

T>>VISION

State of Streaming

January 2025

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The future of TV measurement is here.

Over the past decade, the television ecosystem has undergone transformative changes driven by the widespread adoption of streaming, beginning with the consumers move away from traditional cable, the advent and rapid proliferation of OEM delivered FAST, the rise of ad-supported subscription models, and the deluge of content options now including live-streamed sports. All of that underpinned by material advancements in measurement methodologies.

Specifically, 2024 will be remembered as the year where media companies and measurement companies alike fully embraced the power of ACR and Big Data at scale. The accompanying shift from traditional measurement methodologies has opened new opportunities to leverage technology to better understand the evolving consumer experience with Television. A terrific example of this is the incorporation of innovative metrics, particularly attention measurement, which is enabling media companies and advertisers to leverage another valuable tool in order to evaluate and compare ad performance across platforms.

The TVision State of Streaming report offers a compelling snapshot of the industry's current dynamics. Notably, TVision's analysis of ad time distribution across streaming apps (Page 8) provides invaluable insights into inventory availability and scarcity providing an emerging opportunity for advertisers to better evaluate investment opportunities as the 2025 Upfronts approach.

The year ahead promises even greater advancements for our rapidly evolving industry. I for one can't wait to see it all unfold.



Julian Zilberbrand
Global Head of Data Solutions
at LG Ad Solutions

What was on America's TVs in 2024?

The average American household tuned into 3.9 apps in Q3 2024. 8% of households tuned into ten or more apps in the same time period.*

3.9
Average number of apps per household

▶ Platform reach for streaming enabled households

By the end of 2024, 90% of households that were streaming-enabled were actively accessing streaming content. Streaming-enabled viewers also accessed cable and broadcast programming.**

90%
Streaming

72%
Cable

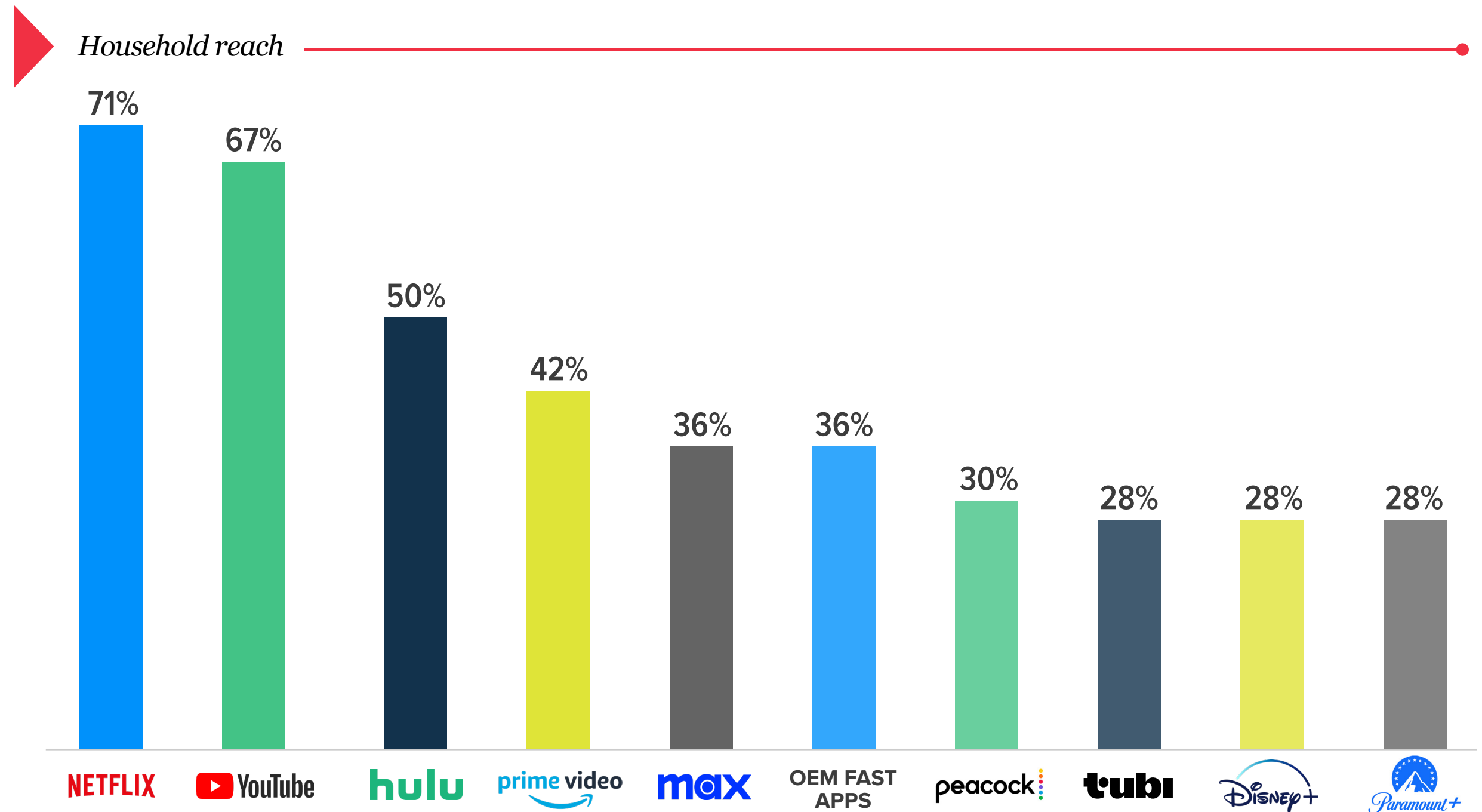
67%
Broadcast

*TVision Panel | Q3 2024 **TVision Panel | Nov 2024



Two thirds of American households viewed Netflix and YouTube in 2024

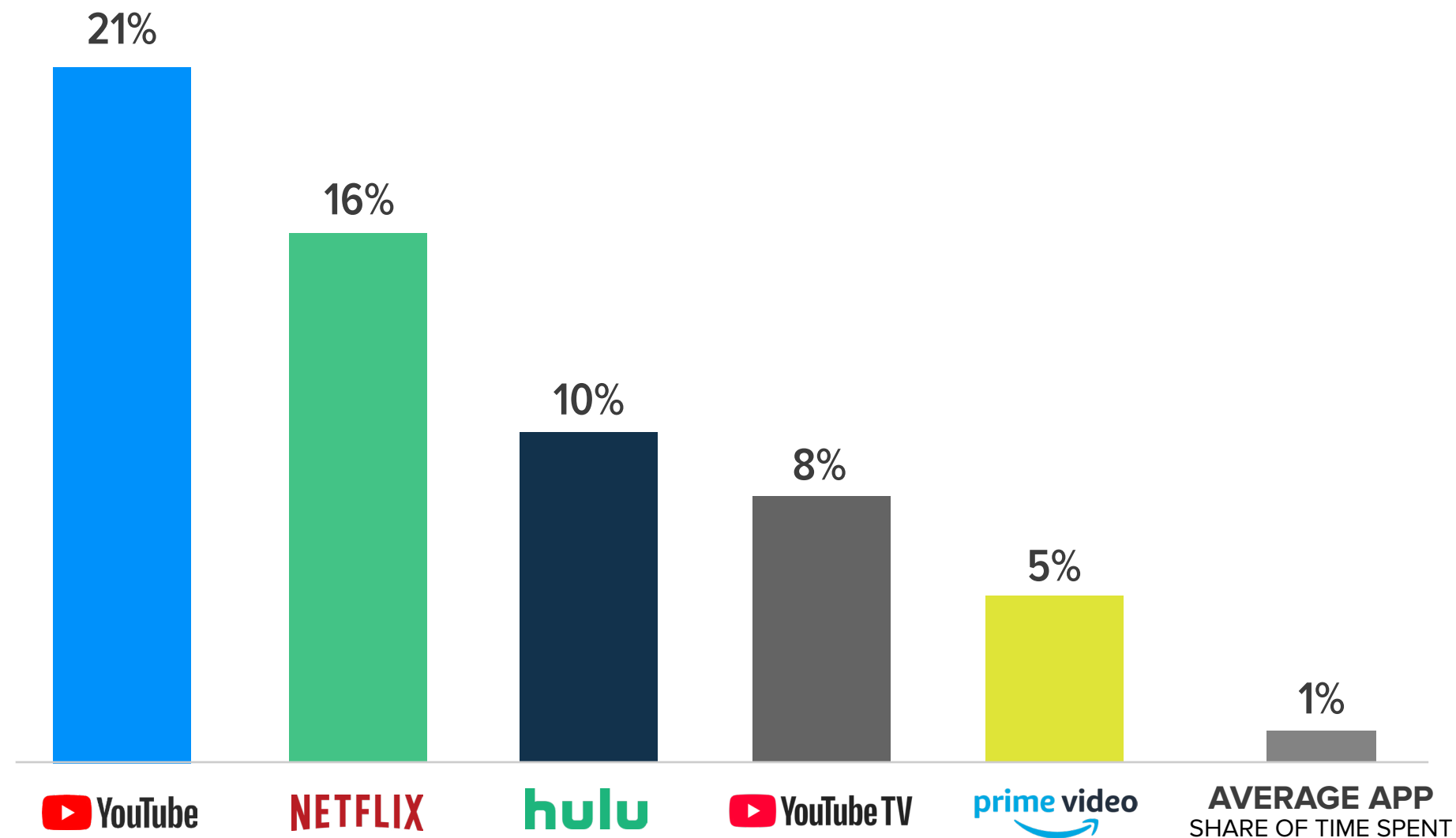
Netflix and YouTube maintained their dominance, far outpacing all other apps for Household Reach. There is increasing stability among the top streaming apps. The top ten apps in 2024 are the same ten apps that were most prevalent on American TVs in 2023.



Viewers spent the most time with YouTube in 2024

Viewers spent more time watching YouTube than any other app in 2024. The two Google properties — YouTube and YouTubeTV combined to capture almost 30% of all streaming viewing time in the year.

Share of time spent

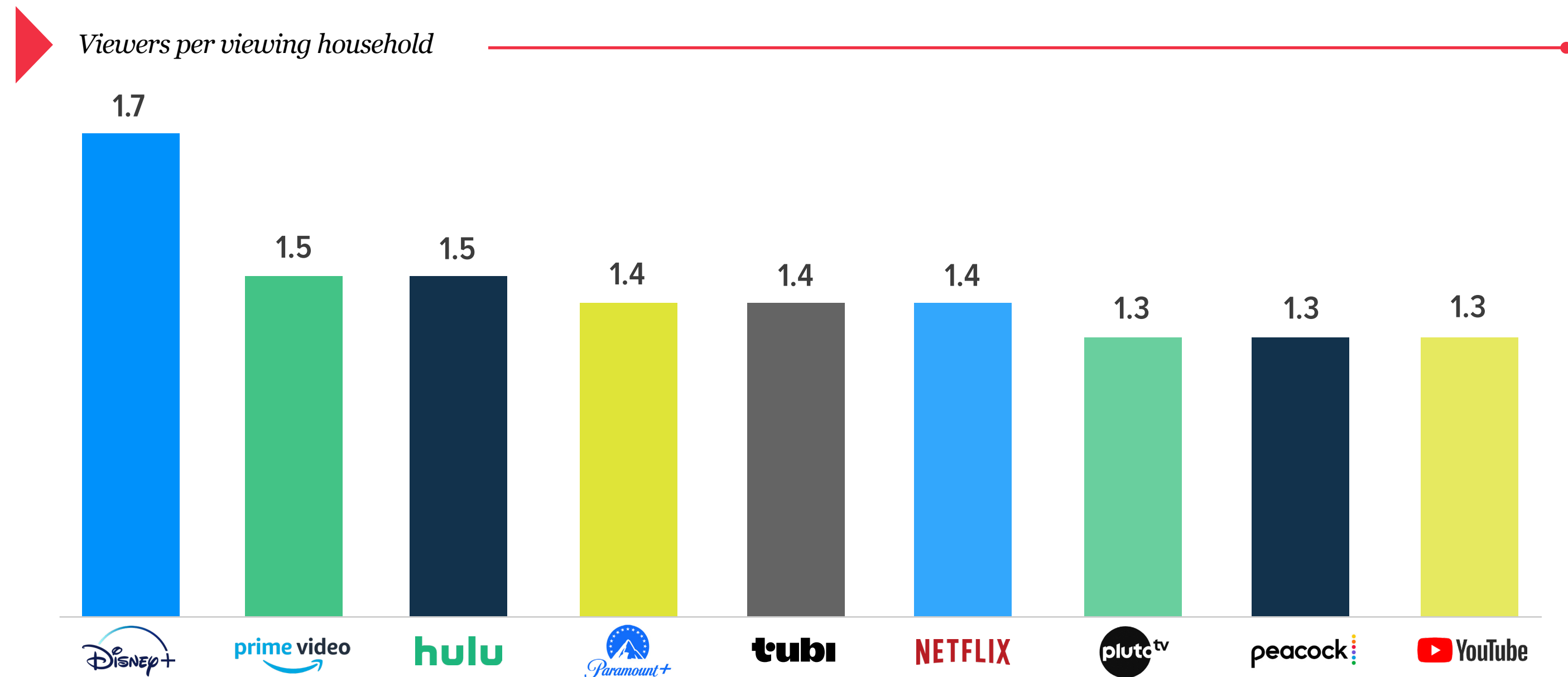


TVision Panel | P2+ | January 1 - December 5, 2024. Share of Time Spent represents the total seconds visible with the app, relative to the total time spent viewing within the time period.



Family-friendly apps maintain higher than average co-viewing rates

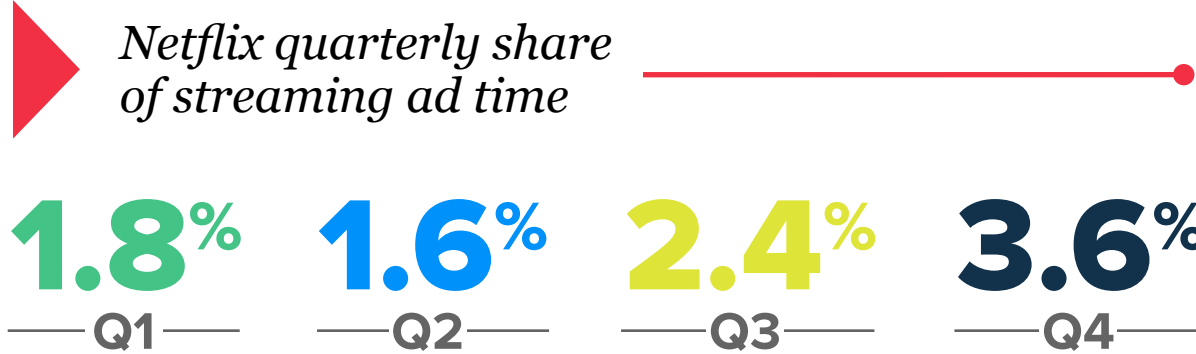
With Viewers Per Viewing Household (VPVH) advertisers and apps are able to understand the true reach of an impression. For many of the major apps, and especially apps that offer large libraries of family-friendly content, the VPVH is often much higher than the industry-accepted standard of 1.2.



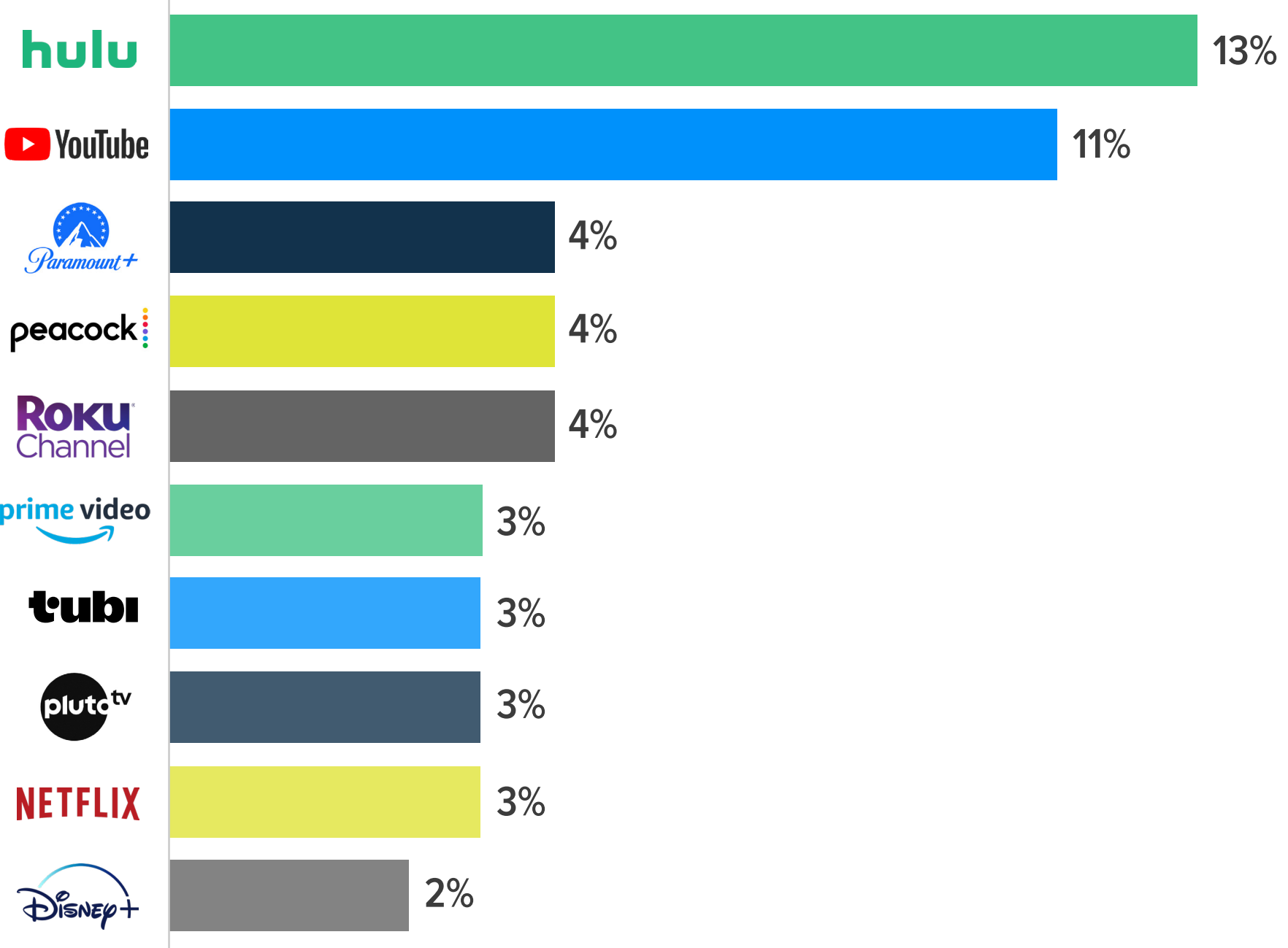
Hulu and YouTube had the largest share of streaming ad time in 2024

Hulu topped the list for share of streaming ad time and its share is growing. Our data shows that Hulu increased its share of ad time 20% from Q1 to Q4.

While Netflix’s share of streaming ad time was 3% for all of 2024, quarterly data shows that it doubled its ad share from Q1 to Q4 2024. The streaming giant recently reported 70 million ad-tier subscriptions and more than 50% of new subscribers sign up for the ad-tier model. This growth likely fueled Netflix’s increase in ad time.

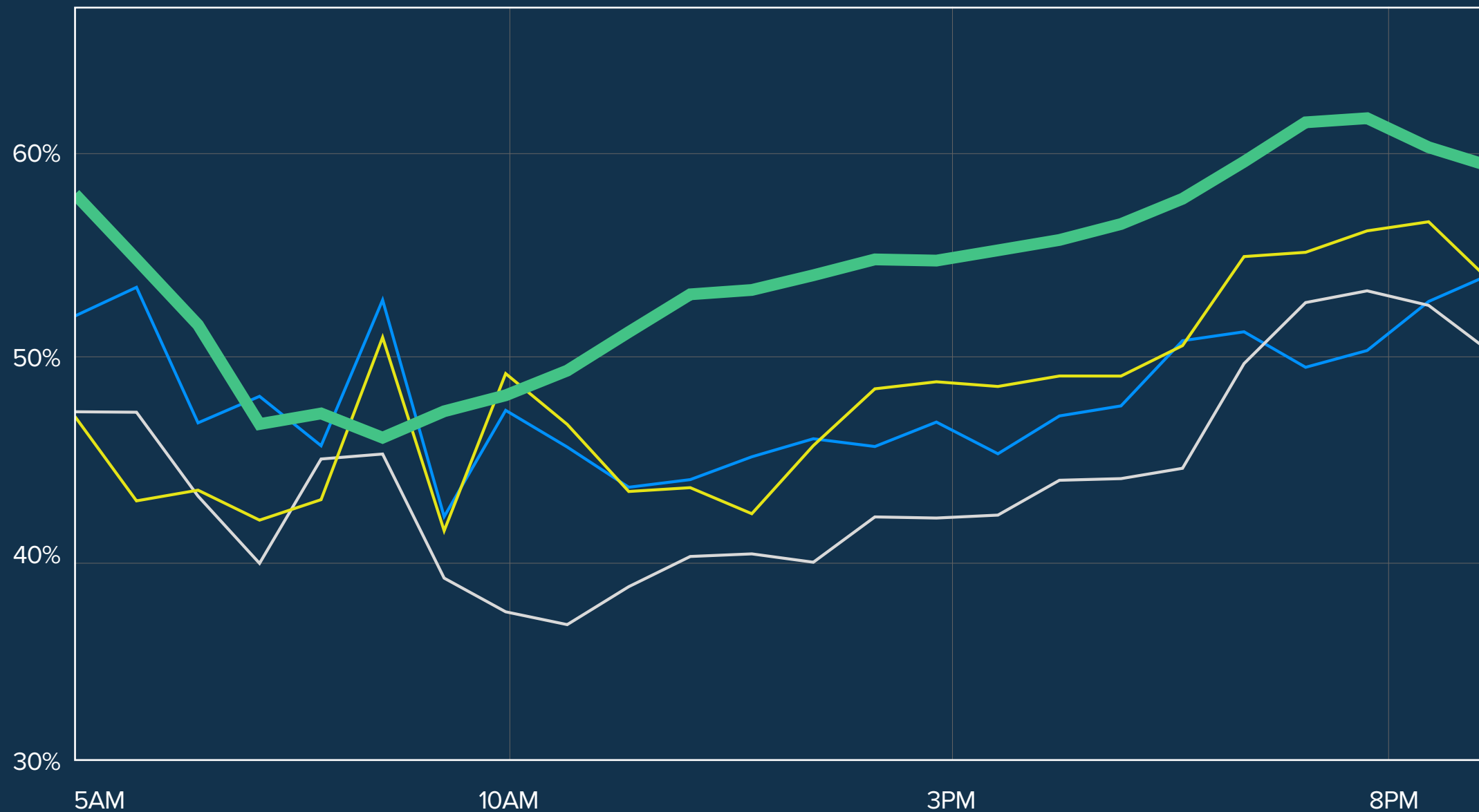


Top ten AVOD and FAST apps by share of ad time in 2024



Adult attention varies depending on the presence of children

CTV attention to visible ratio by household type | Adult 18+



When kids are present, attention from adult viewers is lower than when no children are present. Attention from all viewers, whether children are present or not, increases as the day goes on and peaks in the evening hours.

- Households without kids
- Households with only teenagers
- Households with all kids under 14
- All other households with kids

Premium content engages households with kids at a higher rate

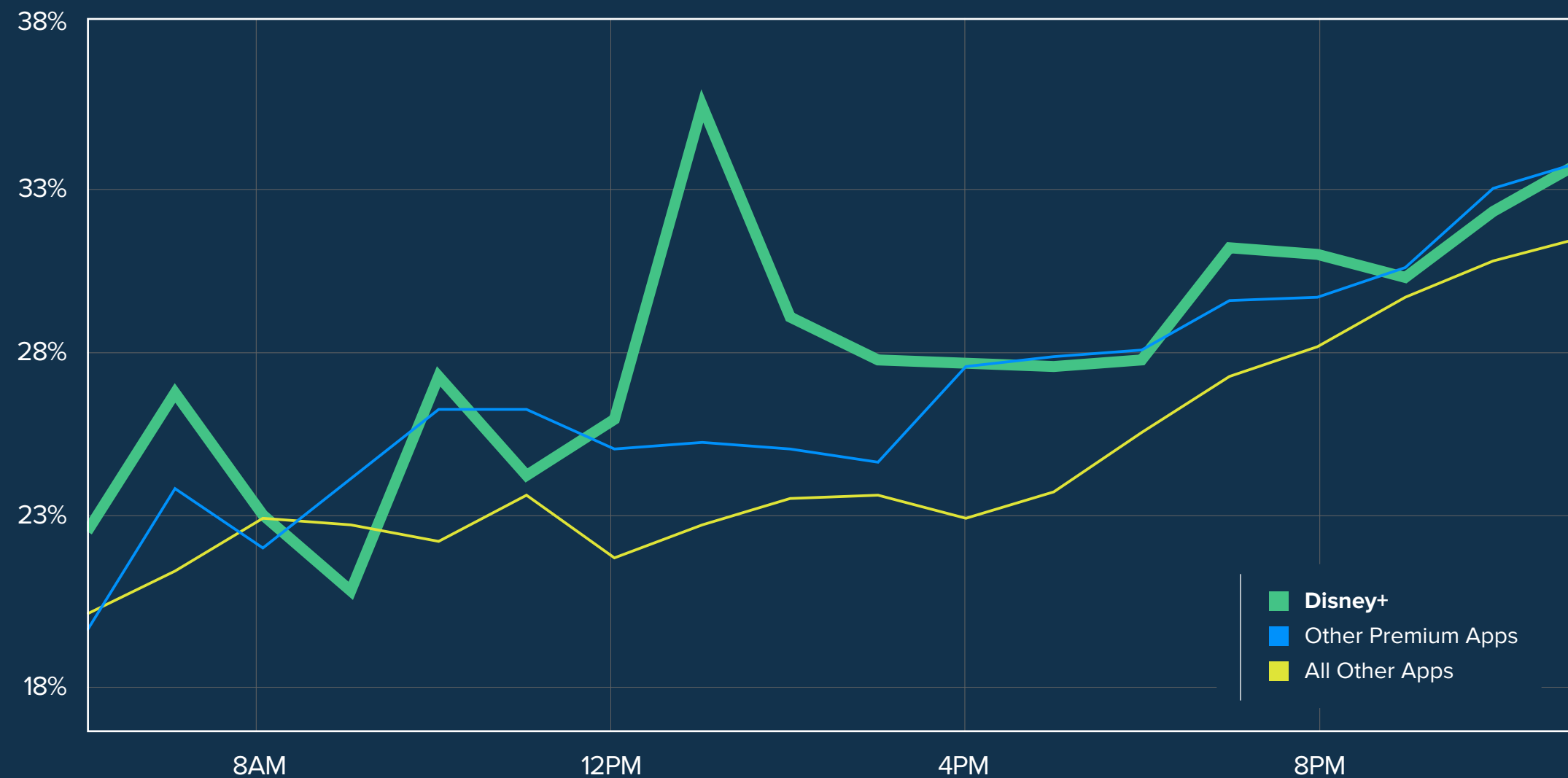


While it's true that households with kids pay less attention overall, when those households are engaging with premium content on family-friendly apps they pay more attention.

Households with kids pay 4% more attention to Disney+ than other apps

We compared the average attention of households with kids to Disney+, one of the leaders in family-friendly programming, against their attention to all other streaming content and we found that across the board viewers paid more attention to Disney+. Family-friendly apps that offer premium content are able to overcome potential distractions to engage these audiences.

▶ *Households with kids' attention to Disney+ compared to other apps*

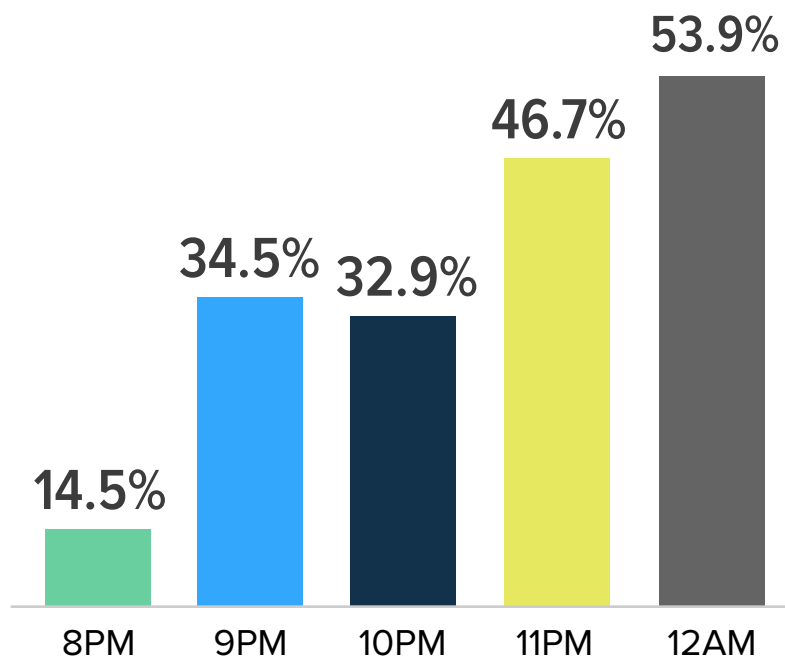




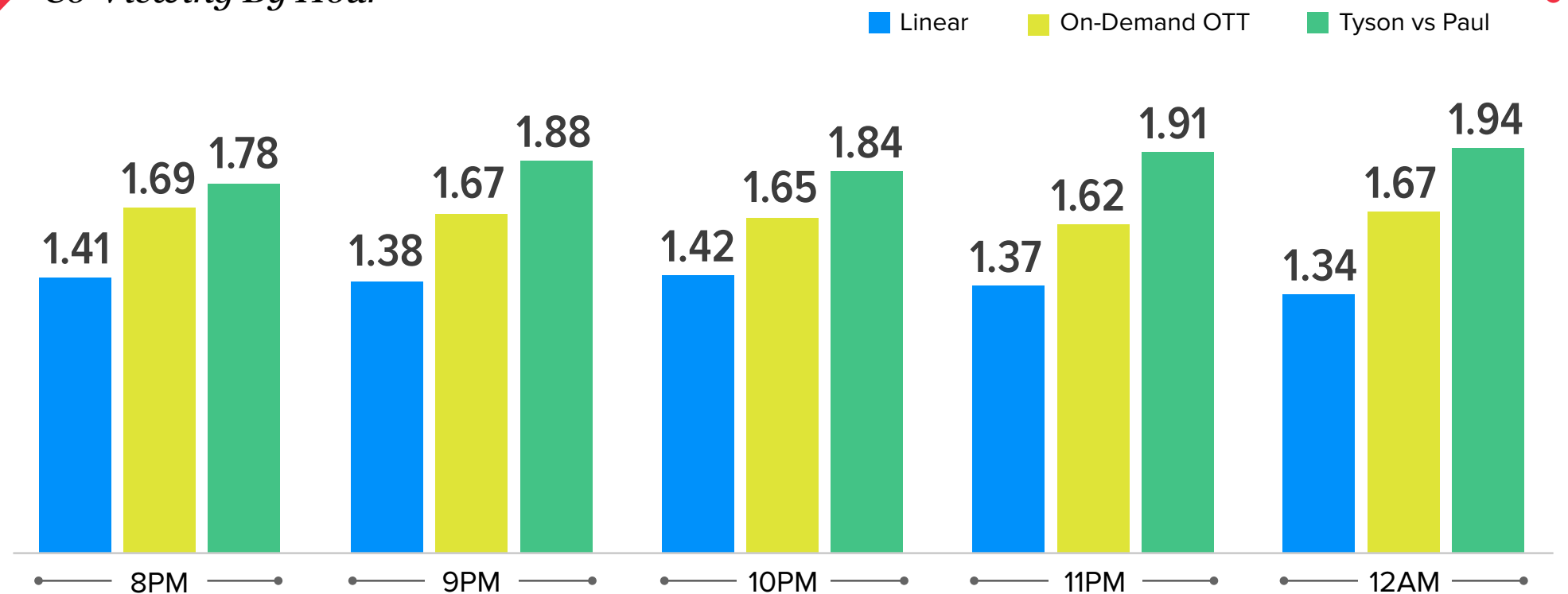
Netflix's "Tyson vs Paul" reveals the potential for streaming live sports

In November 2024, Netflix hosted the most watched streaming live sports event ever — the fight between Mike Tyson and Jake Paul. Using TVision data, Netflix reported **108 million viewers** tuned in to the event. By the final hour of the match, more than half of the entire TV viewing audience was tuned into the fight. Audiences co-viewed the event in large numbers, with almost two viewers per viewing household tuning into the final hour of the match, suggesting this was a major group watching event. For point of comparison the 2024 Super Bowl also recorded a co-viewing factor of 2. The event stands as a strong case study for future opportunities in streaming live sports.

▶ *Percent of total TV viewing audience by hour*

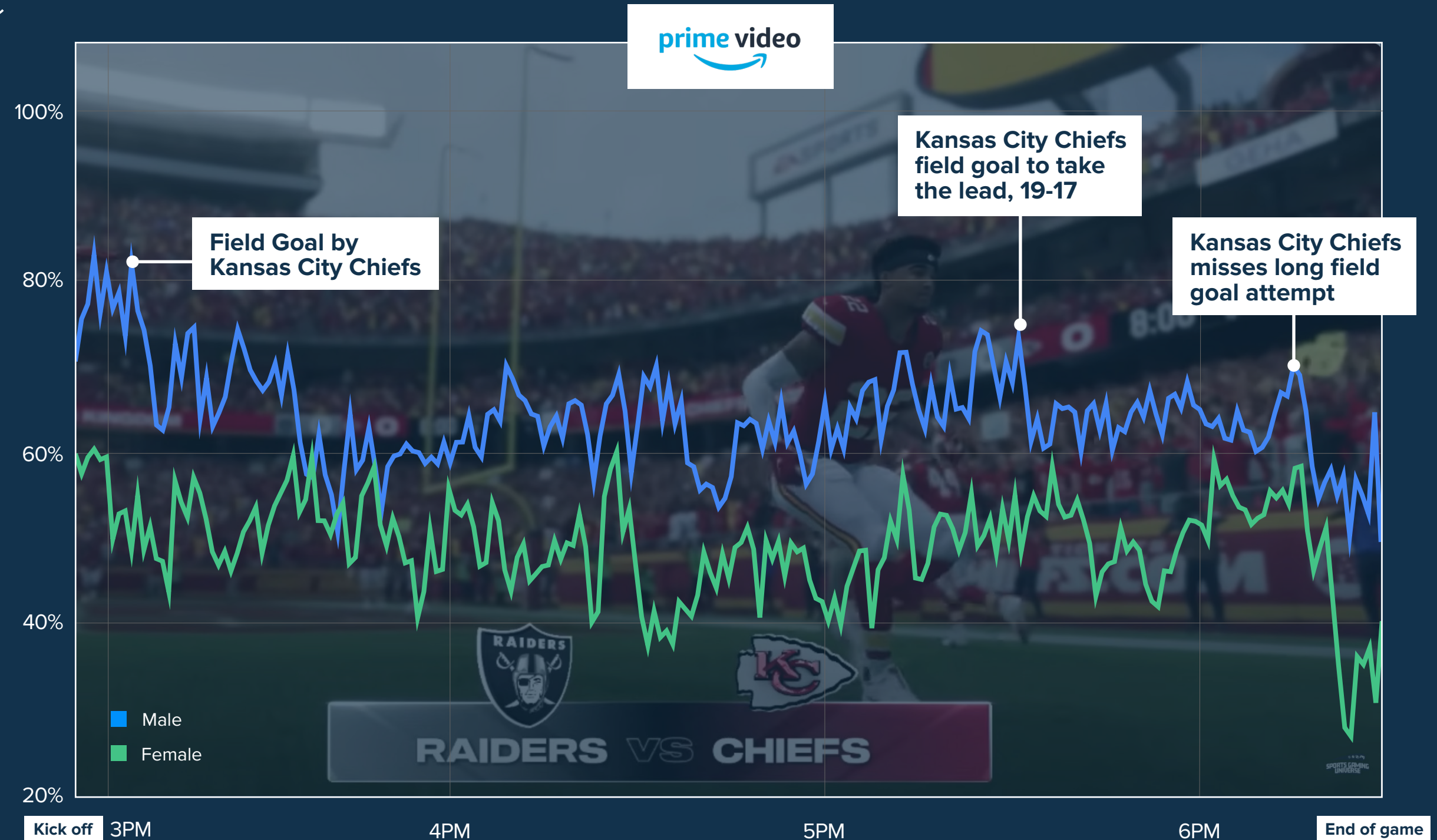


▶ *Co-Viewing By Hour*



NFL Football second by second attention on Amazon Prime

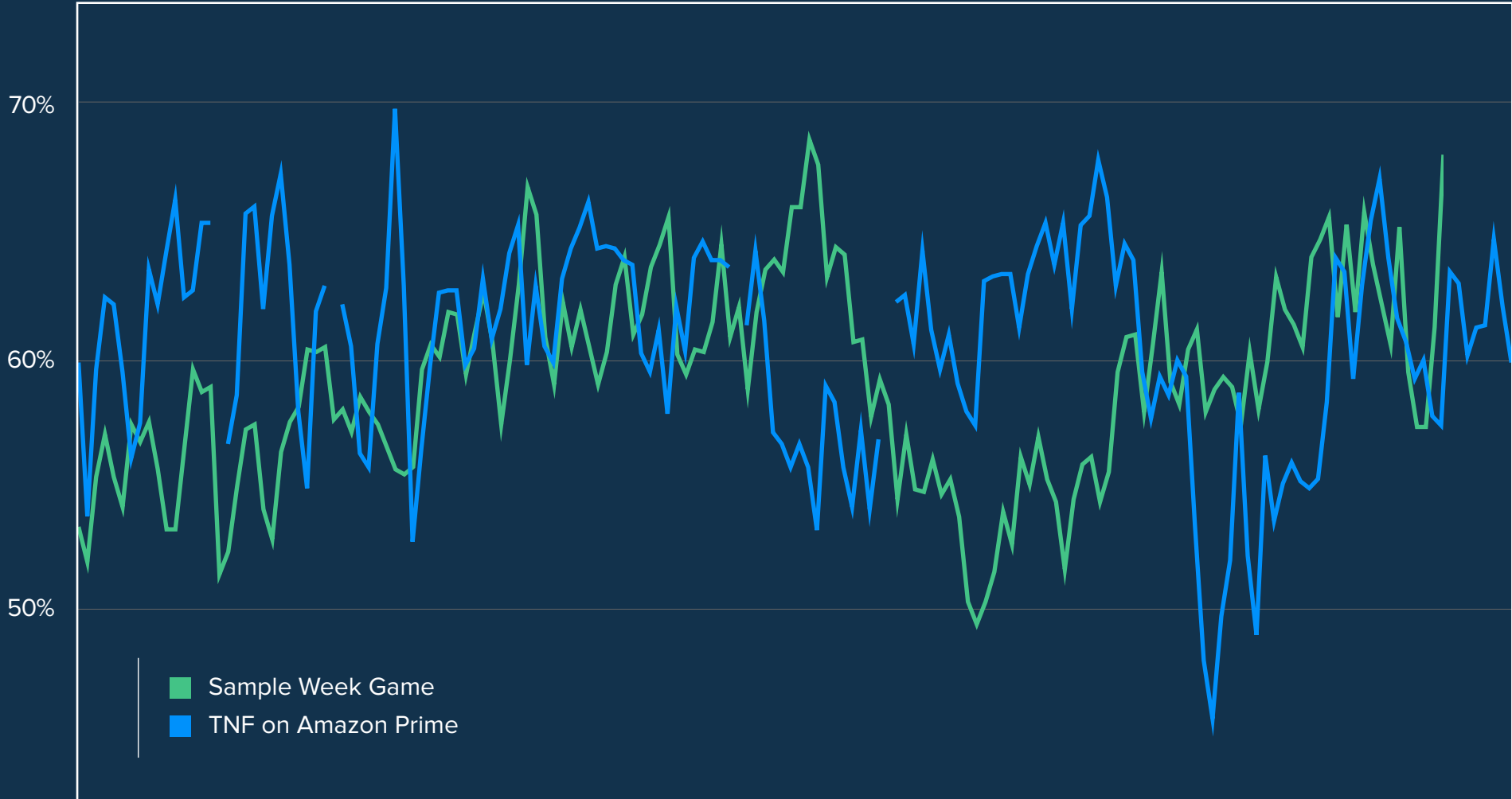
As sports increasingly move to the streaming environment we took a second-by-second look at one game to see how viewers are paying attention. Just as we see with major live sports events aired in linear environments, for Amazon Prime's Black Friday NFL game, men paid more attention than women in general. Big game moments brought viewers eyes to the screen, as evidenced by the peaks in attention at critical moments in the game. A close and competitive game, featuring lead changes and solid opportunities by both teams meant that viewer attention throughout the game remained consistently high.



Viewer engagement with streaming live sports is similar to linear

▶ *Viewer attention to live sports ebbs and flows based on game action in both environments*

ATTENTION TO VISIBLE INDEX



“Streaming-exclusive” live sports events increased in 2024, and we expect the trend to continue with more games and special events moving to streaming-only environments in 2025. Here we took a look at how streaming live sports audiences compare to linear viewing live sport audiences. We analyzed two sample games - one from Amazon Prime’s Thursday Night Football (TNF) and a nationally televised linear game from the same week. We can see that the behaviors of streaming sports viewers mirror those of linear sports viewers in that attention is higher overall, peaks at times of important plays and the excitement on the field will typically dictate overall attention.

ATTENTION INDEX

62%

TNF, Week 6 on Amazon Prime

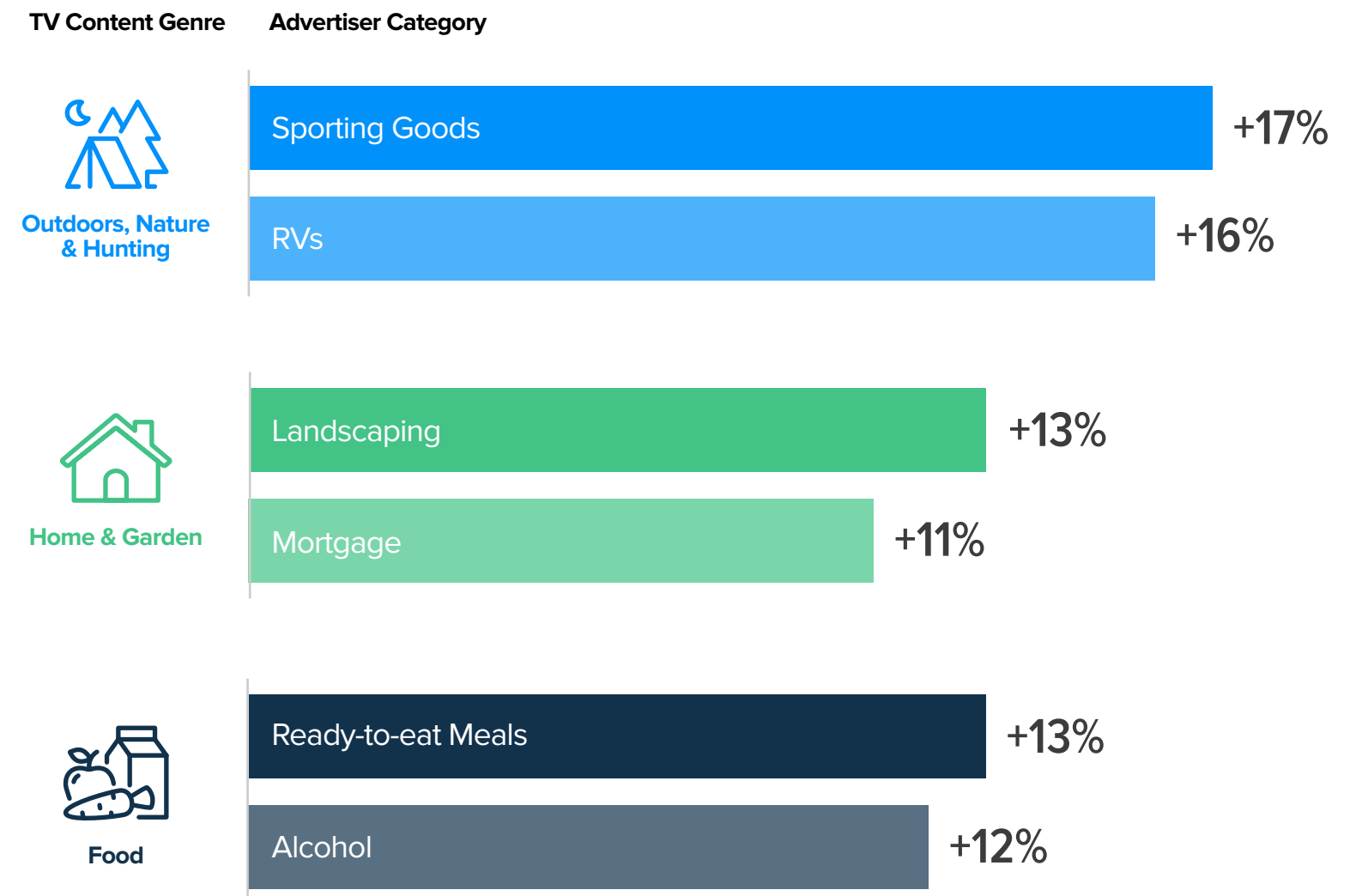
59%

All NFL Football

Contextual relevancy improves attention

FreeWheel used TVision data to understand the relationship between attention and content relevancy. Brand categories saw significant attentive lift when their ads ran in corresponding content. For example, the Sporting Goods category saw a 17% increase in attention when ads ran in Outdoor, Nature and Hunting programming, compared to all other programming. For more information on the viewer ad experience, check out the full report from FreeWheel.

As seen in the  FreeWheel Viewer Experience Lab Report:
Making the Ad Experience More Relevant



The top streaming shows & movies of 2024

According to the TVision Power Score

Amazon notched the top streaming show and movie in 2024, according to the TVision Power Score. A significant portion of Amazon Prime viewers watched “Fallout” and “Road House” and they paid high attention. More Netflix shows (8) and movies (12) made the top 20 for their category than any other app.

Scores are powered by TVision’s industry-leading CTV panel. The analysis includes how viewers are engaging with content over 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 was chosen to enable a neutral look at the quality of programming and its unique, inherent ability to draw in viewers — regardless of the scale of the platform, or the program’s release schedule.

THE TVISION POWER SCORE

January 1, 2024 — December 31, 2024

Streaming Shows

These are the top performing streaming shows across all apps, from January 1, 2024 — December 31, 2024

- Amazon 1 FALLOUT (S1)
- Netflix 2 THE PERFECT COUPLE (S1)
- Amazon 3 REACHER (S2)
- Netflix 4 BRIDGERTON (S3)
- Netflix 5 GRISELDA (S1)
- Netflix 6 NOBODY WANTS THIS (S1)
- Netflix 7 THE GENTLEMEN (S1)
- Hulu 8 ONLY MURDERS IN THE BUILDING (S4)
- Netflix 9 FOOL ME ONCE (S1)
- Disney+ 10 AGATHA ALL ALONG (S1)
- Amazon 11 THE BOYS (S4)
- Netflix 12 MONSTERS (S1)
- Amazon 13 MR. & MRS. SMITH (S1)
- AppleTV 14 PRESUMED INNOCENT (S1)
- Netflix 15 3 BODY PROBLEM (S1)
- AppleTV 16 PALM ROYALE (S1)
- Disney+ 17 PERCY JACKSON AND THE OLYMPIANS (S1)
- AppleTV 18 MASTERS OF THE AIR (S1)
- Hulu 19 THE BEAR (S3)
- Hulu 20 SHÖGUN (S1)

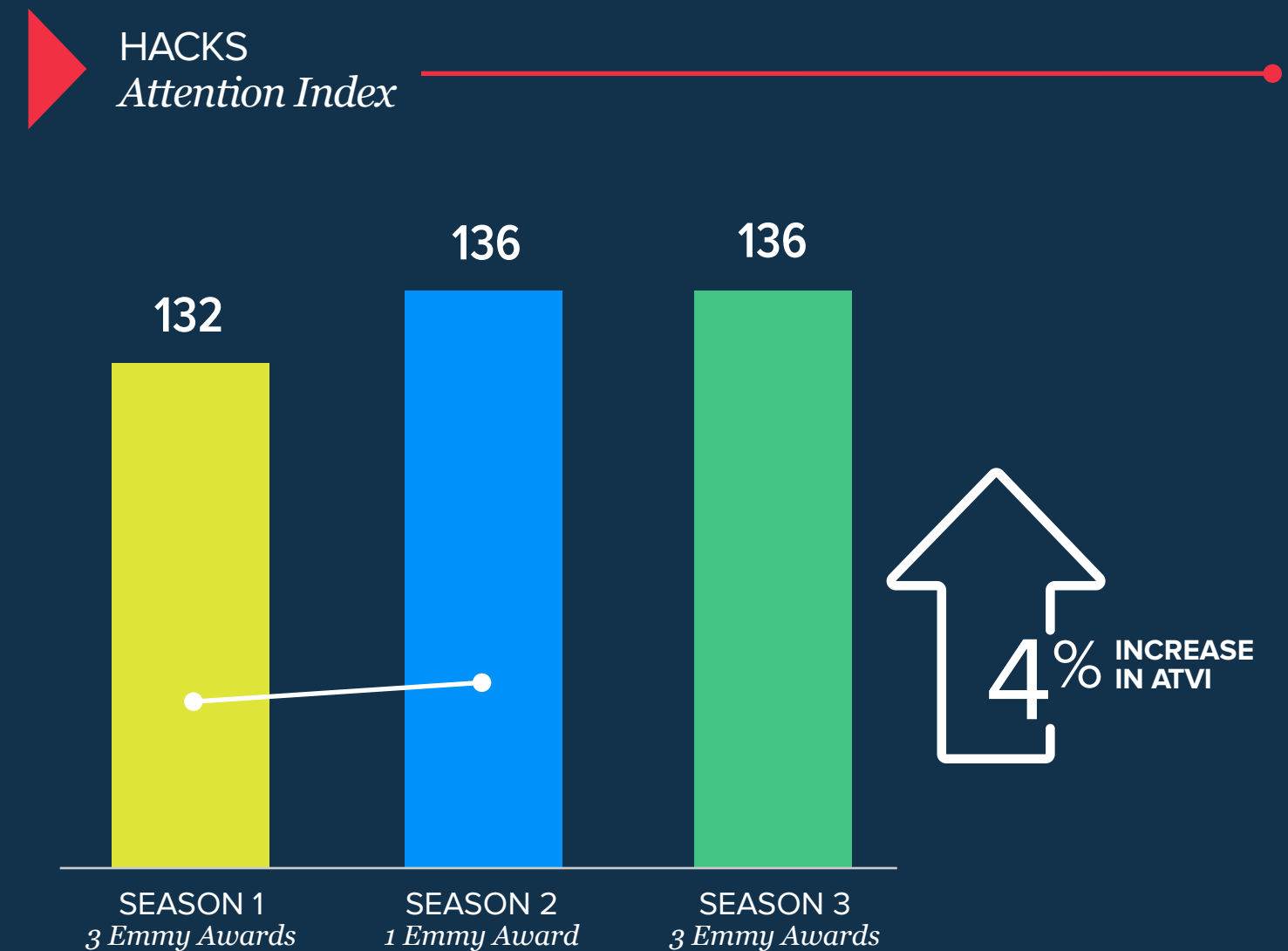
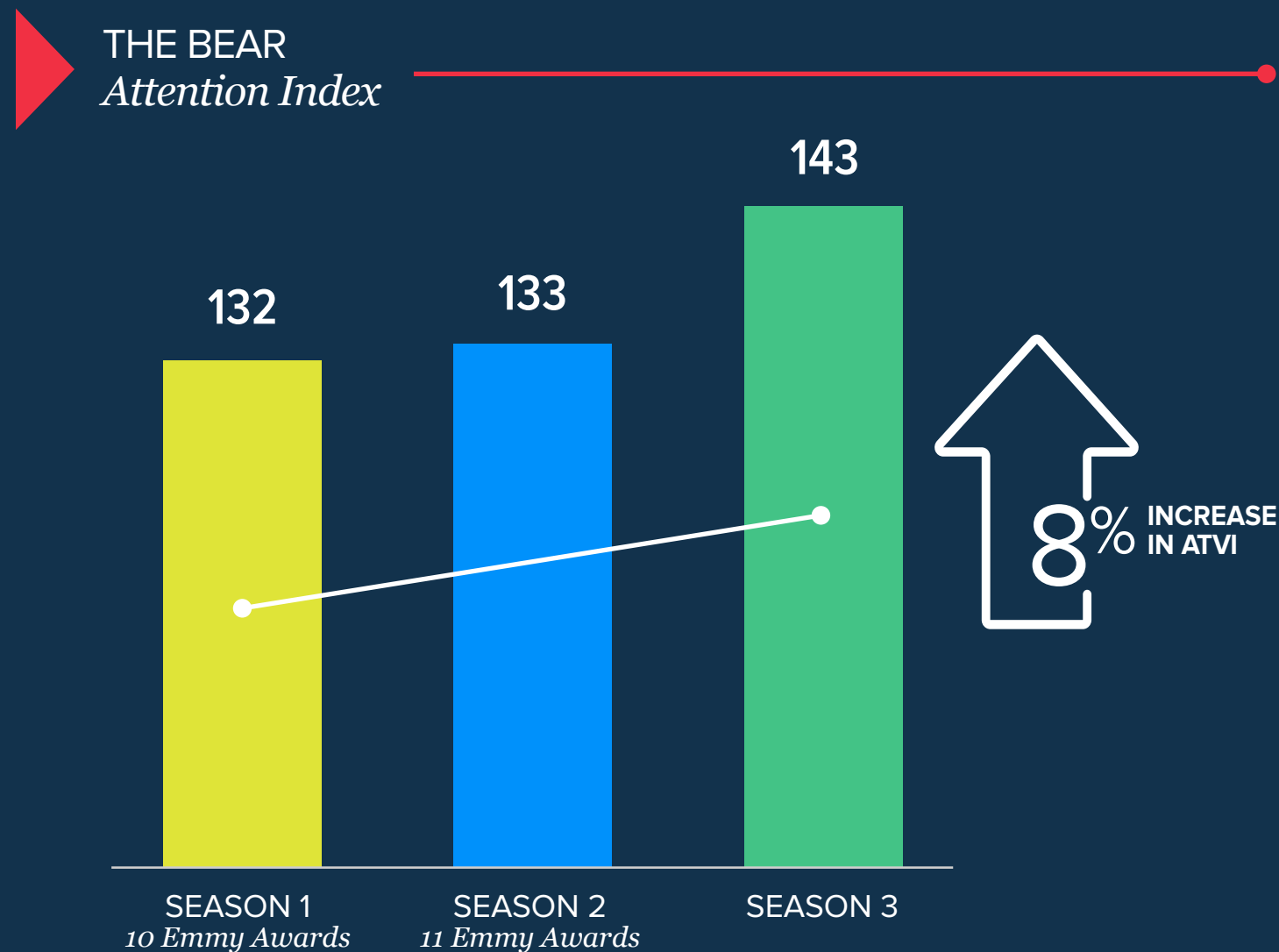
Streaming Movies

These are the top performing streaming movies across all apps, from January 1, 2024 — December 31, 2024

- Amazon 1 ROAD HOUSE
- Netflix 2 THE UNION
- Netflix 3 UNFROSTED
- Netflix 4 HIT MAN
- Netflix 5 LIFT
- Netflix 6 MOTHER OF THE BRIDE
- Netflix 7 BEVERLY HILLS COP: AXEL F
- Netflix 8 THE SUPER MARIO BROS. MOVIE
- Max 9 WONKA
- Amazon 10 JACKPOT!
- Netflix 11 DAMSEL
- Netflix 12 REBEL RIDGE
- Peacock 13 MIGRATION
- Disney+ 14 MOANA
- Disney+ 15 TAYLOR SWIFT | THE ERAS TOUR (TAYLOR'S VERSION)
- Amazon 16 THE IDEA OF YOU
- YouTube 17 FACE YOUR BIGGEST FEAR TO WIN \$800,000
- Netflix 18 THE ROAST OF TOM BRADY
- Netflix 19 ATLAS
- Netflix 20 IRISH WISH

Emmy nods can lead to higher attention for critically acclaimed shows

The Bear (Hulu) and Hacks (HBO/Max) both experienced an increase in attention to new seasons following their Emmy wins. The recognition by the academy helped bring in larger audiences for both shows and those larger audiences paid more attention to later seasons than viewers of season 1.



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 2024 – December 2024 unless otherwise indicated.

Attention Index/Attention to Visible Index

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

Attention (%)

Measures the percentage of ad impressions where a viewer was watching the TV screen for two or more seconds

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



The logo features the word "TVISION" in a white, sans-serif font. The letter "V" is stylized with two chevron-like shapes pointing right, one in red and one in blue. The background is a dark blue gradient with a pattern of red lines forming a series of nested, elongated diamond shapes that create a sense of depth and movement.

TVISION

www.tvisioninsights.com