



The Battle for the American/Canadian Couch Potato: OTT and TV

March 2026

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Commentary

Since 2003, we have published our Couch Potato Report series every year. **The Battle for the American/Canadian Couch Potato: OTT and TV, March 2026**, (476 pages), contains detailed analysis of offers (including prices & programming), deals & rights, strategy, subscriber & financial performance metrics (including forecasts) by Company & Market. In addition to Convergence analysis, sources include company interviews, annual/quarterly reports & presentations, CRTC, Statistics Canada, US Census.

US Commentary (Canadian Commentary follows), please see Table of Contents for what is included in this Report:

Based on analysis of over 90 OTT services (over 60 providers), led by Netflix, Disney, Amazon, we estimate 2025 US OTT access (subscription) revenue grew 14% to \$77.7 billion (well exceeding 2025 US TV subscription revenue), and forecast 15% growth in 2026 to \$89 billion. We expect XX growth rates will X through 2028.

We forecast total US paid OTT subscriptions, which we estimate reached 594 million YE2025, annual rate of growth will decline from high single to low-mid single digits through 2028. Concurrently we expect US OTT household penetration and subscriptions per household will start to level out. Based on 10 leading OTT providers, we estimate the average US price increase across the providers was 12% in 2025 and we forecast 2026 will be similar. That being said OTT offers with advertising represent a significant cost savings (on average 42% less) to similar offers without advertising.

Based on our forecast trajectory, US AVOD (free ad-supported OTT) and SVOD TV (paid OTT subscription with ads) advertising revenue will exceed traditional US TV advertising revenue in X.

We estimate 2025 saw a decline of 4.4 million US Cable, Satellite, Telco TV subscribers, and we forecast a decline of 4 million TV subs in 2026; we estimate US TV subscribers declined by 9% in 2025 and we forecast on average 9% declines/annum through 2028.

We estimate 2025 US Cable, Satellite, Telco TV access (subscription) revenue declined 10% to \$64 billion and forecast on average 8.5% declines/annum through 2028.

Charter in particular is helping slow the rate of decline but net-net traditional TV access is well into becoming a niche product.

As illustrated in our US Cord Cutter/Never Household Model, as of YE2025 we estimate X million US households (67% of HHs) did not have a TV subscription with a Cable, Satellite, or Telco TV access provider, and we forecast a rise to 76% of HHs YE2028.

As most TV access providers are broadband providers there are also benefits to facilitating OTT. Annual residential broadband revenue has more than doubled over the last decade.

Canadian Commentary, please see Table of Contents for what is included in this Report:

Canada is increasingly being impacted by the OTT war being waged by global, mainly US programmers and independent OTT providers. Although for programmers, Canada is a direct to consumer opportunity as well as an opportunity to sell to Amazon, Apple, DAZN, Fubo, Netflix, Canadian programmers and linear/OTT providers continue to remain attractive. Amazon, Apple, DAZN, Disney+, Discovery+, Fubo, hayu, Netflix, Paramount+ impinge on the Canadian TV/OTT model, alternatively Warner and Starz have had long-term multiplatform deals with Bell for many years, while NBCU & Warner recently cut multiplatform deals with Rogers and NBCU with Bell.

Based on analysis of over 55 OTT services (over 35 providers), led by Netflix, we estimate 2025 Canadian OTT access (subscription) revenue grew 15% to \$4.8 billion, we forecast 11.5% growth in 2026 to \$5.35 billion, with 2027 exceeding annual TV subscription revenue. We expect XX growth rates will X through 2028.

Although revenue is growing for both Canadian and non-Canadian OTT access providers we forecast Canadian TV Access Providers & Programmers OTT access revenue share will stay in the X% range 2026-2028.

We forecast total Canadian paid OTT subscriptions, which we estimate reached over 38 million YE2025, annual rate of growth will decline from high single to low-mid single digits through 2028, while both Canadian OTT household penetration and subscriptions per household grow moderately. Based on 10 leading OTT providers, we estimate the average Canadian price increase across the providers was 7% in 2025 and we forecast 2026 will be X. That being said OTT offers with advertising represent a significant cost savings (on average 42% less) to similar offers without advertising.

Based on our forecast trajectory, Canadian AVOD (free ad-supported OTT) and SVOD TV (paid OTT subscription with ads) advertising revenue will exceed traditional Canadian TV advertising revenue in X.

We estimate 2025 saw a decline of 4% of Canadian Cable, Satellite, Telco TV subscribers, and forecast 5% declines on average through 2028.

We estimate 2025 Canadian Cable, Satellite, Telco TV access (subscription) revenue declined 5% to \$6.2 billion and forecast similar declines through 2028 and negative ARPU growth.

As illustrated in our Canadian Cord Cutter/Never Household Model, as of YE2025 we estimate X million Canadian households (48.5% of HHs) did not have a TV subscription with a Cable, Satellite, or Telco TV access provider, and forecast a rise to 57% YE2028.

Canadian TV subscribers and access revenue are currently not seeing as steep a rate of decline as the US, but this could change, dependent on new or expanded OTT offers in Canada.

As Canadian TV access providers are also broadband providers there are benefits to facilitating OTT, annual residential broadband revenue has almost doubled over the last decade.