TVISION

State of Streaming

AUGUST 2025



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Streaming TV is a dominant force; marketers can take advantage

Streaming TV continues to grow and is winning. It's the prevailing pathway for video content on the living room TV; live sports and special events are increasingly found on streaming apps—a trend that has only accelerated since 2024 and will continue.

For marketers, CTV is becoming a material opportunity, and they are responding with larger investments. Streaming apps are presenting creative opportunities for media investments—traditional TV ads, pause ads, and shorter ads. But questions remain.

- What is the viewer experience like for streaming viewers?
- How do marketers find attentive viewers within niche content and among increasing distractions?
- Which live sports opportunities deliver attention and co-viewing rates at or above linear?
- How do marketers best measure and optimize their CTV campaigns?

These are some of the questions marketers and media companies must address as they embrace the streaming opportunity. TVision's data in this "State of Streaming" report helps marketers answer these questions and more with second-by-second, person-level data not found elsewhere in the industry.



John Rose
Senior Partner Emeritus and Senior Advisor | BCG

What is on America's TVs in 2025?

The average American household tuned into 4.2 apps in Q2 2025. Eight percent of households tuned into ten or more apps in the same time period.*

4.2

Average number of apps per household

PLATFORM REACH FOR STREAMING ENABLED HOUSEHOLDS

86% of households that were streaming-enabled were actively accessing streaming content. Streaming-enabled viewers also accessed cable and broadcast programming.**

86% Streaming

69% Cable

54% Broadcast

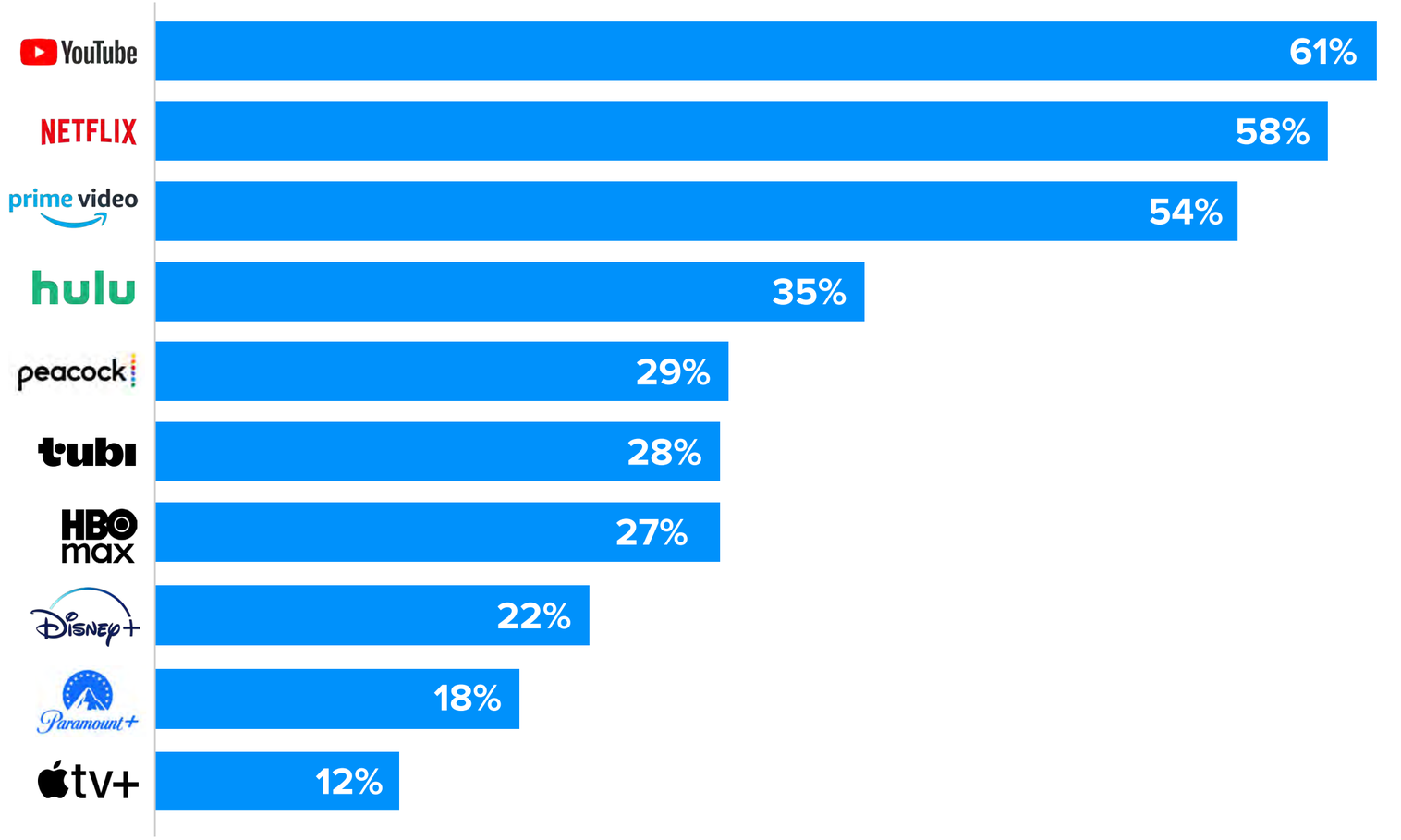


Source: *TVision panel, Q2 2025 **Source: TVision panel, June 2025

YouTube, Netflix and Amazon lead for household reach in H1 2025

HOUSEHOLD REACH FOR THE TOP STREAMING APPS*

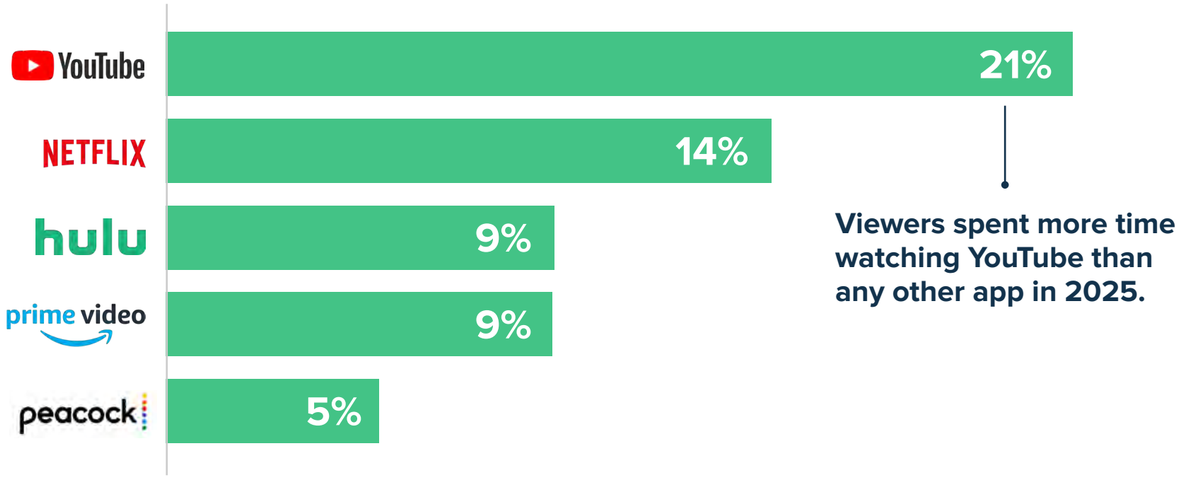
Youtube, Netflix and Amazon Prime are each in more than 50% of streaming enabled US households.



Source: TVision Panel | P2+ | January 1 - June 30, 2025 | Household Reach represents the proportion of households exposed at least once to the app within the timeframe. | *Excludes OEM owned and operated apps, such as The Roku Channel.

YouTube is the app Americans spent the most time viewing

H1 2025 SHARE OF TIME SPENT FOR STREAMING APPS



Viewers spent more time watching YouTube than any other app in 2025.



Source: TVision Panel | P2+ | January 1 - June 30, 2025

The top streaming shows & movies of H1 2025

ACCORDING TO THE TVISION POWER SCORE

Netflix content dominated the first half of 2025 with the app seeing 9 shows make the top 20 and 8 movies in the top 20 for the time period. The top overall program was Hulu's *"Paradise."* Netflix's *"Back in Action"* 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 hundred of apps and thousands of programs. The TVision Power Score factors in four key metrics: the amount of time viewers pay 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

January 1, 2025 — June 30, 2025

Streaming Shows

These are the top performing streaming shows across all apps, from January 1, 2025 — June 30, 2025

Hulu	1	PARADISE (S1)
Amazon	2	REACHER (S3)
HBO Max	3	THE PITT (S1)
Netflix	4	THE FOUR SEASONS (S1)
Netflix	5	ADOLESCENCE (S1)
Netflix	6	ZERO DAY (S1)
Netflix	7	SIRENS (S1)
Netflix	8	THE RESIDENCE (S1)
Netflix	9	RUNNING POINT (S1)
Netflix	10	THE NIGHT AGENT (S2)
Paramount+	11	LANDMAN (S1)
AppleTV	12	SEVERANCE (S2)
AppleTV	13	YOUR FRIENDS & NEIGHBORS (S1)
AppleTV	14	THE STUDIO (S1)
Paramount+	15	1923 (S2)
Netflix	16	MISSING YOU (S1)
Netflix	17	BLACK MIRROR (S7)
Amazon	18	THE BETTER SISTER (S1)
Peacock	19	POKER FACE (S2)
Hulu	20	GOOD AMERICAN FAMILY (S1)

Streaming Movies

These are the top performing streaming movies across all apps, from January 1, 2025 — June 30, 2025

Netflix	1	BACK IN ACTION
Amazon	2	YOU'RE CORDIALLY INVITED
Netflix	3	NONNAS
Peacock	4	CONCLAVE
Netflix	5	THE ELECTRIC STATE
Netflix	6	STRAW
Netflix	7	KINDA PREGNANT
Netflix	8	THE LIFE LIST
Peacock	9	WICKED: SING-ALONG
Netflix	10	HAVOC
Amazon	11	G20
HBO Max	12	TRAP
AppleTV	13	FOUNTAIN OF YOUTH
Peacock	14	TWISTERS
Disney+	15	MOANA 2
Netflix	16	TRAINWRECK: POOP CRUISE
HBO Max	17	BEETLEJUICE BEETLEJUICE
Paramount+	18	STAR TREK: SECTION 31
Disney+	19	DEADPOOL & WOLVERINE
Netflix	20	CARRY-ON

TVision Panel | P2+ | 1/1/25 - 6/30/25

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

Original content captures 8.5% more attention than library content on streaming

Original content—the content that is first released on streaming platforms—captures significantly greater attention from audiences than library content. Library content includes programming that ran elsewhere—on streaming or linear—first. It is likely that viewers make plans to intentionally find and watch original content, whereas library content may serve as familiar background television for households.

ORIGINAL CONTENT PERFORMS BETTER FOR ATTENTION THAN LIBRARY CONTENT



Source: TVision panel | P2+ from January 1, 2025 - June 30, 2025
*Original content is new streaming-first content and library content that first appeared in other (typically network) locations.

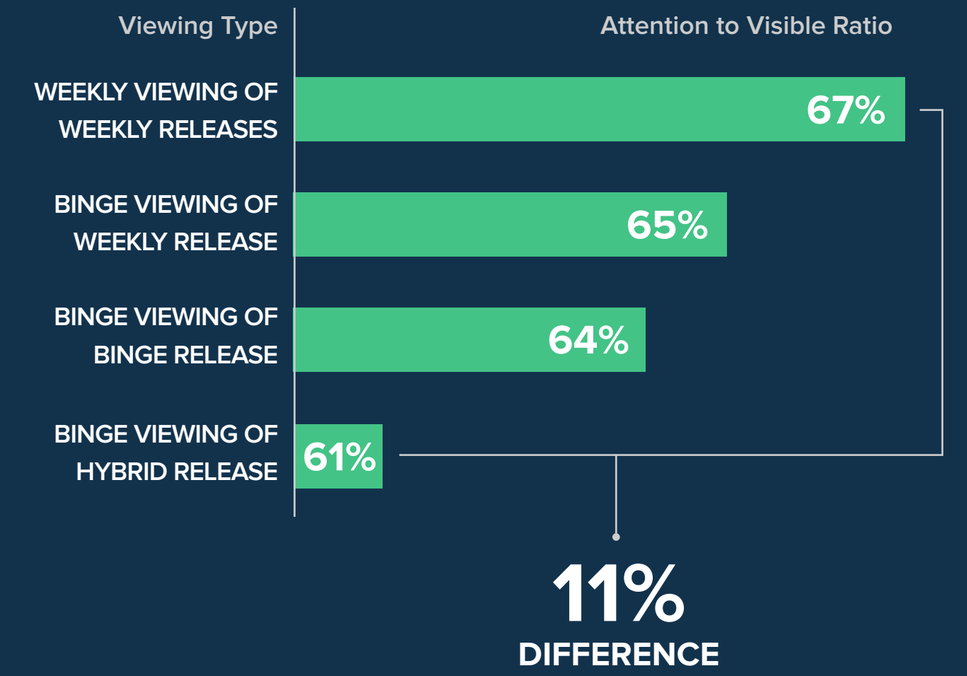


Viewer engagement with content differs based on release strategy

There are two prevailing release strategies for original streaming content—binge release and a weekly release schedule. The weekly release schedule mirrors the traditional broadcast release, but binge release is now considered the more traditional streaming release schedule. We examined attention metrics for both release styles (as well as the hybrid option) to see how release strategies impact viewer engagement with the content.

Viewers who watch weekly release content in the first week of availability pay the most attention.

ATTENTION TO VISIBLE RATIO VS. VIEWING TYPE

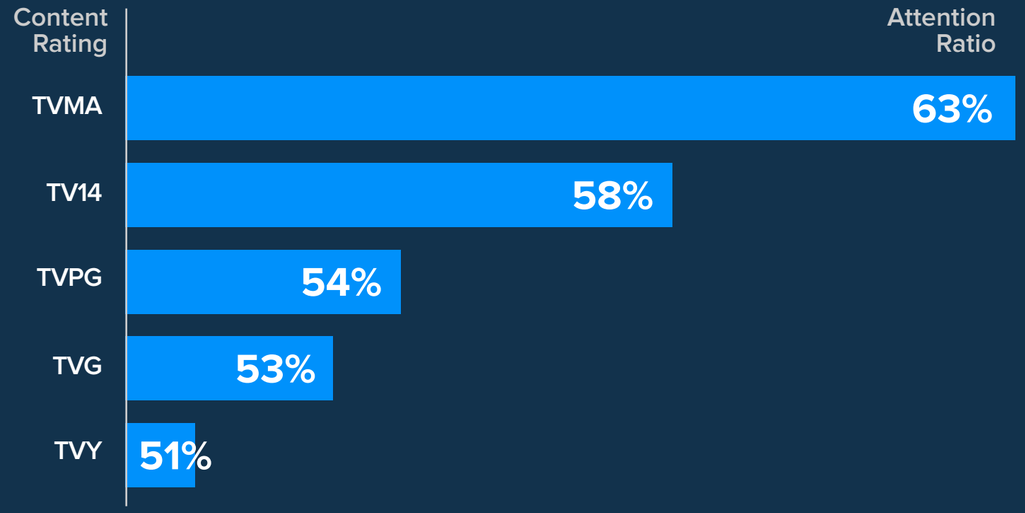


Source: TVision panel | P2+ from January 1, 2025 - June 30, 2025
**Hybrid Binge/Weekly Release includes streaming content released in batches, such as 3 episodes at once for several weeks in a row.

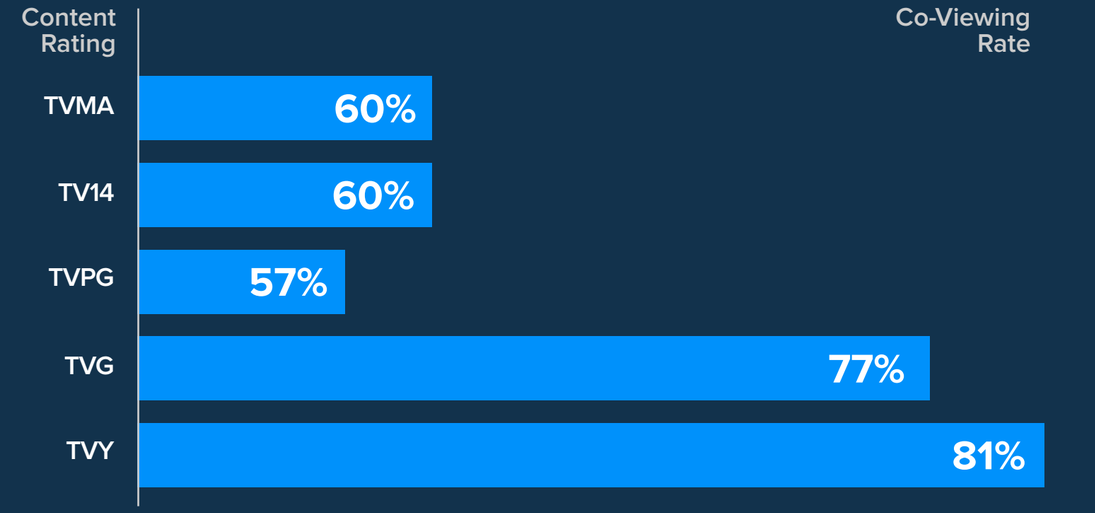
Understanding the relationship between content ratings and viewer engagement

With brand safety a chief concern for advertisers many have taken the approach of avoiding potentially sensitive content by staying away from running ads in content with mature ratings. But by excluding placements at the rating level, advertisers often miss out on safe - and highly engaging - placements. For some brands it might make sense to take a more methodical approach to identifying brand safe, and high attention placements within more mature content. On the other hand, family friendly content may deliver lower attention but co-viewing rates are significantly higher, offering the opportunity to reach additional household members.

CONTENT WITH MATURE RATINGS DELIVERS HIGHER ATTENTION



FAMILY FRIENDLY CONTENT DELIVERS MUCH HIGHER CO-VIEWING RATES



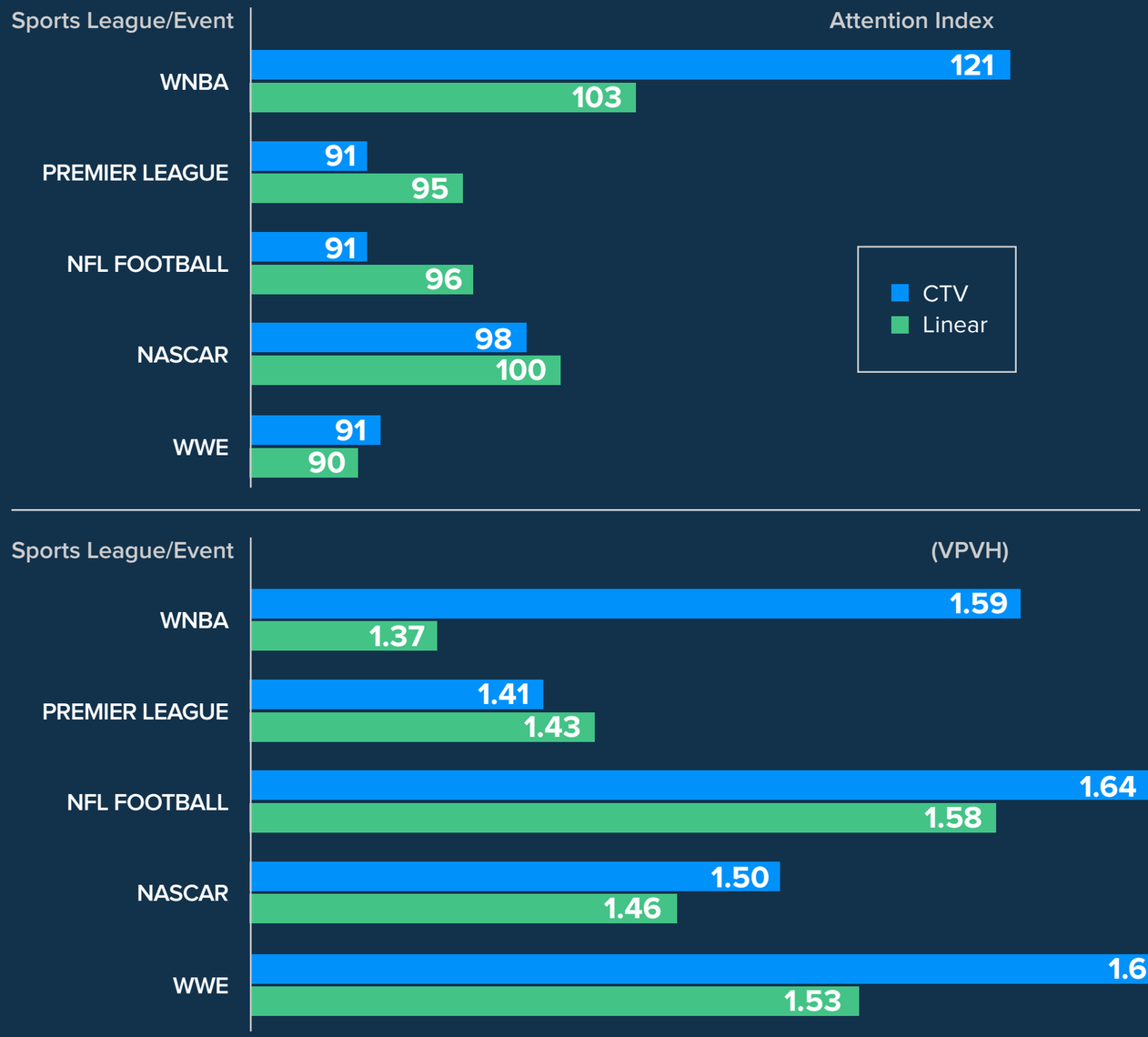
Source: TVision Panel | P2+ | January 1 2025 - June 30, 2025

Streaming live sports measurement

STREAMING SPORTS VIEWER BEHAVIOR VARIES ACROSS LEAGUES

TVision's streaming live sports measurement capability is the most comprehensive in the industry. We are measuring nearly all professional, live sports programming across the leading streaming applications. As live sports increasingly move to a streaming environment one thing is clear: the way viewers engage with streaming live sports varies across leagues. For example, WNBA viewers pay more attention to streaming games than linear. Premier League viewers co-view games on linear at a higher rate than streaming. Several factors may contribute to these numbers including the match ups on streaming or linear, time of day and viewer demographics.

SAMPLE LIVE SPORTS ATTENTION AND VIEWERS PER VIEWING HOUSEHOLD (VPVH)

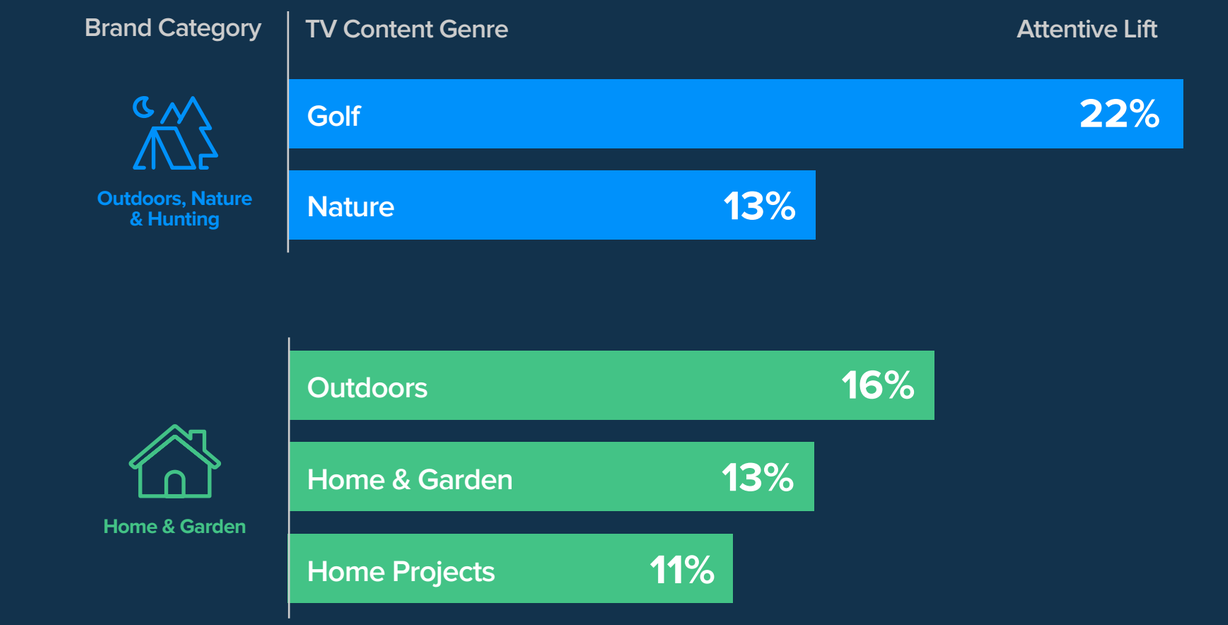


Source: TVision Panel | P2+ | January 1 2025 - June 30, 2025

Brand category and TV content genre alignment impacts attention

Contextual relevancy is one of several factors that can impact attention for advertising. Some industries see a larger bump in attention than others when it comes to brand and genre alignment. Specifically the attentive lift is high when brands in the travel and home and garden industries advertise in content with similar themes.

ATTENTIVE LIFT VERSUS TV CONTENT GENRE



Source: TVision Panel | Jan 1, 2025 - June 30, 2025 | P2+ | apps with a minimum 1% share of time spent

The brands that captured attention best in H1 2025

Ads only work if people pay attention. But capturing attention from distracted viewers is harder than ever. To best engage viewers brands must create campaigns that consider creative content, contextual relevancy, daypart, genre, app and network performance. These are the brands that broke through to capture attention best as compared to their competitors.

Apparel, Footwear and Accessories

1	Ray-Ban	59%
2	Nike	58%
3	Apple	57%
4	Vuori	56%
5	New Balance	53%
	Industry Average	52%

Automotive

1	Discount Tire	63%
2	Amazon Autos	61%
3	Acura	59%
4	CarGurus	58%
5	Big O Tires	57%
	Industry Average	51%

Consumer Products

1	Gorilla Glue	62%
2	DUDE Wipes	62%
3	Librela	59%
4	Zuke's	59%
5	Delectables	58%
	Industry Average	53%

Food & Beverage

1	Canada Dry	67%
2	Smirnoff	62%
3	Ketel One	62%
4	Tyson	61%
5	Nutella	61%
	Industry Average	52%

Health

1	AdventHealth	65%
2	Mayo Clinic	63%
3	EBGLYSS	63%
4	New Chapter	62%
5	NewYork-Presbyterian Hospital	61%
	Industry Average	52%

Home and Garden

1	TimberTech	64%
2	Kohler	64%
3	Generac Power Systems	58%
4	Sealy	57%
5	HexClad Cookware	57%
	Industry Average	52%

Retail

1	American Signature	65%
2	Nebraska Furniture Mart	62%
3	Sprouts Farmers Market	62%
4	Omaha Steaks	62%
5	Hobby Lobby	61%
	Industry Average	52%

Telecommunications

1	Spectrum	59%
2	T-Mobile for Business	58%
3	AT&T	57%
4	Metro by T-Mobile	57%
5	Visible	57%
	Industry Average	55%

Travel

1	Visit Destin-Fort Walton Beach	68%
2	San Diego Tourism Authority	65%
3	Uber	65%
4	IHG Hotels & Resorts	63%
5	MSC Cruises	63%
	Industry Average	55%

Source: Total View | P2+ | Jan 1 - June 30, 2025 | CTV only

Cosmetic/Hygene

1	Lancôme Paris	60%
2	Maybelline	59%
3	No7	59%
4	Clinique	58%
5	COVERGIRL	58%
	Industry Average	52%

Legal/Financial

1	DeVaughn James Injury Lawyers	66%
2	BMO	65%
3	Old National Bank	64%
4	Visa	64%
5	BMO Harris Bank	64%
	Industry Average	54%

Electronics/ Technology

1	Bose	64%
2	Amazon Web Services	64%
3	Google	62%
4	AT&T Business	60%
5	Apple	59%
	Industry Average	55%

Restaurants

1	Hardee's	65%
2	Zaxby's	62%
3	Little Caesars	59%
4	Whataburger	59%
5	Bojangles'	58%
	Industry Average	52%

Source: Total View | P2+ | Jan 1 - June 30, 2025 | CTV only



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 seller's 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-In-Room 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 January 2025 – June 2025 unless otherwise indicated.

ATTENTION INDEX
Measures the average amount of seconds that viewers engage with an ad or program

CO-VIEWING RATE (%)
Measures the proportion of episode or app views that occur with another viewer present for 5 or more minutes

SHARE OF TIME SPENT
Compares the amount of time spent viewing the app or program





TVISION

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