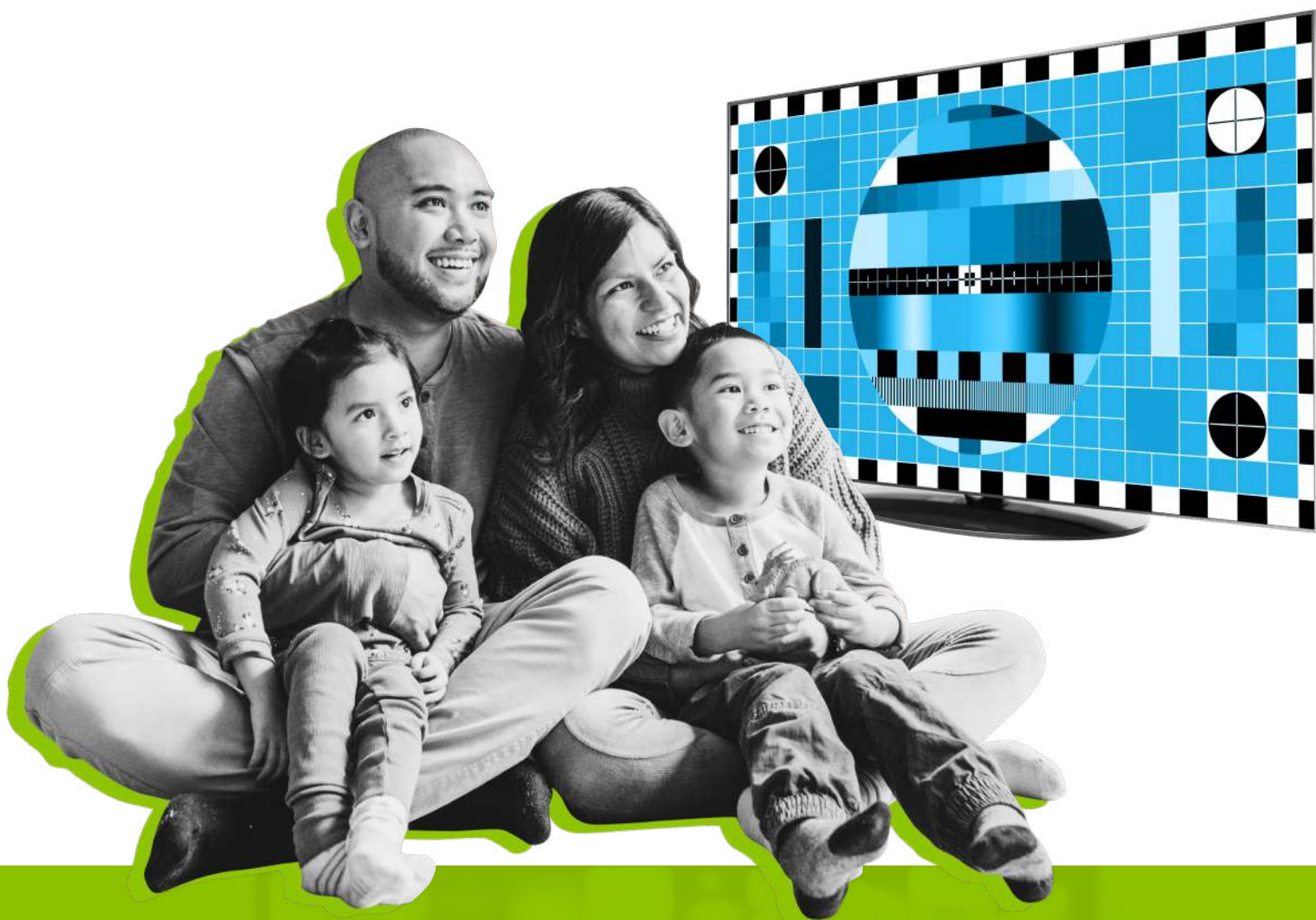


SPOTX



CTV IS FOR EVERYONE

AN IN-DEPTH LOOK AT EUROPEAN CONNECTED TV VIEWERSHIP

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INTRODUCTION

WHAT IS CONNECTED TV AND WHO WATCHES IT?

Connected television (CTV) has been considered the new kid on the block since its emergence as a complement to satellite, cable, and IPTV. It is a way for audiences to watch streamed video on large screens via an internet connection with increased choice and more flexibility.

Consumers across Europe have continued to join the movement of accessing television through streaming services and CTV has now progressed beyond its status as a complement to traditional services and is now considered a replacement. It is not a fad or short-lived tech trend, and it is not just for digital natives or members of the millennial generation – **CTV is for everyone.**

Viewership figures support this concept. Multiple sources indicate that the CTV audience size has steadily increased over the past few years and that the proliferation of smart TVs, in particular, has accelerated access to CTV content in homes across Europe. We have seen this trend reach maturation in our own platform, with investment in CTV significantly increasing as more advertisers recognise the potential to reach a growing audience.

That is why now, as we enter the connected decade, we are taking a closer look at the state of CTV viewership behaviour across Europe's five largest markets.

We hope this report helps you better understand the specific CTV habits of Europeans and, in turn, provides unique insights to inform your business strategy in the future.



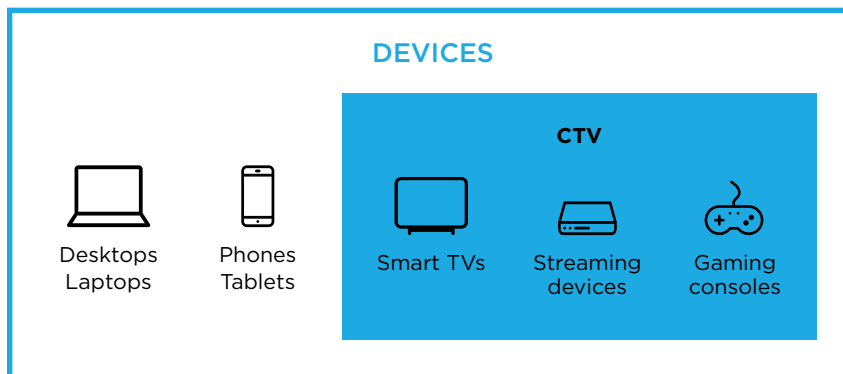
Léon Siotis

President, EMEA, SpotX

HOW WE DEFINE CTV

Before we progress any further, we want to avoid any confusion by clearly defining the term “CTV.” *CTV* is a television set connected to the internet through the built-in capabilities of a smart TV, or through a streaming device or gaming console, that enables the viewing of video content streamed on a large screen.

OVER THE TOP (OTT) VS. CTV



iab.
TECH LAB

<https://iabtechlab.com/ctv-ott>

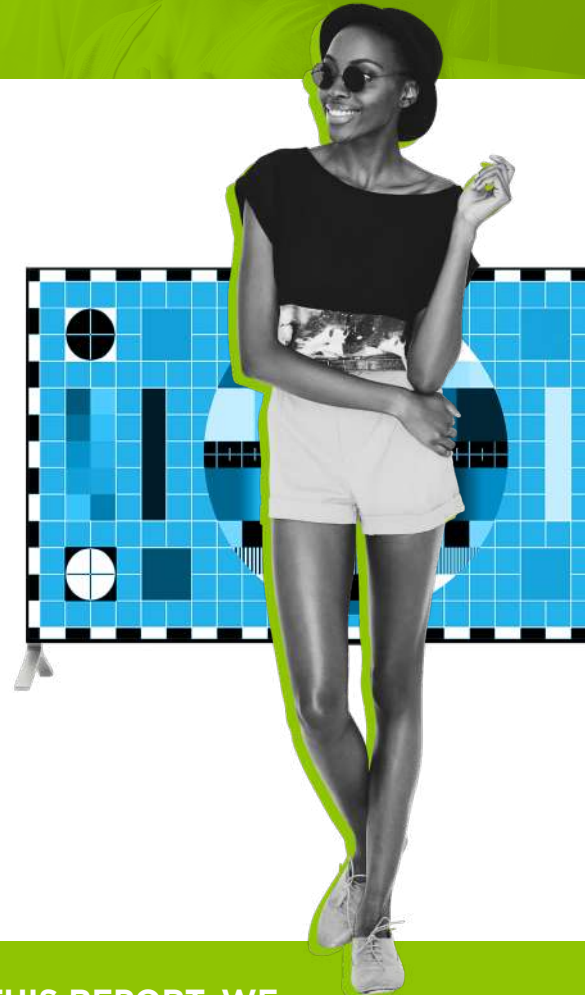
WHAT DO WE REALLY KNOW ABOUT EUROPEAN CTV VIEWERS?

We know that consumers across the major European markets are rapidly adopting CTV and that media owners are rushing to fuel that enthusiasm with quality, localised content. However, the size of the market is not easily identifiable and there is a distinct lack of consumer-focused research that highlights what consumption behaviour looks like.

That is what we will cover in this report. SpotX has conducted broadscale, consumer-based research to identify the characteristics of CTV viewers and contextualise the audience. The findings aim to help advertisers reach consumers more effectively through this efficient and engaging medium.

IN THIS REPORT, WE UNCOVER THE ANSWERS TO THE FOLLOWING QUESTIONS:

- Who are CTV viewers?
- What attracts viewers to CTV?
- When are they watching?
- How often do they watch?
- How tolerant of ads are they?
- How do they access content?
- Who do they watch with?
- What do they watch?





METHODOLOGY

Statista conducted a quantitative survey through an online access panel (computer-assisted web interviews, or CAWI). The questionnaire was mobile enabled. The target group was CTV consumers aged 18 years and older streaming on-demand digital content or live TV at least once a month via a smart TV, a streaming box or stick, or a gaming console that is connected to a stationary TV device.

Quota sampling per country was used according to gender, age, and region. The total sample size was n=7,504 (respondents in: UK n=1,501, France n=1,503, Germany n=1,500, Italy n=1,500, and Spain n=1,500).

The data has not been weighted.

The survey was conducted between March 30 and April 22, 2020.

COVID-19 ACKNOWLEDGMENT

The effects of the coronavirus pandemic have amplified and accelerated the transition to CTV as a way for many Europeans to access televised content, particularly free-to-watch, ad-supported content.

- Streaming hours are up – the time spent by existing CTV users has increased and is fueling the discovery of ad-supported content ([Roku](#))
- User counts have increased – new users have migrated towards CTV as households have explored new ways to access televised content through smart TVs and streaming devices ([VIZIO](#))

10 KEY TAKEAWAYS

1. SCALE EXISTS AND IT'S HERE TO STAY

In Europe's biggest markets, approximately 40% of all internet-enabled and TV households now own a smart TV. When we add streaming devices and gaming consoles, we see a 50% reach in CTV viewership – representing 61.5 million households.

- Our survey found that 45% of internet-enabled and TV households watch CTV on a regular basis.

2. CTV BRIDGES THE GENERATIONAL DIVIDE

CTV viewership appeals to all ages and lifestyles across all of the Big 5 European markets. We found that contrary to popular belief, Generation X represents the largest generational segment, representing 43% of all CTV viewers (more than Generation Z and millennials, which represent a combined 32%).

- Households in Italy that regularly stream are the most likely to have children (50%), whereas those in Germany (32%) and the UK (36%) were least likely to have kids in the household.
- The median age of CTV viewership across Europe's Big 5 markets is 43.

3. ONCE AUDIENCES WATCH, THEY CAN'T STOP

Half of all CTV viewers watch on a daily basis. Almost all watch weekly. CTV viewership is not an occasional activity; it happens regularly and, for many CTV viewers (56%), it is the primary way they watch television.

- Spanish viewers watch most regularly, with 65% of viewers tuning in daily. German viewers tend to concentrate their viewership on certain days of the week.
- Saturday is the most popular streaming day and Saturday evening is when streaming is at its highest across all markets.
- The majority of CTV viewers in the UK (60%) use CTV as their primary way of watching television.
- Millennials are the most likely to spend the most amount of time streaming CTV content – especially in the UK and Spain, where three-quarters of their time spent watching television is through CTV.

4. CONVENIENCE BEATS COST

Flexibility and variety are the top reasons people watch CTV. Cost, on the other hand, is not a significant consideration, with only 6% of European respondents ranking it as the most important reason that they stream. CTV's appeal is that it offers more variety and control to the viewer – often through ad-supported content – than traditional forms of television.

5. CTV BUILDS A NATURAL HOME FOR ADVERTISING

CTV offers an abundance of free-to-view content. The majority of CTV viewers (69%) say they watch ad-supported content and more than half (58%) say that they prefer to watch free ad-supported programming versus paying for an ad-free experience.

- Only 22% of respondents say that seeing ads within programming bothers them.
- Generally speaking, the fewer subscriptions a household owns, the more likely that household is to watch ad-supported programming.

6. WHEN IT COMES TO SUBSCRIPTIONS, THREE'S A CROWD

We found that across all the major European markets, households owned an average of one to two subscriptions. CTV viewers are highly unlikely to increase their paid subscriptions despite viewing hours trending upwards. In fact, 3 in 4 respondents say that they do not plan to change the number of subscription services they pay for or how much they spent on subscription services in the next 12 months.

7. THE MORE THE MERRIER

CTV viewership is a shared experience. Most streamers watch with a partner (61%) or with children and family members (32%). Only 24% say they usually watch by themselves.

- The survey results reflect what we see in the US, where we are forecasting co-viewing rates of 2-3x.

8. CTV IS IN THE MOMENT, NOT JUST FOR CATCHING UP

CTV viewership in Europe is not just video on demand, as 28% of respondents say that they regularly watch live and simulcast entertainment. Of those that do watch live programming, comedy, news, and sports are the most frequently watched content genres.

9. TVS REALLY ARE GETTING SMARTER

Two-thirds of CTV viewers say they use a smart TV to stream content, versus 20% who use streaming devices and 17% who use gaming consoles. Three-quarters say they use a smart TV most frequently, versus 16% who use streaming devices and 9% who use consoles.

10. CTV IS UNIVERSALLY ACCESSIBLE AND IS A FORMAT FOR EVERYONE

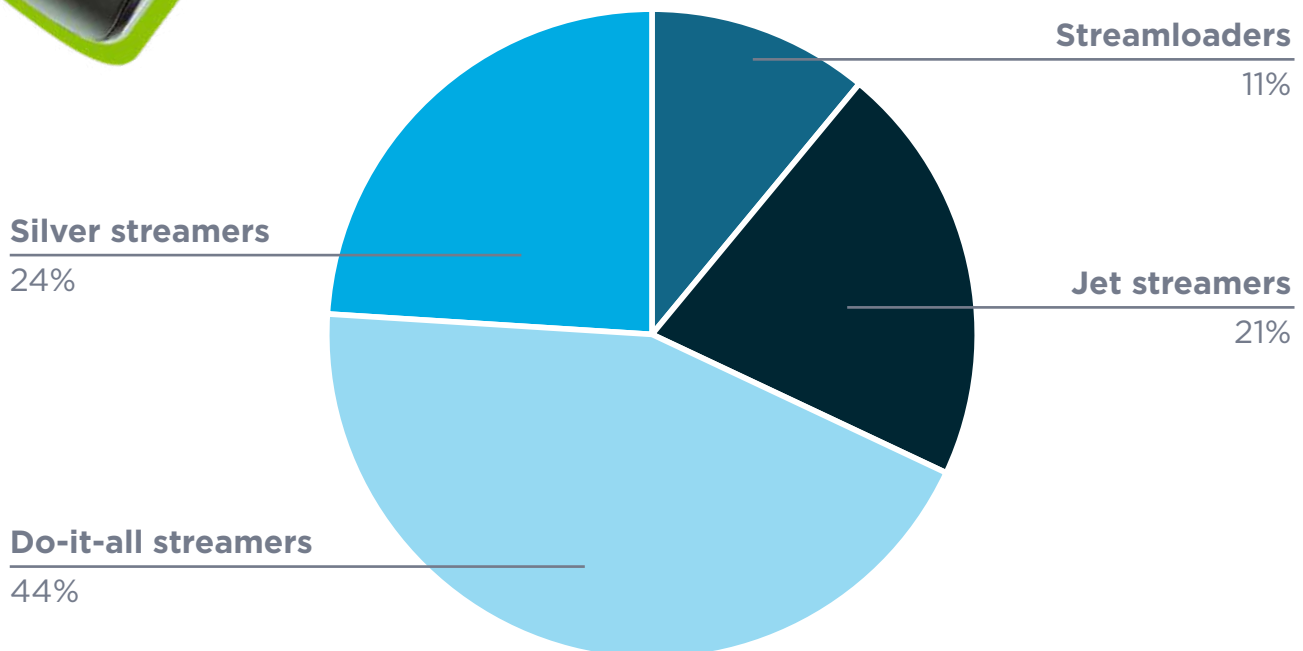
The average annual household income (after-tax) in Europe's Big 5 markets is approximately €40k. We found that CTV households are representative of the general population, with the average CTV household earning between €30k and €50k.



CTV AUDIENCE PROFILES

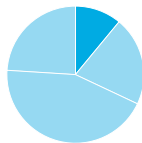


1. Streamloaders: 18-24
2. Jet streamers: 25-34
3. Do-it-all streamers: 35-54
4. Silver streamers: 55+



CTV VIEWERSHIP

Age: **18-24**



Survey respondents:
11%



STREAMLOADERS

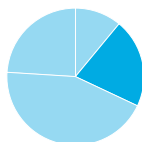
CHARACTERISTICS:

- Most likely to be single, often watch with friends – but are also likely to watch alone
- Prefer to watch during the evening and are the most likely viewers to watch late at night
- Favourite genres include: Comedy, reality, romance

These young adults are heavy streamers; they access a wide variety of content from multiple sources and screens. Streamloaders own several subscriptions despite being the most likely to share someone else's. They are also highly likely to watch ad-supported content on a daily basis – making them a desirable but challenging-to-reach demographic.

INTERESTS: Playing sports | Dining out | Going to movies and theatre

Age: **25-34**



Survey respondents:
21%



JET STREAMERS

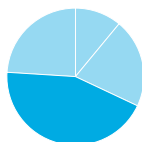
CHARACTERISTICS:

- Likely to watch with a partner or children and rarely watch alone
- Appreciate access to free content and are likely to choose ad-supported content versus paid
- Favourite genres include: Drama, sports, horror

Jet streamers are millennial professionals that are digitally savvy and seek convenience and variety from their streaming services. CTV is their primary way of watching television and they are the most likely of all audiences to watch on a daily basis.

INTERESTS: Dining out | Attending concerts | Attending sporting events

Age: **35-54**



Survey respondents:
44%



DO-IT-ALL STREAMERS

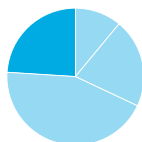
CHARACTERISTICS:

- Prefer on-demand content and appreciate access to ad-supported programming
- Unlikely to share subscriptions with others outside of the household
- Favourite genres include: Action, science fiction, kids and family

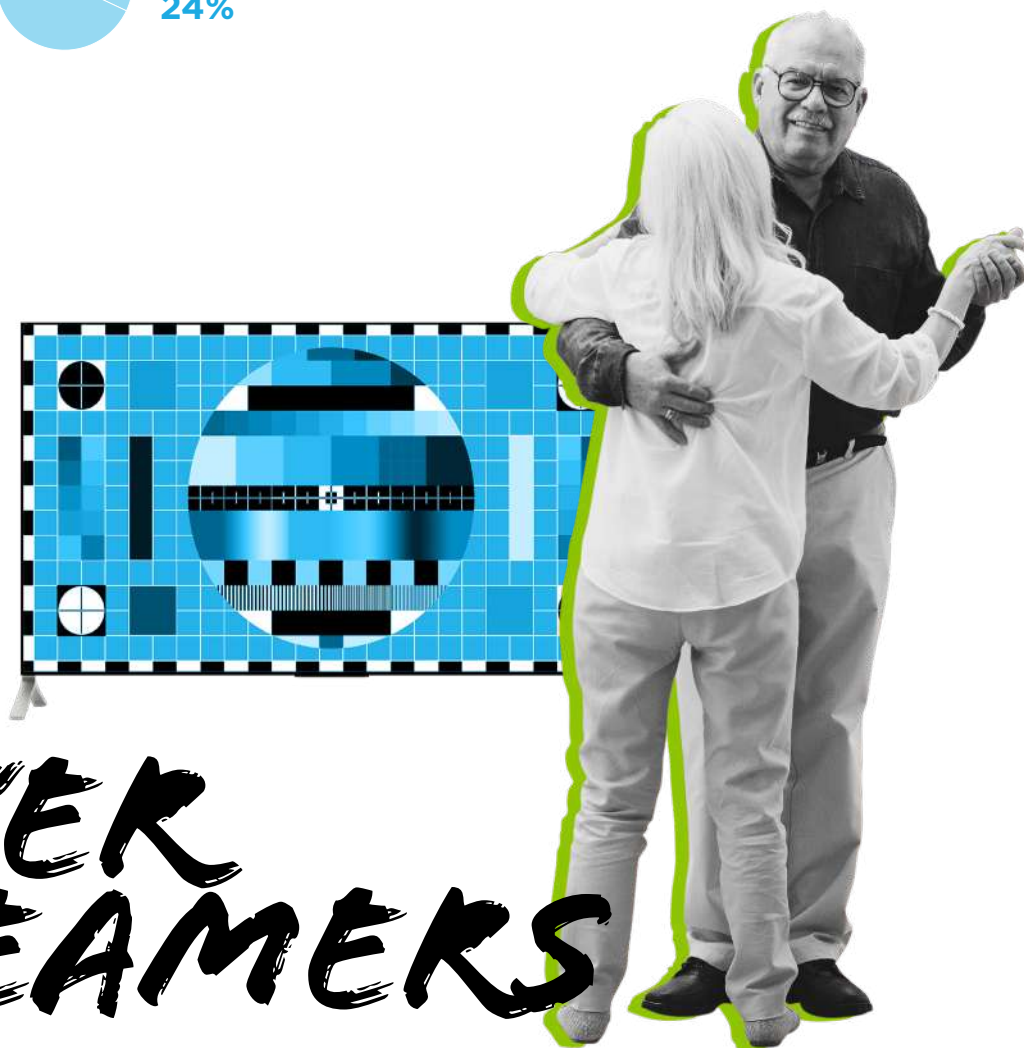
The do-it-all streamer group is large and diverse. They are busy balancing work and family, are highly likely to live with a partner, and are the most likely group to have children in the household – so they particularly enjoy the flexibility and variety that CTV provides.

INTERESTS: Dining out | Home improvement and home projects | Cooking

Age: **55+**



Survey respondents:
24%



SILVER STREAMERS

CHARACTERISTICS:

- Highly likely to choose ad-supported versus paid programming
- The most focused and engaged of all audiences; they rarely do other things while watching
- Favourite genres include: News, documentary, thriller

This group is made up predominantly of baby boomers who are approaching retirement or are already retired. Flexibility is a particularly attractive aspect of CTV for this audience despite being the age group most accustomed to linear-style viewing. Much of what they watch is on-demand content, with the exception of live news.

INTERESTS: Traveling | Reading | Gardening

SAMSUNG Ads

INSIGHTS FROM SAMSUNG ADS

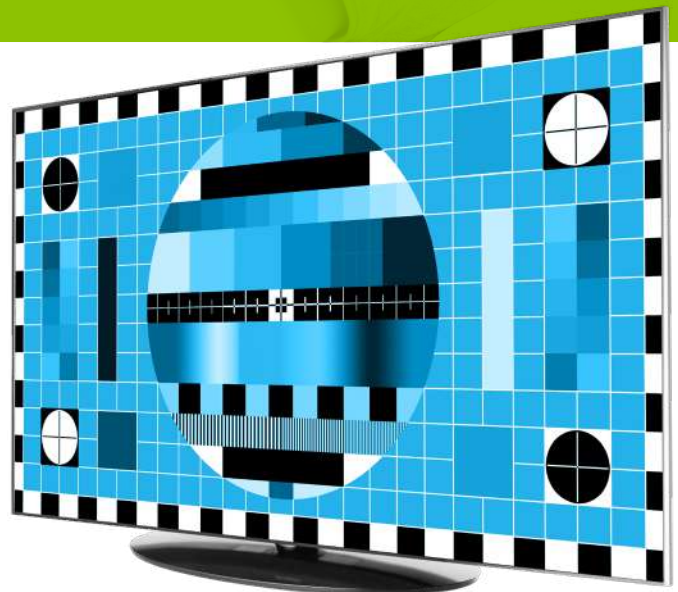
As the leading connected audience platform, with insights from over 30 million Samsung Smart TVs across Europe, Samsung Ads provides advertisers with a holistic view of TV viewership behaviours.

After receiving the initial findings of this report, Samsung Ads confirmed that many of the trends identified are in-line with data points from its platform and provided the following additional insights:

TV IS THE HEART OF THE HOME

The appeal of CTV is the convenience and choice that it provides, but too much choice can ultimately make the viewing experience difficult to navigate. That is why content discoverability is at the heart Samsung TV user experience.

- In a study conducted by Samsung SmartLab+, 92% of respondents agreed that access to apps is the most important benefit of Smart TVs – for example, being able to open the Amazon Prime Video app from the main menu.
- In the same study, the second most important benefit for TV viewers was the fast response interface, and being able to access all TV content in one place¹.

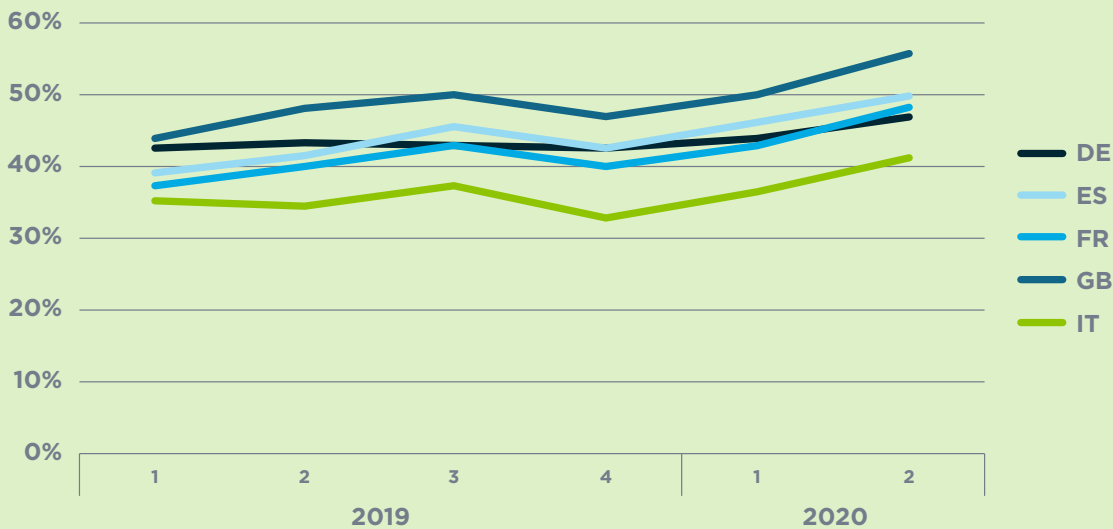


¹Source: SmartLab+ – Smart TVs – Pan-EU – July 2018. Q14.; SmartLab+ respondents Pan-EU (n = 175)

ACCELERATED GROWTH OF STREAMING

There has been strong growth in streaming hours across Samsung Smart TVs in the five key European markets throughout the last year – with streaming accounting for more than 40% of all TV viewing time in all five markets.

PERCENTAGE OF STREAMING TIME OUT OF TOTAL VIEWING HOURS



PLATFORM SURFING

The way households consume TV content is changing. Samsung Ads' data reveals that linear TV consumption is still strong, but that many viewers switch between linear and OTT content — a behaviour Samsung Ads refers to as “platform surfing.”

THE ROLE OF AD-SUPPORTED VIDEO ON DEMAND (AVOD)

Samsung Ads data suggests that more than half of TV viewers are hard-to-reach audiences, meaning they are challenging for advertisers to reach via traditional live TV channels because their viewership patterns show they are heavy streamers. AVOD provides advertisers with an opportunity to target this otherwise unreachable, highly desired TV audience.

UK



STATE OF THE UK MARKET

UK CTV audiences are amongst the most advanced in Europe. Key market enablers are in place to support high levels of CTV viewing, such as fast and widespread broadband access, [which Statista measured at 79% in 2019](#), as well as increased consumer awareness.

Smart TV penetration is higher than the European average at 1.41, and consumers show a preference for the enhanced user experience that CTV viewing facilitates.

“Consumers always have and always will want the best quality content to watch at their convenience, and they want to watch it on the best screen available. Connected TVs have been a great enabler of this, driving significant shifts in viewing behaviour, with 42% of TVs watching less than two hours of traditional linear TV per month (Samsung Ads Q1, 2020). However, from an ad point of view, we have not yet realised the potential that CTV can bring to our campaigns: greater targeting; greater automation; greater addressability. This is changing rapidly with development of addressable capabilities accelerating across players from broadcasters such as ITV and C4, to newer platforms such as Samsung TV Plus. These are key drivers in enabling us to harness the benefits that CTV can bring to advertising and will enable us to reach all TV consumers when, in what content, and on whatever screen they are watching. Whether you are a broadcaster or a new app, CTV will be the key driver for growth in the coming years.”

Martin O’Boyle

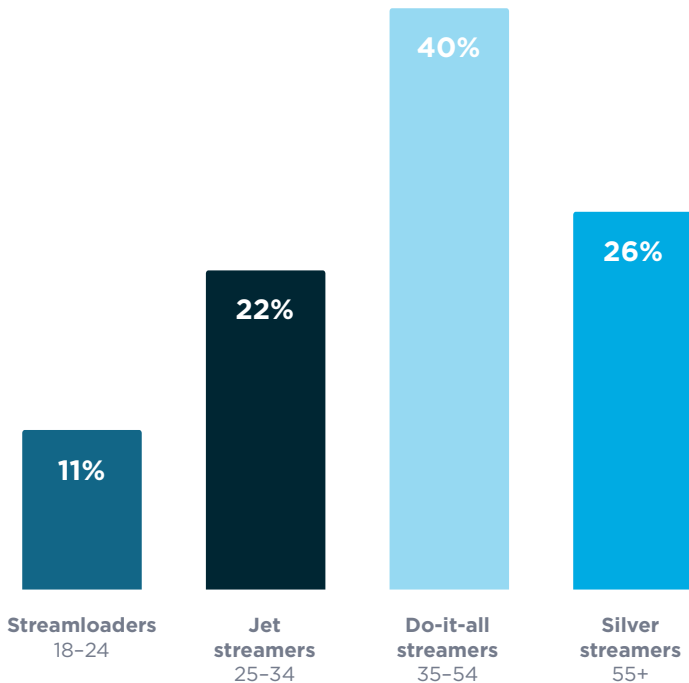
Managing Director at Partnerships PMX at Publicis Media

WHO ARE UK CTV VIEWERS?

CTV has been enthusiastically adopted by all age and socioeconomic groups across the UK. The British audience is richly diverse and watches CTV on a regular basis.



UK



49% are heavy streamers (daily viewers)

60% say they watch CTV as their primary way of watching television

73% regularly watch live programming (at least several times per week)

Favourite content genres include drama, comedy, and thrillers.

CTV is nationally embraced. Neither geographic location or household income influence CTV viewing behaviours. The difference in daily CTV viewership varies most from 34% in Yorkshire, England to 60% in the North East of England, but is otherwise relatively flat. All regions in the UK agree that the main reason they watch CTV is the flexibility to access content whenever they want without relying on traditional linear programming.

Income does not appear to be a barrier to adoption, with 48% of households earning up to £20k a year and 48% of households earning more than £100k a year watching CTV daily. The lower-earning category owns, on average, 1.31 smart TVs and the higher-earning bracket owns 1.72.



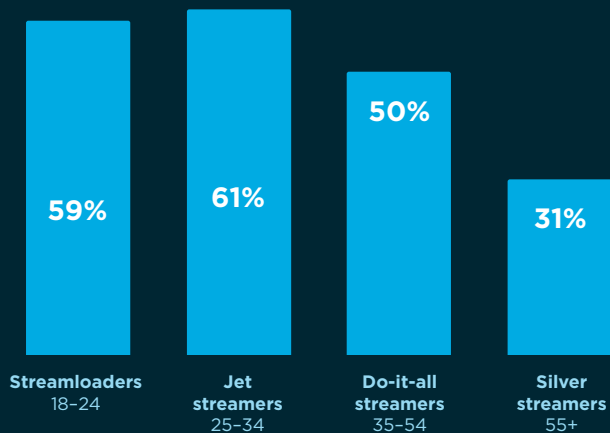


UK

WHEN AND HOW OFTEN ARE THEY WATCHING?

British audiences have made CTV viewing a regular habit, with 69% of survey respondents reporting they watch CTV a few times a week or daily. In addition, 60% say they watch CTV for at least half of their overall TV viewing time.

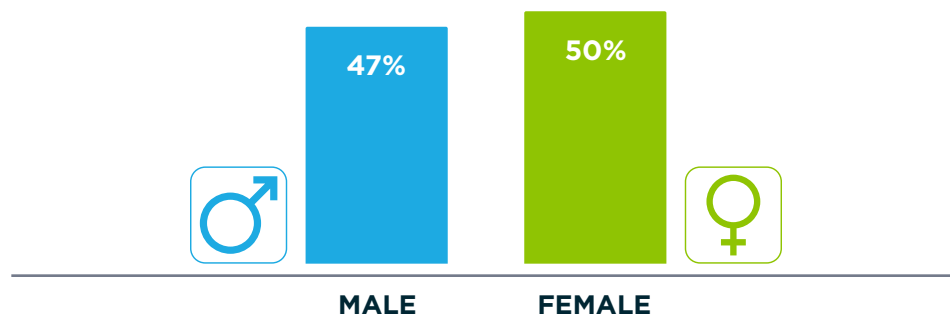
DAILY USE BY AGE



DAILY USE BY HOUSEHOLD ANNUAL INCOME



DAILY USE BY GENDER



HOW DO THEY ACCESS CONTENT?



78% use a smart TV (European average 84%)



36% use a streaming box or stick (European average 26%)



24% use a gaming console (European average 23%)

Multiple answers possible if the household uses more than one device type

WHAT DO THEY WATCH?

There is a clear preference for the flexibility that CTV viewing allows audiences – 1 in 4 respondents cite flexibility, or the ability to watch content at any time, as the main reason for watching CTV. Having the ability to watch what they want, when they want, as much as they want is highly appealing to British TV viewers.

A further 15% say variety is the main reason they watch CTV, validating the increased efforts British content providers are making to enable audiences to watch whatever type of content they wish, whether it be newly commissioned local content or international blockbusters. CTV enables audiences to access content that is unavailable through traditional channels, or requires a fee to watch it.

Drama (59%), comedy (52%), and thrillers (49%) are listed as the top three preferred genres. Crime and action were also popular with nearly half of respondents listing the genres as content they enjoy regularly.

HOW RECEPTIVE TO ADS ARE THEY?

It appears a tipping point has occurred between the initial popularity of subscription-based models and free advertising-supported platforms. UK audiences are looking to free services for CTV viewing as they hit a saturation point of three paid subscriptions.

Of British CTV viewers, 64% are more likely to choose an ad-supported streaming service over a paid subscription.

The majority of consumers (70%) say they do not spend more than £20 a month on streaming subscription services and 78% say they predict this investment to stay the same for the next 12 months. This trajectory leaves opportunity for free or low-cost ad-supported platforms to grow within the UK market.



UK

SAMSUNG

Ads

SAMSUNG ADS' INSIGHTS: UK

- Streaming hours have increased by 48% on Samsung Smart TVs in the second quarter of this year compared to the first quarter and have now exceeded live linear TV hours in the UK for the first time. By the end of Q1 2020, streaming hours equaled 50% of the total TV viewership time, which grew to over 55% in the second quarter and is on track to continue to grow.
- OTT-exclusive viewership (i.e. watching zero hours of traditional linear TV per month) has grown from 10% to 14% on Samsung Smart TVs in the UK (Q1 2019 vs. Q1 2020).
- Currently, 70% of Samsung TV viewers in the UK navigate between linear and OTT content when they watch TV, consuming 38 hours of OTT content per month in Q1 2020.
- Over half (57%) of Samsung TV Plus (Samsung's free ad-supported video service) viewers in the UK are either heavy streamers or light linear viewers, watching less than two hours of traditional linear TV content every month — behaviour that is also evident in Germany, Spain, Italy, and France.

GERMANY



STATE OF THE GERMAN MARKET

German consumers have been somewhat slower to change their TV viewing habits than their European counterparts. Free-to-air (FTA), linear programming is still popular, particularly amongst older generations. As a new decade begins, data suggests consumer behaviour is evolving, allowing a clear pathway to increased CTV viewing.

“Smart TVs have become a central focus within the living room environment. This trend has developed throughout the DACH region and across all generations. Regular and daily use is increasing enormously and advertising acceptance among viewers is high. Now is the time for advertisers to make the most of this opportunity.

TV audiences, as well as brands wishing to spend their advertising budgets on video, have become more agnostic to the technology that delivers TV content. Rather, it is the type of usage as well as reach and target group accuracy which play a decisive role. In this context, smart TVs with their app-based VOD offerings will certainly continue to gain relevance.

In the German market, more individualistic targeting is on the rise and this trend is set to continue. Demographic targeting via panels, or first-party data from apps, will also become more sophisticated in the future, both qualitatively and quantitatively. The demographic and usage-based targeting options make advertising on smart TVs a consistent extension of any moving image strategy. Advertising customers can now reach the users of non-linear content on the big screen in a targeted manner.”

Michi Baum

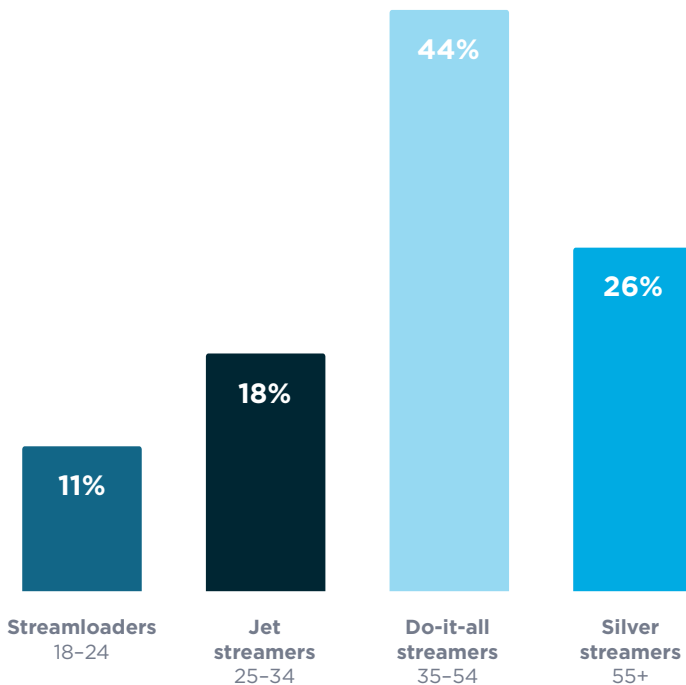
Director at DACH Goldbach

WHO ARE GERMAN CTV VIEWERS?

German audiences are slightly less likely to watch ad-supported content than other European audiences. However, they are the least likely to multitask while watching TV, making them the most focused and engaged of the European audiences.



GERMANY



38% are heavy streamers (watch daily)

53% say they watch CTV as their primary way of watching television

58% rarely do other things while they watch

Favourite content genres include thrillers, action, and documentaries

There is a clear generational divide between the way Germans consume TV content. Younger audiences watch more often, as 59% of 18-24 year olds watch CTV daily, compared to only 25% of those over 55 years old. Younger audiences also show a preference for CTV viewing over traditional TV, with 58% of 18-24 year olds spending more than half their time watching CTV. Only 38% of those who are over 55 do the same.

Income is certainly not a barrier for CTV consumption, with those on a lower salary actually watching CTV content on a more regular basis. About half (53%) of households earning less than €1k a month watch CTV content daily, compared to 41% that earn over €5k.





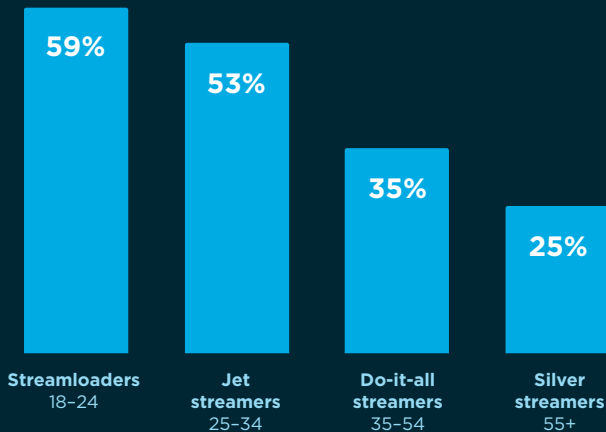
GERMANY

WHEN AND HOW OFTEN ARE THEY WATCHING?

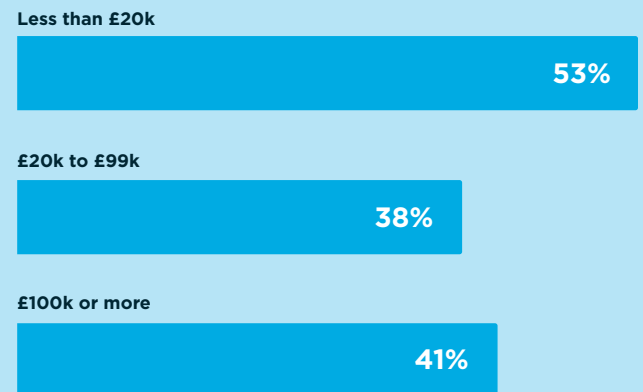
Of German respondents, 53% say they watch CTV over half of their total TV viewing time. Similarly to the UK, 28% cite flexibility as the main reason for their CTV viewing, a direct response to linear's fixed schedule. A further 17% identify variety as the most appealing aspect.

Once German audiences experience the benefits of CTV viewing, they tend to prioritise it. We see that the majority (82%) of those who watch CTV regularly watch it at least a few times a week or daily, illustrating how those who do adopt the new technology are quickly converted to regular users.

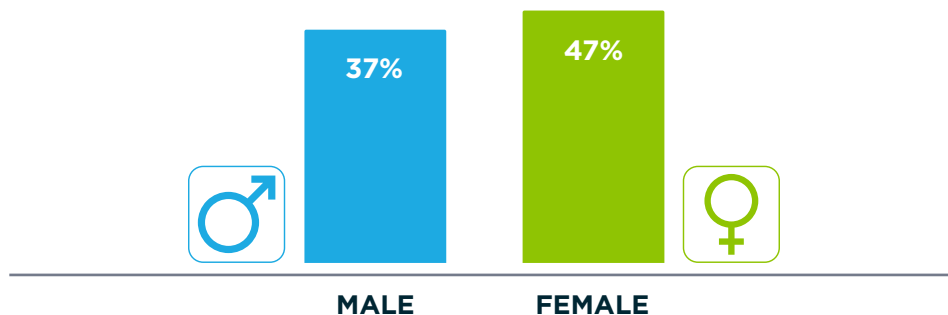
DAILY USE BY AGE



DAILY USE BY HOUSEHOLD ANNUAL INCOME



DAILY USE BY GENDER



HOW DO THEY ACCESS CONTENT?



83% use a smart TV (European average 84%)



32% use a streaming box or stick (European average 26%)



24% use a gaming console (European average 23%)

Multiple answers possible if the household uses more than one device type

German audiences are in line with the average European CTV adoption levels at a household level. They have the same mean average of smart TVs as the rest of Europe (1.38) and are only slightly behind levels of streaming sticks (1.37) and gaming consoles (1.54).

German CTV viewers have a more individualistic relationship with their streaming platforms than other Europeans, and are the least likely to share subscription access. 1 in 3 Germans have a streaming subscription which they do not share with anyone else, compared to the European average of 1 in 5. Germans own an average of 1.86 streaming subscriptions.

WHAT DO THEY WATCH?

The most popular genre in Germany is thrillers, with 53% of respondents ranking this as a preferred category. Action also scores highly at 52% and documentaries follow with 45%.

HOW RECEPTIVE TO ADS ARE THEY?

Most Germans (67%) spend no more than €20 a month on streaming subscriptions and 80% predict this cost will remain the same for the next 12 months.

However, 40% say they are likely to watch ads in exchange for free content. This identifies an opportunity for ad-supported platforms to grow within the German market.



GERMANY

SAMSUNG

Ads

SAMSUNG ADS' INSIGHTS: GERMANY

- Streaming hours have increased by 24% on Samsung Smart TVs in Germany in Q2 compared to Q1 this year.
- The majority (68%) of Samsung TV viewers in Germany navigate between linear and OTT content when they watch TV. Viewers watched 37 hours of OTT content per month in Q1 2020.
- Increasing numbers of viewers are watching CTV content exclusively, bypassing linear altogether. In Q1 2019, 12% of Samsung Smart TV viewers exclusively watched OTT content, which has increased to 16% in Q1 2020.
- In Germany, 55% of Samsung TV Plus (Samsung's free ad-supported video service) viewers are either heavy streamers or light linear viewers, watching less than two hours of linear TV content every month.

FRANCE

STATE OF THE FRENCH MARKET

There are several factors which have slowed the broadscale use of CTV in France, making it a unique case in comparison with the rest of Europe. Historically, CTV services have taken second place behind the embedded IPTV delivery system. Strict legislation prohibited addressable advertising alongside linear TV, and traditional household structures meant that many consumers only viewed content contained within the operator-managed ecosystems of set-top boxes at a pre-scheduled time.

Today, broadcaster investment in CTV has increased with platforms creating user-friendly experiences that have encouraged viewers to adjust their viewing habits. As audiences realise the advantages, they are converting to CTV viewing.

“There is no doubt that CTV presents an invaluable opportunity for advertisers. At The Trade Desk we recently conducted a survey which found that 66% of people in France started watching a new streaming service during lockdown. Whilst the past few months have fast-tracked TV’s shift to digital, this trend has been a long time in the making.

There is an increasing appetite from advertisers to use this shift in media consumption and access CTV inventory, especially to complement online video strategies. Brands are now realising the value of appearing next to premium content on bigger screens, in an environment where consumers are highly engaged.

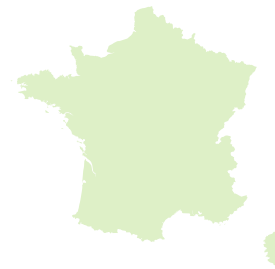
Furthermore, rather than limiting scope of TV campaigns to linear channels, CTV can provide incremental reach, and more precise targeting. In France in particular, linear and digital TV are moving closer together. With One PTV, TF1 became the first established TV channel to make its inventories available on digital programming platforms. This unique solution in France opens TV purchasing up to digital buyers and allows advertisers to compare linear and digital video directly. Once segmented TV really gets moving in France, as it soon will, advertisers will be grateful to have experience in working with CTV, and reaping the benefits of it.”

François-Xavier Le Ray

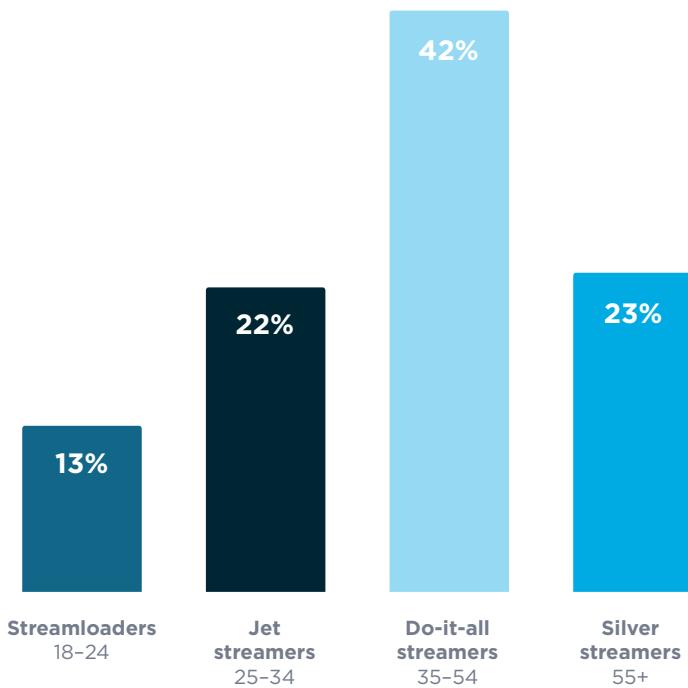
General Manager France & Belgium at The Trade Desk

WHO ARE FRENCH CTV VIEWERS?

French audiences have embraced CTV as more French-language programming has been introduced. On the whole, French audiences welcome free content that is supported by ads.



FRANCE



45% are heavy streamers (watch daily)

54% say they watch CTV as their primary way of watching television

48% of CTV households have children

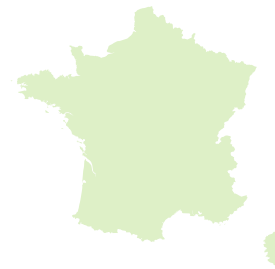
Favourite content genres include action, comedy, and crime

French CTV viewers come from a cross-section of society, with fairly even adoption across income, gender, and household size.

Income is not a barrier for CTV viewing. Half of households earning less than €20k per year watch CTV daily, with only an 8% increase for those who earn more than €100k per year. Equally, households earning less than €20k per year own at least one smart TV (1.21), illustrating that low-income households still have access to CTV-enabled technology.

Men and women watch a similar amount of CTV content, with 45% of men viewing CTV daily compared to 44% of women. Household size does not affect the amount of daily viewing, as 46% of single occupancy households watch daily compared to 50% of households with five or more members.





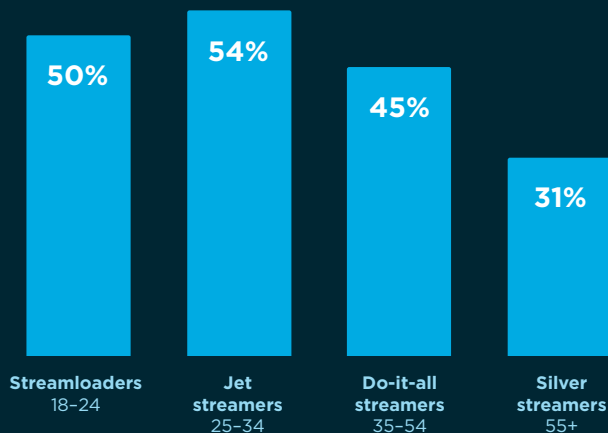
FRANCE

WHEN AND HOW OFTEN ARE THEY WATCHING?

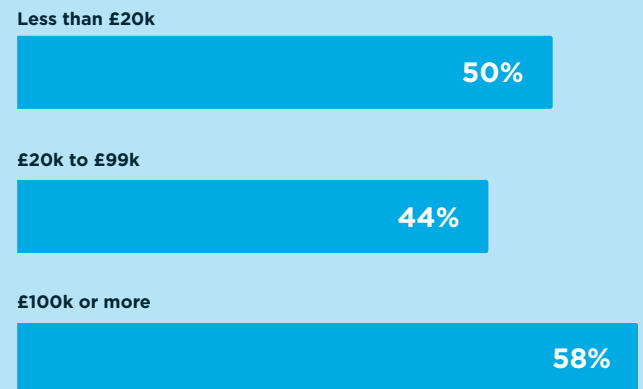
More than half (54%) of respondents watched CTV content for at least half of their total TV viewing time, illustrating a preference for this over traditional linear TV. In the 25-34 age group, this increases to 64%.

French viewers also show a preference for watching content with others — 60% watch CTV content with a partner while just 25% watch alone.

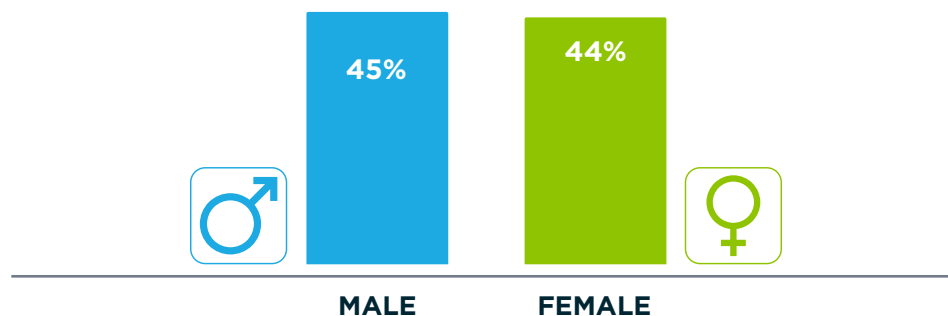
DAILY USE BY AGE



DAILY USE BY HOUSEHOLD ANNUAL INCOME



DAILY USE BY GENDER



HOW DO THEY ACCESS CONTENT?



83% use a smart TV (European average 84%)



20% use a streaming box or stick (European average 26%)



22% use a gaming console (European average 23%)

Multiple answers possible if the household uses more than one device type

WHAT DO THEY WATCH?

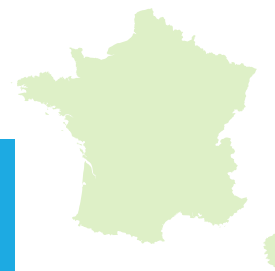
French-language content has become more widely available in France, increasing total CTV viewership as audiences are able to watch their favourite shows in their native language.

Action (53%), comedy (51%), and crime (48%) are the most popular genres in France to watch on CTV. Comedy is also popular live content, with 57% listing it as their preferred genre to watch live.

HOW RECEPTIVE TO ADS ARE THEY?

Participants say, on average, that they would have no more than three paid subscriptions. The majority (67%) say they spend no more than €20 a month on streaming subscriptions, but 23% say they would be willing to spend more in the next 12 months to access content compared to 8% who say they would likely pay less.

Most (70%) say they would watch ads in order to access free content and 61% say they would prefer free ad-supported content rather than paying for a streaming subscription.



FRANCE

SAMSUNG

Ads

SAMSUNG ADS' INSIGHTS: FRANCE

- Overall, streaming on Samsung Smart TVs in France is continuing to grow, with a strong 40% increase in streaming hours in Q2 compared to Q1 this year.
- Most Samsung Smart TV viewers (74%) navigate between linear and OTT content when they watch TV, consuming 40 hours of OTT content per month in Q1 2020.
- OTT-exclusive viewership in France grew by two percentage points year-over-year (YOY), from 9% in Q1 2019 to 11% in Q1 2020. This increase is less than other markets, but the growth is still there, reflecting a wider trend across the five key European markets.
- In France, 58% of Samsung TV Plus (Samsung's free ad-supported video service) viewers are either heavy streamers or light linear viewers and watch less than two hours of linear TV content every month — higher than Germany and the UK, but lower than Italy and Spain.



STATE OF THE ITALIAN MARKET

Initial consumer adoption of CTV in Italy was slow due to low broadband and smart TV penetration. However, significant investments have been made from across the ecosystem to combat this and make CTV a new revenue stream for broadcasters and advertisers.

Today, Italian viewers have integrated CTV into their regular TV viewing habits and have shown themselves to be some of the most advanced viewers in Europe.

“Italy is one of the most TV-reliant markets in Europe, where individuals still watch more than four hours of traditional linear TV per day. However, 50% of the Italian households are now equipped with connected TV screens and the figures are growing year on year (+3%) according to eMarketer.

CTV usage per household is also growing as more streaming services become available in the market, whether they are subscription-based (Netflix, Amazon Prime) or ad-supported. According to Rai, their Rai Play service has seen a +50% increase in streaming between January and May 2020. The COVID-19 lockdown has accelerated this trend with CTV becoming the go-to screen to stream online video content.

Italian advertisers understand the opportunity to combine the strong targeting capabilities of digital with the attention driven by the big screen. Opportunity to reach high income as well as younger audiences through CTV users’ profiles is also highly valued.”

Simone Blei

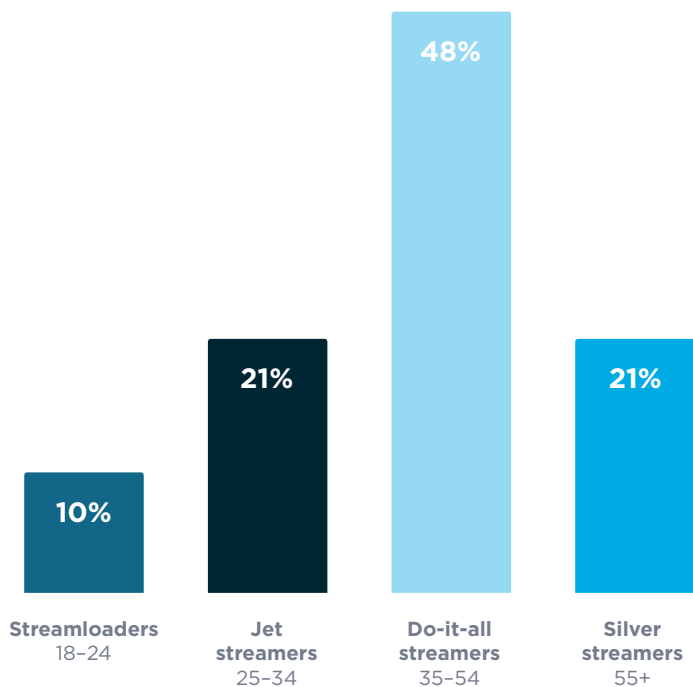
Global Sales Director at RTL AdConnect

WHO ARE ITALIAN CTV VIEWERS?

CTV audiences in Italy tend to watch frequently and with others, and have a richly diverse set of interests. They are more likely to watch ad-supported content than any other European market.



ITALY

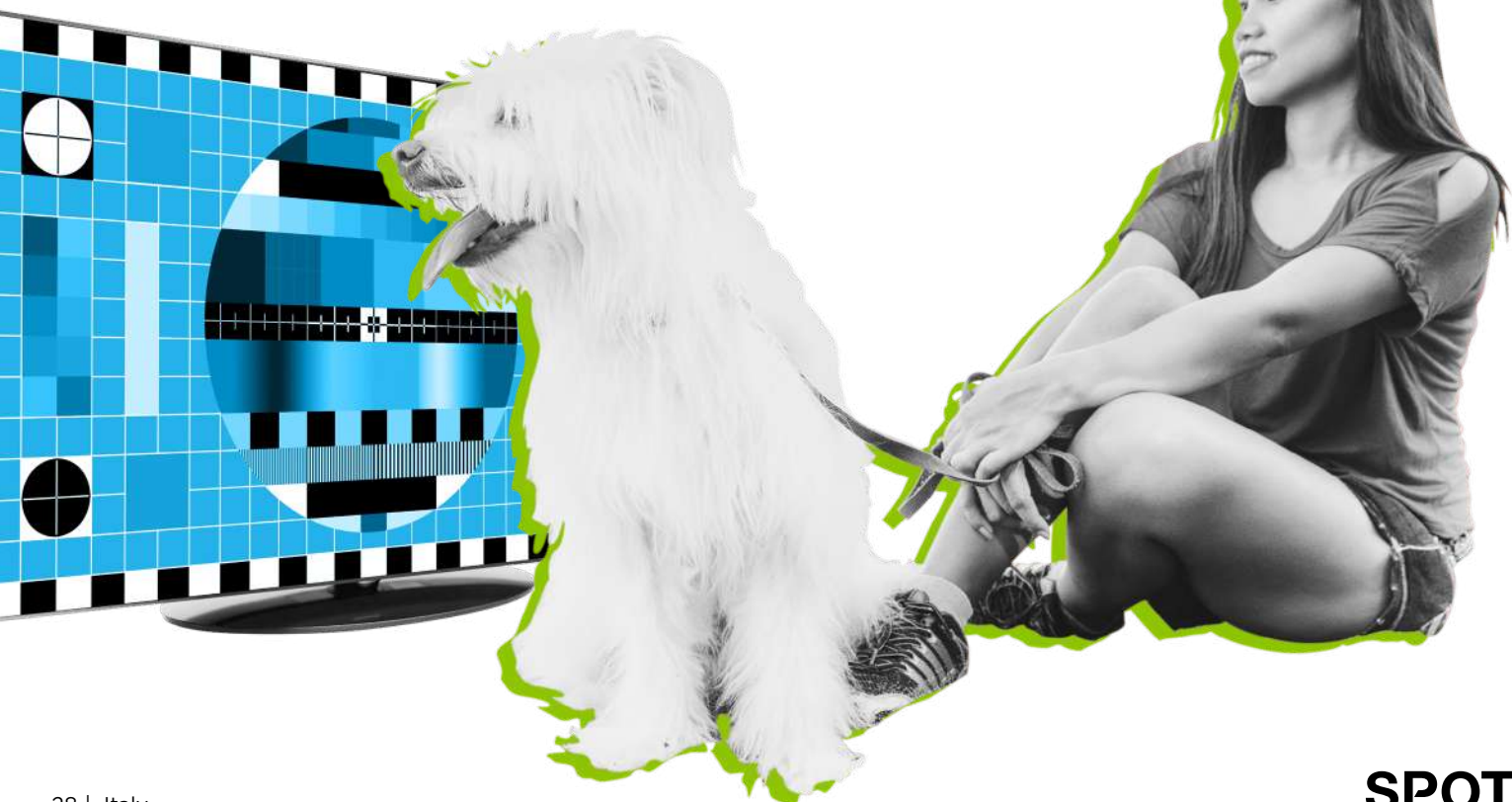


55% are heavy streamers (watch daily)

56% say they watch CTV as their primary way of watching television

65% prefer ad-supported programming versus paying for ad-free content

Favourite content genres include action, comedy, and thrillers



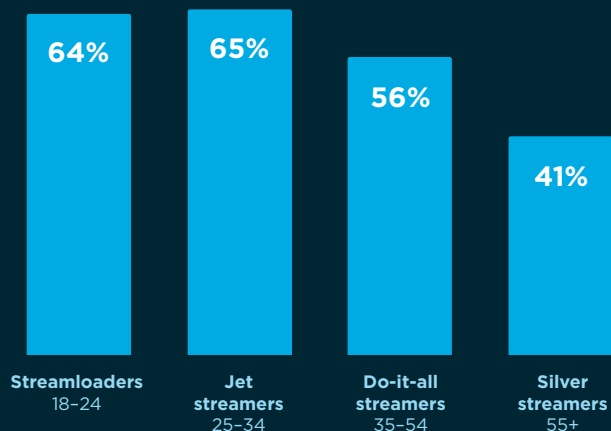


ITALY

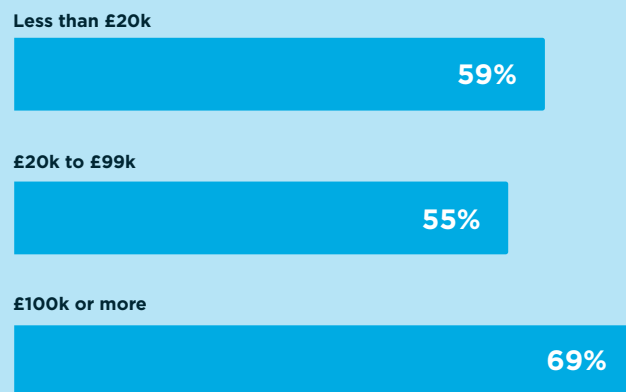
WHEN AND HOW OFTEN ARE THEY WATCHING?

Of Italian CTV audiences, 55% spend more than half of their total TV viewing time watching on a connected TV. Similarly, 55% watch CTV content daily.

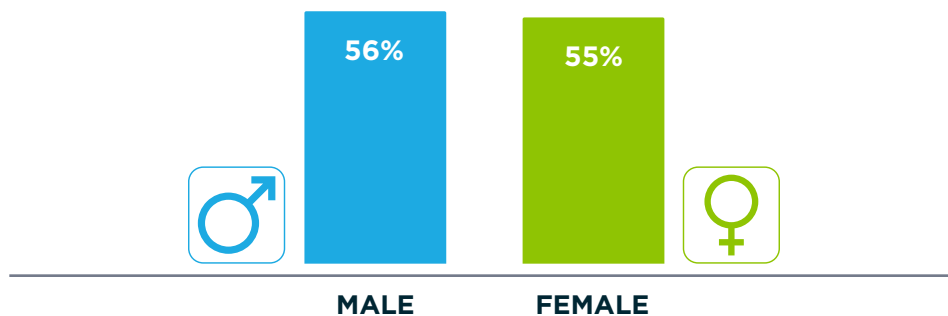
DAILY USE BY AGE



DAILY USE BY HOUSEHOLD ANNUAL INCOME



DAILY USE BY GENDER



HOW DO THEY ACCESS CONTENT?



88% use a smart TV (European average 84%)



21% use a streaming box or stick (European average 26%)



22% use a gaming console (European average 23%)

Multiple answers possible if the household uses more than one device type

Italians, on average, have 1.86 streaming subscriptions and report that they would not subscribe to more than 3.26 at one time.

WHAT DO THEY WATCH?

Content variety is key for Italians, as 3 in 5 viewers stream because their favourite shows or movies are not available on traditional TV, while 27% say that flexibility – being able to watch what they want, when they want – is the main reason they turn to CTV.

HOW RECEPTIVE TO ADS ARE THEY?

There is a clear appetite for free ad-supported content amongst Italian viewers. The proportion of Italians (65%) opting to choose a free but ad-supported CTV service over a paid subscription is the highest across European markets.

Most (65%) spend under €20 a month on subscriptions and 73% believe they will spend the same amount in the next 12 months, leaving room for ad-supported platforms to grow. In fact, 73% say they are likely or somewhat likely to watch CTV content if streaming it was free, but required them to watch ads.



ITALY

SAMSUNG Ads

SAMSUNG ADS' INSIGHTS: ITALY

- There has been a 38% increase in hours spent streaming content on Samsung Smart TVs in the second quarter of this year compared to the first quarter.
- Viewership fragmentation is evident in Italy as much as in the other European countries, as 78% of Samsung Smart TV viewers navigate between linear and OTT content. Viewers consumed 33 hours of OTT content per month in Q1 of 2020.
- Of Italian Samsung TV Plus (Samsung's free ad-supported video service) viewers, 58% are heavy streamers or light linear viewers, watching less than two hours of linear TV content per month — higher than Germany, the UK, and France.

SPAIN



STATE OF THE SPANISH MARKET

Demand for internet-delivered television has been high in the Spanish market since its conception. Over the past three years, investment from major FTA broadcasters have fulfilled this demand and provided audiences with the opportunity to expand their TV viewing.

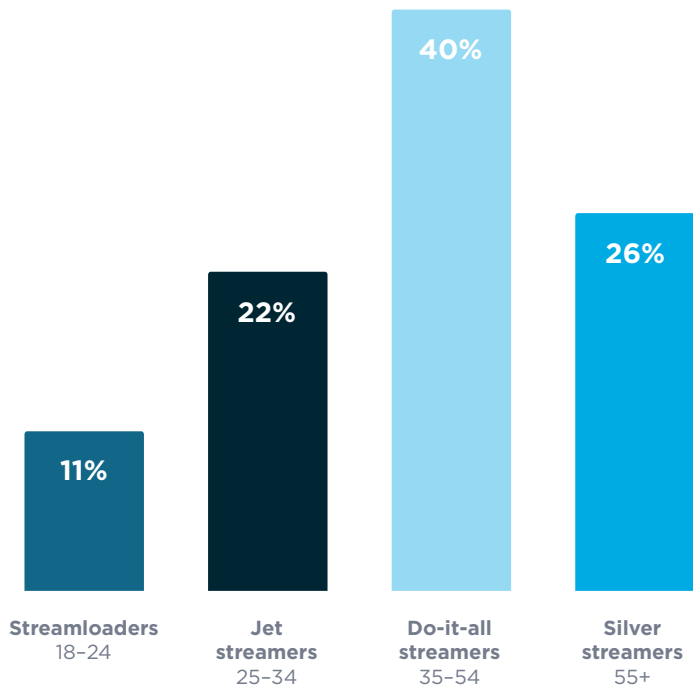
CTV penetration and awareness has grown considerably since 2017, and now Spanish audiences and advertisers are taking advantage of the matured format.

WHO ARE SPANISH CTV VIEWERS?

Spanish audiences are the most prolific consumers of CTV content, watching more frequently than any other European market. They are also the most likely to watch with someone else – just 18% of Spanish viewers usually stream alone.



SPAIN



65% are heavy streamers (watch daily)

59% say they watch CTV as their primary way of watching television

44% regularly stream live sports – more than any other market

Favourite content genres include action, comedy, and sci-fi





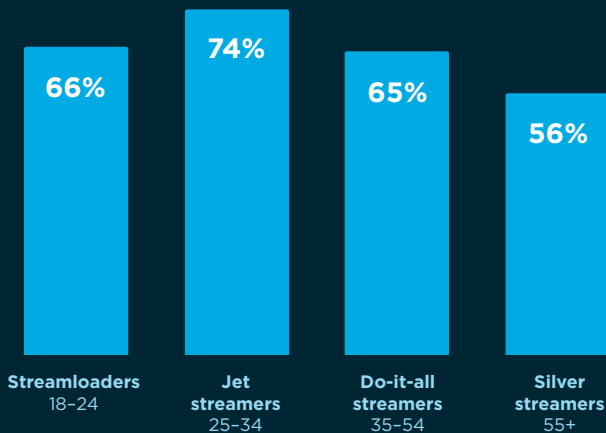
WHEN AND HOW OFTEN ARE THEY WATCHING?

Spanish audiences watch CTV more often than the average European — 65% watch CTV daily compared to an average of 50% of viewers across Europe.

Flexibility is key, as 28% of viewers say it's why they choose CTV, and another 15% of respondents watch because they prefer viewing digital video content on the large screens associated with CTV.

Finally, 63% stream because their favourite shows or movies are not available on traditional TV.

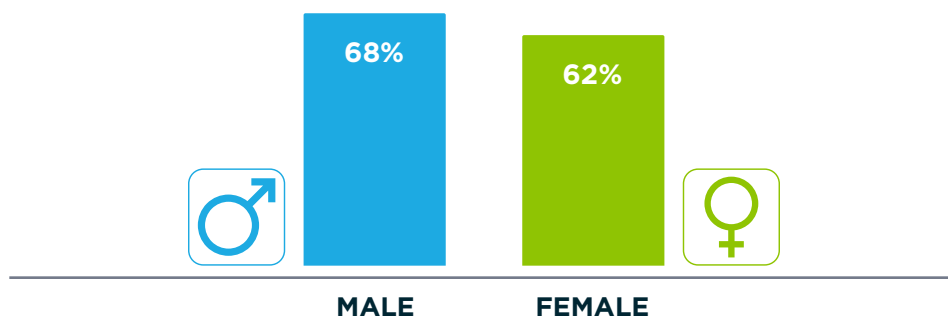
DAILY USE BY AGE



DAILY USE BY HOUSEHOLD ANNUAL INCOME



DAILY USE BY GENDER



HOW DO THEY ACCESS CONTENT?



88% use a smart TV (European average 84%)



23% use a streaming box or stick (European average 26%)



25% use a gaming console (European average 23%)

Multiple answers possible if the household uses more than one device type

In Spain, 88% of viewers watch CTV through smart TVs compared to the European average of 84%. Consistent with other Europeans, half (49%) of Spaniards cite smart TV as their preferred viewing device.

Respondents had an average of 2.06 streaming subscriptions per household and believe that 3.37 subscriptions would be the maximum they would own per household.

WHAT DO THEY WATCH?

The most-watched content genres across Spain include action (59%), comedy (61%), and sci-fi (52%).

CTV is particularly popular to watch with other family members, with 68% of viewers watching with a partner and 44% watching with children.

HOW RECEPTIVE TO ADS ARE THEY?

Spanish audiences are receptive to advertising, and 74% are likely or somewhat likely to watch ads in exchange for free content. However, respondents are divided equally when it comes to choosing a streaming service which is free but ad-supported (49%) versus paying for an ad-free streaming service (51%).



SPAIN

SAMSUNG

Ads

SAMSUNG ADS' INSIGHTS: SPAIN

- Out of all the five key European markets covered in this report, growth in streaming has accelerated the fastest in Spain alongside the UK, with a sharp 48% increase in the amount of OTT content watched on Samsung Smart TVs in Q2 2020 vs Q1 2020 — followed by France.
- Viewership fragmentation is evident in Spain, with 82% of Samsung Smart TV users navigating between linear and OTT content. Viewers watched an average of 43 hours of OTT content per month.
- In Q1 2019, 6% of Samsung Smart TV users in Spain were OTT-exclusive viewers, which increased to 8% in Q1 2020.
- Spain has a high number of heavy streamers or light linear viewers, with 58% of Samsung TV Plus (Samsung's free ad-supported video service) viewers watching less than two hours of linear TV content per month. This is the second-highest figure in the five key European markets behind Italy.

SUMMARY:

WHAT'S NEXT

CTV has become embedded in the daily TV viewing habits of European audiences. Whereas it was once a conscious choice to switch to internet-delivered television, consumers now see CTV as a seamless and flexible expansion of the way they access content.

Through investment across the ecosystem as well as increased consumer awareness, CTV has transcended early-adopter niche audiences of the past decade and is now watched by people of every lifestyle, personality, income level, and age group – at scale. For some, it is the best way to watch TV at a time which suits them. For others, it is their preferred and only method of viewing. For all consumers, it is without doubt the best way to access the content they want to watch, on their own terms.

WHAT WE'VE LEARNED:

1. Every type of consumer can be reached by CTV
2. Smart TVs remain the preferred choice for accessing CTV
3. CTV viewers are highly engaged, with half watching daily
4. The primary motivation for switching to CTV is flexibility
5. CTV viewers are not willing to spend much more on subscriptions, but will continue to watch more content, which most likely will be ad-supported



SPOTX'S RECOMMENDATION:

While traditional TV still achieves the scale many advertisers want, the average viewer age is increasing and gradually becoming less reflective of Europe's rich and diverse societies. Advertisers must keep the viewer, and their changing habits, as their focus. CTV can help to achieve that by mirroring Europe's consumer makeup – digital, and demanding. It has become the ideal way to reach specific audiences effectively at scale. **CTV is for everyone.**

As this report demonstrates, CTV viewers and viewing time continue to grow rapidly. Now is the time for advertisers to follow the audience to CTV, though we know navigating a new and evolving medium can be challenging. Our team has been working in the CTV space since the beginning, so we can help you take advantage of the opportunities this powerful medium presents. Whether you'd like a closer look at these research findings or you're ready to advance your CTV strategy, our team is here to guide you.

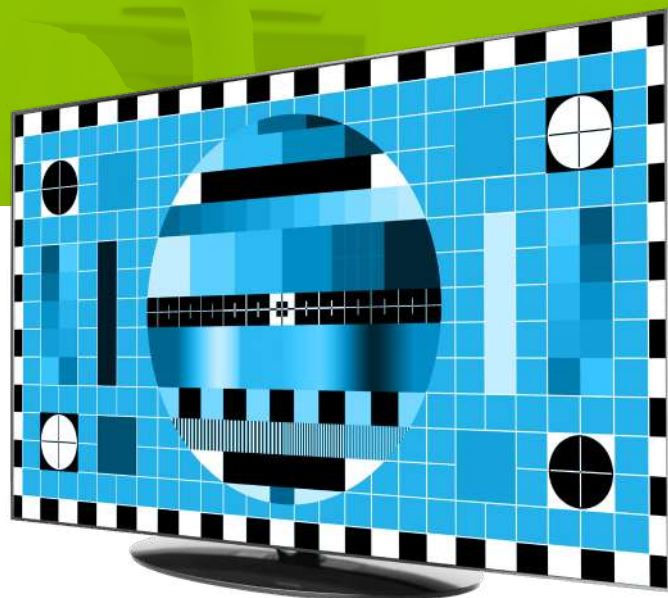


Graeme Lynch

VP, Demand Facilitation, SpotX

**Ask your SpotX representative for more details.
london-demand@spotx.tv**

CTV AUDIENCE SNAPSHOT



Cord-nevers

36%

Cord-cutters

25%

**Currently subscribe
to pay TV
(satellite/IPTV)**

39%

CABLE SUBSCRIPTION STATUS

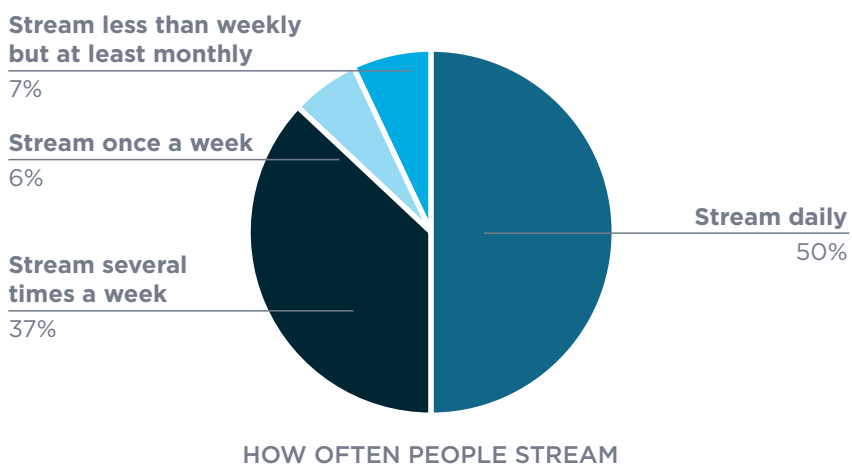
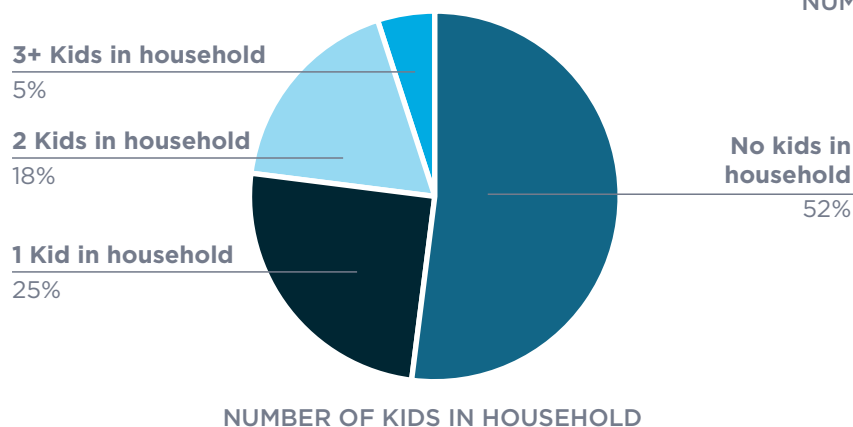
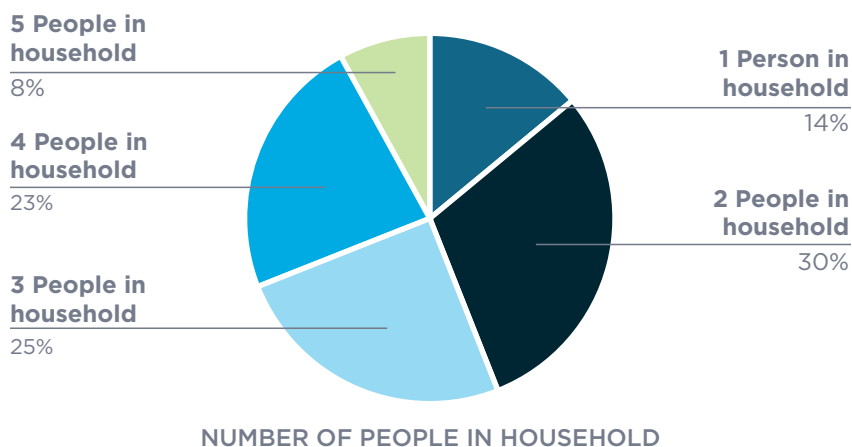
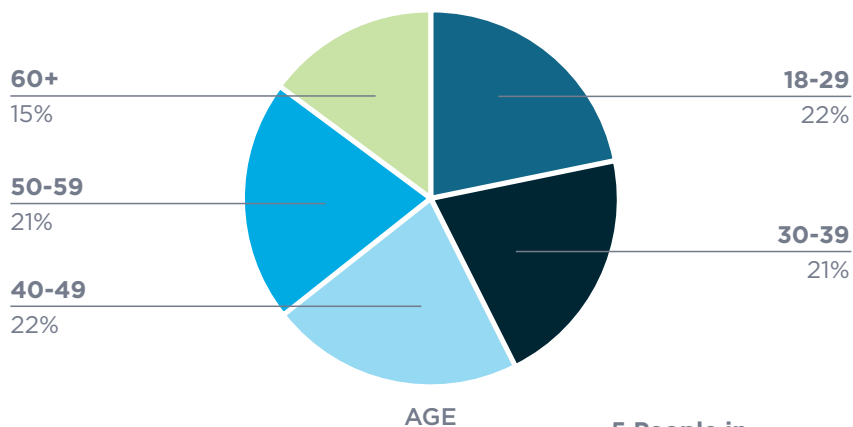
Female

50%

Male

50%

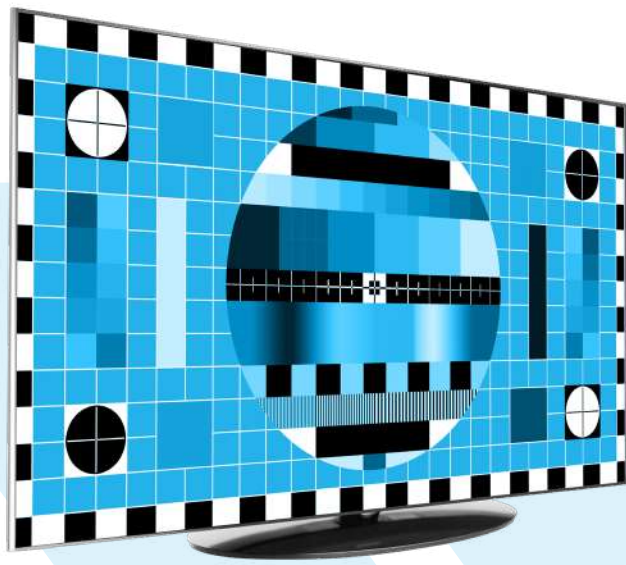
GENDER



Note: This summary is a profile of the SpotX survey respondents who self-identify as CTV viewers. A full 100% of the panel reported watching CTV at least one time per month.
Sample size = 7,500. Conducted March 30 - April 22, 2020.

ABOUT SPOTX

SpotX is the leading video advertising platform shaping digital video and the future of TV globally. The company's solutions enable media owners to monetise content across all screens and streams while providing advertisers with direct access to brand-safe, premium inventory. With best-in-class technology purpose-built for video, SpotX's trusted, GDPR/CCPA-compliant solutions are employed by some of the largest media owners in the world including Atresmedia, Dentsu CCI, Discovery, MailOnline, Pluto TV, Roku, Samsung Ads, STV, Tastemade, and Vevo.



ABOUT STATISTA

Statista Research & Analysis is a provider of market research and business consulting services. Their range of services includes research of secondary data as well as primary market research and data analysis, data-modelling and graphic processing. Statista's team consists of former top-tier management consultants, experienced and knowledgeable market researchers, business analysts, and graphic designers. For more than 10 years, the business has supported clients from all over the world to understand markets, people, and brands.

ABOUT SAMSUNG ADS EUROPE

Samsung Ads drives advanced TV advertising solutions by leveraging first-party data, powered by automatic content recognition (ACR), to deliver greater measurability and analytics to drive business results. With insights from over 30 million Samsung Smart TVs across Europe, Samsung Ads can provide advertisers with a holistic view of TV viewership behaviours.