

State of CTV

July 2025

Your Need to Know around changing consumer behaviors and what it means for advertising



The Need to Know:

Crossing the Streaming Divide

- On Samsung smart TVs 74% of all minutes are streamed
- 2025 is the year when all Americans will watch more streaming than linear
- 71% of all linear minutes are watched by adults ages 45 and older

Sports is not a magic bullet for streaming churn

- Sports fans are more than twice as likely to churn as other app users if streaming apps don't attract them to other content
- Churn continues to be an issue - for every current app user, nearly 9 have churned
- Football is a powerful acquisition tool but does not keep viewers after the season ends

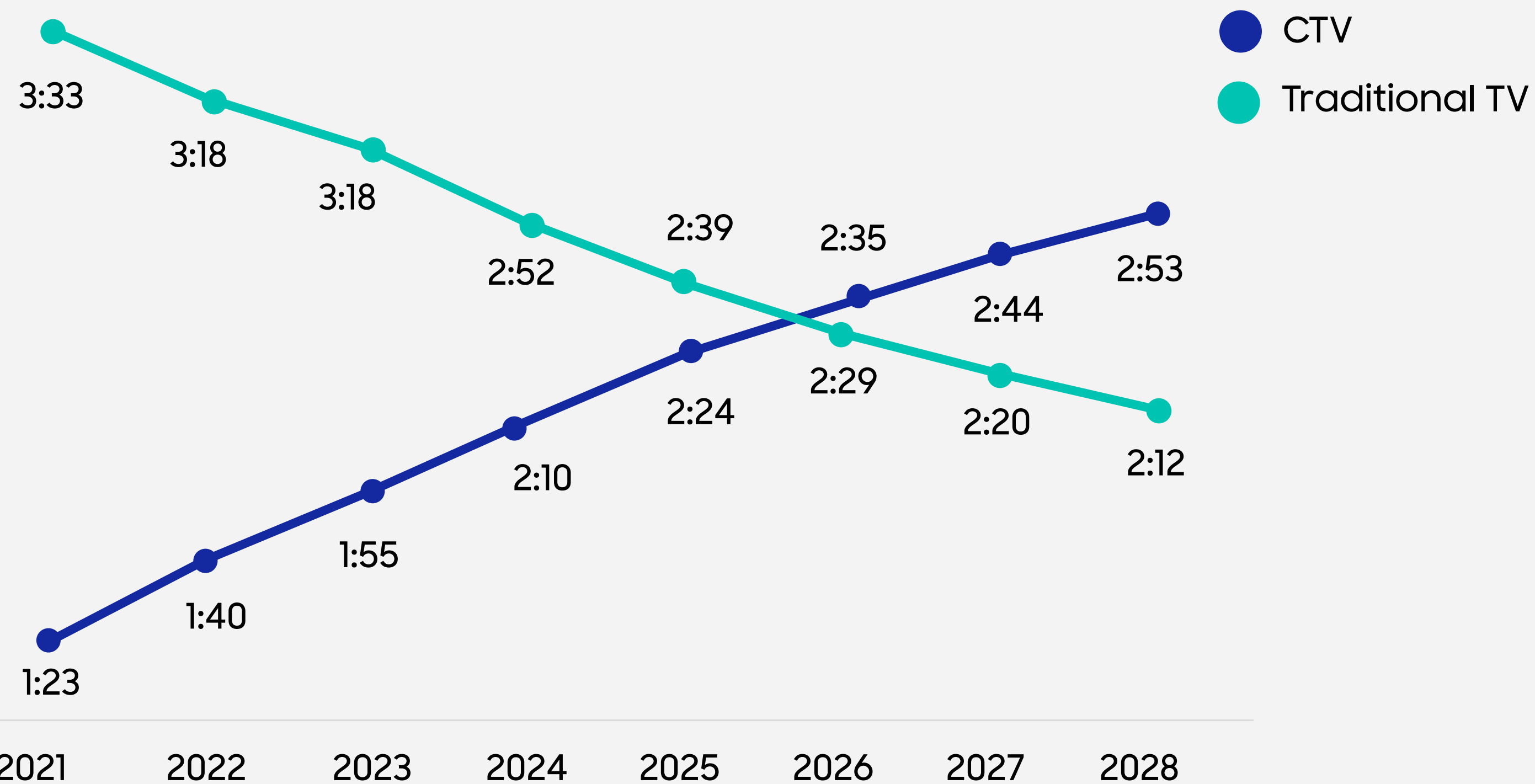
CTV: Conversion TV

- Thanks to its data and AI capabilities, TV is now a performance medium
- Americans expect their TVs to be interactive, responsive, and actionable
- Following consumers behavior, closing the purchase loop can be on or off-device

Crossing the Streaming Divide

Across all TV homes in the U.S., more time will be spent with streaming than with linear in 2025

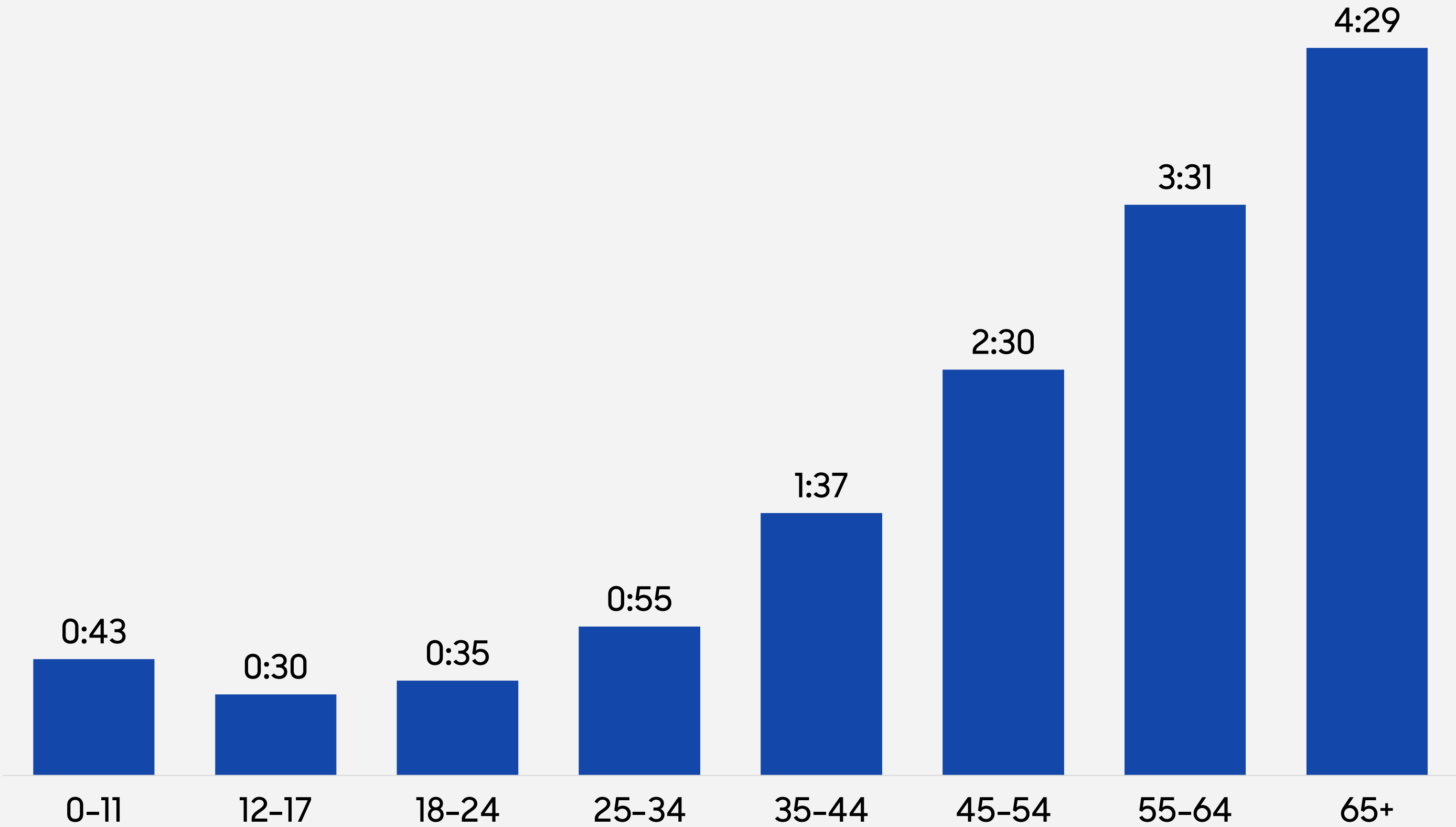
Average hrs:mins spent per day with streaming vs. traditional TV by U.S. adults, 2020–2028



In 2025 Americans will spend more time with streaming than with traditional TV

7 of every 10 linear minutes are watched by adults 45 or older

Time Spent with Linear TV (H:MM)



Proportion of total TV time by age group

Age group	% of Linear time	% of population
65+	30%	18%
55-64	24%	12%
45-54	17%	12%
35-44	11%	13%
25-34	6%	14%
18-24	4%	9%
12-17	3%	8%
0-11	5%	14%

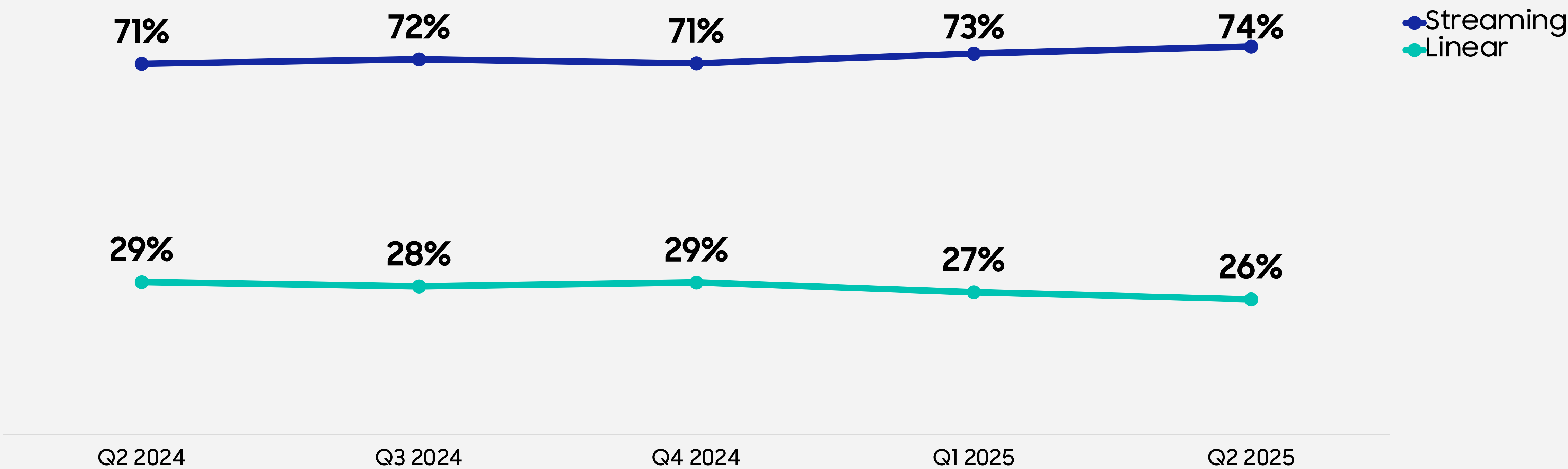
71% of time/
42% of population

29% of time/
58% of population

Source: [U.S. Average Time Spent per Day with TV, by Age Forecasts: EMARKETER Estimates and Historical Data](#)

On Samsung smart TVs, streaming has led linear for years. In Q2, 3 out of every 4 minutes were spent with streaming content

Share of TV time trend

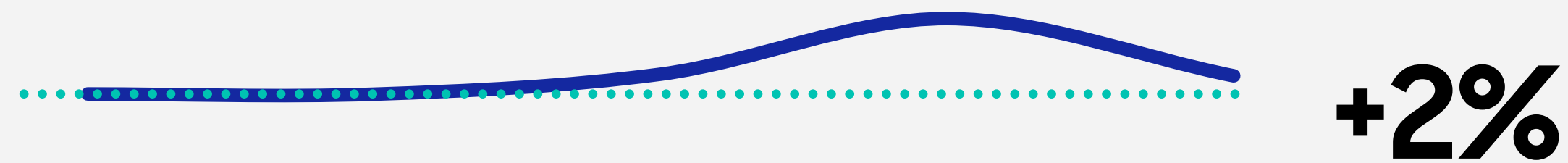


Source: Samsung Proprietary ACR - active TVs in the quarter. Streaming is viewership in Smart Hub TV Apps including Samsung TV Plus; Linear is viewership of matched Linear ACR Content. Total TV time refers to time spent with either Streaming or Linear content.

Time spent per TV is generally flat year-over-year stalled by notable drop in linear

Time spent/TV/day trend

Streaming time



Linear time



Q2 2024 Q3 2024 Q4 2024 Q1 2025 Q2 2025

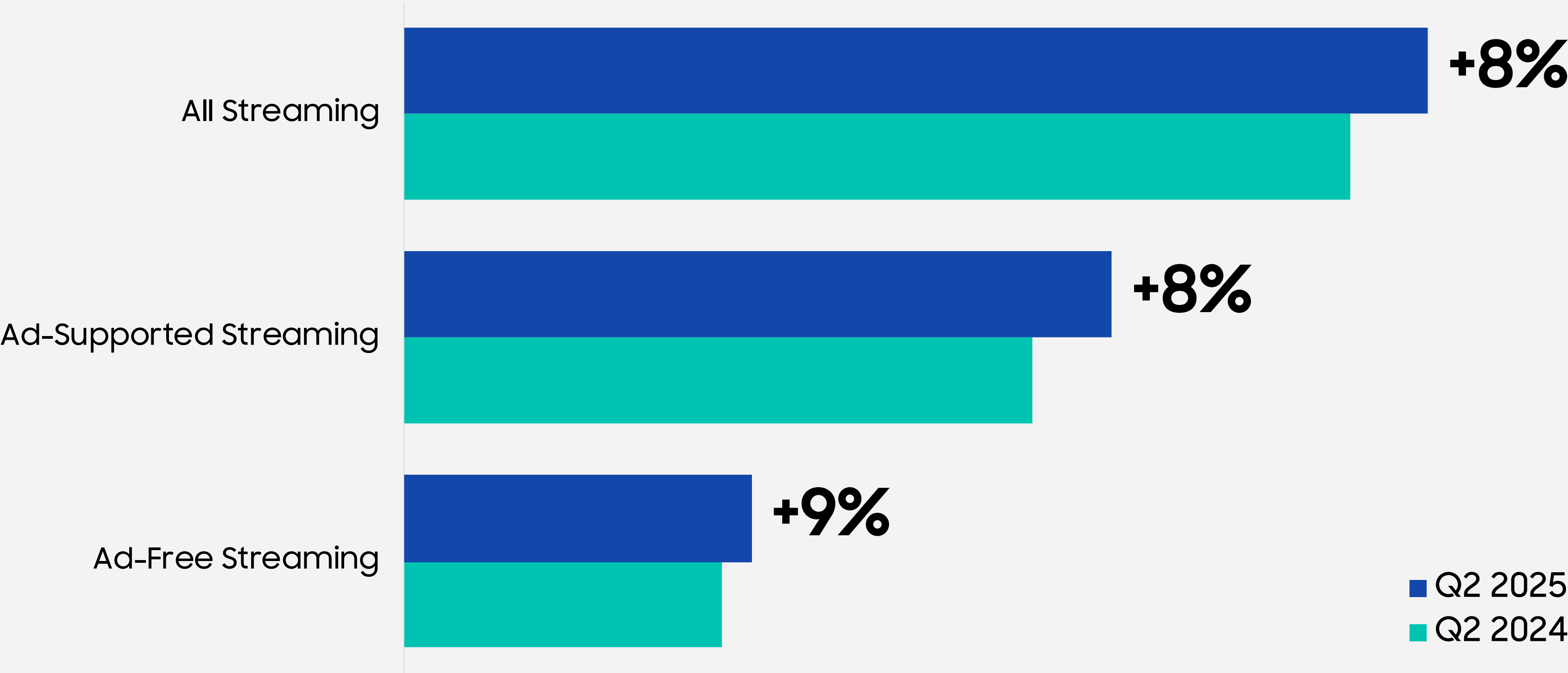
-2%

Total TV viewing
time per TV YOY

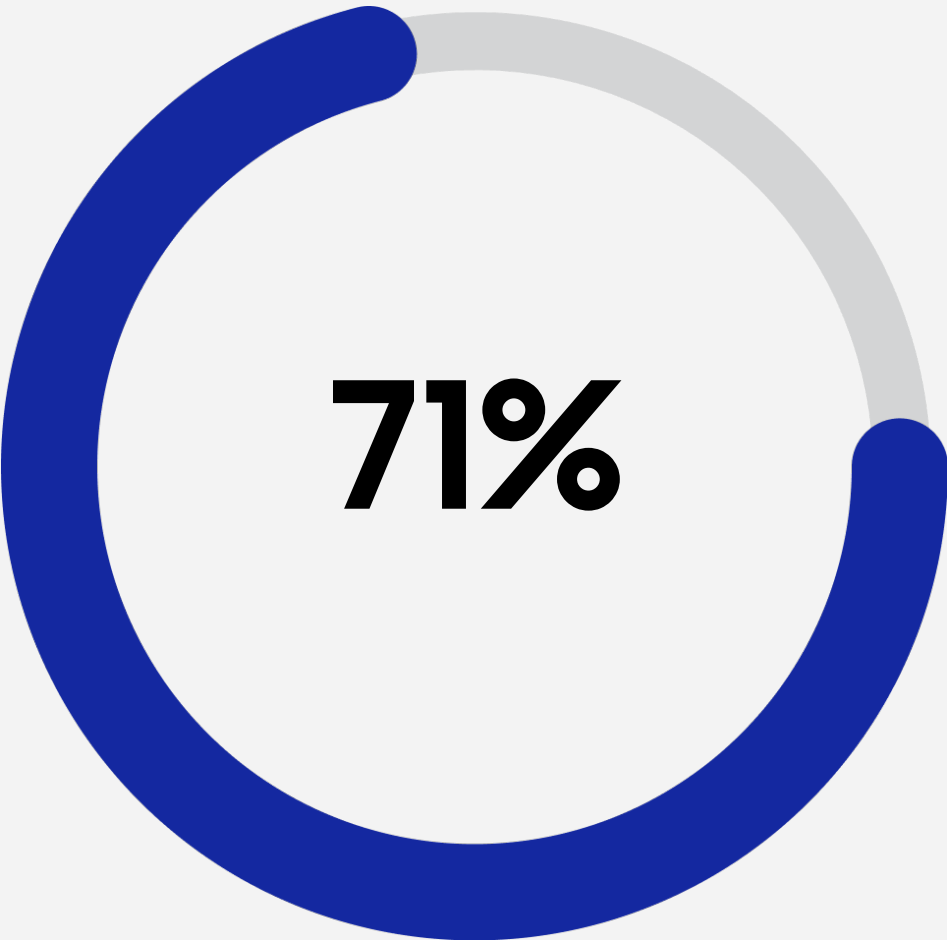
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The shift to streaming is powered by ad-supported options

Streaming time by app type



According to Antenna, ad-supported subscriptions account for 71% of all of net additions



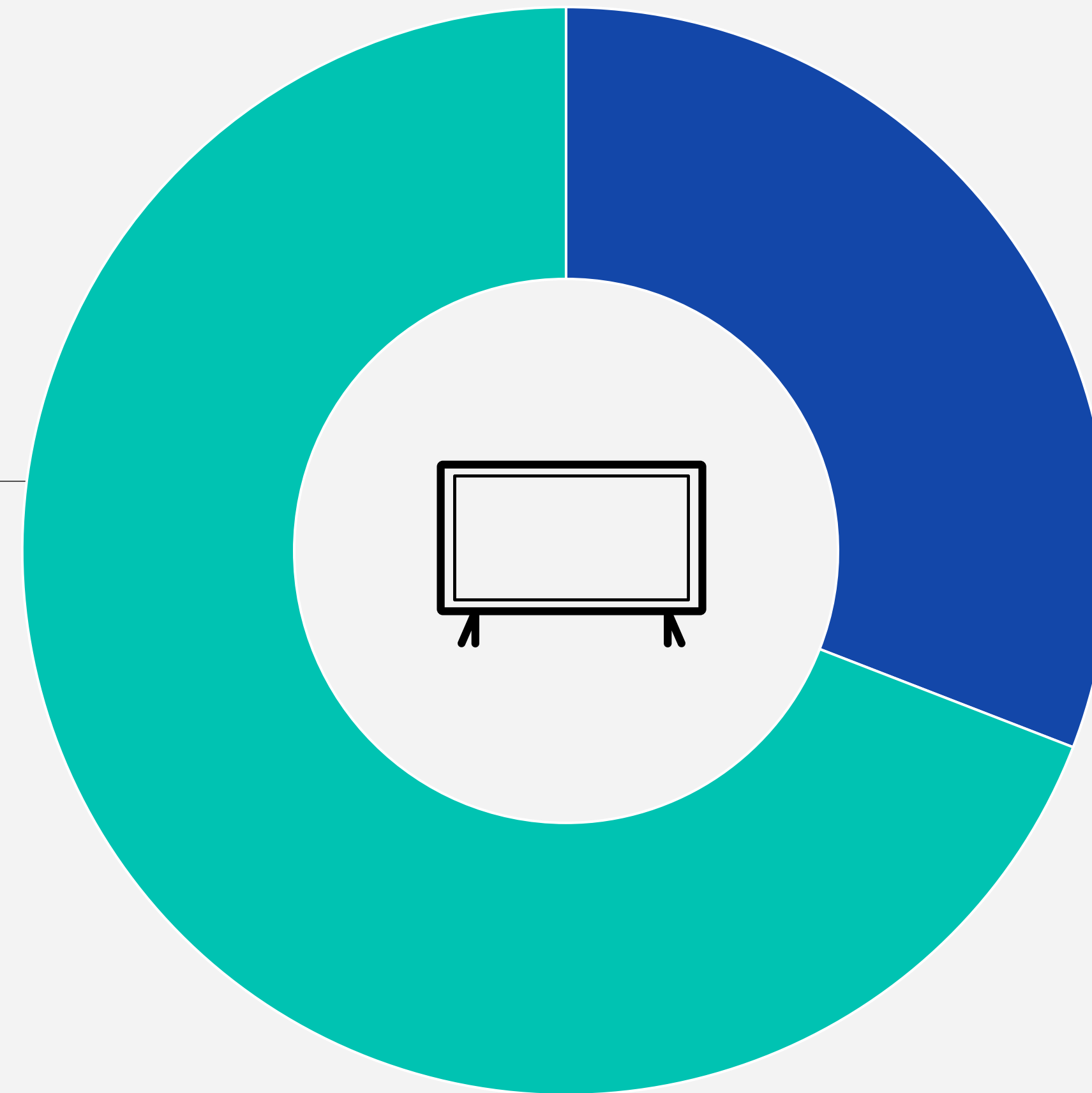
Source: Samsung Proprietary ACR - Includes Active TVs in the quarter. Streaming is viewership in Smart Hub (including Samsung TV Plus) with a minimum of 1 minute of consecutive app viewership. AVOD includes all ad-supported streaming minutes and SVOD includes all ad-free streaming minutes inclusive of hybrid apps that offer both ad-supported and ad-free tiers.
Antenna Q2 2025 State of Subscriptions

More than two-thirds of streaming time is ad-supported

SAMSUNG Ads

Share of streaming time

69%
Ad-Supported



31%
Ad-Free

The Need to Know:



- Across all TV homes in the U.S., more time will be spent with streaming than with linear in 2025
- Consumers choose ads in streaming and ad-supported streaming time continues to grow
- Not only is linear viewing declining, it is a niche behavior, reaching small segments of American TV viewers

Sports is not a
magic bullet to churn

Churn continues to be an issue for streaming apps

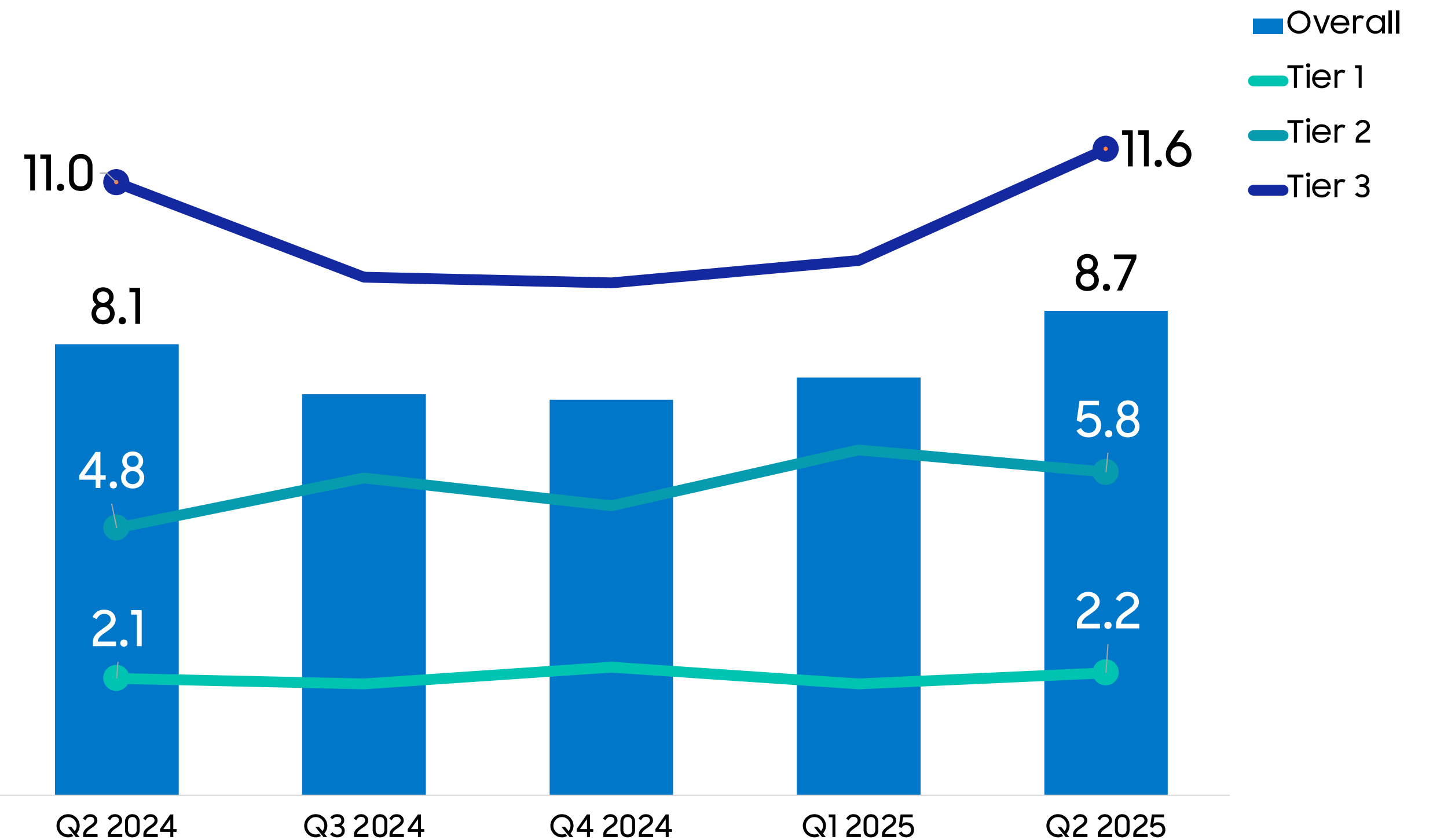
For every active user, another 8 users have churned out

The churn ratio

Lapsed users
from the last 12 months



Active users
for the current month



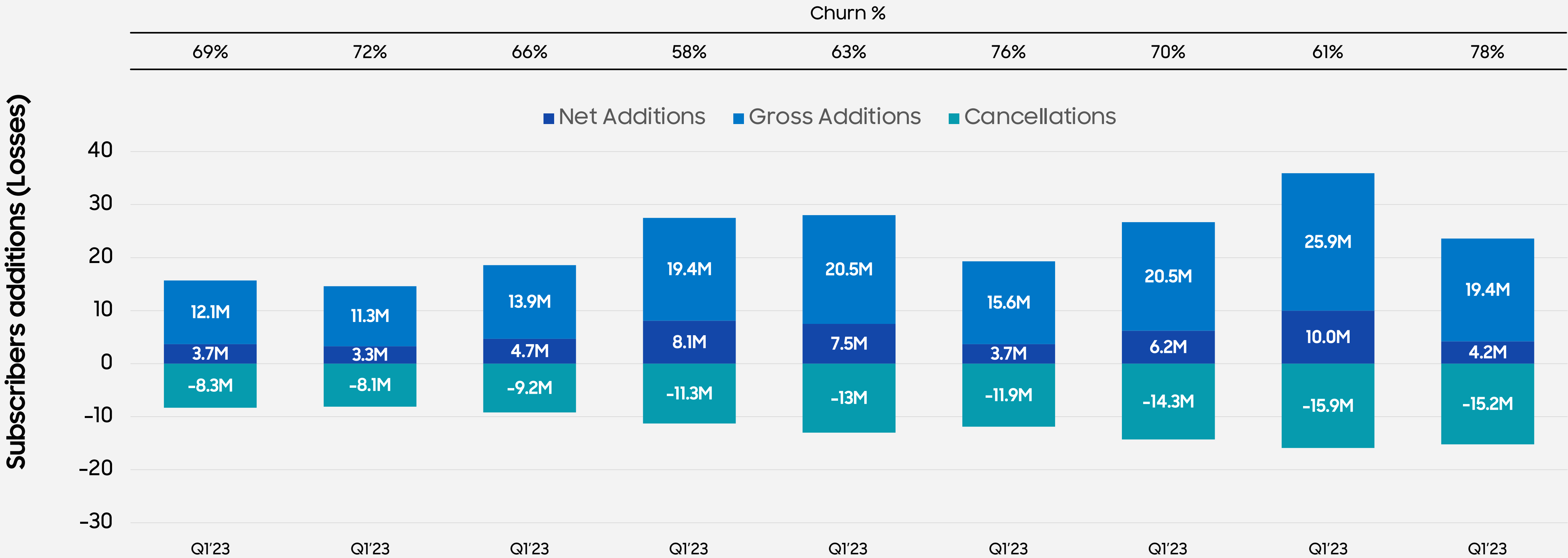
Source: Samsung Proprietary ACR - active TVs in the quarter.

The Churn Ratio is a summary metric that compares a streaming app's past 12-month audience to its current month audience.

Ad tiers don't solve churn

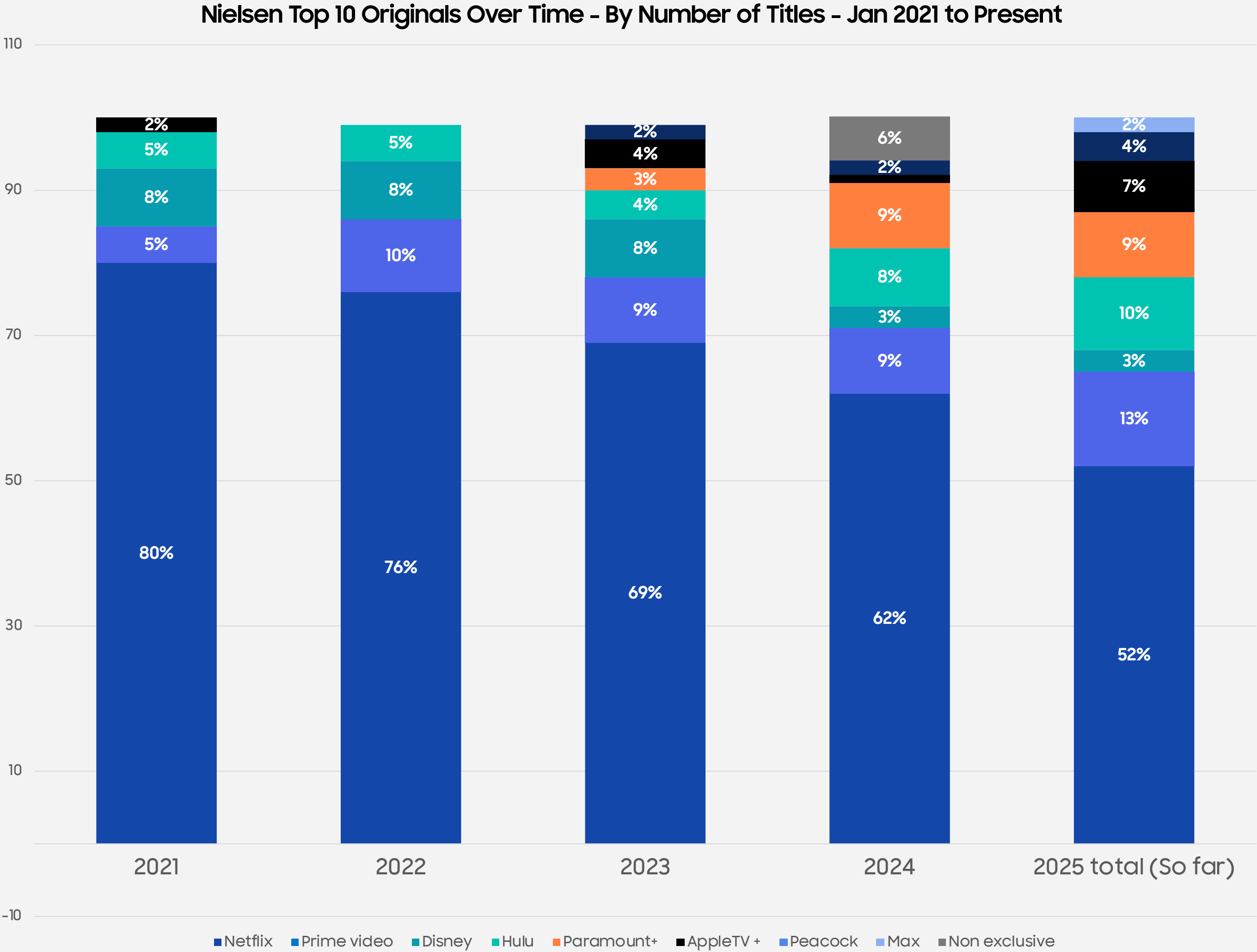
The rate of churn has remained consistent over the past 9 quarters

According to Antenna's data, cancellations negate an average of 68% of new subscriptions



Source: Antenna
U.S. only | Excludes Free Tiers, MVPD + Telco Distribution, and select Bundles | Premium SVOD services with an ad plan are included: Discovery+, Disney, Hulu, Max, Netflix, Paramount+ and Peacock.

More originals
across more
services
exacerbates
churn

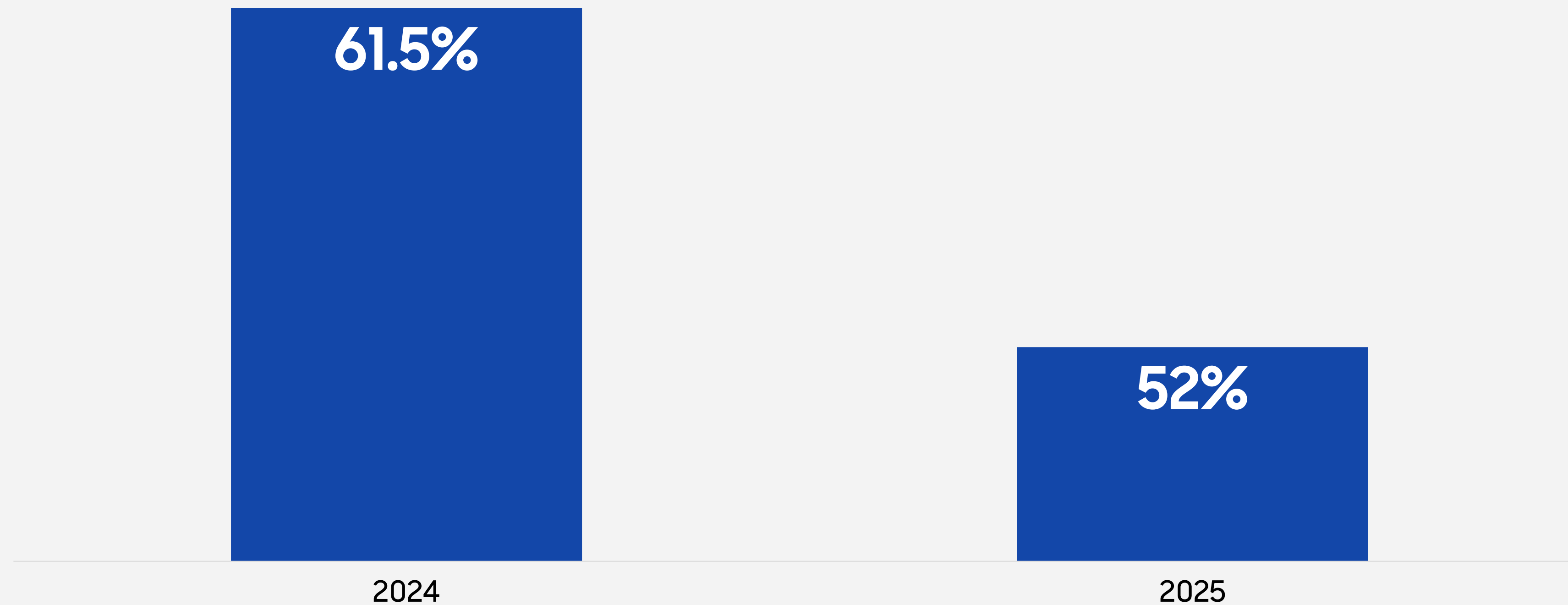


Users are cutting back on usage of the 7 big SVODs

A reaction to increased prices and the fact that each offers an abundance of content

% using 3 or more of the "Big 7" SVODs

"Big 7": Netflix, Amazon Prime, Disney+, Hulu, Max, Peacock, Paramount+



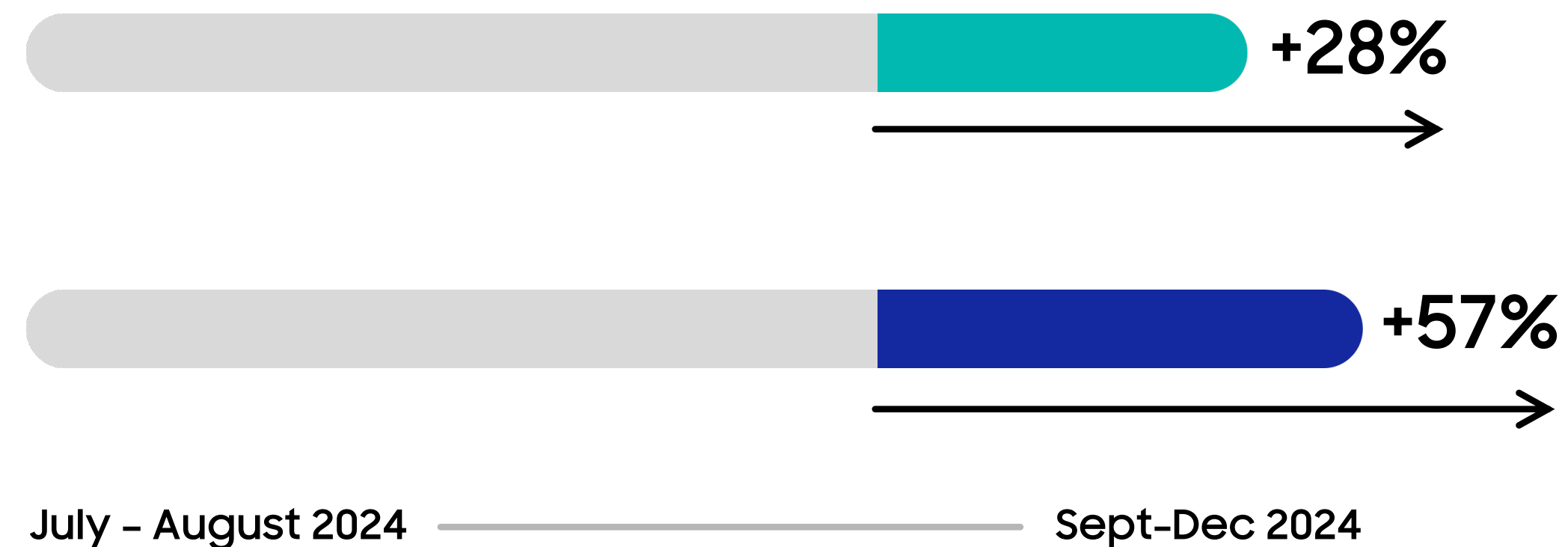
Sports do not solve streamers' churn problems

SAMSUNG Ads

Football-Influenced Audience Behavior

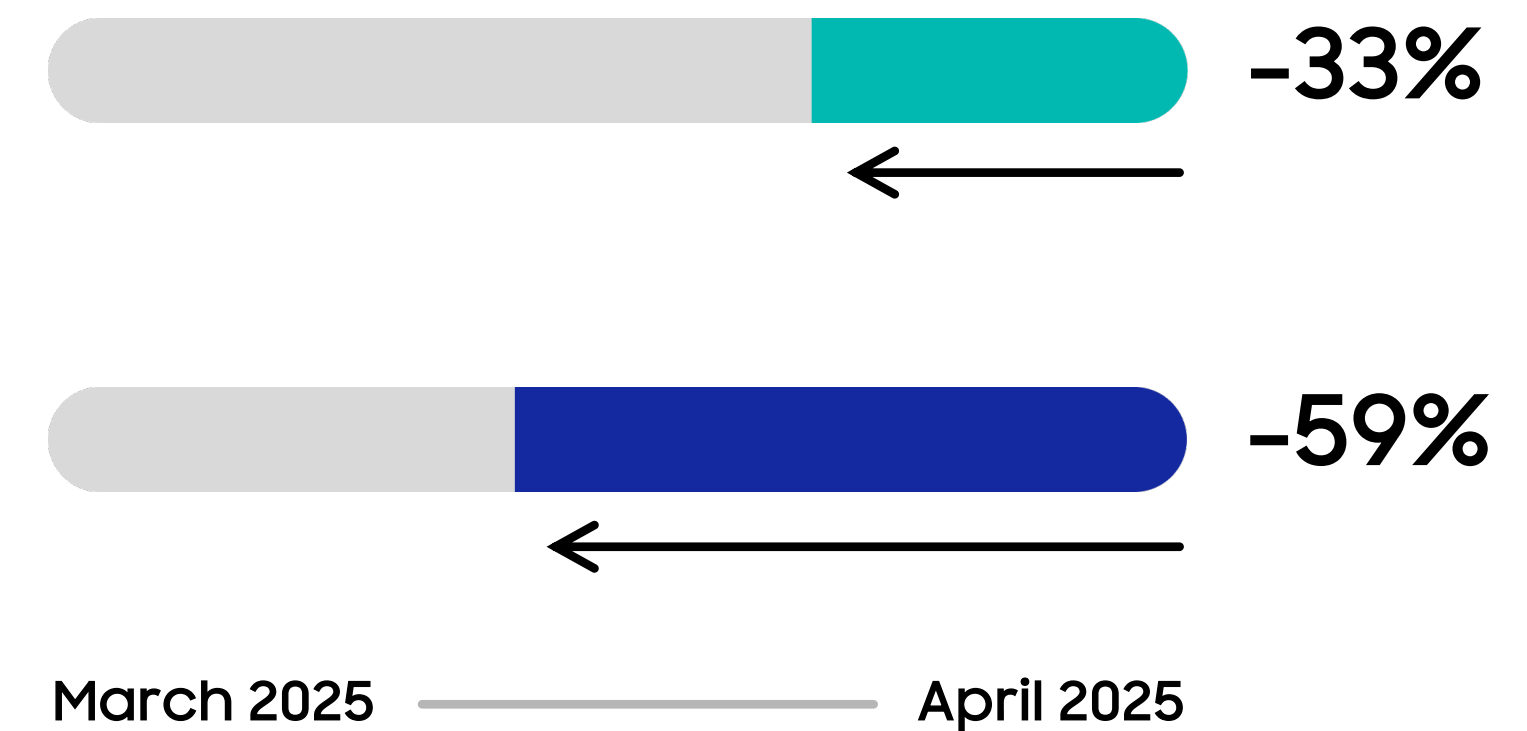
■ Viewers

■ Hours per Viewer per Month



■ Viewers

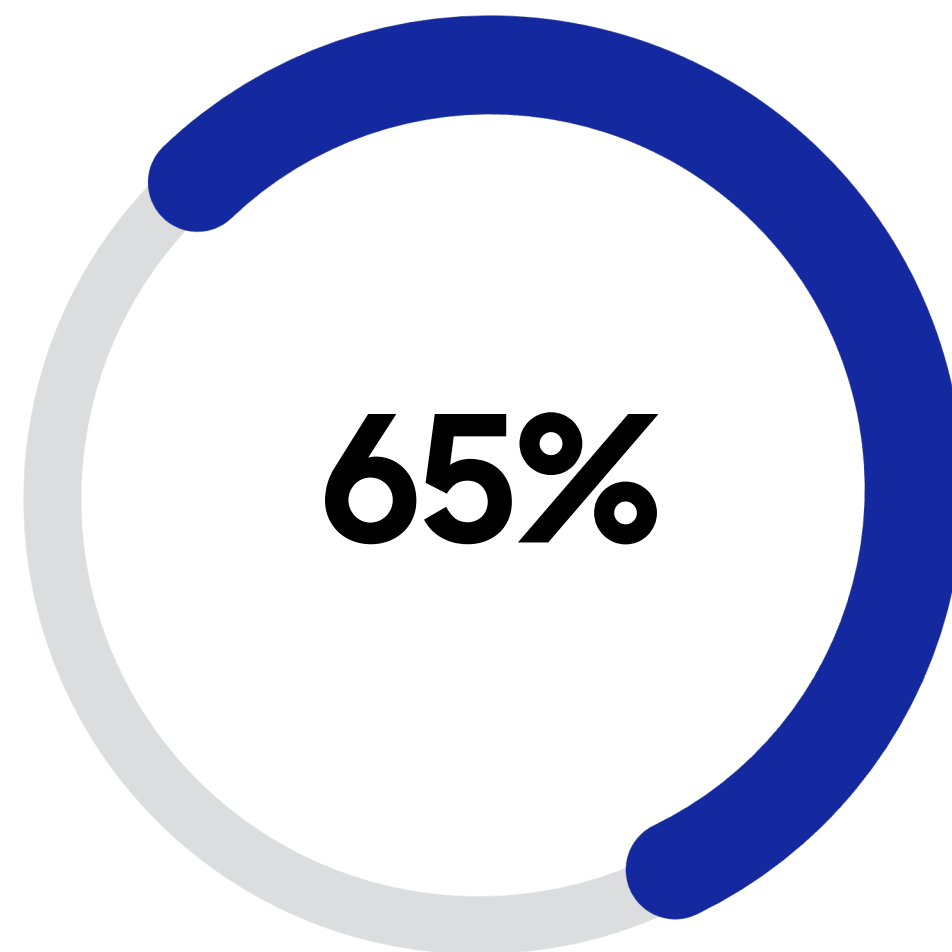
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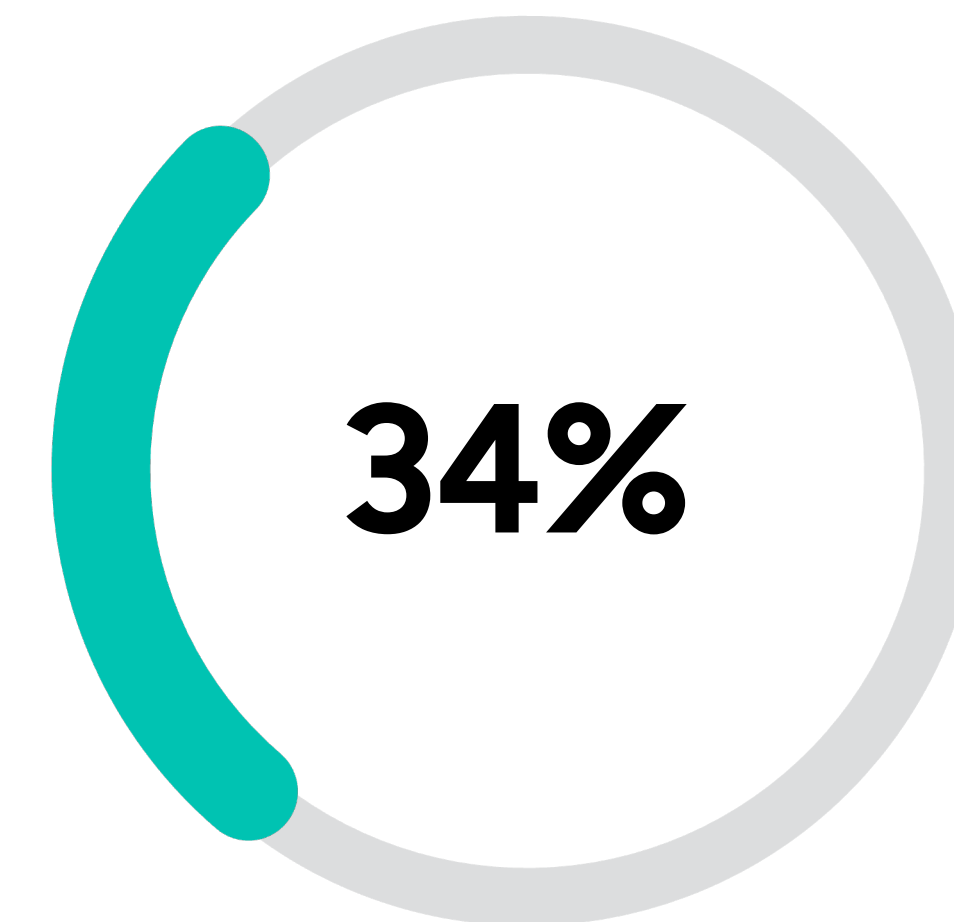
Among users who joined during the NFL season, churn was 2x compared to those who were active users before the NFL season

Audience churn

New Subscribers (During NFL Season) Existing



Subscribers (Pre-NFL Season)



The Need to Know:



- Reaching streaming audiences consistently and predictably remains a problem as streaming app churn is as high as ever
- As services invest in more originals, audiences continue to splinter
- Sports can attract large audiences but without converting viewers to other content, sports audiences are twice as likely to churn as other app users

Conversion TV: TV's future is lower funnel

Americans have a new framework for how they think about their TVs

TV should be like other screens they use –
interactive, responsive and actionable

Consumers are expanding how they use TVs beyond traditional viewing

Younger consumers are leading the way.

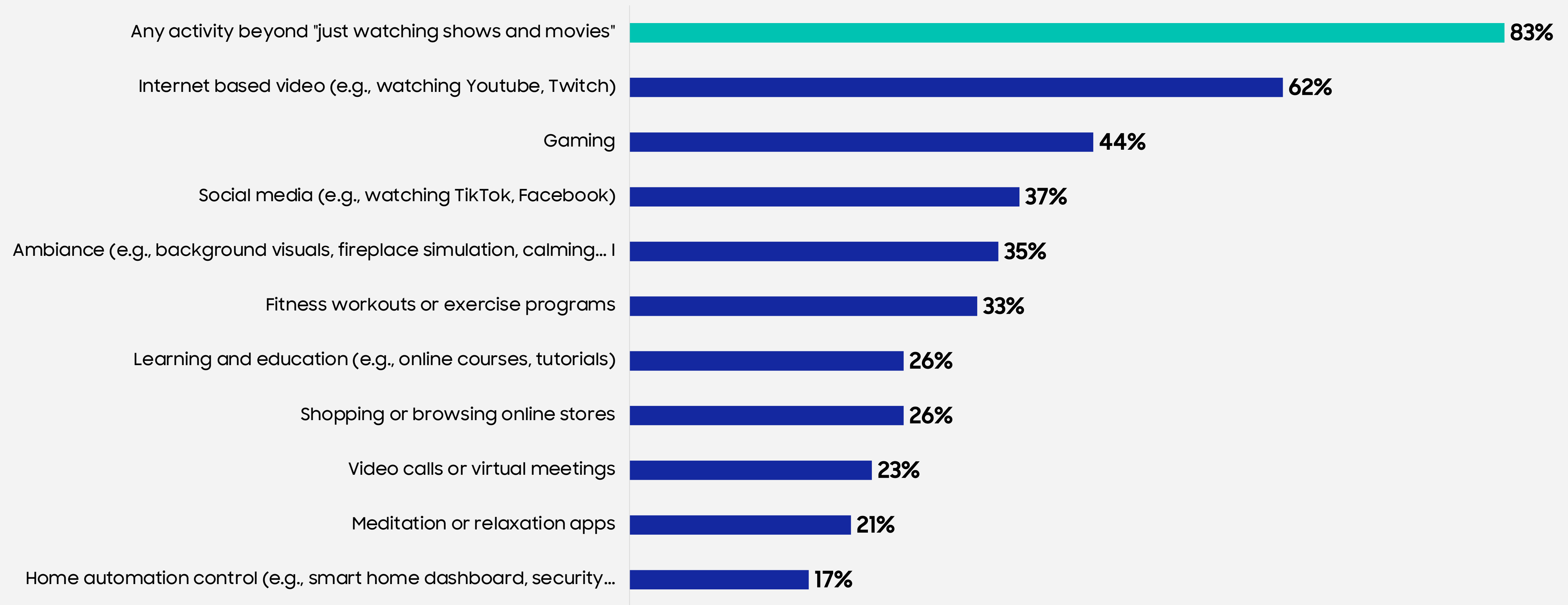
TVs are no longer just for “watching TV”

I use my TV for more than just watching shows and movies



New use cases create new data signals that are predictive of a multitude of behaviors

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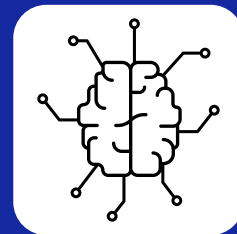
From broadcast to buy now

How CTV is becoming the next performance powerhouse



Target

Who is the audience you want to reach



Optimize

Shift the focus beyond :30s and :60s to interactive ways to engage the viewer



Measure

Streamline the outcome and measure tangible results

Targeting and optimization powered by machine learning

New data signals help to build precise audience segments and optimize ad delivery

Right person

Audience intelligence

Identifies users with a high propensity to convert

Right inventory

Inventory optimization

Automatically reallocates impressions to the highest performing inventory

Right creative

Creative optimization

Leverages multiple creative assets to serve the most relevant ad creatives

Right time

Bidding intelligence

Results in real-time bid optimization to maximize your KPI

Measuring success

AppsFlyer measurement shows greater cost-efficiency in driving app installs and in-app purchases than non-targeted audiences when run across Samsung inventory

90%

Reduction in CPI

Exceeding client's
benchmark of \$6-\$10

10x

**Improvement in
Install Rate**

20%

ROAS

surpassing clients
benchmark of 5.5%

The Need to Know:



- Americans are using their TVs to do much more than "just watch"
- New use cases create new data signals that are predictive of a multitude of behaviors
- CTV is becoming the next performance powerhouse through precision targeting, machine learning-powered optimization, and MMP measurement

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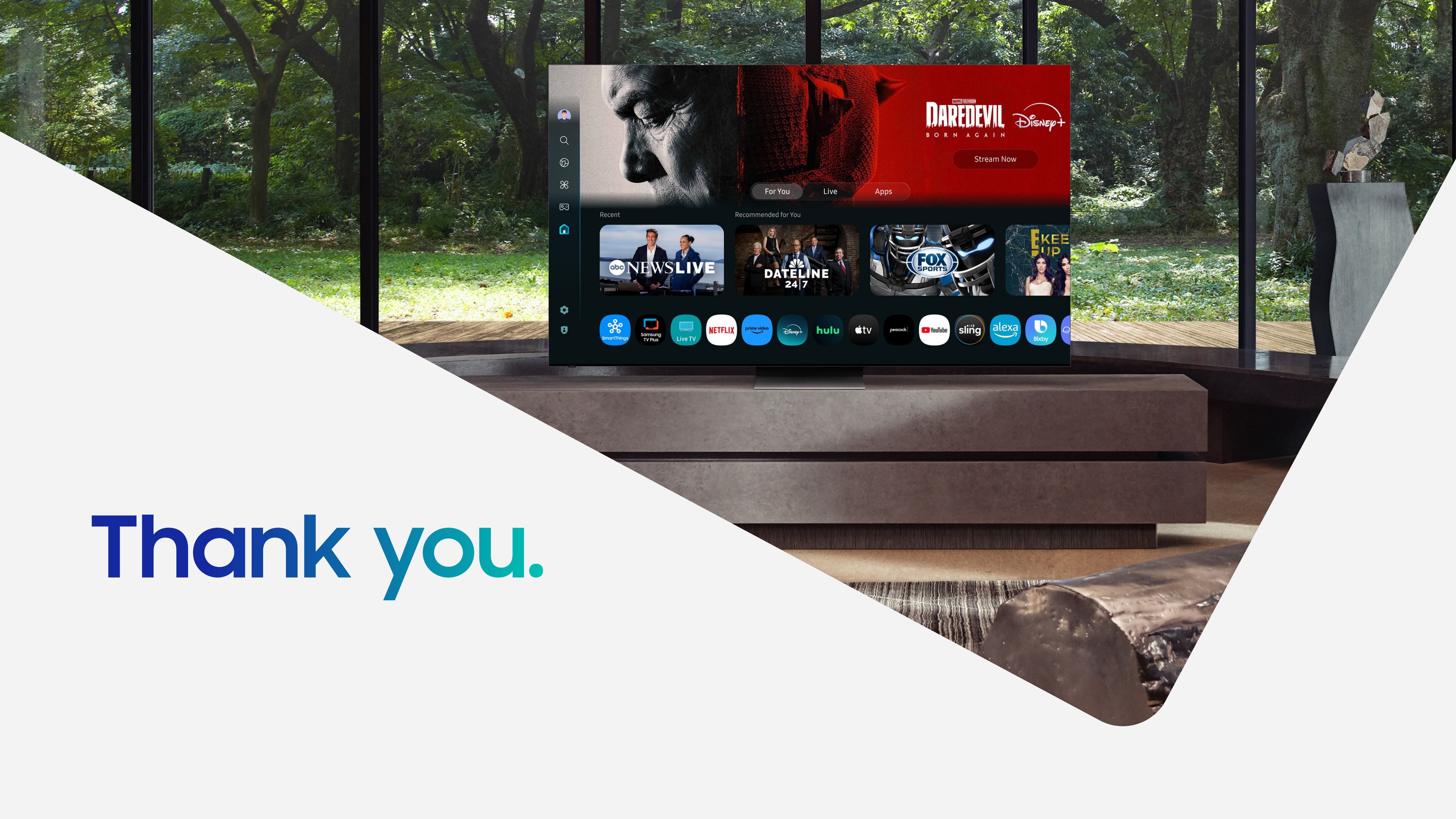
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Thank you.