

State of ***play***

**Data is the key to solving the paradox
of choice for streaming viewers**

Welcome

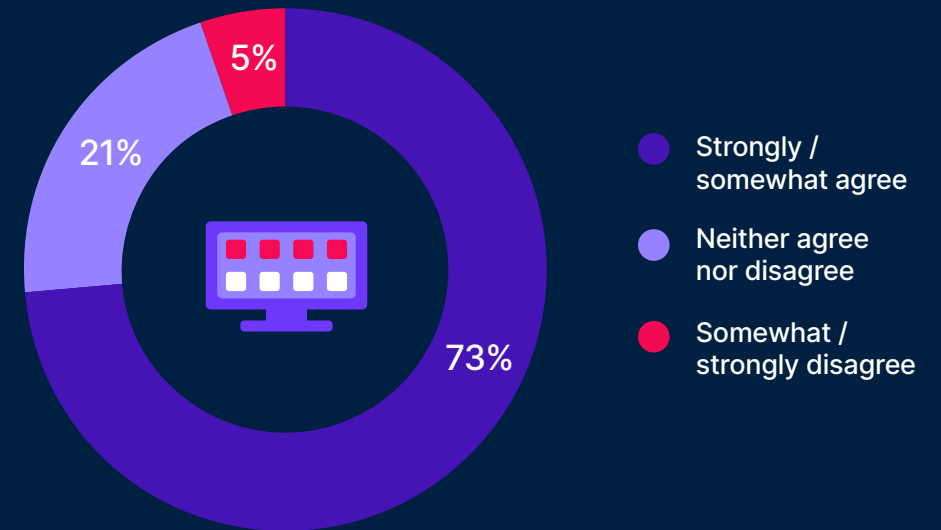
A little more than a decade after freeing TV audiences from the confines of linear programming, streaming has expanded to a point where many viewers miss the tactical guidance that holistic TV schedules once provided.

Viewers remain enamored with their streaming experiences, but without anything to tether the web of expanding options, many are flying blind, unsure of what's available, where to find it and whether they have access to it.

More than 46% of streaming viewers agree that it's getting harder to find the content they want to watch because there are too many streaming services

Fragmentation has become the new norm, but it doesn't have to disrupt the TV experience. While the content landscape is scattered and siloed, future-focused content providers should be leveraging holistic data sets that allow them to develop boundary-free experiences that better connect audiences with the content they're looking for.

TV viewers love their streaming experiences



Read as: 73% of streaming viewers say they strongly / somewhat agree that they love their experience with their streaming services.
Source: Gracenote 2025 streaming consumer survey

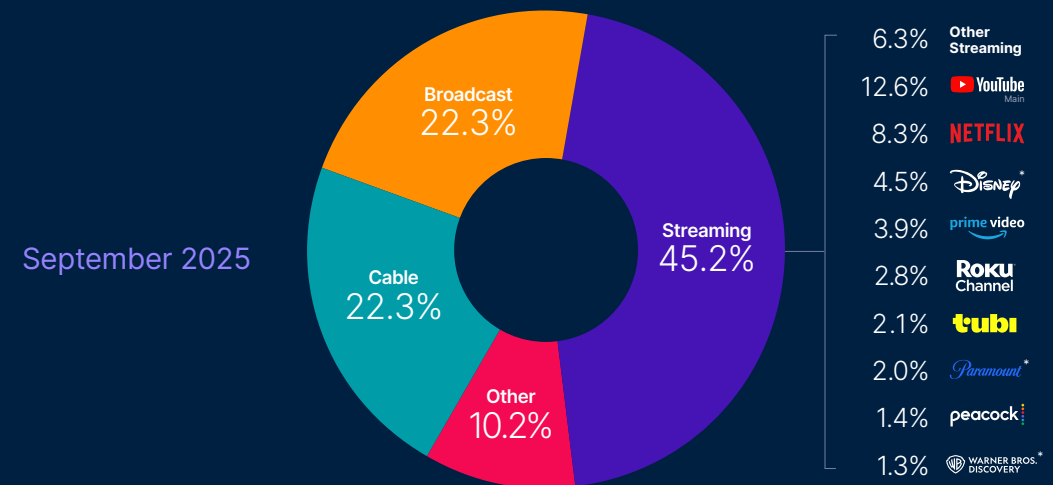
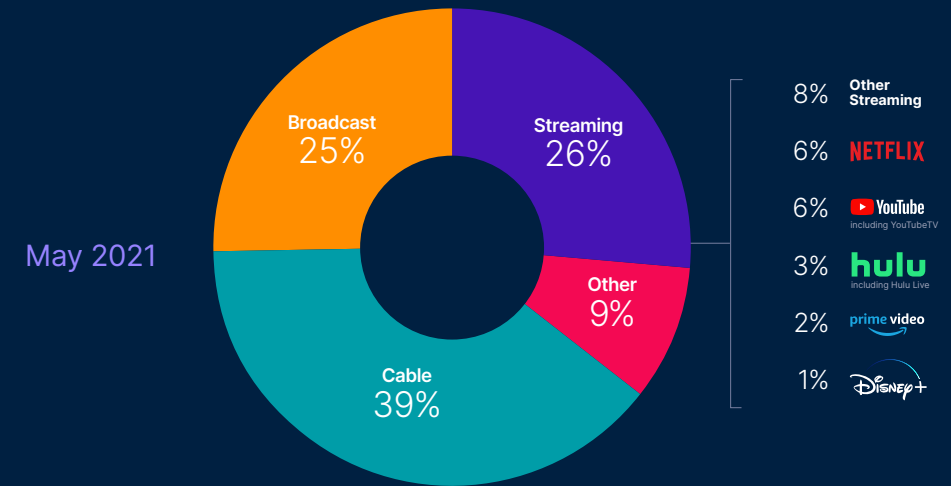
Expanding video distribution is complicating content discovery

The content discovery challenge is real.

New services, streaming options and over-the-top (OTT) channels continue to enter the market as audiences continue increasing their CTV usage. In the U.S., for example, there are nine different brands highlighted in the streaming portion of Nielsen's The Gauge, which measures TV viewing across broadcast, cable and streaming. When The Gauge launched in 2021, there were only five¹.

The growing realm of streaming providers and usage

Total usage; P2+



* Disney includes viewing on Disney+, ESPN+ and Hulu SVOD. Paramount includes viewing on Paramount+ and Pluto. Warner/Discovery includes viewing on Discovery+ and Max.

Source: Nielsen's The Gauge

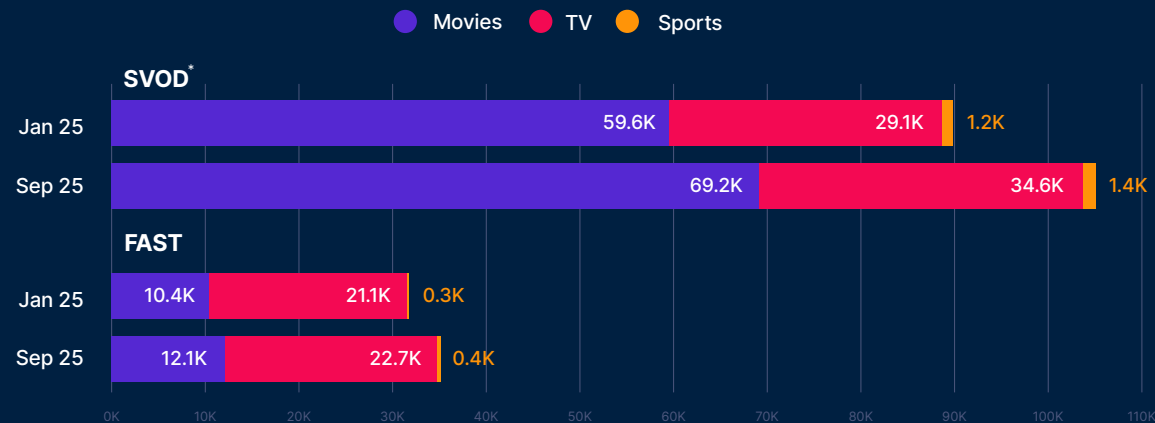
¹ At inception, streaming providers needed to account for 1% of TV usage to be listed individually in the Gauge.

The amount of FAST channels has increased by 21% in 2025

The amount of content is rising as well. In 2025 alone, the five global streaming services² that Gracenote tracks in its Data Hub have grown their catalogs by a collective 17%³. Meanwhile, free ad-supported streaming television (FAST) channels have increased their programming by 11%.

The ever-expanding streaming landscape

Content growth in 2025 across SVOD and FAST channels



*Amazon Prime Video, Apple TV+, Disney+, Netflix and Paramount+.

Note: The numbers reflect the total number of each unique TV show, movie and sports-related programs (individual TV episodes are not included).

Source: Gracenote Global Video Data

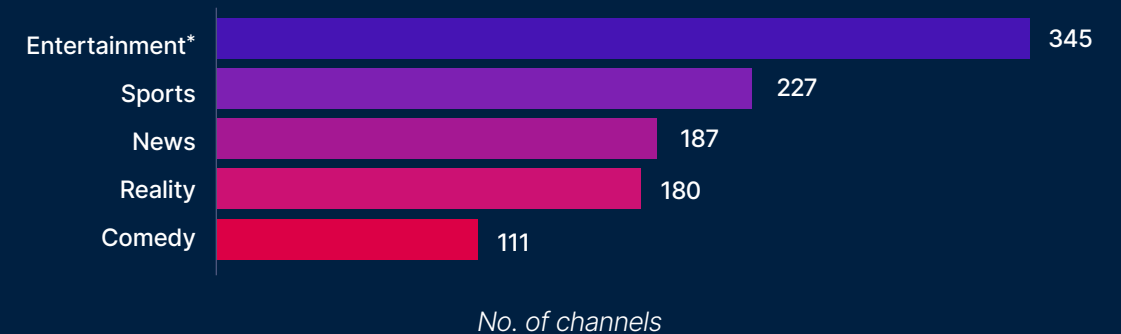
² Amazon Prime Video, Apple TV+, Disney+, Netflix and Paramount+ are U.S. based and have scaled to distribute video globally and are tracked in at least nine countries within Gracenote's video database.

³ As of Oct. 1, 2025

⁴ At the unique title level (i.e., excluding individual TV episodes)

Importantly, the different streaming options aren't simply repackaging the same content. FAST channels, for example, offer a greater percentage of TV shows than movies. SVOD services, on the other hand, dedicate more of their catalogs to movies⁴.

Top five genres across FAST channels



*Gracenote defines the entertainment genre as TV programs that are presented in a non-story-based format that are usually filmed live in a studio. These programs are designed to provide amusement, information and general entertainment.

Source: Gracenote Global Video Data; September 2025

92% of streaming viewers subscribe to streaming services to watch movies

- 2025 Gracenote streaming consumer survey

Additionally, the real-time nature of FAST programming has fueled a notable rise in sports and news channels, which are now the second- and fourth-most prevalent among those tracked by Gracenote, collectively accounting for 21% of all channels.

OTT channels amplify distribution fragmentation

Today's fragmented TV landscape is particularly evident with sports rights. To watch every game in a single NFL season, for example, viewers need:

A subscription to the NFL Sunday Ticket on YouTube TV for out-of-market games on Sundays.



Access to ABC, NBC, FOX and CBS for nationally televised and local market games.



Access to ESPN for Monday night games.



A subscription to Amazon Prime Video for Thursday night games and three special games (Black Friday, Christmas game, Wild Card exclusive).

A subscription to Netflix for Christmas games.



Access to the NFL Network for international games.



A subscription to Peacock to watch the Dec. 27, 2025, game.

In addition, many leagues sell the rights to individual games at the market level, which further congests overall video distribution and can present unique challenges for audiences looking for specific sports events.

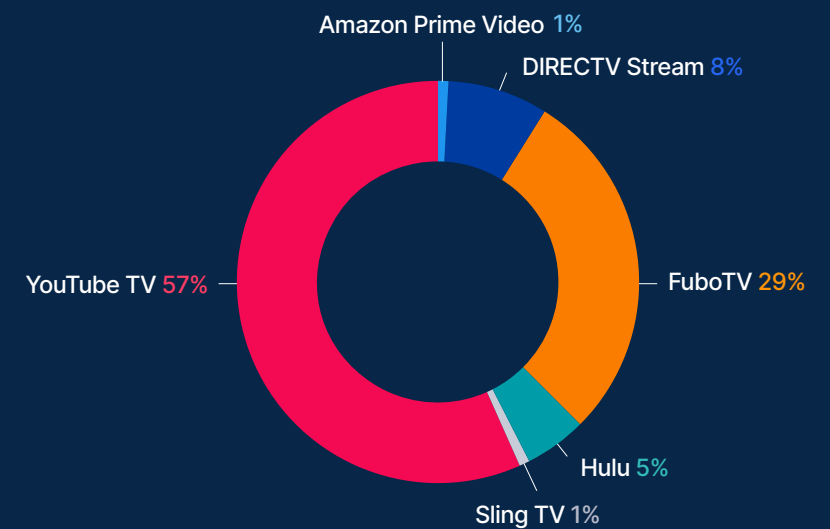
The Sept. 21, 2025, MLB matchup between the Los Angeles Dodgers and San Francisco Giants is a good example:

- 53 individual channels carried the game across traditional linear TV (including HD channels).
- MLB TV carried the game from a streaming subscription perspective.
- At the local level, streaming distribution was split across Amazon Prime Video and five different vMVPDs⁵: DIRECTV Stream, FuboTV, Hulu, Sling TV and YouTube TV.

With this degree of fragmentation, it's easy to see why audiences are struggling to find what they're looking for.

Local streaming distribution

San Francisco Giants at Los Angeles Dodgers, Sept. 21, 2025



Read as: YouTube TV accounted for 57% of the local streaming distribution for the Sept. 21, 2025, MLB game between the Los Angeles Dodgers and San Francisco Giants.

⁵ Virtual multichannel video programming distributors (vMVPDs) deliver live TV programming and on-demand content to viewers through an internet connection (examples include SlingTV, FuboTV and DirecTV Stream).

Lost without a map

Without any overarching structure, the expanding CTV landscape puts audiences in control of their TV viewing destinies. But at the same time, the lack of structure has made it harder for many people to find what they're looking for.

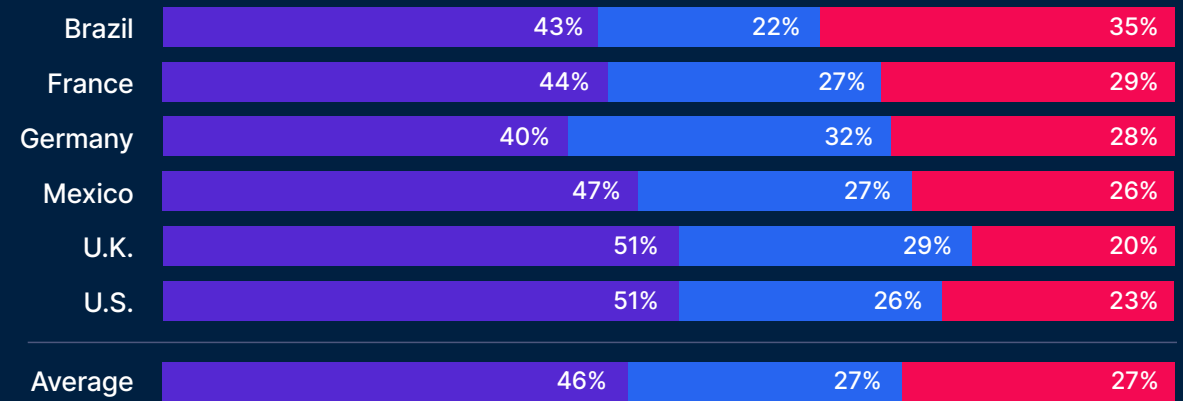
According to data from Gracenote's recent 2025 streaming consumer survey, nearly half of the respondents say the glut of services has made it harder to find the content they want to watch. The percentages are higher in the U.S. and the U.K. Relatedly, the U.S. has the greatest percentage of people who pay for six or more services, and the U.K. has the lowest percentage of people who pay for three or fewer. And somewhat surprisingly, younger viewers find the growing abundance of services more challenging to navigate than older viewers.

Streaming service overload

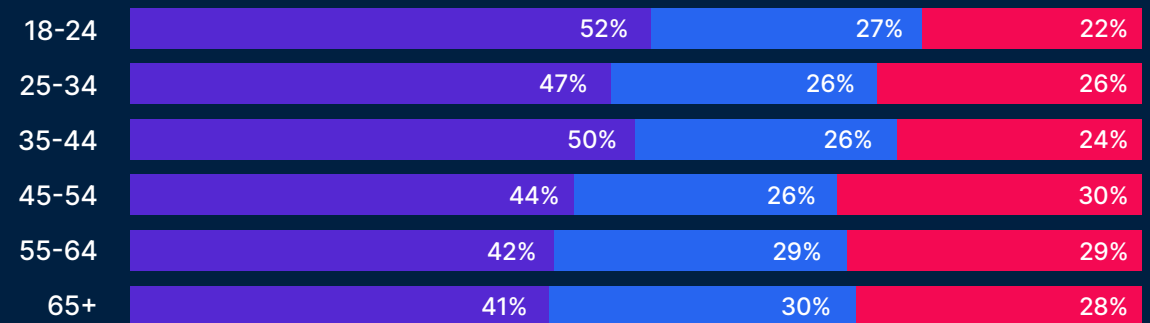
Too many services makes it difficult to find content

● Strongly / somewhat agree ● Neither agree nor disagree ● Somewhat / strongly disagree

Country view



Audience view



Read as: 43% of streaming consumers in Brazil strongly / somewhat agree that it's getting harder to find the content they want to watch because there are too many services available.

Source: Gracenote 2025 streaming consumer survey

The takeaway

There is no digital scaffolding that links video distribution across traditional TV, vMVPDs, FAST channels, subscription streaming services and OTT channels. Untethered, the splintering distribution of content will grow as a pain point for audiences, including many who actually know what they want to watch but still can't find it. Others will simply abandon the search altogether.

66% of streaming viewers want a service to tell them where to find a specific program, including sports, even if it's on a different service

- 2025 Gracenote streaming consumer survey

As publishers form strategies to attract and maintain viewers, they should focus their value propositions on all-encompassing content experiences, even if that means helping viewers find something that another publisher offers.



The effects of video fragmentation

Amid the fragmentation of both content and content source, audiences face two primary challenges:

- They often don't know what they want to watch, and the abundance of services and content is overwhelming, which makes it harder to find something.
- They often know what they want to watch, but they don't know how to find it. This is particularly relevant for sports content.

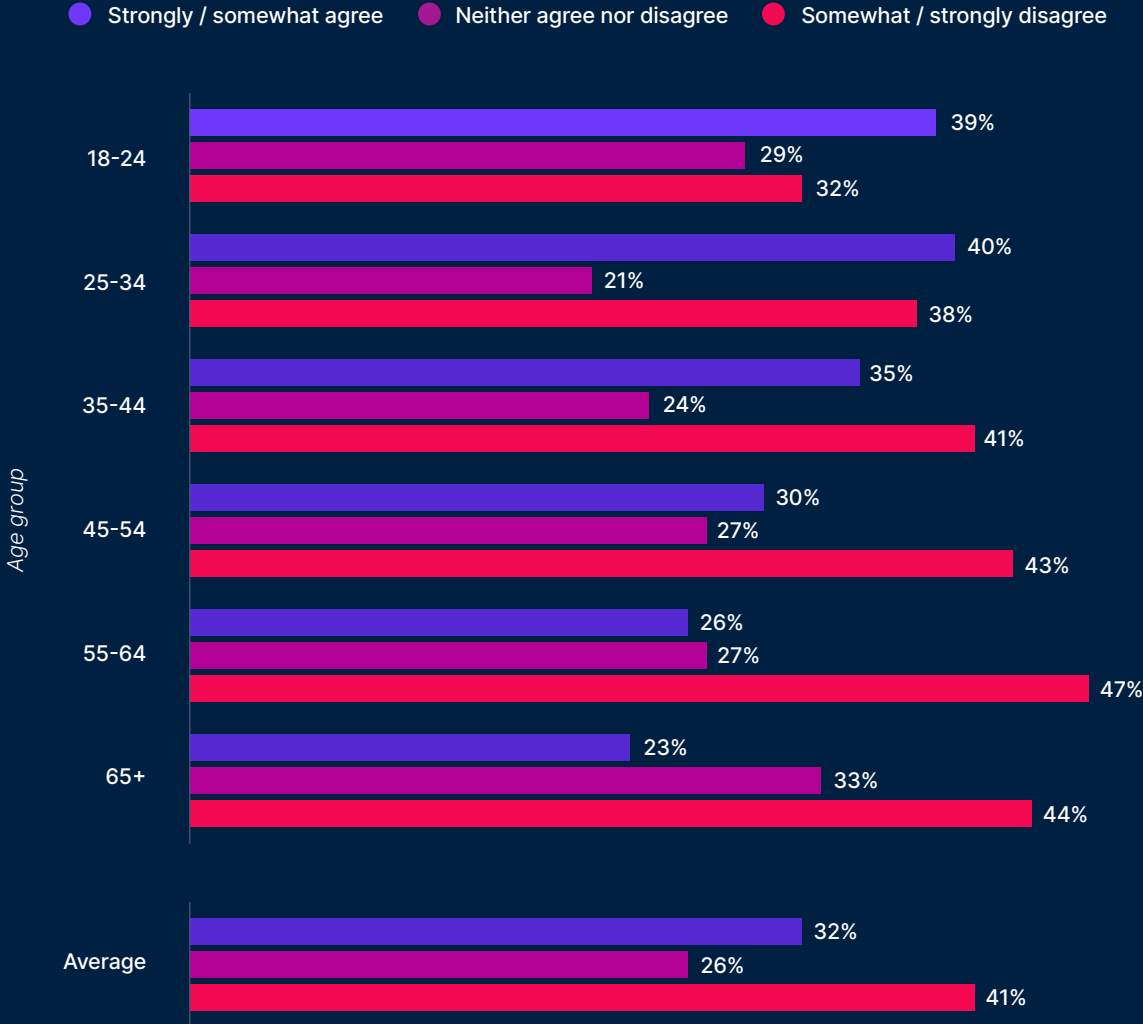
More than 45% of streaming viewers say that the saturation of streaming services and content is overwhelming

- 2025 Gracenote streaming consumer survey

At an even higher level, many say the overabundance of choice is making the overall TV experience less enjoyable. Among people 18-34, this sentiment is even more pronounced.

Viewership vulnerability

For many, fragmentation and the abundance of choice is negatively affecting the TV experience



Read as: 39% of streaming viewers 18-24 strongly or somewhat agree that the abundance of streaming services and content is having a negative impact on their overall TV enjoyment.
Source: Gracenote 2025 streaming consumer survey

Time searching is time not watching

The time that audiences spend searching for something to watch has a direct correlation with their enjoyment. The longer it takes to find something, the less enjoyable the experience becomes.

Streaming viewers now spend an average of 14 minutes searching for something to watch

- 2025 Gracenote streaming consumer survey

Through this lens, streaming consumers in France are enjoying their experience much less than viewers elsewhere. That's because viewers there say it takes an average of 26 minutes to find something to watch—almost double the average of 14 minutes. In a similar survey, conducted in mid-2023 among U.S. streaming consumers, the average was 10.5 minutes.

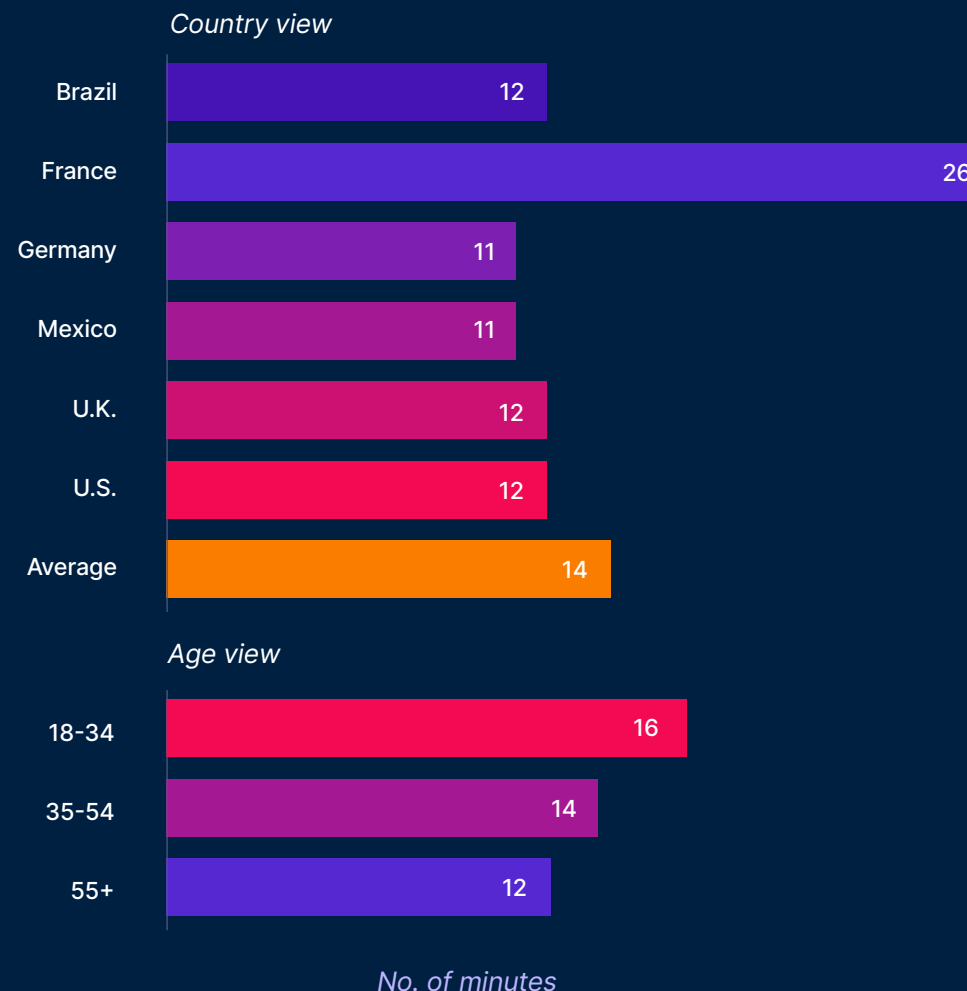


Streaming consumers ages 18-34 spend an average of more than 16 minutes looking for something to watch

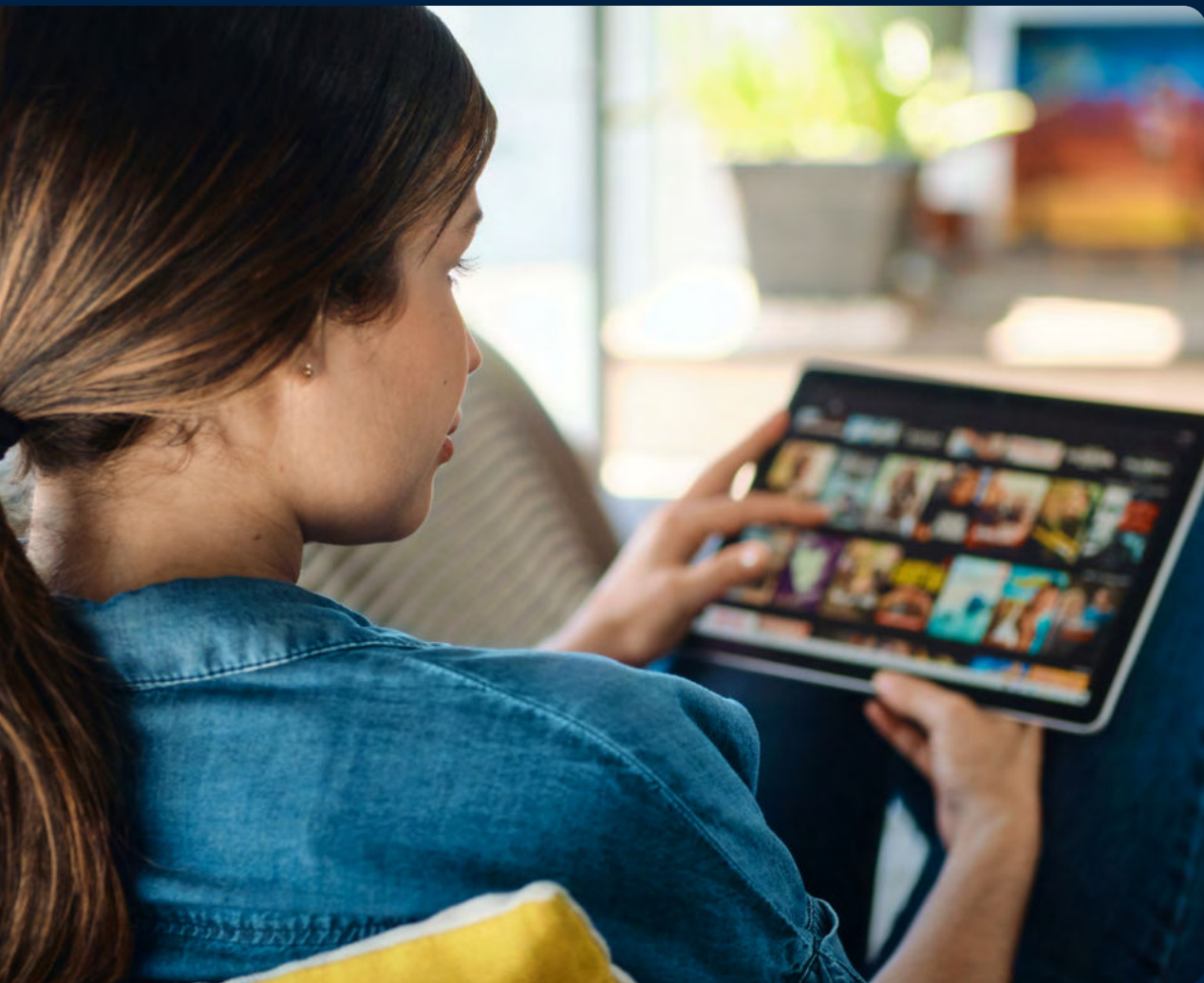
- 2025 Gracenote streaming consumer survey

Searching, not watching

How long do you browse before finding something to watch?



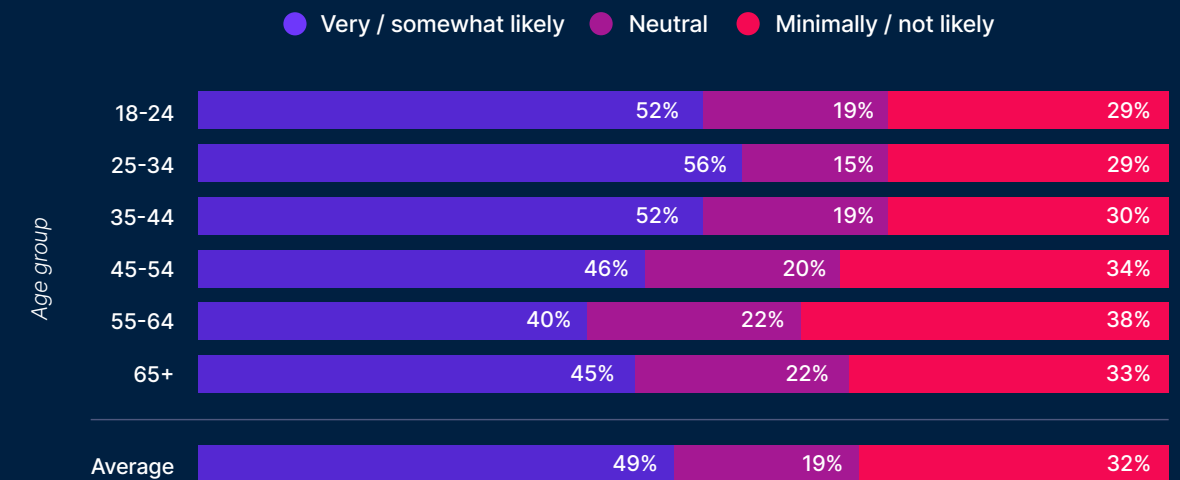
Read as: Streaming viewers in Brazil say they browse for an average of 12 minutes before finding something to watch. Source: Gracenote 2025 streaming consumer survey



For publishers and platforms, now is the time to develop strategies that ensure that viewers who don't know what they want to watch aren't left unfulfilled. That's because nearly 50% say they would consider cancelling a service because they can't find something to watch. Among younger viewers, the risk is even higher.

Cancel culture hits video streaming

Likelihood to cancel a service because viewers can't find something to watch



Read as: 52% of streaming viewers 18-24 say it's very or somewhat likely that they would cancel a streaming subscription because they can't find something to watch.

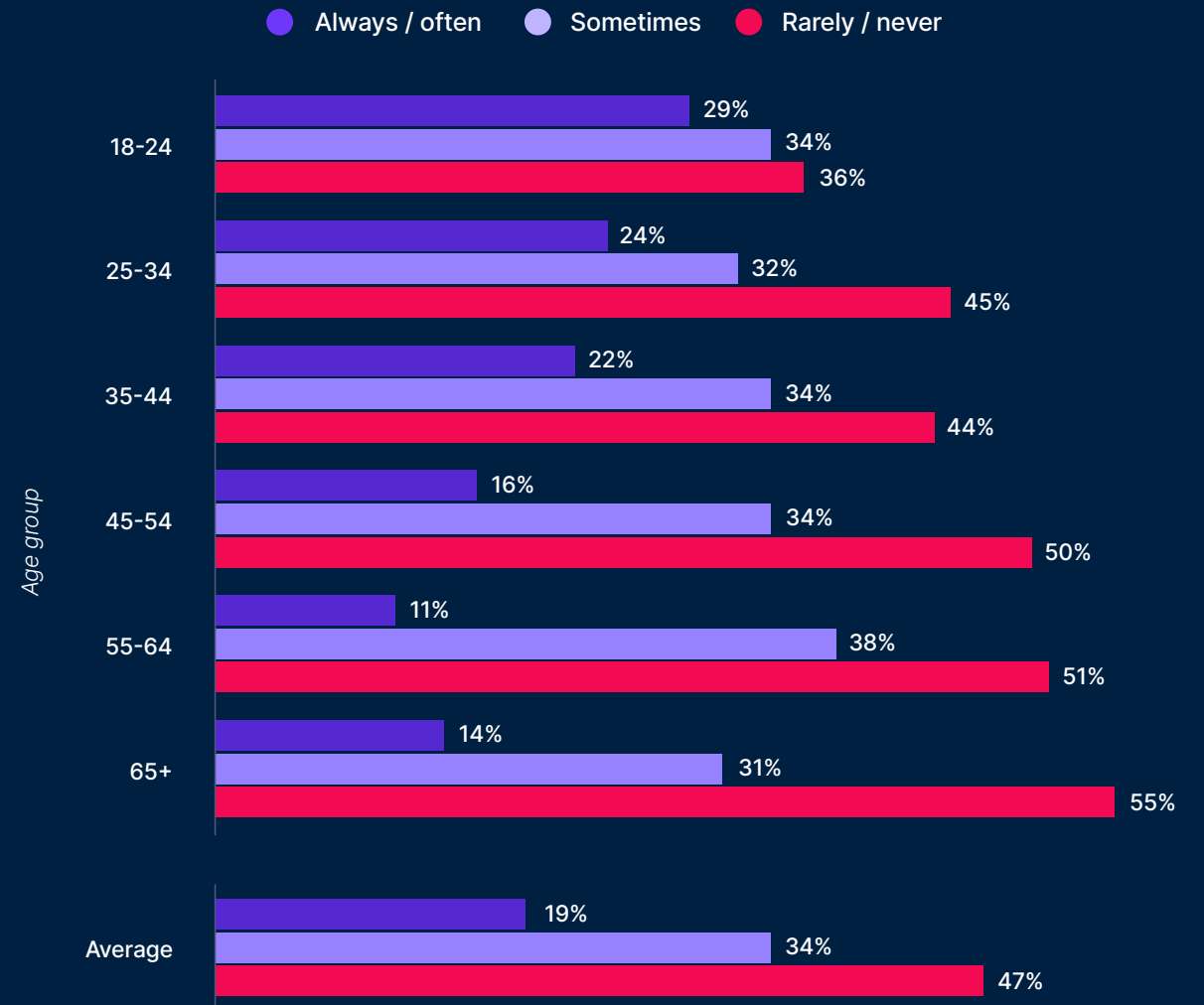
Source: Gracenote 2025 streaming consumer survey

The need to fulfill content discovery journeys

The risk of cancellation comes into even greater focus when we consider how often people don't know what they want to watch when they turn on their TVs. This is where it becomes critical for platforms and services to deliver meaningful content discovery journeys and recommendations. Across age groups, viewers 18-24 are the most likely to abandon their search and do something else entirely, with nearly one-third saying they frequently abandon their searches and do something else entirely.

Abandoning the search for content

Opting to do something else when viewers can't find something to watch



Read as: 29% of streaming viewers 18-24 say they always / often abandon their search to find something to watch and do something else.
Source: Gracenote 2025 streaming consumer survey

The takeaway

Not every viewer knows what they want to watch, and the lack of connectivity across all content sources means more time browsing and less time watching. In some cases, that means audiences find something from another source; in others, it means they abandon the search altogether.

66% of streaming viewers say they would prefer a single guide or menu that provides information about all available content across all content sources

The wide dispersal of content sources presents a notable opportunity for publishers that think outside their individual silos and use data to develop full-fledged content discovery experiences that minimize search frustration and maximize personalized viewing engagement.

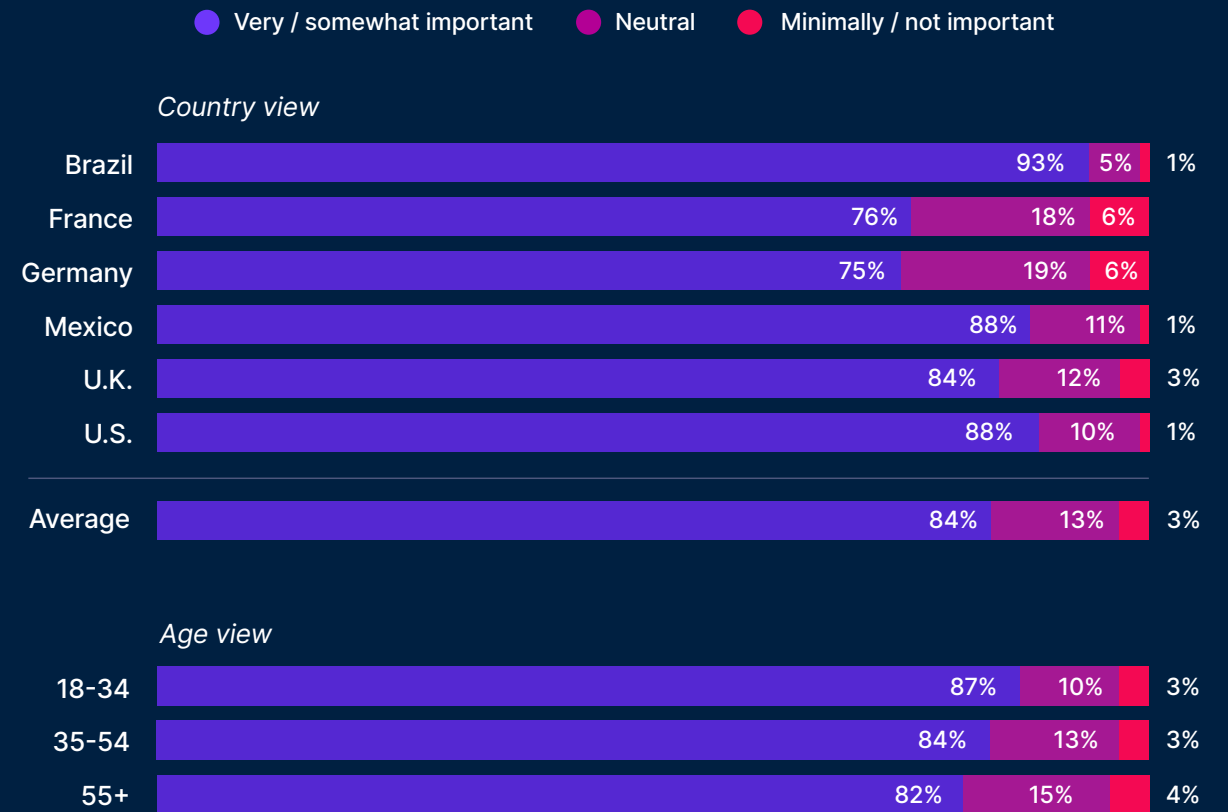


Viewers want more from their streaming experiences

In addition to wanting personalized content, audiences increasingly value the experiences that their streaming services provide, including aspects like layout, image relevance, the accuracy of program descriptions and overall presentation.

In fact, 84% of streaming users place a high value of importance on the overall user experience. In Brazil, the importance is nearly 10 percentage points higher.

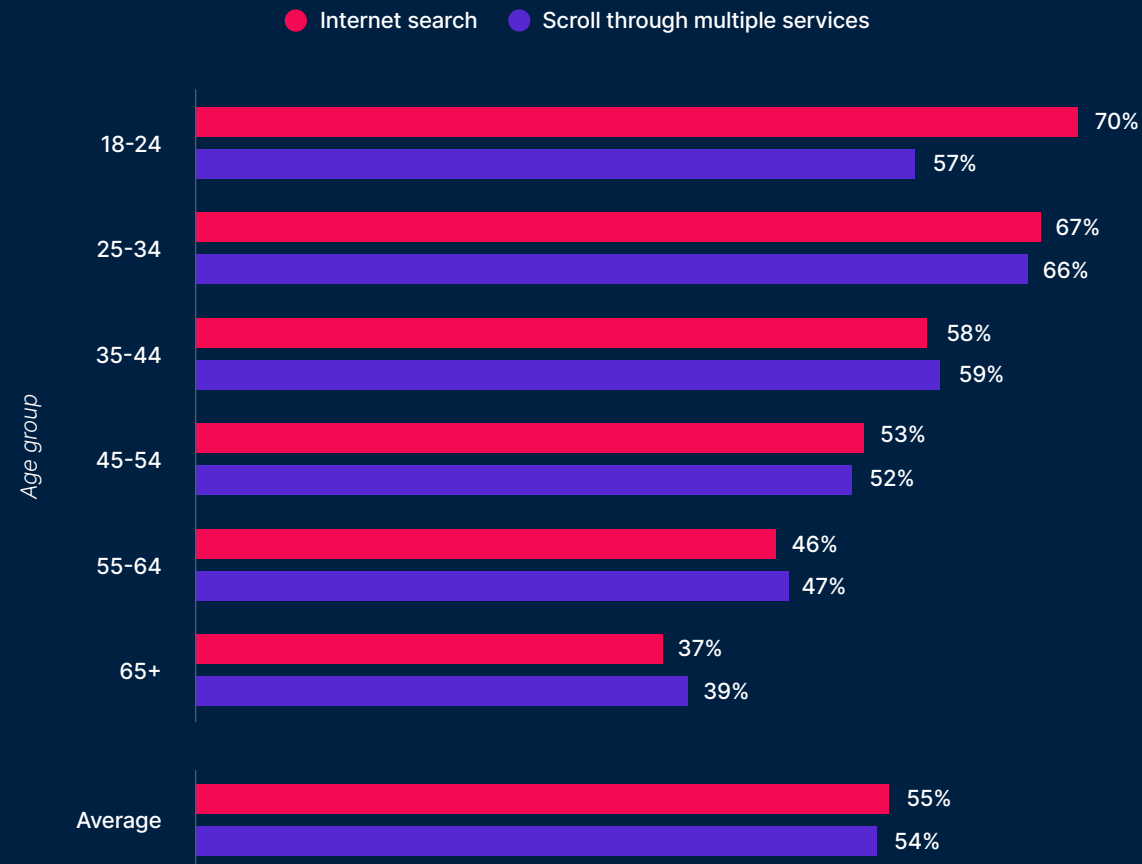
The importance of user experience



Read as: 93% of streaming viewers in Brazil believe a service's user experience is very / somewhat important.
Source: Gracenote 2025 streaming consumer survey

Search and discovery options are critical aspects of a service's user experience. Streaming consumers, however, view the internet as a slightly better resource for finding content when they're looking for something to watch.

Ways to find something to watch

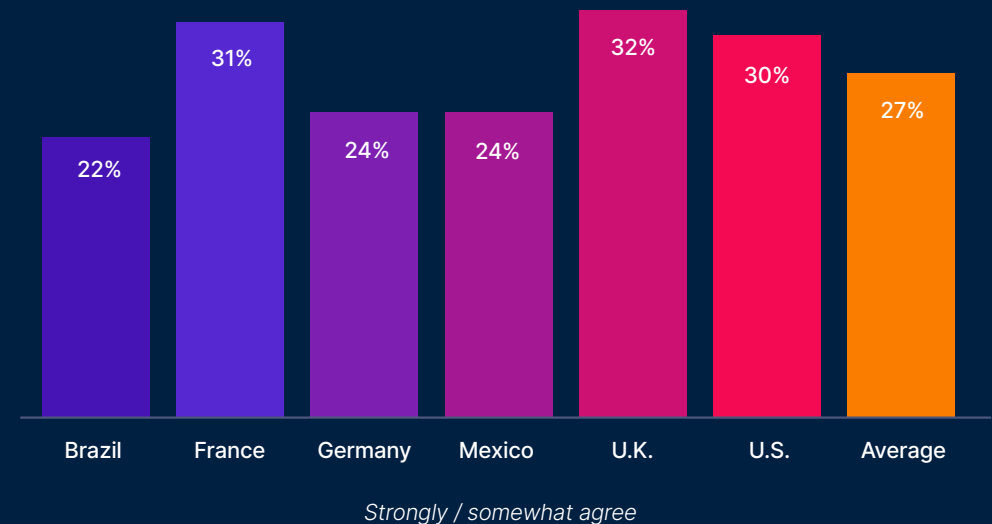


Read as: 55% of streaming consumers always / often search the internet when they're looking for something to watch.
Source: Gracenote 2025 streaming consumer survey

Additionally, streaming audiences don't always get the help they need from recommendation engines. In fact, more than one-fourth of streaming consumers don't believe menu recommendations are a useful resource for finding the content they're looking for. Percentages are higher in France, the U.K. and the U.S.

When looking for something to watch, only 28% of streaming viewers decide to watch something based on a service recommendation

Recommendation dissatisfaction



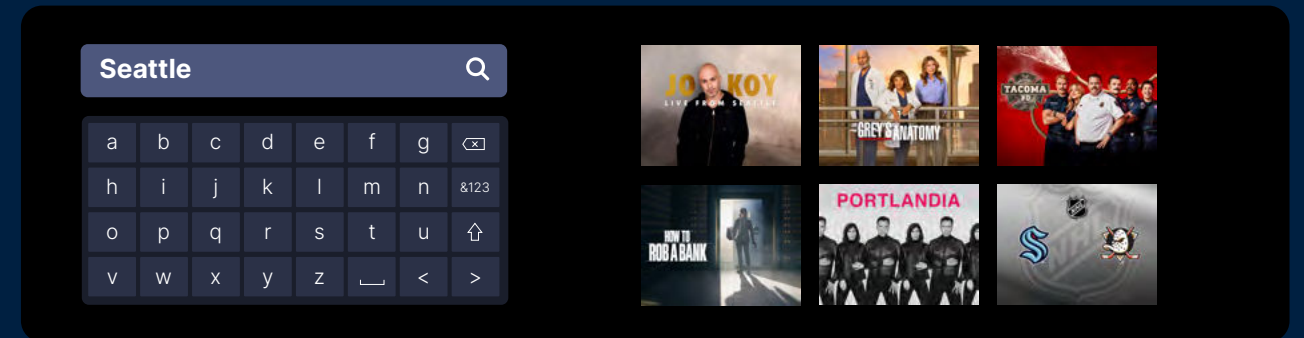
Read as: 31% of streaming consumers in France strongly / somewhat agree that recommendations are not a useful resource for finding content they want to watch.
Source: Gracenote 2025 streaming consumer survey

Delivering tomorrow's entertainment experience today

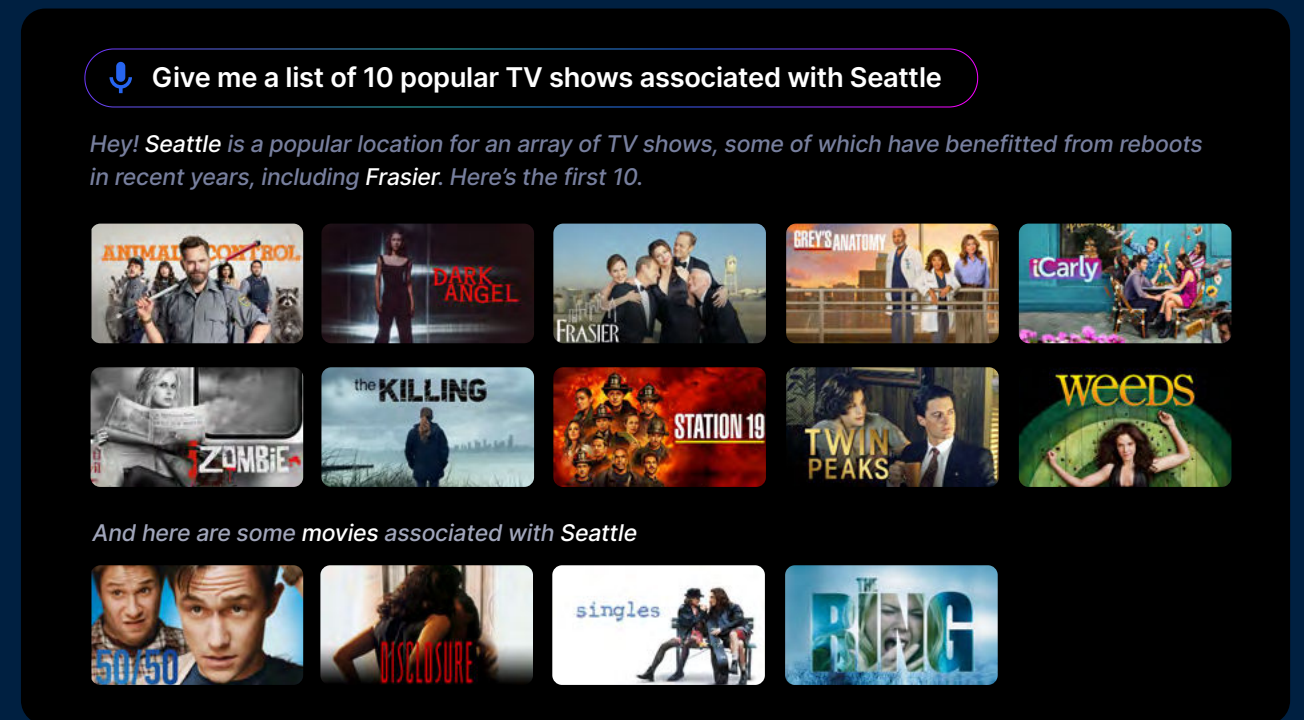
As fragmentation escalates, user experience is top of mind for many platforms and services. The use of generative AI⁶ plays a role here, especially as publishers increase their use of large language models (LLMs⁷) to up-level the experiences they offer viewers.

The use of LLMs for content discovery will be transformative for audiences. Not only will they allow platforms and services to break from the limitations of traditional search infrastructures, they will enable sophisticated queries from consumers that will drive more topical and relevant responses. They can also reduce the intensive engineering work involved with harmonizing and normalizing entertainment data from disparate sources.

Traditional search experiences



LLM-driven search experiences



⁶ The ability for AI to generate text, images and videos in response to text prompts.

⁷ LLMs are a type of generative AI that create content based on learned patterns.

Here, linking an LLM to industry-standard entertainment data to reduce hallucinations⁸ and ground the results with real-time information will ensure that search and discovery journeys will deliver accurate, relevant and up-to-date query responses. Additionally, next-gen experiences will help viewers easily unearth content they might not otherwise know about.

Here are three use cases where next-gen experiences will power more intuitive and comprehensive results.

Sample queries

Search

Give me a list of 10 popular TV shows associated with Seattle

What's a great comfort movie?

What's the name of the comic book movie with the sarcastic super hero?

Discovery

The World Cup is next week. What are the 10 best soccer movies ranked by popularity?

Recommend the 10 most popular movies to this user based on the following watch history [...]

Recommend the top 10 TV shows by popularity for the following apps available to the user [...]

Availability

The Dodgers are playing the Mets tonight. Where can I watch the game?

I live in Beverly Hills. What's good on TV right now?

Where can I watch Friends?

⁸ Inaccurate and completely false LLM responses are referred to as hallucinations.

The takeaway

As we increase our use of AI in our daily lives, the expectations we have for technology will steadily rise. This presents a significant opportunity for publishers and content providers looking to deliver experiences that span beyond the boundaries of traditional search and recommendation infrastructures.

75% of streaming viewers are interested in recommendations based on selections they choose, such as the year a movie was released, its mood and the country it was produced in

LLMs offer three key advantages over current search technologies. They provide:

- 1. Vastly improved semantic search capabilities.** With an LLM, a search engine can respond to sophisticated user requests, such as “Help me find that cop comedy with the deadpan sergeant.”
- 2. An exhaustive and harmonized content catalogue.** LLMs have been trained on the broadest expanse of entertainment metadata and related information, which has been harmonized into a comprehensive whole. This overcomes the cumbersome process of harmonizing content from an array of sources.
- 3. Powerful ranking and sorting.** LLMs contain a massive array of metrics, including critical acclaim, awards, audience engagement, industry hype, box office receipts and prominent actors. This allows search and discovery engines to order query results according to any, or all, of these metrics. For example, a search engine could order the top horror movies from 1987 by box office revenue.





In closing

CTV and all that it offers has become the future of TV. That future, however, is no longer contained in a single, easy-to-navigate environment. The breadth of choice that the TV content ecosystem now offers is a bounty of choice for media-hungry viewers, but there are no road maps for them to follow when they're looking for something to watch.

Importantly, the explosion of content and content sources over the past decade has not led to an increase in total TV usage. While time spent with CTV has dramatically increased, that engagement is now splintering across myriad channels, services and platforms. Just as it always has been, viewer engagement is the lifeblood of any publisher, which places a heightened level of importance on the user experience.

With the time it takes to find content on the rise and viewers' inclinations to cancel or abandon when they don't find what they're looking for, publishers have a distinct opportunity to make their value propositions the ones audiences rely on.



Data sources

Gracenote's 2025 streaming consumer survey

This report leverages survey responses from streaming TV consumers in Brazil, France, Germany, Mexico, the U.S. and the U.K. Respondents needed to stream video either through a connected device or a smart TV. The survey was conducted online and was fielded July 28-Aug. 1, 2025. The report data reflects the responses from a total of 3,000 respondents (500 per country).

Gracenote Global Video Data

Gracenote Video Data provides comprehensive TV show and movie metadata covering titles, descriptions, genres and more across 80+ countries and territories in 70+ languages. Gracenote provides detailed TV listings data for 75,000+ linear channels, nearly 2,000 FAST channels, along with availability for 260+ streaming catalogs.

The Gauge™

The Gauge is Nielsen's monthly snapshot of total broadcast, cable and streaming consumption that occurs through a television screen, providing the industry with a holistic look at what audiences are watching. The data for The Gauge is derived from two separately weighted panels and combined to create the graphic. Nielsen's streaming data is derived from a subset of Streaming Meter-enabled TV households within the National TV panel. The linear TV sources (broadcast and cable), as well as total usage, are based on viewing from Nielsen's overall TV panel.