



# HarrisX Streaming Webinar #1

*Breaking through the plateau: How to re-ignite growth*

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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 7,500 monthly respondents

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

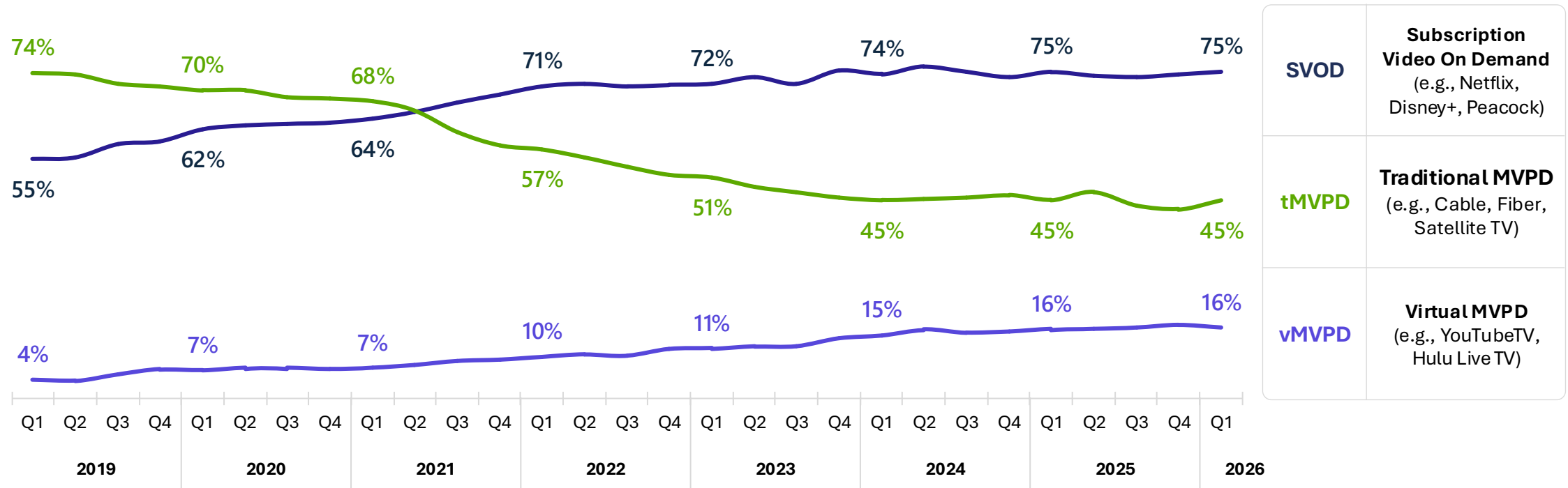
In addition to 20+ major services, household penetration and demographic profiles are available for another 26 streaming services



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

## Household penetration of video services, Q1 2019–Q1 2026

Average # of streaming services per household has stabilized around 4 in recent years



<b>SVOD</b>	<b>Subscription Video On Demand</b> (e.g., Netflix, Disney+, Peacock)
<b>tMVPD</b>	<b>Traditional MVPD</b> (e.g., Cable, Fiber, Satellite TV)
<b>vMVPD</b>	<b>Virtual MVPD</b> (e.g., YouTubeTV, Hulu Live TV)

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



# Breaking through the plateau: How to re-ignite growth

1

## The Reality of Subscriber Overlap: Super-Streamers

Most streaming households now subscribe to multiple platforms simultaneously. At what point do we call them a super-streamer? Let's explore this group as strategic acquisition assets.

2

## The New Content Battleground: Live & Sports

Demand for live programming and sports continues to rise, making it one of the most powerful drivers of subscriber acquisition and engagement in an increasingly crowded streaming ecosystem.

3

## Emerging Formats that could Unlock Growth: Vertical Video

Vertical video storytelling is here to stay—and is a part of the streaming landscape. At the intersection of vertical video and super streaming is subscriber growth.



# Breaking through the plateau: How to re-ignite growth

1

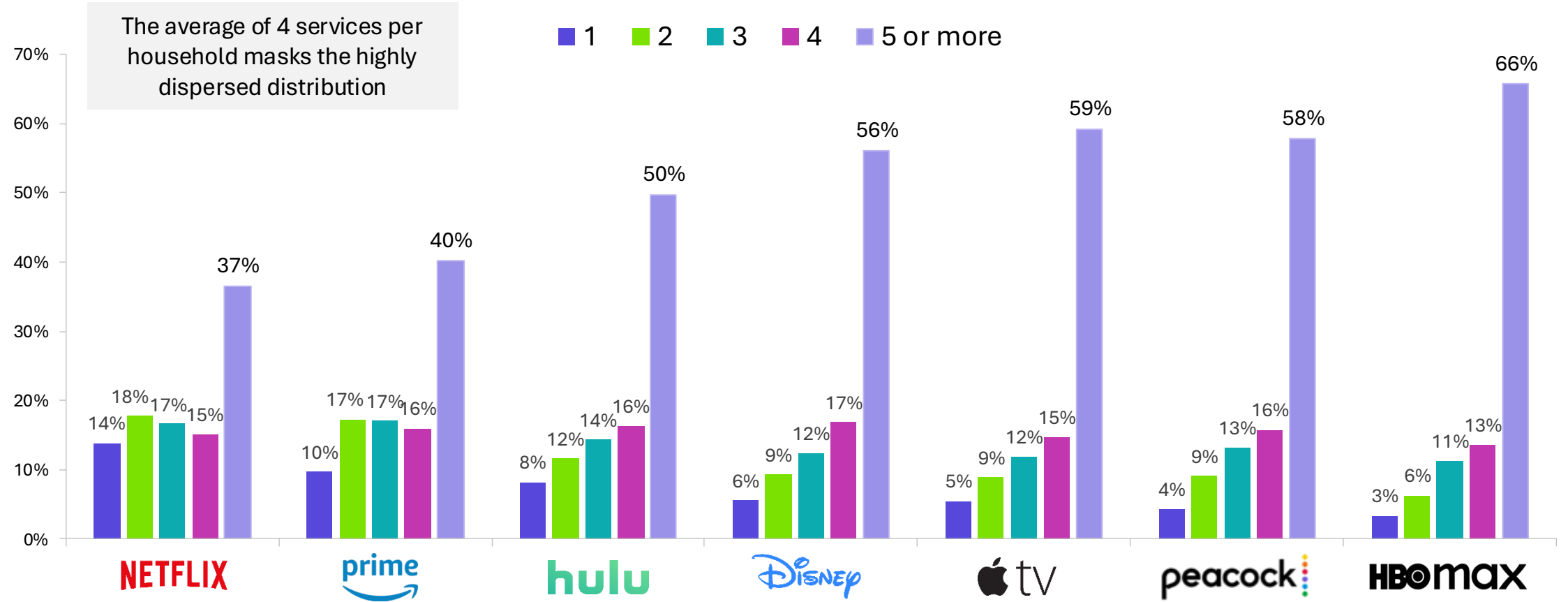
## The Reality of Subscriber Overlap: Super Streamers

Most streaming households now subscribe to multiple platforms simultaneously. At what point do we call them a super-streamer? Let's explore this group as strategic acquisition assets.



# Consider the super streamer: 50% or more subscribers at major SVODs have 5+ subscriptions. Do they behave differently?

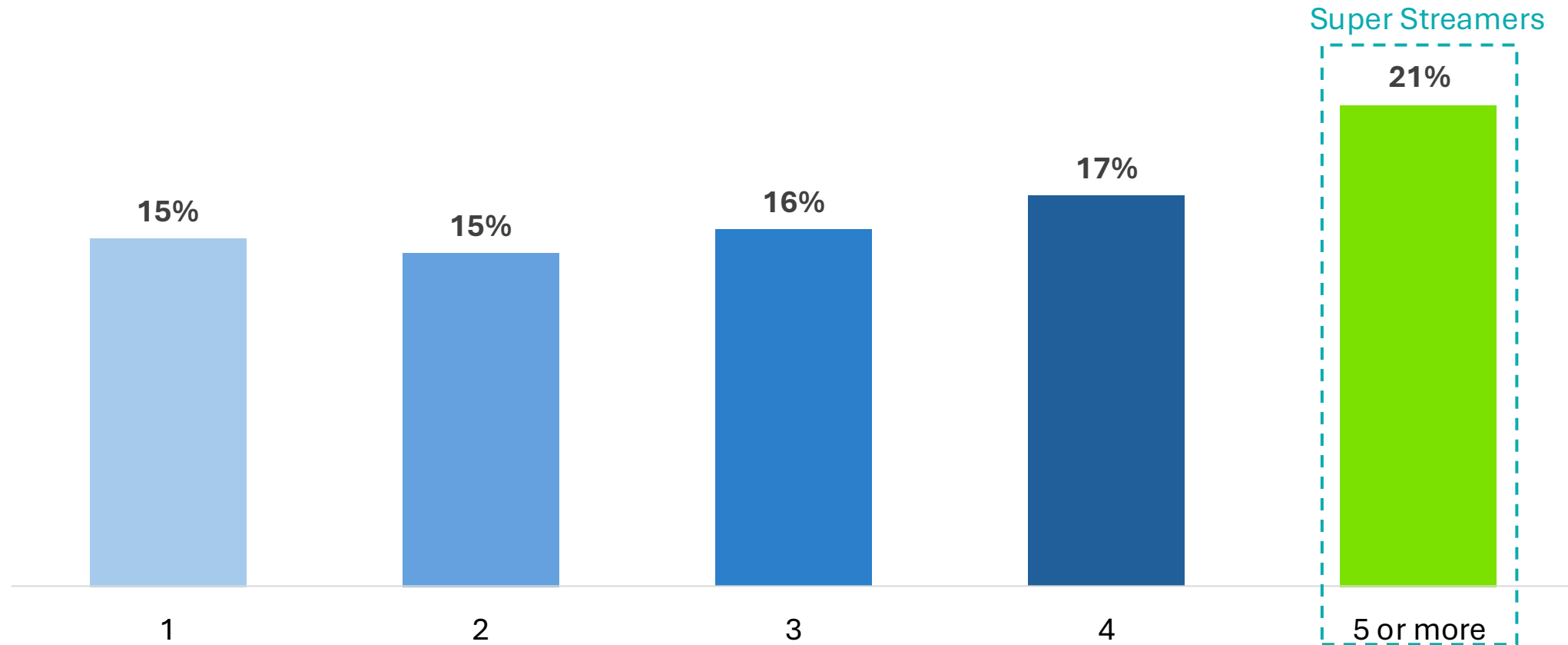
Number of subscribed SVODs by service, Q1 2026





# Super streamers have room for more: Using Netflix as an example, the acquisition opportunity is highest among streaming customers who stack 5+ services

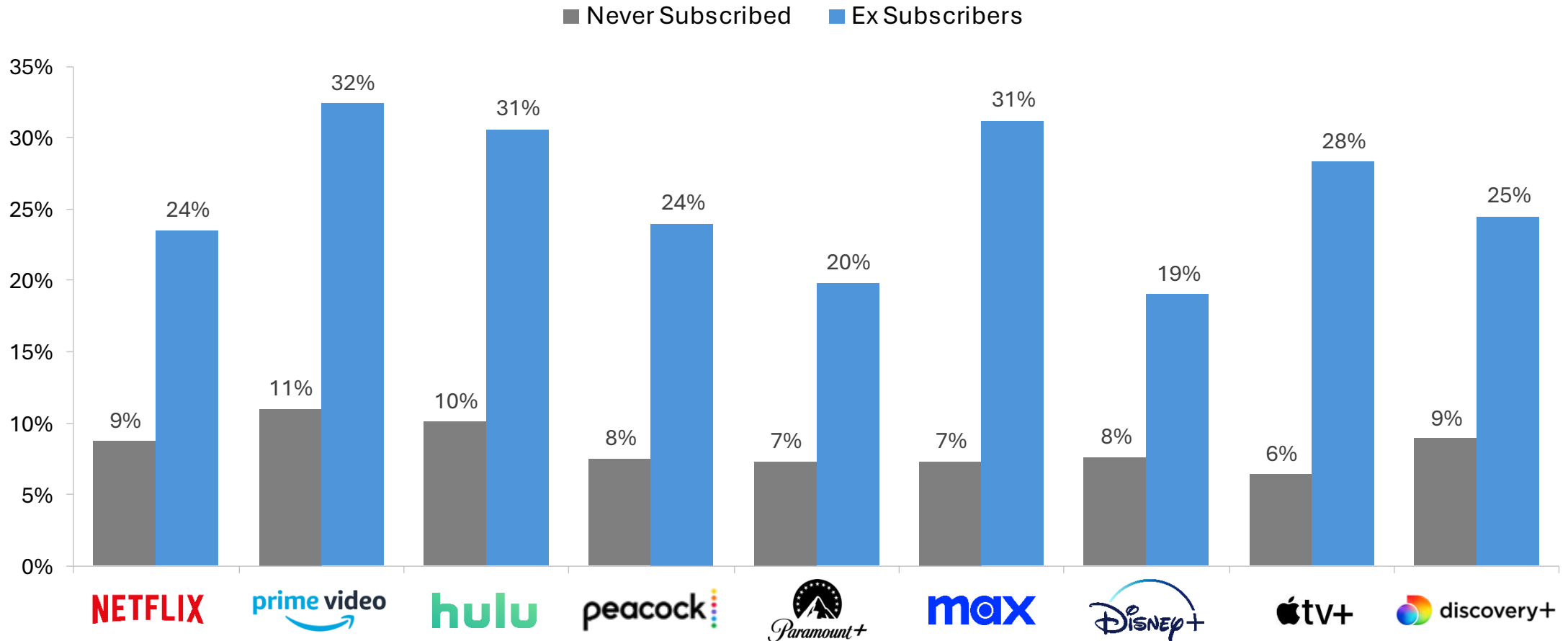
Likelihood to sign up for Netflix by number of SVOD subscriptions, Q1 2026





# It's worth staying in touch with former subscribers: They are much more likely to (re)subscribe than those who have never tried the service

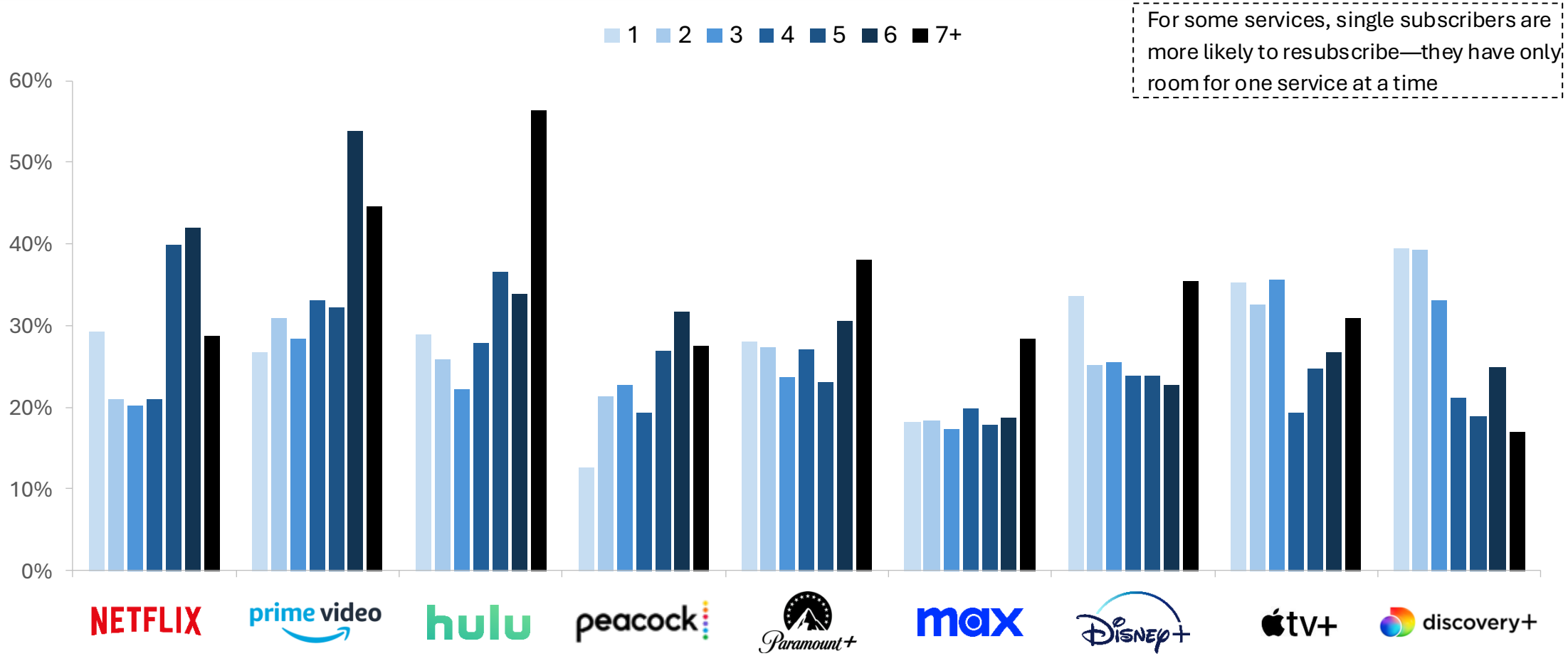
Subscription Likelihood by streaming service, Q1 2026





# Room for one more (service): Among former subscribers, re-subscription likelihood is higher for the super streamers

Resubscription Likelihood by number of currently subscribed SVODs, Q1 2026



## Super streamers are primed for (re)acquisition: HarrisX recommends...

Your easiest target would be the super-subscribers with 5 or more services—but they already have multiple services.



### Enter the skinny bundle

By creating a 'lite' version of your streaming service with a customized catalog, these subscribers with many content options may rejoin through **lower prices** and adding **only the content they want**.



### Stay in touch with former subscribers

Subscription cycling is not going away—engage former subscribers who are an easy re-acquisition target.



### Loyalty programs

The streaming landscape is crowded, but many subscribers want to return. Reward subscribers for maintaining their subscriptions with additional features or discounts.



# Breaking through the plateau: How to re-ignite growth

2

## The New Content Battleground: Live (News) & Sports

Demand for live programming and sports continues to rise, making it one of the most powerful drivers of subscriber acquisition and engagement in an increasingly crowded streaming ecosystem.



News wasn't considered entertainment until the launch of CNN in 1980, which invented the 24-hour news cycle

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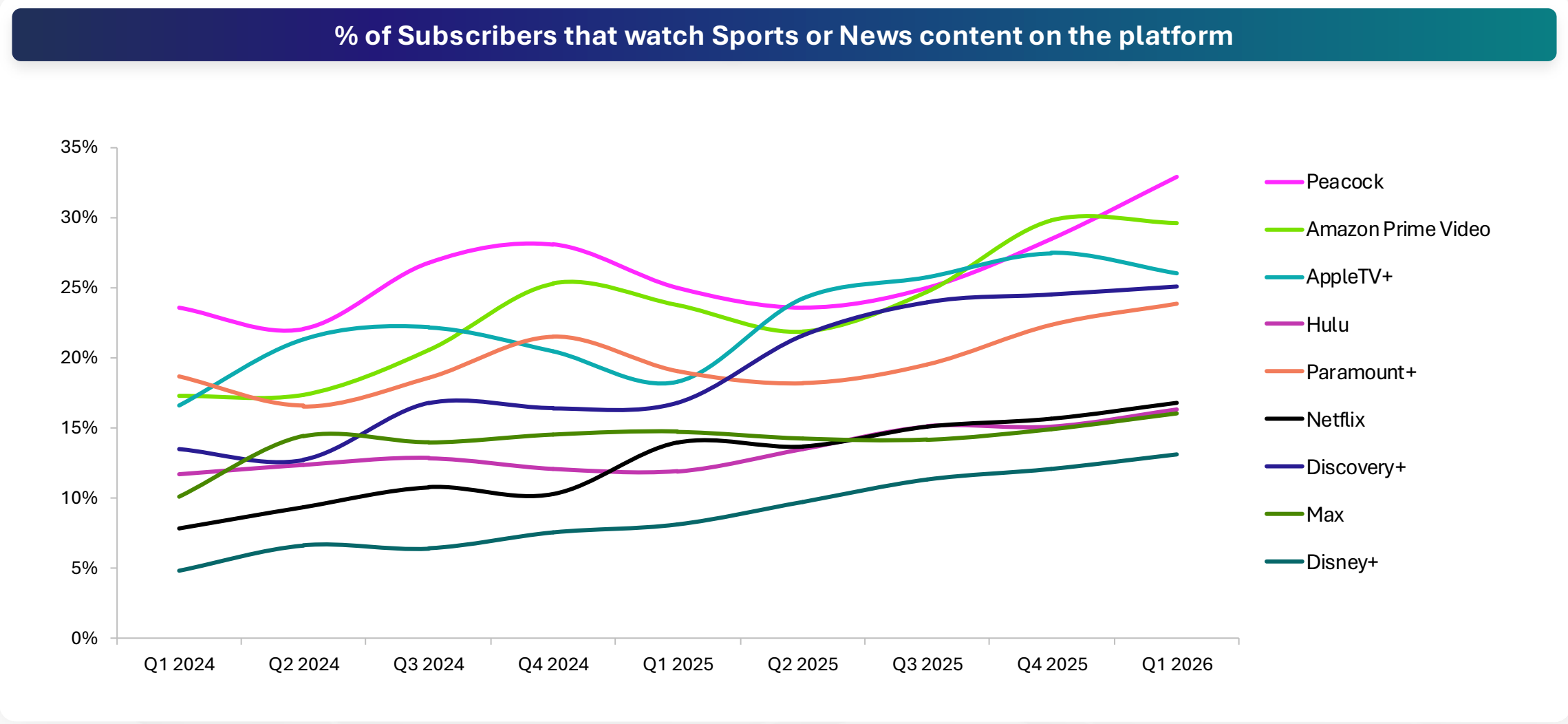
*Barring satellite problems in the future, we won't be signing off until the world ends.”*

**– Ted Turner**

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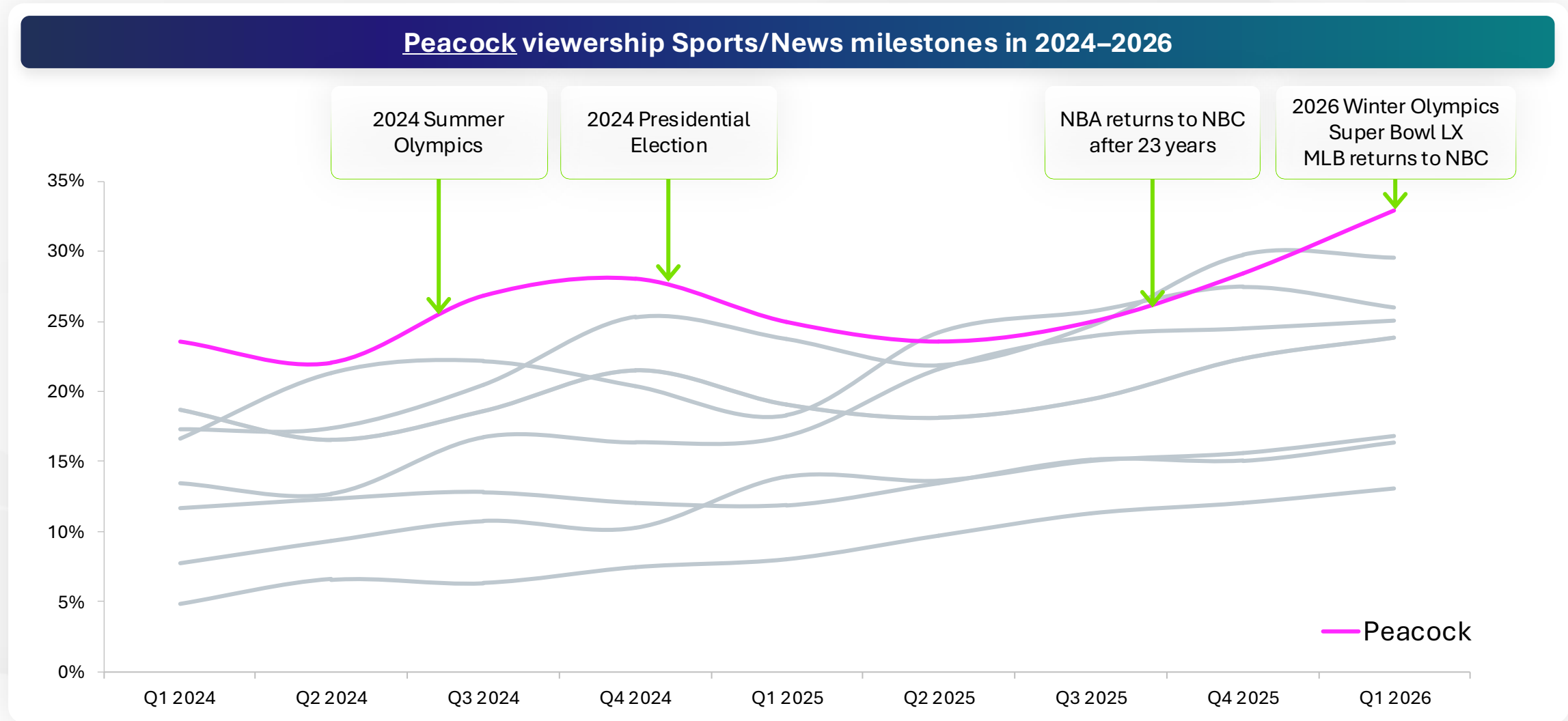
# Streaming isn't just movies and TV shows: Over the last two years, virtually every major SVOD has begun offering news and sports content, much of which is increasingly live



Are you surprised by Discovery+'s growth in Sports/News viewers on this list? Contact [streaming@harrisx.com](mailto:streaming@harrisx.com) for the story.

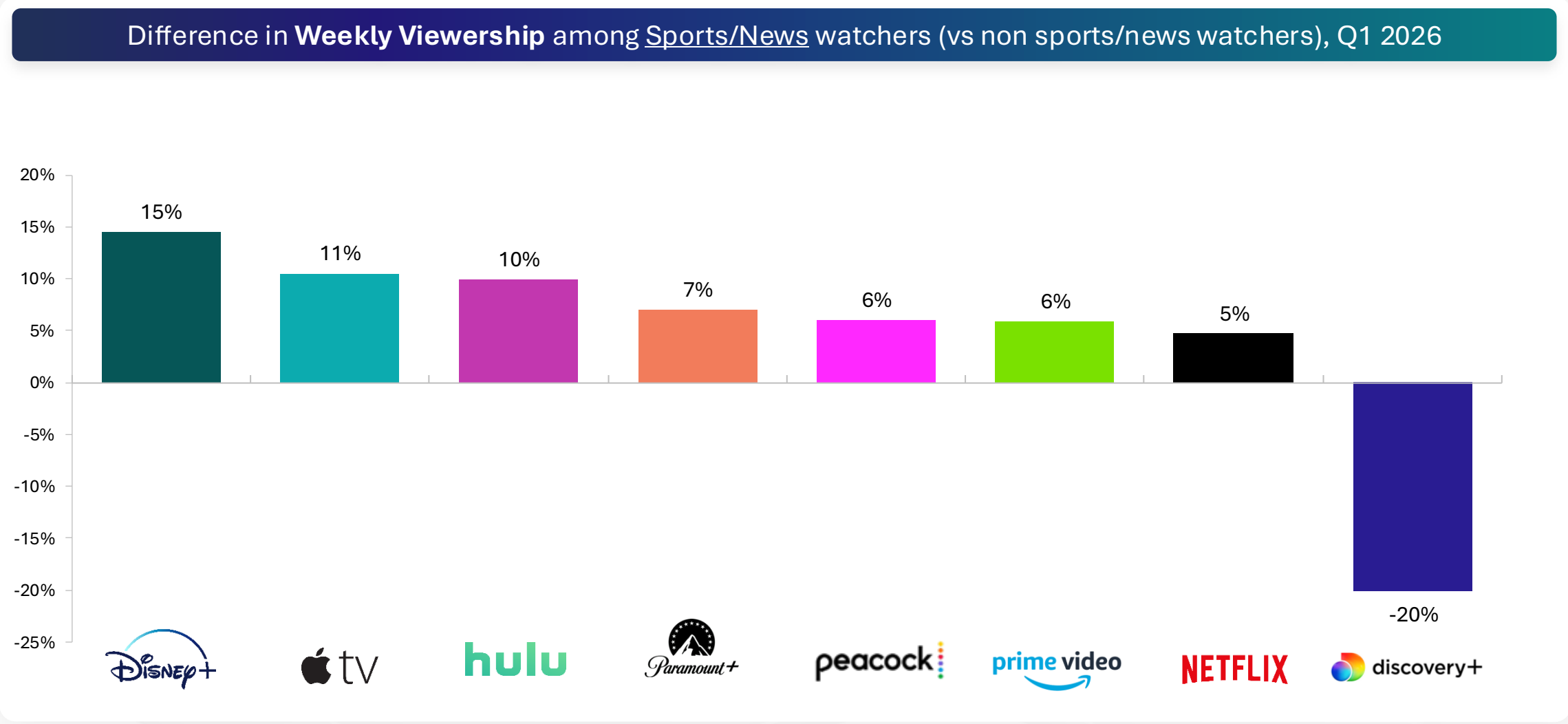


# TV is still the home of sports and news: NBC securing the rights to major sports franchises and events boosted Peacock's sports viewership in 2024–2026





# News & Sports watchers are more engaged: Weekly viewership is higher among those who watch compared to those who do not watch





# Offering Live content like News and Sports can bring more customers in: HarrisX recommends...



## Choose good infrastructure and bundle partners

From HarrisX's studies of the Super Bowl viewing experience, live events need the most robust connectivity infrastructure possible. Evaluate carefully what your ISP and mobile partners offer to their customers in terms of network technology, device, and how those contribute to customer experience.



## Sports and news can still build growth without being live

Live sports and news broadcast rights are expensive and difficult to obtain. HarrisX observes good results for replays (for sports) and newsmagazine style shows (for news) to fill in the gap with regularly updated content.



# Breaking through the plateau: How to re-ignite growth

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## Emerging Formats That Could Unlock Growth

Vertical video storytelling is here to stay—and is a part of the streaming landscape. At the intersection of vertical video and super streaming is subscriber growth.

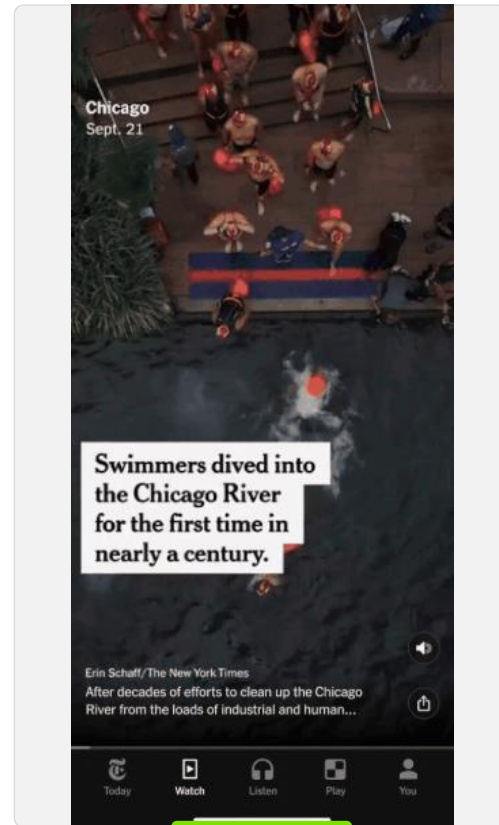


# As smartphone viewing has gained dominance through unlimited data plans and convenience, vertical video is being embraced across the media landscape



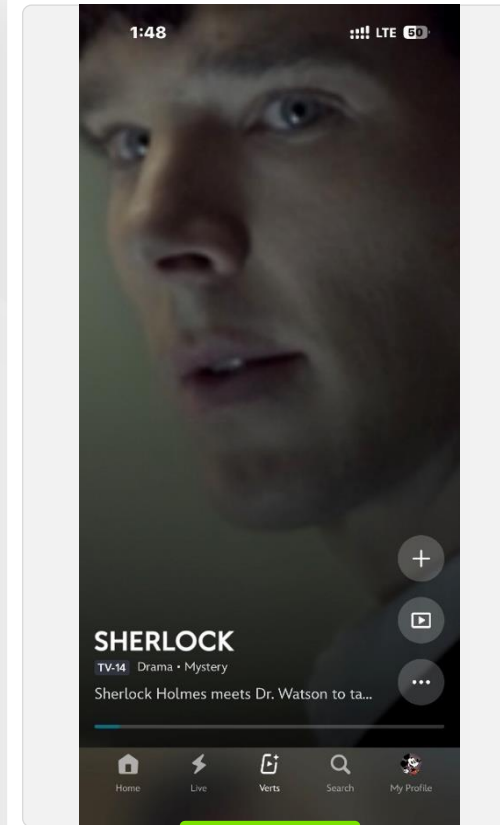
Vertical videos are video content **designed** to be viewed in **portrait mode** on a smartphone.

Examples include: TikTok, YouTube Shorts, Instagram Reels, Microdramas (such as ReelBox, DramaBox)

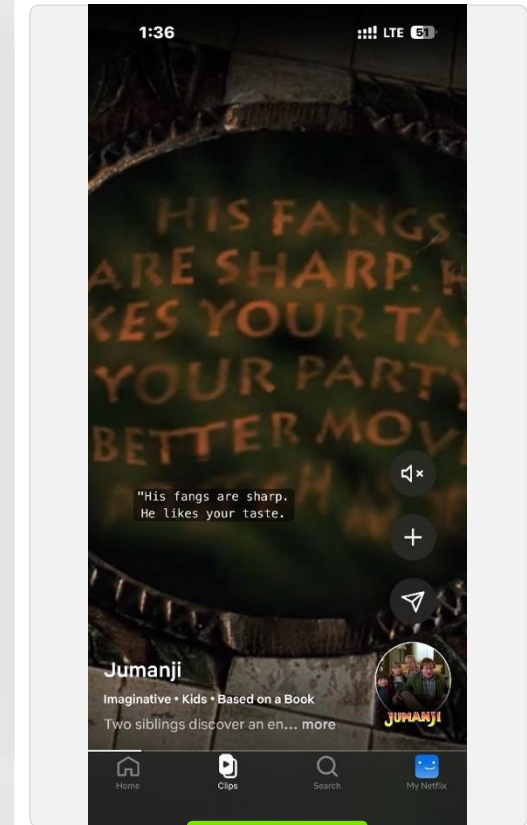


**The New York Times**

NYT.com Watch Tab  
October 22, 2025



Disney+ Verts  
March 12, 2026

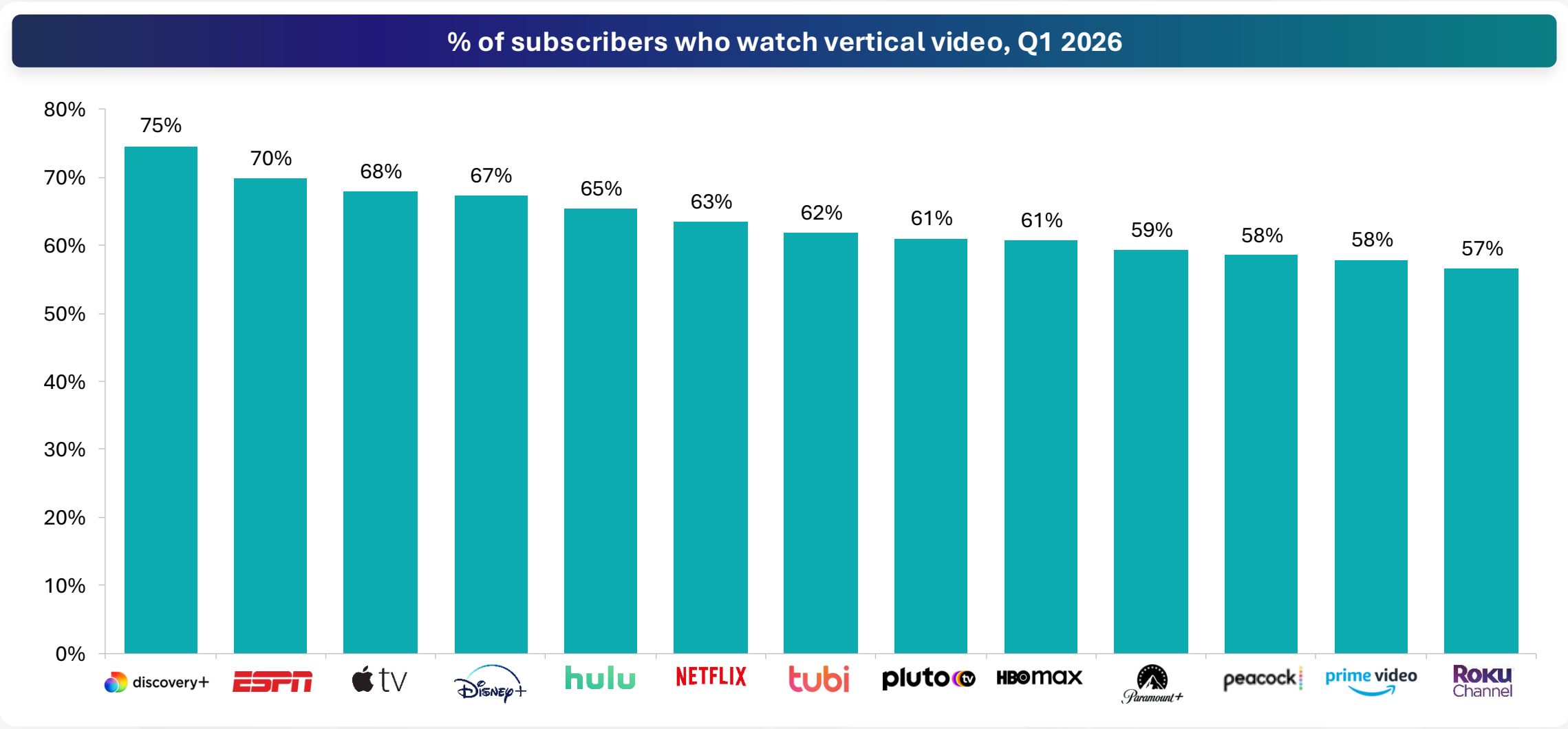


**NETFLIX**

Netflix Clips  
April 30, 2026



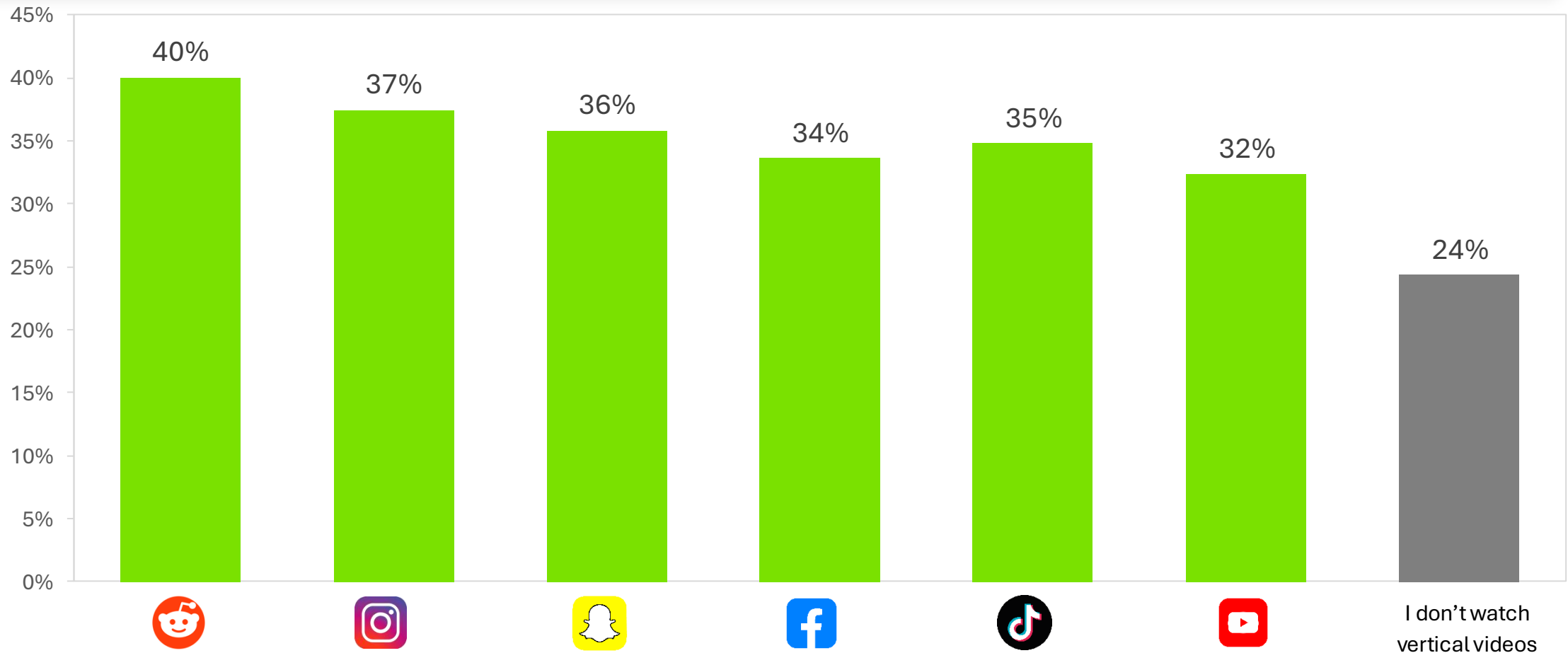
# Vertical video—YouTube shorts, TikToks, Instagram Reels—is here to stay, with more than 50% of subscribers at most services watching





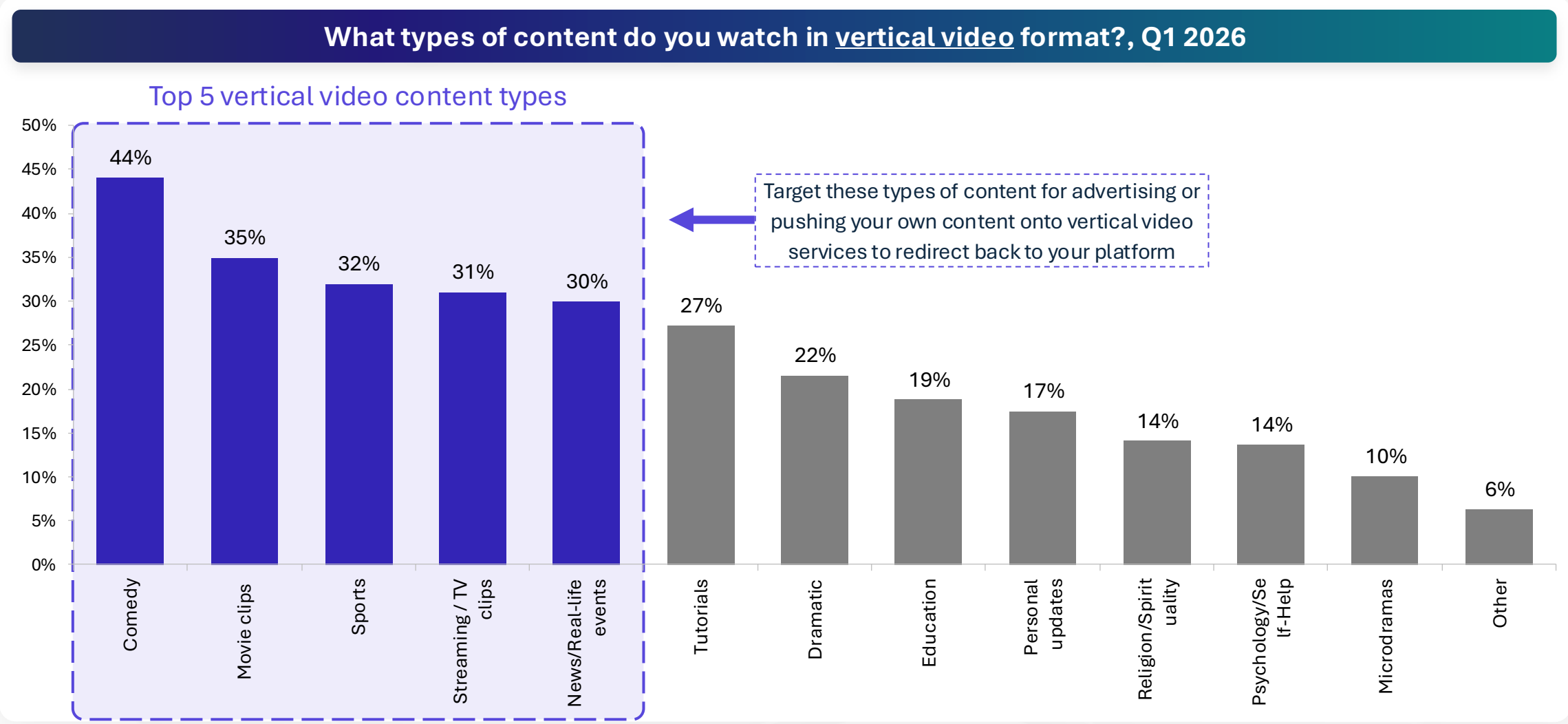
# Vertical video watchers have not abandoned streaming: Around a third are super streamers, compared to just a quarter of those who do not watch vertical video

% of vertical video watchers who have 5+ SVOD subscriptions, Q1 2026





# Vertical video may compete for time, but it can be a **streaming content discovery tool**: The **top 5** most popular types of vertical video content are also on streaming platforms





## Vertical video can help grow streaming: HarrisX recommends...



### Keep your friends close and enemies closer

Vertical video has very high take-rates among streamers because they love watching content. Use vertical video to remind these viewers it's better on the big(ger) screen with advertising or your own vertical video content.



### Different platforms attract different subscribers

Not all vertical video platforms are the same—their viewers have different content preferences and favored streaming services. HarrisX can help you target your audience more efficiently.



# Embrace the competition, because viewers with multiple subscriptions, live content, and short-form video are all paths to growth

What can we learn from super streamers, news and sports fans, and vertical video viewers?



## Streaming Overlap & Super Streamers

**Super streamers** are more likely to sign up (and re-subscribe).

### HarrisX recommends:

- Lower prices with customized content.
- Keep up with ex-subscribers: They're likely to rejoin.
- Loyalty programs for those who stay subscribed.



## Live (News) & Sports

**News and sports viewers** have higher rates of weekly watching.

### HarrisX recommends:

- Live content lives and dies by the user experience: Choose your ISP and mobile partners carefully
- Non-live sports and news can still pay off: replay clips and newsmagazine shows



## Vertical Video

**Vertical video** users subscribe to more services and love the same content on streaming.

### HarrisX recommends:

- Advertise on vertical video platforms or push your own content to stay top of mind
- Different vertical video platforms attract different types of streamers: Target efficiently

## Next week (May 14): MONETIZATION

High Value Households, Content Hoarders, and Ad Tier Opportunities

[streaming@harrisx.com](mailto:streaming@harrisx.com)



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



**Contact us:**

**[streaming@harrisx.com](mailto:streaming@harrisx.com)**



**We are located in  
New York and DC.**



# Thank you

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