

*Your guide to
unlocking value through
the linear + streaming
multi-platform ecosystem*

The new

**ad supported
universe**

The synergies of linear and ad supported streaming

**2026 Upfront
Planning Series**

 Nielsen

The breakdown

Rather than moving away from ads, the audience is moving across a more sophisticated, three-pillared system: linear TV, FAST platforms, and other **ad supported streaming**.

Of the 63.8% of time 18-49 year olds spend with ad supported TV, streaming now accounts for 66.7% of it, proving that despite the noise of ad free alternatives, ad supported streaming is an essential part of the TV viewing diet for younger audiences.

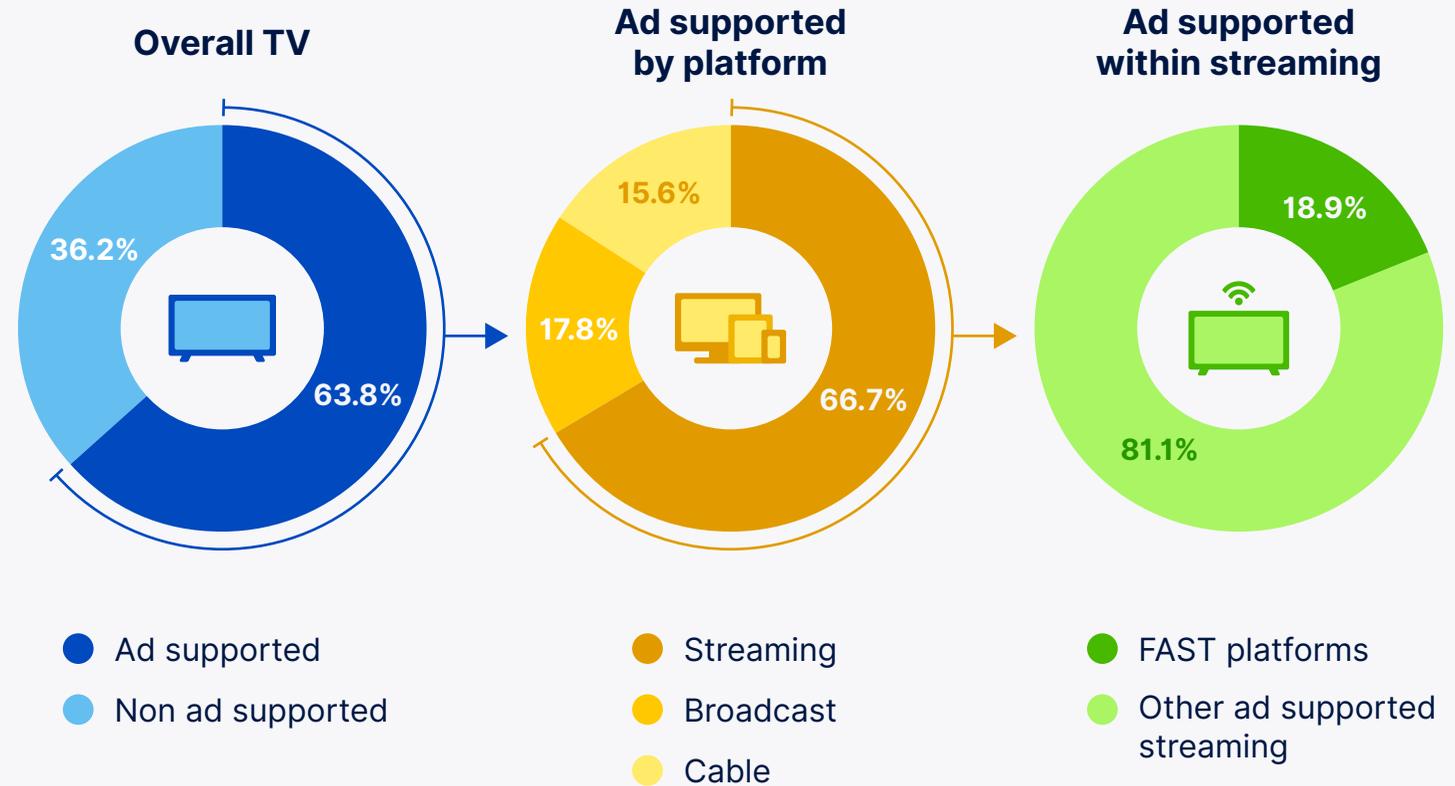
Within the streaming ecosystem, 81.1% of viewing for 18-49 occurs on "other ad supported" platforms like YouTube, Hulu, Prime Video, Peacock, and Paramount+. These platforms often provide an attractive library of content, originals, and sports that draw viewers in.

The other 19% of time goes to FAST platforms, which offer free, frictionless access to content from a wide variety of sources.

Linear remains critical for live sports, events, and news. Primetime dramas on broadcast and movies on cable are also top genres for the adult 18-49 demographic specifically.

Figure 1.2

How ad supported viewing breaks down for adults 18-49



Source: Analysis of 4Q25 (9/29/25 - 12/28/25, Nielsen National TV Panel Data augmented by Streaming Platform Ratings
 Ad supported includes broadcast and independents, ad supported cable, and streaming minus non ad supported streaming
 FAST platforms are the aggregation of viewing from LG Channels, Pluto TV, The Roku Channel, Samsung TV+, Tubi TV, Vizio Watchfree+, and Xumo Play
 Other ad supported streaming includes the ad tiers of Prime Video, Netflix, HBO Max, Discovery+, Peacock, Paramount+, Disney streaming properties, and YouTube*
 *YouTube includes YouTube Premium activity

A powerhouse era for live sports

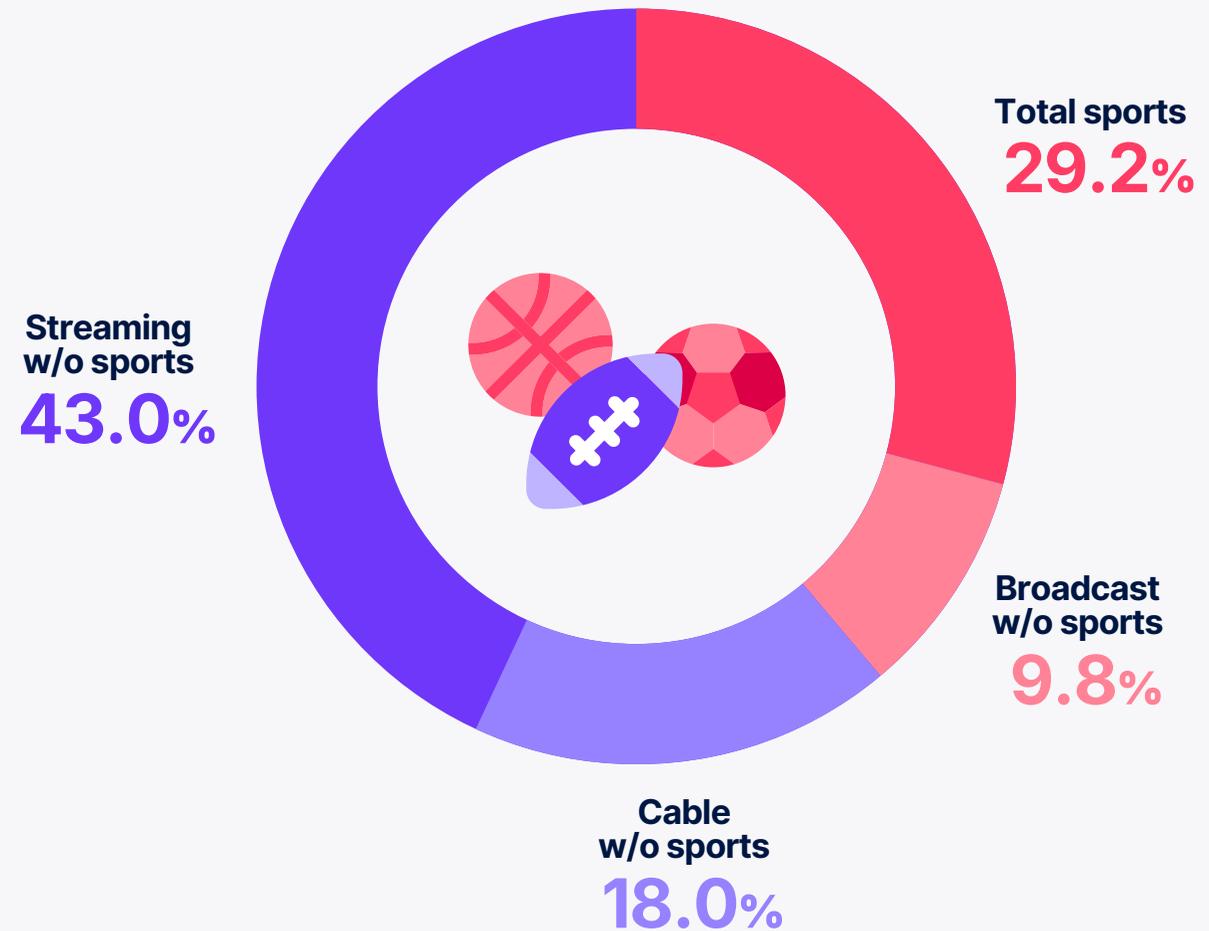
While live sports have been a cornerstone of the viewing experience for decades, there has been a noticeable shift in how audiences prioritize 'must-see' sports moments. From the rise of breakout athletes to the expansion of emerging leagues, sports increasingly serve as the **cultural anchor** for a fragmented audience. At the same time, access to sporting events has evolved, with more major events expanding into streaming.

The fourth quarter of 2025 served as a powerful time for sports, with the NFL, college football, the Major League Baseball postseason, and the start of the NBA season all in play. During this time, sports events accounted for a whopping 29% of all ad supported viewing across broadcast, cable, and streaming.

Figure 1.1

Sports accounted for nearly 30% of all ad supported TV viewing in 4Q25

P25-54 Share of ad supported television, 4Q25



Source: Analysis of 4Q25 (9/29/25 - 12/28/25, Nielsen National TV Panel Data augmented by Streaming Platform Ratings ad supported includes broadcast and independents, ad supported cable, and streaming minus non ad supported streaming Sports Event Summary type and live streaming events excluded from broadcast, cable, and streaming buckets and re-aggregated

Different platforms, complementary audiences

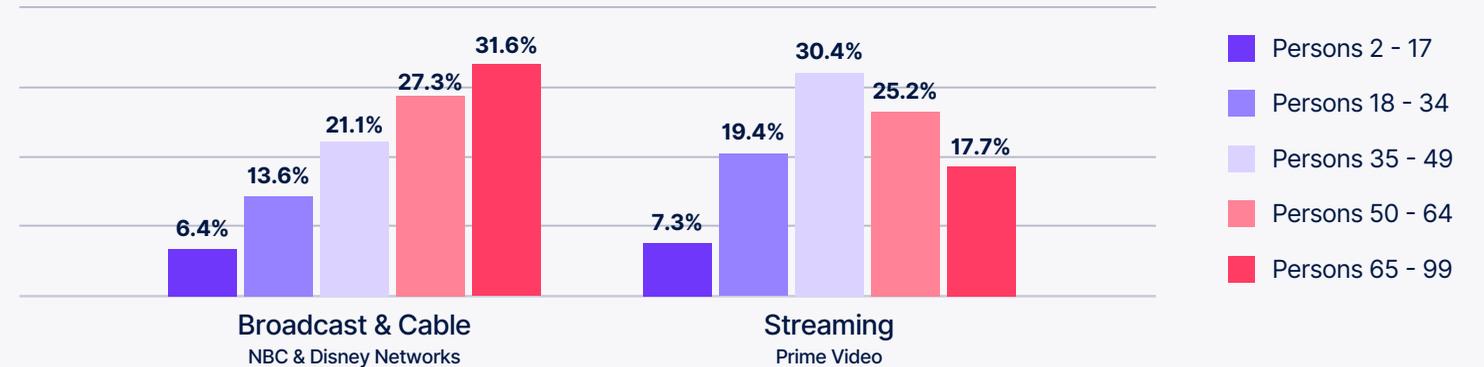
The evolution of the NBA's distribution is a perfect case study for the new multi-platform reality of live sports. The addition of NBC provides broad reach across fans of all ages, while streaming games on Prime Video brings younger digital natives who watch less linear TV into the fold.

Importantly, the concentration of an audience is different from the volume. So while Prime Video delivers a higher percent composition of adults 18-34 with its streams, NBC attracts a comparable number of adults 18-34. Meanwhile, ABC and ESPN average the highest number of viewers in this demographic.

The unique age profiles of each platform might attract different advertisers, or together they can serve to extend the reach for the same brand. Whatever the case, this multi-platform strategy leverages the high impact environment of live sports, and the NBA has reaped the benefits of its new distribution model, increasing viewership by 18% so far this season.

Figure 1.2

NBA regular season audience composition: Linear vs. Streaming



Source: Nielsen Big Data Plus Panel, NBA regular season through January 2026

Figure 1.3

Average NBA regular season viewership adults 18-34 by platform



Source: Nielsen Big Data + Panel, NBA regular season through January 2026

About Nielsen

Nielsen shapes the world's media and content as a global leader in audience measurement, data and analytics. Through our understanding of people and their behaviors across all channels and platforms, we empower our clients with independent and actionable intelligence so they can connect and engage with their audiences—now and into the future.

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