

Fast Facts

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What you need to know about new & emerging trends, platforms or technology

Rising Tides

26 Streaming Insights That Are Impacting Marketing Plans in 2026

March 2026





The ‘rising tides’ of ad-supported streaming are surging to new heights

As the ad-supported ecosystem continues to evolve, we are highlighting **26 insights shaping the streaming landscape** for 2026, which marks VAB’s **12th year** of analyzing this marketplace.

These insights provide the latest research on **streaming behaviors, device and platform usage**, the **growth of ad-supported** services and tiers, and the importance of **quality content**.

The high-water mark of ad-supported streaming has cemented its role as a **cornerstone of Premium Video and Multiscreen TV strategies** as it drives innovation across **CTV home screens, live sports** and **retail media**, creating new opportunities for brands to connect with engaged audiences.

Read on to explore how these 26 insights are reshaping ad-supported streaming and marketing plans in 2026.



26 Streaming Insights That Are Impacting Marketing Plans in 2026

Audience Currents

How viewers define, connect and engage with TV

Consumer Definition of TV

Pace of Cord-Cutting

Diverse Streaming Audiences

Smart TV Ownership

Convergent TV Ad Spend

Where Streaming Flows

The devices, platforms and viewing behaviors shaping CTV

TV Usage by Device

TV by Access Type

Communal Viewing

Co-Viewing by CTV Platform

CTV Session Length

Services Streamed Annually

Smart TV App Monthly Usage

CTV Sports Access

The Ad-Supported Wave

The rapid rise of ad-supported streaming across platforms

CTV Home Screen Ads

Growth of AVOD Viewers

Appetite for Ads on Streaming

Ad Preference on Streaming

Growing Adoption of Ad Tiers

Ad Time by TV Platform

Growth of FAST

CTV Retail Media

High Tide for Quality

Entertainment content and live sports & news are powering growth

Content Shift to Streaming

The Ubiquity of Multiscreen TV

Top Content Genres

Live Sports Streaming

Bundling Up

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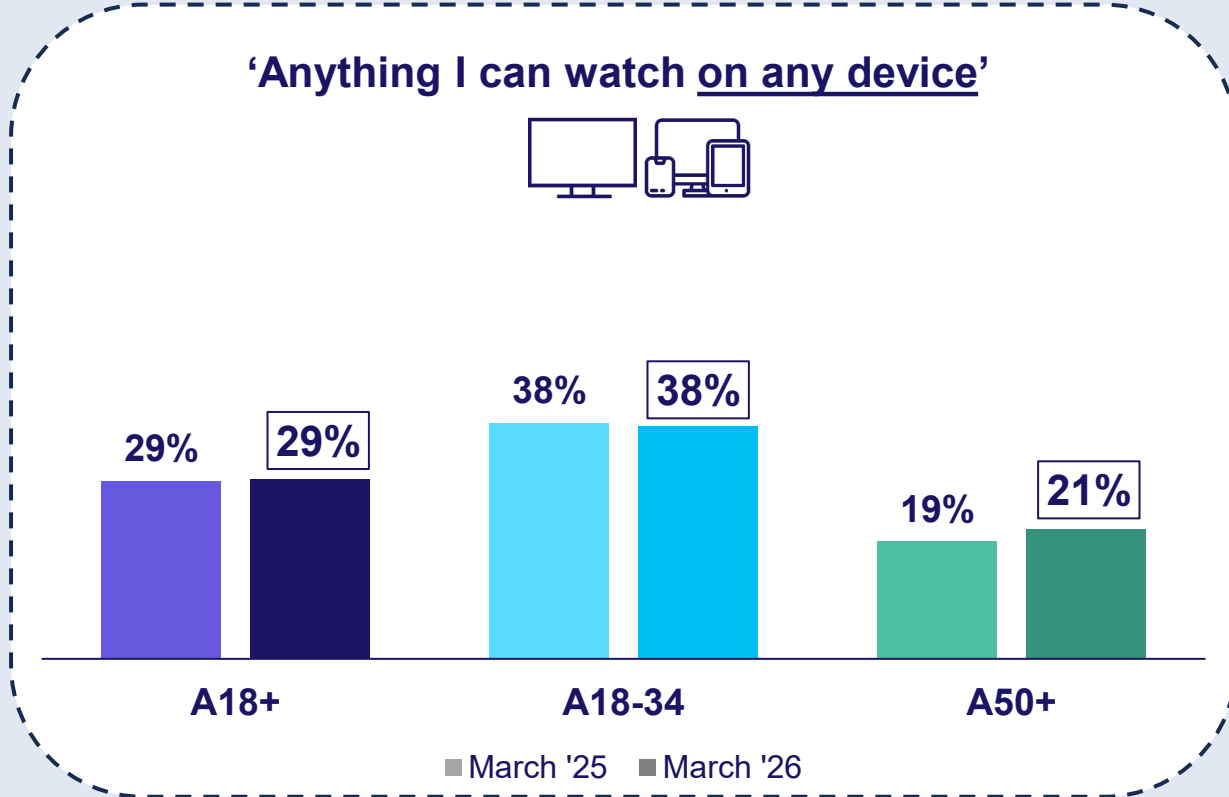
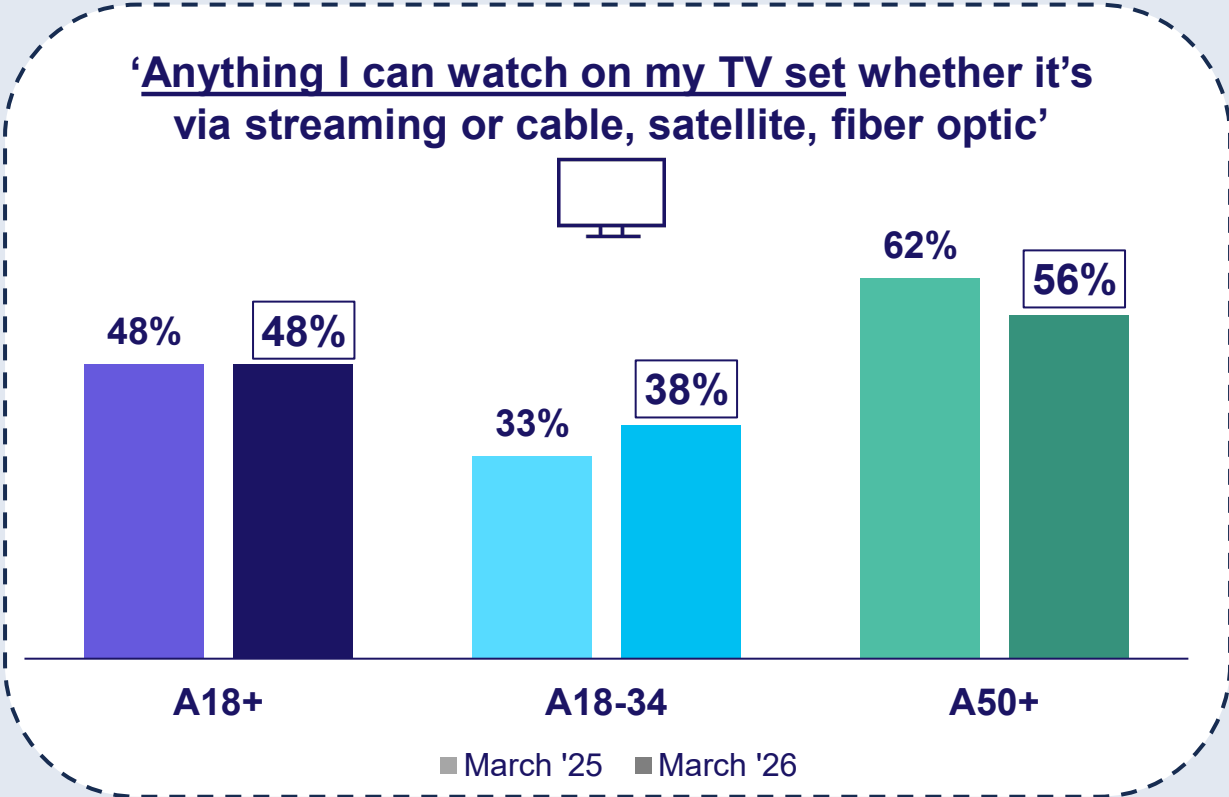
Audience Currents

How viewers define, connect
and engage with TV



While younger adults are more likely to have a broader definition of 'TV,' they are increasingly thinking of it in terms of TV as the device

How do you personally define TV? % of video streamers who agree



Source: VAB analysis of MRI-Simmons March 2025 & March 2026 Cord Evolution Studies, A18+. Base = 'Streamed in the past 12 months.'

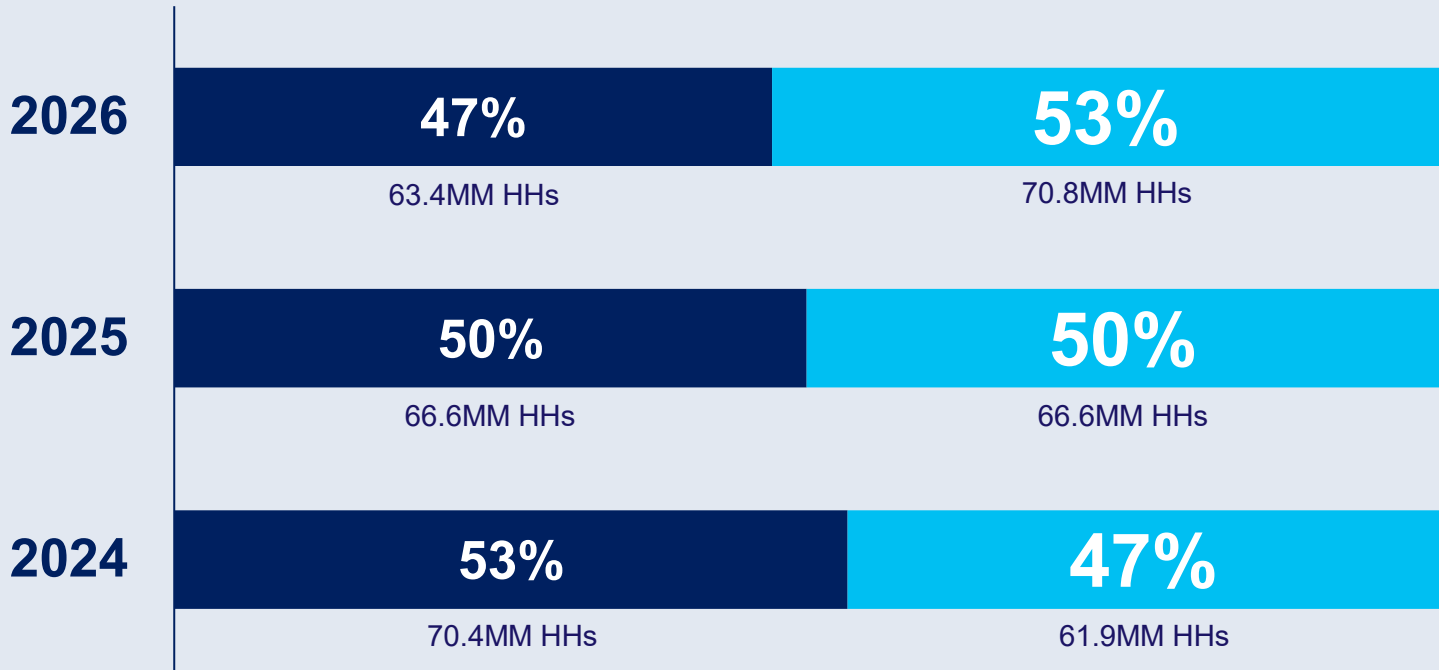
Non-pay TV HHs have overtaken total pay-TV HHs (including vMVPDs) during 2026 with nearly 71 million homes

▶ 59% of adults 18+ consider themselves 'cordless,' with 'cord cutters' accounting for 34% and 'cord nevers' making up 25%*

Share of U.S. Pay TV vs. Non-Pay TV Households

Pay-TV HH universe include vMVPDs

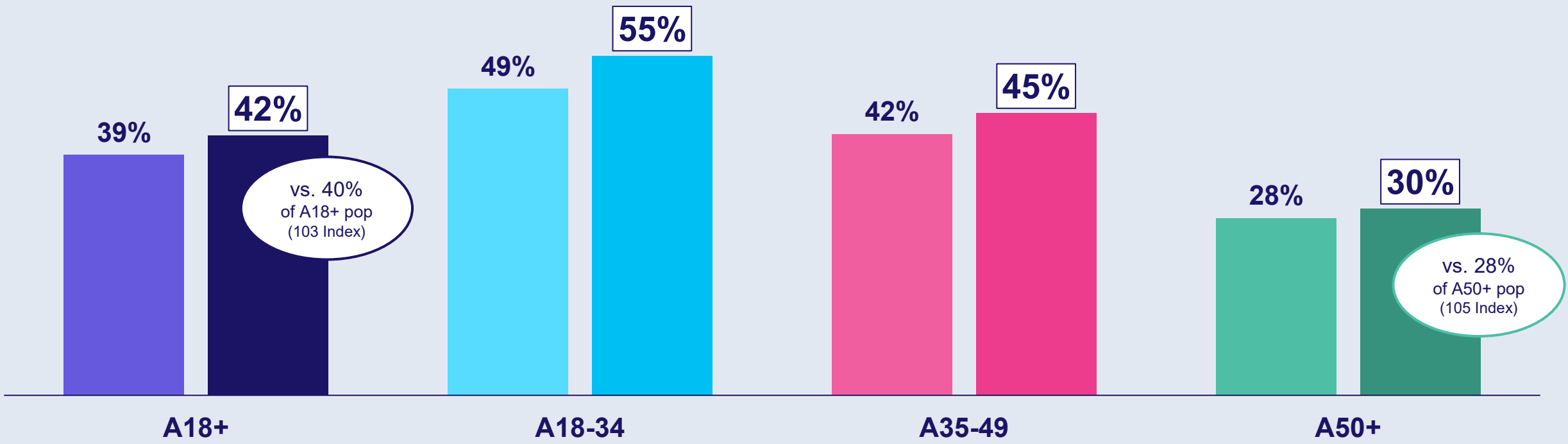
■ Pay-TV HHs ■ Non-Pay TV HHs



Source: Emarketer, *Pay TV Households & Viewers & Non-Pay TV Households & Viewers – U.S.*, October 2025. Note: Pay TV households are those with a subscription to a traditional or digital (vMVPD) pay TV service. Non-Pay-TV households are those without a subscription to a traditional or digital (vMVPD) pay TV service. Additional Note: Traditional pay TV services include cable, satellite, telecom and fiber operators, multiple system operators (MSOs), multichannel video programming distributors (MVPDs), and major TV broadcast and cable networks. Virtual multichannel video programming distributors (vMVPDs) are internet-delivered live TV services (e.g., Hulu + Live TV, Sling TV, YouTube TV). *VAB analysis of MRI-Simmons March 2026 Cord Evolution Study, A18+. Cord Cutters: no pay-TV; cancelled it, 'Cord Nevers': no pay-TV; never had it.

Multicultural audiences now account for over half of adult 18-34 streamers, underscoring their importance to multiscreen TV campaigns

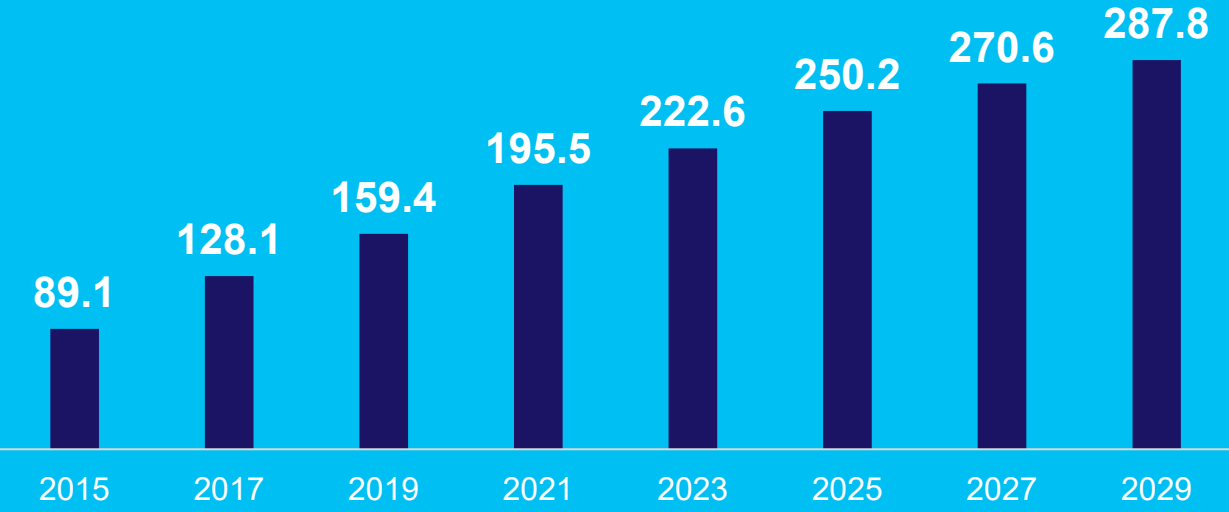
Multicultural Streaming Audiences
% of U.S. A18+ Streaming Population by Age
■ March '25 ■ March '26



Source: VAB analysis of MRI-Simmons March 2025 & March 2026 Cord Evolution Study, A18+. Base = 'Streamed in the past 12 months.' 'Multicultural Audiences' includes respondents who are of Spanish or Hispanic origin, non-Hispanic Black / African American, non-Hispanic Asian, non-Hispanic American Indian or Alaska Native and non-Hispanic other.

Smart TVs are now the standard in homes, with continued growth and increasing prevalence of households with multiple connected TVs

Smart TV Set Installed Base
In millions



% of Total TV Households



Average # of Smart TVs per HH



Smart TV % of Total TV Set Installed Base



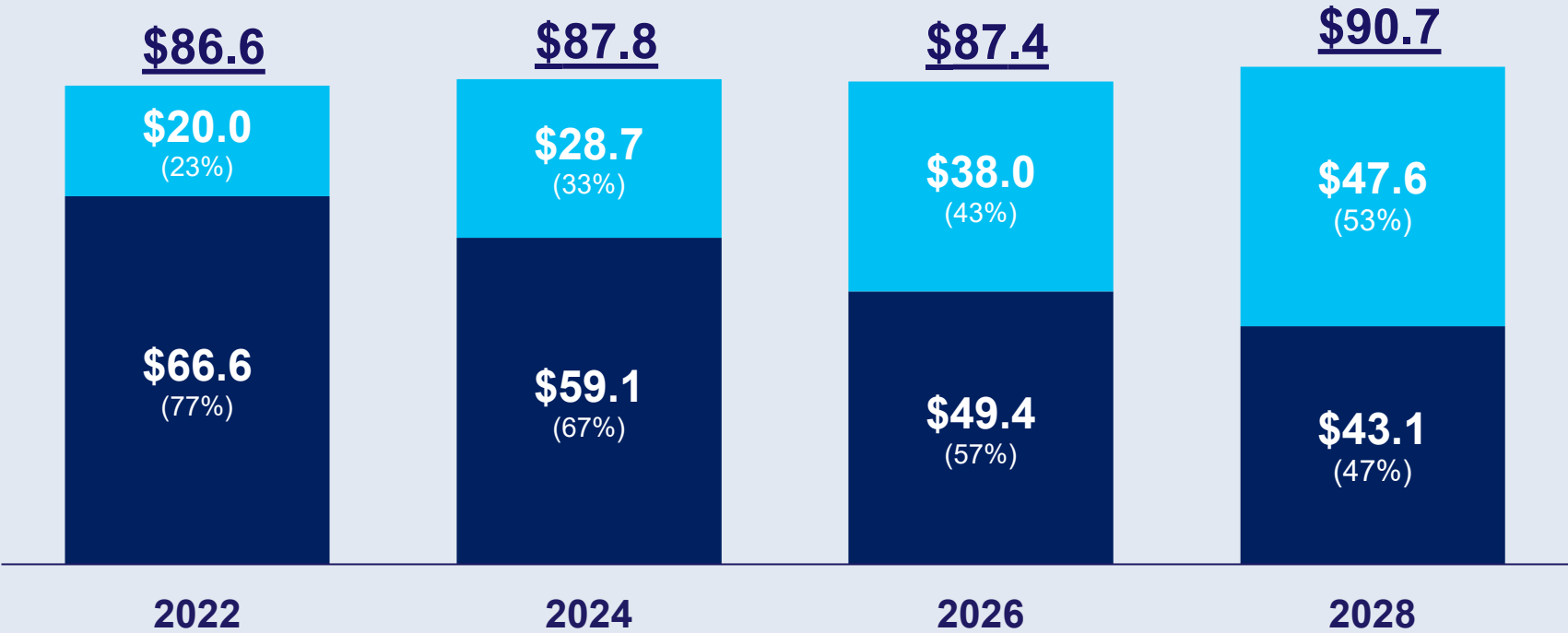
Source: Industry data; S&P Global Market Intelligence Kagan estimates. Data compiled October 2025. 'Installed Base' refers to the total number of units of a product currently in use by customers. Compound Annual Growth Rate (CAGR): 9.0%.

[Click here to download the full report, 'Left To Your Own \(Connected\) Devices – January 2026' to learn more about Connected TVs.](#)

Ad dollars within convergent TV are following audiences and steadily shifting share to CTV at a pace of 10 percentage points every two years

U.S. TV and Connected TV (CTV) Ad Spend
in billions

■ Traditional TV ■ CTV



Source: Emarketer, *U.S. Connected TV Ad Spending & U.S. TV Ad Spending*, December 2025. Note: CTV includes digital advertising that appears on CTV devices, includes display ads that appear on home screens and in-stream video ads that appear on CTVs from platforms like Hulu, Roku and YouTube, and excludes network-sold inventory from traditional linear TV and addressable TV advertising; traditional TV includes broadcast TV (network, syndication and spot) and cable TV, and excludes digital.

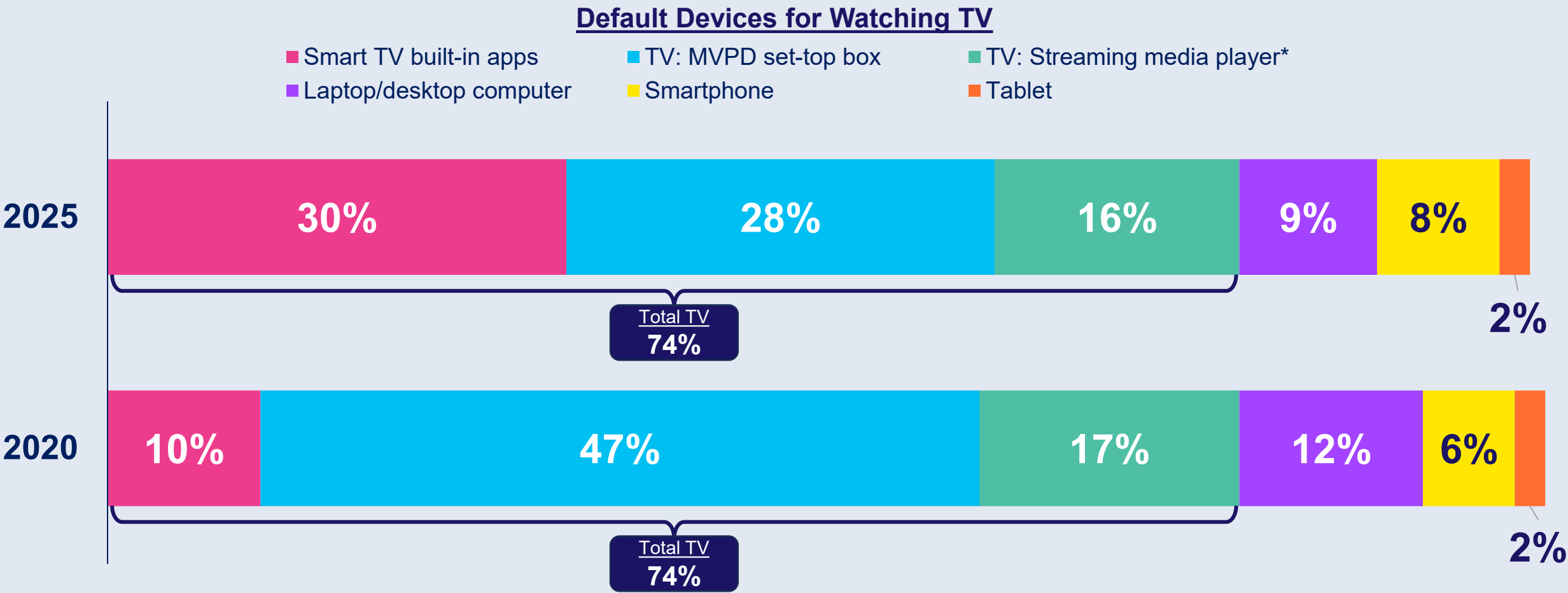
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Where Streaming Flows

The devices, platforms and viewing behaviors shaping TV



While TV as the device has remained very consistent, the entry point for watching content has shifted significantly towards smart TV apps

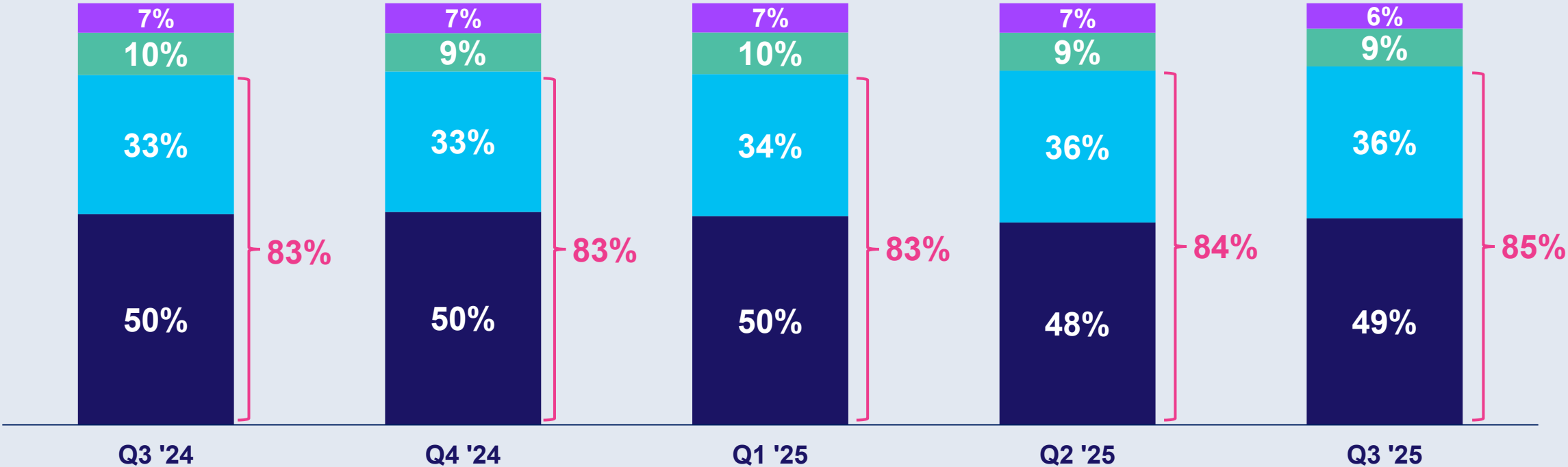


Source: Hub Entertainment, *Decoding The Default*, August 2025. Note: Smart TV built-in apps refer to both pre-installed apps and those that the owner installs. *TV: Streaming media player (net), e.g., Roku, Fire TV, Apple TV.

Streaming is accessed on 85% of all TVs while consumers are watching only streaming content exclusively across more than one-third of TVs now

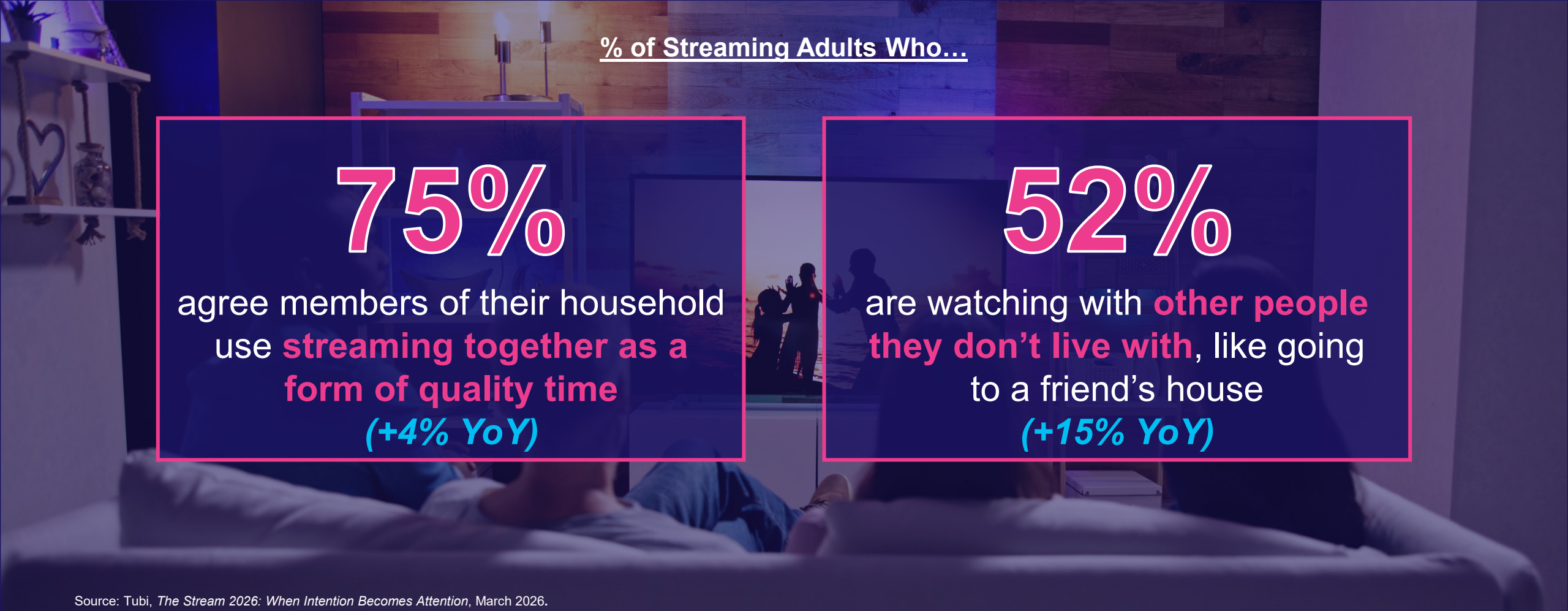
% of TVs by Access Type

■ Streaming & Cable / Satellite / OTA / vMVPD
 ■ Only Streaming
 ■ Only Cable / Satellite / OTA
 ■ Other Combinations



Source: Inscape, *TV Market Trends Report*, Q3 2025. Inscape Nationally Representative Panel, Base: 1hr+ of total viewing to at least one source type in quarter. Gaming console viewing is not included in these calculations. Results do not add up to 100% due to rounding.

Streaming serves as a shared experience, bringing viewers together for quality time with family at home and communal gatherings with friends



% of Streaming Adults Who...

75%

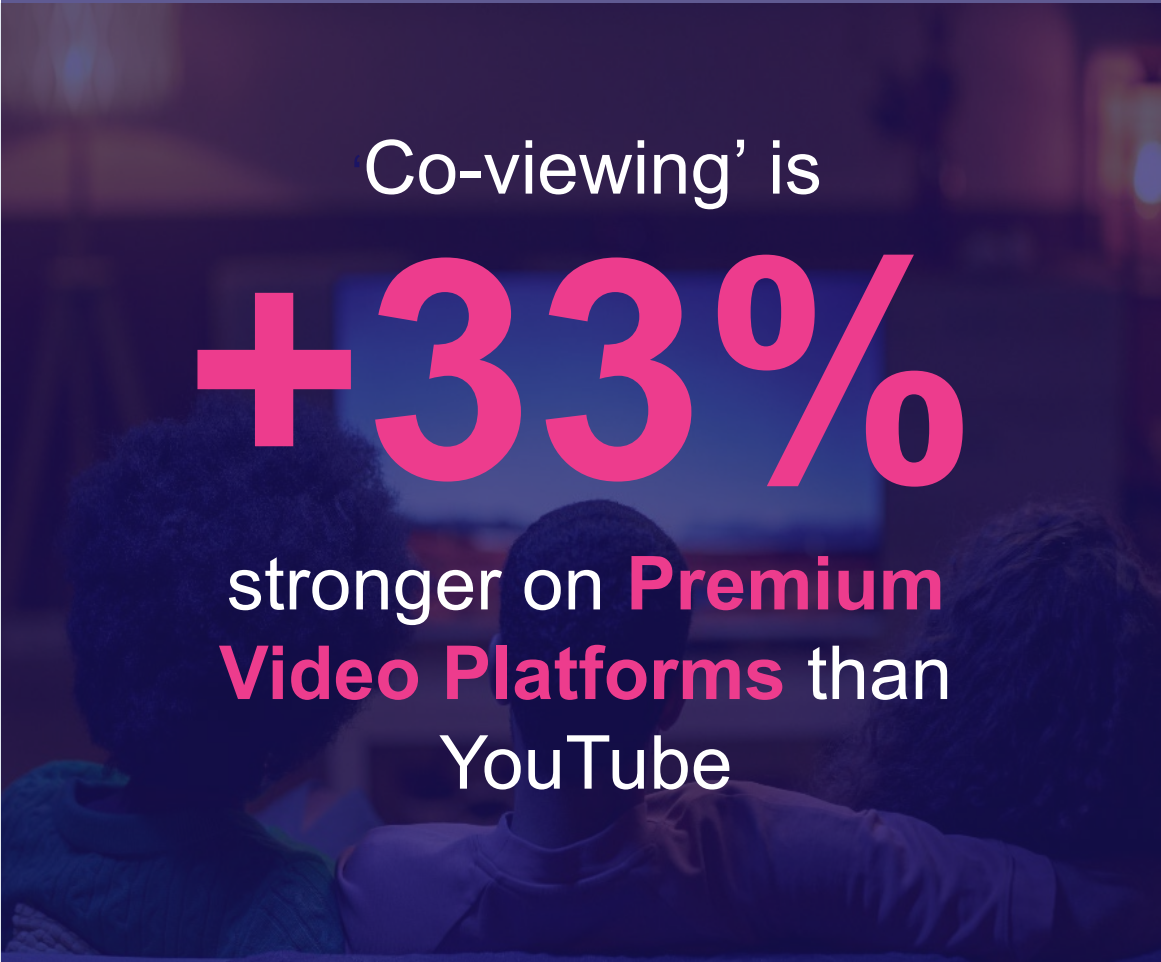
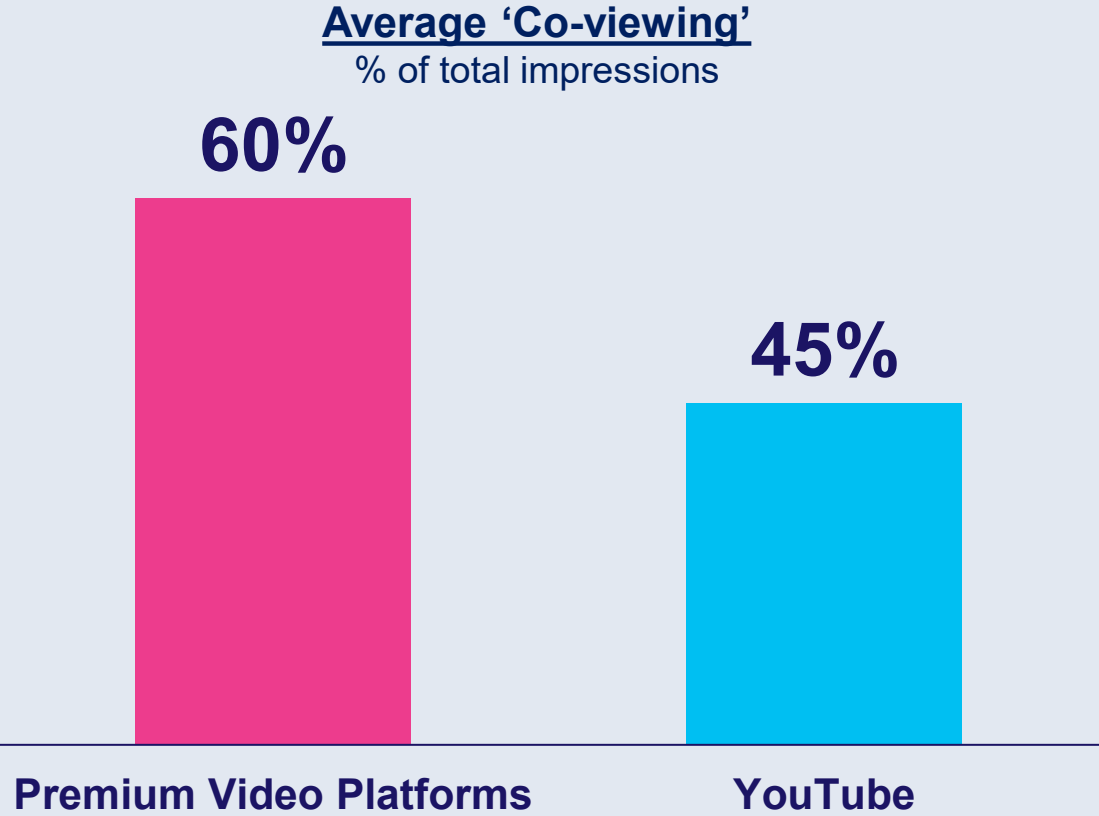
agree members of their household use **streaming together as a form of quality time**
(+4% YoY)

52%

are watching with **other people they don't live with**, like going to a friend's house
(+15% YoY)

Source: Tubi, *The Stream 2026: When Intention Becomes Attention*, March 2026.

Connected TV viewers are much more likely to be co-viewing with others on Premium Video Platforms vs. YouTube which drives greater ad recall

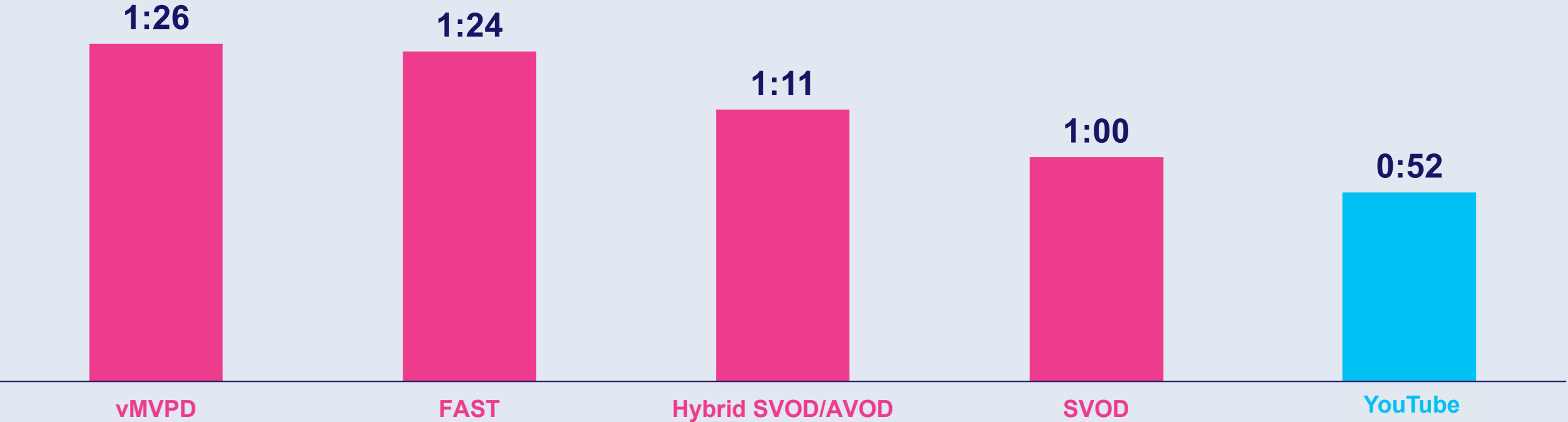


Source: VAB + TVision Custom Study. July 2024-June 2025. P2+. 'Co-viewing' indicates the % of total impressions that occur with another viewer in the room. Weighted based on share of impressions. Premium Video Platforms represent an average of the 21 Premium Video Platforms analyzed.

Click here to download the full report, ['The Impression Gap: What works harder for marketers on CTV - Premium Video or YouTube?'](#) to learn more.

Viewing sessions on CTVs are 49% longer for Premium Video Platforms than YouTube, which creates more opportunities for brand engagement

Average Session Length by App Type on CTV
hours, minutes across a 12-month time period

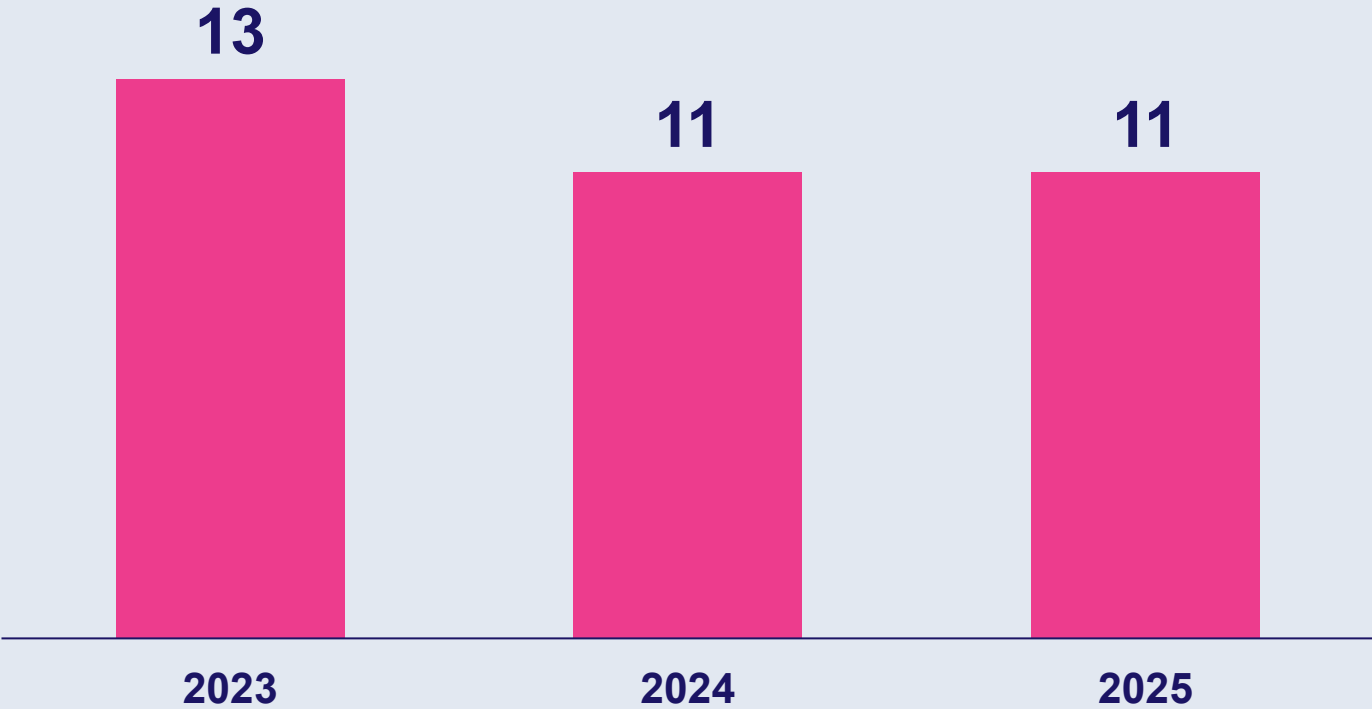


Source: VAB + TVision Custom Study. July 2024 – June 2025. P2+. Weighted based on duration of session.

[Click here to download the full report, 'The Impression Gap: What works harder for marketers on CTV - Premium Video or YouTube?' to learn more.](#)

Consumers total usage of streaming services across the year has recently plateaued as they sought to slightly consolidate their viewing options

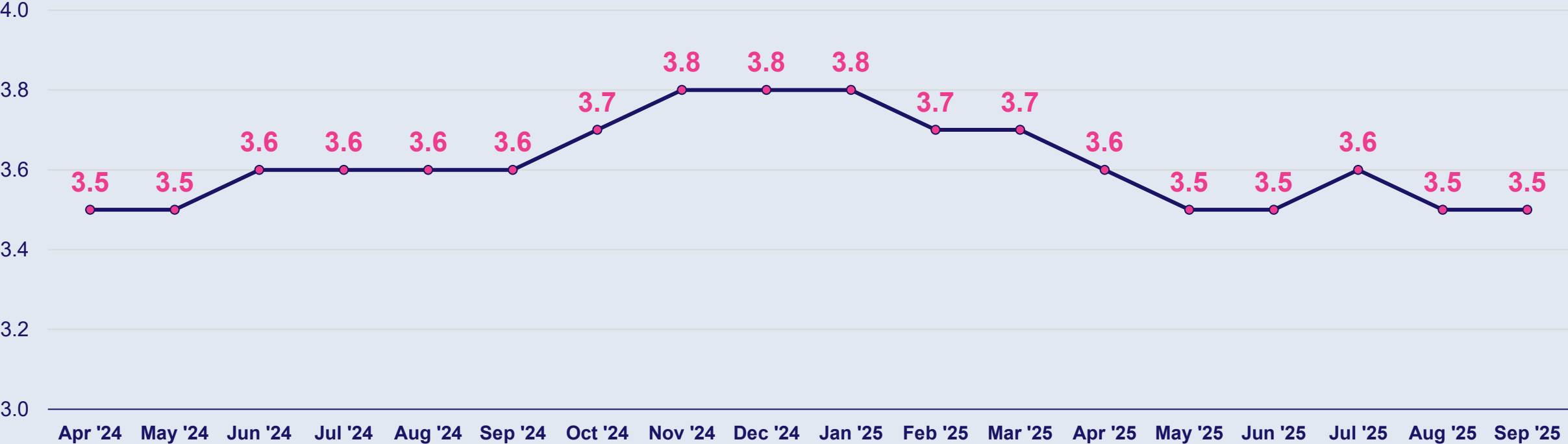
Average # of Streaming Services Used in the Past 12 Months



Source: MRI-Simmons, *Inside the TVideo Shift: How Consumers Watch, Choose, and Engage Today*, January 2026 & *From Cable to Clicks: The Evolution of American TV Habits*, January 2025. Audience insights from MRI-Simmons' 2025 & 2024 Cord Evolution Study. Streaming services Includes a mix of ad-supported, ad-free, paid subscriptions, free services and TV network apps.

Consumers use three to four streaming services habitually each month with a slight seasonal increase during Fall and Winter months

Average Number of Apps Used Monthly Per Streaming TV

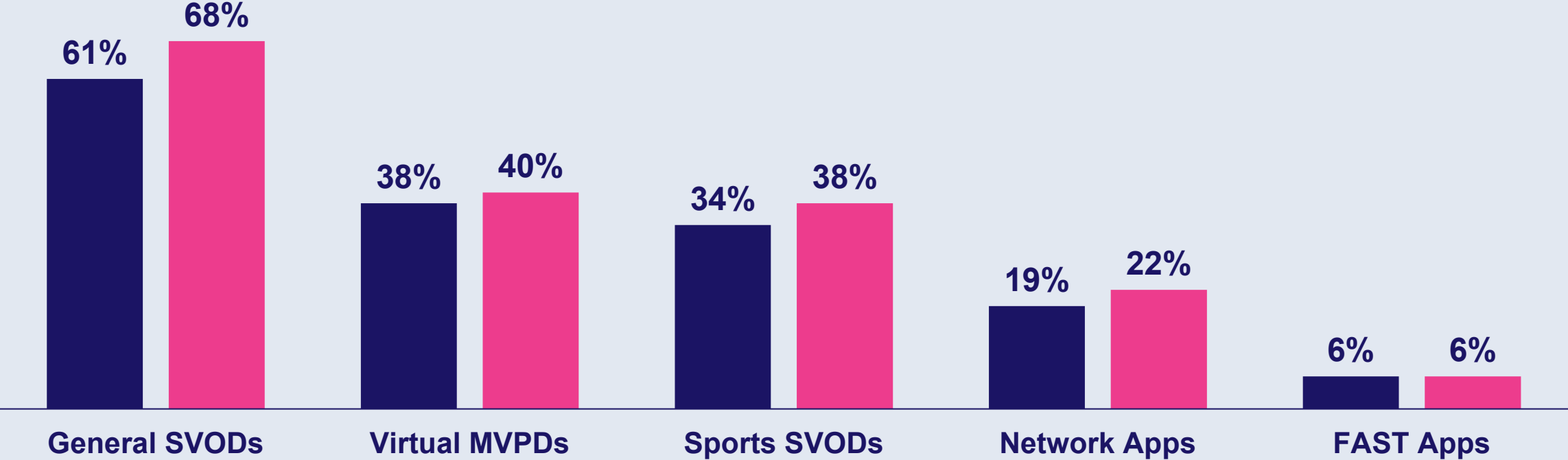


Source: Inscope, TV Market Trends Report, Q3 2025. Base: Opted-in Inscope TVs with at least 6 minutes of app viewing. Streaming includes viewership on vMVPDs. Gaming console viewing is not included in these calculations.

CTV app distribution adoption continues to grow for sports as the genre expands across streaming, with FAST services as an emerging opportunity

CTV Apps Used to Stream Sports

■ 2024 ■ 2025



Source: LG Ad Solutions, *Stadium to Screen: Streaming Live Sports in 2025*.

[Click here to download the full report, 'Fast Break: 20 Facts on Sports Fandom, Viewership & Advertising Impact'](#) to get more insights on sports streaming.

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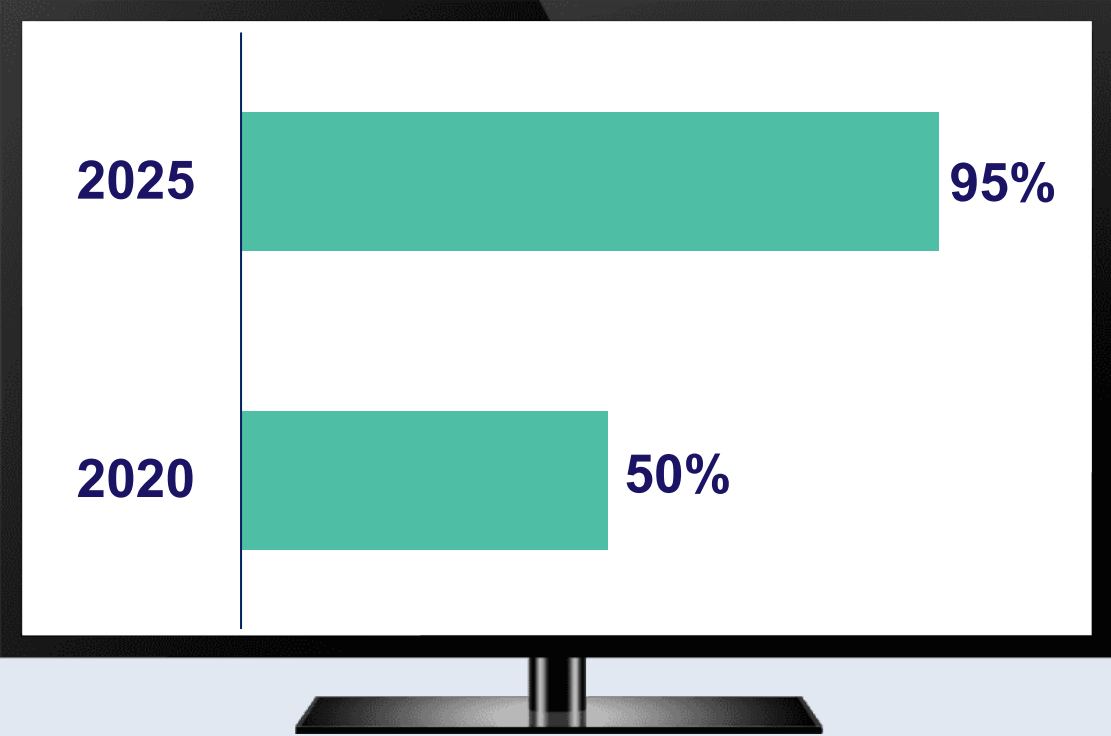
The Ad-Supported Wave

The rapid rise of ad-supported streaming across platforms



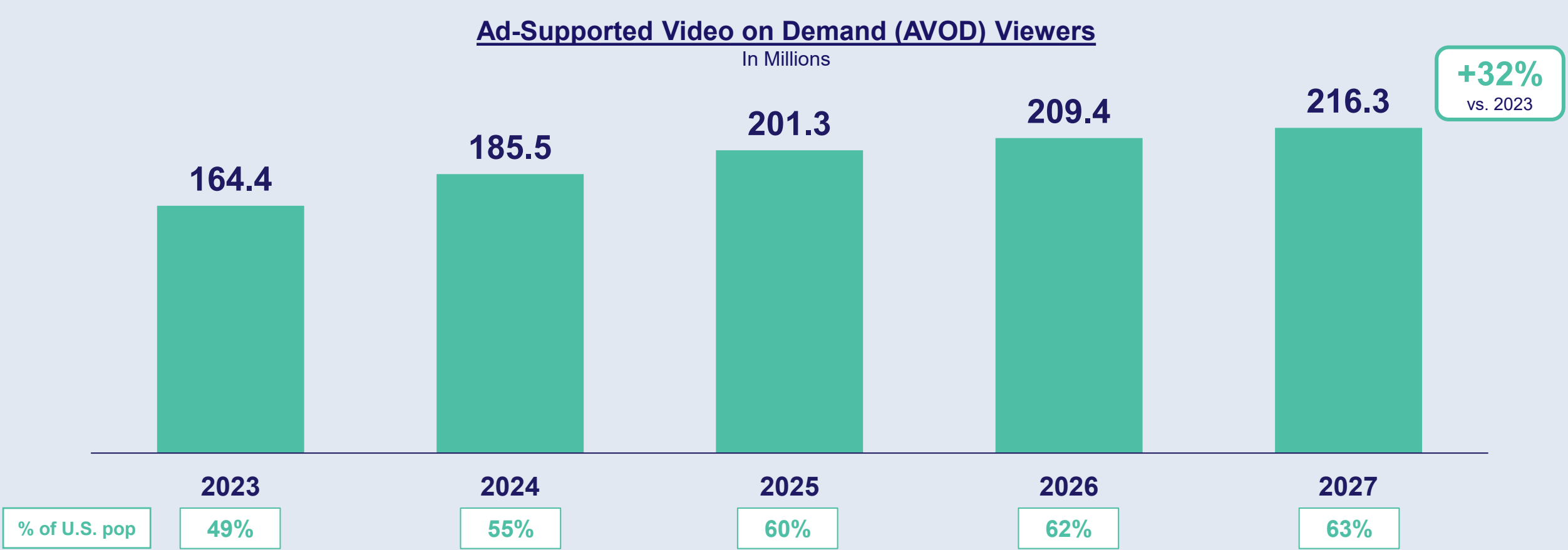
Nearly all CTV viewers see advertising on their home screens when they turn on their TV, even before they navigate to services and content

Share of U.S. CTVs with Home Screen Ads



Source: ESHAP Media, *War & Peace: The 2026 Agenda*, 1/5/26.

Ad-supported streaming services are viewed by almost 210 million consumers, providing a platform to reach nearly two-thirds of the U.S.

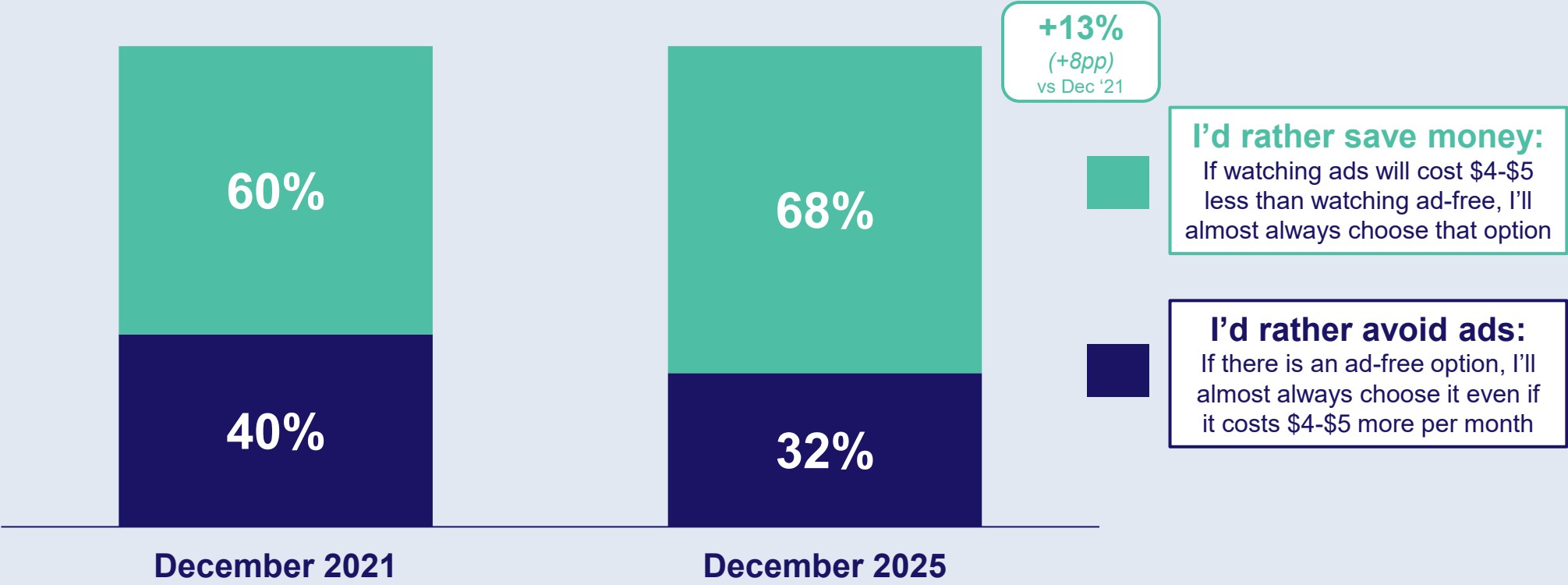


Source: EMARKETER, Ad-Supported Video on Demand (AVOD) Viewers, February 2026.

[Click here to download the full report, 'Staying Current on Streaming: The Latest on Connected TV Consumer Behaviors'](#) to get more key insights on ad-supported streaming.

More than two-thirds of viewers would choose watching ads in streaming content if it means saving more money each month

Which statement comes closest to how you feel about ads?

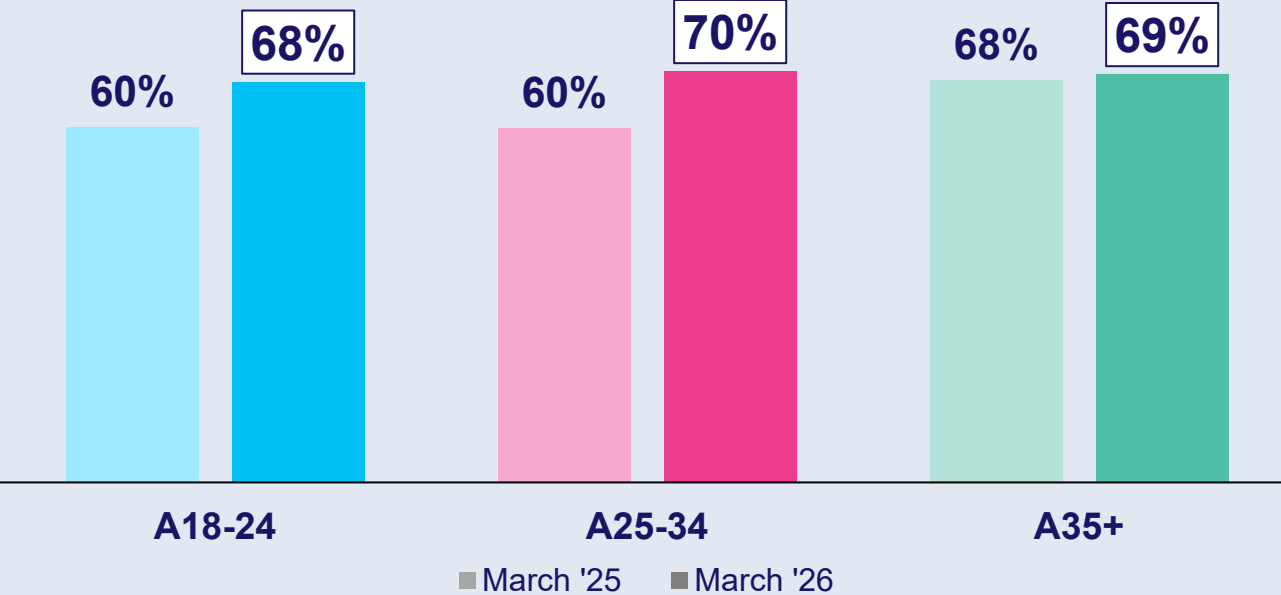


Source: Hub Entertainment, *TV Advertising: Fact vs Fiction*, December 2025.

Most audiences, especially younger demographics, actually prefer free streaming services with ads over ad-free subscriptions



'I prefer streaming free video content with ads / commercials instead of paying for a subscription without ads / commercials'
% of video streamers that agree

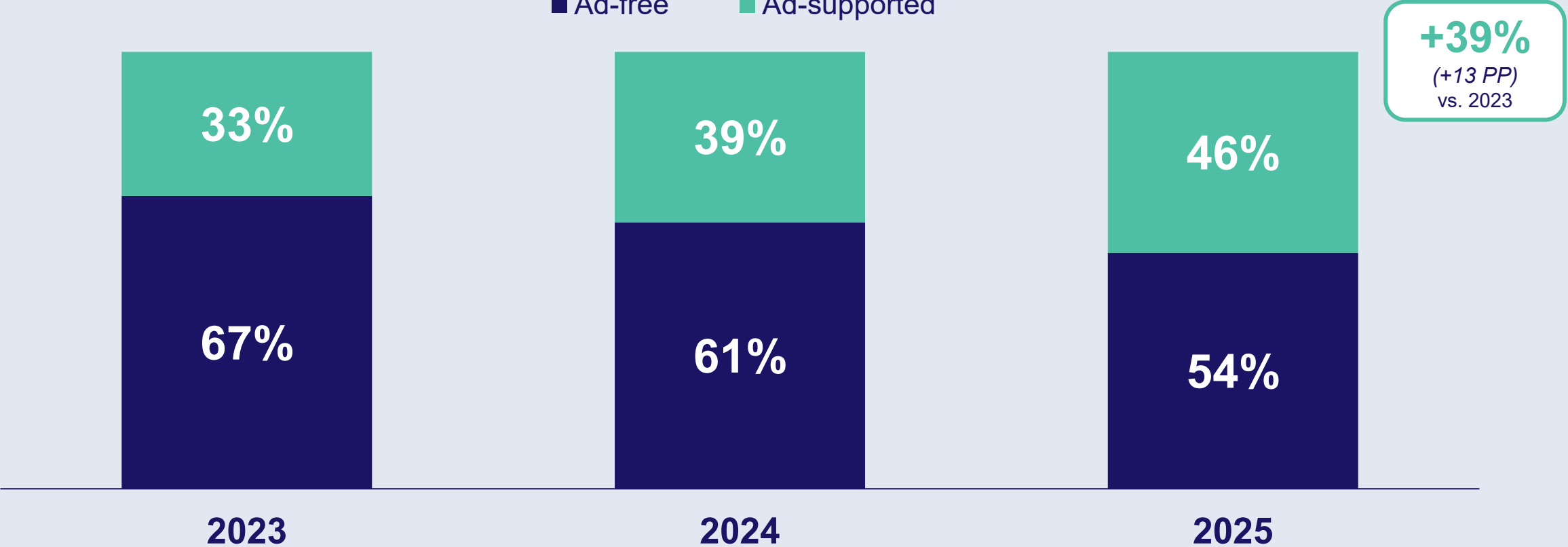


Source: VAB analysis of MRI-Simmons March 2025 & March 2026 Cord Evolution Study, A18+. 'I prefer streaming free video content with ads/commercials instead of paying for a subscription without ads/commercials' (strongly / somewhat agree). Base = 'Streamed in the past 12 months'.

Nearly half of all streaming subscriptions are now for ad-supported tiers and services, as consumers shift their consumption preferences

Premium SVOD Subscriptions by Plan Tier

■ Ad-free ■ Ad-supported



Source: Antenna, *State of Subscriptions: Adds & Ads*, May 2025. US-only. Excludes Apple TV+, Starz, Free Tiers, MVPD + Telco Distribution and select Bundles. Premium SVOD services with an ad plan are included: Discovery+, Disney+, Hulu, Max, Netflix, Paramount+ and Peacock.

Streaming's share of TV advertising time is incrementally growing alongside a consumer shift towards ad-supported platforms and services

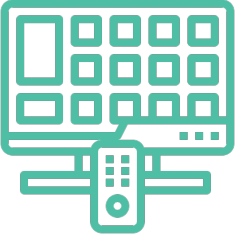
National Share of Ad Time by Platform

■ Broadcast (15 networks) ■ Cable (125 networks) ■ Streaming (50 networks)




Source: Comscore, *The Scoreboard - Holiday Viewing Lifts Streaming Ad Time in December*, February 2026. Comscore share of ad time data, rolling four-week periods ending during broadcast months of September to December 2025. Includes measurements of all ads, including linear-originating, streaming-originating, national, and local for all 210 markets tracked by Comscore. Share of ad time is based on publisher-specific entities across broadcast networks, cable networks, and streaming services.

FAST platforms and services are achieving meaningful scale as viewership becomes more habitual and advertising opportunities increase




+57%
increase in number of FAST channels
in 2025 vs. 2023



+19%
increase in FAST viewers
in 2025 vs. 2022



+54%
increase in time spent with FAST
in 2025 vs. 2022



+25%
increase in average channel sessions duration
in 2025 vs. 2024

Source: VAB, *Free For All: Understanding The Growth of FAST Through Three Key Questions*, October 2025.

[Click here to download the infographic, '6 Fast Facts on FAST: Understanding the FAST Ecosystem' to get more key insights on FAST.](#)

Retail media on CTV is steadily growing while expanding data partnerships and shoppable ad opportunities on streaming platforms

▶ CTV retail media ad spending is projected to double over a five-year period between 2025 - 2029

U.S. Retail Media Connected TV Ad Spending
\$ in billions



Sampling of Recent News about Retail Media

RETAIL DIVE 6/26/25
QVC and HSN head to Philo: As the company hones in on livestreaming e-commerce, the partnership with Philo TV guarantees new viewers for QVC Group.

Walmart 9/1/25
Walmart+ Celebrates 5th Anniversary With Expanded Video Streaming Choices

MARKETING BREW 1/7/26
What 2026 has in store for commerce media, according to experts
 Brands may seek out buying simplicity, and AI agents could mean a “battle for the soul of retail media,” one executive said.

DIGIDAY 7/8/25
RETAIL MEDIA’S MID-2025 REALITY: WHY ADVERTISERS ARE GOING ALL IN ON FULL-FUNNEL

DIGIDAY 1/9/26
Walmart Connect takes a play out of the Amazon playbook to make agentic AI the next battleground in retail media

Source: Emarketer, *U.S. Retail Media Connected TV Ad Spending*, December 2025. Note: Digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer’s media network or demand-side platform (DSP); examples of websites or apps primarily engaged in retail ecommerce include Amazon, Walmart, and eBay; examples of retail media networks include Amazon’s DSP and Etsy’s Offsite Ads; includes ads purchased through retail media networks that may not appear on ecommerce sites or apps. Additional Note: Includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms.

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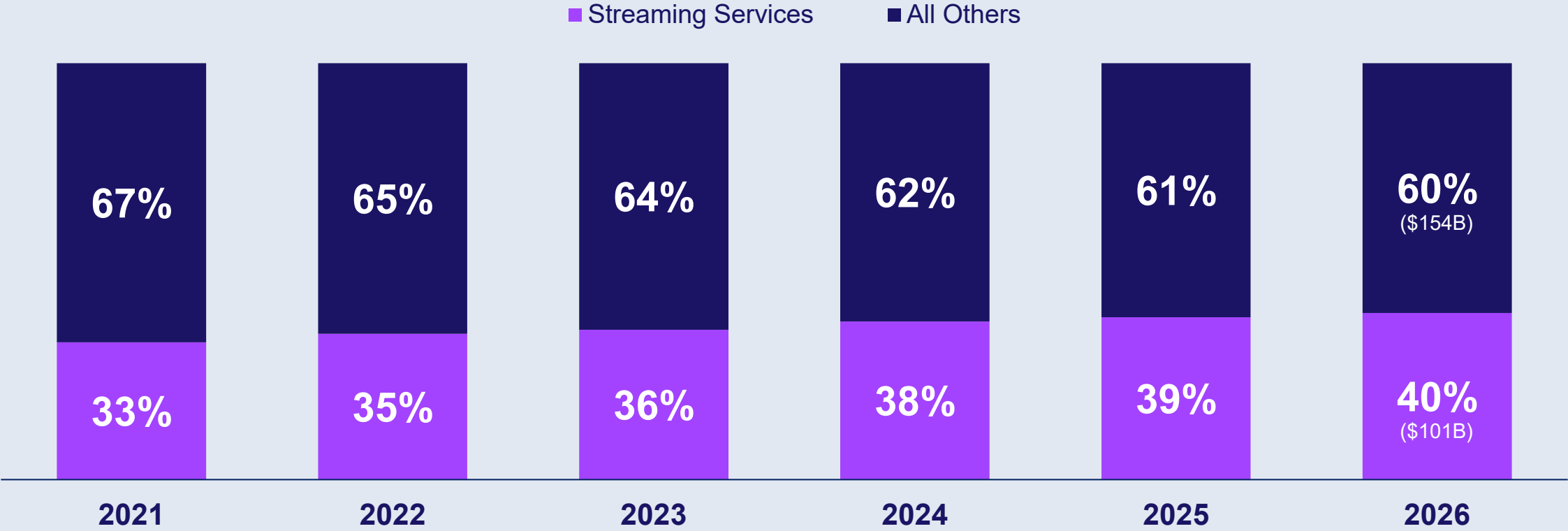
High Tide for Quality

Entertainment content and live sports & news are powering growth



Content spend is following audiences' evolving video consumption habits as platforms increasingly invest in 'streaming-first' programming

Global Content Spend by Company Type
% Share

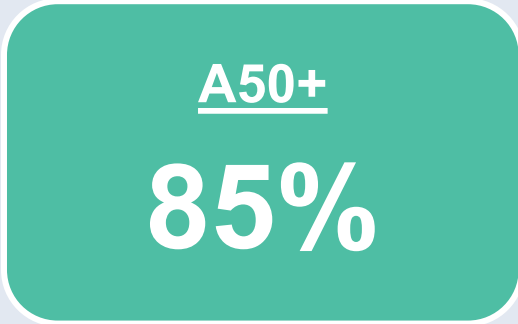
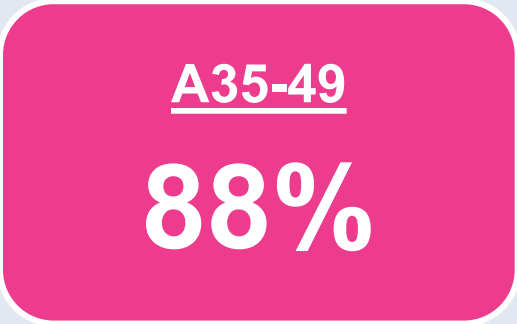
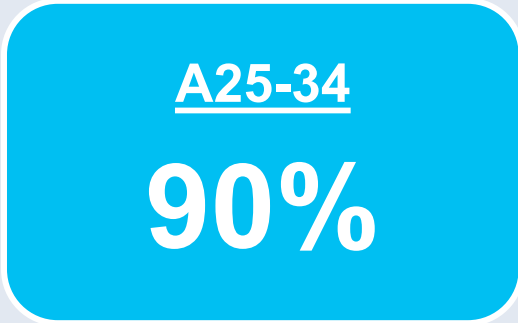
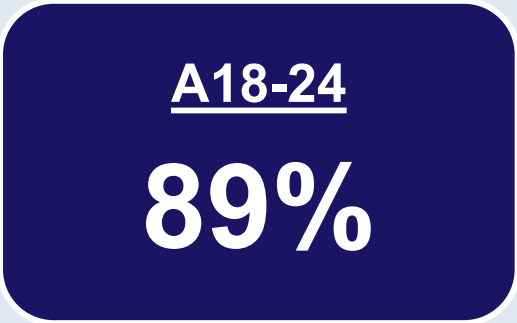


Source: Ampere Analysis, January 2026. 'All Others' include commercial broadcasters, public broadcasters, theatrical studios and Pay-TV networks.

The desire for professionally produced, premium video content across multiscreen TV streaming services is quite ubiquitous across all audiences



% of streamers who have used a network TV app or streaming service owned by a multiscreen TV company Last 30 days*



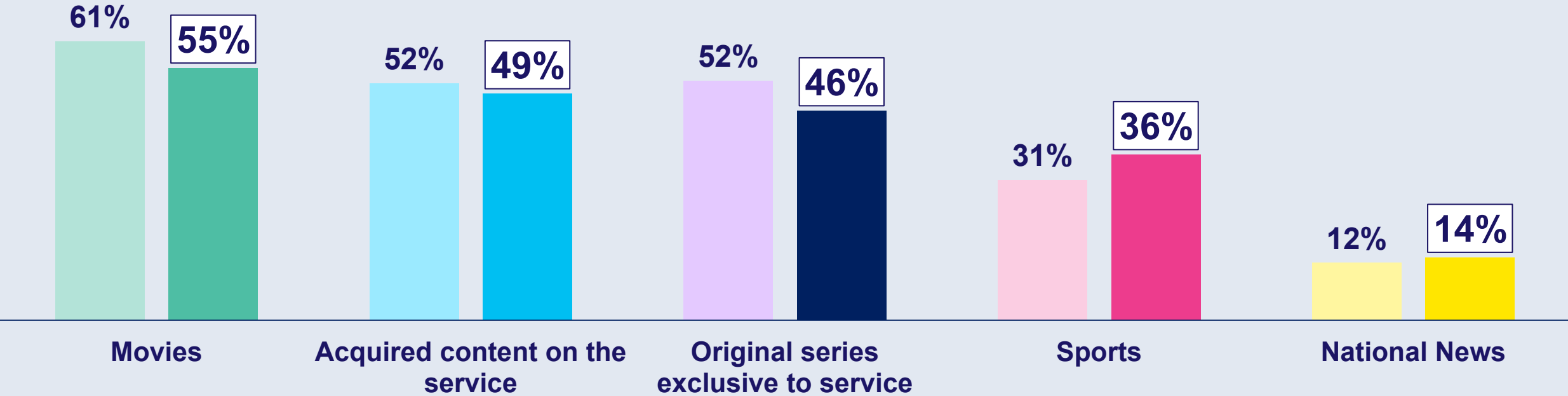
Source: VAB analysis of MRI-Simmons March 2026 Cord Evolution Study, A18+. *Q: Non ad-supported and ad-supported streaming services used in the past 30 days. Base = 'streamed in the past 12 months'. Note: To be considered a multiscreen TV app you must be a TV network, or an associated streaming app (e.g., Adult Swim, NBC) or an MVPD app (e.g., Spectrum, Xfinity) or a service owned by one of the major multiscreen TV companies (e.g., Disney+, Max, Paramount+).

Viewers have a growing desire for sports and news content on streaming beyond the ever-popular entertainment genres of movies and TV series

Top Drivers to Use / Subscribe to a Streaming Service*

% of streamers

■ March '25 ■ March '26



Source: VAB analysis of MRI-Simmons March 2025 & March 2026 Cord Evolution Study, A18+. Base = 'streamed in the past 12 months'. Original series - e.g., Stranger Things, Handmaids Tale, The Crown, etc. Movies - Old and new releases. Acquired content – Includes 'Series that no longer air on traditional TV networks (e.g., Friends, How I Met Your Mother, Friday Night Lights, etc.)' & 'Series that are currently airing on traditional TV networks (e.g., The Walking Dead, The Good Place, This Is Us, etc.)', Sports – Includes 'Sports events the service streams (e.g. Football, Soccer, etc.)' & 'Sports talk/debate/betting show' (e.g. First Take, Around the Horn, etc.).

Live sports has seen significant CTV viewership growth as leagues, such as the NFL, expand their presence across streaming services

% of streamers that...

60%

Like to stream live sports

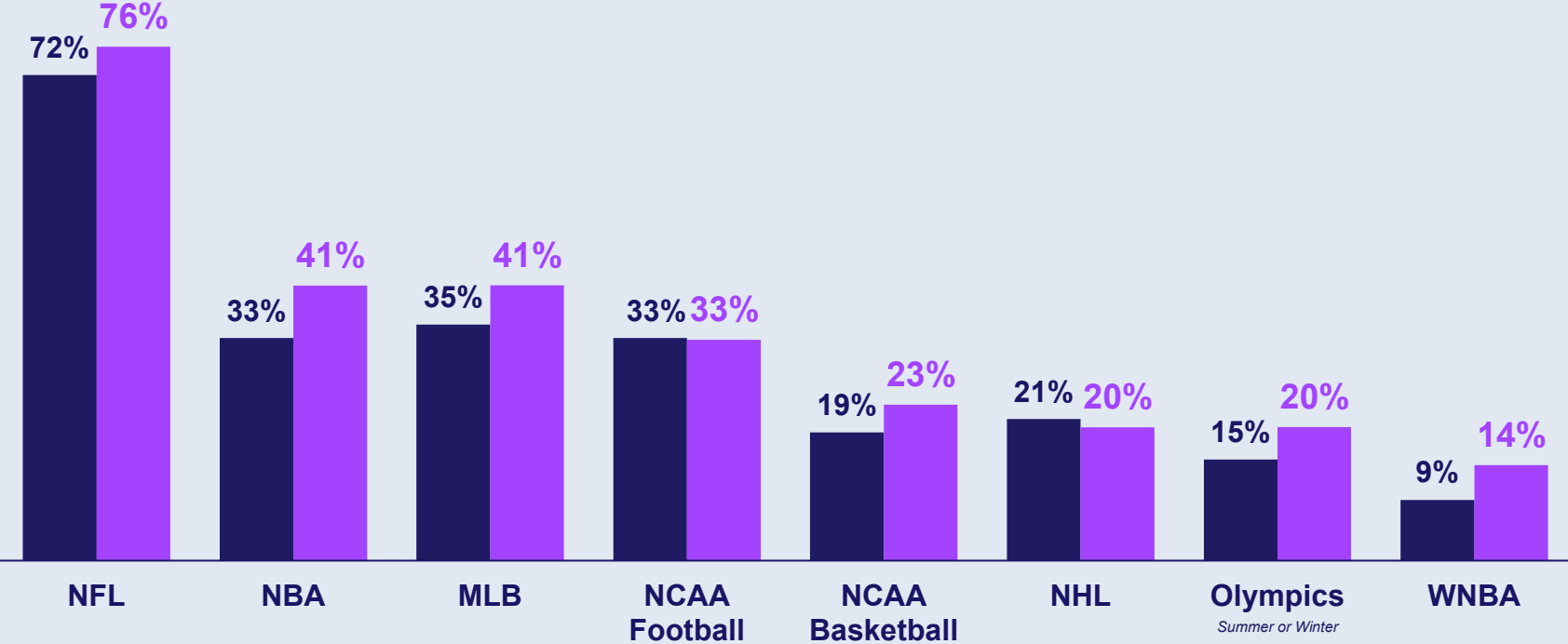
40%

Have streamed sports in the last month

Which of the following sports have you streamed live in the last 12 months?

% of sports streamers

■ March 2024 ■ March 2026



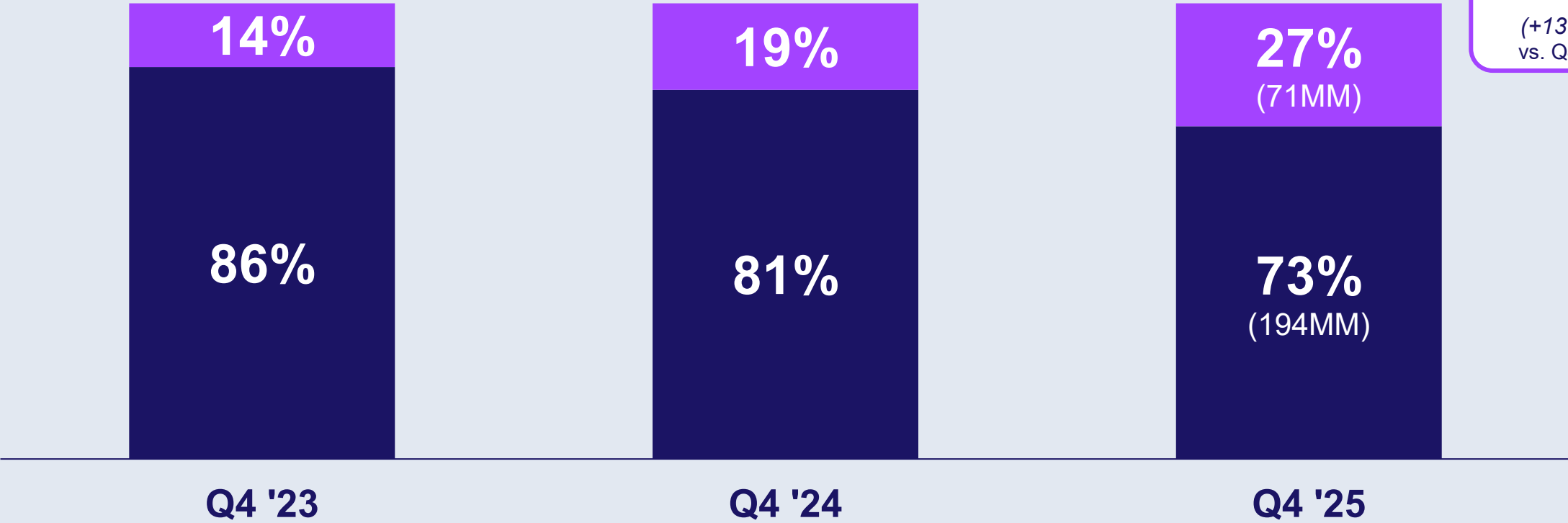
Source: VAB analysis of MRI-Simmons Cord Evolution March 2024 (fielded Jan 16, 2024 - Jan 28, 2024) & March 2026 (fielded Jan 19, 2026 - Feb 2, 2026) studies, Base: has streamed live sports in the last 30 days. Note: Olympics can include people streaming relevant content such as replays, highlights and other related programming after the Olympics have aired.

Click here to download the full report, ['What are the most popular sports to reach audiences through streaming?'](#) to see multicultural sports streaming insights and more.

More than one-quarter of subscriptions are bundled with multiple services as consumers look to access more content while gaining cost efficiencies

Premium SVOD Subscriptions by Bundle Type

■ Non-Bundle ■ Bundle



+52%
(+13 PP)
vs. Q4 '23

Source: Antenna, *State of Subscriptions: Premium SVOD – 2025 Year in Review*, February 2026. US-only. Excludes Free Tiers, MVPD + Telco Distribution, and select Bundles. Note: Bundles exclude consumers who get access to services included in broad intracompany bundles (e.g., Amazon Prime Video and Amazon Music within Amazon Prime) or inter-company bundles (e.g. SVOD service included at no additional charge in a Comcast Xfinity 200 channel package).

Key Marketer Takeaways

The 'rising tides' of streaming are creating more opportunities for ad investment in premium video

- ▶ With streaming reshaping consumer perceptions of TV, more ad dollars are shifting across multiscreen premium video platforms to follow evolving viewer behaviors
- ▶ As audiences streamline their streaming services and become more intentional with how they consume content, Premium Video platforms offer marketers an opportunity to connect with communal audiences that creates sustained viewing experiences
- ▶ Consumer appetite, preference and adoption for ad-supported tiers and services on streaming are growing, creating greater scale for brands to reach highly engaged audiences across AVOD, SVOD, FAST & vMVPD platforms
- ▶ Viewers gravitate towards services that create, and invest in, high quality content – such as movies, original series, acquired libraries and live sports & news – providing marketers the opportunity to reach highly engaged audiences in premium video environments

Creators

Jason Wiese

EVP, Strategic Insights & Measurement
jasonw@thevab.com

Karolina Guillen

Associate Director, Insights, Strategy & Analytics
karolinag@thevab.com

Reed Kiely

VP, Data Insights & Trends
reedk@thevab.com

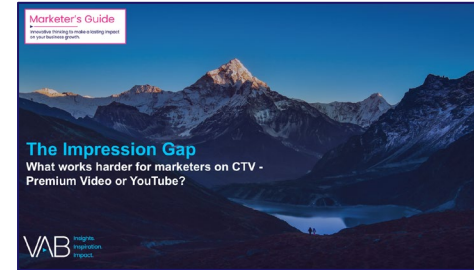
Amanda Cashman

Insights Analyst
amandac@thevab.com

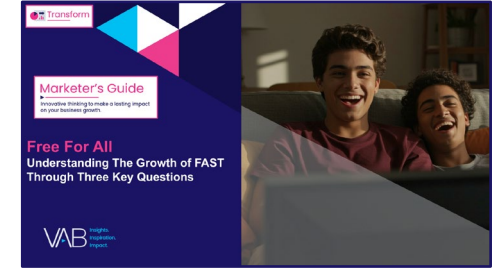
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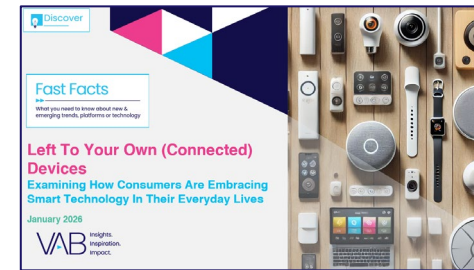
Visit our [Streaming Video Resources Hub](#)
for the latest consumption stats, trends and
advertising opportunities.



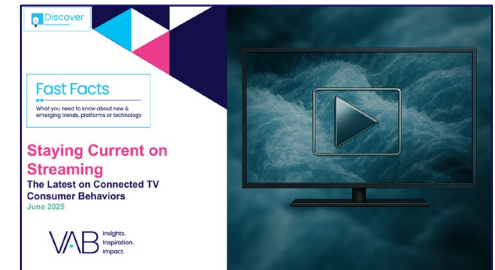
The Impression Gap
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Free for All
Understanding the Growth of FAST Through Three Key Questions



Left To Your Own (Connected) Devices
Examining How Consumers Are Embracing Smart Technology In Their Everyday Lives – Jan '26



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



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



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

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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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