



# HarrisX Streaming Webinar #2

## *Monetizing the Audience: The Streaming Revenue Playbook*

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HarrisX

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# Today's HarrisX Speakers



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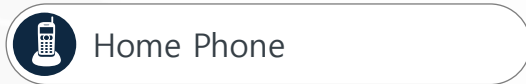
# HarrisX's **Total Communications Survey** explores longstanding trends and emerging shifts in home internet use and purchase, and tv and streaming



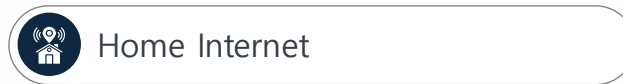
The Total Communications Survey (TCS) reaches back to 2007

- **Key performance indicators** such as consideration, perception & penetration; satisfaction metrics; willingness to recommend across service providers
- **Broad topic areas** include loyalty, path to purchase, usage, switching and likelihood to switch, and customer service
- **Deep dive** on changing TV consumption habits
- Ability to **cut data** by demographics

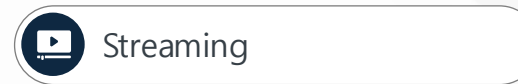
## DEVICES EXPLORED



Home Phone



Home Internet



Streaming



Television



Home Security

## COVERAGE

National, Regional

## METHODOLOGY

Online, Mobile  
20 Minute Survey

## SAMPLING

~7,500 Monthly Respondents

## AUDIENCE

Household Decision  
Makers, aged 18+

## DELIVERABLES

Monthly &  
Quarterly Options



# Total Communications Survey (TCS) dives deep into the latest in national streaming and video trends with ~100,000 respondents annually

Detailed subscriber data on **over 20 streaming apps** including:



## Live and On-Demand Content

- **Content type/genre** watched per service
- **TV channels** watched on streaming and TV
- **Favorite shows** of top apps
- **Cable TV and Live Streaming** combination and replacement
- **Sports** engagement by app
- **Vertical video** viewing, including **social media** and **micro-dramas**



## Satisfaction and Usage

- Overall **Satisfaction**
- Satisfaction with **specific features**: Navigation, Load Time, Picture Quality, Content
- Attitudes of **ads** frequency and length
- **Frequency** of app use
- **Quality of content** better/worse
- **Pricing** better/worse
- **Where** you watch (at home, car)



## Sign ups, Cancellations, and Plan Tiers

- **Customer Lifetime Value (CLV)**
- **Churn** and **Adoption**, and Subscription cycling
- **Likelihood** to sign up / cancel per service
- **Reasons** for sign up / cancel per service
- **Plan type and cost**
  - Payment cadence (monthly/annual)
  - Ad-supported vs Ad-free



## Accessing Streaming and Additional Services

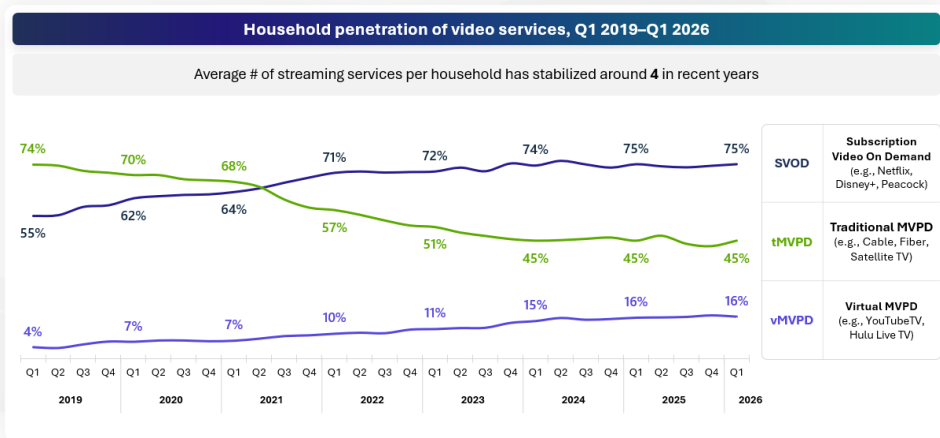
- **Ad-supported** (Pluto, Tubi, etc) and **paid** services
- **Device** used for streaming
- **Sharing subscriptions** outside household
- Subscription **cycling**
- **Gaming** subscriptions
- **Music** subscriptions

In addition to 20+ major services, household penetration and demographic profiles are available for another 26 streaming services



# Previously, in the first HarrisX Streaming Webinar...

After years of rapid growth, streaming adoption has plateaued: Is streaming fatigue driving stagnation?



MVPD = Multichannel Video Programming Distributor – i.e., live-linear television content

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For Internal Use Only – Confidential Material

- Webinar 1: **Acquisition**—what are the paths to growth?
- **Super streamers**: More likely to sign up (or rejoin)
- **Live (News) & Sports** bring in higher rates of weekly watching—be sure your ISP and mobile partners can handle the bandwidth demands
- Embrace **vertical video** users: They subscribe to more services and love watching streaming content (vertically)

You have the subscribers, where is the revenue?  
Welcome to Week 2, a focus on **Monetization**

# As the streaming industry matures and household adoption plateaus, the pressure is on to raise ARPU



1

## Raising prices

- Netflix, Hulu, HBO Max, Paramount+, etc., are among streaming companies who have all raised prices in the past year
- It's paying off in rising ARPU

*(But is it raising likelihood to churn? We discuss churn and retention in our third streaming webinar)*

2

## Introducing ad-supported tiers

- After more than a decade of experimentation, ad-supported tiers are a familiar strategy at most major services
- Amid plateauing subscriber growth and its first losses in a decade, Netflix launched its Basic with Ads service in 2022 (and Disney+ launched its own ad-supported tier a month later)

3

## Upgrades to premium tiers

- As the streaming market has exploded, premium tiers have enjoyed an expansion of available features to justify the higher expense
- These additional charges include: Live sports and news, streaming on multiple devices, HD video resolution, advanced sound quality, ability to download, and access to premium content

4

## Pulling back on streaming subsidies

The subsidized streaming (especially through bundling) of the early 2020s has ended, giving way instead to yearly price increases and ad-tiers due to ARPU anxiety:

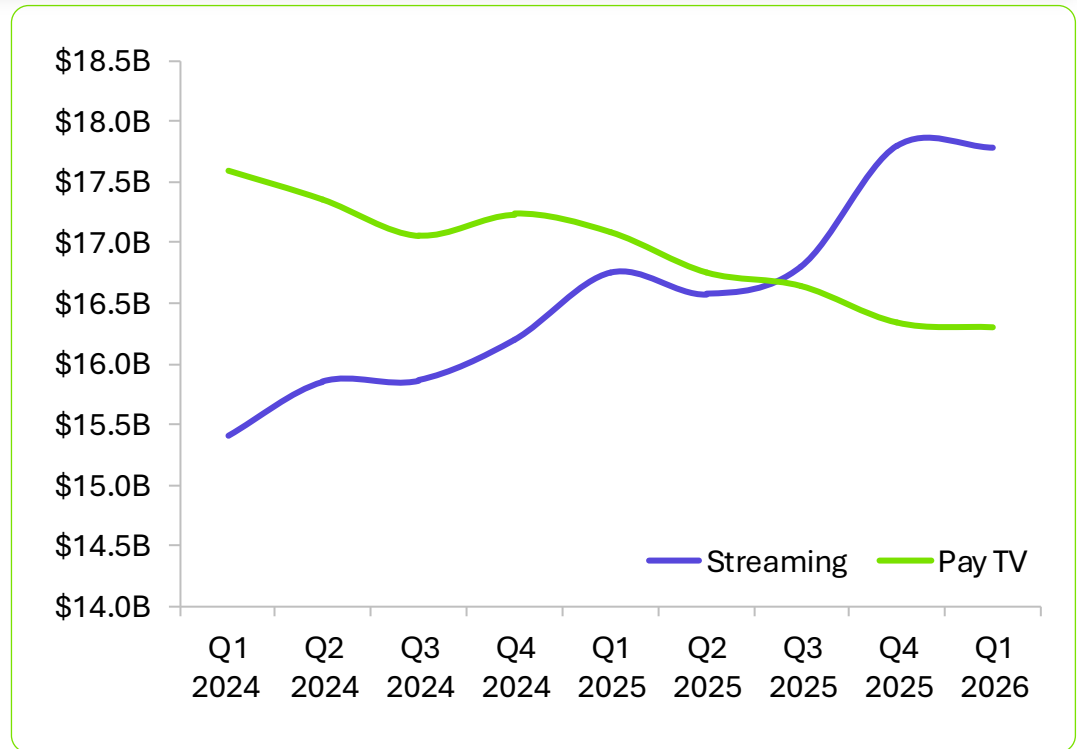
- T-Mobile ended its free Apple TV promotion in January 2026 after five years
- Verizon's free year of Disney+, launched in 2019, is now just 6 months for the bundle
- Peacock's free tier, available at service launch in 2020, became paid with ads in 2023



# Raising prices is boosting revenues: Streaming compensating for Pay TV, now almost 60% of total revenues

## Pay TV and Streaming Subscription Revenue – Q1 2024 to Q1 2026

ARPU per HH		Q1 2024	Q1 2026	Change
<b>Pay TV</b> (Live Linear, Cable)	Monthly Spend	\$100	\$92	<b>-\$8</b> <b>(-8%)</b>
	Penetration	45.3%	45.3%	<b>No change</b>
	Quarterly Revenue	\$17.6B	\$16.3B	<b>-\$1.3B</b> <b>(-7%)</b>
<b>Streaming</b> (SVODs & vMVPD, e.g., Netflix, YouTube TV)	Monthly Spend	\$52	\$60	<b>+\$8</b> <b>(+15%)</b>
	SVOD Penetration	75.6%	76.3%	<b>+0.7pt</b>
	SVOD Quarterly Revenue	\$15.4B	\$7.7B	<b>+\$2.3B</b> <b>(+15%)</b>



Despite penetration plateauing for the last two years streaming revenues keep rising: Let's explore the strategies



## Monetizing the audience: The Streaming Revenue Playbook

1

### The Ad Tier Opportunity

Ad Tiers offer a way to reduce subscription revenue loss from customers who are paying less—balancing these segments will be critical to revenue growth

2

### “Content Hoarders” and Mono-Streamers

Household penetration reveals preferences, but not priorities: The Streaming Stack Priority describes segments that reflect a service’s importance in a household’s subscription spending.

3

### Highest-Value Households

Which is a bigger revenue draw—households with just one service, or those with multiple services? Both audiences offer distinct strategies through divergent motivations.



# The Streaming Revenue Playbook: Monetizing the Audience

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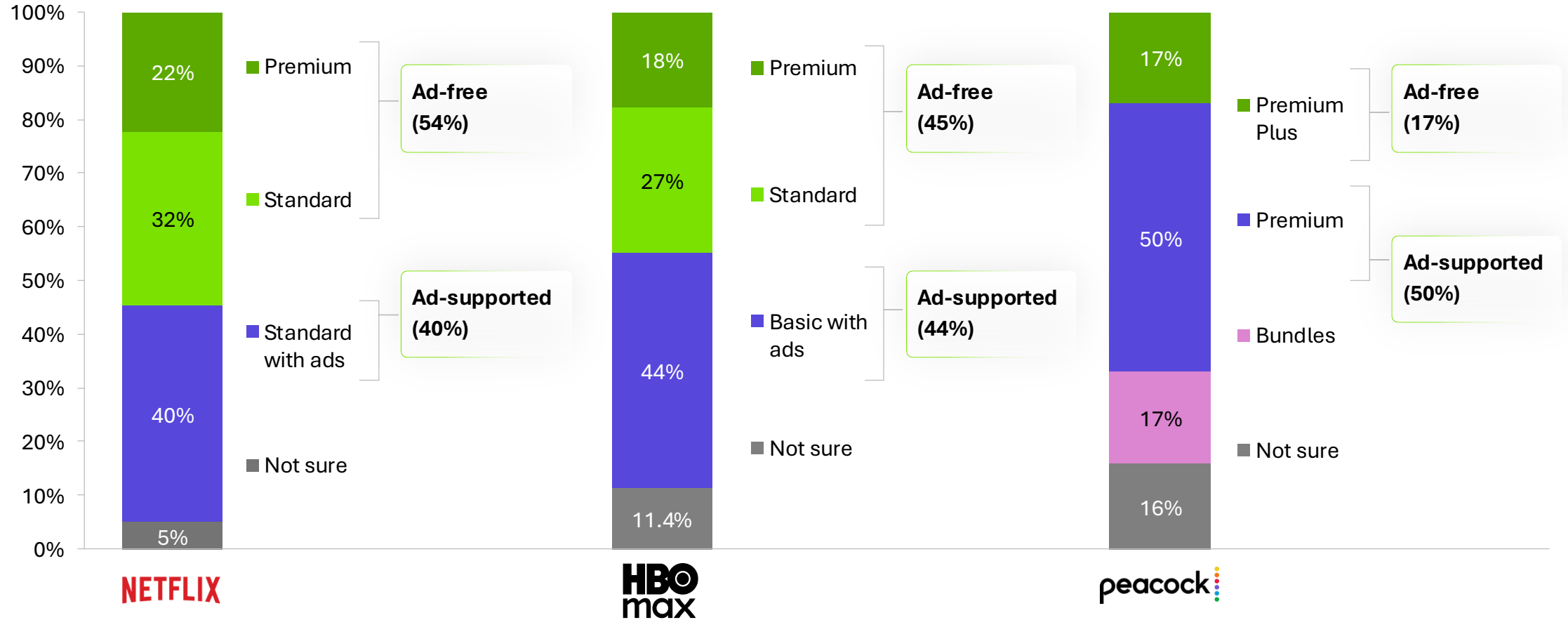
## Balancing The Ad Tier Opportunity

Ad Tiers offer a way to reduce subscription revenue loss from customers who are paying less—balancing these segments will be critical to revenue growth

# Our ad-free or ad-supported plan categories are based on specific plans: Netflix offers just one ad-supported plan, while Hulu and Disney+ have more options



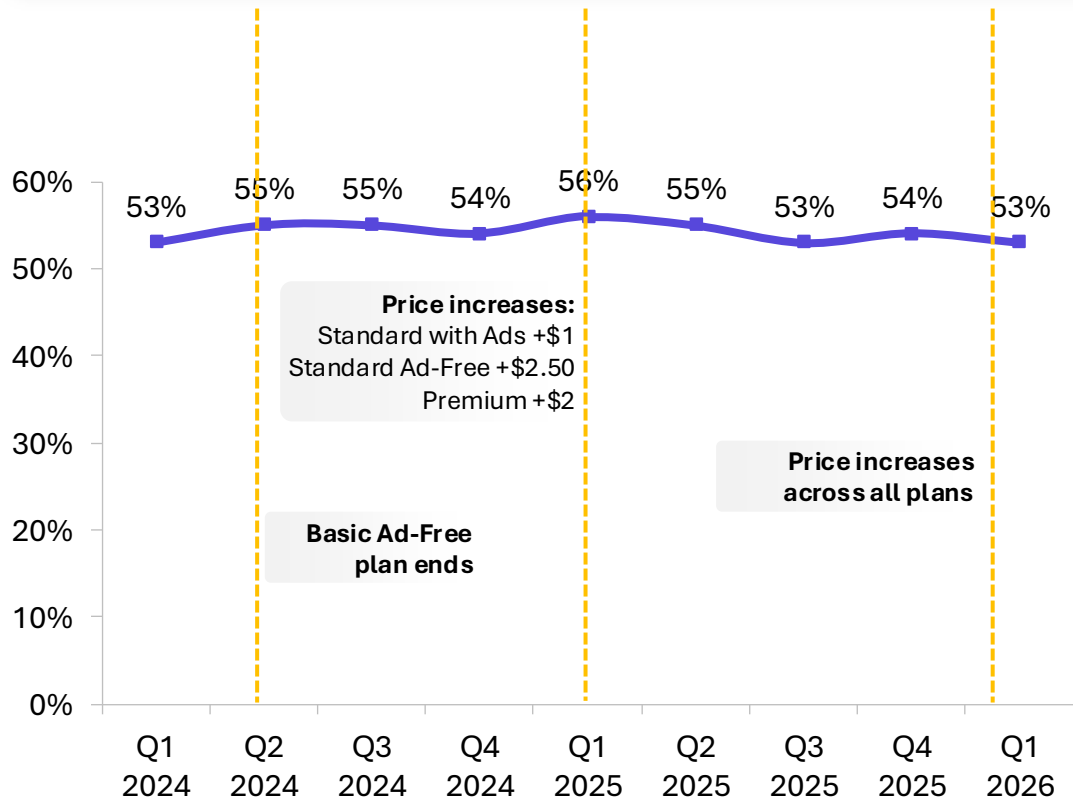
Plan type breakdown for selected streaming services – Q1 2026



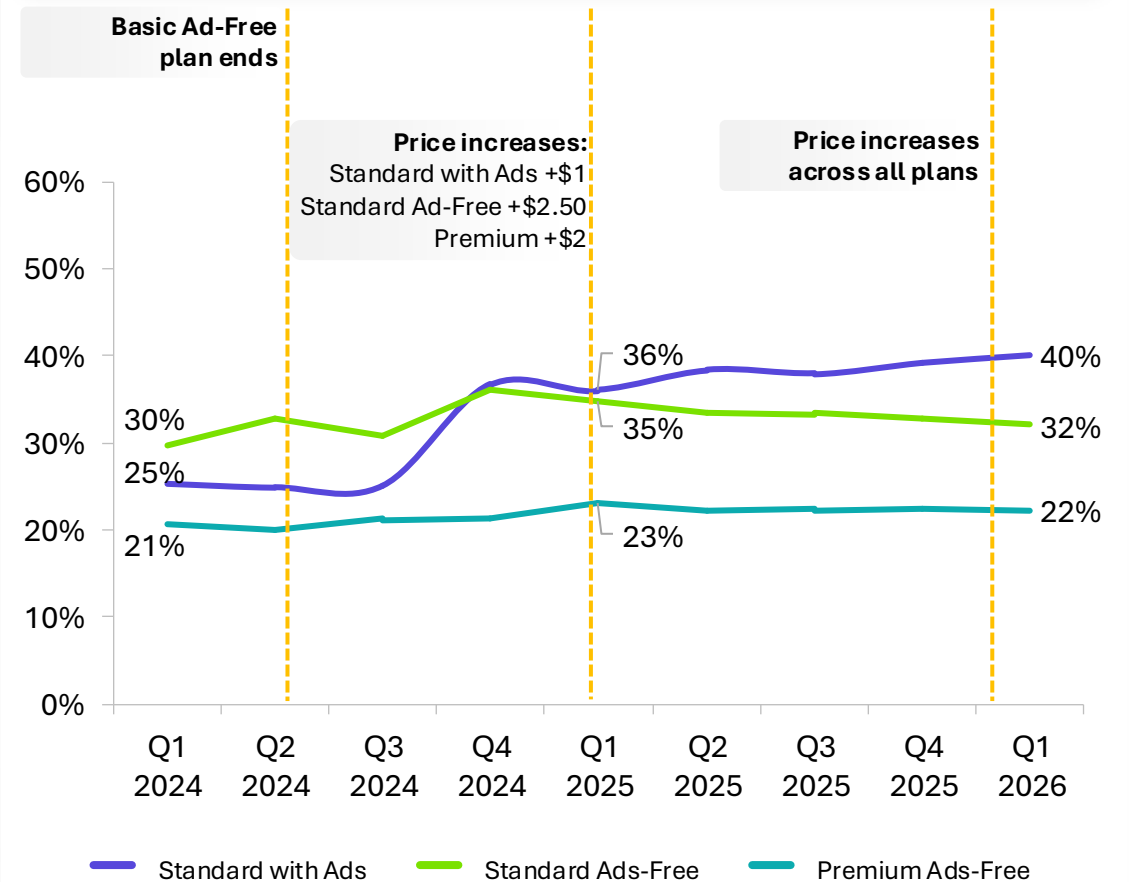
# After Netflix price increases in Q1 2025, the gap between Standard plans widened to +8pts but Premium stayed stable—this reflected likely Ad-Free downgrade, and churn for Ad-Supported seen in Netflix penetration decrease



### Netflix Overall Penetration, Q1 2024–Q1 2026



### Netflix Plan Type Share, Q1 2024–Q1 2026



Data source: HarrisX Total Communications Survey

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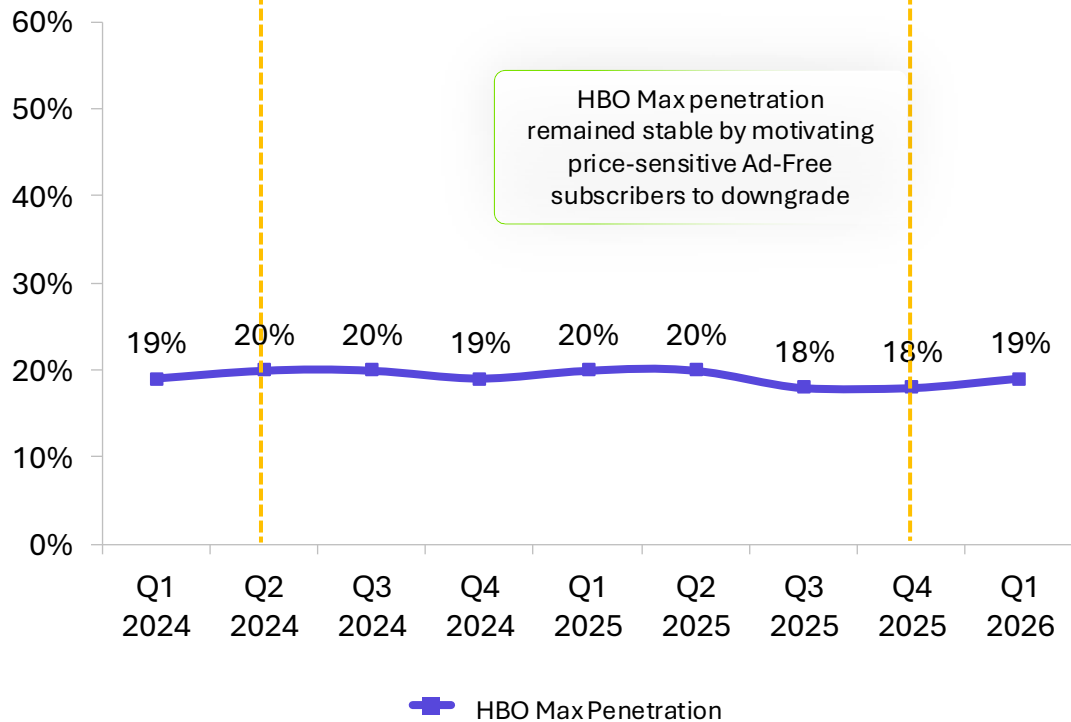


# HBO Max's Ad-Free price increases in Q2 2024 widened the gap between Basic and Standard from 1pt to 17pts by Q1 2026, while Premium grew 4pts over this time: Price increases motivated downgrades from Standard, but not from Premium plans

## HBO Max Overall Penetration, Q1 2024–Q1 2026

**Price increases:**  
 Basic with Ads \$0  
 Standard Ad-Free +\$1  
 Premium Ad-Free +\$1

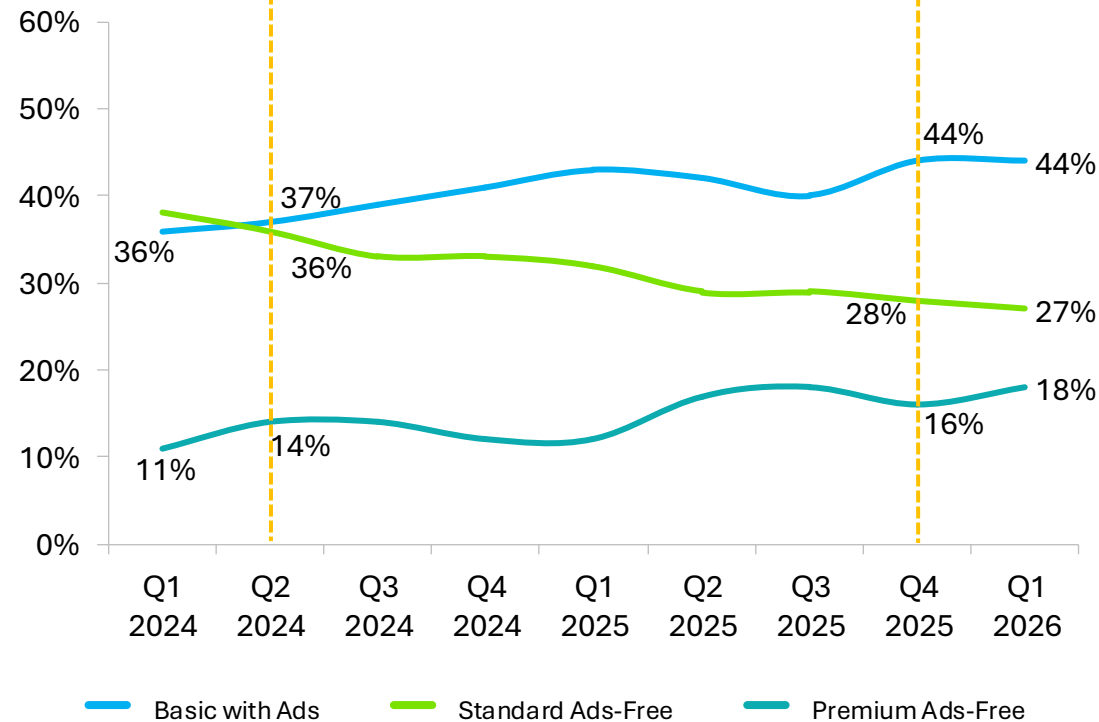
**Price increases:**  
 Basic with Ads +\$1  
 Standard Ad-Free +\$1.50  
 Premium Ad-Free +\$2



## HBO Max Plan Type Share, Q1 2024–Q1 2026

**Price increases:**  
 Basic with Ads \$0  
 Standard Ad-Free +\$1  
 Premium Ad-Free +\$1

**Price increases:**  
 Basic with Ads +\$1  
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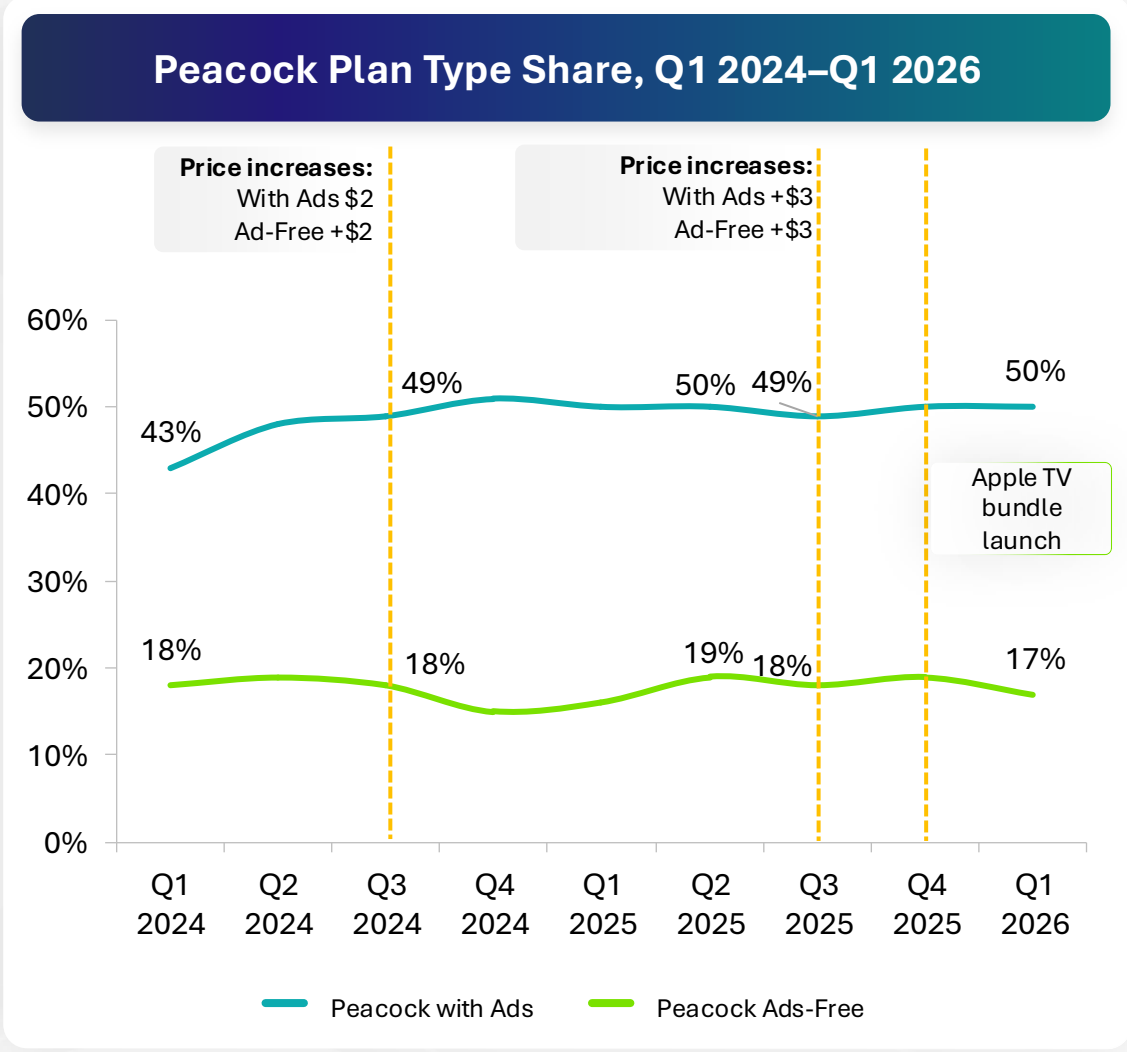
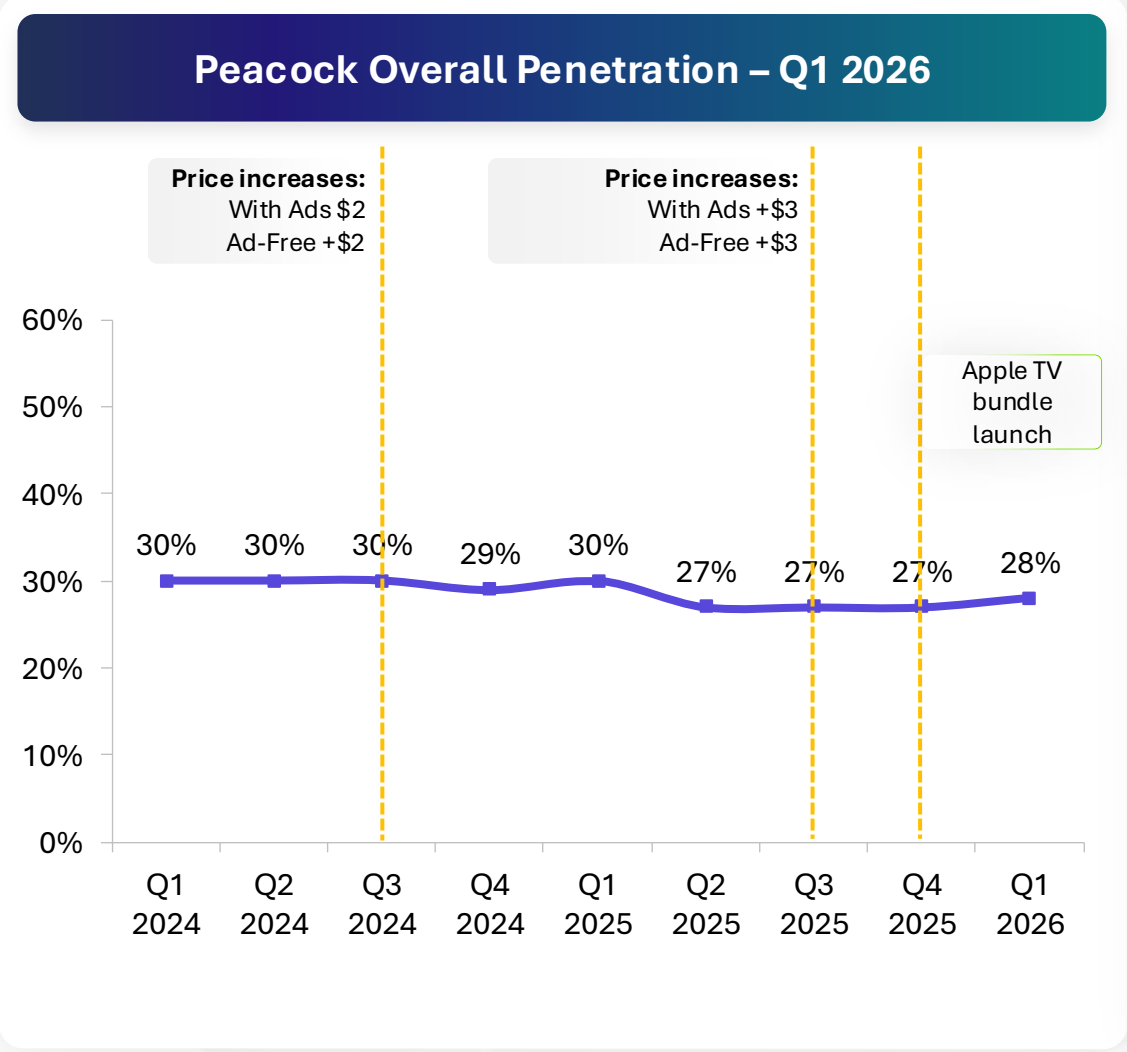


Data source: HarrisX Total Communications Survey

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# With only two plan levels, churn risk is higher: Peacock's Q3 2024 price increase saw the Ad-Supported plan +1pt by Q2 2025—accompanied by -3pts in overall penetration that was not regained by 2026

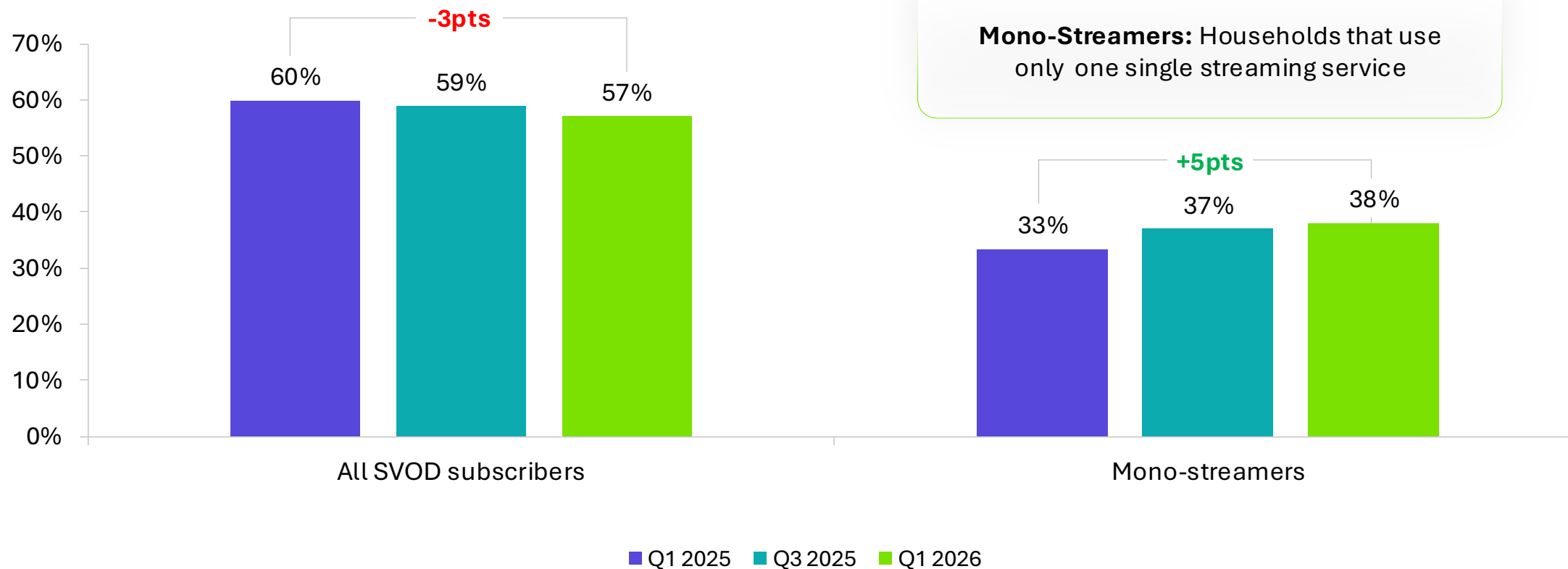


Subscribers with free Peacock subscriptions via promotions not included



# Premium plans have seen little growth, but they are becoming more popular among Mono-Streamers: They prefer one upgraded service rather than multiple basic plans

% of people with at least one ad-free subscription – Q1 2025–Q1 2026





# Premium plans are losing their luster as streaming stacks expand and price increases become an annual ritual—focus on nudging, rather than disrupting



## More plan levels? More ways to avoid churn

Subscribers on premium plans don't tend to be moved by price increase, but churn risk is present for those who are in other levels—by creating three rather than two plan levels, the middle can downgrade rather than churn out when price increases pinch.



## Nudges rather than spikes: The movement between plans

Price increases, now annual, push subscribers to either downgrade (if available) or churn out. Blanket price increases are disruptive, but selective increases on higher tiers can move higher spending users up and more price-sensitive users down, rather than out.



# The Streaming Revenue Playbook: Monetizing the Audience

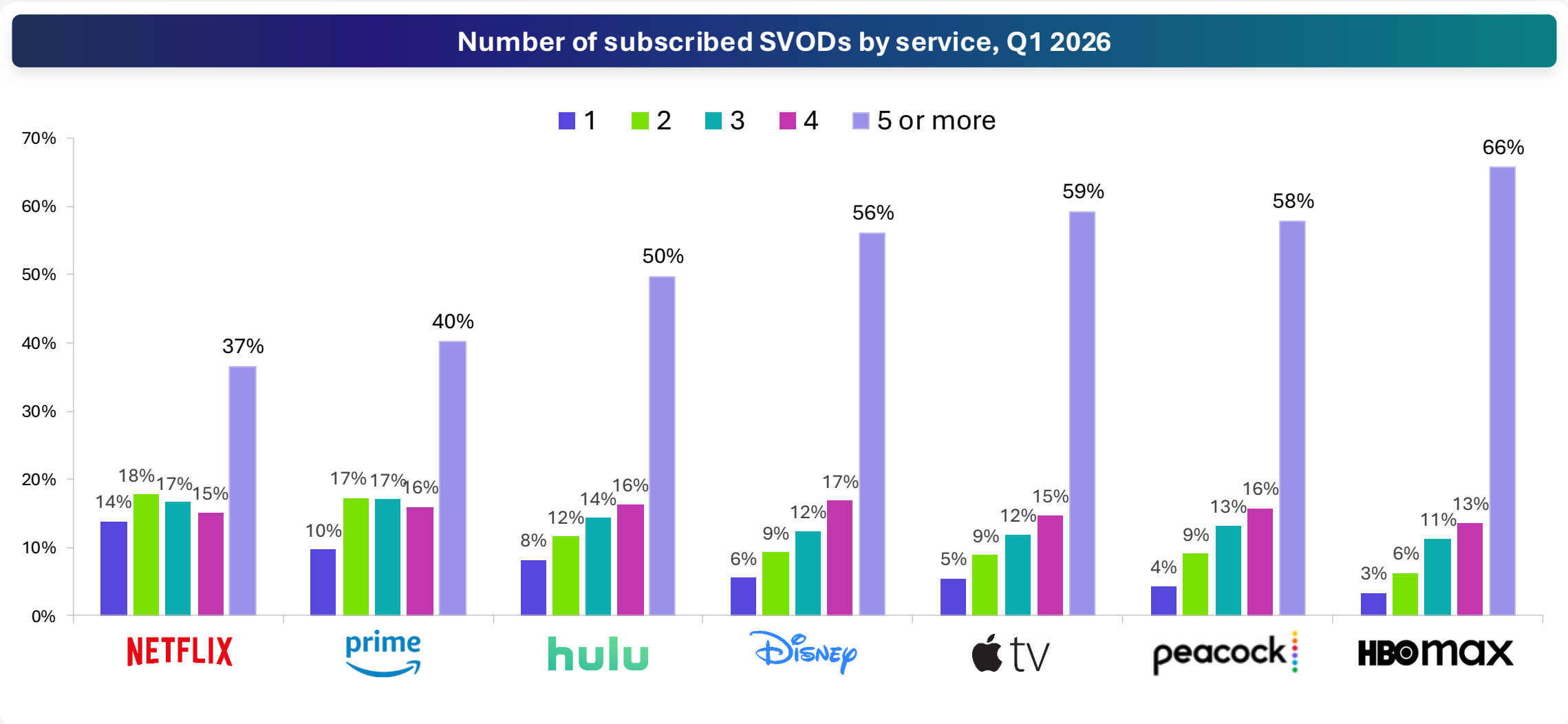
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## The “Content Hoarder” Effect and the Mono-Streamers

Penetration reveals preferences, but not priorities: The Streaming Stack Priority describes segments that reflect a service’s importance in a household’s subscription spending.

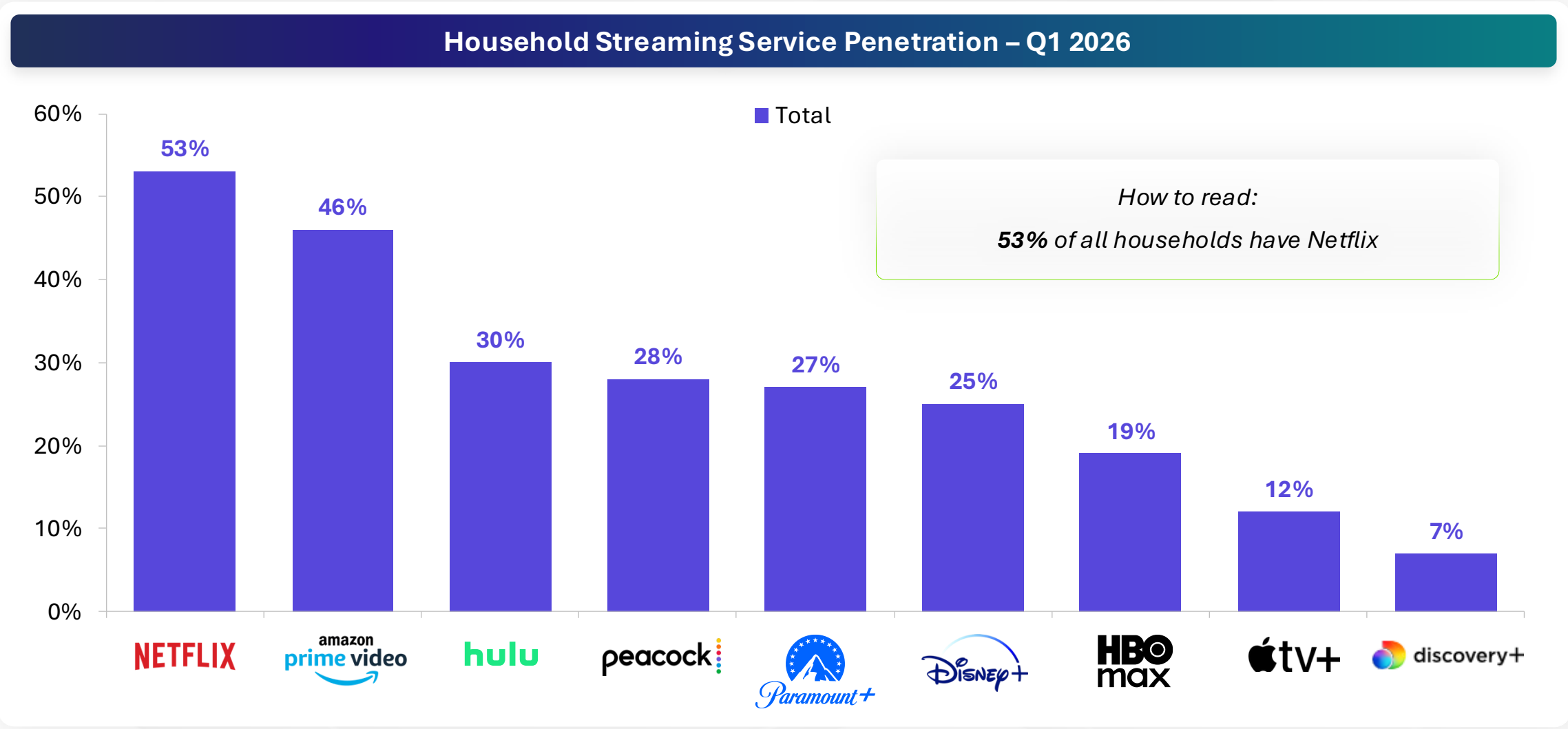


# 50% or more subscribers at major SVODs to have 5 or more services: Content hoarders are the norm, and Mono-Streamers, the subscribers with just one service, are the exception





# Streaming services exist in an ecosystem where they expect to be one among several subscriptions, as reflected in penetration data—but if users could choose only one, which would it be?



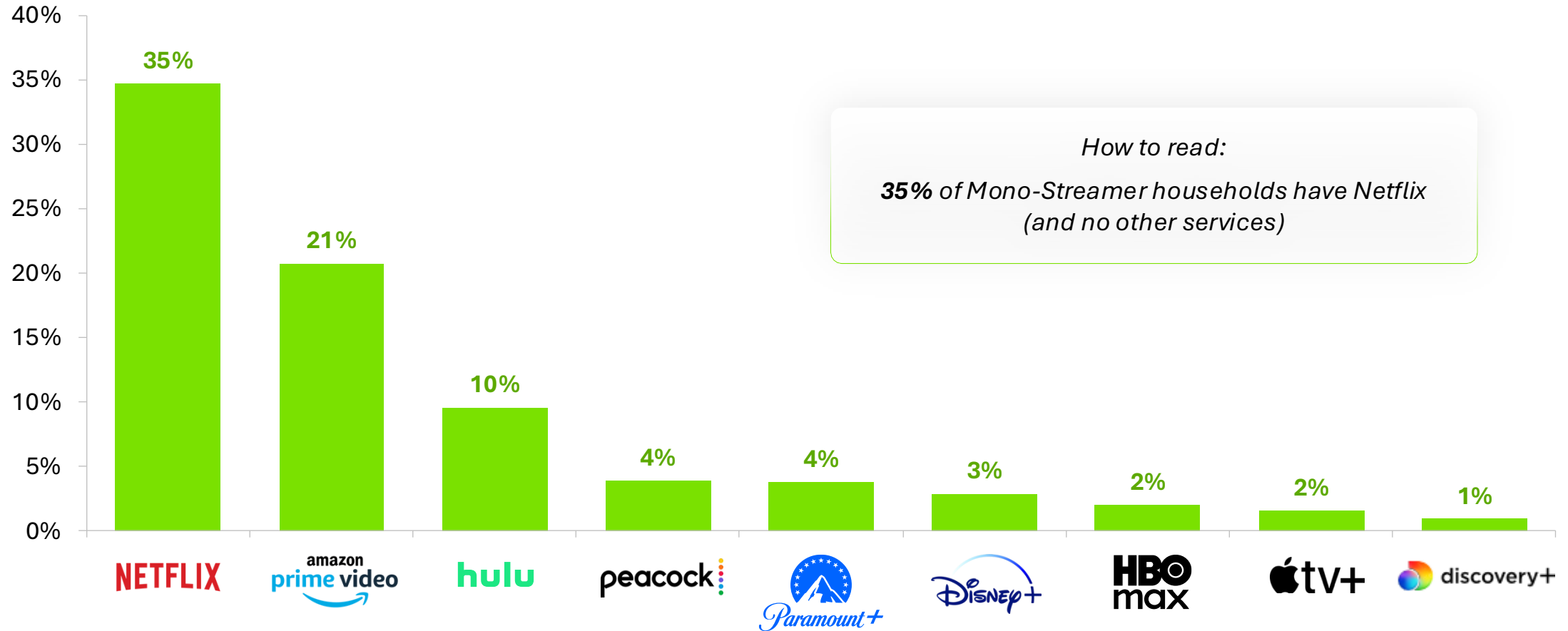
Data source: HarrisX Total Communications Survey

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# Mono-Streamers reveal the most important services to subscribers with limited time or money—the long tail trailing behind Netflix and Amazon reflects the rarity of being the one and only service



Household Streaming Service Penetration, Mono-Subscription – Q1 2026



Data source: HarrisX Total Communications Survey

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**We can see that very few services are #1 for a household, even for very popular services.**

**But what about #2, #3, and beyond?**

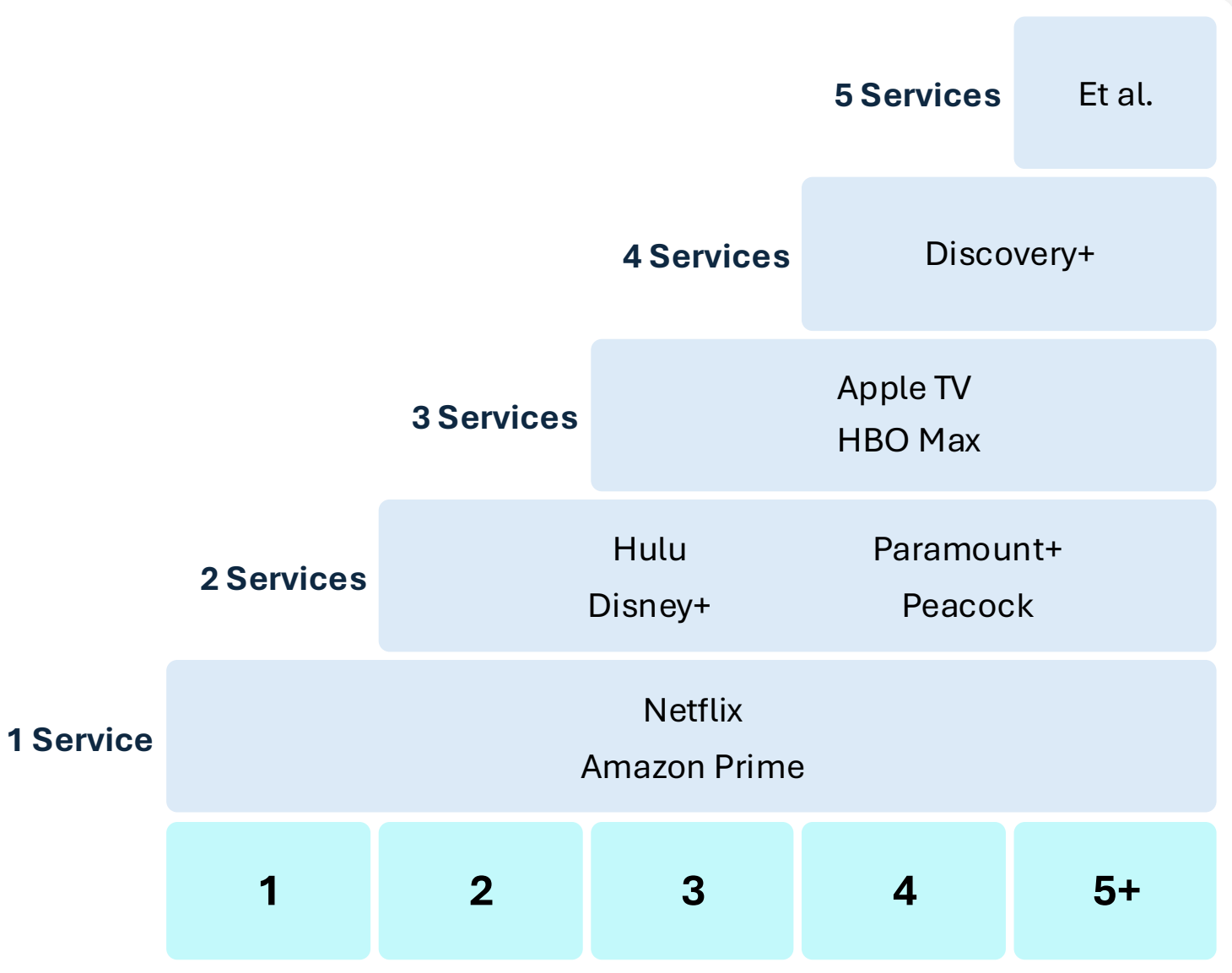
**The Streaming Stack Priority shows us which services are prioritized based on the number of subscriptions one has.**



# The Streaming Stack Priority shows the services that become more popular at varying sizes of streaming stacks

So many streaming choices, but with limited time and money: The Streaming Stack Priority ladder shows us **which services are prioritized** based on the total number of subscriptions

**How to read:** For those with **just 1 service**, Netflix or Amazon Prime tend to occupy that slot. For those **with 2 services**, Hulu, Disney+, Paramount+, and Peacock have the best chance of being included.





## The Streaming Stack Priority reflects the valuing of Quantity and Quality as the number of subscriptions increases

- **Mono-streamers:** With just one service, the focus is on having the largest catalog
- **Duo streamers:** It's a 4-way tie between well-established and trusted brands in entertainment with deep inventories of studio films and network TV
- **Trio streamers:** Prestige television choices join the stack—fewer, but very well-regarded and unique options
- **4 (and above) streamers:** Subscription stacks make room for services that deliver niche content to a devoted fanbase

Streaming Stack Priority	Streaming Service	Quantity: Number of Titles	Quality: % of titles rated 8+ on IMDB (out of 10)	Streaming Stack Category
1	Amazon Prime Video	26,380	9%	Largest Libraries
	Netflix	7,746	15%	
2	Disney+	4,625	18%	Familiar Favorites & Trusted Providers
	Hulu	3,049	22%	
	Peacock	1,948	19%	
	Paramount+	1,595	16%	
3	Apple TV	316	29%	Prestige Programming
	Max	3,600	25%	
4+	Discovery+	1,847	8%	Niche & Specialty



# There's only one #1—but your niche content might be perfect at #4



## Know your number in the Streaming Stack Priority

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There's only one #1, but fortunately, most streamers are more than Mono: By identifying your place in a household's subscription spending, the Streaming Stack Priority can help you determine the segment you are best at serving—and how to maximize their engagement.



## Moving up or holding your position in the Streaming Stack: Both can work

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Moving up in the Streaming Stack? Seek greater name recognition and expanded libraries through bundling and combining with other services. Hold your position to defend against churn? Deepen (not broaden) your catalog and position yourself as the home for fans.



# The Streaming Revenue Playbook: Monetizing the Audience

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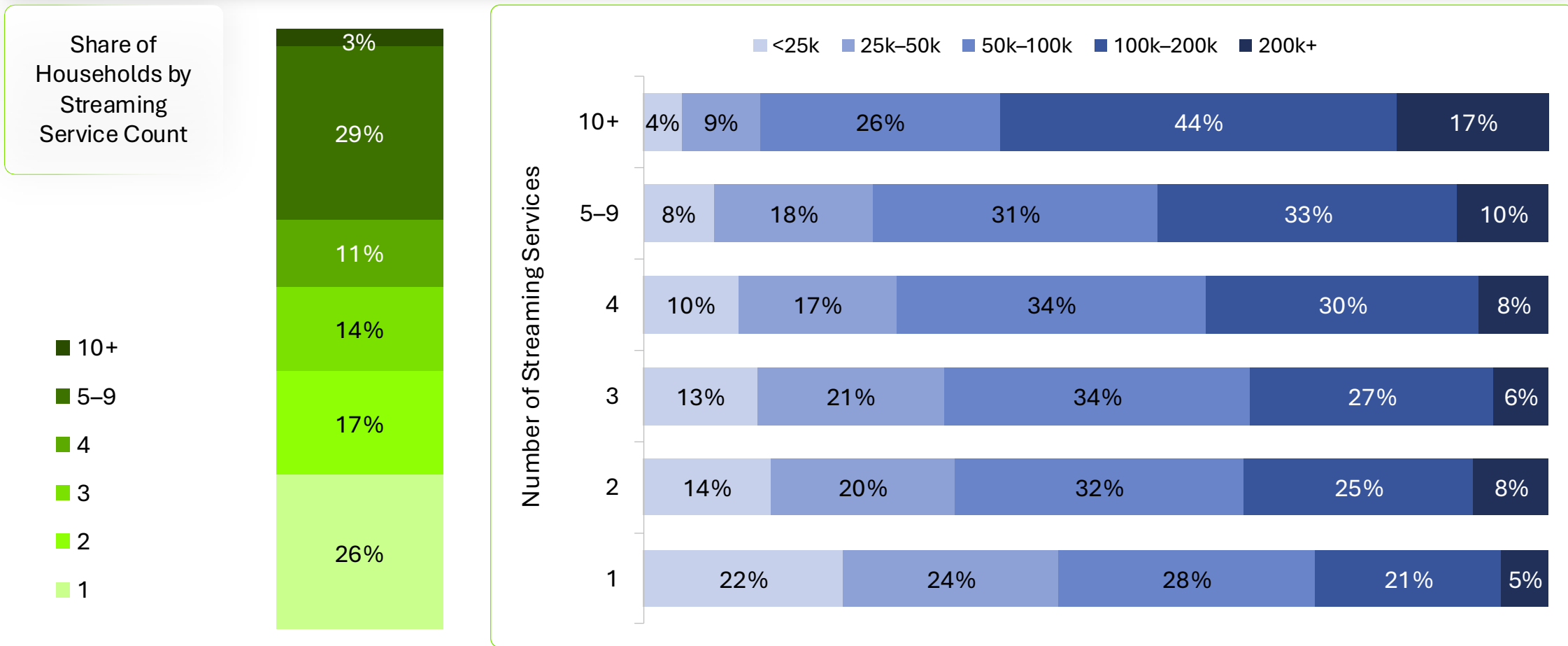
## Highest-Value Households

Which is a bigger revenue draw—households with just one service, or those with multiple services? Both audiences offer distinct strategies through divergent motivations.



# \$100k+ households dominate the heaviest streaming segment (10+), but the \$50–100k and \$100–200k groups are nearly equal in the 5-9 category: A larger rotation of streaming services is an essential entertainment strategy, not a luxury

## Household Income Share, by Streaming Service Count – Q1 2026



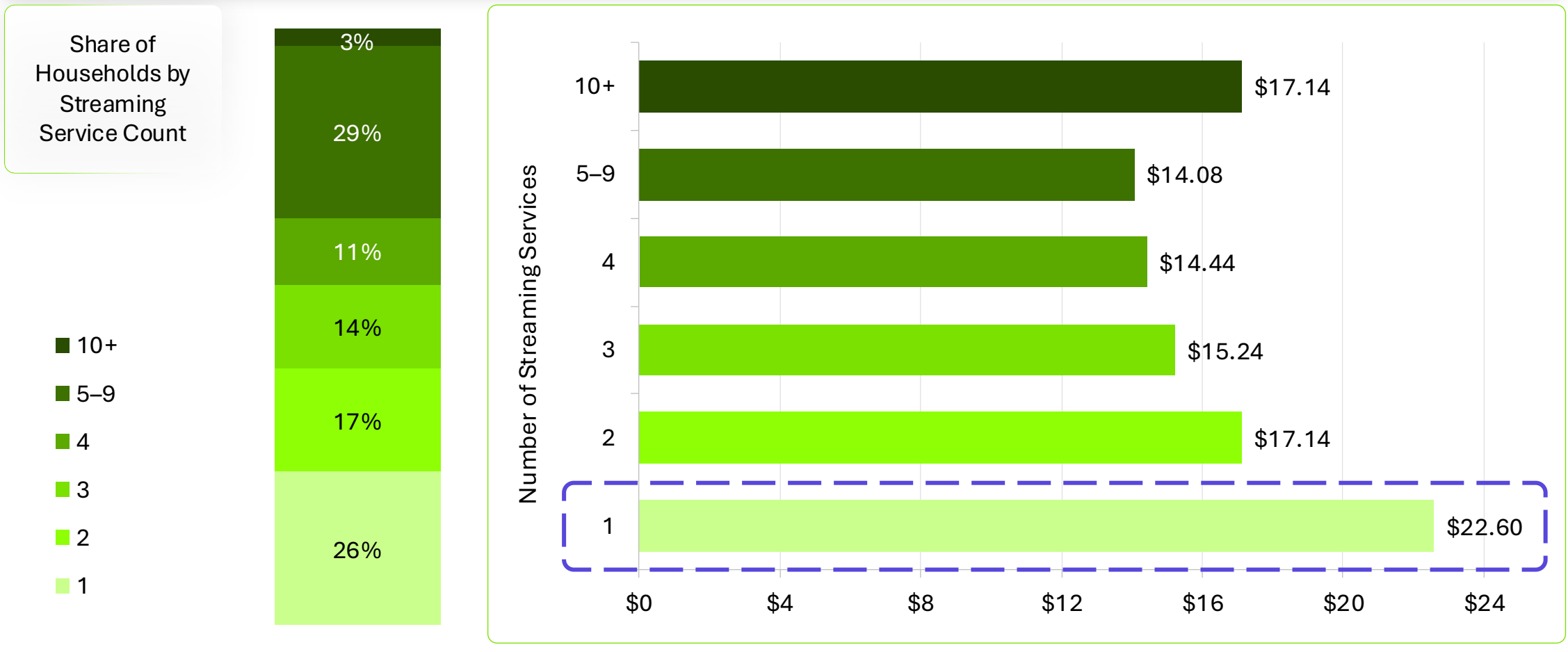
Data source: HarrisX Total Communications Survey

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# A quarter of streaming households only use one service, and these Single-Service customers have the highest ARPU out of any other segment: When you have only one service, it is worth it to have a premium, ad-free experience

### Average Cost per Service, by Streaming Service Count – Q1 2026



Data source: HarrisX Total Communications Survey

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## Two prime audiences, two distinct strategies



### Mono-Streamers



Households with **just one service** should not be overlooked:

When one commits to using only a single source of entertainment, they invest to make it the best experience it can be with premium plans



### Super-Streamers



Higher income households may be holding **5 or more services**, but they are not paying a premium cost for each of them:

Counterintuitively, these customers want multiple cheap services, viewed more as add-ons that combine than standalone one-stop-shops



# It's not just about more subscribers—it can also be finding out who finds your service more valuable

There are many ways to get to more revenue—start by finding out where your service fits in with the others in a stack



## Ad Tier Opportunities

### HarrisX recommends:

- **More plan tiers** to allow for downgrading during price increases
- Use **varying price increases** focused on more expensive plans to avoid churning out price-sensitive users
- **Nudge** higher spenders towards premium tiers for better value, or price-sensitive users to go down a tier



## Content Hoarders & Mono-Streamers

### HarrisX recommends:

- Find your position in the **Streaming Stack Priority** to identify the segment you are best at serving
- **Move up** in the Streaming Stack by expanding libraries or joining with other services
- **Defend your position** against losses by deepening catalogs and attracting niche fans



## High-Value Households

### HarrisX recommends:

- **Mono-Streamers** are valuable because they invest in a single service to make it an excellent viewing experience
- Higher income households with **5+ services** want multiple cheaper services that combine to form a broader viewing experience

**Webinar #3 (June 12): RETENTION**  
Highest CLVs, Content & Loyalty, Churn Prediction  
[streaming@harrisx.com](mailto:streaming@harrisx.com)



# Interested in what HarrisX's streaming and video practice can do for you?



**Contact us:**

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**We are located in**

**New York and DC.**



# Thank you

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