



# ***THE NEW LIFE OF THE LIVING ROOM***

STUDY REPORT **2022**

An in-depth analysis of video content consumption behaviours in European households today.

**RTL/AdConnect** +



**smartclip**



# **CONTENTS**

## **EXECUTIVE STATEMENT**

By Stéphane Coruble, CEO of RTL AdConnect,  
and Dr Oliver Vesper, Co-CEO of smartclip

## **INTRODUCTION**

## **METHODOLOGY**

## **THE STUDY**

### **AN OVERVIEW OF EUROPEAN HOUSEHOLDS**

#### **DEVICE USAGE AND VIEWING BEHAVIOURS PER FOCUS GROUP**

Young (aged 18-34)

Family (people with children under 18)

Midlife (aged 35-64, no children in the household)

#### **DEVICE USAGE AND VIEWING BEHAVIOURS PER COUNTRY**

Denmark

Finland

France

Germany

Italy

The Netherlands

Norway

Spain

Sweden

United Kingdom

## **CONCLUSION**

## **ABOUT RTL ADCONNECT**

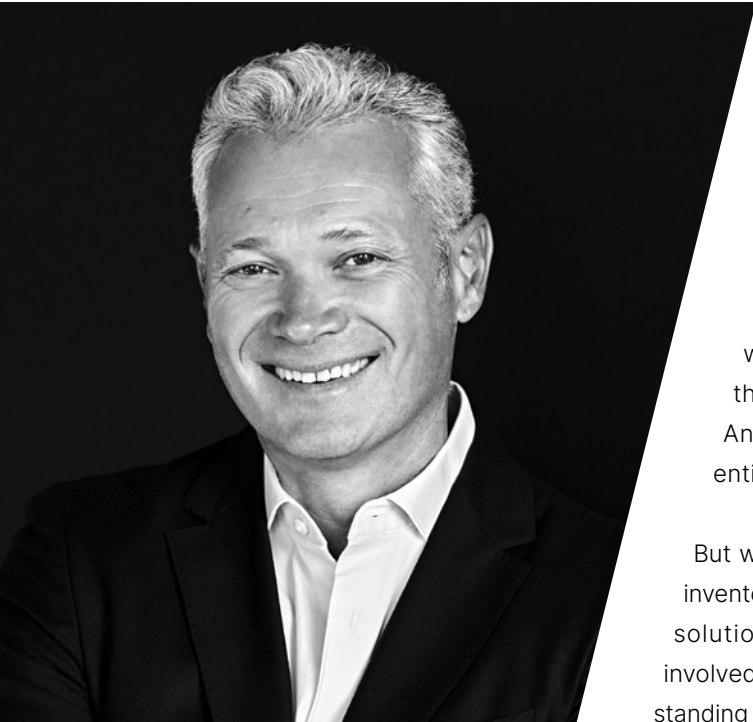
## **ABOUT SMARTCLIP**

## **AUTHORS**

## **CONTRIBUTORS**

## **CONTACTS**

# EXECUTIVE STATEMENT



**Stéphane Coruble,**  
CEO of RTL AdConnect

With an increasing number of screens, devices, and content offerings available, watching video content is now a more intrinsic part of our daily lives than it has ever been. As a reflection of this, a total video advertising approach across multiple screens and devices has become a fundamental element of every brand's marketing strategy. At smartclip and RTL AdConnect, we provide media groups and brands with advertising opportunities and adtech solutions that reach millions of potential consumers every day. And we work closely with stakeholders across the entire advertising ecosystem to facilitate this process.

But we know that connecting brands with advertising inventory is only part of the story. To ensure advertising solutions deliver impressive results for everyone involved, it is crucial that we all have a deep understanding of the people who play the most important role in that story – the viewers. In order to find and engage today's viewers, we need to know where they are, what they are doing, and how to capture their attention.

The viewing experience has always evolved at pace, but in recent years, a combination of circumstances has supercharged that evolution. The lockdowns saw our living rooms becoming the epicentre of a whole new lifestyle and our viewing devices becoming our window to the outside world. More accessible technologies have led to booming adoption rates for smart, connected devices, and many of us are creating cinema-style experiences in our homes. A proliferation of screens, platforms, and content has created numerous touchpoints and scattered our attention far and wide. And new adtech solutions are giving brands more opportunities for targeted ad delivery than ever before.

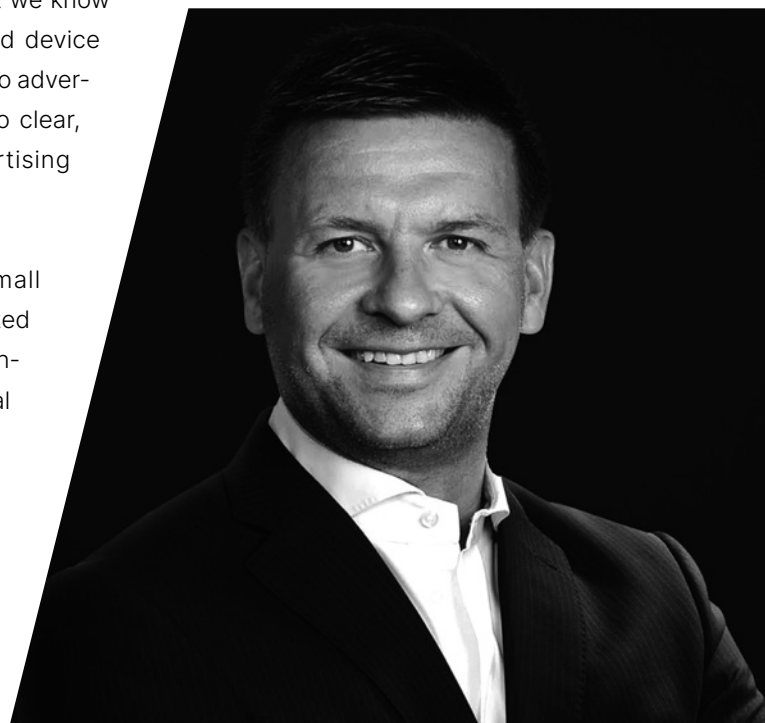
# “ In order to find and engage today’s viewers, we need to know where they are, what they are doing, and how to capture their attention. ”

It’s now clear that audiences are not just static target groups, they are individuals with needs, desires, and opinions that can shift and change in response to what is unfolding around them – personally, locally, nationally, and globally. A thorough understanding of these individuals and their media consumption behaviours is essential to the success of video advertising, and that is what we have aimed to provide by partnering on this brand-new research initiative. By drawing on the extensive industry expertise within smartclip and RTL AdConnect, we have jointly commissioned research that we know addresses the most important topics around device usage patterns, viewing habits, and attitudes to advertising, and we have translated the results into clear, relevant insights that everyone in the advertising ecosystem can benefit from.

Every day we are seeing brands large and small reaching their potential customers through targeted video advertising campaigns within premium environments. And now, by equipping everyone with this vital intelligence, we hope to make these incredible opportunities more accessible and successful for you all.

Whether you are an advertiser, a publisher, a media sales executive, an adtech professional, a distributor, a manufacturer, or a platform operator – we look forward to working alongside you in our journey to engage even more viewers in living rooms across Europe. /

**Dr Oliver Vesper,**  
Co-CEO of smartclip





# ***INTRODUCTION***

No matter where we live or who we are, the living room is the heart of our home. It's where we relax, share moments with our family or spend time alone, catch up on the latest events, and chat to family and friends, and it was our haven during the pandemic. Despite the now commonplace use of multiple viewing devices in households, the television – or 'big screen' – continues to be the focal point of our living rooms and our primary destination for watching video content. But with the proliferation of digital media, diversification of content offerings, and technological advances – combined with a pandemic that has had a lasting impact on our lifestyles and behaviours – the where, when, and how of the viewing experience is evolving.

From first thing in the morning to last thing at night, video content has the potential to reach people during every moment of their day-to-day lives, offering myriad opportunities for advertising to engage audiences in premium environments. But navigating this increasingly fragmented media landscape and our changing viewing behaviours presents a challenge – not just to advertisers and agencies, but to everyone working in the advertising ecosystem. Staying abreast of these evolutions is essential for the advertisers and agencies looking to streamline their media strategy, reach their target demographic, and create meaningful connections; for the supply-side professionals looking to efficiently monetise their portfolio, and for the adtech platforms, TV manufacturers, and distributors providing the infrastructure for content consumption.

To help us all better understand media consumption habits and usage behaviours in European households today, smartclip and RTL AdConnect commissioned research with Consumer Science & Analytics in ten countries. Taking place two years into the pandemic, a blend of quantitative and qualitative research explored key questions about device usage, viewing behaviours, and attitudes to advertising. Now we can present our findings – from a pan-European perspective and a demographic- and country-specific perspective – providing a unique snapshot of the New Life of the Living Room in 2022 and translating the results into actionable opportunities to reach today's viewers. /

**As soon as  
I am in the  
living room,  
the TV  
is on.**

**David,**  
France (Midlife)



# METHODOLOGY

A combination of qualitative and quantitative research was decided on as the ideal approach for this research initiative.

## Qualitative research

Qualitative research involved in-depth interviews (one hour) followed by one week of tracking media consumption behaviour via WhatsApp. This research was carried out in the UK, France, and Germany in November-December 2021. Based on three focus groups, it included six households in each country (two per target group).

## Focus groups

### YOUNG

(AGED 18-34)



### FAMILY

(PEOPLE WITH CHILDREN UNDER 18)



### MIDLIFE

(AGED 35-64, NO CHILDREN IN THE HOUSEHOLD)



## Quantitative research

Based on the findings of the qualitative research, quantitative research was then carried out in February 2022 via fieldwork in ten European countries (Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Spain, Sweden, UK). More than 8,500 people participated – 700-1,000 participants per country – answering 16 questions to provide extensive quantitative data.

## Measures taken to ensure confidentiality and anonymity

Consumer Science & Analytics is a member of the Chambre Syndicale des Sociétés d'Études et de Conseil (SYNTEC) and is held by professional secrecy and applying the article of the SYNTEC deontology code. All personally identifiable information was void in written findings and names of people surveyed were replaced with pseudonyms. Voluntary and informed consent was obtained from all people surveyed. /

**3**  
FOCUS GROUPS

**QUALITATIVE RESEARCH**

**6**  
HOUSEHOLDS  
IN EACH COUNTRY

**3**  
EUROPEAN COUNTRIES

**QUANTITATIVE RESEARCH**

**10**  
EUROPEAN COUNTRIES

**8,500+**  
PARTICIPANTS

**700-1,000**  
PARTICIPANTS PER COUNTRY

**16**  
QUESTIONS





# ***AN OVERVIEW OF EUROPEAN HOUSEHOLDS***

Before looking more closely at our focus groups and individual countries, it is important to first get an overall snapshot of European households. In this section, we explore how device usage, viewing behaviours, and attitudes to advertising are evolving in living rooms across Europe.

## ***WHAT DEVICES DO THEY OWN?***

Most European households are fully equipped with multimedia devices – not only do they have televisions, smartphones, and computers, they also connect or plug devices into their televisions. Smart TVs have become the predominant standard in most countries, with 71% owning a smart TV (except France where 64% of households own a classic TV) and 79% connecting their TV devices to the internet. France, however, does have a comparatively higher number of set-top boxes from internet service providers (ISPs) (57%) than some other countries, indicating that they are still connecting these classic TVs to the internet.

***“*** You no longer have to go to the cinema for a cinema experience.

Vivian,  
Germany (Family)

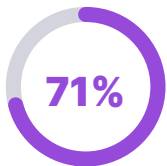


# It's more than just a television nowadays.

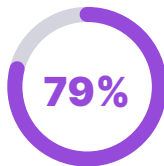
Richard,  
UK (Midlife)



**9 out of 10 people** have a TV set in their household.



own a smart TV.



connect their TV device to the internet via a wired (Ethernet) or Wi-Fi connection.

*A vast majority of our TV devices are smart TVs, and more than half of them are new – purchased in the last two years.*

Across all countries, smart TVs were the most popular choice when purchasing a new TV device. When asked about their recent TV device purchases, 55% had bought a smart TV in the last two years, with 30% buying the device in the last 12 months. The highest percentage of recent smart TV purchasers was found in Italy, where 68% had purchased a smart TV within the last two years.



**55%** had bought a smart TV in the last two years.

The TV device has become the focal point of the living room, with room decor often organised around it. Europeans are also expecting more from their TV devices, with many investing in high-tech devices – 43% stated that they would do everything to have an optimal viewing experience (big screen, projector, home cinema, etc.). And when those who had bought a smart TV in the past 12 months were asked what their main motivation to buy was, 39% wanted a bigger screen, 32% wanted a better image quality, and 38% wanted it smarter, with better access to connected features. The requirement for connected features has accelerated during the pandemic, with 48% reporting that they are using more connected features on their TV than they did before the pandemic.

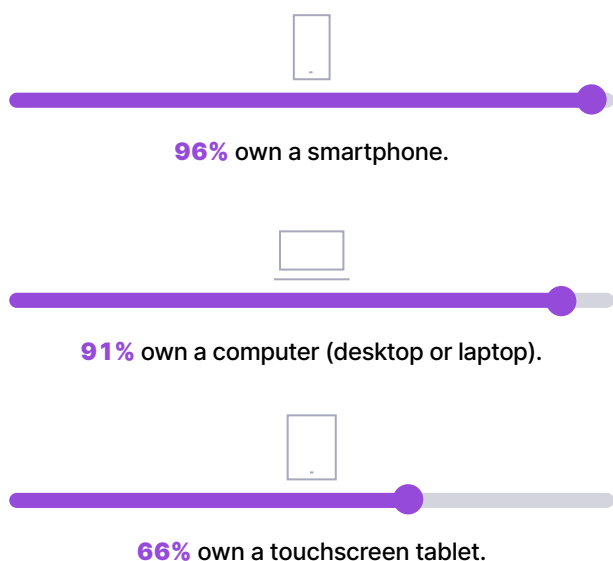


**39%**

of recent smart TV purchasers cited wanting a bigger screen as their main motivation for buying.

When looking beyond TV device ownership, smartphones and computers are almost as ubiquitous in European households as TVs, indicating that competition with other screens is growing. The percentage of households owning smartphones was high in all countries – ranging from 93% in the UK to 98% in Finland. Similar numbers were reported for computers (desktop or laptop) – ranging from 85% in the UK to 95% in France.

*The variety of screens and content offered allows everyone to maximise the personalisation of TV consumption, with all members of the household exposed to individualised content every day.*



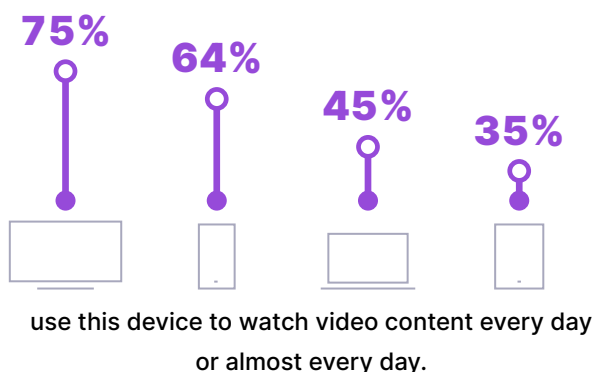
## WHERE, WHEN, AND HOW – WHAT DOES THE VIEWING EXPERIENCE LOOK LIKE IN EUROPE TODAY?

*Most people use the TV – the ‘big screen’ – every day and a majority of people spend more time watching video content on TV than on other devices.*

For the majority of respondents, the TV is the primary device on which to watch video content – 60% spend more time watching video content on their TV than on other devices. And, across all countries, the living room is the favourite place to watch TV, rather than in another room on a TV device or another device. When respondents were asked what device they use for viewing video content every day or almost every day, 75% regularly watch video content on their TV. However, the smartphone comes in at a close second overall for this regular viewing at 64%, and in the Young focus group, the smartphone pushes the TV into second place for regular viewing, with 72% using their smartphones and 68% using TVs.

**60%**

watch video content more on the TV than other devices.

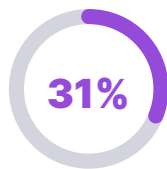


**85%**

watch video content on a TV device in the living room.



During the pandemic lockdowns, TV consumption surged and further diversified across multiple platforms as we sought entertainment, connection, and information. When surveyed close to two years on from the beginning of the pandemic, just under a third reported that they are watching more content than before the pandemic, while two thirds stated that their content consumption was now similar to what it was before. The countries that saw the biggest increase in TV consumption were Italy (39% of respondents watching more than before) and Spain (42%).



watch more video content on TV than they did before the pandemic.

In all countries, whether on a weekday or weekend, the peak time for watching video content is in the evening. The percentage of respondents in each country who said they watch TV in the evening on weekdays ranged from 70% to 80%. And these percentages are only slightly lower for weekend evenings, from 58% to 71%.

*Watching TV is often seen as a way to relax – people watch after work or later in the evening to wind down, or they watch in bed before sleep, instead of reading books.*



**74%** watch video content on TV on weekday evenings.



**64%** watch video content on TV on weekend evenings.

Three main types of viewing experience were identified – gathering, relaxation, and companionship. Watching video content is a ritual that gathers families, couples, and friends together, with 75% enjoying the moment with family and friends. More than half of respondents (54%) reported that, since the health crisis, they have shared more family moments while watching TV. Video content is also used for companionship and relaxation, with 60% reporting that they mostly watch video content on their own and 46% always turning on the TV at home for background noise. The TV offers a comforting presence, helping people to feel less isolated, perhaps while working from home during the pandemic, and it provides a relaxing background rhythm to daily activities – for example, watching a 30-minute episode while preparing a meal. People often like to watch content that they don't need to focus on – for example, familiar series that they've seen before such as *Friends* or *The Simpsons*, morning shows, talk shows, or reality shows.

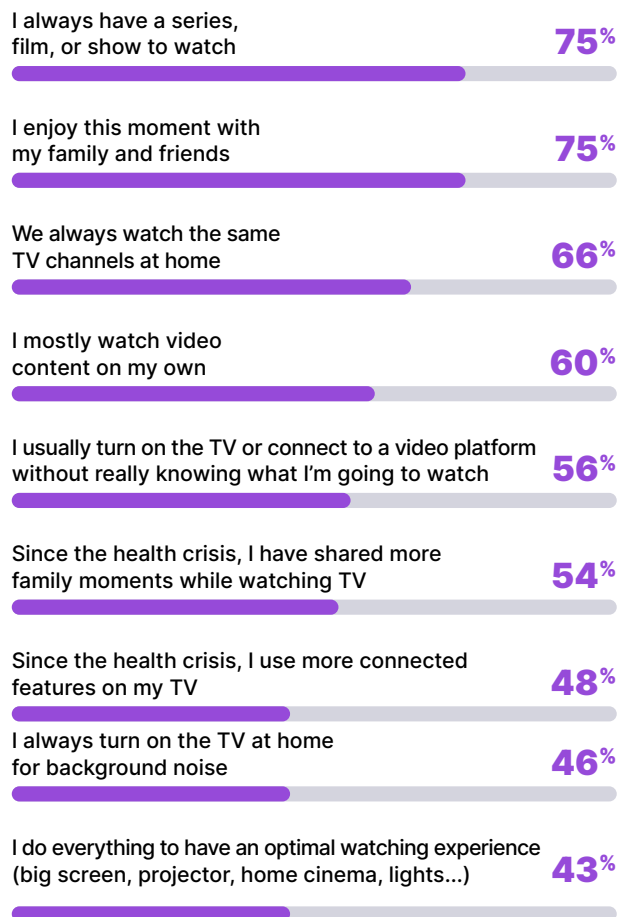
*Watching TV in the living room brings families and couples together – they anticipate it and make a ritual out of it with snacks and popcorn.*

**A great moment of togetherness – five friends eating pizza in front of the TV!**

Tristan,  
France (Young)

*People are naturally inclined to watch TV to relax. It is part of our daily habit, without thinking about it, we turn our screens on as a reflex.*

Watching video content is a constant source of entertainment for many – whether they know what they want to watch or not. When asked about their viewing habits, 75% reported that they always have a series, film, or show to watch, but at the same time, 56% usually turn on the TV or connect to a video platform without really knowing what they're going to watch.



When looking at daily viewing habits, Live TV beats other sources in every country – but the number of respondents reporting that they watched Live TV every day or almost every day fluctuates from 37% in Germany to 65% in France. The qualitative research in the UK, France, and Germany indicated the possible reasons for these differences. In the UK and Germany, respondents stated that they primarily use Live TV to watch important live events such as elections and sports, or they put on Live TV news or morning shows as a background to daily life. But in France, many viewers see Live TV shows as unmissable events – they prefer to watch these shows live so they can connect with others on social media as they happen and discuss them with their friends, colleagues, and family. This activity was also observed in Germany, but only for *Tatort*.

**52%**

watch video content via Live TV channels  
every day or almost every day.

**37%**

watch video content via SVOD platforms  
every day or almost every day.

Subscription-based Video-on-Demand (SVOD) platforms are the second most popular viewing destination in many countries, and they compete strongly with Live TV when looking at daily viewing habits in Germany, Denmark, Norway, and Sweden. Offerings from on-demand platforms can be seen as clearer and more flexible than linear TV – they offer a variety of easy-to-access choices thanks to smart TVs, and viewers can choose any content at any time.

**I find it even more pleasant at home than in the cinema... Why should I spend 15€ per ticket if I can stream the film here for 15 or 20€ and then the three of us watch it?**

**Vivian,**

Germany (Family)

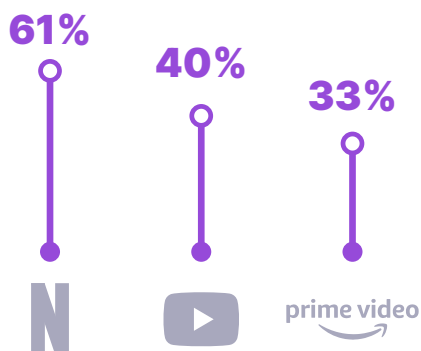


***Children influence TV-related choices at every level, from the platforms subscribed to (e.g. Disney+), to the content and ads watched.***

Most households are now dedicating budgets to SVOD platforms and spending time on catch-up/Broadcaster Video-on-Demand (BVOD) platforms, with many seeing SVOD and occasionally buying or renting Video-on-Demand (VOD) as a cheaper alternative to going to the movies – and also more comfortable and enjoyable.

Netflix is ahead of other competitors in most countries, except in Italy, where it is beaten by Amazon Prime Video, and Finland, where Yle Areena takes the top spot. Amazon Prime Video comes in at a close second in Germany and Spain. The second most important viewing destinations are catch-up TV/BVOD platforms including BBC iPlayer in the UK, MyTF1/France.tv/6play in France, ARD/ZDF Mediatheken in Germany, Videoland in the Netherlands, Ruutu in Finland, and TV2 Play/TV4 Play/Viaplay in Scandinavian countries. Amazon Prime Video (as a companion service to Prime delivery), YouTube, and Disney+ (as a children’s content specialist, this platform is considered mandatory by many families) are important platforms in most countries, with YouTube taking second or third spot in many countries.

On which platform do you regularly watch video content?

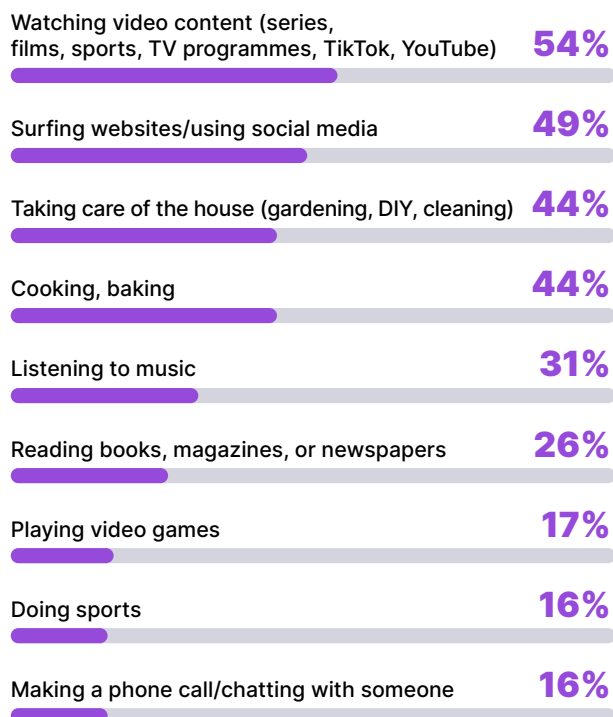


## HOW DOES TV FIT IN WITH OTHER HOME-BASED ACTIVITIES?

When respondents were asked about the three main activities they did at home, watching video content was at the core of home activities, with 54% including it in their top three. It was the most popular top-three choice in all countries except Italy and Germany, with other popular top-three choices including another screen-based activity – surfing websites/using social media – alongside taking care of the house, and cooking/baking. The only countries where watching video content was not the most popular top-three choice were Italy, where surfing websites/using social media shared the top spot, and Germany, where watching video content took fourth place behind taking care of the house, cooking/baking, and surfing websites/using social media.

*The home is more important than it has ever been, and our screens are at the core of our home activity.*

Among the following activities, what are the three main activities you do the most at home?



## HOW DO EUROPEAN VIEWERS REACT TO ADVERTISEMENTS?

Respondents were asked about their attitude to advertisements when watching video content. Each ranked their answers from 0 (ads were not annoying) to 5 (ads were very annoying). Advertisements on Advertising-based Video-on-Demand (AVOD) platforms (also known as free VOD platforms) were reported to be the least annoying, with fewer people giving higher scores. Only 45% scored their annoyance levels regarding ads on AVOD platforms at 4 or 5, compared with 56% on Live TV channels, 50% on catch-up TV/BVOD, 52% on social networks, and 59% on video-sharing sites such as YouTube.

As we relax in front of our big screens, many of us are ‘double screening’ – checking our smartphones during ad breaks or even during the show itself. Overall, advertisements are avoided, and viewers disconnect from watching TV during the ad breaks – with reactions to ads including that they are intrusive, too loud, break the mood with off-topic products/styles, too repetitive or too frequent, or the ad breaks overall are too long.



**83%** check their phone systematically or from time to time during an ad break.

**// So, a targeted advert [...] puts the things that I’m likely to be searching for and may not even find otherwise in front of me, like that particular scanner!**

Dave,  
UK (Family)



There is potential to reduce this negativity around TV advertising, however, as over one third of TV viewers are open to receiving targeted ads that better suit their interests. This interest was even higher among Families (44%) and the Young (49%) when compared to the average, indicating that if viewers are offered products or services that interest them, they could be more engaged and positive regarding targeted ads. In Italy, almost half of respondents were open to being exposed to targeted ads. To stand out, ads need to be interesting and memorable; have movie-quality production; be catchy with enjoyable twists, fun and wit; and preferably feature feel-good content. Overall, they need to be ‘content’ themselves, not just a vehicle to sell products. /

**38%**

are definitely or probably interested in receiving targeted ads.



# **DEVICE USAGE AND VIEWING BEHAVIOURS PER FOCUS GROUP**

The in-depth research carried out highlighted a number of differences among the three focus groups in terms of device usage/technical set-up, media consumption behaviours, and attitudes to advertising. Summary data and key findings for each focus group are outlined here, many of which will be an important consideration for any advertiser planning a video advertising campaign targeted at these groups.



## **YOUNG**

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(AGED 18-34)



## **FAMILY**

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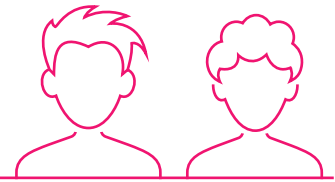
(PEOPLE WITH  
CHILDREN UNDER 18)



## **MIDLIFE**

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(AGED 35-64, NO  
CHILDREN IN THE  
HOUSEHOLD)



# YOUNG

(AGED 18-34)

***The Young are TV addicts – the TV is on independently of what they're doing.***

When looking at the devices used to watch content every day or almost every day, the Young are the only group where smartphones, on average, push the TV device into second place – with 72% using their smartphones to watch content, compared to 68% using TVs. The only countries where TV devices are more popular among the Young are Denmark and Norway.

## LEADING PURCHASERS OF SMART TVs

65% have bought a smart TV in the last two years (European average: 55%), compared with 58% in the Family target group and 47% in the Midlife target group.

## PANDEMIC INCREASED THE USE OF CONNECTED FEATURES

On average, 56% have been using more connected features on their TV since the pandemic, but there were notable differences between countries, with larger proportions of the Young focus group in Italy (73%) and Spain (70%) increasing their use of connected features, compared with countries such as Norway (45%) and Sweden (46%).

## HIGHEST INCREASE IN VIEWING TIME SINCE PANDEMIC

35% of respondents in the Young focus group spend more time watching content now than they did before the pandemic, a higher proportion than both other focus groups and the European average of 31%.

## ABOVE AVERAGE MORNING VIEWING

Similar to other focus groups, the evenings are the most popular time for watching TV among the Young. However, the percentage watching content in the morning is above average, with 11% watching content during the morning (weekdays or weekends), compared with the European average of 8%. The Young are also the most likely group to say that they watch content all day long at no specific time.

# YOUNG

(AGED 18-34)

## TV IS THE BACKGROUND TO EVERYDAY LIFE

54% always turn the TV on at home for background noise, higher than other focus groups (Family: 47%, Midlife: 42%) and the European average (46%). In addition, 66% usually turn on the TV or connect to a platform without knowing what they're going to watch, which is again higher than other focus groups (Family: 61%, Midlife: 47%) and the European average (56%).

## HIGHEST USE OF SVOD PLATFORMS

91% access SVOD platforms – the highest among all focus groups. Netflix is the most popular, with 73% using the platform regularly, followed by Disney+ (37%), Amazon Prime Video (35%), and HBO Max (17%). SVOD was also the most popular destination for regular viewing among the Young, with 48% watching SVOD platforms every day or almost every day, compared with 35% for Live TV and 35% for video-sharing sites such as YouTube.

## WATCHING VIDEO CONTENT IS THE MOST POPULAR TOP-THREE PASTIME

59% ranked watching video content in their top-three at-home activities (higher than the European average of 54%), with surfing websites/social media the closest contender at 49%.

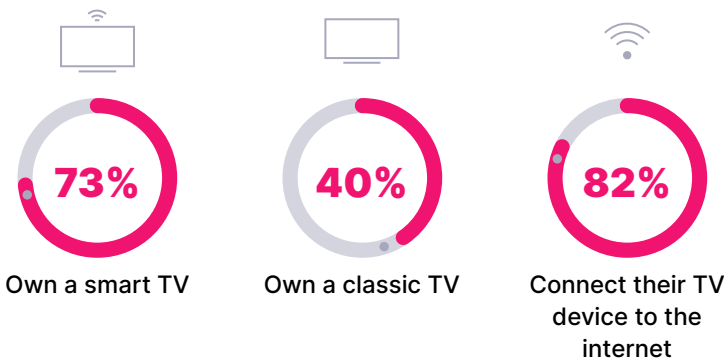
## AVOD AND BVOD LEAST ANNOYING FOR ADS

The Young focus group's level of acceptance of ads varies between platforms – 61% ranked ads as annoying on video-sharing sites such as YouTube, but this percentage decreased to 46% on BVOD platforms and 40% on AVOD platforms.

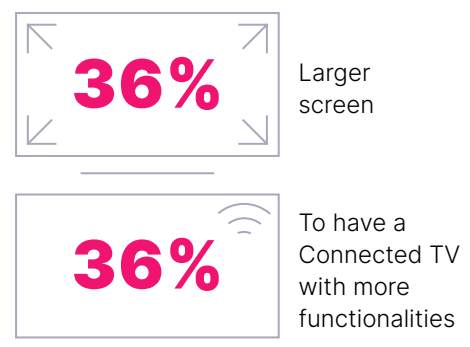
## HIGHEST INTEREST IN TARGETED ADS

49% expressed interest in receiving targeted ads, the highest percentage across the three focus groups and higher than the European average of 38%.

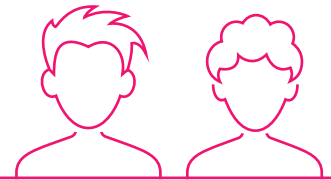
## TECHNICAL SET-UP



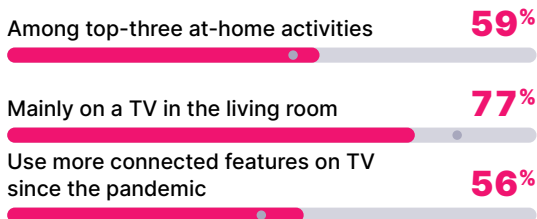
## Main motivation for buying a smart TV



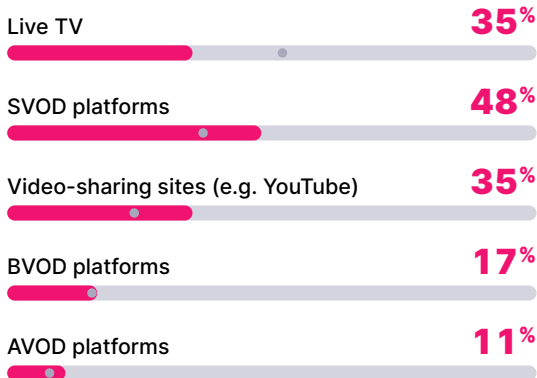
● Compare each statistic with European average, represented by the grey dots.



## CONSUMPTION OF VIDEO CONTENT



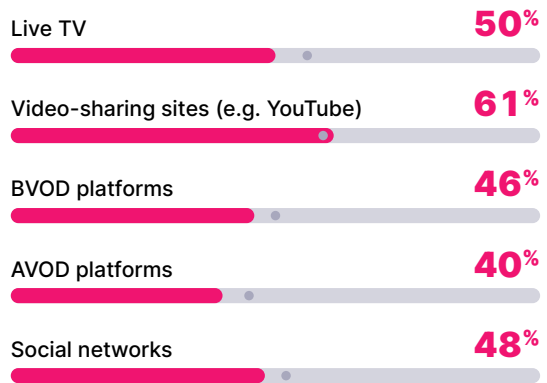
### Watch every day or almost every day



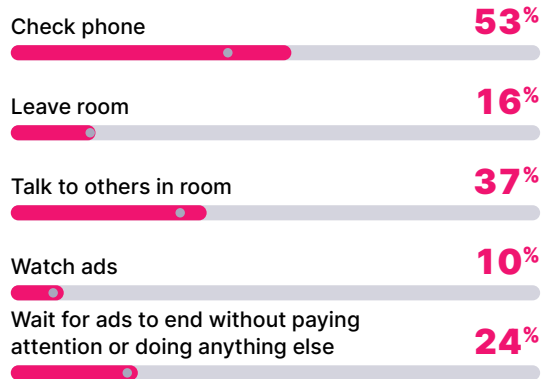
## PERCEPTION OF ADVERTISING



Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



**49%**  
open to targeted advertising

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# FAMILY

(PEOPLE WITH CHILDREN UNDER 18)

*For the Family focus group, the living room is where they enjoy time with their kids.*

Despite the proliferation of devices/screens in households, the TV in the living room continues to be the Family focus group's primary destination for watching video content, with 85% citing this as their main place and device for watching TV.

## TV CENTRAL TO MORE SHARED FAMILY MOMENTS

65% of the Family focus group agreed that the pandemic had led to them sharing more family moments while watching TV.

## ABOVE AVERAGE ON INCREASED VIEWING TIME SINCE PANDEMIC

33% of respondents in the Family focus group are spending more time watching content than they were before the pandemic, compared with the European average of 31%.

## WATCHING VIDEO CONTENT IS THE MOST POPULAR TOP-THREE PASTIME

51% of the Family focus group ranked watching video content in their top-three at-home activities. This was the highest proportion across all activities but was lower than the European average (54%) and was closely followed by taking care of the house (50%), surfing websites/social media (48%), and cooking/baking (48%).

## ABOVE AVERAGE USE OF SVOD PLATFORMS

In the Family focus group, 89% regularly access SVOD platforms, higher than the European average of 81%. Netflix is the most popular at 69%, followed by Amazon Prime Video (38%), Disney+ (33%), and HBO Max (15%).

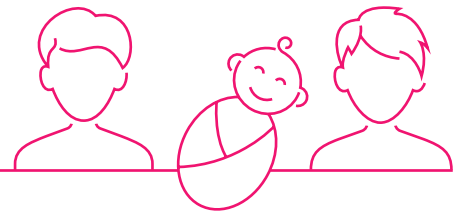
## AVOD LEAST ANNOYING FOR ADS

44% of respondents in the Family focus group ranked ads as annoying on AVOD platforms, compared with 60% on video-sharing sites such as YouTube.

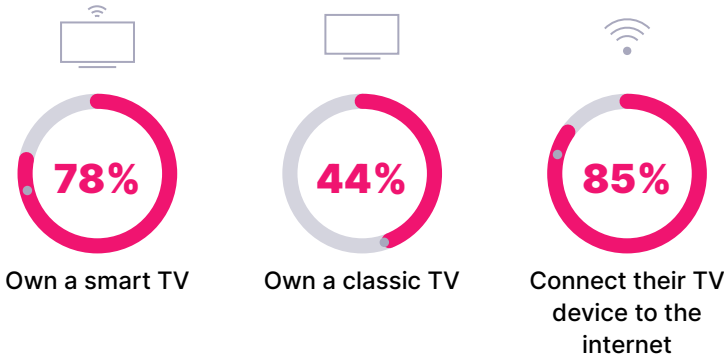
## ABOVE AVERAGE INTEREST IN TARGETED ADS

44% of the Family focus group expressed interest in receiving targeted ads, higher than the European average of 38%.

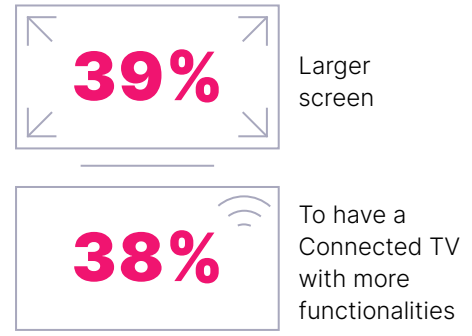
● Compare each statistic with European average, represented by the grey dots.



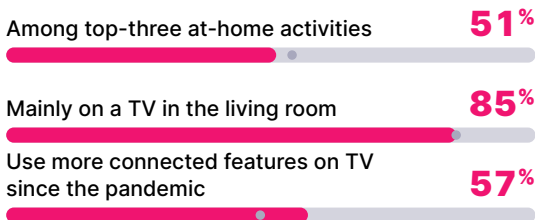
## TECHNICAL SET-UP



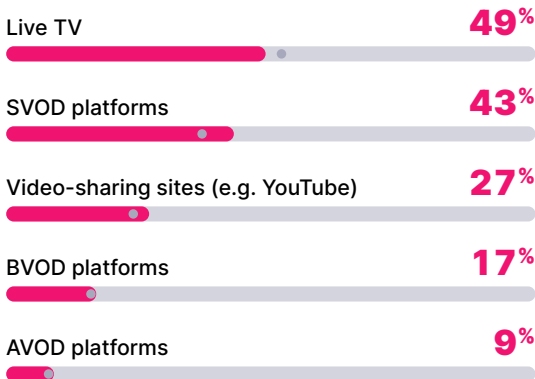
## Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

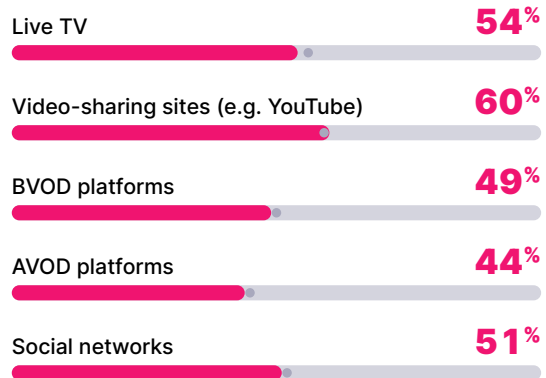


**44%** open to targeted advertising

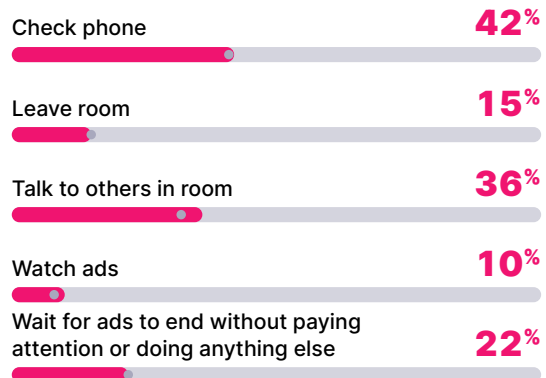
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



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# MIDLIFE

(AGED 35-64, NO CHILDREN IN THE HOUSEHOLD)

*The living room is a cosy refuge for the Midlife focus group.*

When comparing each focus group's preferred destination for regular viewing, respondents in the Midlife focus group were the biggest fans of Live TV, with 64% watching content on Live TV every day or almost every day, compared with the European average of 52% and with other focus groups (Young: 35%, Family: 49%).

## LOWEST PROPORTION OF SMART/CONNECTED TV OWNERS

Although the majority of the Midlife focus group own a smart TV (65%) and connect their TV to the internet (74%), these were the lowest percentages across all focus groups and lower than the European averages of 71% and 79% respectively.

## LEADERS FOR MAINLY WATCHING TV IN THE LIVING ROOM

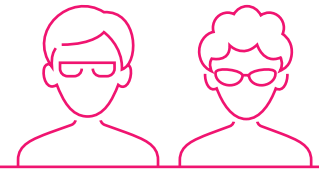
Among all three focus groups, the Midlife focus group led on preferring to watch content on a TV device in the living room, with 88% citing this as their primary destination for watching content.

## TV MOST PREFERRED DEVICE BY FAR

When compared with other focus groups, the Midlife focus group showed the biggest preference for watching content on their TV device, with 67% watching more on their TV than on other devices. Looking at regular viewing habits, 78% say they watch video content on their TV every day or almost every day, compared with 58% for smartphones, 44% for computers, and 34% for tablets.

## STRONGEST GROUP FOR EVENING VIEWING

The Midlife focus group surpasses the other focus groups – particularly the Young – when it comes to evening viewing. 77% watch content during weekday evenings, compared with 67% of the Young (European average: 74%). At the weekends, 69% watch content in the evenings, compared with 53% of the Young (European average: 64%).



**It's part of your life. Really, I just couldn't imagine life without TV.**

**Clare,**  
UK (Midlife)



### **WATCHING VIDEO CONTENT IS THE MOST POPULAR TOP-THREE PASTIME**

52% of the Midlife focus group ranked watching video content in their top-three at-home activities, compared with 49% who included surfing websites/social media in their top three, and 48% who included taking care of the house.

### **BELOW AVERAGE USE OF SVOD PLATFORMS**

Although a high proportion (69%) of the Midlife focus group regularly access SVOD platforms, it is the lowest percentage of all three focus groups and lower than the European average of 81%. As with all other groups, Netflix is the most popular at 48%, followed by Amazon Prime Video (27%), Disney+ (14%), and HBO Max (11%).

### **ABOVE AVERAGE ANNOYANCE FOR ADS ON MOST PLATFORMS**

When compared with other focus groups and the European average, higher percentages in the Midlife focus group ranked ads as annoying across Live TV, BVOD (Catch-up), AVOD, and Social media.

### **LEAST INTEREST IN TARGETED ADS**

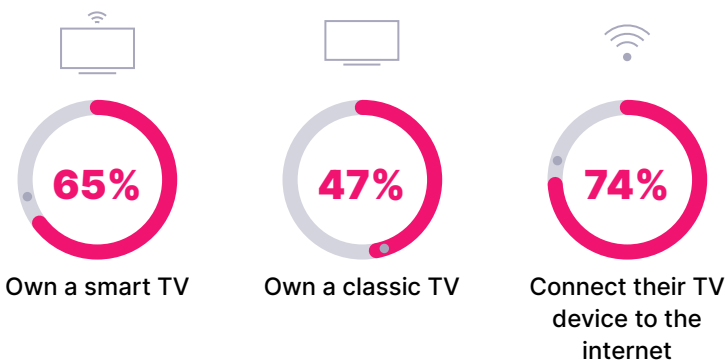
28% of the Midlife focus group expressed interest in receiving targeted ads, the lowest percentage across the three focus groups and lower than the European average of 38%.

• Compare each statistic with European average, represented by the grey dots.

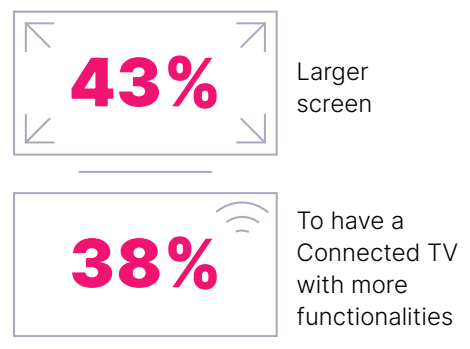
# MIDLIFE

(AGED 35-64, NO CHILDREN IN THE HOUSEHOLD)

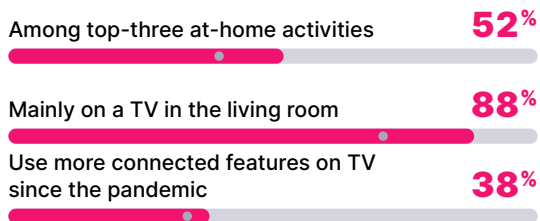
## TECHNICAL SET-UP



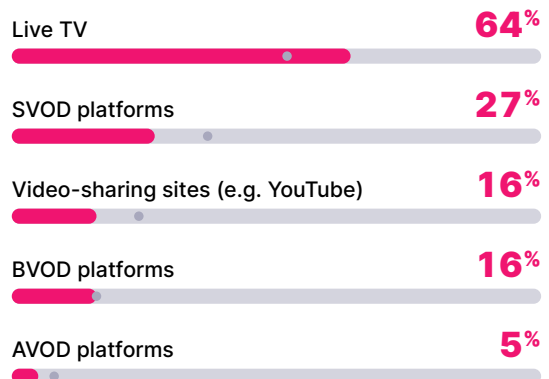
## Main motivation for buying a smart TV

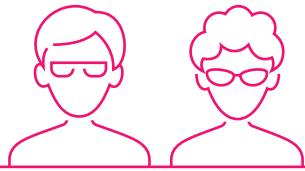


## CONSUMPTION OF VIDEO CONTENT



## Watch every day or almost every day

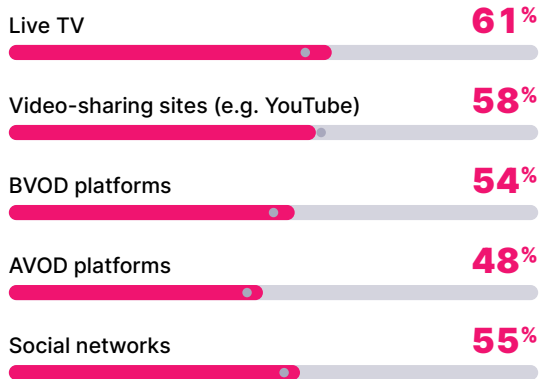




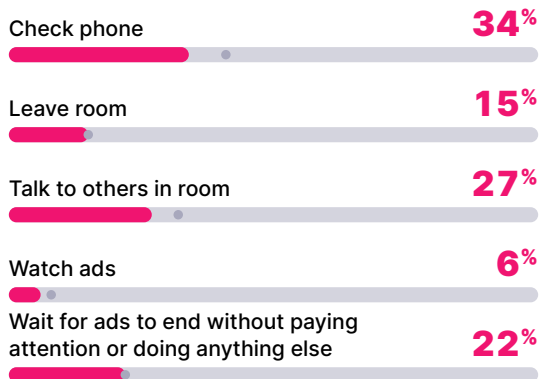
## PERCEPTION OF ADVERTISING



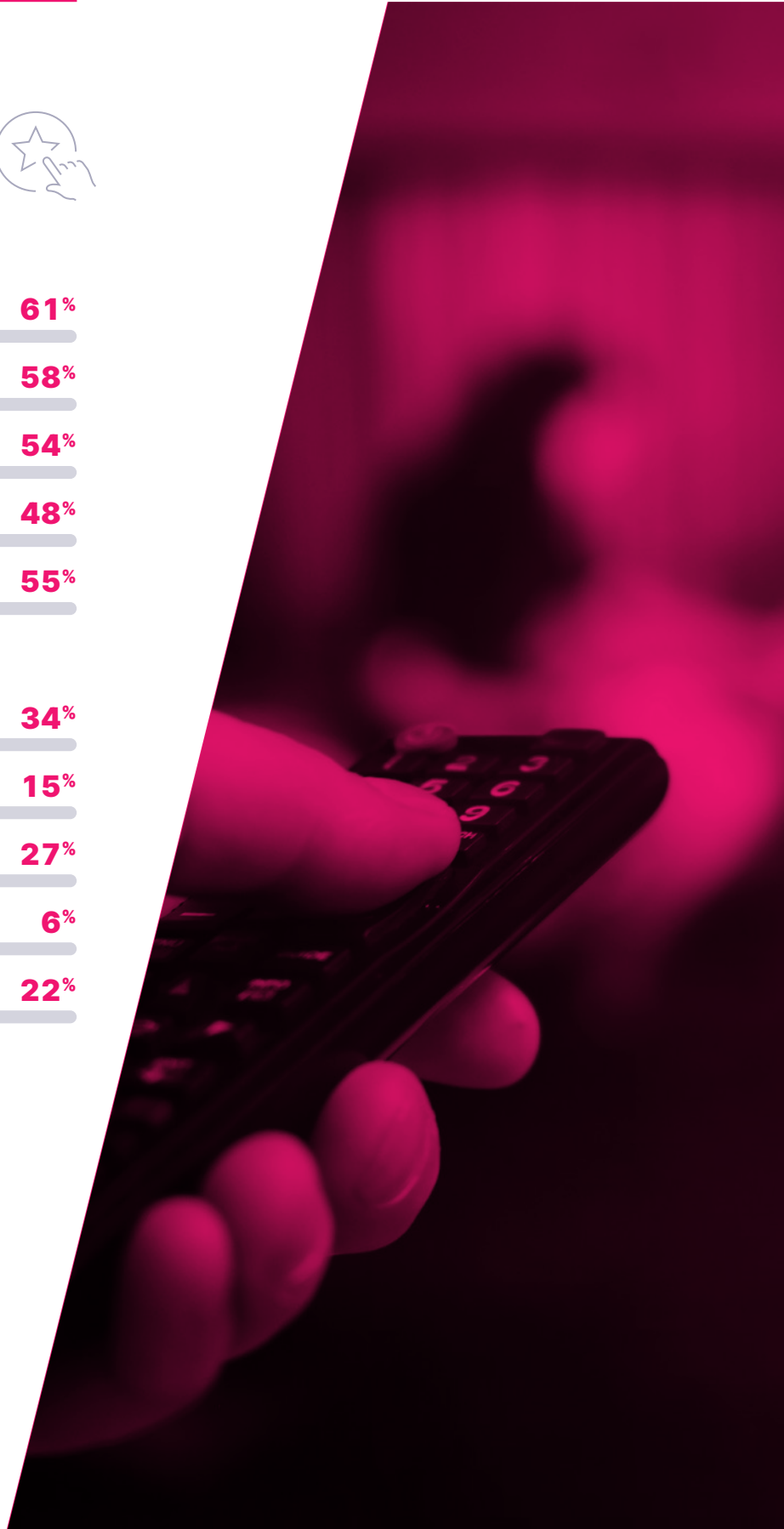
**Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)**



**Habits during ad breaks**



**28%**  
open to targeted advertising





# **DEVICE USAGE AND VIEWING BEHAVIOURS PER COUNTRY**

While the previous analysis has prioritised Europe as a whole, the research carried out across each of the 10 countries surveyed also allows for a more country-specific focus. Summary data and key findings – similar to the previous section – for each country are outlined here, offering vital insight for advertisers planning video advertising campaigns either in their own territory or across several European territories.

-  DENMARK
-  FINLAND
-  FRANCE
-  GERMANY
-  ITALY
-  THE NETHERLANDS
-  NORWAY
-  SPAIN
-  SWEDEN
-  UNITED KINGDOM



# DENMARK

Watching video content is a popular family pastime in Denmark, with 87% of Danish respondents in the Family focus group enjoying watching video content with their family and friends (European average: 75%).

## ABOVE AVERAGE OWNERSHIP OF SMART TVs

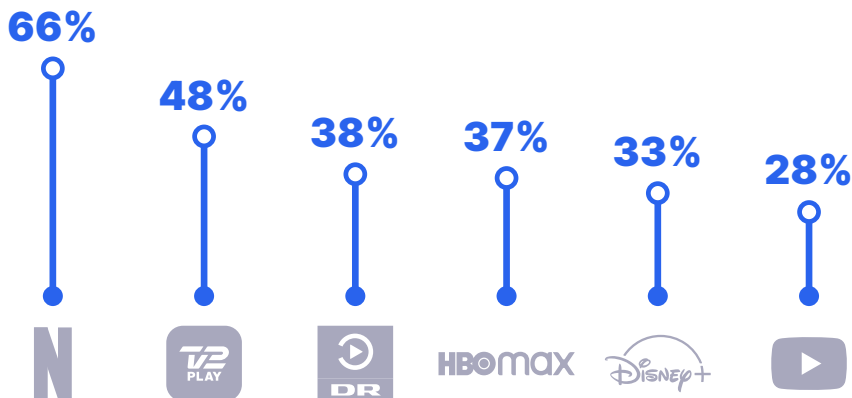
74% of Danish research participants had a smart TV, slightly higher than the European average (71%). The highest ownership was among the Family focus group at 81%, with the Young and Midlife focus groups both at 71%.

## BELOW AVERAGE INTEREST IN TARGETED ADS

Danes expressed some reluctance when it comes to targeted ads – 33% said they would be interested in receiving them, compared with the European average of 38%.

## NETFLIX LEADS PLATFORM USAGE

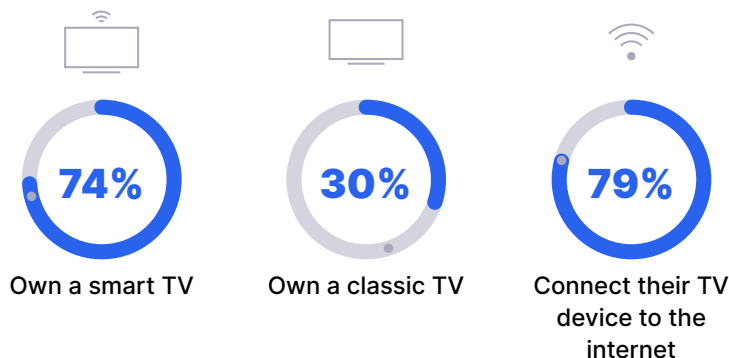
The most popular platforms watched regularly are Netflix (66%), TV2 Play (48%), DR TV Play (38%), HBO Max (37%), Disney+ (33%), and YouTube (28%).



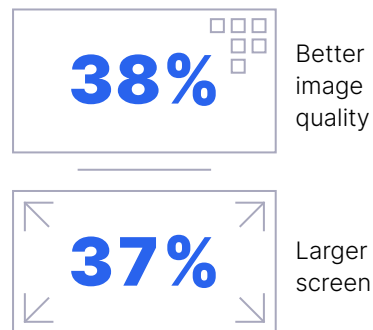


• Compare each statistic with European average, represented by the grey dots.

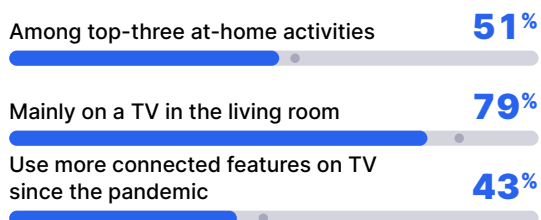
## TECHNICAL SET-UP



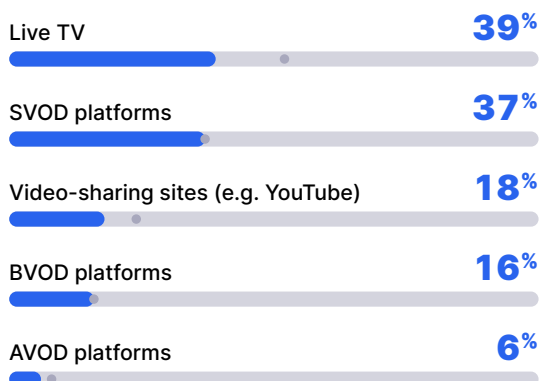
### Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

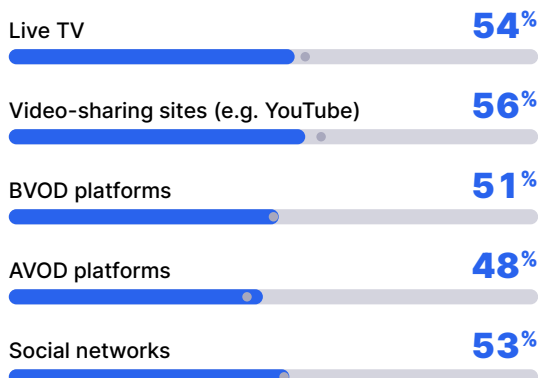


**33%** open to targeted advertising  
(European average: 38%)

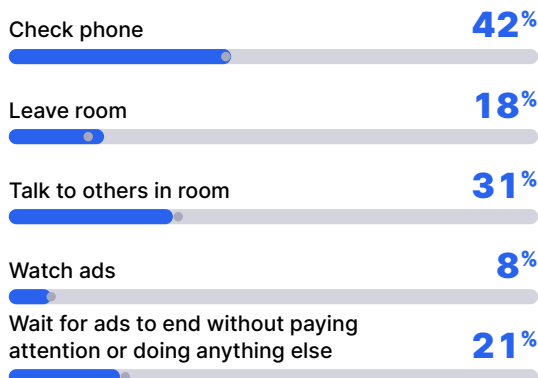
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# FINLAND

Watching video content is a key at-home activity in Finland, with 60% naming it as one of their three main at-home activities (compared with 54% European average).

## BELOW AVERAGE OWNERSHIP OF SMART TVs

69% owned a smart TV (European average: 71%). Smart TV ownership was highest among the Family focus group (81%), followed by Young (72%), and Midlife (62%).

## BVOD PLATFORM YLE AREENA LEADS PLATFORM USAGE

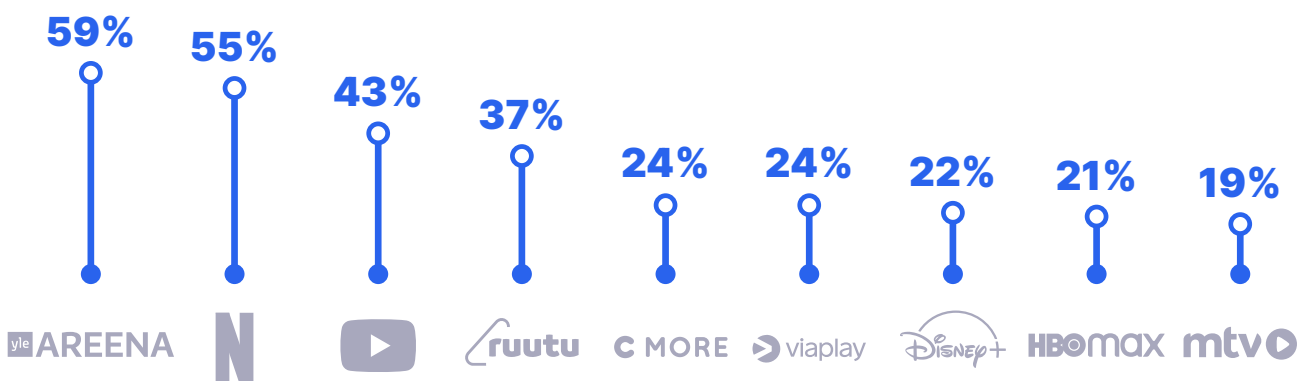
The most popular platforms watched regularly are Yle Areena (59%), Netflix (55%), YouTube (43%), Ruutu (37%), C More (24%), Viaplay (24%), Disney+ (22%), HBO Max (21%), and Mtv Palvelu (19%).

## ABOVE AVERAGE FOR FAMILY VIEWING

In the Family focus group, 86% enjoy watching video content with family and friends, compared with the European average of 75%.

## VIDEO-SHARING SITES SUCH AS YOUTUBE PARTICULARLY ANNOYING FOR ADS

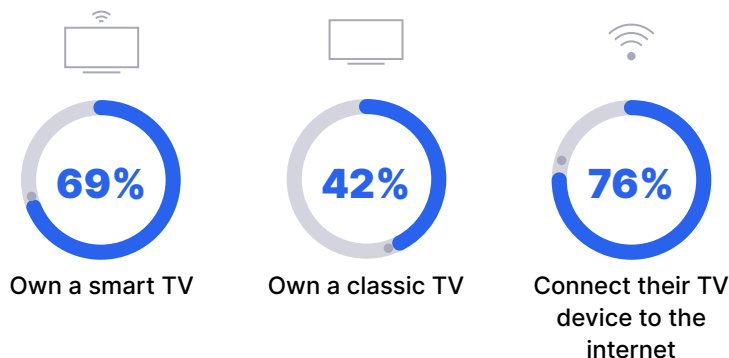
66% of Finns ranked ads as annoying on video-sharing sites such as YouTube (European average: 59%).



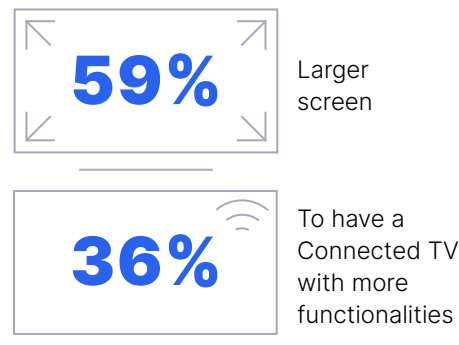


• Compare each statistic with European average, represented by the grey dots.

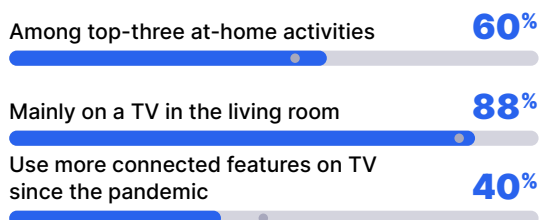
## TECHNICAL SET-UP



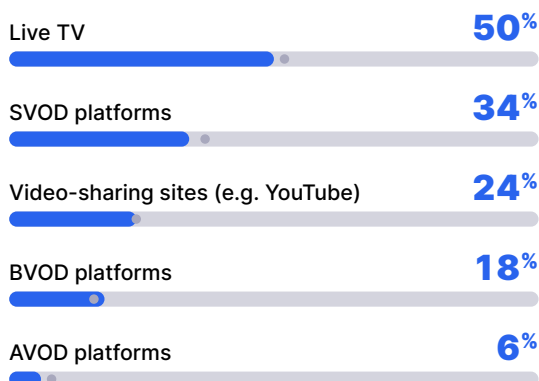
### Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

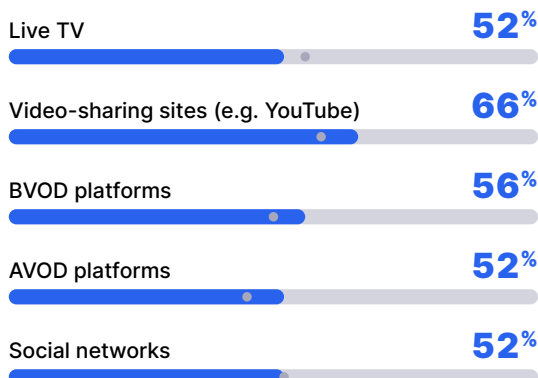


**36%** open to targeted advertising  
(European average: 38%)

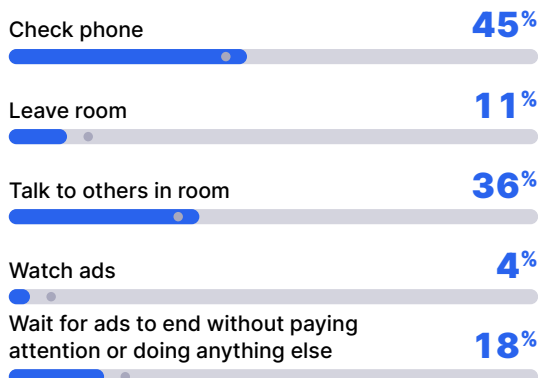
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# FRANCE

At 49%, France has the lowest ownership of smart TVs (European average: 71%), but it does have a high penetration of set-top boxes from an ISP at 57% (European average: 32%), indicating that the French are connecting their classic TVs to the internet.

## LEADERS IN SPENDING MORE TIME WATCHING CONTENT ON TV DEVICE THAN ON OTHER DEVICES

Although a comparatively low percentage of respondents in France (51%) name watching video content as one of their main at-home activities (European average: 54%), when they do watch video content, they represent the highest percentage (compared with other countries), at 65%, who spend more time on their TV than on other devices (European average: 60%).

## NETFLIX TOPS PLATFORM USAGE

The most popular platforms watched regularly are Netflix (54%), MyTF1 (36%), YouTube (33%), France.tv (32%), Amazon Prime Video (31%), 6play (30%), Canal+ (20%), Disney+ (20%), and Arte.tv (16%).

## ABOVE AVERAGE FOR FAMILY VIEWING

In the Family focus group, 79% enjoy watching video content with family and friends, compared with the European average of 75%.

## UNMISSABLE TV EVENTS DRIVE THE POPULARITY OF LIVE TV

65% of respondents in France watch Live TV every day or almost every day – the highest percentage across

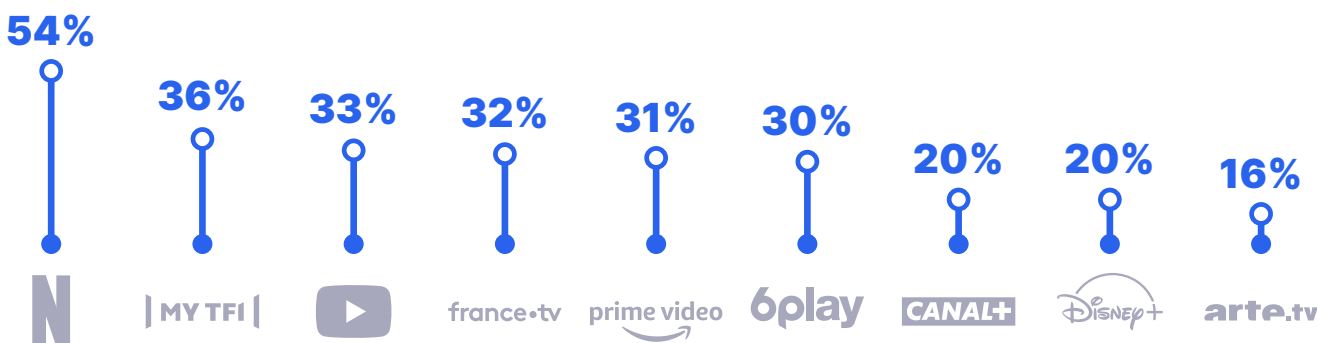
Europe. In France, the live broadcasts of certain shows become big unmissable events – moments they must watch live so they can discuss them with family and friends.

## LIVE TV IS PARTICULARLY ANNOYING FOR ADS

64% expressed annoyance at ads on Live TV (European average: 56%).

**The living room is where we get together. Sometimes we arrange the couches to create a big, big bed where everybody can fit with blankets.**

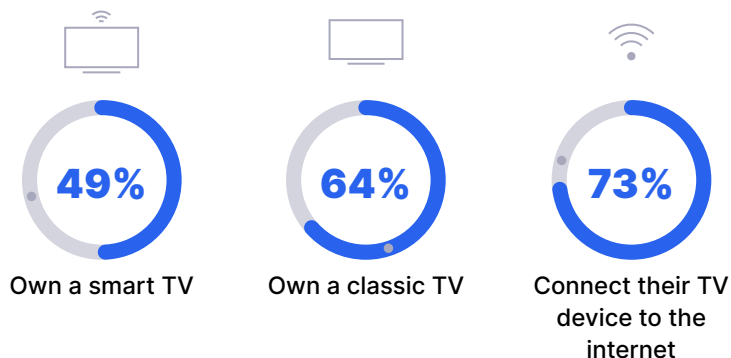
Valérie,  
France (Family)



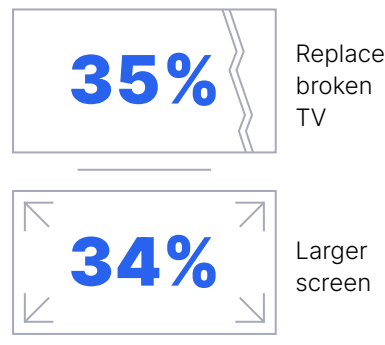


• Compare each statistic with European average, represented by the grey dots.

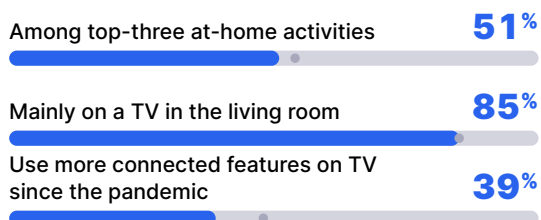
## TECHNICAL SET-UP



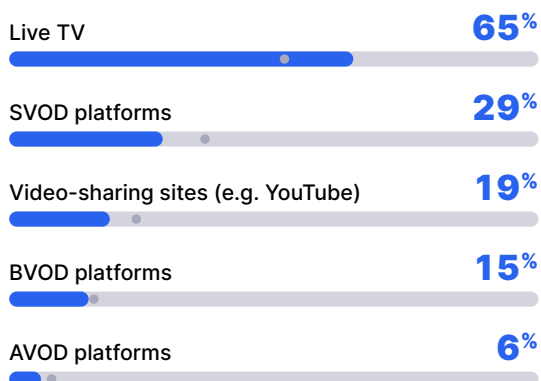
### Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

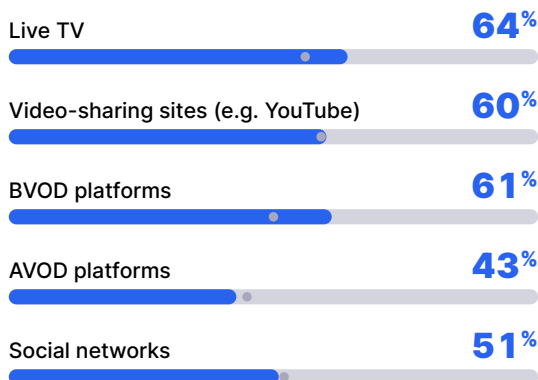


**33%** open to targeted advertising  
(European average: 38%)

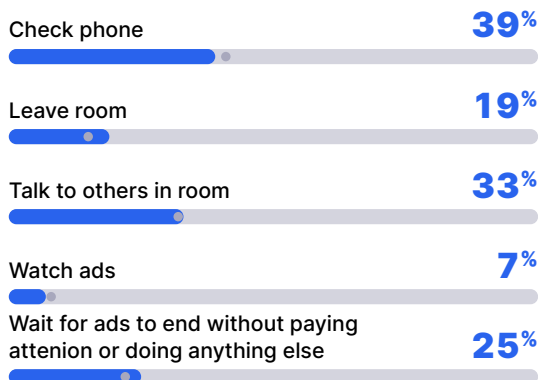
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# GERMANY

Watching video content brings German families together, with 87% in the Family focus group enjoying watching video content with family and friends, compared with the European average of 75%.

## HIGH PERCENTAGE FOR EVENING VIEWING, BUT OTHER AT-HOME ACTIVITIES TAKE PRIORITY OVERALL

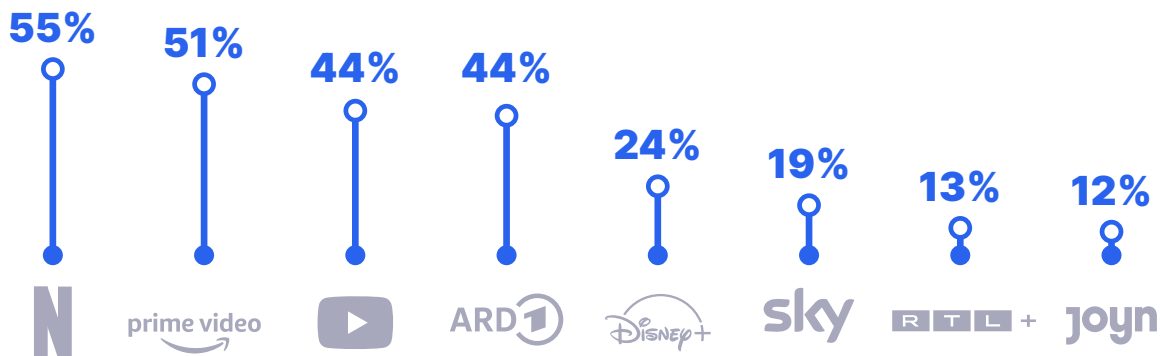
80% of German respondents watch video content on weekday evenings – the highest percentage Europe-wide – but other at-home activities are considered more important overall. Only 41% included watching video content in their three main at-home activities (the lowest percentage of all countries). Many prioritised taking care of the house, cooking/baking, and surfing the web/social networks.

## AVERAGE SMART TV OWNERSHIP

72% of research participants have a smart TV, in line with 71% European average.

## NETFLIX TOPS PLATFORM USAGE

The most popular platforms watched regularly are Netflix (55%), Amazon Prime Video (51%), YouTube (44%), ARD/ZDF Mediatheken (44%), Disney+ (24%), Sky (19%), RTL+ (13%) and Joyn (12%).



## BELOW AVERAGE ANNOYANCE FOR ADS ON BVOD PLATFORMS

43% expressed annoyance at ads on BVOD platforms (European average: 50%).

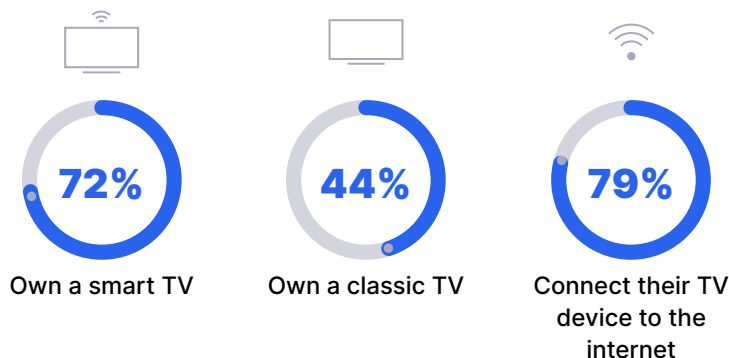
**My TV is always on...  
7 days a week.**

Frank,  
Germany (Midlife)

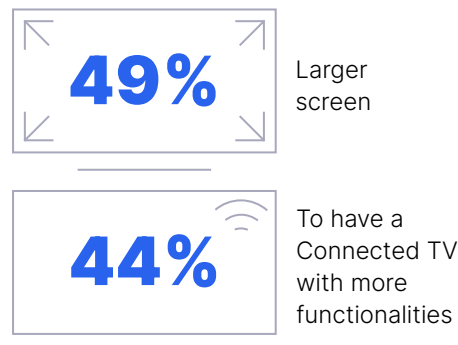


• Compare each statistic with European average, represented by the grey dots.

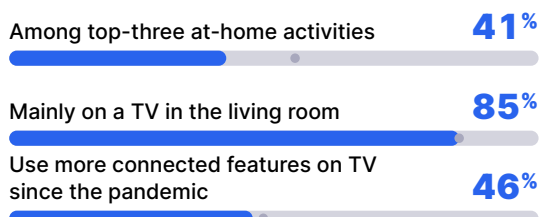
## TECHNICAL SET-UP



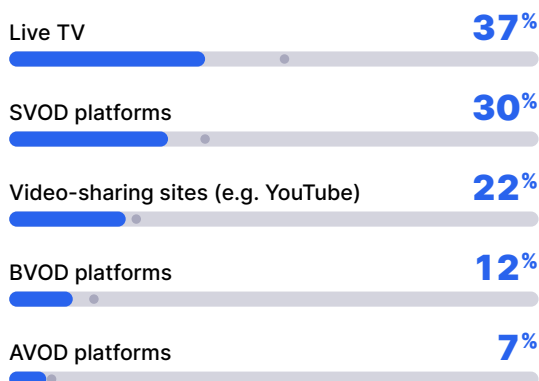
### Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

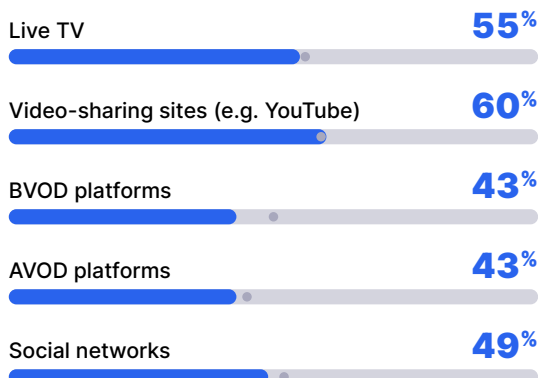


**35%** open to targeted advertising  
(European average: 38%)

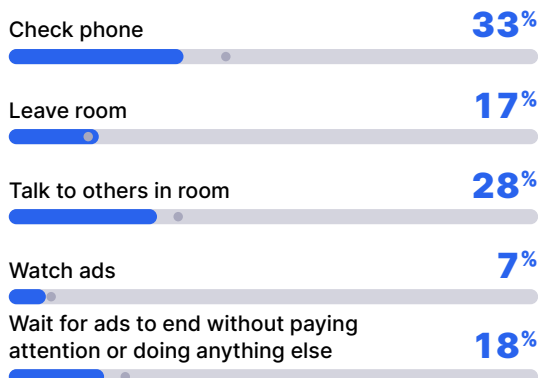
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# ITALY

When asked about their behaviour during ad breaks, 15% of Italian respondents systematically or almost systematically watch the ads – the highest percentage across all countries and almost double the European average of 8%. 40% also watch them from time to time, compared with 36% European average.

## CONNECTED FEATURES DRIVING STRONG SMART TV DEMAND

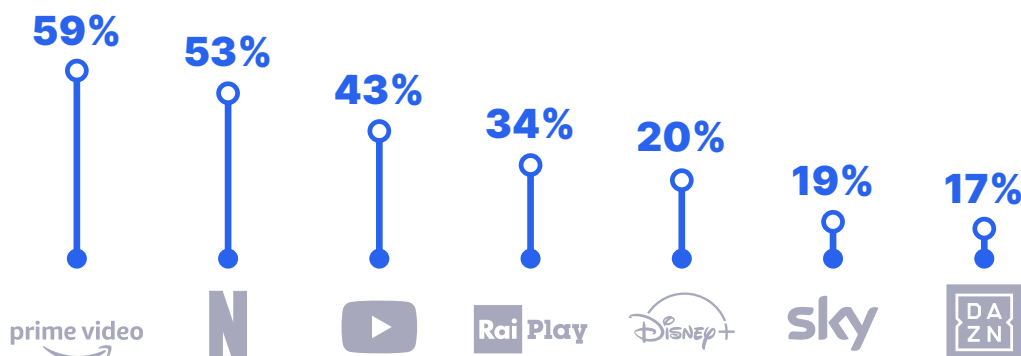
68% have bought a smart TV in the past two years – the highest percentage among all countries (European average: 55%). Of those who had bought a TV in the past year, 49% cited connected features as their strongest purchase motivation.

## WATCHING VIDEO CONTENT SHARES FIRST PLACE WITH SURFING THE WEB/SOCIAL NETWORKS

53% named watching video content as one of their top-three at-home activities (European average: 54%), equal to surfing the web/social networks.

## AMAZON PRIME VIDEO TOPS PLATFORM USAGE

Italy is the only country where Amazon Prime Video beats all other platforms in terms of regular viewing. 59% of Italian respondents regularly used Amazon Prime Video, followed by Netflix (53%), YouTube (43%), RaiPlay (34%), Disney+ (20%), Sky (19%), and DAZN (17%).



## VIEWING EXPERIENCE IS KEY

61% of respondents state that they will do everything to optimise the viewing experience – bigger screen, home cinema, etc. – compared with 43% European average, while smart TV ownership is above average at 76%.

## PANDEMIC HAS CHANGED VIEWING HABITS

77% report that they share more family moments watching TV than they did pre-pandemic (European average: 54%). Further pandemic-induced changes of note include 39% watching more video content (European average: 31%) and 63% using connected features more frequently (European average: 48%).

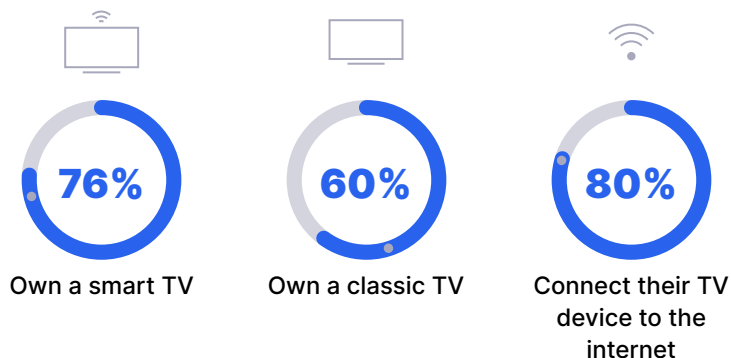
## ABOVE AVERAGE INTEREST IN TARGETED ADS

48% are open to receiving targeted ads (European average: 38%). However, ads on Live TV were particularly annoying – 63% vs 56% European average.

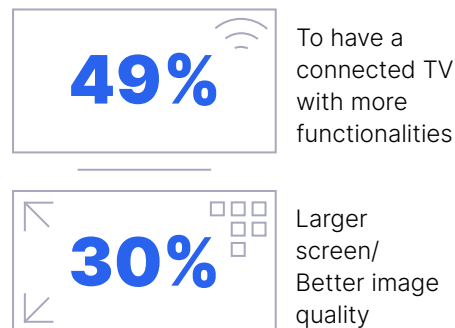


• Compare each statistic with European average, represented by the grey dots.

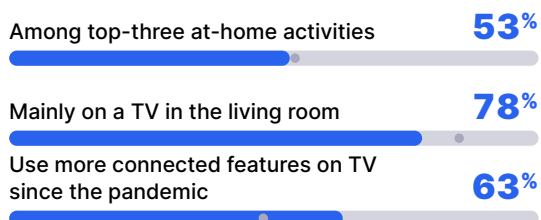
## TECHNICAL SET-UP



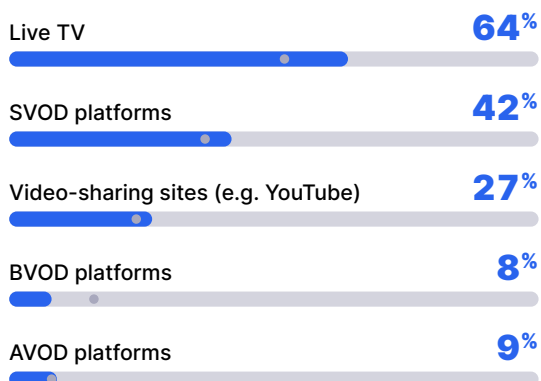
### Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

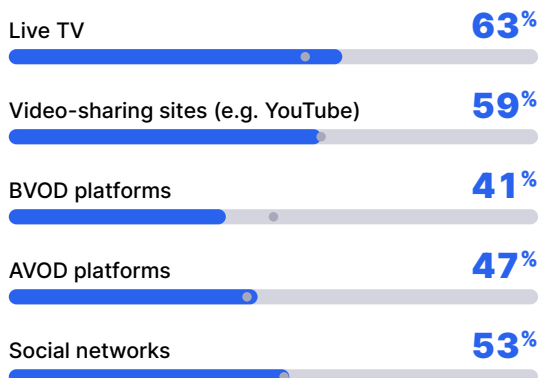


**48%** open to targeted advertising  
(European average: 38%)

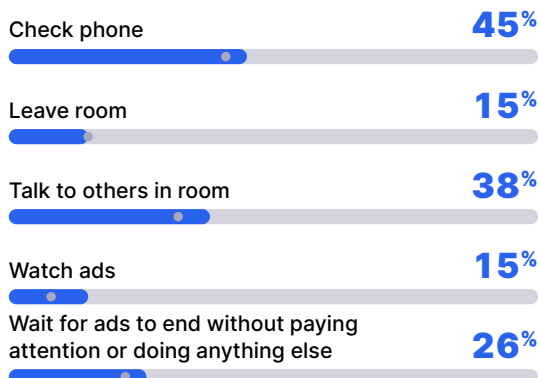
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# THE NETHERLANDS

In the Netherlands, smart TVs, smartphones, and tablets were more popular for regular viewing of video content than in all other countries. The country reported the highest percentages of respondents watching video content every day or almost every day on smart TVs (80%), smartphones (72%), and tablets (41%) (European averages: 75%, 64%, and 35% respectively).

## LEADERS IN CONNECTING TV DEVICES TO THE INTERNET

86% of Dutch participants connect their TV devices to the internet – the highest percentage across all countries – and 77% of Dutch participants have a smart TV (European average: 71%).

## POPULARITY OF WATCHING VIDEO CONTENT ON PAR WITH OTHER COUNTRIES

54% name watching video content as one of their main at-home activities, equal to the European average, with 20% ranking the activity in first place.

## NETFLIX TOPS PLATFORM USAGE BY FAR

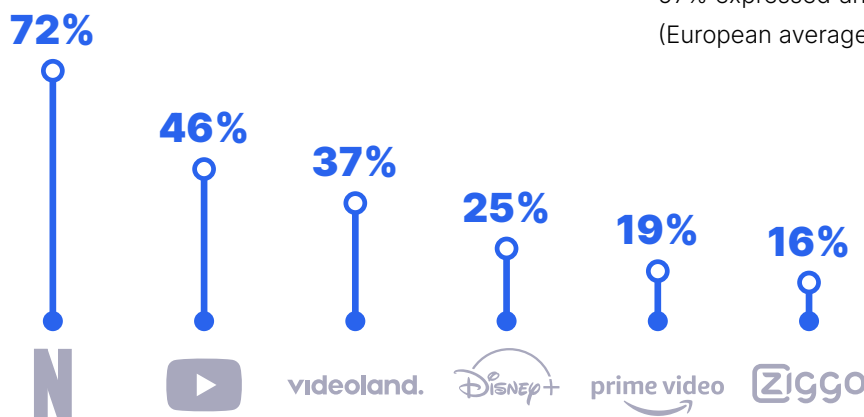
The most popular platforms watched regularly are Netflix (72%), YouTube (46%), Videoland (37%), Disney+ (25%), Amazon Prime Video (19%), and Ziggo (16%).

## ABOVE AVERAGE FOR FAMILY VIEWING

In the Family focus group, 92% enjoy watching video content with family and friends, compared with the European average of 75%.

## ABOVE AVERAGE ANNOYANCE FOR ADS ON BVOD PLATFORMS

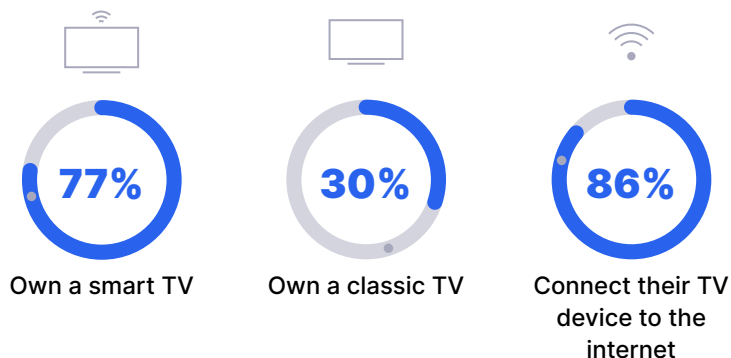
57% expressed annoyance at ads on BVOD platforms (European average: 50%).



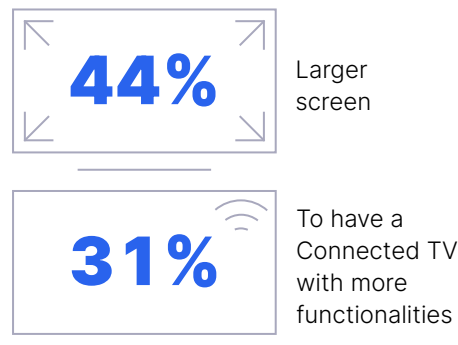


• Compare each statistic with European average, represented by the grey dots.

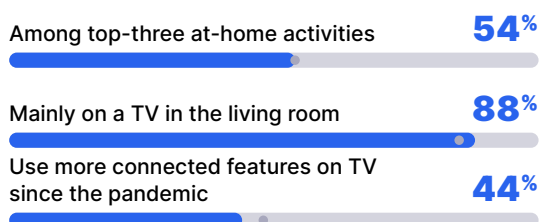
## TECHNICAL SET-UP



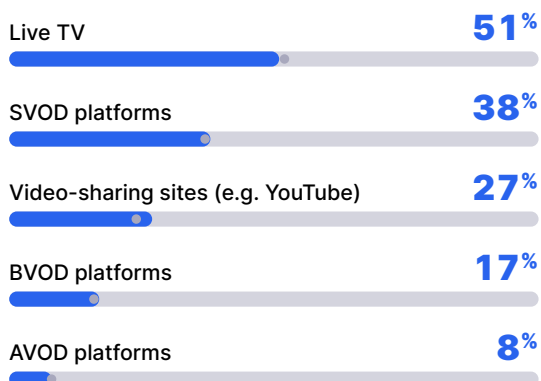
### Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

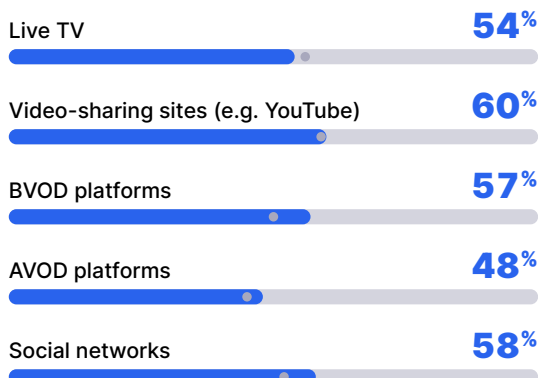


**35%** open to targeted advertising  
(European average: 38%)

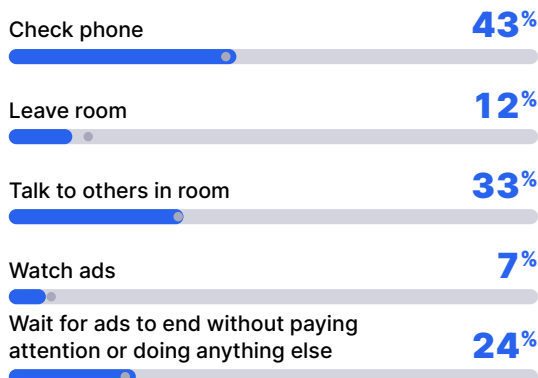
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# NORWAY

Watching video content is a popular at-home pastime in Norway, with 23% of Norwegians naming it as their number one activity in the home – the second highest percentage across all studied countries.

## WATCHING VIDEO CONTENT A TOP-THREE PASTIME FOR MOST RESPONDENTS

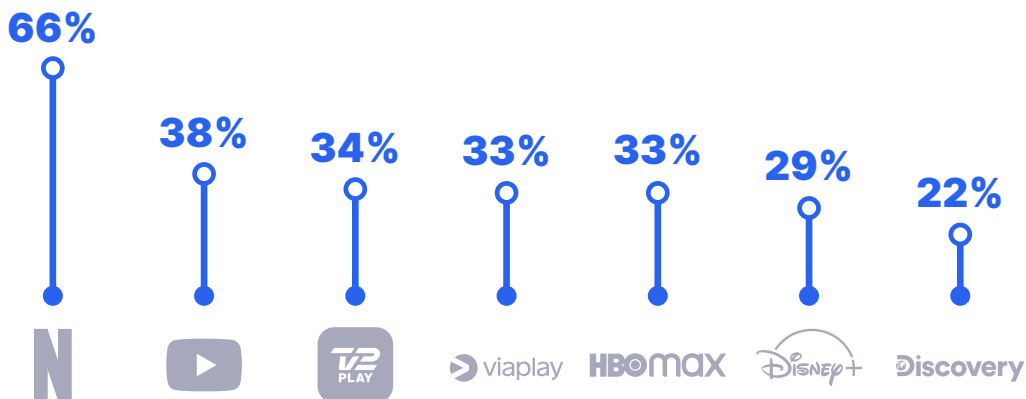
As well as sitting at the top spot for 23% of respondents, watching video content was in the top-three at-home activities for 61% of Norwegians surveyed – the highest percentage across all countries – followed by 54% who enjoyed surfing the internet/social media.

## NETFLIX TOPS PLATFORM USAGE

The most popular platforms watched regularly are Netflix (66%), YouTube (38%), TV2Play (34%), Viaplay (33%), HBO Max (33%), Disney+ (29%), and Discovery (22%).

## STRONG AFFINITY WITH EUROPE AS A WHOLE

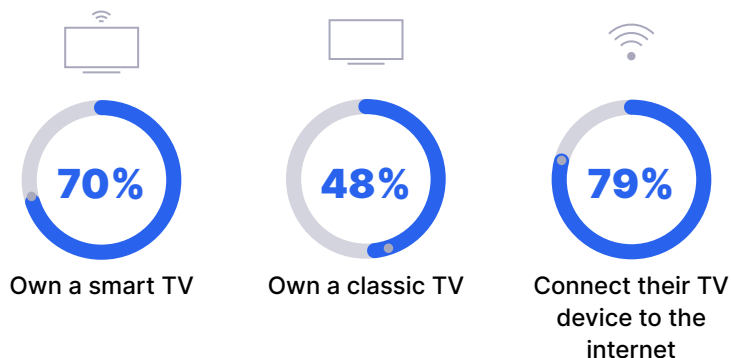
Norway is highly representative of Europe in general, with many Norwegian results very similar to the European averages.



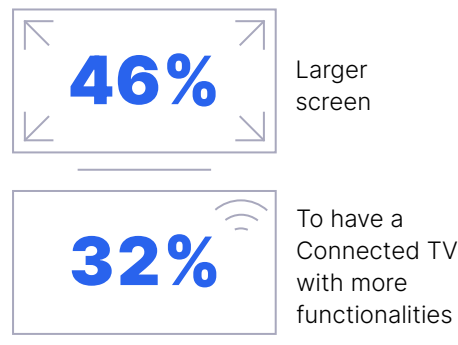


• Compare each statistic with European average, represented by the grey dots.

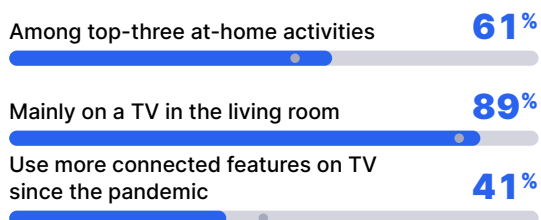
## TECHNICAL SET-UP



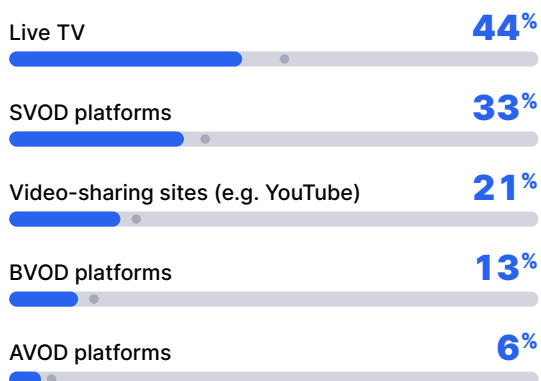
### Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

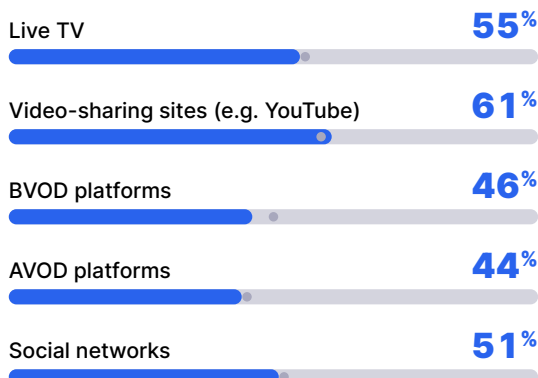


**35%** open to targeted advertising  
(European average: 38%)

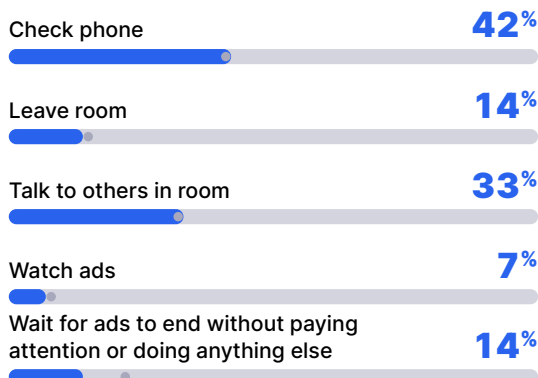
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# SPAIN

Watching TV content brings families and friends together in Spain. When asked about their habits while watching TV, Spain had the largest proportion of participants (37%) choosing 'strongly agree' for the statement 'I enjoy this moment with my family and friends' – higher than all other countries (European average: 28%).

## ACCESS TO CONNECTED FEATURES DRIVING STRONG TAKE-UP OF SMART TVs

Spain had the highest percentage across all countries of smart TV owners at 78% (European average: 71%), and 50% – again the highest percentage across all countries – of participants who recently purchased a new TV device cited connected features as their main motivation (European average: 38%).

## KEY AT-HOME ACTIVITY

19% name watching video content as their main at-home activity, ahead of surfing websites/social media (16%) and cooking/baking (16%). 57% include it in their top three.

## ABOVE AVERAGE VIEWING DURING LUNCH, AFTERNOONS, AND DINNER

When compared with the European averages, high percentages of Spanish participants are using their TV devices on weekdays at lunchtimes (21% vs 9%), in the afternoons (24% vs 10%), and during dinner (39% vs 27%). The picture is similar on the weekends – lunchtime is 18% (vs 9%), afternoon is 32% (vs 16%), and during dinner is 32% (vs 22%).

## PANDEMIC HAS CHANGED VIEWING HABITS

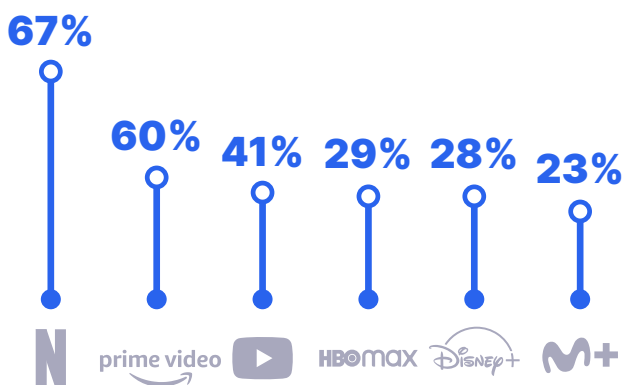
65% report that they share more family moments watching TV than they did pre-pandemic (European average: 54%). Further pandemic-induced changes of note include 42% watching more video content (European average: 31%), and 64% using connected features more frequently (European average: 48%).

## NETFLIX TOPS PLATFORM USAGE

The most popular platforms watched regularly are Netflix (67%), Amazon Prime Video (60%), YouTube (41%), HBO Max (29%), Disney+ (28%), and Movistar+ (23%).

## ABOVE AVERAGE ANNOYANCE FOR ADS IN ALL VIEWING CATEGORIES

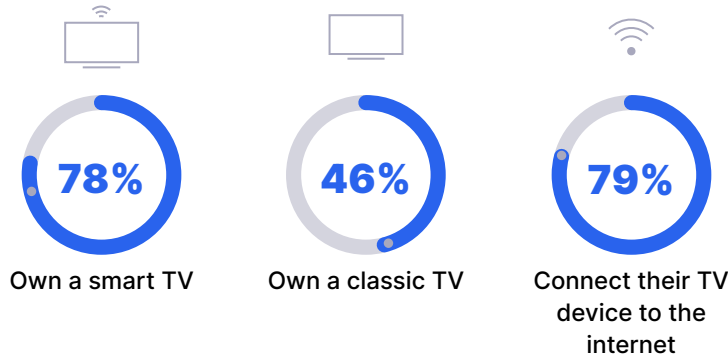
Participants in Spain were more critical of ads overall, with above average percentages of respondents rating ads 4 or 5 on a scale of annoyance in all viewing categories.



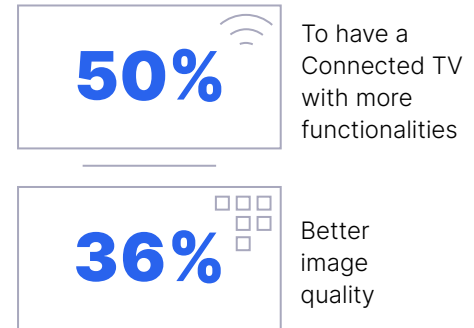


• Compare each statistic with European average, represented by the grey dots.

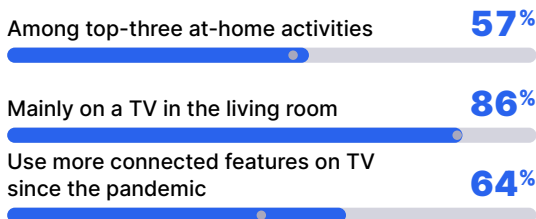
## TECHNICAL SET-UP



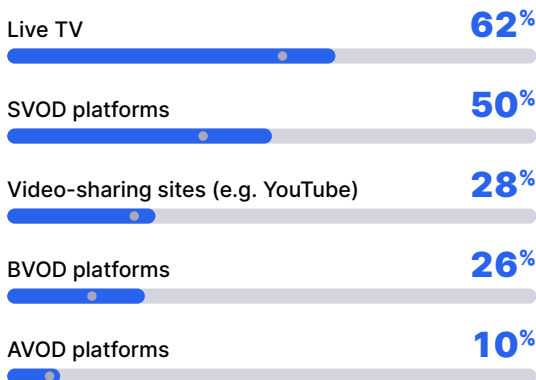
### Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

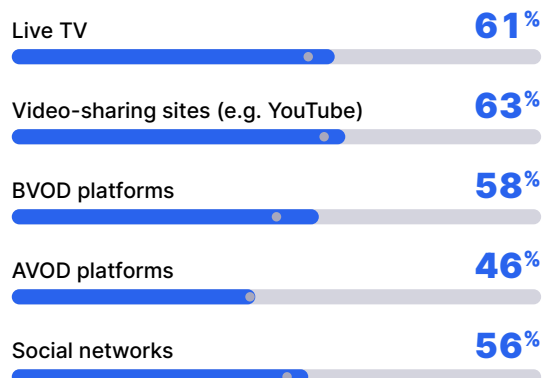


**43%** open to targeted advertising  
(European average: 38%)

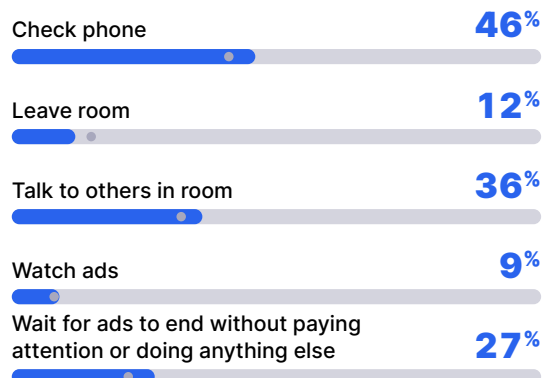
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# SWEDEN

Watching video content is a popular at-home activity in Sweden – 22% cite it as their number one at-home activity, one of the highest percentages across Europe, while 60% included it in their top three, higher than the European average of 54%.

## ABOVE AVERAGE FOR BUYING/RENTING ON VOD PLATFORMS

55% of Swedish respondents reported that they buy or rent content from VOD services, higher than the European average of 44%.

## NETFLIX TOPS PLATFORM USAGE

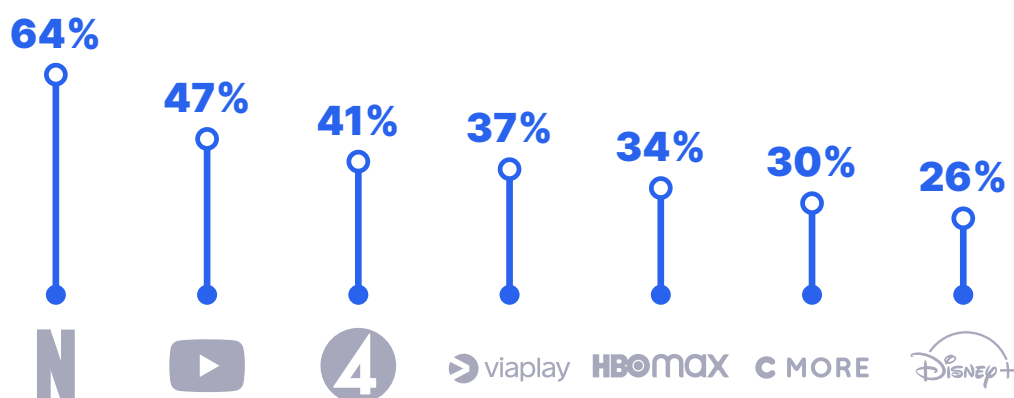
The most popular platforms watched regularly are Netflix (64%), YouTube (47%), TV4 Play (41%), Viaplay (37%), HBO Max (34%), C More (30%), and Disney+ (26%).

## BELOW AVERAGE ANNOYANCE FOR ADS ON BVOD AND AVOD PLATFORMS

43% expressed annoyance at ads on BVOD platforms (European average: 50%), and 39% expressed annoyance at ads on AVOD platforms (European average: 45%).

## STRONG AFFINITY WITH EUROPE AS A WHOLE

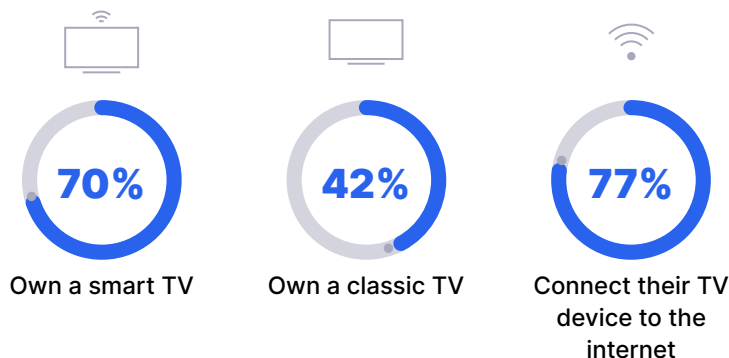
Similar to Norway, Sweden is highly representative of Europe in general, with Swedish responses resulting in data close to most European averages.



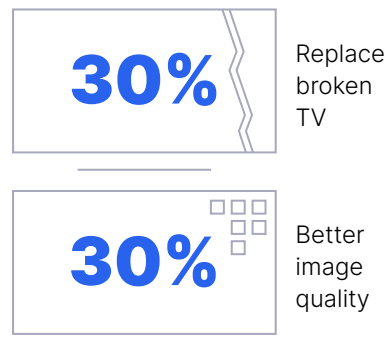


• Compare each statistic with European average, represented by the grey dots.

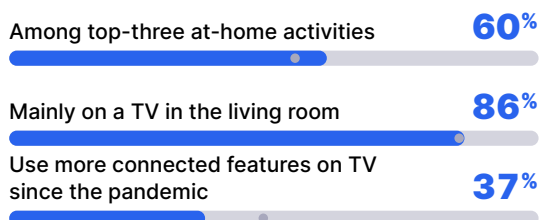
## TECHNICAL SET-UP



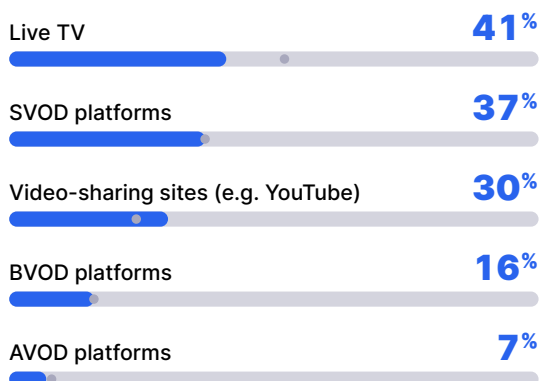
### Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

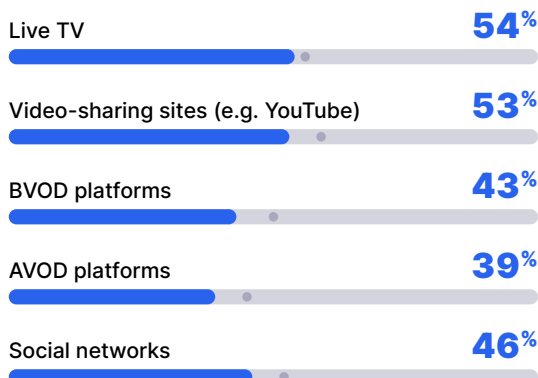


**36%** open to targeted advertising  
(European average: 38%)

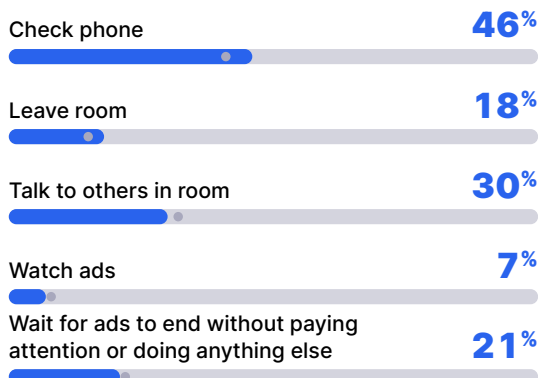
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# UNITED KINGDOM

Watching video content is a popular at-home activity in the UK, with 26% naming it as their number one activity (European average: 20%), significantly higher than joint second-place activities of surfing websites/social media (15%) and taking care of the house (15%). 58% include it in their top three.

## SECOND HIGHEST IN CONNECTING TV DEVICES TO THE INTERNET

At 83%, the UK is second only to the Netherlands in the percentage of respondents connecting their TV devices to the internet. This trend is led by the Family and Young focus groups, at 87% and 86% respectively, while the Midlife focus group lags behind, with 79% connecting their TVs to the internet.

## NETFLIX TOPS PLATFORM USAGE AND BVOD PLATFORMS ARE ALSO POPULAR

The most popular platforms watched regularly are Netflix (63%), BBC iPlayer (51%), Amazon Prime Video (43%), YouTube (40%), ITV Hub (36%), Disney+ (32%), and Sky (30%).

## BELOW AVERAGE ANNOYANCE FOR ADS

The percentage of UK respondents expressing annoyance at ads was below the European average

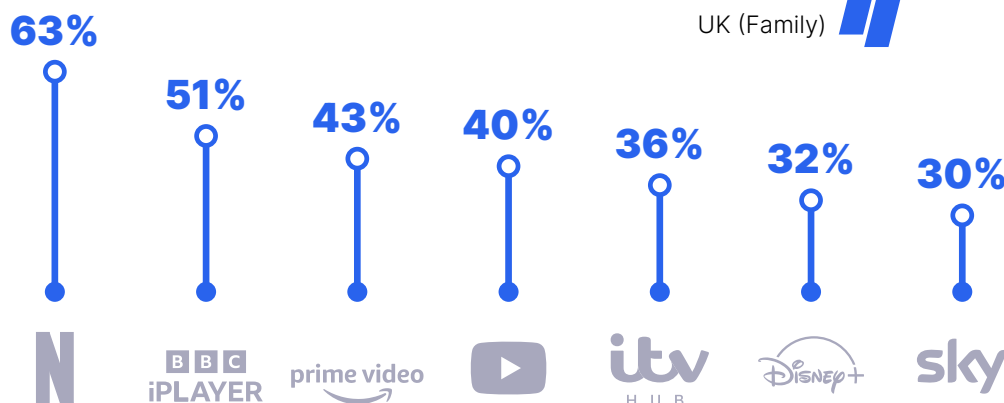
across all platforms, including 46% expressing annoyance at ads on Live TV (European average: 56%), and 39% expressing annoyance at ads on AVOD platforms (European average: 45%).

## ABOVE AVERAGE INTEREST IN TARGETED ADS

42% of UK respondents are open to receiving targeted ads (European average: 38%). This was one of the highest percentages across all ten countries – only Italy (48%) and Spain (43%) reported higher percentages.

**I think without TV our life would be very boring, wouldn't it? It's a way of life for people in the UK.**

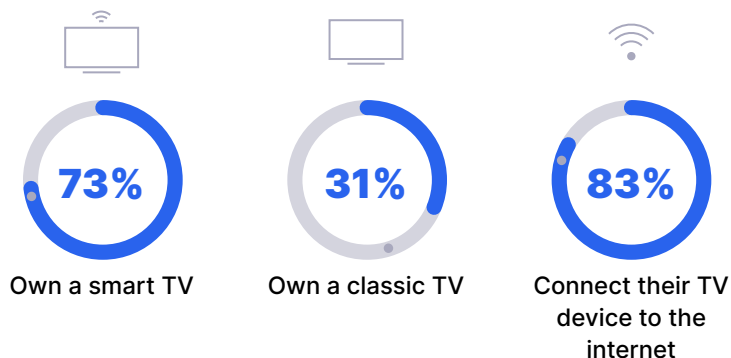
Rhian,  
UK (Family)



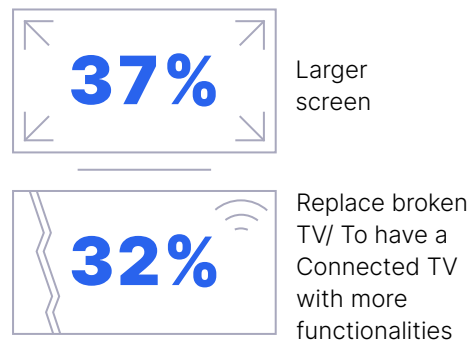


• Compare each statistic with European average, represented by the grey dots.

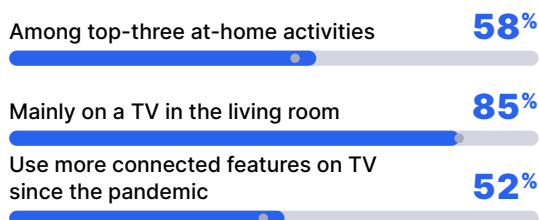
## TECHNICAL SET-UP



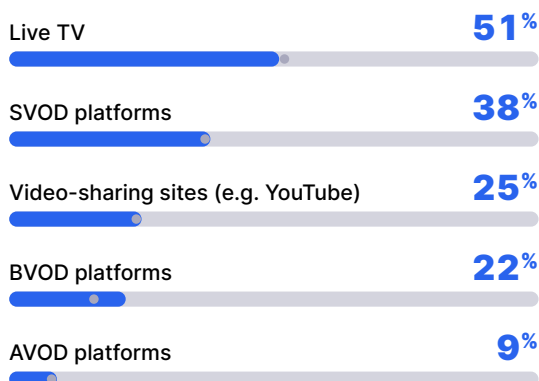
## Main motivation for buying a smart TV



## CONSUMPTION OF VIDEO CONTENT



### Watch every day or almost every day

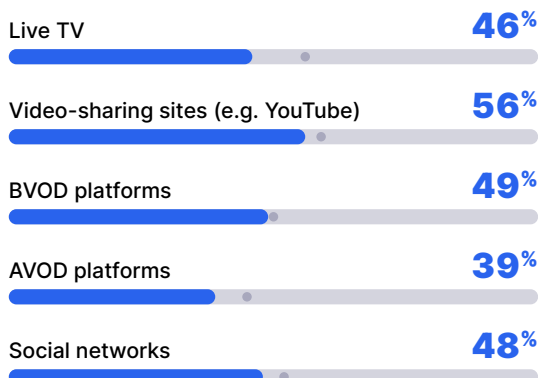


**42%** open to targeted advertising  
(European average: 38%)

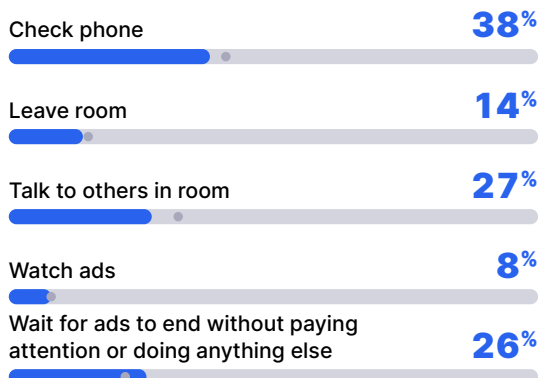
## PERCEPTION OF ADVERTISING



### Annoyed by ads (highest rating of 4 or 5 on 0-5 scale)



### Habits during ad breaks



# CONCLUSION

The device usage patterns, viewing habits, and attitudes to advertising revealed during this research have important implications for everyone in the advertising delivery chain. As we address these implications below, it is clear there are numerous strategies that can be employed to overcome any challenges presented, with the industry already responding with new technologies and collaborations.

## **A FRAGMENTED AUDIENCE**

Connected/smart TV audiences are fragmented across multiple platforms. The increased choice for users as well as the increasingly numerous touchpoints means that maintaining the scalability television brought to brands – making them famous across the nation – presents more of a challenge. In response to different viewing preferences, various solutions have emerged to help advertisers streamline their media strategy efforts and reach audiences across this fragmented landscape. Major VOD platforms have started to provide integrated offerings that include BVOD, SVOD, and AVOD services. Examples include RTL+ in Germany, ITVX in the UK, and Videoland in the Netherlands. Additionally, tech platforms are not only providing premium inventory on one supply-side platform, they are also developing holistic solutions that enable advertisers to access all via one buying platform.

## **LEVERAGING DATA AND TECHNOLOGY CAN REDUCE ANNOYANCE**

The research shows that irrespective of the viewing platform, advertisements are often perceived as disruptive. While a large number of participants remain in front of the TV screen during ad breaks, many are not paying attention to the advertisements. Many viewers check their smartphone, talk to other people in the room, or disengage completely. However, while

research participants did indicate that they found advertisements annoying, they did express a desire to be served more personalised, targeted advertisements that speak to their interests and deliver relevant product recommendations.

Therefore, advertisers and publishers need to explore technology solutions that minimise annoyance by maximising relevance. TV's shift to digital presents opportunities for brands to move beyond the one-to-many approach of traditional TV advertising and harness the power of a one-to-one targeted approach. Precise targeting for ad delivery (such as Addressable TV advertising and contextual targeting), non-intrusive ad formats (such as L-banners, mastheads, and pre-roll in-stream ads), and cross-device frequency capping and ad sequencing solutions can prevent ad fatigue and enable storytelling capabilities that capture attention and spark interest. Furthermore, cross-device targeting technologies are able to connect with users on other devices when attention on the TV screen is lost.

## **ULTRA-PERSONALISED UNIVERSES**

Thanks to the multiplication of screens, video content consumption is becoming ever-more fragmented, and as every member of the household owns at least one personal device, video content consumption also has the potential to become very individualised. Combined with new adtech solutions such as Addressable TV advertising, this opens up an opportunity for advertisers to build ultra-personalised universes for their target customers. Video content can be delivered to an individual on relevant platforms and devices at optimal times, and advertisers can ensure continuity in messaging and storytelling across numerous screens.

Whether brands are advertising in print, online, or within video content, delivering effective media campaigns is not a simple process. As consumers' attention is pulled in multiple directions, the need to optimise campaigns so that ads reach the right audiences at the right time and in the right place is greater than ever. Digital video advertising in particular is a complex process of buying, selling, targeting, and delivery that requires collaboration, transparency, and expertise at every stage, especially as technology advances and the needs and behaviours of viewers diversifies. But with industry alliances simplifying the process and with expert research providing the guidance needed to adjust and develop tactics to align with these changes, we're confident that, as we enter the New Life of the Living Room, video advertising will continue to be central to many brands' media strategies, delivering high engagement in households across Europe. /

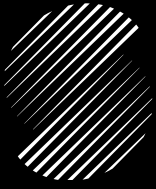


# RTL/AdConnect

RTL AdConnect is the international Total Video sales house of RTL Group and beyond. It provides international advertisers with a simplified access to a global premium and brand-safe total video inventory ensuring that the right media decisions are made for pan-European campaigns. Thanks to its media partners from RTL Group and beyond, RTL AdConnect reaches around 165 million potential consumers in Europe every day. RTL AdConnect offers exclusive solutions around high quality content across an extensive portfolio of media partners consisting of more than 150 TV channels, 300 digital platforms and 40 radio stations in 12 countries. With 360-degree solutions, RTL AdConnect supports brands on every step of the way, offering full support from start to finish, ensuring high reach, deep market insights and cross-screen solutions.

**For more information, please visit  
[www.rtladconnect.com](http://www.rtladconnect.com)  
and follow us on**





# smartclip

At smartclip, we are shaping the future of video advertising – delivering advanced online video and TV advertising solutions. Our proprietary technology and services empower brands with true cross-screen storytelling on all devices, and enable broadcasters and publishers to monetise their content in the most efficient and effective way possible. We are committed to delivering the most innovative video ad experiences – spanning in-stream, out-stream, Connected TV, Addressable TV, and gaming. As a subsidiary of RTL Deutschland, smartclip is part of RTL Group – Europe’s leading free-to-air broadcaster group. Headquartered in Hamburg, smartclip has offices in Berlin, Munich, Düsseldorf, Gütersloh, Stockholm, Oslo, Helsinki, Amsterdam, Milan, and Rome.

**For more information, please visit**

**[www.smartclip.tv](http://www.smartclip.tv)**

**and follow us on**



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