

Marketer's Guide

▶ Innovative thinking to make a lasting impact on your business growth.

Free For All

Understanding The Growth of FAST Through Three Key Questions





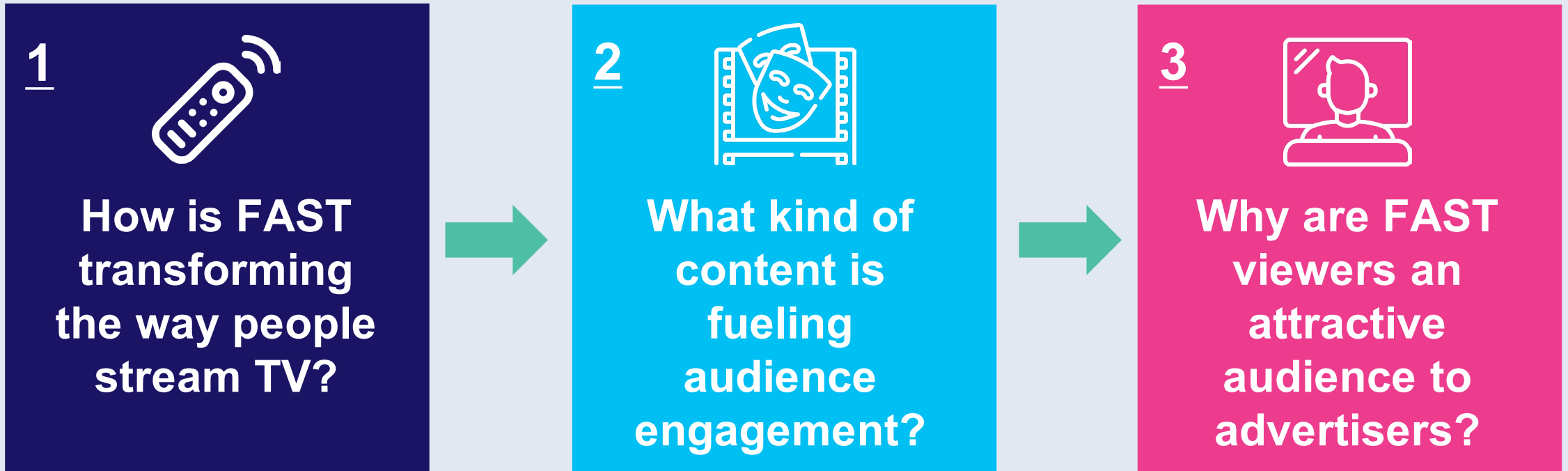
FAST is transforming the streaming landscape and capturing audiences at scale

Free ad-supported streaming TV (FAST) has rapidly grown from its early nascency into **one of the most dynamic platforms in streaming**, attracting viewers with no fees and minimal barriers to entry. Today, **over one third of the U.S. population is tuning in** and engagement continues to climb each year as audiences spend more time with these services.

When we **first examined the category in 2022**, FAST was only beginning to capture attention. Since then, it has matured into a **mainstream viewing destination**. Audiences are drawn to a wide mix of programming - from **popular entertainment to live content like sports and news** - that keep them coming back habitually.

This updated report answers three key questions, revealing **today's FAST landscape**, the **content fueling engagement** and the **viewers that are leading advertisers to increase their investment** each year in these services and channels.

In this report, we will answer **three key questions** around FAST's rise, the content that resonates and why the audience matters to brands



FAST is rapidly scaling as a free, ad-supported streaming option, driving strong growth in audience, usage and time spent



FAST delivers free, ad-supported TV that combines live channels with on-demand flexibility in a fully digital experience

Free ad-supported streaming TV (FAST) services are among the most accessible viewing options, available across connected TVs, mobile devices and desktops. Typically, **no log-in is required**, though some platforms may ask viewers to download an app or sign in.

FAST combines the **lean-back experience of live, scheduled channels** with the **flexibility of on-demand libraries**, allowing viewers to watch linear-style programming or select content on their own terms.

Its defining value is **bringing together both live and on-demand viewing in a single ad-supported environment** that feels as familiar as traditional TV yet is fully digital and broadband-delivered.



Note: Above screenshots reflect a sampling of FAST service interfaces.

With many on-demand and paid services available, FAST offers a free, frictionless viewing experience that complements other video platforms

	<u>SVOD w/o Ads</u>	<u>SVOD w/ Ads</u>	FAST	<u>vMVPD</u>	<u>Traditional TV</u>	<u>MVPD VOD</u>
<u>Viewing Experience</u> On-Demand vs. Live Scheduled Programming	Stream content on-demand on viewer's schedule	Stream content on-demand on viewer's schedule	Option to stream either live linear channels or on-demand content	Option to stream either live feeds of linear channels or on-demand content	Watch live or time-shifted content through an MVPD or antenna	Watch content on-demand on viewer's schedule through an MVPD
<u>Ad Experience</u> Ad-Free vs. Ad-supported	Ad-free	Ad-supported ('limited ad' options also available)	Ad-supported	Ad-supported	Ad-supported	Ad-supported
<u>Business Model</u> Paid vs. Free	Paid monthly or annual subscription	Some services are free & ad-supported, while others are offered as part of a SVOD / AVOD hybrid service at a lower cost with limited ads	Free to watch in exchange for viewing ads (Log-ins are available but not necessary)	Paid monthly or annual subscription	Paid MVPD subscription or free channels through Over-the-Air (OTA) access	Paid MVPD subscription

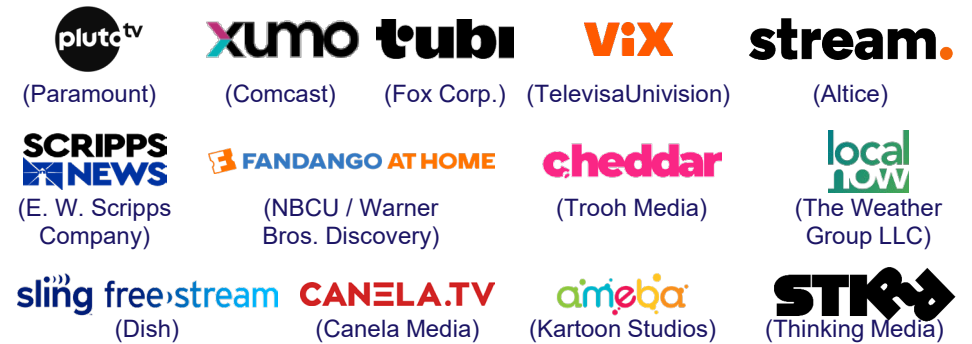
Note: SVOD refers to 'subscription video-on-demand'. MVPD (Multichannel Video Programming Distributor) reflects a cable, telco, or satellite provider. vMVPD refers to Virtual Multichannel Video Programming Distributors.

The FAST ecosystem is growing as major players scale up and independents carve out unique niches

Sampling of FAST Services Currently Available in the U.S.



Media Company-Owned FAST Services



Device / OEM-Owned FAST Services



Independent FAST Services



Download our 4-part series from 2022, [The FAST and the Curious](#), to see what the ecosystem looked like a few years ago.

Almost five hundred more channels have become available over the last two years, offering viewers greater choice and content variety

+57%

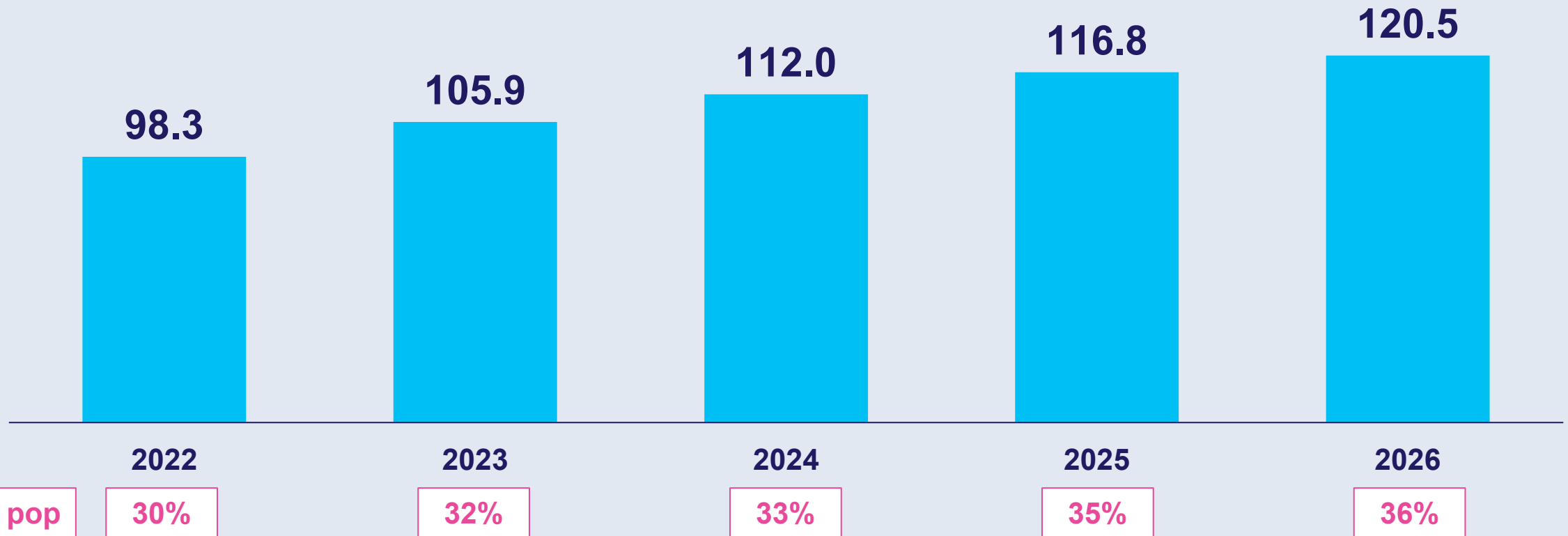
Increase in number of available FAST channels since mid-2023, with 1,318 channels available in the U.S
(vs. 837 channels in 2023)



Source: VAB analysis of Gracenote Data Hub, August 2025.

Over a third of the population – more than 100 million U.S. viewers - now watch FAST, with growth projected to continue through 2026

U.S. FAST Viewers
In Millions



Source: EMARKETER, *Over a Third of the Population Will Be Watching FAST This Year*, March 2025. Note: individuals of any age who watch videos or stream TV via app or website at least once per month on a free-to-access ad-supported platform that primarily offers professionally produced content; examples include Pluto TV, The Roku Channel, and Tubi; excludes all subscription OTT services, Twitch and YouTube. Download [Staying Current on Streaming: The Latest on Connected TV Consumer Behaviors](#) to get more insights on streaming trends & behaviors.

Viewers are spending considerably more time watching FAST channels, an increase of more than 50% over the last few years

- ▶ FAST accounts for **8% of daily time spent with digital video**, up from 6% three years ago



+54%

increase in **time spent with FAST**

between 2022 & 2025

(0:13 vs. 0:20 average time spent per day)



Source: EMARKETER Forecast, *U.S. Average Time Spent Per day with Free Ad-Supported Streaming TV (FAST)*, June 2025. Note: Ages 18+; includes all time spent watching video on FAST platforms via any device; FAST platforms are free-to-access ad-supported platforms that primarily offer professionally produced content; examples include Pluto TV, The Roku Channel, and Tubi; excludes all subscription OTT services, Twitch, and YouTube; includes time spent watching ad-supported video-on-demand (AVOD) on FAST platforms. Download [Staying Current on Streaming: The Latest on Connected TV Consumer Behaviors](#) to get more insights on streaming trends & behaviors.

The growth of FAST is outpacing other premium streaming platforms like vMVPDs and SVODs

Growth in U.S. App Usage on Devices Using Streaming Platform Apps March '23 vs. March '25

FAST

(Free Ad-Supported Streaming TV)

+109%

vMVPD

(Virtual Multichannel Video
Programming Distributor)

+50%

SVOD

(Subscription Video On Demand)

+34%

Source: LG Ad Solutions, *The Big Shift 2025*. LG Ad Solutions Device Data, 2025. Based on March 2025 survey of 1,133 U.S. CTV Viewers. All respondents were U.S. adults with an internet-connected TV (CTV).

Partnerships and live programming are reshaping FAST as audiences grow, with more sports and marquee events still to come



9/30/2025

Tubi to Stream Fox's Thanksgiving NFL Game



6/25/2025

Local Now adding 23 free channels from Warner Bros. Discovery



1/16/2025

NASCAR to launch first FAST Channel with exclusive partner Tubi

DEADLINE

8/18/2025

CNN Unveils New Programming For Headlines FAST Channel

DEADLINE

5/28/2025

Darren Criss And Renée Elise Goldsberry To Host Tony Awards Pre-Show On Pluto TV



12/18/2024

Roku Picks Up X Games Streaming Rights in Sports Push

The platform will stream X Games Aspen next year and a summer X Games event as it adds strategic sports rights to its free Roku Channel.

DIGIDAY

2/14/2025

Tubi's Super Bowl viewership highlights brands' embrace of FAST channels



9/18/2024

Comcast launches new FAST service The Network for original shows

The Network will only be available on Comcast's TV platforms, including Xumo Stream Box and Xumo TV.

FAST is a go-to for entertainment, sports, and news, driving strong engagement from younger audiences



FAST viewers are drawn to streaming by a mix of fresh originals and nostalgic favorites, with access to series and movies both new and old

‘What drives you to want to use a new streaming service?’

% of FAST viewers (top 5 ranked)



65%

Access to original series / movies exclusive to service



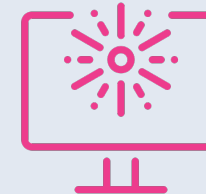
61%

Access to movies
(old and new)



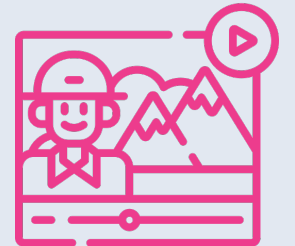
44%

Access to series that no longer air on traditional TV networks
(e.g., Friends, How I Met Your Mother, Friday Night Lights, etc.)



32%

Access to series that are currently airing on traditional TV networks
(e.g., The Walking Dead, The Good Place, This Is Us, etc.)



29%

Access to documentary / informational programming

Source: VAB analysis of MRI-Simmons 2025 August Cord Evolution Study, A18+. FAST viewers (44% of A18+ streaming population) include respondents who have watched the following services in the past 30 days: LG Channels, Local Now App, Plex, Pluto TV, Roku Channel, Samsung TV Plus, Tubi, Vizio WatchFree+, Xumo Play.

FAST offers services with a wide mix of content libraries and live programs, with sports and news emerging as key drivers of engagement

Sampling of the Types of Content That Can Be Watched on FAST Services

Bingeable Shows

Hit series, reality TV and crime favorites people love to rewatch



Breaking News

24/7 live updates from trusted national and local sources



Live Sports

Games, highlights and league channels that keep fans coming back



Movies On Demand

Free films across every genre refreshed with new titles all the time



Live Specials & Events

Award shows, concerts and real-time cultural moments



Niche Genre Channels

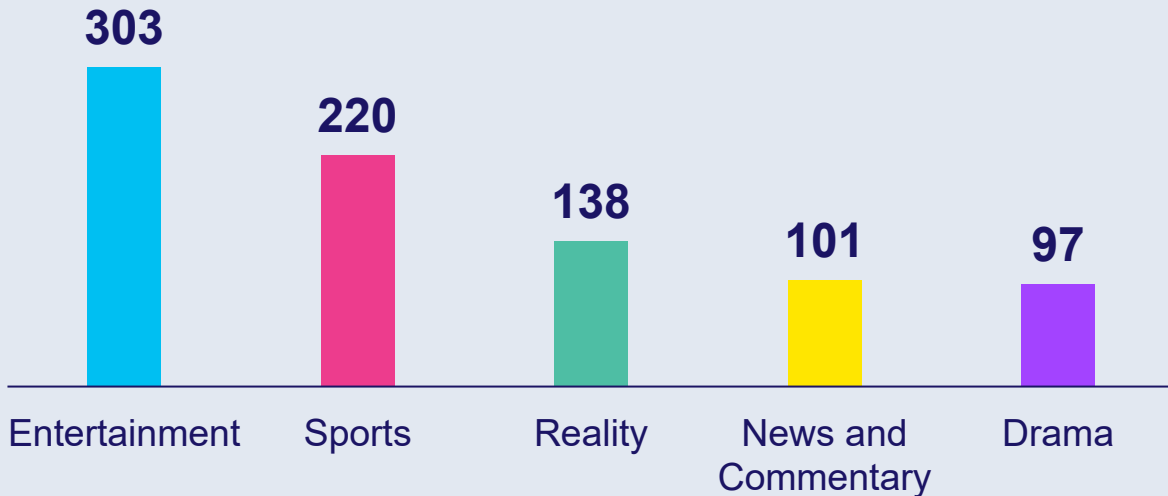
Curated content for passionate fan bases across unique interests



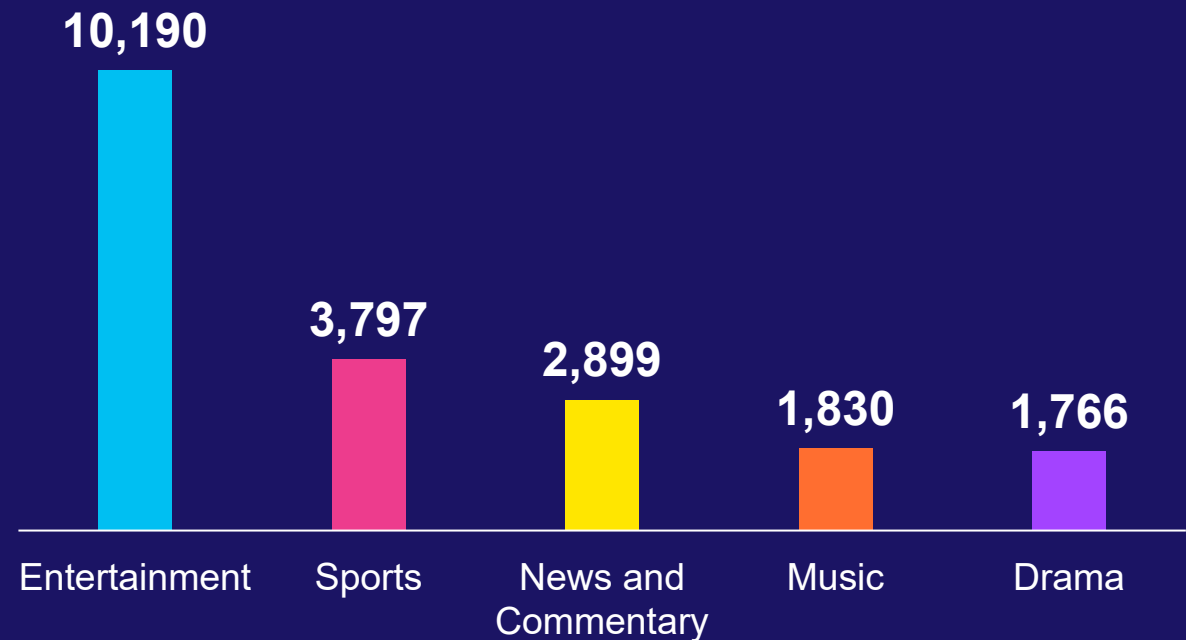
Entertainment tops FAST in channel and program counts, with news and sports also heavily represented

▶ News content made up 9.9% of FAST programming in 3Q 2025, a more than 2% increase from 7.8% in the prior quarter*

Top Five Genres in FAST by Channel Count



Top Five Genres in FAST by Program Count

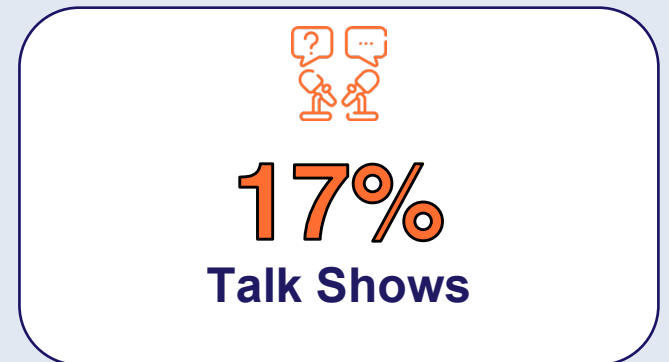
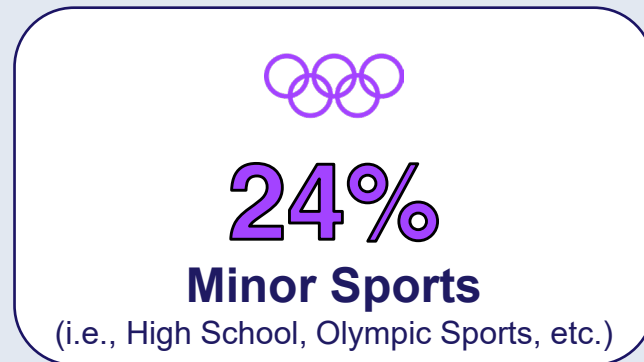
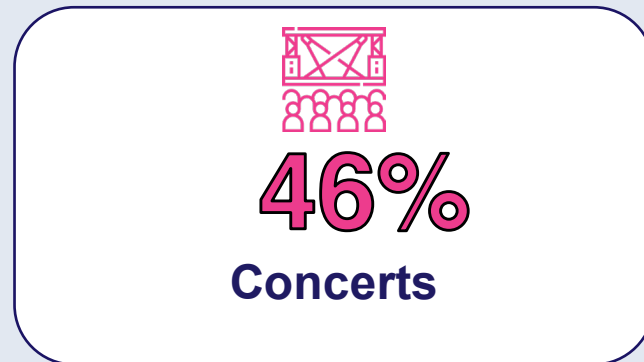


Source: Gracenote, *Beyond Nostalgia*, March 2025. Gracenote Global Video Data, February 2025. *Cablefax, *Free Channels Rising as Cordless News Destination*, 9/16/25.

FAST is becoming a destination for live content that viewers desire from streaming platforms, especially sports, music and news

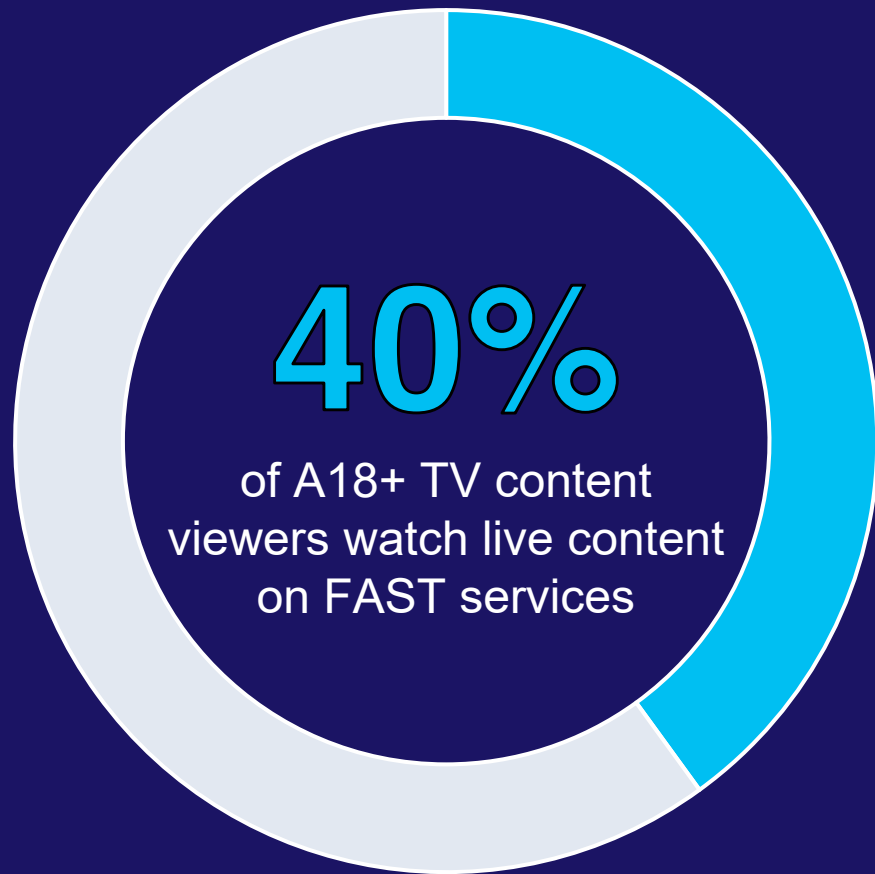
Types of live events that most influence viewing habits across free and paid streaming platforms

% of respondents



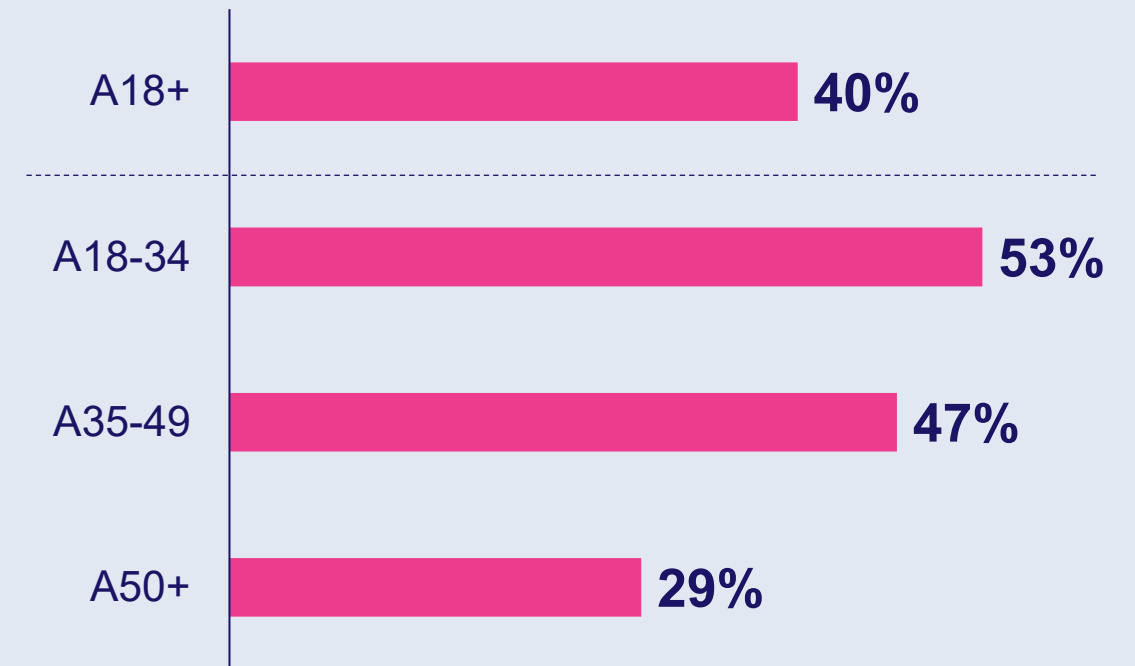
Source: Amagi, *Global FAST Report*, August 2025. N = 500+ U.S. households comprising diverse income groups.

Live content resonates most with younger audiences, who are turning to FAST for easy access to TV without the commitment to traditional pay-TV




Usage of FAST Services to Watch Live Content

Among TV Content Viewers Who Watch Live TV



Source: Horowitz Research, *State of Media, Entertainment & Tech*, 2025.



“**Live content is becoming a defining feature of FAST**, not just in sports but across genres that benefit from real-time engagement. What we’re seeing now is a shift in how audiences consume free streaming — they’re **not just browsing** channels but **tuning in for moments that matter**.

As the FAST ecosystem matures, platforms and content providers can **build more dynamic, event-driven programming strategies** that are aimed at driving **loyalty** and **monetization**.”

Srinivasan KA, Director & President, Global Business of Amagi

NRF Press Release, 4/2/2025

Viewers are spending more time with individual FAST channels, signaling stronger engagement, less channel surfing and greater ad opportunities

+25%

**growth in average channel session duration —
the amount of time viewers spend watching
a single channel before switching —
over the past year**

Source: Wurl, *The CTV Trends Report: Advertiser Edition*, 2025.

At the same time, viewers continue to explore more broadly, sampling an average of nine channels across a mix of genres, TV series and news



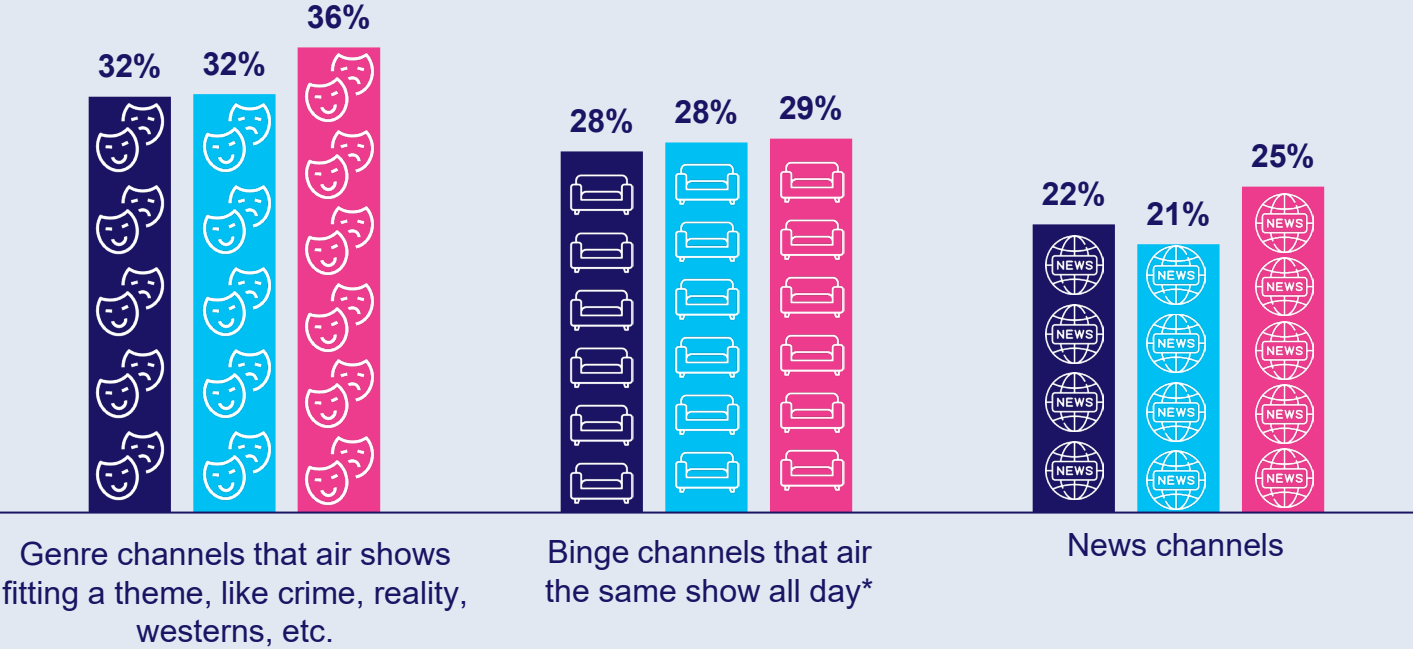
9

average number of FAST channels watched (vs. 5 in 2024)

Breakdown of FAST Consumption by Channel Type

% of respondents who use Free AVOD / FAST to watch live TV channels

■ Q2 '23 ■ Q2 '24 ■ Q2 '25

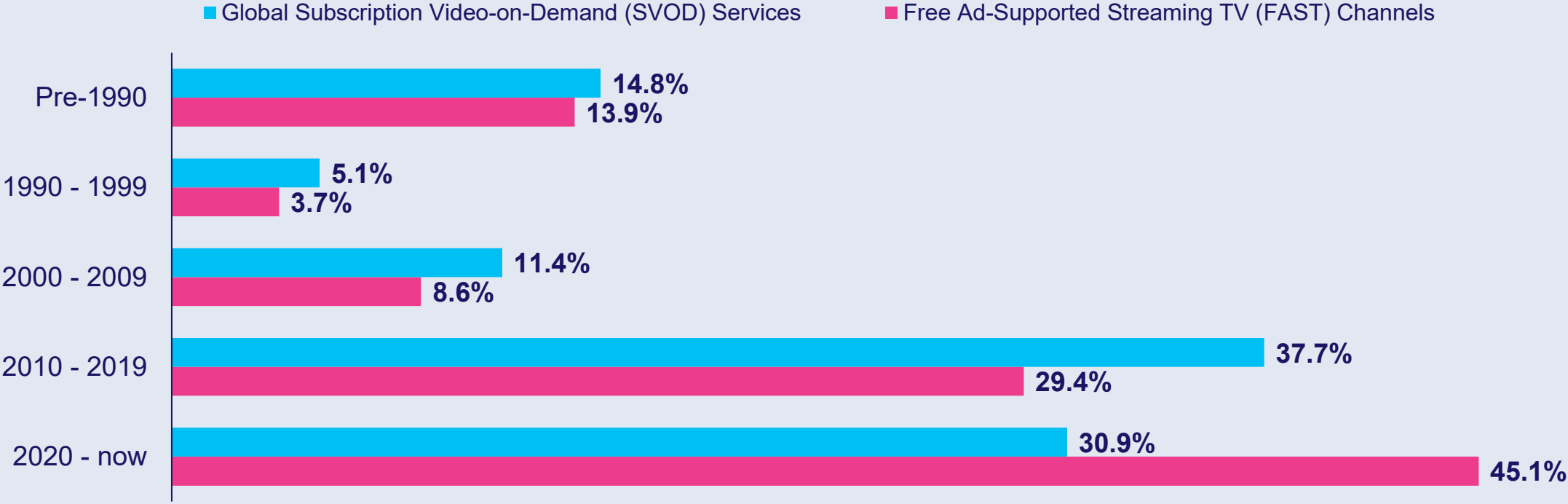


Source: TiVo, Video Trends Report Q2 2025. *e.g., Star Trek, Baywatch, Hell's Kitchen, etc.

FAST services offer a greater mix of fresh programming content and feature a larger share of more recent titles than SVOD platforms

Share of Available Video Content by Production Years

SVOD vs. FAST



Source: Gracenote as cited in a company blog, March 31, 2025. Note: includes TV shows and movies; SVOD includes Amazon Prime Video, Netflix, Disney+ / Hulu, Paramount+, and Apple TV+; numbers do not add up to 100% due to rounding read as 13.9% of all content available on FAST services was produced before 1990.

FAST attracts a highly engaged and increasingly younger, more affluent audience that is receptive to positive ad experiences



FAST viewers are engaging audiences who spend significant time with TV content, with a strong preference for live programming like sports

% of FAST viewers who agree with the following statements



85%

say they love streaming TV shows



62%

say they like to stream live sports



61%

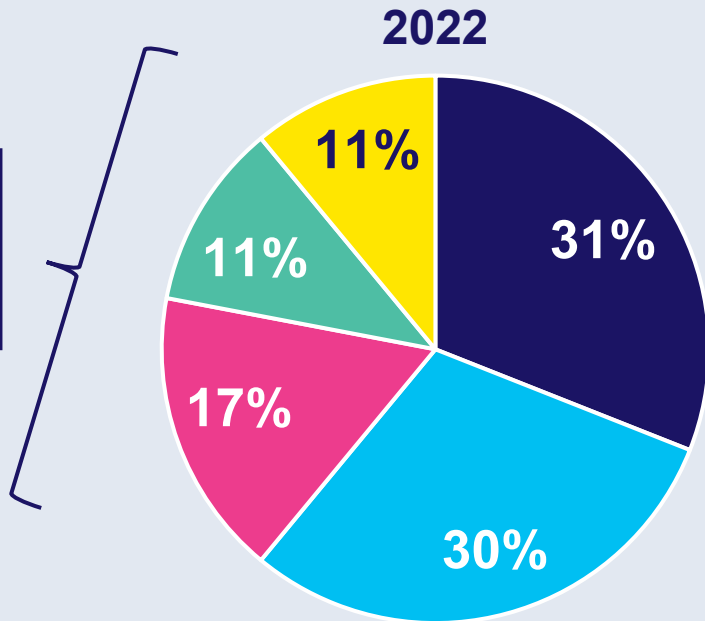
say they love to watch live TV

Source: VAB analysis of MRI-Simmons 2025 August Cord Evolution Study, A18+. FAST viewers (42% of A18+ streaming population) include respondents who have watched the following services in the past 30 days: LG Channels, Local Now App, Plex, Pluto TV, Roku Channel, Samsung TV Plus, Tubi, Vizio WatchFree+, Xumo Play. Reflects respondents who answered 'somewhat agree' or 'strongly agree.'

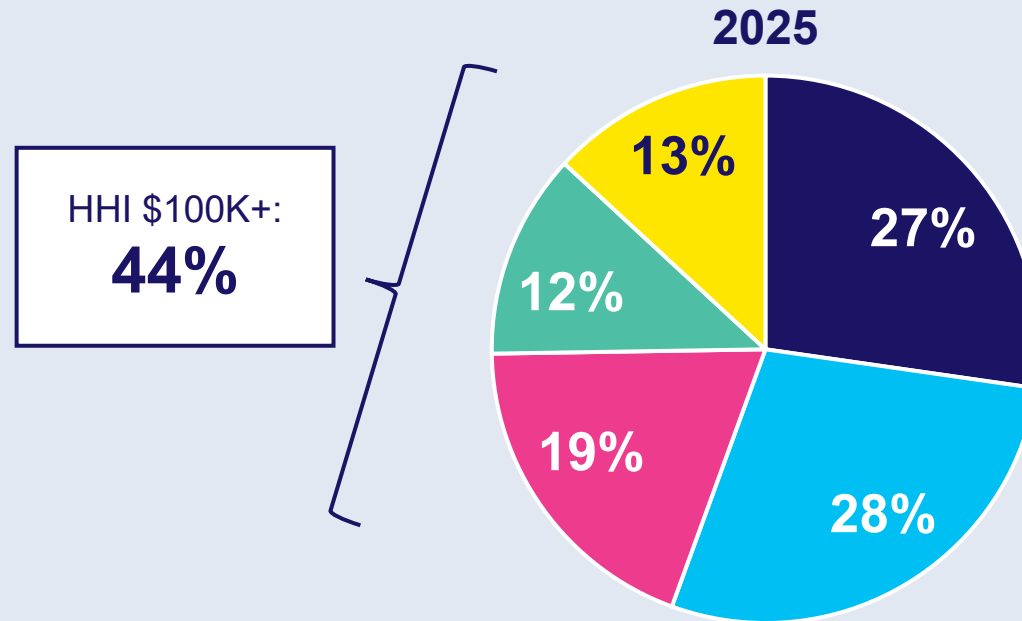
The median household income of FAST viewers has increased by 12% over the last three years

FAST Viewer Household Income

■ <\$50k ■ \$50-100k ■ \$100-150k ■ \$150-200k ■ \$200k+



FAST Viewer Median HHI: \$79K



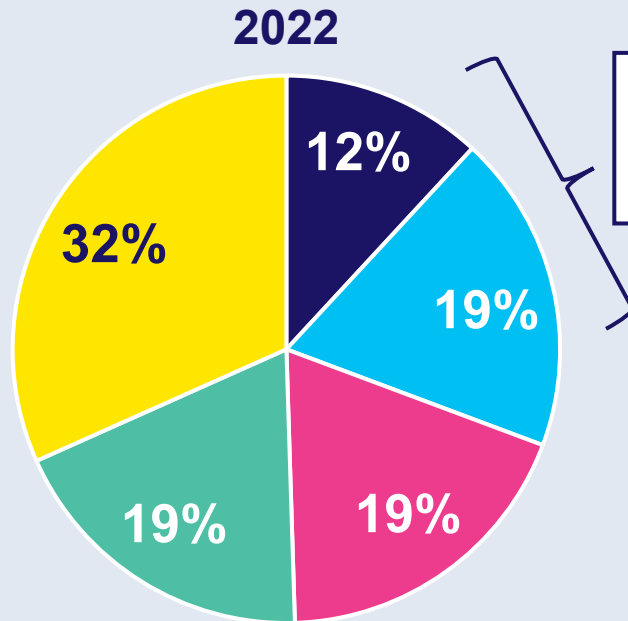
FAST Viewer Median HHI: \$89K

Source: VAB analysis of MRI-Simmons 2022 and 2025 August Cord Evolution Study, A18+. 2025 FAST viewers (42% of A18+ streaming population) include respondents who have watched the following services in the past 30 days: LG Channels, Local Now App, Plex, Pluto TV, Roku Channel, Samsung TV Plus, Tubi, Vizio WatchFree+, Xumo Play.

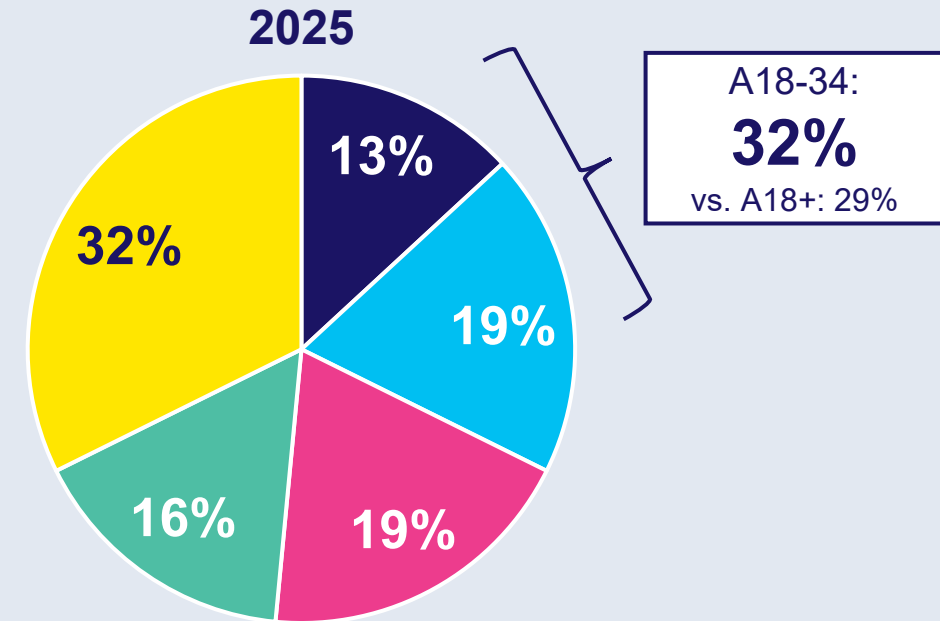
The FAST audience has also gotten slightly younger as household incomes have increased

FAST Viewer Age Summary

■ A18-24 ■ A25-34 ■ A35-44 ■ A45-54 ■ A55+



FAST Viewer Median Age: 45.4



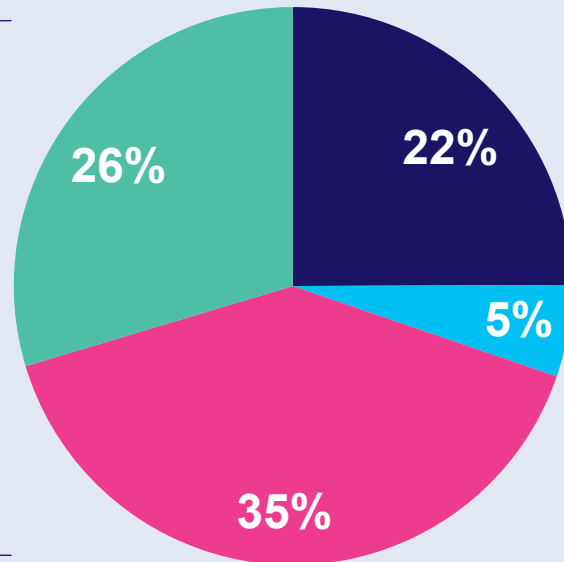
FAST Viewer Median Age: 44.2

Source: VAB analysis of MRI-Simmons 2022 and 2025 August Cord Evolution Study, A18+. 2025 FAST viewers (42% of A18+ streaming population) include respondents who have watched the following services in the past 30 days: LG Channels, Local Now App, Plex, Pluto TV, Roku Channel, Samsung TV Plus, Tubi, Vizio WatchFree+, Xumo Play.

Most FAST viewers are cord cutters or cord nevers who are seeking a cable-like experience without the commitment - but with the ads

FAST Viewer Cord Status

■ Cord Loyalist ■ Cord Shaver ■ Cord Cutter ■ Cord Never



61% of FAST viewers are 'cord cutters' or 'cord nevers'



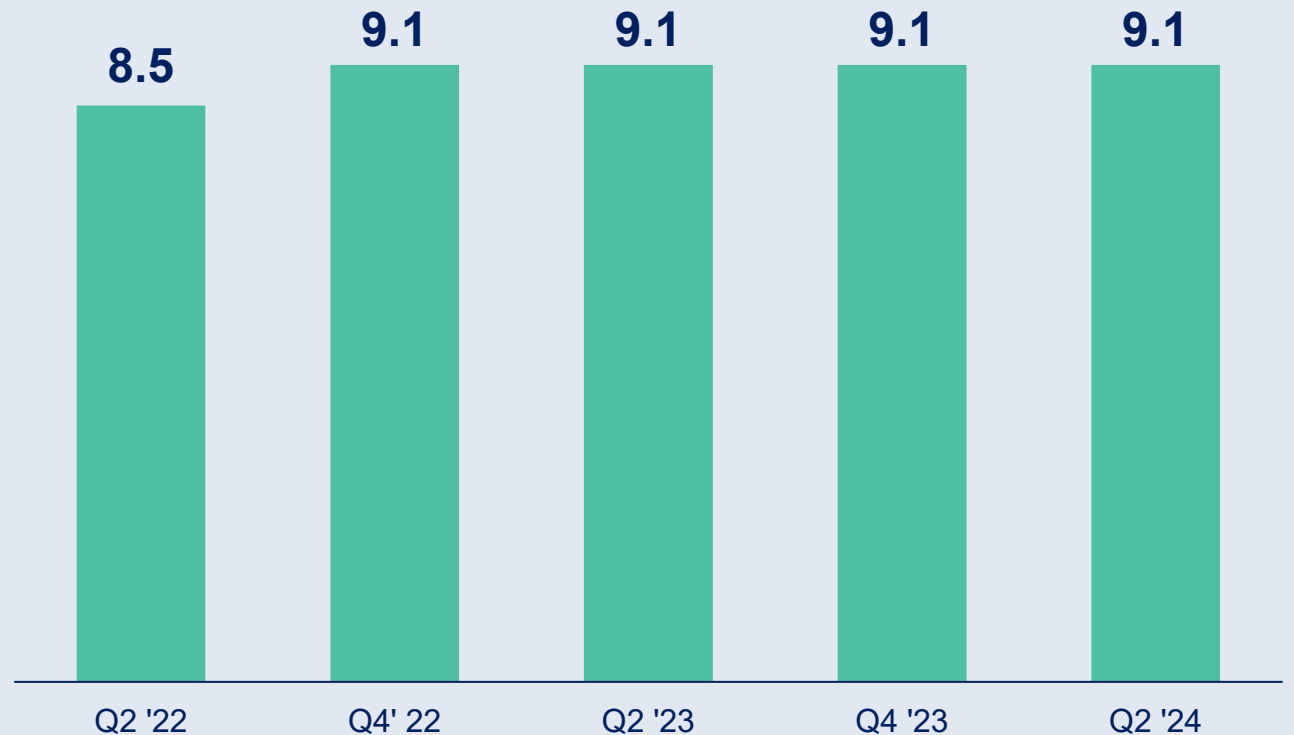
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FAST viewers rate ads more favorably, thanks to a steady nine-minute ad load that balances monetization with a positive viewing experience

54%

of FAST viewers feel that the platforms handle ads / promotions **better than other providers** (vs. 3% who answered 'worse')

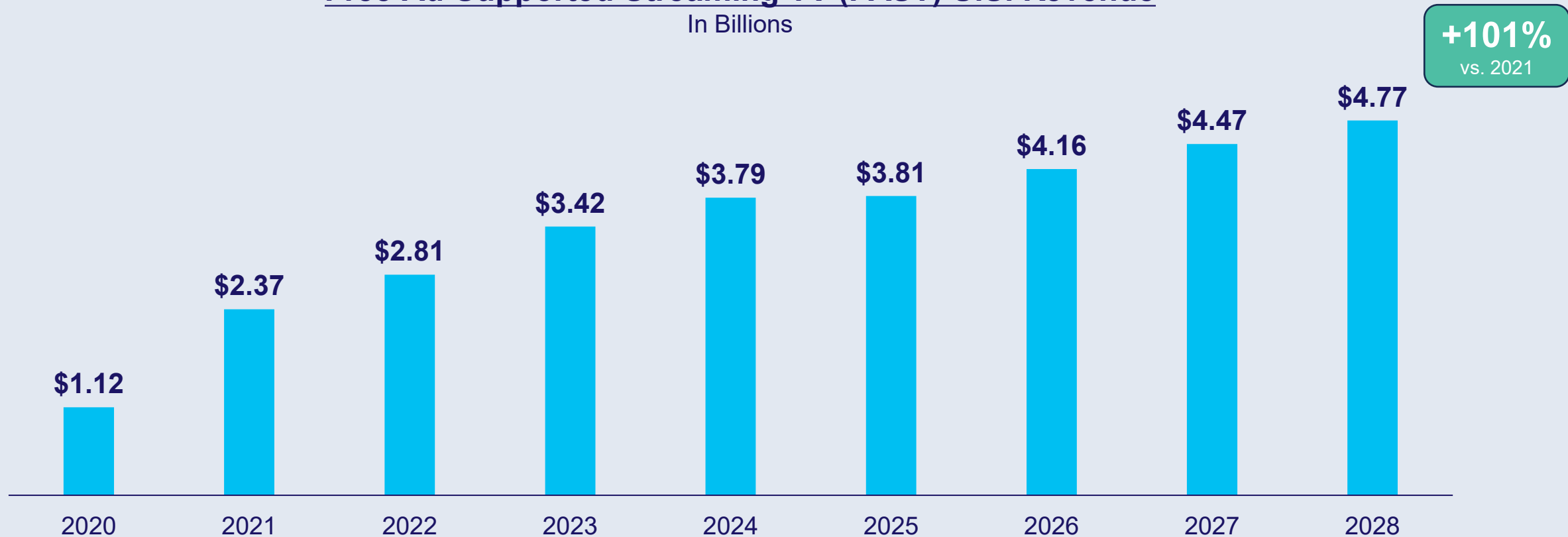
Average Commercial Minutes Per Hour on FAST*



Source: Hub Entertainment Research, *Fast and Curious: Why Viewers Are Embracing Free TV*, January 2025. Base: TV Source Watched and Assigned – Show Included Ads or Promotions. FAST Respondents – n = 732. Q: Think about the way ads or promotions were handled during this show – the number of ads, how long the ad breaks were, how relevant the ads or promotions were for you personally, etc. Overall, would you say that the way ads were handled was..... Reflects respondents who answered 'a lot better' or 'a little better'. Other 'providers': AVOD, vMVPD, and MVPD. *Wurl Analytics, *The CTV Trends Report 2024*. Note: Based on data across Wurl's partnerships with more than 4,000 FAST channels and streaming services.

FAST ad revenue has doubled since 2021 and is set to keep growing, signaling its rising adoption as an ad platform in the streaming ecosystem

Free Ad-Supported Streaming TV (FAST) U.S. Revenue
In Billions



Source: S&P Global Market Intelligence Kagan estimates; industry data; company data. Data compiled December 2024.



“FAST channels are **reshaping the streaming landscape**, and their rapid growth proves what we already know - consumers love free. The **real opportunity for advertisers is with premium FAST services** that deliver **trusted, brand-safe content at scale** and keep viewers highly engaged.”

Daniel Spinoso, President, Premion

FAST is reshaping streaming with free quality content, engaged viewers and strong advertiser appeal

1



How is FAST transforming the way people stream TV?

- ▶ Viewers are embracing **quality content** without the paywall, which now includes more **sports, live events** and other **marquee** programming
- ▶ The ecosystem is **rapidly expanding** with more channels and players

2



What kind of content is fueling audience engagement?

- ▶ FAST is emerging as a hub for **live and on-demand entertainment**, like sports and news
- ▶ Viewers are **watching longer** and **exploring more channels** that feature **fresh, new** content

3



Why are FAST viewers an attractive audience to advertisers?

- ▶ FAST viewers are **deeply engaged** younger audiences with growing household incomes
- ▶ FAST's appeal is fueling rapid **revenue growth** and making it a **key player** in the streaming ad market

Key Marketer Takeaways

- ▶ FAST has grown from nascency to mainstream, becoming a central part of the streaming ecosystem with free ad-supported access across live and on-demand programming at scale
- ▶ As FAST continues to expand, viewers are spending more time with services and individual channels, creating more ad opportunities across a wide mix of entertainment, sports and news programming
- ▶ FAST viewers represent a valuable and growing younger audience, defined by steady engagement, rising household income and an openness to ads
- ▶ For marketers, FAST delivers scale and momentum, with growing content and advertising investment and an outlook of sustained growth into the future

Revisit our original series to understand where the market stood in 2022 to understand the progress FAST has made over the last three years

Transform

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2022

Episode 1
The FAST and the Curious
What is Free Ad-Supported Streaming TV (FAST)?

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2022

Episode 2
The FAST and the Curious
Who is the FAST viewer and how do they compare to other streamers?

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2022

Episode 3
The FAST and the Curious
How do FASTs meet the 6 entertainment 'need states' for consumers?

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2022

Episode 4
The FAST and the Curious
How can marketers harness the rapid growth of FAST?

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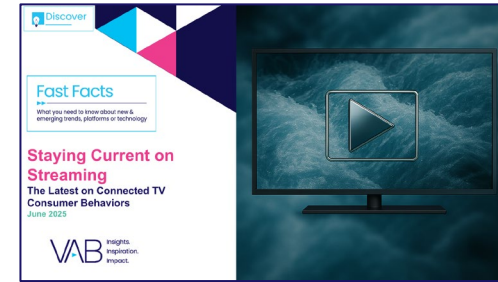
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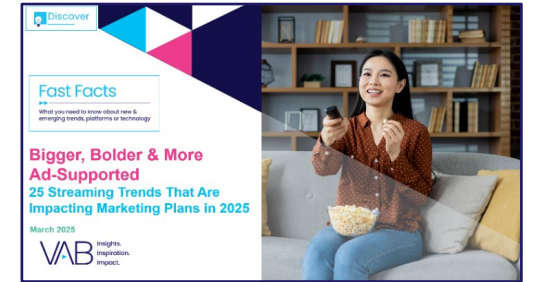
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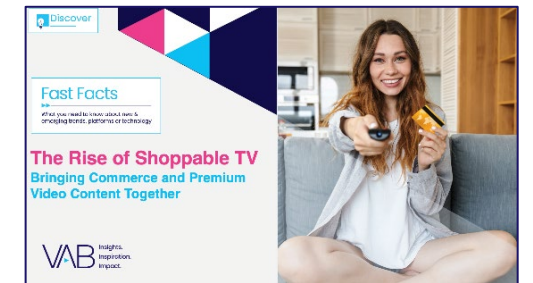
Staying Current on Streaming
The Latest on Connected TV Consumer Behaviors – June 2025



Bigger, Bolder & More Ad-Supported
25 Streaming Trends That Are Impacting Marketing Plans in 2025



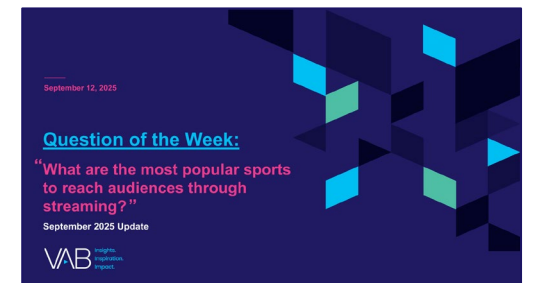
What Is CTV?
Defining and Understanding the Connected TV Advertising Ecosystem



The Rise of Shoppable TV
Bringing Commerce and Premium Video Together



The Power of Premium Video
What It Means for Multiscreen TV and Why It Matters to Marketers



What are the most popular sports to reach audiences through streaming?

About VAB

VAB plays a dual role in the video advertising industry. We are leading the change to bring about a more innovative and transparent marketplace. We also provide the insights and thought leadership that enables marketers to develop business-driving marketing strategies.

Drawing on our marketing expertise, we **simplify** the complexities in our industry and **discover** new insights that **transform** the way marketers look at their media strategy.



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