

TV Streaming Report 2024

Austria

Dear Sir/Madam,

In 2024, the ongoing economic uncertainty and changes in the media landscape will be reflected in Austrians' TV viewing habits. More and more people are turning to the Internet to watch TV, while the use of satellite and cable TV continues to decline. TV is increasingly being watched via the Internet on smart TVs and thus on the big screen, which shows that Internet TV is now a comprehensive alternative to traditional reception modes. Zattoo's TV Streaming Report this year reveals these and other findings.

The report is based on an online survey conducted by YouGov, in which 1102 people in Austria took part between 15 January 2024 and 22 January 2024. The results were weighted and are representative of the Austrian population aged 16 and over. Zattoo has been conducting this survey in Austria every year since 2021. The TV Streaming Report helps identify current developments in Internet and television usage as well as TV streaming. In this way, Zattoo aims to contribute to the discussion on the importance of TV streaming. This year, the following trends can be discerned for Austria:

Internet TV continues to grow, whereas satellite and cable TV lose significant ground

The trend towards television via the Internet will continue in 2024. When asked which reception channel they use to watch TV (multiple answers possible), 41 percent of respondents chose the Internet as their TV reception channel of choice. This is another 3 percentage points more than in 2023. TV reception via satellite, on the other hand, will decline significantly this year. Only around one in three (33%) watch cable TV, which is 10 percentage points less than in the previous year. TV reception via cable also lost 3 percentage points this year and is only used by 26 percent of respondents.

The use of live TV remains at a constant level. The use of media libraries continues to fall

The use of live TV will remain stable in 2024 too. One in four (24%) continues to follow linear TV programs, therefore maintaining the previous year's level. In contrast, media libraries are continuing their downward trend. At present, only 31 percent of viewers use the media library offers, which corresponds to a significant decline of 13 percentage points compared to the previous year. Since 2021, TV stations' media libraries have been used almost 40 percent less. The use of video-on-demand services is also declining, which fell by 8 percentage points to 21 percent this year.

TV streaming still preferred on the big screen

More than two-thirds (67%) use TV streaming services during their TV viewing time – and are most likely to do so on a smart TV. More than half (52%) of TV streaming users watch TV programs on a smart TV. In contrast, the use of PCs and laptops recorded a further decline: in 2023, 40 percent of respondents used laptops or PCs for streaming, compared with only 34 percent this year. On the other hand, the use of mobile phones is relatively stable, with a slight decrease in the use of tablets of 5 percentage points to 20 percent, while streaming on smartphones is on an upward trend, increasing by 3 percentage points to 35 percent.

The economic situation continues to influence streaming subscriptions

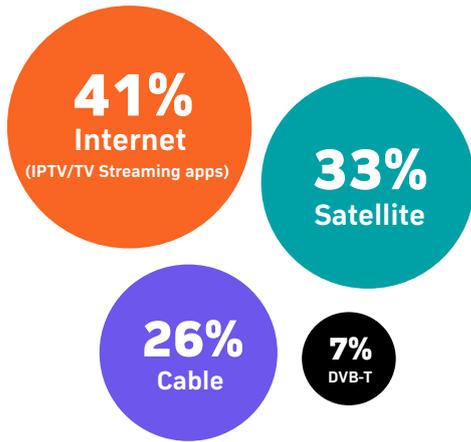
The persistently tense economic situation is also having an increasing impact on the streaming behavior of those surveyed. This is why last year, one in five (20%) canceled a streaming subscription – a significant increase of 7 percentage points compared to the previous year. Of these, more than a third (38%) switched to cheaper streaming services, while 29 percent chose free options. On the other hand, another third (30%) opted out of alternative services altogether. This development highlights consumers' growing need for a good price-performance ratio, also with domestic TV and streaming services, especially in times of economic uncertainty.

Best regards,

A handwritten signature in black ink, appearing to read "Jörg Meyer".

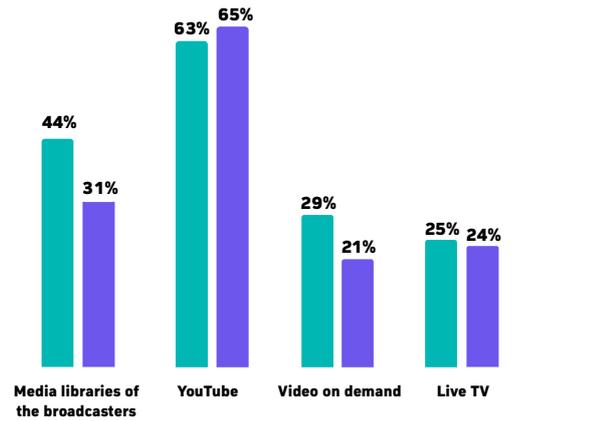
Jörg Meyer
Chief Commercial Officer

1 How do you receive TV in your household?



Basis: Total
Basis unweighted: 1102
Multiple answers possible

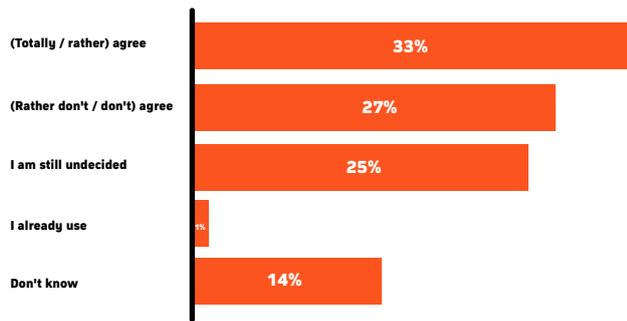
2 Which television or video offerings do you use on the internet?



2024 Basis unweighted: 1102
2023 Basis unweighted: 1016
Multiple answers possible

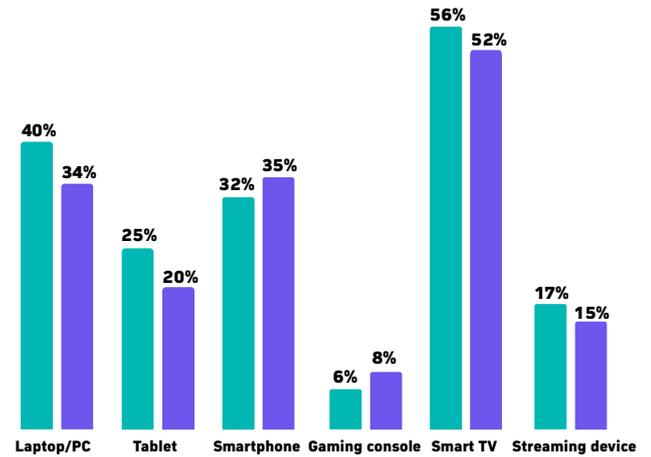
■ 2023 ■ 2024

3 Can you imagine watching so-called FAST channels in the future?



Basis: Total
Basis unweighted: 1102

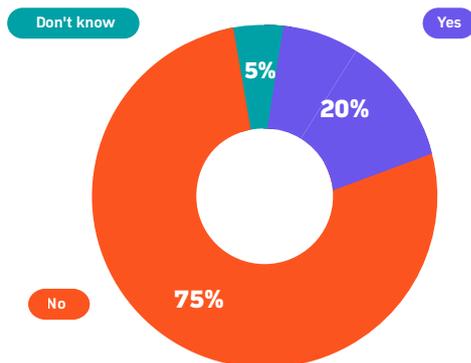
4 On which devices do you watch TV via the internet?



Basis: Respondents who watch TV via the internet
2024 Basis unweighted: 760
2023 Basis unweighted: 700
Multiple answers possible

■ 2023 ■ 2024

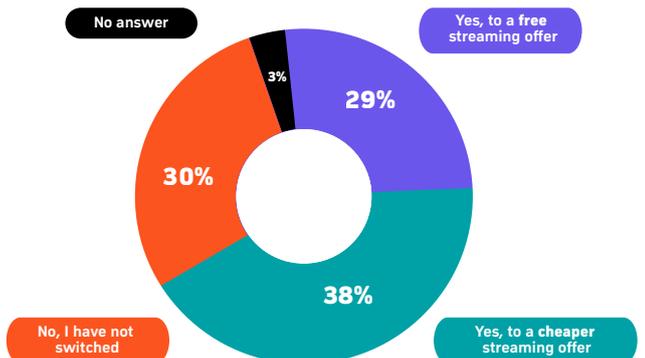
5 Have you already cancelled a streaming subscription due to the current economic situation?



Basis: Total
Basis unweighted: 1102

Source: YouGov

6 Have you switched to cheaper or free offers due to the current economic situation?



Basis: Respondents who have cancelled a streaming subscription
Basis unweighted: 221