

Fast Facts



What you need to know about new & emerging trends, platforms or technology

Bigger, Bolder & More Ad-Supported 25 Streaming Trends That Are Impacting Marketing Plans in 2025

March 2025





The 'mainstreaming' of ad-supported streaming is ushering in more opportunities

Welcome to our third annual streaming trends report, now bigger and bolder than ever with an emphasis on **25 trends that are shaping the streaming landscape!**

As a follow-up to our previous reports, [Advertising Accelerated](#) and [Setting the Stage](#), we're providing the latest updates on **streaming behaviors** and diving deeper into **device and platform usage**, the importance of **quality content** and the continued growth of **ad-supported options**.

The mainstreaming of ad-supported streaming has cemented its role as a **cornerstone of multiscreen TV and premium video strategies** and is driving innovation across **live sports, retail media** and **interactive formats** which creates new opportunities for brands to connect with engaged audiences.

As streaming claims a larger share of viewership, cross-platform strategies are more important than ever. **Dive in to find out more!**

25 Streaming Trends That Are Impacting Marketing Plans in 2025



Streaming Audience Behaviors & Attitudes

Devices, Platforms & Services, Oh My!

Ad-Supported Streaming in Focus

Quality Content Counts

1

Younger adults have a broader definition of what 'TV' means

2

Non-pay TV HHs are projected to overtake total pay-TV HHs (w/vMVPD)

3

Nearly six in 10 adults are now cordless

4

Based on age, streaming is either a replacement or complement to traditional TV

5

Multicultural adults make up 48% of the 18-34 streaming audience

6

Streaming now accounts for more than 40% of total time with TV

7

Convergent TV ad dollars are following the audiences to CTV

8

More consumers are streaming directly on smart TVs

9

Smart TV apps are viewers' go-to

10

Majority of smart TV households are 'streaming only'

11

The number of streaming apps used on smart TV has leveled off recently

12

Viewers are becoming more selective with using streaming services

13

Multiscreen TV streaming services, in all their forms, are ubiquitous

14

Ad-supported streaming now reaches nine out of 10 streaming adults

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Most streamers that watch ads use at least one multiscreen TV platform

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Two-thirds of streaming audiences prefer ad-supported services

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The gap between ad-free and ad-supported subscriptions is closing

18

Ad tiers are now driving new subscription sign-ups

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FAST has increased its scale as viewership becomes more habitual

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Commercial time on FAST has maintained a steady ad load

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Retail media spending on CTV platforms is expanding

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Audiences enjoy a mix of network-produced shows, movies & streaming originals

23

As share of time spent increases so does share of content spend

24

Live sports drive engagement on streaming platforms

25

Proliferation of services has driven viewers' interest in bundling

1

Streaming Audience Behaviors & Attitudes



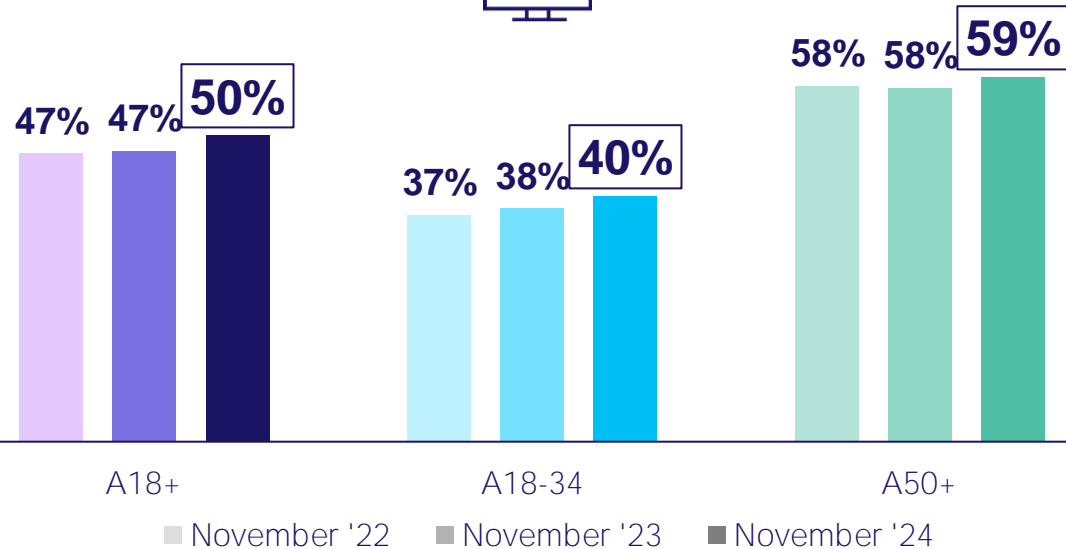
1

Younger adults have a broader definition of what 'TV' means to them even as the prominence of the TV set increases within their criteria

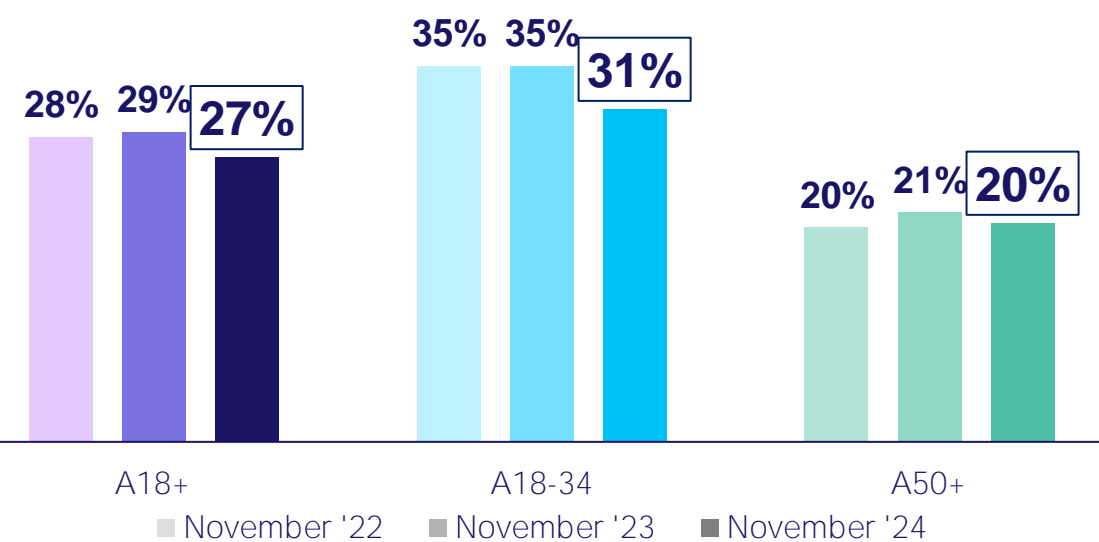
How do you personally define TV?

% of video streamers who agree

'Anything I can watch on my TV set whether it's via streaming or cable, satellite, fiber optic'



'Anything I can watch on any device'



Source: VAB analysis of MRI-Simmons November 2022, November 2023 & November 2024 Cord Evolution Study, A18+. Base = 'Streamed in the past 12 months.'

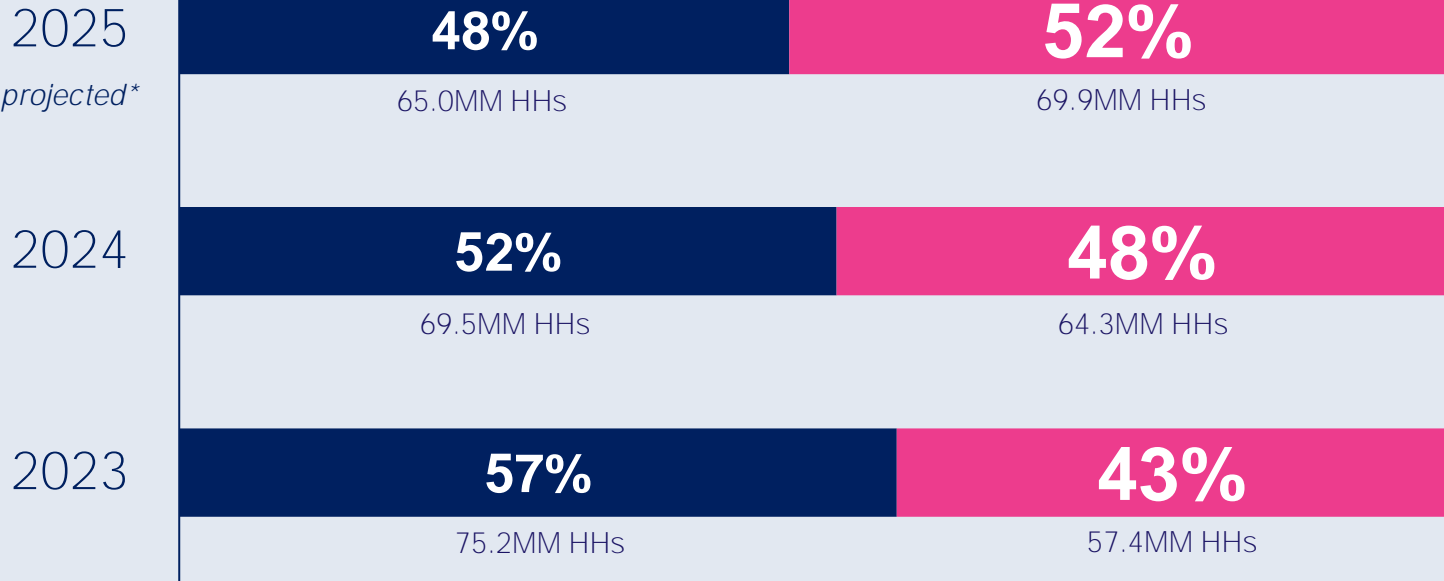
2

Non-pay TV HHs are projected to overtake total pay-TV HHs (including vMVPDs) during 2025 with nearly 70 million homes

Share of U.S. Pay TV vs. Non-Pay TV Households

Pay-TV HH universe include vMVPDs

■ Pay-TV HHs ■ Non-Pay TV HHs



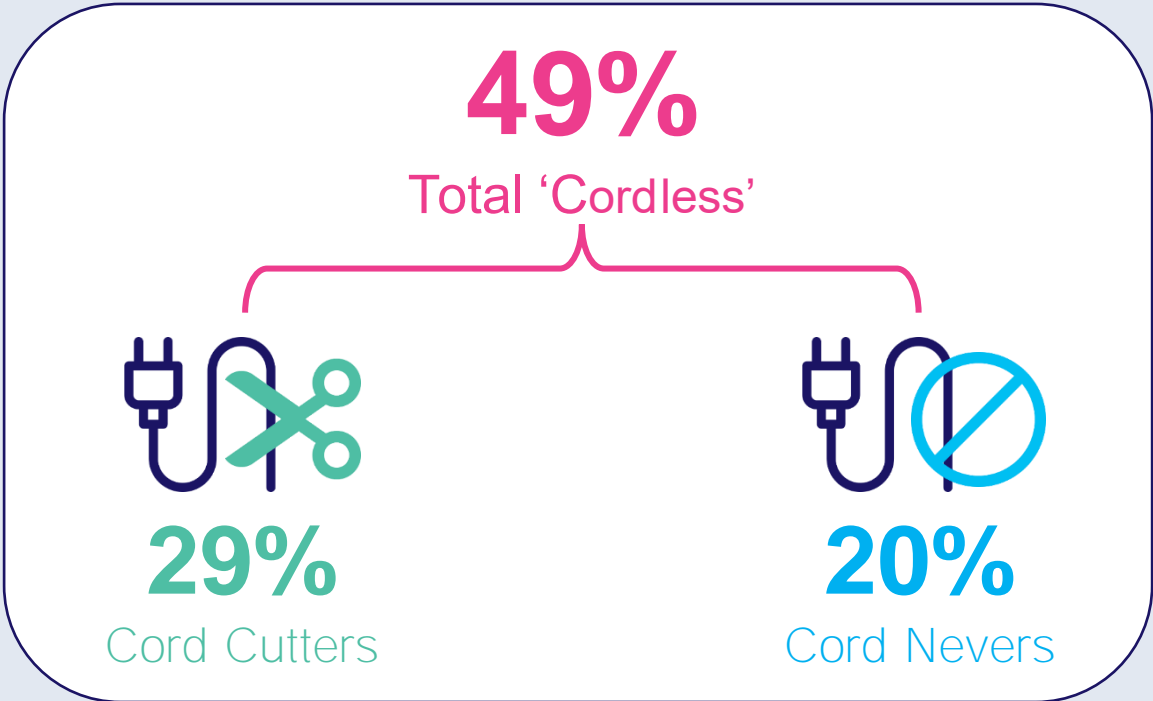
Source: EMARKETER, *Pay TV Households & Viewers, US*. Based on EMARKETER Forecast, October 2024. Note: Pay TV households are those with a subscription to a traditional or digital (vMVPD) pay TV service. Non-Pay-TV households are those without a subscription to a traditional or digital (vMVPD) pay TV service. Additional Note: Traditional pay TV services include cable, satellite, telecom and fiber operators, multiple system operators (MSOs), multichannel video programming distributors (MVPDs), and major TV broadcast and cable networks. Virtual multichannel video programming distributors (vMVPDs) are internet-delivered live TV services (e.g., Hulu + Live TV, Sling TV, YouTube TV). *2025 data based on EMARKETER Forecast projection.

3

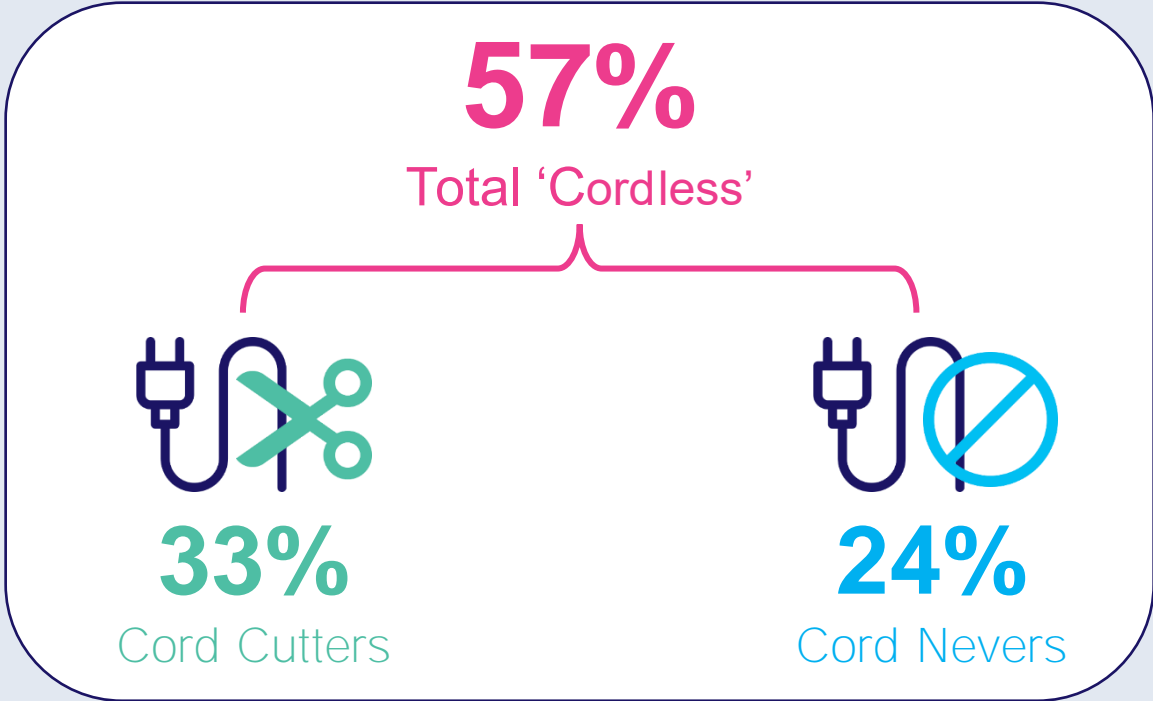
Nearly six in 10 adults are now cordless, making video streaming essential for optimizing reach in multiscreen TV campaigns

% of adults 18+ who are 'Cord Cutters' or 'Cord Nevers'

November 2022



November 2024



Source: VAB analysis of MRI-Simmons Cord Evolution Study, November 2022 & November 2024, A18+. 'Cord Cutters': no pay-TV; cancelled it, 'Cord Nevers': no pay-TV; never had it.

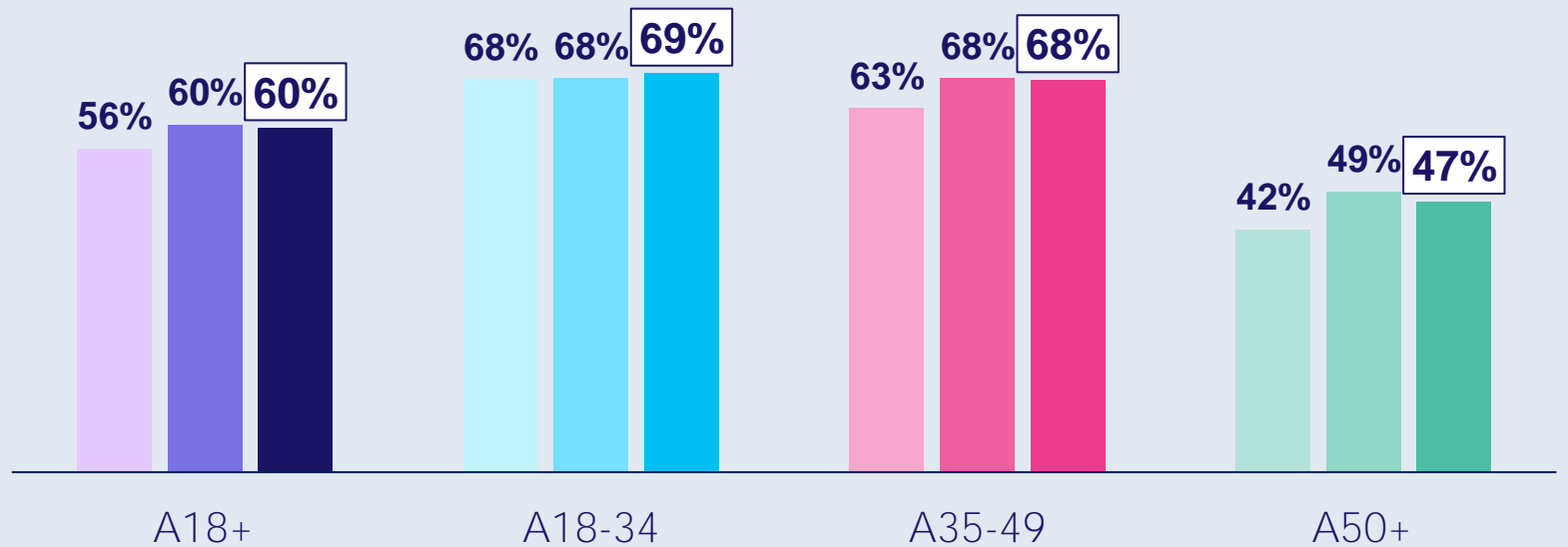
4 Most adults under 50 continue to see streaming as a replacement for traditional TV while older adults are more likely to see it as a complement



'Streaming has replaced traditional TV for me'

% of video streamers who agree

■ November '22 ■ November '23 ■ November '24



Source: VAB analysis of MRI-Simmons November 2022, November 2023 & November 2024 Cord Evolution Study, A18+. Base = 'Streamed in the past 12 months'.

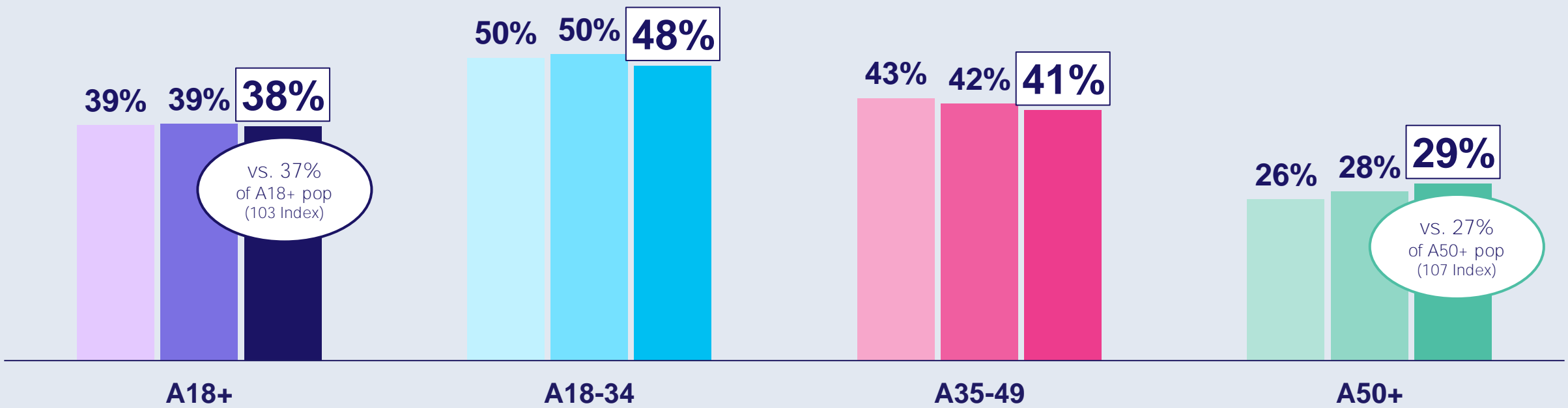
5

Multicultural adults make up a significant share of streaming audiences, underscoring their importance to multiscreen TV campaigns

Multicultural Audiences

% of U.S. A18+ Streaming Population by Age

■ Nov '22 ■ Nov '23 ■ Nov '24

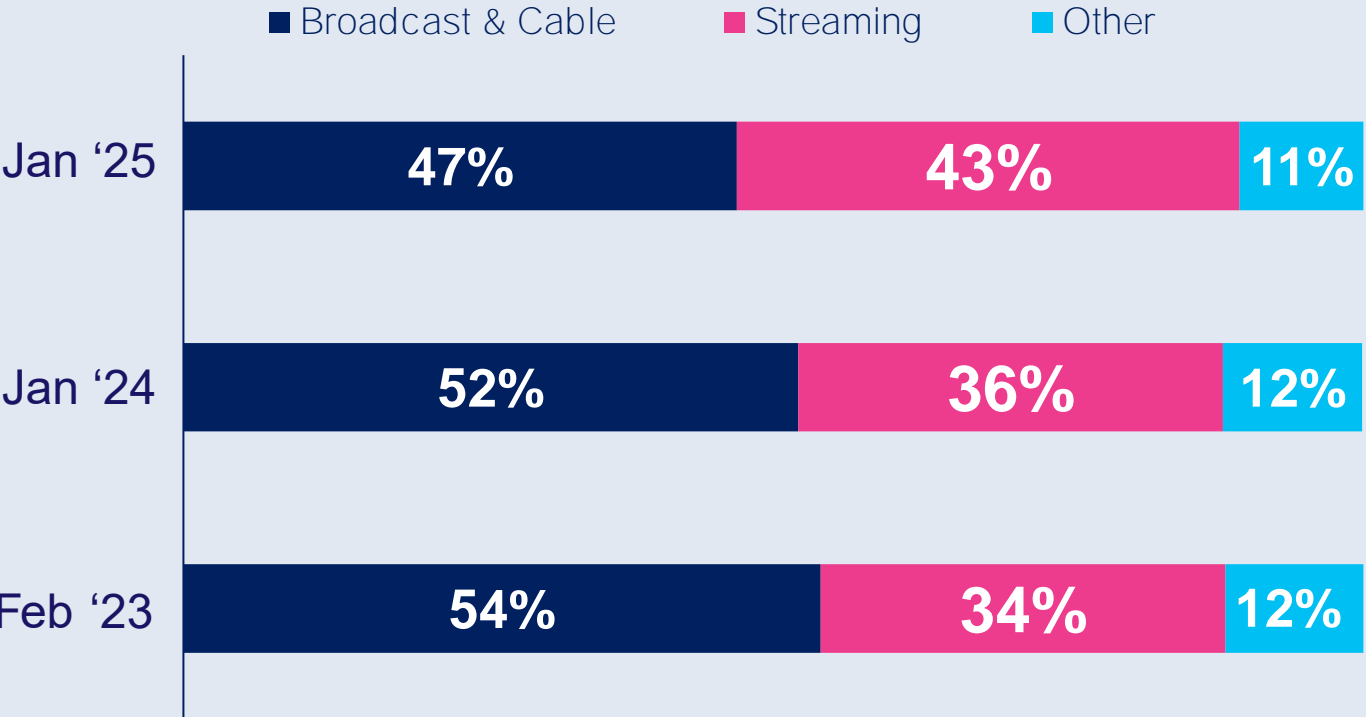


Source: VAB analysis of MRI-Simmons November 2022, November 2023 & November 2024 Cord Evolution Study, A18+. Base = 'Streamed in the past 12 months.' 'Multicultural Audiences' includes respondents who are of Spanish or Hispanic origin, non-Hispanic Black / African American, non-Hispanic Asian, non-Hispanic American Indian or Alaska Native and non-Hispanic other.

6

Streaming now accounts for more than 40% of total time with TV as the shift in viewership has increased over the last year

Share of Monthly Time Spent With TV

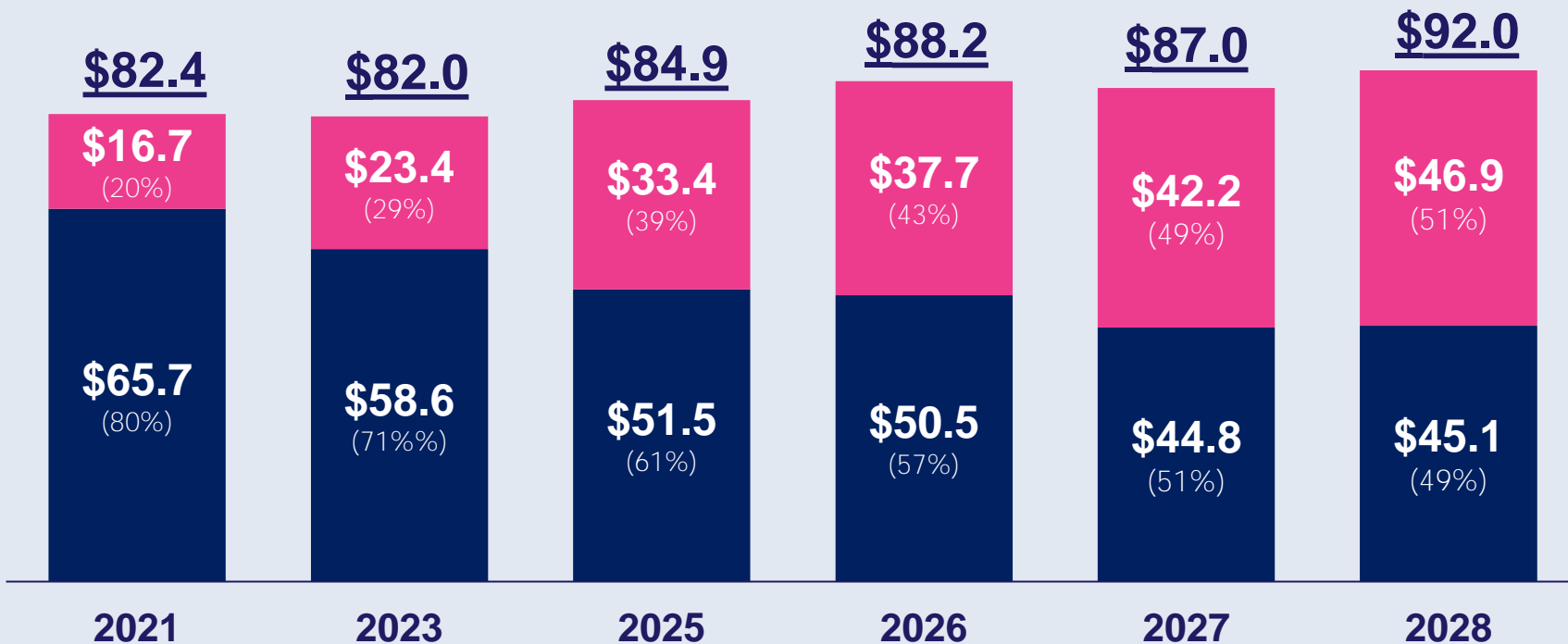


Source: VAB analysis of Nielsen, 'The Gauge', February 2023, January 2024 & January 2025, Total Day, P2+, 'Other' includes all other TV including all other tuning (unmeasured sources), unmeasured video on demand (VOD), audio streaming, gaming and other device (DVD playback) use. Nielsen implemented some methodological changes to The Gauge in February 2023 which is why we've included Feb '23 and not Jan '23.

7 Overall TV ad spend growth is being driven by CTV as marketers look to further engage with the platform's rapidly expanding audiences

U.S. TV and Connected TV (CTV) Ad Spend
in billions

■ Traditional TV ■ CTV



Source: EMARKETER Forecast, November 2024. Note: CTV includes digital advertising that appears on CTV devices, includes display ads that appear on home screens and in-stream video ads that appear on CTVs from platforms like Hulu, Roku and YouTube, and excludes network-sold inventory from traditional linear TV and addressable TV advertising; traditional TV includes broadcast TV (network, syndication and spot) and cable TV, and excludes digital.



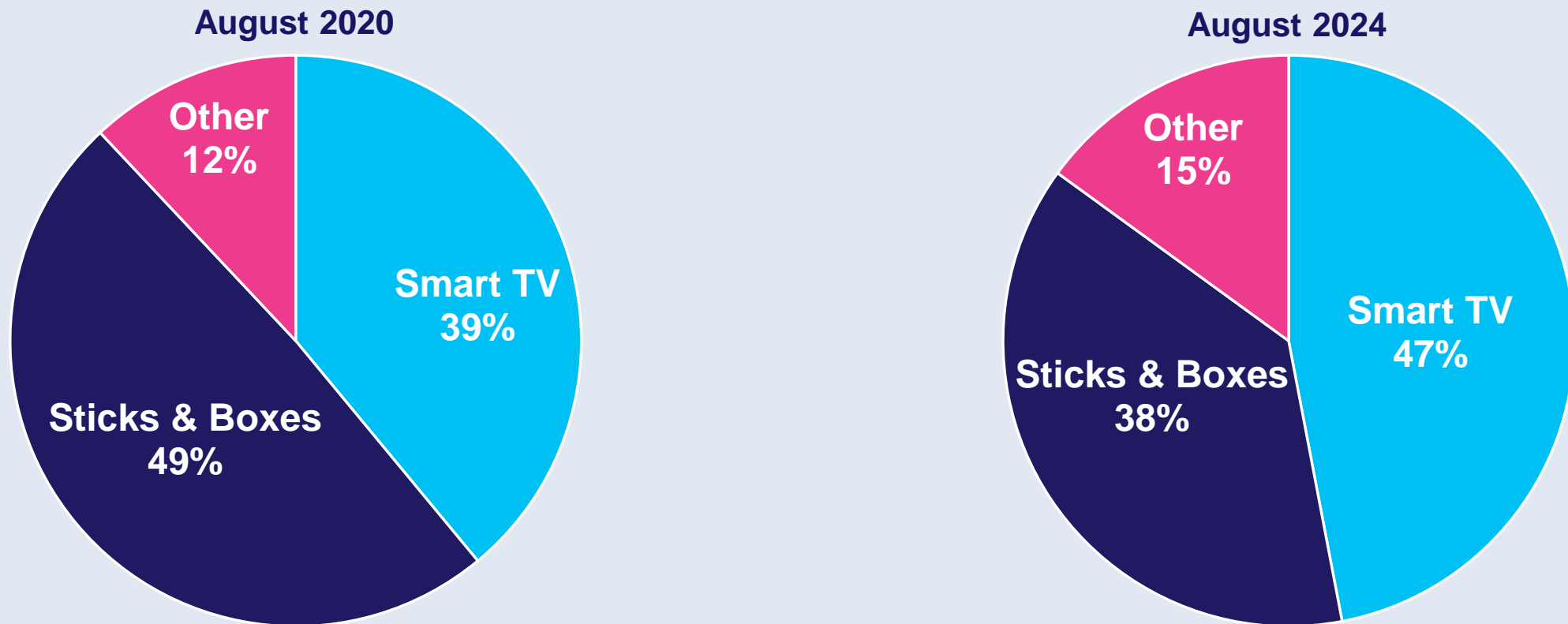
2

**Devices, Platforms & Services,
Oh My!**



Consumers are shifting more towards streaming directly through their smart TV, as they move away from sticks and boxes

Share of Total Hours by Device Type



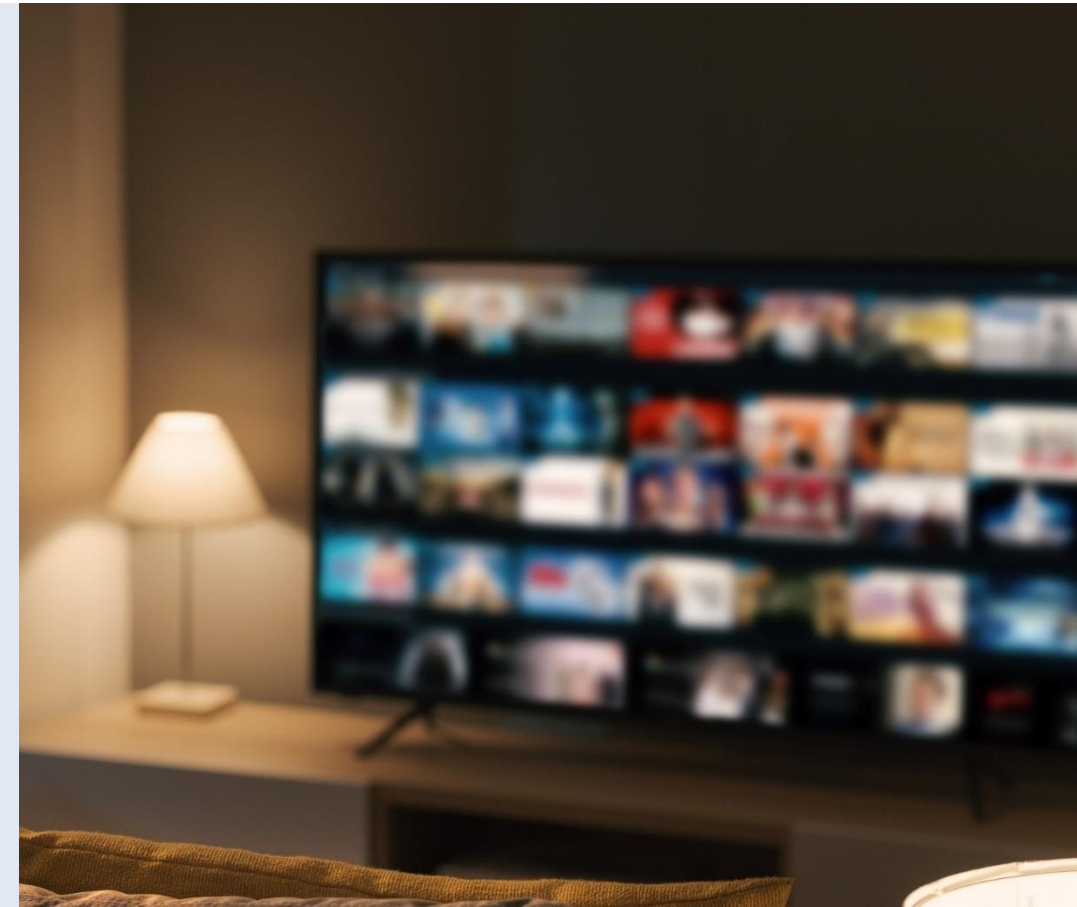
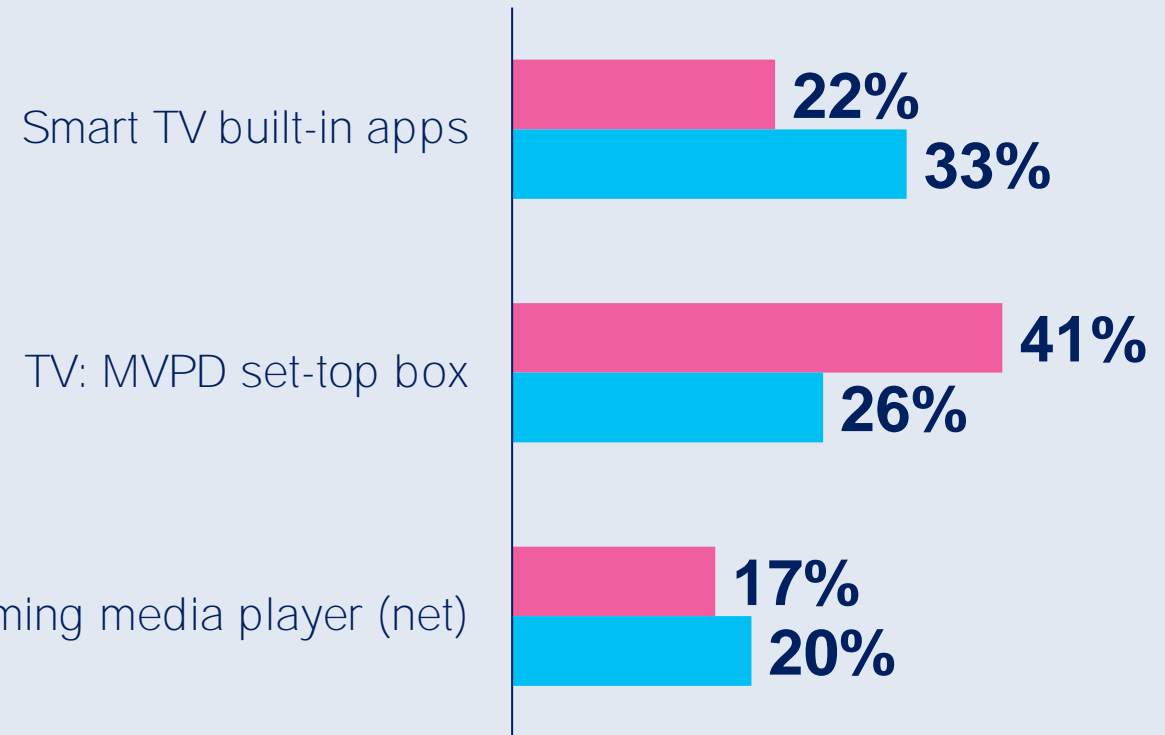
Source: Comscore at ARF OTT 2024, *Comscore Annual State of Streaming Report 2024*, 10/23/2024. Note: 'Other' consists primarily of video game consoles.

9

Among smart TV homes, built-in apps have become the default access point for TV viewing over any other device

Default Devices for Watching TV

■ 2021 ■ 2024

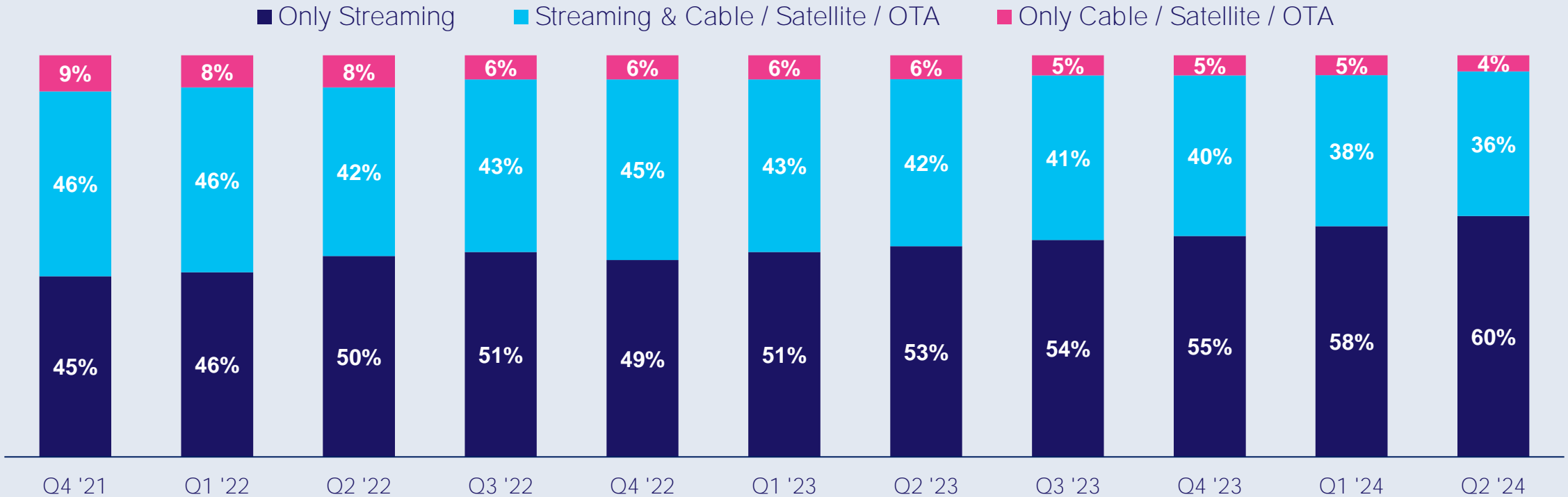


Source: Hub Entertainment, *Decoding The Default*, August 2024. Note: Smart TV built-in apps refer to both pre-installed apps and those that the owner installs. *TV: Streaming media player (net), e.g., Roku, Fire TV, Apple TV.

10

Smart TV HHs are now primarily accessing content through streaming, making it essential for marketers to prioritize CTV strategies

% of Smart TVs: Streaming vs. Cable / Satellite / OTA

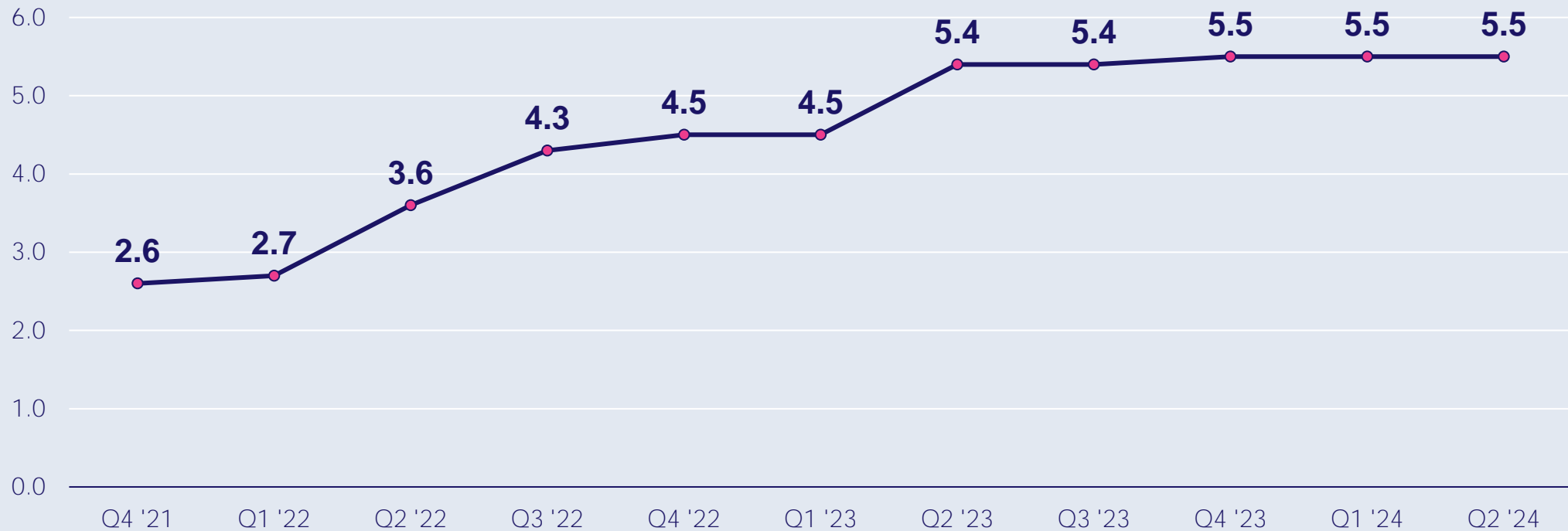


Source: Inscape, *TV Market Trends Report*, Q2 2024. Inscape TV Panel. Base: Opted-In Inscape TVs with at least one minute of app viewing. Streaming includes viewership on vMVPDs and 3P streaming devices. Gaming console viewing is not included in these calculations. Results do not add up to 100% due to rounding.

11

The number of native apps used quarterly on smart TVs has leveled off as consumers take an intentional approach with their consumption

Average Number of Native Apps Used by Smart TVs that Streamed



Source: Inscope, *TV Market Trends Report*, Q2 2024. Base: Opted-in Inscope TVs with at least one minute of app viewing. Streaming includes viewership on vMVPDs. Gaming console viewing is not included in these calculations.

12

Audiences are streamlining how they access content and being more selective with which streaming services they use



11

Average # of streaming services used in the past 12 months

(Down from 13 in 2023)



Source: MRI-Simmons, *From Cable to Clicks: The Evolution of American TV Habits*, 2025. Audience insights from MRI-Simmons' 2024 Cord Evolution Study. Streaming services includes a mix of ad-supported, ad-free, paid subscriptions, free services and TV network apps. Ad-supported includes YouTube, Prime Video, Tubi, Hulu, Roku, Netflix, Disney+, Pluto TV, Peacock, YouTube Music, ESPN+, Paramount+, ESPN, Fox Sports, Paramount, Max, YouTube Kids, Hallmark TV and Samsung TV Plus; non-ad supported includes Netflix, AppleTV+, Disney+, Prime Video, YouTube Premium, Max, Hulu, Starz, Paramount+, AMC+.

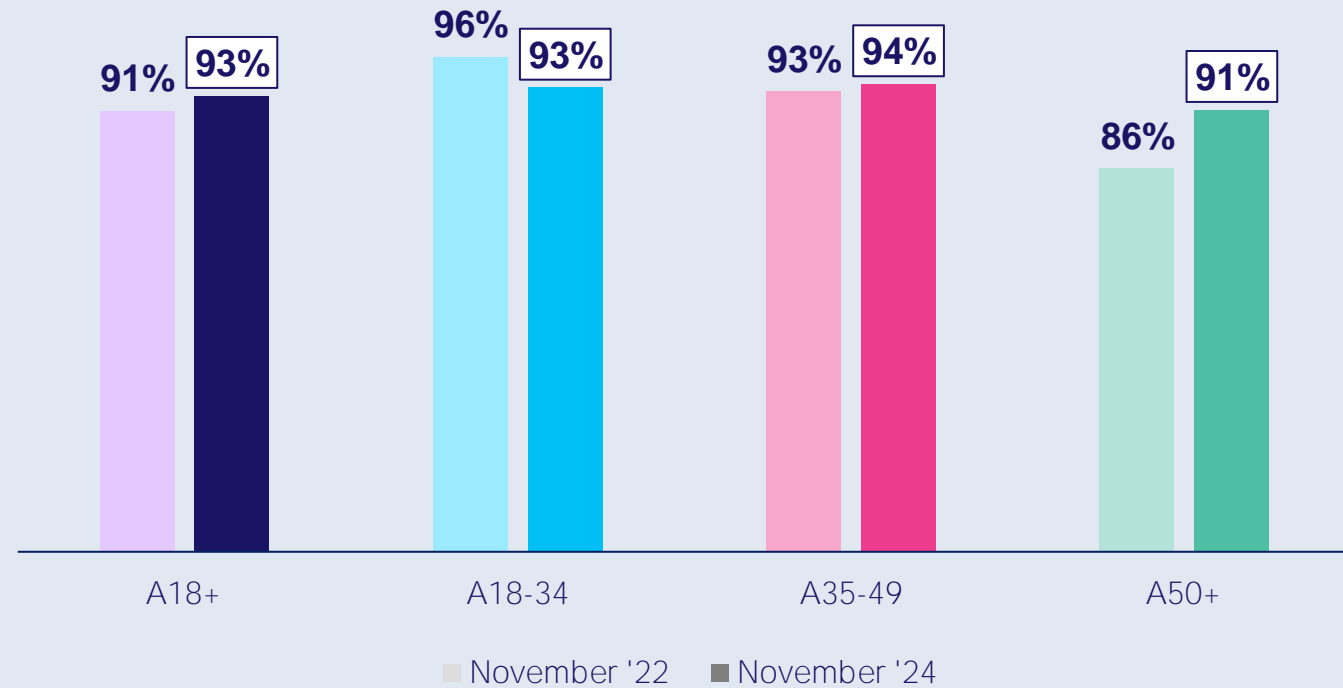
13

Multiscreen TV streaming platforms are ubiquitous and collectively now have over 90% penetration of streamers across all key age demos



% of streamers who have used a network TV app or streaming service owned by a multiscreen TV company

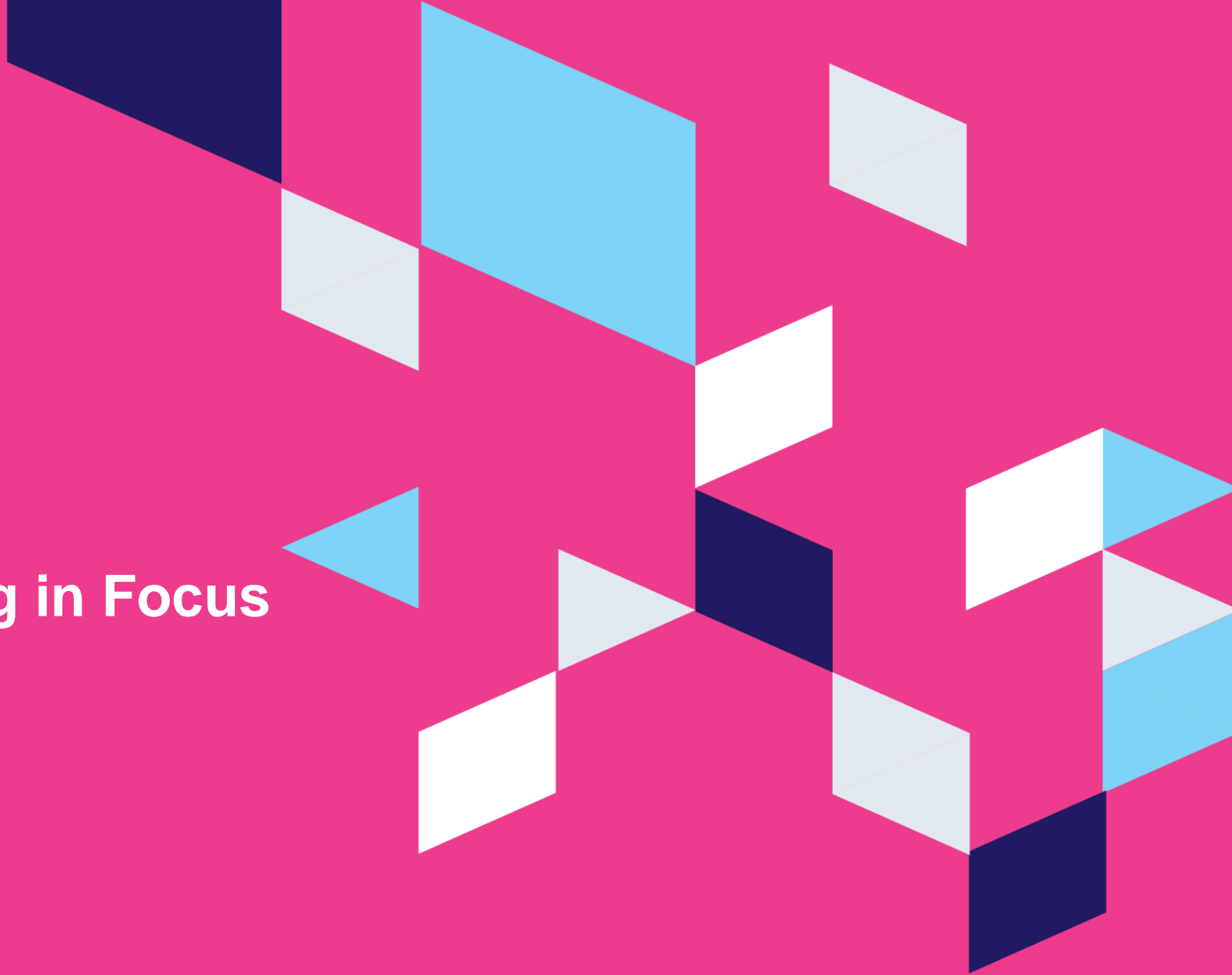
Last 30 days*



Source: VAB analysis of MRI-Simmons November 2022 & November 2024 Cord Evolution Study, A18+. *Q: Non ad-supported and ad-supported streaming services used in the past 30 days. Base = 'streamed in the past 12 months'. Note: To be considered a multiscreen TV app you must be a TV network, or an associated streaming app (e.g., Adult Swim, NBC) or an MVPD app (e.g., Spectrum, Xfinity) or a service owned by one of the major multiscreen TV companies (e.g., Disney+, Max, Paramount+).

3

Ad-Supported Streaming in Focus



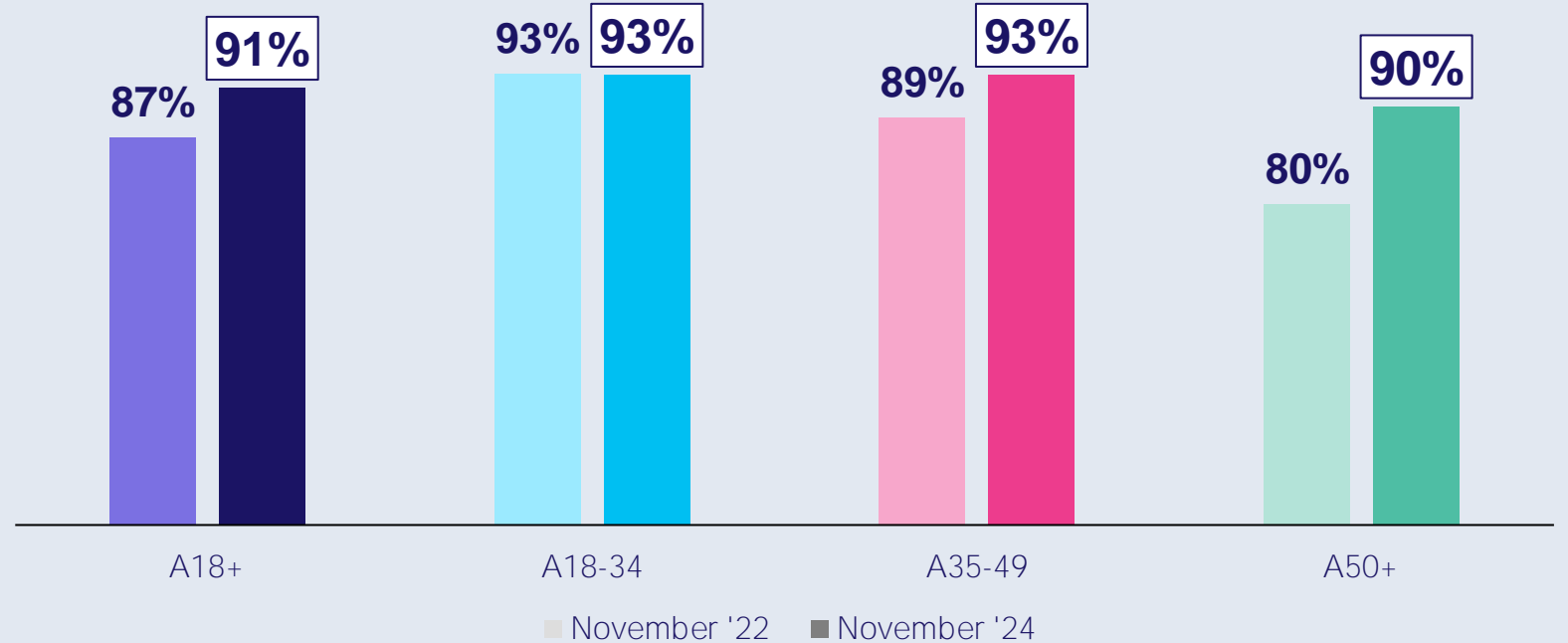
14

Through organic platform growth and the launch of new ad tiers, ad-supported streaming now reaches nine out of 10 streaming adults



% of streamers who used at least one ad-supported streaming service

Last 30 Days



Source: VAB analysis of MRI-Simmons November 2022 & November 2024 Cord Evolution Study, A18+. Base = 'streamed in the past 12 months'. November '22: reflects % of streamers who have used any ad-supported streaming service in the past 30 days. November '24: reflects % of streamers who have used any ad-supported streaming services in the past 30 days.

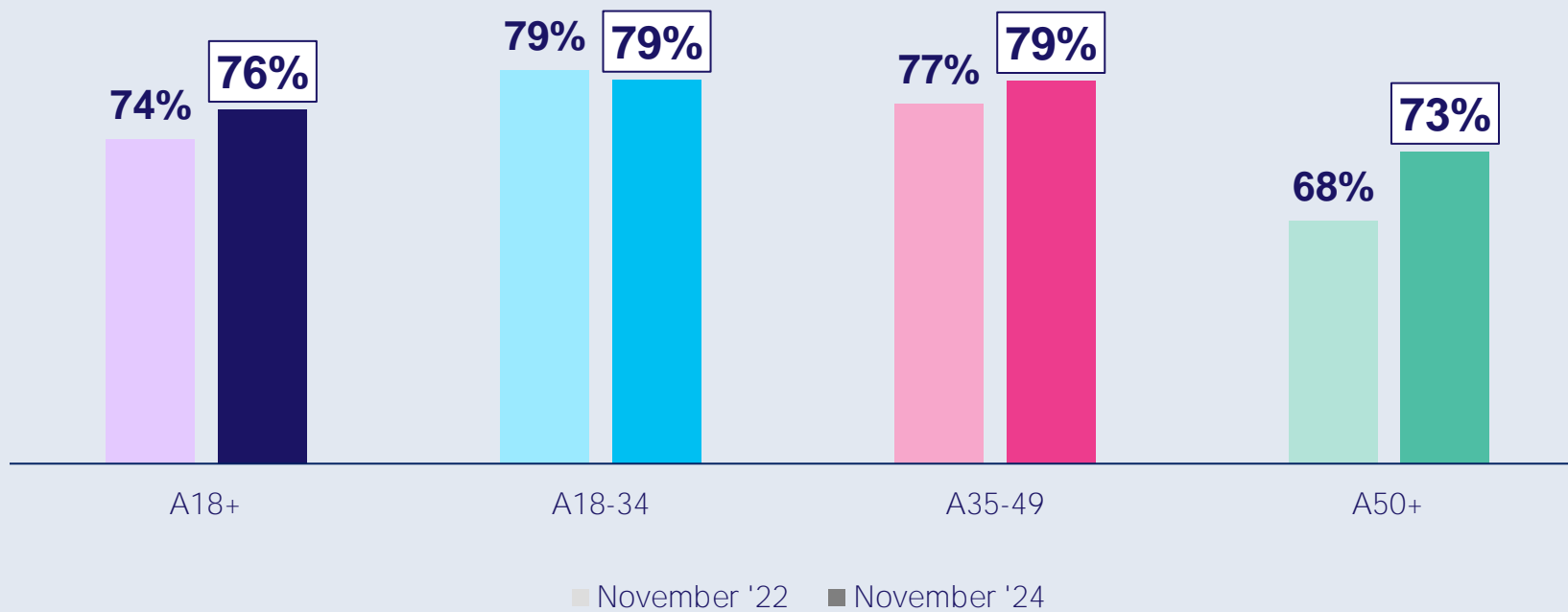
15

Most people that are watching ads on streaming services are specifically using at least one ad-supported multiscreen TV platform

▶ Within multiscreen TV platform streamers, % who use an ad-supported service or tier: A18+ : 83%; A18-34: 85%; A35-49: 84%; A50+ : 81%

% of streamers who have used a network TV app or ad-supported streaming service owned by a multiscreen TV company*

Last 30 Days



Source: VAB analysis of MRI-Simmons November 2022 & November 2024 Cord Evolution Study, A18+. Q: Ad-supported streaming services used in the past 30 days. Base = 'streamed in the past 12 months'. Note: To be considered a multiscreen TV app you must be a TV network, or an associated streaming app (e.g., Adult Swim, NBC) or an MVPD app (e.g., Spectrum, Xfinity) or a service owned by one of the major multiscreen TV companies (e.g., Disney+, Max, Paramount+)

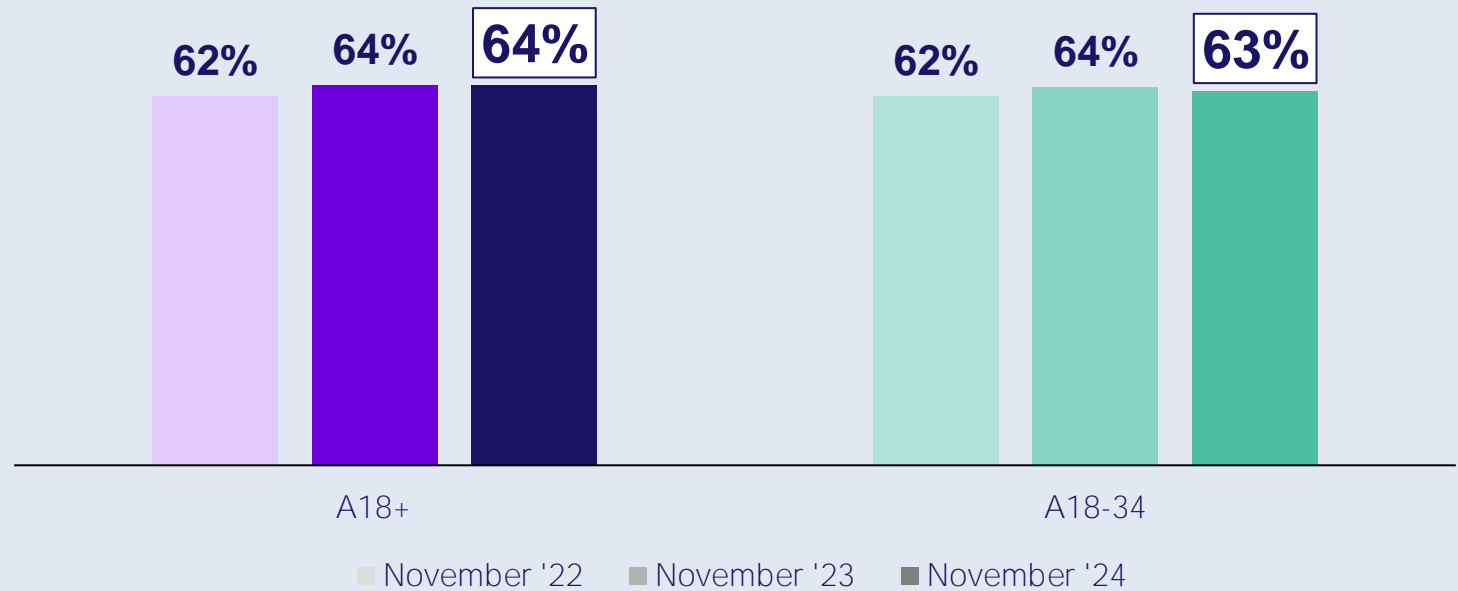
16

Two-thirds of streaming audiences have consistently preferred ad-supported services and tiers for the cost benefit and value exchange



'I prefer streaming free video content with ads / commercials instead of paying for a subscription without ads / commercials'

% of video streamers that agree



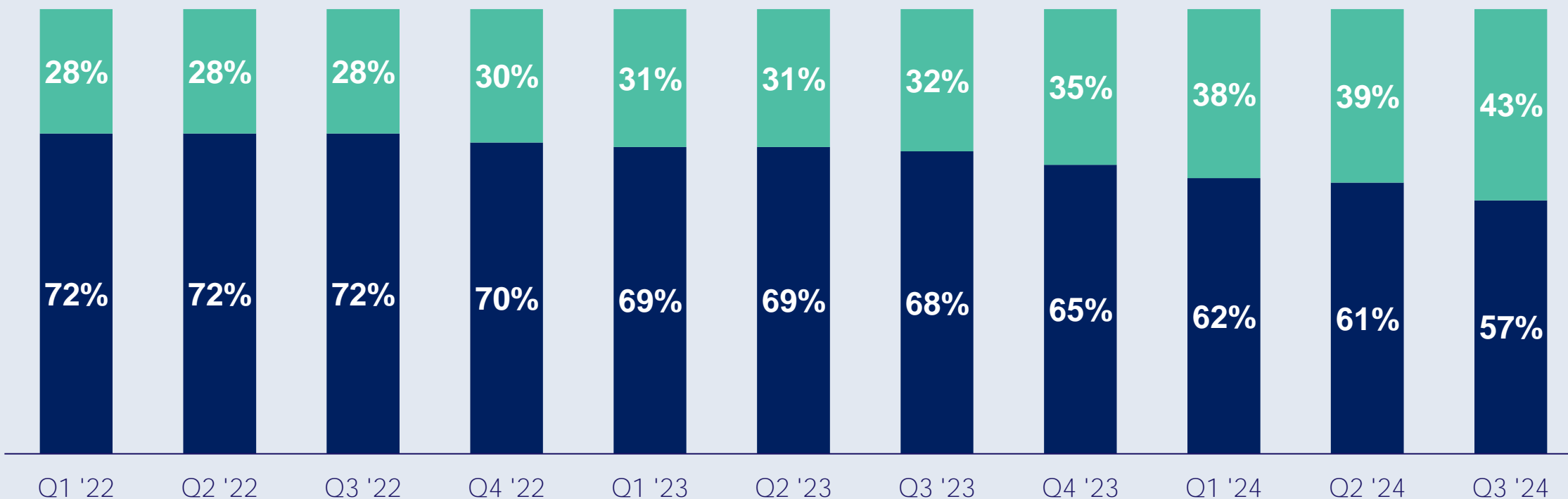
Source: VAB analysis of MRI-Simmons November 2022, November 2023 & November 2024 Cord Evolution Study, A18+. 'I prefer streaming free video content with ads/commercials instead of paying for a subscription without ads/commercials' (strongly / somewhat agree). Base = 'Streamed in the past 12 months'.

17

While total streaming subscriptions still skew towards ad-free, the gap with ad-supported subscriptions is steadily closing

Share of Total Quarterly Subscriptions

■ Ad-free ■ Ad-supported



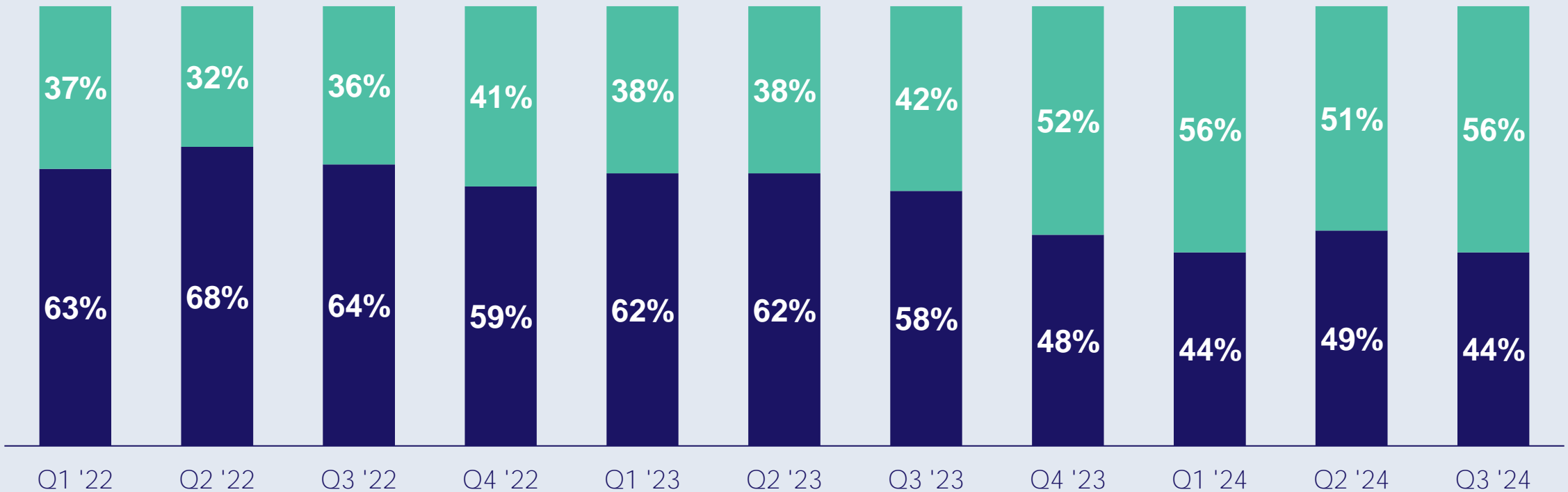
Source: Antenna, A Closer Look at the Growth in Ad-Supported Streaming, 2024. Note: US only. Services measured are AMC+, BET+, Discovery+, Disney+, Hulu, Max, Netflix, Paramount+ and Peacock.

18

Ad tiers are now driving new streaming subscription sign-ups, which signals a shift in preference toward lower-cost, ad-supported options

Share of Quarterly Gross Subscriptions

■ Ad-free ■ Ad-supported



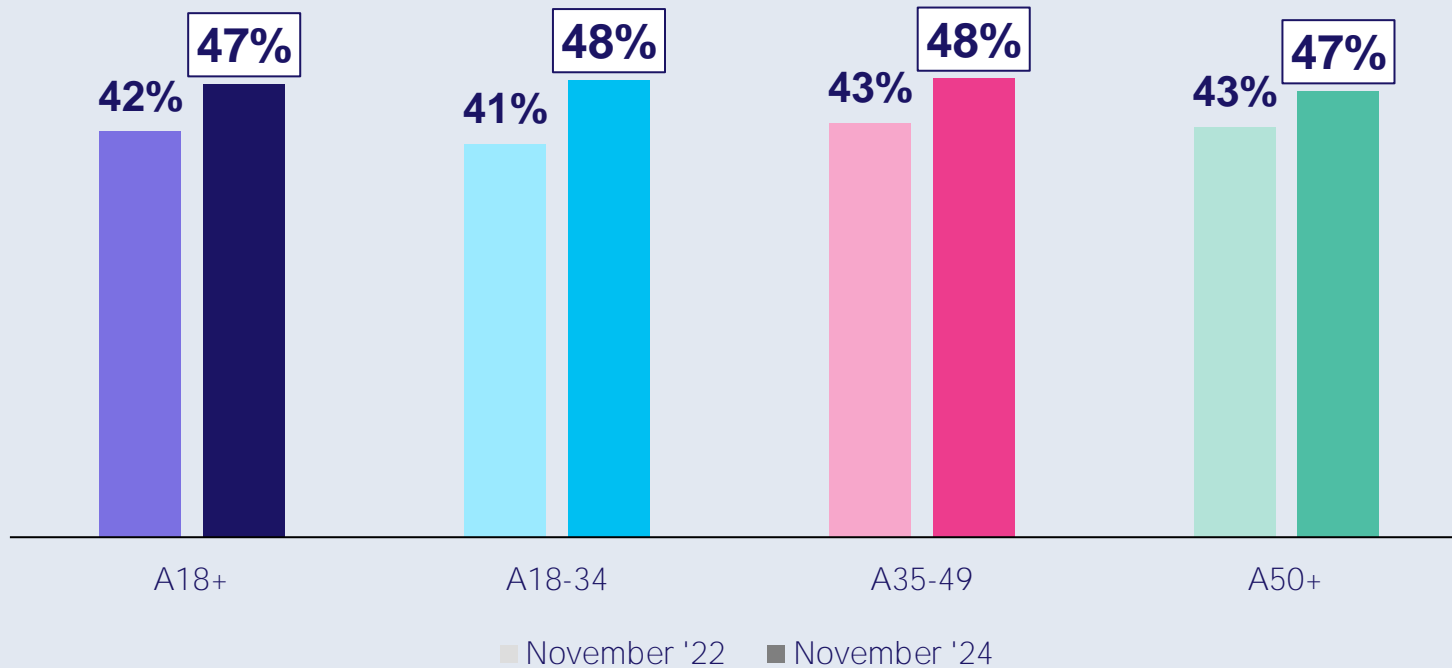
Source: Antenna, A Closer Look at the Growth in Ad-Supported Streaming, 2024. Note: US only. Services measured are AMC+, BET+, Discovery+, Disney+, Hulu, Max, Netflix, Paramount+ and Peacock.

19

FAST services are achieving meaningful scale as viewership becomes more habitual and advertising opportunities increase

% of U.S. adult 18+ streamers that watch FAST (Free Ad-supported Streaming TV) services

Last 30 Days



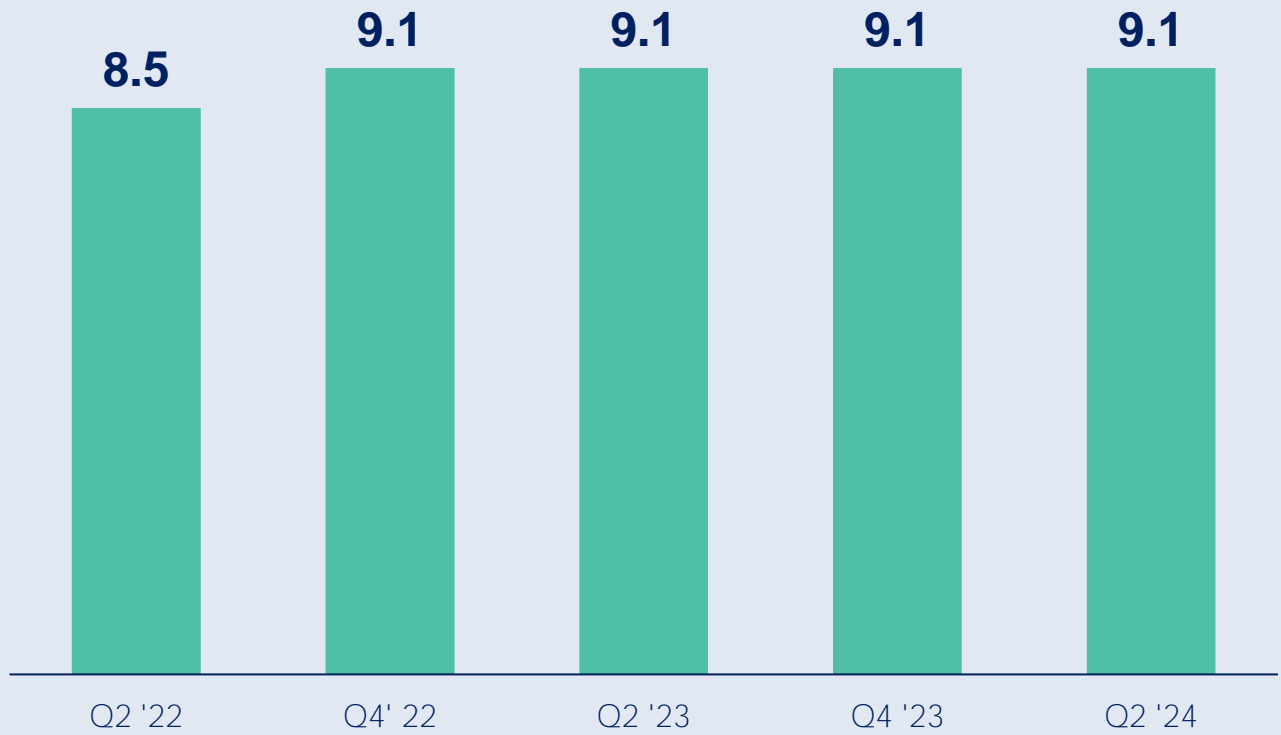
Source: VAB analysis of MRI-Simmons November 2022 & November 2024 Cord Evolution Study, A18+. Base = 'streamed in the past 12 months'. November '24: Used any of these FAST services in the past 30 days: (includes Freevee, Local Now App, Plex, Pluto TV, Roku Channel, Samsung TV Plus, Tubi, Xumo Play). November '22: Used any of these FAST services in the past 30 days: (includes Freevee, Local Now, Roku Channel, Peacock Free, Pluto TV, Samsung TV Plus, Xumo, Bloomberg, Plex).

20

Commercial time on FAST has maintained a stable nine-minute ad load, striking a balance between monetization and viewer experience



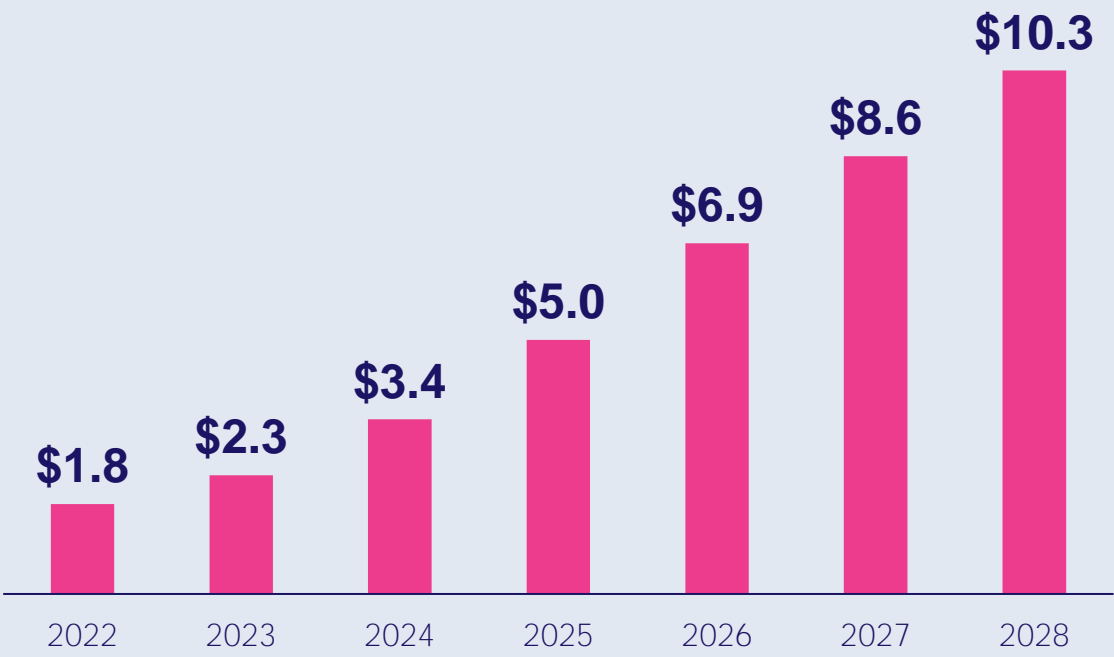
Average Commercial Minutes Per Hour on FAST



Source: Wurl Analytics, *The CTV Trends Report 2024*. Note: Based on data across Wurl's partnerships with more than 4,000 FAST channels and streaming services.

Retail media through connected TV is expanding data partnerships and shoppable advertising opportunities on streaming platforms

U.S. Retail Media Connected TV Ad Spending
In billions



Sampling of Recent News about Retail Media

adexchanger 1/30/25
NBCUniversal And Instacart Team Up To Give Brands More Retail Data

AdAge 11/26/24
WALMART AND NBCU BRING SHOPPABLE ADS, OUTCOMES MEASUREMENT TO LIVE SPORTS

THE RETAIL TOUCHPOINTS NETWORK 5/9/24
Disney and Walmart Unveil Retail Media-CTV Advertising Integration

EMARKETER 9/12/24
Paramount makes the VMAs shoppable amid broader live commerce push

ADWEEK 5/8/24
Disney, Walmart Team Up for Enhanced Targeting, Measurement Across Streaming

Source: EMARKETER Forecast, November 2024. Note: Digital advertising that appears on websites or apps that are primarily engaged in retail ecommerce or is bought through a retailer's media network or demand-side platform (DSP); examples of websites or apps primarily engaged in retail ecommerce include Amazon, Walmart, and eBay; examples of retail media networks include Amazon's DSP and Etsy's Offsite Ads; includes ads purchased through retail media networks that may not appear on ecommerce sites or apps. Additional Note: Includes advertising that appears on desktop and laptop computers as well as mobile phones, tablets, and other internet-connected devices, and includes all the various formats of advertising on those platforms.

4

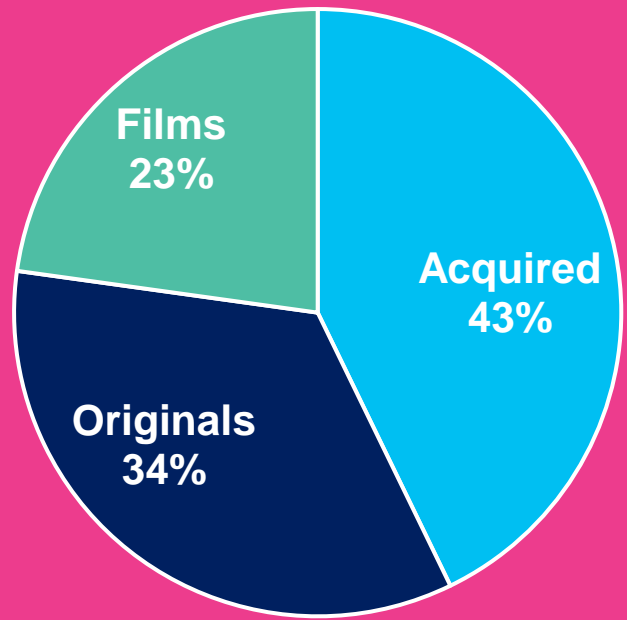
Quality Content Counts



Audiences enjoy a mix of network-produced shows, blockbuster movies and streaming originals, appreciating familiarity and variety

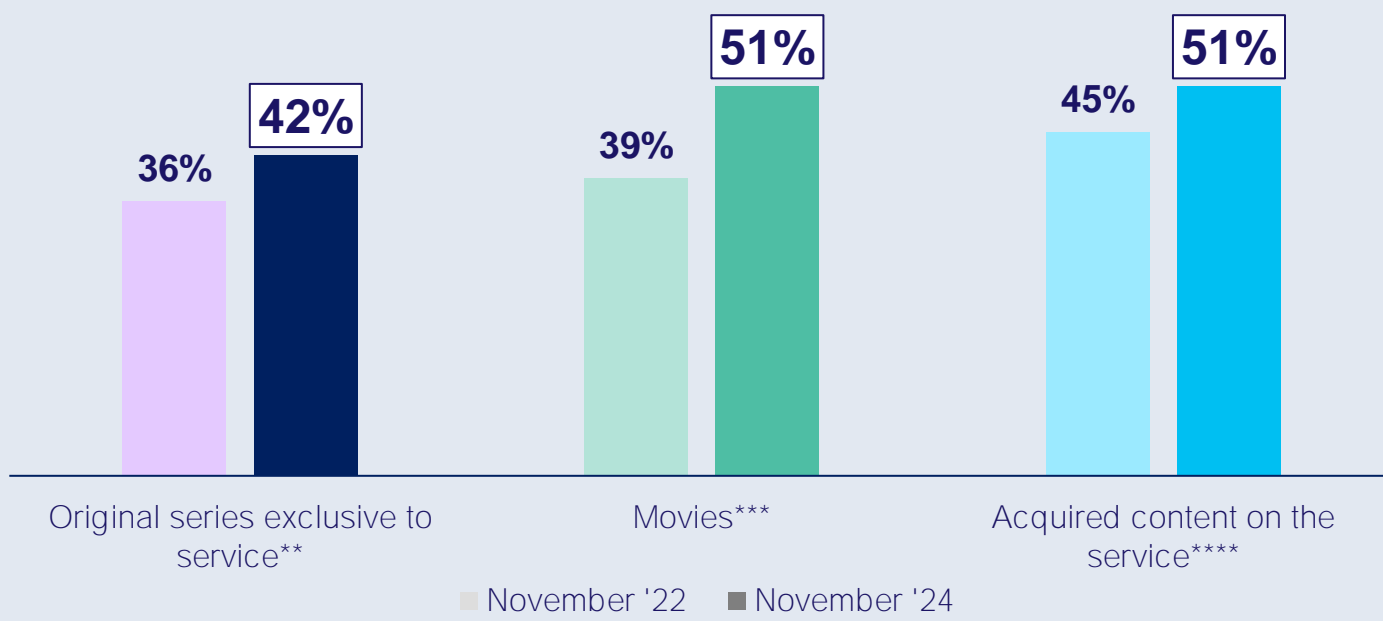
Share of Total Hours Viewed

2024



Top Drivers to Use / Subscribe to a Streaming Service*

% of streamers



Source: The Ankler, *Streaming Libraries: Next War in the Retention Economy*, 1/23/25. *VAB analysis of MRI-Simmons November 2022 & November 2024 Cord Evolution Study, A18+. Base = 'streamed in the past 12 months'. **e.g., *Stranger Things*, *Handmaids Tale*, *The Crown*, etc. ***Old and new releases. ****Reflects respondents who selected 'Series that no longer air on traditional TV networks (e.g., *Friends*, *How I Met Your Mother*, *Friday Night Lights*, etc.) OR 'Series that are currently airing on traditional TV networks (e.g., *The Walking Dead*, *The Good Place*, *This Is Us*, etc.)'

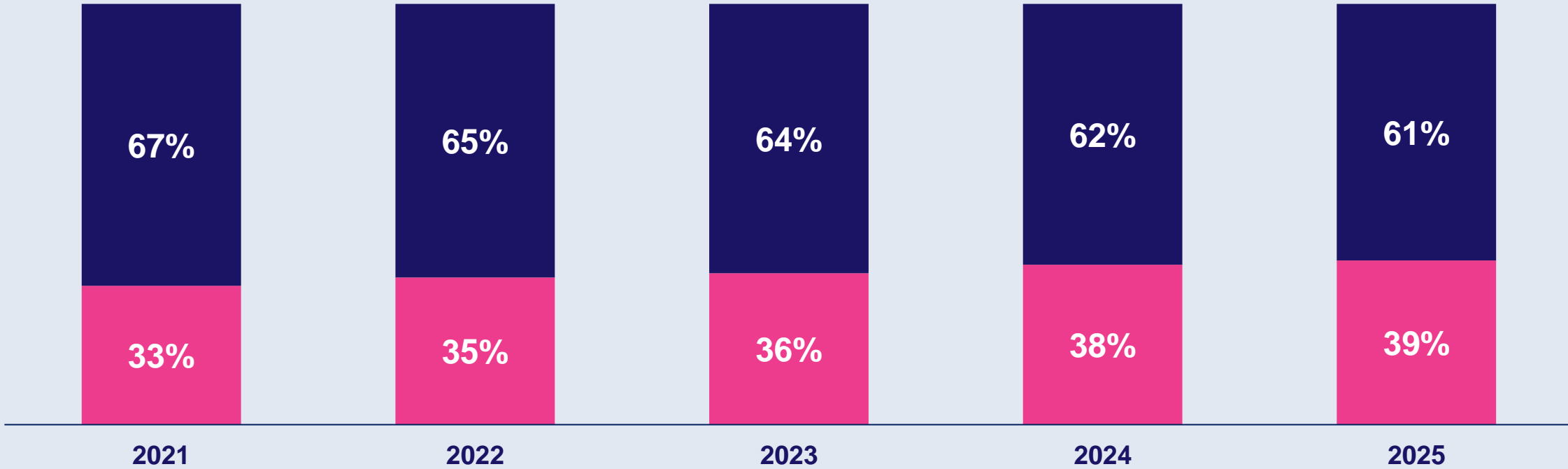
23

As share of time spent increases, so does share of content spend as streaming platforms look to increase engagement across more viewers

Global Content Spend by Company Type

% Share

■ Streaming Services ■ All Others




Source: Ampere Analysis, February 2025. 'All Others' include commercial broadcasters, public broadcasters, theatrical studios and Pay-TV networks.

24

Live sports streaming has seen significant viewership growth as leagues, such as the NFL, expand their digital presence

P2+ Average Audience (Weekly Average, Per Min) 2024 Exclusive Streaming Games vs. 2023 Comparable Games



Peacock Exclusive
9/6 Packers @Eagles

14.0 MM


+91%
vs. 2023
12/23 Bills @Chargers (Peacock)



Black Friday
11/29 Raiders @Chiefs

13.5 MM

+41%
vs. 2023
11/24 Dolphins @Jets (Amazon Prime)



Christmas
Chiefs @Steelers
Ravens @Texans

24.3 MM

-16%
vs. 2023
Raiders @Chiefs (CBS)
Giants @Eagles (Fox)

Click here to download VAB's full report to learn more, ['Huddle Up! A Look Inside the NFL's 2024 Season Viewership Evolution'](#)

Source: VAB analysis of Nielsen Ratings Analysis Program Report, Peacock Exclusive (Peacock Streaming Data), Black Friday (Amazon Prime (incl local broadcast for in-game markets only)), Christmas (Exclusive game on Netflix). Live+SD_P2+_Panel data. **CBS and Fox reflects linear TV audience only and does not include audiences gained from their digital / app streaming.** The comparable games reflect the same event or streaming service that aired NFL primetime games in 2023. The Christmas two games on Netflix is compared to the Christmas games that aired on linear TV in 2023 at the same daypart (afternoon games).

25

As services have proliferated, viewers are increasingly drawn to bundling to get access to more content with streamlined payment



67%

of U.S. adults 18+ are interested in a service that **bundles multiple streaming platforms** with a **single payment**

+5% vs. August 2023

Sampling of Recent News about Streaming Bundles

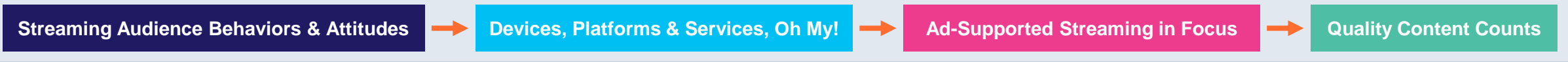
MediaPost 1/23/25
Comcast Launches 'Skinny' Bundle: Focuses On Sports, News

CNET 1/22/25
Starz and Max Roll Out an Exclusive New Streaming Bundle

DEADLINE 12/4/24
Disney Brings Last Piece Of Its Streaming Bundle To Disney+, With ESPN+ Joining Hulu Under The Main Tent

Source: Ipsos as cited in company blog, October 18, 2024. Note: ages 18+. Based on August 2023 vs. August 2024. Reflects respondents who answered 'somewhat interested' or 'very interested'.

25 Streaming Trends That Are Impacting Marketing Plans in 2025



<p>1</p> <p>Younger adults have a broader definition of what 'TV' means</p>	<p>2</p> <p>Non-pay TV HHs are projected to overtake total pay-TV HHs (w/vMVPD)</p>	<p>3</p> <p>Nearly six in 10 adults are now cordless</p>	<p>4</p> <p>Based on age, streaming is either a replacement or complement to traditional TV</p>	<p>5</p> <p>Multicultural adults make up 48% of the 18-34 streaming audience</p>
<p>6</p> <p>Streaming now accounts for more than 40% of total time with TV</p>	<p>7</p> <p>Convergent TV ad dollars are following the audiences to CTV</p>	<p>8</p> <p>More consumers are streaming directly on smart TVs</p>	<p>9</p> <p>Smart TV apps are viewers' go-to</p>	<p>10</p> <p>Majority of smart TV households are 'streaming only'</p>
<p>11</p> <p>The number of streaming apps used on smart TV has leveled off recently</p>	<p>12</p> <p>Viewers are becoming more selective with using streaming services</p>	<p>13</p> <p>Multiscreen TV streaming services, in all their forms, are ubiquitous</p>	<p>14</p> <p>Ad-supported streaming now reaches nine out of 10 streaming adults</p>	<p>15</p> <p>Most streamers that watch ads use at least one multiscreen TV platform</p>
<p>16</p> <p>Two-thirds of streaming audiences prefer ad-supported services</p>	<p>17</p> <p>The gap between ad-free and ad-supported subscriptions is closing</p>	<p>18</p> <p>Ad tiers are now driving new subscription sign-ups</p>	<p>19</p> <p>FAST has increased its scale as viewership becomes more habitual</p>	<p>20</p> <p>Commercial time on FAST has maintained a steady ad load</p>
<p>21</p> <p>Retail media spending on CTV platforms is expanding</p>	<p>22</p> <p>Audiences enjoy a mix of network-produced shows, movies & streaming originals</p>	<p>23</p> <p>As share of time spent increases so does share of content spend</p>	<p>24</p> <p>Live sports drive engagement on streaming platforms</p>	<p>25</p> <p>Proliferation of services has driven viewers' interest in bundling</p>

Key Marketer Takeaways

The 'mainstreaming' of streaming is creating more opportunities for investment in premium video

- ▶ As streaming reshapes consumer perceptions of TV, more marketers are shifting ad spend across premium video platforms to follow evolving viewer behaviors
- ▶ While audiences are streamlining their streaming services and becoming more intentional with how they consume content, multiscreen TV platforms have collectively reached near-ubiquity across key demos which creates many cross-platform opportunities for brands
- ▶ The pendulum for new streaming subscriptions has swung towards ad-supported tiers which creates greater scale for brands to reach highly engaged audiences, especially through innovative ad executions
- ▶ Viewers gravitate towards services that provide, and invest in, high quality content - such as acquired libraries, originals and live sports – which highlights the need for marketers to partner with premium video platforms to ensure this pipeline continues

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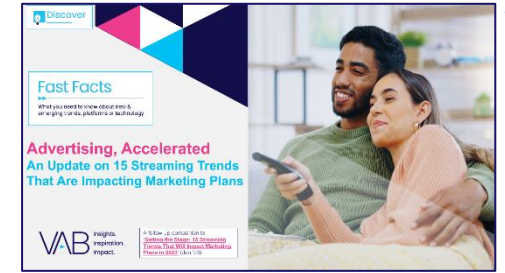
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What it Means for Multiscreen TV and
Why it Matters to Marketers

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