



TREND REPORT: EVOLVING STREAMER STRATEGIES

**Global consumer insights in the era of
maximising profitability**

APRIL 2025

Overview

Throughout 2024, the global streaming industry doubled down on key strategic pivots in the quest to maximise streaming profitability.

In this report, we examine these strategies by revealing global consumer insights related to the evolving ad-supported space in Premium SVOD, Netflix's live programming initiative, and the role that YouTube is playing in this new streaming landscape.

Contents

- Ads on Premium SVOD
- Live Events on Netflix
- The Rise of YouTube
- Conclusion



Ads on Premium SVOD

It is a little more than five years since Netflix CEO Reed Hastings told investors that the streaming giant had no plans to pursue an advertising-based subscription model. Jump ahead to 2025 and nearly every Premium SVOD service, Netflix included, has since launched ad-supported plans to diversify their revenue streams in an increasingly crowded market.

As the SVOD market matures, ad-supported plans offered at lower price points form a key global streamer strategy amid the shift in priority from streaming growth to profitability.

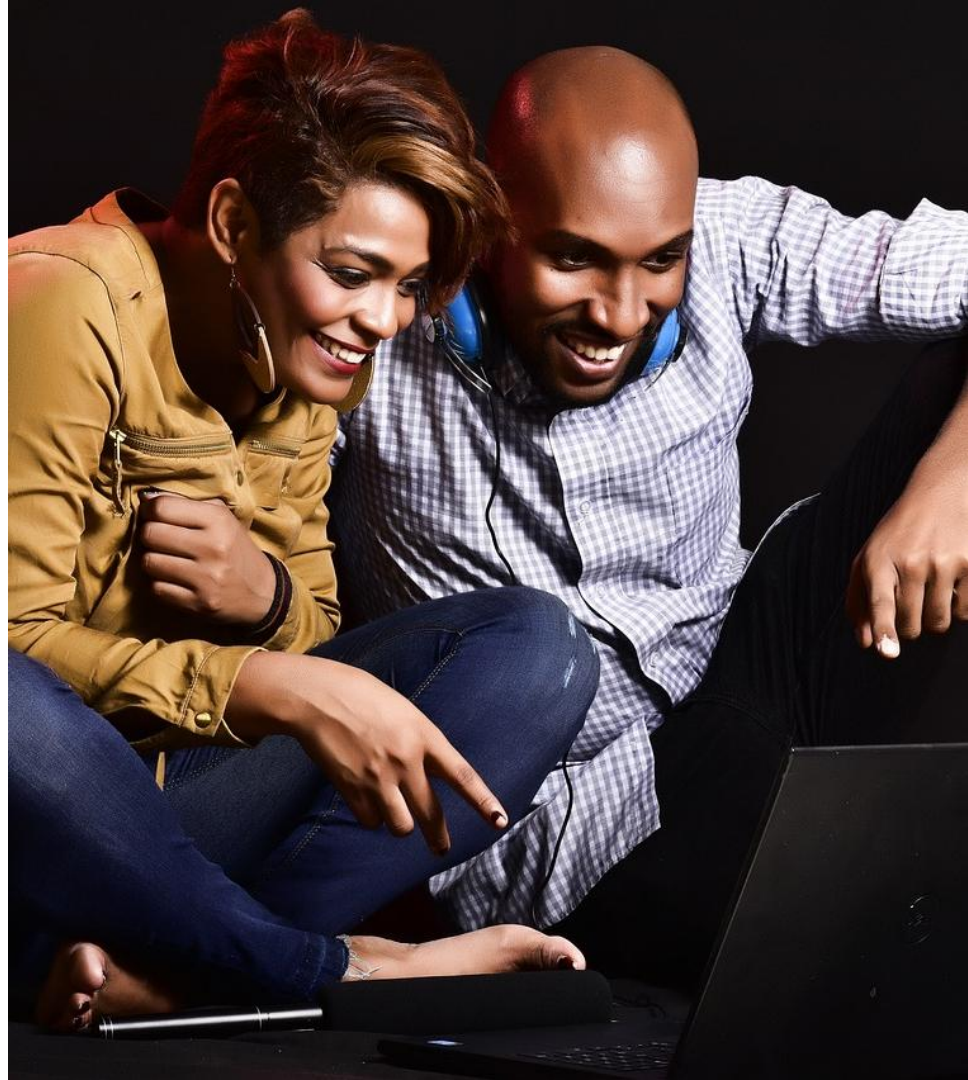


It All Ads Up

Major global streamers approach advertising in different ways

From Prime Video's 'ads-by-default' strategy to Netflix's swapping subscribers of its now-defunct 'Basic' plan to 'Standard with Ads', each major global service has employed a different strategy to the roll-out of their ad-supported products.

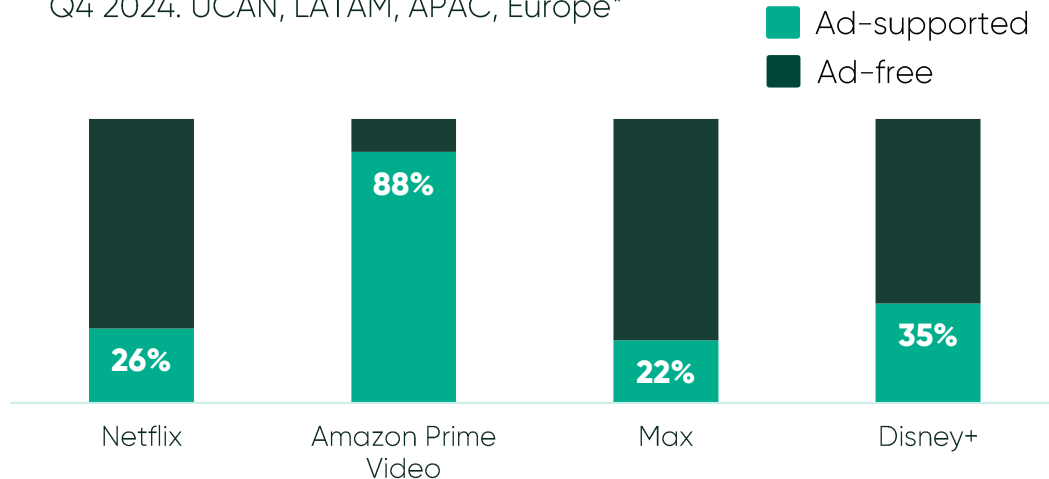
In this section, we look at how audiences engage with ad-supported plans, what they watch, and examine how Netflix has grown their global ad-supported base.





Amazon Dominates SVOD Ad Market

Ad-supported vs Ad-free: Share of Active Users on Netflix, Disney+, Max, Amazon Prime Video. Q4 2024. UCAN, LATAM, APAC, Europe*



88% of Prime Video subs watched ads in Q4 2024

By placing all Prime Video users on its ad-supported plan by default, Amazon established the largest ad-supported base in global Premium SVOD.

Among the remaining measured streamers, Disney+ leads with **35%** of global subscribers on ad-supported plans.

*Digital i measurement territories include: U.S., Canada, Mexico, Colombia, Brazil, Argentina, Australia, Japan, South Korea, Poland, the Netherlands, Norway, Denmark, Finland, Sweden, UK, France, Italy, Germany, Spain



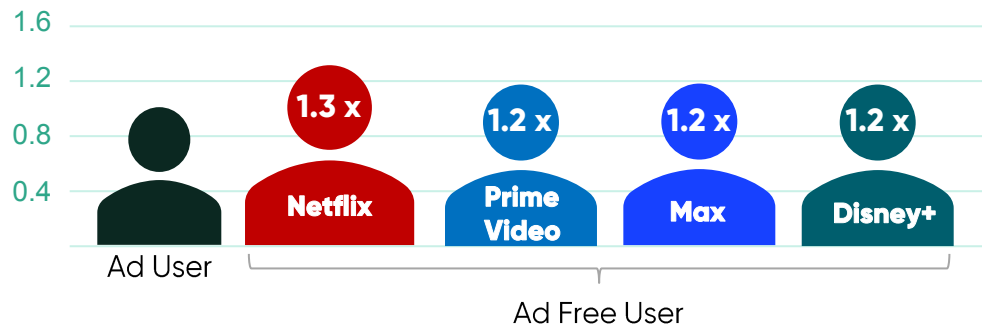
Ad-Free Users Consume More Content

Average Netflix ad-free viewing outstrips ad-supported minutes

Across all services measured, accounts on ad-free plans watched more on average per day than ad-supported counterparts during Q4 2024.

This difference was greatest on Netflix, where ad-free users watched an average of **24 minutes** above ad-supported plans, with other streamers showing less variation in daily minutes between plans.

Consumption Index: How much more do ad-free users watch per day than ad-supported users?
Netflix, Disney+, Max, Amazon Prime Video. Q4 2024.
UCAN, LATAM, APAC, Europe*

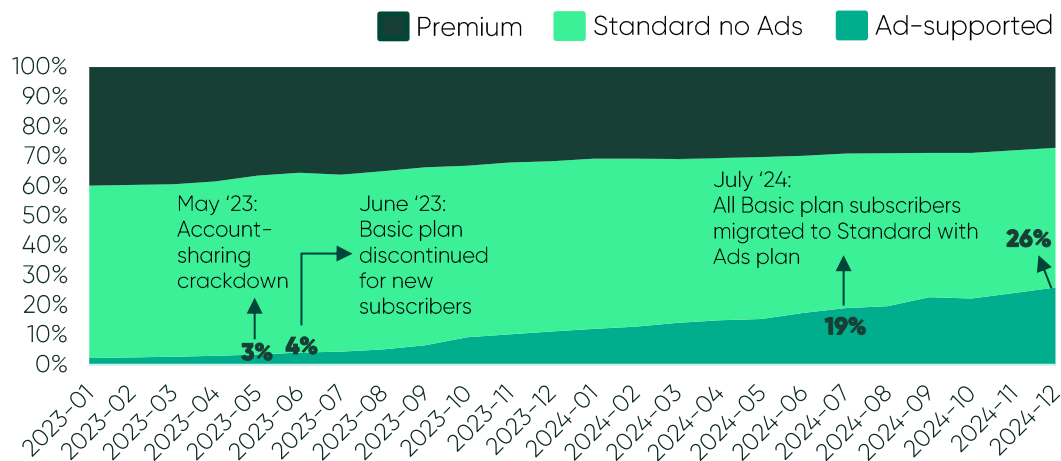


*Digital measurement territories include: U.S., Canada, Mexico, Colombia, Brazil, Argentina, Australia, Japan, South Korea, Poland, the Netherlands, Norway, Denmark, Finland, Sweden, UK, France, Italy, Germany, Spain



Netflix Ad-Supported Subs Growth

Ad-supported vs Ad-free: Share of Monthly Active Users on Netflix, 2023 – 2024, UCAN, LATAM, APAC, Europe*



Netflix ad-supported subs more than doubled in 2024

Between July 2023 and July 2024, the number of ad-supported Netflix subscribers **increased fourfold**, following Netflix's account-sharing crackdown and the discontinuation of the Basic plan for new subscribers. By the end of 2024, Netflix ad-supported users accounted for **26%** of global subscribers to the service.

*Digital measurement territories include: U.S., Canada, Mexico, Colombia, Brazil, Argentina, Australia, Japan, South Korea, Poland, the Netherlands, Norway, Denmark, Finland, Sweden, UK, France, Italy, Germany, Spain

Content Trends and Ads

As the following chart shows, Amazon's strategy of moving all Prime Video users onto an ad-supported plan by default has accrued a significant share of hours viewed for several of its titles on these accounts, such as *Cross* and *The Lord of the Rings: The Rings of Power*.

It is also noteworthy that **37%** of viewing to *Grey's Anatomy* on Disney+ in Q4 2024 came from ad-supported accounts. Meanwhile, the top show in terms of hours viewed for both ad-supported and ad-free subscribers was *Squid Game* for which **23%** of viewing time came from ad-supported accounts.





Top Shows for Ad-Supported Subs

Top Titles by Hours Viewed for Ad-Supported Accounts on Netflix, Prime Video, Max, Disney+, Q4 2024. UCAN, LATAM, APAC, Europe*

Ad-supported Rank	All Accounts Rank	Title	Platform	Share of Hours Viewed from Ad-supported
1	1	Squid Game	Netflix	23%
2	11	Grey's Anatomy	Disney+	37%
3	39	Cross	Amazon Prime Video	71%
4	37	The Lord of the Rings: Rings of Power	Amazon Prime Video	67%
5	3	Jake Paul vs Mike Tyson	Netflix	21%
6	5	Prison Break	Netflix	19%
7	56	Red One	Amazon Prime Video	71%
8	6	The Lincoln Lawyer	Netflix	19%
9	2	The Resident	Netflix	14%
10	8	Lost	Netflix	17%

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Live Events on Netflix

Live programming is a relatively new frontier for global streaming services, but one that is growing increasingly important as these platforms seek to differentiate their offerings and combat churn.

For Netflix, the push into live streaming goes hand in hand with creation of ad-supported tiers, because it is being led by sports events, which carry advertising, even on ad-free packages.

Live sports provides Netflix with another way to generate advertising revenue, while also driving concurrent streams to the service, as can be seen in the following section.



Right Hook

Sports programming is the driving engine of the push into live events

As this section of the report shows, Netflix's one-two punch of the *Jake Paul vs. Mike Tyson* fight and the NFL games at the end of last year was a big draw for subscribers.

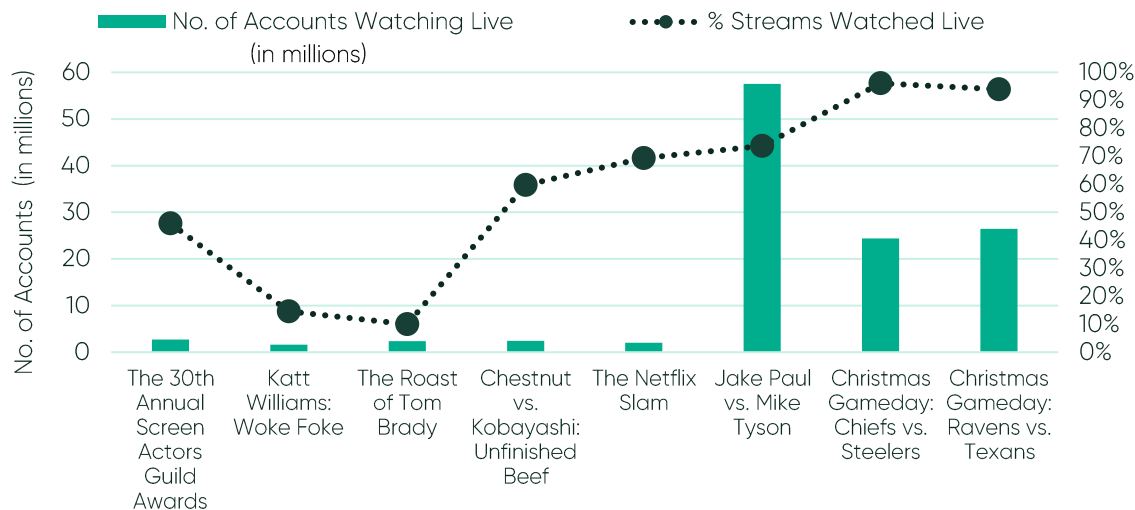
Not only did audiences watch the live sporting events – they watched live – with many new users signing up to live stream the events.



Sports Drives Live Viewing



Top Netflix Live Events by No. of Accounts Watching Live, 2024, UCAN, LATAM, Europe, APAC*



Fighting for eyeballs

Until **over 57 million accounts** watched the *Jake Paul vs. Mike Tyson* fight, live viewing on Netflix was modest.

Sports encouraged live viewing, whereas comedy specials like *The Roast of Tom Brady* were watched largely after the fact.

Over 94% of the Christmas NFL games was live viewing, reflecting the importance of live viewing for sports fans.

*Digital measurement territories include: U.S., Canada, Mexico, Colombia, Brazil, Argentina, Australia, Japan, South Korea, Poland, the Netherlands, Norway, Denmark, Finland, Sweden, UK, France, Italy, Germany, Spain



Live Sports Drives New Sign-Ups

Top First Titles Watched by New Subscribers, Netflix in Q4 2024, UCAN, LATAM, APAC, Europe*

Rank	Title	No. of New Subscriber Accounts
1	Jake Paul vs. Mike Tyson	457,000
2	Squid Game	410,000
3	Arcane	271,000
4	NFL Christmas Gameday: Chiefs vs. Steelers	249,000
5	Cobra Kai	194,000

Fighting for Subscribers

Jake Paul vs. Mike Tyson and the Christmas NFL games were the first titles watched by 457,000 and 249,000 new Netflix subscribers during Q4 2024, respectively.

Squid Game was also a key subscription driver for Netflix in Q4 2024, for **410,000 new subscribers** it was the first show that they watched.

*Digital measurement territories include: U.S., Canada, Mexico, Colombia, Brazil, Argentina, Australia, Japan, South Korea, Poland, the Netherlands, Norway, Denmark, Finland, Sweden, UK, France, Italy, Germany, Spain

The Rise of YouTube

There is currently much discourse around the growing prominence and importance of YouTube and its future both as a platform for digital content consumption and as a marketing tool. Much of this conversation relates to its perceived move from video-sharing site to long-form content platform and how it has now been positioned as a direct competitor to global streaming services.

In this section, we explore how long-form viewing is increasing on YouTube, as well as how viewing time to YouTube compares with viewing time to Netflix across key global markets.

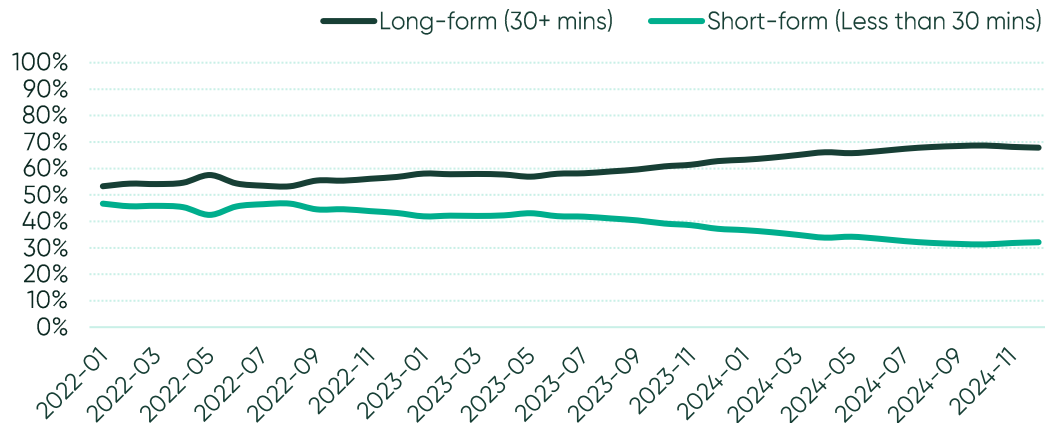
Finally, we will examine the reasons for which global streaming companies are increasingly looking to collaborate with YouTube creators by revealing how younger viewers are consuming content.



Long-Form Viewing Rises



Share of Viewing Time – Long-form vs. Short-form
Content on YouTube, 2022 – 2024, UCAN, LATAM,
APAC, Europe*



Long-form is gaining ground

Since the start of 2022, the proportion of viewing to long-form content (30+ mins) on YouTube has been rising.

In January 2022, **long-form accounted for 53%** of total YouTube viewing time in all measured regions.

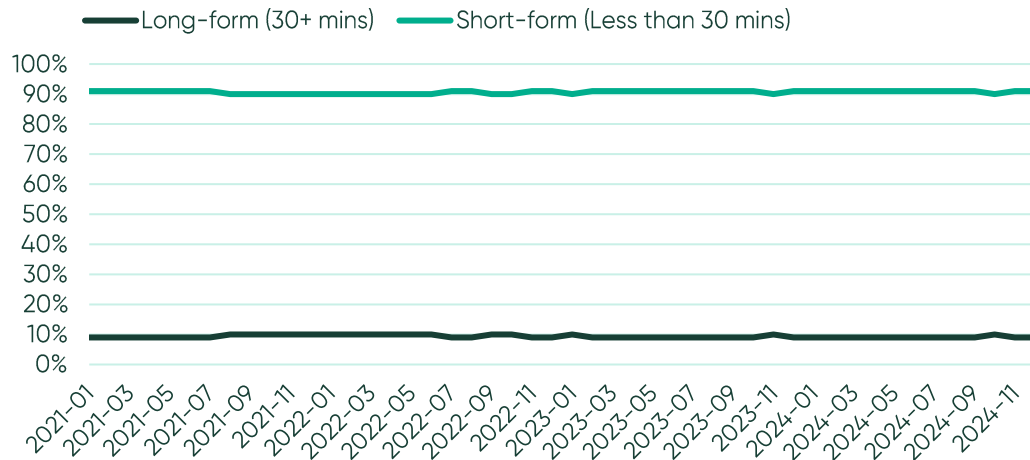
As of December 2024, this **had risen to 68%**, an **increase of 15 percentage points** in that time.

*Digital i measurement territories include: U.S., Canada, Mexico, Brazil, Australia, Japan, South Korea, Poland, the Netherlands, Norway, Denmark, Finland, Sweden, UK, France, Italy, Germany, Spain



YouTube Still King of Short-Form

Share of Streams – Long-form vs. Short-form
Content on YouTube, 2022 – 2024, UCAN, LATAM,
APAC, Europe*



Short-form still holds value

While the proportion of viewing time spent on long-form content is rising, consumers still choose short-form over long-form **9 times out of 10**.

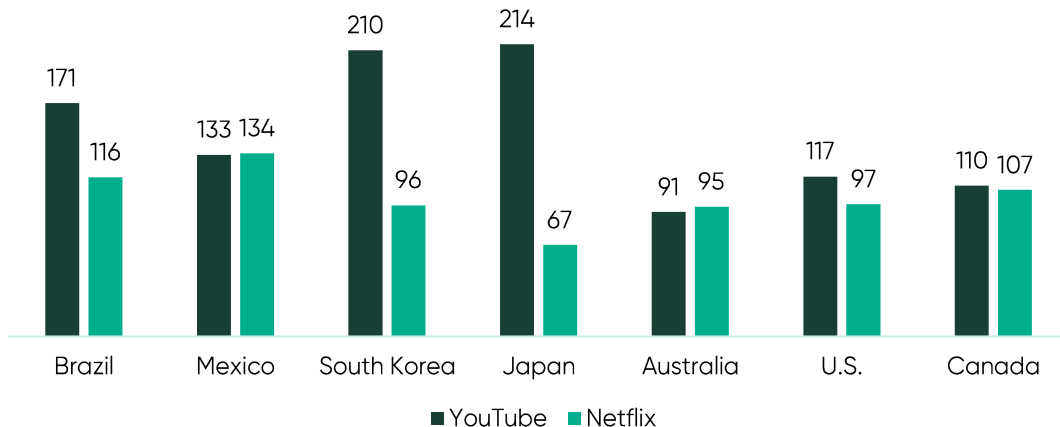
Over the past three years, the number of streams** to short-form content on YouTube has remained at a consistent level of about **90% of the total number** of videos streamed.

*Digital i measurement territories include: U.S., Canada, Mexico, Brazil, Australia, Japan, South Korea, Poland, the Netherlands, Norway, Denmark, Finland, Sweden, UK, France, Italy, Germany, Spain



YouTube in APAC and the Americas

Average Daily Minutes of Active YouTube and Netflix Accounts
– LATAM, APAC & UCAN, Q4 2024



Japan Leads YouTube Viewing

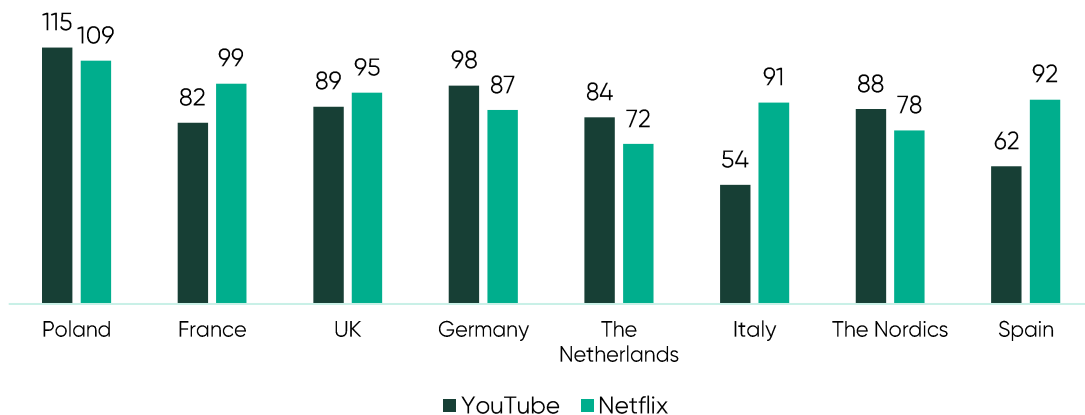
Japan and Korea have the highest average daily YouTube usage of all the measured countries, clocking in **214 and 210 minutes** respectively in Q4 2024.

Japan also has the lowest average daily Netflix usage of all countries measured with just **67 average daily minutes** in the period.

YouTube in European Markets



Average Daily Minutes of Active YouTube and Netflix Accounts
– Europe, Q4 2024



Italian and Spanish Audiences Prefer Netflix

Italy recorded the lowest consumption, where users averaged less than an hour per day on YouTube. In Spain, active users viewed **62 minutes per day** of YouTube and **92 minutes per day** of Netflix.

Youth Vote

How 18-24-year-olds are using YouTube in the UK

YouTube is by no means a new kid on the block, but the way it is now being utilised has repositioned it as a major player whose influence will only grow.

In this section, we use the UK as a case study to examine how younger viewers engage with YouTube.

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“YouTube has become an integral part of how younger audiences consume content. The challenge for the industry now is understanding how to respond to this fragmented, highly personalised viewing behaviour in a meaningful way.”

Matt Ross

Chief Analytics Officer

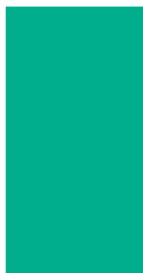




Young UK Viewers: YouTube vs Netflix

Average Daily Minutes of Active YouTube and Netflix Accounts owned by 18-24-year-olds in the UK, Q4 2024

108 mins



YouTube

98 mins



Netflix

UK Young Adults Prefer YouTube

18-24-year-olds in the UK spend approximately **108 minutes per day** watching content on their own YouTube.

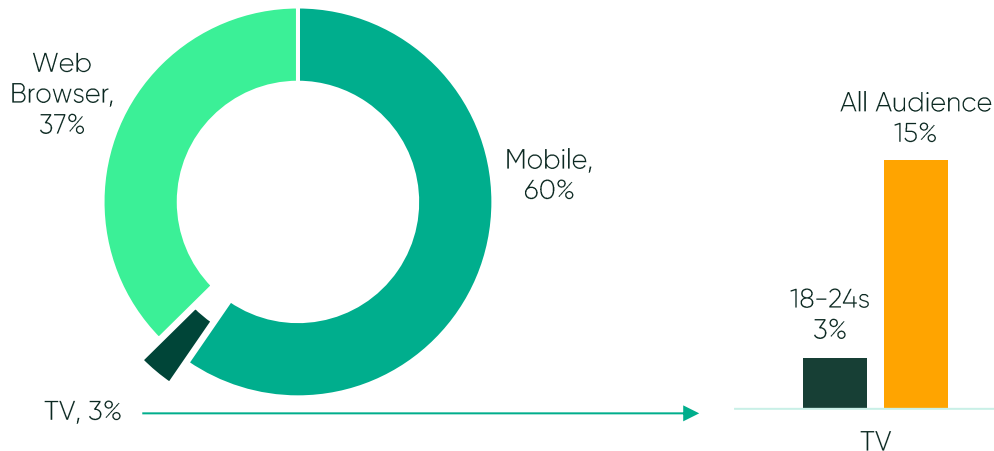
Their daily viewing time on Netflix is considerably lower. In Q4 2024, this audience watched about **98 minutes per day** via their own Netflix accounts*.

*This analysis looks at 18-24-year-old Netflix account users and their usage of their own YouTube accounts, it does not include viewing on a shared Netflix or YouTube account that belongs to someone out of this age group.

UK Young Adults Switch off TV



Share of Streams for 18-24s on YouTube by Device* in the UK, Q4 2024



Watching on the Small Screen

Mobile was the preferred device for watching YouTube content among 18-24-year-olds in the UK during Q4 2024. In Q4 2024, **60% of YouTube video streams** by 18-24s in the UK took place on mobile devices, while **37%** was through web browsers.

Only **3% of YouTube video streams** occurred via TV, highlighting a clear disconnect between younger audiences and TV screens for YouTube consumption.

*Only includes viewing through accounts owned by 18-24-year-olds, any viewing that takes place on another person's account is not included.

Conclusion

The move to live sports programming and the launch of ad-supported plans to bring in new and returning subscribers and diversify revenue streams appears to be paying off.

As our report shows, the adoption of ad-supported is growing – or in the case of Prime Video, those placed on the plan have remained there in overwhelming numbers. Sports is driving the live push, through events that draw significant concurrent viewing and pull double duty as another way to generate advertising revenue.

YouTube is gaining ground with long-form content, and in certain key markets viewers are watching more YouTube than Netflix. In the UK, YouTube's hyper-personalised content seems more attractive to younger audiences than SVODs but it is largely drawing this demographic to the web browsers and mobiles.

Major global streamers have YouTuber and creator collaboration written into their 2025 content slates, but will this strategy succeed in drawing younger audiences into their platforms? Watch this space to find out.



Methodology

Digital i measures consumer viewing behaviour in 20 global markets across the United Kingdom, North America, Europe, Latin America, and Asia-Pacific. Using an innovative panel-based data collection method that combines the industry gold-standard approach to panel management and recruitment with new data capture technology, Digital i collects participants' entire viewing history at an account level for measurement anytime, anywhere, and on any device.

All market panels are fully representative of market demographics and privacy compliant. Additional in-depth household demographics are captured directly from panellists and monitored for changes. Data is validated, weighted using proprietary methodology, and metadata is enriched.

At the time of publication, Digital i provides global, granular program-level reporting for Netflix, Amazon Prime Video, Max and Disney+. Live viewing data for Prime Video, Disney+ and Max is not currently collected. Repeat viewing within a single month is not counted. Max data starts from July 2023, all other platforms contain viewing from 2021 to July 2024 in the U.S..

All figures provided in this report are estimations and so may vary from first-party data accounts due to sample error, data processing error or human error.



Metric Definitions

Share of Active Users: The percentage of a platform's subscriber base that has watched a show or that opts for a certain account plan e.g. ad-supported vs ad-free.

Average Daily Minutes: The average number of minutes spent watching content on a platform by the average subscriber account. This metric is based on account-level viewing time , not individual-level viewing time.

Share of Viewing: The total amount of viewing time to a piece of content, content category or demographic as a percentage of total viewing time. This metric is based on account-level viewing time , not individual-level viewing time.

Streams / Share of Streams: A stream is when a consumer clicks start on an individual piece of content. Share of streams refers to the percentage of total streams or click-starts made up by a consumer, show or category, or that takes place on a specific device.

Categories: A list of top categories which a user adds to their own videos. In the case that a video has more than one category added, then an average is taken of all the category labels for the videos on the channel.





Our next report reveals key content completion trends

Sign up to our newsletter or get in touch for more information on global viewer insights.

No one knows viewers like Digital i

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