

Roku Recap

SUMMER EDITION





The Summer of Streaming

The summer of 2025 was fueled by franchises.

The season's single biggest hit – *Love Island USA* – conquered living rooms in its seventh season. And familiar IP showed up consistently across the most-searched and most-streamed TV and movies titles.

In this inaugural Summer edition of the Roku Recap, we draw on Roku's insights to show how *Love Island USA* rose to the top of viewer's streaming watchlists. We also explore the movies, sports and audience insights that defined this sun-drenched season.

Why are we introducing Roku Recap now? According to Nielsen, streaming officially surpassed linear TV usage, and Roku alone captured more watch time than all of broadcast combined. For advertisers and creators, the streaming opportunity has never been bigger.

With each edition, we'll dig into Roku's vast data about key events and topics that shaped streaming during the preceding three months. Let's dive in.

SPOTLIGHT

Love Island USA is Roku's show of the summer 2025.

Driven by social-media buzz and meme-able moments, *Love Island USA* season 7 delivered a summer mega-hit for Peacock. Over a sustained 7-week period, Peacock grew both viewership and new subscribers — especially among new viewers. Amazingly, these gains were on par with the streaming service's gains during the 2024 Summer Olympics. In a world where U.S. households with **125 million people** see the Roku home screen every day, any franchise has the potential to deliver a tentpole moment.



Love Island USA was the **#1 searched show** on Roku in both June and July.



Average daily Roku searches in the US for this season of *Love Island USA* **grew +59%** from week 1 to the final week.



87% of Roku searches for *Love Island USA* came from Roku users who had not searched for the show before.

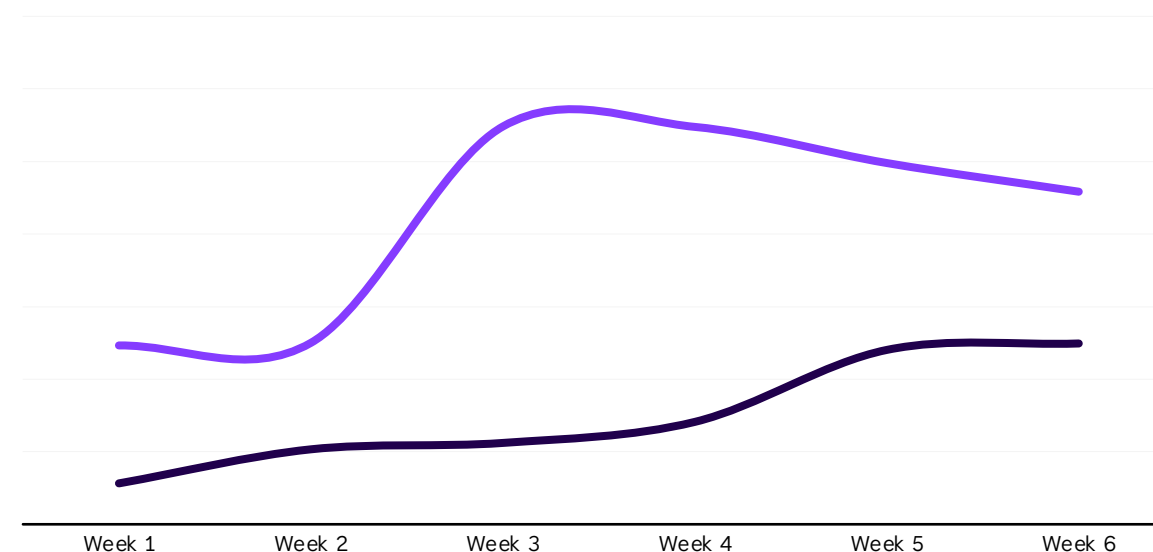


Love Island USA led to a steady increase in Peacock subscriptions that was more sustained than the spikes from even major events like the Olympics.¹

Love Island Searches on Roku

2024

2025



TOP TRENDING TV SEARCHES ²

1



2



3



4



5



6



7



8



9



10



Endless summer, endless reboots.

Roku search data reveals that *Love Island USA* is not the only long-running series to capture fresh interest this season. Many of the summer's 10 buzziest shows resurrected long-running series (literally — see *Dexter: Resurrection*). In the case of *South Park*, ballooning attention (in its 27th season!) was fueled by press pickup and social chatter about its acerbic take on current politics.

Key Takeaway

By building a massive social presence, Peacock grew *Love Island USA*'s viewership over past seasons and throughout the summer. While not obviously a cultural touchstone at the start of the season, it drove significant subscribers (and new viewers) to the streaming service, and kept their attention all summer long, showing that even casual viewing can captivate audiences multiple times a week for months at a time.



Summer is heaven for moviegoers.

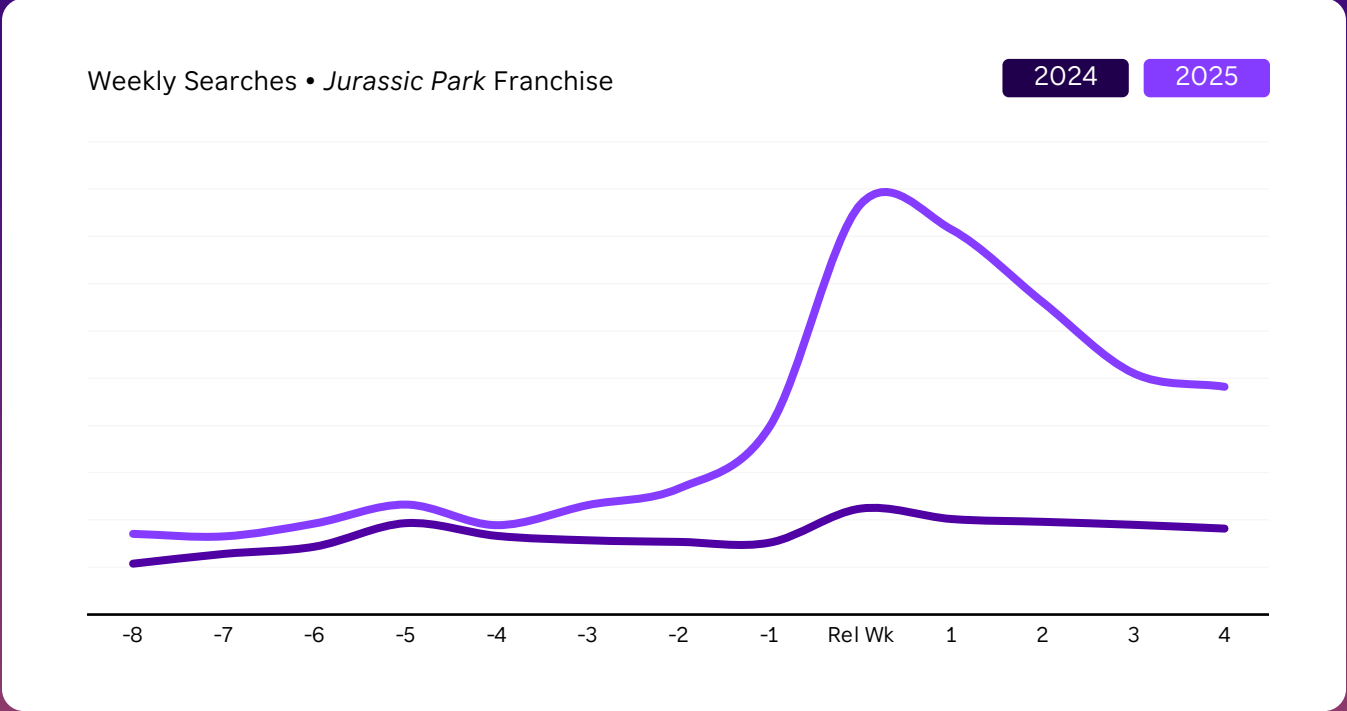
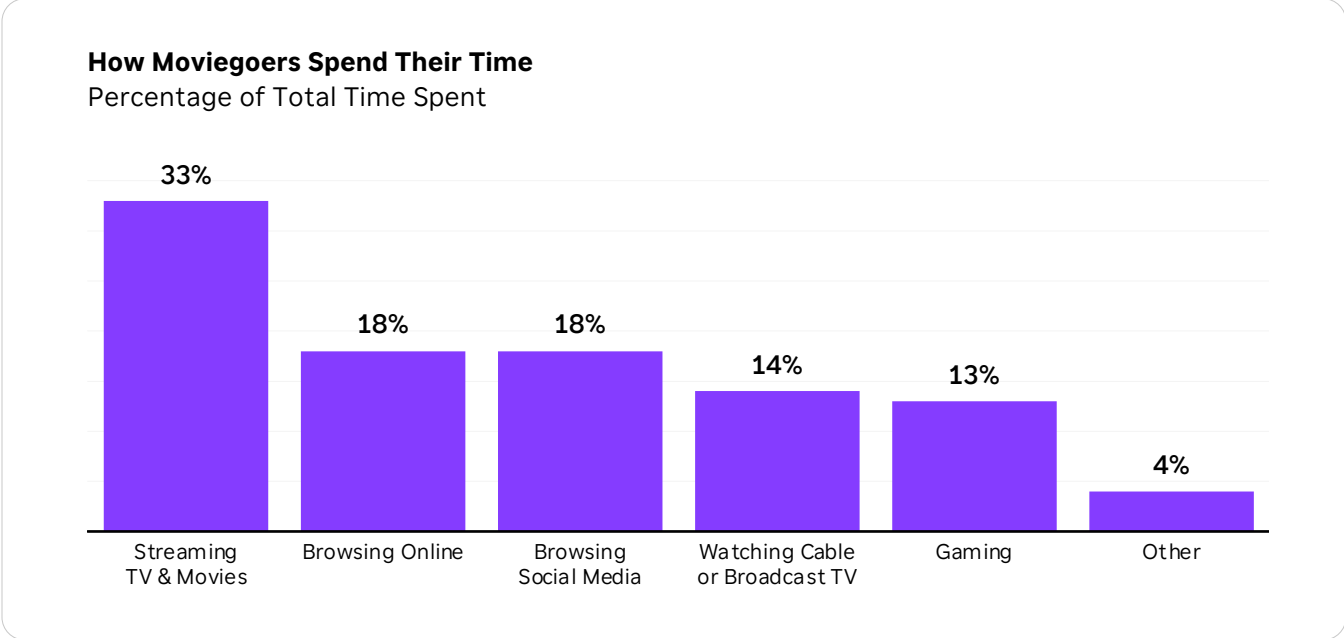
Every Recap, we'll deep-dive on a cohort of Roku viewers to reveal their viewing and purchase behaviors. This summer, let's examine moviegoers. Summer is the ideal time to catch a flick in an air-conditioned theater, as the mercury climbs and many studios schedule their blockbuster releases. How does the critical theater buff audience bring the theatrical experience to the biggest screen in their homes? Moviegoers are defined as having seen 2+ movies in a theater in the past six months and are likely to attend on opening weekend.

72%

of moviegoers say they are more likely to pay attention to trailers on their TV than on social media.

Moviegoers are 1.8x

more likely to buy a ticket after seeing ads/trailers on a video streaming platform.



Searches on Roku increase for franchises with a new release.

Across four beloved franchises: *Jurassic Park*, *Superman*, *How to Train Your Dragon*, and *Smurfs*, weekly **Roku searches increased 3-5x** in the month leading up to the release of the new film.

Interest remains strong well beyond the box office open.

In the weeks following its 2025 release, weekly searches for the *Jurassic Park* franchise were **2.5-4x higher** than in the corresponding weeks in 2024. And even three weeks post release, searches were still **1.5-2x higher** than in the week before release.

TOP TRENDING MOVIE SEARCHES³

1



2



3



4



5



Homes that searched for *A Minecraft Movie* were over **4x more likely** to also search for other movies starring Jack Black or Jason Momoa compared to all Roku searchers.




Key Takeaway

A box office hit can drive engagement with related licensed and library content well beyond its theatrical run. Even films 30+ years old can gain renewed interest as viewers revisit the canon before heading to the theater.

During the summer sports lull, NBA and MLB offer a ray of sunshine.

Sports viewing, especially for the NFL and MLB, is so fragmented that the average fan needs seven different subscriptions to stay current with their favorite teams⁴. Below are the biggest moments from each major in-season sport, drawing in part on data from Roku's Sports Zones which provide fans with a central hub to access the games they care about.

Top Game of the Summer⁵ • NBA Finals Game 7



Top Sports Moments Based on Zone Engagement



NBA Finals Game 7

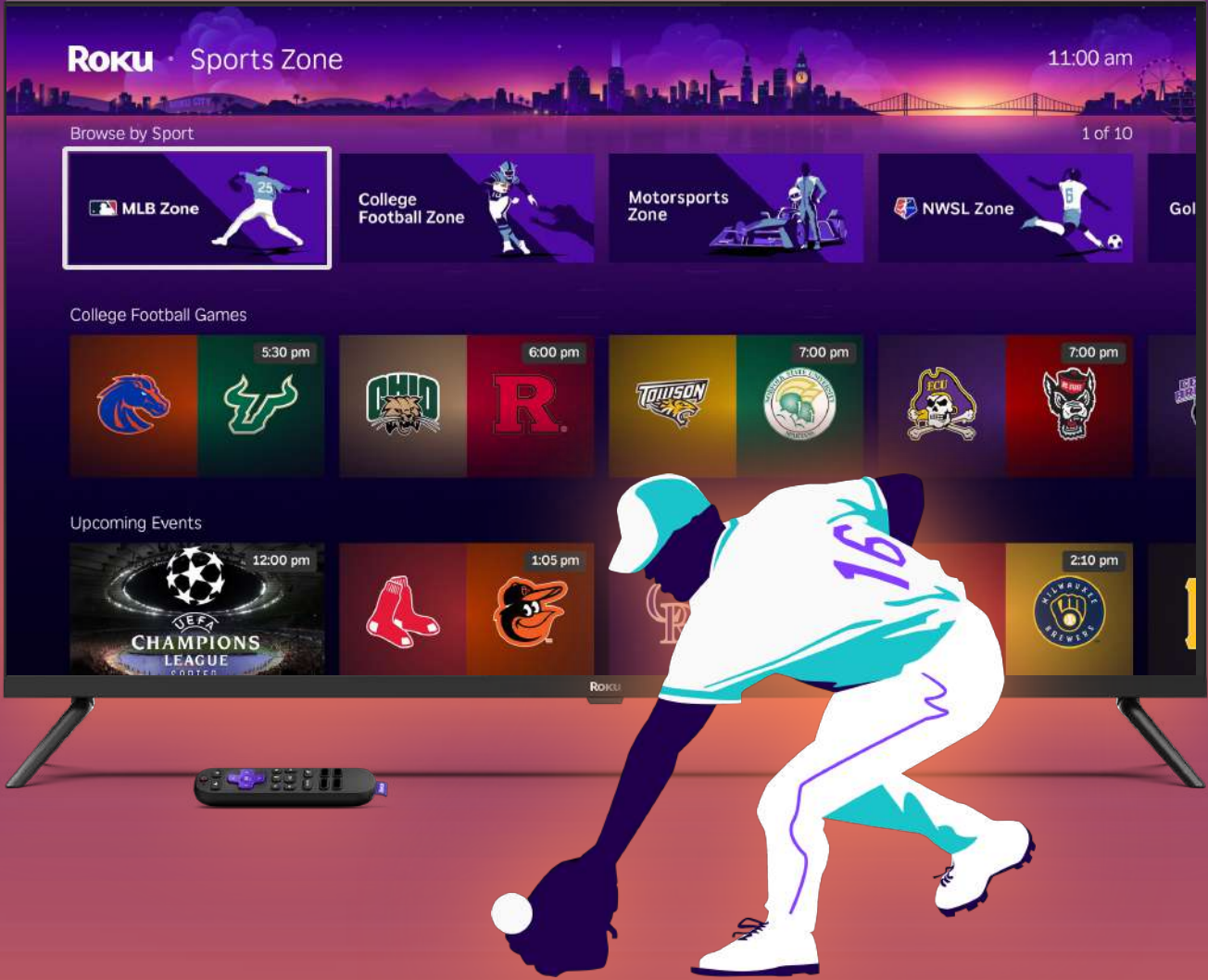


2025 MLB All-Star Game



CONCACAF Gold Cup Semi-Final

During the NBA Finals, **1 in 4 visits** to sports zones were to NBA Zone.

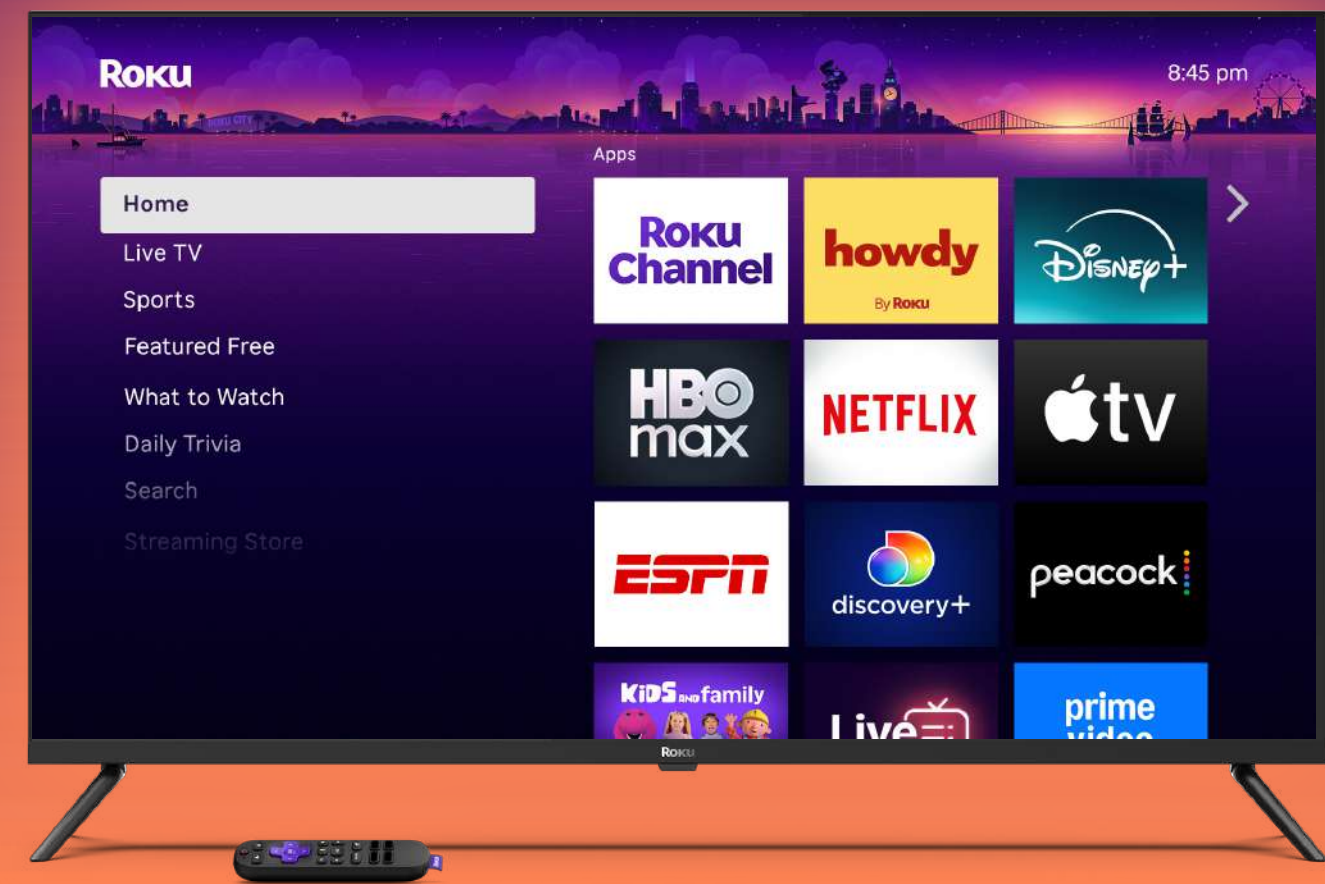


Key Takeaway

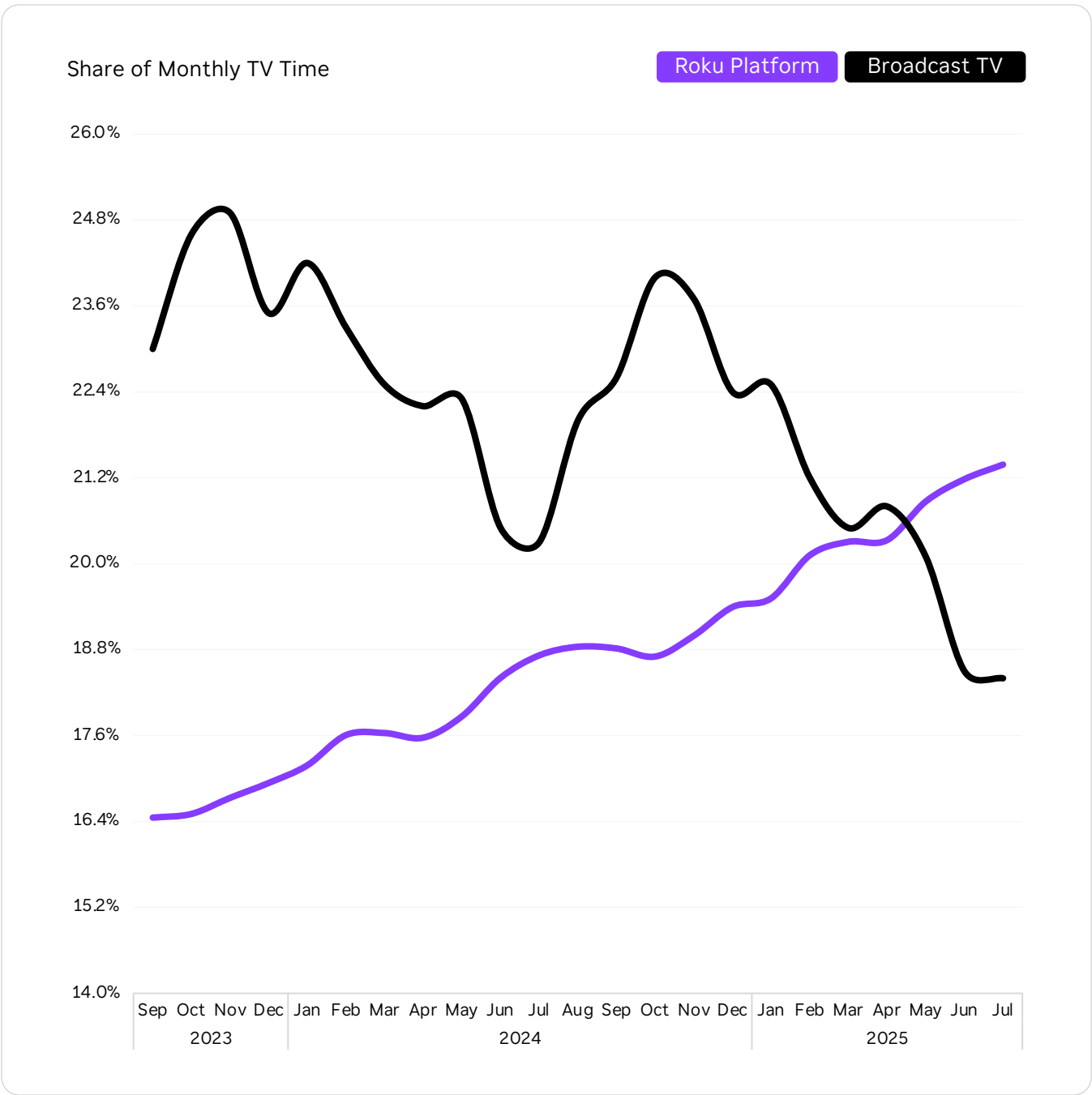
Unfortunately for fans, fragmentation of sports viewing across MLB, NFL, NBA and other leagues will probably get worse before it gets better. But the situation is not hopeless. As we gear up for the NFL kickoff this fall, the Roku Experience offers a reliable way to reach sports fans at scale.

Streaming on Roku outshines broadcast TV.

Summer means more free time, and US viewers increasingly spent that time with streaming. In fact, Summer 2025 will go down as the season streaming usage surpassed the combined viewership of cable and broadcast TV, according to Nielsen’s closely watched Gauge report. At Roku, we’ve notched a milestone of our own: Roku OS now makes up **21.4% of TV time in the US** — more than all broadcast TV watch time.⁶

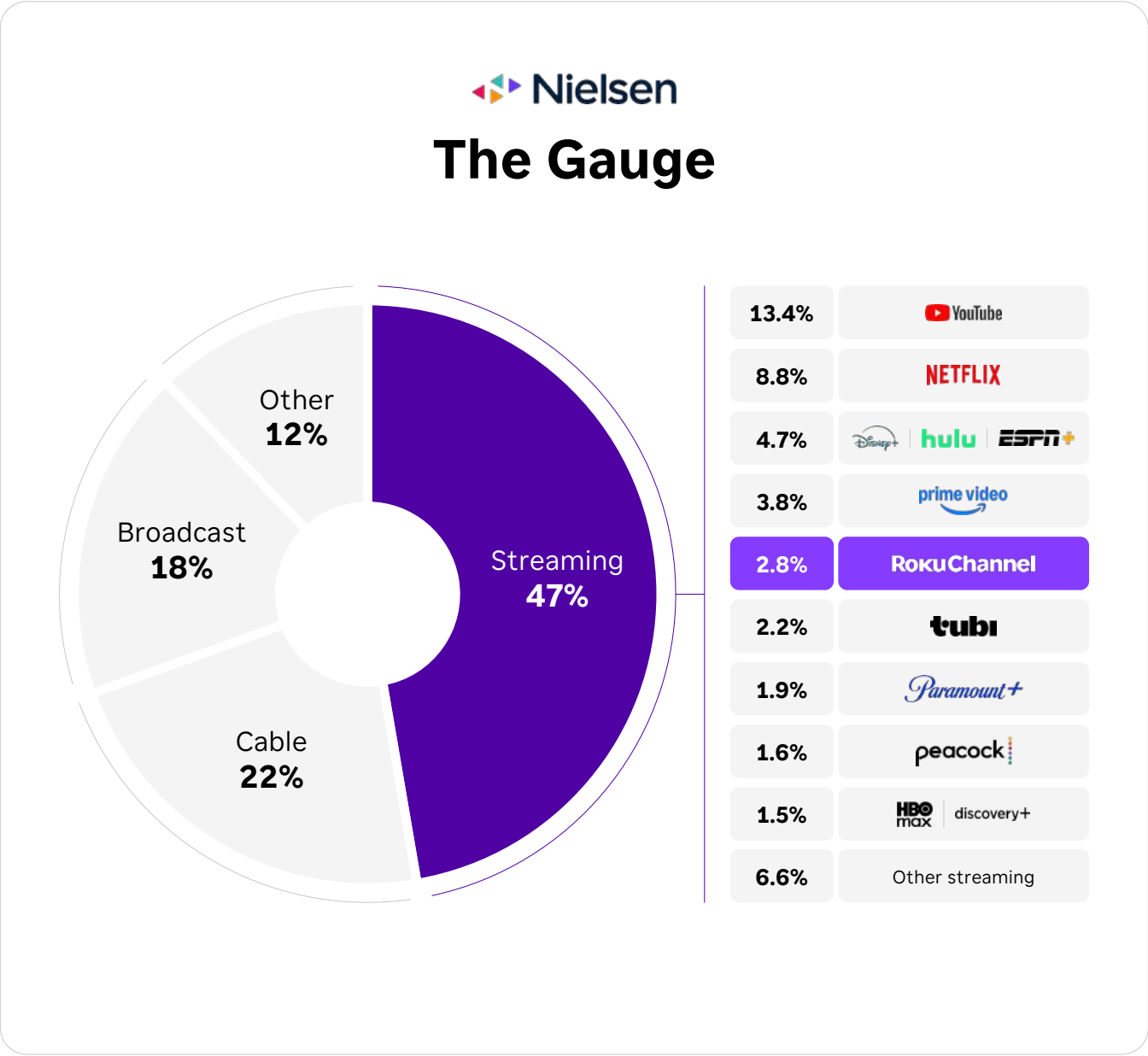


With this tipping point, streaming has become the new primetime, complete with appointment viewing, bankable reach and measurable impact. And in a world where streaming rules TV, advertisers have access to much larger data sets, helping them to understand streaming attention.



Drilling down a little, we see that The Roku Channel has nearly tripled its share of total TV time in the past two years — **from 1.0% of TV time in July 2023 to 2.8% in July 2025**. It has consistently been the fastest-growing streaming service in the Nielsen Gauge over the past year.

Nielsen’s Total TV and Streaming Snapshot
Video Streaming Distribution • P2+ • July 2025 • Total Day



Key Takeaway

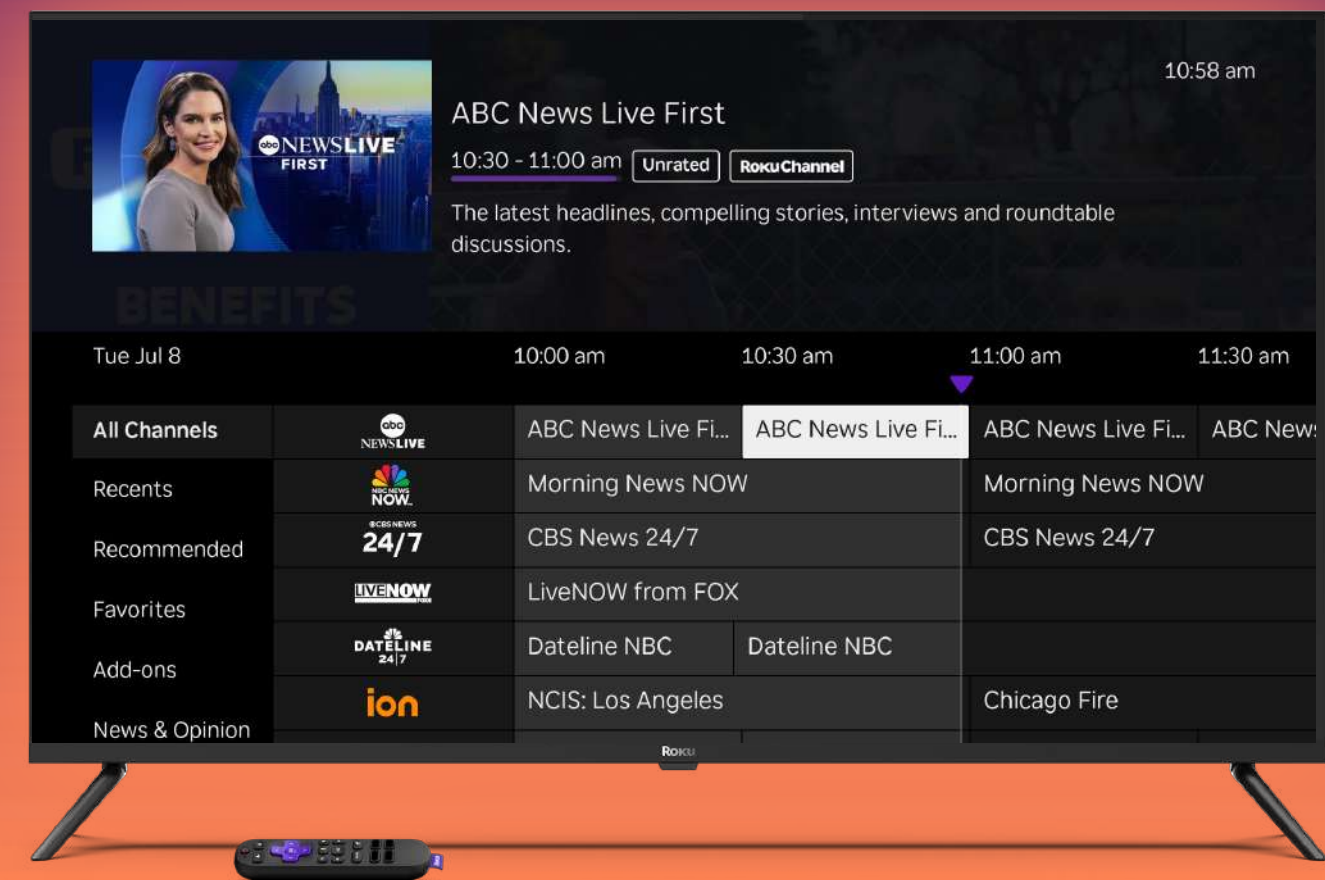
We’re in a new era of streaming, defined by massive audience reach and powerful insights. With more usage than all broadcast TV combined, Roku helps our advertisers find their customers at scale.

HOT BUTTON

FAST is the new cable.

When we needed to escape the heat, a growing number of us passed our indoor time watching free ad-supported TV (FAST). And FAST content has become more premium than ever.

The FAST experience closely resembles cable, with a guide of channels playing content on a set schedule with regular ad-breaks. People often think about streaming as an on-demand environment, but on Roku, FAST is gaining steam.



FAST viewers watch similarly to cable – about 4 different channels and 4 total hours per day



Hourly FAST viewership ebbs and flows like cable, rising during the day and peaking at primetime

Top Ranked FAST Genres



Key Takeaway

With the decline of cable viewership, FAST is now filling that space on streaming. Big media companies are acquiring sports rights and building new streaming services. These investments have sped up audience migration to ad-supported streaming — especially among affluent and coastal viewers — as more quality content becomes available.



Summer of Love

Summer 2025 represented a high-water mark for streaming and Roku, as streaming officially overtook linear and time spent with the Roku platform surpassed the entirety of broadcast attention.

Love Island's breakout success proved that audiences can still rally en masse around a single entertainment franchise, giving marketers new opportunities to connect at scale. As fall approaches, we look forward to bringing you more Recaps featuring exclusive Roku insights about trending entertainment and new audience behaviors that have turned attention into action by meeting viewers where they already are: on Roku.

Roku

Recap

SUMMER EDITION