



Monetizing password sharing, Industry outlook and best practices – Survey Results

Dan Rayburn & Adobe



Survey overview

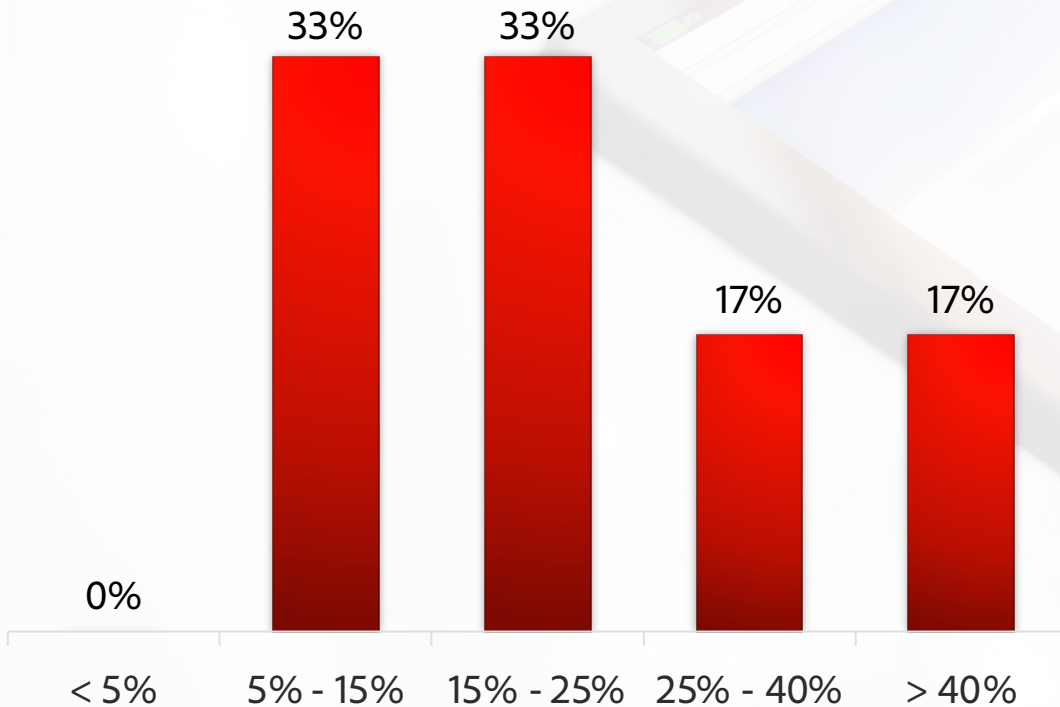
Adobe partnered with Streaming Media expert Dan Rayburn on the Industry outlook and best practices on monetizing password sharing survey



Large services have higher sharing ... Some more than 40%

Survey question: What is the magnitude of password sharing for your business?

Password sharing - Large Streaming Services



Survey Insights

Large streaming services have higher sharing

- ▶ 34% services have more than 25% sharing

Small and Mid tier services have lower sharing:

- ▶ 70% services have less than 15% sharing
- ▶ ALL of them have less than 25% sharing

Large streaming services believe acting on sharing will have positive impact ...

Survey question: What kind of business impact would your business have if you act on password sharing?

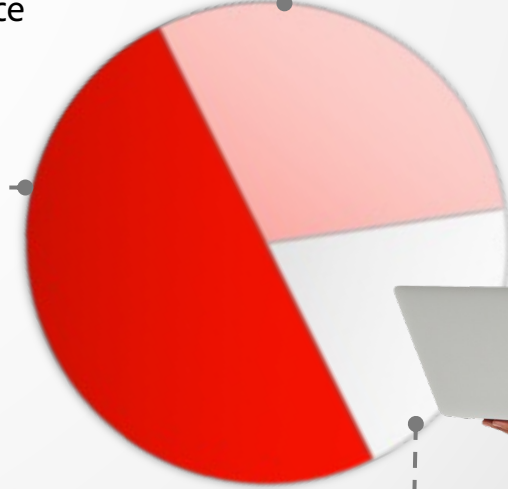
Survey Insights

- More than 50% large services say impact will be positive
- Business execs have higher "Positives" perception
 - 50% VPs & above have "Positive" perception
- Mid-tier services are mostly undecided:
 - 40% don't know, 30% both positive & negative

30%
Both positive and negative
impacts balance

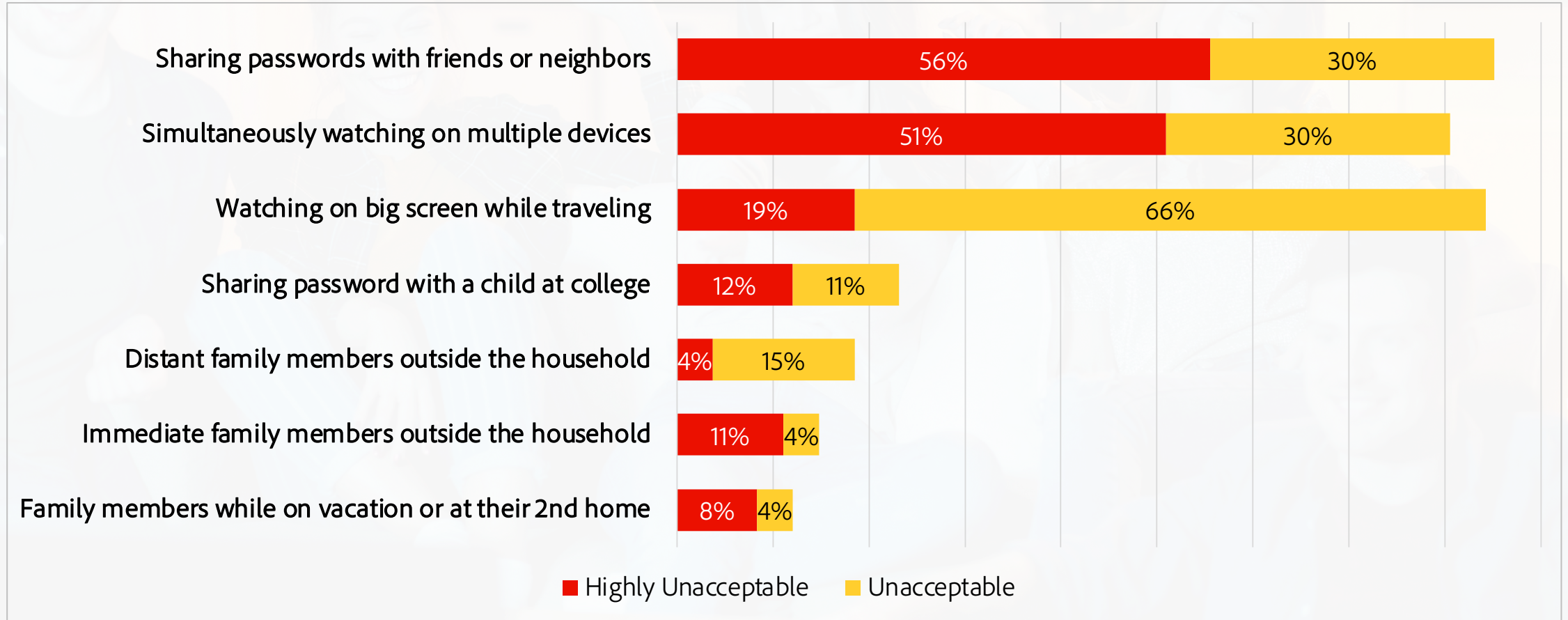
50%
Positive impacts
outweigh negative
impacts

20%
Negative impacts outweigh
positive impacts



Sharing passwords with friends & neighbors is most unacceptable ...

Survey question: Your streaming service can be accessed by borrowers, using shared credentials, in different scenarios. Please rate how "acceptable" is each scenario for your business.



Large streaming services have immediate timelines to measure & act on sharing

Survey question: Within what timeframe would your business have a system in place to measure password sharing?



Within 12 Months

- Most (67%) large streaming services will start measuring password sharing



12 – 24 Months

- Remaining (33%) large services will start measuring
- ALL large services will start acting



More than 24 Months

- Most mid & small services undecided or
- Will measure & act in >24 months

Industry expectations on features and capabilities



Top 3 actions to "Manage" password sharing

- Send personalized messages to remind T&Cs
- Change number of concurrent streams allowed
- Deny playback to shared account borrowers



Top 3 actions to "Monetize" password sharing

- Charge the account to share outside household
- Send personalized messages & upgrade offers
- Change the ad load for an account



Top 3 password sharing analytics

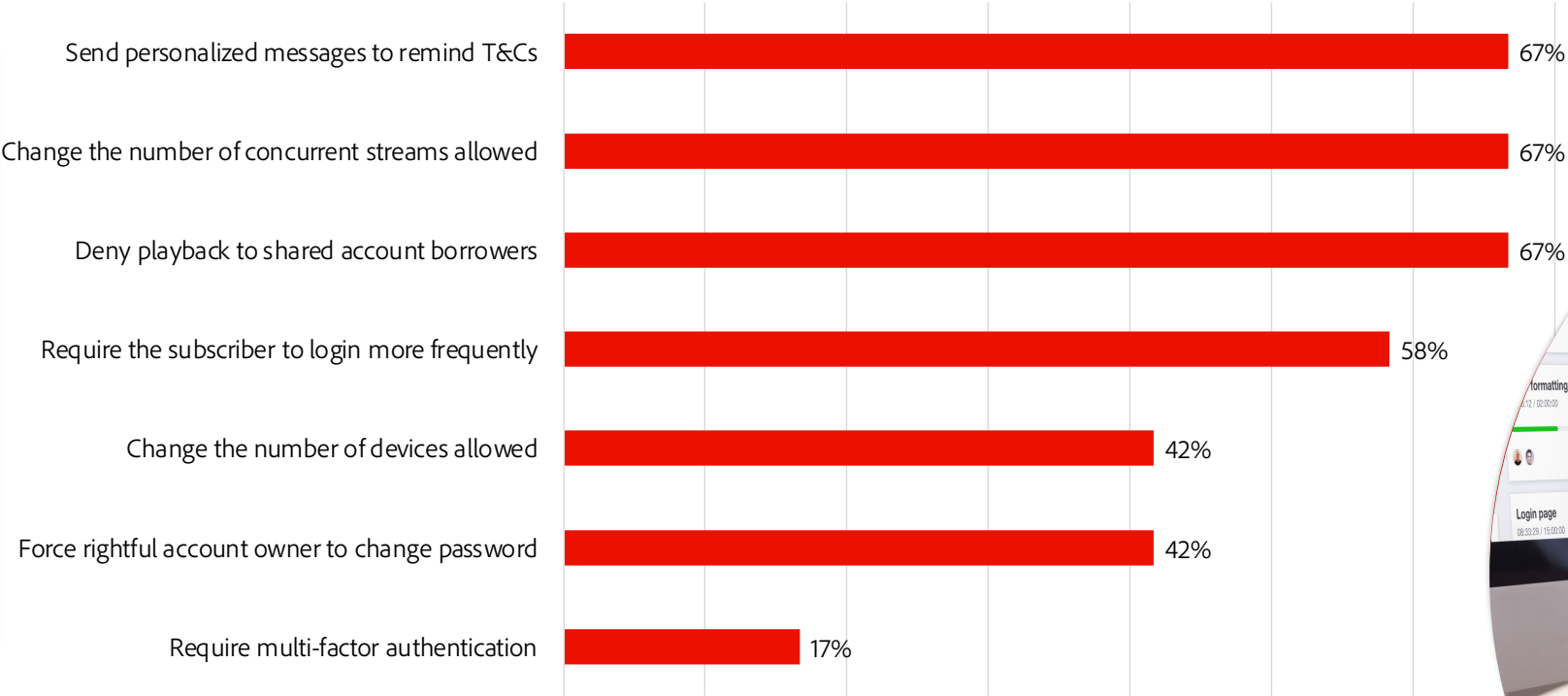
- Identifying sharing percentage by accounts
- Identifying primary account owner vs borrowers
- Identifying borrowers within segments



Actions being taken to “Manage” and “Monetize” password sharing ...

Survey question: Which of the following actions does your business take to "MANAGE" and "MONETIZE" password sharing?

Manage Password Sharing



Monetize Password Sharing

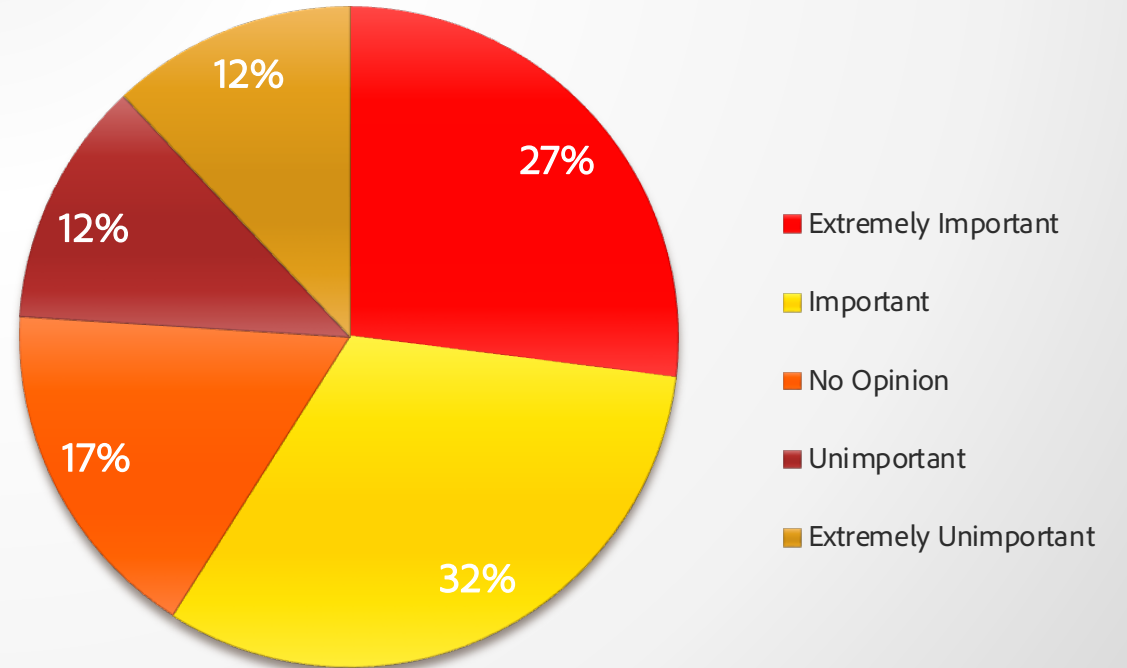


Identifying primary account owner vs borrowers is important

Survey question: How important is it for your business to identify the primary account owner vs borrowers when using your service?

Survey Insights

- More than 50% organization think it is important
- For large organizations, the percentage goes up to 66%
- For mid-level management (Sr Dir / Dir) the percentage goes up to 79%

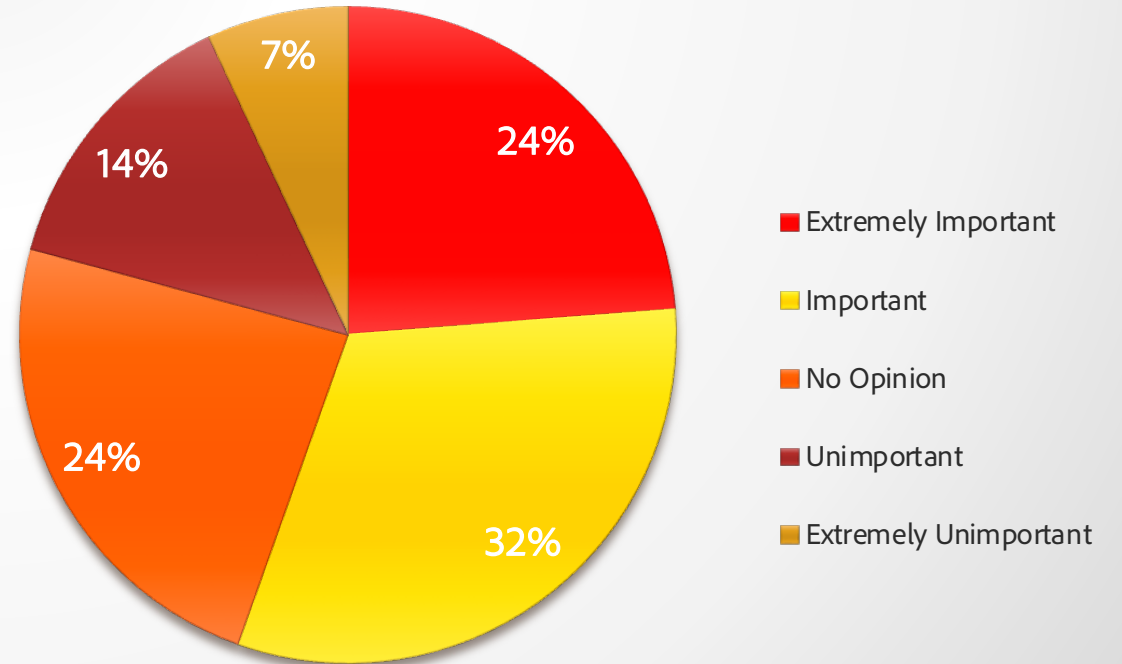


Identifying borrowers within segments also is also important

Survey question: How important is it for your business to know the % of borrowers and / or primary owners for a given segment?

Survey Insights

- More than 50% organization think it is important
- For large organizations, the percentage goes up to 72%
- For mid-level management (Sr Dir / Dir) the percentage is 79%



Thank you!

Reach out to us ...

Want access to the raw survey data?

Or want to discuss strategies to monetize password sharing?

We would love to get our specialists discuss with you and your team about possible solutions

Reach out to [Sandeep Singh \(sasin@adobe.com\)](mailto:sasin@adobe.com), Sr. Product Marketing Manager, Adobe

