

# MARKET DISRUPTION AHEAD FOR NEW STREAMING SERVICES

Any New SVOD Service(s)

NETFLIX

See what's  
WATCH ANYWHERE. CANCEL ANY

28%



DISNEY+ WILL LEAD THE PACK AMONG NEW SERVICES:  
1 IN 5 HOUSEHOLDS INTEND TO SIGN UP

21%



11%



10%

Responses from all households: what's the likelihood of signing up for Disney+, HBO Max, or NBC (Top 2 Box)?

## NEW ENTRANTS WILL REDRAW THE OTT LANDSCAPE

DISNEY+ TOPS PREFERENCES FOR SVOD LEADERS, AS DISNEY-HULU BUNDLE\* MORE ATTRACTIVE  
HBO MAX GETS MOST INTEREST FROM CURRENT HBO SUBSCRIBERS

Current SVOD Streamers



HBO NOW

HBO GO

SHOWTIME

STARZ

hulu

amazon prime video

NETFLIX

38%

30%

22%

37%

29%

22%

38%

27%

21%

33%

23%

17%

32%

15%

12%

27%

11%

10%

27%

13%

11%

\*Disney+ Bundle will include Disney+, Hulu Basic, and ESPN+ for \$12.99/month, the first streaming bundle of its kind  
Responses from streamers currently subscribing to services (on the left): what's the likelihood of signing up for Disney+, HBO Max, or NBC?

## CONTENT CONTINUES TO BE KING!

CONTENT, NOT COST, WILL DRIVE ADOPTION - ESPECIALLY DISNEY'S EXTENSIVE MOVIE LIBRARY.  
ORIGINAL CONTENT FOR HBO MAX AND TV SERIES FOR NBC ALSO SPARKING INTEREST

Convenience  
Ability to cancel other streaming services  
Library of television series  
Cost of the service  
Original content  
Library of movies

10%

12%

16%

11%

12%

12%

9%

12%

21%

19%

16%

17%

18%

23%

18%

34%

25%

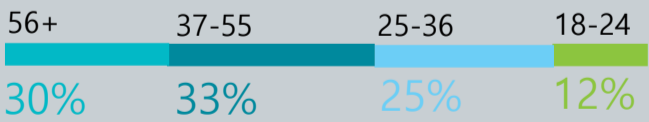
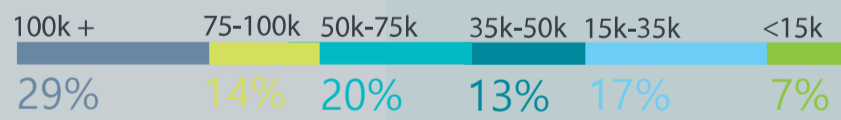
17%

Responses from households excited for the service: what are you excited about with the launch of the new streaming service?

## NEW SERVICES WILL HAVE BROADER APPEAL

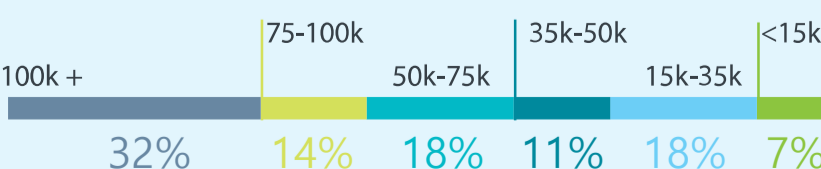
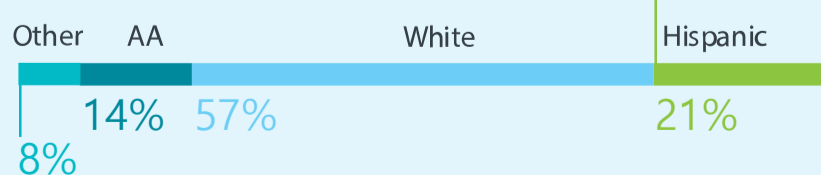
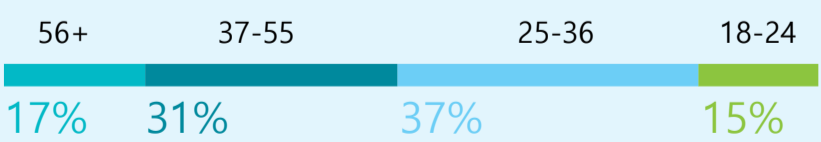
THE NEW ENTRANTS WILL ATTRACT DEMOGRAPHICS THAT ARE LESS LIKELY TO BE SIMILAR TO TODAY'S SVOD SUBSCRIBERS, ESPECIALLY WITHIN MINORITIES AND OLDER MILLENNIAL HOUSEHOLDS

### CURRENT STREAMERS TEND TO REPRESENT NATIONAL HOUSEHOLDS

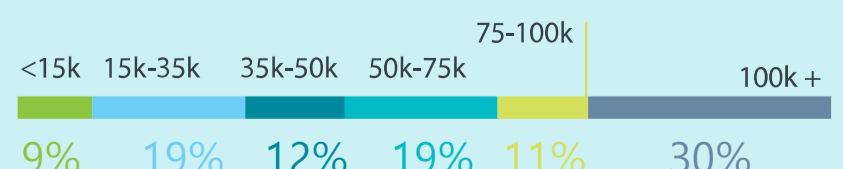
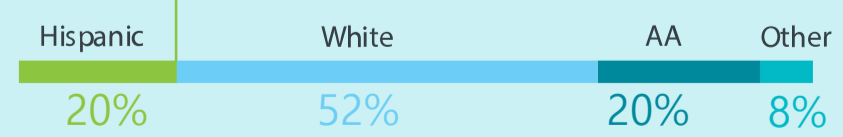
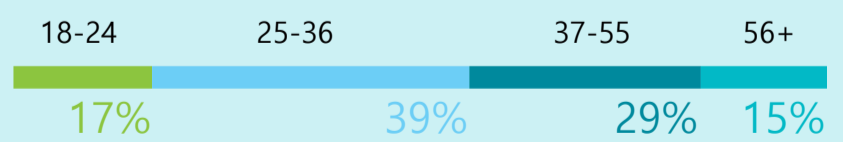


Responses from households who currently use an SVOD Service

### Those Likely to Sign up for Disney+



### Those Likely to Sign up for HBO MAX



Responses from households likely to sign up for the service.