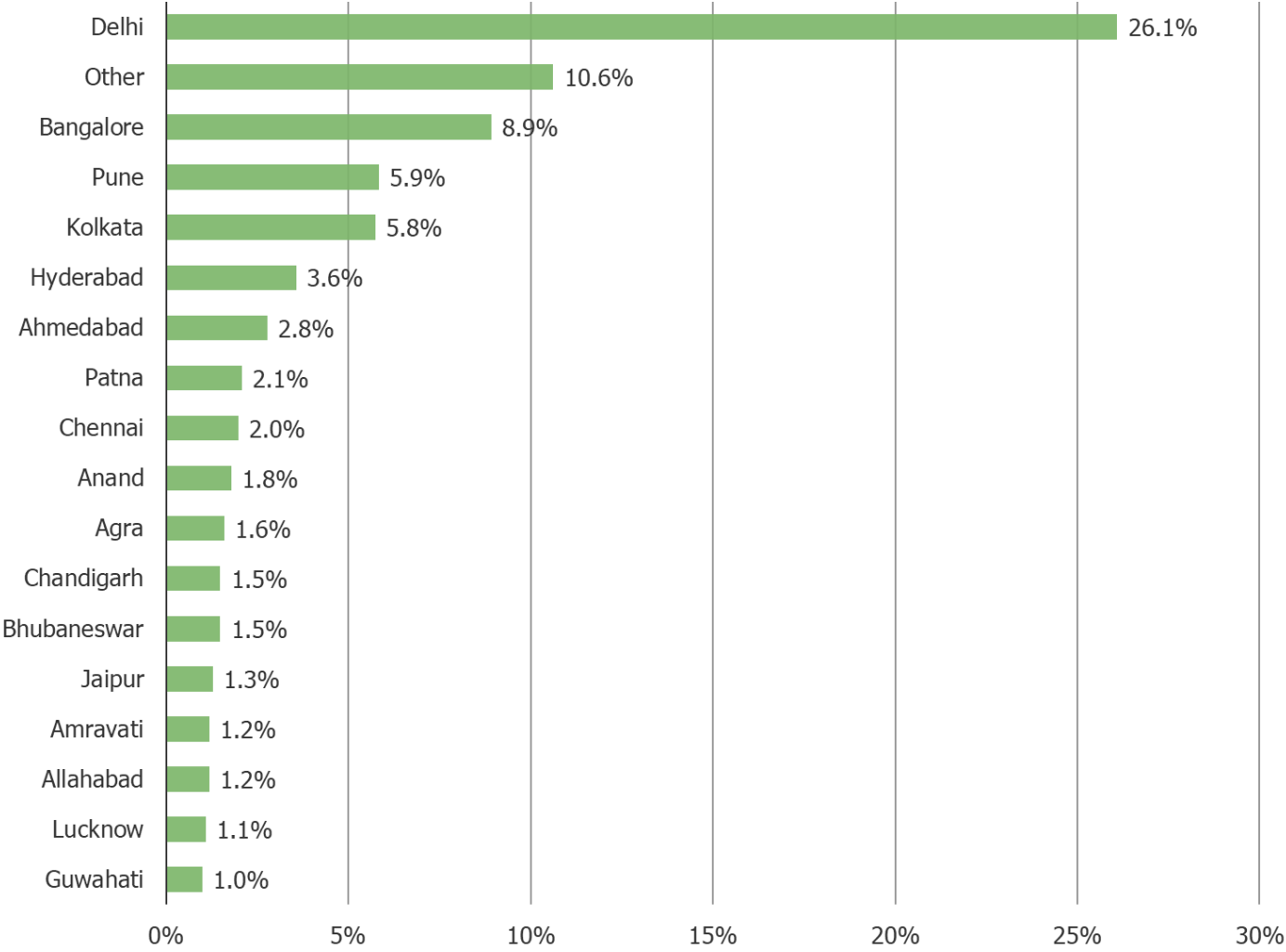
Posed to all respondents



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LOCATION

Posed to all respondents



Readings over 1% shown in chart above.