

# TV-Streaming-Report 2023

## Austria

Dear Sir/Madam,

This year, the COVID-19 pandemic is slowly receding into the background. The difficult economic situation and high inflation are issues that many consumers are currently faced with. Whether this is having an impact on the television behaviour of Austrian Internet users is highlighted by the TV streaming provider Zattoo in this year's 2023 TV Streaming Report. The results for Austria show that the Internet as a TV reception channel is further ahead of cable reception, and that inflation is having a smaller effect on streaming subscriptions than expected.

This report is based on an online representative survey conducted by the market research company Kantar on behalf of Zattoo among 1,016 Austrian Internet users between the ages of 16 and 69 in an online panel at the beginning of 2023. Kantar and Zattoo have been carrying out this survey annually in Austria for three years now. This report helps to identify current developments in Internet and TV use, as well as in the field of TV streaming. Zattoo wants to contribute to the discussion about the importance of TV streaming. This year, the following trends can be discerned for Austria:

### **Inflation has less impact on streaming subscriptions than expected**

Many experts had assumed that the high inflation would have a negative impact on household media budgets. In a 2022 KPMG study from the US, for example, around 80% of consumers with a streaming subscription stated that inflation was affecting their budget in general or their subscription in particular. A study conducted by Recurly in Germany in 2022 also showed that 84% of German consumers who use one or more subscription services were concerned about the effects of inflation. The present TV streaming report concludes that, so far, around one in eight Internet users (13%) in Austria has cancelled a streaming subscription due to the economic situation. The report also shows that, with a view to inflation, 9% have switched to at least one cheaper streaming offer and another 8% have switched to a free offer.

### **The Internet remains ahead of cable television as a TV reception channel**

More than one in three Austrian Internet users (38%) already receives television over the Internet. At just one percentage point more, the Internet remains at the previous year's level, but continues to expand its lead over cable TV reception in 2023 as well. This is a 2 percentage point loss, hitting 29% this year. TV reception via satellite remains in first place in Austria, at 43%, thus staying at the previous year's level. Reception via DVB-T remains low at 6%.

### **TV streaming services are being used more and more**

This year, as many as 40% of respondents say they watch content from TV streaming services during at least half of their television time. This corresponds to an increase of around 20% compared to the previous year. 7% of respondents even use only TV streaming services during their television time. Among the onliners, when asked as to whether they can imagine using television services exclusively over the Internet in the future, about half of the respondents (47%) say they can (very) well imagine this.

### **TV and video usage remains at the previous year's level**

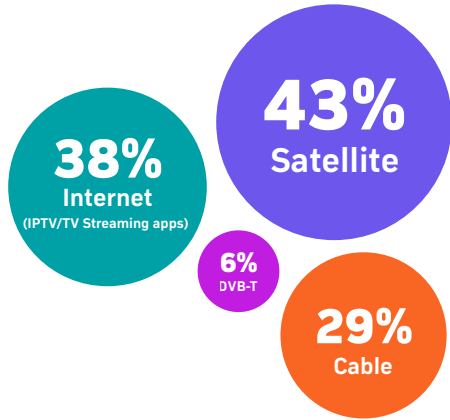
After a slight increase in the use of live TV in 2022, it remains stable this year at 25%. YouTube is and remains the most popular moving image offer on the Internet, despite a loss of 3 percentage points compared to the previous year. About two thirds (63%) use the video portal. At 44%, the broadcasters' media libraries have also seen a decrease of 3 percentage points in 2023. Like live TV, video-on-demand offers remained at the previous year's level at 29%. This year, with 73% of video-on-demand users, Netflix is just ahead of Amazon Prime Video on 72%. This is followed by Disney+ with 37%. The US service has thus seen an increase of 4 percentage points. The Paramount+ service, which was launched in 2022, currently reaches 8% of video-on-demand users. The likewise new offering from Discovery+ comes in at 6%.

Best regards,



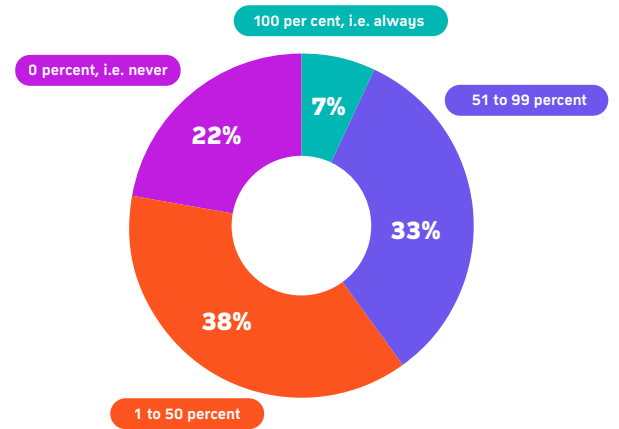
**Jörg Meyer**  
Chief Commercial Officer at Zattoo

# 1 How do you receive TV in your household?



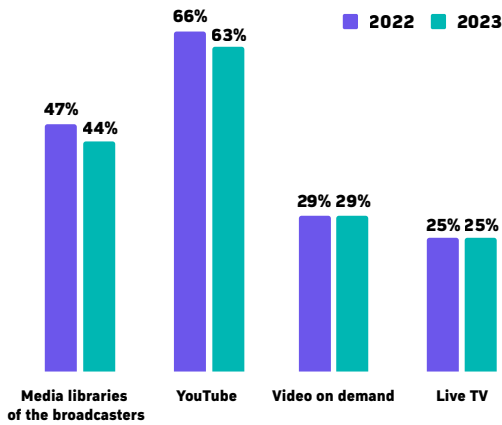
Basis unweighted: 1016  
Multiple answers possible

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



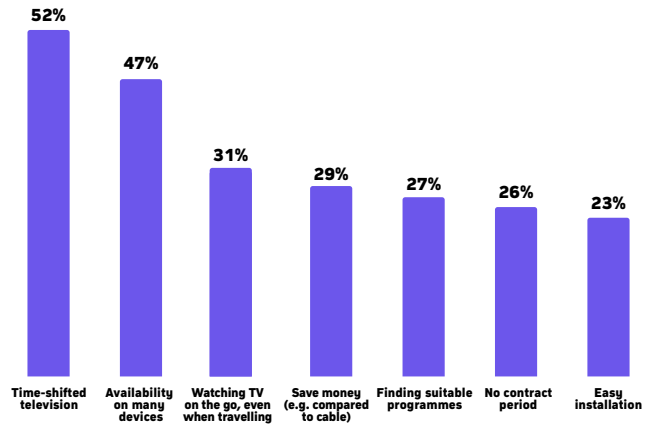
Basis: TV viewers at least 1 day per week  
Basis unweighted: 899

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



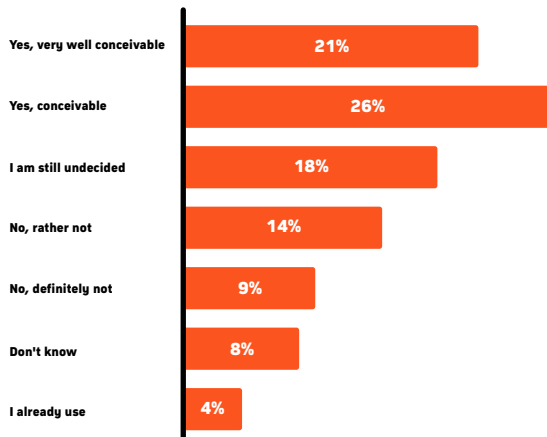
2023 Basis unweighted: 1016  
2023 Basis unweighted: 1000  
Multiple answers possible

# 4 What are the most important advantages of TV streaming?



Basis: Users of at least 1% TV streaming services  
Basis unweighted: 700  
Multiple answers possible

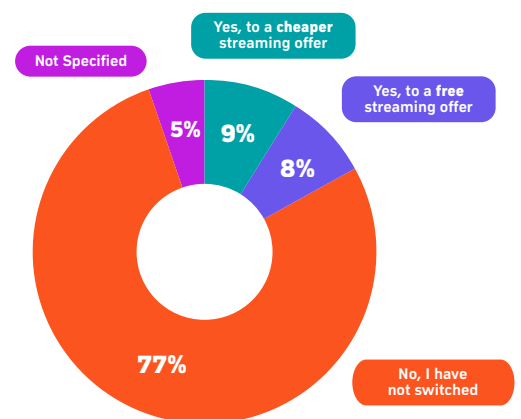
# 5 Can you imagine using the TV service exclusively via the Internet in the future?



Basis unweighted: 1016

Source: Kantar

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



Basis: All respondents, regardless of having a streaming subscription  
Basis unweighted: 1016