

US OTT - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The US OTT Market size is estimated at USD 63.72 billion in 2025, and is expected to reach USD 115.13 billion by 2030, at a CAGR of 12.56% during the forecast period (2025-2030).

The United States is one of the largest OTT markets in the world. The high penetration of smart devices, like smart TVs and smartphones, growing demand for VOD content, and a high rate of per-user payment are some of the major factors driving the country's OTT market. Most of the top global OTT vendors, like Netflix and Amazon, are US-based, providing an advantage to the regional market.

Key Highlights

- The increasing gravitation toward OTT content allows US citizens to get rid of cables, geographic restrictions, and broadcast schedules and fundamentally changes how video is sold, produced, and consumed. Thus, increasing adoption has been attributable to customized genre choices, package flexibility, wider device availability, internet penetration, and lower costs. Netflix and Amazon are the most commonly subscribed OTT platforms in the country.
- With increasing revenue numbers, the surging percentage of viewing time going to OTT video content reflects the streaming growth and is changing the country's entertainment landscape. According to the Uscreen, viewers spend an average of 21 hours per week consuming content in the United States, equivalent to a part-time job streaming digital media in 2024. Notably, 65% of content is consumed via mobile or TV apps rather than web browsers.
- However, some costs for OTT providers also rise along with increased consumption, with services impacted by varying degrees depending on the content delivery network model employed. As the OTT viewing amount increases, so does the OTT provider's delivery cost since CDN services are usually charged for the content delivered.
- Moreover, the hours spent on TV have risen, and people are getting used to watching TV content online. This entails a positive

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growth outlook on a near-term basis. On the vendor front, Viacom is a significant vendor offering a direct-to-consumer (D2C) service on the back of Pluto TV, the free streaming service company in the United States.

US OTT Market Trends

High Penetration of Smart TV Witnesses Significant Growth

- Streaming content in the region has intensified as content owners like Disney go directly to consumers, telcos (AT&T), and OTT-only operators like Amazon, to name a few. Simultaneously, the emergence of 4K for streaming has propelled OTT content growth to be made available across smart TV formats.
- Consistent growth in streaming device usage, increasing internet penetration, and demand for smart TVs have provided lucrative opportunities for media companies to enter the over-the-top (OTT) industry. Several TV makers are introducing innovative smart TVs.
- For instance, in March 2023, Sony Electronics announced the 2023 BRAVIA XR TV Lineup, equipped with Cognitive Processor XR, for a home entertainment experience. The company launched a few new BRAVIA XR lines: X95L and X93L Mini LED, X90L Full Array LED, A95L QD-OLED, and A80L OLED. All models are integrated with technology to create an immersive experience for watching movies, gaming, streaming apps, and others.
- Consumer viewership is transforming in terms of content consumption. There is more growth in online consumption than traditional TV viewership. Major factors driving the market are the flexibility of subscription plans that are available at affordable prices. Consumers have grown their interest in home entertainment by using Smart TVs in their basement areas to create home theater experiences. Additionally, it allows a diversity of content genres, comfort, freedom, and time flexibility, propelling the market's growth.
- Content producers are partnering with Netflix to feature their content exclusively on the platform. For instance, in 2023, Perry and Netflix signed a creative partnership in which Perry contributed to writing, directing, and producing feature films under a multi-year deal. According to Netflix, the number of subscribers paying for streaming platforms in the United States and Canada accounted for 82.66 million in Q1 2024, which shows the popularity of the platform. Many producers are collaborating with Netflix to generate more revenue using integrated capabilities.

SVoD Segment to Hold Significant Market Share

- Subscription video-on-demand (SVoD) is similar to traditional TV packages, allowing users to consume as much content as they desire at a flat monthly rate. Major services include Sky (also its subsidiary Now TV), Amazon Prime Video, Netflix, and Hulu.
- Six major US-based platforms, namely Netflix, Amazon, Disney+, Paramount+, Apple TV+, and HBO, dominate the SVoD landscape. The emergence of SVoD platforms is also helping to attract more consumers. The number of SVoD subscriptions in the United States is projected to grow significantly in the next five years.
- The SVoD segment in the US OTT market is one of the significant segments. By 2025, the country is expected to witness a dozen platforms with more than 5 million paying subscribers, revealing just how ahead the US market is compared with the rest of the world. Growth for established players such as Amazon, Netflix, and Hulu will be affected due to intense competition from younger rivals such as Disney+, Peacock, and the augmented CBS All Access.
- As per the data by Media Play, SVoD contributed USD 52.5 billion in 2023, which is expected to reach USD 54.6 billion by 2029. Major market players are offering cheaper subscription plans to attract more customers. OTT platforms featuring content diversity, flexibility, immersive experiences, and regional content offered are the major drivers that foster the market's growth.

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The US OTT market is witnessing increasing competitive rivalry as more companies enter, leading to the gradual consolidation of the market. The major market players are involved in various strategies to expand their market share, including mergers and acquisitions. Moreover, TV broadcasters are entering the market either by launching their app or investing in another OTT platform. Eventually, in the coming years, most TV cable operators are expected to invest in these business models to establish their presence in the industry.

- April 2024: Roku announced a partnership with Trade Desk, iSpot, and NBCUniversal. This alliance aims to solve the problem faced during connected television space, which includes ease of programmatic buying and measurement. Moreover, in collaboration with NBCUniversal, it will provide 2024 Paris Olympics highlights, featuring all available sports for Olympics coverage on the Roku platform. In partnership with the Trade Desk, it facilitates independent Demand Side Platform (DSP) to gain access to Roku data on Roku inventory, which will allow media buyers to target viewers with more precision.
- March 2024: Walt Disney announced the launch of Hulu on Disney+ in the United States for Disney Bundle subscribers, which brought a variety of genres with integrated content libraries. This allowed subscribers to explore thousands of general entertainment titles, bringing Hulu and Disney+ content together with a personalized experience.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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