



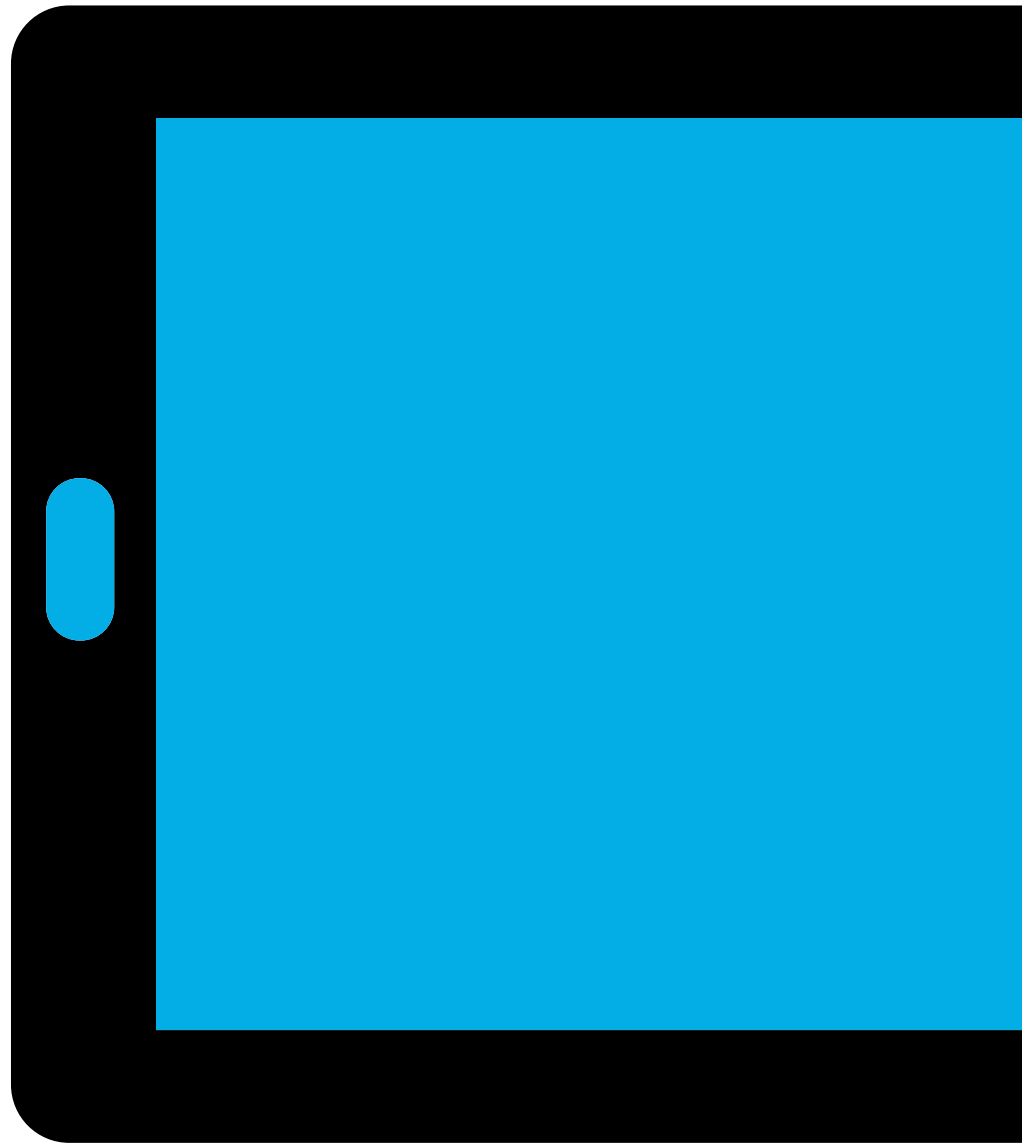
The New Life of the Living Room

Study report 2023

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



Contents



Introduction

The study

Methodology

An overview of European households

Device usage and viewing behaviours per focus group

Young
Family
High income

Device usage and viewing behaviours per country

Denmark
Finland
France
Germany
Italy
The Netherlands
Norway
Spain
Sweden
United Kingdom

Conclusion

About RTL AdAlliance

About smartclip

About Ad Alliance Netherlands

Authors, contributors and contacts



Introduction

As the way we watch TV – and the technology that enables this – continues to evolve at pace, today's viewers have more choice and control over what they watch and how they watch it than ever before. The TV set in the living room is no longer the only viewing device option in the household, with smartphones, tablets, and PCs/laptops a fixture in most homes. Viewers have many platforms to choose from and an ever-increasing array of content to browse through on those platforms. And they can either watch content for free or at a reduced cost in exchange for watching ads, or pay more for uninterrupted, ad-free content.

This vast range of choices can create challenges for anyone looking to reach these viewers and grab their attention through advertising. However, it also creates opportunities. With such extensive access and flexibility in terms of what people can watch, as well as when and how they can watch it, consuming video content has become an integral, everyday activity in most people's lives. This gives brands myriad opportunities to reach their potential customers with impactful, engaging ads. In addition, despite the many viewing devices now available, the TV screen is, more than ever, the favourite destination for watching video content. And connected TVs (CTVs) and smart TVs – the focal point of many living rooms – are enabling powerful, tech-driven solutions that bring a new level of relevance to the ads delivered to those screens.

For any business operating in this complex ecosystem, a deep understanding of how viewer preferences and the viewing experience are evolving is essential to maximising success, particularly when it comes to CTV advertising. And furthering this understanding is the objective that underpins the *New Life of the Living Room* initiative. The first edition of the report, published in 2022 and based on exclusive research carried out by Consumer Science & Analytics, offered key insights into media consumption habits and usage behaviours in European households. Now, to explore how viewing preferences and the viewing experience have changed twelve months on, RTL AdAlliance, smartclip, and Ad Alliance Netherlands have partnered on a second research project, the results of which are presented in this brand-new, updated report.

This fresh round of research returns to the key questions on device usage and ownership, viewing habits, and attitudes towards advertising. It also delves into new topics such as what genres viewers are watching across different platforms and the role of the TV set in the home. In response to the rising cost of living, which is being experienced by households across Europe, topical questions about the impact of inflation on subscription budgets and the interest in cheaper, ad-supported content offerings are also explored.





The findings are presented from a pan-European perspective and from the perspective of three key target groups as well as each of the ten countries surveyed, providing a unique, updated snapshot of the *New Life of the Living Room* in 2023. The report also concludes by translating the research outcomes into recommendations on how to plan CTV advertising to effectively reach today's viewers.

Equipping advertisers, agencies, publishers, media sales executives, adtech professionals, distributors, manufacturers, and platform operators with all the insight they need and more, the *New Life of the Living Room* is an essential tool for anyone looking to engage viewers in living rooms across Europe. ✕

”

This fresh round of research returns to the key questions and also delves into new topics.



The **study**



Methodology

Quantitative research

Quantitative research was carried out in February 2023 via online questionnaires completed in ten European countries (Denmark, Finland, France, Germany, Italy, the Netherlands, Norway, Spain, Sweden, UK). More than 8,500 people (aged 18-64) participated, answering 26 questions to provide extensive quantitative data.

There were 700-1,000 participants per country (based on the population of the country), and the participants were selected using the quota sampling method based on age, gender, region, and employment status.

The research was carried out by CSA (Consumer Science & Analytics).

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. Voluntary and informed consent was obtained from all people surveyed.

Target groups



Young
(aged 18-34)



Family
(people with children under 18)



High income
(people who have declared a high yearly gross household income)¹

10

European countries

8,532
participants

**700
to 1,000**

participants per country

(approximately 1,000 respondents per country in France, Germany, Italy, Spain, and United Kingdom; approximately 700 respondents per country in Denmark, Finland, The Netherlands, Norway, and Sweden)

26

questions

¹ Household's yearly gross income (before tax)
Denmark: >450k kr, Finland: >60k€, France: CSP+ (Catégories socio-professionnelles supérieures), Germany: >60k€, Italy: >44k€, The Netherlands: >48k€, Norway: >900K kr, Spain: >44k€, Sweden: >700k kr, United Kingdom: >£45k

An overview of European households

From viewing behaviours and device ownership to reactions to advertisements and the impact of inflation on household budgets for video content subscriptions, this section takes a closer look at how the viewing experience is evolving in European living rooms.



Watching video content is still the most popular at-home activity in many European households.



How is watching TV faring as an at-home activity?

The latest survey shows that watching video content is still the most popular at-home activity in many European households, and its popularity increased in 2023. Up three percentage points on last year, 57% of respondents include watching video content among their top three at-home activities, which is, once again, the highest percentage across all activities. Other popular at-home activities include surfing websites/using social media (48%), taking care of the house (44%), and cooking/baking (44%).

The only country where watching video content does not take the top spot among the most-mentioned at-home activities is Germany. Here, taking care of the house takes top spot, as it did in 2022, but watching video content has climbed into the top three, sharing second place with cooking and baking, compared with taking fourth place last year. In Italy, watching video content has also edged ahead of surfing websites/using social media, after sharing the top spot in 2022.

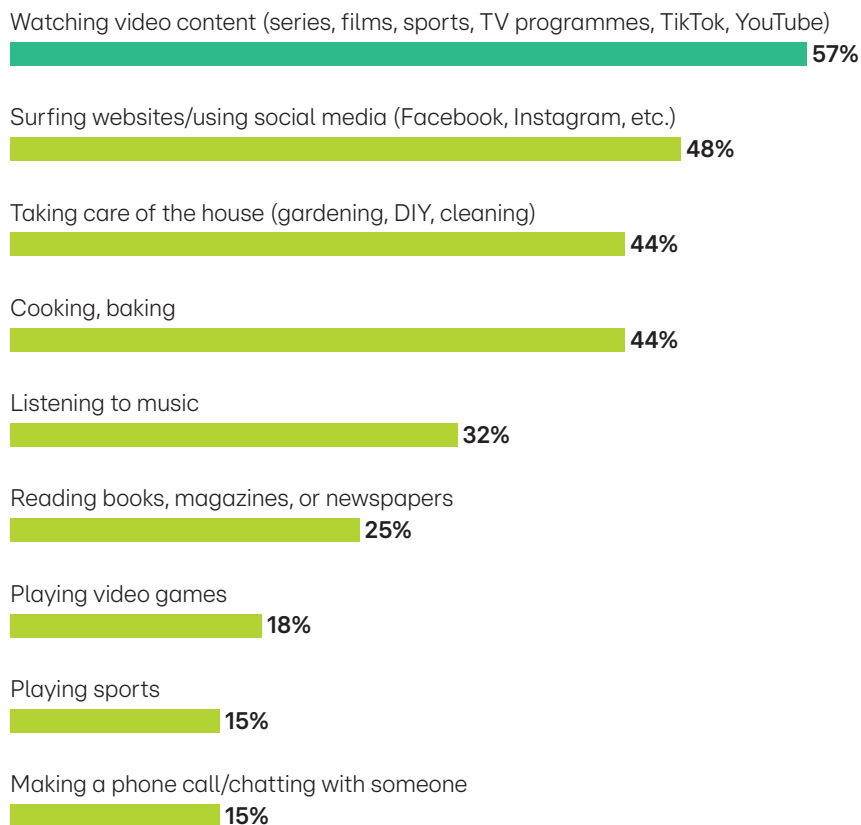
One year on

Popularity of watching video content increases across Europe

57%

rank watching video content among their top three at-home activities in 2023 – an increase of three percentage points on 2022.

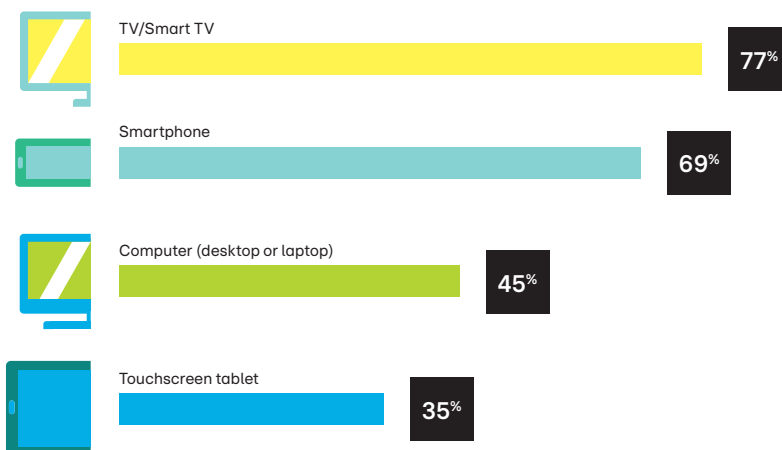
Among the following activities, what are the three main activities you do the most at home?



What devices are European viewers using?

When watching video content, the TV screen maintains its dominance as the device used, with 77% watching video content on the 'big screen' every day or almost every day. Nevertheless, other devices, especially smartphones, which come in at a close second at 69% for regular viewing, continue to be common in everyday usage. In the Young target group (aged 18-34), smartphones take priority with 74% using them for regular viewing, above the TV at 71%.

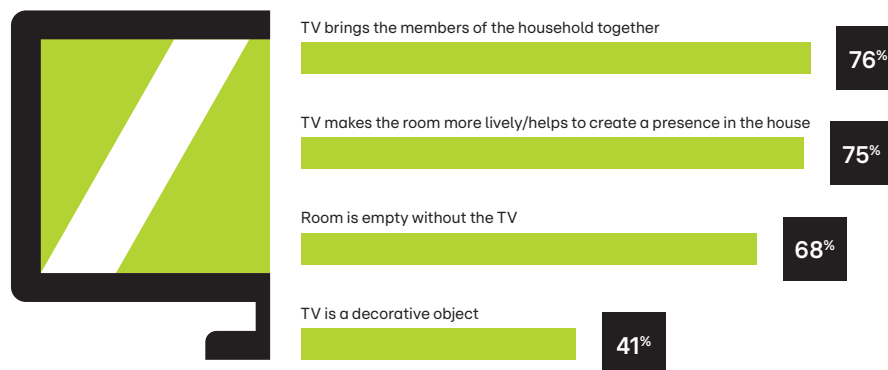
Use this device to watch video content every day or almost every day



In most households, the TV screen is much more than just a device to watch content on. It plays a central role both in our family lives, with 76% stating that it brings the members of the household together, and in our living rooms, with 75% stating that it makes the room more lively or helps to create a presence within the house. Many (68%) said that the room would feel empty without the TV set, and 41% even class it as a decorative object.

The importance of the TV screen in our living rooms is highlighted further by our continued investment in new smart TV devices. More than half (54%) of respondents report buying a new smart TV within the last two years. And this figure has remained stable compared with 2022 – when 55% reported buying a smart TV within the past two years – proving that the motivation to purchase a new TV was not linked to the pandemic. The research also shows the huge importance of the TV device among the Young target group (aged 18-34), with 63% buying a new smart TV within the last two years, compared with 58% of the Family group and 53% of the High Income group.

Role of the TV set in the house

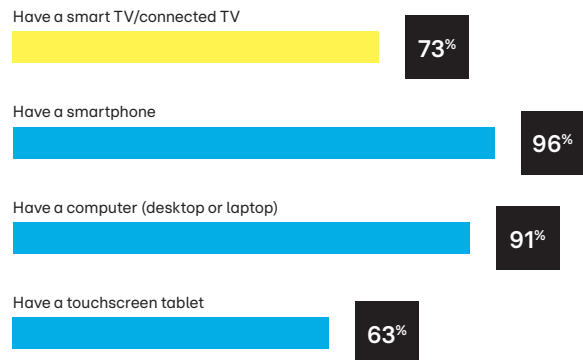
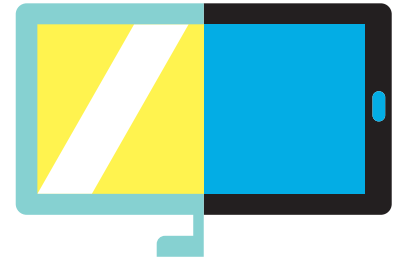


One year on

Smart TV purchases **remain stable**.

In 2023, **54%** report buying a smart TV in the past two years, compared with 55% in 2022, indicating that the motivation to purchase was not linked to the pandemic.

Smart TVs are still the standard device owned across Europe, with a total of 73% of respondents owning a smart TV – up two percentage points on last year – and ownership of classic TVs dropping to 41% (from 45% in 2022). Smart TV ownership is highest in the Netherlands (81%), Italy (80%), and Spain (80%) and lowest in Finland (66%) and France (56%). In France, however, the only country where classic TVs were more popular in 2022, smart TV ownership is increasing, and is now only 1% behind ownership of classic TVs – 44% of respondents in France had bought a smart TV in the last two years, compared with only 20% buying a classic TV. In addition to the ‘big screen’, European households are still home to multiple other viewing devices – 96% of respondents have smartphones in their household, 91% have computers (desktop or laptop), and 63% have touchscreen tablets.



What are European viewers watching?

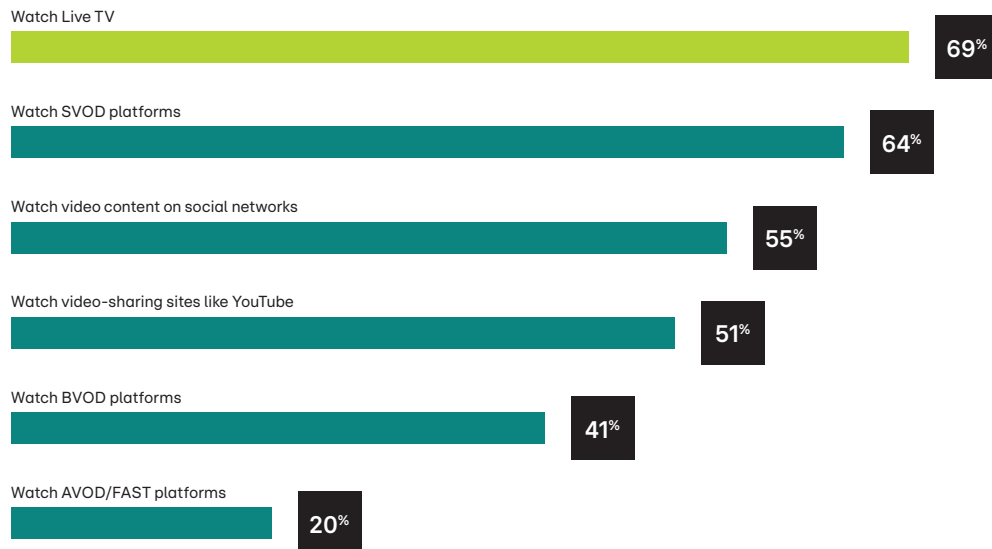
Audiences in Europe choose from a wide range of viewing destinations when it comes to what they watch on their TV screens. For regular viewing (which is defined as those who responded ‘every day or almost every day’ or ‘one to three times a week’), Live TV is predominant in most countries, with an overall European average of 69% regularly watching Live TV channels on their TVs, higher than any other platform or channel type. The dominance of Live TV in Europe as a whole slightly decreased year-on-year, dropping three percentage points on 2022 figures. This decrease for Live TV has benefited Broadcaster-based Video-on-Demand (BVOD) platforms – platforms that allow viewers to watch live content or catch-up content on any device, such as 6play in France, ITVX in the UK, or RTL+ in Germany – which rise four percentage points to 41%. Video-sharing sites such as YouTube also benefited, rising three percentage points to 51%, but SVOD platforms remain stable at 64%.

One year on

Live TV viewership **decreased slightly**.

In 2023, **69% report watching Live TV ‘every day or almost every day’** or ‘one to three times a week’, three percentage points down on 2022. This benefited BVOD platforms and video-sharing sites such as YouTube, which increased slightly, but not SVOD platforms, which remained stable.

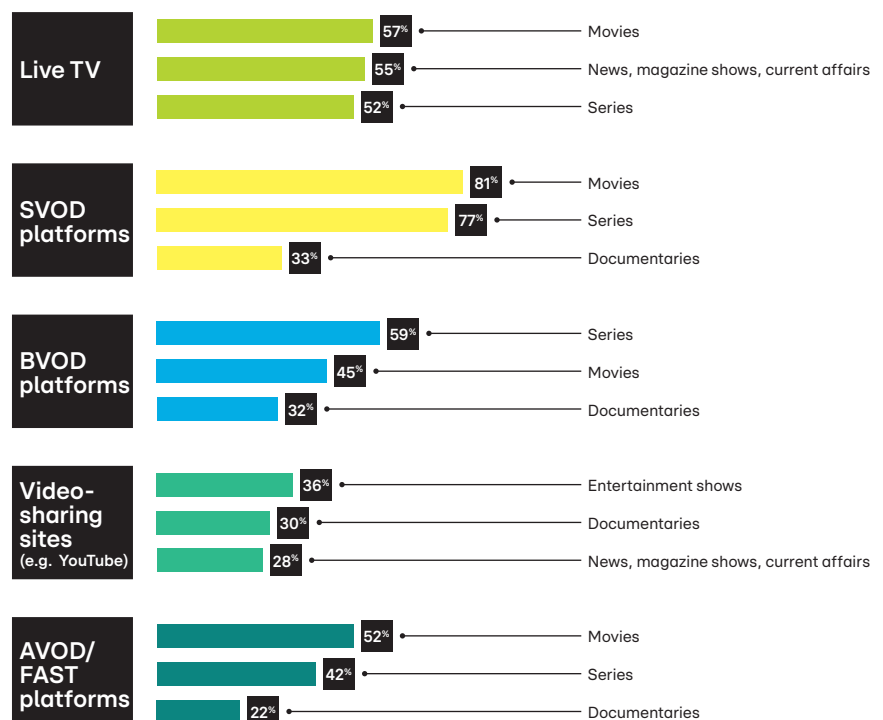
What do viewers regularly watch on their TV screens ('every day or almost every day' or 'one to three times a week')?



This year's research took a closer look at what genres of content Europeans usually watch across the different platforms/channel types available. The broadest genre spread is seen with Live TV, on which viewers watch movies (57%); news, magazine shows, current affairs (55%); series (52%); documentaries (42%); sport (41%), entertainment shows (39%), and animation and youth programmes (14%). SVOD platforms, BVOD platforms, and Advertising-based Video-on-Demand (AVOD) platforms (also known as free VOD or FAST – Free Ad-Supported TV – platforms) are mainly used to watch series and movies, while the top viewing genres for video-sharing sites such as YouTube are entertainment shows and documentaries.

Overall, the huge amount of video content available does leave 55% of respondents feeling lost and not knowing what to choose, and 75% would like an offer that gives them access to all their content, paid and free, from the same interface/platform.

Top 3 genres ranked by platform



How do European viewers react to advertisements?

Respondents were asked about their attitude to ads when watching video content on each platform. Each respondent ranked their answers from 0 (ads were not annoying) to 5 (ads were very annoying). The results showed that European viewers find ads annoying on all platforms, with scores averaging between 3 and 3.5 across the platforms. However, the percentage of European viewers giving ads a high annoyance score of 4 or 5 has decreased since last year on Live TV channels (50% in 2023 vs 56% in 2022), video-sharing sites such as YouTube (54% in 2023 vs 59% in 2022), and AVOD/FAST platforms (42% in 2023 vs 45% in 2022). SVOD platforms were not an option for this question in 2022, but in 2023, 52% of respondents ranked ads as either 4 or 5 for annoyance. Ads on video-sharing sites such as YouTube are ranked the most annoying in 2023, with an average score of 3.5, while ads on AVOD/FAST platforms are reported to be the least annoying, with an average score of 3.

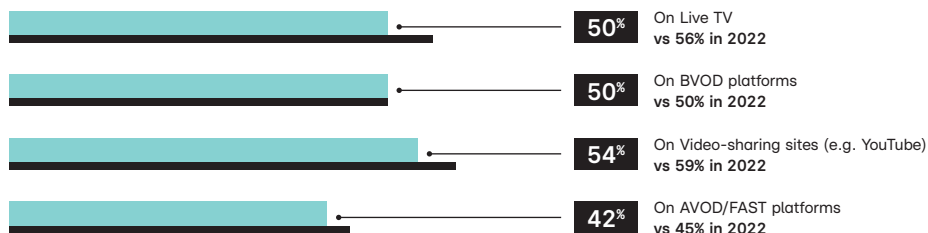
Regardless of the device used, 35% report they watch the ads 'from time to time', and 9% report they watch them 'systematically or almost systematically'. Many do not give their full attention to ads. When asked what they regularly do (defined as 'systematically or almost systematically' and 'from time to time') during ad breaks, 82% 'double screen' by checking their phone, 80% talk to other people in the room, and 73% look for the 'skip' button or for other content recommendations/suggestions on the screen. However, only 15% 'systematically or almost systematically' leave the room during ad breaks, and 50% leave the room 'from time to time'. As people are staying in the room, it means that 'passive attention' is paid to the ads, even if it is not 'active attention', with eyes on the screen. This passive attention is very valuable for advertisers as it means attention-grabbing ads have the potential to attract viewers back to watching the screen.

One year on

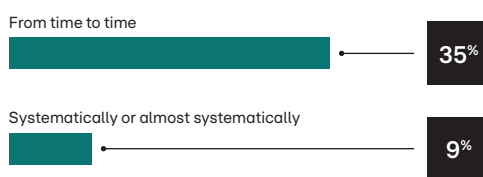
Ads less annoying on many platforms.

When compared with 2022 results, the percentages of respondents reporting the highest annoyance scores (4 or 5) for ads decreased across all platforms in 2023 (except BVOD platforms, which stayed the same).

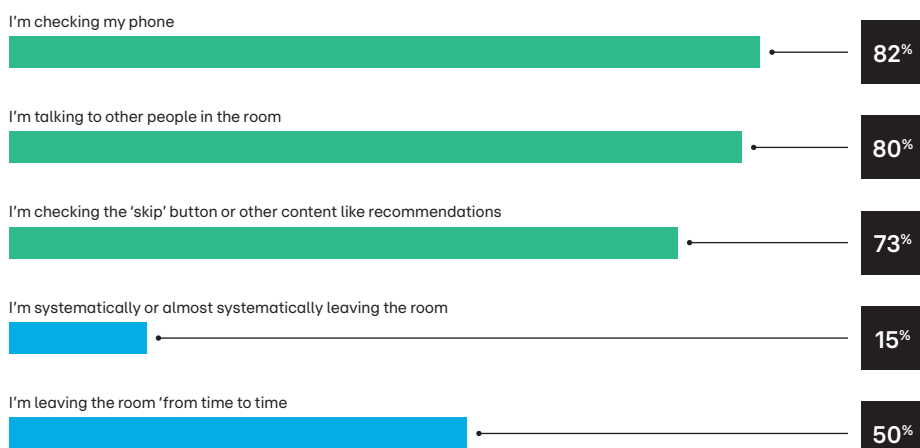
Ads annoyance



Do you watch the ads?



What do you do during ad breaks?



When asked about targeted ads, an average of 37% of Europeans surveyed would be interested in receiving targeted ads matching their interests – the highest interest was in Italy (49%) and the lowest was in France (30%). A higher proportion (47%) of the Young (aged 18–34) target group expressed interest in targeted ads, compared with 45% of the Family group and 35% of the High Income group. This indicates the potential to improve viewers' advertising experience by using tech-driven solutions such as Addressable TV advertising, which serves relevant ads to relevant viewers based on a variety of granular targeting criteria. Of those not interested in receiving targeted ads, many raised issues around their personal data, with 46% concerned

about companies tracking and selling their user data and 39% not willing to share information about themselves. However, 55% just do not like ads, even if they are about their hobbies.

Respondents have a mixed opinion on ads, however, if it involves paying for subscriptions. Although 58% would 'prefer to pay to see programmes without being cut off by commercials', a similar number (56%) stated that 'advertising during a programme does not bother me if it allows me to have access to premium shows for free or at a lower cost'. And 52% agree with both statements!

37%

would be interested in receiving targeted advertising that suits their interests.

58%

would prefer to pay to see shows without being cut off by commercials

vs **56%**

state that advertising during a show does not bother them if it allows them access to premium shows for free or at a lower cost.

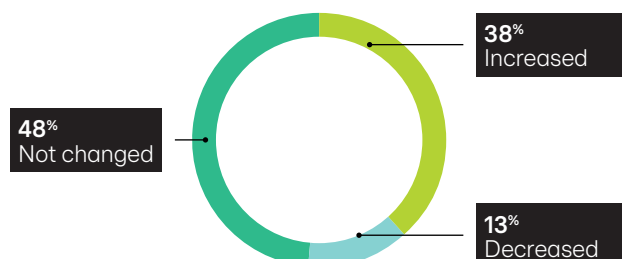
Is inflation impacting household spend on video content?

With high inflation prevalent across Europe and households experiencing significant rises in the cost of living, this year's research looked at how the household budget for video content subscriptions is faring in the current climate. The proliferation of subscription-only platforms continues, and consumers can often choose from a variety of offers and pricing tiers, so how much are households spending to access their favourite shows or the latest content, and how much do they expect to spend in the future?

Despite increasing demands on household budgets from rising energy and food

prices, most households are not ready to sacrifice their viewing enjoyment, with 60% continuing to have a dedicated budget for video content subscriptions (pay TV offers, streaming services, and VOD). Only 21% of respondents report that their household does not have any video content subscriptions; the remaining 19% do not know. Fluctuations across the countries are also small, with the lowest percentage of households paying for video content subscriptions in France (53%) and the highest percentage in the Netherlands (68%). When all currencies are converted to euros¹, the average monthly expenditure across all countries is €42, with the highest in the UK at €57² and the lowest in Finland at €32.

Since the overall rise in prices, would you say that your household spend on video content (pay TV offers, streaming services, and VOD) has...



Many respondents (38%) across Europe are spending more on video content since the overall rise of prices, while the budget has remained the same in 48% of households, and only 13% said their household spend has decreased. This increase was highest in the Netherlands, where 53% of respondents are spending more, and lowest in Germany, where only 27% are spending more.

¹ Using the exchange rates on <https://markets.ft.com/> as of May 11, 2023
² UK monthly average (Feb 2023): £49.9; Converted to euros on <https://markets.ft.com/> as of May 11, 2023

When looking to the future, 63% predicted that their household budget for video content would not change in the next six months and only 18% predicted a decrease.

However, among those who would be looking for ways to decrease their expenditure on video content in the next six months, they would rather do that by dropping one or more subscriptions (48%) than by changing to a cheaper subscription or an offer with ads (28%).

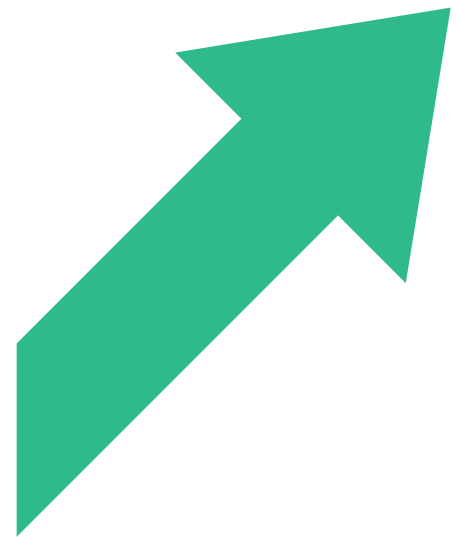
Over the next six months, do you think your household budget for video content will...



Despite the proliferation of platforms, Netflix continues to dominate when it comes to regular viewing, with 60% of European households regularly watching Netflix on their TV screens.

Its closest competitors are YouTube (41%), Amazon Prime Video (35%), and Disney+ (29%). The level of awareness about Netflix's cheaper ad-supported subscription tier – which the platform began to roll out at the end of 2022 – is also quite high. In the markets where the 'Basic with Ads' plan has already launched (UK, France, Germany, Italy, Spain), 56% are aware of it. In the markets where it has not yet launched (Netherlands, Denmark, Finland, Norway, Sweden), 36% are aware of it.

The research also indicated that Europeans are still undecided about Netflix's 'Basic with Ads' plan. In the markets where it is already available, only 14% stated that they would 'definitely' be interested in subscribing to it and 30% stated that they would 'definitely not' be interested. However, the majority are not sure – 27% are 'probably' interested and 30% are 'probably not' interested. This indecision was mirrored in the countries where it is not yet available – 15% are 'definitely' interested and 24% are 'definitely not' interested, while 31% are 'probably' interested and 30% are 'probably not' interested. ✕



Device usage and viewing behaviours per target group



The 2023 research highlighted a number of differences among the three target groups when looking at device usage/technical set-up, media consumption, attitudes to advertising, expenditure on video content, and more. In this section, summary data and key findings on each target group are outlined, providing essential insight for any brand looking to reach these target groups with video advertising campaigns.

Target groups



Young
(aged 18-34)



High income
(people who have declared a high yearly gross household income)¹



Family
(people with children under 18)

¹ Household's yearly gross income (before tax)
Denmark: >450k kr, Finland: >60k€, France: CSP+ (Catégories socio-professionnelles supérieures), Germany: >60k€, Italy: >44k€, The Netherlands: >48k€, Norway: >900K kr, Spain: >44k€, Sweden: >700k kr, United Kingdom: >£45k



Young

(aged 18-34)



When it comes to regular viewing at home, among the Young target group, 74% watch content on smartphones 'every day or almost every day', compared with 71% watching content on the TV device. This contrasts with the overall results, where TVs take priority over smartphones.

TV device is an important part of home life

The TV device plays a key role in the home among the Young group – 82% state that it brings members of the household together, 80% state that it makes the room more lively and creates a sense of presence in the house, 74% think that the room feels empty without the TV, and 50% see the TV as a decorative object. These are all higher percentages than the European average.

Technical set-up

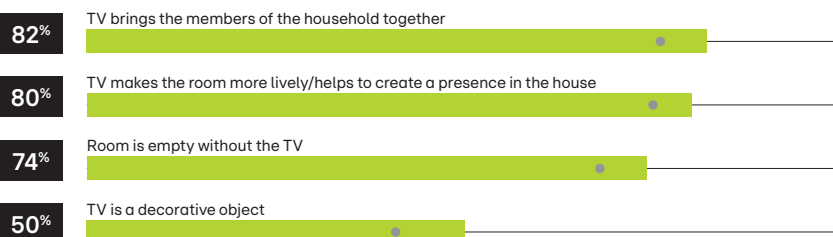
Owns Smart TV



Purchased Smart TV in last two years



Role of the TV set in the house



Young

(aged 18-34)



Watching video content is a favourite at-home pastime

60% include watching video content in their top-three at-home activities, higher than the European average of 57%. The next most popular at-home activity among the Young target group is surfing the web/using social media, which 48% include among their top-three at-home activities.

SVOD and video-sharing sites take priority over live TV

Compared with overall results, where Live TV is the most popular choice for regular viewing ('every day or almost every day' or 'one to three times a week'), the Young group ranks Live TV (59%) below SVOD platforms (75%) and video-sharing sites such as YouTube (62%). These are also the platforms they often watch with other people – 80% report co-viewing on SVOD platforms and 56% report co-viewing on video-sharing sites, higher than the European average.

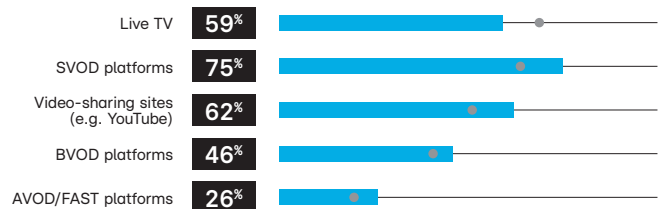
Movies are the favourite genre on live TV

When respondents in the Young group do watch Live TV, movies are their favourite choice, with 47% watching movies, followed by 44% watching series and 42% watching news, magazine shows, and current affairs.

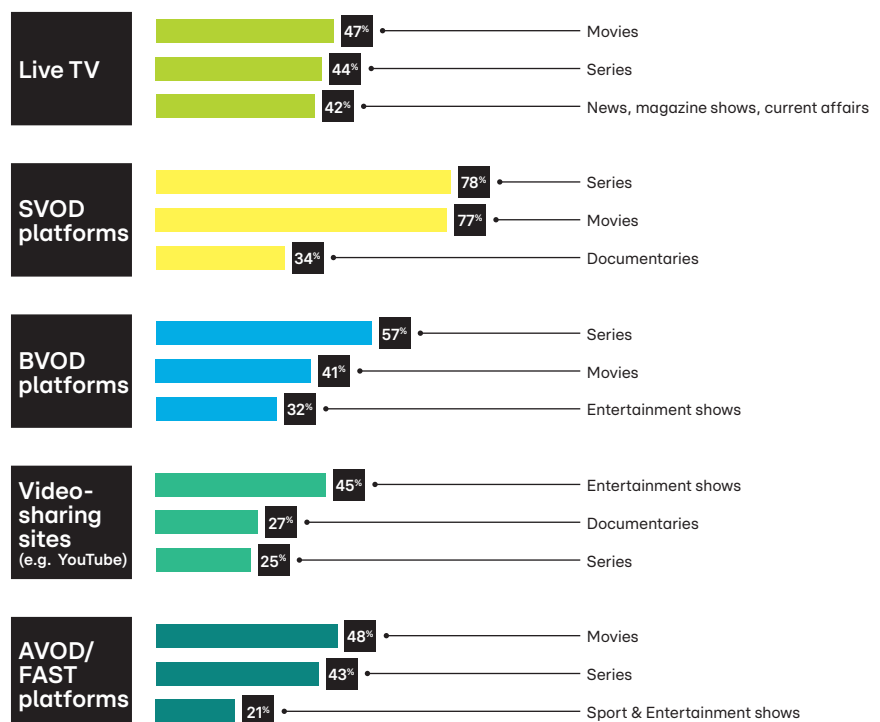
Consumption of video content



Watches 'every day or almost every day' or '1 to 3 times a week'



Top 3 genres watched



Young

(aged 18-34)



Expenditure on video content increases

Respondents in the Young target group are open to increasing their expenditure on video content subscriptions. 44% state that their budget has increased since the overall rise in prices (European average: 38%), and 26% expect their budget to increase in the next six months (European average: 19%).

High interest in targeted ads

The Young group shows above-average interest in receiving targeted ads – 47% of respondents in the Young group are definitely or probably interested in ads that are more relevant to them (European average: 37%).

High awareness of new Netflix offer

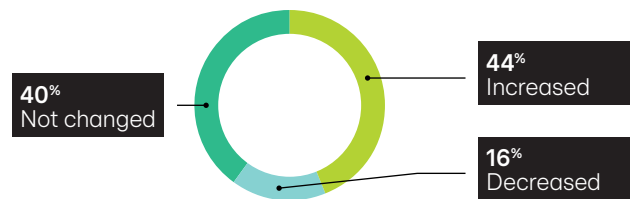
In the countries where Netflix's 'Basic with Ads' plan is available, a higher percentage of respondents in the Young group are aware of it than the average percentage across those countries. 65% are aware of it (average: 56%), and 50% are interested in subscribing to it (average: 40%).

Household spend on video content subscriptions

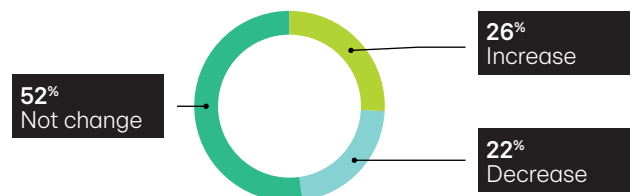
€44

Average monthly spend on video content subscriptions

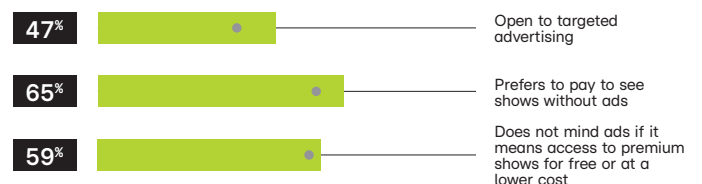
Household spend has...



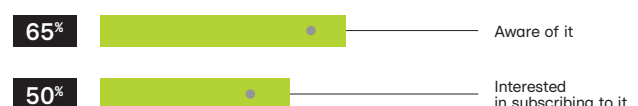
In the next six months, expects household spend to...



Perception of advertising



Awareness of new Netflix offer



Family

(people with children under 18)



81% of the Family group state that TV brings members of the household together (European average: 76%), highlighting the importance of co-viewing with children among this group. When it comes to which platforms they watch with other people, SVOD and Live TV are the most popular for co-viewing – 80% report watching SVOD platforms with other people (European average: 69%) and 75% watch Live TV with other people (European average: 71%).

Above-average ownership of Smart TVs

81% of the Family group own a smart TV (European average: 73%). 79% report watching video content on their smart TV 'every day or almost every day' (European average: 77%).

Technical set-up

Owens Smart TV



Purchased Smart TV in last two years



Role of the TV set in the house



81%

TV brings the members of the household together

75%

TV makes the room more lively/helps to create a presence in the house

69%

Room is empty without the TV

45%

TV is a decorative object

Family

(people with children under 18)



Watching video content main at-home activity

In the Family group, watching video content is the most-mentioned among the main at-home activities, with 52% including it among their top three.

At-home activities differ from average

Aside from watching video content, the Family group ranks other at-home activities differently to the European average. In the Family group, only 44% include surfing websites/using social media in their top-three at-home activities. This puts it in fourth place behind taking care of the house, which 50% include in their top three, and cooking/baking, which 49% include in their top three.

This contrasts with the overall Europe results, where surfing websites/using social media takes second place.

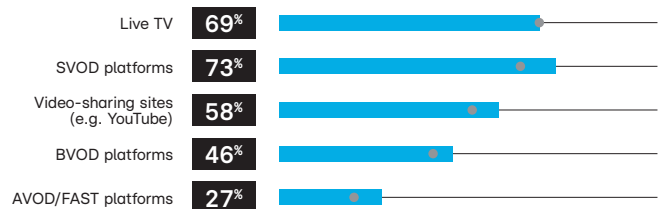
Wide range of platforms used

The Family group makes use of all types of viewing platforms. Higher than average percentages report regularly ('every day or almost every day' or 'one to three times a week') watching SVOD (73%), BVOD (46%), video-sharing sites such as YouTube (58%), and AVOD (27%), and Live TV watching is identical to the European average at 69%.

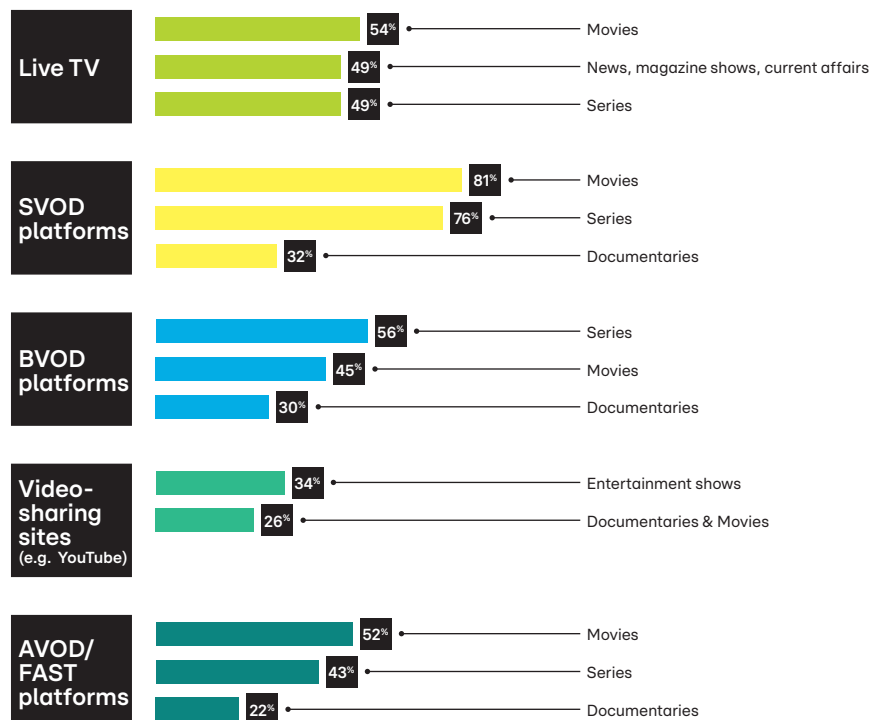
Consumption of video content



Watches 'every day or almost every day' or '1 to 3 times a week'



Top 3 genres watched



Family

(people with children under 18)



High percentage pay for subscriptions

70% of the respondents in the Family group pay for video content subscriptions, higher than the European average of 60%.

Above-average interest in targeted ads

Respondents among the Family group are quite open to receiving targeted ads that better suit their interests. 45% would be interested, higher than the European average of 37%.

Above-average subscription intent in certain countries

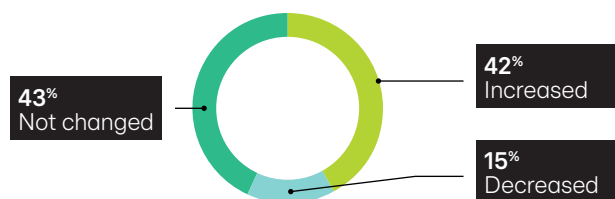
In the countries where the new Netflix 'Basic with Ads' plan is not yet available, the percentage of respondents in the Family group who are interested in subscribing to it is higher than the average. 52% intend to subscribe, compared with the 47% average across these countries.

Household spend on video content subscriptions

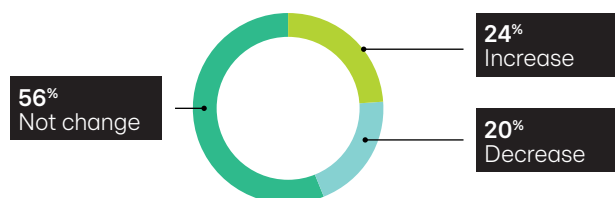
€47

Average monthly spend on video content subscriptions

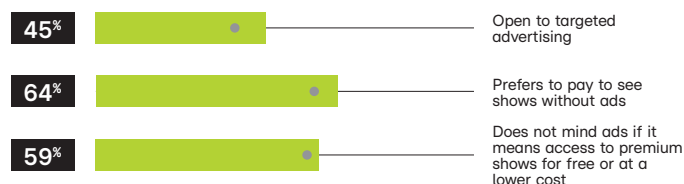
Household spend has...



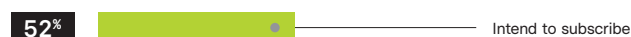
In the next six months, expects household spend to...



Perception of advertising



Awareness of new Netflix offer



High income

(people who have declared a high yearly gross household income¹)



Among the High-Income group, Live TV is the most popular choice for regular viewing. 73% watch Live TV 'every day or almost every day' or 'one to three times a week', more than the European average of 69%. SVOD platforms are also popular among the High-Income group at 71% (European average: 64%)

Above-average ownership of smart TVs

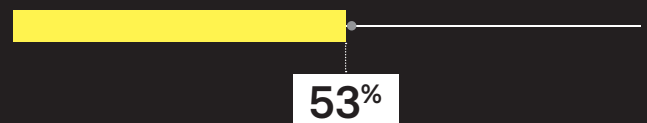
81% of respondents in the High-Income group own a smart TV (European average: 73%), and 82% watch video content on their smart TV 'every day or almost every day' (European average: 77%).

Technical set-up

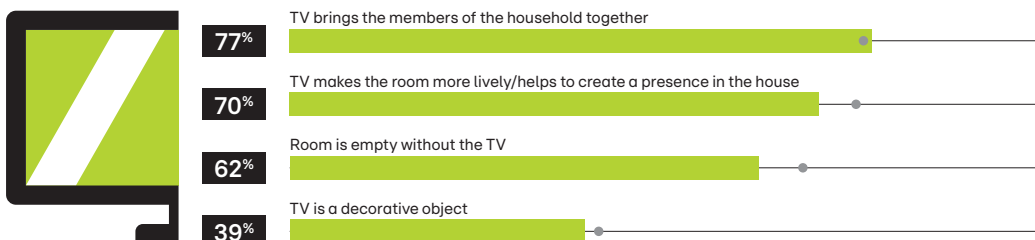
Owens Smart TV



Purchased Smart TV in last two years



Role of the TV set in the house



¹ Household's yearly gross income (before tax) - Denmark: >450k kr, Finland: >60k€, France: CSP+ (Catégories socio-professionnelles supérieures), Germany: >60k€, Italy: >44k€, The Netherlands: >48k€, Norway: >900k kr, Spain: >44k€, Sweden: >700k kr, UK: >£45k*

High income

(people who have declared a high yearly gross household income)



Watching video content is a key at-home activity

Watching video content is a popular at-home activity among the High-Income group. 59% include it among their top-three at-home activities – a higher percentage than all other activities and higher than the European average of 57%.

Highest percentage watch video content more on TV device

61% of respondents in the High-Income group report watching content more on the TV device than on any other device, higher than the European average of 55%.

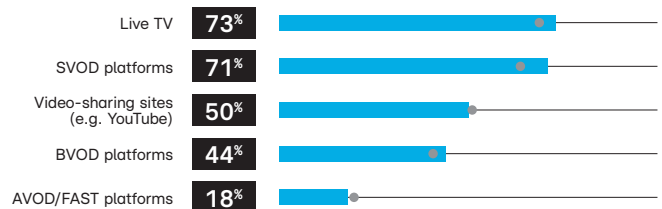
Live TV important for co-viewing and keeping up with the news

When looking at platforms watched with other people, Live TV is the most popular, with 78% reporting that they co-view Live TV, followed by 76% co-viewing on SVOD platforms. Live TV is also an important destination for staying updated on the latest news, with 61% – the highest percentage among all genres – of the High-Income group watching news, magazine shows or current affairs on Live TV.

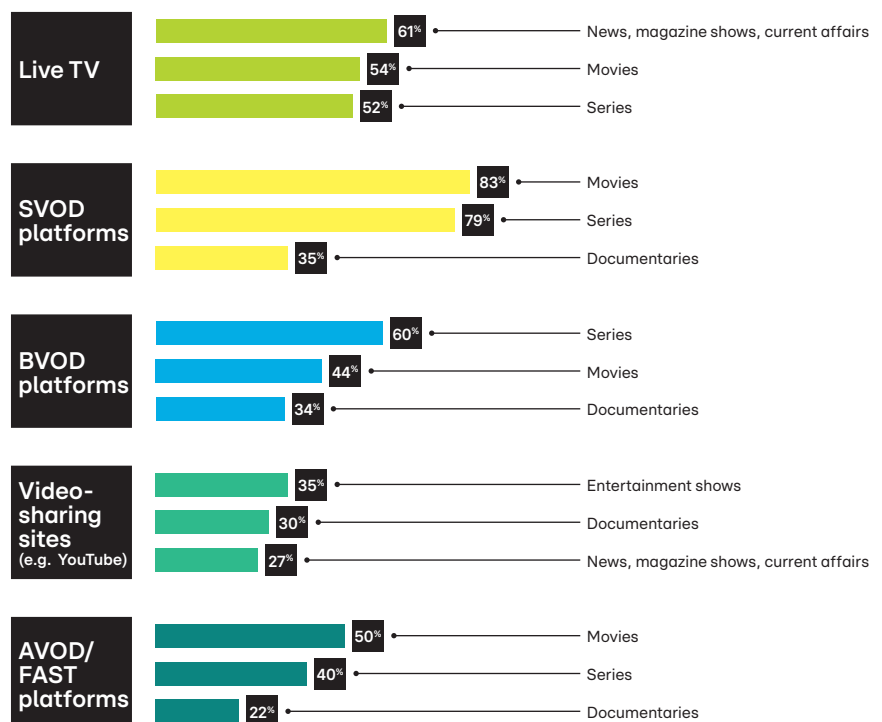
Consumption of video content



Watches 'every day or almost every day' or '1 to 3 times a week'



Top 3 genres watched



High income

(people who have declared a high yearly gross household income)



Highest percentage paying for subscriptions

71% of respondents in the High-Income group pay for video content subscriptions, which is higher than the European average of 60%.

Majority expect expenditure on video content to increase or stay stable

When asked how they expect their budget for video content to change over the next six months, 86% of respondents in the High-Income group expect it to increase or stay the same; only 14% predict a decrease. Of those who predict a decrease, when asked how they would decrease it, a higher percentage (54%) would drop a subscription, compared with 25% who would change to a cheaper subscription or an offer with ads.

Most prefer to pay to avoid ads

Unsurprisingly for this target group, an above-average percentage of respondents (64%) prefer to pay to see shows without ads (European average: 58%), and a below-average percentage of respondents (53%) state that advertising does not bother them if it means access to premium shows for free or at a lower cost (European average: 56%).

Below-average interest in targeted ads

The High-Income group shows a below-average interest in targeted ads – 35% are interested in ads more relevant to them (European average: 37%).

Varying interest in new Netflix offer

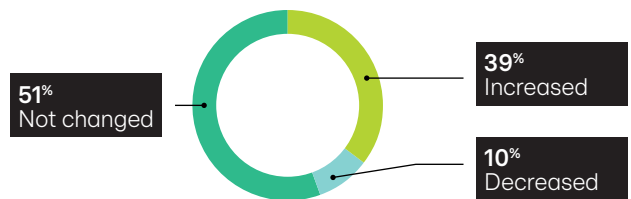
In countries where Netflix's new 'Basic with Ads' plan is not yet available, the High-Income target group shows a below-average interest in subscribing to it, with 45% of respondents intending to subscribe (average: 47%). However, in countries where it is available, the High-Income group shows an above-average interest, with 42% of respondents intending to subscribe (average: 40%).

Household spend on video content subscriptions

€46

Average monthly spend on video content subscriptions

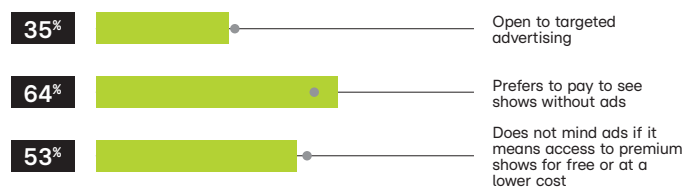
Household spend has...



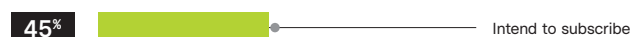
In the next six months, expects household spend to...



Perception of advertising



Awareness of new Netflix offer



Device usage and viewing behaviours per **country**

As well as presenting and interpreting the results from Europe as a whole and per target group, it is also important to outline the key findings, plus differences and similarities, across the ten countries included in the research. This in-depth insight will help brands to maximise the results of video advertising campaigns in their own country or to tailor multi-territory campaigns to suit viewing preferences in different countries.



Countries

-  Denmark
-  Finland
-  France
-  Germany
-  Italy
-  The Netherlands
-  Norway
-  Spain
-  Sweden
-  United Kingdom





Watching video content at home is even more popular in Denmark in 2023, with 58% including it among their top-three at-home activities, compared with 51% in 2022. This increase is seen across all target groups: 67% of the Young group include it among their favourite at-home activities (2022: 60%), 57% of the Family group (2022: 44%), and 56% of the High-Income group (2022: 48%). Other popular at-home activities in Denmark in 2023 are taking care of the house (49%) and surfing websites/using social media (48%).

Household budget for video content increases for many

A high proportion (49%) of Danes said that their household budget for video content subscriptions has increased, compared with the European average of 38%.

Below-average interest in targeted advertising

Only 32% of Danish respondents would be interested in receiving targeted ads (European average: 37%), although the Young target group are less reluctant, with 44% expressing interest (Young target group European average: 47%).

Highest percentage willing to pay for ad-free content

Denmark – as well as Norway – shows the highest preference among all countries for paying to see shows without

ads, with 67% choosing this response, compared with the European average of 58%.

Lowest awareness of Netflix's 'basic with ads' plan

Netflix's ad-supported tier is not yet available in Denmark (at the time of the survey), and most Danes were not aware of it. Only 30% already knew about it – the lowest in all countries where it had not yet launched – although 46% would consider subscribing to it.

High expenditure on video content subscriptions

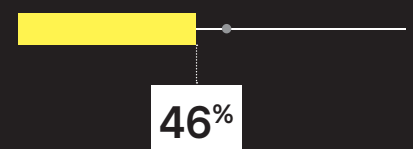
Denmark has one of the highest average monthly expenditures on video content subscriptions at €56 per month. The UK is the only country with a higher average spend.

Technical set-up

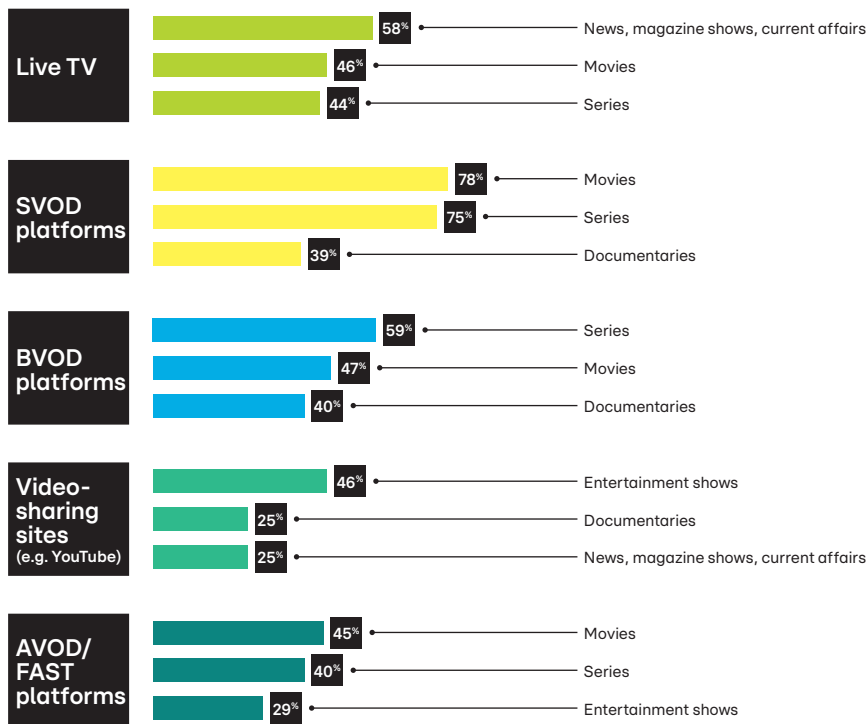
Owns Smart TV



Purchased Smart TV in last two years



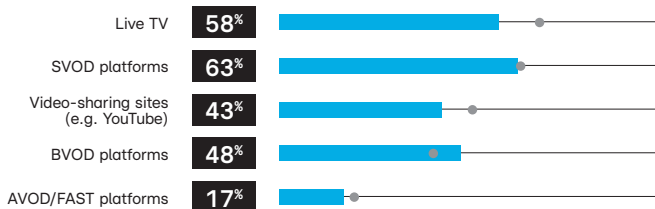
Top 3 genres watched



Consumption of video content



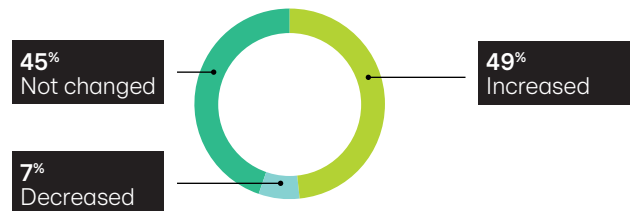
Watches 'every day or almost every day' or '1 to 3 times a week'



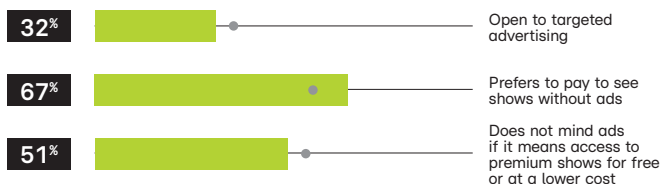
Household spend on video content subscriptions

€56¹ Average monthly spend on video content subscriptions

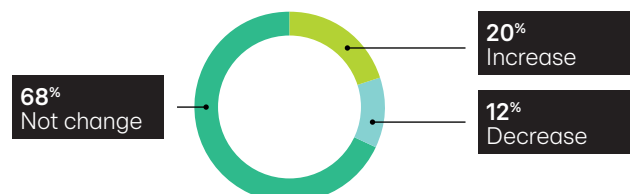
Household spend has...



Perception of advertising



In the next six months, expects household spend to...





More respondents in Finland include watching video content among their top-three at-home activities than in any other country – 64% compared with the European average of 57%. This is twelve percentage points higher than closest contender surfing websites/using social media, which 52% of Finns include in their top three.

Below-average take-up of Smart TVs

Finns still show below average take-up of smart TVs, with 66% owning a smart TV (European average: 73%) and 47% buying a smart TV in the last two years (European average: 54%). Recent purchases of smart TVs are still higher than classic TVs, however, as only 17% report buying a classic TV in the last two years.

BVOD and live TV viewing high, SVOD and AVOD/FAST viewing low

Driven by the popularity of BVOD platforms such as MTV Katsomo and Ruutu, BVOD viewing is higher in Finland than in any other country surveyed. Compared with the European average of 41%, 58% of Finns watch BVOD platforms 'every day or almost every day' or 'one to three times a week'. Live TV is also popular at 72%. The popularity of BVOD and Live TV contrasts with the low percentages watching SVOD and AVOD/FAST platforms, which at 53% and 14% respectively, are the lowest figures among all countries surveyed.

Lowest expenditure on video content subscriptions

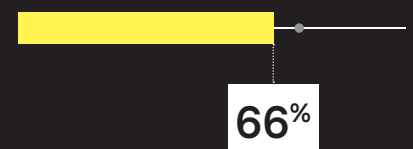
At €32, the average monthly expenditure on video content subscriptions is lower in Finland than in any other country surveyed. Finns are also relatively confident that their household budget for video content subscriptions will not change in the next six months – 70% expect it not to change (European average: 63%), and only 13% think it might increase (European average: 19%).

Highest interest for new Netflix offer among countries where it is not yet available

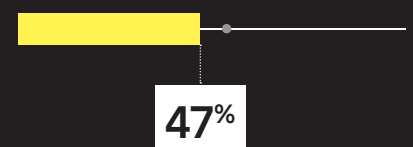
Despite Netflix's ad-supported tier not yet being available in Finland (at the time of the survey), 49% of Finns were already aware of it and 50% would be interested in subscribing to it. These are the highest percentages reported among all countries where it has not yet launched.

Technical set-up

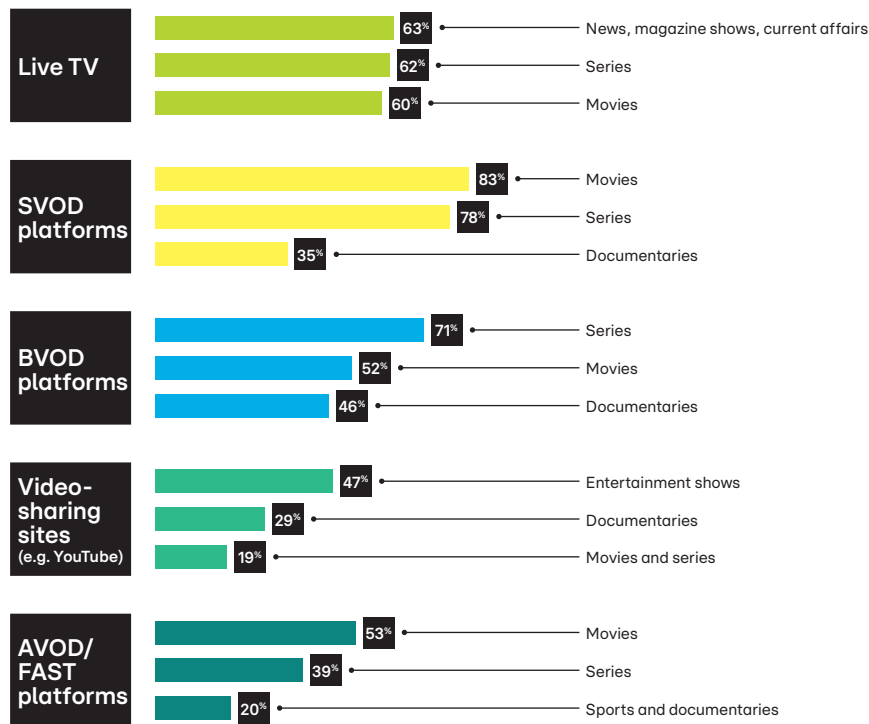
Owns Smart TV



Purchased Smart TV in last two years



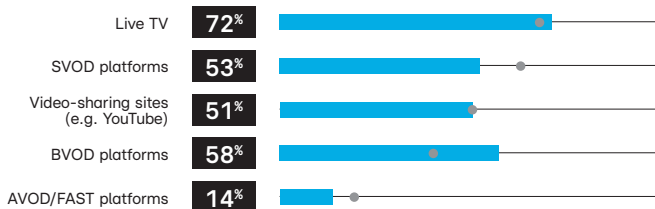
Top 3 genres watched



Consumption of video content



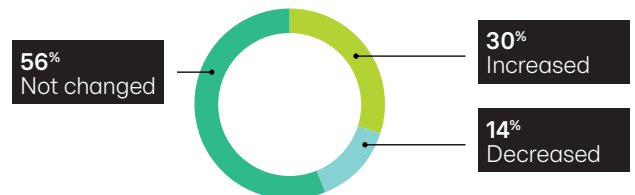
Watches 'every day or almost every day' or '1 to 3 times a week'



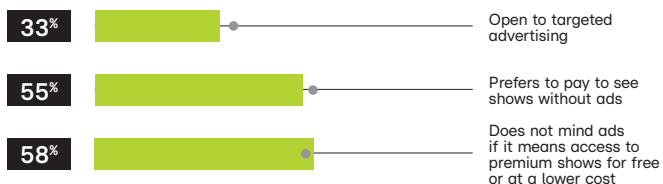
Household spend on video content subscriptions

€32 Average monthly spend on video content subscriptions

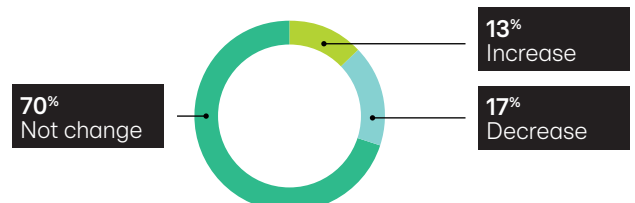
Household spend has...



Perception of advertising



In the next six months, expects household spend to...



France still has the lowest ownership of smart TVs among all countries, with only 56% of respondents owning a smart TV (European average: 73%). However, smart TV ownership has risen from 49% in 2022, and 44% of this year's respondents had bought a new smart TV in the last two years, compared with only 20% buying classic TVs.

Leaders for watching live TV

Live TV is still the favourite viewing option in France, with 81% watching Live TV 'every day or almost every day' or 'one to three times a week', the highest figure among all countries.

Live TV gathers people together and movies are their favourite choice

Live TV gets people together in France – 78% watch Live TV with other people (European average: 71%).

And when they watch Live TV – despite strong competition in this genre from other platforms – movies are their favourite genre, with 73% regularly watching them (European average: 57%), followed by series at 63%.

Lowest interest in targeted ads

Only 30% of French respondents would be interested in targeted ads, the lowest percentage among all countries surveyed. But this figure varies across the target groups, ranging from 46% of the Young group – close to the European average of 47% for this group – to only 27% of the High-Income group.

Of the overall 70% not interested, 49% do not want to share their information, 51% do not want companies tracking and selling their user data, and 59% just do not like ads, even if they are more relevant to them.

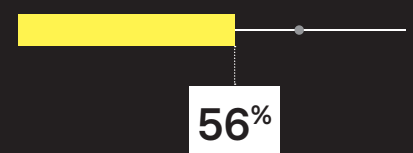
Lowest interest in new Netflix offer

Although over half (55%) are aware of Netflix's new 'Basic with Ads' subscription offer, which launched in France last year, and 58% regularly use Netflix, only 29% expressed an interest in subscribing to it.

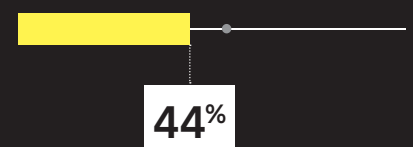
This is by far the lowest percentage among all countries surveyed, even those where the plan had not yet launched.

Technical set-up

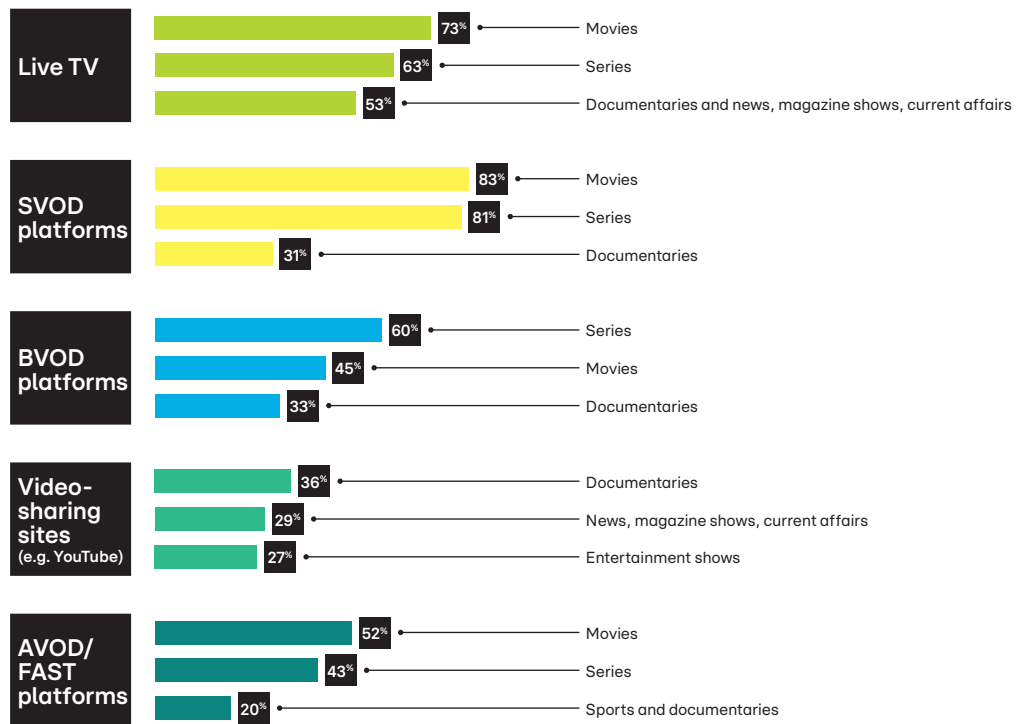
Owns Smart TV



Purchased Smart TV in last two years



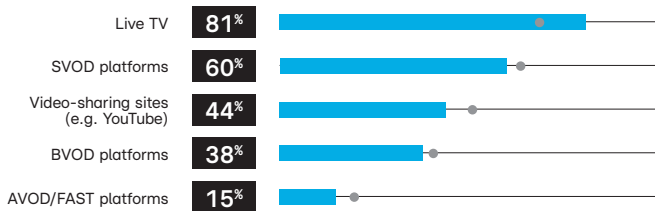
Top 3 genres watched



Consumption of video content



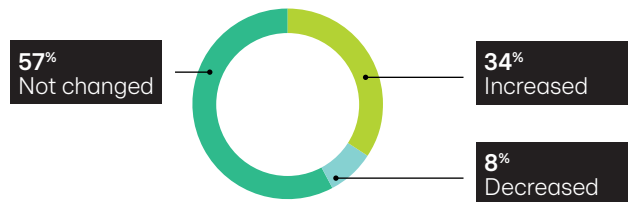
Watches 'every day or almost every day' or '1 to 3 times a week'



Household spend on video content subscriptions

€39 Average monthly spend on video content subscriptions

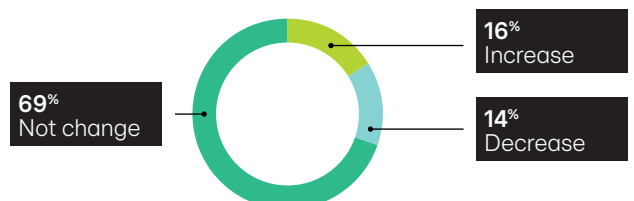
Household spend has...



Perception of advertising



In the next six months, expects household spend to...





Germany is the only country surveyed where watching video content is not the most-mentioned main activity in the home. However, with 45% including it in their top three (2022: 41%), it has gained ground on other activities, climbing from fourth spot in 2022 to joint second spot in 2023 (shared with cooking and baking). Taking care of the house, which still takes top spot, dropped from 56% including it in their top three in 2022 to 49% in 2023, and cooking and baking dropped from 51% in 2022 to 45% in 2023.

Average for Smart TV ownership and recent purchases

Germany exactly matches the European averages for both smart TV ownership (73%) and the number of respondents buying smart TVs in the last two years (54%).

Live TV viewing lowest among all markets

Respondents in Germany watch less Live TV than any other country surveyed, with only 53% watching Live TV 'every day or almost every day' or 'one to three times a week', far lower than the European average of 69%.

Lowest interest in paying to avoid ads

Germans express the least interest in paying to watch ad-free content among all countries surveyed. Only 49% are willing to spend money to avoid ads, compared with the European average of 58%.

Low awareness for new Netflix offer

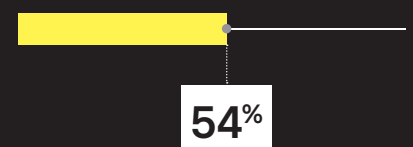
Among the European countries surveyed where Netflix's new 'Basic with Ads' plan has already launched, Germany shows the lowest awareness, with only 48% already aware of it. However, it is not the lowest for subscription intent, with 37% reporting that they would be interested in subscribing to it, compared to the average (among countries where it is available) of 40%.

Technical set-up

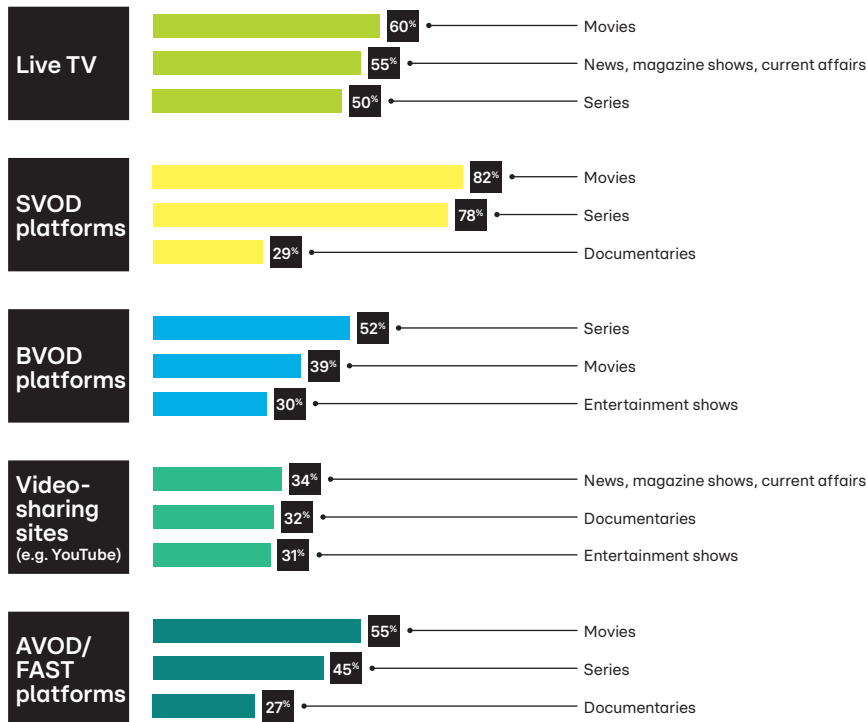
Owns Smart TV



Purchased Smart TV in last two years



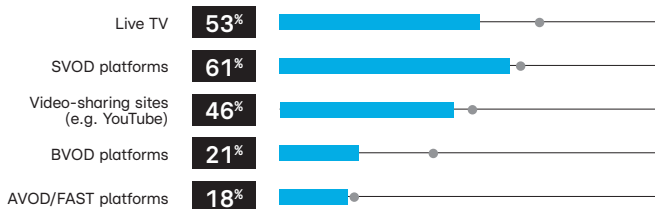
Top 3 genres watched



Consumption of video content



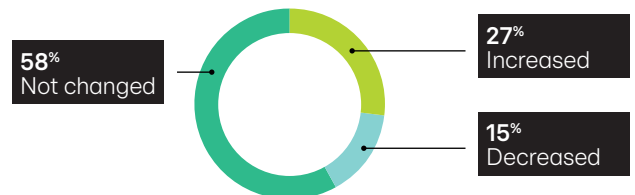
Watches 'every day or almost every day' or '1 to 3 times a week'



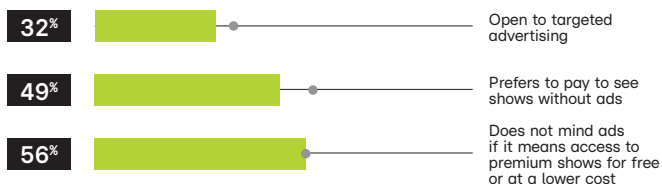
Household spend on video content subscriptions

€35 Average monthly spend on video content subscriptions

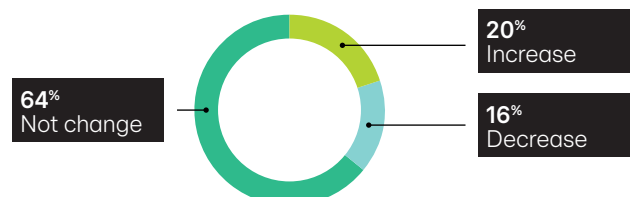
Household spend has...



Perception of advertising



In the next six months, expects household spend to...





Respondents in Italy express the highest interest among all countries in receiving targeted ads that better suit their interests – 49% are interested, compared with the European average of 37%. This higher interest was evident among all target groups – 56% among the Young group (European average: 47%), 57% among the Family group (European average: 45%), and 58% among the High-Income group (European average: 35%).

Watching video content edges ahead of surfing the web

The most-mentioned top-three activities at home remain relatively stable in Italy in 2023, with 54% including watching video content among their top-three at-home activities, compared with 53% in 2022. However, it takes solo top spot in 2023 after sharing first place last year with surfing the web/social networks, which drops slightly to 52% (from 53%).

Strong demand for Smart TVs

Italy has one of the highest percentages for smart TV ownership, with 80% of respondents owning one (European average: 71%). 67% also report buying a smart TV in the last two years, compared with the European average of 54%.

Above average for live TV viewing

79% of respondents in Italy watch Live TV regularly ('every day or almost every day' or 'one to three times a week') – one of the highest percentages among all countries and ten percentage points up on the European average.

Low expenditure on content subscriptions

At €33, Italy's monthly average expenditure on content subscriptions is lower than most countries. Only Finland, at €32, spends less on average.

Many willing to watch ads for low-cost/free access to premium shows

Many Italians (64%) are willing to watch ads if it means they can watch premium shows for a lower cost or for free, compared with the European average of 56%. Only the UK reports a higher percentage.

Highest interest in new Netflix offer

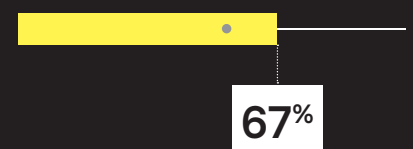
This willingness to watch ads in return for lower-cost access to shows is borne out in Italians' interest in the new Netflix 'Basic with Ads' plan. 62% are already aware of it, and 48% are interested in subscribing to it – the highest percentages among all countries where it is currently available.

Technical set-up

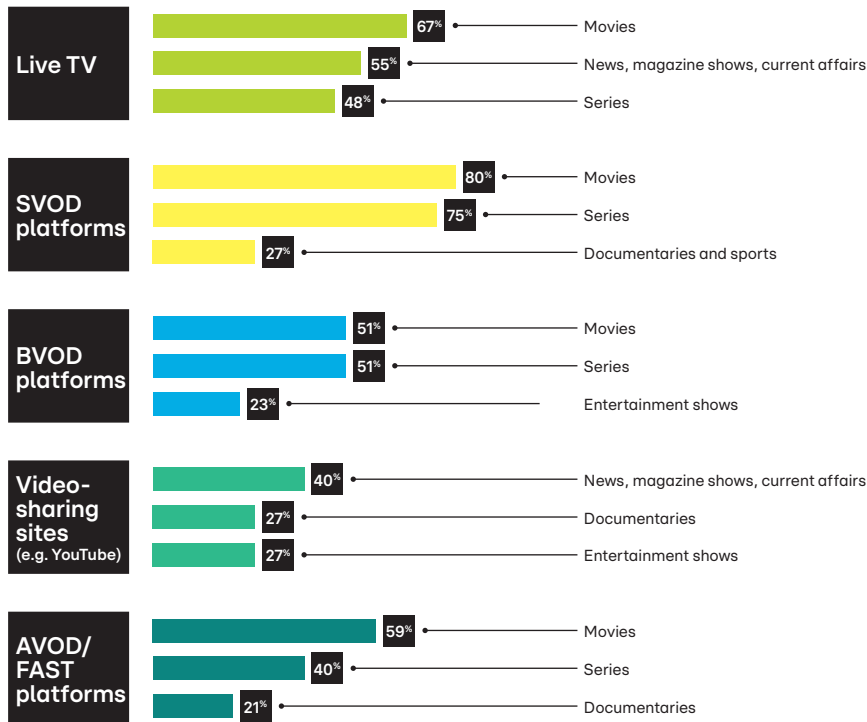
Owns Smart TV



Purchased Smart TV in last two years



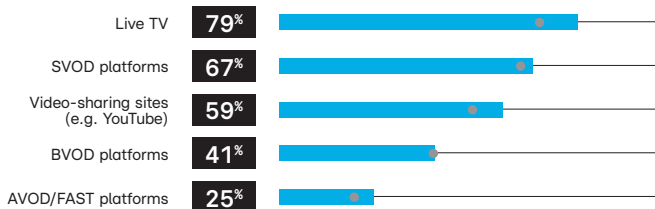
Top 3 genres watched



Consumption of video content



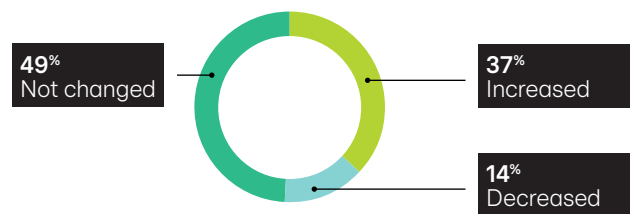
Watches 'every day or almost every day' or '1 to 3 times a week'



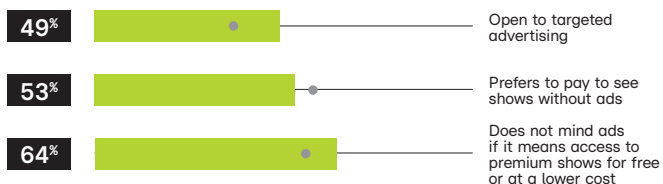
Household spend on video content subscriptions

€33 Average monthly spend on video content subscriptions

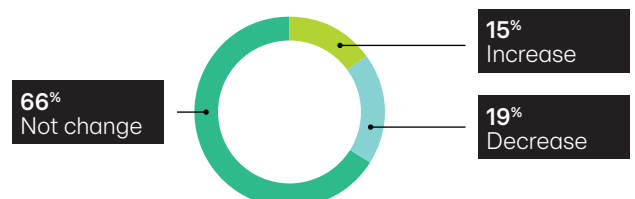
Household spend has...



Perception of advertising



In the next six months, expects household spend to...



The Netherlands



The Netherlands leads the way for smart TV ownership, with 81% of respondents owning a smart TV, the highest percentage among all countries and up from 77% in 2022.

Watching video content rises in popularity

When asked about their at-home activities, 62% of respondents in the Netherlands include watching video content in their top three, significantly higher than the 54% who included it last year. 27% include it as their number-one activity – the highest percentage across all countries – compared with 20% in 2022.

Fans of video-sharing platforms

The Netherlands has one of the highest percentages of respondents watching video-sharing platforms such as YouTube. 58% watch them 'every day or almost every day' or 'one to three times a week', compared with the European average of 51%.

Leaders for Netflix usage

75% of respondents in the Netherlands regularly watch Netflix, the highest percentage reported across all countries.

Highest increase in expenditure on content subscriptions

At €43, the average monthly expenditure on video content is similar to the European average of €42. However, when compared with other countries, the Netherlands has the highest percentage of respondents (53%) who state that their expenditure has increased since the overall rise in prices and the highest percentage (35%) who think it will increase in the next six months. This compares to the European averages of 38% and 19% respectively.

Mixed opinions on cheaper, ad-supported tiers

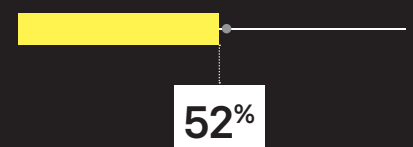
38% of Dutch respondents watch RTL Nederland's streaming service Videoland. Previously an SVOD-only platform, Videoland introduced a cheaper ad-supported tier in 2020. Interest in this ad-supported tier is almost 50:50 among respondents, with 51% expressing interest and 49% not interested. The response is almost the same on Netflix's new 'Basic with Ads' offer, which is not yet available in the Netherlands (at the time of the survey) – 49% are interested; 51% are not.

Technical set-up

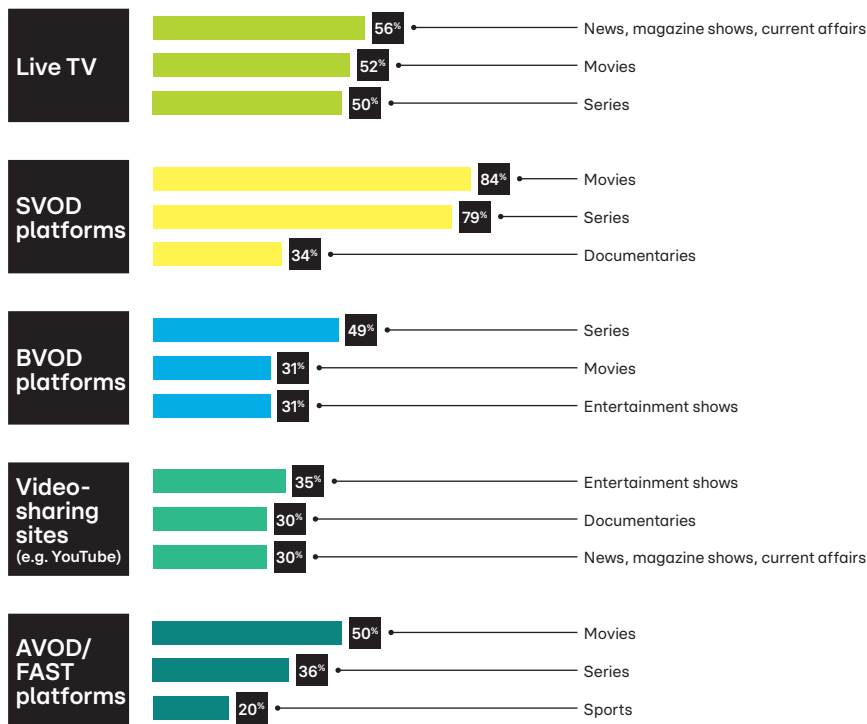
Owns Smart TV



Purchased Smart TV in last two years



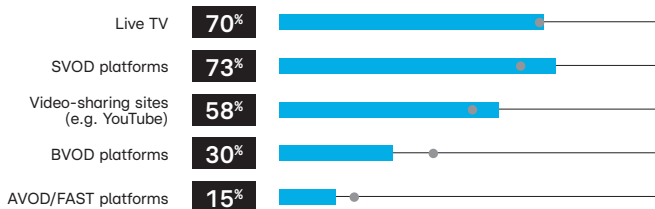
Top 3 genres watched



Consumption of video content



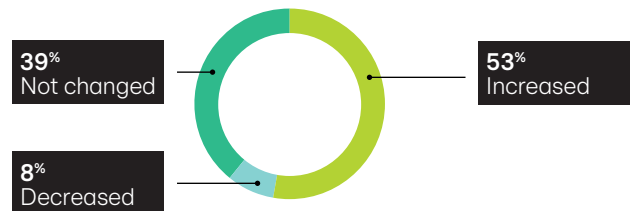
Watches 'every day or almost every day' or '1 to 3 times a week'



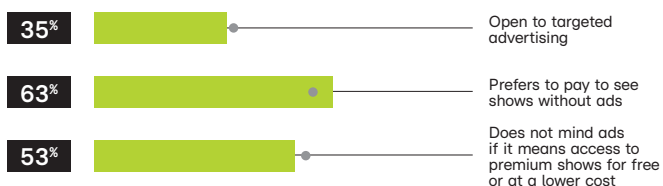
Household spend on video content subscriptions

€43 Average monthly spend on video content subscriptions

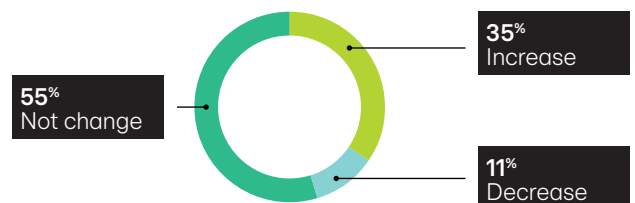
Household spend has...



Perception of advertising



In the next six months, expects household spend to...





Norway was the only Nordic country to express an above-average interest in receiving targeted ads, with 38% interested in ads that better suit their interests (European average: 37%). This compares with 33% in Finland, and 32% in Denmark and Sweden.

Watching video content still top at-home pastime

Watching video content is still the most popular at-home pastime in Norway, with 24% of respondents choosing it as their favourite activity, compared with 23% in 2022. This clearly outranks the other popular at-home activities, with only 16% listing surfing the web/social media as their favourite at-home activity and 15% listing taking care of the house. 61% include watching video content in their top-three activities, one of the highest percentages across all countries and identical to last year's results.

Below-average use of smartphones for watching video content

When asked what devices they often use to watch video content, Norwegians use smartphones less than any other country (except Denmark which reported the same result). 59% watch video content on their smartphone 'every day or almost every day', compared with the European average of 69%.

High expenditure on video content subscriptions

At €47, the average monthly expenditure on video content in Norway is one of

the highest among the countries surveyed. Only Denmark and the UK spend more.

Willing to change subscriptions for new shows or latest offers

As well as having a high average monthly expenditure on content subscriptions, Norwegians are also more open to changing these subscriptions depending on new shows/offers than all other countries surveyed. 42% report changing subscriptions to access the latest shows (European average: 35%), and 38% change subscriptions to access offers and promotions (European average: 33%).

Among highest for preferring to pay for ad-free content

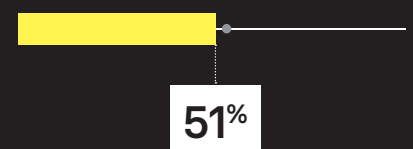
67% of respondents in Norway prefer to pay for ad-free content, the highest percentage across all countries apart from Denmark, which reports the same percentage (European average: 58%). It also has one of the lowest percentages (50%) of respondents who are not bothered by ads if it means free or low-cost access to premium shows, and it has the lowest interest (among countries where it is not yet available) in Netflix's new 'Basic with Ads' plan, with only 44% interested in subscribing.

Technical set-up

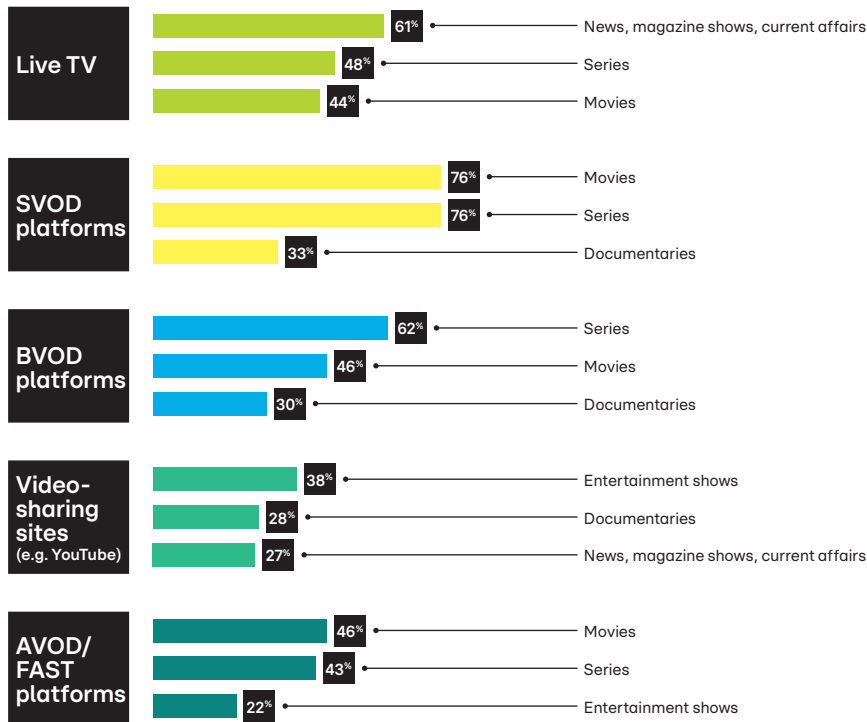
Owns Smart TV



Purchased Smart TV in last two years



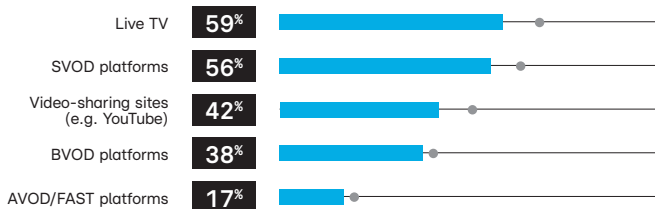
Top 3 genres watched



Consumption of video content



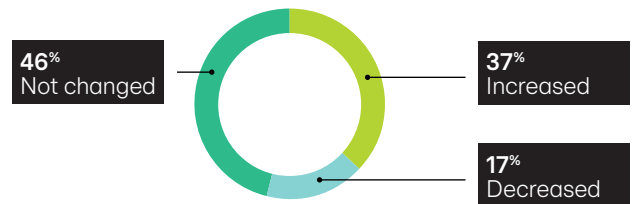
Watches 'every day or almost every day' or '1 to 3 times a week'



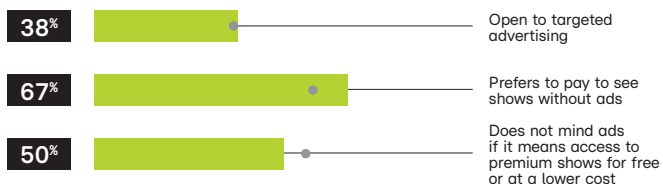
Household spend on video content subscriptions

€47¹ Average monthly spend on video content subscriptions

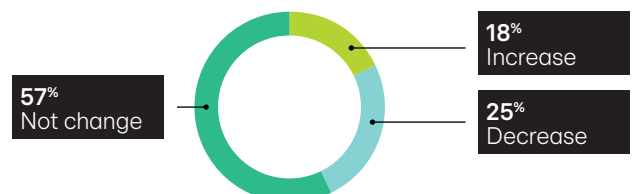
Household spend has...



Perception of advertising



In the next six months, expects household spend to...



Spain



Spain is in the top-three countries for smart TV ownership. 80% report owning a smart TV, the same as in Italy and only one percentage point behind the Netherlands.

Fans of SVOD and live TV

A higher proportion (75%) of Spanish watch SVOD platforms on a regular basis ('every day or almost every day' or 'one to three times a week') than in any other country. Live TV channels are also popular, with 78% regularly watching. Spain also has the highest percentage (27%) of respondents regularly watching AVOD/FAST platforms.

More stability on expenditure expected

Although 40% of respondents in Spain report that their video content expenditure has increased, compared with the 38% European average, the majority (61%) expect their expenditure to stabilise over the next six months.

Simplified access a priority

As well as highlighting that Spanish viewers use multiple types of platforms for watching video content, the results show that 69% often feel lost in the face of all the content available, the highest percentage across all countries, and 84% – again the highest percentage – would like an interface/platform that gives access to all their content (paid and free).

Above-average awareness of new netflix offer

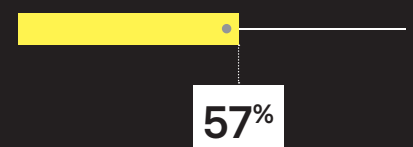
When compared with other countries where Netflix's new 'Basic with Ads' plan is available, awareness is above average in Spain at 59% (average: 56%); however, only 39% express an interest in subscribing to it (average: 40%).

Technical set-up

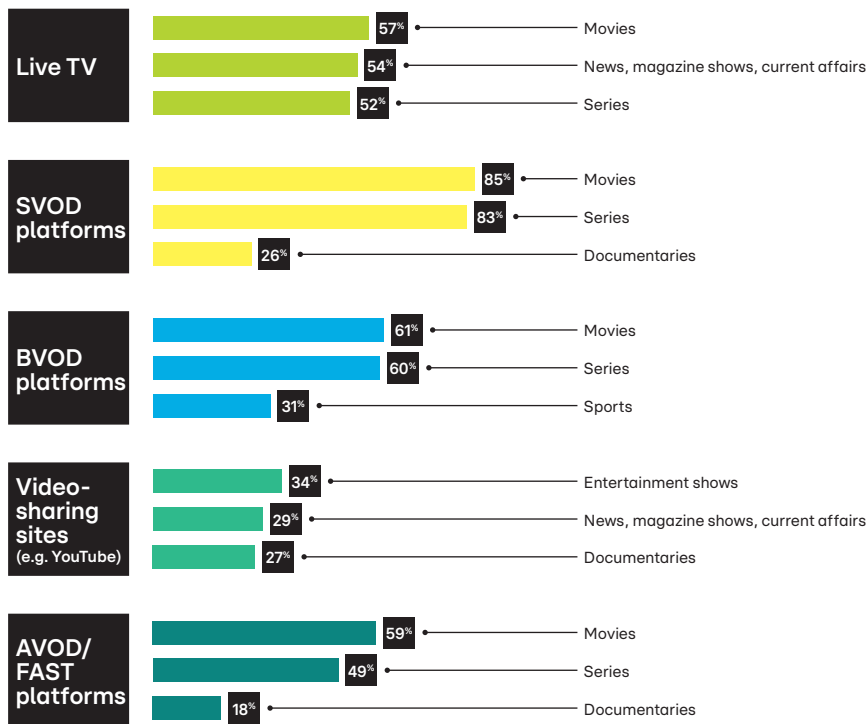
Owns Smart TV



Purchased Smart TV in last two years



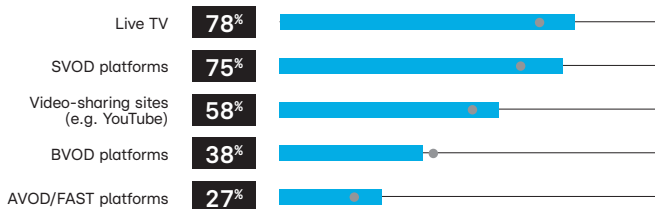
Top 3 genres watched



Consumption of video content



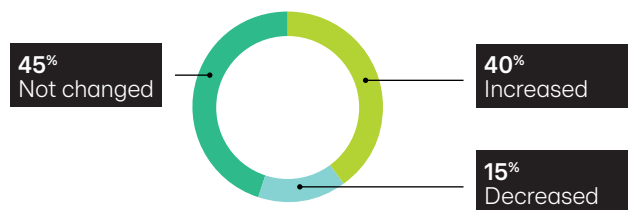
Watches 'every day or almost every day' or '1 to 3 times a week'



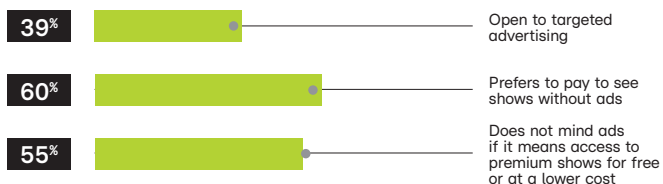
Household spend on video content subscriptions

€39 Average monthly spend on video content subscriptions

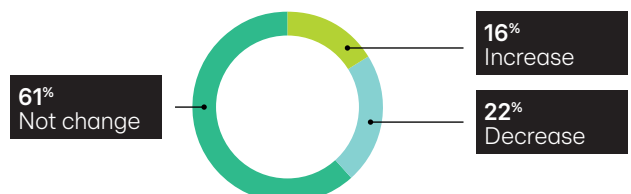
Household spend has...



Perception of advertising



In the next six months, expects household spend to...





Watching video content is still the favourite at-home activity in Sweden, with 24% placing it at number one, compared with 22% last year and the 2023 European average of 21%.

Average ownership of smart TVs

The percentage of respondents in Sweden reporting that they own a smart TV has risen from 70% in 2022 to 73% in 2023. This 2023 figure is in line with the European average.

Video content expenditure decreasing

20% of respondents in Sweden report that their video content expenditure has decreased since the overall rise in prices, and 24% predict that their expenditure will decrease in the next six months. These are the highest percentages among all countries surveyed.

Low interest in targeted ads

Only 32% of Swedish respondents are interested in targeted ads; however, this interest varies widely across the target groups, with 43% of the Young group interested, but only 26% of the High-Income group interested.

Low awareness of new Netflix plan

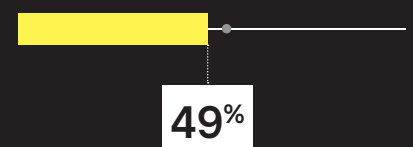
60% of respondents in Sweden regularly watch Netflix. The new 'Basic with Ads' plan is not yet available in Sweden (at the time of the survey), and only 31% were already aware of it, but 45% would be interested in subscribing to it.

Technical set-up

Owns Smart TV



Purchased Smart TV in last two years



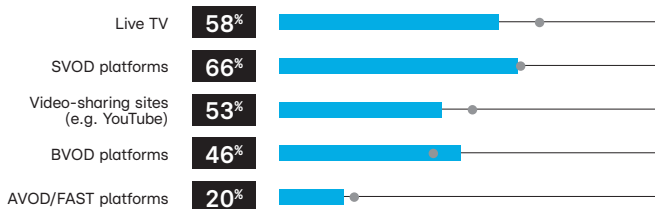
Top 3 genres watched



Consumption of video content



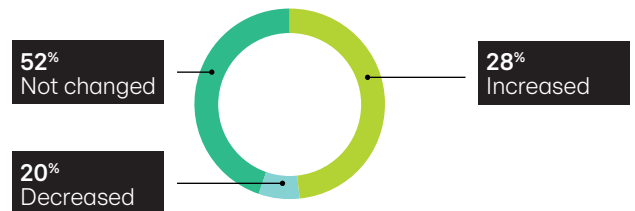
Watches 'every day or almost every day' or '1 to 3 times a week'



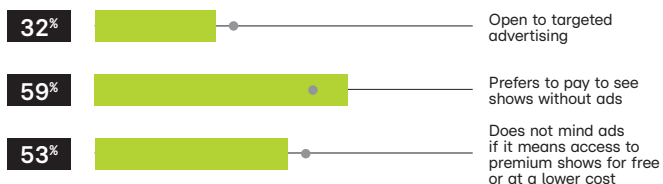
Household spend on video content subscriptions

€39¹ Average monthly spend on video content subscriptions

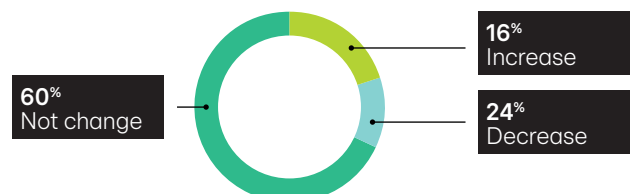
Household spend has...



Perception of advertising



In the next six months, expects household spend to...



United Kingdom



At €57¹, the UK's average monthly expenditure on video content is the highest among all countries and substantially higher than the European average of €42.

Among highest for watching video content

61% of respondents in the UK include watching video content in their top-three at-home activities. Higher percentages are only seen in the Netherlands and Finland. 25% list it as their number-one at-home activity, higher than the European average of 21%.

BVOD popular in UK

BVOD platforms are a popular choice in the UK, with 55% watching them regularly ('every day or almost every day' or 'one to three times a week'), compared with the European average of 41%. 51% regularly watch BBC iPlayer, 34% watch ITV Hub (now ITVX), 31% watch Sky, and 22% watch All4.

Video content expenditure increasing

An above-average proportion of respondents in the UK – 46% compared with the European average of 38% – report that their video content expenditure has increased since the overall rise of prices.

When looking to the future, 24% expected that expenditure to increase in the next six months, compared with the average of 19%.

Open to watching ads in return for free/low-cost access to premium shows

A high proportion (66%) of respondents in the UK are not bothered by ads if it allows them access to premium shows for free or at a lower cost.

At ten percentage points above the European average (56%), this is the highest percentage across all countries.

Above-average interest in targeted ads

41% of respondents in the UK are interested in receiving targeted ads that suit their interests.

This is above the European average of 37% and second only to Italy (49%).

Strong interest in new Netflix offer

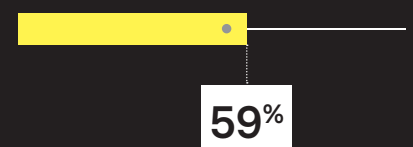
This openness to watching ads in return for access to shows is reflected in the interest in the Netflix 'Basic with Ads' plan. More than half (56%) of respondents in the UK are already aware of the plan, and 47% are interested in subscribing to it – the second highest percentage reported among the countries where it has launched.

Technical set-up

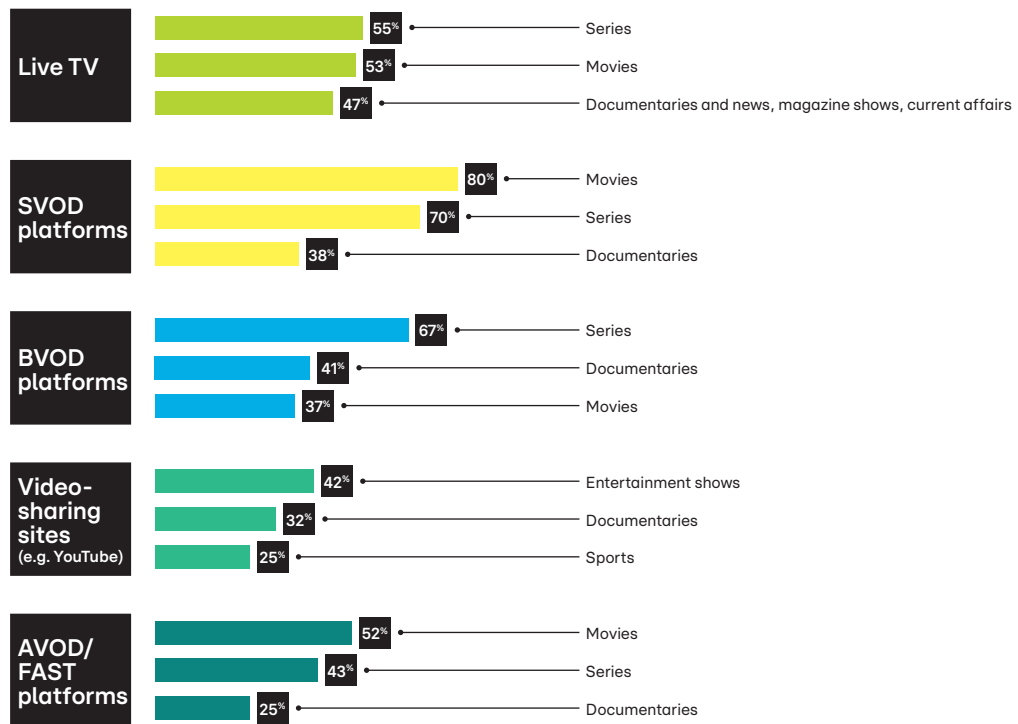
Owns Smart TV



Purchased Smart TV in last two years



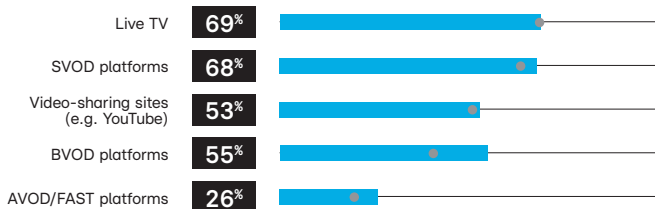
Top 3 genres watched



Consumption of video content



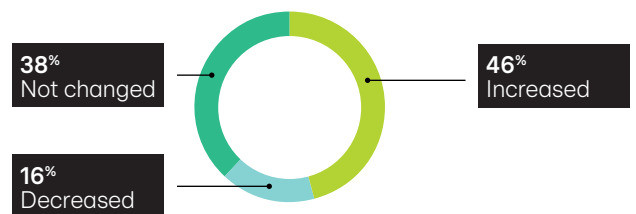
Watches 'every day or almost every day' or '1 to 3 times a week'



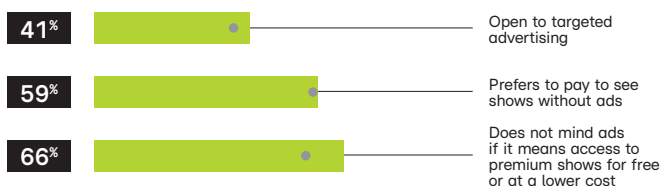
Household spend on video content subscriptions

€57¹ Average monthly spend on video content subscriptions

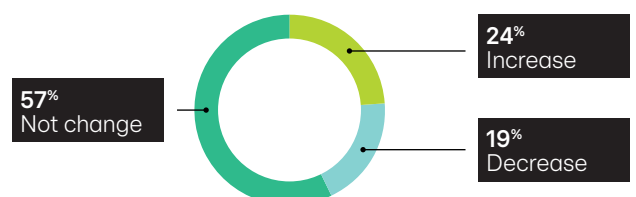
Household spend has...



Perception of advertising



In the next six months, expects household spend to...



Conclusion

When it comes to the challenge of engaging with today's hard-to-reach consumers, CTV advertising has the potential to be an integral part of the solution. This research shows that video continues to be the most important form of media for Europeans in 2023 and the anticipated post-pandemic drop in video consumption has not materialised. The big screen in the living room is still the hero, playing a key role in home life, particularly among the younger demographic, and is not just a device for watching content but also a social tool that gathers people together and makes the house more lively. However, to optimise media planning, there are a number of factors to take into consideration.

One size does not fit all

As shown in this research, viewing patterns and device ownership and utilisation vary between different target groups and different countries. Data collection and privacy regulations, as well as measurement and adtech solutions available, also differ across the European market. These variations, alongside the fragmentation of audiences across multiple platforms, mean that a 'one size fits all' approach is not feasible when it comes to CTV advertising, either on its own or as part of a wider multimedia strategy.

To enhance reach and performance, it is important to consider all available platforms (Live TV, BVOD, etc.) and complementary screens, such as mobile devices, and to choose the appropriate mix to reach the required target audience. This requires precise insights to identify the platforms and devices providing the best reach in each local market; using automated adtech solutions to simplify the process of buying, selling, targeting, and delivery; and working with measurement partners to optimise reach across platforms and devices. For example, Realytics' measurement solution BEE, available in France, allows advertisers to calculate the deduplicated reach of Linear TV, Addressable TV, and BVOD. As a result, budgets can be optimised across these three media types to maximise unique reach and minimise repetition.



Local focus

Focusing on local players that already offer ad-supported content to viewers will enable advertisers to capture the growth of available CTV advertising inventory and maximise opportunities. Many European broadcasters are launching bold content development strategies designed to grow viewership for their VOD platforms. For example, in the UK, ITV is investing in its ITVX platform, increasing the amount of content available from 4,000 hours to 15,000 hours and launching new series every week¹. Although many paid operators have started to diversify their offerings with ad-supported tiers, the amount of available CTV advertising inventory coming from them might remain limited in Europe in the near future.

All ad impressions are not equal

Even on the big screen, all ad impressions are not equal, and there are a number of factors involved in making ads as impactful as possible including co-viewing, sound, and relevance. Co-viewing has been shown to boost ad performance², and with so much passive attention being paid to ads, sound also plays a role in getting eyes on the screen – so it is important to get strong insights on these aspects when selecting platforms. Relevance can also be increased by applying privacy-safe targeting methods such as smartclip's smart Audiences, which enables advertisers to target audience segments based on sociodemographic data and contextual reference.

For anyone navigating the fast-paced world of 21st-century media, finding the perfect balance of the right ad, delivered on the right platform to the right audience is not a simple process. But with in-depth insights, such as that provided in this report, continual development of more advanced and accessible adtech solutions, and expertise – both local and global – offered by partners such as RTL AdAlliance, everyone involved in the CTV advertising delivery chain can optimise their position in the *New Life of the Living Room*. ✕

1 "Introducing ITVX - Britain's freshest new free streaming service launching later this year", retrieved 5 June 2023 from <https://www.itv.com/presscentre/media-releases/introducing-itvx-britains-freshest-new-free-streaming-service-launching-later-year>

2 "Why does TV deliver more business success than any other platform?", retrieved 5 June 2023 from <https://www.itvmedia.co.uk/research/itv-primal-screen>



About RTL AdAlliance

RTL AdAlliance is the sales house that puts all premium content publishers in Europe for international brands under one roof.

Created from the most successful broadcasting, publishing and AdTech companies in Europe, RTL AdAlliance offers brands access to the audience of 100 TV channels, 900 print publications and 5,000 premium web properties – with over 160 million daily TV viewers and more than 4 billion online ad impressions a month in one streamlined service – offering unrivalled reach in Europe and beyond.

RTL AdAlliance makes a difference through the support of 250 media sales experts all over the world. It provides not only this dedicated support but also access to the latest insights and innovations in the media world. Offering market leading AdTech solutions for buying, selling, and customising ad space to help brands make the most of each platform at every stage of the customer journey.

RTL AdAlliance gives advertisers simplified access to premium, brand-safe platforms that reach only the most engaged audiences. Because people are more receptive to messages when they're enjoying top-quality content. Empowering publishers to make better use of their premium platforms by providing smarter, simpler monetisation strategies and dedicated media sales expertise. RTL AdAlliance - simplicity for advertisers and value for publishers. ✕

For more information, please visit www.rtl-adalliance.com or follow us on Twitter, LinkedIn and Instagram.





About smartclip

Smartclip is the adtech development unit of RTL Group – Europe's leading free-to-air broadcaster group.

Our proprietary advertising technology is custom-built for the needs of European broadcasters and publishers – enabling media owners to implement smarter monetisation strategies.

We are committed to delivering the most innovative video ad experiences spanning in-stream, out-stream, connected TV, addressable TV, and gaming – ultimately empowering brands with true cross-screen storytelling opportunities on all devices.

The media sales division of smartclip will merge with RTL AdConnect and G+J i|MS to form RTL AdAlliance, an international advertising and technology sales champion.

Once the merger is complete, smartclip will focus strictly on technology development.

Headquartered in Hamburg, smartclip has offices in Berlin, Munich, Düsseldorf, Cologne, Gütersloh, Stockholm, Oslo, Helsinki, Amsterdam, Milan, and Rome. ✕

**For more information,
please visit www.smartclip.tv
and follow us on Twitter and LinkedIn.**



About Ad Alliance Netherlands



Ad Alliance Netherlands is the video powerhouse of the Netherlands. Founded in 2020, the sales house joins the forces of strong media players such as Warner Bros Discovery, Paramount, Disney, We Are Era, Ziggo Sport and RTL. From this network mindset, Ad Alliance Netherlands goes to extremes as an ally and is the place where the media euro is best spent. With mass and selective reach through a large palette of TV channels, digital platforms and influencers, we offer a solution for every advertiser's objective. Ad Alliance Netherlands is based in Hilversum. ✕

**For more information,
please visit www.adalliance.nl
or follow us on LinkedIn and Instagram.**

Authors

Aurélie Brunet de Courssou
Group Head Strategic Planning
RTL AdConnect

Jean-Baptiste Moggio
Head of Marketing
RTL AdConnect

Dikachi Chizim
Content Marketing Manager Europe
smartclip Europe

Shira Leffel
Executive Director Europe Marketing & Product Education
smartclip Europe

Contacts

smartclip Europe
info@smartclip.tv

RTL AdAlliance
rtladalliance_hello@rtl.com

Contributors

Stéphane Coruble
CEO
RTL AdAlliance

Dr Oliver Vesper
Co-CEO, smartclip Europe,
Deputy CEO/CDO, RTL AdAlliance

Daniel Bischoff
Chief Marketing & Operations Officer
RTL AdConnect

Carine Jean-Jean
Communications Director
RTL AdConnect

Lisa-Theresia Rischke
Head of Brand
smartclip Europe

Andreas Meier
Senior Director Employee Advocacy & Outreach
smartclip Europe

Raphaël Courtois
Insight Manager, Marketing
RTL AdConnect

Sophia Laassibi
Media Analyst, Marketing
RTL AdConnect

Joline Langfritz
Communication Executive
RTL AdConnect

Ingrid van der Werf
Head of Insights & Research
Ad Alliance Netherlands

Mirte Van Deursen
Research & Insights
Ad Alliance Netherlands

Emilie Demarquay
Graphic Designer

Katie Froggatt
Editor
CopyKate





www.newlivingroom.tv