

Global Streaming Study 2025

Discover trends, market
dynamics, and commercial
levers to drive growth

SIMON 
KUCHER
Unlocking better growth

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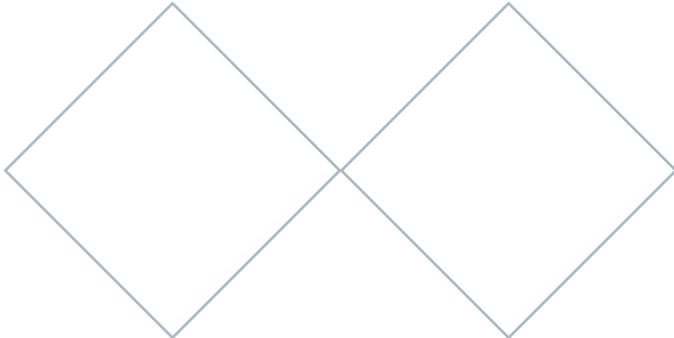
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1.

Executive summary

Global streaming study 2025: Summary of the key trends in streaming behavior

Streaming growth has stabilized globally

- Growth in consumption has stabilized to the same level as in 2024
- The proportion of users streaming “about the same” rose by **3p.p.**, signaling a **plateauing of growth** in mature markets
- **Europe** shows the slowest growth, while **India, Brazil, and the USA** are experiencing **strong gains** in streaming duration

Most streamers are true “content connoisseurs”

- **“Content Connoisseurs”** (36%) are the **largest viewer segment** (users who carefully select content based on preferences)
- **“Binge Watchers”** (30%) are also very prominent, especially in **Sweden, USA, and Brazil**
- **Country-specific** viewing behaviors:
 - **India and Singapore** lead in **“Mainstream Watching”**
 - **USA and Australia** have more **Background Watchers** (multitaskers)
 - **India** also ranks highest for **Social Watching**

Traditional TV is being replaced by streaming

- In **Spain, Singapore, and India**, over **70% of respondents** now see streaming as a **replacement for linear TV**
- The **relevance of traditional television is declining** globally, with increasing alignment across diverse regions
- Although **streaming services** are **increasingly replacing traditional TV** for individual **streaming users**, linear **television** continues to play a **meaningful role** at a **societal level**

Shift towards paid streaming models

- **Paid subscriptions** usage keeps growing since 2023, while **free streaming service** usage continues its **multi-year decline**, albeit at a slower pace
- **Average number of paid subscriptions** globally has increased from **2.8** (2024) to **3.0** (2025):
 - **India** leads with **4.4 subscriptions**, followed by **USA** (3.8) and **Brazil** (3.7).
 - **Singapore** and **Sweden** are the only countries where this **number remained stagnant or declined**

Increased willingness to pay for streaming

- Consumers' **monthly streaming budgets** have increased **by 20% on average**
 - **Germany, Brazil, and Japan** show the strongest increase (~30%)
 - **UK, USA, and Australia** display more conservative growth in spending

These insights underscore a **maturing global streaming market**, marked by **regional disparities** in growth, a **shift from free to paid models**, and a **clear move away from traditional TV consumption**. For streaming providers, this suggests a need for **localized strategies**, **content personalization**, and **value-based pricing** to maintain engagement and drive monetization.

Global streaming study 2025: Summary of the key current streaming market dynamics

Competitive intensity

Signs of saturation & subscription fatigue

Although streaming usage (in time spent & subscriptions held) has increased slightly in 2025, the market shows signs of **slowing growth and saturation**:

- **Over one-third** of global streamers feel they are **spending too much on streaming**—a share that holds steady from 2024
- **Views are divided** when it comes to **streaming overload**: about a third agree they have access to more providers than necessary, and a similar share disagrees
- Among **18–39-year-olds**, price sensitivity and saturation sentiment are even stronger, with **50% reporting overspending**

Shifting cancellation behavior

Consumers are increasingly **adding new subscriptions without cancelling existing ones**:

- **40% now take on new subscriptions without replacing old ones, overcoming** for the first year **those who would cancel an existing streaming service** (36%)

Competitive landscape & brand differentiation

Perceived price-value relationship across providers has become more uniform:

- **Netflix & Disney+** retain slightly better value perception, but all major players now fall within a **“consistency corridor”**, where price is broadly seen to match value
- There has been **minimal change** in brand positioning compared to 2024, indicating **low differentiation**
- With price perception no longer a key differentiator, providers are advised to **emphasize unique content offerings** and customer experience to stand out

Churn

Easing churn intention, but content pressure

Intention to cancel at least one streaming subscription has **declined to 35%** in 2025, down 2p.p. from 2024:

- **Sweden & UK** show the largest drops in cancellation intent
- **India & Singapore** are the most churn-sensitive markets, with over **40%** of users indicating likely cancellation
- **Brazil & Japan** show the lowest churn risk (30% or less)

Content dissatisfaction has become a stronger churn driver:

- **63%** of churn-intending users cite at least one **content-related reason**, up from **54%** in 2024
- This highlights **exclusive & diverse content** as a **crucial** factor in user retention

Social media

Social media continues to disrupt viewer behavior

Social media remains a **growing substitute** to streaming:

- **40% of global users** agree that **short-form content on social platforms is as entertaining as streaming series or films**
- 37% claim that **social media replaces streaming**
- The **largest increases** in this sentiment were recorded in **Spain & Sweden** (+7p.p.)
- **Younger users (< 40)** spend **about 1/3 of their entertainment time** on social media, vs. a quarter for older users
- This reinforces the need for streaming services to **engage younger demographics** by offering content tailored to their needs integrating social features

Streaming market shows **early signs of maturity**, marked by: **Plateauing growth** in new subscriptions, **stabilizing churn**, **tighter competitive positioning** with minimal perceived brand differentiation and **increasing competition from social media**, especially among the youth. To remain competitive, **streaming providers** should **invest in exclusive content, optimize the user experience**, and **leverage social engagement strategies** to capture and retain viewers.

Global streaming study 2025: Summary of the seven commercial levers for the future

Content related commercial levers

Offer design related commercial levers

1
Differentiation through content

- Content remains, after price, the most important purchase driver
- Live content is gaining traction: while it still accounts for <20% of viewing time, 48% of streamers (especially younger users) express strong interest in live content, such as music, sports & political events
- Compared to 2024, interest in content-based differentiation, particularly live formats, has expanded, signaling an upsell opportunity via targeted live add-ons

2
Ad-supported subscriptions

- Ad-supported tiers now exceed 30% of subscriber bases for Netflix & Disney+, up significantly from 2024
- Netflix improved acquisition efficiency: In 2025, 60% of ad-supported users are net-new customers, up from 54% in 2024, cannibalization has declined
- Disney+ saw increased downgrading, with 42% of ad-tier users having switched from premium
- Ad design matters: 48% of likely churners in 2025 would stay if offered a cheaper ad-tier, especially if ads are personalized or time-transparent

3
Integration of gaming

- Interest in gaming as part of a streaming subscription remains stable vs 2024
- Over one-third of users are open to a gaming add-on; India shows the highest engagement, while Sweden the lowest
- Willingness to pay for a 'gaming package' add-on has increased among interested users, signaling an emerging monetization lever

4
The rise of superbundles

- Compared to 2024, bundling has moved from emerging trend to mainstream strategy
- 51% of paid subscribers globally now access at least one streaming service as part of a bundle
- Markets such as India, USA, Spain, and Japan lead in superbundle adoption
- Telco-led bundles dominate, except in Japan and the US
- Buying or renting individual titles in addition to the subscription is very valuable for over one quarter of global streamers

5
Account restrictions

- Account sharing levels have plateaued, but 2025 shows a +5p.p. increase in co-users willing to subscribe themselves if restrictions are enforced (58%)
- Monetization potential is strongest in Brazil, India, Japan, and Sweden, while Spain and Australia trail
- The willingness to subscribe in case of restricting access to co-users has increased in all markets except for Singapore and UK

6
Feature-based differentiation

- While interest is growing in features like low-latency live streams (54%), social streaming (55%), and "watch together" functions (68%), these remain secondary levers
- Only 27% consider 4K quality a must-have, and overall awareness and perceived value of technical features is still low
- Compared to 2024, feature appeal has increased, but requires better education and packaging to drive adoption

7
Annual subscriptions

- Churn risk decreases significantly with longer tenure, reinforcing the role of annual subscriptions in loyalty building
- Expected discount for annual subscription is around 30%, although there is a large dispersion per country

The 2025 landscape presents a **clear call to action** for streaming providers: **Go beyond pricing and content basics** by exploring a broad portfolio of commercial levers that align with user values, habits, and expectations. Compared to 2024, the market has shifted towards: **Greater acceptance of advertising**, high **bundling adoption**, **growing appetite for interactive features** and **add-ons** like gaming and stronger **conversion potential from non-paying users** through account restrictions and tailored packages.

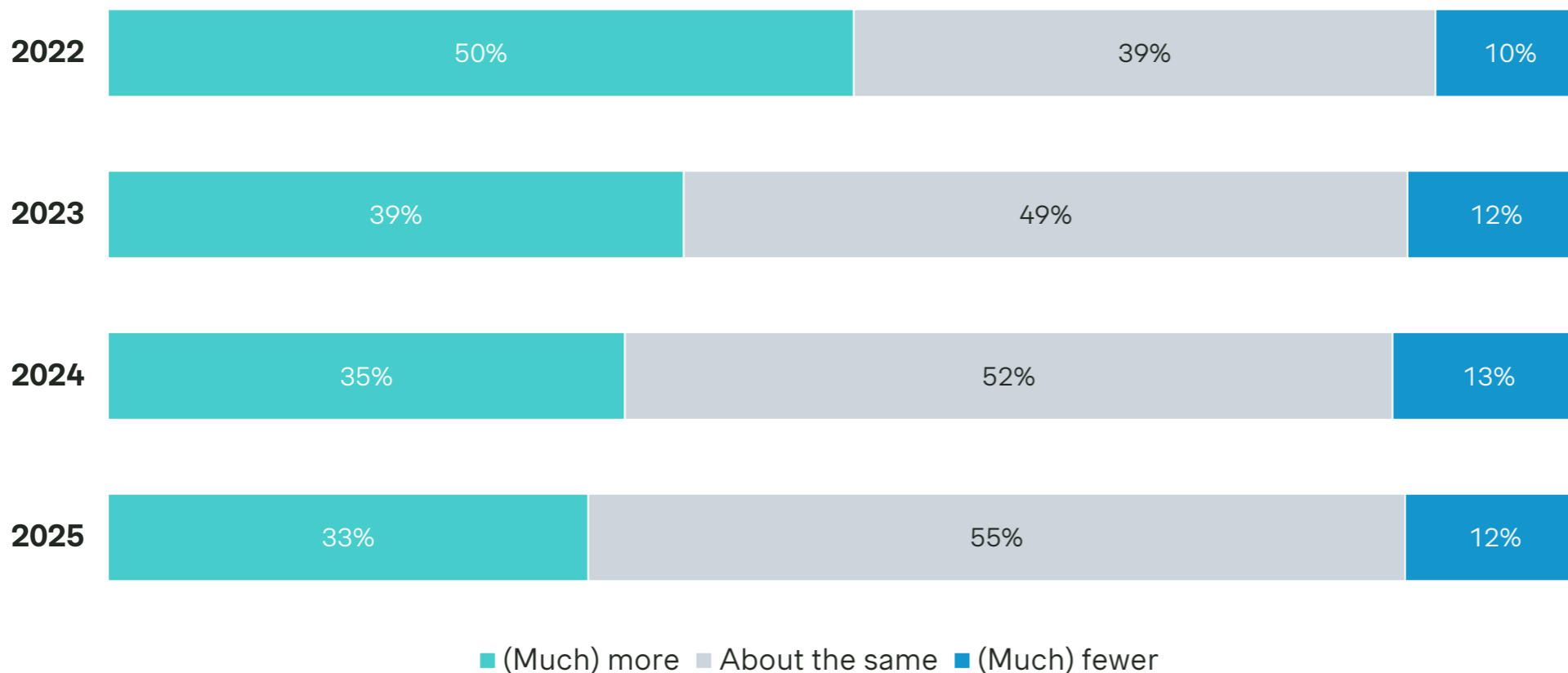
2.

Key trends in streaming behavior



Market development: The global streaming market continues to grow at a similar pace as last year

Change in streaming duration 2022-2025¹



All respondents

- In 2025, **88% of respondents continue to stream the same amount or more** as the previous year
- The **proportion of those streaming about the same has increased by 3 p.p.**, indicating the stabilization of the growth in streaming consumption

Notes: 1) Average of countries tested in all 4 years (Australia, Brazil, Germany, Netherland, Singapore, Spain, Sweden, UK, US)
Question: On an overall level, do you currently spend more or fewer hours per week watching streaming content (e.g. series, films, live events) compared to last year?
Source: Simon-Kucher Global Streaming Study 2022-2025, n = 11,382/11,910/12,163/12,326

Market development: Streaming market continues to grow – with India and Brazil benefiting from particularly strong growth



All respondents

Change in streaming duration by country

Region	Country	Comparison with 2024 (in p.p.)	Comparison with 2024 (in p.p.)			Comparison with 2024 (in p.p.)
			(Much) more	About the same	(Much) fewer	
Europe	Germany	+1	26%	62%	12%	-2
	United Kingdom	+1	30%	56%	14%	-1
	Netherlands	+0	26%	62%	12%	+0
	Sweden	+3	30%	57%	13%	+2
	Spain	-5	26%	62%	12%	-3
North America	USA	-2	38%	51%	11%	-3
LATAM	Brazil	+5	56%	36%	9%	-2
APAC	Australia	-1	30%	57%	13%	-1
	India	n/a ¹	47%	35%	17%	n/a ¹
	Japan	+3	33%	59%	7%	-3
	Singapore	-9	30%	56%	14%	+1

European market is growing significantly less on average compared to other regions. Brazil, India and the USA show strong growth

Spain and Singapore are experiencing an increased share of users streaming about the same (+8p.p. vs 2024), indicating a stabilization of the streaming consumption

Notes: 1) Not tested in Streaming Study 2024
 Question: On an overall level, do you currently spend more or fewer hours per week watching streaming content (e.g. series, films, live events) compared to last year?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

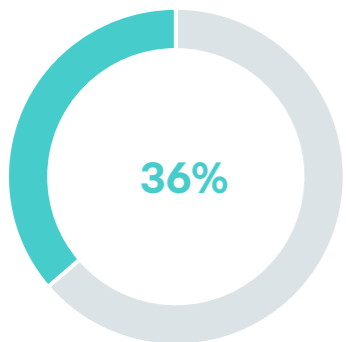
Viewer segments: 36% of streamers are true "content connoisseurs" who always choose their content carefully according to their preferences

All respondents

Content Connoisseur



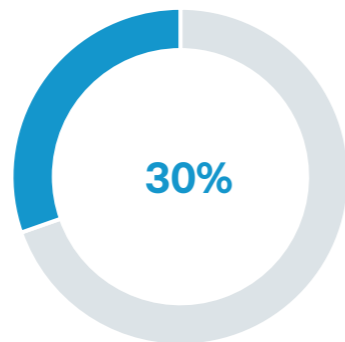
"I carefully select specific content which meets my preferences (e.g., regarding genre)."



Binge Watcher



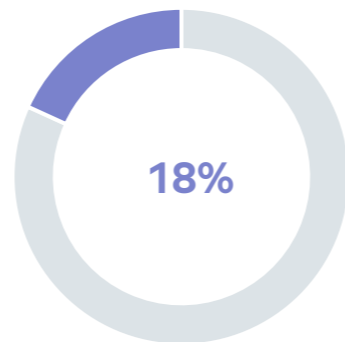
"I devour multiple episodes or movies in one sitting, regardless of whether the content exactly matches."



Mainstream Watcher



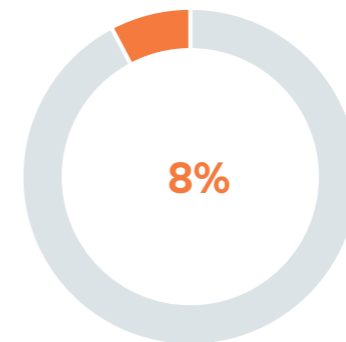
"I mostly stick to popular shows and movies."



Background Watcher



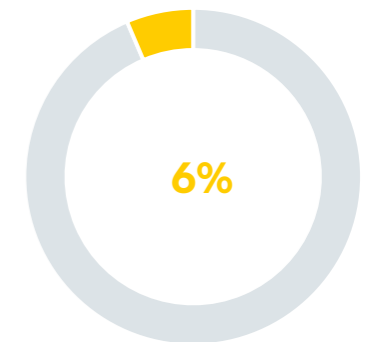
"I often have content playing while doing other things."



Social Watcher



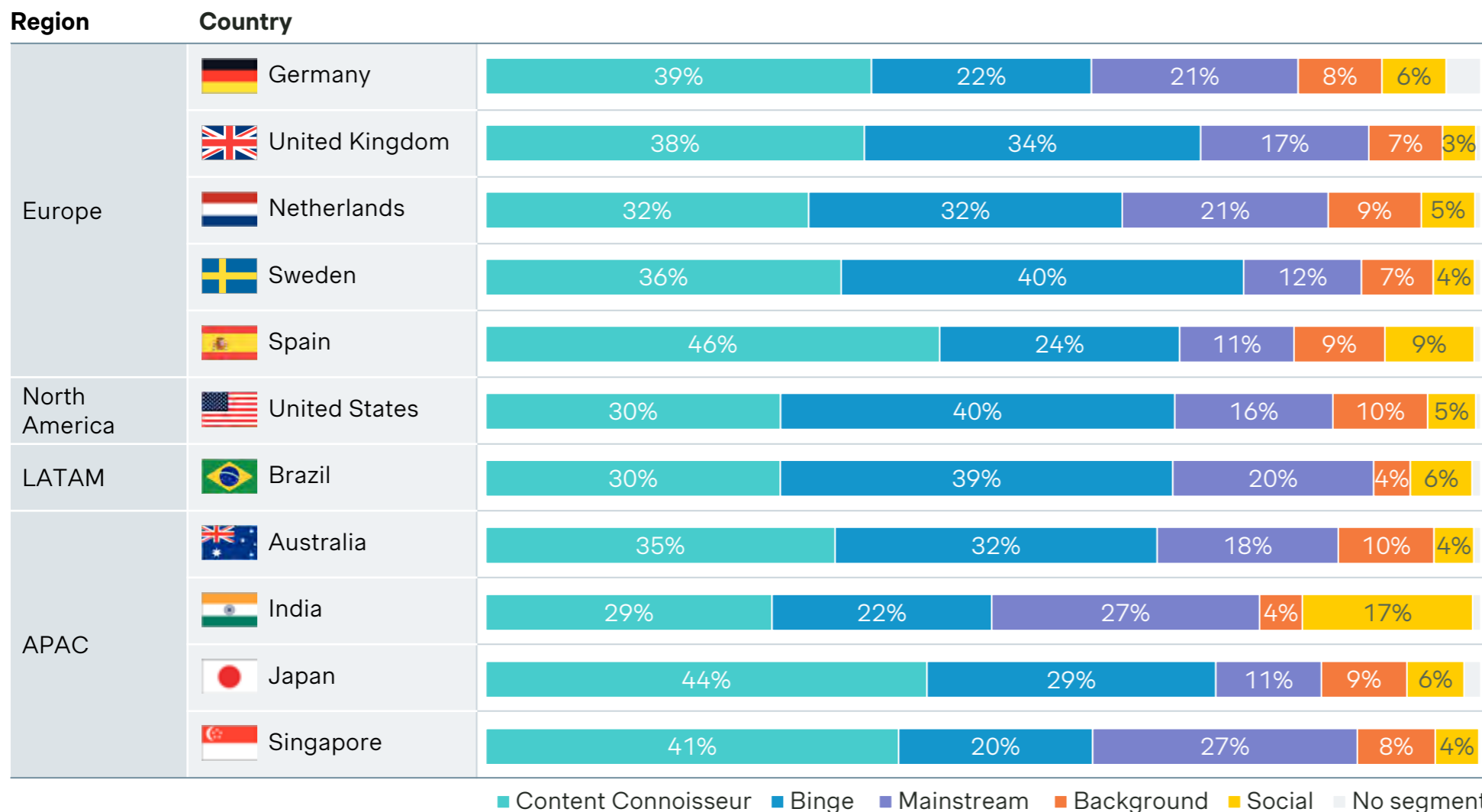
"I primarily watch content with family or friends."



Question: Which of the following streaming segments best describes you and your viewing habits?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Viewer segments: Most streamers are true "content connoisseurs", with more "binge-watchers" in Sweden, the USA and Brazil

Distribution of viewer segments in international comparison



All respondents

In an international comparison, there are the most ...

- **Content Connoisseurs** (*always choose content carefully*): **Spain**
- **Binge-watcher** (*devour multiple episodes/movies in one sitting*): **Sweden, USA and Brazil**
- **Mainstream watchers** (*mainly watch popular shows/series/movies*): **Singapore and India**
- **Background watchers** (*watch content while doing something else in parallel*): **USA and Australia**
- **Social watchers** (*watch content with family and friends*): **India**

Question: Which of the following streaming segments best describes you and your viewing habits?

Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Role of linear TV: Traditional television is becoming less important in all countries – especially in Spain, India and Singapore

Role of streaming services vs. linear TV (% of respondents)

Region	Country	"Streaming services replace traditional TV for me"	"Traditional TV has become irrelevant"
Europe	Germany	61% Agree, 19% Neutral, 20% Disagree	38% Agree, 24% Neutral, 38% Disagree
	United Kingdom	60% Agree, 22% Neutral, 18% Disagree	35% Agree, 27% Neutral, 38% Disagree
	Netherlands	59% Agree, 20% Neutral, 21% Disagree	28% Agree, 29% Neutral, 44% Disagree
	Sweden	66% Agree, 19% Neutral, 14% Disagree	39% Agree, 28% Neutral, 32% Disagree
	Spain	70% Agree, 17% Neutral, 13% Disagree	54% Agree, 24% Neutral, 22% Disagree
North America	United States	68% Agree, 17% Neutral, 15% Disagree	45% Agree, 29% Neutral, 26% Disagree
LATAM	Brazil	78% Agree, 12% Neutral, 11% Disagree	45% Agree, 25% Neutral, 30% Disagree
APAC	Australia	65% Agree, 22% Neutral, 14% Disagree	38% Agree, 28% Neutral, 34% Disagree
	India	73% Agree, 20% Neutral, 8% Disagree	53% Agree, 29% Neutral, 19% Disagree
	Japan	53% Agree, 34% Neutral, 13% Disagree	37% Agree, 31% Neutral, 32% Disagree
	Singapore	76% Agree, 15% Neutral, 9% Disagree	50% Agree, 28% Neutral, 22% Disagree

Agree Neutral Disagree

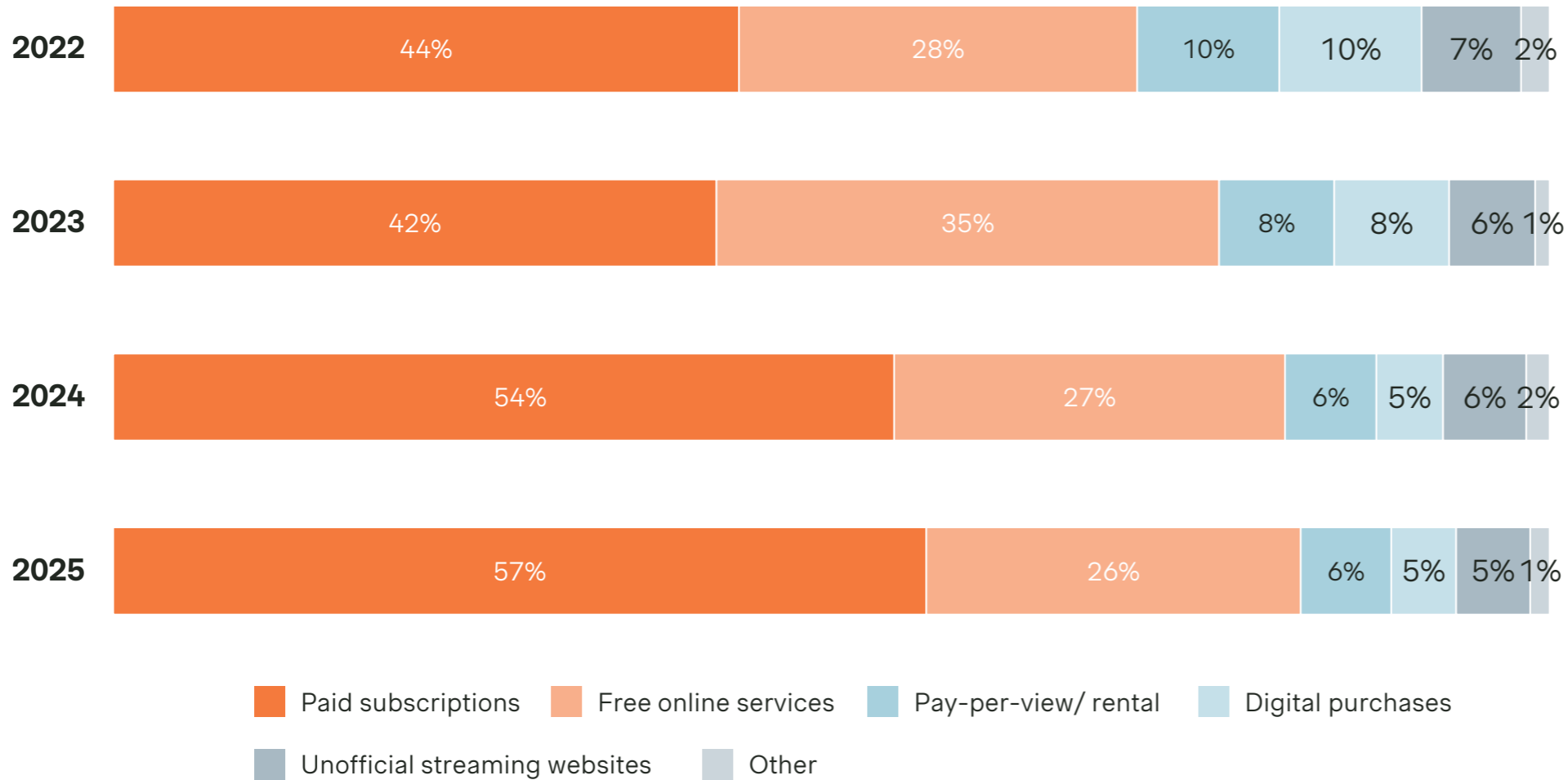
All respondents

- The relevance of traditional television varies greatly in an international comparison
- For **over half** of the streamers in **Spain, Singapore and India**, traditional TV has already become irrelevant and for **over 70%** of the streamers in these countries, **streaming services are replacing linear TV**
- Although **streaming services are increasingly replacing traditional TV** for individual streaming users, linear television continues to play a **meaningful role** at a **societal level**

Question: How much do you agree with the statements below?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Paid subscriptions: Compared to 2024, the amount of streaming via paid subscriptions has increased, while the use of free online services keeps decreasing

Distribution of streaming usage by provider category¹



Countries tested in all 4 years

- Compared to the Streaming Study 2024, there has been an **increase in streaming time via paid subscriptions (+3p.p.)**
- Free online service usage** continues to **decrease for the 3rd year in a row**, but at a slower rate

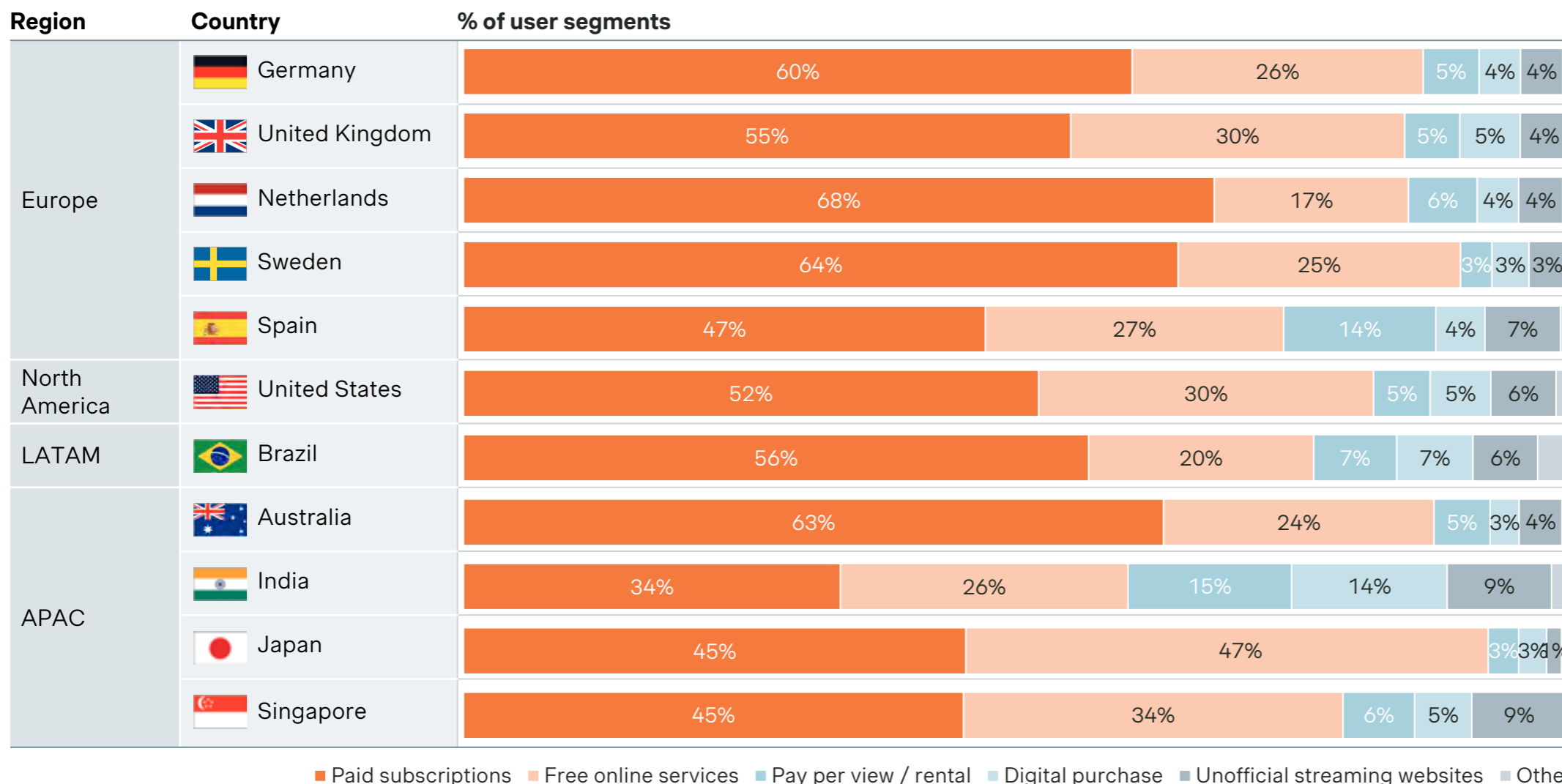
Notes: 1) Average of countries tested in all 4 years (Australia, Brazil, Germany, Netherland, Singapore, Spain, Sweden, UK, US)
 Question: How would you estimate your time spent watching is split between the following providers?
 Source: Simon-Kucher Global Streaming Study 2022-2025, n = 11,382/11,910/12,163/12,326

Paid subscriptions: All countries have seen an increase in streaming via paid subscription vs free, pay per view, digital purchase or other sources of streaming



All respondents

Distribution of streaming usage by provider category



No country has seen a decrease in the share of paid subscription in comparison to the 2024 Streaming Study

India has the lowest share of paid subscription across all countries, having in turn the biggest share in digital purchases

Compared to the 2024 Streaming Study, Japan has the highest increase in paid subscription time (+12p.p.)

Question: How would you estimate your time spent watching is split between the following providers?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Paid subscriptions: At the global level, the average number of paid subscriptions has increased compared to 2024

Average number of paid subscriptions per respondent by country

Region	Country	Average number of subscriptions paid for the respondent himself	Comparison with 2024
Europe	Germany	2.8	+ 0.1
	United Kingdom	2.6	+0.2
	Netherlands	2.8	+0.1
	Sweden	2.6	+0.0
	Spain	2.8	+0.1
North America	United States	3.8	+0.2
LATAM	Brazil	3.7	+0.3
APAC	Australia	3.2	+0.1
	India	4.4	n/a ¹
	Japan	2.4	+0.3
	Singapore	2.8	-0.2

Global '23 (2.5) Global '25 (3.0)

Global '24 (2.8)

Notes: 1) Not tested in Streaming Study 2024, values rounded;
 Global avg '25 estimated excluding India to compare against the available countries in 2024
 Question: Which of the below subscriptions do you have access to and/or personally pay for?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 7,242 with at least 1 self-paid subscription)

Paid subscribers

- The average number of paid subscriptions is similar in Europe, fluctuating between 2.6 and 2.8 subscriptions
- Compared to Europe, there are significantly more paid subscriptions in the USA (Ø 3.8) and Brazil (Ø 3.7) – but the front-runner is India with an average of 4.4 paid subscriptions
- The fewest streaming subscriptions, on the other hand, are in Japan with an average of 2.4 paid subscriptions
- The number of paid subscriptions has increased slightly in all countries surveyed, except for Sweden (no change from the previous year) and Singapore, where the number of paid subscriptions is declining

Streaming budgets: The willingness to pay for all streaming subscriptions has increased in all countries compared to the previous year

Willingness to pay per month for all streaming subscriptions by country (absolute & relative change)

Region	Country	Willingness to pay all subscriptions	Change compared to 2024 in %
Europe	Germany	30 EUR	30%
	United Kingdom	30 GBP	11%
	Netherlands	30 EUR	17%
	Sweden	350 SEK	16%
	Spain	30 EUR	18%
North America	United States	40 USD	12%
LATAM	Brazil	120 BRL	33%
APAC	Australia	40 AUD	13%
	India	500 INR	n/a ¹
	Japan	2000 JPY	29%
	Singapore	40 SGD	20%

All respondents

- **Willingness to pay for all subscriptions** per streamer (streaming budgets) has increased by 20% across all countries compared to 2024
- In an **international comparison, Germany, Brazil and Japan** are **driving the increase** – in these countries, the budget has increased by around 30%
- The **lowest** budget growth is in the **UK, USA and Australia**

Notes: 1) Not tested in Streaming Study 2024

Question: Thinking about your overall monthly spend on all your streaming subscriptions, potentially across multiple providers: What total amount paid per month would you consider to be Expensive, so that you would have to think about the cost?

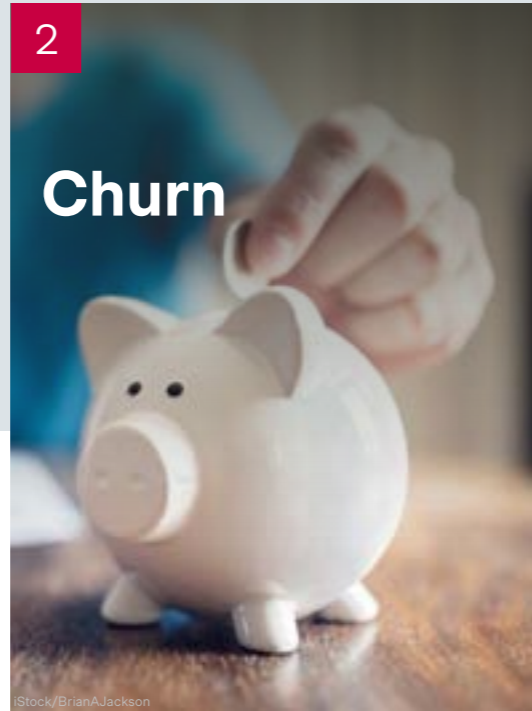
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

A living room scene with a bookshelf, a lamp, and a TV displaying a streaming interface. The TV screen shows a grid of colorful thumbnails, likely representing a streaming service's content library. A smartphone is propped up on the right side of the sofa.

3.

Key current streaming market dynamics

Streaming market dynamics



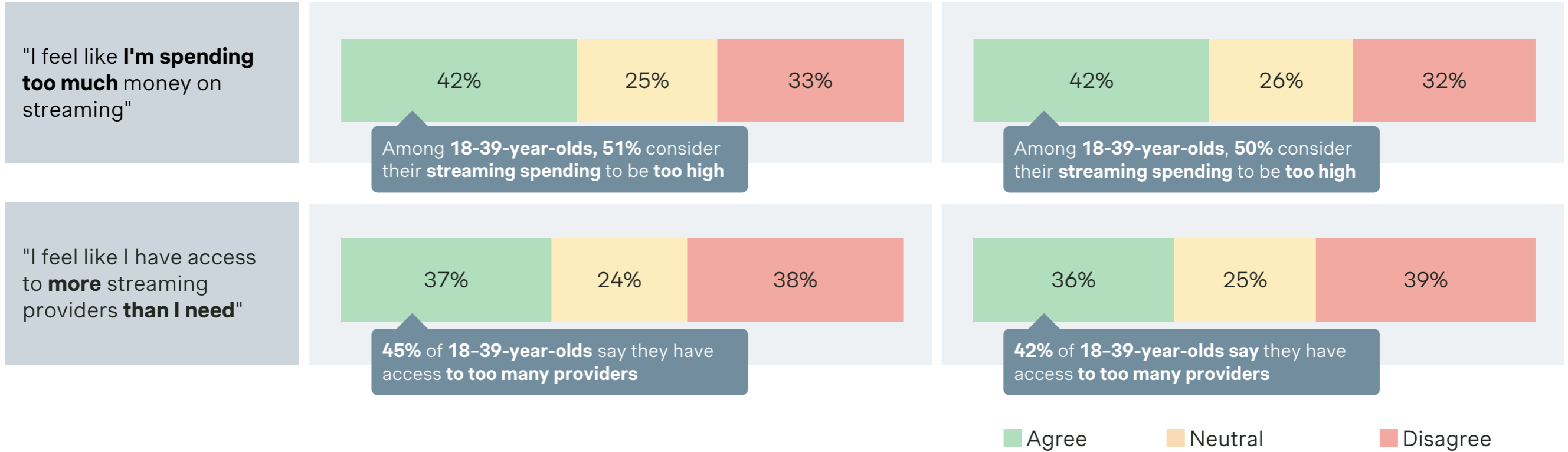
There are early signs that growth of streaming hours might slow down further due to the following **three** reasons

Competitive pressure: Cost sensitivity remains the norm across streamers but the share of streamers who feel having too many subscriptions is the same as those who don't

Agreement with statements about streaming budgets and provider access

Streaming Study 2024

Streaming Study 2025



- Streaming usage in terms of duration and number of subscriptions has increased slightly in 2025, but **there are more streamers who feel like they are spending too much money on streaming when compared to those who disagree** with this statement.
- About **a third** say they currently have **access to more streaming services** than they actually **need**, but there is another 40% who disagree with this.

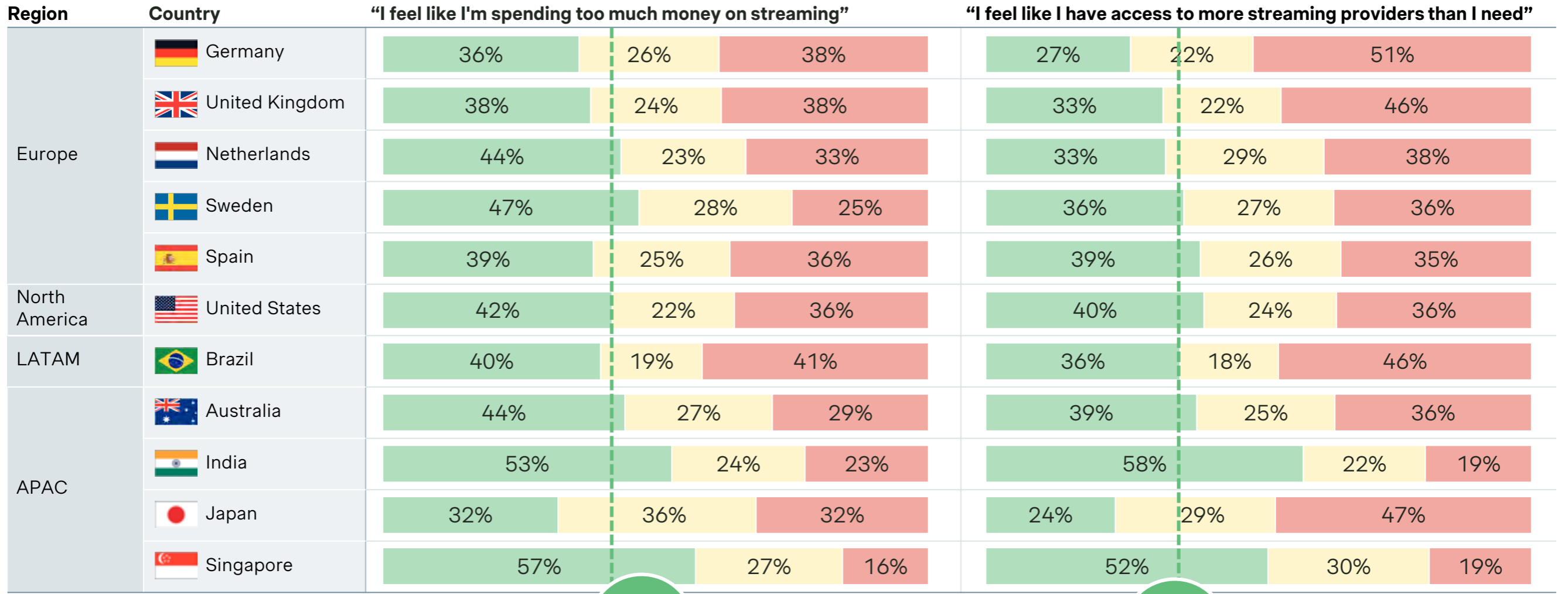
Notes: Global avg '25 estimated excluding India to compare against the available countries in 2024
 Question: When it comes to streaming subscriptions, how far do you agree with the statements below?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 7,242 with at least 1 self-paid subscription)

Subscription fatigue: Subscription fatigue has stabilized, especially prevalent in India and Singapore



Paid subscribers

Reaction when taking out a new streaming subscription



Ø 42% (+0p.p. vs. 2024)

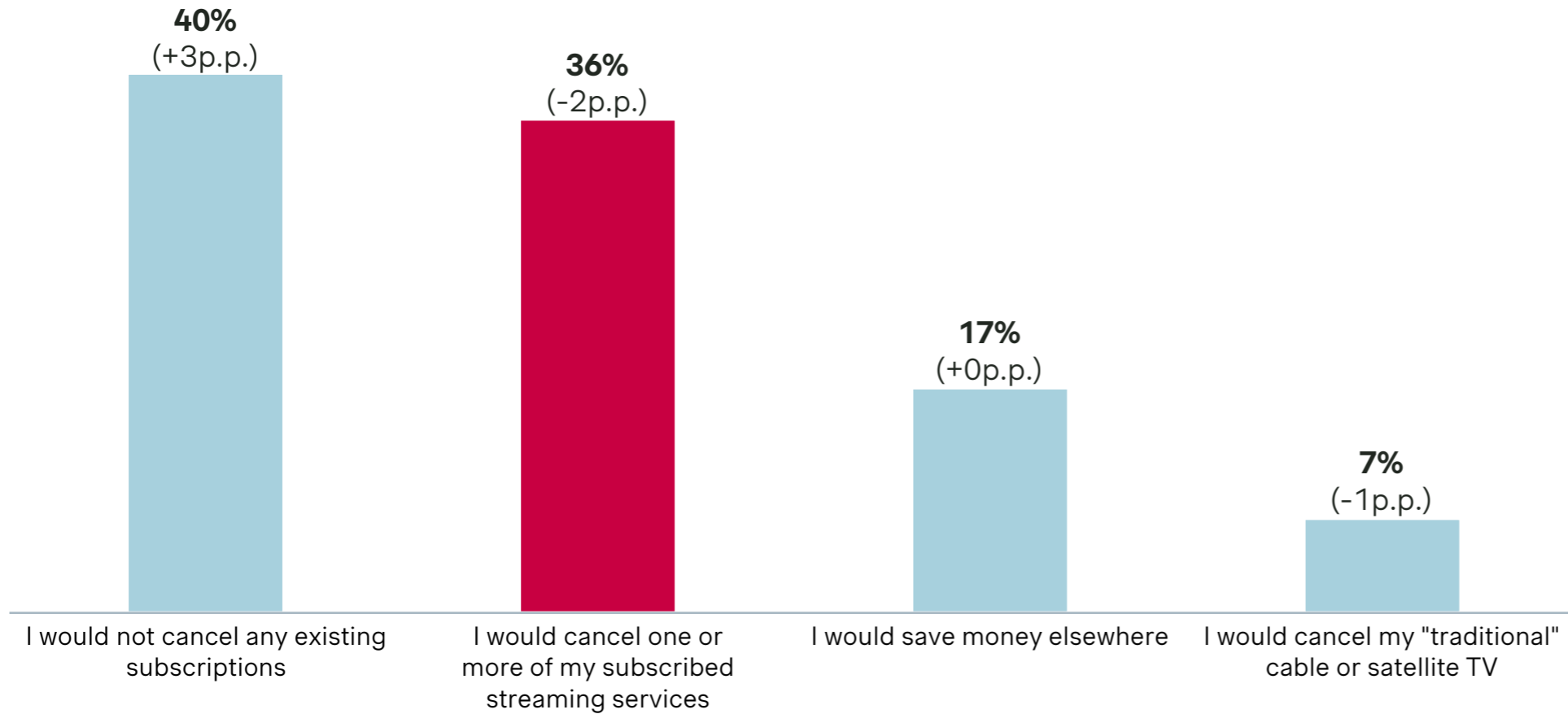
Ø 36% (-1p.p. vs. 2024)

■ Agree ■ Neutral ■ Disagree

Notes: Global avg '25 estimated excluding India to compare against the available countries in 2024
 Question: When it comes to streaming subscriptions, how far do you agree with the statements below?
 Source: Simon-Kucher Global Streaming Study 2025; n = 12,326 (n = 7,242 with at least 1 self-paid subscription)

Replacement of existing subscriptions is declining: Most users now add new services without cancelling current ones, though a notable share still opt to replace

Reaction when taking out a new streaming subscription (incl. comparison to 2024¹)



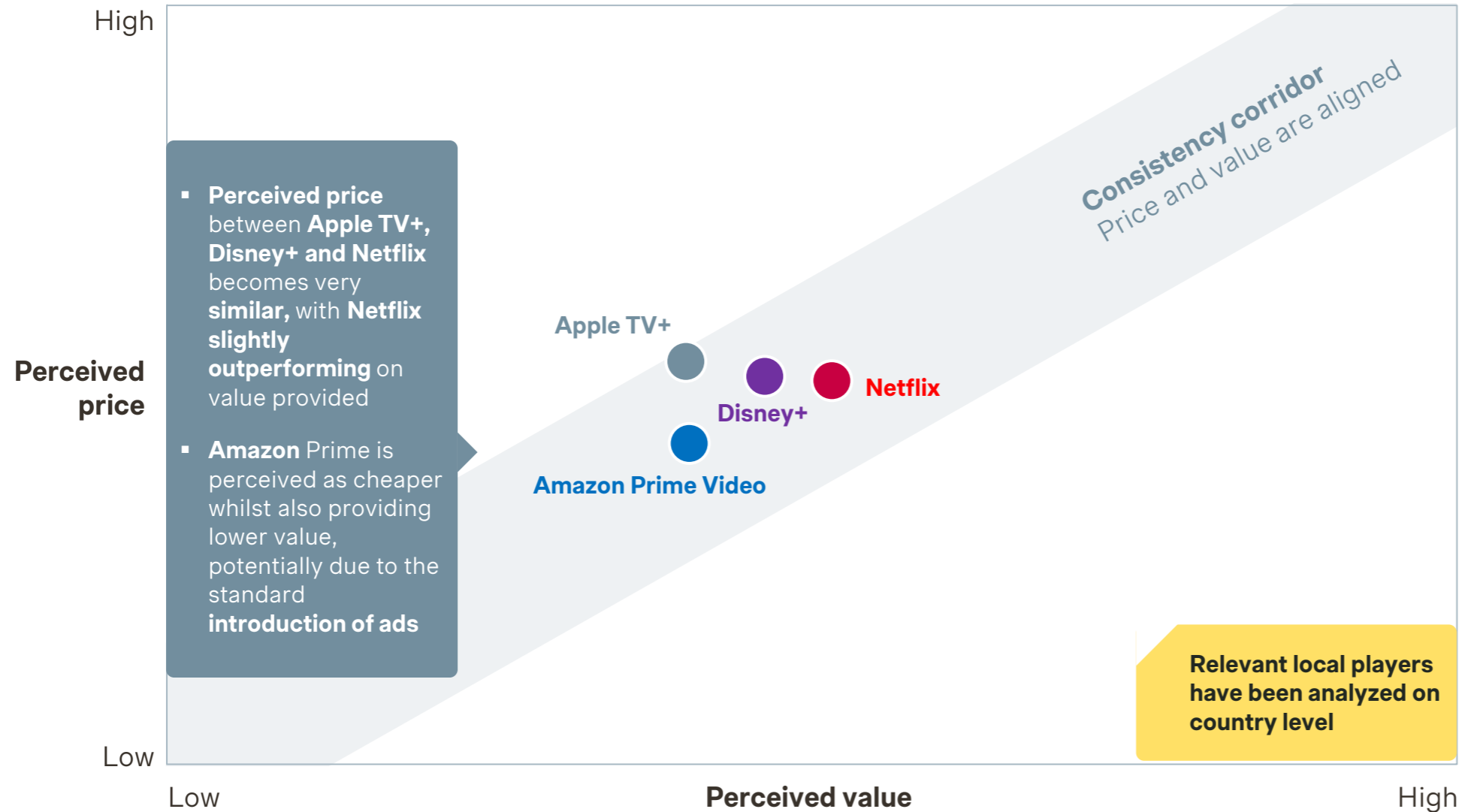
Countries tested in 2024 & 2025

- Many respondents (40%) indicated they **would not cancel any existing subscriptions** before acquiring a new one, with this number **increasing vs last year (+3p.p.)**
- Some streamers still prioritize **cancelling traditional TV over cutting other streaming services**, contributing to the ongoing growth of the streaming market. However, this preference **has slightly declined compared to last year**

Notes: 1) Average change for countries tested in both 2024 and 2025 (Australia, Brazil, Germany, Japan, Netherlands, Singapore, Spain, Sweden, UK, US)
Question: If you subscribed to a new streaming service, which of the statements below would most likely apply to you?
Source: Simon-Kucher Global Streaming Study 2025, Global n = 12,326

Value map: Providers are perceived as performing very similarly in terms of both value and price, suggesting consumers are increasingly viewing them as interchangeable

Price-value map: perceived price vs. perceived value by provider on a global level



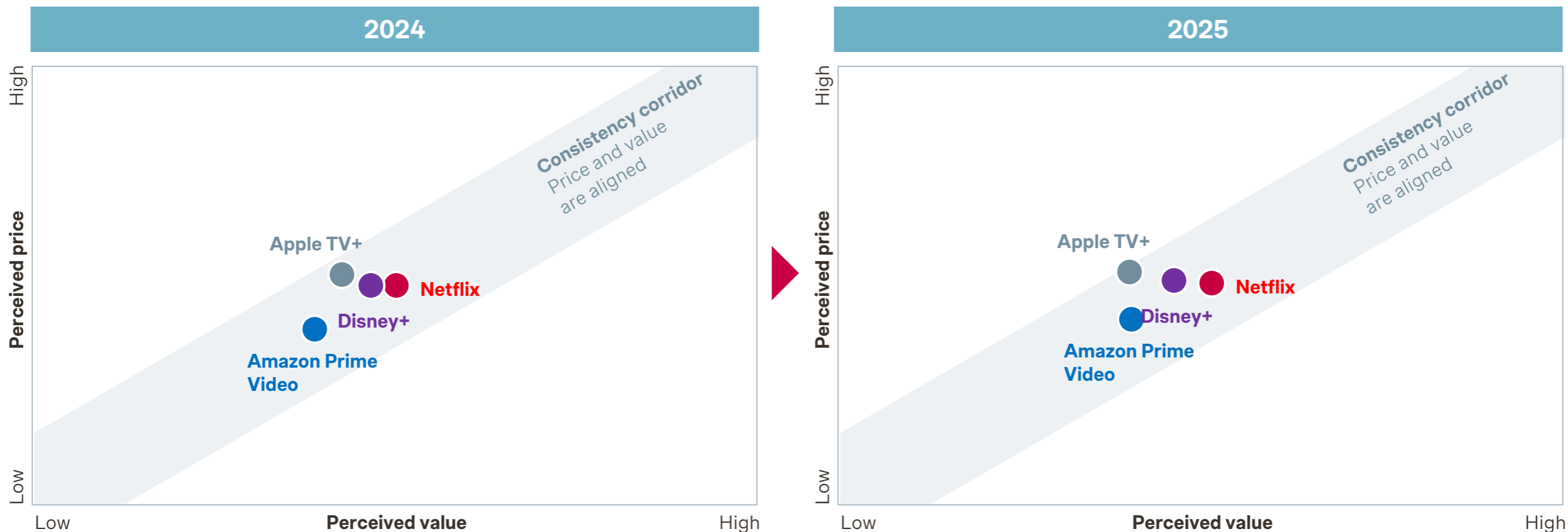
All respondents

- Subscribers perceive a relatively similar **value delivered by each provider**, with **Disney+** and **Netflix** having a slightly better perceived value than Amazon and Apple TV+
- Regarding the **price-value relationship**, all players are now within the **consistency corridor**, which means that subscribers perceive that the respective **prices reflect the product value**
- Price increases without also increasing the perceived product value** would bring the **price-value relationship out of equilibrium** – subscribers might conclude that the product value does not justify the higher price and subsequently churn

Question I: How important are the following criteria when deciding whether to purchase a streaming subscription? Question II: How satisfied are you with [streaming provider] with regard to each of the following decision criteria?
Source: Simon-Kucher Global Streaming Study 2025, Global n = 12,326

Value map: Small change in competitive positioning compared to last year, with Netflix's and Prime video's perceived value increasing a bit vs last year

Price-value map: perceived price vs. perceived value by provider on a global level, 2024 vs. 2025



- Brands continue to be perceived similarly in terms of price and value, likely because they all employ comparable monetization strategies, such as offering various packages and implementing password restrictions.
- To enhance differentiation, providers should prioritize content as a primary differentiator, considering it the second most significant purchase criterion.

Question I: How important are the following criteria when deciding whether to purchase a streaming subscription? Question II: How satisfied are you with [streaming provider] with regard to each of the following decision criteria?
Source: Simon-Kucher Global Streaming Study 2023/2024/2025; Global n = 11,910/12,163/12,326

Likelihood to cancel: A significant share (35%) of global subscribers' plan to cancel at least one subscription, and this share has decreased from last year

Indicated intention to cancel within the next 12 months, by country

Region	Country	% of respondents who indicated an intention to cancel a streaming subscription within the next 12 months	Comparison with 2024 (in p.p.)
Europe	Germany	32%	-1
	United Kingdom	33%	-5
	Netherlands	37%	+2
	Sweden	36%	-7
	Spain	33%	+2
North America	United States	40%	-2
LATAM	Brazil	30%	-4
APAC	Australia	38%	-1
	India	54%	n/a ¹
	Japan	24%	+0
	Singapore	42%	-2
Global '25 (35%)			Ø -2 p.p.

All respondents

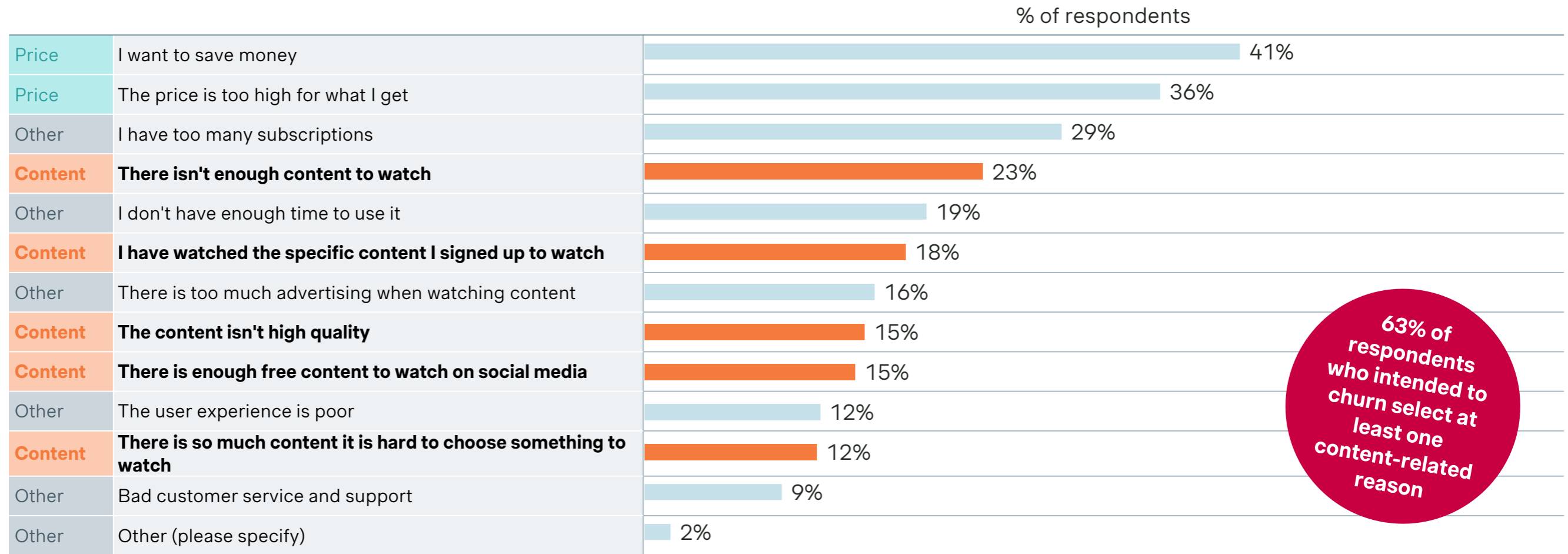
- In an international comparison, the intention to churn has generally **decreased**, especially in **Sweden** and **United Kingdom**
- **The Netherlands** and **Spain** are the only countries in the study with a slight **increase in the intention to quit** (+2p.p.)
- It can be assumed that there will be **less movement in the streaming market in the future** due to the significantly **lower termination intentions**
- **India** and **Singapore** are the countries with the **highest intention to quit** (over 40%)
- **Brazil** and **Japan** are the countries with the **least intention to quit** (30% or less)

Notes: 1) Not tested in Streaming Study 2024; Values rounded;
 Global avg '25 estimated excluding India to compare against the available countries in 2024
 Question: How likely are you to cancel each of your subscriptions within the next 12 months?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326
 Simon-Kucher | The Global Streaming Study 2025

Cancellation reasons: Apart from price, content-related reasons are the key drivers for why subscribers are planning on cancelling a subscription

Reason for intended cancellation (multi-select)

Respondents with churn likelihood



63% of respondents who intended to churn select at least one content-related reason

Offering a broad selection of unique content is an effective lever to mitigate churn.

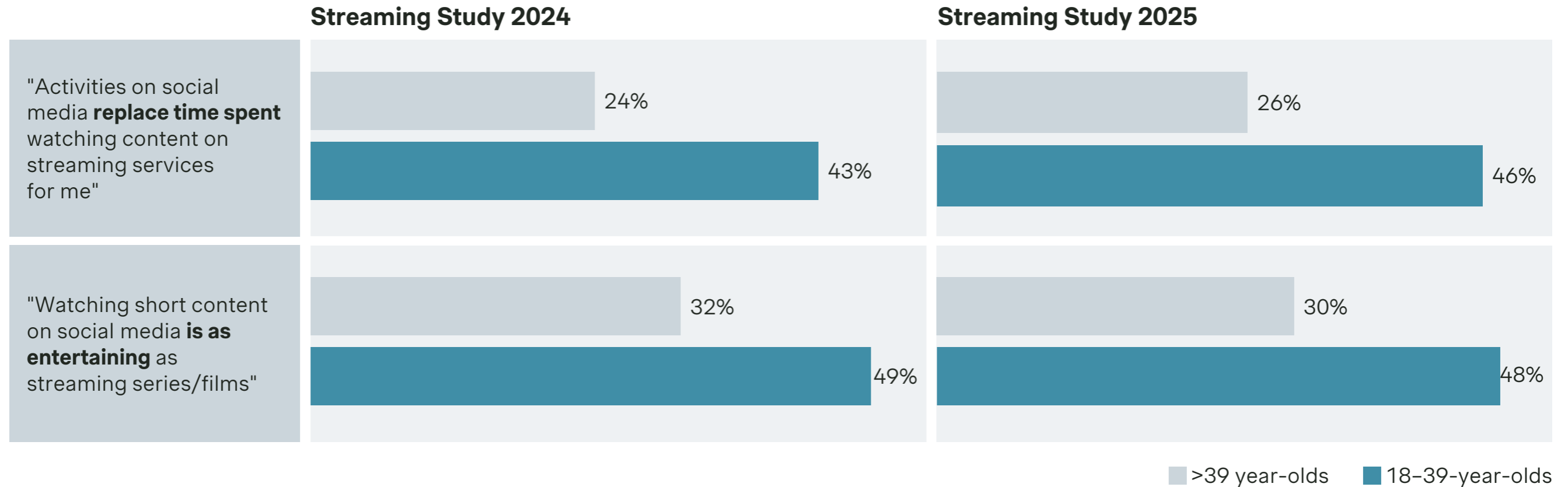
Compared to the 2024 Streaming Study, both content-related and price-related reasons have increased.

Question: What are the reasons you are considering cancelling your subscription?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 4,704 with indicated intention to cancel within the next 12 months)

Social media keeps competing against streaming

Agreement with statements about streaming & Social media (% of respondents)

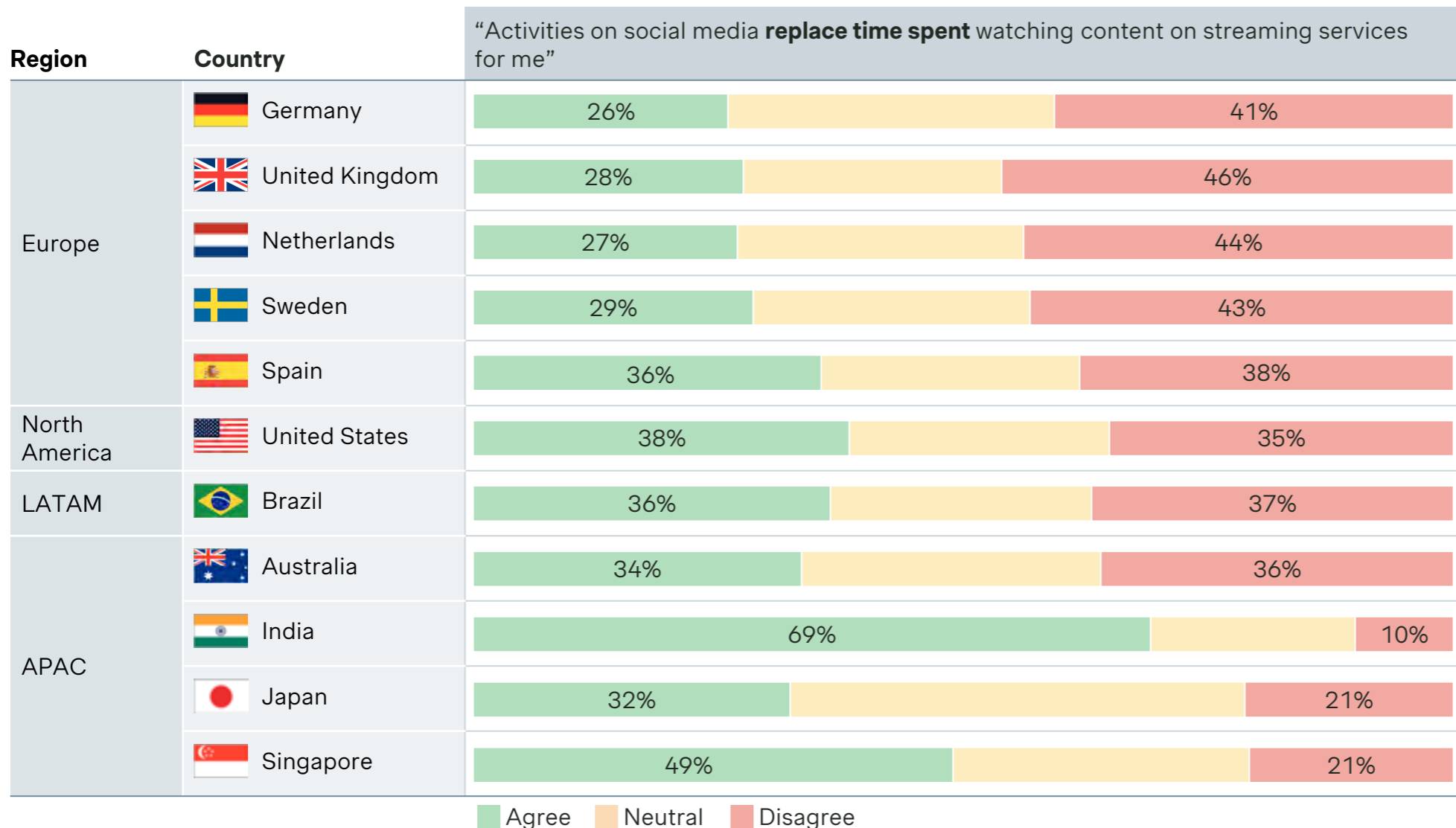
Countries tested in 2024 & 2025



Providers should offer attractive content and features tailored to younger target groups to ensure long-term retention. In the social media sphere, short-form content such as teasers or behind-the-scenes footage can effectively engage younger users.

There is significant variation in attitudes towards social media and streaming between countries, on average 37% of streamers replace streaming with social media

Agreement with statements about streaming & Social media (% of respondents)

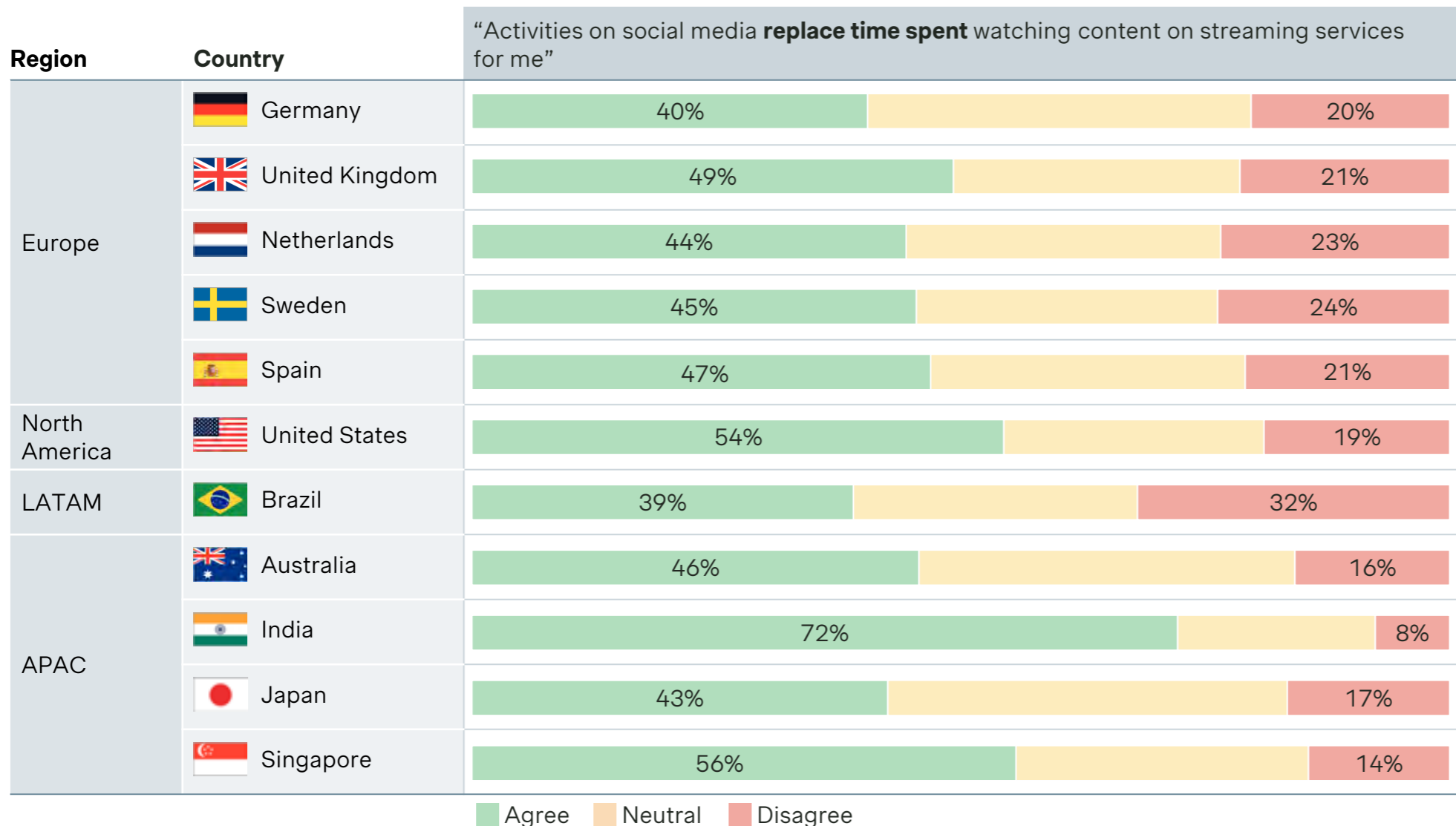


All respondents

- India and Singapore have the biggest social media pull (49% and over), whilst European countries have the lowest (less than 30% except for Spain)
- Compared to the 2024 Streaming Study, Spain and Sweden have seen the biggest rise in social media pull (+7p.p.)
- Only Singapore and United Kingdom have seen a decrease compared to last year (around -3p.p.)

Especially younger streamers below 40 years replace streaming with social media, on average 49% of young streamers see them as substitutable

Agreement with statements about streaming & Social media (% of respondents)



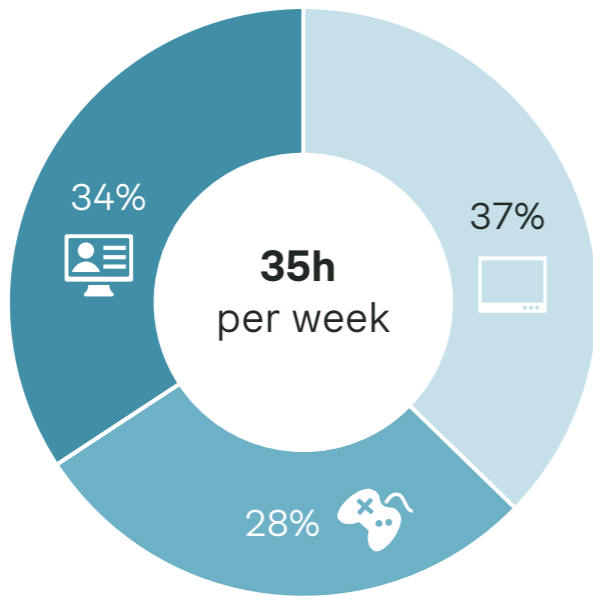
18-39 y/o respondents

- India, Singapore and United States have the **biggest social media pull** among younger streamers (over 54% agreement), whilst **Brazil** and **Germany** have the **lowest** (40% and under)
- Compared to the **2024 Streaming Study**, Netherlands and Sweden have seen the **biggest rise in social media pull** among the younger streamers (+9p.p. and +11p.p. respectively)
- Only **Germany**, **Singapore** and **United Kingdom** have seen a **decrease** compared to last year (around -2p.p.)

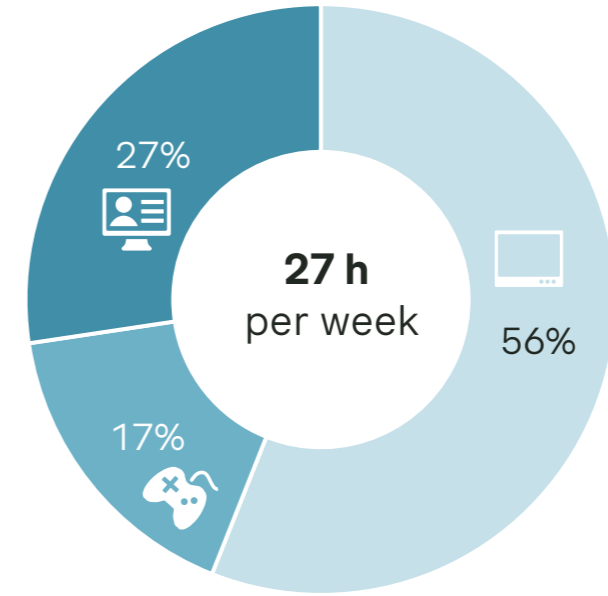
The younger target audience already spends 1/3 of their usage time on social media, while those over 40 years old spend only about 1/4 of their usage time on social media

All respondents

Age group: Under 40 years distribution
of usage time on streaming, gaming & social media



Age group: Over 40 years distribution
of usage time on streaming, gaming & social media



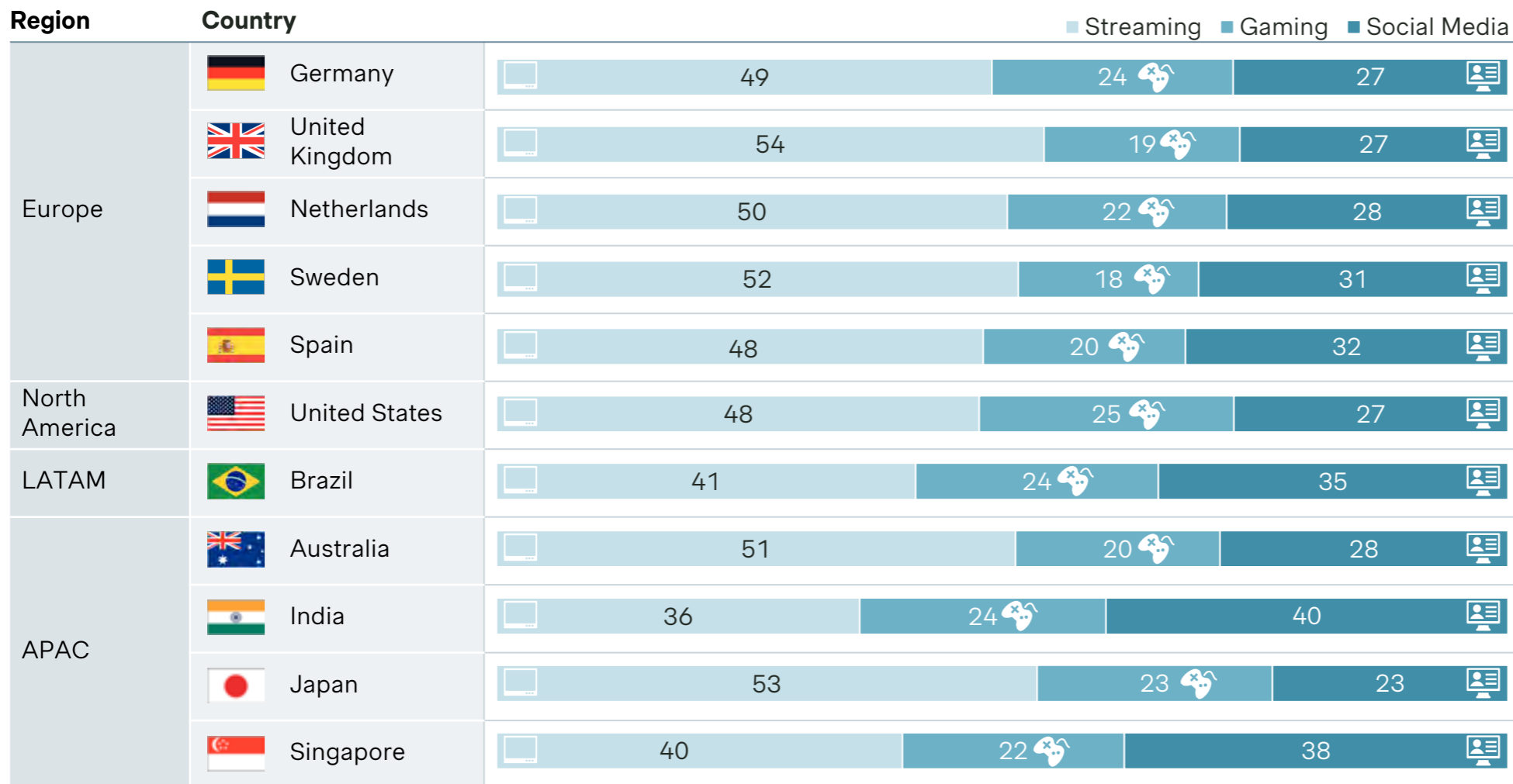
■ Streaming
■ Gaming
■ Social Media

Social media and gaming are mainly used by the younger target group. At an average of 35 hours a week, the younger target group also spends significantly more time on social media, gaming and streaming compared to those over 40 years.

Questions: How would you estimate your time is split between streaming, gaming and the use of social media? Please distribute 100 points among the options below
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

European countries, Australia and Japan spend around 50% of their time streaming vs gaming or social media, Brazil, India and Singapore have the highest share of social media

Distribution of usage time on streaming, gaming and social media in %



All respondents

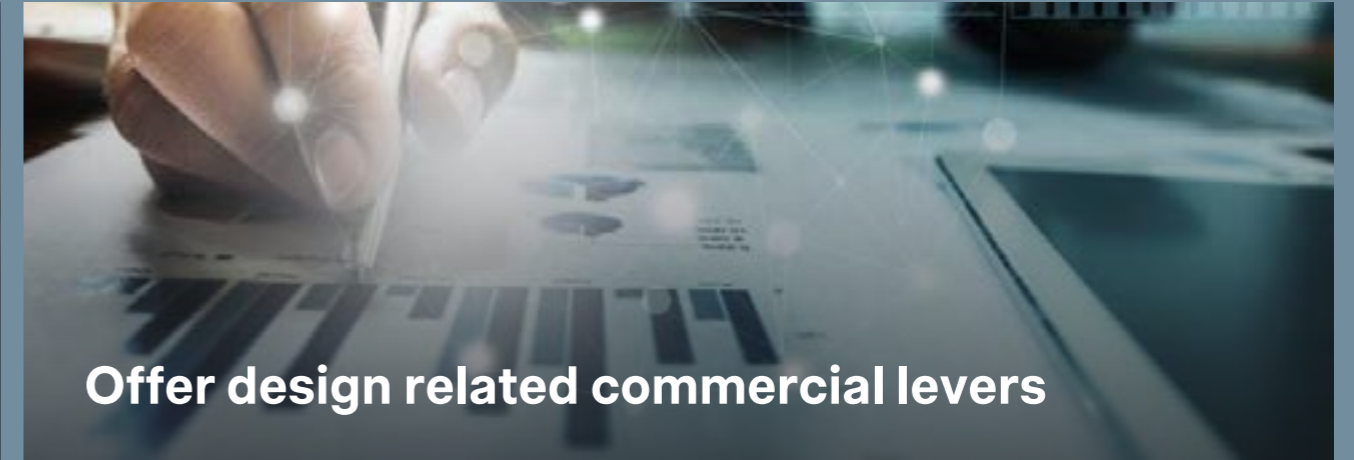
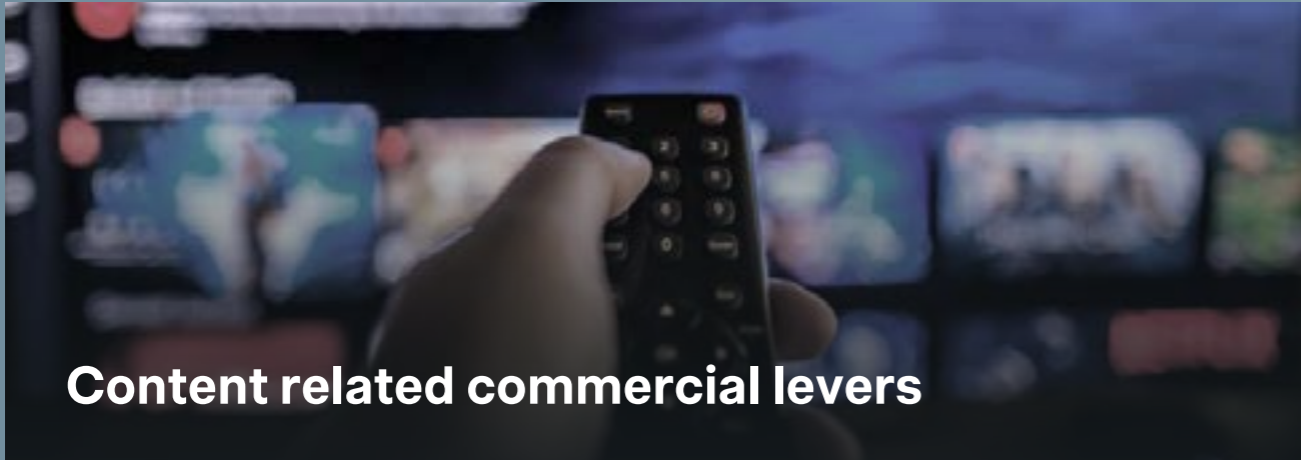
- **Distribution of time for social media** ranges from **23%** (Japan) to **40%** (India)
- The **time share** also **varies significantly** for **streaming** from **36%** (India) to **54%** (UK) – **Differences** are explained by the **time spent in social media**
- **The relevance of gaming** is quite **similar: Streamers** spend between **18%** (Sweden) and **25%** (USA) of their **entertainment time on gaming**



4.

Commercial levers for the future

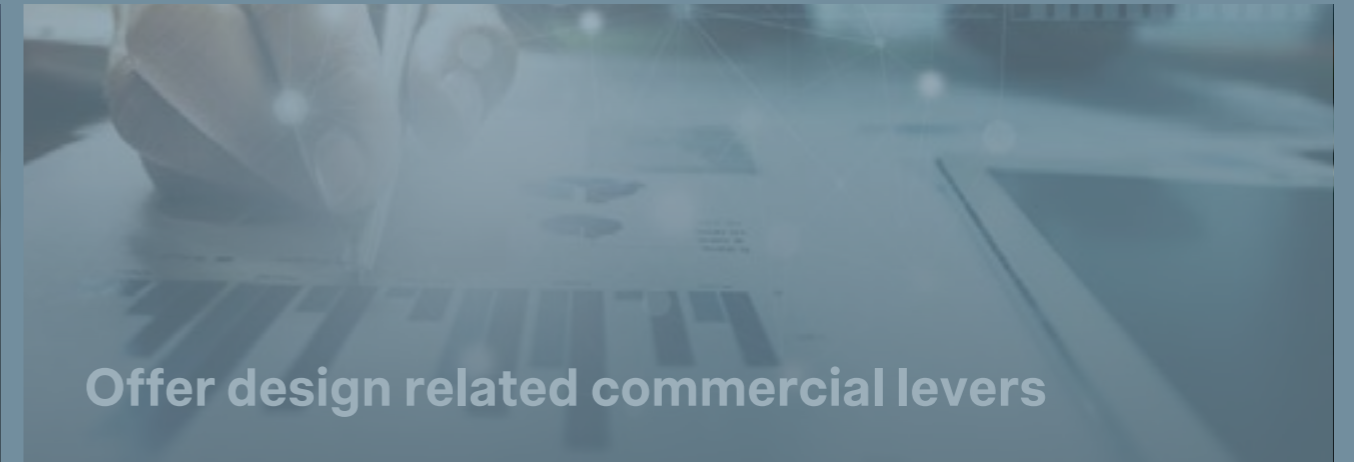
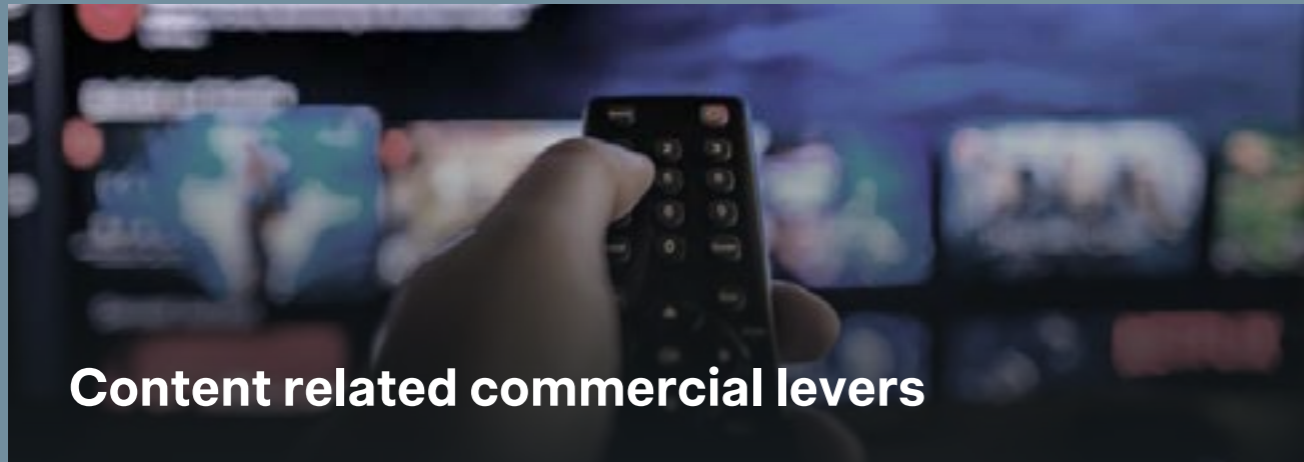
Commercial levers: To create more differentiation and attract a new generation of streamers, streaming providers could explore several levers for their proposition



- 01 Differentiation through content
- 02 Optimization of ad-supported subscriptions
- 03 Gaming as part of the streaming proposition

- 04 Superbundles & Buying/Renting options
- 05 Usage of account restrictions
- 06 Differentiation through other features
- 07 Annual subscriptions for customer loyalty

Commercial levers: To create more differentiation and attract a new generation of streamers, streaming providers could explore several levers for their proposition



- 01** Differentiation through content
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- 07 Annual subscriptions for customer loyalty

Importance of content: Content is the most important differentiator for streaming providers after price

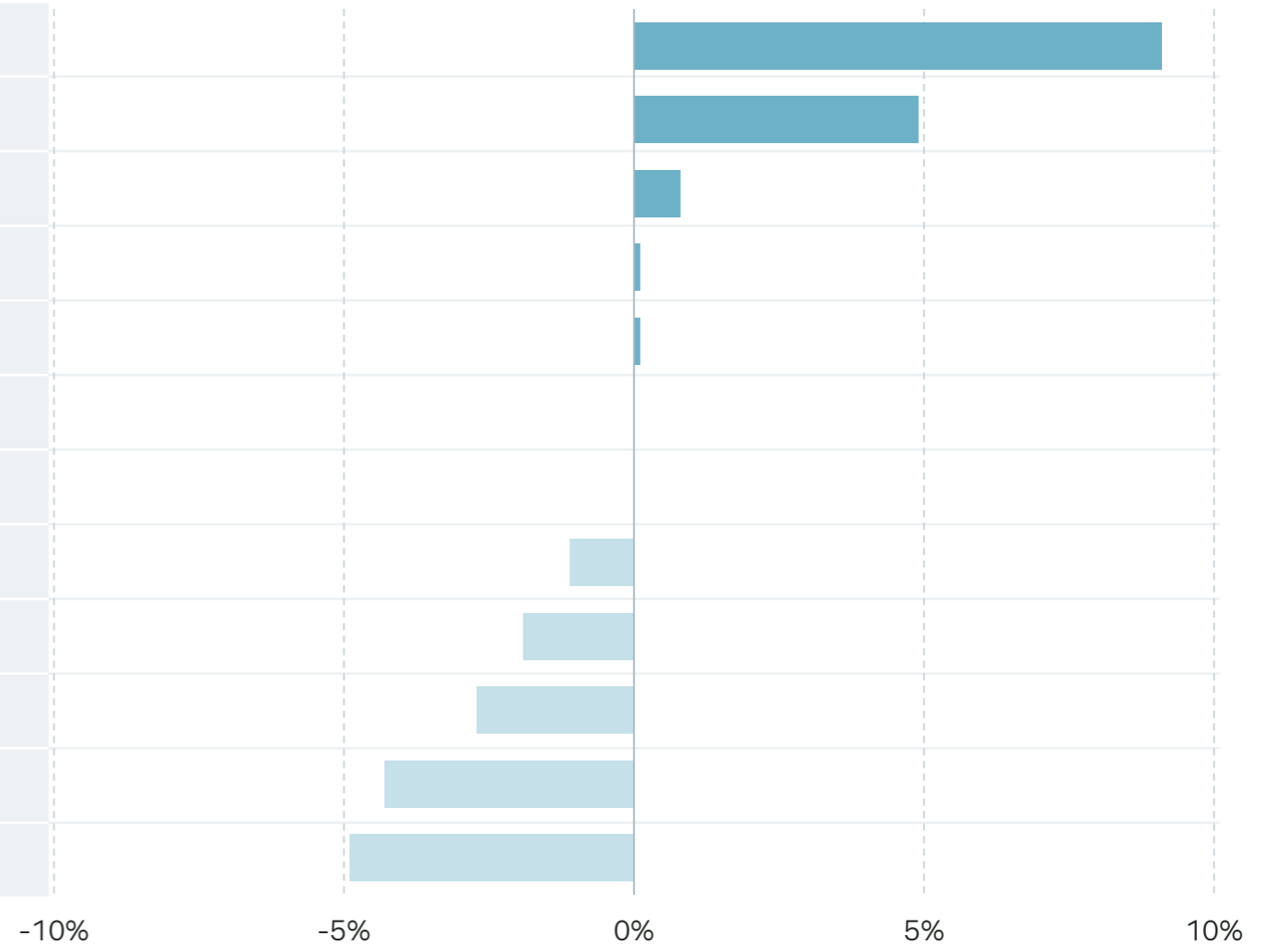


All respondents

Value drivers

1	Subscription price
2	Broad selection of content
3	Flexibility to cancel anytime
4	High video quality (i.e., 4k resolution or HDR)
5	Frequency of new content added to the platform
6	Content you can't get anywhere else
7	No adverts
8	Ease of use (e.g. user interface, app experience)
9	Availability on multiple platforms (e.g. mobile app, TV etc)
10	Availability of discounted family or couples' subscription plans
11	Content that everyone is talking about
12	Showing recommendations on what to watch next

Relative importance vs. average in %



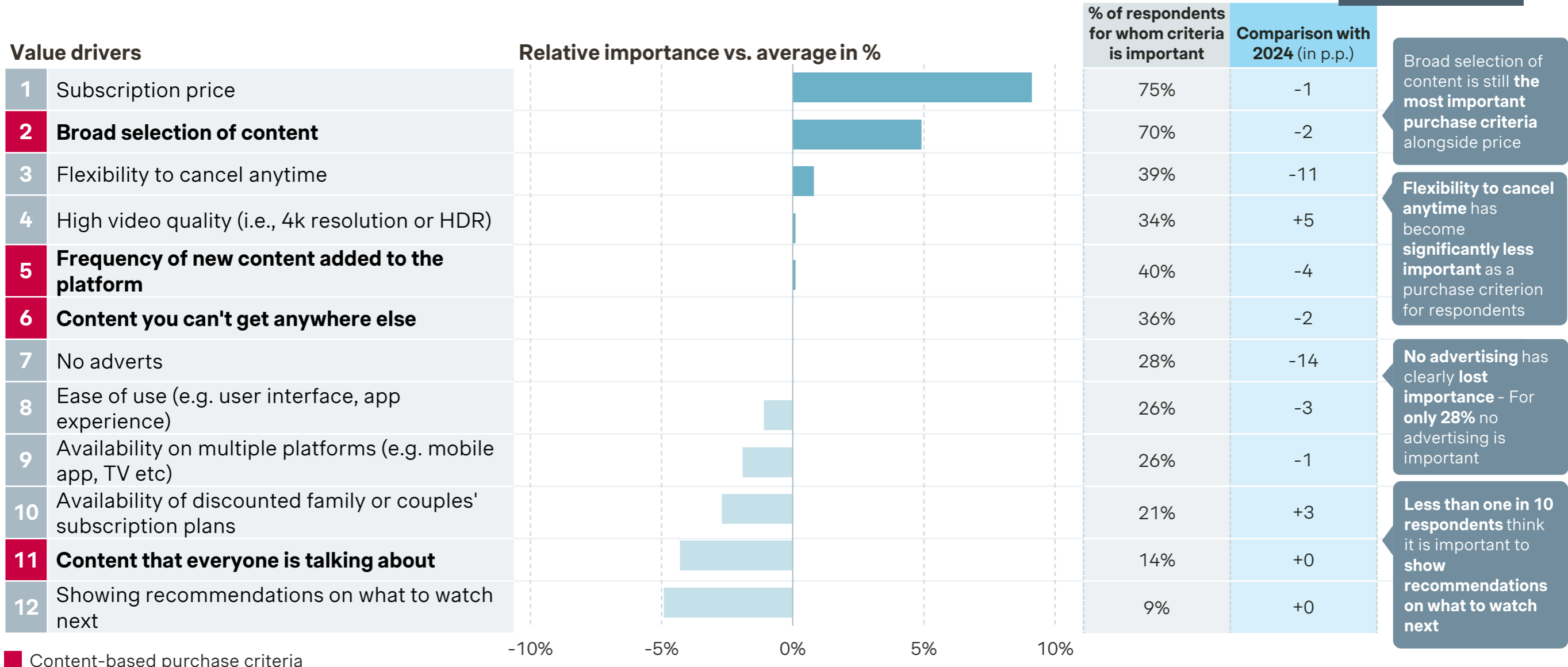
■ Content-based purchase criteria

Question: How important are the following criteria when deciding whether to purchase a streaming subscription?
 Source: Simon-Kucher Global Streaming Study 2025, Global n = 12,326

Importance of content: Content remains the most important differentiator for streaming providers after price



All respondents



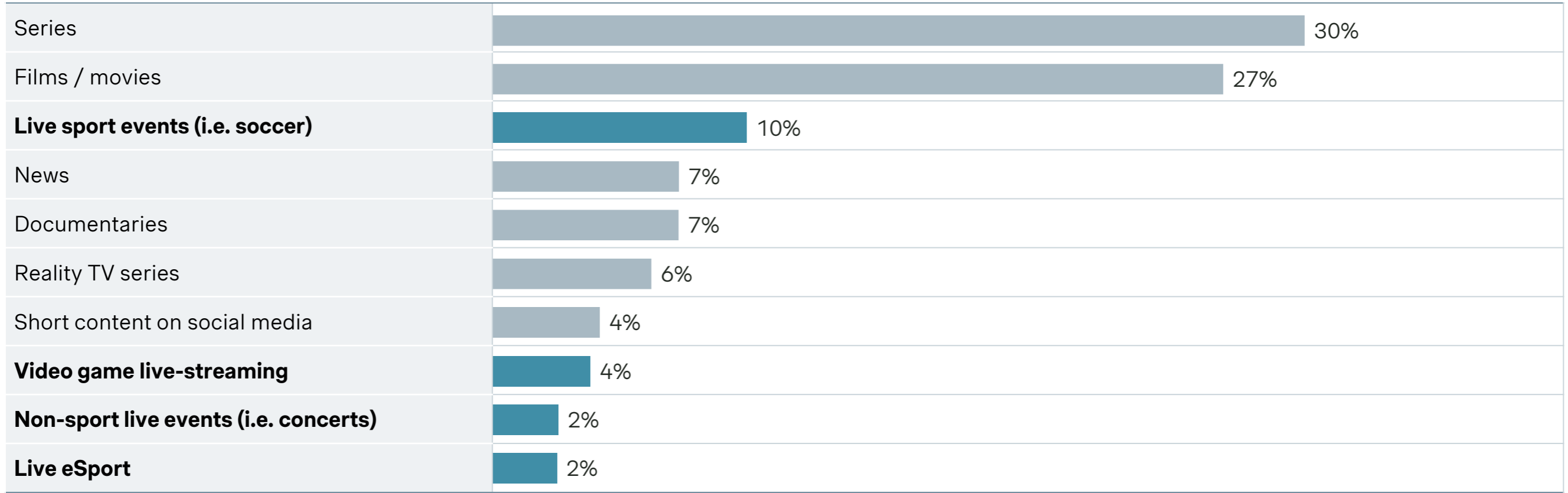
■ Content-based purchase criteria

Question: How important are the following criteria when deciding whether to purchase a streaming subscription?
 Source: Simon-Kucher Global Streaming Study 2025, Global n = 12,326

Global content preferences: Over 50% of streaming time is spent on series or movies, while below 20% of streaming time spent on live content

Distribution of weekly streaming duration by content

Distribution of streaming duration by content (% of streaming time)



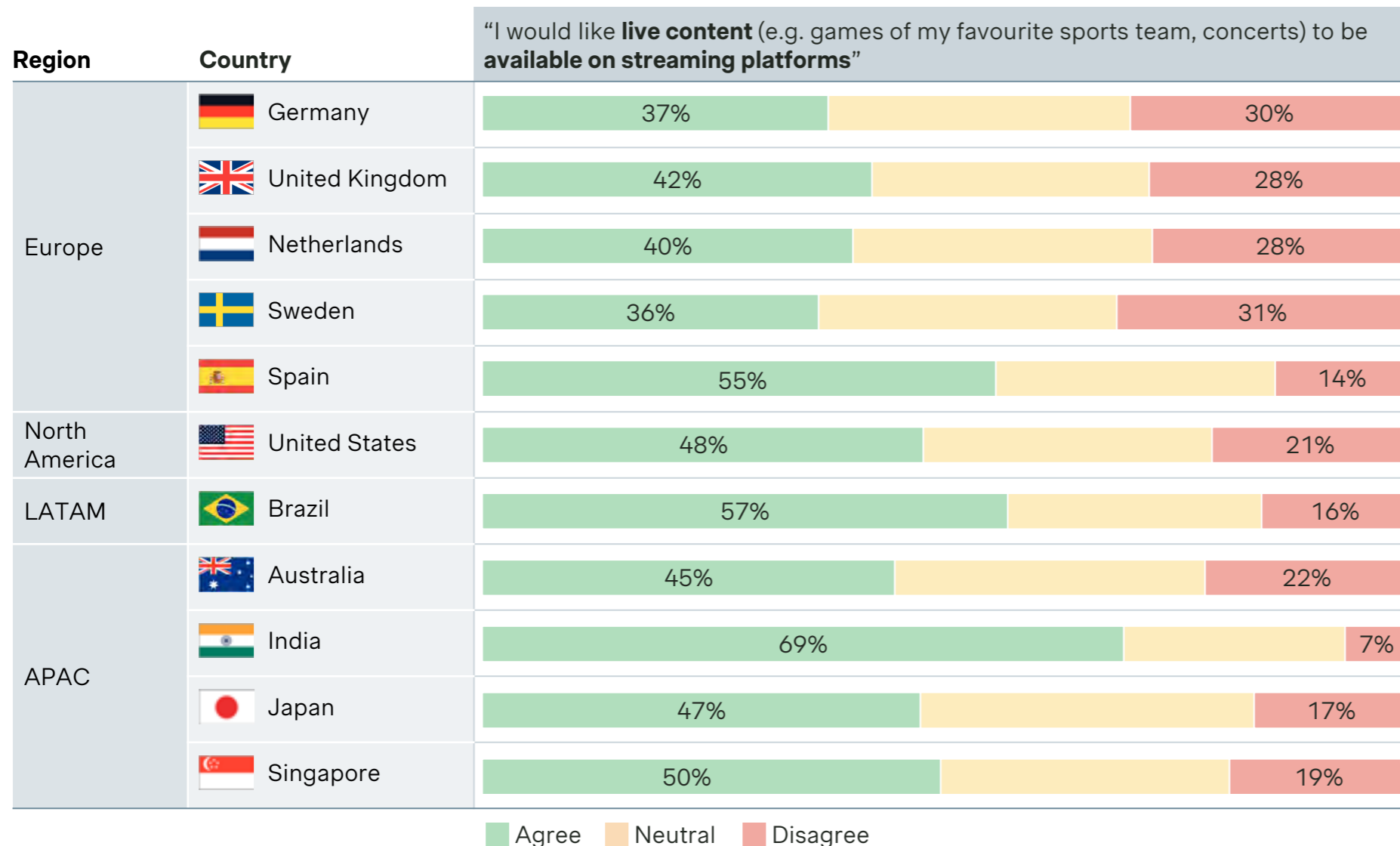
Live content is especially popular among the younger target group: 18–39-year-olds stream more live content (21% vs.18%).

Question: Thinking about the type of content you like to watch, how would you estimate your time spent watching content via streaming is split between the following types of content?
Source: Simon-Kucher Global Streaming Study 2025, Global n = 12,326

Global content preferences: Around 50% of respondents would like to have live content available on streaming platforms



Agreement with content-related statements



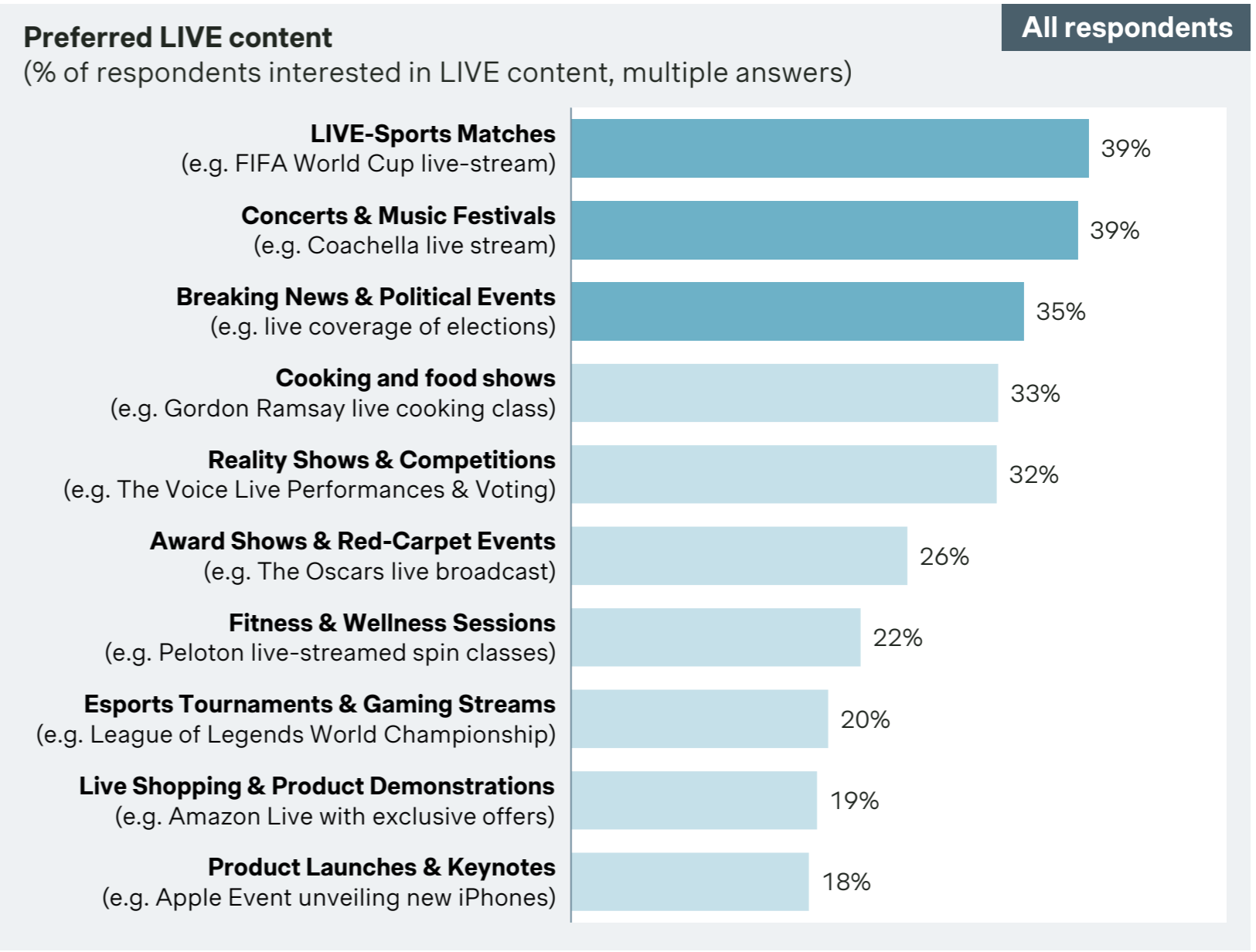
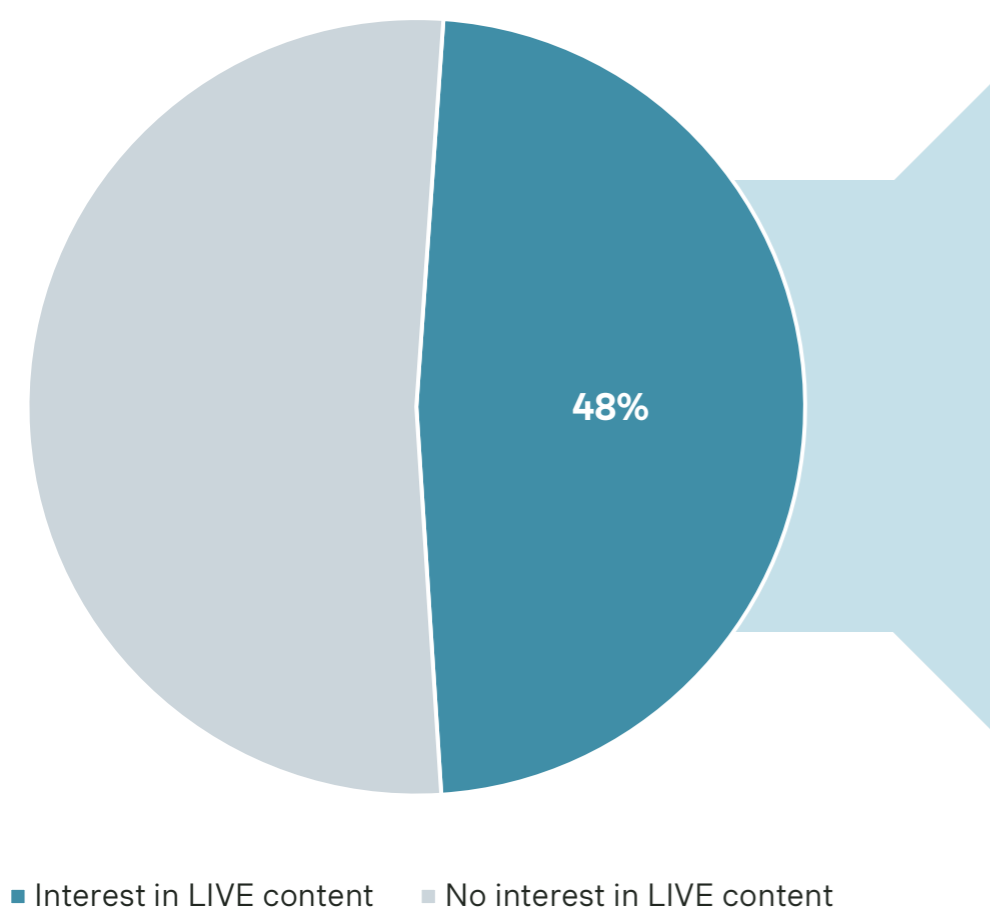
All respondents

- **Live content** is an **attractive added value** in their streaming subscription for **48% of streamers** - especially the younger target group is interested
- Standalone **live packages** or **add-ons with live content** can provide an upsell path for interested users without making uninterested customers feel like they're paying for content they don't want
- Adding **live content** to **general packages** may be challenging as **nearly half of users show no interest**, which calls for **smarter and more segmented packaging strategies**

Question: When it comes to streaming content, to what extent do you agree with the statements below?
 Source: Simon-Kucher Global Streaming Study 2025, Global n = 12,326

Global content preferences: Streamers with an interest in live content want live streams of sports, music, and breaking news

% of respondents who would like to have LIVE content on streaming platforms

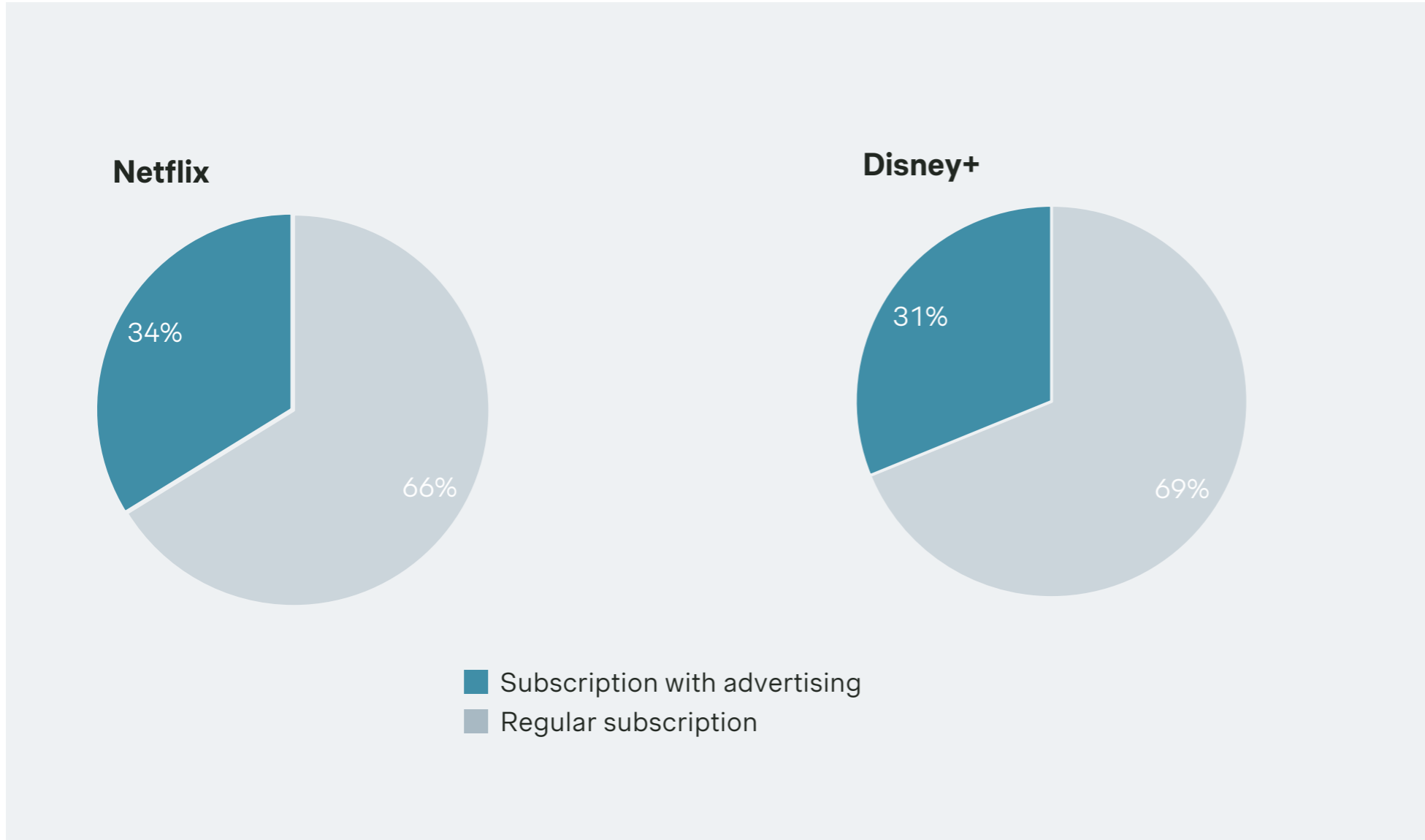


Question I: When it comes to streaming content, to what extent do you agree with the statements below? Question II: You said you would like live content to be available on streaming platforms. Which types of live content would interest you?
Source: Simon-Kucher Global Streaming Study 2025, Global n = 12,326

Success of ad-packages: The ad-supported pack-mix has surpassed 30% of total subscribers for both Netflix and Disney+

% of subscribers of the respective providers with ad-financed subscription vs. ad-free

Paid subscribers with available ad package



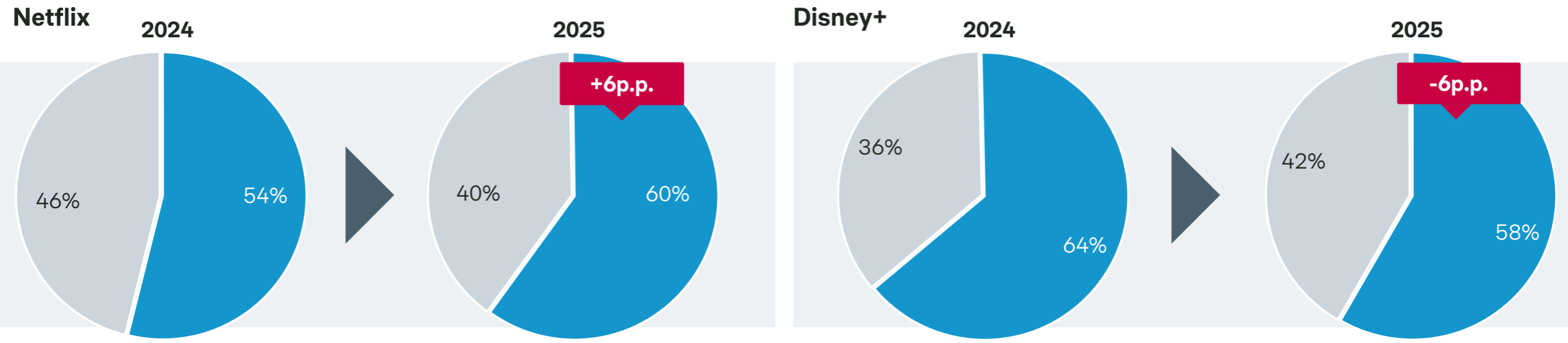
- **Netflix and Disney+** offer **discounted packages with advertisement**, while **Amazon Prime Video** integrated **advertising as standard** in the main subscription and offers an "ad-free" add-on as an opt-in for an **extra charge, hence the higher penetration**
- Since 2024, the share of **Disney+** and **Netflix** subscribers with advertising subscriptions **has almost doubled**


Question: Which type of package do you have for each of these subscriptions?
Source: Simon-Kucher Global Streaming Study 2025, Global n = 12,326 (n = 3,205 with at least 1 self-paid subscription in the countries where ad subscriptions is available)


Acquisitions: While ad-supported packages attract new, more price sensitive subscribers, a large portion of those on ad-supported packages have downgraded

% of global subscribers with ad-supported subscriptions who were newly acquired vs. have switched from an existing subscription

Paid subscribers with available ad package



 **Cannibalization:** "I had a more expensive subscription with this provider and switched to the cheaper basic option with ads"

 **New customers:** "I did not previously subscribe to this provider"

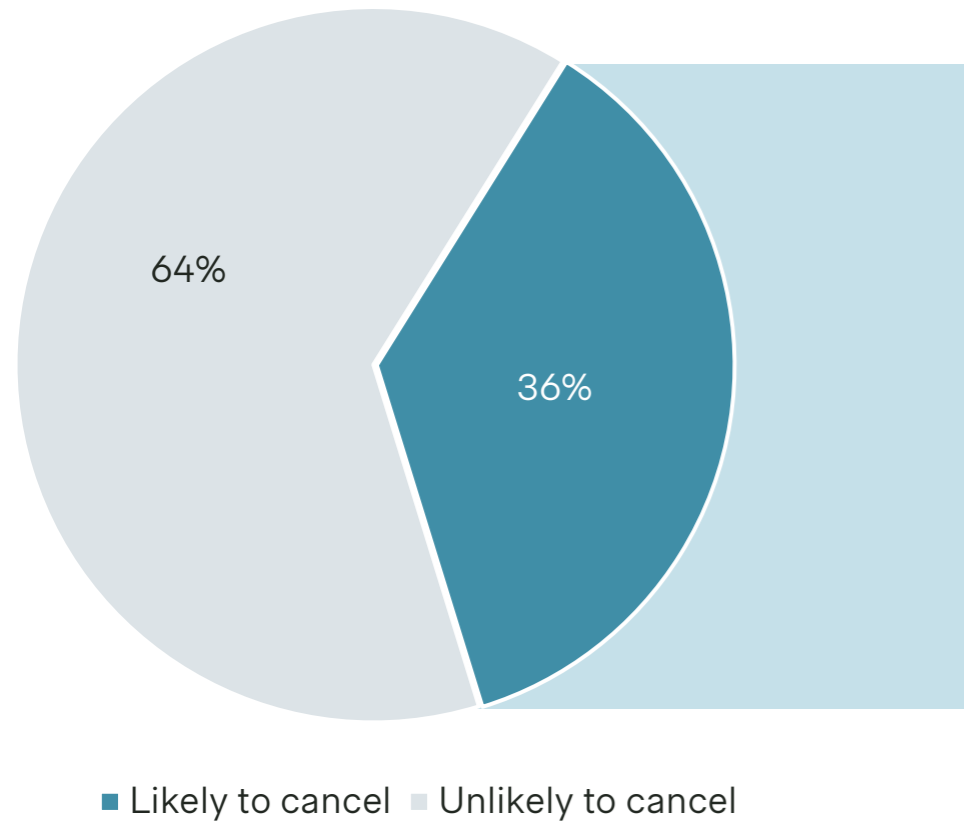
55% of new subscribers in Q1 2025 opted for Netflix's ad-supported package (Netflix quarterly earnings call, April 2025)

- On a global level, **the growth** with advertising packages from new customers for **Netflix has increased** slightly and the **cannibalization effect** has decreased – instead of 54% as in 2024, 60% of subscribers to the advertising subscription came to Netflix as new customers this year, while 40% (-6p.p.) downgraded from a more expensive Netflix subscription.
- For **Disney+**, on the other hand, **the net effect** globally has become **more negative** than last year – 42% (+6p.p. year-on-year) have switched from their existing Disney subscription to the advertising subscription, and 58% came to the provider as new customers due to the lower price.

Question: What were the reasons you chose a basic subscription with advertising?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 830 for Netflix ad subscribers globally, n = 490 for Disney+ ad subscribers global)

Churn impact: Ad-supported packages remain an effective lever to prevent churn of price sensitive subscribers, even more when advertisements are personalized

Stated intention to cancel within the next 12 months



All respondents

Of those who are likely to cancel (36%):

48% (17% of total)
would be likely to keep their subscription if it was **cheaper** but contained **advertising**

8% (3% of total)
would only keep their subscription if the **advertising was personalized** and **relevant** for them

3% (1% of total)
already have a cheaper subscription that contains advertising

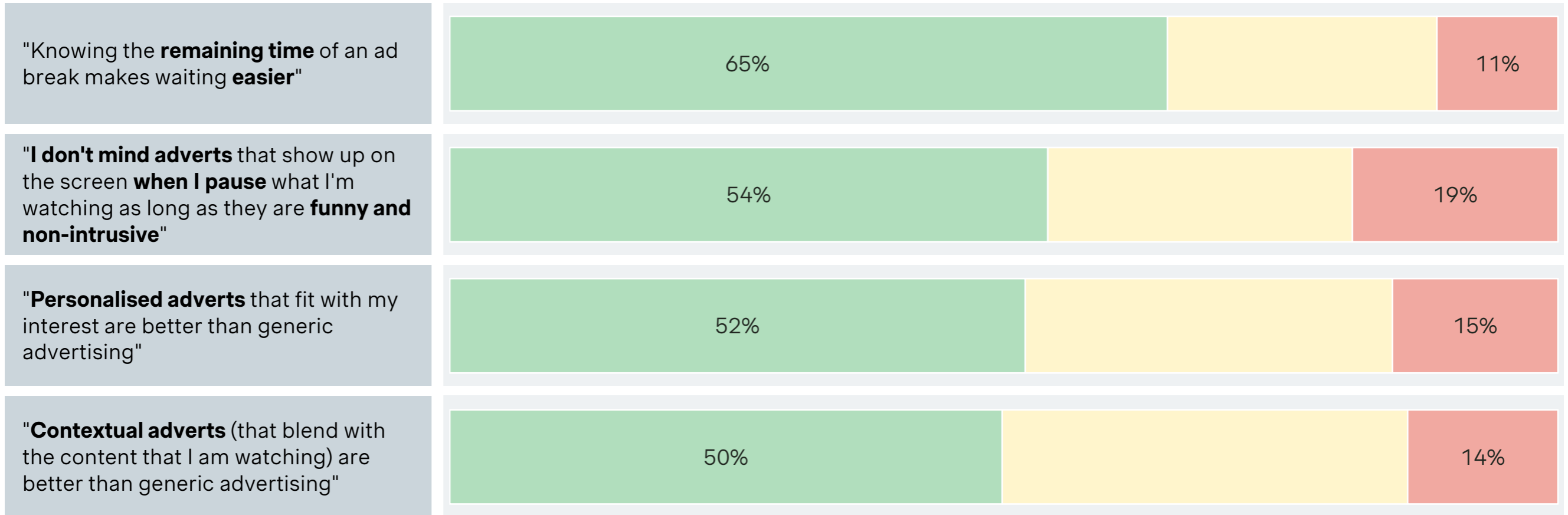
Very few potential churners already have an ad-financed subscription. Almost half of the potential churners could be retained by a cheaper ad-financed subscription, although the majority does not care whether the advertising is personalized. However, from a marketing perspective, personalized advertising is much better for monetization.

Question I: How likely are you to cancel each of your subscriptions within the next 12 months? Question II: How likely would you be to keep the subscription at a lower price, with adverts? Question III: How likely would you be to keep the subscription at a lower price, with highly relevant adverts?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Design of advertising packages: To make ad-financed packages more attractive to users, a display of the remaining advertising time can be particularly effective

Approval of statements relating to the design of advertising (% of respondents)

Paid subscribers with available ad package



Agree Neutral Not agree

Displaying **the remaining advertising time** makes it by far the easiest way for streamers to watch advertising.

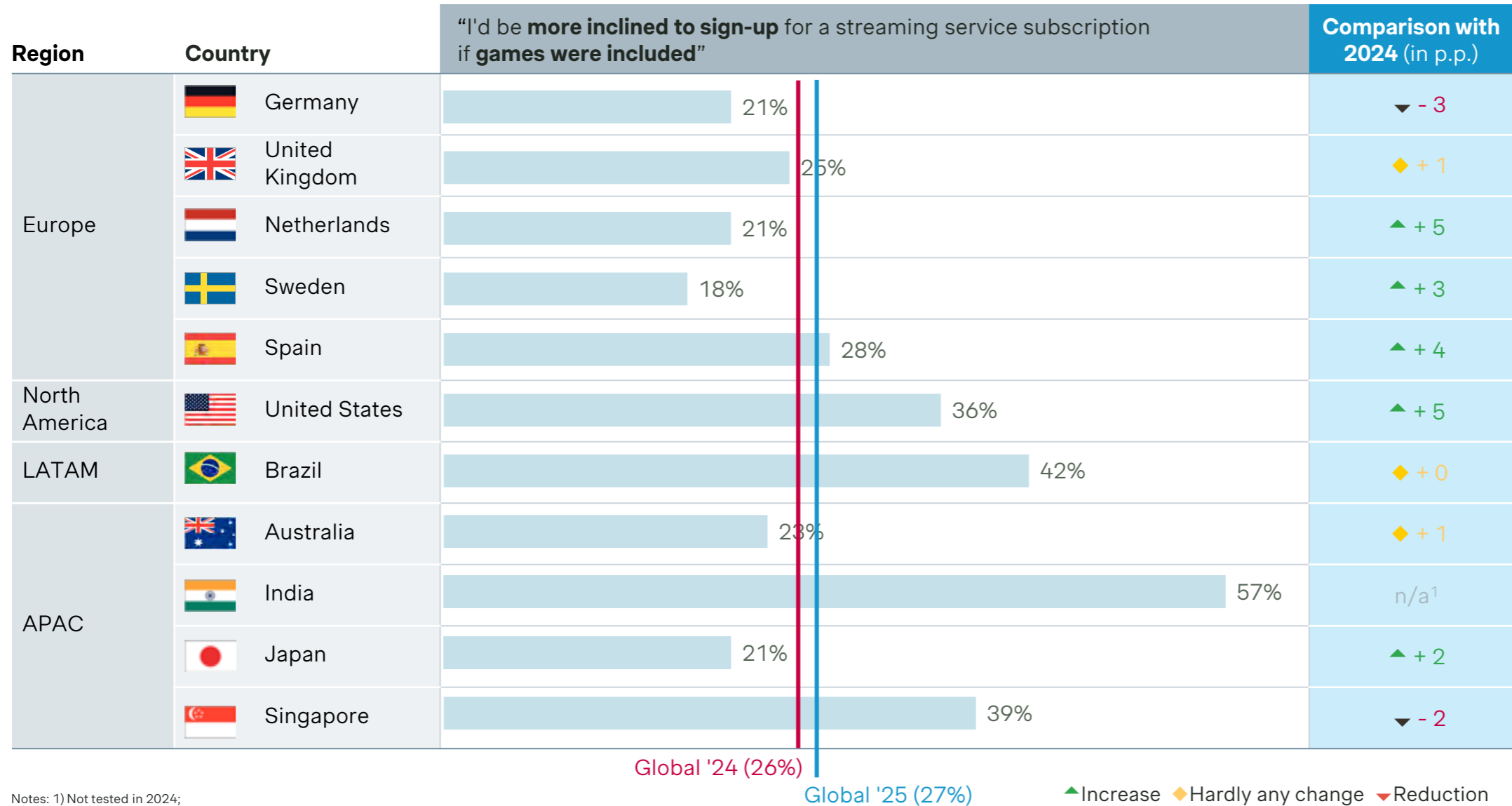
Question: When it comes to advertising, to what extent do you agree with the statements below?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Gaming interest: Interest in gaming varies significantly among countries - India showing the highest and Sweden the lowest interest



All respondents

Interest in gaming and streaming service with games included



In Sweden, the Netherlands, Japan and Germany, the integration of gaming has the least effect as a driver of subscriptions, with Germany leading the biggest decrease since 2024

The Netherlands, United States and Spain are recording the highest increase since 2024

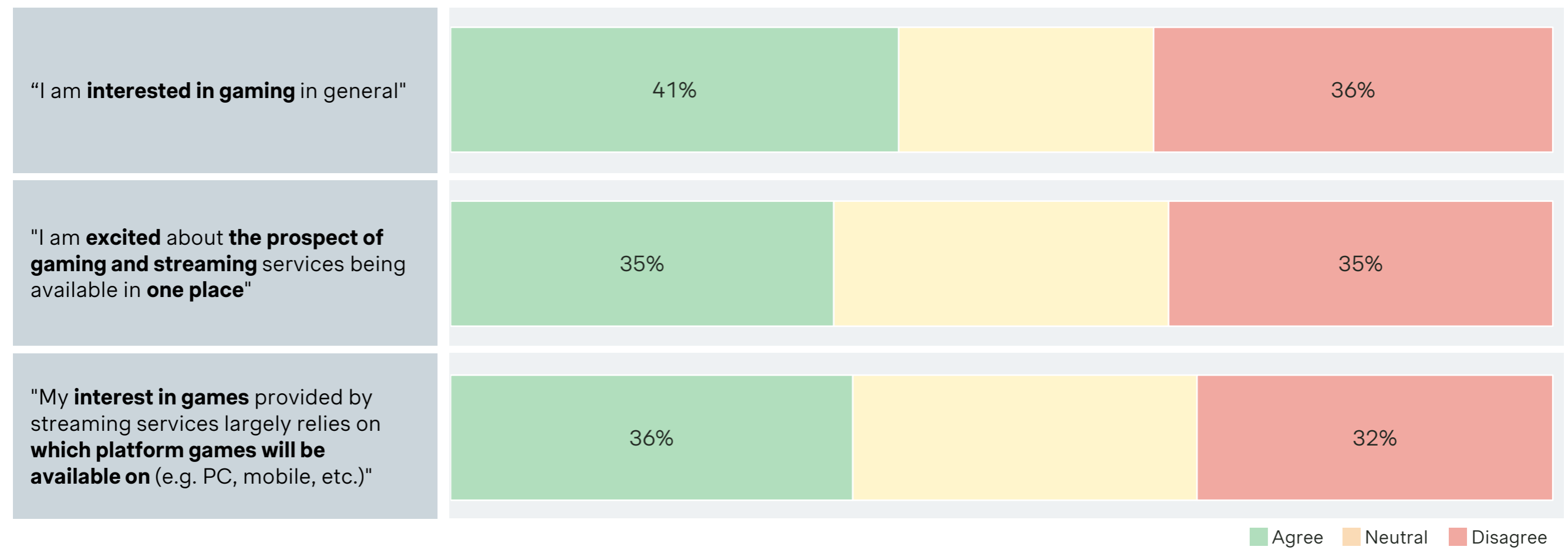
India, Singapore and Brazil have the highest rate of respondents who would be more likely to subscribe if gaming was integrated

Notes: 1) Not tested in 2024;
 Global avg '25 estimated excluding India to compare against the available countries in 2024
 Question: Some streaming services are now venturing into the video games industry. To what extent do you agree with the following statements?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326
 Simon-Kucher | The Global Streaming Study 2025

Gaming as added value: Over a third of streamers show interest in integrating gaming into the streaming experience, although the same share prefer not having it

All respondents

Agreement with statements relating to gaming (% of respondents)

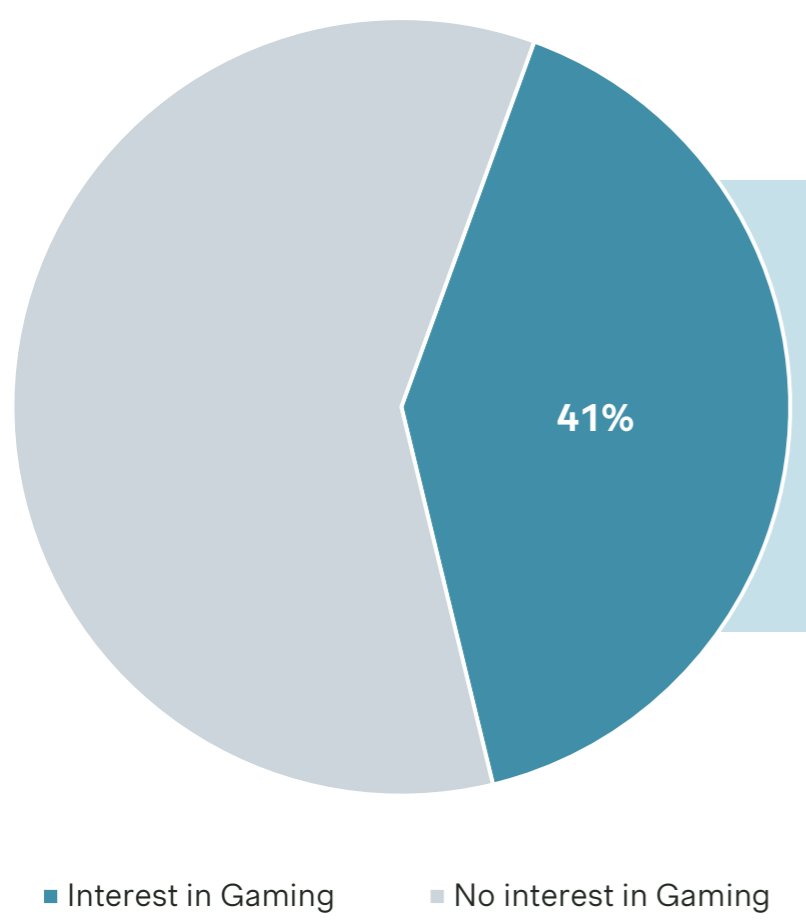


Gaming integration shows mixed appeal. Platform support is key to attract fans while staying unobtrusive for others. Gaming, if at all available, shouldn't be intrusive to avoid making it a *killer* for those streamers who don't agree on having gaming available.

Question: Some streaming services are now venturing into the video games industry. To what extent do you agree with the following statements?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

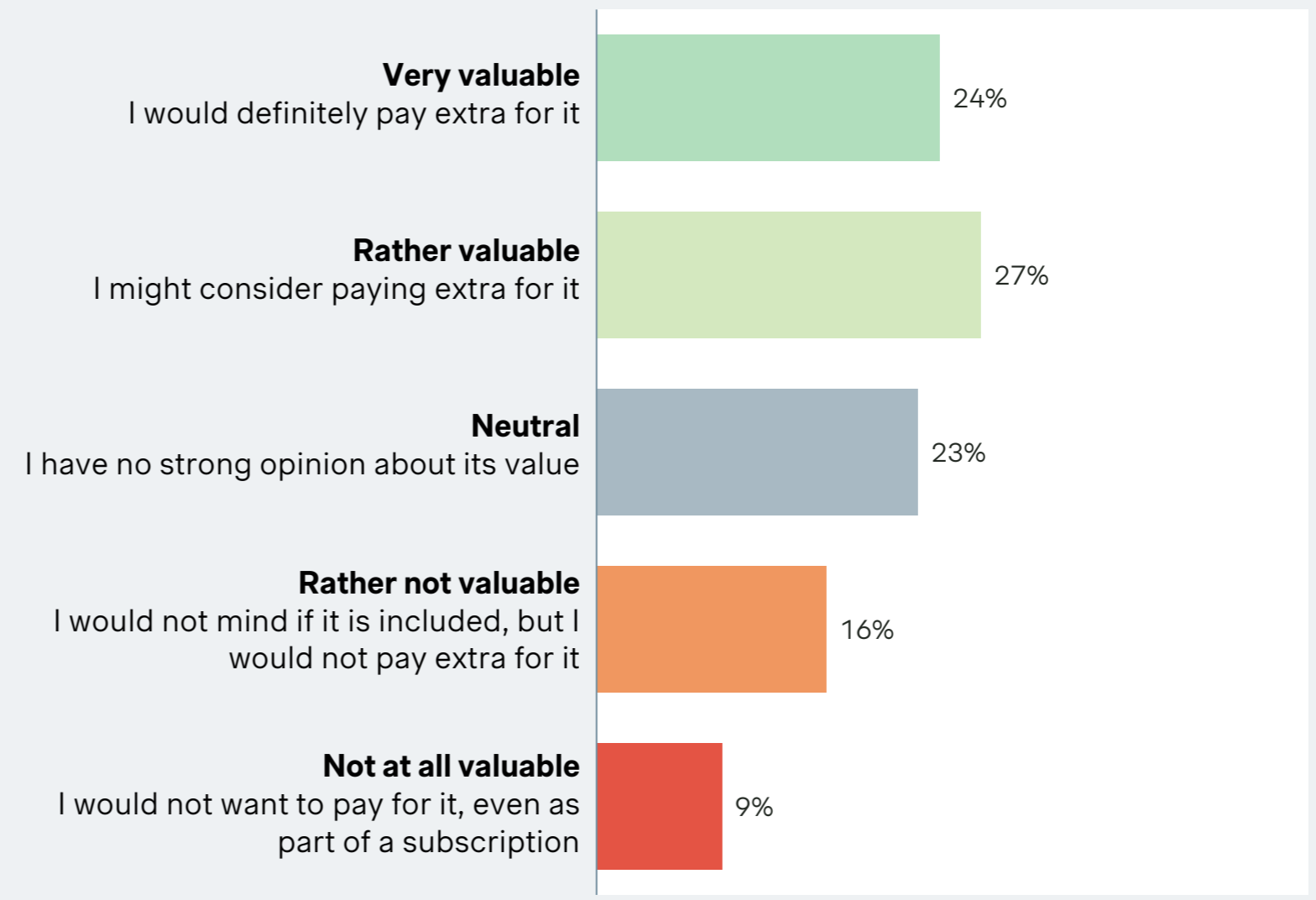
Value of gaming: Many streamers who are interested in gaming would value gaming as a feature as part of a streaming subscription

% of respondents who are interested in gaming



Value of gaming as a feature in the streaming subscription
(% of respondents interested in gaming content)

All respondents



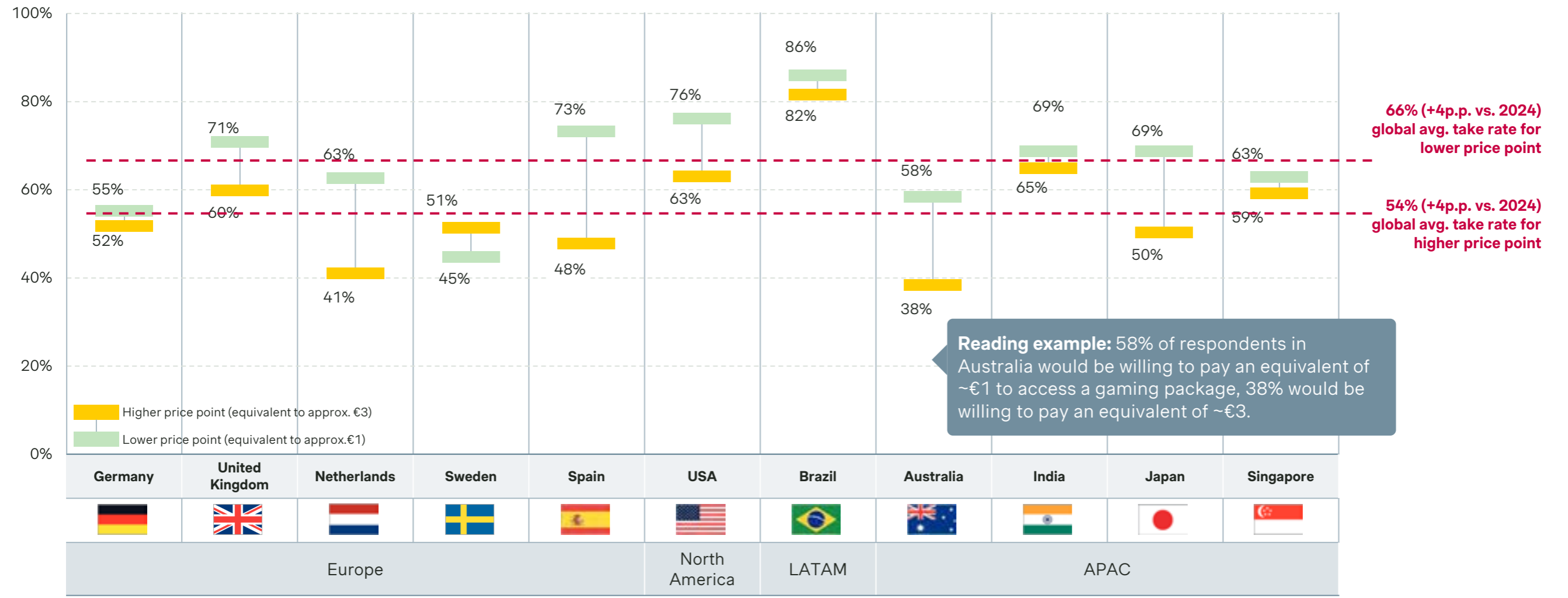
Question I: Some streaming services are now venturing into the video games industry. To what extent do you agree with the following statements? Question II: In your opinion, how valuable is gaming as a feature in a streaming subscription?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Gaming willingness-to-pay: Amongst those interested in gaming, around 60% are willing to pay for them an additional 1 ~ 3 EUR/USD



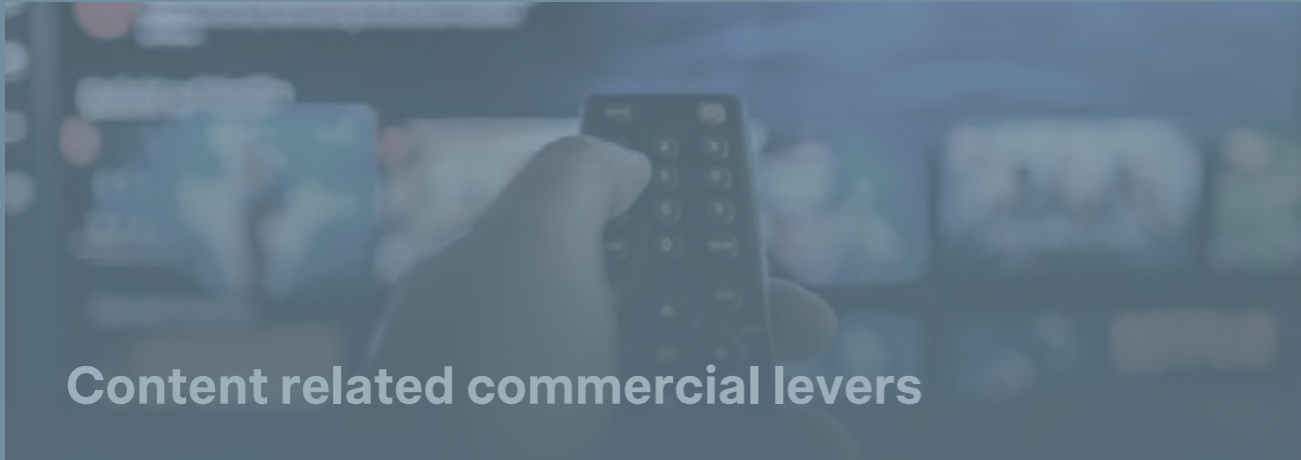
Additional willingness-to-pay for a 'gaming package' add-on

Respondents with an interest in gaming



Notes: Global avg '25 estimated excluding India to compare against the available countries in 2024
 Question: Imagine that you subscribe to a streaming service, and they introduce a 'games package' where you can access various mobile games across a wide variety of content genres and game style. Would you be willing to pay [value in local currency] per month, in addition to your current subscription, to access the games package?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 5,305 for those interested in gaming)
 Simon-Kucher | The Global Streaming Study 2025

Commercial levers: To create more differentiation and attract a new generation of streamers, streaming providers could explore several levers for their proposition

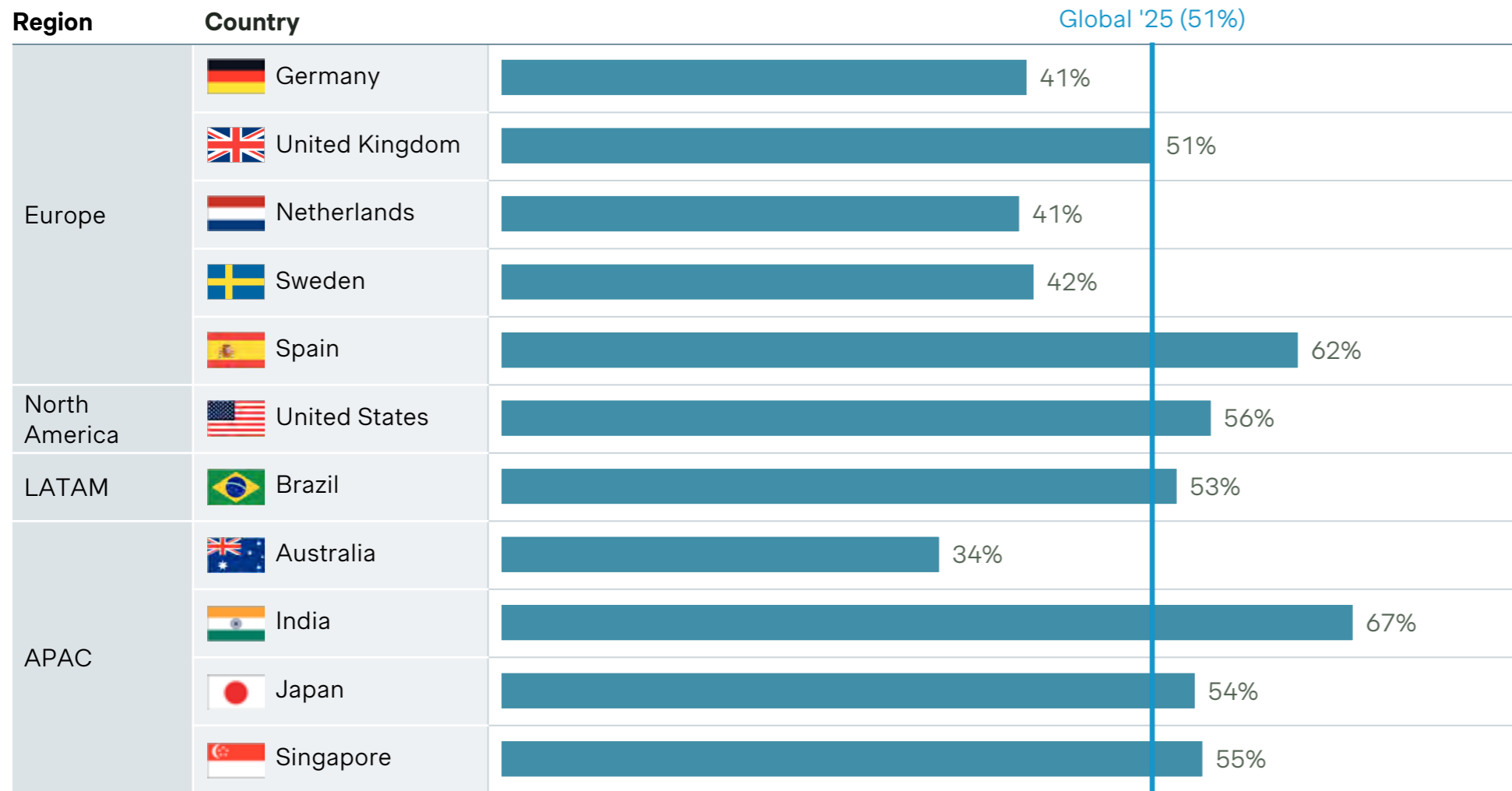


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- 07 **Annual subscriptions** for customer loyalty

Superbundles: Around half of all streamers with a paid subscription have at least one streaming subscription as part of a package

% of respondents with paid subscriptions who have subscribed to at least one streaming service together as part of a package



Paid subscribers

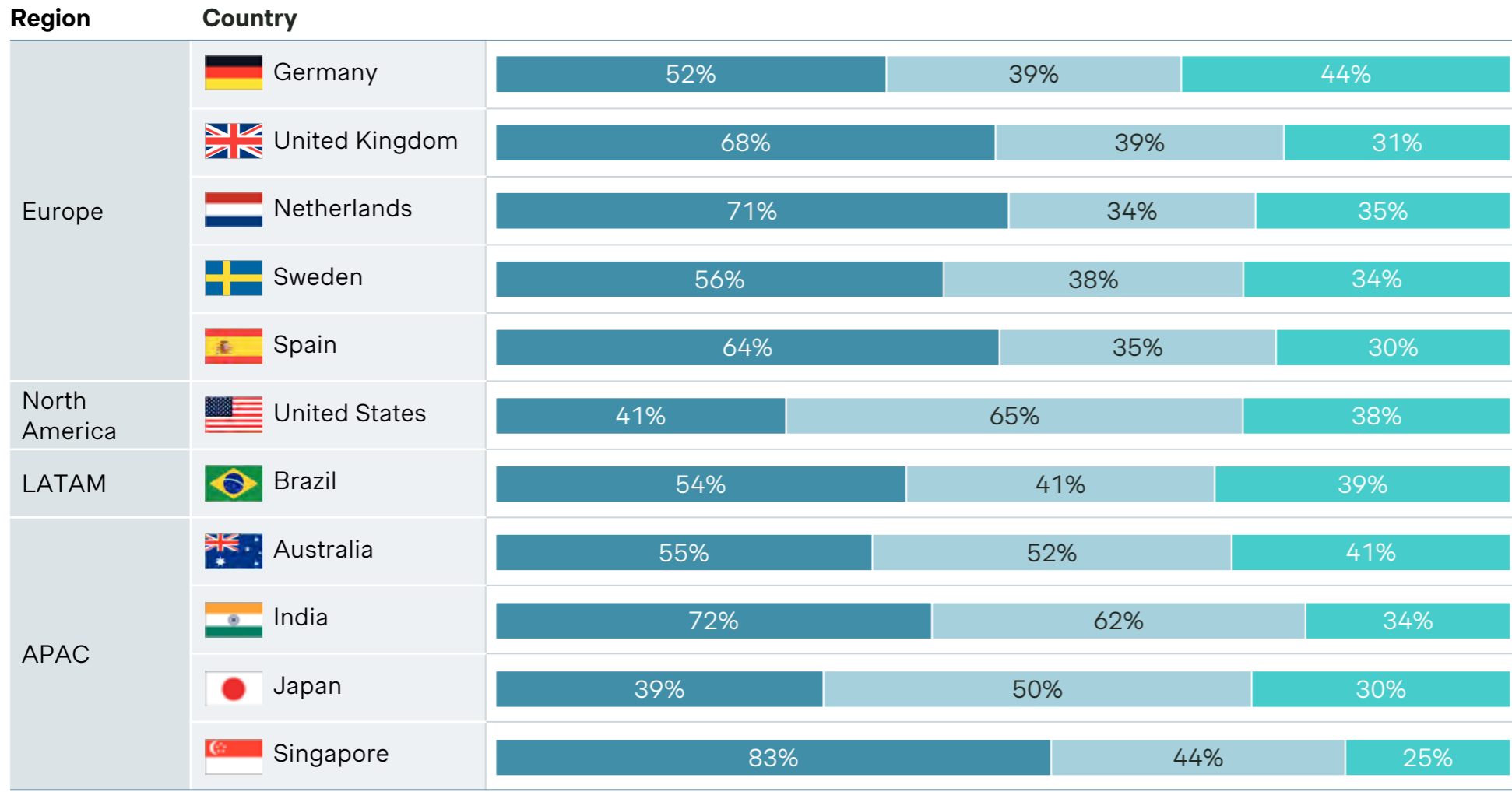
- Superbundles **already dominate** the streaming market **in seven** markets: **United Kingdom, Spain, USA, Brazil, India, Japan** and **Singapore** – in these markets, more than half of all streamers with a paid subscription have already subscribed to at least one streaming service as part of a package
- When it comes to **streaming superbundles, India and Spain** are the **leading markets**, while Australia is behind all other markets
- In **Australia**, up to **one in three streamers** with a paid subscription has subscribed to a **streaming service as part of a package**

Question: Which of the following subscriptions that you pay for do you purchase together as part of a streaming package, deal, or offer?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 7,242 with at least 1 self-paid subscription)

Telco-led bundling dominance: Telco superbundles are the most common type among users with bundles, except in the United States and Japan



Paid subscribers with at least one superbundle



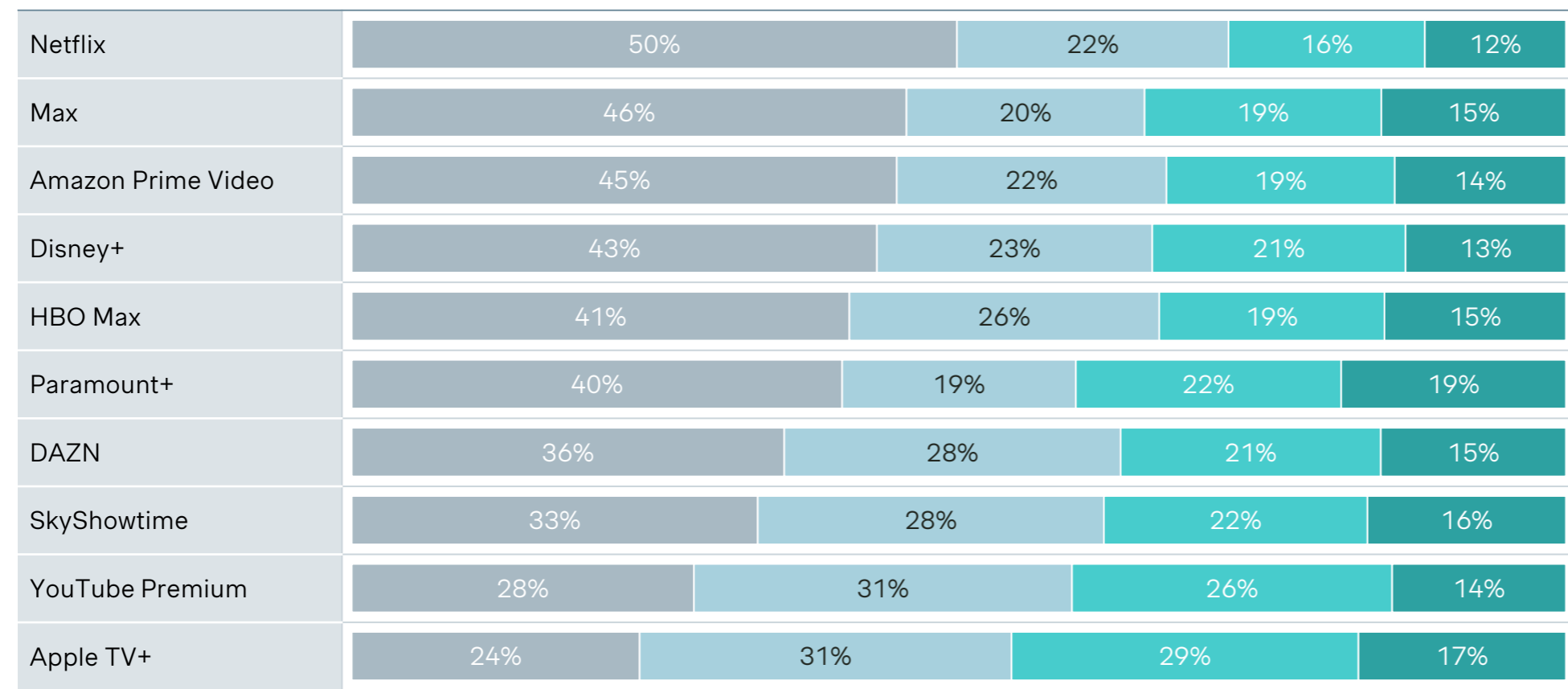
■ Together with your regular TV/internet/mobile provider (e.g. Netflix + your local TV or broadband provider)
■ Together in a package with streaming subscriptions (e.g. Disney + Hulu, Prime + Netflix)
■ Together with other services

- Bundles with **different streaming subscriptions is also popular**, led by **United States and Japan** (50% or over)
- **India and Singapore** users with at least one bundle have the **biggest number of different bundles on average** (>1.5 bundles per user)

Question: Which of the following subscriptions that you pay for do you purchase together as part of a streaming package, deal, or offer?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 3,742 with at least 1 self-paid subscription and at least 1 superbundle)

Players who dominate the market have the highest share of streamers in standalone packages

Type of subscription from selected providers¹
(% of respondents with paid subscriptions)



Deep Dive analysis at country level can be delivered upon request

- Standalone (not in the package)
- Super bundle with TV/Internet/mobile phone provider
- Superbundle with other streaming services
- Superbundle with other services

Paid subscribers

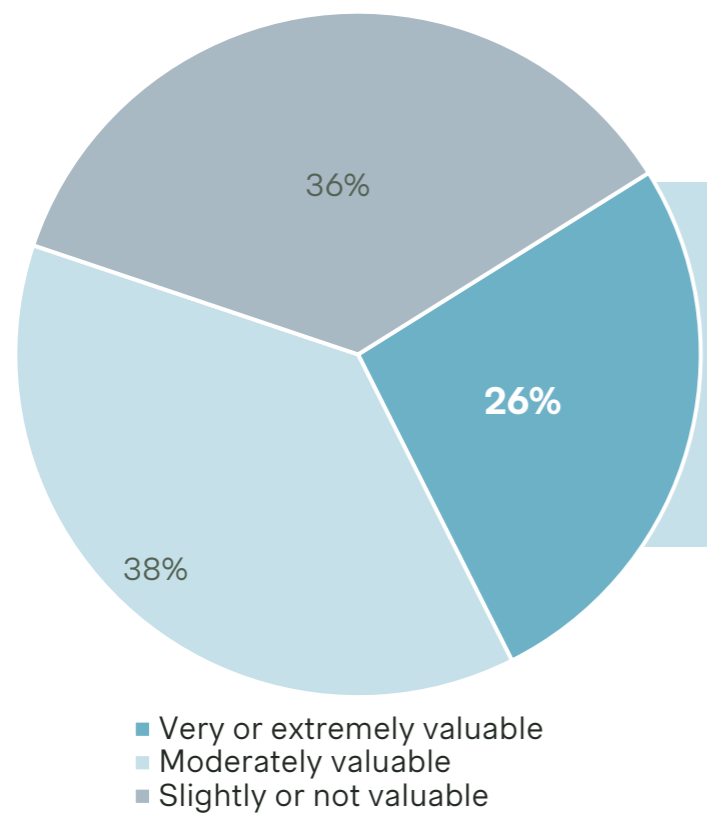
- **Relevance of superbundles** varies greatly **between** providers
- **The proportion of standalone subscriptions** that are not subscribed to in the package are between **24-50%**, **depending on the provider**
- At **Netflix half** of the streaming subscriptions were subscribed to as a **single product**
- With **all other streaming providers, more than every second subscription is already part of a package** with other streaming services or services

Notes: 1) Providers selected based on number of countries it appears within Global Streaming Study (>=3)
 Question: Which of the following subscriptions that you pay for do you purchase together as part of a streaming package, deal, or offer?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 7,242 with at least 1 self-paid subscription)
 Simon-Kucher | The Global Streaming Study 2025



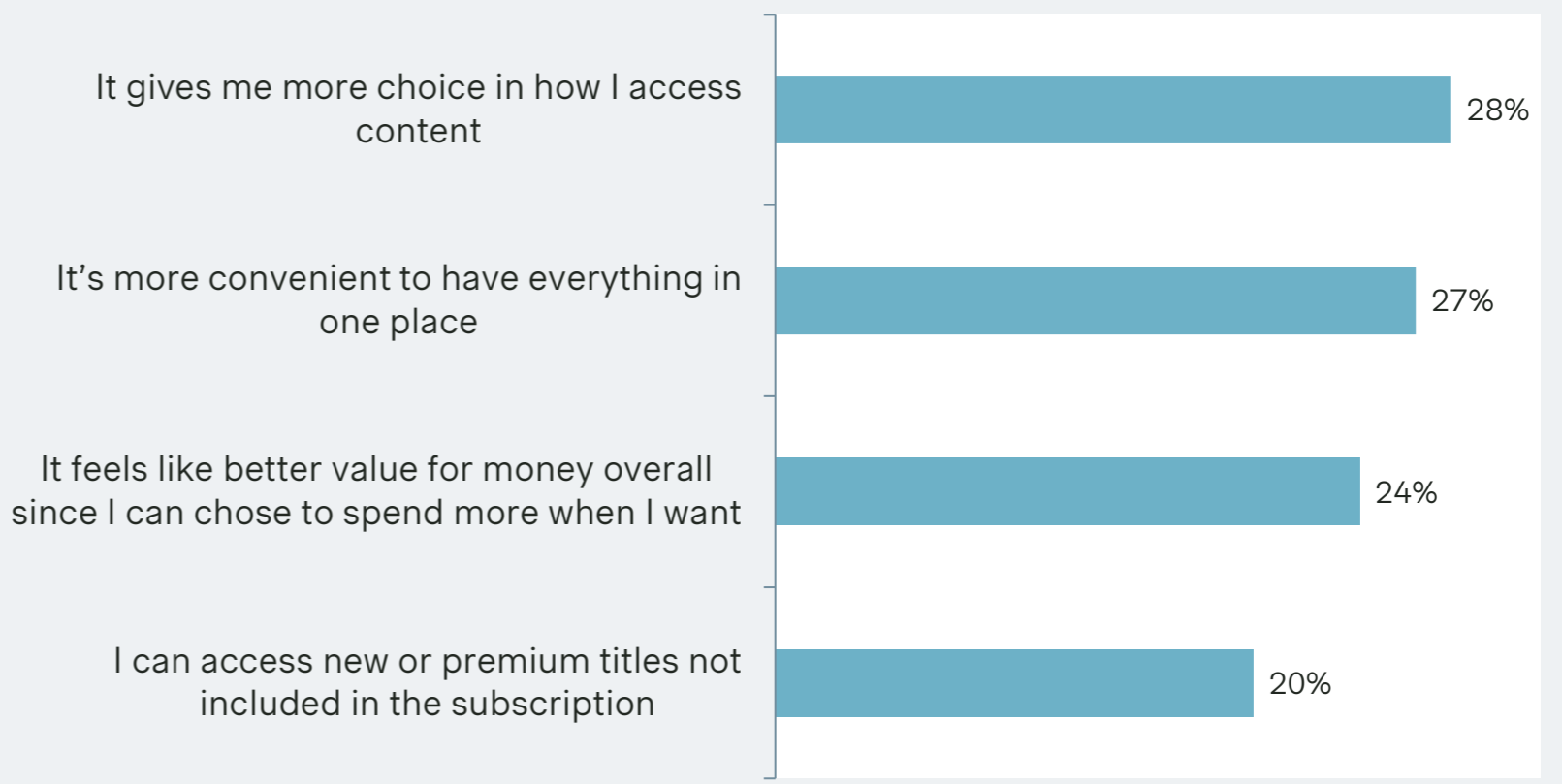
Buying or renting option: Buying or renting individual titles in addition to the subscription is very valuable for 26% of global streamers mainly due to more choices

Value assessment of offering both: Access to content through a subscription and the option to buy or rent individual titles on top (% of respondents)



Reasons for finding the option to buy or rent individual titles on top to the subscription very or extremely valuable (% of respondents)

All respondents

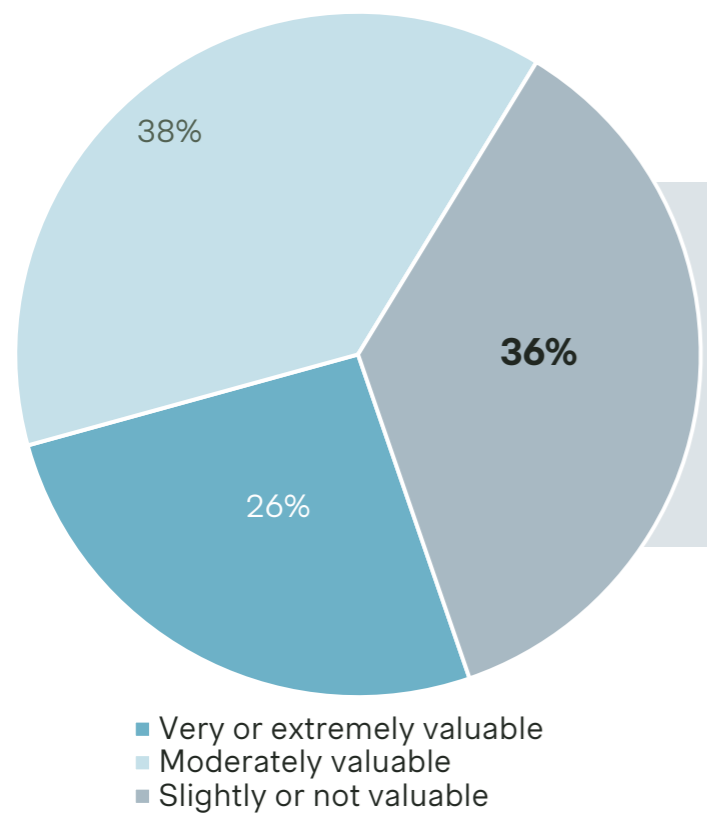


More than every second global streamer find the option to rent or buy individual titles in addition to the subscription at least moderately attractive. When introducing this additional option, streaming providers need to select very carefully which content is offered as part of the subscription and which is on top to rent or buy for which price level.

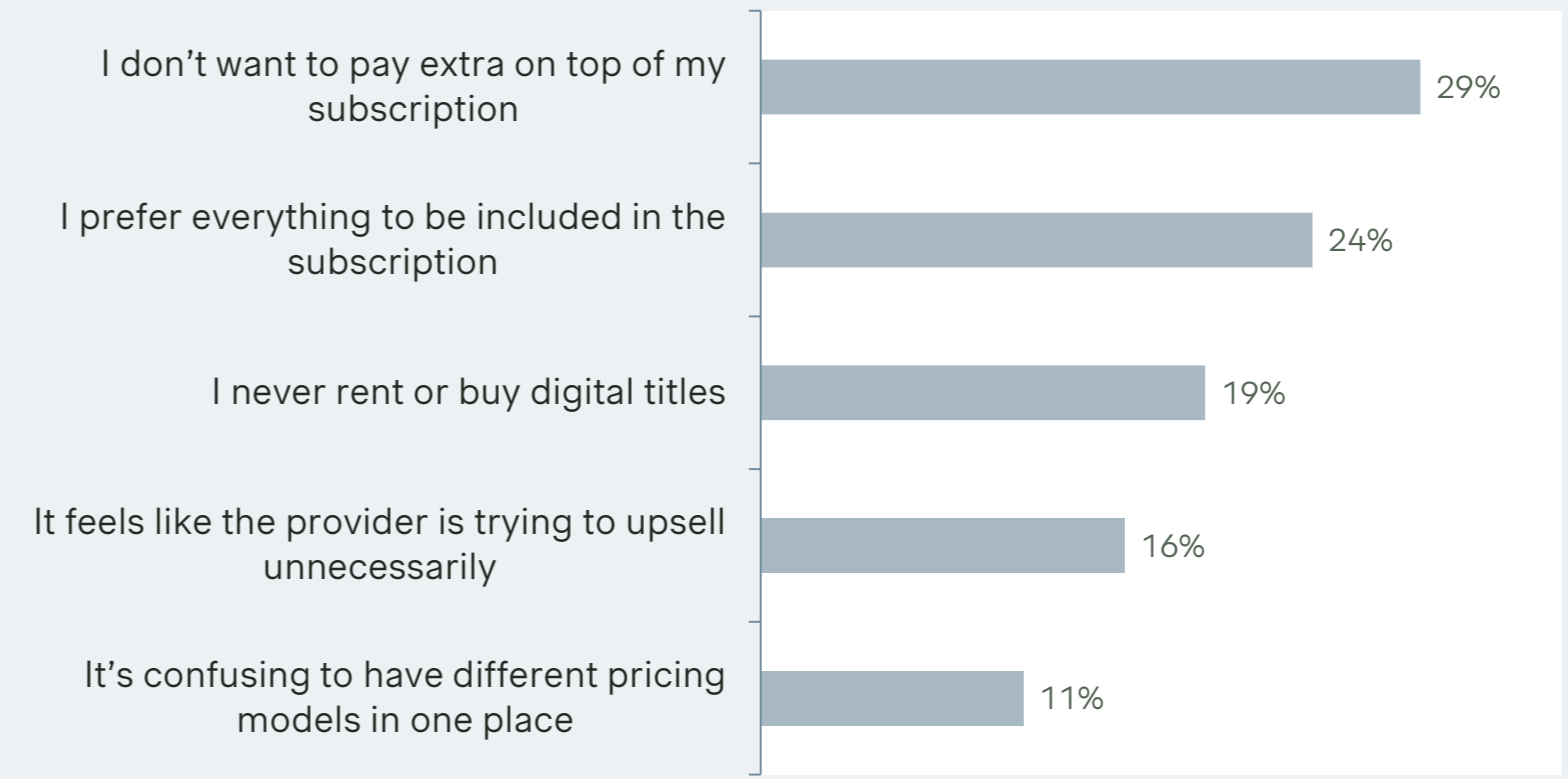
Question: How valuable do you find it when a streaming provider offers both access to content through a subscription and the option to buy or rent individual titles on top? Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Buying or renting option: Buying or renting individual titles in addition to the subscription is not valuable for 36% of global streamers as they don't want to pay extra

Value assessment of offering both: Access to content through a subscription and the option to buy or rent individual titles on top (% of respondents)



Reasons for finding the option to buy or rent individual titles on top to the subscription slightly or not valuable (% of respondents) **All respondents**

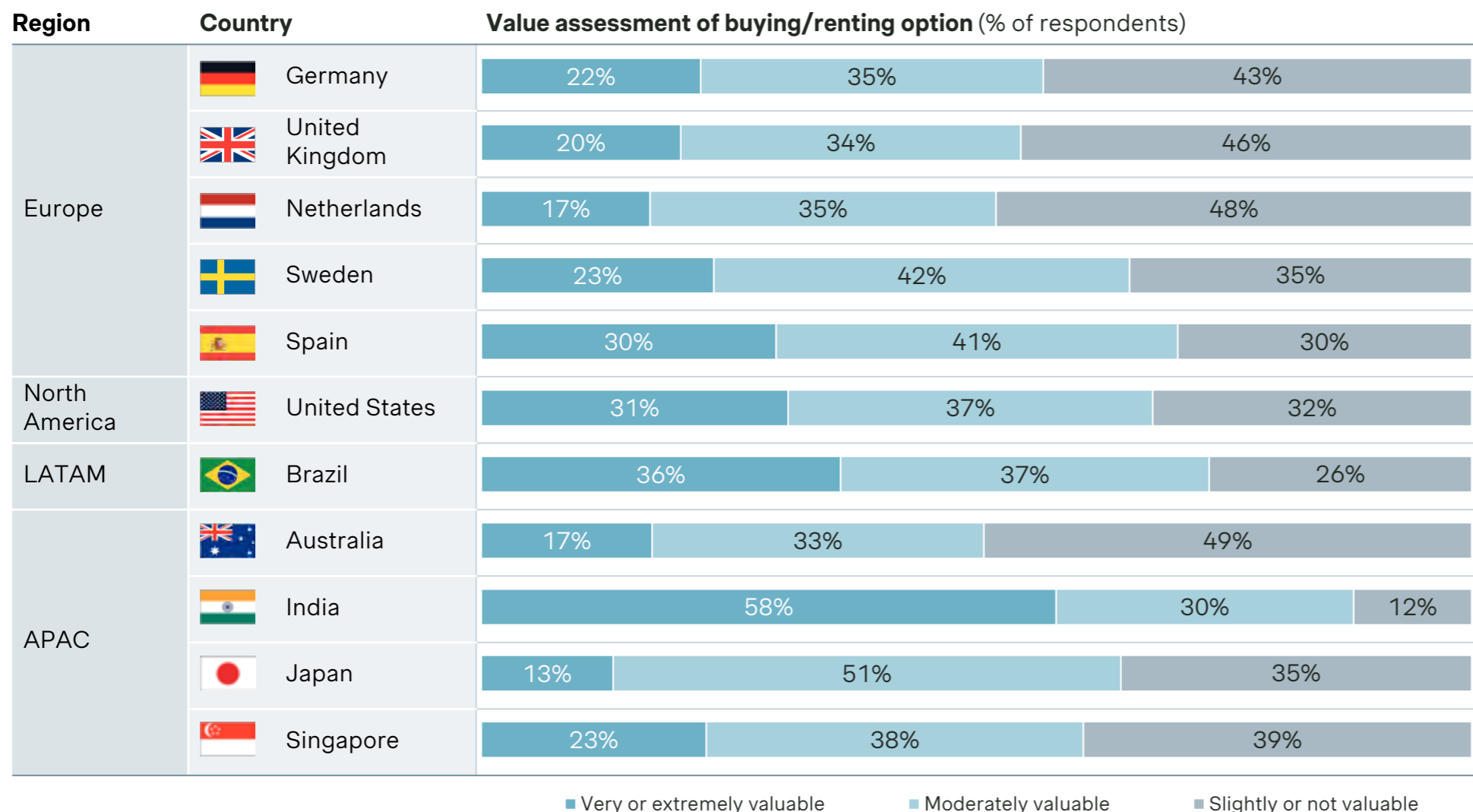


Streaming providers also need to be careful when offering this option, as many streamers prefer to have everything included in their subscription or don't want to pay extra on top.

Question: How valuable do you find it when a streaming provider offers both access to content through a subscription and the option to buy or rent individual titles on top?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Buying or renting option: Offering this option is very attractive in India and Brazil, where many streamers highly value having this option on top

Value assessment of offering both: Access to content through a subscription and the option to buy or rent individual titles on top



All respondents

- Only in **Brazil** and **India** there is a larger number of streamers that **value this option** than streamers that **don't**
- **Australia, Japan** and **Netherlands** value a buying or renting option **the lowest** (<20%)

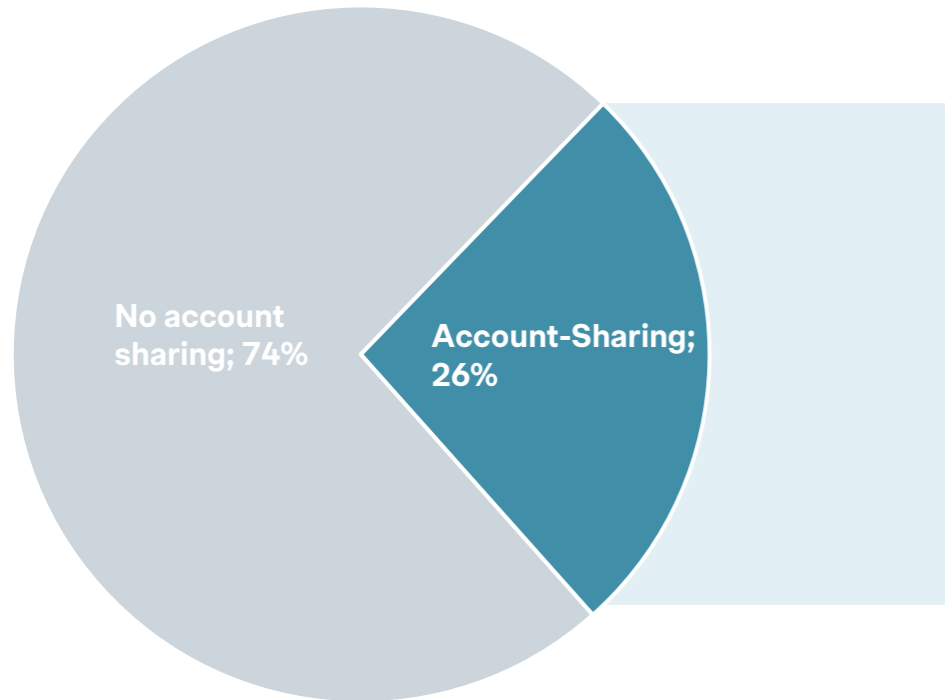
Question: How valuable do you find it when a streaming provider offers both access to content through a subscription and the option to buy or rent individual titles on top?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

All respondents

Account sharing seems to have stabilized – The past restrictions imposed by providers on previous years seem to have driven an early impact, but momentum has faded

Global % of streamers who use a subscription paid for by someone they don't live with ...

... by country



Continental	Country	% of respondents who share a third-party account	Change compared with 2024 (in p.p.)
Europe	Germany	20%	◆ +1
	United Kingdom	19%	◆ -1
	Netherlands	30%	◆ -1
	Sweden	26%	◆ -1
	Spain	27%	▲ +2
North America	USA	24%	◆ +1
LATAM	Brazil	34%	◆ 0
APAC	Australia	24%	◆ -1
	India	39%	n/a ¹
	Japan	21%	▲ +3
	Singapore	24%	▼ -6

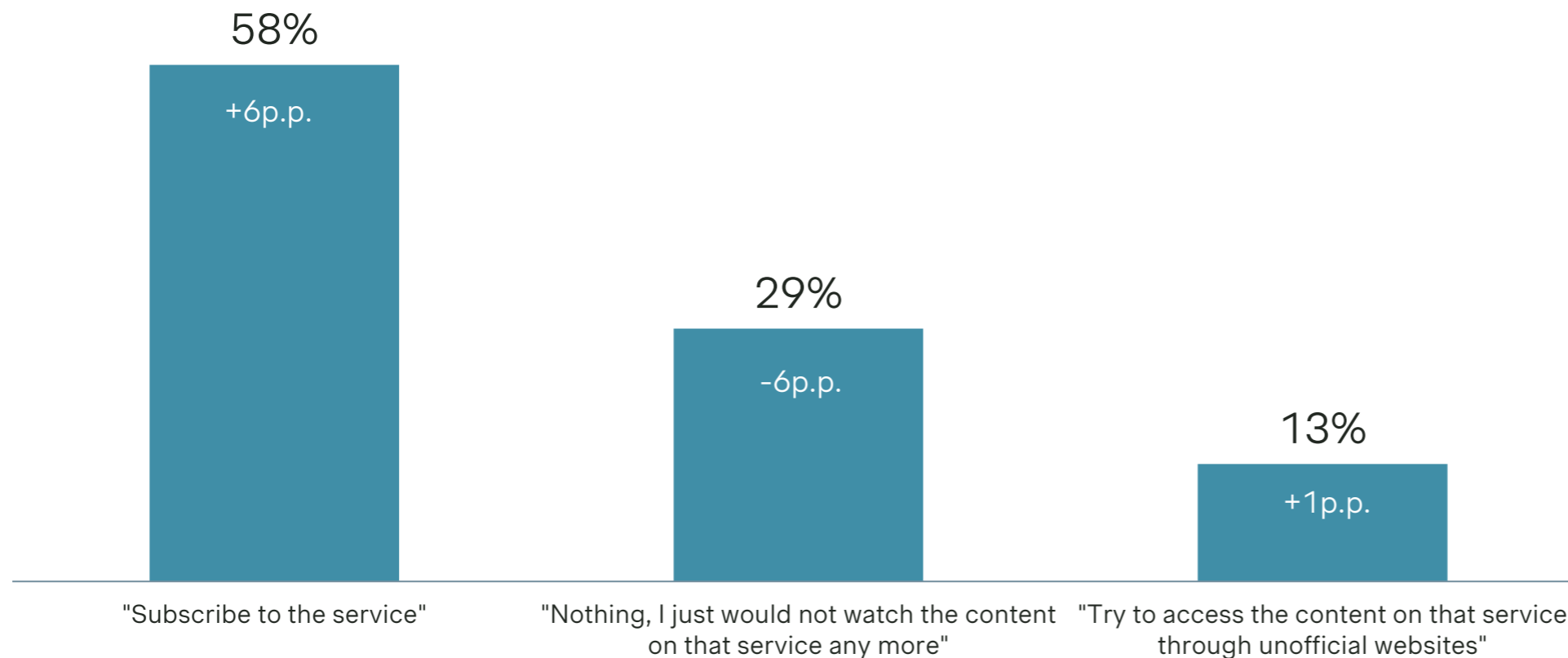
▲ Increase ◆ Hardly any change ▼ Reduction

- In **almost all countries**, the proportion of **streamers** who share a **non-household subscription** but do not pay for it themselves **has stabilized** (Japan, Spain and **Singapore** are the only exceptions, the latter being the **only country with a significant decrease**).
- **The UK has the lowest share of account co-users**, along with **Germany** and **Japan**.

Notes: 1) Not tested in Streaming Study 2024
Question: Do you currently use any streaming subscriptions which are paid for by someone you do not live with?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

The restrictions are contributing to subscriber growth – streamers are accepting more and more the restriction on shared accounts

Reaction of account co-users in the event of a restriction of account sharing (incl. comparison to 2024)



Countries tested in 2024 & 2025

- Almost **30%** (6p.p. less than in the previous year) would no longer watch the content of the streaming service if there were a restriction
- The proportion that would try to access the streaming service's content **via unofficial websites has residually increased by 1p.p.**

Question: Imagine that you no longer have access to the subscription paid for by someone who does not live with you. What would you probably do?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 3,395 current account co-users who do not pay for subscriptions themselves)

Deep-dive: Globally, the proportion of account co-users who would subscribe themselves in the event of an account sharing restriction has increased by 6p.p.

Reaction of account co-users in the event of a restriction of account sharing (incl. comparison to 2024)

Region	Country	% of current account co-users	Change "self-subscribe" to 2024 (in p.p.)
Europe	Germany	58%	+ 11
	United Kingdom	50%	- 6
	Netherlands	58%	+ 2
	Sweden	61%	+ 13
	Spain	52%	+ 12
North America	United States	58%	+ 5
LATAM	Brazil	75%	+ 7
APAC	Australia	54%	+ 14
	India	66%	n/a ¹
	Japan	61%	+ 14
	Singapore	55%	- 15

■ Subscribe to the service yourself
■ Stop using the service
■ Access content through unofficial websites

Ø 58%
 (+6p.p.
 vs. 2024)

▲ Increase
◆ Hardly any change
▼ Reduction

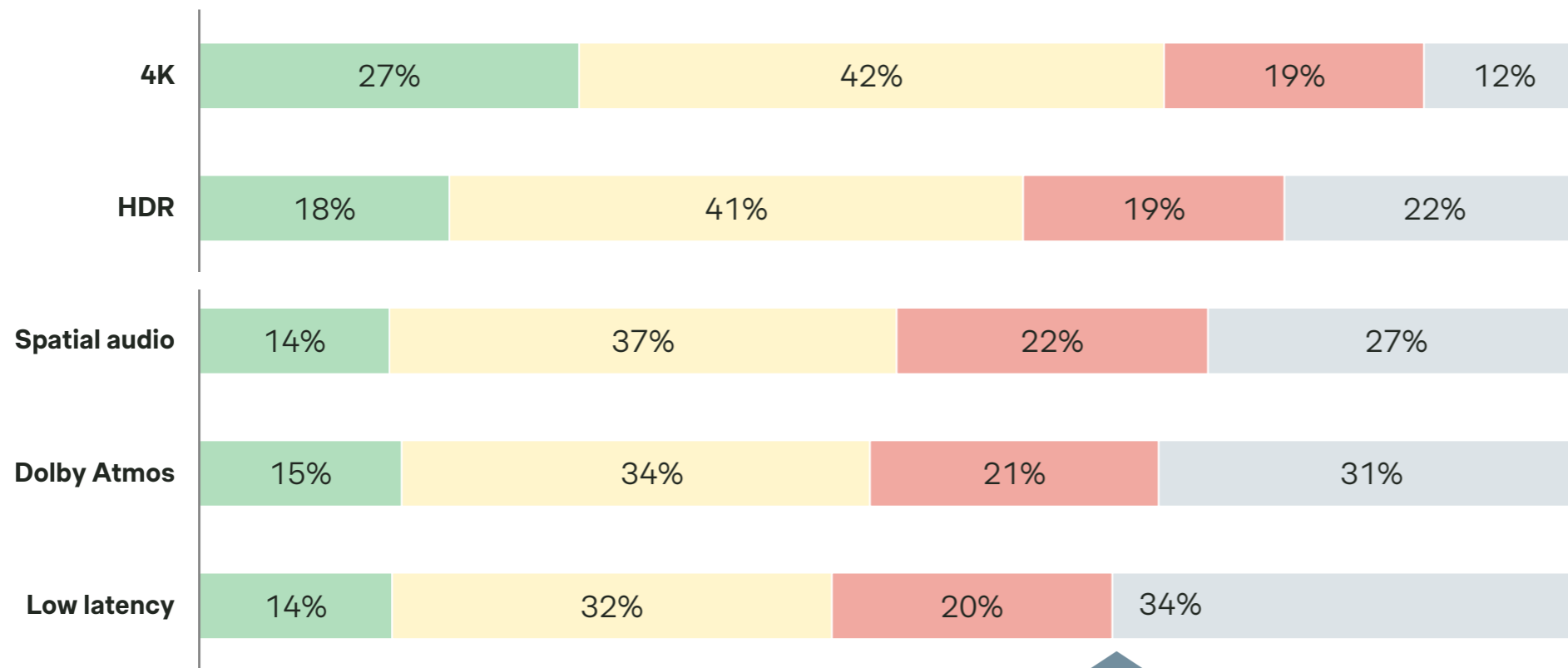
Current account co-users

- Across all countries, **58% of current account co-users would subscribe** to the streaming service themselves if account sharing was no longer possible – this corresponds to an **increase of 6p.p.** compared to 2024
- Brazil, India, Japan and Sweden are the leaders** in their willingness to take out subscriptions, **while Spain and Australia bring up the rear** with just over 50%
- In addition to **Japan and Australia**, the **largest year-on-year increase was recorded by Sweden**

Notes: 1) Not tested in Streaming Study 2024;
 Global avg '25 estimated excluding India to compare against the available countries in 2024
 Question: Imagine that you no longer have access to the subscription paid for by someone who does not live with you. What would you probably do?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 3,395 current account co-users who do not pay for subscriptions themselves)
 Simon-Kucher | The Global Streaming Study 2025

Due to their limited relevance, audio and video quality features are only suitable to a limited extent as differentiators between packages or providers

Awareness and relevance of audio and video quality features (% of respondents)



After explaining the importance of latency, 30% of previously ignorant respondents rate low latency as an interesting feature

■ Aware and important (must have) ■ Aware and slightly important (nice to have) ■ Aware but not important ■ Not aware

Question: Streaming providers are currently working on improving overall video and audio quality. Which of these terms around video and audio quality are you aware of and how important are they for your purchase decision?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

All respondents

- **Audio and video quality features** can be important for specific **use cases** and **user segments** (e.g., low-latency streaming for live events) or **in combination can serve as a differentiator** from the competition (as is currently being used by some vendors)
- However, **the target group** with the high attractiveness of the features is (still) **too small to be used as individual differentiators** from the competition or between offer packages
- In addition, the **awareness** of the features and their **significance** for the streaming experience is still very **limited, so a clear benefit argumentation or explanation is important** when using it to differentiate the offer
- **4K is the most known feature**, with **more than 1 out of 4 users** considering it as a **must have**

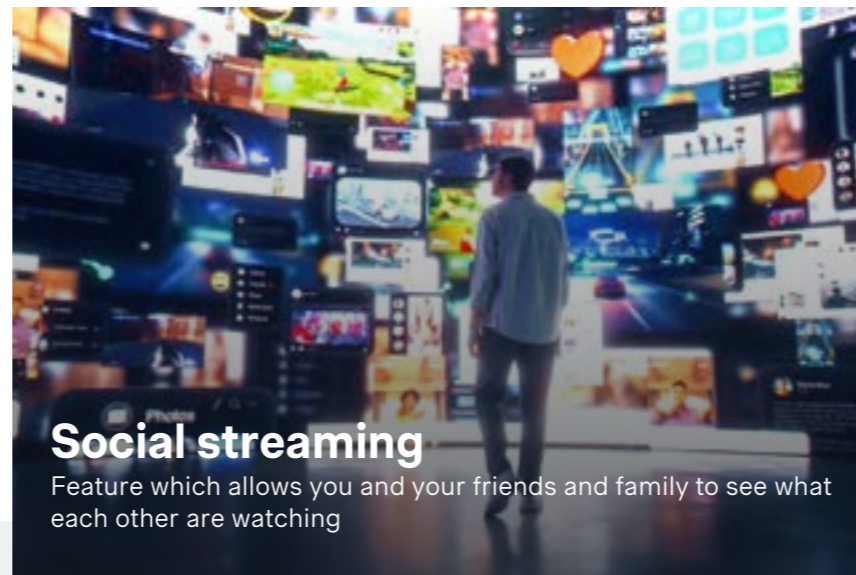
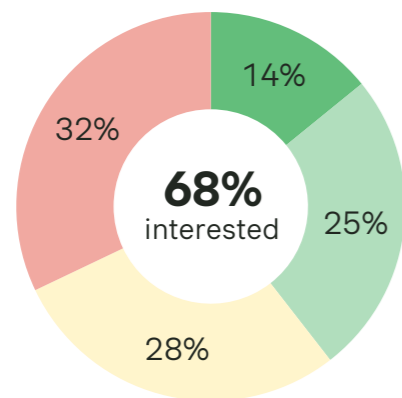
Feature interest: Shared viewing, which allows multiple accounts in different locations to synchronise and play content at the same time leads feature interest

All respondents



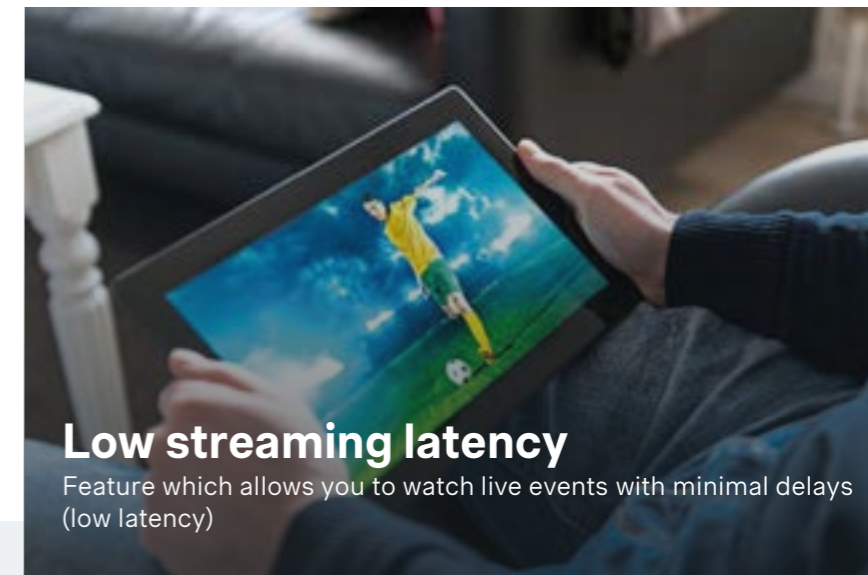
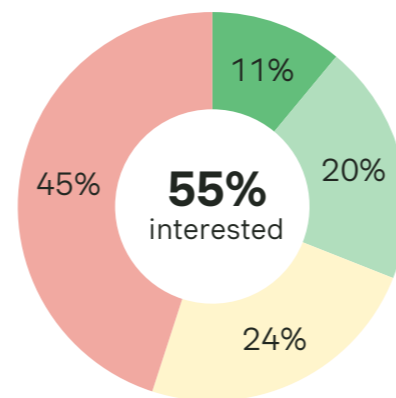
Shared viewing

Feature that allows multiple accounts in different locations to synchronise and play content at the same time



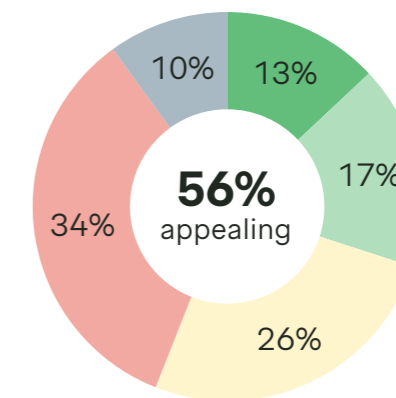
Social streaming

Feature which allows you and your friends and family to see what each other are watching



Low streaming latency

Feature which allows you to watch live events with minimal delays (low latency)



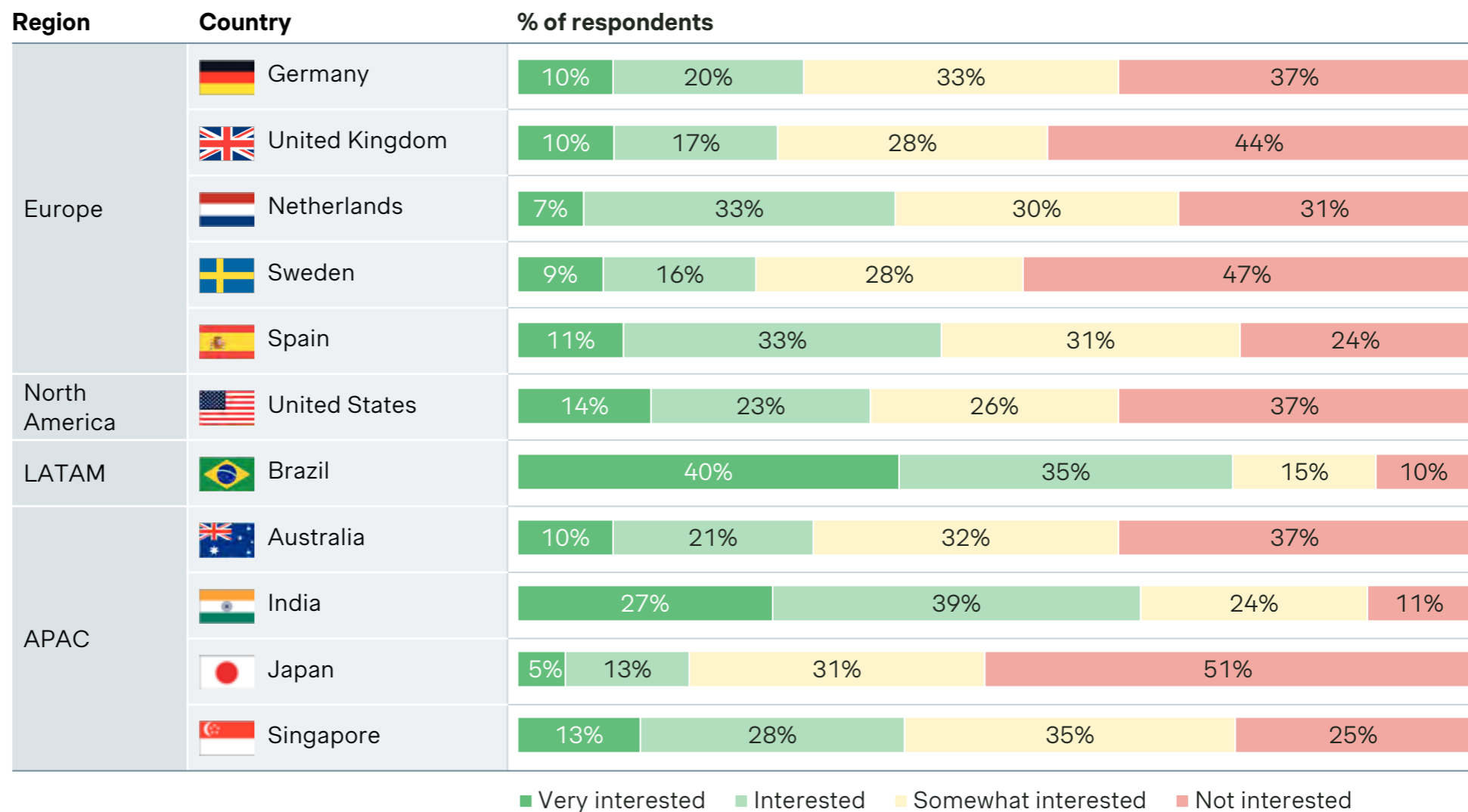
■ Very interested/very appealing
 ■ Interested/appealing
 ■ Somewhat interested/somewhat appealing
 ■ Not interested/not appealing
 ■ I don't know

Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

High potential for shared viewing: Over two-thirds of streamers show interest in synchronized multi-account viewing



All respondents



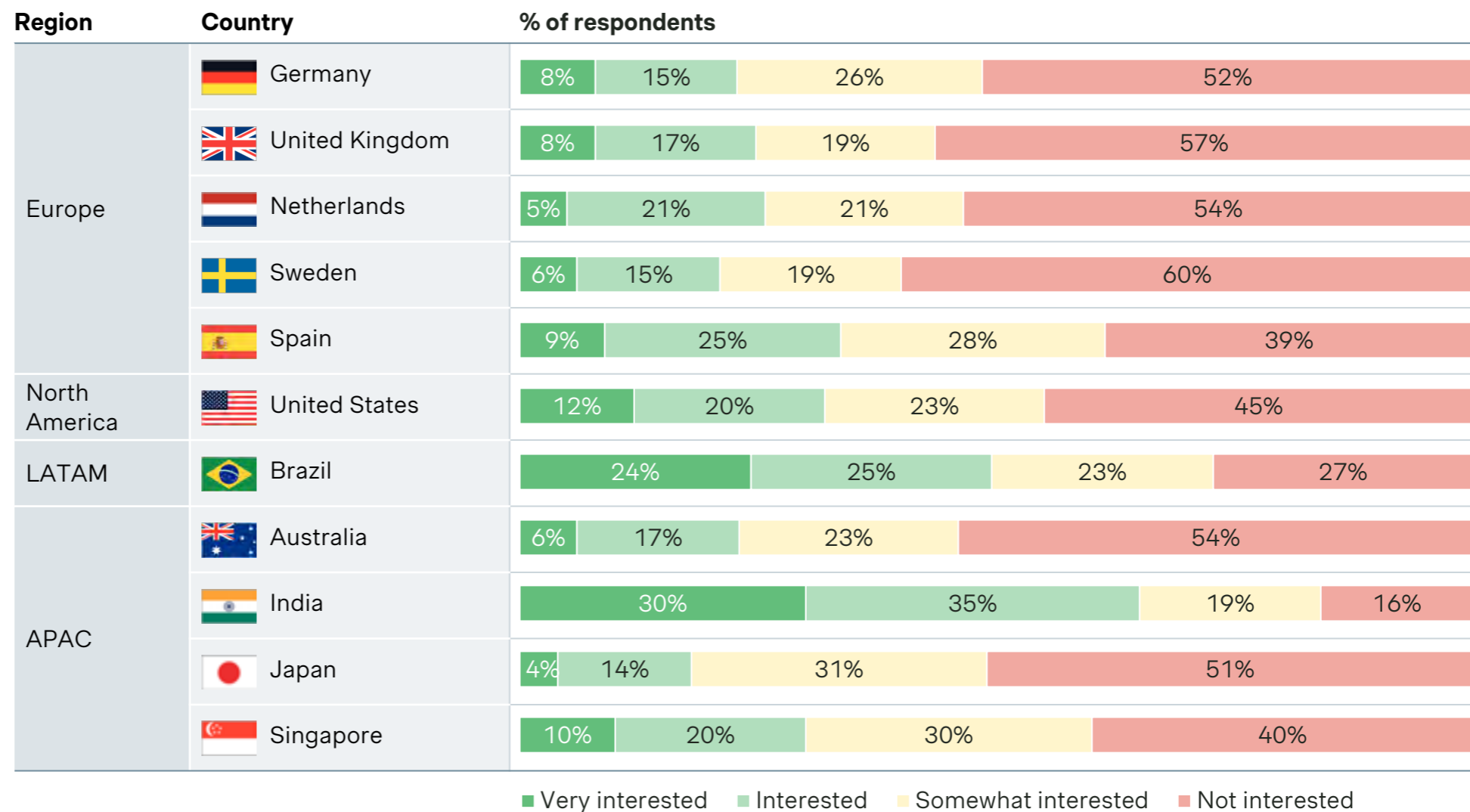
Question: Imagine that streaming services introduced a feature that allows multiple accounts in different locations to synchronise and play content at the same time. How interested would you be in using this feature?

Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Social streaming: 55% of users are interested in seeing what friends and family are watching in real time



All respondents



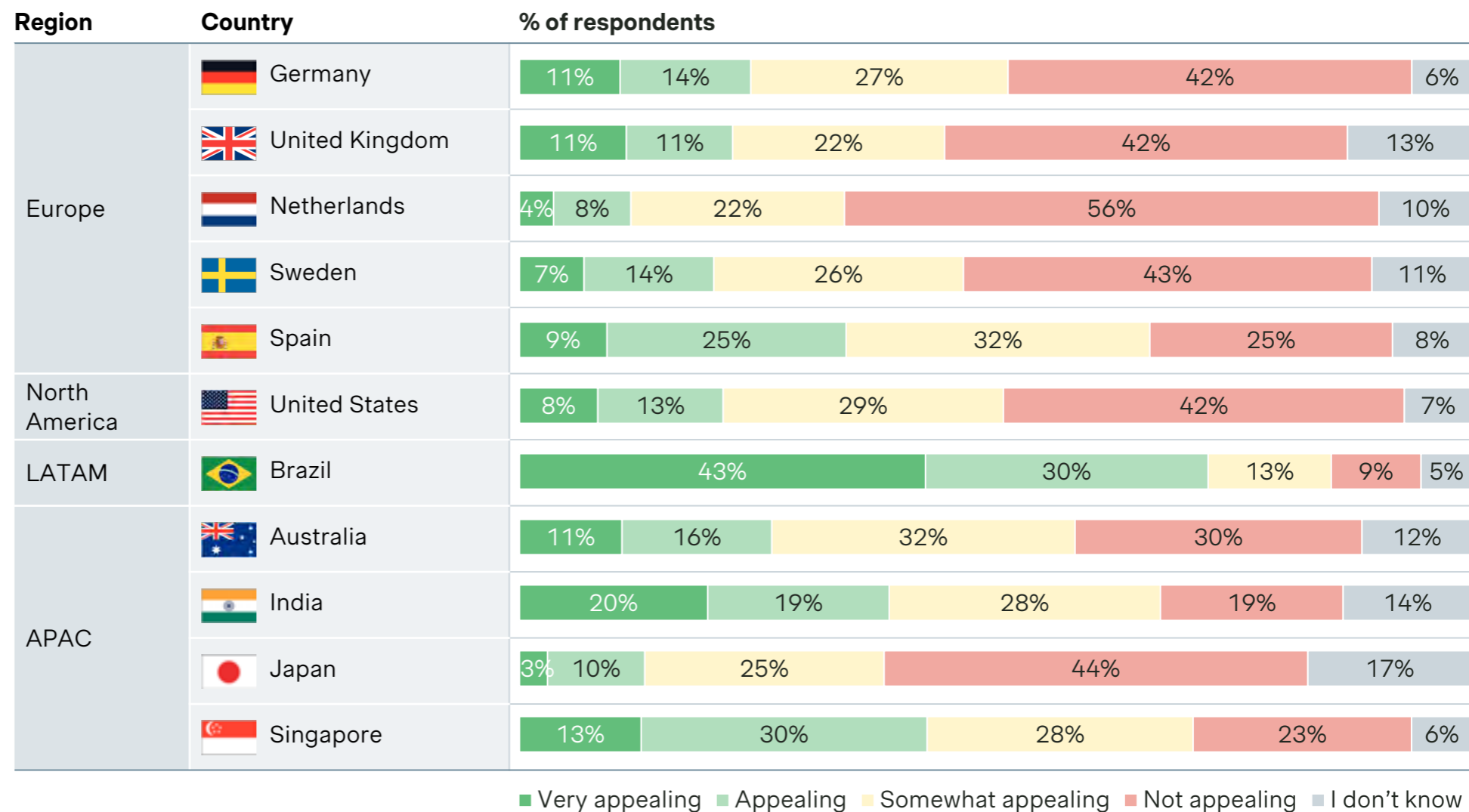
Question: Imagine that a streaming service offered a social feature which allowed you and your friends and family to see what each other are watching. How interested would you be in using this feature?

Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Streaming latency: Over half of users are drawn to features minimizing delays in live streaming



All respondents



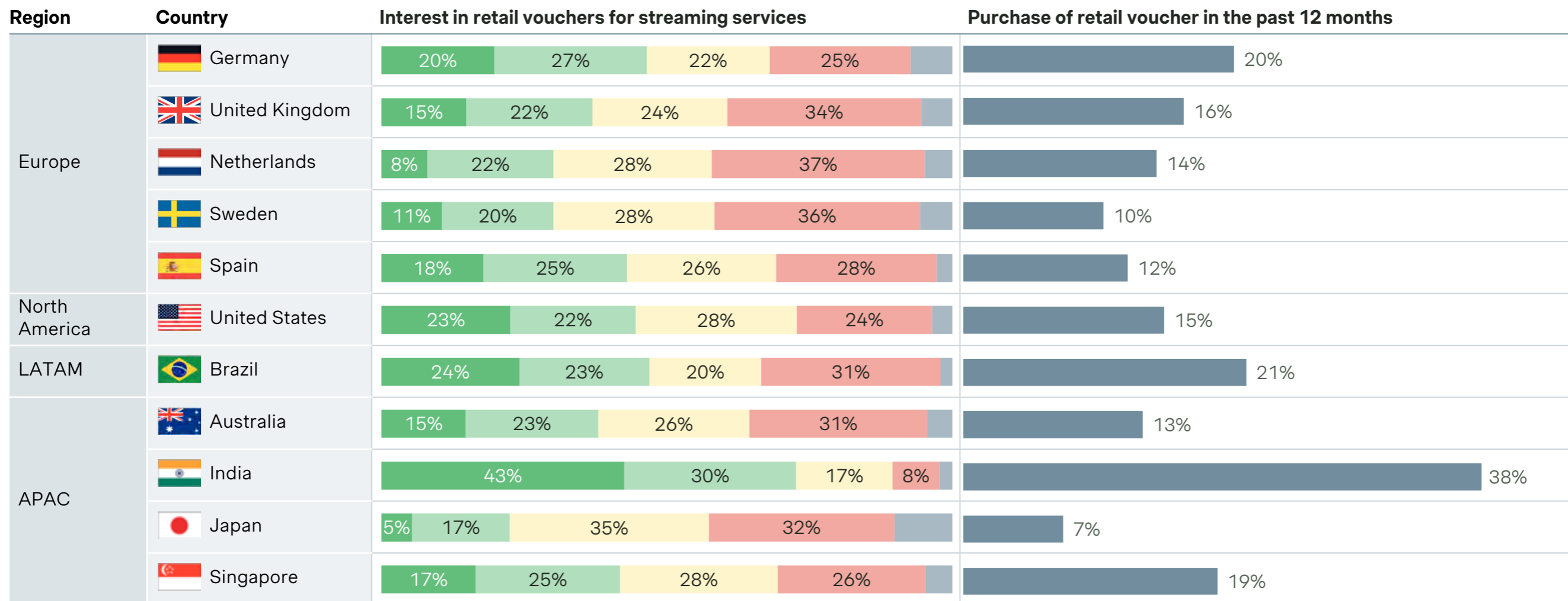
Question: Streaming providers that offer live events sometimes suffer from broadcast "delays" also referred to as "latency". This is the time difference between something happening in reality (e.g. a ball being kicked) and it happening on your screen. Imagine that a streaming service offered a feature which allowed you to watch live events with minimal delays (low latency). How interested would you be in using this feature?

Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326
 Simon-Kucher | The Global Streaming Study 2025

Retail vouchers: India leads in retail voucher engagement, where 38% of interested users have purchased a voucher in the past year



All respondents



Very appealing Appealing Somewhat appealing Not appealing I don't know

Question I: Retail vouchers for streaming services, such as Netflix Gift Cards, are prepaid cards available for purchase in stores like drugstores and supermarkets. These vouchers allow consumers to access streaming content without the need for a credit card or long-term subscription commitments.

For example, a €15 Netflix Gift Card can be bought and redeemed for streaming movies and TV shows. How interested would you be in using this feature?

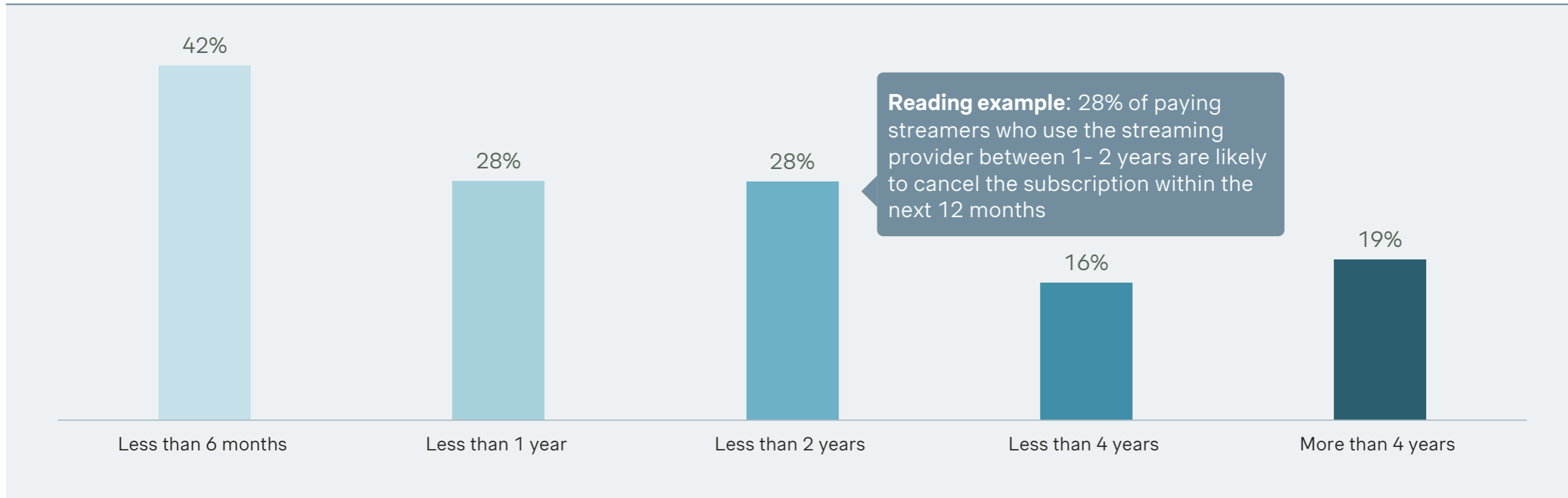
Question II: You previously mentioned that you find retail vouchers for streaming services [Pipe in answer from RetailVouchers]. Have you purchased such a voucher before? If yes, when have you last purchased one?

Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326

Churn intention by tenure: The longer global streamers already use the streaming service, the lower is their intention to churn

Paid subscribers

Stated intention to cancel a streaming subscription within the next 12 months by tenure

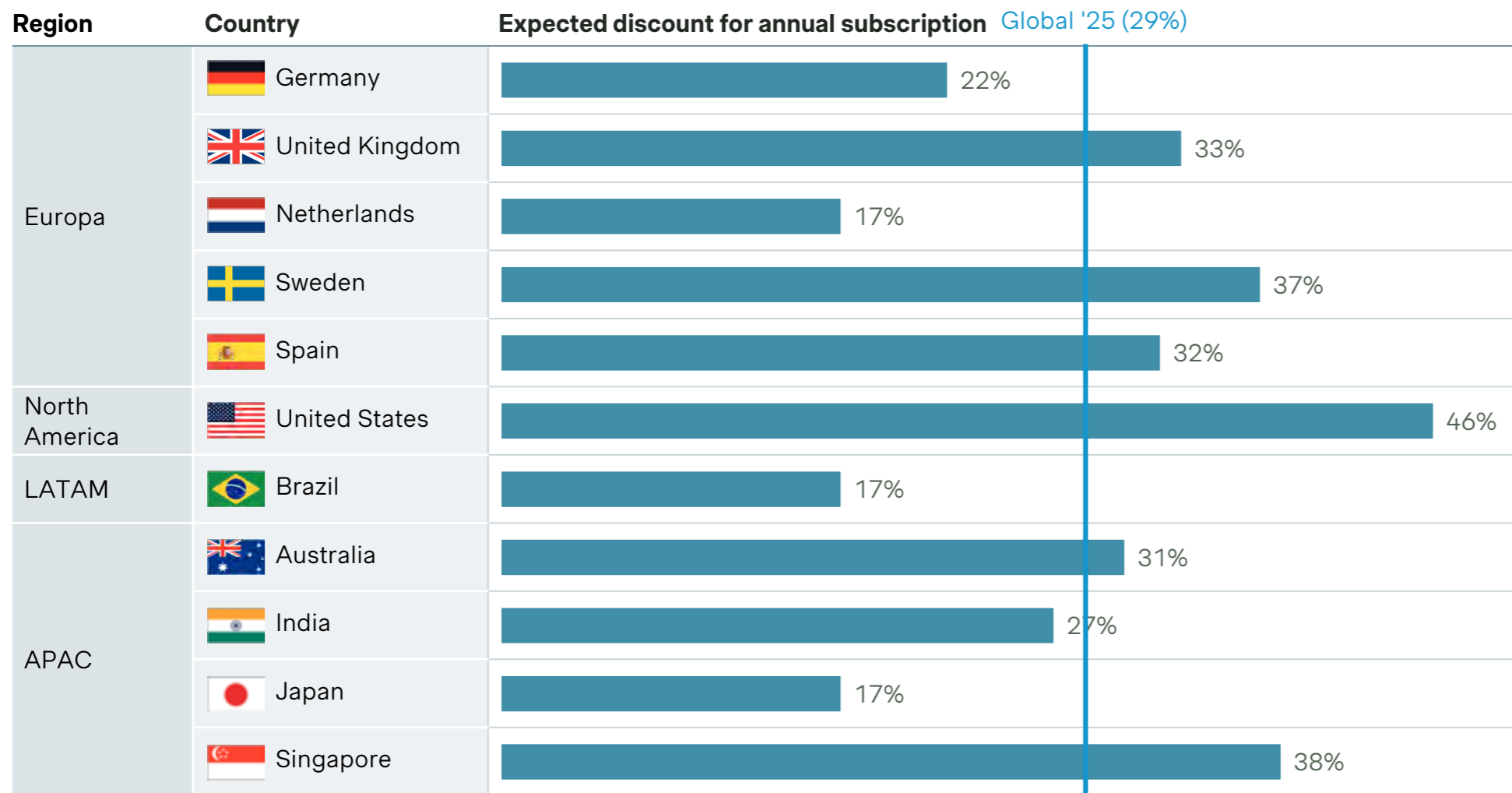


Subscription tenure is typically a key churn indicator, making the onboarding process during the trial period essential. Offering annual subscriptions has the potential to retain customers for longer.

Question I: When did you subscribe to the following platforms?, Question II: How likely are you to cancel each of your subscriptions within the next 12 months?
Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326 (n = 7,242 with at least 1 self-paid subscription)

Discount for annual subscriptions: Global streamers expect an average discount of 29% if subscribed and paid on an annual instead of a monthly basis

Average expected discount for annual subscription vs. monthly subscription, by country



All respondents

- Expected discount **varies significantly** among countries, with **USA, Sweden** and **Singapore** expecting the **largest discounts** (30% and over)
- Communicate monthly prices instead of the yearly prices as overall **willingness to pay is much higher on a monthly basis**
- Japan, Brazil** and **Netherlands** seem to accept the **10-month fee** applied as an industry average for a **yearly subscription** (around 17% discount)

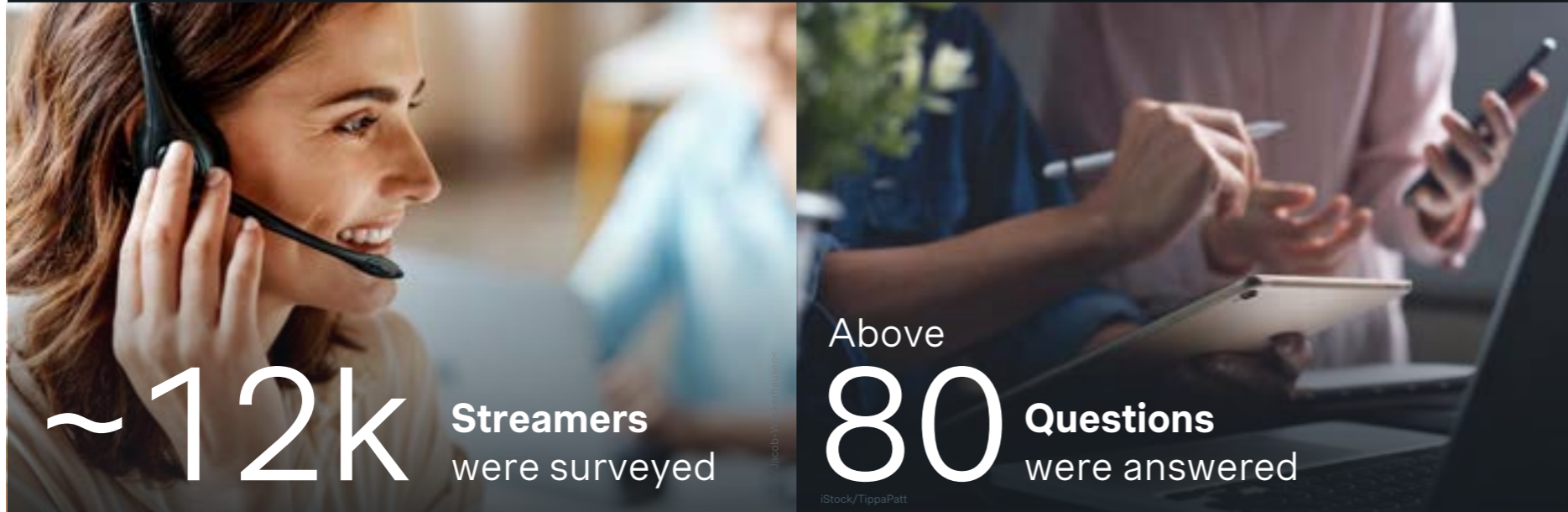
Question I: Imagine you were considering subscribing to a specific paid streaming service without ads because it offered content you wanted to watch. What price per month would you consider to be acceptable?
 Question II: Imagine being able to subscribe to the same service without ads but pay annually instead of monthly. What price per year would you consider to be acceptable?
 Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326. Outliers excluded from the analysis

5.

Methodology



Structure and methodology of the study: The global Streaming Study 2025 is based on a comprehensive approach to ensure detailed insights



Methodology

- Online survey conducted by Simon-Kucher
- Sample via panel provider: People who watch TV, films or live events via streaming regularly (on a daily or weekly basis)
- Representative sample: Respondents to the survey reflect the census statistics for age and sex in each market considered

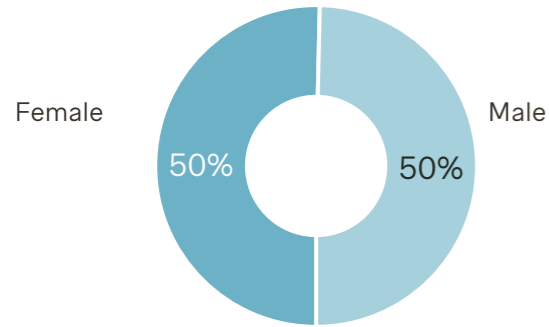
Survey period

April to May 2025

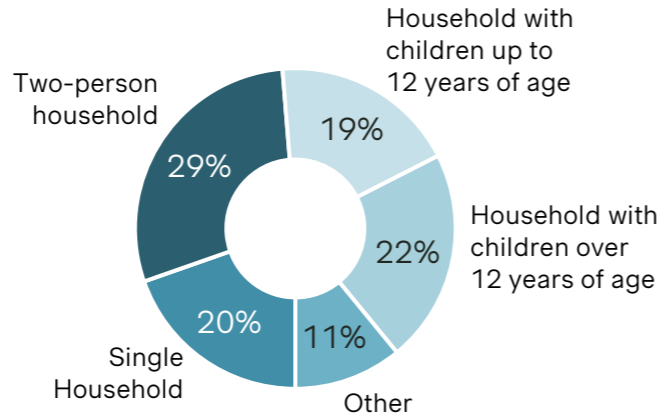
Respondents come from 11 different countries and are broadly spread across different demographic groups



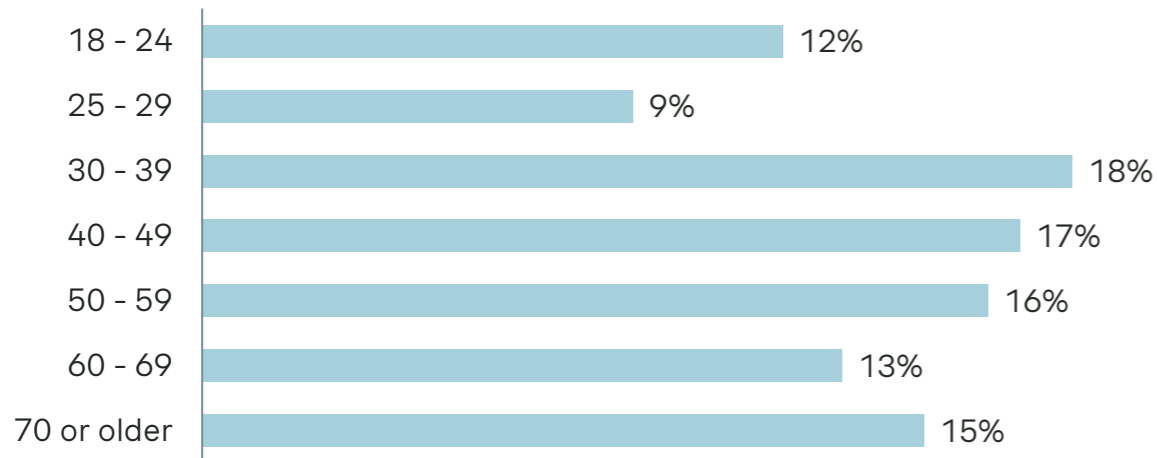
Sex



Household



Age



Countries by region

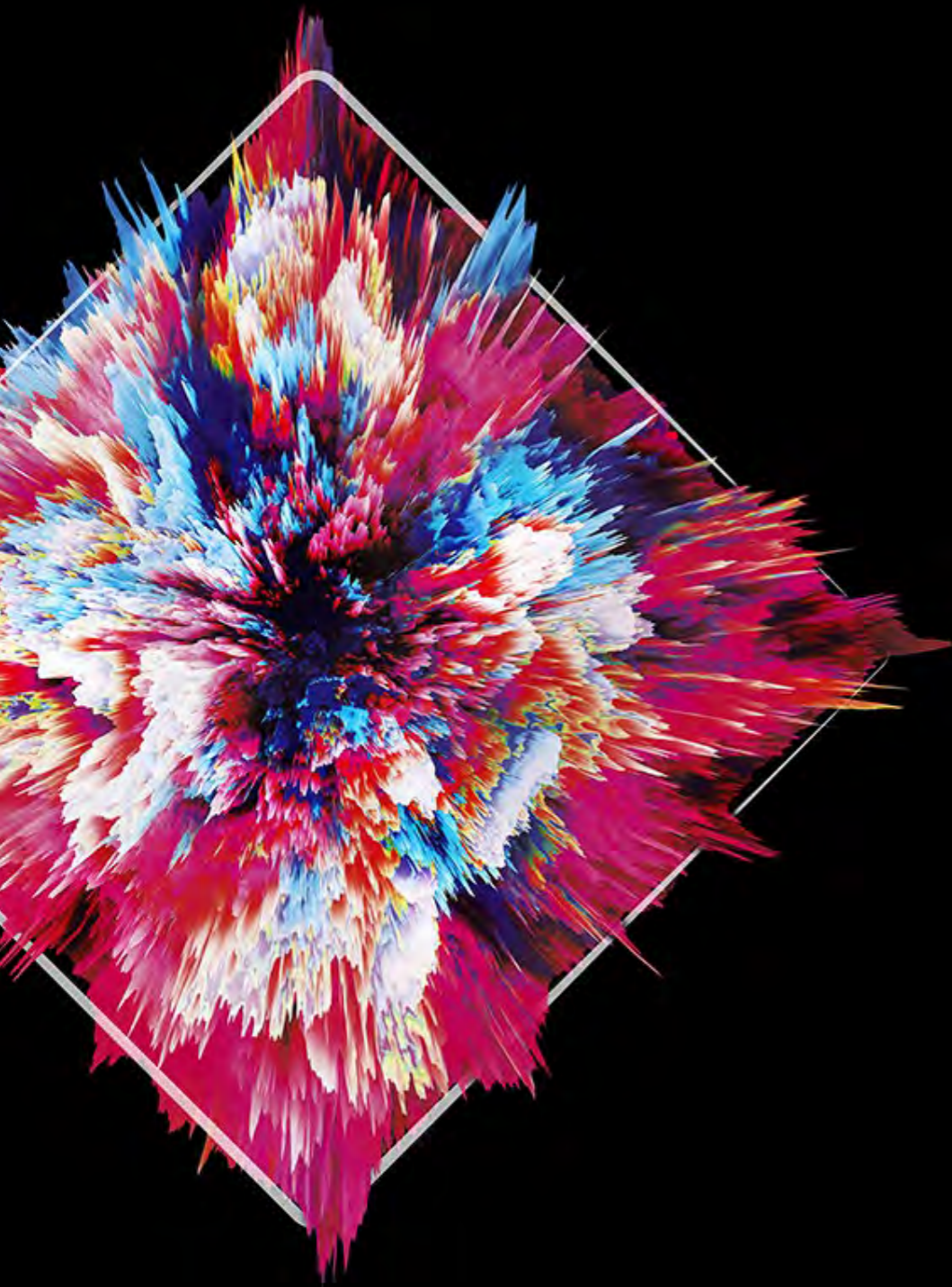
Region	Land	Percentage
Europe	Germany	8,2%
	United Kingdom	8,1%
	Netherlands	8,2%
	Sweden	8,2%
	Spain	8,2%
North America	United States	8,2%
LATAM	Brazil	8,2%
APAC	Australia	8,1%
	India	18,3%
	Japan	8,1%
	Singapore	8,2%

Source: Simon-Kucher Global Streaming Study 2025; Global n = 12,326



6.

About Simon-Kucher



"Unlocking better growth": Simon-Kucher is the global management consultancy for growth.

Our Company

- We are the experts for Commercial Strategy & Pricing Consulting, Transaction Services & Private Equity as well as Digital & Software.
- We work in a practical and results-oriented manner – and always in the interests of our customers.

Our Industries

- Consumer
- Financial Services
- Healthcare & Life Sciences
- Industrial
- Technology, Media & Telecom

Our customers

- We advise clients worldwide in almost every industry and size, from global players, mid-caps and private equity firms to start-ups.

Our reputation

- For decades, we have been a leading specialist in innovative pricing – it is part of our DNA.



FOUNDED IN
1985

46
OFFICES

31
COUNTRIES

2,000+
EMPLOYEES

200+
PARTNERS

Awarded worldwide



In 11 categories and practice areas, Simon-Kucher has been recognized by Forbes as one of the best management consultancies in the world for the third year in a row.

Forbes, together with Statista: The best management consulting firms worldwide, 2024

iStock/haikeyiya

Financial Times

Gold Ranking on the UK's List of Leading Management Consultancies for Marketing, Brand & Pricing, 2024



brand eins/Statista

#1 on the list of the best management consultancies in Germany for Marketing, Brand, Pricing, 2024



Forbes

Named one of the best management consultancies in America for nine consecutive years, 2024



Balance

#1 on the list of the best consulting companies in Switzerland for sales & marketing, 2022



Capital

#1 on the list of the best consulting firms in France for Marketing, Sales, Pricing, 2019



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