



# ADVANCED TV STUDY 2024 SUMMARY

ADVERTISING ON CONNECTED TV IS BECOMING  
INCREASINGLY EFFECTIVE



**GOLDBACH**

# FOREWORD

Awareness and usage of connected TV remains at a high level in the DACH region, as Goldbach has already demonstrated in the last editions of its study series. The current seventh edition of the Goldbach study shows that advertising on connected TV is perceived and accepted much more strongly by respondents compared to the previous year.

The results of this year's study show once again that connected TV plays an important role in the media mix in order to address specific target groups, such as cord cutters and heavy streamers, who are difficult or impossible to reach via other channels. In addition to the previous studies, the awareness of the advertising formats Connected TV Spots and Connected TV Ads was surveyed, as well as second-screen usage during Connected TV consumption.

In this year's edition of the study series, the survey focuses on the following topics:

- Equipment & access
- Awareness & usage
- Content & motivation
- Advertising perception & acceptance

**ADVERTISING ON CONNECTED TV IS BECOMING INCREASINGLY EFFECTIVE**

Goldbach Germany GmbH

**GOLDBACH**





## SAMPLE

n=3500

**Germany: n=1500,**

Austria: n=1000, Switzerland: n=1000

Quota according to age (3 age groups, 1/3 each)  
and gender (50:50)



## METHOD

Online survey in the DACH region among people  
aged 16-69 years

**Following version is on german data.**

All changes compared to previous years are  
shown in percentage points



## PERIOD

January 2024



# STUDY PROFILE

7TH EDITION OF THE DACH STUDY ON THE USE OF CONNECTED TV

## SURVEY CONTENTS:

### **Awareness, type and use of connected TV:**

Participants were asked about their familiarity with connected TV, the types of connected TV devices they own and how often they use them.

### **Ownership of Internet-enabled televisions:**

It was determined whether the respondents had Internet-enabled televisions and, if so, which functions they used.

### **App use on internet-enabled TV sets:**

The survey included questions about the use of apps on internet-enabled TVs, including the most popular applications and the frequency of their use.

### **Perception and assessment of advertising in the area of additional functions on Connected TV:**

The participants were also asked about their perception and evaluation of advertising in connection with the additional functions of Connected TV in order to gain insights into the effectiveness and relevance of this form of advertising.

# CONNECTION QUOTE



AVAILABILITY OF CONNECTED TV



Nearly all Internet-enabled TV sets are also connected.

93%



Ø 2,2  
people sit together in front of the TV set and use CTV

72%

of all respondents have at least 1 internet-enabled TV set at home



82%

of households with children have at least 1 internet-enabled TV set



# ACCESS



## ACCESS TO CONNECTED TV FUNCTIONS



**Samsung Smart TV**  
remains the market leader  
in the DACH region

57% of Smart TV users have a  
Samsung Smart TV



**Amazon Fire TV Cube**  
is the most used  
Streaming box

30% of 16 – 29 year old streaming box  
user use a  
Amazon Fire TV Cube



**Amazon Fire TV Stick**  
is the most used streaming stick

80% of streaming stick users use an  
Amazon Fire TV Stick



**Sony Playstation**  
is the most widely used  
games console

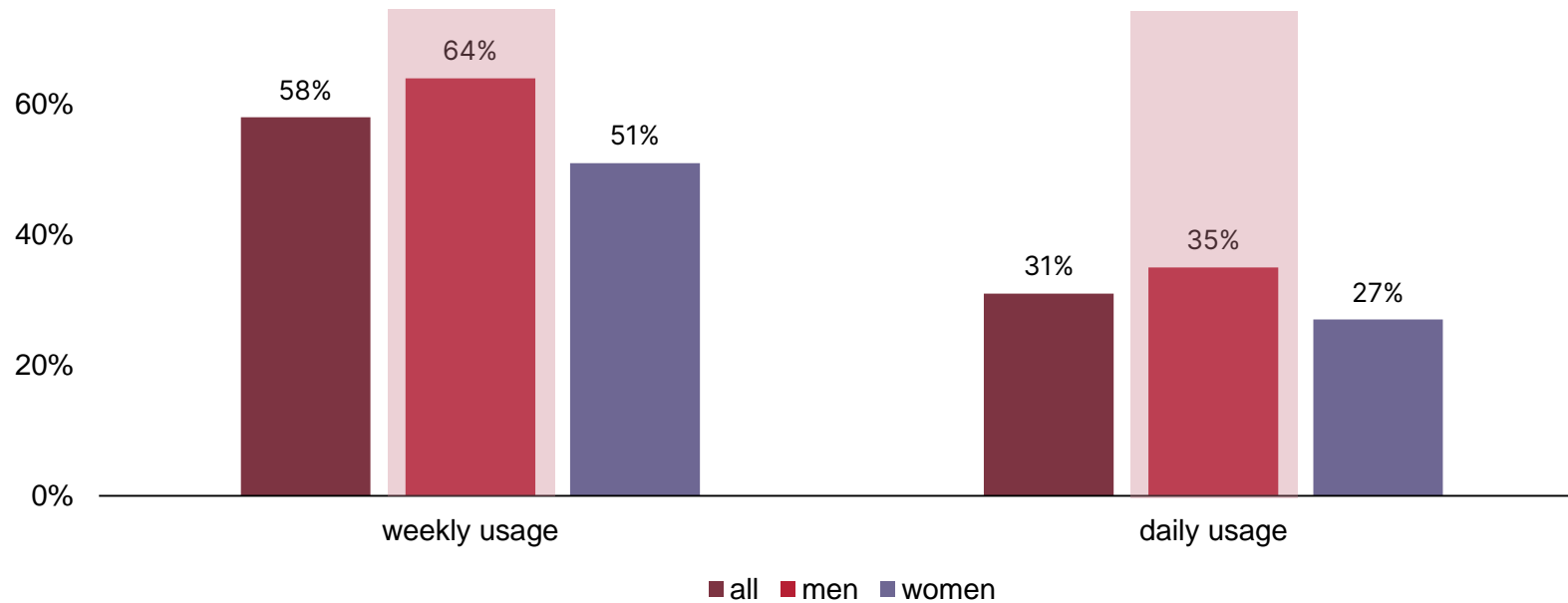
82% der Spielkonsolen-Nutzer\*innen  
nutzen eine Sony Playstation



# USAGE

## WEEKLY AND DAILY USE OF CTV

UTILIZATION, SHARES IN %



Highest usage  
among men

### Detailed

Target group and household analyses for the German market in our [Whitepaper](#)

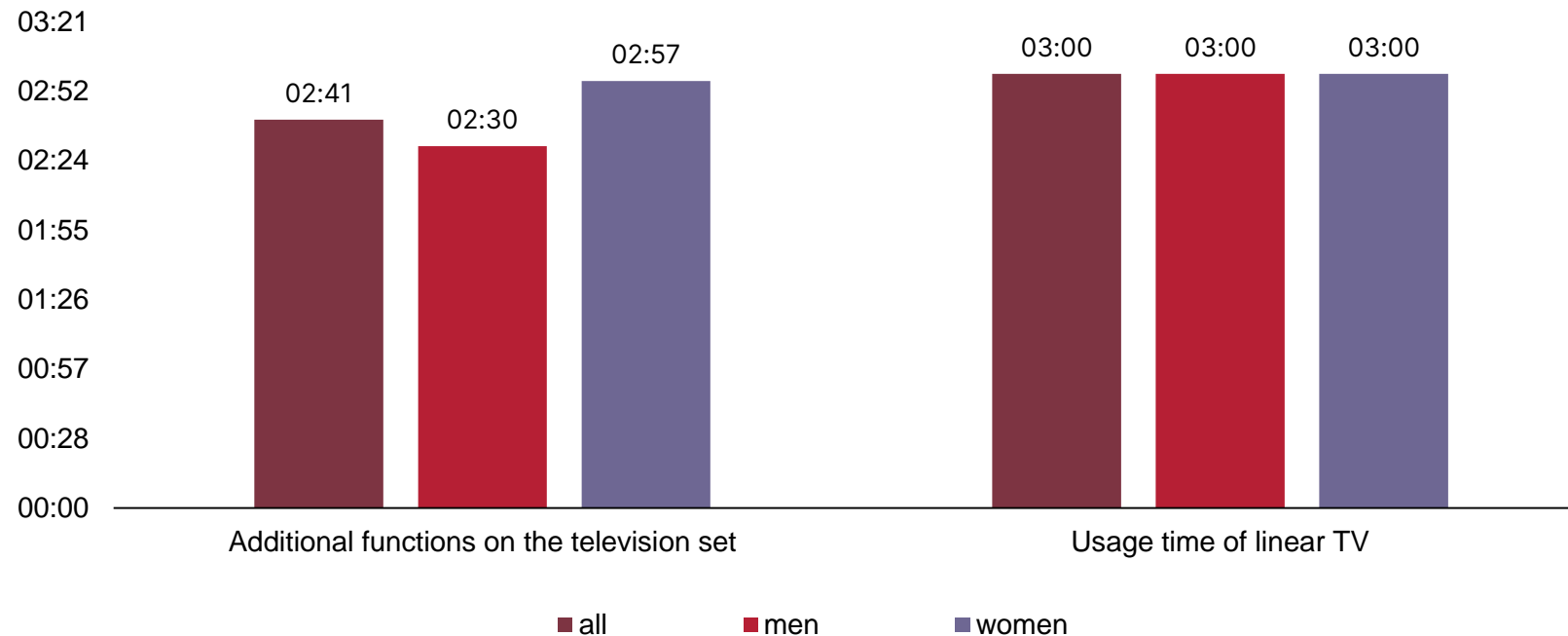




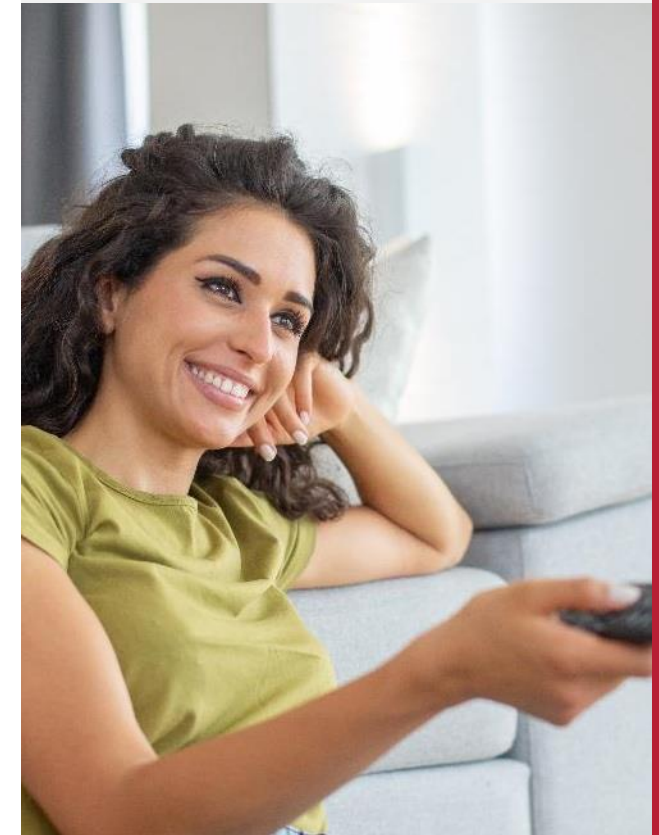
# RETAINING TIME

## DWELL TIME ADDITIONAL FUNCTIONS VS LINEAR TV PROGRAM

LENGTH OF STAY PER DAY (HH:MM)



Dwell times of **CTV** and **linear TV** are converging more and more

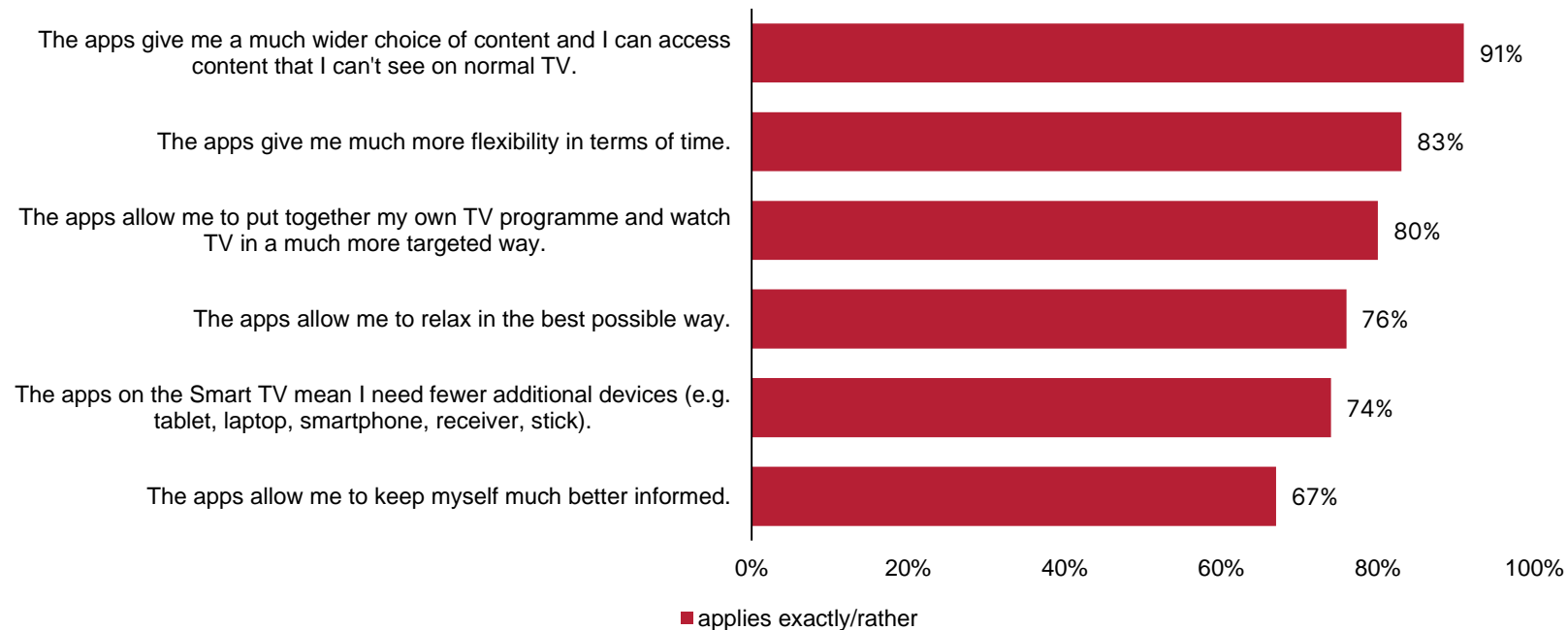




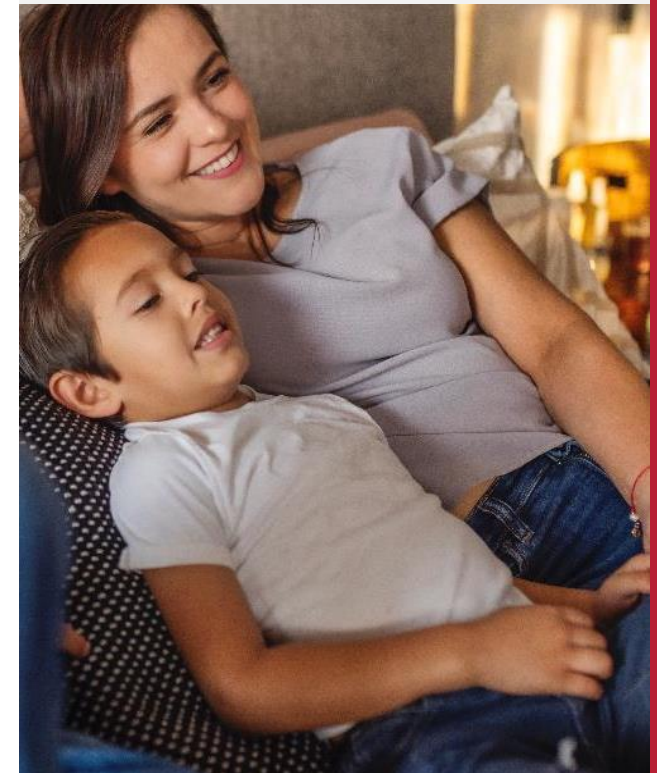
# USE MOTIVES

## USE OF APPS ON THE CTV

MOTIVES FOR USING THE APP, AGREEMENT IN %, ALL APP USERS



Large selection of content is **very popular** when using apps!





# ADS IN APPS

AD-SUPPORTED VS. PAID APPS



Ø 3,0

free apps are used  
by app users



69%

of users of paid apps would  
accept advertising if they  
received the content for free

Ø 2,6

paid apps are used  
by app users



Ø 36€ / CHF

users spend on paid apps on  
Connected TV

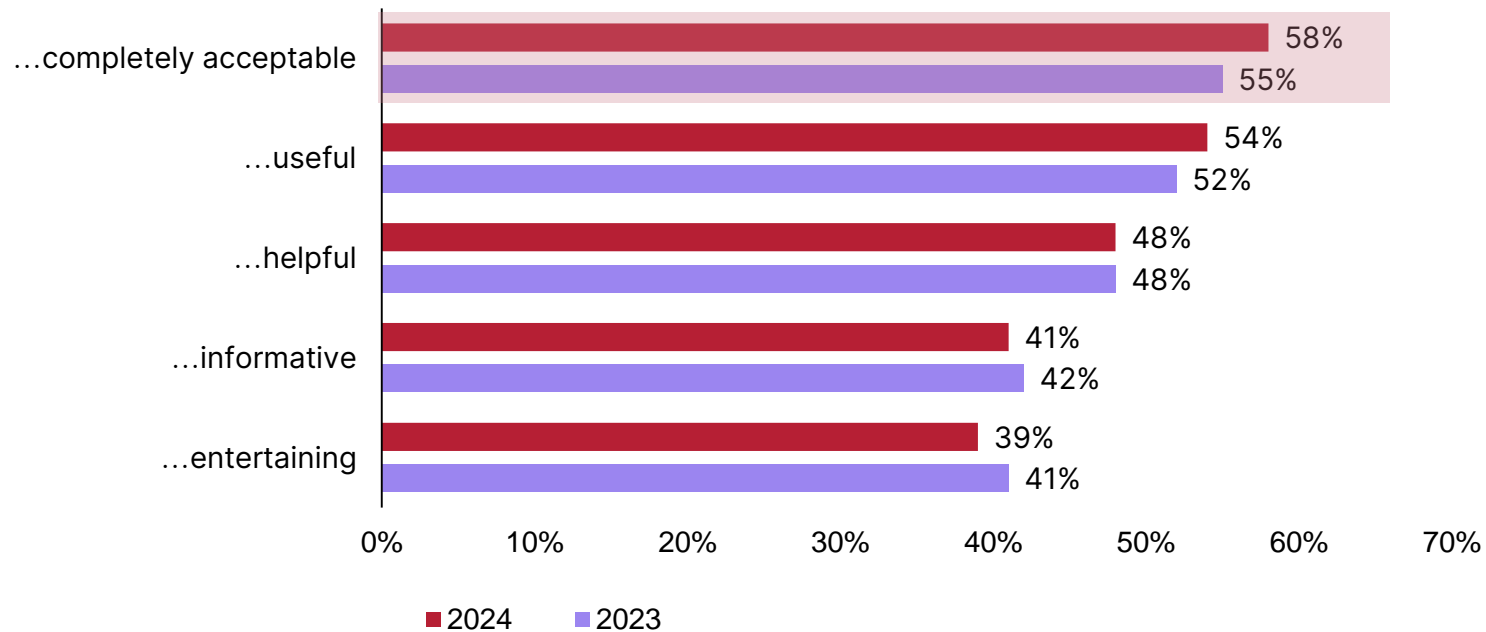




# AD ACCEPTANCE

MORE THAN HALF OF USERS THINK ADVERTISING IS ACCEPTABLE

AGREEMENT "ADVERTISING IN THE ADDITIONAL FUNCTIONS OF CONNECTED TV IS ..." IN %



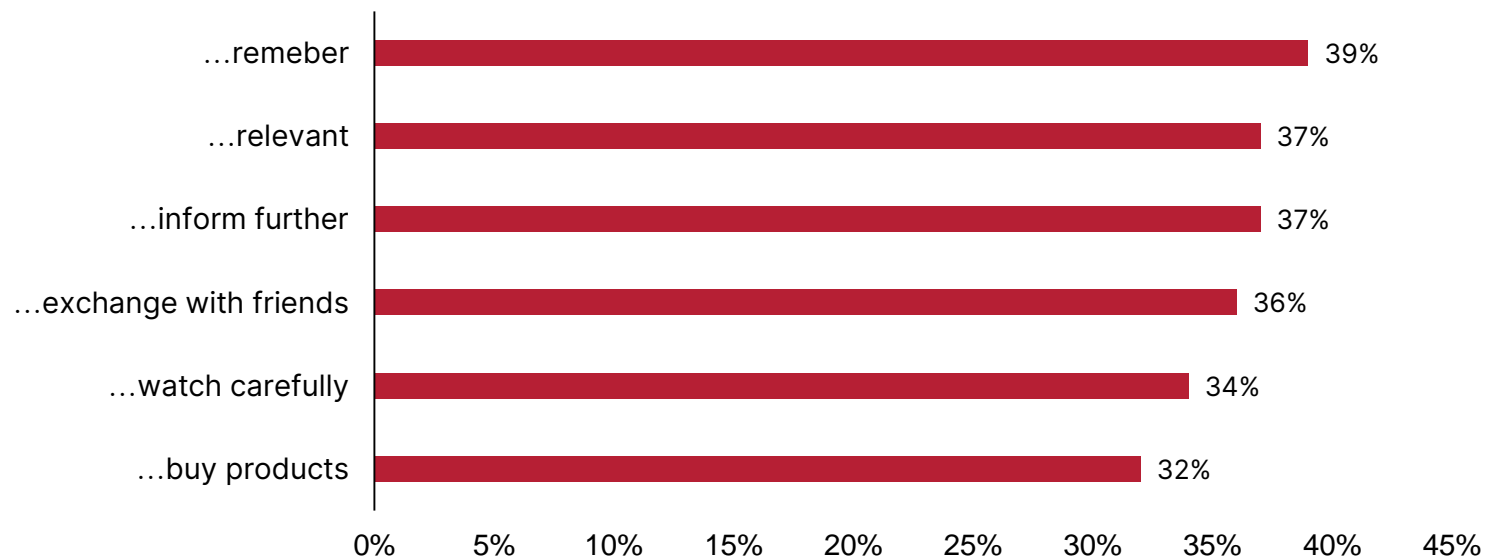
Acceptance increases to **58%**  
+3%\* 2023 vs. 2024



# AD RELEVANCE

39% OF USERS REMEMBER THE ADVERTISING

AGREEMENT "ADVERTISING IN THE ADDITIONAL FUNCTIONS OF CONNECTED TV IS ..." IN %



Ads on CTV lead to actions by users



# CTV SPOTS & CTV ADS



PERCEPTION OF CONNECTED TV SPOTS AND CONNECTED TV ADS



49%

consciously perceive  
Connected TV Spots



38%

consciously perceive  
Connected TV Ads

62%

know Connected TV Spots



56%

know Connected TV Ads



# KEY FACTS 2024

1

**ONE-TO-MANY: Ø 2.2 PEOPLE USE CONNECTED TV TOGETHER**

2

**STEADY USE: 58% USE CTV WEEKLY, 31% EVEN DAILY**

3

**CTV HAS FIRMLY ESTABLISHED ITSELF IN MEDIA USAGE: VIEWING TIME ALMOST EQUAL TO LINEAR TV**

4

**FREE CONTENT PREFERRED: 2/3 WOULD ACCEPT ADVERTISING**

5

**GREAT POTENTIAL FOR ADVERTISERS: ADVERTISING ON CTV IS BECOMING INCREASINGLY EFFECTIVE**

# THANK YOU WITH PASSION

**Mario Neumann**  
Director Business Development  
T +49 89 614 240 414  
mario.neumann@goldbach.com

**Philipp Sonder**  
Sales & Consulting Online Video & CTV  
T +49 89 614 240 409  
philipp.sonder@goldbach.com



[www.goldbach.com](http://www.goldbach.com)

SUMMARY