



horizon *futures* + **ROKU**

FAST is Vast

Demystifying Streaming TV's Next Frontier

But first, what is FAST?

Free, Ad-Supported Streaming TV is free, live, linear streaming programming.

FAST is free, live streaming content delivered on a schedule in a familiar, electronic programming guide (EPG) format within streaming apps like Roku Channel.

Traditional TV

Live, linear scheduled programming across cable, satellite, and broadcast networks.

Broadcast TV

Cable TV

Satellite TV

Streaming TV

Live and on-demand programming distributed via the internet to connected TV platforms, such as Roku OS.

Paid Streaming TV

Ad-Free SVOD

Paid on-demand content without ad breaks

Ad-Supported SVOD

Paid on-demand content with ad breaks

Free Streaming TV

Ad-Supported VOD

Free on-demand content with ad breaks

FAST

Free live-feed content with ad breaks

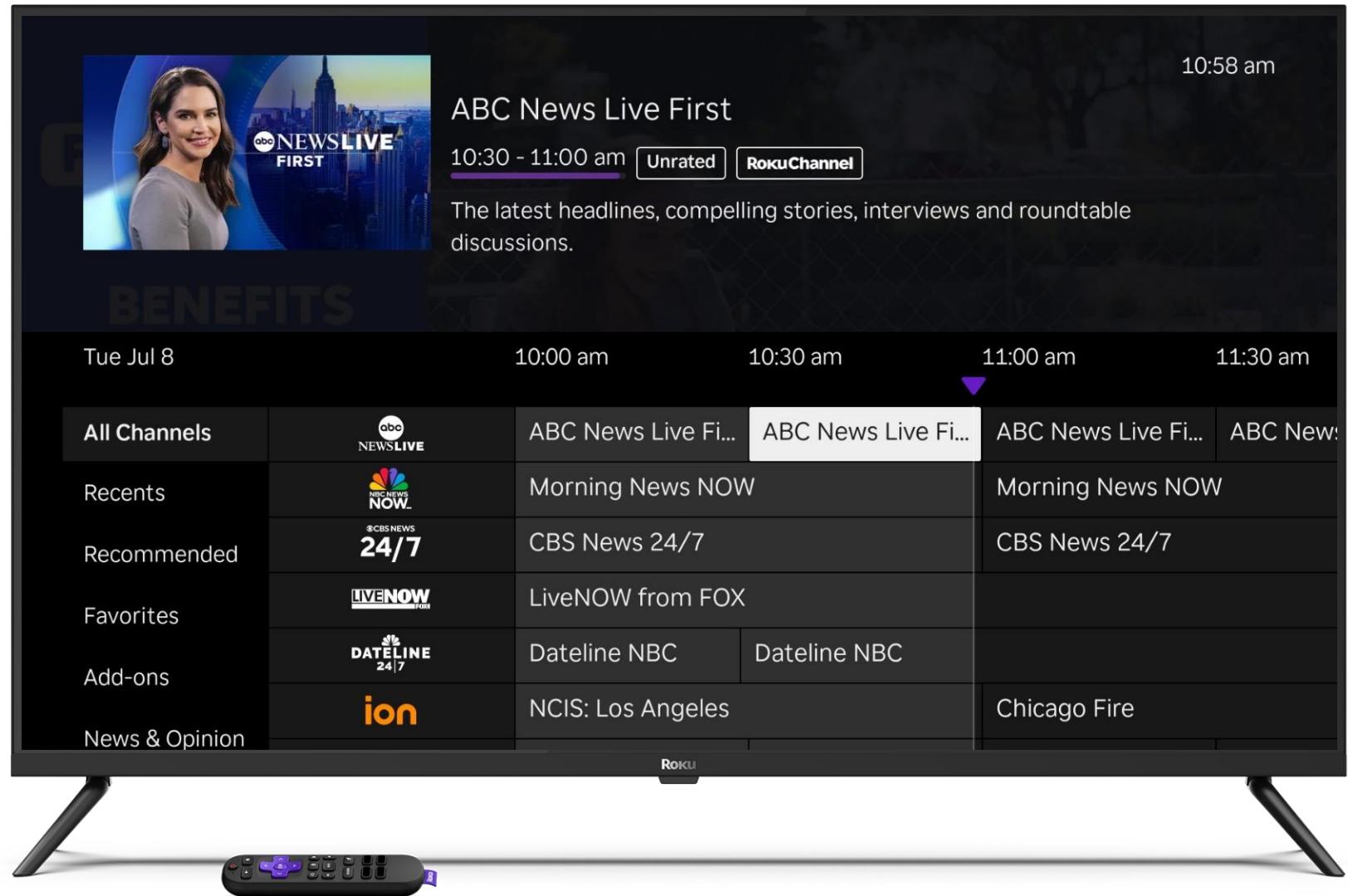
What is FAST?

Free Ad-Supported Streaming Television

Premium TV content delivered in a familiar, lean-back, pre-programmed environment.

Viewers perceive paid VOD and FAST platforms as equally effective at delivering themed content collections and channels.

Examples of these collections / channels includes the Crunchyroll Channel, the Bob Ross Channel, and the Hell's Kitchen Channel.



What is FAST?

More live TV to love.

A seamless “sit back and stream” experience with hundreds of channels from a range of TV programmers, digital creators, and iconic properties.

Major Studios

AMAZON
MGM STUDIOS

Disney

Paramount
A SKYDANCE CORPORATION



Top Networks

abc NEWS

amc

CBS SPORTS

NBC

Marquee Sports

ROKU
SPORTS
CHANNEL

ESPN

NBA



Content Creators



Popular Television

60
MINUTES

SATURDAY
NIGHT
LIVE

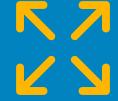


FAST is the New Normal

FAST is vast.



64% of US Roku households stream FAST across a variety of ad-supported channels.



If FAST viewership across all channels were aggregated into a single app, it'd be the 4th largest on Roku by reach.



More US households stream FAST on Roku than watch TNT, TBS, CNN, and Fox News on traditional cable TV.



Most Roku streamers can identify that they watch FAST platform(s), validating FAST as a distinct media environment.

Formerly traditional TV and SVOD-only homes contribute to exponential FAST growth.

Streaming TV Shifts

262x

Since 2020, Roku Channel FAST has grown 262x faster than the total TV Streaming market, according to Nielsen.

57%

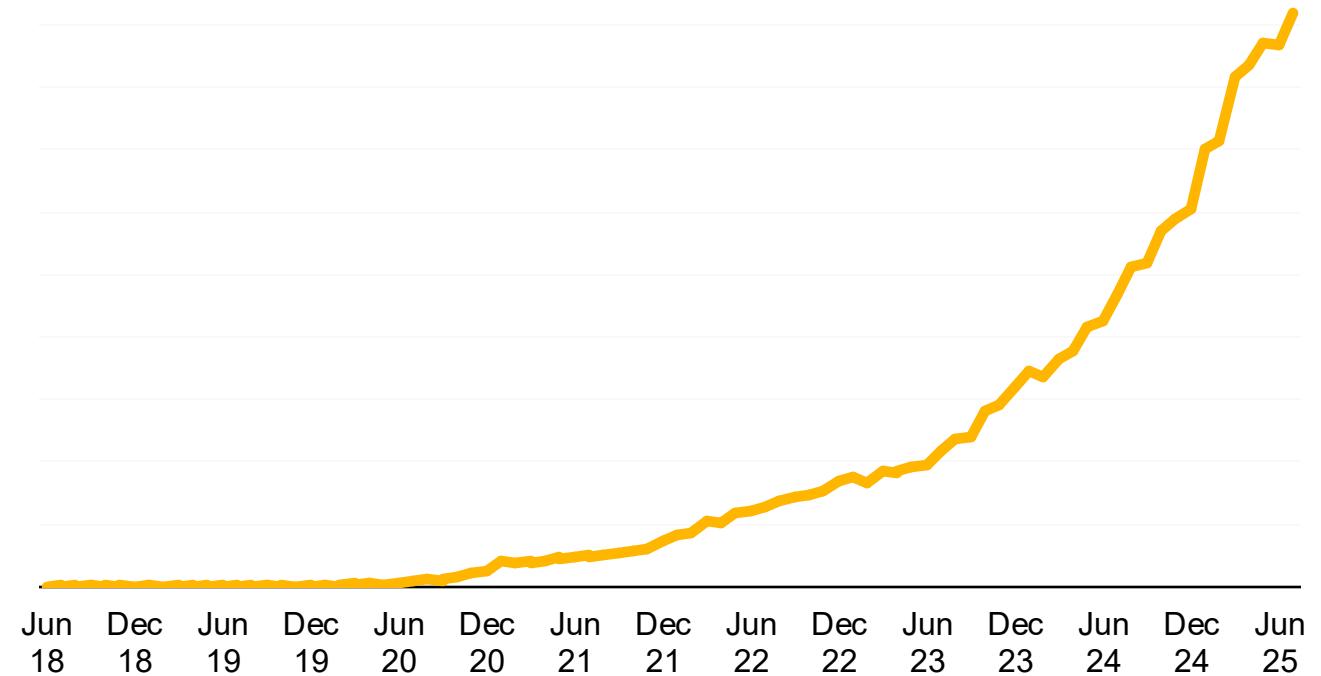
of Roku homes that *only* streamed SVOD channels in Q1 2020 are now watching FAST.

Traditional TV Shifts

70%

of FAST viewers on Roku are cordless.

FAST on Roku Channel • Monthly Hours Streamed



FAST Hosts Your Essential Content

Most FAST time is spent with Entertainment content.

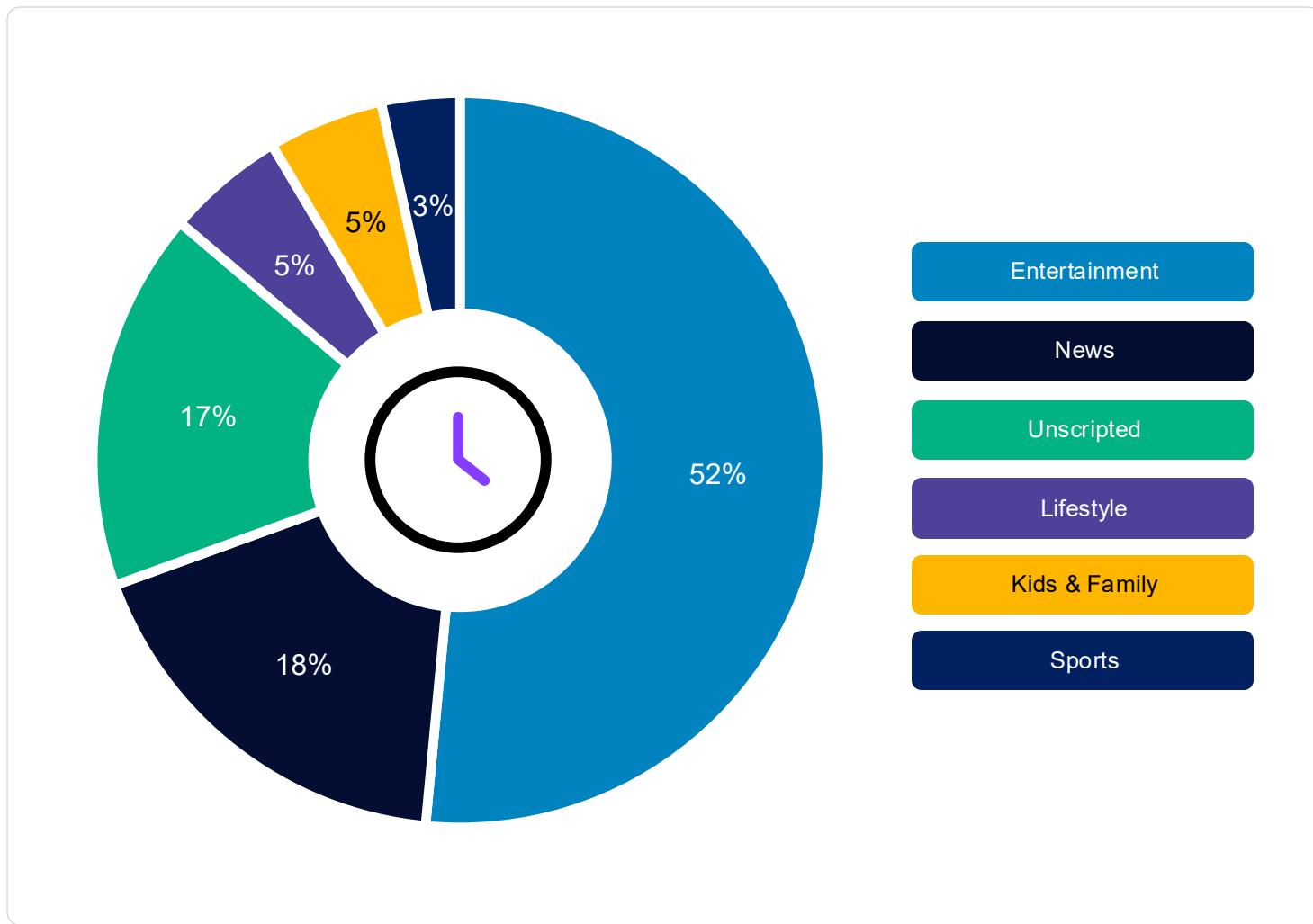
Viewership on FAST does not differ from the rest of the streaming landscape. Across both FAST and VOD on the Roku Channel, most time spent is with professionally-produced content.

Further, to consumers, price does not equal quality. Most viewers do not feel as though content being expensive to access determines the quality of that content.

1,000+

Oscar, Emmy, and SAG-nominated titles streamed for free on Roku Channel's FAST in the last year.

Share of FAST Hours • Roku Channel



FAST channels and titles reflect a range of interests.

TV

Familiar favorites on FAST channels like *The Goldbergs*, *The Conners*, *Cheers*, *Frasier*, and *NBC Comedy Vault* have been performance drivers on Roku in 2025.



Movies

Channels like Miramax Movies, MOVIESPHERE by Lionsgate, and BET x Tyler Perry Comedy were among the fastest-growing in the first half of the year.



Sports

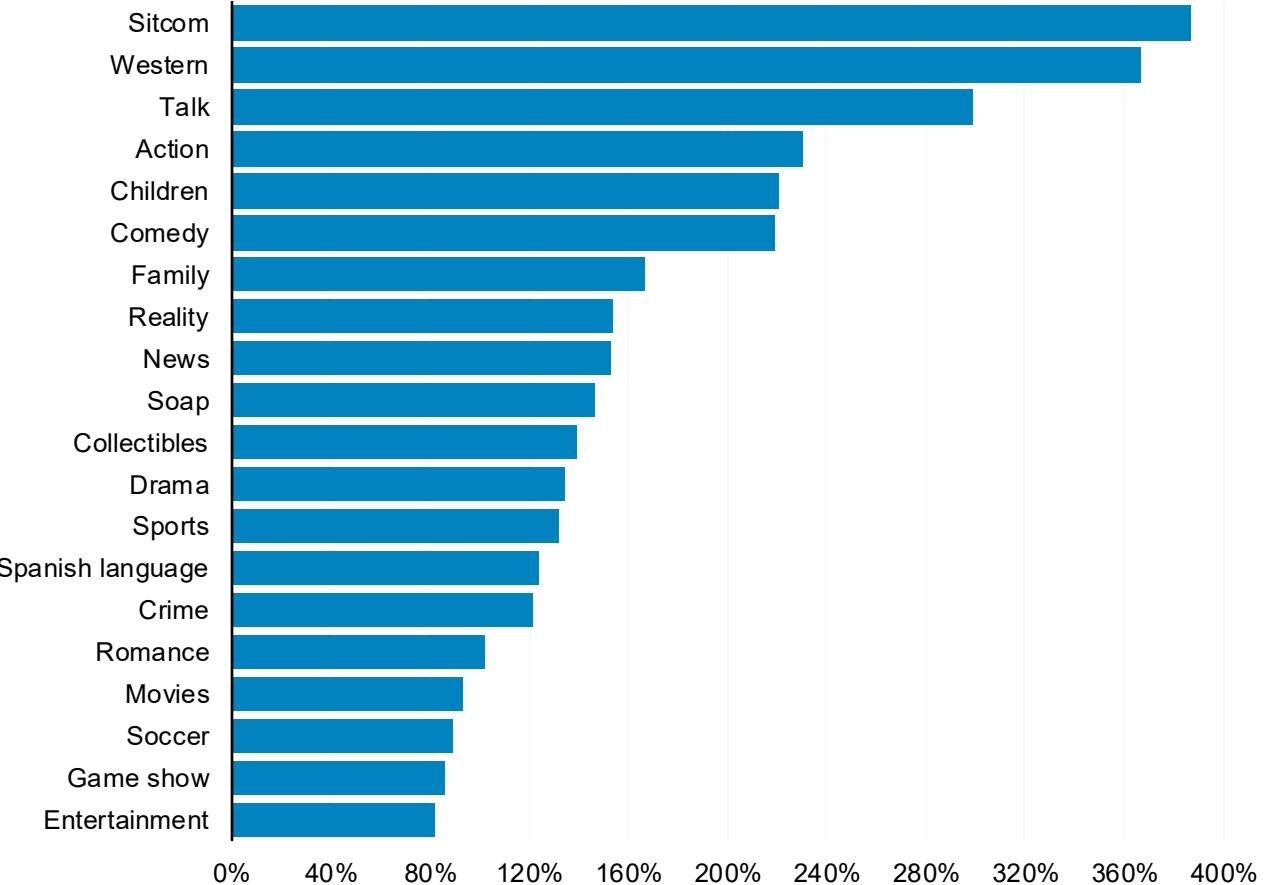
Aligning with Sunday Leadoff and Sunday football, 42% of weekly Roku Sports Channel hours are streamed on Sundays. MLB and NBA FAST channels have each grown triple-digits in 2025.



Entertainment categories are among the highest-growing on FAST

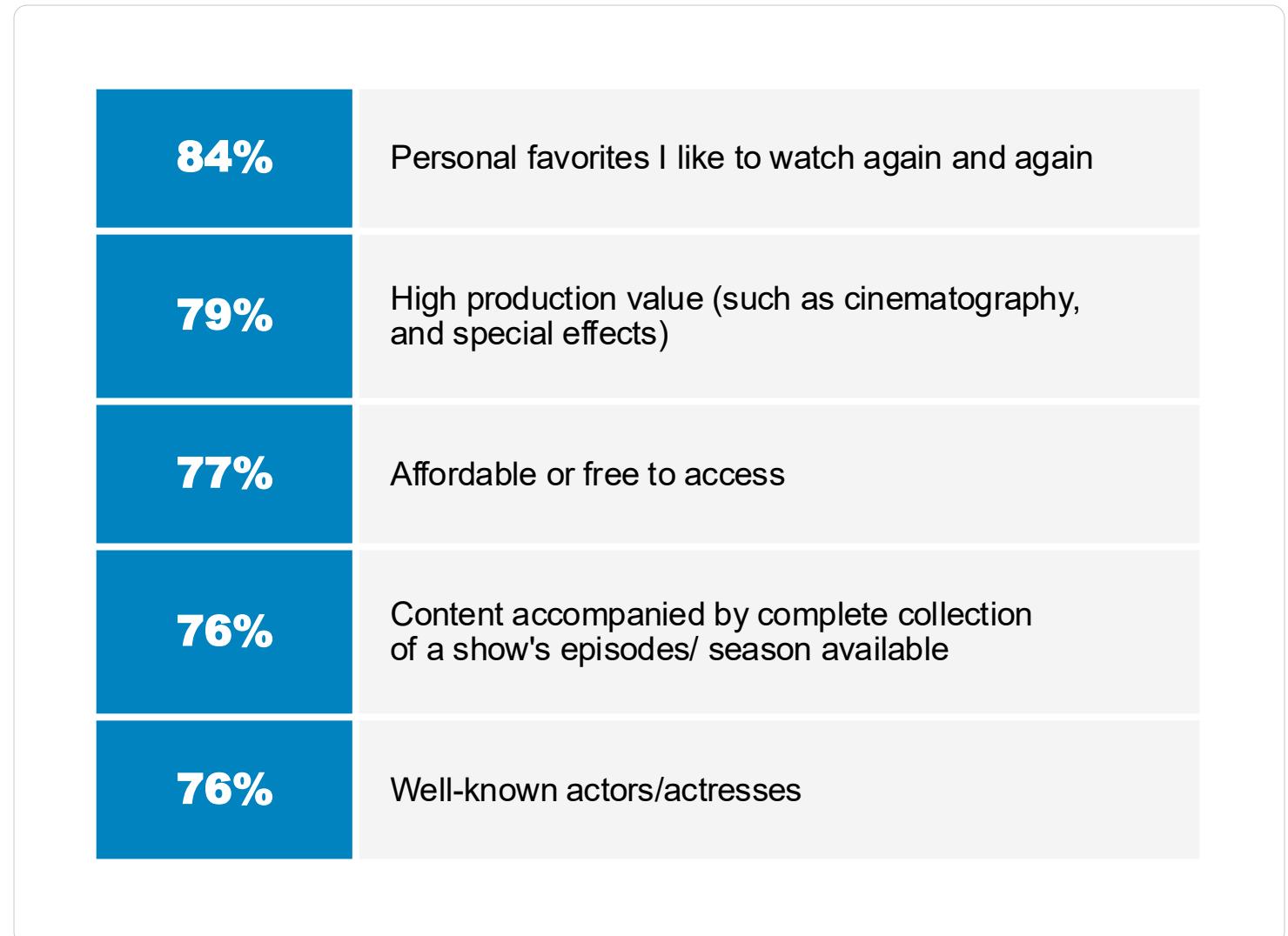
Viewers select what to watch based on contextual relevance far more than they had in cable – leading to the rise of sitcoms, Westerns, and talk programming.

Year-Over-Year Growth in Streaming Hours by Roku Channel FAST Channel Genre



Quality content is defined by inclusion of personal favorites and production value.

Viewers are
12%
more likely to feel that FAST
delivers premium or high-quality
content than linear.



Streamers love the content that lives on FAST.



Entertainment favorites win for FAST. To streamers, the top marker of premium content is the inclusion of personal favorites that they like to watch again and again, followed by high production value.

More than half of streamers feel as though FAST has personal favorites that they like to watch and again.

Over a third of streamers watch FAST because it features their favorite titles. A quarter of these consumers ranked this as the primary reason they watch FAST.

Half of streamers watch FAST because it has popular content from the past that is new to them or because FAST features unique or retro content not found in mainstream programming.

FAST consumption ebbs and flows across a day in the life.

Roku Channel FAST viewership follows the familiar, patterns of traditional life – affording advertisers highly relevant contextual engagement opportunity. Viewership experiences the same ebbs and flows as cable TV, rising throughout the day before peaking during primetime.



FAST is the Next Frontier

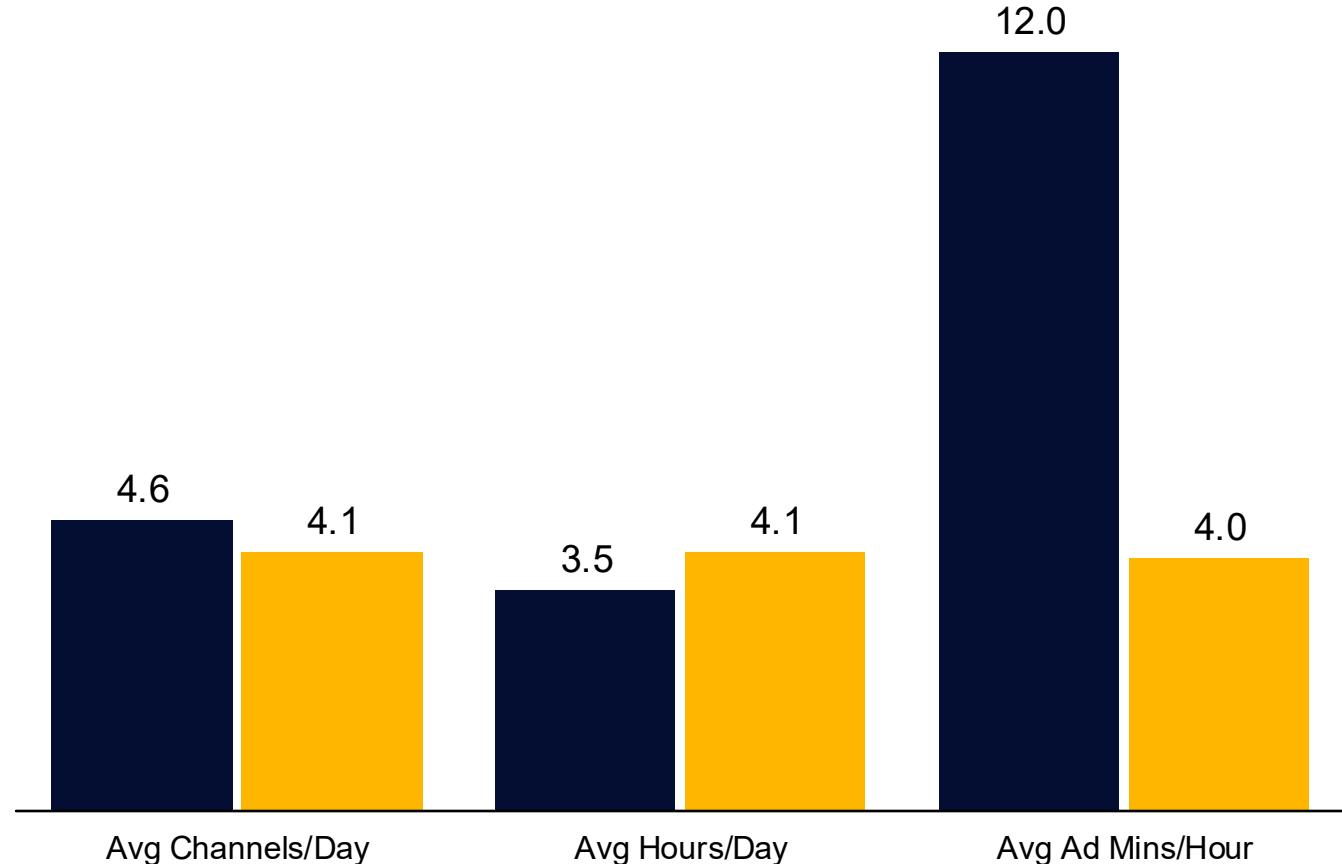
Viewers watch FAST similarly to cable, with less ad clutter and more attention.

Roku Channel FAST viewers consume roughly the same amount of content and channels as they did on cable, but with 1/3 the ad load – making it easier for advertisers to stand out.

About 40% of streamers watch FAST because it feels like traditional TV with a guide and always-on content.

Cable and Roku Channel FAST Comparison

Cable FAST



Viewers watch similar content across FAST and cable.

Professionally-produced entertainment is the largest viewing category on both Roku Channel FAST and cable.

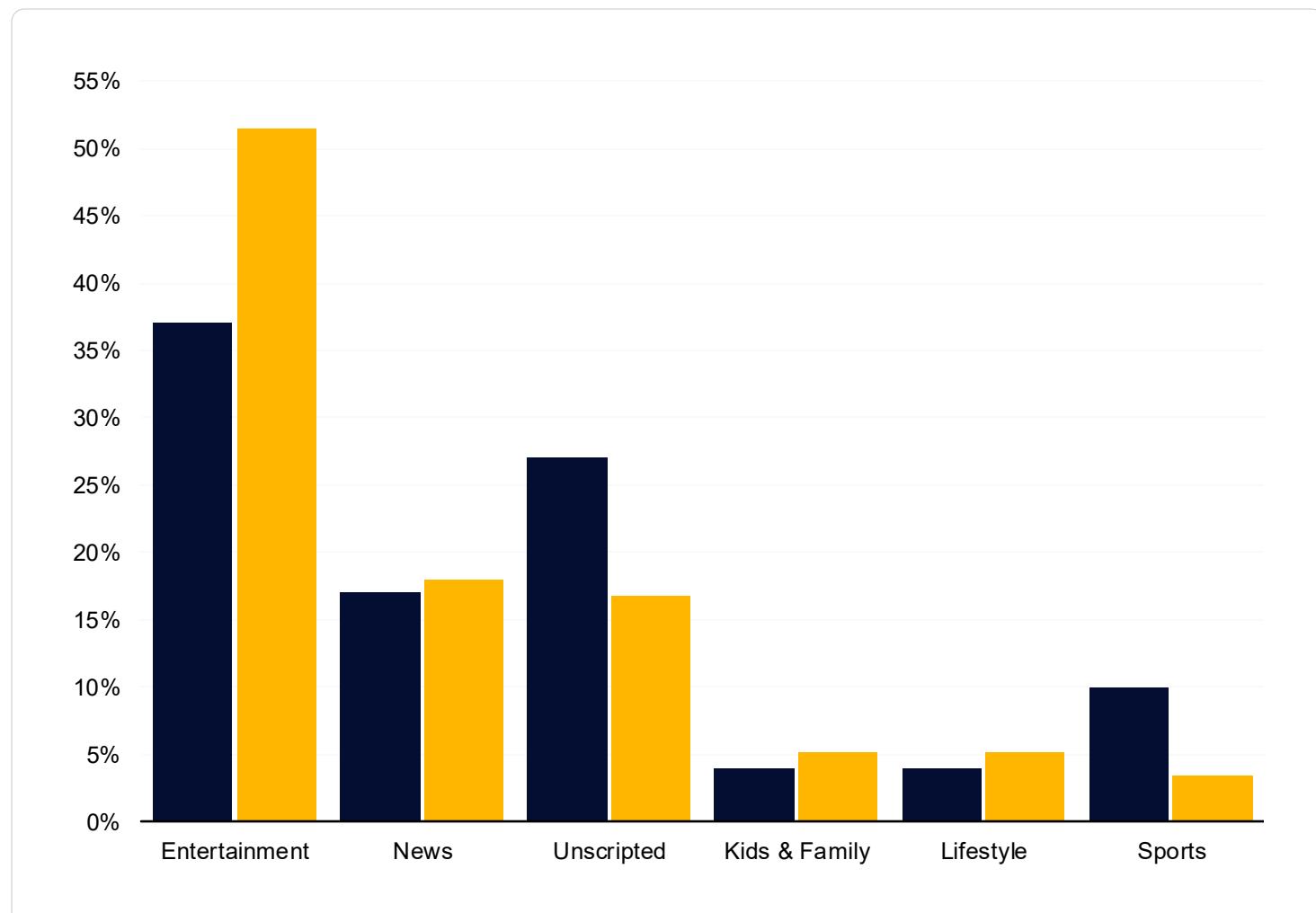
Roku Channel FAST and cable viewers watch News at the same rates, making up more than 1 in 6 viewership hours.

FAST has become a cable replacement: in the weeks after cutting the cord, 65% of homes start watching an hour or more of FAST per week.

Streamers perceive FAST content as higher quality and more premium than that of traditional linear TV.

Share of Streaming Hours by Genre • Q1 2025

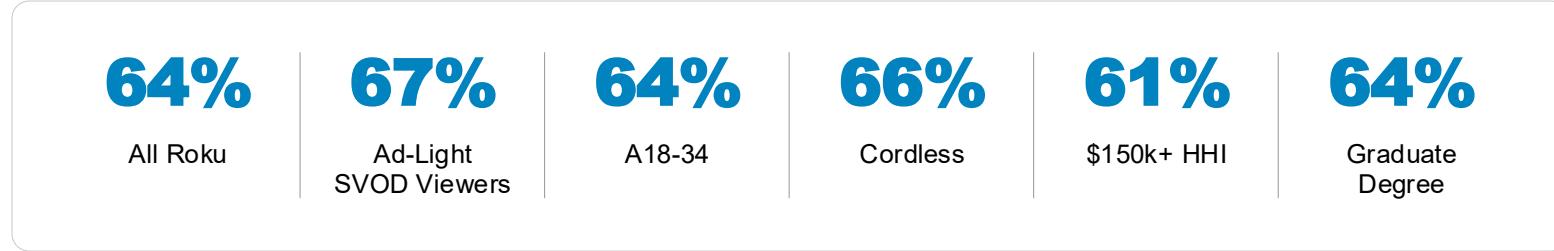
Cable FAST



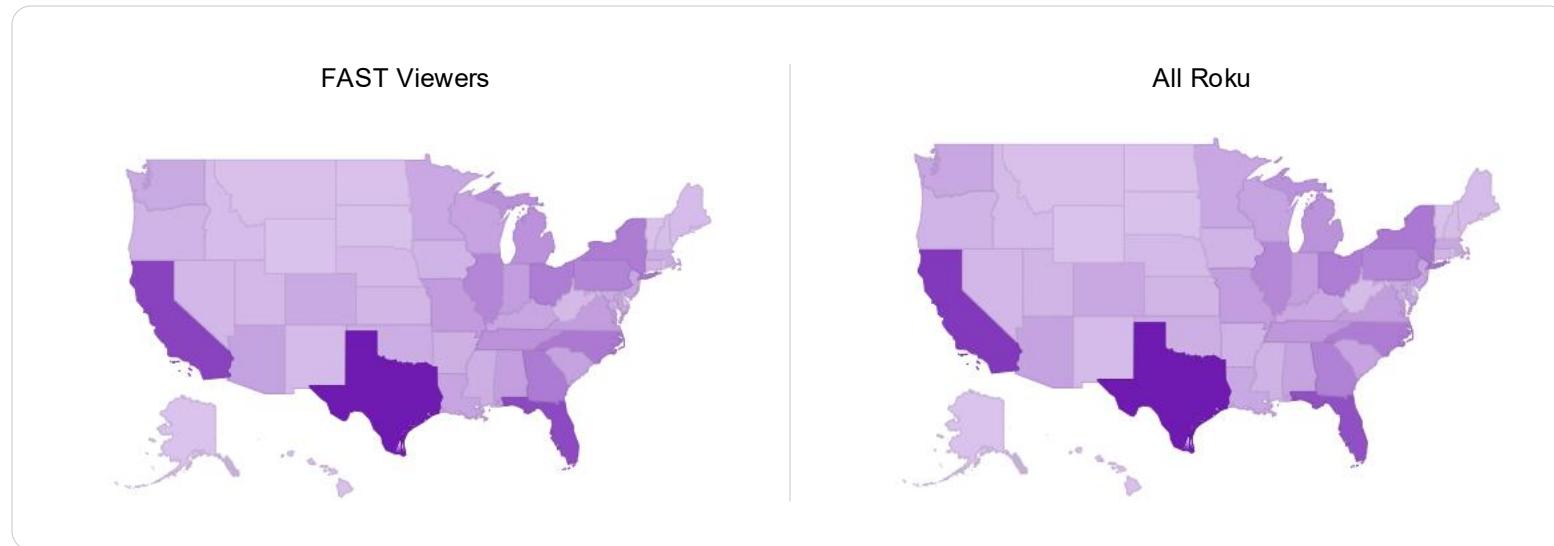
FAST is for Advertisers

As FAST becomes mainstream, it mirrors Roku's full viewer base.

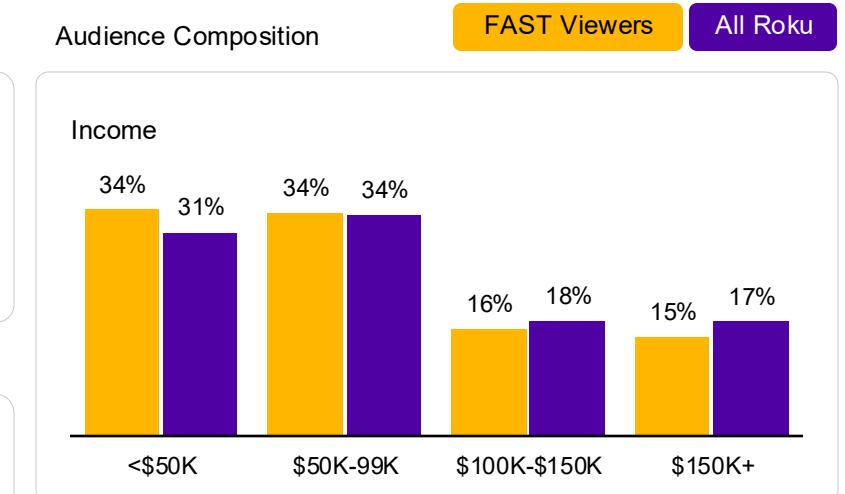
FAST Viewership Rates by Audience on Roku



Geographic Distribution



Audience Composition

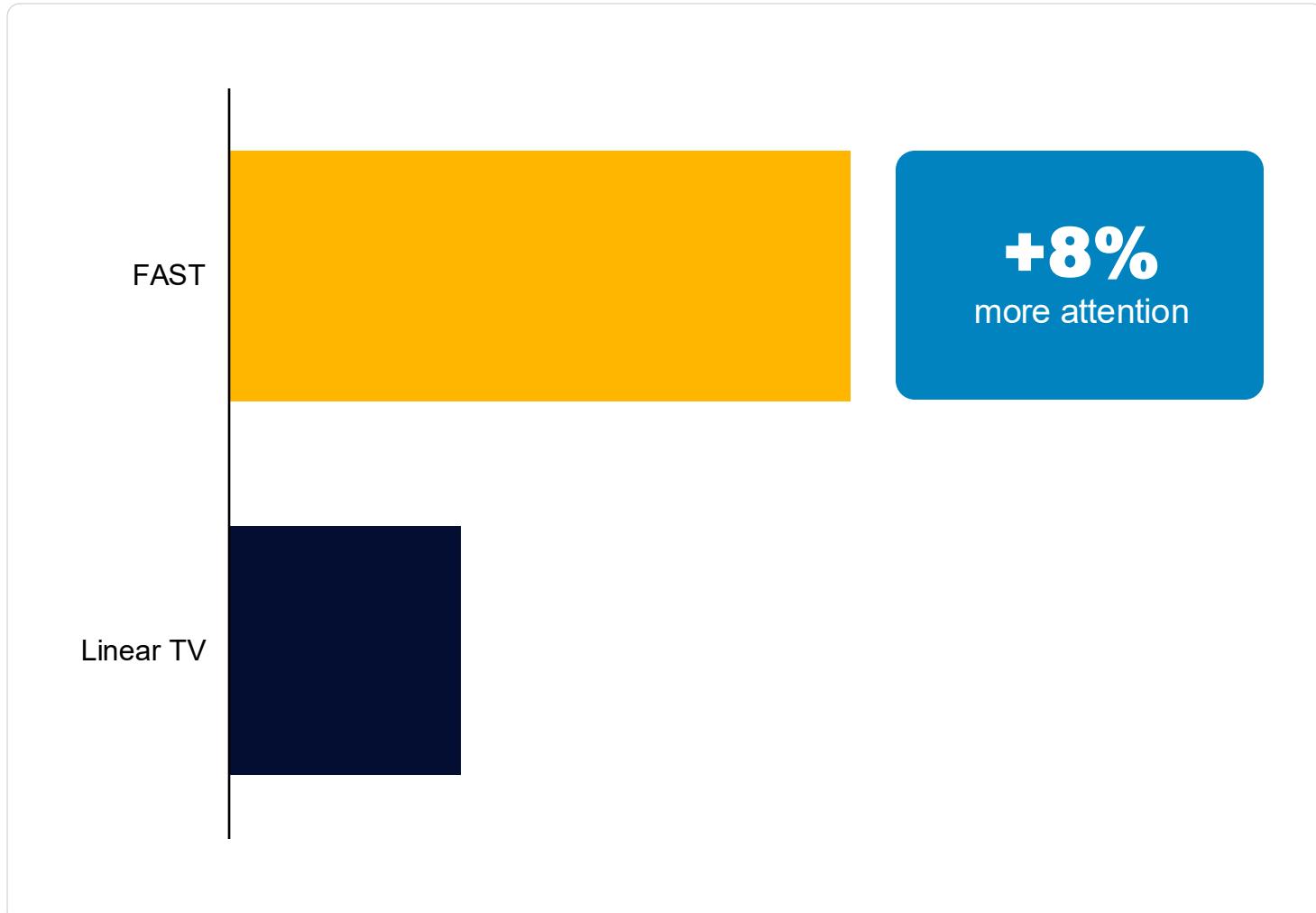


FAST drives more attention than Linear TV.

On average, ads in FAST ads deliver even more attention than ads on linear TV.

60% of streamers direct all or most of their attention while watching content on FAST.

Attention Units by Media Type • Adelaide Attention Norms



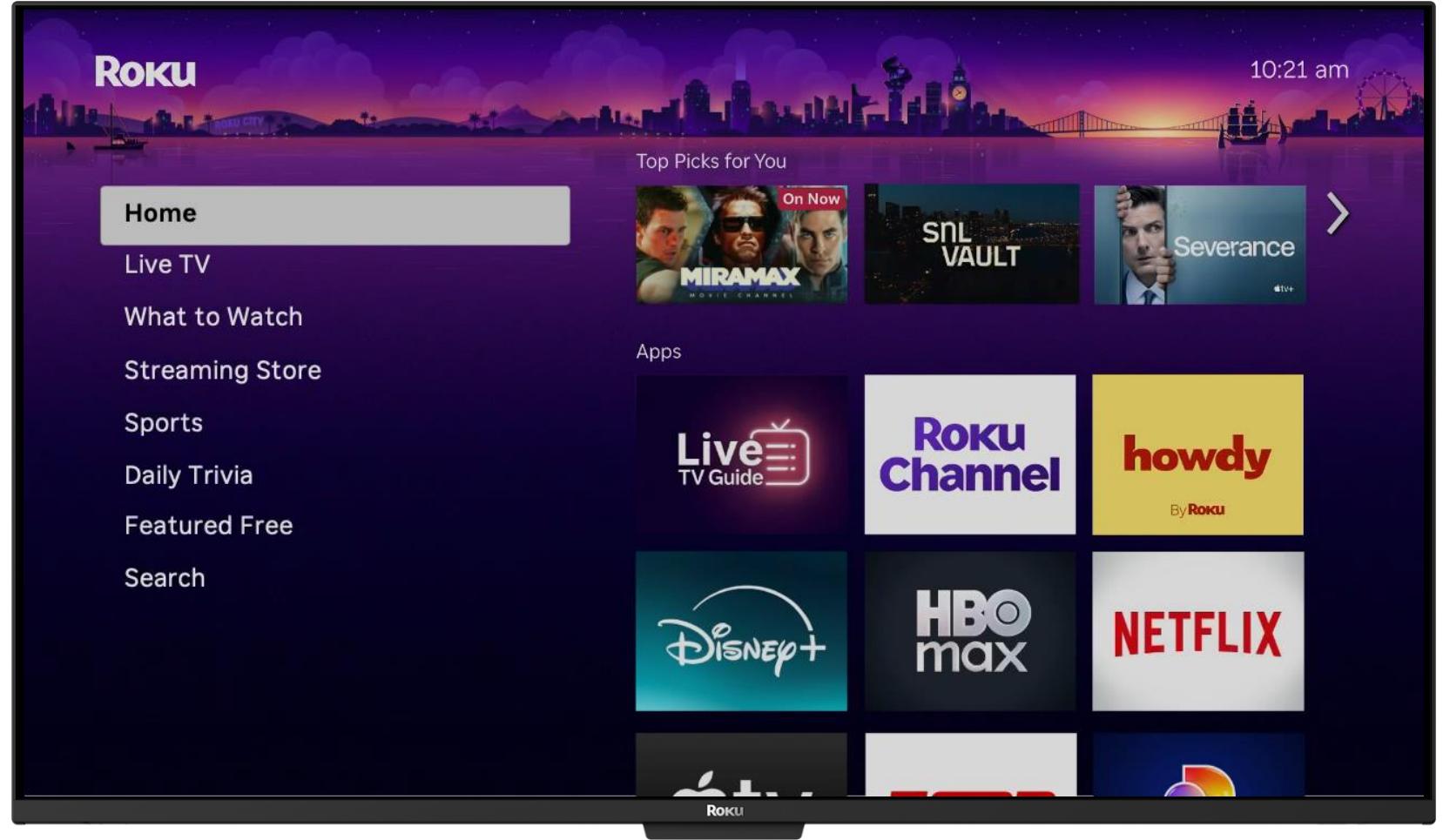
FAST is Biggest on Roku Channel

The Roku FAST experience begins from the moment viewers power on their TV.

The Roku Home Screen is an industry-leading driver. Roku streamers are 13% more likely than non-Roku streamers to agree that "it was the first thing I saw on my TV" as their top driver to watch FAST.

87%

of Roku Channel FAST
Viewership comes from Home
Screen vs. Roku Channel app tile.



Roku Channel's FAST audience isn't watching FAST anywhere else.

Roku streamers watch FAST for its content. A quarter of Roku streamers feel the *most important* reason they watch FAST content is because it features their favorite titles.

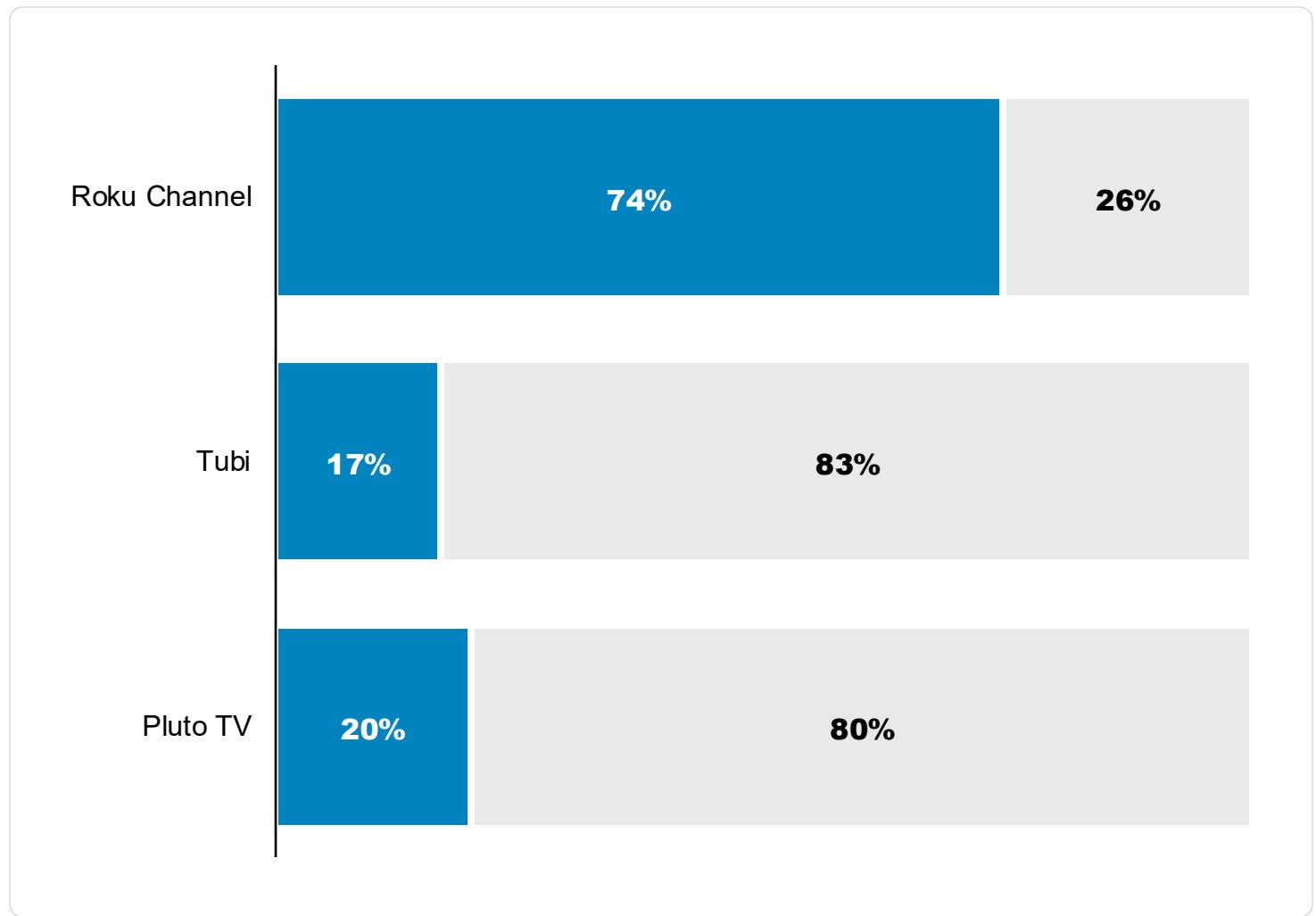
9 in 10

FAST streaming hours on Roku happen in Roku Channel.

Exclusive Reach Compared to Other FAST Apps • Q1 2025

Exclusive

Overlapped

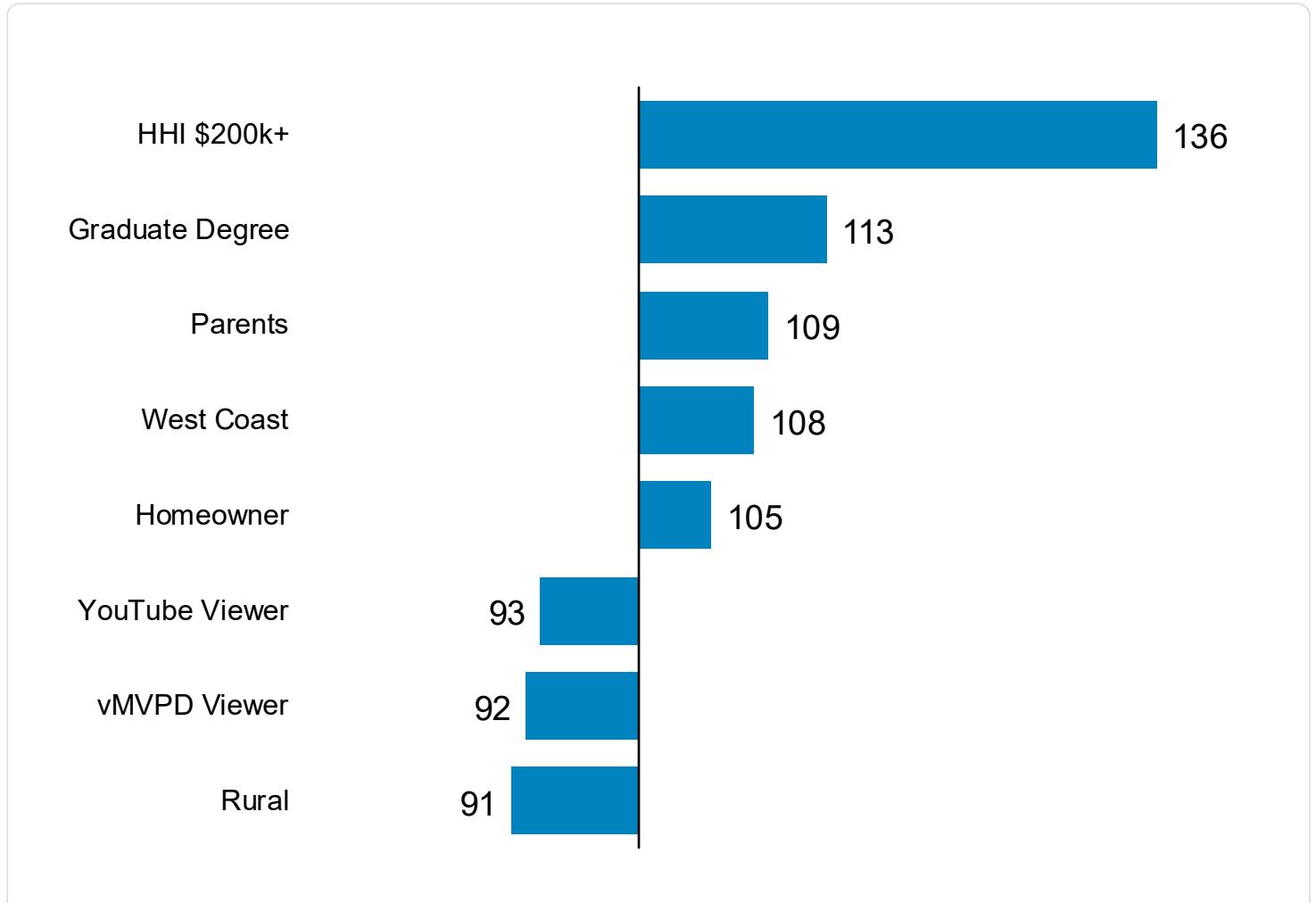


FAST attracts a harder-to-reach audience on Roku Channel.

With availability across Roku's home screen touchpoints, FAST on Roku Channel appeals to a broader audience.

Compared to other FAST audiences, Roku Channel FAST viewers are more affluent, educated, and coastal.

Roku Channel FAST Audience • Index vs. Other Apps' FAST Audiences on Roku



The FAST Opportunity is Vast

1	FAST is the new normal	64% of Roku households stream FAST content. If FAST streaming were an app, it'd be the 4th largest app on Roku.
2	FAST hosts essential content	Entertainment content makes up over half of FAST time, though viewers also watch premium News, Lifestyle, Unscripted, Kids & Family, and Sports titles — all for free.
3	FAST is the next frontier	Streamers watch FAST channels the same way Traditional TV viewers watch cable, with higher engagement. Viewers turn to FAST after cutting the cord.
4	FAST is for advertisers	FAST reaches 64% of Roku homes, with an audience composition mirroring the Roku's full viewer base. FAST drives meaningful attention and scale.
5	FAST is biggest on Roku Channel	Roku Channel is the leader in FAST and 87% of Roku Channel FAST viewership comes from our home screen discovery experiences, not the app tile.



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