



The FreeWheel Viewer Experience Lab Presents

Voice of the Viewer

HOW AD EXPERIENCES IMPACT STREAMING FOR VIEWERS ACROSS EUROPE



VIEWER EXPERIENCE LAB

About the FreeWheel Viewer Experience Lab

The FreeWheel Viewer Experience Lab is designed to help media companies improve the quality, quantity, and relevance of TV advertising through quantifiable research, solutions, and technology. To learn more, visit freewheel.com/viewer-experience-lab.

Introduction

In the golden age of television across traditional and streaming, viewers have more choices than ever when it comes to what they watch, how they watch, and how much advertising they see. As more viewers turn to ad-supported subscriptions, it's critical for advertisers and publishers to understand what viewers expect from their streaming ad experiences.

To uncover insights and recommendations around this topic, the [FreeWheel Viewer Experience Lab](#) conducted custom research across the U.S. and Europe. And while our research found that 83% of European viewers are satisfied with their overall streaming experience,¹ they told us there are still improvements that can be made.

In this report, the Viewer Experience Lab provides insight into where European viewers are satisfied, where they are frustrated, and what role advertisers play in sustaining positive momentum in a streaming-first world.



Study approach



European viewers

In partnership with Dynata, the FreeWheel Viewer Experience Lab gathered 4,000 survey responses from adults 18+ from France, Germany, Italy, Spain, and the UK, who have watched traditional or streaming TV content in the past 3 months and subscribe to/have access to free (FAST) or paid streaming services in their household. The responses were then analyzed to offer marketers and publishers key insights into how viewers feel about today's streaming ad experience.



U.S. viewers

To dive deeper into how viewing habits differ outside of Europe and to learn how U.S. viewers feel about today's streaming experience, download the U.S. version of [Voice of the Viewer](#).

VIEWERS TOLD US:

They're satisfied with the streaming experience

Overall, viewers say they are satisfied with their streaming experience, which has led to improved subscriber retention and growth in subscribers.

Why this matters

Viewers have bought into streaming as TV, with many using it as their primary big screen experience. As positive improvements continue to enhance the viewer experience, audiences report overall satisfaction with streaming, making it a valuable canvas for brands to connect with them in premium environments.

**Statistically significant difference.*



83%

83% of viewers are satisfied with their streaming experience¹



+148%

They are **+148% more likely** to choose streaming over the traditional way of receiving TV when given a choice¹



78%

78% have not canceled any streaming services in the past year, and they are **-10% less likely** to churn than U.S. viewers^{1*}

VIEWERS TOLD US:

Content is primarily what drives satisfaction

Streaming satisfaction is primarily driven by the content, and **42%** say access to desirable content is better than 5 years ago.¹

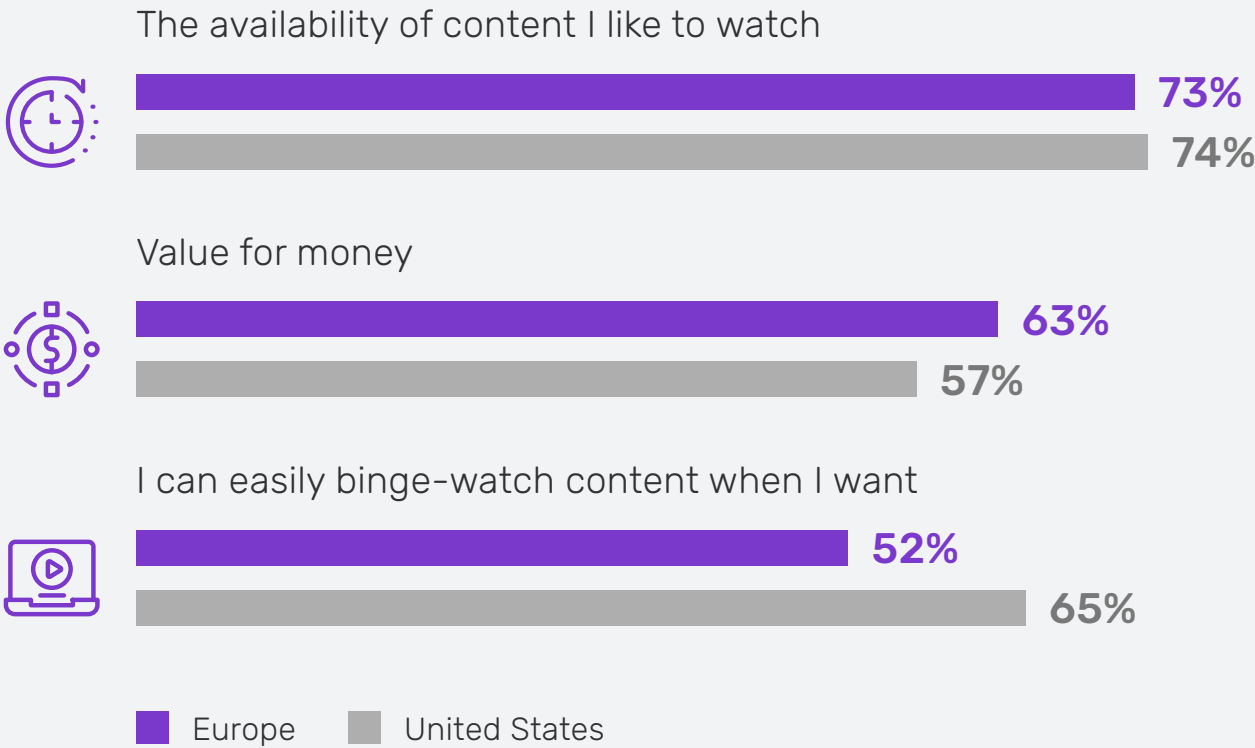
While access to desirable content drives satisfaction, value for money is another key factor – especially for Europeans, who are **+11% more likely** to cite value for money than U.S. adults.^{1*}

Why this matters

Streaming satisfaction starts with the content viewers love – but creating more of that content, and at a higher quality, requires resources and advertising is the engine that makes this possible while keeping costs manageable for consumers.

**Statistically significant difference.*

Top 3 things viewers enjoy about streaming services¹



VIEWERS TOLD US:

They are accustomed to ads while watching content

Viewers recognize ads as a natural part of watching content and many use ads as a discovery tool.

Why this matters

As AVOD further becomes the norm for streaming, content owners must continue to prioritize the viewer experience – inclusive of the ad breaks – which ultimately will drive better brand results and help publishers better monetize their premium video inventory.

49%

selected a plan with ads when they signed up for the service^{1*}

44%

say they are accustomed to ads while watching content¹

40%

usually search for content they previously saw in an ad¹

Of the services you subscribe to or have access to, do they have ads?^{1**}

47% All have ads

38% Some have ads, some are free

15% All ad-free

85% of viewers have services with ads

*AVOD subscribers only. **Paid streaming subscribers.

VIEWERS TOLD US:

Ad experience and satisfaction go hand in hand

While viewers see ads as a part of their viewing experience, ad quality and placement matter. Dissatisfied viewers are **+26% more likely** to have experienced an ad interrupting dialogue,^{1*} signaling a link between the ad experience and overall viewer satisfaction.

🗣️ Why this matters

Viewers are open to ads, but [research](#) shows that unnatural ad breaks and low ad quality can have negative impacts on brand recall.² Publishers should leverage AI to determine optimal ad break placement. Advertisers should prioritize overall ad quality, especially for premium video inventory, to maximize halo effects.

*Statistically significant difference.

+10%

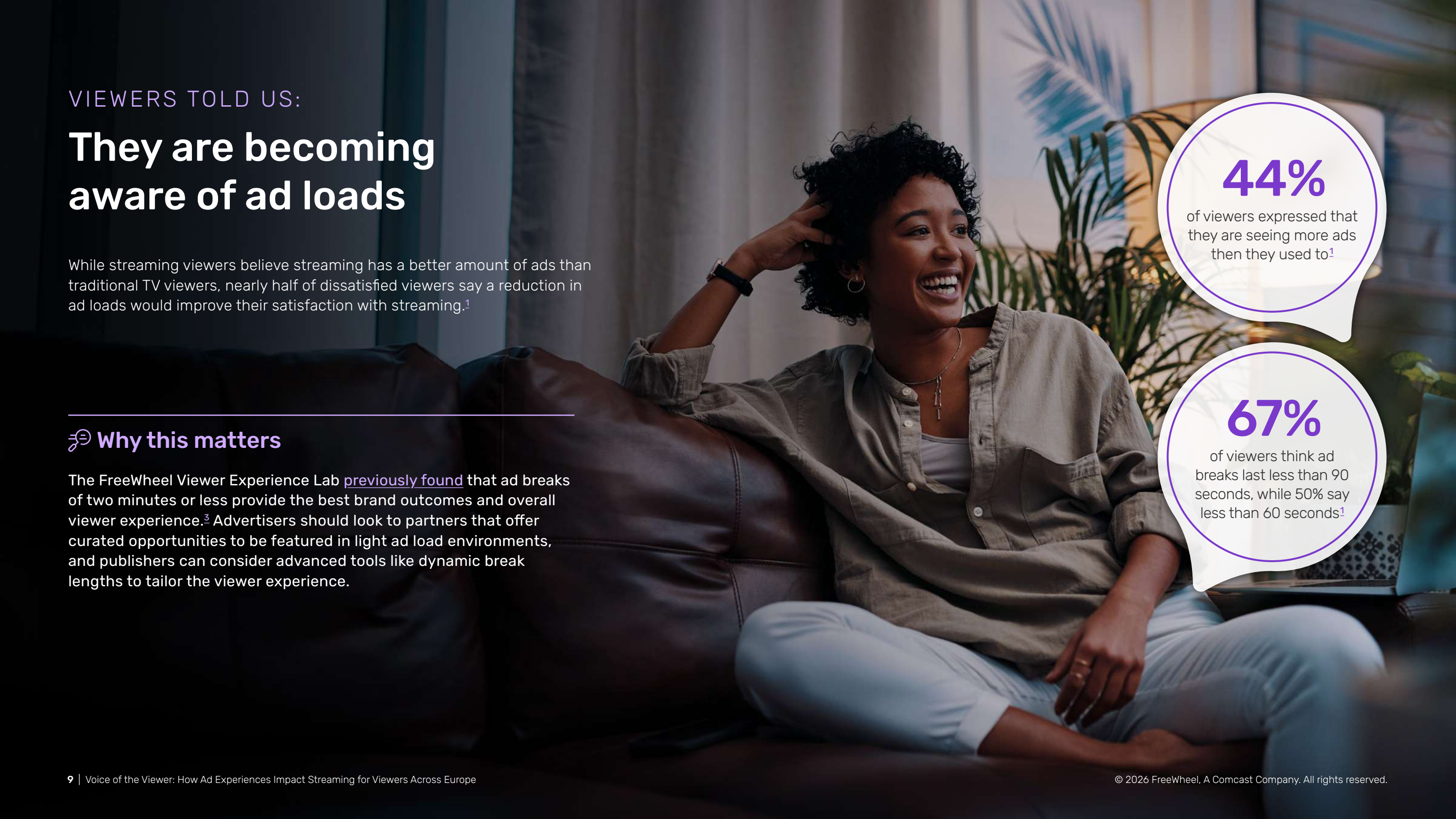
AVOD viewers are **+10%* more likely** to find ads intrusive than those watching traditional TV¹

46%

of AVOD viewers have experienced a difference in ad and content volume¹

39%

of AVOD viewers who find ads disruptive say they appear at the wrong time¹



VIEWERS TOLD US:

They are becoming aware of ad loads

While streaming viewers believe streaming has a better amount of ads than traditional TV viewers, nearly half of dissatisfied viewers say a reduction in ad loads would improve their satisfaction with streaming.¹

🔗 Why this matters

The FreeWheel Viewer Experience Lab [previously found](#) that ad breaks of two minutes or less provide the best brand outcomes and overall viewer experience.³ Advertisers should look to partners that offer curated opportunities to be featured in light ad load environments, and publishers can consider advanced tools like dynamic break lengths to tailor the viewer experience.

44%

of viewers expressed that they are seeing more ads than they used to¹

67%

of viewers think ad breaks last less than 90 seconds, while 50% say less than 60 seconds¹

VIEWERS TOLD US:

Ad repetition is more common on AVOD

The majority of people are seeing the same set of ads on AVOD, causing them to tune out. Dissatisfied viewers are **+30% more likely to have experienced ad repetition in a single episode compared to satisfied viewers.**¹

Why this matters

Repeated exposure to ads in a single sitting can cause viewers to tune out the ads. Publishers and advertisers can implement frequency capping to improve the viewer experience for binge-watchers.

**Statistically significant difference.*



55%

55% say they keep seeing the same set of ads¹



-9%

AVOD viewers are **-9% less likely** to cite exposure to multiple brands than traditional TV viewers^{1*}



35%

35% of AVOD subscribers see the same ad multiple times in one break¹

VIEWERS TOLD US:

Ad breaks are working in live events

The expectation of ads, along with natural ad breaks in live content like sports, can lead to better reception.

🔗 Why this matters

There are added complexities in live events in streaming, but there is incredible opportunity to target audiences at scale with things like [dynamic ad insertion](#) and [programmatic](#). Advertisers need to make sure they work with partners who can leverage the full value of live.

**Statistically significant difference.*

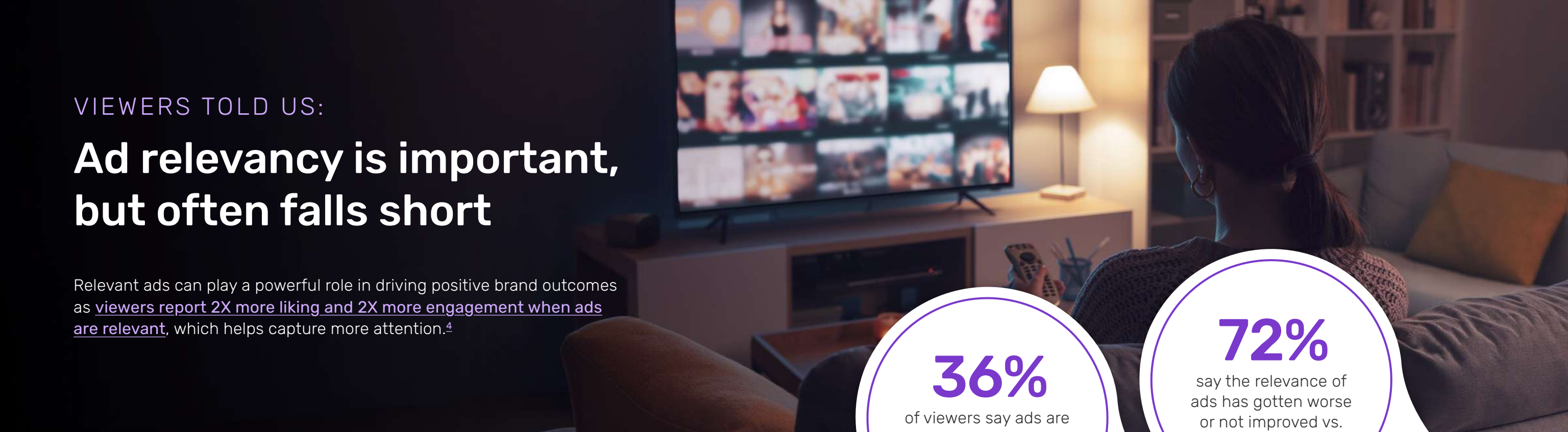
***Responses for never experience, rarely, or happens every couple of episodes.*

+13%

Live viewers are **+13% more likely** to say ads fit in seamlessly with live content than the viewers of episodic content^{1*}

88%

of viewers infrequently experience delays or lags when watching live content on streaming^{1**}



VIEWERS TOLD US:

Ad relevancy is important, but often falls short

Relevant ads can play a powerful role in driving positive brand outcomes as [viewers report 2X more liking and 2X more engagement when ads are relevant](#), which helps capture more attention.⁴

36%

of viewers say ads are tailored to products they are interested in or would buy¹

72%

say the relevance of ads has gotten worse or not improved vs. five years ago¹

35%

of viewers find ads disruptive or intrusive because ads are not relevant to them¹

Why this matters

Tailored, relevant ads feel less disruptive to viewers. Advertisers can leverage [identity-based solutions](#) and [contextual targeting](#) enabled by publishers to create a more seamless viewing experience.

VIEWERS TOLD US:

They're open to AI supporting their streaming ad experience

As AI becomes more embedded in people's lives, viewers report being open to the technology playing a role in their ad experiences.

🔗 Why this matters

Advertisers can harness AI to efficiently generate multiple creative variations to personalize the ad experience and help minimize creative fatigue. However, systems would need to be established to ensure consistent quality and accuracy.

57%

say they are open to AI deciding which ads are shown during the content¹

48%

say they are open to AI being used to create the ads they see during the content¹

How buyers and sellers can continue to improve the viewer experience

While this research shows that viewers are overall satisfied with their streaming experience today, both advertisers and publishers have important roles to play to ensure that they're prioritizing audiences and delivering high-quality ad experiences while they enjoy the content they love:

Advertisers

- Consider advertising in light ad load environments.
- Work with identity solution providers that can help with frequency capping.
- Leverage audience or contextual targeting.
- Use AI to create tailored or mixed versions of creative for different audiences and reduce ad fatigue.

Publishers

- Keep ad breaks to two minutes or less.
- Implement frequency capping at the player level.
- Enable contextual and audience targeting optionality for buyers.
- Use AI to optimize ad delivery through the right ad technology.

Sources

- 1** FreeWheel survey conducted by Dynata, n= 4,000. Countries include France, Germany, Italy, Spain, & UK. Base: Europeans who have watched video content (excluding social media) in the past 3 months and subscribe to/have access to paid streaming or FAST in their household. Paid Streaming: N=3,695. AVOD Subscribers = 3,132. Some comparisons made to U.S. version of survey.
- 2** FreeWheel Viewer Experience Lab, Improving the Quality of Ad Experiences, May 2024.
- 3** FreeWheel Viewer Experience Lab, Designing a Better Ad Pod, January 2024.
- 4** FreeWheel Viewer Experience Lab, Making the Ad Experience More Relevant, December 2024.

Responses by country

VIEWERS TOLD US:

Streaming satisfaction is high, driven by content

Overall streaming satisfaction by country*



*Top 2 Box Shown (Satisfied & Very Satisfied)

Top things viewers enjoy about streaming services

	France	Germany	Italy	Spain	UK	U.S.
Content availability	74%	66%	66%	77%	81%	74%
Value for money	68%	57%	63%	67%	61%	57%
I can easily binge-watch content when I want	42%	67%	41%	43%	63%	65%
Ease of searching/scrolling on the home screen	45%	35%	39%	38%	44%	42%

VIEWERS TOLD US:

Viewers choose AVOD

Of the services you subscribe to or have access to, do they have ads?

	France	Germany	Italy	Spain	UK	U.S.
They all have ads	46%	44%	58%	44%	45%	44%
Some have ads, some are ad-free	31%	40%	32%	40%	44%	45%
All are ad-free	23%	16%	10%	16%	11%	11%

What is the reason you have streaming services with ads?

	France	Germany	Italy	Spain	UK	U.S.
Selected the plan when I signed up for the service	46%	47%	49%	46%	56%	61%
It was part of a bundle with another service	18%	19%	22%	27%	23%	22%
I recently downgraded	30%	17%	14%	15%	17%	15%
The service doesn't give me an ad-free option	12%	18%	13%	14%	16%	12%
I use someone else's account	9%	10%	9%	10%	7%	9%

VIEWERS TOLD US:

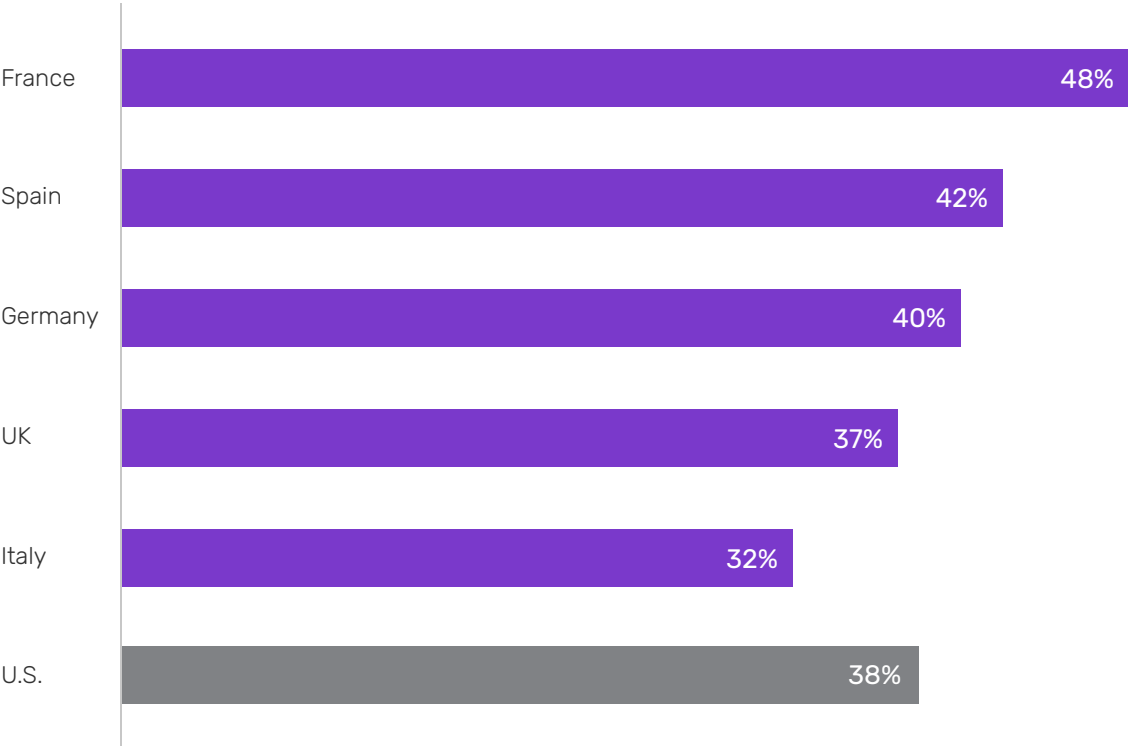
Ad quality, placement, and repetition impact viewing experience

Think about your typical experience while watching video content (excluding social media, e.g., TikTok, Reels). Have you experienced any of the following in the past 3 months? *(Top 3 Box)**

	France	Germany	Italy	Spain	UK	U.S.
Seeing the same ad multiple times in one episode/program	53%	64%	51%	57%	63%	73%
The volume of the ad is quieter/louder than the episode/program	48%	50%	42%	45%	48%	55%
An ad appearing before the scene is over/in the middle of the dialogue	47%	47%	35%	48%	39%	41%

**Among AVOD viewers only*

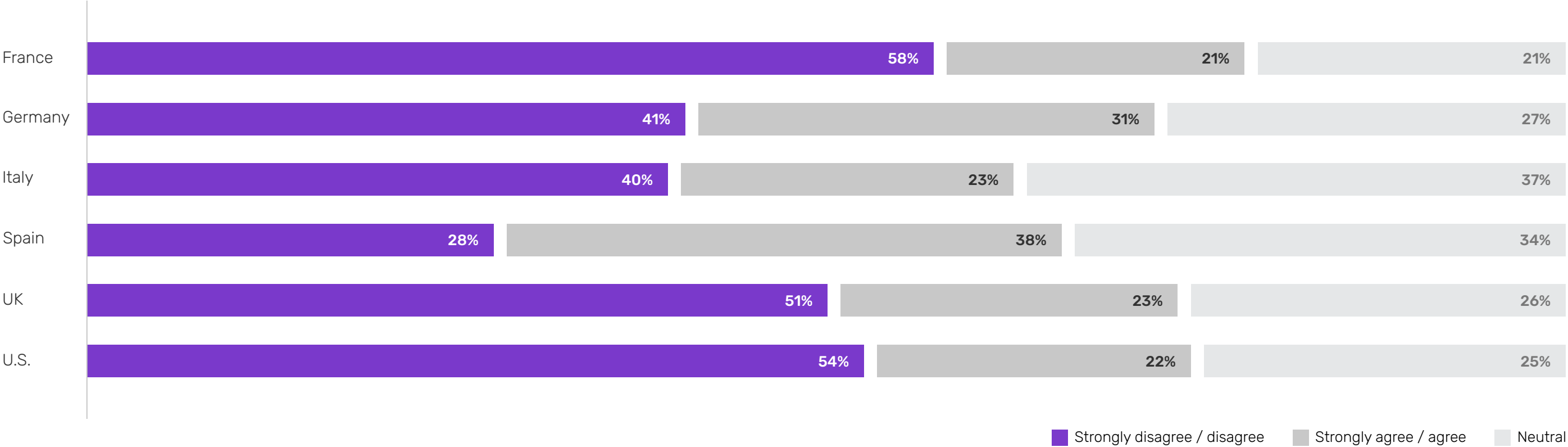
Share of viewers who find ads disruptive who say “Ads usually appear at the wrong time”



VIEWERS TOLD US:

They are becoming aware of ad loads

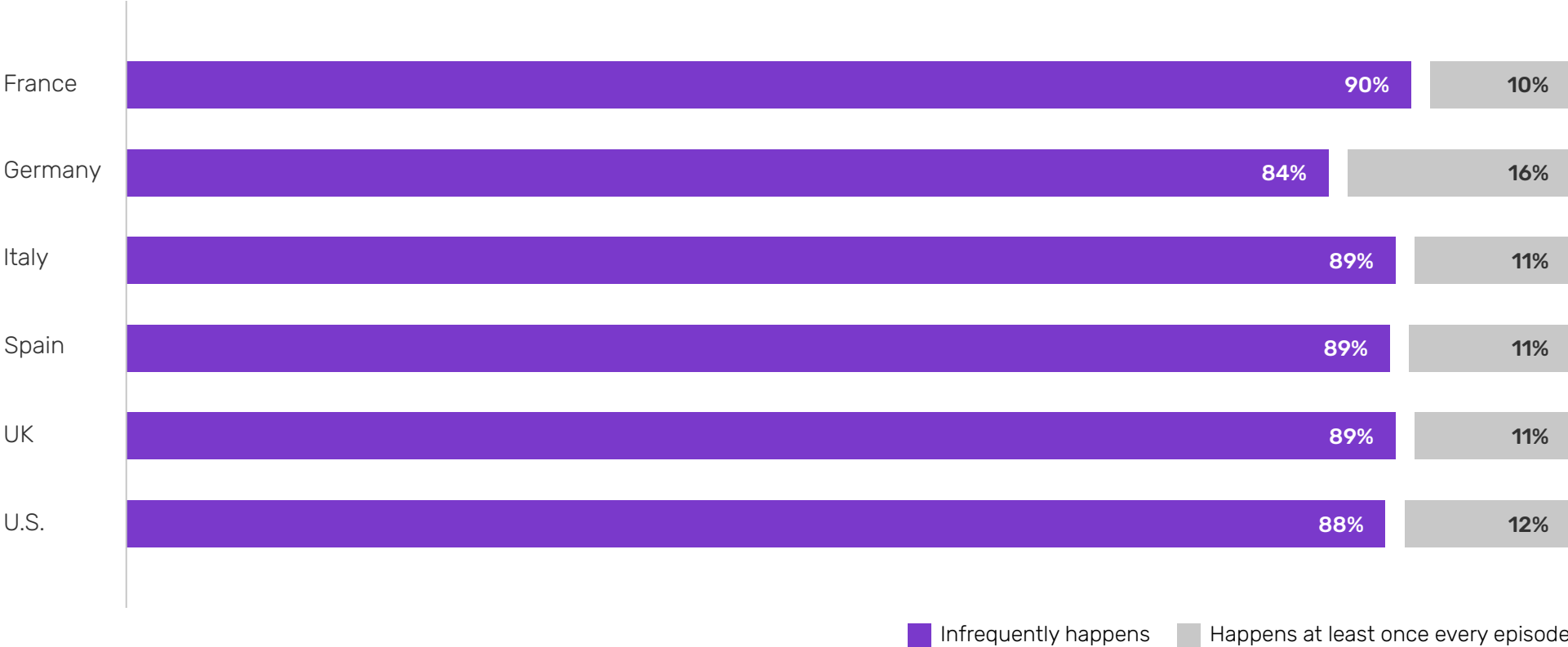
Please rate your agreement with the following statement about these ads: “I am seeing less ads than I used to”



VIEWERS TOLD US:

Ad breaks are working in live events

How often do you experience delays or lags in live content?



VIEWERS TOLD US:

Ad relevancy is important, but often falls short

	France	Germany	Italy	Spain	UK	U.S.
Better than 5 years ago	24%	27%	28%	29%	30%	28%
Worse than 5 years ago	31%	29%	30%	34%	30%	26%
No difference	45%	44%	42%	37%	40%	46%

	France	Germany	Italy	Spain	UK	U.S.
Ads are tailored to products I'm interested in or would buy <i>(Strongly agree or agree)</i>	32%	32%	39%	37%	39%	33%
[I find ads disruptive or intrusive because] ads I see are not relevant to me	39%	46%	22%	21%	48%	49%

VIEWERS TOLD US:

They’re open to AI for personalisation and enhancing the ad experience

Outside of recommending content to watch, would you be open to AI being used for the following?
(% of respondents who said yes)

	France	Germany	Italy	Spain	UK	U.S.
Content created specifically for me based on my viewing history	53%	52%	63%	60%	67%	57%
Deciding which ads are shown during content	50%	51%	62%	60%	64%	66%
Creating the ads shown during the content	40%	52%	48%	50%	53%	50%
Writing the scripts for the content I watch	46%	42%	41%	41%	53%	43%
Creating the characters/voices in the content I watch	42%	41%	42%	45%	50%	43%



FreeWheel technology is built for streaming and TV ads. We connect buyers and sellers directly, making it easier to access supply and demand. We provide all the tools, data, and insights you need to maximize results. [Read more insights on TV and premium video advertising here.](#)



Maximizing Brand Recall Through Contextual Alignment

How contextual results drive results for advertisers

This report delivers findings from an innovative study on the impact of contextually aligned ads on the viewer's memory for brands and offers considerations for how advertisers and publishers can capitalize on the benefits of contextual alignment.

[Download Report →](#)



Making the Ad Experience More Relevant

The importance of ad relevancy and the viewer experience

The report shares insights into how relevant ads can have a positive impact on brand outcomes. It also lays out the steps that buyers and sellers need to consider when developing more relevant ad experiences for their audiences.

[Download Report →](#)



Designing a Better Ad Pod

Ad pod recommendations to optimize brand impact and the viewer experience

This report focuses on how optimizing the quantity and frequency of ads in an ad pod can improve both ad experience and brand results, balancing the interests of viewers and brands, without diminishing publisher inventory.

[Download Report →](#)