



# NPAW Video Streaming Industry Report 2024

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# Streaming Trends 2024: Engagement Drops, but Quality Improves

The 2024 insights show that streaming platforms have seen mixed results in engagement and quality. Video-on-demand (VOD) Playtime per User has dipped slightly, with fewer titles watched. The decline was more pronounced in the second half of the year, though Q4 showed some recovery. Despite lower engagement, quality metrics improved significantly – Bitrate increased and Buffer Ratio decreased by 35%.

Linear TV, however, remained steady. Playtime increased slightly to 35 minutes per user, while the Number of Titles watched saw a minor drop. Quality improvements were even more significant, with a 17% jump in Bitrate and a 31% reduction in Buffer Ratio.

Regional trends varied, with the Pacific region leading in engagement and Asia seeing the lowest. TV remains the dominant device for streaming, while consoles saw the highest Playtime per User. Despite some engagement declines, overall streaming quality is at its best.

**Ferran G. Vilaró**

CEO & Co-Founder of NPAW



# Key Takeaways

## Global VOD Engagement dropped after a strong H1

Q4 did improve compared to Q3. Slightly lower engagement vs 2023 with viewers watching less titles and for a shorter time.

## Global Engagement in Linear TV shows slight increase

Q4 did improve compared to Q3. Slightly lower engagement vs 2023 with viewers watching less titles and for a shorter time.

## Regional VOD Engagement & Quality

Decrease in engagement vs 2023 in most regions. Quality improvements in most regions for all KPIs, especially in Buffer Ratio (%) and Avg. Join Time.

## Global VOD Quality improvements in most metrics

Buffer Ratio (%), Bitrate, and Avg. Join Time improved vs. 2023, with Buffer Ratio showing the largest drop (-35%).

## Linear TV Global Quality improved across the board

Significant reduction in Buffer Ratio, complemented by a strong increase in Bitrate, but offset by a slight increase in Avg. Join Time and a rise in EBVS.

## Regional Linear TV Engagement & Quality

Europe continues to be the most engaged region, with ME seeing the largest drop in Avg. Playtime and Titles per User. Quality KPIs in most regions have improved.



# Annual Report 2024

This report examines the state of the video streaming industry on a global and regional level. It compares 2024 engagement and quality KPIs against the 2023 data.

The data analyzed in this report were extracted from the NPAW Suite from January to December 2024 and compared to data from 2023.



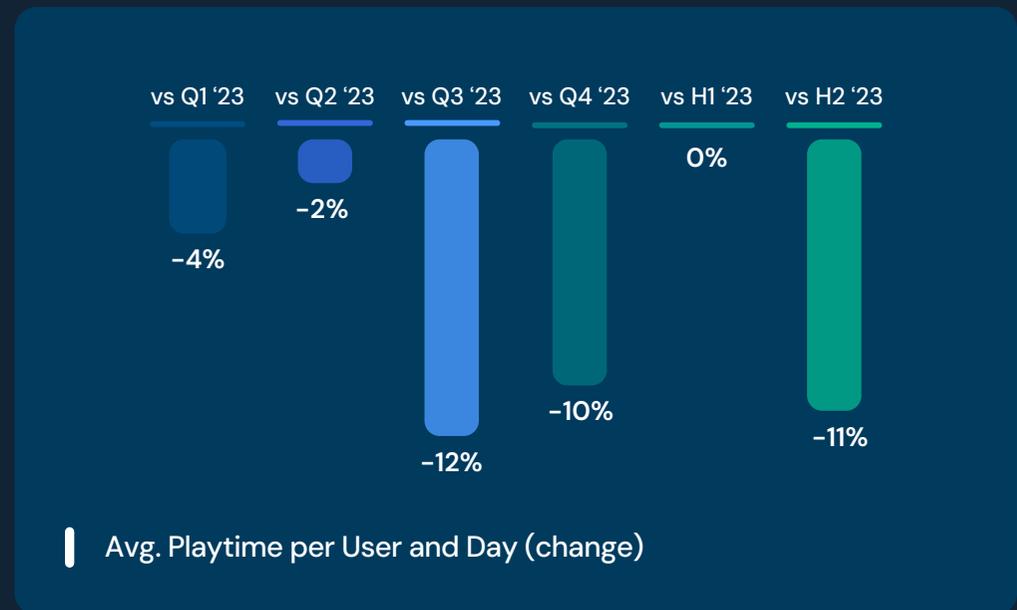
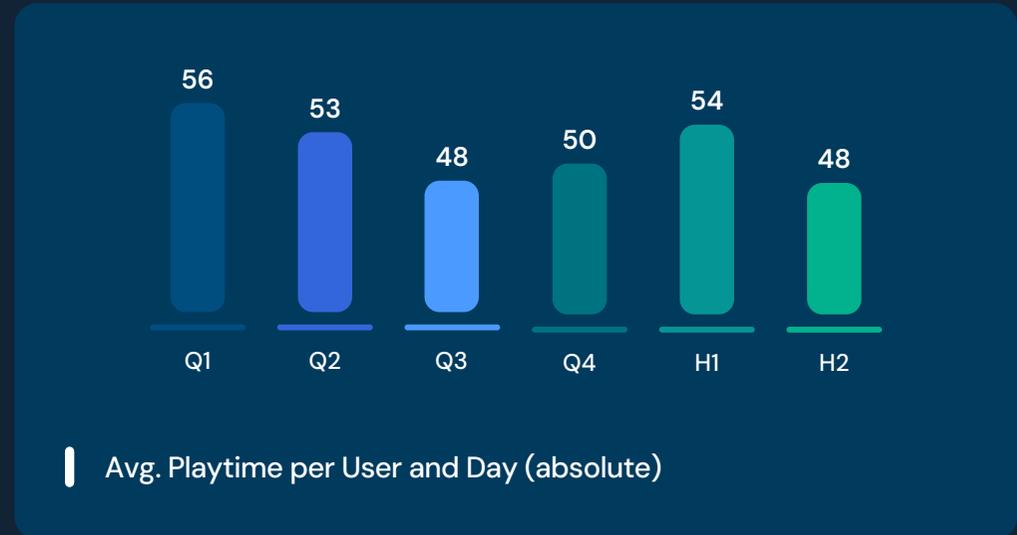
# VoD Global Engagement

## Q1 and H1 show higher engagement rates than the rest of the year

This indicates that users on average were more engaged with content in the 1st half for 2024. 2024 saw dips in Average Playtime per User in most quarters, compared to 2023.

Global 2024  
**51** min

Global '24 vs '23  
**-3%**





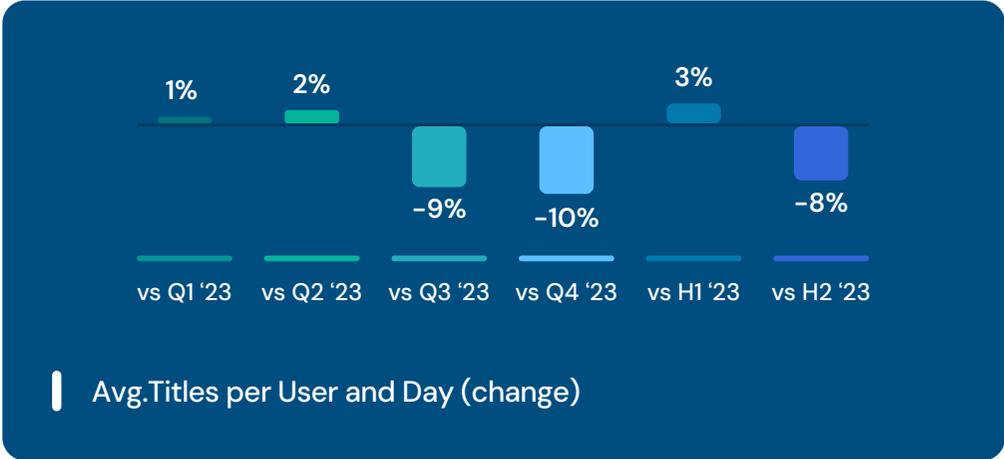
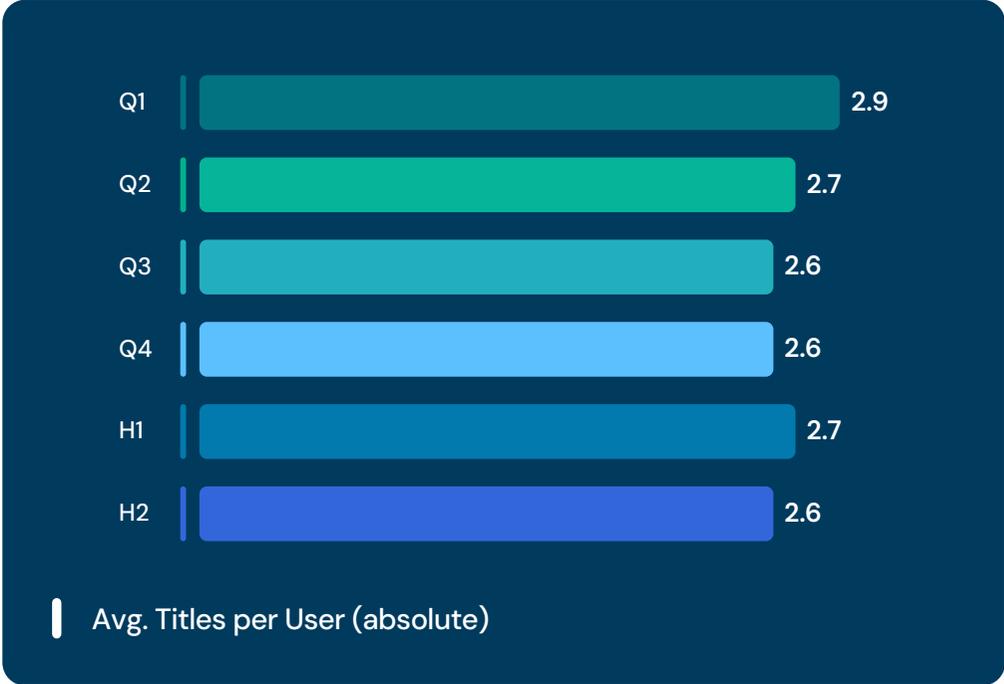
### Avg. Titles Per User sees slight decrease from Q1 to Q4

By and large, VOD service providers saw a minor decline in viewership per user in 2024, compared to the previous year.

However, this is not a significant decrease, with all services still averaging at least 2.6 Titles per User per Day.

Global 2024  
**2.6** min

Global '24 vs '23  
**-1** %





# VoD Engagement by Region



## Global VOD Engagement dropped after a strong H1

We notice slightly lower engagement vs 2023, with small decreases in Avg. Playtime per User and Titles per User.

### Avg. Daily Number Of Titles Per User

#### North America

3.7 titles — Absolute 2024  
-1% — Change vs 2023

#### LATAM

2.3 titles — Absolute 2024  
-10% — Change vs 2023

#### Europe

3.3 titles — Absolute 2024  
-4% — Change vs 2023

#### Middle East

3 titles — Absolute 2024  
3% — Change vs 2023

#### Asia

1.9 titles — Absolute 2024  
-6% — Change vs 2023

#### Pacific

4.3 titles — Absolute 2024  
-6% — Change vs 2023



## Global VOD Quality shows improvements in most metrics

Buffer Ratio (%), Bitrate and Avg. Join Time all showed improvements over 2023. The greatest improvement seen was in buffer ratio (-35%). It points to the fact that Avg. Join Time is not the only reason/trigger for Buffer Ratio (%)’s variation.

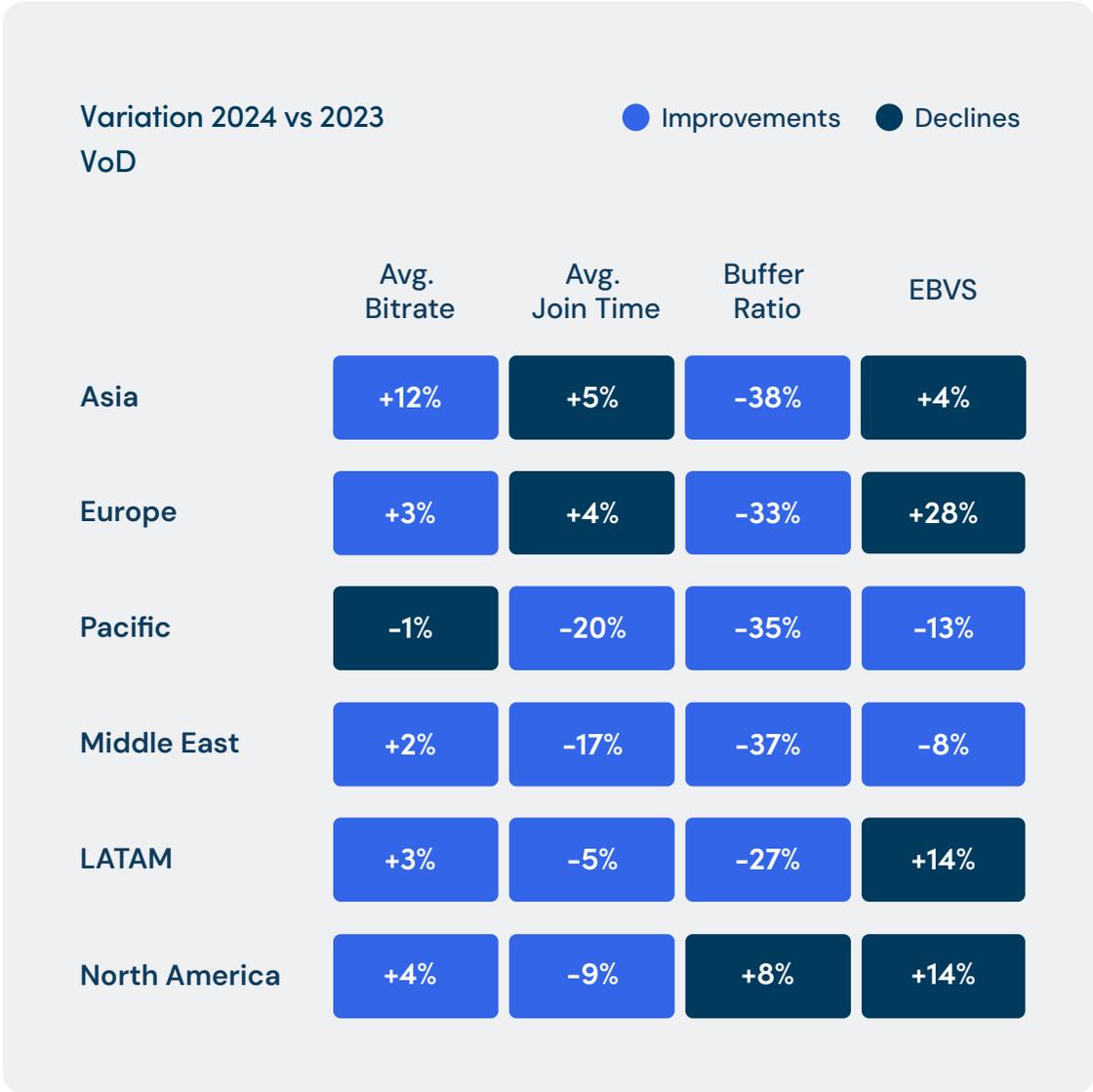
Quality 2024 vs 2023

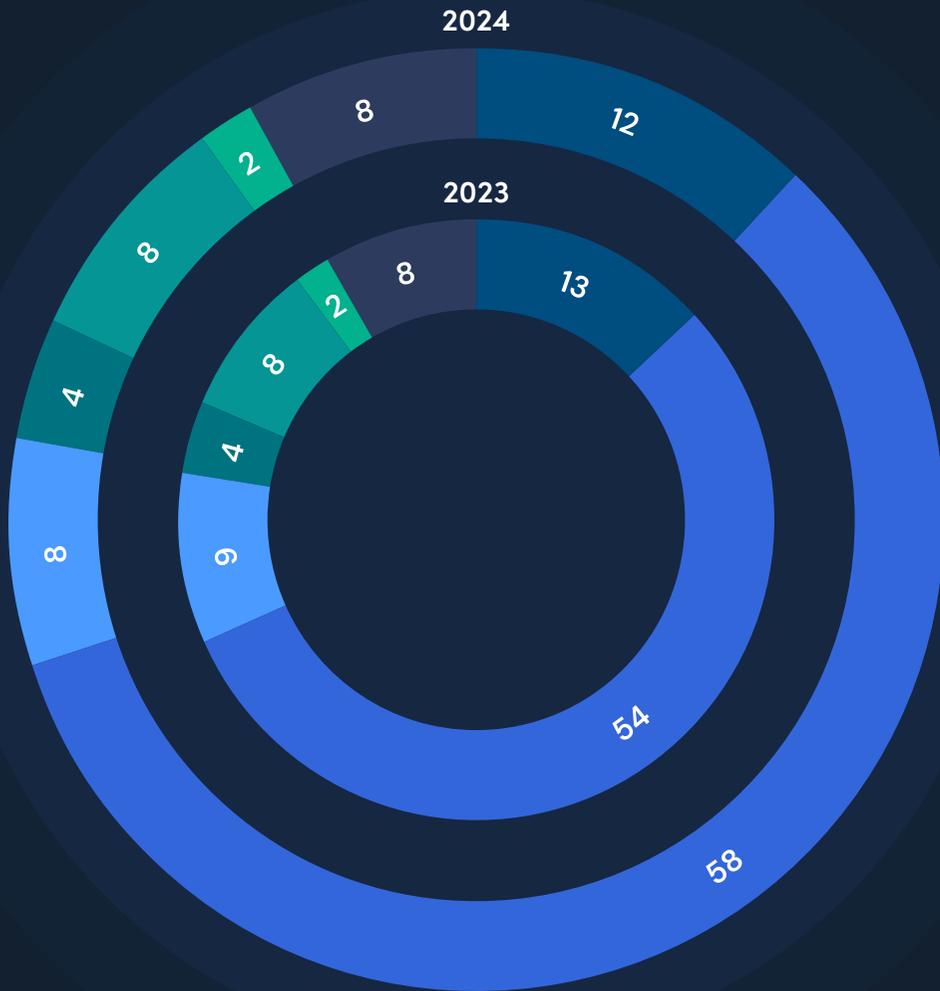




## Quality KPIs improved in most regions for Video On Demand

There’s a common positive trend for most KPIs in all regions. Especially in Buffer Ratio (%) and Avg. Join Time. The Middle East led the way, showing improvements across all key metrics.

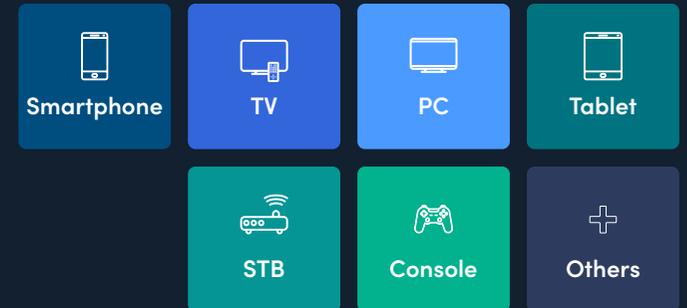




## TV continues to dominate Device Share with 58%

With over half of all devices being TV, it reflects the users' propensity to watch programming at home on the large screen. All other devices maintain a similar share compared to 2023.

Share of Total Playtime (%)

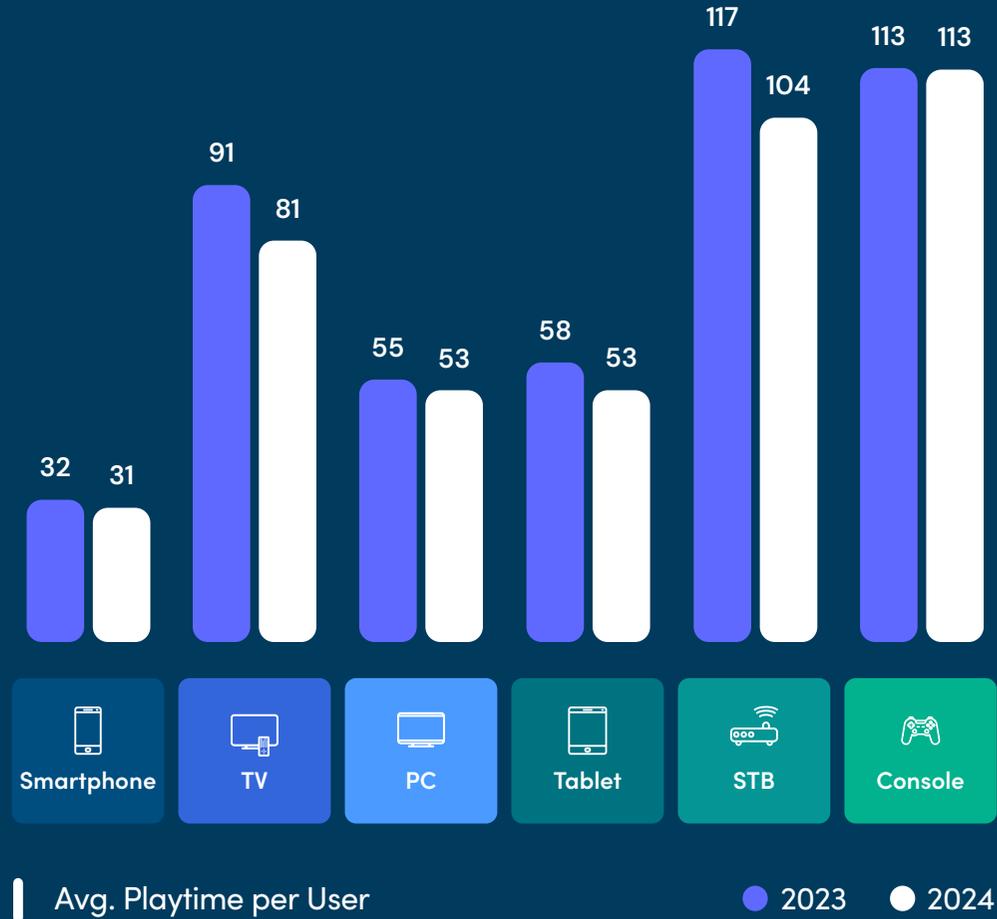
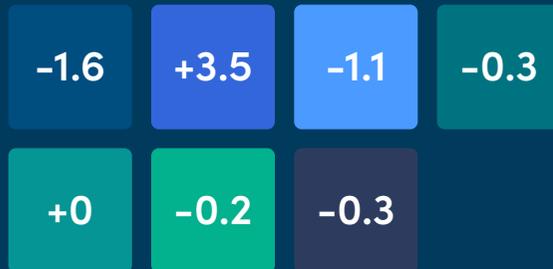




## All devices had decreases in Average Playtime per User vs '23

TV and STB both saw a drop in playtime of (-11%). Consoles showed the highest Avg. Playtime per User, but only accounted for 2% of total Device Share.

Percentage Points Device Share  
Var '24 vs '23

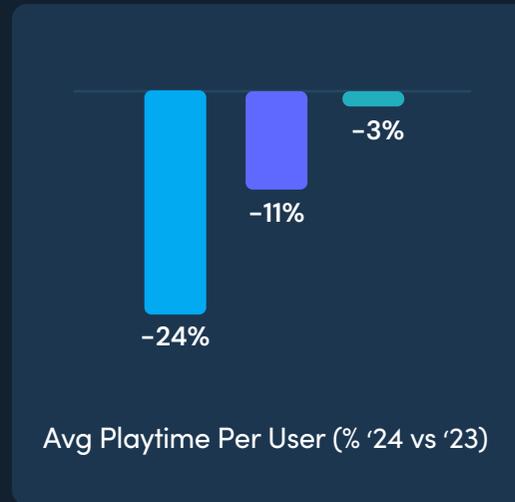
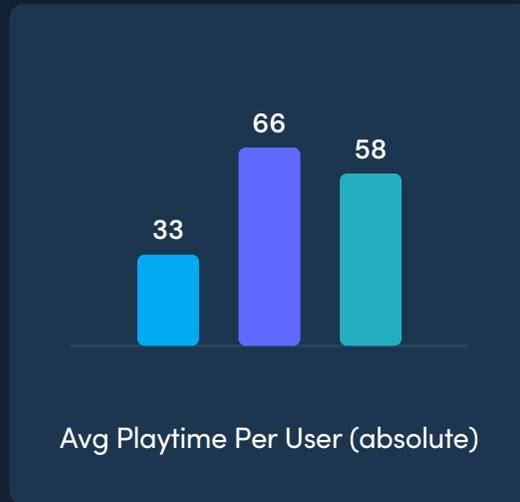




## STB achieved the highest increases in quality metrics in 2024

While all other devices have shown declines in some quality KPIs, STB had double-digit improvements in each metric. This signals a vast enhancement in STB capability and greater adoption by service providers, compared to 2023.



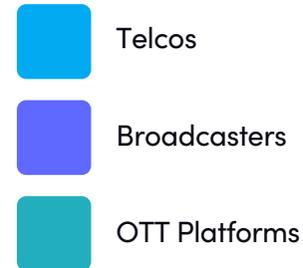
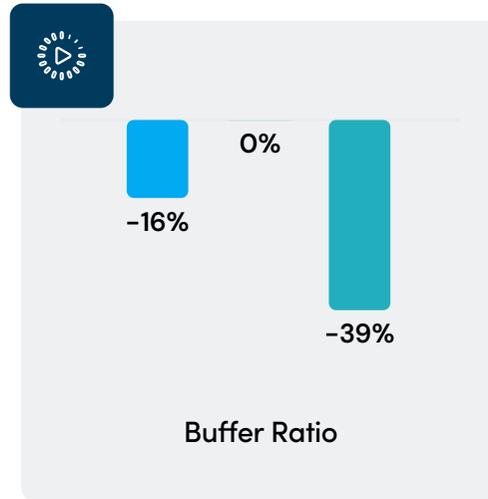
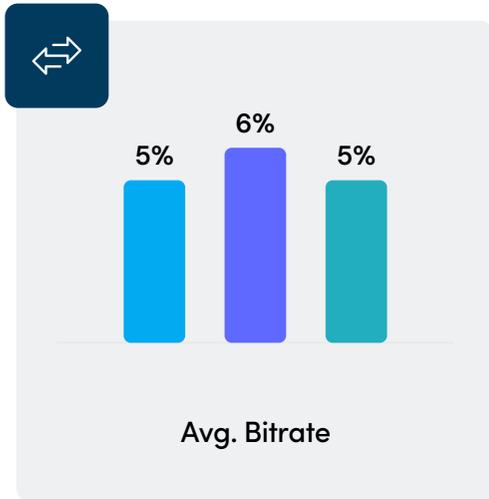


## Telcos see a sharp decline in Avg. Playtime per User

Broadcasters again have the highest average titles (3.6) which indicates a likely greater content variety for users compared to Telcos and OTT Platforms.



Quality 2024 vs 2023



## Buffer Ratio drastically reduced on OTT Platforms

While Telcos showed improvements in all quality KPIs, Broadcasters saw a dramatic increase in EBVS vs 2023. Each industry type saw an increase in Avg. Bitrate.

Quality 2024 vs 2023

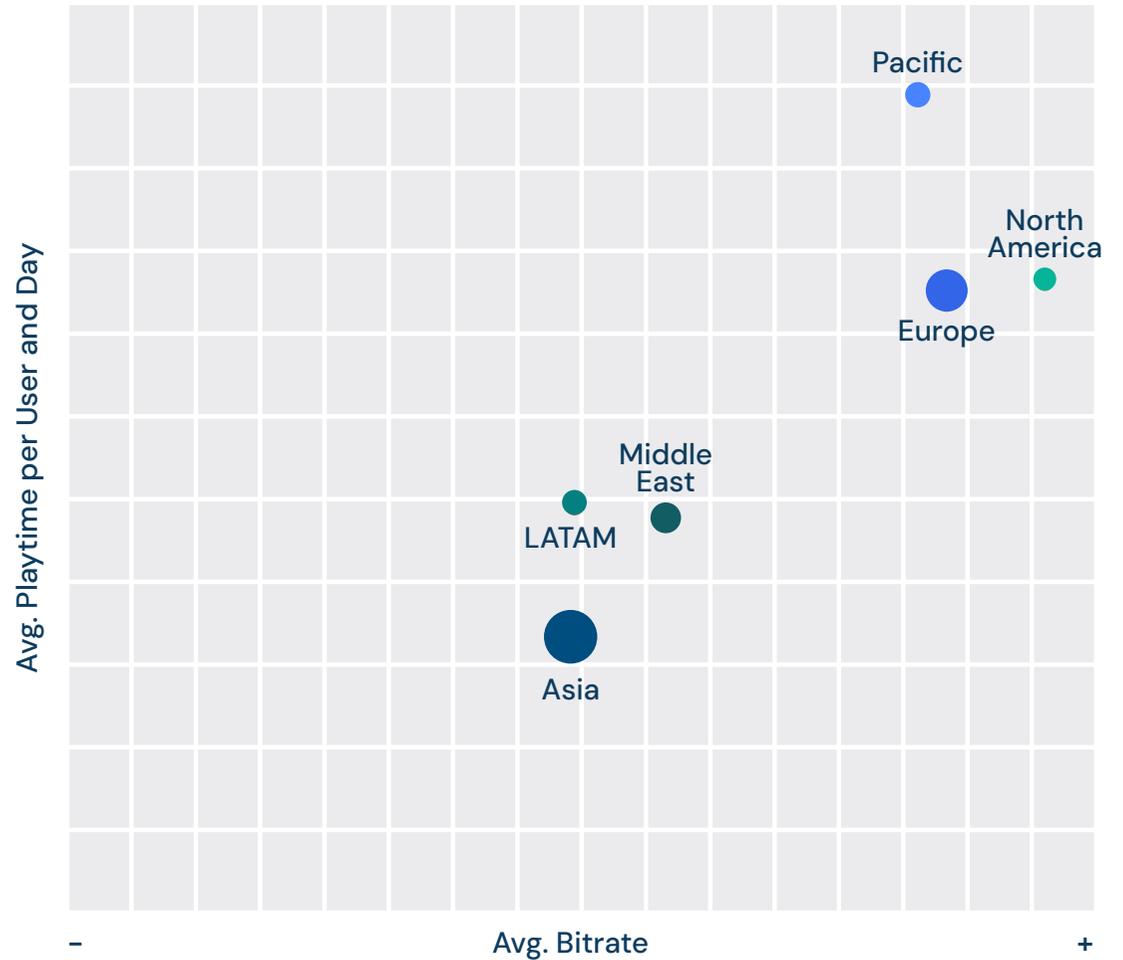


## Pacific, North America & Europe leading the way

The Pacific region recorded a very high average bitrate, as well as the highest average playtime per user of all regions.

Europe and North America also had strong benchmarks in these metrics, showing that VoD quality and engagement is thriving in these regions.

VoD Bitrate vs Avg. Playtime per User





# Linear TV Global Engagement

## Average Playtime per User remains stable compared to 2023

On Linear TV, most viewers spent just over 30 minutes per day across all regions.

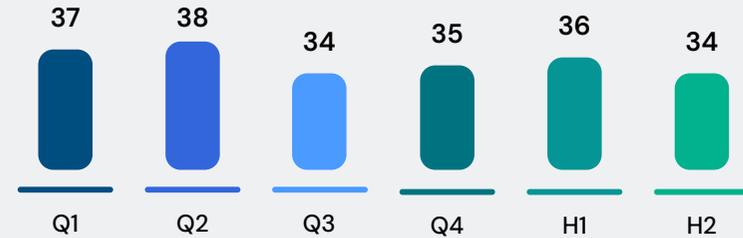
While we did see slight decreases in Q1, Q2 and Q3 versus the same periods in 2023, overall we saw a 4% increase over the previous year.

Global 2024

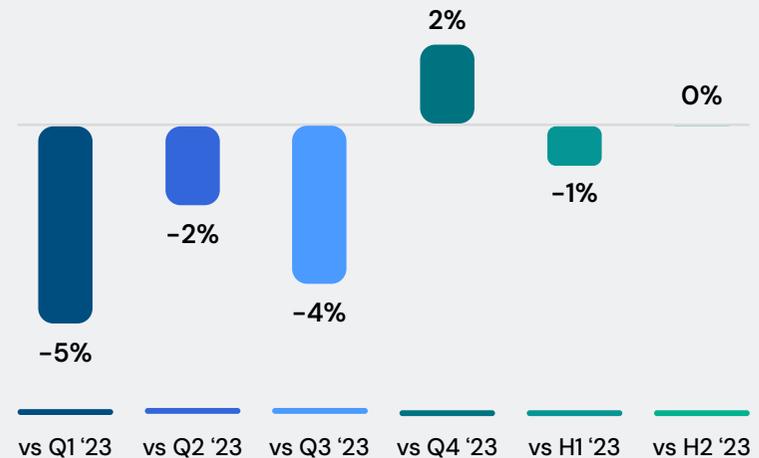
**35** min

Global '24 vs '23

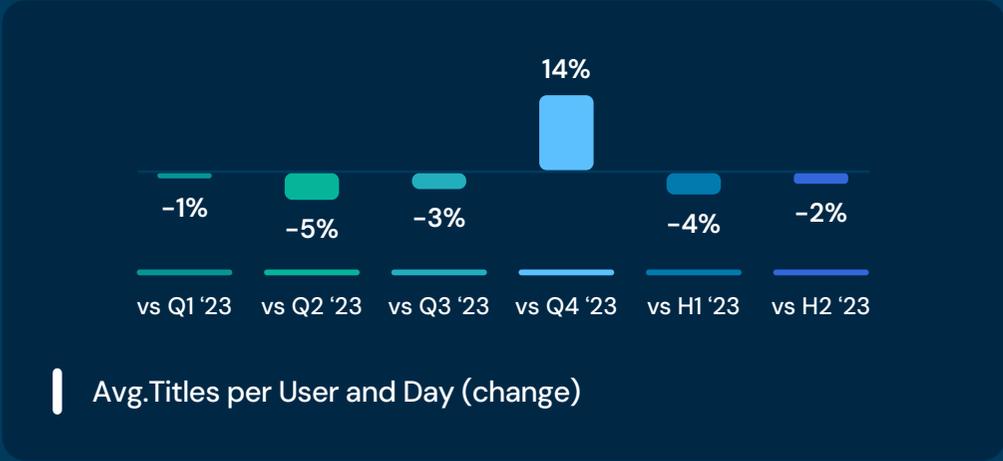
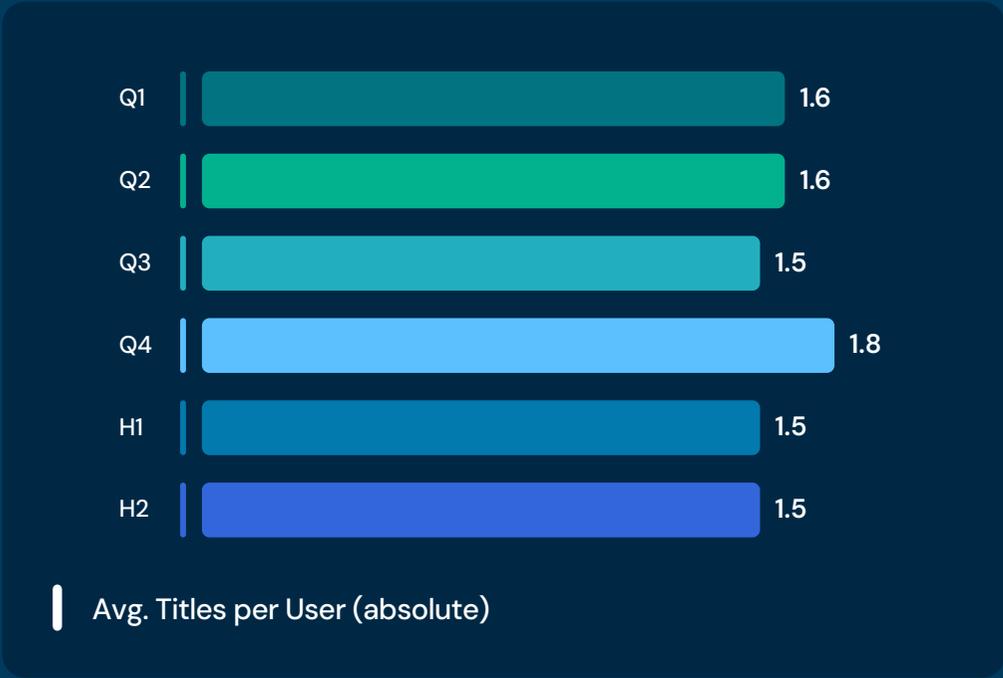
**+4** %



Avg. Playtime per User and Day (absolute)



Avg. Playtime per User and Day (change)



## Average Titles per User peaked at the end of the year

The end of 2024 saw a 14% increase in Average Titles per User over Q4 2023.

With viewers averaging 1.5 Titles per Day, this is down slightly from the previous year. This decrease was evident for the majority of 2024.

Global 2024

**1.5** titles

Global '24 vs '23

**-3%**



# Linear TV Engagement by Region

## Avg. Daily Number Of Titles per User

### North America

2.1 titles — Absolute 2024  
-2% — Change vs 2023

### LATAM

1.3 titles — Absolute 2024  
-3% — Change vs 2023

### Europe

2.1 titles — Absolute 2024  
-4% — Change vs 2023

### Middle East

1.5 titles — Absolute 2024  
-16% — Change vs 2023

### Asia

1.1 titles — Absolute 2024  
+3% — Change vs 2023

### Pacific

1.8 titles — Absolute 2024  
+7% — Change vs 2023

## Europe tops for average minutes

Users in Europe watched the most Linear TV. However, there was a 3% decline compared to 2023.

The Pacific region shows the most growth with a 26% increase in Avg. Daily Playtime per User.



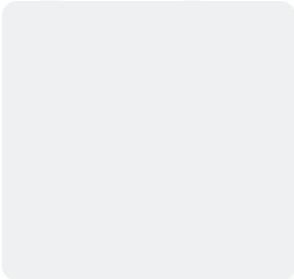
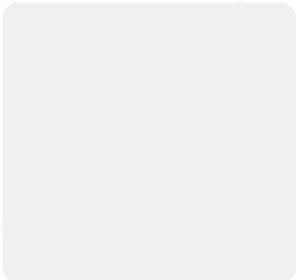
Avg. Playtime per User



## Significant quality increases in Average Bitrate and Buffer Ratio

Buffer Ratio decreased by 31% on average across all regions, indicating a massive improvement in Linear TV Quality.

With global Average Bitrate also showing a healthy 17% increase, this is a reflection of the commitment to better infrastructure and overall service in all regions.





## Major quality increases across all regions on Linear TV

With all regions showing improvement in Average Bitrate, and most having decreases in Buffer Ratio, Linear TV Quality is vastly superior to 2023.

However, most regions also experienced large increase in Exit Before Video Start (EBVS).

The outstanding region was LATAM, showing quality increases in every metric.





## TV and Set-Top-Box dominate Device Share

With very similar results to 2023, STBs and TVs are the devices of choice for Linear TV viewing.

TV share increased to 48%, while STBs held steady at 37% – the same as the previous year.

Share of Total Playtime (%)



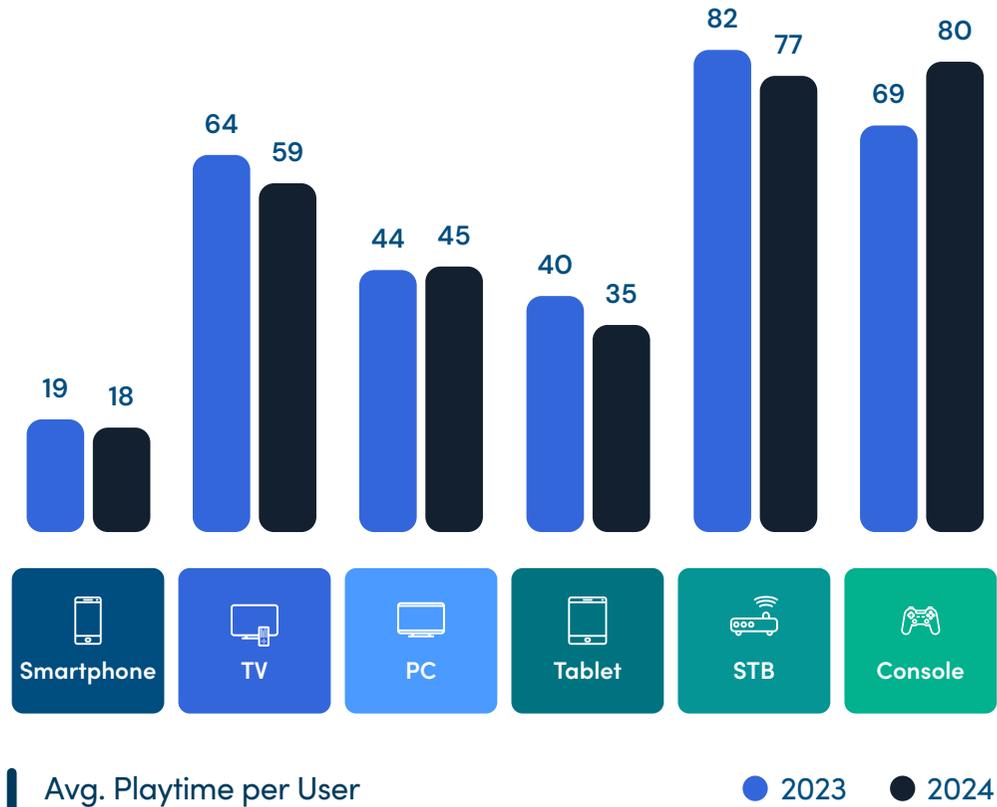


## STB tops for Average Playtime

While consoles did have a slightly higher Avg. Playtime per User (79.7 minutes), consoles only accounted for less than 1% of device share.

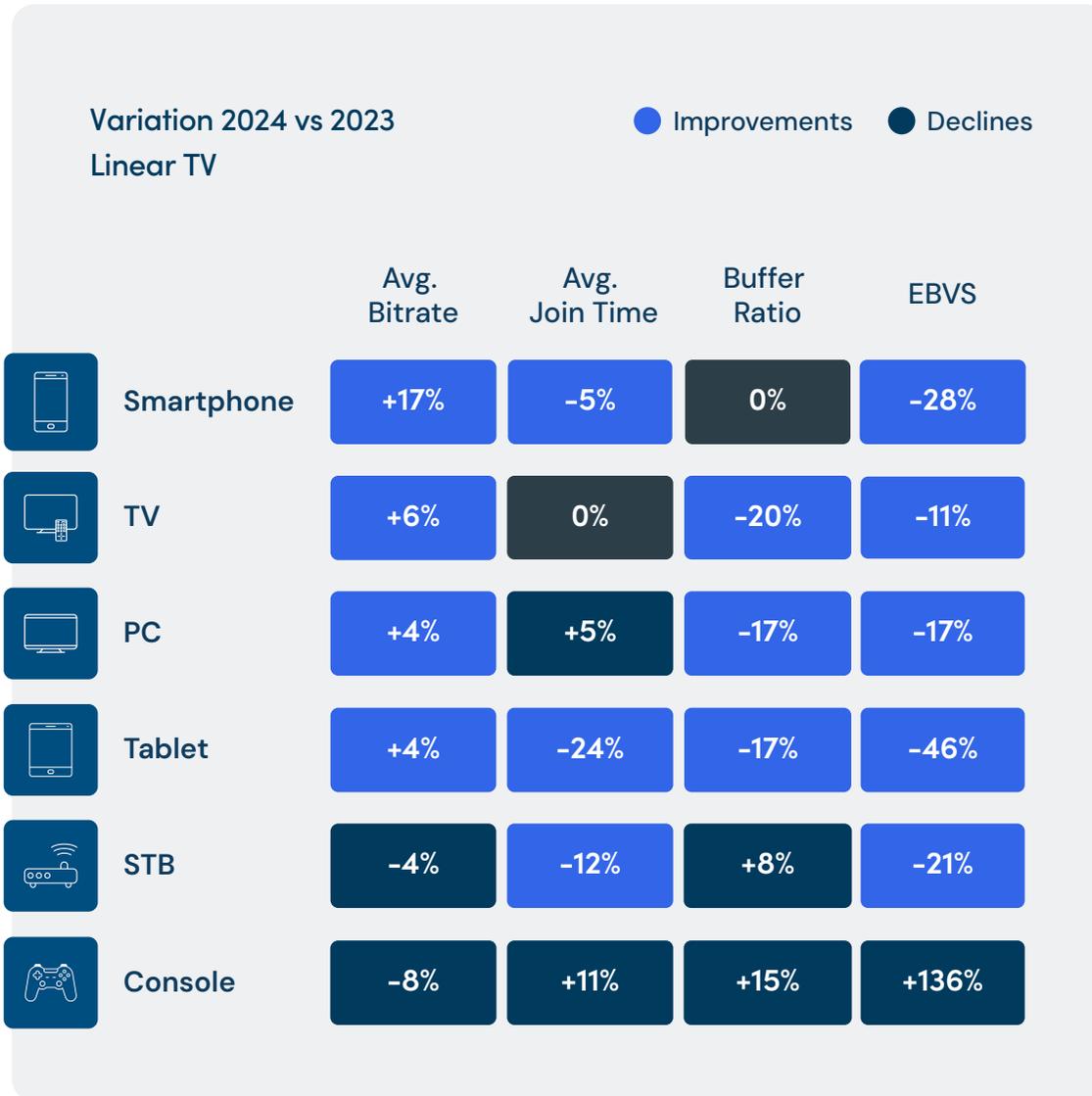
STBs and TVs had averages of 77.3 and 59.2 minutes respectively.

Most devices saw a decrease in avg. Playtime per User vs 2023 stats.



### Percentage Points Device Share Var '24 vs '23



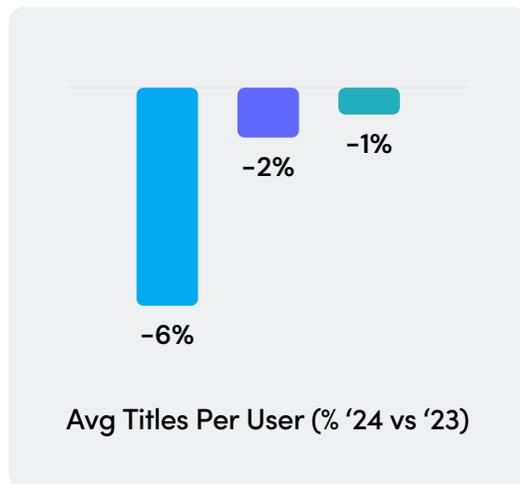
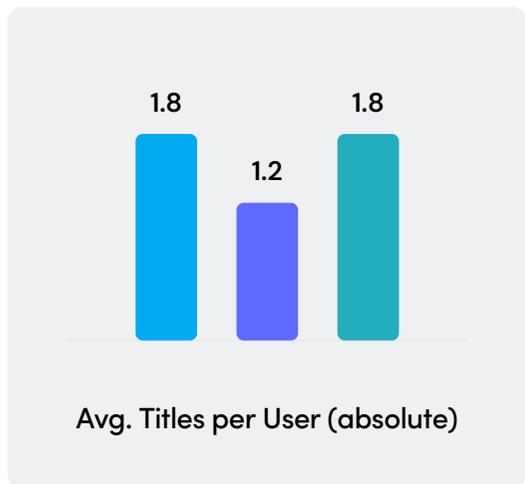
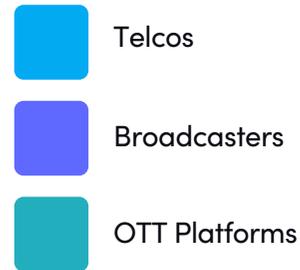
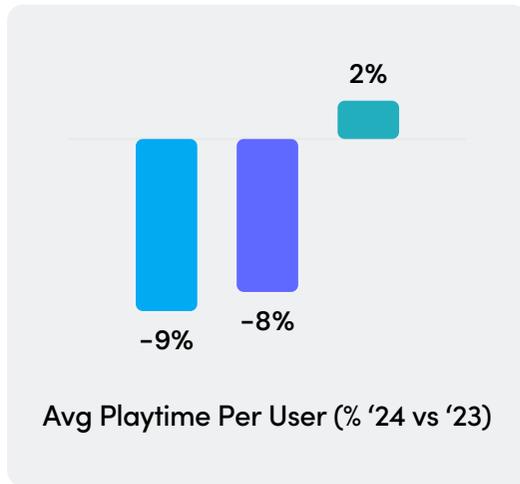
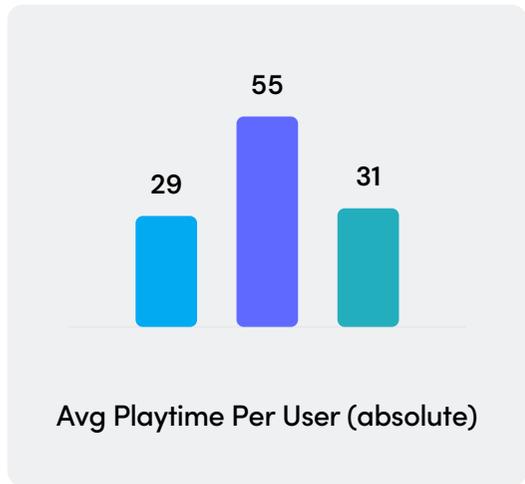


## Tablets show improvements in all KPIs

With the exception of consoles, all devices had some improvements in key metrics. TVs, PCs and Tablets saw tremendous decreases in Buffer Ratio.

Most devices saw EBVS decrease dramatically, with consoles being the exception.

This is an indicator that users are starting the video journey more effectively than in the previous year.

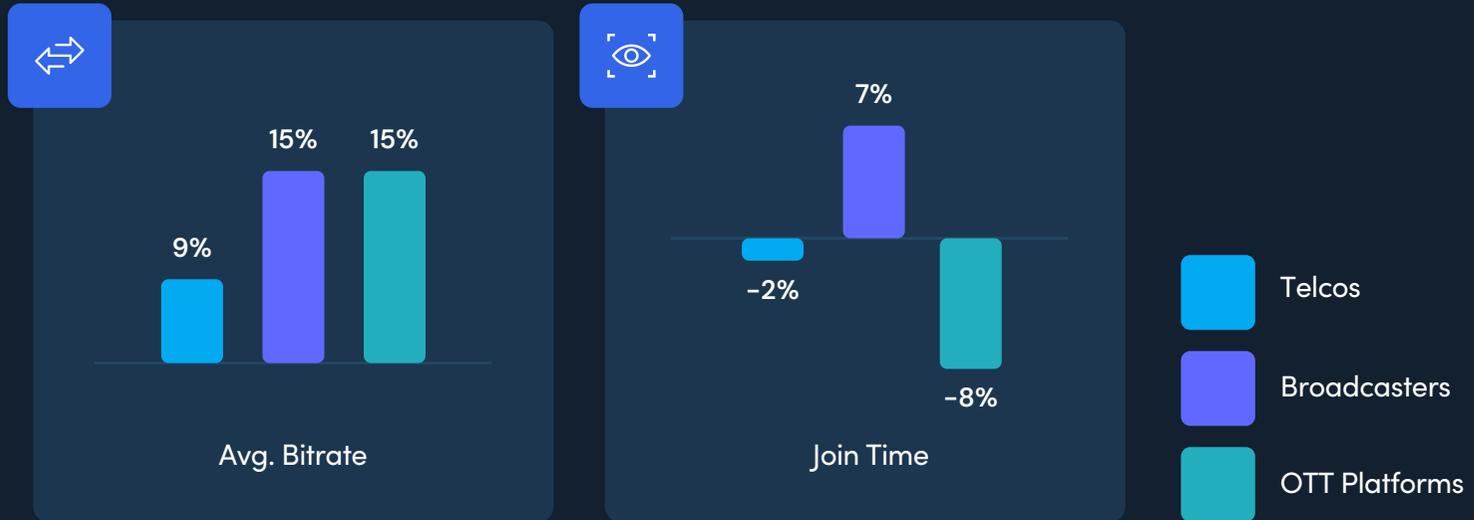


## Broadcasters had highest Avg Playtime Per User

Telcos and OTT Platforms had the highest Average Titles per User.

Compared to 2023, all segments saw a drop in Avg Playtime and Titles Per User – the exception being OTT Platforms with a 2% uplift in playtime.

### Quality 2024 vs 2023



## Avg Bitrate increased across the board

Telcos, Broadcasters & OTT Platforms all experienced strong gains in average bitrate.

OTT Platforms saw a tremendous decrease in buffer ratio of 32%.



Quality 2024 vs 2023

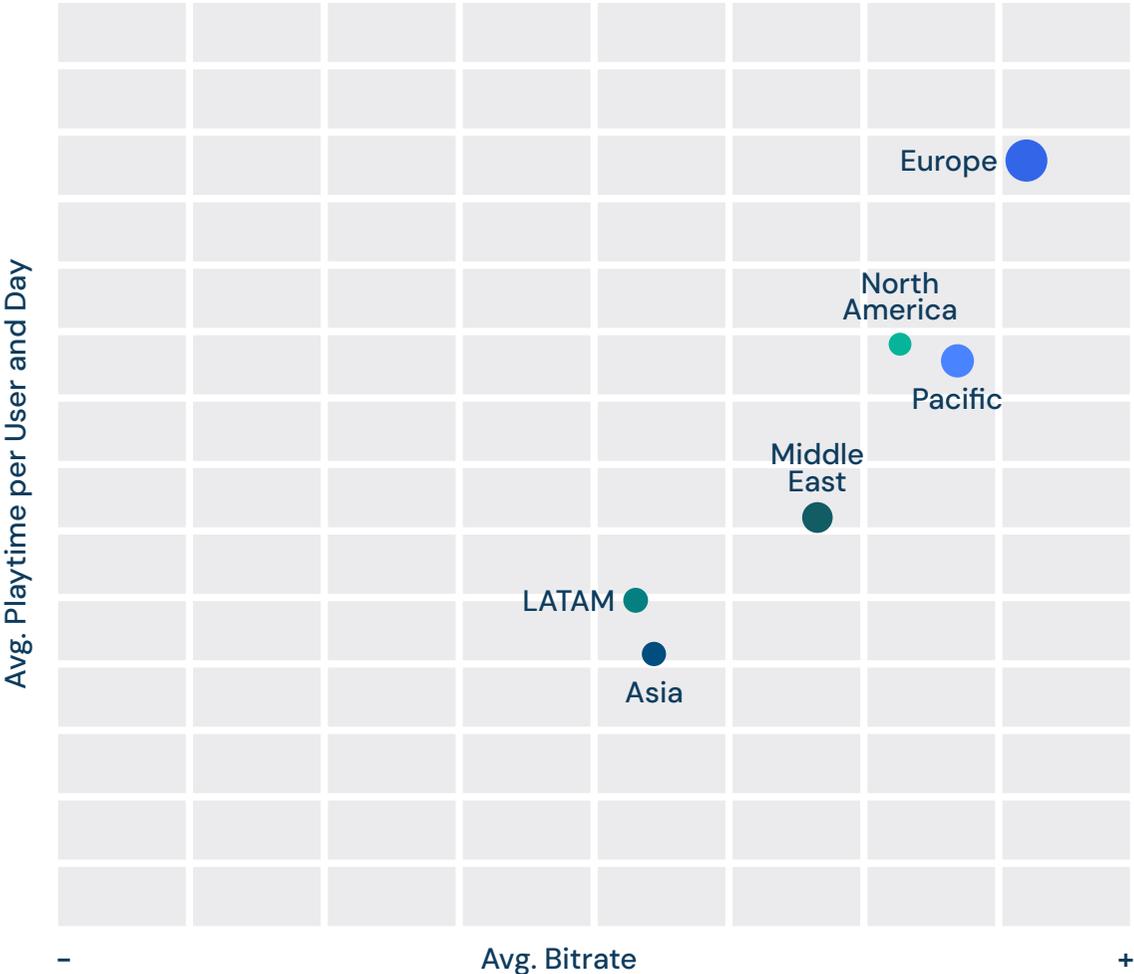


## Europe sees highest Avg Bitrate & Avg Playtime per User

North America and the Pacific regions also has very high quality for Linear TV in both of these KPIs.

Asia and LATAM are lower down the grid, indicating that Linear TV is not as widely consumed or as mature as other regions.

VoD Bitrate vs Avg. Playtime per User





# 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.



# About NPAW

NPAW is the global leader in streaming video intelligence. The NPAW suite of analytics solutions provides advanced visibility and actionable insights on platform performance, app and video player navigation, audience behavior, advertising and content efficiency. NPAW serves more than 200 video services and processes over 100 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

Get in Touch

