

TV Streaming Report 2022

Austria

Dear Sir or Madam

How have the TV viewing habits of Austrian Internet users evolved during the second year of the COVID-19 pandemic? What changes have occurred in the way TV programs are watched on the Internet? TV streaming provider Zattoo examines these and other questions in this year's TV Streaming Report 2022. The results for Austria show that the Internet continues to catch up with satellite reception as a TV reception channel, and that more and more Austrians are able to imagine watching TV exclusively via the Internet in the future.

The report is based on an online representative survey conducted by the market research company Kantar on behalf of Zattoo at the beginning of 2022 covering an online panel of 1,000 Austrian Internet users between the ages of 16 and 69. This is the second year in a row that Kantar and Zattoo have jointly carried out this survey. The report helps to identify the current trends in Internet and TV usage, as well as the TV streaming market. For Zattoo, the purpose of the report is to provide a discussion document about the significance of TV streaming. This year, the following trends can be identified for Austria:

The Internet as a TV reception method is increasingly catching up with reception via satellite

More than one in three Austrian Internet users (37 percent) already receives television via the Internet. This includes both IPTV services and TV streaming apps. Apart from reception via satellite, cable and DVB-T, all of which will decline this year, the Internet will remain the only TV reception channel in 2022 with stable figures for the previous year. Reception via satellite in particular will lose ground compared to 2021, losing five percentage points year-on-year to arrive at 43 percent. This means that the Internet is increasingly catching up with satellite reception. TV reception via cable also loses two percentage points, landing in third place with 31 percent. This is followed by reception via DVB-T, which also loses one percentage point, dropping to 7 percent.

Of all TV and video services, only live TV is used more than in 2021

25 percent of Internet users watched live TV via the Internet during the second year of the COVID-19 pandemic. This is three percentage points more than in the previous year. In comparison, all other TV and video services on the Internet are losing ground.

The broadcasters' media libraries are being used by 47 percent of online users in Austria this year, down four percentage points on the previous year. Looking at the individual platforms, ARD, Sat.1 and arte in particular, each gain four percentage points in their share of media library users. The absolute leader, however, is and remains ORF TVthek. 83 percent of media library users watch programming on the ORF platform.

YouTube usage also drops from 69 percent in 2021 to 66 percent in 2022. However, it is still the TV and video delivery platform which is used the most by Austrian Internet users.

Video-on-demand services also lose two percentage points compared to the previous year and are being used by 29 percent of Internet users in 2022. In terms of the individual providers, Netflix especially makes a big gain of seven percentage points in Austria, but at 73 percent is still behind its competitor Amazon Prime Video. The latter remains almost at the previous year's level at 76 percent, which is one percentage point less than in 2021. Disney+ is the clear winner among the video-on-demand providers and will make the biggest jump in its share this year from 20 percent in 2021 to 33 percent in 2022.

For the first time this year, the survey also asked about the use of video content offered via social media. These came in at 20 percent in the first year of the survey.

Growth in the use of Smart TVs

74 percent of Internet users who watch TV at least once a week already use TV streaming services. In answer to the question of which devices are used the most for TV streaming, smart TVs are in the lead this year, scoring the number one spot. More than every second TV streaming user (55 percent) watches on a smart TV. This is four percentage points more than in the previous year. By contrast, usage on all other device categories is stagnating or falling this year. While PCs and laptops were still on a par with smart TVs in 2021, they will only account for 46 percent this year, five percentage points less than last year. Smartphones are also losing five percentage points and take third place with 32 percent. This is followed by tablets with 26 percent, then streaming devices with 18 percent and game consoles with 6 percent.

More and more Austrians can imagine using TV services exclusively via the Internet

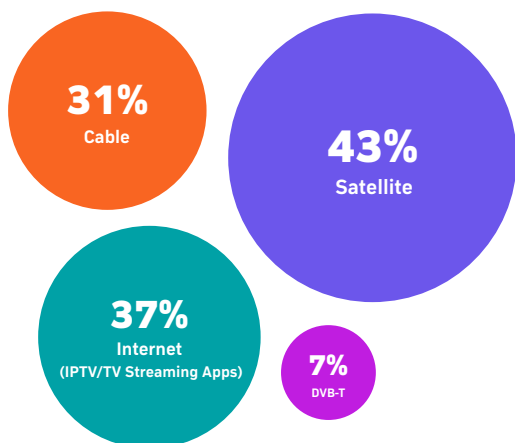
When asked whether Austrian Internet users can imagine using TV offerings exclusively via the Internet in the future, more than half (53 percent) already say they can imagine this as (very) likely to happen. This is three percentage points more than in the previous year. The number of people who already use TV services exclusively via the Internet also increased by two percentage points to 5 percent in 2022. At the same time, the number of those who cannot imagine doing this has fallen further compared to 2021 and is now only 19 percent.

Best regards,



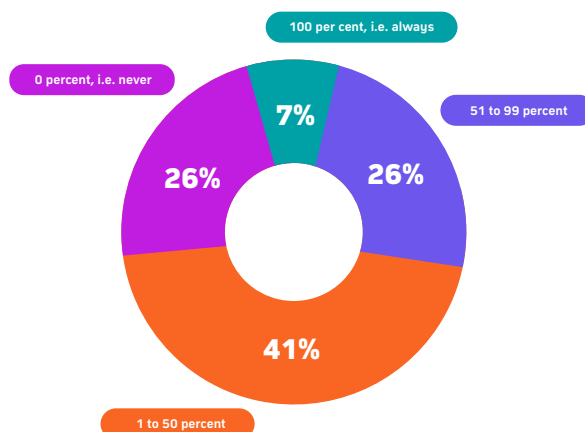
Jörg Meyer
Chief Commercial Officer at Zattoo

1 How do you receive TV in your household?



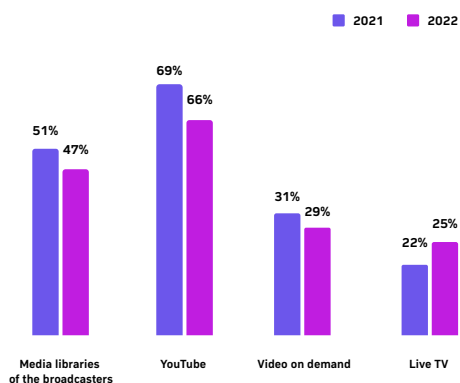
Basis unweighted: 1000
Multiple answers possible

2 How much of your TV viewing time do you use TV streaming services?



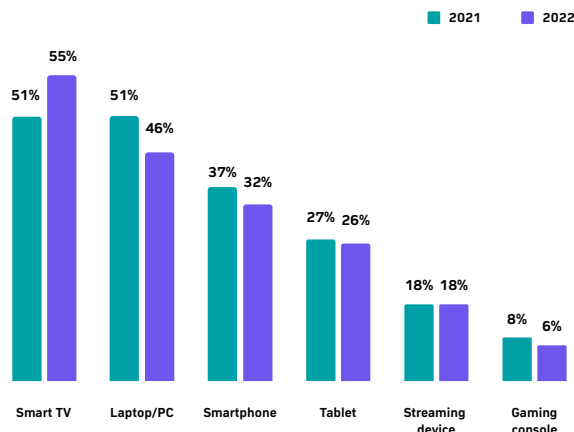
Basis: TV viewers at least 1 day per week
Basis unweighted: 884

3 Which television or video offerings do you use on the internet?



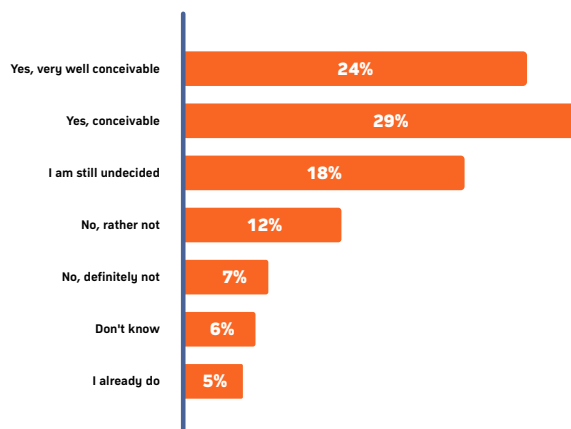
2022 Basis: Total*
2021 Basis: Users of at least 1% TV streaming services
2022 Basis unweighted: 1000
2021 Basis unweighted: 690
Multiple answers possible
*Other basis due to changed query

4 On which devices do you watch TV via the internet?



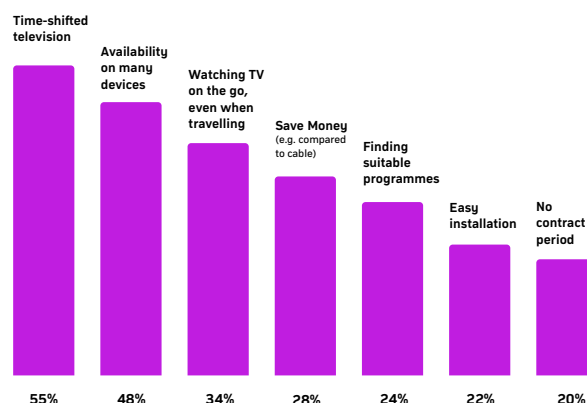
Basis: Users of at least 1% TV streaming services
2022 Basis unweighted: 655
2021 Basis unweighted: 690
Multiple answers possible

5 Can you imagine using your TV service exclusively via the Internet in the future?



Basis unweighted: 1000

6 What are the most important advantages of TV streaming?



Basis: Users of at least 1% TV streaming services
Basis unweighted: 655
Multiple answers possible