

# FAST Landscape Study

A 2024 U.S. FAST market update

# FAST isn't fleeting, it is becoming firmly entrenched in consumer's entertainment habits



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“Recently, a lot of research has been done about the growing popularity of FAST, and how it’s being readily embraced by both content owners and consumers. This report dives deeper taking an in-depth look at FAST engagement, exploring FAST topics like, who is watching, when they’re watching, and how their viewing patterns compare to other major forms of entertainment.

The findings reveal that FAST usage is following similar engagement levels as other major forms of entertainment consumption like traditional pay TV, SVODs and social media, underscoring how it’s becoming an increasingly reliable source of entertainment for today’s viewers.

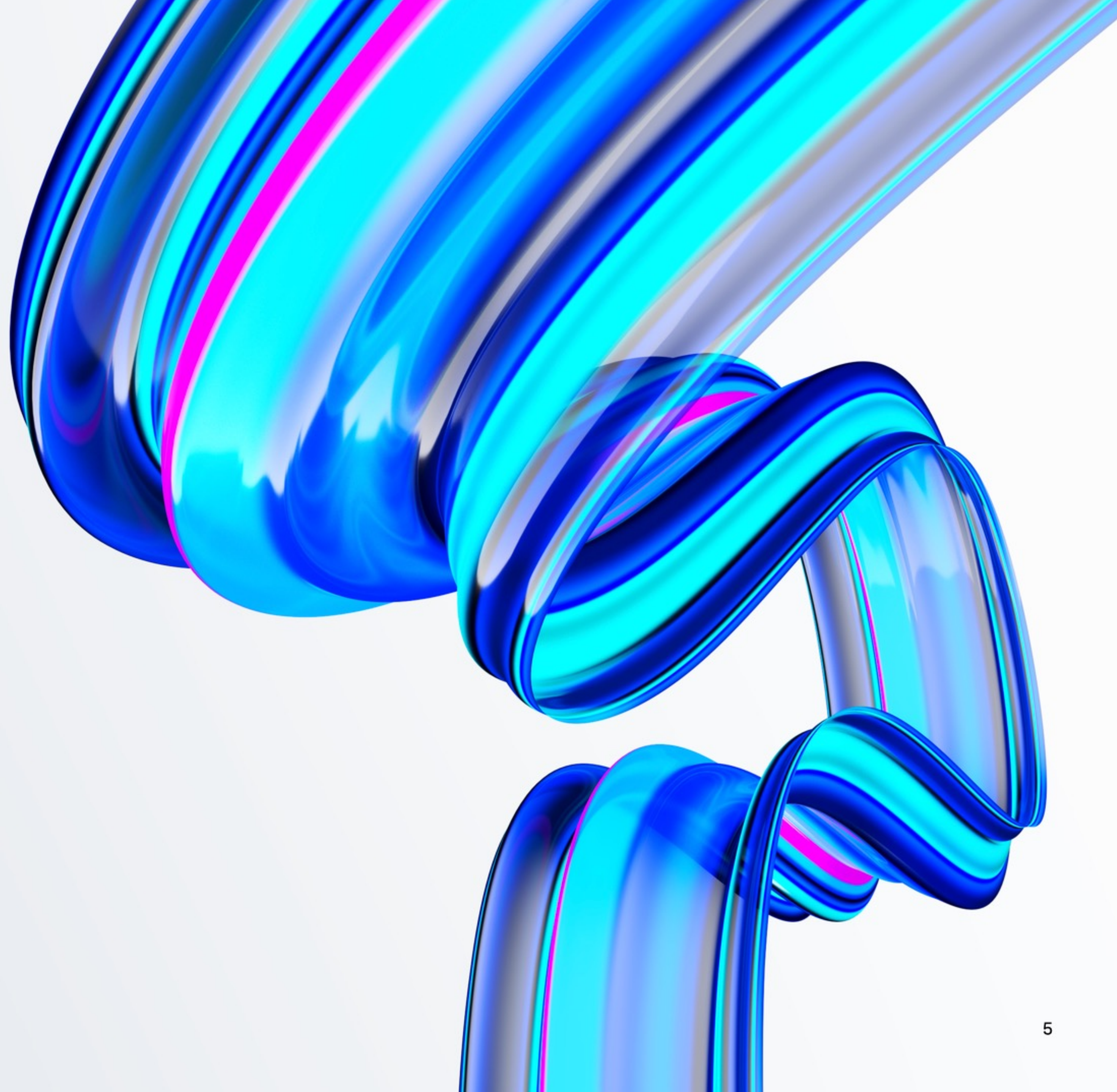
With other key findings like a comparison of FAST usage amongst pay-TV customers, cord-cutters, and cord-nevers, this report goes a long way in equipping the industry, including content owners and advertisers, with meaningful insights into the role FAST plays in consumers’ evolving entertainment decisions.”

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# 01

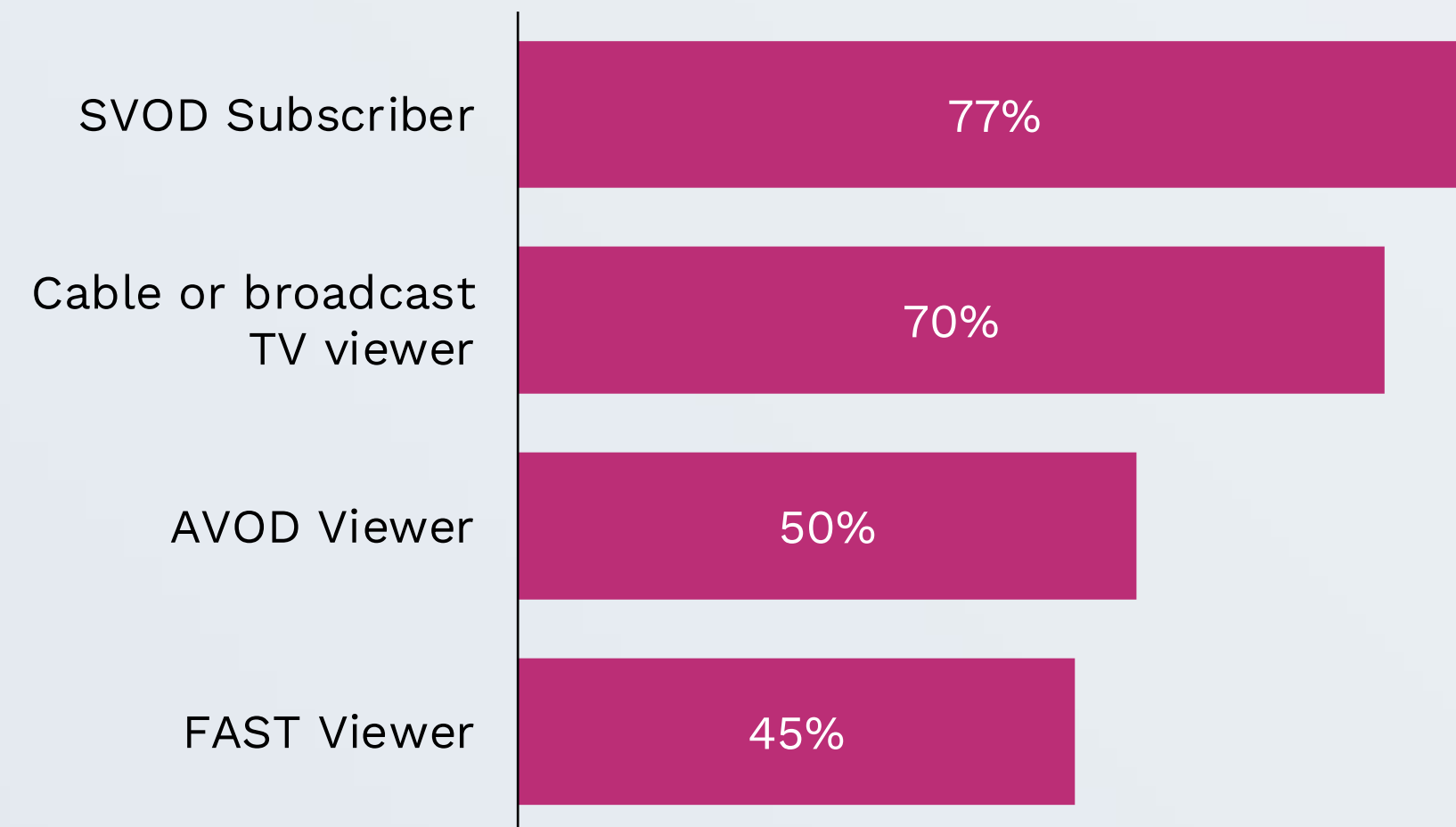
FAST viewership vs.  
Other media formats



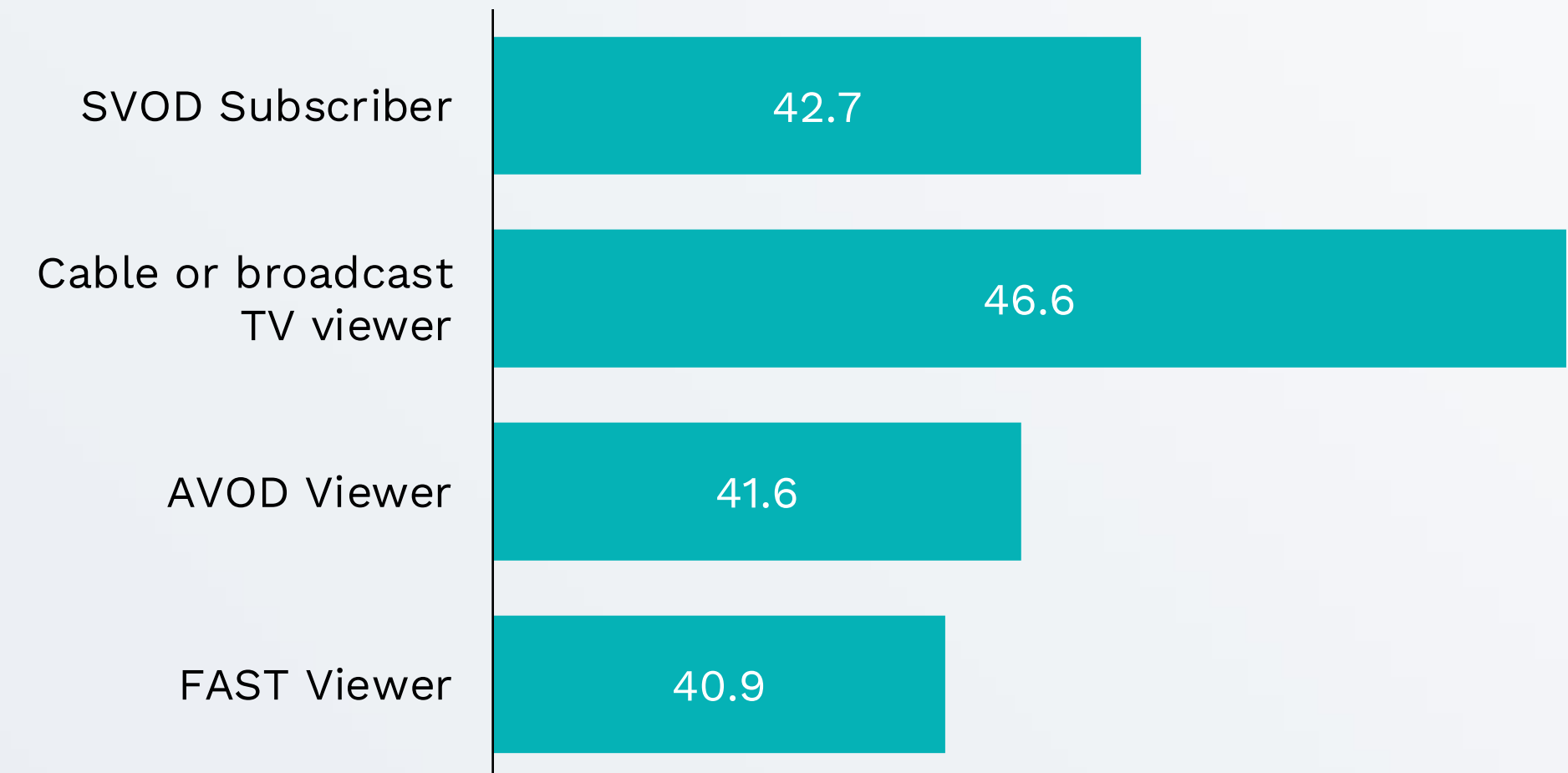
# FAST viewers are younger than TV viewers

While TV has more regular viewers than FAST,<sup>1</sup> those watching FAST tend to be younger<sup>1</sup>

## Total Users of Entertainment Formats



## Average Age of Format Users



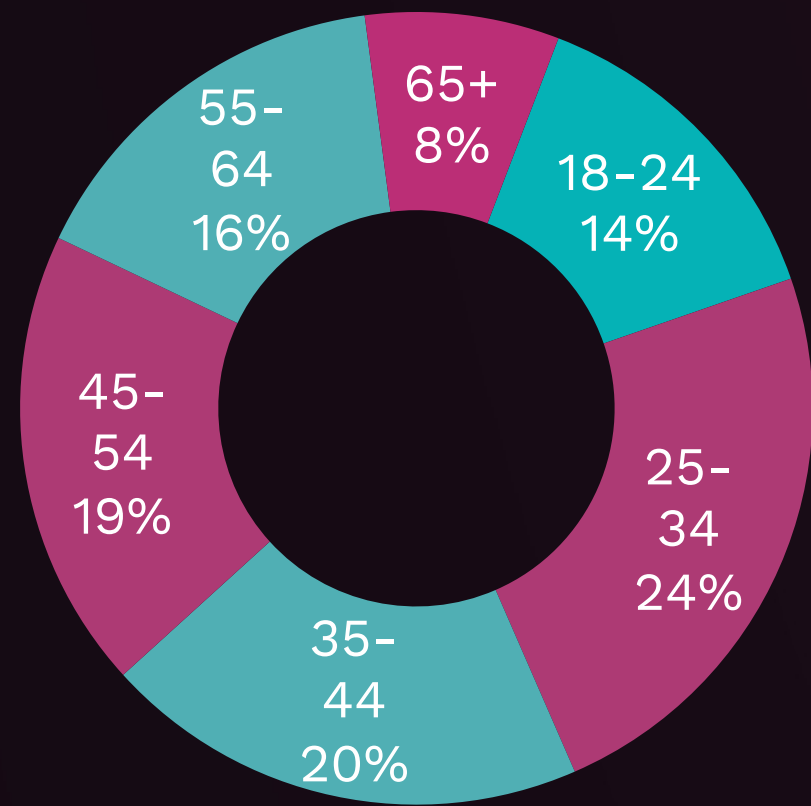
The background features a dynamic, abstract composition of flowing, multi-colored lines in shades of blue, cyan, and magenta. These lines create a sense of motion and depth, resembling liquid or energy currents. The overall aesthetic is modern and high-tech.

# 02

Who is watching FAST?

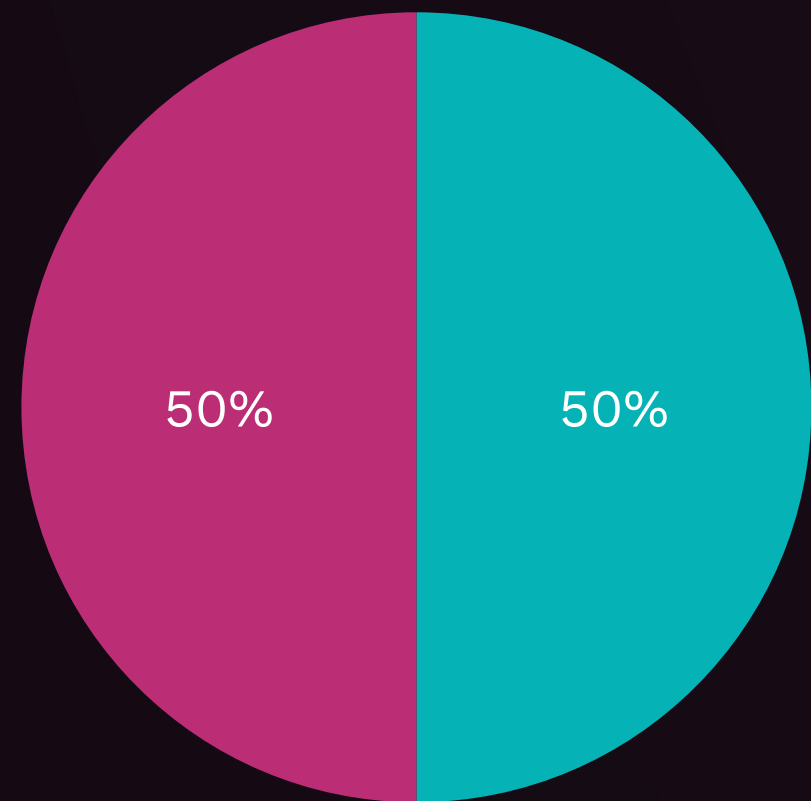
# Who are FAST viewers?

FAST viewers are younger and more diverse



## Age

58% of regular FAST viewers are aged between 18-44.<sup>1</sup> Per the US Census, 46%<sup>2</sup> of adults fall in this age range, so FAST's audience skews younger than average.



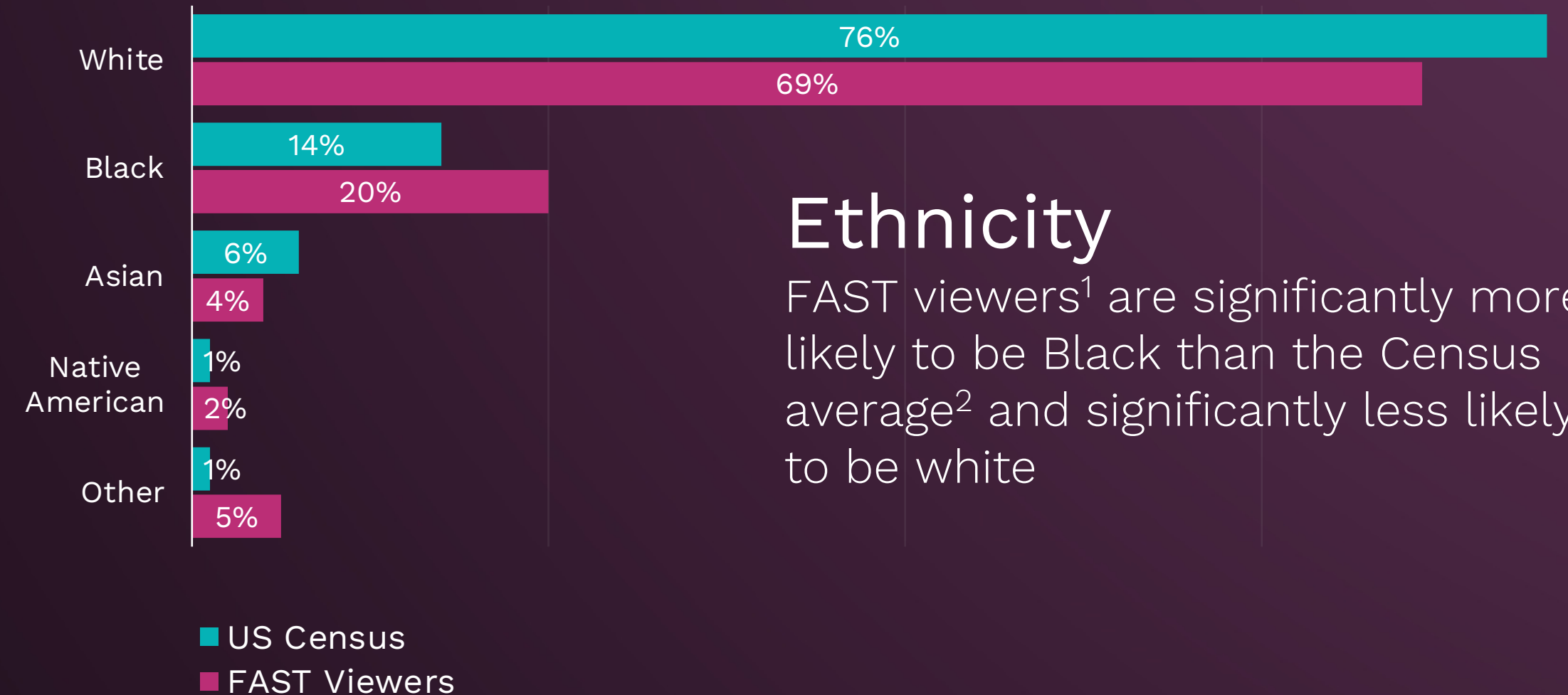
## Gender

Half of FAST viewers are male and half female<sup>1</sup>.

# 23%

## Hispanic/Latino origin

23% of regular FAST viewers identify as having Hispanic or Latino origins,<sup>1</sup> greater than the 19% of Americans who are Hispanic/Latino per the US Census<sup>2</sup>

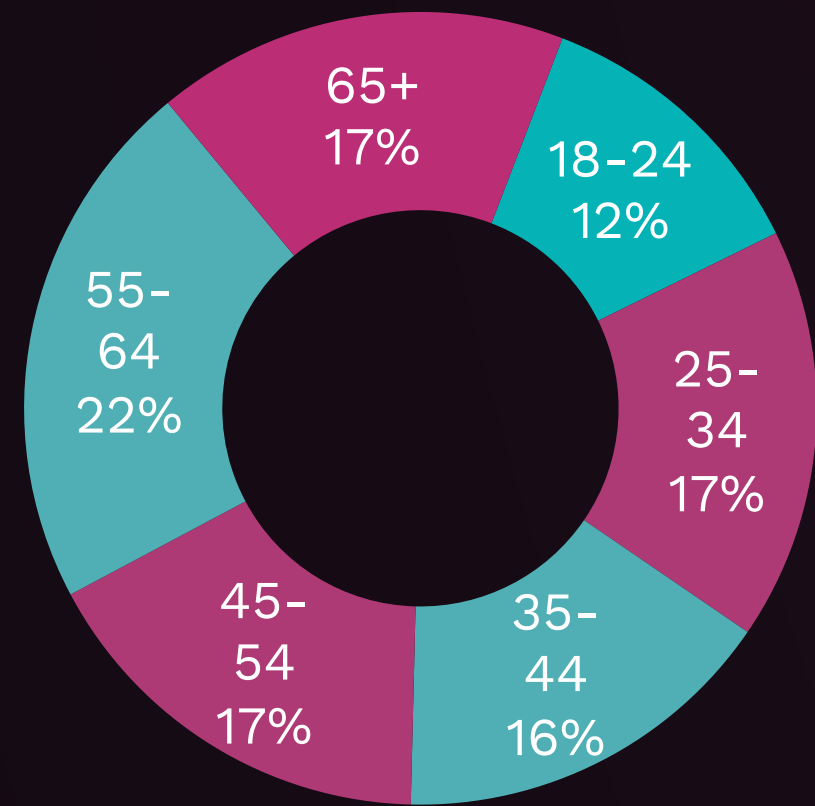


## Ethnicity

FAST viewers<sup>1</sup> are significantly more likely to be Black than the Census average<sup>2</sup> and significantly less likely to be white

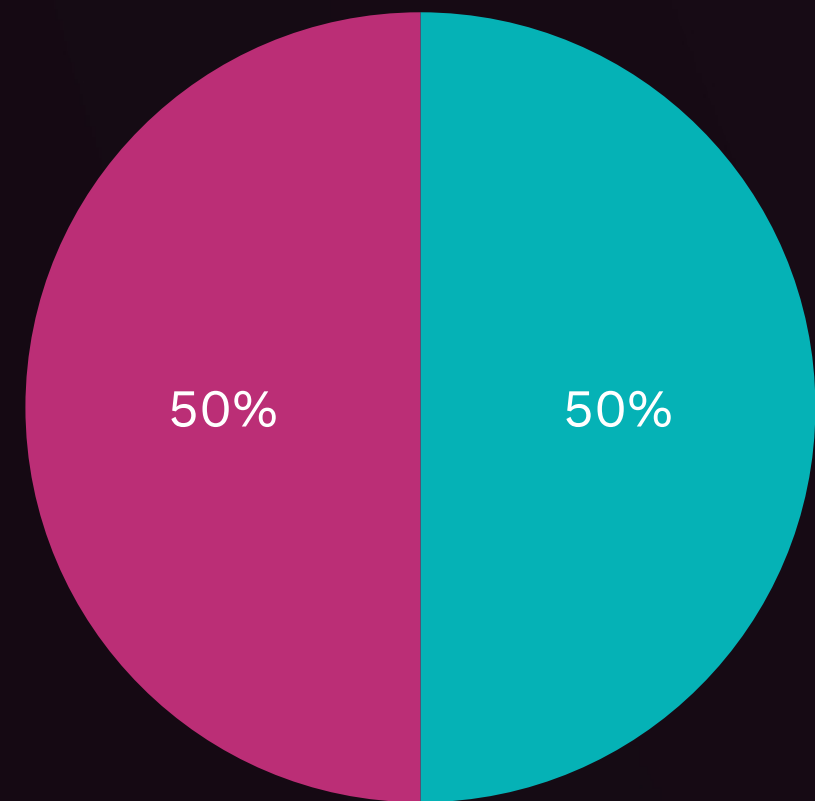
# Who are the TV viewers?

In contrast, TV viewers trend closer to the Census average<sup>2</sup> across key demographics.



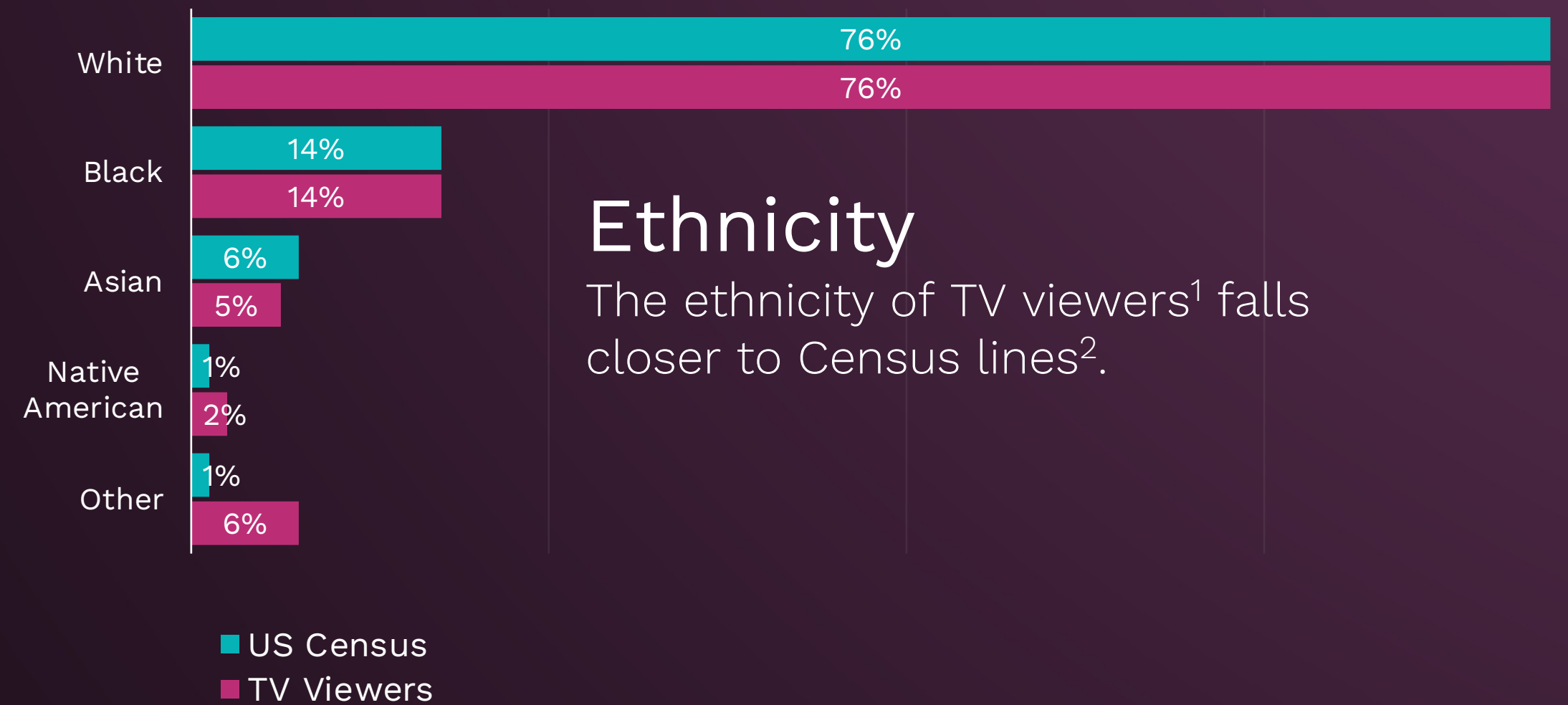
## Age

44% of TV viewers are aged between 18-44,<sup>1</sup> which is much more in line with the Census figure of 46% of all adults in this age range<sup>2</sup>.



## Gender

Half of TV viewers are male and half female<sup>1</sup>



## Ethnicity

The ethnicity of TV viewers<sup>1</sup> falls closer to Census lines<sup>2</sup>.

17%

## Hispanic/Latino origin

TV viewers are less likely than FAST viewers to identify as having Hispanic or Latino origins<sup>1</sup> but are in line with the Census average of 19%<sup>2</sup>.

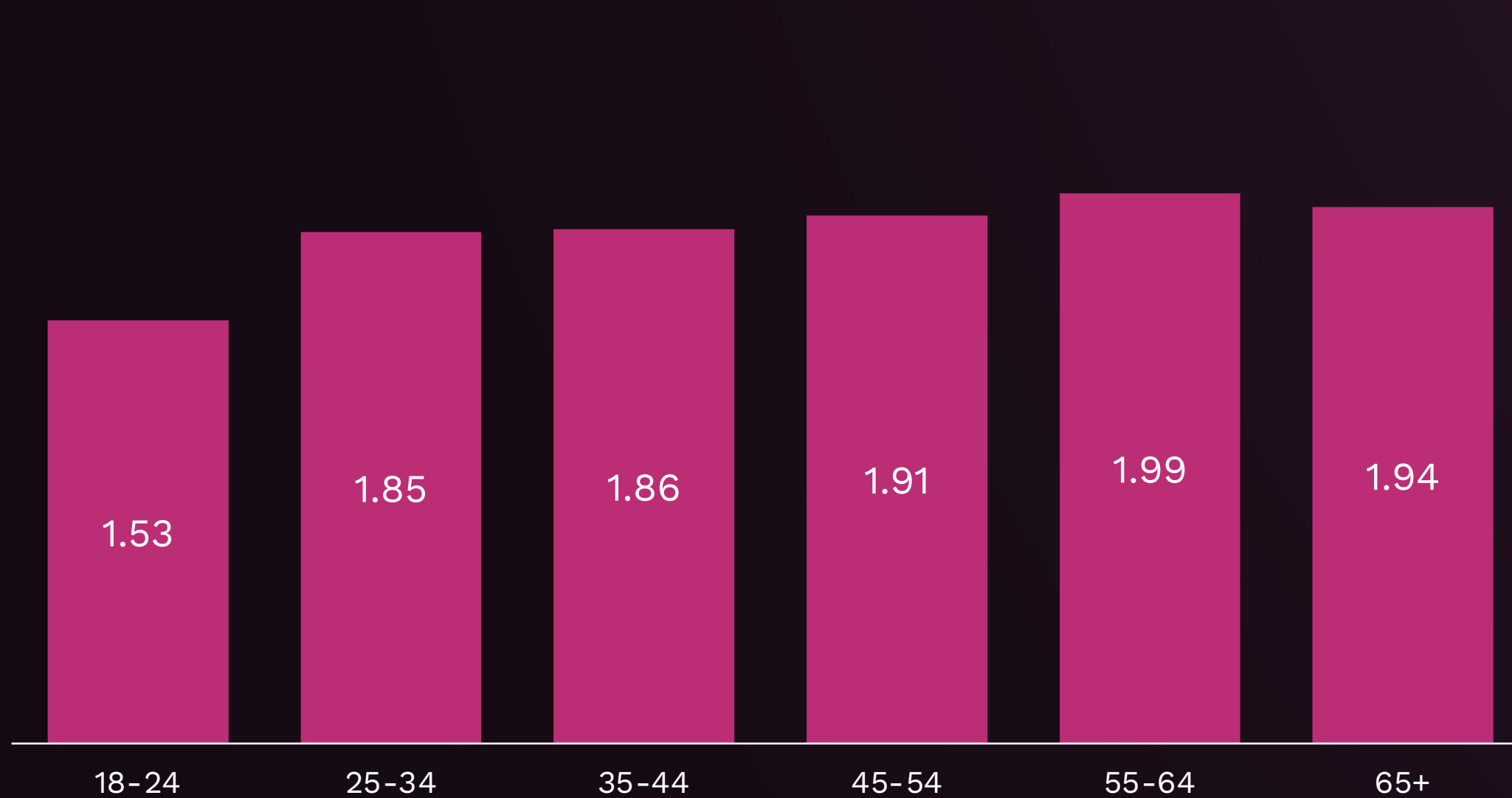


# Number of FAST apps used by age and ethnicity

FAST users tend to use more than one service, with 18-24 year olds using less than other age groups<sup>1</sup>

## Average number of services used by age

Most age groups use an average of 1.9-2.0 FAST services. The exception are 18-24s whose 1.5 services is significantly lower than all other age groups.<sup>1</sup>



## Average number of services used by ethnicity

There are no real differences in the number of FAST services used by ethnicity, with close to 2 an average for all groups.<sup>1</sup>



# 03

How FAST fits into  
the media landscape

# Regular FAST viewing by cord status

When assessing who is watching FAST by cord status, we find that regular FAST viewing is on the cusp of being mainstream among pay TV subscribers and cord cutters, but that only 1 in 3 cord nevers regularly watch FAST.

47%

Of MVPD or VMVPD subscribers say they regularly watch FAST<sup>1</sup>

46%

Of cord cutters also watch FAST<sup>1</sup>

35%

Of cord nevers are FAST viewers<sup>1</sup>

# FAST overlap with media formats

When looking at what other media formats FAST viewers use, there is strong overlap with TV viewers, with close to three-quarters of FAST viewers saying they watch broadcast or cable TV.

Not all FAST viewers use an SVOD service, which is important to note as more SVOD subscribers take ad-supported options: FAST as part of the marketing mix will maximize audience reach.

72%

Of FAST viewers also watch cable or broadcast TV<sup>1</sup>

86%

Of FAST viewers also subscribe to at least one SVOD service<sup>1</sup>

43%

Of FAST viewers don't watch AVOD on free streaming services<sup>1</sup>

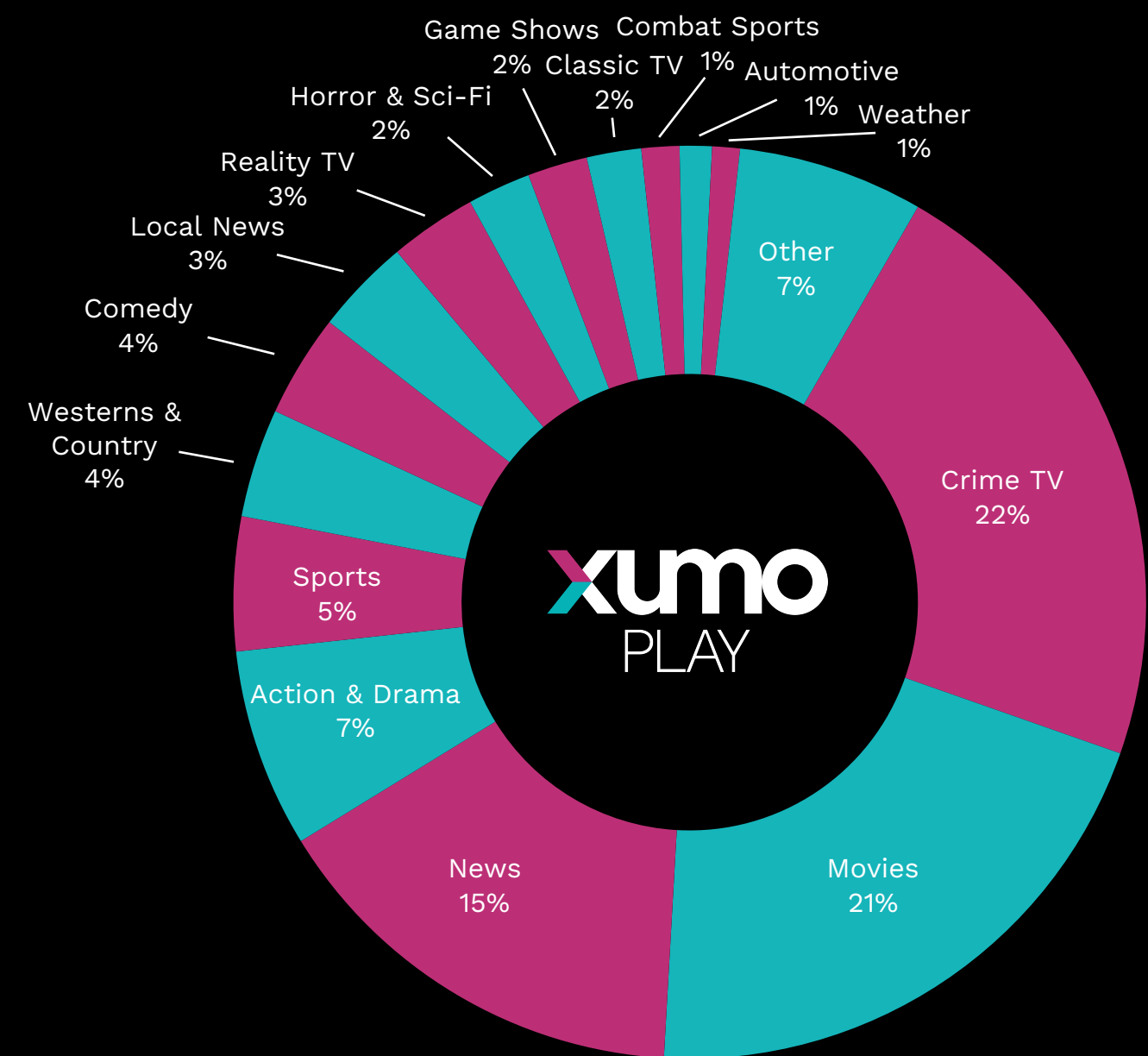
# 04

What are FAST viewers watching?

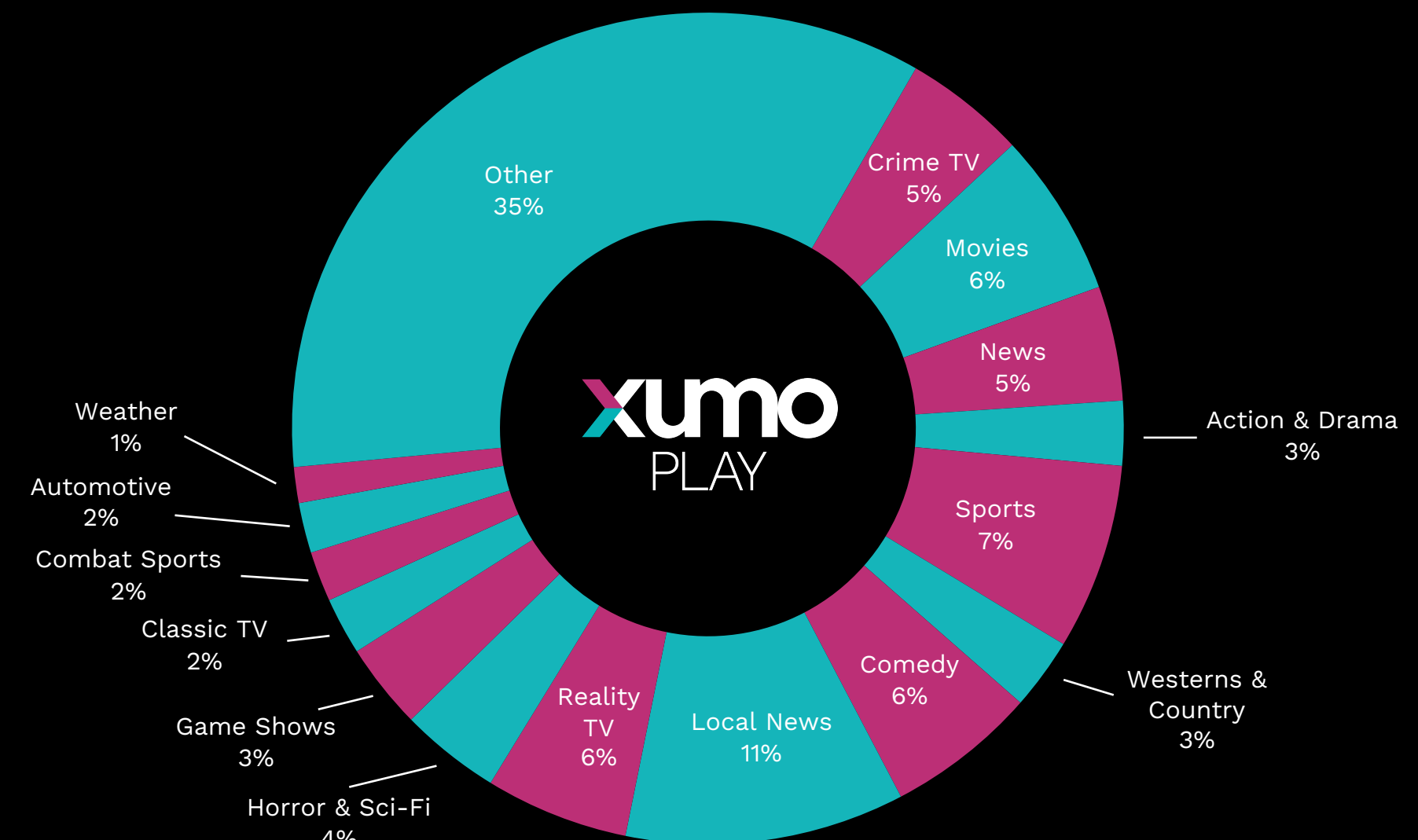
# What audiences are watching on FAST

Consumers are watching a variety of content, genres and channels via FAST, but news, movies and crime TV take the biggest share when it comes to hours watched

## Viewership data by genre<sup>1</sup>



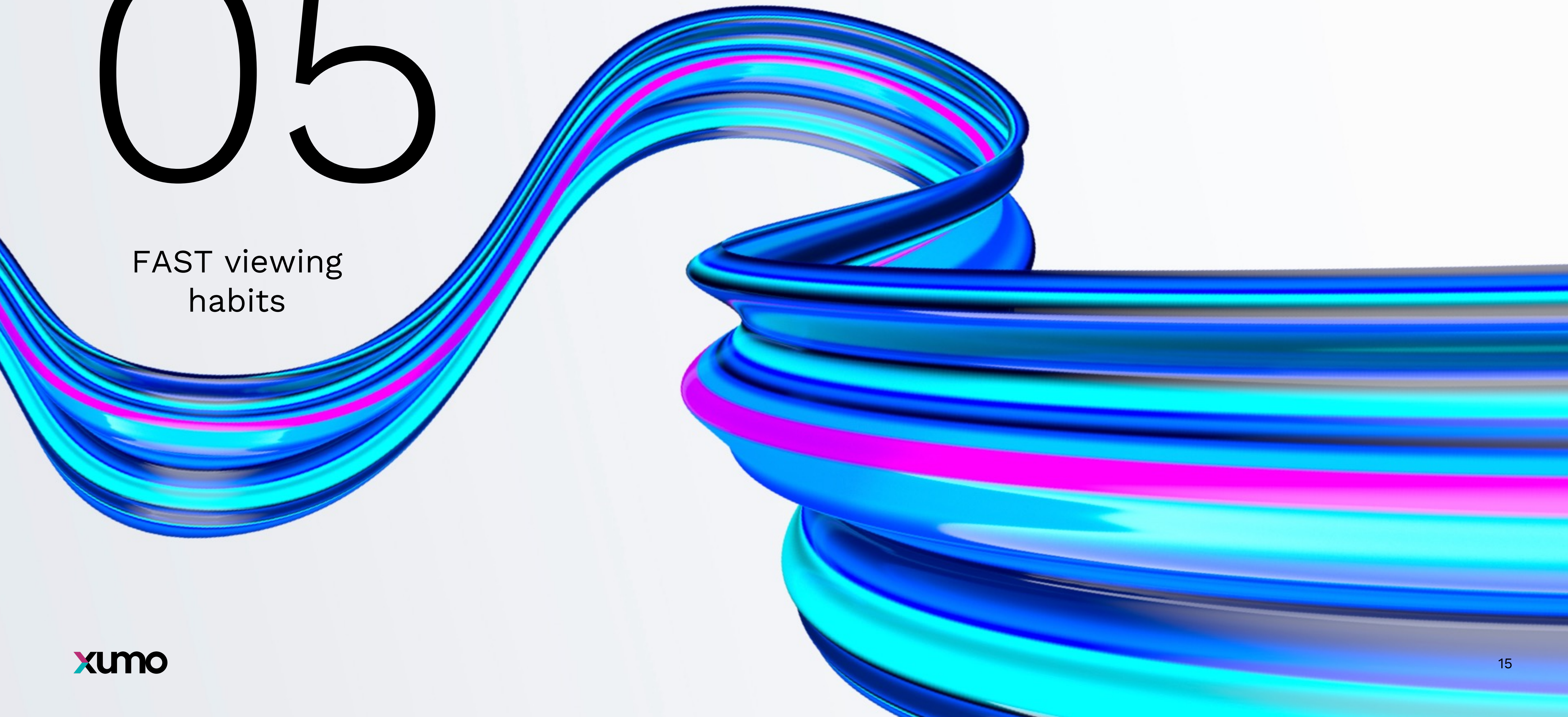
## Total channels by genre<sup>2</sup>



Note: "Other" includes faith & family, nature & wildlife, Latino, food, travel & life, home & design, kids, music, history & learning, international, and pop culture

# 05

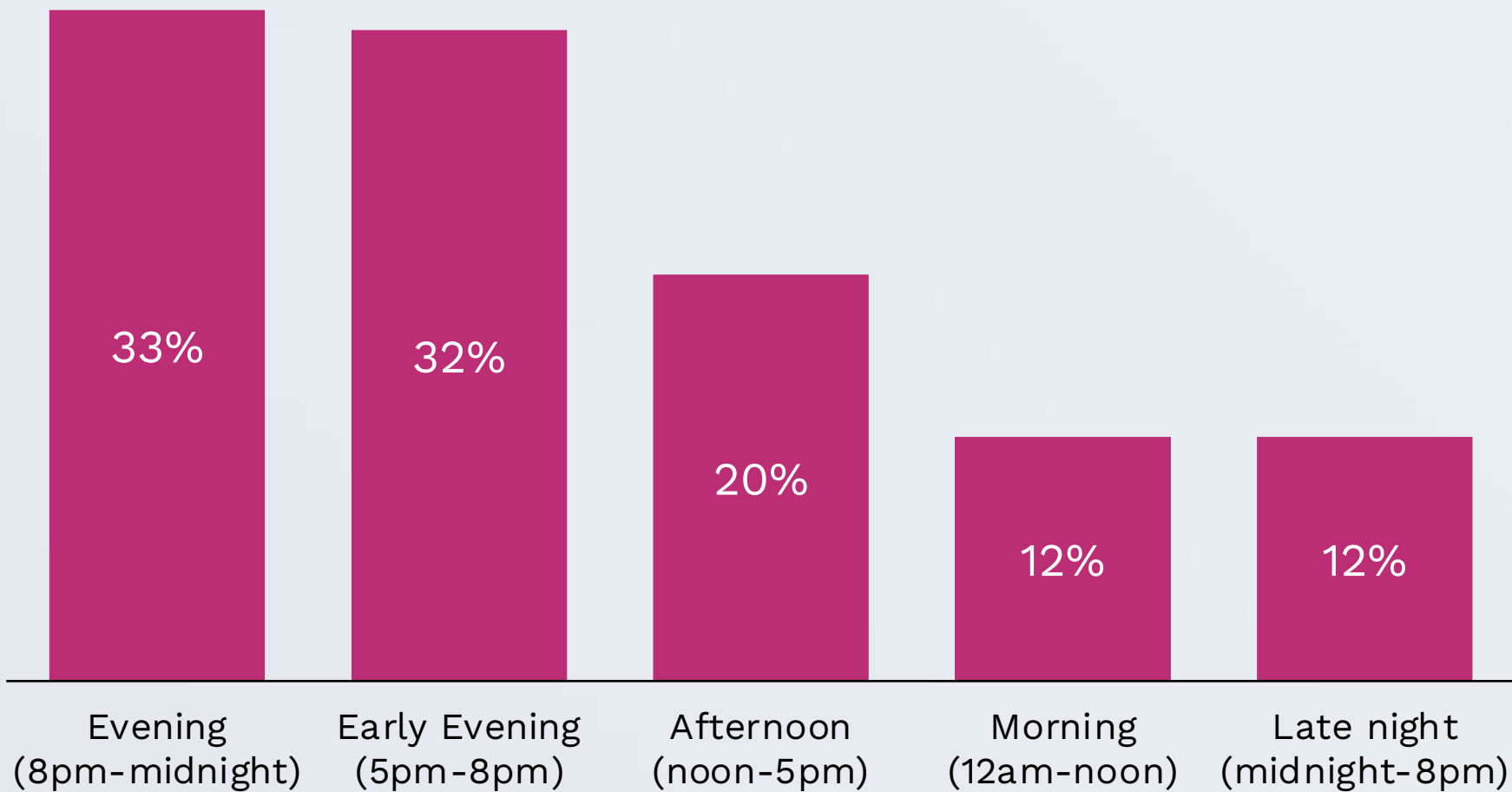
FAST viewing  
habits



# When FAST is viewed

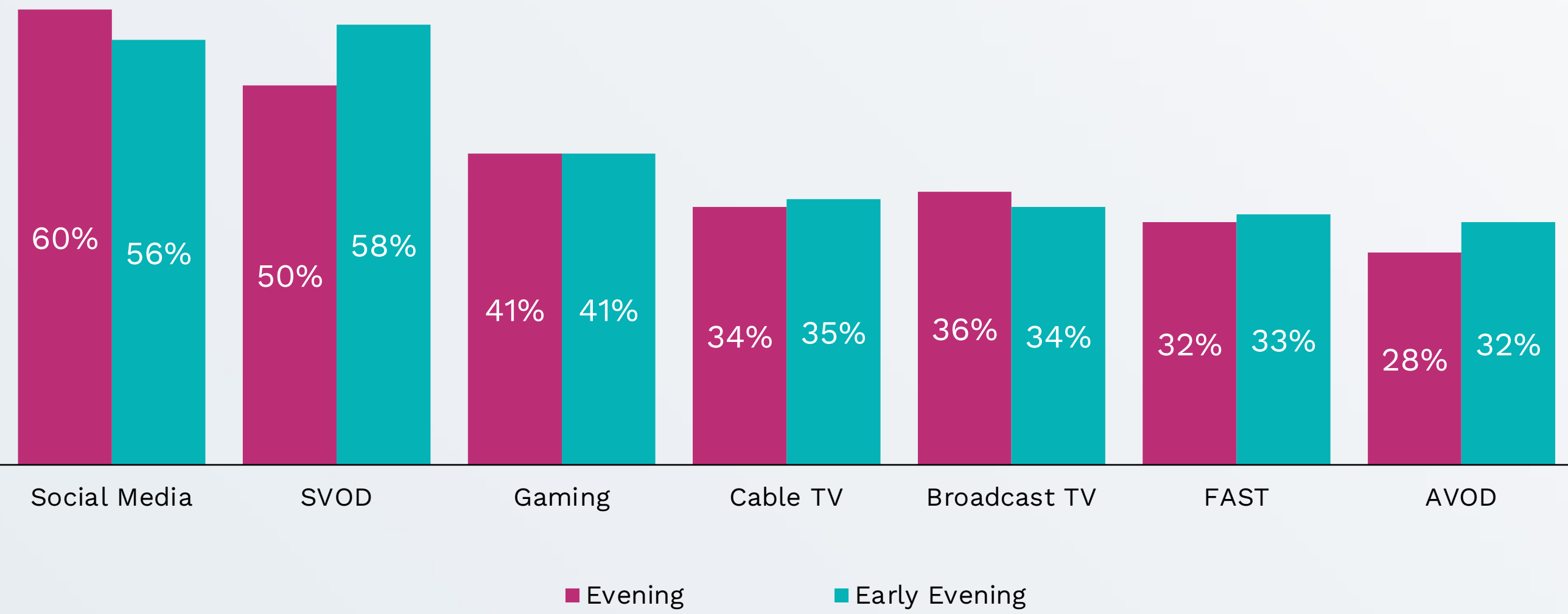
## Time of day when FAST is watched

FAST viewership is strongest in the evenings, where a third of adult Americans<sup>1</sup> say that they regularly watch a free streaming channel at some point.



## How FAST Viewing in Evenings Compares to Other Entertainment Formats

Bearing in mind that this metric represents total sampling of regular use and not volume of viewing, it is still interesting to see FAST levels close to those of cable and broadcast TV.<sup>1</sup>

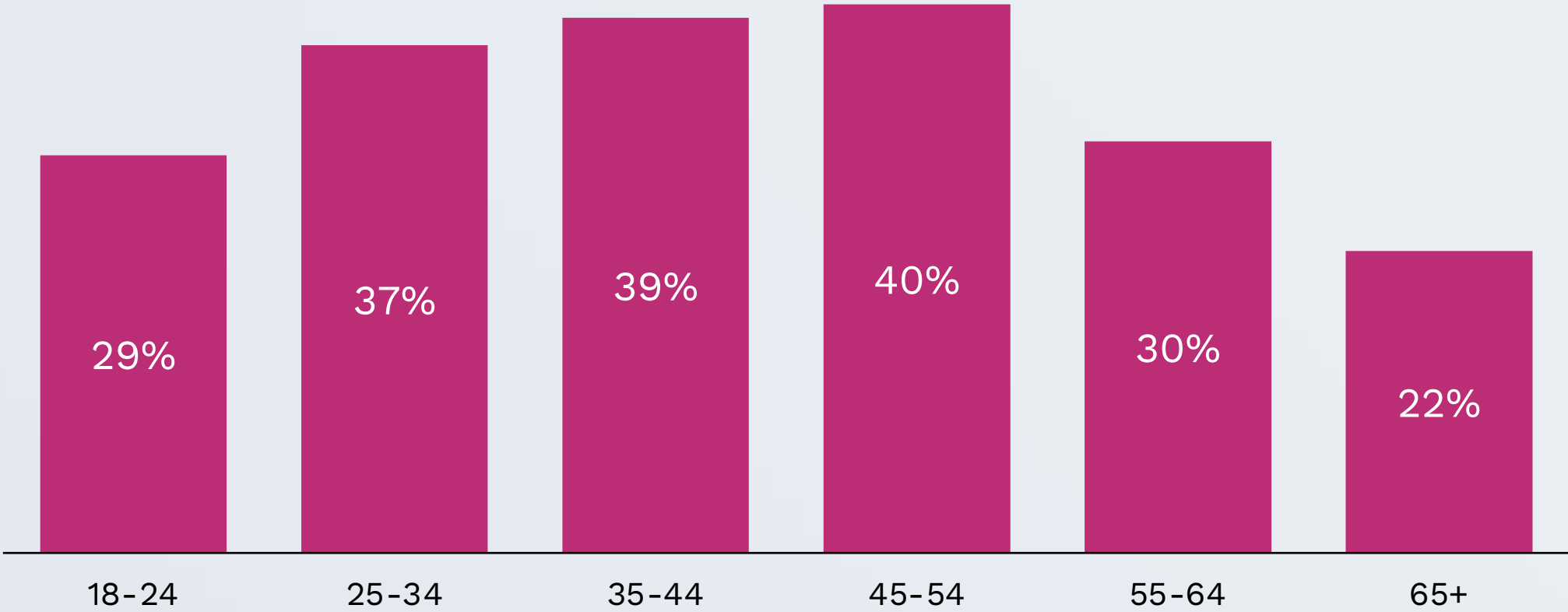




# Who is watching FAST in the evening?

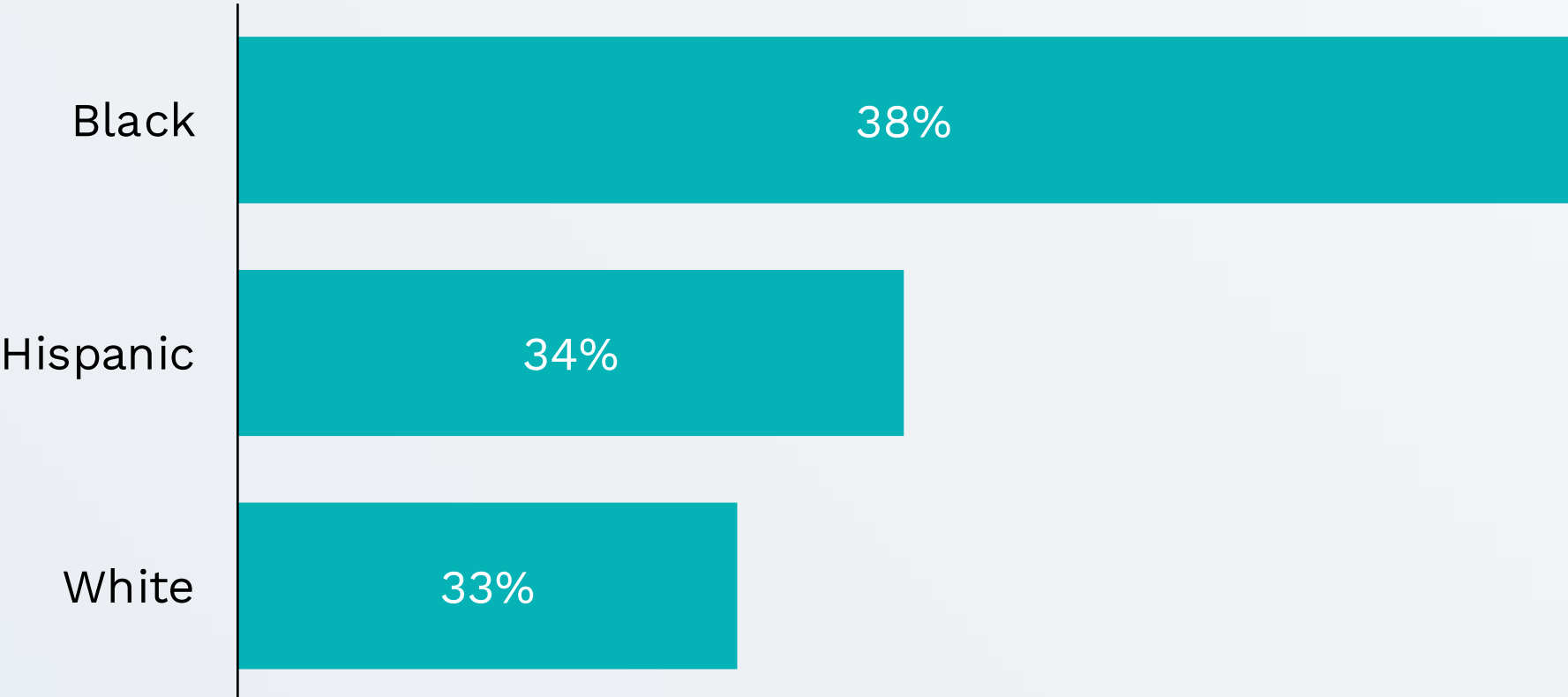
## Evening (8pm-midnight) FAST regular viewership by age

Survey respondents were asked to select media formats they “regularly” viewed or used and were then asked what time of day they watched them. The age groups most commonly using FAST in the evening range between 25 and 54.<sup>1</sup>



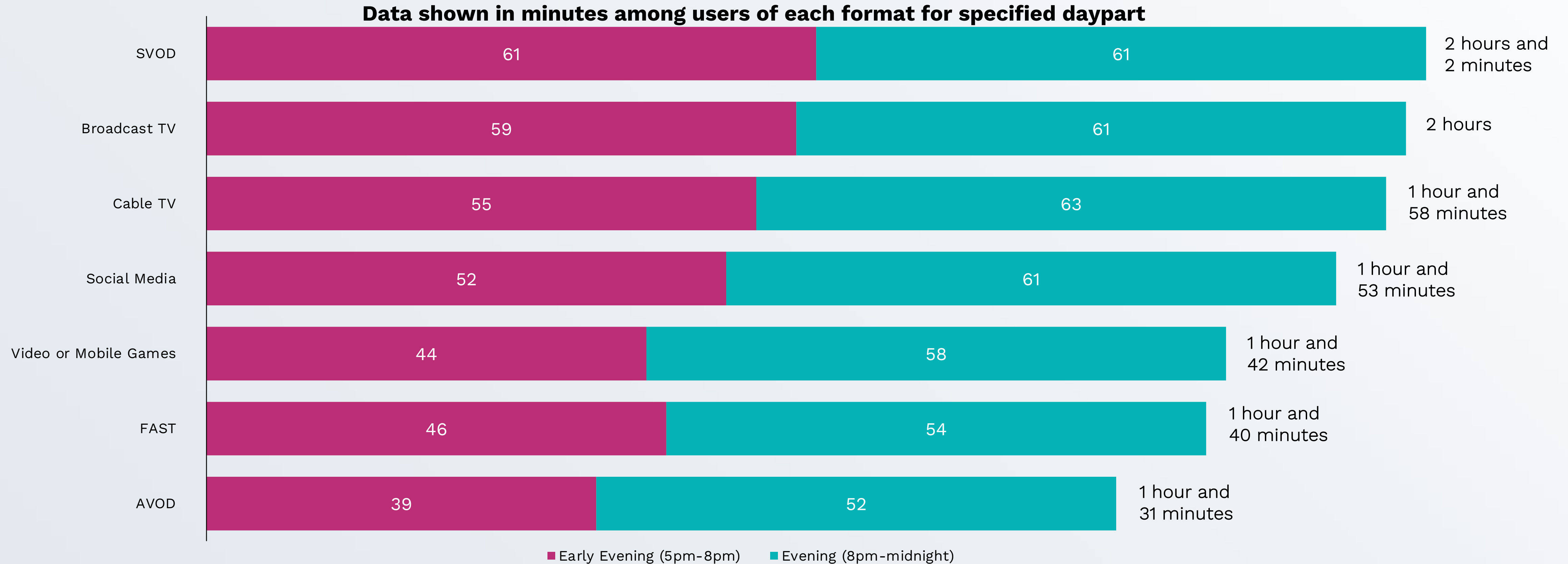
## Evening FAST regular viewership by ethnicity

Black adults are significantly more likely than White or Hispanic audiences to say they watch FAST in the evening.<sup>1</sup>



# Evening time spent with media entertainment formats

Total time spent watching FAST in the early evening<sup>1</sup> and evening<sup>2</sup> equates to 1 hour and 40 minutes per viewer.

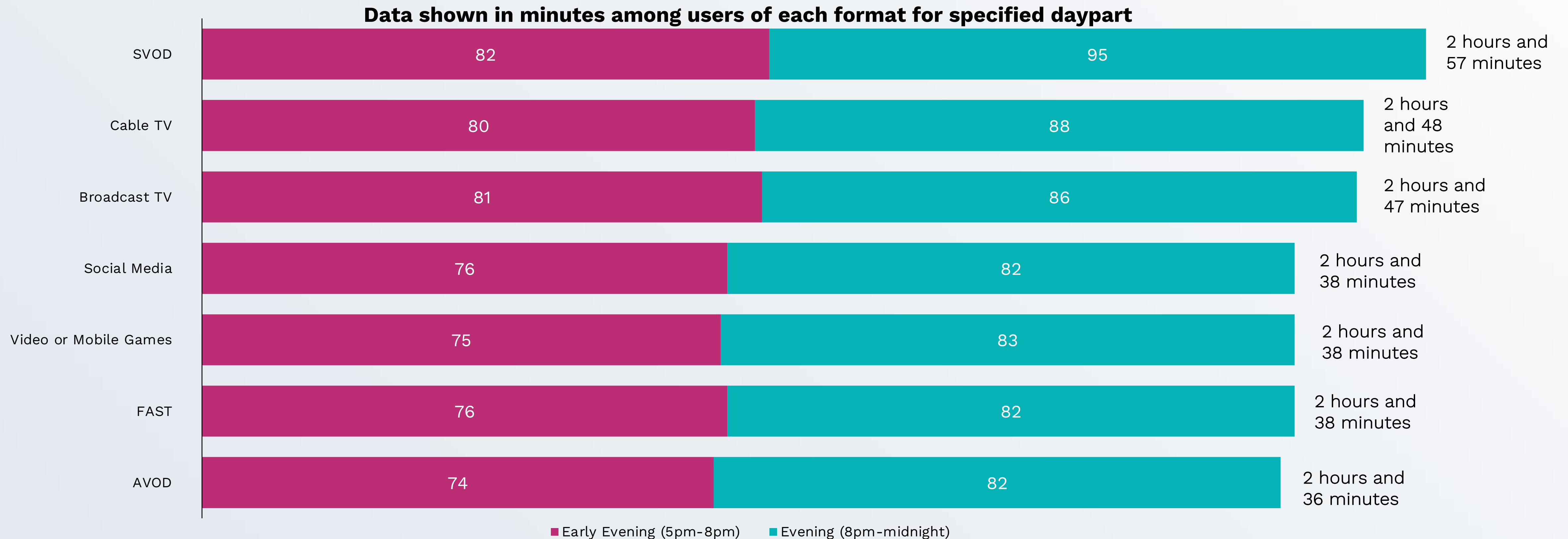


Source: 1. Xumo & FASTMaster/CRG Global "FAST Landscape Study" (US adults 18+ using media formats between 5pm-8pm: Broadcast TV = 1,049; Cable TV n=926; SVOD = 1,497; AVOD = 578; FAST = 769; Social Media = 1,642; Video/mobile games = 951)

Source: 2. Xumo & FASTMaster/CRG Global "FAST Landscape Study" (US adults 18+ using media formats between 8pm-midnight: Broadcast TV = 1,340; Cable TV n=1,404; SVOD = 2,314; AVOD = 1,298; FAST = 1,329; Social Media = 2,237; Video/mobile games = 1,648)

# Evening time spent with different media formats (among medium to heavy users)

When looking at medium to heavy users, using for an hour or more, time spent watching FAST between 8pm and midnight is equal to time spent on social media<sup>2</sup> with users watching for over an hour and 20 minutes on average.



Source: 1. Xumo & FASTMaster/CRG Global “FAST Landscape Study” (US adults 18+ using media formats between 5pm-8pm for one hour or more: Broadcast TV = 1,049; Cable TV n=926; SVOD = 1,497; AVOD = 578; FAST = 769; Social Media = 1,642; Video/mobile games = 951)

Source: 2. Xumo & FASTMaster/CRG Global “FAST Landscape Study” (US adults 18+ using media formats between 8pm-midnight for one hour or more: Broadcast TV = 951; Cable TV n=1,012; SVOD = 1,886; AVOD = 819; FAST = 903; Social Media = 1,664; Video/mobile games = 1,142)

# 06

What FAST viewers  
think about FAST

# Viewers are embracing FAST

69% I can always find something to watch on free streaming channels.<sup>1</sup>

67% Free streaming channels keep me entertained.<sup>1</sup>

55% Free streaming channels are one of my favorite entertainment sources.<sup>1</sup>

53% Free streaming channels offer high quality content.<sup>1</sup>

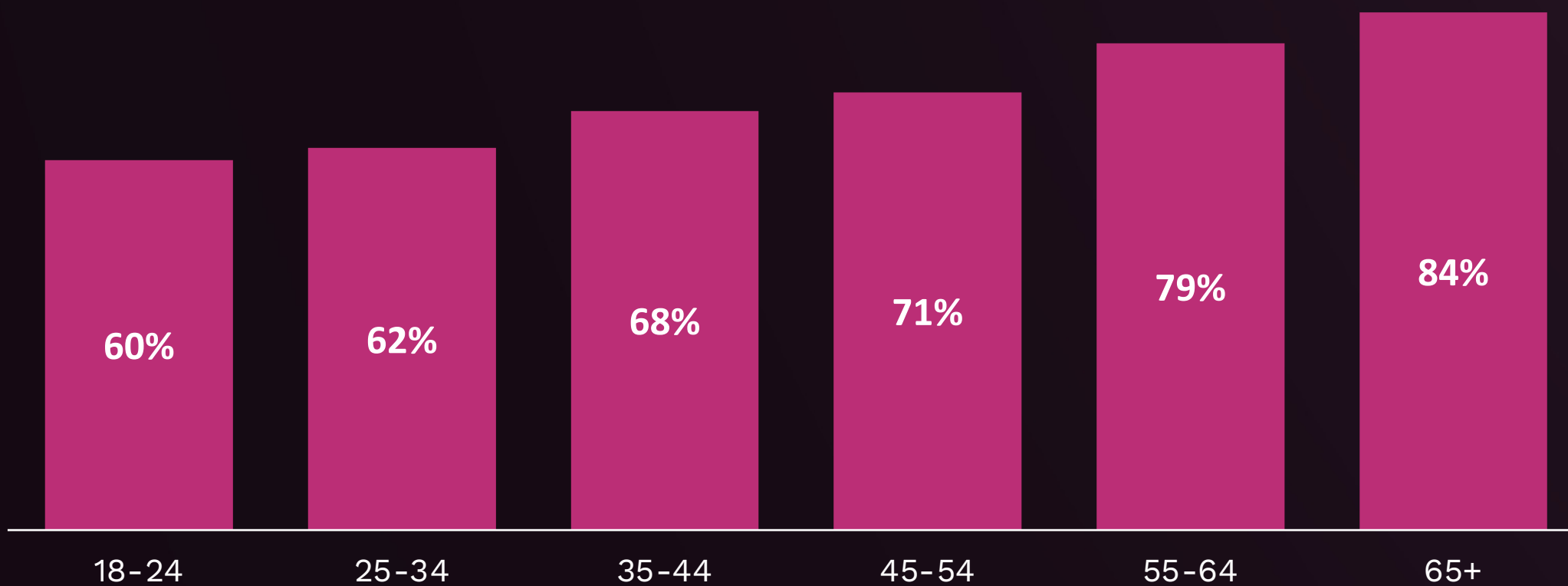
43% If I could only watch free streaming channels, I'd be fine.<sup>1</sup>

# Entertainment ratings for media formats

Younger FAST viewers are less likely than older viewers<sup>1</sup> to say they can always find something to watch on FAST, or to agree that FAST channels offer high quality content.<sup>1</sup> Currently, most available content on FAST is not geared to younger viewers, explaining these perceptions. However, 2H 2023 saw an increase in channels from digital creators, whose programming resonates with a younger demographic, so these sentiments might change.

## “I can always find something to watch on FAST”

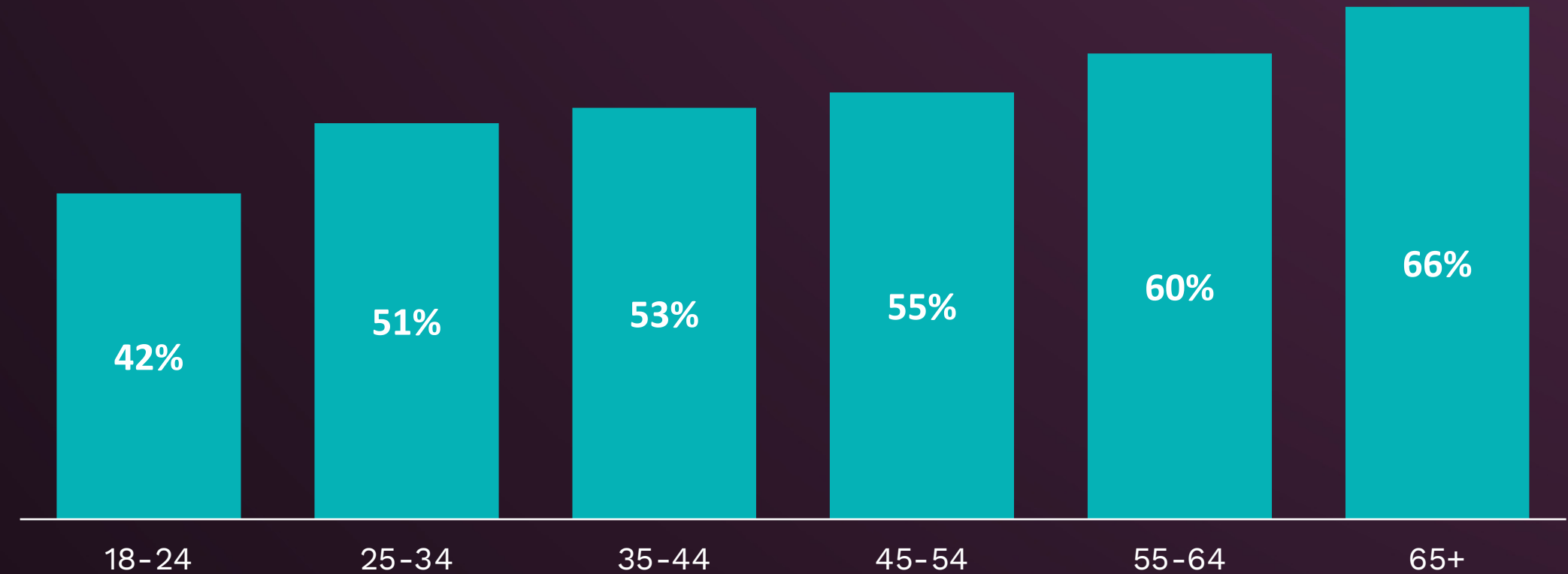
A majority off all ages agree, but sentiment grows stronger with age<sup>1</sup>:



When asked if the content on FAST is mostly repeats, 34% of 18-24s agreed<sup>1</sup>. Other ages: 37% 25-34, 34% 35-44, 25% 45-54, 25% 55-64, 35% 65+.

## “FAST channels offer high quality content”

Younger views are less likely to agree given the lack of content available which targets them<sup>1</sup>:



Despite this, younger FAST viewers are most likely to say they'd unsubscribe from an SVOD service due to what's on FAST<sup>1</sup>: 31% 18-24, 32% 25-34, 23% 35-44, 21% 45-54, 18% 55-64, 21% 65+

# Key takeaways

- FAST's audience is increasingly choosing to watch FAST over other forms of entertainment.
- FAST viewers are younger and more diverse than the general population, in contrast to TV viewers who skew closer to the national average.
- Most FAST viewers have pay TV service (with just under half of these saying they regularly watch at least one FAST service).
- FAST viewers don't exist in a content bubble. Nearly three-quarters say they watch broadcast or cable TV, and almost 9 in 10 have an SVOD service.
- More consumers are turning to FAST as a primary means of entertainment. FAST viewing peaks in the evening, and engagement levels, such as time spent watching, follows similar patterns as other popular forms of entertainment during primetime hours.
- FAST viewers like what they see: over half of FAST users say it is one of their favorite sources of entertainment.



# Methodology & Glossary

The data in this report is from a market research project called the FAST Landscape that Xumo commissioned with FASTMaster Consulting, who in turn utilized the consumer insights firm CRG Global to field the survey.

The FAST Landscape study was designed to accurately measure the number of US consumers watching a FAST service, utilizing a distinct methodology designed by Gavin Bridge (aka the FASTMaster). This saw usage levels (defined as an open “regular usage” in the study) fall down to realistic figures, unlike many other studies which have been published.

The survey was fielded online in Q3 2023 – Q1 2024 to 4,000 U.S. adults aged 18 or older along age, gender and ethnicity proportions based on the U.S. Census.

FAST was described to consumers as “free streaming channels” and held distinct from AVOD, which was defined as “free on-demand streaming.” In this report, FAST is used to describe linear streaming channels and AVOD for free on-demand content.

<https://www.crgglobalinc.com/>



# About Xumo

Xumo, a joint venture between Comcast and Charter, was formed to develop and offer a next-generation streaming platform for the entire entertainment industry. The company is defined by three primary lines of business: Xumo devices, Xumo Play, and Xumo Enterprise.

Powered by Comcast's global technology platform, Xumo devices feature a world-class user interface that includes universal voice search capabilities making it easy for consumers to find and enjoy their favorite streaming content.

Xumo Play is a FAST service with hundreds of ad-supported linear channels and on demand options that anchors the free content offering on Xumo devices and is also available as an app on other major streaming platforms. Xumo Enterprise is the business-to-business arm of the joint venture, providing content makers, distributors and advertisers with tools and services to make free ad-supported streaming TV (FAST) more accessible.

<https://www.xumo.com/>



# About FASTMaster

FASTMaster Consulting is FAST thought leader Gavin Bridge's personal brand. Bridge has partnered with several leading FAST channel creators and FAST platforms as they seek strategic guidance and market information to maximize their FAST business.

Gavin is considered by many to be the leading strategist in FAST. He authored the Variety Intelligence Platform "Life in the FAST Lane" report series and his frequent analyses on the FAST industry were lauded as being data rich, accurate and sound in advice. In 2023, he was invited to speak at industry events across the globe in the USA, Canada, Spain, France, Korea and Australia and he was the host of the first ever "FAST & Global" summit at MIPTV.

Since leaving Variety in September 2023, Bridge has continued his analysis of the industry at his FASTMaster blog and is Vice President of Media Research at CRG Global where he designs detailed studies and overviews of the FAST market for the industry.

<https://fastmaster.substack.com/>

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