INSIGHTS
2020

AudienceProject ✄

**Traditional TV
and streaming**

—

US
UK
Germany
Denmark
Sweden
Norway
Finland

CONTENTS

EDITORIAL

Streaming accelerates dramatically during lockdown

Traditional TV under pressure with streaming consumption skyrocketing

Welcome to the 4th edition of our annual TV and streaming study. It would be redundant to editorialise on what a strange year this has been, so let's stick to the data. And the data from this year's study certainly implies that the ongoing Covid crisis is heavily influencing TV and streaming consumption patterns in 2020 - and probably beyond.

In all covered markets (except Finland), the reported weekly traditional TV viewing continues to drop (though the rate of viewing decline slows down compared to previous YoY indications). And for streaming, the jump in reported consumer attention compared to 2019 is enormous.

Now, in some cases, streaming does come with ads, so it is not all bad news for the TV advertising market, even though we see our panel reporting in solid numbers, that they are streaming at the expense of traditional TV. So, for traditional TV providers who have built up strong streamed offerings, there is some positivity here too.

The study also looks at attitudes towards YouTube, how consumers are highly impressed by Disney+, which streaming services are the most popular and much more. We hope you enjoy it and find insights within that will help as we enter the hopefully smoother sailing of 2021.

Martyn Bentley
Commercial Director, UK @ AudienceProject

TRADITIONAL TV

Traditional TV is undoubtedly under pressure, but the decline has slowed in several markets this year. Reported ad irrelevance, overexposure and intent to stream more, are not going to give the format an easy ride next year.

Traditional TV viewing declines in all countries but Finland

[How many watch traditional TV on a weekly basis?]

Legend:
- 2017
- 2018
- 2019
- 2020

US
- 83%
- 73%
- 68%
- 59%

UK
- 80%
- 83%
- 80%
- 79%

Germany
- 83%
- 80%
- 79%

Denmark
- 78%
- 72%
- 73%
- 67%

Sweden
- 79%
- 80%
- 76%
- 70%

Norway
- 84%
- 82%
- 75%
- 72%

Finland
- 86%
- 86%
- 81%
- 84%
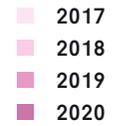
Two-thirds watch TV on commercial channels

[How many watch traditional TV on commercial TV channels on a weekly basis?]

- 2018
- 2019
- 2020

US
- 69%
- 64%
- 55%

UK
- 78%
- 73%
- 73%

Germany
- 70%
- 69%
- 65%

Denmark
- 63%
- 64%
- 60%

Sweden
- 76%
- 69%
- 65%

Norway
- 77%
- 70%
- 68%

Finland
- 82%
- 76%
- 80%
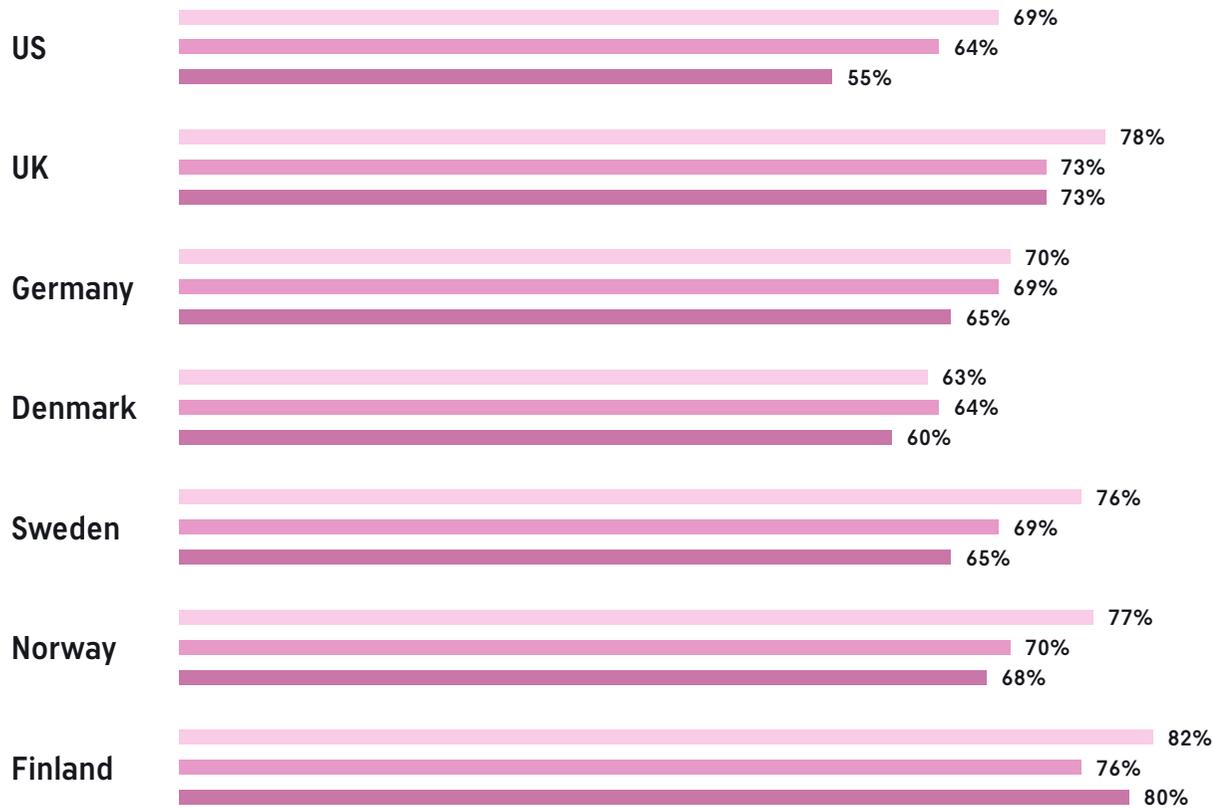
Most people prefer watching the news when watching traditional TV

[How many prefer watching different types of content when watching traditional TV?]

	News	Documentaries	Series	Movies	Sports	Game shows	Reality	Talk shows	Other
US	59%	46%	57%	51%	38%	29%	20%	14%	11%
UK	58%	68%	62%	47%	34%	34%	24%	15%	10%
Germany	72%	60%	48%	65%	31%	22%	10%	17%	8%
Denmark	82%	66%	48%	63%	40%	9%	11%	10%	6%
Sweden	70%	58%	47%	43%	42%	15%	15%	16%	6%
Norway	74%	55%	54%	46%	41%	16%	31%	21%	10%
Finland	65%	59%	63%	55%	36%	29%	23%	29%	4%

The majority of people have watched more news after the COVID-19 pandemic

[How many have watched more of different types of content after the COVID-19 pandemic when watching traditional TV?]

	News	Series	Movies	Documentaries	Reality	Game shows	Talk shows	Sports	Other
US	55%	50%	49%	33%	24%	28%	19%	20%	11%
UK	61%	50%	42%	42%	17%	22%	12%	12%	8%
Germany	63%	35%	33%	43%	11%	14%	12%	8%	6%
Denmark	62%	39%	44%	32%	17%	10%	8%	22%	2%
Sweden	63%	40%	43%	36%	16%	10%	17%	12%	5%
Norway	64%	35%	22%	22%	20%	3%	8%	7%	3%
Finland	61%	63%	46%	38%	22%	18%	25%	11%	3%

9 out of 10 feel that they see the same TV advertisements too many times

[How many feel that they see the same advertisements too many times when watching traditional TV?]

	Yes, to a high degree	Yes, to some degree	No	Don't know
US	53%	40%	5%	2%
UK	37%	49%	10%	4%
Germany	41%	34%	16%	10%
Denmark	58%	30%	5%	7%
Sweden	64%	27%	6%	2%
Norway	62%	28%	4%	7%
Finland	52%	38%	7%	3%

☹ Yes, to a high degree   ☺ Yes, to some degree   ☺ No   ? Don't know
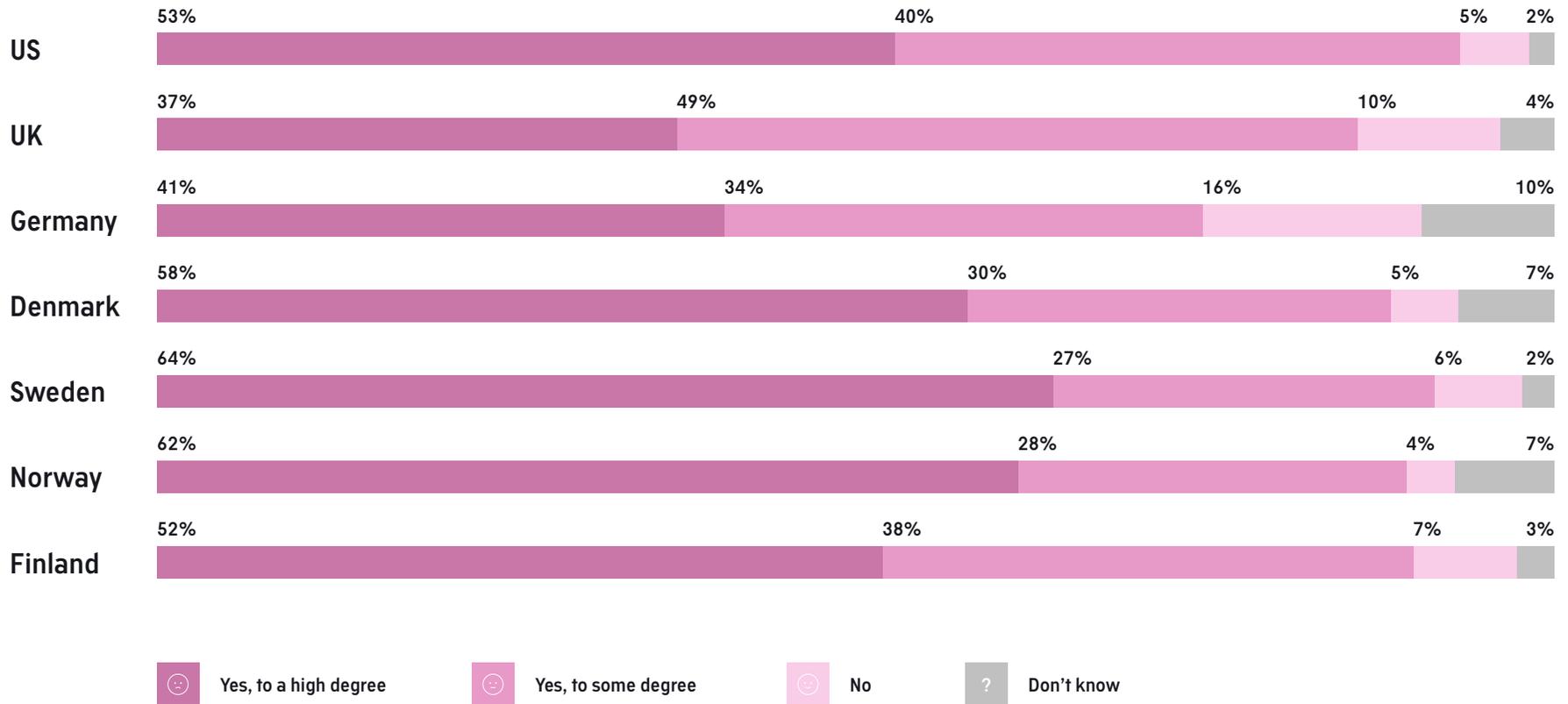
Two-thirds feel that TV advertisements are irrelevant to them

[How many feel that the advertisements they see when watching traditional TV are relevant to them?]

US
3% | 30% | 64% | 3%

UK
2% | 40% | 56% | 3%

Germany
3% | 21% | 72% | 4%

Denmark
1% | 19% | 75% | 6%

Sweden
2% | 26% | 67% | 5%

Norway
2% | 28% | 63% | 7%

Finland
1% | 24% | 68% | 7%

☺ Yes, to a high degree   ☺ Yes, to some degree   ☺ No   ? Don't know
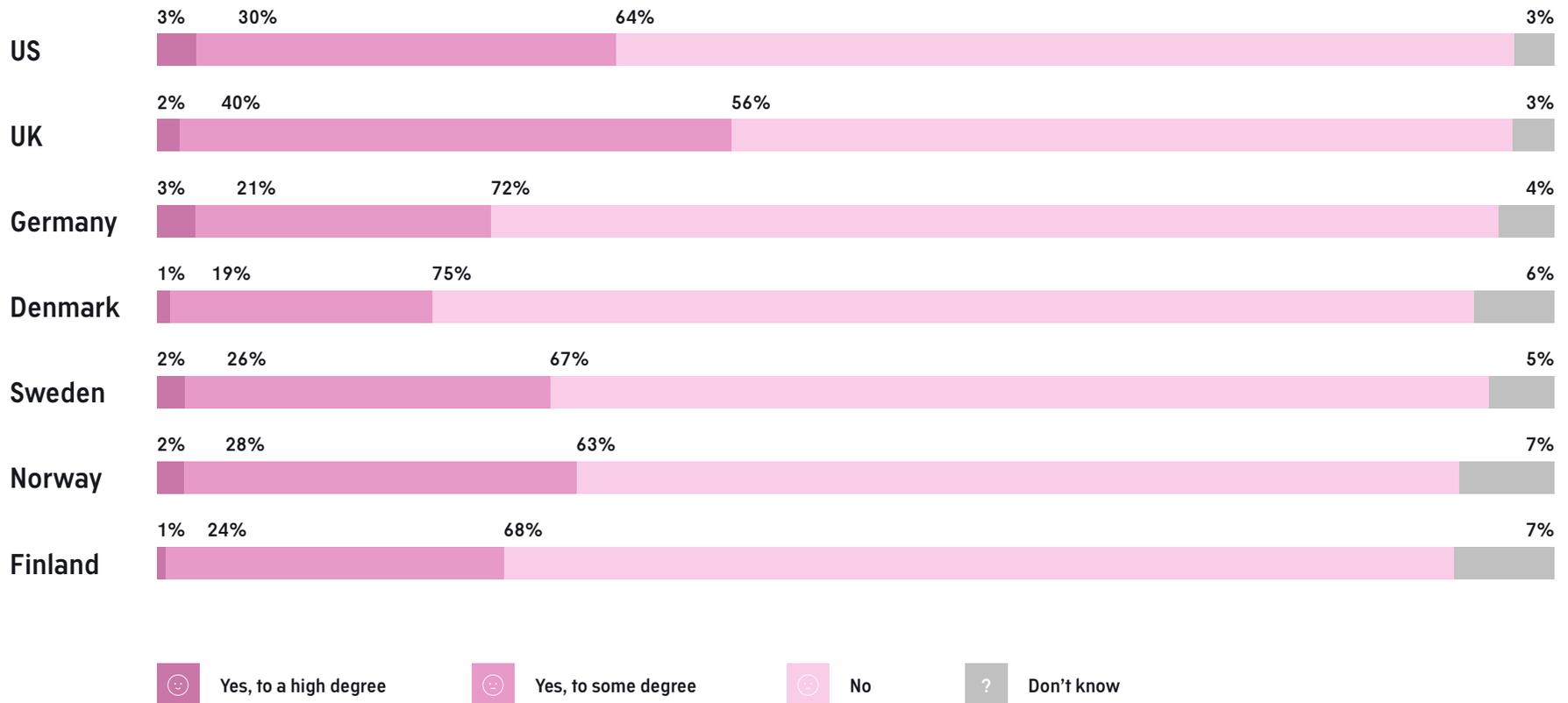
Only half of people see themselves watching traditional TV in 5 years

[How many see themselves watching traditional TV in 5 years?]

US

34%
see themselves
watching traditional
TV in 5 years

- 34%
- 42%
- 24%

UK

58%
see themselves
watching traditional
TV in 5 years

- 58%
- 22%
- 21%

Germany

52%
see themselves
watching traditional
TV in 5 years

- 52%
- 30%
- 19%

■ Yes

■ No

■ Don't know

Denmark

47%
see themselves
watching traditional
TV in 5 years

- 47%
- 34%
- 19%

Sweden

50%
see themselves
watching traditional
TV in 5 years

- 50%
- 26%
- 24%

Norway

49%
see themselves
watching traditional
TV in 5 years

- 49%
- 28%
- 23%

Finland

64%
see themselves
watching traditional
TV in 5 years

- 64%
- 16%
- 20%

More than two-thirds of people use a second screen while watching TV

[How many use other devices while watching TV on a monthly basis?]

US

71%
use other devices
while watching TV

- 71%
- 28%
- 1%

UK

70%
use other devices
while watching TV

- 70%
- 29%
- 0%

Germany

64%
use other devices
while watching TV

- 64%
- 35%
- 1%

- Yes
- No
- Don't know

Denmark

59%
use other devices
while watching TV

- 59%
- 36%
- 5%

Sweden

79%
use other devices
while watching TV

- 79%
- 20%
- 1%

Norway

80%
use other devices
while watching TV

- 80%
- 20%
- 1%

Finland

75%
use other devices
while watching TV

- 75%
- 23%
- 2%

STREAMING

There are some seismic shifts in the streaming section. We see that streaming is here to stay with increasing indications that it is at the expense of traditional TV. And which streaming services are the top choice in each market? Read on!

Streaming increases in all countries but Finland

[How many stream or download TV, series or movies on a weekly basis?]

Legend:
- 2018
- 2019
- 2020

US
- 2018: 60%
- 2019: 63%
- 2020: 80%

UK
- 2018: 49%
- 2019: 57%
- 2020: 77%

Germany
- 2018: 34%
- 2019: 43%
- 2020: 56%

Denmark
- 2018: 40%
- 2019: 53%
- 2020: 61%

Sweden
- 2018: 49%
- 2019: 55%
- 2020: 69%

Norway
- 2018: 58%
- 2019: 59%
- 2020: 74%

Finland
- 2018: 51%
- 2019: 55%
- 2020: 52%
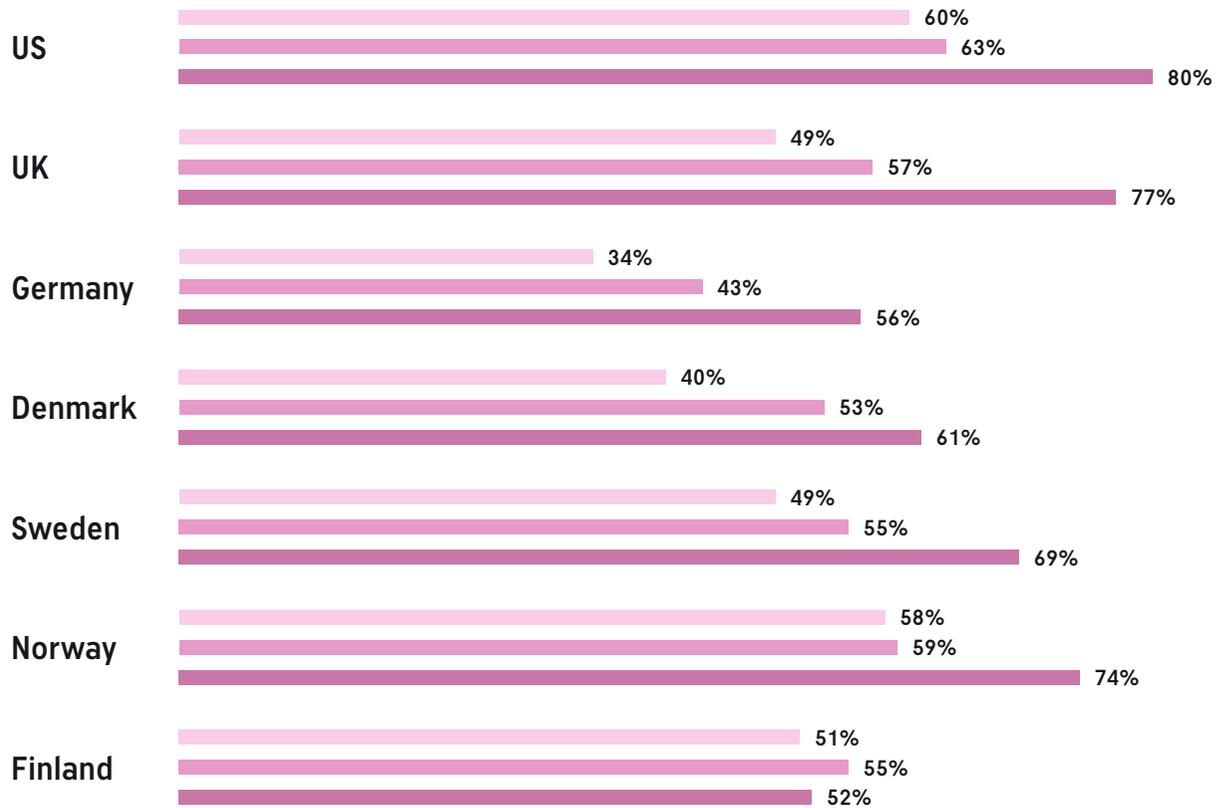
Streaming is more widespread than watching traditional TV among 15-45-year-olds

[How many between 15-45 watch traditional TV and stream or download TV, series or movies on a weekly basis?]

	US	UK	Germany	Denmark	Sweden	Norway	Finland
Watch traditional TV	49%	70%	66%	48%	58%	60%	77%
Stream or download TV, series or movies	81%	86%	77%	81%	78%	82%	67%

Watch traditional TV

Stream or download TV, series or movies
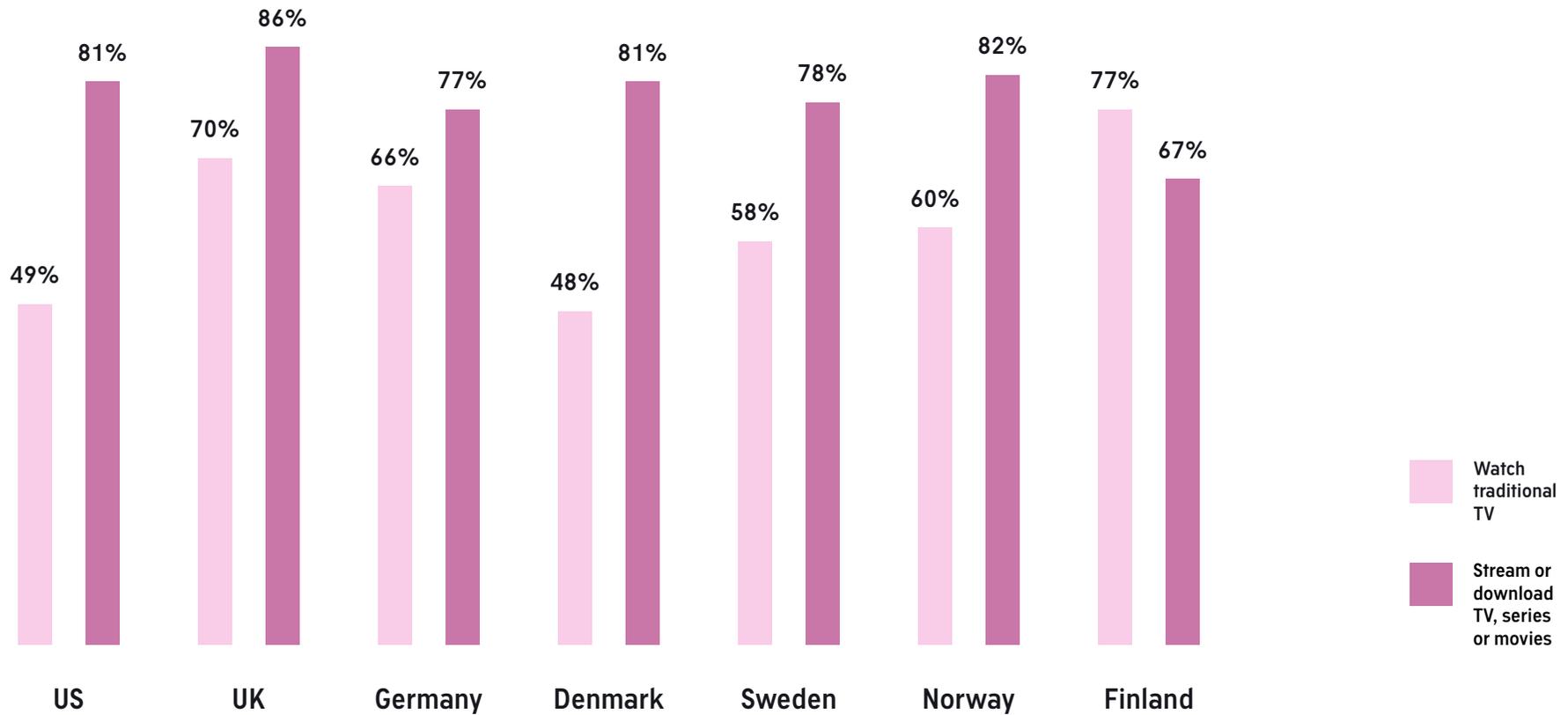
People replace traditional TV with streaming

[How many watch less traditional TV and stream or download more TV, series or movies compared to last year?]

US

26%

15% | 42% | 55% | 8%

UK

27%

18% | 36% | 58% | 6%

Germany

21%

12% | 32% | 37% | 13%

Watch more traditional TV

Don't less traditional TV

Watch less traditional TV and stream or download more TV, series or movies

Stream or download more TV, series or movies

Stream or download less TV, series or movies

Denmark

14%

8% | 27% | 33% | 11%

Sweden

21%

11% | 33% | 45% | 7%

Norway

20%

12% | 34% | 40% | 10%

Finland

9%

14% | 26% | 27% | 12%
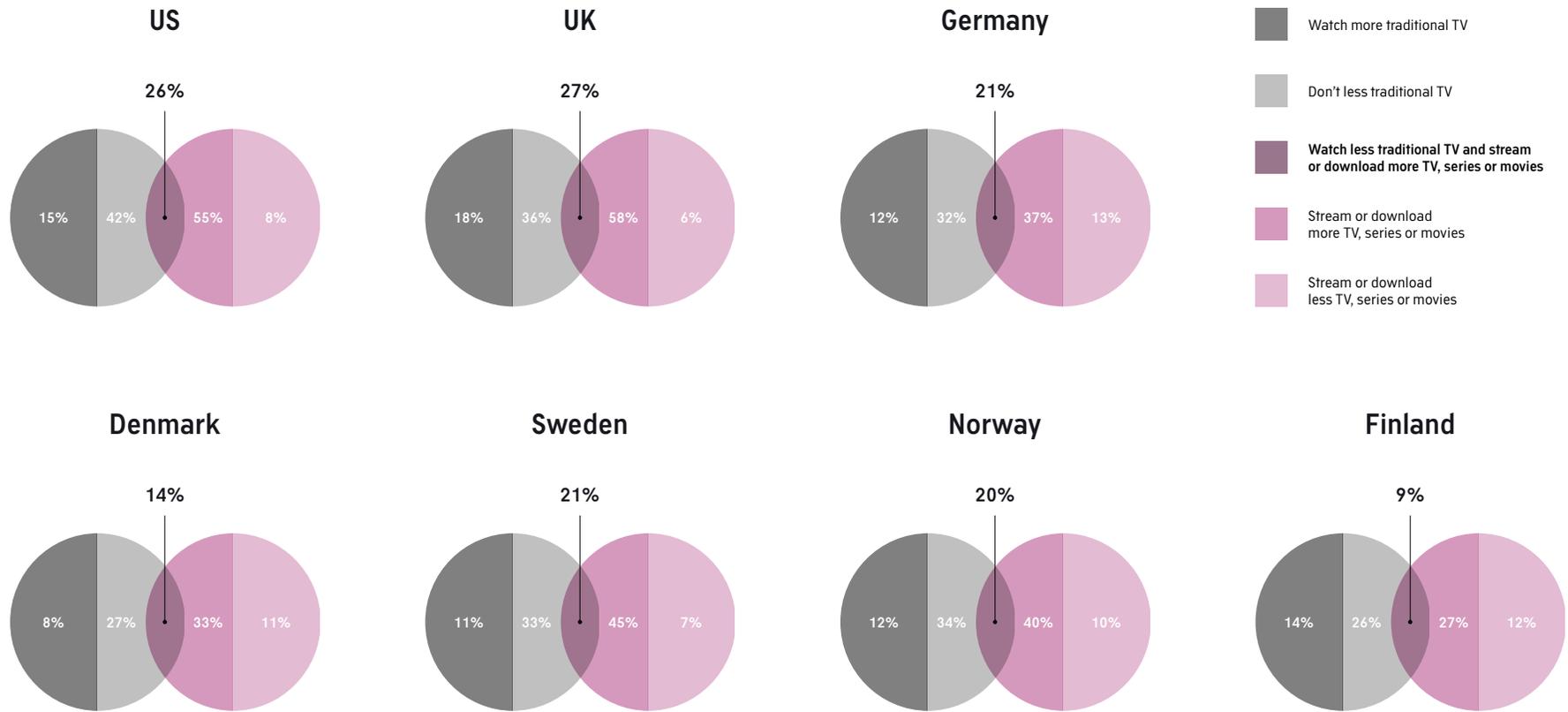
1 out of 5 are pure streamers

[How many don't watch traditional TV but stream or download TV, series or movies?]

US

32%

59% 40% 80% 20%

UK

17%

79% 20% 77% 23%

Germany

15%

79% 20% 56% 43%

- Watch traditional TV
- Don't watch traditional TV
- **Don't watch traditional TV but stream or download TV, series or movies**
- Stream or download TV, series or movies
- Don't stream or download TV, series or movies

Denmark

27%

67% 33% 61% 38%

Sweden

24%

70% 29% 69% 30%

Norway

22%

72% 26% 74% 25%

Finland

9%

84% 15% 52% 48%
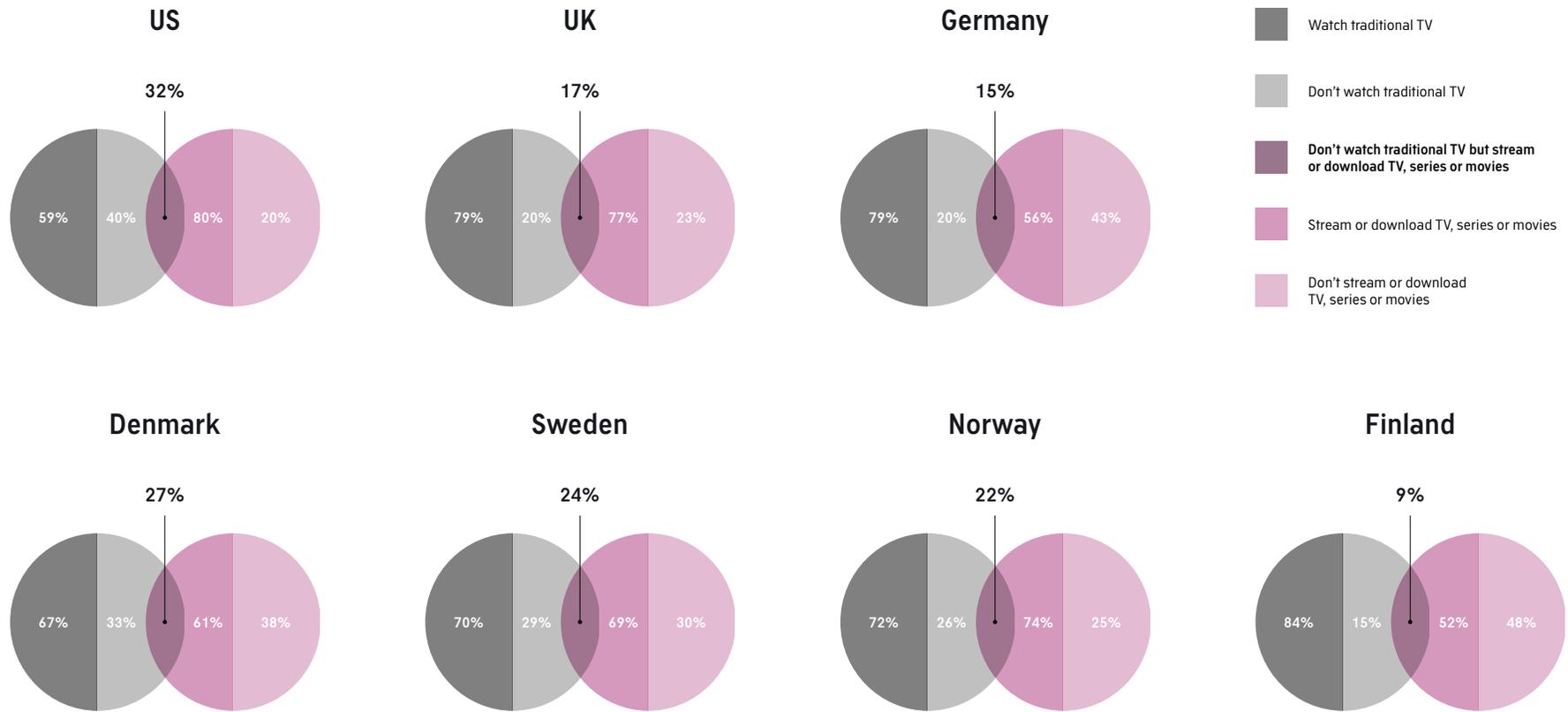
The TV is the go-to device when streaming

[How many use different devices when streaming or downloading TV, series or movies?]

Computer
52% 37% 47% 41% 37% 43% 48%

Tablet
34% 32% 26% 33% 25% 24% 28%

Mobile
43% 33% 37% 36% 42% 37% 45%

TV
58% 64% 57% 56% 47% 56% 59%

Connected TV
40% 34% 28% 31% 43% 39% 26%

Video game console
12% 15% 12% 6% 5% 10% 13%
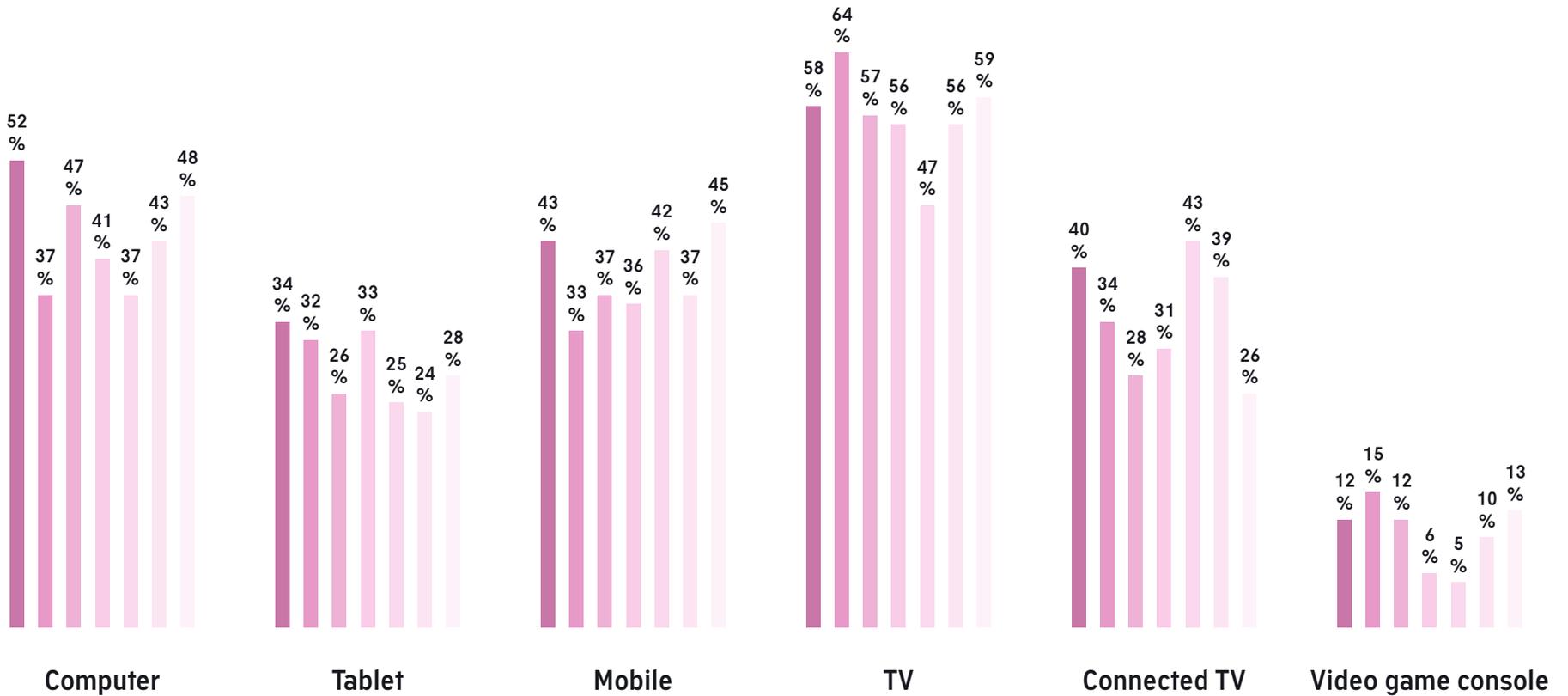
Disney+ is the third most used subscription-based streaming service in the US

[How many Americans use different streaming and downloading services to watch TV, series or movies?]

2018
2019
2020

Prefer the streaming service

Subscribe to the streaming service

Note: The figures represent how many of the ones who have used a streaming or downloading service to watch TV, series or movies within the last week that use, prefer and subscribe to the different services.

	Netflix	Amazon Prime Video	YouTube	Disney+	Hulu	HBO Max	Apple TV+	CBS All Access	YouTube Premium	HBO	Facebook Watch	iTunes	Google Play	BritBox	Sling	Other
2018	79%	55%	53%	-	40%	-	-	-	-	11%	9%	10%	10%	-	6%	11%
2019	80%	60%	48%	-	44%	-	-	-	9%	11%	9%	7%	9%	-	5%	9%
2020	81%	68%	59%	44%	42%	18%	14%	9%	9%	8%	7%	6%	5%	4%	4%	10%
Prefer	44%	18%	8%	3%	11%	2%	1%	1%	4%	0%	0%	-	-	1%	1%	3%
Subscribe	79%	79%	-	44%	44%	20%	16%	11%	10%	N/A	-	-	-	4%	4%	8%

Amazon Prime's popularity grows rapidly in the UK

[How many Brits use different streaming and downloading services to watch TV, series or movies?]

Prefer the streaming service

Subscribe to the streaming service

Note: The figures represent how many of the ones who have used a streaming or downloading service to watch TV, series or movies within the last week that use, prefer and subscribe to the different services.

	Netflix	Amazon Prime Video	BBC iPlayer	YouTube	All 4	Disney+	ITV Hub	Sky Go	NOW TV	Apple TV+	Facebook Watch	BritBox	Sky Store Player	YouTube Premium	iTunes	Google Play	Rakuten TV	TalkTalk TV	Other
2018	70%	44%	61%	43%	28%	-	29%	13%	15%	-	-	-	6%	-	5%	6%	-	2%	5%
2019	75%	50%	60%	39%	29%	-	29%	14%	16%	-	3%	-	6%	2%	3%	4%	1%	2%	5%
2020	84%	67%	62%	49%	35%	26%	26%	15%	12%	6%	4%	4%	3%	3%	3%	1%	-	1%	3%
Prefer the streaming service	58%	11%	10%	6%	2%	2%	0%	3%	3%	0%	0%	0%	-	0%	-	-	0%	-	0%
Subscribe to the streaming service	83%	71%	-	-	22%	31%	19%	19%	13%	7%	-	4%	-	3%	-	-	1%	-	2%

Amazon Prime narrows the gap to Netflix in Germany

[How many Germans use different streaming and downloading services to watch TV, series or movies?]

Legend: 2018, 2019, 2020

○ Prefer the streaming service
● Subscribe to the streaming service

Note: The figures represent how many of the ones who have used a streaming or downloading service to watch TV, series or movies within the last week that use, prefer and subscribe to the different services.

Service	2018	2019	2020	Prefer	Subscribe
Netflix	57%	69%	70%	52%	68%
Amazon Prime Video	55%	59%	65%	25%	69%
YouTube	53%	52%	58%	9%	-
Disney+	-	-	19%	2%	23%
Joyn	-	-	10%	2%	5%
Sky Ticket	11%	9%	9%	3%	10%
Zattoo	5%	3%	4%	1%	3%
Apple TV+	-	-	4%	0%	4%
Google Play	7%	6%	3%	-	-
Facebook Watch	-	-	3%	1%	-
Netzkino	-	-	3%	0%	1%
iTunes	5%	4%	2%	-	-
YouTube Premium	-	-	2%	1%	3%
Maxdome	6%	7%	2%	-	-
Video-buster	1%	1%	-	0%	0%
Videoload	-	-	1%	-	-
Rakuten TV	-	0%	-	0%	1%
Other	11%	11%	10%	3%	10%

TV 2 Play becomes the third most popular streaming service in Denmark

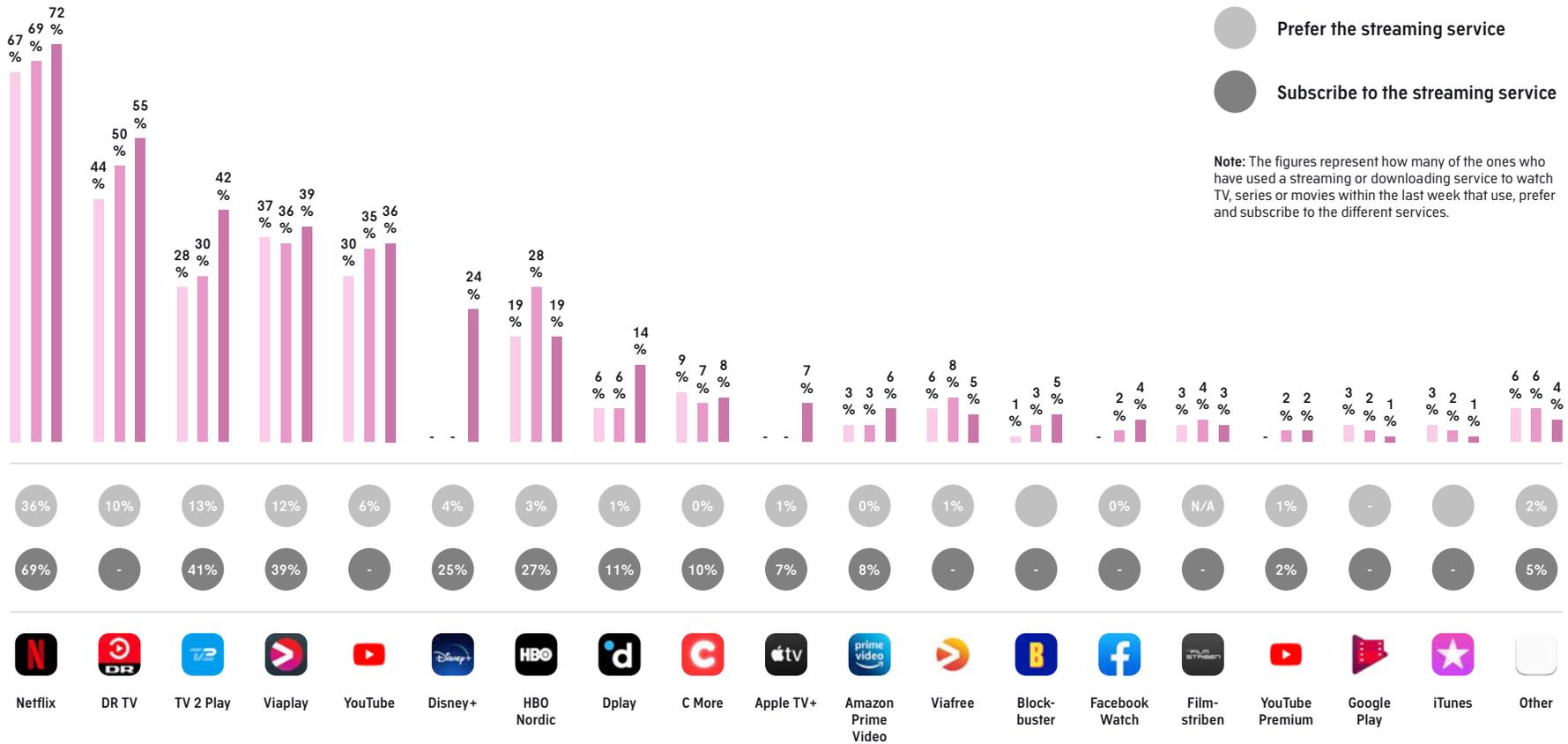[How many Danes use different streaming and downloading services to watch TV, series or movies?]

Prefer the streaming service

Subscribe to the streaming service

Note: The figures represent how many of the ones who have used a streaming or downloading service to watch TV, series or movies within the last week that use, prefer and subscribe to the different services.

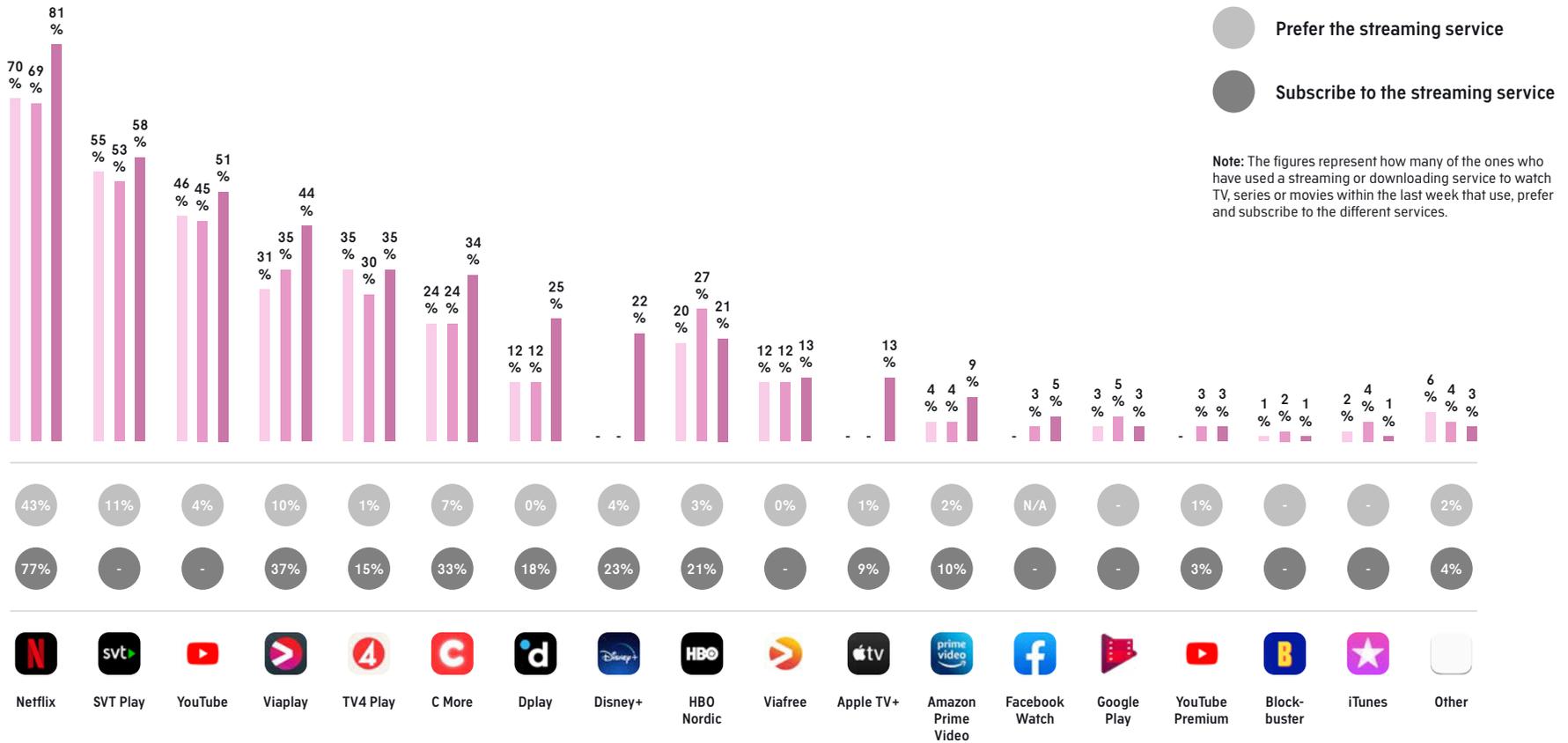|	Netflix	DR TV	TV 2 Play	Viaplay	YouTube	Disney+	HBO Nordic	Dplay	C More	Apple TV+	Amazon Prime Video	Viafree	Block-buster	Facebook Watch	Film-striben	YouTube Premium	Google Play	iTunes	Other
2018	67%	44%	28%	37%	30%	-	19%	6%	9%	-	3%	6%	1%	-	3%	-	3%	3%	6%
2019	69%	50%	30%	36%	35%	-	28%	6%	7%	-	3%	8%	3%	2%	4%	2%	2%	2%	6%
2020	72%	55%	42%	39%	36%	24%	19%	14%	8%	7%	6%	5%	5%	4%	3%	2%	1%	1%	4%
Prefer	36%	10%	13%	12%	6%	4%	3%	1%	0%	1%	0%	1%		0%	N/A	1%	-	-	2%
Subscribe	69%	-	41%	39%	-	25%	27%	11%	10%	7%	8%	-	-	-	-	2%	-	-	5%

Netflix expands its lead to its competitors in Sweden

[How many Swedes use different streaming and downloading services to watch TV, series or movies?]
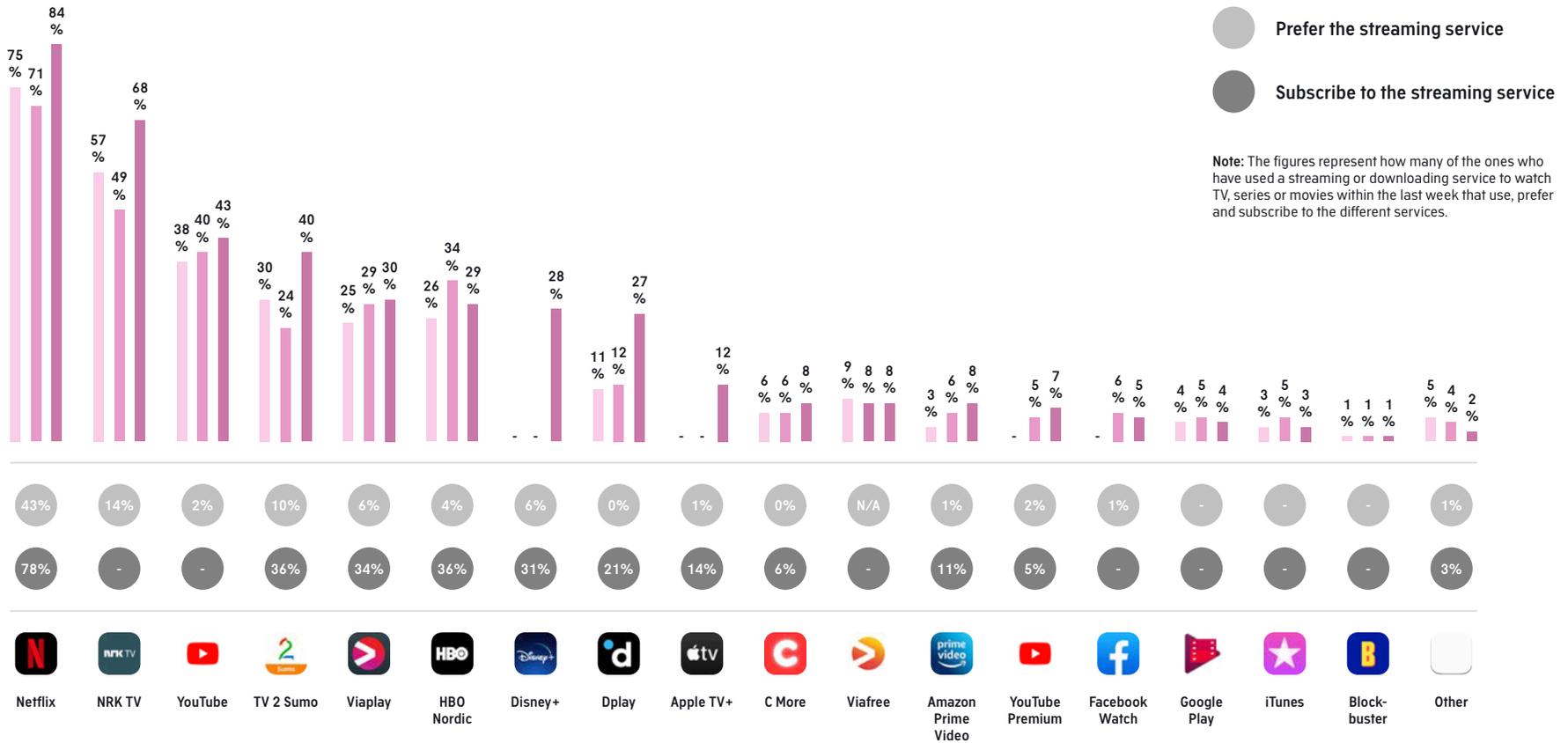
■ 2018
■ 2019
■ 2020

● Prefer the streaming service

● Subscribe to the streaming service

Note: The figures represent how many of the ones who have used a streaming or downloading service to watch TV, series or movies within the last week that use, prefer and subscribe to the different services.

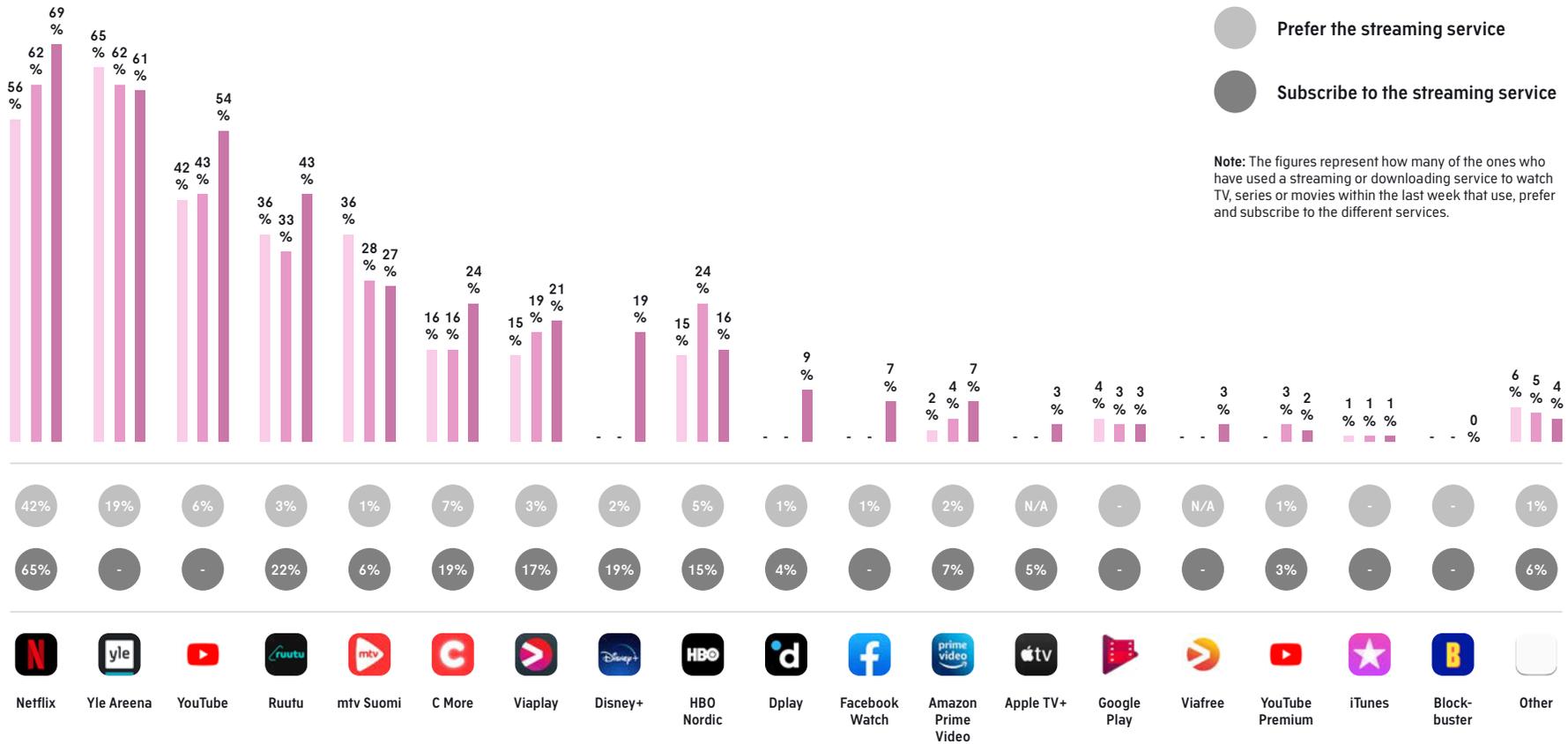|	Netflix	SVT Play	YouTube	Viaplay	TV4 Play	C More	Dplay	Disney+	HBO Nordic	Viafree	Apple TV+	Amazon Prime Video	Facebook Watch	Google Play	YouTube Premium	Block-buster	iTunes	Other
2018	70%	55%	46%	31%	35%	24%	12%	-	20%	12%	-	4%	-	3%	-	1%	2%	6%
2019	69%	53%	45%	35%	30%	24%	12%	-	27%	12%	-	4%	3%	5%	3%	2%	4%	4%
2020	81%	58%	51%	44%	35%	34%	25%	22%	21%	13%	13%	9%	5%	3%	3%	1%	1%	3%
Prefer	43%	11%	4%	10%	1%	7%	0%	4%	3%	0%	1%	2%	N/A	-	1%	-	-	2%
Subscribe	77%	-	-	37%	15%	33%	18%	23%	21%	-	9%	10%	-	-	3%	-	-	4%

NRK TV grows in popularity, but Netflix is still number one in Norway

[How many Norwegians use different streaming and downloading services to watch TV, series or movies?]

⬤ Prefer the streaming service

⬤ Subscribe to the streaming service

Note: The figures represent how many of the ones who have used a streaming or downloading service to watch TV, series or movies within the last week that use, prefer and subscribe to the different services.

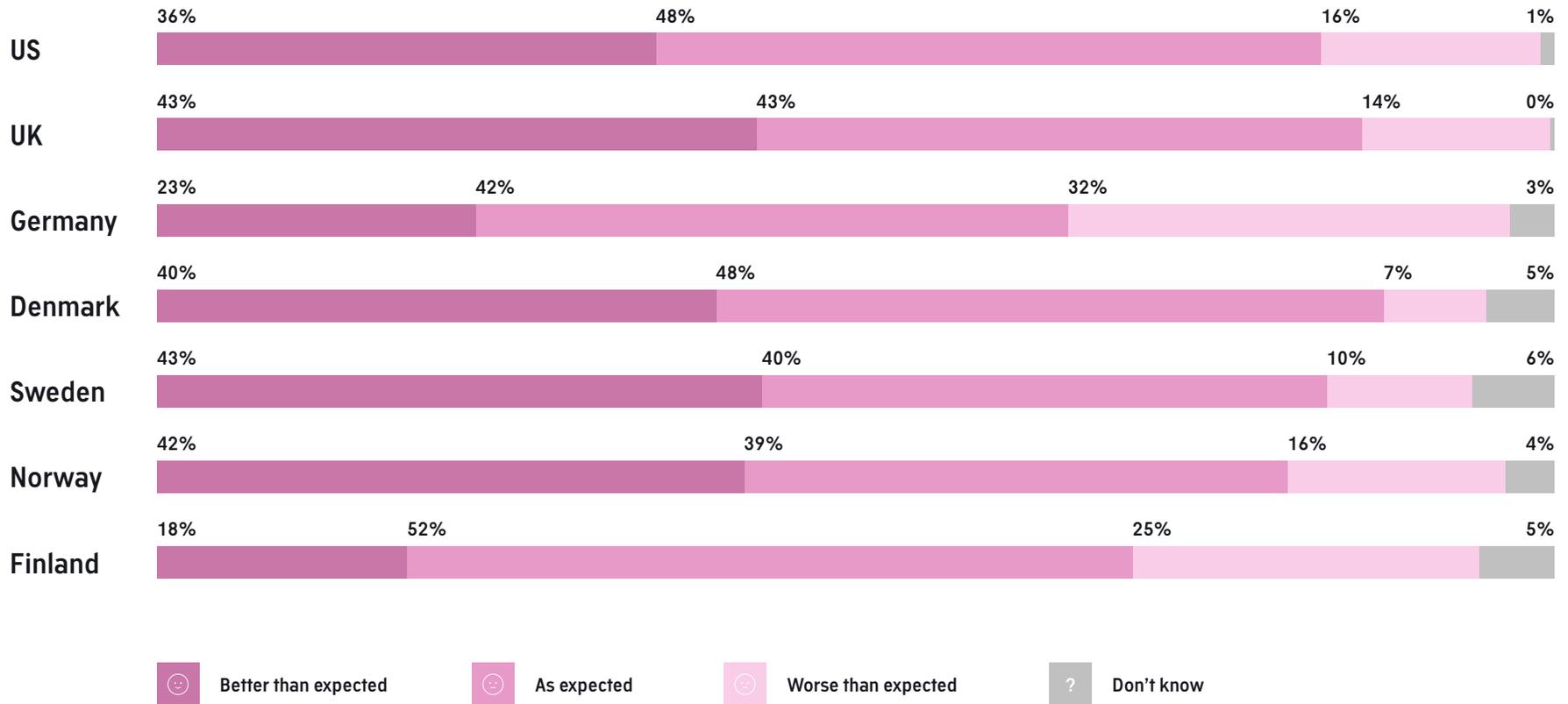|	Netflix	NRK TV	YouTube	TV 2 Sumo	Viaplay	HBO Nordic	Disney+	Dplay	Apple TV+	C More	Viafree	Amazon Prime Video	YouTube Premium	Facebook Watch	Google Play	iTunes	Block-buster	Other
Prefer	43%	14%	2%	10%	6%	4%	6%	0%	1%	0%	N/A	1%	2%	1%	-	-	-	1%
Subscribe	78%	-	-	36%	34%	36%	31%	21%	14%	6%	-	11%	5%	-	-	-	-	3%

Netflix becomes the most popular streaming service in Finland

[How many Finns use different streaming and downloading services to watch TV, series or movies?]

2018
2019
2020

Prefer the streaming service

Subscribe to the streaming service

Note: The figures represent how many of the ones who have used a streaming or downloading service to watch TV, series or movies within the last week that use, prefer and subscribe to the different services.

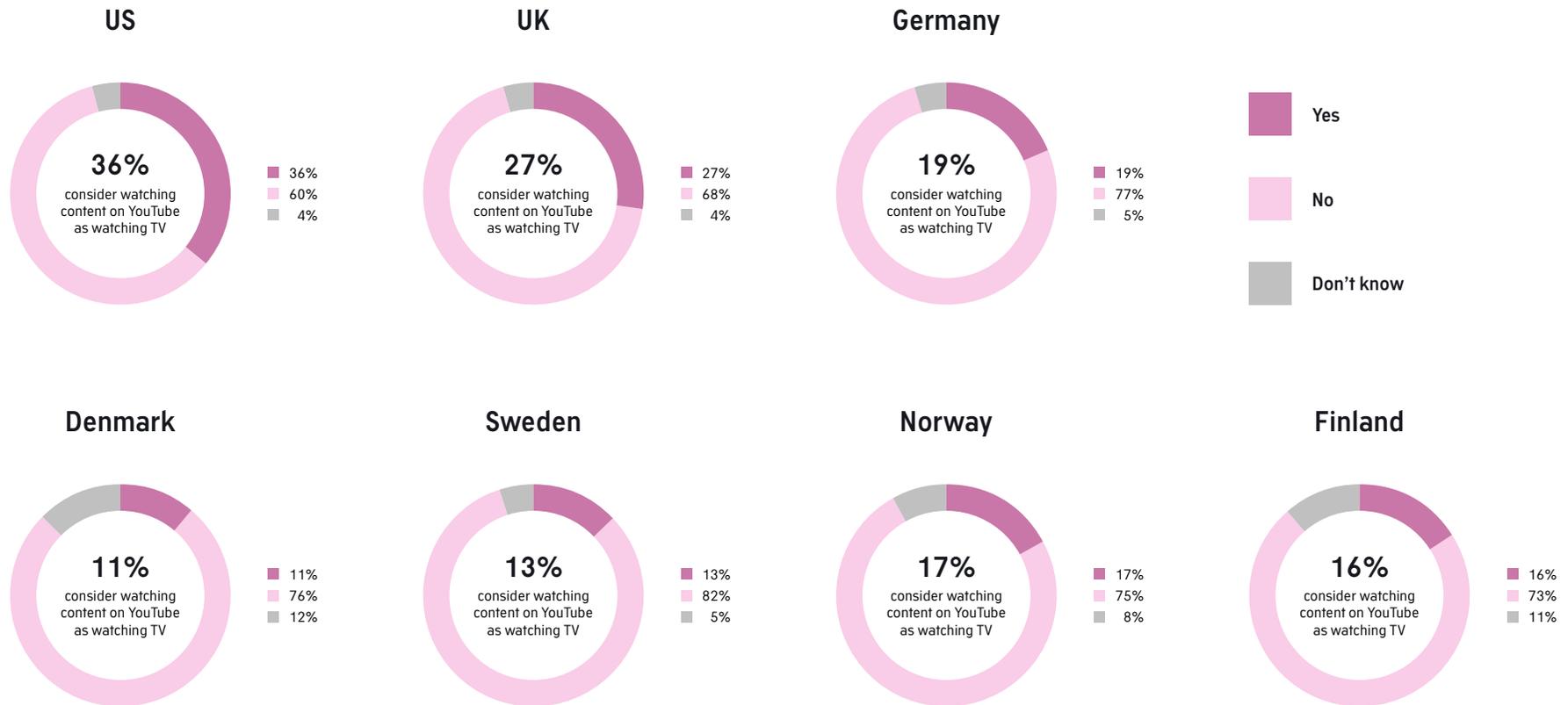|	Netflix	Yle Areena	YouTube	Ruutu	mtv Suomi	C More	Viaplay	Disney+	HBO Nordic	Dplay	Facebook Watch	Amazon Prime Video	Apple TV+	Google Play	Viafree	YouTube Premium	iTunes	Block-buster	Other
Prefer	42%	19%	6%	3%	1%	7%	3%	2%	5%	1%	1%	2%	N/A	-	N/A	1%	-	-	1%
Subscribe	65%	-	-	22%	6%	19%	17%	19%	15%	4%	-	7%	5%	-	-	3%	-	-	6%

One-third of Disney+ subscribers think the streaming service is better than expected

[How many Disney+ subscribers think that the streaming service has lived up to their expectations?]

	Better than expected	As expected	Worse than expected	Don't know
US	36%	48%	16%	1%
UK	43%	43%	14%	0%
Germany	23%	42%	32%	3%
Denmark	40%	48%	7%	5%
Sweden	43%	40%	10%	6%
Norway	42%	39%	16%	4%
Finland	18%	52%	25%	5%

☺ Better than expected   ☺ As expected   ☺ Worse than expected   ? Don't know

More than one-third in the US consider watching content on YouTube as watching TV

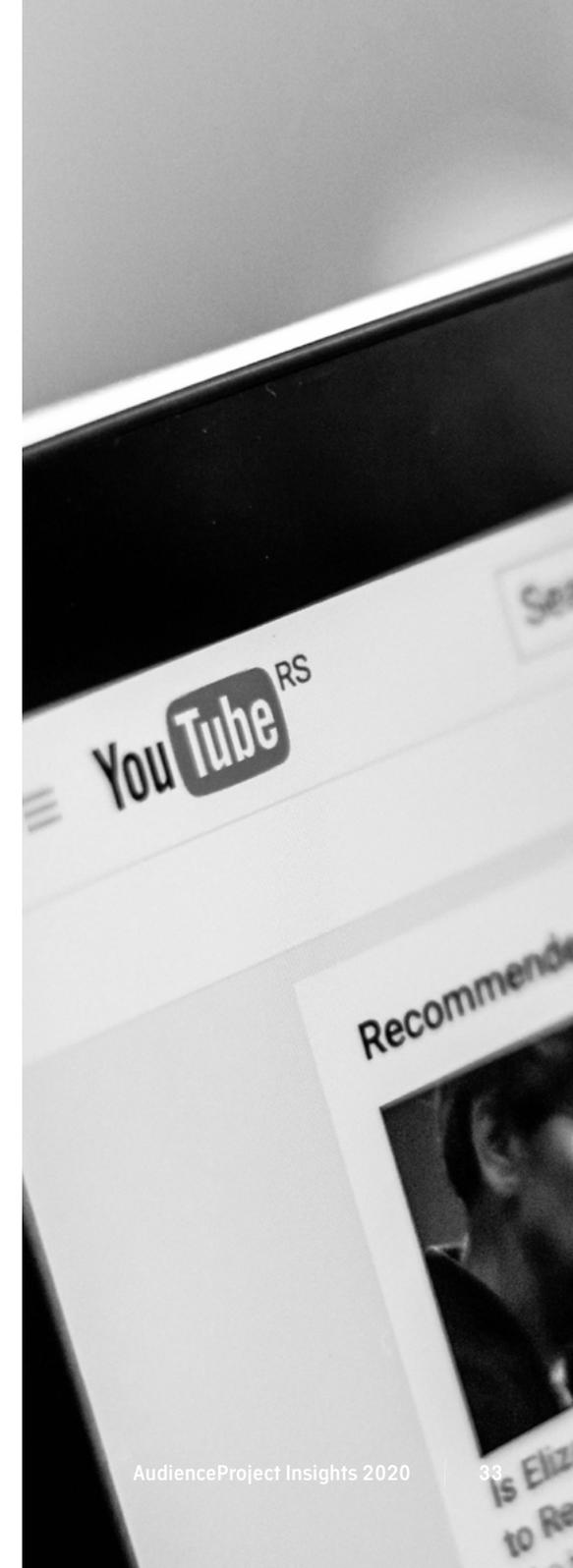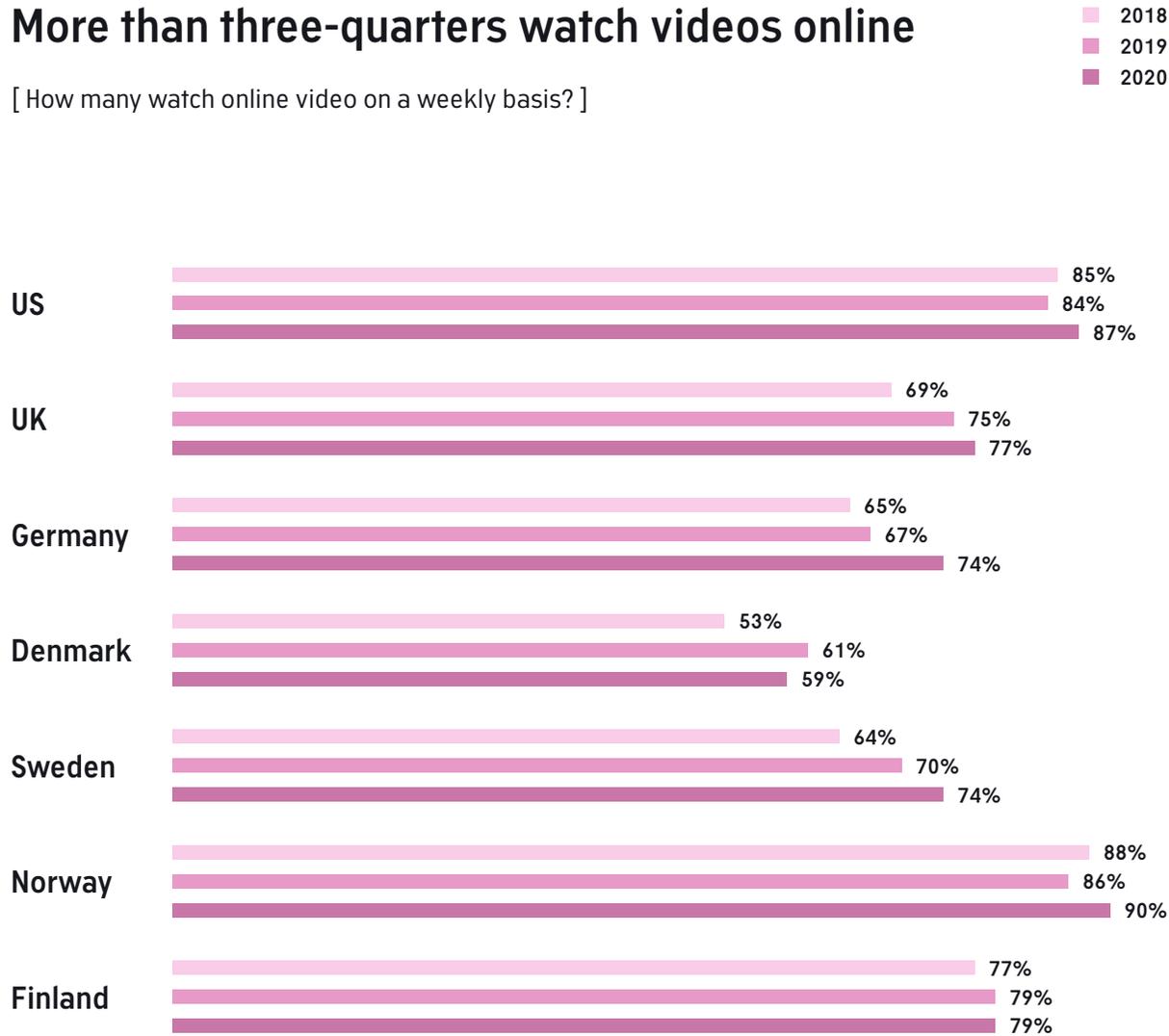[How many consider watching content on YouTube as watching TV?]

US

36%
consider watching
content on YouTube
as watching TV

- 36%
- 60%
- 4%

UK

27%
consider watching
content on YouTube
as watching TV

- 27%
- 68%
- 4%

Germany

19%
consider watching
content on YouTube
as watching TV

- 19%
- 77%
- 5%

■ Yes

■ No

■ Don't know

Denmark

11%
consider watching
content on YouTube
as watching TV

- 11%
- 76%
- 12%

Sweden

13%
consider watching
content on YouTube
as watching TV

- 13%
- 82%
- 5%

Norway

17%
consider watching
content on YouTube
as watching TV

- 17%
- 75%
- 8%

Finland

16%
consider watching
content on YouTube
as watching TV

- 16%
- 73%
- 11%

The use of connected TV boxes increases

[How many watch TV via connected TV boxes on a weekly basis?]

Legend:
- 2018
- 2019
- 2020

US
- 47%
- 50%
- 49%

UK
- 35%
- 42%
- 42%

Germany
- 26%
- 31%
- 37%

Denmark
- 23%
- 35%
- 38%

Sweden
- 41%
- 44%
- 53%

Norway
- 41%
- 44%
- 50%

Finland
- 21%
- 24%
- 28%
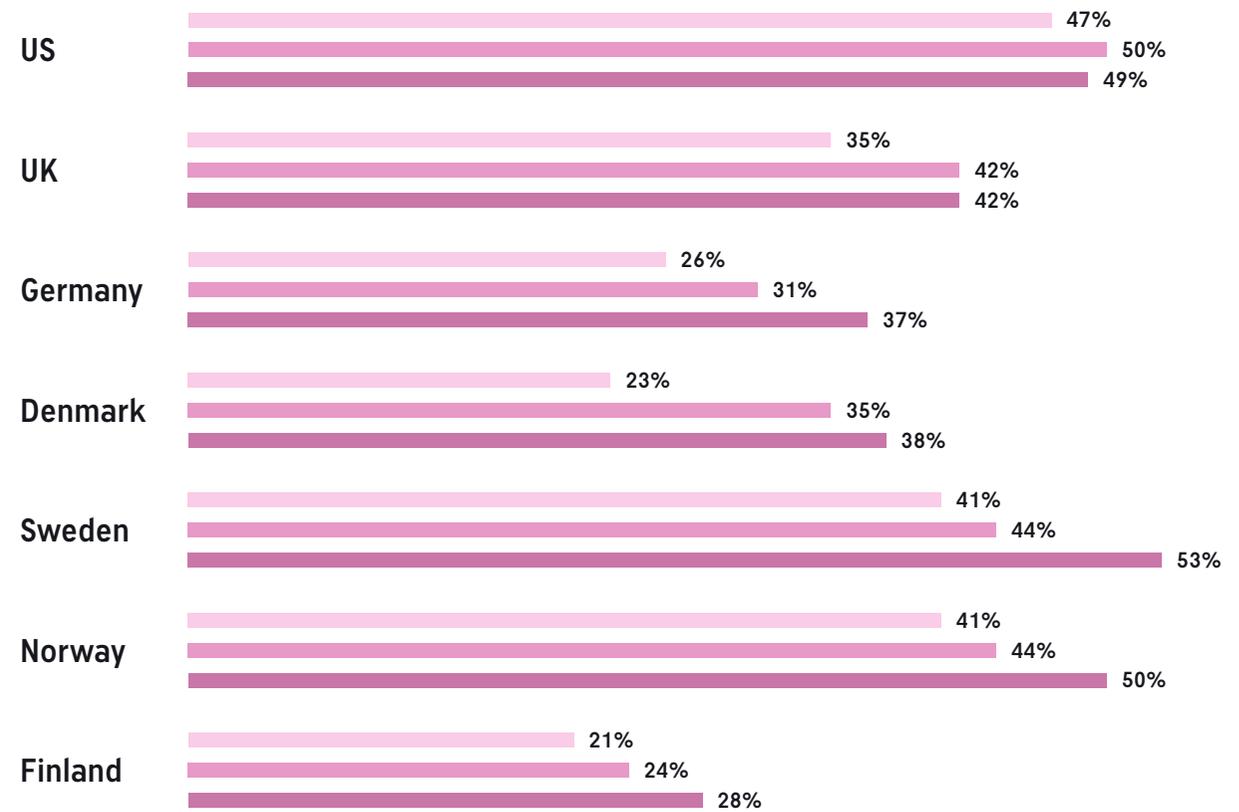
More than three-quarters watch videos online

[How many watch online video on a weekly basis?]

Legend:
- 2018
- 2019
- 2020

US
- 85%
- 84%
- 87%

UK
- 69%
- 75%
- 77%

Germany
- 65%
- 67%
- 74%

Denmark
- 53%
- 61%
- 59%

Sweden
- 64%
- 70%
- 74%

Norway
- 88%
- 86%
- 90%

Finland
- 77%
- 79%
- 79%

ABOUT THE STUDY

Further insights
This is just the tip of the iceberg. AudienceProject has in-depth data on the digital market. For more in-depth data about traditional TV and streaming - or other digital trends, please reach out to us.

Methodology
The study is a part of AudienceProject Insights 2020. Data is collected through online surveys done in Q4 2020. The respondents have been selected from our Nordic, German, UK and US panels consisting of more than 1.5 million panelists and weighed to achieve representativity on the more than 7.000 respondents who completed the survey.

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About AudienceProject

AudienceProject is a technology-based market research company founded in Denmark and operational worldwide that helps publishers, agencies and advertisers identify, build, reach and measure audiences.

AudienceProject empowers publishers, agencies and advertisers to collect and activate their own audience data, so they can create unique data offerings and show advertisers the true value of omnichannel marketing.