

State of CTV 2026

Your need to know around changing consumer behaviors and what it means for advertising

The need to know:

The state of streaming

- Three-quarters of all streaming minutes are ad-supported and 85% of Samsung households use at least one ad-supported streaming app
- While all viewers now stream, nearly all linear viewing is concentrated among the 22% of all TVs that are the heaviest linear viewers

The state of ghost viewing

- Subscription streaming is an ongoing content-seeking quest - viewers ghost any app that doesn't fulfill that quest
- Even the largest apps are ghosted by half as many users as are active in a given quarter

The state of smart TV ads

- The home screen provides ease of use and valuable recommendations
- Ads on FAST are as relevant as those on Subscription Streaming and less disruptive to the viewing experience
- FAST drives greater attention to ads than subscription streaming apps and vMVPDs

The state of streaming

The need to know:

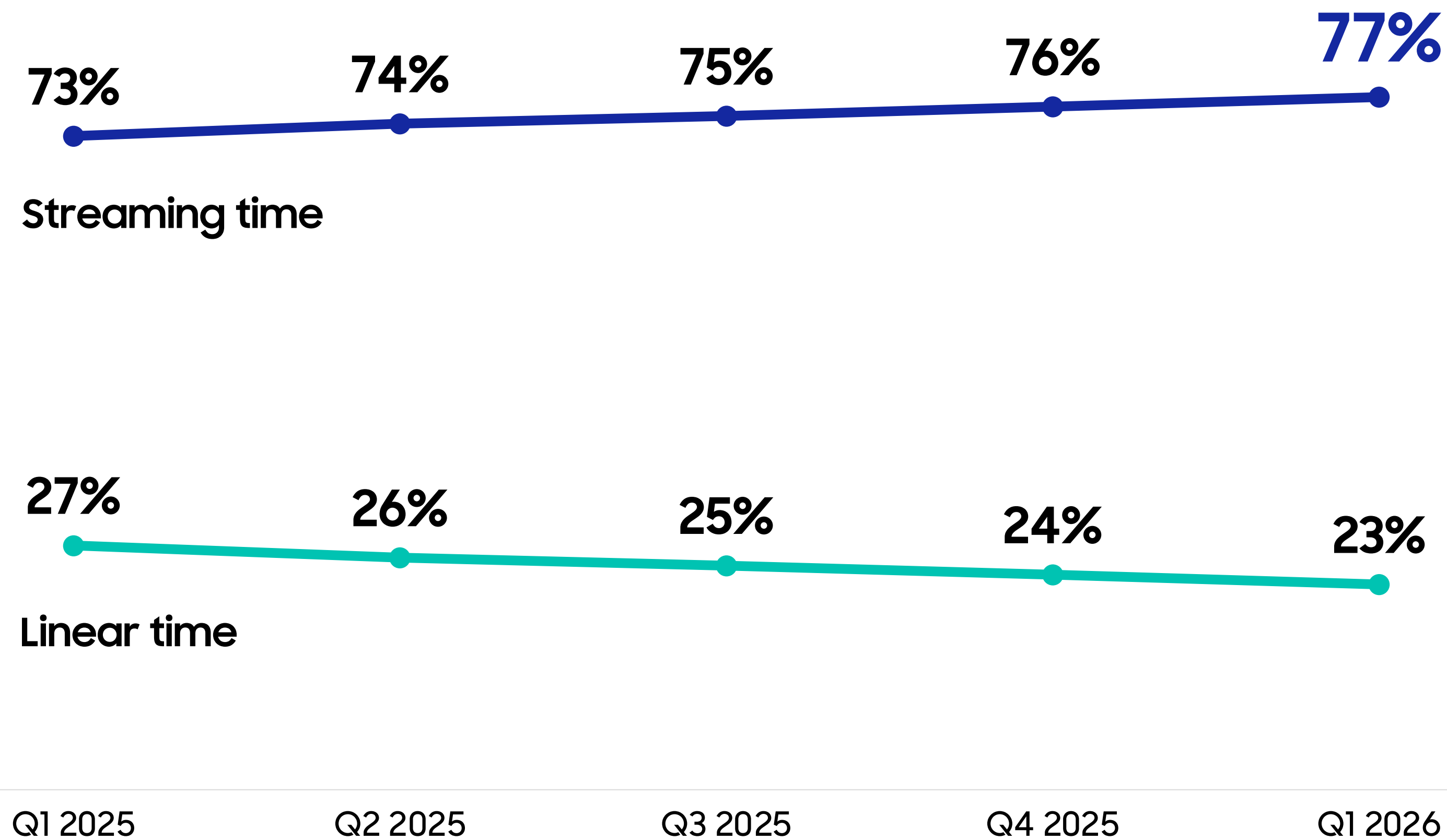


The proportion of all viewing that was streamed continued its growth through 2025 into Q1 of 2026

While all viewers now stream, nearly all linear viewing is concentrated among the 22% of all TVs that are the heaviest linear viewers

Three-quarters of all streaming minutes are ad-supported and 85% of Samsung households use at least one ad-supported streaming app. Ad-free streaming has declined 57% since Q1 2023

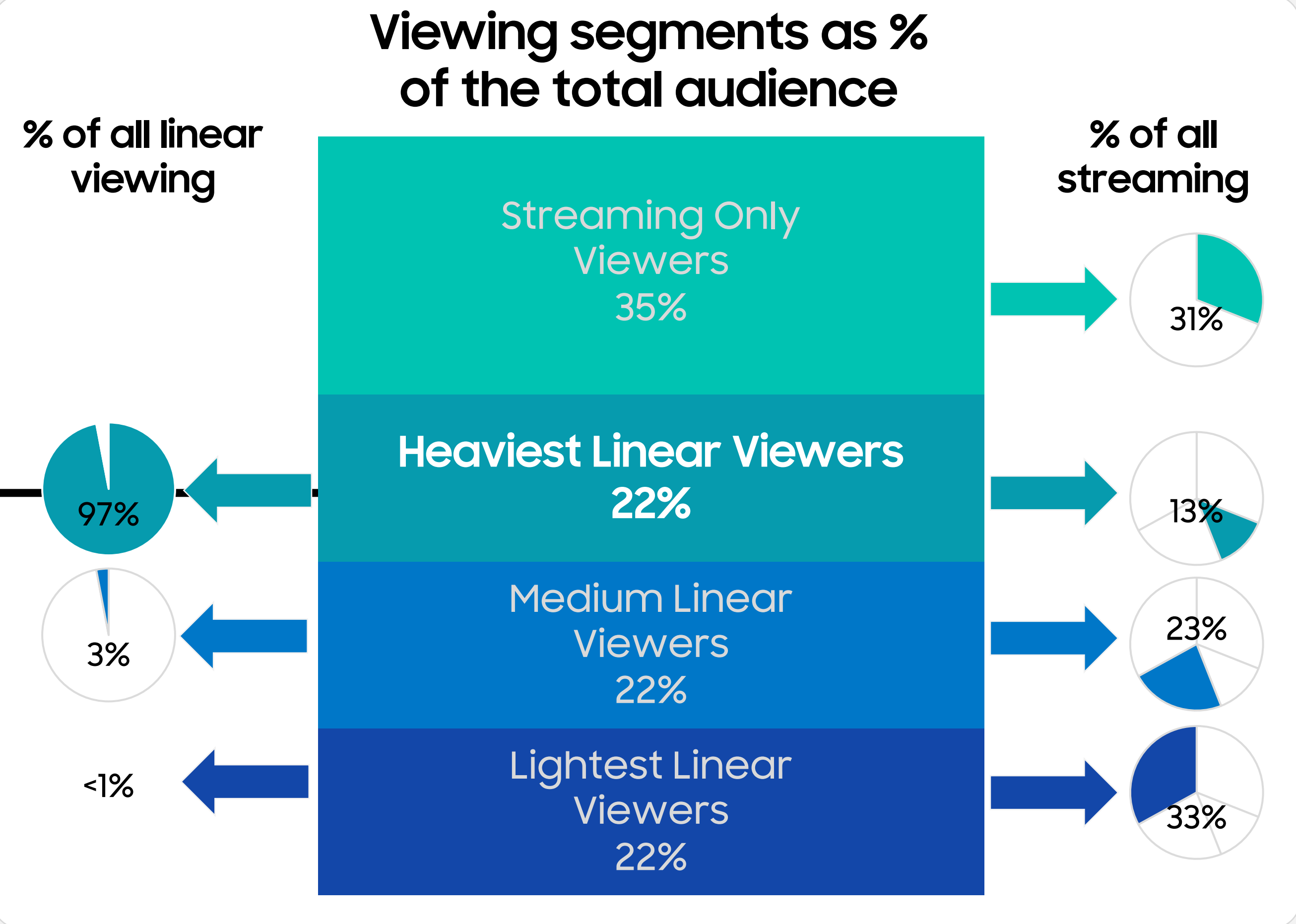
Streaming time reached a new high in Q1



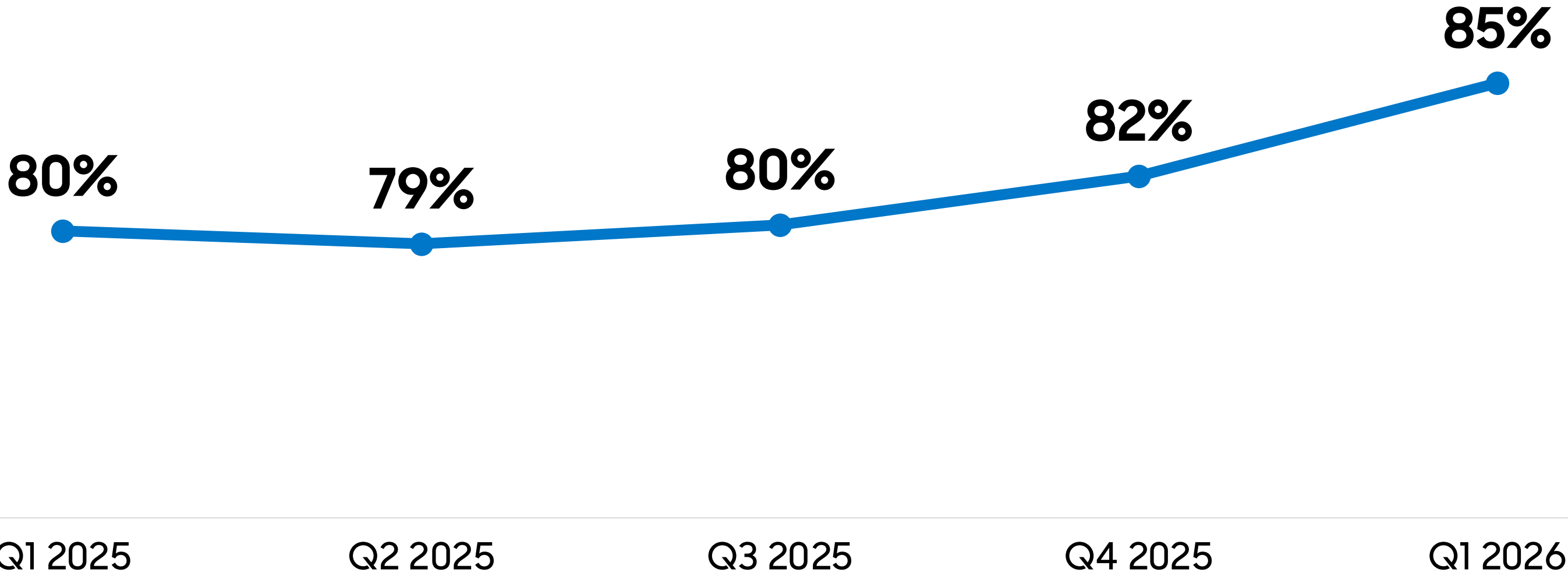
As we start 2026, streaming continues its resurgent growth in proportion of viewing time

While all viewers stream, nearly all linear viewing is done by just 22% of viewers

The heaviest linear viewers consume 97% of all linear TV minutes



The use of ad-supported apps grew significantly in Q1



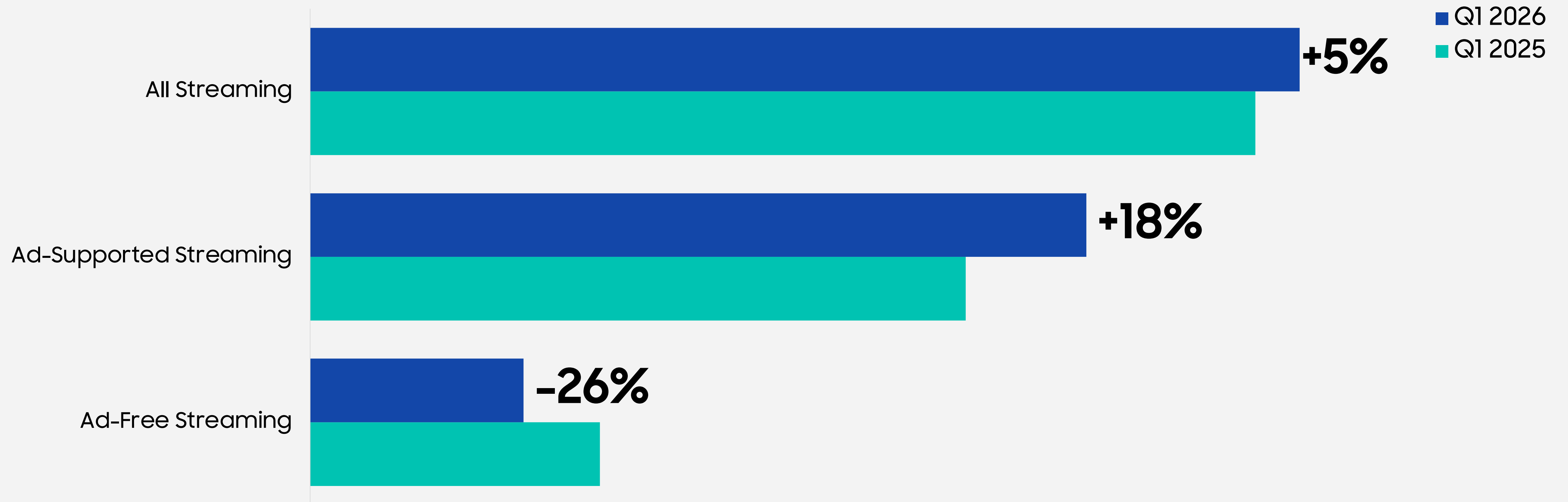
Ad-supported streaming is the norm for the large majority of Samsung HHs



Source: Samsung Proprietary ACR - Includes Active TVs in the quarter. Streaming is viewership in Smart Hub with a minimum of 1 minute of consecutive app viewership. Ad-supported includes both free and paid apps and Samsung TV Plus.

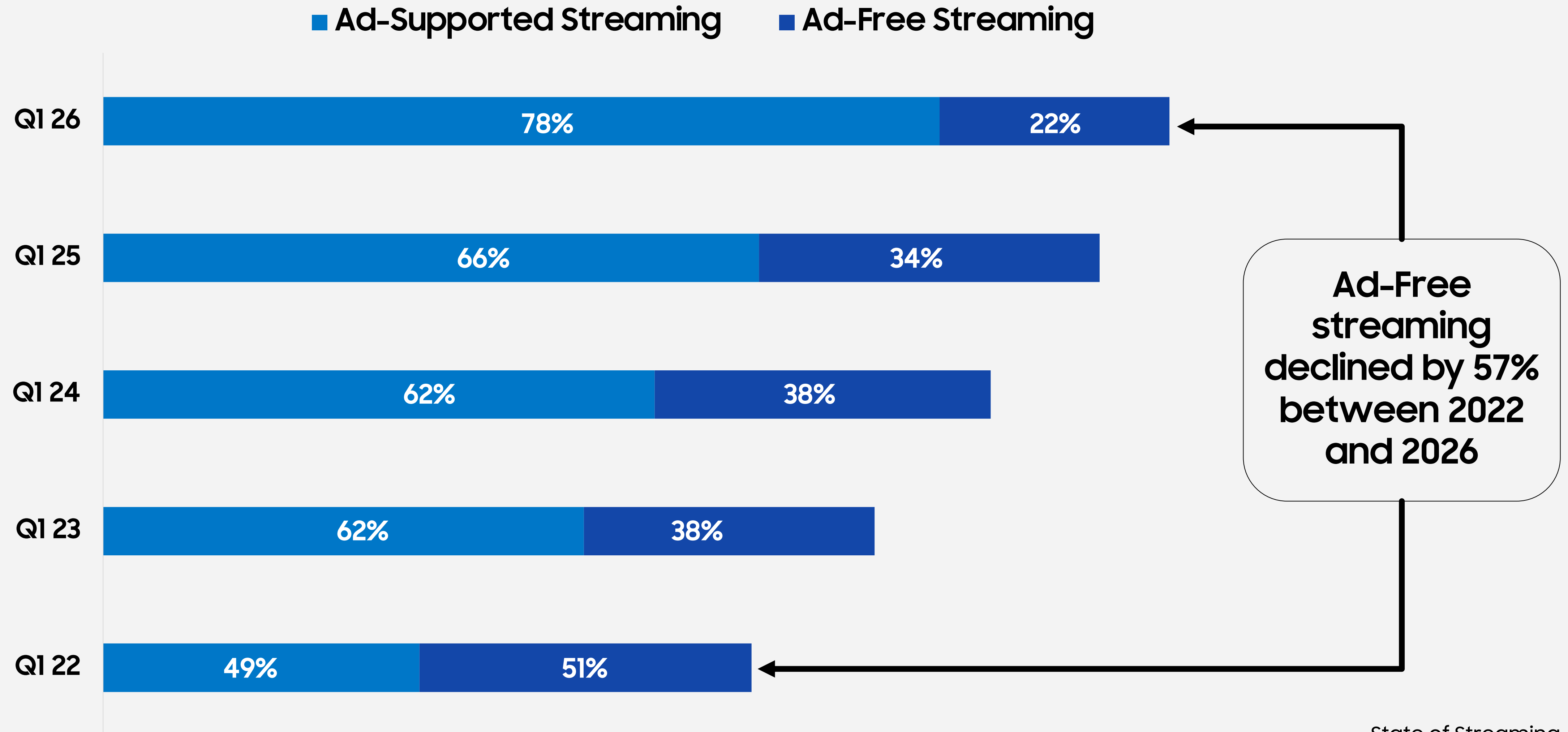
Streaming time continues to shift to ad-supported

Streaming time by app type



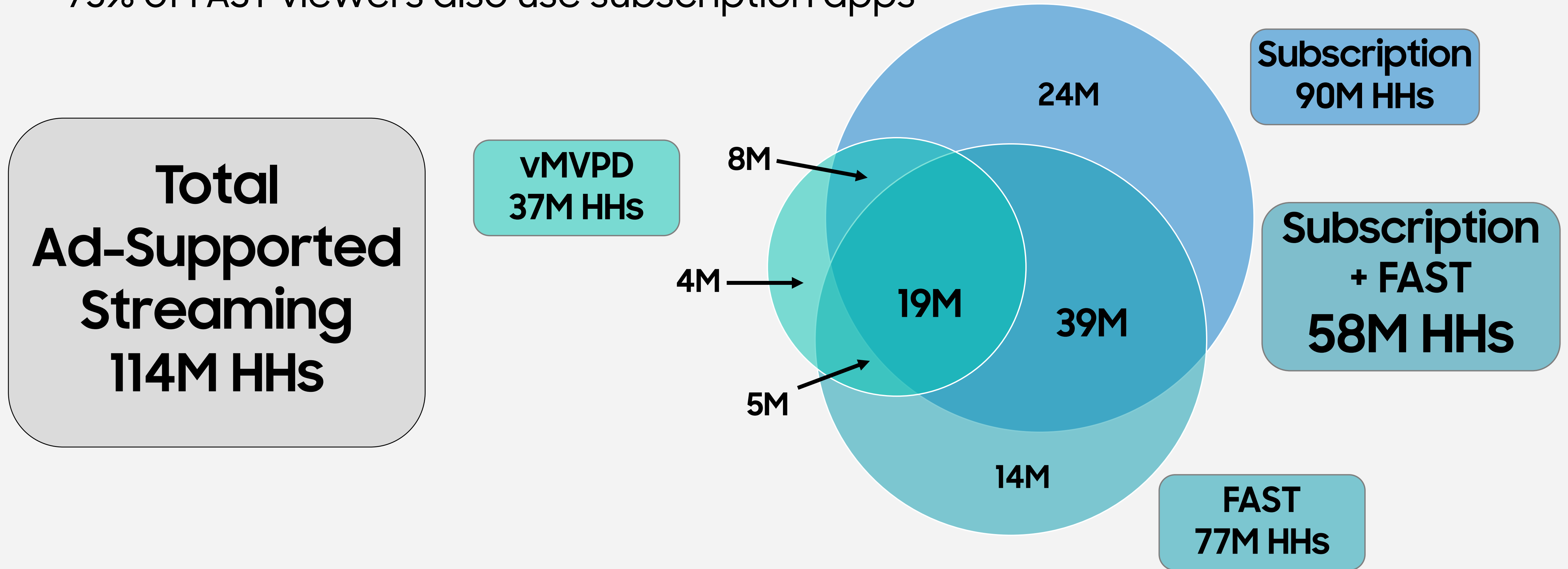
Source: Samsung Proprietary ACR – Includes Active TVs in the quarter. Streaming is viewership in Smart Hub (including Samsung TV Plus) with a minimum of 1 minute of consecutive app viewership. AVOD includes all ad-supported streaming minutes and SVOD includes all ad-free streaming minutes inclusive of hybrid apps that offer both ad-supported and ad-free tiers.

Over the past 5 years, streaming time has shifted dramatically to an ad-supported model



Ad-supported streaming is more “and” than “or”

- 64% of subscription streamers also use FAST
- 75% of FAST viewers also use subscription apps



Audience intelligence: Ghost viewers

**According to Antenna,
89% of new streaming
subscriptions are
negated by churn**

Ghost Users:

**Users of a streaming app who are:
Active in the past 12 months**

AND

**Become inactive for 4 or more
consecutive months during that time**

Even the largest apps are ghosted by half as many users as are active in a given quarter

Subscription streaming is an ongoing content-seeking quest
viewers ghost any app that doesn't fulfill that quest

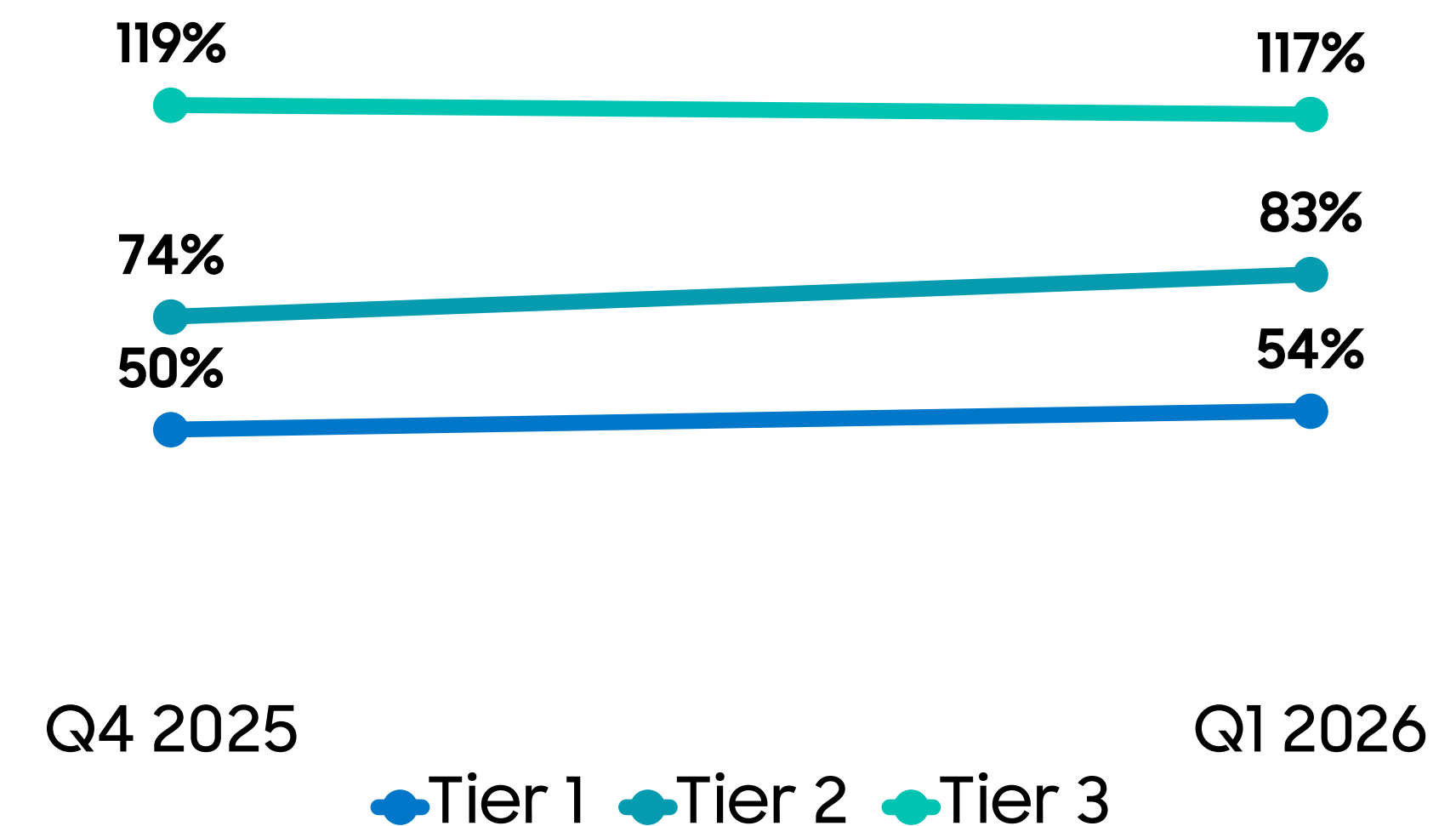
Ghost Viewership

Ghost viewers
from the last 12 months



Total active users
for the current period

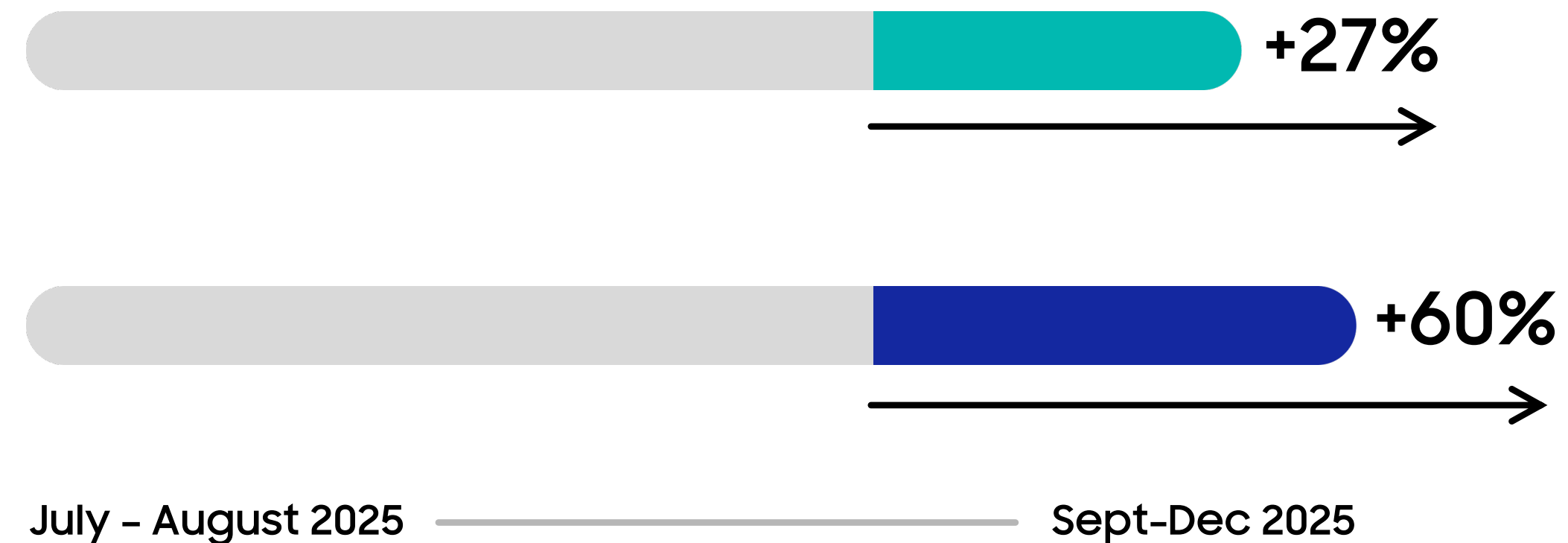
Ghost viewership ranges from 50% for the most popular apps to more than 100% of long-tail apps, where more viewers trial and ghost than become regular users



Live sports are not solving streamers' ghosting challenges

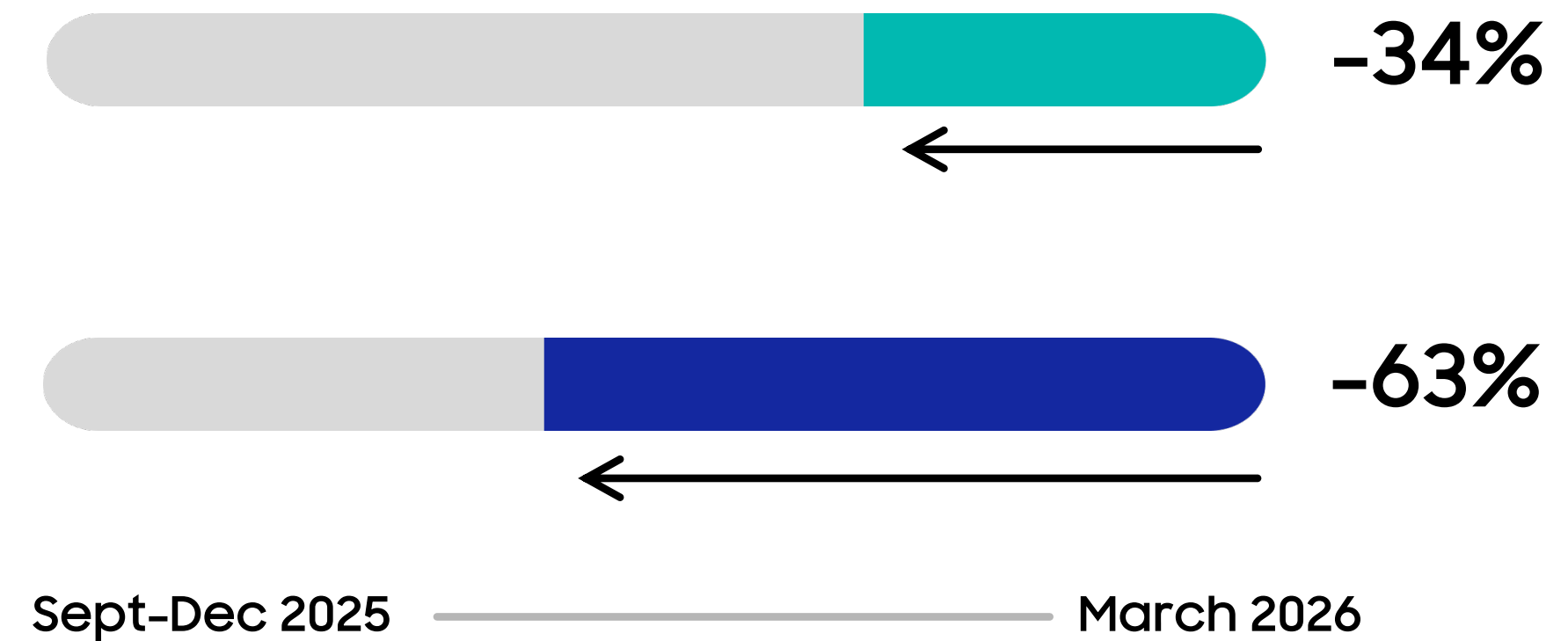
NFL-influenced audience behavior

During the NFL season, streamers that broadcast games increase reach and time spent per viewer



■ Viewers
■ Hours per Viewer per Month

But audience and engagement gains don't persist in the month after the Super Bowl

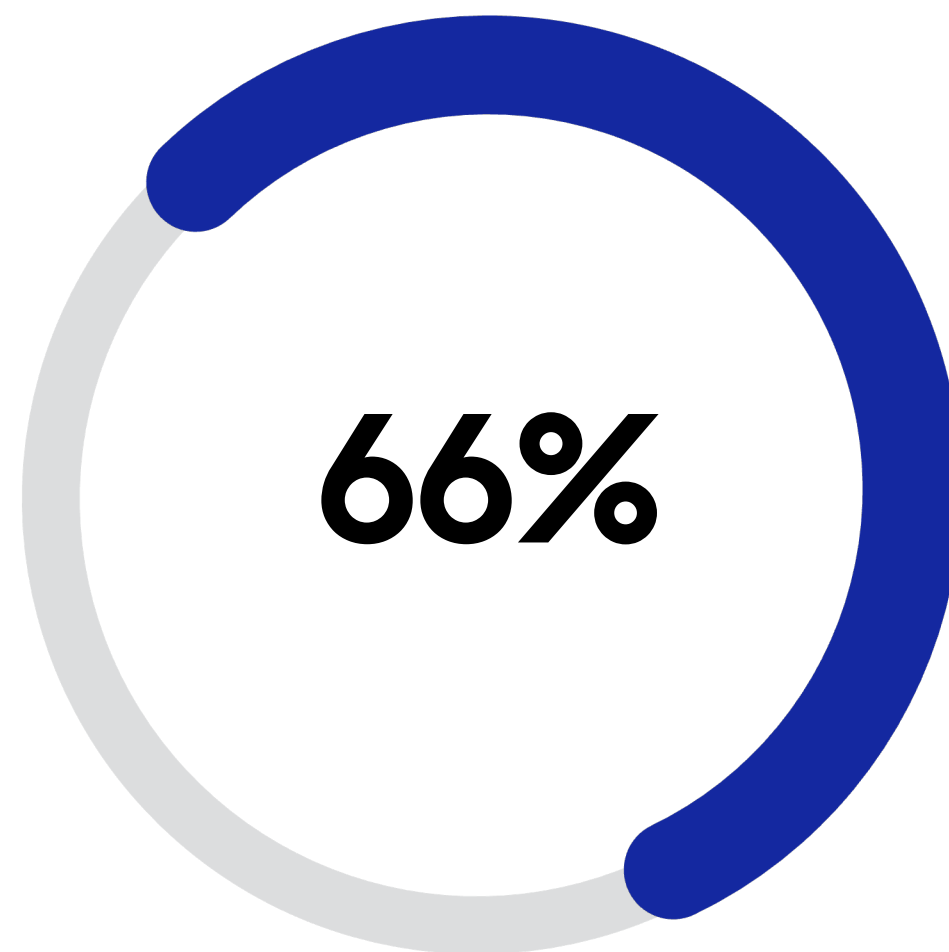


■ Viewers
■ Hours per Viewer per Month

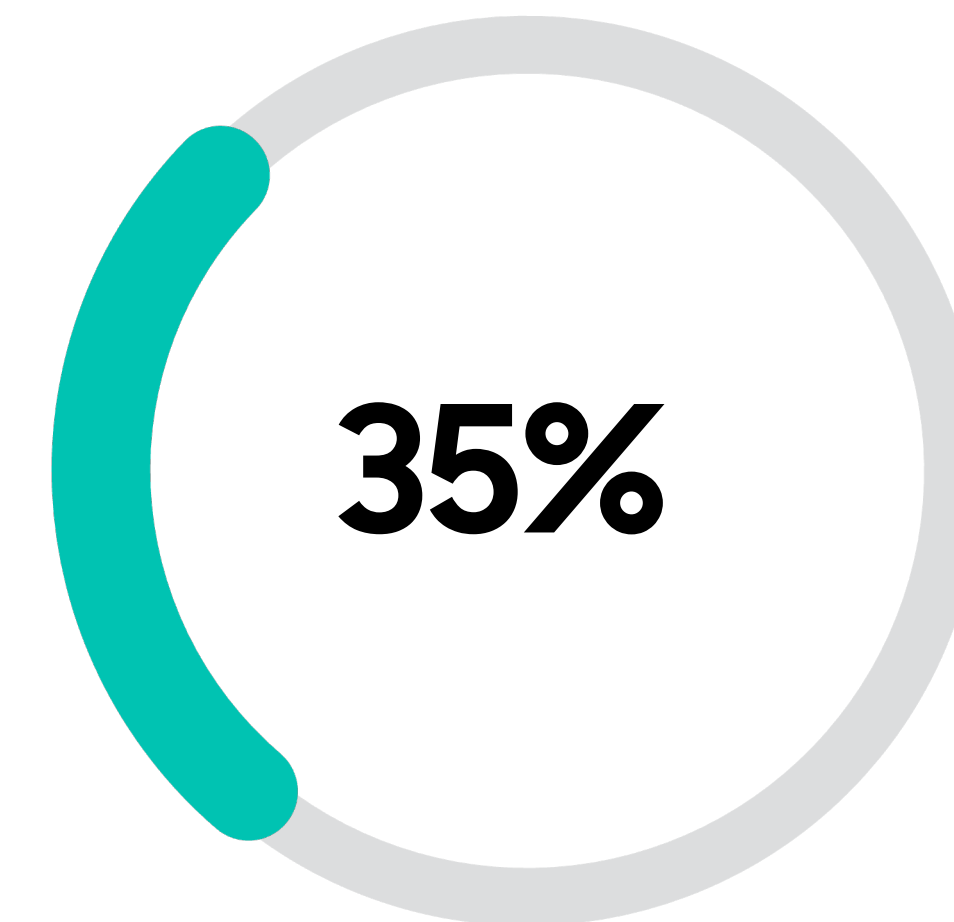
NFL season viewers ghosted the big 3 NFL streaming apps at twice their standard ghosting rate

Ghost viewership among 3 apps that stream live NFL games

New Users (During NFL Season)



Existing Users (Pre-NFL Season)



Smart TV advertising

The smart TV home screen is a gateway to much more than just watching TV



Internet Video

Self-Improvement

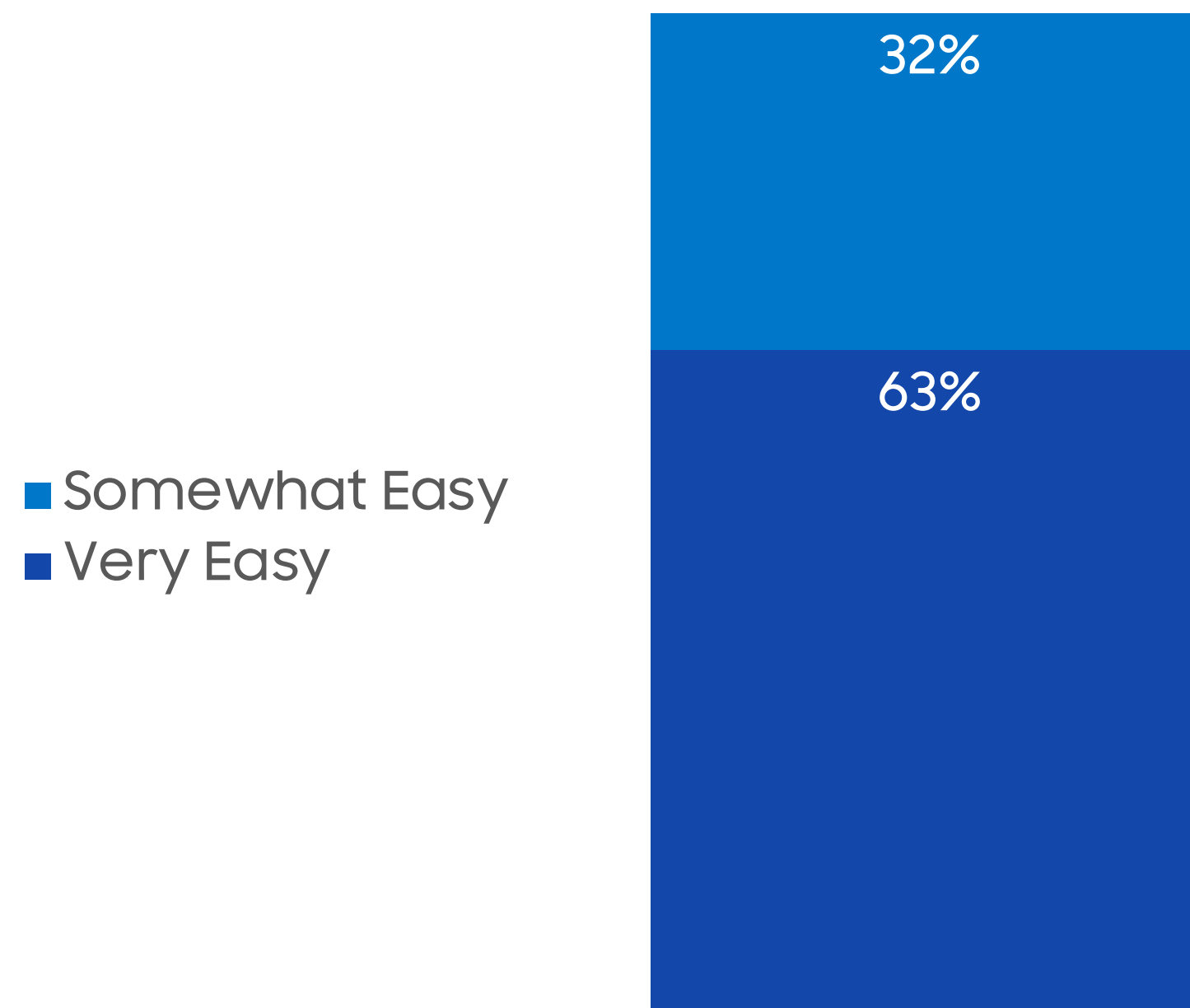
Gaming

Social Media

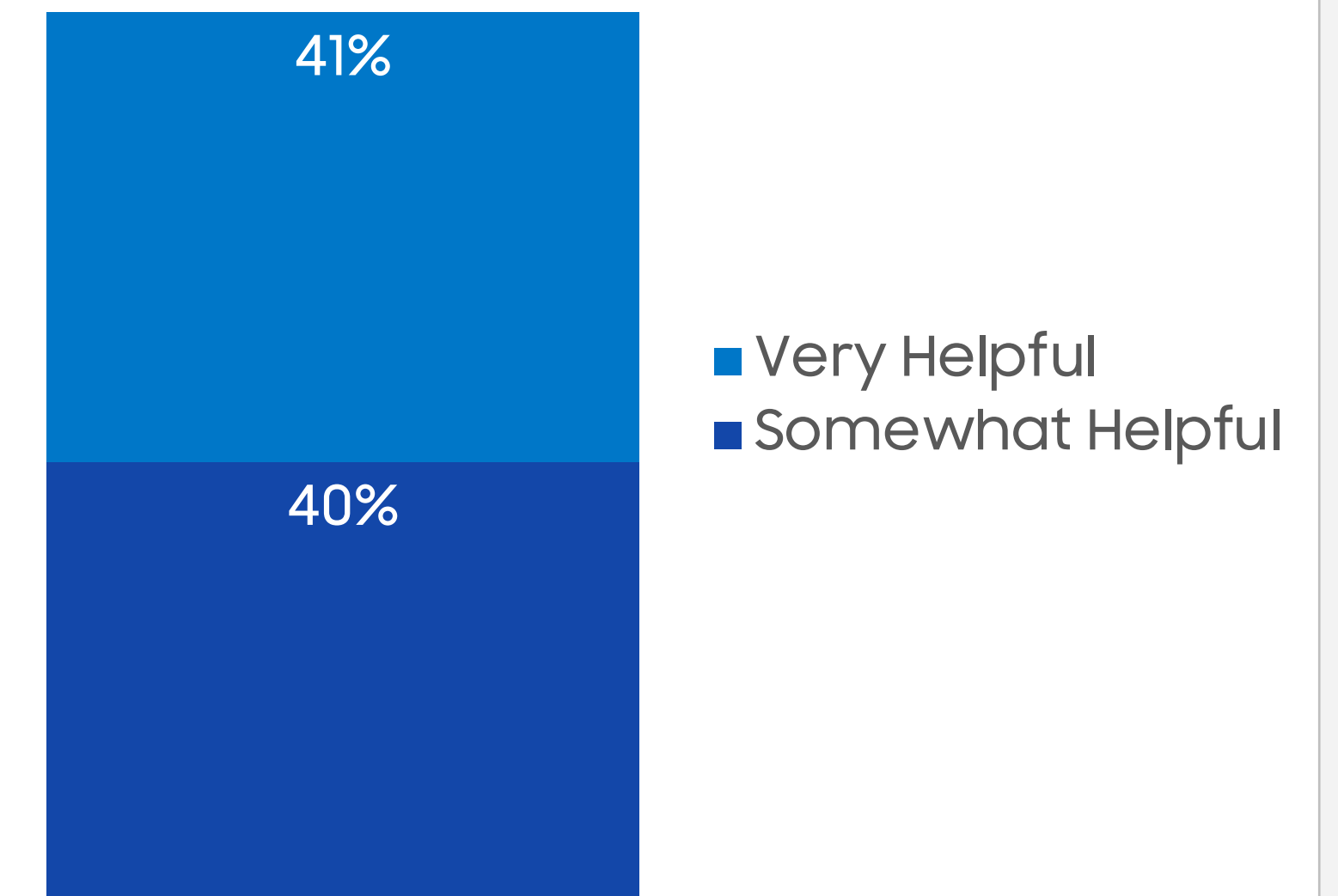
Smart Home Control

The Samsung home screen provides ease of use and valuable recommendations

The Samsung smart TV home screen is easy to use



Home screen recommendations are helpful



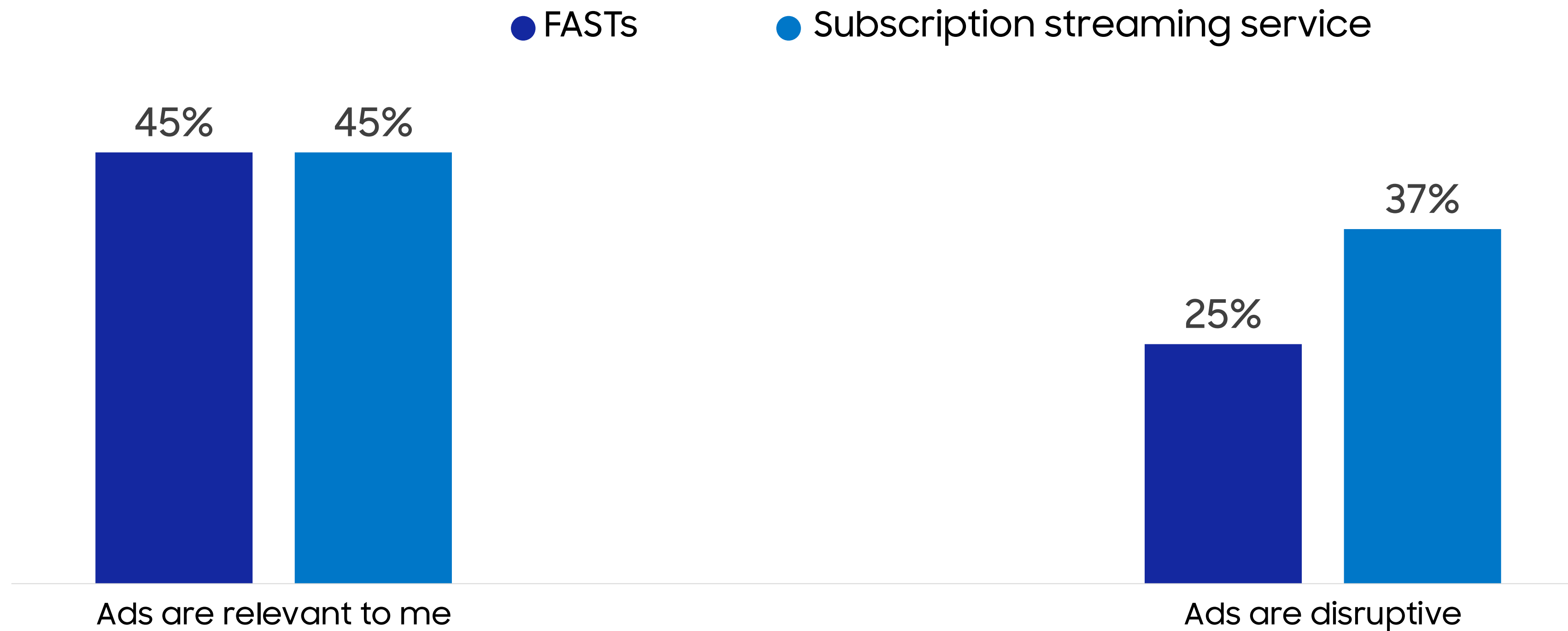
Source: Samsung Ads proprietary survey of 1,000 US Smart or Connected TV owners

With ad-supported
streaming
penetration at 82%,
FAST usage has
grown as well



Ads on FAST are as relevant as those on subscription streaming and less disruptive to the viewing experience

Ad attitudes by content type



Attention to ads
on FAST is
greater than:

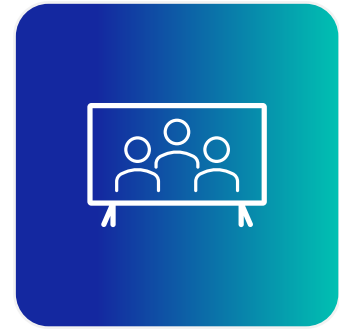
Subscription
streaming apps
+3%

Virtual MVPDs
+7%



Why Samsung Ads

Samsung by the numbers



80M

Active TVs

62M

HHs

The Samsung Smart TV HHs



Median Age: 51
48%/52% M/F

Median HHI:
\$106.5K

Presence of
children: 24%

22% Non-White
/Hispanic

#1

Smart TV
manufacturer
for **20** years

36%

Of 'most-used'
smart TV sets



Samsung
TV Plus

97M+

Americans
reached in TV Plus
households

More attention
than:

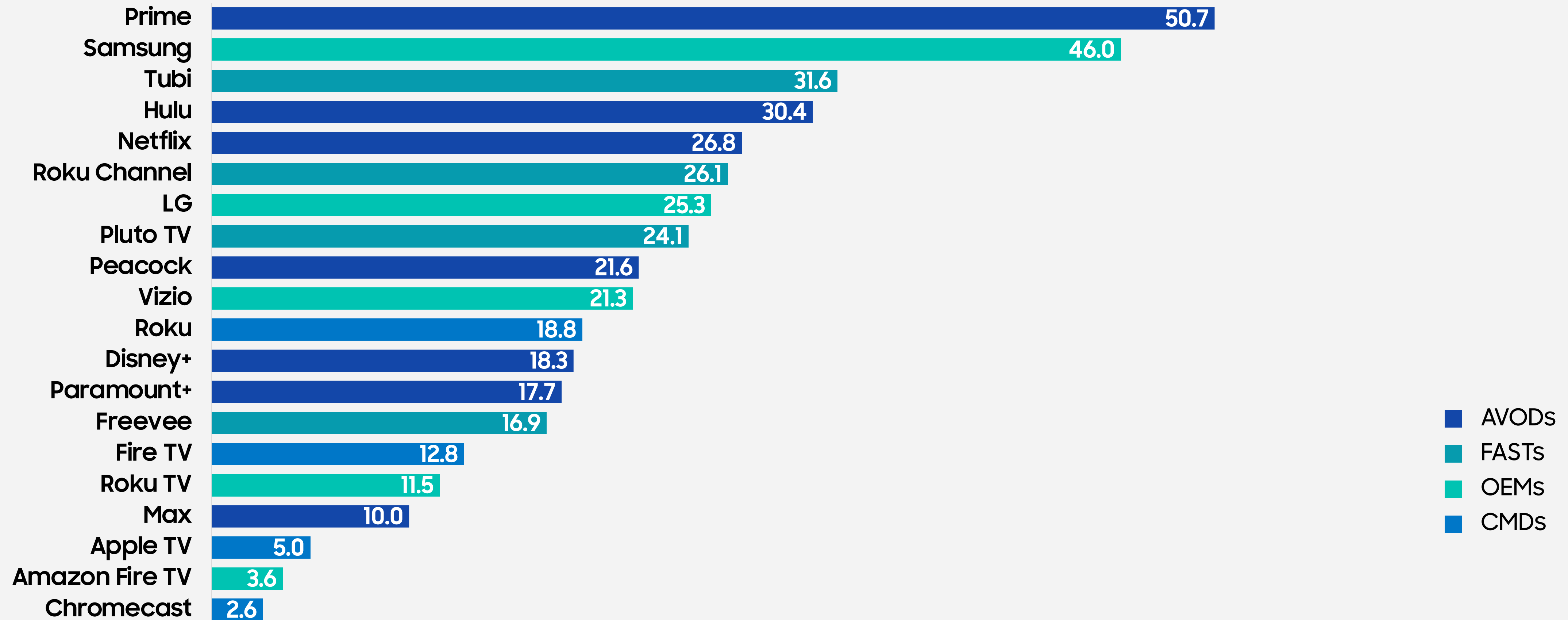
- Subscription streaming
- Other FASTs
- vMVPDs

Loyal audience

92% of TV Plus adopters
continue to watch after 3 months

Samsung reaches more US households with ads than almost every other streaming platform

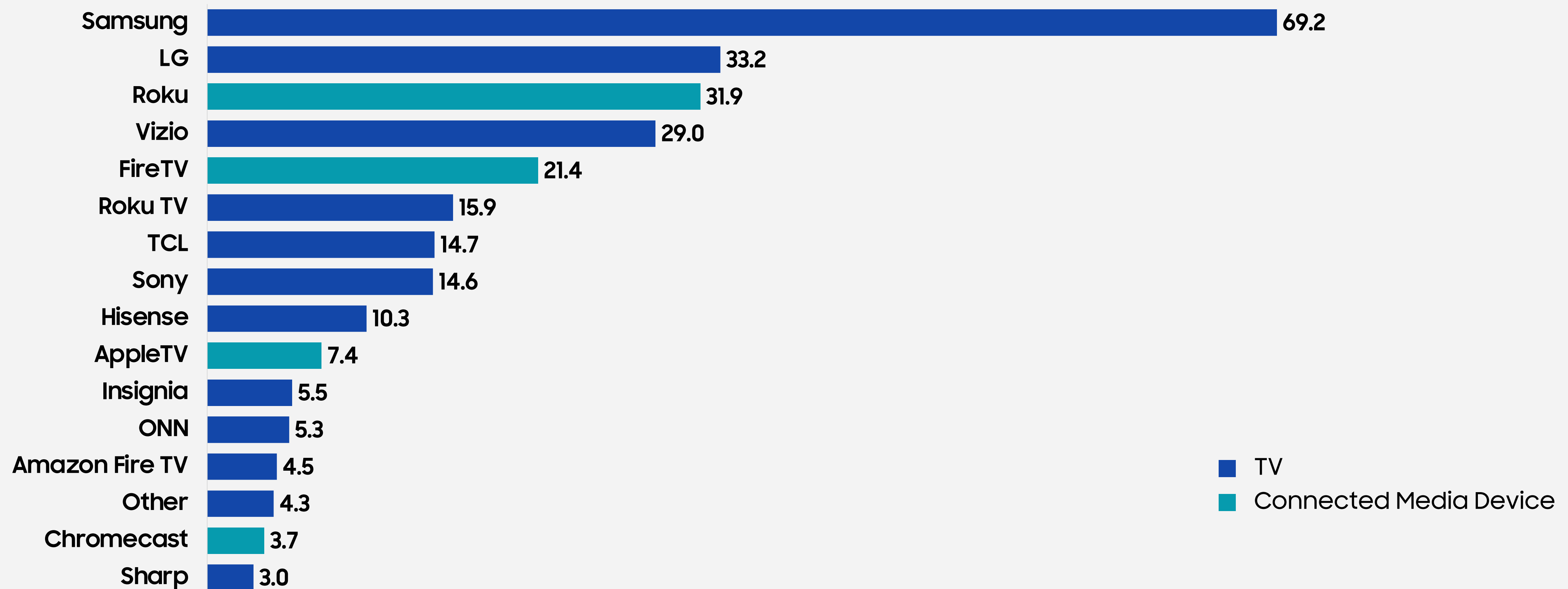
Ad-Supported Reach (in millions of HHs)



Source: ARF DASH, Full Year 2025, US. Roku is the connected media device (sticks and pucks) and the projection is based on the number of HHs that have a Roku device attached to any of the TVs in the HH. Roku TV is the standalone Smart TV with Roku OS built in. Roku Channel is the FAST service across Roku devices and Roku TV. Amazon Fire is the connected media device (sticks and pucks) and the projection is based on the number of HHs that have a Fire TV device attached to it. Amazon Fire TV is the standalone Smart TV with the Fire TV OS built in.

Samsung's scale vs the competition

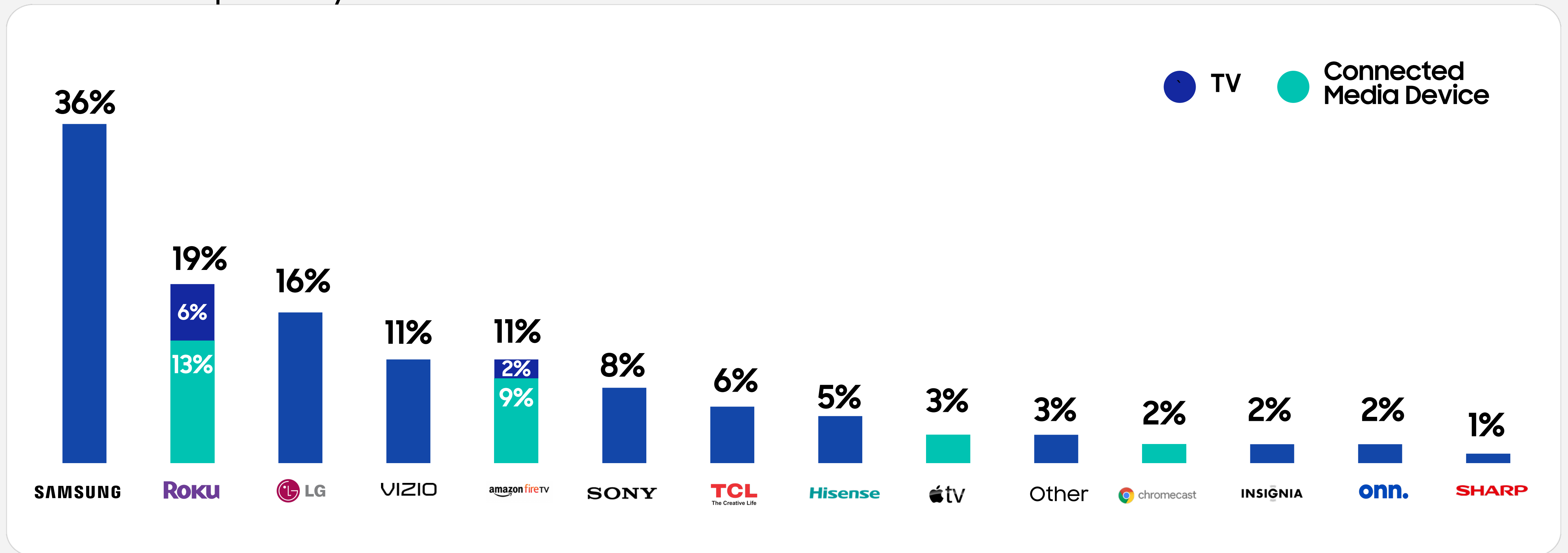
Total Smart TVs (in millions)



Source: ARF DASH, Full Year 2025, US. Roku is the connected media device (sticks and pucks) and the projection is based on the number of Smart TVs that have a Roku device attached. Roku TV is the standalone Smart TV with Roku OS built in. Fire TV is the connected media device (sticks and pucks) and the projection is based on the number of Smart TVs that have a Fire TV device attached to it. Amazon Fire TV is the standalone Smart TV with the Fire TV OS built in.

Many homes have multiple TV sets - Samsung TVs are the most-watched sets in more than 1 in 3 smart TV households

Share of primary smart TVs in the U.S.



Source: ARF DASH, Full Year 2025, US. Roku is the connected media device (sticks and pucks) and the share is based on the number of Primary Smart TVs that have a Roku device attached. Roku TV is the standalone Smart TV with Roku OS built in. Fire TV is the connected media device (sticks and pucks) and the share is based on the number of Smart TVs that have a Fire TV device attached to it. Amazon Fire TV is the standalone Smart TV with the Fire TV OS built in.

Thank you