

Streaming TV's New Era

How Ads Are Powering
Streaming's Future in the EU5

Magnite Research, 2023

Magnite

EU5 Streaming Report (All Countries)

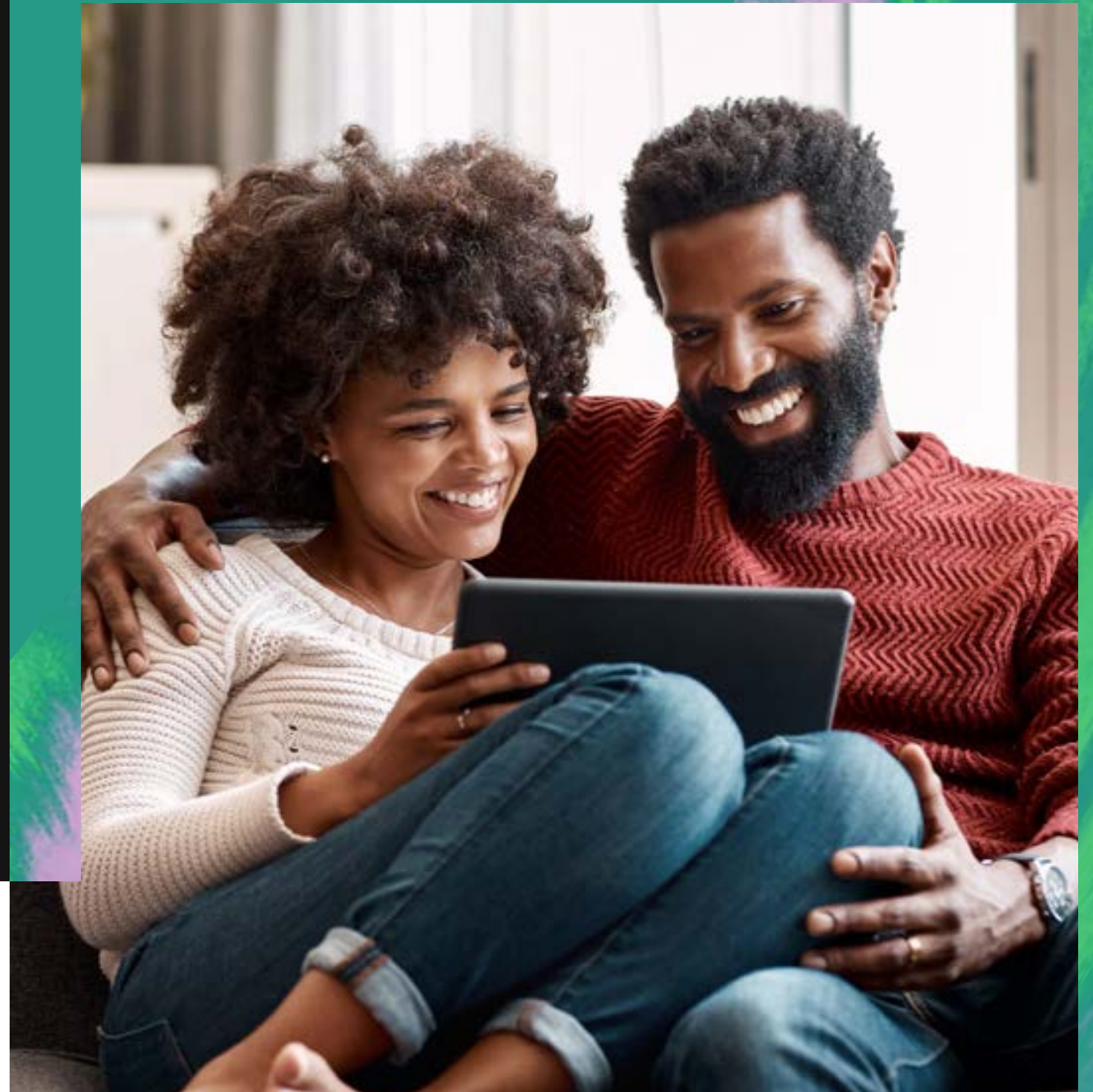


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Introduction

Streaming TV has emerged as the future of television. As traditional TV viewers transition to streaming content on multiple device types, streaming TV has evolved to reflect the needs of today's consumers.

Broadcasters, media owners, and advertisers are aligning content with consumer preferences to provide adaptive offerings with ad-supported content leading the way.

Magnite plays a key role at the intersection of advertising and consumer experience and is uniquely positioned to provide this report, "Streaming TV's New Era," which focuses on how consumer attitudes and viewing habits are reshaping the TV landscape — and how ads are powering streaming's future.

Ad-supported streaming TV is now watched more than ad-free streaming, and is where the majority of growth will come from. 76% of streamers are likely to use a new ad-supported streaming service in the next year.



JULIE SELMAN
SVP, HEAD OF EMEA, MAGNITE





Methodology

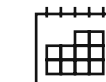
Magnite's 2023 Report "Streaming TV's New Era" puts audiences front and centre, examining how consumer attitudes and viewing habits are reshaping the streaming landscape.

As streaming undergoes a marked shift to ad-supported environments, it's crucial for advertisers and media platforms to more fully grasp audience viewing behaviour to meet greater demand, impactfully engage with viewers, and seize the streaming opportunity.

Magnite engaged Harris Interactive to execute an online survey of 5,306 respondents across the **EU5: UK, Spain, Italy, Germany, and France**.



The respondents are people ages 16–74 who watch 7+ hours of TV a week



Fieldwork: December 22, 2022 – January 11, 2023

Glossary of Terms

Streaming TV

All television content streamed via the internet regardless of the device it is watched on (CTV and OTT)

Streamers

Audiences that stream TV content to any device type

Paid Traditional TV

Cable/Satellite/IPTV (TV content received through a paid subscription or a Telecom service)

Broadcast TV

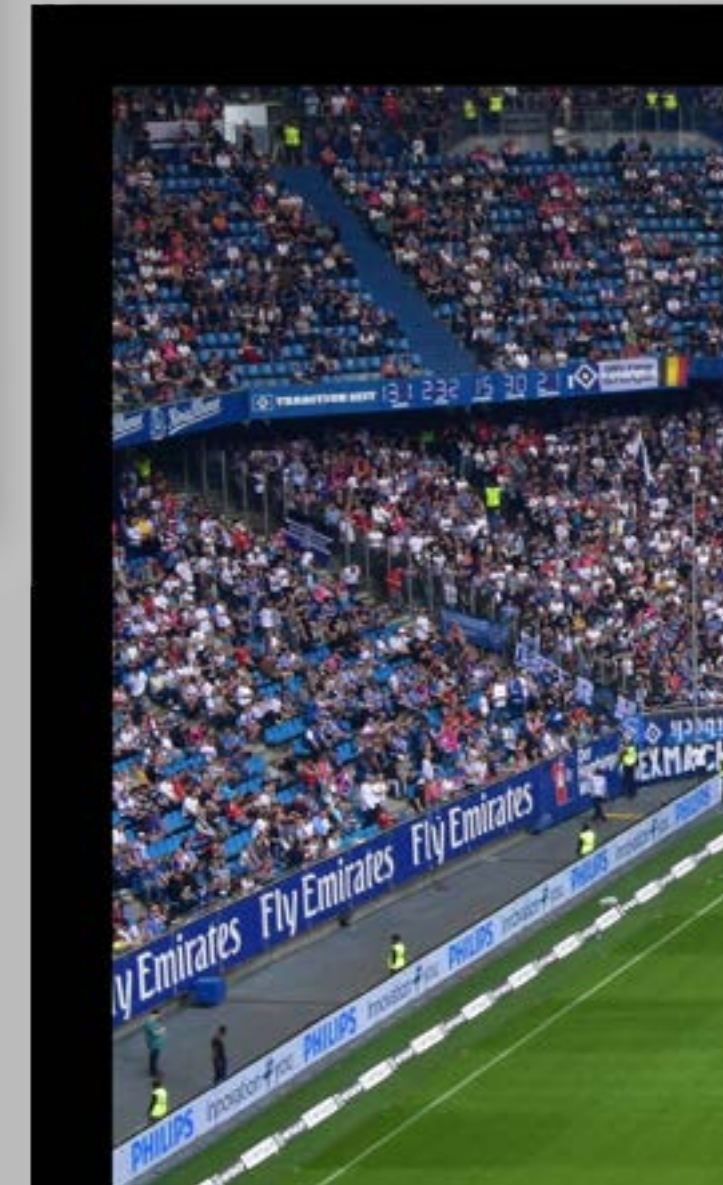
TV content watched through an over-the-air receiver

Traditional TV

The combination of Paid Traditional TV and Broadcast TV

EU5 markets

UK, Italy, France, Germany, and Spain



Key Takeaways

Streaming TV is changing the way audiences watch television content. Most streamers already watch content with ads and as the number of ad-supported viewers continues to grow, their deep engagement and cross-device consumption habits will lead to better results for brands.



1

Ad-supported streaming TV is more popular than ad-free—and it's powering streaming's growth.

82% of streamers are watching with ads and a majority of viewers have a preference for ad-based content.

2

Ads do not negatively impact the viewing experience.

Ad-supported streaming TV viewers are watching just as many hours of TV as ad-free viewers (16 hours) each week.

3

Economic conditions are encouraging streamers to reevaluate the types of subscriptions they have.

76% said they would use a new free or reduced-cost ad-based streaming service.

4

Streaming TV is more effective than social video.

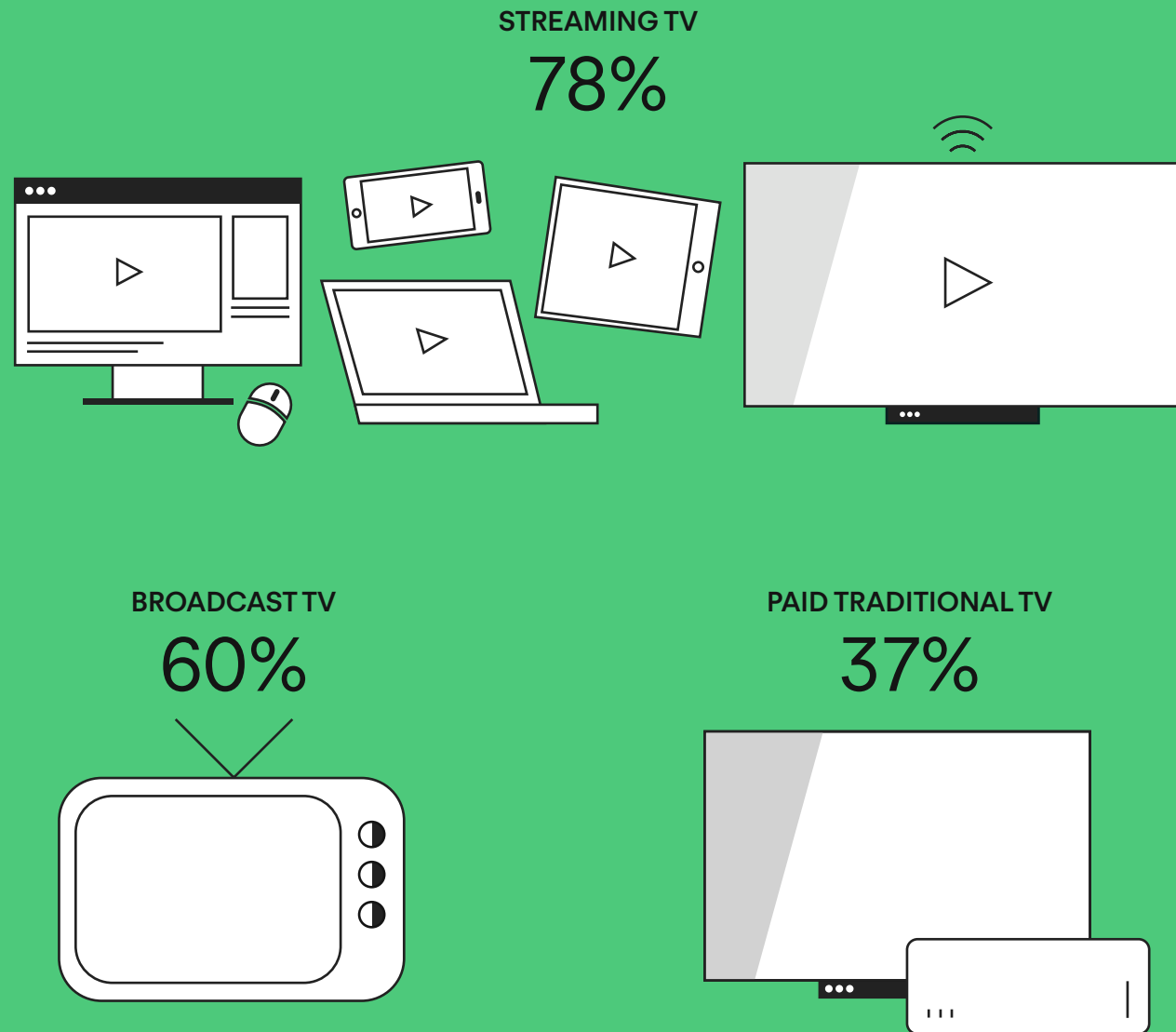
Streaming TV's immersive environment generates greater recall, 62% recall ads on TV while only 19% recall ads on social media.

5

Exposure to brands across multiple devices drives stronger connections.

75% of ad-supported streamers are more likely to make a purchase from a brand that they engaged with across multiple devices.

Streaming TV is the most watched form of TV



Streaming TV viewership continues to grow and evolve.



Streaming TV is now watched more than any other form of television in the EU5.

With the expansion of streaming offerings and a continued rise in viewership, internet-delivered content across multiple devices looks to be the future of TV viewing.

This shift shows no signs of slowing down. Among those who only watch traditional TV, **40% are likely to start watching streaming TV** in the next 6–12 months.

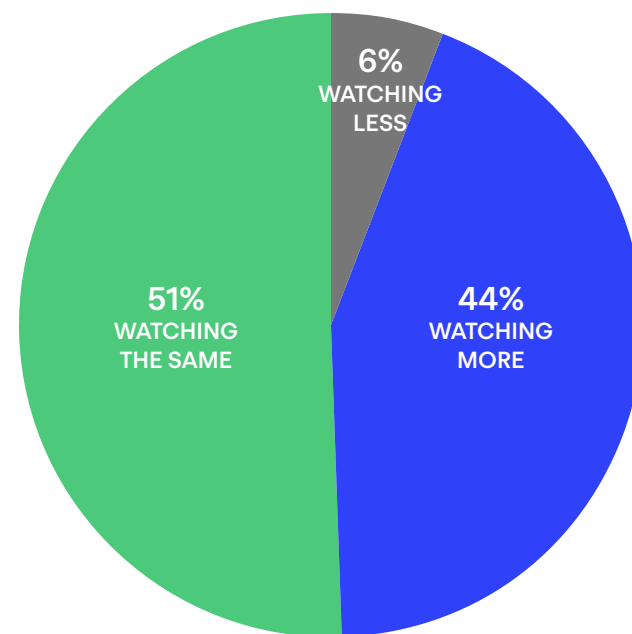
Q: Which of these following services do you use to watch TV shows and films?
Base: Total respondents
Source: Magnite

Viewers are watching more streaming TV now versus a year ago.

Streamers' appetite for content continues to grow.

According to our research, **44% of streamers are watching more streaming TV this year** than last, 51% are watching the same, while only 6% are watching less.

Streamers' viewing habits are increasing



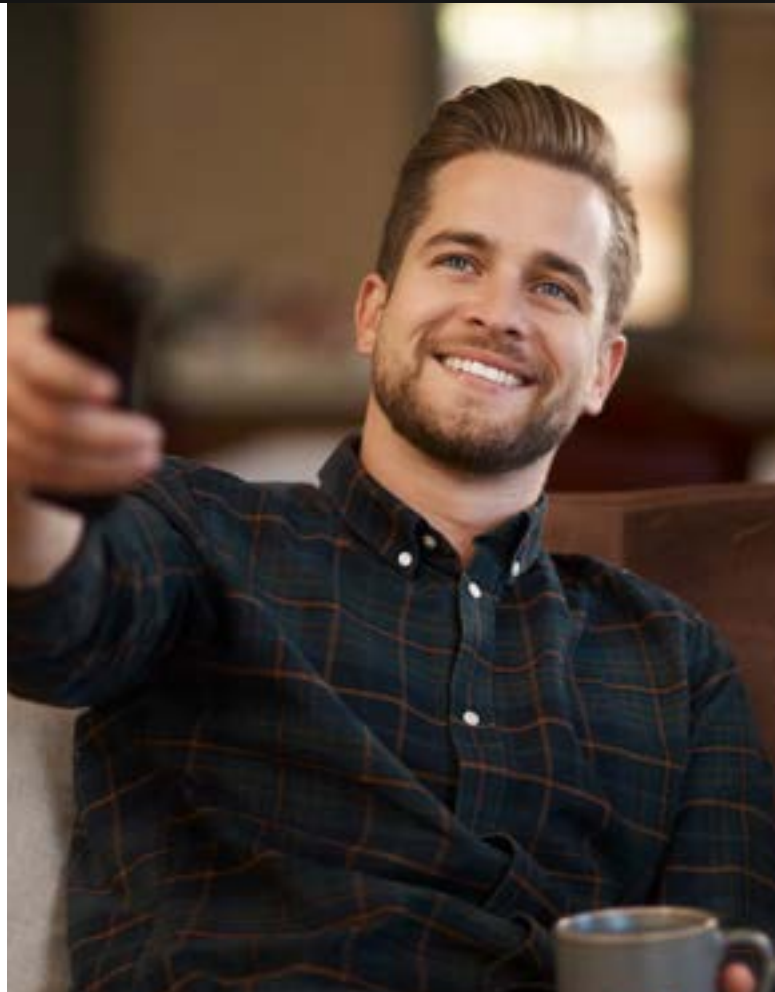
Q: Compared to one year ago, are you watching more or less streaming TV content, or has the amount remained the same?
Base: Total streamers
Source: Magnite



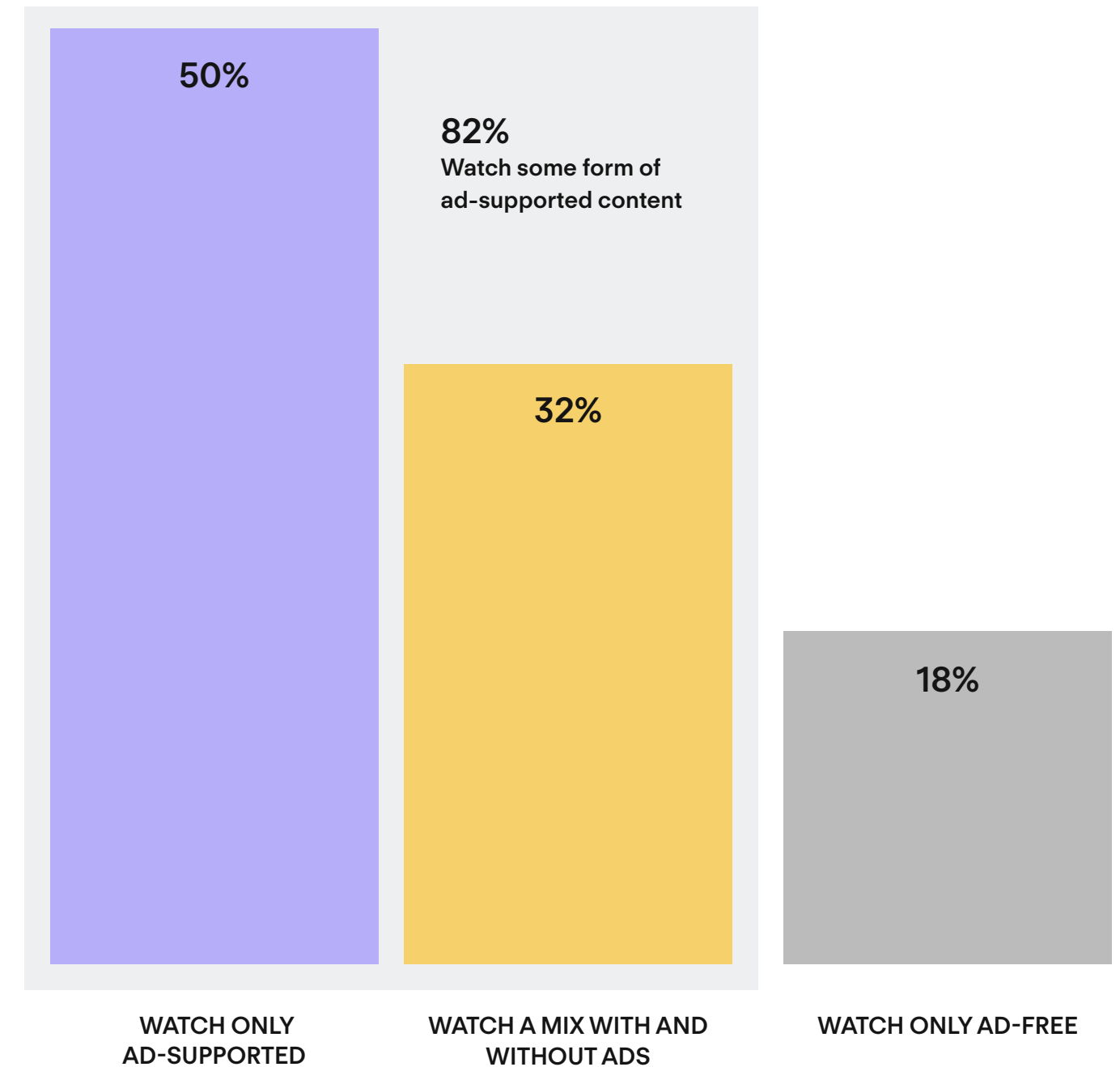
Ad-supported streaming is the preferred choice for consumers.

Audiences are enjoying more choices in how they consume content.

While streamers in the EU5 are watching a mix of ad-supported and ad-free content, our research shows that **ad-supported is considerably more popular.**



8 in 10 streamers watch content with ads

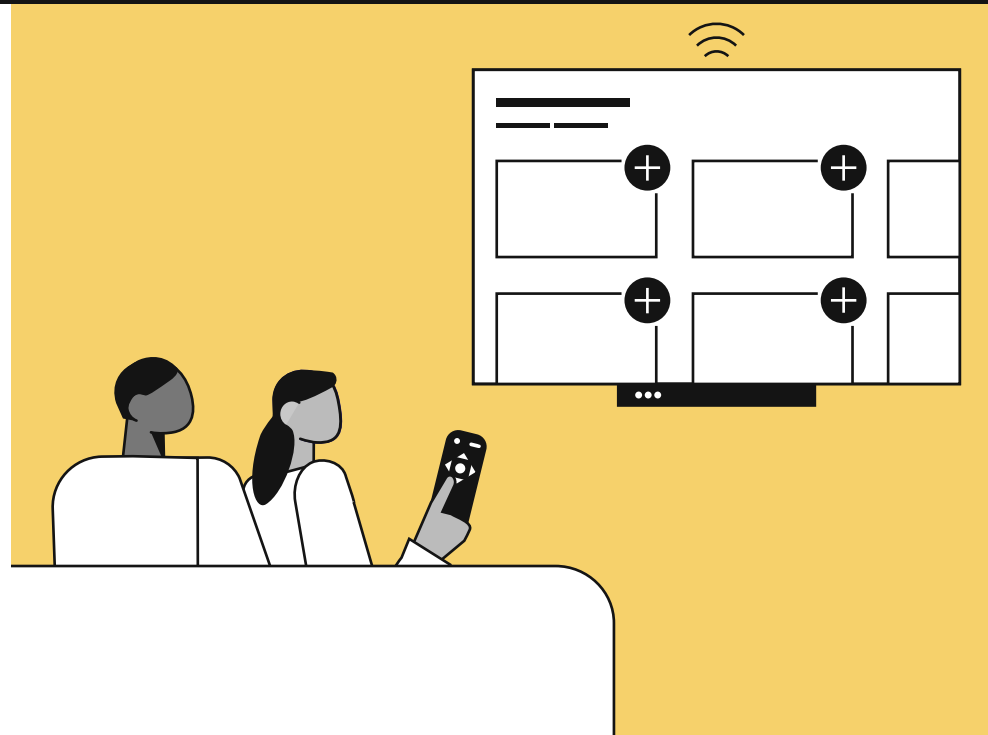


Q: Which of these following services do you use to watch TV shows and films?
Base: Total streamers
Source: Magnite

Streamers are holding onto their subscriptions despite economic pressure.

Rising energy prices and inflation in Europe have impacted consumers' household budgets, giving streamers reason to reevaluate their subscription stack but not to cancel altogether.

Overall, streamers are embracing the value exchange between advertising and a reduced cost or free subscription.



48% of streamers indicated they will downgrade or cancel a streaming TV subscription, yet 76% said they would use a new free or reduced-cost ad-based streaming service.



Streaming services are responding to consumers' needs with lower-cost, ad-supported options.

As consumers reexamine their household expenditures, streaming providers are responding with lower, more cost-effective subscription options.

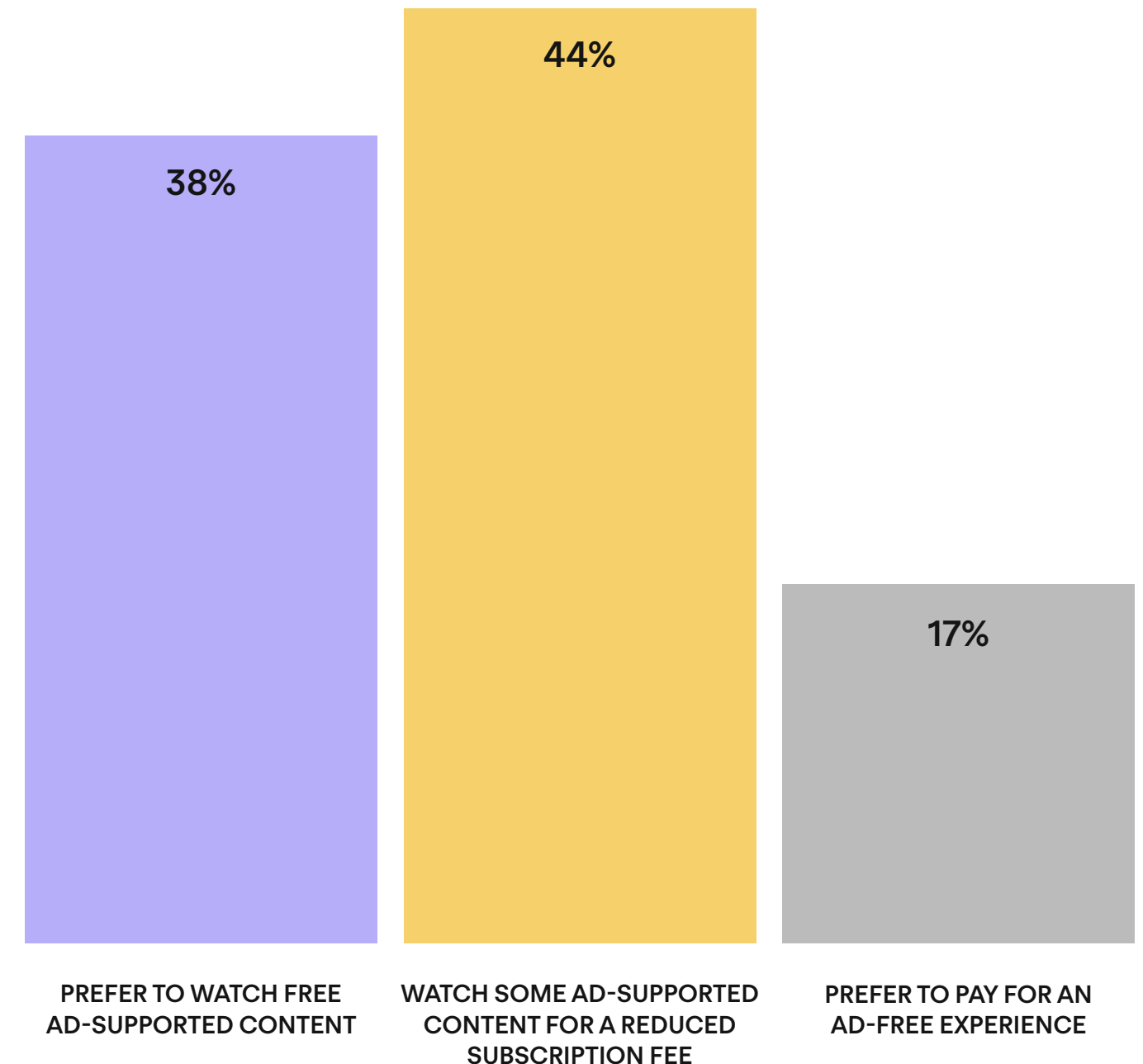
As such, traditional SVOD services, such as Netflix and Disney+, are rolling out ad-supported tiers around the world.

Incentives that provide subscribers with exclusive benefits are also an effective way to acquire new viewers and reduce churn.



61% of TV viewers would likely subscribe to a streaming service if they were offered member-only benefits.

Consumers are choosing ad-supported content



Q: In general, how do you feel about watching advertisements in exchange for free or reduced cost to access TV shows/films?
Base: Total respondents
Source: Magnite

The presence of ads does not have a negative impact on viewer engagement.

Ads do not impact how viewers engage with streaming content.

Our research shows that ad-supported engagement is relatively equal to ad-free engagement.



Ad-supported and ad-free viewers watch the same number of hours of streaming TV each week



Q: In an average week, how many hours of TV do you watch?
Base: Ad-supported only and ad-free only streamers; avg. weekly hours
Source: Magnite

Home screen recommendations play a strong role in content discovery.

A streaming platform's ability to connect audiences with relevant content has become a market imperative.

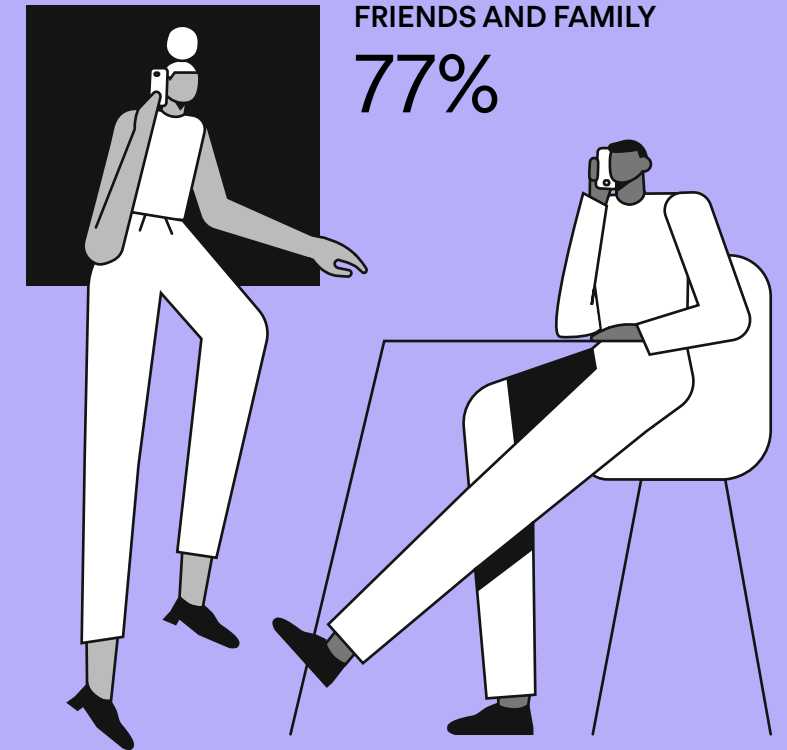
According to our research, while streamers value recommendations most from friends and family, they place a **high level of trust in the programming recommended on the home screen** of their streaming app or smart TV.



Magnite works directly with device manufacturers and media owners to improve search and discovery outcomes through its SpringServe Tiles product.

SpringServe Tiles simplifies the content discovery process for millions of streamers, whether they are searching for paid subscriptions or free content — and provides the flexibility to showcase custom creative within the streaming interface in a variety of non-intrusive formats.

Recommendations for discovering new shows



HOME SCREEN ON STREAMING APP
64%



HOME SCREEN ON SMART TV
60%



Q: How important are recommendations from the following in discovering new shows to watch on streaming platforms?
Base: Total streamers
Source: Magnite

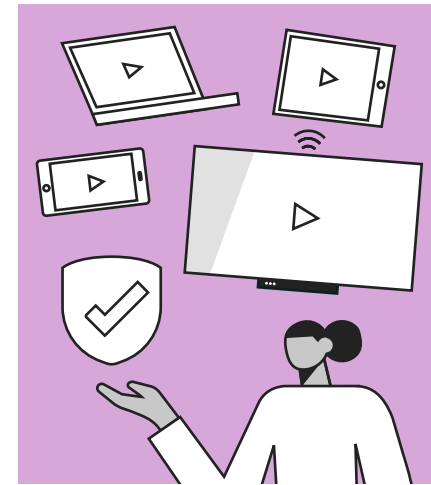


Streaming TV is more impactful than social video.



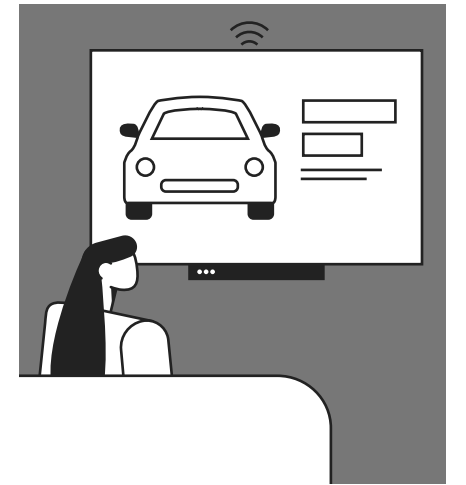
1

Streamers watch for longer periods.



2

Streaming ads are more trusted.



3

Streaming ads are more memorable.

Streaming TV commands the attention of viewers for longer than social video.

Not all video is created equal, particularly in a video advertising environment. Streaming TV viewing sessions are typically several hours long, whereas social video is watched in shorter bursts.

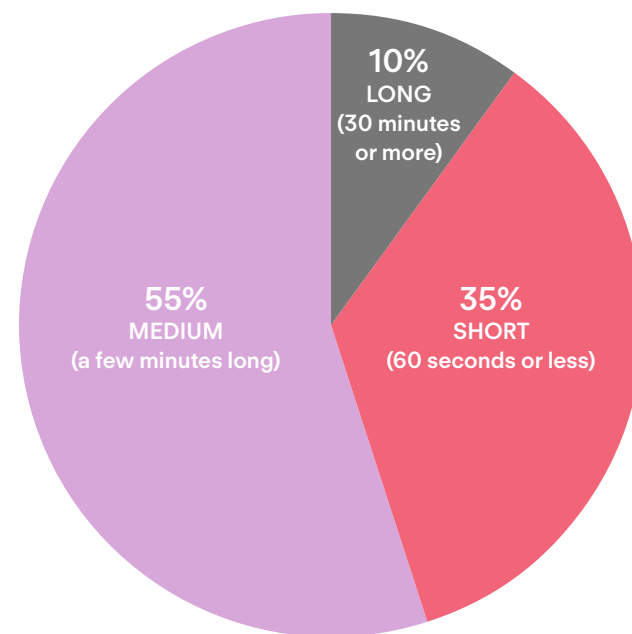
Short videos and viewing sessions on social media add up throughout the day, however, total viewing time doesn't come close to the time spent with streaming TV.

TikTok averages 32 mins per day of viewing time, Snapchat 31 mins, and YouTube 19 mins.¹ By contrast, **streamers are watching over 2 hours of TV programming** each day.

Streaming TV's combination of sustained viewing and premium quality content offers a high-impact, controlled, brand-safe environment for video advertisers.

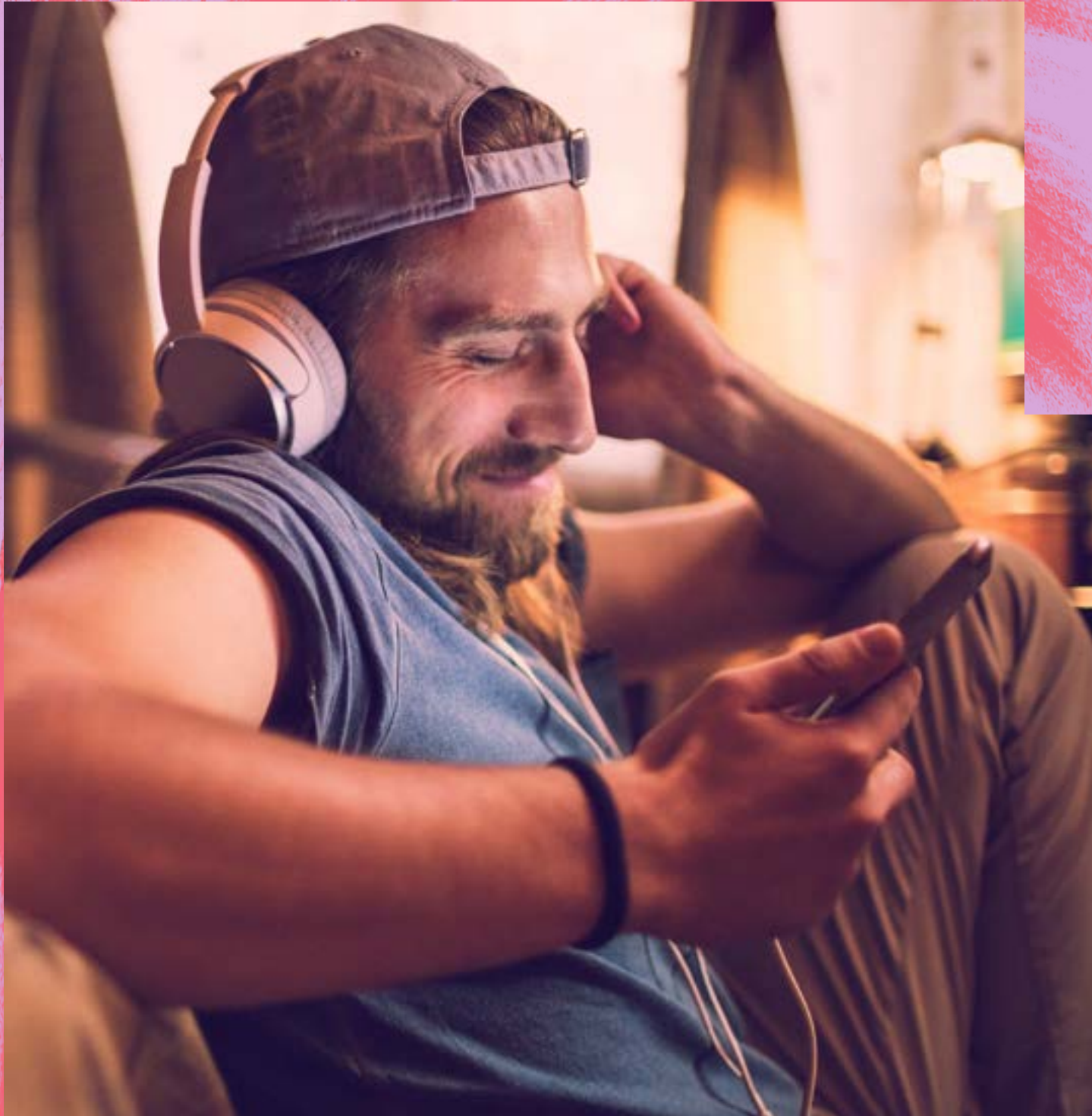
Source: 1) [Broadband and Search](#)

90% of consumers watch short-form videos on social



Q: How long are the videos that you mostly watch on social media platforms?
Base: Total respondents
Source: Magnite



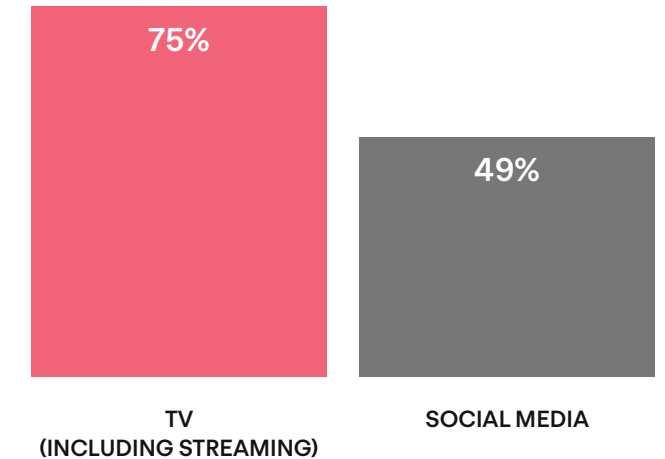


Ads within TV content are trusted more than ads on social media.

TV has always been considered a high-quality and brand-safe environment, creating a halo effect on all TV advertising.

When asked about ad trust on TV and social, our research shows TV to be the definitive winner, with a 26-point advantage.

Ads within TV content are viewed as more trustworthy



Q: To what extent do you find the ads on the following platforms trustworthy?
Base: Total respondents
Source: Magnite

Consumers recall ads more within TV environments than on social media.

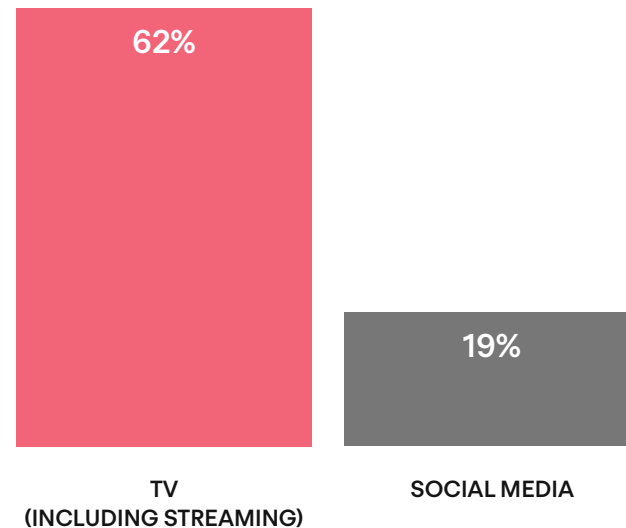
Commanding consumer attention is key to lifting brand visibility.

Research by Rakuten Advertising shows an average of **60% of global viewers can identify an ad within streaming services 24 hours after seeing it.**²

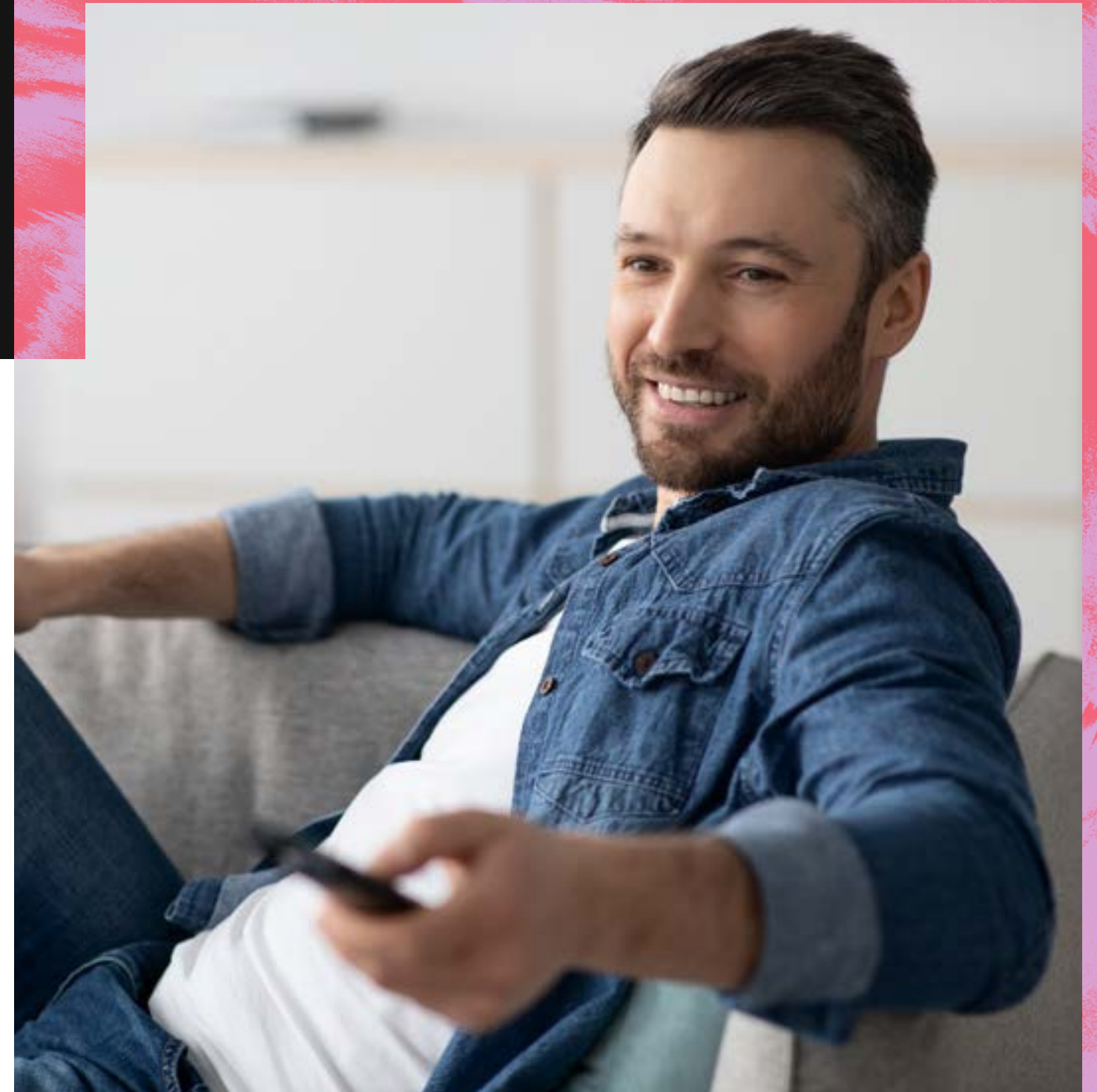
Magnite's findings align with their results and show consumers in the EU5 have a much stronger recall for ads seen within TV content as opposed to social media.

Source: 2) [Rakuten Advertising](#)

Consumers remember ads within TV content more



Q: Thinking of all the advertisements you have seen on the following platforms, which do you generally remember the most?
Base: Total respondents
Source: Magnite



Cross-device campaigns drive better outcomes for brands.

Streamers' viewing habits are omnichannel. **80% of EU5 viewers are watching videos on websites each week** and using multiple devices at home to watch TV.

Meanwhile, 4 out of 5 CTV viewers in Europe are co-viewing. As compared to traditional TV, CTV is more likely to be watched in a group or family setting.³

Exposing viewers to brand messaging across touchpoints enhances impact and visibility.

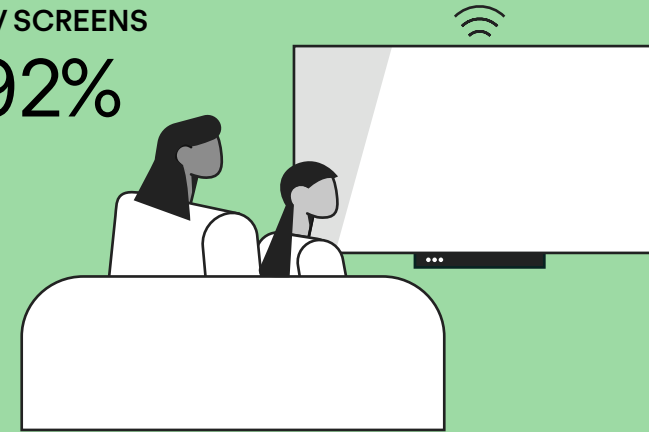
75% of ad-supported streamers are more likely to make a purchase from a brand they engaged with across multiple devices (TV, mobile, desktop, etc.) compared to **64%** of traditional TV viewers.



Source: 3) Magnite: CTV Is for Everyone

Streamers consume TV content across a variety of devices

TV SCREENS
92%



LAPTOP/DESKTOP
69%



SMARTPHONE/TABLET
73%



Q: In a typical week, how frequently do you use each of these to watch TV shows and films at home?
Base: Total streamers
Source: Magnite

SUMMARY

Ad-supported content benefits viewers and brands.

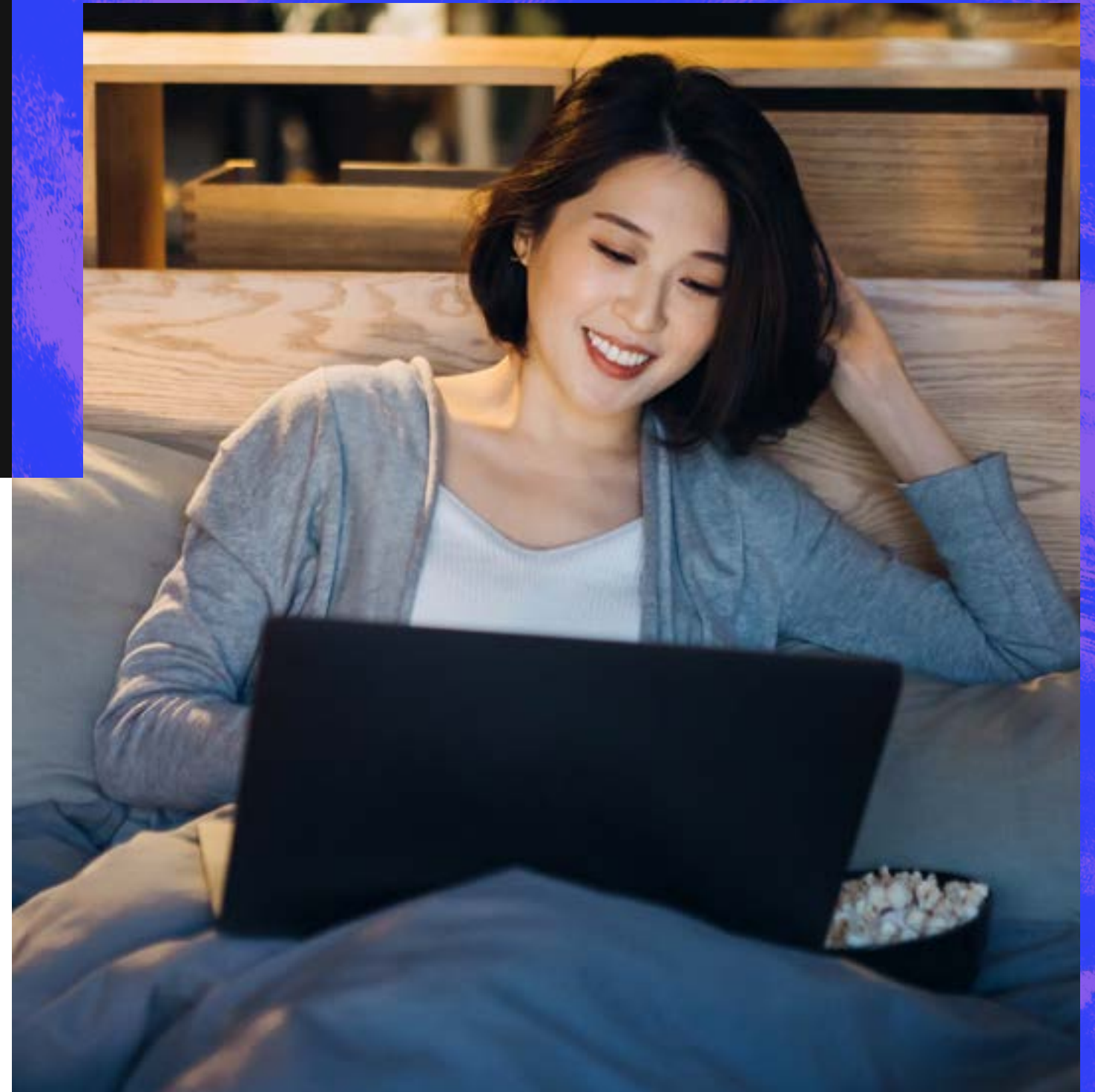
Streaming TV in Europe is evolving rapidly. As Smart TV and smartphone penetration continue to grow and streaming content offerings expand, streaming TV's momentum will continue to surge.

Looking forward, as Europe enters the next generation of streaming, **the majority of growth will most likely be driven by ad-supported viewership.**

Streaming TV audiences show a clear preference for lower-cost subscription fees in exchange for ads, and the demand for ad-supported content is high.

With an increasing share of inventory being ad-supported, streaming TV offers an expanding solution for marketers looking to connect with addressable audiences at scale on high-performance channels.

Streaming TV's ability to garner greater attention and trust among viewers, coupled with streamers' cross-device consumption behaviours, provides brands the unique opportunity to reach captive audiences across all screen types.



Streaming TV's New Era

How Ads Are Powering
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Magnite Research, 2023

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UK Streaming Report



Introduction

Streaming continues to be the most popular form of TV in the UK, and viewers are choosing ad-based environments as their preferred way to watch.

Consumers' adoption of ad-supported content indicates that it will fuel streaming's future. Meanwhile, UK audiences are not wedded to one screen, and their cross-device consumption builds stronger connections with brands.



Building momentum of ad-supported streaming TV.

In the UK, TV viewership has shifted from traditional linear to streaming TV, specifically to ad-based environments.

While most streamers are currently watching with ads, the trend toward ad-supported content will likely continue. Magnite's study found that 45% of streamers are looking to downgrade or cancel a TV subscription, yet **three-quarters will add a new ad-based streaming service for free or at a reduced fee.**

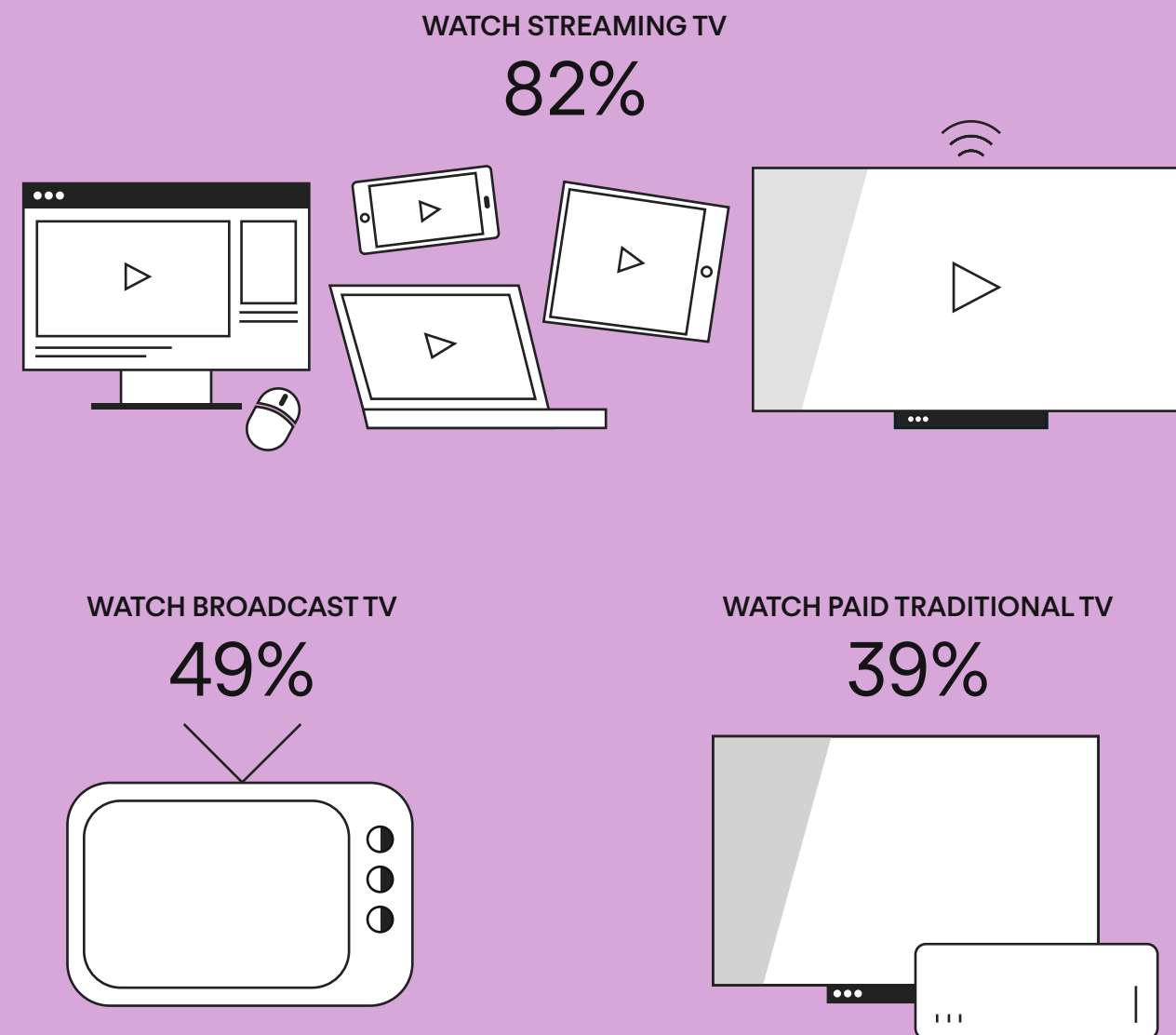
Boomers (audiences in their mid-50s to 70s) are also shifting away from traditional TV to ad-supported streaming. 69% of boomers said they watch broadcast TV, and 61% said they watch streaming TV. **Among boomers who currently stream, 89% are viewing content with ads.**



Ad-supported content is watched by more streamers than ad-free.

82% watch ad-supported
51% watch paid ad-free

More viewers are watching streaming than any other form of TV



Q: Which of these services do you use to watch TV shows and films?
Base: Total respondents
Source: Magnite

Streaming TV is a more immersive viewing experience than social video.

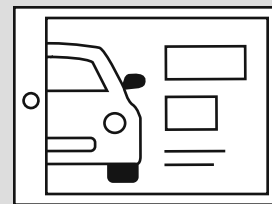
Streaming TV has the power to captivate viewers for longer periods of time. **Streamers who only watch ad-supported content and no other form of TV watch an average of 16.3 hours each week**, equating to more than two hours daily.

In contrast, most UK consumers are watching short-form videos on social media. The estimated average time consumers will spend watching videos on social this year is 30 minutes per day, according to eMarketer.⁴

Average weekly hours watching

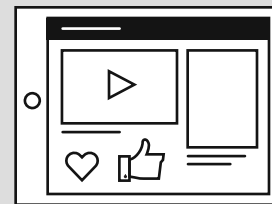
AD-SUPPORTED
STREAMING TV

16.3 hours

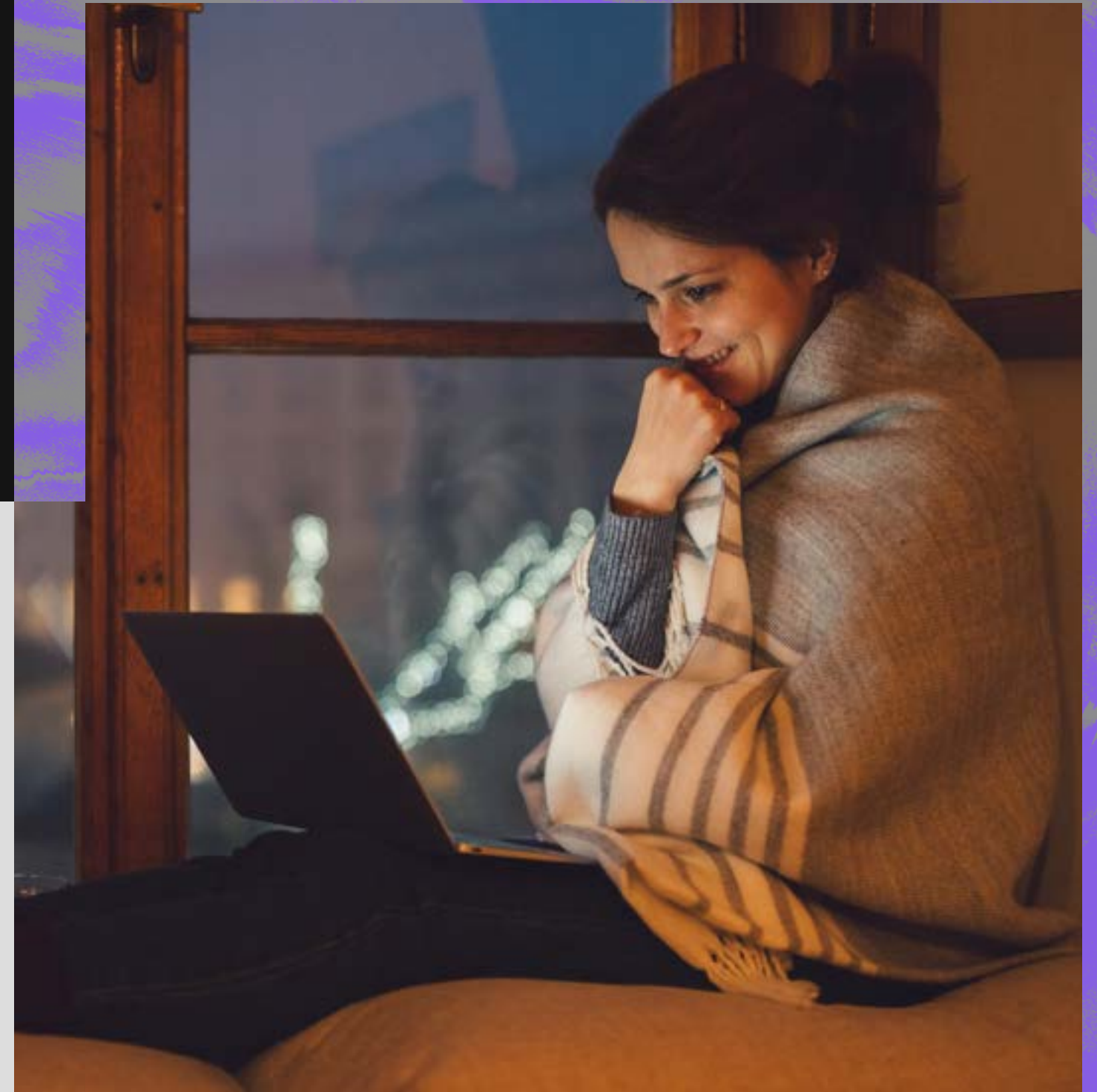


VIDEOS ON
SOCIAL

3.5 hours



Source: 4) eMarketer

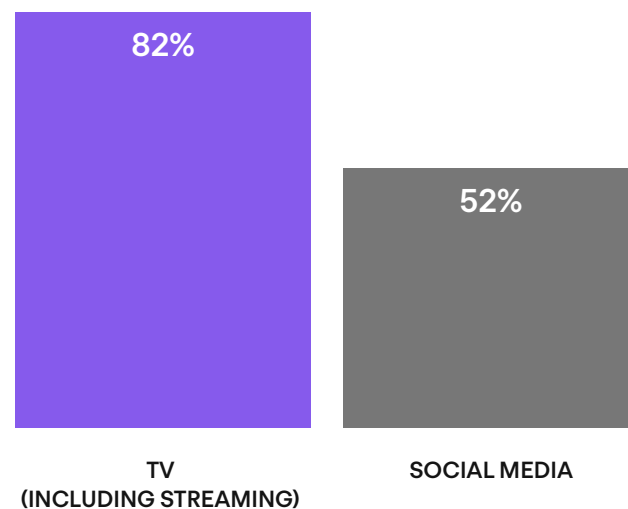


More consumers trust and recall ads within TV content over social media.

TV has traditionally been held to higher standards, garnering greater consumer trust in advertising than social media.

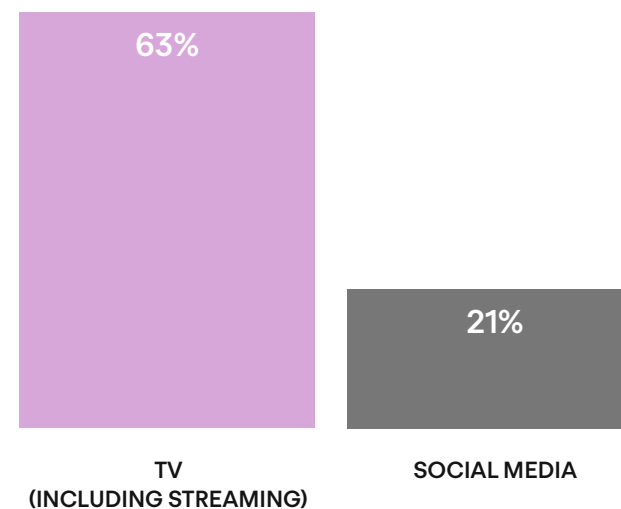
TV environments are also more effective at keeping brands top-of-mind, with **three times as many consumers recalling ads within TV content compared to social media.**

Ads within TV content are viewed as more trustworthy

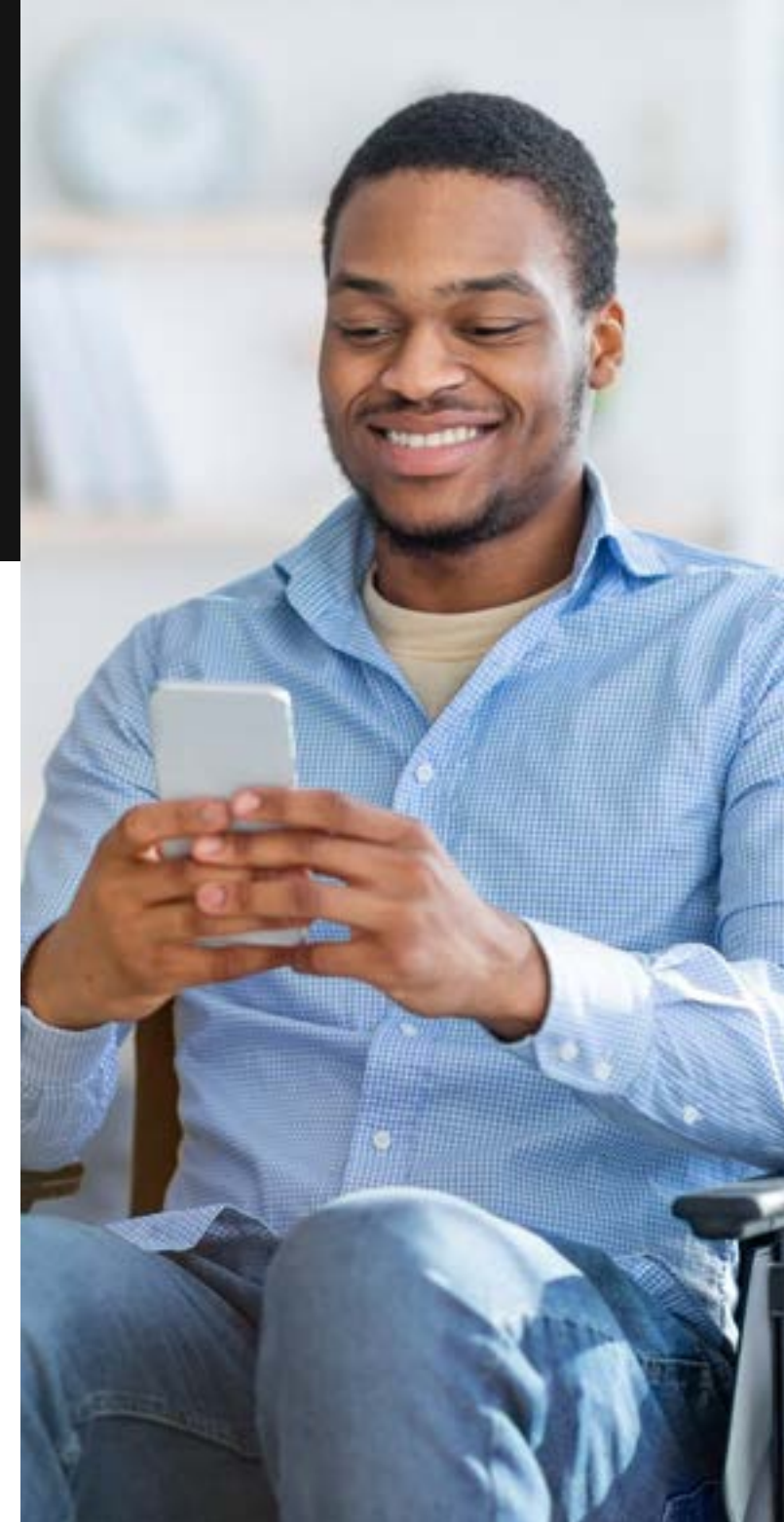


Q: To what extent do you find the ads on the following platforms trustworthy?
Base: Total respondents
Source: Magnite

Ads within TV content are remembered more



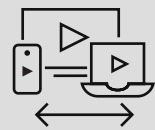
Q: Thinking of all the advertisements you have seen on the following platforms, which do you generally remember the most?
Base: Total respondents
Source: Magnite



UK streamers' cross-device consumption habits lead to action.

In line with streamers in the EU5 region, UK streamers are consuming content on multiple devices.

This cross-screen exposure forges a strong relationship between brands and consumers and influences consumers' purchase intent.



72% of ad-supported streamers are more likely to make a purchase from a brand that they engaged with across multiple devices compared to 63% of traditional TV viewers.

Cross-device TV consumption habits among streamers

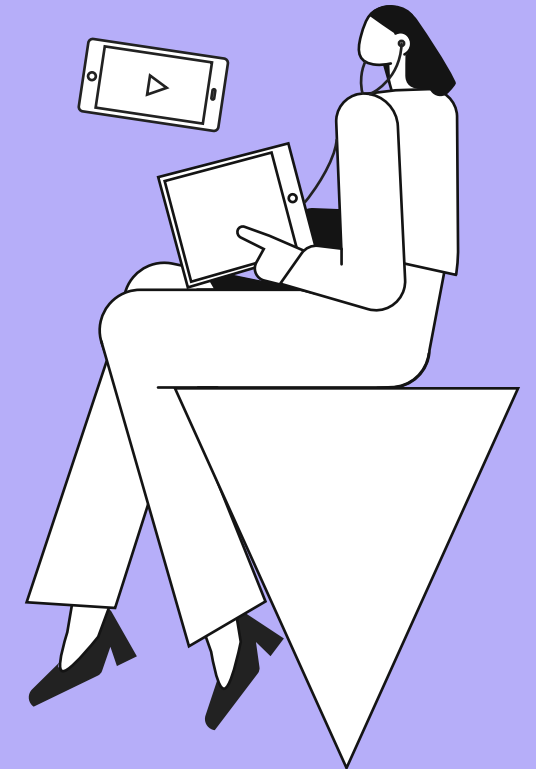
TV SCREENS
95%



LAPTOP/DESKTOP
60%



SMARTPHONE/TABLET
69%



Q: In a typical week, how frequently do you use each of these to watch TV shows and films at home?
Base: Total streamers
Source: Magnite

Summary

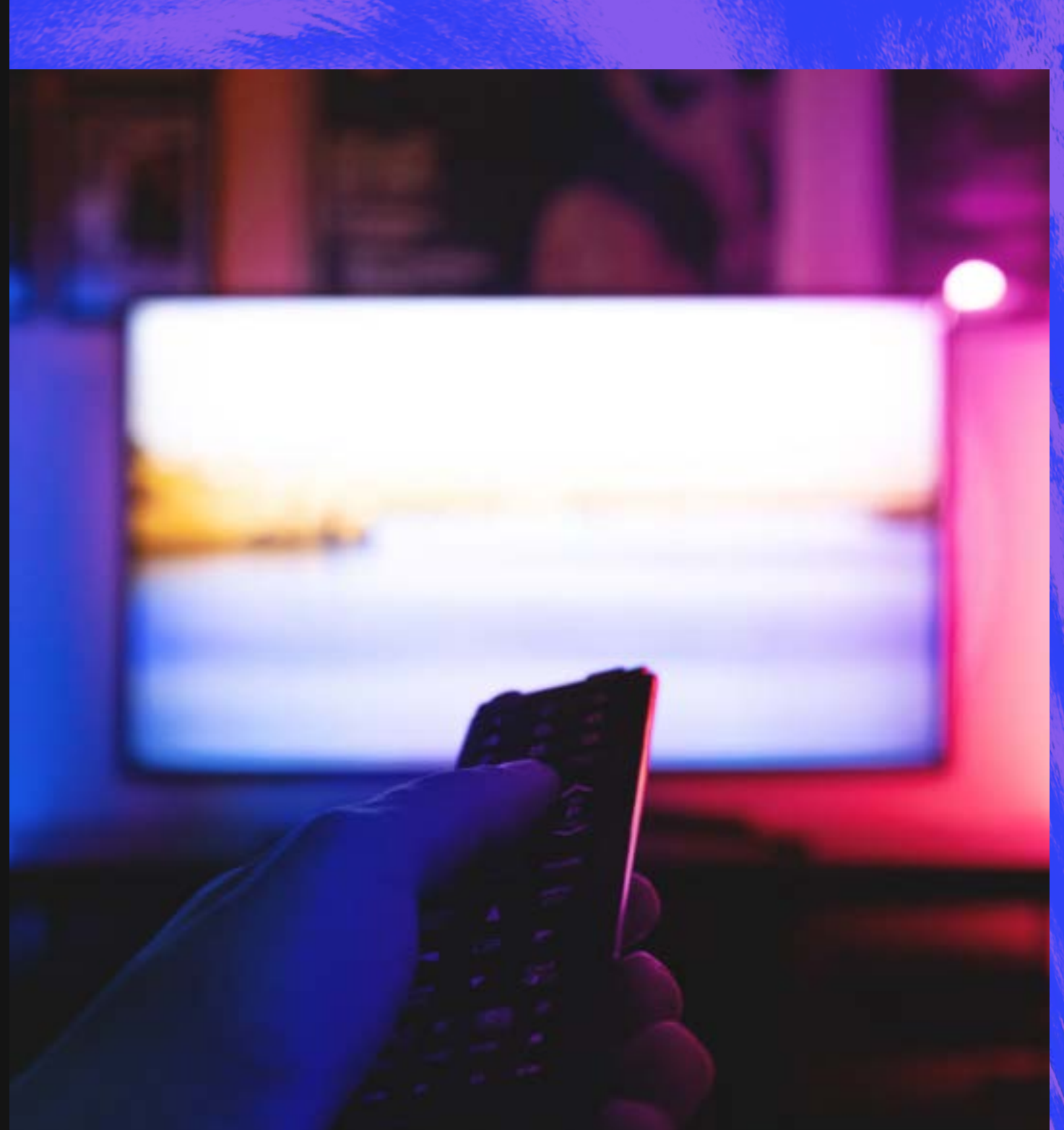
In the UK, TV is experiencing a changing of the guard — with consumers showing a clear preference for ad-supported streaming content across screens.

This provides a prize opportunity for brands to engage audiences throughout their purchase journey and drive campaign impact.



Ready to activate the power of ad-supported streaming TV?

Ask your Magnite account representative for help
or email buyer-uk@magnite.com



Streaming TV's New Era

How Ads Are Powering
Streaming's Future in France

Magnite Research, 2023

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France Streaming Report



Introduction

French TV viewers are adopting streaming TV with ad-supported content as their main form of streaming programming.

Most TV viewers prefer ad-based over ad-free streaming content, signaling that ad-supported will drive streaming's overall growth.



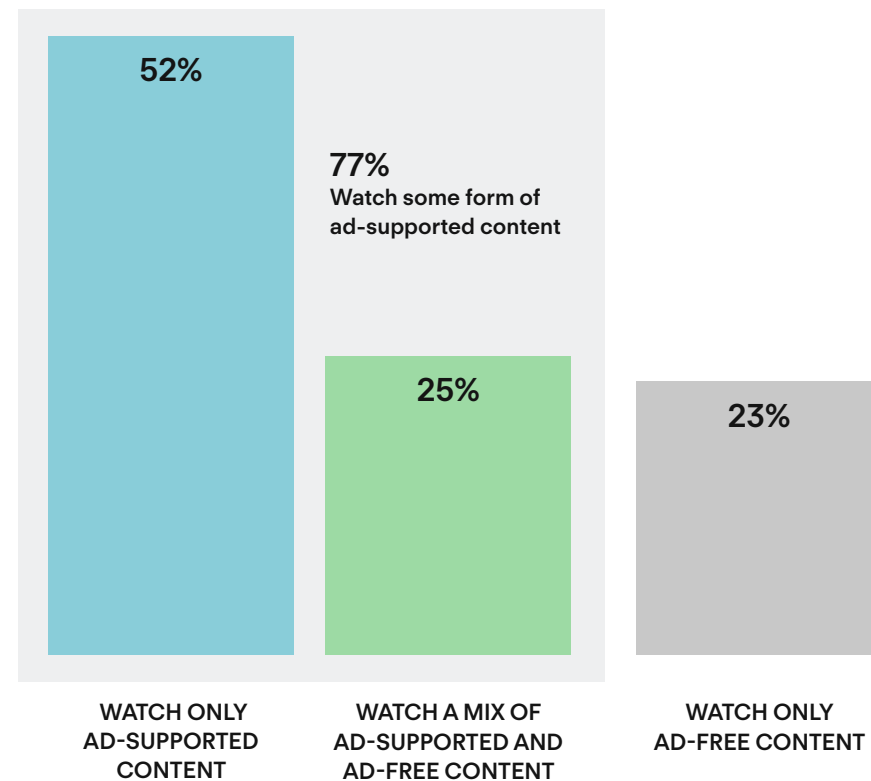
As streaming TV grows in popularity, most viewers are choosing services with ads.

Streaming TV is growing in popularity in France. Consumption of streaming TV is now on par with broadcast television. Viewership of streaming TV will likely increase. According to Amagi, France saw 120% growth in CTV adoption in 2022 vs. 2021.⁵

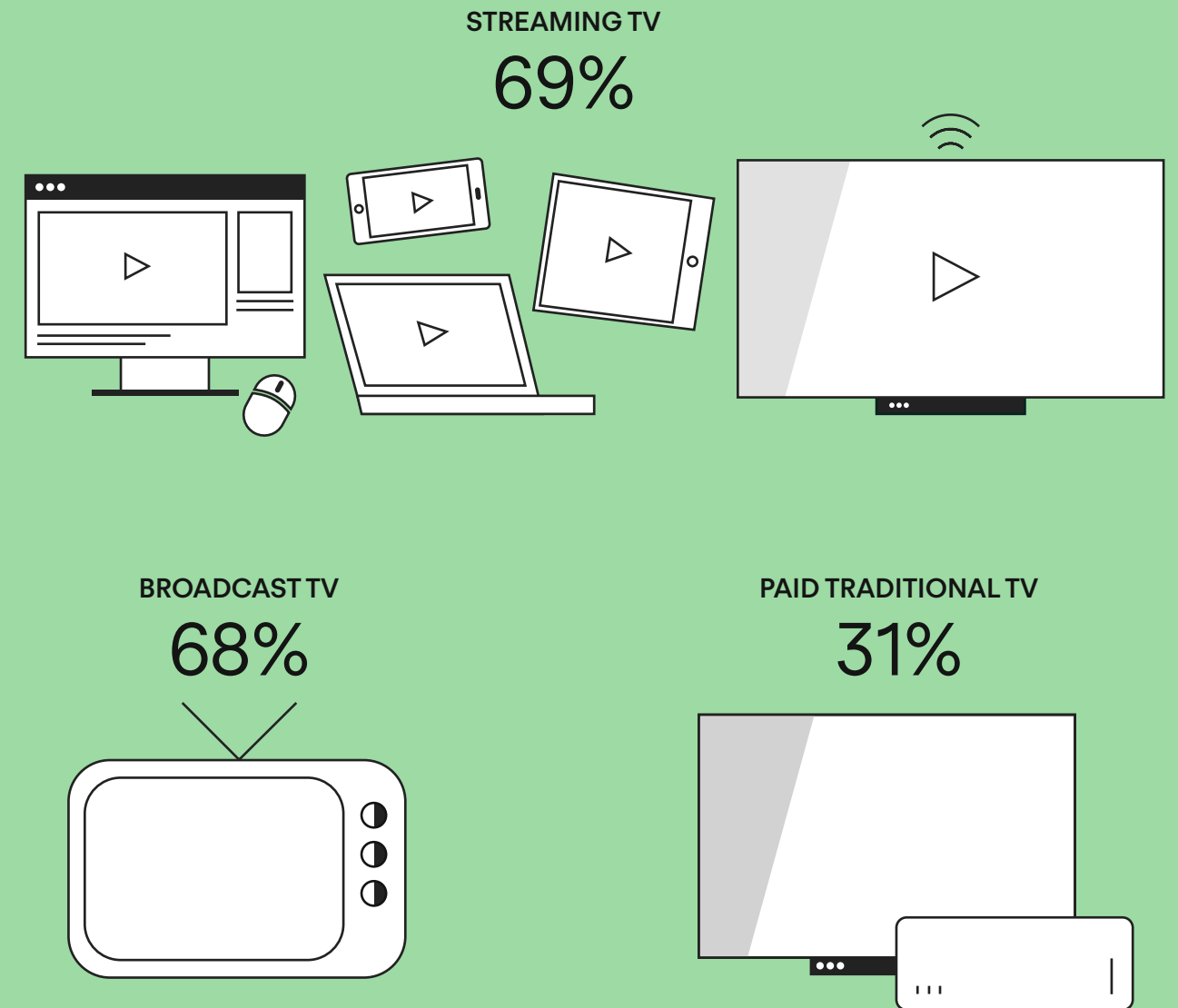
Viewers are shifting to streaming TV and choosing services with ads. Magnite's research shows that **three-quarters of streamers are watching some form of ad-supported content.**

Q: Which of these following services do you use to watch TV shows and films?
Base: Total streamers
Sources: 5) Amagi; Magnite

Most streamers are watching content with ads



Viewership of streaming TV is on par with broadcast



Q: Which of these services do you use to watch TV shows and films?
Base: Total respondents
Source: Magnite

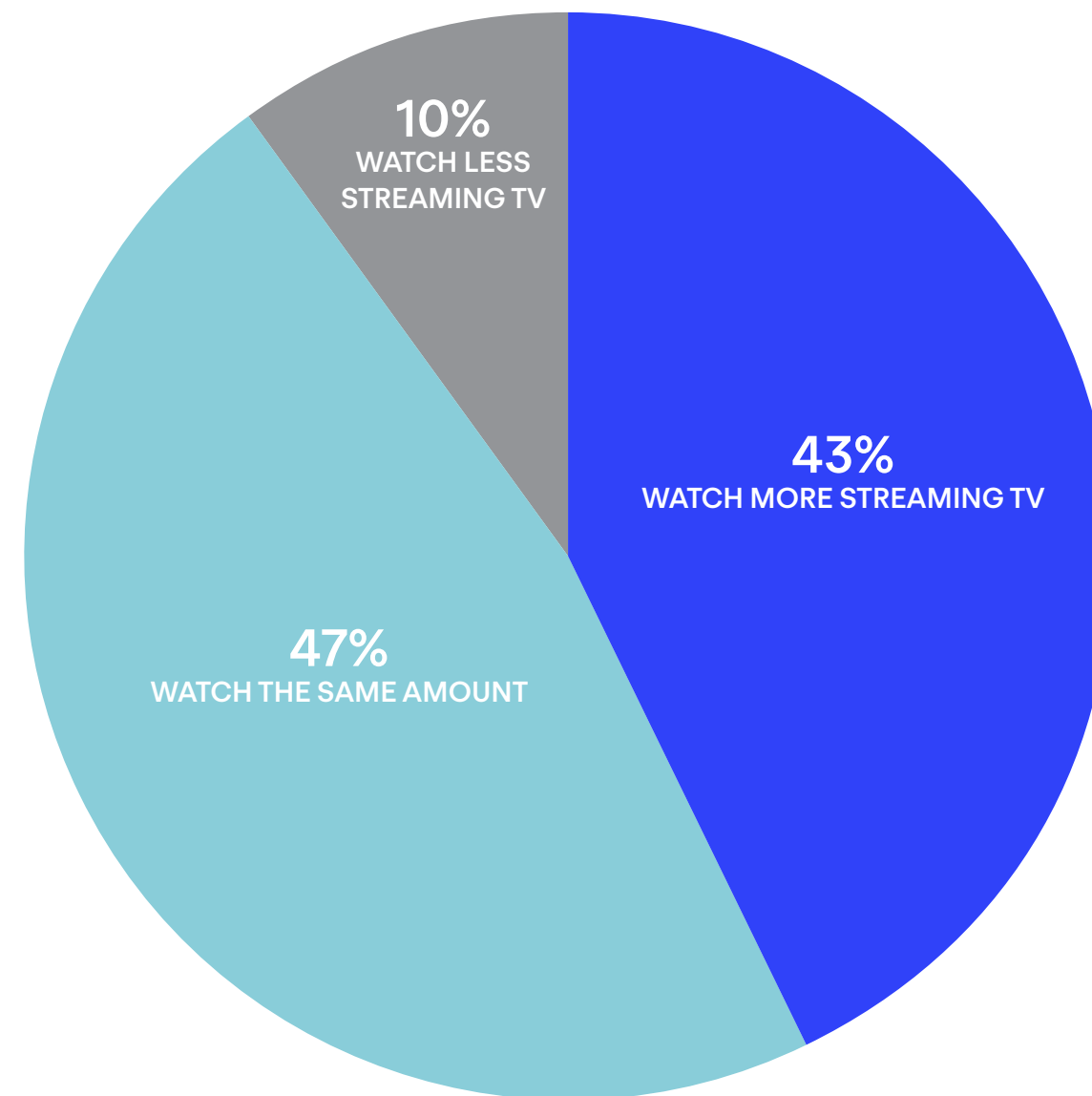
Streamers have an affinity for ad-supported content.

The presence of ads is not preventing ad-supported streamers from consuming more content compared to last year.

43% of streamers who watch paid ad-supported content said they are watching more than a year ago, while only 10% are watching less.



Ad-supported streamers are watching more than last year



Q: Compared to one year ago, are you watching more or less streaming TV content, or has the amount remained the same?
Base: Paid ad-supported streamers
Source: Magnite

Ad-supported content will likely drive streaming's overall growth.

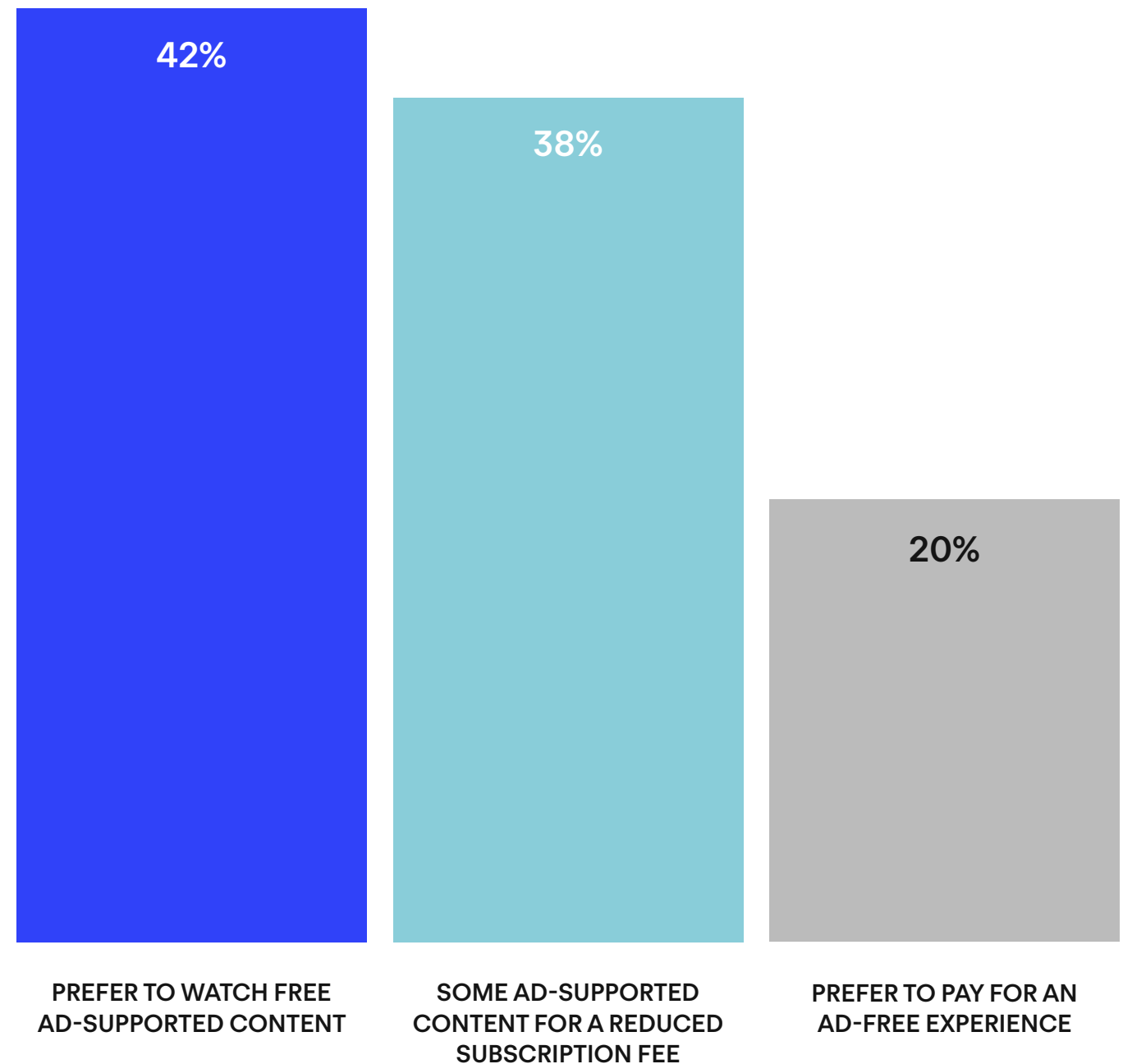
Ad-supported content will likely remain the preferred way to watch as the shift to streaming TV viewership continues.

A majority of TV viewers said they would choose content with ads in exchange for free or reduced-cost access to streamed TV services.



62% of TV viewers would use a new ad-based streaming service for a free or reduced-cost.

Viewers choose content with ads



PREFER TO WATCH FREE AD-SUPPORTED CONTENT

SOME AD-SUPPORTED CONTENT FOR A REDUCED SUBSCRIPTION FEE

PREFER TO PAY FOR AN AD-FREE EXPERIENCE

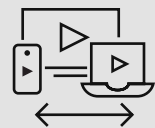
Q: In general, how do you feel about watching advertisements in exchange for free or reduced cost to access TV shows/films?
Base: Total respondents
Source: Magnite

Cross-device viewing drives action.

Broadcast's strong tradition in France has instilled a sense of trust in TV, which extends to the ads shown across all TV environments.

Ads within TV content are trusted by 66% of viewers who only watch streaming TV and 63% of those who only watch traditional TV.

Additionally, cross-device consumption habits among streamers further enhances their connection to brands and drives purchase decisions.



63% of ad-supported streamers are more likely to make a purchase from a brand they engaged with across multiple devices vs. 48% of traditional TV viewers.

Cross-device TV consumption habits among streamers

TV SCREENS

82%



LAPTOP/DESKTOP

67%



SMARTPHONE/TABLET

68%



Q: In a typical week, how frequently do you use each of these to watch TV shows and films at home?
Base: Total streamers
Source: Magnite

Summary

France is experiencing a new wave of TV viewing as traditional TV viewers migrate to ad-supported streaming TV on multiple devices.

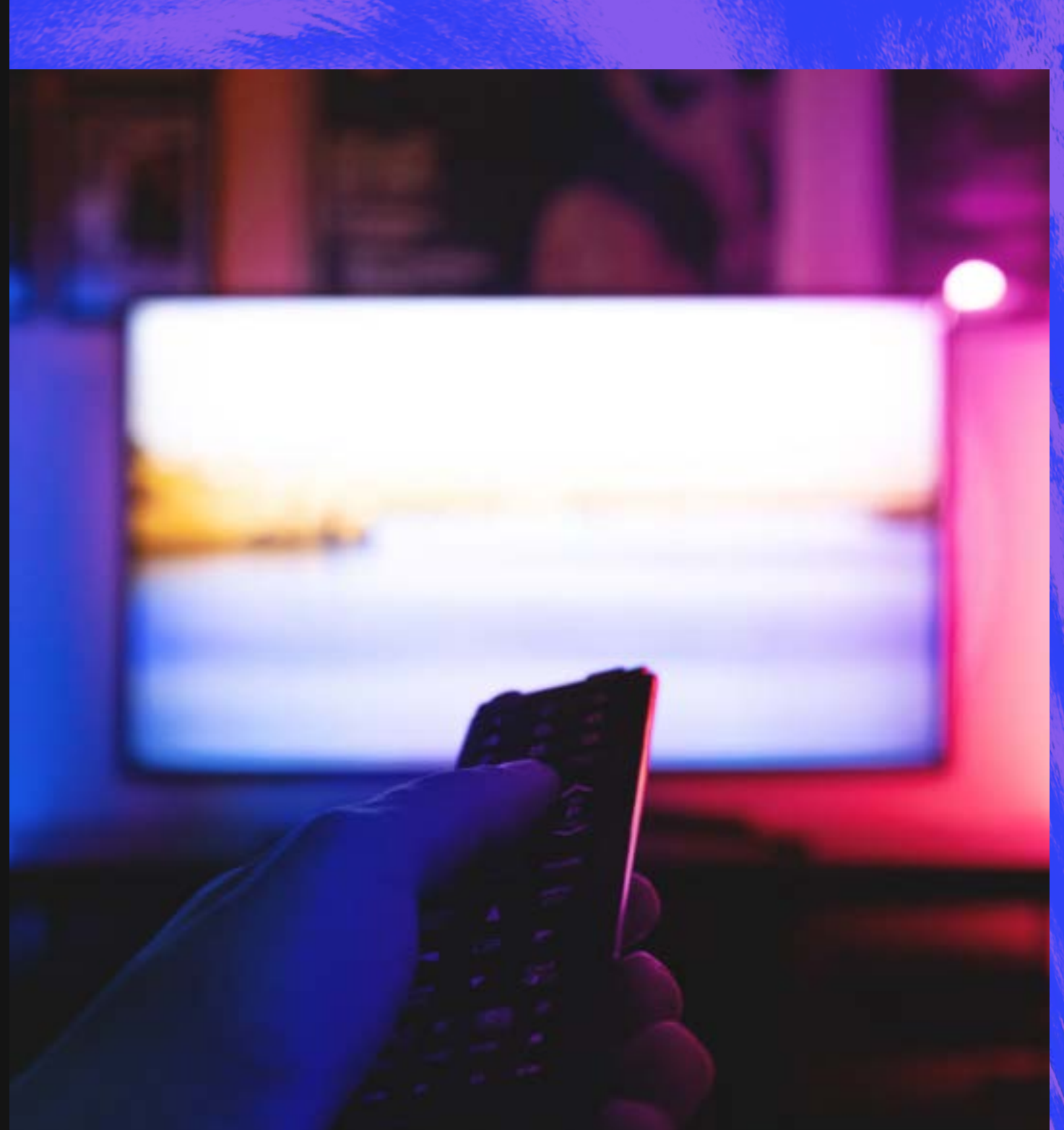
The trust viewers have in traditional TV carries over to streaming TV, fostering deeper connections with brands.

This gives advertisers a strong imperative to include streaming TV in their media mix.



Ready to activate the power of ad-supported streaming TV?

Ask your Magnite account representative for help
or email frbe_buyers@magnite.com



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Germany Streaming Report



Introduction

Streaming TV has a powerful hold on the German TV market, especially ad-supported content.

While economic factors are making consumers reconsider household spending, German audiences are not giving up streaming TV but are adding more ad-supported options to their subscription stack.

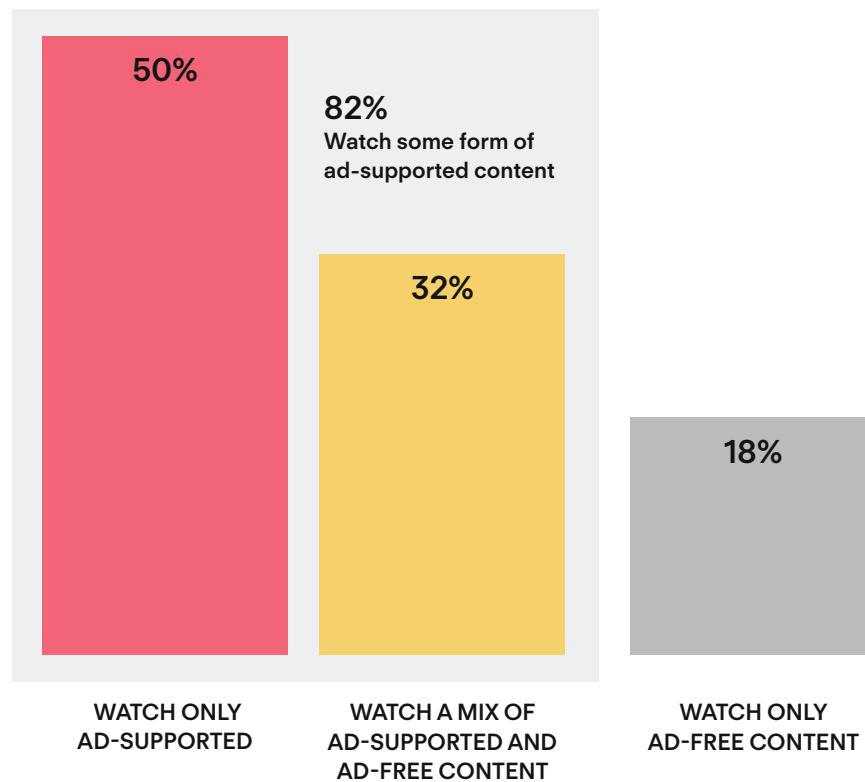


More streaming TV viewers are watching ad-supported content than ad-free.

In line with the EU5 region, streaming TV is the most watched form of television in Germany.

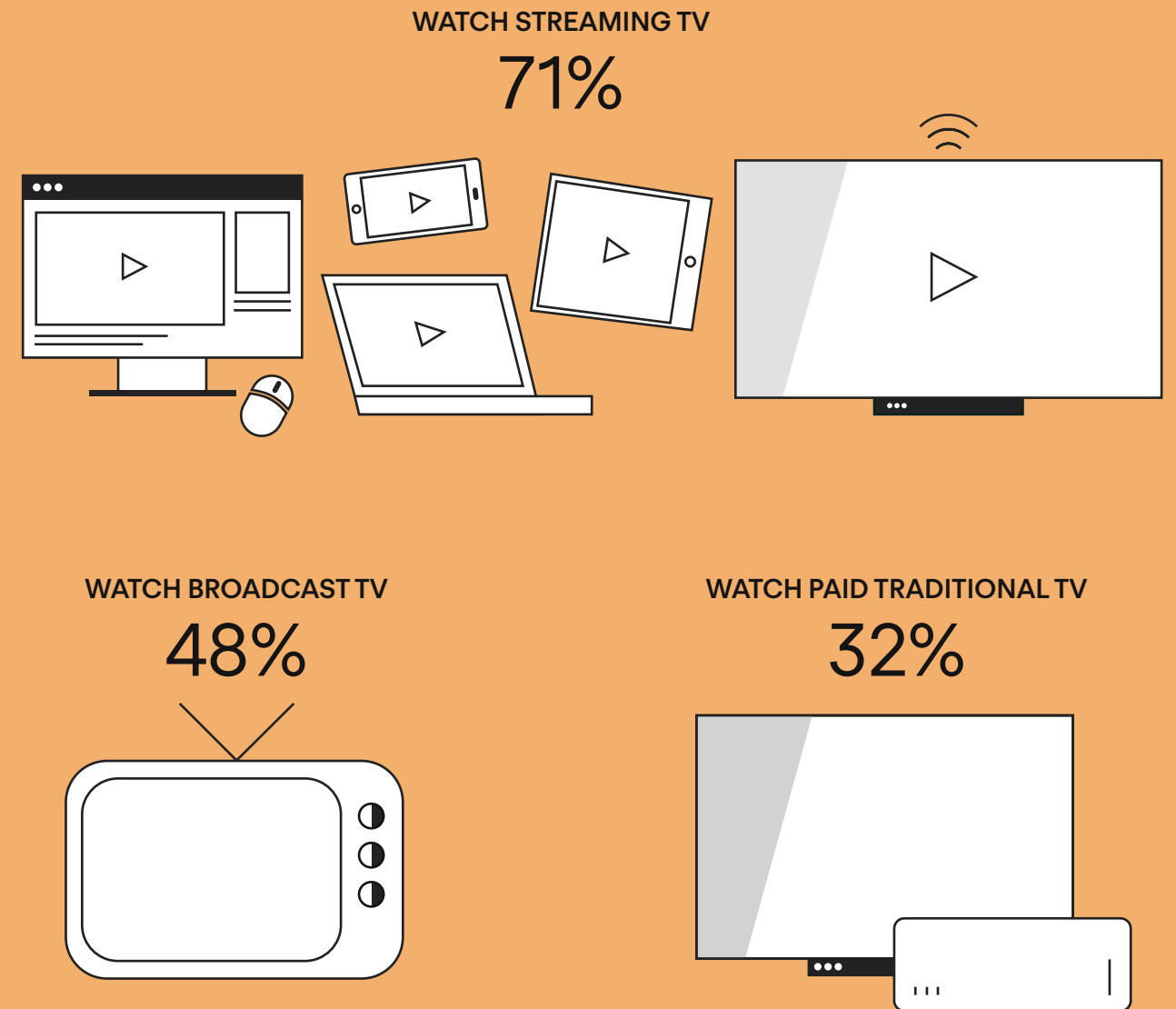
Notably, German streaming TV viewership leans heavily toward ad-based environments: **82% of streamers are watching some form of ad-supported content**, and half are watching with ads.

Ad-supported streaming TV is more popular than ad-free



Q: Which of these following services do you use to watch TV shows and films?
 Base: Total streamers
 Source: Magnite

More viewers watch streaming than any other form of TV



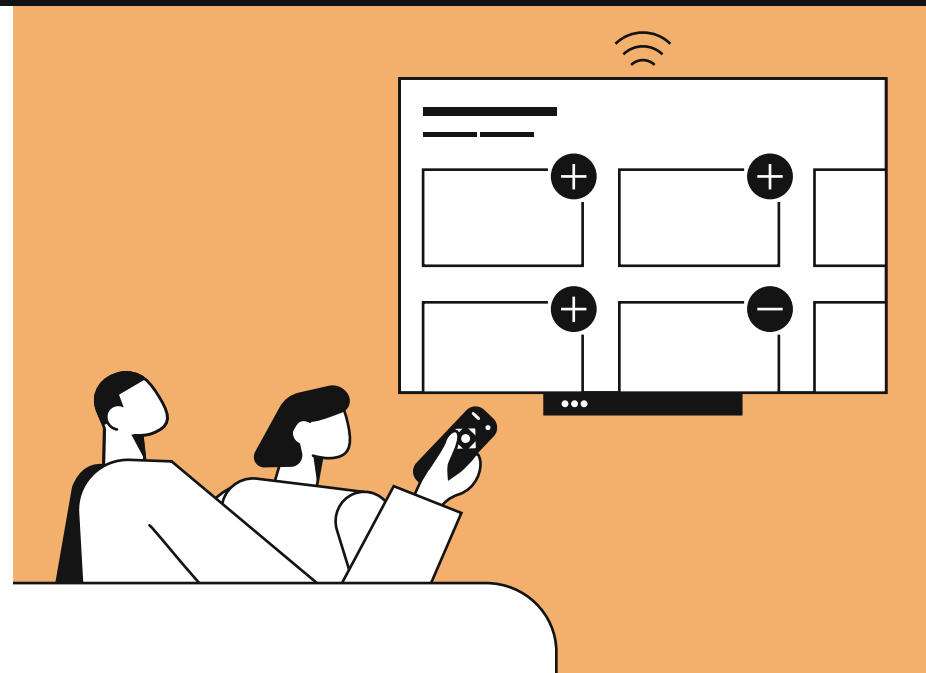
Q: Which of these services do you use to watch TV shows and films?
 Base: Total respondents
 Source: Magnite

Germans are keeping their streaming subscriptions despite economic strain.

While inflation and economic factors are putting pressure on household budgets, **streamers in Germany are not giving up their streaming subscriptions, but will reevaluate their subscription stack to include ad-supported.**

Research from eMarketer reinforces streaming's importance to German consumers. When asked which categories they are likely to reduce in spending, only 22% said streaming services.⁶

Source: 6) eMarketer



43% of streamers are likely to downgrade or cancel a TV subscription, and 74% are likely to subscribe to a new ad-based service for a free or reduced cost.



Streaming's high engagement lifts advertising impact.

Audiences who watch ad-supported content are watching an increasing amount of streaming television. **Among ad-supported viewers, 38% are watching more streaming as compared to a year ago**, while only 9% are watching less.

Viewers' strong affinity for streaming content rubs off on ads, **with 82% of ad-supported streamers saying they trust ads within TV content**. By comparison, only 55% of viewers say they find ads trustworthy on social media.

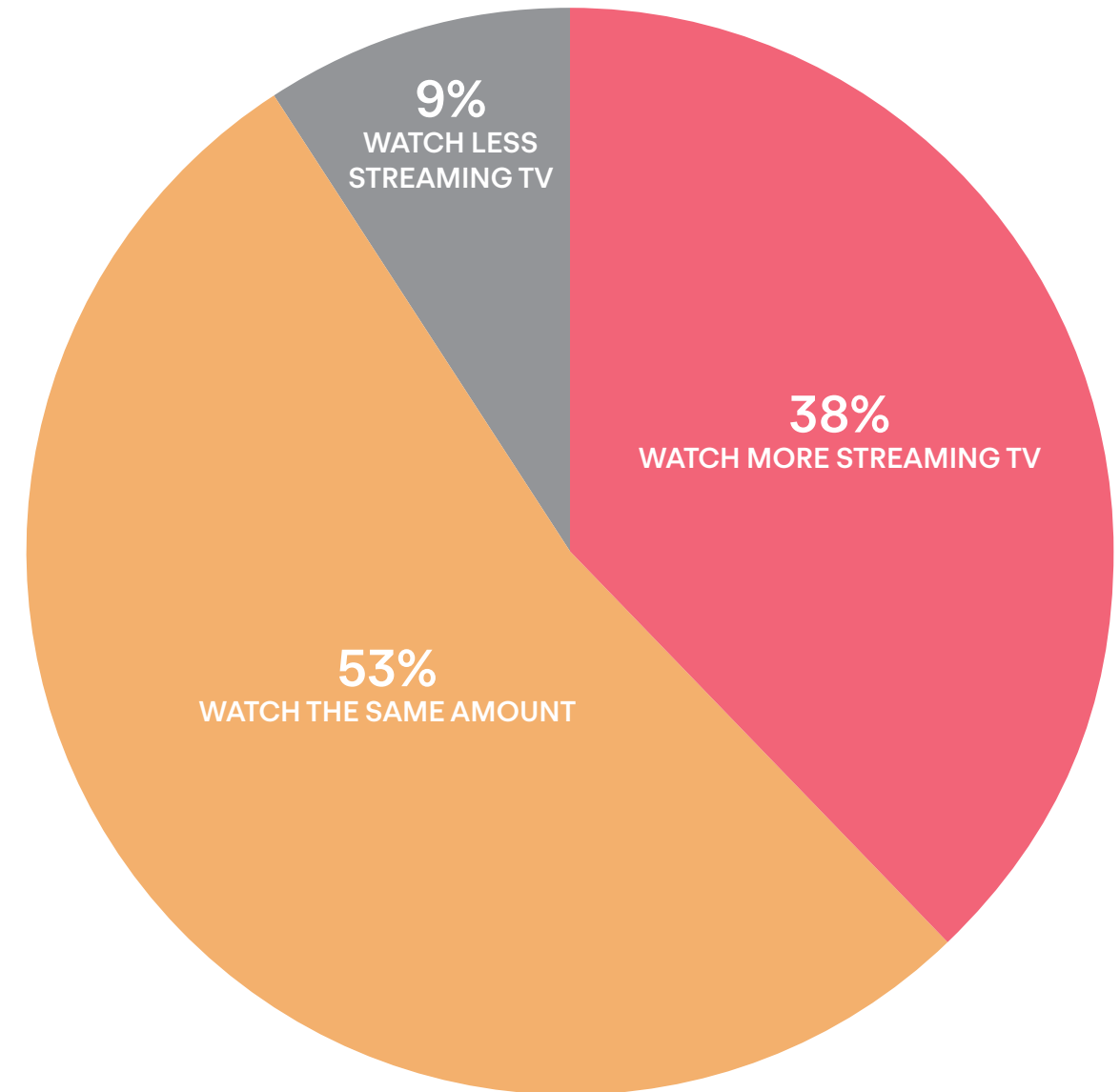
Streaming TV also provides a more immersive, lean-back experience than social. On social channels, 89% of consumers watch short-form video content as opposed to longer-form video.



82% of streamers who watch ad-supported programming say they trust TV ads. Only 55% of social video viewers trust ads on social media.

Consumption among ad-supported streamers has increased versus a year ago

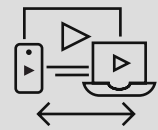
Compared to last year, ad-supported streamers are...



Q: Compared to one year ago, are you watching more or less streaming TV content, or has the amount remained the same?
Base: Total ad-supported streamers
Source: Magnite

Cross-device viewing drives action.

German streamers are watching TV content across devices. This multi-screen exposure across touchpoints reinforces brand messaging, driving purchasing decisions.



75% of ad-supported streamers are more likely to purchase from a brand they engaged with across multiple devices as compared to 59% of traditional TV users.

Cross-device TV consumption habits among streamers

TV SCREENS

92%



LAPTOP/DESKTOP

65%



SMARTPHONE/TABLET

70%



Q: In a typical week, how frequently do you use each of these to watch TV shows and films at home?
Base: Total streamers
Source: Magnite

Summary

As German viewers prioritise ad-supported streaming over traditional TV, brands gain the ability to connect with addressable audiences with increasing reach and scale.

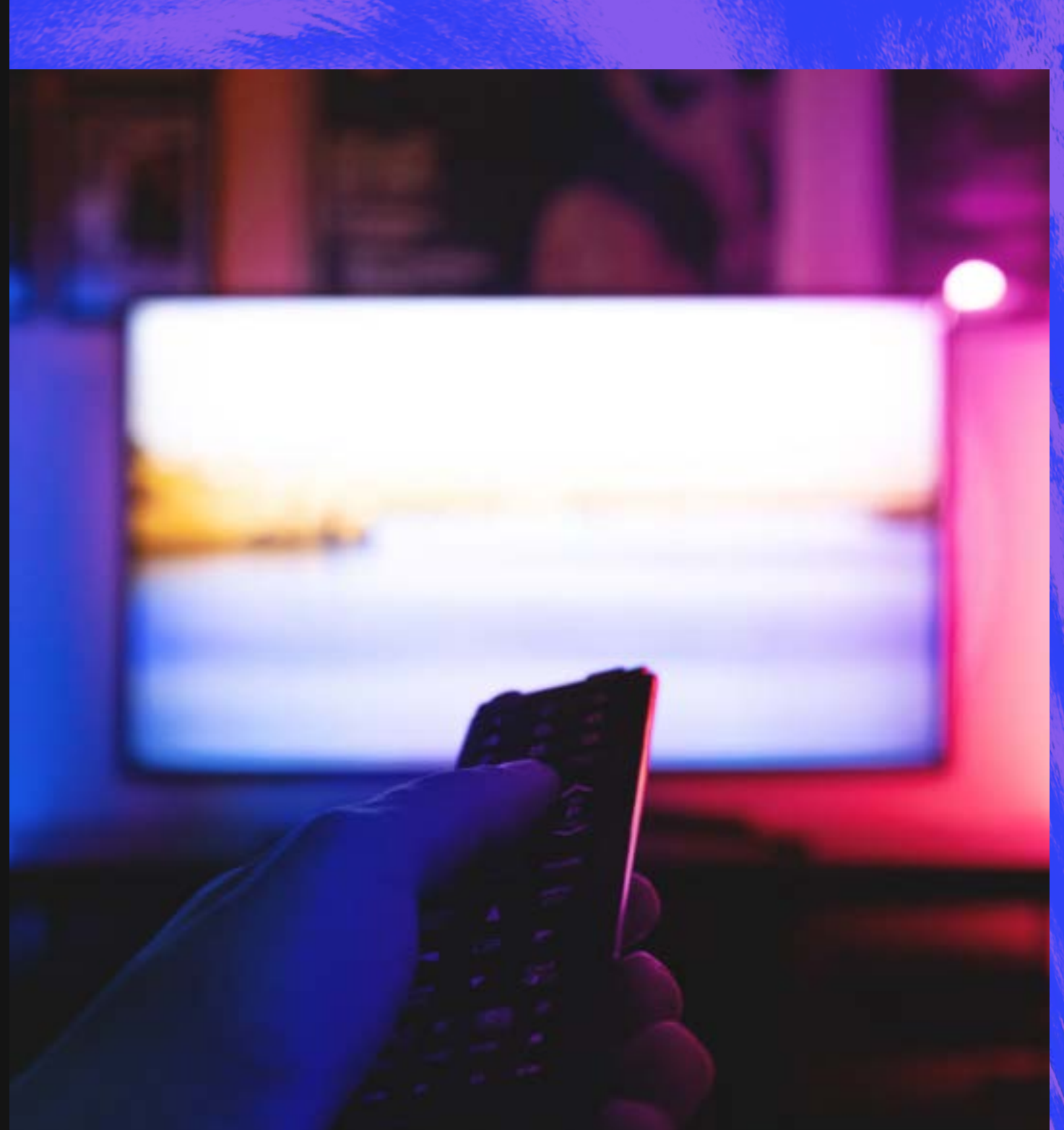
The multi-device viewing habits of German audiences drive purchase decisions and advertising impact.

This presents a ripe opportunity for advertisers to lift brand visibility and forge stronger connections with consumers.



Ready to activate the power of
ad-supported streaming TV?

Ask your Magnite account representative for help
or email ce-demand-team@magnite.com



Streaming TV's New Era

How Ads Are Powering
Streaming's Future in Italy

Magnite Research, 2023

Magnite



Italy Streaming Report



Introduction

In Italy, ad-supported streamed content is now the most watched form of television.

The format attracts all ages, including boomers (viewers in their mid-50s to 70s) who have been traditionally loyal to broadcast TV.

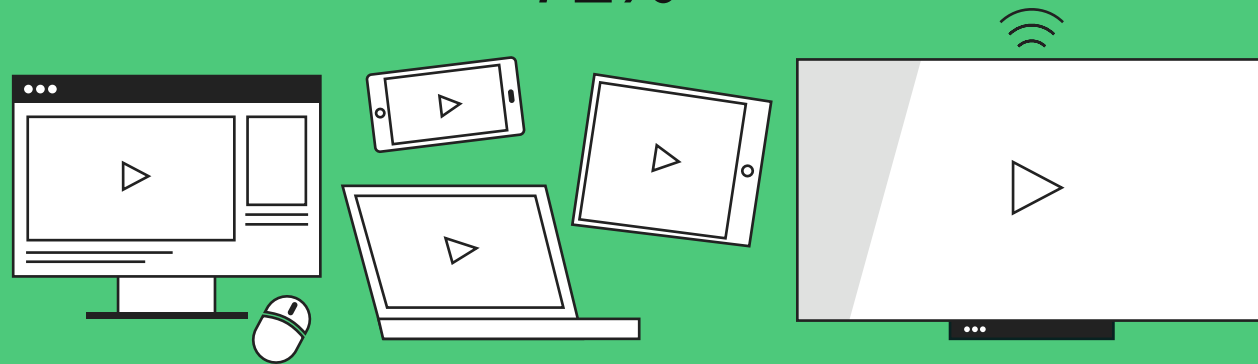
Notably, Italians' cross-device consumption of TV and movie content drives engagement across multiple screens.



Ad-supported streaming is watched more than traditional TV

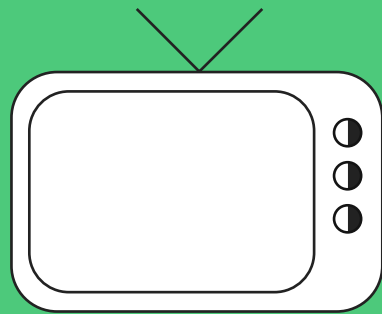
WATCH SOME FORM OF AD-SUPPORTED STREAMING

72%



WATCH BROADCAST TV

63%



WATCH PAID TRADITIONAL TV

44%



Q: Which of these services do you use to watch TV shows and films?
Base: Total respondents
Source: Magnite

Viewership of ad-supported content is not slowing down.



Audiences in Italy watch ad-supported streaming TV more than any other form of television.

As more Italians adopt streaming, they're choosing ad-supported environments, indicating that streaming's growth is driven by ad-supported content.

Among viewers, **83% said they are likely to use a new free or reduced-cost streaming service in exchange for seeing ads.**

Ad-supported content will drive streaming's growth.

83% of viewers would use a new ad-based streaming service for free or at a reduced cost.

Boomers are shifting away from traditional TV to ad-supported streaming.

Streaming TV has captured the attention of boomers in Italy.

70% of this age category are now watching streaming TV compared to 73% who watch broadcast TV, putting the two nearly on par.



86% of boomers who watch streaming TV content are watching with ads as compared to only 38% who watch ad-free content.



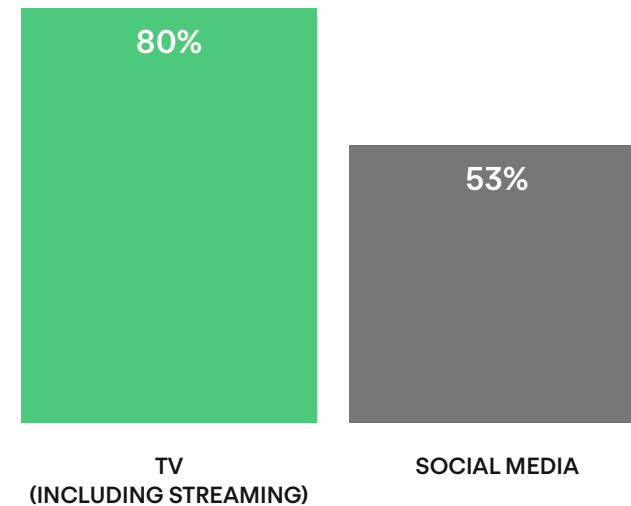
Italians trust TV (including streaming TV) more than social video, leading to greater ad recall.

TV is a vital part of Italian culture. Among Italians who watch ad-supported streaming content, they **watch an average of 18.5 hours of TV each week**, equating to over 2.5 hours a day.

By comparison, when it comes to their social video habits, 91% of consumers are watching videos that are only a few minutes or less.

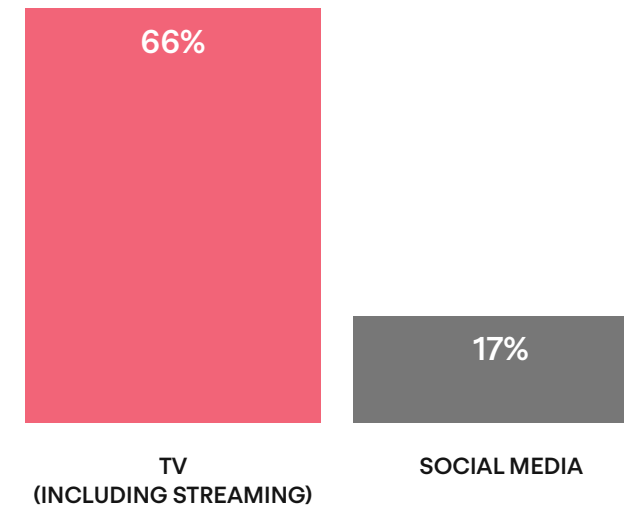
Their affinity for TV content is evidenced by the trust they place in ads within TV environments versus social media and their higher ad recall.

Ads within TV content are viewed as more trustworthy

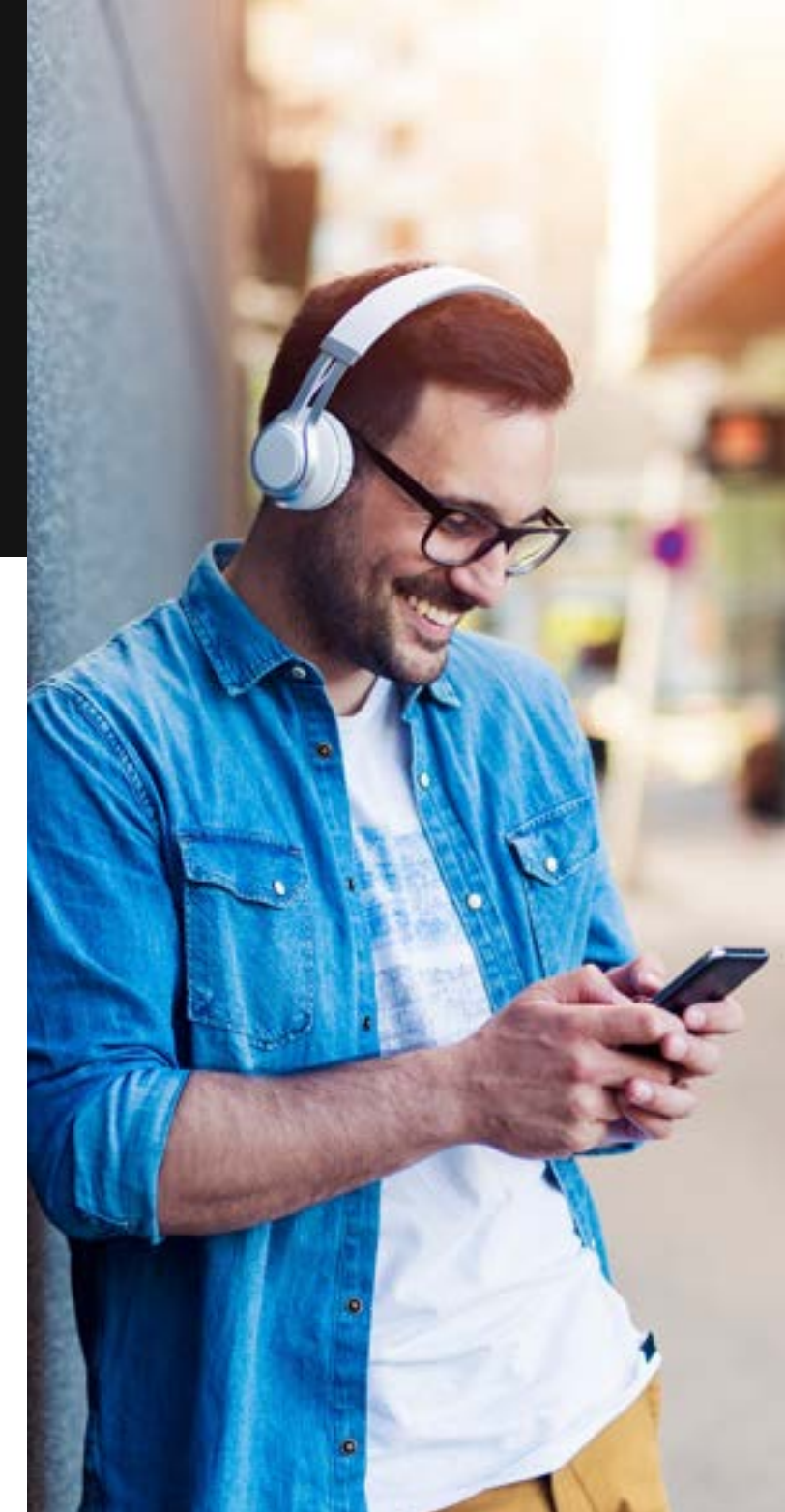


Q: To what extent do you find the ads on the following platforms trustworthy?
Base: Total respondents
Source: Magnite

Ads within TV content are remembered more

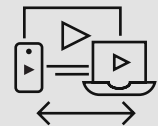


Q: Thinking of all the advertisements you have seen on the following platforms, which do you generally remember the most?
Base: Total respondents
Source: Magnite



Cross-device viewing drives action.

Italian streamers are watching TV content across devices, especially on mobile and on TV screens. Their exposure to advertising across screens builds greater engagement with brands and drives purchase intent.



78% of ad-supported streamers are more likely to make a purchase from a brand that they engaged with across multiple devices.

Cross-device TV consumption habits among streamers

TV SCREENS

95%



LAPTOP/DESKTOP

78%



SMARTPHONE/TABLET

79%



Q: In a typical week, how frequently do you use each of these to watch TV shows and films at home?
Base: Total streamers
Source: Magnite

Summary

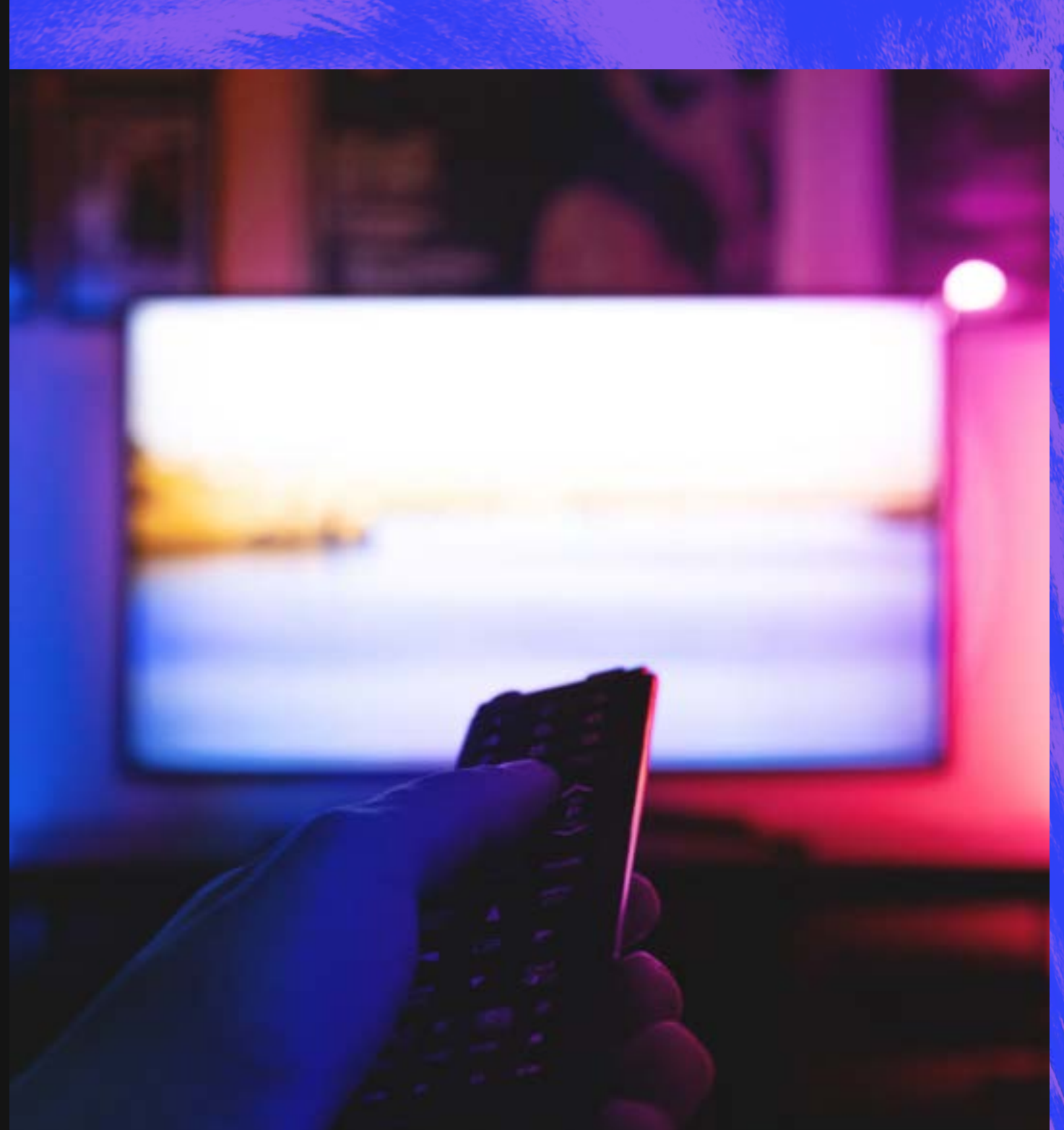
Ad-supported streaming TV is winning dominance in Italy as it continues to attract viewers from traditional TV.

Italy's high engagement with ad-supported content presents a prize opportunity for advertisers to deliver targeted messaging to highly receptive consumers at scale.



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Streaming TV's New Era

How Ads Are Powering
Streaming's Future in Spain

Magnite Research, 2023

Magnite



Spain Streaming Report



Introduction

In Spain, TV audiences are shifting their viewing away from traditional TV toward streaming TV.

Ad-supported viewing is the preferred way to watch and will drive future streaming growth in Spain.



Ad-supported content is watched by more streamers in Spain than ad-free.

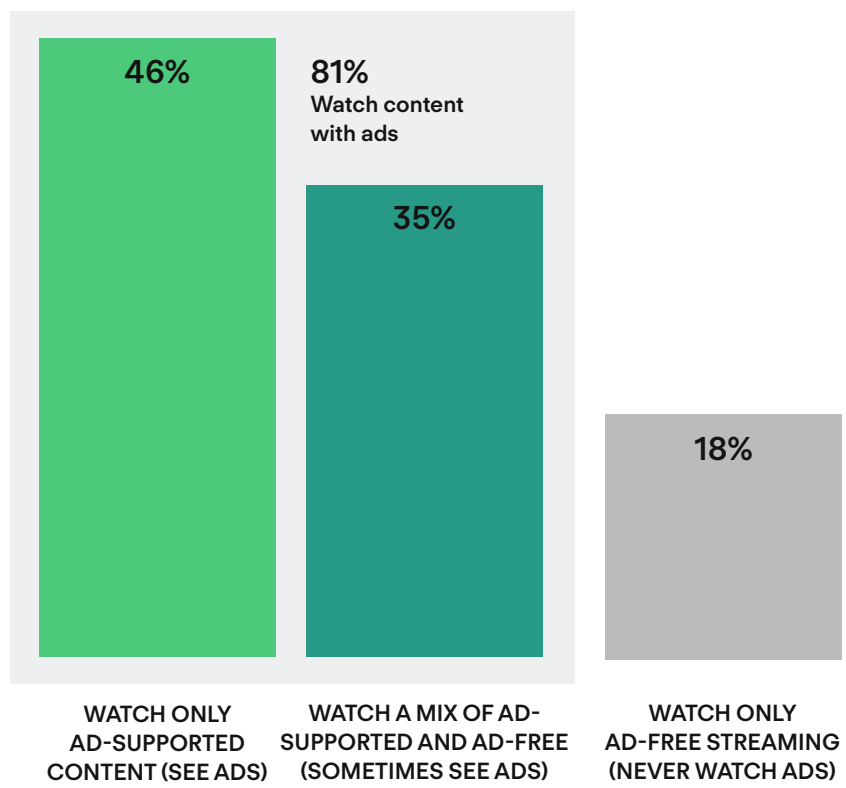
Streaming TV is watched by more people in Spain than any other form of television.

Viewers are spending less time watching broadcast TV. According to Barlovento Comunicació⁷, Spaniards' daily minutes watching free-to-air TV dropped 11% in 2022 vs. 2021.

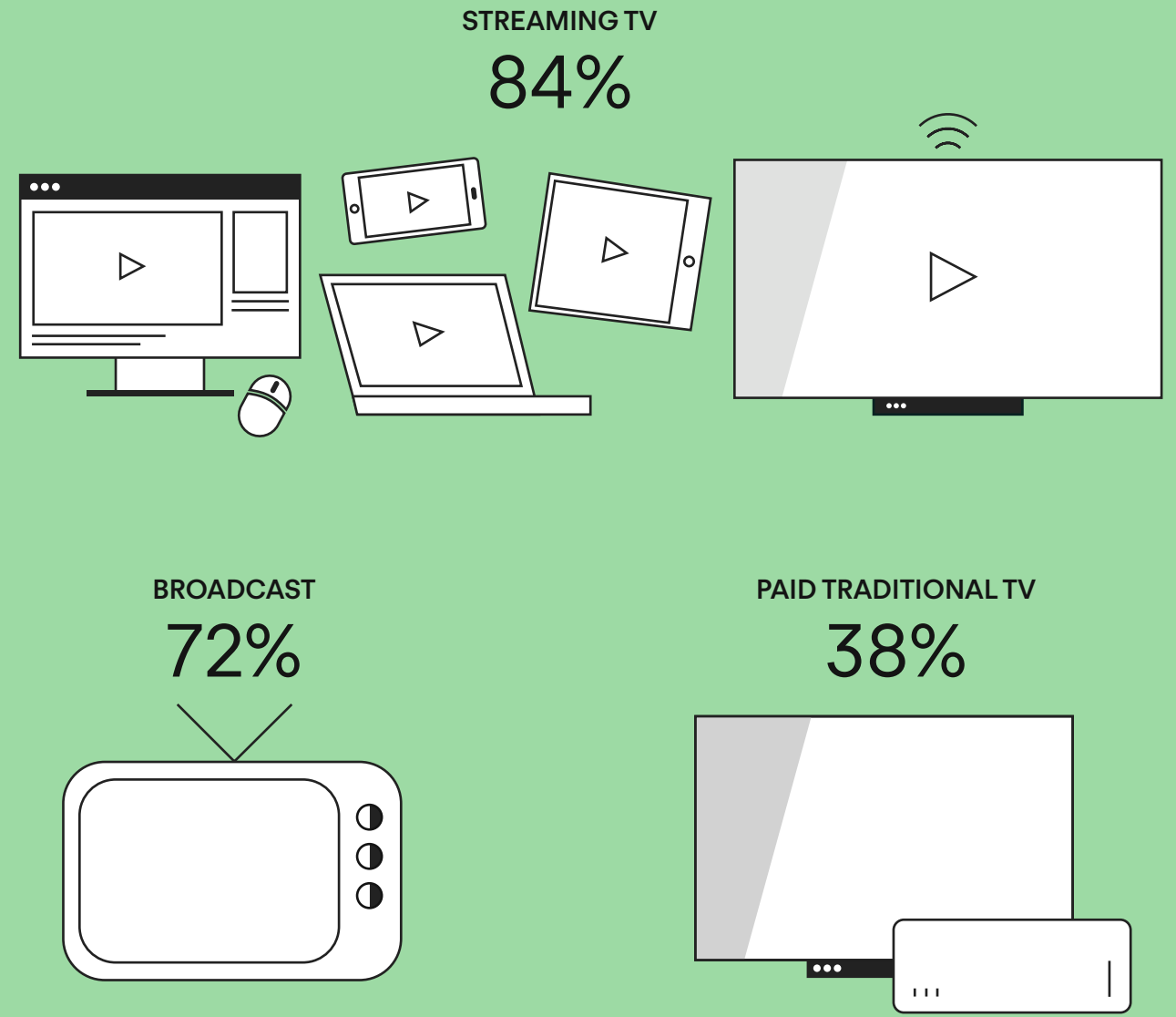
In Spain, streaming is dominated by ad-supported viewership. According to Magnite's research, **81% of streamers currently watch some form of ad-supported content.**

Q: Which of these following services do you use to watch TV shows and films?
 Base: Total streamers
 Sources: 7) Barlovento Comunicació; Magnite

8 in 10 streamers watch ad-supported content



Streaming TV is watched more than any other form of TV



Q: Which of these services do you use to watch TV shows and films?
 Base: Total respondents
 Source: Magnite

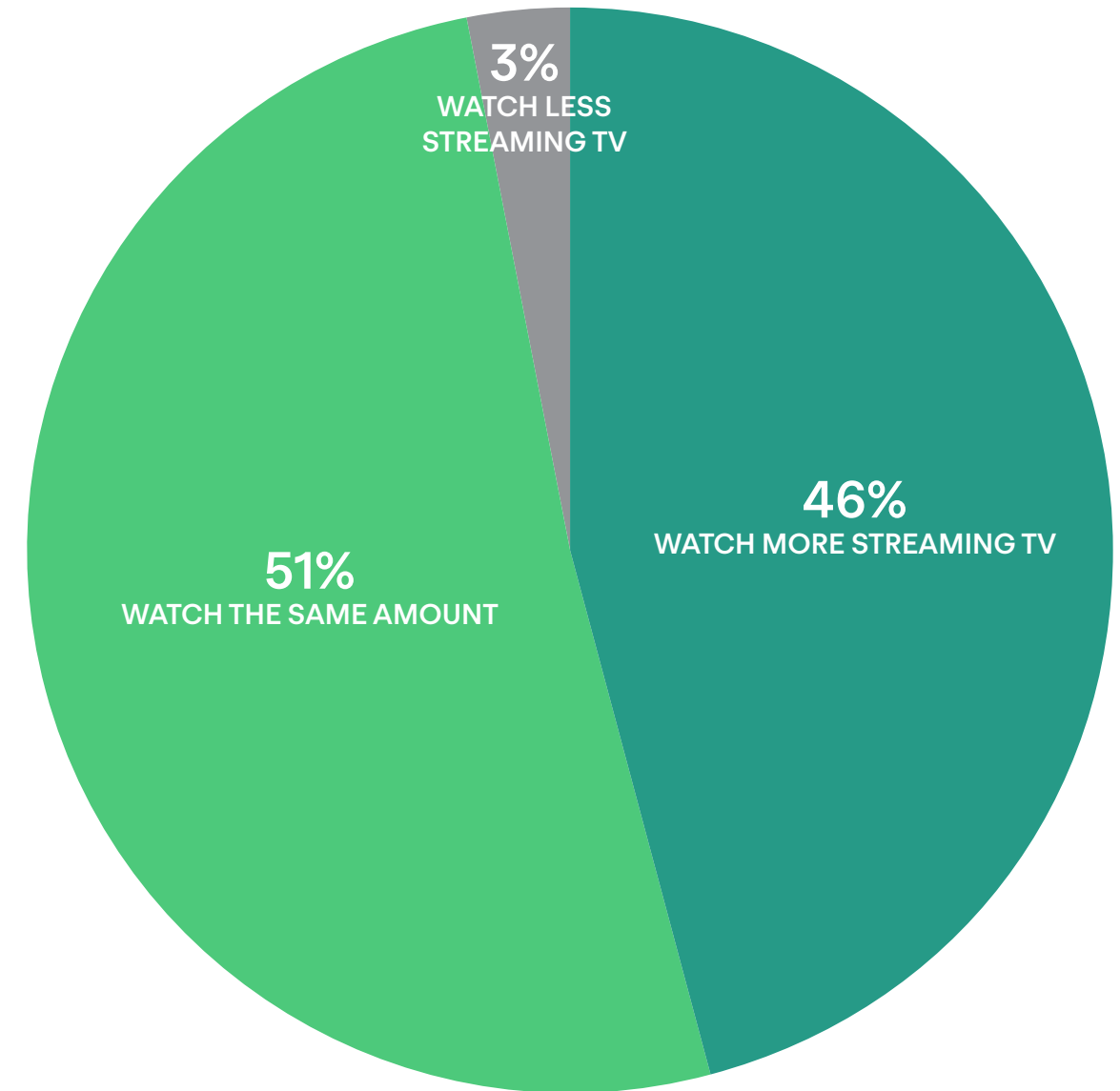
Ad-supported streamers are consuming more content than a year ago.

Spanish streamers are streaming more TV with ads than last year, indicating that ads are not disrupting their viewing experience.

According to our study, **46% are watching more content with ads** vs. only 3% who are watching less.



Increased consumption of ad-supported content vs. last year

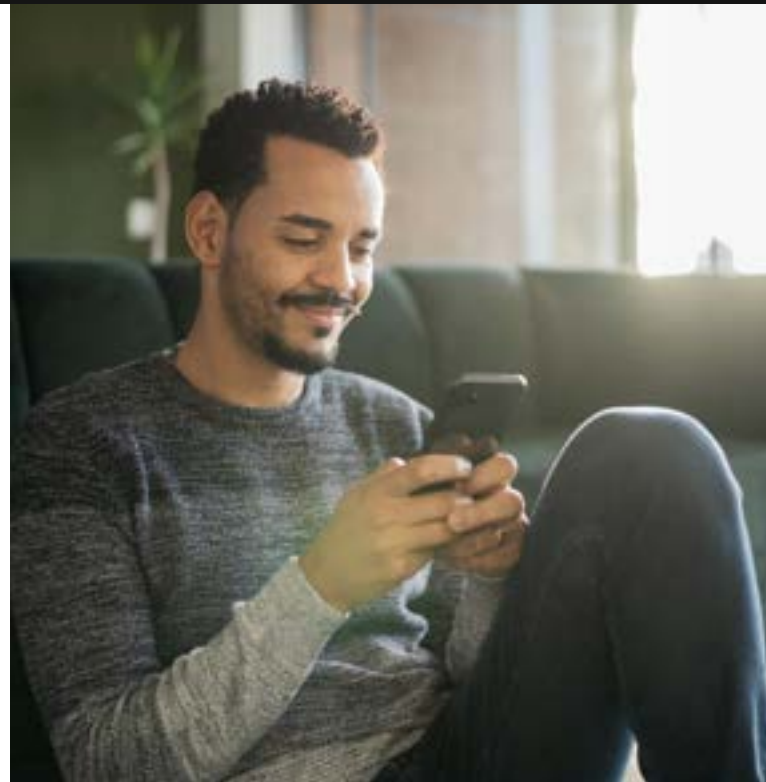


Q: Compared to one year ago, are you watching more or less streaming TV content, or has the amount remained the same?
Base: Total ad-supported streamers
Source: Magnite

Ad-supported content will likely drive streaming's overall growth.

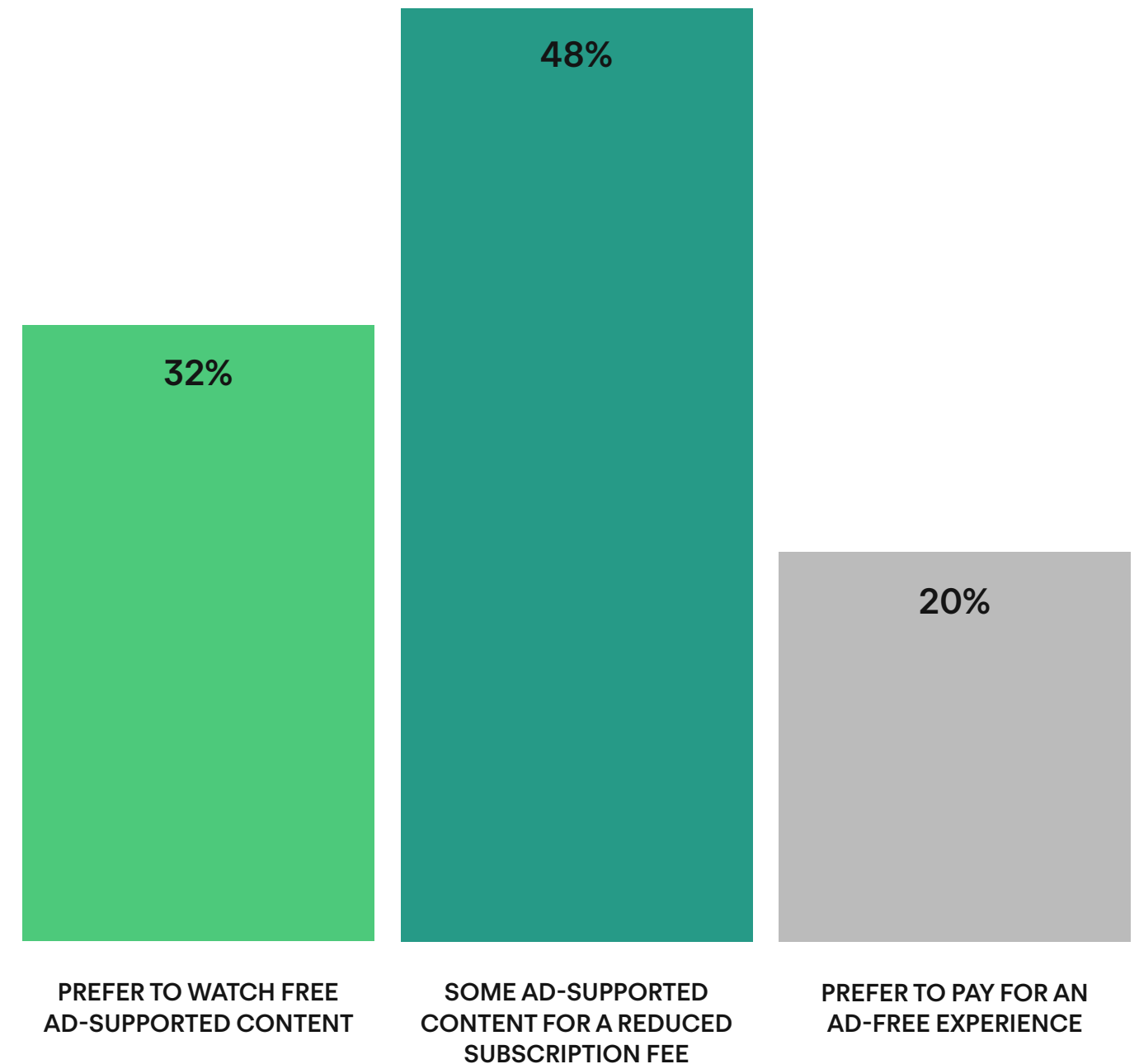
Ad-supported content will likely remain the preferred way to watch in Spain as more viewers shift to streaming TV.

A majority of Spanish TV viewers indicated they would choose to watch content with ads in exchange for free or reduced cost to access TV.



75% of TV viewers would use a new ad-based streaming service for a free or reduced-cost.

Viewers choose content with ads



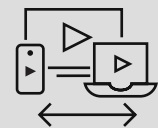
Q: In general, how do you feel about watching advertisements in exchange for free or reduced cost to access TV shows/films?
Base: Total respondents
Source: Magnite

Cross-device content consumption drives purchase behaviour.

In line with the EU5 region, streamers in Spain are watching content across multiple screens.

They also place significant value in the ads they see: **70% of streaming TV-only viewers trust the ads they see within TV content**, as compared to 55% of traditional TV-only viewers.

Spaniards' consumption across devices drives deeper connections with brands and influences purchase decisions.



82% of ad-supported streamers are more likely to make a purchase from a brand that they engaged with across multiple devices vs. 75% of traditional TV viewers.

Cross-device TV consumption habits among streamers

TV SCREENS

95%



SMARTPHONE/TABLET

75%



LAPTOP/DESKTOP

74%



Q: In a typical week, how frequently do you use each of these to watch TV shows and films at home?
Base: Total streamers
Source: Magnite

Summary

Spain is embracing streaming TV in a big way. Streaming viewers' increased ad consumption, combined with the high level of trust they place in ads within TV environments, creates a golden opportunity for brands looking to forge stronger connections with consumers and drive campaign impact.



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