

**R** **T** **L**

# The largest European online survey on CTV

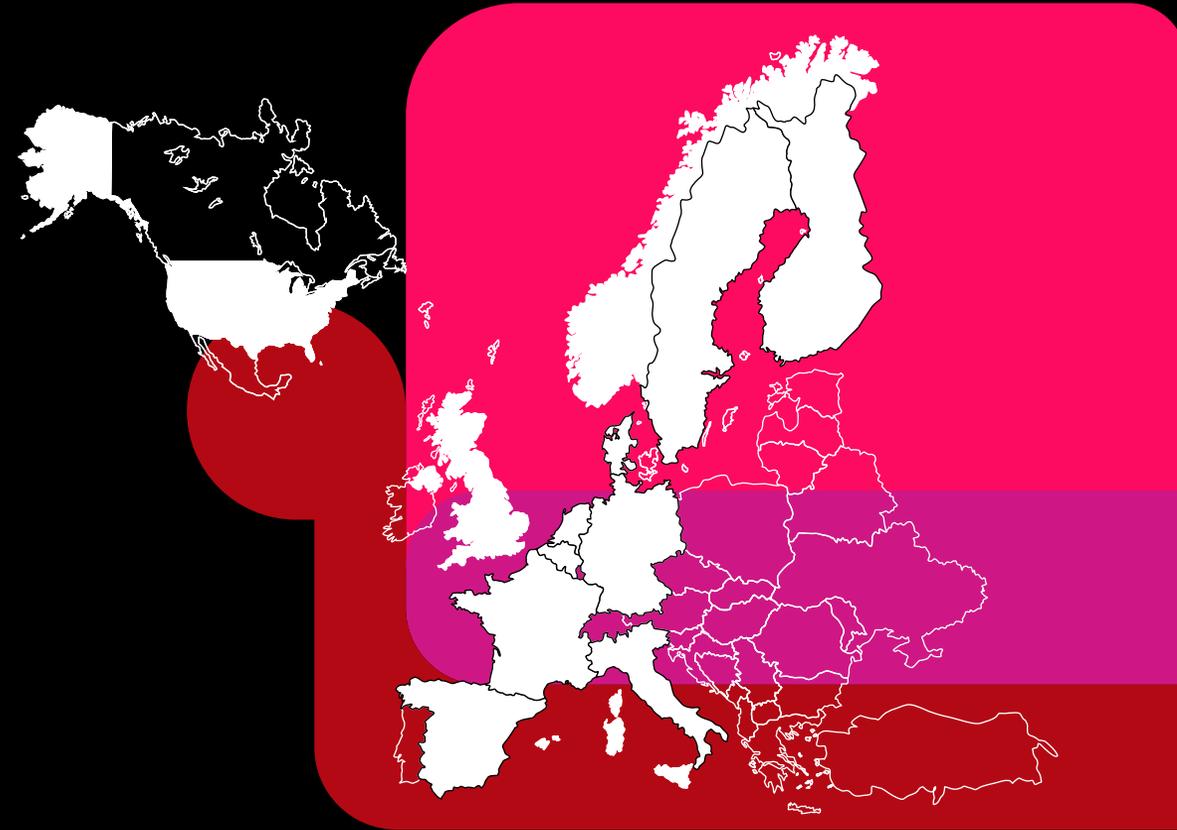
**12**  
countries

Belgium **NEW**  
Denmark  
Finland  
France  
Germany  
Italy  
The Netherlands  
Norway  
Spain  
Sweden  
United Kingdom  
US **NEW**

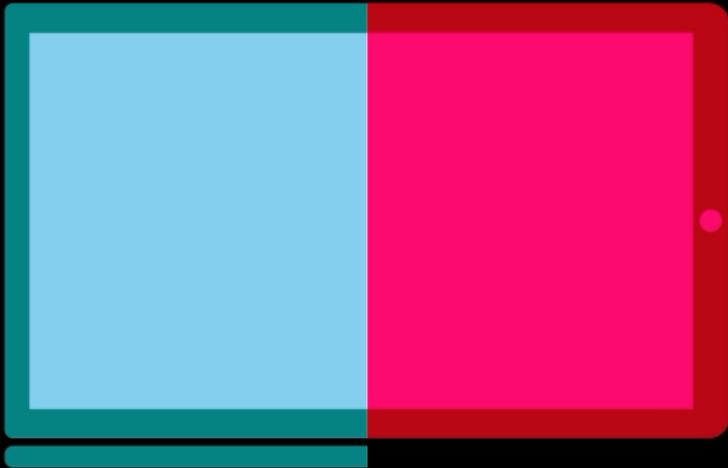
Wave 3, February 2024

**10,000+**  
respondents aged 18-64

**28**  
questions



**A scattered  
landscape  
of streaming  
usage on CTV**

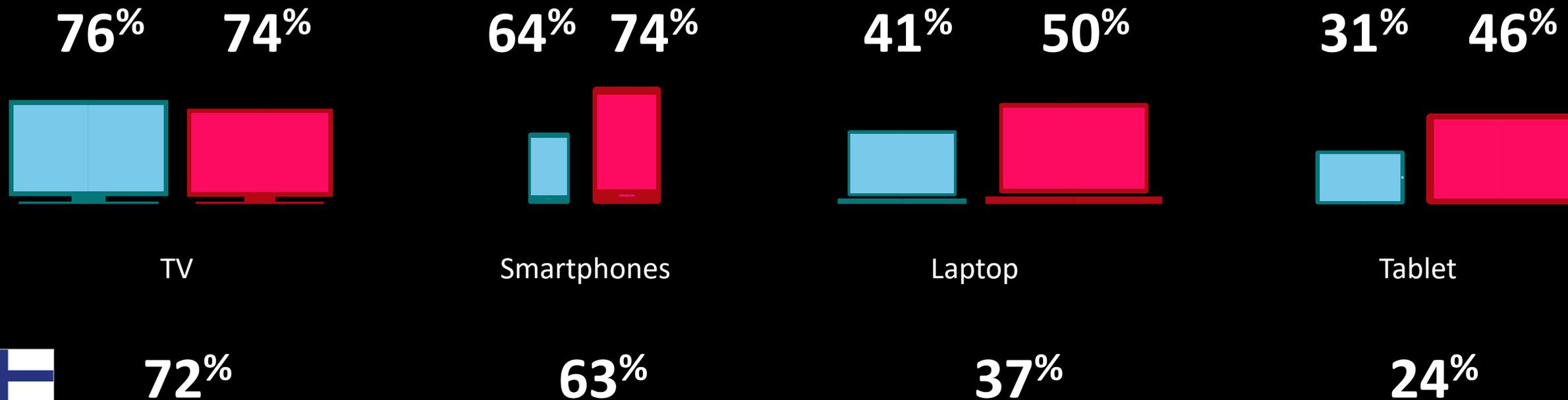


**Of course  
we want it all!**

# We want to have multiple screens to watch video content

Which devices are used every day or almost everyday to watch video content?

■ EU 11 ■ US



# We all want a smart TV set

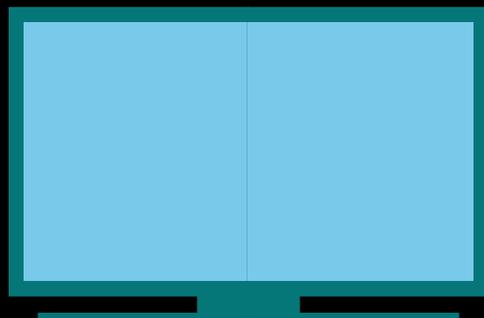
Do you own a smart TV?

In Europe

78%

+5pts  
vs 2023

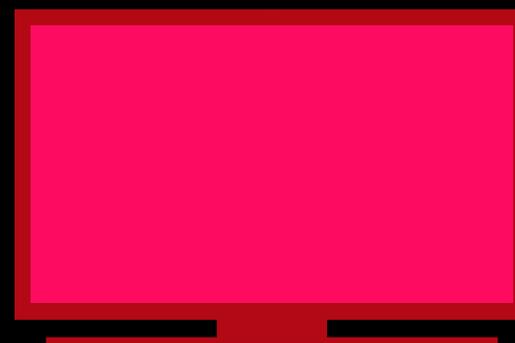
own a smart TV set



76%

81%

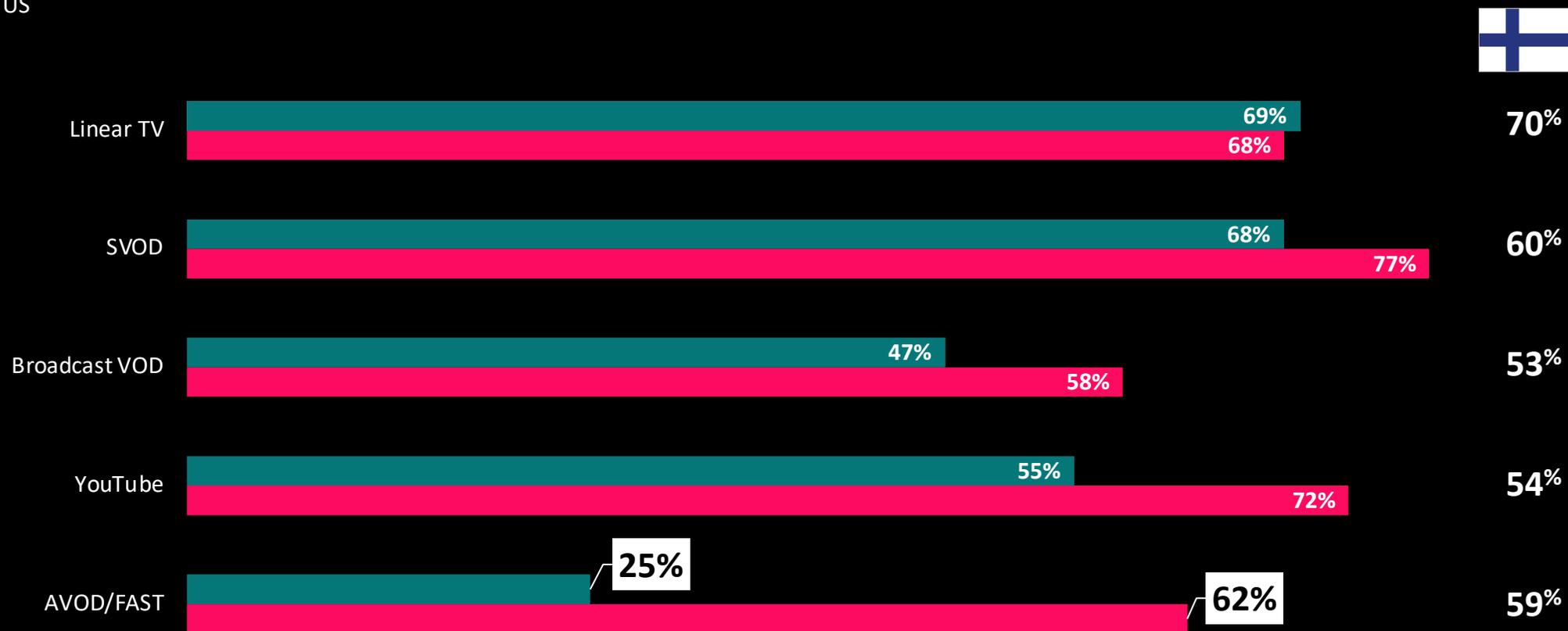
in the US



# We want to be able to access to all platforms on our TV set

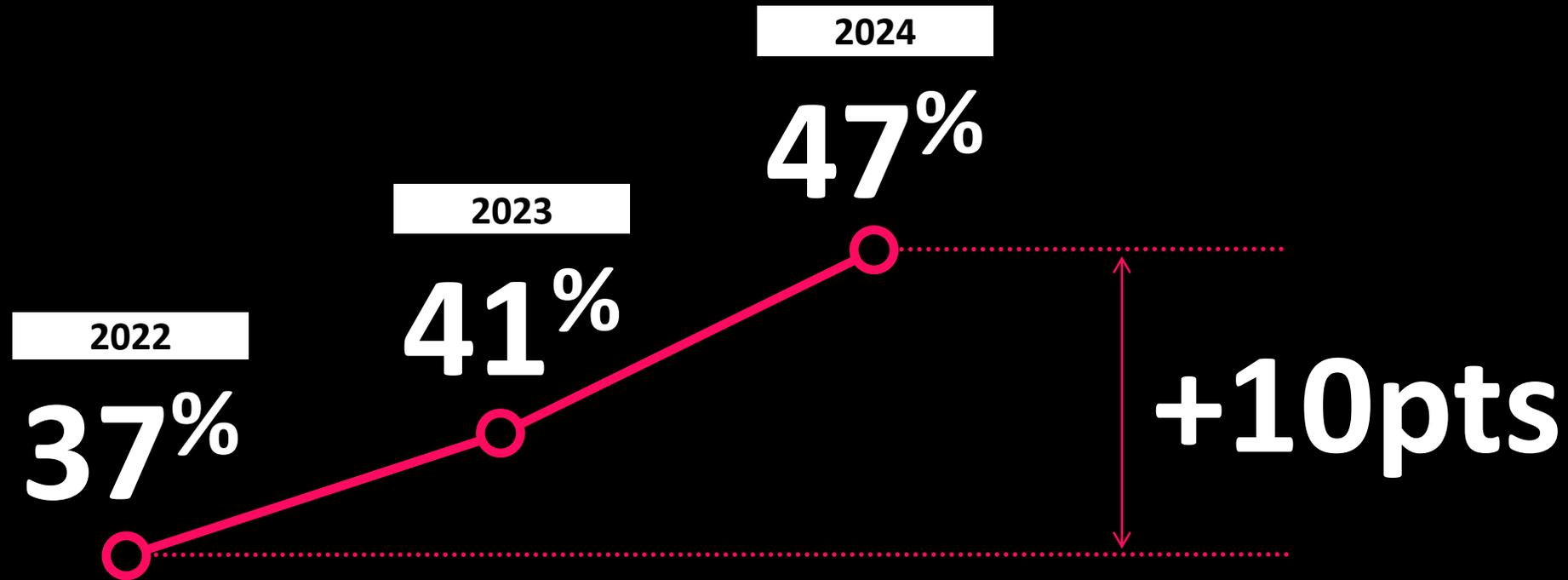
Which type of video content do you watch at least one to three times a week on your TV set?

■ EU 11 ■ US



# What are the drivers behind the BVOD growth in Europe?

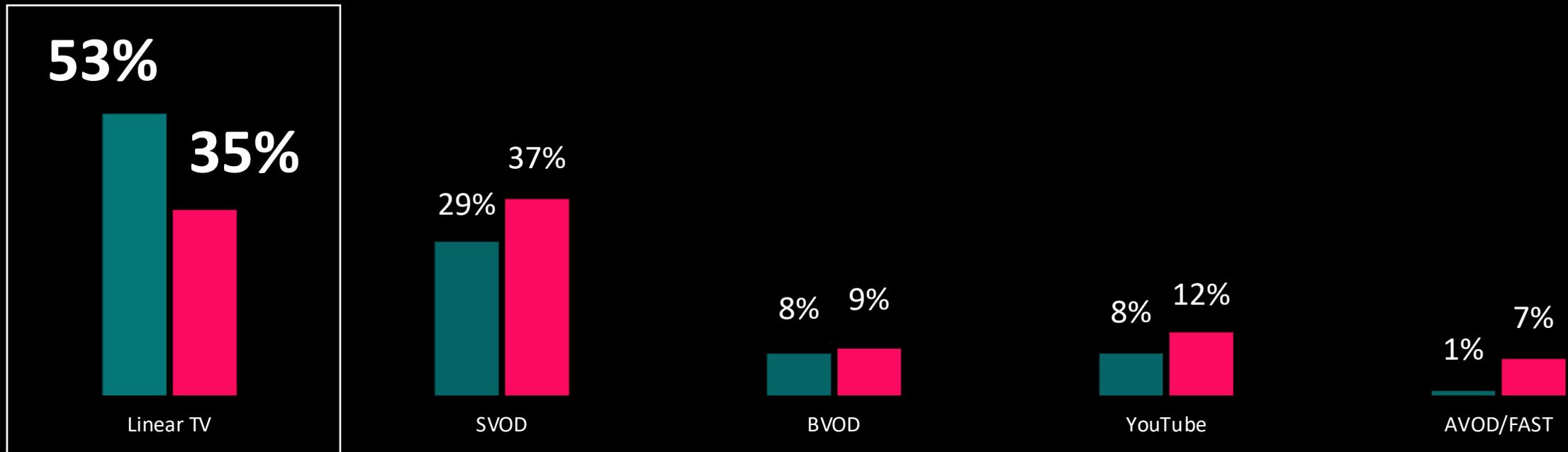
Watching BVOD at least one to three times a week on your TV set



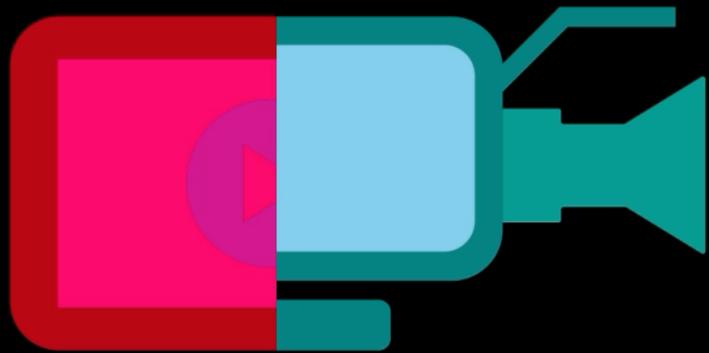
# Linear TV is the first choice for European when turning the TV set on

What is your first destination when you turn your TV on?

■ EU 11 ■ US



55%

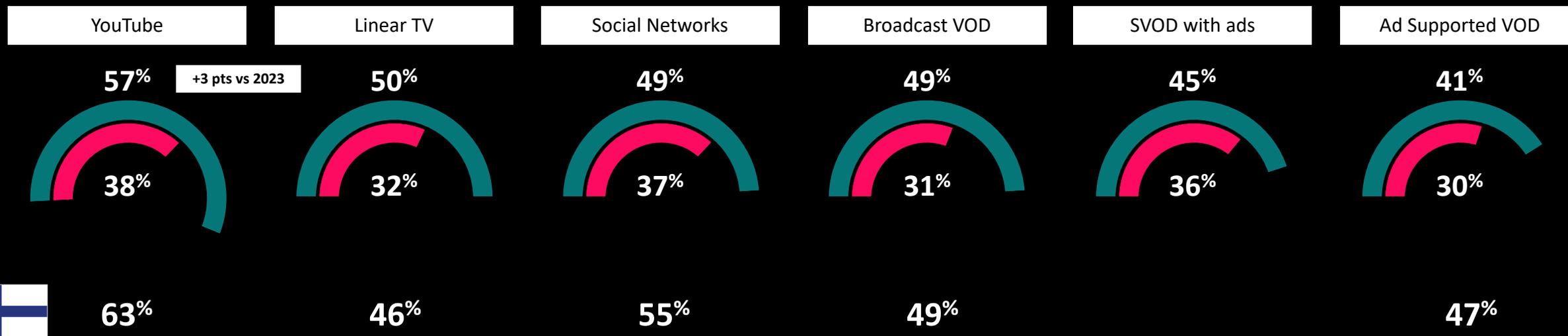


**How do you want it?  
With or without ads?**

# Ad tolerance is much higher in the US

To what extent are you annoyed by ads on each platform?  
 Respondents who rated ad annoyance at 4 or 5 on a 5 point scale

■ EU 11 ■ US



# Do we want ads or not? Confusion!

EU 11 **29%**

US **54%**

Prefer to pay to see programmes  
without being cut off by commercials

**and**

are not bothered by ads if it gives access  
to premium programmes for free or at a lower cost

# Higher appeal in the US for Netflix & Disney+ with ads

Willing to subscribe for the Netflix or Disney+ offer with advertising

■ EU 5 ■ US

## NETFLIX



Yes



Yes, definitely

9%

20%

10%

21%



**The paradox  
of choice**

# Viewers are overwhelmed by choice



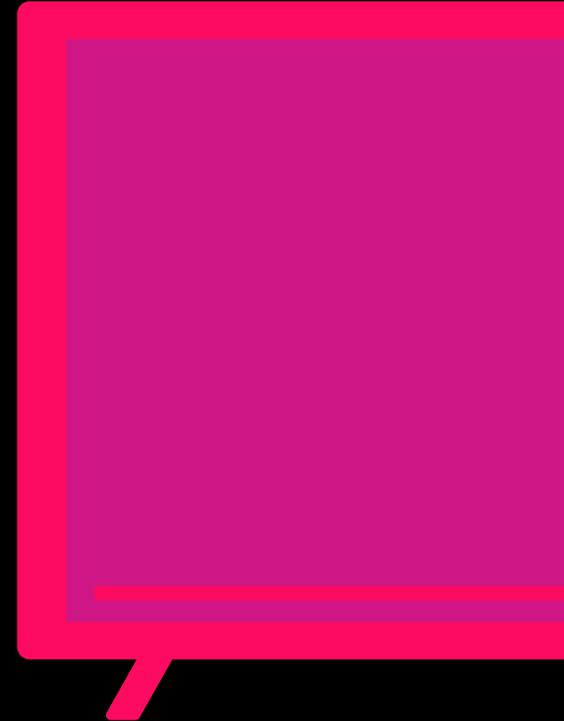
I sometimes feel lost in front of the amount of video content available, and I don't know what to choose”

60%

agree in EU 11

64%

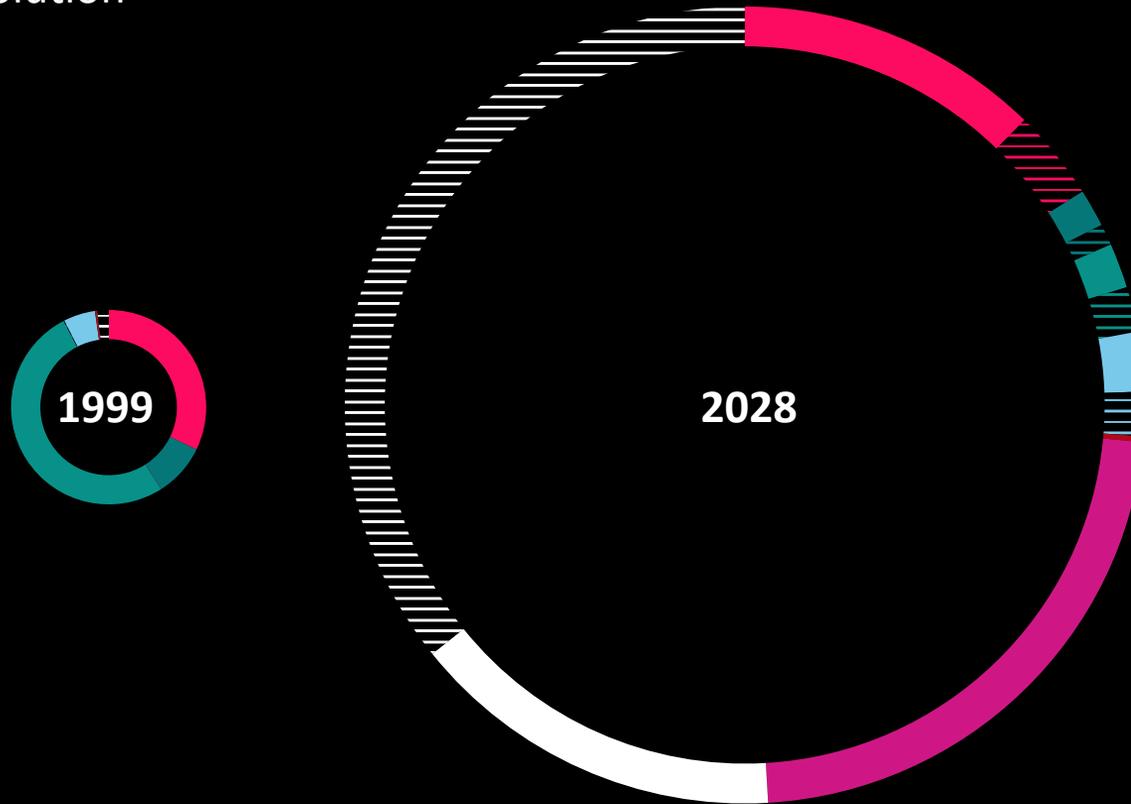
in the US (29% strongly)



# Growth and fragmentation define the transformation of the advertising market

1999-2028 ad spend evolution

- Video
- ▬ Online video
- Audio
- ▬ Digital audio
- Print
- ▬ Digital print
- Outdoor
- ▬ Digital outdoor
- Cinema
- Search
- Retail media
- ▬ Other digital



1999-2028:

**x4**

Global ad spend

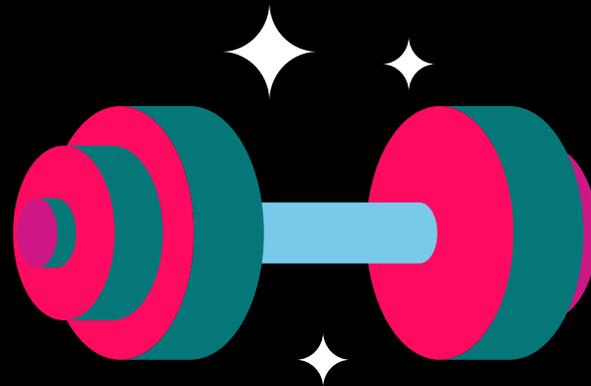
**x2**

Global Total Video spend

# Guidance of choice



**Simplicity**

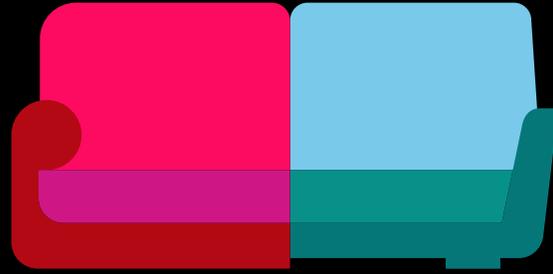


**Strong brands**



**Trust**

The New Life  
of the **Living  
Room**



**Join our New Life of the  
Living Room live stream!**

**Tuesday, April 23rd at 10 am (GMT)**



**Register now!**

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