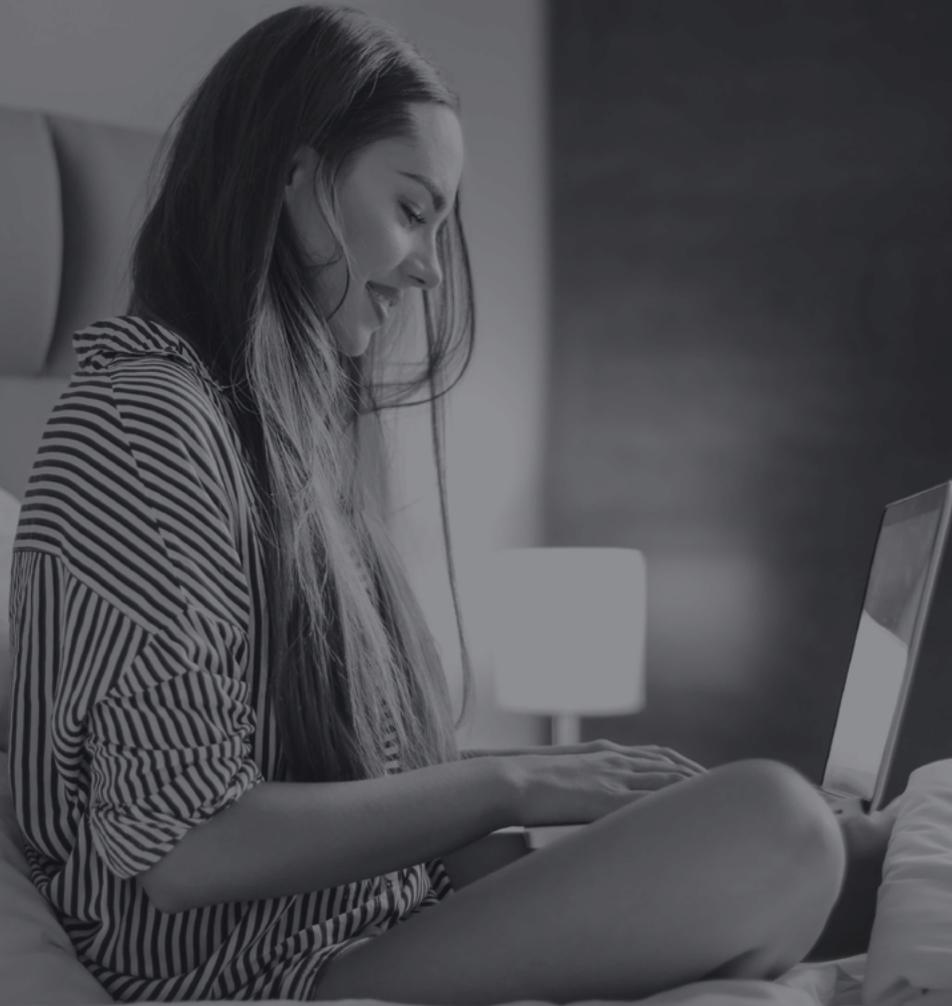


INSIGHTS 2022

AudienceProject 

Linear TV
and streaming

US
UK
Germany
Denmark
Sweden
Norway
Finland



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EDITORIAL

Now is the time for TV advertising to catch up with TV content consumption

Audiences are increasingly shifting their attention from linear TV to streaming/CTV. This presents challenges but also opportunities for the advertisers and broadcasters who adapt the fastest to this change.

Though we see differences in the development of linear TV viewing across countries, the overall trend is that TV consumption is moving from linear TV to streaming, showing that TV advertising outside linear TV holds great potential for advertisers.

In all countries but Finland, the commercially attractive audience of 15-55-year-olds now prefer streaming over linear TV, and in most countries, fewer than half see themselves watching linear TV in 5 years.

Despite this, linear TV is, of course, still a crucial channel for advertisers to build reach, but with the increasing streaming consumption, advertisers have a great opportunity to extend their audience reach with CTV campaigns. And maybe the more addressable TV world can solve some of the fatigue with the ad irrelevance reported on linear TV?.

With coherent audience measurement across linear TV and CTV, advertisers and broadcasters can generate insights into de-duplicated audience reach and frequency of campaigns, thus determining smarter deployment of advertising budgets to where they generate the highest return on investment.

There is much to look forward to in the evolving world of TV, especially for those who harness the power of audience insights to glean the most value. Enjoy the study!

Martyn Bentley

Commercial Director, UK @ AudienceProject

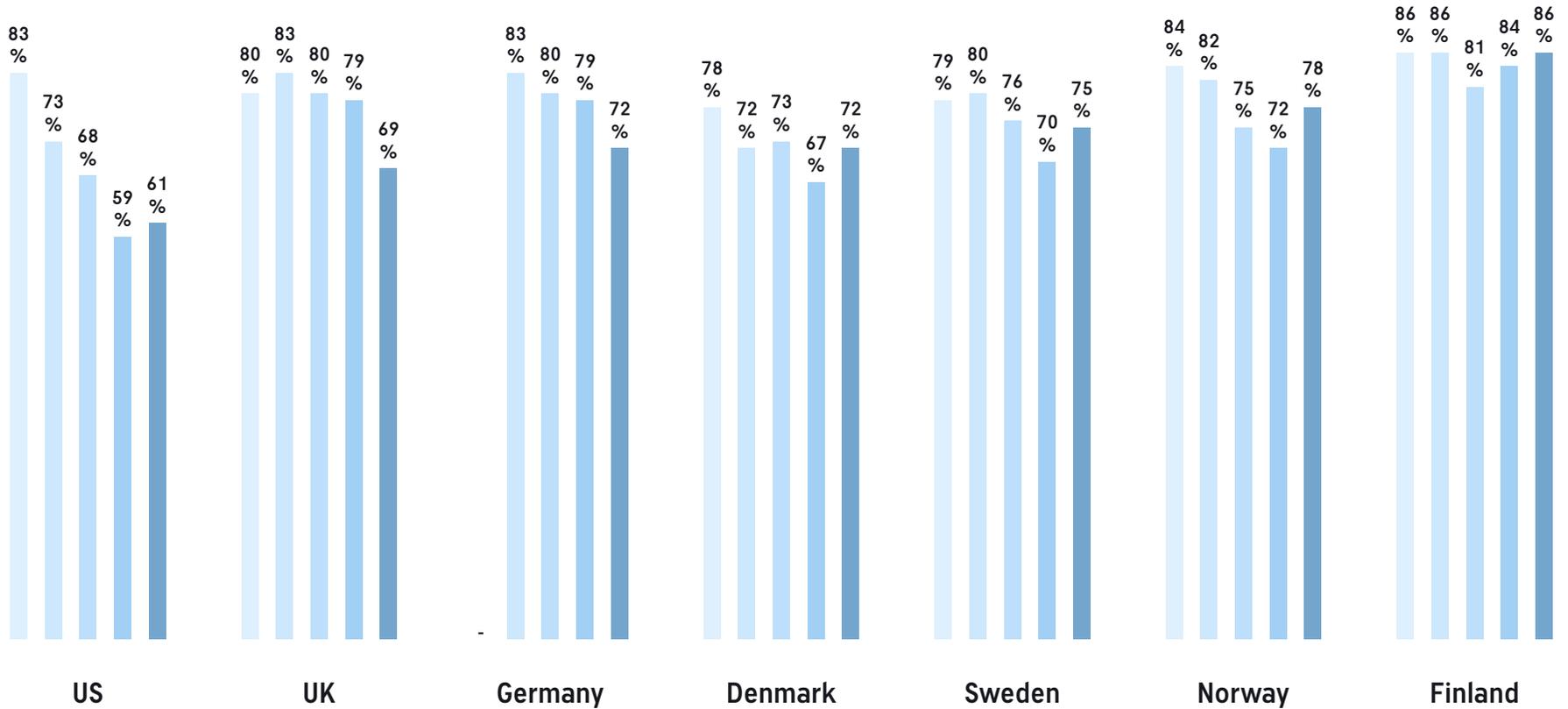
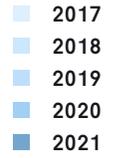
LINEAR TV

Linear TV has been declared 'dead' many times over the last few years. Though it is too drastic, advertisers need to consider their investments in this channel. In the UK and Germany, linear TV viewing drops to a record low level, and less than two-thirds watch commercial TV. On top of that, consumers find linear TV ads irrelevant and their frequency excessive, and fewer than half see themselves watching linear TV in 5 years.

Linear TV viewing drops significantly in the UK and Germany

How many watch linear TV on a weekly basis?

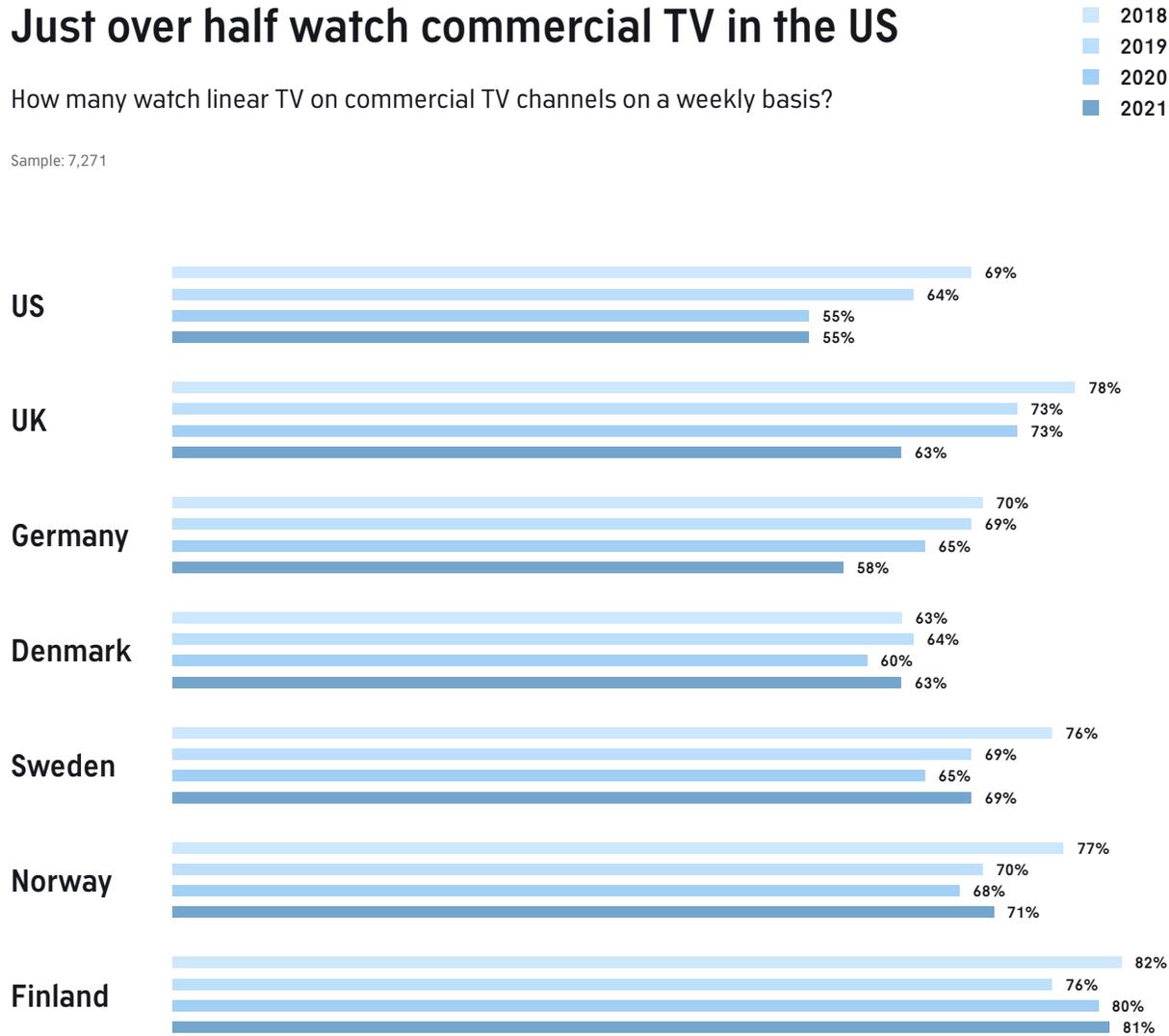
Sample: 7,271



Just over half watch commercial TV in the US

How many watch linear TV on commercial TV channels on a weekly basis?

Sample: 7,271



In most countries, consumers primarily watch linear TV to watch the news

How many prefer watching different types of content when watching linear TV?

Sample: 5,329

	News	Documentaries	Series	Movies	Sports	Reality	Game shows	Talk shows	Other
US	51%	39%	59%	60%	43%	32%	31%	18%	8%
UK	53%	68%	66%	48%	36%	30%	21%	11%	9%
Germany	73%	62%	49%	60%	31%	22%	9%	20%	7%
Denmark	71%	63%	47%	61%	42%	11%	19%	11%	8%
Sweden	67%	53%	50%	45%	44%	15%	17%	18%	6%
Norway	67%	54%	49%	47%	38%	12%	27%	16%	8%
Finland	62%	55%	64%	52%	36%	25%	26%	28%	5%



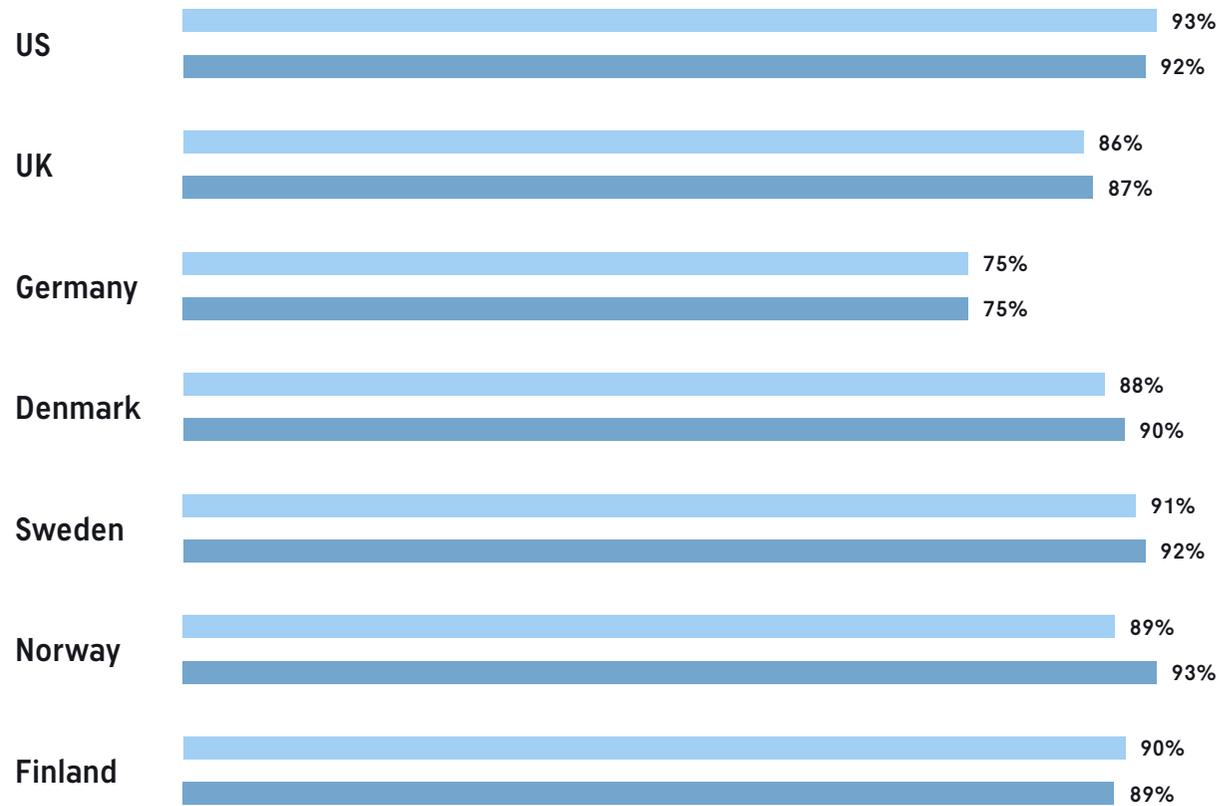


Linear TV ad frequency is still perceived as excessive

2020
2021

How many feel that they see the same advertisements too many times when watching linear TV?

Sample: 4,776

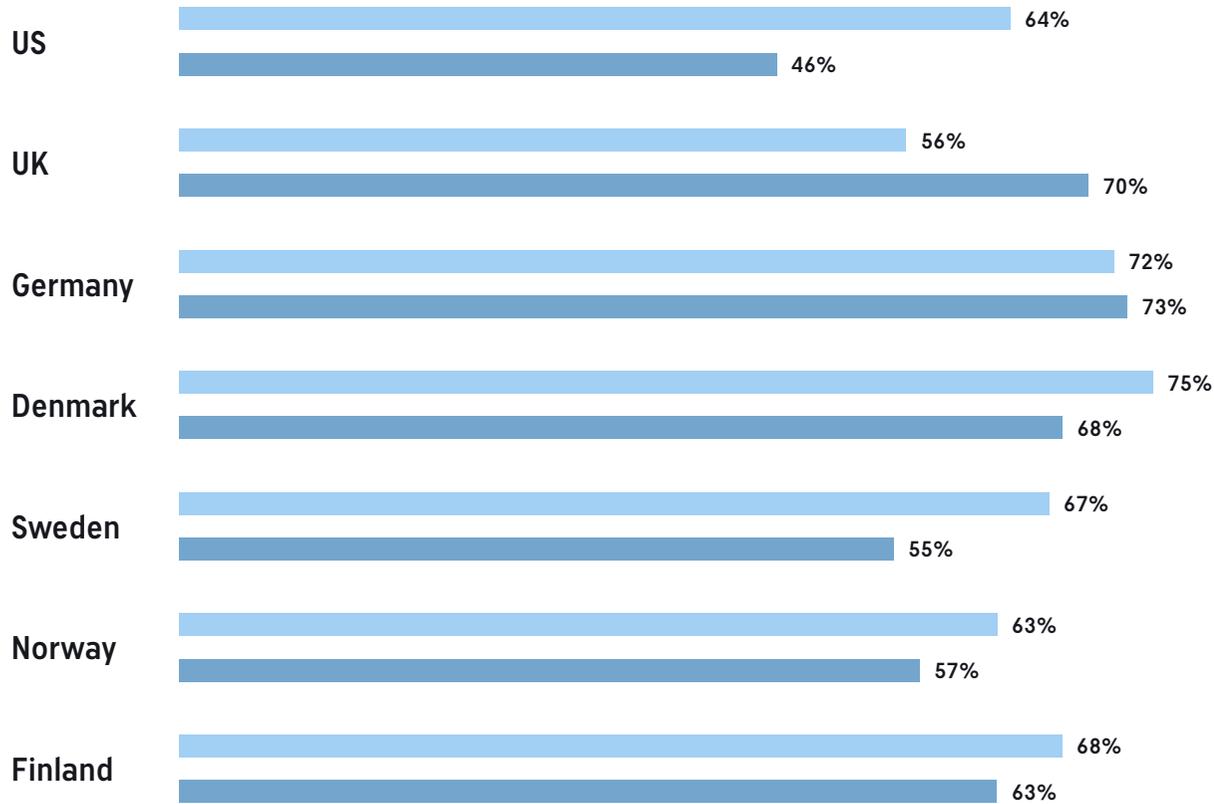


Perceived relevance of linear TV ads drops in the UK

2020
2021

How many feel that the advertisements they see when watching linear TV are irrelevant to them?

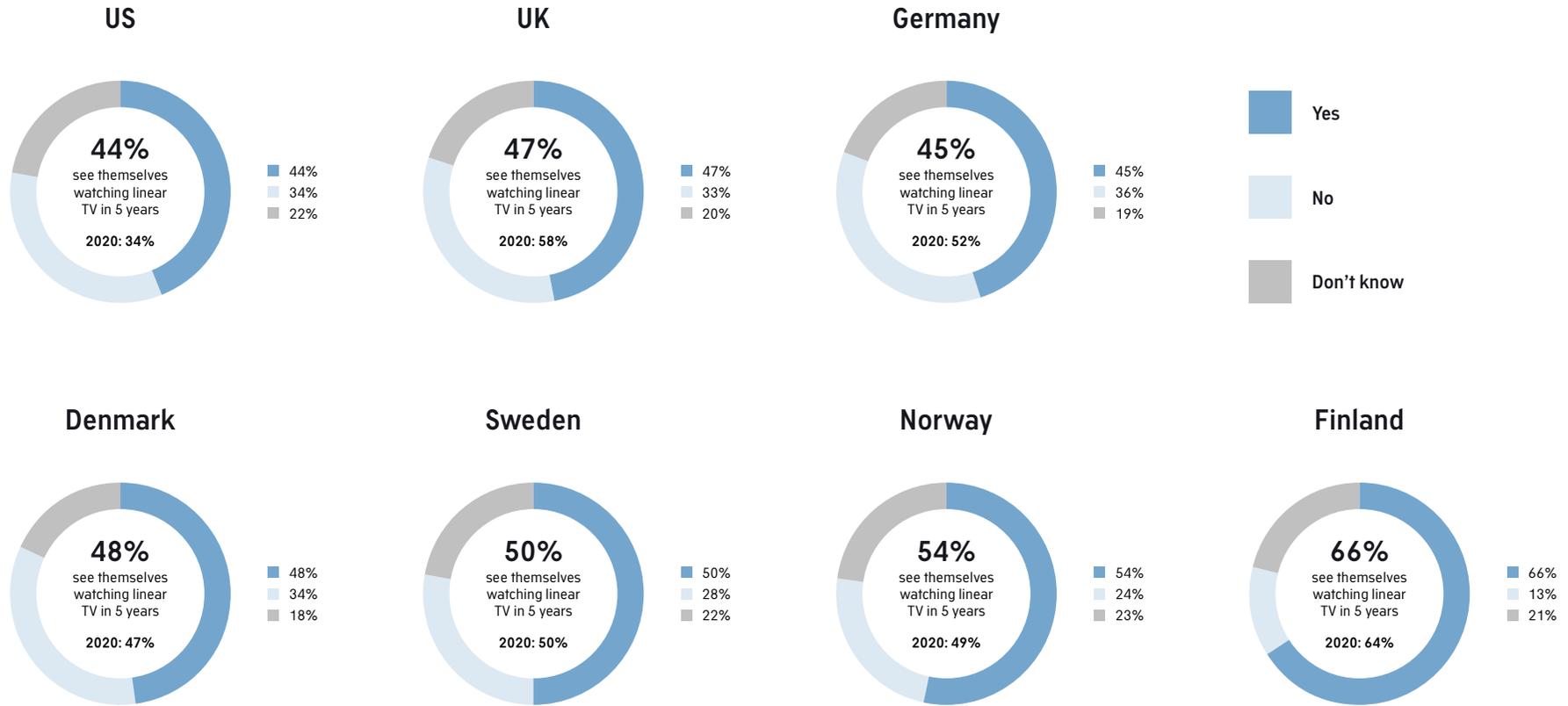
Sample: 4,776



In most countries, fewer than half see themselves watching linear TV in 5 years

How many see themselves watching linear TV in 5 years?

Sample: 7,271

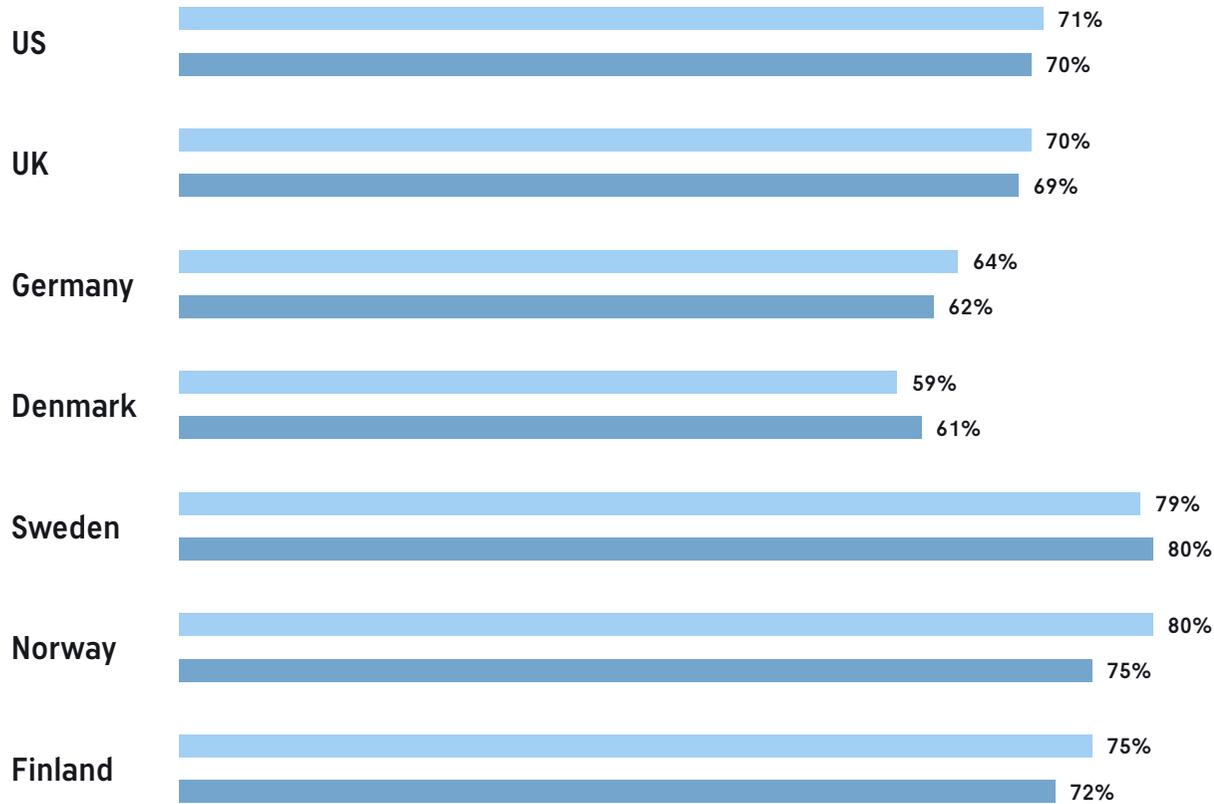


Second screening is still done by the vast majority

2020
2021

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

Sample: 6,943



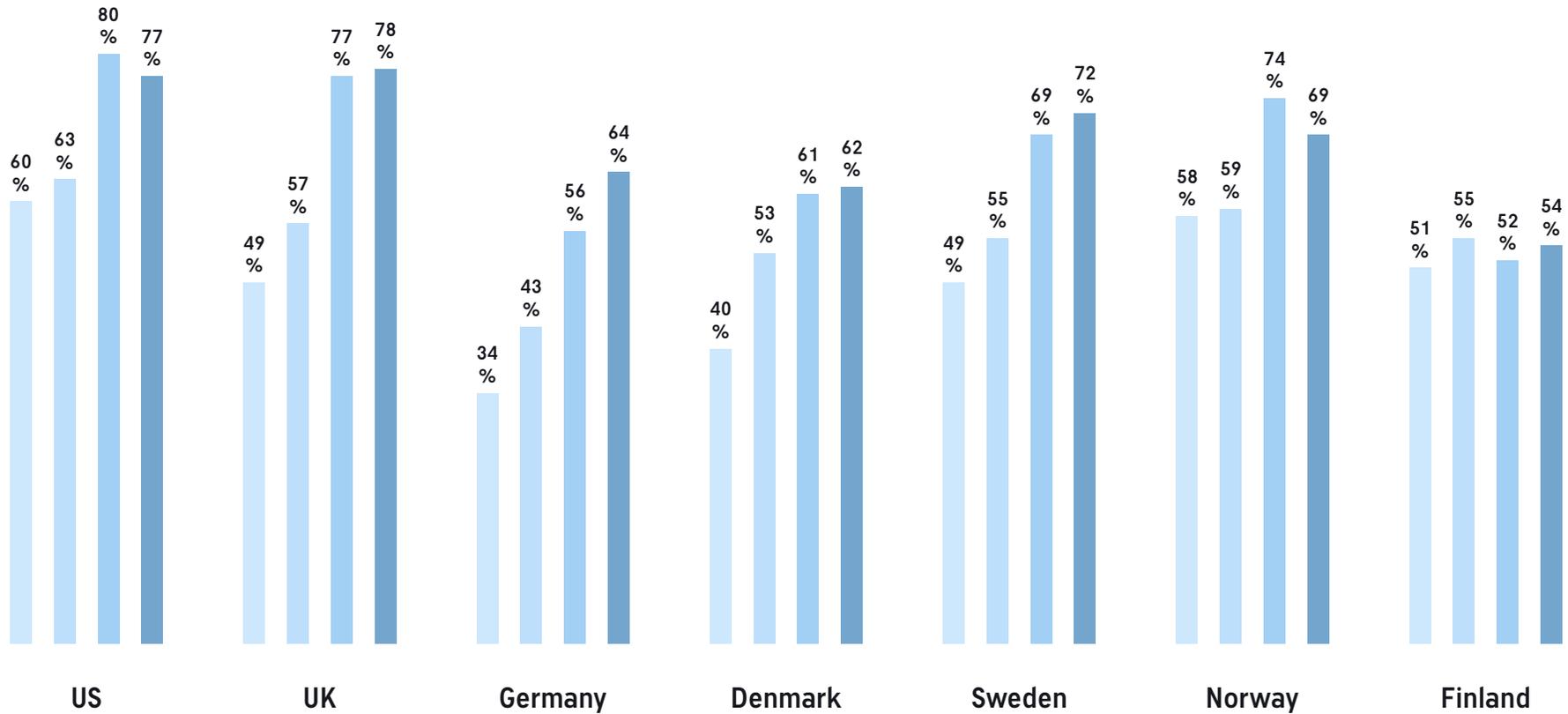
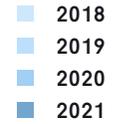
STREAMING

Streaming consumption keeps increasing, and in all countries but Finland, the 15-55-year-olds now prefer streaming over linear TV viewing. In fact, more than a quarter in the US and UK are now pure streamers. This has intensified the 'streaming wars', with more platforms fighting for consumers' attention, providing advertisers with a great opportunity to extend the audience reach of their campaigns on top of linear TV.

Streaming increases significantly in Germany

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

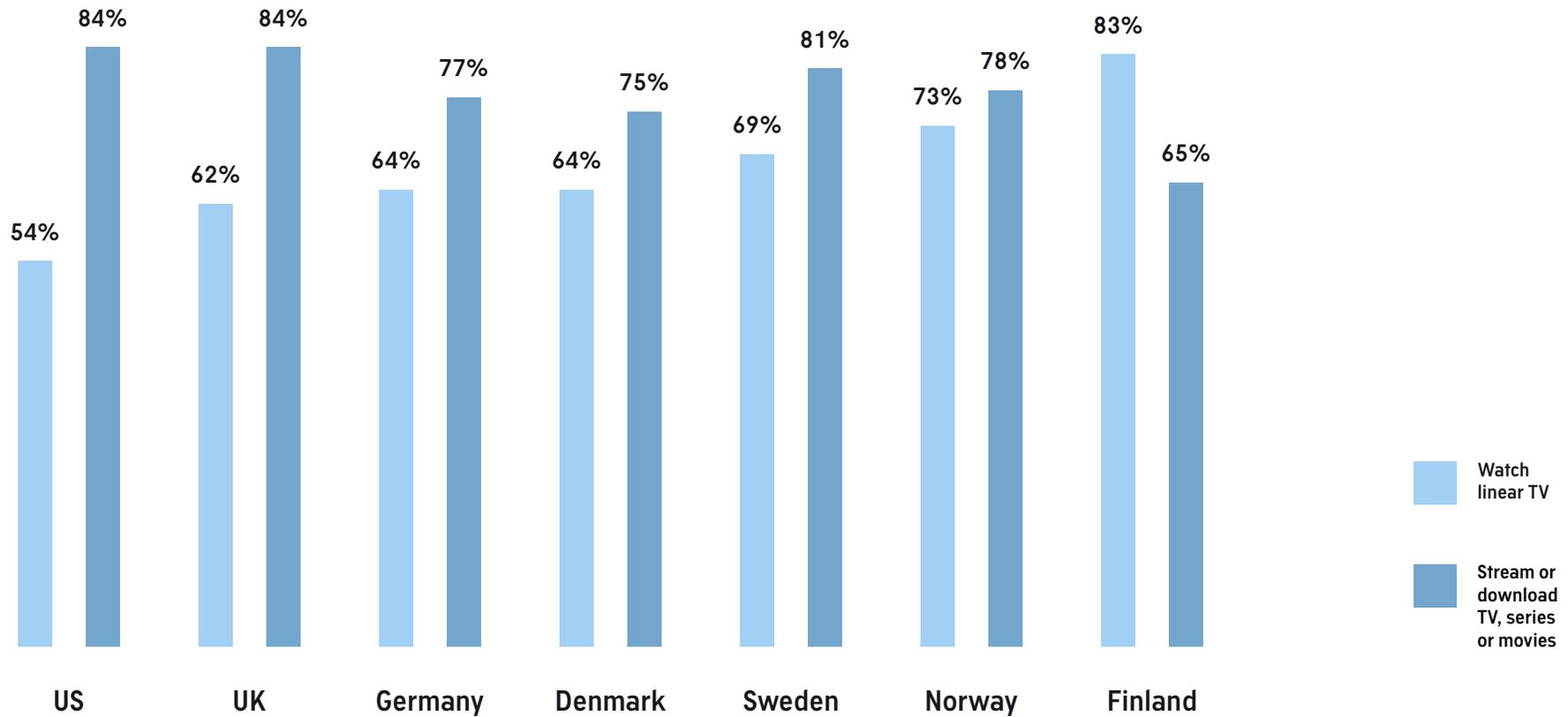
Sample: 7,271



The 15-55-year-olds prefer streaming over linear TV viewing

How many between 15-55 watch linear TV and stream or download TV, series or movies on a weekly basis?

Sample: 5,180

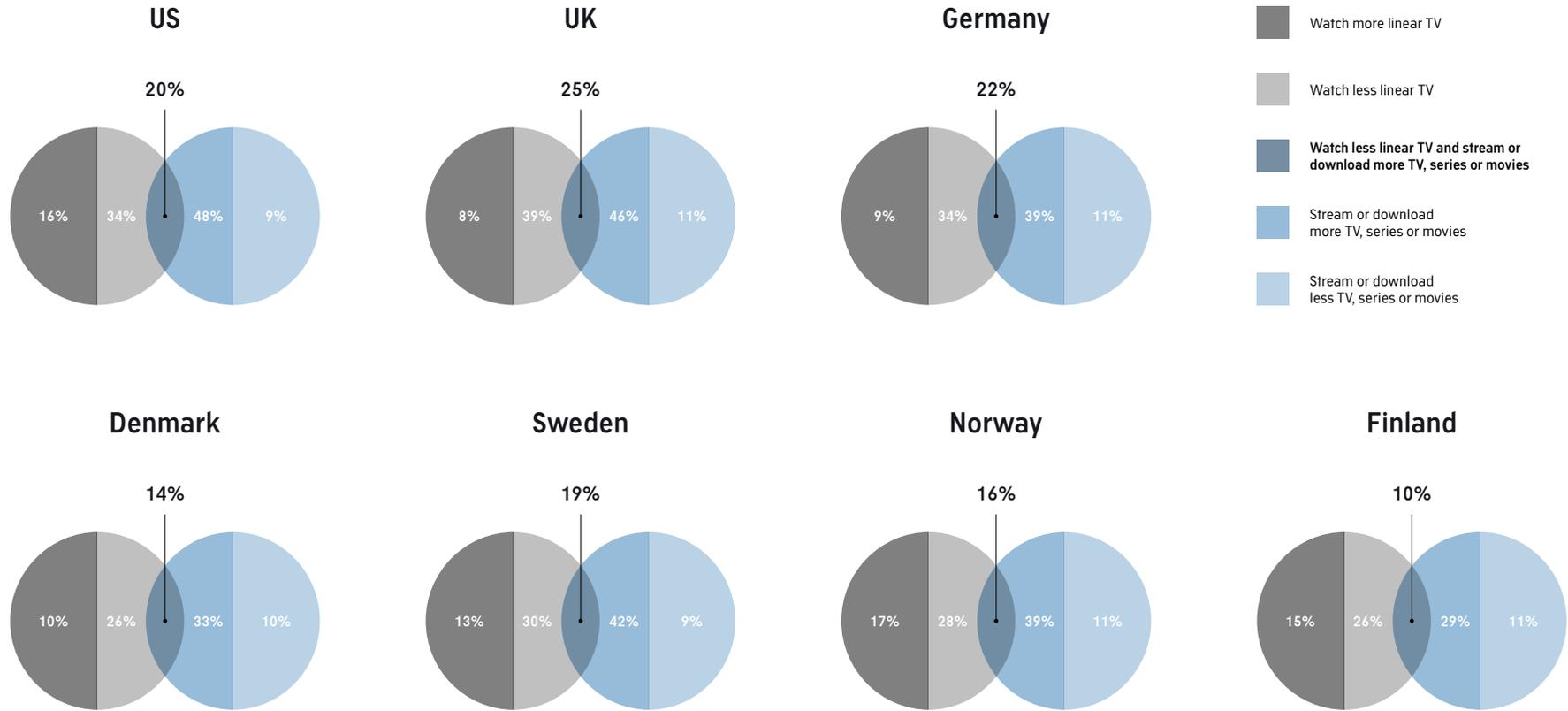


Consumers replace linear TV viewing with streaming

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

Sample: 7,271

Please note: The total percentages of how many are watching more and less linear TV and stream or download more or less TV, series or movies don't add up to 100% as the percentages of how many who don't know if they are watching more or less linear TV and stream or download more or less TV, series or movies are not included in this graph.

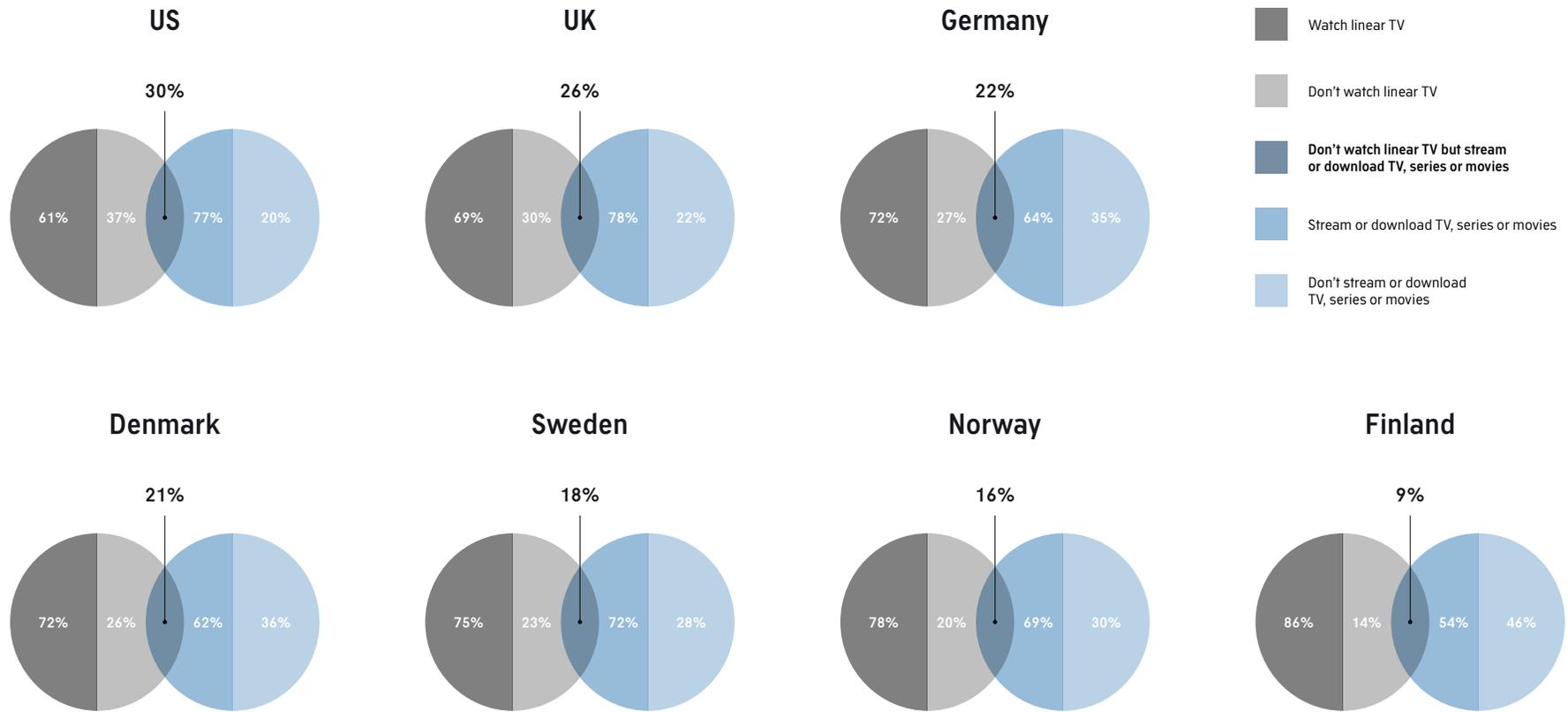


More than a quarter in the US and UK are pure streamers

How many don't watch linear TV but stream or download TV, series or movies?

Sample: 7,271

Please note: The total percentages of how many are and are not watching linear TV and stream or download TV, series or movies don't add up to 100% as the percentages of how many who don't know if they are watching linear TV and stream or download TV, series or movies are not included in this graph.

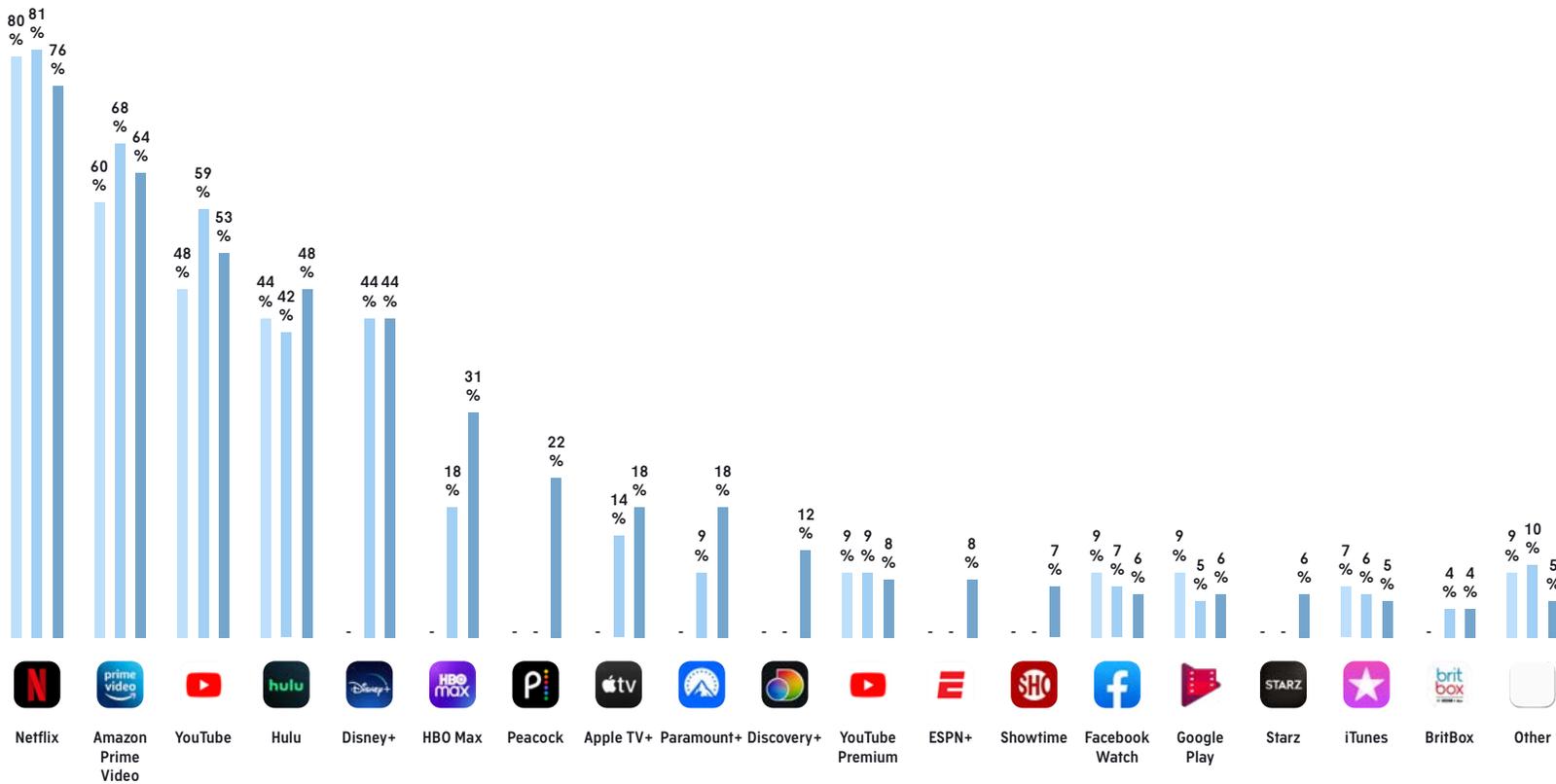


The use of HBO Max increases significantly in the US

2019
2020
2021

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

Sample: 832



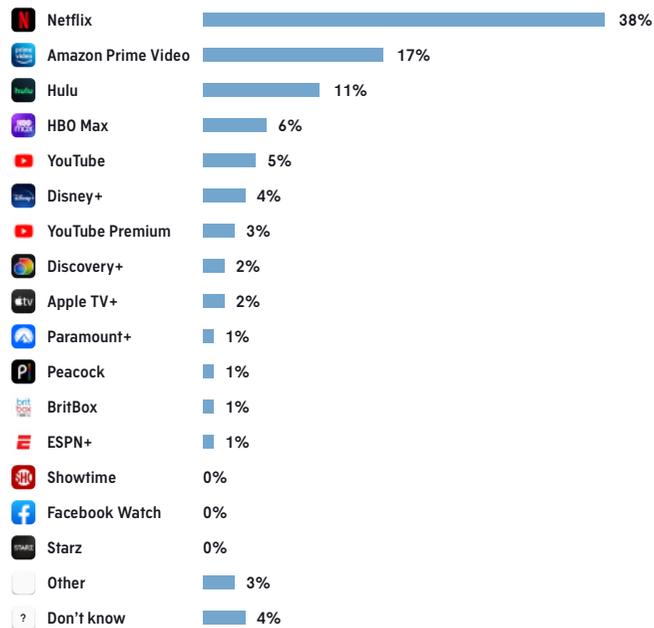
* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Amazon Prime is on par with Netflix in terms of subscribers, but Netflix is preferred

How many Americans prefer and subscribe to different streaming services to watch TV, series or movies?

Prefer the streaming service*

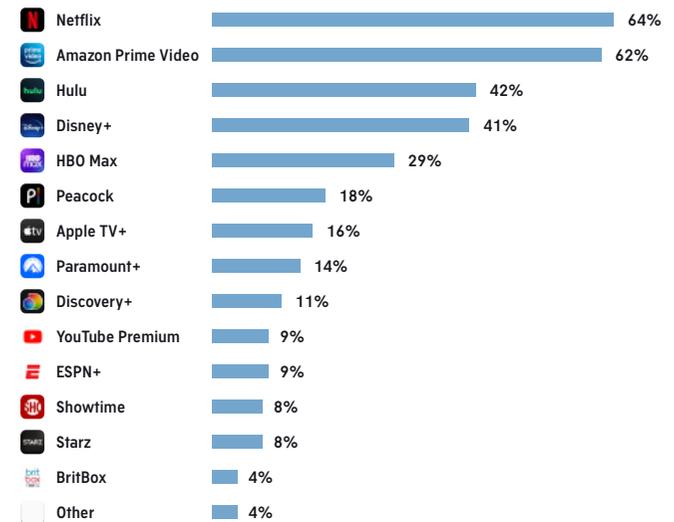
Sample: 832



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Subscribe to the streaming service**

Sample: 1,077



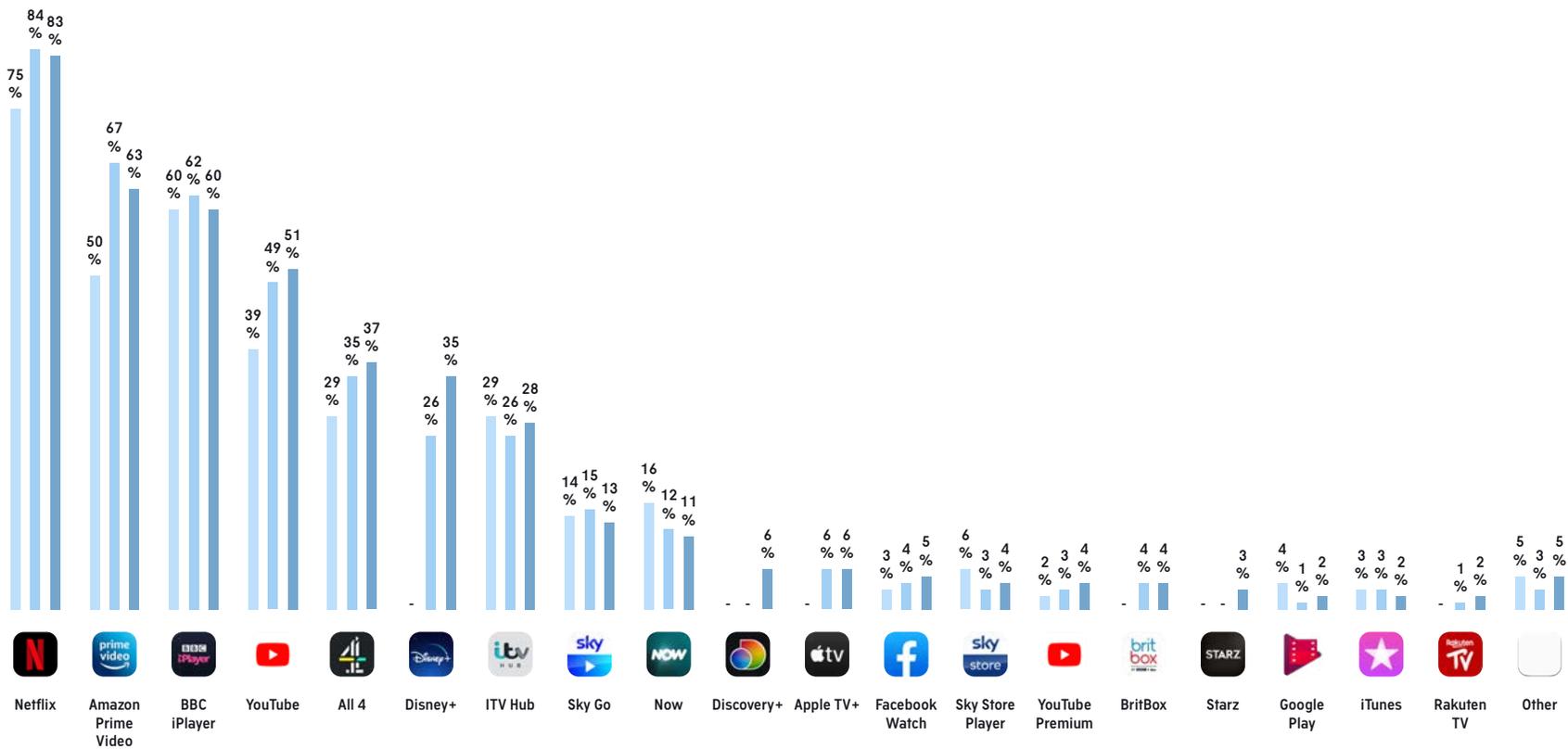
** The figures are based on the entire online population.

The use of Disney+ increases significantly in the UK

2019
2020
2021

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

Sample: 793



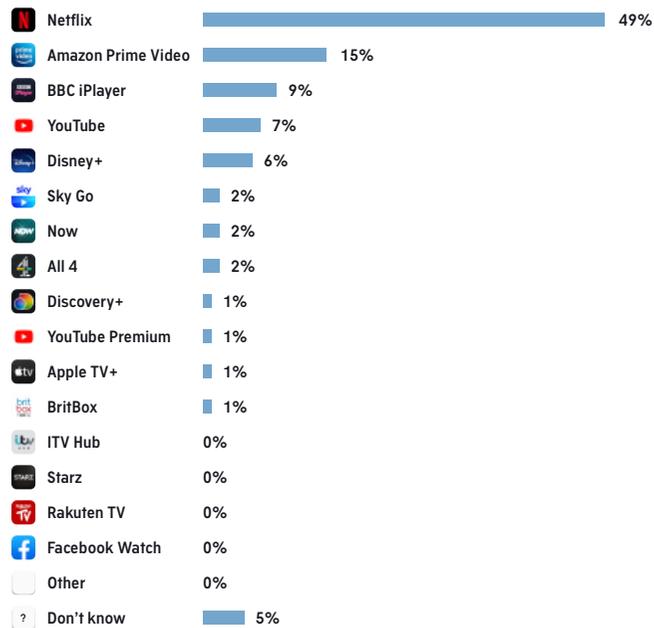
* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Amazon Prime is just behind Netflix on subscribers but nowhere near on popularity

How many Brits prefer and subscribe to different streaming services to watch TV, series or movies?

Prefer the streaming service*

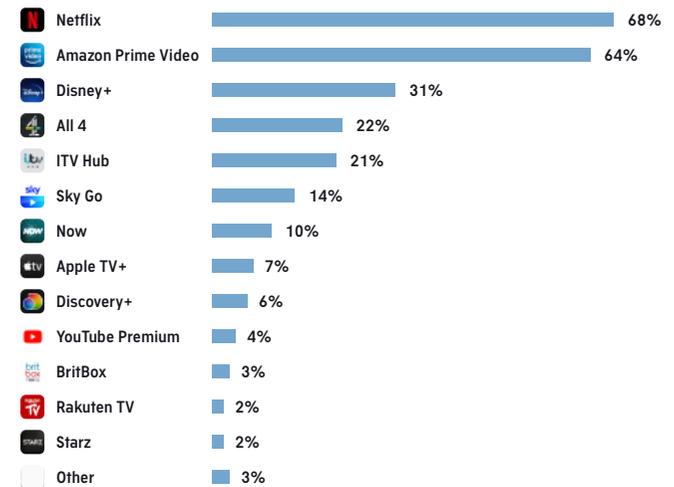
Sample: 793



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Subscribe to the streaming service**

Sample: 1,019



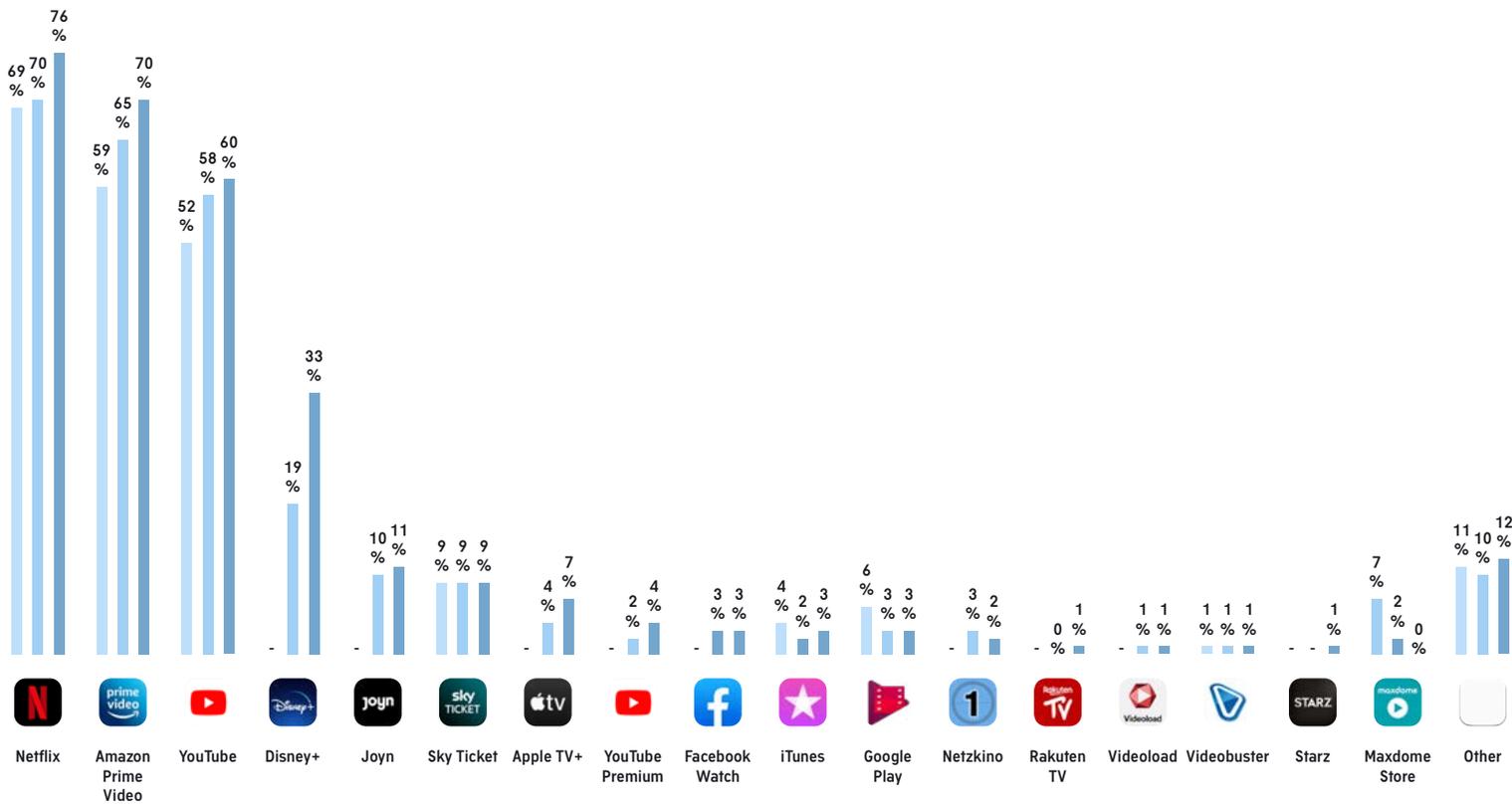
** The figures are based on the entire online population.

The use of Disney+ almost doubles in Germany

2019
2020
2021

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

Sample: 679



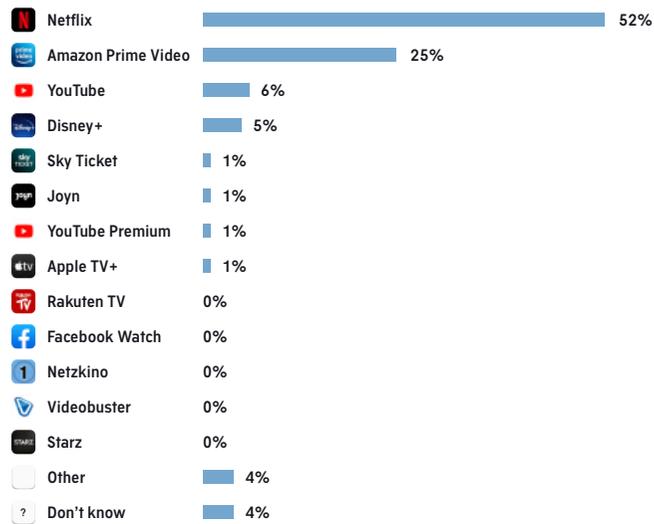
* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Most Germans subscribe to Amazon Prime but prefer Netflix

How many Germans prefer and subscribe to different streaming services to watch TV, series or movies?

Prefer the streaming service*

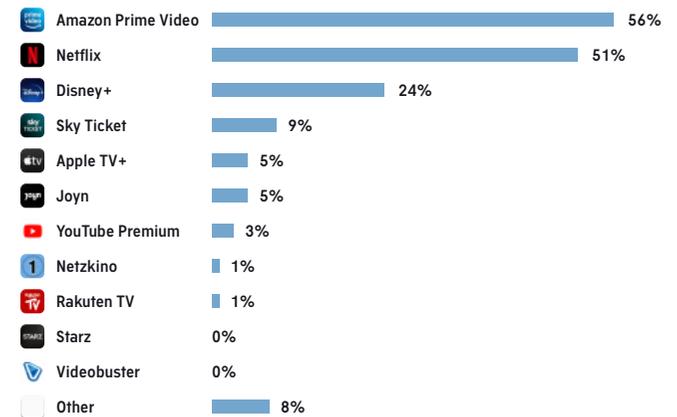
Sample: 679



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Subscribe to the streaming service**

Sample: 1,057



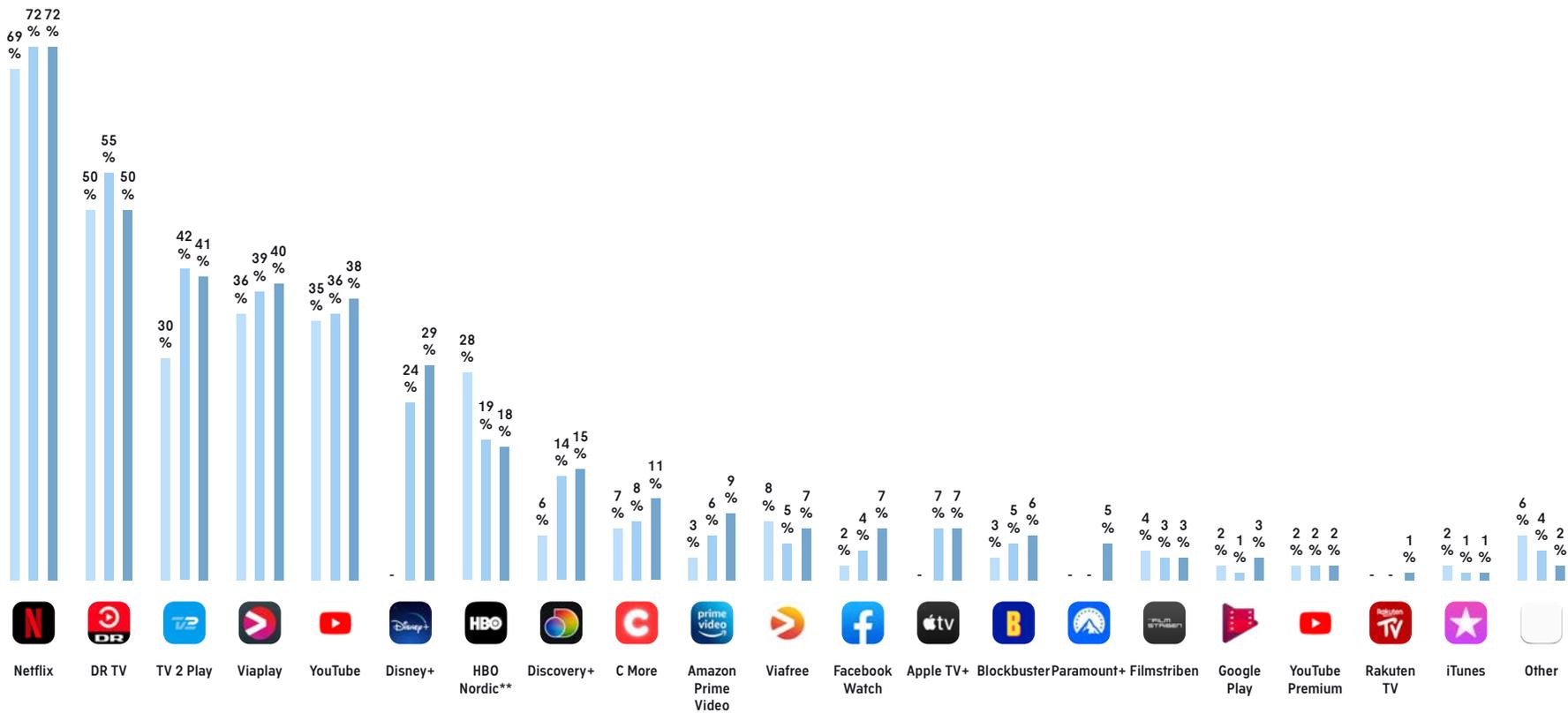
** The figures are based on the entire online population.

Netflix maintains its dominance in Denmark

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

2019
2020
2021

Sample: 633



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

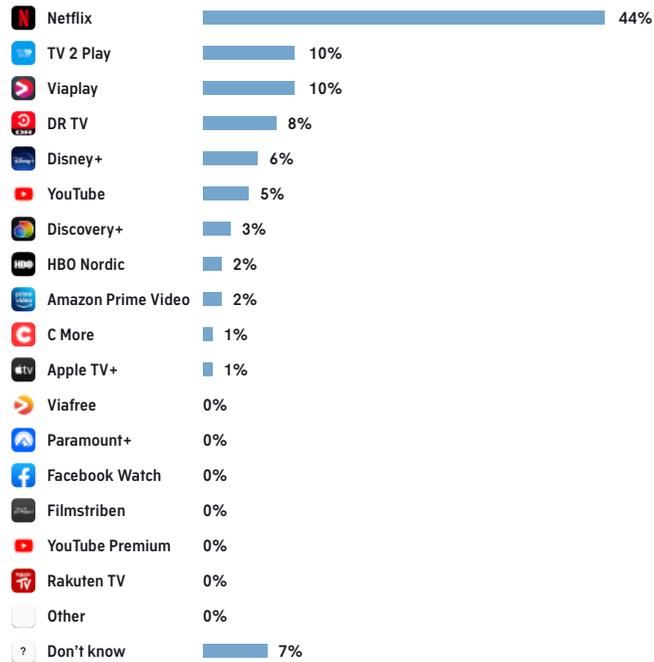
** Now HBO Max. Data collected before the launch of HBO Max in Denmark.

TV 2 Play and Viaplay are popular among the Danes, but Netflix is preferred

How many Danes prefer and subscribe to different streaming services to watch TV, series or movies?

Prefer the streaming service*

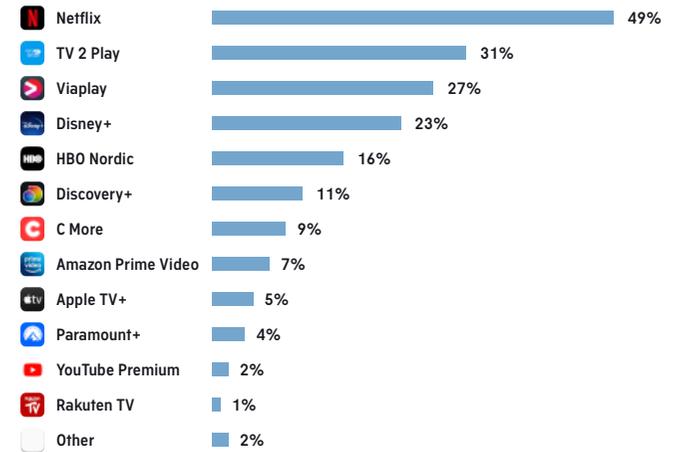
Sample: 633



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Subscribe to the streaming service**

Sample: 1,025



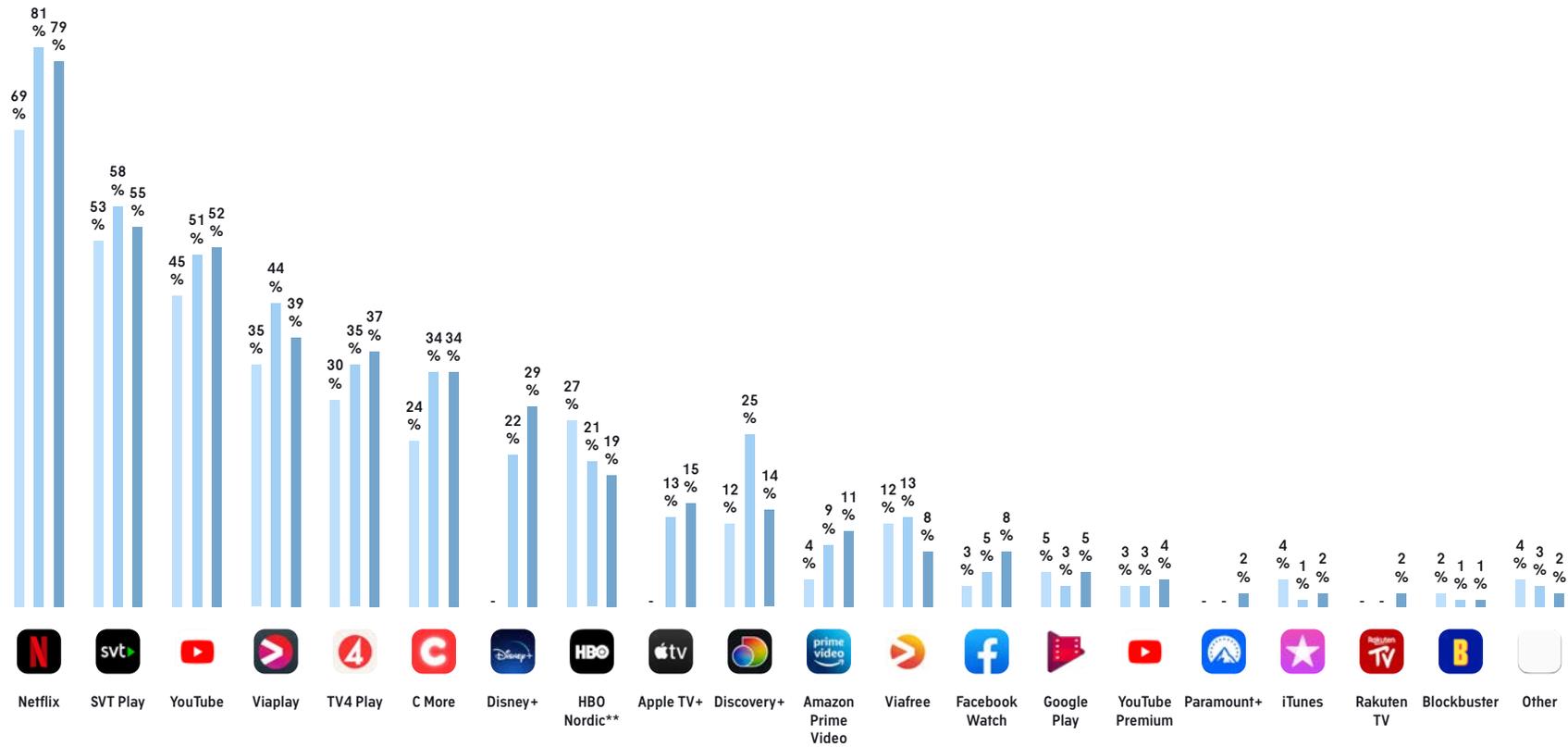
** The figures are based on the entire online population.

Local streaming services are popular in Sweden, but Netflix is still king

How many Swedes use different streaming and downloading services to watch TV, series or movies?*

2019
2020
2021

Sample: 755



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

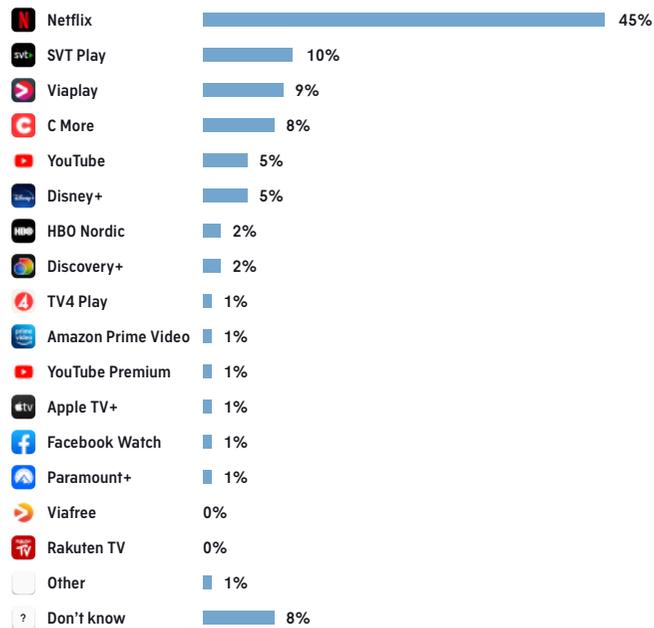
** Now HBO Max. Data collected before the launch of HBO Max in Sweden.

Almost half of the Swedish streamers prefer Netflix

How many Swedes prefer and subscribe to different streaming services to watch TV, series or movies?

Prefer the streaming service*

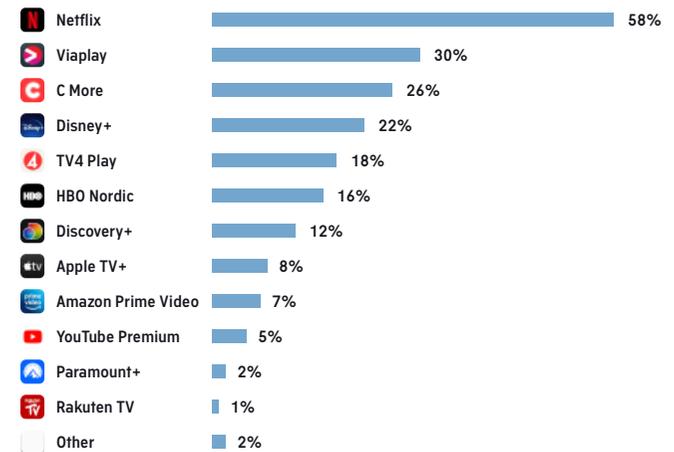
Sample: 755



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Subscribe to the streaming service**

Sample: 1,048



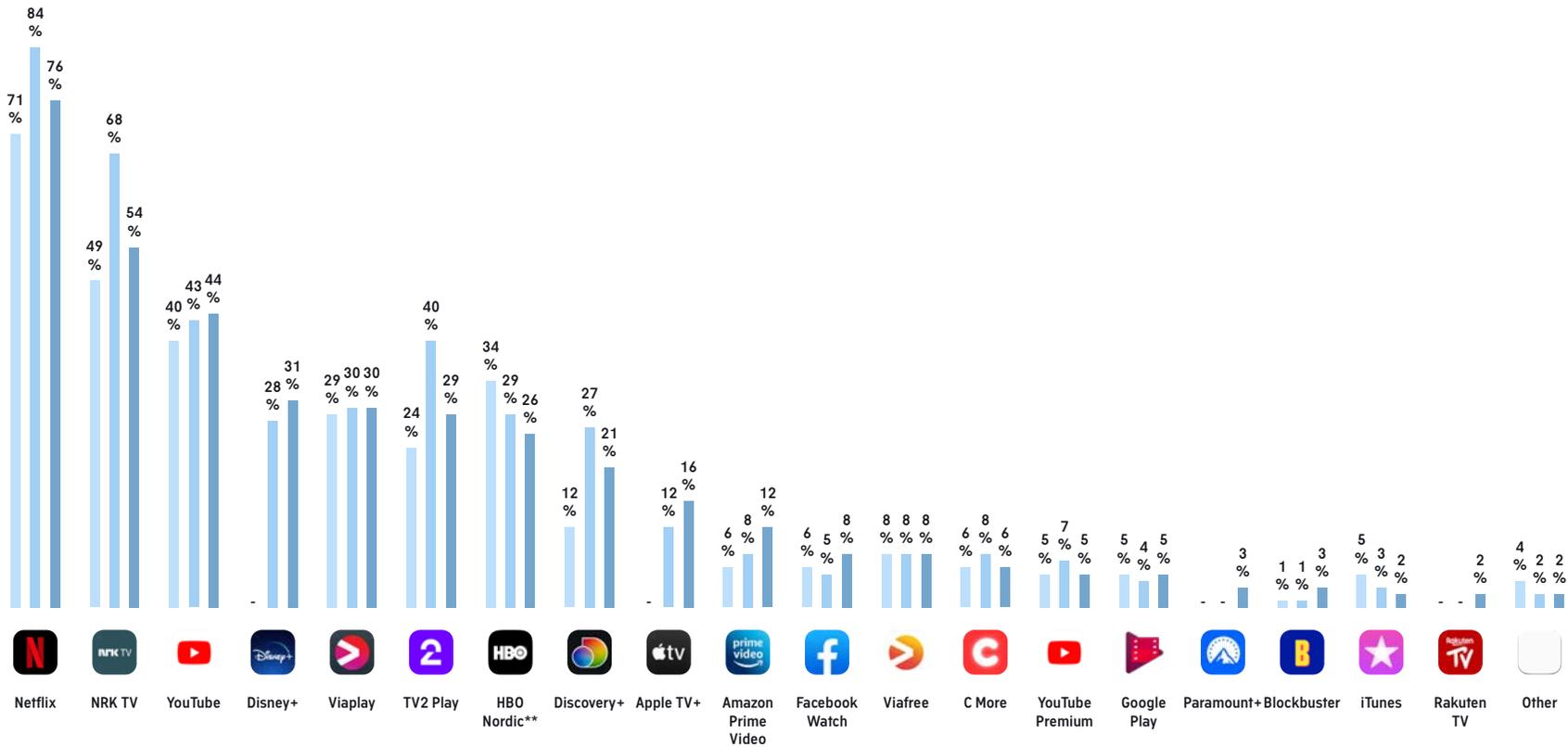
** The figures are based on the entire online population.

Despite a slight drop, Netflix is still on top in Norway

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

2019
2020
2021

Sample: 703



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

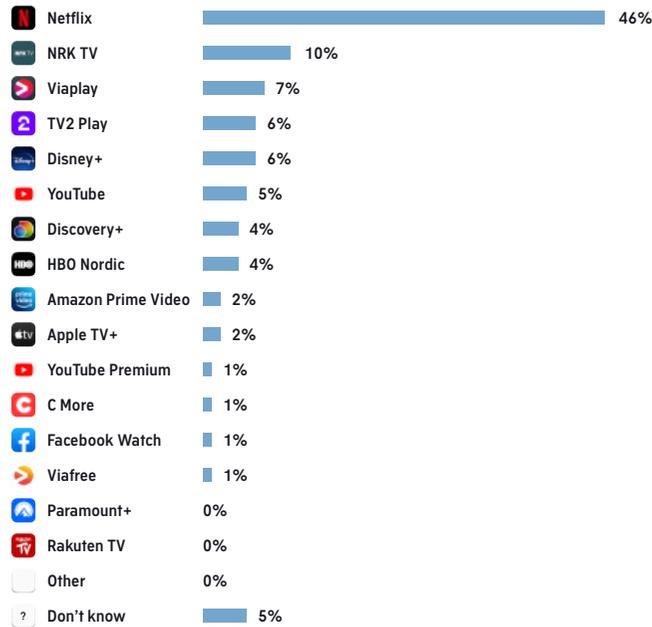
** Now HBO Max. Data collected before the launch of HBO Max in Norway.

Netflix is the streaming service with by far the most subscribers in Norway

How many Norwegians prefer and subscribe to different streaming services to watch TV, series or movies?

Prefer the streaming service*

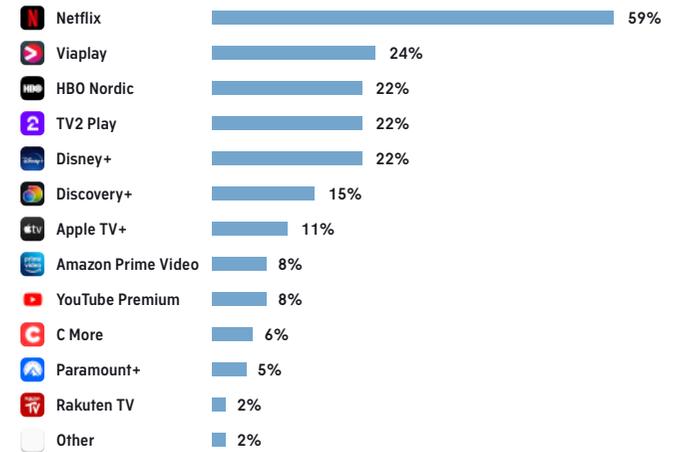
Sample: 703



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Subscribe to the streaming service**

Sample: 1,012



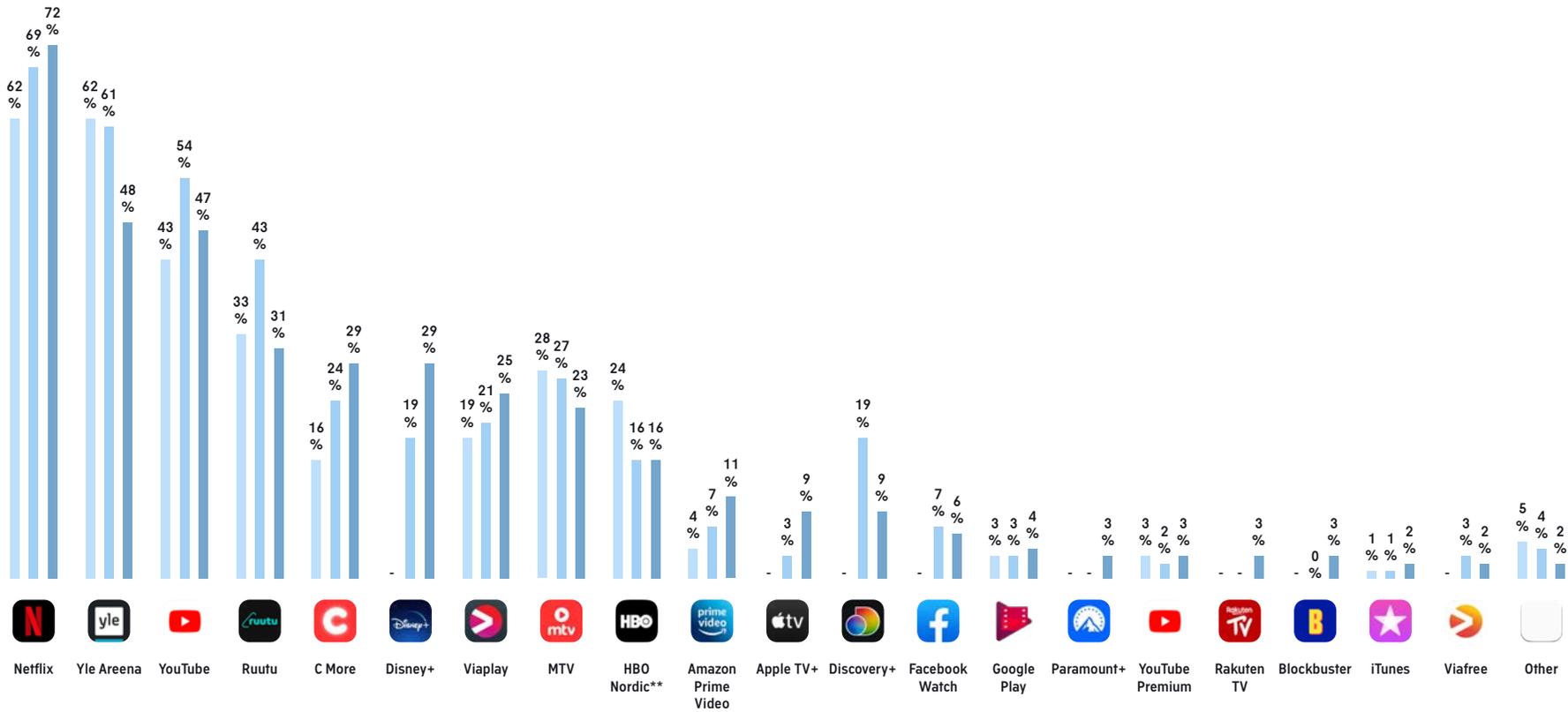
** The figures are based on the entire online population.

Netflix's dominant position has strengthened in Finland

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

Sample: 554

2019
2020
2021



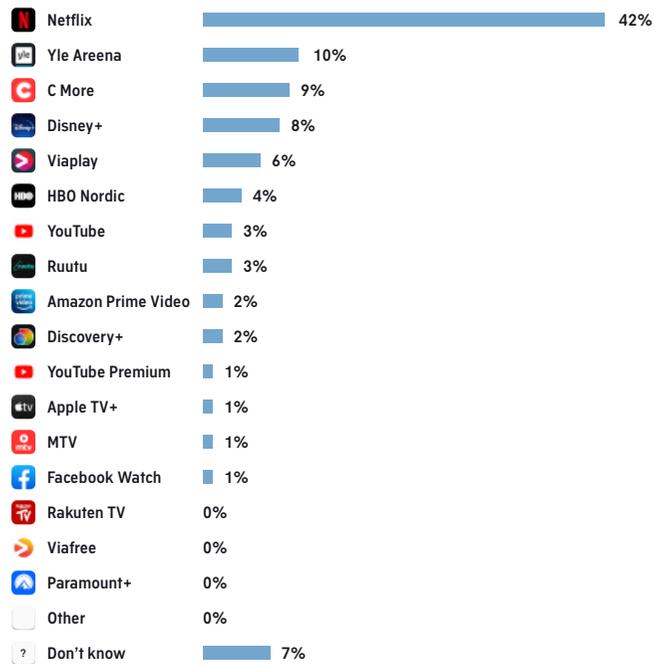
* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.
** Now HBO Max. Data collected before the launch of HBO Max in Finland.

Netflix has twice as many subscribers as its closest competitor in Finland

How many Finns prefer and subscribe to different streaming services to watch TV, series or movies?

Prefer the streaming service*

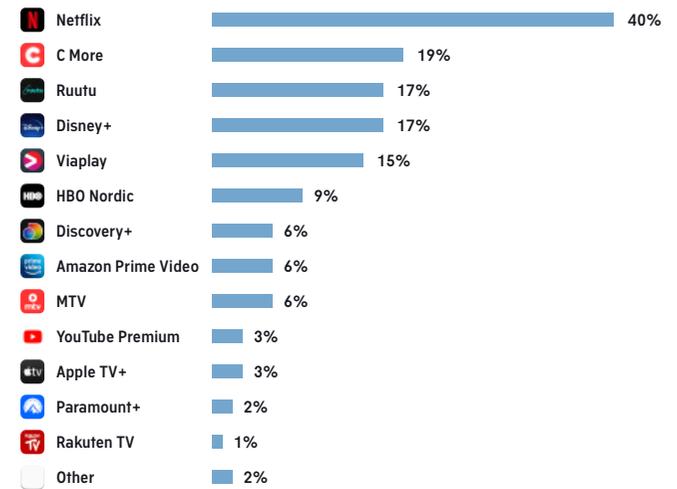
Sample: 554



* The figures are based on those who have used a streaming or downloading service to watch TV, series or movies within the last week.

Subscribe to the streaming service**

Sample: 1,033

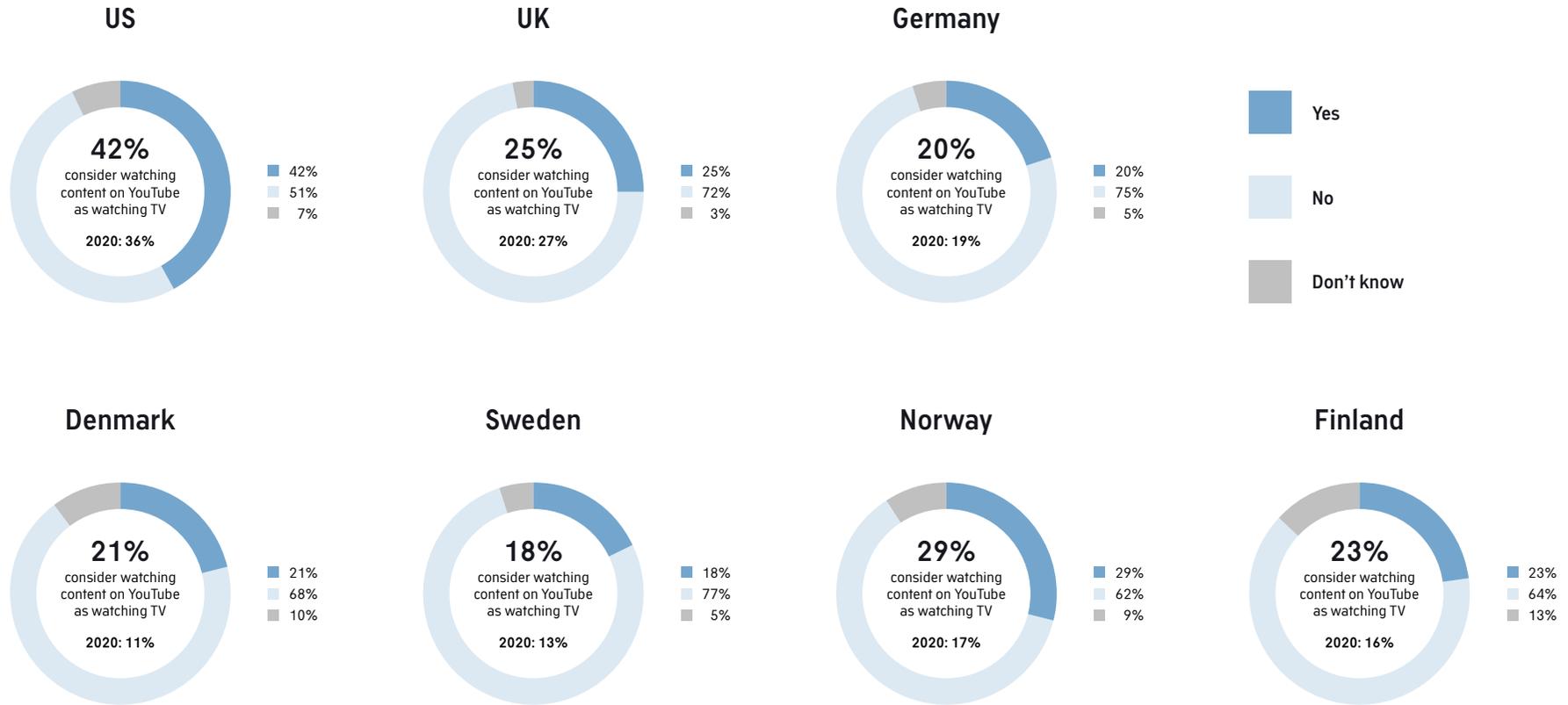


** The figures are based on the entire online population.

Almost half in the US consider watching content on YouTube as watching TV

How many consider watching content on YouTube as watching TV?

Sample: 7,271

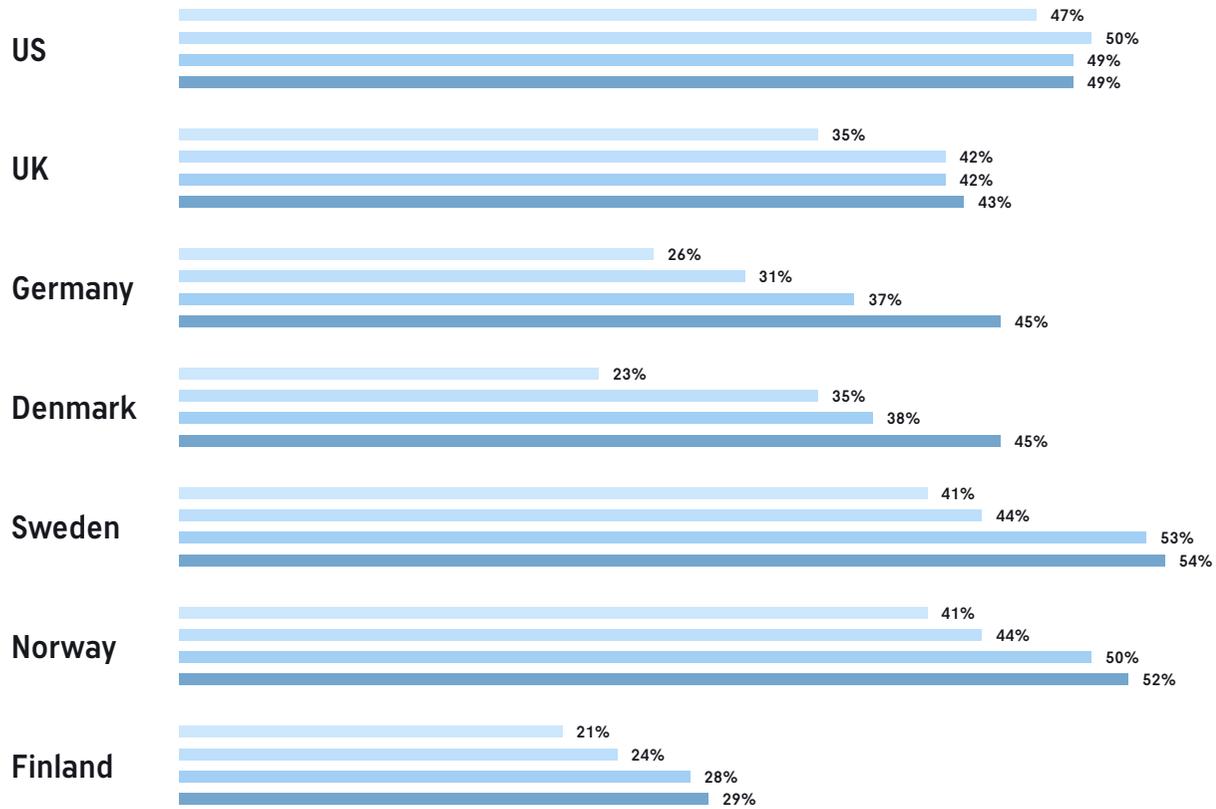


The use of CTV boxes increases in all countries

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

Sample: 7,271

- 2018
- 2019
- 2020
- 2021



ABOUT THE STUDY

Further insights

This is just the tip of the iceberg. AudienceProject has in-depth data on media consumption. Please reach out to us for more information on linear TV and streaming consumption or other topics.

Methodology

The study is a part of AudienceProject Insights 2022. Data is collected through online surveys done in Q4 2021. The respondents have been selected from our US, UK, German and Nordic panels and weighed to achieve representativity on the more than 7,000 respondents who completed the survey.

Text & Design

Martin Kokholm
mk@audienceproject.com
+45 25 61 32 19

Data

Kasper Ahlefeldt
ka@audienceproject.com
+45 53 56 11 91

Contact

hello@audienceproject.com

Website

www.audienceproject.com

Twitter

@Audience_P
#apinsights2022

About AudienceProject

AudienceProject is a technology-based market research company founded in Denmark and operational worldwide that helps advertisers get the most value from their advertising spend.

We provide an independent audience measurement platform with everything you need to create effective multichannel campaigns.

Measure, optimise and plan your campaigns with AudienceProject to reach and impact your audience cost-efficiently across channels, formats and devices.

AudienceProject >=