

451 Research VoCUL survey finds original content investment paying off for Netflix and Amazon Video

Consumers increasingly paying for three or more streaming video services

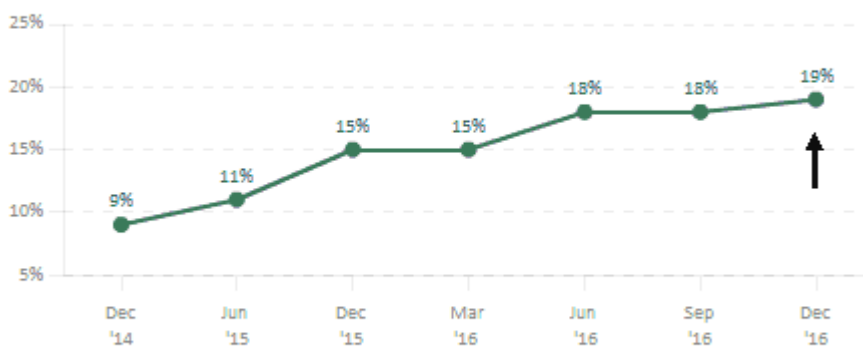
NEW YORK — March 20, 2017 — [451 Research](#) has revealed the latest trends in consumer use of streaming services in its quarterly [Voice of the Connected User Landscape \(VoCUL\)](#) survey. Key findings include the increasing popularity of original content and a growing trend of paying for multiple video services.

According to 451 Research’s survey, 19% of streaming subscribers are paying for three or more services – up 4 points over the previous year. These streaming enthusiasts are creating their own bundles of video services, starting with Netflix (95%) and Amazon Video (82%) then adding a combination of subscription and a-la-carte platforms including Hulu, HBO Now and iTunes.

Growth in Consumers Paying for Multiple Streaming Services

Dec 2014 - Dec 2016

% of online video customers who pay for 3 or more streaming services



Source: 451 Research's VoCUL: TV Industry Trends (Leading Indicator Survey), Dec 2016



Among all respondents who pay for a streaming service, 79% say they subscribe to Netflix and 53% to Amazon Video. Amazon Video continues to be the growth story, up 5 points over the past year.

Access to movies (50%) remains the top reason why consumers pay for streaming video services; viewing *complete seasons of TV shows* (45%) is a close second and has increased 6 points in just six months.

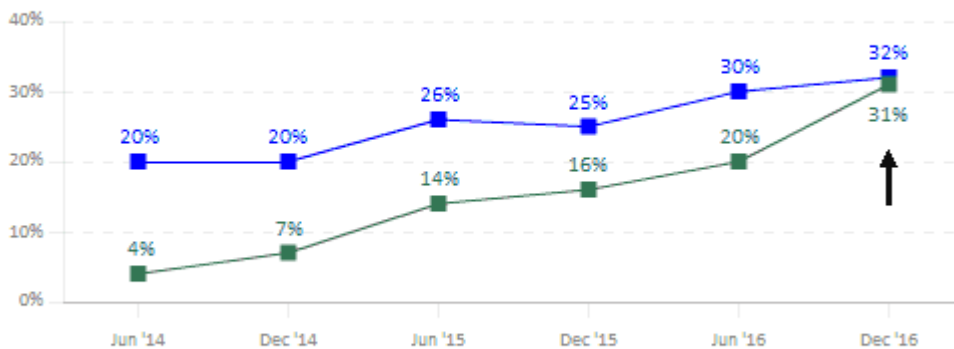
Importantly, 33% of streaming subscribers chose their service for its *original content*, up 8 points year over year. Original content has always been a major differentiator for HBO and Showtime, but the VoCUL survey highlights a growing importance of original content among Netflix users (36%; up 9 points over a year) and Amazon Video users (36%; up 14 points over a year).

While both Netflix and Amazon Video users in the VoCUL survey have shifted towards watching more original content over the past two years, there is an even faster increase among Amazon Video users (from 7% to 31%) who say original content is their most watched type of video content, compared to Netflix users (from 20 to 32%).

Original Content: Netflix vs. Amazon Video

Feb 2012 - Dec 2016

% of Netflix/Amazon Video customers who watch Original Content most often



Source: 451 Research's VoCUL: TV Industry Trends (Leading Indicator Survey), Dec 2016



“Netflix and Amazon have spent billions creating exclusive original content to differentiate themselves within a competitive streaming TV market, and our latest surveys show that it’s resonating with customers. Viewing original content has become a much more important factor over the past year in choosing streaming services, and the data shows consumers are simply watching more of it.” said Andy Golub, managing director of 451 Research's Voice of the Connected User Landscape end-user surveys and research.

The 451 Research VoCUL survey also looked at the streaming media device market, which continues to be ruled by Roku, Apple, Google and Amazon. Among respondents who own a streaming media device, Roku leads with 31% owning a Roku streaming player and 10%, a Roku Streaming Stick/Express. Apple TV (35%) is second, followed by Google Chromecast (26%). Although they represent a smaller share of the overall market, Amazon’s Fire TV devices are seeing the most momentum with Fire TV Stick (13%) up 2 points and Amazon Fire TV (10%) is up 1 point.

About the survey

451 Research’s VoCUL *TV and Alternative TV Trends* survey took place in December 2016. 1,270 North American respondents from 451 Research’s Leading Indicator panel were surveyed about paid video services, streaming media devices and smart TVs, and cord-cutting trends.

[VoCUL](#) answers key questions for service providers, vendors and investors trying to understand trends and disruptions in how consumer and corporate users buy and use technology. It identifies and tracks the market impact of changes in technology end-user buying behavior and preferences through quarterly monitoring from multiple survey groups.

Subscribers can access the complete report [here](#).

About 451 Research

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