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State of play



Amid fragmentation frustrations, UX is the future of streaming

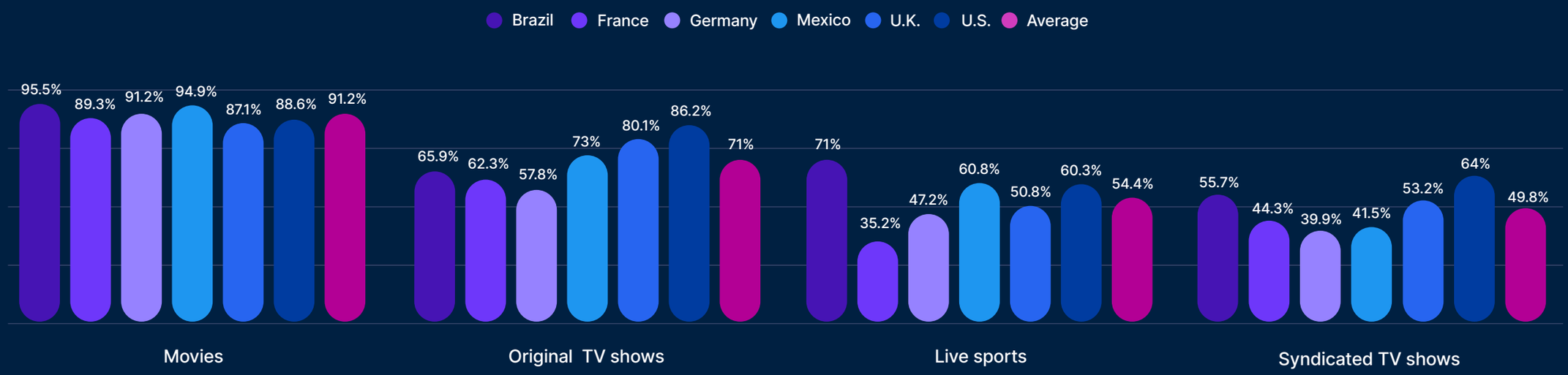
Push play

In a very short time, the streaming landscape has evolved from being a destination for on-demand hit shows and movies to one that is far more holistic. With the steady migration of sports to streaming services and the robust growth of news programming across free ad-supported streaming TV (FAST), our expanding connected TV (CTV) options have become far more comprehensive — and scheduled — than ever.

As a result, today's streaming landscape looks increasingly less like the one that debuted a little more than a decade ago and more like the experience we shifted away from as our TVs became more connected.

Movies and TV shows remain foundational across streaming services, with just over 91% of streaming audiences saying they subscribe for movies and 71% saying they subscribe for original shows. But live sports, bolstered by massive investments by pure-play streamers, are now the third-strongest draw among audiences on average — even more so than syndicated favorites like *The Office* and *Seinfeld*.

Reasons people subscribe to streaming services



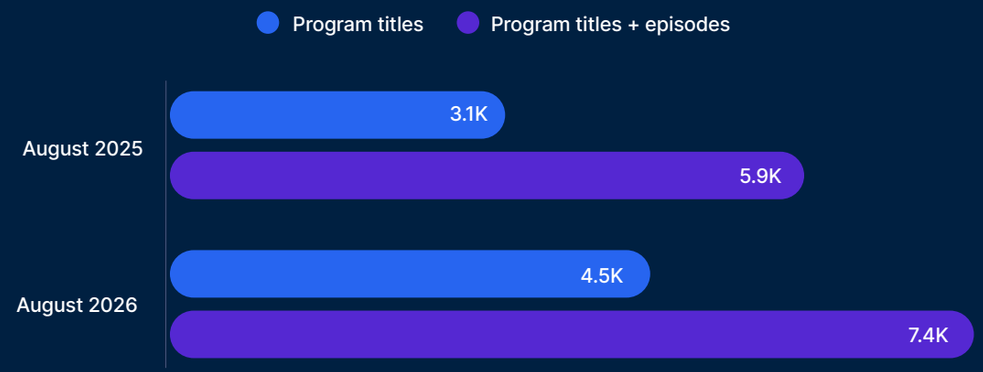
Read as: 95.5% streaming viewers in Brazil subscribe to at least one streaming service to watch movies.
Source: 2026 Gracenote streaming consumer survey.

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News is another key driver of scheduled viewing, which has helped its ascent across FAST channels over the past year. And viewership is following, especially for channels backed by big media brands. Adweek reported in August, for example, that CNN Headlines, the network's FAST channel, had grown its audience 192% over the previous year.

News is growing on FAST channels



Source: Gracenote Global Video Data, August 2026

As it becomes more comprehensive, the streaming landscape grows increasingly siloed and difficult to navigate. Now ubiquitous in mature, digital markets, streaming has evolved from being a complement to other options to the dominant option. Despite this dominance, however, negative sentiment about fragmentation is growing. Consumers still love their streaming experiences, but slightly less than they did a year ago.



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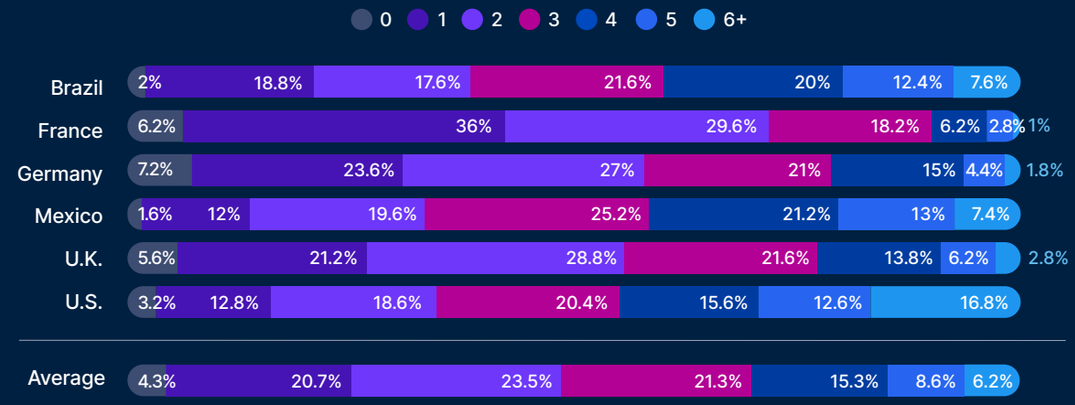
The state of streaming

There's no denying the appeal of streaming video, especially as it becomes more well rounded in its offerings. The transition from on-demand sidecar to comprehensive content ecosystem continues to drive cord cutting, further cementing streaming as a foundational component of our daily lives with media.

30% of streaming viewers pay for four of more streaming services

Now on the hook, consumers pay for more services than they did a year ago, and they spend more time streaming. Fewer people, on average, only pay for one subscription (20.7% vs. 24.5%), and more than 51% say they pay for three or more. And in the U.S., nearly 17% pay for six or more.

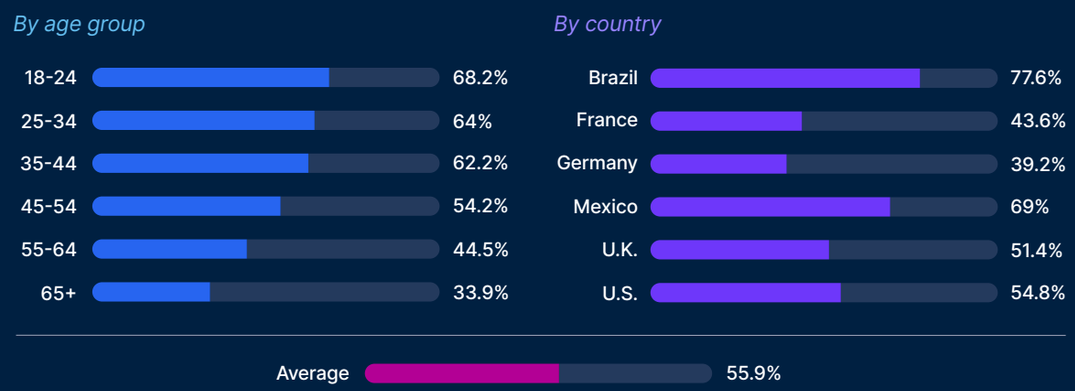
No. of paid streaming subscriptions



Read as: 18.8% of streaming users in Brazil pay for one streaming service.
Source: 2026 Gracenote streaming consumer survey.

People are spending more time streaming video

Increased time spent over the past year



Read as: 68.2% of streaming viewers ages 18-24 say they are streaming more video than they were a year ago.
Source: 2026 Gracenote streaming consumer survey.

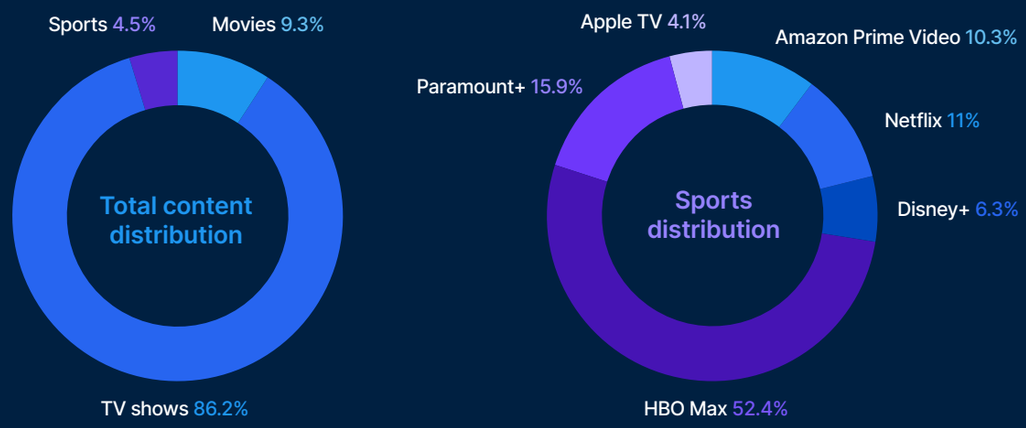
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Sports become a fixture across streaming services

While sports represents a relatively small portion of the content that subscription video on demand (SVOD) services distribute, sports programming has grown by 25% over the past year. As of August 2026, the six global SVOD services tracked by the Gracenote Data Hub distributed half as many sports programs as movies.

Video distribution across global SVOD services

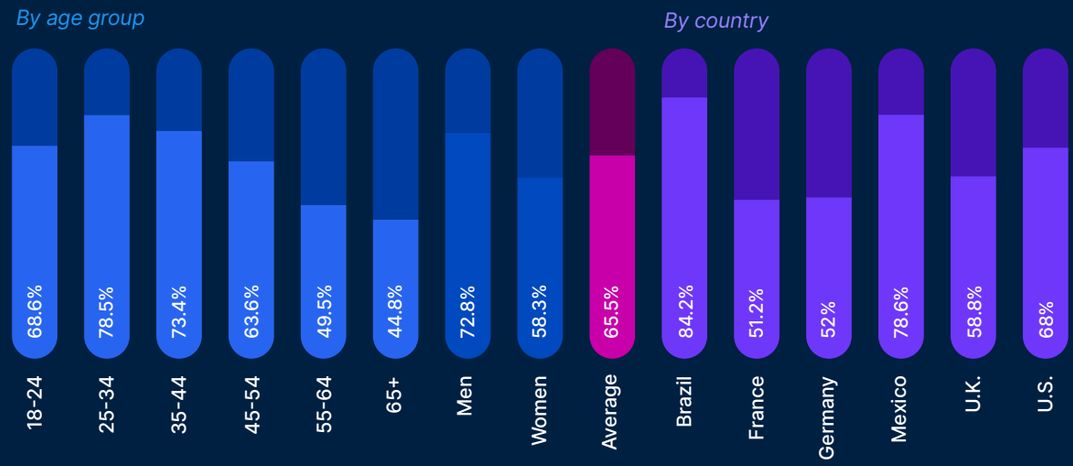


Source: Gracenote Global Video Data, August 2026

More than 65% of streaming viewers say it's likely that they would sign up for a service because of the live sports it offers

Given the significant investments in sports rights by streaming companies, an array of high-profile sporting events are now exclusive to subscription services, including WWE events, NBA and WNBA games, NASCAR races, NHL and MLB games, boxing bouts, and FIFA tournaments. In addition to the 54.4% of streaming viewers who already subscribe to a service to watch live sports, 65.5%, on average, say they'd likely pay for a service just for the live sports it offers, highlighting the importance of sports for well-rounded streaming experiences.

Likelihood to subscribe for live sports



Note: Percentages reflect the sum of responses for "very likely" and "somewhat likely."
Read as: 68.6% of streaming viewers ages 18-24 say they would be very/somewhat likely to subscribe to a streaming service for the live sports it offers.
Source: 2026 Gracenote streaming consumer survey.

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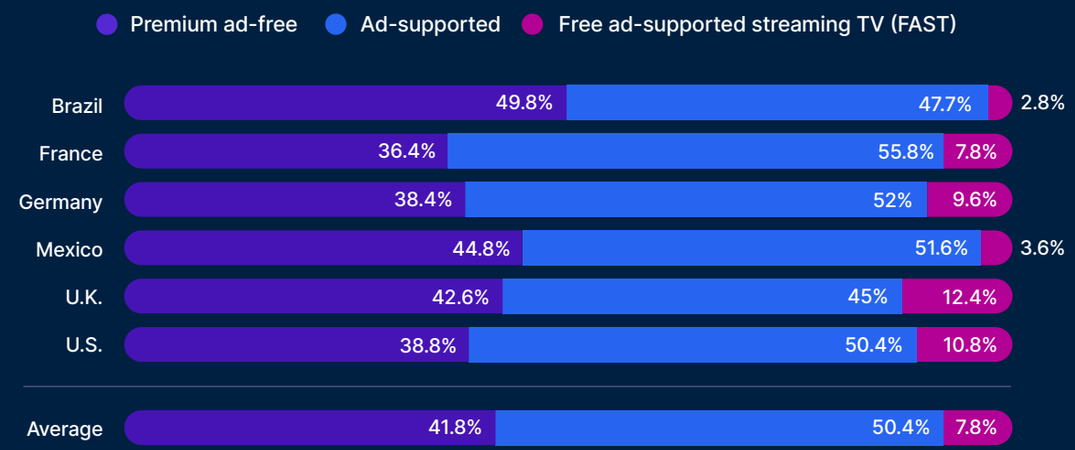
Ad-supported streaming completes the full circle

Contrary to the origins of streaming, when consumers were quick to pay for premium, ad-free services, today's viewers prefer ad-supported subscriptions. While some services, like Hulu, launched with ads, other players like Netflix, Disney+ and Amazon Prime Video have debuted ad tiers within just the past few years.

12.4% of streaming viewers in the U.K. prefer FAST platforms like Pluto TV and Tubi over other streaming options

With streaming price hikes now outpacing inflation, the preference for less-expensive ad-supported services isn't surprising, especially as few consumers carry just one subscription. The shift is also another indication that streaming is bringing us back to familiar territory. Brazil is the outlier here, where premium, ad-free services have a slight edge over ad-supported options. FAST services also continue gaining momentum with viewers, especially in the U.K. and the U.S.

Preferred streaming service option



Read as: 49.8% of streaming viewers in Brazil prefer premium, ad-free streaming services.
Source: 2026 Gracenote streaming consumer survey.

From a business perspective, ad-supported models are paying off. In North America, market research company Dataxis reports that over-the-top advertising revenue exceeded subscription revenue in the first two quarters of 2026, representing 51.1% and 50.5% of the total[1], respectively. And in Europe, Grand View Research projects that FAST revenue will grow at a compound annual growth rate of 15.6% through 2033, at which point revenue will eclipse $8.5 billion.

While advertisements bring streaming closer to the traditional TV experience, ad loads across the streaming landscape are generally lower, averaging about five minutes per hour, per Business Insider. Loads vary by each service, but they all fall below the 12- to 16-minute range on traditional TV.

[1] Streaming Quarterly - North America, Q1 2026 and Q2 2026, Dataxis

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The takeaway

The streaming ecosystem has evolved to offer more than just on-demand TV shows and movies. No longer an add-on or complement to traditional pay TV, the streaming landscape is now a comprehensive content ecosystem, and audiences are fully invested in all of it. The only real downside is that the growing expanse lacks any structure or organization to contain it.



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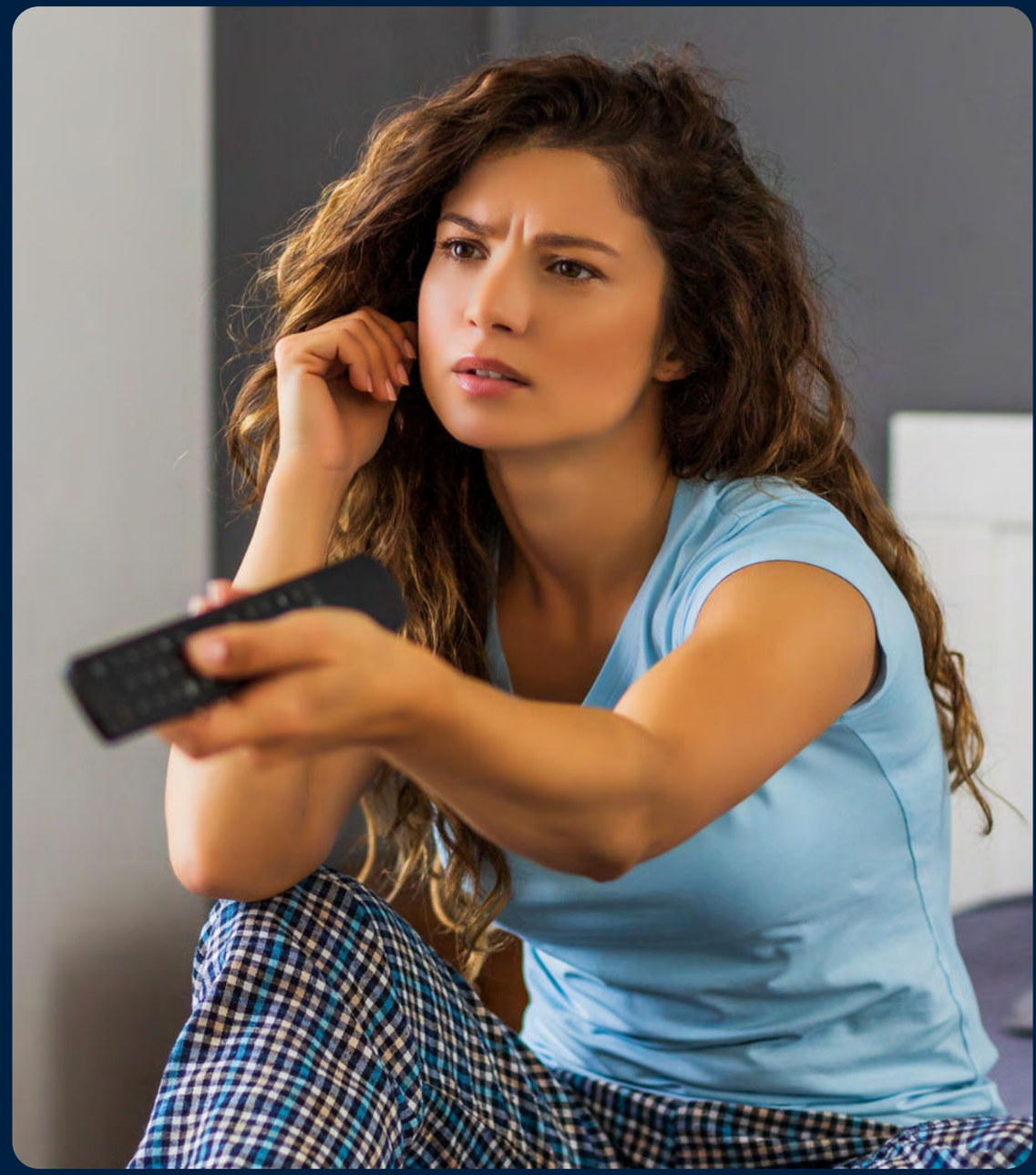
Expanding distribution magnifies content discovery challenges

Similar to tax rates, it's unlikely that streaming catalog volumes will ever decline. New content will always be in production, and video catalogs will continually grow. Despite the appeal of perpetually fresh content, today's sprawling distribution trends have significantly amplified content discovery challenges.

More than 27% of streaming viewers say they frequently try to watch a specific program but don't because they couldn't find it

Here, viewers are struggling in two ways:

1. They know what they want to watch but can't find it.
2. They don't know what they want to watch, and they can't find something of interest.



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Widening video distribution grows increasingly overwhelming for viewers

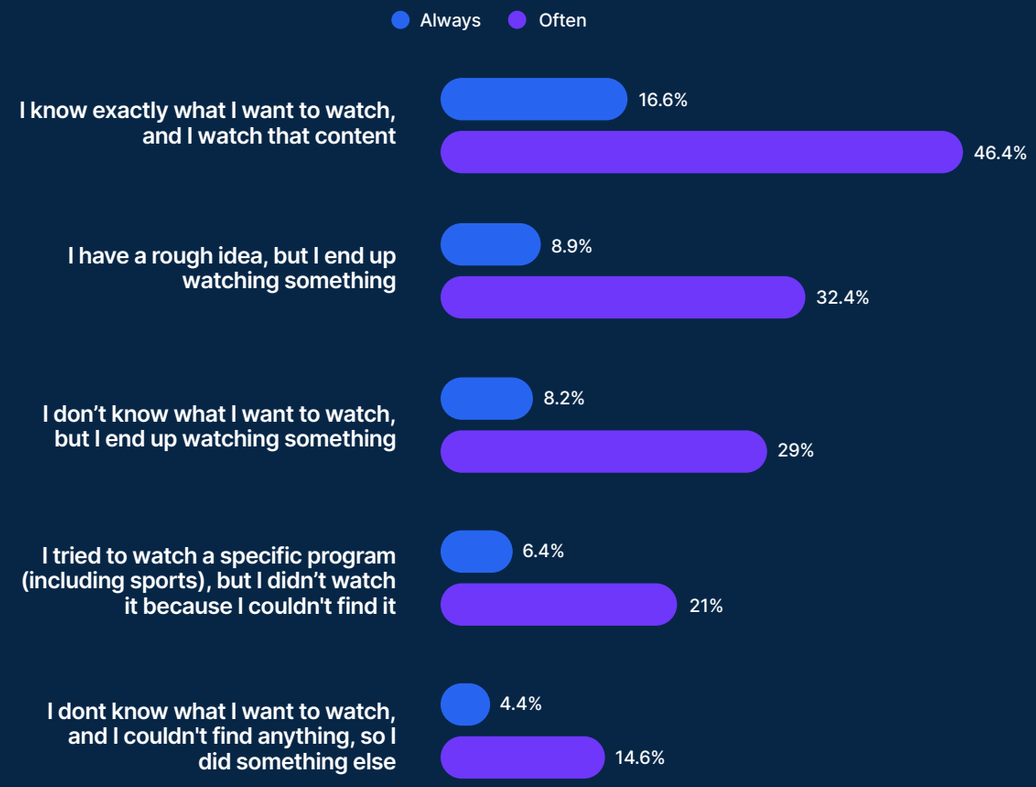
Despite the abundance of great programming, viewers usually don’t know what they want to watch when they turn on their TVs. As a result, they typically start a new content discovery journey each session, which can be daunting.

More than 51% of streaming viewers say the abundance of content and services is making it harder to find something to watch

On average, only 16.6% say they always know what they want to watch and then watch that content. Comparatively, approximately 38% say they frequently don’t know what to watch, but they end up watching something. Here, simple math highlights how the glut of choice is affecting video engagement. It also illuminates the opportunity publishers have to improve the experience, especially when it comes to the 27.3% who say they frequently try to watch something but don’t because they can’t find it — as well as for the 19% who often abandon their searches altogether.

How growing choice affects viewing outcomes

Averages across age groups and countries



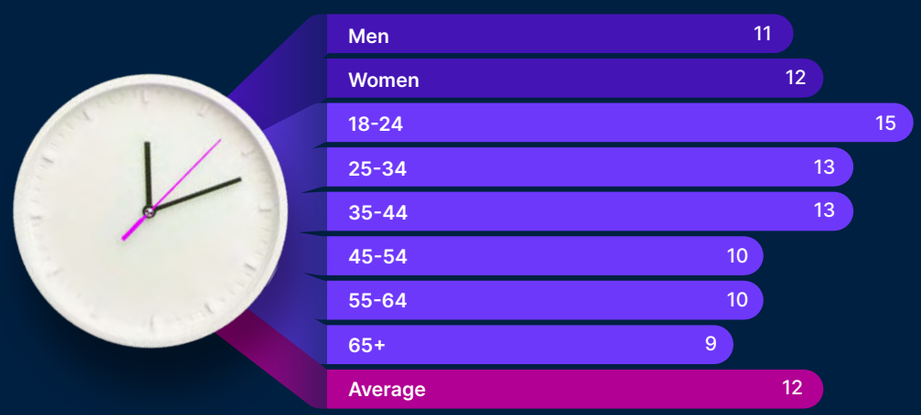
Note: Percentages reflect responses of “always” and “often” when asked “How often does the following happen?”
Read as: 16.6% of streaming viewers, on average, always know what they want to watch and watch that content.
Source: 2026 Gracenote streaming consumer survey.

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Through the lens of catalog size and streaming usage, connecting the 83.4% who don't always know what they want to watch should be fairly straightforward, especially as companies increasingly use customer data to create personalized experiences that foster long-term engagement and loyalty. Audiences, however, aren't finding what they're looking for, and content discovery challenges are mounting. On average, 47% of streaming viewers say they're spending more time searching for something to watch than they were a year ago, with the average search journey taking 12 minutes. Among people 18-24, it takes 15 minutes.

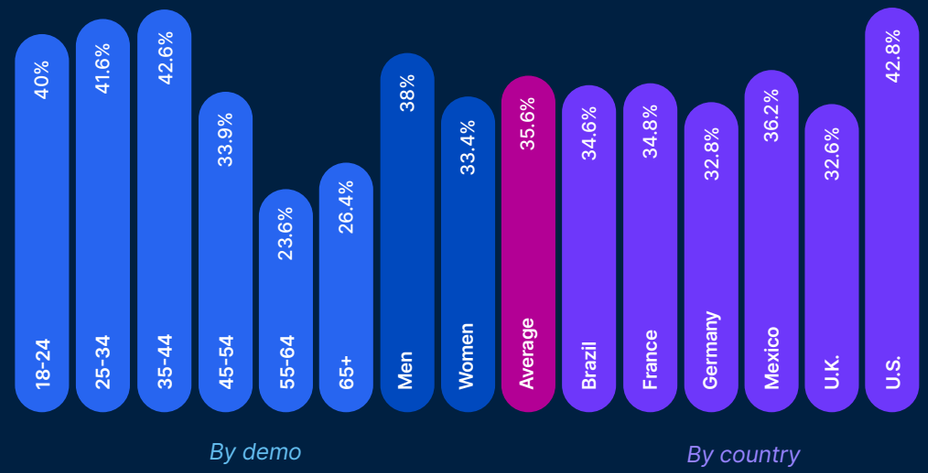
Minutes spent searching for something to watch



Read as: Men spend an average of 11 minutes looking for something to watch.
Source: 2026 Gracenote streaming consumer survey.

While the increased time spent searching represents an inconvenience for viewers, the cumulative effect of each pain point that today's distribution trends cause is much more problematic: 35.6% of streaming viewers say the glut of content and services is negatively affecting their enjoyment of TV, which is up from 32.2% a year ago. Among younger viewers and people in the U.S., the percentages are notably higher.

Streaming overload is having a negative impact on TV enjoyment



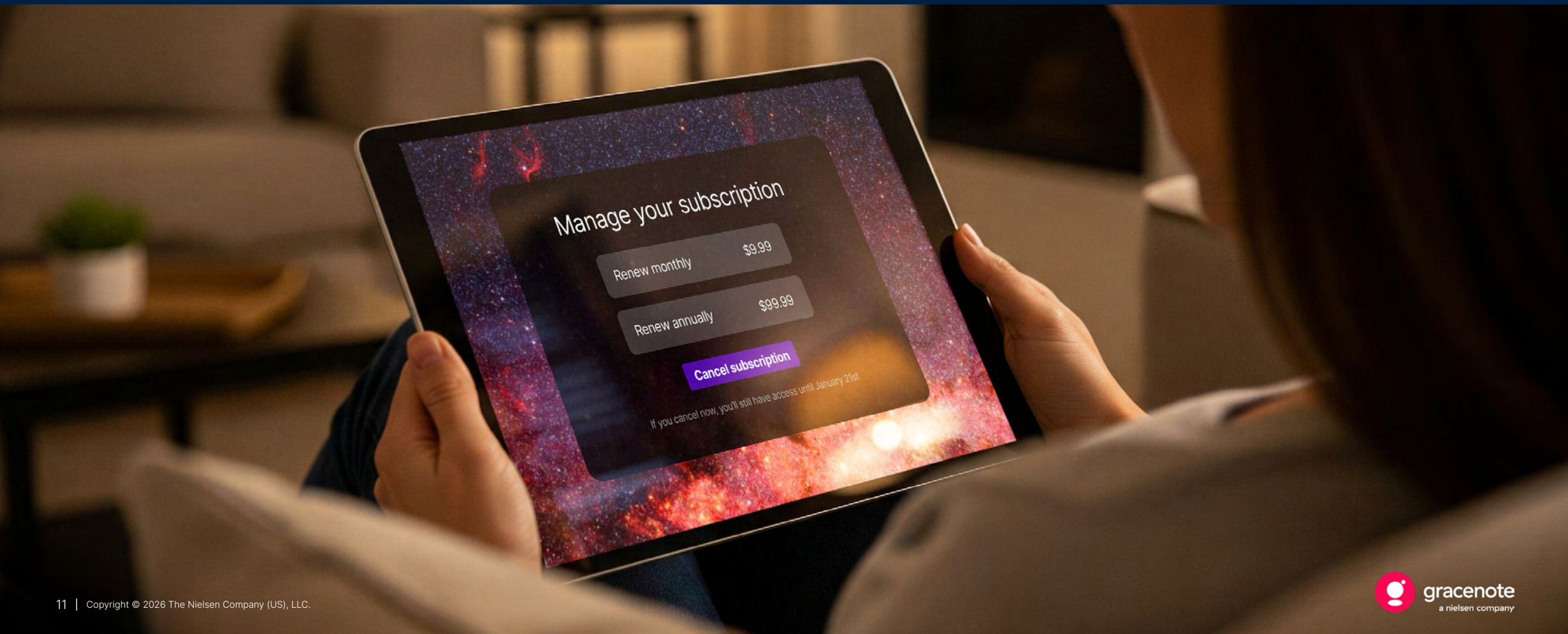
Note: Percentages reflect the sum of responses for "strongly agree" and "somewhat agree" that the abundance of content and services is having a negative impact on TV enjoyment.
Read as: 40% of streaming viewers ages 18-24 agree that the amount of streaming services and content available is having a negative impact on their TV enjoyment.
Source: 2026 Gracenote streaming consumer survey.

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The takeaway

Consumers have wholeheartedly adopted streaming as the dominant way they engage with their TVs, but individual services and apps aren't showcasing their long-term value amid growing fragmentation. Despite massive catalogs and ample program choice, 51.3% of streaming video consumers say they frequently or occasionally cancel a service after watching a specific program or event. And what's more, an average of 31% say they have not found a good source of recommendations for their personal tastes and preferences.



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Sports distribution amplifies fan frustrations

Challenges associated with finding sporting events are much different — and more exacerbated — than they are with finding general entertainment programs. Viewers, for example, can typically watch all of the episodes from a specific TV show with a single subscription. That's not the case with sports.

50% of sports fans would pay for an additional streaming service specifically for the live sports it offers

Fragmentation notwithstanding, sports content remains foundational for television. Its widespread appeal and ability to engage audiences in real time make it the most valuable programming there is. Among streaming viewers, nearly 55% say they subscribe to a service to watch live sports. Among men, the percentage exceeds 66%, and it's nearly 60% among people 25-44.

How to watch all New York Yankees games

Necessary access for 2026 in-market games

Traditional TV

YES*, FOX, FS1, ESPN, abc, MLB Network, tbs

** Also available through the Gotham Sports app*

Streaming services

peacock, prime video, NETFLIX, tv

How to watch all episodes of *The Office*



peacock

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For fans, discovery is a bigger hurdle than subscription cost

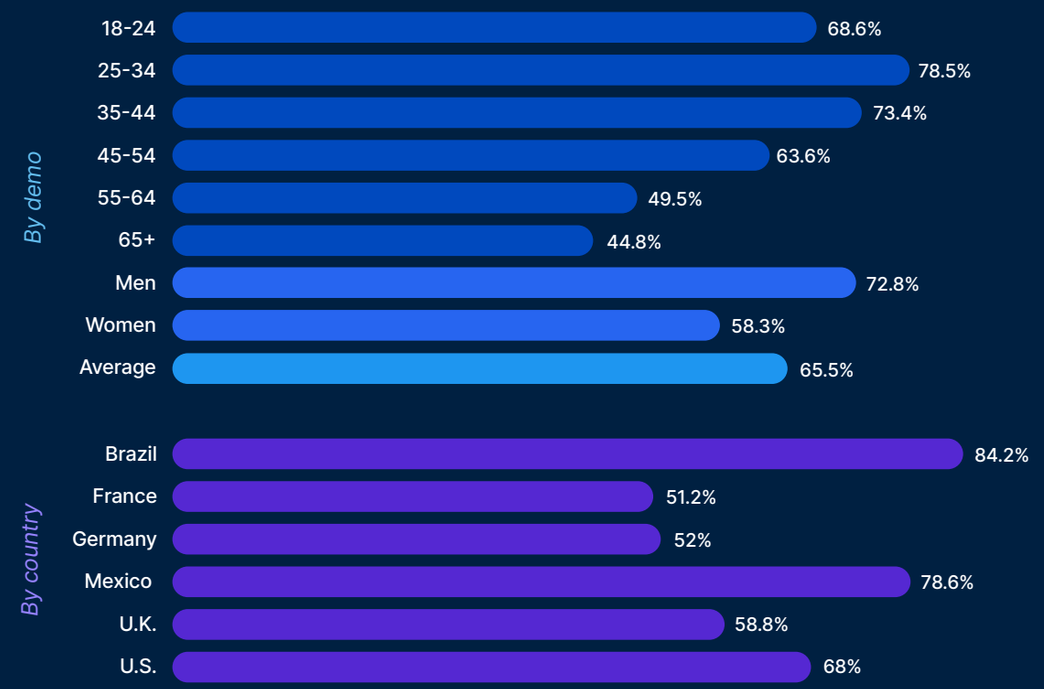
Unfortunately for viewers, sports broadcast data is not standardized, uniform or centralized. The real-time nature of sports, combined with the exclusive and strategic aspect of individual games and events, present unique barriers to establishing unified, open metadata in sports. As a result, fans often struggle to find specific sports events — a challenge that will grow as distribution broadens.

Nearly 52% of streaming viewers say they frequently don't know which channel or service a specific sports event is on

While some parties in the ecosystem are resistant to shared metadata for strategic and financial reasons, the current environment dilutes reach and weakens fan engagement. Sports events that are behind subscription paywalls are often hidden from traditional search, which inhibits discovery. Said plainly, if fans can't find the games they're looking for, they're not going to be able to watch them.

Sports, however, are a huge draw for streaming consumers: More than 65% of streaming consumers say they will pay for a service just for the live sports it offers. The percentage is higher among men, younger viewers and consumers in Brazil and Mexico.

Willingness to pay to watch live sports



Note: Percentages reflect the sum of responses for "very likely" and "somewhat likely" to subscribe for live sports.
Read as: 68.6% of streaming users 18-24 say it's very or somewhat likely that they would pay for a subscription for the live sports it offers.
Source: 2026 Gracenote global streaming consumer survey.

Given fans' willingness to pay to watch sports, content discovery appears to be a bigger challenge for consumers than subscription cost. It also suggests that publishers could be losing more than they're gaining by keeping their sports data under lock and key.

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Here's an example:

During the 2025-26 season, Peacock carried one exclusive NFL game. The Dec. 27, 2025, matchup between the Baltimore Ravens and Green Bay Packers was held on a Saturday, and it had playoff implications for both teams.



Dec. 27, 2025

Average U.S. viewership:
9.7M

Playoff implications notwithstanding, the game pulled in an average of less than 10 million viewers in the U.S., the smallest of the season for a streaming exclusive, and short of the 12.4 million viewers who tuned in for the Week 9 season-low Thursday Night Football game on Amazon Prime Video between Baltimore and Miami.

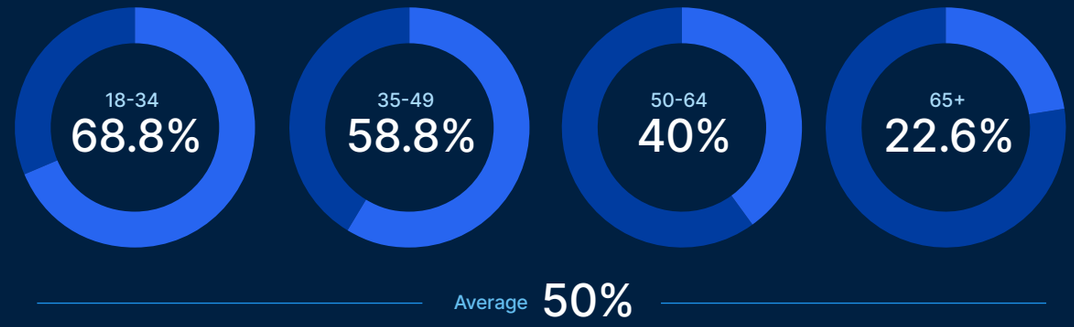
80% of U.S. sports fans say they watch NFL games

From a fan perspective, the NFL is the biggest sports draw in the U.S., with 80% of fans saying they watch NFL games. During the 2025-26 NFL season, the average U.S. viewership was 18.7 million. The massive appeal of the NFL, average viewership and fans' willingness to pay to watch sports suggest that the lackluster viewership for this one game could have been bolstered by greater discoverability.

Scale is a factor here, both in terms of subscriber base and investment in sports rights. Not all publishers have invested in sports as heavily as others, and discovery challenges are higher when a channel or service only carries a game or two within a single season. In these cases, the strategic incentives that keep metadata within individual services and apps may be hurting the benefits of greater discovery — especially when fans are very likely to pay for ***additional*** subscriptions that offer live sports.

Willingness to pay for additional subscriptions for live sports

By age group



Note: Percentages reflect the sum of responses for "very likely" and "somewhat likely" to subscribe for live sports.
Read as: 68.8% of streaming users 18-24 say it's very or somewhat likely that they would pay for a subscription for the live sports it offers.
Source: 2026 Gracenote global streaming consumer survey.

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The takeaway

Despite the lucrative nature of sports rights, the decentralization of game distribution is working against the primary goal of rightsholders, leagues and publishers: the broadest reach possible. This is evident in the viewership data for select sporting events, and discovery challenges could be causing some fans to watch highlights instead of live events. More than 31% of people 18-34, for example, pay for three or more subscriptions for sports. This same group also has the highest preference for highlights.

The pivot to highlights likely reflects more than just discovery challenges, but the willingness to spend more suggests that opting for highlights in certain instances is more correlated with content discovery than cost.

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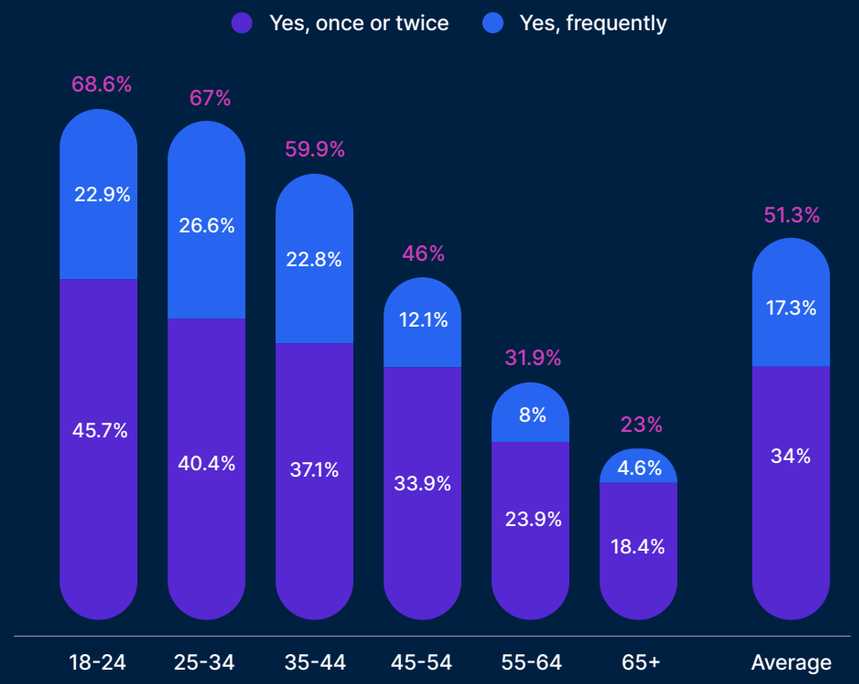
The ramifications of rising frustrations

As consumer frustrations about the streaming experience mount, cancellation risk is rising. On average, 51.6% say they would cancel because they can't find something of interest to watch, which is up from 48.5% last year.

Even the presence of high-profile content doesn't remove the risk. That's because many people sign up for specific programs and then cancel right after watching them. This behavior is more common among younger viewers.

One and done

Many streaming viewers sign up for something and then cancel



Read as: 45.7% of streaming consumers ages 18-24 have subscribed to watch a program and then directly canceled it after watching it on one or two occasions.
Source: 2026 Gracenote global streaming consumer survey.

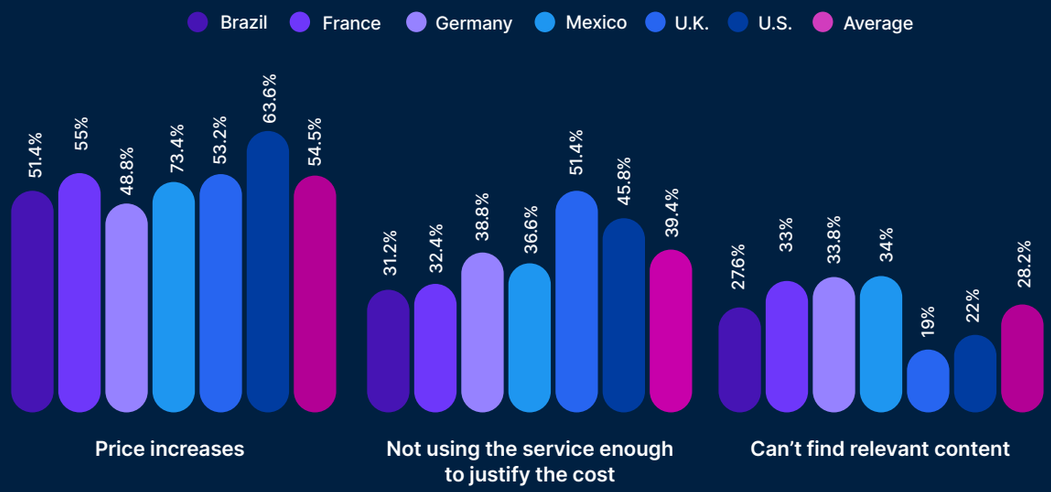
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A better UX will drive long-term customer value

Price will always be a consideration when it comes to cancellation consideration, but as catalogs grow and the number of services increase, the right content — and connecting it to the right viewers — is critical to establishing long-term customer value.

Top three reasons people cancel streaming subscriptions

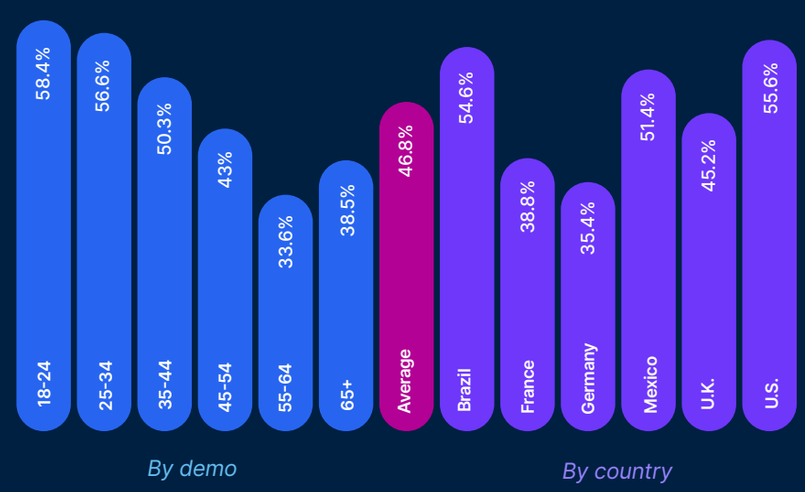


Read as: 51.4% of streaming consumers in Brazil say they would cancel because of price increases.
Source: 2026 Gracenote global streaming consumer survey.

Nearly 35% of streaming viewers say they spend more time watching FAST channels because the subscription landscape has become so overwhelming

Rewatching is another behavior that highlights content discovery challenges. On average, 46.8% of streaming viewers say they often rewatch something they've already seen instead of looking for something new. Percentages are higher among younger viewers and viewers in Brazil, Mexico and the U.S.

Rewatching, not discovering



Note: Percentages reflect the sum of "strongly agree" and "somewhat agree" with the statement that the amount of content and services has grown so much that viewers typically rewatch shows and movies they've already seen instead of trying to find something new.
Read as: 58.4% of streaming consumers ages 18-24 say they tend to rewatch shows and movies instead of trying to find something new.
Source: 2026 Gracenote global streaming consumer survey.

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The takeaway

Most streaming services and apps offer more content than viewers could ever watch, and catalog volumes will only increase going forward. The most-watched content, however, highlights just how concentrated viewership is on a small portion of what's available. Four syndicated programs, for example, were among the 10 most-watched shows in 2023, 2024 and 2025. Three others were on the list in 2024, 2025 and the first half of 2026[2].

Streaming catalogs are the core value proposition for any service or app, but much of what's available goes largely unnoticed. The real downside here is that viewers are frequently looking for something new, but they often choose to rewatch something they've already seen, or they abandon their searches altogether.



[2] Nielsen Streaming Content Ratings: *Bluey*, *Grey's Anatomy*, *NCIS* and *The Big Bang Theory* were on Nielsen's annual top 10 most-watched lists in 2023, 2024 and 2025. *Law & Order: SVU*, *SpongeBob SquarePants* and *Bob's Burgers* were among the top 10 in 2024, 2025 and the first half of 2026.

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Closing thoughts

As wild as it sounds, consumers want their streaming experience to be even closer to that of traditional TV, with 72.3% saying they wish there was a way to consolidate the guides from all of the services they use so they could watch based on everything they have access to. And nearly 70% want their services to tell them where they can find what they're looking for, even if it's on a different service.

This desire for centralization and ease of navigation underscores a fundamental shift in audience expectations. Content remains a key driver of sign-ups, but user experience will determine whether viewers stay. Here, an overwhelming 87.4% of viewers place considerable importance on the user experience when deciding which services to keep, which is up from 84.2% a year ago.

As alluring as the choose-your-own-adventure once was, consumers are ready for the experience to come full circle. To earn loyalty and prove long-term value, publishers will increasingly need to invest in intuitive discovery tools that put the viewer back in control of finding what they're looking for.

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Data sources

Gracenote's 2026 streaming consumer survey

This report leverages survey responses from streaming TV consumers in Brazil, France, Germany, Mexico, the U.K. and the U.S. Respondents needed to be 18 or older and stream video either through a connected device or a smart TV. The survey was conducted online and was fielded Aug. 11-Aug. 19, 2026. The report data reflects the responses from a total of 3,000 respondents (500 per country).

Gracenote 2026 global sports fan survey

This report includes survey responses from 3,000 sports fans in Australia, Brazil, Germany, Mexico, the U.K. and the U.S. (500 respondents per country). Respondents needed to be 18 or older, and they needed to affirm that they watch sports on TV. The survey was conducted online and was fielded June 29-July 8, 2026.

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 and nearly 2,100 FAST channels, along with availability for 260+ streaming catalogs.