

T>>VISION

FEBRUARY 2026

State of Streaming



Table of Contents

INTRODUCTION

- 3 Jason Wiese, VAB, on the State of streaming
- 4 TVision's single source panel measurement
- 5 Revealing a day in the life of a viewer

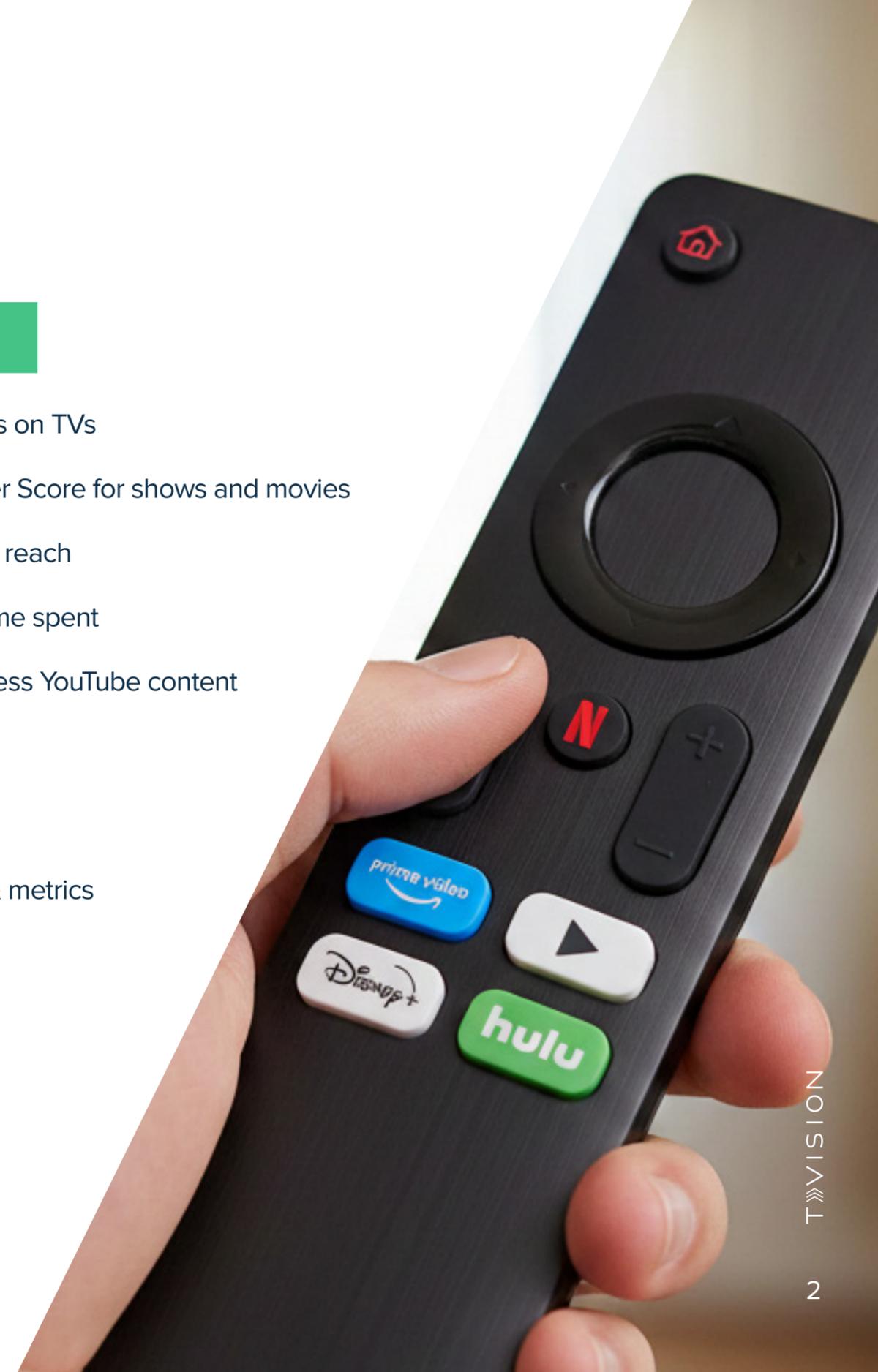
ATTENTION INFLUENCERS

- 6 How ad pod position impacts attention
- 7 How context impacts ad attention
- 8 Understanding the impact of context on ad engagement
- 9 How attention varies in longtail content
- 10 The viewer attention variance for YouTube and premium CTV
- 11 How NFL engagement varies across networks and apps
- 12 How NFL ad placements boost engagement in subsequent exposures

THE APP LANDSCAPE

- 13 The number of apps on TVs
- 14 The H2 2025 Power Score for shows and movies
- 15 Apps by household reach
- 16 Apps by share of time spent
- 17 Where viewers access YouTube content

- 18 About TVision
- 19 Our methodology & metrics



State of Streaming



As we move head first into 2026 one thing is increasingly clear: streaming television has emerged as the dominant force in television.

Despite its clear ascension, challenges remain for the industry as we collectively maximize the opportunity.

One of the biggest challenges is understanding the role of YouTube in the digital video ecosystem beyond a simple ‘time spent’ metric. TVision’s research helps the industry more clearly understand differences in the quality of engagement between YouTube and premium streaming apps.

As they make increasing investments in streaming, marketers are seeking answers on important questions related to ad opportunities:

- **How do marketers identify the right advertising opportunities?**

While app and daypart are considerations, marketers can further optimize based on context and ad pod position. Two concepts TVision explores in this report.

- **How can marketers make the most of multi-device opportunities for engagement?**

Understanding how viewers interact across mobile and television is an important part of maximizing the customer journey. Data from TVision’s single source panel provides important insight.

Of course, no conversation about the state of streaming TV is complete without considering live sports. TVision’s research shows that there is a “halo effect”. Ads that first aired in the NFL playoffs see increasing attention in subsequent exposures.

TVision’s reporting helps marketers understand and react to these challenges and more with unique second-by-second, person-level data.



Jason Wiese

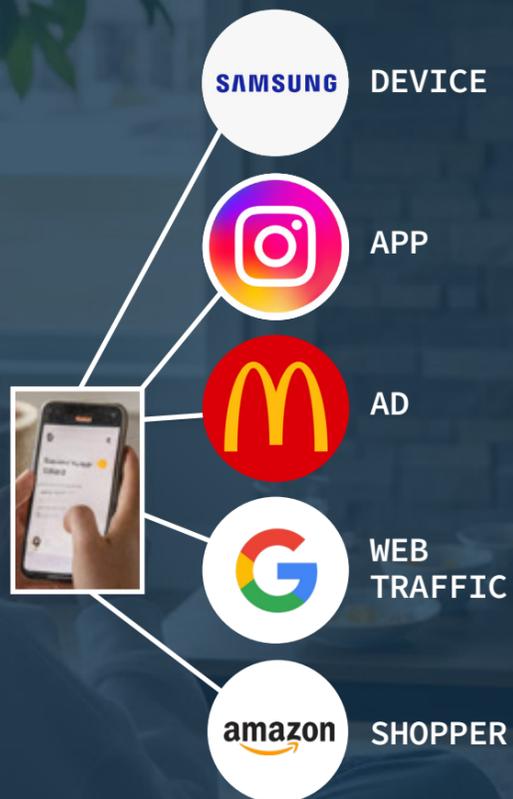
Executive Vice President, Strategic Insights & Measurement
VAB

TVision's single source, multi-device measurement delivers complete insights into the viewer experience

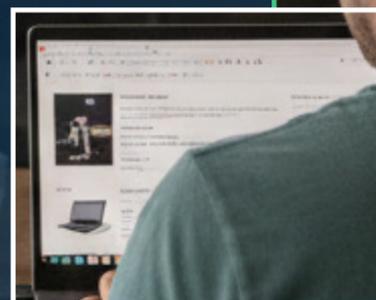
TLC SMART TV
YouTube TV application
NFL Hockey on ABC



FEMALE | AGE 35
In-room
Not attentive



MALE | AGE 36
In-room
Not attentive



TVision's advanced single-source panel enables us to seamlessly and passively measure person-level engagement with multiple devices, including phones, tablets and the livingroom TV. We deliver second-by-second insights into the viewer experience as their attention shifts between the big and little screens. This data provides important perspective for brands and publishers trying to understand the customer journey.

Typical TV viewers engage with multiple devices throughout the day

In a multi-device world it's necessary to understand how viewers engage with content and apps throughout the day. These insights into viewer behavior can inform advertising strategies to reach engaged audiences on the device of their choice throughout the day.

MEDIA HABITS OF A DALLAS-BASED SINGLE MOTHER AND TEEN DAUGHTER



7AM CST

Mom starts her day at 7 am with Facebook scrolling on her smartphone. She remains active on her device throughout the day.



2PM – 3PM CST

When the daughter returns from school at 2 pm, the two co-view Netflix and the Spectrum TV app.

A pattern of regular smart phone usage and specific windows for co-viewing and favored content emerges.



9AM – 2PM CST

But during school and work hours the mom uses her device for productivity and personal tasks: Messaging, shopping and phone call apps are in use.



7PM CST – ON

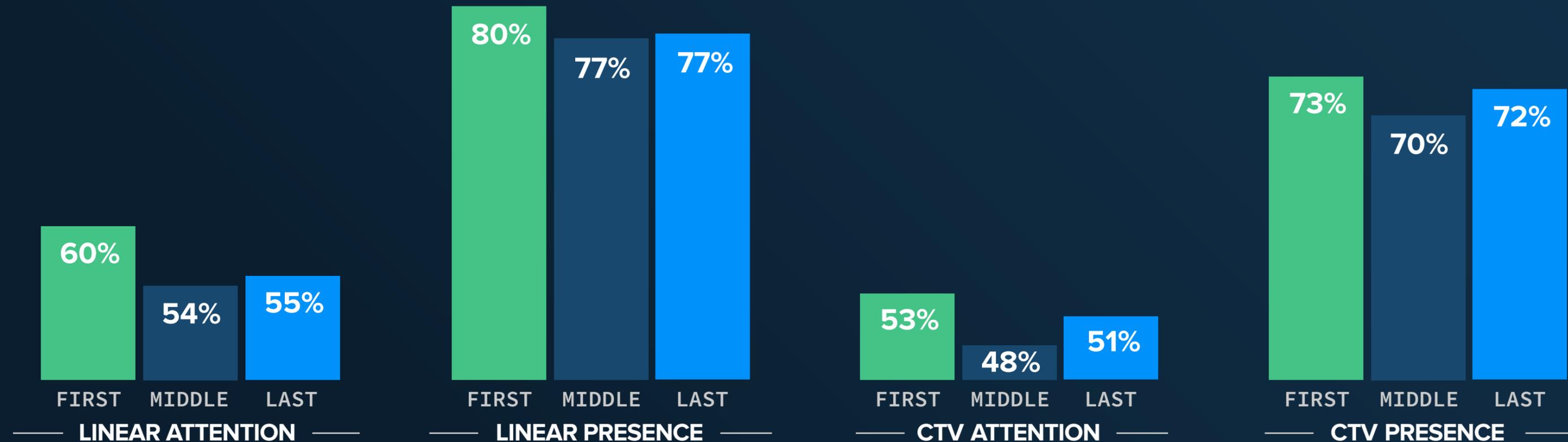
In the evening the mom starts watching local news on linear TV. Her smartphone activity decreases suggesting more focused TV viewing.

First in pod ads capture more attention on CTV and Linear

Across all pod positions, linear ads traditionally deliver higher overall attention and presence than CTV ads. Factors that influence the attention delta between linear and CTV include the expectation of viewers. Linear viewers are accustomed to commercials.

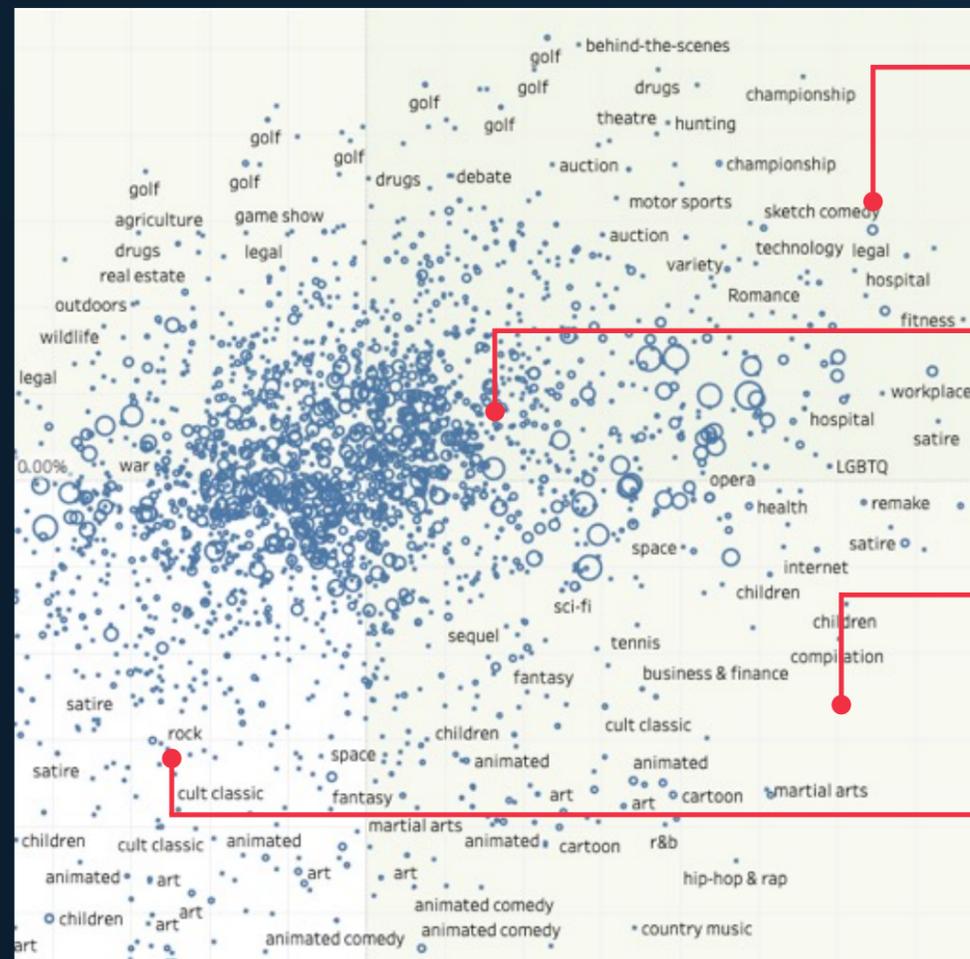
Middle pod ads on streaming TV see the lowest overall attention, taking a larger dip when compared to last-in-pod ads than linear. The prevalence of ad counters on streaming TV may contribute to the drop in attention mid-pod.

PRESENCE AND ATTENTION TO ADS BY POD



Context matters: same industry, different context, different results

VIEWER ATTENTION VARIES BASED ON BRAND INDUSTRY AND PROGRAM CONTEXT



INDUSTRY: Restaurants
 CONTEXT: Business
 INDUSTRY LIFT: 12%
 CONTEXT LIFT: 10%

INDUSTRY: Restaurants
 CONTEXT: Troubled relationship
 INDUSTRY LIFT: 2%
 CONTEXT LIFT: 4%

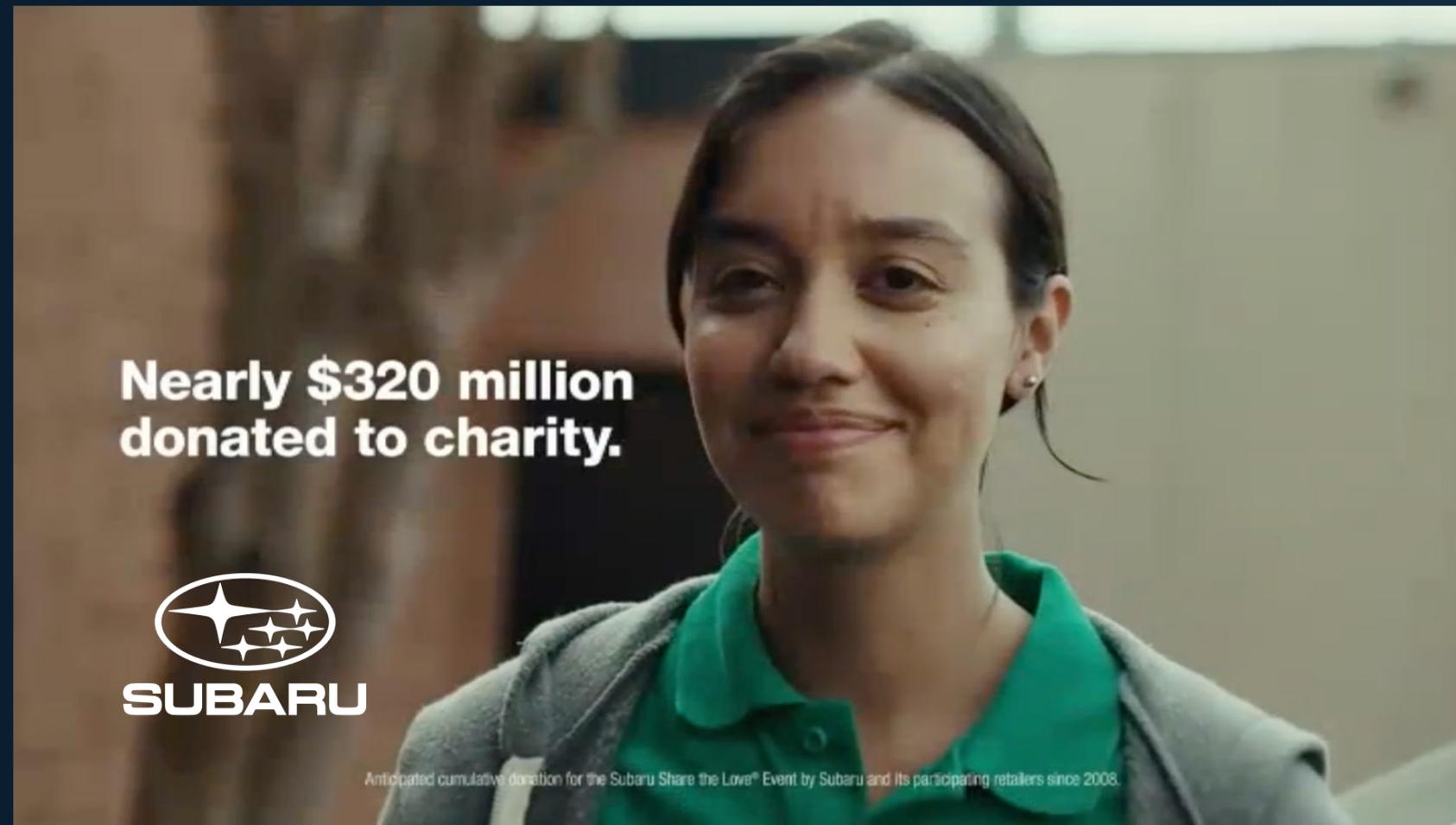
INDUSTRY: Restaurants
 CONTEXT: Romance
 INDUSTRY LIFT: 11%
 CONTEXT LIFT: -12%

INDUSTRY: Restaurants
 CONTEXT: Valentine's Day
 INDUSTRY LIFT: -2%
 CONTEXT LIFT: -11%

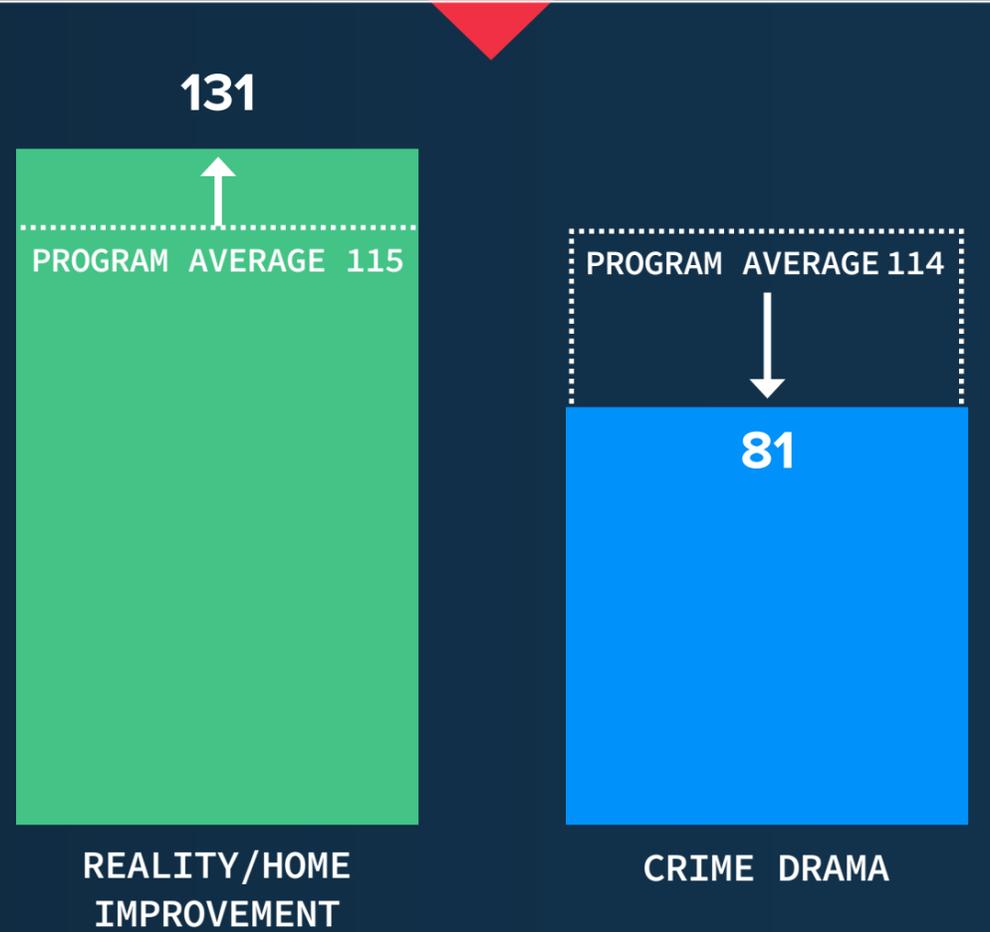
TVision's attention data confirms that different industries capture attention differently across context categories. The relationship between brand category and programming context is not always intuitive. For example, restaurant ads perform poorly in "romance" but much better when the context is "troubled relationships."

Creative performs differently in different context

Several factors influence an ad's ability to capture audience attention — the creative storytelling, the audience, pod placement and the time of day an ad runs all influence attention. Another important impact on attention is context. We examined a recent Subaru ad and learned that the ad performed well in a reality/home improvement program but underperformed in a crime drama.



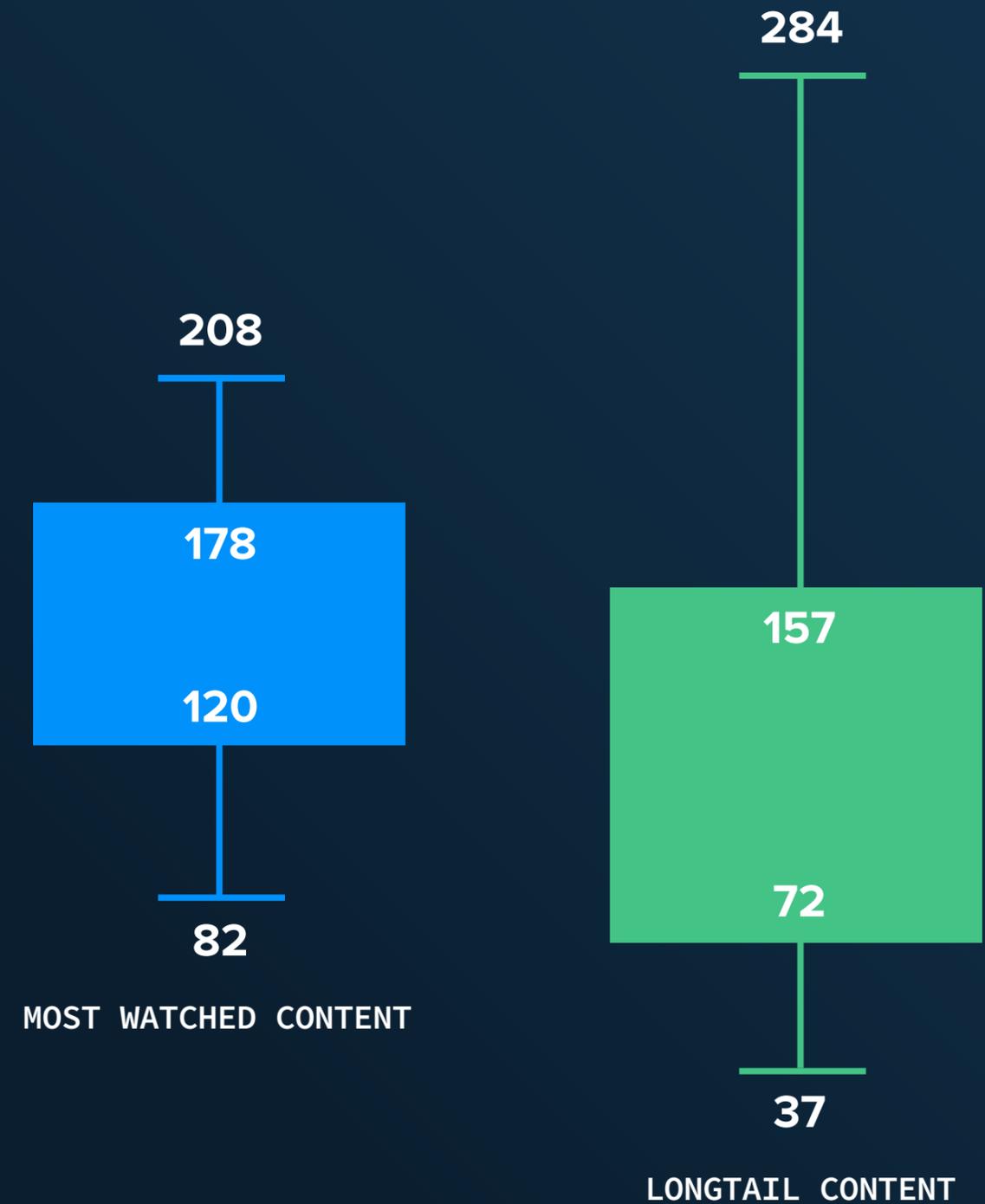
ATTENTION TO THE SUBARU AD VARIES BASED ON CONTEXT



Attention is a differentiator for longtail content

While there are always tentpole events and special programming that deliver high attention, most ads run in longtail content with niche audiences. Understanding which longtail content engages viewers best can make a meaningful difference in campaign performance.

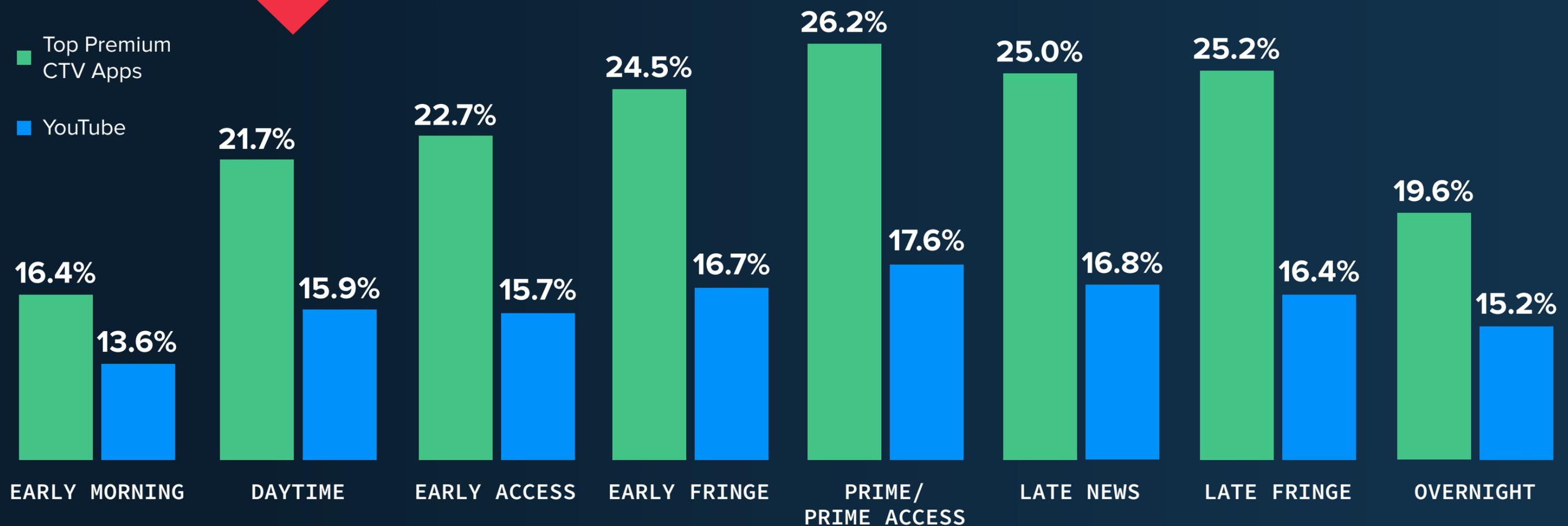
ATTENTION INDEX



Viewers pay more attention to premium streaming than YouTube

Across all dayparts viewers pay more attention to premium CTV apps than YouTube, according to TVision's Attention to Duration Ratio. In order to account for the wide range of content lengths across YouTube's video library, these metrics have been weighted based on the duration of the viewing session. This methodology is more representative of total time spent on YouTube when compared to apps with more traditional TV programming.

ATTENTION TO DURATION RATIO BY DAYPART

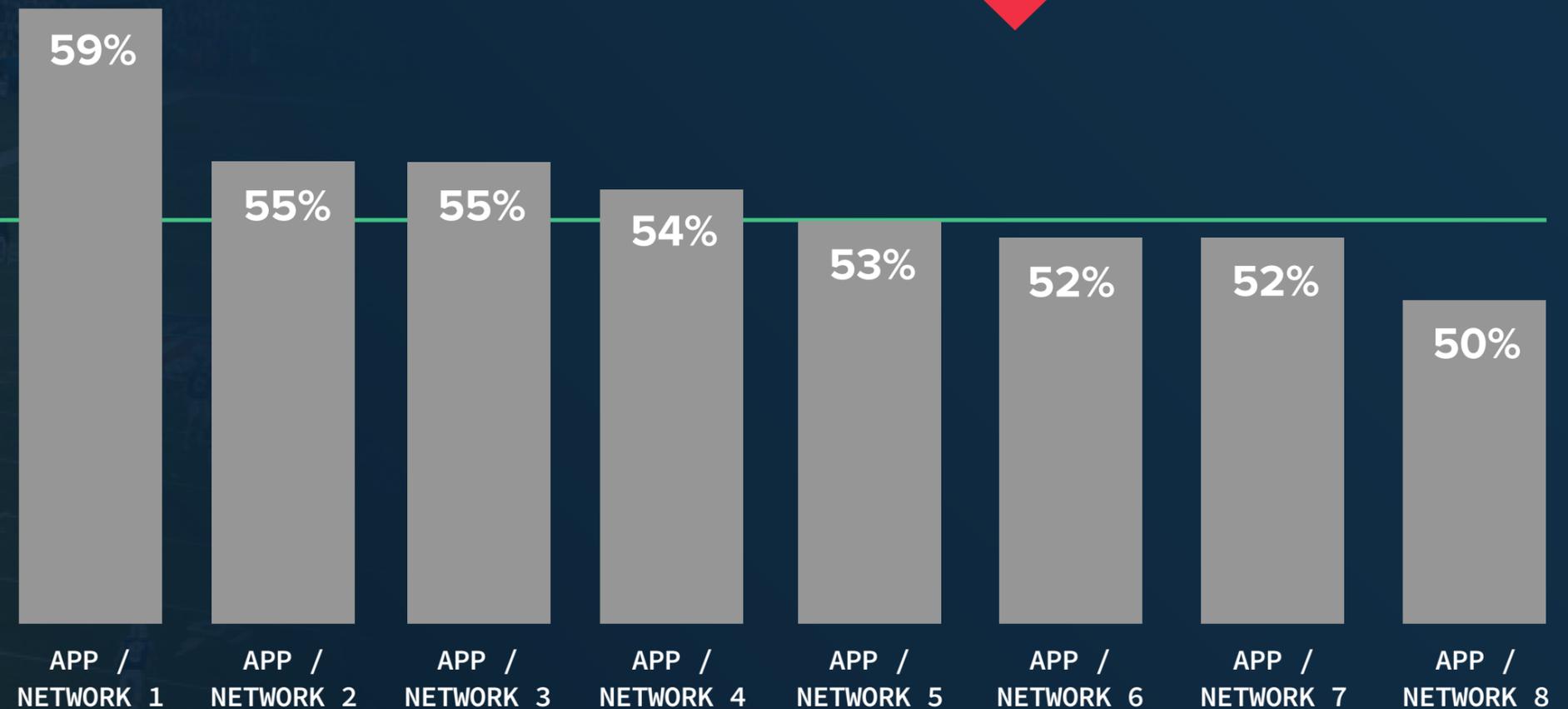


NFL program engagement varies across networks

Attention to NFL games varies across the apps and networks where the games air. The attention viewers pay to games is influenced by the on-field activity — close scores, big plays and rivalries all influence viewer attention to a particular game. Other factors that influence attention include the broadcast team, the schedule of programming and other things that are app/network-specific. As a result there is a significant variance in attention for the apps and networks carrying NFL games.

ATTENTION RATIO FOR NFL COVERAGE BY NETWORK/APP

53%
Average attention ratio
for NFL football programming

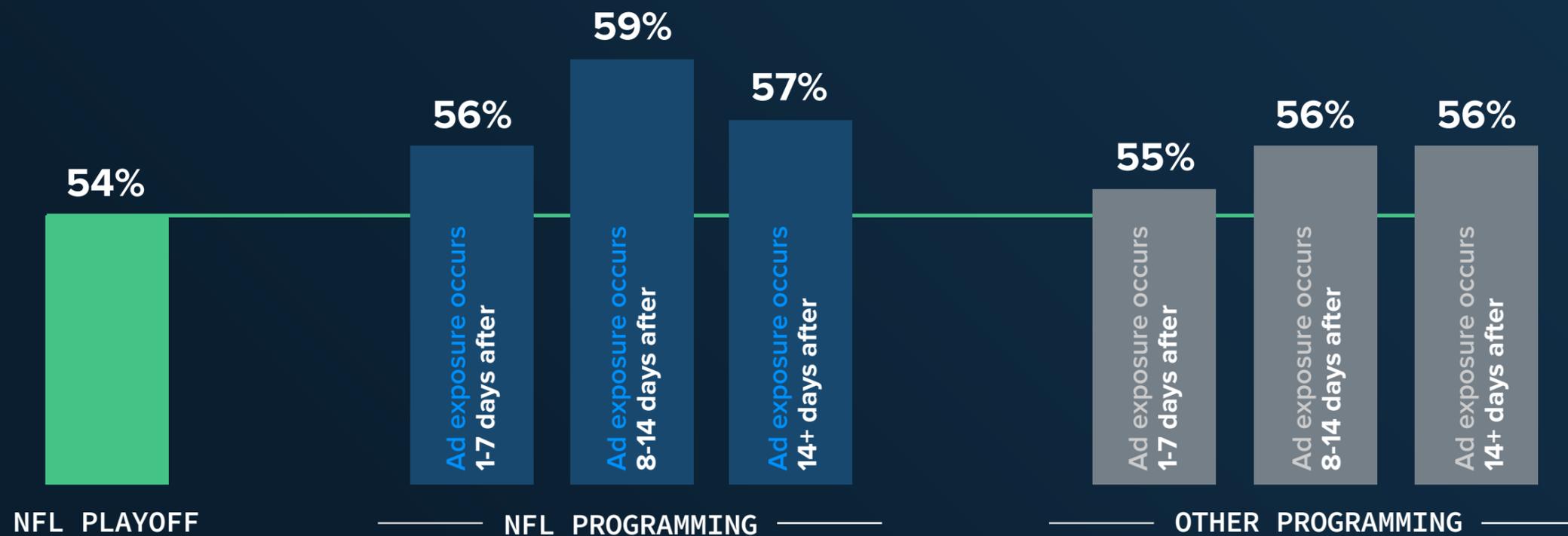


Want to understand the specific performance of apps and networks? Contact TVision at info@tvisioninsights.com.

There is a halo effect for brands that advertise in football

Ads that are first viewed in an NFL Playoff game capture higher attention on subsequent viewings of the ad in later NFL playoff games. A smaller uptick in attention also occurs for those same ads when viewed in other (non NFL) television programming.

AD ATTENTION FOR NFL PLAYOFF ADS





Americans access approximately 3 streaming apps per month

Since 2023 the number of apps accessed each month per household has stayed relatively stable.

2.9

2023

2.9

2024

2.8

2025

The top streaming shows & movies of H2 2025

ON THE TVISION POWER SCORE

Netflix content dominated the second half of 2025 with the app seeing 11 shows and 11 movies make the top 20 for the time period. The top overall program was Netflix’s “Wednesday.” Netflix’s “KPop Demon Hunters” was the top movie according to the Power Score metrics.

The TVision Power Score is the industry’s only ranking of streaming originals that factors in both attention and app reach to identify the shows and movies that are best engaging viewers. The Power Score leverages data from TVision’s industry-leading, second-by-second passive viewer panel to parse viewer engagement across hundreds of apps and thousands of programs. The TVision Power Score factors in four key metrics: the amount of time viewers spend paying attention to the program, the amount of program time available for the season, the program’s reach, as well as the application’s reach. This combination of metrics best identifies the quality programming that draws in audiences.

THE TVISION POWER SCORE

July 1, 2025 — December 31, 2025

Streaming Shows

These are the top performing streaming shows across all apps, from July 1, 2025 — December 31, 2025

- Netflix 1 WEDNESDAY (S2)
- Netflix 2 STRANGER THINGS (S5)
- Netflix 3 THE BEAST IN ME (S1)
- Paramount+ 4 LANDMAN (S2)
- Netflix 5 UNTAMED (S1)
- Netflix 6 NOBODY WANTS THIS (S2)
- Netflix 7 SEAN COMBS: THE RECKONING (S1)
- Netflix 8 AMY BRADLEY IS MISSING (S1)
- Peacock 9 ALL HER FAULT (S1)
- Paramount+ 10 TULSA KING (S3)
- Netflix 11 MONSTER: THE ED GEIN STORY (S1)
- Netflix 12 BLACK RABBIT (S1)
- Hulu 13 THE BEAR (S4)
- Hulu 14 ONLY MURDERS IN THE BUILDING (S5)
- Netflix 15 FIT FOR TV: THE REALITY OF THE BIGGEST LOSER (S1)
- Apple TV 16 PLURIBUS (S1)
- Amazon 17 BALLARD (S1)
- HBO Max 18 IT: WELCOME TO DERRY (S1)
- Netflix 19 WAYWARD (S1)
- Paramount+ 20 LANDMAN (S1)

Streaming Movies

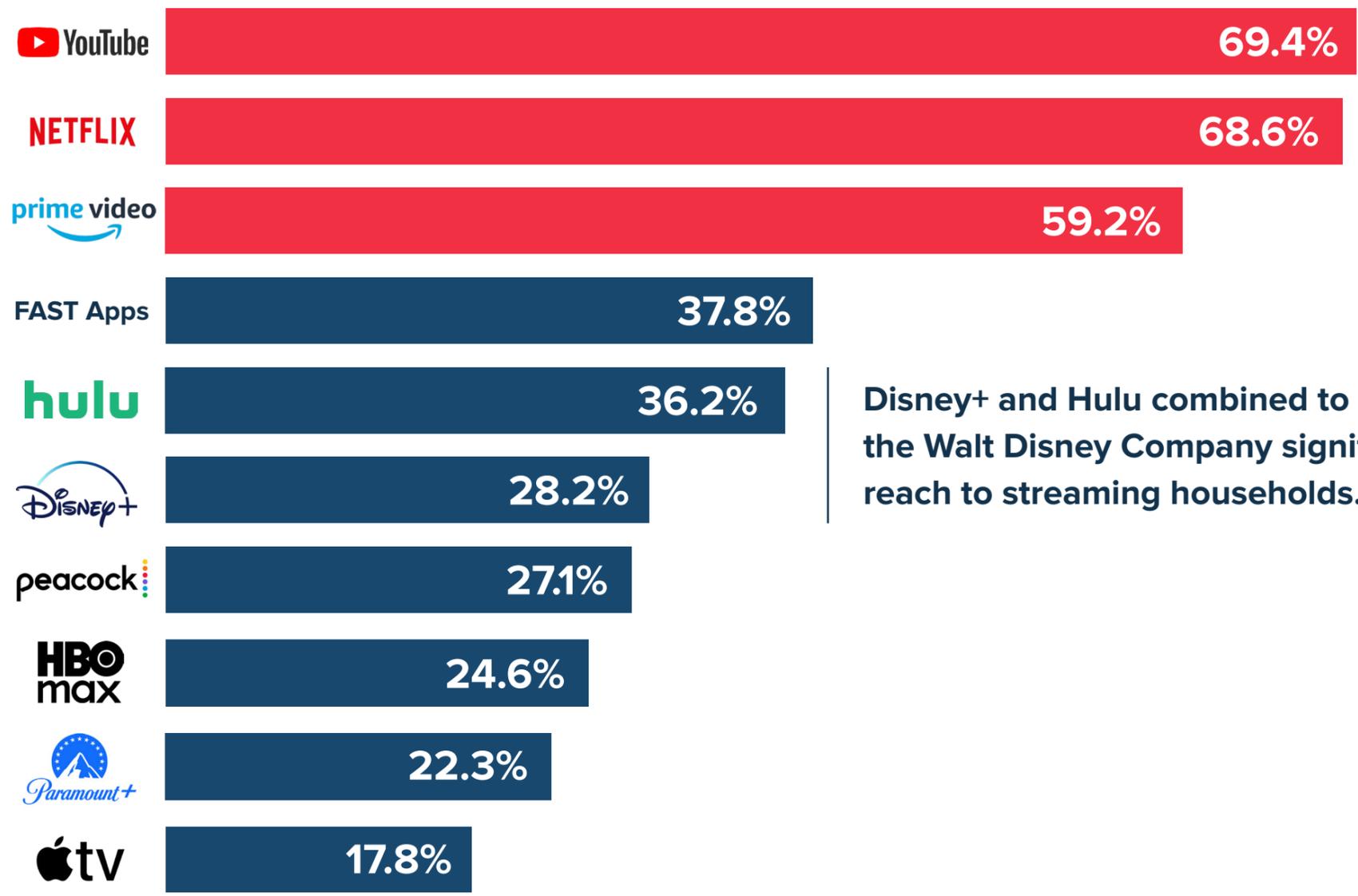
These are the top performing streaming movies across all apps, from July 1, 2025 — December 31, 2025

- Netflix 1 KPOP DEMON HUNTERS
- Netflix 2 HAPPY GILMORE 2
- Amazon 3 HEADS OF STATE
- Netflix 4 A HOUSE OF DYNAMITE
- Peacock 5 WICKED: SING-ALONG
- Netflix 6 THE PERFECT NEIGHBOR
- Amazon 7 PLAYDATE
- Amazon 8 THE PICKUP
- Netflix 9 UNKNOWN NUMBER: THE HIGH SCHOOL CATFISH
- Netflix 10 THE THURSDAY MURDER CLUB
- Netflix 11 MADEA’S DESTINATION WEDDING
- Amazon 12 OH. WHAT. FUN.
- Netflix 13 WAKE UP DEAD MAN: A KNIVES OUT MYSTERY
- Netflix 14 THE WOMAN IN CABIN 10
- AppleTV 15 HIGHEST 2 LOWEST
- AppleTV 16 THE FAMILY PLAN 2
- Disney+ 17 LILO & STITCH
- Netflix 18 A MERRY LITTLE EX-MAS
- Netflix 19 THE OLD GUARD 2
- Peacock 20 DROP

See the Power Score every Wednesday at TVisionInsights.com/signal

Three apps reached a majority of streaming-enabled households in 2025

APP HOUSEHOLD REACH: H2 2025



YouTube, Netflix and Amazon Prime reached a majority of CTV enabled households in H2 2025.

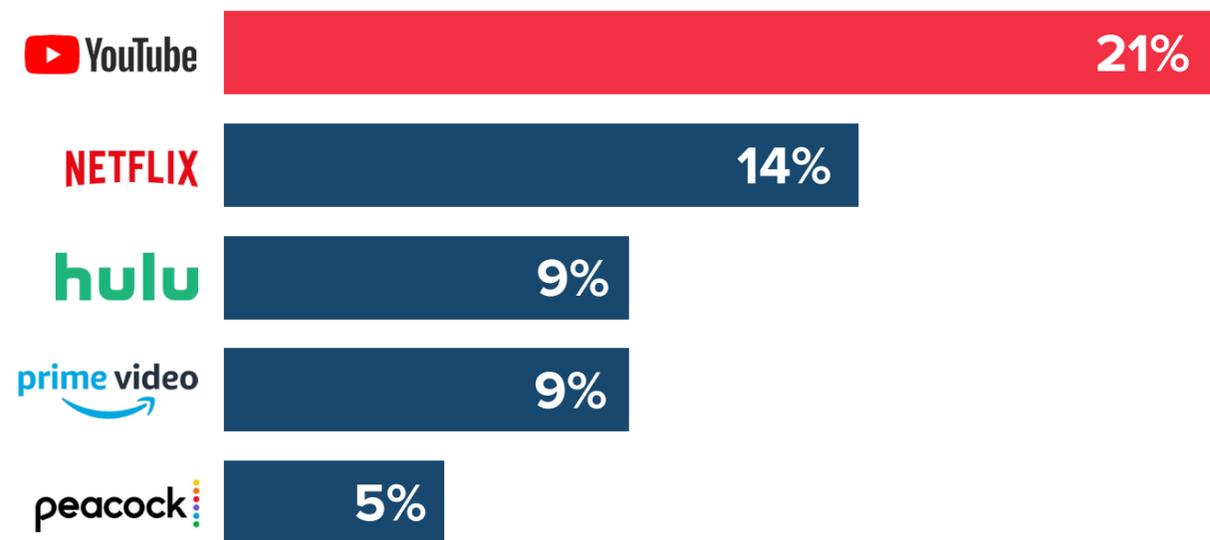
Disney+ and Hulu combined to provide the Walt Disney Company significant reach to streaming households.



Source: TVision Panel, P2+, January 1-December 31, 2025 | Household Reach represents the proportion of households exposed at least once to the app within the timeframe. | FAST represents a roll up of all FAST apps.

Five apps captured more than half of all H2 2025 viewing time

H2 2025 SHARE OF TIME SPENT FOR STREAMING APPS

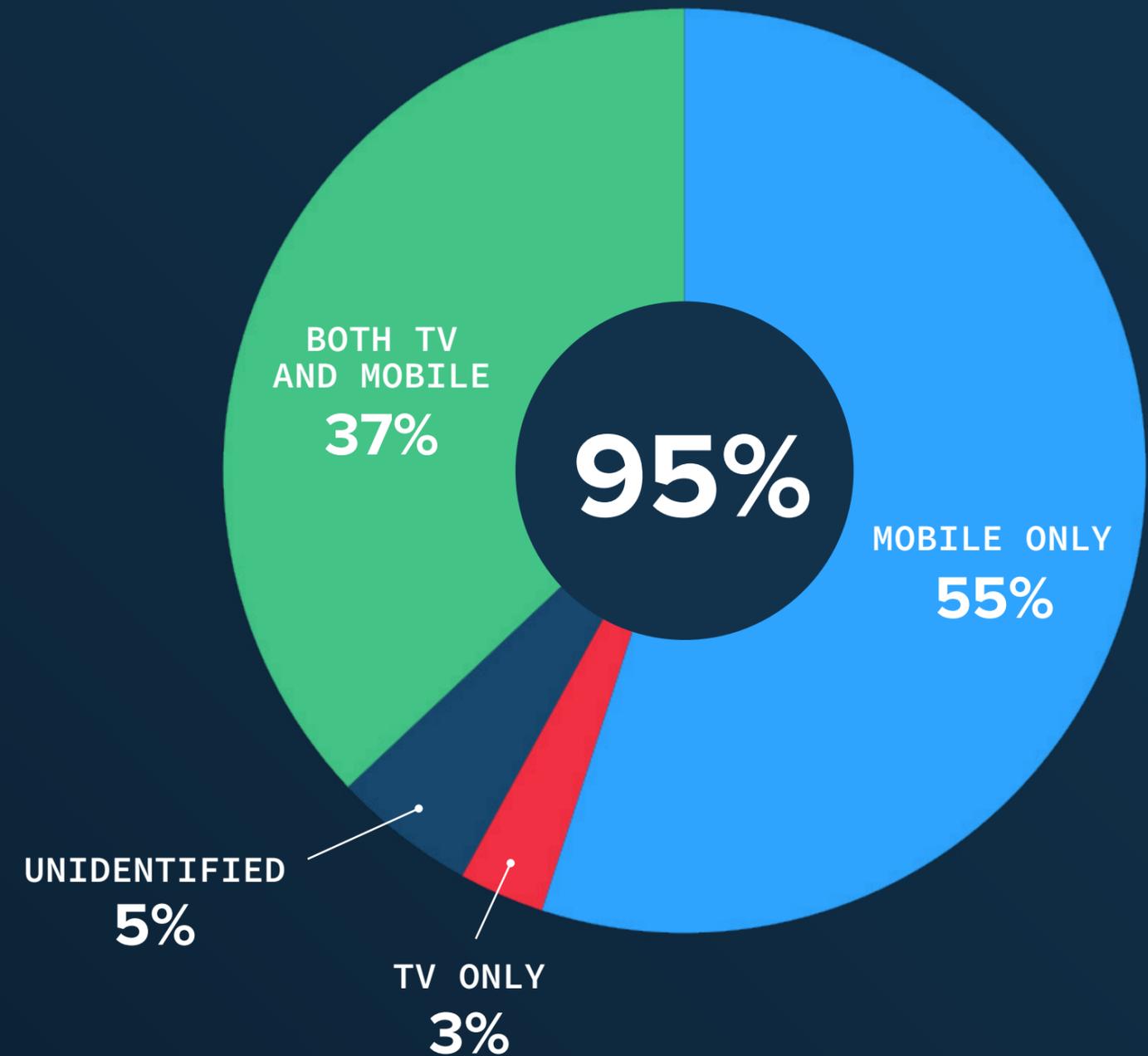


Source: TVision Panel, P2+, January 1 - December 31, 2025 | Share of Time Spent represents the total seconds visible with the app, relative to the total time spent viewing within the time period.

Few viewers watch YouTube exclusively on their TVs

YouTube is a pervasive platform. In TVision's recent analysis, 95% of panelists used the app (on mobile or on the TV) at least once within 90 days. Because most viewers who watch YouTube on their TV screens also watch on mobile there is little opportunity to extend reach by targeting YouTube viewers on their TVs. In fact, only 3% of YouTube viewers exclusively watch the app on their living room TVs.

TOTAL USER REACH FOR YOUTUBE ON MOBILE AND TV



About TVision

THE LEADER IN TV ENGAGEMENT METRICS

TVision measures what was once unmeasurable — how people really watch TV. Using cutting-edge computer vision technology, only TVision measures person-level, second-by-second TV engagement. Marketers and media sellers access TVision's TV performance metrics via its software-as-a-service platform. TVision's customers include some of the largest brands in the world, top media networks, and CTV applications. TVision's single-source panel enables measurement across both Linear TV and CTV, providing critical metrics such as Attention, Viewer Presence, Co-Viewing, and more.

Visit us at www.tvisioninsights.com



Methodology & metrics

TVision measures presence and attention for every second of programming and advertising on television. Every time a person walks into the room, our technology detects who the viewer is, where they are in the room, and what their eyes are looking at. We do all this without personally identifying individual users, and without transmitting any images or videos. TVision's data is collected from an opt-in panel of 5,000 homes across the United States and weighted to represent the country. Linear and CTV ad impressions data in this report is from July 2025 – December 2025 unless otherwise indicated.

ATTENTION INDEX

Measures how much of the content is spent with eyes on screen. 100 is the benchmark for Linear TV and CTV.

ATTENTION %

The proportion of viewing ad impressions where a person had their eyes on the screen for two or more seconds of the creative.

PRESENCE %

The proportion of viewing ad impressions where a person was in the room and visible for two or more seconds of the creative.

SHARE OF TIME SPENT

Represents the seconds visible with the content tuned relative to the total time spent for the parameters.



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