

INSIGHTS 2019

AudienceProject 

Traditional TV, online video &
streaming - Disney+ special

US
UK
Germany
Denmark
Sweden
Norway
Finland



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EDITORIAL

Will Disney spin a business fairytale?

Disney is gearing up to take on Netflix in the US

Despite Disney+ just now going live in the US and the release still months in the future in Europe, the new streaming service is already looking to become a challenger for the top spots in a crowded field. In the US, more than half have already heard about Disney+ and 43% intend to subscribe. Not surprisingly, especially families with children are expected to sign up to Disney+.

The good news for the incumbent services is that most people will keep their existing packages. However, about 40% of the subscriber-intenders expect to cancel one or more of Disney's competitors, with Netflix being mentioned most often. In the US, Norway and Finland, the likely drop will hit the hardest with 7%, 8% and 8%, respectively.

It is not all sour for Netflix though. For the first time, the American company is number one in all the seven countries covered in our study - even in Finland, where the local broadcaster YLE up until now has been sitting on the throne. Talking about thrones, the biggest jump in users in the Nordics comes from HBO Nordic, while HBO is finding it harder to gain traction in its home market. The question is if it can hold that position in the North post Game of Thrones.

Rune Werliin

Chief Product Officer @ AudienceProject

DISNEY+

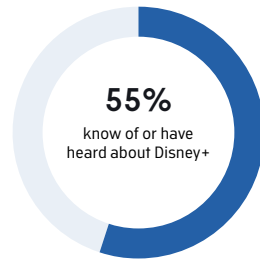
Even before the launch of Disney+, the awareness of Disney's new streaming service is massive. Additionally, a lot of people are already considering subscribing to the new streaming service. For many, it will be at the expense of subscriptions to other streaming services, especially Netflix subscriptions.

More than half in the US know about Disney's new streaming service

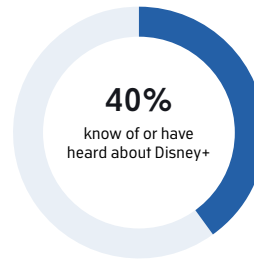
[How many know of or have heard about Disney+?]



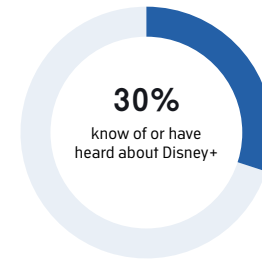
US



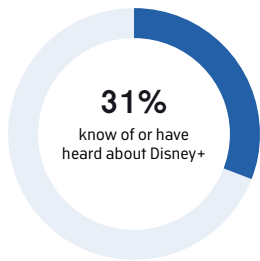
UK



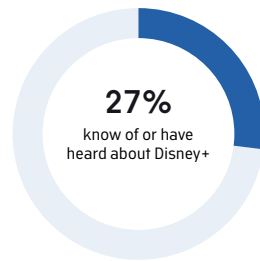
Germany



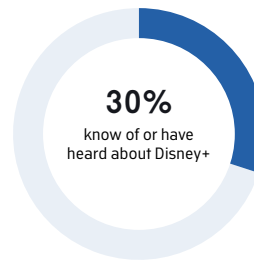
Denmark



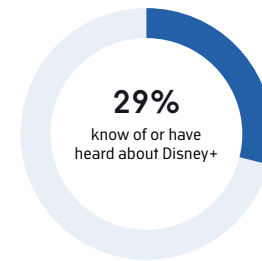
Sweden



Norway



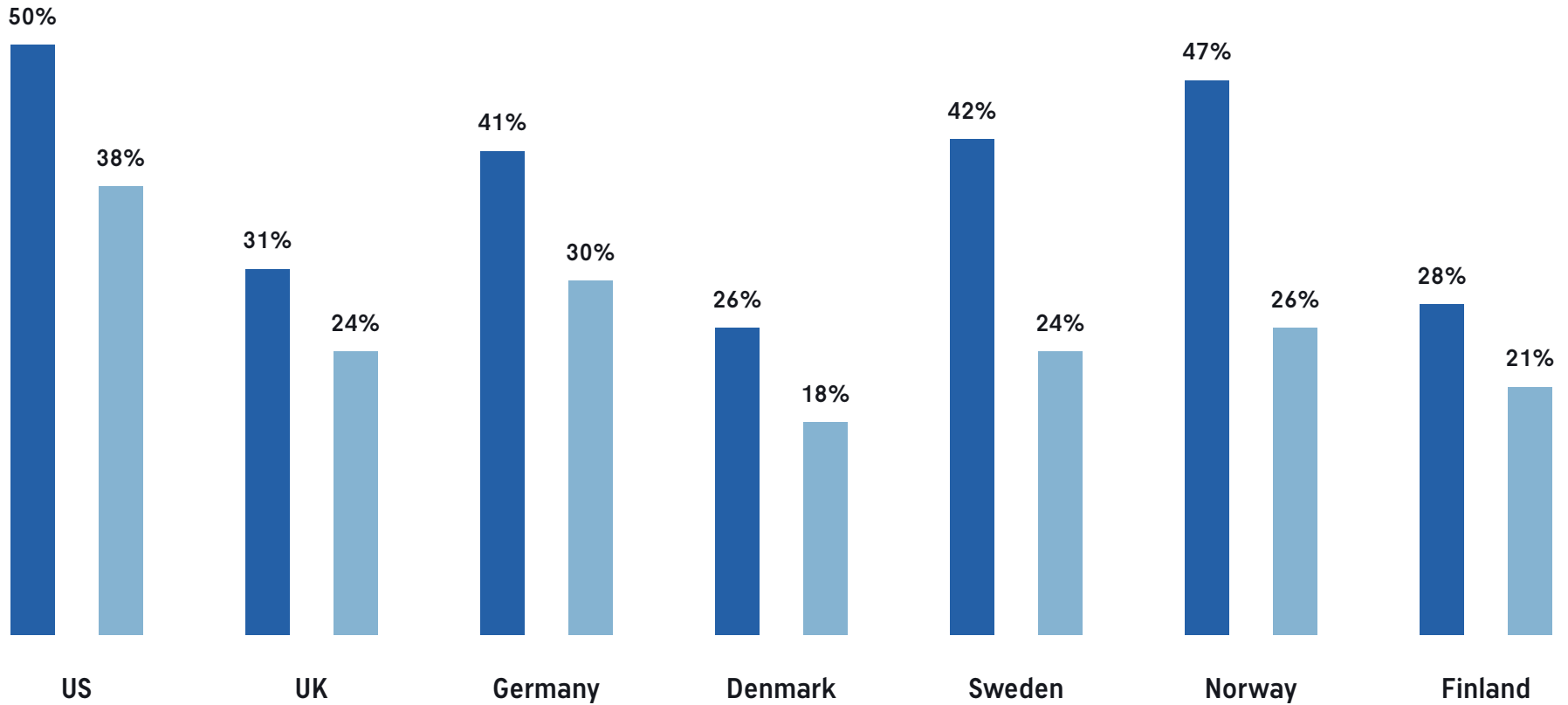
Finland



Especially families with children will subscribe to Disney+

[How many are considering subscribing to Disney+?]

- Households **with** children
- Households **without** children



In the following pages, we will show how many consumers are considering subscribing to Disney+ when it is launched, how many of the subscriber-intenders are also considering unsubscribing from any of their existing streaming services, and which streaming services are likely to be dropped in favour of Disney+.

Great interest in subscribing to Disney+ in the US - and unsubscribing from existing services

43%

are considering subscribing to Disney+ when it is launched



40% are considering unsubscribing from one or more of their existing streaming services

Which streaming services will people unsubscribe from?

33%



Netflix

18%



Hulu

13%



Amazon Prime

8%



HBO Now

3%

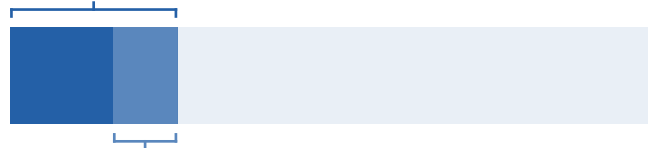


HBO Go

Future Disney+ subscribers in the UK will primarily unsubscribe from Netflix

26%

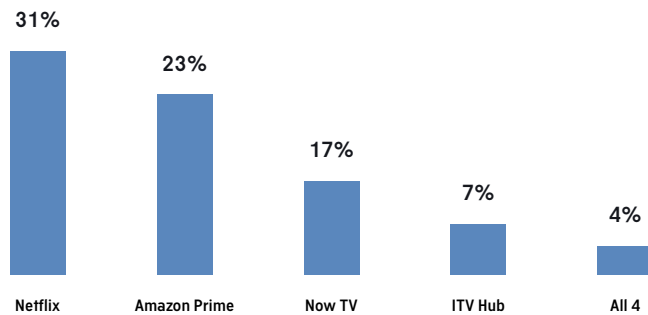
are considering subscribing to Disney+ when it is launched



37% are considering unsubscribing from one or more of their existing streaming services



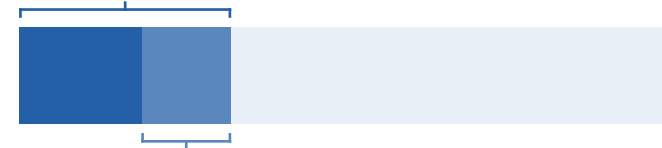
Which streaming services will people unsubscribe from?



Future Disney+ subscribers in Germany will mostly unsubscribe from Netflix and Amazon Prime

33%

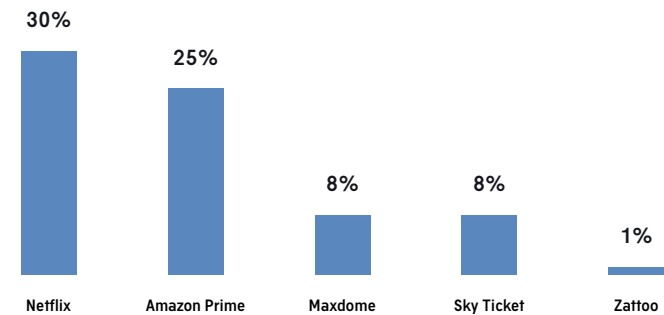
are considering subscribing to Disney+ when it is launched



41% are considering unsubscribing from one or more of their existing streaming services



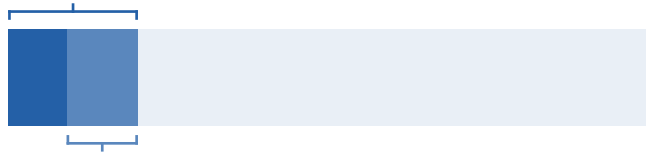
Which streaming services will people unsubscribe from?



More than half of future Disney+ subscribers in Denmark will unsubscribe from existing services

21%

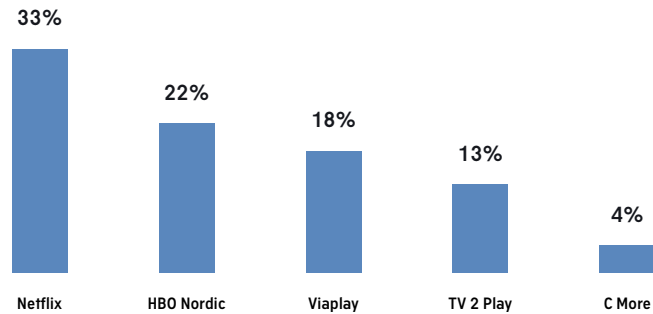
are considering subscribing to Disney+ when it is launched



55% are considering unsubscribing from one or more of their existing streaming services



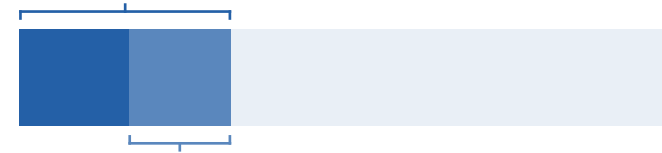
Which streaming services will people unsubscribe from?



Future Disney+ subscribers in Sweden will primarily unsubscribe from Netflix

33%

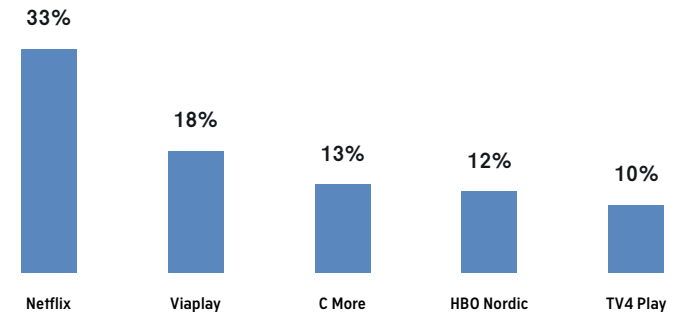
are considering subscribing to Disney+ when it is launched



48% are considering unsubscribing from one or more of their existing streaming services



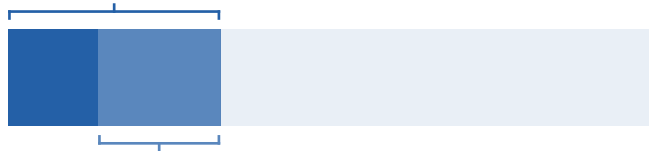
Which streaming services will people unsubscribe from?



More than half of future Disney+ subscribers in Norway will unsubscribe from existing services

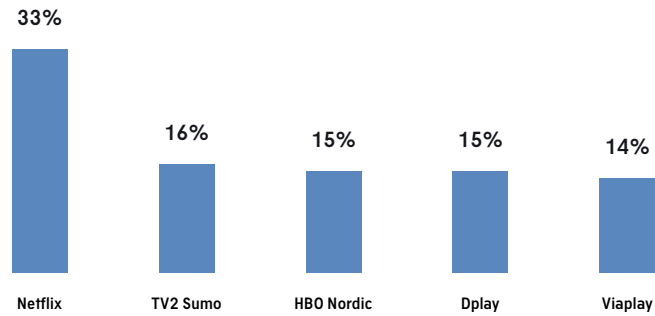
33%

are considering subscribing to Disney+ when it is launched



57% are considering unsubscribing from one or more of their existing streaming services

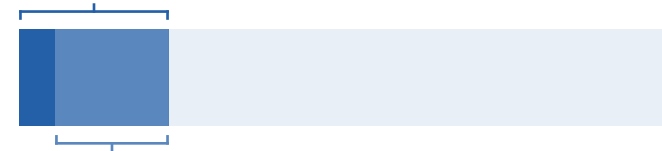
Which streaming services will people unsubscribe from?



Three quarters of future Disney+ subscribers in Finland will unsubscribe from existing services

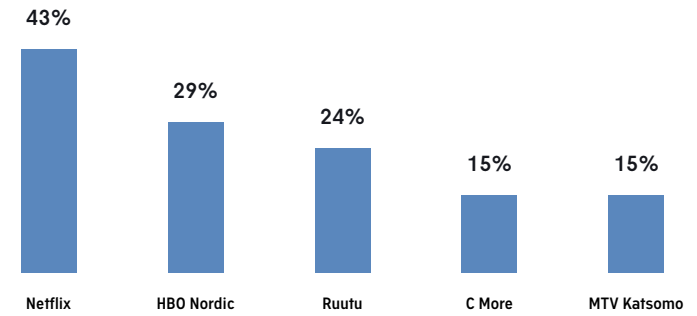
23%

are considering subscribing to Disney+ when it is launched



76% are considering unsubscribing from one or more of their existing streaming services

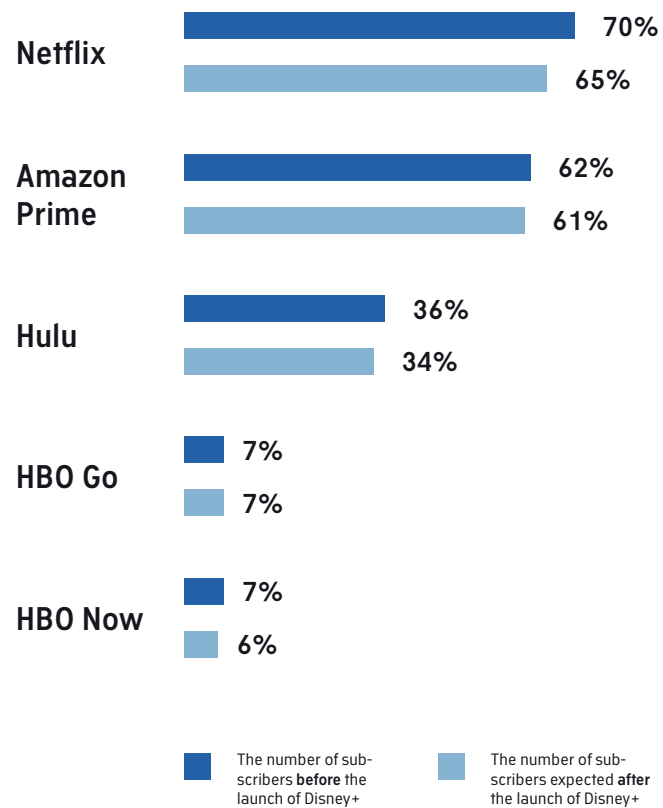
Which streaming services will people unsubscribe from?



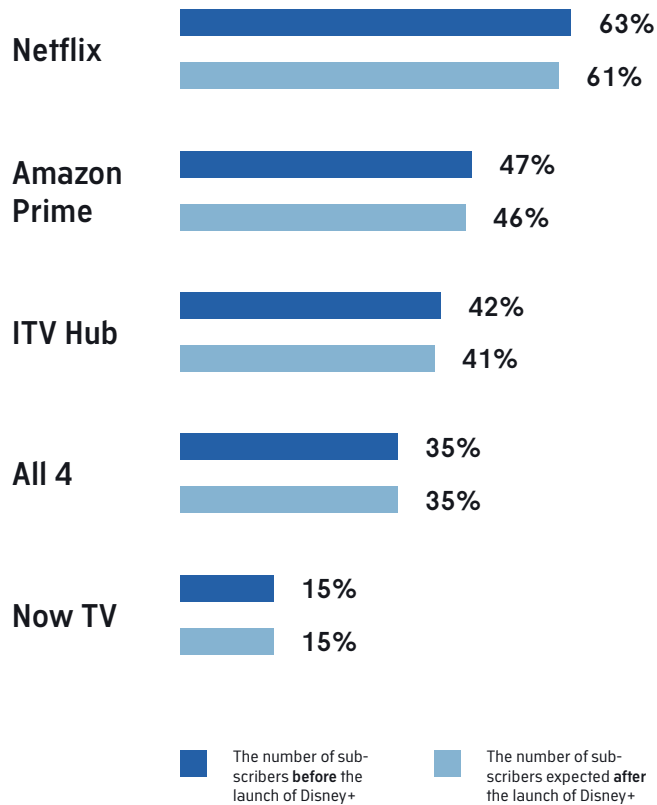
In the following pages, we will show how many are currently subscribing to different streaming services and how many we can expect to be subscribing to different streaming services after Disney+ is launched.



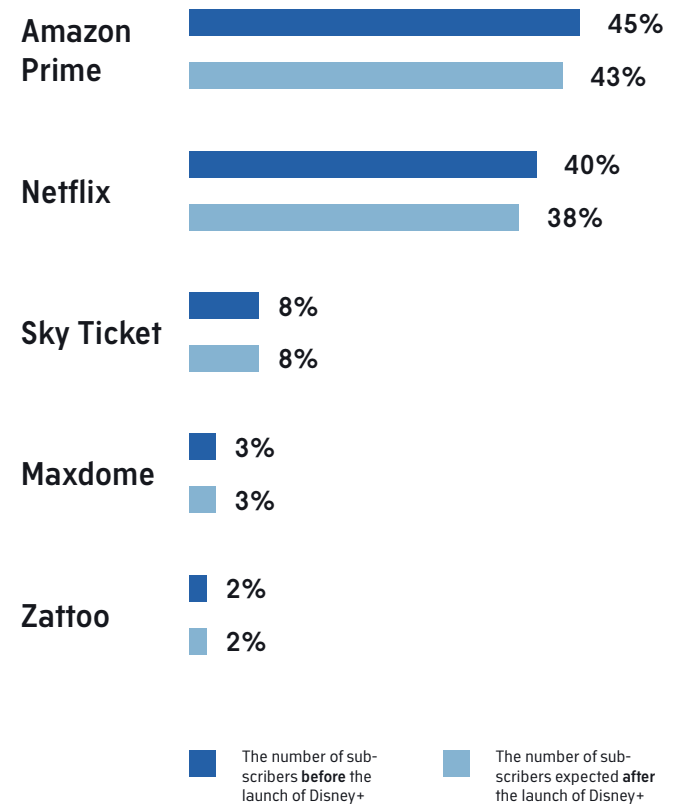
The number of Netflix subscribers in the US is expected to drop by 7% after the launch of Disney+



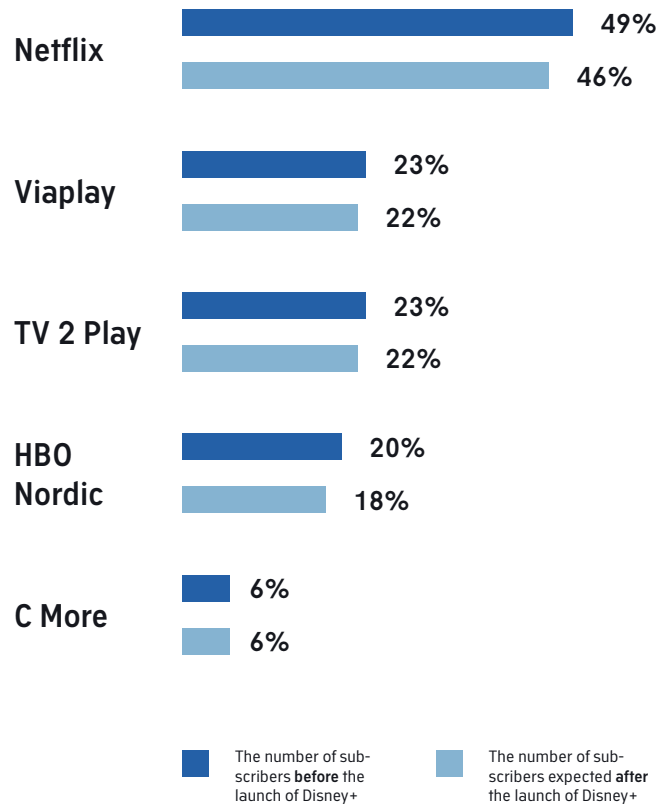
Netflix is expected to see a large drop in the number of UK subscribers after the launch of Disney+



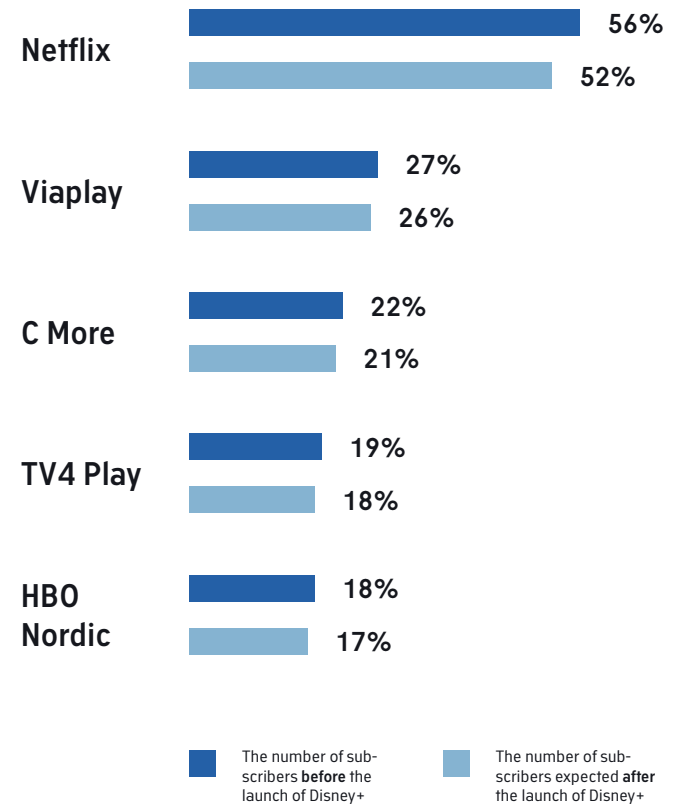
The launch of Disney+ is expected to have a high impact on Amazon Prime and Netflix in Germany



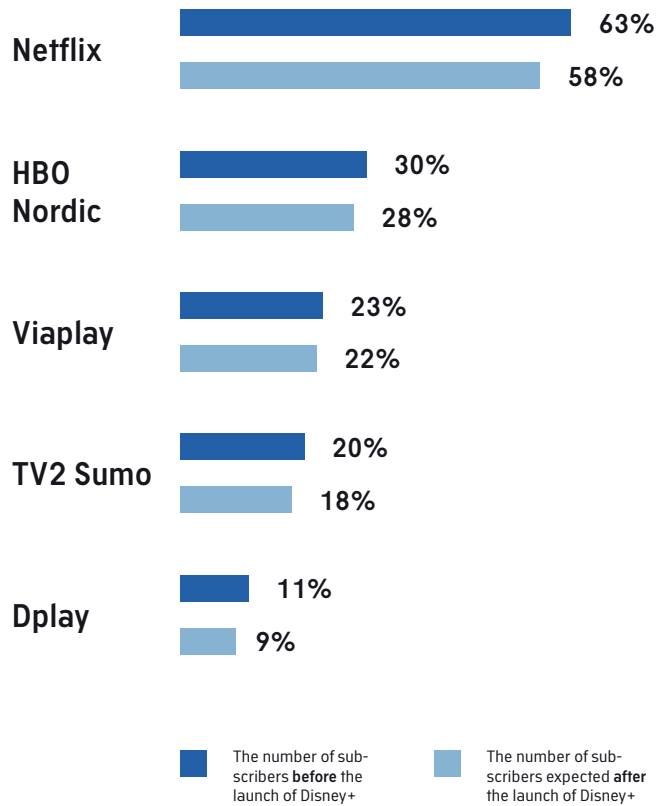
The launch of Disney+ is expected to have a high impact on Netflix and HBO Nordic in Denmark



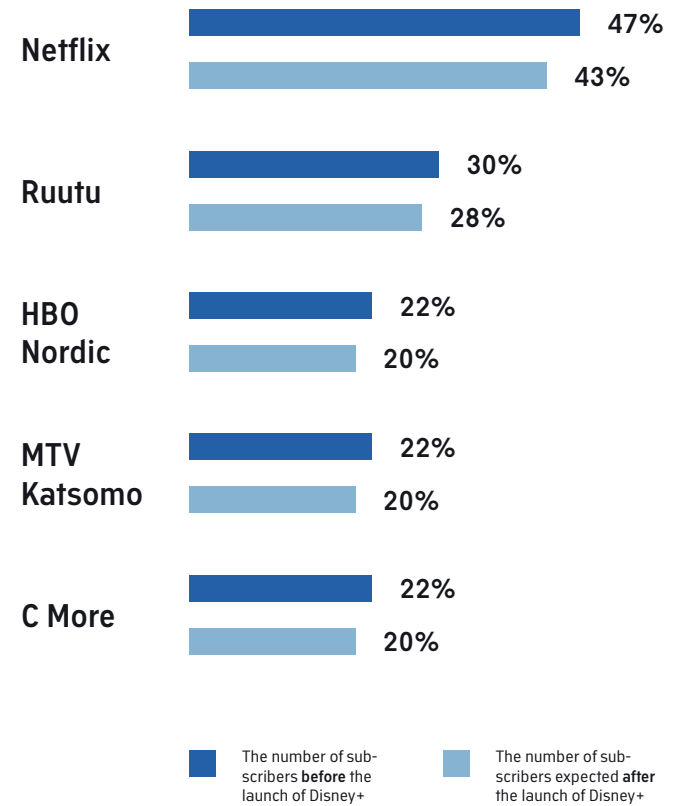
Netflix is expected to see a large drop in the number of Swedish subscribers after the launch of Disney+



The number of Netflix subscribers in Norway is expected to drop by 8% after the launch of Disney+



The launch of Disney+ is expected to have a high impact on all the bigger services in Finland



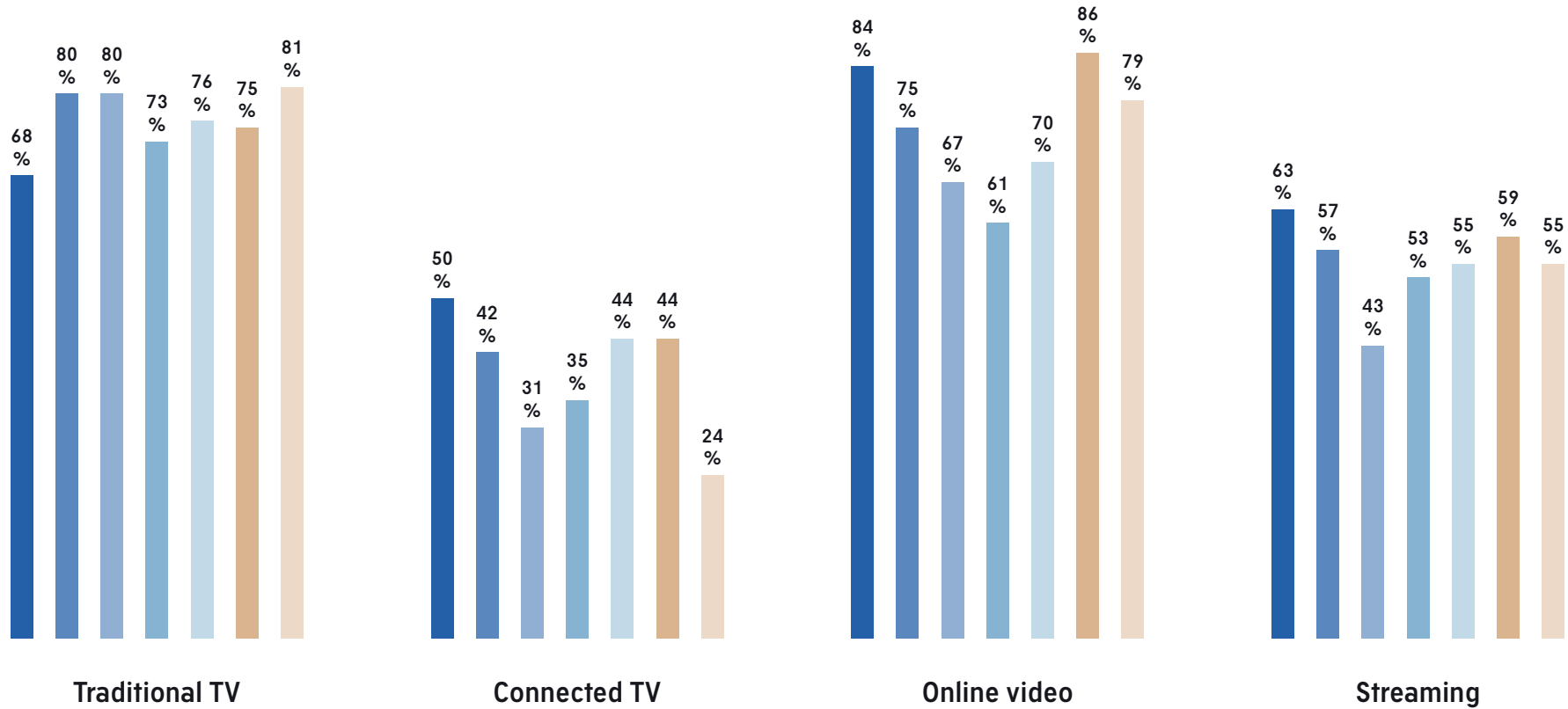
MEDIA USAGE

Looking at the general media usage, we see that traditional TV viewing keeps dropping, while both the usage of connected TV boxes, online video viewing and streaming increases. As shown in the previous chapter, the launch of Disney+ is expected to have a high impact on the number of Netflix subscribers but for now, the number of Netflix users keeps on increasing.

The US is leading the way in terms of streaming

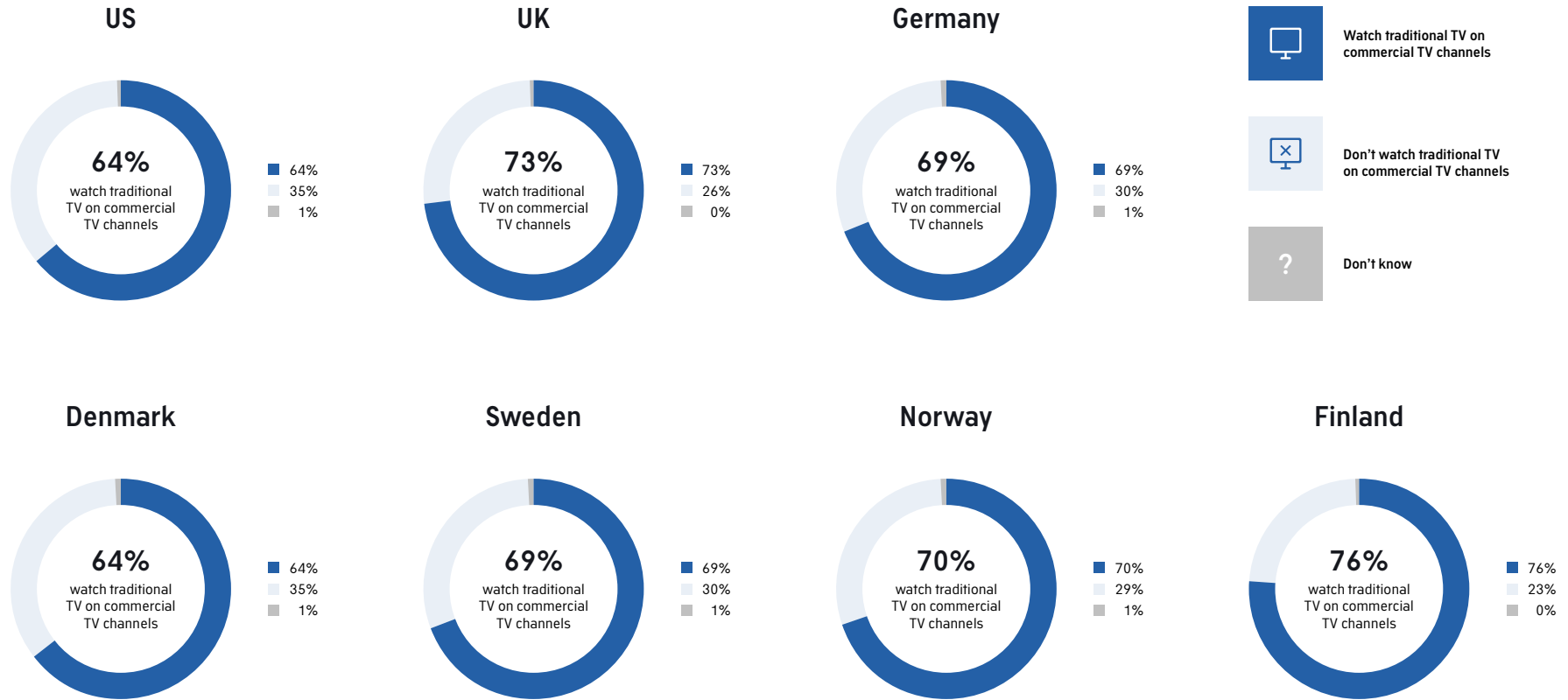
[How many watch traditional TV, how many watch TV via connected TV boxes, how many watch online video and how many stream or download TV, series or movies on a weekly basis?]

- US
- UK
- Germany
- Denmark
- Sweden
- Norway
- Finland



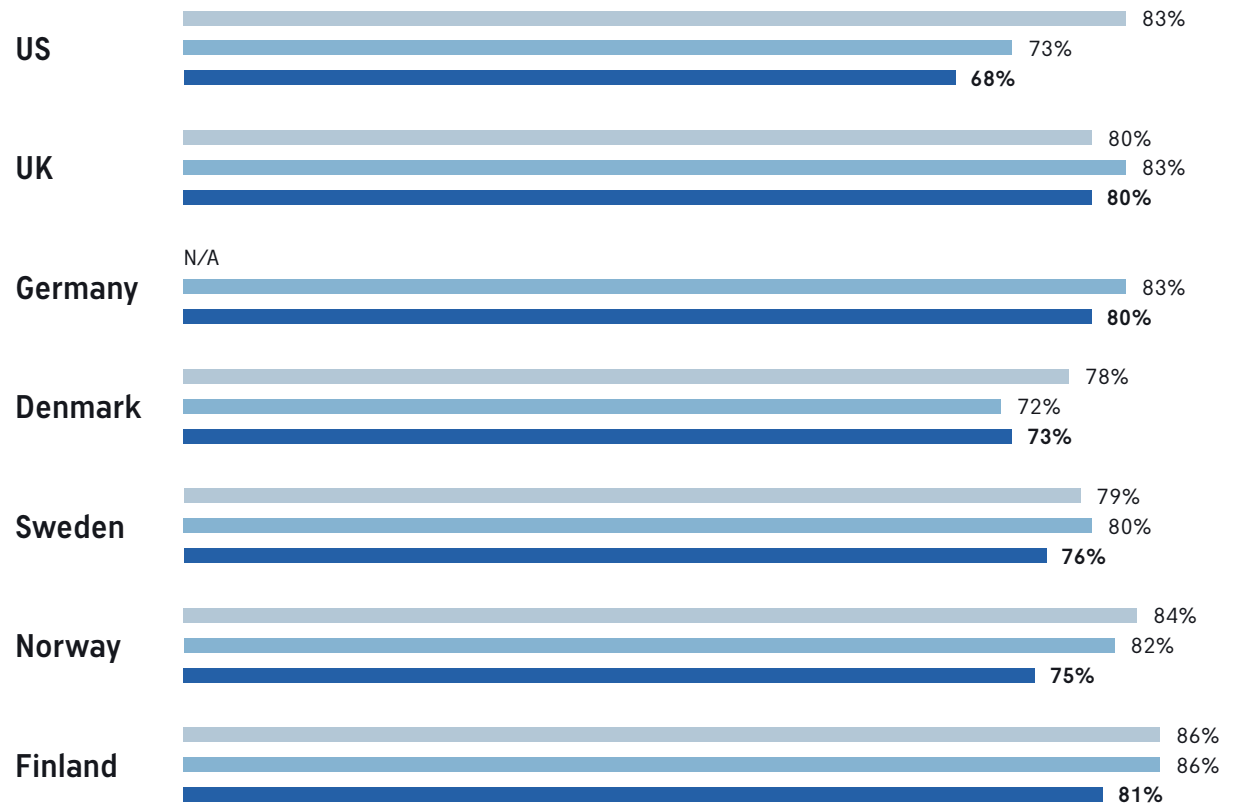
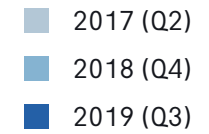
Less than three quarters watch traditional TV on commercial TV channels

[How many watch traditional TV on commercial TV channels on a weekly basis?]



Traditional TV viewing keeps dropping

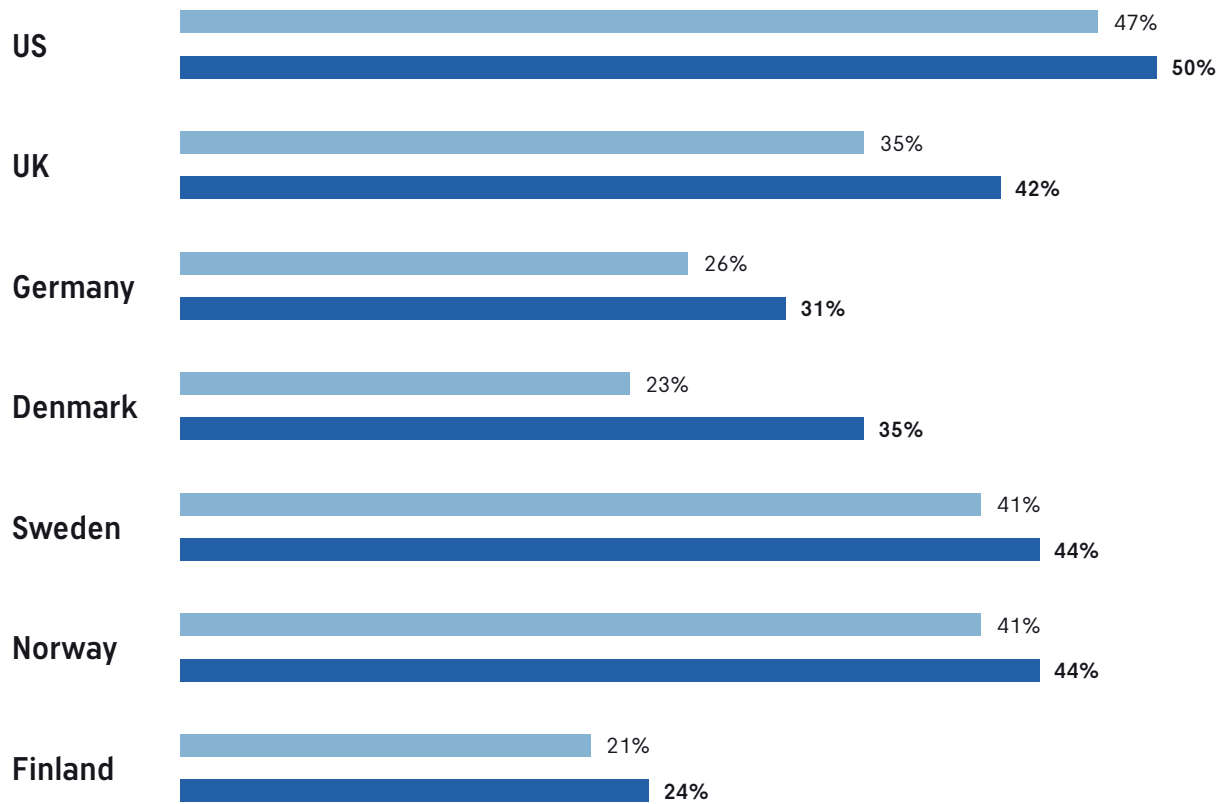
[How many watch traditional TV on a weekly basis?]



The use of connected TV boxes increases

[How many watch TV via connected TV boxes on a weekly basis?]

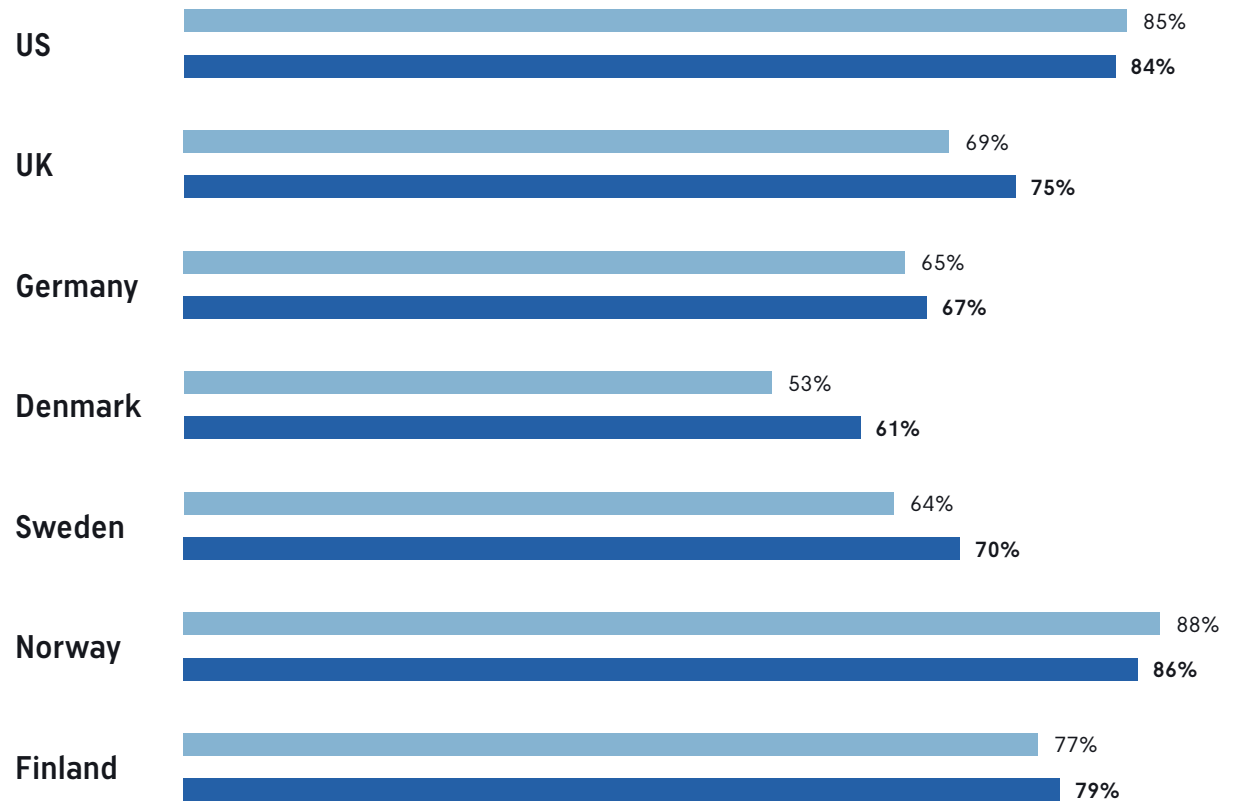
■ 2018 (Q4)
■ 2019 (Q3)



More people watch online videos

[How many watch online video on a weekly basis?]

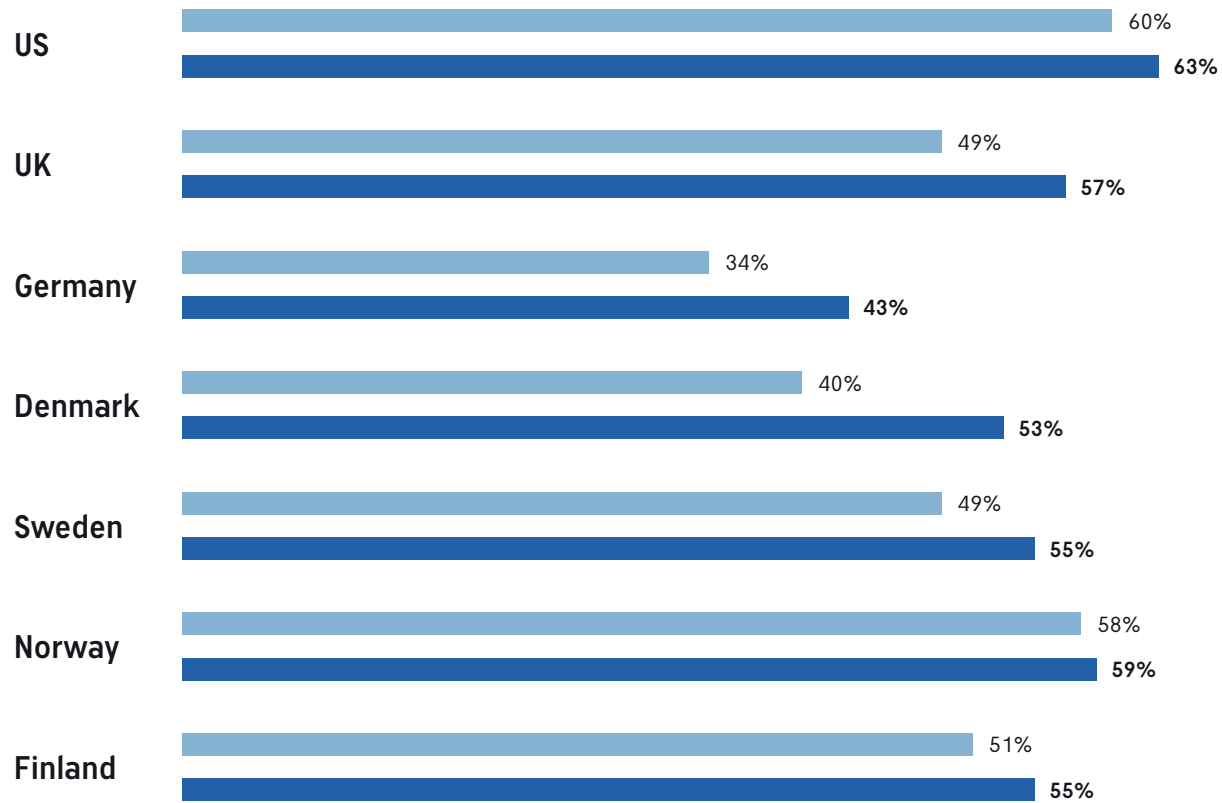
■ 2018 (Q4)
■ 2019 (Q3)



Streaming increases in all countries

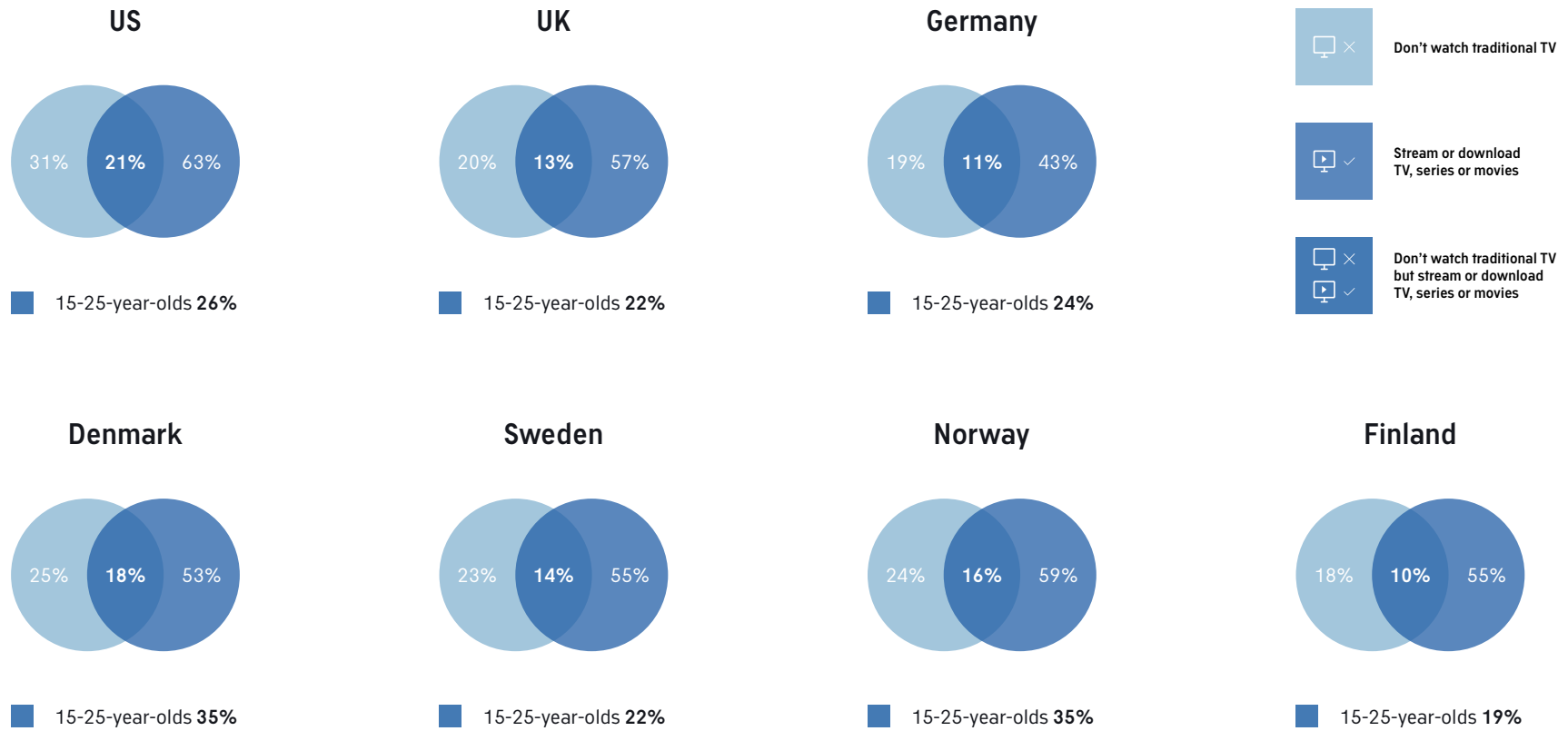
[How many stream or download TV, series or movies on a weekly basis?]

■ 2018 (Q4)
■ 2019 (Q3)



A large number of people can only be reached on streaming services

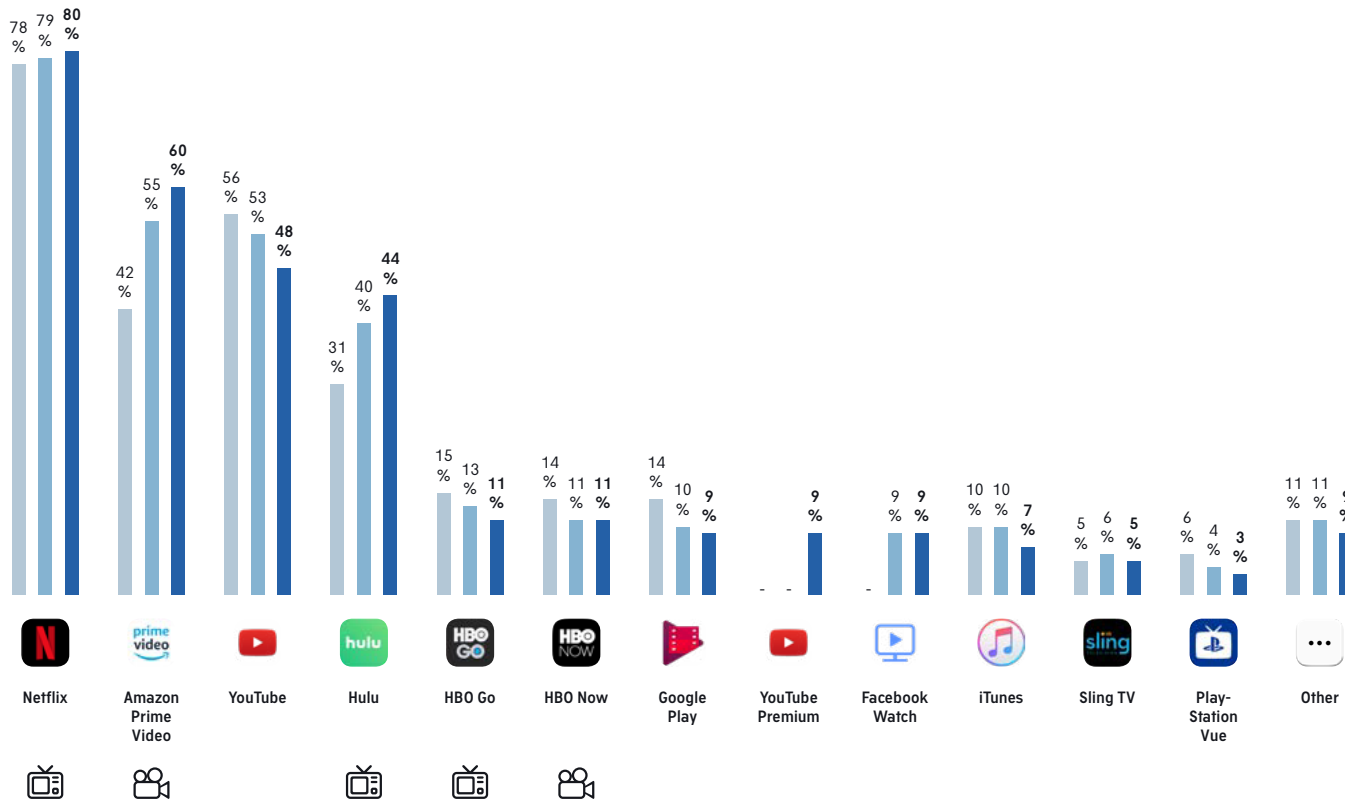
[How many don't watch traditional TV but stream or download TV, series or movies]



Top streaming and downloading services in the US

[Which streaming and downloading services do Americans use to watch TV, series or movies?]

■ 2017 (Q2)
■ 2018 (Q4)
■ 2019 (Q3)



- **Mainly used to watch movies**
- **Mainly used to watch series**
- **Mainly used to watch sports**

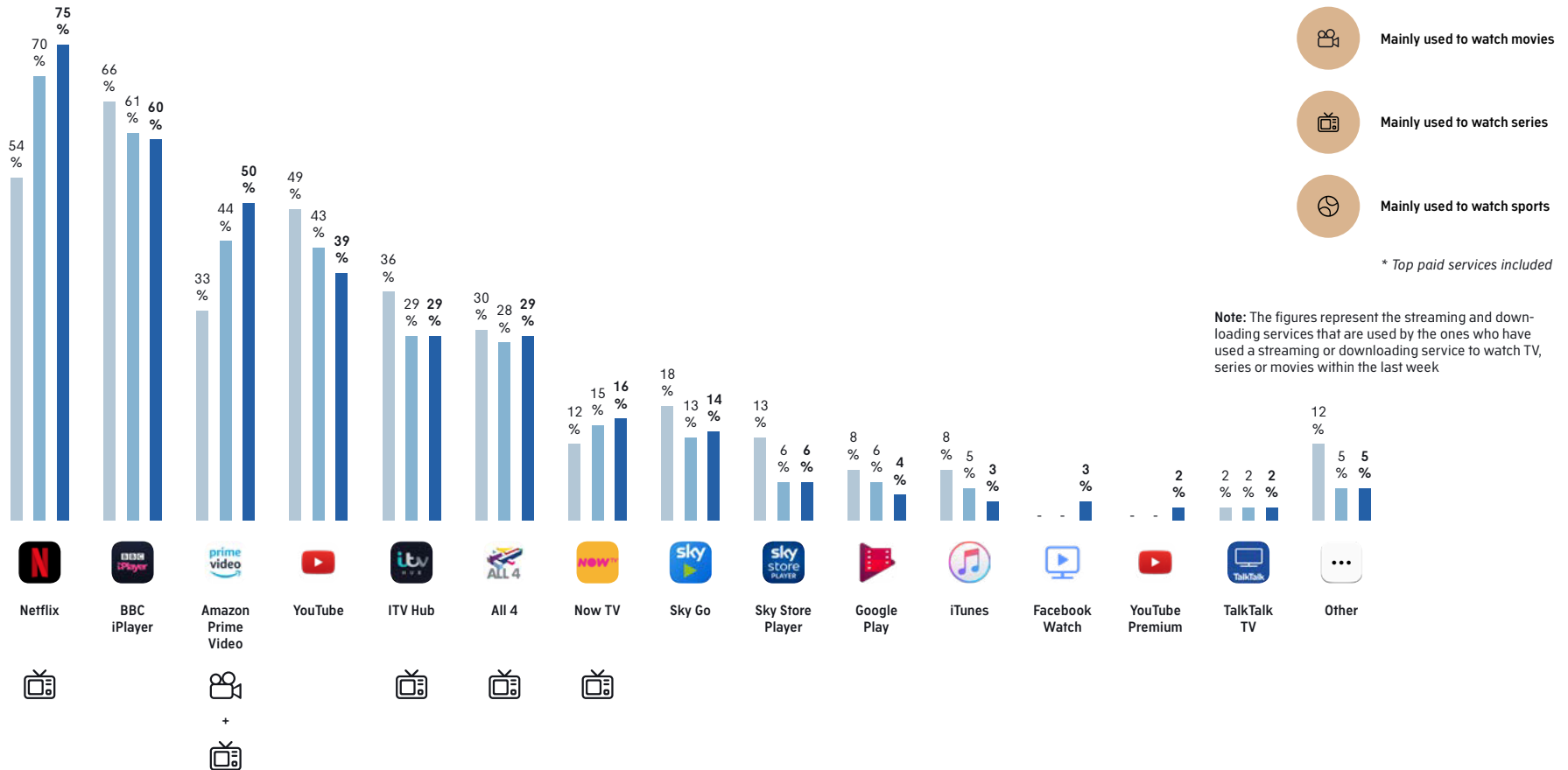
* Top paid services included

Note: The figures represent the streaming and downloading services that are used by the ones who have used a streaming or downloading service to watch TV, series or movies within the last week

Top streaming and downloading services in the UK

[Which streaming and downloading services do Britons use to watch TV, series or movies?]

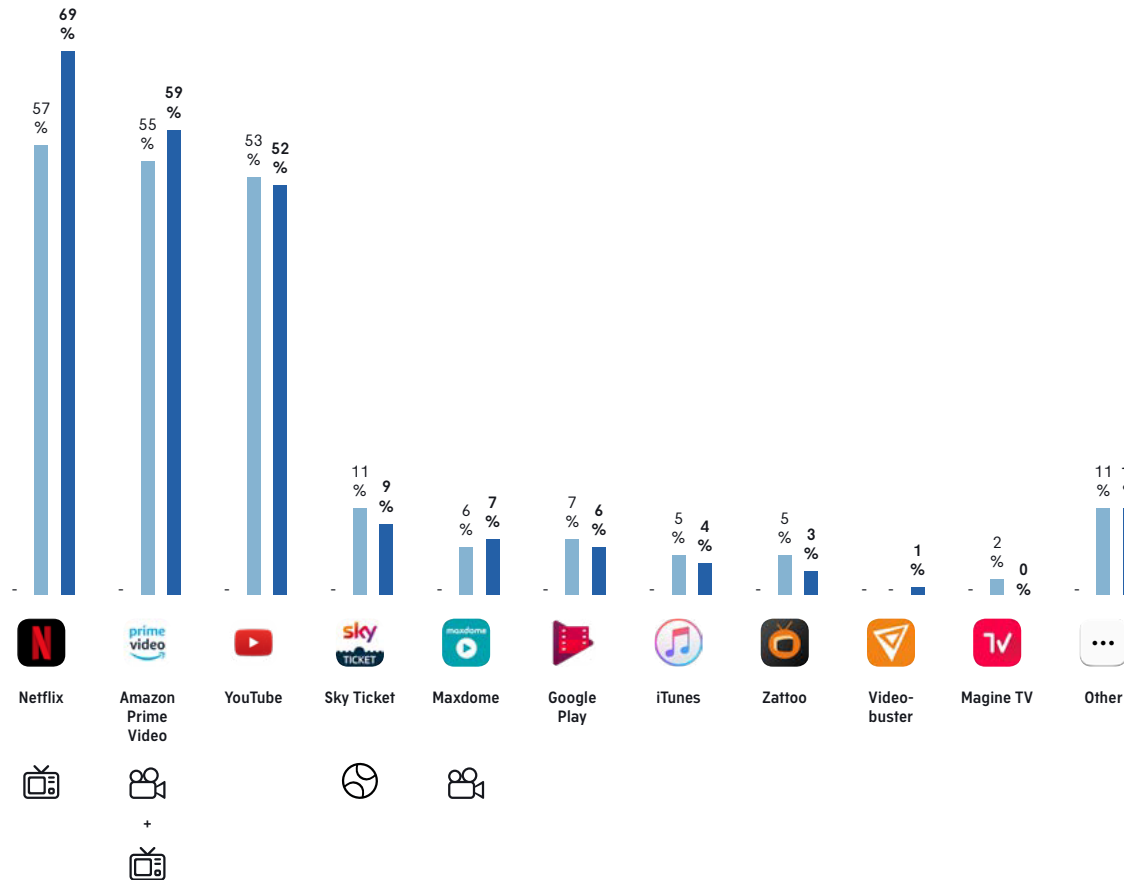
■ 2017 (Q2)
■ 2018 (Q4)
■ 2019 (Q3)



Top streaming and downloading services in Germany

[Which streaming and downloading services do Germans use to watch TV, series or movies?]

■ 2017 (Q2)
■ 2018 (Q4)
■ 2019 (Q3)



- Mainly used to watch movies
- Mainly used to watch series
- Mainly used to watch sports

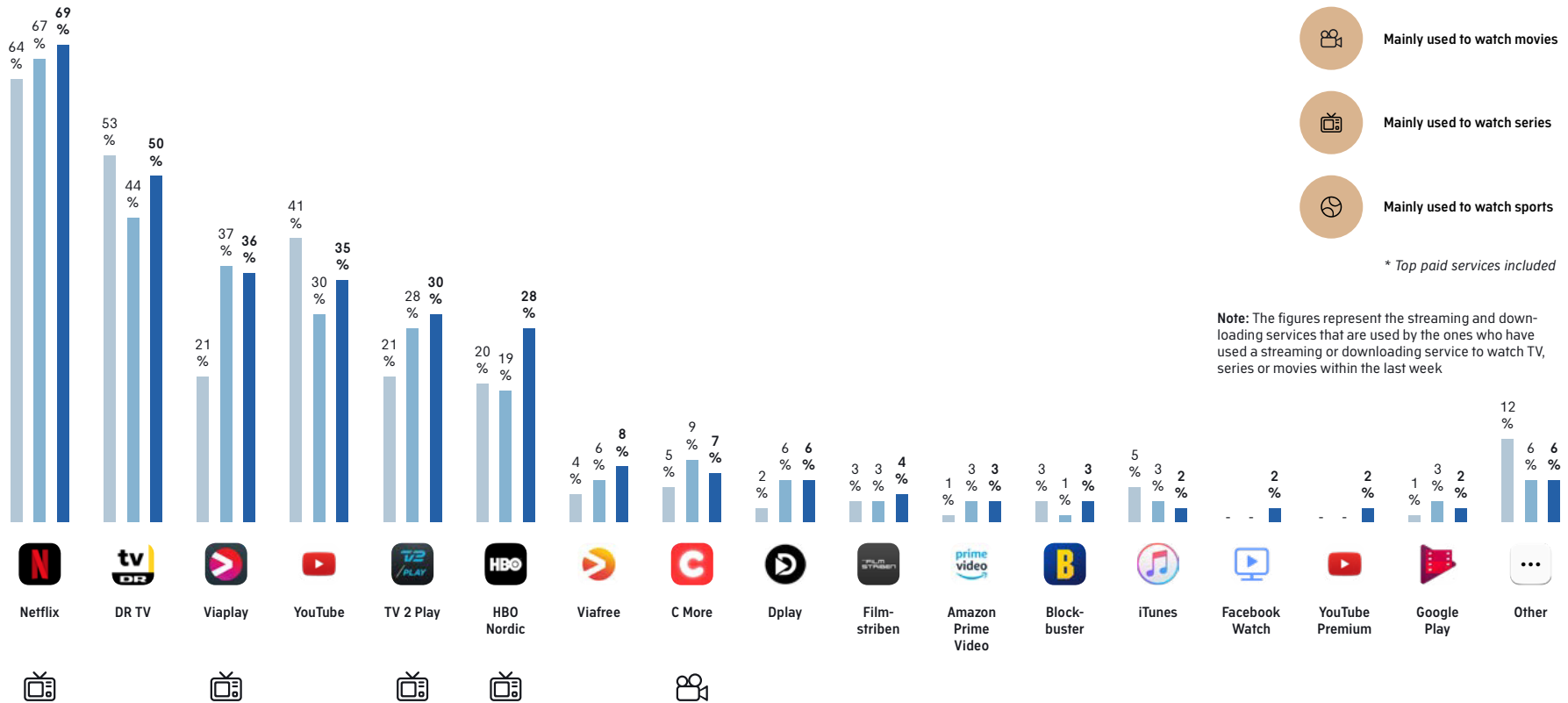
* Top paid services included

Note: The figures represent the streaming and downloading services that are used by the ones who have used a streaming or downloading service to watch TV, series or movies within the last week

Top streaming and downloading services in Denmark

[Which streaming and downloading services do Danes use to watch TV, series or movies?]

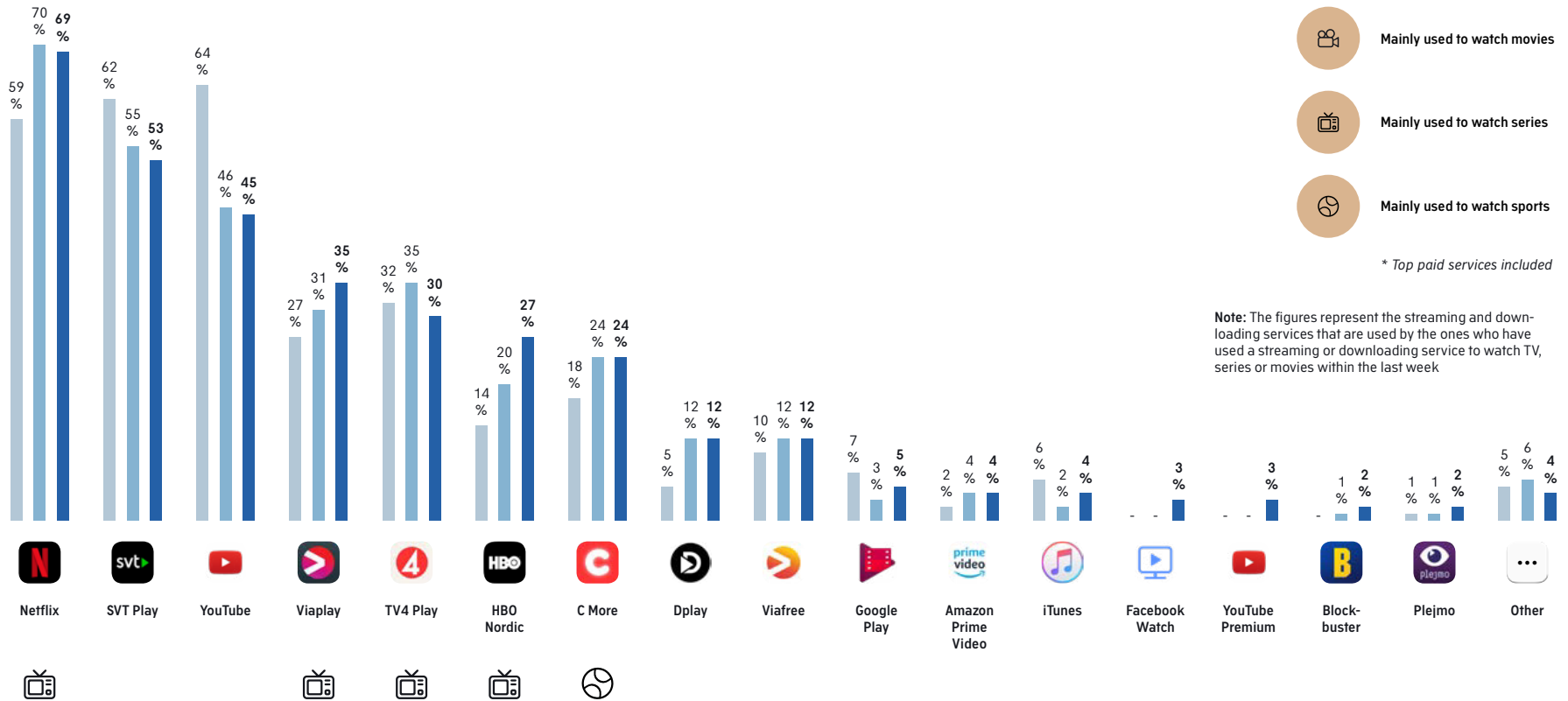
■ 2017 (Q2)
■ 2018 (Q4)
■ 2019 (Q3)



Top streaming and downloading services in Sweden

[Which streaming and downloading services do Swedes use to watch TV, series or movies?]

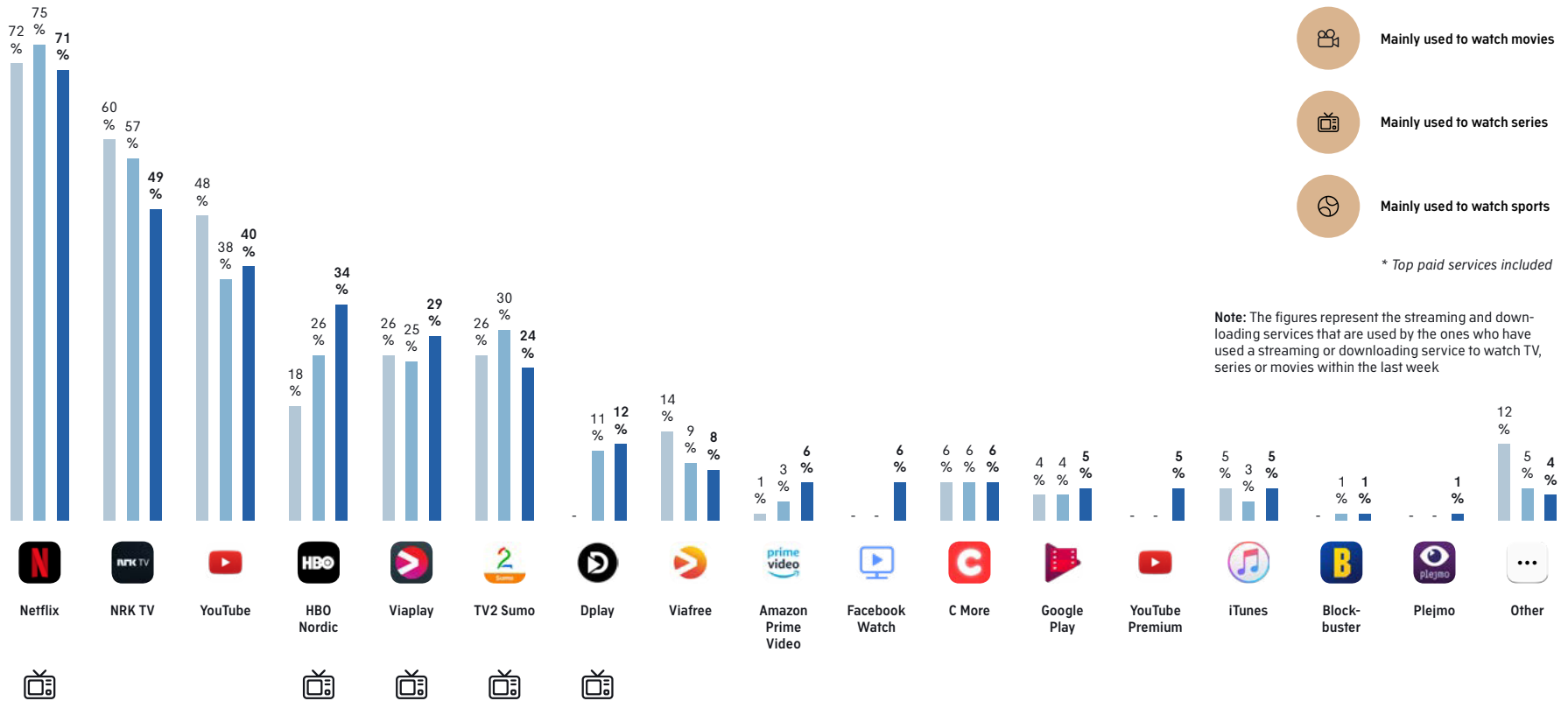
- 2017 (Q2)
- 2018 (Q4)
- 2019 (Q3)



Top streaming and downloading services in Norway

[Which streaming and downloading services do Norwegians use to watch TV, series or movies?]

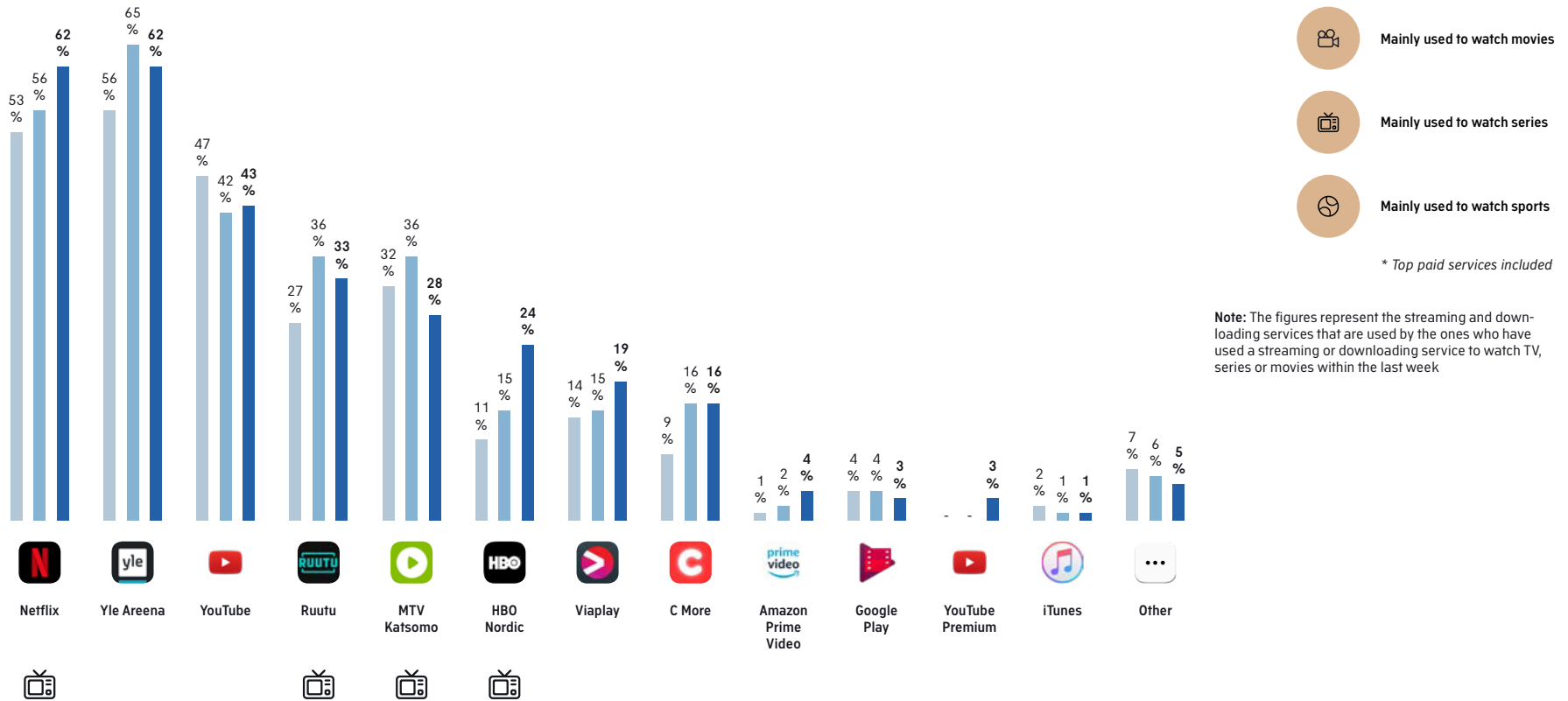
■ 2017 (Q2)
■ 2018 (Q4)
■ 2019 (Q3)



Top streaming and downloading services in Finland

[Which streaming and downloading services do Finns use to watch TV, series or movies?]

■ 2017 (Q2)
■ 2018 (Q4)
■ 2019 (Q3)



ABOUT THE STUDY

Further insights

This is just the tip of the iceberg. AudienceProject has in-depth data on the digital market. For more in-depth data about the usage of traditional TV, online video and streaming - or other digital trends, please reach out to us.

Methodology

The study is a part of AudienceProject Insights 2019. Data is collected through online surveys. The respondents have been selected from our Nordic, German, UK and US panels consisting of more than 1.5 million panelists and weighed to achieve representativity. The Disney+ chapter is based on answers from more than 6.000 respondents collected in Q4 2019. The Media usage chapter is based on answers from more than 16.000 respondents collected in Q3 2019.

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About AudienceProject

AudienceProject is a technology-based market research company founded in Denmark and operational worldwide that helps publishers, agencies and advertisers identify, build, reach and measure audiences.

AudienceProject empowers publishers, agencies and advertisers to collect and activate their own audience data, so they can create unique data offerings and show advertisers the true value of omnichannel marketing.

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