



# J.D. POWER



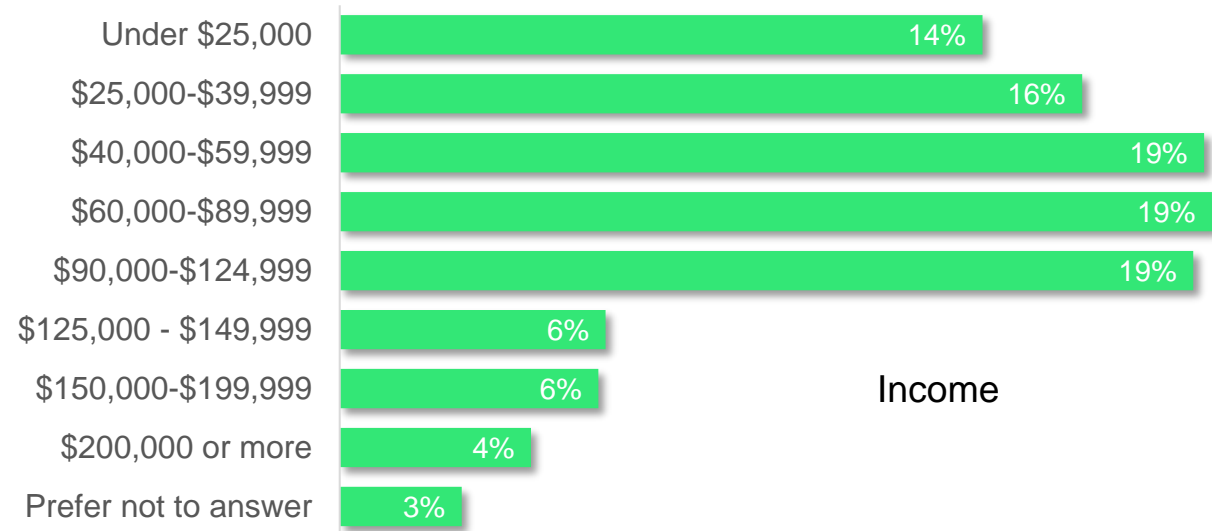
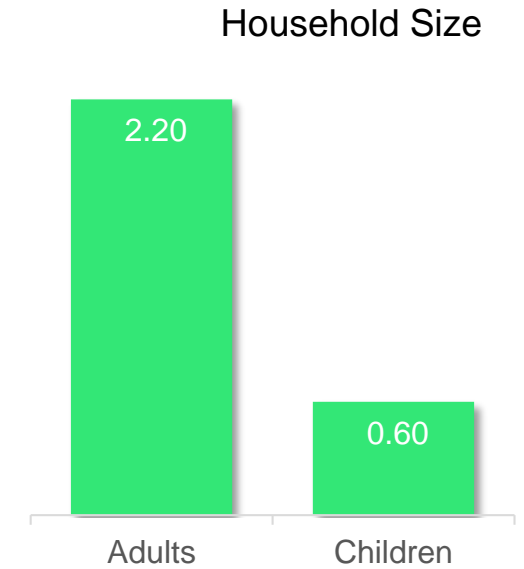
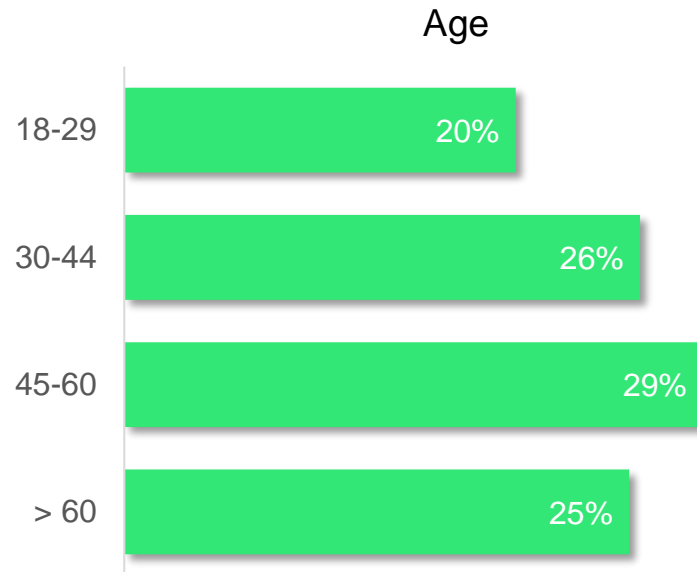
## **Streaming Provider Experiences During COVID-19 Pulse Survey**

TMT Global Business Intelligence

May 4, 2020

# Pulse Survey Methodology

Fielded April 24-26, 2020  
1,232 surveys completed



Some percentages add up to 101% due to rounding

# Netflix has the highest penetration of any streaming service

# NETFLIX

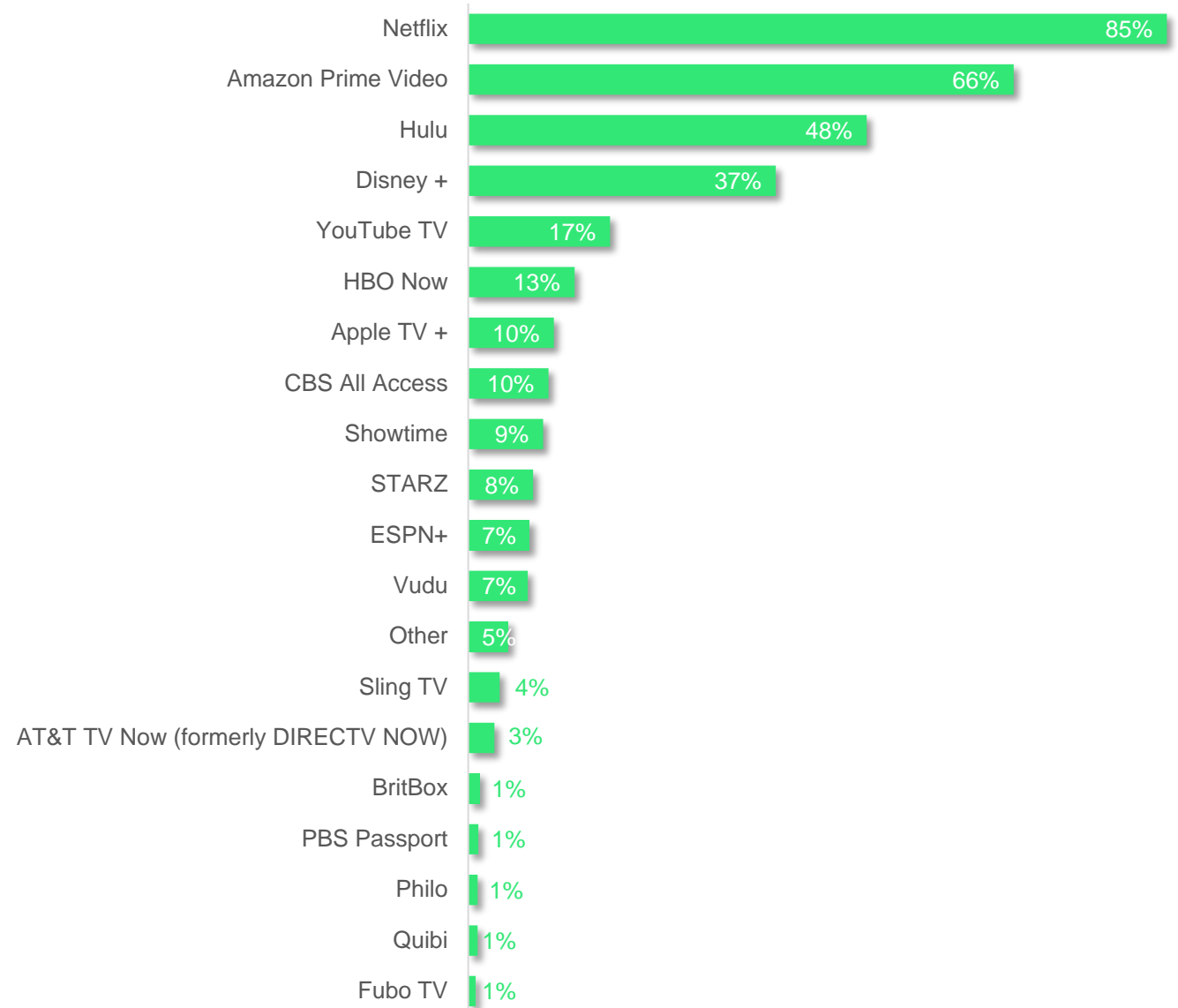
Amazon Prime Video and Hulu are also widely used streaming services



Upstart Disney+ has had a strong launch, acquiring the 4<sup>th</sup> highest market share in its five months of operation (launched in U.S. on Nov. 12, 2019).



## Which streaming services do you subscribe to or have access to?

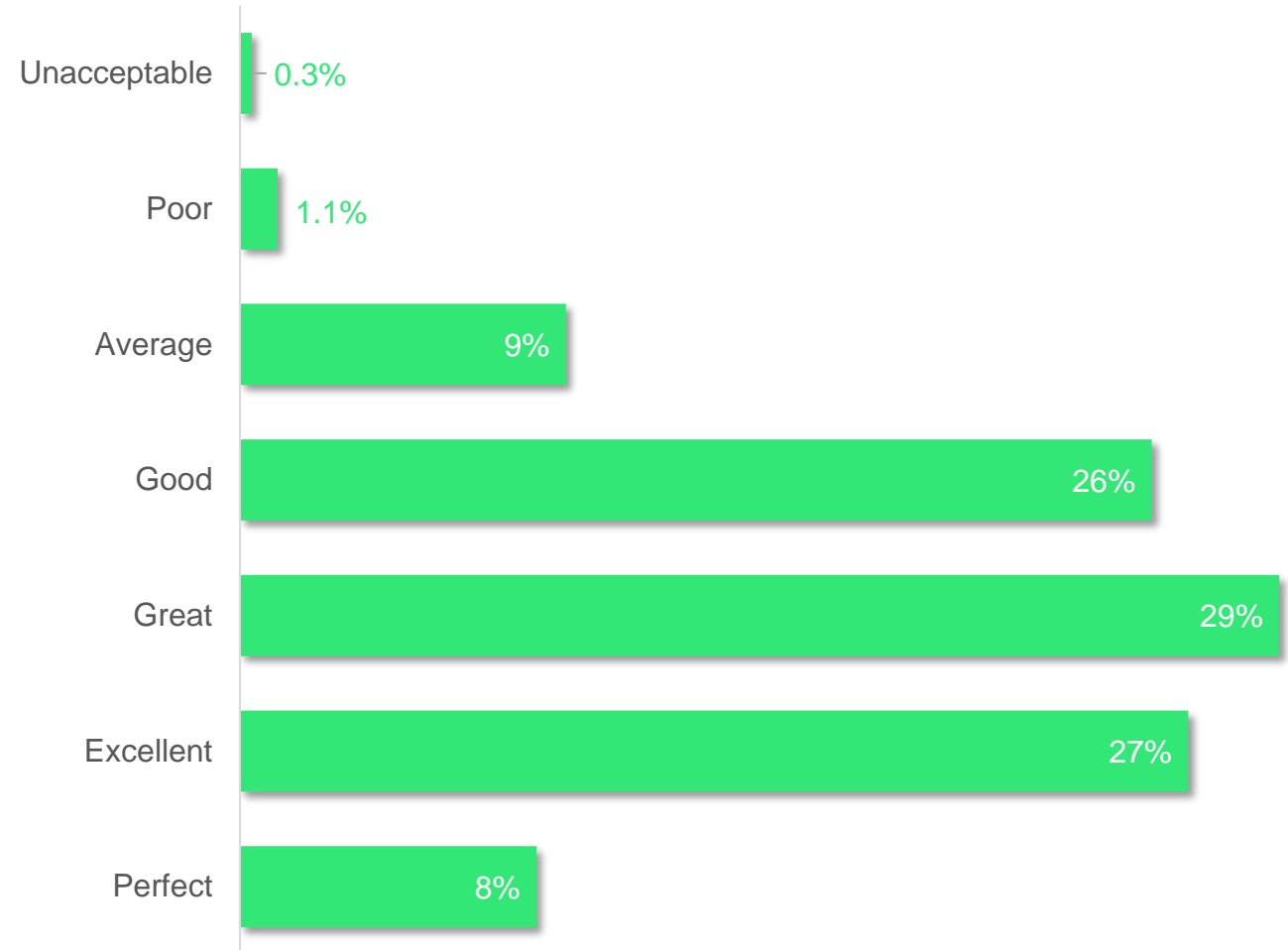


# 35% rate Streaming Providers as Excellent or Perfect

Only 1.4% rate Streaming Providers as Poor or Unacceptable

Most respondents (55%) rate Streaming Providers as Good or Great.

Overall, how would you rate your streaming service provider?



# Streaming *audio and video quality* rates highest

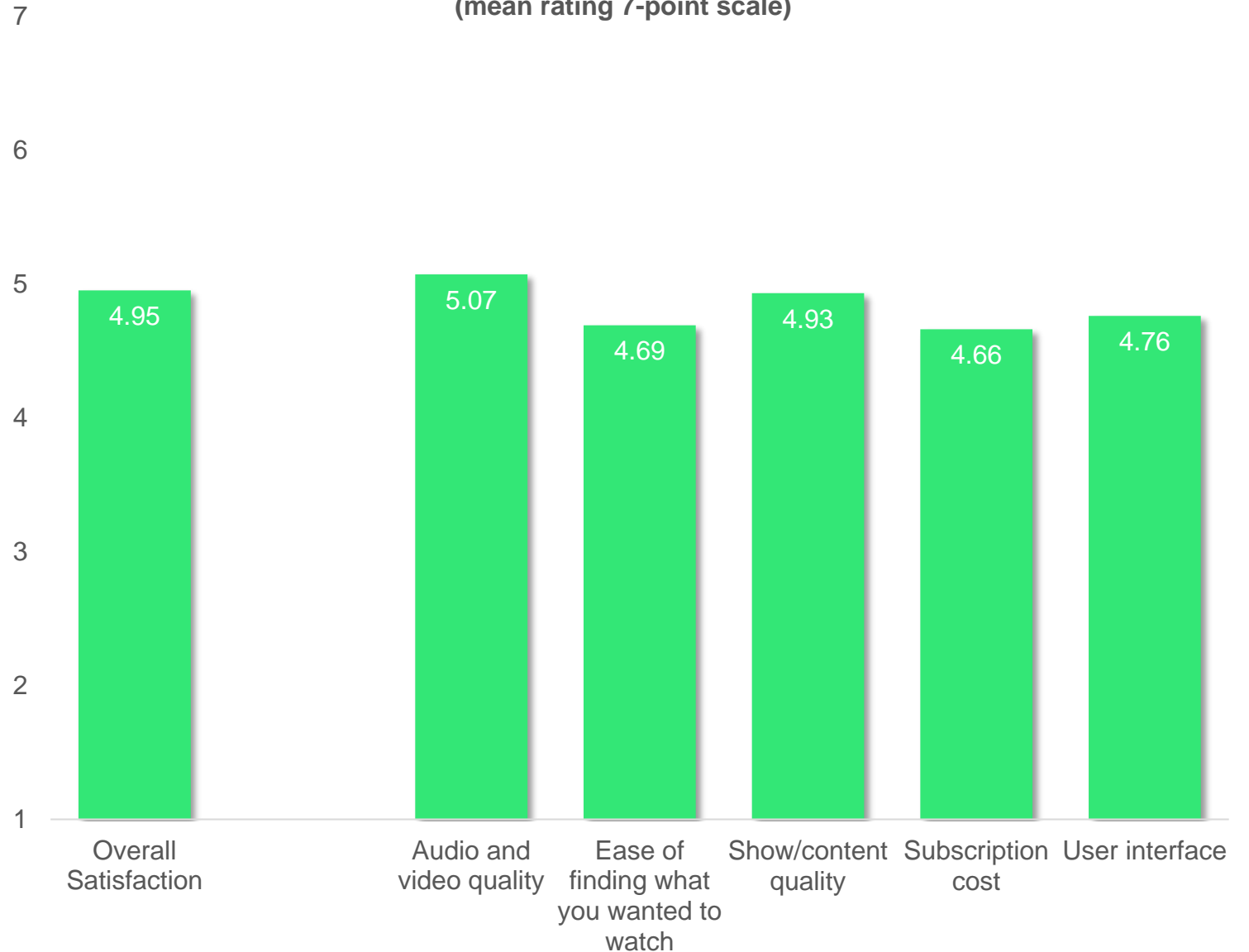
## *Show/content quality* also rates high from streaming customers

Respondents were asked to rate up to three of their streaming providers on five attributes and on their overall satisfaction with them as a provider of services.

*Subscription cost* and *Ease of finding what you wanted to watch* are the lowest rated attributes.

- Rating Scale**
- 1. Unacceptable
  - 2. Poor
  - 3. Average
  - 4. Good
  - 5. Great
  - 6. Excellent
  - 7. Perfect

How would you rate your Streaming Provider  
(mean rating 7-point scale)



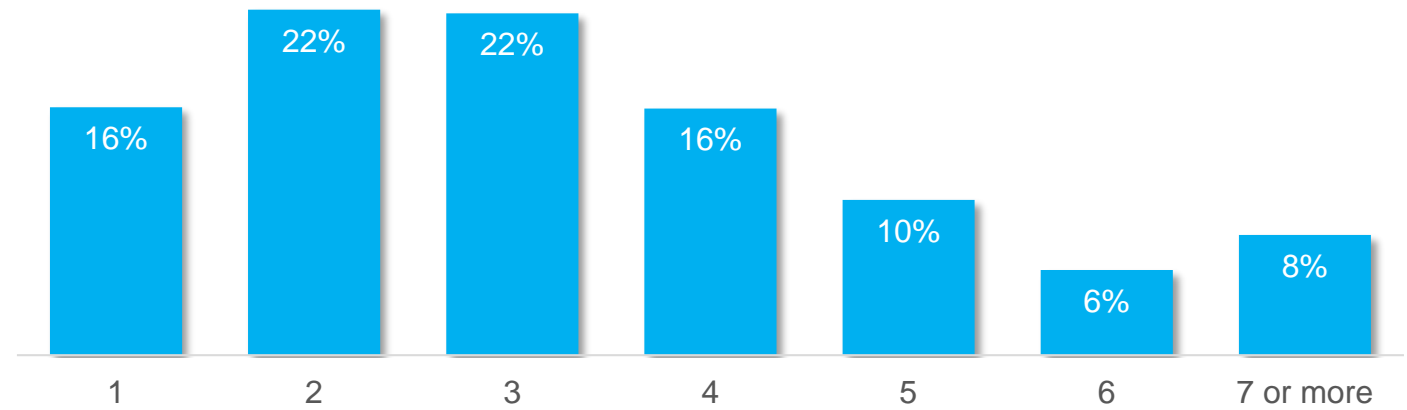
# The typical household subscribes to 3.4 streaming services

38% of households use 1 or 2 streaming providers

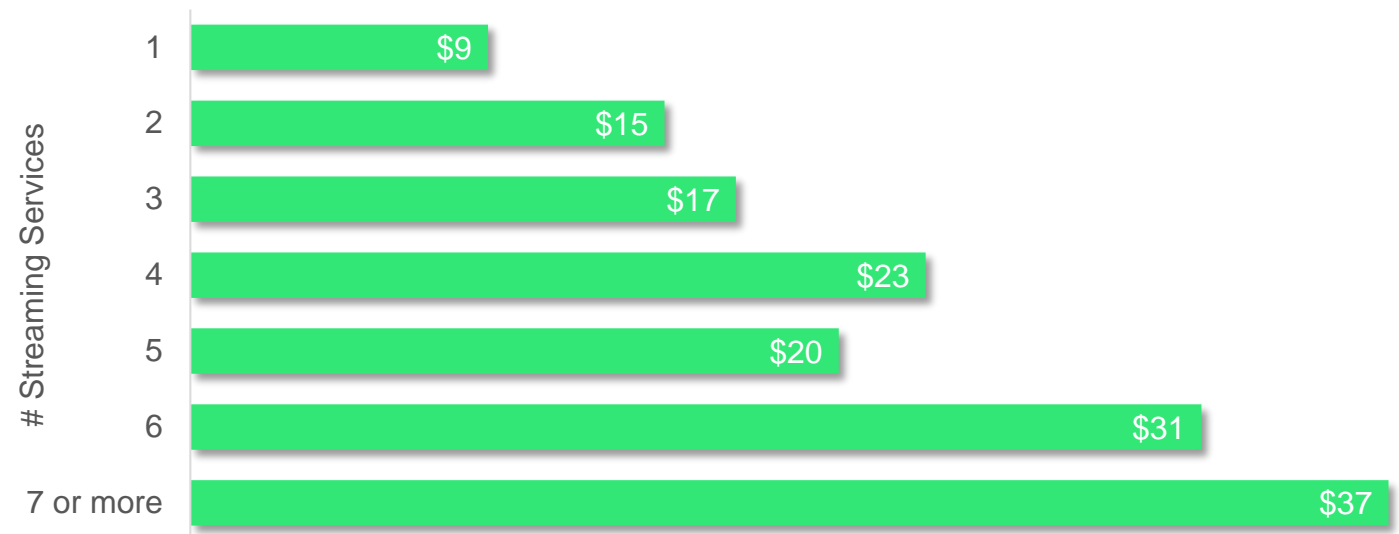
24% of households subscribe to 5 or more streaming providers

Consumers estimate they pay about \$5.50 per streaming service per month, across all mixes of streaming subscriptions (including those that currently get the subscription at no cost)

### # of Streaming Services you Use



### How much per month are you paying for all your streaming services combined?

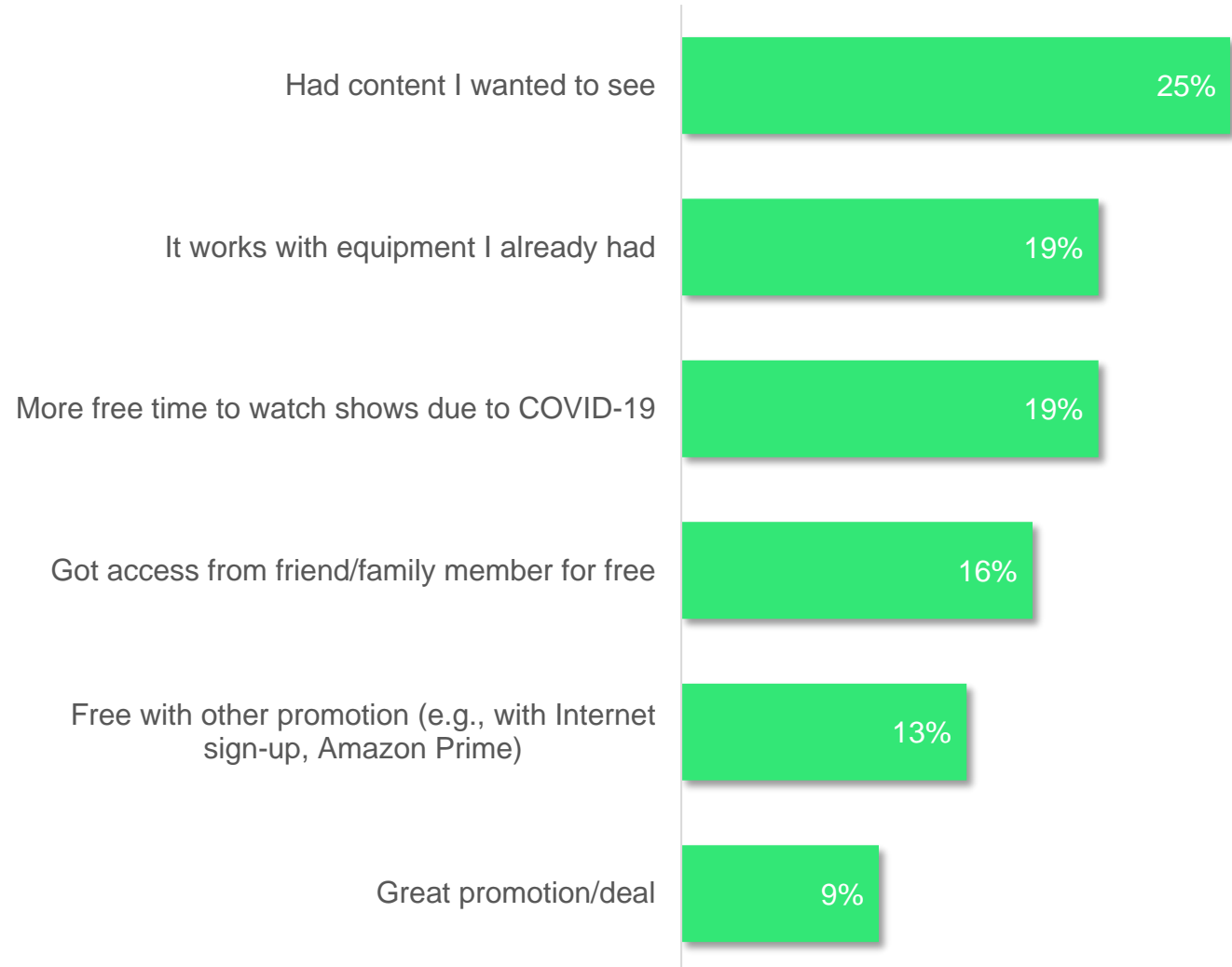


# People subscribe to see content they want

## Free family access oddly rates low on cost attribute

Many customers joined recently (20%) because they now have more free time due to COVID-19

## Why did you choose to subscribe? (joined within past 6 months)



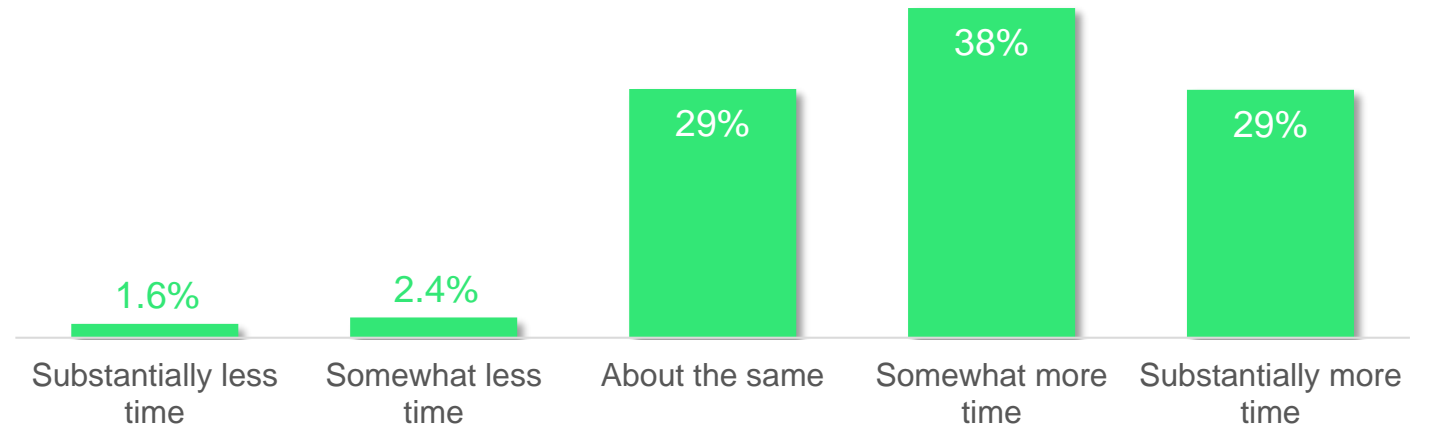
# We are streaming longer than before

**Two-thirds (67%) say they are spending more time streaming**

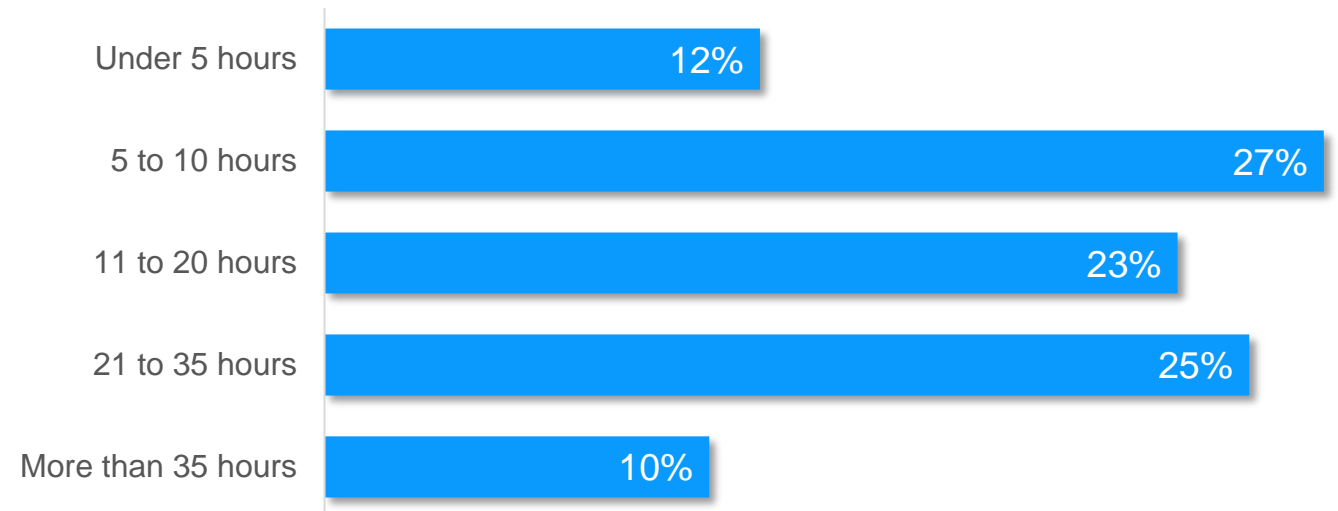
The average viewer spent 18 hours streaming in the past 7 days, or about 2.5 hours per day.

10% of viewers streamed more than 5 hours per day.

### How much time do you spend streaming now compared to before COVID-19?



### In the past 7 days, how much time have you spent streaming?



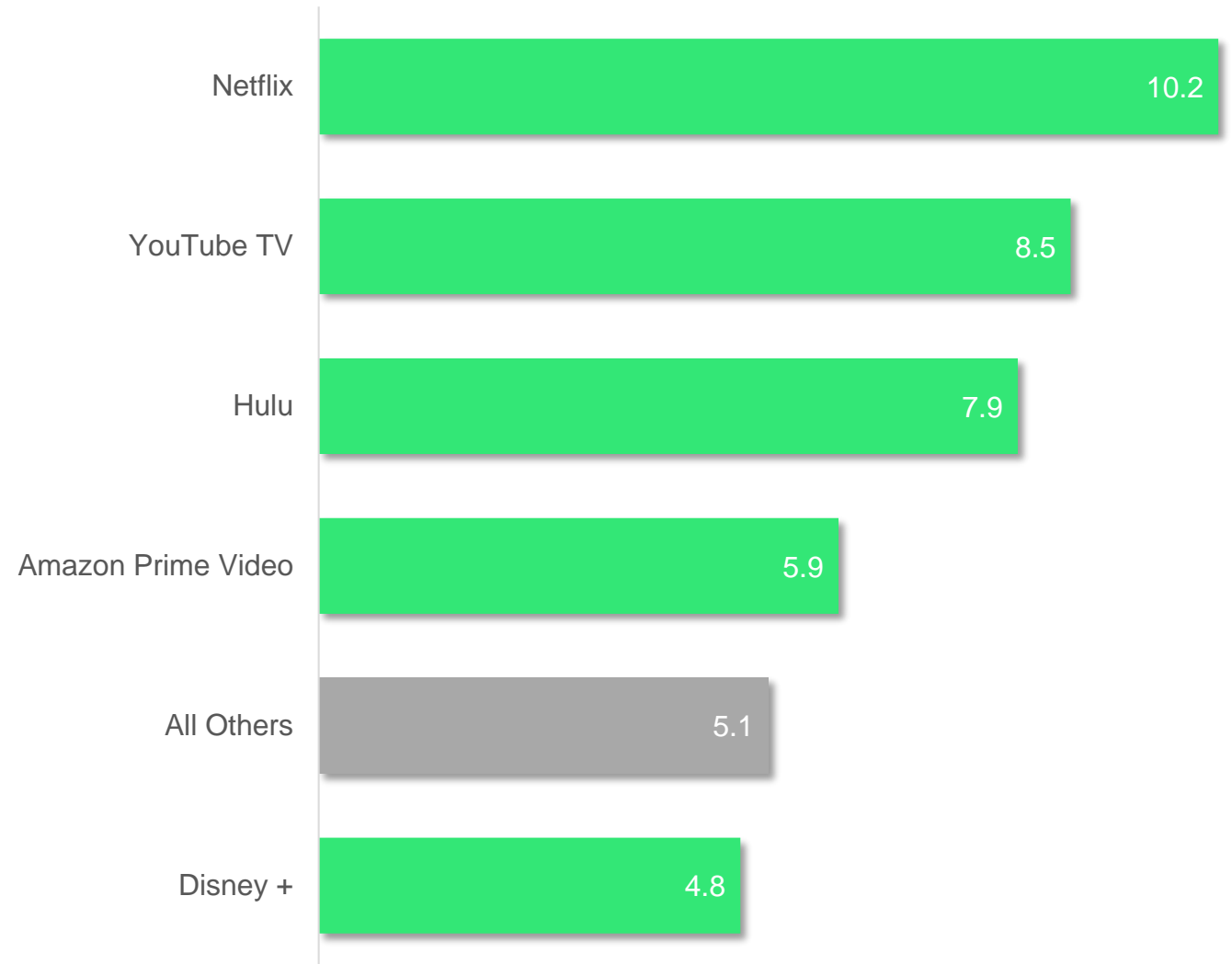


# Netflix viewers stream longest hours

**YouTube TV and Hulu viewers also streamed more than one hour per day**

Disney+ viewership commanded less than one-half the hours compared to Netflix

In the past 7 days, how much time have you spent watching content on ... ?

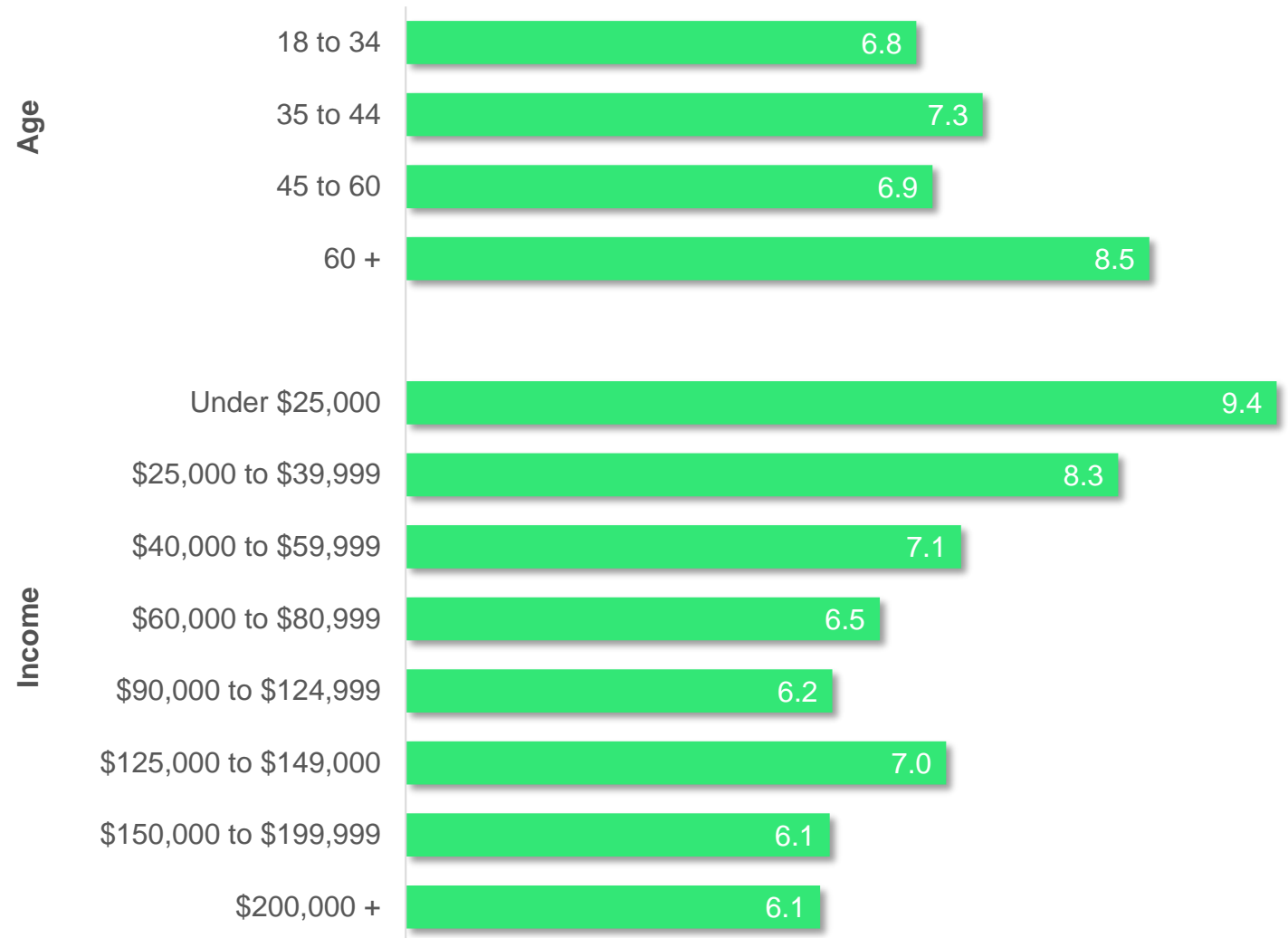


Among streaming providers with 100 or more completed surveys

# Lower income households stream longer hours

Older views (60+) spend more time streaming

In the past 7 days, how much time have you spent watching?  
(by Age / Income)

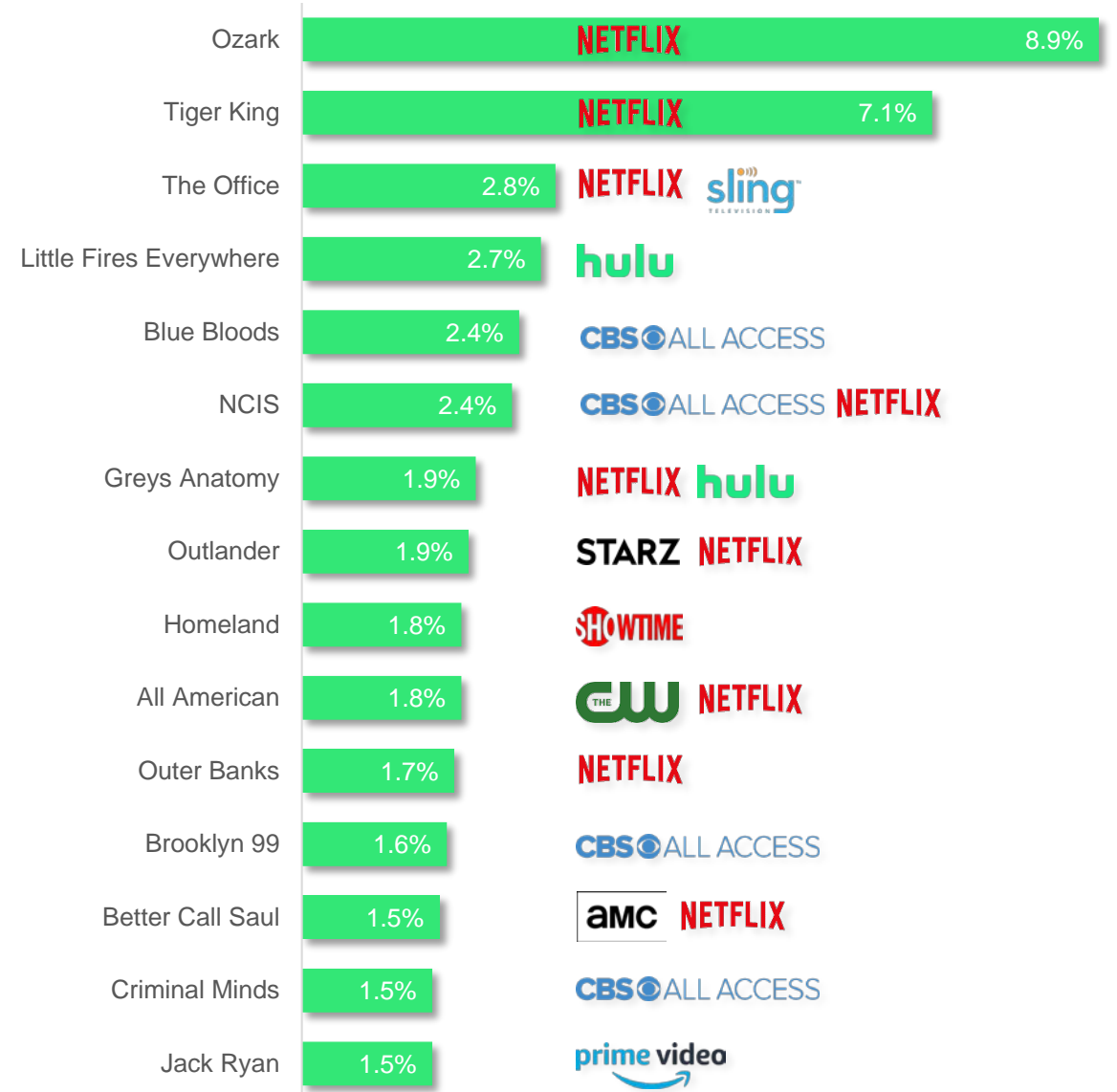


# Ozark and Tiger King are the most-watched shows this month

Streaming of syndicated shows such as *The Office*, *Blue Bloods*, *NCIS* and *Greys Anatomy* has also been popular

*Ozark* (6%), *Tiger King* (3.1%), and *Little Fires Everywhere* (1.5%) were the most recommended shows; however, the top 15 most-recommended shows represent less than one-quarter (23%) of all shows recommended – there is a lot of content out there right now that people love.

## What content have you watched most recently? Please write in your top 3 shows in the last month

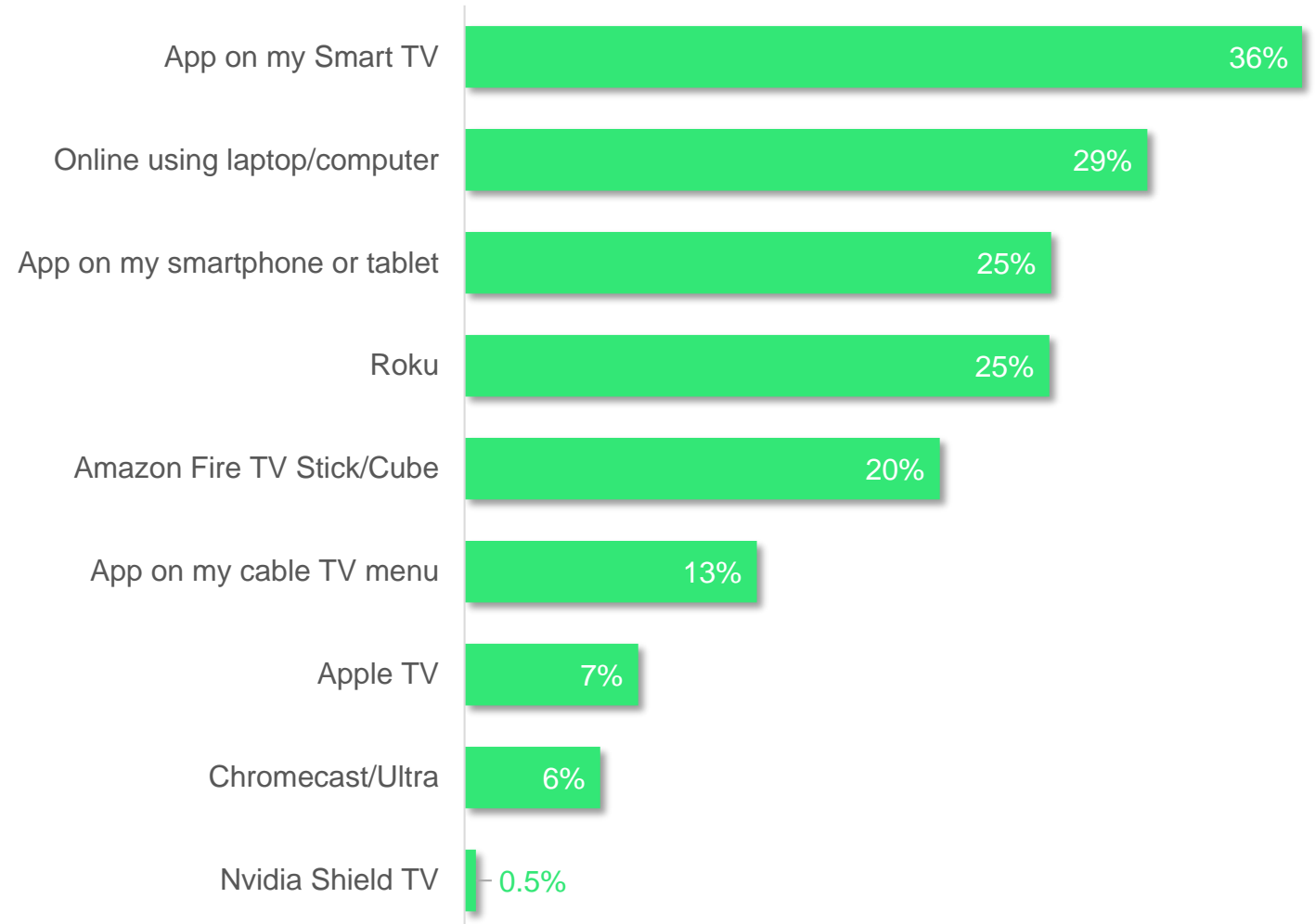


# Smart TV Apps are the most common way to stream

Streaming online using laptop/computer also is common

One-quarter of respondents (25%) connect to streaming using an App on their smartphone or tablet

How do you normally connect to your streaming services?  
(mark all that apply)

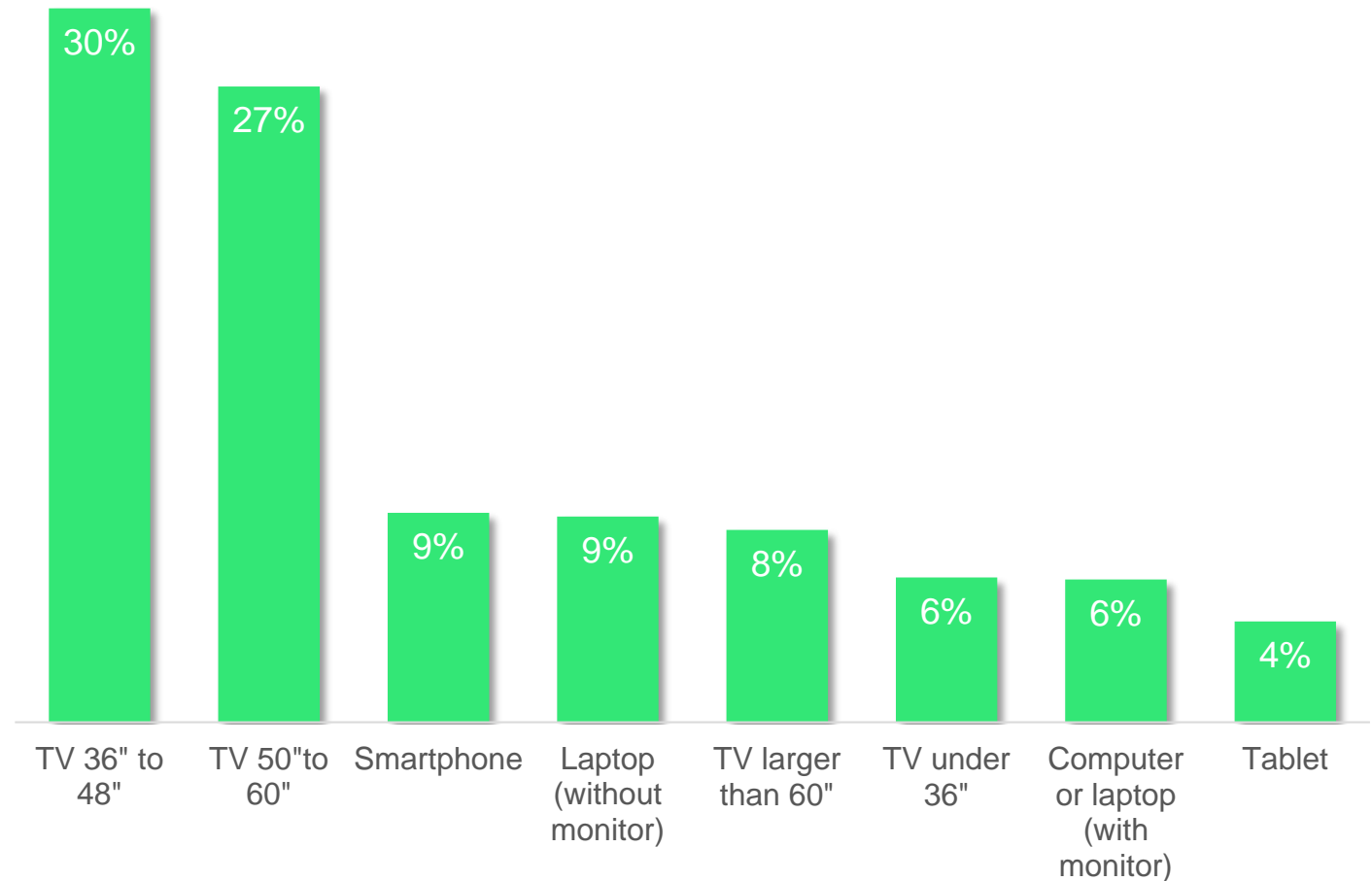


# Most households (35%) stream to large TV screens (50"+)

Streaming to laptops or computers makes up 14% of screen viewing

Streaming to smartphones or tablets makes up 13% of screen viewing

What screen do you most frequently stream to?

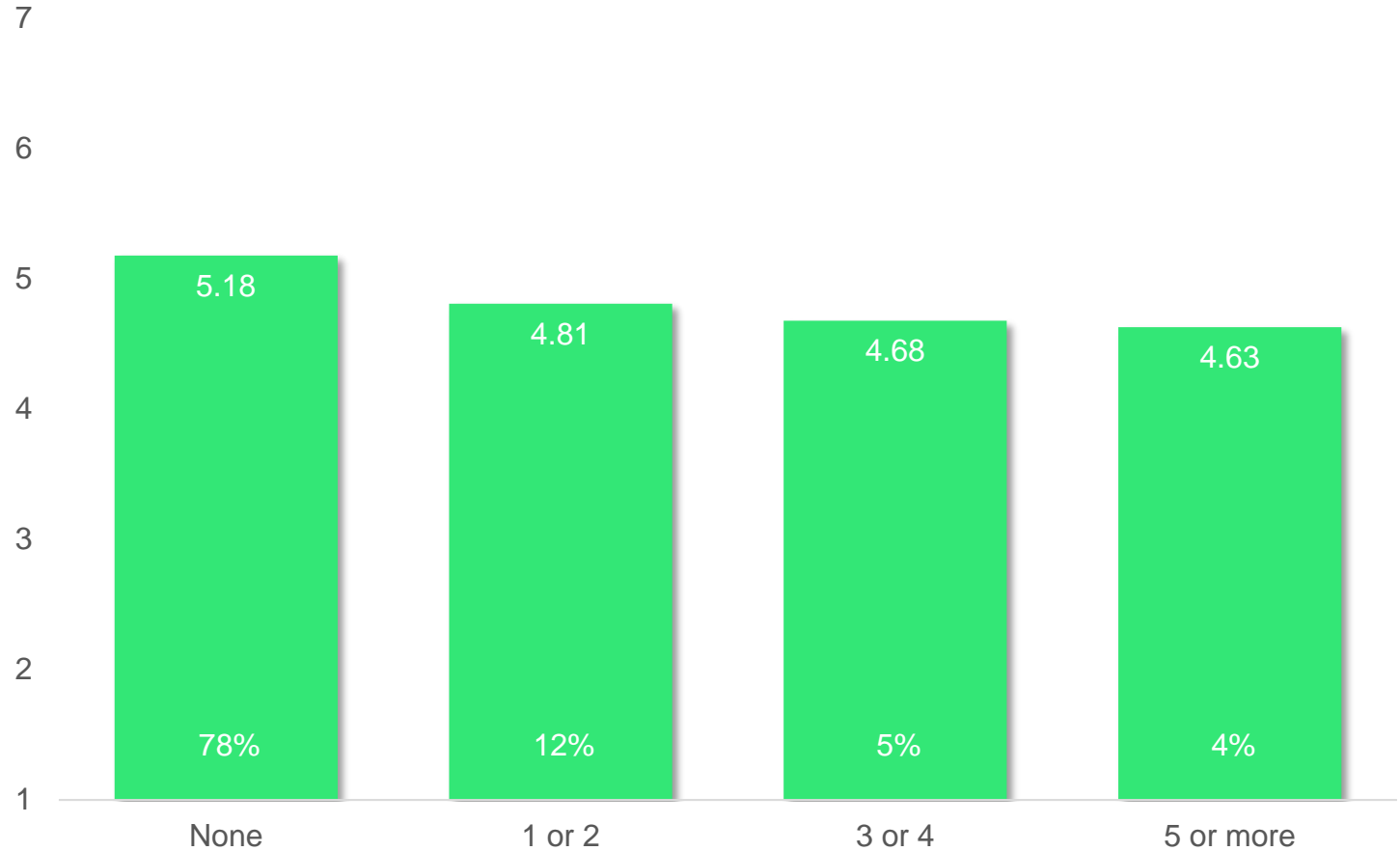


# Most people (78%) have had no quality problems streaming

However, experiencing even one problem degrades the experience substantially

- Rating Scale**
- 1. Unacceptable
  - 2. Poor
  - 3. Average
  - 4. Good
  - 5. Great
  - 6. Excellent
  - 7. Perfect

How would you rate Audio and Video Quality?  
(mean rating 7-point scale)



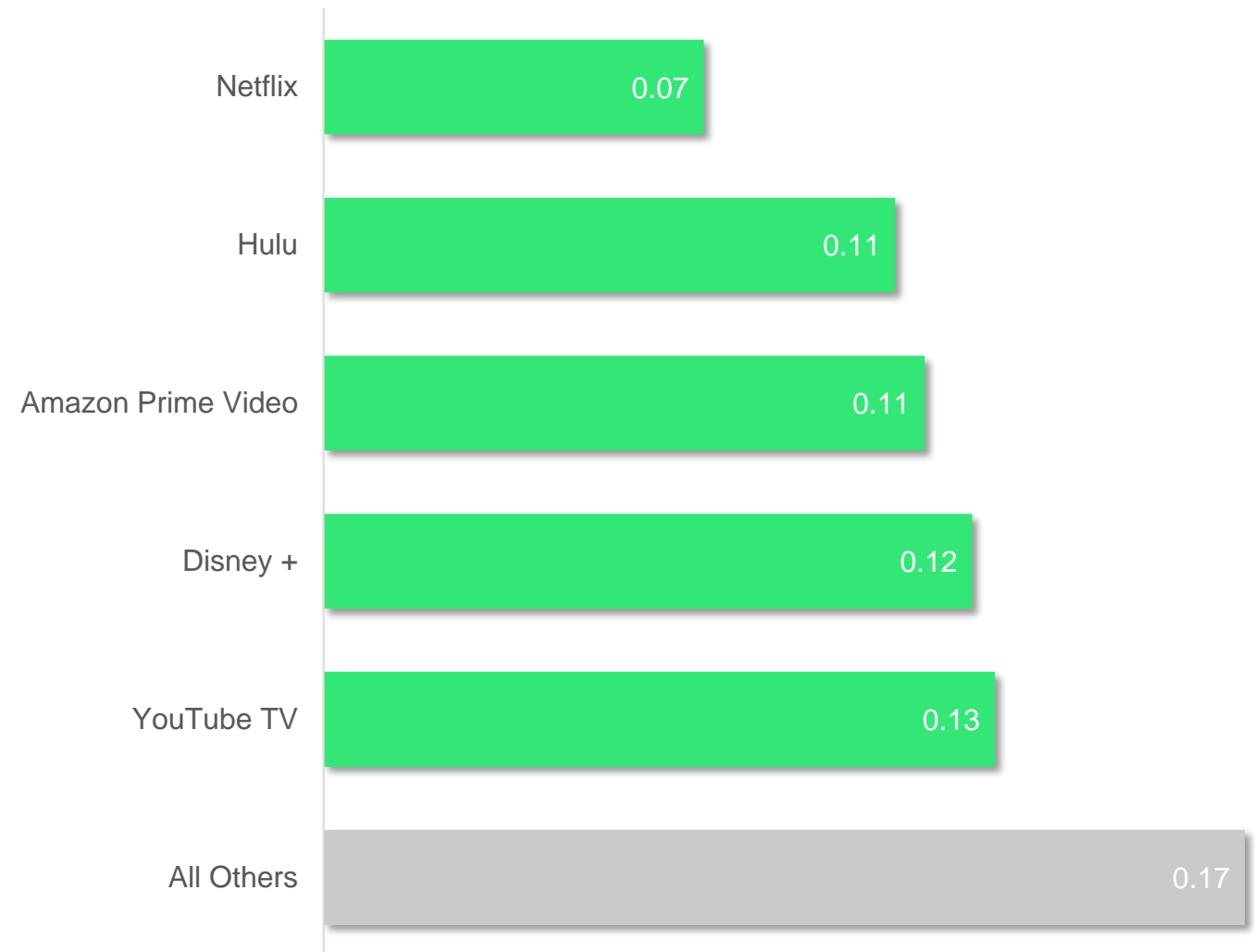
How many problems have you had streaming content in the last 7 days?

# Netflix provides the most trouble-free streaming

Based on the total number of problems experience in the past 7 days and the total number of hours watched in the past 7 days

Streaming providers outside of the big 5 have more of a challenge delivering trouble-free streaming

### Streaming problems per hour watched



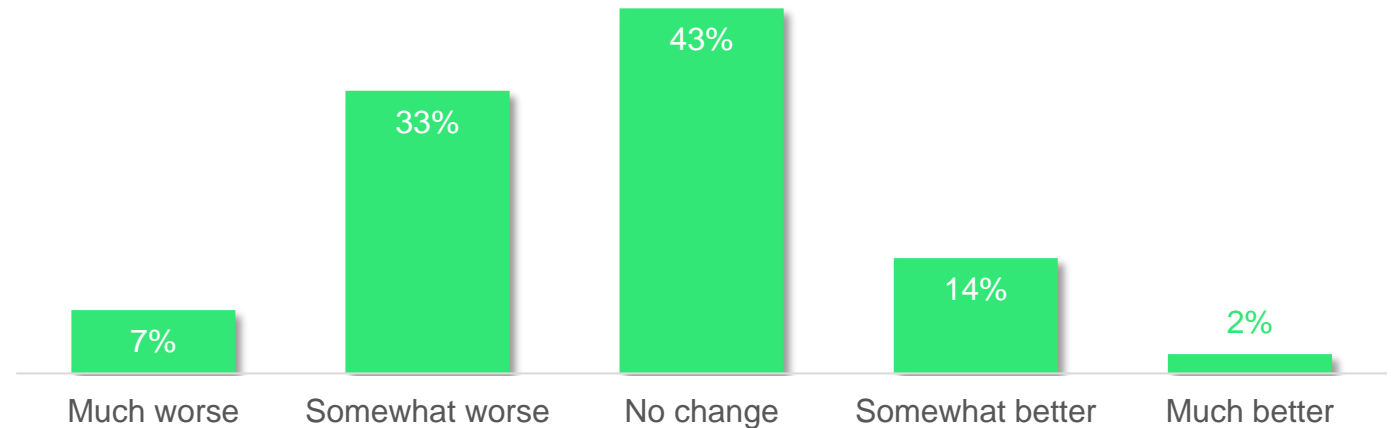
Among streaming providers with 100 or more completed surveys

# Despite financial woes, few consumers will drop Streaming Providers

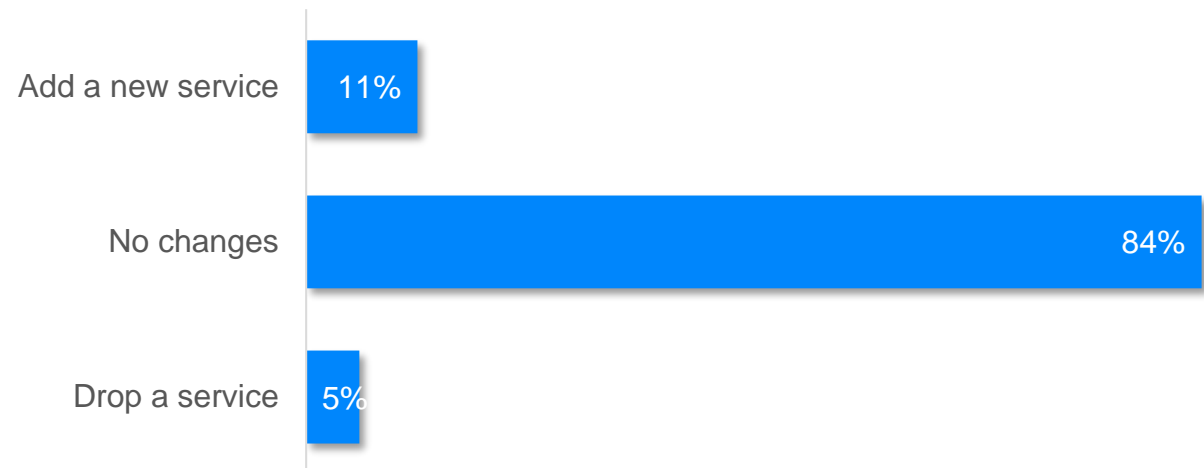
**4 out of 10 consumers expect their financial situation to be worse in two months**

However, very few customers (5%) expect to drop any of their streaming services in the next 30 days. In fact, while most customers do not expect to change anything (84%), more customers plan to add a new service (11%) than drop a service.

Compared to before COVID-19 started, do you expect your financial situation in two months to be...



Do you expect you will change the streaming services you subscribe to in the next 30 days?

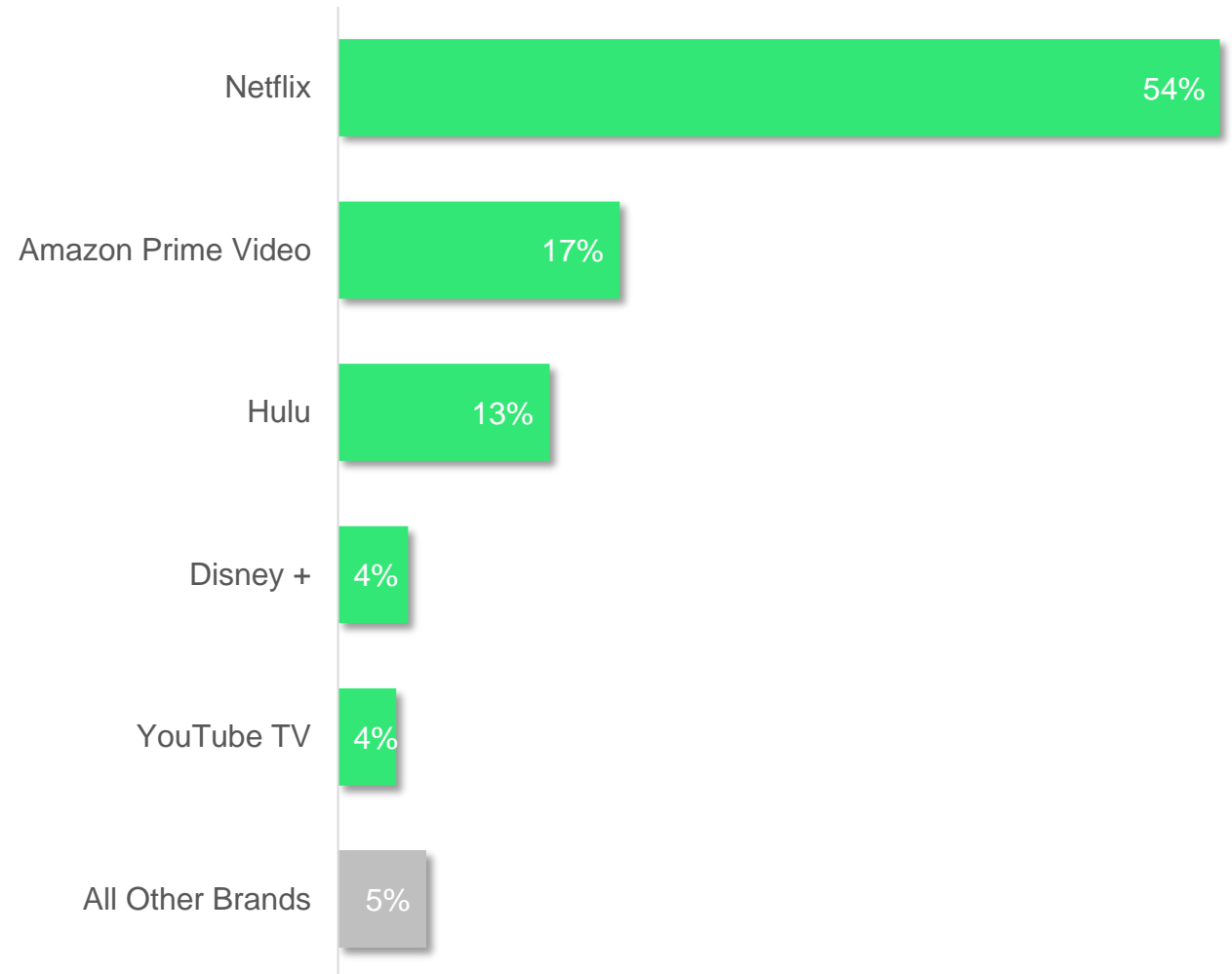




# Netflix is the one brand above all

More customers would choose Netflix than all the other brands combined

If you were only able to use one streaming service, which would you choose?





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We've been trusted by consumers for more than 50 years to bring their voice to businesses around the world, leading to better products, services and experiences. Our cross-industry and multidisciplinary approach combines leading-edge tools and market expertise to uncover insights that increase understanding and drive business results.

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