

The background features a dark blue field filled with glowing binary code (0s and 1s) in shades of cyan and blue. A large, semi-transparent sphere is positioned on the left side, and a bright, multi-colored light trail spirals from the bottom center towards the top right, creating a sense of digital motion and connectivity.

EBU

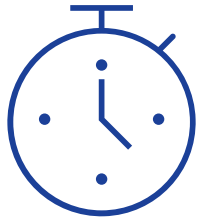
OPERATING EUROVISION AND EURORADIO

The Connected Viewer: Video Consumption in the Digital Age

THE FUTURE OF TV FOR EUROPE – ITU

**Léa Besson, Senior Media Analyst, Digital Lead
European Broadcasting Union**

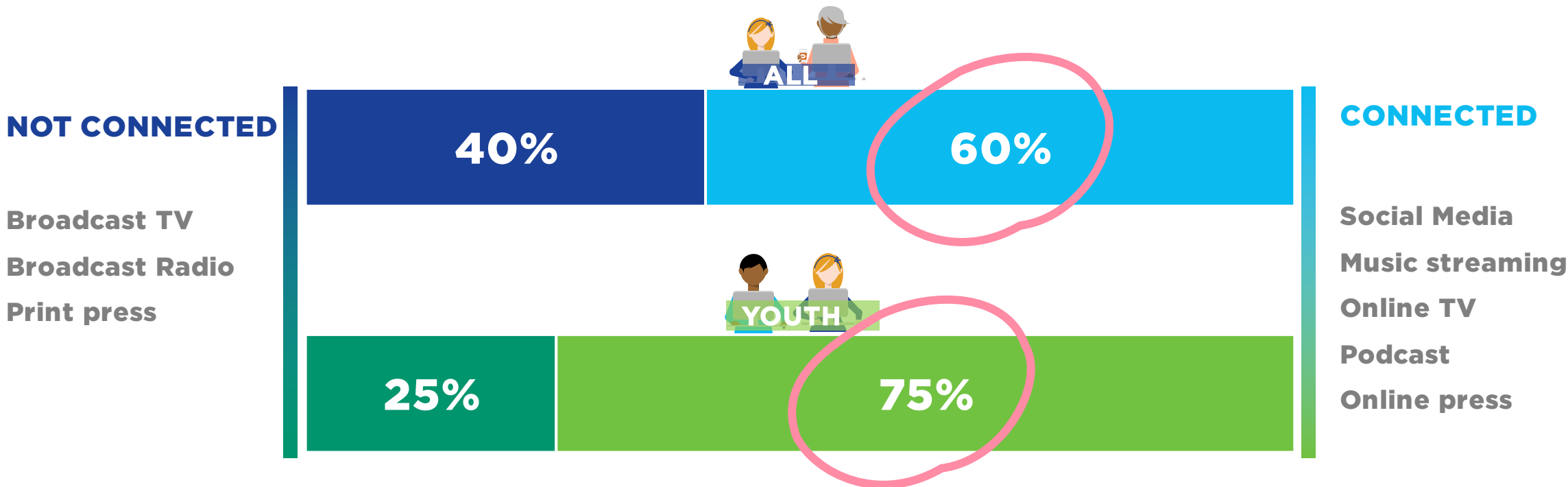
NOVEMBER 2024



MOST OF MEDIA TIME SPENT IS CONNECTED

Average daily time spent per media type (self reported)

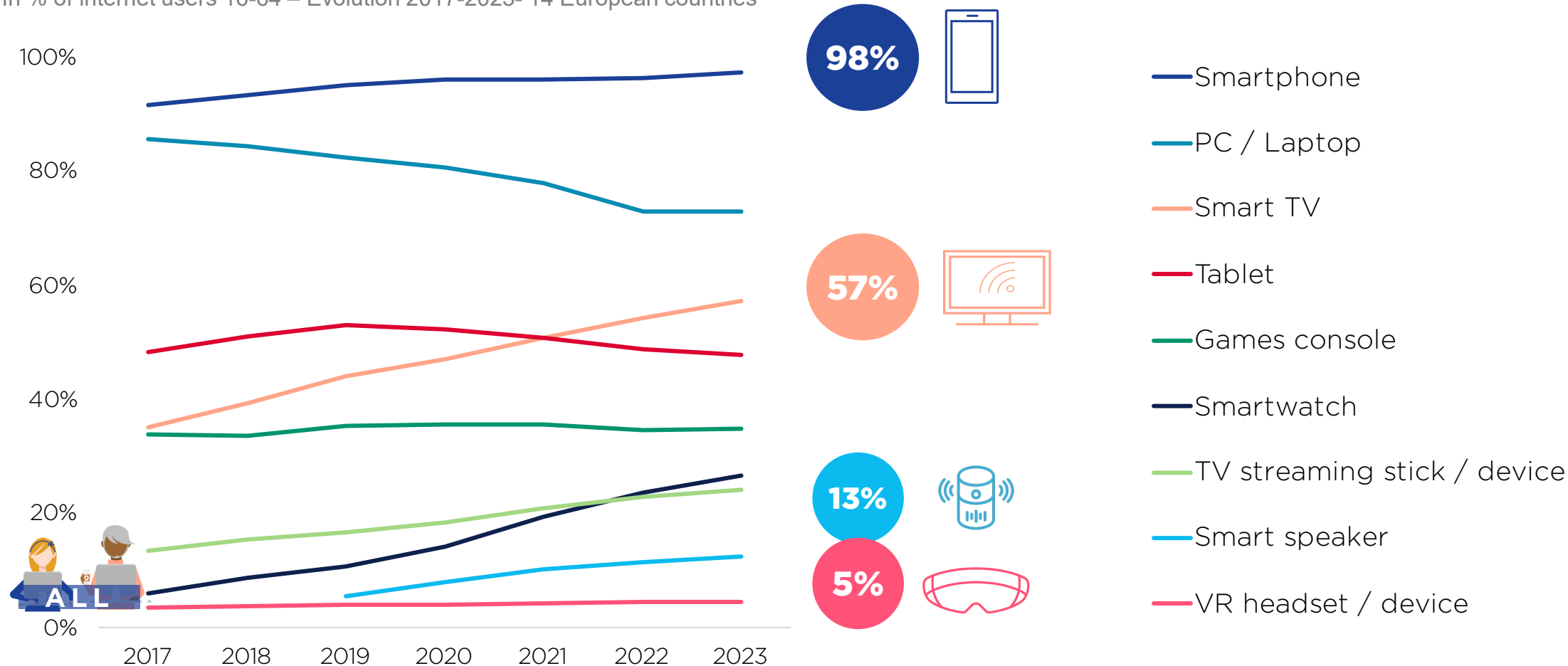
In % of internet users 16-64 and 16-24 –2023 - 14 European countries



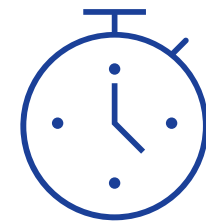
OWNERSHIP OF SMART DEVICES CONTINUE TO GROW

Evolution of connected devices ownership

In % of internet users 16-64 – Evolution 2017-2023- 14 European countries

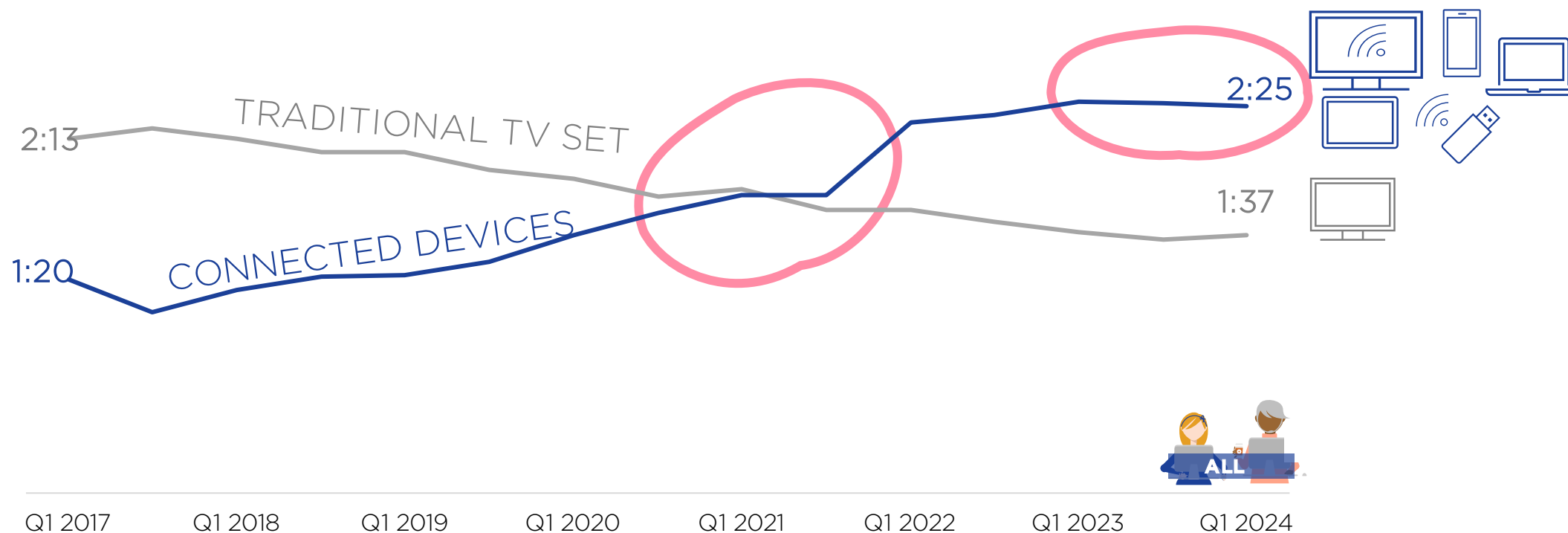


CONNECTED DEVICES: MANY OPPORTUNITIES FOR CONTENT VIEWING



Daily time spent watching content on devices (self-reported)

In hours and minutes for internet users 18-64 – Evolution Q1 2017-Q1 2024 – 9 European countries

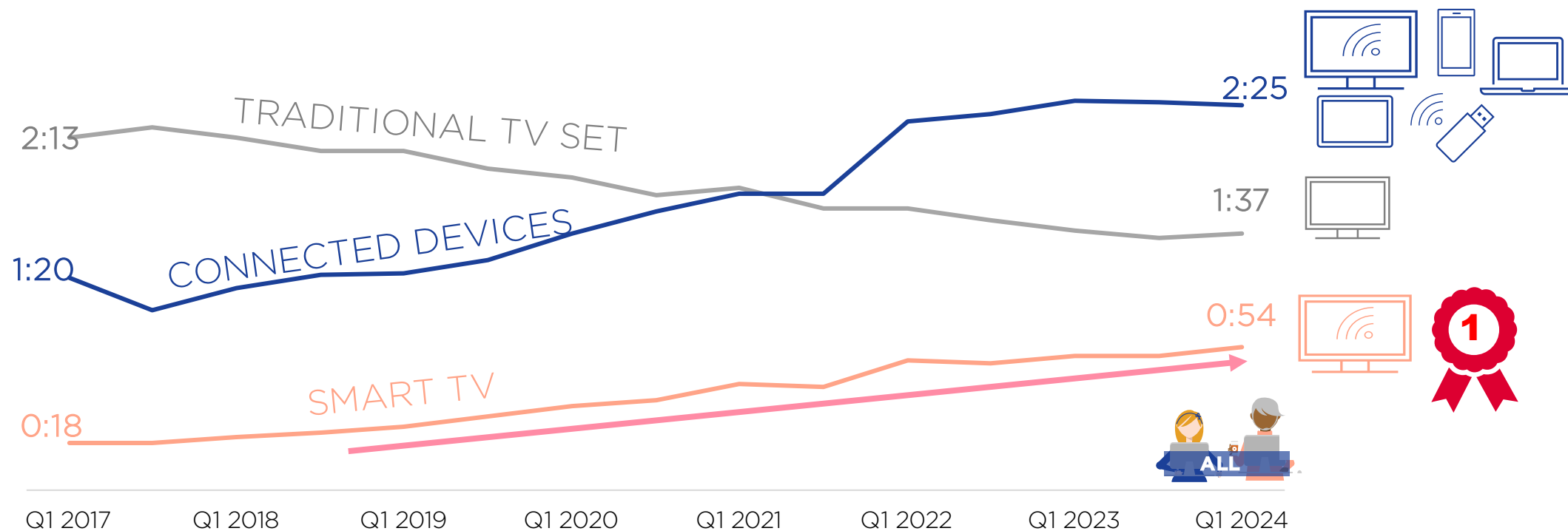


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PEOPLE CAN ACCESS MANY SERVICES

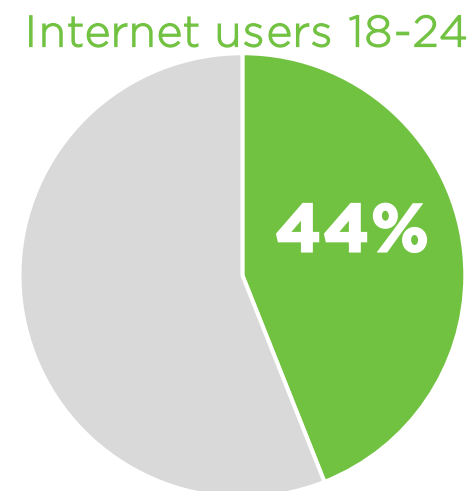
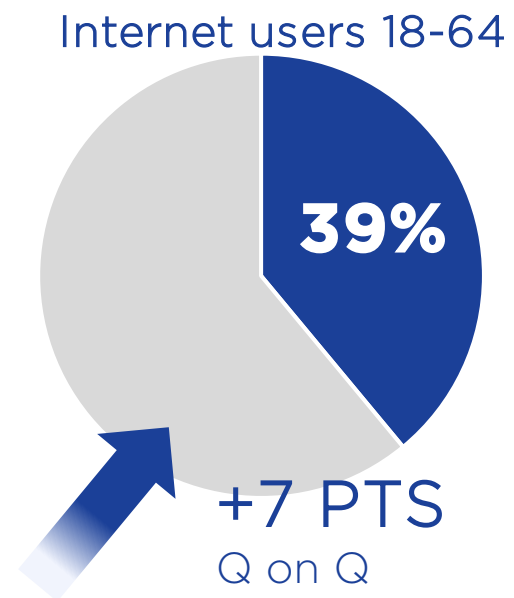


Source: EBU MIS based on Ampere Media Consumer Survey, Q1 2024 – 14 Countries: Czechia, Denmark, France, Finland, Germany, Italy, Netherlands, Norway, Poland, Romania, Spain, Sweden, Türkiye, UK

...AND IT CAN BE OVERWHELMING

Agreement with “I feel overwhelmed by the number of online services I have access to”

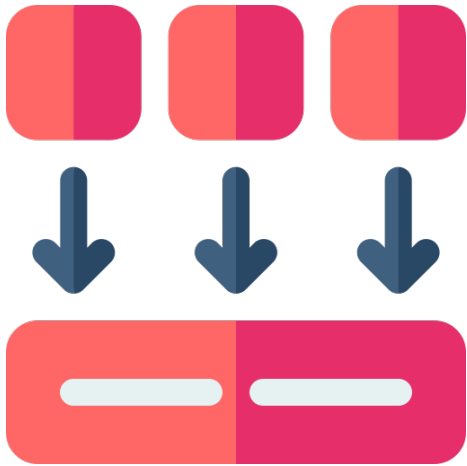
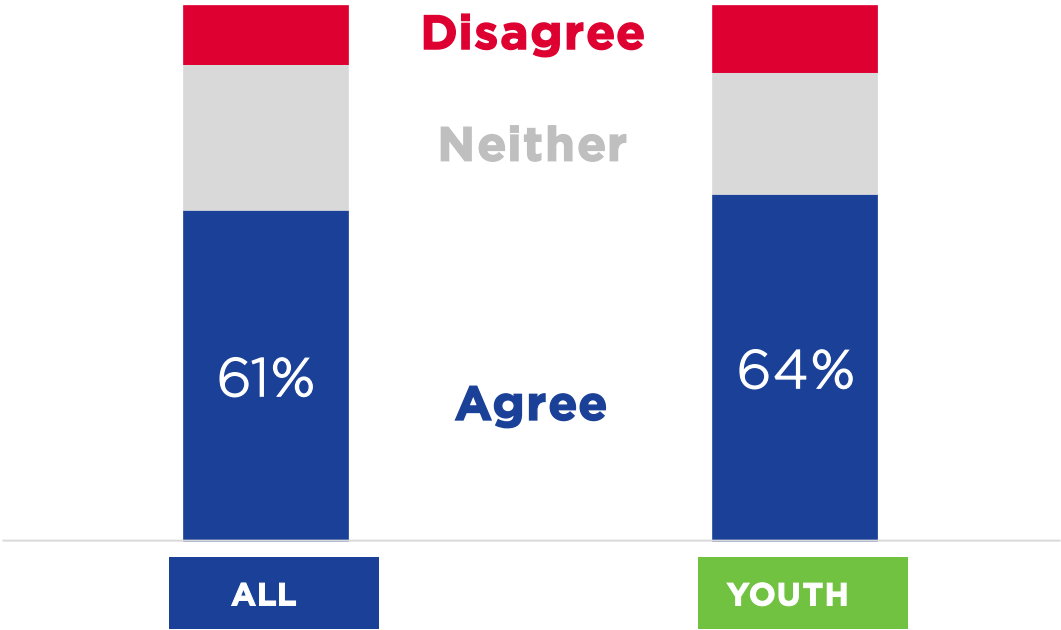
In % of internet users – 14 European countries – Q1 2024



VIEWERS NEED ONE UNIFIED SEARCH TO HELP THEM IN THEIR CHOICE OF CONTENT

Agreement with “I want to be able to search in one location for all the TV shows and movies across all the different TV services I have access to”

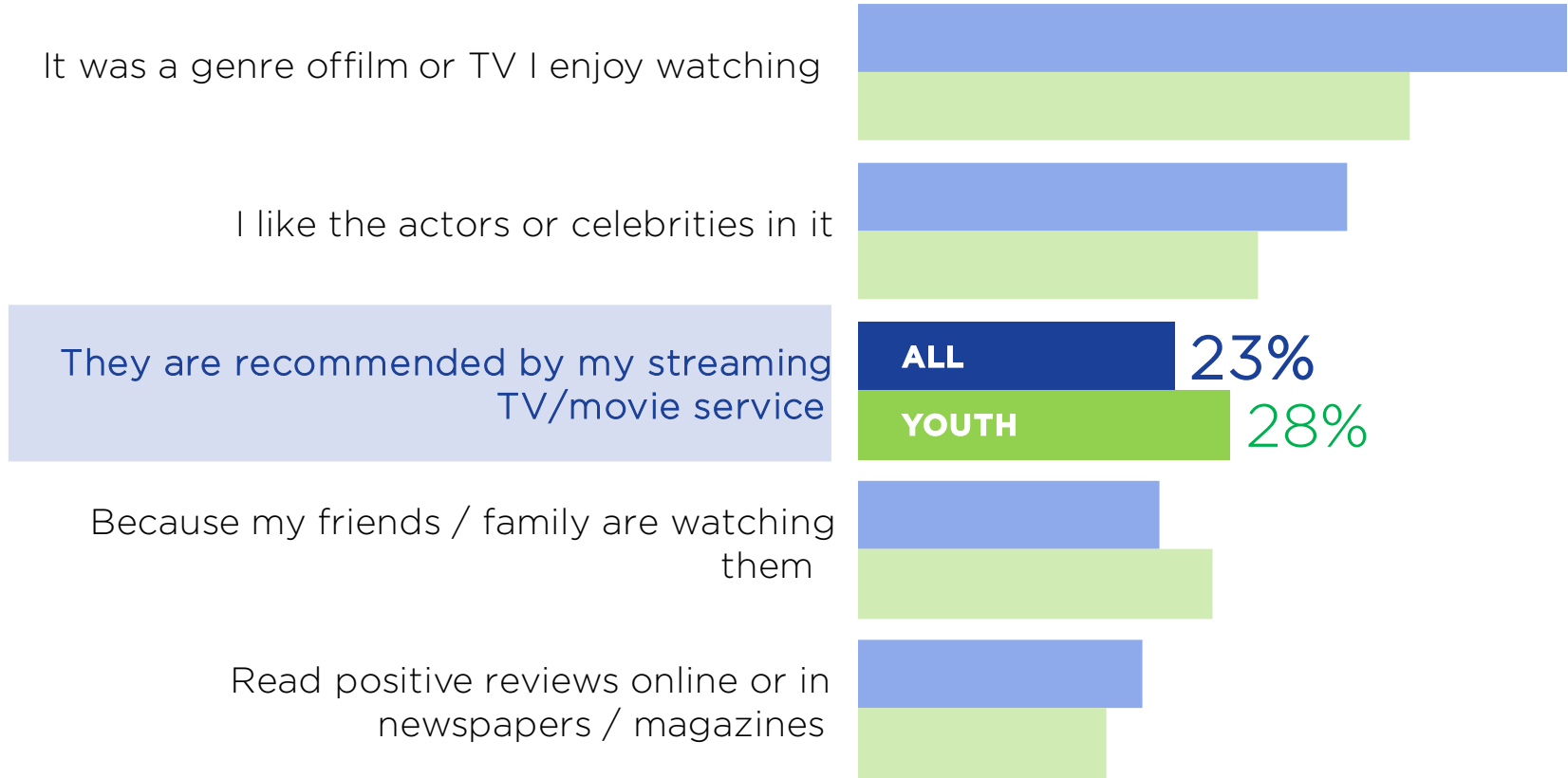
In % of internet users 18-64 and 18-24 – 14 European countries – Q1 2024



RECOMMENDATIONS FROM ONLINE SERVICES ARE THE THIRD DRIVER OF CONTENT VIEWING OVERALL

Main drivers for content viewing overall

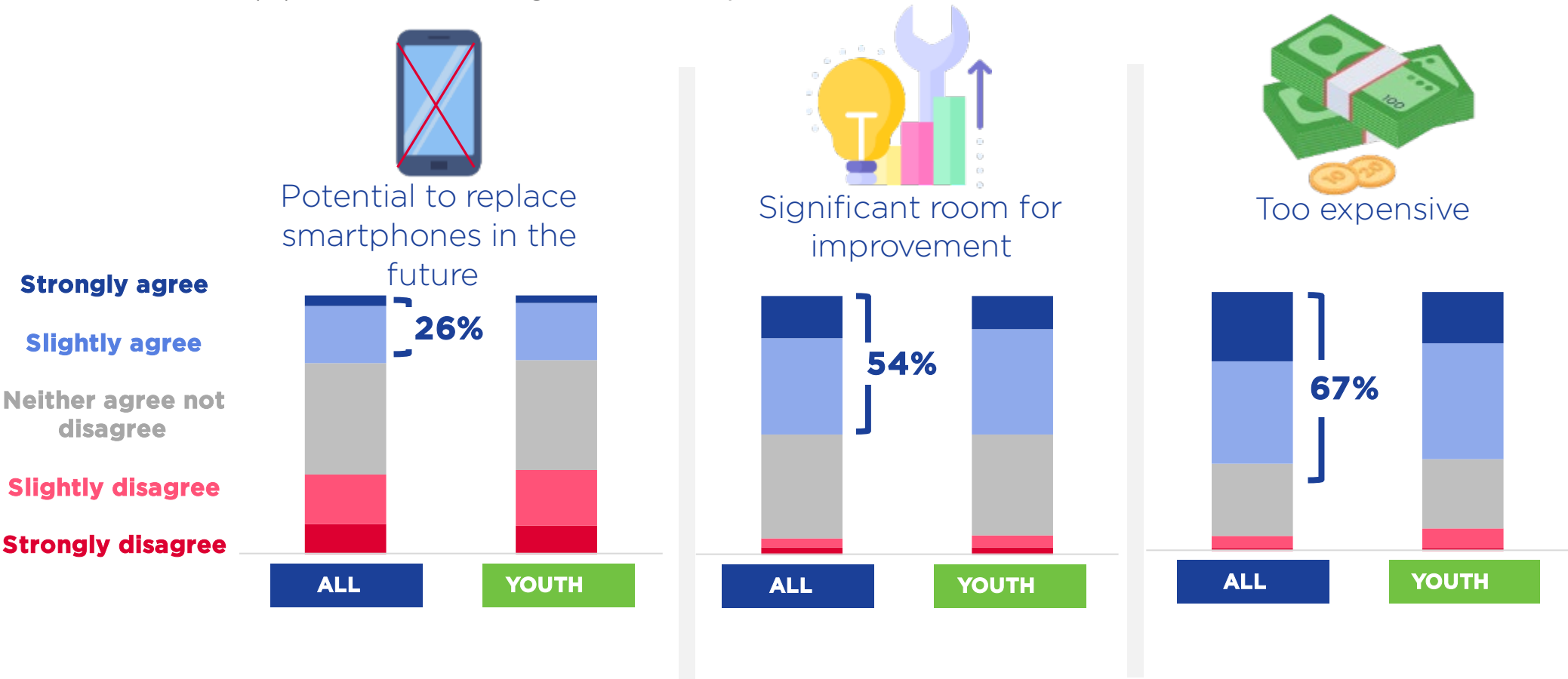
In % of internet users 18-64 and 18-24 – 12 European countries - 2023



PEOPLE ARE DUBIOUS ABOUT VR/AR TECHNOLOGY

Thoughts on VR/AR technology

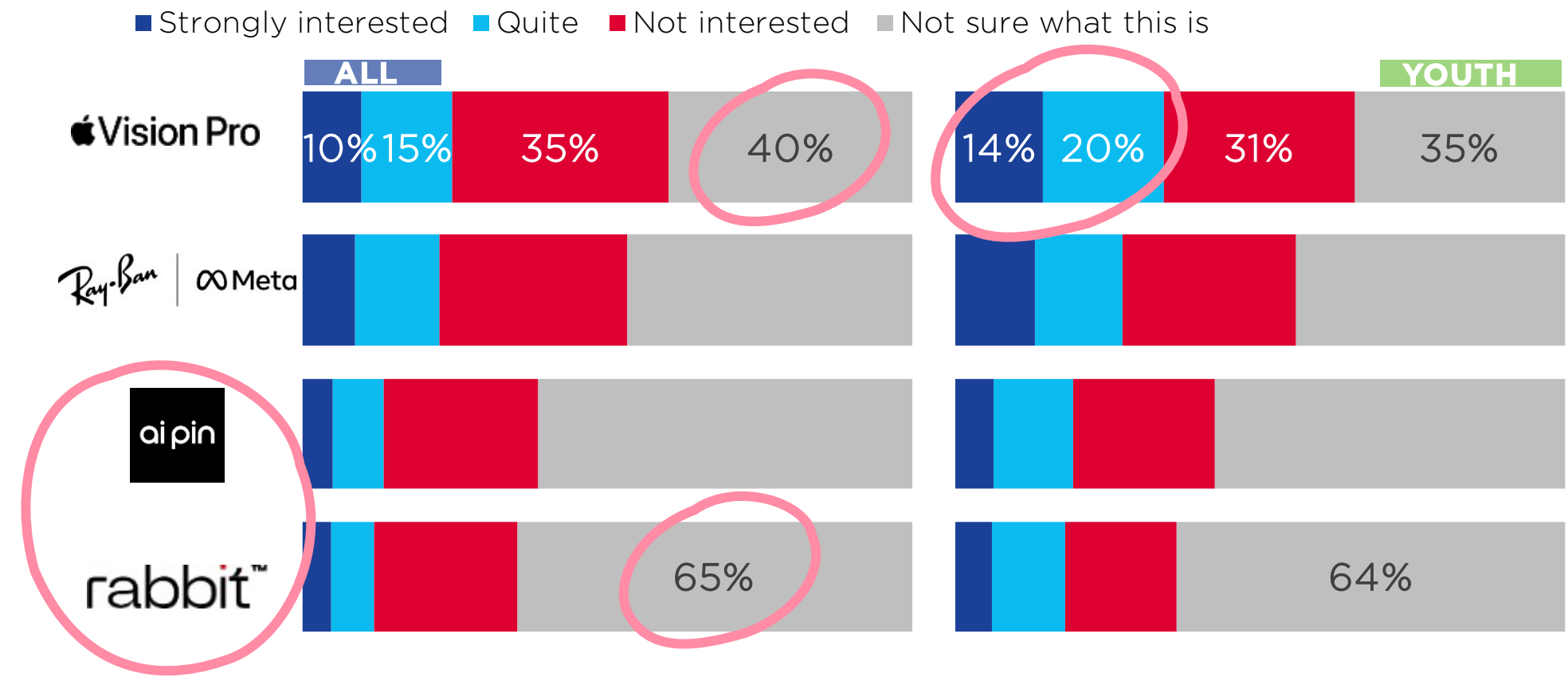
In % of internet users (IU) 16-64 and 16-24 – August 2023– 4 European countries



INTEREST IN SMART WEARABLES IS MODERATE...FOR NOW

Interest in new devices for future usage

In % of internet users (IU) 16-64 and 16-24 – February 2024 – 4 European countries



KEY TAKE-AWAYS

- 1. Online media are part of people's lives**
- 2. People are overwhelmed by the number of services they have access to**
- 3. Bundling and recommendations will have an increasingly key role in content discovery**
- 4. Big tech is already looking for the next go-to device**

MEDIA INTELLIGENCE SERVICE

Providing reliable market data, trustworthy analysis and relevant arguments

Thank you!

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www.ebu.ch/mis

