



Video Streaming Industry Report 2023

Services see boosts in engagement and QoE amid Smart TV growth

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Increased engagement and quality mark a great year for streaming

“After two years of drops in user engagement per service following the pandemic streaming boom, daily playtime per user increased globally in 2023, especially for VoD, consolidating the trend reversal observed in the first half of the year. The average time a service user spent streaming content had decreased as platform options multiplied and economic uncertainty impacted household budgets. The positive shift in 2023 suggests consumers are focusing on fewer platforms or have increased their overall content consumption.

On the Quality of Experience front, 2023 was a year of significant improvements across key metrics, both globally and regionally, signaling that there is still room for optimization. Meanwhile, big-screen devices expanded their dominance in total playtime, driven by Smart TV growth. But there was more. Join us as we explore the trends shaping the world of streaming.”

Ferran G. Vilaró
CEO & Co-Founder of NPAW

Key Takeaways

Want to share the report's insights on LinkedIn? Get the images [here](#)

VoD daily playtime per user surged after a two-year drop

Avg. consumption per service user grew globally by 12%, suggesting either higher consumption or consolidation.

Episodes remained dominant for VoD, with movies slightly up

VoD consumers globally preferred episodic content, with a slight global increase in movie playtime.

VoD quality saw improvements, but bitrates stayed stable

All global KPIs improved except for bitrate, suggesting services have reached their target video quality.

Daily playtime per user for Linear TV made a comeback

Global user engagement with Linear TV content increased by 4%, a positive shift after last year's steep decline.

Linear bitrates continued to improve with the rest of quality KPIs

Global bitrate improved for the second year in a row, suggesting there is still room for further improvement.

Large screens continued to dominate VoD and Linear TV

Smart TV growth boosted the share of playtime of large screens. STBs were a close second for linear viewing.

Annual Report 2023

This report examines the state of the video streaming industry on a global and regional scale, comparing 2023 engagement and quality data with 2022 numbers.

The data analyzed in this report were extracted from the NPAW Suite from January to December 2023 and compared to data from 2022. They represent real-time data from over 190 global NPAW clients, including leading OTT providers, broadcasters, and telecom operators.

As our data library and client base are continuously evolving, the data presented in this report may slightly differ from previous iterations and third-party industry data sources.

VoD

+12%

Avg. Daily Playtime per User vs 2022

67%

Of total playtime captured by episodic content

Linear TV

+4%

Avg. Daily Playtime per User vs 2022

+9%

In the global Avg. Bitrate

VoD — Engagement

Daily playtime per user surged after a two-year drop

After dipping due to service competition, the increase in the average time a user of a service spends watching content per day signaled higher consumption or consolidation.

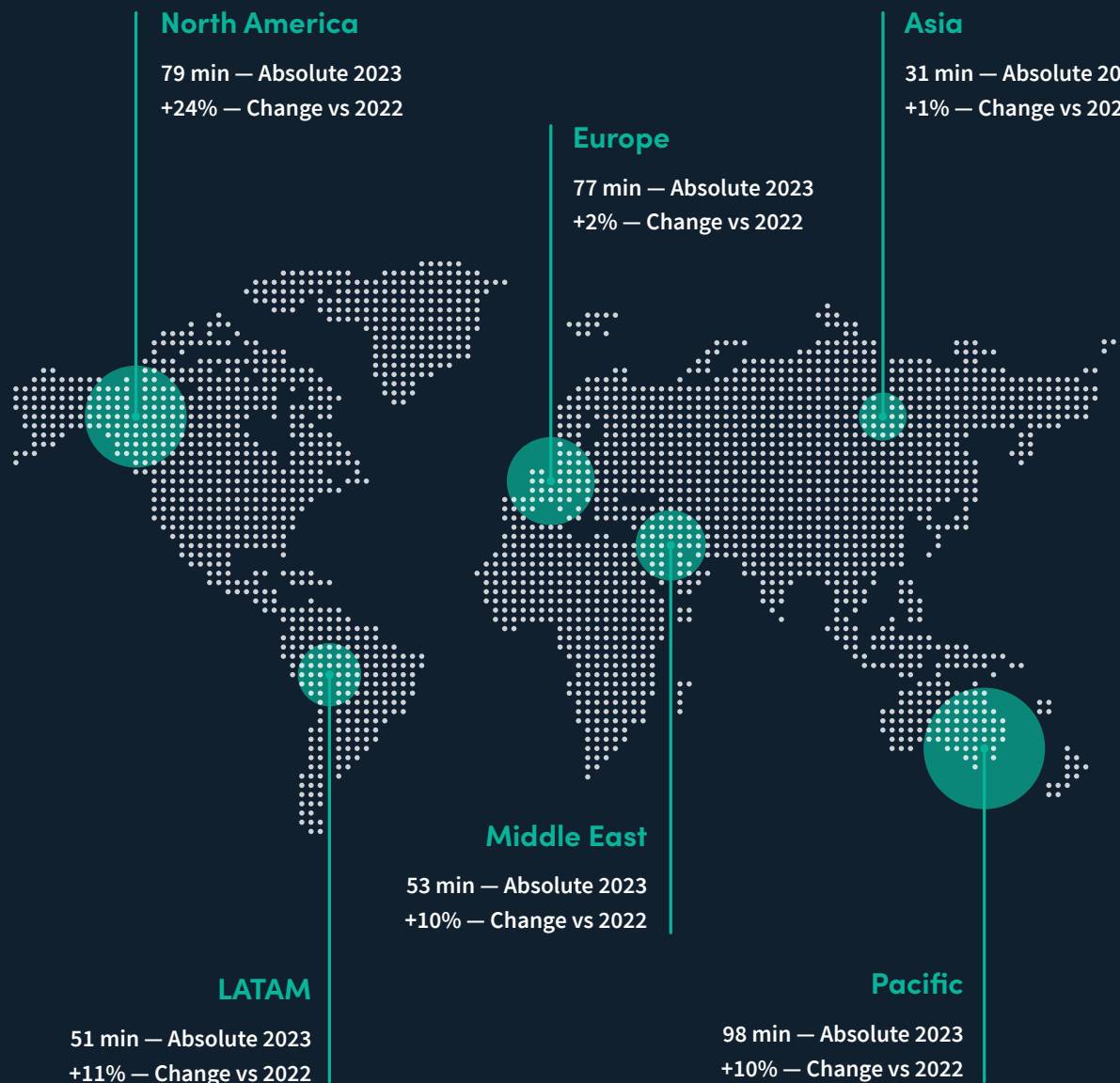
Global 2023

52.5 min

Global 2023 vs. 2022

+12%

Avg. Daily Playtime per User

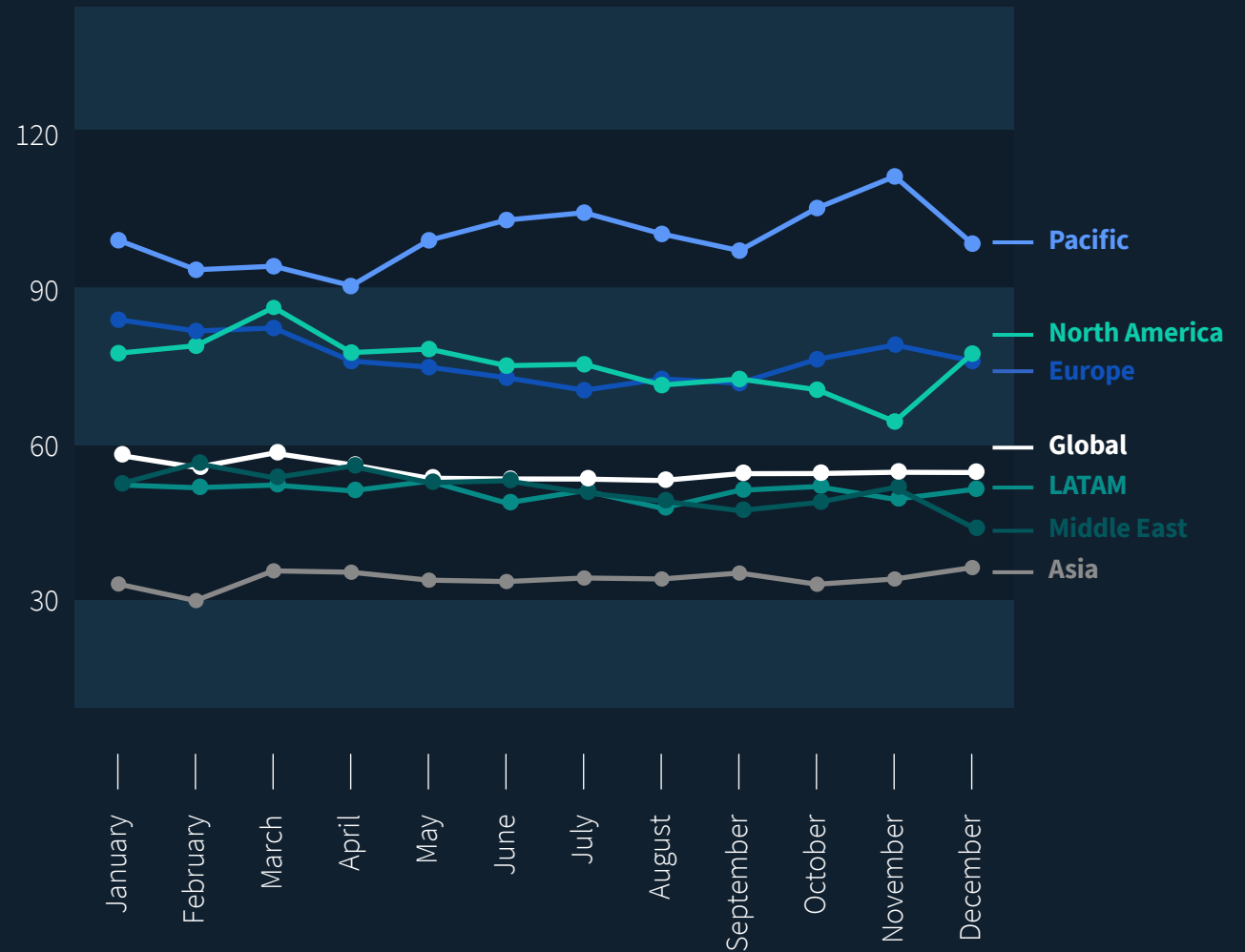


VoD — Engagement

The monthly evolution of viewer engagement

Global daily playtime per user remained stable in 2023, with the highest consumption regions—Pacific, North America, and Europe—showing more variation. In these areas, usage peaked in colder months, except for November in the Pacific and North America.

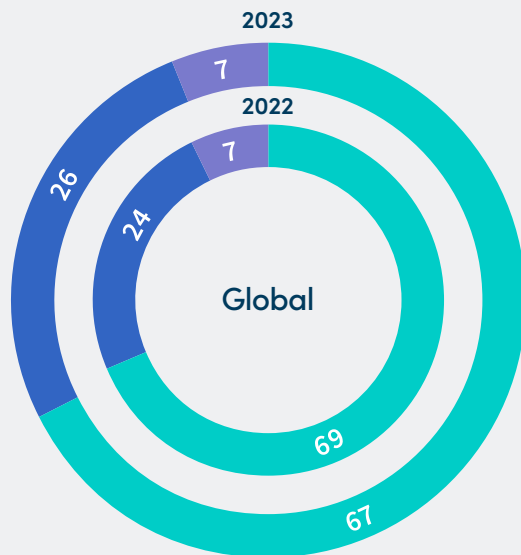
Avg Daily Playtime per User (min)



VoD — Content Type

Episodes remained dominant, with movies slightly up

One more year, VoD consumers globally preferred episodic content, with a slight increase in movie playtime driven by Europe, the Pacific, and LATAM.

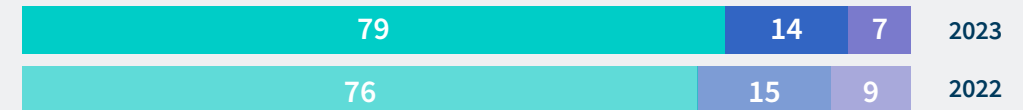


Share of Total Playtime (%)

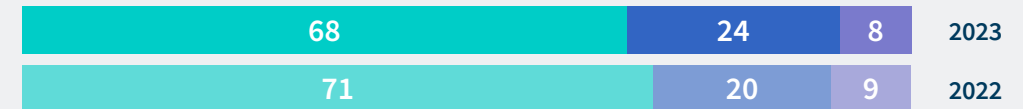
● Short (<20 min)
 ● Episode (20-90 min)
 ● Movie (>90 min)

Share by Region (%)

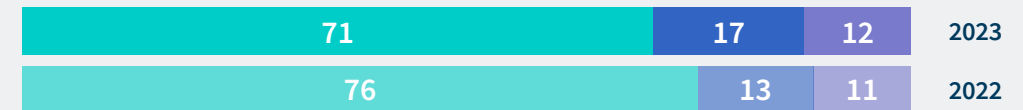
Asia



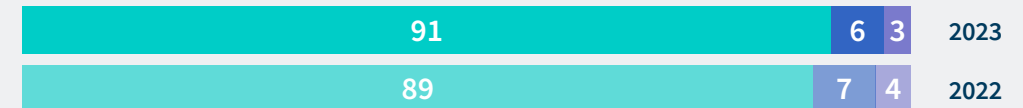
Europe



Pacific



Middle East

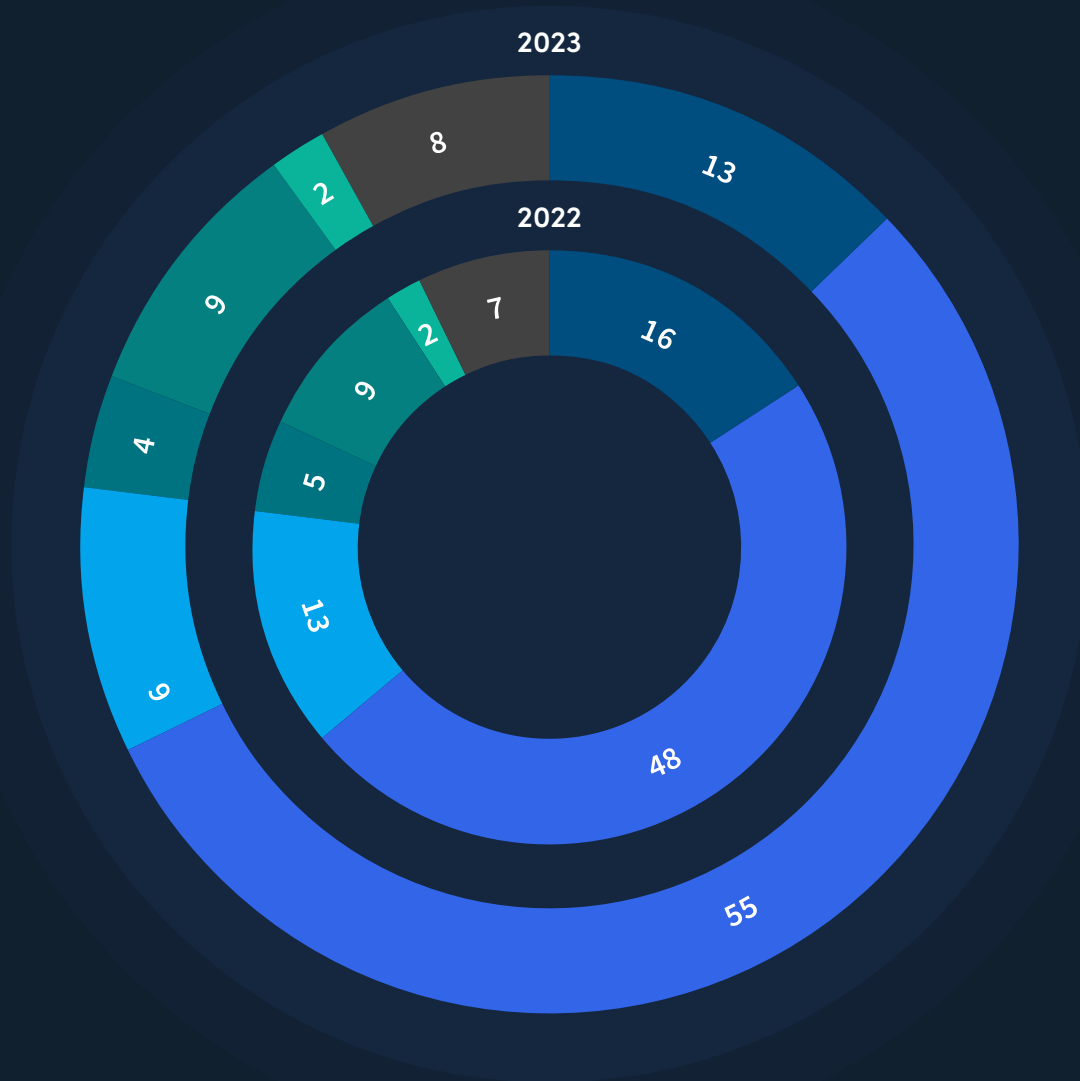


LATAM



North America



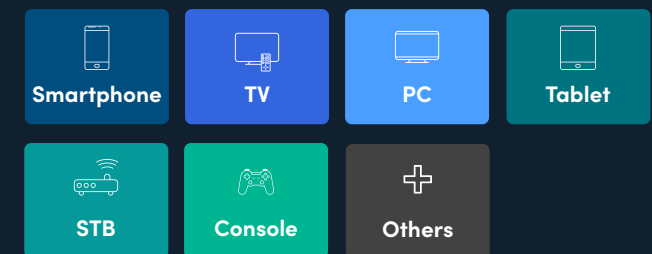


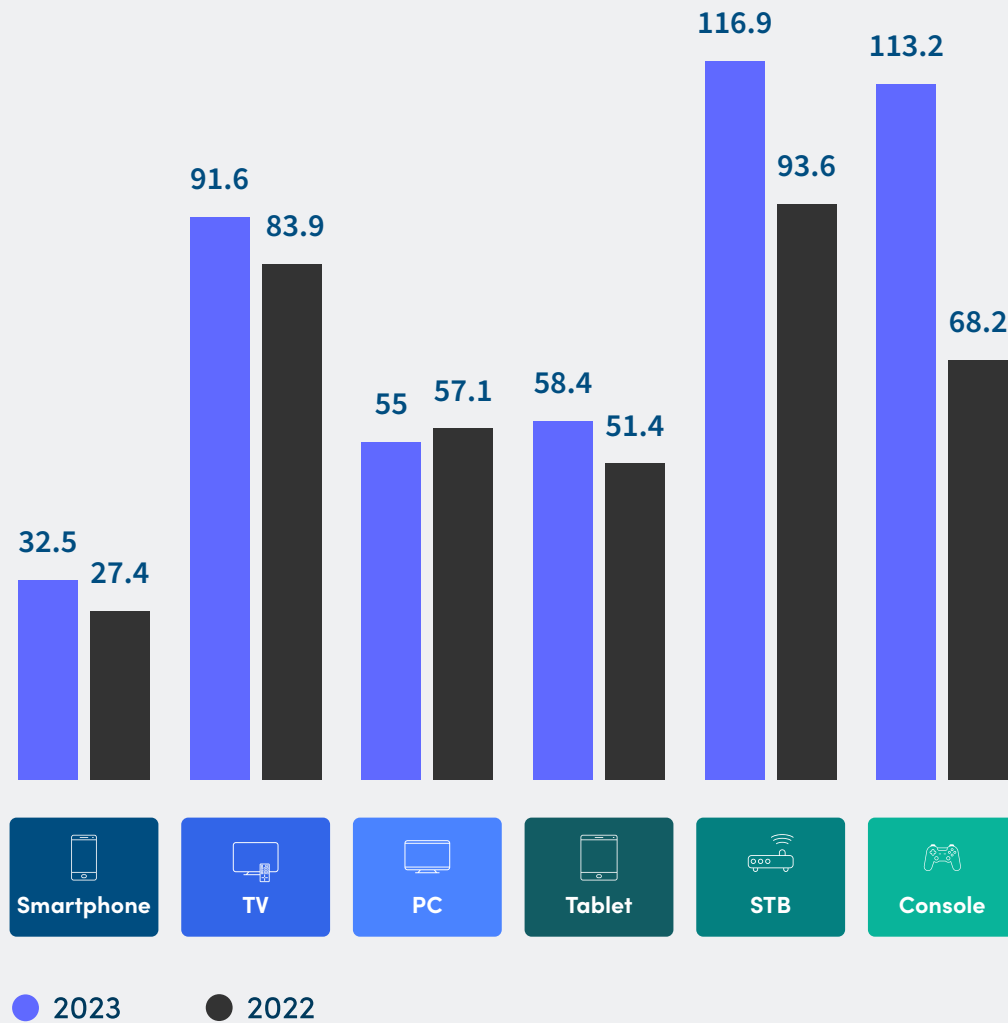
VoD – Device Share

Smart TV growth made large screens even bigger

Streaming fans overwhelmingly prefer big-screen experiences. As cord-cutting increased and Smart TVs became more ubiquitous, connected TVs are capturing an increasingly larger slice of the total playtime. They did so mostly at the expense of PCs and Smartphones, with both device types losing share to TVs.

Share of Total Playtime (%)





VoD – Device Engagement

Larger formats also kept users glued to their screens for longer

While all devices increased their daily playtime per user except for PCs, the biggest increases were seen in larger-screen devices, particularly consoles. These, along with STBs, also captured the highest minutes per user and day for yet another year. While smartphones saw the third biggest increase in engagement, they remained the go-to option for casual streaming.

▮ Avg. Daily Playtime per User (min)

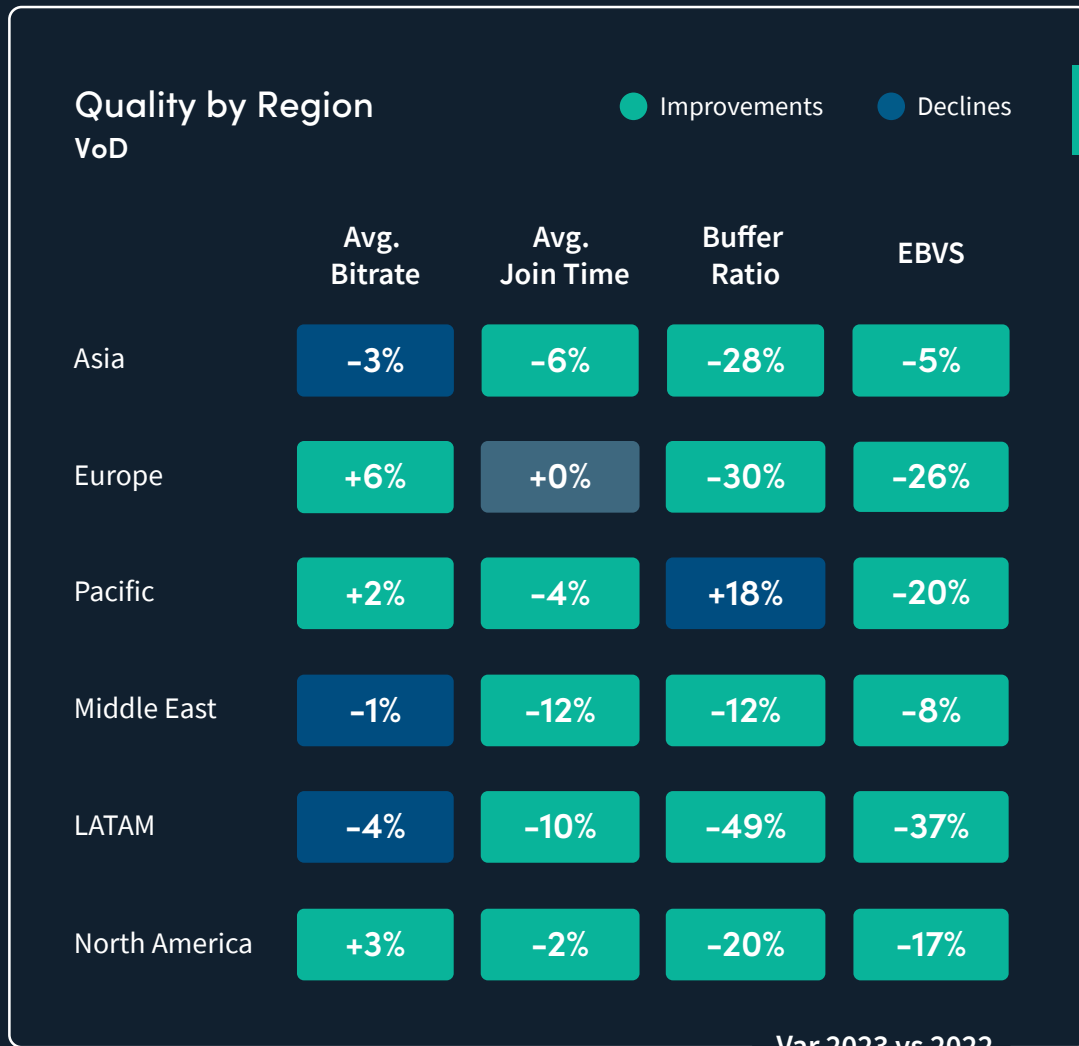
VoD — Global Quality

VoD Quality of Experience saw significant boosts

Following a 2022 with no year-over-year improvements in the global Quality of Experience for VoD, 2023 saw significant boosts. All global KPIs improved except for the Avg. Bitrate, suggesting services have reached their target video quality and are focusing on providing a smoother experience.

Global Avg. (2023 vs 2022)

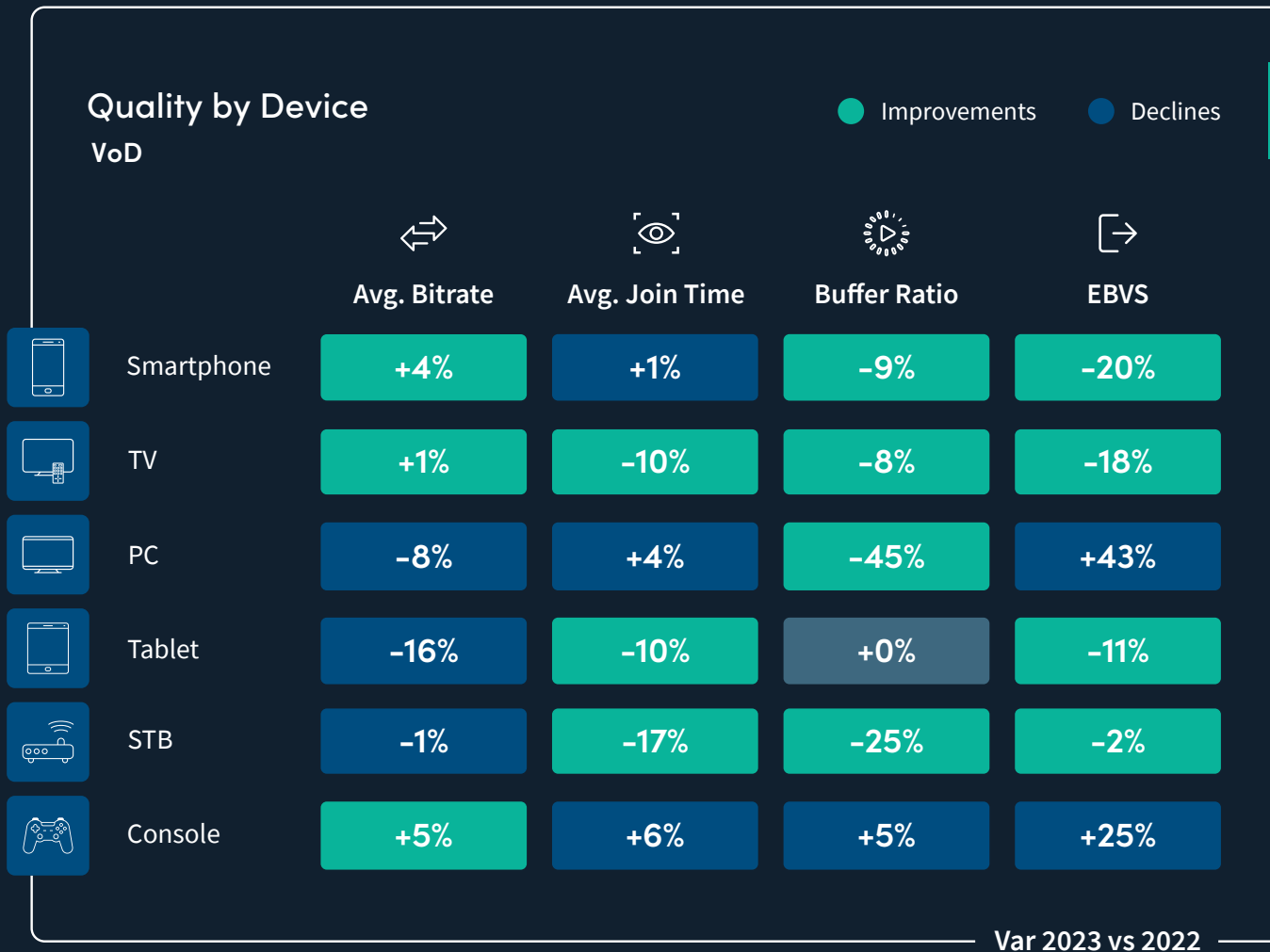




VoD – Quality by Region

All regions improved most of their key quality metrics

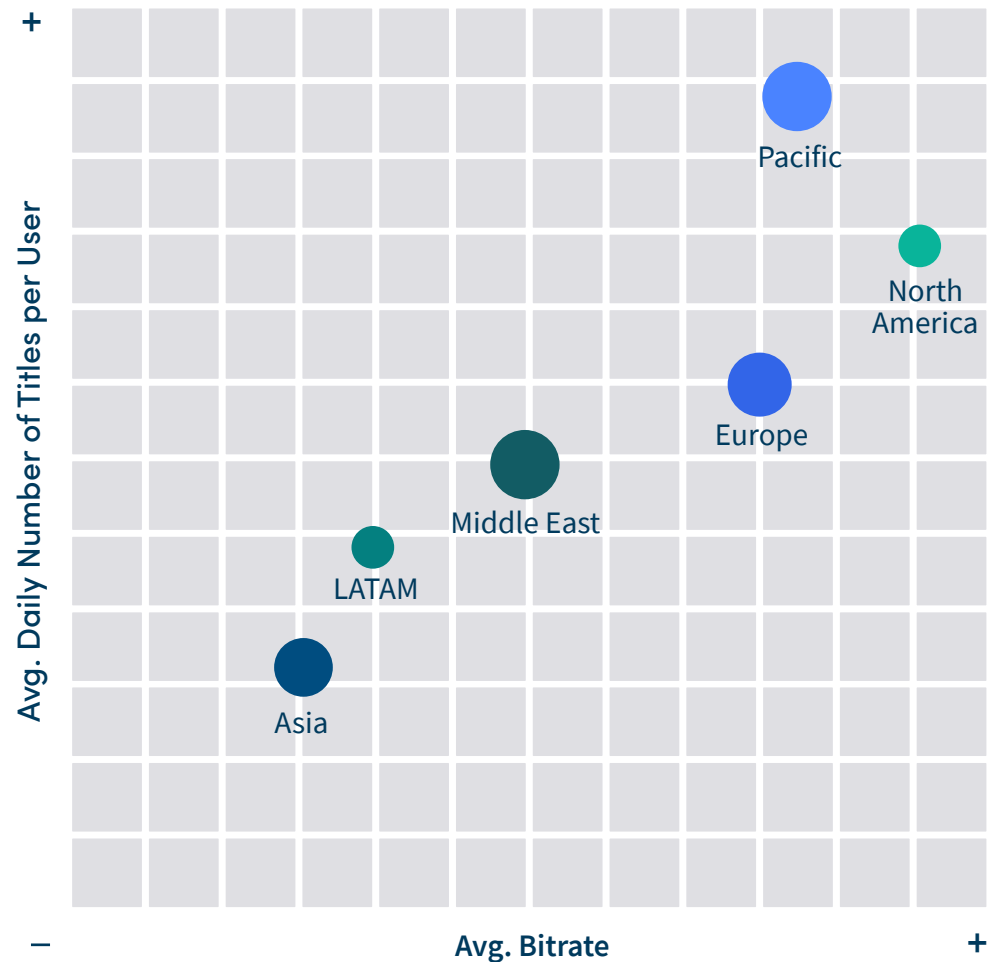
All regions made improvements in almost all metrics affecting the viewing experience. The Avg. bitrate was the metric where most regions struggled to improve. Half of them saw a decrease in their bitrates, the same ones that experienced a drop last year.



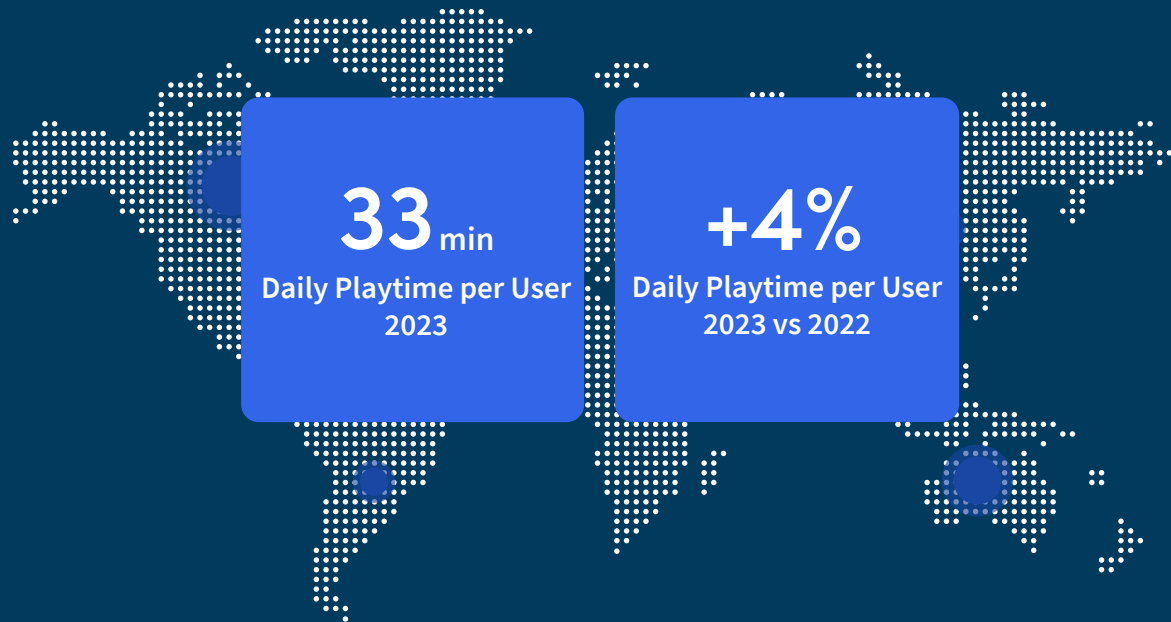
Quality vs Engagement

The rewards that come with providing a higher quality of experience

Providing superior QoE is, together with high-interest content, the best way of promoting viewer engagement. The correlation between the Avg. Bitrate and the Avg. Daily Titles per User for VoD is the perfect example of that. The higher the bitrate, the higher the number of titles consumed.



Linear TV — Engagement



Daily playtime per user for Linear TV made a comeback

Global user engagement with Linear TV content modestly increased, marking a positive shift after last year’s steep decline. Regionally, it was more of a mixed bag.

Avg. Daily Playtime per User

North America

43 min — Absolute 2023
-9% — Change vs 2022

LATAM

22 min — Absolute 2023
+10% — Change vs 2022

Europe

61 min — Absolute 2023
+0% — Change vs 2022

Middle East

33 min — Absolute 2023
+6% — Change vs 2022

Asia

17 min — Absolute 2023
-14% — Change vs 2022

Pacific

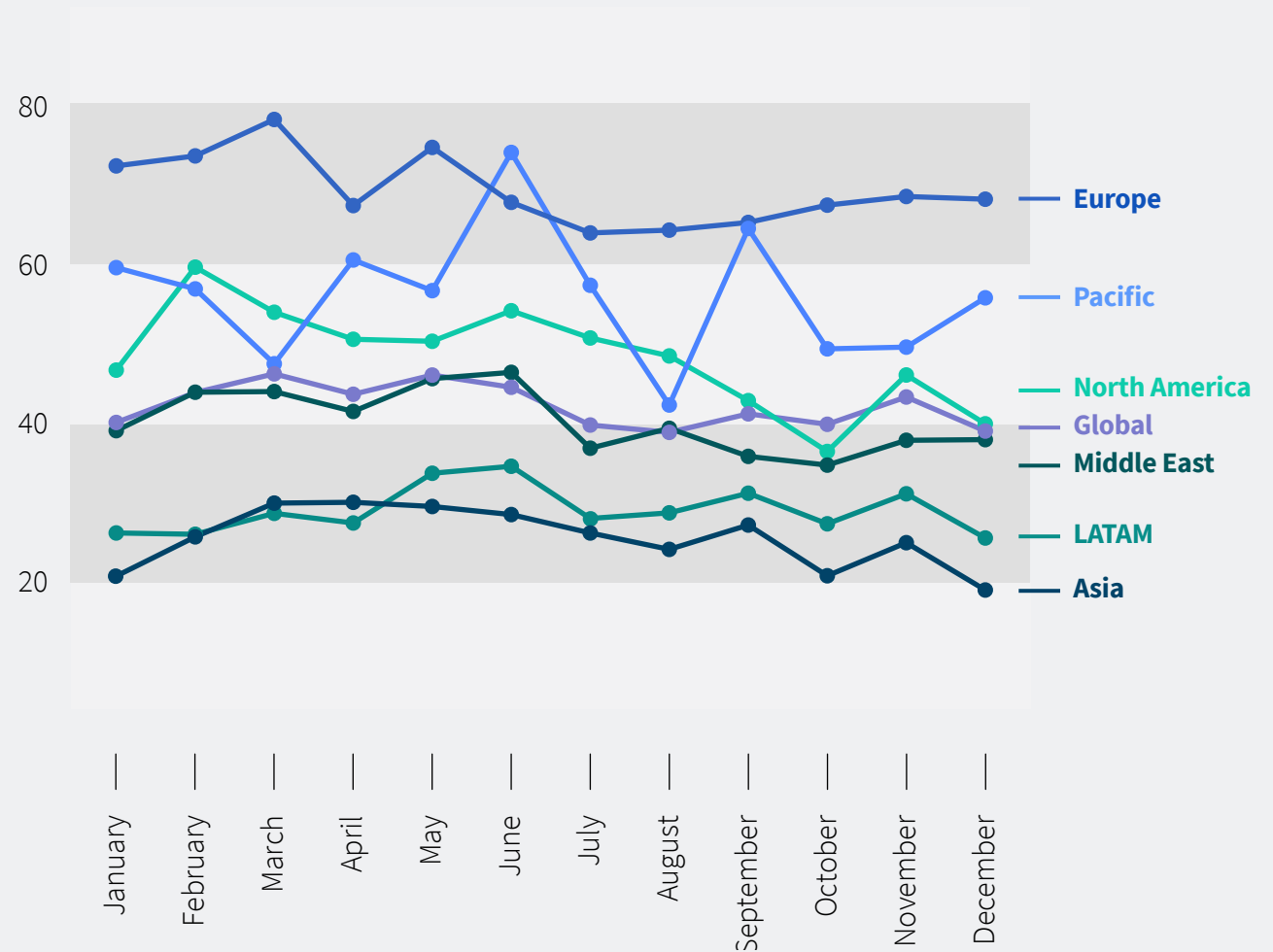
37 min — Absolute 2023
-27% — Change vs 2022

Linear TV – Engagement

Monthly consumption varied globally and by region

In contrast to VoD, global daily playtime per user for Linear TV fluctuated throughout the year, especially in the Pacific. Different regions showed diverse trends, underscoring the significance of local preferences for linear content consumption.

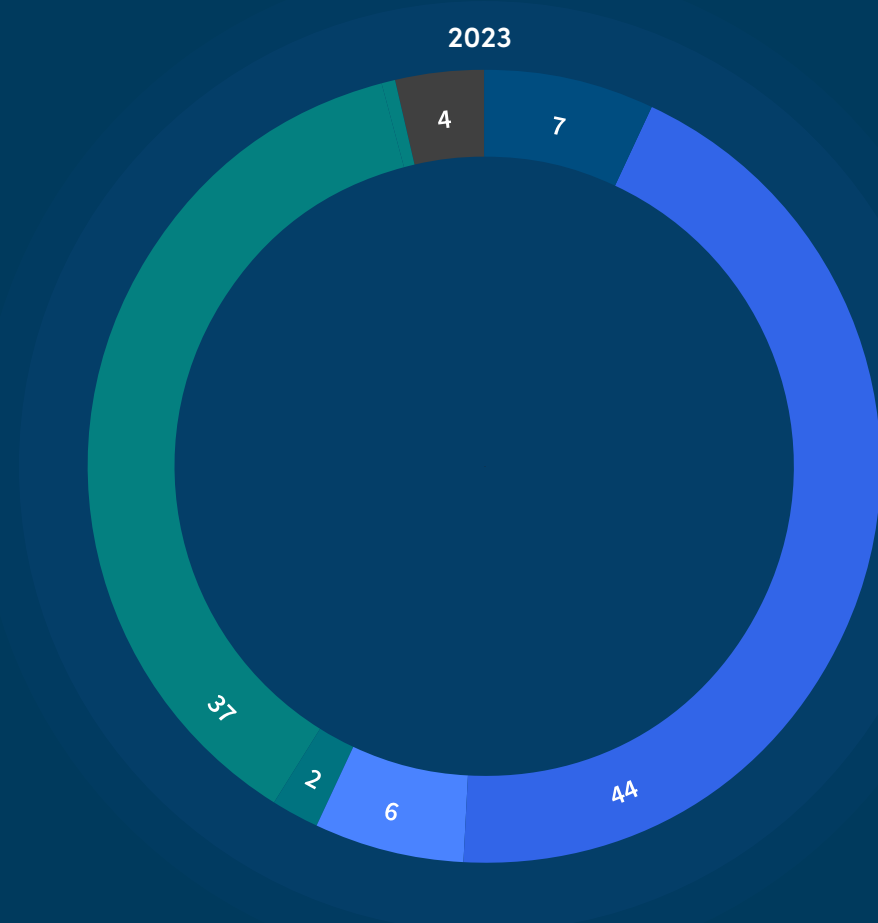
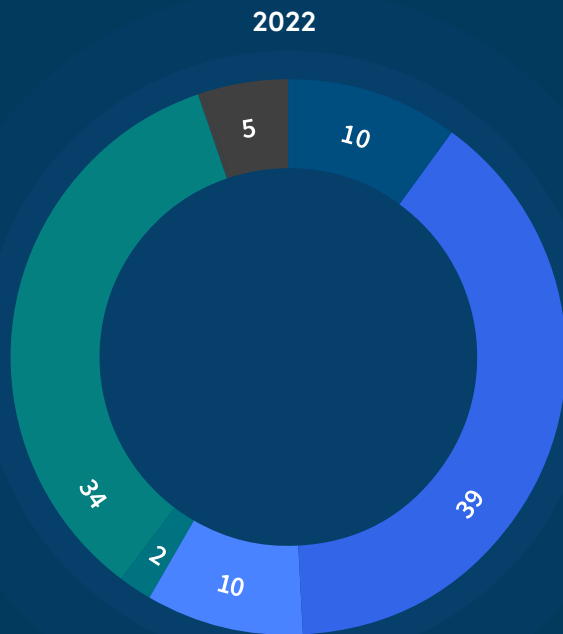
Avg. Daily Playtime per User (min)



Linear TV — Device Share

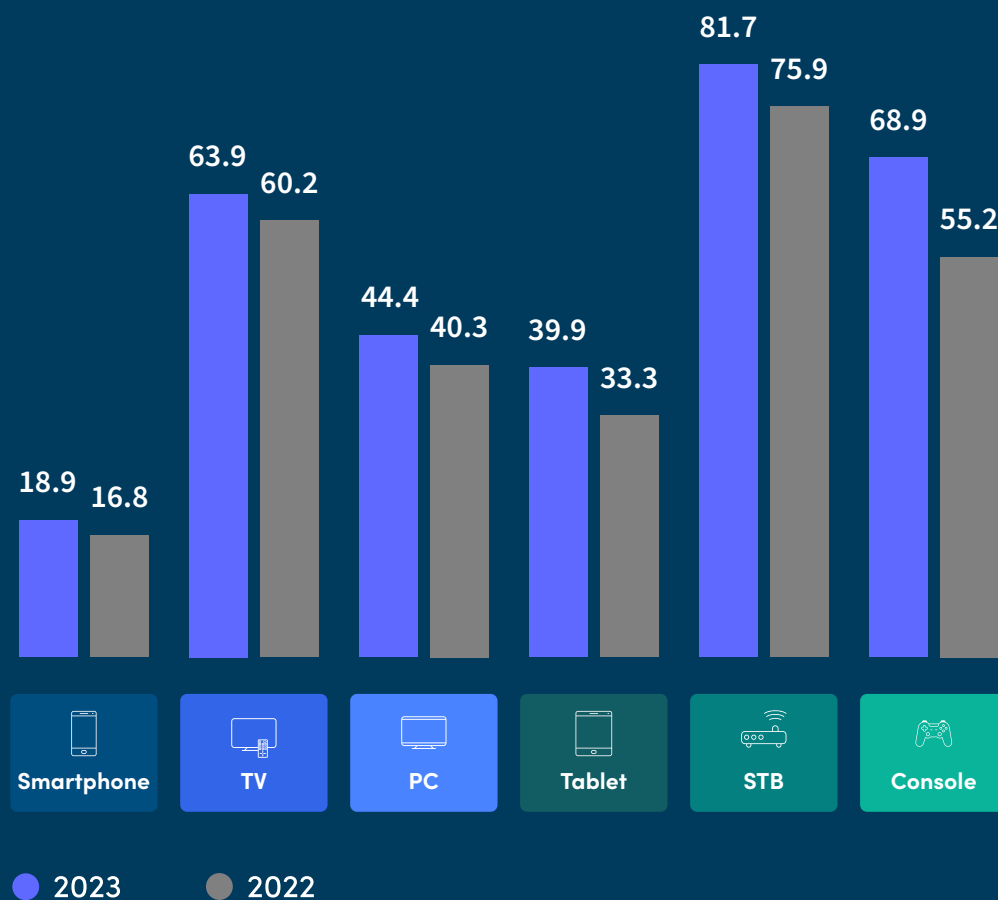
STBs were a bigger part of the Linear TV equation

Whereas VoD was all about Smart TVs and, to a lesser extent, STBs, the latter were almost head-to-head with TVs for Linear. Both increased their share, eating away at smaller screens. Consoles captured a negligible share of the total playtime.



Share of Total Playtime (%)





Linear TV – Device Engagement

Engagement increased across devices, peaking for large screens

Larger screens experienced the highest daily consumption per user. However, in contrast to VoD, all devices saw an increase in their engagement. STBs led in absolute terms, while consoles, despite their negligible share in total linear playtime, experienced the most significant uptick. Smartphones were used for shorter streaming sessions.

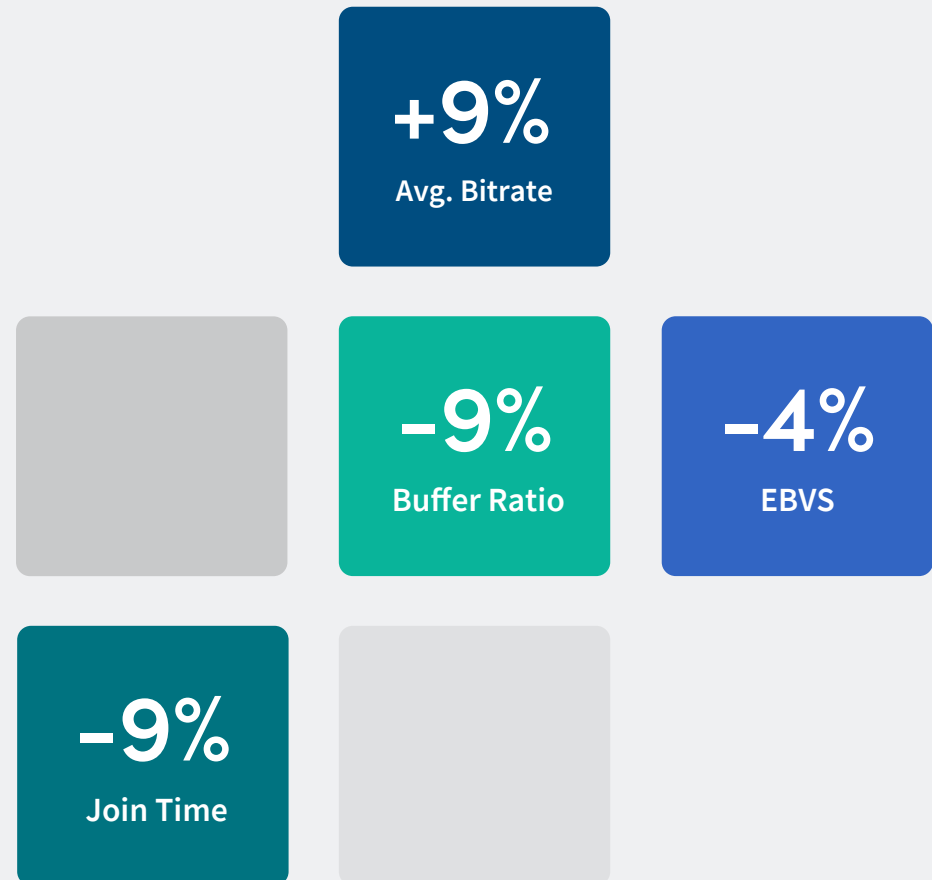
█ Avg. Daily Playtime per User (min)

Linear TV – Global Quality

Linear TV bitrates continued to improve along with the rest of KPIs

The global Quality of Experience for Linear TV improved across the board in 2023, with all metrics seeing improvements. The Avg. bitrate, a key metric for streaming live events, improved for the second year in a row, suggesting there is still room—and incentives—for further improvement.

Global Avg. (2023 vs 2022)

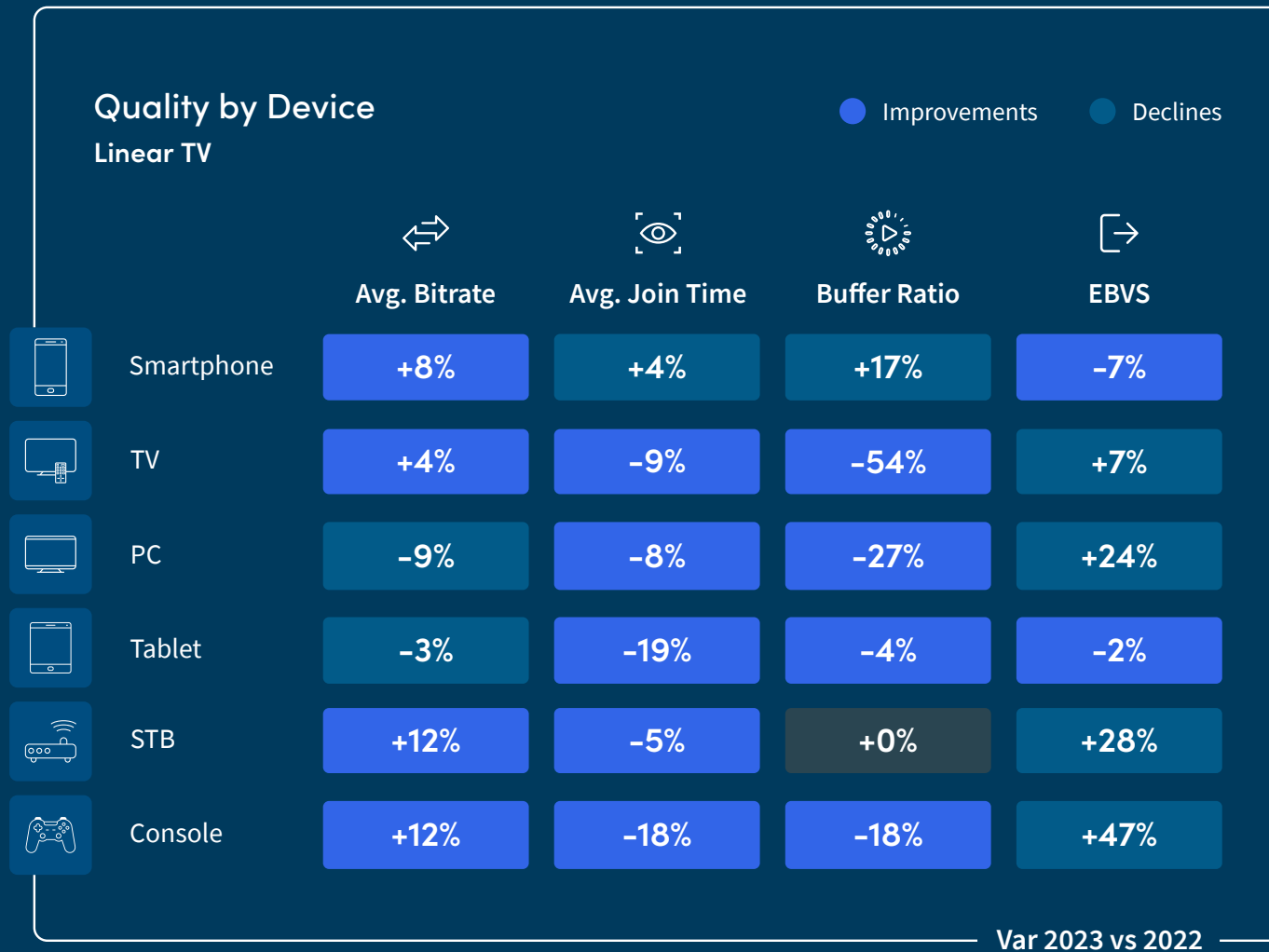




Linear TV – Quality by Region

Robust quality improvements across most regions and KPIs

Quality improved across all regions. However, compared to VoD, more regions experienced improvements in all metrics. The Avg. bitrate improved most significantly in Asia, the Pacific, and Europe, while LATAM was the only region to see a drop in this KPI.



Metrics Cheat Sheet

Avg. Daily Playtime per User (min)

The daily time that the average user of a streaming service spends streaming content. It is calculated as an average across all services, serving as a good indicator of user engagement.

Avg. Join Time (sec)

Join time is a metric measuring the amount of time from when the video player is initiated (either via user action or by autoplay) to when the first video content frame is played. Join Time can be increased to let the video load, decreasing buffering.

Avg. Daily Number of Titles per User

The average number of titles that the average user of an individual streaming service watches per day.

Buffer Ratio (%)

Buffer Ratio represents the time users experience buffering during content streaming. Buffering is when content stalls in the middle of playback due to a buffer underrun.

Avg. Bitrate (Mbps)

The basis of video quality, bitrate measures the amount of video data transferred per second and is reflective of the video quality being sent to the end-user device. The higher the bitrate, the higher the video quality. High bitrates are necessary.

Exit Before Video Start (EBVS %)

Video connection attempts without errors that terminated before the first frame of the video was displayed.



Benchmarks

Compare your performance with the industry average

NPAA's QoE Benchmarks lets you understand how you perform on key quality KPIs compared with competitors in your region



Pinpoint weak performing areas based on industry standards



Track progress to optimize investments and strengthen actions



Identify quality trends for specific markets to inform regional strategies



Improve agreements with third-party providers to ensure premium QoE

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About NPAW

NPAW is a video intelligence company helping online streaming services grow. A global leader in its space, NPAW has over a decade of experience developing groundbreaking, scalable analytics solutions to optimize performance and user engagement, helping customers to build media experiences that maximize revenue. Its Suite of analytics apps provides advanced visibility of platform performance, audience behavior, advertising and content efficiency and app navigation in real-time to support data-driven decisions.

NPAW serves more than 190 video services and processes over 120 billion plays per year worldwide. Established in 2008 by co-founders of the video streaming service Wuaki TV, which was later sold to Rakuten, NPAW has offices in Barcelona and New York with teams around the world.

For more information, please visit us:



For more information about the measurements you can make with NPAW, contact us here to set up a free consultation with a streaming video expert

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