



**Q2 2025** TiVo Video Trends Report: **North America**

# THE GREAT REBUNDLING

Continues as viewers spring thru 2025





# INTRODUCTION

This spring, North American video entertainment consumption continued to notably change. According to TiVo's Q2-2025 Video Trends Report, viewers are now using close to 11 different video sources, including cable and satellite TV, premium streaming services, social platforms, and free ad-supported options. This unprecedented variety has given rise to a fragmented but vibrant entertainment landscape, where consumers have more options than ever before.

With these choices, spending on video entertainment also saw a seasonal increase. On average, consumers are paying \$20-30 more per month than they did the previous year, driven largely by seasonal price increases, as well as the popularity of bundled service offerings for exclusive content available only on select platforms. This willingness to spend highlights a strong desire for personalized and high-quality viewing experiences as well as the resiliency of video in these trying economic times.

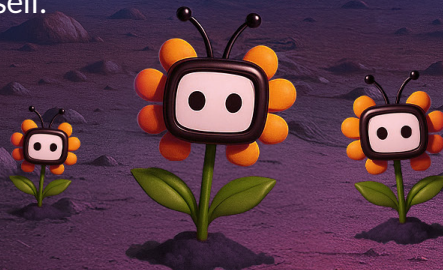
Despite this abundance, content discovery remains a challenge. Fewer viewers are turning to traditional advertising—such as commercials—to find new shows or movies. The number relying on commercials for discovery has dropped by 5% since last year, and by over 14% since mid-2022. Instead, audiences are seeking recommendations from friends, social media buzz, online reviews, and algorithm-driven suggestions.

As the world of video entertainment continues to diversify, consumers and providers alike must navigate an ever-evolving landscape—where innovation in content delivery and discovery is as important as the content itself.



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# AVERAGE NUMBER OF SERVICES REVERTING TO 2023 LEVELS; 44% REPORTED THE USE OF AT LEAST ONE BUNDLE

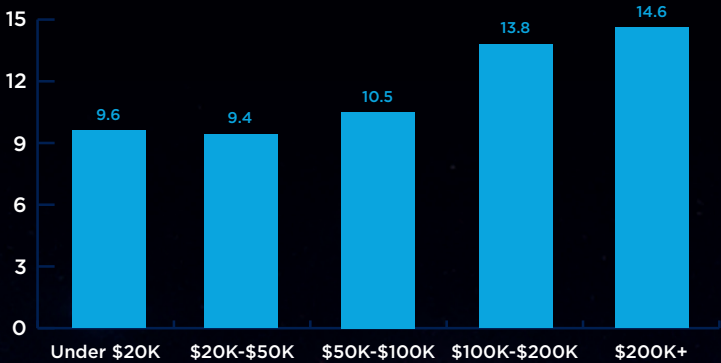
Respondents use an average of **10.87** sources, compared to **9.10** in Q2 2024.

Average number of video services: Paid vs Non-Paid  
(% of total respondents)



Higher household incomes are generally associated with a higher number of sources, particularly for those earning **\$100k+**

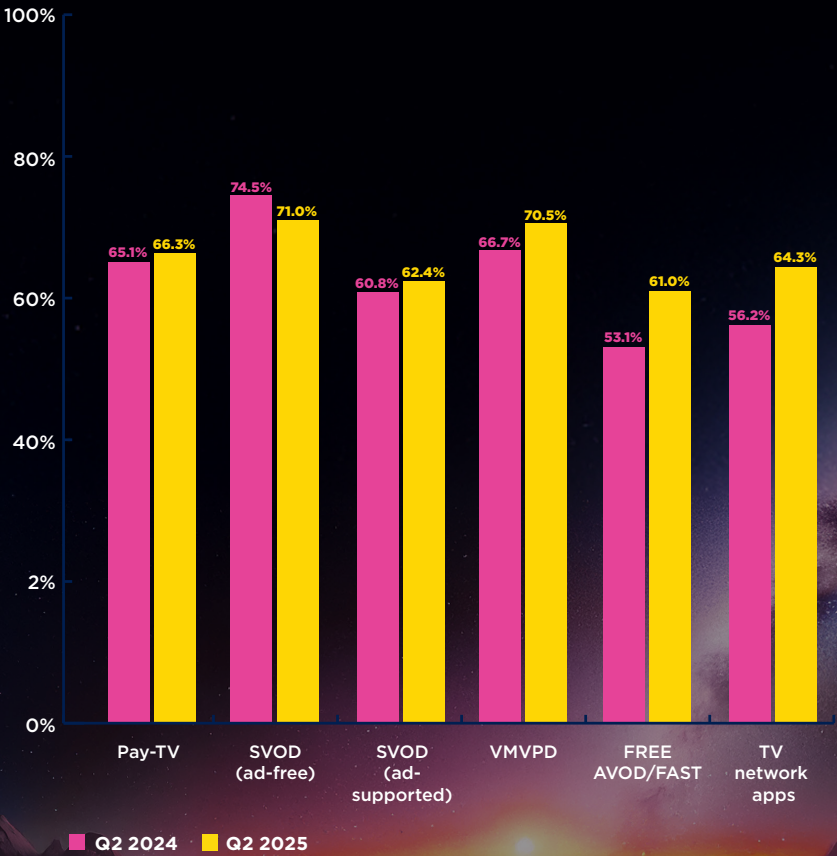
Average number of video services  
(% of total respondents by income level)



Perceptions of the quality of programming across free services increased in Q2 2025, with AVOD services seeing an **8%** jump in quality from Q2 2024.

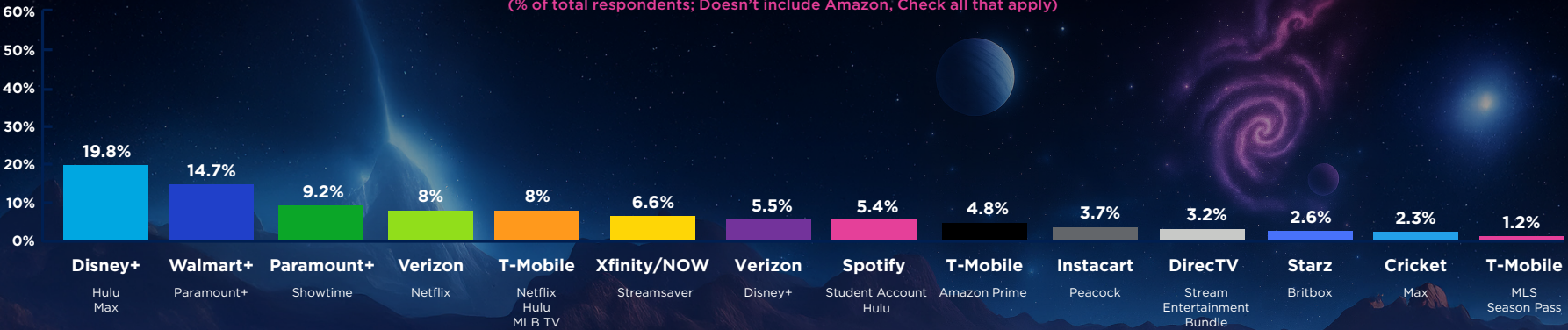
Quality Perception By Screen

(% of respondents who watch each service who rate service as moderate to very good quality)



Most Popular Video Bundles

(% of total respondents; Doesn't include Amazon, Check all that apply)





# Q2 VIDEO SPEND UP YOY; CONSUMERS CONTINUE TO SEE VALUE IN VIDEO DESPITE PRICE INCREASES AND BEING INCREASINGLY COST CONSCIOUS

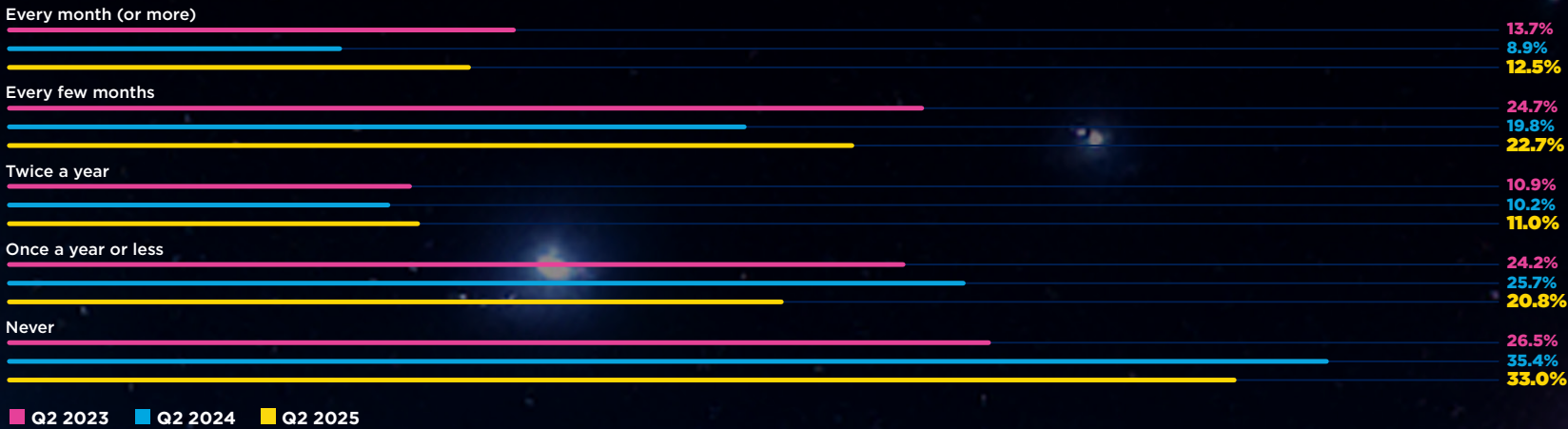


Average Monthly Spend on Video  
(% of all respondents)



Additionally, the frequency in which respondents look to adjust their spend has increased, with more than 1/3 noting that they evaluate their spending at least every few months.

Frequency of Spending Adjustment (% of all respondents)



Frequency of Spending Adjustment (% of all respondents within each income bracket)

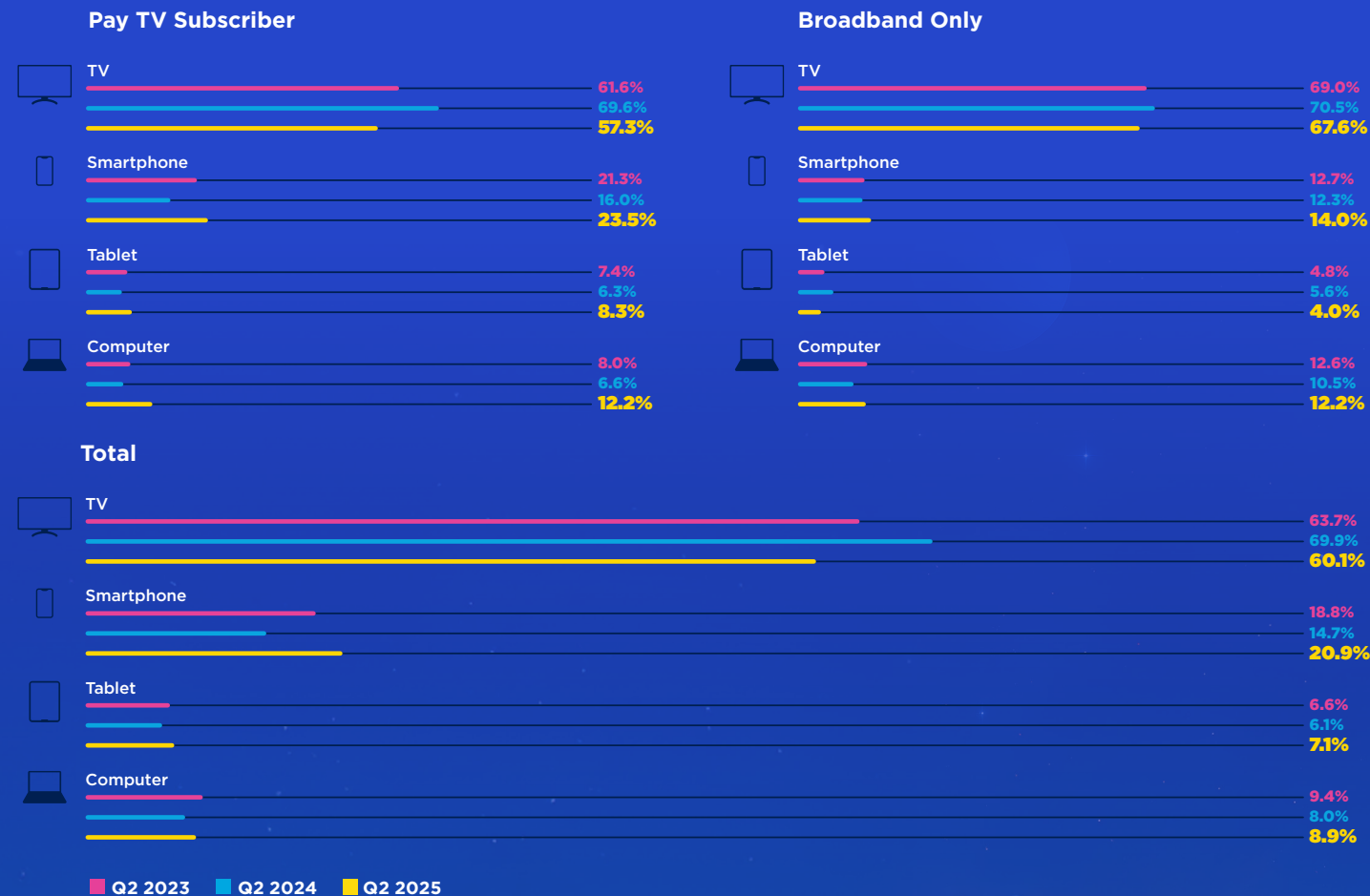




# TV'S ARE STILL THE FAVORITE DEVICE; SMARTPHONES PREFERRED BY ROUGHLY 20%

Respondents continue to prefer watching video on their TVs by almost a 3x margin.

**Favorite Devices to Watch Video**  
(% of all respondents)



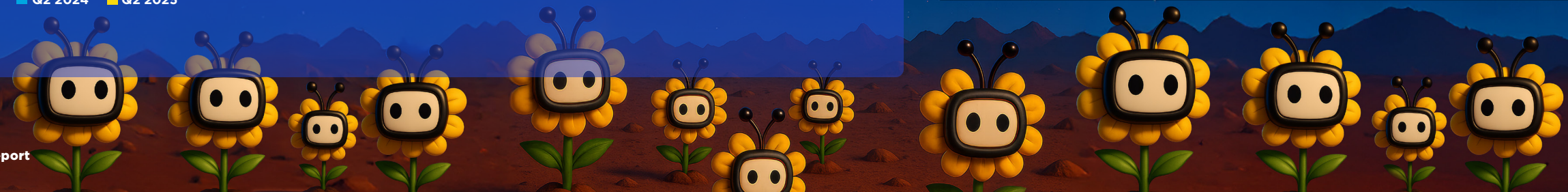
The ratio of short form and longform viewing has remained consistent across all devices.

**Breakdown of Viewing by Content Length**  
(% of all respondents, distribution between short and long-form on each device type)

## Short-form Video

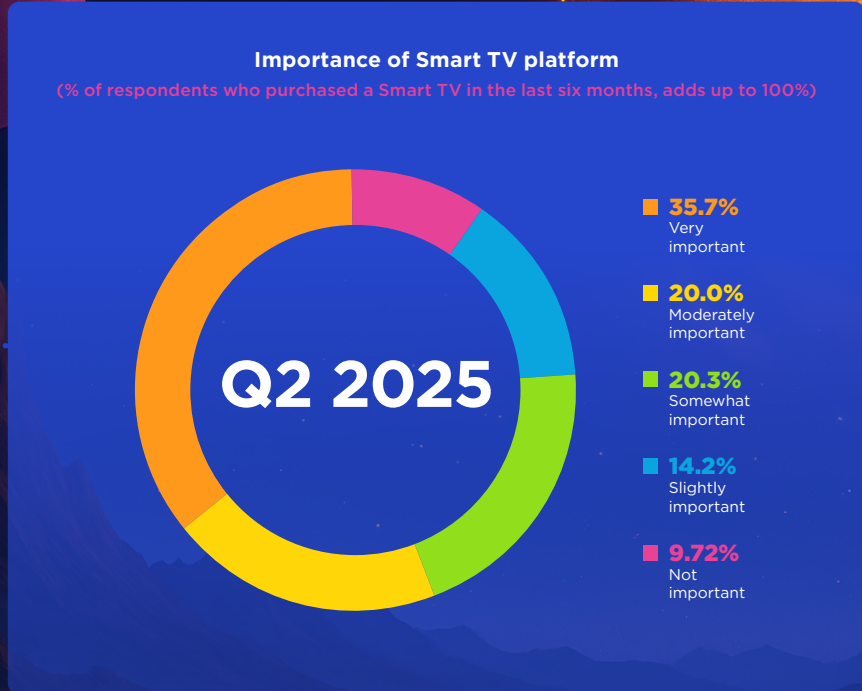
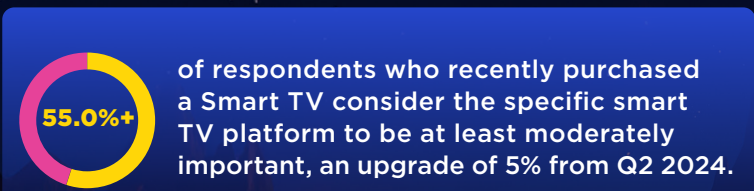
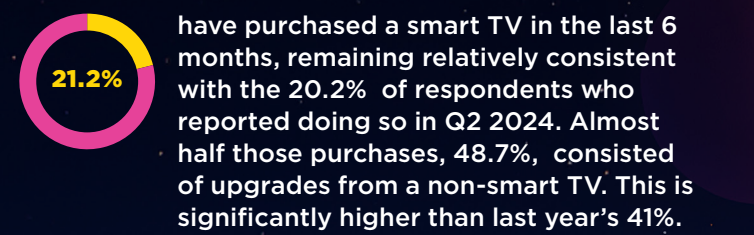


## Long-form Video





# SMART TV PLATFORMS BECOMING INCREASINGLY IMPORTANT PURCHASE DRIVER



21.6% of respondents are planning to buy smart TV in the next 6 months, this is an increase of 6% from 15.1% in Q2 2024. Of those who are planning to purchase a new Smart TV in the next 6 months, 52.8% of respondents are planning to add a new TV to their home. In contrast, 47.2% are planning to replace a TV. In 2024, the ratio was reversed, with 43.1% adding a TV to a new room or location and 56.9% planning to replace a TV they already had.

**Top Purchase Drivers Include:**  
(% of respondents who are planning to purchase a TV in the next 6 months)





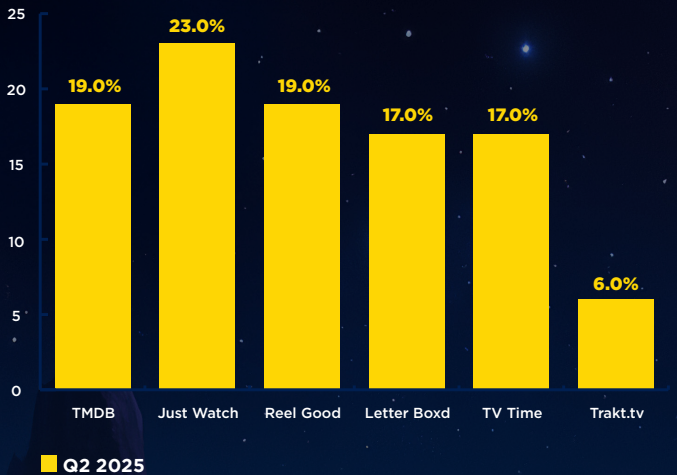
# 74% USE MULTIPLE APPS IN A SINGLE VIEWING SESSION; USAGE OF VOICE CONTROL GROWING AMONGST THOSE WHO HAVE IT

The percentage of respondents who use multiple apps in each viewing session has remained constant since Q2 2024, with 73.5% noting that they have to use multiple apps, compared to 72.7% in Q2 2024 and 60% in Q2 2023. Also, 40.2% noted that they use more than two apps in a single session. Over half of respondents (51.5%) find it annoying to browse multiple apps before settling on something to watch. This is up about 3% year-over-year.

## Companion Apps

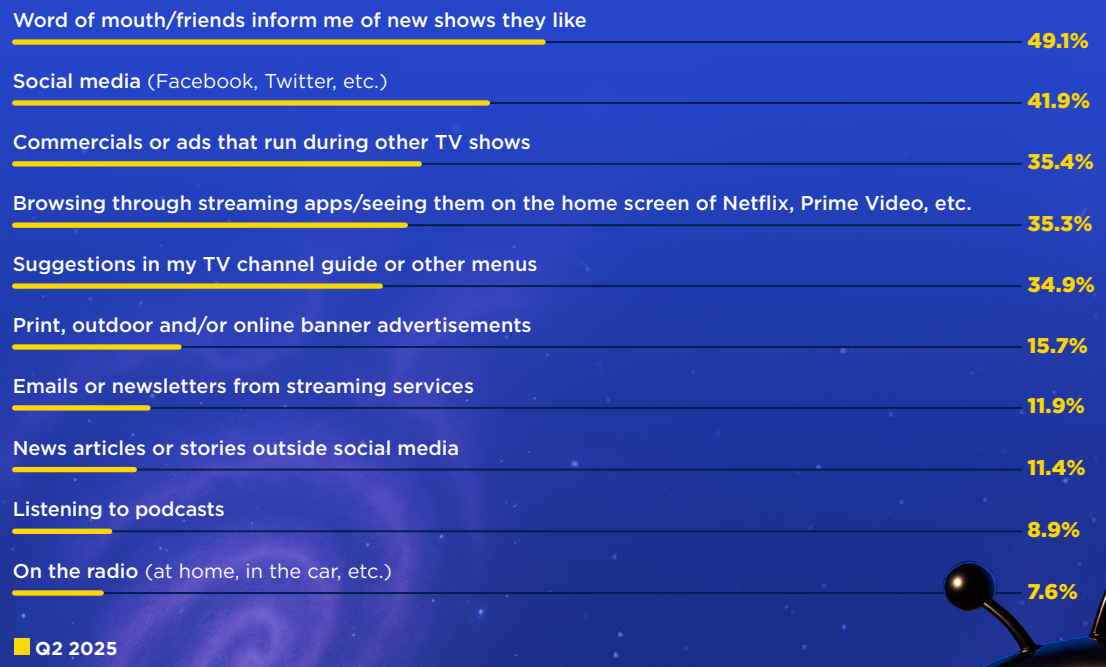
Usage of companion apps increased to 31.6% in Q2 2025, Excluding Amazon's IMDB (which is used by 39% of respondents), JustWatch remains the most commonly used companion app.

Most Commonly Used Companion Apps  
(% of respondents use, add up to 100%)



When it comes to discovery methods, the percentage of those who find out about new TV shows or movies from commercials has declined 5% year-over-year and over 14% since Q2 2022. In comparison, word of mouth continues and recommendations from friends continue to remain the most commonly used method of discovery.

Top Video Discovery Mediums  
(% of total respondents)



## Voice Controls

Voice control awareness and usage has increased year-over-year. 47.0% of respondents noted that they currently own an entertainment device that offers voice control, an increase of about 5% since this time last year. Among those whose devices offer voice control, 75.2% of respondents use this feature. This represents an increase of about 9% since Q2 2024.

Among those who do continue to utilize voice control, the frequency with which they do so has increased since spring 2024.

Frequency of Voice Control Usage  
(% of respondents who use voice control)





# DAILY VIEWERSHIP HAS A SEASONAL SPIKE TO OVER 5 HOURS

Respondents spend an average of over 5 hours per day viewing video content.  
This is up from 4.4 in Q2 2024.

The importance of local content has increased over the past year, with 61% noting that it is somewhat or very important compared to 54.8% in Q2 2024.

29.8% of all time spent watching video is spent watching local content, compared to 21% in Q2 2024 and 22.6% in Q2 2023.

Percentage of Viewing Time Spent On Each Service  
(% of all respondents)

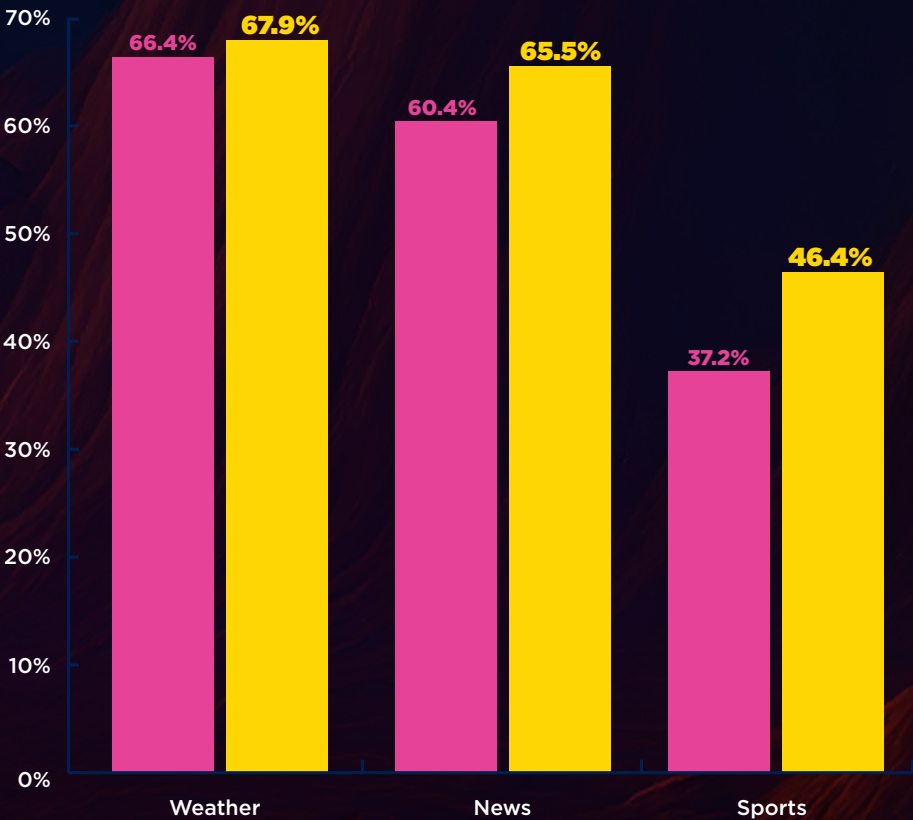
### Total



Q2 2023 Q2 2024 Q2 2025

### Importance of Local Content

(% of all respondents)



Q2 2024 Q2 2025



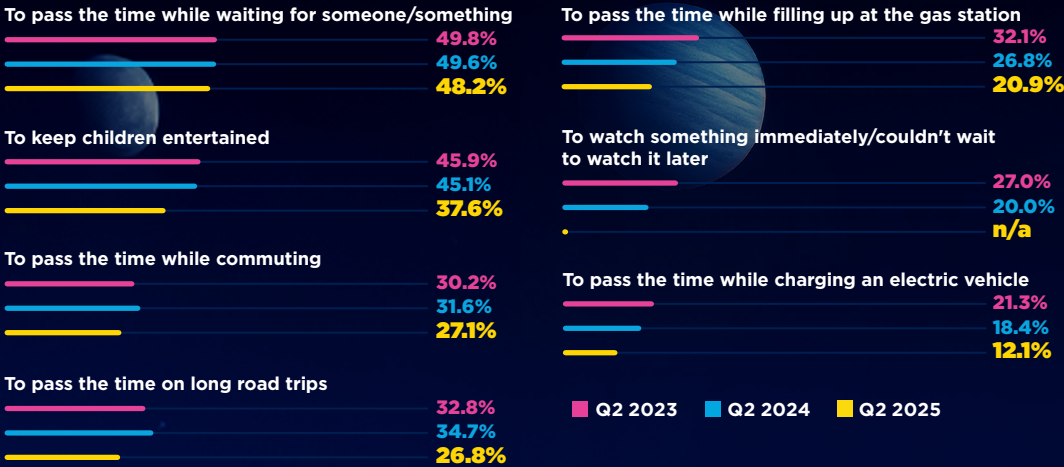


# IN-CAR VIDEO CONSUMPTION CONTINUES TO FLUCTUATE

47.9% of respondents of those with a car report watching video in the car, of which over 75% do so at least a few times a month (slightly less than the 79.3% reported in Q2 2024). Also, respondents who watch video in-car spend 56.7% watching short-form content and 43.3% watching longform, remaining consistent with last year's breakdown.

### Top Reasons for Watching Video In-Car

(% of respondents who purchased a Smart TV in the last six months, adds up to 100%)

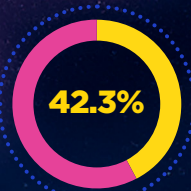
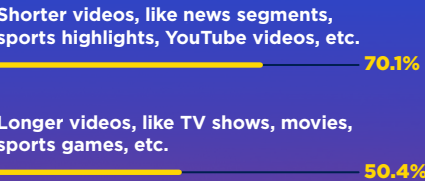


The number of electric vehicle owners grew considerably from last year. As a result, the number of those who watch video simultaneously while charging their vehicles dropped considerably to 18.8%

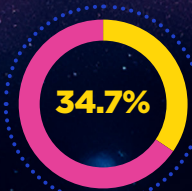
Of those who watch video while charging their vehicle, short videos such as those on YouTube or TikTok are the most commonly watched form.

### Types of video content watched while charging an electric vehicle

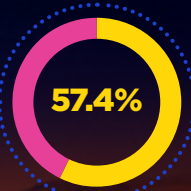
(% of respondents who watch video while charging, check all that apply)



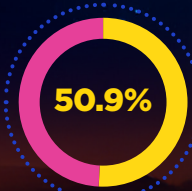
of those who watch in the car, do so while in the rear passenger seat.



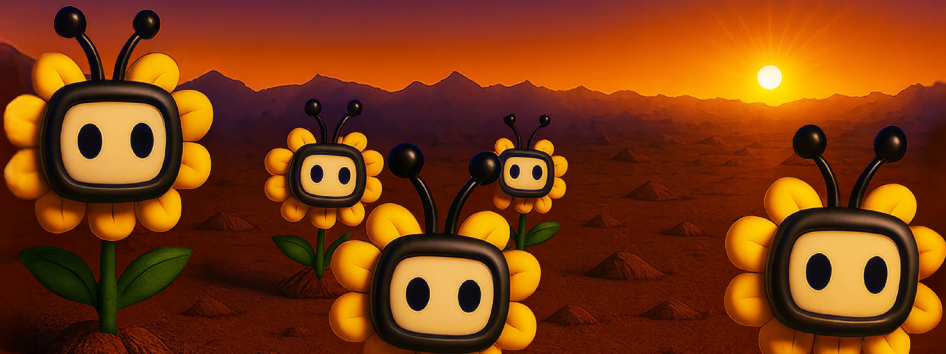
of content is watched on a smartphone, 11.6% on the main display in the front cabin, and 27% on a tablet.



of those who watch in the car, do so while in the front passenger seat.



of content is watched on a smartphone, 18.8% on the main display in the front cabin, and 19.6% on a tablet.





# PAY TV CHURN STILL CONSIDERABLE

Screen Distribution of Pay-TV Content  
(% of all respondents who use Pay-TV)



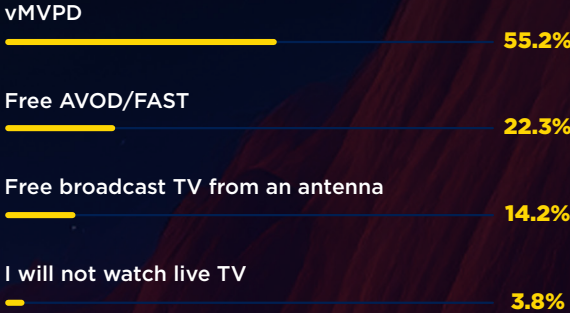
22.5% of respondents plan to cut the cord within the next 6 months. This is an increase of about 3%, from 19.6% in Q2 2024. When asked about top concerns when considering cutting the cord, respondents continue to express the most concern around getting all of the entertainment that they want.

Top Concerns for Respondents Considering Cutting The Cord  
(% of respondents who are planning to cancel Pay-TV service, check all that apply)



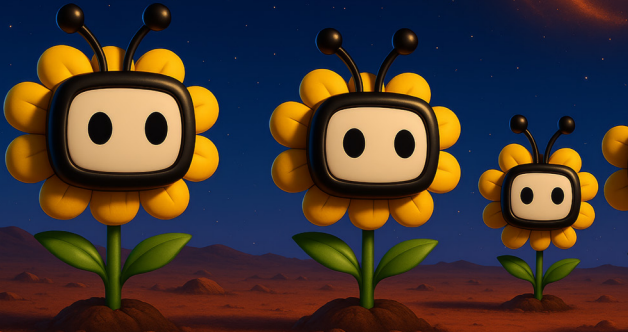
When it comes to potential cord cutters' preferred methods for watching live TV without cable, most still express a preference for a live TV streaming service, with the distribution of prospective methods remaining relatively consistent.

Prospective Methods for Potential Cord Cutter  
(% of respondents planning to cancel Pay-TV service)



39.1% of Pay-TV content is consumed during primetime, with 16.9% of Pay-TV content consumed during the morning. This is a significant decrease in primetime viewing, from 46.3% and an increase in morning viewing from 14.3% in Q2 2024

The share of respondents who cut the cord but later decided to resubscribe to a traditional TV service has increased about 10%, to 31.9% in Q2 2025.





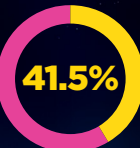
# MORE THAN 60% REPORT HOLDING SVODS FOR LESS THAN A YEAR; IS A “REVOLT” BREWING?



Screen Distribution of SVOD Content  
(% of total respondents who use SVOD)



Q2 2025



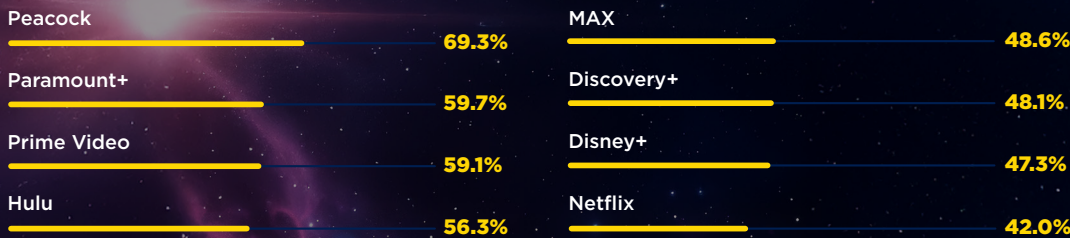
41.5% of SVOD content is consumed during primetime, with 15.5% of SVOD content consumed during the morning. Compared to 48.6% and 11% in Q2 2024.



87.0% of respondents utilize SVOD services compared to 83.8% in Q2 2024 and 88% in Q2 2023. At the same time, SVOD churn appears to have increased, with 25.4% of respondents having canceled a service in the last 6 months and 28.7% of all respondents started subscribing to a new service. In spring of 2024, 18.5% noted canceling and 19.2% started subscribing to a new service.

As expected, the usage of ad-supported versions of SVOD services continues to increase slightly year-over-year.

Usage of Ad-supported SVOD Tiers  
(share of respondents who use ad-version of each service out)



Consumers appear to be spending less time with new SVOD services, with respondents noting that they usually subscribe to a new service for over one year dropping below 40% for the first time.

Length Respondents Stick with New SVOD Services

(% of respondents who subscribe to SVOD service)



Top Reasons for Subscribing to a New SVOD Service

(% of respondents who subscribed to new service in last 6 months)





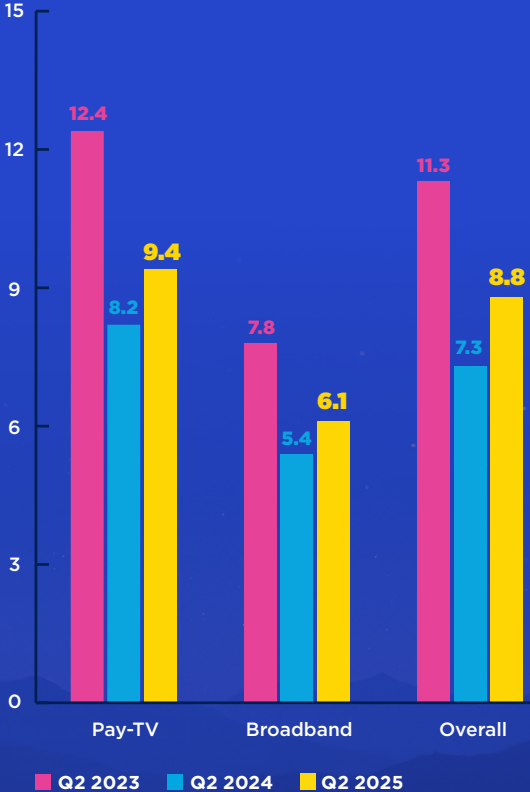
# TVOD ECOSYSTEM HOLDS TRUE; AMAZON STILL AT THE HELM

Top TVOD Services  
(% of respondents who use TVOD)



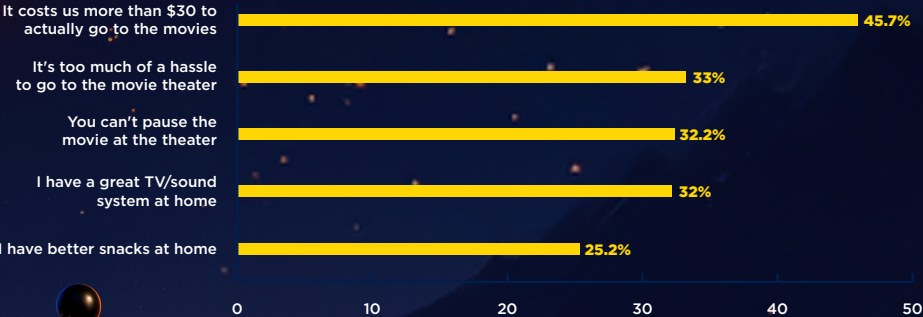
The share of Pay-TV subscribers utilizing TVOD services has returned to 2023 levels, with 53.2% of Pay-TV subscribers utilizing TVOD services, compared to 45.7% in Q2 2024 and 54.3% in Q2 2023. Broadband only subscribers TVOD usage has declined about 6%, to 34.8% in Q2 2025 compared to 41.3% in Q2 2024 and 41.9% in Q2 2023. 48.1% of respondents use a TVOD service compared to 44.1% who used a TVOD service in Q2 2024.

Number of TVOD purchases per year  
(% of all respondents that use TVOD)



Only 32.8% of respondents noted that they will most likely see a new movie in the theater, compared to 55.2% who would most likely wait to stream it. Both numbers have remained relatively consistent year-over-year.

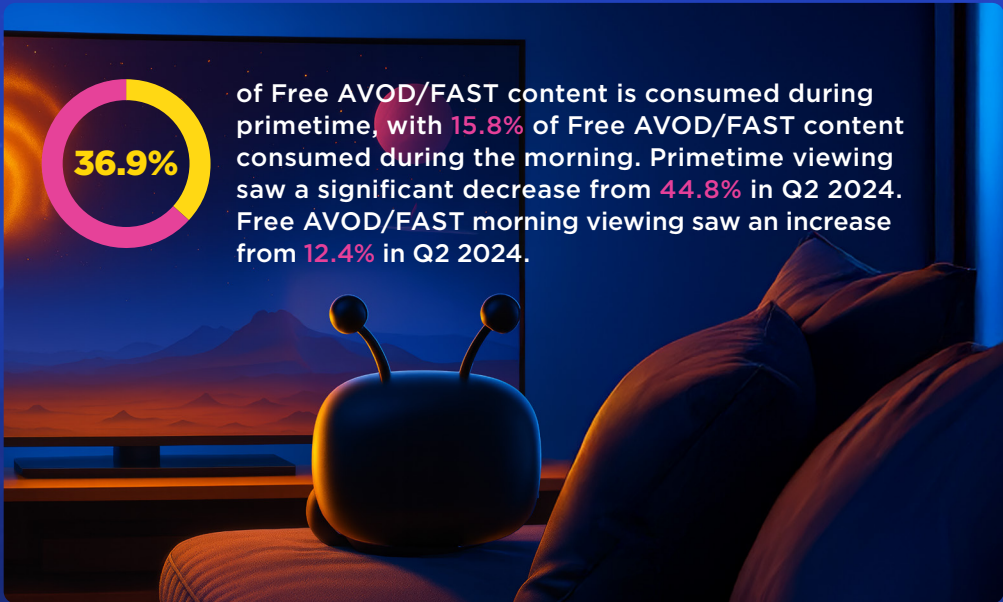
Reasons Respondents prefer to stream new releases at home  
(% of total respondents)





# FREE AVOD/FAST ADOPTION UP 8% YEAR-OVER-YEAR; AVERAGE FAST CHANNELS WATCHED GOES FROM 5 TO 9

Screen Distribution of Free AVOD/FAST Content  
(of those respondents who watch Free AVOD/FAST)



69.9% of respondents noted using at least one Free AVOD/FAST service in Q2, an increase of about 8% year-over-year.

Top Free AVOD/FAST Services  
(% of respondents who use free AVOD/FAST)



75.3% of all Free AVOD/FAST viewers noted watching some form of free live streaming TV or FAST channels which in Q2 2025 accounts for roughly 55% the viewing time of all Free AVOD/FAST services.

Breakdown of FAST Consumption by Channel Type  
(% of respondents who use Free AVOD/FAST to watch live TV channels)



Respondents watch an average of 9 different FAST channels, almost double last year's 5.





# MORE THAN 1/3 OF SOCIAL VIDEO BEING WATCHED ON TVS

79.0% of respondents watch video via their social media and/or user generated content networks, remaining consistent year-over-year. 56.9% of time spent viewing social video is user-generated content, a decline of 12% from this time last year.

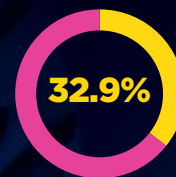
## Top Social Video/UGC Services

(% of respondents who watch Social Video/UGC content)



## Screen Distribution of Social Video / UGC Consumption

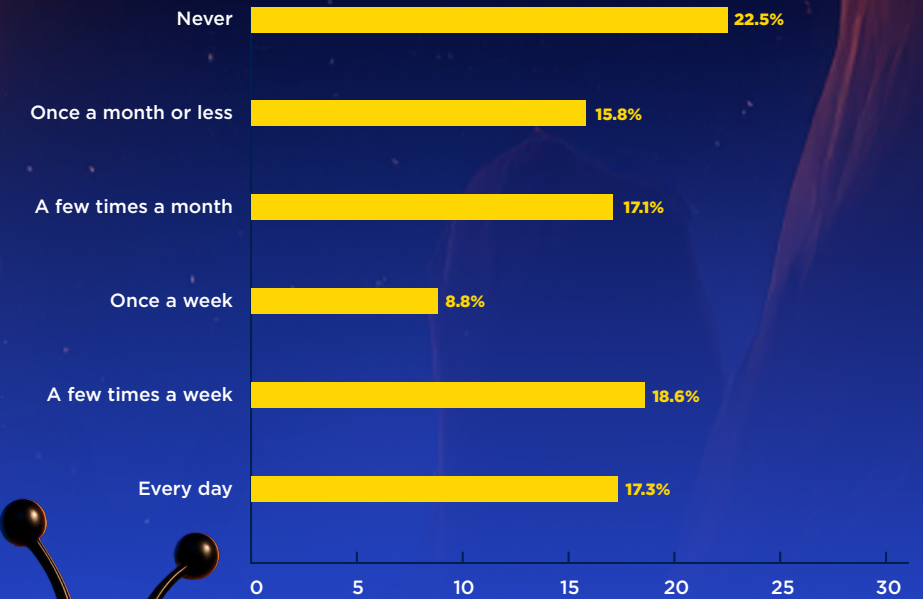
(% of respondents who watch Social Video/UGC content)



of social video is consumed during primetime, with 17.1% of social video consumed during the morning. Compared to 39.6% and 13.2% respectively in Q2 2024. during the morning. Primetime viewing saw a significant decrease from 44.8% in Q2 2024. AVOD morning viewing saw an increase from 12.4% in Q2 2024.

## Frequency of Social Video/UGC Consumption on TV

(% of respondents who watch Social Video/UGC content)





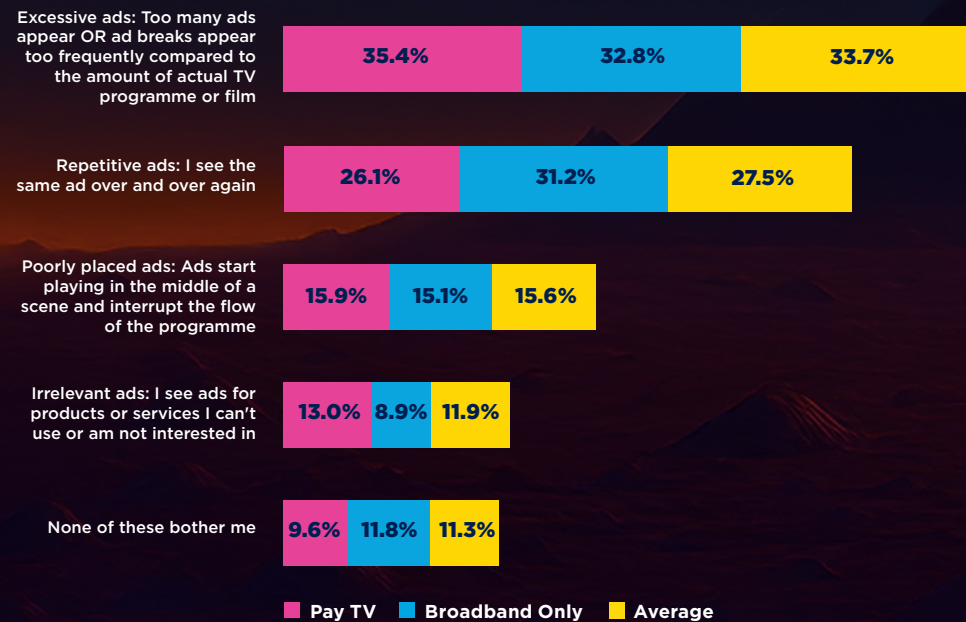
# AD TOLERANCE REMAINS CONSISTENT; MAJORITY SHOW AN INTEREST IN SHOPPABLE ADS

Consumers' ad tolerance has remained largely consistent year over year, with about 75% of all respondents noting that they are at least tolerant of ads.

## Breakdown of Ad Perception (% of all respondents)

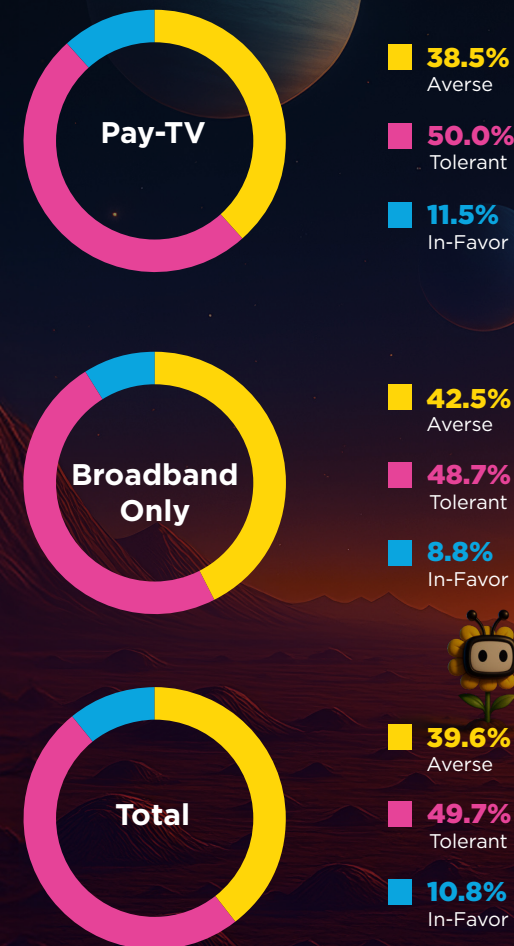


## Biggest Ad Annoyance (% of total respondents)



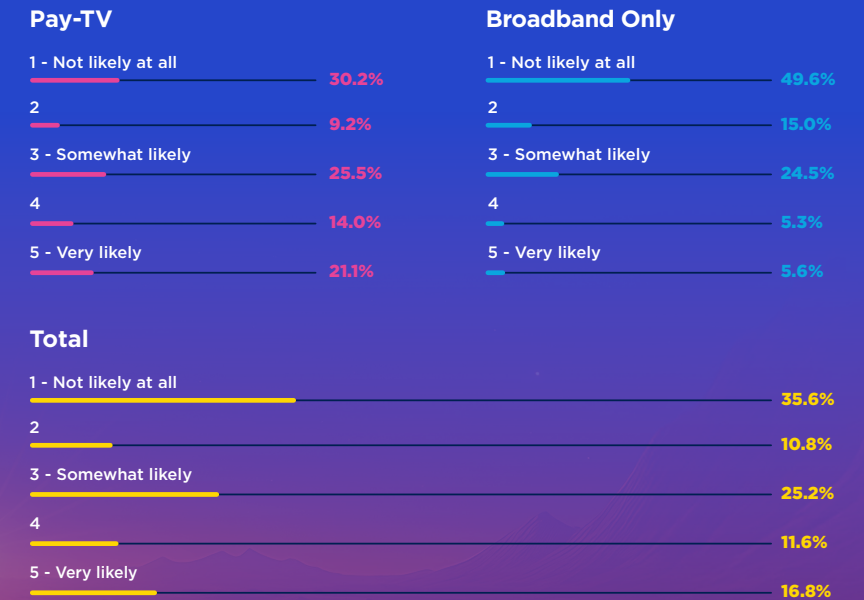
60.5% of respondents report feeling tolerant or in favor of ads appearing simultaneously on their screen when watching video.

## Respondents attitude towards ads that appear simultaneously when watching video (% of all respondents)



Over half (53.6%) all respondents say they're somewhat likely or likely to buy something directly off TV screen, skewing heavily towards Pay TV Subscribers

## Respondents likelihood of buying something directly off TV screen (% of all respondents)





# CONCLUSION

TiVo seeks real consumer opinions to uncover key trends relevant to TV providers, digital publishers, advertisers and consumer electronics manufacturers for our survey, which is administered and examined biannually in this published report. We share perspectives and feedback from viewers to give video service providers and industry stakeholders insights for improving and enhancing the overall TV viewing experience for consumers. TiVo has conducted a survey quarterly or biannually since 2012, enabling us to monitor, track and identify key trends in viewing habits. Additionally, we've compiled opinions about Subscription Video on Demand (SVOD), Transactional Video on Demand (TVOD) and Advertising-Based Video on Demand (AVOD) providers, emerging technologies, connected devices, over-the-top (OTT) apps and content discovery features, including personalized recommendations and search.

TiVo brings entertainment together, making it easy to find, watch and enjoy. We serve up the best movies, shows and videos from across live TV, on-demand, streaming services and countless apps, helping people to watch on their terms. For studios, networks and advertisers, TiVo targets a passionate group of watchers to increase viewership and engagement across all screens. TiVo is a wholly-owned subsidiary of Xperi Inc.

Go to [tivo.com](https://tivo.com) and enjoy watching.

Learn more at [business.tivo.com](https://business.tivo.com).

For more about this report, please contact [media@xperi.com](mailto:media@xperi.com).

Visit TiVo on [LinkedIn](https://www.linkedin.com/company/tivo).

# GLOSSARY

- Pay-TV**  
Services that aggregate live and on-demand linear television distributed over a cable, satellite, or managed IPTV platform
- vMVPD**  
Virtual Multichannel Video Programming Distributor. Services that aggregate live and on-demand linear television distributed over the internet (also known as a “skinny bundle”)
- Free AVOD/FAST**  
Free Advertising-Based Video on Demand services, or, Free Ad-on-demand streaming content with the inclusion of ads
- Social Video / UGC**  
User-generated content (UGC) and/or other video delivered through a social media network
- SVOD**  
Subscription video on Demand. Services offering on-demand streaming content in which users pay a subscription fee
- TVOD**  
transactional Video on Demand. Services offering streaming content for purchase or rental on a pay-per-view basis
- Pay-TV Subscribers**  
Individuals who currently have a subscription to a Pay-TV service provider
- Broadband-Only Subscribers**  
Individuals who don't currently have a Pay-TV subscription, but have a subscription to a broadband internet service provider

# METHODOLOGY

- Q2 2025 Survey Size  
**4,510**
- Geographic Regions  
**U.S., Canada**
- Age of Respondents  
**18+**

*This survey was designed by TiVo and conducted in Q2 2025 by a leading third-party survey service; TiVo evaluates the results and publishes this biannual report analyzing key trends across the TV industry.*

